

APPENDIX B / Retail Market Analysis

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Potential City-Owned Site for Retail Development



Comparable Neighborhood Profiles

South End, Springfield Neighborhood Retail

Looks like

The South End retail district is roughly 17 blocks long beginning on State Street going eastward to Mill Street.

The South End retail district has a very traditional “downtown” feel with large, turn of the century block buildings located near State Street, turning into smaller three and four story brick buildings with office above and then changing into one story, car-oriented retail nearer Mill Street.

Restaurant		Health		Community	
Asian	2	Caring Health Center	1	Sherriff's Office	1
Hispanic	1	Injury Rehab Center	1	School/Day Care	1
American	2	Chiropractor	1	MBL Housing & Development	1
Fast Food Chain	2	South End Medical Building	1	Library	0
Pub/Bar	3	Total	4	South End Citizens Council	1
Pizza				Ethnic Club	0
Italian	1	Specialty		Total	4
Café	3	Clothing	4	Churches	
Total	14	Shoes		Storefront	1
Services		Electronics/Cell Phone	3	Traditional	
Laundromat/Dry Cleaning	1	Carpeting/Rugs		Total	1
Hair/Nail Salon	8	Furniture	2	Post Office	1
Barber	2	Jewelry	1	Professional Office Use	
Bank	2	Gift Shop	2	Attorneys	2
Financial/Taxes/Mortgages	4	Florist	1	Professional Office	2
Insurance	4	Discount Store	2	Architect	1
Real Estate	1	Liquor	2	Design	1
Shoe Repair	1	Tailoring	2	Engineering	1
Travel Agency	1	Appliances	2	Accountants	1
Total	24	Tattoo	1	Apartment Management	2
Markets/Grocery		Bakery	1	Total	10
Asian	1	Pawn Shop		Miscellaneous	
Hispanic	1	Athletic Supplies	1	Bottle Can Return	1
Italian	2	Office Suppliers	2	Power Tools & Repair	1
Market/Tedeschi's	2	Total	26	Funeral Home	2
Seafood	1	Convenience Store	1	Gas Station	2
Total	7	Automotive		Total	6
Park	1	Auto Parts			
Vacant Storefront	11	Auto Sales	3		
Vacant Building/Lot	3	Total	3		

Appendix: Figure 2b

Vacancy

There were 11 empty storefronts in the 17 block stretch of Main Street and 3 empty buildings.



Housing

The area is primarily surrounded by rental housing in single detached homes broken up for apartments. A former mill building, Stockbridge Court, has also been converted to apartments and sits back a block from Main Street at Cross Street. Stockbridge Court provides market rate housing in a meticulously landscaped and cared for environment. Traditional four story brick apartment buildings built in the late teens and early 20s are also located to the west of Main Street and clustered in the Niagara-Saratoga-Oswego-Bayonne area off of Main Street. From Central Street to Rutledge Street, the housing is a deteriorated state.

Retail Characteristics

Retail buildings in this area are mixed. There are one story block buildings of the 1930s vintage, newer one-story cement block buildings of the non-descript vintage, and rehabilitated turn of the century block buildings. There are stand alone chain stores like Dunkin Donuts, McDonalds, and LaundroMax, starting at Central Street and going eastward towards Mill Street.

Demographics

According to the US Census data for 2006, the population of the South End section of Springfield was 4,445 people.

50.2%	White
18%	African American
.7%	Asian
27%	Hispanic (Other)

Income

The median household income for 2006 was \$21,161.

Appendix: Figure 2b

Chelsea Neighborhood Retail

Looks like

The Chelsea retail district, located on Broadway Street between Park Street and Gerrish Avenue is roughly 10 blocks long.

The district is easily accessed by public transportation by either commuter rail to North Station and several buses that deliver riders to either the Haymarket/Green Line T Station or the Maverick/Blue Line T Station.

The Chelsea retail district has a very traditional “downtown” feel with large, turn of the century block buildings interspersed with smaller, one-story concrete block shops and 1930s style one-story storefronts.

Retail Mix

Restaurant		Health		Community	
Asian	3	Pharmacy	1	YMCA	1
Hispanic	9	Dentist	3	Centro Latino de Chelsea	1
American	1	Optometrist	1	Consilio Hispano Inc.	1
Fast Food Chain	3	Total	5	Chamber of Commerce	1
Pub/Bar	1			Bunker Hill Community Coll.	1
Pizza	2	Specialty		City Hall	1
Total	19	Clothing	3	Employment Center	1
Services		Shoes	1	Juvenile Justice Office	1
Laundromat/Dry Cleaning	3	Electronics/Cell Phone	8	School/Day Care	1
Hair/Nail Salon	12	Carpeting/Rugs	1	Police Station	1
Barber	3	Furniture	1	Library	1
Law Offices	2	Jewelry	3	Neighborhood Housing	1
Check Cashing	2	Gift Shop	5	Ethnic Club	1
Bank	3	Discount Store	10	Total	13
Financial/H&R Block	3	Liquor	3	Churches	
Insurance	1	Tailoring	1	Storefront	1
Real Estate	2	Restaurant Equipment	1	Traditional	1
Copying/Printing	1	Tattoo	1	Total	2
Western Union/Cash		Bakery	1		
Transferring	3	Pawn Shop	1	Post Office	1
Travel Agency	2	Total	40	Vacant Storefront	8
Total	37			Park	3
Markets/Grocery		Convenience Store	5		
Asian	1	Automotive			
Hispanic	2	Auto Parts	1		
Middle Eastern	1				
Market	3				
Grocery Store	1				
Total	8				

Appendix: Figure 2b

Vacancy

There were a only handful of vacant storefronts. Vacancy does not appear to be a problem in this district.



Housing

The area is primarily surrounded by rental housing in brick apartment buildings. Some single family homes have also been broken up into apartments. Apartments located above the ground floor retail are very prevalent here.

Retail Characteristics

Retail buildings in this area are mixed. There are one story block buildings of the 1930s vintage, newer one-story block buildings of the non-descript vintage, modern 1950s and 60s one-story buildings and rehabilitated turn of the century block buildings. A new brick building is being built next to the Post Office. There are few stand alone chain stores like 7-11, which is located on the perimeter of the district, near Park Street at Williams Street.

Dunkin Donuts, McDonalds and Store 24 have each been well-located in traditional retail space called the DeDomenico Building, they are not typical drive-through retailers.

Demographics

According to the US Census of 2000, the population of the City of Chelsea was 35,080 people.

57.95%	White
7.25%	African American
4.69%	Asian
48.42%	Hispanic

Income

The median household income was \$30,161.

