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# Ensley Community

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Redevelopment  
Market Report

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DRAFT 04-27-2012

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# Ensley Community Retail Development

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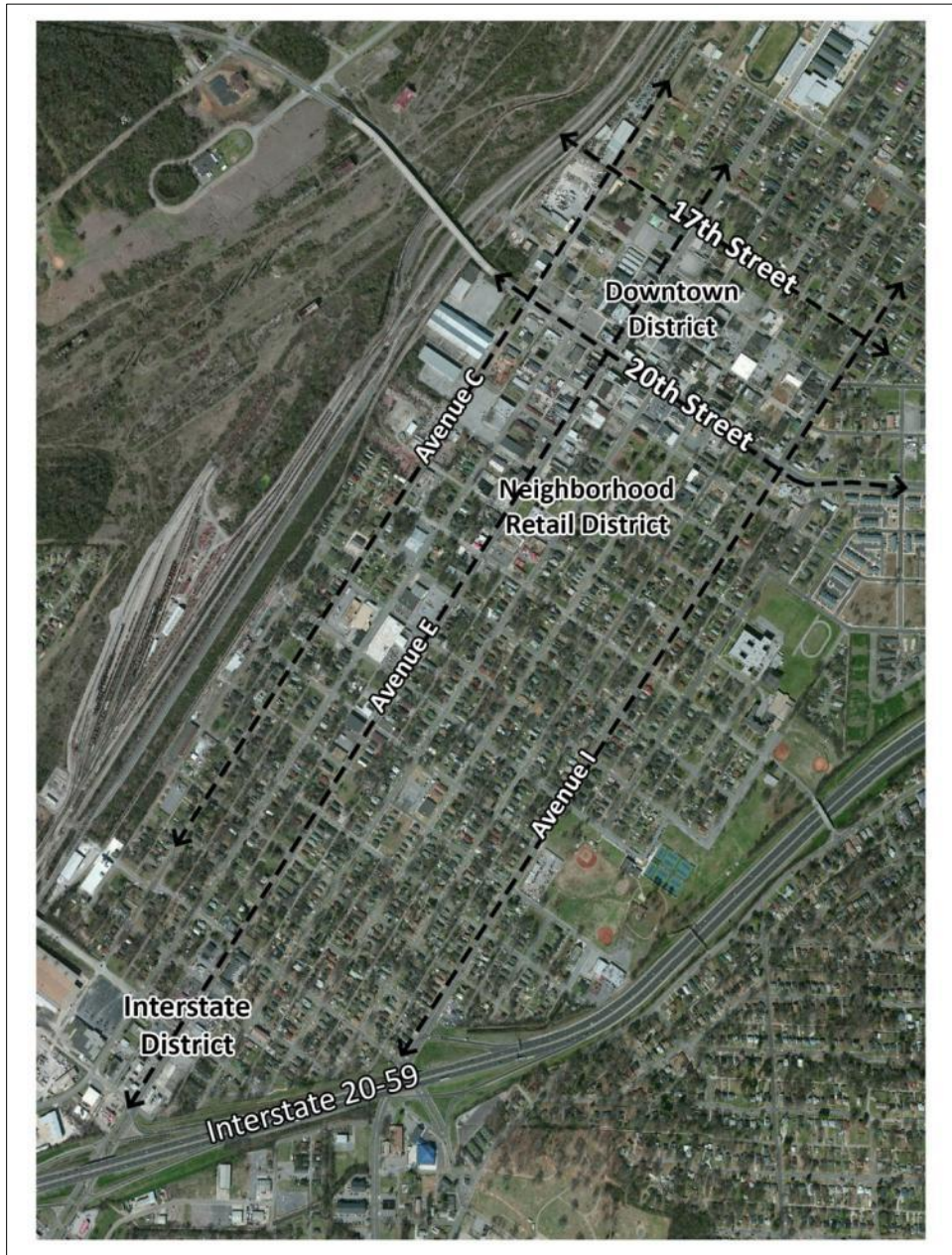
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## 1. Ensley Overview

The heart of the Ensley Community exists roughly along 20<sup>th</sup> Street between Avenue C and Avenue I. The area, called “Ensley Downtown District Trade Area” for the purposes of this report, is the area best suited for retail, convenience, and grocery anchored development within the overall Ensley Community.

The map below illustrates the extent of the Ensley Community.

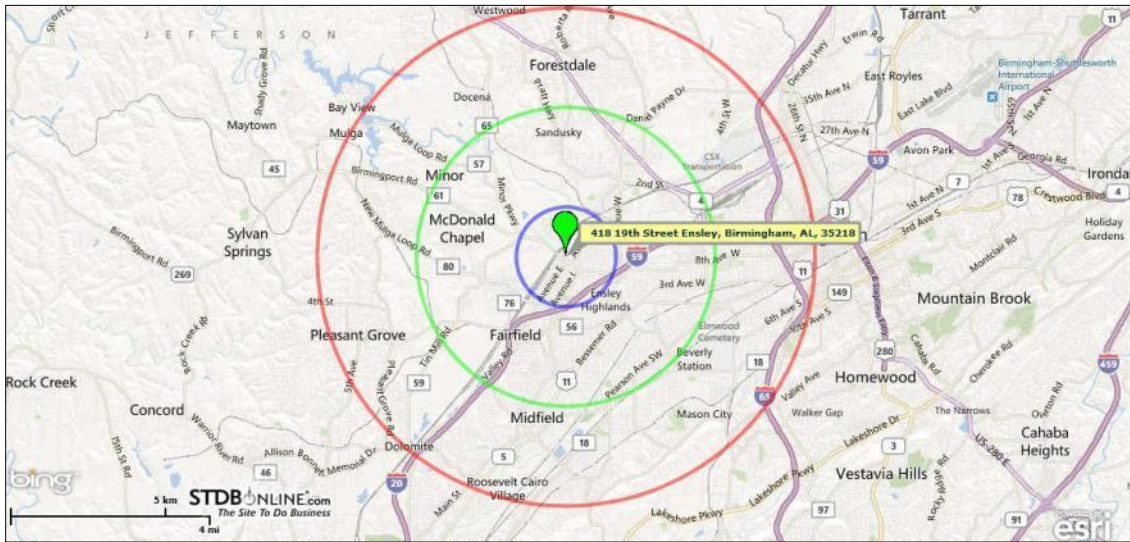


## 2. Potential Transit-Oriented Development (TOD) Area

Residents of the Ensley Community have expressed interest in having more retail and better transit in their neighborhood. As a result of this community need, the possibility of implementing transit-oriented development within the Ensley Community is being considered.

