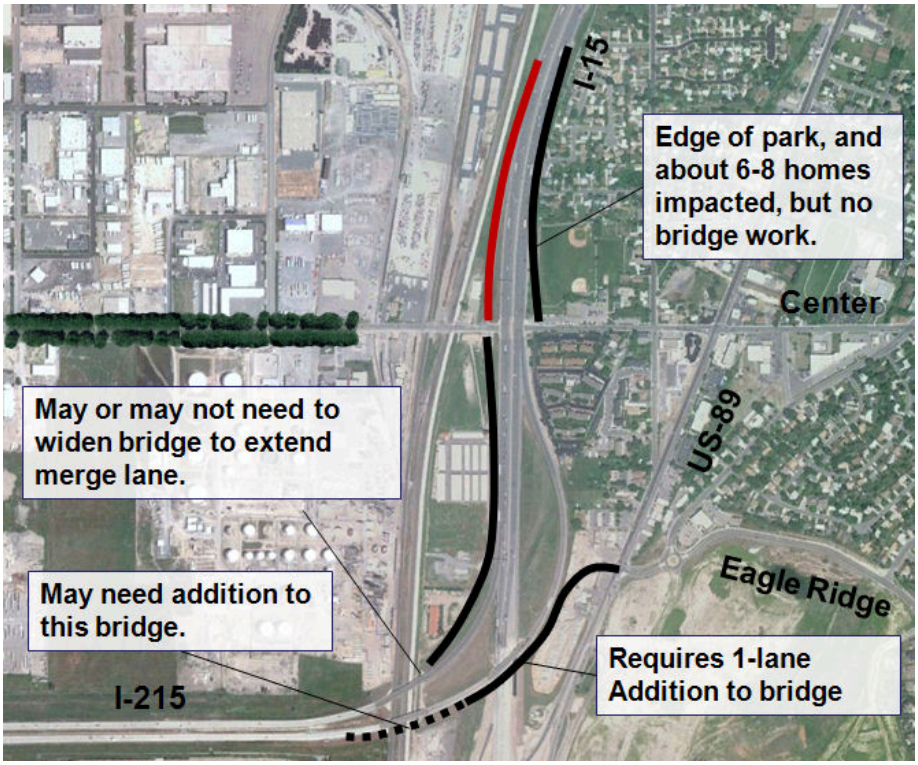
9 APPENDIX

Transportation

Alternative Interchange Improvement Concepts

Half Trumpet Interchange, Town Center

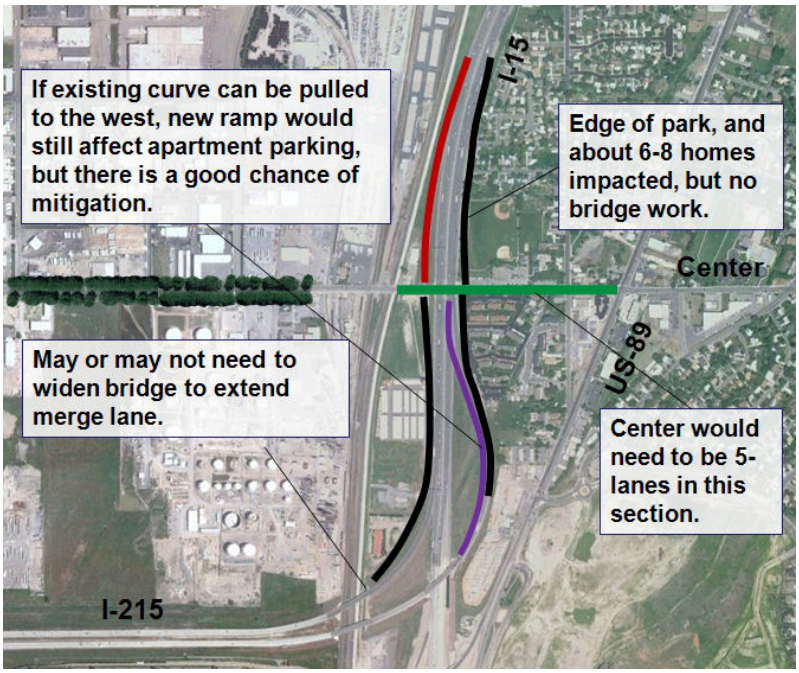
Almost the same as the preferred concept, but moves the NB on-ramp into a tight-diamond configuration that would impact the park and a few homes. It may cost less than the previous design, because the I-215 to I-15 curve would not need realignment, and there would be no additions to the Center Street overpass. It may also be easier to merge on-ramp traffic with I-15, but that would need to be investigated later.

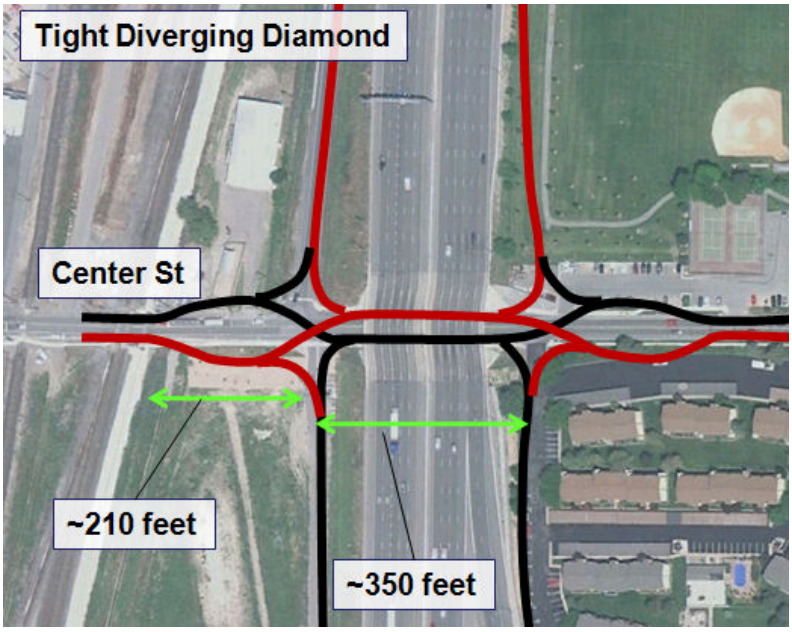


Tight Diamond, or Tight Diverging Diamond

A concept for a tight diamond, and a tight diverging diamond are shown in the drawings below. They both appear to be compatible with the existing bridge under I-15 at Center Street, though both would require removing the slopes under the existing deck and replacing them with vertical retaining walls. It would impact the western driveway to the apartment complex and some of their parking. It would impact the park and some homes just north of the park. There is very short spacing available for everything, and it simply may not work.

Because all of the ramps would be tied directly to Center Street, Center would have to be widened to a 5-lane cross-section, likely across the tracks as well (which does not necessarily imply the railroad would need to be grade separated). While many people could avoid using the Redwood interchange (reducing track crossing), others would be attracted to use Center Street, so it is not clear whether or not the volumes crossing the tracks would actually reduce much. This is an interesting idea, but the City should pursue other options first.





Justification for Three Transit Stops in the Town Center

The City would like to see three stations developed in the Town Center, but should anticipate that UTA may be reluctant to provide

this many. This section outlines why they would be concerned, and arguments the City can use to address their concerns.

Balancing Access and Speed

There is a need to balance the need for high speeds, and the need for frequent access. When transit has many frequent stops, it has great access for more residents and businesses – facts that should increase ridership, but it also becomes slow and unattractive for many users, which will tend to decrease ridership.

Transit is therefore organized by mode and by purpose. Routes designed to attract long-distance commuters, like FrontRunner, may have stops only every 5 miles. Light Rail standards are typically 1-mile spacing in the suburbs, and half-mile spacing or less in Downtown.

Streetcar and BRT often have dual purposes. One is to help transport local area patrons to job centers that might be 5-10 miles away, rather than 10-50 miles away. The other is to provide local circulation within the immediate communities they serve. To meet this dual role, streetcar and BRT stops are usually spaced at third to a half mile, and usually not more than one-mile.

Between 3800 South and the entrance to Beck Street, there is room for North Salt Lake to have 3 stations at roughly ½ mile spacing. With the level of intensity being planned in this area, it makes sense to have all three. In agreeing to the lower-cost streetcar, NSL should insist on having stations at all three locations.

Issues Surrounding Center Street Railroad Crossing

Grade separation improvements at the railroad crossing are extremely problematic and cost prohibitive attention should instead be focused on lowering traffic volumes or easing congestion through other potential improvements.

Center Street is one of just two significant east-west streets that connect the western and eastern portions of the city. Land uses along Center Street generate comparatively low amounts of traffic, but Center has fairly high levels of traffic nonetheless because residents

in the eastern portion of the city are dependent upon the Redwood/I-215 interchange. As the Town Center and the Redwood area each grow, volumes will increase on Center, increasing the need to do something about the railroad crossing, but volumes will probably never be high enough to compel the herculean construction required to grade separate Center from the three railroad crossings.

Factors that make grade separation cost prohibitive

Center Street between I-15 and the three railroad tracks is fraught with challenges. There is about 320 feet between the western edge of the I-15 underpass and the first track. The new bridge over the tracks in Kaysville has about 430 feet from where it first starts to rise until it reaches the first track. To go over the tracks, Center would have to start its rise while still under I-15. It may be possible to lower Center as it starts under I-15, so that it can begin to rise while still under I-15, but that is beyond the scope of this General Plan.

Going under the tracks is the other option. This would require that Center start its descent under the tracks while still under I-15. It is uncertain how deep the excavation under I-15 would be. If very significant, it could require additional effort to stabilize the existing structure. Another major issue with going under the tracks involves groundwater pumping. The excavation would be far below the water table, which means pumps would likely run non-stop to keep the underpass free of water.

Whether over or under the tracks, there is nearly 600 feet between the three tracks, which involves significant fill and bridge work. There are also driveway accesses to properties between the tracks. In 2011 dollars, a low estimate might be about $30-million, and costs could run to $60-million or higher. If Center Street were a high-volume arterial, such expense is easier to justify. But as a collector of modest volume, and a reasonable strategy to lower volumes, this will be difficult to justify within the foreseeable future.

Documented Effects of Lane Widths

A literature search suggests that reducing lane widths from 12 feet to 11 or even 10 feet has a tendency to lower driver's speeds by 1-3 mph per foot of narrowing, a positive effect on safety for roadways under 45 mph design speed, and has an almost negligible effect on the

FHWA's July 2007 "Mitigation Strategies for Design Exceptions"

In a reduced-speed urban environment, the safety effects of reduced lane width are positive. On such facilities, the risk of lane-departure crashes is less. The design objective is often how to best distribute limited cross-sectional width to maximize safety for a wide variety of roadway users. Narrower lane widths may be chosen to manage or reduce speed and shorten crossing distances for pedestrians. Lane widths may be adjusted to incorporate other cross-sectional elements, such as medians for access control, bike lanes, on-street parking, transit stops, and landscaping. Lane widths of 10-11 feet in the urban, low-speed environment normally provide adequate flexibility to achieve a desirable urban cross section.

capacity of such roadways. Consider these selections from the literature:

From NCHRP 330, *"Effective Utilization of Street Width on Urban Arterials":*

> *"All projects evaluated during the study that consisted exclusively of lane widths of 10 or 11 feet resulted in accident rates that were either reduced or unchanged." (Referring to urban arterials with speed limits of 45 mph or less).*
>
> *"Relationship of Lane Width to Safety for Urban and Suburban Arterials"* TRB 2007 Annual Meeting:
>
> *"A safety evaluation of lane widths for arterial roadway segments found no indication, except in limited cases, that the use of narrower lanes increases crash frequencies. The lane width effects in the analyses conducted were generally either not statistically significant or indicated that narrower lanes were associated with **lower** rather than higher crash frequencies."*

Conserve By Bike Program Study Final Report, FDOT, Tallahassee, FL, 2007.

"Measured saturation flow rates are similar for lane widths between 10 and 12 feet, but there is a measurable decrease below 10 feet. "Thus, so long as all other conditions are constant, there is no measurable difference in urban street capacity when lane widths are narrowed from 12 to 10 feet."

Lane Width and Speed

There is no clear consensus in the literature on the relationship between lane width and speed. Some studies have shown speed reductions of as much as 3 mph for every foot of lane narrowing; other studies show a more slight speed reduction of about 1 mph per foot of lane narrowing or no significant effect at all. The studies generally agree that there is wide variability between sites, suggesting that lane width alone is not responsible for the entire speed reduction.

If the street in question is not critically needed for high-speed travel, and there is desire to increase pedestrian-oriented uses, narrowing travel lanes can contribute to an overall context encouraging drivers to reduce their speed.

Lane Width and Capacity

Chapter 16 of the Highway Capacity Manual describes factors that affect the capacity of arterial streets, and it has a 3.33% reduction in capacity for each foot less than 12 feet.

Recent research suggests that narrowing streets may have almost no perceptible impact on flow rates until lane widths drop to 9-feet. A 2007 literature review sponsored by the Florida Department of

Transportation, suggests there may be no perceptible difference in capacity between 10-12 feet.

Alternative Intersection Primer

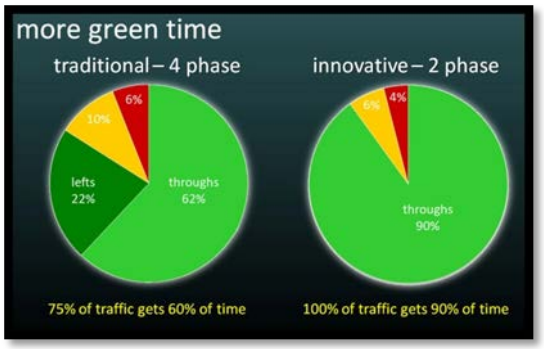
All over the world, congestion hinders life. Intersections increase to accommodate double, and then triple lefts, leaving no room for anything but cars. Traffic signals are simply asked to do too much.

High-Volume, Place-Making Intersections

But what if you could drive slower, travel faster, and have extra space for Complete Streets? A new breed of intersections, collectively known as Alternative Intersections, makes this more possible.

Traditional four-phase intersections have left-turn arrows, and frequently two and now even three left-turn lanes. Arrows reduce intersection efficiency. As a result, you may inch forward watching the light ahead turn green and red several times before you reach the front of the line.

