HART TOD
RETAIL ADVISORY SERVICES

TAMPA, FLORIDA
PREPARED FOR HDR

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streetsense.

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Executive Summary

Streetsense, in support of the efforts of HDR for Tampa Hillsborough Area Regional Transit (HART), has conducted a retail market assessment and site selection strategy for the HART Arterial BRT Corridor, the Tampa Streetcar extension, and a portion of the Regional Rapid Transit alignment. This document is intended to serve as a bridge between the market analyses conducted by SB Friedman Development Advisors, the existing and potential retail development conditions and the project planning team's design work to provide market-appropriate, subarea-specific retail recommendations.

The data evaluations, existing conditions, retail site selection criteria, and commercial lending practices applied to the HART Corridor have reached the following conclusions for each subarea:

DOWNTOWN SUBAREA

The Downtown Subarea, located on the south end of the study area, is characterized by its existing, high-density, walkable, mixed-use environment within a half mile of known or planned transit stations. The subarea is bounded by Interstate 275 and Interstate 4 to the north.

Approximately 700,000 SF of retail supply within this subarea's inventory are currently present, and by 2030, the subarea can support 400,000 SF of retail. The dominant retail category is Food and Beverage.

Up and coming developments, such as Water Street Tampa, hinder the ability of the downtown to generate large, mixed-use Transit-Oriented environments without the risk of increasing vacancy. Convenience-based, transit adjacent retail opportunities are recommended as the downtown retail environment experiences a restructuring over the coming decades.

FLORIDA/NEBRASKA SUBAREA

Due to their similar typologies and site conditions, the three subareas identified by SBFriedman were combined under one Subarea: Tampa Heights, Seminole Heights, and North Florida/Nebraska. The subarea is characterized by low-density, freestanding strip retail along the seven mile corridor that runs North-South.

The Florida/Nebraska subarea has a total retail supply of 2,600,000 SF of inventory. Total retail demand for the corridor sums to 763,300 SF by 2030, primarily in the NG&S category.

Oversupply and vacancy throughout the corridor, combined with the divergence in customer behaviors demanded by auto-oriented customers and Transit-Oriented supply indicates the there is limited potential for Transit Oriented retail developments along the breadth of the corridor.

FOWLER/USF SUBAREA

The Fowler/USF Subarea connects the east-west corridor of Fowler Ave. and the institutional corridor of University of South Florida and the AdventHealth campus on Bruce B. Downs Blvd.

The existing retail centers, most notably, the University Mall, and the auto-oriented, convenience retail along the university corridor, are suited to repositioning in response to the transit corridor. There are currently 3.5M SF of retail in this subarea, with 763,000 SF demanded in 2030.

Plans for mixed-use redevelopment of the University Mall will bring new populations to the study area, however; the demand by new populations should not be overestimated.

Methodology & Terminology

METHODOLOGY

To evaluate the study area's ability to command competitive retail rent rates and terms, the presence of a market (unmet) demand for future retail offerings must first be established.

Demand for non-retail uses, such as banks, gyms, daycares, and performance/entertainment venues, are determined differently, therefore they are not included within this retail market analysis. However, these types of establishments contribute to the overall placemaking and retail landscape and will be called out in cases in which appropriate demand potential has been identified.

For the purposes of this assessment, the following tasks were undertaken to evaluate the retail potential for each subarea:

LITERATURE REVIEW

The market information from the existing conditions market assessment produced by SBFriedman is the foundation of understanding for this retail market analysis. The SBFriedman report, as provided to Streetsense on October 21, 2020, offers critical information on supply by square feet for each subarea, characteristics about typology and physical environment (due to the COVID-19 pandemic that limits travel and in-person fieldwork by the Streetsense team, these findings are supplemented by further digital physical assessment on Google Earth and Streetview), retail classification by shopping center type and a breakdown for each subarea, an assessment of real estate development momentum, and a general assessment of occupancy characteristics for each subarea.

COMPETITION ASSESSMENT

A summary and assessment are undertaken of the existing retail competition for customers in the area's retail market. Since the study area is located in a market that contains a number of shopping and dining options, the levels of impact for these competitive centers are incorporated.

IDENTIFY TRADES AREAS

Boundaries for trade areas are then determined for primary (PTA), secondary (STA), and tertiary (TTA) levels of customer draws. The boundaries of the trade areas are primarily impacted by existing retail competition in the retail market, access, convenience, physical and psychological barriers.

TRACK EXPENDITURES BY CUSTOMER TYPE

The Primary Trade Area (PTA) identifies the segments from which the district's establishments draw a majority of their regular sales. The percentage of household expenditures captured by retailers is expected to be highest in its PTA. Additionally, convenience is a major factor for sales generated locally. The Secondary Trade Area (STA) and Tertiary Trade Area (TTA) delineate market segments that will also attribute to sales generated at lower capture rates. Streetsense and International Council of Shopping Centers (ICSC) estimate that workers spend at least $5,049 annually near their work.

ASSIGN CAPTURE RATES

Expenditures are determined from information gathered from the U.S. Census Bureau, ESRI, and Claritas, Inc., as appropriate. These total estimated expenditures are multiplied by a capture rate to estimate total captured expenditures. Capture rates are set by evaluating the amount, accessibility, and quality of existing and proposed retail development on the study area's ability to draw customer expenditures within the context of the larger market.

TRANSLATE DEMAND INTO SQUARE FEET OF RETAIL SUPPORTED

Total estimated, captured expenditures in each retail category are divided by expectations for sales per square foot by retail tenant type. The result of this calculation yields an estimated total amount of demand for the site. From this information, an ideal retail merchandising mix can be considered in the calculation of market-appropriate rent rates and tenant improvement allowances.

RETAIL CONCLUSIONS

The retail demand figures are contrasted with the supply figures as provided by the SBFriedman report to evaluate the performance of each subarea's retail market - in other words, determining whether there is unmet demand or an overbuilding of the commercial retail environment ("oversupply"). These findings help to inform a comprehensive understanding of potential clustering opportunities, in tandem with an understanding of the physical environment.

TERMINOLOGY
RETAIL CATEGORIES

NEIGHBORHOOD GOOD & SERVICE (NG&S)

Grocery Store, Neighborhood Market, Pharmacy, Dry Cleaner, Tailor/Seamstress, Nail/Hair Salon, Barber Shop, Spa, etc.

FOOD & BEVERAGE (F&B)

Sit-Down, Full-Service, Fast Casual Restaurant, Fast Food Restaurant, Carry-Out Restaurant, Cafe, Coffee Shop, etc.

GENERAL MERCHANDISE, APPAREL, FURNISHINGS & OTHER (GAFO)

Apparel/Clothing Store, Electronic Store, Furniture Store, Pet Store, Sports Store, Book/Music Store, etc.

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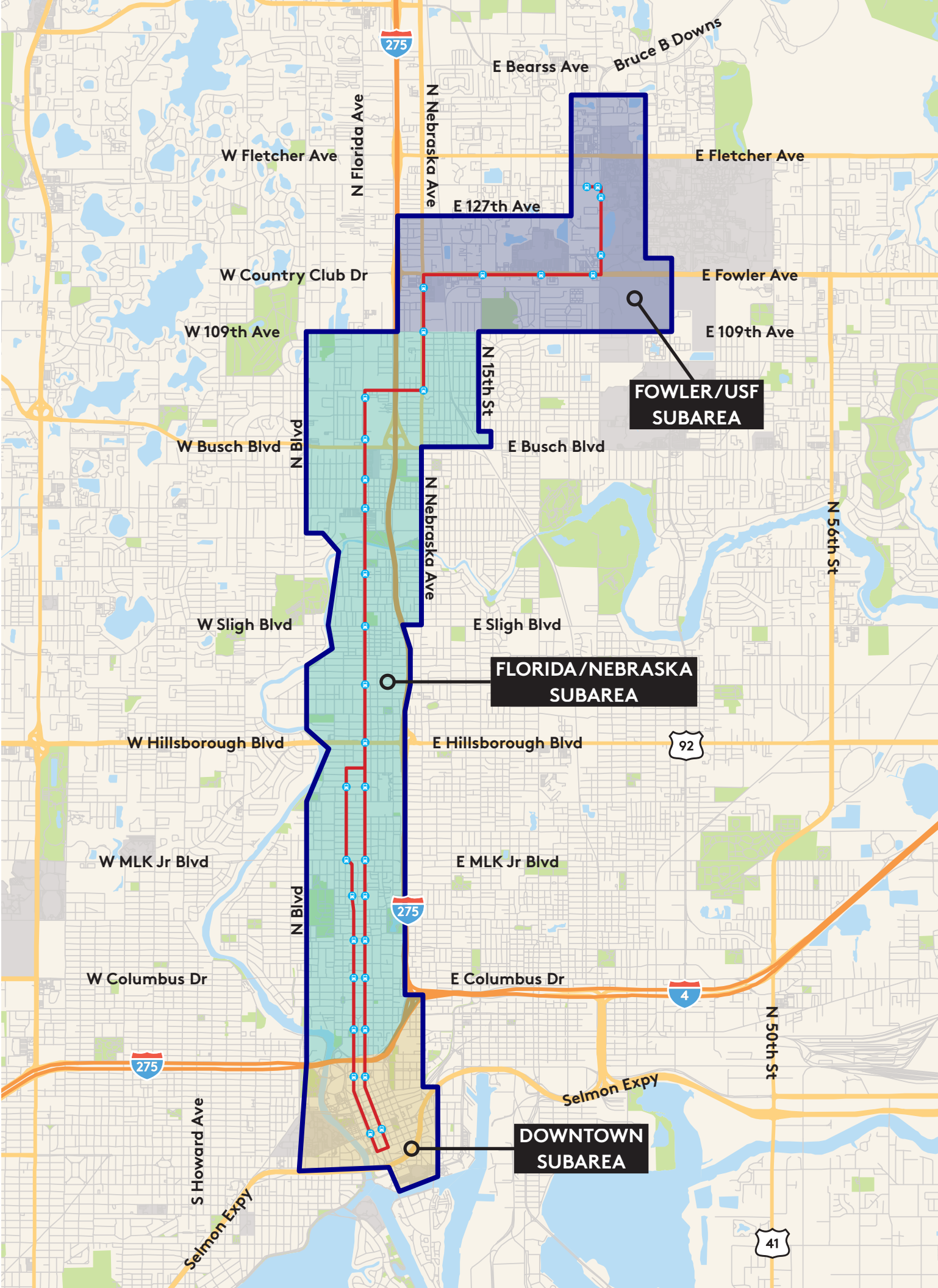
HART Transit-Oriented Development Introduction

The Hillsborough Area Regional Transit (HART) Study Area is characterized by a complex retail and real estate landscape. From a densely populated downtown district to a car-dependent commercial corridor to a cluster of campuses, the region diverges greatly in retail supply offerings along the multiple miles that traverse parallel to Interstate-275. This study is intended to aid the planning team, developers, and public officials in locating retail along this long stretch of corridor as the transit corridor is built up and creates new opportunities (and conflicts) in retail development. The goal of this assessment is to identify and prioritize appropriately sized and scaled market supportable retail offerings that can be clustered together to maximize placemaking opportunities along the commercial corridor.

A comprehensive review of SBFriedman's market assessment informs the foundation of the market understanding in this report. SBFriedman's market assessment designates five subareas into three distinct submarket typology categories, based primarily on their ability to activate potential public and private interest and investment in transit-oriented development: weaker market, emerging market, and stronger market. SB Friedman concludes the retail and overall market strength for Downtown as being strong, Tampa Heights and Seminole Heights as emerging, and North Florida/Nebraska and Fowler/USF as weaker markets.

To fully understand the unique qualities of varying clusters and the impact that these characteristics have on their ability to command and maintain commercial vitality and investment, this study examines the retail landscape in three distinct subareas. For the purpose of studying the retail landscape, these subareas are Downtown, Florida/Nebraska, and Fowler/USF. Tampa Heights, Seminole Heights, and North Florida/Nebraska share similar characteristics and conditions that differ from Downtown and Fowler/USF, however, all factors were still considered within the final conclusion and recommendation section of this report. Approximately 57% of the study area's retail square footage falls within this auto-oriented development category, per the Market Assessment by SBFriedman.

The study area's projected population and employment growth will generate demand for new retail development, however, market potential limits opportunities in the pipeline. In some areas, new-to-market concepts will involve added risk due to the nature of existing conditions.

HART Transit-Oriented Development Study Area

The following subareas create distinctive retail environments for prospective development. These characteristics are unique to the retail real estate landscape and compose the natural breaks between each subarea.

DOWNTOWN SUBAREA

The Downtown Subarea, located on the south end of the study area, is characterized by its existing, high-density, walkable, mixed-use environment. There is approximately 700,000 SF of retail supply within this subarea's inventory. The area's vacancy rates, per the SBFriedman report, are low. The subarea's downtown core offers experienced-based shopping and dining opportunities with regional entertainment options. The subarea is bounded by Interstate 275 and Interstate 4 to the north.

FLORIDA/NEBRASKA SUBAREA

The Florida/Nebraska Subarea is a seven mile long, auto-centric commercial corridor that runs parallel to the newer, more highly trafficked I-275. Due to their similar typologies and site conditions, the three subareas identified by SBFriedman were combined under one subarea: Tampa Heights, Seminole Heights, and North Florida/Nebraska. The three combined subareas have a total retail supply of 2,600,000 SF of inventory, with some vacancy in small-scale retailers. Tampa Heights is composed primarily of freestanding/ strip centers and auto-centric convenience stores, with an emerging main street presence that offers experienced-based shopping and dining opportunities, including a cluster of locally-owned restaurants and breweries. The Armature Works project is located within Tampa Heights. The subarea has an emerging component of experiential-oriented retail offerings. These include the restaurants associated with Seminole Heights; however, these restaurants exist in an auto-oriented typology and present as rehab or redevelopment of older buildings. This typology diverts from the traditional contiguous retail frontage and brings a "new-to-market" concept that will continue to test the market over the next ten years. North Florida/Nebraska is bounded by 109th Avenue to the north. It is home to the corridor's convenience-based, grocery-anchored neighborhood and community centers.

FOWLER/USF SUBAREA

The Fowler/USF Subarea, located on the north end of the study area, is characterized by its cluster of big box and grocery-anchored neighborhood retailers, medical centers, campuses, and regional mall, which is slated to be redeveloped into a live, work, play mixed-use lifestyle center known as "Uptown" by 2030. The subarea contains approximately 3,500,000 SF of retail within its supply inventory with vacancies occurring in strip and big box centers. The corridor includes several fast food, full-service restaurants, and power centers for convenience-based shopping and dining trips.

DOWNTOWN SUBAREA

FLORIDA/NEBRASKA SUBAREA

FOWLER/USF SUBAREA

The North Tampa Retail Ecosystem: Regional Competition

Retail that competes with the HART TOD commercial corridor subareas is observed on two levels: neighborhood-oriented and destination-oriented retail.

The map to the right highlights the destination-oriented retail that offers regional, experience-based shopping and dining opportunities that typically include GAFO cotenanted with F&B. These offerings and commercial environments typically attract and serve customers from a much larger trade area, typically those living within 45 minutes of the site.

The North Tampa regional retail landscape is dominated by traditional, enclosed shopping malls, and walkable mixed-use lifestyle centers across the metro area. These shopping malls are predominantly GAFO focused, and compete for customers, who primarily local residents and employees, who are searching for destination-oriented, and often, upscale, retail opportunities. Many of these malls have been redevelopment in response to changes in consumer behaviors and preferences. These include, but are not limited to:

International Plaza and Bay Street are a cluster of two centers, including a 1,250,000 SF enclosed, upscale shopping mall, and a 125,000 SF outdoor lifestyle center. International Plaza and Bay Street are anchored by Dillard's, Nordstrom, and Neiman Marcus.

Westshore Plaza is one of the most established retail centers in Tampa, at 53 years old. The two-story regional mall offers over 1,000,000 SF of retail in the enclosed center, anchored by Macy's, JCPenney, and Dick's Sporting Goods. Today, the center is experiencing significant vacancy, as a result of the loss of Sears at one of its anchor locations.

The Shops at Wiregrass is a 1,000,000 SF modern, indoor/outdoor regional shopping mall with access to both Interstate 275 and 75. The center is anchored by Macy's, JCPenney, and Dillard's.

Tampa Premium Outlets is a 460,000 SF open-air shopping center owned by Simon Property Group. The Tampa Premium Outlets are accessible via Interstate 275 and 75, making them highly competitive for General Merchandise shopping trips.

Westfield Brandon is a 1,100,000 SF traditional shopping mall anchored by Macy's, JCPenney, Sears, and Dick's Sporting Goods. Built in 1995, the aging Westfield is well-positioned for redevelopment and reinvestment. Its location and proximity make the site competitive for regional shoppers.

