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# Upham's Corner Commercial District Profile and Business Mix Analysis

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## Summary of Findings: Business Profile and Mix Analysis

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### A. Overall Business District Profile

In total, Upham's Corner encompasses close to 550,000 square feet of commercial and institutional space "under roof". This includes 131 establishments in total. To put this in perspective, this is about two-thirds of the size of the Cambridgeside Galleria (which is 900,000 square feet with 120 businesses).

Approximately 41% of the space is devoted to retail and services traditionally found in commercial districts or shopping centers (including personal services, food service and professional services). A large portion (24%) is comprised of community/institutional uses with many public services (e.g., two schools, fire department, library) and several community nonprofits. The balance is other types of service businesses. There are approximately 18 vacant commercial spaces representing about 23% of the total.

### B. Business Mix Compared to Other Commercial Centers

One way to analyze a business district is to compare the business mix to similar-size successful shopping centers. The District contains a much higher percentage of service businesses than typical community centers and a much smaller percentage of retailers. The Business District has a smaller portion of both convenience goods and shoppers goods.

According to this comparative analysis, the Business District has a smaller proportion of the following:

- general merchandise stores
- food stores
- clothing/accessories
- hobby/special interest/sporting goods

The District contains many of the tenant types most frequently found in Community Centers. It is missing two of the most common, a discount department store, (although there is a Family Dollar which serves a similar niche on a smaller scale) and a supermarket (although, there are small food stores). A large discount department store or supermarket might not be likely tenants for the District due to lack of adequate available site size to accommodate footprint and parking requirements. Other under-represented or missing tenants types that could be explored further as potential business recruitment targets include:

- video rental (although this industry is on the decline)
- women's specialty
- eyeglass store
- sandwich shop

For analysis purposes, it is also useful to compare the business district being studied with other similar business districts. Three other neighborhood business districts in Boston were compared to the District – Egelston Square, Hyde/Jackson and Jamaica Plain Centre. Compared to these districts, the categories that appear under-represented in Upham's Corner include:

- food stores
- café/coffee shop
- hardware

### **C. Business Clusters and Complimentary Opportunities**

The presence of significant linkages between businesses is an important aspect of a good business mix. This should be considered when exploring opportunities for new businesses in the District.

The District appears to have several business clusters including:

- Casual Takeout Cluster
- Sit-Down Dining Cluster
- Personal Care/Salon Cluster
- Special Occasion/Wedding Cluster
- Children/Family Clothing & Accessories Cluster
- Urban/Hip Hop Men's Clothing Cluster
- Convenience/Errand Cluster
- Furniture Cluster
- Cape Verdean Cluster
- Health Care Cluster
- Entertainment Cluster
- Arts Cluster

The following business types and concepts might complement existing clusters. This is not intended to be a comprehensive list but begins to highlight potential opportunities:

- Coffee shop, dessert, ice cream, deli, sandwich/salad shop (e.g., Panera Bread)
- Additional full service restaurants, (e.g., Not Your Average Joe's)
- Florist, gift store, formal wear
- Children's Goods new and used (e.g., Children's Orchard, Children's Place, Second Time Around, Garment District, Play It Again, Game Stop)
- Independent urban clothing stores (possibly identified from other neighborhood commercial districts), other urban oriented clothing (e.g., Price 1, Rainbow Shops, Hip Zeppy)
- Wine and Cheese Shop, Prepared Foods, Specialty Food Store (e.g., Formaggio)
- Arts retail space, gallery, art supply, office space for creative businesses (architect, graphic design, computer software developers)

## Part One: Background and Overview of the Process and Purpose of this Report

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### I. Economic Restructuring Committee Background

A new UCMS Economic Restructuring Committee was formed in the Summer of 2006. The role of the ER Committee is generally to:

- Assess the Business District's composition and operation
- Analyze the market & identify opportunities
- Help existing businesses be successful & grow
- Recruit new businesses that would be appropriate and beneficial to the District
- Guide real estate development in a way that is compatible with the goals for the District

Peg Barringer, of FinePoint Associates, began providing technical assistance to the ER Committee in June 2006. This technical assistance was made possible by funding provided by Boston Main Streets. This working group began meeting monthly in June 2006 to discuss issues, collect data and analyze information. Zach Cohen was hired as UCMS Manager in January 2007 and began directing the organization and staffing the ER Committee. Initial committee activities centered around obtaining an understanding of the potential market. The ER Committee provided information about customer patterns and competing commercial centers that helped to identify the potential market area for the business district. FinePoint provided an analysis of the market area including demographics, market segments, market demand and sales leakage. This information serves as a basis for understanding of the retail opportunities available to existing merchants who may want to expand or new merchants coming into the district. After the initial market assessment, the group worked collaboratively to develop a business recruitment brochure that included a summary of demographics, market opportunities, market segments and area attractions and reasons to locate a business in the district.