Appendix: Figure 2b

Codman Square Neighborhood Retail

Looks like

The Codman Square retail district, located on Washington Street between Park Street and Rockwell Street in Dorchester is roughly 14 blocks long and is an official Main Streets district.

Apartment buildings, large single-family houses, churches and parks are interspersed along the retail corridor.

Retail Mix		
Restaurant		
Asian	1	
Hispanic	1	
American Diner	1	
Jamaican	1	
American	1	
Fast Food Chain	3	
Deli	2	
Total	10	
Services		
Laundromat/Dry Cleaning	3	
Hair/Nail Salon	8	
Beauty Supply	1	
Tanning	1	
Wig Shop	1	
Barber	3	
Law Offices	2	
Auto School	1	
Check Cashing	1	
Bank	2	
Financial/H&R Block	1	
Insurance	2	
Real Estate	2	
Total	28	
Health		
Physical Therapy	1	
Pharmacy	1	
Health Institution	2	
Total	4	
	Specialty	
	Clothing	7
	Shoes	2
	Electronics/Cell Phone	3
	Photo Studio	1
	Furniture	1
	Jewelry	1
	Total	15
	Community	
	YMCA	1
	Codman Sq CDC	1
	Health Center	1
	Senior Center	1
	Chiropractor	1
	Employment Center	1
	Courthouse	1
	School/Day Care	2
	The Great Hall	1
	Library	1
	Total	11
	Churches	
	Storefront	3
	Traditional	3
	Religious Instruction	1
	Total	7
	Markets/Grocery	
	Fish	1
	Hispanic	3
	Grocery Store	1
	Total	4
	Convenience Store	
	Convenience Store	6
	Total	
	Automotive	
	Auto Repair	1
	Total	2
	Post Office	1
	Vacant Lot	1
	Vacant Storefront	5
	Parking Lot	1
	Park	1
	Gas Station	1

Appendix: Figure 2b

Vacancy

There were only a handful of vacant storefronts (10%). Vacancy does not appear to be a problem in this district.



Housing

The area is primarily surrounded by rental housing in either triple-decker style houses or mid-sized brick apartment buildings. Some single family homes have also been broken up into apartments. Apartments located above ground floor retail are not prevalent here.

Some of the more grand homes, primarily located along Melville Avenue, have been bought and restored by individual owners.

Retail Characteristics

Retail buildings in this area are primarily one story block buildings of the 1930s vintage. There is a few newly constructed brick building housing ground floor retail and health institution offices above. There is also a newly constructed health center. There are a few stand alone chain stores like McDonalds, Kentucky Fried Chicken and Walgreens.

Demographics

According to the Codman Square Neighborhood Corporation, the population of the Codman Square neighborhood is one of the poorest in the City of Boston with the median income well below the 80% median for the City and SMSA. Using 2000 Census data for the neighborhood of South Dorchester, in which Codman Square is located, demographic breakdown follows:

32%	White
43%	African American
10%	Asian
10%	Hispanic

Income

The median household income is \$39,587.

Appendix: Figure 2b

South Main Avenue, Worcester Neighborhood Retail

Looks like

The Main South retail district can be broken into three distinct areas: the traditional retail area closest to downtown which is also a part of the Worcester Arts District; the Clark University area and the more modern, stand alone retail closest to the intersection of Mill and Cambridge Streets.

Apartment buildings, houses, churches and parks are interspersed along the retail corridor.

Retail Mix

Restaurant		Specialty		Markets	
Asian	6	Wedding	1	American	2
Hispanic	3	Clark U	1	Asian	2
American Diner	1	Music	1	Hispanic	1
Jamaican	1	Clothing	1	Total	5
Pizza	2	Specialty/New Age	1	Convenience Store	
American	3	Electronics	1	Variety Store/Lottery	3
Chain	3	Rent-a-Center	2	Convenience Store	1
Deli	1	Total	8	Total	4
Café	1	Funeral Home	2	Automotive	
Pub/Bar	1	Community		Auto Repair	1
Total	22	YMCA	1	Used Auto Sales	1
Services		Main South CDC	1	Total	2
Laundromat	1	Health Center	1	Liquor Store	3
Florist	1	Total	3	Post Office	1
Hair/Nail Salon	6	Churches			
Tanning	1	Storefront	3		
Barber	1	Traditional	6		
Bakery	1	Total	9		
Travel	1				
Insurance	1				
Total	13				

Vacancy

The vacant storefronts were clustered in the area closest to downtown, from Madison Street to Hermon Street. Vacancies were limited to traditional department style retail stores. In particular, the former “Caravan” at Main and Madison Street.

Appendix: Figure 2b



Housing

The area is primarily surrounded by rental housing. Many of the apartments are in large Queen Anne style houses that have been broken up and triple-decker style buildings. The area also has some apartment buildings. There are also apartments located over storefronts along Main Street, but this type is in the minority.

Many of the Queen Anne houses have also been bought and restored by Clark University, which is using the buildings as administrative office space.

Retail Characteristics

Retail buildings in this area are of three types – the majority are one story block buildings, ground floor retail located in three or four story brick buildings with apartments over the retail, and a few stand alone chains like McDonalds and Store 24. There is one small strip mall located near the intersection of Park and Main.

Again, buildings closest to downtown are larger. There is a former department store at Madison and Main Street called the Caravan. It is vacant. There is more vacancy overall in these few blocks. There are also a few used car lots.

Demographics

The population of the Main South neighborhood breaks down into the follow ethnicities:

44%	White
23%	Hispanic (Puerto Rican)
11.5%	Asian
8%	Black
14%	Other or Mixed Race

Income

A 33.6% of families live below the poverty line.

50.5% of all families are headed by a female householder with no husband present.

Appendix: Figure 2b

Frog Hollow Neighborhood Retail Hartford CT

Looks like

The Frog Hollow retail district runs along Park Street in the Frog Hollow neighborhood from Park Terrace to Washington Street, an area nine blocks long. Park Street essentially bisects the neighborhood of Frog Hollow. Located just outside of downtown Hartford, there are several major institutions that surround, but are not located within, the neighborhood such as Trinity College, the Greater Hartford Academy of Arts, Hartford Hospital and Children's Hospital.

Apartments are located in large part above the retail stores in brick block buildings. A few houses converted to apartments and churches are also interspersed along the retail corridor.

