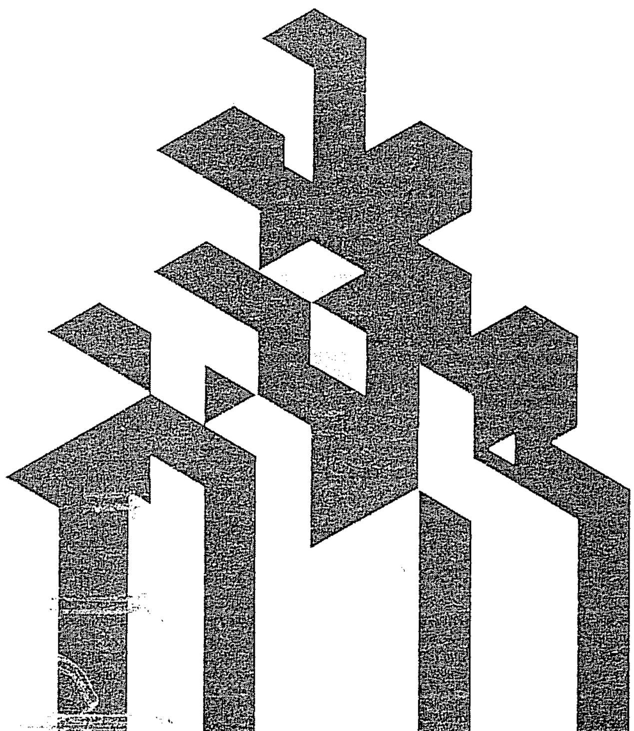
Commercial Revitalization and Economic Development Strategies

for The Southeast Gainesville Urban Area



Consultant:
PLANTEC Corporation

COMMERCIAL REVITALIZATION

AND

ECONOMIC DEVELOPMENT STRATEGIES

FOR

THE SOUTHEAST GAINESVILLE

URBAN AREA

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EXECUTIVE SUMMARY

The following discussion presents the major findings and conclusions of the Southeast Gainesville Economic Development and Commercial Revitalization Study. The major impetus for the study was the growing concern for the lack of development and growth in the southeastern portion of the county. The county's western growth surge, coupled with the recent downtown revitalization efforts, formed the basis for the following study objectives:

- Assess the market potentials in the southeast Gainesville area for retail, service, and other viable commercial uses; and identify the area's role in meeting the local residents' commercial and personal service needs
- Identify consumer buying attitudes and perceptions of the southeast Gainesville area
- Identify, on a preliminary basis, those specific manufacturing industries that would be suitable to the southeast Gainesville area
- Develop strategies that would help foster economic development and commercial revitalization efforts in the southeast Gainesville area.

Major sections of the report include: a socioeconomic overview; a retail market assessment and analysis of a household/consumer survey; a preliminary target industry analysis; an existing conditions analysis which profiles community resources and the infrastructure system; identification of alternative financing and funding programs; and implementation strategies which enhance economic development and commercial revitalization opportunities in the southeast Gainesville area.

The following is a summary of key elements, findings, and conclusions for each section of the report as they pertain to the southeast Gainesville area.

SOCIOECONOMIC CHARACTERISTICS

The following information summarizes the socioeconomic characteristics of the study area:

- Population in the southeast Gainesville area is anticipated to decline at an average annual rate of 1.88 percent from a current estimate of 17,500 people in 1985 to approximately 15,800 people in 1990.
- During the period of 1990 through 1995, the population will stabilize at approximately 15,800 people.
- The population's age distribution within the southeast Gainesville study area is shifting towards the older age categories.
- The racial composition in the southeast Gainesville study area has shifted, with the white population decreasing almost 16 percent from 1970 to present.
- While the number of households is declining, the persons per household ratio will remain higher than the state and national trends for the projection period.
- The area's median household income ($15,000 in 1985) was only ten percent lower than the 1984 county figure of $16,500.

- There is a high "real" unemployment rate not reflected in the published unemployment rate for the study area. PLANTEC projects this rate to be approximately 20 to 30 percent. This is based on a proportion of the labor force classified as discouraged workers--which is generally not included in the typical unemployment calculation.
- Compared to the county, there is a higher percentage of the labor force in the study area engaged in occupations which are typically compensated with a lower wage scale.
- A majority of the labor force residing in the study area have jobs within Gainesville's metropolitan area.
- PLANTEC estimates that over 1,200 persons are employed in the study area with approximately 45 percent working in the retail sector.
- There is a high incidence of working mothers residing in the study area.