#### Summary of Major ER Committee Activities July 2006 – June 2007

Demographic Analysis

Sales Leakage Analysis

Business Recruitment Brochure

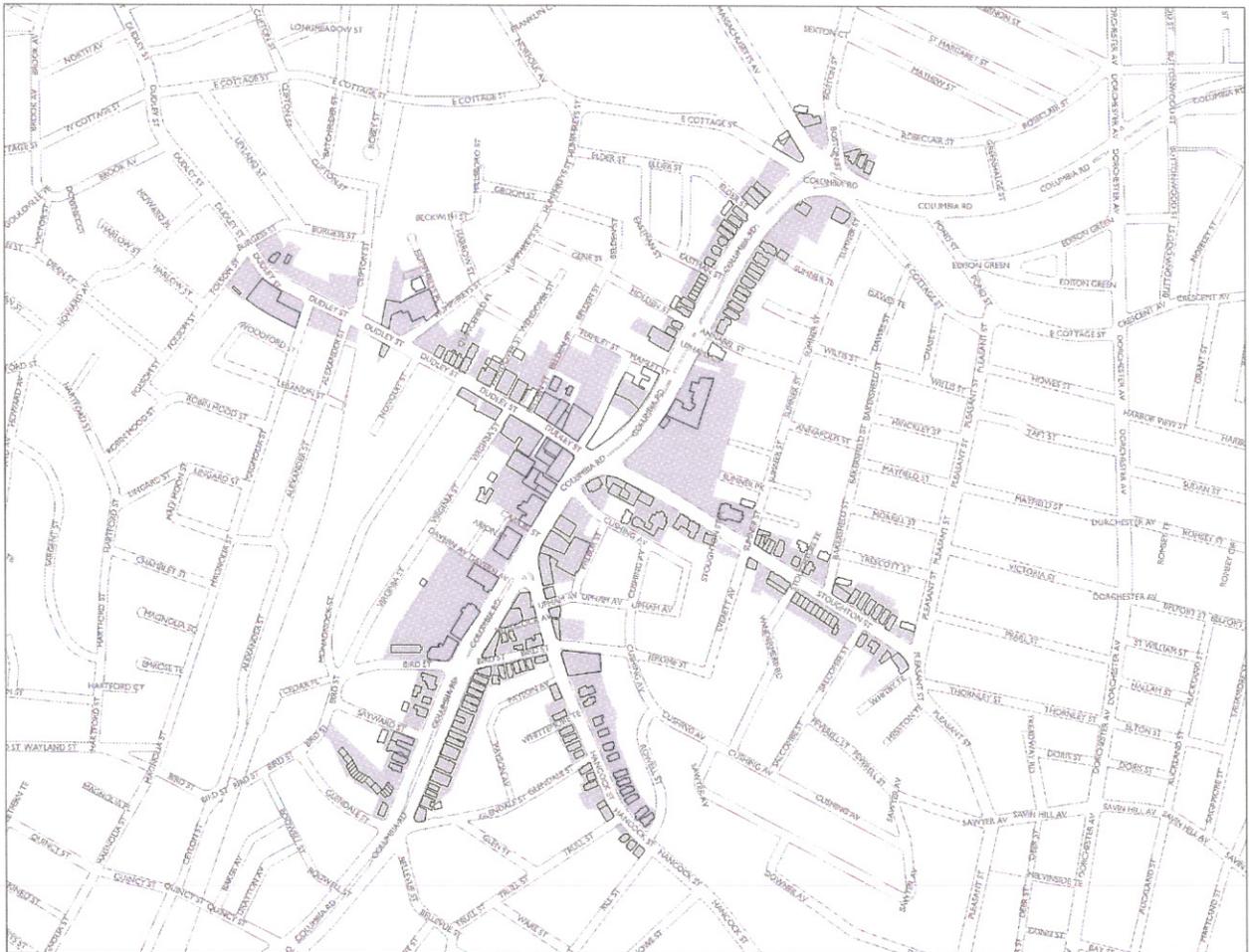
Business Networking Breakfasts

Working with Property Owners that have Vacancies and Contacting Potential Tenants

### II. Business Inventory Process and Analysis of Commercial Mix

During the Summer and Fall of 2007, the ER Committee completed an inventory of the buildings, commercial space and businesses in Upham's Corner. The ER Committee, along with other volunteers completed a thorough business inventory as well as collected other pertinent information. Using this data and working with the ER Committee, FinePoint was able to complete a business profile and an analysis of the commercial mix. FinePoint and the ER Committee worked together to analyze the information and determine the opportunities and implications for the Uphams Corner Business District. The purpose of this analysis is to determine what types of businesses are under-represented and how the business mix might be refined. The ER Committee plans to continue its efforts to strengthen the Business District; this report is seen as another important step in the process.

**Figure 1.**  
**Upham's Corner Business District Map**



## Part Two: Business District Profile and Analysis of Commercial Mix

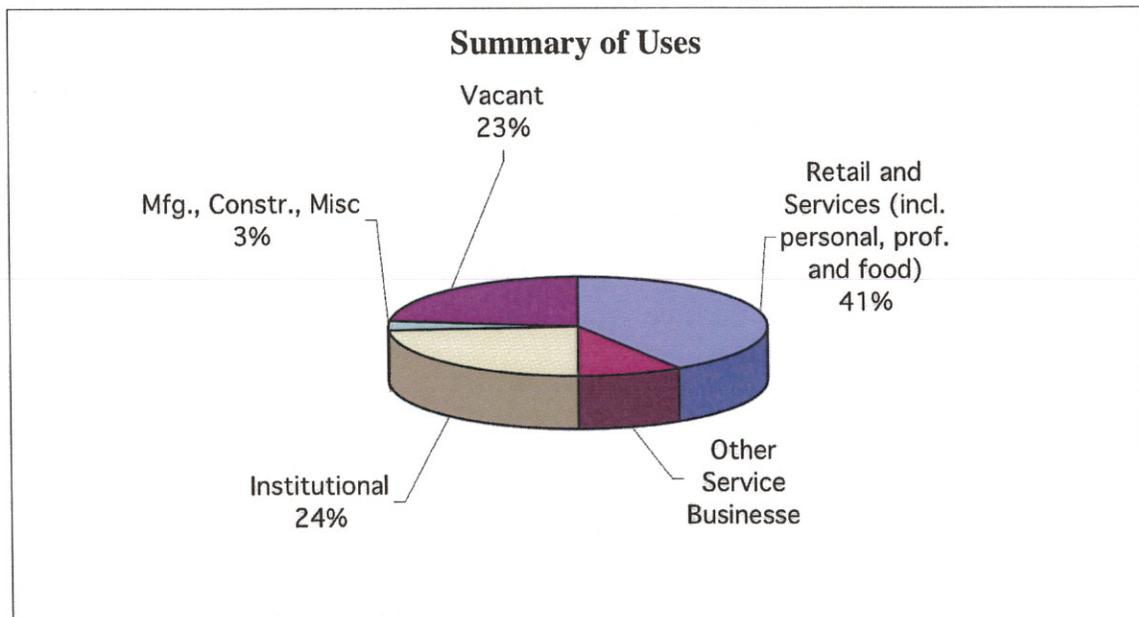
### I. Commercial District Profile

#### A. Overview

In total, Upham's Corner encompasses close to 550,000 square feet of commercial and institutional space "under roof". This includes 131 establishments in total. To put this in perspective, this is about two-thirds of the size of the Cambridge Galleria (which is 900,000 square feet with 120 businesses).

Approximately 41% of the space is devoted to retail and services traditionally found in commercial districts or shopping centers (including personal services, food service and professional services). A large portion (24%) is comprised of community/institutional uses with many public services (e.g., two schools, fire department, library) and several community nonprofits. The balance is other types of service businesses. There are approximately 18 vacant commercial spaces representing about 23% of the total.

Figure 2



#### B. Business Mix

The District contains 100 retail and service establishments. A few businesses are national chains and franchises (e.g., KFC, Store 24, Footlocker, Payless Shoes, CVS) but most are independent businesses. There are several business clusters in the District that will be identified later in this report.

The retail stores include: several clothing stores (men's clothing, casual women's, bridal, family wear), 4 shoe stores, many small food markets and convenience stores, 2 drugstores, a beauty supply, 3 dollar stores, 3 liquor stores, 3 furniture stores, a computer store, TV repair, music shop and Party supply store.

The District has a total of 17 restaurants/bars. There are 5 sit-down full service restaurants in the district. The other 12 restaurants offer casual fare and take-out food including pizza, Chinese, sandwiches and fast food.

There is a very strong representation of professional services in the District including 3 major banks, a major health center and other medical facilities, as well as several tax, legal and real estate businesses.

There is also a strong compliment of personal services -- in total, there are 12 hair, nail and skin salons. There are 5 laundry/cleaners, 2 day care centers, a funeral home and 2 furniture rental businesses.

In addition to retail and service establishments, the District has a strong presence of community institutions including the Post Office, a brand new very large community center, a Fire Station, several churches and numerous and social service establishments. The District is also home to 4 entertainment-related businesses. The Strand Theater, currently undergoing renovation, is a large performance venue. The other businesses include 2 theater groups and a billiards establishment.

