Agenda

- 6:00p - Doors Open & Refreshments
- 6:15p - Greetings & Welcome - Study Goals
  - Councilmember Oliver Thomas
  - Brenda Breaux, NORA
  - Bobby Boone, &Access
- 6:25p - Presentation
- 7:15p - Questions
- 7:30p - Closing Remarks & Networking

St. Claude Ave

RETAIL STUDY

OLIVER THOMAS OUR COUNCILMAN DISTRICT E

NEW ORLEANS REDEVELOPMENT AUTHORITY

&Access

February 2025

Create a community-driven strategy that enhances retail opportunities—particularly for food and grocery access—while empowering local businesses and preserving the cultural integrity of the corridor.

Study & Project Areas

Section 00

About AndAccess

Closer to What Matters

AndAccess is a team bringing essential goods and services closer to where people live, work, and play.

Our Team

Bobby Boone

Principal

Drew Lucco

Principal

Aaron Wilson

Project Director +

Business Manager

Erin Berry

Project Director

Jesse Bardsley

Urban Planner

Section 01

Intro to the Project

Project Timeline

- 5 MONTH PROCESS -

EXPLORE | ANALYZE | STRATEGIZE

EXISTING CONDITIONS ANALYSIS

TOURS & INTERVIEWS

ENGAGEMENT

RESIDENT SURVEY + GROCERY RECEIPTS

CASE STUDIES + MARKET ANALYSIS

STRATEGY + IMPLEMENTATION

WORKSHOP

KICKOFF +
ENGAGEMENT PLAN

FINDINGS
MEMO

DELIVERABLE

OCT | NOV | DEC | JAN | FEB | MAR

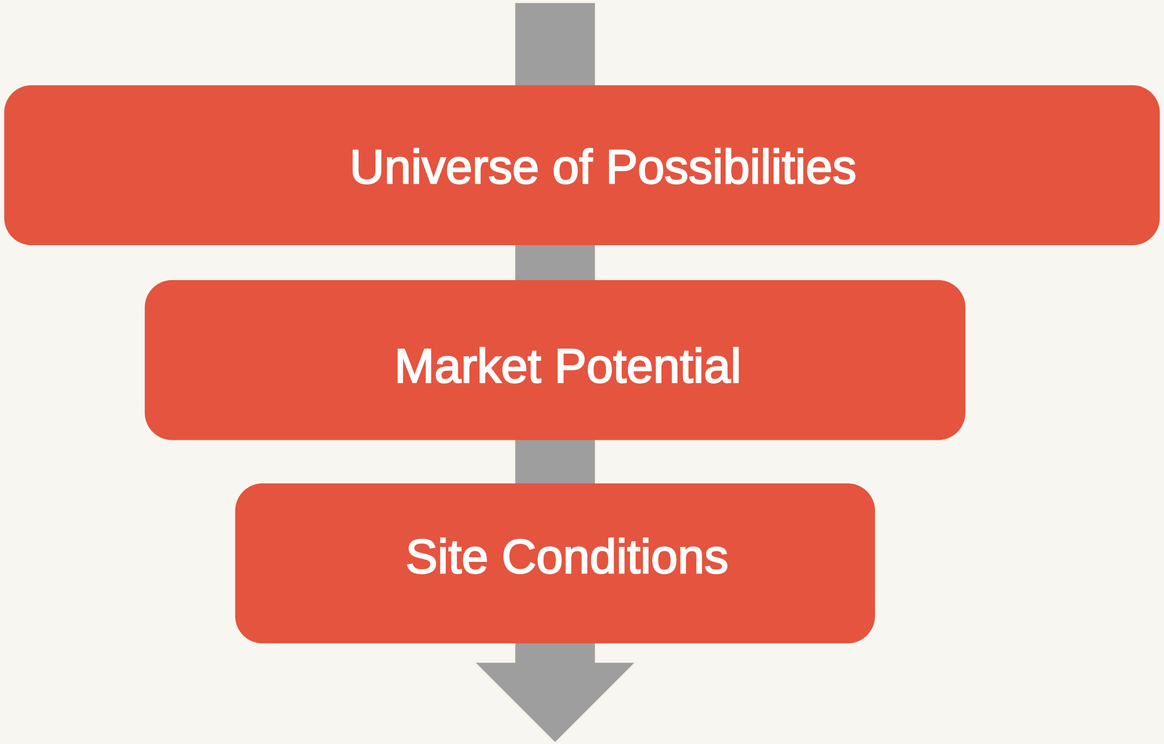
RESIDENT
ENGAGEMENT

RESIDENT
ENGAGEMENT

RESIDENT
ENGAGEMENT

RESIDENT
ENGAGEMENT

Our Process

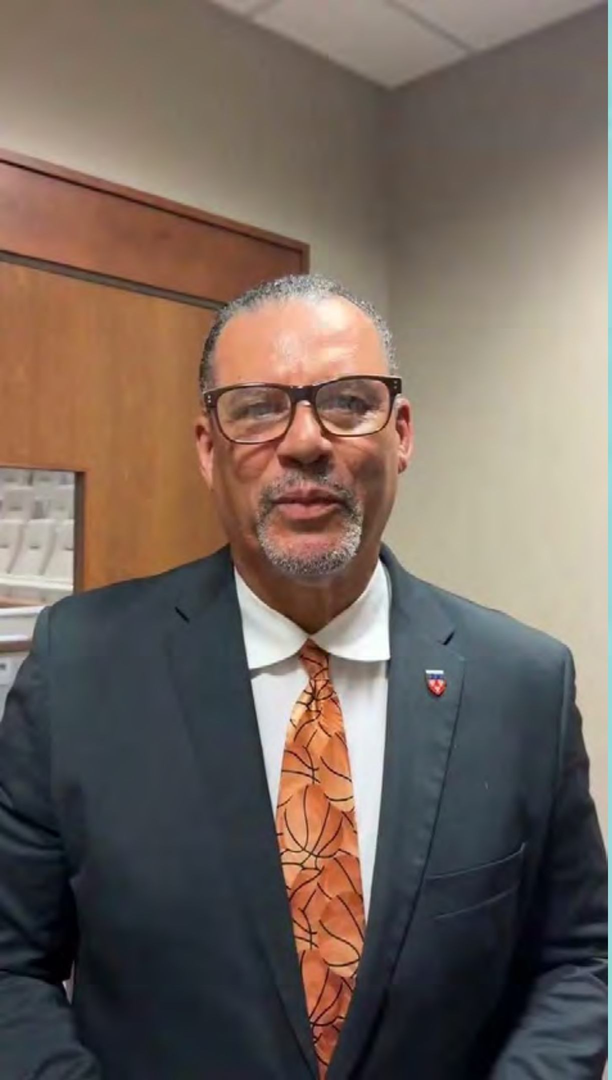


Strategy that can be successfully implemented

Engagement Activities

The And Access team conducted a series of engagements through the project timeline to include:

- Kickoff Meeting - October 2, 2024
- Interviews and Focus Groups
  - Lower 9th Ward Economic Development District
  - Lower 9th Ward Homeownership Association
  - Lower 9th Ward Neighborhood Association
  - Other Residents and Community Stakeholders
  - New Orleans Redevelopment Authority
  - City of New Orleans Office of Economic Development
  - Councilmember Thomas's Office
  - Real Estate Brokers
  - Business Owners
- Walkshop - A Community Workshop on Foot - October 26, 2024
- Flyer Canvassing by Xavier University Students
- Resident Survey
- Grocery Store Receipt Collection & Survey
- Community Workshop - February 6, 2025




St. Claude Ave
RETAIL STUDY
Support the ongoing retail study aimed at expanding goods and services on St. Claude Avenue, with a focus on bringing a new supermarket to the community.
PARTICIPATE NOW:
Receipt Submission
(Nov - Dec)
Text recent grocery receipt to (504) 229-2218 for a chance to receive a $25 Gift Card
Retail Needs Survey
(Nov - Dec)
To participate, visit: bit.ly/stclaudesurvey
UPCOMING OPPORTUNITIES
Workshop
(Jan 2025)
Community Meeting
(Feb 2025)
OLIVER
Access


YOU BELONG
You are Loved
LOVE

Engagement Activities

- Resident Survey (100)
- Grocery Store Receipt Collection & Survey (24)
- Grocery Store Secret Shopping
  - Thirteen (13) Items
    - Butter
    - Whole Milk
    - Eggs
    - Sweet Tea
    - Chicken Breast
    - Spaghetti
    - Vegetable Oil
    - Cheerios
    - Loaf of Bread
    - Baked Beans
    - Cabbage
    - Bananas
    - Sweet Potatoes




PURPOSE OF RETAIL

- Community Value
  - Convenient/Close to Home
  - Tradition/History
  - Represents Your Hometown Experience
  - Is Part of Your Vibrant Street/Neighborhood Core

Which locations have the greatest value to the community?

