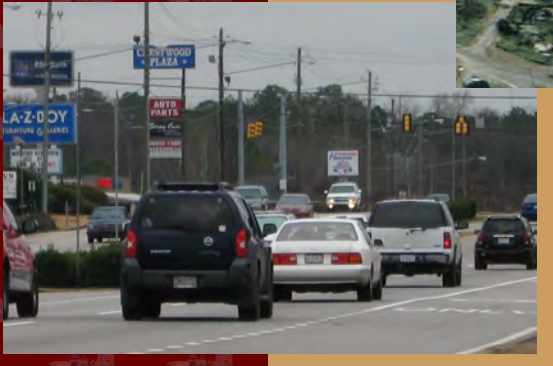
CITY OF IRONDALE
CORRIDOR STUDY
A COMMERCIAL & TRANSPORTATION ASSESSMENT OF SELECTED CORRIDORS



The Regional Planning Commission of Greater Birmingham

The University of Alabama at Birmingham, Business Analysis Laboratory

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ACKNOWLEDGEMENTS

Project Title:	City of Irondale Corridor Study
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Prepared For:	City of Irondale
Date Completed:	April 2, 2010
Special Thanks:	City of Irondale Irondale Commercial Development Board Irondale Community Development Corporation Irondale Industrial Development Authority Irondale City Planning Commission

This report was financed in part by the U.S. Department of Transportation, Federal Highway Administration, the Federal Transit Administration, the Alabama Department of Transportation, and produced by the Regional Planning Commission of Greater Birmingham, as staff to the MPO, in fulfillment of requirements set forth in Title 23 USC 134 and as amended by Public Law 109-59 SAFETEA-LU 2005. The views and opinions of the authors [or agency] expressed herein do not necessarily state or reflect those of the U. S. Department of Transportation.

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INTRODUCTION

The City of Irondale was incorporated in 1887 as a small mining and railroad community outside Birmingham and has since provided residents with an ideal place to live. Strategically located along several interstates and primary corridors, Irondale's proximity to Birmingham, the region's economic hub, continues to make it an attractive place to live. With a population nearing 12,000 and a business community of approximately 600 establishments, the City of Irondale has provided its residents with a convenient and inviting home for over 123 years. The purpose of the Irondale Corridor Study is to provide the City with recommendations to ensure the lasting success of their commercial corridors.

Scope of Work

The City of Irondale contracted with the Regional Planning Commission of Greater Birmingham (RPCGB) and the University of Alabama at Birmingham (UAB) School of Business to provide an analysis and assessment of the City's primary commercial centers and transportation corridors. Specifically, the City of Irondale desired to examine the land use and transportation issues within three important commerce areas of the City. This study assesses and reports the findings for concentric drive time areas for the three geographic target areas identified by the City. Through a comprehensive analysis of the community's economic and market demographics, input from community and business leaders, suggestions from area developers, and an inventory of existing businesses, the RPCGB will identify the most promising prospects for retail recruitment, develop a transportation plan for the City, and provide recommendations with which the City may implement the steps necessary to recondition and revitalize the commercial areas.

Commercial Assessment

The selected corridors are vital to the City in terms of existing as heavily trafficked transportation routes which function as both primary commuter arteries and gateways to and from the City, while also serving as the primary commercial retail locations for both City residents and daily travelers. In order to assess roadway improvements or changes along the corridor it is necessary to understand the current commercial uses and the market potential for the area. The identification of the areas' strengths and weaknesses is critical to determine the appropriate economic development options available to the City. The Commercial Assessment will explore various elements including jobs, job growth or decline, tax structure, economic base, existing labor force characteristics and future labor force requirements, the geographic characteristics of the area, existing businesses, and selected quality of life measures.

Inventory and Classification

All properties within the selected corridors are inventoried within a classification matrix and classified according to the North American Industrial Classification Standard (NAICS). Additionally, a comprehensive collection of historical and anticipated demographic and socioeconomic characteristics are compiled and analyzed for each market area. This market information is compared with the businesses located within each market, and an analysis and summary of the retail businesses by line of trade is reported.

Market Assessment

Utilizing the latest available source data, a market potential profile for each corridor is reported. A community wide survey of households was conducted to determine the extent of consumer shopping behavior, retail preferences, and interest in additional merchants located in the market.

Expert Panel

A review panel, consisting of representatives from the RPCGB, UAB, and local development firms, was organized to review the data collected, offer suggestions, and identify issues. Interviews with community leaders and property owners were also conducted.

INTRODUCTION

Transportation Assessment

The major corridors within the market areas provide access and visibility to the commercial centers. The connectivity, traffic volumes, and accessibility of the corridors is critical towards the success of their redevelopment. It is necessary to examine site connectivity, non-motorized access and flow between properties, motorized access between and to properties, and the opportunities to improve both. Since transportation connectivity and land use are related issues, results from the Commercial Assessment and property inventory contribute towards the Transportation Assessment and guidance towards the resulting recommendations.

Site Inventory

The same property inventory used in the Commercial Assessment is used, with the additional analysis of county parcel and property tax records, in the Transportation Assessment site inventory and classification. This inventory is used to determine site relationships and identify possible connections between sites.

Roadway Assessment

Utilizing the most recent traffic count data and traffic projections for the corridors provides a basis for examining potential improvements to the roadways. Properties located along or near the corridors generate specific levels of traffic, and inadequate access managment into or between these properties can result in a reduction of vehicle trips to these properties.

Expert Panel

The RPCGB, with input from City officials and assistance from area traffic and design professionals, organized a panel to provide input to the transportation assessment process. This panel includes representatives from the local, county, and state transportation agencies involved in the development and maintenance of the corridors.

Selected Corridors/ Commercial Locations

- Crestwood Boulevard/ US 78 Commercial

- Grants Mill Road/ Irondale Auto Mall

- Kilgore Memorial Drive/ Grants Mill Station

CRESTWOOD BOULEVARD

Corridor length: 1.5 miles

2008 traffic counts of Average Annual Weekday Traffic indicate over 20,000 vehicles utilize Crestwood Boulevard (US Highway 78) each day.

Corridor is located adjacent to Interstate 20 with high visibility and interstate access available (exit 133).

Principal corridor through Irondale with properties primarily zoned for commercial use, consisting of approximately 83 corridor frontage locations with 80% currently occupied.

Physical conditions of the corridor are adequately maintained though the general appearance is dated.

An estimated 30,000 residents live within a five minute drive of Crestwood Boulevard.

Revenue generated from this location accounts for an estimated 22% of the total retail sales tax generated in the CIty.


Source: MS Bing Maps

KILGORE MEMORIAL PARKWAY

Site location of Grants Mill Station is located between Crestwood Boulevard (US Highway 78) and Grants Mill Road, adjacent to I-20 at exit 133.

2008 traffic counts of Average Annual Weekday Traffic indicate 17,353 vehicles utilize Kilgore Memorial Parkway each day.

Shopping Center location consisting of approximately twenty-six store fronts and commercial outparcels with 30% currently occupied.

Two large, anchor stores currently lease space with six ancilliary retailers utilizing additional space. Approximately eighteen retail store fronts and commercial outparcels are available for use.

Physical conditions of the corridor are adequately maintained though the general appearance is dated and visibility is limited.

An estimated 16,760 residents live within a five minute drive of Grants Mill Station.

Revenue generated from this location accounts for an estimated 5% of the total retail sales tax generated in the CIty.


Source: MS Bing Maps

GRANTS MILL ROAD

Site location of the Irondale Auto Mall is located at the I-459/ Grants Mill Road interchange.

2008 traffic counts of Average Annual Weekday Traffic indicate about 12,500 vehicles utilize Grants Mill Road (east of I-459) each day with over 73,000 traveling I-459.

Corridor is located perpendicular to Interstate 459 at exit 27.

The Auto Mall location consists of six vehicle dealerships along southwest corner of I-459 and Grants Mill Road.

An additional 900+ acres exists adjacent to the Auto Mall for potential development.

Physical conditions of the corridor are well maintained and the area is currently experiencing positive growth trends.

An estimated 2,400 residents live within a five minute drive of the Irondale Auto Mall.

Revenue generated from this location accounts for an estimated 28% of the total retail sales tax generated in the CIty.

MARKET PROFILE

Executive Summary

With a population exceeding 12,000, Irondale is adjacent to the municipalities of Mountain Brook, Vestavia Hills, Trussville, Leeds, Hoover and other local metropolitan Birmingham communities, where retail merchants who are located in the City of Irondale have access to a broad range of consumers with considerable buying potential who could be attracted to destination retail establishments in Irondale. A destination retail establishment is one that is sufficiently unique and special in nature to attract shoppers not only from Irondale but also from other nearby communities.

This report includes both primary and secondary research, and focuses on the potential demand for retail development in the selected market areas through the identification of appropriate development options. Primary research includes information from a focus group meeting and from a survey of city employees and city residents. The focus group included retail developers that are familiar with Irondale as well as representatives from the Regional Planning Commission of Greater Birmingham and the UAB School of Business. The survey was distributed to city employees and residents of each of the city council districts. Secondary research is from the U.S. Census Bureau, Site To Do Business Online market reseach, ESRI Business Analyst Online, InfoUSA, and the Alabama Department of Transportation.

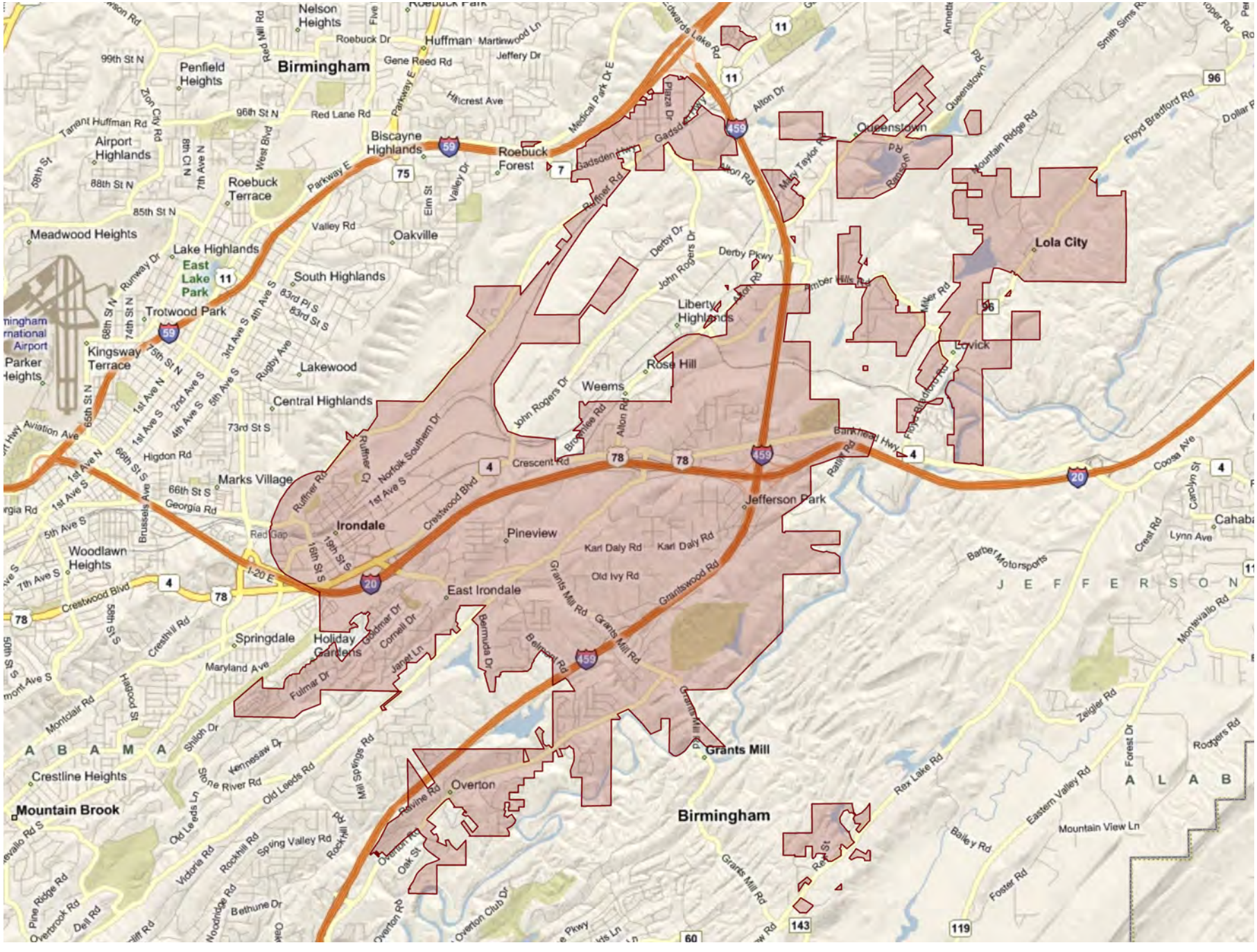
Irondale is a relatively small community which is surrounded by successful retail developments in nearby cities such as Birmingham, Trussville, and Hoover. The survey of Irondale residents indicated that 44.3% of residents spend between $1,000 and $3,000 per month on retail, yet the vast majority (76.3%) do more than half of their shopping outside of Irondale. These facts taken together indicate that while the community has good spending potential, additional retail opportunities exist for Irondale to meet the marketplace demands of its residents.

Local Market Conditions

Retail market potential is defined by the number of persons in a market who possess sufficient income to satisfy their needs for goods and services and who are willing to spend their money in local merchants' stores. The market for retail development in Irondale is dependent first upon the presence of consumers with wants and needs for products (goods and services) who have sufficient income to buy products for personal consumption and who are sufficiently confident and willing to spend their money at retail. The second factor that affects the potential for new retail development in Irondale is the existing base of competing retailers in Irondale and in surrounding communities that presently serve some of Irondale residents' retail needs and demands for good and services. Irondale is surrounded by nearby municipalities that have more modernized retail shopping venues that are easily accessible via a fairly efficient transportation infrastructure. A significant portion of Irondale residents' retail shopping is occurring outside of Irondale. The recent years losses of a Wal-Mart Discount store and a Food World grocery store, in addition to the relocations of several retailers from the City, have been damaging to the community's retail infrastructure. Even if residents prefer to shop for some common categories of goods in the Irondale community, no retailers are located within the community to meet those residents' needs. Further, Irondale shoppers are spending a significant portion of their incomes making retail purchases in surrounding municipalities and making substantial contributions through sales taxes to Jefferson County and those communities rather than to the City of Irondale.

The demographic and socioeconomic characteristics of the residents of the City of Irondale provided in this section detail the nature of the core retail market in Irondale. The trade area, illustrated on the following page, consists of all areas within the city limits. According to the most recent demographic estimates, Irondale is home to over 12,000 residents (this estimate includes

MARKET PROFILE



recent annexations). Nearly 600 businesses are located in Irondale and employment within the city is estimated to be nearly 11,000. Of these total businesses, approxmately 136 are defined as retail and service establishments and employ over 1,500 workers.