## C. District Composition Analysis

Table 1.  
Upham's Corner Composition

All Businesses	# of Businesses	GLA
Retail and Services (incl. personal, prof. and food)	100	289,725
Other Service Businesses	4	63,035
Institutional	21	170,151
Manufacturing, Construction, Misc.	6	20,190
<b>Total all Businesses</b>	<b>131</b>	<b>543,101</b>

Retail, Personal and Professional Service	# of Businesses	GLA	Share of GLA
<b>Retail</b>	<b>44</b>	<b>111,623</b>	<b>39%</b>
<b>Convenience Goods</b>	<b>15</b>	<b>31,735</b>	<b>11%</b>
Food, Liquor	11	15,010	5%
Drugs, Health, Beauty	4	16,725	6%
Florist	0	-	0%
<b>Shoppers Goods</b>	<b>29</b>	<b>79,888</b>	<b>28%</b>
Apparel, Footwear, Jewelry	15	22,623	8%
Furniture, Home Furnishings	3	36,900	13%
Hobby/Special Interest	1	1,400	0%
Sporting Goods	0	-	0%
Gifts, Party Supply, Luggage, Trophies	1	1,875	1%
Hardware, Bldg. Materials, Paint	0	-	0%
Home Appliances/Computer/Music	3	2,950	1%
General Merchandise, Department Stores	3	12,925	4%
Other Retail (eyeglasses, fabric, office supply, pets, telecom.)	2	715	0%
Used Goods	1	500	0%
Auto Related Retail	0	-	0%
<b>Services (Food Service, Personal and Professional)</b>	<b>56</b>	<b>178,102</b>	<b>61%</b>
<b>Food Service and Personal Services</b>	<b>40</b>	<b>76,624</b>	<b>26%</b>
Restaurants and Bars	17	28,380	10%
Beauty, barber, nails, skin	12	11,081	4%
Laundry, dry cleaning	5	8,078	3%
Tailoring, shoe repair	0	-	0%
Printing, copying, packaging, delivery	0	-	0%
Video Rental	0	-	0%
Travel	0	-	0%
Other Personal Services	6	29,085	10%
<b>Professional Services</b>	<b>16</b>	<b>101,478</b>	<b>35%</b>
Health Care	5	53,335	18%
Finance, Insur, RE, Legal, Acctg	11	48,143	17%
Other Professional Services	0	-	0%
<b>Total Retail and Services (Food, Personal and Prof.)</b>	<b>100</b>	<b>289,725</b>	<b>100%</b>

<b>Other Service Businesses</b>	<b># of Businesses</b>	<b>GLA</b>
Entertainment, Fitness, Function Halls	4	63,035
Hotels/Lodging	0	-
Auto Related Service	0	-
<b>Total Other Service Businesses</b>	<b>4</b>	<b>63,035</b>

<b>Institutions</b>	<b># of Businesses</b>	<b>GLA</b>
Community/Government/Nonprofit	12	64,858
Religion	7	51,100
Schools/Education	2	54,193
Hospitals/Large Health Centers/Nursing Homes	0	-
<b>Total Institutional</b>	<b>21</b>	<b>170,151</b>

<b>Manufacturing, Construction, Misc.</b>	<b># of Businesses</b>	<b>GLA</b>
Manufacturing	2	15,000
Construction/Contractors	3	3,690
Miscellaneous	1	1,500
Communications	1	1,500
Recycling	0	-
Utilities/Heating Oil	0	-
Other	0	-
<b>Total Manufacturing, Construction, Misc.</b>	<b>6</b>	<b>20,190</b>

*\*Analysis is based on business data provided by the UCMS Economic Restructuring Committee*

**D. Business District Listing by Type**  
**Table 2.**

**General Merchandise**

Dollar Stop Plus  
 Family Dollar of Massachusetts  
 99 ¢ State

**Food**

Fiesta Bakery & Party Supplies  
 Navarrete Grocery  
 Store 24 (Tedeschi's)  
 Hermanos Unidos  
 El Frutero Market  
 Tropical Grocery Store  
 Hancock Mart  
 Alves Market

**Food Service/Bars**

Cataloni's Bar  
 New Garden  
 Singh's Roti Shop  
 Navarrete Restaurant  
 Yanet Restaurant  
 Caribe Restaurant  
 Canton House  
 Tropical Island Restaurant  
 Liriano Restaurant  
 Upham's House of Pizza  
 Dublin House (Yaz's Place)  
 Restaurant Laura's Place, Inc.  
 Seven 50 Grille  
 ka-Carlos  
 Chef Lee's II Soul Food  
 New York Fried Chicken  
 KFC

**Clothing and Accessories**

Barry's Clothing Store  
 Super Bargain Store  
 L & M Bargain  
 Nevarez Clothing Dealer  
 All Seasons Fashion and Hair Braiding  
 Mad Rag  
 Eurostyle  
 A & M Bargain Center  
 Only One Design Women's Boutique  
 All Seasons Bridal & Flower Shop

**Shoes**

Footlocker  
 Style Shoe Store  
 Payless Shoe Source  
 Discount Shoes

**Home Furnishings**

Furniture Mart  
 Jerusalem Furniture, Inc.  
 J. Bell & Sons Furniture Co., Inc

**Home Appliances/Computer/Music**

PC Solutions Computer Firm  
 Parker St. TV Repair and Sales  
 Island Music

**Hobby/Special Interest/Sporting Goods**

Libreria Cristiana Amor

**Gifts/Speciatly/Florist**

Mario's Party, Co.

**Jewelry**

Tran's Jewellery, Ltd.

**Liquour**

Cape Verdean Liquors  
 Lee Bros. Liquors  
 Hancock Liquor Mart

**Drugs, Health & Beauty**

Strand Pharmacy  
 CVS  
 Upham's Corner Beauty Supply  
 Avon

**Other Retail and Used Goods**

E & A Barely Used Boutique  
 Communications Center  
 Ultimate Communications

**Personal Care/Salon**

Jackson's Barber Salon  
 Las Americas Barber Shop  
 Spectrum Hair Performance  
 Alex's Unisex Beauty Center  
 Consuelo Beauty Salon  
 Nueva Imagen (Wilma Hairstyling)  
 Alexandra Beauty Salon  
 Pisces Hair Place  
 Isabel's Unisex Salon  
 Tete African Braiding  
 Fantasy Nail  
 T & T Nails

**Laundry.Cleaning.Tailor. Shoe Repair**

Araujo Coin Op Laundromat  
 Granite Laundry  
 Nancy Laundromat + Plumbing + Heating  
 Bakersfield Corner Lundromat  
 Spots Cleaners

**Other Personal Services**

Pilgrim Daycare Center  
 Ruth Darling Daycare Center  
 Floyd A Williams Funeral Home, Inc  
 Aaron's Furniture  
 Rent-A-Center  
 Amado Enterprises, Inc.

**Entertainment, Fitness, Functions**

Columbia Billiard Co., Inc.  
 Chamber Theater Group  
 Strand Theatre  
 Boston Muay Thai

**Finance, Insur, R.E., Legal, Acctg**

H&R Block  
 Boston Check Cashers  
 CCO Mortgage Corp  
 Citizens Bank  
 H & R Block  
 Bank of America  
 Sovereign Bank  
 Pacific Insurance Agency  
 Christopher Kokoras Insurance Agency  
 Ellison and Associates  
 Conqueror's Real Estate

**Health Care**

Upham's Corner Health Center  
 Upham's Corner Health Center - Dental  
 Columbia Chiropractico  
 Excel Physical Therapy, Inc.  
 Upham Chiropractic  
 Columbia Chiropractico  
 Excel Physical Therapy, Inc.

