

# North Miami Economic /Market Evaluation



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### INTRODUCTION

Strategic Planning Group, Inc. was retained by the City of North Miami and Keith and Schnars, P.A., to provide an economic evaluation of the City as part of the City's Downtown Development Master Plan. The majority of this planning effort is primarily focused on five major corridors: NE 125<sup>th</sup> Street, Biscayne Boulevard, West Dixie Highway, NW 7<sup>th</sup> Avenue (US 441) and NW 119<sup>th</sup> Street.

The City of North Miami, especially its Community Redevelopment Agency (CRA) has funded numerous studies with the intent of increasing the economic vitality of the City and its downtown. These included:

- Urban Land Institute Technical Assistance Panel Report (April 15-16, 2009)
- Buxton Company's North Miami, FL Retail Trade Evaluation (April 2009)
- North Miami Economic Development Action Plan (Final Draft as of 07-23-10)

This evaluation is meant to update the findings of these studies and provide economic/redevelopment guidance on the corridors mentioned above.

### HISTORY

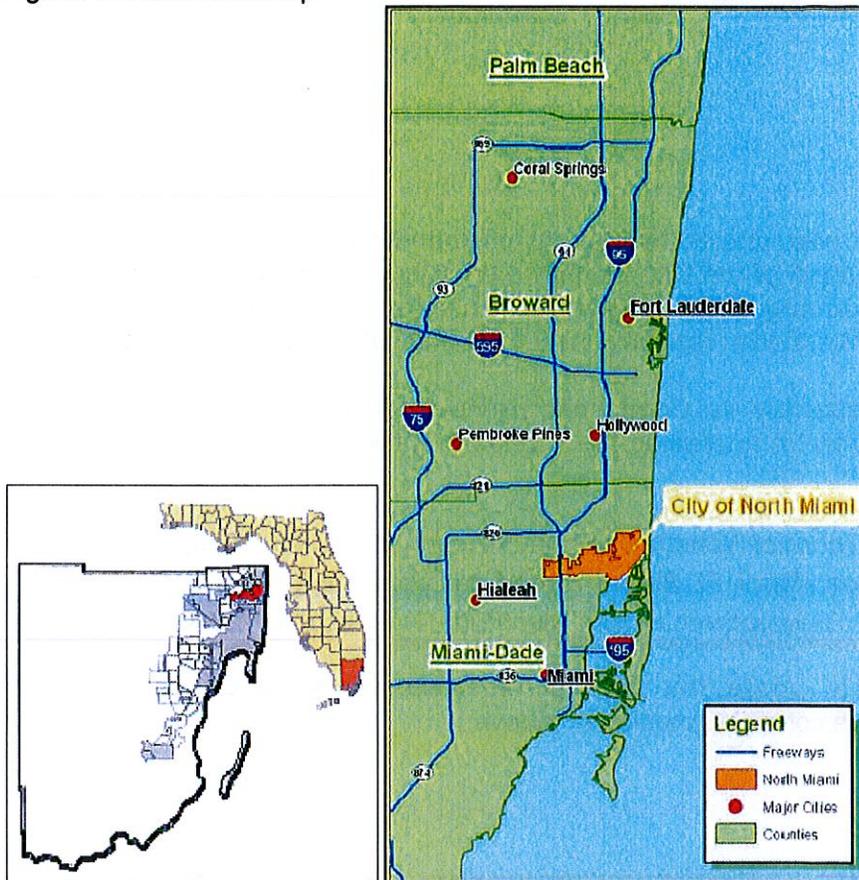
The City of North Miami's history is closely tied to the opening of the Arch Creek Railroad Depot at 125th Street and the F.E.C. tracks in 1896. By 1905 the area surrounding the Depot had become the community's hub and it is reported that by 1912, eighteen homes, a church, a general store, a blacksmith shop, and two tomato packing houses were located around the railroad. The population was estimated at less than one hundred. Farming was the principal occupation.

As a result of the Florida land boom of the 1920's and the need for developable land, the Biscayne Canal was dug in 1924 and this drained land became available development. In 1926 the City was incorporated as the "Town of Miami Shores" as the original town was bounded on the South by Miami and Miami Beach, on the East by the Atlantic Ocean, on the West by 17th Avenue, and on the North by a line which approximates Golden Glades Drive or 166th Street. As a result of the new charter enacted on May 27, 1953, the City established its new boundaries and its new name - "City of North Miami".

**LOCATION**

The City of North Miami is strategically located between Miami and Fort Lauderdale. It is served by an excellent transportation network making it easily accessible from Interstate 95, US Highway 1, the Florida Turnpike, West Dixie Highway, and the US Highway 441. North Miami is less than a 30-minute drive from Florida's two major airports - Fort Lauderdale/Hollywood International and Miami International. It is also in close proximity to the Port of Miami and Port Everglades, both important gateways to major national and international markets.

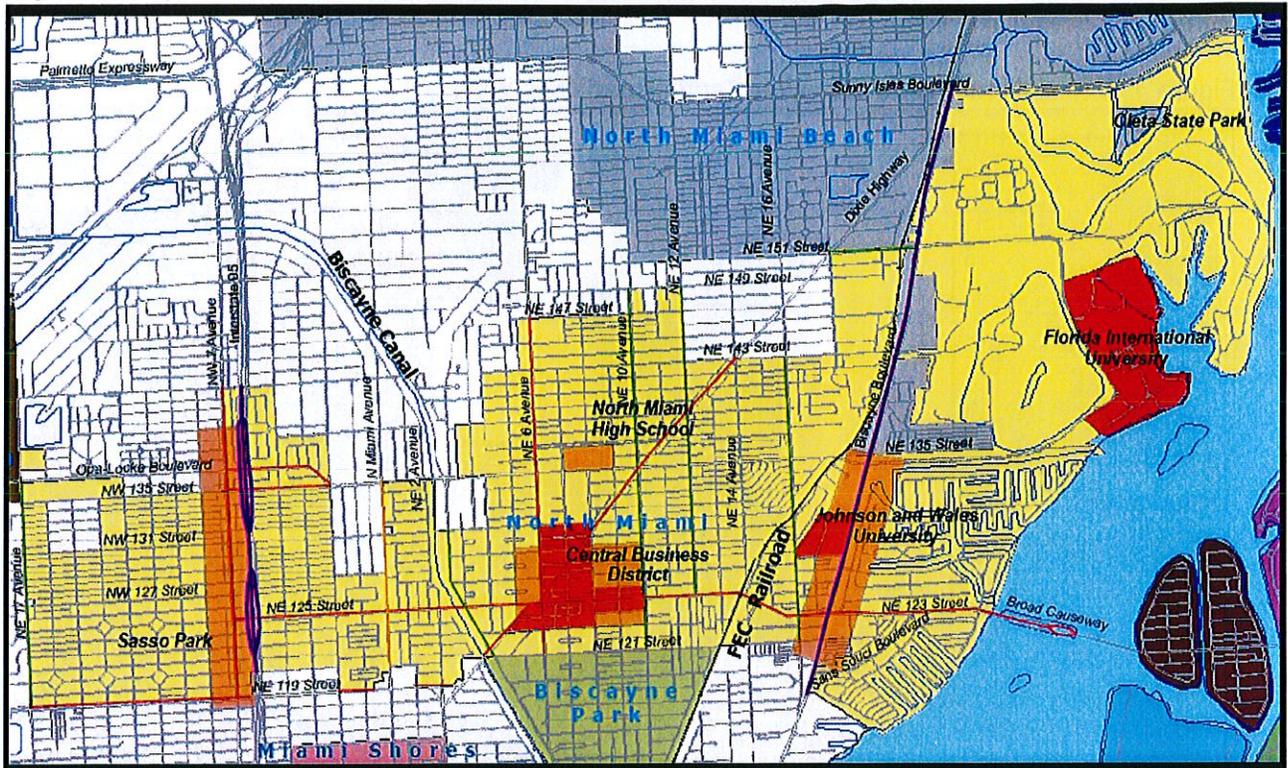
Figure 1. Locational Map



The City form is rectangular in shape, comprising, according to the United States Census Bureau, a total area of 10.0 square miles (26 km<sup>2</sup>) of which 8.5 square miles (22 km<sup>2</sup>) of it is land and 1.5 square miles (3.9 km<sup>2</sup>) of it (15.32%) is water.

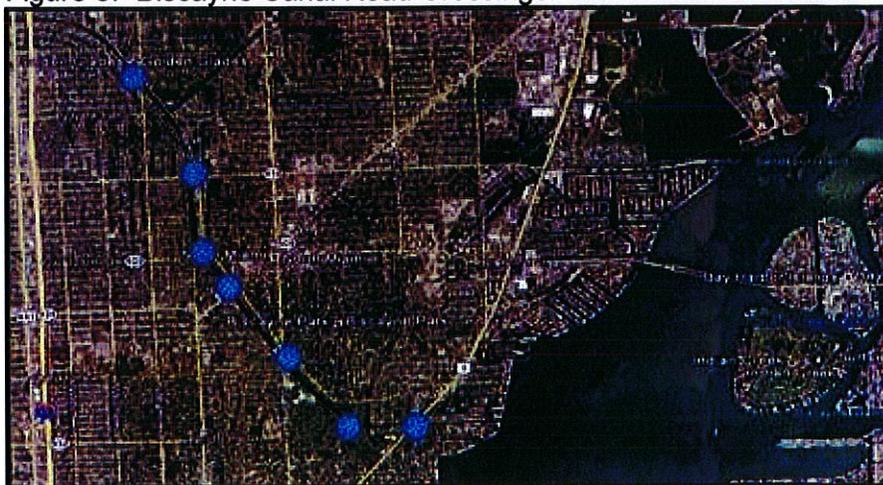
The City is bisected north and south by Interstate 95 (the major north/south highway), and N.W. 7th Avenue on the west, and on the east by 6<sup>th</sup> Avenue, West Dixie Highway and Biscayne Boulevard. The City has limited east-west corridors with only 135<sup>th</sup> Street (SR 926) completely traversing the City. NE 125<sup>th</sup> Street (SR 922) provides access primarily from I-95 eastward where it converges with NE 123<sup>rd</sup> Street and the Broad Causeway providing direct access to the affluent beach communities. Finally, NW 119<sup>th</sup> Street (SR 924) provides access from the west to just beyond I-95 to the east.

Figure 2. City of North Miami Boundaries



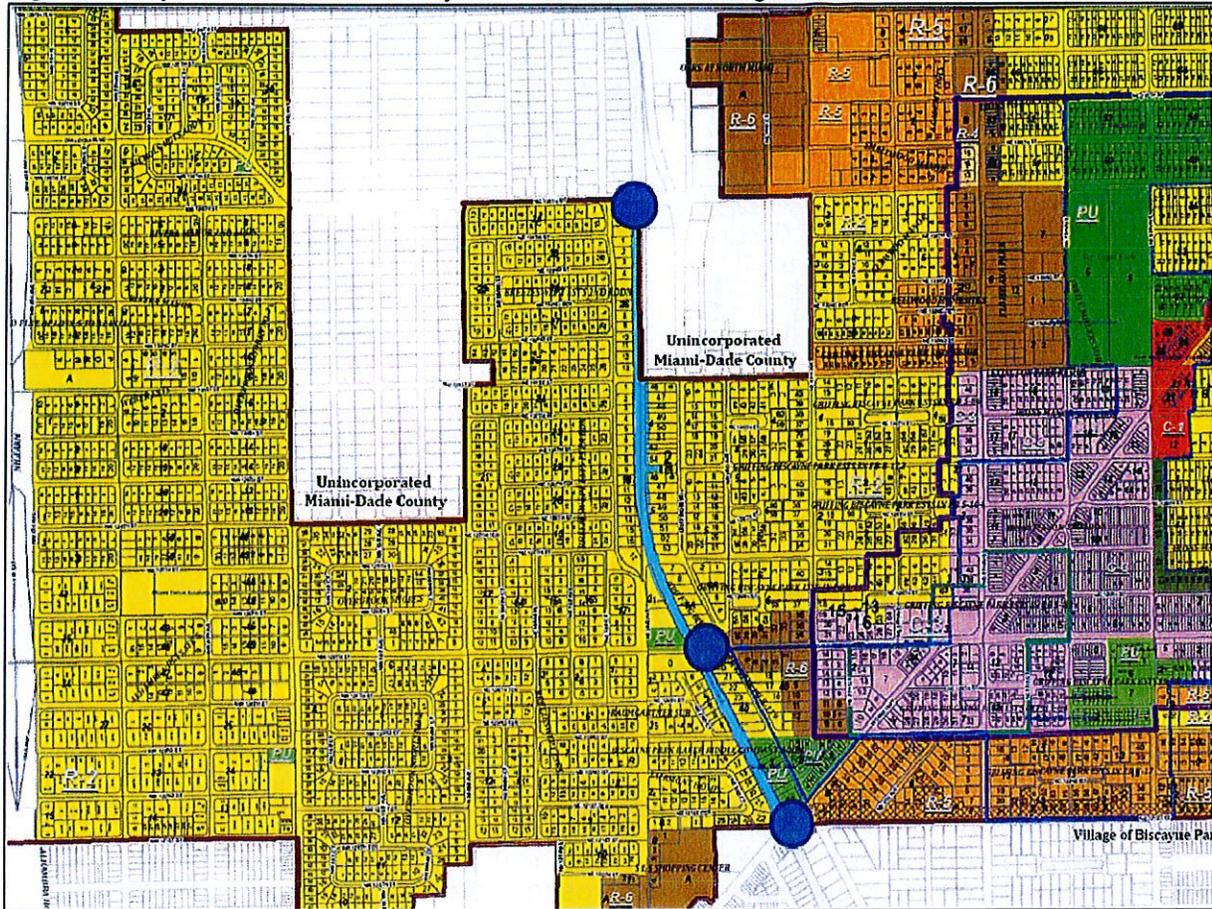
From a transportation and economic development perspective, the City of North Miami is divided into three or four major north-south subareas. The eastern subarea is bounded by Key Biscayne to the east and the FEC railroad corridor (which limits east-west connections) to the west. This subarea is dominated by US1 (Biscayne Blvd) which, together with 123<sup>rd</sup> Street, provides access to many of the more affluent neighborhoods/communities on both sides of Key Biscayne. The western subarea lies west of I-95, which effectively separates this subarea from the rest of the City. The center section of the City can be divided into two areas due in large part to the Biscayne Canal which limits east-west traffic.