Population and Housing Characteristics

Irondale, located within Jefferson County, is in central Alabama and is part of the Birmingham-Hoover Metropolitan area. The 2008 county population is estimated to be 659,503. The 2009 metropolitan area population is 1,108,210. The metro area population has grown by 4.54% since 2000. The Birmingham-Hoover Metro Area's cost of living is 16.59% lower than the U.S. average. The following data, collected from national data vendors, extrapolates trend data in order to project estimates and changes due to annexations are added, locally known development projects, or expectations towards redevelopment, infill, or building permit trends.

Year	Population	Households
1990	10,056	3,868
2000	9,813	4,019
Average Annual Change, 1990 - 2000	-0.24%	0.38%
2009	12,065	4,969
Average Annual Change, 2000 - 2009	2.55%	2.63%
2014 (forecast)	11,860	4,881
Average Annual Change, 2009 - 2014	-0.34%	-0.35%

According to market estimates, the 2009 total population of the City of Irondale is 12,065. The population has increased by 2.55% annually since 2000, though primarily through annexations. The resident population is expected to decrease at a rate of 0.3% over the next five years to result in a population of 11,860 by 2014.

The number of households in 2009 is estimated at 4,969 and that number is projected to decrease over the next five years. The annual rate of decline is projected to be about 0.35% and by 2014 the number of households will total about 4,881.

Annual New Privately-Owned Residential Building Permits
2000 - 2008

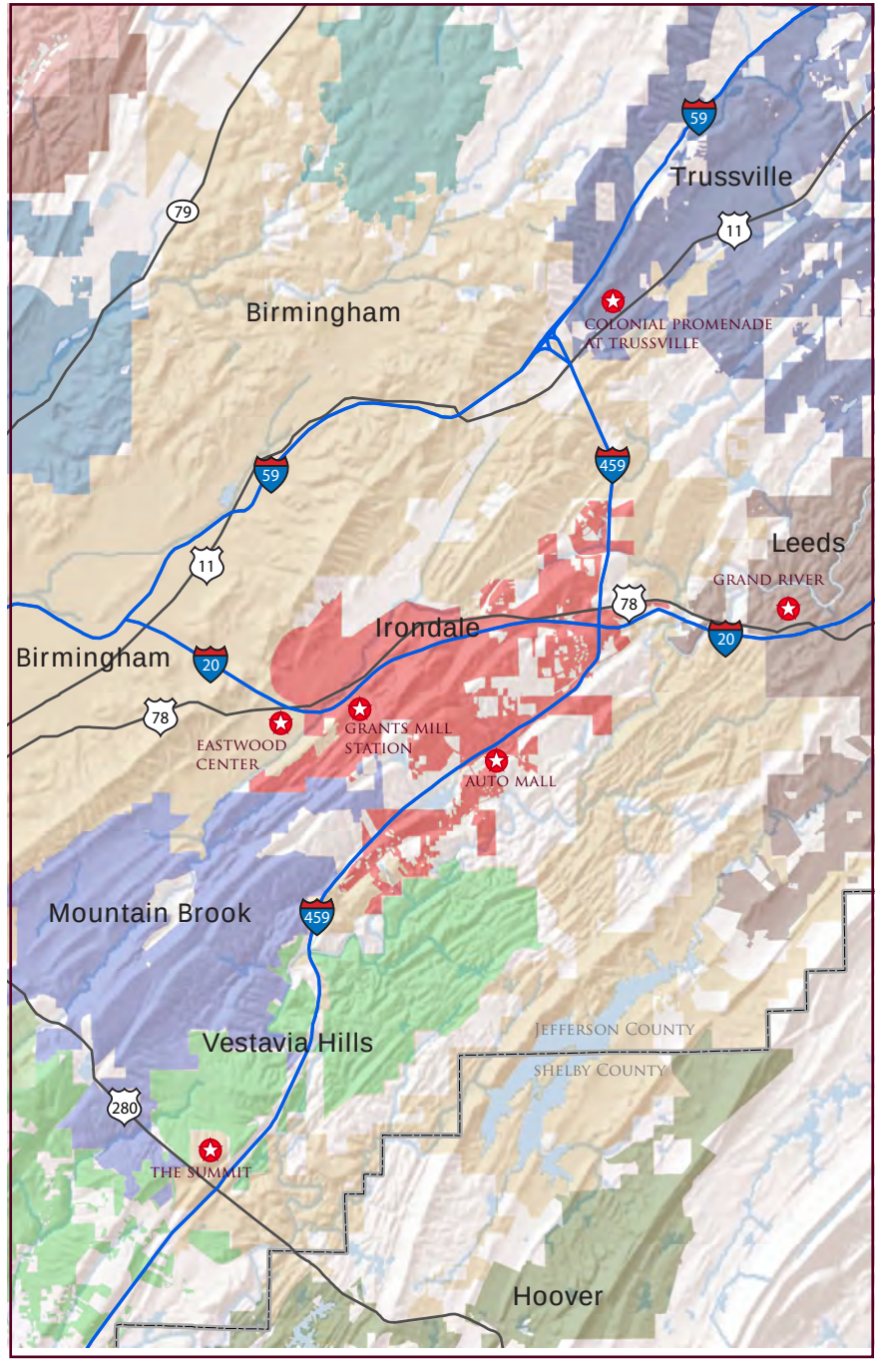
Year	Buildings	Units
2000	29	29
2001	22	22
2002	36	55
2003	17	17
2004	18	18
2005	47	47
2006	38	38
2007	25	140
2008	18	33
Annual Average	28	44

Source: US Census Bureau Building Permit Estimates Program

MARKET PROFILE

A number of municipalities are adjacent to Irondale including Leeds, Trussville, Vestavia Hills, Mountain Brook, Homewood and Hoover. The populations of these communities, including the population of Irondale, total 408,160. Residents in these communities are in close proximity to Irondale and represent significant retail development opportunities for potential Irondale retailers. Interstates 20 & 459, and US Highway 78 are among major highways that travel through Irondale. These thoroughfares are travelled by thousands of people daily as workers in Birmingham bedroom communities drive to and from work in the Birmingham area and as other travelers across the southeast drive to Birmingham or through Birmingham on to other destination cities.

Municipality	2009 Population Estimate
Birmingham	228,862
Homewood	24,637
Hoover	70,603
Irondale	12,065
Leeds	10,653
Mountain Brook	20,143
Trussville	14,856
Vestavia Hills	26,341
Total	408,160



Median Age & Age Distribution

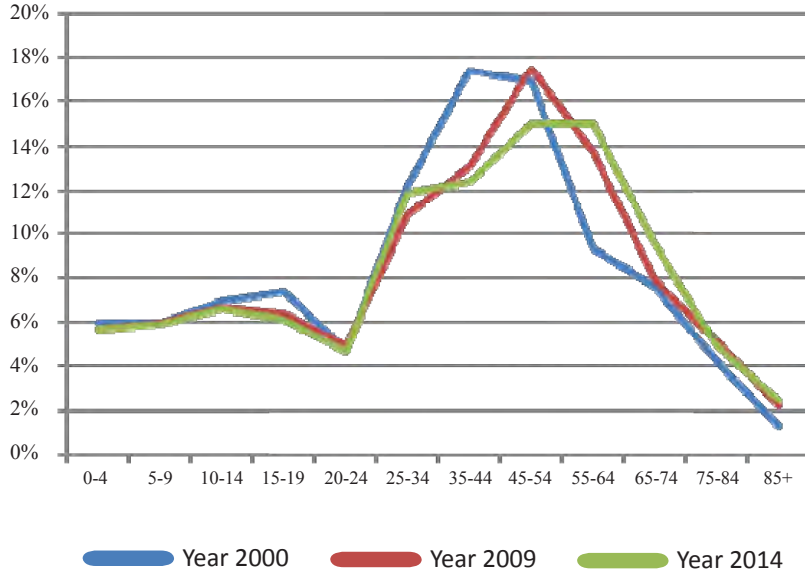
The population of Irondale is getting older on average, as is true for most of the State of Alabama and the nation. The median age in Irondale is 42.4 in 2009 and is projected to rise to 42.5 by 2014. In 2000, 39.3% of the population was 45 or older. By 2009, this number had increased to 46.2%. This is expected to remain relatively constant and approximate 46.8% by 2014.

Population by Age, 2009

Age Cohort	Percent of Population
Under 5 Years	5.7%
5 to 9 Years	6.0%
10 to 14 Years	6.7%
15 to 19 Years	6.4%
20 to 24 Years	4.9%
25 to 34 Years	10.9%
35 to 44 Years	13.1%
45 to 54 Years	17.5%
55 to 64 Years	13.7%
65 to 74 Years	7.9%
75 to 84 Years	5.1%
85 Years and Over	2.2%
18 Years and Over	77.3%
Median Age	42.4

The largest groups of persons in Irondale in the year 2000 were aged 35 to 44 years and 45 to 54 years. By 2014, the cohorts making up the largest portion of the population are projected to be those between the ages of 45 to 64 years. By 2014 the percentage of Irondale residents aged 35 to 54 will have declined significantly. If the current trends continue as expected, Irondale will have a much smaller percentage of households headed by persons aged 35 to 54 in 2014 than exists today.

Age Distribution by Year



Household Income

Household income is a vital determinant of retail market potential. There are an estimated 4,969 households in the City of Irondale in 2009 and the median household income for the market is $57,388. Average household income in Irondale is $77,427. The presence of a high percentage of households with incomes in excess of $150,000 causes the average income to be significantly greater than the median of $57,388. About 7.8% of Irondale households, more than 300, have incomes in excess of $150,000. Irondale's median household income falls within the mid-range of surrounding cities but is higher than the national averge which affords an opportunity to retailers in general.

Household & Per Capita Income, 2009

City	Median Household Income	Average Household Income	Per Capita Income
Birmingham	$31,919	$42,446	$18,083
Homewood	$52,351	$67,231	$29,780
Hoover	$69,019	$95,767	$39,792
Irondale	$57,388	$77,427	$31,563
Leeds	$42,911	$52,200	$22,127
Mountain Brook	$83,420	$130,491	$53,835
Trussville	$67,130	$78,005	$29,625
Vestavia Hills	$68,970	$103,611	$44,386
United States	$54,719	$71,437	$27,277

Household Income, Percentage Distribution by Year

City	2000	2009	2014
Less than $15,000	14.2%	10.4%	10.3%
$15,000 to $24,999	11.0%	7.1%	6.0%
$25,000 to $34,999	11.7%	10.1%	9.2%
$35,000 to $49,999	18.9%	13.9%	14.0%
$50,000 to $74,999	20.5%	24.0%	25.8%
$75,000 to $99,999	13.9%	14.1%	13.7%
$100,000 to $149,999	6.9%	12.6%	12.6%
$150,000 to $199,999	1.1%	3.5%	3.7%
$200,000 +	1.7%	4.3%	4.5%
Average Household Income	$56,770	$77,427	$80,082

According to Census data and secondary source estimates, the average household income in Irondale increased by 36% between 2000 and 2009. The projection reflects an increase of 3.4% by 2014. Though inflation rates and cost of living increases will have influences, this increase in average household income represents an increase in the disposable income available to Irondale households.

Employment Characteristics

In 2009, the number of employed residents is estimated to total 4,165. The number of individuals who work in Irondale is currently estimated to be nearly 11,000, indicating a constistancy between day time population and residential population due to employment in the City. This presents an opportunity for the City to market retail opportunities to those employees who spend substantial time in Irondale but are not residents.

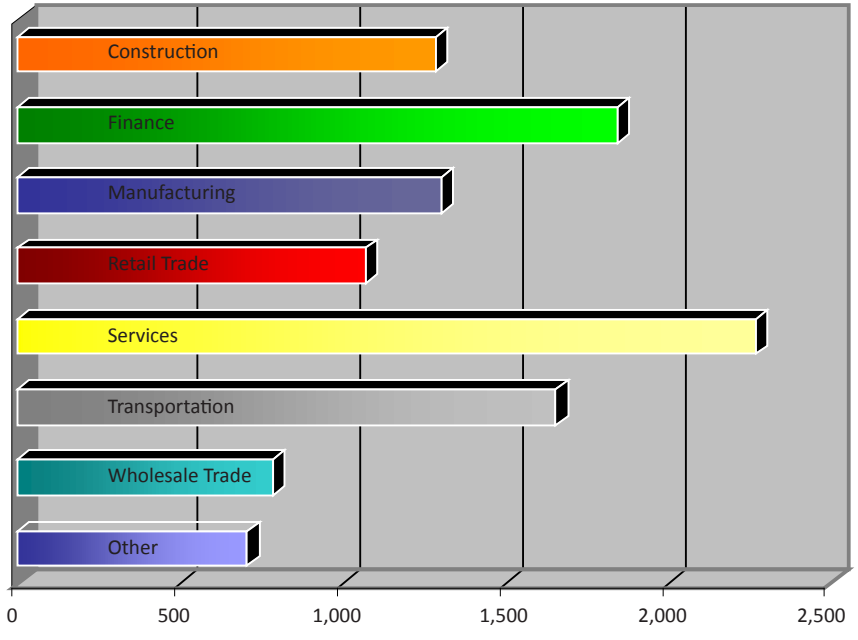
Top Employers

Company	Number of Employees
Norfolk Southern Railroad	1,200
Motion Industries	635
New South Bancshares, Inc,	400
Collateral Mortgage	300
Eternal Word Television Network	250
Imaging Business Machines, Ltd	180
Tricon Metals & Services, Inc.	150
Shades Valley High School	125
UPS Freight	125
Tom Williams BMW	102

** Employment data provided by InfoUSA, 2008.*

Irondale consists of a wide range of businesses with the Service Industry making up the largest number of jobs in Irondale, totaling an estimated 216 businesses and 2,267 employees. The Service Industry is comprised of jobs that include the professional, educational, health, food, and accommodation services. The Finance Industry, consisting of an estimated 33 businesses, provides the next largest percentage of employment with 1,843 jobs. The Transportation, Manufacturing, and Construction Industries follow with each sector employing between 1,700 and 1,200. These are followed by the Retail Industry, which is estimated at 82 businesses and employing 1,069. The graphs below illustrate the percentages of total businesses by prime industry and the percentages of total employment within the City of Irondale.

Businesses by Industry



Unemployment in the market area is 9.8%, slightly less than the national average of 10.6%. Over 90% of the civilian labor force aged 16 and over in the market area is currently employed. The civilian employment rate is expected to climb to 93.7% in the next five years. The average travel time to work for employed residents is 21.7 minutes. Half or 50 percent of the employed residents commute between 20 and 34 minutes.

MARKET CONSIDERATIONS

With a total population estimated at 12,065, Irondale has a lower population than many of its neighbors.

Irondale has the highest median age compared to its neighbors.