Retail Mix

Restaurant		Health		Community	
Asian	3	Pharmacy	0	Library	1
Hispanic	6	Dentist	0	Community Development Corp.	
American	5	Optometrist	0	Mi Casa Community Ctr	1
Fast Food Chain	1	Total	0	Hartford Health Dept. WIC Ctr	1
Pub/Bar	2			Fire Station	1
Pizza	1	Specialty		Total	
Total	18	Clothing	5	Churches	
Services		Shoes	1	Storefront	0
Laundromat/Dry Cleaning	1	Electronics/Cell Phone	2	Traditional	3
Hair/Nail Salon	4	Music	1	Total	
Barber	5	Musical Instruments	1	Post Office	0
Check Cashing	3	Furniture	2	Vacant Storefront	7
Bank	2	Jewelry	6	Vacant Lot	2
Financial/H&R Block	3	Discount Store	6	Park	0
Western Union/Cash		Liquor	2	Automotive	
Transferring	1	Tattoo	1	Auto Shop	1
Hardware/Lock	2	Bakery	1	Auto Parts	1
Travel Agency	3	Bridal/Baby Showers	1	Total	2
Total	24	Florist	1		
Markets/Grocery		Appliances	1		
Hispanic	5	Driving School	1		
Market	2	Small Food Warehouse	1		
Total	7	Total	33		
		Convenience Store	1		

Vacancy

There were only a handful of vacant storefronts and fewer vacant lots. It appears that what may have been vacant lots in the past are now nicely paved and fenced parking lots for the retail district. There were four small parking lots located on Park Street.

Appendix: Figure 2b



Housing

The area is primarily surrounded by rental housing in both wood frame triple deckers and three story brick row houses. Single-family homes have also been converted to rental apartments and are concentrated in the area north of Park Street.

According to the 2000 Census, 7.3% of the housing is owner-occupied. 92.7% is renter occupied and 46.25 of the renters are paying 30% or less of their income on housing.

Retail Characteristics

Retail buildings in this area are primarily brick block buildings with apartments over the ground floor retail. There are a few newer 1930s style one story retail spaces but they are not in the majority.

New sidewalks, street lighting, signage and crosswalks are in evidence here. Sidewalks and crosswalks are constructed with grey pavers, the lights have an historic look and green patina color, and there are granite curbs and curb cuts.

There is also evidence of façade work like cleaned brick, new store awnings and new windows in many of the buildings. On one vacant building, brilliant murals have been painted to offset the effect of what could be an eyesore.

Despite the movement in a positive direction, the streets were dirty with litter which may be the result of a recent snow thaw.

Demographics

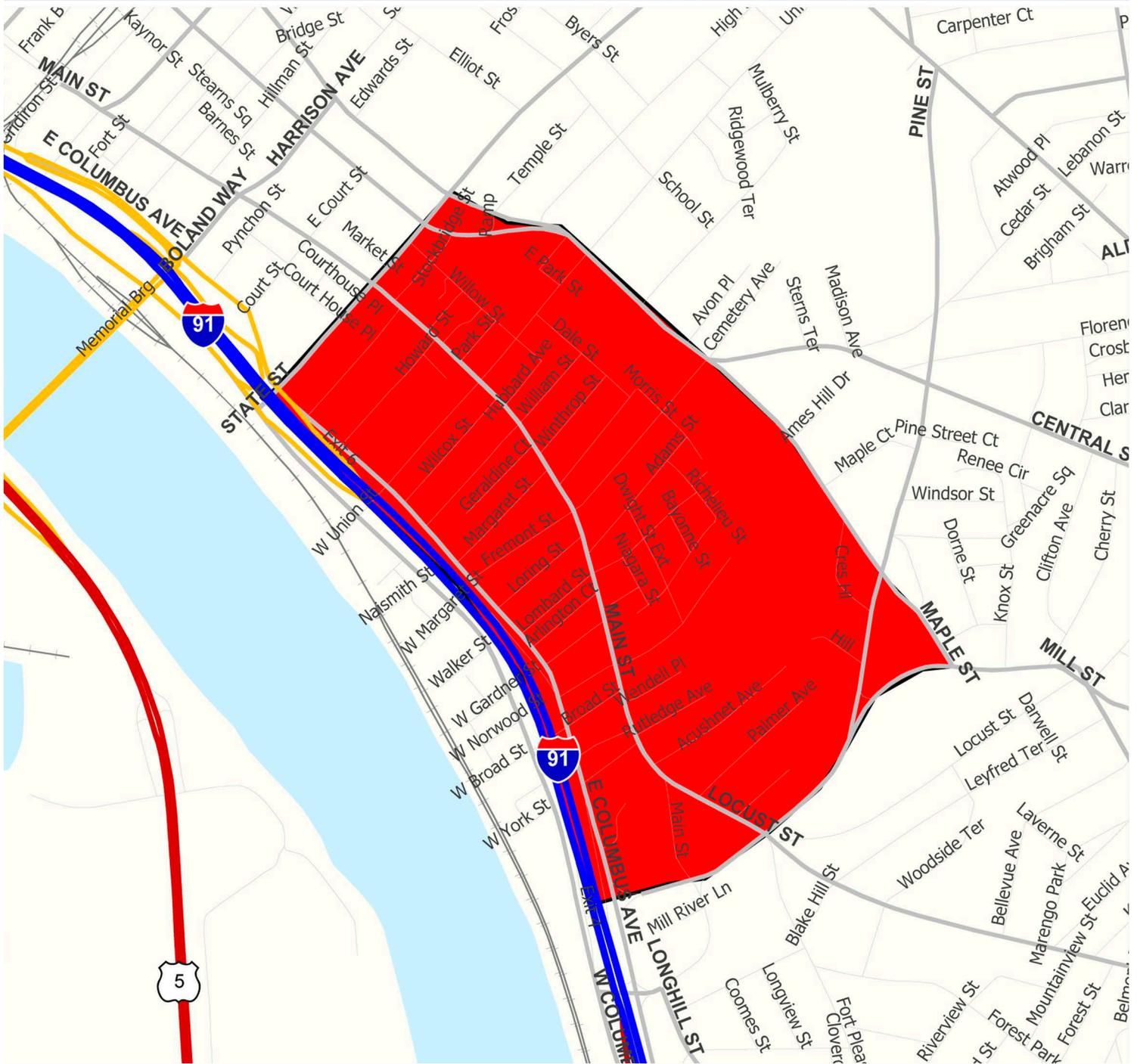
The total population of the Frog Hollow neighborhood is 9,323 in the 2000 Census. It breaks down into the following ethnicities:

10.9%	White
71.5%	Hispanic
1.4%	Asian
13.1%	Black

Income

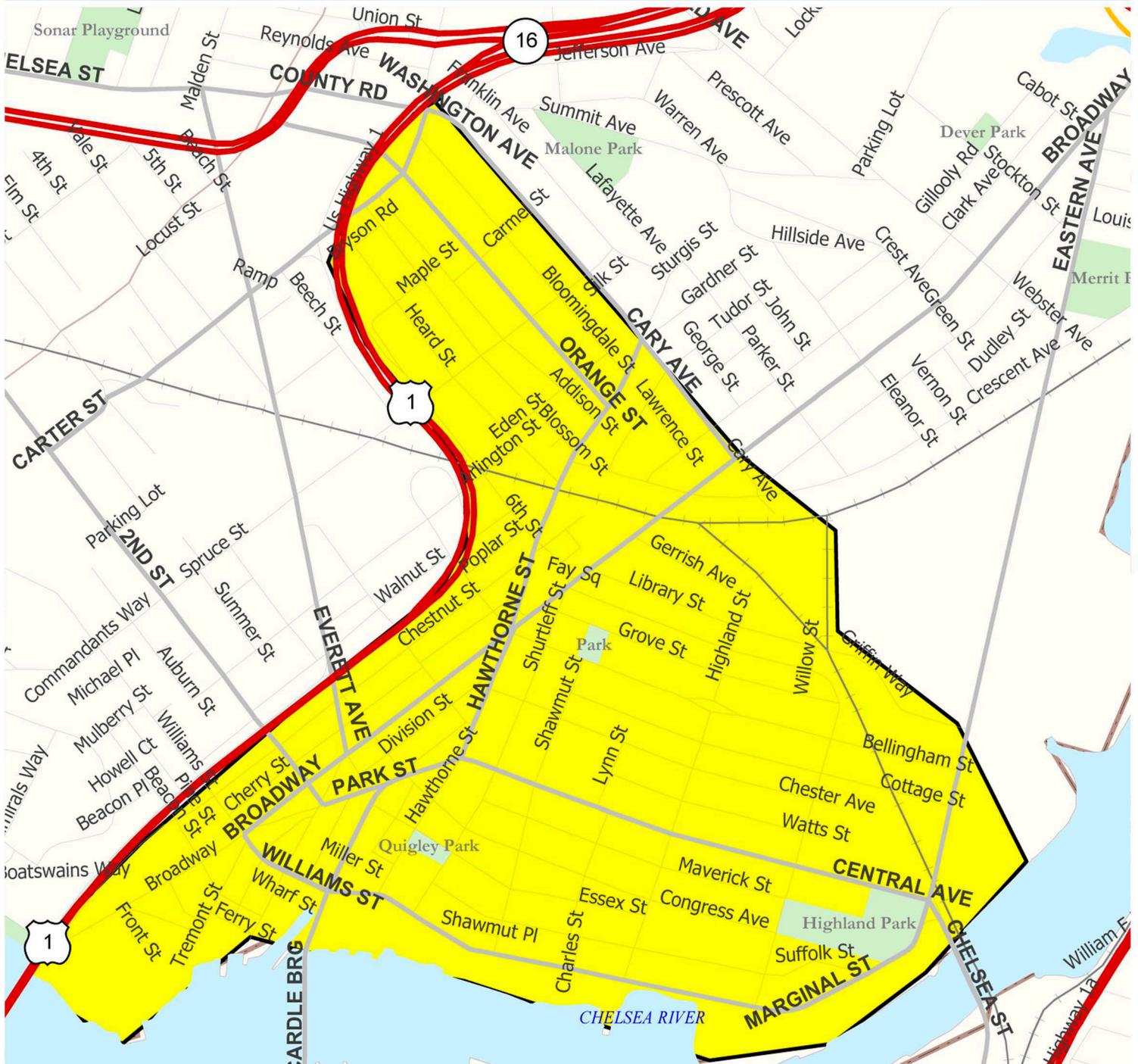
The median household income is \$17,333. 44.8% of the neighborhood population lives in poverty.

APPENDIX: Figure 3b **South End, Springfield, MA**



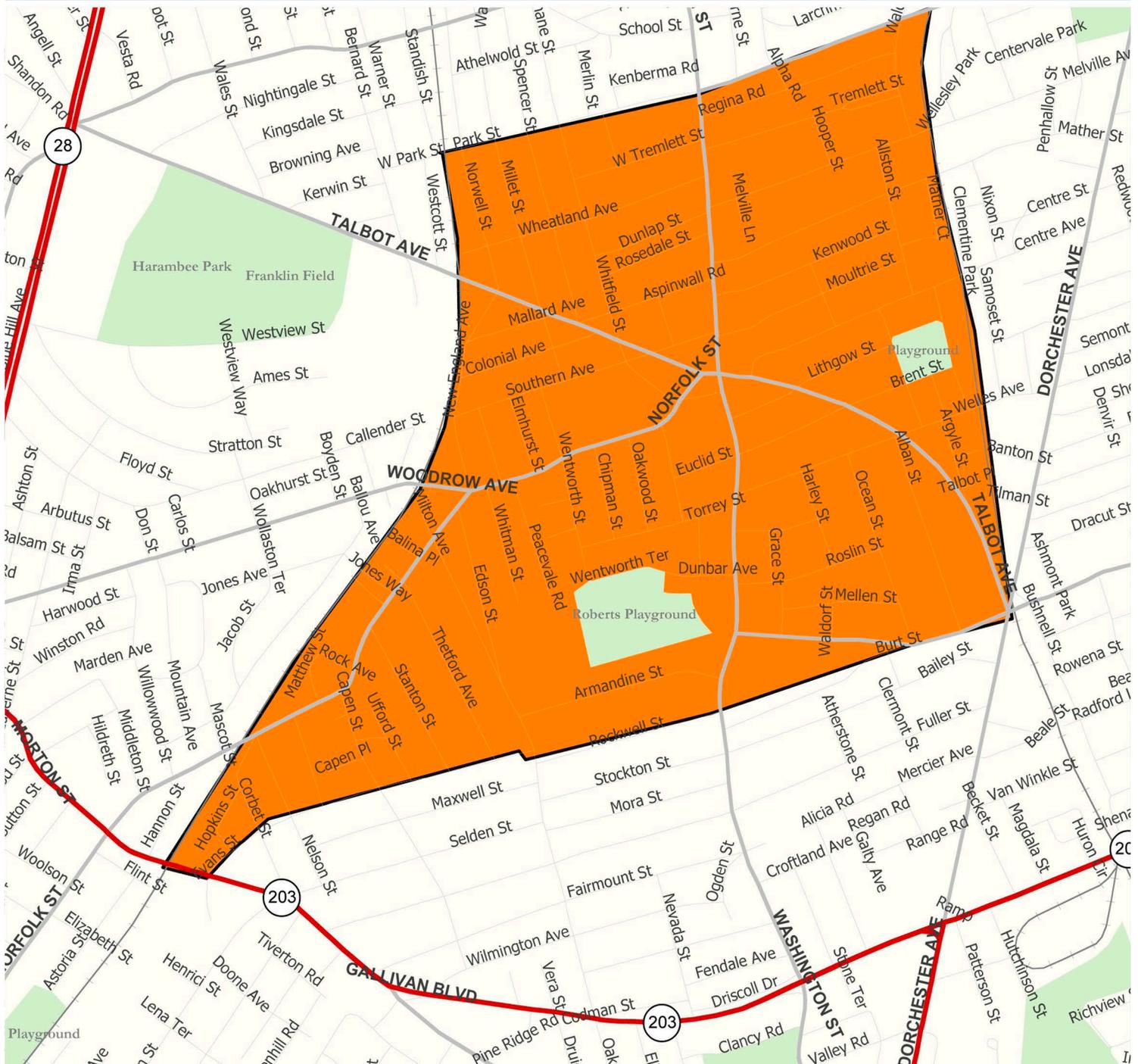
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Chelsea, MA