**Community Gov.,Nonprofits, Institutions**

United States Post Office  
 The Chahara Foundation  
 Greater Boston Interfaith Organization  
 Dorchester Bay Economic Dev. Corp.  
 Upham's Corner Main Street  
 Pilgrim Homeless Shelter  
 Project Care and Concern  
 Upham's Corner Branch Library  
 Bird Street Community Center  
 Upham's Corner Health Committee, Inc.  
 Fire Department Engine #21  
 MA Alliance of Portuguese Speakers  
 United Church of Christ Pilgrim Church  
 Igreja Universal do Reino de Deus  
 Iglesia El Buen Pastor  
 Order of Services  
 St Mary's Episcopal Church  
 Iglesia Penteconstal Jesus El Señor  
 Iglesia Adventista  
 The City School  
 St. Kevin's School

**Other Businesses**

Comcast  
 New Looks Painting and Contracting  
 Inner City Glass Co.  
 Atco Supply Co. Inc.  
 Glass Medic  
 Technical Construction Services

## E. Business Cluster and Linkages

The presence of significant linkages between businesses is an important aspect of a good business mix. This should be considered when exploring opportunities new businesses in the District. Identifying existing business linkages and clusters that already exist in a commercial district can reveal existing customer patterns as well as point to potential opportunities for new related businesses. In addition, when creating a plan to recruit new businesses, sometimes it is necessary to attempt to recruit several types of “linked” business at the same time (e.g. cluster of restaurants, several women’s apparel and accessory shops, several home furnishing stores, etc.)

Sometimes businesses are linked because they provide crossover-shopping opportunities for customers. In other words, a customer might be likely to patronize several of the businesses in a cluster in order to purchase related goods or services (e.g. shoes and clothing) or to complete several transactions during the same shopping trip (e.g. bank, post office, drugstore). Or, the businesses might be linked because they serve similar market segments, customers with common characteristics (i.e., interests, needs, tastes, lifestyles, buying behavior). Business can also be linked because they provide comparative shopping opportunities. In this case, a grouping of businesses can attract more customers than a single business because the consumer can explore a greater variety of options in the same shopping trip and because an area sometimes gets known for offering a certain type of good or service. The District appears to have several business clusters including:

- Casual Takeout Cluster
- Sit-Down Dining Cluster
- Personal Care/Salon Cluster
- Special Occasion/Wedding Cluster
- Children/Family Clothing & Accessories Cluster
- Urban/Hip Hop Men’s Clothing Cluster
- Convenience/Errand Cluster
- Furniture Cluster
- Cape Verdean Cluster
- Health Care Cluster
- Entertainment Cluster
- Arts Cluster

These clusters are detailed in the following table along with some complimentary business opportunities.

**Table 3.**

**Business Clusters**

<b>Existing Business Cluster</b>	<b>Complementary Business Opportunity</b>
<p><u>CASUAL TAKEOUT CLUSTER</u>                      New Garden, Singh's Roti Shop, Navarrete Restaurant, Yanet Restaurant, Caribe Restaurant, Canton House, Tropical Island Restaurant, Liriano Restaurant, Upham's House of Pizza, New York Fried Chicken, KFC</p>	<p>Coffee shop, dessert, ice cream, deli, sandwich/salad shop (e.g., Panera Bread)</p>
<p><u>SIT-DOWN DINING CLUSTER</u>                      Dublin House, Restaurant Laura's Place, Seven 50 Grille, ka-Carlos, Chef Lee's Il Soul Food</p>	<p>Additional full service restaurants, (e.g., Not Your Average Joe's), coffee shop, dessert, ice cream</p>
<p><u>PERSONAL CARE/SALON CLUSTER</u>                      Jackson's Barber Salon, Las Americas Barber Shop, Spectrum Hair Performance, Alex's Unisex Beauty Center, Consuelo Beauty Salon, Nueva Imagen, T &amp; T Nails, Alexandra Beauty Salon, Pisces Hair Place, Fantasy Nail, Tete African Braiding, Isabel's Unisex Salon</p>	
<p><u>SPECIAL OCCASION/WEDDING CLUSTER</u>                      Fiesta Bakery &amp; Party Supplies, Mario's Party, Co., All Seasons Bridal &amp; Flower Shop, Only One Design Women's Boutique</p>	<p>Florist, gift store, formal wear</p>
<p><u>CHILDREN/FAMILY CLOTHING &amp; ACCESSORIES CLUSTER</u>                      L&amp;M Bargain, Payless Shoe Source, Footlocker</p>	<p>Children/Youth Goods - new and used (e.g., Children's Orchard, Children's Place, Second Time Around, Garment District, Play It Again, Game Stop)</p>
<p><u>URBAN/HIP HOP MEN'S CLOTHING CLUSTER</u>                      A&amp;M Bargain Center, Barry's Clothing Store, Super Bargain Store, Nevarez Clothing Dealer, All Seasons Fashion and Hair Braiding, Footlocker, Discount Shoe Store, Tran's Jewelry, Mad Ra</p>	<p>Independent urban clothing stores (possibly identified from other neighborhood commercial districts), other urban oriented clothing (e.g., Price 1, Rainbow Shops, Hip Zeppy)</p>
<p><u>CONVENIENCE/ERRAND CLUSTER</u>                      Navarrete Grocery, Store 24, Cape Verdean Liquors, Lee Bros. Liquors, Hancock Liquor Mart, Post Office</p>	<p>Wine and Cheese Shop, Prepared Foods, Specialty Food Store (e.g., Formaggio)</p>
<p><u>FURNITURE CLUSTER</u>                      Furniture Mart, Jerusalem Furniture, Inc., Rent-A-Center, Aaron's Furniture, Bell Furniture, modhaus.com</p>	
<p><u>CAPE VERDEAN CLUSTER</u>                      Restaurant Laura's Place, ka-Carlos, Eurostyle, Island Music, Amado Enterprises, Cape Verdean Liquors, Araujo Coin Op Laundromat, Isabel's Unisex Salon, Las Americas Barber Shop, Alex's Unisex Beauty Center</p>	
<p><u>HEALTH CARE CLUSTER</u>                      Upham's Corner Health Center, UCHC Dental, Columbia Chiropractico, Excel Physical Therapy, Upham Chiropractic</p>	
<p><u>ENTERTAINMENT CLUSTER</u>                      Strand Theatre, Columbia Billiard Co., Inc., Dublin House, Restaurant Laura's Place, ka-Carlos</p>	
<p><u>ARTS CLUSTER</u>                      Several artists in and round the district                      Strand Theater                      Chamber Theater Group</p>	<p>Arts retail space, gallery, art supply, office space for creative businesses (architect, graphic design, computer software developers)</p>

## II. Analysis of Business Mix Compared to Other Commercial Centers

### A. Shopping Center Typology and Comparison

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

<b>Type of Shopping Centers<sup>1</sup></b>		
<b>Type of Center</b>	<b>Approximate Size (sq. ft. floor area)</b>	<b>Tenant Types</b>
Convenience	< 30,000	Personal services (beauty shop, laundry, etc.) and convenience goods (food, drugs, sundries), possibly anchored by mini market
Neighborhood	30,000 – 100,000	Personal services and convenience goods for day to day living needs
Community	100,000 – 500,000 or more	In addition to personal and convenience goods, wider range of soft lines (apparel) and hard lines (appliance, hardware). Often has discount store, junior department store, variety store or super drug store as major tenant in addition to supermarket. Although, no full-line department store, may have strong specialty stores.
		<u>Super Community Center</u> - community center that contains over 250,000 sq. ft.
		<u>Power Center</u> - Community Center that contains at least four category-specific, off-price anchors of 20,000 sq. ft. or more; typically electronics, sporting goods, home improvement, furnishings, drugs, HBA, toys, computers, narrow focus, deeply merchandised, “category killers” along with more broadly merchandised stores
Regional	Typically around 500,000 (250,000 – 900,000)	General merchandise, apparel, furnishings. In-depth variety of retail as well as services and recreation facilities, may have one or two full line department stores
Super Regional	Typically around 1,000,000 (500,000 – 1,500,000)	Extensive variety of general merchandise, apparel, furnishings as well as services and recreation facilities. Three or more full line department stores.