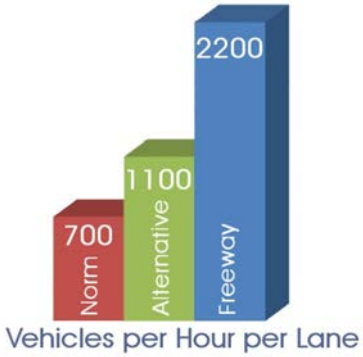
Historically, the next solution is to build a bridge, but bridges are incredibly expensive and may not fit well with the context. Innovative Intersections do not need bridges. Yet like bridges, they eliminate left-turn arrows, serving more vehicles with less delay.



So instead of designing auto-oriented corridors where you race at 45 mph or higher, only to be stopped for several minutes at each signal, now we can design multi-modal complete streets where you might

NORTH SALT LAKE DIRECTIONS
FINDING OUR TRUE NORTH

www.alternativeintersections.org



travel just 30-35 mph through a quality pedestrian environment and still travel faster, because you get more green!

Continuous Flow Intersections

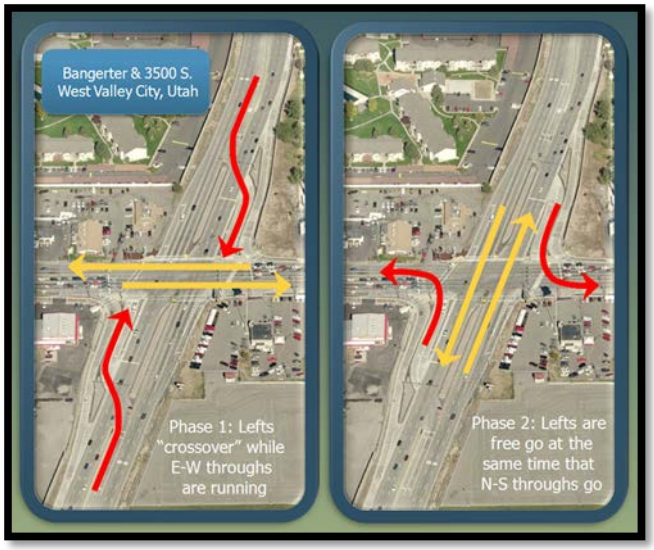
The CFI was first seen in Mexico over 20 years ago, where there are reportedly upwards of 50. They are catching on fast in the United States. The nation's third opened in April 2006 in Baton Rouge, LA for a total cost of $4.4 million. Where vehicles had been delayed an average of 4-minutes before the project, this was reportedly reduced to below 1-minute after.

The fourth CFI opened in Salt Lake in 2007, and a month later the fifth opened in St. Louis. Utah's DOT was so impressed, they've since built half a dozen, and have a dozen more in early or advanced planning.

www.continuousflowintersections.org

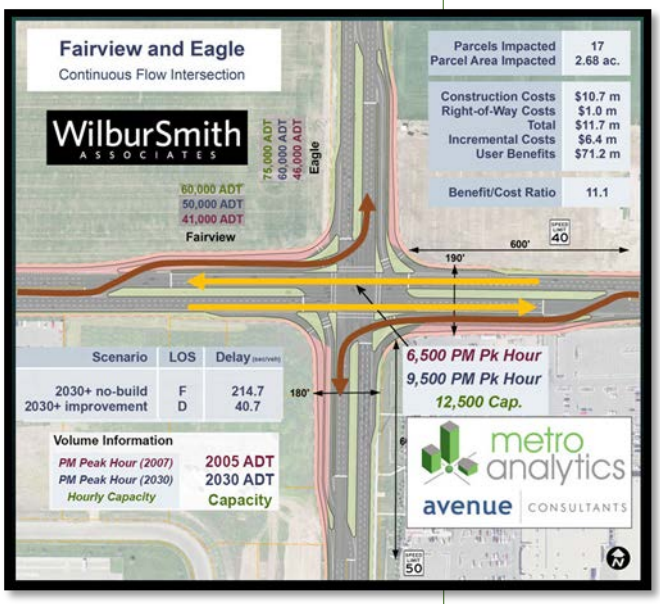
How they work

At a traditional intersection, through traffic must wait while left turns get their "arrow." The magic of a CFI is that it allows opposing lefts and throughs to occur at the same time using one signal at the main intersection, and up to four interconnected mid-block signals (one for each leg with the strategy). For example, while east-west traffic is moving, lefts on the north-south street cross-over oncoming traffic at a mid-block intersection. Then when north-south signals turn green, both through and left can go at the same time, because lefts are already on the opposite side of oncoming traffic.



It looks complex from the air, but

has proven simple for drivers to understand. Controlled simulations suggest that CFIs can reduce intersection delay between 20-90%, depending upon conditions at the site. Capacity or throughput also increases by 15-30% or more. Costs are expected to be about 25-50% higher than building a traditional intersection, excluding right of way costs.



Advantages

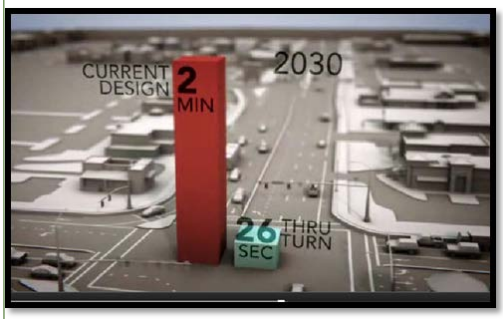
- Improved capacity
- Reduced delay and travel time
- May prevent need to add lanes
- May be lower cost than alternatives
- Fits with driver expectancy
- Interim step to freeway interchange

Disadvantages

- Other choices more ped-friendly
- Strict access control
- Often requires extra space
- Initial driver confusion

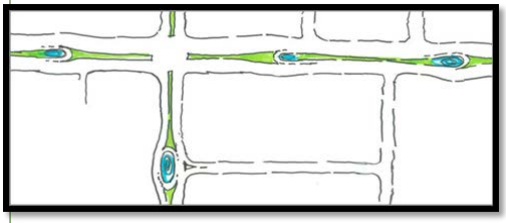
www.ThruTurnIntersections.org

ThrU-Turn Intersections (TTI)



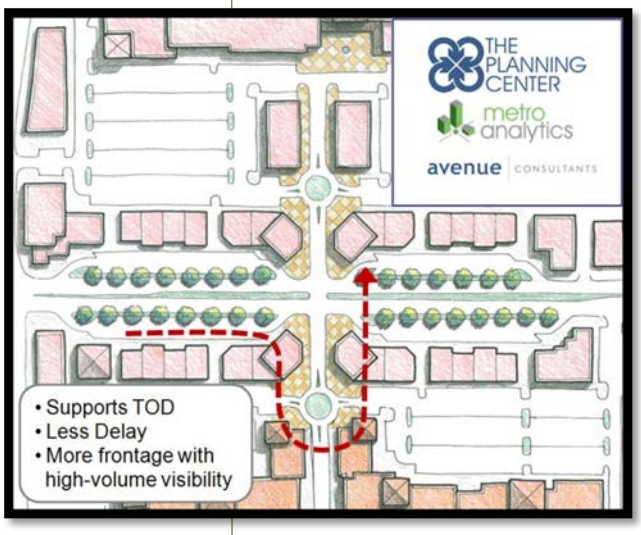
Have you ever tried to turn left from a parking lot onto a busy arterial, and found it so impossible to get a gap in both directions that you instead went right, then made a U-turn? A ThrU-Turn simply formalizes this action.

How they work



In the diagrams, some lefts are completed as "right-U-through." Others are "through-U-right." Bowties, Loons, Michigan-lefts, Median-U's, Superstreets, and even roundabouts can be classified in the ThrU-Turn family. A Bowtie (below & right) using an ellipse or

roundabout can be aesthetically very nice with trees, monuments, or a transit station.

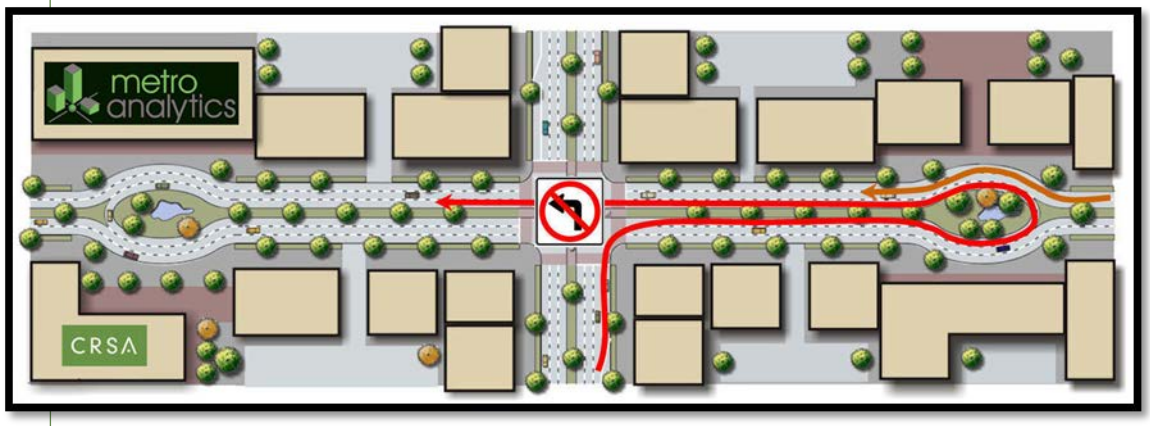


Advantages

- Impressive capacity gains
- Better traffic progression
- Former lefts reclaimed for center-running transit, pedestrian refuge, etc.
- Safer for both autos and pedestrians
- Enhances and motivates TOD
- Often very low cost
- Can enhance retail frontage
- Operate as innovative or traditional
- Facilitates planted medians, access control, local circulation.

Disadvantages

- Out of direction travel
- Initial confusion for drivers
- Space required for bulb-outs
- Educational effort to win over skeptics



Quadrant Roadway Intersections

Have you ever seen people cut through a parking lot or take a back-way because congestion was so bad? A quadrant roadway formalizes this creative way to make a left.

There are innumerable intersections across America that can be upgraded to a QRI using existing "back-way" streets, or by developing such streets through existing parking lots.

www.Quadrantintersections.org

How they work

The QRI is extremely versatile. It can be operated as a "mini-cloverleaf," where 3-rights make a left. Or it can be operated similar to a CFI, where people use a mid-block intersection, but instead go behind existing development.

Preserving the Option for Quadrants

Recommendation: for major intersections amidst new development, require a "backage road" on each quadrant, zoned with compatible uses (avoid single-family).

Initially, use them as normal right-in, right-our local streets. In the short term, the streets provide better connectivity. In the long run they are "get out of jail free" cards to be invoked at any time to reroute lefts, reducing congestion and freeing up former turn pockets in support of a stronger Activity Center.

Advantages

- Impressive capacity gains
- Former lefts reclaimed for center-running transit, pedestrian refuge, etc.
- Safer for both autos and pedestrians
- Expands grid connectivity
- Enhances and motivates TOD
- Often very low cost
- Easy access to retail
- Back-side auto access

- Buildings easily front the street
- Compatible with traditional signals
- Expands grid within Activity Center

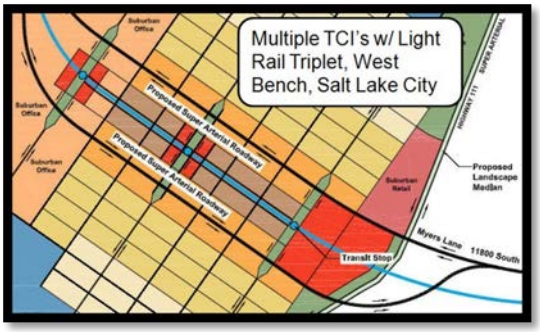
Disadvantages

- Initial confusion for drivers
- Potential out of direction travel
- May add signals to corridor
- Resistance when adding traffic to existing residential backway

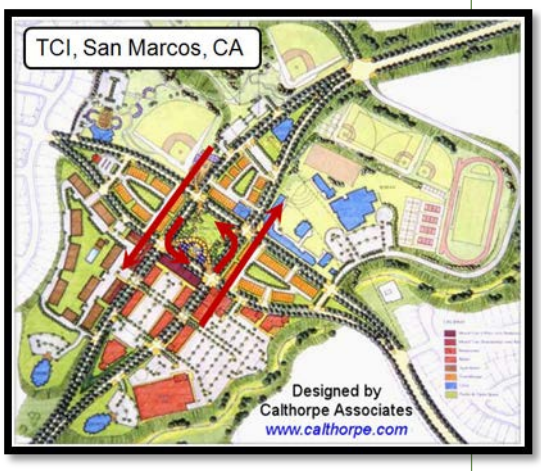
Town Center Intersections

A Town Center Intersection occurs when one or both streets is a one-way street. Many New Urbanist communities are taking what would have been a single huge intersection and splitting it up into two or four more manageable intersections at the heart of an Activity Center. A TCI system can include a "triplet", which is an alignment between couplets, perhaps used for transit, pedestrian mall, and on-street angle parking.

Since each street has half the number of lanes, streets are narrower and easier to cross, and have fewer conflict points. Speed limits can be reduced if desired, but you still travel faster due to better signal coordination and more green time at each intersection!



www.TownCenterintersections.org



How they work

One-way streets allow drivers a free-left turn as well as a free-right. More signals, but each signal has fewer phases and less delay. Crossing is easy because you only need a gap in one direction.

Hot New Mixed-Use Design

San Diego, Las Vegas, Salt Lake, and others have incorporated this design into several mixes use projects – often paid by developers.

Advantages

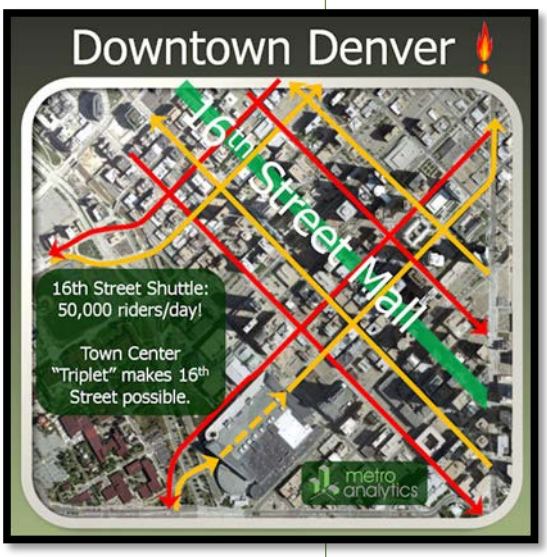
- Significant new system capacity
- Drive slower, travel faster
- Narrower, Complete Streets
- Safer for both autos and pedestrians
- Supports very high densities
- "Free" when built by developers
- Easy access to retail
- Expands grid within Activity Center

Hot – but not really so new

Denver, Portland, Boise, Manhattan – TCIs are much of the reason our highest density urban cores are great, sustainable Places!