Westfield Citrus Park offers 1,000,000 SF of retail in an enclosed regional shopping mall anchored by Macy's, JCPenney, Dillard's, and Dick's Sporting Goods. Citrus Park has over 200 stores.
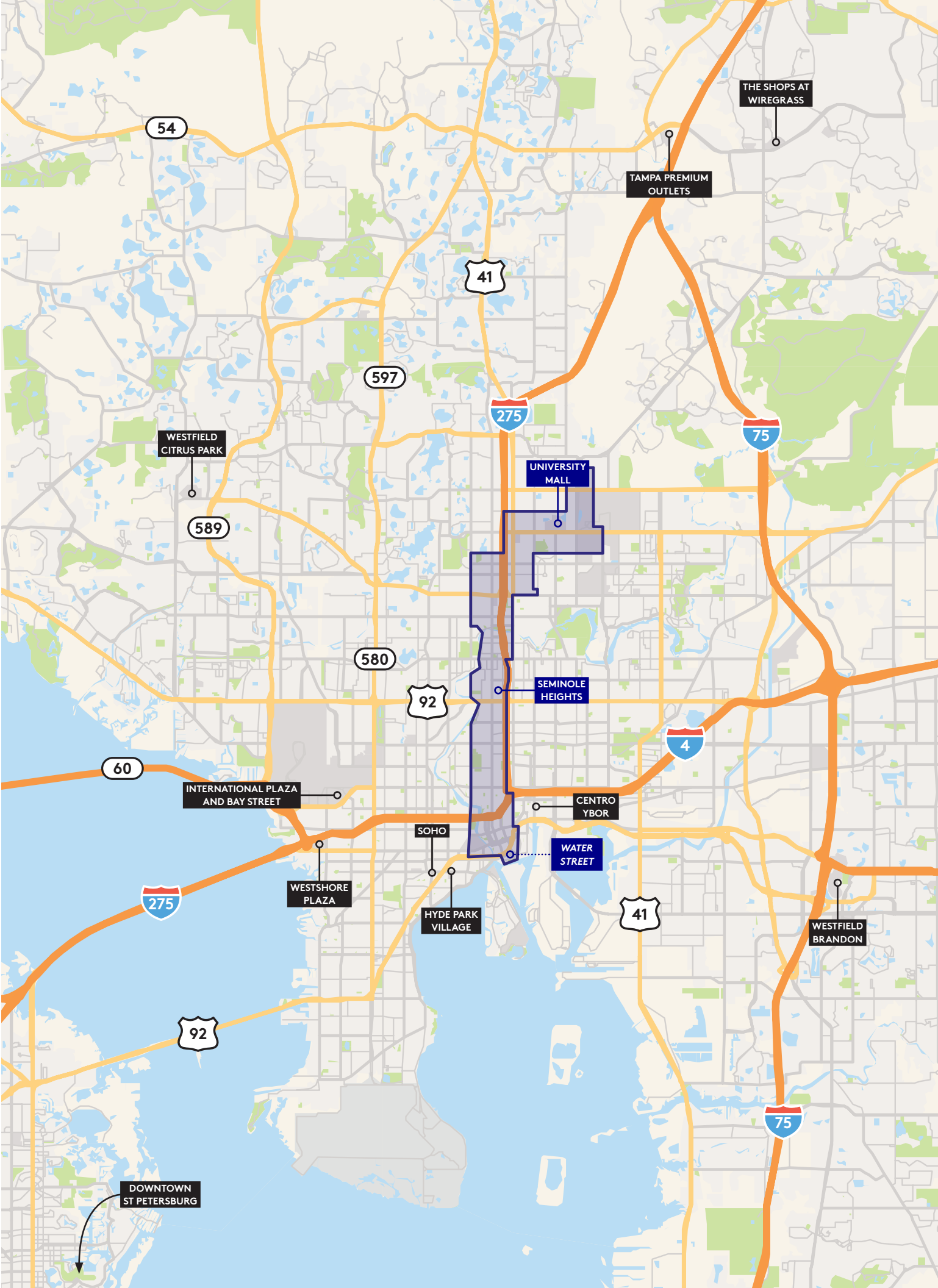
The Tampa Bay area has many vibrant commercial corridors lined with upscale Food & Beverage and General Merchandise tenants. In addition to local residents and daytime populations, these nodes also compete for leisure travelers and business visitors. Some of these outdoor nodes leverage historic characteristics, nearby natural features or landscaping as competitive advantages. Notable corridors include:

Hyde Park Village, located in the SoHo neighborhood, is a super-regional, upscale, outdoor lifestyle center. Hyde Park Village is an existing planned development with 270,000 SF of retail space. While not as large as other centers, the high-end retailers, significant landscaping, placemaking, and event activation draw customers from throughout the region.

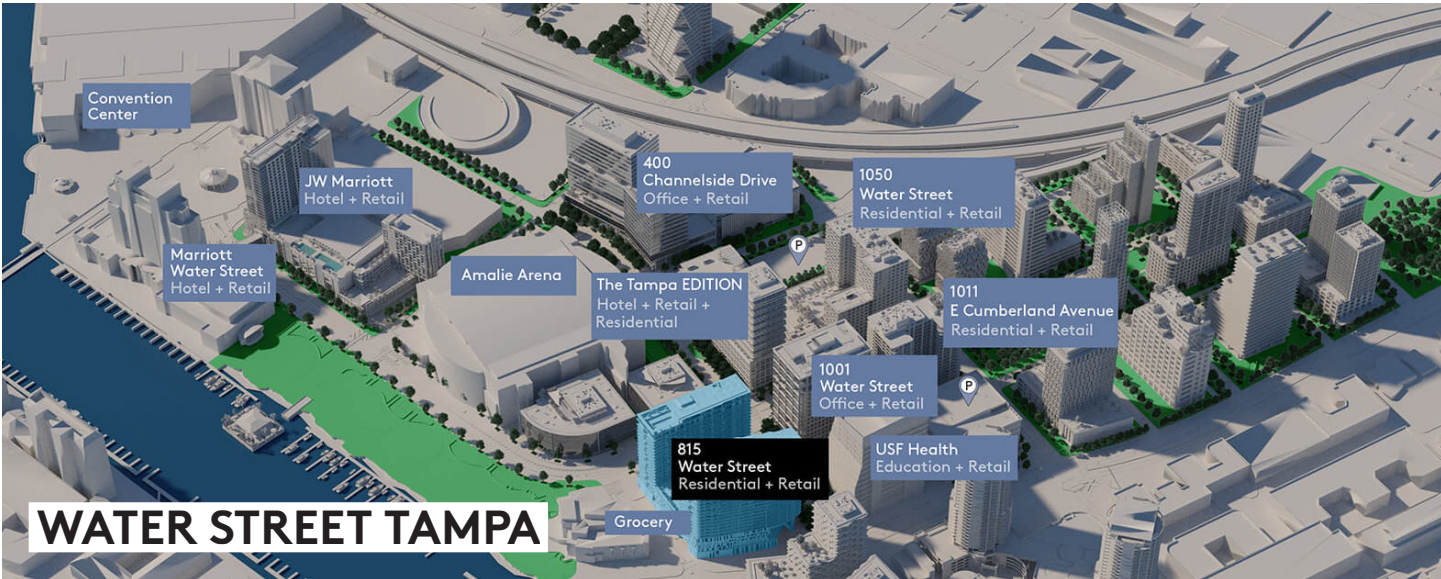**Centro Ybor**, also called Cigar City, is known for its historic charm. The corridor primarily runs along East 7th Avenue, where local Food and Beverage operators have seven blocks of contiguous retail frontage. This walkable environment competes for experiential trips and benefits from adjacent non-retail entertainment uses.

St. Petersburg is the second-largest city in the Tampa Bay MSA, with significant opportunities for waterfront dining, unique shopping experiences, and entertainment. While it is geographically separated from Tampa, a half-hour drive is commonplace for many work commutes. Central Avenue and the Grand Central District is known for street murals and public artwork that enhance the shopping corridors and help the walkable districts compete for experiential visits.

Water Street Tampa is a planned, mixed-use development along the waterfront of downtown Tampa. The project broke ground in 2018 and will complete Phase II by 2027. While some retail has been pre-leased to include full-service restaurants and bars, a majority of the 9 million square feet of commercial space is still under construction. Due to the adjacency to daytime populations, projected entertainment uses, and the parks and natural features of the water, Water Street Tampa is well-positioned to compete for destination-based retail trips in Tampa.

HYDE PARK VILLAGE

CENTRO YBOR

WATER STREET TAMPA

Convention Center

JW Marriott
Hotel + Retail

400 Channelside Drive
Office + Retail

1050 Water Street
Residential + Retail

Marriott Water Street
Hotel + Retail

Amalie Arena

The Tampa EDITION
Hotel + Retail + Residential

1011 E Cumberland Avenue
Residential + Retail

1001 Water Street
Office + Retail

USF Health
Education + Retail

815 Water Street
Residential + Retail

Grocery

ST. PETERSBURG

The North Tampa Retail Ecosystem: Local Competition

The map to the right highlights the neighborhood-oriented retail that offers local, convenience-based shopping and dining opportunities that typically include NG&S for regular purchases. These offerings and commercial environments typically attract and serve customers from a much smaller trade area, typically nearby residents and daytime employees.

The North Tampa local retail landscape is a suburban, auto-oriented market served predominantly by vehicle accessible strip centers and community centers. Major grocery tenants within this market include Save A Lot, Publix, Winn Dixie, and Whole Foods. These tenanting patterns shift based on local demographic patterns and site selection criteria. Significant retail momentum is present along Dale Mabry Highway (597), with clusters every three miles, mostly near major arterial roads. These include, but are not limited to:

The Palms of Carrollwood and **The Village Center,** on Village Drive. Notable commercial activity in Carrollwood includes **Carrollwood Center** and **Fountain Oaks**.

At the Intersection of Northdale Boulevard and Dale Mabry Highway (597) are several shopping centers and pad-site tenants. **Northdale Promenade** is an upscale community center anchored by Bealls and Winn-Dixie. Across the east side of Dale Mabry Highway is a pad-site Home Depot, Sam's Club, and on the southwest corner is a Whole Foods.

At the intersection of W Bearss Avenue and Dale Mabry Highway (597) is **Carrollwood Commons** and **North Pointe Plaza**. Carrollwood Commons is a community center anchored by Sprouts and Target; while North Pointe is a neighborhood center anchored by Walmart and Publix. These two centers benefit from adjacency to each other.

NORTHDALE PROMENADE
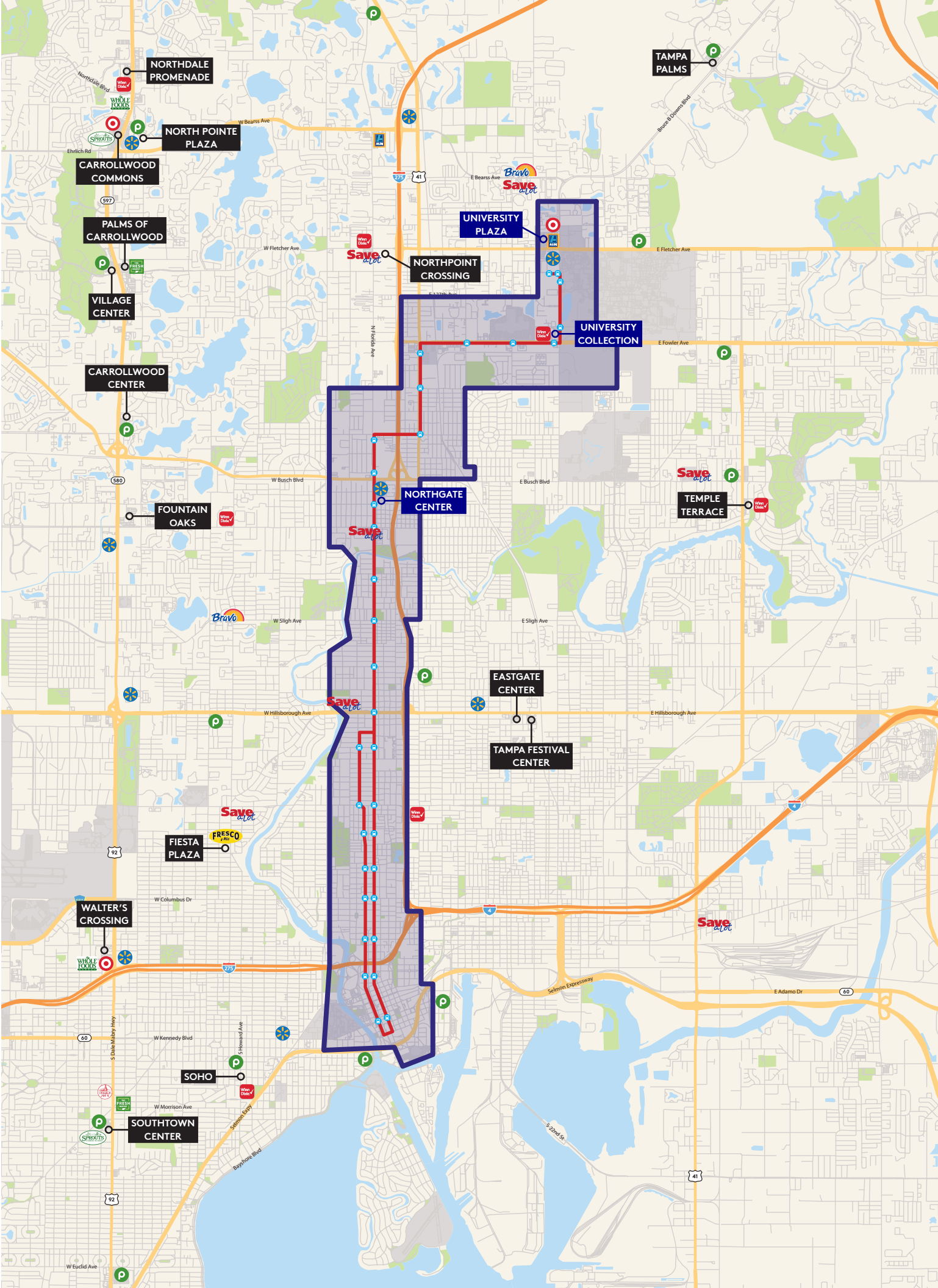
Fletcher Avenue also carries significant momentum for local shopping needs east-west. One center to note in this corridor includes **Northpoint Crossing**, which is anchored by Save A Lot.

The Tampa Palms Shopping Center, which is anchored by a Bealls and Publix, competes for trips from customers who live in New Tampa and commute via Bruce B Downs Boulevard.

Along Hillsborough Avenue is notable commercial momentum with several shopping centers. The cluster formed by **Tampa Festival Center**, a neighborhood serving shopping center anchored by Sanwa Farmer's Market, and **Eastgate Center**, a community center with a Ross Dress for Less, are examples of the competitive impact of this east-west thoroughfare.

Fiesta Plaza is a small neighborhood cluster slightly south of W MLK Jr Boulevard. Fiesta Plaza is anchored by Fresco Y Mas and Family Dollar, which is one of many dollar stores in the area.

South Howard Street (SoHo) is a neighborhood-oriented cluster of retail shops approximately two miles southwest of Downtown Tampa. The South Howard neighborhood serving shops likely compete for trips from residents who may work downtown for regular convenience-based trips closer to home.

CARROLLWOOD COMMONS

NORTH POINTE PLAZA

EASTGATE CENTER

SOUTH HOWARD STREET (SOHO)

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DOWNTOWN SUBAREA
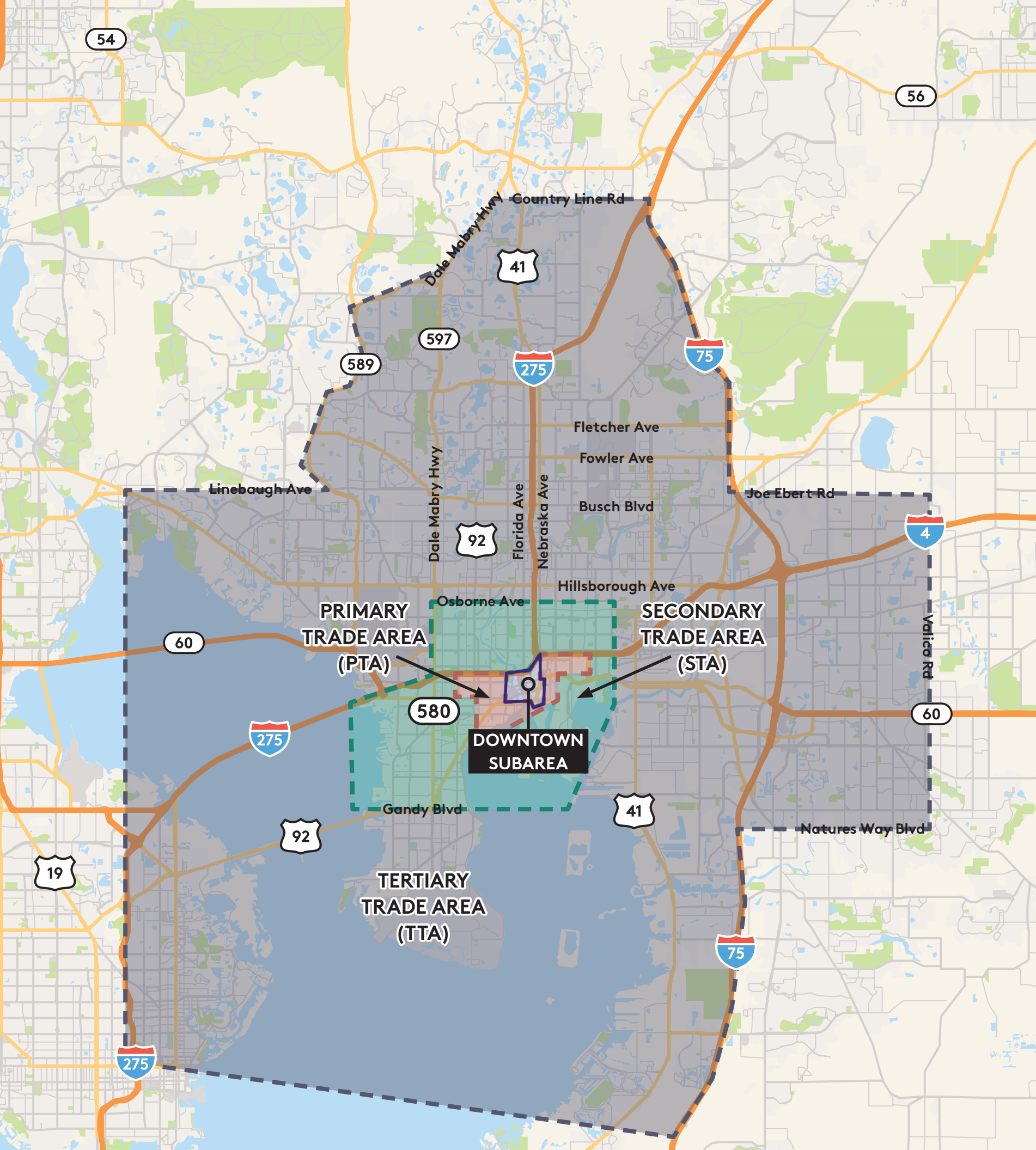
Downtown Subarea Trade Area Assessment

PRIMARY TRADE AREA (PTA)
The Primary Trade Area (PTA) represents the customers who are expected to patronize The Downtown Subarea for their shopping and dining needs at least once a week. The PTA is bound by S Howard Avenue to the east, Interstate 275/Interstate 4 to the north, and Hillsborough Bay and Adamo Drive to the southeast.

SECONDARY TRADE AREA (STA)
The Secondary Trade Area (STA) represents the customers who are expected to patronize the node for their shopping and dining needs at a modest frequency. Customers in this trade area have more convenient options closer to their home or work. The STA includes the Davis and Harbour islands, the neighborhoods to the north of W Gandy Boulevard, south of W Osborne Avenue, and between N Dale Mabry Highway and N 40th Street.

TERTIARY TRADE AREA (STA)
The Tertiary Trade Area (TTA) represents the customers traveling from a longer distance, typically 30-45 minutes, to patronize The Downtown Subarea for experienced-based shopping and dining trips. The TTA is substantially limited by other regional retail competitors, such as St. Petersburg, Tampa Premium Outlets, The Shops at Wiregrass, Westfield Brandon, and Citrus Park.