In size, the type of center that Upham’s Corner most closely resembles is a Community Shopping Center. The retail and service portion of the District, (approximately 290,000 sq. ft.) fits within the typical range for a community center. The following section of this report compares the tenant mix of the District to a typical community shopping center.

<sup>1</sup> Dollars and Cents of Shopping Centers: 2004, Urban Land Institute, Washington, DC 2004

## B. Mix of Convenience Goods, Comparison Goods and Services

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

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

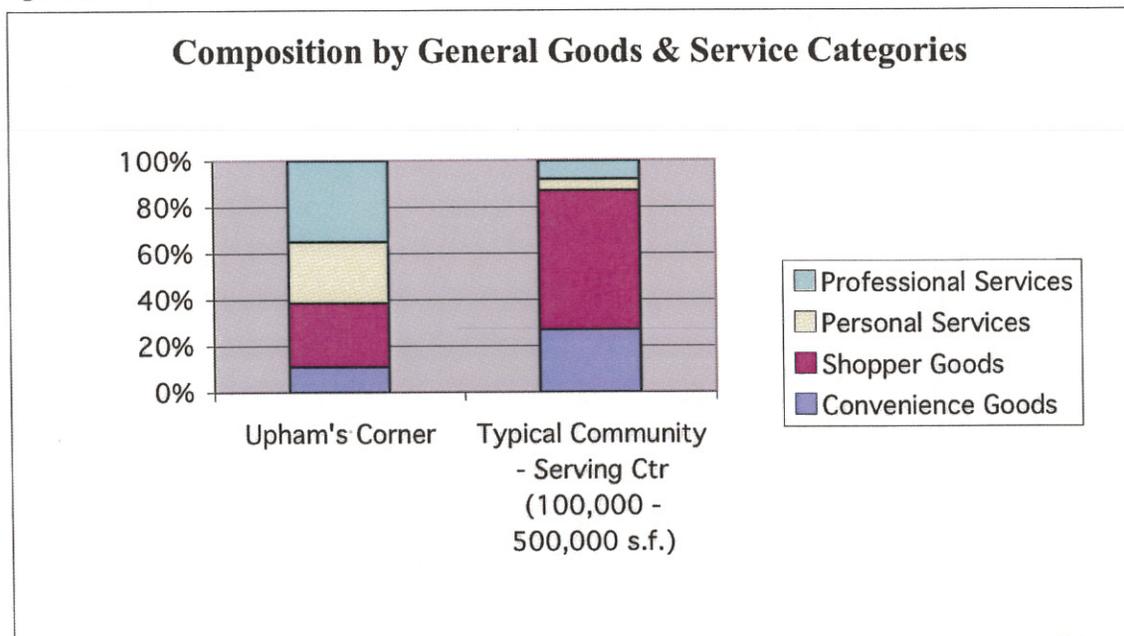
**Shoppers Goods:** Goods which consumers spend the most effort to acquire and have the greatest desire for comparison shopping. The trade area is often governed by desire to comparison shop and therefore trade area size is affected by availability of such goods. (e.g. clothing, furniture, etc.)

**Personal Services:** Services required on a frequent basis and acquired where it is most convenient (e.g. dry cleaners, beauty/barber/nail salon, etc.) People purchase near home, work or temporary residence when traveling.

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

As the following chart indicates, Upham's Corner contains a much higher percentage of service businesses than typical community centers. Conversely, it has a much smaller percentage of retailers. This would be expected to some degree, as business districts and downtowns often contain more services than other commercial shopping centers. However, it is useful to note how small a percentage of retail there is compared to services. About 40% is retail compared to 80-90% in typical community shopping centers. The District has a much smaller proportion of both convenience goods and shoppers goods.