A study of the potential TOD area will use economic and demographic information that relates to a one-mile radius surrounding the Ensley Downtown District.

Below is a map of a one-mile radius (shown in blue) centered on Ensley Downtown District. The area within the one-mile radius makes up the Ensley Trade Area.



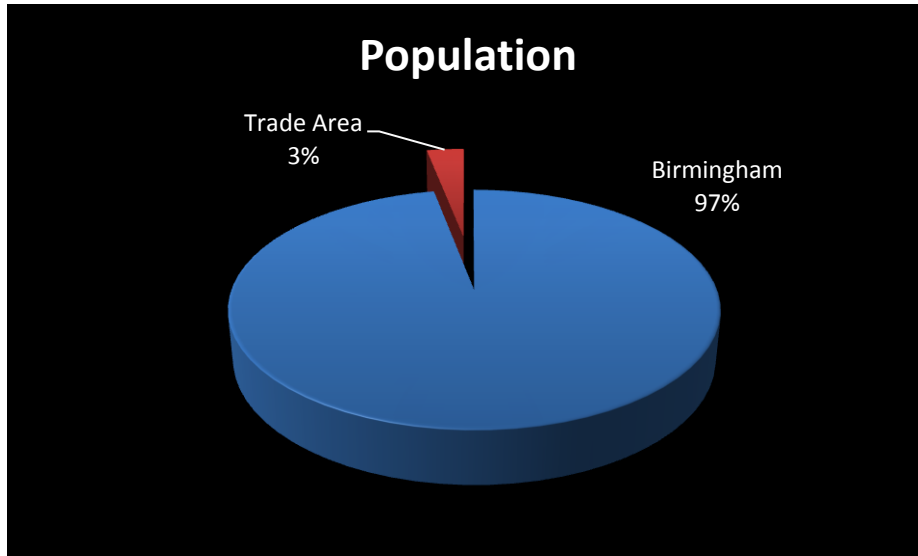
The pages that follow examine the economic and demographic characteristics of the one-mile trade area. Sources for this information are as follows:

- STDB, Esri 2010, a national consumer research organization, is the source of the Trade Area demographic information.
- U.S. Census Bureau, American Community Survey 2010 is the source of data for the United States and the City of Birmingham.

Below is a summary of key economic and demographic information as it relates to the area within a one-mile radius of Ensley. Following the summary is a more in-depth study of demographic and economic statistics for the potential trade area. These statistics compare the trade area to the City of Birmingham and the United States in order to provide context for the statistics.

- I. Dwelling Units / Housing Units (2010)
  - 3,813 housing units
  - 1.90 housing units/acre
- II. Households (2010)
  - 2,503 households
  - 1.24 households/acre
- III. Total Population (2010)
  - 6,378 persons in one-mile area
  - 3.17 persons/acre
- IV. Current Jobs (2010)
  - 2,147 Jobs/Employees
  - 1.07 jobs/acre
  - 246 businesses
- V. Estimated Income Levels (2010)
  - Median household income: \$21,476
  - Average household income: \$30,921
  - Per capita income: \$12,245
- VI. Estimated Purchasing Power (2010)
  - Average consumer spending: \$29,796
  - Average consumer spending on retail goods: \$10,841
  - Average disposable income: \$25,879

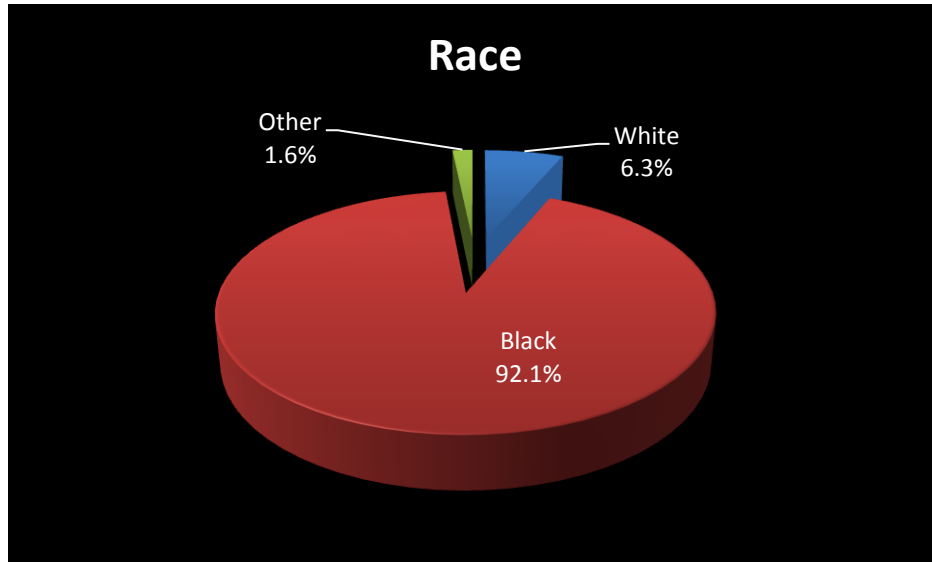
## Population 2010



Source: STDB, Esri and Infogroup.U.S. Census Bureau 2010.

- Esri and Infogroup estimate that there were approximately 6,378 people residing in the Trade Area in 2010. The Trade Area population comprised 3.0 percent of Birmingham's Total Population (212,237).
- Esri and Infogroup project that the population of the Trade Area will decline by an annual rate of 0.94 percent from 2010 to 2015. Currently, the population is 45.5 percent male and 54.5 percent female.
- Using Esri and Infogroup estimates of household composition, in 2010 there were approximately 2,503 households in the Trade Area. Assuming the same household composition, by 2015 Esri and Infogroup project there will be 2,396 households in the trade area.