Figure 3. Biscayne Canal Road Crossings.



As shown below, the City has only three (3) roads crossing the Canal: NE 135<sup>th</sup> Street, NE 125<sup>th</sup> Street and West Dixie Highway.

Figure 4. City of North Miami Biscayne Canal Road Crossings.



## DEMOGRAPHICS/HOUSING

The City of North Miami is virtually built-out with only a limited amount of vacant land available for development. Census estimates place the population of the City at 58,786 in 2010 a decline of 1,094 since 2000. The City boasts a rich ethnic mix with approximately 47% of the City's population being White, 41% Black, 2% Asian, 3% other and 7% multiracial. According to the 2006-2010 American Community Survey (ACS) 27% of the population noted their ancestry as **Hispanic or Latino**.

The median 2010 household income was \$42,526 increasing from \$29,778 in 2000. The City still has a relatively young population with the average age in 2010 of 36.4 years compared to 32 years in 2000.

According to the 2006-2010 American Community Survey (ACS), the City had 21,823 housing units of which 18,554 or 85% were occupied. In 2010 the homeowner vacancy rate was 5.7% and the

rental vacancy was 10.5% The City's overall housing stock is old with only 608 units (2.8%) built since 2000. Approximately 44% of the housing stock is over 60 years old.

**Table 1. North Miami Housing Age**

YEAR STRUCTURE BUILT	Estimate	+/- Error	Percentage
Total housing units	21,823	+/-673	21,823
Built 2005 or later	124	+/-76	0.6%
Built 2000 to 2004	484	+/-153	2.2%
Built 1990 to 1999	544	+/-202	2.5%
Built 1980 to 1989	1,568	+/-366	7.2%
Built 1970 to 1979	5,214	+/-537	23.9%
Built 1960 to 1969	4,217	+/-459	19.3%
Built 1950 to 1959	7,631	+/-484	35.0%
Built 1940 to 1949	1,559	+/-292	7.1%
Built 1939 or earlier	482	+/-178	2.2%

Source: 2006-2010 American Community Survey, US Department of Commerce, Census Bureau.

Approximately 40% of the City's housing stock is 1-unit detached housing. Slightly over 41% of housing is multi-family with buildings containing 20 or more units each. According to 2006-2010 ACS figures, the City has only 20 mobile homes.

**Table 2. North Miami Housing Structures**

UNITS IN STRUCTURE	Estimate	+/- Error	Percentage
Total housing units	21,823	+/-673	21,823
1-unit, detached	8,639	+/-443	39.6%
1-unit, attached	809	+/-198	3.7%
2 units	1,068	+/-209	4.9%
3 or 4 units	541	+/-163	2.5%
5 to 9 units	1,017	+/-232	4.7%
10 to 19 units	734	+/-214	3.4%
20 or more units	8,995	+/-525	41.2%
Mobile home	20	+/-28	0.1%
Boat, RV, van, etc.	0	+/-136	0.0%

Source: 2006-2010 American Community Survey, US Department of Commerce, Census Bureau.

### Tenure/Value/Rent

Of the City's occupied housings stock, 53.1% is owner occupied and 46.9% is rental according to 2010 Census figures. Approximately 39.5% of the occupants have moved in since 2005. Census estimates place the median value of owner occupied housing at \$220,700 in 2010 and median rent at \$947. The 2006-2010 ACS reports that 56.8% of renters apply 35% or more of their income on housing.

### Employment Characteristics/Commuting

2006-2010 ACS data estimates that 68.7% of the City's population 16 years and older are in the labor force of which 9.4% are unemployed.

Service occupations make up the largest segment (32.7%) of resident employment, followed by sales and office occupations (25%), management business, science and arts (19.9%), production, transportation and material moving (12.5%) and natural resources and construction (9.5%).

**Table 3. North Miami Resident Occupations**

OCCUPATION	Estimate	+/- Error	Percent
Civilian employed population 16 years and over	26,812	+/-1,073	26,812
Management, business, science, and arts occupations	5,348	+/-559	19.9%
Service occupations	8,765	+/-722	32.7%
Sales and office occupations	6,711	+/-622	25.0%
Natural resources, construction, and maintenance occupations	2,648	+/-456	9.9%
Production, transportation, and material moving occupations	3,340	+/-510	12.5%

Source: 2006-2010 American Community Survey, US Department of Commerce, Census Bureau.

The education, health care and social assistance sector represents the largest employment sector for North Miami residents (19.9%), followed by arts, entertainment and hospitality (15%); Professional, scientific, management (12.1%) and retail trade (11.9%).

**Table 4. North Miami Resident Industry Characteristics.**

INDUSTRY	Estimate	+/- Error	Percent
Civilian employed population 16 years and over	26,812	+/-1,073	26,812
Agriculture, forestry, fishing and hunting, and mining	134	+/-175	0.5%
Construction	1,956	+/-384	7.3%
Manufacturing	1,579	+/-330	5.9%
Wholesale trade	708	+/-219	2.6%
Retail trade	3,201	+/-538	11.9%
Transportation and warehousing, and utilities	2,152	+/-431	8.0%
Information	444	+/-165	1.7%
Finance and insurance, and real estate and rental and leasing	1,383	+/-281	5.2%
Professional, scientific, and management, and administrative and	3,252	+/-461	12.1%
Educational services, and health care and social assistance	5,336	+/-610	19.9%
Arts, entertainment, and recreation, and accommodation and food	4,015	+/-575	15.0%
Other services, except public administration	1,282	+/-324	4.8%
Public administration	1,370	+/-291	5.1%

Source: 2006-2010 American Community Survey, US Department of Commerce, Census Bureau.

Private wage and salary workers represent the largest class of city workers (82.2%), followed by government workers (11.8%) and self employed at 6%.

**Having reviewed the resident employment/occupation characteristics it is important to note that only 9.7% of the City's residents actually work within the City, according to 2006-2010 ACS data.**

## **ECONOMIC DEVELOPMENT FOUNDATIONS**

To a large degree, the economic foundation of the City lies in four areas: Downtown North Miami, the Biscayne Blvd (US 1) corridor, West Dixie Highway corridor, US 441 (NW 7<sup>th</sup> Avenue) and the SR 924 (NW 119<sup>th</sup> Street) corridors. The ULI report<sup>1</sup> notes that overall business (as measured by occupational licenses) has remained fairly stable over the years. The City has established an Enterprise Zone over most of the City making the corridors under evaluation eligible for the U.S. Small Business Administration Small Business HUD-ZONE program.

<sup>1</sup> Urban Land Institute, *Technical Assistance Panel for the North Miami Community Redevelopment Agency*, April 2009

### Downtown North Miami

Downtown North Miami or the Central Business District (CBD) forms the heart of the City. The downtown area largely comprises a mile long stretch of Main Street (SR 922 or NE 125<sup>th</sup> Street) and a half mile stretch of West Dixie Highway as shown in Figure 5. It is the home to government offices (City Hall, etc.) and the Museum of Contemporary Art (MOCA) located at the center of the CBD. MOCA is internationally recognized in the area of contemporary art and plans have been developed to increase its current building to 54,000 square feet with 23,150 feet of exhibit space. MOCA anchors a growing arts community in downtown and surrounding areas.



The remainder of downtown is largely smaller, locally owned retail space.

Given the constraints of the existing roadway, Main Street (SR 922/NE 125<sup>th</sup> Street) had 34,000 Average Annual Daily Traffic (AADT) in 2010, down from a high of 39,472 AADT in 2008.

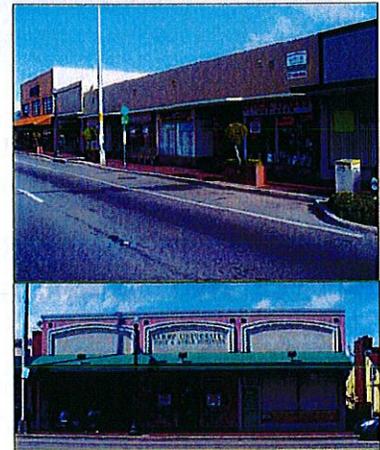


Figure 5. Downtown North Miami.



Located south of Downtown and just over the City's southern boundary is Barry University which currently enrolls 2,737 full time undergraduate students and 4,187 graduate students. The University maintains 10 dormitory "Halls" as well as some off-campus housing.

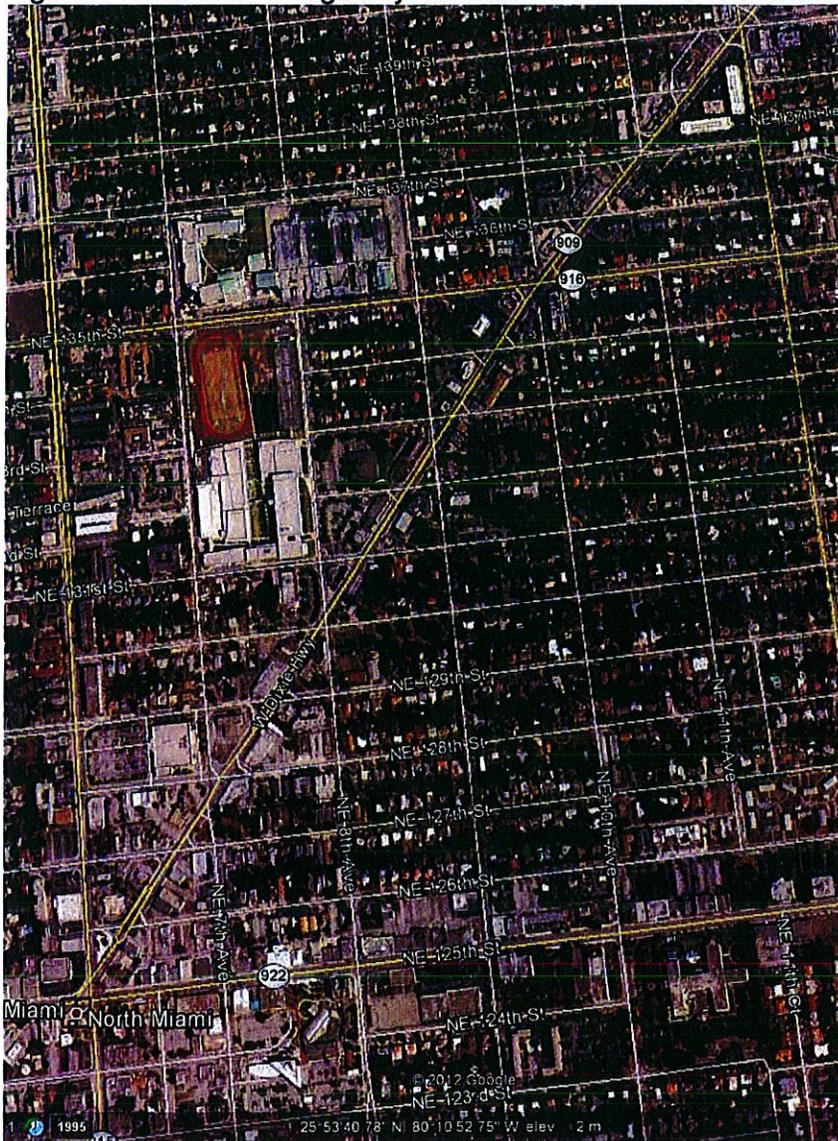
### **Biscayne Boulevard Corridor**

The Biscayne Boulevard corridor appears to be the major employment generator in the City and is the home to a host of upper-end retail shops and some office buildings, catering to the upper-scale clientele from surrounding neighborhoods/communities including Bay Harbor and immediate beach communities. While not shown on Figure 6, the Biscayne Boulevard corridor extends northward and includes the Florida International University's (FIU) Biscayne Campus, which is a large commuter university. The corridor also includes the internationally recognized Johnson & Wales University offering Culinary and Hospitality Management degrees.

The corridor in proximity to NE 123<sup>rd</sup> Street averaged 48,000 AADT in 2010 down from 54,000 ADT in 2004.



Figure 7. West Dixie Highway Corridor



Within the City of North Miami, West Dixie Highway, shown in Figure 7 above, has not achieved the successful redevelopment that Biscayne Boulevard has enjoyed. The corridor represents older mixed retail stores with limited frontage and parking. The existing system, especially the five point's area (Figure 8), has limited the use of the corridor as an arterial servicing the larger Broward, Miami community. AADT averaged 23,000 vehicles in 2010 down from 27,000 in 2002.<sup>2</sup>

<sup>2</sup> Taken at West Dixie Hwy and 135 Street.



Figure 9. NE 7<sup>th</sup> Avenue/US441 Corridor



## RETAIL GAP ANALYSIS

The Community Redevelopment Authority commissioned a retail gap analysis of its redevelopment area by Buxton, Inc. in 2009. The report was derived prior to the formal collapse of the Biscayne Landing Project and the full impact of the “Great Recession”<sup>3</sup>. For the purposes of this evaluation,

<sup>3</sup> The United States went through its longest, and by most measures worst economic recession since the Great Depression between December 2007 and June 2009, although it continued in the State of Florida until late 2011.

SPG commissioned several corridor level analyses from Claritas, Inc. (the same source as the Buxton report) to determine retail market vitality. Per agreement with the City, three different market areas were analyzed based on the following intersections: US 441/NW 120<sup>th</sup> Street (using 1, 3, 5-mile radii), West Dixie Highway/NE 125<sup>th</sup> Street (using 1, 2, 3-mile radii), and Biscayne Blvd/NE 123<sup>rd</sup> Street (using 1, 3, 5-mile radii).

