

near eastside neighborhood retail study



City of
Indianapolis
Bart Peterson, Mayor



DEVELOPMENT CONCEPTS, INC.

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Acknowledgments

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chapter 1

executive summary

The goal of the Near Eastside Neighborhood Retail Study was twofold: 1) gather relevant market information to identify potential uses that could be supported by the study area and 2) identify potential sites for focusing retail development activity.

The market profile conducted as a part of this study examines the recent demographic history of the study area and potential trade areas for businesses utilizing 1990 Census information, estimates of the current population, and projections for the 2005 population as calculated by CACI Marketing Systems. The information collected from this national database provides a good starting point for understanding how retailers will view the Near Eastside; but, other tools should be used to supplement this material in order to paint an accurate picture of development opportunities.

While the market research indicates the potential for additional retail services, it may not tell the whole story. Oftentimes in inner city business districts, looking only at 'the numbers' does not immediately lead to a typical retail development strategy. Retailers and developers have traditionally utilized a model of targeting areas with high household incomes and/or extraordinary traffic volumes for their site selections. Knowing this tendency on the part of retailers, leaders of the Near Eastside neighborhoods can capitalize on a number of economic development opportunities that may allow the area to attract businesses and investment in a new way.

The Initiative for a Competitive Inner City (ICIC), and others have been promoting the untapped opportunities for retailers in central cities. Research conducted by ICIC and the Boston Consulting Group in 1998 revealed that inner cities possess more than \$85 billion in annual retail spending power, \$21 billion of which is unmet locally. Retail demand per inner city square mile is often two to six times greater than each metro area square mile and inner city households often spend more on apparel and groceries than the average U.S. household.

The income density in the Near Eastside is nearly \$107 million/square mile. Income density, combined with the proportional spending characteristics of inner city households, results in estimates that the Near Eastside neighborhoods could support retail services with more than \$54 million in annual spending. Based on the market information gathered, the types of uses most likely to succeed are ap-

parel, furniture and major appliances, sporting goods, games and toys, and pet supplies.

Other highlights of the market study are:

'Our specialized market research tools and data reveal inner-city market areas with over twice the sales opportunities of even the most prosperous suburban markets.'

Shelly Herman, Senior Managing Director, Shorebank Advisory Services

Stable Market – The number of households in the study area and the neighborhoods further east have remained almost constant during the past decade. This is due, in large part, to the fact that the neighborhood is older and well-established—i.e. there is little room for significant amounts of new construction. As such, retail businesses will need to draw from the existing customer base and/or create a unique, 'destination quality' for their services rather than expecting a growing population to provide their customer base.

Changing Demographics/Demand – The population of the study area is changing. The number of minorities, especially African-Americans and Hispanics, is increasing while the number of whites is declining. This changing demographic creates a change in demand for some services. As a result, businesses such as the Hispanic market and restaurants have surfaced in the neighborhood.

Property Values That Make Various Retail and Non-retail Land Uses Viable – The property values within the study area are fairly low compared to surrounding commercial areas. The low property values provide opportunities for commercial land and buildings on lower volume streets to be reused as housing or other non-retail uses.



Significant Competition in Close Proximity – Surrounding the Near Eastside study area are significant amounts and varieties of good and services. The Near Eastside will need to take this competition into account

when determining a mix of businesses that will thrive.

Currently, there is more than 640,000 square feet of retail space throughout the five square mile study area. Even as significant business investment such as that made by Horner Electric,

Marian, Inc., Cannon IV and others is occurring, 28% of retail space is vacant. The result is a lack of any retail concentration that is marketable as a destination—either for leisure or basic services purposes. In fact, there is very little retail that focuses on the neighborhood shopper in a concerted manner. There are, however, some unique quality businesses in the study area and, as described above, recent economic development investment by multiple private companies exceeds \$2.5 million. Part of the equation for new development may be to select strong local, existing retailers to relocate to new buildings. This strategy could provide a core customer base for a new retail center, a superior location for the existing business, and a more convenient shopping experience for the neighborhood residents.

Development Opportunity Action Steps

- Organize group to champion plan.
- Organize 10th St. business association.
- Present plan to MDC & request support.
- Assign responsibility for monitoring implementation of plan & neighborhood promotion.
- Consider new position to coordinate & work with businesses.
- Stay actively involved with planning of Market Square Arena site.
- Investigate rezoning of portions of Michigan & New York streets.
- Develop partnerships to collect & publish current data on neighborhood demographics.
- Establish database of neighborhood information; meet with brokers to present conditions.
- Create partnership with broker to promote area.
- Publish promotional report highlighting neighborhood data annually.
- Maintain updated traffic counts on Washington.
- Identify group to receive designation as CDE for utilization of New Markets Tax Credits.
- Host open house re: franchise opportunities.
- Continue NESCO business awards program.
- Develop small business assistance programs.

Although a number of strengths exist in the Near Eastside neighborhoods, a few are particularly relevant for leaders to highlight when promoting business investment opportunities and were the basis for the creation of a long-term action agenda:

- High-Traffic Corridors,
- Proximity to Downtown,
- Evidence of Entrepreneurship,
- Inner City Buying Potential, and
- New Markets Tax Credits.

In conjunction with the long-term activities, two sites, Washington at State and 10th between Rural and Olney, were identified as potential near-term development opportunities because they best responded to the following key retail development strategies:

- Use Washington Street to attract commuters/downtown users and to serve the neighborhood population.
- Identify sub-districts for 'themed' retail services.

In summary, neighborhood leaders and the City of Indianapolis can redirect the retail development investment pattern that has been occurring in the Near Eastside by: gathering and marketing the most accurate information regarding opportunities in the neighborhood, identifying tools to support the small businesses and entrepreneurs that have become the hallmark of the area, and focusing initial development efforts in the recommended target areas.

Retail Development Target Areas

Target Area A: Washington & State Streets

Boundaries: Both Sides of Washington between Pine & State Streets.

Uses: Apparel, furniture, major appliances, sporting goods, games & toys, pet supplies, dry cleaner, video store, grocery, low density offices and commercial services.

Characteristics: Primarily vehicular-oriented but accessible from neighborhood, containing mixed uses to 'extend' Downtown to the east, containing commuter- and neighborhood-oriented uses.

Action Steps: Hold meeting with property owners, determine potential near-term site configuration, determine feasibility of consolidating additional properties, consider City Redevelopment Area designation & package incentives, prepare RFP to solicit developers.

Target Area B: 10th Street between Rural & Olney Streets

Boundaries: Initially, 10th Street between Gray & Tuxedo with growth potential to extend to Rural & Olney.

Uses: Specialty, 'destination' type of retailers; could capitalize on existing antiques theme or develop a 'little Mexico;' plans for renovation of Rivoli Theater will influence uses.

Characteristics: Providing a pedestrian-oriented character with a distinct sense of place, offering a unique, destination quality, capitalizing on existing anchors (such as the antique stores and Hispanic restaurants).

Action Steps: Create 10th Street business association, finalize development themes, formulate redevelopment strategy for Rivoli Theatre, consider creation of commercial district manager position, prepare public improvements 'wish list,' create list of businesses that are complementary to desired themes, create inventory of available space & keep brokers informed of vacancies, create business district incentive program, create marketing program including map of area & services.

**'All of our inner city stores are now
above average or highly successful.
Our number one franchising priority is
now the inner city.'**

**Russell Smith, International Director
of Franchise Sales, Athlete's Foot**

chapter 2

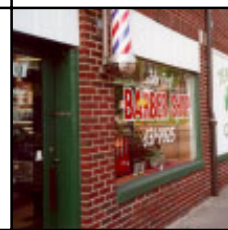
neighborhood profile

The Near Eastside Neighborhood is an assortment of smaller neighborhoods located within the boundaries of Massachusetts Avenue/21st Street on the north, the Conrail tracks just south of Washington Street on the south, Emerson Avenue on the east, and Interstate 65 on the west. The focus area for this retail market study, also known as the Highland-Brookside Neighborhood—the area bounded by 10th Street to the north, the Conrail tracks and Sherman Drive to the east, Washington Street to the south, and I-65/70 to the west—is a subset of the Near Eastside Neighborhood. Because the charge of this effort was to identify retail development opportunities, this report focuses on the mixed-use east-west corridors that traverse the study area: Washington, New York, Michigan, and 10th streets. Neighborhoods within the study area include Cottage Home, Woodruff Place, Eastern Alert, and Arsenal Heights. Other neighborhoods such as Windsor Park, Brookside Bunch, Springdale, and more than 15 others are considered part of the Near Eastside Neighborhood but are located outside of the study area.

The area now known as the Near Eastside Neighborhood initially developed along the banks of Pogue's Run in the early 19th Century. The area grew around this small stream into a collection of residential neighborhoods with surrounding and supporting industries. The most prominent industrial use came in 1862 when the United States Congress passed an act that brought a National Arsenal to Indianapolis. Constructed on 75 acres between 10th and Michigan streets, the arsenal manufactured Civil War arms. Arsenal Avenue was built to connect this storage and repair facility with the National Road, now Washington Street.

The arsenal attracted a significant number of German and Irish immigrants to the area whose heritage led to the architectural styles of many of the neighborhood residential structures. In 1903, the arsenal closed. Nine years later, ownership of the property was transferred to Indianapolis Public Schools becoming Arsenal Technical High School, IPS's first open campus school. Still considered the City's most significant military structure, the arsenal is listed on the National Register of Historic Places.

One of the most distinctive residential neighborhood in the Near Eastside and the City is Woodruff Place, planned and initially developed by James Woodruff in 1872. Bounded by 10th and Michigan streets and adjacent to the arsenal, the layout of Woodruff Place, which includes three prominent drives, Victorian homes, open spaces, iron fencing, masonry walls, fountains, promenades, and lavish landscaping was inspired by the formality of Versailles. By 1875, local socialites began buying, building, and moving into Woodruff Place's new homes. In 1876, Woodruff Place became a corporate city; in 1953, it was annexed by the City of Indianapolis.



Along with construction of the arsenal and Woodruff Place in the mid- to late-1800s, other neighborhoods within and around the study area emerged including Cottage Home, Arsenal Heights, and Windsor Park.

A SWOT (strengths, weaknesses, opportunities, threats - see next page) analysis to identify the study area's relative advantages and disadvantages was conducted by the planning team through site surveys and stakeholder interviews. Most of the identified weaknesses and opportunities parallel the 'problems' and 'potentials' mentioned in the 1993 *Highland-Brookside Housing Improvement and Neighborhood Plan*. As in the *Highland-Brookside Plan*, most concerns could be classified as either physical or quality of life issues.

According to the *Highland-Brookside Housing Improvement and Neighborhood Plan*, 1992 land use in the Near Eastside Neighborhood was approximately 74% residential. The area remains primarily single-family residential with light and heavy industrial areas around the periphery, bordering the rail line and interstate. Most residences were built in the late 19th Century as working class homes for employees of surrounding industries. With the exception of Woodruff Place, most single-family homes are modest wood-frame structures some with Victorian and Queen Anne architectural elements. Woodruff Place is one of the City's most grandiose neighborhoods and a definite focal point in the Near Eastside Neighborhood. Cottage Home and adjacent Windsor Park are also listed on the National Register. Cottage Home and Woodruff Place are currently receiving the greatest amount of homeowner investment and improvements. The *Highland-Brookside Plan* indicated that Cottage Home was the neighborhood with the most redevelopment opportunity.

Public uses like Arsenal Technical High School and the Indiana Women's Prison have significant presence in the Near Eastside. Arsenal Tech is a community resource that contributes to a distinctive and historic character of the study area,

but it is not a part of the neighborhood's functional open space. As expected, the prison is isolated, does not relate to its surroundings, and is not considered a neighborhood resource. Other public and institutional uses that include the Boner Community Center, churches, and schools are scattered throughout the area. Park space within the study area boundaries is limited to Highland Park at the intersection of New York Street and Highland Avenue. Willard Park is south of Washington Street between Walcott and Hendricks. Pogue's Run, a linear park, traverses the neighborhoods north of 10th Street (Windsor Park, Brookside Bunch, Springdale) leading to Brookside Park.