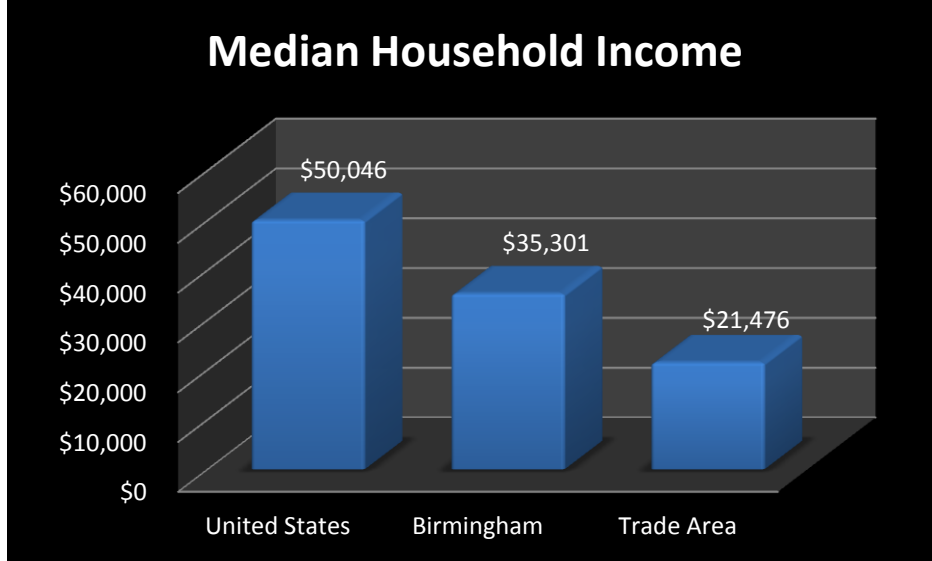
## Race in the Trade Area 2010



Source: Esri and Infogroup

- According to Esri and Infogroup, in 2010 the Trade Area's population was 92.1 percent Black/African American.
- The Trade Area's population was 6.3 percent White.
- The Trade Area's population was 0.2 percent American Indian and 0.1 percent Asian.
- 0.4 percent of the Trade Area's population was reported Some Other Race, and 0.9 percent of the Trade Area's population reported Two or More Races.

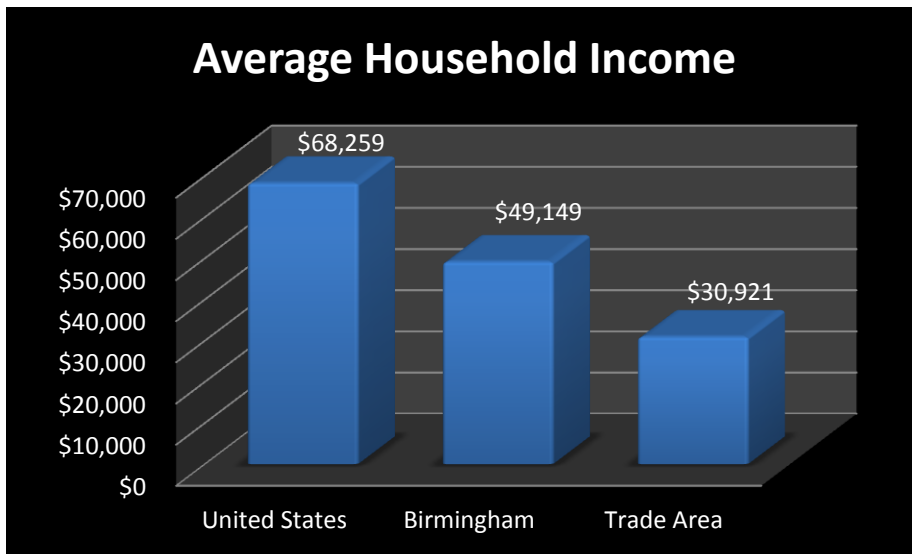
### Median Household Income 2010



Source: Esri and Infogroup, U.S. Census Bureau American Community Survey 2010

- Esri and Infogroup estimate that the median household income in the Trade Area was \$21,476 in 2010, which is below the City of Birmingham median of \$35,301. Median income in both the Trade Area and the City of Birmingham is below the national average.

### Average Household Income 2010

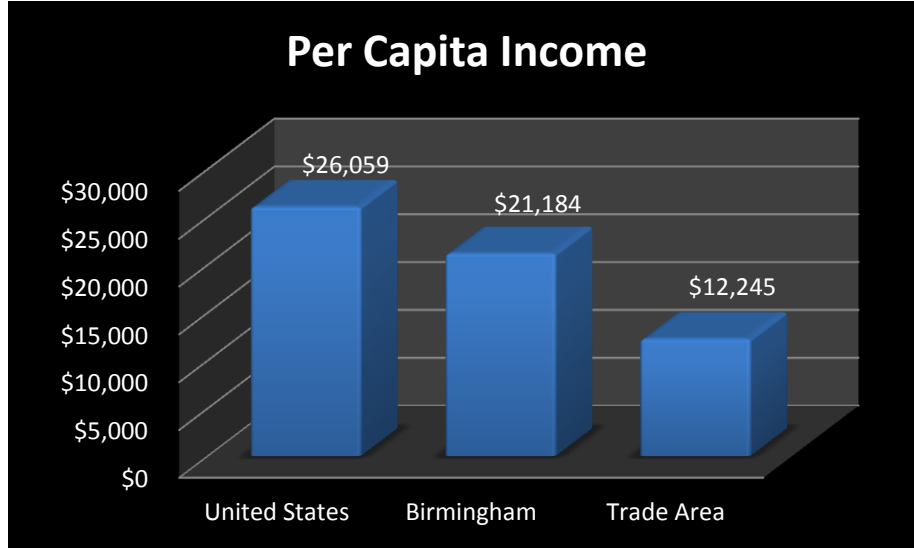


Source: Esri and Infogroup, U.S. Census Bureau American Community Survey 2010

- Households within the Trade Area have an average household income of \$30,921. Birmingham's average household income is \$49,149. Average household income in the United States was \$68,259 in 2010.