A Gap Analysis estimates the amount of residential expenditures emanating from a predefined market or service area and then compares it to the amount of retail revenues (in this case by store type) within that predefined market or service area. If residential expenditures exceed store revenues then the service area is deemed to have a retail gap or the prospect that additional retail store demand maybe available. Most gap analyses use three increasing larger service areas (1, 3, 5 mile radii) in order to determine if this possible store demand is actually captured by stores slightly outside the original service area; thereby effectively eliminating the gap. If there are more retail store sales (revenue) then resident expenditures, then there is presumed to be a surplus of stores within the service area.

**NW 7<sup>th</sup> Avenue (US 441)/NW 119<sup>th</sup> Street Service Area**

As discussed above, SPG commissioned a Retail Gap analysis for three market areas (1, 3, 5 mile) focusing on the intersection of NW 7<sup>th</sup> Avenue (US 441) and NW 119<sup>th</sup> Street. The market area includes two of the evaluation corridors: 7<sup>th</sup> Avenue (US 441) and NW 119<sup>th</sup> Street (SR 924).

Figure 10. NW 7<sup>th</sup> Avenue and NW 119<sup>th</sup> Street Market Area



As shown in Table 5, the NW 7<sup>th</sup> Avenue and NW 119<sup>th</sup> Street corridors have several retail gaps at the 1-mile market area; that said, with the exception of Motor Vehicle and Parts, the gap is relatively small. The NW 7<sup>th</sup> Avenue corridor is not well situated to capture retail opportunities due to the

constraints of I-95 (limiting available east west linkages) which effectively cuts the market area in half.

**Table 5. US 441 (NW 7<sup>th</sup> Avenue) and SR 924 (NW 119<sup>th</sup> Street) Corridor 1-mile Radii Market**

	2011 Demand	2011 Supply	Opportunity
	(Consumer Expenditures) (Retail Sales) Gap/Surplus		
Radius 1: , 0.00 - 1.00 Miles, Total			
Motor Vehicle and Parts Dealers-441	\$28,653,934	\$13,650,528	\$15,003,406
Furniture and Home Furnishings Stores-442	\$3,582,475	\$2,152,797	\$1,429,678
Electronics and Appliance Stores-443	\$4,199,625	\$3,521,048	\$678,577
Building Material, Garden Equip Stores -444	\$16,947,240	\$15,187,809	\$1,759,431
Food and Beverage Stores-445	\$33,602,912	\$38,180,499	-\$4,577,587
Health and Personal Care Stores-446	\$15,868,809	\$18,775,331	-\$2,906,522
Gasoline Stations-447	\$21,028,140	\$28,527,777	-\$7,499,637
Clothing and Clothing Accessories Stores-448	\$12,424,678	\$8,031,420	\$4,393,258
Sporting Goods, Hobby, Book, Music Stores-451	\$3,830,254	\$2,299,549	\$1,530,705
General Merchandise Stores-452	\$33,786,658	\$52,424,880	-\$18,638,222
Miscellaneous Store Retailers-453	\$4,938,401	\$2,160,936	\$2,777,465
Non-Store Retailers-454	\$17,395,165	\$10,276,980	\$7,118,185
Foodservice and Drinking Places-722	\$20,737,648	\$17,475,506	\$3,262,142
GAFO *	\$59,695,630	\$68,822,273	-\$9,126,643
<b>Total Retail Sales Incl Eating and Drinking Places</b>	<b>\$216,995,939</b>	<b>\$212,665,060</b>	<b>\$4,330,879</b>

The 3-mile Radii market appears to have significant retail gaps or retail opportunities. The largest being General Merchandise stores. However, the market segment is traditionally found in department stores and not particularly suited for either corridor. It should also be noted that I-95 effectively cuts this market in half.

**Table 6. US 441 (NW 7<sup>th</sup> Avenue) and SR 924 (NW 119<sup>th</sup> Street) Corridor 3-mile Radii Market**

	2011 Demand	2011 Supply	Opportunity
	(Consumer Expenditures) (Retail Sales) Gap/Surplus		
Radius 2: , 0.00 - 3.00 Miles, Total			
Motor Vehicle and Parts Dealers-441	\$251,518,976	\$388,553,569	-\$137,034,593
Furniture and Home Furnishings Stores-442	\$32,492,819	\$34,913,500	-\$2,420,681
Electronics and Appliance Stores-443	\$38,187,347	\$46,864,644	-\$8,677,297
Building Material, Garden Equip Stores -444	\$145,584,735	\$130,100,685	\$15,484,050
Food and Beverage Stores-445	\$280,261,643	\$347,369,309	-\$67,107,666
Health and Personal Care Stores-446	\$130,559,541	\$161,872,929	-\$31,313,388
Gasoline Stations-447	\$187,818,881	\$161,351,715	\$26,467,166
Clothing and Clothing Accessories Stores-448	\$102,326,995	\$38,613,388	\$63,713,607
Sporting Goods, Hobby, Book, Music Stores-451	\$33,954,266	\$23,425,026	\$10,529,240
General Merchandise Stores-452	\$280,440,612	\$129,307,425	\$151,133,187
Miscellaneous Store Retailers-453	\$43,651,607	\$33,158,894	\$10,492,713
Non-Store Retailers-454	\$148,830,394	\$63,466,821	\$85,363,573
Foodservice and Drinking Places-722	\$191,824,438	\$151,573,796	\$40,250,642
GAFO *	\$504,349,588	\$291,119,706	\$213,229,882
<b>Total Retail Sales Incl Eating and Drinking Places</b>	<b>\$1,867,452,256</b>	<b>\$1,710,571,701</b>	<b>\$156,880,555</b>

Most of the Gaps identified within the 3-mile radii market have been satisfied at the larger 5-mile radii, meaning that stores located within the 5-mile radii serve both the 3 and 1-mile radii residents. The main opportunities are within the Building Materials, Garden stores and Gasoline stations.

**Table 7. US 441 (NW 7<sup>th</sup> Avenue) and SR 924 (NW 119<sup>th</sup> Street) Corridor 3-mile Radii Market**

Radius 3: , 0.00 - 5.00 Miles, Total	2011 Demand (Consumer Expenditures)	2011 Supply (Retail Sales)	Opportunity Gap/Surplus
Motor Vehicle and Parts Dealers-441	\$641,387,224	\$1,074,434,952	-\$433,047,728
Furniture and Home Furnishings Stores-442	\$82,822,810	\$301,734,369	-\$218,911,559
Electronics and Appliance Stores-443	\$96,366,222	\$154,318,036	-\$57,951,814
Building Material, Garden Equip Stores -444	\$370,055,949	\$324,692,672	\$45,363,277
Food and Beverage Stores-445	\$700,173,409	\$848,740,355	-\$148,566,946
Health and Personal Care Stores-446	\$335,875,893	\$451,143,684	-\$115,267,791
Gasoline Stations-447	\$467,512,068	\$434,672,990	\$32,839,078
Clothing and Clothing Accessories Stores-448	\$249,367,203	\$262,613,782	-\$13,246,579
Sporting Goods, Hobby, Book, Music Stores-451	\$84,101,798	\$82,079,041	\$2,022,757
General Merchandise Stores-452	\$695,470,611	\$574,815,586	\$120,655,025
Miscellaneous Store Retailers-453	\$109,463,409	\$107,362,256	\$2,101,153
Non-Store Retailers-454	\$374,769,431	\$121,220,272	\$253,549,159
Foodservice and Drinking Places-722	\$487,576,214	\$460,553,179	\$27,023,035
GAFO *	\$1,251,107,817	\$1,420,817,140	-\$169,709,323
Total Retail Sales Incl Eating and Drinking Places	\$4,694,942,241	\$5,198,381,173	-\$503,438,932

## Summary

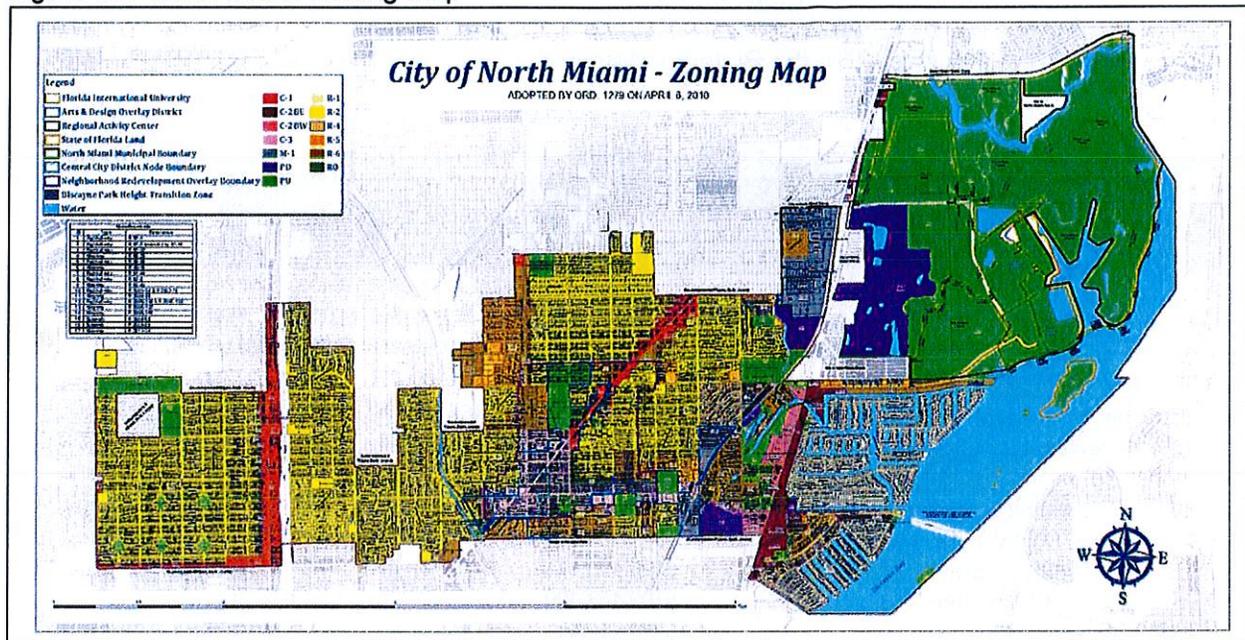
### NW 7<sup>th</sup> Avenue Corridor (US 441)

The NW 7<sup>th</sup> Avenue Corridor has been significantly impacted by the construction of the Interstate. The interchanges just north of the evaluation area have effectively eliminated the historic traffic coming from the north, while the Interstate itself has all but blocked east-west connection with the exception of five streets (143<sup>rd</sup>, 135<sup>th</sup>, 131<sup>st</sup>, 125<sup>th</sup>, and 119<sup>th</sup>). Much of the eastern portion of the corridor appears to date the construction of the Interstate and is now land locked. The western portion of the corridor suffers from limited lot depths sufficient to generate critical demand.

The main potential areas for development or activity nodes centered where there is access to the Interstate (Opa Locka/135<sup>th</sup> Street, 125<sup>th</sup> Street, and 119<sup>th</sup> Street) and/or where east-west connections are available 143<sup>rd</sup>, 135<sup>th</sup>, 131<sup>st</sup>, 125<sup>th</sup>, and 119<sup>th</sup>).

As shown in Figure 11, the corridor is both zoned, as well as identified on the Future Land Use Map, as commercial/office. While the corridor does have some retail, it is older and underperforming, the exceptions being the active nodes describe above. It is recommended that the City explore the opportunity to allow the commercial corridor to expand on its western side to cover at least a full block as well as allow for light industrial/distribution. As will be discussed later, much of the City's existing industrial properties along the FEC rail corridor might be better served as mixed/Transit Oriented Design (TOD) development, leaving the City with few areas that can handle distribution/flex space/light industrial.

Figure 11. North Miami Zoning Map



**NW 119th Avenue Corridor (SR 924)**

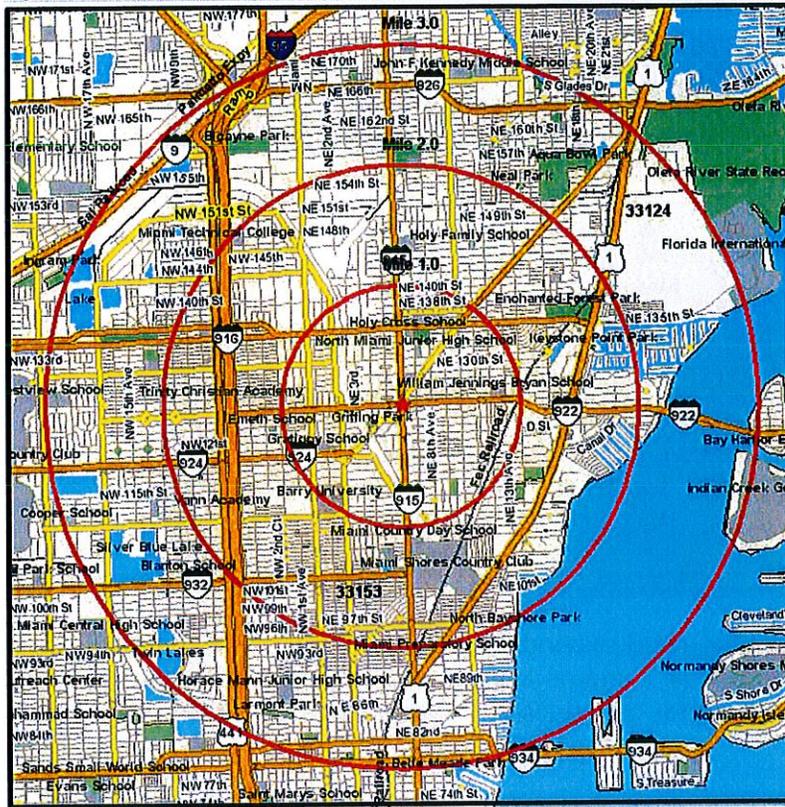
As previously discussed, the NW 119<sup>th</sup> Avenue corridor (of which only the northern portion falls within the City of North Miami), shares much of the NW 7<sup>th</sup> Avenue market. SR 924 is a major highway linking the eastern part of the County to its western communities and the Palmetto Expressway (135<sup>th</sup> Street also provides a similar connection). As designed, it primarily serves through traffic, with little orientation to community level retail. The corridor is undergoing redesign which would entail a new elevated highway connection to I-95. Should this occur, those businesses affected by the elevated highway could be significantly impacted. FDOT and MDX have contracted with the University of South Florida (CUTR) to document the impacts. This evaluation should be available in early summer 2012.