Vacant commercial buildings are present along 10th, Michigan, New York, and Washington streets with a concentration on 10th Street between Temple and Dearborn. The predominance of surface parking lots exists adjacent to commercial buildings containing auto-related retail and services. The abundance of used car dealerships gives the perception that the study area contains more parking and vacant lots than is actually the case.

Four east-west streets allow the study area access to and from Downtown. With traffic counts ranging between 20,000 and 24,000 vehicles per day, Washington Street, a significant gateway, is



<p style="text-align: center;">Strengths</p> <p>Proximity to Downtown Active neighborhood groups High traffic volumes on Washington New development on Washington Established businesses Historic structures Evidence of entrepreneurship</p>	<p style="text-align: center;">Weaknesses</p> <p>Building conditions Vacant & underutilized properties Poor property conditions Unkempt lots & properties Poor interstate access Low spending potential Crime One-way streets</p>
<p style="text-align: center;">Opportunities</p> <p>Vacant buildings & lots Proximity to interstate Diverse resident profile Low property costs Woodruff Place/reinvestment Corridors/gateways to Downtown Downtown workers Diverse housing stock Housing & population density</p>	<p style="text-align: center;">Threats</p> <p>Property speculation Real estate cost escalation Small business failures Negative perceptions Deteriorating properties Unmotivated property owners</p>

a two-way major thoroughfare providing the most direct route to Downtown. 10th Street is also a two-way street into and out of Downtown with lower traffic volumes, between 12,600 and 15,500 daily vehicle trips. Michigan Street is a one-way westbound street with traffic counts between 12,400 and 14,200 vehicles per day. New York Street is one-way eastbound with a range of 10,800 to 11,600 vehicles per day. Major north-south streets in the study area are Rural Street (9,400 to 13,900 vehicles per day) and Sherman Drive (11,000 to 12,200 vehicles per day). IndyGo bus lines run along all the above-mentioned streets with the exception of Sherman Drive.

Traffic on I-65/70 ranges between 131,000 and 150,900 vehicles per day. Access to the study area for northbound interstate traffic is at the Market Street exit. No direct access exists for southbound traffic. The nearest exit is at Michigan and Ohio streets, which directs traffic into Downtown.

As in many neighborhoods with historic character, the study area's residential neighborhoods are benefiting from a general interest in historic preservation, especially in Woodruff Place and Cottage Home where homeowners are demonstrat-

ing obvious signs of investment and improvements. New commercial development activity has taken place on Washington Street, near Sherman Street, with recent additions of several new national chain retailers – including CVS, Walgreen’s, and Rally’s. Improvements have been made in Willard Park and, as a result, is utilized more often. The proposed Downtown connection/expansion of the Monon Trail at 10th Street will provide a recreational amenity to the residents of the Near Eastside Neighborhood. With the recent demolition of Market Square Arena and the potential removal of the Market Street interstate on-ramp, access to the study area from Downtown will be improved, possibly allowing for the Near Eastside Neighborhood to capitalize on the success and momentum of Downtown development.



chapter 3

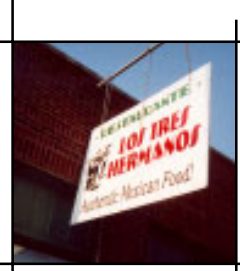
existing retail & service uses

The Near Eastside study area currently has a significant amount of retail within it; however, those services are, for the most part, so scattered and dispersed resulting in a lack of any retail concentration that is marketable as a destination—either for leisure or basic services purposes. In fact, there is very little retail that focuses on the neighborhood shopper in a concerted manner. While the existing Kroger store at 10th and Sterling streets is a commercial asset in the neighborhood, the quality of its products and service could be improved upon. Most of the retail space in the study area would benefit from physical improvements that would enhance the overall visual appearance of the commercial corridors; however, there are some unique quality businesses in the study area. Part of the equation for a new center

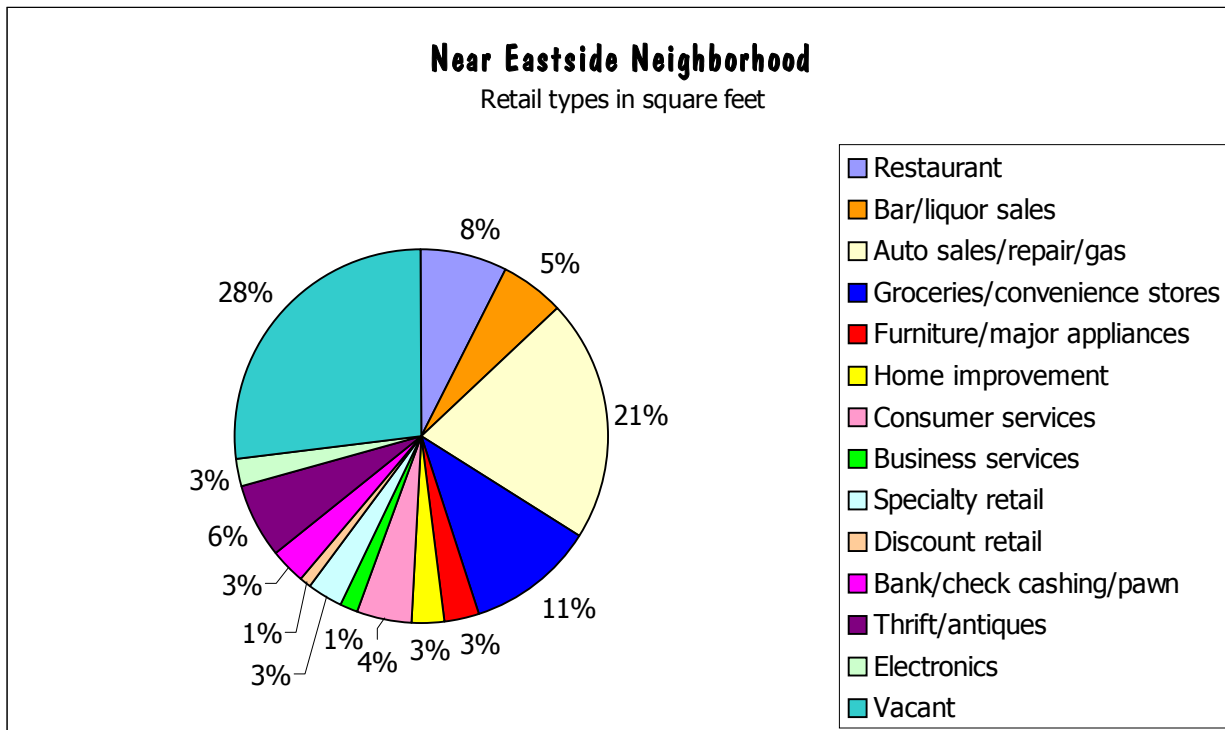
may be to select strong local, existing retailers to relocate to a new retail building. This strategy could provide a core customer base for a new center, a superior location for the existing business, and a more convenient shopping experience for the neighborhood residents.

Currently, along Washington, New York, Michigan, and 10th streets, there is 644,000 square feet of retail space. Of this space, 28% is currently vacant. The estimated amount of retail space, by category for the Near Eastside Neighborhood is shown at left. The largest category is vacant space followed by auto sales/repair/gas.

Commercial uses dominate 10th and Washington streets. A lesser, but still significant amount, of commercial activity can be found along Michigan and New York streets. For the most part, retail on Washington Street is oriented towards the commuting population and auto-related uses, in terms of building design and types of goods and services offered. 10th Street is more of a neighborhood retail district. The limited commercial services along Michigan and New York streets could be considered destination retail with a broader appeal than to only those residing within the immediate neighborhoods. Examples of such activity generators are the Michigan Street Antique Center, Midland Arts and Antiques Market, Cycle-Re-Cycle, Utrillo's Art, El Sol, and others.



Existing Retail Space in the Near Eastside	
Restaurant	48,900 s.f.
Bar/liquor sales	35,000 s.f.
Auto sales/repair/gas	135,000 s.f.
Groceries/convenience stores	71,600 s.f.
Furniture/major appliances	19,200 s.f.
Home improvement	18,600 s.f.
Consumer services	28,800 s.f.
Business services	29,200 s.f.
Specialty retail	20,100 s.f.
Discount retail	8,000 s.f.
Bank/check cashing/pawn	19,600 s.f.
Thrift/antiques	40,100 s.f.
Electronics	16,800 s.f.
Vacant	173,200 s.f.
Total	644,100 s.f.



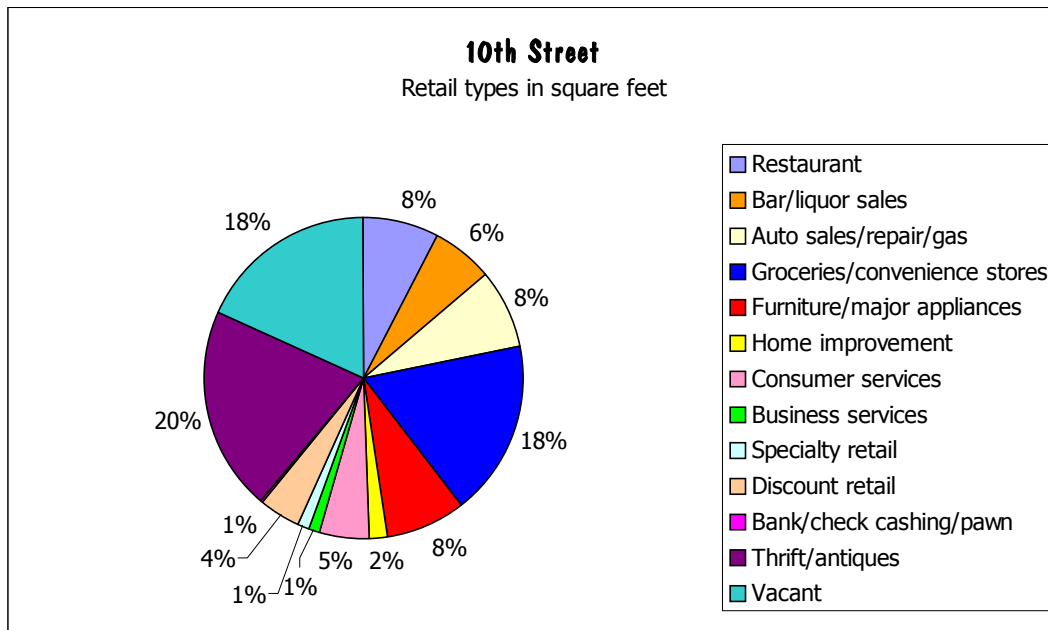
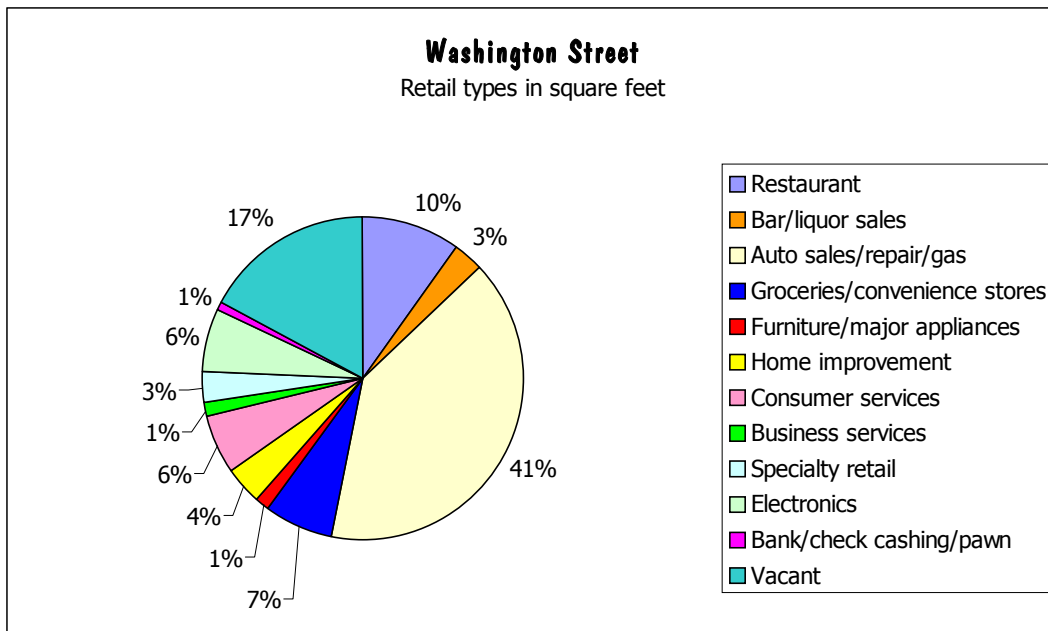
Washington Street is the most commercialized street in the study area. Its role as a route for commuting traffic has influenced the types of retail and services offered as well as the building designs. At the intersection of Washington Street and Sherman Drive is Sherman Commons, a suburban-style retail strip development anchored by Marsh and including Subway, Page One, American Payday, RentaCenter, Blockbuster, and others. Sherman Commons serves as a community commercial center for Near Eastside residents; its building design and site layout encourages a customer base with use of an automobile. Proximate to Sherman Commons is a commuter retail district that includes Walgreen's and a collection of fast-food restaurants.