Downtown Subarea
Customer Profiles

RESIDENT POPULATION

PRIMARY TRADE AREA
PTA residents, on average, have higher educational attainment (54%) and higher incomes than the state's average. They are typically renters (65%) and non-family households (68%), which suggests a strong population of young professionals living downtown Tampa.

SECONDARY TRADE AREA
STA residents, on average, have higher educational attainment (40%), but slightly lower incomes than the state's average. They are typically home-owners (57%) and family households (54%), which suggests a strong population of older established couples living within the suburbs of downtown. Their access to cars (1.5 cars) allows them to easily access downtown Tampa.

TERTIARY TRADE AREA
TTA residents, on average, have lower educational attainment (31%) and lower incomes than both the PTA and STA. They are typically home-owners (55%) and family households (61%), which suggests a strong population of established suburban families living 30-45 minutes from downtown Tampa. They are extremely mobile (1.6 cars), which allows them to visit the downtown area on an occasional basis for experience-based shopping and dining trips.

DAYTIME POPULATION

EMPLOYEE POPULATION
The Downtown Tampa area has approximately 33,240 employees. The daytime population is employed predominantly in professional fields. These office workers are projected to have shopping behaviors aligned with employees who have disposable income and flexible schedules that align with typical retail store hours.

VISITOR POPULATION
The Downtown Tampa area has over 4,200 hotel rooms that support a business, leisure, and year-round cruise ship economy. The walkable, experiential aspect of the Central Business District and nearby main street environments welcome in crowds of visitors, cruise line workers, and guests.

HOUSEHOLDS
PTA - **14,338**
STA - **54,843**
TTA - **375,275**

DAYTIME POPULATION
PTA - **59,512**

MEDIAN HH INCOME
PTA - **$62,812**
STA - **$57,582**
TTA - **$55,380**
FLORIDA - **$58,586**

FAMILY HOUSEHOLDS
PTA - **32%**
STA - **54%**
TTA - **61%**
FLORIDA - **65%**

EDUCATION
(BACHELOR'S DEGREE +)
PTA - **54%**
STA - **40%**
TTA - **31%**
FLORIDA - **29%**

MOBILITY
(CARS PER HOUSEHOLD)
PTA - **1.3**
STA - **1.5**
TTA - **1.6**
FLORIDA - **1.7**

Source: Sitewise Report, US Census Bureau, US Bureau of Labor Statistics, Nielson Company/Claritas Demographics and Business Facts created for Streetsense 2020.

Downtown Subarea
Retail Demand

RETAIL DEMAND POTENTIAL

Downtown Tampa is in the midst of rapid growth and urban transformation. As new development occurs, the customer base will increase with new residential and commercial office occupation. Although new retail construction adds to the subarea's oversupply, appropriately-located, concentrated retail environments are under-represented downtown. Approximately one-third of the existing retail space throughout the downtown can be characterized as nonviable. As the core evolves, poor quality retail spaces will become unproductive and should be repurposed for other uses.

New transit stops in the downtown subarea will create added visibility at predictable times. These conditions will create an enhanced competitive advantage for retail-appropriate sites. As new opportunities to develop retail present, two key components of retail success should be considered.

Development in downtown increases the risk that the private and public sectors overestimate retail demand generated by new populations. Incremental demand calculations for the total amount of retail supported by occupants of new residential, office, and hotel construction is provided for the downtown subarea specifically.

DOWNTOWN SUBAREA RETAIL DEMAND INCREMENTAL (SF)

	RESIDENT-GENERATED DEMAND (PER HOUSEHOLD)	WORKPLACE-GENERATED DEMAND (PER 1,000 SF)	HOTEL-GENERATED DEMAND (PER HOTEL ROOM)
NG&S	3.0 SF	1.9 SF	3.1 SF
F&B	1.6 SF	2.1 SF	16.0 SF
GAFO	0.6 SF	0.6 SF	1.4 SF
TOTAL	5.2 SF	4.6 SF	20.5 SF

INCREMENTAL GROWTH POTENTIAL

New development programs will generate demand for different retail types at different volumes. The table above can be utilized to adjust retail demand as future opportunities to add populations to the downtown portion of the transit-oriented corridor are completed. New commercial development would need to occur within the boundary of the study area to impact the retail demand.

FLORIDA/NEBRASKA SUBAREA

Florida/Nebraska Subarea Trade Area Assessment

PRIMARY TRADE AREA (PTA)
The Primary Trade Area (PTA) represents the customers who are expected to patronize The Florida/Nebraska Subarea for their shopping and dining needs at least once a week. The PTA is bound by N Armenia Avenue to the west, N 30th Street to the east, E 109th Avenue to the north, and Interstate 275/Interstate 4 to the south.

SECONDARY TRADE AREA (STA)
The Secondary Trade Area (STA) represents the customers who are expected to patronize the node for their shopping and dining needs at a modest frequency. Customers in this trade area have more convenient options closer to their home or work. The STA includes the neighborhoods bounded by N Dale Mabry Highway to the west, N 56th Street to the east, E Fowler Avenue to the north, and Interstate 275/Interstate 4 to the south.
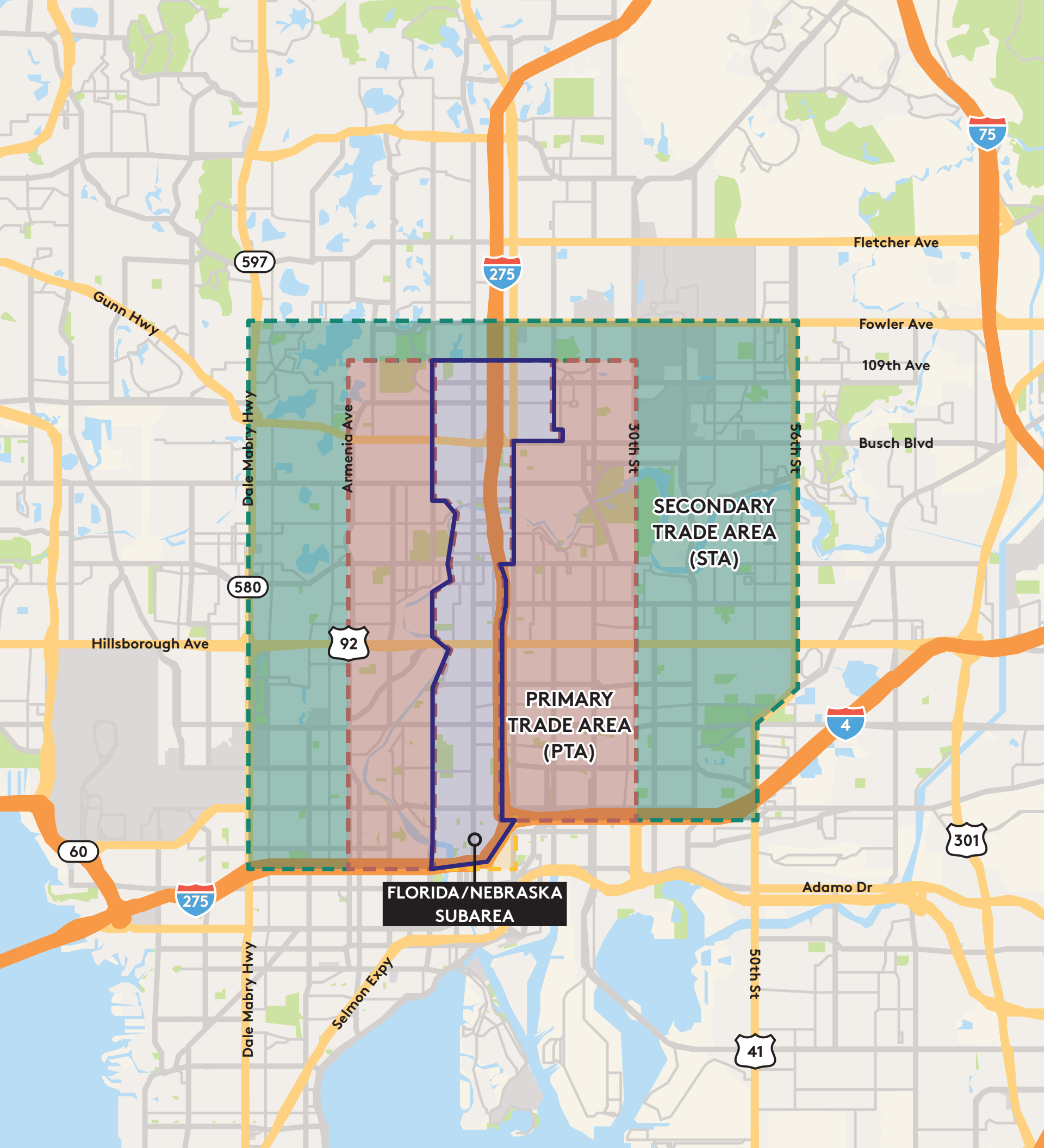
Florida/Nebraska Subarea
Customer Profiles

RESIDENT POPULATION

PRIMARY TRADE AREA

PTA residents, on average, have lower percentages of higher-educated population and lower household incomes than the state's average. They are typically home-owners (53%) and located within family households (61%) with a long length of tenure rate (14 years).

SECONDARY TRADE AREA

STA residents mirror conditions in the PTA with slightly lower rates of completed higher-education and household income. An important difference is that they are typically renters (57%) located within family households (58%). Their rental position is reflected by a shorter length of tenure (5 years) For potential retailers, this data point represents a customer base that will need to be recaptured every five years on average.

DAYTIME POPULATION

EMPLOYEE POPULATION

The Florida/Nebraska Subarea PTA has approximately 35,862 daytime employees, predominantly within the fields of healthcare, education, and retail. Employees rely on cars or public transportation to get to and from nearby retail offerings. Healthcare and education employees have inflexible schedules and are less likely to leave their campuses during the day.

HOUSEHOLDS
PTA - **42,715**
STA - **40,315**

DAYTIME POPULATION
PTA - **35,862**

MEDIAN HH INCOME
PTA - **$38,201**
STA - **$35,732**
FLORIDA - **$58,586**

FAMILY HOUSEHOLDS
PTA - **61%**
STA - **58%**
FLORIDA - **65%**

EDUCATION
(BACHELOR'S DEGREE +)
PTA - **20%**
STA - **18%**
FLORIDA - **29%**

MOBILITY
(CARS PER HOUSEHOLD)
PTA - **1.4**
STA - **1.4**
FLORIDA - **1.7**

Florida/Nebraska Subarea
Retail Demand

RETAIL DEMAND POTENTIAL

The retail opportunities for this section of the corridor are hindered by a considerable amount of underproductive stores and restaurants currently located there. Similar to the downtown subarea, but not to the same extent, the Florida/Nebraska subarea is undertaking a metamorphosis of its own. From its recent history as a mid-century, car-hop thoroughfare, the corridor is a rambling dispersion of pioneering eateries, discount chains, suburban convenience stores, and aging remnants of times passed.

This mixture has resulted in disorder that creates two critical obstacles for this subarea. First, the regional customer base either does not know what to make of the retail offerings on this roadway or does not consider it when making shopping and dining choices. By having a little bit of everything, it lacks definition and therefore, purpose of a retail trip. Second, because few retailers are co-located with other establishments, each business must work for and retain its own customer base. There are few opportunities for cross-shopping or discovery of other retail options when patronizing a business here.

The Florida/Nebraska subarea is overretailed to the extent that approximately one-eighth of its current inventory will remain viable for successful retail businesses over the next 20 years. Retail spaces that will thrive are those that are clustered near other establishments that attract the same clientele profile (i.e., Armature Works).

Caution is warranted for new tenants entering this subarea. Although several restaurants, coffee shops, and cafes are notable destinations, the prevailing, unmet retail demand in this subarea is for additional NG&S tenants. While this demand indicates the ability to support a small (<80,000 SF) grocery store or a larger store with a grocery component, a considerable amount of demand remains for services such as hair salons, nail salons, barber shops, dry cleaner/tailors, and banks.

New transit stops in the Florida/Nebraska subarea will create focal points for customer clustering and regional access. As a result, several stops will have the ability to concentrate retail opportunities at distinctive nodes.

FLORIDA/NEBRASKA SUBAREA RETAIL DEMAND INCREMENTAL (SF)

	RESIDENT-GENERATED DEMAND (PER HOUSEHOLD)	WORKPLACE-GENERATED DEMAND (PER 1,000 SF)	HOTEL-GENERATED DEMAND (PER HOTEL ROOM)
NG&S	1.5 SF	0.9 SF	N/A
F&B	0.9 SF	0.9 SF	N/A
GAFO	0.9 SF	0.9 SF	N/A
TOTAL	3.3 SF	2.7 SF	N/A

INCREMENTAL GROWTH POTENTIAL

New development programs will generate demand for different retail types at different volumes. Because it is quite easy to overestimate the amount of demand created from new development, planning efforts should consider the increments of retail demanded by these populations. The table above can be utilized to adjust retail demand as future opportunities to add populations to the transit-oriented corridor are developed. New commercial development would need to occur within the boundary of the study area to impact the retail demand.

FOWLER/USF SUBAREA

Fowler/USF Subarea
Trade Area Assessment

PRIMARY TRADE AREA (PTA)

The Primary Trade Area (PTA) represents the customers who are expected to patronize The Fowler/USF Subarea for their shopping and dining needs at least once a week. The PTA is bound by Armenia Avenue to the west, Interstate 275 to the north, forest and greenspace to the northeast, and the Hillsborough River to the south.

SECONDARY TRADE AREA (STA)

The Secondary Trade Area (STA) represents the customers who are expected to patronize the node for their shopping and dining needs at a modest frequency. Customers in this trade area have more convenient options closer to home or work. The STA includes the Carrollwood and Northdale neighborhoods to the west, areas east of Interstate 75, and communities north of Sligh Avenue.
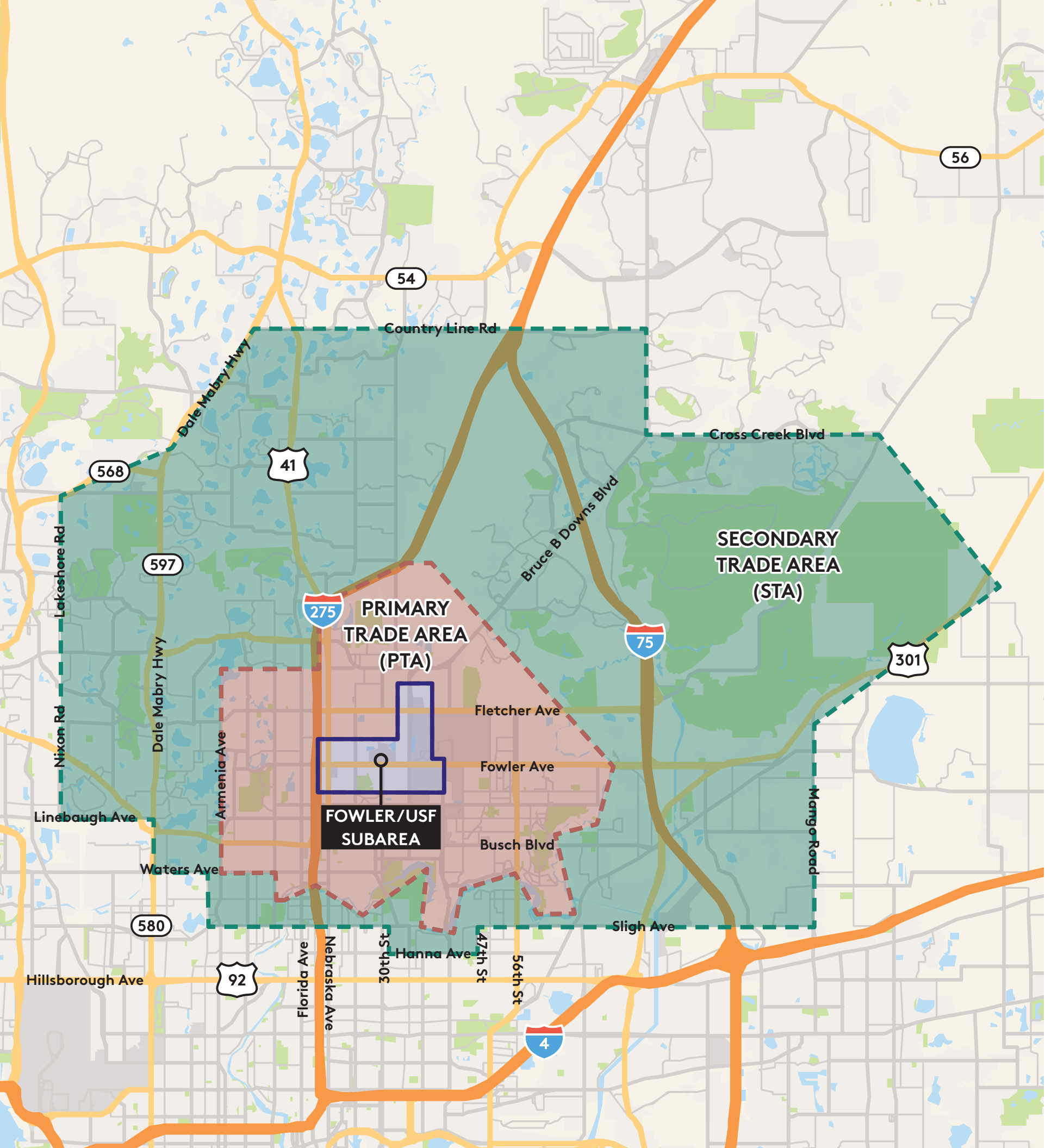
Fowler/USF Subarea
Customer Profiles

RESIDENT POPULATION

PRIMARY TRADE AREA
PTA residents, on average, have lower educational attainment (26%) and low household incomes compared to the national average, which could be in part due to the presence of the nearby USF student populations. They are typically renters (64%) and non-family households (49%), which is influenced by a strong student population living off-campus with roommates.

SECONDARY TRADE AREA
STA residents, on average, have high educational attainment (41%) with high household incomes compared to the national average. They are typically home-owners (62%) and family households (65%), suggesting a consistent customer base that is extremely mobile (1.4 cars) with more disposable income and flexibility regarding retail spending.

