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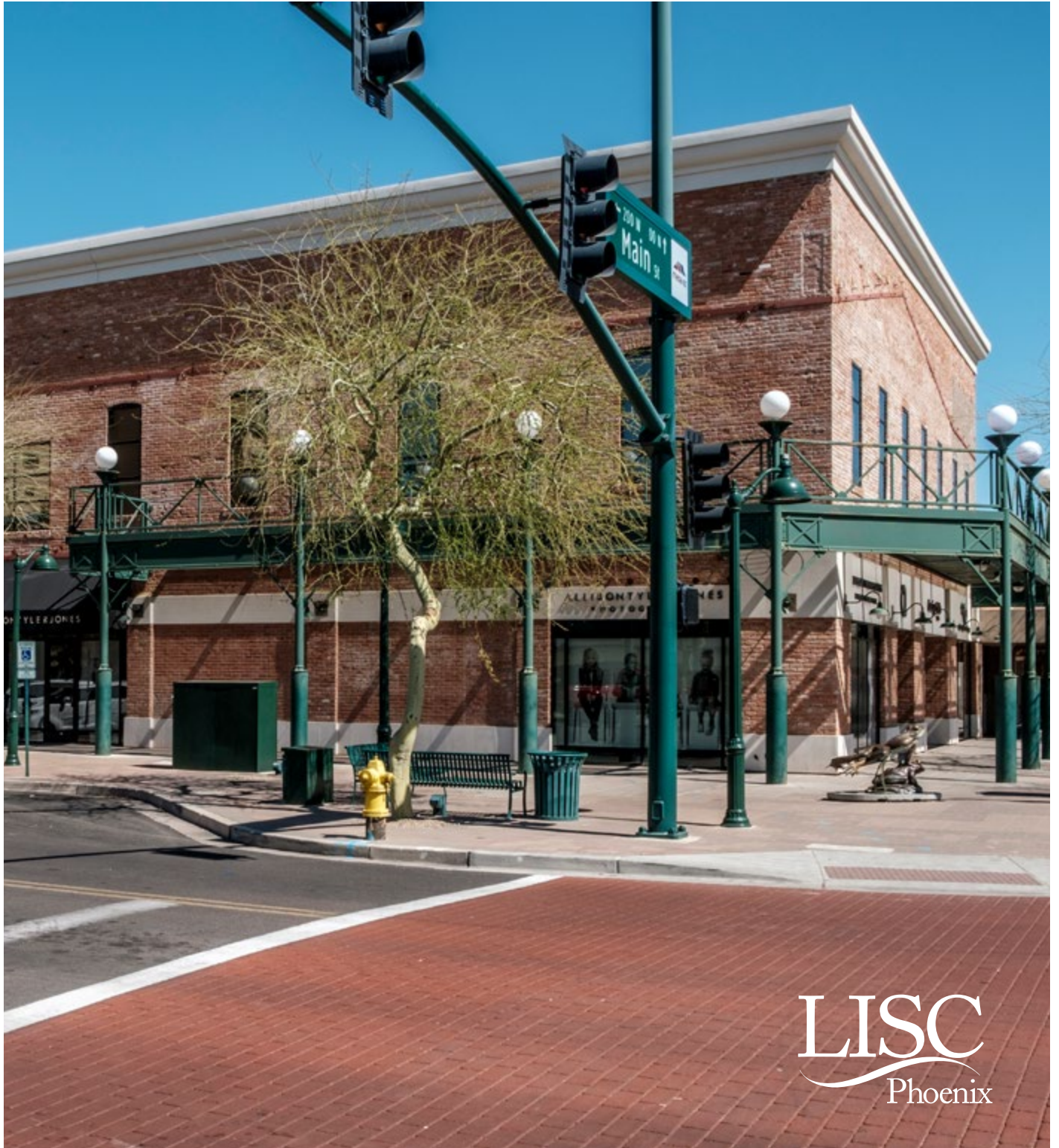
**AN ASSESSMENT OF LISC PHOENIX INVESTMENTS IN
COMMERCIAL CORRIDORS IN PHOENIX, MESA, & TEMPE**

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Executive Summary

Introduction: LISC Phoenix, MetroEdge, and Corridor Initiatives

LISC MetroEdge launched in 2005 to seed and support development and economic growth along commercial corridors in low- and moderate-income neighborhoods and was selected in 2010-2011 to provide comprehensive support to LISC Phoenix.

The “Corridors of Retail Excellence” (CORE) initiative focused on Main Street with the West Mesa CDC. In the Sunnyslope area of Phoenix, the focus was on Hatcher Road on behalf of Desert Mission.

Services included the use of local and national data to highlight investment potential and market readiness, an assessment that included on-the-ground surveys, and collaboration to help communities develop strategies and action plans to improve commercial areas.

Following completion of this effort, in early 2012, MetroEdge provided periodic support to LISC Phoenix as it selected NEDCO to implement the initial study recommendations.

With continuing support from State Farm, NEDCO and LISC Phoenix next sought to reinvigorate Apache Boulevard in Tempe. MetroEdge was engaged to perform a similar assessment and technical assistance beginning in 2014.

With support from NeighborWorks America and LISC Phoenix, MetroEdge was asked by Trellis to complete an initial assessment for McDowell Road in Phoenix.

While supporting ongoing work in Mesa, Tempe and Phoenix, LISC Phoenix leveraged the light rail to respond to interest in a “transit village” at the newly opened 19th and Camelback Station in Phoenix. LISC MetroEdge began the Camelback analysis in 2016 with a second phase focused on implementation strategies in 2017.

Background and Highlights

LISC Phoenix began investing in the Main Street Mesa commercial corridor with support of State Farm in 2008. Soon after, Valley Metro opened its first light rail line, with plans to expand throughout the Valley of the Sun. LISC leaders saw transit-oriented development as an important key to future development and support for low-income communities.

As MetroEdge completed market profiles, strategy development, and local stories for Downtown Mesa and Hatcher Road/Sunnyslope in 2011-2012, LISC and Raza Development Fund announced a \$20 million Sustainable Communities Transit-Oriented Development Fund to support housing and mixed use projects on the light rail.

In 2011-2012, with light rail construction imminent in Mesa and recently completed in Tempe, LISC and State Farm began supporting NEDCO to focus on corridor redevelopment on Apache Blvd in Tempe and Main Street in Mesa.

In 2013-2014, rail construction started in Downtown Mesa. LISC completed a strategic plan with its priority: “Our Future is on the Line”. MetroEdge began a Market Scan for Apache Blvd Tempe, and NEDCO, the City of Mesa and partners implemented strategies to support business on the Main Street corridor during construction.

LISC and Raza Development Fund renewed their commitment with announcement of a new \$30 million TOD fund in 2015. Light rail opened in Downtown Mesa. MetroEdge moved on to work with Trellis to complete analysis and strategies for the McDowell corridor in Phoenix and in 2016 to perform an initial assessment of Camelback Road.

In 2017, LISC Phoenix asked MetroEdge to work with IRC on Camelback Road in Phoenix to complete a Market Profile and strategies for the 19th and Camelback transit corridor.

In 2016-2017. LISC Phoenix expanded its support to include staff and project funding to Trellis, IRC, and Local First Arizona, and MetroEdge provided ongoing coaching for corridor managers in each of the target communities.

Market Observations

Initial progress on the corridors was slowed because the national and local economies were just beginning to emerge from the Great Recession.

The population increased in four of the five corridors studied. The McDowell corridor population decreased by 2% in the North Trade Area and 1% in the South Trade Area. The Apache Blvd Trade Area population increased by 14%, and Main Street Mesa increased by 11%. Sunnyslope and Camelback saw increases in the 6 to 8% range.

Each of the 5 corridor trade areas were (and are) low-income communities. Those making less than \$35,000 annually constituted approximately half the population of the trade areas in each of the five corridors, ranging from 45% of the Convenience Trade Area in Sunnyslope in 2010 to 62% of the Apache Blvd Trade Area in 2014 (although that figure includes students).

The percentage of low-income households in the trade areas of the five corridors has decreased from the initial MetroEdge engagements to the 2018 totals. The North Trade Area for McDowell saw a decrease of low-income households of more than 21% from 2016 to 2018. Main Street Mesa saw a decrease of 12% in the number of households earning less than \$35,000 annually. Camelback had a decrease of 11% of those earning less than \$35,000.




Project Overview

Context

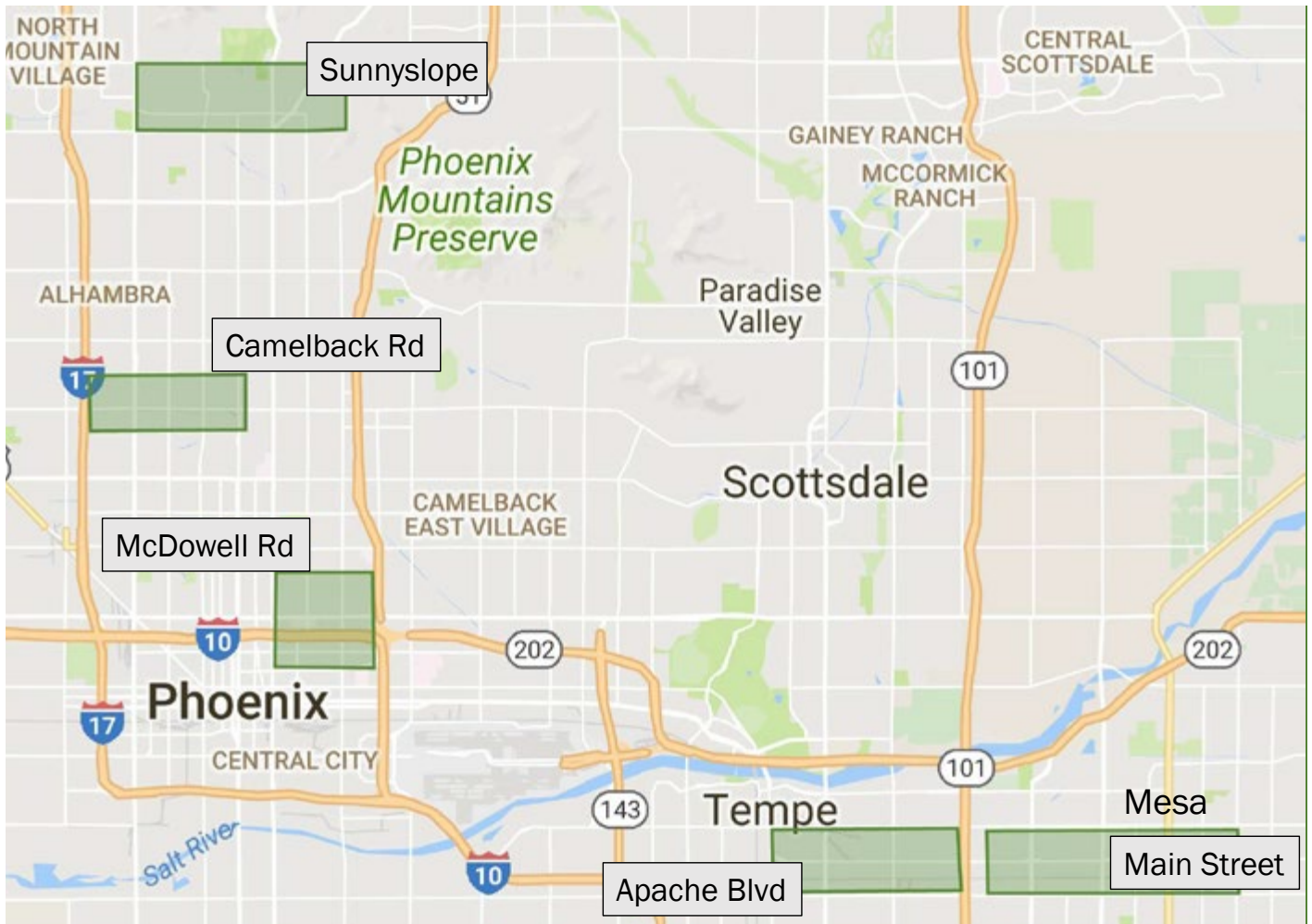
Phoenix Metro Area is growing:

- One of country's fastest growing metro areas
- Population projected to grow from 4.3 million to 6.3 million in next 12 years
- A 2012 forecast projected a need for over 300,000 housing units to as many as 480,000 by 2040
- Over 35,000 jobs have been created within ½ mile of light rail since 2008
- Regional growth and light rail have created economic opportunity

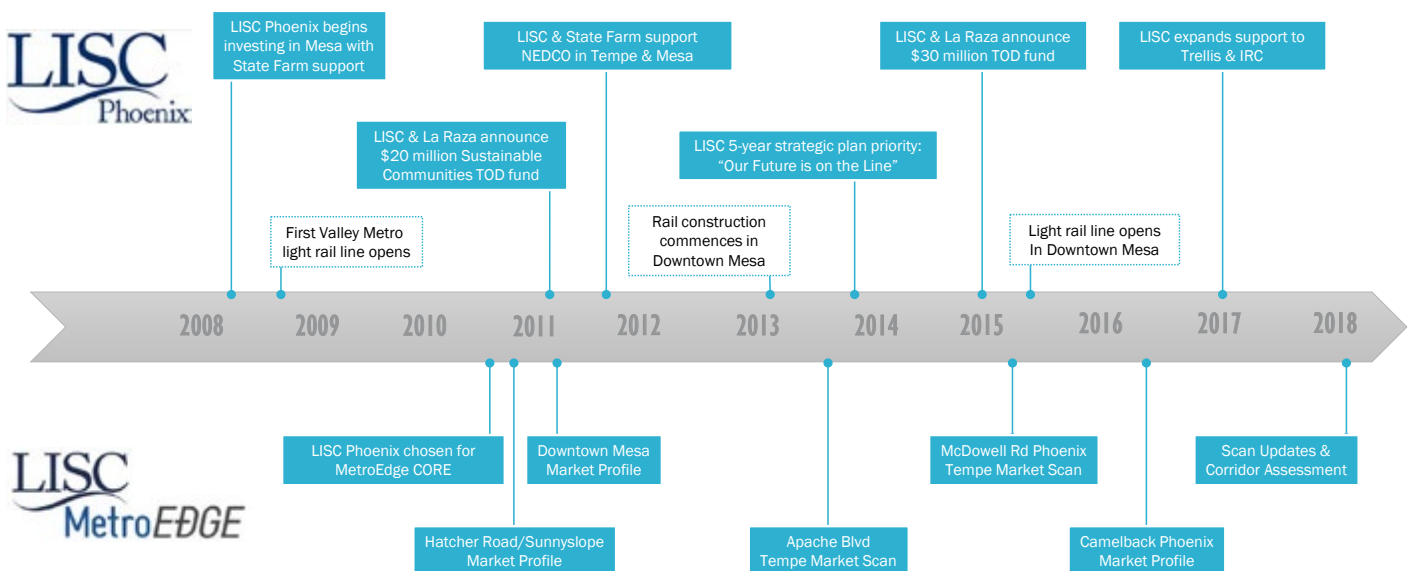
LISC Phoenix has committed to:

- Equitable transit-oriented development on the light rail corridor
- Increasing availability of affordable and mixed income housing
- Supporting creation of accessible jobs and goods and services
- Providing residents with tools to break the cycle of poverty
- Creating vibrant, diverse, and healthy communities that improve the quality of life for area residents

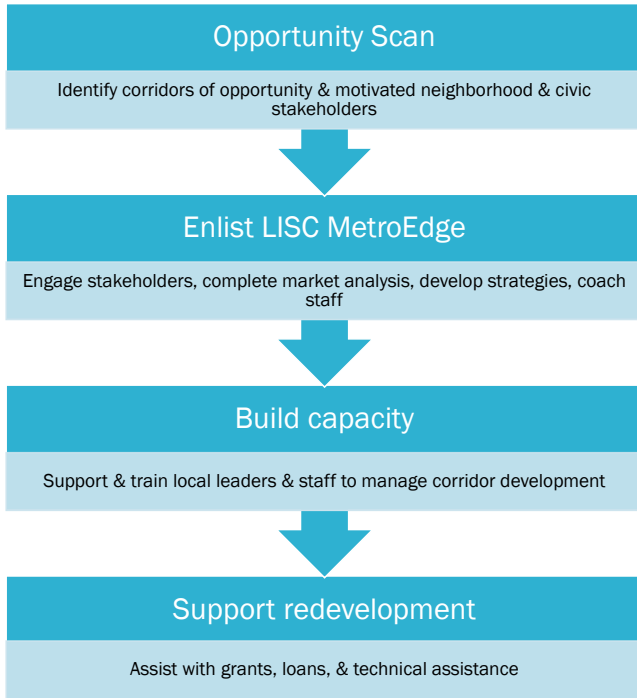
Map of Corridor Engagements



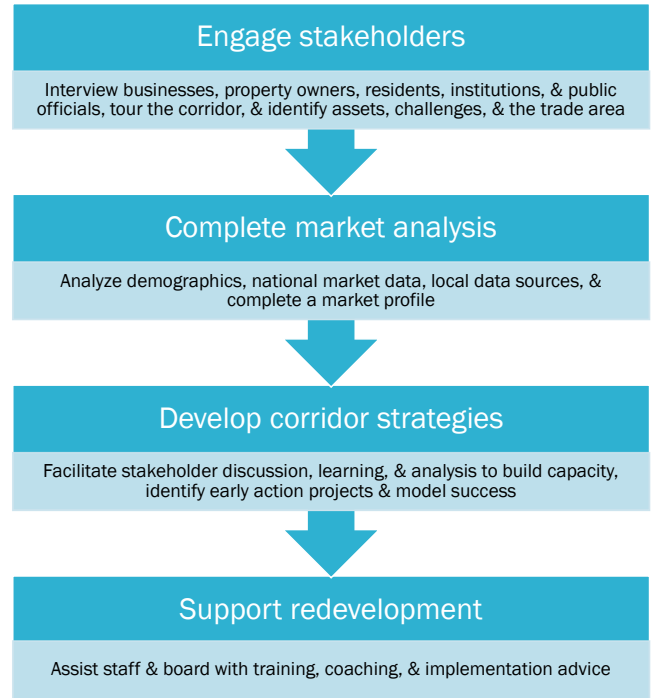
Time Line of LISC Phoenix and LISC MetroEdge Corridor Engagements



LISC Phoenix Approach



LISC MetroEdge Approach



Overview of Corridor Engagements

Corridor	Community Partner	Initial Engagement	Primary Corridor Focus	Impetus for Engagement	Local Capacity
Sunnyslope, Phoenix	Desert Mission	2011-2012	Hatcher Rd, I-17 to 16th	CORE award from LISC and Lincoln Hospital	Experienced social service organization Knowledgeable economic development staff
Main Street, Mesa	NEDCO	2011-12 2015 update	Main Street Mesa Dr to-Alma School Rd	Imminent construction of light rail	Experienced CDFI Small business consultants
Apache Blvd, Tempe	NEDCO	2013-14	Apache Blvd, RR west of Rural to Price	Impact of light rail completion ASU expansion Changing economics	Experienced CDFI Small business consultants
McDowell Rd, Phoenix	Trellis	2015-16	McDowell Rd, 7th Ave to Route 51	Trellis track record, staff experience Banner Hospital real estate investment	Experienced housing organization Strong management
Camelback Rd, Phoenix	IRC	2016-17	Camelback Rd, I-17 to 7th Ave	Light rail completion Redevelopment opportunities	Experienced social service organization Strong management

Corridor Snapshot: In the beginning¹

Corridor	Completed MetroEdge analysis	Trade area			Household Incomes	
		Area	Population	Size	<\$35,000	>\$50,000
Sunnyslope, Phoenix	January 2012 Data: 2010	Convenience	2010: 42,380	6.6 square miles	45%	41%
Main Street, Mesa	January 2012 Data: 2010	Convenience	2010: 19,880	3.97 square miles	36%	27%
Apache Blvd, Tempe	September 2014 Data: 2014	Convenience	2014: 33,508	5.2 square miles	62%	24%
McDowell Rd, Phoenix	August 2016 Data: 2016	North	2016: 13,496	4.7 square miles	47%	41%
Camelback Rd, Phoenix	December 2016 Data: 2016	Camelback area	2016: 30,775	5.3 square miles	54%	31%

Corridor	Housing			Buying Power		Retail Float	
	Total Units	Average HH size	Home-ownership	Total	Concentrated	Positive (\$ Out)	Negative (\$ In)
Sunnyslope, Phoenix	17,622	2.46	47%	\$423 million	\$64 million/sq mi	\$122.8 million	\$1.1 million
Main Street, Mesa	9,412	2.11	34%	\$246 million	\$62 million/sq mi	\$61.9 million	\$74.1 million
Apache Blvd, Tempe	11,313	2.09	11%	\$361 million	\$69 million/sq mi	\$191.0 million	\$185.9 million
McDowell Rd, Phoenix	12,344	2.37	35%	\$321 million	\$43 million/sq mi	\$122.0 million	\$102.2 million
Camelback Rd, Phoenix	11,401	2.68	28%	\$338.9 million	\$64 million/sq mi	\$76 million	\$700 million

¹ For definitions of Trade Area, Retail Float, Buying Power and other terms, see Appendix: Definitions. . For information on data sources, see Appendix: Data Sources.