RETAIL MARKET ANALYSIS

PLANTEC estimates that the study area currently has approximately 134,800 square feet of retail space. This space is comprised of the identified convenience and shoppers' goods which are considered to be the major categories of consumer purchases. The total supply of retail space serving the study area is estimated at 217,200 which includes some 82,400 square feet outside of, but servicing residents in, the study area.

The total demand for retail space by 1990 is estimated to be 237,200 square feet which translates to a net additional demand of approximately 20,000 square feet. It is important to point out that this analysis considered competitive locations of other retail stores at the perimeter of the study area. While a market potential for a community or neighborhood shopping center does not presently exist, the consultant feels that there is a potential for one or possibly two retail centers in the 5,000-to-10,000-square-foot range. This type of a retail center could accommodate stores in the 1,000-to-3,000-square-foot range for small retail and personal service establishments.

The survey results indicated a need for additional restaurants for servicing local neighborhood residents, a discount drug store, a hardware store, and possibly a small apparel/shoe store. Additionally, a desire for medical services, laundromats, and beauty parlors was also expressed. The type of development concept envisioned for these retail centers would be commercial and personal service store-front space clustered into a single shopping center structure or strip development.

TARGET INDUSTRY IDENTIFICATION

PLANTEC conducted a preliminary target industry identification analysis based on nine specific locational criteria which best characterized the needs of the study area. Once these criteria were applied, the following two separate lists of industries at the four-digit SIC level were identified:

--Women's, misses', and junior apparel products (2335, 2337)

--Curtains, draperies, and related housefurnishing products (2391, 2392)

--Costume jewelry and novelties, except precious metal (3961); and

--Burial caskets (3995).

This first set of industries met at <u>least</u> seven of the general screening criteria and employed, on average, less than 50 but more that 25 people.

Another list was produced which met <u>six</u> of the general screening criteria and also employed the same range of people. This secondary list included 13 firms at the four-digit SIC level with the following major product descriptions:

--Carpets and rugs, not elsewhere classified (2279)

--Paddings and upholstery filling (2293)

--Processed waste and recovered fibers and flock (2294)

--Textile goods, not elsewhere classified (2299)

--Mens', youths', and boys' neckwear (2323)

--Leather and sheep-lined clothing (2386)

--Apparel belts and accessories, not elsewhere classified (2387, 2389)

--Textile bags (2393)

--Leather tanning and finishing products (3111)

--Musical instruments (3931)

--Lead pencils, crayons, and artists' materials (3952); and

--Brooms and brushes (3991).

The preliminary finding is that favorable conditions exist for possible recruitment of these two groups of industries (the second group to a lessor degree) to locate in the southeast Gainesville area. However, the need for a more detailed analysis and specific marketing program in this regard cannot be overemphasized.

COMMUNITY RESOURCES AND FACILITIES

PLANTEC identified and profiled the following 12 major community organizations which provide services to the residents of the study area: Santa Fe Community College, Job Corps, Job Service, Adult Agri-Business Center, Focus on Careers, Focus on Women, Senior Community Development Employment Services, Gainesville Community Ministries, United Gainesville Community Development Corporation, Central Florida Community Action Agency, Neighborhood Improvement Program, and the 4 C's Day Care Center. Additionally, public schools and parks located in or serving the area residents were inventoried.

The infrastructure system was also assessed in terms of its general adequacy in promoting and facilitating economic development in the study area. Perhaps the strongest asset of the area lies in the existing transportation network which provides good access to the I-75 corridor, is well served by local arterials and is in close proximity to the city's regional airport. Moreover, there is excess capacity in the centralized water and sewer systems with trunk line location and availability being the major constraint to future development.