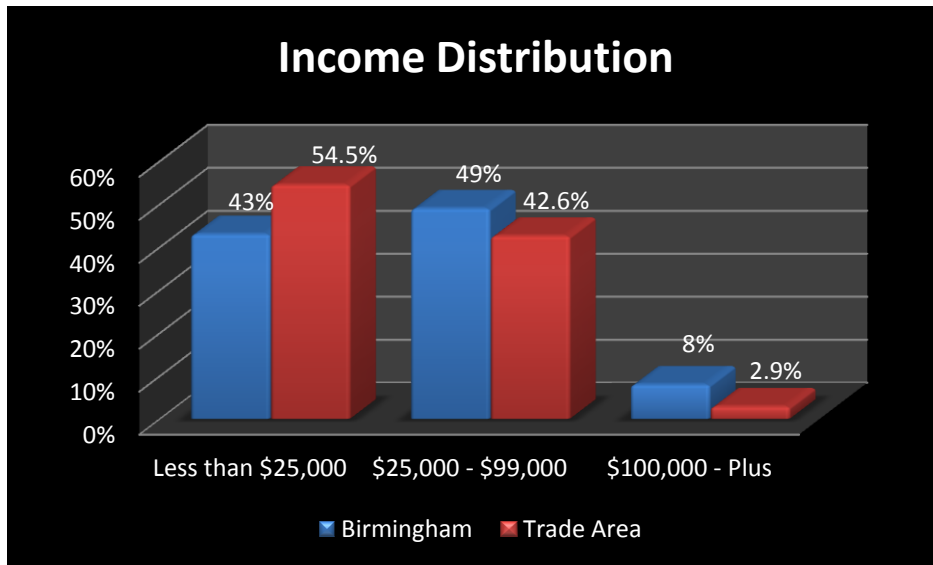
### Per Capita Income 2010



Source: Esri and Infogroup, U.S. Census Bureau American Community Survey

- The Trade Area's 2010 per capita income of \$12,245 was below the Birmingham per capita income of \$21,184. The average household in the Trade Area contained 2.52 people, and the average household size in Birmingham was estimated to be 2.21 people.

### Income Distribution 2010



Source: Esri and Infogroup, U.S. Census Bureau American Community Survey 2010

- Most of the households (54.5%) in the Trade Area have incomes below \$25,000. The Trade Area has a lower share of its households (42.6%) in the middle income brackets (earning between \$25,000 - \$99,000 per year).

## 2010 Retail Market Place Profile

Below is an overview of the existing business and retail environment called the Retail Market Place Profile. In the chart, supply (retail sales) estimates sales to consumers by establishments. Sales to businesses are excluded. Demand (retail potential) estimates the expected amount spent by consumers at retail establishments. Supply and demand estimates are in current dollars.

The Leakage/Surplus Factor presents a snapshot of retail opportunity. This is a measure of the relationship between supply and demand that ranges from +100 (total leakage) to -100 (total surplus). A positive value represents 'leakage' of retail opportunity outside the trade area. A negative value represents a surplus of retail sales, a market where customers are drawn in from outside the trade area.

The Retail Gap represents the difference between Retail Potential and Retail Sales. ESRI uses the North American Industry Classification System (NAICS) to classify businesses by their primary type of economic activity.

<b>Retail Market Place Profile - 2010</b>					
<b>Ensley Community Trade Area</b>					
<b>Summary Demographics</b>					
2010 Population		6,411			
2010 Households		2,507			
2010 Median Disposable Income		\$18,544			
2010 Per Capita Income		\$12,230			
<b>Industry Summary</b>	<b>Demand</b>	<b>Supply</b>	<b>Retail Gap</b>	<b>Surplus / Leakage Factor</b>	<b>Number of Businesses</b>
	<b>(Retail Potential)</b>	<b>(Retail Sales)</b>	<b>(Demand - Supply)</b>		
Total Retail Trade and Food & Drink (NAICS 44-45, 722)	\$30,062,130	\$57,406,516	-\$27,344,386	-31.3	41
Total Retail Trade (NAICS 44-45)	\$25,665,360	\$54,185,612	-\$28,520,252	-35.7	32
Total Food & Drink (NAICS 722)	\$4,396,770	\$3,220,904	\$1,175,866	15.4	9
<b>Industry Group</b>	<b>Demand</b>	<b>Supply</b>	<b>Retail Gap</b>	<b>Surplus / Leakage Factor</b>	<b>Number of Businesses</b>
	<b>(Retail Potential)</b>	<b>(Retail Sales)</b>			
Motor Vehicle & Parts Dealers (NAICS 441)	\$5,911,235	\$28,867,758	-\$22,956,523	-66.0	8
Automobile Dealers (NAICS 4411)	\$5,125,930	\$28,240,063	-\$23,114,133	-69.3	6
Other Motor Vehicle Dealers (NAICS 4412)	\$377,755	\$380,688	-\$2,933	-0.4	1
Auto Parts, Accessories, and Tire Stores (NAICS 4413)	\$407,550	\$247,007	\$160,543	24.5	1
Furniture & Home Furnishings Stores (NAICS 442)	\$733,236	\$2,167,630	-\$1,434,394	-49.4	1
Furniture Stores (NAICS 4421)	\$527,447	\$2,167,630	-\$1,640,183	-60.9	1
Home Furnishings Stores (NAICS 4422)	\$205,789	\$0	\$205,789	100.0	0