Retail as Identity

Retail as Amenity

Retail as $$$ Generator

Retail as Civic Use

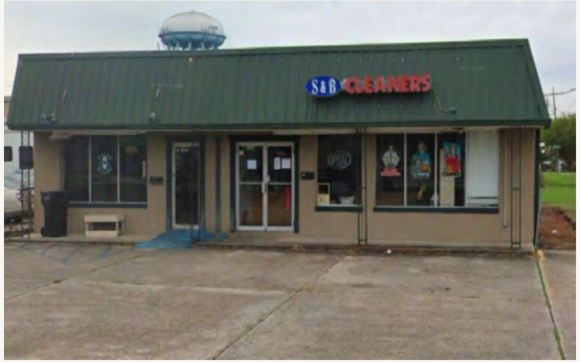
Retail as Commerce

RETAIL TERMINOLOGY**RETAIL CATEGORIES**

NEIGHBORHOOD GOODS AND SERVICES (NG&S)

Basic Needs:

- Grocery
- Pharmacy
- Florist
- Dry Cleaners
- Nail/Hair Salon
- Wine/Liquor Store



RETAIL TERMINOLOGY**RETAIL CATEGORIES**

FOOD AND BEVERAGE (F&B)

- Restaurant
- Cafe
- Bar
- Coffee Shop
- Sub Shop
- Ice Cream Store
- Fast Food

RETAIL TERMINOLOGY**RETAIL CATEGORIES**

GENERAL MERCHANDISE, APPAREL,FURNISHINGS, & OTHER (GAFO)

- Clothing Store
- Food Store
- Furniture Store
- Electronics Store
- Jewelry Store
- Bookstore
- Home Decor Store
- Hardware Store
- Sporting Goods Store
- Card Store
- Office Supplies Store
- Pet Store
- Toy Store
- Discount Variety Store
- Thrift Store

RETAIL TERMINOLOGY**NON RETAIL USES**

- Offices
  - Doctor's
  - Travel Agent
  - Bail Bonds
  - Check Cashing
  - Tax Preparation
- Churches
- Educational Facilities
- Daycare
- Gyms
- Funeral Homes
- Radio Stations
- Automobile Dealerships & Repair Shops

Section 02

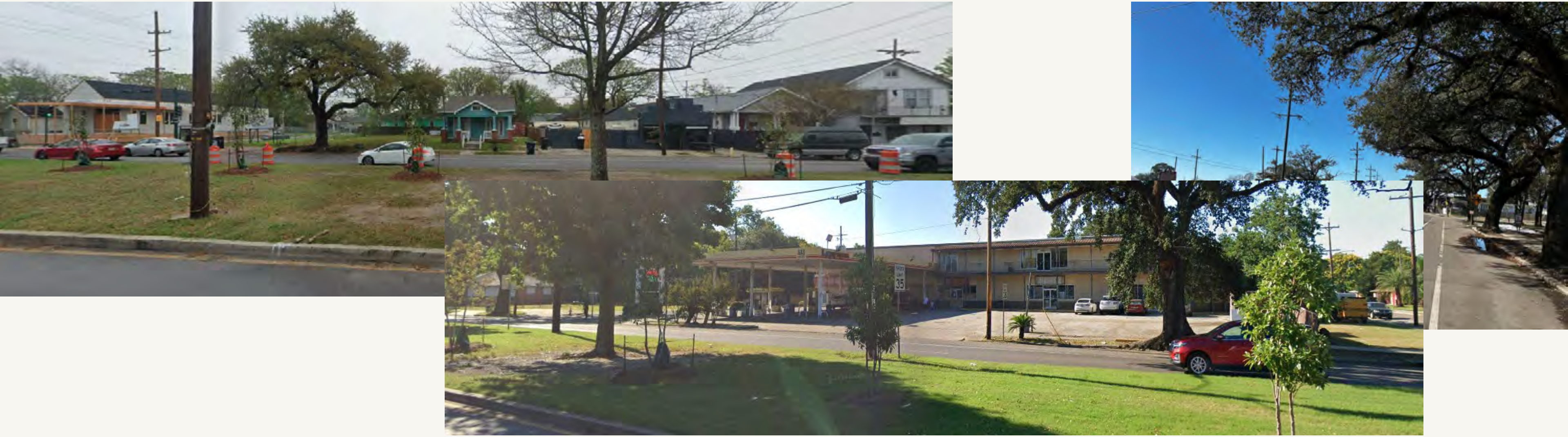
Best Practices & Findings

CONCENTRATED RETAIL & DOUBLE SIDED STREETS

Key Point: Retail environments work better when storefronts form a continuous row. Vibrancy thrives when retail exists to pedestrian and vehicle traffic.

Why It Matters: Avoids dead zones, enhances customer flow, and encourages foot traffic. Maximizes exposure to pedestrian and vehicle traffic.

Example: Clusters of shops in walkable commercial districts. Active shopping streets with crosswalks and easy accessibility.



ACCESSIBILITY & HIGH VISIBILITY LOCATIONS

Key Point: The easier it is to get a business, the more successful it will be. Not every street is a retail street.

Why It Matters: Walkability, public transit access, and minimal obstacles increase sales potential. Retail thrives in high-traffic areas with strong visibility.

Example: Wide sidewalks, bike racks, and transit stops near retail clusters.Major intersections or well-lit, high footfall locations.

ACCESSIBILITY & VISIBILITY

- Accessibility evaluates road conditions, traffic volumes, and transportation options to determine how easily customers can reach a location.
- Retailers use this data to analyze market demographics, project sales, inform site selection, negotiate leases, and plan for future growth.
- Visibility plays a pivotal role in retail market analysis, directly affecting a store's exposure to potential customers.
- A highly visible location enhances brand recognition, increases awareness among both pedestrians and drivers, and encourages spontaneous visits.




ACCESSIBILITY & VISIBILITY | ROAD CONDITIONS

- The Industrial Canal, separates the easternmost blocks, restricting north-south access (see dark gray line on the map).
- Beyond this divide, the avenue (marked in blue) is a mix of commercial, residential, and vacant properties, with roads divided by a median and including On-street parking and a bicycle lane
- St. Claude has about half the traffic count of nearby Claiborne
- Proposals for the reactivation of the railway for industrial uses have emerged.

The Lower Ninth Ward benefits from strong bus connectivity:

- Route 8 links directly to the French Quarter.
- Route 84 runs along Claiborne, connecting the neighborhood to the Central Business District (CBD).
- Route 86 is strategically designed to enhance access to St. Bernard's retail hub.
- The S Line provides a crucial link between St. Bernard Parish and Jackson Barracks

ZONING & REGULATIONS

Key Point: Retail development must align with city policies.

Why It Matters: Zoning impacts store locations, building types, and business operations..

Example: Mixed-use zoning allowing retail, office, and residential in the same area..

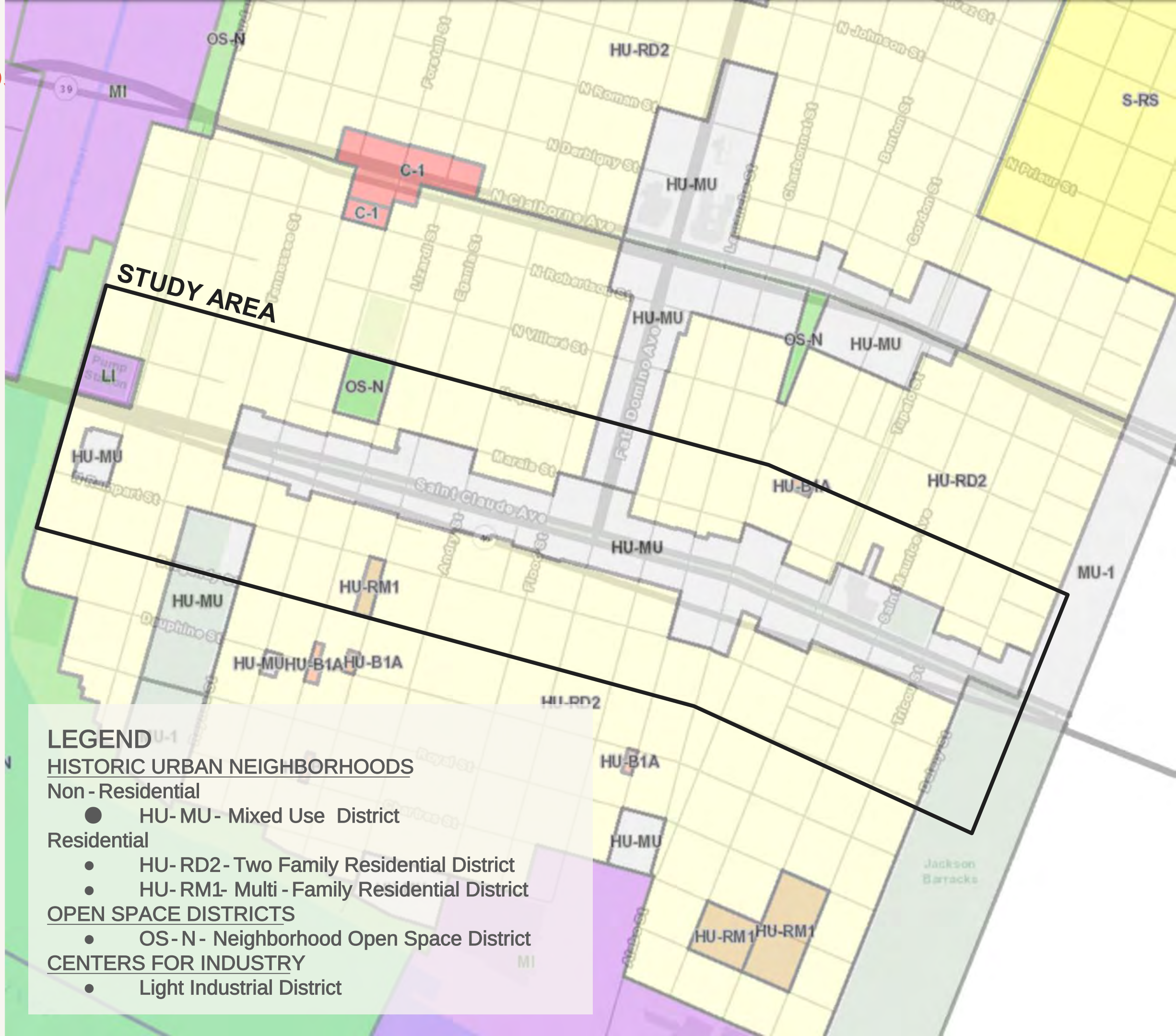
ZONING | HISTORIC URBAN NEIGHBORHOOD

Strengths of the HU - MU Zoning District for Retail:

- Proximity to Residential Areas
- Encouragement of Mixed - Use Development
- Affordable Housing Incentives
- Flexibility for Small Retailers
- Neighborhood - Centric Commercial Options

Challenges of the HU - MU Zoning District for Retail:

- Size Limitations for Larger Retail
- Non - Contiguous Retail Frontage
- Height and Density Restrictions
- Limited Drive - Through Options



Upper vs. Lower 9th Ward (Zoning)

HMC-2 accommodates a broader range of intensive commercial and entertainment-oriented uses not found in HU-MU

- Such as: hospitality centers, live performance venues, commercial adult day care centers, wholesale goods establishments, and certain commercial office uses (e.g., broadcast studios, printing establishments, commercial horse stables).