ALTERNATIVE FUNDING SOURCES

PLANTEC identified the following programs that are available to assist the southeast Gainesville area in the potential funding of its economic development program and strategies: U.S. Farmers Home Administration (FmHA)/Community Facilities Loan Program, Long-Term Economic Deterioration Program (LTED) Sudden and Severe Economic Dislocation Program (SSED), Public Works and Development/Facilities Grants, Land and Water Conservation Fund Program, Florida Recreation Development Assistance Program, Urban Park and Recreation Recovery

Program, Industrial Revenue Bonds, Small Business Administration 503 Loan Program, Economic Opportunity Loans, Small Business Administration Guaranteed Loan Program, Section 312 Rehabilitation Loans, and the United Gainesville Community Development Corporation Revolving Loan Fund. While this list is not exhaustive, it does represent the major sources of assistance available to eligible communities and projects.

It should also be mentioned that PLANTEC explored the feasibility of establishing a Tax Increment Financing District, but it does not appear to be a viable option at this time. The primary reasons for this include:

1) Jurisdictional boundaries of the study area (a number of implicit legal and planning issues would need to be resolved if the designated area crossed jurisdictional boundaries).
2) Preliminary considerations including the size of the district, the nominal demand for new commercial activity, and the lower value of real estate (as compared to the rest of the city/county) would provide a minimal amount of tax increment revenues.
3) There are already two existing districts in or near the city's CBD.
4) Although this study provides a good data base for determining blighted conditions, the overall requirements of Chapter 163 Florida Statutes, would still have to be met including blight documentation and a physical/land use plan for the area.

Generally speaking, the overall effort needed to satisfy state requirements--coupled with the cross jurisdictional issue--would more than likely not be worth the anticipated increment revenues that would accrue from the district.

REVITALIZATION AND DEVELOPMENT STRATEGIES

Specific locations for commercial and industrial projects were identified based on an assessment of highway access and visibility, available utilities, proper zoning, and the necessary "critical mass" to support new development. As pointed out in Figure 6, the nucleus for potential development/redevelopment sites is the Waldo Road/University Avenue general area.

Specific recommendations to the Policy Advisory Committee (PAC) to foster commercial revitalization and economic development in the southeast Gainesville area include:

- Establish a task force from the existing PAC members to implement the strategies outlined in the report
- Assure that the southeast Gainesville area's interests are adequately represented on the proposed "Alachua County Economic Development Commission" and/or the proposed Visions 2000 "Improved Economic Opportunity Council"
- Monitor the current target industry analysis at the regional and county level for its application to the southeast Gainesville area
- Assign a task force member to work closely with the Chamber and City/County officials in recruiting selected industries for the southeast Gainesville area

- Develop specific marketing goals and a program that can be incorporated into the county's annual marketing program which emphasize the special attributes of the southeast Gainesville area (i.e. lower real estate prices, transportation strengths, available development financing, etc.)
- Pursue EDA or other available implementation grant funds for the southeast Gainesville program area
- Focus on the retention and expansion of existing businesses and encourage revitalization of vacant buildings in the study area through available financing techniques such as the UGCDC Revolving Loan Fund
- Work with the local governments to establish a development incentive program that would encourage redevelopment and create new jobs through a public/private partnership (i.e. equity participation agreements or participatory leases for private sector development of government-owned property in study area)

SECTION I

INTRODUCTION

BACKGROUND/OBJECTIVES

During the past decade, most of the commercial and residential growth in the Gainesville urban area has occurred in the western sectors of the city. This westward growth trend has primarily been a function of the following:

- Physical location of the University of Florida and Santa Fe Community College on that side of town
- Proximity to the I-75 corridor and the area's major shopping complexes--Oaks, Gainesville and Creekside malls
- Area's major medical facilities, which provide a very strong employment base, are also located in the western sectors
- Major new commercial corridors on the west side of town, such as Millhopper Road, are experiencing rapid development.

This evident growth pattern, along with the recent downtown revitalization efforts, has created some formidable obstacles for commercial and economic development in the southeast Gainesville area.

Because the study area crosses jurisdictional boundaries and its stagnated growth was a communitywide concern, an Economic Development Administration grant was awarded to the North Central Florida Regional Planning Council to study the issues. The council then established a policy advisory committee comprised of various community and public officials to oversee the project. PLANTEC was retained in early-1986 to provide a commercial feasibility and revitalization study for the area. The initial charge was to also look specifically at the redevelopment potential for the Alavac Shopping Center; however, during the course of the study this site was sold and no longer was considered for future commercial use. Based on an expressed interest of the advisory committee members, PLANTEC conducted a preliminary target industry analysis as the basis for formulating an economic development strategy for the southeast Gainesville area. Additionally, a household and consumer survey was undertaken in joint cooperation with the Central Florida Community Action Agency, North Central Florida Regional Planning Council, and the consultant.

