

Downtown Etna Commercial Revitalization Base Economic Opportunities



Technical Memorandum

Prepared by:

URBAN PARTNERS

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Prepared for:

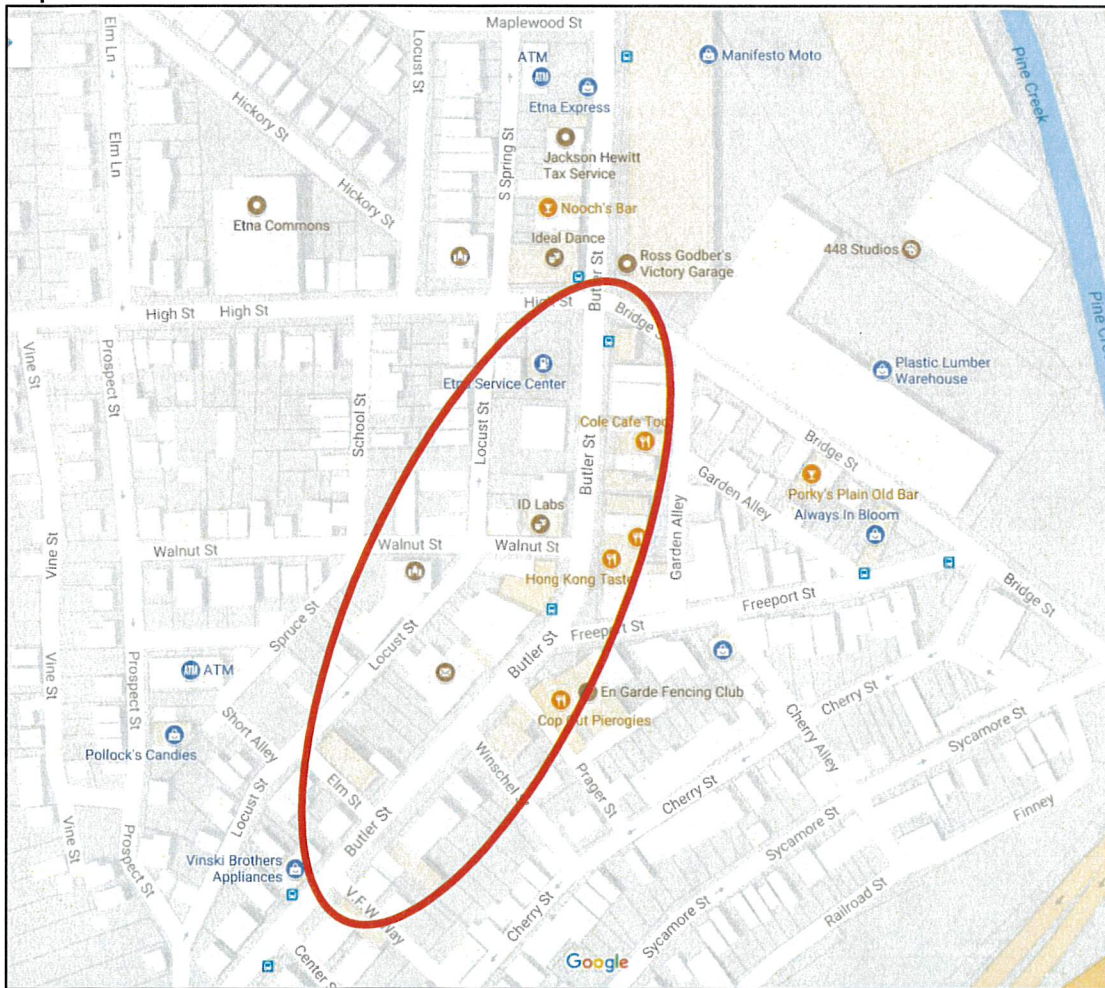


Introduction

The Borough of Etna is undertaking a multi-faceted effort to revitalize its downtown commercial district. This includes working with Town Center Associates on Main Street initiatives as well as with Palo Alto Partners on the recently-completed Upper Floor Re-Use Study that examined strategies for improving downtown properties with vacant upper floors.

The Borough has recently retained Urban Partners to assist with the current revitalization planning in the downtown area. Acknowledging the other ongoing initiatives, this effort focuses on rehabilitating properties with vacant and underutilized ground-floor commercial spaces along Etna's primary downtown corridor – Butler Street. Of particular focus is the 323-399 block (see **Map 1**).

Map 1. Downtown Etna and the 323-399 Block of Butler Street



Source: Google Maps

The scope of work for this project involves several components that will collectively assist the Borough with addressing ground-floor vacancies and revitalizing key downtown buildings. The first task is this Base Economic Opportunities report. It includes an evaluation of property characteristics on the 323-399 block of Butler Street, both physical and economic, as well as a retail market assessment.

Physical characteristics identified include building ground floor sizes and current uses. Economic characteristics include any recent sales, current rents, current market values of the properties, and property ownership, highlighting specific patterns such as multiple buildings with a single owner.

The retail market assessment has been conducted to understand the demand and opportunities for commercial ground-floor uses – particularly retail and restaurants – appropriate for downtown Etna that could occupy existing vacant and underutilized storefronts on Butler Street and encourage an active mixed-use environment.

A later phase will involve prioritizing properties identified as critical for revitalizing downtown Etna, and an action plan for facilitating the rehabilitation of these properties.


Physical Property Characteristics

The buildings in downtown Etna constituting the 323-399 block of Butler Street exist in a variety of sizes and heights, with both commercial and residential uses occupying the ground floors (see **Table 1**).

Table 1. Ground Floor Physical Characteristics and Uses – 323-399 block of Butler Street