Disadvantages

- Confusion in places with few one-ways
- Challenge convincing business this is good
- Minor out of direction travel



www.DivergingDiamond.org

Diverging Diamond Interchanges

What was one of Popular Science's "Top 100 Innovations" for 2009? What traffic innovation was featured in Time Magazine's Feb. 7, 2011 edition? Which project won AASHTO's 2010 Francis B. Francois Award for Innovation? The Diverging Diamond Interchange!!

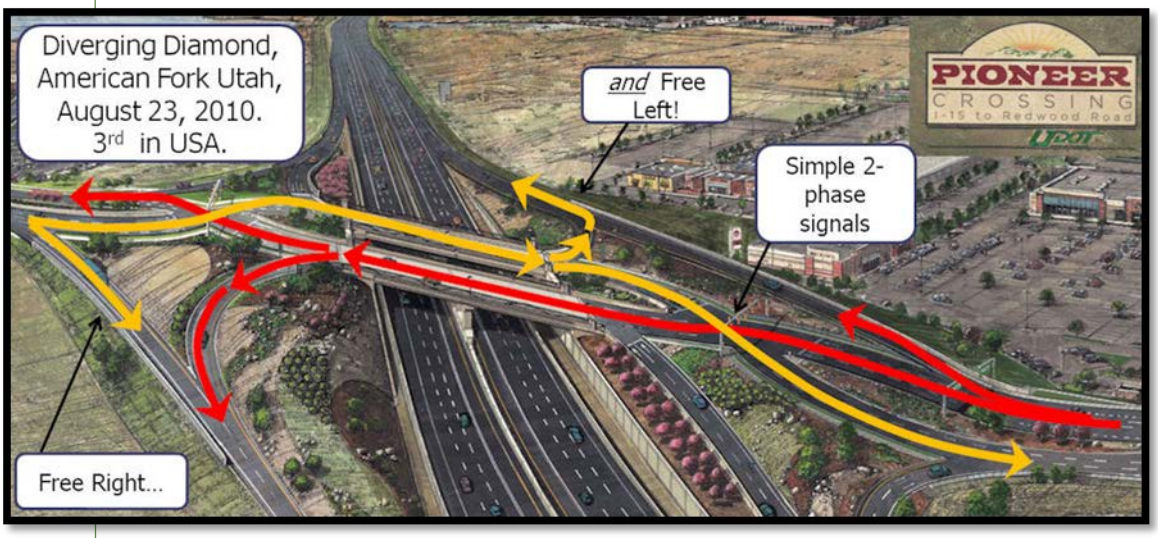
How they work

In this diagram of the USA's 3rd DDI, recently opened in Utah, notice the orange stream where a free-right peels off to the south as at a normal diamond interchange. Then the EB and WB streams cross over so that a "free left" can be made, after which the streams cross back to the normal side of road. That free left can greatly reduce congestion, increase capacity, and even reduce construction cost as compared to many conventional designs. It also lowers conflict points, improving safety. In many cases existing diamonds can be modified at low cost without impacting bridge structures or additional right-of-way.

Three DDI's have existed in France for 25 years or more. These older versions lack the signage, route markings, and enhanced geometry that is featured in designs that are advancing rapidly to approval in the United States.

Will drivers be confused by driving on the "wrong side" and end up disastrously in the wrong place at the wrong time? This has not proven to be an issue.

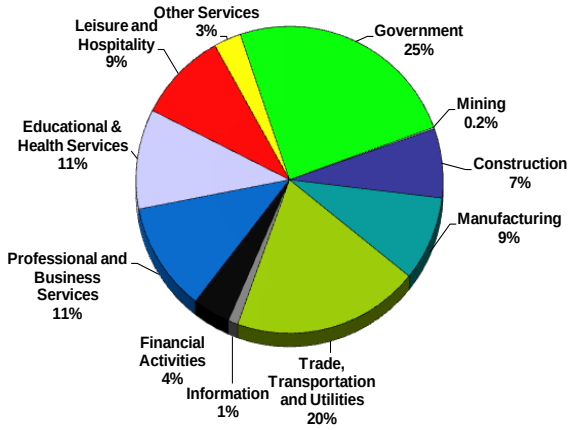
Many older interchanges can be easily converted to a DDI, saving millions. New designs feature great channelization, signs, and markings to make it very difficult for a newcomer to do the wrong thing. Designs can also establish a visual barrier to minimize the sense of being on the wrong side.



Economic Development

Employment growth potential

Five (5) employment sectors make up 76% of current Davis County employment:



Davis County Jobs

Davis County as of July 2011	
Labor Force	148,096
Employment	137,587
Unemployment	10,509
Unemployment Rate	7.10%

Source: Utah Department of Workforce Services, April 2011

Job Growth - Utah Metro Ten Year Projections

North Salt Lake should target the recruitment of the high growth jobs in the following sectors:

- Transportation
- Health care businesses
- Manufacturing and wholesale trade
- Professional services

The recommended industry targets pay higher wages, contribute to the local tax base and offer more career ladder opportunities.

Job Growth Utah Metro 10 Year Projections	Annual Growth Rate	Annual Openings		
		Growth	Replace ments	Totals
Transportation and Material Moving Occupations	1.50%	1,150	1,830	2,980
Healthcare Practitioners and Technical Occupations	3.70%	1,870	1,020	2,900
Production Occupations	0.90%	840	1,600	2,440
Installation, Maintenance, and Repair Occupations	1.90%	880	930	1,810
Healthcare Support Occupations	4.90%	1,200	290	1,490
Material Recording, Scheduling, Dispatching, and Distributing Workers	1.40%	410	690	1,100
Engineers	2.10%	260	290	550
Physical Scientists	2.30%	50	60	110
TOTALS		6,660	6,710	13,380

Source: Utah Department of Workforce Services, April 2011

Estimated Davis County Job Growth

Estimated Davis County Ten Year Job Growth @ 7.3%	At 7.3% Capture Rate	At 10% Capture Rate
Transportation and Material Moving Occupations	218	298
Healthcare Practitioners and Technical Occupations	212	290
Production Occupations	178	244
Installation, Maintenance, and Repair Occupations	132	181
Healthcare Support Occupations	109	149
Material Recording, Scheduling, Dispatching, and Distributing Workers	80	110
Engineers	40	55
Physical Scientists	8	11
TOTALS	977	1,338

Source: Utah Department of Workforce Services, April 2011

With aggressive economic development, North Salt Lake can anticipate expanding its job base by 1,000 new jobs during the next decade despite the current national economic downturn.

This projected job growth during the next decade will generate a demand for 348,000 square feet of new or converted industrial and business park space on 22.5 acres of land.

In order to influence the type of jobs to be created North Salt Lake should target the recruitment of Transportation, Health care businesses, Manufacturing and wholesale trade and Professional services. These recommended industry targets pay higher wages, contribute to the local tax base and offer more career ladder opportunities for local residents.

Retail growth potential

Town Center Area:

- Section one looks at the Town Center market area and presents key economic and demographic information for 2010 and projects key data to 2015.
- Section two examines the market potential for a Town Center in North Salt Lake and seeks to answer the following key questions:
  - What is the market potential of the North Salt Lake Town Center?
  - Why?
- Section three examines the market potential and seeks to answer the following key questions:
  - Who could or should be establishing a business in the Town Center?
  - Why would they want to establish a business in the North Salt Lake Town Center?
  - How the North Salt Lake Town Center area:
    - Is different from what they will experience from anyone else,
    - Is different from what they already have, and
    - Is something that their customers will value, and
  - What is keeping them from establishing a business in the North Salt Lake Town Center?

North Salt Lake Town Center Market Potential

The following commercial market opportunities for a Town Center are defined by:

- Demand - the number of consumers in the defined market area, the income, family size and purchasing characteristics of those potential customers.
- Supply - the current retail sales within the Town Center market area within those categories.
- Gap - the difference between Demand and Supply. Can be a positive number (opportunity for new retail expansion) or negative (possible current retail oversupply).

The commercial market area for the Town Center is defined by the following general customer shopping patterns. For example:

- ***Neighborhood Shopping Primary Market Area.*** A "Neighborhood" center provides for the sale of convenience goods (foods, drugs and sundries) and personal services (laundry, dry cleaning, barbering, shoe repairing, etc.) for the day-to-day living needs of the immediate neighborhood. It is built around a supermarket as the principal tenant. In theory, the neighborhood center has a typical gross leasable area (GLA) of 60,000 square feet. In practice, it may range in size from 30,000 to 150,000 square feet. A Neighborhood center occupies 3-15 acres and has a Five Minute Drive Time market area.
- ***Community Shopping Primary Market Area. T***he "Community" center provides a wider range of facilities for the sale of soft lines (wearing apparel for men, women and children) and hard lines (hardware and appliances). Many are built around a discount apparel store, a home improvement store or a discount department store as the major tenant, in addition to a supermarket. In theory, its typical size is 150,000 square feet of gross leasable area (GLA), but in practice, it may range in size from 100,000 to 350,000 or more square feet. A Community center occupies 10-40 acres and has a ten minute drive time market area. A limited number of businesses were considered relevant for the Town Center.

Regional, Super Regional and other Shopping Primary Market Areas were not considered relevant for the Town Center.

A Primary Market Area is the area from which 60-80% of the center's sales originate

1. Demographic and Economic Analysis

Five Minute Drive Time Neighborhood Shopping Primary Market Area Demographic Summary

A "Neighborhood" center provides for the sale of convenience goods (foods, drugs and sundries) and personal services (laundry, dry cleaning, barbering, shoe repairing, etc.) for the day-to-day living needs of the immediate neighborhood. It is built around a supermarket as the principal tenant. In theory, the neighborhood center has a typical gross leasable area (GLA) of 60,000 square feet. In practice, it may range in size from 30,000 to 150,000 square feet. A Neighborhood center occupies 3-15 acres and has a five minute drive time market area.

The market areas is predominately owner occupied family households.

Year	2000	2010	2015
Population	18,544	20,541	22,644
Households	6,039	6,894	7,691
Families	4,776	5,361	5,900
Average Household Size	3.05	2.96	2.93
Owner Occupied Housing Units	4,243	4,752	5,362
Renter Occupied Housing Units	1,796	2,142	2,329
Median Age	28.6	29.6	30.0

Source: U.S. Bureau of the Census, 2000 Census of Population and Housing. ESRI BIS forecasts for 2009 and 2014, Bonneville Research 2011.

Forty five (45%) percent of the households in the market area have annual incomes of $75,000 or greater.

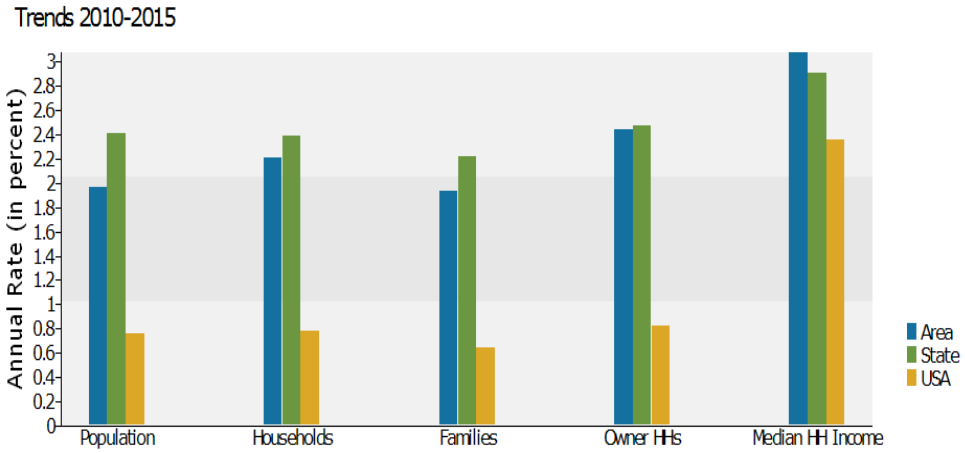
Neighborhood Shopping Market Area Demographic Summary – Five Minute Drive Time	2000		2010		2015	
	Number	Percent	Number	Percent	Number	Percent
<$15,000	377	6.1%	308	4.5%	249	3.2%
$15,000 - $24,999	737	12.0%	400	5.8%	321	4.2%
$25,000 - $34,999	811	13.2%	528	7.7%	396	5.1%
$35,000 - $49,999	1,088	17.7%	1,041	15.1%	635	8.3%
$50,000 - $74,999	1,584	25.8%	1,730	25.1%	2,126	27.6%
$75,000 - $99,999	660	10.8%	1,213	17.6%	1,346	17.5%
$100,000 - $149,999	573	9.3%	1,029	14.9%	1,522	19.8%
$150,000 - $199,999	175	2.9%	352	5.1%	676	8.8%
$200,000+	128	2.1%	293	4.3%	420	5.5%

Source: U.S. Bureau of the Census, 2000 Census of Population and Housing. ESRI BIS forecasts for 2009 and 2014, Bonneville Research 2011.

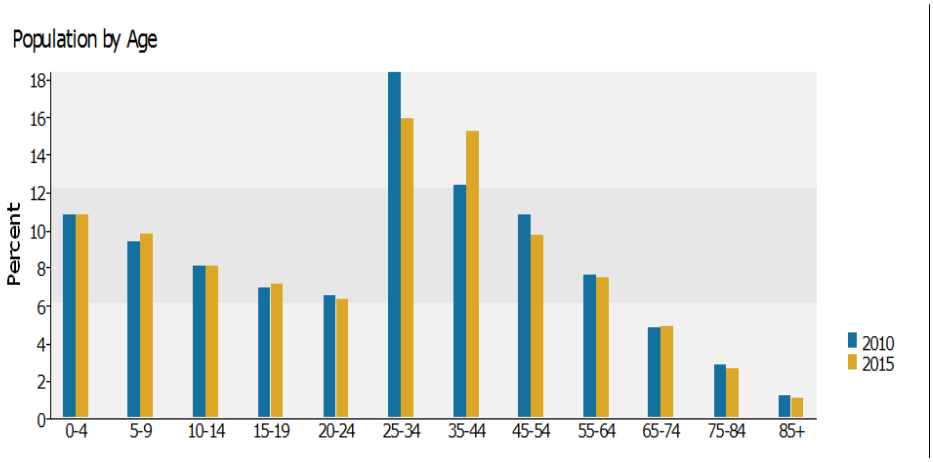
Average household income in the Neighborhood market area is almost $80,000 and the 2009 median disposable income is $52,638.

