Business District Conditions and Market Assessment

Four Corners Business District

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Summary of Business Conditions

In total, Four Corners encompasses 174,000 square feet of commercial and institutional space "under roof". This includes 68 establishments in total. Approximately 23% of the space is devoted to retail and services traditionally found in commercial districts or shopping centers (including personal services, food service and professional services). A large portion (38%) is comprised of community/institutional uses such as churches and community nonprofits.

Approximately 21% of the first floor commercial space is vacant (9 commercial units, totaling 37,000 square feet). In addition, there appears to be a large amount of underutilized property. Rents in the area appear to vary widely. A representative of Commonwealth Realty Services estimates that current commercial rents in the Business District run approximately $15 to $17 per s.f., depending on condition of the space. A representative of Four Corners Main Street noted that several tenants are paying rents well over $20 per s.f.

Compared to typical similar-size shopping centers, Four Corners contains a much higher percentage of service businesses and a much lower percentage of retailers. The Business District has a smaller portion of both convenience goods and shoppers goods. The biggest differences in the Business District is the relative lack of 1) food, 2) drugs, health and beauty, and 3) general merchandise. The District contains some of the tenant types most frequently found in neighborhood shopping centers but is missing several of the most common, including: supermarket, medical and dental, restaurant with liquor, bank, dollar store, drugstore, video rental, liquor store, coffee/tea shop and insurance.

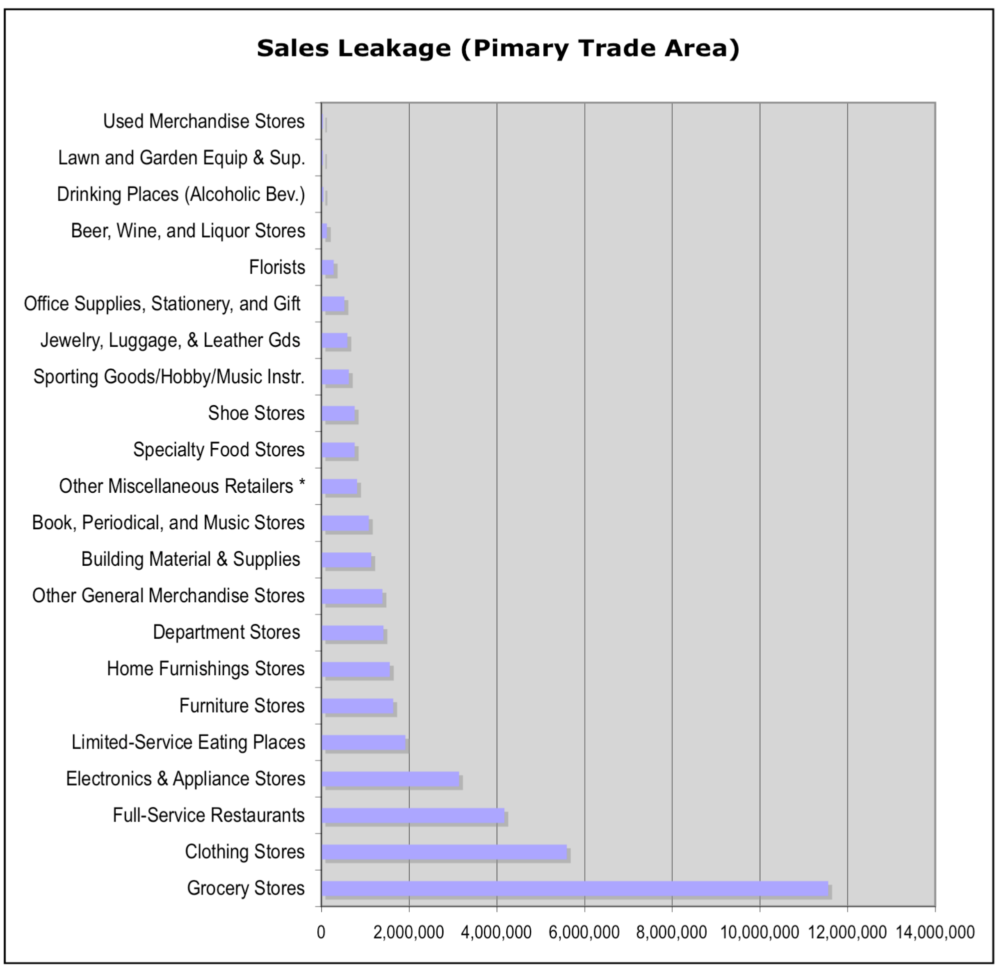
For analysis purposes, it is also useful to compare the business district being studied with other neighborhood commercial districts. Compared to three other selected Boston business districts, the categories that are under-represented in Four Corners include: general merchandise, shoes, home furnishings, home appliances, auto-related retail, gifts/specialty, liquor, drugs/health & beauty, financial/real estate/insurance and other professional services/health care.

Summary of Market Assessment/Business Development Opportunities

The major potential customer base for the Business District is the adjacent residential population. The primary trade area (where most of the sales would be expected to generate from) contains approximately 10,000 residents. The population consists primarily of moderate-income families. The estimated median household income for 2008 is $43,569, about 81% of the City-wide median. The population is predominantly African American (81%). 16% of the population is Hispanic. Compared to Boston overall, the primary trade area population, on average, is younger and much more likely to have children in the household. 51% of the households contain children compared to only 25% City-wide. More than one-third of the households do not own a vehicle, representing a market segment that is more likely to make purchases close to home. The residents of the primary trade area spend close to $48 million annually at retail stores and restaurants. They are making close to one-half of these purchases outside the primary trade area.

There are 268 businesses located in the primary trade area employing 1,589 people. The industry categories with the largest numbers of employees are: 1) Other Services, 2) Retail Trade, 3) Health Care and Social Assistance. The primary trade area (PTA) contains a below-average number of businesses per person in the following categories: Restaurants & Bars, Banks, Miscellaneous Retail, Sporting, Hobby, Book, Music, Gas Stations, Electronics/Appliance, Furnishings and Motor Vehicle & Parts.

There are several vacant properties near the Intersection of Washington Street and Bowdoin Street, therefore, for the purpose of this study, we also examined potential trade areas specifically around this intersection, including a .5 mile and 1-mile radius. These trade areas contain approximately 18,000 and 65,000 residents respectively. The characteristics of the residents in these areas are fairly similar to the residents of the primary trade area. The residents that live within 1/2 mile from the intersection spend $87 million annually at retail stores and restaurants and make approximately one-half of their purchases outside the trade area. The residents that live within a 1-mile radius spend $295 million and make than one-third of their purchases outside the trade area.



The leakage analysis shows that the existing supply of businesses is not meeting the current market demand. In the primary trade area, there is approximately $22 million of sales leakage capable of supporting approximately 73,000 sq. ft. of additional commercial space. It is not expected that businesses within a trade area would capture 100% of the expenditures, however, if the businesses could capture 10% of this leakage, it would support another 7,300 sq. ft. of commercial space; 20% additional capture would support an additional 14,600 sq. ft.

The total sales leakage is spread over many retail and restaurant categories, therefore it is useful to examine the sales leakage by category and then compare the amount of leakage to the sales thresholds necessary to support new businesses. In the primary trade area, the most significant leakage is in the categories of: Full Service Restaurants. In the .5-mile trade area (around the intersection of Washington and Bowdoin), the most significant leakage is in the categories of: Full Service Restaurants, Other General Merchandise Stores, and Home Furnishings. In addition, there might be opportunity to draw customers from a 1-mile trade area for new businesses that have unique offerings. In the 1-mile trade area, the most significant leakage is in: Grocery Stores, Electronics/Appliances, Home Furnishings, Furniture, Books/Periodical/Music Stores, Drinking Places, Sporting Goods/Hobby and Specialty Food. The other categories that show more modest amounts of leakage may also offer opportunities, but it would require an aggressive market capture scenario to support a new business.

In the categories that show very little or no leakage, the market opportunity for new businesses would depend on their ability to: attract customers from beyond the trade area, attract expenditures from non-residential market segments or offer higher quality, better priced or otherwise, more desirable products or services and therefore overtake/replace less desirable existing businesses. For example, in Four Corners, there might be additional opportunity for new businesses that would complement Mod Boston such as other retailers or services that target the same young urban consumer segment. However, the success of any new potential new business would depend on its ability to draw customers from well beyond the primary trade area as Mod Boston does.

In addition to residents, there are 1,589 employees that work within the primary trade area representing market opportunity for breakfast and lunchtime meal purchases as well as other convenience goods and services purchased before and after work. However, this likely does not represent an opportunity for new restaurants because the sales of existing limited-service restaurants significantly exceeds the resident demand, indicating that the restaurants are likely already capturing a large portion of employee food purchases.

The following chart provides an evaluation of new business opportunities based on current sales leakage and under-representation.

<table>
<tr><th colspan="7">Business Opportunity Assessment</th></tr>
<tr><th rowspan="2"></th><th colspan="3">Most Significant Sales Leakage[1]</th><th colspan="2">Under-Represented in the District by Comparison</th><th rowspan="2">Under-Represented in PTA[2] Compared to National Average

(# of businesses per person)</th></tr>
<tr><th>Primary Trade Area</th><th>.5-Mile Radius</th><th>1-Mile Radius</th><th>Selected Boston Business Districts</th><th>U.S. Shopping Centers</th></tr>
<tr><td>Furniture Stores</td><td></td><td></td><td>*</td><td rowspan="2">Y</td><td rowspan="2">Y</td><td rowspan="2">Y</td></tr>
<tr><td>Home Furnishings Stores</td><td></td><td>*</td><td>*</td></tr>
<tr><td>Electronics & Appliance</td><td></td><td></td><td>*</td><td>N</td><td>N</td><td>Y</td></tr>
<tr><td>Bldg. Material & Supplies</td><td></td><td></td><td></td><td rowspan="2">N</td><td rowspan="2">Y</td><td rowspan="2">Y</td></tr>
<tr><td>Lawn & Garden Equip/Sup.</td><td></td><td></td><td></td></tr>
<tr><td>Grocery Stores</td><td></td><td></td><td>*[3]</td><td rowspan="2">N</td><td rowspan="2">Y</td><td rowspan="3">N</td></tr>
<tr><td>Specialty Food Stores</td><td></td><td></td><td>*</td></tr>
<tr><td>Beer, Wine, and Liquor</td><td></td><td></td><td></td><td>Y</td><td>Y</td></tr>
<tr><td>Health & Personal Care</td><td></td><td></td><td></td><td>Y</td><td>Y</td><td>Y</td></tr>
<tr><td>Clothing Stores</td><td></td><td></td><td></td><td>N</td><td>N</td><td rowspan="3">N</td></tr>
<tr><td>Shoe Stores</td><td></td><td></td><td></td><td>Y</td><td>Y</td></tr>
<tr><td>Jewelry, Luggage, Leather</td><td></td><td></td><td></td><td>N</td><td>Y</td></tr>
<tr><td>Sport Goods/Hobby/Mus. Inst</td><td></td><td></td><td>*</td><td rowspan="2">N</td><td rowspan="2">Y</td><td rowspan="2">Y</td></tr>
<tr><td>Book, Periodical, and Music</td><td></td><td></td><td></td></tr>
<tr><td>Department Stores</td><td></td><td></td><td></td><td rowspan="2">Y</td><td rowspan="2">Y</td><td rowspan="2">Y</td></tr>
<tr><td>Other General Merchandise</td><td></td><td>*</td><td></td></tr>
<tr><td>Florists</td><td></td><td></td><td></td><td rowspan="4">Y</td><td rowspan="4">Y</td><td rowspan="4">N</td></tr>
<tr><td>Office Sup, Stationary, Gift</td><td></td><td></td><td></td></tr>
<tr><td>Used Merchandise Stores</td><td></td><td></td><td></td></tr>
<tr><td>Other Misc. Retailers</td><td></td><td></td><td></td></tr>
<tr><td>Full-Service Restaurants</td><td>*</td><td>*</td><td></td><td rowspan="3">Y</td><td rowspan="3">N</td><td rowspan="3">Y</td></tr>
<tr><td>Limited-Service Restaurants</td><td></td><td></td><td></td></tr>
<tr><td>Drinking Places (Alcoholic)</td><td></td><td></td><td>*</td></tr>
<tr><td>Financial/Insur./Real Estate</td><td>NA</td><td>NA</td><td>NA</td><td>Y</td><td>N</td><td>Y</td></tr>
<tr><td>Other Offices/Prof. Services</td><td>NA</td><td>NA</td><td>NA</td><td>Y</td><td>Y</td><td>NA</td></tr>
</table>

1. *Leakage amount sufficient to support a new business (typical store size) under a 60% capture rate scenario*
2. *PTA = Primary Trade Area*
3. *60% capture rate would support small grocery not a large supermarket.*

Part One: Purpose of the Study and Area Description

I. Purpose of the Study

This study is part of the Mid-Dorchester Action Plan being undertaken by the Boston Redevelopment Authority and the Department of Neighborhood Development. The purpose of the study is to provide information about existing conditions that will help inform the planning process. The objective is primarily two-fold: 1) to evaluate the business mix to determine what types of businesses might be under represented, and 2) to analyze the market in order reveal information about the district's potential customers and opportunities for new and existing businesses.