| Address | Street | Ground Floor Use | Business Classification | Ground Floor Size (SF) | # of Floors |
|---------|------------|--|-------------------------------------|------------------------|-------------|
| 323 | Butler St. | Vacant Lot | N/A | N/A | N/A |
| 327 | Butler St. | Vacant Lot | N/A | N/A | N/A |
| 329 | Butler St. | Vacant Lot | N/A (For Sale) | N/A | N/A |
| 330 | Butler St. | Residential | N/A | 800 | 3 |
| 332 | Butler St. | Residential | N/A | 800 | 3 |
| 331-333 | Butler St. | Vacant (former Ogradnik-Hahn Funeral Home) | N/A (Under Agreement) | 3,500 | 3 |
| 335 | Butler St. | Etna Post Office | Post Office | 2,200 | 1 |
| 337 | Butler St. | Vacant | N/A | 1,500 | 3 |
| 338 | Butler St. | Jester's Court | Tattoo Studio | 900 | 2 |
| 339 | Butler St. | Three in One Clothing | Thrift Store | 1,000 | 3 |
| 340 | Butler St. | Offices | Business Equipment Supply | 900 | 2 |
| 341 | Butler St. | Vacant | N/A (Recently Sold) | 1,000 | 3 |
| 342-344 | Butler St. | Etna Coin Dealer | Coin Dealer/Gift Shop | 900 | 2 |
| 343 | Butler St. | GWC Vape Shop | Vape/Smoke Store (Recently Sold) | 1,000 | 3 |
| 345 | Butler St. | Vacant | N/A (Under Agreement) | 1,000 | 3 |
| 346 | Butler St. | Winschel Hardware | Hardware Store | 1,800 | 3 |
| 347 | Butler St. | Vacant (formerly Stumpf's Meats) | N/A (Under Agreement) | 900 | 3 |
| 350 | Butler St. | Cop Out Pierogies/Charles Catering | Limited-Service Restaurant | 1,300 | 1 |
| 351 | Butler St. | Residential | N/A | 1,400 | 3 |
| 352 | Butler St. | Pollak's Candies | Candy Store | 1,500 | 2 |
| 353 | Butler St. | Best Little Hair House in Pittsburgh | Hair Salon | 1,000 | 3 |
| 354 | Butler St. | Vestibule | N/A | 1,500 | 2 |
| 355 | Butler St. | Martin R. Productions | Professional Services - Photography | 600 | 2 |
| 357 | Butler St. | The Lost and Found Box | Antique Store | 600 | 2 |
| 358 | Butler St. | Vacant | N/A | 1,800 | 3 |
| 360 | Butler St. | Vacant | N/A | 1,000 | 3 |
| 363 | Butler St. | I.D. Labs | Gallery and Recording Studio | 1,800 | 2 |
| 364 | Butler St. | Vacant | N/A | 900 | 3 |
| 366 | Butler St. | Hong Kong Taste | Limited-Service Restaurant | 900 | 3 |
| 367 | Butler St. | Vacant | N/A | 1,000 | 2 |
| 368-370 | Butler St. | Matshner, John R., Public Accountant | Professional Services - Accounting | 1,100 | 3 |
| 369 | Butler St. | Nova Dental Association | Professional Services - Dental | 1,500 | 2 |
| 372 | Butler St. | Quickhatch | Coffee Shop | 900 | 3 |
| 374 | Butler St. | Ranalli's Hair Shop | Hair Salon | 800 | 2 |
| 376 | Butler St. | Amato's Pizza | Limited-Service Restaurant | 1,500 | 3 |
| 378 | Butler St. | Residential | N/A | 1,300 | 3 |
| 381 | Butler St. | Vacant (Former PNC Bank) | N/A (Recently Sold) | 3,700 | 1 |

Table 1, cont. Ground Floor Physical Characteristics and Uses – 323-399 block of Butler Street



| Address | Street | Ground Floor Use | Business Classification | Ground Floor Size (SF) | # of Floors |
|---------|------------|-------------------------------------|-------------------------|------------------------|-------------|
| 382 | Butler St. | Residential | N/A | 1,700 | 3 |
| 384 | Butler St. | City Gourmet | Catering Service | 800 | 3 |
| 388 | Butler St. | Reneski Replications | Art Production | 4,900 | 1 |
| 392 | Butler St. | Residential | N/A | 2,300 | 2 |
| 394-396 | Butler St. | Big Mike's Tavern | Bar | 1,600 | 3 |
| 399 | Butler St. | Storage/Miscellaneous & Parking Lot | N/A (Under Agreement) | 1,200 | 1 |

Building Sizes

Ground floor building sizes range from approximately 4,900 SF at 388 Butler Street - home of Reneski Replications - to just 600 SF at 355 and 357 Butler Street, occupied by Martin R. Productions and the Lost and Found Box, respectively. The second and third largest ground floor spaces are currently vacant. Those are the former PNC bank of approximately 3,700 SF and the former Ogrodnik-Hahn Funeral Home of approximately 3,500 SF. The largest ground floor space occupied by a retailer is the 1,800 SF Winschel Hardware store at 346 Butler Street. Though some of these larger spaces exist, more than half (58%) of buildings in the 323-399 block of Butler Street have ground floors in the range of 1,000 to 1,800 SF. Another 29% are under 1,000 SF.

Building Heights

Table 1 identifies the building heights on the 323-399 block of Butler Street, which range from one to three stories. The majority of buildings – 55% - contain three stories, while another 32% have two stories. The two largest buildings on the block – Reneski Replications and the former PNC bank – are both single-story and located across the street from one another. There is a total of five single-story buildings on the 323-399 block.

Ground Floor Uses & Vacancies

Uses occupying the ground floors of these buildings are varied as well, as shown in Table 1. Twelve of the storefronts are vacant, including the vestibule at 354 Butler Street, as well as the former gas station, which is only occasionally used and currently under agreement. These vacancies comprise approximately 19,000 SF of space, or 33% of the ground floor square footage on the block. In addition, there are three vacant lots.

Another six buildings, comprising 15% of the space, have residential uses on the ground floor. The one institutional use on the block is the Etna post office. The remaining 48% is occupied by commercial uses. Of these 23

commercial spaces, 14 are retailers. Retailers include three restaurants (all limited-service, an antique store, a bar, candy store, coffee shop, gift shop, two hair salons, a hardware store, thrift store, and tobacco/vape shop.

Three new food-related businesses are anticipated to join the block in the future. The former funeral home, currently under agreement, is slated to become a new coffee shop, while the three vacant parcels next door are expected to become a new microbrewery housed in a new-construction building. Negotiations have also been taking place for a restaurant to occupy the former PNC bank building, also under agreement. If these two existing spaces indeed become occupied by new restaurants, the amount of vacant storefront square footage will be reduced to approximately 12,000 SF, or 21% of the space on the 323-399 block of Butler Street.

The remaining nine businesses are service-oriented, including an art production business, auto repair shop, business equipment supply business, caterer, gallery and recording studio, accountant, dentist, photography studio, and tattoo parlor.

In addition, there are three vacant lots on the 323-399 block – 323, 327, and 329 Butler Street, which are all contiguous. The former funeral home owns 329, which was part of its parking lot and driveway. The Etna Economic Development Corporation owns the vacant lot at 327 Butler Street.

Economic Property Characteristics

We have also examined the buildings on the 323-399 block of Butler Street for their economic characteristics, including sales data, current market values, and rents, as well as ownership patterns (see **Table 2**).