Key Findings

Review of Findings

What changed as a result of LISC investment in corridor economic development?

In every case, the local conditions on the corridors improved. While both the resources and availability of support for implementation – seed capital, investment tools, and a support system – has been mixed, improvement continues when resources flow.

Corridor managers on McDowell, Camelback and Main Street Mesa have been a critical ingredient to corridor improvement. The business footprint is simply more robust where conscious strategies have been implemented by a dedicated practitioner.

If the goals are new choices for customers, improved outcomes for business and a safer more attractive environment for all, then the McDowell, Camelback, Main and Apache corridors can demonstrate and celebrate visible success.

In the case of Sunnyslope, staffing shifts and other organizational priorities, coupled with the disparate conditions on Hatcher meant that while individual property/business improvement continue several years later, a revived effort (which has already begun) is necessary. Next steps will require going back to basic community engagement and defining a new set of strategies appropriate for the current environment.

Change in Population

Corridor		Initial Engagement	2018	% Change
Sunnyslope, Phoenix	Trade	21,395	22,950	7%
	Convenience	27,150	28,860	6%
Main Street, Mesa		19,880	22,125	11%
Apache Blvd, Tempe		33,508	38,379	14%
McDowell Rd, Phoenix	North	17,231	16,898	-2%
	South	13,496	13,375	-1%
Camelback Rd, Phoenix		30,775	33,118	8%

Changes in Income Levels

Corridor		Income Levels < \$35,000 annually			\$50,000 and above		
		Initial Engagement	2018	% Change	Initial Engagement	2018	% Change
Sunnyslope, Phoenix	Trade	51%	48%	↓ 6%	33%	35%	↑ 6%
	Convenience	45%	41%	↓ 8.8%	41%	45%	↑ 9.7%
Main Street, Mesa		58%	51%	↓ 12%	27%	32%	↑ 18.5%
Apache Blvd, Tempe		62%	58%	↓ 6.5%	24%	29%	↑ 20.8%
McDowell Rd, Phoenix	North	47%	37%	↓ 21.3%	41%	49%	↑ 19.5%
	South	66%	60%	↓ 9%	22%	27%	↑ 22.7%
Camelback Rd, Phoenix		54%	48%	↓ 11.1%	31%	38%	↑ 22.5%

Changes in Buying Power

Corridor	Concentrated Buying Power			Total Buying Power			
	Initial Engagement	2018		Initial Engagement	2018	% Increase	
Sunnyslope, Phoenix	2010	\$64 million/sq mi	\$107 million/ sq mi	2012	\$423 million	\$681 million	61%
Main Street, Mesa	2012	\$62 million/sq mi	\$98 million/sq mi	2012	\$246 million	\$390 million	59%
Apache Blvd, Tempe	2014	\$69 million/sq mi	\$96 million/sq mi	2012	\$361 million	\$498 million	38%
McDowell Rd, Phoenix	2016	North: \$54 million/sq mi	North: \$97 million/sq mi	2016	North: \$252 million	North: \$455 million	North: 78%
		South: \$25 million/sq mi	South: \$76 million/sq mi		South: \$68 million	South: \$205 million	South: 201%
Camelback Rd, Phoenix	2016	\$64 million/sq mi	\$117 million/sq mi	2016	\$339 million	\$625 million	84%

Corridor Conditions and Resources

Since the initial market analysis, each corridor has seen substantial improvement, due to a combination of economic and market factors, local engagement, and institutional support. Corridor organizations have gained knowledge and have adapted strategies to reflect both a changing environment and their own learning. Each corridor is a work in progress. Corridor development takes time to produce results and often is incremental, unless a major redevelopment initiative is underway, leveraging significant resources. The ability to accomplish results depends upon a complex set of factors that include:

- Market conditions in the corridor, including population density, income levels, competition both on and off the corridor, economic trends, and current and anticipated investments in infrastructure, such as light rail, streetscape improvements, and amenities
- Existence of and capacity of a local organization to lead corridor redevelopment efforts
- Local will: Commitment of local organizations to assign dedicated staff to concentrate his or her activities on corridor management
- Support of public agencies and especially locally elected leadership to the target corridor
- Anchor investors, institutions, and/or partners such as LISC, medical centers, financial or educational institutions, and large companies
- Presence of incentives: small business assistance, workshops, storefront renovation grants, financing
- Market making tools: support and incentives to expand investment, density, and profitability

Threshold Elements for Investment

The experience of LISC Phoenix in its five corridor investments mirrors closely the criteria identified by LISC MetroEdge for determining the basic characteristics for success of a commercial corridor development process. They include:

Minimum Density: Convenience markets surrounding targeted corridors typically require a minimum density of 5,000 households per square mile.

Accessibility and Safety: Corridors must be easily accessible by car and public transit. Residents of a target market should feel safe driving, walking, and living in the area, and should project a sense of safety on foot and by car during daylight hours. Selection of corridors along the light rail by LISC Phoenix begin with the advantage of easy accessibility.

Existing Retail: Some concentration of fully operating retail must be present as a starting point. Creating retail from scratch is a challenging proposition.

Capacity: Engaged, competent staff dedicated to corridor work at the community level is essential to facilitate the process, define priorities, and champion implementation of agreed upon strategies.

While no prospective corridor contains all of these elements in equal measure, it is important to assess the strengths and weaknesses of a prospective corridor, and to intentionally address missing components to increase the likelihood of success.

Other Important Characteristics for Targeting Investment

The following characteristics, while not threshold elements for investment, have been shown to be important contributors to the likely success in improving a targeted corridor:

Income Diversity: Areas with increasing income diversity and/or at least 20 to 25% of the households at middle income or above create a better, more stable business environment for existing and new retailers.

Buying Power: Buying power is a critical translation of a ready market and a leading indicator that residents have resources available to spend on retail.

LISC Phoenix Investments

Corridor	Initial Strengths	Initial Weaknesses	Sample Interventions
Sunnyslope, Phoenix	<ul style="list-style-type: none"> Anchor institution: John C. Lincoln Medical Center Initially strong staff capacity in retail/commercial development 	<ul style="list-style-type: none"> Weak concentration of retail Staff capacity diminished Not a core activity of organization 	<ul style="list-style-type: none"> New revitalization committee formed Financial Opportunity Center created
Main Street, Mesa	<ul style="list-style-type: none"> Incoming light rail Attractive infrastructure/amenities NEDCO – a CDFI – lending and small business advising capacity Anchor institution: Mesa Arts Center 	<ul style="list-style-type: none"> Low density 3-4 years of construction NEDCO staff transitions Not central to any freeway access 	<ul style="list-style-type: none"> Organizing to combat disruption of construction Activate the Alleyways Promotions and events to build reputation as a destination New housing built near Main Street
Apache Blvd, Tempe	<ul style="list-style-type: none"> ASU – strong anchor with high density of students Several longstanding businesses thriving New light rail Early redevelopment stopped at cleanup Growth of State Farm in Tempe 	<ul style="list-style-type: none"> ASU students displacing homeowners Several large gaps – vacant land Light rail completed without strong community and business engagement 	<ul style="list-style-type: none"> New housing being built on Apache Small business consulting Development of Spice Trail to attract diners at area restaurants Murals and public art
McDowell Rd, Phoenix	<ul style="list-style-type: none"> Place-oriented host organization in Trellis Active community participation \$500 million investment by Banner Growing entrepreneurial and employment Base and high traffic volume 	<ul style="list-style-type: none"> Wide street, fast moving traffic Large gaps - vacant land and buildings Lack of participation by Banner New, inexperienced corridor manager Spotty retail 	<ul style="list-style-type: none"> Regular community cleanups Engagement of Banner reps in promotions and revitalization committee Training for new corridor mgr
Camelback Rd, Phoenix	<ul style="list-style-type: none"> Active, committed Councilwoman Light rail and Park and Ride facility Several well-maintained strip centers High traffic counts Strong presence - schools and civic orgs 	<ul style="list-style-type: none"> Wide, fast moving street No initial corridor organization Inexperienced corridor manager Homeless population Other nearby shopping (Mall) 	<ul style="list-style-type: none"> IRC recruited to work corridor Training for corridor manager Cleanups engaging local schools World Bazaar and Pop-up Markets attract shoppers

Population: Level or increasing population size is necessary (or a clear explanation of why the trend is negative), with age and racial diversity being beneficial.

Occupied Housing: Housing, whether rental or for-sale, should exhibit the following trends:

- Residential stock contain occupancy rates between 80 -90% depending on the size of the area and location.
- Foreclosure mitigation efforts and other mechanisms to retain and maintain the residential community are seen as working for the area.
- Housing development is ongoing with new housing options available and attractive to middle and upper income households.

Other Factors Contributing to Successful Corridor Initiatives

- A local organization with realistic goals that begin with creating a safe, clean corridor, healthy business environment, and a mix of goods and services that address community needs.
- Seed funding to support a local organization and a corridor manager devoted to the effort.
- The MetroEdge market analyses have been shown to provide both sound data upon which to make decisions and a process to educate stakeholders about realistic potential for the district.
- An engagement process that energizes businesses and residents to participate in early action projects that show visible results and grows the capacity of the partners to take on larger, more complex projects.
- Ongoing periodic technical support through LISC and MetroEdge will speed implementation and produce earlier and better results.
- Improvements occur through patient local engagement. LISC must be prepared to support corridor initiatives over the long term with its traditional tools and attention to secure meaningful and substantial outcomes.
- Efforts to create a clean and safe environment, improved customer service, a positive business climate, and employment opportunities serve as a catalyst to accelerate and guide basic economic forces toward successful corridor development.
- Healthy corridor initiatives leverage other LISC priorities, creating the preconditions to better address issues of employment, family economic self-sufficiency, housing and real estate investment.

The Role of LISC Phoenix

Building Capacity

In a market that historically has had little (or sporadic) neighborhood economic development capacity, LISC Phoenix has effectively seeded local organizations, supported them financially and with technical assistance, and helped several emerge as competent corridor managers.

LISC Phoenix astutely identified Trellis and International Rescue Committee (IRC) as strong organizations with effective management systems and an interest in economic development, helping them grow into the commercial corridor arena.

Early on, LISC's support of NEDCO produced energy, enthusiasm, and positive programmatic outcomes. As NEDCO transitioned through directors and merged with A New Leaf, LISC served largely as a quiet, supportive partner, enabling the organization to restructure, and to rebuild relationships with the cities of Mesa and Tempe.

A long term and well supported partnership with State Farm has been essential.

LISC is fostering cross-community collaboration between new staff in the McDowell and Camelback corridors. They have shared information, tools, and techniques about neighborhood cleanups, business mixers, and financing for small businesses. As important, the commercial corridor manager role frequently is a lonely and somewhat isolated position. These interactions have helped the managers grow, while realizing that their challenges are not unique.

Financing

One of the most effective tools to foster corridor development is LISC's ability to support, package, and finance mixed-use and affordable housing on local commercial corridors. LISC Phoenix has a long, successful track record and high capacity to provide predevelopment loans, Low Income Housing Tax Credits, New Markets Tax Credits, and other lending vehicles.

LISC's role in producing housing is a critical element in the development of the area's commercial corridors. It serves multiple purposes in corridor development:

- Affordable units near transit reduce automobile dependency and promote walkable communities.
- Quality affordable rental and first time homebuyer housing provides a place to live near work, serving the work force needs of strategically located anchors.
- More housing means more "eyes on the street" – greater security, and more shoppers with money to spend.
- As traditional retailers struggle, demand for commercial corridor space declines. Residential buildings fill the need for more units, while filling gaps in formerly bustling retail corridors.

With projects such as Camelback Pointe in Phoenix, Valor on 8th in Tempe, Camelback Pointe on Camelback, and ArtSpace in Mesa, LISC investments, frequently the "first in", boost neighborhoods, shopping, and corridor development.

While LISC Small Business can be a useful tool in deploying SBA resources across the Valley, there appears to be a significant need for additional financial incentives that can be "corridor-focused" – flexible, incentive financing that is not bound by SBA requirements, especially for new and emerging businesses.

LISC co-sponsorship and support of NEDCO and Local First Arizona small business consulting, as well as GoDaddy-sponsored technical assistance workshops and consultations are growing the entrepreneurial ecosystem in Greater Phoenix.

LISC Phoenix TOD Fund and the Sustainable Communities Collaborative have been important vehicles to raise the visibility of TOD throughout the Valley and a important resources to attract and secure investment for both business, employment, and housing.

Leadership

LISC Phoenix's "Our Future is on the Line" campaign has effectively focused attention on the critical importance of equitable development in communities adjacent to transit, which is especially important in a region that is projected to grow by more than 2 million residents over the next 25 years. It also focused resources where LISC constituencies could be assured access, and served to educate public decision makers about the importance of access.

With investments in Sunnyslope, Mesa, Tempe, McDowell, and Camelback, LISC Phoenix has begun to create a neighborhood-driven economic development delivery system – a network of committed organizations and skilled practitioners with the ability to catalyze economic development opportunities throughout the Valley.

LISC Phoenix with the ongoing support of State Farm has supported its commitment to TOD and "Our Future is on the Line" with substantial investments: in 2017, alone, investing over \$23 million in over 80,000 square feet of commercial space, 996 units of housing, and granting over \$850,000 for community development projects.

LISC Phoenix’s “transit village” concept is intended to serve as a model for integrating residents into labor markets around transit corridors, supporting ridership opportunities, and establishing transit stations as destinations with quality goods and services that also serve as centers for arts, culture, and civic life.

With its community linkages, financial tools, and its economic development experience, LISC Phoenix is uniquely suited to engage government, for profit, and nonprofit partners in strategies to connect neighborhood assets to the mainstream of today’s new economy. These strategies might address some of the following issues:

- The decline of retail, the rise of Amazon, Walmart, and other online retailing, and the potential re-use of obsolete commercial corridor land and buildings
- Zoning requirements mandating ground floor retail space in mixed use buildings for which there is little or no market, and the potential future use of those spaces
- The impact of decreasing transit ridership on urban communities with the increased use of Uber, Lyft, and the potential future use of autonomous vehicles
- Connecting neighborhood assets (land, labor, capital) with growth clusters in the regional economy
- Deploying the resources of Financial Opportunity Centers to create an employee pipeline to quality living wage jobs in expanding business sectors of the Greater Phoenix economy

The Impact of Transit and Transit-Oriented Development

While providing considerable long-term benefits in the short term, light rail construction invariably creates a negative impact on existing businesses. Traffic patterns change, turning lanes are adjusted, access and parking are limited. The ability of businesses to survive depends upon planning and preparation before, during, and after construction. Cooperative efforts in Mesa mitigated potential harm and created excitement and optimism. It takes a village committed to sustaining the business footprint.

When light rail divides a street, it frequently creates 2 different markets. Customer traffic - impulse shopping – diminishes from one side of the street to the other.

The effort to create “walkability” requires not only attractive amenities (trees, lights, benches), but also a street that has a narrow width, and thoughtful planning and promotion – the challenge with both the McDowell and Camelback (car) corridors.

Smaller, weaker, undercapitalized businesses will find it even more difficult to survive the construction of light rail even with significant mitigants such as in Mesa. This occurred especially few or no neighboring businesses were nearby.

Successful businesses will adapt to traffic changes.

Transit-oriented development is far more likely to be successful when it is accompanied by a strong market (customer base). It is important that TOD plans are designed to rely upon transit ridership or the draw of the station as a supplement to, rather than as the primary driver of development.