Considering the above background, the information, analyses and recommendations in this report are based on the following objectives:

- Assess the market potentials in the southeast Gainesville area for retail, service, and other viable commercial uses; and identify the area's role in meeting the local residents' commercial and personal service needs
- Identify consumer buying attitudes and perceptions of the southeast Gainesville area
- Identify, on a preliminary basis, those specific manufacturing industries that would be suitable to the southeast Gainesville area
- Develop strategies that would help foster economic development and commercial revitalization efforts in the southeast Gainesville area.

This study was undertaken in accordance with the terms and conditions set forth in the contract between PLANTEC and the North Central Florida Regional Planning Council.

REPORT ORGANIZATION

This introductory section discusses the purpose and background for the report. It also presents the major objectives of the study, describes the study area and its location and covers the limitations for this report. Section II presents a socioeconomic overview focused on the population trends and employment characteristics of the southeast Gainesville area. A retail market assessment and analysis of the household and consumer survey results are contained in Section III.

Section IV presents the results of the target industry analysis with emphasis on an evaluation of the area's geographic attributes and how they apply to industry location requirements. Specific industries are identified that would be favorable candidates for location to the southeast Gainesville area.

The community's recreational, educational, and resource base is highlighted in Section V. This includes an analysis of the capacity and existing conditions of the infrastructure system, along with assessments of their general adequacy in promoting and facilitating economic development in the study area.

Section VI identifies and profiles alternative financing and funding mechanisms available for the implementation of an economic development program for the southeast Gainesville area. Finally, opportunities for economic development and commercial revitalization are identified in Section VII. Specific site locations are presented for industrial concerns and potential redevelopment projects. A list of specific implementation actions concludes this section.

LIMITATIONS OF ANALYSIS

PLANTEC does not warrant projected retail and commercial demand estimates, as the accuracy of information received from various secondary sources concerning the market shares for the study area cannot be guaranteed. Moreover, the ultimate success of the redevelopment efforts in the southeast Gainesville area is dependent on a variety of factors beyond the control of PLANTEC Corporation, including but not limited to: (1) uncertainties in the national and regional (Gainesville Metropolitan area) economies; and (2) the political climates of Gainesville and Alachua County.

However, assessments and recommendations presented herein represent the best judgment of the firm based on information gathered within the scope of this assignment. PLANTEC cannot overemphasize the importance of public/private sector cooperation in implementing the recommended strategies geared towards the economic development and commercial revitalization efforts for the southeast Gainesville area.

SITE LOCATION AND DESCRIPTION

Situated in the southeastern portion of city and county, the study area is comprised of Census Tracts (CT) 5, 6, and 7 of the Gainesville MSA. As Figure 1 indicates, the study area's southern boundary--for the most part--runs along the northern edge of Paynes Prairie and extends from the intersection of SE 16th Avenue/South Main Street to State Highway 20 (Hawthorne Road). It then runs north along Hawthorne Road to SE 43rd Street and follows 43rd Street to the city limits which meanders around Morningside Park. It then runs westward just south of the Sunland Training Center to NE 16th Avenue and continues along 16th Avenue to the west boundary of CT 5 (NE 2nd Street). It follows CT 5's