A majority of commercial uses along Washington Street are centered on automobile ownership and maintenance. Several used car dealerships and repair shops have created an auto retail corridor. Many of these businesses have a marginal presence, in terms of their quality and appearance, and detract from the residential appeal of adjacent neighborhoods. Retail strengths include

Firehouse Image Center, a steadfast owner of a converted historic fire station, O'Leary Paint, and El Sol, a Mexican restaurant with a citywide draw.

10th Street has the character of a neighborhood commercial district. Many area residents walk to the retail establishments on this street. The intersection of 10th and Rural includes a few historic commercial buildings available for renovation, one of which is being renovated for housing with ground floor retail by Partners in Housing. 10th Street contains the most vacant storefronts in the study area. Nearly all residential structures, east of Woodruff Place, have been converted to commercial use. Value Village, New 2 You Appliances, Audrey's Place, Declare's Antiques, and other retailers specializing in re-sale goods have a dominant presence in this neighborhood commercial district. These types of businesses consume 20% of 10th Street's retail space.

Commercial uses along Michigan Street are sporadic. Retail focal points such as Michigan Street Antique Center, Midland Arts and Antiques Market, Fish Bowl Pet Shop, Hispanic Food Market,



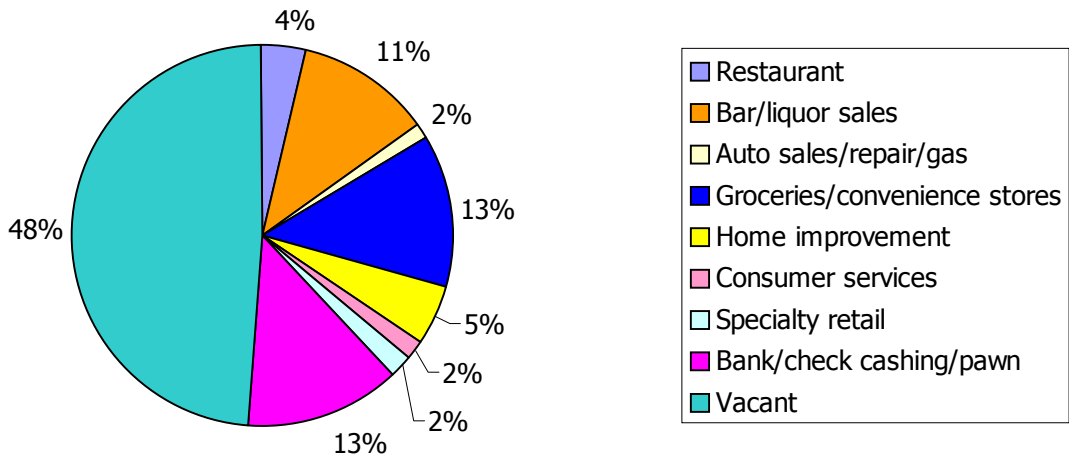
and Los Tres Hermanos comprise a specialty niche with customer appeal extending outside the study area. However, a large percentage of this street's limited retail space is vacant. Light industrial uses are also scattered throughout the commercial uses.

New York and Oakland is the study area's only full-service bank. All other banking services are in the form of check cashing establishments. New York Street also has a few used car lots, reinforcing the presence of auto sales and service in the study area.

Like Michigan Street, commercial space on New York Street is scattered and includes a significant amount of vacant space. A Bank One branch at

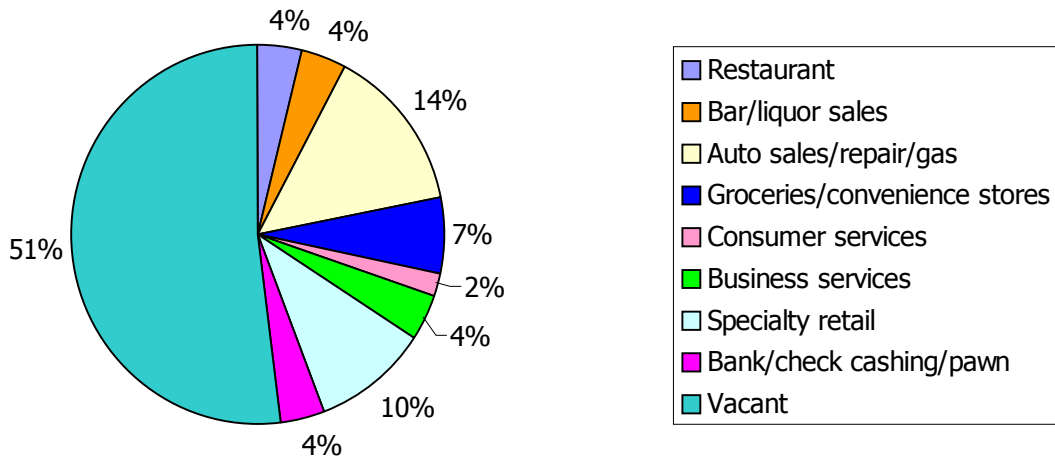
Michigan Street

Retail types in square feet



New York Street

Retail types in square feet



chapter 4

market overview

The market profile conducted as a part of this study examines the recent demographic history of the study area and potential trade areas for businesses, projects the population, number of households, and income levels in the year 2005, and includes data on consumer spending patterns. The analysis utilizes 1990 Census information, estimates of the current population, and projections for the 2005 population as calculated by CACI Marketing Systems.

The purpose of this market analysis was to determine retail demand and supply in the Near Eastside study area in order to determine which additional retail businesses are most likely to benefit from a location within the neighborhood. A variety of data collection techniques were utilized to determine retail supply and demand:

National Database: Demographic data was purchased from CACI Marketing Systems and included information such as population, households, and income from 1990 and estimates and

projections for 2000 and 2005. The data also included estimates of spending by the residents of the two trade areas defined for the study. The information collected from this national database provides a good starting point for understanding how retailers will view the Near Eastside; but as described elsewhere in this report, other tools should be used to supplement this material.

Primary Research: Information regarding demand was also determined with firsthand research through a survey that was distributed to neighborhood residents. In addition, interviews and focus group discussions were conducted with neighborhood residents and business owners/managers.

Site Inspection: To estimate retail supply, the project team performed "windshield surveys" of the study area by driving the neighborhood to determine the types and locations of retail businesses. Buildings were categorized as occupied or vacant based upon their appearance during this site inspection. Retail businesses in the occupied buildings were then categorized by business type, such as restaurants, auto related, grocery/convenience, discount retail, etc. The size of each retail business was estimated using a scaled map with building footprints.



Near Eastside Market Study Highlights

Stable Market

Changing Demographics & Demand

Property Values Make Various Retail & Non-Retail Land Uses Viable

Significant Competition in Close Proximity

Based upon the above information, the relationship between retail demand and supply were studied. Retail spending was converted into estimates of the retail space that can be supported using national averages of sales per square foot. This amount of space which the local community can support was then compared to the current retail supply to estimate retail leakage. Retail leakage occurs when retail purchases by neighborhood residents take place outside of the neighborhood.

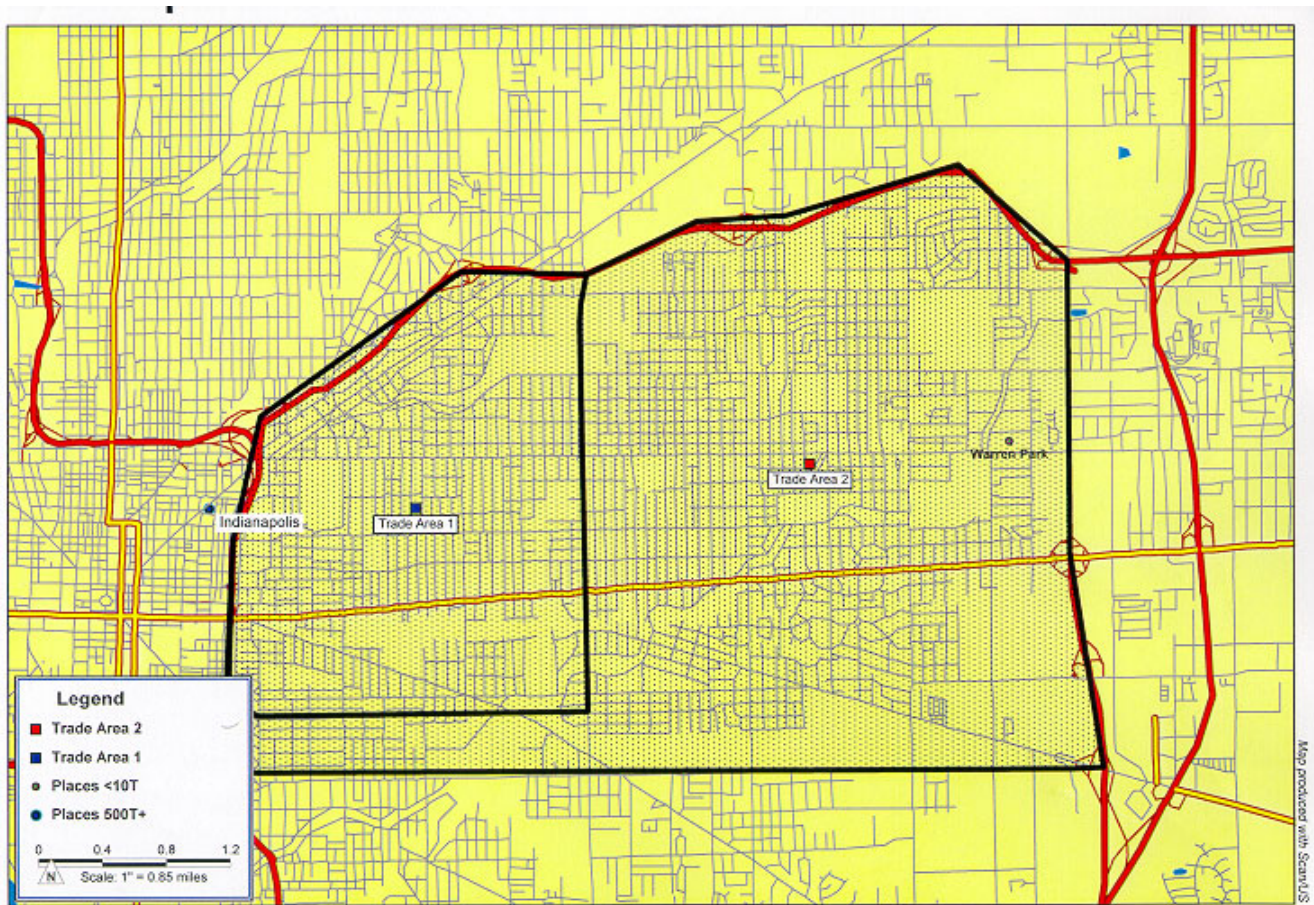
Two trade areas were defined and profiled as part of this retail market study. The following map shows the boundaries for the two trade areas. Because the objectives of the market study were to focus on neighborhood-based goods and services, the trade areas are relatively small.