II. Area Description

The Mid-Dorchester Action Plan study area contains three business districts in the Dorchester area of Boston: the Four Corners Main Street District, the Bowdoin-Geneva Main Street District and the Codman Square Business District.

This report covers the Four Corners Business District. The commercial district is located along Washington Street between Columbia Road and School Street. The boundaries of this District are illustrated in Figure 1. While business activity is dispersed throughout the District, there are two nodes of concentrated commercial property: 1) the area around the intersection of Washington Street and Erie Street, near the planned MBTA Fairmont Line Commuter Station and 2) the area around the intersection of Washington Street and Bowdoin Street.

Figure 1.

Business District Map (*Source: Boston Redevelopment Authority*)

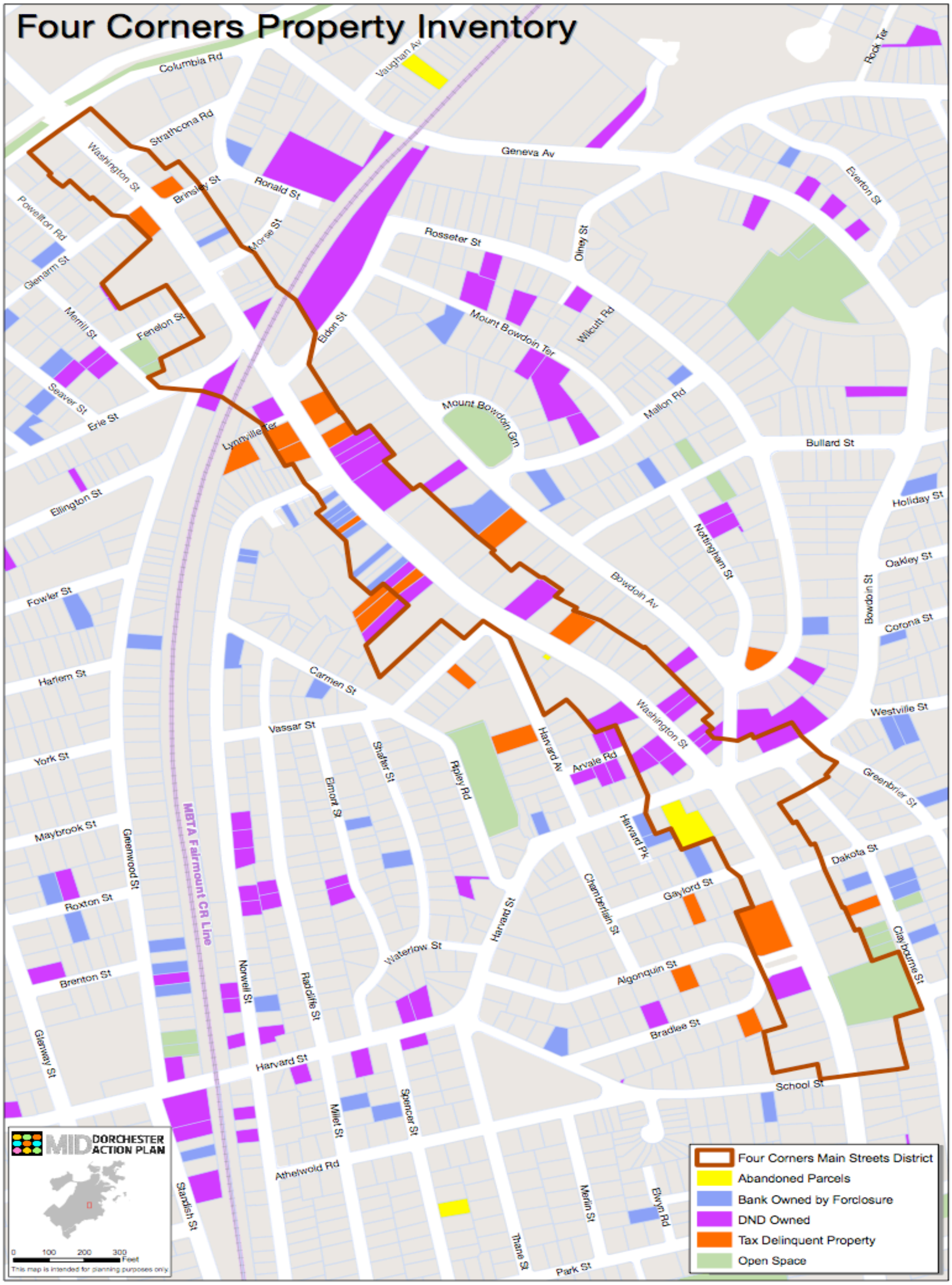


Figure 2.
Business District Images

Part Two: Business District Profile and Analysis of Commercial Mix

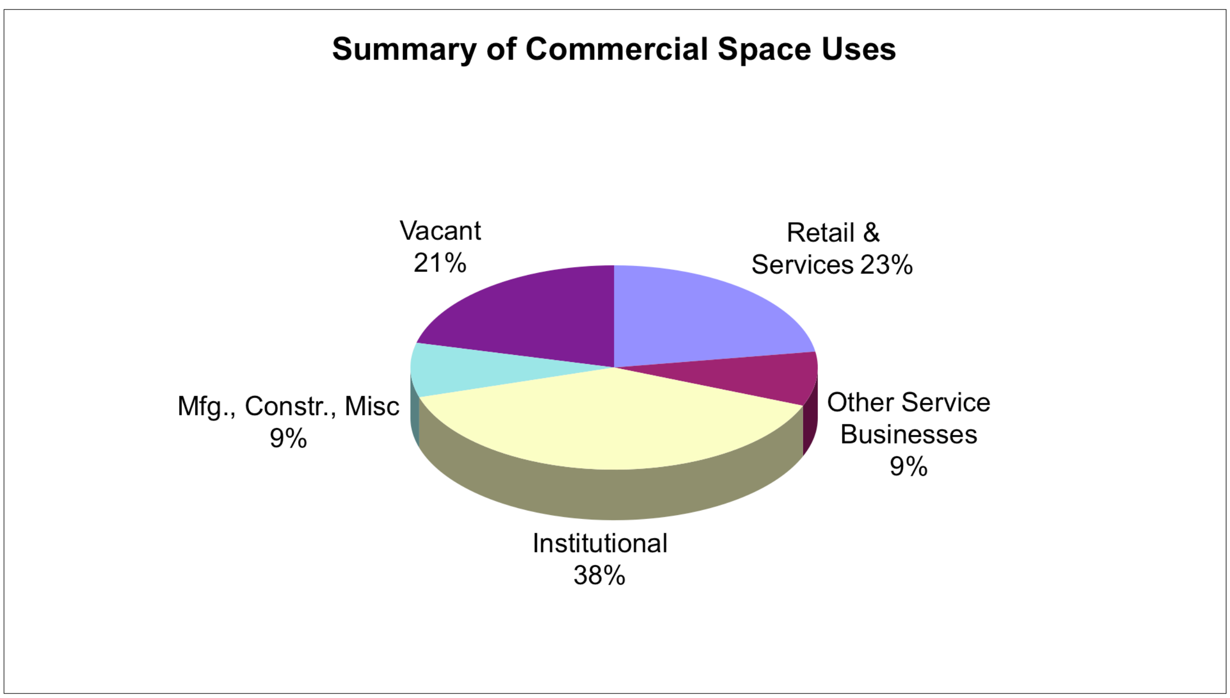
I. Commercial District Profile

A. Overview

In total, the Four Corners Business District encompasses approximately 174,000 square feet of commercial and institutional space "under roof" and contains approximately 68 establishments. A large percentage of the space (38%) is devoted to community uses such as nonprofit organizations and churches.

Approximately 23% of the space is devoted to the types of retail and services traditionally found in commercial districts or shopping centers (including stores, personal services, restaurants and professional services). Manufacturing and contractors comprise approximately 9% of the space and other service businesses account for 9%. About 9 commercial units are vacant totaling 37,000 square feet. The largest vacant building (27,000 s.f.) is located at 155 -157 Washington Street; the Codman Square Neighborhood Development Corporation plans to develop this site.

Figure 3.



B. Business Mix

The businesses in Four Corners are all small independently owned establishments; there are no chains or franchises in the District. Most businesses appear to draw their customers from the immediate surrounding neighborhood. One exception is Mod Boston, a young urban women's clothing store, which draws customers from many parts of the City. The owners of Mod Boston have recently opened a new store focusing on men's clothing, Mod Men, which will likely also draw from well beyond the immediate neighborhood. There are a few businesses that appear to specifically serve a Caribbean market segment (e.g., international shipping services/money transfer, Jamaican restaurants).

The District contains 40 retail and service establishments. The retail stores include several small convenience/food stores, two urban clothing stores, a small electronics store, and a religious products store. There are 7 restaurants in the District -- predominantly small casual limited-service dining places. There are two Jamaican restaurants, one Latin American, one chicken, one fish, a small take out kitchen and a pizza place. There is also a strong complement of personal services. In total, there are 12 beauty salons, barbershops and nail salons, 2 laundromats and a dry cleaner. Professional services are not well represented. There is one chiropractor but no other health care services. There are a few check cashing/money order and bill paying services but no bank.

In addition to the retail and service businesses, the District has a very strong presence of community institutions including 10 churches and 6 non-profit organizations. There are several auto related business in the District (i.e., 4 auto repair establishments and 1 gas station). The District is also home to a few contractors and other miscellaneous businesses that do not generate very many "walk-in customers".

C. Composition Analysis

Table 1.
Business District Composition

Retail, Personal and Professional Service	# of Businesses	GLA	Share of GLA
Retail	**11**	**12,725**	**32%**
Convenience Goods	**7**	**9,125**	**23%**
Food, Liquor	7	9,125	23%
Drugs, Health, Beauty	0	-	0%
Florist	0	-	0%
Shoppers Goods	**4**	**3,600**	**9%**
Apparel, Footwear, Jewelry	2	2,400	6%
Furniture, Home Furnishings	0	-	0%
Hobby/Special Interest	0	-	0%
Sporting Goods	0	-	0%
Gifts, Party Supply, Luggage, Trophies	0	-	0%
Hardware, Bldg. Materials, Paint	0	-	0%
Home Appliances/Computer/Music	1	500	1%
General Merchandise, Department Stores	0	-	0%
Other Retail (eyeglasses, fabric, office supply, pets, telecom.)	1	700	2%
Used Goods	0	-	0%
Auto Related Retail	0	-	0%
Services (Food Service, Personal and Professional)	**29**	**26,536**	**68%**
Food Service and Personal Services	**25**	**23,753**	**61%**
Restaurants and Bars	7	5,548	14%
Beauty, barber, nails, skin	12	11,923	30%
Laundry, dry cleaning	3	3,550	9%
Tailoring, shoe repair	1	766	2%
Printing, copying, packaging, delivery	0	-	0%
Video Rental	0	-	0%
Travel	0	-	0%
Other Personal Services	2	1,966	5%
Professional Services	**4**	**2,783**	**7%**
Health Care	1	800	2%
Finance, Insur, RE, Legal, Acctg	3	1,983	5%
Other Professional Services	0	-	0%
Total Retail and Services (Food, Personal and Prof.)	**40**	**39,261**	**100%**

** Gross Leasable Area*

**Analysis is based on business data provided by the Boston Redevelopment Authority and Four Corners Main Street*

Other Service Businesses	**# of Businesses**	**GLA**
Entertainment, Fitness, Function Halls	1	900
Hotels/Lodging	0	-
Auto Related Service	5	14,211
Total Other Service Businesses	**6**	**15,111**

Institutions	**# of Businesses**	**GLA**
Community/Government/Nonprofit	7	28,713
Religion	10	39,117
Schools/Education	0	-
Hospitals/Large Health Centers/Nursing Homes	0	-
Total Institutional	**17**	**67,830**

Manufacturing, Construction, Misc.	**# of Businesses**	**GLA**
Manufacturing	0	-
Construction/Contractors	3	6,468
Miscellaneous	2	8,620
Communications	0	-
Recycling	1	4,320
Utilities/Heating Oil	0	-
Other	1	4,300
Total Manufacturing, Construction, Misc.	**5**	**15,088**

All Businesses	**# of Businesses**	**GLA**
Retail and Services (incl. personal, prof. and food)	40	39,261
Other Service Businesses	6	15,111
Institutional	17	67,830
Manufacturing, Construction, Misc.	5	15,088
Total all Businesses	**68**	**137,290**

D. District Businesses by Type

Table 2.
Business Listing by Type

Food
4 CORNERS MARKET
DIALLO'S HALIL MEAT & GROCERY
FERNANDO COUSIN MARKET II
HORIZON VARIETY STORE AND CARGO PLUS
ROSELLY'S GROCERY
SANDY'S VARIETY STORE
SKB FOOD STORE