Figure 3

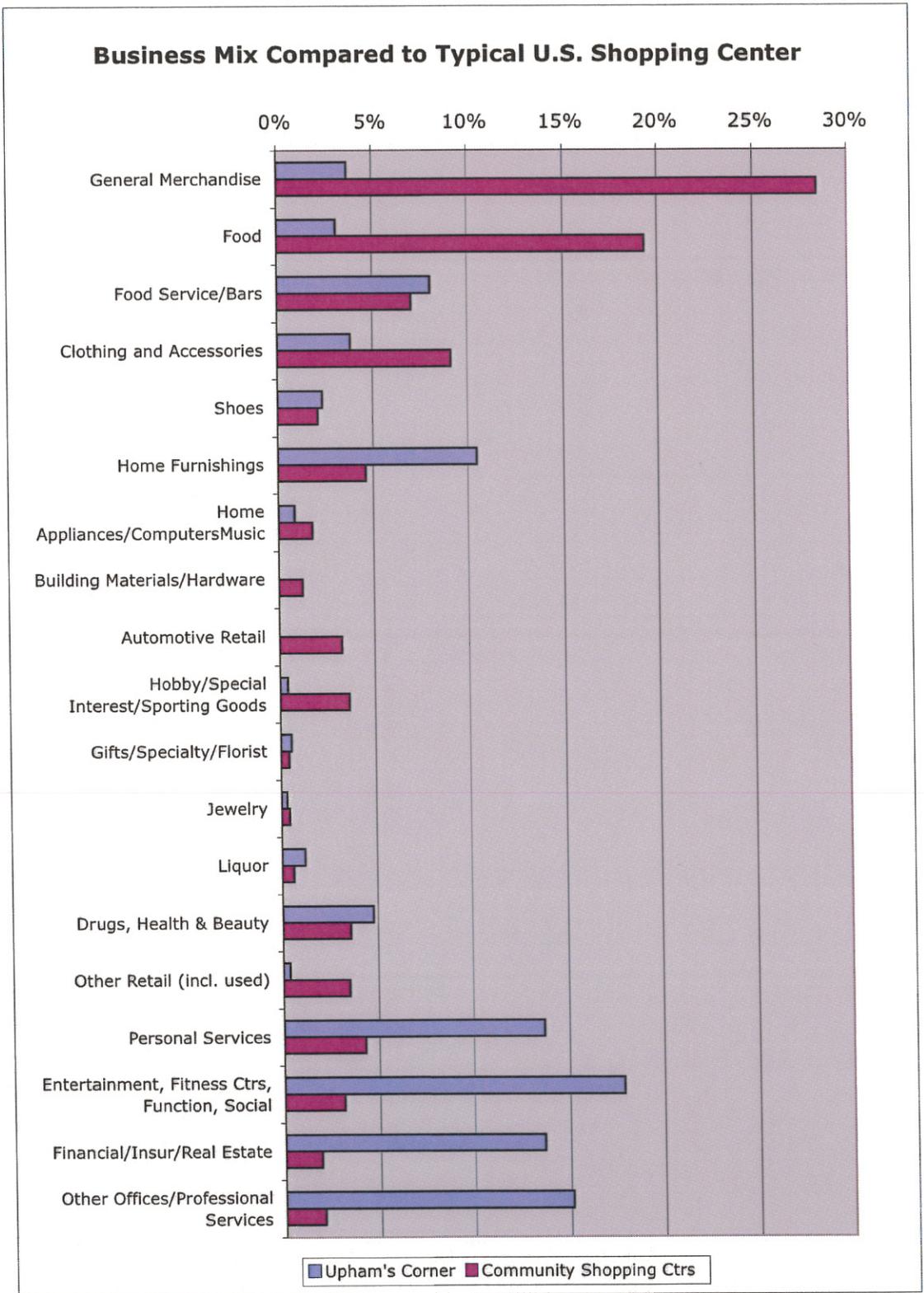


The District is composed of only 28% shoppers goods compared with typical community centers (60%). Establishments that sell shoppers goods are particularly important as they tend to draw customers into the area from greater distances and expand the trade area for other businesses in the district. Customers often go to an area to purchase shoppers goods and while they are there also buy convenience goods and services. The depth of shoppers goods is tied to the center's ability to maintain its customer base and generate crossover shopping patronage for other businesses. Therefore, encouraging the recruitment/expansion of shoppers goods businesses as one strategy that should be considered.

### **C. Tenant Category Comparison**

The following chart shows the current mix of businesses in the District compared to a typical community shopping center. The biggest difference in the District is the lack of general merchandise stores, food stores, clothing/accessories and hobby/special interest/sporting goods.

Figure 4.



#### D. Comparison of Most Frequently Found Tenants

The chart below contains a list of the most frequently found tenants in U.S. Community Shopping Centers. The District contains most of these frequently found tenant types. It is missing two of the most common, a discount department store, (although there is a Family Dollar which serves a similar niche on a smaller scale) and a supermarket (although, there are small food stores). A large discount department store or supermarket might not be likely tenants for the District due to lack of adequate available site size to accommodate footprint and parking requirements. Other missing tenants types include: women's specialty, eyeglass store, video rental (although this industry is on the decline) and a sandwich shop (depending on how you categorize the existing casual restaurants). These categories could be explored further as potential business recruitment targets.

Table 4.

Most Frequently Found Tenants in U.S. Community Shopping Centers 2004	
Rank	Business Type
1	Restaurant with liquor
2	Women's ready-to-wear
3	Discount department store
4	Supermarket
5	Medical and dental
6	Unisex hair salon
7	Family shoes
8	Cards and gifts
9	Dry Cleaner
10	Bank
11	Drugstore/pharmacy
12	Jewelry
13	Women's hair salon
14	Sandwich shop
15	Furniture
16	Nail salon
17	Pizza
18	Women's specialty
19	Cosmetics/beauty supplies
20	Eyeglasses/optician

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

#### E. Comparison to Other Business Districts

For analysis purposes, it is also useful to compare the business district being studied with other similar business districts. In the following chart, mix of businesses in Upham's Corner is compared with Egleston Square, Hyde/Jackson Square and Jamaica Plain Centre/South.

Compared to these other business districts, the categories that appear to be under-represented in Upham's Corner include: food stores, café/coffee shop, and hardware.

**Table 5.**  
**Comparison with Other Commercial Districts**

Business Type	Egleston Square	Jamaica Plain Centre/ South	Hyde/ Jackson	Upham's Corner
	#	#	#	#
General Merchandise	1	1	1	3
Food	11	6	12	8
Food Service/Bars	10	25	21	17
Café/Coffee Shops	1	3	1	0
Ice Cream/Yogurt	0	1	0	0
Other Restaurants	8	18	18	16
New Clothing and Accessories	3	6	6	10
Shoes	1	2	2	4
Home Furnishings Retail	1	3	1	3
Home Appliances/Computer/Music	2	2	4	3
Home Appliances	1	1	1	1
Computers/Software	0	0	1	1
Music	1	3	3	1
Building Materials/Hardware	1	3	0	0
Automotive Retail	2	0	2	0
Hobby/Special Interest/Sporting Gds	1	8	0	1
Art	0	1	0	0
Books/Comics	0	3	0	1
Collectibles	0	0	0	0
Photography/Film	1	1	0	0
Toys	0	0	0	0
Sporting Goods	0	2	0	0
Gifts/Specialty/Florist	0	7	1	1
Gifts	0	5	0	0
Party Goods	0	0	1	1
Luggage	0	0	0	0
Trophies	0	0	0	0
Florists	0	2	0	0
Jewelry	2	1	1	1
Liquor	2	1	2	3
Drugs, Health & Beauty	3	2	1	4
Other Retail and Used Goods	4	6	4	3
Fabric/Sewing	0	0	0	0
Office Supplies	0	0	0	0
Pet Sales/Supply	0	0	0	0
Beepers/Cellular	2	1	3	2
Eyeglasses-Optician	0	1	0	0
Other-Retail	2	2	1	0
Used Goods	0	2	0	1
Personal Services	26	27	22	23
Entertainment, Fitness, Function Halls	0	5	0	4
Financial/Insur/Real Estate	13	39	13	11
Other Offices/Health Care/Prof. Serv.	4	28	6	5
Health Care	4	23	6	5
Other Professional Services	0	5	0	0
<b>Total</b>	<b>87</b>	<b>174</b>	<b>99</b>	<b>104</b>

## Appendix A Demographic Summary

Demographics	.5 mile Radius	1 mile Radius	1.5 mile Radius
<b>Population</b>			
Population (2000)	17,930	54,490	106,823
Population (2005 est.)	17,548	54,230	106,095
Population (2008 proj)	17,326	53,837	105,282
<b>Households</b>			
Households (2000)	5,733	18,584	37,820
Households (2005 est.)	5,672	18,666	37,969
Households (2008 proj)	5,621	18,588	37,811
<b>Income</b>			
Median HH Income (2000)	\$33,664	\$31,357	\$30,566
Median HH Income (2005 est.)	\$40,600	\$37,765	\$37,024
Median HH Income (2008 proj)	\$49,329	\$45,852	\$45,132
Average HH Income (2000)	\$44,500	\$40,893	\$40,761
Average HH Income (2005 est.)	\$54,601	\$51,156	\$51,682
Average HH Income (2008 proj)	\$68,411	\$63,958	\$65,044
Per Capita Income (2000)	\$14,906	\$14,388	\$15,062
Per Capita Income (2005 est.)	\$18,085	\$17,726	\$18,989
Per Capita Income (2008 proj)	\$22,689	\$22,195	\$23,933
<b>Characteristics</b>			
Median Age (2005)	30.3	30.2	30.6
Avg. persons per Household (2005)	3	2.85	2.71
Households with Children (2000)	45.8%	43.7%	40.8%
Married Couple Households (2000)	32.0%	28.4%	25.6%
Other Family (no spouse) 92000	36.4%	37.1%	36.3%
Single Person Households (2000)	23.0%	26.6%	29.4%
Roommate Households (2000)	8.7%	7.9%	8.7%
Households with no vehicle (2000)	35.2%	39.2%	38.8%
<b>Educational Attainment (25+) (2000)</b>			
High School Graduate	30.5%	31.4%	30.6%
Some College, No Degree	17.3%	16.4%	16.2%
Associate Degree	3.9%	4.3%	5.0%
Bachelor's Degree	9.1%	9.6%	11.0%
Master's/Prof/Doctorate Degree	5.3%	4.9%	6.0%
<b>Race (2005)</b>			
White Alone	22.2%	22.4%	22.9%
Black/African American Alone	37.4%	42.9%	47.8%
Native American Alone	0.5%	0.5%	0.6%
Asian Alone	9.0%	9.5%	8.4%
Some Other Race Alone	20.7%	17.0%	13.8%
Two or More Races	10.2%	7.7%	6.5%
Hispanic	21.4%	19.4%	18.8%
<b>Housing Tenure (2005)</b>			
Owner	31.4%	28.6%	26.1%
Renter	63.7%	65.6%	67.5%