**West Dixie Highway (Downtown) Market Area**

The West Dixie Highway has historically served as one of the major north-south arterials of the City and areas within Miami-Dade County. As previously discussed, parts of its western market are impacted by the Biscayne Canal and the FEC railroad, both of which limit east-west connections. The corridor appearance needs to be updated/redeveloped. Much of the historic frontage parking seems to have been eliminated or reduced as the Highway right-of-way was expanded. It should be noted that its market area overlaps the Main Street/Downtown corridor and the NE 6<sup>th</sup> Avenue corridor.

Both market areas are also impacted by the Biscayne Boulevard corridor to the east, which will be discussed later in this report; as that corridor is now the primary north-south retail market for this part of Miami-Dade County.

Figure 12. West Dixie Highway Corridor Market Area



Care should be taken in understanding the 2 and 3-mile market areas as the limited east-west connections will diminish the effective market penetration to the west.

Table 8 below, shows the potential retail gaps of the immediate 1-mile radii market. Potential retail gaps or opportunities exist primarily for building supplies, gas stations, food/drinking, clothing and miscellaneous retail.

Table 8. West Dixie Highway Corridor 1-mile Radii Market

	2011 Demand (Consumer Expenditures)	2011 Supply (Retail Sales)	Opportunity Gap/Surplus
Radius 1: 0.00 - 1.00 Miles, Total			
Motor Vehicle and Parts Dealers-441	\$37,411,387	\$14,454,265	\$22,957,122
Furniture and Home Furnishings Stores-442	\$4,838,724	\$3,340,142	\$1,498,582
Electronics and Appliance Stores-443	\$5,869,007	\$16,149,567	-\$10,280,560
Building Material, Garden Equip Stores -444	\$21,514,727	\$1,975,723	\$19,539,004
Food and Beverage Stores-445	\$42,994,453	\$55,285,432	-\$12,290,979
Health and Personal Care Stores-446	\$19,019,598	\$27,976,775	-\$8,957,177
Gasoline Stations-447	\$29,334,569	\$15,852,028	\$13,482,541
Clothing and Clothing Accessories Stores-448	\$15,627,593	\$8,516,666	\$7,110,927
Sporting Goods, Hobby, Book, Music Stores-451	\$5,268,039	\$5,889,258	-\$621,219
General Merchandise Stores-452	\$42,649,917	\$67,407,085	-\$24,757,168
Miscellaneous Store Retailers-453	\$6,788,856	\$5,547,494	\$1,241,362
Non-Store Retailers-454	\$22,525,029	\$9,776,443	\$12,748,586
Foodservice and Drinking Places-722	\$30,432,744	\$18,008,872	\$12,423,872
GAFO *	\$76,866,331	\$102,375,275	-\$25,508,944
Total Retail Sales Incl Eating and Drinking Places	\$284,274,645	\$250,179,749	\$34,094,896

At the 2-mile radii market, potential retail opportunities increase for gas stations, clothing, food/drinking, general merchandise, and sporting goods as shown in Table 9.

**Table 9. West Dixie Highway Corridor 2-mile Radii Market**

	2011 Demand (Consumer Expenditures)	2011 Supply (Retail Sales)	Opportunity Gap/Surplus
<b>Radius 1: , 0.00 - 2.00 Miles, Total</b>			
Motor Vehicle and Parts Dealers-441	\$145,795,176	\$130,211,640	\$15,583,536
Furniture and Home Furnishings Stores-442	\$19,306,835	\$30,526,187	-\$11,219,352
Electronics and Appliance Stores-443	\$22,386,312	\$36,810,506	-\$14,424,194
Building Material, Garden Equip Stores -444	\$85,523,190	\$104,752,913	-\$19,229,723
Food and Beverage Stores-445	\$154,460,214	\$168,114,713	-\$13,654,499
Health and Personal Care Stores-446	\$71,798,281	\$118,626,122	-\$46,827,841
Gasoline Stations-447	\$105,507,899	\$74,871,540	\$30,636,359
Clothing and Clothing Accessories Stores-448	\$57,209,304	\$28,546,641	\$28,662,663
Sporting Goods, Hobby, Book, Music Stores-451	\$19,957,536	\$15,604,140	\$4,353,396
General Merchandise Stores-452	\$155,689,378	\$149,949,503	\$5,739,875
Miscellaneous Store Retailers-453	\$25,504,417	\$24,907,096	\$597,321
Non-Store Retailers-454	\$84,432,315	\$42,150,096	\$42,282,219
Foodservice and Drinking Places-722	\$112,237,622	\$99,000,304	\$13,237,318
GAFO *	\$284,618,850	\$274,661,766	\$9,957,084
<b>Total Retail Sales Incl Eating and Drinking Places</b>	<b>\$1,059,808,478</b>	<b>\$1,024,071,401</b>	<b>\$35,737,077</b>

It appears that a significant amount of the retail expenditures (demand) of those residing within the 2-mile radii market actually purchase goods in stores located within the 3-mile radii market. That said, it appears that opportunities do exist for gas stations, clothing and sporting/hobby/book/music stores as shown in Table 10.

**Table 10. West Dixie Highway Corridor 3-mile Radii Market**

	2011 Demand (Consumer Expenditures)	2011 Supply (Retail Sales)	Opportunity Gap/Surplus
<b>Radius 1: , 0.00 - 3.00 Miles, Total</b>			
Motor Vehicle and Parts Dealers-441	\$256,377,274	\$427,605,559	-\$171,228,285
Furniture and Home Furnishings Stores-442	\$33,602,854	\$113,476,185	-\$79,873,331
Electronics and Appliance Stores-443	\$38,948,297	\$99,018,885	-\$60,070,588
Building Material, Garden Equip Stores -444	\$148,696,976	\$165,006,132	-\$16,309,156
Food and Beverage Stores-445	\$274,551,182	\$320,462,317	-\$45,911,135
Health and Personal Care Stores-446	\$127,692,862	\$234,197,891	-\$106,505,029
Gasoline Stations-447	\$186,526,836	\$160,160,922	\$26,365,914
Clothing and Clothing Accessories Stores-448	\$101,226,801	\$79,712,301	\$21,514,500
Sporting Goods, Hobby, Book, Music Stores-451	\$34,572,599	\$29,773,208	\$4,799,391
General Merchandise Stores-452	\$275,958,914	\$278,477,296	-\$2,518,382
Miscellaneous Store Retailers-453	\$44,391,602	\$47,014,455	-\$2,622,853
Non-Store Retailers-454	\$148,440,834	\$59,837,092	\$88,603,742
Foodservice and Drinking Places-722	\$195,787,653	\$209,325,772	-\$13,538,119
GAFO *	<u>\$501,747,792</u>	<u>\$624,138,112</u>	<u>-\$122,390,320</u>
<b>Total Retail Sales Incl Eating and Drinking Places</b>	<b>\$1,866,774,683</b>	<b>\$2,224,068,014</b>	<b>-\$357,293,331</b>

Within these groups, and shown within the appendix to this report, specific sub retail store types show promise. This includes: family clothing, sporting goods stores, hardware stores, lawn and garden stores, beer/wine shops, and other general merchandise stores.

**Summary**

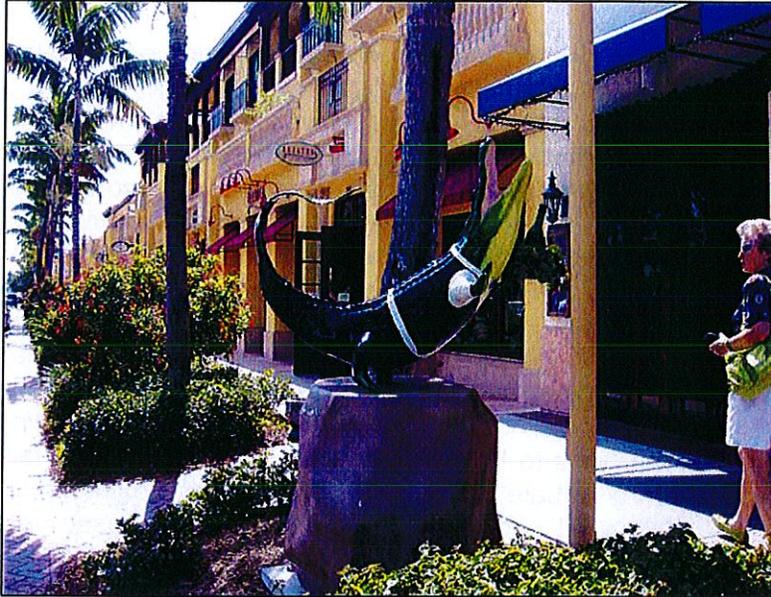
The West Dixie Highway/Downtown Main Street markets show potential opportunities for a limited amount of locally derived retail. That stated the area is attracting a more regional clientele as a result of the MOCA, expanding arts/gallery and furniture markets. These anchors should in turn attract more retail traffic to the downtown. As reported in the ULI report, it is important to increase the regional draw of the downtown in order to increase demand and rents (which according to the ULI report are in the \$10-\$15 range). SPG believes that several factors impede development. First, downtown is not visible to outside residents and even some of the City’s own residents especially those that do not utilize services available through the local government offices (City Hall or Police Station). With the exception of MOCA, the downtown is not an end-destination. In its current form, the downtown has not achieved the necessary critical mass to establish itself as an end-destination. As also pointed out in the ULI report, efforts need to be made to continue improving the physical presence of the area. While a lot of effort has been made to improve the area; downtown still appears outdated. Lack of perceived parking needs to be addressed as well as continued façade improvements. While there appears to be a debate as to the best façade treatment to be encouraged, SPG suggests that part of the overall effort needs to encourage increased vertical presence and density. An example would be Naples, whose old downtown is not that dissimilar with North Miami, yet with new zoning and architectural design standards, it totally revamped itself (prior to the 2002-2006 building boom).

Figures 13 and 14 show the City of Naples before and after of this more intense mixed use type of its successful redevelopment efforts.

Figure 13. Old Naples Downtown (example)



Figure 14. New Naples Downtown (increased density and vertical presence)



The City does not seem to have captured any of the student market generated by FIU, Johnson & Wales or Barry University. Efforts should be explored to offer retail oriented stores that cater to this clientele as well as exploring ways to encourage the development of student housing. One approach is to use second floor space were available and by encouraging more mixed use development downtown.

### **Biscayne Boulevard Corridor Market Area**

The Biscayne Boulevard corridor, due in large part to its connectivity to the more affluent coastal neighborhoods/communities, is a thriving retail and to a lesser extent immersing office location. Most of its retail is in smaller upper end strip developments. The corridor is home to a major regional Lexus dealership and the home to a new regional Fiat dealership. Although anchored to the north by FIU, this commuter campus seems to have little student interaction with the corridor's retail stores. Likewise, it appears that Johnson & Wales University, while having on-site student housing also has had a minimum impact of the corridor. The corridor backs up to the FEC railroad (Figure 6) and while parts of the western portion are zoned industrial, its uses are at best light industrial but also include a car museum and other retail oriented uses.

While a traditional retail gap analysis was run for the corridor, the primary market for the corridor is regional including the beachfront communities. It should be noted that the 1-mile radii market for Biscayne Boulevard overlaps the 1-mile radii market of the West Dixie/Downtown market area. As shown in Table 11, the immediate 1-mile radii residential market shows potential retail opportunities for gas stations, clothing, sporting good, hobby shops and music stores. It also shows demand for non-store retail which will not be analyzed here as it would have limited impact of the redevelopment of the area.

Figure 15. Biscayne Boulevard Corridor Market Area



Table 11. Biscayne Boulevard Corridor 1-Mile Radii Market

Radius 1: , 0.00 - 1.00 Miles, Total	2011 Demand sumer Expenditt	2011 Supply (Retail Sales)	Opportunity Gap/Surplus
Motor Vehicle and Parts Dealers-441	\$44,672,733	\$113,098,118	-\$68,425,385
Furniture and Home Furnishings Stores-442	\$6,419,244	\$5,935,785	\$483,459
Electronics and Appliance Stores-443	\$7,174,482	\$20,880,559	-\$13,706,077
Building Material, Garden Equip Stores -444	\$27,484,464	\$75,832,223	-\$48,347,759
Food and Beverage Stores-445	\$46,078,550	\$65,158,507	-\$19,079,957
Gasoline Stations-447	\$33,141,839	\$14,230,760	\$18,911,079
Clothing and Clothing Accessories Stores-448	\$16,554,396	\$7,896,149	\$8,658,247
Sporting Goods, Hobby, Book, Music Stores-451	\$6,158,107	\$4,825,666	\$1,332,441
General Merchandise Stores-452	\$46,009,499	\$52,934,020	-\$6,924,521
Miscellaneous Store Retailers-453	\$8,116,908	\$18,400,997	-\$10,284,089
Non-Store Retailers-454	\$25,962,427	\$15,593,853	\$10,368,574
Foodservice and Drinking Places-722	\$36,823,335	\$58,269,770	-\$21,446,435
GAFO *	\$85,590,287	\$104,611,258	-\$19,020,971
<b>Total Retail Sales Incl Eating and Drinking Places</b>	<b>\$326,612,265</b>	<b>\$504,560,114</b>	<b>-\$177,947,849</b>

At the 3-mile radii, as shown in Table 12, the market area taps the surrounding affluent neighborhoods/communities which generate significant potential retail opportunities for building material/garden stores, food and beverage stores, gasoline stations, sporting goods and hobby/music stores, and restaurants/drinking places.