Irondale has the second highest percentage of owner occupied households when compared to its neighbors.

Estimates indicate the City has experienced a 36% increase in average household income since 2000.

Nearly 59% of households are reported as having an average household income of $50,000 or more.

The daytime population (employment) within the City is nearly equal to the residential population, indicating that Irondale is more than suburban-residential in function and form.

COMMERCIAL ASSESSMENT

The selected corridors are vital to the City in terms of heavily trafficked transportation routes which function as both primary commuter arteries and gateways to and from the City, while also serving as the primary commercial retail locations for both City residents and daily travelers. In order to assess roadway improvements or changes along the corridor it is necessary to understand the current commercial uses and the market potential for the area. The identification of the areas' strengths and weaknesses is critical to determine the appropriate economic development options available to the City. The Commercial Assessment will explore various elements including jobs, job growth or decline, tax structure, economic base, existing labor force characteristics and future labor force requirements, the geographic characteristics of the area, existing businesses, and selected quality of life measures.

Community Tapestry Segments

Community Tapestry data is a segmentation system created by the Environmental Systems Research Institute, Inc. (ESRI) which divides U.S. neighborhoods into 65 groups based on consumers demographic and socioeconomic data. These groups, referred to as Tapestry Segments, are sorted on the basis of over 60 characteristics which are considered to be key determinants of consumer behavior. The system is intended to help businesses target customers in specific locations by providing insight into customer spending habits, preferences, hobbies and household types. Retailers analyze a community's tapestry segment composition to determine the nature of the residents' lifestyles since those lifestyle characteristics affect spending habits at retail establishments for goods and services.

Virtually all (99.9 percent) of the residents of Irondale fall into one of the following eight Tapestry segments. These define the specific lifestyle traits of Irondale's residents. Nearly half of the Irondale population is comprised of Exurbanites and Urban Chic households whose average age is 42 to 45 and whose average household income is $87,000 to $89,000. The following chart summarizes the key attributes of the predominate Tapestry groups within Irondale. The five largest Tapestry Segments in the market area together make up 95.4% of the households in Irondale and are profiled on the following page.

Tapestry Segment Groups

Tapestry Segment	Percent of Households	Household Type	Median Income	Median Age
Exurbanites	25.0%	Married Couples	$87,339	45.1
Urban Chic	23.2%	Married Couples	$89,317	42.4
Rustbelt Retirees	20.4%	Married Couples	$52,728	45.2
Milk & Cookies	14.3%	Married Couples	$64,527	33.7
Crossroads	12.5%	Married Couples	$44,410	32.1
Heartland Communities	3.0%	Married Couples & Singles	$35,701	42.4
Senior Sun Seekers	1.4%	Married Couples & Singles	$39,138	53.1
Green Acres	0.1%	Married Couples	$64,480	40.7
Total	99.9%			

COMMERCIAL ASSESSMENT

Exurbanites

One quarter of Irondale's residents are Exurbanites. Exurbanite neighborhoods are composed of mature citizens who prefer an affluent lifestyle in open spaces located outside of urban centers. Over half of the householders are between 45 and 64 years of age. 40 percent are empty nesters and 32 percent are married with children living at home. Exurbanites are well educated and approximately half of those who work hold professional or management positions. The median home is valued at $288,301 and the median household income is $88,531. Exurbanites are very concerned with financial health. They consult with financial planners, hold well diversified portfolios, track their investments online and are well insured. Leisure activities for this group include boating, hiking, kayaking, bird watching, playing Frisbee and photography. Many participate in civic activities.

Urban Chic

Almost a quarter (23.2%) of Irondale's residents is classified by Tapestry as Urban Chic. Urban Chic residents are professionals living an affluent, urban lifestyle. The group is well educated and comprised mostly of married-couple families and singles. Most live in upscale single-family homes with a median value of $659,997. The median age is 42 years. Urban Chic residents enjoy golf, hiking, visiting museums, traveling and attending dance performances. They frequently use the internet to track investments and purchase goods and services. They like good coffee, public and talk radio and classical music. Residents tend to be civic minded and are likely to volunteer in their communities.

Rustbelt Retirees

One fifth of Irondale citizens is classified by Tapestry as Rustbelt Retirees. Rustbelt Retiree neighborhoods are occupied primarily by married couples with no children and singles that live alone. The median age is 45 years and more than 40 percent of households receive Social Security benefits. Most residents own their homes and live in single-family dwellings with a median value of $129,157. Rustbelt Retirees are proud of their homes, and unlike other retirees, not inclined to move. They enjoy playing golf, playing bingo, working crossword puzzles, going to horse races and gambling.

Milk & Cookies

Tapestry classifies 14.3% of Irondale's residents as belonging to the segment called Milk and Cookies. Residents of milk and cookies neighborhoods are primarily affluent, young, married-couple families. The median age is 34 and approximately half of the households include children. The median home value is $148,781. Most households have more than one worker and more than one child. Purchases for this group are driven largely by their children, including purchases of baby and children's products and fast food. Residents enjoy playing basketball, football, chess, backgammon and video games.

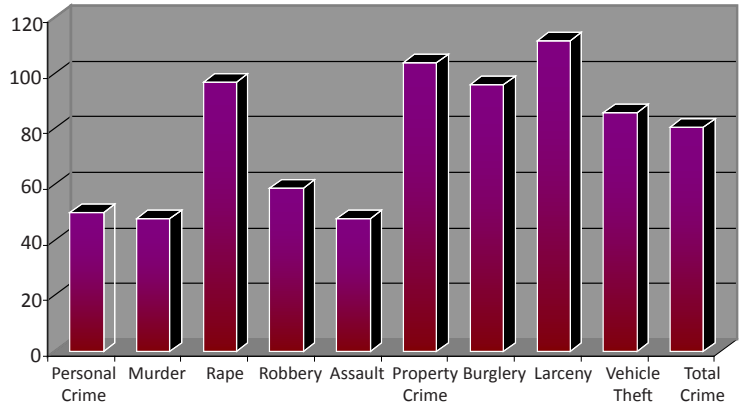
Crossroads

Tapestry classifies 12.55 of Irondale as Crossroads Communities. Crossroads Communities are comprised of married-couple and single-parent families. The median age is 32.1 years. 75 percent own homes and their median home value is $73,224. More than half of such residents live in mobile homes while 36 percent live in single-family dwellings. Crossroads residents work in construction, manufacturing, retail trade and service industries. They shop primarily at discount stores but also make frequent purchases at convenient stores. Leisure activities include fishing, attending and participating and auto racing.

Crime in Irondale

Retailers are drawn to communities that evidence low crime rates and avoid areas with high crime rates. The graph below shows that the crime rate data for the City of Irondale is very low. The Crime Index represents a series of standardized indices based on a national average of 100. A crime index of 120 indicates that the potential or tendency for a crime in the area is 20 percent above the national average. Aggregate indices for personal, property, and total crime are unweighted indices as a murder is weighted no more heavily than a purse snatching in the computation. The following are key components regarding crime in Irondale.

Crime Indexes



The total crime index in Irondale is 81 which is 19% below the national average. Crime is significantly below the national average in most categories. Only, property crime and larceny were above the national averages.

Focus Group

The UAB Business Analysis Lab held a focus group meeting on October 1, 2009. The meeting included three prominent retail developers and site analysts who are familiar with the City of Irondale, representatives from the Regional Planning Commission of Greater Birmingham, and representatives from the UAB School of Business. The key findings of the focus group are listed below.

- The Irondale community has been surrounded by very aggressive and successful retail developments. These include retail developments in Hoover, Birmingham, Trussville and an emerging development in Leeds.

- According to the developers, Irondale will be unable to rejuvenate retail developments at Crestwood Plaza until some roadway infrastructure improvements are made to improve ingress and egress. The RPCGB representatives reported that necessary changes could be made.

- Despite the competition from existing successful retail developments near Irondale, there may be an opportunity to create a narrowly defined “destination concept” at Grants Mill Station. Comparisons were made to the retail destination of Pepper Place located in the Lakeview area of Birmingham. Such a concept could complement the two major tenants there now, Southeastern Salvage and Garden Ridge, and could include show rooms for retailers who serve the building and renovation markets including specialty lighting, plumbing, construction, and related businesses.

- The properties at Grants Mill Road and I-459 adjacent to the “Auto Mall” is attractive to retail development. A plan for further development could be productive.

In addition, to discussing the various areas available for retail development in Irondale, the focus group also included discussion of more general actions which could enhance the ability of the city to attract retail development. The focus group revealed the following:

• Developers do not perceive the city as being responsive to their needs. Examples were cited which include developers requests for zoning information being treated as "unimportant" and the fact that the City of Irondale charges fees to developers to secure basic information about properties. The development of web-based platforms to provide the information necessary to do business in the city is desired, as is a catalogue of all available commercial properties.

• More diligent enforcement of the condition section of the sign ordinance would discourage dilapidated signs on businesses long closed. Dilapidated signs do not send a positive message to potential retailers. In addition, enforcement of the maintenance requirements of the International Building Code would help make properties more attractive to developers and tenants.

• Amenities such as walking trails, bike paths and street lamps would improve the community's image.

• An opportunity exists to provide access to the Ruffner Mountain Nature Preserve through Irondale. This combined with the development of walking and/or biking trails on the south side of Ruffner park could enhance quality of life for the community as well as draw traffic from surrounding areas.

Traffic Conditions

The majority of Irondale's potential consumer market travels along either I-20 or I-459. I-20 is a major East-West corridor which connects the cities of Tuscaloosa, Birmingham and Anniston in Alabama and continues east to Atlanta and west to Dallas. The City of Irondale lies on I-20 just east of Birmingham and may be accessed via exits 133, 135 or 136. The City is primarily centered around Exit 133, US-78/Kilgore Memorial Drive.

Interstate 459 provides the southern portion of a perimeter around Birmingham. Like the suburban communities of Bessemer, Hoover, Vestavia Hills, and Mountain Brook, Irondale may be accessed via I-459. The major exit located in Irondale is Exit 27, Grants Mill Road.

Businesses in Irondale have access to approximately 50,000 – 55,000 people who travel through the city via I-20. Average annual weekeday traffic is estimated at 73,810 vehicle trips through Irondale on I-459. Although this area is removed from the center of town, the high volume of travel through this section of Irondale could be beneficial to development in the I-459/Grants Mill Road area.

Irondale City Survey

A survey of Irondale city workers and residents was conducted to assess the shopping and buying patterns in and around Irondale and the opinions about new retail development opportunities, the effectiveness of Irondale city services and ordinances which affect retail development and the opinions about four selected sites where retail development is feasible. A core component of that was to determine the character and extent of Irondale residents' "out-shopping" behavior. That is, to what extent and where do Irondale's residents travel to make retail purchases. A survey was mailed to 48 employees of the City of Irondale as well as members of the city boards and city commissions. The Mayor and City Council members also distributed surveys to constituents.

A total of 59 persons responded to the survey, 33 of which are city employees and 26 of which are citizens. Thus, 55.9 percent of survey respondents are city employees, and 44.1 percent are citizens. The accompanying bullets provide information regarding the demographics of survey respondents. Additional survey tables can be found in the Appendix.

- 61% of survey respondents were male. 39% were female.

- The typical age group of survey participants was 45 to 54.

- Of those that responded to the survey, 89.8% were white, 8.5% were African-American and 1.7% indicated that they would "prefer not to say."

- A sizeable majority, 76.3%, of those responding to the survey are married.

- The median income of survey respondents is between $60,000 and $74,999.

According to the survey results, 54% of respondents spend between $1,000 and $3,000 per month on retail purchases. Additionally, 76.3% of respondents indicated doing more than half of their retail spending outside of Irondale. Only 1.7% of respondents believe that they do less than 10% of their shopping outside of Irondale.

The survey also asked participants how much per month they spend in various communities surrounding Irondale. The results below are based on a scale of 1 to 5, with 1 indicating that they spend no money in the given location and 5 indicating that they spend $401 or more.

- 44.5% of those responding indicated that they spend $100 or less per month in Irondale.

- Over 53% of survey respondents report spending more than $300 per month in Birmingham. Of those that responded, 39.7% spend $401 or more.

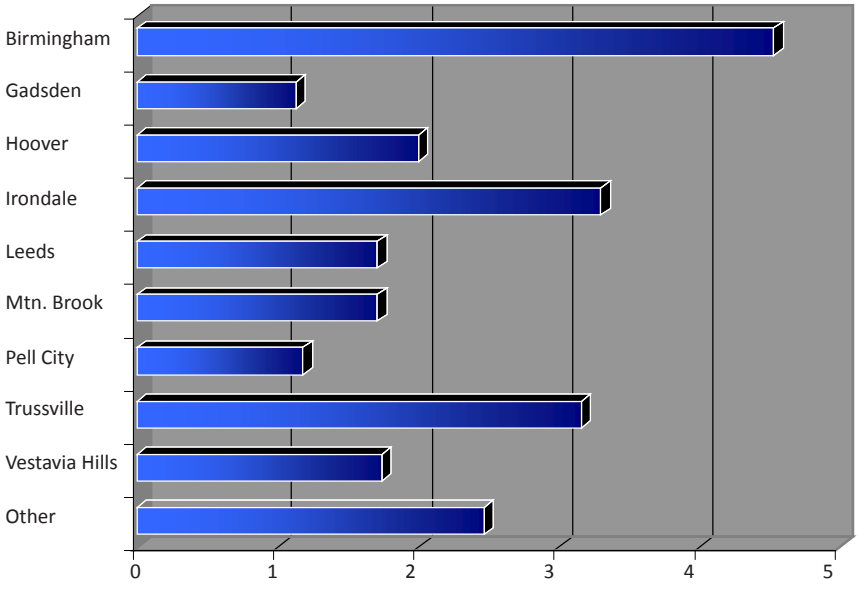
- Most respondents reported doing some retail shopping in Trussville. 54.9% of those responding indicated spending more than $100 per month in Trussville.

- Survey responses indicate that Irondale residents do very little shopping in Hoover and Leeds. Of those that responded to this series of questions, over 78.1% spend $100 or less per month in Hoover. Over 88% spend $100 or less per month in Leeds.

- Respondents report very little spending activity in Mountain Brook and Vestavia. Of those answering, 51.2% report no spending in Mountain Brook and 36.6% report spending less than $100 per month. Similarly, 54.8% of those answering report no spending in Vestavia and 28.6% report spending less than $100.

- Few reported retail spending in Gadsden or Pell City.

Retail Spending



Retail Spending by Community	
Birmingham	4.53
Gadsden	1.13
Hoover	2.00
Irondale	3.30
Leeds	1.71
Mountain Brook	1.71
Pell City	1.18
Trussville	3.16
Vestavia Hills	1.74
Other	2.47

Response Scale:

1 None
2 $ 100 or Less
3 $101 to $200
4 $201 to $300
5 $401 or More

Opinions on New Retail

This portion of the survey sought to gauge residents' desire for improved retail offerings in the City of Irondale. This section provided an opportunity for respondents to provide basic information on how frequently they eat out in restaurants located outside of Irondale and how much they typically spend when eating out. These questions did not consider week-day lunches. Additional tables associated with this section can be found in the Appendix.