Neighborhood Shopping Market Area Demographic Summary – Five Minute Drive Time	2000	2010	2015
Median Household Income	$50,597	$65,829	$76,595
Average Household Income	$62,041	$81,593	$95,210
Per Capita Income	$20,779	$26,631	$31,310

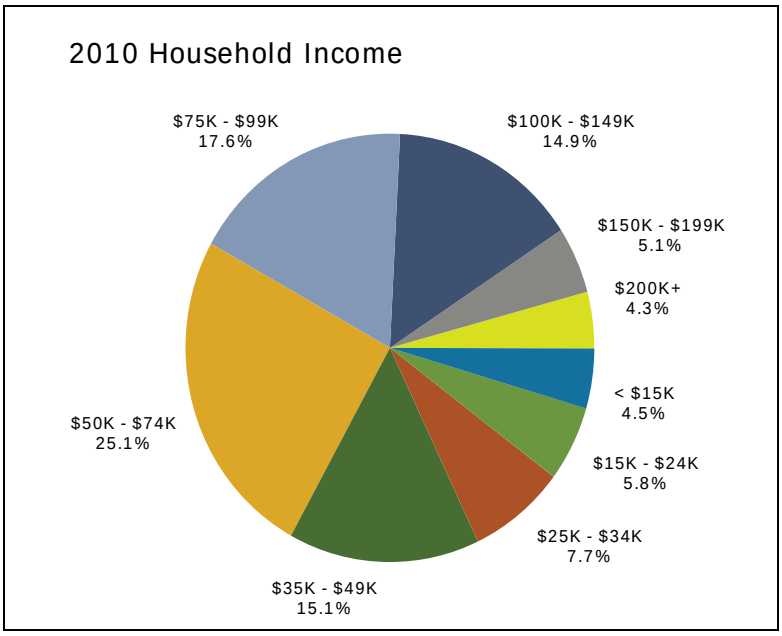
Source: U.S. Bureau of the Census, 2000 Census of Population and Housing. ESRI BIS forecasts for 2009 and 2014, Bonneville Research 2011.



Source: U.S. Bureau of the Census, 2000 Census of Population and Housing. ESRI BIS forecasts for 2009 and 2014, Bonneville Research 2011.



Source: U.S. Bureau of the Census, 2000 Census of Population and Housing. ESRI BIS forecasts for 2009 and 2014, Bonneville Research 2011.



Source: U.S. Bureau of the Census, 2000 Census of Population and Housing. ESRI BIS forecasts for 2009 and 2014, Bonneville Research 2011.

Summary of Demographic and Economic Findings – Neighborhood (5 min) shopping area:

- The Neighborhood shopping (5 min) market area has excellent income, age and other demographics.
- The growth trends in the market area are excellent.
- The Neighborhood market area is predominately owner occupied family households.
- Forty five (45%) percent of the households in the market area have annual incomes of $75,000 or greater.
- Average household income in the Neighborhood market area is almost $80,000 and the 2009 median disposable income is excellent at $52,638.
- The Neighborhood market area is growing faster than the state and the country as a whole.

2. Neighborhood Shopping Primary Market Area Retail Market Potential Summary

North Salt Lake Town Center Market Potential

The commercial market demand for a Town Center in North Salt Lake is defined by the number of consumers in the defined market area, the income, family size and purchasing characteristics of those potential customers. The following chart presents the retail potential analysis for the five minute - Neighborhood shopping primary market area for The North Salt Lake Town Center.

Section two examines the key market potential for a Town Center and seeks to answer the following key questions:

- What is the market potential for a Town Center in North Salt Lake?
- Why?
- Who could or should be establishing a business in the North Salt Lake Town Center?
- Why would they want to establish a business in the Town Center?
- What is keeping them from establishing a business in Town Center
- How is the Town Center area:
  - different from what they will experience from anyone else,
  - different from what they already have, and
  - something that they will value

Neighborhood Consumer Spending - North Salt Lake Five Minute Drive Time Market Area

Neighborhood Consumer Spending shows the amount spent on a variety of goods and services by households that reside in the market area. Expenditures are shown by broad budget categories that are not mutually exclusive. Consumer spending does not equal business revenue.

Neighborhood Consumer Spending	Spending Potential Index	Average Amount Spent per Household	Total Spending
Apparel and Services	83	$1,981.94	$13,663,491
Men's	78	$356.83	$2,459,953
Women's	73	$608.22	$4,193,062
Children's	90	$360.57	$2,485,770
Footwear	58	$241.97	$1,668,127

	Watches & Jewelry	118	$228.65	$1,576,311
	Apparel Products and Services (1)	198	$185.71	$1,280,272
Computer				
	Computers and Hardware for Home Use	120	$230.38	$1,588,221
	Software and Accessories for Home Use	122	$34.67	$239,011
Entertainment & Recreation		119	$3,837.19	$26,453,554
	Fees and Admissions	122	$757.03	$5,218,946
	Membership Fees for Clubs (2)	120	$196.01	$1,351,277
	Fees for Participant Sports, excl. Trips	123	$131.01	$903,190
	Admission to Movie/Theatre/Opera/Ballet	122	$184.60	$1,272,605
	Admission to Sporting Events, excl. Trips	126	$74.90	$516,352
	Fees for Recreational Lessons	124	$169.68	$1,169,764
	Dating Services	109	$0.84	$5,758
	TV/Video/Audio	116	$1,441.98	$9,941,042
	Community Antenna or Cable TV	113	$815.17	$5,619,757
	Televisions	123	$238.78	$1,646,177
	VCRs, Video Cameras, and DVD Players	121	$24.58	$169,465
	Video Cassettes and DVDs	120	$63.40	$437,094
	Video and Computer Game Hardware and Software	126	$70.39	$485,301
	Satellite Dishes	125	$1.57	$10,819
	Rental of Video Cassettes and DVDs	123	$50.60	$348,811
	Streaming/Downloaded Video	119	$1.67	$11,494
	Audio (3)	114	$167.01	$1,151,388
	Rental and Repair of TV/Radio/Audio	116	$8.81	$60,736
	Pets	142	$612.86	$4,225,064
	Toys and Games (4)	119	$173.13	$1,193,545
	Recreational Vehicles and Fees (5)	108	$349.22	$2,407,503
	Sports/Recreation/Exercise Equipment (6)	94	$170.62	$1,176,238
	Photo Equipment and Supplies (7)	120	$124.55	$858,663
	Reading (8)	113	$175.41	$1,209,297
	Catered Affairs (9)	131	$32.38	$223,256
Food		116	$8,936.78	$61,610,188
	Food at Home	114	$5,121.27	$35,306,020
	Bakery and Cereal Products	114	$677.41	$4,670,087
	Meat, Poultry, Fish, and Eggs	114	$1,186.94	$8,182,750

	Dairy Products	113	$563.81	$3,886,906
	Fruit and Vegetables	114	$897.74	$6,189,035
	Snacks and Other Food at Home (10)	115	$1,795.36	$12,377,245
	Food Away from Home	119	$3,815.52	$26,304,169
Alcoholic Beverages		120	$683.88	$4,714,657
Nonalcoholic Beverages at Home		115	$502.95	$3,467,337
Financial				
	Investments	104	$1,815.87	$12,518,622
	Vehicle Loans	119	$5,850.57	$40,333,817
Health				
	Nonprescription Drugs	111	$114.29	$787,941
	Prescription Drugs	106	$529.72	$3,651,875
	Eyeglasses and Contact Lenses	116	$88.99	$613,499
Home				
	Mortgage Payment and Basics (11)	125	$11,681.21	$80,530,290
	Maintenance and Remodeling Services	120	$2,374.53	$16,369,986
	Maintenance and Remodeling Materials (12)	114	$423.72	$2,921,131
	Utilities, Fuel, and Public Services	114	$5,161.11	$35,580,667
Household Furnishings and Equipment				
	Household Textiles (13)	118	$156.42	$1,078,345
	Furniture	120	$722.96	$4,984,102
	Floor Coverings	115	$86.56	$596,736
	Major Appliances (14)	115	$347.37	$2,394,772
	House wares (15)	105	$90.04	$620,726
	Small Appliances	113	$37.14	$256,035
	Luggage	121	$11.23	$77,435
	Telephones and Accessories	83	$35.29	$243,289
Household Operations				
	Child Care	131	$606.51	$4,181,307
	Lawn and Garden (16)	114	$476.38	$3,284,179
	Moving/Storage/Freight Express	117	$70.73	$487,602
Housekeeping Supplies (17)		115	$809.70	$5,582,040
Insurance				
	Owners and Renters Insurance	117	$544.02	$3,750,445
	Vehicle Insurance	117	$1,358.51	$9,365,537
	Life/Other Insurance	114	$475.23	$3,276,214
	Health Insurance	110	$2,120.97	$14,621,951
Personal Care Products (18)		119	$474.32	$3,269,991
School Books and Supplies (19)		120	$128.01	$882,514

Smoking Products		107	$457.20	$3,151,953
Transportation				
	Vehicle Purchases (Net Outlay) (20)	119	$5,229.42	$36,051,593
	Gasoline and Motor Oil	116	$3,322.20	$22,903,231
	Vehicle Maintenance and Repairs	117	$1,102.26	$7,598,999
Travel				
	Airline Fares	122	$560.72	$3,865,604
	Lodging on Trips	118	$515.50	$3,553,891
	Auto/Truck/Van Rental on Trips	126	$46.43	$320,103
	Food and Drink on Trips	118	$512.04	$3,530,023

Source: Consumer Spending data are derived from the 2006 and 2007 Consumer Expenditure Surveys, Bureau of Labor Statistics. ESRI, *Bonneville Research 2011.*
Data Note: The Spending Potential Index represents the amount spent in the area relative to a national average of 100.

Neighborhood Market Potential - North Salt Lake Five Minute Drive Time Market Area

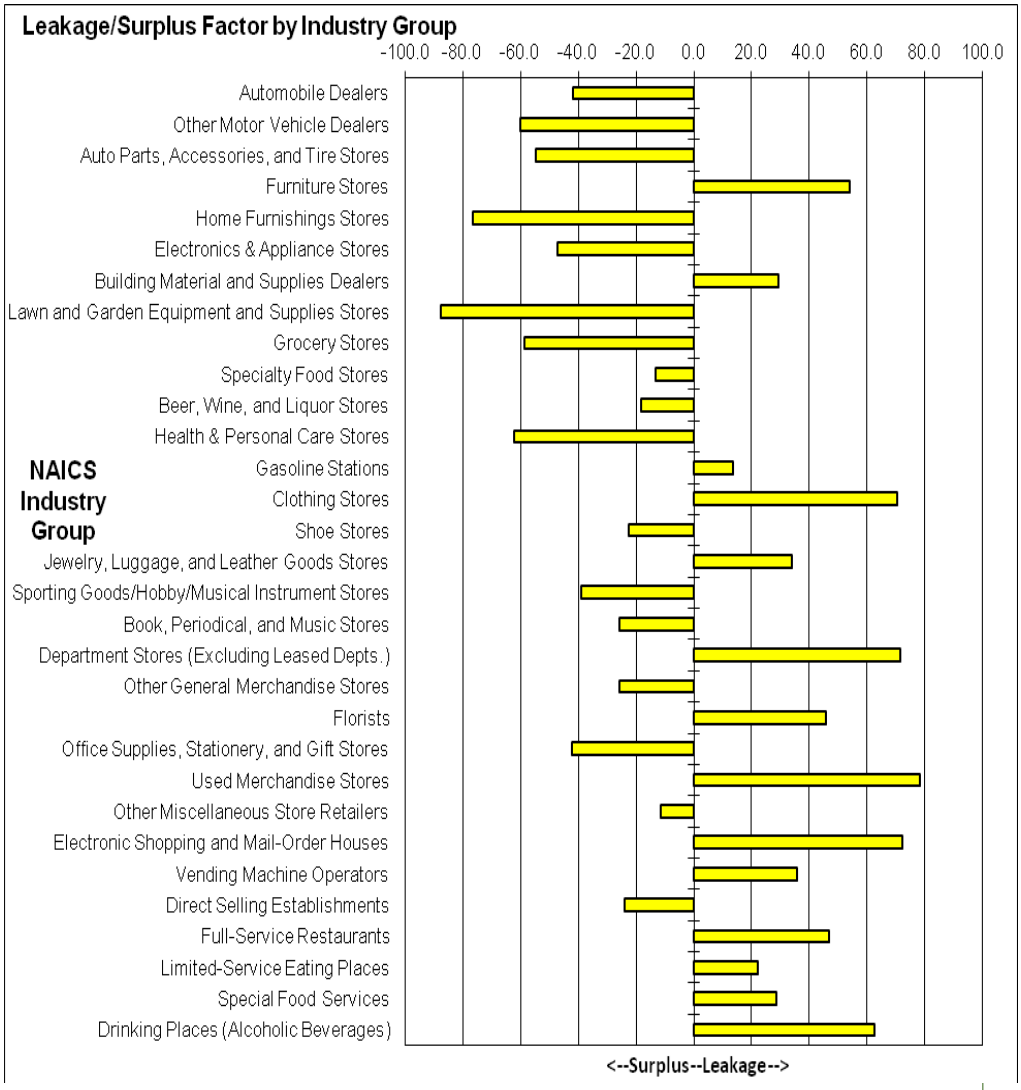
Neighborhood Market Area Retail Potential shows the Supply (retail sales) estimates sales to consumers by establishments. Sales to businesses are excluded. Demand (retail potential) estimates the expected amount spent by consumers at retail establishments. Supply and demand estimates are in current dollars. The Leakage/Surplus Factor presents a snapshot of retail opportunity. This is a measure of the relationship between supply and demand that ranges from +100 (total leakage) to -100 (total surplus). A positive value represents 'leakage' of retail opportunity outside the trade area. A negative value represents a surplus of retail sales, a market where customers are drawn in from outside the trade area. The Retail Gap represents the difference between Retail Potential and Retail Sales. North American Industry Classification System (NAICS) is used to classify businesses by their primary type of economic activity. Retail establishments are classified into 27 industry groups in the Retail Trade sector, as well as four industry groups within the Food Services & Drinking Establishments subsector.