HU-MU in the study area imposes more restrictions aimed at fostering **walkable, mixed-use neighborhoods**, which can limit the intensity of commercial activity. Key distinctions include:

- **Permitted by right**: Carry-out restaurants, animal hospitals, and a wider range of residential uses
- **Conditionally permitted** (and not permitted in HMC-2): Auto-oriented uses such as gas stations, service centers, and car washes; warehousing; food processing; and Mardi Gras dens

PARKING INTEGRATION

Key Point: Retail should accommodate customers arriving by multiple modes of transport.

Why It Matters: On-street and well-placed parking support foot traffic while preserving urban density.

Example: “Park once, shop multiple places” strategies.

FLEXIBLE & APPROPRIATE SPACES

Key Point: Retail spaces should adapt to changing tenant needs.

Why It Matters: Modular storefronts allow for long-term retail sustainability.

Example: Standard-sized storefronts (25-30 ft wide) with adaptable depth. Colorful storefronts help.

UNCLUTTERED STREETSCAPES

Key Point: Overcrowded sidewalks can hurt retail.

Why It Matters: Too many trees, benches, or obstructions can block store visibility..

Example: Thoughtfully placed amenities that enhance, not hinder, retail appeal.

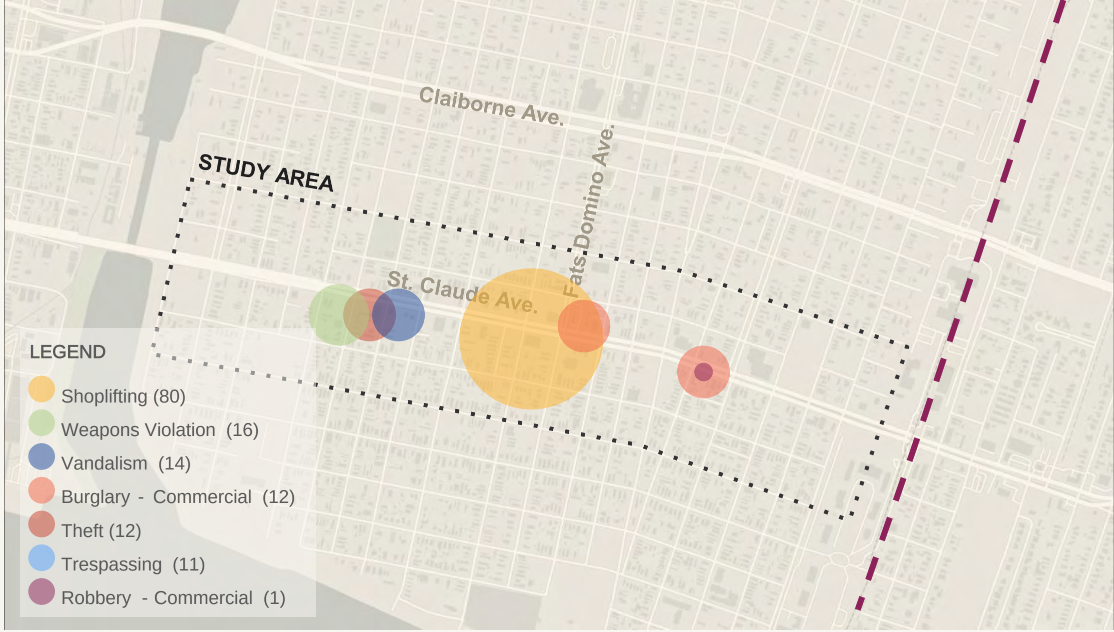
SAFETY & PERCEPTION

Key Point: Perceived and actual safety impact retail success..

Why It Matters: Poor lighting, crime concerns, and neglected storefronts deter customers..

Example: Well-lit sidewalks, active storefronts, and community policing initiatives..

SAFETY



HOT SPOTS	CRIME TYPE(S)
BROTHERS ST CLAUDE	THEFT ; WEAPONS VIOLATION; VANDALISM
5500 ST CLAUDE - FMR WALGREENS	SHOPLIFTING
SEAFOOD AND CHICKEN MARKET	BURGLARY- COMMERCIAL
NOLA VILLAGE MARKET	BURGLARY- COMMERCIAL; ROBBERY- COMMERCIAL

9

According to the Resident Survey, **67% of residents feel safe when shopping in the corridor.**

APPENDIX B: CRIME REPORTS

CRIME	# OF INCID.	HOT SPOTS
1/1/2015 - 1/15/2025		
BURGLARY- COMMERCIAL	44	NOLA VIllage Market 6100 St Claude (5); Seafood and Chicken Market 5601 St Claude (4)
BURGLARY- RESIDENTIAL	326	924 Deslonde (5); 462 Flood St (3); 6125 Marais St (3)
ROBBERY - INDIVIDUAL	73	Brothers St Claude 5104 St Claude (6); 5700 St Claude (3)
ROBBERY - COMMERCIAL	3	1000 Lizardi Street; 5456 St Claude; NOLA VIllage Market
THEFT	305	6101 Bienvenue St (4); Central Missionary Baptist Church 1438 Alabo St (4)
MOTOR VEHICLE THEFT	492	Fuel Express Mart 5201 N Claiborne Ave (10); 500 St Maurice Ave (8); 938 St Maurice Ave (5)
ASSAULT- AGGRAVATED	270	Gordon Street Convenience Mart 5976 Urquhart St (9); Cajun Joe's Seafood 6024 N. Claiborne (5)
HOMICIDE/MANSLAUGHTER	29	602 Delery St (2)
SEXUAL ASSAULT	84	1125 Tricou St (2)
SHOPLIFTING	90	5500 St Claude (80); Magnolia Market (6)
TRESPASSING	30	Magnolia Market (11); 1329 Delery St (2)
ASSAULT- SIMPLE	500	Phillippi Evangelical Church of God in Christ (6); 6023 N Rampart St (7); 1640 Andry St (5)
VANDALISM	434	Brothers St Claude (14); 5525 St Claude (5)
ATTEMPTED HOMICIDE	1	Tupelo St x Urquhart
THEFT- OTHER	339	Brothers St Claude (12)
WEAPONS VIOLATION	90	Brothers St Claude (16); 5201 N Claiborne (4)

PHYSICAL & PSYCHOLOGICAL BOUNDARIES

Key Point: Walls, highways, and parking lots can break up retail flow.

Why It Matters: These barriers disrupt customer movement between retail zones.

Example: Bridges, alleys, or pedestrian-friendly crossings that disconnect districts.

PHYSICAL & PSYCHOLOGICAL BARRIERS

Primary Challenges:

1. Municipal boundaries
2. The USACE Canal
3. Vacant land
4. Limited road networks

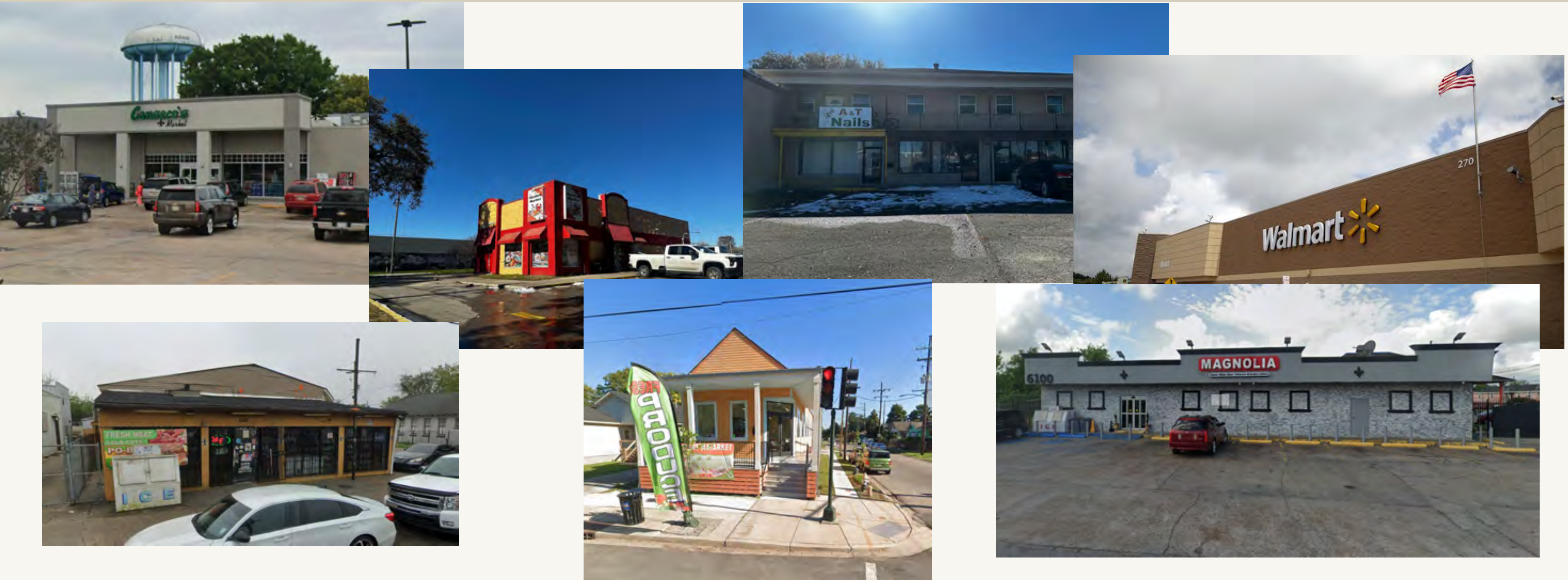
BUILDING CONDITIONS

- Building condition plays a pivotal role in overcoming psychological barriers to retail success, directly influencing a customer's perception of safety, trust, and desirability.
- When retail spaces are in poor condition, they can deter potential customers and lower confidence in the quality of products or services offered.