Corridor Profiles

Overview

The following section profiles the 5 commercial corridors supported by LISC Phoenix. They each include the following information:

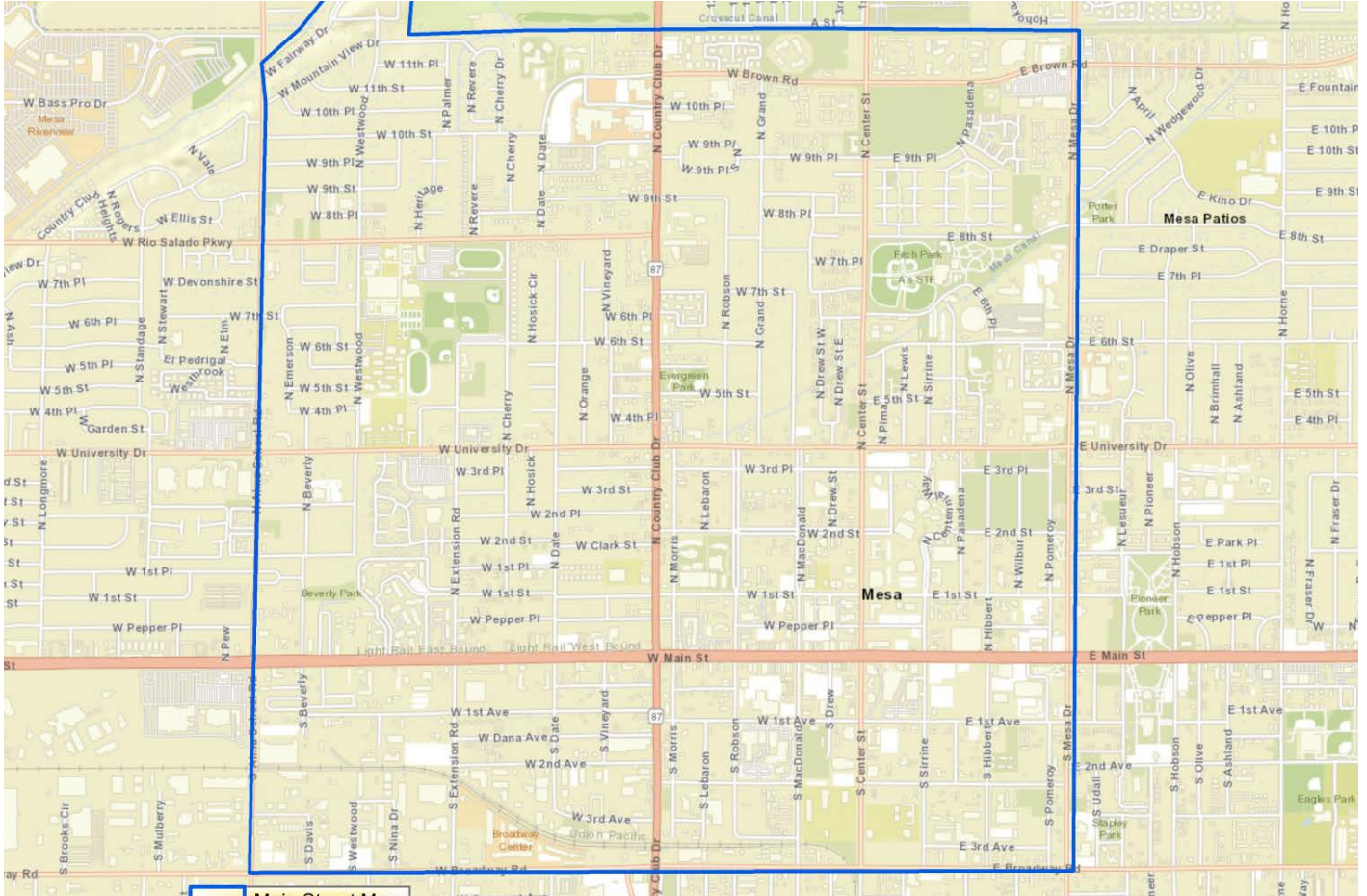
- A map of the corridor trade area (or areas, if more than one was studied) and a description of the boundaries. Unique features affecting the calculations of Retail Float are noted where applicable.
- Goals, Assets, and Challenges are described as defined by the local corridor organization at the time of the initial MetroEdge study, and as included in the initial MetroEdge report on the corridor.
- A demographic comparison notes the change in key data points from the time of the initial study to 2018, including total population, race, age, household incomes of \$50,000 and above, and household income levels below \$35,000, household size and tenure, and education levels.
- A market data comparison examines the retail, supply, demand, Retail Float, and Buying Power from the time of the initial corridor study to 2018.
- Strategic opportunities for each corridor, as they were identified in the initial study, and a report of the progress toward taking advantage of those opportunities.
- Key Findings assess the management of the corridor, changes in the market, and the development environment on each corridor since the initial study through 2018.

LISC MetroEdge began analysis of commercial corridors for LISC Phoenix in 2011 in Sunnyslope and Main Street Mesa. Subsequently, market profiles were completed for Apache Boulevard in Tempe, McDowell Road in Phoenix, and Camelback Road in Phoenix. In reviewing the following assessment, it is important to note the following:

- Each Market Profile was performed at the request of LISC Phoenix, in cooperation with one or more local organizations. Each market is different, was analyzed at a different time, and each organization sought different information upon which to base decisions. As a result, the engagements and the ultimate work product were tailored to meet local needs.
- Data was procured from a combination of Nielsen/Claritas/Envionics Analytics, ESRI, and a variety of local sources. Data was sourced from 2010 through 2018, as noted in the assessment. Comparisons may be useful to indicate general market characteristics, broad trends, and to identify questions for further inquiry. Additional data and more detailed analysis may be necessary to obtain more precise information necessary to inform decision-making.
- The process also reflects the evolution of MetroEdge products and services over an 8 year period, as MetroEdge and its clients gained access to better, more complete data and a more thorough understanding of the market place in the Greater Phoenix area.



Main MESA



The Convenience Trade Area which is a traditional residential area with the exception of automotive uses, is the area that typically includes traditional “Saturday morning” shopping needs such as pharmacies, groceries, dry cleaners or hardware stores. Customers typically prefer to find these goods and services within a 10-minute walking or driving distance of their home.

The Convenience Trade Area boundaries are:

- East:** Mesa Drive
- West:** Alma School Road
- North:** Tempe Canal
- South:** Broadway

Goals

Increased profitability of merchants, property owners, and other business interests and satisfied customers

Increased density and diversity of retail businesses that attract more customers

Attractive corridor appearance that supports the Mesa Arts Center

Business mix that serves the immediate community as well as destination shoppers and “snowbirds”

Resources to invest in the corridor as soon as feasible

Light rail supports local business interests valley-wide

Assets

Mesa Arts Center is an established anchor and draw

City is committed to a policy framework supportive of a walkable, attractive corridor

There are ready tools for supporting individual business improvements

New committed staff and community leaders at City, Chamber, Downtown Mesa Association, West Mesa CDC and NEDCO focused on improving and sustaining a viable corridor

Recent completion of Central Main Street Plan

Population is age diverse and 34% of households earn \$50,000 above

City of Mesa committed to holding light rail accountable to help insure businesses survived; supported significant promotion

Challenges

Construction of light rail will disrupt current businesses and shopping patterns; many businesses are apprehensive about their future

Residential density is low in Downtown area

Perception that light rail will increase values and result in required property improvements proposed in Central Main Street Plan

Rental rates are below comparables now, but it is feared that may change as business grows on Main Street

A leading voice for the business community does not rest in any one organization



On Mesa's Main Street, A New Day Dawns

Central casting couldn't come up with better ambassadors for Mesa's Main Street dining and drinking scene than Kelsey and Jim Bob Strothers. They own and operate Worth Takeaway, the sandwich shop that opened two years ago near the Country Club/Main Street light rail stop.

Young (she's 31, he's 40), energetic, attractive and engaging, they represent a new Main Street

zeitgeist defined by brew pubs, cider houses, charming eateries and the customers they attract. The couple, who before opening Worth worked for a Phoenix restaurant group, live around the corner from their business.

"We felt we could add something to the community," said Kelsey. "We opened just two months after the light rail was completed. Conditions were a little testy because some businesses



Kelsey and Jim Bob Strothers opened Worth Takeaway, a sandwich shop, on Mesa's Main Street two years ago. They represent a new wave of restaurants, coffee bars, and brew pub owners who are breathing new life onto the street.

had closed. It was a transitional time, but we saw a lot of opportunity."

Light rail construction

The "transitional time" was, in effect, the four-year period starting in 2012 in which the Metro Valley light rail line was extended 3.1 miles to the eastern end of Mesa, adding four stops to the 26-mile route that traverses metropolitan Phoenix. For existing Main Street merchants, the prospect of having their street and sidewalks – the entrance to their businesses – in

a state of chaos for several years was cause for alarm.

But Scott Smith, Mesa's mayor when construction planning began (he now runs Valley Metro), and the Neighborhood Economic Development Corporation (NEDCO), a community organization involved in Mesa and Tempe business development, had a strategy to deal with the chaos.

"Merchants said don't ruin our downtown by going down Main

Street,” said Smith. He responded by establishing a planning committee in 2009, comprising more than 30 merchants. Ultimately, it was their decision to run the extension down Main Street.

“That started us on a good foot,” said Smith.

NEDCO, meanwhile (under the leadership of Terry Benelli, the current executive director of LISC Phoenix), along with Valley Metro, began laying the groundwork with merchants, preparing them for the disruption and organizing events – mural paintings, musical performances, etc. – designed to attract visitors despite the construction. NEDCO, with funding from LISC, State Farm, and Chase, also worked with merchants to emphasize available parking behind their stores, so shoppers could avoid Main Street construction. Grants were available for storeowners to beautify

their rear entrances, which since then have remained a popular form of entry.

Laying the groundwork

“On a Thursday night, we’d have 10 or 12 businesses having micro events within their stores,” said Augie Gastelum, a NEDCO outreach worker at the time. “It gave them something to promote with their customers. They were small, little things that seemingly were disconnected, but were actually planned to get people down here during light rail construction. Building off of the work of the Mesa Arts Center, we started using art as tool to bring people down here. That was the birth of the murals you see here now.”

The result? Over the four-year construction period, Gastelum says there was nearly a net zero loss of businesses on Main Street whereas in other parts of the metropolitan area that witnessed light rail construction,

businesses declined by nearly 40 percent.

That’s not to say no businesses closed. They did. But new ones moved in to replace them.

“I credit that with NEDCO’s business assistance program,” he said. “We lent more and made more loans during construction than we did before or after.”

He also credits a 2011 business assessment by LISC’s MetroEdge, a retail marketing service, to analyze the business climate along Main Street, defining the jobs there, the money the corridor attracts, and early actions that would help merchants survive the construction.

“Without it, we would have been shooting darts in the dark, trying to guess what the needs or opportunities were,” said Gastelum. “Not only did those reports bring together a

Augie Gastelum was among those helping Main Street merchants cope with a four-year light rail construction project.





Main Street's pedestrian-oriented streetscape is conducive to new businesses, such as Worth Takeaway and the Oro Brewing Company, that are drawing customers from the neighborhood.

bunch of data, but they also outlined general steps to revitalize the area. I'd bet that if I pulled out the 2011 Mesa report and looked at things that happened over eight years it would follow that roadmap. MetroEdge was key to the work."

While light rail hasn't brought the stampede of new customers that some Mesa boosters hoped for, it's steadily growing.

"Everyone talked about when it's done we'll see so much business," said Gastelum. "But it's an economic benefit that just starts when construction is finished. You won't immediately see a mass increase in business. But now, two years in, businesses are seeing more business."

These projects, he said, have a big impact in the long run. In 20 years, not two.

New developments

"Anyone who doesn't tie new development to light rail is ignoring the realities," he said. "A 500-unit development has been proposed, 50 units of ArtSpace Apartments will go on line in the next two months, 200 more units at Country Club and Main. Two hundred units were built during light rail construction. All of those things begin to add up. All of a sudden you have users living here, walking to and from the stations. Habits start to change, people shop in local areas. That's the impact we haven't seen, but it's in the works."

That Main Street's business climate remained healthy during light rail construction helped set the stage for newcomers like the Strothers.

"We had a lot of people rooting for us," said Kelsey. "They were excited to have new blood – something fresh and different downtown. Other people thought, 'Good luck, a lot of things

happened down here and opened and closed.'"

They had no marketing budget and counted on good customer service and word of mouth to generate business. Part of their strategy was to keep consistent hours, a practice that not all other Main Street businesses adhered to.

"Our way of connecting was in all the little details of someone's experience when they came in," said Kelsey. "Just with interactions we had with everyone, remembering their names, their orders, all the little things. To make their experience better. It was a fresh breath of air for people who maybe didn't have that experience in the downtown area."

The opening of Oro Brewing Company down the street turned out to be a mutual benefit for both businesses. Worth doesn't serve alcoholic beverages. Oro does. Oro doesn't serve food. Worth does. So if Oro

During light rail construction, NEDCO, with funding from LISC and State Farm, provided grants to merchants so they could spruce up the rear entrances of their shops. Those improvements remain popular with customers today.



patrons are hungry, they can simply order from Worth and the food will be delivered.

“That’s our customer base at night,” said Jim Bob. “There may be no one in the dining room here, but the kitchen will be busy making food for Oro.” Worth patrons are also welcome to use the Oro bathrooms.

Prior to opening, the Strothers traveled to several European and American cities to get ideas about how their restaurant should look and feel. The question, said Jim Bob, was how to create a sense of community.

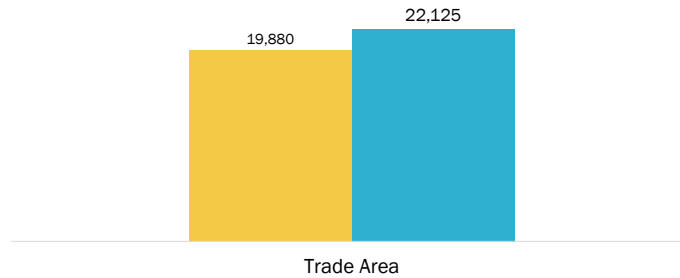
“People walk into a restaurant and say it feels like Portland,” he said. “Or New York. Or Chicago. It’s different things to different people.”

“We can’t wait,” said Kelsey, “until people say this feels like Mesa. We want Mesa to be a place where people want to be.” ■

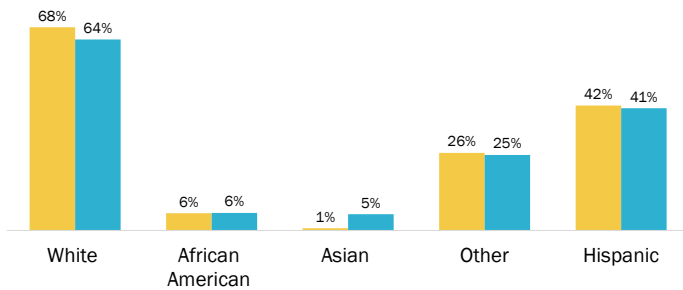
Then and Now

2010 2018

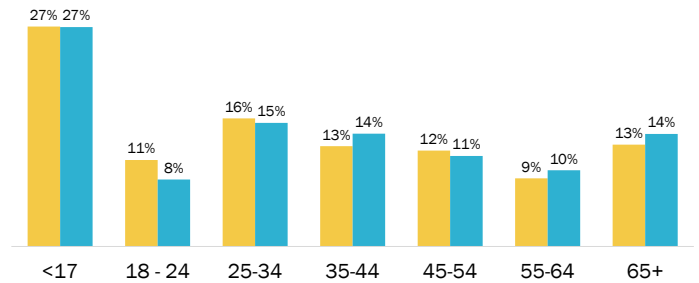
Total Population



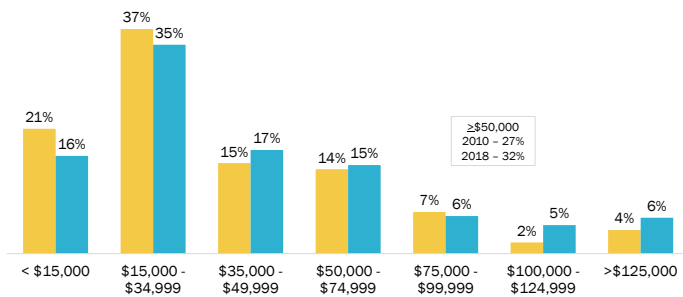
Race



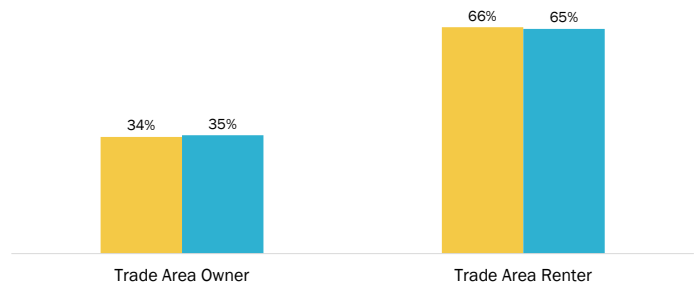
Age



Income



Tenure



Average Household Size



Educational Attainment

25 & older	2010	2018
Less than 9th grade	14%	11%
Some high school, no diploma	12%	10%
High school diploma	30%	30%
Some college or Assoc. degree	28%	33%
Bachelor's degree	12%	4%
Post graduate degree	4%	1%

Retail Demand and Supply

2012 Trade Area Annual Expenditures

Category	Demand	Supply	Float	Float as % of Demand
Building Material & Garden Equipment	\$18,421,258	\$8,851,268	\$9,569,990	52%
Clothing & Clothing Accessories Stores	11,717,683	8,549,852	3,167,831	27%
Electronics & Appliances Stores	5,466,951	45,081,580	(39,614,629)	(724.6%)
Food & Beverage Stores	39,133,614	41,000,791	(1,867,177)	(4.8%)
Foodservice & Drinking Places	29,629,519	36,717,676	(7,088,157)	(23.9%)
Furniture & Home Furnishings Stores	4,191,387	5,073,644	(892,257)	(21.3%)
General Merchandise Stores	35,109,582	12,584,669	22,524,913	64.2%
Health & Personal Care	13,187,244	17,503,256	(4,316,012)	(32%)
Miscellaneous Store Retailers	6,081,381	18,814,677	(12,733,296)	(209.4%)
Sporting Goods, Hobby, Book, & Music Stores	4,849,146	13,521,748	(8,672,602)	(178.8%)

2018 Trade Area Annual Expenditures

Category	Demand	Supply	Float	Float as % of Demand
Building Material & Garden Equipment	\$15,734,994	\$39,239,948	(\$23,504,954)	(149%)
Clothing & Clothing Accessories Stores	13,733,425	17,102,604	(3,369,179)	(25%)
Electronics & Appliances Stores	5,280,657	21,061,163	(15,780,506)	(299%)
Food & Beverage Stores	41,068,989	36,034,457	5,034,532	12%
Foodservice & Drinking Places	39,212,987	47,304,289	(8,091,302)	(21%)
Furniture & Home Furnishings Stores	5,217,282	11,371,368	(6,154,086)	(118%)
General Merchandise Stores	37,790,575	22,431,322	15,359,253	41%
Health & Personal Care	17,435,867	18,828,119	(1,392,252)	(8%)
Miscellaneous Store Retailers	5,977,706	27,896,633	(21,918,927)	(367%)
Sporting Goods, Hobby, Book, & Music Stores	4,203,390	17,088,265	(12,884,875)	(307%)

Buying Power

2012 Trade Area

Concentrated Buying Power: \$62 Million per Square Mile

Total Buying Power: \$246 Million

2018 Trade Area

Concentrated Buying Power: \$98 Million per Square Mile

Total Buying Power: \$390 Million

Strategic Opportunities: January 2012

Organizational

- Coordination of efforts to improve the business community, coupled with technical assistance for businesses would improve owners' readiness for change and leverage results

Market

- Educate all regarding characteristics of the underserved market in Downtown Mesa and its current potential
- Link market information to possible short term business development and expansion strategies
- Develop a tracking system to measure impact of events on business generation
- Coordinate events to gain maximum investment impact, customers, and interplay between interests

Physical

- Before light rail disruption, develop plans and identify specific actions to create a sense of place now
- Find open space for events without closing the street
- Encourage continuous retail on the ground floor
- Improve entryway/gateway banner signage
- Improve lighting in front and back
- Slow down traffic

Progress Report

■ Substantially completed In progress Not yet completed

Organizational

- NEDCO leadership planned Activate the Alleyway program that brought together businesses and local organizations and engaged 22 artists in Creative Placemaking to support businesses.
- NEDCO's Creative Placemaking seeded Creative Catalysts program at Mesa Arts Center, engaging local artists under 30 in Downtown.
- LISC and NEDCO worked with City to streamline permitting system.
- Cooperative effort led to successful opening of Mesa Light Rail with events, activities, marketing, entertainment, and new energy.
- Transitions in organizations, leadership and lack of diverse revenue base slowed coordination and progress.