Food Service/Bars
FOUR CORNERS PIZZA
ISLAND STYLE JAMAICAN RESTAURANT
NICE N CLEAN JAMAICAN
ROSA'S KITCHEN
ROYAL FRIED CHICKEN
SANTA DOMINGO RESTAURANT & PIZZERIA
VAUGHAN FISH & CHIPS

Clothing and Accessories
MOD BOSTON
MOD MEN

Home Appliances/Computer/Music
COMMUNICATIONS CENTER INC

Other Retail and Used Goods
BOTANICA 21 DIVISION

Personal Care/Salon
AMANDA'S HAIR SALON
D DREAMS BEAUTY SALON
FONTES' BARBER SHOP
FRESH START
JACIAH'S HAIR DESIGN
K-ZEE AFRICAN HAIR BRAIDING
LAWSON'S BARBERSHOP
LAWSON'S BEAUTY SALON
MICHELLE'S NAILS
RODRIGUEZ BARBER SHOP
SALON 3
TAMMY'S BEAUTY PARLOR

Laundry,Cleaning,Tailor, Shoe Repair
CARLISLE'S BOUTIQUE & ALTERATIONS
LAUNDROMAT
NICK'S TAYLOR SHOP
RAINBOW LAUNDRY

Other Personal Services
CARRIBEAN INTERNATIONAL SHIPPING
ROGER'S PEST CONTROL

Auto Related Services
BROTHER AUTO BODY
COLUMBUS AUTO BODY & REPAIR
GOMEZ GAS & CONVIENCE
SANDMAN'S AUTO BODY & REPAIR
UNITED AUTO REPAIR

Finance, Insur, R.E., Legal, Acctg
BOSTON UNIVERSAL
PLAISANCE CHECK CASHING
RODRIGUEZ MULTI-SERVICE

Entertainment, Fitness, Functions
BOSTON SOCIETY OF VULCANS

Health Care
BOSTON COMMUNITY CHIROPRACTIC

Community Gov.,Nonprofits, Institutions
ASPIRES COMMUNITY CENTER
BOSTON RESTORE INC
CENTER FOR COMMUNITY
CHURCH OF GOD BETHEL OF
DELIVERANCE CHURCH OF LIVING
ELLA J. BAKER HOUSE
EPHESE SEVENTH-DAY ADVENTIST
FOUR CORNERS ACTION COALITION
FOUR CORNERS MAIN STREET
FRIENDSHIP APOSTOLIC
GREENWOOD MEMORIAL UNITED
IGLESIA DE DIOS PENTECOSTAL
KINGDOM HALL OF JEHOVAH WITNESSES
NEW BETHEL APOSTOLIC CHURCH
NEW TESTAMENT CHURCH OF GOD
REVIVAL DELIVERANCE TEMPLE
THE ARK OF THE COVENANT SPIRITUAL BAPTIST CHURCH

Other Businesses
CITY FRESH
COLEMAN'S CONSTRUCTION
FOUR CORNERS RECYCLE CORP.
SUPPLIES EXCHANGE SYSTEMS
SYSTEMS EXTERMINATING CONTRACTORS

E. Real Estate Conditions

Approximately 21% of the first floor commercial space is vacant (9 commercial units, totaling 37,000 square feet). In addition, there appears to be a large amount of underutilized property. Rents in the area appear to vary widely. A representative of Commonwealth Realty Services estimates that current commercial rents in the Business District run approximately $15 to $17 per s.f., depending on condition of the space. A representative of Four Corners Main Street noted that several tenants are paying rents well over $20 per s.f.

There were 6 commercial property sales in the Four Corners Business District between 2003 and 2008 as illustrated in Table 3. There were 5 sales of sites with buildings and 1 vacant lot. The median price per interior s.f. was $83 compared to $120 per s.f. in the overall Mid Dorchester Study Area. The median s.f. price by category for the Mid Dorchester area is illustrated in Table 4. The commercial land parcel in Bowdoin Geneva that sold during the period went for $75 per s.f. compared to a median price of $61 per s.f. in the overall Mid Dorchester Study Area.

<u>Table 3.</u>

Commercial Sales 2003 -2008

ADDRESS	Price	Usage	Lot S.F.	Interior S.F.	Price Per Interior S.F.	Date
213-217 Washington St	$355,890	Warehouse	3,615	9,821	$36	7/24/03
159-161A Washington St	$485,000	Shopping Center/Mall	4,250	2,279	$213	6/10/04
155 Washington St	$1,325,000	Manufacturing	30,784	26,694	$50	8/14/07
184-186 Washington St	$850,000	Mixed Use Resid. & Comm.	2,680	3,870	$220	6/29/04
200-A Washington St	$662,500	Mixed Use Resid. & Comm.	6,400	7,969	$83	5/27/05
257 Washington St	$220,000	Commercial Land	2,952	NA	NA	5/3/07

<u>Table 4.</u>

Mid Dorchester Study Area Sales Prices 2003 -2008

Property Usage	Median Price Per Interior S.F.		Property Usage	Median Price Per Interior S.F.
Auto Repair	$56		Mixed Use Comm. & Resid.	$106
Commercial Condo	$221		Nursing Home	$63
Fraternal Organization	$55		Restaurant/Bar	$140
Gas/Service Station	$615		Retail Store	$370
General Office	$191		Shopping Center/Mall	$167
Laundry	$324		Treatment Facility	$86
Manufacturing	$50		Warehouse	$77
Mixed Use Resid. & Comm.	$126		All	$120

Commercial Land	$61	**Per Lot S.F.**

II. Analysis of Business Mix Compared to Other Commercial Centers

A. Shopping Center Typology and Comparison

One way to analyze a business district is to examine its size and tenant mix and then compare this data to information we can obtain about comparable shopping centers. In this section, we are only analyzing the retail and service portion of the Business District; we are not including institutional uses (community, government, etc.). To begin, it is helpful to identify the type of center that the business district most closely resembles. The Urban Land Institute distinguishes several types of shopping centers as illustrated below.

Type of Shopping Centers[1]

Type of Center	Approximate Size (sq. ft. floor area)	Tenant Types
Convenience	< 30,000	Personal services (beauty, laundry) & convenience goods (food, drugs), possible mini market anchor
Neighborhood	30,000 – 100,000	Personal services and convenience goods for day to day living needs; often including dry cleaning, beauty shops, small restaurants and take-outs
Community	100,000 – 500,000 or more	In addition to personal & convenience goods, wider range of soft lines (apparel) and hard lines (appliance, hardware). Often has discount, junior department, variety store or super drug addition to supermarket. Although, no full–line department store, may have strong specialty stores.
	250,000 +	Super Community Center- community center that contains over 250,000 sq. ft.
Power Center	250,000 - 1,000,000	Community Center that contains ≥4 category-specific, off-price anchors of 20,000 sq. ft. or more; typically electronics, sporting goods, home improvement, furnishings, drugs, HBA, toys, computers, narrow focus, "category killers" along with more broadly merchandised stores
Regional	Typically around 500,000 (250,000 – 900,000)	General merchandise, apparel, furnishings. In-depth variety of retail, services and recreation facilities, may have 1 – 2 department stores
Super Regional	Typically around 1,000,000 (500,000 – 1,500,000)	Extensive variety of general merchandise, apparel, furnishings as well as services & recreation facilities. Three or more department stores.

In size, the type of center that the Four Corners Business District most closely resembles is a Neighborhood Shopping Center. The retail and service portion of the District fits within the typical size range for a neighborhood center. The following section of this report compares the tenant mix of the Business District to a typical neighborhood shopping center.

[1] Dollars and Cents of Shopping Centers, Urban Land Institute, Washington, DC 2006

B. Mix of Convenience Goods, Comparison Goods and Services

To start, we can compare the Business District to typical shopping centers by reviewing the broad categories of convenience goods, shoppers goods and services. Definitions for these terms are provided below.

Convenience Goods: Goods that people buy often and don't travel far to acquire (e.g., food, drugs, health and beauty aids. People typically purchase where it is most convenient near home, work, or temporary residence when traveling.

Shoppers Goods: Goods which consumers spend the most effort to acquire and have the greatest desire for comparison shopping. Trade area is often governed by desire to comparison shop and therefore size is affected by availability of such goods. (e.g. clothing, furniture, etc.)

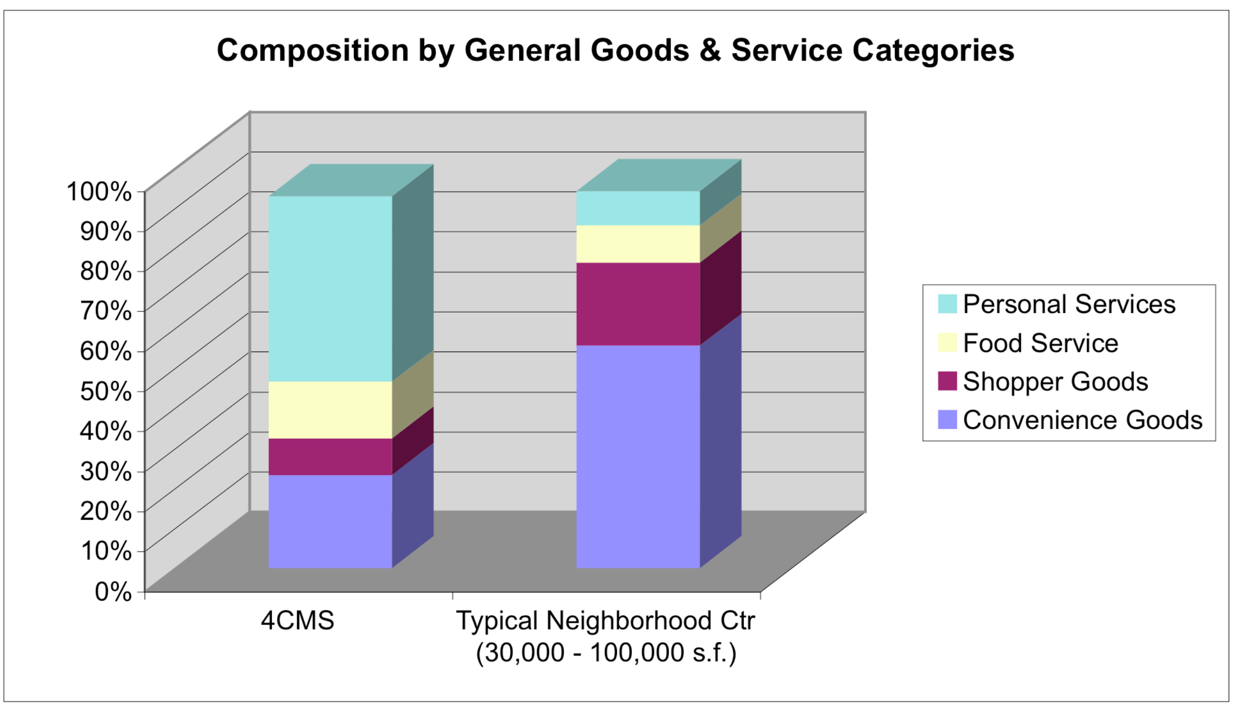
Personal Services: Services required on a frequent basis and acquired where it is most convenient (e.g. dry cleaners, beauty/barber/nail salon, etc.)

Food Services: Eating and drinking establishments

Professional Services: Services such as financial, insurance, legal, medical, dental, etc.

As the following chart indicates, the Business District contains a much higher percentage of service businesses than typical shopping centers. Conversely, it has a much smaller percentage of retailers. This would be expected to some degree, as Business Districts often contain more services than other commercial shopping centers. However, it is useful to note how small a percentage of retail there is compared to services. Approximately 32% of the space is occupied by retail uses compared to approximately 75 - 80% in typical shopping centers. The Business District has a much smaller proportion of both convenience goods and shoppers goods.

Figure 4.