Sales Data

Table 2 indicates that the purchasing of properties on the 323-399 block of Butler Street by current owners has occurred over the past seven decades. The building purchased the earliest by an existing owner is 337 Butler Street, currently a vacant storefront, which was last sold in 1955. No record of a sales price exists for this property. A decade later, the former PNC bank property was sold, also with no record of a sales price. Since then, the number of properties last sold by decade are as follows:

- 1970s: 4
- 1980s: 9
- 1990s: 2
- 2000s: 8
- 2010s: 9 (as of November 2017)

The most recent sales occurred in August of 2013. Three properties sold that year, including 358-360 Butler Street and 364-366 Butler Street on the same day, both purchased by Archie and Janet Isherwood. The other property sold in 2013 is home to Cop Out Pierogies. Prior to those sales, two occurred in 2012 on the same day – 363 (I.D. Labs) and 367 Butler Street to Eric Dan. In 2011, two sales occurred as well – 341-343 to Archie and Janet Isherwood, and the building housing Quickhatch coffee shop (372 Butler Street). As of November 2017, 341-343 just resold to Robert and Megan Tunon. Several other properties are for sale or currently under agreement (see below).

Properties for Sale/Under Agreement

As indicated above, several properties on the 323-399 block of Butler Street are currently for sale or under agreement, most of which are vacant on the ground floor. These properties offer new uses, new businesses, and new opportunities for downtown Etna. Current properties for sale include:

- ~~324~~ 333 Butler Street (former Ogradnik-Hahn Funeral Home) – Vacant (under agreement) – *Shing Bean*
- 345-347 Butler Street – Vacant (under agreement; 11/27/17 closing)
- 381 Butler Street – Former PNC Bank (recently sold)
- 388 Butler Street – Currently Reneski Replications – *TOMLIN*
- 399 Butler Street – Storage, former auto repair shop (under agreement; 11/19/17 closing)

Table 2. Economic Property Characteristics – 323-399 block of Butler Street

| Address | Street | Business/Use | Owner | Sale Date | Sale Price | Market Value |
|---------|------------|--|--|------------|------------|--------------|
| 323 | Butler St. | Vacant Lot | Jolo Realty Co. | N/A | N/A | \$ 21,600 |
| 327 | Butler St. | Vacant Lot | Etna Economic Development Corp. | N/A | N/A | \$ 9,200 |
| 329 | Butler St. | Vacant Lot - For Sale | Ogrodnik Hahn Funeral Properties, Inc. | 11/17/200 | w/331-333 | \$ 2,300 |
| 330 | Butler St. | Residential | Jodie Fine Sheriff | 4/18/1986 | \$ 22,000 | \$ 36,300 |
| 332 | Butler St. | Residential | Jodie Fine Sheriff | 4/18/1986 | \$ 42,000 | \$ 41,000 |
| 331-333 | Butler St. | Vacant (formerly Funeral Home) - Under Agreement | Ogrodnik Hahn Funeral Properties, Inc. | 11/17/2000 | \$ 250,000 | \$ 158,000 |
| 335 | Butler St. | Etna Post Office | Russell S. Makrauer | 8/15/2001 | N/A | \$ 113,600 |
| 337 | Butler St. | Vacant | Peter & Rose Depascale | 4/27/1955 | N/A | \$ 62,400 |
| 338 | Butler St. | Jester's Court | Sean McCarthy | 9/29/2005 | N/A | \$ 78,700 |
| 339 | Butler St. | Three in One Clothing | Donald P. & Elizabeth J. Block | 3/24/1976 | \$ 8,500 | \$ 37,300 |
| 340 | Butler St. | Offices | Jamie Quenterno | N/A | N/A | N/A |
| 341-343 | Butler St. | Vacant (341)/GWC Vape Shop (343) - Recently Sold | Robert and Megan Tunon | N/A | N/A | N/A |
| 342-344 | Butler St. | Etna Coin Dealer | John F. Winschel | 9/17/1979 | N/A | \$ 57,600 |
| 345-347 | Butler St. | Vacant/Vacant (formerly Stumpf's Meats) - Under Agrmnt | Geraldine Smerdel | 6/13/1983 | \$ 80,000 | \$ 116,100 |
| 346 | Butler St. | Winschel Hardware | John F. Winschel | 9/17/1979 | N/A | \$ 77,000 |
| 350 | Butler St. | Cop Out Pierogies/Charles Catering | 350 Butler LLC | 6/10/2013 | \$ 89,000 | \$ 43,000 |
| 351-353 | Butler St. | Residential (352)/Best Little Hair House in Pittsburgh (353) | Thomas J. Danicson | 4/26/2006 | \$ 120,000 | \$ 144,200 |
| 352-354 | Butler St. | Pollak's Candies (352)/Vacant (354) | Rudolph C. Raida | 4/8/1980 | \$ 85,000 | \$ 115,000 |
| 355-357 | Butler St. | Martin R. Productions (355)/The Lost and Found Box (357) | George J. & Kildred Kusevich | 10/30/1981 | \$ 66,000 | \$ 91,800 |
| 358-360 | Butler St. | Vacant (358)/Vacant (360) | Archie & Janet Isherwood | 8/16/2013 | \$ 120,000 | \$ 120,000 |
| 363 | Butler St. | I.D. Labs | Eric A. Dan | 3/28/2012 | \$ 115,000 | \$ 85,100 |
| 364-366 | Butler St. | Vacant (364)/Hong Kong Taste (366) | Archie & Janet Isherwood | 8/16/2013 | \$ 60,000 | \$ 60,000 |
| 367 | Butler St. | Vacant | Eric A. Dan | 3/28/2012 | w/363 | \$ 29,900 |
| 368-370 | Butler St. | Matshner, John R., Public Accountant | John R. & Denise G. Matschner | 8/10/2000 | \$ 70,000 | \$ 75,100 |
| 369 | Butler St. | Nova Dental Association | Zatman & Wolff Partnership | 10/25/1983 | \$ 77,000 | \$ 101,900 |
| 372 | Butler St. | Quickhatch | Todland Pitt James | 4/18/2011 | \$ 118,000 | \$ 109,100 |
| 374 | Butler St. | Ranalli's Hair Shop | Frank & Judith A. Ranalli | 9/27/1984 | \$ 69,500 | \$ 76,000 |
| 376 | Butler St. | Amato's Pizza | Kenneth J. Amato | 11/20/1995 | N/A | \$ 68,700 |
| 378 | Butler St. | Residential | Raymond E. & Rose Ann Anderson | 5/7/1987 | \$ 35,000 | \$ 69,000 |
| 381 | Butler St. | Vacant (Former PNC Bank) - Recently Sold | Pittsburgh National Bank | 11/3/1965 | N/A | \$ 498,800 |
| 382 | Butler St. | Residential | Raymond E. Anderson | 6/20/1986 | \$ 38,000 | \$ 59,300 |
| 384 | Butler St. | City Gourmet | Donna M. Cole | 5/22/2006 | \$ 77,600 | \$ 119,100 |
| 388 | Butler St. | Reneski Replications - For Sale | Brian J. Reneski | 3/26/2008 | \$ 207,000 | \$ 192,400 |
| 392 | Butler St. | Offices | Brian Reneski | 2/18/2005 | \$ 68,000 | \$ 73,400 |
| 394-396 | Butler St. | Big Mike's Tavern | Charles J. Titterington | 12/3/1990 | \$ 75,000 | \$ 144,800 |
| 399 | Butler St. | Storage/Miscellaneous & Parking Lot - Under Agreement | John L. & Loretta Maseth | 8/18/1976 | \$ 38,000 | \$ 75,700 |