The Neighborhood Trade Area is bounded by I-65/70, I-70, Sherman Drive, and Fletcher Avenue. The Extended Trade Area is bounded by I-65/70, Fletcher Avenue, Sherman Drive, I-70, Shadeland

Avenue, Prospect Street and its imaginary extension. These trade areas were defined based on expected shopping patterns of the residents in the area. Residents in the Neighborhood Trade Area are expected to be the primary customers for most of the retail businesses within the Near Eastside study area. Residents of the Extended Trade Area also provide a customer base for the study area; however, the further they live from the study area, the chances are greater that their basic retail needs are being met elsewhere.

Neighborhood Trade Area Population Characteristics

According to CACI Marketing Systems, the population of the Neighborhood Trade Area is declining slightly. In 1990 the population was 33,114, while in 2000 the estimated population was 31,904. This is a decline of 1,210 or 3.6%. Part of the decline in population has to do with a decline in the average size of the households and a lack of new housing development. The average



Population Snapshot of the Near Eastside

	Neighborhood Trade Area	Extended Trade Area
1990 Population	33,114	84,176
2000 Population	31,904	81,540
2005 Population	31,231	79,934
1990 Households	11,918	33,416
2000 Households	11,788	33,206
2005 Households	11,679	32,935
1990 Median HH Income	\$17,892	\$21,964
2000 Median HH Income	\$25,581	\$30,616
2005 Median HH Income	\$28,411	\$33,789
Per Capita Income	\$11,474	\$14,773
Homeownership (1990)	46.9%	56.7%
Median Home Value (1990)	\$27,099	\$38,325
No Vehicles Available (1990)	25.4%	18.4%
Aggregate Income	\$363,058,612	\$1,200,828,578

Source: CACI Marketing Systems

Neighborhood Trade Area Boundaries - I-65/70, I-70, Sherman Dr. and Fletcher Ave.

Extended Trade Area Boundaries - I-65/70, Fletcher Ave. Sherman Dr. I-70, Shadeland Ave., Prospect St. & its imaginary extension to Shadeland Ave.

household in 1990 contained 2.78 people while the average household in 2000 contained 2.71 people. The Neighborhood Trade Area contained 11,918 households in 1990 and 11,788 households in 2000, a decrease of 1.1%.

The median income of the Neighborhood Trade Area is significantly lower than the Indiana median income, \$25,581 versus \$37,909. The median income of the trade area increased during the 1990s an estimated 43%.

Extended Trade Area Population Characteristics

The Extended Trade Area is the area most likely to contribute a significant number of commuters to the Near Eastside Neighborhood. Travel from the Extended Trade Area into the Near Eastside Neighborhood is very easy, as is travel through the neighborhood to Downtown. The ease of travel between the two areas will also provide

the Near Eastside study area with additional consumers from the Extended Trade Area regardless of commuting patterns, if attractive shopping opportunities are provided.

The population of the Extended Trade Area is also declining slightly. In 1990 the population was 84,176, while in 2000 the estimated population was 81,540. This is a decline of 2,636 or 3.1%. The Extended Trade Area contained 33,416 households in 1990 and 33,206 households in 2000, a decrease of 0.6%. The area is only projected to lose 271 households between 2000 and 2005.

The 2000 median income of the Extended Trade Area is between that of the Neighborhood Trade Area and the State of Indiana at an estimated \$30,616. The median income of the trade area increased during the 1990s an estimated 39%.

ACORN Groups

CACI uses a Classification of Residential Neighborhoods (ACORN) as a means of characterizing segments of neighborhood populations. Sixty-one lifestyle characteristics, such as income, age, and occupation, are used to determine the consumer behavior of residents. ACORN has nine general groups. Each group contains three to seven clusters for a total of 43 clusters. The clusters provide a classification system for predicting the purchasing habits of neighborhood residents. Many retailers and commercial developers use the ACORN classification system when making location decisions for retail investment. The ACORN profiles for the neighborhood and extended trade areas are included in the Appendix.

Retail Trade Analysis

The spending potential index from CACI Marketing Systems compares the average expenditure for a product or service locally to the average amount spent for the product or service nationally. A value of 100 represents the national average. An index greater than 100 shows higher than average spending; an index less than 100, lower spending (relative to the U.S. average). For example, an index of 120 shows that average spending by consumers in the trade area is 20% higher than the U.S. average; an index of 85, 15% lower than the U.S. average. The information is based on the Bureau of Labor Statistics' Consumer Expenditure Interview Survey. Spending patterns are differentiated by socioeconomic characteristics and geography; they are updated to current prices using the Consumer Price Index. The tables on pages 18 and 19 show the spending potential of the Neighborhood and Extended trade areas. Generally, the spending potential index in the Neighborhood Trade Area is 50 to 60. The spending potential index for the Extended Trade Area is slightly greater in the 60 to 66 range.

Each area has been analyzed with regard to the amount of potential spending the study area may be able to capture. Two capture rates were utilized for each market area. As the market area expands, the capture rate is expected to diminish because more options are available to consum-

ers. As such, the analysis of the Neighborhood Trade Area utilizes capture rates of 25% to 50%; the Extended Trade Area analysis utilizes a rate of 5% to 10%.

Within the scope of this study, there was no way to determine the current capture rates of existing retail and service providers. As such the capture rates used for the spending potential analysis are benchmark estimates which can provide some indication of how much demand there is for specific types of services.

Using the capture rate estimates and national average sales per square foot for a number of product and service categories, a determination regarding the potential demand for retail services can be projected. This demand is measured by the amount of space (in square feet) that can be supported in the area. For example, the total demand for retail space in the Near Eastside study area (both trade areas) is 222,707 square feet based on the use of the lower capture rates of 5% and 25%.

The third table, Excess Retail Demand shown below takes the total square feet demanded by category and compares these totals with the estimated totals for space currently utilized in the neighborhood. The greatest additional demand appears to be for apparel and furniture/home appliances.



**NEIGHBORHOOD TRADE AREA
I-65/70, I-70, SHERMAN DRIVE, & FLETCHER AVENUE**

	Current Total Dollars Spent*	Current Spending Potential Index**	Estimated Demand - Scenario #1			Estimated Demand - Scenario #2			Potential Demand	
			Potential Capture Rate	Total Sales Captured	Nat'l Ave. Sales Per Square Foot***	Potential Space Demand (s.f.)	Potential Capture Rate	Total Sales Captured		Nat'l Ave. Sales Per Square Foot***
PERSONAL PRODUCTS										
Men's Apparel	\$3,227,305	54	25%	\$806,826	\$178.94	4,509	50%	\$1,613,653	\$197.78	8,1
Women's Apparel	\$6,049,671	57	25%	\$1,512,418	\$172.99	8,743	50%	\$3,024,836	\$191.20	15,8
Children's/Infants' Apparel	\$2,859,058	57	25%	\$714,765	\$145.21	4,922	50%	\$1,429,529	\$160.49	8,9
Footwear	\$3,264,018	60	25%	\$816,005	\$150.14	5,435	50%	\$1,632,009	\$165.94	9,8
Watches & Jewelry	\$1,329,616	49	25%	\$332,404	\$298.52	1,114	50%	\$664,808	\$329.94	2,0
Restaurants	\$15,730,975	56	25%	\$3,932,744	\$200.66	19,599	50%	\$7,865,488	\$221.78	35,4
Books & Periodicals	\$1,651,699	50	25%	\$412,925	\$177.99	2,320	50%	\$825,850	\$196.73	4,1
Cameras & Equipment	\$863,051	54	25%	\$215,763	\$266.33	810	50%	\$431,526	\$294.37	1,4
Luggage	\$81,065	48	25%	\$20,266	\$210.63	96	50%	\$40,533	\$232.81	1,7
Optical Goods	\$575,253	64	25%	\$143,813	\$194.55	739	50%	\$287,627	\$215.03	1,3
Pets & Supplies	\$1,864,820	51	25%	\$466,205	\$115.43	4,039	50%	\$932,410	\$127.59	7,3
Sporting Goods	\$1,411,955	54	25%	\$352,989	\$145.06	2,433	50%	\$705,978	\$160.33	4,4
Games & Toys	\$1,420,745	54	25%	\$355,186	\$130.38	2,724	50%	\$710,373	\$144.10	4,9
HOUSEHOLD PRODUCTS										
Groceries	\$30,118,642	59	25%	\$7,529,661	\$311.72	24,155	50%	\$15,059,321	\$344.54	43,7
Alcoholic Beverages	\$2,864,157	57	25%	\$716,039	\$203.60	3,517	50%	\$1,432,079	\$225.04	6,3
Home Improvement	\$4,719,116	55	25%	\$1,179,779	\$154.61	7,631	50%	\$2,359,558	\$170.89	13,8
Major Appliances	\$1,626,291	54	25%	\$406,573	\$177.28	2,293	50%	\$813,146	\$195.94	4,1
Television & Sound Equipment	\$6,129,741	58	25%	\$1,532,435	\$195.85	7,825	50%	\$3,064,871	\$216.47	14,1
Furniture	\$3,537,833	53	25%	\$884,458	\$137.64	6,426	50%	\$1,768,917	\$152.12	11,6
Other Household Furnishings	\$7,336,682	52	25%	\$1,834,171	\$136.27	13,460	50%	\$3,668,341	\$150.61	24,3
Personal Computers	\$1,727,208	51	25%	\$431,802	\$137.27	3,146	50%	\$863,604	\$150.61	5,7
Lawn & Garden	\$2,110,641	49	25%	\$527,660	\$138.27	3,816	50%	\$1,055,321	\$151.61	6,9
PERSONAL SERVICES										
Theater & Movies	\$860,744	58	25%	\$215,186	\$57.91	3,716	50%	\$430,372	\$64.01	6,7
Video Rental	\$434,073	68	25%	\$108,518	\$81.87	1,325	50%	\$217,037	\$90.49	2,3
TOTAL										
Total Expenditures****	\$344,320,001	54								

* Source: CACT Marketing Systems

** Spending potential index measures the amount spent for a product compared to the national average of 100. For example, an index of 105 indicates spending patterns are 5% greater than the national average.