Electronics & Appliance Stores (NAICS 443/NAICS 4431)	\$632,712	\$7,767	<b>\$624,945</b>	<b>97.6</b>	1
Bldg Materials, Garden Equip. & Supply Stores (NAICS 444)	\$842,573	\$7,055	<b>\$835,518</b>	<b>98.3</b>	1
Building Material and Supplies Dealers (NAICS 4441)	\$798,359	\$7,055	<b>\$791,304</b>	<b>98.2</b>	1
Lawn and Garden Equipment and Supplies Stores (NAICS 4442)	\$44,214	\$0	<b>\$44,214</b>	<b>100.0</b>	0
Food & Beverage Stores (NAICS 445)	\$3,375,246	\$7,486,017	<b>-\$4,110,771</b>	<b>-37.8</b>	7
Grocery Stores (NAICS 4451)	\$3,171,647	\$7,196,288	<b>-\$4,024,641</b>	<b>-38.8</b>	6
Specialty Food Stores (NAICS 4452)	\$61,920	\$0	<b>\$61,920</b>	<b>100.0</b>	0
Beer, Wine, and Liquor Stores (NAICS 4453)	\$141,679	\$289,729	<b>-\$148,050</b>	<b>-34.3</b>	1
Health & Personal Care Stores (NAICS 446/NAICS 4461)	\$904,775	\$1,060,090	<b>-\$155,315</b>	<b>-7.9</b>	2
Gasoline Stations (NAICS 447/NAICS 4471)	\$4,862,030	\$8,307,827	<b>-\$3,445,797</b>	<b>-26.2</b>	3
Clothing and Clothing Accessories Stores (NAICS 448)	\$1,141,967	\$1,300,964	<b>-\$158,997</b>	<b>-6.5</b>	4
Clothing Stores (NAICS 4481)	\$903,533	\$564,382	<b>\$339,151</b>	<b>23.1</b>	3
Shoe Stores (NAICS 4482)	\$125,996	\$736,582	<b>-\$610,586</b>	<b>-70.8</b>	1
Jewelry, Luggage, and Leather Goods Stores (NAICS 4483)	\$112,438	\$0	<b>\$112,438</b>	<b>100.0</b>	0
Sporting Goods, Hobby, Book, and Music Stores (NAICS 451)	\$328,831	\$0	<b>\$328,831</b>	<b>100.0</b>	0
Sporting Goods/Hobby/Musical Instrument Stores (NAICS 4511)	\$170,410	\$0	<b>\$170,410</b>	<b>100.0</b>	0
Book, Periodical, and Music Stores (NAICS 4512)	\$158,421	\$0	<b>\$158,421</b>	<b>100.0</b>	0
General Merchandise Stores (NAICS 452)	\$5,282,460	\$4,479,096	<b>\$803,364</b>	<b>8.2</b>	2
Department Stores Excluding Leased Depts. (NAICS 4521)	\$1,759,879	\$80,883	<b>\$1,678,996</b>	<b>91.2</b>	1
Other General Merchandise Stores (NAICS 4529)	\$3,522,581	\$4,398,213	<b>-\$875,632</b>	<b>-11.1</b>	1
Miscellaneous Store Retailers (NAICS 453)	\$419,010	\$427,681	<b>-\$8,671</b>	<b>-1.0</b>	4
Florists (NAICS 4531)	\$38,395	\$42,579	<b>-\$4,184</b>	<b>-5.2</b>	1
Office Supplies, Stationery, and Gift Stores (NAICS 4532)	\$215,803	\$45,152	<b>\$170,651</b>	<b>65.4</b>	1
Used Merchandise Stores (NAICS 4533)	\$47,392	\$0	<b>\$47,392</b>	<b>100.0</b>	0
Other Miscellaneous Store Retailers (NAICS 4539)	\$117,420	\$339,950	<b>-\$222,530</b>	<b>-48.7</b>	2
Nonstore Retailers (NAICS 454)	\$1,231,285	\$73,727	<b>\$1,157,558</b>	<b>88.7</b>	1
Electronic Shopping and Mail-Order Houses (NAICS 4541)	\$707,794	\$0	<b>\$707,794</b>	<b>100.0</b>	0
Vending Machine Operators (NAICS 4542)	\$335,335	\$73,727	<b>\$261,608</b>	<b>64.0</b>	1
Direct Selling Establishments (NAICS 4543)	\$188,156	\$0	<b>\$188,156</b>	<b>100.0</b>	0
Food Services & Drinking Places (NAICS 722)	\$4,396,770	\$3,220,904	<b>\$1,175,866</b>	<b>15.4</b>	9
Full-Service Restaurants (NAICS 7221)	\$1,831,146	\$759,942	<b>\$1,071,204</b>	<b>41.3</b>	3
Limited-Service Eating Places (NAICS 7222)	\$2,022,793	\$2,195,514	<b>-\$172,721</b>	<b>-4.1</b>	4
Special Food Services (NAICS 7223)	\$448,112	\$0	<b>\$448,112</b>	<b>100.0</b>	0
Drinking Places - Alcoholic Beverages (NAICS 7224)	\$94,719	\$265,448	<b>-\$170,729</b>	<b>-47.4</b>	2

Source: STDB, Esri, Infogroup

## 2015 Retail Market Place Forecast

Below is an overview of the projected future business and retail environment called the Retail Market Place Forecast. As in the Market Place Profile above, the source of this information is STDB, Esri, and Infogroup. The same definitions of Supply, Demand, Leakage/Surplus Factor, and Retail Gap that apply to the Retail Market Place Profile also apply to the Retail Market Place Forecast.