COMPETITION & TRADE AREAS

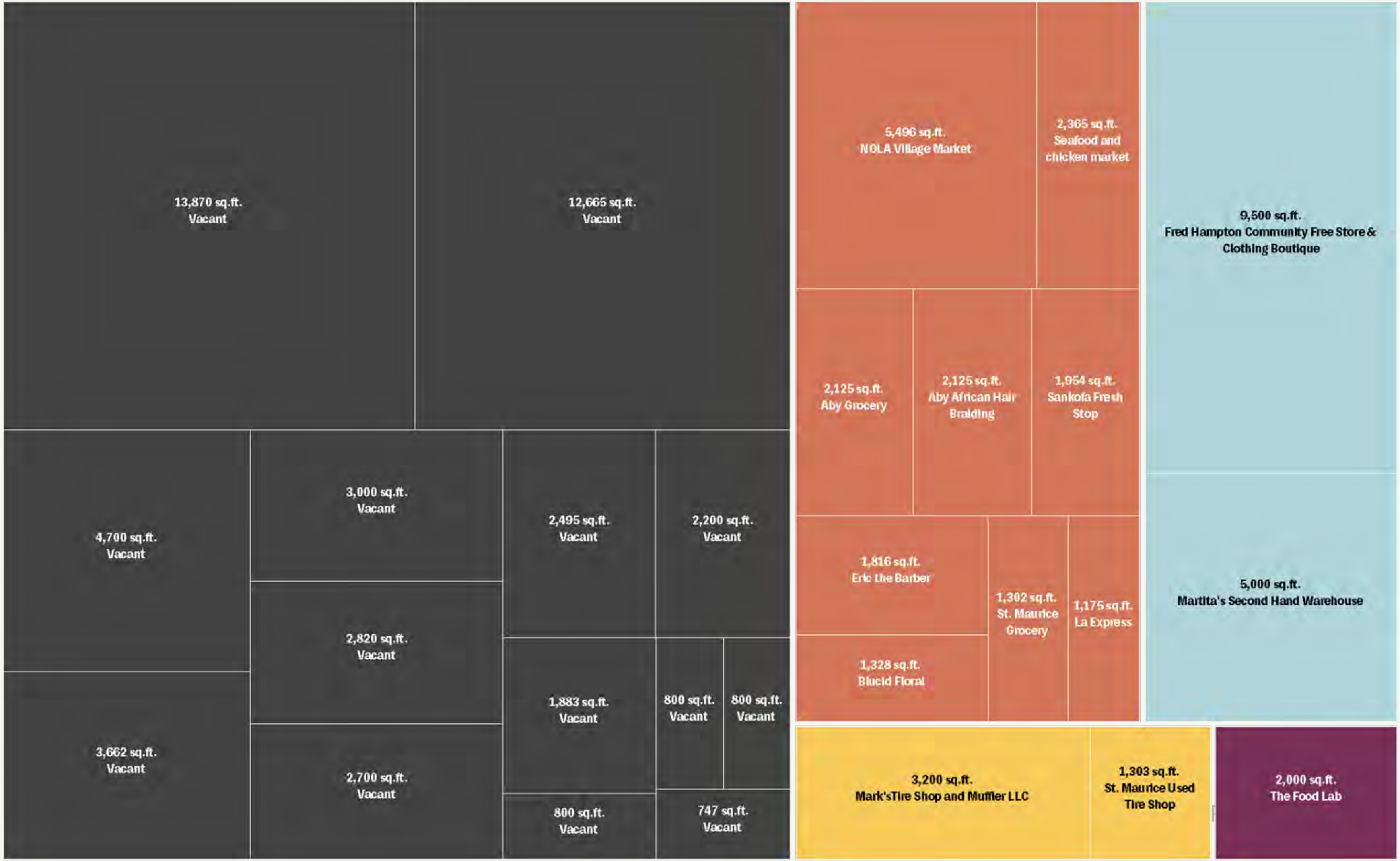
Key Point: Understanding the market landscape is crucial.

Why It Matters: Successful retail depends on knowing demand and avoiding oversaturation.