Market

- Promotions and events held at Arts Center, pocket parks, and throughout the corridor.
- Regular promotions: Festival of Arts, Spark! After Dark, Egg Hunt, CycloMesa, Motorcycles on Main.
- Mesa prototyping Festival and Southwest Makers Fest are important annual promotions.
- New entryway banners, brochures, and signage have refreshed the corridor and improved its image.
- Signage and banners need regular updating.
- Organized marketing and promotion to attract snowbirds and students, but inconsistently targeted.

Physical

- Activating the Alley Way was a huge success: 18 storefronts improved, project completed in 4 months, and a streamlined system in place.
- Lighting has been improved in front and in back of businesses.
- With completion of light rail, traffic has slowed on Main Street.
- New residential attracted to Downtown Mesa: ArtSpace, Encore Senior Living.

Business Retention and Attraction

- Regular business assistance and financial counseling sessions held.
- No net loss of businesses during and after light rail construction.
- New business attracted: Worth Takeaway, Cider Corps, Desert Eagle Brewing, Volstead Public House; from 2 new businesses in 2010 to more than 20 today.
- Fine dining restaurant not yet attracted to downtown.



Key Findings

Corridor Management

- Organizing by LISC, NEDCO, RAILMesa and City of Mesa was critical to sustaining Main Street throughout light rail construction. Community engagement, placemaking, promotions, and marketing prepared businesses to survive and thrive.
- Design and construction of light rail was an inclusive process with Valley Metro, City of Mesa, LISC, NEDCO, and other stakeholders that minimized business disruption and as a result was largely welcomed with enthusiasm.
- Leadership used opening of the light rail to bring focus to community and City efforts on Main Street, including increased promotion, improved infrastructure, and intensive small business support.
- NEDCO small business counseling and workshops provided "high touch" assistance in the midst of Main Street's construction.
- As NEDCO has shifted to increased emphasis on small business consulting and workshops, Downtown Mesa Association has expanded its promotions and marketing.

The Market

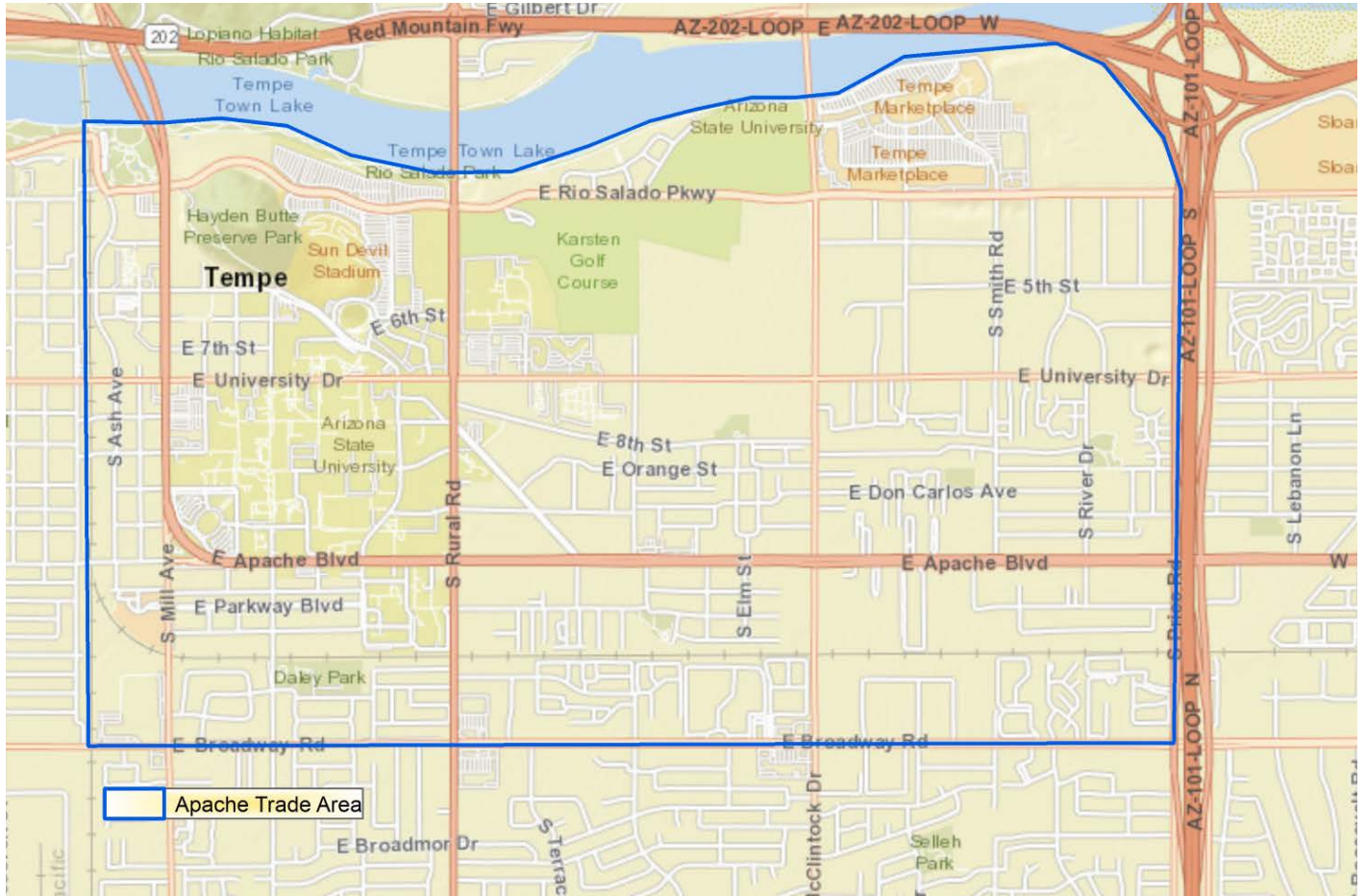
- Low population density was identified as a challenge in 2012. While still not a high density community, Mesa has seen an 11% increase in population from 2010 to 2018, a net increase of more than 2,200 people in the Trade Area.
- Total Concentrate Buying Power in the Trade Area has increased from \$62 million per square mile in 2012 to \$98 million per square mile in 2018, an increase of nearly 50%.

Development and Change

- Mesa Art Center continues to serve as a major anchor for Downtown, attracting investment nearby.
- Activate the Alleyway program improved corridor appearance, supported business viability, and created a lasting enhancement to the area: 18 storefronts renovated in 4 months.
- A conscious strategy of building more quality housing in and around downtown (such as Mesa ArtSpace Lofts, Encore Senior Living, and others) much of it financed in part by LISC Phoenix, not only has increased density, but also has added "eyes on the street" and created a perception of an active and lively community.
- Since light rail construction, Downtown Mesa has seen an increase in investment and small business growth on the side streets immediately adjacent to Main Street.
- Downtown Mesa did not experience a net loss of businesses during light rail construction. While Brown & Brown Chevrolet left Downtown, since light rail construction, more than 20 new businesses have opened, including Worth Takeaway, Cider Corps, Desert Eagle Brewing, Volstead Public House, and others.
- Marketing to attract "snowbirds" and students to Downtown still is only done a very limited scale.
- Main Street is increasingly seen as a Downtown food and entertainment district.
- Recent plans approved for an Arizona State University campus in Downtown Mesa have the potential to bring more customers to Main and drive further business expansion.



Apache



The Apache Blvd Convenience Trade Area includes both destination and convenience goods and services. The presence of the Fiesta Mall as well as the campus of Arizona State University suggested that a more granular analysis was necessary. A significant component of the Trade Area residential market is the student population, who report as lower income while generally having money to spend.

The Convenience Trade Area boundaries are:

- East:** Price
- West:** Railroad Tracks
- North:** River
- South:** Broadway

Goals

Support the improvement of the Apache Blvd corridor in the midst of major changes in the surrounding area, including:

Arrival of the Metro Light Rail

Location of State Farm in Downtown Tempe

Growth of Arizona State University

New proposed residential developments on the corridor

Preserve existing owner occupancy

Assets

Housing: Several submarkets with diverse housing choices; recent housing investment; New Town CDC and Habitat active in housing market

Corridor: Toliver's, Watson's, Haji-Baba and others form a strong business base; Food City is an important retail presence; successful ethnic restaurants and grocers; new developments planned or underway; University and City provide stability and investment; transit investment

Community: Long time active homeowners and civic groups; active business advocates; history of cooperation and success; volunteers with skills and energy; NEDCO and LISC

Infrastructure: Transit facilities; City facilities; Park and Ride; City resources; private charter school such as School for the Arts

Challenges

Housing: Transient student population; lack of other residential density; developer interest in tall buildings; remaining mobile home parks and motels; shrinking rates of homeownership

Corridor: Basic conveniences missing; ground floor retail in mixed-use buildings is often vacant; vacant lots and underdeveloped commercial space; need for centralized management; cleaned up yes – transitioned from the highway not yet

Community: No united strategy; many residents shop elsewhere, seeking higher quality; coordination between community/City/University lacking; outreach needed to ethnic residents

Infrastructure: Current policies encourage excess retail space; financial, design, and incentive tools are limited in scope and scale; transit splits the market; Metro light rail on the Apache corridor is a not yet fully developed asset

Apache Boulevard Poised for New Development

John Toliver's old enough to remember when alfalfa fields surrounded his family's carpet business on East Apache Boulevard. As Tempe grew and the farmland disappeared, Toliver's carpet business grew, too. A decade ago, he said, nearly 35,000 cars a day would speed past his business, Toliver's Carpet One, at 1920 E. Apache.



John Toliver in the showroom of his carpet store on East Apache Boulevard, with a photo of his ancestors who founded the business.

"I was born in 1949 and have seen a lot of change here," said Toliver, "almost all for the good. I try to stay informed as to what's going on here in Tempe and in the entire metro area because it's going so fast and a lot is going on."

That change began in the 1990s when the City of Tempe began cleaning up the Apache corridor, moving out undesirable uses and structures, increasing police protection (new police station on

Apache Boulevard) and ridding the area of some bad saloons and the actors who patronized them.

Meanwhile, Arizona State University dramatically expanded enrollment at its Tempe campus, creating a demand for new businesses, services and residential buildings that spurred growth on the Apache Boulevard corridor.

In some cases, change has not come as fast as Toliver and others would like. For example, he would like to see more apartment buildings along Apache to accommodate a growing ASU student population and young workers among the 8,000 employees at State Farm's nearby regional headquarters.

Growth potential

Over the years, Toliver's been a strong proponent of growth along

Apache. And why not? New residential construction, and new residents, means potential new business. In addition to being good for him, he thinks the influx of new people and businesses are good for Tempe.

On the other hand, some community organizations and neighborhood residents are leery of the sort of real estate development that might dramatically increase the density particularly along the corridor..

Whichever side of the growth picture one sees, there's little doubt the Apache corridor is on the cusp of major development. Question is, how will that happen? And when?

The Phoenix office of Local Initiatives Support Corporation has been addressing those questions for the last several years as part of its "Our Future is on the Line" strategy, in which its grant-making, lending and technical assistance focused on commercial and residential

development around the 26-mile light rail line.

On Apache, with major support from State Farm, LISC enlisted its affiliate MetroEdge to do a market analysis, documenting types of area businesses, residential demographic information, spending power, etc. – all designed to identify business opportunities. And in collaborating with and supporting the Neighborhood Economic Development Corporation (NEDCO) to work with local Apache businesses, and recruit new ones, in the environment following the arrival of light rail.

In addition to the changes the City of Tempe sparked on Apache in the 1990s and early 2000s, three additional factors influenced the corridor's evolution. The first was the arrival of Valley Metro's light rail system, providing a fast, efficient, economical way for students, workers

and others to get to and from Tempe from different parts of the metro area.

The second was the increased pressure for new housing – and the opportunities afforded by it – resulting from the expansion of ASU and the arrival of 8,000 employees at State Farm's new regional headquarters in Tempe.

The third was investment by LISC and State Farm in NEDCO, which promoted Tempe's ethnic restaurants along the light rail line and created a series of murals, highlighting the community.

Light rail

"Over and above customers, light rail spurred development along the corridor," said Alan Beveridge, NEDCO's business development manager. "That's been crucial to the economic goals of Mesa and Tempe by creating density that's required for the success of small businesses. We



Light rail is spurring development on the Apache commercial corridor, as well as on Camelback, Mesa's Main Street and on McDowell Road.



New real estate developments along the light rail line in Tempe

didn't have that density for years. Only in the last few years have we seen major developments start to take off."

That includes residential projects such as NEXA by Lennar, with 399 apartments and 4,300 square feet of retail space; the Meridian project, with 76 apartments for seniors; and Metro 101 Apartments, comprising 202 apartments – although a market still exists for units affordable to State Farm and other Tempe employees seeking to commute over light rail to work.

Toliver is a light rail proponent, despite the fact that the physical layout of the tracks and street have had a negative impact on his business.

"We have an average of 4,000 autos a day that come down Apache," he said. "Ten to 12 years ago, it was 35,000 per day. People (motorists) stay away from light rail because they don't like the number of streetlights and the difficulty of making U turns.

But we need light rail. We need a mode of transportation to get cars off the road. Our city needs to plan how to move people in and out of the area or how to develop higher capacity living in high-rise condos along our transportation routes."

Augie Gastelum, who as the former head of NEDCO was in a catbird seat to view Apache development, said the positive impact of light rail is indisputable.

"Anyone that doesn't tie new development to light rail is ignoring realities that exist," he said, ticking off the new residential developments that have been built, or are in the planning stages, for Tempe and Mesa. "All of those things begin to add up. All of a sudden, you have users living here, walking to and from the stations. Now home is right here. Habits start to change, people shop in local areas. That's the impact we haven't seen, but it's in the works."

Spice Trail

For the last couple of years, NEDCO has encouraged residents, businesses and visitors to establish those habits, largely through programs promoting local ethnic restaurants, improving business facades, creating new business signage, and collaborating with artists to paint murals on the corridor (many with financial support from LISC Phoenix, State Farm and the City of Tempe).

The restaurant effort is emblematic of the approach NEDCO has taken to marketing the Apache corridor.

"We did an inventory of businesses on Apache (using the MetroEdge analysis)," said Gastelum, "and it was obvious that restaurants were the asset of the corridor."

So NEDCO established Apache Eats, a periodic crawl where diners would be bussed from one restaurant to another to sample the ethnic fare.

Alan Beveridge, NEDCO's business development manager, says increased residential development near the Apache commercial corridor will be a catalyst for the creation of new businesses.



“And we started working with merchants,” said Gastelum, “asking what they would like to see. The answer was a consistent brand. ‘What are we?’”

So NEDCO enlisted a brand consultant to help answer that question. At about the same time, Gastelum saw a blog post from the Tempe tourism office, which referred to the Apache restaurant scene as the “Spice Trail.” Bells went off.

“That’s the one,” restaurant owners said when Gastelum presented the slogan. “Now businesses had ownership of the brand and so did the tourism office, because it was their idea,” he said. NEDCO began heavily promoting the “Spice Trail” through brochures, advertisements and social media.

“Over the next several years, it will be known in the Valley as the Spice Trail,” he said. “Over time, it will become the brand.”

Early action

Early action projects such as murals, façade improvements and branding campaigns may seem like modest efforts, but they’re consistent with the strategy LISC Phoenix applied successfully in other business corridors on the light rail line, including Mesa’s Main Street, on Camelback, and along McDowell Road. They can all point to increased business-owner involvement, engagement by municipal departments (planning, community development, police, etc.) and an infusion of investment – from new apartment buildings to grocery stores, markets, restaurants and other services.

And John Toliver, from the perspective of a longtime business owner on a corridor that’s seen dramatic change over the years, thinks the future’s bright even if it isn’t arriving as fast as he’d like.

Between the increasing number of ASU students and the large, relatively young workforce at State Farm, he sees the potential for a robust housing market along Apache – one that will be fueled by the light rail system.

“Young professionals will like living in 2-6 story condo buildings,” he said. “Close to the airport, to downtown, to light rail. It will be attractive.”

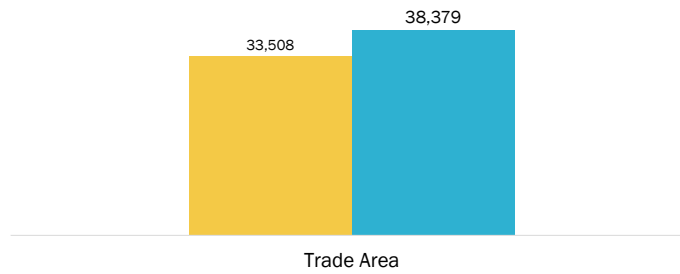
Gastelum agrees, but says city involvement will be a critical part of how Apache evolves.