**Table 12. Biscayne Boulevard Corridor 3-Mile Radii Market**

Radius 2: , 0.00 - 3.00 Miles, Total	2011 Demand sumer Expenditu	2011 Supply (Retail Sales)	Opportunity Gap/Surplus
Motor Vehicle and Parts Dealers-441	\$254,715,000	\$275,955,266	-\$21,240,266
Furniture and Home Furnishings Stores-442	\$35,214,249	\$110,535,918	-\$75,321,669
Electronics and Appliance Stores-443	\$39,601,082	\$84,587,559	-\$44,986,477
Building Material, Garden Equip Stores -444	\$152,181,324	\$108,594,328	\$43,586,996
Food and Beverage Stores-445	\$260,883,892	\$224,970,401	\$35,913,491
Health and Personal Care Stores-446	\$125,951,308	\$202,404,470	-\$76,453,162
Gasoline Stations-447	\$178,919,375	\$102,401,161	\$76,518,214
Clothing and Clothing Accessories Stores-448	\$95,456,325	\$205,040,912	-\$109,584,587
Sporting Goods, Hobby, Book, Music Stores-451	\$34,589,614	\$23,885,305	\$10,704,309
General Merchandise Stores-452	\$262,581,716	\$307,451,529	-\$44,869,813
Non-Store Retailers-454	\$146,609,763	\$395,054,496	-\$248,444,733
Foodservice and Drinking Places-722	\$199,236,054	\$187,708,851	\$11,527,203
GAFO *	\$485,437,459	\$752,810,894	-\$267,373,435
<b>Total Retail Sales Incl Eating and Drinking Places</b>	<b>\$1,830,240,446</b>	<b>\$2,275,416,257</b>	<b>-\$445,175,811</b>

As shown in Table 13, some of the opportunities (gap) found within the 3-mile radii market is satisfied or met within the large 5-mile radii market. However, several sectors still show significant potential opportunities including building material and garden stores, gasoline stations and general merchandise (although general merchandise is using part of the good sold in department stores).

**Table 13. Biscayne Boulevard Corridor 5-Mile Radii Market**

Radius 3: , 0.00 - 5.00 Miles, Total	2011 Demand sumer Expenditu	2011 Supply (Retail Sales)	Opportunity Gap/Surplus
Motor Vehicle and Parts Dealers-441	\$625,738,980	\$720,752,980	-\$95,014,000
Furniture and Home Furnishings Stores-442	\$89,516,926	\$169,319,042	-\$79,802,116
Electronics and Appliance Stores-443	\$99,117,902	\$147,787,514	-\$48,669,612
Building Material, Garden Equip Stores -444	\$388,956,845	\$250,175,302	\$138,781,543
Food and Beverage Stores-445	\$668,706,233	\$850,280,598	-\$181,574,365
Health and Personal Care Stores-446	\$336,426,442	\$434,308,298	-\$97,881,856
Gasoline Stations-447	\$452,010,290	\$320,437,202	\$131,573,088
Clothing and Clothing Accessories Stores-448	\$234,652,225	\$398,208,698	-\$163,556,473
Sporting Goods, Hobby, Book, Music Stores-451	\$84,700,094	\$88,849,536	-\$4,149,442
General Merchandise Stores-452	\$665,040,857	\$507,979,644	\$157,061,213
Non-Store Retailers-454	\$373,959,931	\$536,619,223	-\$162,659,292
Foodservice and Drinking Places-722	\$502,118,393	\$555,516,412	-\$53,398,019
GAFO *	\$1,218,367,841	\$1,360,996,032	-\$142,628,191
<b>Total Retail Sales Incl Eating and Drinking Places</b>	<b>\$4,632,603,380</b>	<b>\$5,077,094,250</b>	<b>-\$444,490,870</b>

As previously noted, there is a significant overlap between the West Dixie Highway/Downtown and Biscayne Boulevard markets. It would help the City if this connection or overlap could be strengthened.

There appears to be a real possibility that a new passenger rail service will emerge on the FEC line and that a Depot will be built on 125<sup>th</sup> Street/Main Street, in proximity to where the old Arch Creek Railroad Depot was located. A new passenger Station could have a significant impact on the City by providing another direct transportation linkage to the surrounding region, especially given the

forecast of rising gasoline prices. Due to the Station's location and close proximity to Downtown and the Biscayne Boulevard corridor, the City should consider the redevelopment potential of the surrounding properties and plan for extended TOD development.

### Summary

Biscayne Boulevard is a thriving corridor, with only a limited amount of land for redevelopment/development. While it is a significant part of the City's image and revenue stream, it does not significantly interact with the City's economic structure in terms of spin off impacts outside of its corridor. One major economic development opportunity is greater connectivity with FIU primarily by providing student housing in the immediate vicinity of the campus and/or new Rail Depot. As mentioned in the ULI report the same can be said of Johnson & Wales.

The redevelopment of the City could be significantly and positively impacted should the FEC passenger rail and development of a depot at NE 125<sup>th</sup> Street. This anchor could provide the demand to allow the surrounding land to be developed into higher density TOD developments. This type of development, if zoned and planned properly could provide the 24/7 retail demand needed for downtown redevelopment while providing a direct linkage and gateway to the Biscayne Boulevard market as well as a southern gateway to capture part of the Barry University market.

The Appendix to this report is found on the following pages. The results of the detailed Gap evaluation for all market radii are presented.



**APPENDIX**

**7TH AVENUE AND 119TH STREET CORRIDORS GAP ANALYSIS**

**RMP Opportunity Gap - Retail Stores**

US441 and NW 125th St

Radius 1: , 0.00 - 1.00 Miles, Total

	2011 Demand (Consumer Expenditures)	2011 Supply (Retail Sales)	Opportunity Gap/Surplus
<b>Total Retail Sales Incl Eating and Drinking Places</b>	216,995,939	212,665,060	4,330,879
<b>Motor Vehicle and Parts Dealers-441</b>	28,653,934	13,650,528	15,003,406
Automotive Dealers-4411	26,238,280	6,635,231	19,603,049
Other Motor Vehicle Dealers-4412	442,855	2,871,812	(2,428,957)
Automotive Parts/Access, Tire Stores-4413	1,972,799	4,143,486	(2,170,687)
<b>Furniture and Home Furnishings Stores-442</b>	3,582,475	2,152,797	1,429,678
Furniture Stores-4421	1,878,491	1,393,725	484,766
Home Furnishing Stores-4422	1,703,984	759,073	944,911
<b>Electronics and Appliance Stores-443</b>	4,199,625	3,521,048	678,577
Appliances, TV's, Electronics Stores-44311	3,081,531	3,521,048	(439,517)
Household Appliances Stores-443111	727,715	626,640	101,075
Radio, Television, Electronics Stores-443112	2,353,815	2,894,408	(540,593)
Computer and Software Stores-44312	924,020	0	924,020
Camera and Photographic Equipment Stores-44313	194,074	0	194,074
<b>Building Material, Garden Equip Stores -444</b>	16,947,240	15,187,809	1,759,431
Building Material and Supply Dealers-4441	15,390,428	15,187,809	202,619
Home Centers-44411	6,258,633	0	6,258,633
Paint and Wallpaper Stores-44412	359,427	663,716	(304,289)
Hardware Stores-44413	1,661,225	0	1,661,225
Other Building Materials Dealers-44419	7,111,145	14,524,093	(7,412,948)
Building Materials, Lumberyards-444191	2,447,930	5,678,917	(3,230,987)
Lawn, Garden Equipment, Supplies Stores-4442	1,556,812	0	1,556,812
Outdoor Power Equipment Stores-44421	73,230	0	73,230
Nursery and Garden Centers-44422	1,483,582	0	1,483,582
<b>Food and Beverage Stores-445</b>	33,602,912	38,180,499	(4,577,587)
Grocery Stores-4451	31,156,891	37,630,793	(6,473,902)
Supermarkets, Grocery (Ex Conv) Stores-44511	29,781,907	35,525,233	(5,743,326)
Convenience Stores-44512	1,374,984	2,105,561	(730,577)
Specialty Food Stores-4452	1,008,002	98,047	909,955
Beer, Wine and Liquor Stores-4453	1,438,019	451,658	986,361
<b>Health and Personal Care Stores-446</b>	15,868,809	18,775,331	(2,906,522)
Pharmacies and Drug Stores-44611	13,683,264	17,519,055	(3,835,791)
Cosmetics, Beauty Supplies, Perfume Stores-44612	581,719	808,738	(227,019)
Optical Goods Stores-44613	566,569	226,085	340,484
Other Health and Personal Care Stores-44619	1,037,257	221,452	815,805

## RMP Opportunity Gap - Retail Stores

US441 and NW 125th St

Radius 1: , 0.00 - 1.00 Miles, Total

	2011 Demand (Consumer Expenditures)	2011 Supply (Retail Sales)	Opportunity Gap/Surplus
Gasoline Stations-447	21,028,140	28,527,777	(7,499,637)
Gasoline Stations With Conv Stores-44711	15,769,745	25,218,969	(9,449,224)
Other Gasoline Stations-44719	5,258,394	3,308,808	1,949,586
<b>Clothing and Clothing Accessories Stores-448</b>	<b>12,424,678</b>	<b>8,031,420</b>	<b>4,393,258</b>
Clothing Stores-4481	9,394,882	5,212,779	4,182,103
Men's Clothing Stores-44811	545,794	201,117	344,677
Women's Clothing Stores-44812	2,441,549	4,256,332	(1,814,783)
Childrens, Infants Clothing Stores-44813	578,302	661,731	(83,429)
Family Clothing Stores-44814	4,977,537	56,841	4,920,696
Clothing Accessories Stores-44815	213,053	0	213,053
Other Clothing Stores-44819	638,648	36,758	601,890
Shoe Stores-4482	2,047,673	2,681,299	(633,626)
Jewelry, Luggage, Leather Goods Stores-4483	982,123	137,343	844,780
Jewelry Stores-44831	869,399	137,343	732,056
Luggage and Leather Goods Stores-44832	112,723	0	112,723
<b>Sporting Goods, Hobby, Book, Music Stores-451</b>	<b>3,830,254</b>	<b>2,299,549</b>	<b>1,530,705</b>
Sporting Goods, Hobby, Musical Inst Stores-4511	2,899,157	621,991	2,277,166
Sporting Goods Stores-45111	1,486,716	32,753	1,453,963
Hobby, Toys and Games Stores-45112	962,246	0	962,246
Sew/Needlework/Piece Goods Stores-45113	222,858	464,995	(242,137)
Musical Instrument and Supplies Stores-45114	227,338	124,243	103,095
Book, Periodical and Music Stores-4512	931,097	1,677,558	(746,461)
Book Stores and News Dealers-45121	588,729	997,900	(409,171)
Book Stores-451211	546,464	997,900	(451,436)
News Dealers and Newsstands-45122	42,265	0	42,265
Prerecorded Tapes, CDs, Record Stores-45122	342,368	679,658	(337,290)
<b>General Merchandise Stores-452</b>	<b>33,786,658</b>	<b>52,424,880</b>	<b>(18,638,222)</b>
Department Stores Excl Leased Dpts-4521	16,800,393	5,328,147	11,472,246
Other General Merchandise Stores-4529	16,986,265	47,096,733	(30,110,468)
<b>Miscellaneous Store Retailers-453</b>	<b>4,938,401</b>	<b>2,160,936</b>	<b>2,777,465</b>
Florists-4531	367,411	129,107	238,304
Office Supplies, Stationery, Gift Stores-4532	1,871,940	392,578	1,479,362
Office Supplies and Stationary Stores-45321	982,961	0	982,961
Gift, Novelty and Souvenir Stores-45322	888,978	392,578	496,400
Used Merchandise Stores-4533	485,916	666,818	(180,902)
Other Miscellaneous Store Retailers-4539	2,213,134	972,433	1,240,701
<b>Non-Store Retailers-454</b>	<b>17,395,165</b>	<b>10,276,980</b>	<b>7,118,185</b>
<b>Foodservice and Drinking Places-722</b>	<b>20,737,648</b>	<b>17,475,506</b>	<b>3,262,142</b>
Full-Service Restaurants-7221	9,198,208	14,279,640	(5,081,432)

## RMP Opportunity Gap - Retail Stores

US441 and NW 125th St

Radius 1: , 0.00 - 1.00 Miles, Total

	2011 Demand (Consumer Expenditures)	2011 Supply (Retail Sales)	Opportunity Gap/Surplus
Limited-Service Eating Places-7222	8,919,797	0	8,919,797
Special Foodservices-7223	1,738,791	1,619,638	119,153
Drinking Places -Alcoholic Beverages-7224	880,852	1,576,227	(695,375)
GAFO *	59,695,630	68,822,273	(9,126,643)
General Merchandise Stores-452	33,786,658	52,424,880	(18,638,222)
Clothing and Clothing Accessories Stores-448	12,424,678	8,031,420	4,393,258
Furniture and Home Furnishings Stores-442	3,582,475	2,152,797	1,429,678
Electronics and Appliance Stores-443	4,199,625	3,521,048	678,577
Sporting Goods, Hobby, Book, Music Stores-451	3,830,254	2,299,549	1,530,705
Office Supplies, Stationery, Gift Stores-4532	1,871,940	392,578	1,479,362