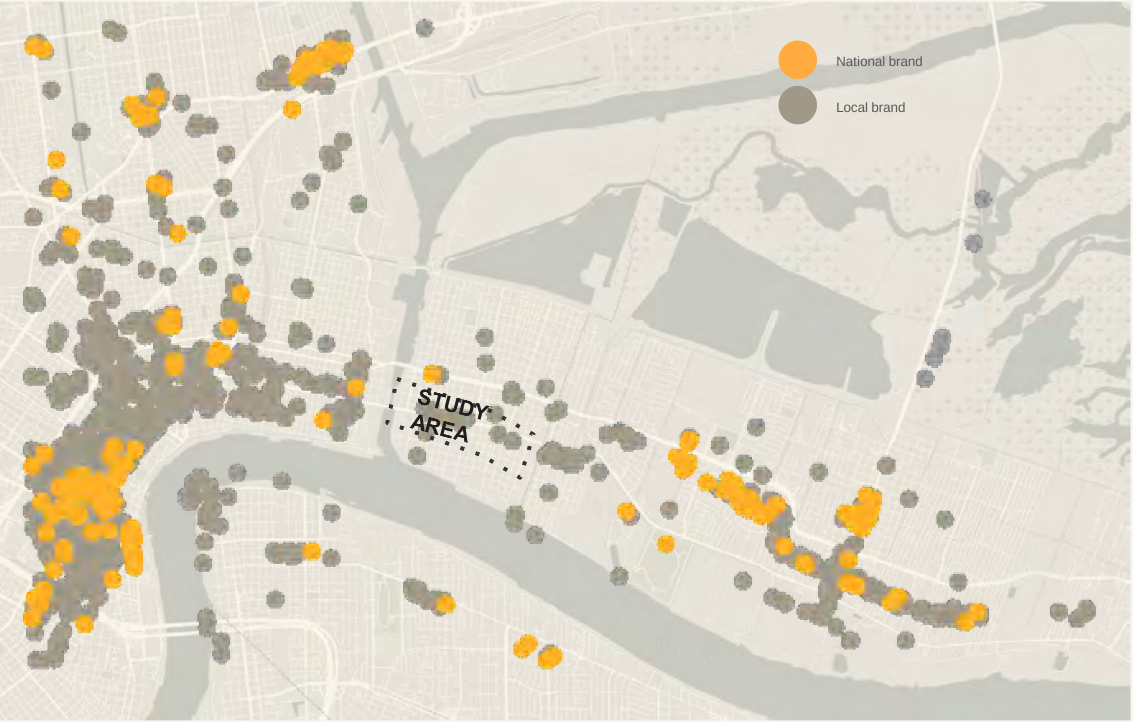
RETAIL INVENTORY

RETAIL INVENTORY



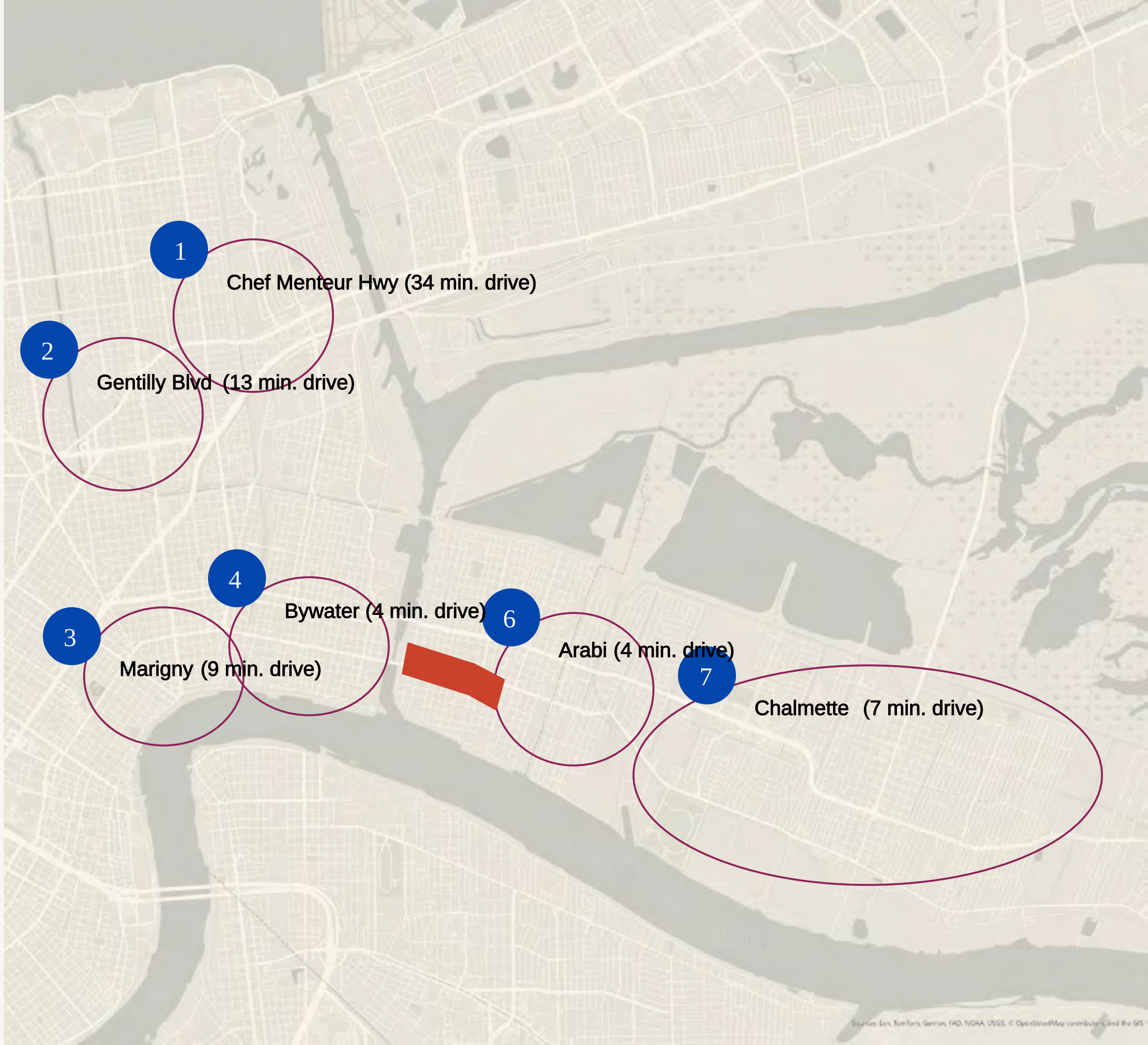
NATIONAL & LOCAL BRANDS

- St. Claude in L9W is less densely populated with retail than surrounding areas.
- Retail benefits from colocation with other retail uses, both in their own retail cluster and in other retail-serving categories.



COMPETITIVE POSITIONING

- The study area functions primarily as a neighborhood-serving market.
- Established and emerging shopping destinations at its periphery provide residents with a broader range of goods and services.



COMPETITIVE POSITIONING

Established Retail Hubs:

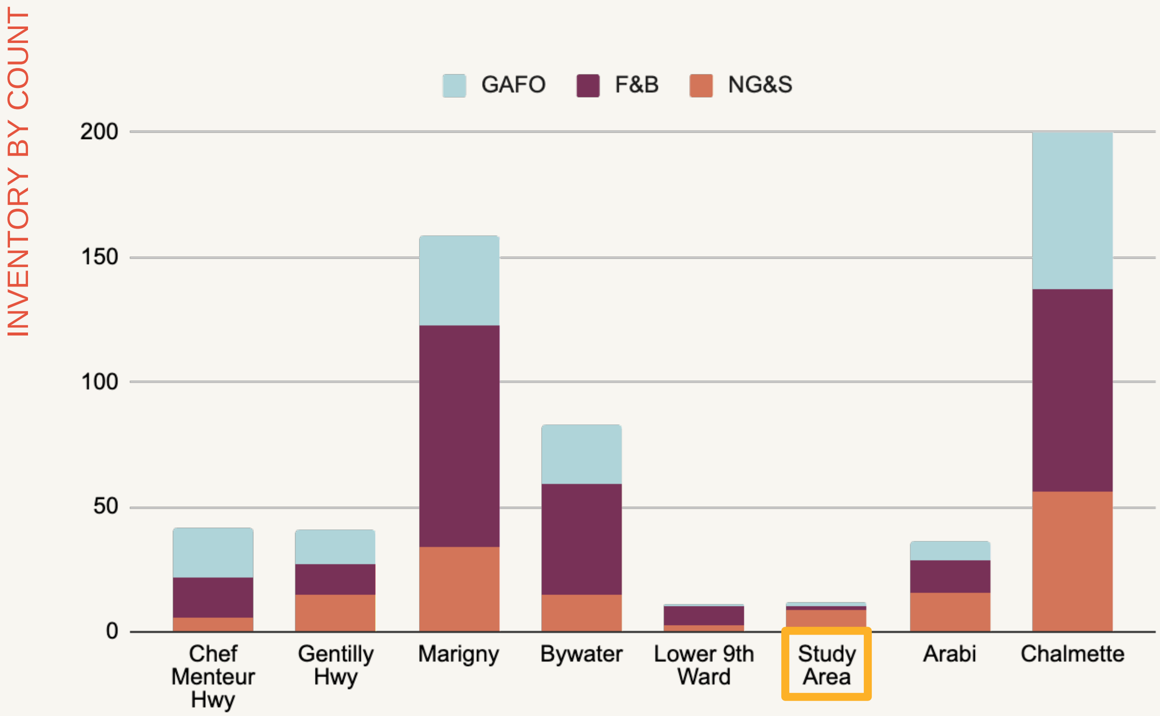
- Marigny
- Chalmette
- Chef Menteur Hwy
- Gentilly Hwy

Emerging Retail Clusters

- Bywater
- Arabi

Underdeveloped Retail Corridors:

- Lower 9th Ward



Established Retail Hubs:

- Marigny
- Chalmette
- Chef Menteur Hwy
- Gentilly Hwy

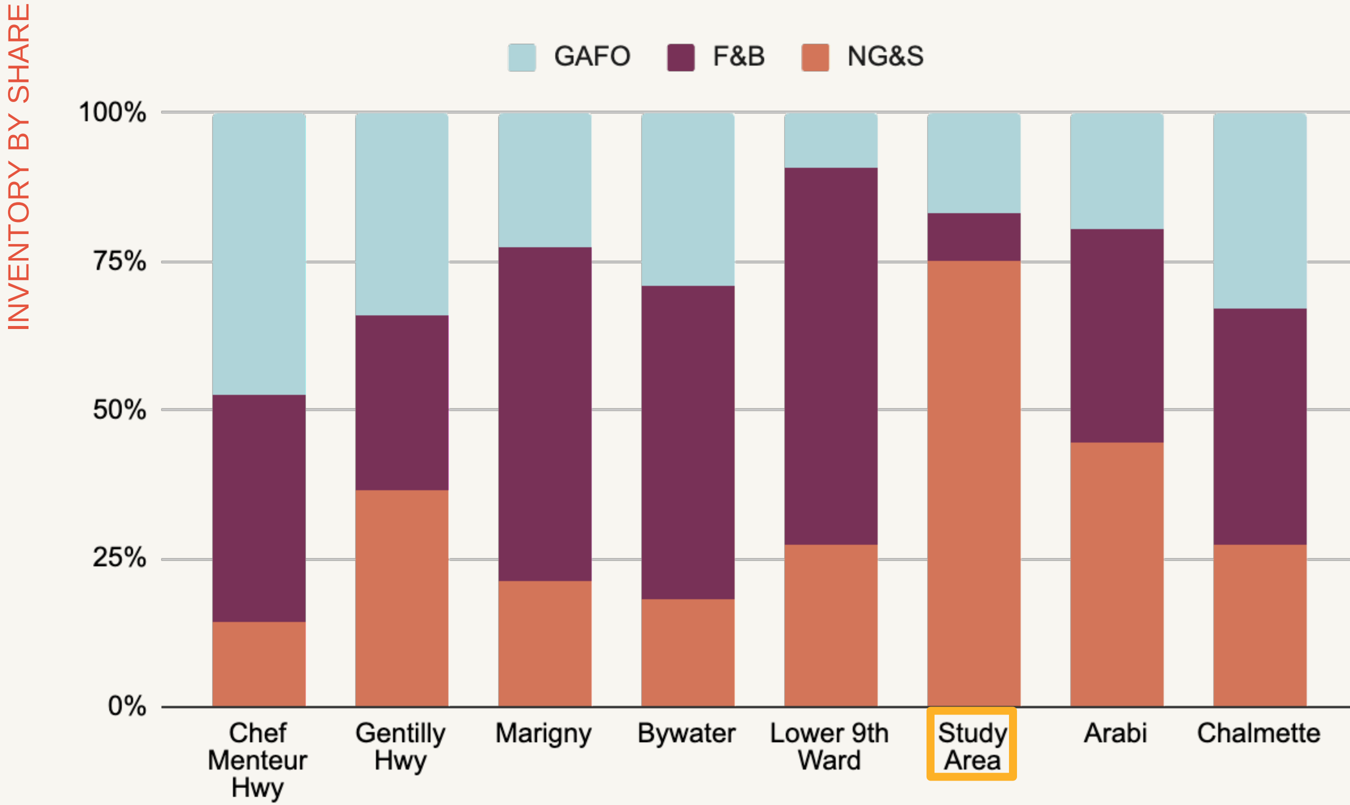
Emerging Retail Clusters

- Bywater
- Arabi

Underdeveloped

Retail Corridors:

- Lower 9th Ward

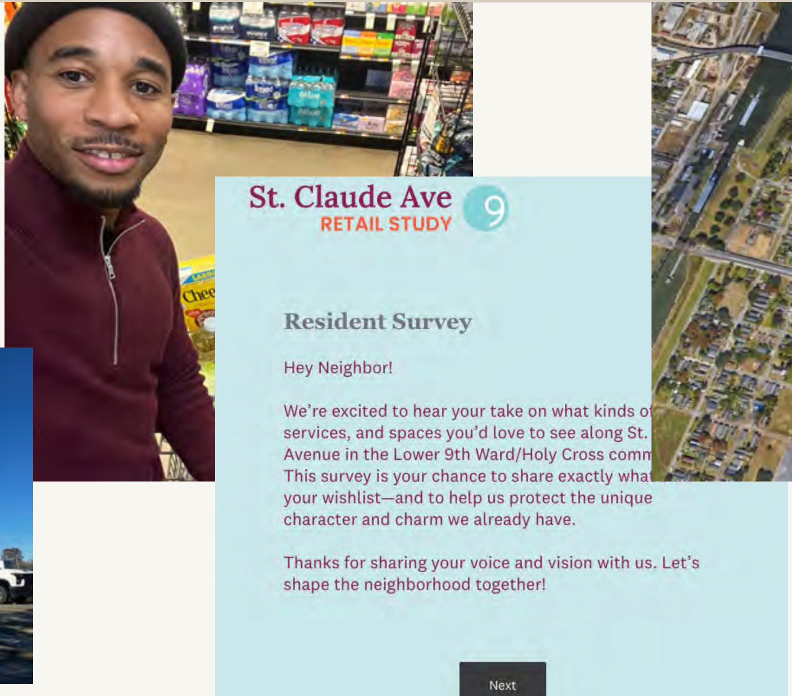


SALES VOLUMES & MARKET DEMAND

Key Point: A successful retail mix reflects local purchasing power.