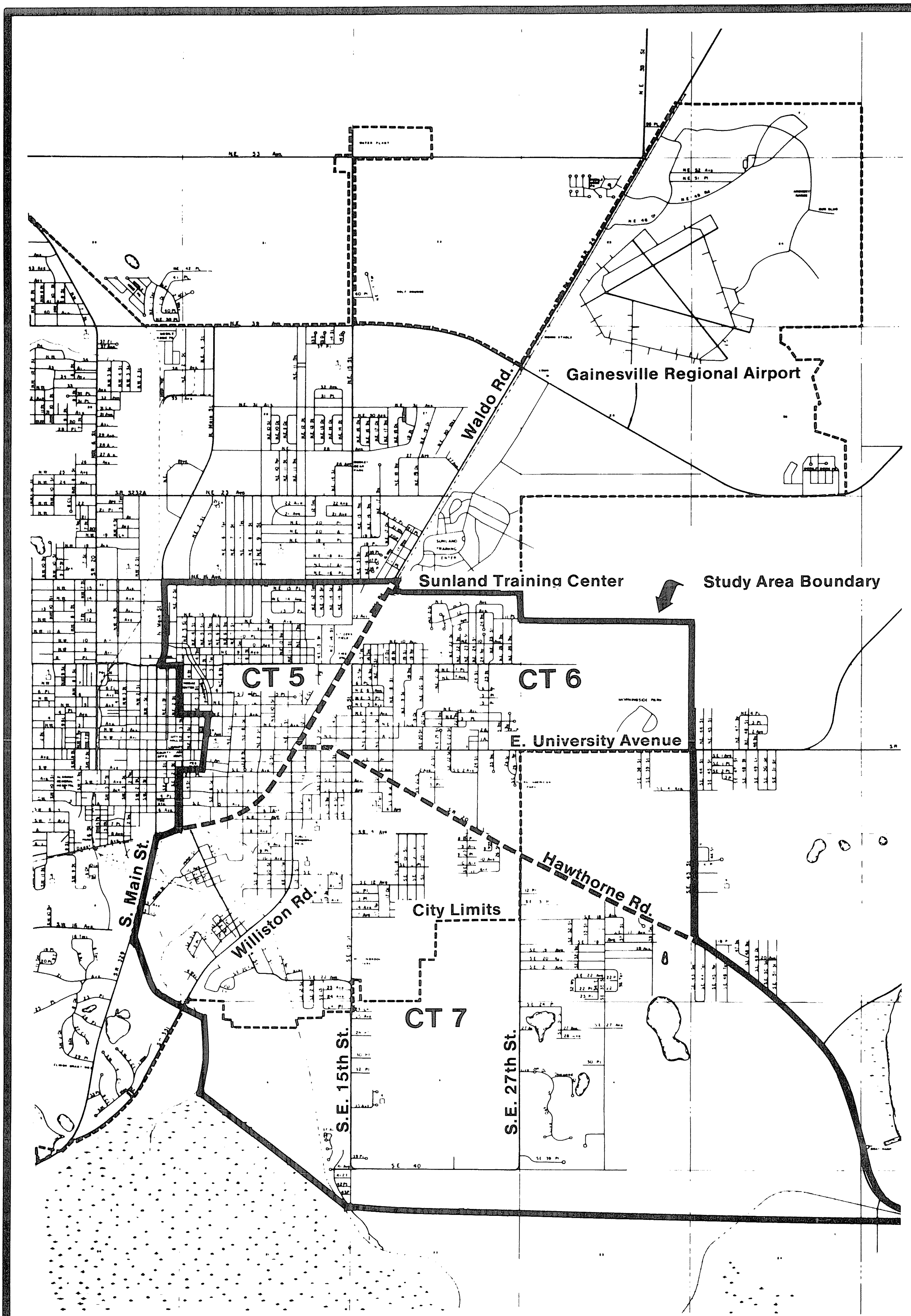

Figure 1

Location Map, Southeast Gainesville Revitalization Study Area

SOURCE: PLANTEC, 1986.

western boundary south down to S.R. 24 and proceeds westward to South Main Street. It then follows Main Street down to SE 16th Avenue.

The entire area is over 15 square miles and can be generally characterized as being half urban and half rural in nature. The urban section is predominately within the incorporated city limits of Gainesville, while most of the rural section lies in the southeastern portion of Alachua County. Portions of CT 5, 6, and 7 are also within the city's pocket of poverty boundaries.

The study area is in close proximity to Gainesville's regional airport on North Waldo Road and has good access to I-75 via the Williston Road and 39th Avenue corridors. University Avenue is the major east/west arterial and divides the urban portion into north and south sectors. A more detailed assessment of the study area's transportation facilities is contained in Section V.