Downtown Etna Commercial Revitalization - Base Economic Opportunities

Ownership Patterns

Several individuals own multiple properties on the 323-399 block of Butler Street. Archie and Janet Isherwood had owned the most properties at three, including 341-343, 358-360, and 364-366 Butler Street. The property at 341-343 just recently sold to new owners. The remaining owners with multiple properties on the block also own two properties each. They include:

- Brian Reneski: 388 and 392 Butler Street,
- Eric Dan: 363 and 367 Butler Street,
- Jodie Fine Sheriff: 330 and 332 Butler Street, and
- John Winschel: 342-344 and 346 Butler Street

Market Values

Market values provide an apples-to-apples comparison of what each property is currently worth. Factors influencing market values include building size, condition, and location. Table 2 shows that the buildings on the 323-399 block of Butler Street have varying ranges of value. Current market values on the block range from \$498,800 for the former PNC Bank building to \$29,900 for the currently vacant 367 Butler Street property connected to I.D. Labs. The median market value among all properties on the 323-399 block is \$76,000.

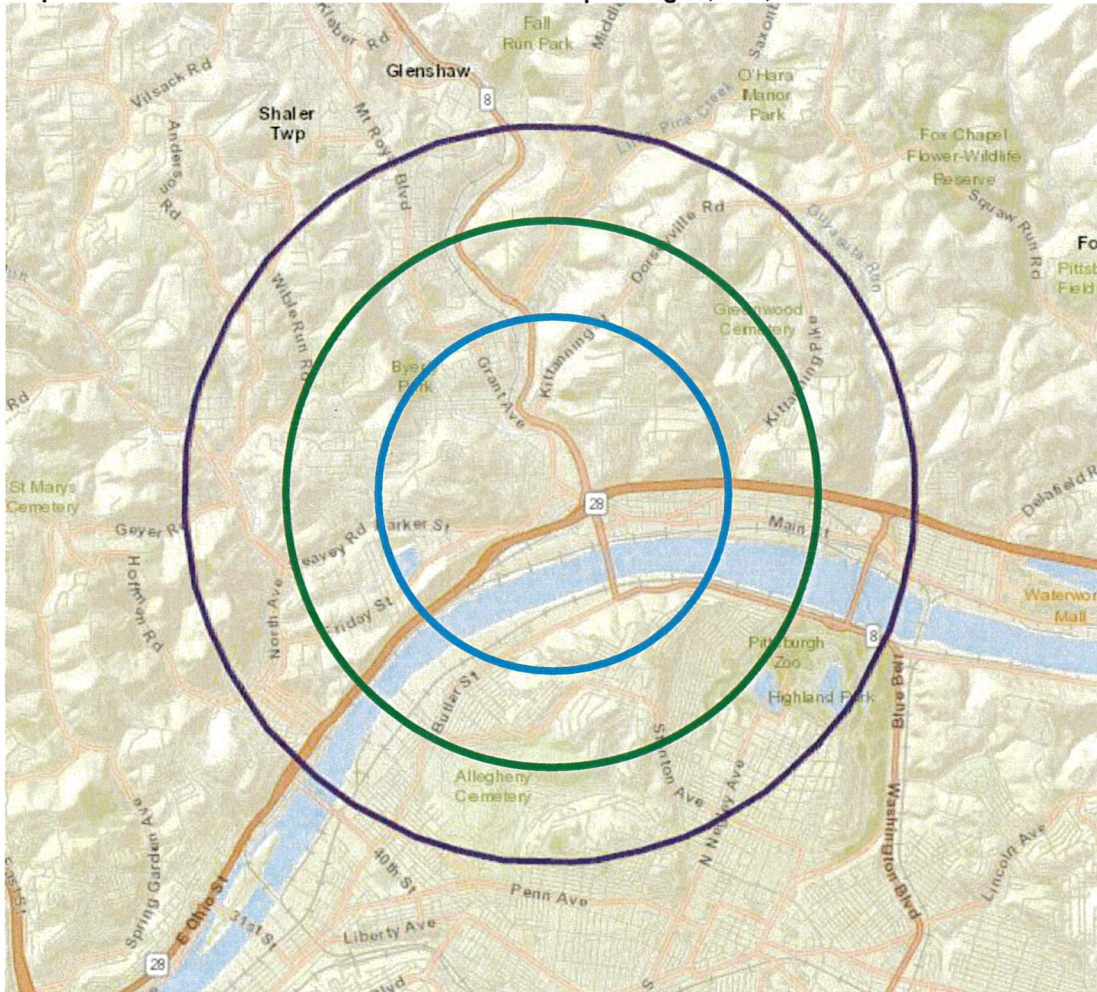
Current Rents

Although rents on the 323-399 block are generally not available for most properties (and therefore not listed in Table 2), we have been able to gather information on rents through discussions with property owners and commercial realtors. For ground floor retail space, rents in downtown Etna typically range from about \$10 to \$15 per SF. For example, according to a realtor, the asking rent for 345 Butler Street is \$12 per SF. However, rents outside this range exist as well, mostly below. The former home of Stumpf's Meats - 347 Butler Street - is asking \$7 per SF, while the rent for 343 Butler Street is just \$6 per SF.

Retail Market Assessment

Urban Partners conducted a retail market analysis to characterize the performance of existing retailers in and around downtown Etna, as well as to identify gaps and opportunities for the potential development of new retailing along the 323-399 block of Butler Street. To examine the entire range of potentially feasible retailers for this part of downtown Etna, we have defined three retail trade areas centered on the intersection of Butler Street and Freeport Street: a 1-mile radius, a 1.5-mile radius, and a 2-mile radius (see **Map 2**).