Neighborhood Shopping Market Area Industry Summary – Five Minute Drive Time	Demand (Retail Potential)	Supply (Retail Sales)	Retail Gap (Demand - Supply)	Surplus / Leakage Factor	Number of Businesses
Total Retail Trade and Food & Drink (NAICS 44-45, 722)	$215,354,867	$349,471,655	-$134,116,788	-23.7	173
Total Retail Trade (NAICS 44-45)	$184,459,091	$334,822,349	-$150,363,258	-29.0	143
Total Food & Drink (NAICS 722)	$30,895,776	$14,649,306	$16,246,470	35.7	30

Source: Consumer Spending data are derived from the 2006 and 2007 Consumer Expenditure Surveys, Bureau of Labor Statistics. ESRI, *Bonneville Research 2011.*

Neighborhood Shopping Market Area Industry Summary – Five Minute Drive Time	Demand (Retail Potential)	Supply (Retail Sales)	Retail Gap (Demand - Supply)	Surplus / Leakage Factor	Number of Businesses
Motor Vehicle & Parts Dealers (NAICS 441)	$46,253,204	$120,319,229	-$74,066,025	-44.5	38
Automobile Dealers (NAICS 4411)	$40,258,269	$97,965,928	-$57,707,659	-41.7	20
Other Motor Vehicle Dealers (NAICS 4412)	$3,186,484	$12,728,293	-$9,541,809	-60.0	8
Auto Parts, Accessories, and Tire Stores (NAICS 4413)	$2,808,451	$9,625,008	-$6,816,557	-54.8	10
Furniture & Home Furnishings Stores (NAICS 442)	$2,889,556	$9,275,092	-$6,385,536	-52.5	5
Furniture Stores (NAICS 4421)	$1,715,684	$514,159	$1,201,525	53.9	1
Home Furnishings Stores (NAICS 4422)	$1,173,872	$8,760,933	-$7,587,061	-76.4	4
Electronics & Appliance Stores (NAICS 443/NAICS 4431)	$2,281,022	$6,338,739	-$4,057,717	-47.1	11
Bldg Materials, Garden Equip. & Supply Stores (NAICS 444)	$7,670,840	$13,420,372	-$5,749,532	-27.3	18
Building Material and Supplies Dealers (NAICS 4441)	$7,035,969	$3,857,967	$3,178,002	29.2	14
Lawn and Garden Equipment and Supplies Stores (NAICS 4442)	$634,871	$9,562,405	-$8,927,534	-87.5	4

Food & Beverage Stores (NAICS 445)	$33,637,118	$125,176,265	-$91,539,147	-57.6	13
Grocery Stores (NAICS 4451)	$31,963,230	$122,902,118	-$90,938,888	-58.7	5
Specialty Food Stores (NAICS 4452)	$1,048,202	$1,371,978	-$323,776	-13.4	6
Beer, Wine, and Liquor Stores (NAICS 4453)	$625,686	$902,169	-$276,483	-18.1	2
Health & Personal Care Stores (NAICS 446/NAICS 4461)	$1,600,426	$6,813,613	-$5,213,187	-62.0	9
Gasoline Stations (NAICS 447/NAICS 4471)	$30,781,410	$23,341,696	$7,439,714	13.7	6
Clothing and Clothing Accessories Stores (NAICS 448)	$4,761,383	$1,438,960	$3,322,423	53.6	8
Clothing Stores (NAICS 4481)	$4,084,042	$707,123	$3,376,919	70.5	6
Shoe Stores (NAICS 4482)	$367,426	$578,970	-$211,544	-22.4	1
Jewelry, Luggage, and Leather Goods Stores (NAICS 4483)	$309,915	$152,867	$157,048	33.9	1
Sporting Goods, Hobby, Book, and Music Stores (NAICS 451)	$1,575,263	$3,271,846	-$1,696,583	-35.0	11
Sporting Goods/Hobby/Musical Instrument Stores (NAICS 4511)	$1,029,252	$2,348,804	-$1,319,552	-39.1	8
Book, Periodical, and Music Stores (NAICS 4512)	$546,011	$923,042	-$377,031	-25.7	3



Neighborhood Market Potential - North Salt Lake Five Minute Drive Time Market Area

The following Market Area Retail classifications show a positive retail potential (the Demand exceeds the Supply (retail sales).

Neighborhood Shopping Market Area Industry Summary – Five Minute Drive Time	Demand (Retail Potential)	Supply (Retail Sales)	Retail Gap (Demand - Supply)	Surplus / Leakage Factor	Number of Businesses
General Merchandise Stores (NAICS 452)	$29,559,536	$16,292,134	$13,267,402	28.9	2
Department Stores Excluding Leased Depts. (NAICS 4521)	$22,159,920	$3,710,736	$18,449,184	71.3	1
Other General Merchandise Stores (NAICS 4529)	$7,399,616	$12,581,398	-$5,181,782	-25.9	1
Miscellaneous Store Retailers (NAICS 453)	$2,320,852	$3,235,111	-$914,259	-16.5	16
Florists (NAICS 4531)	$242,774	$90,643	$152,131	45.6	1
Office Supplies, Stationery, and Gift Stores (NAICS 4532)	$697,631	$1,717,944	-$1,020,313	-42.2	5
Used Merchandise Stores (NAICS 4533)	$272,003	$33,221	$238,782	78.2	1
Other Miscellaneous Store Retailers (NAICS 4539)	$1,108,444	$1,393,303	-$284,859	-11.4	9
Non-store Retailers (NAICS 454)	$21,128,481	$5,899,292	$15,229,189	56.3	6
Electronic Shopping and Mail-Order Houses (NAICS 4541)	$18,408,976	$2,953,482	$15,455,494	72.3	2
Vending Machine Operators (NAICS 4542)	$1,280,479	$604,955	$675,524	35.8	2
Direct Selling Establishments (NAICS 4543)	$1,439,026	$2,340,855	-$901,829	-23.9	2
Food Services & Drinking Places (NAICS 722)	$30,895,776	$14,649,306	$16,246,470	35.7	30
Full-Service Restaurants (NAICS 7221)	$15,071,734	$5,456,366	$9,615,368	46.8	16
Limited-Service Eating Places (NAICS 7222)	$11,963,460	$7,595,141	$4,368,319	22.3	11
Special Food Services (NAICS 7223)	$2,175,938	$1,207,654	$968,284	28.6	1
Drinking Places - Alcoholic Beverages (NAICS 7224)	$1,684,644	$390,145	$1,294,499	62.4	2

Source: Consumer Spending data are derived from the 2006 and 2007 Consumer Expenditure Surveys, Bureau of Labor Statistics. ESRI, *Bonneville Research 2011.*

Source: Consumer Spending data are derived from the 2006 and 2007 Consumer Expenditure Surveys, Bureau of Labor Statistics. ESRI and infoUSA®, *Bonneville Research 2011.*

Data Note: Supply (retail sales) estimates sales to consumers by establishments. Sales to businesses are excluded. Demand (retail potential) estimates the expected amount spent by consumers at retail establishments. Supply and demand estimates are in current dollars. The Leakage/Surplus Factor presents a snapshot of retail opportunity. This is a measure of the relationship between supply and demand that ranges from +100 (total leakage) to -100 (total surplus). A positive value represents 'leakage' of retail opportunity outside the trade area. A negative value represents a surplus of retail sales, a market where customers are drawn in from outside the trade area. The Retail Gap represents the difference between Retail Potential and Retail Sales. ESRI uses the North American Industry Classification System (NAICS) to classify businesses by their primary type of economic activity. Retail establishments are classified into 27 industry groups in the Retail Trade sector, as well as four industry groups within the Food Services & Drinking Establishments subsector

Summary Neighborhood Shopping (5 min drive time)		Demand	Supply	GA
Department Stores	$22,159,920	$3,710,736	$18,449,184	
Food Services & Drinking Places	$30,895,776	$14,649,306	$16,246,470	
Electronic Shopping and Mail-Order	$18,408,976	$2,953,482	$15,455,494	
Non-store Retailers	$21,128,481	$5,899,292	$15,229,18	
General Merchandise Stores	$29,559,536	$16,292,134	$13,267,402	
Full-Service Restaurants	$15,071,734	$5,456,366	$9,615,368	
Limited-Service Eating Places	$11,963,460	$7,595,141	$4,368,319	
Drinking Places - Alcoholic Beverages	$1,684,644	$390,145	$1,294,499	
Special Food Services	$2,175,938	$1,207,654	$968,284	

Vending Machine Operators	$1,280,479	$604,955	$675,524
Used Merchandise Stores	$272,003	$33,221	$238,782
Florists	$242,774	$90,643	$152,131

Translating that retail demand gap into the number of potential retail stores is the next challenge.

The North Salt Lake Town Center Retail Mix

Bonneville Research estimates the potential capture rate of each individual store (there will always be some leakage due to travel, internet, mail-order, and other sales. Using sales per square foot estimates from ICSC and information on typical store sizes the number of potential new retail stores and the retail mix is then estimated.

Neighborhood Shopping Market Area Industry Summary – Five Minute Drive Time - 2010	North Salt Lake Marketplace Retail Potential	Potential Capture Rate	Sales per Sq Ft (ICSC)	Potential Store Size	Typical Store Size	# Potential Retail Stores
Department Stores	$18,449,184	50%	650	14,192	90,000	0
Food Services & Drinking Places	$16,246,470	30%	550	8,862	4,500	2
Electronic Shopping and Mail-Order	$15,455,494	10%	950	1,627	1,500	1
Non-store Retailers	$15,229,189	10%	950	1,603	1,500	1
General Merchandise Stores	$13,267,402	15%	850	2,341	90,000	0
Full-Service Restaurants	$9,615,368	15%	650	2,219	6,500	0
Limited-Service Eating Places	$4,368,319	20%	650	1,344	4,500	0
Drinking Places - Alcoholic Beverages	$1,294,499	10%	650	199	4,500	0
Special Food Services	$968,284	10%	650	149	2,500	0
Vending Machine Operators	$675,524	10%	$650	104	3,500	0
Used Merchandise Stores	$238,782	20%	$425	112	3,500	0
Florists	$152,131	70%	$550	194	1,500	0

Source: ESRI, ICSC, *Bonneville Research 2011.*

3. Summary of Neighborhood Market Potential Findings – North Salt Lake Town Center Marketplace Retail Mix - 2010.

Who could or should be establishing a business in the North Salt Lake Town Center?

- Food and Drink - At least two stores/restaurants/Café/Bars of approximately 4,500 sq ft

Establishing a business in the North Salt Lake Town Center

Why would someone want to establish a business in the North Salt Lake Town Center?

Locating a business is a big step and North Salt Lake needs to spend a lot of time providing information to potential business on the opportunities and advantages of locating in the Town Center. A business owner will choose to locate in the Town Center because they think they can make more money there than other available sites. It is incumbent on North Salt Lake to be able to demonstrate clearly that the product or service the entrepreneur is contemplating will be more successful by choosing to locate in the North Salt Lake Town Center because:

The North Salt Lake Town Center area is:

- Different from what they will experience from anyone else,
- Different from what they already have, and
- Something that their customers will value and seek out.

Some of the support activities necessary might include the following:

- Advice on business options and opportunities
- Business skills training
- Business planning support
- Start-up funding
- Ongoing support from a mentor
- Access to a wide range of free and discounted products and services.

What is keeping them from establishing a business in the Town Center?

Off Street Parking

One of the issues that seemed to be voiced frequently during the Charrette process was the lack of off-street parking in the Town Center. Bonneville Research therefore has prepared estimates the likely off street parking required for each individual store that likely may be supported in the Town Center.
Because of the limited availability of public transportation in North Salt Lake, no allowance was made for shoppers that use

other transportation than a vehicle. Using parking standard of 3 stalls per 1,000 sq ft of retail space estimates for the number of potential new retail stores and the retail mix is then derived.

North Salt Lake Town Center Marketplace Retail Parking Requirements - 2010

North Salt Lake Marketplace Total Retail Expenditures - 2010	Potential Store Size	Parking Standard @ 3 per 1,000 sq ft	Parking Requirements
Department Stores	14,192	0.003	43
Food Services & Drinking Places	8,862	0.003	27
Electronic Shopping and Mail-Order	1,627	0.003	5
Non-store Retailers	1,603	0.003	5
General Merchandise Stores	2,341	0.003	7
Full-Service Restaurants	2,219	0.003	7
Limited-Service Eating Places	1,344	0.003	4
Drinking Places - Alcoholic Beverages	199	0.003	1
Special Food Services	149	0.003	0
Vending Machine Operators	104	0.003	0
Used Merchandise Stores	112	0.003	0
Florists	194	0.003	1

Source: ESRI, ICSC, *Bonneville Research 2011.*

Strategies for Encouraging Business Developments in the North Salt Lake Town Center Residential Development

In order to maximize the value of the "North Salt Lake Town Center" brand and to support residential growth, the Town Center needs to create a special critical-mass district of unique residential living units, retail shops and dining venues, supported by events that carry out the brand's theme.

Whether participating in family outings or engaging in free time activities, residents and visitors want an experience.

Revitalizing the historic North Salt Lake Town Center core into an entertainment district will fulfill that need much better than shopping at the mall or eating at a roadside, chain restaurant.

The top priority should be creation of a Town Center residential district.

Town Center Retail Development

A second priority should be creation of a Town Center dining/entertainment district. Visitors prefer a dining experience, not just eating out. They like a single location restaurant run by the owners with outside dining and signature dishes. Unique retail shops with artisans in residence for the parents and shops for the kids; family events with music and dancing or light recreation all add to the setting. Special Town Center events add to the vitality of the Town Center, for example, classic car shows, or heritage events. We recommend the recruitment of outside event organizers to promote and stage Town Center events.

Creating an entertainment district component to the Town Center with a new mix of shops, restaurants, event and performance venues, loft living spaces and resident services is just as important for the residents of North Salt Lake Town Center as it is for the visitors. Visitors do not like to hang out where residents are not present, and the citizens of the greater community deserve to have an animated, exciting place to hang out, meet their friends and be entertained. Other than its people, the heart and soul of any community is its Town Center.