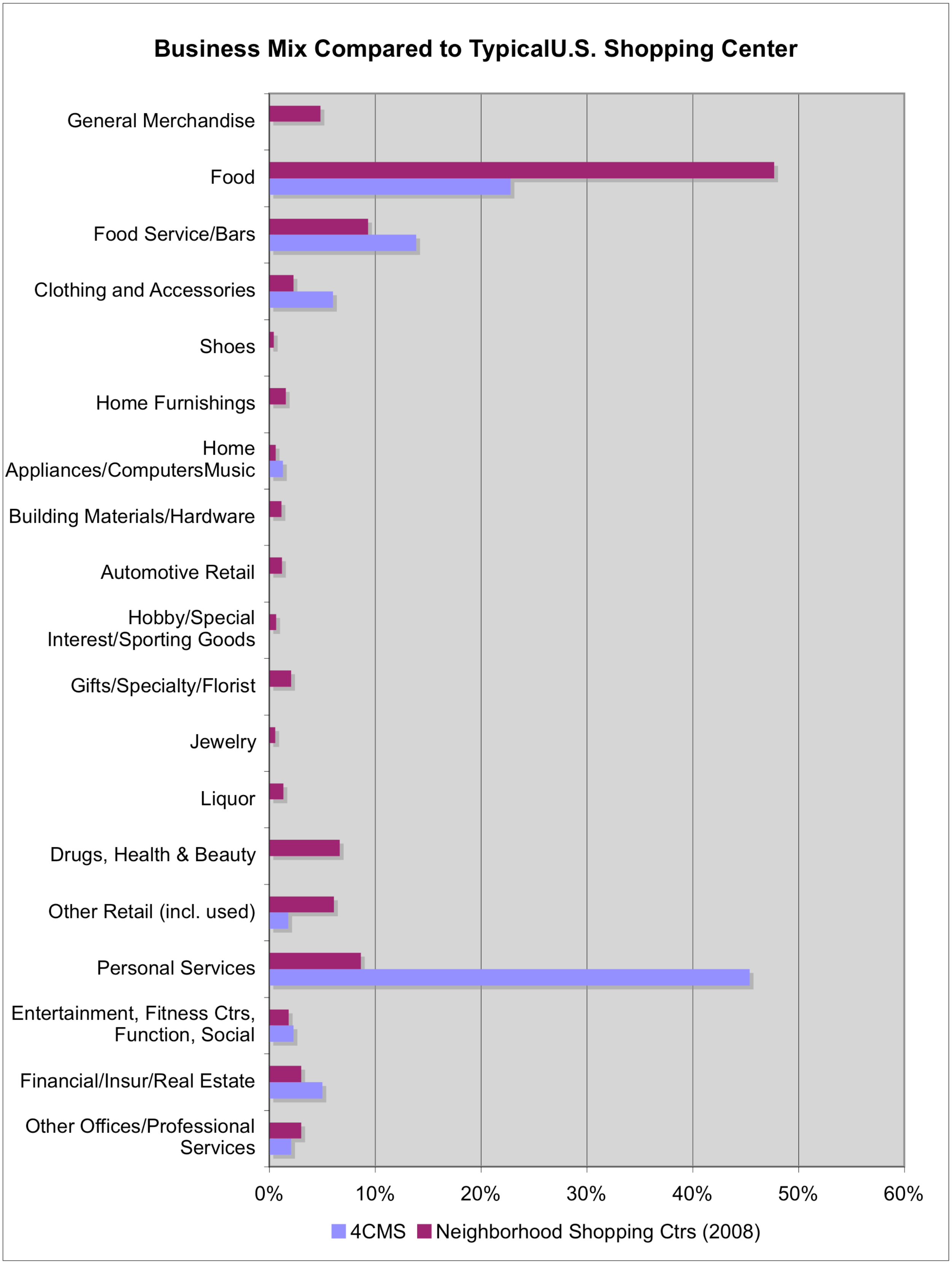


The Business District is composed of only about 9% shoppers goods compared with 21% in typical neighborhood centers and 43% in typical community centers. Establishments that sell shoppers goods are particularly important as they tend to draw customers into the area from greater distances and expand the trade area for other businesses in the District. Customers often go to an area to purchase shoppers goods and, while in the area, also buy convenience goods and services. The depth of shoppers good offerings is often tied to the center's ability to maintain its customer base and generate crossover shopping patronage for other businesses. Therefore, encouraging the recruitment/expansion of shoppers goods businesses is one strategy that should be considered.

C. Tenant Category Comparison

The following chart shows the current mix of businesses in the Business District compared to a typical shopping center. The biggest differences in the Business District is the relative lack of 1) food, 2) drugs, health and beauty, and 3) general merchandise. Other categories in which the District has a smaller percentage include: shoes, home furnishings, building materials/hardware, automotive retail, hobby/special interest/sporting goods, gifts, jewelry and liquor.

Figure 5.


Business Mix Compared to TypicalU.S. Shopping Center
General Merchandise
Food
Food Service/Bars
Clothing and Accessories
Shoes
Home Furnishings
Home Appliances/ComputersMusic
Building Materials/Hardware
Automotive Retail
Hobby/Special Interest/Sporting Goods
Gifts/Specialty/Florist
Jewelry
Liquor
Drugs, Health & Beauty
Other Retail (incl. used)
Personal Services
Entertainment, Fitness Ctrs, Function, Social
Financial/Insur/Real Estate
Other Offices/Professional Services
0%
10%
20%
30%
40%
50%
60%
4CMS
Neighborhood Shopping Ctrs (2008)

D. Comparison of Most Frequently Found Tenants

The chart below contains a list of the most frequently found tenants in U.S. Shopping Centers. The District contains a few of these frequently found tenant types, however it is missing several common tenants as indicated below.

Table 5.

Most Frequently Found Tenants in U.S. Neighborhood Centers		Present in Business District
Rank	Business Type	
1	Supermarket	N
2	Medical and dental	N (1 chiropractor)
3	Unisex hair salon	Y
4	Nail salon	Y
5	Pizza	Y
6	Restaurant with liquor	N
7	Dry Cleaner	Y
8	Sandwich shop	? (casual restaurants)
9	Chinese Fast Food	N
10	Women's hair salon	Y
11	Bank	N
12	Dollar store/novelties	N
13	Restaurant without liquor	Y
14	Drugstore/pharmacy	N
15	Video/CD/DVD rental*	N
16	Telephone/Telecom store	Y
17	Liquor/wine	N
18	Coffee/tea	N
19	Insurance	N
20	Mailing/packaging	? (international shipping)

** Video rental stores are becoming less frequent as other business models have emerged (e.g. Netflix, Red Box, etc.)*

Source: Dollars and Sense of Shopping Centers, Urban Land Institute, Washington, DC 2008

E. Comparison to Other Business Districts

For analysis purposes, it is also useful to compare the business district being studied with other neighborhood business districts. In the following chart, the mix of businesses in Four Corners is compared with Upham's Corner, Egelston Square, and Hyde/Jackson Square.

Compared to these other business districts, the categories that appear to be under-represented include: general merchandise, shoes, home furnishings, home appliances, gifts/specialty, auto-related retail, liquor, drugs/health & beauty, financial/real estate/insurance and other professional services/health care.

Table 6.
Comparison with Other Commercial Districts

Business Type	4CMS	Upham's Corner	Egleston Square	Hyde/ Jackson
	Share of Sq. Ft.	Share of Sq. Ft.	Share of Sq. Ft.	Share of Sq. Ft.
General Merchandise	0%	4%	1%	1%
Food	23%	3%	7%	34%
Food Service/Bars	14%	8%	8%	15%
Café/Coffe Shops	0%	0%	0%	1%
Ice Cream/Yogurt	0%	0%	0%	0%
Other Restaurants	14%	7%	7%	13%
New Clothing and Accessories	6%	4%	1%	8%
Shoes	0%	2%	0%	2%
Home Furnishings Retail	0%	10%	3%	5%
Home Appliances/Computer/Music	1%	1%	1%	2%
Home Appliances	1%	1%	0%	0%
Computers/Software	0%	0%	0%	0%
Music	0%	0%	1%	1%
Building Materials/Hardware	0%	0%	5%	0%
Automotive Retail	0%	0%	1%	2%
Hobby/Special Interest/Sporting Gds	0%	0%	0%	0%
Art	0%	0%	0%	0%
Books/Comics	0%	0%	0%	0%
Collectibles	0%	0%	0%	0%
Photography/Film	0%	0%	0%	0%
Toys	0%	0%	0%	0%
Sporting Goods	0%	0%	0%	0%
Gifts/Specilaty/Florist	0%	1%	0%	2%
Gifts	0%	0%	0%	0%
Party Goods	0%	1%	0%	2%
Luggage	0%	0%	0%	0%
Trophies	0%	0%	0%	0%
Florists	0%	0%	0%	0%
Jewelry	0%	0%	1%	0%
Liquour	0%	1%	1%	3%
Drugs, Health & Beauty	0%	5%	6%	1%
Other Retail and Used Goods	2%	0%	1%	2%
Fabric/Sewing	0%	0%	0%	0%
Office Supplies	0%	0%	0%	0%
Pet Sales/Supply	0%	0%	0%	0%
Beepers/Cellular	0%	0%	1%	2%
Eyeglasses-Optician	0%	0%	0%	0%
Other-Retail	2%	0%	1%	1%
Used Goods	0%	0%	0%	0%
Personal Services	45%	14%	56%	14%
Entertainment, Fitness, Function Halls	2%	18%	0%	0%
Financial/Insur/Real Estate	5%	14%	6%	6%
Other Offices/Health Care/Prof. Serv.	2%	15%	2%	3%
Health Care	2%	15%	2%	3%
Other Professional Services	0%	0%	0%	0%
Total	100%	100%	100%	100%

Part Three: Market Area Assessment

I. Overview of the Market

The Business District is positioned to be able to serve surrounding residents as well as employees of area businesses.

A. Residents of the Surrounding Area
The major potential customer base for the Business District is the adjacent residential population. The primary trade area (where most of the sales would be expected to generate from) contains approximately 10,000 residents.

For the purpose of this study, because there are several vacant properties near the Intersection of Washington Street and Bowdoin Street, we also examined potential trade areas specifically around this intersection including a .5 mile and 1-mile radius. These trade areas contain approximately 18,000 and 65,000 residents respectively. Potential market capture would, of course, depend on the quality and uniqueness of the proposed new retail/service offering and its ability to attract customers from these distances.

B. Employees of Area Businesses
In addition to the residential customer base, there is a daytime population of employees that work in close proximity to the business district. Close to 1,600 employees work within the Primary Trade Area. This segment represents opportunity for breakfast and lunchtime meal purchase as well as other convenience goods and services purchased before and after work.

Each of these markets are described in more detail in the following sections of this report.

II. Customer Base Analysis and Market Segmentation

A. Trade Area Definition

Defining the trade area is the first step in determining market potential for a commercial district. Once the trade area is defined, we can quantify the amount of potential customers that live within the area as well as examine their lifestyle characteristics and buying habits to provide a picture of the potential market.

<u>Business District Primary Trade Area</u>
The term retail trade area refers to the geographic area from which a retail entity generates its sales. The <u>primary</u> trade area for a commercial center, such as a business district, downtown or shopping plaza is the area where most of the steady, repeat customers live (typically, where 65-80% of the total sales are generated). A combination of factors determines the size and boundaries of the primary trade area including: travel time and distance for shoppers, travel patterns, location of competing commercial centers, physical barriers that might effect access, socio economic characteristics, and the size and scope of the commercial center itself. (Generally, the larger the variety,

breadth and uniqueness of the merchandise offerings, the greater distance that customers are willing to travel, and therefore, the larger the trade area will be.)

Consumer surveys and customer spotting analyses can help to determine the existing primary trade area for a business district, however, these research activities are beyond the scope of this study. Therefore, an estimation regarding the primary trade area boundaries was based upon information from community representatives and the Boston Redevelopment Authority. Representatives from Four Corners Main Street, Bowdoin Geneva Main Street and Codman Square Neighborhood Development Corporation provided information about competing commercial facilities, socioeconomic barriers, and local shopper/travel patterns in order to determine the estimated trade area boundaries. The Four Corners Business District is closely surrounded by several other neighborhood commercial centers including Grove Hall/Mecca Mall, Uphams Corner, Bowdoin/Geneva, Codman Square and the Blue Hill Avenue Corridor. It was determined that the likely primary trade area for the Four Corners Business District is the area illustrated in Figure 6.

It should be noted that a primary trade area for a business district is defined based on the aggregate of all businesses in the District and represents the trade area for most businesses. This does not mean that all businesses in the District draw from exactly the same area. A few businesses that have unique offerings might be drawing from beyond the primary trade area. For example, Mod Boston, a specialty clothing store in the District, currently attracts customers from many parts of Boston.

Site-Specific Potential Trade Areas

Although, in general, the potential for new retail development in a business district is based upon the market demand in the primary trade area, it should be noted that in some cases, the potential might not necessarily be limited to the primary trade area. First, a new business could draw from beyond the primary trade area if the use is a very unique specialty offering or, if the use, by its nature, has an established name and strong destination draw, essentially bringing a market with it (such as a chain restaurant). Second, depending on the location of a particular site within the District, the market access for a business located on that site could be somewhat different than in the rest of the business district. For example, the potential customer draw for a site at the north end of the district could be different from a site at the south end of the District located ½ mile away. In dense urban environments, potential retail developers often look at the potential expenditures of the population located within a .5 mile radius or 1 mile radius of the site.

Therefore, for the purposes of this study, in order to provide additional information that could be useful to potential developers, we also examined potential site-specific trade areas -- a .5 mile and 1 mile radius around the intersection of Washington Street and Bowdoin Street (where several vacant city-owned properties are located). (See Figure 7)

The demographic and consumer characteristics of the population in the trade areas are described throughout this section.

Figure 6.