Map 2. Downtown Etna Retail Trade Area Encompassing 1-, 1.5-, and 2-Mile Radii



Source: Envirionics Analytics

The one-mile radius covers the Borough of Etna in its entirety, as well as the western portion of Sharpsburg Borough, northern part of the Lawrenceville neighborhood, and small portions of Shaler and O'Hara Townships. Residents of the 1-mile trade area are likely to travel outside

this area for many purchases in most categories of goods and services. The exception would be for the most routine daily purchases (convenience stores; dry cleaners, etc.), where customers will tend to remain very close to their residences. This 1-mile area includes mainly locally-owned retailers as well as a limited number of chain stores.

As a comparative measure, we also examined the 1.5- and 2-mile radii. The 1.5-mile radius covers almost all of Sharpsburg Borough, a much larger portion of the Lawrenceville neighborhood and its boutique shops (as well as a portion of Highland Park, including the Pittsburgh Zoo), and larger portions of Shaler and O'Hara Townships. More chain stores are found in this area as well, such as the Kmart and Shop 'n Save on Route 8.

The 2-mile radius includes all of Millvale's downtown as well as all of Sharpsburg and the western portion of Aspinwall Borough, but not the Waterworks Mall. It also extends farther into Pittsburgh – almost to 40th Street and Children's Hospital in Lawrenceville – as well as halfway into Shaler Township. Most of the western half of O'Hara Township is included as the two-mile radius extends into a small portion of Fox Chapel Borough.

Retail Supply

For this retail market analysis, we are focused chiefly on retail stores engaged in selling merchandise for personal and/or household consumption and on establishments that render services incidental to the sale of these goods. All retail establishments in the area were classified by type of business according to the principal lines of merchandise sold and the usual trade designation. In general, this classification follows the numeric system established for both government and industry practice – the NAICS.

The term "retail store sales" in this analysis includes sales by establishments that are normally found in pedestrian-oriented retail shopping areas. This definition excludes the sales of automobile dealerships and repair facilities, service stations, fuel oil dealers, and non-store retailing. Banks and other financial establishments are also excluded from this assessment because banking activities – deposits, loans, etc. – cannot be added to sales volume data for other types of retail establishments.

Retail Demand

Consumer shopping patterns vary depending on the types of goods being purchased. For convenience goods purchased frequently, such as groceries, drugs, and prepared foods, shoppers typically make purchases at stores close to their home or place of work. For larger-ticket, rarely

purchased items – such as automobiles, electronics and large appliances – shoppers may travel anywhere within the metropolitan area or beyond to obtain the right item at the right price. For apparel, household furnishings, and other shopping goods, consumers generally establish shopping patterns between these two extremes, trading at a number of shopping areas within a 30-minute commute of their homes.

In analyzing the retail market demand within a portion of a larger metropolitan area, these behavioral observations translate into a series of analytical rules-of-thumb:

- Shopping for community-serving goods and services is generally confined to the immediate trade area.
- Expenditures made at full-service restaurants will occur chiefly within the immediate trade area, but some restaurant expenditures made by the trade area population will be lost to established restaurants located outside the immediate trade area. Similarly, some restaurant sales occurring in the immediate trade area will be attracted from residents who live elsewhere in the region.
- Expenditures made by immediate trade area residents for shopping good items (department stores, apparel, and most specialty goods) will more likely occur within the area, but a substantial proportion of these sales will occur outside the area. Similarly, significant sales will be attracted from residents outside the immediate trade area to any large, well-known stores located within the trade area.
- Specific high-quality stores within the immediate trade area may attract significant clientele from well beyond the trade area for highly-targeted, single destination trips for specialized purchases.

Supply and Demand Characteristics

In this section, we compare the current supply and demand for all retail goods and services by residents of these three trade areas. To determine the supply and demand, we acquired information about the retail spending behavior of market study area residents from the Environics Analytics company. **Table 3** outlines the supply and demand characteristics of the three trade areas examined.

According to this information about the retail spending behavior of market study area residents as compiled by Environics Analytics, stores within the 1-mile trade area sell more than **\$62.2 million** worth of retail goods annually, while that trade area's population spends approximately **\$131.3 million** on retail goods annually. This retail spending includes:

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- \$29.9 million in Food and Beverage Stores,
 - \$23.0 million in General Merchandise Stores,
 - \$21.1 million in Eating and Drinking Establishments,
 - \$16.2 million in Building Material and Garden Stores,
 - \$11.3 million in Health and Personal Care Stores,
 - \$8.7 million in Clothing and Accessories Stores,
 - \$6.2 million in Miscellaneous Store Retailers,
 - \$4.2 million in Furniture and Home Furnishings Stores,
 - \$3.7 million in Auto Parts Stores,
 - \$3.7 million in Sporting Goods, Hobby, and Book Stores, and
 - \$3.4 million in Electronics and Appliance Stores.

By comparison, stores within the 1.5-mile trade area sell more than **\$132.1 million** worth of retail goods annually, while that trade area's population spends approximately **\$293.5 million** on retail goods annually. This retail spending includes:

- \$66.2 million in Food and Beverage Stores,
- \$51.4 million in General Merchandise Stores,
- \$46.8 million in Eating and Drinking Establishments,
- \$36.6 million in Building Material and Garden Stores,
- \$25.4 million in Health and Personal Care Stores,
- \$19.8 million in Clothing and Accessories Stores,
- \$13.5 million in Miscellaneous Store Retailers,
- \$9.5 million in Furniture and Home Furnishings Stores,
- \$8.4 million in Sporting Goods, Hobby, and Book Stores,
- \$8.3 million in Auto Parts Stores, and
- \$7.7 million in Electronics and Appliance Stores.