<sup>1</sup> Data Sources: U.S.Census 2000, ESRI BIS estimates and projections 2003 and 2008

**Trade Area - Most Prevalent Tapestry Market Segments <sup>1</sup>**

	<b>.5 Mile Radius</b>
<b>Top Segments</b>	
International Marketplace	45.2%
City Strivers	43.5%
Urban Melting Pot	10.3%
City Lights	1.0%
	<b>1 Mile Radius</b>
<b>Top Segments</b>	
City Strivers	46.6%
International Marketplace	30.2%
Urban Melting Pot	10.7%
High Rise Renters	6.3%
City Lights	2.9%
	<b>1.5 Mile Radius</b>
<b>Top Segments</b>	
City Strivers	47.0%
International Marketplace	17.1%
High Rise Renters	7.8%
Metro Renters	6.8%
City Lights	6.4%

**Trade Area - Most Prevalent Tapestry Market Segments <sup>1</sup>**

**International Marketplace**

Located primarily in cities in coastal gateway states, International Marketplace neighborhoods are developing, urban markets with a rich blend of cultures and household types. Approximately 70 percent of households are occupied by families. Married couples with children and single parents with children represent 44 percent of households. A typical family rents an apartment in an older, multiunit structure. Most of the households are located in California and northeastern states. The median age is 30.4 years, and the median household income is \$42,600. Top purchases include groceries and children's clothing. Residents shop at stores such as Marshalls and Costco, but for convenience, they stop at 7-Eleven or other similar convenience stores. They are loyal listeners of Hispanic radio programs and prefer to watch movies and sports on TV.

**City Strivers**

City Strivers residents are urban denizens of densely settled neighborhoods in major metropolitan areas such as New York City and Chicago, Illinois. Most households are composed of a mix of family types. The median age is 32.1 years, and the median household income is \$36,800. Employment is concentrated in the city, with half of employed residents working in the service industry, particularly in health care. Twenty-two percent are government workers. Unemployment is twice that of the U.S. level. Housing is mostly older, rented apartments in smaller, multiunit buildings. Primary spending is for groceries, baby products, and children's essentials. Residents enjoy going to dance performances, football and basketball games, and Six Flags theme parks. They listen to urban, all-news, and jazz radio formats and watch TV, especially movies, sitcoms, news programs, courtroom TV and talk shows, tennis, and wrestling.

### **Urban Melting Pot**

The ethnically rich Urban Melting Pot neighborhoods are made up of recently settled immigrants; more than half of whom were born abroad. Half of the foreign-born residents immigrated to the United States in the last 10 years. Most rent apartments in high-density, urban canyons of large cities, primarily in New York and California. Approximately half of the housing units were built before 1950. The median age is 35.7 years, and the median household income is \$37,400. These fashion- and cost conscious residents love to shop, from upscale retailers to warehouse/club stores. Leisure activities include going to the beach, visiting theme parks and museums, playing football, ice skating, and roller blading. Distance does not deter these residents from contacting family living outside the United States. They keep in touch with phone calls and overseas travel.

### **City Lights**

City Lights neighborhoods are diverse, situated primarily in the Northeast. This dense, urban market is a mixture of housing, household types, and cultures, sharing the same city sidewalks. Housing types include single-family homes, townhomes, and apartments. Thirty-five percent of households are apartments in buildings with two to four units, almost four times the national level. Approximately two-thirds of the housing units were built before 1960. Households include both families and singles. The median age of 37.8 years is slightly older than the U.S. median. City Lights residents are more likely to spend for household furnishings than home maintenance. They shop at a variety of stores, especially Macy's, Lord & Taylor, The Disney Store, The Gap, and BJ's Wholesale Club. They favor overseas travel. Being conservative investors, they own U.S. savings bonds.

### **High Rise Renters**

This segment has the highest percentage of renters among all the Community Tapestry segments; more than nine in ten households are renters in these densely populated neighborhoods. Approximately 41 percent rent in buildings with 50 or more units. High Rise Renters communities are located almost entirely in the Northeast; 86 percent of the households are in New York. Residents represent a diverse mix of cultures; many speak a language other than English. The median age is 29.6 years. Household types are mainly single parent and single person. Part-time work is just as common as full time. Residents do aerobics and play soccer. They enjoy dancing; attending basketball and football games; watching movies on VHS and DVD; and listening to all-news, urban, and Hispanic radio. They watch a variety of news programs and are avid viewers of daytime TV.

### **Metro Renters**

Metro Renters residents are young (approximately 30 percent are in their 20s), well-educated singles beginning their professional careers in some of the largest U.S. cities such as New York City, Chicago, and Los Angeles. The median age is 33.6 years; the median household income is \$52,300. As the name Metro Renters implies, most residents are renting apartments in high-rise buildings, living alone or with a roommate. Their interests include traveling, reading two or more daily newspapers, listening to classical music and public radio programs, and surfing the Internet. For exercise, they work out regularly at clubs, play tennis and volleyball, practice yoga, ski, and jog. They enjoy dancing, attending rock concerts, going to museums or the movies, and throwing a Frisbee. Painting and drawing are favorite hobbies. Politically, this market is liberal.

<sup>1</sup> This data was purchased from ESRI Business Information Solutions which updates Tapestry™ data annually using a variety of national and local sources.

## Appendix B Sales Leakage Analysis Summary

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

The following analysis compares the amount that residents spend annually at various types of retail stores with the total sales of the businesses within the same area. The difference between what the residents spend and what the local businesses are capturing is called “leakage”. The leakage amount is presented in two ways. The dollar figure represents the volume of lost sales and the square foot number represents the estimated amount of commercial space that could be supported by those lost sales. Although large leakage amounts indicate potential opportunities, it should be noted that 100% capture is not expected in small trade areas. Given the mobility of the population and the variety of shopping options, consumers are likely to continue to purchase a portion of their goods and services outside the trade area (e.g., during shopping trips to regional malls, at businesses near where they work, or while traveling for pleasure and business).

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

### Important Notes:

In addition to the businesses located in the commercial district, there are numerous businesses located elsewhere within the identified trade area. The trade area sales illustrated in the following table include all of the businesses in the trade area, not just those located within the commercial district.

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

This analysis employs estimates based on the most current information available. Businesses could have been added or may have left the area since these figures were compiled.