Business District Primary Trade Area

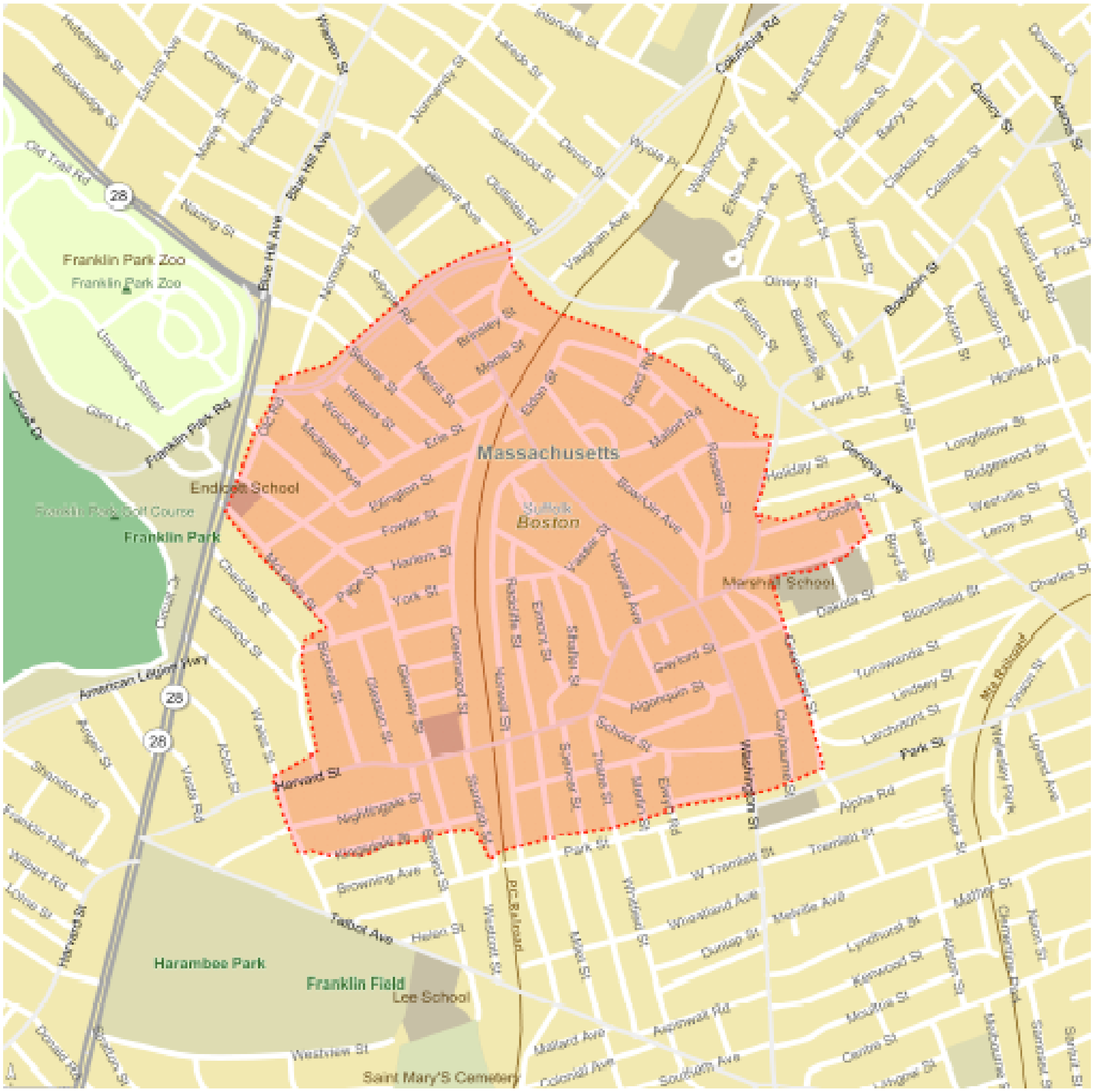
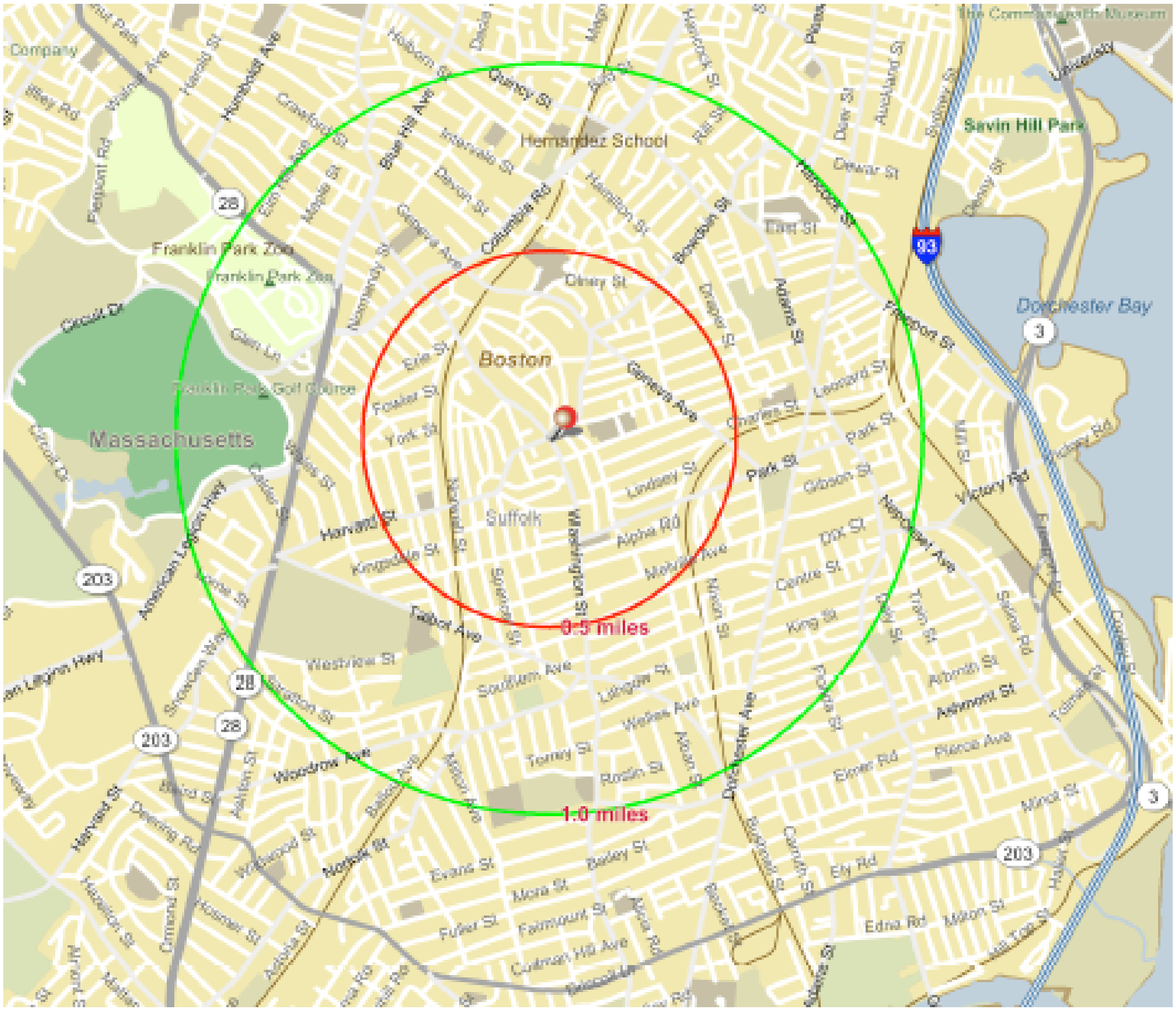


Figure 7.

Site-Specific Potential Radius Trade Areas (intersection of Washington & Bowdoin Streets)



. 5-Mile Radius

1-mile Radius

B. Demographics of Trade Area Residents

A demographic summary of the trade areas is presented in Table 7. Demographics for the City of Boston are included for comparison purposes.

<u>Business District Primary Trade Area</u>
There are approximately 10,013 people living within the primary trade area. The population consists primarily of moderate-income families. The estimated median household income for 2008 is $43,569, about 81% of the City-wide median. Close to one-quarter of the households earn over $75,000 per year. 40% of the population over the age of 25 has at least some college education (compared to 55% in Boston). The population is predominantly African American (81%) with a small portion composed of other races (4% White, 2% Asian and Native American, 9% some other race and 5% more than one race). In addition, 16% of the population is Hispanic.

Compared to Boston overall, the primary trade area population, on average, is younger and much more likely to have children in the household. The population is comprised predominantly of family households (75%). 51% of the households contain children compared to only 25% City-wide. The median age of the population is 28.7, about 11% lower than in Boston. 33% of the homes are owner-occupied, very similar to city-wide rate.

More than one-third of the households do not have a vehicle and therefore are dependent on public transportation or walking to acquire goods and services. This represents a market segment that is more likely to make purchases close to home.

<u>Site-Specific Potential Trade Areas</u>
There are approximately 17,729 people living within ½ mile of the intersection of Washington and Bowdoin and 65,063 residents living within 1 mile. The characteristics of the residents in these areas are fairly similar to the primary trade area population. However, in the .5-mile trade area, the median household income is slightly higher ($46,229) as is the rate of owner occupied housing (36%). The population increases in racial diversity with distance and the 1-mile trade area has a higher percentage of Hispanic residents.

Table 7.

Demographic Summary

Demographics	Primary Trade Area	.5 Mile Radius	1 Mile Radius	Boston
Population				
Population (2000)	9,974	18,070	65,960	589,141
Population (2008)	10,013	17,729	65,063	582,723
Population (2013)	10,013	17,621	64,751	580,878
Households				
Households (2000)	3,159	5,445	21,219	239,528
Households (2008)	3,214	5,401	21,051	239,438
Households (2013)	3,227	5,388	21,000	239,324
Income				
Median HH Income (2000)	$34,495	$36,386	$31,127	$39,634
Median HH Income (2008)	$43,569	$46,229	$40,192	$53,574
Median HH Income (2013)	$51,541	$53,758	$47,870	$65,562
Average HH Income (2000)	$44,335	$47,034	$40,554	$55,865
Average HH Income (2008)	$55,559	$59,952	$52,541	$77,922
Average HH Income (2013)	$62,395	$66,477	$59,534	$95,551
Per Capita Income (2000)	$14,097	$14,635	$13,497	$23,353
Per Capita Income (2008)	$17,976	$18,405	$17,135	$32,873
Per Capita Income (2013)	$20,265	$20,482	$19,468	$40,337
Characteristics				
Median Age (2008)	28.7	29.0	28.9	32.1
Avg. persons per Household (2008)	3.10	3.27	3.07	2.30
Married Couple Households (2000)	27%	31%	28%	27%
Other Family (no spouse) (2000)	48%	46%	44%	21%
Single Person Households (2000)	19%	17%	21%	37%
Roommate Households (2000)	6%	6%	7%	15%
Households with Children (2000)	51%	53%	50%	25%
Households with Persons Over 65	18%	17%	16%	19%
Households with no vehicle (2000)	36%	34%	38%	35%
Educational Attainment (25+) (2000)				
Less than High School	25%	27%	27%	17%
High School Graduate	35%	33%	34%	25%
Some College, No Degree	17%	17%	17%	13%
Associate Degree	8%	7%	6%	5%
Bachelor's Degree	11%	12%	11%	22%
Master's/Prof/Doctorate Degree	4%	5%	5%	18%
Race & Ethnic Origin[2] (2008)				
White Alone	4%	6%	10%	49%
Black/African American Alone	81%	72%	62%	27%
Native American Alone	1%	1%	1%	0%
Asian Alone	1%	4%	8%	10%
Some Other Race Alone	9%	11%	13%	9%

Two or More Races	5%	6%	7%	5%
Hispanic	16%	16%	19%	17%
Housing Tenure (2008)				
Owner Occupied Housing	33%	36%	29%	32%
Renter Occupied Housing	57%	55%	62%	60%
Vacant Housing Units	10%	9%	9%	7%

1 Data Sources: U.S.Census 2000, ESRI BIS forecasts for 2008 & 2013.

2 Hispanic origin is considered separately from race. Race categories excluding Hispanic should total to 100%.

D. Resident Lifestyle Segmentation

Businesses use "segmentation" to identify their best customers and determine the best way to market to them. The segmentation theory is based on the premise that people with similar lifestyle characteristics tend to make purchases in a similar manner. For example, young renters spend less money on home furnishings and home improvement and more money on clothing and eating out. Segmentation information is useful in projecting consumer expenditures and determining appropriate retail strategies for an area. Knowing information about lifestyle segmentation can help businesses locate appropriate sites and choose appropriate advertising media.

This section provides descriptive information about the residents of the trade area. The Tapestry™ consumer classification system was applied in order to identify and illustrate the types of consumer clusters that are present. These clusters are demographically and behaviorally distinct consumer groups with specific buying preferences. The Tapestry™ classification system includes 65 consumer groups in all; the following chart includes the most prevalent clusters present in the trade area.