• When asked if they would spend more in Irondale if there were better retailers in the community 94.8% of those who responded indicated they would shop much more if retail offerings were better. Only 3.4% indicated that they would not change their shopping habits if there were better opportunities for retail shopping in Irondale.

• Of those who responded, 70.2% of respondents indicated that they eat in restaurants outside of Irondale one to three times per week.

• 44.8% of those responding indicated that they spend between $26 and $50 when they dine out.

Restaurant Spending

Spending	Respondents	Percent
$25 or Less	16	27.6%
$26 to $50	26	44.8%
$51 to $75	14	24.1%
$76 to $100	2	3.4%

Retail Preferences

This section of the survey also provided an opportunity for respondents to indicate how interested they are in having new retail in Irondale in a variety of categories including Fast Food Restaurants, Midscale Dining, High End Dining, Grocery, Sporting Goods, Pharmacy, and Clothing. Respondents were asked to rate their interest in new retail in each category as either "Very High Interest," "High Interest," "Some Interest," "Little Interest," or "No Interest." Additional tables associated with this section can be found in the Appendix.

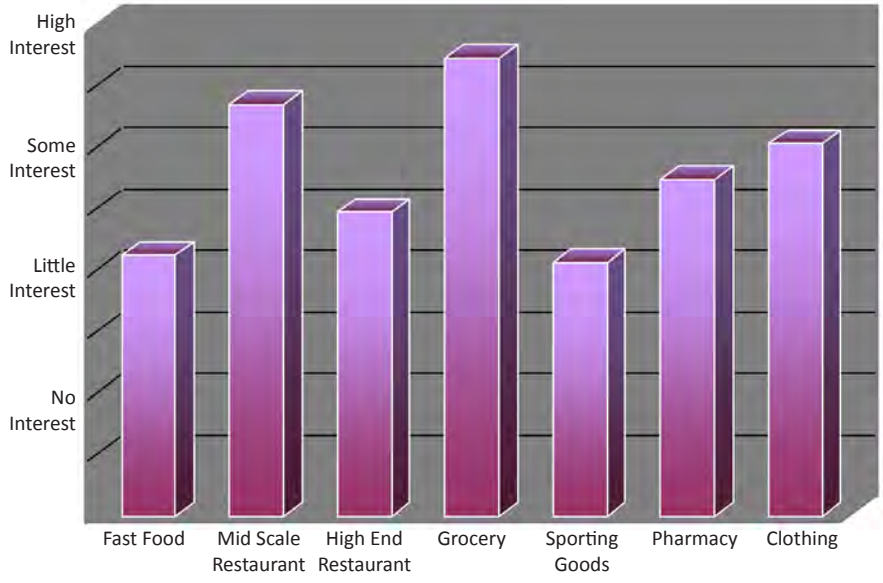
• Respondents were the most interested in having new grocery, mid-scale dining and clothing retailers.

• 84.5% of survey respondents indicated that they have "very high interest" in having a new grocery retailer located in Irondale. When asked what type of store they would most like to attract to Irondale, 82.5% indicated grocery. Survey results combined with the current lack of grocery stores in the city indicate that the potential for new grocery retail in the area is good.

• 50% of those who answered this portion of the survey indicated that their interest in mid-scale dining is "very high" and 35.7% indicated that their interest is "high." Thus, 85.7% of respondents are extremely interested in new mid-scale dining opportunities and the opportunities for development in this area may be good.

• Of those responding, 50.9% indicated that they have "very high interest" in new clothing retail in Irondale. 17.5% indicated that their interest in this area is "high." Despite high interest in this area, it will be extremely difficult for Irondale to compete with the numerous successful clothing retailers in the surrounding communities.

Interest by Retail Type



Type	Median Score
Fast Food	2.13
Mid Scale Restaurant	3.36
High End Restaurant	2.48
Grocery	3.74
Sporting Goods	2.07
Pharmacy	2.75
Clothing	3.04

Response Scale:

1 No Interest
2 Little Interest
3 Some Interest
4 High Interest
5 Very High Interest

Retail Location Preferences

Additionally, the survey provided the opportunity for respondants to indicate the level of retail potential along the four identified market areas of this report. The first site is property off I-459 in the area of the "Auto Mall." The second location is the Grants Mill Station Shopping Center, where Southeastern Salvage is located. The third site is on US-78/Crestwood Boulevard in the former Food World Shopping Center. The final site is at the intersection of 16th Street and US-78, where Habitat for Humanity and PetSmart are currently located. Survey participants were asked to rate the potential at the sites on a scale of one to five, with one indicating "very low" potential and five indicating "very high" potential. Additional tables associated with this section can be found in the Appendix.

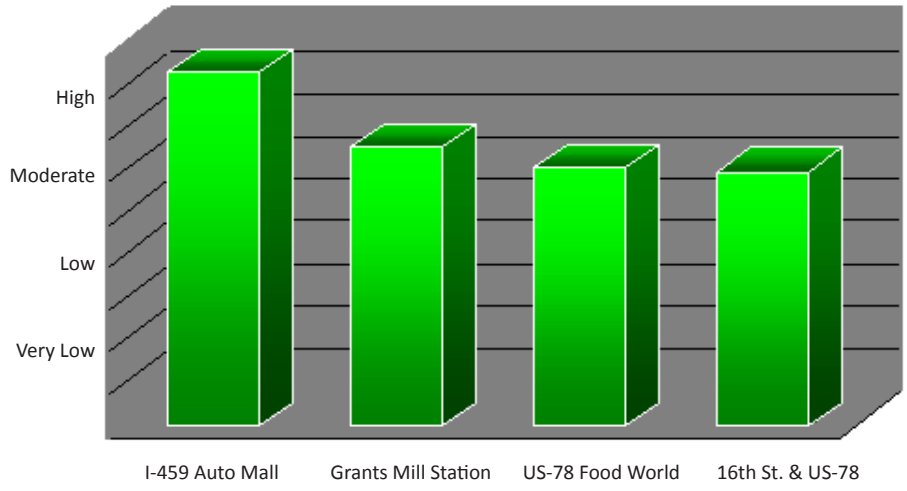
- Respondents perceived the potential at the auto mall location to be the highest of the four locations. Grants Mill Station was considered to have the next best potential.

- Of those who responded, 50% indicated that they believe the potential for retail development at the Auto Mall is "very high" and another 25.9% believe it to be high.

- 49.2% of respondents indicated that they believe the Grants Mill Station site has "high" potential and an additional 8.5% indicated that they believe it has "very high" potential.

- Survey respondents judged the retail potential of the site at the intersection of 16th Street and US-78 to be the lowest of the four sites. Only 32.8% of respondents indicated that they believe this site has "very high" or "high" potential.

Retail Location Preference



Location	Median Score
I-459 Auto Mall	4.17
Grants Mill Station	3.29
US-78 Food World	3.05
16th Street & US-78	3.00

Response Scale:

1 Very Low
2 Low
3 Moderate
4 High
5 Very High

Perceptions of City Services for Development

This section intended to gauge survey participants' views regarding the appropriateness of Irondale city services and ordinances that affect retail development. The City's responsiveness and ability to provide information on properties as well as the effectiveness of City ordinances and policies have a substantial impact on the type and quality of development that may occur.

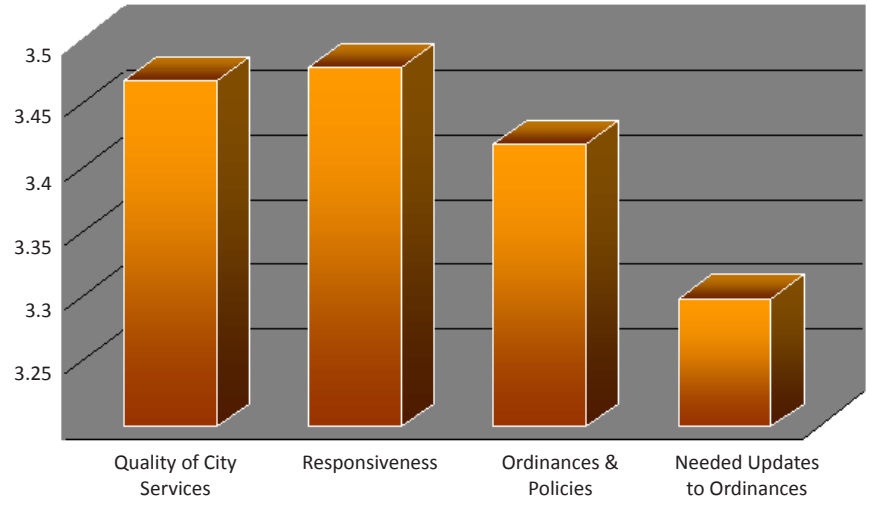
• When asked their opinion of the quality of city services and organizations in Irondale that are essential for commercial property developers to evaluate and develop commercial property in Irondale 48.3% of survey respondents indicated that they believe the quality to be good. However, only 12.1% of respondents believed the quality to be excellent.

• When asked how responsive the City of Irondale is to the requests and needs of developers only 13.5% of those who answered indicated that the city is highly responsive. 44.2% of those responding indicated that they believe the City is "reasonably responsive."

• 47.2% of those responding indicated that they believe the City's ordinances and policies regarding property maintenance and signage to be "good." Only 9.4% of those who responded believed them to be "excellent."

• While 55.4% of those responding indicated that they "don't know" if existing ordinances should be changed or new ordinances adopted to improve commercial property maintenance and signage, 32.1% indicated that they believe they should be changed.

Perceptions of City Services



Issue	Response Score
Quality of City Services	3.47
Responsiveness to Needs	3.48
Ordinances & Policies	3.42
Needed Updates to Ordinances	3.30

Response Scale:

1 Very Low
2 Low
3 Moderate
4 High
5 Very High

SURVEY CONSIDERATIONS

The median income of survey respondents is between $60,000 and $74,999.

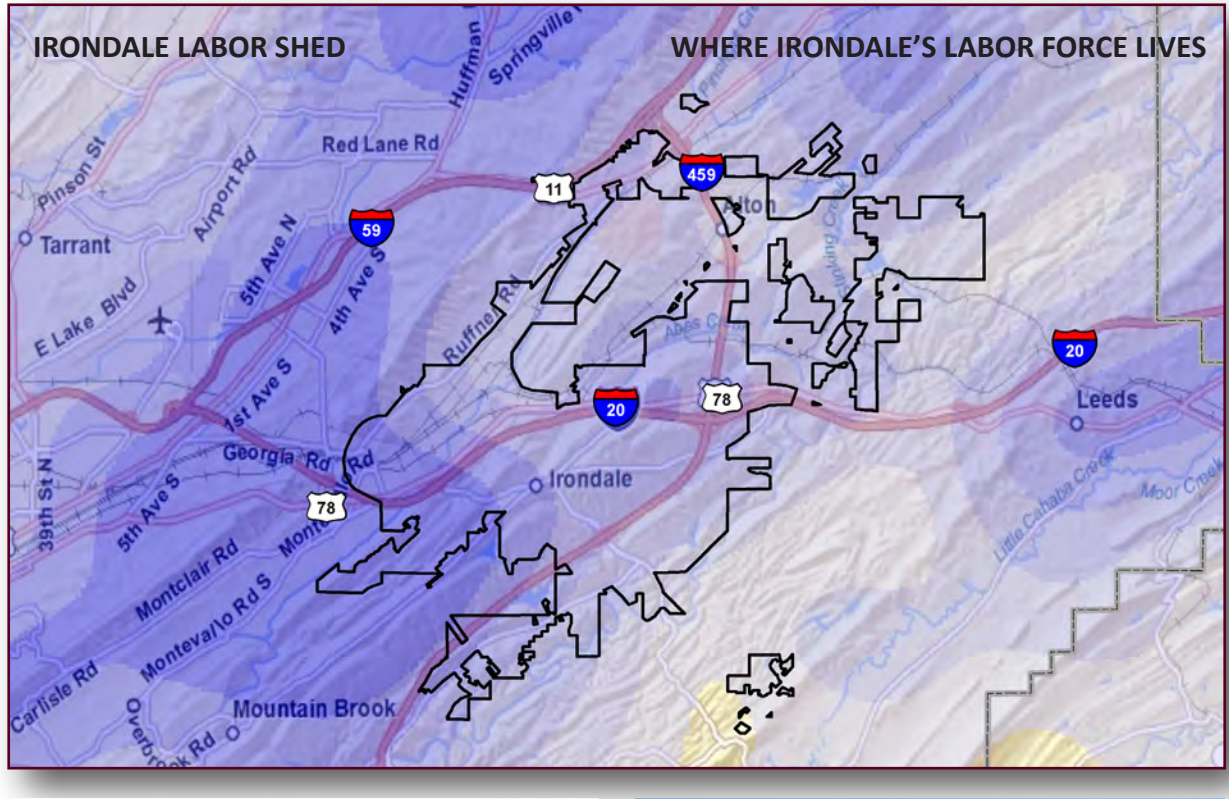
44.5% of those responding indicated that they spend $100 or less per month in Irondale.

94.8% of those surveyed indicated they would shop more in Irondale if additional retail establishments were available.

Respondents indicated highest interest in additional grocery, mid-scale dining and clothing retailers.

Location preferences among respondants indicate the locations off of I-459 near the Auto Mall and the Grants Mill Station Shopping Center as having the greatest appeal for new retail locations.

Survey data combined with the comments of developers at the focus group indicate that the City could improve its responsiveness to the needs of developers. It also indicates that an analysis of existing ordinances regarding property maintenance and signage could lead to further improvements which would make the area more appealing to development.



Spending Potential Index

Expenditure data may be used to reveal what level of Irondale residents' discretionary income they are willing to allot to different products or services and/or what prices they are willing to pay. The Spending Potential Index (SPI) is a measure of market activity that is based on actual dollars spent on particular goods and services. An SPI equal to 100 indicates that households are buying or spending at a rate equal to the "national average." A SPI above 100 indicates that households are buying/spending above the national average while a SPI below 100 indicates that they are buying/spending less than the national average.

SPI data for Irondale indicates that residents are spending slightly above the national average for the majority of goods/services. The data indicates that reasonably priced goods and services, priced near or slightly above the national average would potentially be attractive to these households.