DAYTIME POPULATION

The total population of the Fowler/USF subarea more than doubles each day with the influx of employees, primarily from the following two industries:

EDUCATIONAL SERVICES
The University of South Florida (USF) Tampa Campus has a total faculty and staff population of 14,840 employees. The campus has several fast food offerings and mini food markets. Staff may not have sufficient time to leave campus and are more likely to stick to on-campus F&B.

HEALTHCARE AND SOCIAL ASSISTANCE
There are two major healthcare anchors within the area that employ a significant volume of people. The James A. Haley Veterans Hospital & Clinics has a total employee population of 5,200 employees. The AdventHealth Tampa Hospital has a total employee population of 4,300 employees. Employees who work in hospitals typically work irregular hours that do not align with regular businesses, which means they require quick services and flexible food offerings.

HOUSEHOLDS
PTA - **63,440**
STA - **74,000**

DAYTIME POPULATION
PTA - **72,630**

MEDIAN HH INCOME
PTA - **$35,655**
STA - **$66,166**
FLORIDA - **$58,586**

FAMILY HOUSEHOLDS
PTA - **51%**
STA - **65%**
FLORIDA - **65%**

EDUCATION
(BACHELOR'S DEGREE +)
PTA - **26%**
STA - **41%**
FLORIDA - **29%**

MOBILITY
(CARS PER HOUSEHOLD)
PTA - **1.4**
STA - **1.8**
FLORIDA - **1.7**

Fowler/USF Subarea
Retail Demand

RETAIL DEMAND POTENTIAL

The diversity of customer types in the Fowler/USF subarea creates challenges and unique opportunities simultaneously. Residents, employees, visitors, and students have few points of shopping and dining intersection; but for retail categories that meet universal needs, the Fowler/USF subarea is a treasure. Tenants such as low- and moderately-priced restaurants and bars, discount and second-hand merchandise stores, and convenience grocery stores are all applicable.

With sufficient depth in a single pillar of a customer base, more specific tenant types are possible. Although the number of students and residents occupy this part of Tampa in impressive amounts, the daily influx of employees represents the most significant opportunities the retail environment. However, the scheduling and timing constraints of the area's workforce are an important consideration. USF, the James A. Haley Veterans Hospital & Clinics and the AdventHealth Tampa Hospital are all institutions that offer convenient, on-site retail options to employees. The two hospitals, in particular, can be challenging for retailers to engage, as 24-hour shift work does not coincide with traditional retail hours-of-operation. Condition-specific retail solutions should be considered in this subarea, including parking for food trucks and additional security for 24-hour retail establishments. The addition of USF's research and technology hub, "RITHM at Uptown," in a portion of the University Mall will further enhance the stability of a employee-oriented retail environment here.

The Fowler/USF subarea is currently occupied by numerous repurposed or maligning large format retail establishments, especially in its western half. It is estimated that approximately one-fourth of the subarea's existing retail offerings have long-term viability as supportable retail spaces.

FOWLER/USF SUBAREA RETAIL DEMAND INCREMENTAL (SF)

	RESIDENT-GENERATED DEMAND (PER HOUSEHOLD)	WORKPLACE-GENERATED DEMAND (PER 1,000 SF)	HOTEL-GENERATED DEMAND (PER HOTEL ROOM)
NG&S	3.5 SF	5.0 SF	3.9 SF
F&B	1.2 SF	2.1 SF	8.1 SF
GAFO	0.3 SF	1.3 SF	1.3 SF
TOTAL	5.0 SF	8.4 SF	13.3 SF

INCREMENTAL GROWTH POTENTIAL

For the purposes of incremental growth projections in the Fowler/USF subarea, new student housing-generated retail demand should be calculated the same as a traditional household. The table above can be utilized to adjust retail demand as future opportunities to add populations to the transit-oriented corridor are developed. New commercial development would need to occur within the boundary of the study area to impact the retail demand.

HART Transit-Oriented Development Conclusion

The recommendations in this report are based upon an understanding of the market and reflect a potential retail development schemes with reasonable risk. The goal of this report is to articulate practical recommendations for retail that account for uncertainty in the development process. Additional retail development beyond the recommendations within this report would necessitate assuming higher risk. Greater financial uncertainty impacts the potential rate of return on a property.

FACTORS THAT INFLUENCE RETAIL SUCCESS
This retail market assessment accounts for the potential variables that influence retail's ability to succeed. These general factors may play a role in the viability of future retail within the The Hillsborough Area Regional Transit (HART) study area:

- Population and employment growth
- Long-term housing trends
- Long-term office and employee trends
- Changes in retail market clustering patterns
- Evolving shopping trends, including advancements in ecommerce distribution and delivery systems
- Tenanting strategies for planned and future development
- Shifting points of development momentum in the market
- Fluctuations in national and global macroeconomics

The following specific topics related to the HART TOD planning effort have potential impacts on the retail development programming:

Parking Provisions and Ratios. Perhaps one of the most significant unknowns related to this assignment especially is the potential impact of the new bus rapid transit line of parking needs for retail spaces. Due to the narrow low depths along the corridor, the ability to provide parking serves a major hurdle for retail growth. The further north and closer to Fowler Avenue traveled, the worse this problem gets.

Although it is possible that transit implementation may lessen the need for parking provisions along the corridor, this potential outcome remains unseen until service begins. Based on existing conditions along other lines of the streetcar system and BRT contexts in cities similar to Tampa, the community's current, car-oriented nature will require retail parking spaces, perhaps at a reduced rate, for the foreseeable future.

Retail: Transit Miscalculations. The addition of a transit line may play a role in evolving the surrounding real estate and retail landscape; however, the impacts on retail demand are often overestimated. Retail customers tend to shop and dine where convenient, typically near their home or work. For this reason, the increase of residents or employees near a transit stop does increase retail demand, because there are more customers. The introduction of transit rarely has substantial impacts on direct retail demand, as few customers will use the system solely as a means of traveling to shopping and dining opportunities.

For all of these reasons, the incremental demand increase tables have been provided for each of the subareas to ensure realistic expectations of potential retail growth created by new development.

Traffic Leveraging: Traffic can be a benefit to retail environments, as long as it is "behaving" – moving slowly, balanced with other modes, and reflective of pedestrian and bicycle activity. "Fixing" a traffic problem by allowing traffic to move too quickly through a retail environment can make vibrancy difficult. Retailers want to know their store is on a busy street, but not a congested thoroughfare.

Parking Provided: Tenants need opportunities to attract customers arriving by every available transportation mode – car, bus, on foot, bicycle – and having enough parking nearby is vital. On-street parking immediately in front of shops, centralized parking that allows for a "park once" experience, and excellent way-finding for midblock parking are all techniques that can accommodate customers needs, although there is not a "one size fits all" solution.

Uncluttered: Retail environments can suffer if that streetscape is overpopulated with fixtures and furnishings. A sidewalk's furniture, plantings, or patterns can create difficulties in travel and direct access to shops. Benches should face towards shops to encourage patronage. Trees should not obscure or block signage. Outdoor seating should be placed curbside, ensuring pedestrian traffic is alongside the storefront.

Flexible: Tenant space that is designed to be flexible will have the best chance of long-term sustainability and will be able to meet the needs of diverse users. Ideally, a space can be used by national, regional, independent, or local tenants for restaurant, retail, service, or retail-equivalent uses.

Appropriate: A storefront width module of 25 to 30 feet at a depth of 60 to 70 feet with clear height of ceilings at a minimum of 14' appeal to a wide number of tenants and retail types. This is important as turnover in the retail market occurs – a space built for one tenant can easily be reconfigured to accommodate a different tenant later.

HOW TO DECIDE IF TOD RETAIL APPROPRIATE?

While retail demand exists across the entire commercial corridor, not all retail demand is appropriate to translate into traditional, pedestrian-friendly, transit-oriented developments. Conversely, mixed-use TOD does not necessarily mean retail is warranted at the site if demand is not present.

The existing site conditions and characteristics of each subarea limit their ability to command the attraction and attention for retail to survive and thrive. TOD should be constructed where the circumstances permit, not necessarily where transit stops or stations presently exist today. Environments that indicate a site is appropriate for retail in a TOD include mixed-use, density, walkability, visibility, accessibility, double-sided streets, clustered buildings, available parking, and high vehicular and pedestrian traffic.

Transit-Oriented Retail Design & Planning Considerations

PATHWAYS AND PEDESTRIAN CONNECTIONS
Pathways should be short, continuous, and direct, allowing easy access to shopping and dining opportunities. These destinations should be within walking distance of the transit stop or station, meaning retail should be within at least a 400-600 meter radius to remain pedestrian-friendly. Pathways should be easy to find and follow, as well as universally accessible to wheelchairs, strollers, scooters, and other mobility aids, meaning walking surfaces should be flat and paved. Pathways should directly connect transit stops and stations to the front entrances of buildings, meaning routes should not be blocked by obstacles, such as parking, endless walls, or dead ends.

SEPARATE VEHICULAR AND PEDESTRIAN FUNCTIONS
Both vehicular and pedestrian pathways should be designed and developed to decrease points of conflict between driver and walker. The safety and security of both users is imperative in preventing the potential avoidance of a development out of fear or discomfort. Both physical and psychological barriers will impact the site's ability to attract customers. Points of connection, such as pick-up or drop-off alcoves should be set away from heavy traffic.

CLUSTER BUILDINGS
Buildings that are grouped together offer pedestrian-friendly, one-stop, shopping, and dining opportunities that provide their patrons convenient access to a variety of establishments on foot. A compact street network increases transit circulation and provides more choices for pedestrians. Developments built in a grid-based street pattern offer multiple points of access and entry to building and transit entrances while forming the overall framework and infrastructure for TOD.

MANAGE PARKING
By design, transit-oriented development decreases the need for personal vehicles, however, space for parking cars is still necessary. Convenient parking, pick-up, and drop-off areas are key in creating a space that is accessible to all users, transit, pedestrian, and vehicle-oriented alike. Both minimum and maximum parking standards should be set for each transit stop or station. Parking lots should be located behind buildings, keeping transit and building entrances oriented to the sidewalk to maintain a pedestrian-friendly environment that is safe and secure from cars.

DESIGN RETAIL ENVIRONMENTS FOR SUCCESS
Considerations in identifying and cultivating a successful, vibrant commercial corridor that maximizes retail sales, increases walkability, and attracts customers from inside and out of the neighborhood include, but are not limited to:

Concentrated: Retail environments work better when storefronts make up a continuous row, uninterrupted by blank walls, driveways, and other gaps in the fabric. Additionally, retail thrives in areas that are bookended by gateways to distinguish the commercial district from the surrounding neighborhood.

Double-sided: When both sides of a street include occupied retail, retailers have the greatest exposure to pedestrian and vehicular traffic by taking advantage of activity on both sides of the street.

Customer Adjacent: Retail establishments benefit from being as close to their customers as possible and prefer to be adjacent to sidewalks full of pedestrians, not placed behind parking lots or across a large open space. Minimizing distance between travel routes (sidewalks, streets) and storefronts maximizes a store or restaurant's visibility.

Accessible: Retailers thrive in locations that have the lowest number of obstacles between a potential customer and the front door. Impediments to customer accessibility include grade changes, ramps, parking spaces, curb cuts, and others.

Highly Visible: Not every street is a main street and not every location is a retail location. Highly visible corner lots on streets that have high traffic counts – and therefore high visibility – are a starting point for determining which places are suitable for retail concentrations.

Recommended Retail Priority Areas

Designating Retail Priority Areas establishes a targeted economic development strategy for the construction of new (preferably incorporated into mixed-use), ground-level retail space as well as the investments in storefront improvements. Along corridors such as Florida and Fowler Avenues, retail clustering, rather than scattering, ensures that each dollar spent will be more impactful and will provide a greater probability of catalyzing adjacent improvements by the private sector.

Market-appropriate retail micro-districts will be better able to meet the needs of the community without creating excess competition among retailers for a smaller share of overall customer spending. As the HART TOD corridor exists, new tenants to the market do not have a clear sense of anchored retail districts. As a result, businesses disperse, need to "make it on their own," and lack any of the benefits of contributing to a small clustering of establishments that could share the same customer base. In isolation, the retail business failure rate rises dramatically.

Several locations along the HART TOD corridor have been identified as possible locations for Retail Priority Areas (RPA). These blocks reflect the inclusion of a market strategy in a planning diagram. At its core, RPAs indicate a zone where market and site conditions combine to support long-term retail stability with in a particular geography. Inherent in this designation is that understanding that areas outside of the RPA are not as well-suited for retail development and investment.

1. East Fowler Avenue from North 15th Street to North 56th Street

2. North Florida Avenue from East Bird Street to West Floriland Avenue

3. Four corners at intersection of North Florida Avenue and West Hanna Avenue

4. Blocks south of the intersection of North Florida and East Hillsborough Avenues, specific designation for large format retail development

5. Industrial and Warehouse blocks north of intersection of North Florida Avenue and Violet Street

6. North Florida Avenue from East Virginia Avenue to East North Bay Street

7. Four corners at intersection of North Tampa Street and East Columbus Drive

8. North Franklin Street from East Kay Street to East 7th Avenue
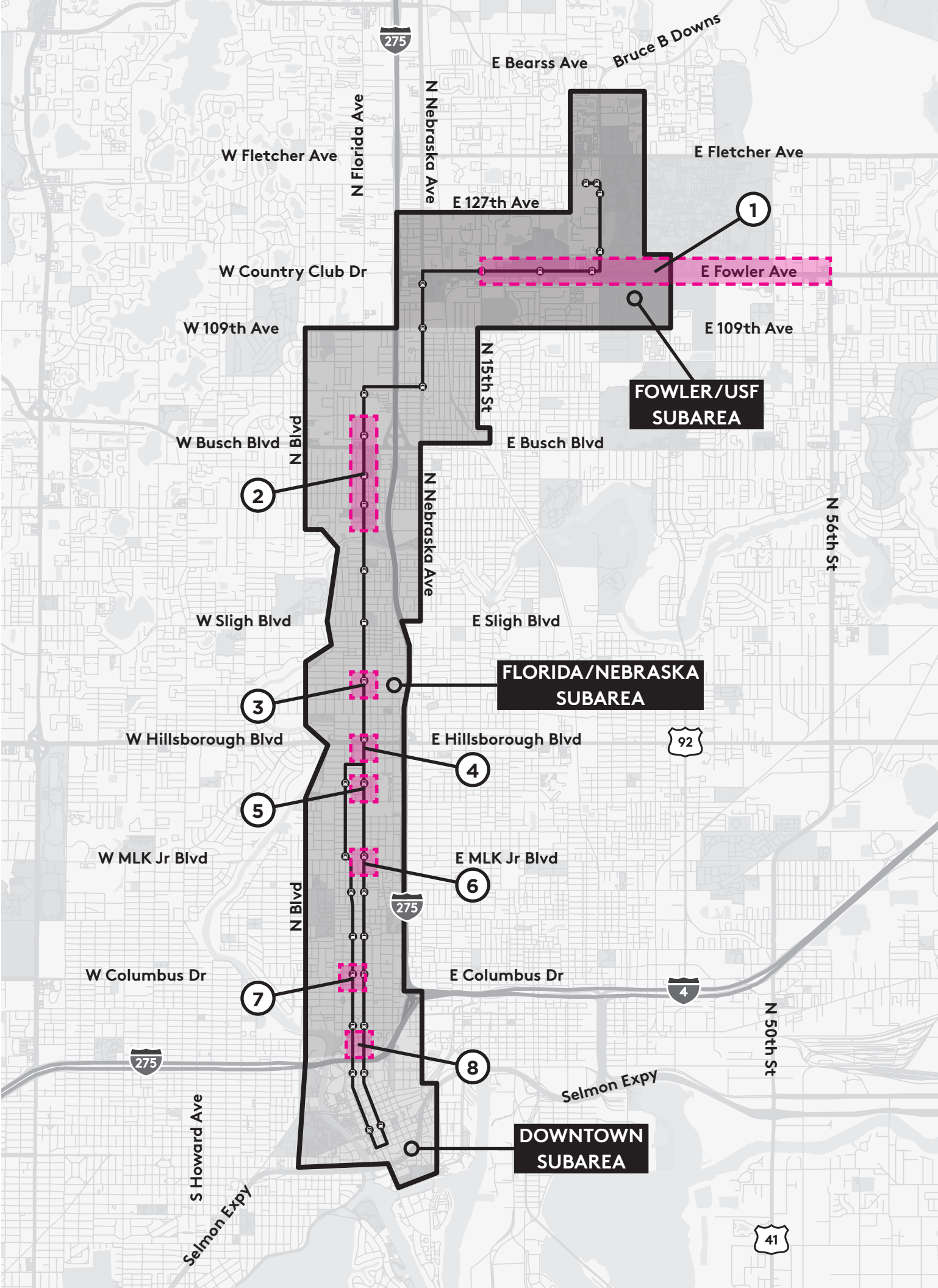
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Fowler/USF Subarea
Technical Appendix

TABLE 1. FOWLER/USF SUBAREA - RESIDENT-GENERATED RETAIL DEMAND - PRIMARY TRADE AREA - 2020

Category	Capture Rate	Total Captured Expenditures	Retail Sales per SF (Low)	Total Demand- Low Productivity (SF)	Retail Sales per SF (High)	Total Demand- High Productivity (SF)
Food At Home	38.00%	$82,230,955	$398	206,610	$517	159,054
Alcohol at Home	35.00%	$4,329,848	$254	17,047	$310	13,967
Personal/Household Care Goods/Services	38.00%	$22,926,309	$526	43,586	$791	28,984
Pet Food & Services	25.00%	$2,775,544	$162	17,133	$273	10,167
Apparel Services	35.00%	$2,176,026	$183	11,891	$265	8,211
NG&S SUBTOTAL		$114,438,682		296,267		220,384
Full-Service	25.00%	$17,589,017	$500	35,178	$750	23,452
Fast Food	30.00%	$23,809,407	$400	59,524	$600	39,682
Alcohol Away from Home	25.00%	$2,299,736	$500	4,599	$750	3,066
Snacks & Non-Alcoholic Beverages	25.00%	$3,267,212	$300	10,891	$400	8,168
F&B SUBTOTAL		$46,965,372		110,192		74,369
Home Furnishings	3.00%	$2,478,005	$310	7,994	$325	7,625
Apparel	3.00%	$2,403,779	$375	6,410	$420	5,723
Electronics, Sports and Music Equipment	3.00%	$466,291	$430	1,084	$462	1,009
Reading/Education	3.00%	$363,517	$300	1,212	$360	1,010
Automotive Equipment	3.00%	$236,001	$188	1,255	$241	979
GAFO SUBTOTAL		$5,947,594		17,955		16,346
RESIDENT-GENERATED RETAIL DEMAND:		$167,351,648		424,414		311,098