“The city obviously plays a critical role,” he said. “One of NEDCO’s roles is to work with the city and businesses to be innovative and do things that are a little different. With Apache and the Spice Trail, it’s an opportunity for the city to make a huge impact with branding and adding street banners. The little things NEDCO and the City have done will several years down the road have a huge impact.” ■

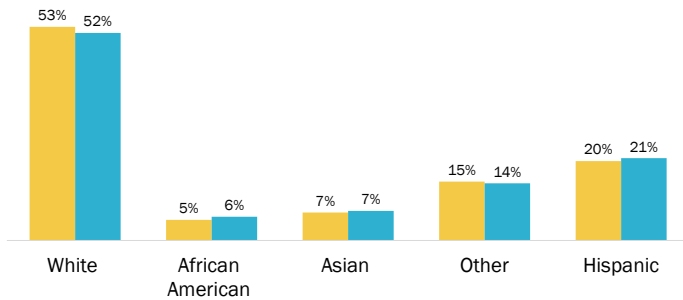
Then and Now

2014 2018

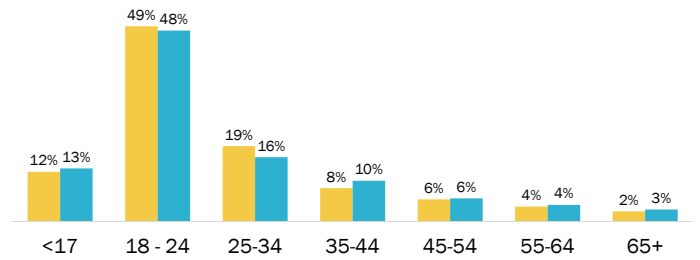
Total Population



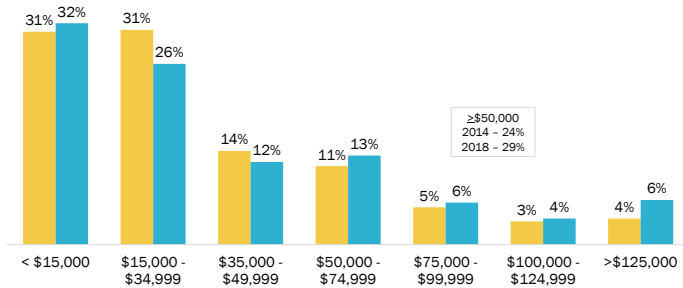
Race



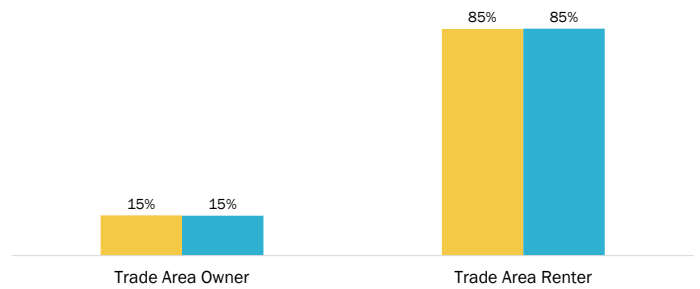
Age



Income



Tenure



Average Household Size



Educational Attainment

25 & older	2014	2018
Less than 9th grade	5%	6%
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Some college or Assoc. degree	34%	32%
Bachelor's degree	24%	22%
Post graduate degree	16%	18%

Retail Demand and Supply

2012 Trade Area Annual Expenditures

Category	Demand	Supply	Float	Float as % of Demand
Building Material & Garden Equipment	\$53,991,156	\$33,327,413	\$20,663,743	38%
Clothing & Clothing Accessories Stores	35,528,055	108,421,695	(72,893,640)	(205%)
Electronics & Appliances Stores	17,852,954	296,450,780	(278,597,826)	(1561%)
Food & Beverage Stores	90,887,764	50,037,920	40,849,844	45%
Foodservice & Drinking Places	96,303,475	272,077,491	(175,774,016)	(183%)
Furniture & Home Furnishings Stores	10,349,808	16,400,528	(6,050,720)	(58%)
General Merchandise Stores	80,165,913	63,724,191	16,441,722	21%
Health & Personal Care	20,594,372	30,634,337	(10,039,965)	(49%)
Miscellaneous Store Retailers	22,147,635	18,552,134	3,595,501	16%
Sporting Goods, Hobby, Book, & Music Stores	19,833,225	26,357,531	(6,524,306)	(33%)

2018 Trade Area Annual Expenditures

Category	Demand	Supply	Float	Float as % of Demand
Building Material & Garden Equipment	\$14,829,603	\$37,466,190	(\$22,636,587)	(153%)
Clothing & Clothing Accessories Stores	20,831,233	66,712,908	(45,881,675)	(220%)
Electronics & Appliances Stores	8,319,497	9,242,472	(922,975)	(11%)
Food & Beverage Stores	51,045,027	63,753,945	(12,708,918)	(25%)
Foodservice & Drinking Places	57,515,811	228,542,606	(171,026,795)	(297%)
Furniture & Home Furnishings Stores	6,294,892	10,704,497	(4,409,605)	(70%)
General Merchandise Stores	47,843,339	63,708,388	(15,865,049)	(33%)
Health & Personal Care	19,302,794	26,428,458	(7,125,664)	(37%)
Miscellaneous Store Retailers	7,361,121	20,858,975	(13,497,853)	(183%)
Sporting Goods, Hobby, Book, & Music Stores	6,487,696	16,075,271	(9,587,575)	(148%)

Buying Power

2014 Trade Area

Concentrated Buying Power: \$69 Million per Square Mile

Total Buying Power: \$361 Million

2018 Trade Area

Concentrated Buying Power: \$96 Million per Square Mile

Total Buying Power: \$498 Million

Strategic Opportunities: September 2014

Overarching: Locally supported businesses draw others to restaurants, and other stores to live, work, learn, and play

Housing: Selective, planned market rate housing could increase diversity, strengthen market; new home ownership could stabilize market and improve density; planned developments can leverage investment

Corridor: Residential market exists for basic services; coordinated promotion/marketing can increase penetration; strong pockets can anchor new investment; a BID or other organization can make Apache cleaner, safer, more attractive for everyone

Community: Early-action projects can build momentum; united community can attract resources, expand impact; linkages with University can support development

Infrastructure: Financing, incentives, can help fill ground floor retail; promotion coupled with available light rail can expand shopper base; new strategies can capture expanding residential market; Park and Ride offers TOD possibilities

Progress Report

■ Substantially completed In progress Not yet completed

Community Engagement

- Ongoing meetings and communication with TCAA, Escalante Community Center, Community Garden, Habitat for Humanity
- LISC addition of a new NFL football field in conjunction with Thew Elementary School
- Organized and coordinated engagement between and among organizations not yet ongoing

Small Business Development

- Monthly merchant meetings conducted
- 24 businesses participating in one-on-one or group technical assistance
- Micro-grants provided to Curry Corner, Tempe Comics and others
- 5 new façade/sign improvements completed

Commercial Corridor Beautification

- LISC support of streetscape landscaping nudged City to demo abandoned hotel next to new residential development
- Beautification plans completed with ASU School of Architecture for blocks between Terrace and McClintock, but not yet constructed
- 2 annual cleanups and landscape improvements completed at Apache and River
- 4 placemaking projects completed: community garden, banners installed
- Multiple murals painted, but many vacant lots are untended

Business Attraction

- Spice Trail branding and promotions completed: logo, Facebook page, articles by Tourism office
- Grand openings and promotions sponsored for several businesses, including Cre/Asian Bar and Grill, The Dhaba, Tasty Kabob, Curry Corner, Golden Restaurant, Haji Baba, and Mandi House
- New \$14 million Mountain Park Health Center, with LISC New Markets Tax Credits, brings investment, jobs, and quality health care to the Apache Trade Area
- Ground floor retail in mixed used buildings remains vacant
- No bank, no major healthcare options, few choices for coffee
- New streetcar to connect Apache Blvd with Downtown Tempe

Market Density

- Lennar development completed
- Habitat for Humanity in-fill townhomes completed and occupied
- Meridian at 101 senior housing completed and Metro 101 Apartments under construction
- More market rate and mixed income housing planned
- Homeownership continues to erode on the south side of Apache

Key Findings

Corridor Management

- State Farm and LISC support provided an opportunity for NEDCO to enter into corridor management.
- Regular business meetings, workshops, and promotions are beginning to create corridor energy.
- Staff and organizational changes at NEDCO have meant that corridor management has been slow to emerge.
- New City of Tempe contract with NEDCO is an important partnership.

The Market

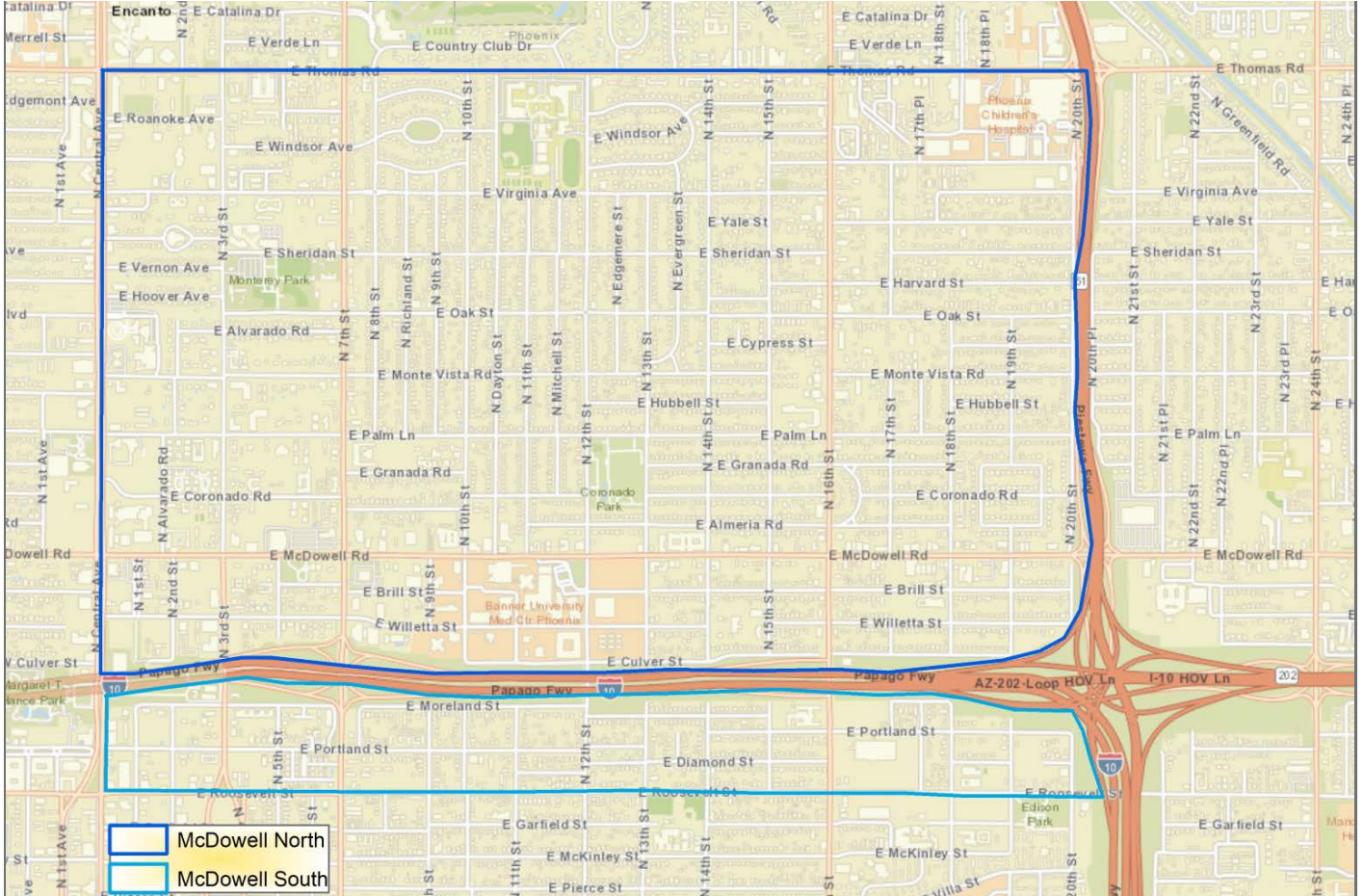
- 14% increase in population in the trade area
 - Increased density, more shoppers
 - More “eyes on the ground”
 - Vacant properties filled with new housing
- Buying Power has increased dramatically:
 - Concentrated Buying Power has increased from \$69 million per square mile in 2012 to \$96 million per square mile in 2018
 - Total Buying Power has increased from \$361 million in 2012 to \$498 million in 2018
- Growth of State Farm and Arizona State University create expanded demand for residential and commercial properties
 - Expansion of downtown exerts pressure on Apache while also creating opportunities
 - New commitment for streetcar will improve access for Apache businesses

Development and Change

- Marketing of the Spice Trail has supported growth of a diverse set of restaurants on the corridor
 - Facebook page, restaurant crawls, feature articles in tourism publications has attracted interest
 - Cre/Asian Bar & Grill, The Dhaba, Tasty Kabob, Curry Corner, Golden Restaurant, Haji Baba, and Mandi House offer a variety of Asian and Middle Eastern foods that are beginning to attract patrons from across the Valley
- New housing developments have increased density and grown the market:
 - NEXA by Lennar: 399 apartments + 4,300 sq ft of retail
 - Meridian@101 Senior Housing: 76 units
 - Metro 101 Apartments: 202 units
- Several murals, River Street beautification, bike racks, storefront renovation, and sign improvements have begun to create incremental, but noticeable change in the corridor’s appearance and image.
- Vacant storefronts in mixed use buildings on the corridor have remained empty from 2014 through the present. Revised City regulations and systematic incentives are necessary to reverse this undesirable feature of several buildings on Apache Blvd.
- Influx of students in housing market freezes out modest wage workers from State Farm and elsewhere.



McDowell PHX



While both North and South Area is the Convenience Trade Area for McDowell, the residential characteristics of each area are quite different, suggesting that a separate analysis would increase understanding about how to improve sales from each area.

The North Trade Area boundaries are:

- East:** I - 51
- West:** 7th Avenue
- North:** Thomas Road
- South:** I - 10

The South Trade Area boundaries are:

- East:** I - 51
- West:** 7th Avenue
- North:** I - 10
- South:** Van Buren

Goals

Improve appearance/
investment in McDowell for
residents, shoppers, employees,
and Banner patients

Increase access to goods
and services needed
by the Coronado and
Garfield neighborhoods

Develop a place where the
community will come together

Support growth of quality,
local businesses

Cultivate a sense of place
and a unique identity for the
corridor and the community

Assets

Banner Hospital anchors
the corridor, major employer,
investor, and traffic generator

Trellis is a longstanding force
for neighborhood improvement

Active civic organizations
with community pride

New and old investment in entire
trade area including Coronado
and Garfield communities

Strong, growing downtown
is spreading investment
to trade area

Substantial investment
and retail presence west
of Banner Hospital

Strong core of existing business
who have endured (Rainbow
Donuts, Ace Uniforms,
Ryan's Pet Supplies)

New businesses emerging
(Ollie Vaughn's, Smooth
Brew, Brass Monkey)

Sizable parcels of vacant
land available for
development and parking

Strong business, institutional,
and city interest in improvement

Challenges

Missing teeth in retail corridor;
gaps between businesses

Lack of ownership and thus use
of the corridor by the community

No unified marketing and
promotion of the corridor

Rapid traffic flies by
McDowell businesses

Deteriorated storefronts, vacant
property, and old entryway
give a dated, unkempt
appearance to street

Many residents are unaware
of existing businesses

Parking and the accessibility
of parking is problematic

City-owned lots are poorly
maintained and managed
and 16th Street north of
McDowell needs work

Crime and perception of
crime deter investment and
shopping; some businesses
need upgrading

McDowell from 16th to Route
51 has many vacancies
and lack of identity

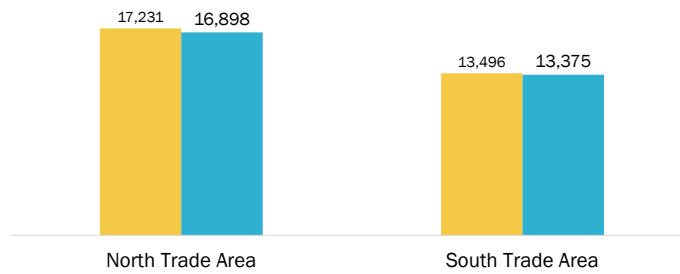
Coronado and Garfield
neighborhoods and McDowell
Trade Area are divided by I-10

Development is shifting
to Roosevelt

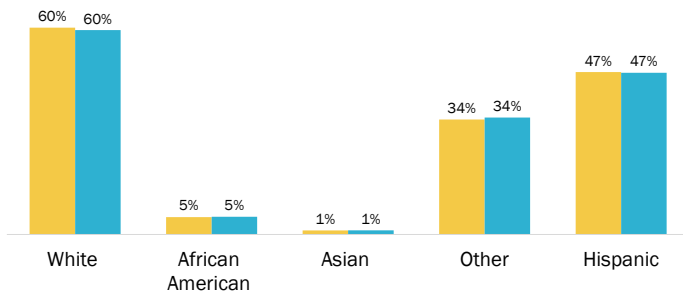
Then and Now

2016 2018

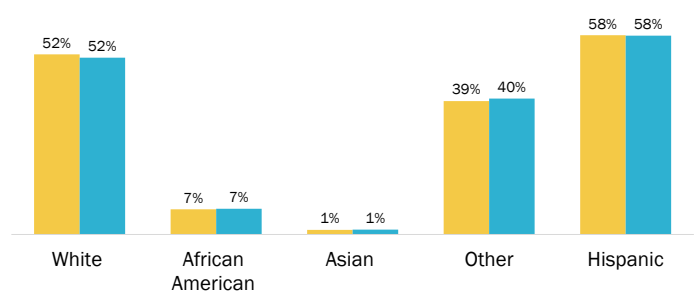
Total Population



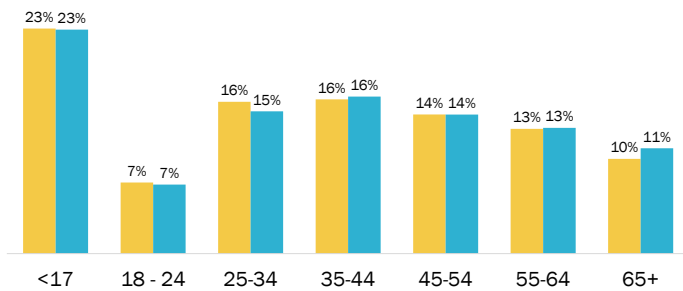
Race – North Trade Area



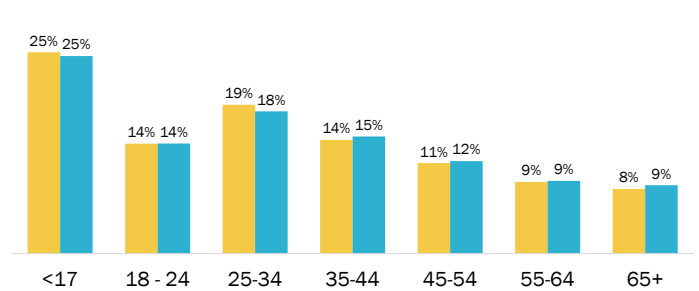
Race – South Trade Area



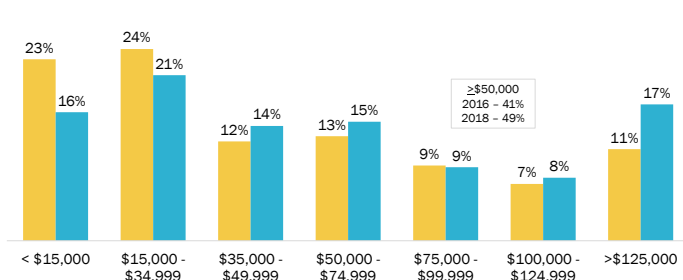
Age – North Trade Area



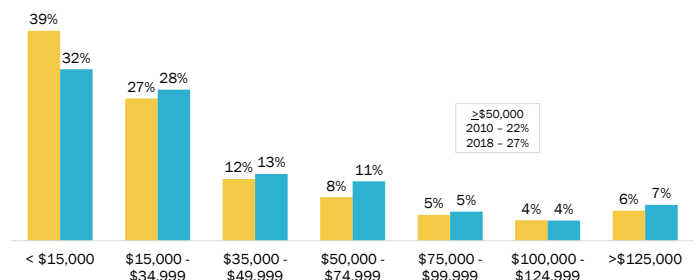
Age – South Trade Area



Income - North Trade Area

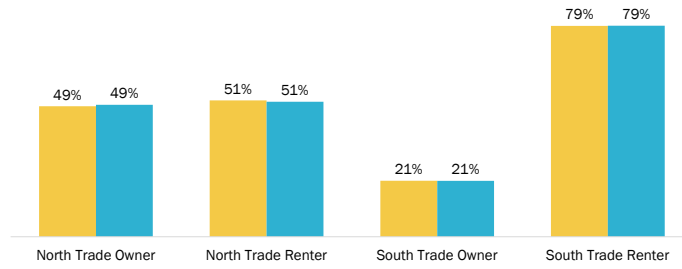


Income - South Trade Area

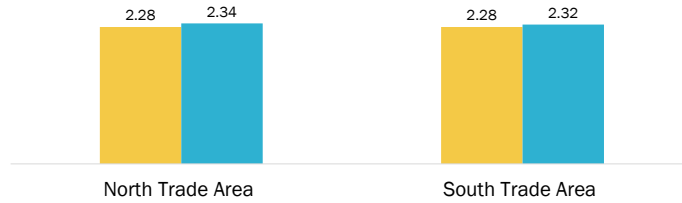


2016 2018

Tenure



Average Household Size



Educational Attainment - North Trade Area

25 & older	2016	2018
Less than 9th grade	14%	15%
Some high school, no diploma	9%	8%
High school diploma	19%	19%
Some college or Assoc. degree	24%	23%
Bachelor's degree	21%	20%
Post graduate degree	13%	14%