*** Source: Urban Land Institute

**** Includes items not listed above, such as housing, utilities, and transportation

**EXTENDED TRADE AREA
I-65/70, FLETCHER AVENUE, SHERMAN DRIVE, I-70, SHADELAND AVENUE, PROSPECT STREET & ITS IMAGINARY EXTENSION**

	Current Total Dollars Spent*	Current Spending Potential Index**	Estimated Demand - Scenario #1			Estimated Demand - Scenario #2			Poter Dem
			Potential Capture Rate	Total Sales Captured	Nat'l Ave. Sales Per Square Foot***	Potential Capture Rate	Total Sales Captured	Nat'l Ave. Sales Per Square Foot***	
PERSONAL PRODUCTS									
Men's Apparel	\$10,599,375	63	5%	\$529,969	\$178.94	2,962	10%	\$1,059,938	\$197.78
Women's Apparel	\$19,660,343	66	5%	\$983,017	\$172.99	5,683	10%	\$1,966,034	\$191.20
Children's/Infants' Apparel	\$8,946,151	64	5%	\$447,308	\$145.21	3,080	10%	\$894,615	\$160.49
Footwear	\$10,280,256	67	5%	\$514,013	\$150.14	3,424	10%	\$1,028,026	\$165.94
Watches & Jewelry	\$4,472,845	59	5%	\$223,642	\$298.52	749	10%	\$447,285	\$329.94
Restaurants	\$51,126,954	65	5%	\$2,556,348	\$200.66	12,740	10%	\$5,112,695	\$221.78
Books & Periodicals	\$5,518,169	66	5%	\$275,908	\$177.99	1,550	10%	\$551,817	\$196.73
Cameras & Equipment	\$2,863,562	64	5%	\$143,178	\$266.33	538	10%	\$286,356	\$294.37
Luggage	\$272,635	58	5%	\$13,632	\$210.63	65	10%	\$27,264	\$232.81
Optical Goods	\$1,916,955	64	5%	\$95,848	\$194.55	493	10%	\$191,696	\$215.03
Pets & Supplies	\$6,230,346	60	5%	\$311,517	\$115.43	2,699	10%	\$623,035	\$127.59
Sporting Goods	\$4,554,712	62	5%	\$227,736	\$145.06	1,570	10%	\$455,471	\$160.33
Games & Toys	\$4,665,142	63	5%	\$233,257	\$130.38	1,789	10%	\$466,514	\$144.10
HOUSEHOLD PRODUCTS									
Groceries	\$96,617,790	66	5%	\$4,830,890	\$311.72	15,498	10%	\$9,661,779	\$344.54
Alcoholic Beverages	\$9,361,209	66	5%	\$468,060	\$203.60	2,299	10%	\$936,121	\$225.04
Home Improvement	\$15,870,322	65	5%	\$793,516	\$154.61	5,132	10%	\$1,587,032	\$170.89
Major Appliances	\$5,326,172	62	5%	\$266,309	\$177.28	1,502	10%	\$532,617	\$195.94
Television & Sound Equipment	\$19,555,636	66	5%	\$977,782	\$195.85	4,993	10%	\$1,955,564	\$216.47
Furniture	\$11,547,894	62	5%	\$577,395	\$137.64	4,195	10%	\$1,154,789	\$152.12
Other Household Furnishings	\$24,510,237	61	5%	\$1,225,512	\$136.27	8,993	10%	\$2,451,024	\$150.61
Personal Computers	\$5,720,478	60	5%	\$286,024	\$137.27	2,084	10%	\$572,048	\$150.61
Lawn & Garden	\$7,271,647	60	5%	\$363,582	\$138.27	2,630	10%	\$727,165	\$151.61
PERSONAL SERVICES									
Theater & Movies	\$2,804,539	64	5%	\$140,227	\$57.91	2,421	10%	\$280,454	\$64.01
Video Rental	\$1,354,732	64	5%	\$67,737	\$81.87	827	10%	\$135,473	\$90.49
TOTAL									
Total Expenditures****	\$1,128,386,907	63							

* Source: CACI Marketing Systems

** Spending potential index measures the amount spent for a product compared to the national average of 100. For example, an index of 105 indicates spending patterns are 5% greater than the national average.

*** Source: Urban Land Institute

**** Includes items not listed above, such as housing, utilities, and transportation

Retail Lease Rates

Retail lease rates in the Near Eastside study area were difficult to determine because many businesses own their buildings. Discussions with area real estate professionals provided lease rates at nearby retail areas. Retail spaces on Virginia Avenue south of the study area have gross leases of approximately \$2 to \$8 per square foot. The lower end of this range is expected to be increased significantly later this year. The smallest spaces at Linwood Square, which is approximately 1/3 mile east of Sherman on 10th Street, are currently \$10 to \$12 for triple net leases. After the renovation of the center is complete the lease rates will increase to \$14 to \$17 per square foot.

Retail lease rates in Downtown vary considerably. Premier space such as that at Circle Centre Mall costs approximately \$55 per square foot; however street level space elsewhere in Downtown is much less costly—approximately \$25 per square foot. Given these prices, these types of space are probably not in competition with Near Eastside retail space. Some outlying areas of Downtown such as Massachusetts Avenue offer more affordable space in the range of \$9 to \$18 per square foot.

Property values in the Near Eastside Neighborhood vary significantly by street. Washington Street has the highest values. As of May 2001, vacant land was on the market for \$95,000 to \$450,000 per acre. Prices on 10th Street are estimated at \$85,000 to \$250,000 per acre depending upon location along the corridor. Property prices on Michigan and New York streets are the lowest, estimated at \$85,000 or less per acre for vacant land.

The relatively low property costs in the Near Eastside Neighborhood provide opportunities for a variety of development types from housing to commercial uses. The relatively low costs may help the area compete with Downtown for lower cost retailers or retailers that want to market to Downtown in addition to the Near Eastside Neighborhood.

Resident Survey Results

The Near Eastside Neighborhood Resident Survey attempted to gather information on consumer habits, needs and retail likes/dislikes of neighborhood residents. The survey also attempted to gain basic economic and social information from residents in order to validate or challenge the demographic profile presented by CACI. Unfortunately, the success of the survey could be considered marginal because only 69 residents responded. More than 600 surveys were distributed.

Excess Retail Demand

	Current Supply	Neighborhood Demand & Capture	Extended Demand & Capture	Total Space Demand	Excess Demand
Restaurant	48,900	19,599 25%	12,740 5%	32,339	-16,561
Groceries/convenience stores	57,600	24,155 25%	15,498 5%	39,653	-17,947
Furniture/major appliances	19,200	22,179 25%	14,690 5%	36,869	17,669
Home improvement	18,600	11,447 25%	7,762 5%	19,209	609
Electronics	16,800	10,971 25%	7,076 5%	18,047	1,247
Video Rental	0	1,325 25%	827 5%	2,152	2,152
Apparel	9,000	23,609 25%	15,148 5%	38,757	29,757
Pet Supply	2,500	4,039 25%	2,699 5%	6,738	4,238
Books	1,000	2,320 25%	1,550 5%	3,870	2,870
Recreation	500	5,157 25%	3,359 5%	8,516	8,016
Total	174,100	124,801	81,349	206,150	32,050

Note: grocery and convenience stores are combined in this analysis because readily available data provides an indication of the demand for food which is met by both grocery and convenience stores; although the supply of existing space could be separated, this study was unable to determine what proportion of demand is being met by each type of store.

Although no particular neighborhood had a substantial number of participants, the highest percentage (21%) of respondents live in Woodruff Place; 17% are from Arsenal Heights.

The largest percentage (28%) of respondents indicated that they work in other areas than the Near Eastside or Downtown. Twenty-four percent said they worked Downtown; 21% said they work in the Near Eastside. Twenty percent of all respondents work in the service sector. Nineteen percent of respondents work in executive/ management; 26% of respondents are professionals and another 14% percent are retired.

Forty percent of respondents said they have two members in their household. Sixteen percent said they have one member in their household and 19% have four members. Twenty-eight percent of respondents are between the ages of 39 and 48. Eighty-six percent of respondents are white.

Seventy-eight percent own their home. Eighty-nine percent own a motor vehicle. Household incomes are evenly spread among income ranges with 23% earning less than \$25,000, 23% earning \$25,000 to \$49,999, 23% earning \$50,000 to \$74,999, and 31% earning \$75,000 or more.

Most of the respondents shop in and around the neighborhood for food, medicine, auto supplies, hair care, and video rentals. They go outside the neighborhood to malls or commercial centers for hardware, clothing, and shoes. Most do their banking Downtown or in other areas. Sixty-four percent of respondents visit neighborhood fast food restaurants five times or less a month, and 49% believe additional need exists for these services. Seventy-five percent of respondents visit neighborhood sit-down restaurants five times or less each month, and 80% think additional need exists for these services. Eighty-five percent of respondents use neighborhood delivery or take-out restaurant establishments five times or less each month, and 60% think additional need exists for these services. Ninety-one percent of respondents use neighborhood bakeries and coffee shops five times or less each month, yet 74% think there is additional need for these services.

'There are inner-city neighborhoods with ample disposable income that are not being served. This is a huge opportunity for us because there's a great need for our services. This expansion can help us obtain a much larger share of the vision care business.'

Jerry Darnell, Vice President of Franchising for Sterling Optical

Seventy-four percent believe there is an additional need for grocery stores. Fifty-seven percent believe no additional need exists for convenience stores. Ninety-eight percent of respondents use neighborhood printing and office supply services five times or less each month; 67% think there is additional need for these services. Eighty-four percent of respondents use neighborhood banks and ATMs five times or less a month and 64% think there is an additional need for more banking services. Nearly all respondents use neighborhood dry cleaning services fewer than five times a month.

Twenty-six percent of respondents would not like to see more liquor stores and bars. Other uses residents mentioned they would not like to see include pawn shops/ check cashing, rent-to-own stores, and convenience stores.

Respondents believe that commercial establishments within the Near Eastside are generally average to poor at meeting daily shopping needs, keeping their premises clean and maintained, providing adequate customer parking, and having a positive impact on nearby residences. In general, respondents do not use the restaurants and retail services in the neighborhood more than 5 times per month, and they think additional need exists for most types of restaurants and retail businesses.

Conclusions from Market Analysis

The total expenditures by the residents of the Neighborhood Trade Area are estimated to be \$344 million. The Extended Trade Area residents add an additional \$1.1 billion in expenditures. These estimates translate into considerable potential retail spending power. The neighborhood already supports a significant amount of retail and restaurant space; however, the services, for the most part, are scattered throughout rather than concentrated in defined retail districts/centers. Based on a comparison of retail supply and demand, the neighborhood could likely support additional retail services. The types of space most likely to succeed are apparel, furniture and major appliances, sporting goods, games and toys, and pet supplies.

If the Near Eastside can use its relatively low land prices to attract businesses that cater to the Downtown market, then the possibilities for additional retail development increase, especially for the west side of the neighborhood. A grocery store and restaurants, especially fast food establishments that want drive-thru windows may be appropriate on Washington Street near Downtown. These businesses could cater to the neighborhood in addition to the growing Downtown residential market and the strong traffic volumes of 25,000 vehicles per day along Washington Street.





chapter 5

development opportunities

While the market research indicated the potential for additional retail services, it may not tell the whole story. Oftentimes in inner city business districts, looking only 'at the numbers' does not immediately lead to a typical retail development strategy. Retailers and developers have traditionally utilized a model of targeting areas with high household incomes and/or extraordinary traffic volumes for their site selections. Knowing this tendency leaders of the Near Eastside neighborhoods can capitalize on a number of economic development opportunities that may allow the area to attract businesses and investment in a new way if they have an agreed-upon and focused development strategy. The recommendations that follow revolve around capitalizing on existing resources to lay the groundwork for the creation of a more compelling retail marketplace.

One of the best ways to create an attractive retail climate is to increase the customer base by adding more residents and continually making the area attractive as a residential choice. The adage that 'retail follows residential' has proven itself over and over again. Fortunately, as the price for Downtown housing continues to escalate, adjacent neighborhoods will benefit from those seeking more affordable, but still near-Downtown, housing. Woodruff Place, Cottage Home, and Windsor Park have already benefited from investment that has made the areas more attractive residential neighborhood options.

In addition to the notion that retail development follows residential development, a number of other key assumptions were discussed with the NESCO Weed and Seed Economic Development Sub-Committee. Those assumptions are listed on page 24.