Table 3. Trade Area Retail Supply and Demand Characteristics, 2017

| | 1-Mile Radius | | | 1.5-Mile Radius | | | 2-Mile Radius | | |
|---|---|----------------------------------|--------------------------------|---|----------------------------------|--------------------------------|---|----------------------------------|--------------------------------|
| | 2017 Demand (Consumer Expenditures) | 2017 Supply (Retail Sales) | Opportunity Gap/ Surplus | 2017 Demand (Consumer Expenditures) | 2017 Supply (Retail Sales) | Opportunity Gap/ Surplus | 2017 Demand (Consumer Expenditures) | 2017 Supply (Retail Sales) | Opportunity Gap/ Surplus |
| Total Retail Sales | 131,345,719 | 62,246,922 | 69,098,797 | 293,480,298 | 132,092,376 | 161,387,922 | 491,405,495 | 204,526,524 | 286,878,971 |
| Motor Vehicle and Parts Dealers-441 | 3,716,212 | 2,635,969 | 1,080,243 | 8,265,419 | 4,309,253 | 3,956,166 | 13,853,507 | 6,856,969 | 6,996,538 |
| Automotive Parts/Accsrs, Tire Stores-4413 | 3,716,212 | 2,635,969 | 1,080,243 | 8,265,419 | 4,309,253 | 3,956,166 | 13,853,507 | 6,856,969 | 6,996,538 |
| Furniture and Home Furnishings Stores-442 | 4,194,841 | 5,759,029 | (1,564,188) | 9,488,019 | 13,323,201 | (3,835,182) | 15,997,269 | 17,348,690 | (1,351,421) |
| Furniture Stores-4421 | 2,223,983 | 3,747,907 | (1,523,924) | 5,027,052 | 6,122,044 | (1,094,992) | 8,517,720 | 6,915,864 | 1,601,856 |
| Home Furnishing Stores-4422 | 1,970,858 | 2,011,122 | (40,264) | 4,460,967 | 7,201,157 | (2,740,190) | 7,479,549 | 10,432,826 | (2,953,277) |
| Electronics and Appliance Stores-443 | 3,393,322 | 461,267 | 2,932,055 | 7,664,752 | 634,715 | 7,030,037 | 12,973,914 | 1,384,159 | 11,589,755 |
| Appliances, TVs, Electronics Stores-44311 | 3,393,322 | 461,267 | 2,932,055 | 7,664,752 | 634,715 | 7,030,037 | 12,973,914 | 1,384,159 | 11,589,755 |
| Household Appliances Stores-443111 | 508,415 | 168,127 | 340,288 | 1,151,854 | 265,676 | 886,178 | 1,913,435 | 779,407 | 1,134,028 |
| Electronics Stores-443112 | 2,884,907 | 293,140 | 2,591,767 | 6,512,898 | 369,039 | 6,143,859 | 11,060,479 | 604,752 | 10,455,727 |
| Building Material, Garden Equip Stores-444 | 16,204,902 | 1,256,798 | 14,948,104 | 36,614,098 | 4,766,959 | 31,847,139 | 60,626,477 | 8,289,922 | 52,336,555 |
| Building Material and Supply Dealers-4441 | 14,458,718 | 1,256,798 | 13,201,920 | 32,701,937 | 4,712,112 | 27,989,825 | 54,160,282 | 7,884,755 | 46,275,527 |
| Home Centers-44411 | 8,166,472 | 789,653 | 7,376,819 | 18,504,035 | 2,833,855 | 15,670,180 | 30,644,563 | 5,023,963 | 25,620,600 |
| Paint and Wallpaper Stores-44412 | 407,213 | 33,055 | 374,158 | 943,456 | 55,092 | 888,364 | 1,542,664 | 82,638 | 1,460,026 |
| Hardware Stores-44413 | 2,059,511 | 434,090 | 1,625,421 | 4,627,706 | 1,823,165 | 2,804,541 | 7,673,538 | 2,778,154 | 4,895,384 |
| Building Materials, Lumberyards-444191 | 3,825,522 | 0 | 3,825,522 | 8,626,740 | 0 | 8,626,740 | 14,299,517 | 0 | 14,299,517 |
| Lawn, Garden Equipment, Supplies Stores-4442 | 1,746,184 | 0 | 1,746,184 | 3,912,161 | 54,847 | 3,857,314 | 6,466,195 | 405,167 | 6,061,028 |
| Outdoor Power Equipment Stores-44421 | 337,526 | 0 | 337,526 | 768,107 | 0 | 768,107 | 1,266,332 | 0 | 1,266,332 |
| Nursery and Garden Centers-44422 | 1,408,658 | 0 | 1,408,658 | 3,144,054 | 54,847 | 3,089,207 | 5,199,863 | 405,167 | 4,794,696 |
| Food and Beverage Stores-445 | 29,883,859 | 14,766,127 | 15,117,732 | 66,192,377 | 43,245,889 | 22,946,488 | 110,561,500 | 62,687,320 | 47,874,180 |
| Grocery Stores-4451 | 27,259,390 | 10,934,295 | 16,325,095 | 60,354,584 | 32,648,033 | 27,706,551 | 100,747,772 | 44,166,015 | 56,581,757 |
| Supermarkets, Grocery (Ex Conv) Stores-44511 | 23,417,258 | 9,059,295 | 14,357,963 | 51,869,124 | 27,773,033 | 24,096,091 | 86,662,737 | 30,173,776 | 56,488,961 |
| Convenience Stores-44512 | 3,842,132 | 1,875,000* | 1,967,132 | 8,485,460 | 4,875,000* | 3,610,460 | 14,085,035 | 13,992,239 | 92,796 |
| Specialty Food Stores-4452 | 936,954 | 393,686 | 543,268 | 2,073,329 | 501,741 | 1,571,588 | 3,469,241 | 821,924 | 2,647,317 |
| Beer, Wine and Liquor Stores-4453 | 1,887,515 | 3,438,146 | (1,750,631) | 3,764,464 | 10,096,115 | (6,331,651) | 6,344,487 | 17,699,381 | (11,354,894) |
| Health and Personal Care Stores-446 | 11,280,019 | 990,042 | 10,289,977 | 25,405,665 | 2,809,161 | 22,596,504 | 42,091,892 | 7,645,395 | 34,446,497 |
| Pharmacies and Drug Stores-44611 | 9,244,965 | 129,565 | 9,115,400 | 20,814,373 | 1,847,778 | 18,966,595 | 34,464,279 | 6,182,002 | 28,282,277 |
| Cosmetics, Beauty Supplies, Perfume Stores-44612 | 922,728 | 141,454 | 781,274 | 2,081,512 | 200,955 | 1,880,557 | 3,444,054 | 278,858 | 3,165,196 |
| Optical Goods Stores-44613 | 419,316 | 717,053 | (297,737) | 950,180 | 717,053 | 233,127 | 1,599,396 | 728,409 | 870,987 |
| Other Health and Personal Care Stores-44619 | 693,010 | 1,970 | 691,040 | 1,559,600 | 43,375 | 1,516,225 | 2,584,163 | 456,126 | 2,128,037 |