Source: U.S. Census Bureau, Claritas, Inc., Streetsense

TABLE 2. FOWLER/USF SUBAREA - RESIDENT-GENERATED RETAIL DEMAND - SECONDARY TRADE AREA - 2020

Category	Capture Rate	Total Captured Expenditures	Retail Sales per SF (Low)	Total Demand- Low Productivity (SF)	Retail Sales per SF (High)	Total Demand- High Productivity (SF)
Food At Home	10.00%	$36,703,008	$398	92,219	$517	70,992
Alcohol at Home	8.00%	$2,018,665	$254	7,948	$310	6,512
Personal/Household Care Goods/Services	8.00%	$7,766,830	$526	14,766	$791	9,819
Pet Food & Services	5.00%	$1,117,370	$162	6,897	$273	4,093
Apparel Services	5.00%	$488,387	$183	2,669	$265	1,843
NG&S SUBTOTAL		$48,094,260		124,498		93,259
Full-Service	15.00%	$21,366,923	$500	42,734	$750	28,489
Fast Food	12.00%	$15,894,770	$400	39,737	$600	26,491
Alcohol Away from Home	7.00%	$1,357,123	$500	2,714	$750	1,809
Snacks & Non-Alcoholic Beverages	7.00%	$1,621,296	$300	5,404	$400	4,053
F&B SUBTOTAL		$40,240,112		90,589		60,843
Home Furnishings	2.00%	$3,386,148	$310	10,923	$325	10,419
Apparel	2.00%	$2,982,119	$375	7,952	$420	7,100
Electronics, Sports and Music Equipment	2.00%	$506,146	$430	1,177	$462	1,096
Reading/Education	2.00%	$386,270	$300	1,288	$360	1,073
Automotive Equipment	2.00%	$263,433	$188	1,401	$241	1,093
GAFO SUBTOTAL		$7,524,117		22,741		20,781
RESIDENT-GENERATED RETAIL DEMAND:		$95,858,489		237,829		174,883

Source: U.S. Census Bureau, Claritas, Inc., Streetsense

TABLE 3. FOWLER/USF SUBAREA - RESIDENT-GENERATED RETAIL DEMAND - CUMULATIVE - 2020

Category	Total Captured Expenditures	Retail Sales per SF (Low)	Total Demand- Low Productivity (SF)	Retail Sales per SF (High)	Total Demand- High Productivity (SF)
Food At Home	$118,933,963	$398	298,829	$517	230,046
Alcohol at Home	$6,348,514	$254	24,994	$310	20,479
Personal/Household Care Goods/Services	$30,693,139	$526	58,352	$791	38,803
Pet Food & Services	$3,892,914	$162	24,030	$273	14,260
Apparel Services	$2,664,413	$183	14,560	$265	10,054
NG&S SUBTOTAL	$162,532,942		420,765		313,643
Full-Service	$38,955,940	$500	77,912	$750	51,941
Fast Food	$39,704,178	$400	99,260	$600	66,174
Alcohol Away from Home	$3,656,860	$500	7,314	$750	4,876
Snacks & Non-Alcoholic Beverages	$4,888,508	$300	16,295	$400	12,221
F&B SUBTOTAL	$87,205,485		200,781		135,212
Home Furnishings	$5,864,154	$310	18,917	$325	18,044
Apparel	$5,385,899	$375	14,362	$420	12,824
Electronics, Sports and Music Equipment	$972,438	$430	2,261	$462	2,105
Reading/Education	$749,786	$300	2,499	$360	2,083
Automotive Equipment	$499,433	$188	2,657	$241	2,072
GAFO SUBTOTAL	$13,471,710		40,696		37,127
RESIDENT-GENERATED RETAIL DEMAND:	$263,210,137		662,243		485,982

Source: U.S. Census Bureau, Claritas, Inc., Streetsense

TABLE 4. FOWLER/USF SUBAREA - EMPLOYEE-GENERATED RETAIL DEMAND (HEALTHCARE) - PRIMARY TRADE AREA - 2020

Category	Capture Rate	Total Captured Expenditures	Retail Sales per SF (Low)	Total Demand- Low Productivity (SF)	Retail Sales per SF (High)	Total Demand- High Productivity (SF)
NG&S SUBTOTAL	20.00%	$8,531,064	$305	28,007	$431	19,784
F&B SUBTOTAL	30.00%	$8,501,369	$425	20,003	$625	13,602
GAFO SUBTOTAL	5.00%	$1,806,117	$321	5,634	$362	4,995
EMPLOYEE-GENERATED RETAIL DEMAND:		$18,838,550		53,644		38,381

Source: U.S. Census Bureau, Claritas, Inc., Streetsense

TABLE 5. FOWLER/USF SUBAREA - EMPLOYEE-GENERATED RETAIL DEMAND (EDUCATION) - PRIMARY TRADE AREA - 2020

Category	Capture Rate	Total Captured Expenditures	Retail Sales per SF (Low)	Total Demand- Low Productivity (SF)	Retail Sales per SF (High)	Total Demand- High Productivity (SF)
NG&S SUBTOTAL	20.00%	$4,921,721	$305	16,158	$431	11,414
F&B SUBTOTAL	10.00%	$1,634,863	$425	3,847	$625	2,616
GAFO SUBTOTAL	5.00%	$1,041,981	$321	3,250	$362	2,882
EMPLOYEE-GENERATED RETAIL DEMAND:		$7,598,565		23,255		16,911

Source: U.S. Census Bureau, Claritas, Inc., Streetsense

TABLE 6. FOWLER/USF SUBAREA - EMPLOYEE-GENERATED RETAIL DEMAND (RETAIL/OTHER) - PRIMARY TRADE AREA - 2020

Category	Capture Rate	Total Captured Expenditures	Retail Sales per SF (Low)	Total Demand- Low Productivity (SF)	Retail Sales per SF (High)	Total Demand- High Productivity (SF)
NG&S SUBTOTAL	40.00%	$31,516,392	$305	103,468	$431	73,090
F&B SUBTOTAL	35.00%	$18,320,568	$425	43,107	$625	29,313
GAFO SUBTOTAL	10.00%	$6,672,354	$321	20,812	$362	18,452
EMPLOYEE-GENERATED RETAIL DEMAND:		$56,509,314		167,387		120,855

Source: U.S. Census Bureau, Claritas, Inc., Streetsense

TABLE 7. FOWLER/USF SUBAREA - CUMULATIVE RETAIL DEMAND - 2020

Category		Total Captured Expenditures	Total Demand- Low Productivity (SF)	Total Demand- High Productivity (SF)
NG&S SUBTOTAL		$207,502,120	568,399	417,931
F&B SUBTOTAL		$115,662,285	267,738	180,743
GAFO SUBTOTAL		$22,992,162	70,392	63,456
CUMULATIVE RETAIL DEMAND:		$346,156,566	906,529	662,130

Source: U.S. Census Bureau, Claritas, Inc., Streetsense

TABLE 8. FOWLER/USF SUBAREA - RESIDENT-GENERATED RETAIL DEMAND - PRIMARY TRADE AREA - 2025

Category	Capture Rate	Total Captured Expenditures	Retail Sales per SF (Low)	Total Demand- Low Productivity (SF)	Retail Sales per SF (High)	Total Demand- High Productivity (SF)
Food At Home	38.00%	$87,477,290	$398	219,792	$517	169,202
Alcohol at Home	35.00%	$4,606,093	$254	18,134	$310	14,858
Personal/Household Care Goods/Services	38.00%	$24,389,007	$526	46,367	$791	30,833
Pet Food & Services	25.00%	$2,952,623	$162	18,226	$273	10,815
Apparel Services	35.00%	$2,314,857	$183	12,649	$265	8,735
NG&S SUBTOTAL		**$121,739,870**		**315,169**		**234,444**
Full-Service	25.00%	$18,711,197	$500	37,422	$750	24,948
Fast Food	30.00%	$25,328,447	$400	63,321	$600	42,214
Alcohol Away from Home	25.00%	$2,446,459	$500	4,893	$750	3,262
Snacks & Non-Alcoholic Beverages	25.00%	$3,475,660	$300	11,586	$400	8,689
F&B SUBTOTAL		**$49,961,763**		**117,222**		**79,113**
Home Furnishings	3.00%	$2,636,102	$310	8,504	$325	8,111
Apparel	3.00%	$2,557,141	$375	6,819	$420	6,088
Electronics, Sports and Music Equipment	3.00%	$496,041	$430	1,154	$462	1,074
Reading/Education	3.00%	$386,709	$300	1,289	$360	1,074
Automotive Equipment	3.00%	$251,057	$188	1,335	$241	1,042
GAFO SUBTOTAL		**$6,327,050**		**19,101**		**17,389**
RESIDENT-GENERATED RETAIL DEMAND:		**$178,028,683**		**451,491**		**330,947**

Source: U.S. Census Bureau, Claritas, Inc., Streetsense

TABLE 9. FOWLER/USF SUBAREA - RESIDENT-GENERATED RETAIL DEMAND - SECONDARY TRADE AREA - 2025

Category	Capture Rate	Total Captured Expenditures	Retail Sales per SF (Low)	Total Demand- Low Productivity (SF)	Retail Sales per SF (High)	Total Demand- High Productivity (SF)
Food At Home	10.00%	$39,323,603	$398	98,803	$517	76,061
Alcohol at Home	8.00%	$2,162,798	$254	8,515	$310	6,977
Personal/Household Care Goods/Services	8.00%	$8,321,382	$526	15,820	$791	10,520
Pet Food & Services	5.00%	$1,197,150	$162	7,390	$273	4,385
Apparel Services	5.00%	$523,258	$183	2,859	$265	1,975
NG&S SUBTOTAL		$51,528,190		133,387		99,918
Full-Service	15.00%	$22,892,521	$500	45,785	$750	30,523
Fast Food	12.00%	$17,029,657	$400	42,574	$600	28,383
Alcohol Away from Home	7.00%	$1,454,022	$500	2,908	$750	1,939
Snacks & Non-Alcoholic Beverages	7.00%	$1,737,057	$300	5,790	$400	4,343
F&B SUBTOTAL		$43,113,256		97,057		65,187
Home Furnishings	2.00%	$3,627,919	$310	11,703	$325	11,163
Apparel	2.00%	$3,195,043	$375	8,520	$420	7,607
Electronics, Sports and Music Equipment	2.00%	$542,285	$430	1,261	$462	1,174
Reading/Education	2.00%	$413,849	$300	1,379	$360	1,150
Automotive Equipment	2.00%	$282,242	$188	1,501	$241	1,171
GAFO SUBTOTAL		$8,061,339		24,365		22,265
RESIDENT-GENERATED RETAIL DEMAND:		$102,702,785		254,810		187,370

Source: U.S. Census Bureau, Claritas, Inc., Streetsense

TABLE 10. FOWLER/USF SUBAREA - RESIDENT-GENERATED RETAIL DEMAND - CUMULATIVE - 2025

Category	Total Captured Expenditures	Retail Sales per SF (Low)	Total Demand- Low Productivity (SF)	Retail Sales per SF (High)	Total Demand- High Productivity (SF)
Food At Home	$126,800,893	$398	318,595	$517	245,263
Alcohol at Home	$6,768,891	$254	26,649	$310	21,835
Personal/Household Care Goods/Services	$32,710,389	$526	62,187	$791	41,353
Pet Food & Services	$4,149,773	$162	25,616	$273	15,201
Apparel Services	$2,838,114	$183	15,509	$265	10,710
NG&S SUBTOTAL	$173,268,060		448,556		334,362
Full-Service	$41,603,717	$500	83,207	$750	55,472
Fast Food	$42,358,104	$400	105,895	$600	70,597
Alcohol Away from Home	$3,900,481	$500	7,801	$750	5,201
Snacks & Non-Alcoholic Beverages	$5,212,716	$300	17,376	$400	13,032
F&B SUBTOTAL	$93,075,019		214,279		144,301
Home Furnishings	$6,264,022	$310	20,207	$325	19,274
Apparel	$5,752,183	$375	15,339	$420	13,696
Electronics, Sports and Music Equipment	$1,038,326	$430	2,415	$462	2,247
Reading/Education	$800,559	$300	2,669	$360	2,224
Automotive Equipment	$533,299	$188	2,837	$241	2,213
GAFO SUBTOTAL	$14,388,389		43,466		39,654
RESIDENT-GENERATED RETAIL DEMAND:	$280,731,469		706,301		518,316

Source: U.S. Census Bureau, Claritas, Inc., Streetsense

TABLE 11. FOWLER/USF SUBAREA - EMPLOYEE-GENERATED RETAIL DEMAND (HEALTHCARE) - PRIMARY TRADE AREA - 2025

Category	Capture Rate	Total Captured Expenditures	Retail Sales per SF (Low)	Total Demand- Low Productivity (SF)	Retail Sales per SF (High)	Total Demand- High Productivity (SF)
NG&S SUBTOTAL	20.00%	$9,045,914	$305	29,698	$431	20,978
F&B SUBTOTAL	30.00%	$9,014,426	$425	21,210	$625	14,423
GAFO SUBTOTAL	5.00%	$1,915,116	$321	5,974	$362	5,296
EMPLOYEE-GENERATED RETAIL DEMAND:		$19,975,456		56,882		40,698

Source: U.S. Census Bureau, Claritas, Inc., Streetsense

TABLE 12. FOWLER/USF SUBAREA - EMPLOYEE-GENERATED RETAIL DEMAND (EDUCATION) - PRIMARY TRADE AREA - 2025

Category	Capture Rate	Total Captured Expenditures	Retail Sales per SF (Low)	Total Demand- Low Productivity (SF)	Retail Sales per SF (High)	Total Demand- High Productivity (SF)
NG&S SUBTOTAL	20.00%	$5,218,747	$305	17,133	$431	12,103
F&B SUBTOTAL	10.00%	$1,733,527	$425	4,079	$625	2,774
GAFO SUBTOTAL	5.00%	$1,104,864	$321	3,446	$362	3,055
EMPLOYEE-GENERATED RETAIL DEMAND:		$8,057,139		24,658		17,932

Source: U.S. Census Bureau, Claritas, Inc., Streetsense

TABLE 13. FOWLER/USF SUBAREA - EMPLOYEE-GENERATED RETAIL DEMAND (RETAIL/OTHER) - PRIMARY TRADE AREA - 2025

Category	Capture Rate	Total Captured Expenditures	Retail Sales per SF (Low)	Total Demand- Low Productivity (SF)	Retail Sales per SF (High)	Total Demand- High Productivity (SF)
NG&S SUBTOTAL	40.00%	$33,418,406	$305	109,712	$431	77,501
F&B SUBTOTAL	35.00%	$19,426,214	$425	45,709	$625	31,082
GAFO SUBTOTAL	10.00%	$7,075,031	$321	22,068	$362	19,566
EMPLOYEE-GENERATED RETAIL DEMAND:		$59,919,651		177,489		128,149

Source: U.S. Census Bureau, Claritas, Inc., Streetsense

TABLE 14. FOWLER/USF SUBAREA - CUMULATIVE RETAIL DEMAND - 2025

Category		Total Captured Expenditures	Total Demand- Low Productivity (SF)	Total Demand- High Productivity (SF)
NG&S SUBTOTAL		$220,951,128	605,099	444,944
F&B SUBTOTAL		$123,249,187	154,205	192,580
GAFO SUBTOTAL		$24,483,399	74,953	67,571
CUMULATIVE RETAIL DEMAND:		$368,683,715	834,258	705,095

Source: U.S. Census Bureau, Claritas, Inc., Streetsense

TABLE 15. FOWLER/USF SUBAREA - RESIDENT-GENERATED RETAIL DEMAND - PRIMARY TRADE AREA - 2030

Category	Capture Rate	Total Captured Expenditures	Retail Sales per SF (Low)	Total Demand- Low Productivity (SF)	Retail Sales per SF (High)	Total Demand- High Productivity (SF)
Food At Home	38.00%	$93,058,341	$398	233,815	$517	179,997
Alcohol at Home	35.00%	$4,899,961	$254	19,291	$310	15,806
Personal/Household Care Goods/Services	38.00%	$25,945,026	$526	49,325	$791	32,800
Pet Food & Services	25.00%	$3,141,001	$162	19,389	$273	11,505
Apparel Services	35.00%	$2,462,545	$183	13,457	$265	9,293
NG&S SUBTOTAL		$129,506,874		335,277		249,402
Full-Service	25.00%	$19,904,971	$500	39,810	$750	26,540
Fast Food	30.00%	$26,944,402	$400	67,361	$600	44,907
Alcohol Away from Home	25.00%	$2,602,544	$500	5,205	$750	3,470
Snacks & Non-Alcoholic Beverages	25.00%	$3,697,407	$300	12,325	$400	9,244
F&B SUBTOTAL		$53,149,324		124,701		84,161
Home Furnishings	3.00%	$2,804,286	$310	9,046	$325	8,629
Apparel	3.00%	$2,720,286	$375	7,254	$420	6,477
Electronics, Sports and Music Equipment	3.00%	$527,688	$430	1,227	$462	1,142
Reading/Education	3.00%	$411,381	$300	1,371	$360	1,143
Automotive Equipment	3.00%	$267,075	$188	1,421	$241	1,108
GAFO SUBTOTAL		$6,730,716		20,319		18,499
RESIDENT-GENERATED RETAIL DEMAND:		$189,386,913		480,297		352,061

Source: U.S. Census Bureau, Claritas, Inc., Streetsense

TABLE 16. FOWLER/USF SUBAREA - RESIDENT-GENERATED RETAIL DEMAND - SECONDARY TRADE AREA - 2030

Category	Capture Rate	Total Captured Expenditures	Retail Sales per SF (Low)	Total Demand- Low Productivity (SF)	Retail Sales per SF (High)	Total Demand- High Productivity (SF)
Food At Home	10.00%	$42,131,308	$398	105,858	$517	81,492
Alcohol at Home	8.00%	$2,317,222	$254	9,123	$310	7,475
Personal/Household Care Goods/Services	8.00%	$8,915,528	$526	16,950	$791	11,271
Pet Food & Services	5.00%	$1,282,627	$162	7,917	$273	4,698
Apparel Services	5.00%	$560,618	$183	3,063	$265	2,116
NG&S SUBTOTAL		$55,207,303		142,911		107,052
Full-Service	15.00%	$24,527,047	$500	49,054	$750	32,703
Fast Food	12.00%	$18,245,575	$400	45,614	$600	30,409
Alcohol Away from Home	7.00%	$1,557,839	$500	3,116	$750	2,077
Snacks & Non-Alcoholic Beverages	7.00%	$1,861,083	$300	6,204	$400	4,653
F&B SUBTOTAL		$46,191,543		103,987		69,842
Home Furnishings	2.00%	$3,886,953	$310	12,539	$325	11,960
Apparel	2.00%	$3,423,169	$375	9,128	$420	8,150
Electronics, Sports and Music Equipment	2.00%	$581,004	$430	1,351	$462	1,258
Reading/Education	2.00%	$443,398	$300	1,478	$360	1,232
Automotive Equipment	2.00%	$302,394	$188	1,608	$241	1,255
GAFO SUBTOTAL		$8,636,918		26,105		23,854
RESIDENT-GENERATED RETAIL DEMAND:		$110,035,764		273,003		200,748