This all adds up to the strong foundation for creating a pedestrian-oriented shopping and dining district that will lure residents and visitors alike. Local household incomes have been rising much faster than inflation. This increased income and demand for retail - especially restaurants, will support a revitalized Town Center.

One of the most important factors influencing a visitor's decision about a destination is convenience. This begins with the ease of planning the trip and extends through the actual experience.

With the North Salt Lake Town Center, the brand needs to be supported by amenities that make the visitor's experience easy and enjoyable. This would include:

- New signage and way finding

- Visitor information/Historical Notes kiosks
- Town Center Wi-Fi
- Convenient parking
- Convenient public restrooms

The forces that have led to this transformation include changing market demands, shifting public policy, new urban design ideas, creative financing solutions, and cultural changes that are occurring as the tastes and attitudes of the Depression-era generation yield to those of baby-boomers, echo boomers, and beyond. This applies to their "quest for community," and creation of gathering places.

The elements most commonly identified as missing by younger generations are what sociologist Ray Oldenburg has referred to as "third places."

> *Third places are the traditional gathering places found outside the home (our "first place") and the workplace (our "second place"). Third places include cafes, pubs, town squares, small retail shops, village greens, and entertainment venues.*

The need for these "third places" is exemplified by the Gen-xers hanging out at the mall and seniors using them for morning walks. Creating a "third place" can put a community on the map and give it a focal point, a heart, and identity. After all, besides its people, the heart and soul of any community is its Center.

Can a redeveloped Town Center compete with existing shopping malls and big box stores? The challenge for the North Salt Lake Town Center is to not compete, but be unique and special.

For the North Salt Lake, what needs to be developed is a Town Center that does not revolve around neighborhood retail, but is instead driven by destination retail, entertainment, events, and an active nightlife all located in a compact, intimate, and beautifully landscaped setting – a true gathering place. A true gathering place is a place where local residents feel safe; a place where visitors have a variety of dining and shopping options; and a place where everyone can congregate after business hours for dining and entertainment.

Successful Town Centers will only succeed, if they follow the same principles used by the best major lifestyle retail developers to satisfy consumer demands:

- Great storefront design with exciting visual appeal (exterior displays, beautification, alcoves, etc.)

- Traffic patterns that guide people to stores
- Strategic tenant mix
- Inviting, clean, beautiful, and secure shopping environment
- Ample and convenient parking
- Regular and generous shopping hours
- High-quality marketing, advertising, and management

What brings people back is the authentic and casual public setting, which a town center provides for meeting, mingling, strolling, and people watching. What fuels the commercial success of a town center is the right mix of tenants, customers, and foot traffic.

The other component of a successful Town Center redevelopment project revolves around experiences.

Experiential draws can be theater, artists in action (art studios, arts incubators), street vendors and entertainers, farmers' markets, and thematic restaurants and retail shops. The recommendations made in this plan will achieve these goals, but patience is required. The average revitalization program takes 10 to 30 years to complete.

The following are the primary infrastructure-related recommendations:

- Creating and identifying off-street parking
- Widening sidewalks
- Planting trees
- Constructing restrooms
- Creating performing arts venues
- Changing street directions
- Applying architectural standards
- Acquiring public art
- Offering free Wi-Fi
- Attracting new businesses with reduced rent and other concessions.

North Salt Lake currently lacks a destination with a mix of retail sufficient to attract locals or to satisfy the expectations of overnight visitors. Tourists will not go where locals are not present, so it is important to make sure residents are active, engaged, and highly visible. How many times have you looked for a place to stop and eat in an unfamiliar town, only to pass by several fine-looking restaurants just because there didn't appear to be many locals inside?

As lease agreements are negotiated, property owners should seek to reach agreements with retailers on specific, consistent business operating hours, including evenings and weekends. It is important to make sure that businesses are open seven days a week and during evening hours. There are a number of programs designed to assist retailers in covering the personnel costs of remaining open for extended hours. One is a job-share program, where part-time workers move from business to business to cover lunch hours and errands.

Even having the right mix of businesses a Town Center will fail, if they are closed during evening hours, events, or haven't created a bustling and vibrant gathering place. In all the cities we have researched, this was not a major problem. People are moving back into centers like never before. This move is being fueled by a baby-boom generation looking to retire, down-size, yet have access to urban amenities and entertainment. These people expect a very high quality residential living environment. Loft apartments and condos are bringing centers back to life across the country.

Demographic and Economic NOTES:

Below are the principal, accessory, and conditional uses permitted in this plan, and uses that are not permitted.

Principal Uses:

- Retail businesses
- Personal service establishments
- Banks and financial institutions on the ground floor, so long as any drive-through window does not have access or egress directly onto North Salt Lake Avenue, is well buffered from adjacent residential areas, and incorporates proper traffic circulation and signage controls
- Food consumption establishments (except drive-in or carry out restaurants)
- Package stores and taverns
- Artist studios and artistic instruction space on all floors except for the ground, street level floor
- Business, professional and governmental offices located above commercial uses, not occupying the ground floor other than "retail or customer service functions" like Post Offices, Auto Registration, etc.
- Residential uses not occupying the ground floor, and which may be located on the same floor with other permitted uses

- Public assembly facilities and spaces, theaters and cinemas, where the use is integrated into mixed-use buildings with retail frontage along North Salt Lake Avenue
- Medical professional offices on the ground floor, provided they do not occupy more than 50% of the total ground floor of a building, do not face North Salt Lake Avenue and do not displace or preclude retail frontage along North Salt Lake Avenue.
- Off-street parking and loading spaces
- Fences, walls and hedges
- Satellite dish antenna (receive only)
- Outdoor cafes including temporary outdoor dining on the public sidewalk as long as it does not inhibit pedestrian traffic.
- Sidewalk displays
- Artist studios and artistic instruction space that are accessory to art galleries, art supplies stores and other arts-related retail uses, provided they do not occupy more than 33% of the total area of the ground floor and provided that all windows facing North Salt Lake Avenue or any side street are maintained with a retail display focus
- Public utility facilities required to provide direct service of the utility to the consumers such as transformers and pumping stations, but not warehouses, service or storage and treatment yards

The following uses are expressly prohibited in the North Salt Lake Town Center zone:

Except as otherwise expressly permitted, used and new automobile and truck dealerships and rental agencies thereof.

- "Carry-out" restaurants.
- Any industrial process, manufacture, assembly or treatment.
- Automobile service stations, repair shops and car washes.
- Lumber, fuel and building material storage works and lawn and garden shops over 10,000 sq ft.
- Wholesale laundries, dyeing and cleaning works.
- Arcades and amusement centers where more than ten percent (10%) of the retail floor area is devoted to such use.
- Any process or storage use that may be noxious or injurious by reason of the production or emission of dust, smoke, refuse matter, gas fumes, noise, vibration or similar substances or conditions.

- Billboards or signs painted or mounted upon the exterior side or rear walls of any principal or accessory building or structure and/or freestanding signs.
- All residential, service, commercial or industrial uses not specifically permitted in this zone.
- Except as expressly set forth herein, Automobile "drive-in" or "drive-through" features in connection with any food sales, restaurant, bank or any other food, personal service or business establishment of any kind.
- Adult bookstores and amusement facilities.
- Any exterior storage of goods and materials.

Parking

- A 50% shared parking allowance will be made for combining weekday uses with evening/weekend uses in the same building. Office and general retail uses are considered to be weekday uses, while residential and restaurant uses are considered to be evening/weekend uses. 50% of the parking requirement of the evening/weekend use of the building may be met through parking provided for the weekday use.
- Parking shall not be constructed between buildings and North Salt Lake Avenue, or otherwise fronting North Salt Lake Avenue.
- The primary access points to parking lots and facilities shall be from streets other than North Salt Lake Avenue. Curb cuts across sidewalks along North Salt Lake Avenue are discouraged and shall in no instance exceed one per block (or, if only part of the North Salt Lake Avenue edge of a block is included in the redevelopment area, one per such portion), located centrally to the block face.

Our interviews with the North Salt Lake community and the Charrette processes show that even before the current economic downturn, retail functions in North Salt Lake have been suffering. Vacancies and low-quality retail uses have negatively affected the perceived quality of life, sense of safety and local pride. North Salt Lake civic leaders have responded by constructing the North Salt Lake city Hall in the Town Center Area.

Shifts away from retail is often incremental, when individual units get new, non-retail uses such as for office space or even residential accommodation. Public policy often responds by consolidate and attempts to regenerate the retail offering. There may be cases

however where this may not be possible or even desirable. Adding housing helps to support retail thresholds, but in many cases this will not be sufficient to change the structural trends that underpin long-term retail change. Nor is it realistic to assume that local residents will necessarily support local services.

Strategies for Town Center retail redevelopment generally:

- Attempt to enable imaginative thinking about alternatives such as affordable workspace, adaptable building typologies, social infrastructure or the creation of attractive new residential environments;
- Seek small scale additions and upgrading of individual buildings seeking to revive the character and identity of the retail stock and add residential accommodations;
- Incentivize a new employment, by encouraging needed additional investment, such as in retrofitting of retail centers for affordable employment space.

It is worth considering alternative strategies and tools for those ex-retail spaces to create attractive transformation options. If long-term changes in the operation of the retail market are negatively affecting Town Centers, conceptualizing them as primarily retail-driven places can impede innovative solutions, whereas other Town Center functions (leisure, local services, meeting places, employment space) might offer equal or more potential. There are cases where a more proactive planning approach could actively seek for such alternatives, and acknowledge an ensuing change in the retail hierarchy in planning policy.

Potential barriers in policy should be removed by a review and reconsideration of the role of the Town Center to see if requirements for retail space, associated parking, transportation impact fees, and the maintaining of retail frontages can be reduced. Such an approach needs to be based on detailed analysis reflecting the policies and aspirations of the North Salt Lake Town Center as well as changing trends and emerging opportunities on the ground.

Strengthen the North Salt Lake Town Center

Because of North Salt Lake's historical growth pattern, there is not always a clear structure of a nodal Center with clearly defined edges. Instead, it is the edge condition itself that is ubiquitous. Different

former 'commercial areas' have gradually merged, especially along main thoroughfares which often had retail, manufacturing, showrooms and various other commercial uses. This 'transition zone' is the primary site for redevelopment because of retail decline. Intensification often takes places at such edges as low-density lower-value land-uses get replaced by residential development. However the process usually happens in an unplanned manner, through incremental, developer driven projects. Too often, this leads to low quality development with little added value for the locality. It is such small-scale projects that give 'intensification' it's bad name. It is seen to erode local character and, by failing to provide for new public spaces and social infrastructure. Moreover the distinction between the Center and surrounding suburban areas gets blurred, while the transition to suburban streets is often badly designed.

Our experience in other communities dealing with the transition between Town Centers and more suburban streets show that:

- A strategy can be to accept contraction of retail functions and to invest in alternative uses instead, such as social infrastructure (schools, health or sports facilities, community services) or well-planned workspaces where there is demand. Investing in non-use specific loft buildings with generous ceiling heights could be one way to create an adaptable Town Center edge that can respond to changing economic needs and uses;
- Residential developments must be attractive for families with children or elderly people. The challenges are to create good residential ground floors, to manage the transition to suburban side streets, and imaginatively design;
- Development of small new public spaces which become civic gathering points beyond the retail shopping cores. This includes deliberate strategies for greenery, since loss of green character through edge of Town Center development is often cause for local concern.

This suggests that the edges of Town Centers would profit from more proactive planning and design strategies so that these locations are strengthened, with existing qualities maintained and new qualities added. This is not about fixing or freezing those edges once and for all – the urban process is dynamic and the role of such locations may shift over time. The challenge is to create strategies that reflect the character of these edge areas and encourage a positive intensification process that is open to changing needs.

Improvements to social infrastructure such as playgrounds, schools, health facilities and public space investments are an important way to generate tangible 'public value' from the intensification process.

At the moment new residential development and intensification through residential conversions are often associated with adding pressure on existing services rather than their improvement. But it is possible to integrate social infrastructure into the very heart of residential development projects, in conjunction with public space improvements. An increase in numbers of residents can actually improve service levels by helping to sustain or expand the critical mass needed for social infrastructure investment. Integrating social infrastructure provision in the housing intensification process show that:

- strategic use of social infrastructure such as health or sports facilities or schools can be the backbone of regeneration projects, enhancing the public realm in ways that enable increased new housing development – this may include provision for certain target groups such as large families or the elderly;
- this can be the driver to reposition areas on mental maps of North Salt Lake residents and visitors by tapping into emerging lifestyle trends such as the active outdoor leisure economy;
- this requires typologies, designs and strategies that successfully integrate e.g. education, sports and health provision in comprehensive urban design and architectural projects.

This suggests that more daring combinations of social infrastructure with residential accommodation

are technically possible and potentially beneficial. Investments in social infrastructure, whether for community facilities or other public projects need to be linked in the planning and design process, and funding models to further developed to maximize potential in the light of changing economic circumstances. This requires very proactive planning process by municipal and regional planning and economic development authorities.

Barriers to increasing density in North Salt Lake

Even before the current slow-down in building rates, there were concerns about whether the planning system and the development sector would be able to achieve long-term housing growth in line with the ambitions set in targets – both nationally and in North Salt Lake. A range of factors were considered:

- ***An existing low density***. North Salt Lake's existing downtown density is generally a lower to moderate density typical of suburban communities. This sets a baseline against which the planning and development systems may be influenced by public sentiment as they assess proposals for higher density housing or mixed use development. Public opinion may be prejudiced against higher density levels may influence planning applications.
- ***Laissez-Faire planning control.*** The property owner driven and laissez-faire approach to development decision making, may clash with a more pro-active public sector driven approach to plan-making and project delivery.
- ***Affordable housing provisions.*** The delivery of affordable housing is often tied to the development of private sector housing, where a proportion of affordable housing is usually required subject to a range of conditions. This is often seen to drive down the viability of new projects. New delivery vehicles for affordable housing in which Local Authorities themselves can take the lead in delivery, may be required.
- ***Competing land-uses and adjacency effects.*** Planning policies include provisions on land use such as Town Center retail or industrial activities. Their underlying assumption is that Town Centers and employment zones play an important role for their local communities, and policy aims to protect and enhance this role. This can prevent some sites from being redeveloped for moderate or higher density housing. In protected employment areas, this might be exacerbated if adjacency effects, such as noise, dust or visual amenity, prevent good quality residential development outside the actual protected area.
- ***Heritage.*** The Town Center area has buildings or areas of historical value which are locally cherished for their contribution to local character and identity. These may or may not be protected through an historical listing designation. Whereas heritage ought to be seen as a

positive ingredient of future area change, sometimes it is unnecessarily seen to cast a policy shadow on surrounding properties, which can be inhibit new development.