SECTION II

SOCIOECONOMIC OVERVIEW

The following section discusses population trends and employment characteristics within the southeast Gainesville study area. This information is intended to serve as an overview for both the present condition and future directions of the study area. The study area is comprised of Census Tracts 5, 6 and 7 which form the basis for the data and subsequent analyses that follow. Analyzed in this section are the characteristics of the residents living in each census tract and the study area as a whole. Future population projections are also made for each census tract. Other major areas covered include household, income, employment, and employment-related information.

Where pertinent, these characteristics and trends are compared to those in Alachua County, in order to determine whether they are unique to the southeast sector or generally reflect county trends.

POPULATION TRENDS

Southeast Gainesville's population growth trends are in direct conflict with those occurring in the county as a whole. From 1970 to 1980, the county's population increased by 4,660 persons per year or 4.45 percent (Table II-1). However, southeast Gainesville increased by only 133 persons annually or by less than one percent. In the following five years, the area's population experienced a 1.47-negative annual growth rate losing some 276 persons per year. Therefore, during this 15-year period, southeast Gainesville's population remained relatively stable with the recent declining trend offsetting the growth in the seventies. This current trend is even more dramatic when analyzing the area's loss of its proportional share of the county's total population,

Table II-1. Population Trends and Projections, by Census Tract, 1970-1995

Census Tract	1970	1980	1985	1990	1995	Annual Percentage Changes			
						1970-1980	1980-1985	1985-1990	1990-1995
5	4,940	4,688	4,184	3,641	3,650	-0.51%	-2.15%	-2.60%	0.05%
6	4,141	4,876	4,373	3,793	3,800	1.77%	-2.06%	-2.65%	0.04%
7	8,404	9,252	8,880	8,362	8,400	1.01%	-0.80%	-1.17%	0.09%
Total	17,485	18,816	17,437	15,796	15,850	0.76%	-1.47%	-1.88%	0.07%
Alachua County	104,764	151,369	172,900	192,200	208,800	4.45%	2.84%	2.23%	1.73%

Sources: Donnelly Marketing Information Services.
University of Florida, Bureau of Economic and Business Research, 1986.
PLANTEC Corporation, 1986.

which fell from 16.7 percent in 1970 to 10.1 percent in 1985. Since there is a good supply of developable land in this area, this information is an indication of stagnated growth.

PLANTEC projects the population for the study area to continue this downward trend. We believe that in 1990 the study area population will be approximately 15,800. The out-migration of population will continue, especially in Census Tracts 5 and 6, where it is projected that a two-percent decrease in population will occur.

In 1995, the population is projected to remain stable at 15,800. The out-migration of population within each census tract is likely to diminish, stabilizing the study area's population between 15,000 to 16,000 people. This projection is primarily based on an analysis of information provided by the local post office which tracks residential deliveries by carrier routes. According to the post office data, there was an average annual 1.68-percent decrease in households from 1983 to 1986. This downward trend reflected by the postal data corroborates PLANTEC's population and household trends and projections for the study area. (Note: Population estimates were based on 2.5 persons per household.)

AGE AND SEX TRENDS

PLANTEC investigated the characteristics of the population residing in the study area to identify trends which would affect the purchasing power and characterize the necessity to provide additional services to meet the population's needs. The age distribution trends occurring from 1970 to 1985 are similar to the national trends. As Table II-2 shows, the area has experienced an aging of the populace with the percentage of the population under 18 years declining from 38

Table II-2. Population by Age and Sex, for Total Study Area, 1970-1985

Age	1970				1980				1985				Total Annual % Change	
	Male	Female	Total	Percent	Male	Female	Total	Percent	Male	Female	Total	Percent	1970-1980	1980-1985
0-5	1,089	1,089	2,178	12.5%	934	931	1,865	9.9%	889	845	1,734	9.9%	-1.44%	-1.40%
6-13	1,655	1,527	3,182	18.2	1,253	1,265	2,518	13.4	1,095	1,093	2,188	12.5	-2.09%	-2.62%
14-17	665	758	1,423	8.1	750	783	1,533	8.1	554	570	1,124	6.4	0.77%	-5.34%
18-24	1,252	1,365	2,617	15.0	1,357	1,574	2,931	15.6	1,125	1,157	2,282	13.1	1.20%	-4.43%
25-34	1,122	1,229	2,351	13.4	1,659	1,918	3,577	19.0	1,646	2,033	3,679	21.1	5.21%	0.57%
35-44	755	911	1,666	9.5	772	1,012	1,784	9.5	1,019	1,157	2,176	12.5	0.71%	4.39%
45-54	714	868	1,582	9.0	740	855	1,595	8.5	607	754	1,361	7.8	0.08%	-2.93%
55-64	550	705	1,255	7.2	613	786	1,399	7.4	556	760	1,316	7.5	1.15%	-1.19%
65 +	509	722	1,231	7.0	653	961	1,614	8.6	622	955	1,577	9.0	3.11%	-0.46%
Total	8,311	9,174	17,485	100.0	8,731	10,085	18,816	100.0	8,113	9,324	17,437	100.0	0.76%	-1.47%