Why It Matters: Some areas can only support specific types of retail.

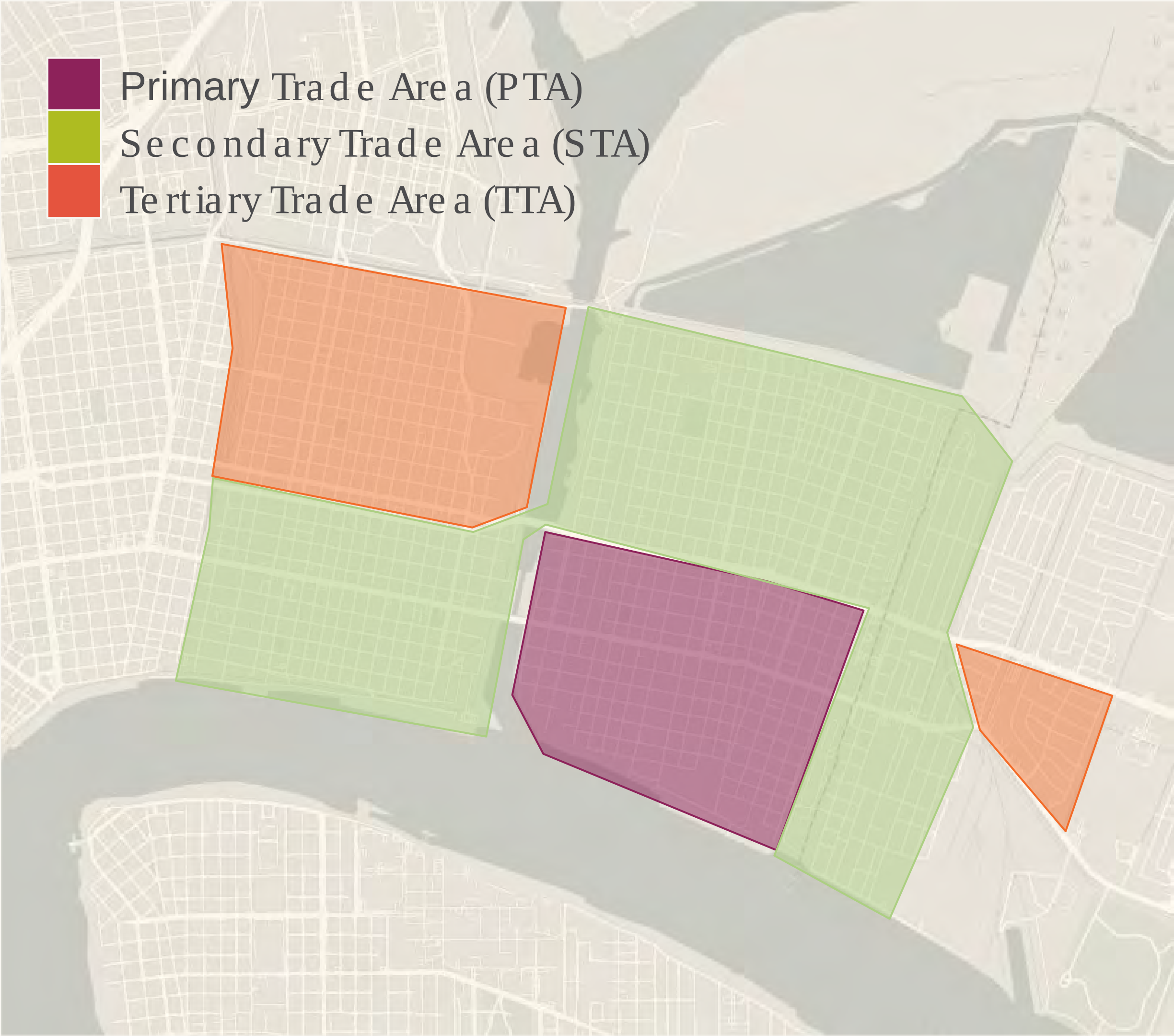
Example: Essential goods in neighborhoods with lower incomes vs. luxury retail in high-footfall districts.



KEY DEMOGRAPHICS

2024	Study Area	Zip Code 70117	New Orleans City	St. Bernard Parish	New Orleans MSA
2024 TOTAL POPULATION	5,362	27,901	376,842	45,648	989,542
2024 HOUSEHOLDS	2,266	13,368	165,215	17,003	408,484
2024 AVERAGE HOUSEHOLD SIZE	2.37	2.08	2.19	2.67	2.37
2010 Black Alone	92.2%	75.1%	60.2%	17.7%	39.9%
2024 Black Alone	77.8%	62.7%	53.6%	26.3%	38.6%
AGE 55+	27.2%	27.6%	27%	26.3%	29.4%
BACHELOR'S DEGREE	11.6%	20.4%	23.3%	12.2%	20.5%
GRADUATE/PROFESSIONAL DEGREE	12.5%	13.8%	20.2%	6.2%	14.0%
No Vehicle Available	25.8%	23.4%	17.4%	7.2%	9.4%
2024 Average Household Income	$57,131	$65,548	$92,880	$77,244	$93,058
2024 Median Household Income	$39,453	$39,109	$53,582	$55,341	$60,548

TRADE AREAS


Primary Trade Area (PTA)
Secondary Trade Area (STA)
Tertiary Trade Area (TTA)

SALES VOLUMES & MARKET DEMAND

TOTAL AMOUNT OF CUSTOMERS AND SPENDING

=

TOTAL AMOUNT AND TYPE OF RETAIL ESTABLISHMENTS

SALES VOLUMES & MARKET DEMAND

TOTAL AMOUNT OF CUSTOMERS AND SPENDING

=

TOTAL AMOUNT AND TYPE OF RETAIL ESTABLISHMENTS

TOTAL HOUSEHOLDS X
AVG. EXPENDITURES /
SALES PER SQUARE FOOT

SQUARE FOOTAGE OF SUPPORTABLE RETAIL SPACE

SQUARE FEET OF SUPPORTABLE RETAIL DEMAND

MODEL 1: REGIONAL SALES

	Existing Inventory	Regional Sales Model	Unmet Demand
NG&S	19,676	15,955	-3,721
F&B	2,000	3,275	1,275
GAFO	14,500	1,579	-12,921
Total	36,176	20,809	-15,367

MODEL 2: LOCAL SALES

	Existing Inventory	Local Rent Model	Unmet Demand
NG&S	19,676	42,450	22,774
F&B	2,000	12,555	10,555
GAFO	14,500	4385	-10115
Total	36,176	59,390	23,214

SQUARE FEET OF SUPPORTABLE RETAIL DEMAND

Comparable and Competition Analysis Revealed that gaps exist in many categories of retail. National brands not recommended.

Neighborhood Goods & Services (NG&S)

- Dry Cleaners/Laundromat
- Grocery

Food & Beverage (F&B)

- Restaurants (All Categories)
- Coffee Shops
- Bars

General Merchandise (GAFO):

- Small Boutique

GAPS - 35% ARE VERY DISSATISFIED WITH OPTIONS AVAILABLE

(Most WIC/SNAP participants neutral on options)

9

SQUARE FEET OF SUPPORTABLE RETAIL DEMAND | GROCERY

MODEL 1: REGIONAL SALES

	Regional Sales Model	Existing Inventory	Unmet Demand
Total	10,341	14,417	-4,076

REGIONAL SALES MODEL SQ. FT. DEMANDED	
Bakery + Cereal Products	1,926
Meats, Poultry, Fish, + Eggs	1,213
Dairy Products	906
Fruits + Vegetables	1,068
Snacks and Other Food at Home	5,091
TOTAL	10,341

MODEL 2: LOCAL SALES

	Regional Sales Model	Existing Inventory	Unmet Demand
Total	25,956	14,417	11,539

REGIONAL SALES MODEL SQ. FT. DEMANDED	
Bakery + Cereal Products	4,777
Meats, Poultry, Fish, + Eggs	3,033
Dairy Products	2,242
Fruits + Vegetables	2,669
Snacks and Other Food at Home	12,870
TOTAL	25,956

5330 ST. CLAUDE

5401ST.CLAUDE

5523 ST. CLAUDE

3 EXPECTED TENANTS, INCLUDING CONVENIENCE STORE

(⅓ OF 10,237 SF = 3,412 SF)

BROTHERS GAS STATION

2,070 SQ.FT.

STERLING EXPRESS + PHARMACY,

9,500 SQ. FT.

(PHARMACY 734 SQ. FT.)