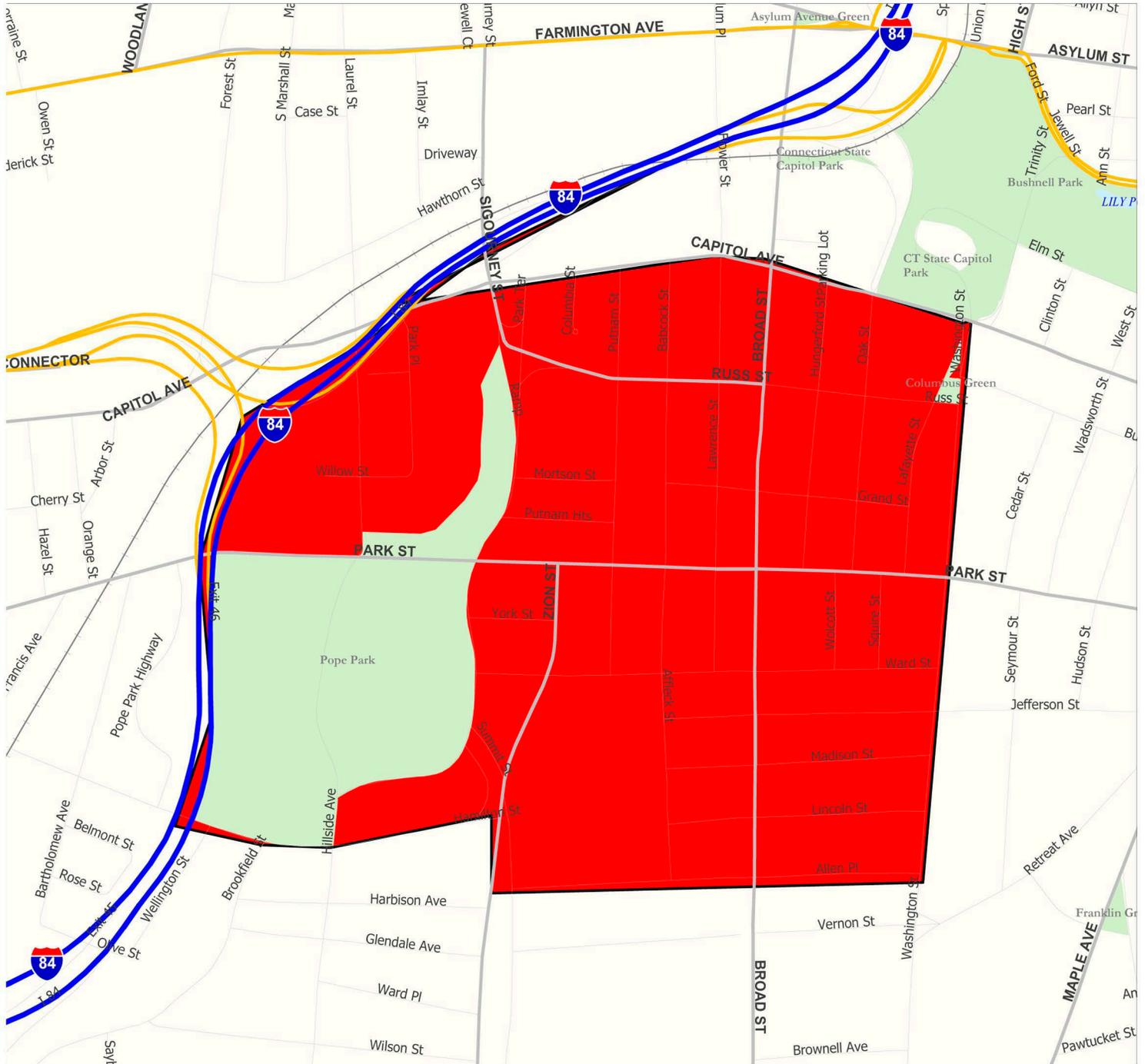
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Codman Square, Boston, MA