- ***Land assembly issues.*** Highway 89 is characterized by multiple, fragmented and irregular property ownerships. Assembly among multiple private sector partners is often required to create viable redevelopment sites and the ability to achieve higher density housing development may be limited.

This study contributes to this discussion by an evaluation of the scenarios and analysis of the obstacles to delivering different housing typologies identified in the study.

Parking Lots

The provision of parking is necessary for the commercial district. However, the placement and quantity of parking impact on the sustainability and walk ability of North Salt Lake. The following guidelines describe the location and design of parking facilities, and encourage use of shared parking facilities.

- Shared parking is parking which is available to more than one building or land use. In general, different types of land uses may create different demands for parking throughout the day. For example, restaurants may require more parking in evenings while office buildings need parking during the day. To prevent the wasteful duplication of parking facilities that could serve more than one group of users, shared parking is encouraged. When compatible land uses are within 700' of each other, parking may be shared, reducing the amount of parking required for each land use and cost for development.
- In general, the preferred location of parking is below or behind buildings.
- Parking lots are required to have clear pedestrian access routes within them and to North Salt Lake Avenue. Pass-through walkways, those connecting parking located behind buildings to the sidewalk, shall be provided to rear parking lots and to pedestrian walks leading to surrounding residential districts. These walks shall have clear signs and markings for orientation and a high degree of passive surveillance, overlooking windows, and adequate lighting for security.

- For office development 25,000 square feet or more, preferred parking shall be provided for carpools/vanpools serving building occupants. (For more information see LEED® Sustainable Sites credit 4.)
- For residential development, secure, sheltered bike parking shall be provided for residents.
- In order to facilitate bicycle commuting, secure bicycle storage shall be provided at all buildings for at least 15% of building occupants.
- Parking lots shall be landscaped with trees to provide shade with one tree for every three parking spaces.
- Subdivide surface parking lots into smaller areas through the use of landscaping and other visual elements. Landscaping shall be hardy and able to withstand soot and gas fumes.
- Landscaping shall be designed to remove contaminants from and encourage infiltration of stormwater runoff according to stormwater BMPs (Best Management Practices), for example, curbs surrounding landscaped areas should be perforated and graded to drain water into the planted areas for filtration.
- Redwood Road Area

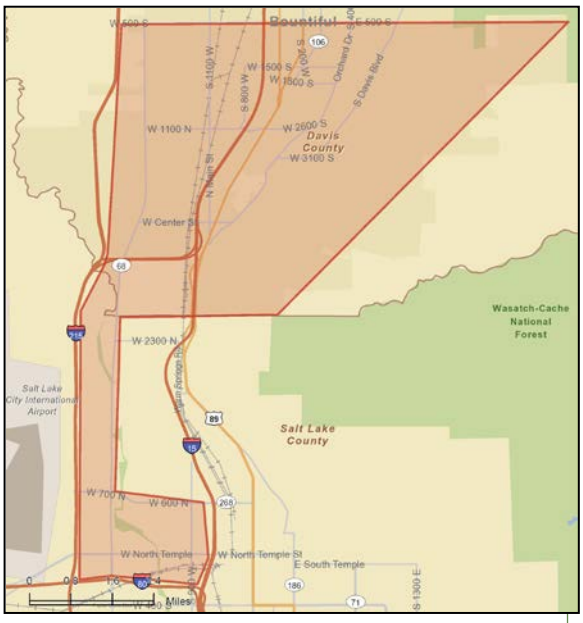
Information is presented in two sections:

- Section one looks at the Redwood Road Market Area and presents key economic and demographic information for 2010 and projects key data to 2015.
- Section two examines the Redwood Road market potential and seeks to answer the following key questions:
  - What is the market potential of the North Salt Lake Redwood Road Market Area?
  - What types of retail businesses may be supported?
  - How large could those retail businesses be?

Redwood Road Market Potential

The following commercial market opportunities for the Redwood Road Market Area are defined by:

- Demand - the number of consumers in the defined market area, the income, family size and purchasing characteristics of those potential customers.
- Supply - the current retail sales within the Redwood Road Market Area market area within those categories.



- Gap - the difference between Demand and Supply. Can be a positive number (opportunity for new retail expansion) or negative (possible current retail oversupply).

The following commercial market area is defined by the following general customer shopping patterns. For example:

- The North Salt Lake Redwood Road Market Area was custom drawn based upon known traffic patterns and spacing of other general discount retailers.

A Primary Market Area is the area from which 60-80% of the center's sales originate

1. Demographic and Economic Analysis

Regional Shopping Primary Market Area Demographic Summary

Regional center: Provides shopping goods, general merchandise, apparel, furniture and home furnishings in full depth and variety. It is built around the full-line department store, with a minimum GLA of 100,000 square feet, as the major drawing power. For even greater comparative shopping, two, three or more department stores may be included. In theory a regional center has a GLA of 400,000 square feet, and can range from 300,000 to more than 1,000,000 square feet.

Regional centers in excess of 750,000 square feet GLA with three or more department stores are considered super regional centers.

The market areas is predominately owner occupied family households.

Year	2000	2010	2015
Population	60,722	70,463	76,432
Households	18,769	22,007	24,026
Families	14,846	16,899	18,208
Average Household Size	3.21	3.18	3.16
Owner Occupied Housing Units	13,461	15,566	17,053
Renter Occupied Housing Units	5,308	6,440	6,973
Median Age	28.5	30.2	30.9

Source: U.S. Bureau of the Census, 2000 Census of Population and Housing. ESRI BIS forecasts for 2010 and 2015, Bonneville Research 2011.

Eighty (80%) percent of the households in the market area have annual incomes of $35,000 or greater.

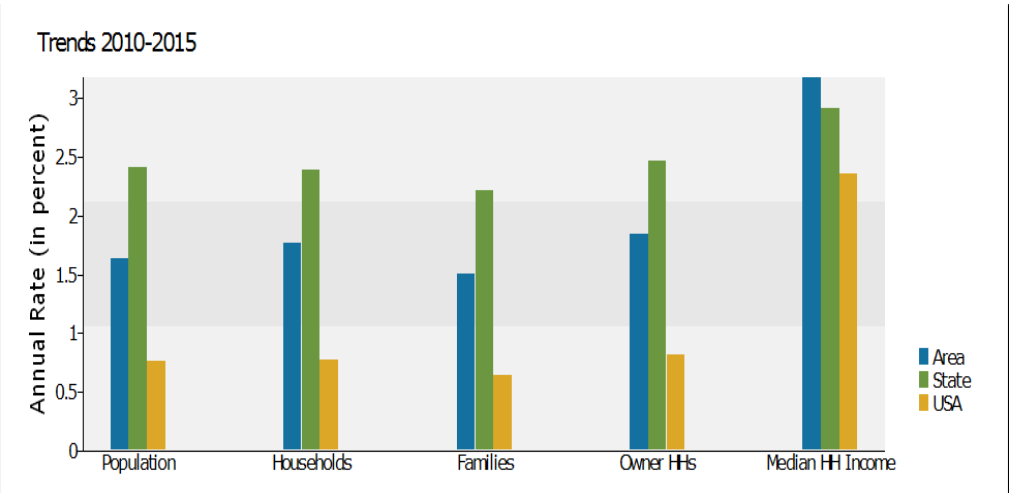
Redwood Road Market Area Demographic Summary	2000		2010		2015	
	Number	Percent	Number	Percent	Number	Percent
<$15,000	1,507	8.1%	1,194	5.4%	980	4.1%
$15,000 - $24,999	2,330	12.5%	1,449	6.6%	1,157	4.8%
$25,000 - $34,999	2,301	12.3%	1,766	8.0%	1,326	5.5%
$35,000 - $49,999	3,160	16.9%	3,116	14.2%	2,047	8.5%
$50,000 - $74,999	4,351	23.3%	5,199	23.6%	6,136	25.5%
$75,000 - $99,999	2,265	12.1%	3,708	16.9%	3,926	16.3%
$100,000 - $149,999	1,673	9.0%	3,427	15.6%	5,006	20.8%
$150,000 - $199,999	583	3.1%	1,071	4.9%	1,950	8.1%
$200,000+	518	2.8%	1,076	4.9%	1,498	6.2%

Source: U.S. Bureau of the Census, 2000 Census of Population and Housing. ESRI BIS forecasts for 2010 and 2015, Bonneville Research 2011.

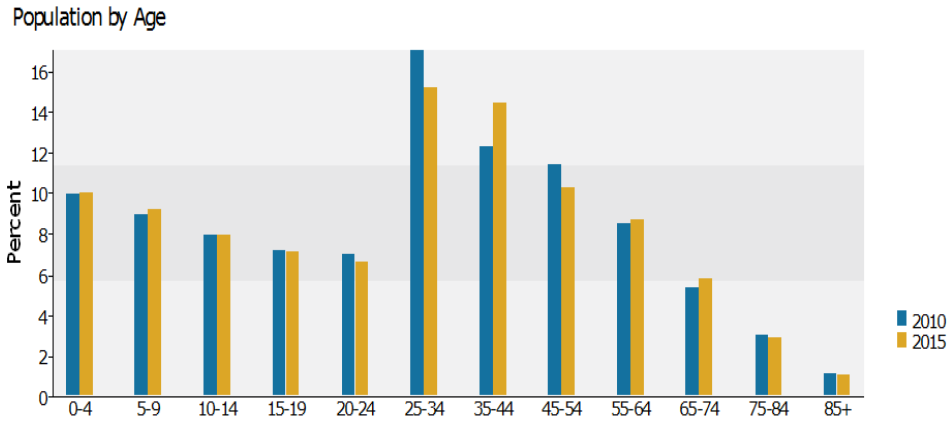
Average household income in the Redwood Road Market Area is almost $80,000 and the 2009 median disposable income is $52,638.

Redwood Road Market Area Demographic Summary	2000	2010	2015
Median Household Income	$50,183	$65,619	$76,722
Average Household Income	$63,912	$82,577	$96,331
Per Capita Income	$19,950	$25,821	$30,292

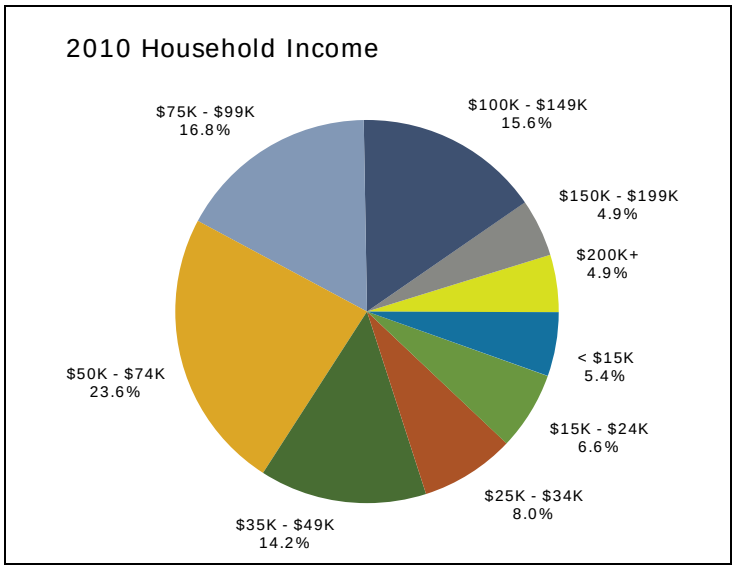
Source: U.S. Bureau of the Census, 2000 Census of Population and Housing. ESRI BIS forecasts for 2010 and 2015, Bonneville Research 2011.



Source: U.S. Bureau of the Census, 2000 Census of Population and Housing. ESRI BIS forecasts for 2010 and 2015, Bonneville Research 2011.



Source: U.S. Bureau of the Census, 2000 Census of Population and Housing. ESRI BIS forecasts for 2010 and 2015, Bonneville Research 2011.



Source: U.S. Bureau of the Census, 2000 Census of Population and Housing. ESRI BIS forecasts for 2010 and 2015, Bonneville Research 2011.

Summary of Demographic and Economic Findings –Redwood Road Market Area:

- The Redwood Road Market Area has over 70,000 residents.
- The Redwood Road Market Area has excellent income, age and other demographics.
- The growth trends in the market area are excellent.
- The Redwood Road Market Area is predominately owner occupied family households.
- Eighty (80%) percent of the households in the market area have annual incomes of $75,000 or greater.
- Average household income in the Redwood Road Market Area is over $82,000 and the *2009 median disposable income is excellent at $52,638.*
- The Redwood Road Market Area is growing faster than the country as a whole.

2. Redwood Road Market Area Retail Potential Summary

North Salt Lake Redwood Road Market Potential

The commercial market demand for the North Salt Lake Redwood Road Market Area is defined by the number of consumers in the defined market area, the income, family size and purchasing characteristics of those potential customers. The following chart presents the retail potential analysis for the five minute - Neighborhood shopping primary market area for The North Salt Lake Redwood Road.

Section two examines the key North Salt Lake Redwood Road market potential and seeks to answer the following key questions:

- What is the market potential of the Redwood Road Market Area?
- What types of stores and how big might they be?

Consumer Spending - Redwood Road Market Area

Consumer Spending shows the amount spent on a variety of goods and services by households that reside in the market area. Expenditures are shown by broad budget categories that are not mutually exclusive. Consumer spending does not equal business revenue.