## RMP Opportunity Gap - Retail Stores

US441 and NW 125th St

Radius 2: ,0.00 - 3.00 Miles, Total

	2011 Demand (Consumer Expenditures)	2011 Supply (Retail Sales)	Opportunity Gap/Surplus
<b>Total Retail Sales Incl Eating and Drinking Places</b>	1,867,452,256	1,710,571,701	156,880,555
<b>Motor Vehicle and Parts Dealers-441</b>	251,518,976	388,553,569	(137,034,593)
Automotive Dealers-4411	229,506,703	346,202,870	(116,696,167)
Other Motor Vehicle Dealers-4412	4,083,424	9,079,124	(4,995,700)
Automotive Parts/Access, Tire Stores-4413	17,928,849	33,271,575	(15,342,726)
<b>Furniture and Home Furnishings Stores-442</b>	32,492,819	34,913,500	(2,420,681)
Furniture Stores-4421	17,504,201	22,123,381	(4,619,180)
Home Furnishing Stores-4422	14,988,618	12,790,119	2,198,499
<b>Electronics and Appliance Stores-443</b>	38,187,347	46,864,644	(8,677,297)
Appliances, TVs, Electronics Stores-44311	27,991,152	39,211,988	(11,220,836)
Household Appliances Stores-443111	6,399,635	1,858,617	4,541,018
Radio, Television, Electronics Stores-443112	21,591,517	37,353,371	(15,761,854)
Computer and Software Stores-44312	8,502,144	7,317,003	1,185,141
Camera and Photographic Equipment Stores-44313	1,694,051	335,653	1,358,398
<b>Building Material, Garden Equip Stores -444</b>	145,584,735	130,100,685	15,484,050
Building Material and Supply Dealers-4441	132,262,661	129,575,614	2,687,047
Home Centers-44411	54,419,583	50,732,602	3,686,981
Paint and Wallpaper Stores-44412	3,072,496	4,063,435	(990,939)
Hardware Stores-44413	14,237,433	1,475,463	12,761,970
Other Building Materials Dealers-44419	60,533,149	73,304,114	(12,770,965)
Building Materials, Lumberyards-444191	21,806,627	28,661,909	(6,855,282)
Lawn, Garden Equipment, Supplies Stores-4442	13,322,074	525,071	12,797,003
Outdoor Power Equipment Stores-44421	651,248	362,387	288,861
Nursery and Garden Centers-44422	12,670,826	162,684	12,508,142
<b>Food and Beverage Stores-445</b>	280,261,643	347,369,309	(67,107,666)
Grocery Stores-4451	258,054,965	333,975,700	(75,920,735)
Supermarkets, Grocery (Ex Conv) Stores-44511	246,295,630	310,079,897	(63,784,267)
Convenience Stores-44512	11,759,335	23,895,803	(12,136,468)
Specialty Food Stores-4452	8,263,688	8,140,924	122,764
Beer, Wine and Liquor Stores-4453	13,942,991	5,252,685	8,690,306
<b>Health and Personal Care Stores-446</b>	130,559,541	161,872,929	(31,313,388)
Pharmacies and Drug Stores-44611	112,951,046	147,670,974	(34,719,928)
Cosmetics, Beauty Supplies, Perfume Stores-44612	4,785,425	7,875,270	(3,089,845)
Optical Goods Stores-44613	4,299,262	2,117,242	2,182,020
Other Health and Personal Care Stores-44619	8,523,807	4,209,444	4,314,363

## RMP Opportunity Gap - Retail Stores

US441 and NW 125th St

Radius 2: , 0.00 - 3.00 Miles, Total

	2011 Demand (Consumer Expenditures)	2011 Supply (Retail Sales)	Opportunity Gap/Surplus
<b>Gasoline Stations-447</b>	187,818,881	161,351,715	26,467,166
Gasoline Stations With Conv Stores-44711	140,317,419	136,744,881	3,572,538
Other Gasoline Stations-44719	47,501,462	24,606,833	22,894,629
<b>Clothing and Clothing Accessories Stores-448</b>	102,326,995	38,613,388	63,713,607
Clothing Stores-4481	75,409,383	24,405,323	51,004,060
Men's Clothing Stores-44811	4,432,409	1,064,366	3,368,043
Women's Clothing Stores-44812	19,199,173	14,043,338	5,155,835
Childrens, Infants Clothing Stores-44813	4,858,110	1,878,537	2,979,573
Family Clothing Stores-44814	40,143,342	2,013,832	38,129,510
Clothing Accessories Stores-44815	1,724,662	1,604,073	120,589
Other Clothing Stores-44819	5,051,687	3,801,177	1,250,510
Shoe Stores-4482	16,423,884	9,755,455	6,668,429
Jewelry, Luggage, Leather Goods Stores-4483	10,493,728	4,452,610	6,041,118
Jewelry Stores-44831	9,530,376	4,452,610	5,077,766
Luggage and Leather Goods Stores-44832	963,352	0	963,352
<b>Sporting Goods, Hobby, Book, Music Stores-451</b>	33,954,266	23,425,026	10,529,240
Sporting Goods, Hobby, Musical Inst Stores-4511	24,705,733	7,612,878	17,092,855
Sporting Goods Stores-45111	12,375,503	2,547,726	9,827,777
Hobby, Toys and Games Stores-45112	8,332,987	1,407,724	6,925,263
Sew/Needlework/Piece Goods Stores-45113	1,868,301	1,927,349	(59,048)
Musical Instrument and Supplies Stores-45114	2,128,942	1,730,080	398,862
Book, Periodical and Music Stores-4512	9,248,533	15,812,149	(6,563,616)
Book Stores and News Dealers-45121	6,049,324	8,989,801	(2,940,477)
Book Stores-451211	5,674,184	8,989,801	(3,315,617)
News Dealers and Newsstands-451212	375,140	0	375,140
Pre-recorded Tapes, CDs, Record Stores-45122	3,199,209	6,822,348	(3,623,139)
<b>General Merchandise Stores-452</b>	280,440,612	129,307,425	151,133,187
Department Stores Excl Leased Depts-4521	138,678,311	34,415,739	104,262,572
Other General Merchandise Stores-4529	141,762,301	94,891,686	46,870,615
<b>Miscellaneous Store Retailers-453</b>	43,651,607	33,158,894	10,492,713
Florists-4531	3,138,540	2,404,993	733,547
Office Supplies, Stationery, Gift Stores-4532	16,947,548	17,995,723	(1,048,175)
Office Supplies and Stationery Stores-45321	9,088,600	15,059,983	(5,971,383)
Gift, Novelty and Souvenir Stores-45322	7,858,948	2,935,740	4,923,208
Used Merchandise Stores-4533	4,208,838	3,925,587	283,251
Other Miscellaneous Store Retailers-4539	19,356,681	8,832,591	10,524,090
<b>Non-Store Retailers-454</b>	148,830,394	63,466,821	85,363,573
<b>Foodservice and Drinking Places-722</b>	191,824,438	151,573,796	40,250,642
Full-Service Restaurants-7221	85,827,229	71,270,793	14,556,436

## RMP Opportunity Gap - Retail Stores

US441 and NW 125th St

Radius 2: , 0.00 - 3.00 Miles, Total

	2011 Demand (Consumer Expenditures)	2011 Supply (Retail Sales)	Opportunity Gap/Surplus
Limited Service Eating Places-7222	81,789,169	59,932,583	21,856,586
Special Foodservices-7223	15,916,810	14,390,878	1,525,932
Drinking Places -Alcoholic Beverages-7224	8,291,230	5,979,542	2,311,688
<b>GAFO *</b>	<b>504,349,588</b>	<b>291,119,706</b>	<b>213,229,882</b>
General Merchandise Stores-452	280,440,612	129,307,425	151,133,187
Clothing and Clothing Accessories Stores-448	102,326,995	38,613,388	63,713,607
Furniture and Home Furnishings Stores-442	32,492,819	34,913,500	(2,420,681)
Electronics and Appliance Stores-443	38,187,347	46,864,644	(8,677,297)
Sporting Goods, Hobby, Book, Music Stores-451	33,954,266	23,425,026	10,529,240
Office Supplies, Stationery, Gift Stores-4532	16,947,548	17,995,723	(1,048,175)

## RMP Opportunity Gap - Retail Stores

US441 and NW 125th St

Radius 3: , 0.00 - 5.00 Miles, Total

	2011 Demand (Consumer Expenditures)	2011 Supply (Retail Sales)	Opportunity Gap/Surplus
<b>Total Retail Sales Incl Eating and Drinking Places</b>	4,694,942,241	5,198,381,173	(503,438,932)
<b>Motor Vehicle and Parts Dealers-441</b>	641,387,224	1,074,434,952	(433,047,728)
Automotive Dealers-4411	582,888,099	941,539,975	(358,651,876)
Other Motor Vehicle Dealers-4412	12,277,483	59,333,952	(47,056,469)
Automotive Parts/Access, Tire Stores-4413	46,221,642	73,561,025	(27,339,383)
<b>Furniture and Home Furnishings Stores-442</b>	82,822,810	301,734,369	(218,911,559)
Furniture Stores-4421	44,640,097	190,032,309	(145,392,212)
Home Furnishing Stores-4422	38,182,713	111,702,059	(73,519,346)
<b>Electronics and Appliance Stores-443</b>	96,366,222	154,318,036	(57,951,814)
Appliances, TVs, Electronics Stores-44311	70,736,336	127,377,731	(56,641,395)
Household Appliances Stores-443111	16,199,813	5,346,518	10,853,295
Radio, Television, Electronics Stores-443112	54,536,523	122,031,213	(67,494,690)
Computer and Software Stores-44312	21,450,083	21,139,682	310,401
Camera and Photographic Equipment Stores-44313	4,179,804	5,800,623	(1,620,819)
<b>Building Material, Garden Equip Stores -444</b>	370,055,949	324,692,672	45,363,277
Building Material and Supply Dealers-4441	336,361,117	319,689,559	16,671,558
Home Centers-44411	138,311,187	123,705,745	14,605,442
Paint and Wallpaper Stores-44412	7,842,871	8,726,371	(883,500)
Hardware Stores-44413	35,823,373	28,682,248	7,141,125
Other Building Materials Dealers-44419	154,383,686	158,575,194	(4,191,508)
Building Materials, Lumberyards-444191	56,115,994	62,002,899	(5,886,905)
Lawn, Garden Equipment, Supplies Stores-4442	33,694,832	5,003,113	28,691,719
Outdoor Power Equipment Stores-44421	1,866,168	3,944,903	(2,078,735)
Nursery and Garden Centers-44422	31,828,663	1,058,210	30,770,453
<b>Food and Beverage Stores-445</b>	700,173,409	848,740,355	(148,566,946)
Grocery Stores-4451	643,302,218	800,081,735	(156,779,517)
Supermarkets, Grocery (Ex Conv) Stores-44511	613,986,433	749,963,363	(135,976,930)
Convenience Stores-44512	29,315,786	50,118,372	(20,802,586)
Specialty Food Stores-4452	20,496,413	34,033,564	(13,537,151)
Beer, Wine and Liquor Stores-4453	36,374,777	14,625,057	21,749,720
<b>Health and Personal Care Stores-446</b>	335,875,893	451,143,684	(115,267,791)
Pharmacies and Drug Stores-44611	291,036,253	394,912,809	(103,876,556)
Cosmetics, Beauty Supplies, Perfume Stores-44612	12,366,593	25,552,982	(13,186,389)
Optical Goods Stores-44613	10,559,848	10,752,264	(192,416)
Other Health and Personal Care Stores-44619	21,913,199	19,925,630	1,987,569

## RMP Opportunity Gap - Retail Stores

US441 and NW125th St

Radius 3: ,000 - 5.00 Miles, Total

	2011 Demand (Consumer Expenditures)	2011 Supply (Retail Sales)	Opportunity Gap/Surplus
<b>Gasoline Stations-447</b>	467,512,068	434,672,990	32,839,078
Gasoline Stations With Conv Stores-44711	349,137,320	337,261,945	11,875,375
Other Gasoline Stations-44719	118,374,747	97,411,044	20,963,703
<b>Clothing and Clothing Accessories Stores-448</b>	249,367,203	262,613,782	(13,246,579)
Clothing Stores-4481	182,640,403	150,878,644	31,761,759
Men's Clothing Stores-44811	10,839,721	10,842,626	(2,905)
Women's Clothing Stores-44812	46,424,459	77,547,837	(31,123,378)
Childrens, Infants Clothing Stores-44813	11,613,400	6,594,174	5,019,226
Family Clothing Stores-44814	97,273,974	15,506,261	81,767,713
Clothing Accessories Stores-44815	4,202,676	7,218,566	(3,015,890)
Other Clothing Stores-44819	12,286,173	33,169,180	(20,883,007)
Shoe Stores-4482	39,486,557	65,284,837	(25,798,280)
Jewelry, Luggage, Leather Goods Stores-4483	27,240,243	46,450,300	(19,210,057)
Jewelry Stores-44831	24,841,216	46,450,300	(21,609,084)
Luggage and Leather Goods Stores-44832	2,399,027	0	2,399,027
<b>Sporting Goods, Hobby, Book, Music Stores-451</b>	84,101,798	82,079,041	2,022,757
Sporting Goods, Hobby, Musical Inst Stores-4511	61,218,208	47,468,090	13,750,118
Sporting Goods Stores-45111	30,276,267	20,459,016	9,817,251
Hobby, Toys and Games Stores-45112	20,690,013	20,310,334	379,679
Sew/Needlework/Piece Goods Stores-45113	4,765,960	3,589,331	1,176,629
Musical Instrument and Supplies Stores-45114	5,485,969	3,109,410	2,376,559
Book, Periodical and Music Stores-4512	22,883,591	34,610,951	(11,727,360)
Book Stores and News Dealers-45121	14,752,984	19,782,634	(5,029,650)
Book Stores-451211	13,822,858	19,279,447	(5,456,589)
News Dealers and Newsstands-451212	930,126	503,187	426,939
Pre-recorded Tapes, CDs, Record Stores-45122	8,130,607	14,828,317	(6,697,710)
<b>General Merchandise Stores-452</b>	695,470,611	574,815,586	120,655,025
Department Stores Excl Leased Depts-4521	342,238,910	306,177,197	36,061,713
Other General Merchandise Stores-4529	353,231,701	268,638,389	84,593,312
<b>Miscellaneous Store Retailers-453</b>	109,463,409	107,362,256	2,101,153
Florists-4531	7,966,157	6,534,922	1,431,235
Office Supplies, Stationery, Gift Stores-4532	42,979,173	45,256,326	(2,277,153)
Office Supplies and Stationery Stores-45321	23,269,224	35,448,472	(12,179,248)
Gift, Novelty and Souvenir Stores-45322	19,709,949	9,807,854	9,902,095
Used Merchandise Stores-4533	10,333,342	27,249,915	(16,916,573)
Other Miscellaneous Store Retailers-4539	48,184,737	28,321,092	19,863,645
<b>Non-Store Retailers-454</b>	374,769,431	121,220,272	253,549,159
<b>Foodservice and Drinking Places-722</b>	487,576,214	460,553,179	27,023,035
Full-Service Restaurants-7221	218,517,774	239,152,843	(20,635,069)