Although a number of strengths exist in the Near Eastside neighborhoods, a few are particularly relevant for leaders to highlight when promoting business investment opportunities:

- Opportunity A: High-Traffic Corridors
- Opportunity B: Proximity to Downtown
- Opportunity C: Evidence of Entrepreneurship
- Opportunity D: Inner City Buying Potential
- Opportunity E: New Markets Tax Credits

The remainder of this chapter is organized to outline the above economic development opportunities and proposed responses to them. *Chapter Six* identifies target development areas which could accommodate retail and other uses and presents a development strategy and action steps for each area.

Opportunity A: High-Traffic Corridors

The Near Eastside is positioned to benefit from traffic going to and from Downtown. The primary recipients of this traffic are the east-west streets of Washington, New York, Michigan, and 10th. Those four streets combined carry more than 65,000 cars each day, with Washington Street being the most heavily traveled. New York and Michigan streets carry a combined 25,800 cars/day but because New York carries traffic out of Downtown and Michigan carries traffic into Downtown, their peak travel times occur in the mornings and evenings respectively. 10th Street is a two-way street; however, traffic volumes are only 15,500 cars/day.



Key Assumptions

The Near Eastside Neighborhood has existing retail and service strengths that could be clustered to create a more pronounced retail environment.

Some existing commercial areas may be better utilized if converted to residential use.

The west side of the neighborhood is heavily influenced by Downtown.

An improved retail service center could attract the resident and commuter customer base.

Because of traffic patterns, retail corridors will most likely occur on east-west streets.

New York and Michigan streets may be less attractive retail corridors because they are one-way streets.

Washington Street provides the best retail opportunity because it is two-way, has high average daily traffic counts, and is a significant thoroughfare.

With lower traffic volumes, 10th Street may host more neighborhood-oriented or a special retail environment. Retailers may need 'soft' equity/financial support while the market proves itself.

The Near Eastside retail climate would be improved by an active promotion/marketing of the area's opportunities.

As a comparison, other streets within the metropolitan area that have levels of traffic similar to Washington Street are 96th Street east of Keystone Avenue, Meridian Street between 73rd and 86th streets, Meridian Street between 38th and 46th streets, Lafayette Road between 30th and 38th streets, Shadeland Avenue between 30th and 46th Streets, Keystone Avenue between Hanna and Troy avenues, and Madison Avenue between Stop 11 and Edgewood Avenue.

As the Market Square Arena site is redeveloped and, if the access ramp from I-65 to Market Street removed, the traffic patterns may be altered; however, there is little indication that the existing one-way pair system on Michigan and New York streets would be changed.

Opportunity A: Responses

As a result of the different traffic volumes and peak travel times, each of the east-west corridors can play a different role in the overall development strategy for the Near Eastside. The traffic volume on Washington Street of nearly 25,000 cars/day certainly makes the corridor a candidate for retail development. Retailers typically look for average daily traffic counts that approach 20,000 cars/day for their site development activities. As such, Washington Street should be a primary focus area for encouraging retail activity.

As a more intimate and lower capacity street, 10th Street can play a particularly distinctive role in the neighborhood. In contrast to Washington Street, 10th Street has a more pedestrian-friendly scale and could evolve into a much more pedestrian-friendly corridor. Buildings adjacent to 10th Street are generally located near the sidewalk whereas those in some areas on Washington are pushed toward the rear of the site to accommodate surface parking lots. The depth of the lots on 10th Street are more shallow than those on the south side of Washington which results in a scale of building that is more comfortable to pedestrians. The character of this street is such that a different development strategy—one that focuses on creating a distinctive sense of place that consists of smaller scale services and shops—is warranted.

The one-way traffic on New York and Michigan streets, to a certain extent, presents limited access to the corridors' business establishments. As such, their role as retail corridors will likely be less than that of Washington or 10th streets. This fact, in conjunction with the high retail vacancy rates throughout the neighborhood suggests that investment along these two corridors may better serve the overall area if it is directed toward residential or other development activities.

Opportunity B: Proximity to Downtown

The obvious reason for the traffic volumes described above is the Near Eastside neighborhoods' proximity to Downtown. The study area is adjacent to and east of Downtown Indianapolis, less than a mile from Monument Circle and within a five-minute drive. Connections to Downtown are provided by 10th, Michigan, New York, and Washington streets. Access to this neighborhood from Interstate 65/70 is at Market Street although it is somewhat obstructed. From an economic development perspective, the Near Eastside has the potential to benefit from this physical relationship not only as a result of traffic, but by providing a service role—both to businesses within Downtown and to the employees of those businesses. Because Downtown functions as the employment center of the metropolitan area, the Near Eastside is, in effect, at a crossroads of traffic and activity. Commuters from all directions come into Downtown daily, expanding the potential customer base for Near Eastside businesses.

Just as the Near Eastside can offer more affordable housing alternatives to Downtown, Washington Street, which can handle significant traffic volumes, could provide office and commercial service uses with space competitively priced in relation to Downtown options. An excellent example of the merits of this strategy is apparent in the success of the Firehouse Image Center located on Washington Street. This commercial service firm has a significant Downtown customer base but has benefited from the foresight decades ago to invest in the site and historic building it still occupies today. The Firehouse complex, in conjunction with other anchors existent on Washington Street such as Horner Electric, makes this area even more attractive as a 'back office' and retail corridor adjacent to Downtown because those anchors have made the investment that creates stability in the area.

Opportunity B: Responses

The potential connectivity and synergy with Downtown becomes more likely in light of the future redevelopment of the Market Square Arena site. The opening up of this site for development could

make a tremendous impact on the Near Eastside if the appropriate uses and design are employed. Near Eastside leaders have already stated the opportunity that is created by this redevelopment effort and are eager to be involved in considering alternatives.

In addition to monitoring progress on the Market Square site, promoters of the Near Eastside should turn their attentions to the Washington Street corridor and to identifying development opportunities toward the west end of the neighborhood that could reinforce connectivity with Downtown.

Finally, north of Washington Street, the synergy with Downtown can be reinforced through a continuation of the housing investment and stabilization that has been ongoing. As described earlier, one of the strengths of the Near Eastside is in its role as a near-Downtown neighborhood and its location close to amenities at a more affordable price; therefore, maximizing sites for providing additional housing is an important long-term strategy. In addition, identifying locations for improving both pedestrian and vehicular connections to Downtown will help to give residents and potential residents the feeling that they truly are living in Downtown's 'front yard.' One such opportunity is present in the Monon Trail which is currently planned to end at 10th Street just east of the interstate. A number of options for connecting that terminus into the Downtown pedestrian network have been proposed and will be important tools for more strongly linking the Near Eastside and Downtown.



Opportunity C: Evidence of Entrepreneurship

The Near Eastside can be characterized by a pronounced visibility of entrepreneurial enterprises. The evidence of entrepreneurship dates back at least to the 1970s with the investment in the Firehouse Image Center complex, but has continued with strong neighborhood anchors such as El Sol which attracts a customer base outside of the neighborhood. More recently, additional Mexican restaurants and a grocery have become establishments of the neighborhood. Also, the several antique and second-hand stores in the neighborhood are further testament to the independent business presence and its potential role in a retail development strategy for the Near Eastside.

In addition, as part of this study effort, a number of independent business owners were interviewed and indicated that they own their buildings in addition to the businesses housed within them. Unfortunately some of those also said that it was property ownership only that was keeping their businesses in the neighborhood. Apparently, some of the local business enterprising experience could easily be lost if conditions do not improve.

Opportunity C: Responses

The entrepreneurial talent in the Near Eastside is a resource that should be tapped through the provision of additional small business assistance, mentoring, financial resources, and to the extent possible, collective advertising, promoting, events, etc. Outside of Washington Street and the Old National Road Business Association, the lack of a well-established business leadership group in the Near Eastside Neighborhood undermines the neighborhood business environment. Fortunately, NESCO has received a grant to assist with the creation of a 10th Street Civic Association which will help to organize business and property owners along that corridor.

These organizations are important tools for sharing information, discussing problems, and devising strategies; however, it is imperative that a concerted effort to keep people involved and committed to the group is maintained. Commercial districts that are outside of malls or single-site

developments may be at a disadvantage if the individual businesses within them do not pool resources to promote the area. During the planning process for this study, it was difficult to sustain a regular group of more than two or three



people to act as a Steering Committee. This fact should alert neighborhood leaders to the challenge ahead in creating a new business organization and consideration should be given to creating a staff position that could be responsible for acting as a resource to business owners.

Franchise expansion is another economic development strategy that could play a role in the Near Eastside neighborhoods since they are already showing evidence of entrepreneurship. Over the past few decades, franchising in the United States has experienced rapid growth, not only in consumer-oriented franchises such as fast food, but also in commercial services such as commercial cleaning, printing, and mailing. Commercial service franchising represents an important economic opportunity for several reasons: job creation, income generation, strengthening of the general business infrastructure, in addition to providing opportunities to enhance entrepreneurship. Established franchises provide new business owners with a proven business model that reduces risk, increases access to capital, and provides training and marketing support.

Opportunity D: Inner City Buying Potential

The U.S. Department of Housing and Urban Development (HUD), the Initiative for a Competitive Inner City (ICIC), and others have been promot-

ing the untapped opportunities for retailers in central cities. Research conducted by ICIC and the Boston Consulting Group in 1998 revealed that inner cities possess more than \$85 billion in annual retail spending power, \$21 billion of which is unmet locally. This is larger than the formal retail market in Mexico. Retail demand per inner city square mile is often two to six times greater than each metro area square mile and inner city households often spend more on apparel and groceries than the average U.S. household (source: *Inner-City Shoppers Make Cents (and Dollars)*, prepared by ICIC in partnership with Price Waterhouse Coopers).

In particular, the income density in the Near Eastside Neighborhood Trade Area is more than \$77 million/square mile; in the Extended Trade Area, the income density rises to nearly \$107 million/square mile. Income density, combined with the proportional spending characteristics of inner city households, results in estimates that the Near Eastside neighborhoods could support retail services with more than \$54 million in annual spending (sources: U.S. Department of Labor Consumer Expenditure Survey, 1999 for household spending and CACI Marketing Systems for neighborhood income estimates).

Further illustrating the strength of inner city buying potential is a November 2000 study of four Chicago community areas by the Washington D.C.-based Social Compact, a nonprofit coalition of corporate leaders pushing private investment in cities, that found significantly more population and spending power than previous studies had found. The basis of the Social Compact's work is the belief that traditional evaluation tools used to measure the economic health of inner-city neighborhoods are flawed. The group contends that many of those tools, such as statistical averaging across zip codes and across three-mile rings from community centers, may work in homogeneous suburbs but fail in diverse city neighborhoods.

Market research firms (such as those utilized to quickly and economically gather data for this study) generally utilize cluster and ranking sys-

tems of neighborhoods that emphasize average household incomes as assets and overlook the strengths of household densities and income concentrations that make central city neighborhoods strong markets. In addition, while central city residents may have lower family incomes than suburban residents, they typically spend much of their income on consumer purchases. This tendency allows for a strong base of retail purchasing power.

Studies have also found that there can also be discrepancies between data utilized by national market research firms and more timely and accurate information collected from local and state governments (source: *Exposing Urban Legends: The Real Purchasing Power of Central City Neighborhoods*, John Pawasarat and Lois M. Quinn, University of Wisconsin-Milwaukee Employment and Training Institute, June 2001). In fact, data gathered from national sources for this Near Eastside study indicated that the Hispanic population in the neighborhood was less than 3% which did not appear to accurately reflect the demographics apparent to the project team and interviewees. Accessing this data is important, however, because developers and retailers often utilize these same tools. The work done as part of the market analysis for this report is the type of information that retailers understand. What neighborhood and City leaders can now do is take the next step to describe the neighborhood more accurately.