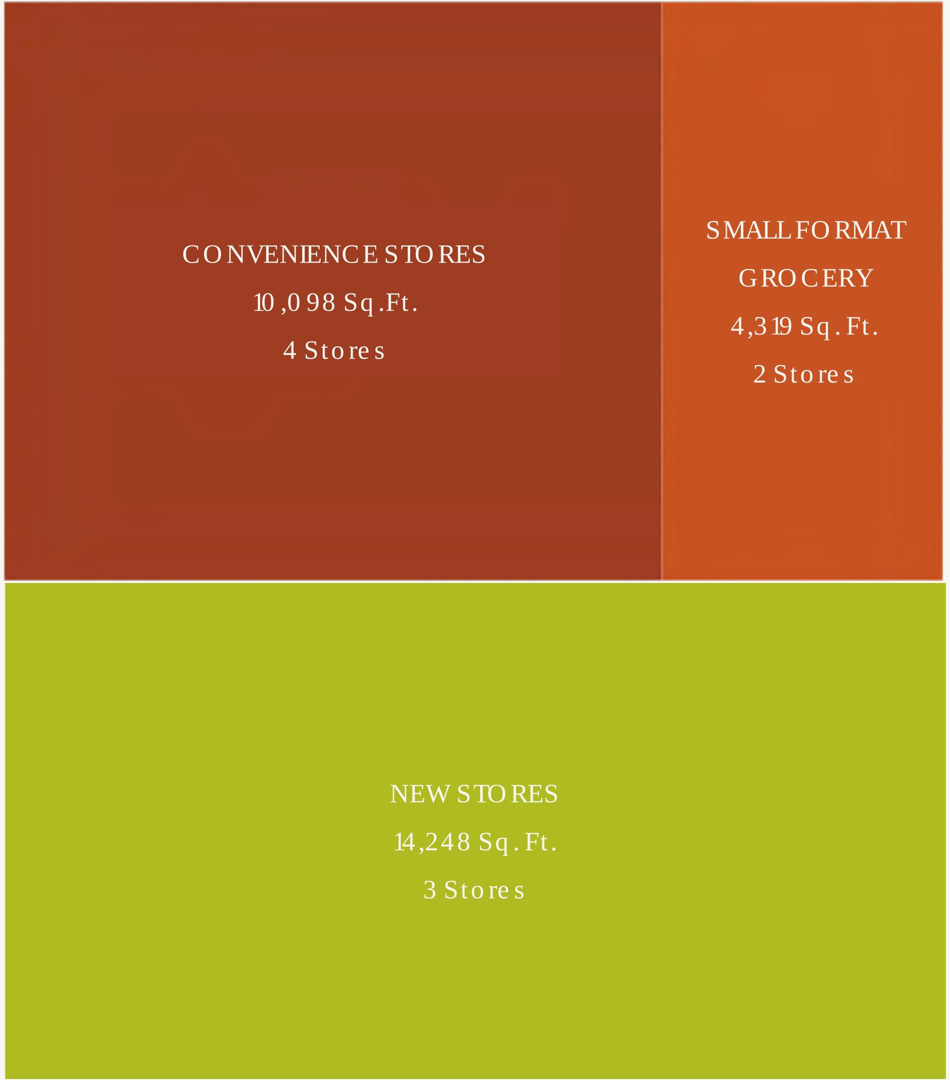
3,412 SQ.FT. + 2,070 SQ.FT. + 8,766 SQ.FT. =

14,248 SQ.FT.

GROCERY INVENTORY

28,665 Sq. Ft.

Total Existing + Planned Sq.Ft.



KEY FINDING

&Access x NORA

SQUARE FEET OF SUPPORTABLE RETAIL DEMAND | GROCERY

The square footage of existing, planned, and under construction convenience stores exceed Food at Home (grocery) retail demand.

MODEL 1: REGIONAL SALES

	Regional Sales Model (Demand)	Existing Inventory (Supply)	Unmet Demand
Total	10,341	28,665	- 18,324

MODEL 2: LOCAL SALES

	Regional Sales Model (Demand)	Existing Inventory (Supply)	Unmet Demand
Total	25,956	28,665	- 2,709

KEY FINDING

Comparable districts that have a supermarket, have 1-2 convenience stores.

AND

Comparable districts that have more than 2 convenience stores do not have a supermarket

59% of residents report poor product selection

PROXIMITY TO CUSTOMERS

Key Point: Retail should be located near its primary customer base.

Why It Matters: Convenience drives foot traffic and sales.

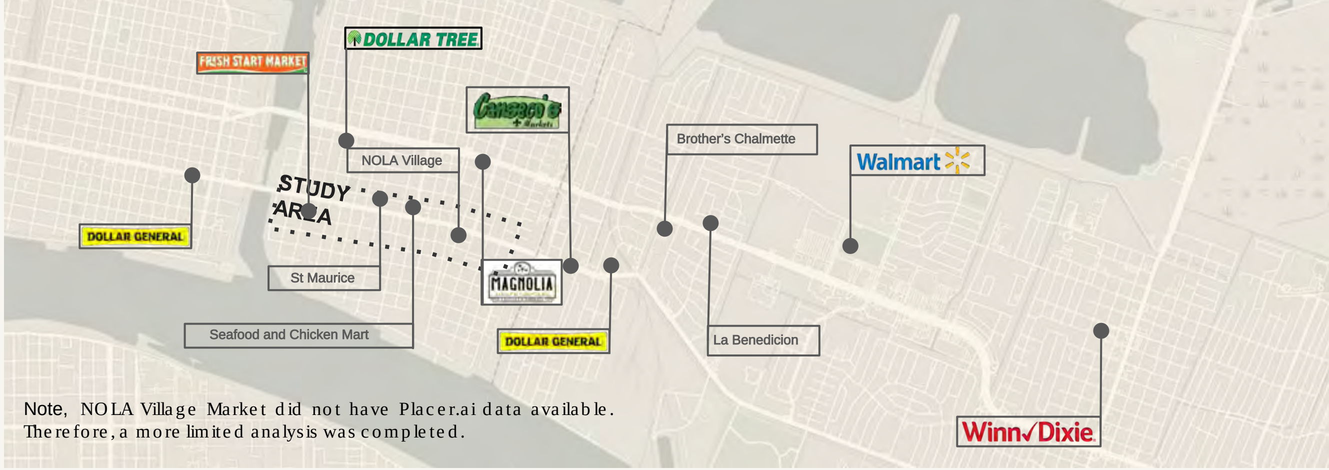
Example: Stores clustered near dense residential areas, major employers, or visitor attractions.

379,171 SQ.FT

GROCERY INVENTORY | COMPETITIVE SET

TOP GROCERY STORESPATRONIZED (SURVEYRESULTS)

- Walmart (65%)
- Cansecos (55%)
- **Winn Dixie (20%)**
- Sankofa Fresh Stop (18%)
- Dollar General (15%)
- Chicken Mart (7%)



Note, NOLA Village Market did not have Placer.ai data available. Therefore, a more limited analysis was completed.

Big Box Grocers
Walmart (2.3 mi away)

Conventional Supermarkets
Winn Dixie (4.5 mi away)

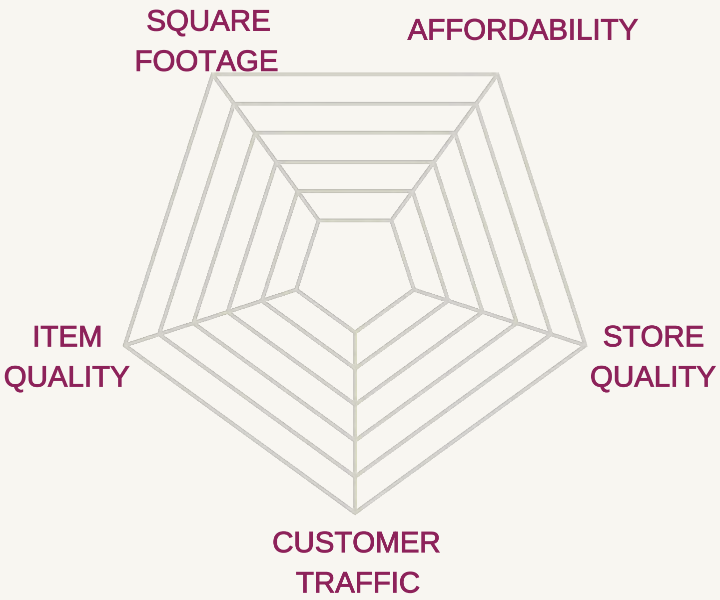
Dollar Stores
Dollar General - Arabi (1 mi away)
Dollar General - Bywater (1 mi away)
Dollar Tree (0.7 mi away)

Small Format Grocers
Seafood and Chicken Market (0 mi away)
Sankofa Fresh Start Market (0.4 mi away)
Canseco's (1.1 mi away)
Magnolia (0.7 mi away)
La Benedicion (1.8 mi away)

Convenience Stores
St. Maurice Market (0 mi away)
NOLA Village Market (0.3 mi away)
Brothers Chalmette (1.5 mi away)

GROCERY COMPETITIVE SET

SECRET SHOPPING | PRICE & QUALITY ANALYSIS



LARGER SHADED AREA = MEET MORE CONDITIONS

GROCERY INVENTORY | OPPORTUNITY SET- AVG. STORE SIZE

Robért fresh market	Ideal Market	Rouses Markets	Whole Foods Market
3 LOCATIONS 24,533 SQ.FT.	3 LOCATIONS 7,633 SQ.FT.	3 LOCATIONS 72,430 SQ.FT.	BROAD ST. 25,800 SQ.FT.

GROCERY INVENTORY | OPPORTUNITY SET-DEMOS (1MI. RADIUS)

STUDY AREA (FATS DOMINO & ST. CLAUDE)	Robért fresh market	IDEAL MARKET	ROUSES MARKETS	WHOLE FOODS MARKET
AVG. HH INCOME $43,244	$90,705	$65,894	$74,523	$57,674
POPULATION 7,830	20,192	21,296	19,382	24,323

RISKY!