Educational Attainment - South Trade Area

25 & older	2016	2018
Less than 9th grade	22%	19%
Some high school, no diploma	10%	11%
High school diploma	23%	23%
Some college or Assoc. degree	24%	26%
Bachelor's degree	15%	13%
Post graduate degree	8%	8%

Retail Demand and Supply

2014 North Trade Area Annual Expenditures

Category	Demand	Supply	Float	Float as % of Demand
Building Material & Garden Equipment	\$27,253,589	\$7,503,339	\$19,750,250	72%
Clothing & Clothing Accessories Stores	12,621,376	12,733,275	(111,899)	(1%)
Electronics & Appliances Stores	5,064,049	5,669,857	(605,807)	(12%)
Food & Beverage Stores	37,876,016	10,967,621	26,908,395	71%
Foodservice & Drinking Places	32,926,739	88,735,398	(55,808,658)	(169%)
Furniture & Home Furnishings Stores	5,353,126	1,347,509	4,005,618	75%
General Merchandise Stores	30,930,035	6,152,539	24,777,496	80%
Health & Personal Care	12,364,731	33,777,796	(21,413,064)	(173%)
Miscellaneous Store Retailers	7,153,018	27,280,004	(20,126,986)	(281%)
Sporting Goods, Hobby, Book, & Music Stores	5,005,701	1,024,110	3,981,590	80%

2018 North Trade Area Annual Expenditures

Category	Demand	Supply	Float	Float as % of Demand
Building Material & Garden Equipment	\$18,391,955	\$12,353,252	\$6,038,703	33%
Clothing & Clothing Accessories Stores	14,200,516	18,975,799	(4,775,283)	(34%)
Electronics & Appliances Stores	5,335,822	3,083,197	2,252,625	42%
Food & Beverage Stores	37,543,146	32,900,083	4,643,063	12%
Foodservice & Drinking Places	39,190,242	86,592,868	(47,402,625)	(121%)
Furniture & Home Furnishings Stores	5,737,991	1,971,886	3,766,105	66%
General Merchandise Stores	35,255,283	3,006,643	32,248,640	91%
Health & Personal Care	15,773,455	40,204,363	(24,430,909)	(155%)
Miscellaneous Store Retailers	5,902,627	10,103,986	(4,201,358)	(71%)
Sporting Goods, Hobby, Book, & Music Stores	4,532,970	1,432,667	3,100,303	68%

2014 South Trade Area Annual Expenditures

Category	Demand	Supply	Float	Float as % of Demand
Building Material & Garden Equipment	\$15,407,363	\$14,345,397	\$1,061,966	7%
Clothing & Clothing Accessories Stores	8,923,074	7,057,008	1,866,066	21%
Electronics & Appliances Stores	3,728,292	8,488,903	(4,760,612)	(128%)
Food & Beverage Stores	27,436,079	3,388,444	24,047,635	88%
Foodservice & Drinking Places	24,528,569	52,073,882	(27,545,312)	(112%)
Furniture & Home Furnishings Stores	3,314,076	4,470,320	(1,156,245)	(35%)
General Merchandise Stores	21,401,752	14,398,533	7,003,220	33%
Health & Personal Care	6,983,069	6,456,590	526,479	8%
Miscellaneous Store Retailers	5,104,229	23,198,592	(18,094,364)	(354%)
Sporting Goods, Hobby, Book, & Music Stores	4,002,667	3,360,612	642,056	16%

2018 South Trade Area Annual Expenditures

Category	Demand	Supply	Float	Float as % of Demand
Building Material & Garden Equipment	\$6,812,075	\$15,195,169	(\$8,383,095)	(123%)
Clothing & Clothing Accessories Stores	7,792,600	6,609,080	1,183,519	15%
Electronics & Appliances Stores	2,925,996	13,196,083	(10,270,088)	(351%)
Food & Beverage Stores	21,477,945	15,749,106	5,728,839	27%
Foodservice & Drinking Places	21,262,373	78,839,489	(57,577,116)	(271%)
Furniture & Home Furnishings Stores	2,636,800	3,802,479	(1,165,679)	(44%)
General Merchandise Stores	19,806,233	3,510,918	16,295,315	82%
Health & Personal Care	8,671,323	9,309,959	(638,636)	(7%)
Miscellaneous Store Retailers	3,089,665	17,107,673	(14,018,007)	(454%)
Sporting Goods, Hobby, Book, & Music Stores	2,300,980	3,805,808	(1,504,828)	(65%)

Buying Power

2016 North Trade Area

Concentrated Buying Power: \$54 Million per Square Mile

Total Buying Power: \$252 Million

2016 South Trade Area

Concentrated Buying Power: \$ 25 Million per Square Mile

Total Buying Power: \$68 Million

2018 North Trade Area

Concentrated Buying Power: \$97 Million per Square Mile

Total Buying Power: \$455 Million

2018 South Trade Area

Concentrated Buying Power: \$76 Million per Square Mile

Total Buying Power: \$205 Million

Strategic Opportunities: August 2016

Organize the small business community leadership

- Convene meeting of local businesses
- Explore business interest in forming an association and reach out to additional businesses
- Organize and plan initial kick-off event
- Coordinate and sponsor a community-oriented promotion
- Engage with Banner Hospital and bring them to the table

Launch community led business improvement effort

- Engage with neighborhood organizations to participate in corridor clean-up/beautification
- Organize nearby neighbors to shop/eat locally participate in promotion
- Meet with City about vacant and municipally-owned lots
- Meet with Police to address trouble spots

Improve the physical appearance of the corridor

- Cleanup/beautification focus on public spaces including City-owned lots and vacant properties
- Plan/coordinate murals or other art on the corridor
- Arrange signage for existing parking lots
- Do white box treatment on selected vacant storefronts/place art or displays in windows

Progress Report

■ Substantially completed In progress Not yet completed

Organize the small business leadership

- Convene businesses, form an association
 - Organize a kick-off event
 - Coordinate community-oriented promotion
-

Launch community led corridor improvement effort

- Engage neighborhood organizations in cleaning and beautifying McDowell
 - Encourage local organizations and residents to eat and shop on the corridor
 - Support local organizations in “owning” the corridor
-

Implement 5 visible early action projects on the corridor

- Plan and organize short-term, visible projects that can be completed in 90-180 days to create community engagement, build enthusiasm, and momentum for change (e.g., murals, clean-ups, landscaping, façade improvements, new signs)
-

Target beautification, improvements, and projects between Banner and 16th

- Strengthen existing businesses, clean up facades, streetscape, and poorly maintained properties
 - Create a welcoming environment for new shoppers
 - Arrange for signage and cleanup of existing parking lots
-

Promote and market businesses, corridor improvements, and success stories

- Change perceptions of the corridor, highlighting investment
 - Change the community narrative through business promotions, community events, blog posts, and social media
 - Establish a regular promotion and events schedule
-

Organize an “image campaign” to establish a positive identity for the McDowell corridor

- Consider the development of a “Wellness Corridor” that builds upon existing strengths (e.g., hospital, medical offices, Brass Monkey, active lifestyle uses)
 - Schedule and implement a “placemaking” campaign to establish a new image and identity for McDowell
-

Key Findings

Corridor Management

- Trellis is committed to corridor work
- Full time corridor manager was hired
- Funds have been raised from NeighborWorks and LISC
- Miracle Mile Merchant Association was formed
- Established partnership with Phoenix Community Alliance

The Market

- Population has decreased slightly, down 2% in the North Trade Area and 1% in the South Trade Area from 2016 to 2018.
- In 2 years, the North Trade Area has seen an increase of 560 households with incomes above \$50,000 annually. The South Trade Area has seen an increase of 233 additional households with incomes above \$50,000 annually.
- In 2 years, the North Trade Area has seen a decrease of 702 households with incomes below \$25,000 per year. The South Trade Area has seen a decrease of 354 households with incomes below \$25,000 per year.
- The Concentrated Buying Power in the North Trade Area has increased from \$54 million per square mile to \$97 million per square mile. The Concentrated Buying Power in the South Trade Area has increased from \$25 million per square mile to \$76 million per square mile.
- The commitment of Banner Medical Center to a \$500 million expansion program is beginning to impact the market. New buildings, employees, visitors, and patients have the potential to increase daytime traffic considerably, bringing opportunities for food service, entertainment, health-related services, and retail
- Approximately \$24 million of health and personal care expenditures are coming into the North Trade Area in 2018 from outside its borders, up from \$21 million in 2014

Development and Change

Community Beautification and Improvement:

- Regular corridor cleanups organized (Earth Day, Miracle Mile Fall Cleanup)
- 19 new trees planted
- Partnered with City, schools, neighborhood associations
- Agreement with City to maintain, acquire, sign, and use 4 parking lots

Entrepreneurship Support:

- Hosted business finance workshops with LISC, Kiva, and Acción
- Hosted a social media and marketing workshop for business owners
- Sponsored community coffee on McDowell with city council member
- Promoted Small Business Saturday
- Sponsored GoDaddy Technical Assistance digital workshop
- Smooth Brew/Banner Health/Phoenix Children's promotion

Marketing and Image Campaign:

- Created a new logo and Facebook page
- Repainted the Miracle Mile arch
- Hosted a brand unveiling and community celebration
- Features on LISC website, Voyage Phoenix Magazine, Check Please AZ, Phoenix New Times

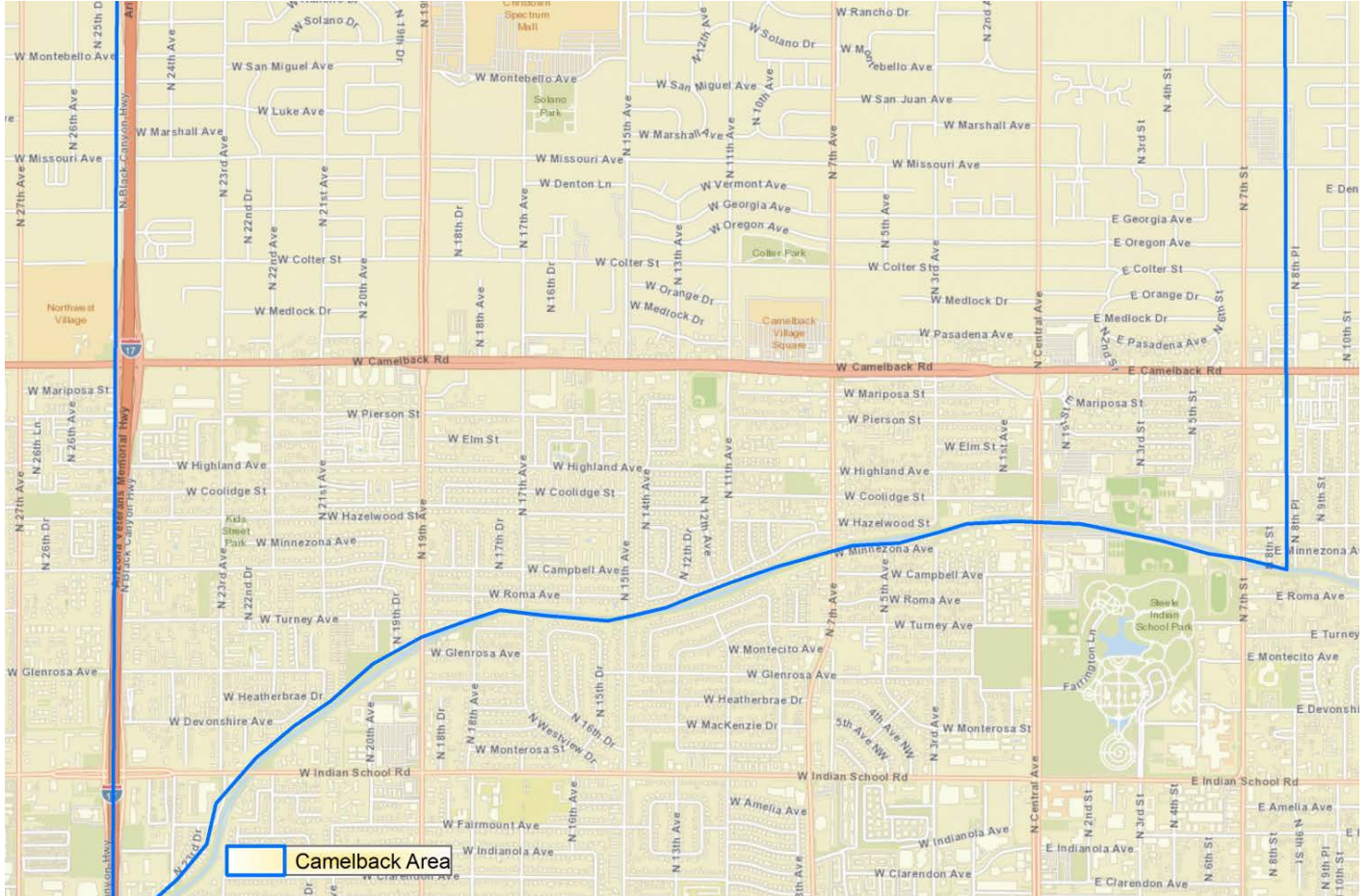
Business Retention and Attraction:

- Promoted existing small businesses on Facebook page: Laz Barber Shop, The Wheel Shop, Ollie Vaughn's, Tacos Chíwas, Palabras, Smooth Brew
- New businesses: Rubymint General, McDowell Market, Palabras Bilingual Bookstore, Shanti Yoga, Mucho Más Art Studio
- Substantial medical community on and off the corridor





Camelback



The Camelback Trade Area like Apache includes several different neighborhoods which, if taken separately have distinct characteristics, such as in the predominance of renters vs. homeowners.

The Camelback Trade Area boundaries are:

East: Central Avenue

West: I - 17

North: E Bethany Home Road

South: Grand Canal (Water Body)

Goals

To provide information that will assist LISC Phoenix to determine whether and how to catalyze economic improvements on Camelback Road geared to serving local residents

To prepare a baseline inventory of commercial and institutional interests on Camelback

To evaluate market readiness for various stakeholder suggested investments including Valley Metro, City of Phoenix, Local First Arizona, IRC, neighborhood advisory and business groups

To suggest short term strategies to improve opportunities for current residents and community business interests

Assets

Young families with children dominate the markets

Safe affordable housing options for immigrant and refugee communities south and north of Camelback in both traditionally subsidized housing and small rental buildings

Middle income households make up at least a third of the market and over 68% of the households have graduated from high school or better

Area has a dozen or more classic retail strips including Camelback Village Mall which includes a drive-thru Starbucks, McDonalds, Office Max and Fry's. El Super is scheduled to occupy a whole block parcel between 22 and 23rd Ave which would serve immigrant and non immigrant communities that make up much of the demographic west of 7th Avenue

Eating and drinking choices (beyond Subway and McDonald's) include over a dozen Latino, Asian, and other ethnic cuisines

Several educational institutions and service organizations on corridor represent a market opportunity and potential partners

Challenges

Camelback is a long and diverse road designed to serve folks crossing from Hwy 17 to destinations on Camelback east of Central and to travel to the 51 and the West Valley. The street is auto focused rather than pedestrian oriented

Despite several healthy commercial projects, there are whole blocks which are under developed and others occupied by buildings which are 100% vacant

Area is home to several destination business anchors including Christown Spectrum Mall, with a Target, Costco, Home Depot, limiting the potential for retail on Camelback

Impact of big public projects (e.g., the plan to run a freeway extension north of Camelback) changed the residential character and brought rental and nonresidential uses within the neighborhoods

Minimal market rate rental housing exist in the market

Quality retailers are scattered throughout the trade area but not concentrated in any one location or necessarily on the corridor

Retail Development on West Camelback

Community groups, city take lead in making neighborhood better and stronger

When Zaza Wright was looking to expand her day care center, a stretch of Phoenix's West Camelback Road caught her attention. Which is saying something, because Camelback between, say, 7th and 19th avenues isn't attention getting in the conventional sense.

Just the opposite – an expanse of strip shopping centers, large parking lots, schools, struggling businesses, and under occupied office buildings . The sort of place one passes through while going elsewhere. But it had what Wright wanted – a large space at a reasonable cost. And, a light rail line that the parents of the children she looked after could use to deliver their kids to the day care center and re-board to get to their jobs.



Zaza Wright opened Immanuel Care for Children on West Camelback Road. Many of the children she cares for are delivered by their parents via light rail.

From the outside, Wright's Immanuel Care for Children, at 1620 W. Camelback Road, isn't much to look at – your basic stucco strip shopping center façade. But inside it's an attractive collection of spacious rooms full of energetic kids, from babies to 12-year-olds. Most are in the 2-month to five-year range.

"The space had been empty for years," said Wright, 44, who's from Burkina Faso in West Africa and has lived in the U.S. for the last two decades. "The light rail line was a huge consideration. Our playground is now full of strollers."

Light rail rules

Many of her light rail customers not only deposit children at Immanuel

Care, but also their strollers. Wright hadn't designed her space as a stroller parking lot and consequently leaves the carriages in what was intended as a playground – a minor glitch for a successful business that now accommodates about 90 children. And Wright, an instinctive entrepreneur, isn't done. She has a background in restaurant and hotel management and would like to branch out into the food business, maybe starting with a food truck.