<b>Retail Market Place Forecast - 2015</b>					
<b>Ensley Community Trade Area</b>					
<b>Summary Demographics</b>					
2015 Population		6,117			
2015 Households		2,400			
2015 Per Capita Income		\$12,579			
<b>Industry Summary</b>	<b>Demand (Retail Potential)</b>	<b>Supply (Retail Sales)</b>	<b>Retail Gap (Demand - Supply)</b>	<b>Surplus / Leakage Factor</b>	<b>Number of Businesses</b>
Total Retail Trade and Food & Drink (NAICS 44-45, 722)	\$29,453,609	\$65,151,872	-\$35,698,263	-37.7	40
Total Retail Trade (NAICS 44-45)	\$25,131,869	\$61,508,553	-\$36,376,684	-42.0	31
Total Food & Drink (NAICS 722)	\$4,321,740	\$3,643,319	\$678,421	8.5	8
<b>Industry Group</b>	<b>Demand (Retail Potential)</b>	<b>Supply (Retail Sales)</b>	<b>Retail Gap</b>	<b>Surplus / Leakage Factor</b>	<b>Number of Businesses</b>
Motor Vehicle & Parts Dealers (NAICS 441)	\$5,852,372	\$32,901,048	-\$27,048,676	-69.8	8
Automobile Dealers (NAICS 4411)	\$5,087,998	\$32,184,210	-\$27,096,212	-72.7	6
Other Motor Vehicle Dealers (NAICS 4412)	\$385,845	\$434,422	-\$48,577	-5.9	1
Auto Parts, Accessories, and Tire Stores (NAICS 4413)	\$378,530	\$282,416	\$96,114	14.5	1
Furniture & Home Furnishings Stores (NAICS 442)	\$799,968	\$2,620,012	-\$1,820,044	-53.2	1
Furniture Stores (NAICS 4421)	\$569,145	\$2,620,012	-\$2,050,867	-64.3	1
Home Furnishings Stores (NAICS 4422)	\$230,823	\$0	\$230,823	100.0	0
Electronics & Appliance Stores (NAICS 443/NAICS 4431)	\$694,694	\$9,223	\$685,470	97.4	0
Bldg Materials, Garden Equip. & Supply Stores (NAICS 444)	\$878,441	\$8,185	\$870,256	98.2	0
Building Material and Supplies Dealers (NAICS 4441)	\$824,936	\$8,185	\$816,751	98.0	0
Lawn and Garden Equipment and Supplies Stores (NAICS 4442)	\$53,505	\$0	\$53,505	100.0	0
Food & Beverage Stores (NAICS 445)	\$3,772,131	\$8,780,466	-\$5,008,335	-39.9	7
Grocery Stores (NAICS 4451)	\$3,586,154	\$8,479,875	-\$4,893,721	-40.6	6

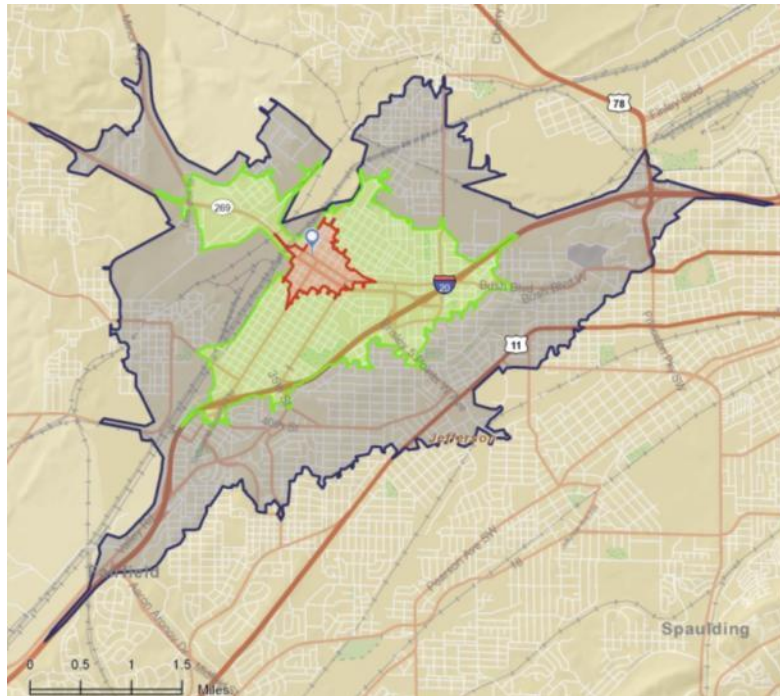
Specialty Food Stores (NAICS 4452)	\$72,664	\$0	<b>\$72,664</b>	<b>100.0</b>	0
Beer, Wine, and Liquor Stores (NAICS 4453)	\$113,313	\$300,591	<b>-\$187,278</b>	<b>-45.2</b>	1
Health & Personal Care Stores (NAICS 446/NAICS 4461)	\$795,023	\$1,030,433	<b>-\$235,409</b>	<b>-12.9</b>	2
Gasoline Stations (NAICS 447/NAICS 4471)	\$5,126,729	\$9,711,959	<b>-\$4,585,231</b>	<b>-30.9</b>	3
Clothing and Clothing Accessories Stores (NAICS 448)	\$1,042,730	\$1,365,337	<b>-\$322,607</b>	<b>-13.4</b>	4
Clothing Stores (NAICS 4481)	\$835,337	\$615,331	<b>\$220,006</b>	<b>15.2</b>	3
Shoe Stores (NAICS 4482)	\$109,608	\$750,006	<b>-\$640,397</b>	<b>-74.5</b>	1
Jewelry, Luggage, and Leather Goods Stores (NAICS 4483)	\$97,785	\$0	<b>\$97,785</b>	<b>100.0</b>	0
Sporting Goods, Hobby, Book, and Music Stores (NAICS 451)	\$296,417	\$0	<b>\$296,417</b>	<b>100.0</b>	0
Sporting Goods/Hobby/Musical Instrument Stores (NAICS 4511)	\$121,647	\$0	<b>\$121,647</b>	<b>100.0</b>	0
Book, Periodical, and Music Stores (NAICS 4512)	\$174,769	\$0	<b>\$174,769</b>	<b>100.0</b>	0
General Merchandise Stores (NAICS 452)	\$4,420,967	\$4,532,998	<b>-\$112,030</b>	<b>-1.3</b>	2
Department Stores Excluding Leased Depts. (NAICS 4521)	\$1,780,499	\$92,810	<b>\$1,687,689</b>	<b>90.1</b>	1
Other General Merchandise Stores (NAICS 4529)	\$2,640,469	\$4,440,188	<b>-\$1,799,719</b>	<b>-25.4</b>	1
Miscellaneous Store Retailers (NAICS 453)	\$403,941	\$460,872	<b>-\$56,931</b>	<b>-6.6</b>	4
Florists (NAICS 4531)	\$43,438	\$50,378	<b>-\$6,939</b>	<b>-7.4</b>	1
Office Supplies, Stationery, and Gift Stores (NAICS 4532)	\$207,567	\$52,447	<b>\$155,120</b>	<b>59.7</b>	1
Used Merchandise Stores (NAICS 4533)	\$38,743	\$0	<b>\$38,743</b>	<b>100.0</b>	0
Other Miscellaneous Store Retailers (NAICS 4539)	\$114,193	\$358,047	<b>-\$243,855</b>	<b>-51.6</b>	2
Nonstore Retailers (NAICS 454)	\$1,048,456	\$88,020	<b>\$960,436</b>	<b>84.5</b>	1
Electronic Shopping and Mail-Order Houses (NAICS 4541)	\$543,896	\$0	<b>\$543,896</b>	<b>100.0</b>	0
Vending Machine Operators (NAICS 4542)	\$326,206	\$88,020	<b>\$238,186</b>	<b>57.5</b>	1
Direct Selling Establishments (NAICS 4543)	\$178,354	\$0	<b>\$178,354</b>	<b>100.0</b>	0
Food Services & Drinking Places (NAICS 722)	\$4,321,740	\$3,643,319	<b>\$678,421</b>	<b>8.5</b>	8
Full-Service Restaurants (NAICS 7221)	\$1,826,848	\$877,284	<b>\$949,564</b>	<b>35.1</b>	3
Limited-Service Eating Places (NAICS 7222)	\$1,995,043	\$2,507,561	<b>-\$512,517</b>	<b>-11.4</b>	4
Special Food Services (NAICS 7223)	\$428,461	\$0	<b>\$428,461</b>	<b>100.0</b>	0
Drinking Places - Alcoholic Beverages (NAICS 7224)	\$71,387	\$258,474	<b>-\$187,087</b>	<b>-56.7</b>	2