Spending Potential Index, 2007

Merchandise/ Service Category	Spending Potential Index
Apparel & Services	
Men's	72
Women's	68
Children	78
Footwear	51
Watches & Jewelry	111
Apparel Products & Services	165
Computers	
Home Computer & Hardware	109
Home Software & Accessories	112

Merchandise/ Service Category	Spending Potential Index
Entertainment & Recreation	
Fees & Admissions	116
Membership Fees	117
Participant Sports Fees	119
Admission to Movies/ Theatre/ Ballet	111
Admission to Sporting Events	117
Recreational Lessons Fees	118
Dating Services	94
TV/ Video/ Sound Equipment	
Community Antenna or Cable TV	105
Televisions	113
VCRs/ Video Cameras/ DVD	106
Video Cassettes & DVDs	104
Video Game Hardware & Software	104
Satellite Dishes	105
Video Cassettes & DVD Rental	105
Sreaming/ Download Video	111
Sound Equipment	105
Rental & Repair of TV/ Radio	108
Pets	130
Toys & Games	106
Recreational Vehicles & Fees	111
Sports/ Recreation/ Exercise Equipment	85
Photo Equipment & Supplies	111
Reading	112
Food	

Spending Potential Index, 2007 (cont.)

Merchandise/ Service Category	Spending Potential Index
Food at Home	
Bakery & Cereal Products	106
Meal/ Poultry/ Fish/ Eggs	105
Dairy Products	105
Fruits & Vegetables	107
Snacks & Other Foods at Home	106
Food Away from Home	
Alcoholic Beverages	107
Nonalcoholic Beverages at Home	105
Financial	
Investments	120
Vehicle Loans	106
Health	
Nonpresciption Drugs	105
Presciption Drugs	109
Eyeglasses & Contact Lenses	111
Home	
Mortgage Payment & Basics	119
Maintenance/ Remodeling Services	123
Maintenance/ Remodeling Materials	116
Utilities/ Fuel/ Public Services	106
Household Furnishings	
Household Textiles	113
Furniture	114

Merchandise/ Service Category	Spending Potential Index
Floor Coverings	117
Major Appliances	113
Housewares	91
Small Appliances	110
Luggage	116
Telephones & Accessories	62
Household Operations	
Child Care	107
Lawn & Gardens	115
Moving/ Storage/ Freight Express	111
Housekeeping Supplies	108
Insurance	
Owners & Renters Insurance	115
Vehicle Insurance	108
Life/ Other Insurance	113
Health Insurance	110
Personal Care Products	108
School Books & Supplies	101
Smoking Products	96
Transportation	
Vehicle Purchases	109
Gasoline & Motor Oil	105
Vehicle Maintenance & Repairs	109
Travel	
Airline Fares	118
Lodging on Trips	117
Auto/ Truck/ Van Rental	120

Retail Market Demand Analysis

This section of the report provides information on the potential market demand for retail in the City and the extent to which Irondale residents are spending retail dollars outside of Irondale. Because retail spending provides value to the community beyond the economic value to retail businesses, identifying whether or not retail dollars stay in the area is key to facilitating growth.

Retail market activity can be measured by the supply of existing retail and potential demand from the marketplace. The North American Industry Classification System (NAICS) defines industry sectors. The data presented in this section of the report compares retail supply and demand among the industry sectors as defined by NAICS.

Retail demand, or retail sales potential, is the amount of spending that residents in the trade area spend on retail goods and services. The critical issue is whether or not retailers in the trade area capture all of residents' spending. If not, residents shop in other areas which is defined as retail leakage. If retail outlets in the trade area capture revenue above the amount spent by residents, then they are attracting shoppers from a broader area, and are said to have "in-shopping" within the trade area. This is due to either consumers from surrounding communities shopping in the trade area or commuters traveling through the trade area stopping to shop.

Estimates of the amounts expected to be spent by residents of the trade area on various retail goods and services are used to determine retail demand data. Retail supply is based on estimates of actual retail sales for businesses in the trade area. The difference between retail supply and retail demand determines the amount of retail leakage outside the trade area as well as the amount of surplus retail within the trade area. If demand exceeds supply, a leakage of sales out of the trade area occurs. A surplus of retail sales occurs when customers are drawn on from outside the trade area, which signifies a lack of additional retail opportunities within that specific type of business. A retail leakage indicates that a potential market exists for that particular business while a retail sales surplus indicates market saturation for that particular type of business.

The data indicates that there is an overall surplus of retail spending in the City of Irondale. Retail spending in Irondale exceeds the residents' retail spending potential by $36 million. About half of that total, over $18 million, occurs due to the Auto Mall. This result is indicative of consumers living outside the City spending money on retail goods and services in Irondale. This surplus, however, does not broadly paint the City as exceeding its retail potential, but rather that the City currently enjoys a retail consumer draw, particularly within the auto industry (Auto Mall) and clothing industry (Sam's Club).

COMMERCIAL ASSESSMENT

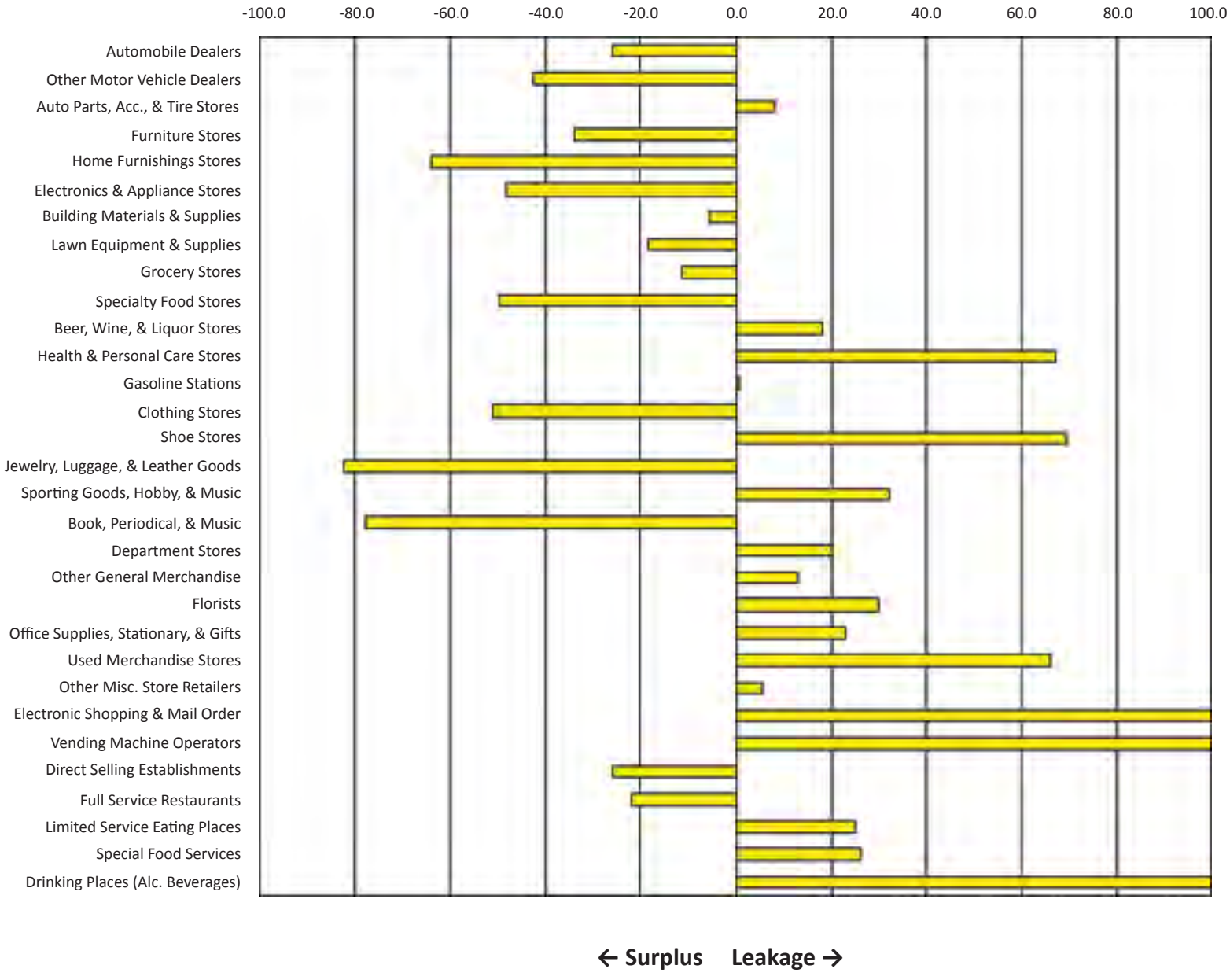
Existing Retail Supply/ Demand Balance, 2009

NAICS	Demand	Supply	Leakage (Surplus)
Motor Vehicle & Parts Dealers	$25,509,671	$43,618,824	($18,109,154)
Furniture & Home Furnishings	$3,520,173	$9,658,932	($6,138,759)
Electronics & Appliance Stores	$2,433,820	$7,003,331	($4,569,511)
Building Materials/ Garden Equipment/ Supply Stores	$4,356,274	$4,951,703	($595,429)
Food & Beverage Stores	$19,128,169	$24,213,812	($5,085,643)
Health & Personal Care Stores	$3,080,455	$601,927	$2,478,528
Gasoline Stations	$15,575,723	$15,299,824	$275,899
Clothing & Clothing Accessory Stores	$4,480,161	$16,414,510	($11,934,349)
Sporting Goods/ Hobby/ Book/ Music Stores	$1,156,153	$5,169,813	($4,040,660)
General Merchandise Stores	$16,097,903	$11,329,065	$4,768,838
Miscellaneous Stores	$1,584,291	$940,012	$644,279
Nonstore Retailers	$4,003,558	$2,194,274	$1,809,284
Food Service & Drinking Places	$18,121,265	$13,615,531	$4,405,734

The retail market demand assessment of the City of Irondale, which compares primary retail industry activity (retail sales) in a given market area with the determined retail potential (market disposable income and consumer behavior), identifies the Irondale market as having more retail opportunities within the retail industry groups including General Merchandise, Food Service, and Health and Personal Care establishments. As shown above, Motor Vehicle and Clothing establishments indicate a surplus of activity. This indicator should not be interpreted that additional establishments within these industry groups would not be successful; only that the retail activity of these establishments attract consumers from outside the market area, and that the retail activity of these establishments outpaces the retail potential of the market area. A more detailed table of these retail industry groups with associated sub-industries is available in the Appendix of this report.

COMMERCIAL ASSESSMENT

Leakage - Surplus by Industry Group



COMMERCIAL ASSESSMENT

Industry Analysis

A "leakage" of about $11.65 million from Irondale to surrounding communities is being made annually in the General Merchandise, Food Service and Drinking and Health and Personal Care retail categories. At 4 percent, sales tax revenues would rise by $466,000 annually if these sales were made in Irondale rather than in surrounding communities.

General Merchandise	$4,768,838
Food Service and Drinking	$4,405,734
Health and Personal Care	$2,478,528
Total	$11,653,100

There is a $2.1 million surplus of full-service restaurants in Irondale, however, a category in Irondale for which there is considerable demand for additional retailers is limited-service eating. There is a leakage or shortage of $4.4 million in limited-service eating establishments. Limited-service establishments primarily provide food services where patrons generally order or select items and pay before eating. Most establishments do not have waiter/waitress service, but some provide limited service, such as cooking to order (i.e., per special request), bringing food to seated customers, or providing off-site delivery. Examples of these are delicatessen restaurants, pizza delivery shops, family restaurants, takeout eating places, fast-food restaurants, takeout sandwich shops and limited-service pizza parlors.

Another area for which there is a significant shortage of retail establishments in Irondale is in the General Merchandise Store category. These include department and discount store retailers. Irondale City residents spend about $16.1 million in department stores of varying types but about $4.8 million (nearly 30%) is spent in stores of this type outside of Irondale.

Health and Personal Care spending is another category in which Irondale is significantly under-stored. Industries in the Health and Personal Care Stores subsector retail health and personal care merchandise from fixed point-of-sale locations. Establishments in this subsector are characterized principally by the products they retail and some health and personal care stores may have specialized staff trained in dealing with the products. Examples include pharmacies like CVS and Walgreens, health supplement stores, and convalescent supply stores. Staff may include pharmacists, opticians, and other professionals engaged in retailing, advising customers, and/or fitting the product sold to the customer's needs. Total Irondale spending in these stores exceeds $3 million annually. But, only about $602,000 of that spending takes place in Irondale. Almost $2.5 million annually is made by Irondale residents in other nearby communities.

Surplus/ Leakage in Surrounding Communities

An analysis was conducted to compare the industry statistics of Irondale with those of its neighboring communities in order to better identify retail opportunity gaps which Irondale can fill. The information is intended to provide an overview of the demand potential of the surrounding areas. Emphasis is given to those areas where surplus and leakage is the greatest.

• City of Birmingham - The City of Birmingham has a surplus in almost every category, indicating that it is attracting sales from other areas across the spectrum of goods and services offered. The only leakage occurs in the categories of Jewelry, Luggage, and Leather Goods Stores and Special Food Services. Retail developments such as the Summit and Eastwood Center provide a wide range of retail goods and services in proximity of Irondale at a scale where there is little room for competition.

COMMERCIAL ASSESSMENT

• City of Homewood - Homewood has large surpluses in each of the categories pertaining to furniture and home goods, as well those categories pertaining to home construction, building materials and lawn care. The City also has sizeable surpluses in most food store and restaurant categories. Categories in which they are losing business to other areas include Automobile Dealers, Gasoline, Electronic Shopping & Mail Order Houses, and Vending Machine Operators. Brookwood Mall and the Soho development create the largest retail draw into the area.

• City of Hoover - Hoover has sizeable surpluses in each of the Clothing and Clothing Accessories Stores categories as well as each of the Sporting Goods, Hobby, Book, and Music Stores categories, indicating that shoppers from other areas are purchasing these items in Hoover. The retail developments primarily competing for shoppers outside their market area include the Riverchase Galleria and Patton Creek. Noteworthy shortages (leakage) in Hoover include Other Motor Vehicle Dealers (non-automobile), Florists, Special Food Services, and Drinking Places—Alcoholic Beverages.

• City of Leeds - Data indicates that the City of Leeds does not have any Shoe Stores, Book, Periodical, and Music Stores or Nonstore Retailers; thus, there is complete leakage in these areas. The Grand River Outlet Mall, however, is expected to provide a wide range of space to various retailers within the clothing industry sector. The City has large surpluses in the areas of Home Furnishings Stores and Sporting Goods/Hobby/Musical Instrument Stores.

• City of Mountain Brook - Mountain Brook is losing sales to surrounding areas in each of the Furniture & Home Furnishings Stores Categories as well as Building Material and Supplies Dealers. Interestingly, the city's largest surplus was in the area of Lawn and Garden Equipment and Supplies Stores. The City also has leakage in all Motor Vehicle & Parts Dealers categories.

• The City of Trussville - With the Colonial Promenade development, Trussville has a surplus in the majority of retail categories, and is assumed to be doing a good job of attracting sales from outside areas. Notable exceptions include Specialty Food Stores; Beer, Wine, and Liquor Stores, Special Food Services, and Drinking Places—Alcoholic Beverages, where there is substantial leakage of sales to outside areas.