Wright, with her enthusiasm, her business instincts and infectious personality, is the type of entrepreneur that several entities, including LISC Phoenix, the City of Phoenix, the International Rescue Committee (IRC) and Local First Arizona are working to attract to the wide open spaces of West Camelback, where rents are affordable and the light rail provides an efficient way for customers and workers to go to and from.

It's one of the commercial corridors LISC Phoenix, in its "Our Future is on the Line" strategy established in 2010, has slated for redevelopment. The nonprofit's also working on nearby McDowell Avenue, on Mesa's Main Street, and Tempe's Apache Boulevard in a similar capacity. The thinking is that Phoenix is poised for significant population increases over the next decade, that residential and commercial development will have to occur somewhere, and that the best place for it will be along Valley Metro's 26-mile light rail line.

"Our initial strategy is around filling vacancies on the corridors and bringing jobs there," said Terry Benelli, LISC Phoenix's executive director. Working with LISC on Camelback is IRC, which for years has offered immigrants to Phoenix a variety services, ranging from education to housing. Business development represents a new focus for IRC.

"This is an expansion of what we do," said Donna Magnuson, IRC's executive director. "It's the empowerment of people to become engaged in their own communities. We see the corridor as part of our home because refugees have been resettled here for a long time."

MetroEdge retail scan

One of the first actions was to get a retail scan from MetroEdge, LISC's retail marketing firm, to establish baseline information, such as what types of jobs were available, the amount of money current businesses on the corridor attracted, and the amount of money that neighborhood residents spent elsewhere.

For Isaac Jensen, IRC's corridor manager, that information was essential as he lobbied current businesses to stay on Camelback and new ones to move in.

Isaac Jensen, IRC's retail corridor manager, and Nora Alhaddad, a former IRC worker who now coordinates commercial corridor revitalization efforts for LISC Phoenix.





David Longoria, chief of staff for Councilwoman Laura Pastor, is heavily engaged in redevelopment work along the city's commercial corridors.

"LISC provided me with materials ahead of time," he said. "They had done the study, had traffic counts, dollars spent, etc. They had the data."

"It (the MetroEdge scan) gave us a good sense of where we were at and the direction we need to head," added Benelli. "And what early actions we could take."

Jensen, like Aislyn Richmond, his counterpart working the McDowell corridor, spearheaded early action projects such as neighborhood cleanups, organizing the twice-annual World Bazaar community market at city-owned parking lots, and promoting communication among Camelback merchants.

Helping Jensen and Richmond in these efforts is Nora Alhaddad, a former IRC worker whose duties as an assistant program officer at LISC Phoenix involve assisting commercial corridor managers and helping small business obtain financing to expand.

"We try to connect all these pieces," she said. As an example, IRC's aquaponics facility, which it built to harvest tilapia, attracted the attention of the nearby AmeriSchools charter, which is now educating its students in hydroponic farming techniques.

And Alhaddad helps Jensen and Richmond keep in touch and share information about their successes, and in some cases their failures – so that they know they're not alone.

Community organizations on front lines

"We want to make sure we're part of their community," Jensen said about the merchants he works with. "So you go to Planet Fitness or the child care center and you create a daily presence by talking about what's going on. 'Hey, did you hear there's a development project for that empty lot?' It creates conversation and buzz about things that are happening."

It's challenging work. The stretch of Camelback has a reputation for crime and homelessness.

"There is a criminal element at 19th and Camelback," said David Longoria, chief of staff to District 4 Councilwoman Laura Pastor, in whose district Camelback lies. "I don't want to sugarcoat it. People in the community don't want to hear that. Regardless of the numbers, they think it's unsafe. So we need to go in there and show in good faith that we're doing something. We can't accept 'no.'"

The city, said Longoria, can be the entity that pulls people together to revitalize business corridors like Camelback, but that groups like LISC and IRC need to carry it to the next level.

"Building something sustainable is what we want," he said. "And we want that to be in the hands of the people."

A typical stretch of West Camelback between 7th and 19th avenues.



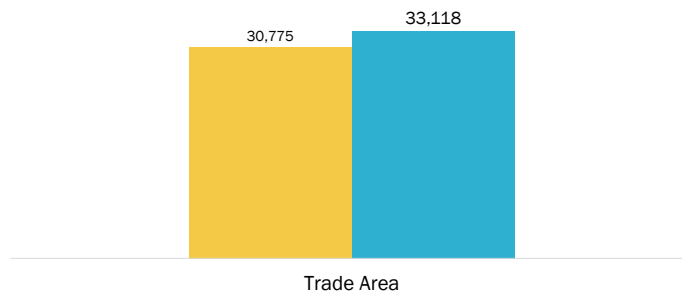
That suits Donna Magnuson, IRC's executive director.

"I'm a dreamer," she said. "We could do mini markets in a courtyard here (outside IRC's office on Camelback). We want to bring IRC training to the community instead of taking the community to training (at IRC's Glendale offices). We could do civics classes at Goodwill (on Camelback). We have a strong partnership with Catholic Charities (located nearby). We do English-based vocational training. If El Super (a new grocery on Camelback) wants to hire more people, we can train them. We want to be the bridge. We hope we're here a long time. ■

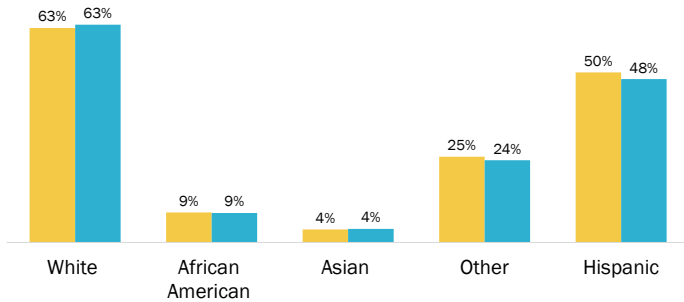
Then and Now

2016 2018

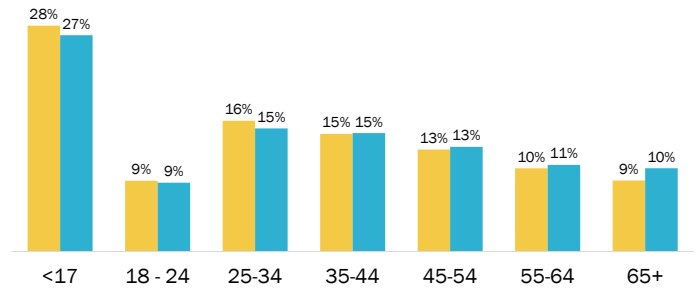
Total Population



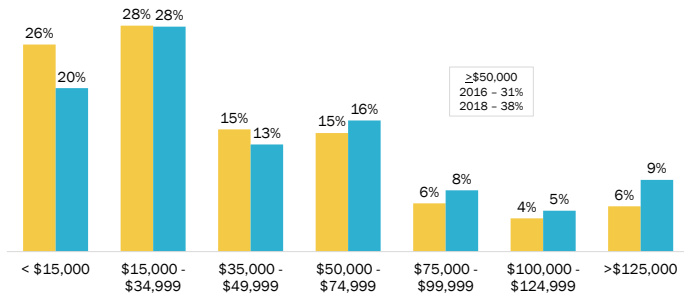
Race



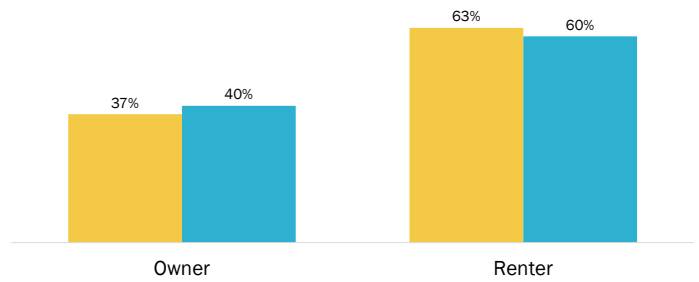
Age



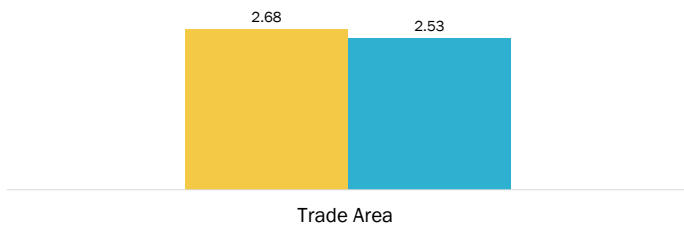
Income



Tenure



Average Household Size



Educational Attainment

25 & older	2016	2018
Less than 9th grade	11%	11%
Some high school, no diploma	15%	13%
High school diploma	23%	24%
Some college or Assoc. degree	32%	31%
Bachelor's degree	11%	13%
Post graduate degree	8%	8%

Retail Demand and Supply

2016 Trade Area Annual Expenditures¹

Category	Demand	Supply	Float	Float as % of Demand
Building Material & Garden Equipment	\$35,718,727	\$10,578,943	\$25,139,784	70%
Clothing & Clothing Accessories Stores	17,956,978	22,512,183	(4,555,205)	(25%)
Electronics & Appliances Stores	6,796,775	10,734,796	(3,938,021)	(58%)
Food & Beverage Stores	57,084,247	13,270,224	43,814,023	77%
Foodservice & Drinking Places	45,922,596	58,674,525	(12,751,929)	(28%)
Furniture & Home Furnishings Stores	7,107,242	3,773,980	3,333,262	47%
General Merchandise Stores	46,020,483	545,942,214	(499,921,731)	(1086%)
Health & Personal Care	17,256,902	26,721,937	(9,465,035)	(55%)
Miscellaneous Store Retailers	10,215,267	6,947,450	3,267,817	32%
Sporting Goods, Hobby, Book, & Music Stores	7,016,818	5,909,047	1,107,771	16%

2018 Trade Area Annual Expenditures

Category	Demand	Supply	Float	Float as % of Demand
Building Material & Garden Equipment	\$26,286,128	\$24,900,040	\$1,386,088	5%
Clothing & Clothing Accessories Stores	21,564,243	37,798,614	(16,234,370)	(75%)
Electronics & Appliances Stores	8,074,973	6,231,478	1,843,494	23%
Food & Beverage Stores	61,658,853	37,334,336	24,324,518	39%
Foodservice & Drinking Places	59,981,291	122,031,281	(62,049,991)	(103%)
Furniture & Home Furnishings Stores	8,230,640	6,685,903	1,544,737	19%
General Merchandise Stores	57,150,023	285,491,557	(228,341,534)	(400%)
Health & Personal Care	25,689,340	38,490,688	(12,801,347)	(50%)
Miscellaneous Store Retailers	9,160,730	16,320,501	(7,159,772)	(78%)
Sporting Goods, Hobby, Book, & Music Stores	6,762,914	10,149,463	(3,386,549)	(50%)

¹ The Christown Spectrum Mall includes several large retailers that represent a significant in flow of business in the General Merchandise category.

Buying Power

2016 Trade Area

Concentrated Buying Power: \$64 Million per Square Mile²

Total Buying Power: \$339 Million

2018 Trade Area

Concentrated Buying Power: \$117 Million per Square Mile

Total Buying Power: \$625 Million

Strategic Opportunities: December 2016

Organizational

- Metro Edge began this work without a local organization. A key element of the work was to identify and evaluate possible local partners.
- The Assessment was therefore divided into two phases: identification of local capacity and data analysis; and support and coaching for the lead agency to insure that implementation would be done well. The IRC was both competent and is now available

Support local entrepreneurship

- Assist IRC and Local First Arizona in growing area businesses
- Provide technical assistance and support to refugee and immigrant-owned businesses
- Continue and grow the World Bazaar and establish additional pop-up bazaars
- Promote and market local businesses to civic groups and schools
- Promote and market local businesses to new and renovated apartments and office tenants

Create readiness for investment and development

- Engage civic organizations and local institutions in cleanup and fixup programs
- Establish joint community and business public safety program
- Promote and support corridor storefront improvement and façade renovations
- Regularly communicate positive stories and improvements to residents, businesses, and shoppers

Focus development efforts to maximize impact

- Concentrate on key nodes: Camelback at 7th, 17th, and 19th Avenues
- Support existing businesses and target investment around them
- Fill vacancies in quality shopping centers and office buildings: 1620-1650 Camelback strip center, 17th and Camelback shopping center

² A substantial increase in Buying Power was driven by a combination of an 8% increase in population and increases in income levels of those making \$50,000 and above, driven by changes in the national economy.

Progress Report

■ Substantially completed □ In progress □ Not yet completed

Support local entrepreneurship

- IRC engaged in Camelback corridor business assistance
- Workshops and consulting assistance coordinated by IRC and provided by Local First Arizona and others
- World Bazaar has continued and grown to more than 40 merchants
- Several “pop-up markets” have been held at 17th and Camelback
- Promote and market local businesses to civic groups and schools
- Promote and market local businesses to new and renovated apartments and office tenants

Create readiness for investment and development

- Two corridor cleanups held with participation from area organizations and schools
- Joint community and business public safety program under discussion
- IRC has encouraged corridor storefront improvement and façade renovations
- Some positive stories and improvements have been communicated to residents, businesses, and shoppers through Facebook page
- Partnership established with city council member and city staff

Focus development efforts to maximize impact

- Cleanups, promotion and marketing have focused on 17th and Camelback
- New Native American Connections and Urban188 residential properties are bringing more residents, potential shoppers, and investment to corridor
- Efforts to fill vacancies in quality shopping centers and office buildings: 1620-1650 Camelback strip center, 17th and Camelback shopping center in early stages
- New El Super Shopping Center brings investment, jobs, and shopping choices to the corridor

Key Findings

Corridor Management

- IRC has taken on leadership of the corridor, hired a competent corridor manager and begun ongoing programming
- Corridor manager is developing strong relationships with area businesses, residents, schools, and city council member’s office
- Local First Arizona has run several small business workshops

The Market

- The Camelback Road Trade Area has seen an 8% increase in population from 2016 to 2018.
- The population increase has occurred in people of all races: White, African-American, Asian, Hispanic, and Others.
- The Trade Area has seen an increase of nearly 1,900 individuals between the ages of 25 and 54 from 2016 to 2018, the demographic that traditionally spends the most for consumer items.

- The senior population (65 and above) has increased by 921 individuals in 2 years.
- Since 2016, the Trade Area has seen an increase of over 1,000 additional households earning more than \$50,000 annually.
- New construction has resulted in the addition of several new housing developments in the Trade Area.
- New rental properties on Camelback Road (Camelback Pointe, Urban188) add potential shoppers for area merchants.
- Concentrated Buying Power in the Camelback Road Trade Area has increased from \$64 million per square mile in 2016 to \$117 million per square mile in 2018

Development and Change

Organizational Capacity

- IRC has taken on leadership of the corridor, hired a competent corridor manager and begun ongoing programming
- Corridor manager is developing strong relationships with area businesses, residents, schools, and city council member's office
- Local First Arizona has run several small business workshops

Community Beautification and Improvement

- IRC has sponsored several cleanups and MLK day of service with local schools, residents, and businesses
- Aquaponics property has been improved, trees planted
- "Color the Corridor" Community Painting project held

Entrepreneurship Support

- World Bazaar Phoenix Community Market supports refugee and immigrant businesses, expanded to twice per year
- Camelback Community Pop-Up Markets held
- Camelback Corridor Business Mixers held on Camelback

Marketing and Image Campaign

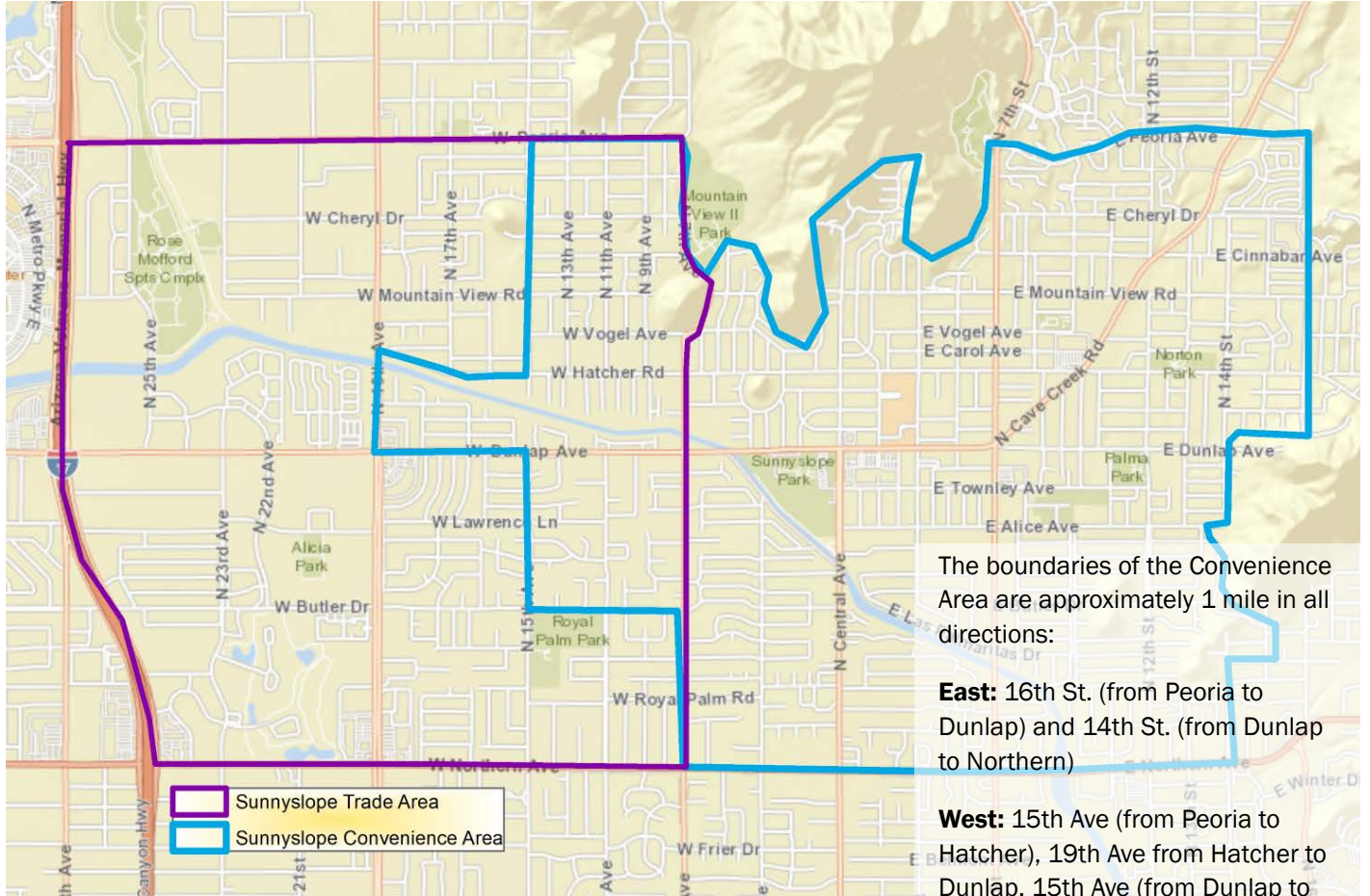
- Grand opening held for Camelback Pointe housing development
- Community Night Out at Milk Run promoted local businesses
- Lunchtime food posts encourage residents to eat local

Business Retention and Attraction

- El Super Shopping Center opened at 23rd and Camelback with 140 new jobs
- Several new businesses opened in El Super Shopping Center
- PT Noodles Restaurant opened spring 2018



Sunnyslope



The boundaries of the Convenience Area are approximately 1 mile in all directions:

East: 16th St. (from Peoria to Dunlap) and 14th St. (from Dunlap to Northern)

West: 15th Ave (from Peoria to Hatcher), 19th Ave from Hatcher to Dunlap, 15th Ave (from Dunlap to Butler) and 7th Ave (from Butler to Northern)

North: Peoria Ave

South: Northern Ave

The boundaries of the Trade Area are approximately 1 mile in all directions:

East: 7th Ave

West: I-17

North: Peoria Ave

South: Northern Ave

The Convenience Retail Area, or Convenience Area typically includes traditional “Saturday morning” shopping needs such as pharmacies, groceries, dry cleaners or hardware stores. The boundaries include the residential community that would be expected to shop in the area if well supplied. Customers typically prefer to find these goods and services within a 10-minute walking or driving distance of their home.