| Clothing and Clothing Accessories Stores-448 | | | | | | | | | |
|---|------------|------------|-------------|------------|-------------|-------------|------------|-------------|-------------|
| Clothing Stores-4481 | 8,696,155 | 1,651,536 | 7,044,619 | 19,754,541 | 4,651,790 | 15,102,751 | 33,641,945 | 8,426,905 | 25,215,040 |
| Men's Clothing Stores-44811 | 6,550,758 | 1,453,297 | 5,097,461 | 14,851,911 | 3,762,185 | 11,089,726 | 25,241,112 | 5,067,489 | 20,173,623 |
| Women's Clothing Stores-44812 | 292,349 | 104,695 | 187,654 | 654,292 | 282,676 | 371,616 | 1,109,559 | 282,676 | 826,883 |
| Children's, Infants Clothing Stores-44813 | 1,445,199 | 937,183 | 508,016 | 3,292,474 | 3,055,409 | 237,065 | 5,591,293 | 3,961,534 | 1,629,759 |
| Family Clothing Stores-44814 | 359,550 | 0 | 359,550 | 816,974 | 7,492 | 809,482 | 1,400,402 | 114,882 | 1,285,520 |
| Clothing Accessories Stores-44815 | 3,577,491 | 0 | 3,577,491 | 8,097,871 | 0 | 8,097,871 | 13,772,503 | 99,056 | 13,673,447 |
| Other Clothing Stores-44819 | 334,942 | 183,088 | 151,854 | 763,368 | 183,088 | 580,280 | 1,299,484 | 196,165 | 1,103,319 |
| Shoe Stores-4482 | 541,227 | 228,331 | 312,896 | 1,226,932 | 233,520 | 993,412 | 2,067,871 | 413,176 | 1,654,695 |
| Jewelry, Luggage, Leather Goods Stores-4483 | 1,224,985 | 123,903 | 1,101,082 | 2,750,136 | 444,345 | 2,305,791 | 4,683,803 | 1,976,985 | 2,706,818 |
| Jewelry Stores-44831 | 920,412 | 74,336 | 846,076 | 2,152,494 | 445,260 | 1,707,234 | 3,717,030 | 1,382,431 | 2,334,599 |
| Luggage and Leather Goods Stores-44832 | 815,983 | 74,336 | 741,647 | 1,918,790 | 445,260 | 1,473,530 | 3,321,507 | 1,382,431 | 1,939,076 |
| Sporting Goods, Hobby, Book, Music Stores-451 | 104,429 | 0 | 104,429 | 233,704 | 0 | 233,704 | 395,523 | 0 | 395,523 |
| Sporting Goods, Hobby, Musical Inst Stores-4511 | 3,736,730 | 5,730,925 | (1,994,195) | 8,432,063 | 7,883,265 | 548,798 | 14,352,775 | 10,599,001 | 3,753,774 |
| Sporting Goods Stores-45111 | 3,195,306 | 5,730,925 | (2,535,619) | 7,214,190 | 7,883,265 | (669,075) | 12,254,321 | 10,599,001 | 1,655,320 |
| Hobby, Toys and Games Stores-45112 | 2,224,150 | 1,118,773 | 1,105,377 | 5,014,857 | 2,901,358 | 2,113,499 | 8,511,818 | 4,941,639 | 3,570,179 |
| Sew/Needlework/Piece Goods Stores-45113 | 695,489 | 4,418,159 | (3,722,670) | 1,573,056 | 4,640,395 | (3,067,339) | 2,674,541 | 5,215,179 | (2,540,638) |
| Musical Instrument and Supplies Stores-45114 | 100,869 | 53,912 | 46,957 | 227,049 | 188,014 | 39,035 | 382,283 | 228,991 | 153,292 |
| Book, Periodical and Music Stores-4512 | 174,798 | 140,081 | 34,717 | 399,228 | 153,498 | 245,730 | 685,679 | 213,192 | 472,487 |
| Book Stores-451211 | 541,424 | 0 | 541,424 | 1,217,873 | 0 | 1,217,873 | 2,098,454 | 0 | 2,098,454 |
| News Dealers and Newsstands-451212 | 454,752 | 0 | 454,752 | 1,028,752 | 0 | 1,028,752 | 1,782,840 | 0 | 1,782,840 |
| General Merchandise Stores-452 | 86,672 | 0 | 86,672 | 189,121 | 0 | 189,121 | 315,614 | 0 | 315,614 |
| Department Stores Excl Leased Depts-4521 | 23,016,536 | 11,798,183 | 11,218,353 | 51,375,744 | 13,028,617 | 38,347,127 | 85,937,705 | 18,102,695 | 67,835,010 |
| Other General Merchandise Stores-4529 | 11,713,682 | 7,243,411 | 4,470,271 | 26,317,197 | 7,250,032 | 19,067,165 | 44,095,981 | 7,250,032 | 36,845,949 |
| Miscellaneous Store Retailers-453 | 11,302,854 | 4,554,772 | 6,748,082 | 25,058,547 | 5,778,585 | 19,279,962 | 41,841,724 | 10,852,663 | 30,989,061 |
| Florists-4531 | 6,160,404 | 4,478,969 | 1,681,435 | 13,493,961 | 8,694,884 | 4,799,077 | 22,486,010 | 12,870,999 | 9,615,011 |
| Office Supplies, Stationery, Gift Stores-4532 | 275,096 | 216,964 | 58,132 | 623,745 | 293,025 | 330,720 | 1,030,287 | 490,274 | 540,013 |
| Office Supplies and Stationery Stores-45321 | 2,055,966 | 226,138 | 1,829,828 | 4,583,759 | 590,735 | 3,993,024 | 7,718,501 | 1,236,834 | 6,481,667 |
| Gift, Novelty and Souvenir Stores-45322 | 1,181,360 | 53,127 | 1,128,233 | 2,638,013 | 143,442 | 2,494,571 | 4,452,279 | 143,442 | 4,308,837 |
| Used Merchandise Stores-4533 | 874,606 | 173,011 | 701,595 | 1,945,746 | 447,293 | 1,498,453 | 3,266,222 | 1,093,392 | 2,172,830 |
| Other Miscellaneous Store Retailers-4539 | 705,035 | 2,220,425 | (1,515,390) | 1,594,348 | 3,431,593 | (1,837,245) | 2,718,802 | 4,098,262 | (1,379,460) |
| Foodservice and Drinking Places-722 | 3,124,307 | 1,815,442 | 1,308,865 | 6,692,109 | 4,379,531 | 2,312,578 | 11,018,420 | 7,045,629 | 3,972,791 |
| Drinking Places-Alcoholic Beverages-7224 | 21,062,739 | 12,718,077 | 8,344,662 | 46,793,659 | 28,744,642 | 18,049,017 | 78,882,501 | 50,314,469 | 28,568,032 |
| Full-Service Restaurants-722511 | 797,331 | 1,910,543 | (1,113,212) | 1,780,934 | 3,661,821 | (1,880,887) | 3,014,856 | 8,202,415 | (5,187,559) |
| Limited-Service Eating Places-722513 | 11,948,438 | 5,947,534* | 6,000,904 | 26,568,402 | 16,082,821* | 9,485,581 | 44,817,180 | 28,112,054* | 12,705,126 |
| Cafeterias, Grill-Bufferets, and Buffets-722514 | 8,316,970 | 4,860,000* | 3,456,970 | 18,444,323 | 9,000,000* | 9,444,323 | 31,050,465 | 14,000,000* | 17,050,465 |
| Snack and Nonalcoholic Beverage Bars-722515 | 219,119 | 0 | 219,119 | 485,932 | 0 | 485,932 | 818,056 | 0 | 818,056 |
| * Adjusted by Urban Partners | 1,155,291 | 928,932 | 228,359 | 2,562,059 | 4,010,203 | (1,448,144) | 4,313,148 | 7,299,758 | (2,986,610) |