Redwood Road Market Area Market Area Consumer Spending	
Apparel & Services: Total $	$44,205,175
Average Spent	$2,008.69
Spending Potential Index	84
Computers & Accessories: Total $	$5,897,450
Average Spent	$267.98
Spending Potential Index	122
Education: Total $	$32,317,383
Average Spent	$1,468.50
Spending Potential Index	120
Entertainment/Recreation: Total $	$85,187,036
Average Spent	$3,870.91
Spending Potential Index	120
Food at Home: Total $	$115,256,520
Average Spent	$5,237.27
Spending Potential Index	117
Food Away from Home: Total $	$84,912,768
Average Spent	$3,858.44
Spending Potential Index	120
Health Care: Total $	$91,966,809
Average Spent	$4,178.98
Spending Potential Index	112
Household Furnishings & Equip: Total $	$47,753,065
Average Spent	$2,169.90
Spending Potential Index	105
Investments: Total $	$41,899,322
Average Spent	$1,903.91
Spending Potential Index	109
Retail Goods: Total $	$619,041,311
Average Spent	$28,129.29
Spending Potential Index	113
Shelter: Total $	$424,248,290
Average Spent	$19,277.88
Spending Potential Index	122
TV/Video/Audio: Total $	$31,995,263
Average Spent	$1,453.87
Spending Potential Index	117
Travel: Total $	$50,247,043
Average Spent	$2,283.23
Spending Potential Index	121
Vehicle Maintenance & Repairs: Total $	$24,640,928
Average Spent	$1,119.69

	Spending Potential Index	119

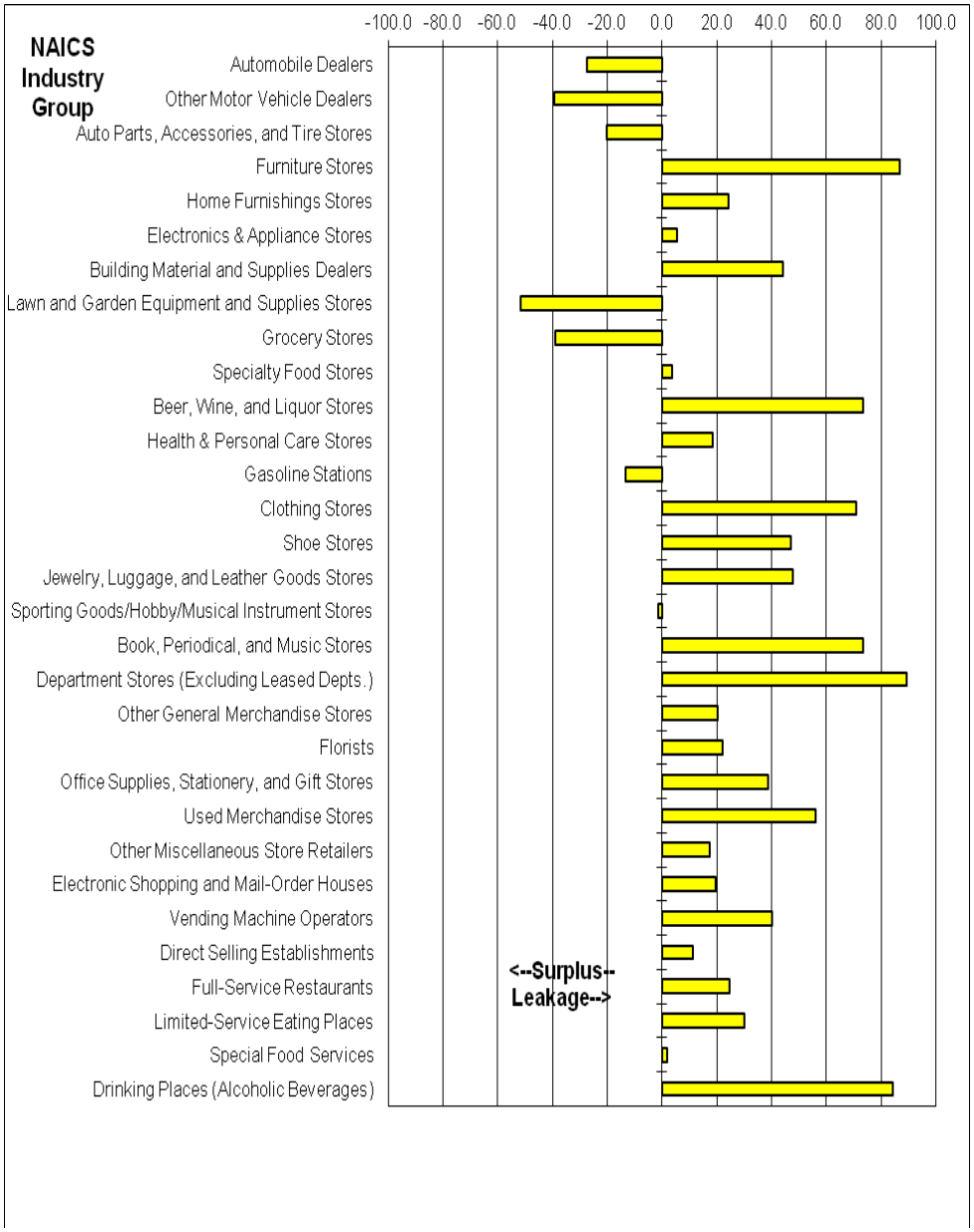
Source: Consumer Spending data are derived from the 2006 and 2007 Consumer Expenditure Surveys, Bureau of Labor Statistics. ESRI, *Bonneville Research 2011.*
Data Note: The Spending Potential Index represents the amount spent in the area relative to a national average of 100.

Redwood Road Area Market Potential

The Redwood Road Market Area Retail Potential shows the Supply (retail sales) estimates sales to consumers by establishments. Sales to businesses are excluded. Demand (retail potential) estimates the expected amount spent by consumers at retail establishments. Supply and demand estimates are in current dollars. The Leakage/Surplus Factor presents a snapshot of retail opportunity. This is a measure of the relationship between supply and demand that ranges from +100 (total leakage) to -100 (total surplus). A positive value represents 'leakage' of retail opportunity outside the trade area. A negative value represents a surplus of retail sales, a market where customers are drawn in from outside the trade area. The Retail Gap represents the difference between Retail Potential and Retail Sales. North American Industry Classification System (NAICS) is used to classify businesses by their primary type of economic activity. Retail establishments are classified into 27 industry groups in the Retail Trade sector, as well as four industry groups within the Food Services & Drinking Establishments subsector.

Redwood Road Market Area Industry Group	Demand (Retail Potential)	Supply (Retail Sales)	Retail Gap (Demand - Supply)	Surplus / Leakage Factor	Number of Businesses
General Merchandise Stores (NAICS 452)	$91,563,431	$38,107,021	$53,456,410	41.2	14
Department Stores Excluding Leased Depts. (NAICS 4521)	$37,156,522	$2,082,243	$35,074,279	89.4	4
Other General Merchandise Stores (NAICS 4529)	$54,406,909	$36,024,778	$18,382,131	20.3	10

Miscellaneous Store Retailers (NAICS 453)	$10,890,334	$6,198,703	$4,691,631	27.5	34
Florists (NAICS 4531)	$692,611	$443,361	$249,250	21.9	7
Office Supplies, Stationery, and Gift Stores (NAICS 4532)	$4,718,848	$2,082,994	$2,635,854	38.8	6
Used Merchandise Stores (NAICS 4533)	$406,088	$114,210	$291,878	56.1	3
Other Miscellaneous Store Retailers (NAICS 4539)	$5,072,787	$3,558,138	$1,514,649	17.5	18
Non-store Retailers (NAICS 454)	$20,758,160	$14,850,053	$5,908,107	16.6	6
Electronic Shopping and Mail-Order Houses (NAICS 4541)	$7,279,576	$4,914,063	$2,365,513	19.4	3
Vending Machine Operators (NAICS 4542)	$2,203,604	$944,068	$1,259,536	40.0	1
Direct Selling Establishments (NAICS 4543)	$11,274,980	$8,991,922	$2,283,058	11.3	2
Food Services & Drinking Places (NAICS 722)	$97,277,585	$53,125,165	$44,152,420	29.4	97
Full-Service Restaurants (NAICS 7221)	$37,536,470	$22,680,041	$14,856,429	24.7	52
Limited-Service Eating Places (NAICS 7222)	$51,737,348	$27,790,963	$23,946,385	30.1	39
Special Food Services (NAICS 7223)	$2,244,399	$2,156,179	$88,220	2.0	2
Drinking Places - Alcoholic Beverages (NAICS 7224)	$5,759,368	$497,982	$5,261,386	84.1	4



Source: Consumer Spending data are derived from the 2006 and 2007 Consumer Expenditure Surveys, Bureau of Labor Statistics. ESRI and infoUSA®, *Bonneville Research 2011.*

Data Note: Supply (retail sales) estimates sales to consumers by establishments. Sales to businesses are excluded. Demand (retail potential) estimates the expected amount spent by consumers at retail establishments. Supply and demand estimates are in current dollars. The Leakage/Surplus Factor presents a snapshot of retail opportunity. This is a measure of the relationship between supply and demand that ranges from +100 (total leakage) to -100 (total surplus). A positive value represents 'leakage' of retail opportunity outside the trade area. A negative value represents a surplus of retail sales, a market where customers

are drawn in from outside the trade area. The Retail Gap represents the difference between Retail Potential and Retail Sales. ESRI uses the North American Industry Classification System (NAICS) to classify businesses by their primary type of economic activity. Retail establishments are classified into 27 industry groups in the Retail Trade sector, as well as four industry groups within the Food Services & Drinking Establishments subsector

Summary The Redwood Road Area Shopping Potential

The Redwood Road Shopping Market Area Industry Summary	**North Salt Lake Marketplace Retail Potential**	**(Existing Retail Sales)**	**Retail Gap**
Grocery Store (NAICS 4451)	$24,360,098	$51,000,000	**-$26,639,902**
General Merchandise Stores (NAICS 452)	$94,535,081	$38,107,021	**$56,428,060**
Department Stores Excluding Leased Depts. (NAICS 4521)	$38,362,420	$2,082,243	**$36,280,177**
Other General Merchandise Stores (NAICS 4529)	$56,172,661	$36,024,778	**$20,147,883**
Miscellaneous Store Retailers (NAICS 453)	$11,243,775	$6,198,703	**$5,045,072**
Florists (NAICS 4531)	$715,089	$443,361	**$271,728**
Office Supplies, Stationery, and Gift Stores (NAICS 4532)	$4,871,996	$2,082,994	**$2,789,002**
Other Miscellaneous Store Retailers (NAICS 4539)	$5,237,422	$3,558,138	**$1,679,284**
Electronic Shopping and Mail-Order Houses (NAICS 4541)	$7,515,831	$4,914,063	**$2,601,768**
Total General Merchandise Stores	**$218,654,275**	**$93,411,301**	$125,242,974
Food Services & Drinking Places (NAICS 722)	$100,434,685	$53,125,165	**$47,309,520**
Full-Service Restaurants (NAICS 7221)	$38,754,699	$22,680,041	**$16,074,658**
Limited-Service Eating Places (NAICS 7222)	$53,416,460	$27,790,963	**$25,625,497**
Special Food Services (NAICS 7223)	$2,317,240	$2,156,179	**$161,061**
Drinking Places - Alcoholic Beverages (NAICS 7224)	$5,946,286	$497,982	**$5,448,304**
Total Food Services & Drinking Places	**$200,869,370**	**$106,250,330**	$94,619,040

Translating that retail demand gap into the number of potential retail stores is the next challenge.

The Redwood Road Retail Mix

Bonneville Research estimates the potential capture rate of each individual store (there will always be some leakage due to travel, internet, mail-order, and other sales. Using sales per square foot estimates from ICSC and information on typical store sizes the number of potential new retail stores and the retail mix is then estimated.

The Redwood Road Shopping Market Area Industry Summary	**Retail Gap**	Potential Capture Rate	Sales per Sq Ft (ICSC)	Potential Store Size	Typical Store Size	# Potential Retail Stores
Grocery Store (NAICS 4451)	**-$26,639,902**	50%	650	-20,492	90,000	0
General Merchandise Stores (NAICS 452)	**$56,428,060**	50%	650	43,406	90,000	1
Department Stores Excluding Leased Depts. (NAICS 4521)	**$36,280,177**	45%	550	30,401	45,000	0.7
Other General Merchandise Stores (NAICS 4529)	**$20,147,883**	45%	950	25,772	5,000	5.2
Miscellaneous Store Retailers (NAICS 453)	**$5,045,072**	45%	850	5,765	90,000	0.1
Florists (NAICS 4531)	**$271,728**	45%	325	959	6,500	0.1
Office Supplies, Stationery, and Gift Stores (NAICS 4532)	**$2,789,002**	35%	325	5,082	4,500	1.1
Other Miscellaneous Store Retailers (NAICS 4539)	**$1,679,284**	35%	590	3,009	2,500	1.2
Electronic Shopping and	**$2,601,768**	70%	$1,503	3,390	1,500	2.3

Mail-Order Houses (NAICS 4541)						
Total General Merchandise Stores	$125,242,974	**46%**	**$590**	**166,015**	**120,000**	**1.4**
Food Services & Drinking Places (NAICS 722)	**$47,309,520**	15%	$550	26,530	4,500	5.9
Full-Service Restaurants (NAICS 7221)	**$16,074,658**	10%	$550	6,825	5,500	1.2
Limited-Service Eating Places (NAICS 7222)	**$25,625,497**	10%	$550	9,407	3,500	2.7
Special Food Services (NAICS 7223)	**$161,061**	10%	$550	408	3,500	0.1
Drinking Places - Alcoholic Beverages (NAICS 7224)	**$5,448,304**	15%	$550	1,571	3,500	0.4
Total Food Services & Drinking Places	$94,619,040	**10%**	**$550**	**35,374**	**5,500**	**6.4**

Source: ESRI, ICSC, *Bonneville Research 2011.*

Summary Redwood Road Marketplace Retail Mix - 2010.

Who could or should be establishing a business in the North Salt Lake Redwood Road Market Area?

- General Merchandise Store - At least one store of approximately 90,000 to 120,000 sq ft
- Food and Drink - At least six stores/restaurants/Café/Bars of approximately 5,500 sq ft

Grocery Store Potential:

Currently there is a surplus of supply of grocery store opportunities in the Redwood Road Market area, but because of freeway, railroad, geologic and other traffic barriers the Redwood

Road area is unique in the number of barriers to normal traffic and gravity demand models.

If the retail potential for the Redwood Road market area is calculated with a 5 minute drive time, and the additional 714 households are added there is still insufficient demand. An exceptionally strong grocery retailer may be able to draw from the Salt Lake City Rose Park area, but there are three existing grocery retailers and likely one would need to close before there is sufficient demand to be able to support a 60,000 to 80,000 sq ft grocery store in the Gun Club/Redwood Road area.