LOWER POPULATION & HOUSEHOLD INCOMES = CHALLENGES WITH CUSTOMER/SALES ACQUISITION & RETENTION

GROCERY INVENTORY | OPPORTUNITY SET-FOOD AT HOME EXPENDITURE SUPPORTED

STUDY AREA (FATS DOMINO & ST. CLAUDE)	Robért fresh market	IDEAL MARKET	ROUSES MARKETS	WHOLE FOODS MARKET
30,000 SQ.FT.	80,000 SQ.FT.	75,000 SQ.FT.	63,000 SQ.FT.	92,000 SQ.FT.
RISKY!				

AVERAGE HOUSEHOLD EXPENDITURES HELD CONSTANT AT $6,199.07 AND REGIONAL SALES MODEL UTILIZED AT $643 PER SQ.FT.

GROCERY INVENTORY | OPPORTUNITY SET-AVG. STORE SIZE

3 LOCATIONS
24,533 SQ.FT.

3 LOCATIONS
7,633 SQ.FT.

3 LOCATIONS
42,100 SQ.FT.

BROAD ST.
25,800 SQ.FT.

CLOSE TO STUDY AREA

SMALL FOOTPRINT = FEW SALES REQUIRED

LARGE STORE SIZE

DEMOGRAPHIC MISMATCH

GROCERY INVENTORY | OPPORTUNITY SET- AVG. STORE SIZE

	Robért fresh market	Ideal Market	Rouses Markets	Whole Foods Market
	3 LOCATIONS 24,533 SQ.FT.	3 LOCATIONS 7,633 SQ.FT.	3 LOCATIONS 42,100 SQ.FT.	BROAD ST. 25,800 SQ.FT.
ANNUAL REVENUE				
Regional Sales Model	$15.77 mil.	$4.91 mil.	$27.1 mil.	$16.59 mil.
Local Rent Model	$4.71 mil.	$1.66 mil.	$8.08 mil.	$4.95 mil.

$1.5 mil. Subsidy

$1.5 mil. as a Percentage of 1st Year Operating Gross Revenue

Regional Sales Model	9.51%	30.55%	5.54%	9.04%
Local Rent Model	31.85%	90.36%	18.56%	30.24%

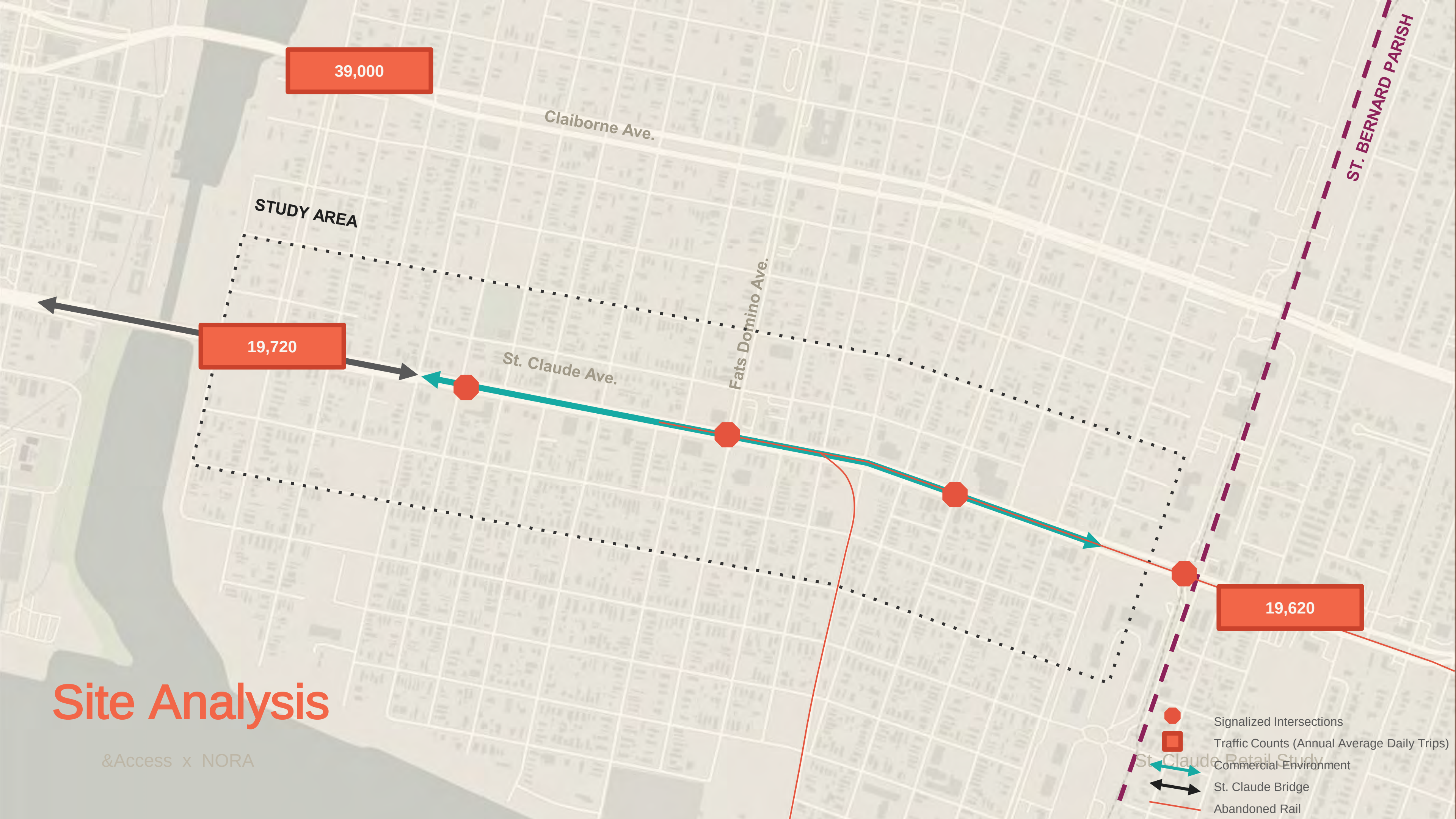
SUBSIDIZING GROCERY

- Direct cash subsidy
- Sales tax recapture/reinvestment
- Property tax abatement
- Higher market capture rate
- Residential Growth etc

KEY FINDINGS

Convenience store square footage—existing, planned, and under construction—already surpasses the retail demand for Food at Home (grocery).

Site Analysis



KEY FINDINGS

Convenience store square footage—existing, planned, and under construction—already surpasses the retail demand for Food at Home (grocery).

Claiborne Avenue presents a potentially viable alternative location for a full-service grocery store, offering potential for better accessibility and sustainability.

What are your thoughts?

KEY FINDINGS

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Claiborne Avenue presents a viable alternative location for a full-service grocery store, offering potential for better accessibility and sustainability.

Proximity matters: Depending on where you live in the neighborhood, Canseco's might still be the closest option.

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We are conducting additional analyses on Claiborne Avenue’s potential for a full-service grocery store to ensure the most strategic and sustainable investment.

Section 03

Findings

KEY FINDINGS

- Successful retail districts respond to an existing market demand
- Even the smallest amount of retail can serve as a community's commercial corridor
- It's DIFFICULT to create a vibrant, walkable commercial corridor with high vacancy
- Property and business owners experience a lack of access to capital to make improvements
- Demand for retail is evident, however site conditions (among other roadblocks) prohibit retailers from locating in the neighborhoods.

OTHER KEY FINDINGS

Catalytic Role of Food and Beverage

Multi-Developer Approach & Community Ownership

Housing as an Anchor for Retail Demand

Technical Assistance and Capacity Building

Public Realm and Streetscape

POTENTIAL FOCUS AREAS

We want to hear your thoughts…

Any questions on the research and next steps?

Section 03

Q&A

Contact Me

bboone@andaccess.com

Good Food Markets

Case Study

AndAccess studied the closure of Good Food Market in D.C., analyzing its community impact and providing strategic recommendations for future mission - driven food retailers in underserved areas.

Client: Bainum Family Foundation

Many know that east of the river there is not affordable food; having a store there is important—very important! They don't have access to healthy food, fresh food. Ward 8 has only one grocery store with high rates of chronic illness. We knew they deserve more and that they wanted more. I was very tired of individuals saying [residents] didn't want to eat healthy. SNAP benefits run out about halfway through the month. Half the WIC recipients in the city live in Ward 8, but have no where to buy items"

- Food Access Leader in DC

Start with realistic financial projections

GFM commissioned a feasibility study of the GFM Bellevue location in 2016. The study estimated annual revenues of $1.78 million to $2.39 million in the first four years of operation. By Year 4, these figures would represent 8.1% of all food-at-home expenditures by households within a half-mile radius of the site. **For context, these revenue projections were $2.4 million more than Year 4 actual revenue at GFM's Pilot store in Ward 5.**

"This is Ward 8 DC, which is one of the most underserved food deserts. It makes sense for the borrower to focus there, but the question becomes, at what point can you offer this and be profitable and scale?"

- Loan Underwriter

Need for patient capital and ongoing subsidy

Debt-based investments in small-format or community-driven food retail solutions can be an inequitable tool and may inhibit growth in areas that are already underserved. Instead, patient capital options, such as loans with deferred payment periods or redeemable equity resembling long-term debt, could be more appropriate for sustaining grocery operations.

Focus on product mix and price point for sustainability

GFM did not have a comprehensive understanding of the community's preferences and sensitivity to price and product mix. The store's offerings fell short of meeting the demands and expectations of local residents, hindering customer retention.

"I wished the product line had been different. I wasn't interested in the products."

- Ward 8 Resident