Leakage Analysis	.5 Mile Radius		1 Mile Radius		1.5 Mile Radius	
	Unmet Demand/ Leakage		Unmet Demand/ Leakage		Unmet Demand/ Leakage	
Business Type	\$ Amount	Square Feet	\$ Amount	Square Feet	\$ Amount	Square Feet
Furniture Stores	(1,041,370)	(4,628)	308,779	1,372	2,570,078	11,423
Home Furnishings Stores	1,625,867	9,975	3,838,094	23,547	6,477,950	39,742
Electronics & Appliance Stores	2,804,756	8,274	205,439	606	6,577,454	19,403
Building Material & Supplies	(7,245,752)	(31,780)	(74,710,430)	(327,677)	(65,894,169)	(289,010)
Lawn and Garden Equip & Sup.	27,475	121	84,829	372	174,046	763
Grocery Stores	(37,078,189)	(95,072)	(62,516,914)	(160,300)	(43,319,016)	(111,074)
Specialty Food Stores	1,074,437	2,149	(1,363,522)	(2,727)	(2,638,748)	(5,277)
Beer, Wine, and Liquor Stores	3,156,070	12,425	3,920,223	15,434	5,620,127	22,126
Health & Personal Care Stores	(642,546)	(1,575)	(15,789,848)	(38,701)	1,554,175	3,809
Clothing Stores	(13,460,325)	(67,302)	(7,258,890)	(36,294)	(5,498,822)	(27,494)
Shoe Stores	(2,334,251)	(10,610)	(1,898,705)	(8,630)	(2,005,202)	(9,115)
Jewelry, Luggage, & Leather Gds	145,462	321	947,574	2,092	2,454,818	5,419
Sporting Goods/Hobby/Music Instr.	(1,433,785)	(6,763)	(3,263,538)	(15,394)	(1,424,869)	(6,721)
Book, Periodical, and Music Stores	1,277,548	5,755	4,228,347	19,047	7,723,410	34,790
Department Stores	(341,451)	(1,856)	(328,981)	(1,788)	(1,686,152)	(9,164)
Other General Merchandise Stores	(3,849,354)	(20,920)	(10,335,463)	(56,171)	(48,235,332)	(262,149)
Florists	157,009	924	558,355	3,284	1,241,327	7,302
Office Supplies, Stationery, and Gift	32,562	133	1,141,226	4,658	4,243,848	17,322
Used Merchandise Stores	1,868	9	398	2	673,752	3,369
Other Miscellaneous Retailers *	1,492,907	6,118	3,392,017	13,902	6,653,763	27,270
Full-Service Restaurants	1,830,444	6,061	11,780,761	39,009	21,095,061	69,851
Limited-Service Eating Places	635,770	2,031	7,852,495	25,088	12,069,375	38,560
Special Food Services	3,193,462	15,967	9,105,248	45,526	9,771,478	48,857
Drinking Places (Alcoholic Bev.)	1,472,809	4,993	2,932,196	9,940	5,748,048	19,485

The leakage analysis shows that, in some retail categories, the existing supply of businesses are not meeting the current market demand of trade area residents. The retail categories are listed in the following table in order of descending leakage (in terms of square footage).

As previously stated, it is not expected that businesses within in a trade area would necessarily achieve 100% capture, much depends on the quality and proximity of available offerings beyond the trade area, however, these categories represent market opportunities that should be further explored. Residents are currently traveling beyond the trade area to acquire these goods and services. It might be possible to capture those sales if comparable offerings could be offered within the trade area. The following table illustrates the amount of square footage that could be supported given various market capture scenarios.

## Summary of Unmet Demand

### .5 Mile Radius

Business Type	Unmet Demand/ Leakage		Additional Supportable S.F. Given Various Market Capture		
	\$ Amount	Square Feet	30%	60%	90%
Home Furnishings Stores	1,625,867	9,975	2,992	5,985	8,977
Electronics & Appliance Stores	2,804,756	8,274	2,188	4,796	7,404
Book, Periodical, and Music Stores	1,277,548	5,755	1,041	3,061	5,081
Other Miscellaneous Retailers *	1,492,907	6,118	1,027	3,209	5,391
Drinking Places (Alcoholic Bev.)	1,472,809	4,993	334	2,331	4,327
Beer, Wine, and Liquor Stores	3,156,070	12,425	(1,715)	4,345	10,405

### 1 Mile Radius

Business Type	Unmet Demand/ Leakage		Additional Supportable S.F. Given Various Market Capture Scenarios		
	\$ Amount	Square Feet	30%	60%	90%
Book, Periodical, and Music Stores	4,228,347	19,047	4,636	10,812	16,988
Home Furnishings Stores	3,838,094	23,547	2,089	11,285	20,481
Other Miscellaneous Retailers *	3,392,017	13,902	(1,857)	4,897	11,651
Drinking Places (Alcoholic Bev.)	2,932,196	9,940	(4,535)	1,669	7,872
Limited-Service Eating Places	7,852,495	25,088	(23,720)	(2,802)	18,115
Full-Service Restaurants	11,780,761	39,009	(23,834)	3,099	30,032

### 1.5 Mile Radius

Business Type	Unmet Demand/ Leakage		Additional Supportable S.F. Given Various Market Capture Scenarios		
	\$ Amount	Square Feet	30%	60%	90%
Book, Periodical, and Music Stores	7,723,410	34,790	5,134	17,844	30,554
Florists	1,241,327	7,302	(654)	2,756	6,165
Jewelry, Luggage, & Leather Gds	2,454,818	5,419	(3,637)	244	4,125
Home Furnishings Stores	6,477,950	39,742	(4,308)	14,570	33,449
Other Miscellaneous Retailers *	6,653,763	27,270	(5,193)	8,719	22,632
Office Supplies, Stationery, and Gift	4,243,848	17,322	(9,263)	2,131	13,524
Drinking Places (Alcoholic Bev.)	5,748,048	19,485	(10,315)	2,457	15,228

### Market Opportunities Beyond Categories with High Sales leakage

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

In the categories that show very little or negative leakage, the market opportunity for new businesses would depend on their ability to:

- attract customers from beyond the trade area and/or other market segment such as employees, commuters, and visitors, or
- offer higher quality, better priced or otherwise, more desirable product or service and therefore overtake/replace less desirable current businesses.

## Upham's Corner Business District Scorecard

Criteria for Evaluating New Businesses, Business Expansion  
& Real Estate Development

To What Degree will the New Business or Development:	High	Med.	Low	N/A
1. Generate significant customer traffic that could benefit other businesses.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2. Increase the variety and selection of goods & services.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3. Result in the addition of target business types to the District (i.e., coffee shop, sit down restaurant, _____, _____, _____ or _____)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4. Complement the existing business clusters targeted for expansion (i.e., Restaurants & Entertainment, Arts & Creative Businesses, Food & Daily Needs, Urban Clothing, Family Clothing & Accessories, _____, or _____)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5. Be open for business during evenings and weekends businesses.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6. Have significant "walk-in" trade if located on the first floor .	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7. Create job opportunities for neighborhood residents.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
8. Result in the addition of a new business or property owner that has track record of positive community involvement/being a good corporate neighbor.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
9. Improvement in the aesthetic appeal of the District.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
10. Preserve the historic character and architecture.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
11. Be environmentally responsible.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
12. Will not be disruptive in terms of traffic and parking.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
13. Will likely result in a long-term positive benefit for the Business District.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
14. Will be an active partner/participant in the District.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>