## RMP Opportunity Gap - Retail Stores

US441 and NW 125th St

Radius 3: , 0.00 - 5.00 Miles, Total

	2011 Demand (Consumer Expenditures)	2011 Supply (Retail Sales)	Opportunity Gap/Surplus
Limited-Service Eating Places-7222	207,496,773	154,774,075	52,722,698
Special Foodservices-7223	40,406,548	41,125,007	(718,459)
Drinking Places -Alcoholic Beverages-7224	21,155,119	25,501,254	(4,346,135)
<b>GAFO *</b>	<b>1,251,107,817</b>	<b>1,420,817,140</b>	<b>(169,709,323)</b>
General Merchandise Stores-452	695,470,611	574,815,586	120,655,025
Clothing and Clothing Accessories Stores-448	249,367,203	262,613,782	(13,246,579)
Furniture and Home Furnishings Stores-442	82,822,810	301,734,369	(218,911,559)
Electronics and Appliance Stores-443	96,366,222	154,318,036	(57,951,814)
Sporting Goods, Hobby, Book, Music Stores-451	84,101,798	82,079,041	2,022,757
Office Supplies, Stationery, Gift Stores-4532	42,979,173	45,256,326	(2,277,153)

\* GAFO (General merchandise, Apparel, Furniture and Other) represents sales at stores that sell merchandise normally sold in department stores. This category is not included in Total Retail Sales Including Eating and Drinking Places.

Nielsen' RMP data is derived from two major sources of information. The demand data is derived from the Consumer Expenditure Survey (CE Survey), which is fielded by the U.S. Bureau of Labor Statistics (BLS). The supply data is derived from the Census of Retail Trade (CRT), which is made available by the U.S. Census. Additional data sources are incorporated to create both supply and demand estimates.

The difference between demand and supply represents the opportunity gap or surplus available for each retail outlet in the specified reporting geography. When the demand is greater than (less than) the supply, there is an opportunity gap (surplus) for that retail outlet. For example, a positive value signifies an opportunity gap, while a negative value signifies a surplus.

## RMP Opportunity Gap - Retail Stores

Dixie Hwy and NE 125th St

Radius 1: , 0.00 - 1.00 Miles, Total

	2011 Demand (Consumer Expenditures)	2011 Supply (Retail Sales)	Opportunity Gap/Surplus
Total Retail Sales Incl Eating and Drinking Places	284,274,645	250,179,749	34,094,896
Motor Vehicle and Parts Dealers-441	37,411,387	14,454,265	22,957,122
Automotive Dealers-4411	34,111,120	10,958,034	23,153,086
Other Motor Vehicle Dealers-4412	530,820	915,133	(384,313)
Automotive Parts/Access, Tire Stores-4413	2,769,448	2,581,098	188,350
Furniture and Home Furnishings Stores-442	4,838,724	3,340,142	1,498,582
Furniture Stores-4421	2,609,596	1,670,732	938,864
Home Furnishing Stores-4422	2,229,129	1,669,410	559,719
Electronics and Appliance Stores-443	5,869,007	16,149,367	(10,280,360)
Appliances, TVs, Electronics Stores-44311	4,294,631	14,144,343	(9,849,712)
Household Appliances Stores-443111	959,376	0	959,376
Radio, Television, Electronics Stores-443112	3,335,255	14,144,343	(10,809,088)
Computer and Software Stores-44312	1,313,295	2,005,224	(691,929)
Camera and Photographic Equipment Stores-44313	261,081	0	261,081
Building Material, Garden Equip Stores -444	21,514,727	1,975,723	19,539,004
Building Material and Supply Dealers-4441	19,530,273	1,944,051	17,586,222
Home Centers-44411	8,072,327	195,401	7,876,926
Paint and Wallpaper Stores-44412	447,039	25,901	421,138
Hardware Stores-44413	2,133,565	0	2,133,565
Other Building Materials Dealers-44419	8,877,342	1,722,749	7,154,593
Building Materials, Lumberyards-444191	3,323,959	673,595	2,650,364
Lawn, Garden Equipment, Supplies Stores-4442	1,984,454	31,672	1,952,782
Outdoor Power Equipment Stores-44421	87,127	0	87,127
Nursery and Garden Centers-44422	1,897,327	31,672	1,865,655
Food and Beverage Stores-445	42,994,453	55,285,432	(12,290,979)
Grocery Stores-4451	39,538,449	54,120,639	(14,582,190)
Supermarkets, Grocery (Ex Conv) Stores-44511	37,697,209	51,018,621	(13,321,412)
Convenience Stores-44512	1,841,240	3,102,017	(1,260,777)
Specialty Food Stores-4452	1,267,626	1,118,696	148,930
Beer, Wine and Liquor Stores-4453	2,188,378	46,097	2,142,281
Health and Personal Care Stores-446	19,019,598	27,976,775	(8,957,177)
Pharmacies and Drug Stores-44611	16,448,063	25,723,282	(9,275,219)
Cosmetics, Beauty Supplies, Perfume Stores-44612	692,155	998,941	(306,786)
Optical Goods Stores-44613	637,132	766,705	(129,573)
Other Health and Personal Care Stores-44619	1,242,248	487,847	754,401

## RMP Opportunity Gap - Retail Stores

Dixie Hwy and NE 125th St

Radius 1: ,000 - 1.00 Miles, Total

	2011 Demand (Consumer Expenditures)	2011 Supply (Retail Sales)	Opportunity Gap/Surplus
<b>Gasoline Stations-447</b>	29,334,569	15,852,028	13,482,541
Gasoline Stations With Conv Stores-44711	21,949,634	15,832,043	6,117,591
Other Gasoline Stations-44719	7,384,936	19,985	7,364,951
<b>Clothing and Clothing Accessories Stores-448</b>	15,627,593	8,516,666	7,110,927
Clothing Stores-4481	11,530,937	5,401,607	6,129,330
Men's Clothing Stores-44811	678,897	402,236	276,661
Women's Clothing Stores-44812	2,930,968	3,092,110	(161,142)
Childrens, Infants Clothing Stores-44813	747,200	0	747,200
Family Clothing Stores-44814	6,142,283	0	6,142,283
Clothing Accessories Stores-44815	262,819	569,062	(306,243)
Other Clothing Stores-44819	768,771	1,338,199	(569,428)
Shoe Stores-4482	2,532,819	2,332,886	199,933
Jewelry, Luggage, Leather Goods Stores-4483	1,563,836	782,173	781,663
Jewelry Stores-44831	1,415,806	782,173	633,633
Luggage and Leather Goods Stores-44832	148,030	0	148,030
<b>Sporting Goods, Hobby, Book, Music Stores-451</b>	5,268,039	5,889,258	(621,219)
Sporting Goods, Hobby, Musical Inst Stores-4511	3,745,265	975,645	2,769,620
Sporting Goods Stores-45111	1,877,481	6,879	1,870,602
Hobby, Toys and Games Stores-45112	1,266,347	304,323	962,024
Sew/Needlework/Piece Goods Stores-45113	274,284	169,739	104,545
Musical Instrument and Supplies Stores-45114	327,154	494,704	(167,550)
Book, Periodical and Music Stores-4512	1,522,775	4,913,613	(3,390,838)
Book Stores and News Dealers-45121	1,025,659	4,443,659	(3,418,000)
Book Stores-451211	965,816	4,443,659	(3,477,843)
News Dealers and Newsstands-451212	59,843	0	59,843
Prerecorded Tapes, CDs, Record Stores-45122	497,116	469,953	27,163
<b>General Merchandise Stores-452</b>	42,649,917	67,407,085	(24,757,168)
Department Stores Excl Leased Depts-4521	21,008,624	21,268,056	(259,432)
Other General Merchandise Stores-4529	21,641,293	46,139,029	(24,497,736)
<b>Miscellaneous Store Retailers-453</b>	6,788,856	5,547,494	1,241,362
Florists-4531	462,450	587,244	(124,794)
Office Supplies, Stationery, Gift Stores-4532	2,613,050	1,072,557	1,540,493
Office Supplies and Stationery Stores-45321	1,404,192	669,621	734,571
Gift, Novelty and Souvenir Stores-45322	1,208,859	402,936	805,923
Used Merchandise Stores-4533	652,924	1,451,591	(798,667)
Other Miscellaneous Store Retailers-4539	3,060,431	2,436,102	624,329
<b>Non-Store Retailers-454</b>	22,525,029	9,776,443	12,748,586
<b>Foodservice and Drinking Places-722</b>	30,432,744	18,008,872	12,423,872
Full-Service Restaurants-7221	13,635,726	9,562,614	4,073,112

## RMP Opportunity Gap - Retail Stores

Dixie Hwy and NE 125th St

Radius 1: ,0.00 - 1.00 Miles, Total

	2011 Demand (Consumer Expenditures)	2011 Supply (Retail Sales)	Opportunity Gap/Surplus
Limited-Service Eating Places-7222	12,965,960	4,401,349	8,564,611
Special Foodservices-7223	2,518,509	3,733,352	(1,214,843)
Drinking Places -Alcoholic Beverages-7224	1,312,549	311,556	1,000,993
<b>GAFO *</b>	<b>76,866,331</b>	<b>102,375,275</b>	<b>(25,508,944)</b>
General Merchandise Stores-452	42,649,917	67,407,085	(24,757,168)
Clothing and Clothing Accessories Stores-448	15,627,593	8,516,666	7,110,927
Furniture and Home Furnishings Stores-442	4,838,724	3,340,142	1,498,582
Electronics and Appliance Stores-443	5,869,007	16,149,567	(10,280,560)
Sporting Goods, Hobby, Book, Music Stores-451	5,268,039	5,889,258	(621,219)
Office Supplies, Stationery, Gift Stores-4532	2,613,050	1,072,557	1,540,493

## RMP Opportunity Gap - Retail Stores

Dixie Hwy and NE 125th St

Radius 2: ,0.00 - 2.00 Miles, Total

	2011 Demand (Consumer Expenditures)	2011 Supply (Retail Sales)	Opportunity Gap/Surplus
<b>Total Retail Sales Incl Eating and Drinking Places</b>	1,059,808,478	1,024,071,401	35,737,077
<b>Motor Vehicle and Parts Dealers-441</b>	145,795,176	130,211,640	15,583,536
Automotive Dealers-4411	132,618,258	105,600,588	27,017,670
Other Motor Vehicle Dealers-4412	2,235,796	8,491,998	(6,256,202)
Automotive Parts/Access, Tire Stores-4413	10,941,123	16,119,054	(5,177,931)
<b>Furniture and Home Furnishings Stores-442</b>	19,306,835	30,526,187	(11,219,352)
Furniture Stores-4421	10,459,678	9,548,905	910,773
Home Furnishing Stores-4422	8,847,157	20,977,282	(12,130,125)
<b>Electronics and Appliance Stores-443</b>	22,386,312	36,810,506	(14,424,194)
Appliances, TVs, Electronics Stores-44311	16,405,187	33,527,366	(17,122,179)
Household Appliances Stores-443111	3,729,673	985,782	2,743,891
Radio, Television, Electronics Stores-443112	12,675,514	32,541,584	(19,866,070)
Computer and Software Stores-44312	4,981,583	3,283,140	1,698,443
Camera and Photographic Equipment Stores-44313	999,541	0	999,541
<b>Building Material, Garden Equip Stores -444</b>	85,523,190	104,752,913	(19,229,723)
Building Material and Supply Dealers-4441	77,858,969	104,657,950	(26,798,981)
Home Centers-44411	31,932,380	75,336,569	(43,404,189)
Paint and Wallpaper Stores-44412	1,834,161	2,290,060	(455,899)
Hardware Stores-44413	8,218,350	131,389	8,086,961
Other Building Materials Dealers-44419	35,874,078	26,899,931	8,974,147
Building Materials, Lumberyards-444191	13,294,125	10,517,873	2,776,252
Lawn, Garden Equipment, Supplies Stores-4442	7,664,221	94,962	7,569,259
Outdoor Power Equipment Stores-44421	367,028	0	367,028
Nursery and Garden Centers-44422	7,297,194	94,962	7,202,232
<b>Food and Beverage Stores-445</b>	154,460,214	168,114,713	(13,654,499)
Grocery Stores-4451	141,732,310	163,844,297	(22,111,987)
Supermarkets, Grocery (Ex Conv) Stores-44511	135,163,530	150,891,503	(15,727,973)
Convenience Stores-44512	6,568,779	12,952,794	(6,384,015)
Specialty Food Stores-4452	4,513,528	2,460,137	2,053,391
Beer, Wine and Liquor Stores-4453	8,214,376	1,810,279	6,404,097
<b>Health and Personal Care Stores-446</b>	71,798,281	118,626,122	(46,827,841)
Pharmacies and Drug Stores-44611	62,107,562	109,612,376	(47,504,814)
Cosmetics, Beauty Supplies, Perfume Stores-44612	2,624,150	4,275,585	(1,651,435)
Optical Goods Stores-44613	2,394,699	2,045,538	349,161
Other Health and Personal Care Stores-44619	4,671,870	2,692,623	1,979,247