• The City of Vestavia Hills - Vestavia Hills appears to be losing sales to outside areas in the vast majority of categories. Leakage is particularly large in the areas of Other Motor Vehicle Dealers (non-automobile), Building Material and Supplies Dealers, Shoe Stores, Electronic Shopping and Mail Order Houses and Vending Machine Operators. Notable surpluses include Automobile Dealers and Lawn & Garden Equipment and Supplies Stores.

Conclusions

The points listed below represent opportunities which arose as a result of the Retail Market Analysis, the focus group and/or the survey.

1. There is clear need and desire for a grocery store within the City of Irondale. As previously documented, the survey indicates that this is the type of retail which residents desire most. While the demand analysis indicated a small surplus in this area, it is likely due to the presence of Sam's Club which serves a different market than a traditional grocery store. The most logical location for a grocery store is the former Food World location on Crestwood Boulevard/US-78.

2. The Auto Mall area is a good candidate for mid scale dining offerings. The survey indicated both that residents desire additional mid scale dining opportunities and believe the auto mall area has excellent development potential. As documented in the Traffic Counts section, there is substantial traffic along this section of I-459. Restaurants in this area could target thru-traffic and shoppers at the auto mall as well as residents of nearby communities such as Liberty Park.

3. Improvements to the ingress and egress of the shopping center at the intersection of 16th Street and US-78 (the current location of Habitat for Humanity and Super Petz and the former location of Goldbro Jewelers) are necessary to make this area palatable for developers. If improvements were made, the site could be a good location for a pharmacy such as CVS, Walgreens or Rite-Aid or a discount merchandiser such as Dollar General or Freds. As noted earlier, there is substantial potential for additional retail in the areas of Health and Personal Care and General Merchandise.

4. The potential exists to create a destination shopping area at Grants Mill Station centered around home construction, renovation and décor. Tenants would be specialty stores focusing on these areas. While there is presently a small surplus in the areas of buildings materials and supplies dealers in the area, a grouping of such specialty stores would likely draw considerable out-shoppers. Survey respondents viewed this area as having considerable retail potential and developers in the focus group responded positively to the idea of such destination shopping at this location.

Recommendations

A thorough analysis of the ways in which the City interacts with developers and of both the quality and enforcement of ordinances pertaining to property maintenance and signage could lead to improvements which would make the City much more appealing to developers. The focus group indicated that developers do not perceive the City as being particularly responsive to their needs and believe the City needs better ordinances regarding property maintenance and signage. Most survey respondents (even City employees) indicated room for improvement in these areas.

The City should consider creating an access point to Ruffner Mountain and market the area to hikers and outdoor enthusiasts. This is desirable from a quality of life standpoint and while it is difficult to assess its impact on retail, it would likely have a positive (although minimal) impact.

Basic improvements in lighting, street signs and landscaping to make the community more visually appealing would be well received by potential developers and residents alike.

TRANSPORTATION ASSESSMENT

The Transportation Assessment is an evaluation of the selected corridors, including the physical aspects and characteristics of the roadways, intersections, and traffic volumes in relation to the selected commercial sites (projects) located along the corridors. This section additionally evaluates the connectivity, accessibility and condition of the commercial sites, especially as they relate to their physical locations and contributions towards revenue generation within the City. Recommendations for improvements in relation to access management, site visibility, property usage, and general aesthetics are provided in terms of prioritization and cost effectiveness to the City.

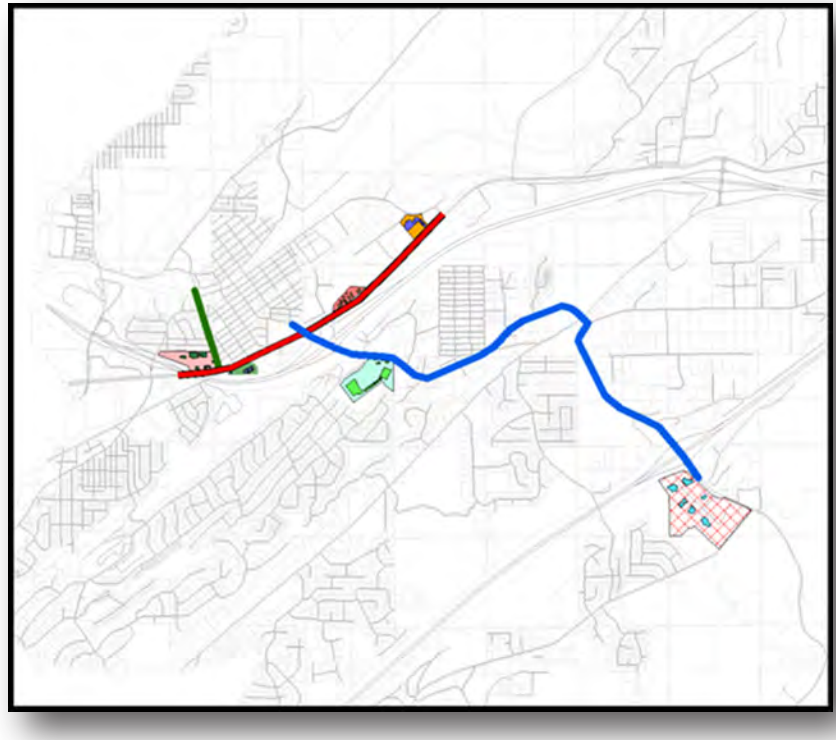
Site Inventory

The major corridors within the market areas provide access and visibility to the commercial centers. The connectivity, traffic volumes, and accessibility of the corridors are critical towards the success of their redevelopment. It is necessary to examine site connectivity, non-motorized access and flow between properties, motorized access between and to properties, and the opportunities to improve both. Since transportation connectivity and land use are related issues, results from the Commercial Assessment and property inventory contribute towards the Transportation Assessment and guidance towards the resulting recommendations.

In the assessment of commercial opportunities for the City of Irondale the study team examined the attributes of six sites in the City. These six sites represent nearly 94 acres of real estate in the City of Irondale available for development or redevelopment. The premise for the approach was to consider the sites as individual “projects”. The second step evaluated their current revenue stream, condition and use. The third step involved an assessment of the improvements necessary to raise the market potential of these sites. The results of the evaluation are a strategic recommendation of the improvements necessary to elevate the income steam of the projects.

If the City of Irondale intends to invest in improvements that will enhance the projects there is reason to consider the current income stream, the cost of improvements for a project, the potential disruption to that revenue stream and the marketing required to take that project to a higher level of revenue production.

Site Assessment Overview



Development Districts
The six development districts and their descriptions are:

1. Goldbro Site - 9 acres and 8 parcels
2. Hamburger Heaven Site - 3 acres and 2 parcels
3. Siesta Motel Site - 5 acres and 3 parcels
4. Food World Site - 8 acres and 2 parcels
5. Grants Mill Station - 25 acres and 5 parcels
6. Irondale Auto Mall - 40 acres and 4 parcels

Revenue Rankings
The ranking of the six sites is based on their current revenue generating capabilities. The actual dollar amounts were not disclosed and the sites were ranked simply from 1 to 6.

1. Irondale Auto Mall
2. Grants Mill Station
3. Goldbro Site
4. Siesta Motel Site
5. Hamburger Heaven Site
6. Food World Site

The overall ranking of all criteria is below.

Criteria	Irondale Auto Mall	Grants Mill Station	Goldbro Site	Siesta Motel Site	Hamburger Heaven Site	Food World Site
Revenue Ranking	1	2	3	4	5	6
Accessibility	1	2	6	5	4	3
Cost to Improve	6	5	2	1	4	3
Condition	1	2	4	6	5	3

Irondale Auto Mall Project

The Auto Mall's revenue generating ability puts it in the top project site for the City of Irondale. It is certainly the number one producer of revenue for the City. The location along I-459 is highly visible and access to the property is excellent. All public facilities are available on the site.

There is approximately 34 useable acres on the site for additional development on this well maintained project site. Its current use as automobile retail sales does not preclude other complementary uses. It requires little, if any, infrastructure for expansion.

The Shopping Center Group (http://www.theshoppingcentergroup.com) is currently marketing this site and the market offering indicates that the property owner is willing to subdivide the property.

Grants Mill Station Project

Grants Mill Station's revenue generating ability puts it in the second spot for this assessment. Its location along I-20 is visible for eastbound traffic and access to the property is excellent. All public facilities are available on the site.

There is approximately 33,000 sq ft of useable space on the project site for additional development. This project requires little, if any, infrastructure for expansion. The parking availability is excellent for this site.

The major tenants, Southeastern Salvage and Garden Ridge outdraw the typical 1, 3, and 5-mile market area. Potential tenants for this site would be any suppliers in the home remodeling business. The market team and the property owner identified Northern Tools and Equipment as a potential tenant (http://www.northerntool.com). They currently have 5 stores in Georgia and 6 stores in Tennessee. Alabama would be an expansion location for this retailer.

The Centro Properties Group (http://www.centroprop.com) is currently marketing this site. In discussions with Centro representatives, we recognized that they may be high on their rental rates considering the location and current economy. Their main request from the City was for a single point of contact for all zoning requests.

Goldbro Project

The number three spot for revenue is the project identified as the Goldbro site. There are 8 tenants on the site. The site faces immense handicaps. It is virtually blocked from any visibility along Interstate 20, and there are multiple access points to each site lending an air of confusion to the consumer.

The site itself lacks any aesthetic improvements and is generally uninviting. There is no access from 16th street and the specter of the I-20 roadbed overhead makes for an uninviting gateway into the site.

Siesta Motel Project

The number four spot for revenue is the project identified as the Siesta Motel project. The revenue generator for this district is the Golden Rule Bar-B-Q and Grill. It is certainly a community name, well established, and carries the reputation as the "South's Most Famous Bar-B-Q". This site has excellent visibility from both Interstate 20, and US 78. It is also the most challenged site aesthetically.

The 6 acre site backs up to Shades Creek and is immediately adjacent to the floodplain. In its current configuration the improving of any interconnections between sites is impossible.

Hamburger Heaven Project

The fifth site in terms of revenue generating is the Hamburger Heaven site. The very successful Hamburger Heaven operation occupies approximately 1.2 of the nearly 5 acres site. The predominant existing structures are up against the Interstate right-of-way. This site, like the Goldbro site, does not have clearly defined access points to the properties and is lacking any aesthetic improvements.

The outlying oil change location does nothing to enhance the viability of the site. This site suffers the most from the lack of access definition.

Food World Project

The number six site for revenue is the project identified as the Food world site. The project is actually two separate parcels of land, each with separate ownership. The property is reasonably well maintained, has a traffic signal, and the site itself is well apportioned with landscaping. Its visibility is somewhat hampered since all buildings are well below the grade of the adjacent property. There is tenant signage but it is tired and needs to be refreshed.

The Food World site recently changed hands for a reported sale price of $5.00 per square foot.

There are 8 current tenants with only three tenants generating sales tax, the balance of the tenants are only paying for a City of Irondale business license.

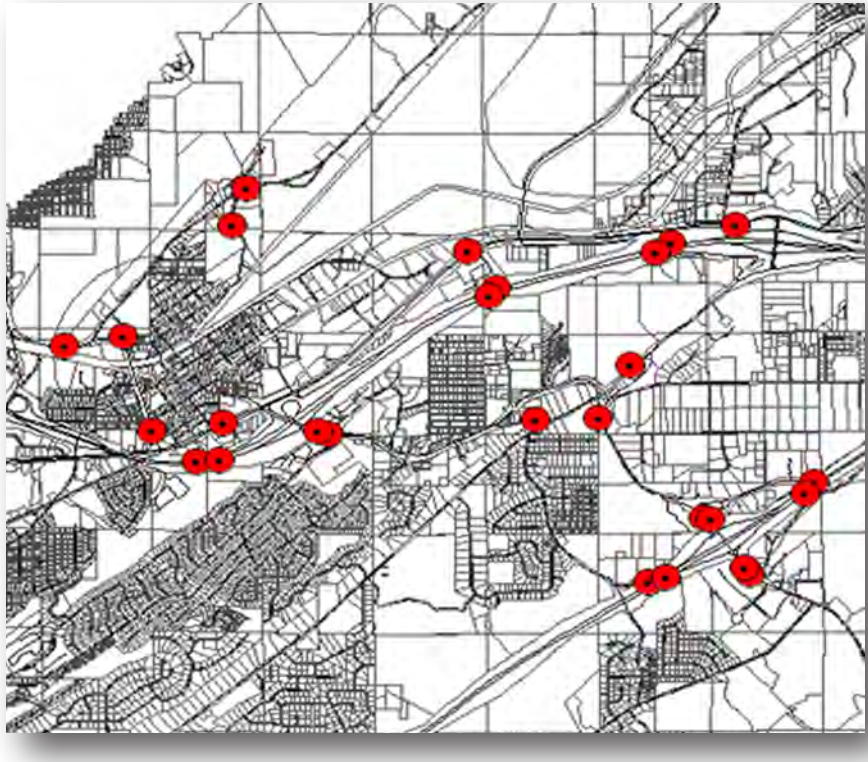
Roadway Assessment

Irondale's primary consumer market travels along either I-20/US-78 or I-459. I-20 is a major East-West corridor, which connects the cities of Tuscaloosa, Birmingham and Anniston in Alabama and continues east to Atlanta and west to Dallas. The city of Irondale lies on I-20 just east of Birmingham and may be accessed via exits 133, 135 or 136. Crestwood Boulevard /US-78 run parallel to I-20 in Irondale.

Interstate 459 provides the southern portion of a perimeter around Birmingham. Like the suburban communities of Bessemer, Hoover, Vestavia Hills, and Mountain Brook, Irondale may be accessed via I-459. The only exit located in Irondale is Exit 27, Grants Mill Road. The table below shows traffic count data collection points along I-20 and I-459.

Businesses in Irondale have access to over 75,000 vehicles, which travel through the city via I-20/US-78. Average annual weekday traffic is estimated at 73,000 vehicle trips through Irondale on I-459. Although this area is removed from the center of town, the high volume of traffic through this section of Irondale could be beneficial to development in the I-459/Grants Mill Road area.

The following table illustrates the changing traffic volumes along selected count stations over the last several years. As shown, traffic has decreased slightly in the last year at all five stations. The most substantial drop occurred at station 132A on I-459, where there was a decrease of over 5,000 cars (78,600 in 2007 to 73,460 in 2008). Traffic on US- 78 through Irondale has also declined over the last four years.