Source: STDB, Esri, Infogroup

### 3. Potential Commercial Centers/Convenience Retail in Carraway – Ensley Trade Area

A focus of new retail development within the Ensley trade area will be commercial centers and convenience retail. An analysis of economic and demographic information related to specific drive-time polygons around the trade area provides helpful background for potential commercial centers/convenience retail development.

Below is a map of 1, 3, and 5 minute drive times surrounding the Ensley Trade Area.



Below is a summary of economic and demographic information as it relates to 1, 3, and 5-minute drive-time polygons surrounding the Ensley trade area.

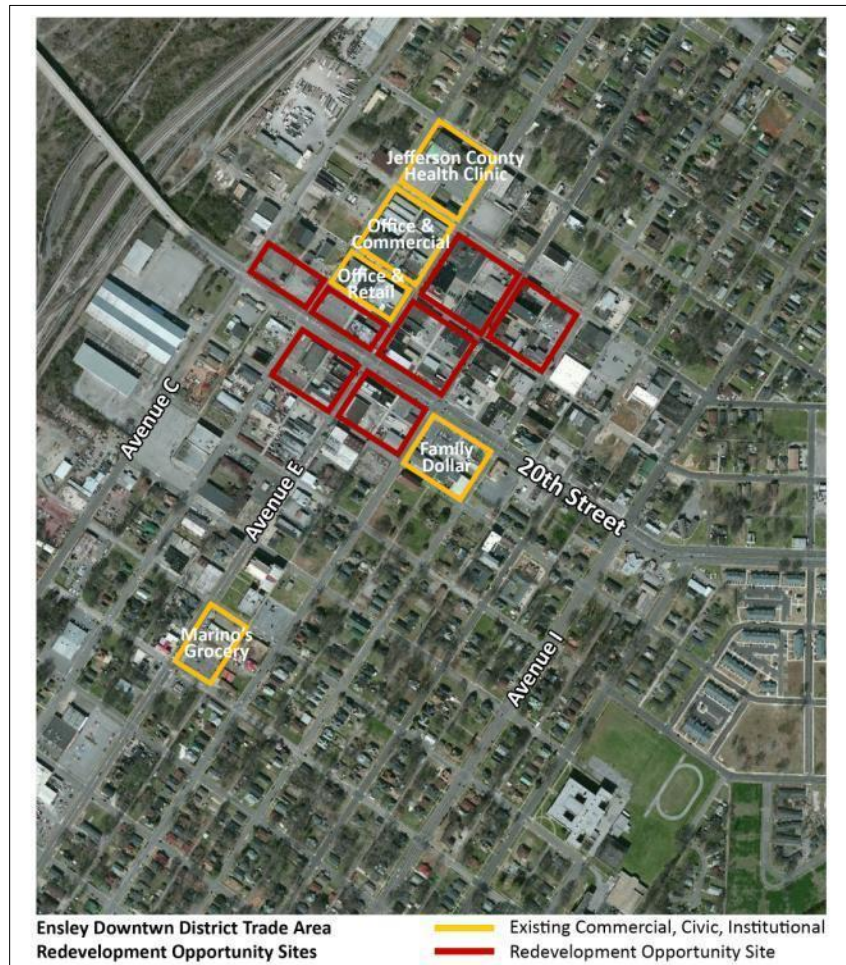
	1-Minute Drive Time	3-Minute Drive Time	5-Minute Drive Time
<b>Population</b>	254	7,256	28,498
<b>Households</b>	93	2,778	10,448
<b>Median Household Income</b>	\$20,872	\$22,309	\$29,979
<b>Average Household Income</b>	\$29,556	\$31,879	\$37,694
<b>Per Capita Income</b>	\$11,822	\$12,414	\$14,470
<b>Total Jobs/Employees</b>	916	2,834	10,152
<b>Total Businesses</b>	121	282	810