Table 8.

Most Prevalent Tapestry Market Segments *			
Top Segments	**Primary Trade Area**		**U.S.**
City Strivers	3,066	95.4%	0.7%
City Commons	93	2.9%	0.7%
High Rise Renters	58	1.8%	0.7%
Subtotal		100%	2.1%
Top Segments	**.5 Mile Radius**		**U.S.**
City Strivers	5,163	95.6%	0.7%
City Lights	130	2.4%	1.0%
High Rise Renters	70	1.3%	0.7%
City Commons	38	0.7%	0.7%
Subtotal		100%	3.1%
Top Segments	**1 Mile Radius**		**U.S.**
City Strivers	12,041	57.2%	0.7%
International Marketplace	3,663	17.4%	1.3%
City Commons	1,874	8.9%	0.7%
High Rise Renters	1,495	7.1%	0.7%
City Lights	1,263	6.0%	1.0%
Subtotal		97%	4.4%

Trade Area - Most Prevalent Tapestry Market Segments *

City Strivers City Striver households are composed of a mix of family types. Half of employed residents work in the service industry, particularly in health care. Primary spending is for groceries, baby products, and children's essentials. Residents enjoy going to dance performances, football and basketball games, and Six Flags theme parks. They listen to urban, all-news, and jazz radio formats and watch TV, especially movies, sitcoms, news programs, courtroom TV and talk shows, tennis, and wrestling.

City Commons Single-parent families or singles who live alone comprise most of these very young households. (median age of 24.6) Approximately half of the households have children. Some homes are multigenerational. Household size is larger than national average. Most are renters. More residents work part time instead of full time. Unemployment rate is above average. Baby and children's products are the major purchases. They shop primarily at discount stores. Most families enjoy fast food several times per month. Most households do not rent videos; some go to the movies occasionally. They prefer to watch courtroom TV shows; listen to gospel, urban, and jazz programs on the radio.

High Rise Renters Predominantly renters, they represent a diverse mix of cultures; many speak a language other than English. Mainly single parent and single person households. Residents engage in fitness activities/ aerobics and play soccer. They enjoy dancing; attending basketball and football; watching movies on DVD; and listening to all-news, urban, and Hispanic radio. They watch a variety of news and are avid daytime TV viewers.

City Lights City Lights neighborhoods are diverse. This dense, urban market is a mixture of housing, household types, and cultures, sharing the same city sidewalks. Households include both families and singles. City Lights residents are more likely to spend for household furnishings than home maintenance. They shop at a variety of stores, especially Macy's, Lord & Taylor, The Disney Store, The Gap, and BJ's Wholesale Club. They favor overseas travel.

International Marketplace They are a rich blend of cultures and household types. Married couples with children and single parents with children represent 44 percent of households. Top purchases include groceries and children's clothing. Residents shop at stores such as Marshalls and Costco, but for convenience, also stop at 7-Eleven or other similar stores. They are loyal listeners of Hispanic radio programs and prefer to watch movies and sports on TV.

* This data was purchased form ESRI Business Information Solutions which updates Tapestry™ data annually using a variety of national and local sources.

E. Trade Area Resident Expenditures

Given the demographic, lifestyle and other consumer characteristics of the trade area population (presented in the previous section), their total annual expenditures for a variety of retail goods and services can be estimated. Table 9 represents the annual retail market demand. These expenditures are currently being made by residents at a variety of locations both inside and outside of the identified trade area. The residents of the primary trade area spend close to $48 million at retail stores and restaurants. The residents that live within 1/2 mile from the intersection of Washington and Bowdoin spend $87 million and the residents that live within 1 mile spend $295 million.

Table 9.

Resident Annual Expenditures

	Primary Trade Area	**.5 Mile Radius**	**1 Mile Radius**
	$ Amount	$ Amount	$ Amount
Furniture & Home Furnishings Stores	$2,378,096	$4,319,583	$15,014,153
Furniture Stores	$1,214,764	$2,203,939	$7,683,844
Home Furnishings Stores	$1,163,332	$2,115,644	$7,330,309
Electronics & Appliance Stores	$2,497,969	$4,528,236	$15,711,967
Bldg Materials, Garden Equip.	$1,630,931	$2,984,881	$10,096,717
Building Material & Supplies	$1,609,280	$2,945,427	$9,966,211
Lawn and Garden Equip & Sup.	$21,651	$39,454	$130,506
Food & Beverage Stores	$14,232,309	$25,733,260	$87,642,956
Grocery Stores	$12,268,784	$22,179,889	$75,556,489
Specialty Food Stores	$657,007	$1,187,959	$4,056,773
Beer, Wine, and Liquor Stores	$1,306,518	$2,365,412	$8,029,694
Health & Personal Care Stores	$3,343,171	$6,042,453	$20,417,590
Clothing & Clothing Accessories	$5,543,913	$10,023,068	$34,249,018
Clothing Stores	$4,554,704	$8,233,654	$28,114,705
Shoe Stores	$552,459	$995,952	$3,399,713
Jewelry, Luggage, & Leather Gds	$436,750	$793,462	$2,734,600
Sporting Goods, Hobby, Book, Music	$1,332,690	$2,410,151	$8,370,623
Sporting Goods/Hobby/Music Instr.	$525,903	$952,917	$3,308,742
Book, Periodical, and Music Stores	$806,787	$1,457,234	$5,061,881
General Merchandise Stores	$4,535,463	$8,203,937	$28,081,962
Department Stores	$1,081,554	$1,958,736	$6,772,434
Other General Merchandise Stores	$3,453,909	$6,245,201	$21,309,528
Miscellaneous Store Retailers	$1,325,940	$2,403,265	$8,144,792
Florists	$210,919	$384,389	$1,269,772
Office Supplies, Stationery, and Gift	$464,215	$841,920	$2,869,034
Used Merchandise Stores	$40,040	$72,436	$250,413
Other Miscellaneous Retailers	$610,766	$1,104,520	$3,755,573
Food Services & Drinking Places	$10,977,702	$19,878,815	$67,225,553
Full-Service Restaurants	$6,132,298	$11,103,929	$37,544,511
Limited-Service Eating Places	$3,312,719	$5,997,590	$20,316,498
Special Food Services	$887,973	$1,607,664	$5,445,290
Drinking Places (Alcoholic Bev.)	$644,712	$1,169,632	$3,919,254
Total	$47,798,184	$86,527,649	$294,955,331

Source: ESRI

III. Other Primary Trade Area Economic Conditions

A. Businesses and Employment

There are 268 businesses located in the primary trade area employing 1,589 people. The industry categories with the largest numbers of employees are: 1) Other Services, 2) Retail Trade, 3) Health Care and Social Assistance.

Table 10.

Businesses and Employment by Industry Category	**Businesses**		**Employees**	
	#	**%**	**#**	**%**
Agriculture, Forestry, Fishing and Hunting	0	0.0%	0	0.0%
Mining	0	0.0%	0	0.0%
Utilities	0	0.0%	0	0.0%
Construction	9	3.4%	21	1.3%
Manufacturing	3	1.1%	20	1.3%
Wholesale Trade	9	3.4%	19	1.2%
Retail Trade	41	15.3%	154	9.7%
Motor Vehicle and Parts Dealers	2	0.7%	4	0.3%
Furniture and Home Furnishings Stores	0	0.0%	0	0.0%
Electronics and Appliance Stores	2	0.7%	27	1.7%
Building Material and Garden Equipment and Supplies Dealers	2	0.7%	6	0.4%
Food and Beverage Stores	10	3.7%	18	1.1%
Health and Personal Care Stores	3	1.1%	18	1.1%
Gasoline Stations	0	0.0%	0	0.0%
Clothing and Clothing Accessories Stores	13	4.9%	62	3.9%
Sporting Goods, Hobby, Book, and Music Stores	0	0.0%	0	0.0%
General Merchandise Stores	6	2.2%	10	0.6%
Miscellaneous Store Retailers	2	0.7%	7	0.4%
Nonstore Retailers	1	0.4%	3	0.2%
Transportation and Warehousing	5	1.9%	8	0.5%
Information	9	3.4%	24	1.5%
Finance and Insurance	13	4.9%	33	2.1%
Central Bank; Credit Intermediation and Related Activities	6	2.2%	11	0.7%
Securities, Commodity Contracts, and Other Financial & Related	6	2.2%	20	1.3%
Insurance Carriers and Related Activities; Funds, Trusts & Other	1	0.4%	2	0.1%
Real Estate and Rental and Leasing	11	4.1%	32	2.0%
Professional, Scientific, and Technical Services	23	8.6%	73	4.6%
Management of Companies and Enterprises	10	3.7%	26	1.6%
Administrative, Support and Waste Management/Remediation	0	0.0%	0	0.0%
Legal Services	14	5.2%	18	1.1%
Educational Services	8	3.0%	151	9.5%
Health Care and Social Assistance	30	11.2%	625	39.3%
Arts, Entertainment, and Recreation	3	1.1%	34	2.1%
Accommodation and Food Services	15	5.6%	107	6.7%
Accommodation	2	0.7%	0	0.0%
Food Services and Drinking Places	13	4.9%	107	6.7%
Other Services (except Public Administration)	63	23.5%	233	14.7%
Automotive Repair and Maintenance	7	2.6%	32	2.0%
Public Administration	3	1.1%	36	2.3%
Unclassified Establishments	9	3.4%	1	0.1%
Totals	**268**	**100.0%**	**1,589**	**100.0%**

Source: Business data provided by InfoUSA, Omaha NE Copyright 2008, all rights reserved.

B. Availability of Retail and Services

Figure 8 illustrates the number of businesses per person in the primary trade area compared to the United States overall. The primary trade area (PTA)contains fewer businesses per person in the following categories:

- Restaurants & Bars
- Banks
- Miscellaneous Retail
- Sporting, Hobby, Book, Music
- Gas Stations*
- Building Materials
- Electronics/ Appliance
- Furnishings
- Motor Vehicle & Parts*

On the other hand, the PTA has more of the following businesses per person:

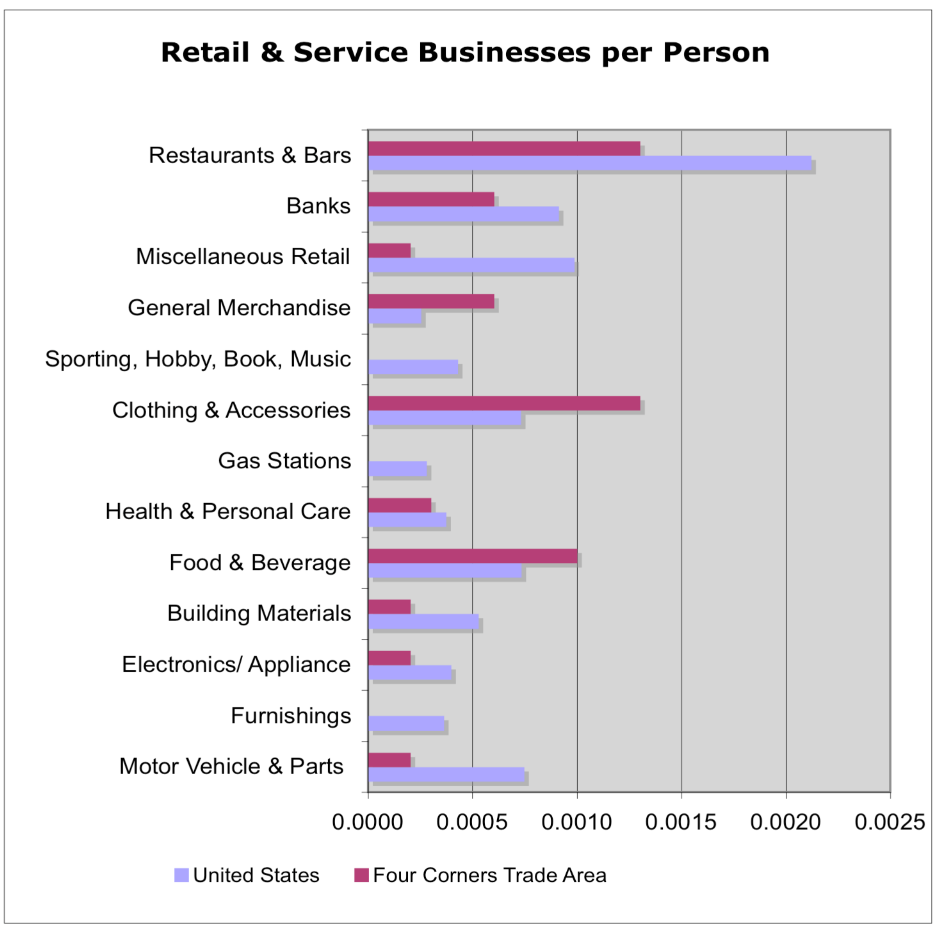
- General Merchandise
- Clothing & Accessories
- Food & Beverage