Selected Traffic Counts

Site Number	Description	AADT
Site 1	16th Street S, between 5th Ave South and Monticello Rd.	3,623
Site 2	16th Street N, between 2nd Ave North and Ruffner Rd.	660
Site 3	Georgia Road, West of Ruffner Road	2,386
Site 4	2nd Ave North , South of Ruffner Road	745
Site 5	Ruffner Road, East of 2nd Ave North	2,010
Site 6	Kilgore Memorial Drive Northbound, East of Beacon Drive	6,982
Site 7	Kilgore Memorial Drive Southbound, West of Beacon Drive	10,371
Site 8	Grants Mill Road, West of Old Leeds Road	11,465
Site 9	Old Leeds Road, East of Grants Mill Road	4,799
Site 10	Grants Mill Road (CR 146), East of Old Leeds Road	9,561
Site 11	Grants Mill Road, Southbound, West of I-459	5,102
Site 12	Grants' Mill Road, Northbound, West of I-459	5,443
Site 13	Grants' Mill Road, Southbound, East of I-459	6,148
Site 14	Grants' Mill Road, Northbound, East of I-459	6,432
Site 15	Crestwood Boulevard, East of 19th Street South	21,030
Site 16	I-20 Westbound, Exit 133	27,230
Site 17	I-20 Eastbound, Exit 133	27,230
Site 18	Crestwood Boulevard, West of John Rodgers Drive	10,500
Site 19	I -20 Westbound, West of Exit, 135	26,935
Site 20	I -20 Eastbound, West of Exit, 135	26,935
Site 21	I -20 Westbound East of Exit 135	34,180
Site 22	I -20 Eastbound East of Exit 135	34,180
Site 23	Crestwood Boulevard, East of Alton Road	7,750
Site 24	I -459 Southbound, North of Grants Mill Road	36,730
Site 25	I -459 Northbound, North of Grants Mill Road	36,730
Site 26	I -459 Southbound, South of Grants Mill Road	37,080
Site 27	I -459 Northbound, South of Grants Mill Road	37,080

While traffic has declined on I-20, US-78 and I-459, the traffic numbers are still respectable. Pleasantly, there is no danger of traffic congestion along the major routes in the City of Irondale. The challenges to the six projects in Irondale are competition, access and identification. There is no need to pursue capacity projects within the City of Irondale, now or in the near future. In fact, in at least one project site a narrowing of the roadway is a potential action.

Site Improvements

As noted earlier, the challenges to the six projects in Irondale are competition, access and identification. Remedies for the 6 projects vary in intensity. In developing the site improvement recommendations, we considered the current revenue generated per project area and the estimated cost of preparing the site to improve both its access and marketability.

Irondale Auto Mall Project

This project site needs nothing, with the exception of an additional revenue venue. It has access, it has visibility and it has available land. There is an expressed desire to continue to add auto-centric businesses to the site. We are recommending engaging the site owners to investigate the possibility of a restaurant on the site.

The foot print of the entire parcel would be approximately 55,000 sq ft with a building footprint of approximately 8,000 sq ft. This fits within the parameters of national chains. One such example would be Tucanos Brazilian Grill. Tucanos is a unique type of restaurant—very family friendly and very value-oriented and provides a unique dining experience. Tucanos is looking for sites with a population in excess of 400,000 within a 20 minute drive time and an average household income of $65,000 and above. This site is within range, having a population of 366,000 within a 20-minute drive. The site does fall short on median family income. The 20-minute drive time of this site has a median income of $43,000 for the 20-minute drive time. The site could attract the attention of a chain similar to Tucanos playing off the 74,000 AADT, the proximity of Liberty Park and Mountain Book and certainly the cache of being collocated with sales of premier auto lines.


Source: MS Bing Maps

Food World Project

When considering improvements for this project, the inherent site constraints were a prime consideration. Access to the site is excellent, it is a signalized intersection, and the entrance driveway has adequate throat depth. The buildings does sit in a hole and nothing can eliminate that aspect of the site. The site visibility can be improved, however.

Removing the overgrown landscaping and removing the tall pines at the eastern end of the site can open the property up to the view of the traffic on US-78 and I-20. Alternative plants and shrubs can be used to enhance the frontage.

The City should work with both property owners to offer incentives for landscaping the site, and changing the multitenant sign that serves the property would add further improvement.

Grants Mill Station Project

This site has ample empty space. The entire property has 226,837 sq ft of space within approximately 20 units. Garden Ridge and Southeastern Salvage occupy 184,000 sq ft. After minor tenants, there is 34,000 sq ft available for lease. This is another property that the addition of landscaping and visual improvements would enhance its position.

Building on the attraction factor of Garden Ridge and Southeastern Salvage is a logical strategy for this site. The industry has seen the advance of so-called lifestyle centers. Lifestyle centers are mixed-used commercial development that combines the traditional retail functions of a shopping mall but with leisure amenities oriented towards consumers to create a destination. Accomplishing this at Grants Mill Station is not out of the question. Minor zoning changes, increased density and the addition of “streets” on this site could bring about the desired change.

In this case, it would be a lifestyle center geared toward the home improvement niche. A reinvented Grants Mill Station could include a Harbor Freight Salvage (www.harborfreightusa.com) or Northern Tools and Equipment (http://www.northerntool.com) as tenants. These sites could be joined with a Kohler Retail store and a True Value Hardware (http://www.truevalue.com) store.

Like all of these efforts, this will require active city participation and a realistic rent structure on the part of Centro Properties Group.

Goldbro Project

As the number three site for revenue, this site will require significant investment to improve its location. Access to the site is confusing, ill defined and unattractive.

Site improvements would include closing most of the entrances along Crestwood Boulevard and leaving a Right In/Right Out Access mid block. This is complemented by the construction of a new entrance on 16th Street in line with 5th Avenue South.

Traffic counts on 16th Street are only 3,600 AADT. Preliminary discussion with ALDOT indicate no perceivable issues with eliminating the free flow left turn lane from 16th Street to Crestwood Boulevard. Both southbound lanes on 16th Street should be maintained and an additional right turn lane added between 5th Ave South and Crestwood Boulevard. Both northbound lanes on 16th Street should be maintained. The free flow right turn lane should be reclaimed and a portion retained for the right turn movement from Crestwood Boulevard westbound to 16th Street northbound. The northbound 16th Street lanes should narrow to provide a sufficient left turn bay for traffic entering the Goldbro site.

16th Street northbound, near the new entrance, should go on a road diet and shrink to two lanes. This will have the desired effect of slowing traffic near the Irondale Community School. This would also provide a bicycling opportunity along 16th Street and provide a means of connecting the school with the parks and the rear entrance to Ruffner Mountain Nature Center. The connection with Ruffner Mountain, the Goldbro site and the Community School are long term supportive activities.

There are multiple landscaping opportunities along 16th Street. From Montevallo Road north to 2nd Avenue north can be included in the theme that ties the park to the corridor. This also provides an excellent gateway opportunity to downtown Irondale.

Hamburger Heaven Project

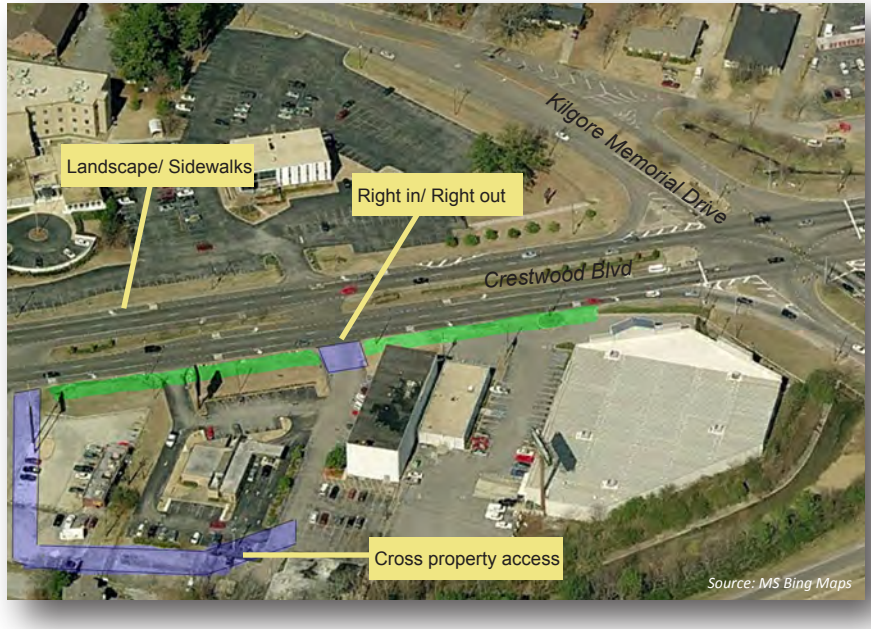
The fifth site, in terms of revenue generating, is the Hamburger Heaven site, which suffers the same shortcomings as the Goldbro site in that access is confusing, ill defined and unattractive.

Irondale has done a tremendous job of greening the medians and more importantly maintaining those improvements. This site, with cross property access, can be interconnected and the sidewalks and landscaping can renew that hometown feel along Crestwood Boulevard.

The sidewalks and landscaping along Crestwood Boulevard are improvements that can be accomplished in stages. A series of projects along Crestwood Boulevard between I-20 and Kilgore Memorial Drive can be planned and built with City forces over time. These improvements will provide an incentive when the City negotiates with property owners for cross property access between parcels. These concepts will likely be met with some resistance from property owners and the City will need to provide improvement incentives to gain acceptance.

These types of access management and visual improvements are crucial to tying the corridor together and providing synergy between sites.

It would be consistent to consider these same concepts in the area between the Waffle House and Kilgore Memorial Drive.



Siesta Motel Project

This project is the number four spot for revenue generation but the most problematic in terms of solutions and certainly one of the most challenging in terms of aesthetic value. Access solutions are severely limited by topography and effectively incompatible land uses. Aligning the access to Golden Rule with the median break and defining the entrance with landscaping that has a vertical element would improve the identification of the site.

The long-term solutions to this site will most certainly be the product of a redevelopment project. The project ranks last in terms of improvement priorities for strategic actions by the City.

The one improvement that could be initiated and expected to have long-term benefits for the City is advancing the concept of a greenway / multiuse trail along Shades Creek. A project of this type would provide pedestrian connectivity between the adjacent light industrial areas; the trail should also provide a pedestrian bridge connection between the Golden Rule site and the properties fronting on 28th Street.

The City should not pursue this project as a federal aid project. It should undertake this project with City forces and consider it a long-term municipal improvement.

The long-term prospects for this site could include either suburban office or multi-family. It is certainly a highly visible site but its relatively small size will require a rather intense and dense use to offer profitability. The City role in future development will be site assembly and infrastructure amenities.

SUMMARY OF RECOMMENDATIONS

Assessment Summary

The Commercial and Transportation Assessments analyzed the retail uses and market potential of selected areas and their relation to the physical aspects and characteristics of the roadways, intersections and traffic volumes. The examination of elements such as jobs, job growth or decline, tax structure, economic base, existing labor force characteristics, as well as the general geographic characteristics of the areas including existing businesses along with site connectivity, accessibility, and condition are vital to the identification of the areas' strengths and weaknesses which are critical to determination of appropriate economic development strategies available to the City. A summary of the recommendations are as follows:

Grocery Establishment

While there is an identified desire for a grocery store within the City of Irondale, market conditions indicate that too much direct competition exists for a traditional grocer to establish themselves. However, through City incentives and the identification of a speciality grocery store that would not have to compete with Eastwood Center, an appropriate location is the former Food World location on Crestwood Boulevard/US-78 or near Kilgore Memorial Drive, with site improvements.

General Corridor Enhancement

Basic improvements in lighting, street signs and landscaping to make the community more visually appealing would be well received by potential developers and residents alike. The active enforcement of the property maintenance element of the International Building Code (Section 303) contains strong provisions for property maintenance.

Gateway Enhancement

Prior to the improvements at the Goldbro site, it is highly recommended that the City undertake a cleanup and landscaping initiative of the area under the I-20 bridge. ALDOT has indicated that this is possible. The City would assume the maintenance responsibility.

Permissible lighting may be attached to the sub structure to light the area under the I-20 Bridge. LED lighting is recommended, is has a whiter light, uses less energy, and has a longer life. Expect this to take some time since it is out of the usual course of business for ALDOT, but it can be accomplished.

Utilize Ruffner Mountain

Establishing an access point to Ruffner Mountain to market the area to hikers and outdoor enthusiasts would help provide a destination area. This would serve as a tourism draw as well as providing an increase to the quality of life for the residents. Though it is difficult to assess its impact on retail, it would likely have a positive (although minimal) impact.

Sidewalks and Trails

It is recommended the City develop a plan for sidewalk construction and trail building. The Resource section of this plan identifies a comprehensive list of web based retail information. Sidewalks, greenways and trails enhance property values. However, the use of federal funds is time consuming, expensive and delays implementation. The cost of engineering a federal aid sidewalk project can build ¾ of a mile of sidewalk.

Dedicated Recuiter

The City of Irondale should establish a position for a business information manager. Such a position would serve as a single point of contact for all business related questions, coordinate efforts with the Commercial Development Board and Chamber of Commerce, and establish a resource center for the distribution of site materials in order to market available sites. It is recommended the City utilize their website to distribute marketing materials.

SUMMARY OF RECOMMENDATIONS

Develop Fact Sheets

Information consisting of basic demographics and market data, as well as detailed information on store sizes, site availability, and contact information for both the property owner and the City should be collected in the form of fact sheets or brochures. These sheets should be available both as print and electronic media. The sheets should give an indication of any incentives the City might consider. Any potential incentive such flexible zoning, increased density, sales tax rebates or infrastructure improvements should be discussed in general terms. RPC can work with the City and the property owner on these efforts.

City Ordinances

A thorough analysis of the ways in which the City interacts with developers and of both the quality and enforcement of ordinances pertaining to property maintenance and signage could lead to improvements which would make the City much more appealing to developers. The focus group indicated that developers do not perceive the City as being particularly responsive to their needs and believe the City needs updated ordinances regarding property maintenance and signage. Most survey respondents (even City employees) indicated room for improvement in these areas.

Retail Destination/ Lifestyle Center

Through the creation of a unique retail experience or the development of a mixed-use center (or both), Irondale can create a destination place that appeals to consumers by providing them a variety of shopping opportunities. Grants Mill Station, already possessing the anchors of Garden Ridge and Southeastern Salvage, has the potential to market itself as a niche retail destination if other similar but non-competing businesses locate there to become a one-stop construction and home improvement center. Suggested retailers include Harbor Frieght, Northern Tools, as well as paint and lighting retailers.

Reinvestment

It is recommended that the City reinvestment newly generated retail sales tax revenue into other site improvement efforts. Continued improvement will serve to increase appeal to additional retailers and generate interest for prospective businesses looking to relocate or expand business.