A few national retailers are starting to focus on the untapped inner city markets and ethnic sub-sets of those markets. For example, discount retailer Target in some

of its markets is beginning to develop strategies for one of the fastest growing markets in the country—Hispanic immigrants. Target developed a prototype store aimed at the predominant Hispanic population in City of Commerce, California. Annual sales there have increased 17%, compared to a 7.2% increase for all of the chain's stores. To

Estimates indicate that the Near Eastside Neighborhood could support retail services with more than \$54 million in annual spending.

cultivate this market, Target consulted community leaders on consumer preferences and, as a result, stocks difficult-to-find specialty items such as Fabuloso cleanser, Suavitel fabric softener, and La Bella hair care products. Target and Sear's are expanding this targeted sales approach across the country, using Spanish-language magazines, Web sites, and cultural events and promotions.

Opportunity D: Responses

A variety of local data sources (such as city health department records, school census, state income tax filings, city property tax information, state motor vehicle files, state Department of Revenue, etc.) can be utilized to 'fact check' reports on their neighborhoods prepared by national marketing databases and firms. Since most developers rely on detailed maps of population density, home ownership, household income, automobile ownership, and crime statistics from commercial firms, an organized city neighborhood may be able to more successfully compete for development activity and attract retailers by maintaining an accurate database of demographic information that shows where the national databases are lacking and that educates retailers, real estate professionals, and developers about local opportunities. Investing in this type of 'data infrastructure' is not inexpensive; however, once a system for the collection of information is established, records can be easily updated.

For example, the City of Milwaukee in conjunction with the Employment and Training Institute (ETI) at the University of Wisconsin-Milwaukee developed a methodology to describe the income concentration and spending power in the city's commercial districts. Materials were collected to compare the detailed income tax filing data and other current information on residents to spending patterns, found by the Bureau of Labor Statistics, for income groups in Midwest cities of comparable size to Milwaukee. The work of ETI found that some of the "strongest retail markets in the metropolitan area have been ignored in part due to misconceptions about central city in-

come status, persistent 'urban legends' about the absence of workers in central city neighborhoods, and marketing stereotypes promulgated by commercial marketing firms" (source: *Purchasing Power of Milwaukee Commercial Districts*, John Pawasarat and Lois M. Quinn, Employment and Training Institute, University Outreach, University of Wisconsin-Milwaukee, June 2001).

It is unclear to what extent there may or may not be information discrepancies relevant to the Near Eastside neighborhoods or other inner city neighborhoods within Marion County; however, studies from throughout the country tend to indicate that until an investment is made to gather more accurate local information, there may continue to be a perceived disadvantage to retail development in the Near Eastside neighborhoods. Information collected



as part of this study from a national marketing firm stated that the Hispanic population of the neighborhood was only 3%. That figure was questioned by everyone involved in the study. This fact suggests that collecting additional information from local sources may serve to paint a more accurate picture of the neighborhood and its retail development potential.

Fortunately, a good foundation has been created in the Social Assets and Vulnerabilities Indicators (SAVI) for Central Indiana project that has been developed and maintained by the Polis Center in partnership with United Way/Community Service Council. SAVI collects, organizes, and presents information on community assets such as schools, libraries, churches, hospitals, and community centers. It also include social demographic information such as census, health, education, criminal justice, welfare, and other data that can point out such vulnerabilities as neighborhoods with high levels of crime, unemployment, and welfare recipients. Using geographic information system (GIS) technology, SAVI creates a dynamic database, continually updated, that is drawn from a large variety of sources.

Opportunity E: New Markets Tax Credit

Enacted on December 21, 2000, the New Markets Tax Credit (NMTC) is designed to encourage private investors who may never have considered investing in neglected communities to do so. The tax credits become a way of generating capital for a project in a similar fashion to the successful low-income housing tax credit. The money the non-profit receives can then be spent on a project within the neighborhood.

The non-profit participating in the NMTC process must be a qualified community development entity (CDE). A CDE is an organization that:

- Has the primary mission of serving, or providing investment capital for, low-income communities or low-income persons.
- Maintains accountability to residents of low-income communities through representation on a governing or advisory board.
- Receives certification as a CDE from the Department of Treasury.

Community development financial institutions (CDFIs) and specialized small business investment companies (SSBICs) automatically qualify as CDEs.

An organization will apply to the CDFI Fund to be certified as a CDE and to receive NMTC allocations. The credits will be awarded competitively based on a CDE's track record and other criteria to be identified in the regulations. CDEs that have secured NMTC allocations will seek private equity investors.

Opportunity E: Responses

Investors in a qualified community development entity (CDE) would receive a tax credit for their investment — worth 30% of the amount invested (net present value) — over seven years. Once a CDE secures an allocation of credits, it would sell the tax credit certificates to private investors. In return, investors would receive a tax credit certificate from the CDE to attach to their federal income tax forms—claiming a 5% tax credit for the first three years and a 6% credit in the last four years.

The CDE would then use the capital generated from the sale to provide loans, equity, and other forms of credit to qualified low-income community businesses, including non-profit corporations, in targeted distressed areas.

The CDE must use substantially all the capital generated from the sale of NMTC equity to fund loans to, or equity investments in, for-profit or non-profit businesses that are operating in low-income census tracts (estimated to be approximately 33% to 40% of all U.S. census tracts). Eligible businesses include commercial real estate projects, but exclude rental of residential properties. CDEs can also use the proceeds to invest in or lend to other CDEs or purchase loans or equity investments from other CDEs.

In order for the Near Eastside to prepare to utilize the NMTC as a tool, neighborhood leaders should study the details of the tax credit program and identify the best group to act as a CDE. This group could create an alliance with an accounting professional to determine how best to take advantage of the NMTC.

Action Steps for Organizing Around the Development Opportunities

The opportunities presented above provide a foundation for how the Near Eastside can strategically position itself to attract retail investment over the long-term. These 'big picture' strategies may be best achieved by focusing on several tasks described below:



Task DO.1: Organize group to champion (or finalize) recommendations described in this plan.

Task DO.2: Organize 10th Street business association.

Task DO.3: Present plan to NESCO for adoption; in partnership with NESCO, present plan to Metropolitan Development Commission and request support on certain tasks.

Task DO.4: Create group (or assign to an existing group) the responsibility for monitoring implementation of this plan and promoting the neighborhood to retailers, developers, etc.

Task DO.5: Consider creating a new position to focus on coordinating and communicating with businesses.

Task DO.6: Stay actively involved with and informed about plans for the reuse of the Market Square Arena site.

Task DO.7: Investigate rezoning of portions of Michigan and New York to encourage residential development and discourage commercial development.

Task DO.8: Develop partnerships to collect and publish current data on neighborhood demographics.

Task DO.9: Establish database of neighborhood information; meet with brokers to highlight accurate neighborhood conditions; request suggestions for how to package information.

Task DO.10: Create partnership with the broker to promote area.

Task DO.11: Publish promotional report highlighting neighborhood data at least annually.



Task DO.12: Gather and maintain current traffic counts along Washington Street. Although traffic is not typically measured for all streets annually, having up-to-date estimates for this street will be important for economic development and traffic management purposes.

Task DO.13: Identify group to receive designation as a CDE for utilization of New Markets Tax Credits; identify projects for use of this tool; prepare preliminary assessment of project economics utilizing tax credits and market the opportunity to developers.

Task DO.14: Host open house highlighting franchise opportunities.

Task DO.15: Continue NESCO business awards/annual luncheon program.

Task DO.16: Develop and promote small business assistance programs such as loans for facade improvement, working capital, etc.

chapter 6

retail development target areas

In conjunction with the longer-term activities described earlier, two sites were identified as part of this study as potential near-term development opportunities. A number of sites were considered but the two described below were identified because they best responded to the following key retail development strategies:

- Use Washington Street to attract commuters/downtown users and to serve the neighborhood population.
- Identify sub-districts for 'themed' retail services.

Retail Development Target Area A: Washington & State Streets

The site recommended as a candidate to attract commuters and downtown users, as well as neighborhood residents, is the area on both sides of Washington Street between Pine and State streets (see map following this page). Currently this is the area that is most closely related to and accessible from Downtown. As the Market Square Arena site is redeveloped, the Market Street thoroughfare may allow the entire area between Washington and Market streets to be repositioned to create a greater synergy between Downtown and the Near Eastside.

The area is not entirely vacant or even underutilized now which makes this target area a challenge; however, there are intersections—particularly the intersection of Washington and State—which could serve as starting points for development activities. In addition, a number of uses (such as Horner Electric, Firehouse and the multi-tenant buildings to the west of Firehouse,

Eastside Place, Police Department Credit Union, IKON Office Solutions, and others) exist within this target area. These uses could serve as anchors for new development around them. Indianapolis Public Schools and Ivy Tech's Automotive Technology Center are also major land uses in this stretch of Washington Street.

Based on the market research done for this study, the most likely services to consider at this location are apparel, furniture and major appliances, sporting goods, games and toys, and pet supplies. Additional restaurants in this area, especially toward the west end of Washington closer to Downtown, could also be candidates to occupy space. Although office space in Downtown is plentiful, the west end of Washington could provide space for smaller office and commercial service firms looking for affordable alternatives to Downtown. In addition, although 200,000 square feet of grocery space exists in the Near Eastside, the O'Malia's store on Alabama Street is the primary grocer serving the Downtown population.

As the Downtown residential population continues to grow, the need for an additional grocery store can be expected. The Near Eastside could benefit from this need by having a site proposal ready to market to developers. As such, even though this market study found that restaurant and grocery space is plentiful in the study area, the west end of Washington street could defy the assumption that there is no additional need for those by serving the Downtown and neighborhood markets.



The development objectives for the Washington Street target area would be to maximize the markets served by offering services for both commuters and residents. As such a number of key characteristics would probably be present along the corridor:

- Primarily vehicular-orientation but accessible from neighborhood.
- Containing mixed uses to 'extend' Downtown to the east.
- Containing commuter- and neighborhood-oriented uses (such as dry cleaner, video store, etc.).



Visual benchmark of potential new development on Washington Street.

Retail Development Target Area A: Action Steps

Task A.1: Hold meeting with property owners to discuss development objectives and status of individual properties.

Task A.2: Determine potential site configuration for near-term redevelopment.

Task A.3: Determine feasibility of land swap or title trades to consolidate additional properties.

Task A.4: Consider City designation as Redevelopment Area and package incentives (tax increment financing, tax credits, tax abatement) to assist with redevelopment.

Task A.5: Prepare request for proposals (RFP) or solicit development groups to construct commercial center.



Visual benchmark of potential new development on Washington Street.

**Retail Development Target Area B:
10th Street between Rural & Olney Streets**

Several areas of the Near Eastside were discussed as candidates for the development of a distinctive, specialty type of 'themed' retail district. The area that received the most support for this type of activity was along 10th Street east of the existing Kroger at Sterling Street. The greatest continuous stretch of retail is present between Rural and Olney streets (see map following this page). Although Michigan was an attractive alternative due to the existing business base, it was concluded that the scale of the street and the difficulty of providing parking made this a more difficult corridor for focused retail development activity.

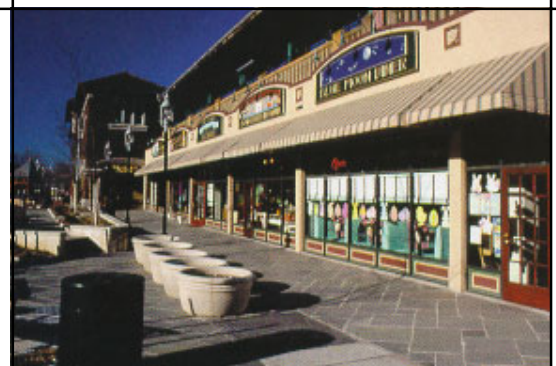
This target area and the type of development within it will be very different from that on Washington. One of the primary strengths of this area is its pedestrian-friendly character. To build off of this quality, a retail destination, at least initially, may have to be a relatively short distance that is comfortable to walk. Although the potential to create a unique, walkable retail destination exists in several places along 10th Street, a concentration of pedestrian-friendly retail uses exist between Gray and Tuxedo streets, creating a logical starting point. From a strategy implementation and prioritization of work, defining a manageable area to be the focus of initial efforts make sense. This 10th Street target area is also not a clean slate waiting for investment, so implementation of an improvement strategy on this site will require coordination with property owners and other ongoing activities. One of the critical issues to be addressed in the supporting retail development in this target area will be that of the Rivoli Theater. The potential influence of the theater – in either a renovated or blighted condition – should not be underestimated.