The PTA has close to the same number of business per person (within 20%) in the following categories:

- Health & Personal Care

*(*It should be noted that fewer gas stations and auto retailers coincides with the below average vehicle ownership rate in the area.)*

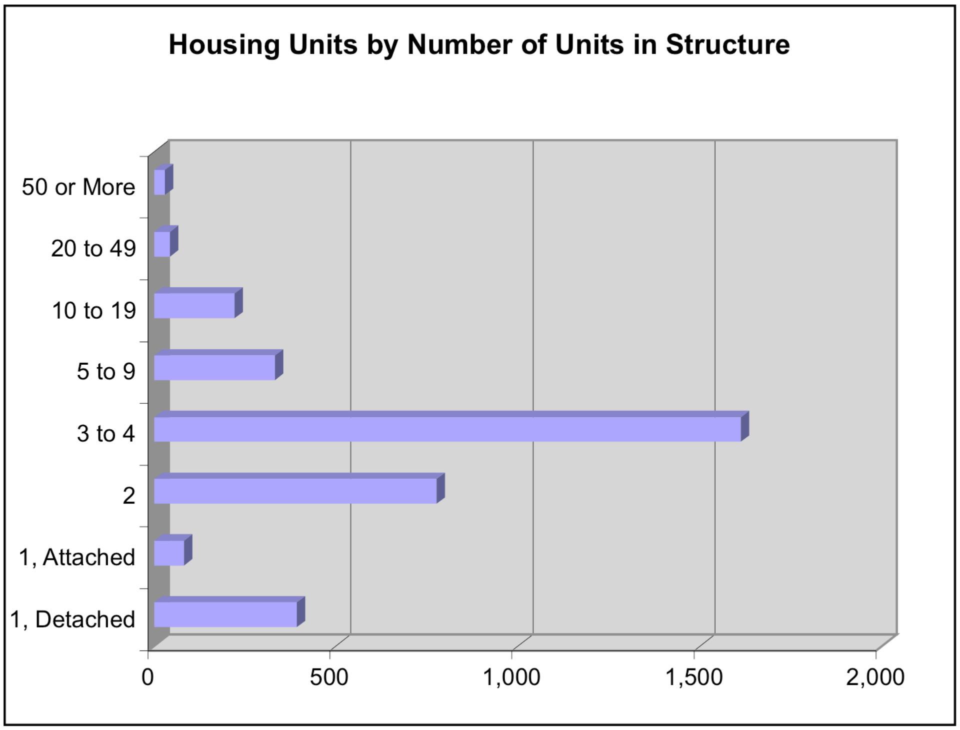
<u>Figure 8.</u>



C. Housing Characteristics

There are approximately 3,583 housing units in the primary trade area (ESRI forecast for 2008). Approximately 57% are renter-occupied, 33% are owner-occupied and10% are vacant. The housing stock is predominantly small multi-family buildings. 66% of the units are in buildings with a total of 2 to 4 units.

Figure 9.



Data Source: U.S. Census 2000

IV. Sales Leakage Analysis and Unmet Market Demand

A. Leakage Analysis

A leakage analysis estimates the amount and type of annual purchases that residents are currently making outside of the trade area. If the analysis shows significant leakage within certain retail categories, it points to possible opportunities for new development or expansion of existing businesses within those categories.

Table 11 shows the estimated sales of businesses located in the trade areas. Table 12 compares the estimated annual market demand in each category with the total sales of the businesses within the same trade area. The difference between what the residents spend and what the local businesses are capturing is called "leakage". This is also sometimes referred to as the retail/opportunity gap. The leakage indicates the amount of market demand that is not being captured – the amount of sales that are being lost because trade area residents are going outside of the trade area to make purchases.

For example. . . residents in the Primary Trade Area (PTA), spend an estimated $6.1 million per year at full service restaurants, but the businesses within the PTA are only capturing $1.7 million in sales, therefore the residents are spending at least $4.4 million at full service restaurants outside of the PTA.

The leakage amount is presented in two ways in the table. The dollar figure represents the volume of lost sales and the square foot number represents the estimated amount of commercial space that could be supported by those lost sales. Although large leakage amounts indicate potential opportunities, it should be noted that 100% capture is not expected. Given the mobility of the population and the variety of shopping options, consumers are likely to continue to purchase a portion of their goods and services outside the trade area (e.g., during shopping trips to regional malls, at businesses near where they work, or while traveling for pleasure and business).

When the leakage is presented as a negative number, this indicates a surplus. In these categories, the amount of current business sales exceeds the amount required to meet the market demand of trade area residents. In most cases, the likely explanation for negative leakage is that the businesses are drawing sales from non-resident market segments such as area employees, business-to-business sales, etc. and/or from customers beyond the identified trade area. In these categories, there is no evidence of unmet demand based on resident expenditures.

<u>Important Notes About Sales Leakage</u>
In addition to the businesses located in the Business District, there are numerous businesses located within the identified trade area. The trade area sales illustrated in the following table include all of the businesses in the trade area, not just those of the District businesses.

This analysis examines market demand of trade area residents only. The expenditures are resident expenditures only and do not include expenditures made by other market segments (i.e. employees that reside beyond the trade area, visitors, or sales made to businesses).

This analysis is based on the most current information available. Businesses could have moved into the area or left since these figures were compiled.

Table 11.

Estimated Trade Area Sales

	Primary Trade Area	.5 Mile Radius	1 Mile Radius
	$ Amount	$ Amount	$ Amount
Furniture & Home Furnishings Stores	$0	$7,251	$3,773,015
Furniture Stores	$0	$0	$2,580,229
Home Furnishings Stores	$0	$7,251	$1,192,786
Electronics & Appliance Stores	$2,014,425	$2,299,785	$4,220,959
Bldg Materials, Garden Equip.	$573,575	$538,986	$5,557,901
Building Material & Supplies	$573,575	$538,986	$5,557,901
Lawn and Garden Equip & Sup.	$0	$0	$0
Food & Beverage Stores	$5,805,324	$7,812,451	$49,663,234
Grocery Stores	$4,553,064	$4,914,541	$34,246,509
Specialty Food Stores	$186,601	$408,061	$1,784,150
Beer, Wine, and Liquor Stores	$1,065,659	$2,489,849	$13,632,575
Health & Personal Care Stores	$3,236,407	$6,131,749	$25,935,065
Clothing & Clothing Accessories	$8,966,992	$7,990,722	$26,623,515
Clothing Stores	$5,714,193	$4,506,429	$21,236,585
Shoe Stores	$2,137,833	$2,163,486	$2,992,967
Jewelry, Luggage, & Leather Gds	$1,114,966	$1,320,807	$2,393,963
Sporting Goods, Hobby, Book, Music	$47,838	$339,927	$1,931,744
Sporting Goods/Hobby/Music Instr.	$0	$35,992	$1,024,662
Book, Periodical, and Music Stores	$47,838	$303,935	$907,082
General Merchandise Stores	$2,528,223	$3,363,473	$21,012,133
Department Stores	$745,896	$842,566	$3,372,760
Other General Merchandise Stores	$1,782,327	$2,520,907	$17,639,373
Miscellaneous Store Retailers	$215,459	$339,114	$2,485,192
Florists	$0	$0	$114,030
Office Supplies, Stationery, and Gift	$215,459	$326,467	$891,355
Used Merchandise Stores	$0	$12,647	$170,254
Other Miscellaneous Retailers	$0	$0	$1,309,553
Food Services & Drinking Places	$11,895,909	$15,846,262	$60,367,901
Full-Service Restaurants	$1,728,369	$3,983,826	$25,039,676
Limited-Service Eating Places	$6,079,563	$7,257,562	$25,030,794
Special Food Services	$4,087,977	$4,087,977	$9,090,962
Drinking Places (Alcoholic Bev.)	$0	$516,897	$1,206,469
Total	$35,284,152	$44,669,720	$201,570,659

Source: InfoUSA® and ESRI

Table 12.

Sales Leakage Analysis

	Primary Trade Area		.5 Mile Radius		1 Mile Radius	
Business Type	$ Amount	Sq. Ft	$ Amount	Sq. Ft	$ Amount	Sq. Ft
Furniture Stores	1,214,764	4,401	2,203,939	7,985	5,103,615	18,491
Home Furnishings Stores	1,163,332	6,427	2,108,393	11,649	6,137,523	33,909
Electronics & Appliance	483,544	1,465	2,228,451	6,753	11,491,008	34,821
Bldg. Material & Supplies	1,035,705	4,543	2,406,441	10,555	4,408,310	19,335
Lawn & Garden Equip/Sup.	21,651	95	39,454	173	130,506	572
Grocery Stores	7,715,720	18,773	17,265,348	42,008	41,309,980	100,511
Specialty Food Stores	470,406	1,176	779,898	1,950	2,272,623	5,682
Beer, Wine, and Liquor	240,859	860	(124,437)	(444)	(5,602,881)	(20,010)
Health & Personal Care	106,764	260	(89,296)	(218)	(5,517,475)	(13,457)
Clothing Stores	(1,159,489)	(4,694)	3,727,225	15,090	6,878,120	27,847
Shoe Stores	(1,585,374)	(6,471)	(1,167,534)	(4,765)	406,746	1,660
Jewelry, Luggage, Leather	(678,216)	(1,995)	(527,345)	(1,551)	340,637	1,002
Sport Goods/Hobby/Mus. In	525,903	2,317	916,925	4,039	2,284,080	10,062
Book, Periodical, and Music	758,949	3,036	1,153,299	4,613	4,154,799	16,619
Department Stores	335,658	1,730	1,116,170	5,753	3,399,674	17,524
Other General Merchandise	1,671,582	9,833	3,724,294	21,908	3,670,155	21,589
Florists	210,919	796	384,389	1,451	1,155,742	4,361
Office Sup, Stationary, Gift	248,756	995	515,453	2,062	1,977,679	7,911
Used Merchandise Stores	40,040	200	59,789	299	80,159	401
Other Misc. Retailers *	610,766	2,443	1,104,520	4,418	2,446,020	9,784
Full-Service Restaurants	4,403,929	11,744	7,120,103	18,987	12,504,835	33,346
Limited-Service Restaurants	(2,766,844)	(7,378)	(1,259,972)	(3,360)	(4,714,296)	(12,571)
Drinking Places (Alcoholic)	644,712	2,185	652,735	2,213	2,712,785	9,196

** includes: pets & supplies, art dealers, tobacco*

B. Unmet Market Demand

The leakage analysis shows that, in many retail categories, the existing supply of businesses are not meeting the current market demand of trade area residents. In the primary trade area, there is approximately $22 million of sales leakage capable of supporting approximately 73,000 sq. ft. of commercial space. However, because this sales leakage is spread over many retail and restaurant categories, it is more useful to look at sales leakage by category and then compare the amount of leakage to the sales thresholds necessary to support new businesses. This analysis is provided in the next section. The specific retail categories with sales leakage are listed in Table 13 in order of descending leakage.

As previously stated, it is not expected that businesses within in a trade area would necessarily achieve 100% capture, much depends on the quality and proximity of available offerings beyond the trade area, however, the categories with large sales leakage represent market opportunities that should be further explored. Residents are currently traveling beyond the trade area to acquire these goods and services. It might be possible to capture those sales if comparable offerings could be developed within the trade area. The following table also illustrates the approximate amount of square footage that could be supported given various market capture scenarios. This information is useful as it indicates how large a portion of the market would have to be captured in order to support the square footage. Generally, a smaller required capture rate indicates greater market feasibility for a new outlet.