Source: U.S. Census Bureau, Claritas, Inc., Streetsense

TABLE 17. FOWLER/USF SUBAREA - RESIDENT-GENERATED RETAIL DEMAND - CUMULATIVE - 2030

Category	Total Captured Expenditures	Retail Sales per SF (Low)	Total Demand- Low Productivity (SF)	Retail Sales per SF (High)	Total Demand- High Productivity (SF)
Food At Home	$135,189,649	$398	339,672	$517	261,489
Alcohol at Home	$7,217,183	$254	28,414	$310	23,281
Personal/Household Care Goods/Services	$34,860,554	$526	66,275	$791	44,071
Pet Food & Services	$4,423,627	$162	27,306	$273	16,204
Apparel Services	$3,023,163	$183	16,520	$265	11,408
NG&S SUBTOTAL	$184,714,177		478,188		356,453
Full-Service	$44,432,018	$500	88,864	$750	59,243
Fast Food	$45,189,977	$400	112,975	$600	75,317
Alcohol Away from Home	$4,160,383	$500	8,321	$750	5,547
Snacks & Non-Alcoholic Beverages	$5,558,489	$300	18,528	$400	13,896
F&B SUBTOTAL	$99,340,866		228,688		154,003
Home Furnishings	$6,691,238	$310	21,585	$325	20,588
Apparel	$6,143,455	$375	16,383	$420	14,627
Electronics, Sports and Music Equipment	$1,108,692	$430	2,578	$462	2,400
Reading/Education	$854,779	$300	2,849	$360	2,374
Automotive Equipment	$569,469	$188	3,029	$241	2,363
GAFO SUBTOTAL	$15,367,634		46,424		42,353
RESIDENT-GENERATED RETAIL DEMAND:	$299,422,678		753,300		552,809

Source: U.S. Census Bureau, Claritas, Inc., Streetsense

TABLE 18. FOWLER/USF SUBAREA - EMPLOYEE-GENERATED RETAIL DEMAND (HEALTHCARE) - PRIMARY TRADE AREA - 2030

Category	Capture Rate	Total Captured Expenditures	Retail Sales per SF (Low)	Total Demand- Low Productivity (SF)	Retail Sales per SF (High)	Total Demand- High Productivity (SF)
NG&S SUBTOTAL	20.00%	$9,334,479	$305	30,645	$431	21,648
F&B SUBTOTAL	30.00%	$9,301,987	$425	21,887	$625	14,883
GAFO SUBTOTAL	5.00%	$1,976,208	$321	6,164	$362	5,465
EMPLOYEE-GENERATED RETAIL DEMAND:		$20,612,673		58,696		41,996

Source: U.S. Census Bureau, Claritas, Inc., Streetsense

TABLE 19. FOWLER/USF SUBAREA - EMPLOYEE-GENERATED RETAIL DEMAND (EDUCATION) - PRIMARY TRADE AREA - 2030

Category	Capture Rate	Total Captured Expenditures	Retail Sales per SF (Low)	Total Demand- Low Productivity (SF)	Retail Sales per SF (High)	Total Demand- High Productivity (SF)
NG&S SUBTOTAL	20.00%	$5,385,225	$305	17,680	$431	12,489
F&B SUBTOTAL	10.00%	$1,788,827	$425	4,209	$625	2,862
GAFO SUBTOTAL	5.00%	$1,140,109	$321	3,556	$362	3,153
EMPLOYEE-GENERATED RETAIL DEMAND:		$8,314,161		25,445		18,504

Source: U.S. Census Bureau, Claritas, Inc., Streetsense

TABLE 20. FOWLER/USF SUBAREA - EMPLOYEE-GENERATED RETAIL DEMAND (RETAIL/OTHER) - PRIMARY TRADE AREA - 2030

Category	Capture Rate	Total Captured Expenditures	Retail Sales per SF (Low)	Total Demand- Low Productivity (SF)	Retail Sales per SF (High)	Total Demand- High Productivity (SF)
NG&S SUBTOTAL	40.00%	$34,484,453	$305	113,212	$431	79,973
F&B SUBTOTAL	35.00%	$20,045,911	$425	47,167	$625	32,073
GAFO SUBTOTAL	10.00%	$7,300,724	$321	22,772	$362	20,190
EMPLOYEE-GENERATED RETAIL DEMAND:		$61,831,088		183,151		132,237

Source: U.S. Census Bureau, Claritas, Inc., Streetsense

TABLE 21. FOWLER/USF SUBAREA - CUMULATIVE RETAIL DEMAND - 2030

Category		Total Captured Expenditures	Total Demand- Low Productivity (SF)	Total Demand- High Productivity (SF)
NG&S SUBTOTAL		$233,918,334	639,725	470,563
F&B SUBTOTAL		$130,477,590	301,951	203,821
GAFO SUBTOTAL		$25,784,675	78,916	71,161
CUMULATIVE RETAIL DEMAND:		$390,180,600	1,020,592	745,546

Source: U.S. Census Bureau, Claritas, Inc., Streetsense

Florida/Nebraska Subarea Technical Appendix

TABLE 22. FLORIDA/NEBRASKA SUBAREA - RESIDENT-GENERATED RETAIL DEMAND - PRIMARY TRADE AREA - 2020

Category	Capture Rate	Total Captured Expenditures	Retail Sales per SF (Low)	Total Demand- Low Productivity (SF)	Retail Sales per SF (High)	Total Demand- High Productivity (SF)
Food At Home	15.00%	$24,859,548	$398	62,461	$517	48,084
Alcohol at Home	15.00%	$1,377,527	$254	5,423	$310	4,444
Personal/Household Care Goods/Services	12.00%	$5,407,592	$526	10,281	$791	6,836
Pet Food & Services	10.00%	$905,537	$162	5,590	$273	3,317
Apparel Services	15.00%	$589,453	$183	3,221	$265	2,224
NG&S SUBTOTAL		**$33,139,657**		**86,976**		**64,906**
Full-Service	20.00%	$10,276,988	$500	20,554	$750	13,703
Fast Food	20.00%	$11,293,582	$400	28,234	$600	18,823
Alcohol Away from Home	20.00%	$1,289,963	$500	2,580	$750	1,720
Snacks & Non-Alcoholic Beverages	20.00%	$1,836,702	$300	6,122	$400	4,592
F&B SUBTOTAL		**$24,697,235**		**57,490**		**38,837**
Home Furnishings	2.00%	$1,257,500	$310	4,056	$325	3,869
Apparel	2.00%	$1,177,198	$375	3,139	$420	2,803
Electronics, Sports and Music Equipment	2.00%	$224,676	$430	523	$462	486
Reading/Education	2.00%	$146,936	$300	490	$360	408
Automotive Equipment	2.00%	$120,453	$188	641	$241	500
GAFO SUBTOTAL		**$2,926,763**		**8,849**		**8,066**
RESIDENT-GENERATED RETAIL DEMAND:		**$60,763,655**		**153,315**		**111,809**

Source: U.S. Census Bureau, Claritas, Inc., Streetsense

TABLE 23. FLORIDA/NEBRASKA SUBAREA - RESIDENT-GENERATED RETAIL DEMAND - SECONDARY TRADE AREA - 2020

Category	Capture Rate	Total Captured Expenditures	Retail Sales per SF (Low)	Total Demand- Low Productivity (SF)	Retail Sales per SF (High)	Total Demand- High Productivity (SF)
Food At Home	7.00%	$10,593,976	$398	26,618	$517	20,491
Alcohol at Home	7.00%	$561,588	$254	2,211	$310	1,812
Personal/Household Care Goods/Services	7.00%	$2,903,889	$526	5,521	$791	3,671
Pet Food & Services	7.00%	$536,190	$162	3,310	$273	1,964
Apparel Services	7.00%	$268,095	$183	1,465	$265	1,012
NG&S SUBTOTAL		$14,863,737		39,125		28,950
Full-Service	10.00%	$4,551,564	$500	9,103	$750	6,069
Fast Food	10.00%	$5,232,887	$400	13,082	$600	8,721
Alcohol Away from Home	10.00%	$552,316	$500	1,105	$750	736
Snacks & Non-Alcoholic Beverages	10.00%	$842,584	$300	2,809	$400	2,106
F&B SUBTOTAL		$11,179,350		26,099		17,633
Home Furnishings	2.00%	$1,096,568	$310	3,537	$325	3,374
Apparel	1.00%	$531,755	$375	1,418	$420	1,266
Electronics, Sports and Music Equipment	1.00%	$98,772	$430	230	$462	214
Reading/Education	2.00%	$137,877	$300	460	$360	383
Automotive Equipment	2.00%	$109,657	$188	583	$241	455
GAFO SUBTOTAL		$1,974,629		6,228		5,692
RESIDENT-GENERATED RETAIL DEMAND:		$28,017,716		71,451		52,275

Source: U.S. Census Bureau, Claritas, Inc., Streetsense

TABLE 24. FLORIDA/NEBRASKA SUBAREA - RESIDENT-GENERATED RETAIL DEMAND - CUMULATIVE - 2020

Category	Total Captured Expenditures	Retail Sales per SF (Low)	Total Demand- Low Productivity (SF)	Retail Sales per SF (High)	Total Demand- High Productivity (SF)
Food At Home	$35,453,524	$398	89,079	$517	68,575
Alcohol at Home	$1,939,114	$254	7,634	$310	6,255
Personal/Household Care Goods/Services	$8,311,482	$526	15,801	$791	10,508
Pet Food & Services	$1,441,726	$162	8,900	$273	5,281
Apparel Services	$857,548	$183	4,686	$265	3,236
NG&S SUBTOTAL	$48,003,394		126,100		93,855
Full-Service	$14,828,552	$500	29,657	$750	19,771
Fast Food	$16,526,469	$400	41,316	$600	27,544
Alcohol Away from Home	$1,842,278	$500	3,685	$750	2,456
Snacks & Non-Alcoholic Beverages	$2,679,286	$300	8,931	$400	6,698
F&B SUBTOTAL	$35,876,584		83,589		56,470
Home Furnishings	$2,354,068	$310	7,594	$325	7,243
Apparel	$1,708,953	$375	4,557	$420	4,069
Electronics, Sports and Music Equipment	$323,447	$430	752	$462	700
Reading/Education	$284,813	$300	949	$360	791
Automotive Equipment	$230,110	$188	1,224	$241	955
GAFO SUBTOTAL	$4,901,392		15,077		13,758
RESIDENT-GENERATED RETAIL DEMAND:	$88,781,371		224,766		164,084

Source: U.S. Census Bureau, Claritas, Inc., Streetsense

TABLE 25. FLORIDA/NEBRASKA SUBAREA - EMPLOYEE-GENERATED RETAIL DEMAND - PRIMARY TRADE AREA - 2020

Category	Capture Rate	Total Captured Expenditures	Retail Sales per SF (Low)	Total Demand- Low Productivity (SF)	Retail Sales per SF (High)	Total Demand- High Productivity (SF)
NG&S SUBTOTAL	5.00%	$3,605,924	$305	11,838	$431	8,363
F&B SUBTOTAL	10.00%	$4,791,163	$425	11,273	$625	7,666
GAFO SUBTOTAL	3.00%	$1,832,190	$321	5,715	$362	5,067
EMPLOYEE-GENERATED RETAIL DEMAND:		$10,229,277		28,826		21,095

Source: U.S. Census Bureau, Claritas, Inc., Streetsense

TABLE 26. FLORIDA/NEBRASKA SUBAREA - CUMULATIVE RETAIL DEMAND - 2020

Category		Total Captured Expenditures	Total Demand- Low Productivity (SF)	Total Demand- High Productivity (SF)
NG&S SUBTOTAL		$51,609,318	137,939	102,218
F&B SUBTOTAL		$40,667,748	94,862	64,136
GAFO SUBTOTAL		$6,733,582	20,791	18,825
CUMULATIVE RETAIL DEMAND:		$99,010,647	253,592	185,179

Source: U.S. Census Bureau, Claritas, Inc., Streetsense

TABLE 27. FLORIDA/NEBRASKA SUBAREA - RESIDENT-GENERATED RETAIL DEMAND - PRIMARY TRADE AREA - 2025

Category	Capture Rate	Total Captured Expenditures	Retail Sales per SF (Low)	Total Demand- Low Productivity (SF)	Retail Sales per SF (High)	Total Demand- High Productivity (SF)
Food At Home	15.00%	$26,323,775	$398	66,140	$517	50,916
Alcohol at Home	15.00%	$1,458,663	$254	5,743	$310	4,705
Personal/Household Care Goods/Services	12.00%	$5,726,100	$526	10,886	$791	7,239
Pet Food & Services	10.00%	$958,873	$162	5,919	$273	3,512
Apparel Services	15.00%	$624,172	$183	3,411	$265	2,355
NG&S SUBTOTAL		$35,091,583		92,099		68,729
Full-Service	20.00%	$10,882,303	$500	21,765	$750	14,510
Fast Food	20.00%	$11,958,774	$400	29,897	$600	19,931
Alcohol Away from Home	20.00%	$1,365,942	$500	2,732	$750	1,821
Snacks & Non-Alcoholic Beverages	20.00%	$1,944,884	$300	6,483	$400	4,862
F&B SUBTOTAL		$26,151,902		60,876		41,124
Home Furnishings	2.00%	$1,331,567	$310	4,295	$325	4,097
Apparel	2.00%	$1,246,535	$375	3,324	$420	2,968
Electronics, Sports and Music Equipment	2.00%	$237,909	$430	553	$462	515
Reading/Education	2.00%	$155,591	$300	519	$360	432
Automotive Equipment	2.00%	$127,548	$188	678	$241	529
GAFO SUBTOTAL		$3,099,150		9,370		8,541
RESIDENT-GENERATED RETAIL DEMAND:		$64,342,634		162,345		118,394

Source: U.S. Census Bureau, Claritas, Inc., Streetsense

TABLE 28. FLORIDA/NEBRASKA SUBAREA - RESIDENT-GENERATED RETAIL DEMAND - SECONDARY TRADE AREA - 2025

Category	Capture Rate	Total Captured Expenditures	Retail Sales per SF (Low)	Total Demand- Low Productivity (SF)	Retail Sales per SF (High)	Total Demand- High Productivity (SF)
Food At Home	7.00%	$11,283,644	$398	28,351	$517	21,825
Alcohol at Home	7.00%	$598,147	$254	2,355	$310	1,930
Personal/Household Care Goods/Services	7.00%	$3,092,933	$526	5,880	$791	3,910
Pet Food & Services	7.00%	$571,095	$162	3,525	$273	2,092
Apparel Services	7.00%	$285,548	$183	1,560	$265	1,078
NG&S SUBTOTAL		$15,831,367		41,672		30,834
Full-Service	10.00%	$4,847,870	$500	9,696	$750	6,464
Fast Food	10.00%	$5,573,548	$400	13,934	$600	9,289
Alcohol Away from Home	10.00%	$588,271	$500	1,177	$750	784
Snacks & Non-Alcoholic Beverages	10.00%	$897,436	$300	2,991	$400	2,244
F&B SUBTOTAL		$11,907,125		27,798		18,781
Home Furnishings	2.00%	$1,167,955	$310	3,768	$325	3,594
Apparel	1.00%	$566,372	$375	1,510	$420	1,349
Electronics, Sports and Music Equipment	1.00%	$105,202	$430	245	$462	228
Reading/Education	2.00%	$146,853	$300	490	$360	408
Automotive Equipment	2.00%	$116,795	$188	621	$241	485
GAFO SUBTOTAL		$2,103,177		6,633		6,062
RESIDENT-GENERATED RETAIL DEMAND:		$29,841,669		76,102		55,678

Source: U.S. Census Bureau, Claritas, Inc., Streetsense

TABLE 29. FLORIDA/NEBRASKA SUBAREA - RESIDENT-GENERATED RETAIL DEMAND - CUMULATIVE - 2025

Category	Total Captured Expenditures	Retail Sales per SF (Low)	Total Demand- Low Productivity (SF)	Retail Sales per SF (High)	Total Demand- High Productivity (SF)
Food At Home	$37,607,419	$398	94,491	$517	72,742
Alcohol at Home	$2,056,810	$254	8,098	$310	6,635
Personal/Household Care Goods/Services	$8,819,032	$526	16,766	$791	11,149
Pet Food & Services	$1,529,968	$162	9,444	$273	5,604
Apparel Services	$909,720	$183	4,971	$265	3,433
NG&S SUBTOTAL	$50,922,949		133,770		99,563
Full-Service	$15,730,173	$500	31,460	$750	20,974
Fast Food	$17,532,321	$400	43,831	$600	29,221
Alcohol Away from Home	$1,954,213	$500	3,908	$750	2,606
Snacks & Non-Alcoholic Beverages	$2,842,319	$300	9,474	$400	7,106
F&B SUBTOTAL	$38,059,027		88,674		59,906
Home Furnishings	$2,499,521	$310	8,063	$325	7,691
Apparel	$1,812,907	$375	4,834	$420	4,316
Electronics, Sports and Music Equipment	$343,111	$430	798	$462	743
Reading/Education	$302,444	$300	1,008	$360	840
Automotive Equipment	$244,344	$188	1,300	$241	1,014
GAFO SUBTOTAL	$5,202,327		16,003		14,604
RESIDENT-GENERATED RETAIL DEMAND:	$94,184,303		238,447		174,072