The expected mix of uses along 10th Street is intended to provide neighborhood services but also create a destination because of the specialty na-

ture of the stores located there. Currently there is a theme of antiques and second-hand items apparent along the street. This theme could be reinforced through the recruitment of additional stores with similar themes. Plans for the renovation of the Rivoli Theater as a facility with an arts education focus could make a tremendous impact on 10th Street and help to define a theme for the area. In addition, with the presence of several Hispanic businesses, the opportunity exists to consolidate those services in closer proximity to one another and promote a 'little Mexico' or similar type of ethnic-oriented district.

This target area along 10th Street may occur over a longer period of time than the target area on Washington where a large-scale commercial or mixed-use project is recommended. 10th Street should be considered as a 'Main Street' type of environment that fulfills the following objectives:

- Providing a pedestrian-oriented character with distinct sense of place.
- Offering a unique destination quality.
- Capitalizing on existing anchors.



Visual benchmark of potential new development on 10th Street.

Retail Development Target Area B: Action Steps

Task B.1: Create 10th Street business association.

Task B.2: Utilize discussions with business association to finalize development themes.

Task B.3: Formulate redevelopment strategy for the Rivoli Theatre.

Task B.4: Consider creation of a commercial district manager position to focus on area.

Task B.5: Prepare public improvements 'wish list.'

Task B.6: Create list of potential types of businesses that are complementary to desired themes.

Task B.7: Create inventory of available space and keep brokers regularly informed of vacancies.

Task B.8: Create business district incentive program such as facade improvements, design assistance, etc.

Task B.9: Create marketing program including map of area and services.



ACORN Groups

CACI uses a Classification of Residential Neighborhoods (ACORN) as a means of characterizing segments of neighborhood populations. Sixty-one lifestyle characteristics, such as income, age, and occupation, are used to determine the consumer behavior of residents. ACORN has nine general groups. Each group contains three to seven clusters for a total of 43 clusters. The clusters provide a classification system for predicting the purchasing habits of neighborhood residents. Many retailers and commercial developers use the ACORN classification system when making location decisions for retail investment.

In examining specific consumer group categories in the Neighborhood Trade Area, slightly more than 85% of the population falls under one of two clusters: "Low Income, Young and Old" and "Newly Formed Households". Those groups are also dominant in the Extended Trade Area, although in a lesser amount (55%). The next most common group in the Extended Trade Area is "Rustbelt Neighborhoods". All three clusters are defined as follows:

"Low Income, Young & Old" - This group consists of the very young and the elderly, who are supported by a relatively young working-age population. Nearly half of the households are single-parent or single-person. Their median age of 31.8 years indicates a gap between those under 35 and over 64 years. These racially diverse neighborhoods include whites, blacks, Hispanics, and American Indians.

Median household income of this ACORN group is \$22,500. Most housing for this group is older, built before 1950. At 13%, vacancy rates are relatively high while the median home value of \$44,500 is low. Single-family units, duplexes, and

quads account for most of the housing in these neighborhoods. Half are renter-occupied. These neighborhoods are urban, located in metropolitan areas and smaller cities throughout the country, with an especially high concentration in the Midwest.

Not surprisingly, "Low Income, Young & Old" is a dual consumer market with expenditures for young children and senior citizens. This group tends to buy children's vitamins, baby products, denture cleaner, over-the-counter medications, and home permanents.

"Newly Formed Households" - Young, newly formed households are characteristic of this market. While their median age is 33.9 years, many of them are between the ages of 20 and 34 years. The mix of household types includes single parents, single-person and shared households, in addition to a sizable percentage of married couple households with and without children. Eighty-five percent of this market is white.

With a population of more than 13 million, this group is a large market that comprises almost 5% of the U.S. population. These households are moderate-income; their median household income is \$35,300. Unemployment and poverty are low. Half work in the manufacturing and service industries.

"Newly Formed Households" offer affordable housing in older, single-family homes, and duplexes. Their median home value is \$73,500, 26% below the national figure. These neighborhoods can be found in the urban areas of any state, but most commonly in the smaller, metropolitan areas of Iowa, Kansas, Maine, Nebraska, New Hampshire,

Oregon, Rhode Island, Washington, South Dakota, and Wisconsin. Members of this group tend to visit zoos, use tobacco products, play cards, gamble at casinos, play the lottery, and go camping.

“Rustbelt Neighborhoods” - The population of “Rustbelt Neighborhoods” is stable, but aging. Younger people are leaving these areas while the older residents remain. Their median age of 39.6 years is an indication of the large concentration of senior householders. Nearly 20% are 65 years or older compared with approximately 14% for the entire U.S. These households are also typical of an older population: married couples, some with adult children living at home, and single-person households.

The economic vitality of these industrialized areas has waned. Nearly 40% of the population has retired so employment is below average. The remaining jobs are mainly in blue-collar, skilled, unskilled, and service occupations. Manufacturing remains the chief industry. Wages and Social Security produce a median household income of \$33,100.

“Rustbelt Neighborhoods” are located on older urban streets in metropolitan cities and smaller towns. Most homes are owner-occupied, single-family houses, but town and row houses are also common. The median home value of \$61,600 is relatively low. These communities can be found in urban areas throughout the United States, although the highest concentrations are around the Great Lakes in Pennsylvania, Ohio, and New York.

Members of this group tend to enjoy more sedate pastimes such as needlework, watching movies, mysteries, sitcoms, and daytime dramas on TV. They are conservative investors, more likely to have savings accounts, U.S. savings bonds, and certificates of deposit, than to own common or preferred stock. Purchases of denture cleaner, bifocals, over-the-counter and prescription medications, lottery tickets, and news tabloids indicate an older population.

appendix

Resident Survey



NEAR EASTSIDE NEIGHBORHOOD RESIDENT SURVEY



The City of Indianapolis and the Near Eastside Community Organization (NESCO) are in the process of analyzing commercial development opportunities in the Near Eastside Neighborhood. The boundaries of the Near Eastside Neighborhood are Washington Street, I-65/70, I-70, and Sherman Drive (see map at right). The following survey will assist the community in determining what commercial and retail uses are of greatest need or desired in the neighborhood. Your insights and opinions are greatly appreciated. All responses will be kept confidential.

Please return this survey to your neighborhood association president, Development Concepts, Inc. 200 S. Meridian St., Suite 410, Indianapolis, IN 46225, fax 262-9355, or drop it off at NESCO (John H. Boner Community Center) 2236 E 10th St. Indianapolis, IN 46201. The City and NESCO thank you for your assistance on this important initiative.

NEAR EASTSIDE NEIGHBORHOOD



1. In which neighborhood do you currently live?

<input type="checkbox"/> Woodruff Place	<input type="checkbox"/> Brookside	<input type="checkbox"/> Windsor Park	<input type="checkbox"/> Springdale
<input type="checkbox"/> Cottage Home	<input type="checkbox"/> Arsenal Heights	<input type="checkbox"/> Brookside Bunch	<input type="checkbox"/> Englewood
<input type="checkbox"/> Holy Cross/Westminster	<input type="checkbox"/> ABC	<input type="checkbox"/> TEAR	<input type="checkbox"/> RTMT
<input type="checkbox"/> Rivoli Park	<input type="checkbox"/> Other _____		

2. Where do you currently work?

<input type="checkbox"/> Downtown	<input type="checkbox"/> Near Eastside Neighborhood	<input type="checkbox"/> Indianapolis Eastside
<input type="checkbox"/> Retired/do not work	<input type="checkbox"/> Other (please specify) _____	

3. Who is your employer? _____

4. What is your occupation?

<input type="checkbox"/> Executive/Management	<input type="checkbox"/> Professional	<input type="checkbox"/> Technical	<input type="checkbox"/> Sales
<input type="checkbox"/> Clerical	<input type="checkbox"/> Operator/Laborer	<input type="checkbox"/> Service	<input type="checkbox"/> Retired

5. How many people, including yourself, live in your residence? _____

6. Do you own or rent your current residence?

<input type="checkbox"/> Own	<input type="checkbox"/> Rent
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7. Do you own a motor vehicle?

<input type="checkbox"/> Yes	<input type="checkbox"/> No
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8. How much do you estimate that your household spends on food away from home (restaurants, take-out, etc.) per week?

<input type="checkbox"/> Less than \$50	<input type="checkbox"/> \$50-\$100	<input type="checkbox"/> More than \$100
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9. Where do you primarily shop for the following goods and services? Please indicate stores and locations, i.e. Sears, Washington Square.

	Store(s)	Location
Groceries	_____	_____
Medicine	_____	_____
Clothing	_____	_____
Shoes	_____	_____
Hardware	_____	_____
Books	_____	_____
Furniture	_____	_____
Electronics	_____	_____
Auto Supplies	_____	_____
Hair Care	_____	_____
Video Rental	_____	_____
Bank	_____	_____

10. At which stores within the Near Eastside Neighborhood do you shop?

Store & Location	Times per month
_____	_____
_____	_____
_____	_____
_____	_____

11. How well do you think the commercial establishments in the Near Eastside Neighborhood do the following?

	<u>Very Well</u>	<u>Well</u>	<u>Average</u>	<u>Poor</u>	<u>Very Poor</u>
Meet your daily shopping needs?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Keep premises clean and well maintained?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Provide adequate customer parking?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Have a positive impact on nearby residences?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

12. Please answer both parts of this question. 1) Within the past 30 days, how often did you visit the following places within the Near Eastside Neighborhood? 2) How much need do you have for additional commercial services in the Near Eastside Neighborhood?

	<u>Part 1</u> How Often in Last 30 Days Did You Visit <i>Check One of these three</i>			<u>Part 2</u> Is There Additional Need? <i>Check one of these two</i>	
	Under 5 times	6-15 times	16+ times	No, there is no additional need for this	Yes, there is an additional need for this
A. Fast Food Restaurants	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
B. Sit down Restaurants	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

- | | | | | | |
|-----------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| C. Take-out/delivery food | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| D. Bakery/Coffee shop | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| E. Grocery store | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| F. Convenience store | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| G. Printing/Office supplies | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| H. Dry Cleaner/Laundry | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| I. Flower/Card shop | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| J. Clothing store | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| K. Drug store/Pharmacy | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| L. Book store | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| M. Electronics | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| N. Hair care/Barber | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| O. Hardware/Supplies/Paint | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| P. Video rental | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Q. Bank/ATM | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| R. Other _____ | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| S. Other _____ | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| T. Other _____ | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

13. Which of the places on the above list do you typically walk to from your home?

14. What types of stores or uses would you not like to see in the Near Eastside Neighborhood?

15. What is your current annual household income?

- | | |
|---|---|
| <input type="checkbox"/> Less than \$25,000 | <input type="checkbox"/> \$25,000 to \$49,999 |
| <input type="checkbox"/> \$50,000 to \$74,999 | <input type="checkbox"/> \$75,000 + |

16. What is your age? _____

17. What is your race? _____

18. What is your sex? M F

Thank you very much for your participation in this survey. Individual results will be kept confidential. Please attend one of our upcoming neighborhood meetings to learn the results. For more information call Development Concepts, Inc. at 262-9347.

appendix

Resident Survey Results