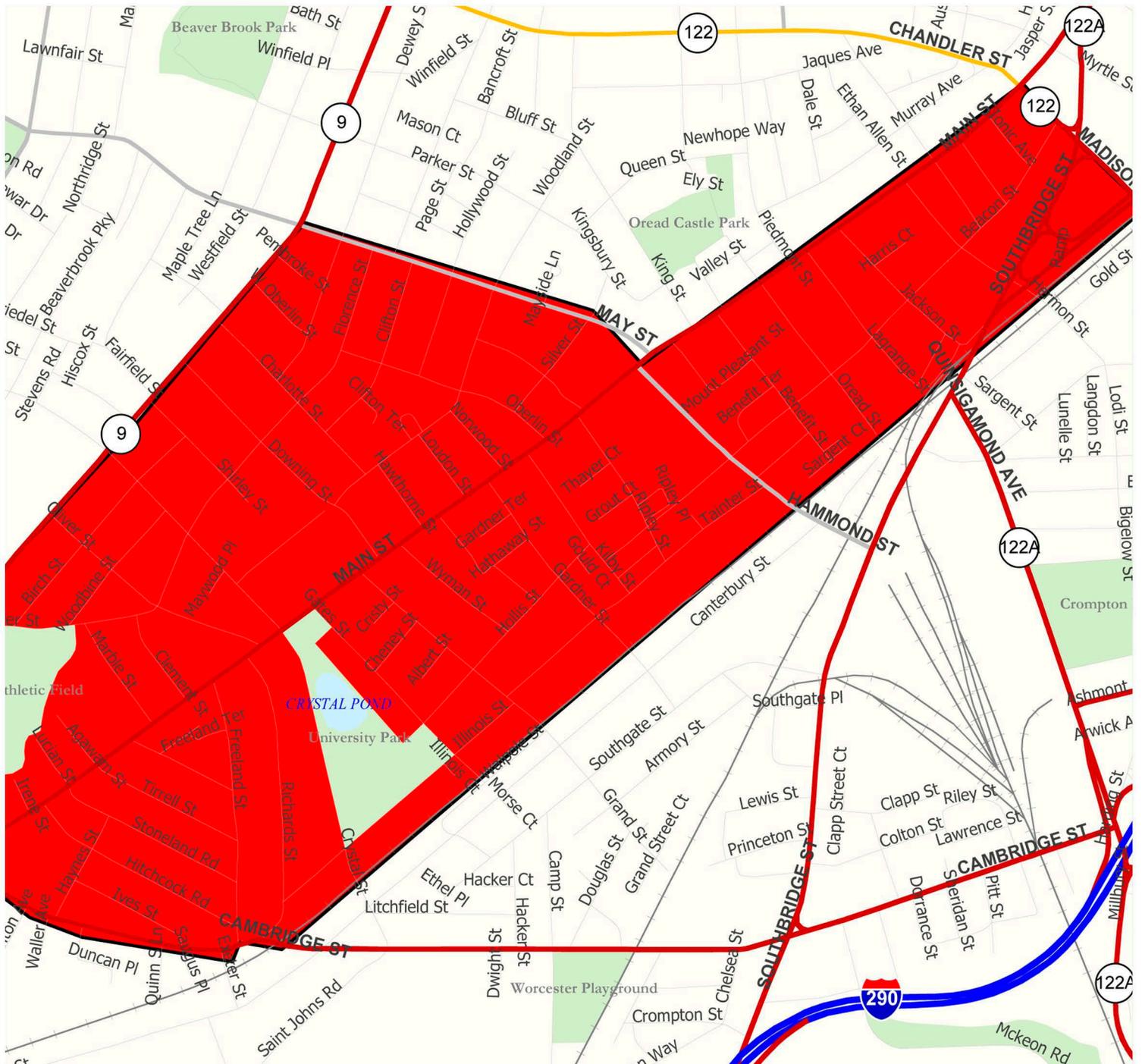
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APPENDIX: Figure 3b Frog Hollow, Hartford, CT



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APPENDIX: Figure 3b Main South, Worcester, MA



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Demographic Information, South End (Springfield, MA), Comparable Neighborhoods, Massachusetts
December 2007

		Demographic Comparison				Avg. Ann. Change		
		1990	2000	2006	2011 (Projection)	1990-2000	2000-2006	2006-2011
South End								
	Population	4,488	4,470	4,445	4,425	-0.04%	-0.09%	-0.09%
	Households	1,912	1,912	1,905	1,902	0.00%	-0.06%	-0.03%
	Median Household Income	\$16,071	\$19,422	\$21,161	\$22,454	2.09%	1.49%	1.22%
Main South Worcester								
	Population	12,495	12,272	12,577	12,862	-0.18%	0.50%	0.45%
	Households	4,171	4,142	4,281	4,400	-0.07%	0.67%	0.56%
	Median Household Income	\$18,628	\$23,711	\$26,146	\$28,079	2.73%	2.05%	1.48%
Chelsea Ngh								
	Population	15,341	18,956	17,906	17,087	2.36%	-1.11%	-0.91%
	Households	5,181	5,838	5,513	5,259	1.27%	-1.11%	-0.92%
	Median Household Income	\$23,806	\$30,348	\$34,461	\$36,845	2.75%	2.71%	1.38%
Codman Square								
	Population	10,426	10,825	10,160	9,645	0.38%	-1.23%	-1.01%
	Households	3,204	3,501	3,282	3,115	0.93%	-1.25%	-1.02%
	Median Household Income	\$35,596	\$36,684	\$41,431	\$44,444	0.31%	2.59%	1.45%
Frog Hollow								
	Population	11,156	9,323	9,466	9,574	-1.64%	0.31%	0.23%
	Households	3,860	3,255	3,239	3,235	-1.57%	-0.10%	-0.02%
	Median Household Income	\$13,687	\$17,334	\$20,369	\$21,824	2.66%	3.50%	1.43%

Source: Geoview/AGS, Inc.

**Demographic Information, South End (Springfield, MA), Comparable Neighborhoods, Massachusetts
December 2007**

Annual Income 2006					
<u>Income Level</u>	South End	Main South Worcester	Chelsea Neighborhood	Codman Square	Frog Hollow
Less than \$15,000	727	1,436	1,397	628	1,322
\$15,000 to \$25,000	390	623	726	379	541
\$25,000 to \$35,000	292	617	704	426	311
\$35,000 to \$50,000	156	637	711	544	420
\$50,000 to \$75,000	183	598	1,017	610	361
\$75,000 to \$100,000	58	195	443	338	132
\$100,000 to \$150,000	60	142	355	239	122
\$150,000 to \$200,000	5	20	79	50	7
More than \$200,000	34	13	81	68	23
	<u>1,905</u>	<u>4,281</u>	<u>5,513</u>	<u>3,282</u>	<u>3,239</u>

Source: Geoview/AGS, Inc.

Housing Tenure 2006					
	South End	Main South	Chelsea Neighborhood	Codman Square	Frog Hollow
Total Housing Units	2,046	4,642	6,105	3,667	3,721
Occupied Units	1,905	4,281	5,513	3,282	3,239
Vacant Units	141	361	592	385	482
Owner Occupied Units	370	1,003	1,693	1,419	515
Renter Occupied Units	1,535	3,278	3,820	1,863	2,724

Source: Geoview/AGS, Inc.

Housing Tenure 2006					
	South End	Main South	Chelsea Neighborhood	Codman Square	Frog Hollow
Total Housing Units	100%	100%	100%	100%	100%
Occupied Units	93%	92%	90%	90%	87%
Vacant Units	7%	8%	10%	10%	13%
Owner Occupied Units	19%	23%	31%	43%	14%
Renter Occupied Units	81%	77%	69%	57%	73%

Source: Geoview/AGS, Inc.