Table 13.
Summary of Unmet Market Demand

Primary Trade Area

	Unmet Demand/ Leakage			Additional Supportable S.F. Given Various Market Capture Scenarios			Most Signif.
Business Type	$ Amount	Square Feet		30%	60%	90%	
Grocery Stores	7,715,720	18,773		-2,123	6,833	15,788	
Full-Service Restaurants	4,403,929	11,744		297	5,203	10,109	*
Other General Merchandise Stores	1,671,582	9,833		-4,389	1,706	7,801	
Furniture Stores	1,214,764	4,401		1,320	2,641	3,961	
Home Furnishings Stores	1,163,332	6,427		1,928	3,856	5,785	
Building Material & Supplies	1,035,705	4,543		-398	1,719	3,837	
Book, Periodical, and Music Stores	758,949	3,036		777	1,745	2,713	
Drinking Places (Alcoholic Bev.)	644,712	2,185		656	1,311	1,967	
Other Miscellaneous Retailers	610,766	2,443		733	1,466	2,199	
Sporting Goods/Hobby/Music Instr.	525,903	2,317		695	1,390	2,085	
Electronics & Appliance Stores	483,544	1,465		-3,833	-1,563	708	
Specialty Food Stores	470,406	1,176		26	519	1,012	
Department Stores	335,658	1,730		-2,172	-500	1,173	
Office Supplies, Stationery, and Gift	248,756	995		-305	252	809	
Beer, Wine, and Liquor Stores	240,859	860		-2,406	-1,006	394	
Florists	210,919	796		239	478	716	
Health & Personal Care Stores	106,764	260		-5,447	-3,001	-555	
Used Merchandise Stores	40,040	200		60	120	180	
Lawn and Garden Equip & Sup.	21,651	95		28	57	85	
Total	21,903,959	73,280					

.5 Mile Radius

	Unmet Demand/ Leakage			Additional Supportable S.F. Given Various Market Capture Scenarios			Most Signif.
Business Type	$ Amount	Square Feet		30%	60%	90%	
Grocery Stores	17,265,348	42,008		4,232	20,422	36,612	
Full-Service Restaurants	7,120,103	18,987		-1,740	7,143	16,026	*
Clothing Stores	3,727,225	15,090		-8,244	1,756	11,757	
Other General Merchandise Stores	3,724,294	21,908		-3,808	7,213	18,234	*
Building Material & Supplies	2,406,441	10,555		1,512	5,387	9,263	
Electronics & Appliance Stores	2,228,451	6,753		-2,852	1,264	5,381	
Furniture Stores	2,203,939	7,985		2,396	4,791	7,187	
Home Furnishings Stores	2,108,393	11,649		3,467	6,973	10,480	*
Book, Periodical, and Music Stores	1,153,299	4,613		533	2,282	4,030	
Department Stores	1,116,170	5,753		-1,314	1,715	4,744	
Sporting Goods/Hobby/Music Instr.	916,925	4,039		1,101	2,360	3,620	
Specialty Food Stores	779,898	1,950		-129	762	1,653	

Drinking Places (Alcoholic Bev.)	652,735	2,213		-563	627	1,816	
Office Supplies, Stationery, and Gift	515,453	2,062		-296	715	1,725	
Florists	384,389	1,451		435	870	1,305	
Used Merchandise Stores	59,789	299		45	154	263	
Lawn and Garden Equip & Sup.	39,454	173		52	104	156	
Total	47,506,826	161,905					

1 Mile Radius

	Unmet Demand/ Leakage			**Additional Supportable S.F. Given Various Market Capture Scenarios**			**Most Signif.**
Business Type	$ Amount	Square Feet		**30%**	**60%**	**90%**	
Grocery Stores	41,309,980	100,511		-28,174	26,977	82,127	*?
Full-Service Restaurants	12,504,835	33,346		-36,737	-6,701	23,334	
Electronics & Appliance Stores	11,491,008	34,821		1,493	15,776	30,060	*
Clothing Stores	6,878,120	27,847		-51,831	-17,683	16,464	
Home Furnishings Stores	6,137,523	33,909		5,560	17,709	29,859	*
Furniture Stores	5,103,615	18,491		-997	7,355	15,707	*
Building Material & Supplies	4,408,310	19,335		-11,263	1,850	14,964	
Book, Periodical, and Music Stores	4,154,799	16,619		2,446	8,520	14,594	*
Other General Merchandise Stores	3,670,155	21,589		-66,156	-28,551	9,054	
Department Stores	3,399,674	17,524		-6,913	3,560	14,033	
Drinking Places (Alcoholic Bev.)	2,712,785	9,196		-104	3,882	7,867	*
Other Miscellaneous Retailers	2,446,020	9,784		-732	3,775	8,282	
Sporting Goods/Hobby/Music Instr.	2,284,080	10,062		-141	4,232	8,604	*
Specialty Food Stores	2,272,623	5,682		-1,418	1,625	4,667	*
Office Supplies, Stationery, and Gift	1,977,679	7,911		-123	3,320	6,763	
Florists	1,155,742	4,361		1,007	2,445	3,882	
Shoe Stores	406,746	1,660		-8,053	-3,890	273	
Jewelry, Luggage, & Leather Gds	340,637	1,002		-4,628	-2,215	198	
Lawn and Garden Equip & Sup.	130,506	572		172	343	515	
Used Merchandise Stores	80,159	401		-476	-100	276	
Total	112,864,996	374,623					

Summary of Market Opportunity Indicated by Leakage Analysis

There is sales leakage in all of the categories listed in the previous table. The categories with the most significant leakage are indicated with an asterisk. For the purposes of this analysis, "most significant leakage" is defined as a leakage amount sufficient to support a new business (given typical store size) under a 60% capture rate scenario for the category. In other words, even with 40% sales leakage in the category, there would still be enough market support for a new store.

In the **primary trade area,** there is only one category in which the leakage meets the threshold of "most significant leakage" and that is:

- Full-Service Restaurants

In the **.5 mile trade area**, the most significant leakage is in the following categories:

- Full-Service Restaurants[1]
- Other Gen. Merchandise Stores
- Home Furnishings Stores

In the **1 mile trade area**, the most significant leakage is in the following categories:

- Grocery Stores[3]
- Electronics & Appliance Stores
- Home Furnishings Stores
- Furniture Stores
- Book, Periodical, Music Stores [2]
- Drinking Places (Alcoholic Bev.)
- Sport Goods/Hobby/Music Instr.
- Specialty Food Stores

Notes About Specific Categories

1. *It should be noted that full service restaurants often want to locate near other restaurants and businesses that are open in the evening.*

2. *Due to the significant increase in book purchasing over the Internet coupled with the existence of very large retailers such as Barnes & Noble, there has been a significant decrease in small independent bookstores.*

3. *Market capture of 60% would support a small grocery store.* A capture rate of 80-90% would be required to support large supermarket

Important Note About Opportunities Based on Sales Leakage
These results only indicate that there is sales leakage in these categories. To determine the feasibility of capturing this leakage, it is necessary to evaluate the strength of the competing businesses outside of the trade area that are currently attracting these sales (which is beyond the scope of this analysis). If it can be determined that is possible to locate businesses in the business district that offer comparable merchandise, service, pricing and convenience (compared with what consumers are now traveling further to obtain) it is likely that there is market potential for new outlets in the category.

The following table illustrates the approximate typical store sizes for the categories that show most significant sales leakage in the primary trade area. Note that store size can vary depending on the specific type of business and operating format.

Table 14.

Typical Store Size for Categories with Greatest Sales Leakage (in primary trade area)

Categories with Most Significant Sales Leakage	Typical Store Size (sq. ft.)
Full-Service Restaurants	3,000 full service independent; 3,500 full service local chain, 7,000 – 9,000 national chain

The other categories that show more modest amounts of leakage may also offer opportunities, but it would require an aggressive market capture scenario to support a new outlet. Or, if the opportunity does not rise to the threshold of supporting a new outlet, it may indicate potential for an expansion of offerings in existing businesses.

In the categories that show very little or no leakage, the market opportunity for new businesses would depend on their ability to:

- attract customers from beyond the trade area,
- attract expenditures from non-residential market segments (e.g., students, visitors, employees, business-to-business);
- offer higher quality, better priced or otherwise, more desirable product or service and therefore overtake/replace less desirable current businesses

For example, in Four Corners, there might be additional opportunity for new businesses that would complement Mod Boston such as other retail or services that target the same young urban consumer segment. The success of any new potential new business would depend on its ability to draw customers from well beyond the primary trade area as Mod Boston does.

Another strategy to consider for categories with no significant leakage is to encourage businesses that are currently located inside the trade area but outside of business district to relocate within the district. This sometimes can improve the mix of businesses but not require additional market capture.

C. Non Resident Market Segment -- Employees of Surrounding Businesses

In addition to residents, there are many employees that work within close proximity to the business district. There are 268 businesses with 1,589 employees within the primary trade area. This represents a market opportunity for breakfast and lunchtime meal purchases as well as other convenience goods and services purchased before and after work. This number of employees represents approximately $1.6 million of potential spending each year on breakfast and lunch, capable of supporting around 4,000 s.f. of restaurant space. However, this most likely does not represent an opportunity for <u>new</u> restaurants as the sales of existing limited service restaurants exceeds resident demand by $2.7 million, indicating that the restaurants are likely already capturing a large portion of the employee market segment. (The over-supply of limited service restaurants might also indicate that, in the absence of full service restaurants, residents might be making a greater portion of their restaurant purchases at limited-service restaurants.)

D. Business Opportunity Assessment

The following chart provides an evaluation of new business opportunities based on current sales leakage and under-representation.

Table 15.

<table>
<tr><th colspan="7">Business Opportunity Assessment</th></tr>
<tr><th rowspan="2"></th><th colspan="3">Most Significant Sales Leakage[1]</th><th colspan="2">Under-Represented in the District by Comparison</th><th rowspan="2">Under-Represented in PTA[2] Compared to National Average
(# of businesses per person)</th></tr>
<tr><th>Primary Trade Area</th><th>.5-Mile Radius</th><th>1-Mile Radius</th><th>Selected Boston Business Districts</th><th>U.S. Shopping Centers</th></tr>
<tr><td>Furniture Stores</td><td></td><td></td><td>*</td><td rowspan="2">Y</td><td rowspan="2">Y</td><td rowspan="2">Y</td></tr>
<tr><td>Home Furnishings Stores</td><td></td><td>*</td><td>*</td></tr>
<tr><td>Electronics & Appliance</td><td></td><td></td><td>*</td><td>N</td><td>N</td><td>Y</td></tr>
<tr><td>Bldg. Material & Supplies</td><td></td><td></td><td></td><td rowspan="2">N</td><td rowspan="2">Y</td><td rowspan="2">Y</td></tr>
<tr><td>Lawn & Garden Equip/Sup.</td><td></td><td></td><td></td></tr>
<tr><td>Grocery Stores</td><td></td><td></td><td>*[3]</td><td rowspan="2">N</td><td rowspan="2">Y</td><td rowspan="3">N</td></tr>
<tr><td>Specialty Food Stores</td><td></td><td></td><td>*</td></tr>
<tr><td>Beer, Wine, and Liquor</td><td></td><td></td><td></td><td>Y</td><td>Y</td></tr>
<tr><td>Health & Personal Care</td><td></td><td></td><td></td><td>Y</td><td>Y</td><td>Y</td></tr>
<tr><td>Clothing Stores</td><td></td><td></td><td></td><td>N</td><td>N</td><td rowspan="3">N</td></tr>
<tr><td>Shoe Stores</td><td></td><td></td><td></td><td>Y</td><td>Y</td></tr>
<tr><td>Jewelry, Luggage, Leather</td><td></td><td></td><td></td><td>N</td><td>Y</td></tr>
<tr><td>Sport Goods/Hobby/Mus. Inst</td><td></td><td></td><td>*</td><td rowspan="2">N</td><td rowspan="2">Y</td><td rowspan="2">Y</td></tr>
<tr><td>Book, Periodical, and Music</td><td></td><td></td><td></td></tr>
<tr><td>Department Stores</td><td></td><td></td><td></td><td rowspan="2">Y</td><td rowspan="2">Y</td><td rowspan="2">Y</td></tr>
<tr><td>Other General Merchandise</td><td></td><td>*</td><td></td></tr>
<tr><td>Florists</td><td></td><td></td><td></td><td rowspan="4">Y</td><td rowspan="4">Y</td><td rowspan="4">N</td></tr>
<tr><td>Office Sup, Stationary, Gift</td><td></td><td></td><td></td></tr>
<tr><td>Used Merchandise Stores</td><td></td><td></td><td></td></tr>
<tr><td>Other Misc. Retailers</td><td></td><td></td><td></td></tr>
<tr><td>Full-Service Restaurants</td><td>*</td><td>*</td><td></td><td rowspan="3">Y</td><td rowspan="3">N</td><td rowspan="3">Y</td></tr>
<tr><td>Limited-Service Restaurants</td><td></td><td></td><td></td></tr>
<tr><td>Drinking Places (Alcoholic)</td><td></td><td></td><td>*</td></tr>
<tr><td>Financial/Insur./Real Estate</td><td>NA</td><td>NA</td><td>NA</td><td>Y</td><td>N</td><td>Y</td></tr>
<tr><td>Other Offices/Prof. Services</td><td>NA</td><td>NA</td><td>NA</td><td>Y</td><td>Y</td><td>NA</td></tr>
</table>

1. Leakage amount sufficient to support a new business (typical store size) under a 60% capture rate scenario
2. *PTA = Primary Trade Area*
3. *60% capture rate would support small grocery not a large supermarket.*

Appendix A

Mid Dorchester Business Districts *(Source: Boston Redevelopment Authority)*


Mid-Dorchester
Action Plan
Business District
Bowdoin/Geneva
Main Streets District
Four Corners
Main Streets
District
Codman Square
Business District
Proposed
Four Corners/Bowdoin
Station
Proposed
Talbot Avenue/
Codman Square
Station
MBTA Fairmount CR Line
MBTA Red Line
Fields Corner
Shawmut
Ashmont
Franklin Park
Ceylon Park
Columbia Road Mall
Ronan Park
Allen Park
Harambee Park
St. Mary's Cemetery
Codman Burying Ground
Roberts Playground
Dorchester Park
0 250 500 750 1,000 Feet