Source: U.S. Census Bureau, Claritas, Inc., Streetsense

TABLE 30. FLORIDA/NEBRASKA SUBAREA - EMPLOYEE-GENERATED RETAIL DEMAND - PRIMARY TRADE AREA - 2025

Category	Capture Rate	Total Captured Expenditures	Retail Sales per SF (Low)	Total Demand- Low Productivity (SF)	Retail Sales per SF (High)	Total Demand- High Productivity (SF)
NG&S SUBTOTAL	5.00%	$3,780,811	$305	12,412	$431	8,768
F&B SUBTOTAL	10.00%	$5,023,535	$425	11,820	$625	8,038
GAFO SUBTOTAL	3.00%	$1,921,051	$321	5,992	$362	5,313
EMPLOYEE-GENERATED RETAIL DEMAND:		$10,725,397		30,225		22,118

Source: U.S. Census Bureau, Claritas, Inc., Streetsense

TABLE 31. FLORIDA/NEBRASKA SUBAREA - CUMULATIVE RETAIL DEMAND - 2025

Category		Total Captured Expenditures	Total Demand- Low Productivity (SF)	Total Demand- High Productivity (SF)
NG&S SUBTOTAL		$54,703,761	146,183	108,331
F&B SUBTOTAL		$43,082,562	100,494	67,943
GAFO SUBTOTAL		$7,123,377	21,995	19,917
CUMULATIVE RETAIL DEMAND:		$104,909,700	268,672	196,191

Source: U.S. Census Bureau, Claritas, Inc., Streetsense

TABLE 32. FLORIDA/NEBRASKA SUBAREA - RESIDENT-GENERATED RETAIL DEMAND - PRIMARY TRADE AREA - 2030

Category	Capture Rate	Total Captured Expenditures	Retail Sales per SF (Low)	Total Demand- Low Productivity (SF)	Retail Sales per SF (High)	Total Demand- High Productivity (SF)
Food At Home	15.00%	$27,874,246	$398	70,036	$517	53,915
Alcohol at Home	15.00%	$1,544,578	$254	6,081	$310	4,983
Personal/Household Care Goods/Services	12.00%	$6,063,367	$526	11,527	$791	7,665
Pet Food & Services	10.00%	$1,015,351	$162	6,268	$273	3,719
Apparel Services	15.00%	$660,936	$183	3,612	$265	2,494
NG&S SUBTOTAL		$37,158,477		97,523		72,777
Full-Service	20.00%	$11,523,271	$500	23,047	$750	15,364
Fast Food	20.00%	$12,663,145	$400	31,658	$600	21,105
Alcohol Away from Home	20.00%	$1,446,396	$500	2,893	$750	1,929
Snacks & Non-Alcoholic Beverages	20.00%	$2,059,437	$300	6,865	$400	5,149
F&B SUBTOTAL		$27,692,249		64,462		43,547
Home Furnishings	2.00%	$1,409,996	$310	4,548	$325	4,338
Apparel	2.00%	$1,319,956	$375	3,520	$420	3,143
Electronics, Sports and Music Equipment	2.00%	$251,922	$430	586	$462	545
Reading/Education	2.00%	$164,755	$300	549	$360	458
Automotive Equipment	2.00%	$135,061	$188	718	$241	560
GAFO SUBTOTAL		$3,281,690		9,922		9,045
RESIDENT-GENERATED RETAIL DEMAND:		$68,132,415		171,907		125,368

Source: U.S. Census Bureau, Claritas, Inc., Streetsense

TABLE 33. FLORIDA/NEBRASKA SUBAREA - RESIDENT-GENERATED RETAIL DEMAND - SECONDARY TRADE AREA - 2030

Category	Capture Rate	Total Captured Expenditures	Retail Sales per SF (Low)	Total Demand- Low Productivity (SF)	Retail Sales per SF (High)	Total Demand- High Productivity (SF)
Food At Home	7.00%	$12,018,209	$398	30,197	$517	23,246
Alcohol at Home	7.00%	$637,087	$254	2,508	$310	2,055
Personal/Household Care Goods/Services	7.00%	$3,294,283	$526	6,263	$791	4,165
Pet Food & Services	7.00%	$608,274	$162	3,755	$273	2,228
Apparel Services	7.00%	$304,137	$183	1,662	$265	1,148
NG&S SUBTOTAL		$16,861,989		44,384		32,842
Full-Service	10.00%	$5,163,467	$500	10,327	$750	6,885
Fast Food	10.00%	$5,936,386	$400	14,841	$600	9,894
Alcohol Away from Home	10.00%	$626,568	$500	1,253	$750	835
Snacks & Non-Alcoholic Beverages	10.00%	$955,859	$300	3,186	$400	2,390
F&B SUBTOTAL		$12,682,279		29,607		20,004
Home Furnishings	2.00%	$1,243,988	$310	4,013	$325	3,828
Apparel	1.00%	$603,243	$375	1,609	$420	1,436
Electronics, Sports and Music Equipment	1.00%	$112,050	$430	261	$462	243
Reading/Education	2.00%	$156,413	$300	521	$360	434
Automotive Equipment	2.00%	$124,399	$188	662	$241	516
GAFO SUBTOTAL		$2,240,094		7,065		6,457
RESIDENT-GENERATED RETAIL DEMAND:		$31,784,361		81,057		59,302

Source: U.S. Census Bureau, Claritas, Inc., Streetsense

TABLE 34. FLORIDA/NEBRASKA SUBAREA - RESIDENT-GENERATED RETAIL DEMAND - CUMULATIVE - 2030

Category	Total Captured Expenditures	Retail Sales per SF (Low)	Total Demand- Low Productivity (SF)	Retail Sales per SF (High)	Total Demand- High Productivity (SF)
Food At Home	$39,892,454	$398	100,232	$517	77,161
Alcohol at Home	$2,181,665	$254	8,589	$310	7,038
Personal/Household Care Goods/Services	$9,357,649	$526	17,790	$791	11,830
Pet Food & Services	$1,623,624	$162	10,022	$273	5,947
Apparel Services	$965,073	$183	5,274	$265	3,642
NG&S SUBTOTAL	**$54,020,466**		**141,908**		**105,618**
Full-Service	$16,686,737	$500	33,373	$750	22,249
Fast Food	$18,599,531	$400	46,499	$600	30,999
Alcohol Away from Home	$2,072,963	$500	4,146	$750	2,764
Snacks & Non-Alcoholic Beverages	$3,015,296	$300	10,051	$400	7,538
F&B SUBTOTAL	**$40,374,528**		**94,069**		**63,550**
Home Furnishings	$2,653,985	$310	8,561	$325	8,166
Apparel	$1,923,199	$375	5,129	$420	4,579
Electronics, Sports and Music Equipment	$363,972	$430	846	$462	788
Reading/Education	$321,168	$300	1,071	$360	892
Automotive Equipment	$259,460	$188	1,380	$241	1,077
GAFO SUBTOTAL	**$5,521,783**		**16,987**		**15,502**
RESIDENT-GENERATED RETAIL DEMAND:	**$99,916,777**		**252,964**		**184,670**

Source: U.S. Census Bureau, Claritas, Inc., Streetsense

TABLE 35. FLORIDA/NEBRASKA SUBAREA - EMPLOYEE-GENERATED RETAIL DEMAND - PRIMARY TRADE AREA - 2030

Category	Capture Rate	Total Captured Expenditures	Retail Sales per SF (Low)	Total Demand- Low Productivity (SF)	Retail Sales per SF (High)	Total Demand- High Productivity (SF)
NG&S SUBTOTAL	5.00%	$3,892,156	$305	12,778	$431	9,026
F&B SUBTOTAL	10.00%	$5,171,478	$425	12,168	$625	8,274
GAFO SUBTOTAL	3.00%	$1,977,626	$321	6,169	$362	5,469
EMPLOYEE-GENERATED RETAIL DEMAND:		$11,041,260		31,115		22,770

Source: U.S. Census Bureau, Claritas, Inc., Streetsense

TABLE 36. FLORIDA/NEBRASKA SUBAREA - CUMULATIVE RETAIL DEMAND - 2030

Category		Total Captured Expenditures	Total Demand- Low Productivity (SF)	Total Demand- High Productivity (SF)
NG&S SUBTOTAL		$57,912,622	154,686	114,645
F&B SUBTOTAL		$45,546,006	106,237	71,825
GAFO SUBTOTAL		$7,499,409	23,155	20,971
CUMULATIVE RETAIL DEMAND:		$110,958,037	284,078	207,440

Source: U.S. Census Bureau, Claritas, Inc., Streetsense

Downtown Subarea
Technical Appendix

TABLE 37. DOWNTOWN SUBAREA - RESIDENT-GENERATED RETAIL DEMAND - PRIMARY TRADE AREA - 2020

Category	Capture Rate	Total Captured Expenditures	Retail Sales per SF (Low)	Total Demand- Low Productivity (SF)	Retail Sales per SF (High)	Total Demand- High Productivity (SF)
Food At Home	30.00%	$14,719,391	$398	36,983	$517	28,471
Alcohol at Home	30.00%	$1,303,324	$254	5,131	$310	4,204
Personal/Household Care Goods/Services	25.00%	$3,652,606	$526	6,944	$791	4,618
Pet Food & Services	25.00%	$813,682	$162	5,023	$273	2,981
Apparel Services	25.00%	$537,675	$183	2,938	$265	2,029
NG&S SUBTOTAL		**$21,026,677**		**57,020**		**42,302**
Full-Service	28.00%	$6,399,336	$500	12,799	$750	8,532
Fast Food	30.00%	$6,404,785	$400	16,012	$600	10,675
Alcohol Away from Home	30.00%	$1,243,105	$500	2,486	$750	1,657
Snacks & Non-Alcoholic Beverages	28.00%	$1,095,997	$300	3,653	$400	2,740
F&B SUBTOTAL		**$15,143,222**		**34,950**		**23,605**
Home Furnishings	6.00%	$1,466,777	$310	4,732	$325	4,513
Apparel	6.00%	$1,305,045	$375	3,480	$420	3,107
Electronics, Sports and Music Equipment	6.00%	$262,385	$430	610	$462	568
Reading/Education	6.00%	$220,232	$300	734	$360	612
Automotive Equipment	6.00%	$109,256	$188	581	$241	453
GAFO SUBTOTAL		**$3,363,695**		**10,137**		**9,253**
RESIDENT-GENERATED RETAIL DEMAND:		**$39,533,594**		**102,107**		**75,160**

Source: U.S. Census Bureau, Claritas, Inc., Streetsense

TABLE 38. DOWNTOWN SUBAREA - RESIDENT-GENERATED RETAIL DEMAND - SECONDARY TRADE AREA - 2020

Category	Capture Rate	Total Captured Expenditures	Retail Sales per SF (Low)	Total Demand- Low Productivity (SF)	Retail Sales per SF (High)	Total Demand- High Productivity (SF)
Food At Home	2.00%	$5,389,970	$398	13,543	$517	10,425
Alcohol at Home	2.00%	$404,741	$254	1,593	$310	1,306
Personal/Household Care Goods/Services	3.00%	$2,191,526	$526	4,166	$791	2,771
Pet Food & Services	2.00%	$341,123	$162	2,106	$273	1,250
Apparel Services	2.00%	$166,723	$183	911	$265	629
NG&S SUBTOTAL		$8,494,084		22,319		16,380
Full-Service	20.00%	$21,849,451	$500	43,699	$750	29,133
Fast Food	15.00%	$14,618,402	$400	36,546	$600	24,364
Alcohol Away from Home	25.00%	$4,072,093	$500	8,144	$750	5,429
Snacks & Non-Alcoholic Beverages	15.00%	$2,607,785	$300	8,693	$400	6,519
F&B SUBTOTAL		$43,147,730		97,082		65,446
Home Furnishings	1.00%	$1,272,906	$310	4,106	$325	3,917
Apparel	2.00%	$2,194,817	$375	5,853	$420	5,226
Electronics, Sports and Music Equipment	2.00%	$379,514	$430	883	$462	821
Reading/Education	2.00%	$296,152	$300	987	$360	823
Automotive Equipment	1.00%	$94,878	$188	505	$241	394
GAFO SUBTOTAL		$4,238,267		12,333		11,180
RESIDENT-GENERATED RETAIL DEMAND:		$55,880,081		131,734		93,006

Source: U.S. Census Bureau, Claritas, Inc., Streetsense

TABLE 39. DOWNTOWN SUBAREA - RESIDENT-GENERATED RETAIL DEMAND - TERTIARY TRADE AREA - 2020

Category	Capture Rate	Total Captured Expenditures	Retail Sales per SF (Low)	Total Demand- Low Productivity (SF)	Retail Sales per SF (High)	Total Demand- High Productivity (SF)
Food At Home	0.05%	$818,099.50	$398	2,056	$517	1,582
Alcohol at Home	0.05%	$53,476.69	$254	211	$310	173
Personal/Household Care Goods/Services	0.05%	$221,975.16	$526	422	$791	281
Pet Food & Services	0.05%	$48,222.84	$162	298	$273	177
Apparel Services	0.05%	$21,578.31	$183	118	$265	81
NG&S SUBTOTAL		$1,163,353		3,104		2,294
Full-Service	2.00%	$11,993,789.00	$500	23,988	$750	15,992
Fast Food	1.00%	$5,940,603.25	$400	14,852	$600	9,901
Alcohol Away from Home	2.00%	$1,606,177.00	$500	3,212	$750	2,142
Snacks & Non-Alcoholic Beverages	1.00%	$1,016,995.25	$300	3,390	$400	2,542
F&B SUBTOTAL		$20,557,565		45,441		30,577
Home Furnishings	0.25%	$1,773,174.38	$310	5,720	$325	5,456
Apparel	0.25%	$1,598,671.50	$375	4,263	$420	3,806
Electronics, Sports and Music Equipment	0.25%	$283,332.63	$430	659	$462	613
Reading/Education	0.25%	$207,339.44	$300	691	$360	576
Automotive Equipment	0.25%	$149,171.81	$188	793	$241	619
GAFO SUBTOTAL		$4,011,690		12,127		11,070
RESIDENT-GENERATED RETAIL DEMAND:		$25,732,607		60,672		43,941

Source: U.S. Census Bureau, Claritas, Inc., Streetsense

TABLE 40. DOWNTOWN SUBAREA - RESIDENT-GENERATED RETAIL DEMAND - CUMULATIVE - 2020

Category	Total Captured Expenditures	Retail Sales per SF (Low)	Total Demand- Low Productivity (SF)	Retail Sales per SF (High)	Total Demand- High Productivity (SF)
Food At Home	$20,927,460	$398	52,582	$517	40,479
Alcohol at Home	$1,761,542	$254	6,935	$310	5,682
Personal/Household Care Goods/Services	$6,066,107	$526	11,533	$791	7,669
Pet Food & Services	$1,203,028	$162	7,426	$273	4,407
Apparel Services	$725,976	$183	3,967	$265	2,740
NG&S SUBTOTAL	$30,684,113		82,442		60,976
Full-Service	$40,242,576	$500	80,485	$750	53,657
Fast Food	$26,963,790	$400	67,409	$600	44,940
Alcohol Away from Home	$6,921,374	$500	13,843	$750	9,228
Snacks & Non-Alcoholic Beverages	$4,720,777	$300	15,736	$400	11,802
F&B SUBTOTAL	$78,848,517		177,473		119,627
Home Furnishings	$4,512,858	$310	14,558	$325	13,886
Apparel	$5,098,533	$375	13,596	$420	12,139
Electronics, Sports and Music Equipment	$925,232	$430	2,152	$462	2,003
Reading/Education	$723,723	$300	2,412	$360	2,010
Automotive Equipment	$353,306	$188	1,879	$241	1,466
GAFO SUBTOTAL	$11,613,652		34,597		31,504
RESIDENT-GENERATED RETAIL DEMAND:	$121,146,282		294,513		212,107

Source: U.S. Census Bureau, Claritas, Inc., Streetsense

TABLE 41. DOWNTOWN SUBAREA - EMPLOYEE-GENERATED RETAIL DEMAND - PRIMARY TRADE AREA - 2020

Category	Capture Rate	Total Captured Expenditures	Retail Sales per SF (Low)	Total Demand- Low Productivity (SF)	Retail Sales per SF (High)	Total Demand- High Productivity (SF)
NG&S SUBTOTAL	10.00%	$6,684,363	$305	21,945	$431	15,502
F&B SUBTOTAL	25.00%	$11,101,826	$425	26,122	$625	17,763
GAFO SUBTOTAL	3.00%	$1,698,181	$321	5,297	$362	4,696
EMPLOYEE-GENERATED RETAIL DEMAND:		$19,484,369		53,364		37,961

Source: U.S. Census Bureau, Claritas, Inc., Streetsense

TABLE 42. DOWNTOWN SUBAREA - VISITOR-GENERATED RETAIL DEMAND (HOTEL) - PRIMARY TRADE AREA - 2020

Category	Capture Rate	Total Captured Expenditures	Retail Sales per SF (Low)	Total Demand- Low Productivity (SF)	Retail Sales per SF (High)	Total Demand- High Productivity (SF)
NG&S SUBTOTAL	20.00%	$5,599,534	$305	18,383	$431	12,986
F&B SUBTOTAL	30.00%	$42,372,084	$425	99,699	$625	67,795
GAFO SUBTOTAL	5.00%	$2,099,825	$321	6,550	$362	5,807
VISITOR-GENERATED RETAIL DEMAND:		$50,071,443		124,632		86,588

Source: U.S. Census Bureau, Claritas, Inc., Streetsense

TABLE 43. DOWNTOWN SUBAREA - CUMULATIVE RETAIL DEMAND - 2020

Category		Total Captured Expenditures	Total Demand- Low Productivity (SF)	Total Demand- High Productivity (SF)
NG&S SUBTOTAL		$42,968,010	122,770	89,464
F&B SUBTOTAL		$132,322,427	303,294	205,185
GAFO SUBTOTAL		$15,411,657	46,444	42,007
CUMULATIVE RETAIL DEMAND:		$190,702,094	472,508	336,656