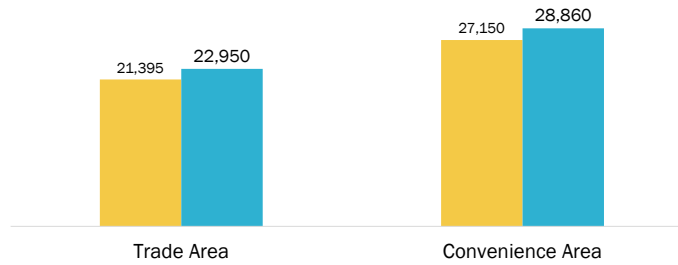
The Sunnyslope Trade Area includes principally “business to business” retail and related commercial uses. The customer base may include a large swath of the Valley. As such this study focused on two different types of markets with different suggested strategies.

Goals	Assets	Challenges
<p>Inform Desert Mission Neighborhood Renewal and LISC Phoenix regarding current retail activity</p>	<p>Sunnyslope has assets necessary to support continued improvements along the Hatcher Road corridor:</p>	<p>Decreasing population over the past 10 years</p>
<p>Focus efforts to retain or improve the mix of business opportunities</p>	<p>55.3% of the population is 35 years or younger</p>	<p>48% of the population earns less than \$35,000</p>
<p>Guide future investment decisions in the corridor</p>	<p>36% of households earn \$50,000 or above</p>	<p>Hatcher Road is not primarily a retail corridor; retail density is weak, making it difficult to sustain a long term, successful commercial corridor effort</p>
<p>Support Desert Mission Neighborhood Renewal and its partners in determining its ongoing commercial development strategy</p>	<p>75% of residents over 25 years of age have at least a high school diploma</p> <p>In 2011, total buying power in the community was \$423 million per square mile</p>	<p>As health and service providers local partners do not have a primary focus on retail development</p>
	<p>Hatcher Road has a mix of retail, institutional and residential uses. Two specific sub-markets support each other while relying on two different customer groups:</p> <p>The first group includes the local community and those driving to and from work in the community (3,600 employees at the hospital)</p> <p>The second market is an area west of Central where the principal businesses are destination oriented goods and services ranging from the Humane Society Shelter to Preach Building Supply.</p> <p>John C. Lincoln Hospital draws substantial daytime traffic</p>	<p>Concentration of poorly maintained properties – rental and commercial, on or adjacent to the corridor</p>

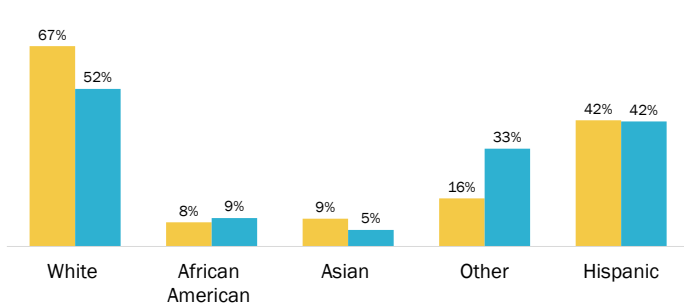
Then and Now

2010 2018

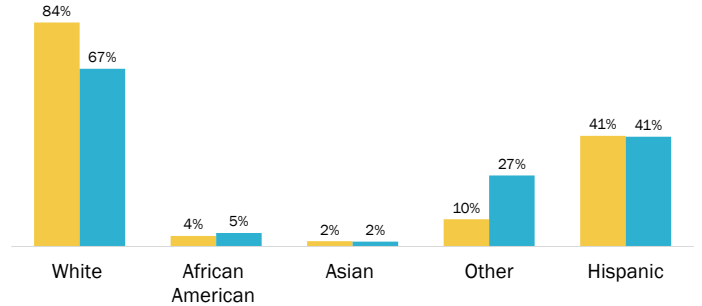
Total Population



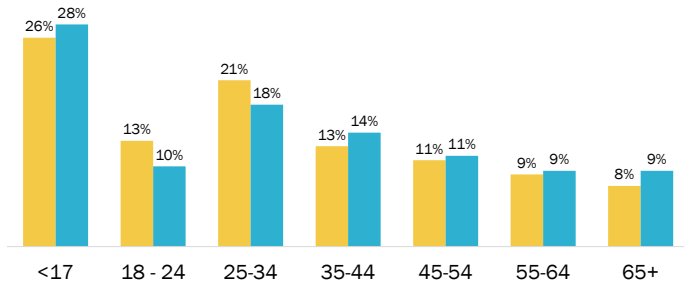
Race - Trade Area



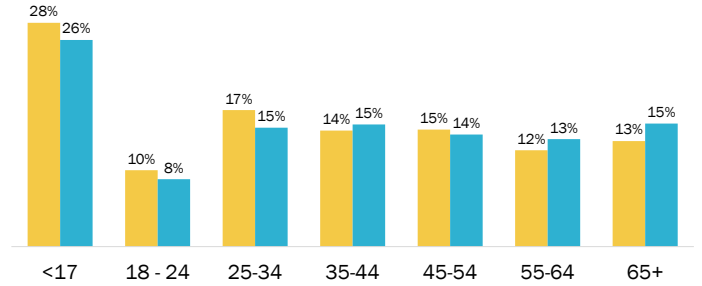
Race - Convenience Area



Age - Trade Area



Age - Convenience Area



Income - Trade Area

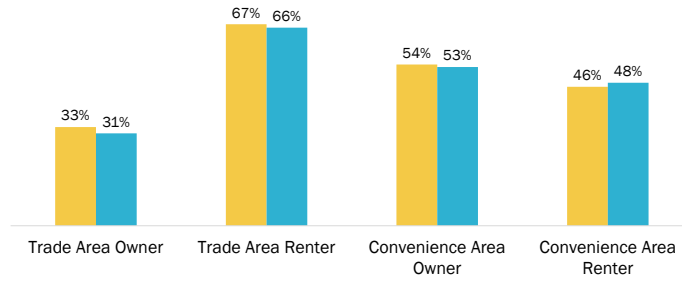


Income - Convenience Area

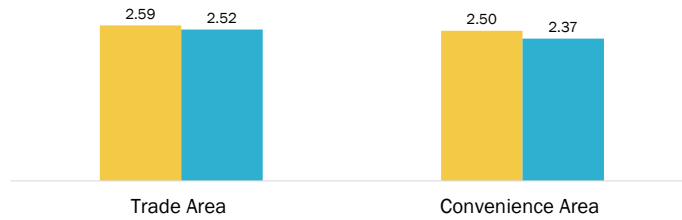


2010 2018

Tenure



Average Household Size



Educational Attainment

25 & older	2010	2018
Less than 9th grade	10%	8%
Some high school, no diploma	12%	13%
High school diploma	26%	22%
Some college or Assoc. degree	30%	30%
Bachelor's degree	12%	17%
Post graduate degree	9%	10%

Retail Demand and Supply

2010 Trade Area Annual Expenditures

Category	Demand	Supply	Float	Float as % of Demand
Building Material & Garden Equipment	\$25,100,000	\$36,200,000	(\$11,100,000)	(44%)
Clothing & Clothing Accessories Stores	14,500,000	5,360,000	9,140,000	63%
Electronics & Appliances Stores	7,130,000	8,540,000	(1,410,000)	(20%)
Food & Beverage Stores	44,200,000	43,600,000	600,000	1%
Foodservice & Drinking Places	35,500,000	42,400,000	(6,900,000)	(19%)
Furniture & Home Furnishings Stores	5,660,000	13,100,000	(7,440,000)	(131%)
General Merchandise Stores	41,600,000	13,100,000	28,500,000	69%
Health & Personal Care	14,500,000	19,100,000	(4,600,000)	(32%)
Miscellaneous Store Retailers	7,370,000	5,690,000	1,680,000	23%
Sporting Goods, Hobby, Book, & Music Stores	5,980,000	4,750,000	(1,230,000)	(21%)

2018 Trade Area Annual Expenditures

Category	Demand	Supply	Float	Float as % of Demand
Building Material & Garden Equipment	\$17,543,145	\$14,589,687	\$2,953,458	17%
Clothing & Clothing Accessories Stores	15,777,161	3,372,331	12,404,829	79%
Electronics & Appliances Stores	5,814,352	6,535,272	(720,921)	(12%)
Food & Beverage Stores	43,554,133	98,553,365	(54,999,232)	(126%)
Foodservice & Drinking Places	42,835,500	49,962,059	(7,126,559)	(17%)
Furniture & Home Furnishings Stores	5,772,532	4,300,914	1,471,618	25%
General Merchandise Stores	40,539,520	11,913,682	28,625,838	71%
Health & Personal Care	17,938,973	18,427,174	(488,200)	(3%)
Miscellaneous Store Retailers	6,419,275	10,286,301	(3,867,026)	(60%)
Sporting Goods, Hobby, Book, & Music Stores	4,914,641	5,104,258	(189,617)	(4%)

2010 Convenience Area Annual Expenditures¹

Category	Demand	Supply	Float	Float as % of Demand
Building Material & Garden Equipment	\$36,300,000	\$25,000,000	\$11,300,000	31%
Clothing & Clothing Accessories Stores	19,200,000	912,000	18,288,000	95%
Electronics & Appliances Stores	9,540,000	8,420,000	1,120,000	12%
Food & Beverage Stores	60,400,000	25,300,000	35,100,000	58%
Foodservice & Drinking Places	46,600,000	21,700,000	24,900,000	53%
Furniture & Home Furnishings Stores	7,980,000	3,960,000	4,020,000	50%
General Merchandise Stores	56,800,000	19,900,000	36,900,000	65%
Health & Personal Care	21,700,000	22,800,000	(1,100,000)	(5%)
Miscellaneous Store Retailers	10,100,000	3,840,000	6,260,000	62%
Sporting Goods, Hobby, Book, & Music Stores	8,000,000	2,390,000	5,610,000	70%

2018 Convenience Area Annual Expenditures

Category	Demand	Supply	Float	Float as % of Demand
Building Material & Garden Equipment	\$30,559,050	\$6,882,314	\$23,676,737	77%
Clothing & Clothing Accessories Stores	21,617,413	4,010,271	17,607,142	81%
Electronics & Appliances Stores	8,293,600	2,614,980	5,678,620	68%
Food & Beverage Stores	61,615,975	35,723,472	25,892,503	42%
Foodservice & Drinking Places	61,531,004	37,437,316	24,093,689	39%
Furniture & Home Furnishings Stores	8,838,905	4,849,990	3,988,915	45%
General Merchandise Stores	57,254,248	23,232,987	34,021,262	59%
Health & Personal Care	26,520,106	23,623,430	2,896,676	11%
Miscellaneous Store Retailers	9,495,845	7,462,601	2,033,244	21%
Sporting Goods, Hobby, Book, & Music Stores	7,045,436	1,424,296	5,621,140	80%

¹ In 2010, the presence of the hospital in the float numbers suggests supply exceeds demand. The demand grows in the subsequent 8 years, indicating that new and old residents are acquiring goods and services outside the community.

Buying Power

2012 Convenience Area

Concentrated Buying Power:

\$64 Million Dollars per Square Mile

Total Buying Power: \$423 Million

2018 Trade Area

Concentrated Buying Power :

\$83 Million per Square Mile

Total Buying Power: \$455 Million

2018 Convenience Area

Concentrated Buying Power:

\$107 Million per Square Mile

Total Buying Power: \$681 Million

Strategic Opportunities: January 2012

Convenience market

- Retail categories where the unmet demand may warrant evaluating and supporting business expansion include restaurants and entertainment and clothing along the convenience end of the corridor.
- Approximately \$35 million is leaving the trade area to make food and beverage purchases, that could potentially be captured by local stores.

Destination market

- Hatcher Road has at least two business clusters, auto care and building supplies for home improvement. These businesses should be profiled as clusters and marketed regionally.
- Nearly \$37 million is leaving the trade area to make general merchandise purchases that could potentially be captured by local stores.

Business to Business market

- Sunnyslope has a considerable market of businesses that serve other businesses, such as supplying construction materials or providing services to health care providers. Supporting and marketing this sector could provide the potential for substantial business growth.

Progress Report: April 2018

- Turnover at Desert Mission resulted in little corridor revitalization activity for several years.
- In recent years, new residential development north of Mountain View have brought higher income residents with more Buying Power.
- John C. Lincoln Hospital, now HonorHealth John C. Lincoln Medical Center remains committed to community improvement activities.
- Desert Mission Neighborhood Renewal, with the support of LISC Phoenix, has started a Financial Opportunity Center to assist area residents with employment services, financial counseling, and income supports.
- Growth in the neighborhood economy, new leadership at the Medical Center, and energized staff at Desert Mission are causing renewed interest in the commercial corridors of Sunnyslope.

Key Findings

Corridor Management

- The struggling economy of 2008 – 2012 inhibited both investment and engagement of stakeholders in corridor improvements.
- Commercial corridor development is often a slow, laborious process that depends upon sustained leadership to be successful. Staff turnover and changing priorities at Desert Mission and John C. Lincoln Hospital made sustaining the Hatcher Road effort especially challenging and slowed progress. The Hospital's presence creates opportunities that otherwise would not exist.
- The engagement of HonorHealth, Councilwoman Stark, and the energized Hatcher Road Revitalization Committee offer renewed interest in corridor development, although potential is limited by a relatively small market and proximity to Dunlap retail area.
- Establishment of the new Desert Mission Financial Opportunity Center presents the chance to integrate programs and enhance corridor development strategies with employment services, training, and support for local entrepreneurs across the broad community area.

The Market

- Changes in the market suggest that greater opportunities exist now than in 2012, including:
 - The total population in the Sunnyslope Convenience Area increased by 6% from 2010 to 2018.
 - Population has increased by more than 10% in key age groups from 25 to 54 that typically spend more for consumer goods than other age groups.
 - Concentrated Buying Power in the Convenience Area has increased from \$83 million to \$107 million per square mile, an increase of more than 20%.
- New residential developments north of Mountain View have attracted higher income residents with more Buying Power and more visible investment to the area.
- While Hatcher Road was seen by residents as the priority area for focus, the market opportunities were and are greater on Dunlap Street, which has a greater core of existing business and therefore, greater potential for growth.

Development and Change

- HonorHealth and Desert Mission are institutional anchors on the corridor.
- Preach Building Materials is a large business anchor.
- Improvement has been slow on Hatcher Road.
- The homeless population has been and continues to be a challenge to investment.
- Dunlap Road is beginning to show signs of investment and improvement.
- City land in Sunnyslope is available for development.
- Commercial property NW of 3rd and Hatcher has been renovated.
- Several vacant lots on the corridor are potential sites for future residential development.
- Economic vitality of the area appears improved, although quality retail remains scarce.
- The abandon Shell lot is being developed.
- Current focus of Hatcher Road Revitalization Committee is on marketing, promotion, and public safety.

Appendix

Primary Data Sources¹

Corridor	Initial Engagement: Population & Retail Float	Date of Data	Assessment Sources	Date of Data
Sunnyslope, Phoenix	Nielsen Claritas	2010	Environics Analytics (successor to Nielsen)	2018
	LISC MetroEdge metrics			
Main Street, Mesa	Nielsen Claritas	2010	Environics Analytics	2018
	LISC MetroEdge metrics	2015		
Apache Blvd, Tempe	Nielsen Corporation	2014	Environics Analytics	2018
	ESRI Community Analyst	2014		
McDowell Rd, Phoenix	ESRI	2016	Environics Analytics	2018
	Nielsen Corporation	2016		
Camelback Rd, Phoenix	ESRI	2016	Environics Analytics	2018
	Nielsen Corporation			

¹ Additional sources were used in the initial engagement for each corridor, including from each city, Valley Metro, and Departments of Transportation, as noted in each report. These may be accessed through the LISC Phoenix Economic Development Electronic Inventory.

Definitions

Buying Power: estimates and projections that reflect the income earned after taxes as a measure of disposable income available to be spent on goods and services.

Convenience Retail Area: Stores that serve traditional “Saturday morning” shopping needs such as pharmacies, groceries, dry cleaners or hardware stores. Customers typically prefer to find these goods and services within a 10-minute walking or driving distance of their home.

Demand: Estimates of the amount of money people in a trade area spend annually for specific retail goods and services, whether spent within or outside the trade area.

Retail Float: also known as retail “leakage”, a measure of the amount of retail opportunity in a trade area, it is calculated as the difference between buying power (demand) and retail sales (supply).

- When Retail Float is a positive value there is unmet demand by residents in the trade area, representing opportunities for new or existing businesses to target.
- When Retail Float is a negative value there is either a healthy concentration of destination oriented retail to build from, or there is a saturation of retail that indicates limited opportunity for business growth or expansion.
 - Retail such as restaurants, clothing or furniture stores attract shoppers looking for multiple stores. In most cases negative float for these categories indicates a business opportunity to start or grow a business to complement what already exists in the market.
 - Retail such as hardware stores, general merchandise stores and grocery stores are less likely to grow or expand when there is negative float (when there is little or no unmet demand in the surrounding market).

Supply: The amount of estimated sales by retail stores in a defined trade area.

Electronic Inventory

Market analyses and documentation from the five commercial corridors supported by LISC Phoenix are available in its Economic Development Electronic Inventory. Materials include:

- Original market analyses for the following commercial corridors:
 - Sunnyslope Phoenix
 - Main Street Mesa
 - Apache Blvd Tempe
 - McDowell Road Phoenix
 - Camelback Road Phoenix
- News articles about the corridors, including:
 - “Riding the Rails: Laying the Groundwork for Phoenix Development”
 - “On Mesa’s Main Street, A New Day Dawns”
 - “Retail Development on Camelback”

Access to these and other materials may be obtained by contacting the LISC Phoenix office.