## RMP Opportunity Gap - Retail Stores

Dixie Hwy and NE 125th St

Radius 2: ,0.00 - 2.00 Miles, Total

	2011 Demand (Consumer Expenditures)	2011 Supply (Retail Sales)	Opportunity Gap/Surplus
<b>Gasoline Stations-447</b>	105,507,899	74,871,540	30,636,359
Gasoline Stations With Conv Stores-44711	78,785,959	66,355,671	12,430,288
Other Gasoline Stations-44719	26,721,940	8,515,870	18,206,070
<b>Clothing and Clothing Accessories Stores-448</b>	57,209,304	28,546,641	28,662,663
Clothing Stores-4481	41,789,547	17,737,271	24,052,276
Men's Clothing Stores-44811	2,520,894	738,689	1,782,205
Women's Clothing Stores-44812	10,659,093	11,390,116	(731,023)
Childrens, Infants Clothing Stores-44813	2,569,853	1,266,002	1,303,851
Family Clothing Stores-44814	22,261,009	249,568	22,011,441
Clothing Accessories Stores-44815	971,839	815,355	156,484
Other Clothing Stores-44819	2,806,859	3,277,540	(470,681)
Shoe Stores-4482	8,913,244	6,378,846	2,534,398
Jewelry, Luggage, Leather Goods Stores-4483	6,506,514	4,430,524	2,075,990
Jewelry Stores-44831	5,946,615	4,430,524	1,516,091
Luggage and Leather Goods Stores-44832	559,899	0	559,899
<b>Sporting Goods, Hobby, Book, Music Stores-451</b>	19,957,536	15,604,140	4,353,396
Sporting Goods, Hobby, Musical Inst Stores-4511	14,199,753	5,863,968	8,335,785
Sporting Goods Stores-45111	7,116,171	851,087	6,265,084
Hobby, Toys and Games Stores-45112	4,715,966	1,557,558	3,158,408
Sew/Needlework/Piece Goods Stores-45113	1,086,866	1,846,216	(759,350)
Musical Instrument and Supplies Stores-45114	1,280,750	1,609,107	(328,357)
Book, Periodical and Music Stores-4512	5,757,783	9,740,172	(3,982,389)
Book Stores and News Dealers-45121	3,845,083	5,951,823	(2,106,740)
Book Stores-451211	3,626,805	5,951,823	(2,325,018)
News Dealers and Newsstands-451212	218,277	0	218,277
Pre-recorded Tapes, CDs, Record Stores-45122	1,912,700	3,788,349	(1,875,649)
<b>General Merchandise Stores-452</b>	155,689,378	149,949,503	5,739,875
Department Stores Excl Leased Depts-4521	77,063,006	66,344,648	10,718,358
Other General Merchandise Stores-4529	78,626,371	83,604,854	(4,978,483)
<b>Miscellaneous Store Retailers-453</b>	25,504,417	24,907,096	597,321
Florists-4531	1,838,861	1,838,093	768
Office Supplies, Stationery, Gift Stores-4532	10,069,486	13,224,790	(3,155,304)
Office Supplies and Stationery Stores-45321	5,503,500	11,229,120	(5,725,620)
Gift, Novelty and Souvenir Stores-45322	4,565,986	1,995,670	2,570,316
Used Merchandise Stores-4533	2,429,177	3,732,237	(1,303,060)
Other Miscellaneous Store Retailers-4539	11,166,893	6,111,976	5,054,917
<b>Non-Store Retailers-454</b>	84,432,315	42,150,096	42,282,219
<b>Foodservice and Drinking Places-722</b>	112,237,622	99,000,304	13,237,318
Full-Service Restaurants-7221	50,430,510	52,761,084	(2,330,574)

## RMP Opportunity Gap - Retail Stores

Dixie Hwy and NE 125th St

Radius 2: , 0.00 - 2.00 Miles, Total

	2011 Demand (Consumer Expenditures)	2011 Supply (Retail Sales)	Opportunity Gap/Surplus
Limited-Service Eating Places-7222	47,642,310	32,757,556	14,884,754
Special Foodservices-7223	9,282,491	9,471,366	(188,875)
Drinking Places -Alcoholic Beverages-7224	4,882,311	4,010,299	872,012
GAFO *	284,618,850	274,661,766	9,957,084
General Merchandise Stores-452	155,689,378	149,949,503	5,739,875
Clothing and Clothing Accessories Stores-448	57,209,304	28,546,641	28,662,663
Furniture and Home Furnishings Stores-442	19,306,835	30,526,187	(11,219,352)
Electronics and Appliance Stores-443	22,386,312	36,810,506	(14,424,194)
Sporting Goods, Hobby, Book, Music Stores-451	19,957,536	15,604,140	4,353,396
Office Supplies, Stationery, Gift Stores-4532	10,069,486	13,224,790	(3,155,304)

## RMP Opportunity Gap - Retail Stores

Dixie Hwy and NE 125th St

Radius 3: ,0.00 - 3.00 Miles, Total

	2011 Demand (Consumer Expenditures)	2011 Supply (Retail Sales)	Opportunity Gap/Surplus
<b>Total Retail Sales Incl Eating and Drinking Places</b>	1,866,774,683	2,224,068,014	(357,293,331)
<b>Motor Vehicle and Parts Dealers-441</b>	256,377,274	427,605,559	(171,228,285)
Automotive Dealers-4411	233,510,119	376,680,837	(143,170,718)
Other Motor Vehicle Dealers-4412	4,060,913	19,523,239	(15,462,326)
Automotive Parts/Accsrs, Tire Stores-4413	18,806,242	31,401,484	(12,595,242)
<b>Furniture and Home Furnishings Stores-442</b>	33,602,854	113,476,185	(79,873,331)
Furniture Stores-4421	18,209,737	27,343,858	(9,134,121)
Home Furnishing Stores-4422	15,393,117	86,132,327	(70,739,210)
<b>Electronics and Appliance Stores-443</b>	38,948,297	99,018,885	(60,070,588)
Appliances, TV s, Electronics Stores-44311	28,568,734	87,085,205	(58,516,471)
Household Appliances Stores-443111	6,508,587	1,314,297	5,194,290
Radio, Television, Electronics Stores-443112	22,060,147	85,770,908	(63,710,761)
Computer and Software Stores-44312	8,650,073	11,421,290	(2,771,217)
Camera and Photographic Equipment Stores-44313	1,729,489	512,390	1,217,099
<b>Building Material, Garden Equip Stores -444</b>	148,696,976	165,006,132	(16,309,156)
Building Material and Supply Dealers-4441	135,261,889	164,173,150	(28,911,261)
Home Centers-44411	55,601,565	84,014,569	(28,413,004)
Paint and Wallpaper Stores-44412	3,167,943	5,304,646	(2,136,703)
Hardware Stores-44413	14,380,613	3,158,558	11,222,055
Other Building Materials Dealers-44419	62,111,768	71,695,376	(9,583,608)
Building Materials, Lumberyards-444191	22,833,252	28,032,891	(5,199,639)
Lawn, Garden Equipment, Supplies Stores-4442	13,435,087	832,982	12,602,105
Outdoor Power Equipment Stores-44421	654,387	670,298	(15,911)
Nursery and Garden Centers-44422	12,780,700	162,684	12,618,016
<b>Food and Beverage Stores-445</b>	274,551,182	320,462,317	(45,911,135)
Grocery Stores-4451	252,220,733	304,796,638	(52,575,905)
Supermarkets, Grocery (Ex Conv) Stores-44511	240,607,788	282,664,028	(42,056,240)
Convenience Stores-44512	11,612,945	22,132,610	(10,519,665)
Specialty Food Stores-4452	8,048,467	11,006,214	(2,957,747)
Beer, Wine and Liquor Stores-4453	14,281,982	4,659,465	9,622,517
<b>Health and Personal Care Stores-446</b>	127,692,862	234,197,891	(106,505,029)
Pharmacies and Drug Stores-44611	110,461,227	209,210,063	(98,748,836)
Cosmetics, Beauty Supplies, Perfume Stores-44612	4,672,057	8,919,692	(4,247,635)
Optical Goods Stores-44613	4,241,087	7,278,317	(3,037,230)
Other Health and Personal Care Stores-44619	8,318,491	8,789,819	(471,328)

## RMP Opportunity Gap - Retail Stores

Dixie Hwy and NE 125th St

Radius 3: , 0.00 - 3.00 Miles, Total

	2011 Demand (Consumer Expenditures)	2011 Supply (Retail Sales)	Opportunity Gap/Surplus
Gasoline Stations-447	186,526,836	160,160,922	26,365,914
Gasoline Stations With Conv Stores-44711	139,273,247	135,858,022	3,415,225
Other Gasoline Stations-44719	47,253,589	24,302,900	22,950,689
<b>Clothing and Clothing Accessories Stores-448</b>	<b>101,226,801</b>	<b>79,712,301</b>	<b>21,514,500</b>
Clothing Stores-4481	74,081,034	46,354,189	27,726,845
Men's Clothing Stores-44811	4,437,012	4,533,026	(96,014)
Women's Clothing Stores-44812	18,871,590	28,298,422	(9,426,832)
Childrens, Infants Clothing Stores-44813	4,627,690	3,217,156	1,410,534
Family Clothing Stores-44814	39,461,454	2,124,888	37,336,566
Clothing Accessories Stores-44815	1,713,958	2,148,420	(434,462)
Other Clothing Stores-44819	4,969,328	6,032,278	(1,062,950)
Shoe Stores-4482	15,932,223	23,612,013	(7,679,790)
Jewelry, Luggage, Leather Goods Stores-4483	11,213,544	9,746,099	1,467,445
Jewelry Stores-44831	10,235,523	9,746,099	489,424
Luggage and Leather Goods Stores-44832	978,022	0	978,022
<b>Sporting Goods, Hobby, Book, Music Stores-451</b>	<b>34,572,599</b>	<b>29,773,208</b>	<b>4,799,391</b>
Sporting Goods, Hobby, Musical Inst Stores-4511	24,853,937	14,450,963	10,402,974
Sporting Goods Stores-45111	12,438,892	3,002,511	9,436,381
Hobby, Toys and Games Stores-45112	8,300,345	7,570,995	729,350
Sew/Needlework/Piece Goods Stores-45113	1,893,737	2,138,067	(244,330)
Musical Instrument and Supplies Stores-45114	2,220,963	1,739,391	481,572
Book, Periodical and Music Stores-4512	9,718,662	15,322,245	(5,603,583)
Book Stores and News Dealers-45121	6,405,706	7,300,492	(894,786)
Book Stores-451211	6,026,629	7,300,492	(1,273,863)
News Dealers and Newsstands-451212	379,076	0	379,076
Prerecorded Tapes, CDs, Record Stores-45122	3,312,956	8,021,753	(4,708,797)
<b>General Merchandise Stores-452</b>	<b>275,958,914</b>	<b>278,477,296</b>	<b>(2,518,382)</b>
Department Stores Excl Lease Depts-4521	136,553,024	148,916,057	(12,363,033)
Other General Merchandise Stores-4529	139,405,890	129,561,239	9,844,651
<b>Miscellaneous Store Retailers-453</b>	<b>44,391,602</b>	<b>47,014,455</b>	<b>(2,622,853)</b>
Florists-4531	3,198,936	3,195,298	3,638
Office Supplies, Stationery, Gift Stores-4532	17,438,328	23,680,237	(6,241,909)
Office Supplies and Stationery Stores-45321	9,471,809	18,730,513	(9,258,704)
Gift, Novelty and Souvenir Stores-45322	7,966,519	4,949,724	3,016,795
Used Merchandise Stores-4533	4,239,980	6,230,826	(1,990,846)
Other Miscellaneous Store Retailers-4539	19,514,357	13,908,094	5,606,263
<b>Non-Store Retailers-454</b>	<b>148,440,834</b>	<b>59,837,092</b>	<b>88,603,742</b>
<b>Foodservice and Drinking Places-722</b>	<b>195,787,653</b>	<b>209,325,772</b>	<b>(13,538,119)</b>
Full-Service Restaurants-7221	87,847,098	94,843,197	(6,996,099)

## RMP Opportunity Gap - Retail Stores

Dixie Hwy and NE 125th St

Radius 3: ,000 - 3.00 Miles, Total

	2011 Demand (Consumer Expenditures)	2011 Supply (Retail Sales)	Opportunity Gap/Surplus
Limited-Service Eating Places-7222	83,251,816	92,357,343	(9,105,527)
Special Foodservices-7223	16,212,027	17,247,214	(1,035,187)
Drinking Places -Alcoholic Beverages-7224	8,476,712	4,878,019	3,598,693
<b>GAFO *</b>	<b>501,747,792</b>	<b>624,138,112</b>	<b>(122,390,320)</b>
General Merchandise Stores-452	275,958,914	278,477,296	(2,518,382)
Clothing and Clothing Accessories Stores-448	101,226,801	79,712,301	21,514,500
Furniture and Home Furnishings Stores-442	33,602,854	113,476,185	(79,873,331)
Electronics and Appliance Stores-443	38,948,297	99,018,885	(60,070,588)
Sporting Goods, Hobby, Book, Music Stores-451	34,572,599	29,773,208	4,799,391
Office Supplies, Stationery, Gift Stores-4532	17,438,328	23,680,237	(6,241,909)

\* GAFO (General merchandise, Apparel, Furniture and Other) represents sales at stores that sell merchandise normally sold in department stores. This category is not included in Total Retail Sales Including Eating and Drinking Places.

Nielsen RMP data is derived from two major sources of information. The demand data is derived from the Consumer Expenditure Survey (CE Survey), which is fielded by the U.S. Bureau of Labor Statistics (BLS). The supply data is derived from the Census of Retail Trade (CRT), which is made available by the U.S. Census. Additional data sources are incorporated to create both supply and demand estimates.

The difference between demand and supply represents the opportunity gap or surplus available for each retail outlet in the specified reporting geography. When the demand is greater than (less than) the supply, there is an opportunity gap (surplus) for that retail outlet. For example, a positive value signifies an opportunity gap, while a negative value signifies a surplus.