Source: U.S. Census Bureau, Claritas, Inc., Streetsense

TABLE 44. DOWNTOWN SUBAREA - RESIDENT-GENERATED RETAIL DEMAND - PRIMARY TRADE AREA - 2025

Category	Capture Rate	Total Captured Expenditures	Retail Sales per SF (Low)	Total Demand- Low Productivity (SF)	Retail Sales per SF (High)	Total Demand- High Productivity (SF)
Food At Home	30.00%	$17,326,955	$398	43,535	$517	33,514
Alcohol at Home	30.00%	$1,534,210	$254	6,040	$310	4,949
Personal/Household Care Goods/Services	25.00%	$4,299,671	$526	8,174	$791	5,436
Pet Food & Services	25.00%	$957,827	$162	5,913	$273	3,509
Apparel Services	25.00%	$632,925	$183	3,459	$265	2,388
NG&S SUBTOTAL		$24,751,587		67,121		49,796
Full-Service	28.00%	$7,532,989	$500	15,066	$750	10,044
Fast Food	30.00%	$7,539,403	$400	18,849	$600	12,566
Alcohol Away from Home	30.00%	$1,463,323	$500	2,927	$750	1,951
Snacks & Non-Alcoholic Beverages	28.00%	$1,290,154	$300	4,301	$400	3,225
F&B SUBTOTAL		$17,825,868		41,142		27,786
Home Furnishings	6.00%	$1,726,619	$310	5,570	$325	5,313
Apparel	6.00%	$1,536,236	$375	4,097	$420	3,658
Electronics, Sports and Music Equipment	6.00%	$308,867	$430	718	$462	669
Reading/Education	6.00%	$259,246	$300	864	$360	720
Automotive Equipment	6.00%	$128,610	$188	684	$241	534
GAFO SUBTOTAL		$3,959,579		11,933		10,893
RESIDENT-GENERATED RETAIL DEMAND:		$46,537,034		120,195		88,475

Source: U.S. Census Bureau, Claritas, Inc., Streetsense

TABLE 45. DOWNTOWN SUBAREA - RESIDENT-GENERATED RETAIL DEMAND - SECONDARY TRADE AREA - 2025

Category	Capture Rate	Total Captured Expenditures	Retail Sales per SF (Low)	Total Demand- Low Productivity (SF)	Retail Sales per SF (High)	Total Demand- High Productivity (SF)
Food At Home	2.00%	$5,718,219	$398	14,367	$517	11,060
Alcohol at Home	2.00%	$429,390	$254	1,691	$310	1,385
Personal/Household Care Goods/Services	3.00%	$2,324,990	$526	4,420	$791	2,939
Pet Food & Services	2.00%	$361,898	$162	2,234	$273	1,326
Apparel Services	2.00%	$176,876	$183	967	$265	667
NG&S SUBTOTAL		$9,011,374		23,679		17,378
Full-Service	20.00%	$23,180,083	$500	46,360	$750	30,907
Fast Food	15.00%	$15,508,662	$400	38,772	$600	25,848
Alcohol Away from Home	25.00%	$4,320,083	$500	8,640	$750	5,760
Snacks & Non-Alcoholic Beverages	15.00%	$2,766,599	$300	9,222	$400	6,916
F&B SUBTOTAL		$45,775,427		102,994		69,431
Home Furnishings	1.00%	$1,350,426	$310	4,356	$325	4,155
Apparel	2.00%	$2,328,481	$375	6,209	$420	5,544
Electronics, Sports and Music Equipment	2.00%	$402,626	$430	936	$462	871
Reading/Education	2.00%	$314,188	$300	1,047	$360	873
Automotive Equipment	1.00%	$100,656	$188	535	$241	418
GAFO SUBTOTAL		$4,496,378		13,085		11,861
RESIDENT-GENERATED RETAIL DEMAND:		$59,283,178		139,757		98,670

Source: U.S. Census Bureau, Claritas, Inc., Streetsense

TABLE 46. DOWNTOWN SUBAREA - RESIDENT-GENERATED RETAIL DEMAND - TERTIARY TRADE AREA - 2025

Category	Capture Rate	Total Captured Expenditures	Retail Sales per SF (Low)	Total Demand- Low Productivity (SF)	Retail Sales per SF (High)	Total Demand- High Productivity (SF)
Food At Home	0.05%	$874,424.16	$398	2,197	$517	1,691
Alcohol at Home	0.05%	$57,158.46	$254	225	$310	184
Personal/Household Care Goods/Services	0.05%	$237,257.75	$526	451	$791	300
Pet Food & Services	0.05%	$51,542.89	$162	318	$273	189
Apparel Services	0.05%	$23,063.94	$183	126	$265	87
NG&S SUBTOTAL		**$1,243,447**		**3,317**		**2,452**
Full-Service	2.00%	$12,819,539.52	$500	25,639	$750	17,093
Fast Food	1.00%	$6,349,602.96	$400	15,874	$600	10,583
Alcohol Away from Home	2.00%	$1,716,759.36	$500	3,434	$750	2,289
Snacks & Non-Alcoholic Beverages	1.00%	$1,087,013.52	$300	3,623	$400	2,718
F&B SUBTOTAL		**$21,972,915**		**48,570**		**32,682**
Home Furnishings	0.25%	$1,895,254.20	$310	6,114	$325	5,832
Apparel	0.25%	$1,708,737.12	$375	4,557	$420	4,068
Electronics, Sports and Music Equipment	0.25%	$302,839.56	$430	704	$462	655
Reading/Education	0.25%	$221,614.38	$300	739	$360	616
Automotive Equipment	0.25%	$159,442.02	$188	848	$241	662
GAFO SUBTOTAL		**$4,287,887**		**12,961**		**11,833**
RESIDENT-GENERATED RETAIL DEMAND:		**$27,504,250**		**64,849**		**46,966**

Source: U.S. Census Bureau, Claritas, Inc., Streetsense

TABLE 47. DOWNTOWN SUBAREA - RESIDENT-GENERATED RETAIL DEMAND - CUMULATIVE - 2025

Category	Total Captured Expenditures	Retail Sales per SF (Low)	Total Demand- Low Productivity (SF)	Retail Sales per SF (High)	Total Demand- High Productivity (SF)
Food At Home	$23,919,598	$398	60,099	$517	46,266
Alcohol at Home	$2,020,759	$254	7,956	$310	6,519
Personal/Household Care Goods/Services	$6,861,918	$526	13,045	$791	8,675
Pet Food & Services	$1,371,267	$162	8,465	$273	5,023
Apparel Services	$832,865	$183	4,551	$265	3,143
NG&S SUBTOTAL	$35,006,408		94,116		69,626
Full-Service	$43,532,611	$500	87,065	$750	58,043
Fast Food	$29,397,668	$400	73,494	$600	48,996
Alcohol Away from Home	$7,500,165	$500	15,000	$750	10,000
Snacks & Non-Alcoholic Beverages	$5,143,767	$300	17,146	$400	12,859
F&B SUBTOTAL	$85,574,211		192,706		129,899
Home Furnishings	$4,972,300	$310	16,040	$325	15,299
Apparel	$5,573,454	$375	14,863	$420	13,270
Electronics, Sports and Music Equipment	$1,014,333	$430	2,359	$462	2,196
Reading/Education	$795,048	$300	2,650	$360	2,208
Automotive Equipment	$388,709	$188	2,068	$241	1,613
GAFO SUBTOTAL	$12,743,844		37,979		34,586
RESIDENT-GENERATED RETAIL DEMAND:	$133,324,462		324,801		234,111

Source: U.S. Census Bureau, Claritas, Inc., Streetsense

TABLE 48. DOWNTOWN SUBAREA - EMPLOYEE-GENERATED RETAIL DEMAND - PRIMARY TRADE AREA - 2025

Category	Capture Rate	Total Captured Expenditures	Retail Sales per SF (Low)	Total Demand- Low Productivity (SF)	Retail Sales per SF (High)	Total Demand- High Productivity (SF)
NG&S SUBTOTAL	10.00%	$8,747,973	$305	28,720	$431	20,288
F&B SUBTOTAL	25.00%	$14,529,204	$425	34,186	$625	23,247
GAFO SUBTOTAL	3.00%	$2,222,446	$321	6,932	$362	6,146
EMPLOYEE-GENERATED RETAIL DEMAND:		$25,499,623		69,838		49,680

Source: U.S. Census Bureau, Claritas, Inc., Streetsense

TABLE 49. DOWNTOWN SUBAREA - VISITOR-GENERATED RETAIL DEMAND (HOTEL) - PRIMARY TRADE AREA - 2025

Category	Capture Rate	Total Captured Expenditures	Retail Sales per SF (Low)	Total Demand- Low Productivity (SF)	Retail Sales per SF (High)	Total Demand- High Productivity (SF)
NG&S SUBTOTAL	20.00%	$5,826,311	$305	19,128	$431	13,512
F&B SUBTOTAL	30.00%	$44,088,118	$425	103,737	$625	70,541
GAFO SUBTOTAL	5.00%	$2,184,866	$321	6,815	$362	6,042
VISITOR-GENERATED RETAIL DEMAND:		$52,099,295		129,679		90,095

Source: U.S. Census Bureau, Claritas, Inc., Streetsense

TABLE 50. DOWNTOWN SUBAREA - CUMULATIVE RETAIL DEMAND - 2025

Category		Total Captured Expenditures	Total Demand- Low Productivity (SF)	Total Demand- High Productivity (SF)
NG&S SUBTOTAL		$49,580,691	141,964	103,425
F&B SUBTOTAL		$144,191,533	330,629	223,687
GAFO SUBTOTAL		$17,151,156	51,726	46,775
CUMULATIVE RETAIL DEMAND:		$210,923,381	524,318	373,887

Source: U.S. Census Bureau, Claritas, Inc., Streetsense

TABLE 51. DOWNTOWN SUBAREA - RESIDENT-GENERATED RETAIL DEMAND - PRIMARY TRADE AREA - 2030

Category	Capture Rate	Total Captured Expenditures	Retail Sales per SF (Low)	Total Demand- Low Productivity (SF)	Retail Sales per SF (High)	Total Demand- High Productivity (SF)
Food At Home	30.00%	$18,643,056	$398	46,842	$517	36,060
Alcohol at Home	30.00%	$1,650,744	$254	6,499	$310	5,325
Personal/Household Care Goods/Services	25.00%	$4,626,260	$526	8,795	$791	5,849
Pet Food & Services	25.00%	$1,030,580	$162	6,362	$273	3,775
Apparel Services	25.00%	$681,000	$183	3,721	$265	2,570
NG&S SUBTOTAL		**$26,631,640**		**72,219**		**53,579**
Full-Service	28.00%	$8,105,171	$500	16,210	$750	10,807
Fast Food	30.00%	$8,112,072	$400	20,280	$600	13,520
Alcohol Away from Home	30.00%	$1,574,472	$500	3,149	$750	2,099
Snacks & Non-Alcoholic Beverages	28.00%	$1,388,150	$300	4,627	$400	3,470
F&B SUBTOTAL		**$19,179,866**		**44,267**		**29,897**
Home Furnishings	6.00%	$1,857,768	$310	5,993	$325	5,716
Apparel	6.00%	$1,652,923	$375	4,408	$420	3,936
Electronics, Sports and Music Equipment	6.00%	$332,328	$430	773	$462	719
Reading/Education	6.00%	$278,938	$300	930	$360	775
Automotive Equipment	6.00%	$138,379	$188	736	$241	574
GAFO SUBTOTAL		**$4,260,336**		**12,839**		**11,720**
RESIDENT-GENERATED RETAIL DEMAND:		**$50,071,842**		**129,325**		**95,195**

Source: U.S. Census Bureau, Claritas, Inc., Streetsense

TABLE 52. DOWNTOWN SUBAREA - RESIDENT-GENERATED RETAIL DEMAND - SECONDARY TRADE AREA - 2030

Category	Capture Rate	Total Captured Expenditures	Retail Sales per SF (Low)	Total Demand- Low Productivity (SF)	Retail Sales per SF (High)	Total Demand- High Productivity (SF)
Food At Home	2.00%	$6,066,459	$398	15,242	$517	11,734
Alcohol at Home	2.00%	$455,540	$254	1,793	$310	1,469
Personal/Household Care Goods/Services	3.00%	$2,466,582	$526	4,689	$791	3,118
Pet Food & Services	2.00%	$383,937	$162	2,370	$273	1,406
Apparel Services	2.00%	$187,648	$183	1,025	$265	708
NG&S SUBTOTAL		$9,560,166		25,121		18,436
Full-Service	20.00%	$24,591,750	$500	49,183	$750	32,789
Fast Food	15.00%	$16,453,140	$400	41,133	$600	27,422
Alcohol Away from Home	25.00%	$4,583,176	$500	9,166	$750	6,111
Snacks & Non-Alcoholic Beverages	15.00%	$2,935,085	$300	9,784	$400	7,338
F&B SUBTOTAL		$48,563,151		109,266		73,660
Home Furnishings	1.00%	$1,432,667	$310	4,622	$325	4,408
Apparel	2.00%	$2,470,286	$375	6,587	$420	5,882
Electronics, Sports and Music Equipment	2.00%	$427,146	$430	993	$462	925
Reading/Education	2.00%	$333,322	$300	1,111	$360	926
Automotive Equipment	1.00%	$106,786	$188	568	$241	443
GAFO SUBTOTAL		$4,770,207		13,881		12,583
RESIDENT-GENERATED RETAIL DEMAND:		$62,893,524		148,268		104,679

Source: U.S. Census Bureau, Claritas, Inc., Streetsense

TABLE 53. DOWNTOWN SUBAREA - RESIDENT-GENERATED RETAIL DEMAND - TERTIARY TRADE AREA - 2030

Category	Capture Rate	Total Captured Expenditures	Retail Sales per SF (Low)	Total Demand- Low Productivity (SF)	Retail Sales per SF (High)	Total Demand- High Productivity (SF)
Food At Home	0.05%	$1,175,226.07	$398	2,953	$517	2,273
Alcohol at Home	0.05%	$76,820.97	$254	302	$310	248
Personal/Household Care Goods/Services	0.05%	$318,874.41	$526	606	$791	403
Pet Food & Services	0.05%	$69,273.65	$162	428	$273	254
Apparel Services	0.05%	$30,997.94	$183	169	$265	117
NG&S SUBTOTAL		$1,671,193		4,459		3,295
Full-Service	2.00%	$17,229,461.11	$500	34,459	$750	22,973
Fast Food	1.00%	$8,533,866.38	$400	21,335	$600	14,223
Alcohol Away from Home	2.00%	$2,307,324.58	$500	4,615	$750	3,076
Snacks & Non-Alcoholic Beverages	1.00%	$1,460,946.17	$300	4,870	$400	3,652
F&B SUBTOTAL		$29,531,598		65,278		43,925
Home Furnishings	0.25%	$2,547,221.64	$310	8,217	$325	7,838
Apparel	0.25%	$2,296,542.69	$375	6,124	$420	5,468
Electronics, Sports and Music Equipment	0.25%	$407,016.37	$430	947	$462	881
Reading/Education	0.25%	$297,849.73	$300	993	$360	827
Automotive Equipment	0.25%	$214,290.07	$188	1,140	$241	889
GAFO SUBTOTAL		$5,762,921		17,420		15,903
RESIDENT-GENERATED RETAIL DEMAND:		$36,965,712		87,157		63,122

Source: U.S. Census Bureau, Claritas, Inc., Streetsense

TABLE 54. DOWNTOWN SUBAREA - RESIDENT-GENERATED RETAIL DEMAND - CUMULATIVE - 2030

Category	Total Captured Expenditures	Retail Sales per SF (Low)	Total Demand- Low Productivity (SF)	Retail Sales per SF (High)	Total Demand- High Productivity (SF)
Food At Home	$25,884,741	$398	65,037	$517	50,067
Alcohol at Home	$2,183,105	$254	8,595	$310	7,042
Personal/Household Care Goods/Services	$7,411,717	$526	14,091	$791	9,370
Pet Food & Services	$1,483,791	$162	9,159	$273	5,435
Apparel Services	$899,646	$183	4,916	$265	3,395
NG&S SUBTOTAL	$37,862,999		101,798		75,310
Full-Service	$49,926,382	$500	99,853	$750	66,569
Fast Food	$33,099,078	$400	82,748	$600	55,165
Alcohol Away from Home	$8,464,973	$500	16,930	$750	11,287
Snacks & Non-Alcoholic Beverages	$5,784,181	$300	19,281	$400	14,460
F&B SUBTOTAL	$97,274,614		218,811		147,481
Home Furnishings	$5,837,657	$310	18,831	$325	17,962
Apparel	$6,419,752	$375	17,119	$420	15,285
Electronics, Sports and Music Equipment	$1,166,490	$430	2,713	$462	2,525
Reading/Education	$910,109	$300	3,034	$360	2,528
Automotive Equipment	$459,456	$188	2,444	$241	1,906
GAFO SUBTOTAL	$14,793,463		44,141		40,207
RESIDENT-GENERATED RETAIL DEMAND:	$149,931,077		364,750		262,997

Source: U.S. Census Bureau, Claritas, Inc., Streetsense

TABLE 55. DOWNTOWN SUBAREA - EMPLOYEE-GENERATED RETAIL DEMAND - PRIMARY TRADE AREA - 2030

Category	Capture Rate	Total Captured Expenditures	Retail Sales per SF (Low)	Total Demand- Low Productivity (SF)	Retail Sales per SF (High)	Total Demand- High Productivity (SF)
NG&S SUBTOTAL	10.00%	$9,078,782	$305	29,806	$431	21,055
F&B SUBTOTAL	25.00%	$15,078,634	$425	35,479	$625	24,126
GAFO SUBTOTAL	3.00%	$2,306,489	$321	7,194	$362	6,379
EMPLOYEE-GENERATED RETAIL DEMAND:		$26,463,906		72,479		51,559

Source: U.S. Census Bureau, Claritas, Inc., Streetsense

TABLE 56. DOWNTOWN SUBAREA - VISITOR-GENERATED RETAIL DEMAND (HOTEL) - PRIMARY TRADE AREA - 2030

Category	Capture Rate	Total Captured Expenditures	Retail Sales per SF (Low)	Total Demand- Low Productivity (SF)	Retail Sales per SF (High)	Total Demand- High Productivity (SF)
NG&S SUBTOTAL	20.00%	$5,826,311	$305	19,128	$431	13,512
F&B SUBTOTAL	30.00%	$44,088,118	$425	103,737	$625	70,541
GAFO SUBTOTAL	5.00%	$2,184,866	$321	6,815	$362	6,042
VISITOR-GENERATED RETAIL DEMAND:		$52,099,295		129,679		90,095

Source: U.S. Census Bureau, Claritas, Inc., Streetsense

TABLE 57. DOWNTOWN SUBAREA - CUMULATIVE RETAIL DEMAND - 2030

Category		Total Captured Expenditures	Total Demand- Low Productivity (SF)	Total Demand- High Productivity (SF)
NG&S SUBTOTAL		$52,768,092	150,731	109,876
F&B SUBTOTAL		$156,441,367	358,027	242,148
GAFO SUBTOTAL		$19,284,819	58,150	52,627
CUMULATIVE RETAIL DEMAND:		$228,494,278	566,908	404,651

Source: U.S. Census Bureau, Claritas, Inc., Streetsense

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