Resources

	Web Site	Benefits	Cost	Comments
Commercial IQ	www.commercialiq.com	Search 2x more listings (compared to "their" free membership), explore demographics and market statistics (average asking prices, closing prices etc), match listing, general property marketing tools.	Full Membership: $420.00	This site has little coverage of properties in the outlining counties.
Tenant Search	www.tenantsearch.com	Find who is in charge of the tenant's real estate for your market, and how to reach them. Find out where the chain is seeking new store locations, and its existing markets. Find out what the retailer's space, property type, demographic, co-tenancy and lease requirements are updated daily.	Tenant Search: National/ Online Version Only: $369 Tenant Search: South Region/Online Version Only: $289	This site would be a great supplement to STDB Online, and Loopnet. Based on the services that the RPCGB plans to provide for regional municipalities, it is recommended that the "Regional Online" version of Tenant Search be subscribed to.
U.S. Retail Centers	http://usretailcenters.com	U. S. Retail Centers works closely with a data/intelligence partner, Experian and their Consumer Research Division Experian is the world's largest provider of information on demographics and household segmentation, consumer spending and site or location planning intelligence. Experian will allow you to: Evaluate a specific site in a center or retail area to determine its suitability for a retail concept.	Registering as a basic member of the site is free, however each report (retail synergy reports, trade are lifestyle report, media usage marketing report, service industry sales report, trade area demographic repot, retail sales by store type report, etc) are available for purchase.	The above reports for the most part are included as part of the annual subscription to STDB Online and RPCGB can provide those reports. This is an alternative to STDB Online.

Resources

	Web Site	Benefits	Cost	Comments
CoStar Group	www.costar.com	Thai site provides a good list of available properties in Jefferson and Shelby County. Provides comprehensive information for real estate professionals seeking to track market trends, identify true buyers, find tenant information, track growth rates, etc.	Costs information provided only in exchange for personal contact information.	This site Provides a good list of available properties in Jefferson and Shelby County. Provides comprehensive information for real estate professionals seeking to track market trends, identify true buyers, find tenant information, track growth rates, etc.
Storetrax	www.storetrax.com	Free search site. Limited to searchable content in Jefferson and Shelby County; one has the ability to develop a “search agent”; provides great benefits for commercial real estate clients looking for a comprehensive property listing service.	Free	Little to no content of use for the outlining counties of Blount, Chilton, St. Claire, and Walker.
CIMLS	www.cimls.com	Basic Membership: View all property listings, saved searches emailed weekly. Gold Membership: View all property listings, add property listings, saved searches emailed daily, “listing services”.	Basic: Free Gold Membership: $241 yr ($1 first month, and $20 month after)	Though this is a very comprehensive resource for locating contact information for leasing agents and shopping center’s, it will not serve the RPCGB well when it comes time to search for properties outside of Jefferson and Shelby counties.

RESOURCES

Resources

	Web Site	Benefits	Cost	Comments
Loopnet	www.loopnet.com	Great comprehensive service for real estate professionals seeking very broad exposure for their listings, access to leads, and advanced marketing and searching tools. Premium Membership Searchers: Provides access to unlimited searching access, professional quality reports, and advanced searching and interactive mapping tools.	Professionals: $659.40 yr Premium Membership Searchers: $359.40 yr	
STDB Online	www.stdbonline.com	Professional: Professional Plus: Provides access to over 100 reports and maps and unlimited access to the following databases and maps: Tapestry Lifestyle Segmentation Workforce Strategies Crime Risk Enhanced Site Map.	Professional Plus: $1095	RPCGB is a member of STDB Online.

The effectiveness of any particular retail website's service is only as valid as the availability of space for leasein a particular shopping center. If the shopping center is 100% occupied then no statistical information would be readily available online. Futhermore, no single website contained a comprehensive list of basic information regarding shopping centers - which is the basis for developing this Shopping Center Directory. In addition, an effective website source today may not hold the same effectiveness six months from now due to varying vacancy rates of shopping centers.

APPENDIX

IRONDALE SURVEY RESPONSE TABLES

RESPONSANT RESULTS

AGE GROUP

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	25 to 34	7	11.9	11.9	11.9
	35 to 44	5	8.5	8.5	20.3
	45 to 54	16	27.1	27.1	47.5
	55 to 64	18	30.5	30.5	78.0
	65 or Older	13	22.0	22.0	100.0
	Total	59	100.0	100.0	

RACE

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	White	53	89.8	89.8	89.8
	African American	5	8.5	8.5	98.3
	Prefer Not to Say	1	1.7	1.7	100.0
	Total	59	100.0	100.0	

MARITAL STATUS

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Single	7	11.9	11.9	11.9
	Married	45	76.3	76.3	88.1
	Divorced	2	3.4	3.4	91.5
	Widowed	5	8.5	8.5	100.0
	Total	59	100.0	100.0	

INCOME GROUP

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	$20,000 to $29,999	1	1.7	1.8	1.8
	$30,000 to $39,999	4	6.8	7.1	8.9
	$40,000 to $49,999	10	16.9	17.9	26.8
	$50,000 to $59,999	4	6.8	71	33.9
	$60,000 to $74,999	9	15.3	16.1	50.0
	$75,000 to $99,999	10	16.9	17.9	67.9
	$100,000 to $124,999	5	8.5	8.9	76.8
	$125,000 to $149,999	4	6.8	7.1	83.9
	$150,000 or More	9	15.3	16.1	100.0
	Total	56	94.9	100.0	
Missing	System	3	5.1		
Total		59	100.0		

IRONDALE SURVEY RESPONSE TABLES

RETAIL SPENDING RESULTS

SPENDING PER MONTH

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	$1,000 or Less	23	39.0	39.0	39.0
	$1,001 to $2,000	23	39.0	39.0	78.0
	$2,001 to $3,000	9	15.3	15.3	93.2
	$3,001 to $4,000	3	5.1	5.1	98.3
	Over $4,000	1	1.7	1.7	100.0
	Total	59	100.0	100.0	

PERCENT SPENT OUTSIDE OF IRONDALE

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Less than 10%	1	1.7	1.7	1.7
	11% to 20%	3	5.1	5.1	6.8
	21% to 30%	4	6.8	6.8	13.6
	31% to 40%	1	1.7	1.7	15.3
	41% to 50%	5	8.5	8.5	23.7
	51% or More	45	76.3	76.3	100.0
	Total	59	100.0	100.0	

INTEREST IN ADDITIONAL RETAILERS

WOULD SPEND MORE OR LESS

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Would Shop Much More	55	93.2	94.8	94.8
	Would Shop Little More	1	1.7	1.7	96.6
	Would Shop As Now	2	3.4	3.4	100.0
	Total	58	98.3	100.0	
Missing	System	1	1.7		
Total		59	100.0		

DINING OUTSIDE OF IRONDALE

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	1 to 3 Times	40	67.8	70.2	70.2
	4 to 6 Times	14	23.7	24.6	94.7
	7 to 9 Times	1	1.7	1.8	96.5
	10 or More Times	2	3.4	3.5	100.0
	Total	57	96.6	100.0	
Missing	System	2	3.4		
Total		59	100.0		

IRONDALE SURVEY RESPONSE TABLES

RETAIL SPENDING RESULTS

RESTAURANT SPENDING

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	$25 or Less	16	27.1	27.6	27.6
	$26 to $50	26	44.1	44.8	72.4
	$51 to $75	14	23.7	24.1	96.6
	$76 to $100	2	3.4	3.4	100.0
	Total	58	98.3	100.0	
Missing	System	1	1.7		
Total		59	100.0		

SITE PREFERENCE FOR ADDITIONAL RETAIL

I-459 & GRANTS MILL ROAD

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Very Low Interest	2	3.4	3.4	3.4
	Low Interest	1	1.7	1.7	5.2
	Moderate Interest	11	18.6	19.0	24.1
	High Interest	15	25.4	25.9	50.0
	Very High Interest	29	49.2	50.0	100.0
	Total	58	98.3	100.0	
Missing	System	1	1.7		
Total		59	100.0		

KILGORE MEMORIAL DRIVE AT GRANTS MILL STATION

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Very Low Interest	3	5.1	5.1	5.1
	Low Interest	4	6.8	6.8	11.9
	Moderate Interest	18	30.5	30.5	42.4
	High Interest	29	49.2	49.2	91.5
	Very High Interest	5	8.5	8.5	100.0
	Total	59	100.0	100.0	

US HIGHWAY 78 AT FORMER FOOD WORLD SHOPPING CENTER

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Very Low Interest	6	10.2	10.2	10.2
	Low Interest	10	16.9	16.9	27.1
	Moderate Interest	23	39.0	39.0	66.1
	High Interest	15	25.4	25.4	91.5
	Very High Interest	5	8.5	8.5	100.0
	Total	59	100.0	100.0	

IRONDALE SURVEY RESPONSE TABLES

SITE PREFERENCE FOR ADDITIONAL RETAIL

US HIGHWAY 78 & 16TH STREET

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Very Low Interest	5	8.5	8.6	8.6
	Low Interest	13	22.0	22.4	31.0
	Moderate Interest	21	35.6	36.2	67.2
	High Interest	15	25.4	25.9	93.1
	Very High Interest	4	6.8	6.9	100.0
	Total	58	98.3	100.0	
Missing	System	1	1.7		
Total		59	100.0		

CITY PREPAREDNESS FOR RETAIL DEVELOPMENT

QUALITY OF CITY SERVICES

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Poor	4	6.8	6.9	6.9
	Fair	7	11.9	12.1	19.0
	Moderate	12	20.3	20.7	39.7
	Good	28	47.5	48.3	87.9
	Excellent	7	11.9	12.1	100.0
	Total	58	98.3	100.0	
Missing	System	1	1.7		
Total		59	100.0		

RESPOSIVE TO DEVELOPMENT NEEDS

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Not Responsive	3	5.1	5.8	5.8
	Slightly Responsive	6	10.2	11.5	17.3
	Moderately Responsive	13	22.0	25.0	42.3
	Good	23	39.0	44.2	86.5
	Highly Responsive	7	11.9	13.5	100.0
	Total	52	88.1	100.0	
Missing	System	7	11.9		
Total		59	100.0		

ORDINANCES & POLICIES

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Very Poor	4	6.8	7.5	7.5
	Poor	5	8.5	9.4	17.0
	Moderate	14	23.7	26.4	43.4
	Good	25	42.4	47.2	90.6
	Excellent	5	8.5	9.4	100.0
	Total	53	89.8	100.0	
Missing	System	6	10.2		
Total		59	100.0		

IRONDALE SURVEY RESPONSE TABLES

CITY PREPAREDNESS FOR RETAIL DEVELOPMENT

NEED NEW OR UPDATED ORDINANCES

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Definately No	1	1.7	1.8	1.8
	No	6	10.2	10.7	12.5
	Undecided or Don't Know	31	52.5	55.4	67.9
	Yes	11	18.6	19.6	87.5
	Definately Yes	7	11.9	12.5	100.0
	Total	56	94.9	100.0	
Missing	System	3	5.1		
Total		59	100.0		

APPENDIX

DETAILED RETAIL SUPPLY/ DEMAND BALANCE TABLE

NAICS	DEMAND	SUPPLY	LEAKAGE (SURPLUS)
441: Motor Vehicles & Parts Dealers	$25,509,671	$43,618,824	($18,109,154)
4411: Automobile Dealers	$21,911,797	$37,327,727	($15,415,930)
4412: Other Motor Vehicle Dealers	$1,998,555	$4,935,498	($2,936,943)
4413: Auto Parts, Accessories and Tire Stores	$1,599,319	$1,355,599	$243,720
442: Furniture & Home Furnishings	$3,520,173	$9,658,932	($6,138,759)
4421: Furniture Stores	$2,532,589	$5,142,129	($2,609,540)
4422: Home Furnishing Stores	$987,554	$4,516,803	($3,529,219)
443/4431: Electronics & Appliance Stores	$2,433,820	$7003,331	($4,569,511)
444: Building Materials, Garden Equip. & Supply Stores	$4,356,274	$4,951,703	($595,429)
4441: Building Material and Supplies Dealers	$4,141,898	$4,640,508	($498,519)
4442: Lawn and Garden Equipment and Supply Stores	$214,285	$$311,195	($96,910)
445: Food & Beverage Stores	$19,128,169	$24,213,812	($5,085,643)
4451: Grocery Stores	$18,235,663	$22,932,225	($4,696,562)
4452: Specialty Food Stores	$291,671	$867,045	($575,374)
4453: Beer, Wine & Liquor Stores	$600,835	$414,542	$186,293
446/4461: Health and Personal Care Stores	$3,080,455	$601,927	$2,478,528
447/4471: Gasoline Stores	$15,575,723	$15,299,824	$275,899
448: Clothing and Clothing Accessories Stores	$4,480,161	$16,414,510	($11,934,349)
4481: Clothing Stores	$3,450,408	$10,723,623	($7,723,215)
4482: Shoe Stores	$492,521	$88,611	$403,910
4483: Jewelry, Luggage, and Leather Goods Stores	$537,232	$5,602,276	($5,065,044)
451: Sporting Goods, Hobby, Book and Music Stores	$1,156,153	$5,169,813	($4,040,660)
4511: Sporting Goods/Hobby/Musical Instrument Stores	$541,107	$277,701	$263,406
4512: Book, Periodical, and Music Stores	$615,046	$4,919,112	($4,304,066)
7221: Full-Service Restaurants	$3,371,160	$5,835,134	($2,103,974)
7222: Limited-Service Eating Places	$11,022,939	$6,615,100	$4,407,839
7223: Special Food Services	$1,997,930	$1,165,297	$832,633
7224: Drinking Places—Alcoholic Beverages	$1,369,236	$0	$1,369,236

APPENDIX

DETAILED RETAIL SUPPLY/ DEMAND BALANCE TABLE

NAICS	DEMAND	SUPPLY	LEAKAGE (SURPLUS)
452: General Merchandise Stores	$16,097,903	$11,329,065	$4,768,838
4521: Department Stores Excluding Leased Depts.	$10,173,465	$6,722,441	$3,402,024
4529: Other General Merchandise Stores	$5,923,438	$4,556,624	$1,366,814
453: Miscellaneous Store Retailers	$1,584,291	$940,012	$644,279
4531: Florists	$235,401	$126,749	$108,652
4532: Office Supplies, Stationery, and Gift Stores	$753,695	$471,618	$282,077
4533: Used Merchandise Stores	$275,915	$56,778	$219,137
4539: Other Miscellaneous Store Retailers	$319,280	$284,867	$34,413
454: Nonstore Retailers	$4,003,558	$2,194,274	$1,809,284
4541: Electronic Shopping and Mail-Order Houses	$1,510,194	$0	$1,510,194
4542: Vending Machine Operators	$1,197,123	$0	$1,197,123
4543: Direct Selling Establishments	$1,296,241	$2,194,274	($898,033)
722: Food Service & Drinking Places	$18,121,265	$13,615,531	$4,405,734
7221: Full-Service Restaurants	$3,371,160	$5,835,134	($2,103,974)
7222: Limited-Service Eating Places	$11,022,939	$6,615,100	$4,407,839
7223: Special Food Services	$1,997,930	$1,165,297	$832,633
7224: Drinking Places—Alcoholic Beverages	$1,369,236	$0	$1,369,236