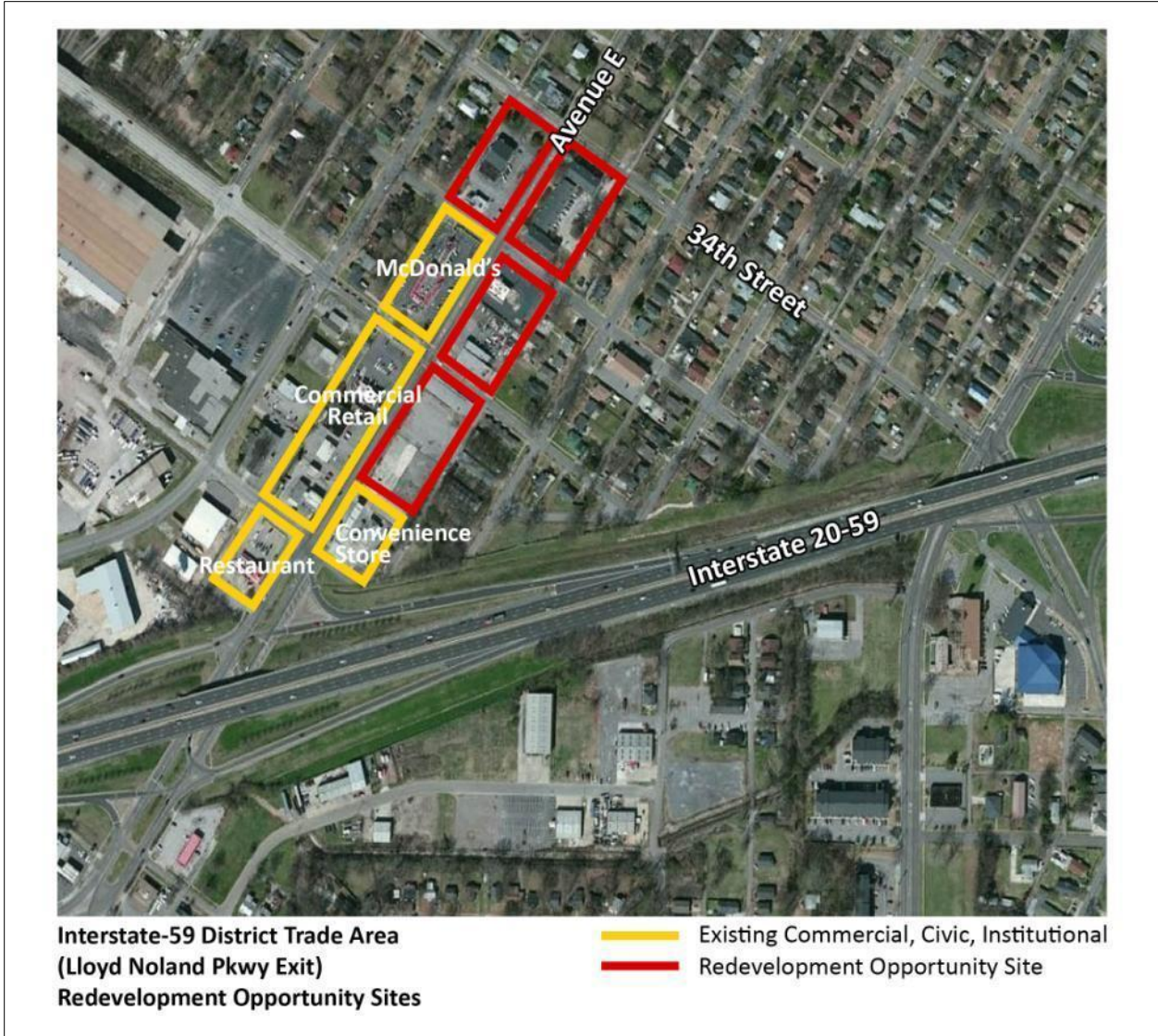
*Source: STDB, Esri, Infogroup*

#### 4. Trade Area Redevelopment Opportunity Sites

The planning team identified several large “opportunity sites” across the trade area that could support significant redevelopment. Located along existing or proposed transit routes, these vacant or underutilized light-industrial, residential, and commercial areas offer the Ensley Trade Area a unique opportunity to build vibrant, contemporary, transit-oriented neighborhood, main streets, and commercial centers. Of varying densities, these new developments would incorporate the best qualities of existing, historic neighborhoods. Housing and commercial market analysis suggests that sufficient demand will exist to assure the success of redevelopment on these sites. The results of the market analysis shaped the recommendations for each of these sites, which collectively would bring the Ensley Trade Area broadened housing choices, expanded retail offerings, increased sales tax revenues, and new jobs.

Below is a map of Downtown Ensley Trade Area and the Interstate-59 Ensley Trade Area with existing retail, residential, civic, and institutional space highlighted in yellow and redevelopment opportunity sites highlighted in red.





In the pages that follow, BLOC has identified several sites within the Ensley Trade Area that are ripe for retail, commercial, housing, and mixed-use development. Each site is identified by its cross-streets and a photograph of the existing conditions at the site.



Avenue E. at 19<sup>th</sup> Street



Streetscape  
19th Street Ensley



Streetscape  
Avenue E. at 18<sup>th</sup> Street



Streetscape  
18<sup>th</sup> Street Ensley



Avenue F. Building



Streetscape Avenue F Ensley



Streetscape  
Avenue F & 19<sup>th</sup> Street Ensley



Streetscape  
19<sup>th</sup> Street Ensley





Streetscape  
20<sup>th</sup> Street Ensley



Streetscape  
Avenue E & 20<sup>th</sup> Street Ensley



Streetscape  
Avenue E Ensley



Streetscape  
20<sup>th</sup> Street Ensley



Family Dollar Shopping Center  
20<sup>th</sup> Street Ensley



Texaco  
20<sup>th</sup> Street Ensley & Avenue I.



Streetscape  
20<sup>th</sup> Street & Avenue E Ensley



## 5. Summary of Findings

A retail market analysis prepared by BLOC Global for the City of Birmingham's Ensley Trade Area concluded that by 2015:

- Residents will hold approximately \$30,062,130 in retail spending potential.
- Given the target market, the retail in the Ensley community along 20<sup>th</sup> Street (Downtown District), Avenue I, and Avenue E has the potential to be pedestrian friendly and incorporated into a mixed-use environment.
- Retail should target local customers and not serve as a regional destination.
- The amount of retail developed will largely depend on the expansion of existing anchors such as Marino's Grocery, Family Dollar, and newly developed retail and office space in the Ensley Trade Area.
- Neighborhood serving retail including building material and supplies dealers, department stores excluding leased departments, electronic shopping and mail-order houses, full-service restaurants, and special food services offer the greatest opportunity at these locations.