**Demographic Information, South End (Springfield, MA), Comparable Neighborhoods, Massachusetts
December 2007**

	Aggregate Retail Spending				Avg. Ann. Change		
	1990	2000	2006	2011	1990-2000	2000-2006	2006-2011
South End							
Total Retail	\$30,675,695	\$30,861,422	\$31,214,244	\$31,545,944	0.06%	0.19%	0.21%
Food and Beverage	\$11,437,512	\$11,506,761	\$11,638,312	\$11,761,987	0.06%	0.19%	0.21%
Apparel	\$1,008,218	\$1,014,323	\$1,025,919	\$1,036,821	0.06%	0.19%	0.21%
Main South							
Total Retail	\$60,061,168	\$60,057,335	\$63,374,426	\$66,099,175	0.00%	0.92%	0.86%
Food and Beverage	\$22,582,665	\$22,581,224	\$23,828,431	\$24,852,922	0.00%	0.92%	0.86%
Apparel	\$1,986,317	\$1,986,191	\$2,095,892	\$2,186,004	0.00%	0.92%	0.86%
Chelsea Ngh							
Total Retail	\$90,922,065	\$102,491,340	\$99,482,195	\$96,211,773	1.27%	-0.49%	-0.66%
Food and Beverage	\$33,936,390	\$38,254,588	\$37,131,433	\$35,910,758	1.27%	-0.49%	-0.66%
Apparel	\$3,067,010	\$3,457,268	\$3,355,763	\$3,245,444	1.27%	-0.49%	-0.66%
Codman Square							
Total Retail	\$62,574,992	\$66,810,099	\$64,294,872	\$61,910,881	0.68%	-0.63%	-0.74%
Food and Beverage	\$23,181,254	\$24,750,173	\$23,818,393	\$22,935,230	0.68%	-0.63%	-0.74%
Apparel	\$2,103,800	\$2,246,187	\$2,161,624	\$2,081,473	0.68%	-0.63%	-0.74%
Frog Hollow							
Total Retail	\$53,434,603	\$44,671,918	\$46,065,447	\$46,665,856	-1.64%	0.52%	0.26%
Food and Beverage	\$20,167,992	\$16,860,664	\$17,386,628	\$17,613,242	-1.64%	0.52%	0.26%
Apparel	\$6,087,969	\$5,089,609	\$5,248,378	\$5,316,785	-1.64%	0.52%	0.26%

Source: Geoview/AGS, Inc.

Appendix B/ Table 4b

Retail Analysis, South End (Springfield, MA), Comparable Neighborhoods, Massachusetts December 2007

Neighborhood	Households	Household Retail Spending	Total Retail Spending	Adjusted Neighborhood Retail SF [2]	Occupancy	Occupied Retail SF	Retail Spending Per Occupied SF	Occupied SF Per Household
South End	1,905	\$16,385	\$31,214,244	329,693	70%	231,000	\$ 135	121
South Main	4,281	\$14,804	\$63,374,426	343,333	100%	343,000	\$ 185	80
Codman Square	3,282	\$19,590	\$64,294,872	155,103	100%	155,000	\$ 415	47
Frog Hollow	3,860.00	\$18,006	\$46,065,447	369,386	100%	369,000	\$ 125	96

Notes

[1] Source - CoStar Commercial Real Estate Database, rounded, with adjustments by GLC to account for gaps in data.

[2] Chelsea excludes because of gaps in data.

Comparing Retail Mix By Neighborhood

Retail Storefronts by Neighborhood

Retail Type	South End	%	Frog Hollow	%	Main South	%	Chelsea	%	Codman Square	%
Restaurant	14	12%	18	18%	22	31%	19	14%	10	11%
Services	24	21%	24	24%	13	18%	35	25%	26	28%
Specialty	26	23%	33	32%	8	11%	40	29%	15	16%
Markets	7	6%	7	7%	5	7%	8	6%	4	4%
Convenience	1	1%	1	1%	4	6%	5	4%	6	6%
Automotive	3	3%	2	2%	2	3%	1	1%	1	1%
Community/Churches/Post Office	6	5%	8	8%	13	18%	16	12%	19	20%
Professional Office	10	9%	0	0%	0	0%	2	1%	2	2%
Health	4	3%	0	0%	0	0%	5	4%	4	4%
Miscellaneous (incl. funeral)	6	5%	0	0%	2	3%	0	0%	1	1%
Vacant Storefronts/Lots	14	12%	9	9%	3	4%	8	6%	6	6%
	115		102		72		139		94	

Leakage/Capture Analysis, South End and Downtown, Springfield, MA

Metro Center/South End Household Income Spent on Supermarket Goods (2006)	8,844 [1]
Metro Center and South End Households (2000)	3,962
Total Supermarket Eligible Expenditures	35,040,285
Potential Supermarket Capture	70% [2]
South End Sales Capture Available to Supermarkets	24,528,199
Less: South End Existing Retail Capture	17,934,000 [3]
Total Remaining Supermarket Sales For Capture	6,594,199
Average Supermarket Sales PSF	\$ 320 [4]
Supportable Supermarket Size	20,607

Standard Grocery Store Minimum Size	50,000 [5]
Premium "Urban" Grocery Store Minimum Size	30,000 [5]

Notes:

[1] Super Market Goods Include the following categories of retail spending:

Food And Beverages (2006)	6,109
Household Operations (2006)	1,213
Miscellaneous Expenses (2006)	663
Personal Care (2006)	561
Tobacco (2006)	298
Total	8,844

[2] Assumes 30% spent on food and beverage, house operatios, miscellaneous, personal care, tobacco outside supermarket.