Source: Envision Analytics, Urban Partners

Finally, stores within the 2-mile trade area sell more than **\$204.5 million** worth of retail goods annually, while that trade area's population spends approximately **\$491.4 million** on retail goods annually. This retail spending includes:

- \$110.6 million in Food and Beverage Stores,
- \$85.9 million in General Merchandise Stores,
- \$78.9 million in Eating and Drinking Establishments,
- \$60.6 million in Building Material and Garden Stores,
- \$42.1 million in Health and Personal Care Stores,
- \$33.6 million in Clothing and Accessories Stores,
- \$22.5 million in Miscellaneous Store Retailers,
- \$16.0 million in Furniture and Home Furnishings Stores,
- \$14.4 million in Sporting Goods, Hobby, and Book Stores,
- \$13.9 million in Auto Parts Stores.
- \$13.0 million in Electronics and Appliance Stores, and

Retail Market Potential

A comparison of retail supply and demand for the trade areas (shown in Table 1 above) reveals the retail surplus or gap/potential for additional retail in each trade area that is currently missing and being met elsewhere in the region. This analysis shows that there is a \$69 million opportunity gap – or surplus in retail demand – within the one-mile radius that is compounded at the 1.5- and 2-mile radii, increasing to \$132 million and \$205 million respectively. This means that even at the 2-mile radius, substantial retail spending is leaking to outside this area, occurring for the majority of retail categories. This indicates significant opportunity for retail expansion in Etna.

However, within the context of downtown Etna and specifically the 323-399 block, only certain opportunities are likely to be appropriate for the block because of the size of its building stock and physical spaces. For example, at the 1-mile radius, an opportunity exists for a nursery/garden center and small supermarket, but downtown Etna could not accommodate these larger uses given its smaller scale. Therefore, considering its physical constraints, recommended opportunities specific to the 323-399 block of Butler Street include:

Restaurants

The most significant retail opportunity for downtown Etna is restaurants, including full-service (those with wait staff) and limited service (those with only counter service and/or take-out). Depending on their popularity and success, full-service restaurants can cater to a local population while also serving a much greater region as well. According to the Environics Analytics

data, the gap in restaurants in the one-mile trade area totals \$9.5 million, including a \$6 million gap in full-service restaurants, and a \$3.5 million gap in limited-service restaurants. This excess demand could support more than 17,000 SF of additional sit-down restaurant space - including restaurants with a bar theme, such as a pub, micro-brewery, and/or distillery - and almost 10,000 SF of limited-service restaurant space. Assuming a typical restaurant size of about 3,000 SF, this could translate to 9 new restaurants for downtown Etna, creating the potential for several new restaurants on the 323-399 block of Butler Street.

Considering the prospect of three new restaurants in downtown Etna, up to 40 to 50% of the \$9.5 million (27,000 SF) in total restaurant opportunity could be captured once they open for business. However, there will still be a significant opportunity for additional restaurants, both full- and limited-service. The new attention being focused on downtown Etna resulting from these new restaurants could provide momentum for attracting the remaining unmet demand for additional restaurants. We should note that the gap in full-service restaurant supply grows to more than \$16 million at the 1.5-mile radius and \$28 million at the 2-mile radius.

Gifts & Jewelry Niche

The Environics data suggests that \$702,000 in "gift, novelty, and souvenir stores" expenditures are leaking from the 1-mile trade area annually. At the 1.5-mile radius this doubles to \$1.5 million, though slightly more oriented to gifts. This leakage can support 3,000 SF in gift shops. The 1-mile radius trade area is also experiencing leakage of \$742,000 in jewelry store expenditures, which could support a 2,000 SF store. A small cluster of such store types could be a good opportunity for downtown Etna.

Clothing & Shoe Stores

Despite limited opportunities for the expansion of several categories of clothing at the 1-mile radius trade area level, the supply of family clothing stores within this trade area is not satisfying the significant demand. The data suggests a gap of more than \$3.5 million, which could support about 12,000 SF of store space. This gap grows to \$13.7 million at the 2-mile radius.

Opportunity exists for additional related stores in the "shoe stores" category as well. The Environics data identifies \$2.1 million in expenditures leaking from the 1-mile radius trade area, amounting to about 4,000 SF of additional store space.

Pharmacy/Drug Store

The data suggests a \$14.3 million gap in the supply of pharmacies/drug stores at the 1-mile radius level, sufficient to support a new 12,000 SF store.

While there is a Rite Aid in Shaler Plaza, about a mile from the 323-399 block of Butler Street, the closest CVS is beyond even the 2-mile radius – a distance at which the gap in pharmacy/drug store supply grows to \$28.2 million.

Overall Retail Potential

Combined, the strongest near-term retail opportunities for capturing unmet needs at the Etna 1-mile radius trade area that are appropriate for the 323-399 block of Butler Street include:

- 17,000 SF in full-service restaurants (including approximately 9,000 SF in proposed new restaurants);
- 10,000 SF in limited-service restaurants;
- A 3,000 SF gift shop and 2,000 SF jewelry store;
- 12,000 SF in family clothing store space and 4,000 SF in shoe stores; and
- A 12,000 SF drug store.

Together, these opportunities could add about 60,000 SF of retailing to downtown Etna, including the 323-399 block of Butler Street. Aside from a new drug store that would likely require a new building, these retail opportunities are more than sufficient to fill the existing 19,000 SF of vacant storefront space on the block.