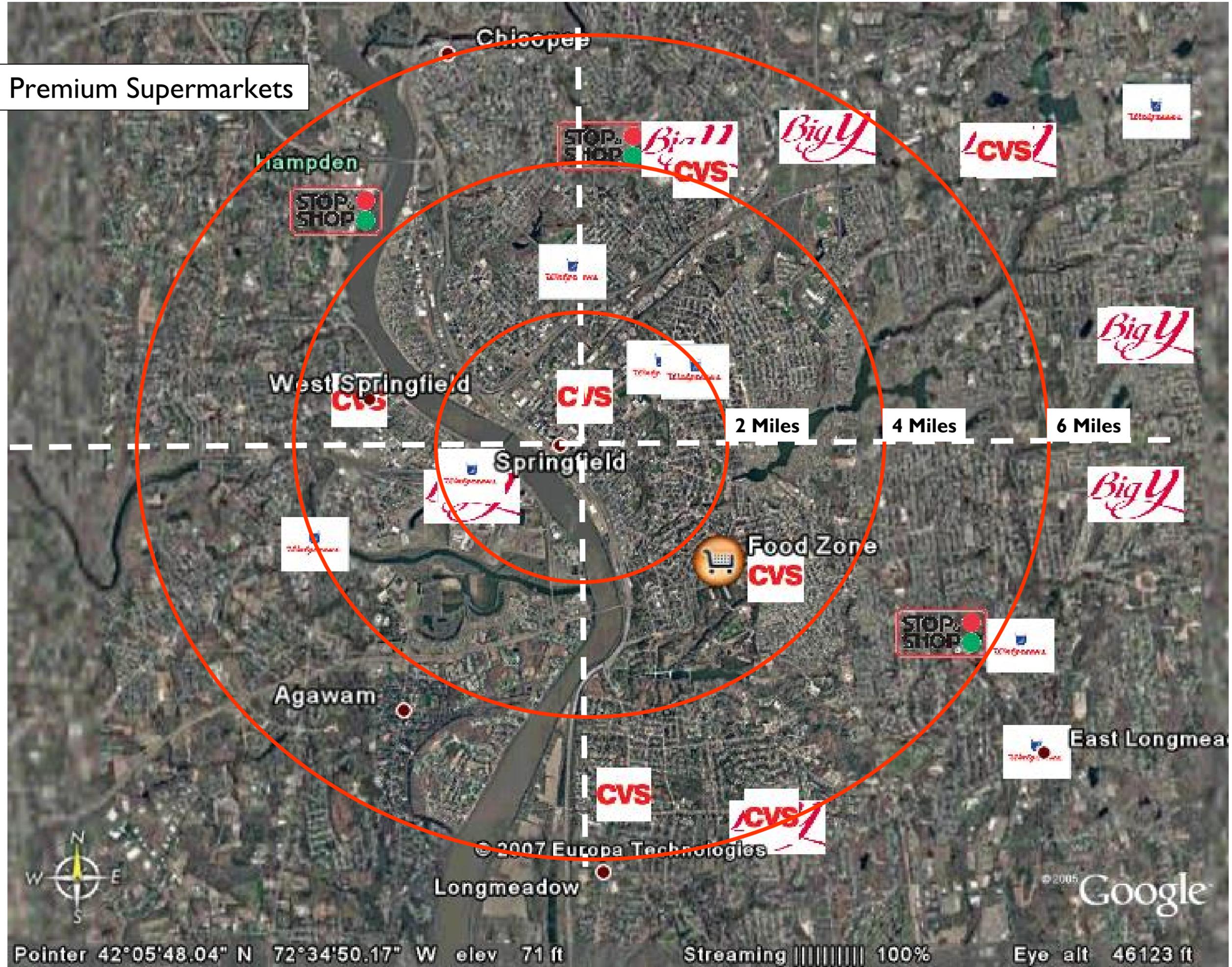
[3] Existing Metro Center/South End stores with supermarket goods assumed to be:

Mom & Rico's	3,000
A&C Market	7,000
Zonini's	3,000
Diaz Market	7,130
Los Primos Market	3,500
Albano Market	2,600
Saratoga Mini-Market	1,050
Frigo's	2,500
Food Zone	30,000
Total Existing Retail with Supermarket Goods	59,780
Assumed Annual Sales PSF	300
Existing Sales Volume in South End	17,934,000

[4] Dollars and Cents of Retail, ULI, 2006

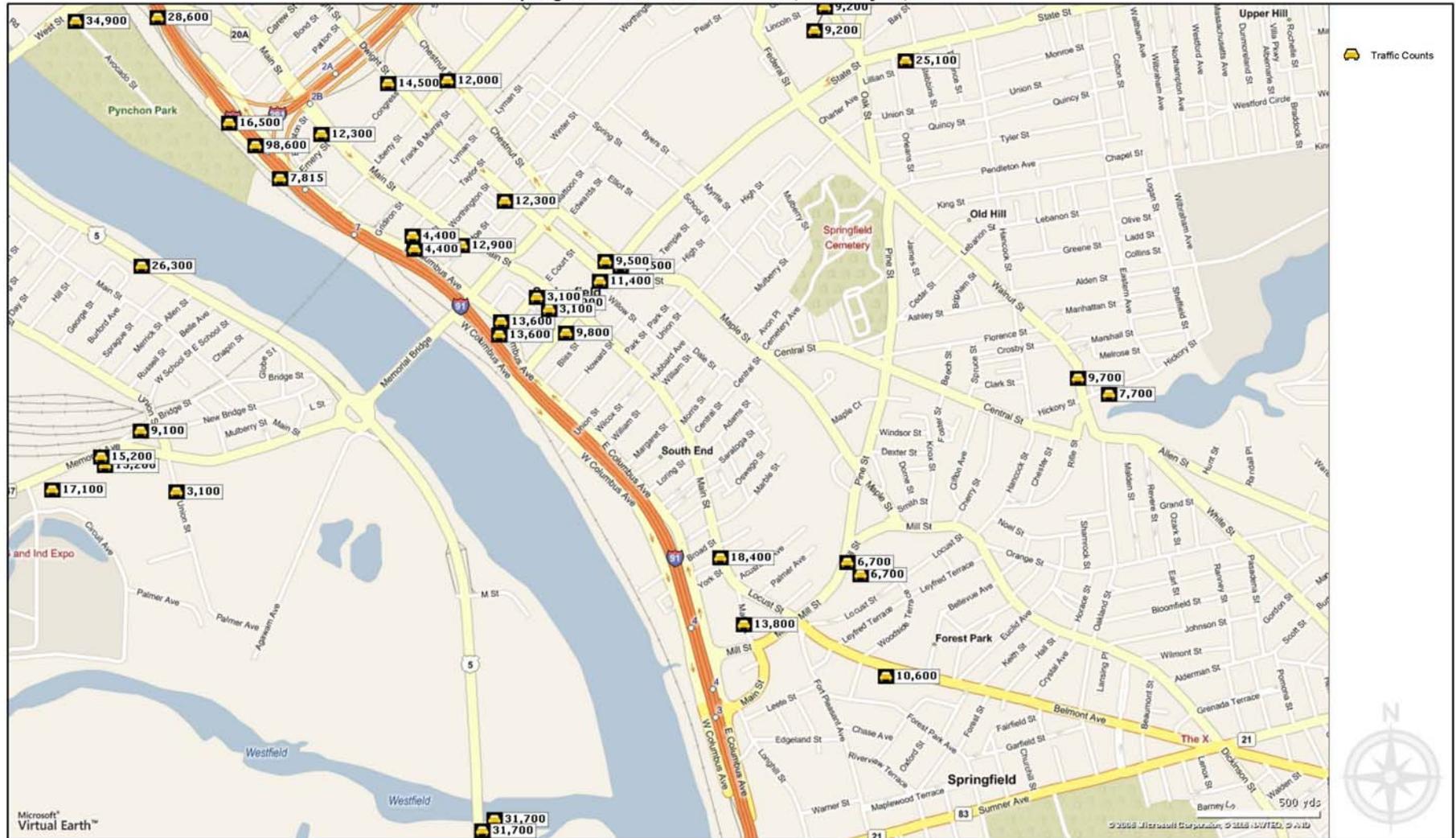
[5] Premium Grocery Stores are often willing to locate in smaller stores with non-traditional retail parking formats.

Springfield Regional Premium Supermarkets



APPENDIX: Figure 9b

Springfield Traffic Counts - Costar, February 20, 2007



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