Sources: Donnelly Marketing Information Services.
PLANTEC Corporation, 1986.

percent in 1970 to 29 percent in 1985. The percentage of the population between 18 and 54 years of age rose from 47 percent in 1970 to 55 percent in 1985. Additionally, the proportion of population aged 55 and over grew from 14 percent in 1970 to 16.5 percent in 1985.

Of the three census tracts, Census Tract 5 has had a greater percentage (63) of its population within the 18 to 54 year old range. This age group primarily makes up the labor force and subsequently has the greatest buying power.

There are no significant trends in the ratio of males to females in the study area. All three census tracts reflect the 1985 ratio that exists in the study area as a whole. Approximately 47 percent and 53 percent of the population were male and female respectively.

Characterizing the age and sex trends within the southeast Gainesville study area, we have concluded that the populous is growing older and that a significant out-migration of the younger population is evident.

RACIAL CHARACTERISTICS

In analyzing the racial composition of the study area and the three census tracts, several trends are readily apparent. The southeast Gainesville area has gone from a racial composition of 53 percent white and 46 percent black in 1970 to 38 and 62 percent respectively in 1985 (Table II-3).

Between 1970 and 1980, the white population decreased by an average of 135 persons per year. From 1980 to 1985, estimates show an average annual loss of approximately 284. Conversely, the black population grew by an average of 257 persons per year from 1970 to 1980. However, during the next five years the black population remained

Table II-3. Population by Race, by Census Tract and the Study Area, 1980-1985

Census Tract #	1970		1980		1985		Change 1970 - 1980		Change 1980 - 1985	
	Number	Percent	Number	Percent	Number	Percent	Number	Percent	Number	Percent
CT 5										
White	4,826	97.7%	4,182	89.2%	3,531	84.4%	(644)	-13.3%	(651)	-15.6%
Black	94	1.9%	445	9.5%	594	14.2%	351	373.4%	149	33.5%
Other	20	0.4%	61	1.3%	59	1.4%	41	205.0%	(2)	-3.3%
Total	4,940	100.0%	4,688	100.0%	4,184	100.0%	(252)	-5.1%	(504)	-10.8%
CT 6										
White	1,031	24.9%	556	11.4%	251	5.7%	(475)	-46.1%	(305)	-54.9%
Black	3,106	75.0%	4,296	88.1%	4,104	93.8%	1,190	38.3%	(192)	-4.5%
Other	4	0.1%	24	0.5%	18	0.4%	20	500.0%	(6)	-25.0%
Total	4,141	100.0%	4,876	100.0%	4,373	100.0%	735	17.7%	(503)	-10.3%
CT 7										
White	3,471	41.3%	3,238	35.0%	2,776	31.5%	(233)	-6.7%	(462)	-14.3%
Black	4,925	58.6%	5,958	64.4%	6,044	68.5%	1,033	21.0%	86	1.4%
Other	8	0.1%	56	0.6%	60	0.7%	48	600.0%	4	7.1%
Total	8,404	100.0%	9,252	100.0%	8,820	100.0%	848	10.1%	(432)	-4.7%
Study Area										
White	9,328	53.3%	7,976	42.4%	6,558	37.6%	(1,352)	-14.5%	(1,418)	-17.8%
Black	8,125	46.5%	10,699	56.9%	10,742	61.6%	2,574	31.7%	43	0.4%
Other	32	0.2%	141	0.7%	137	0.8%	109	340.6%	(4)	-2.8%
Total	17,485	100.0%	18,816	100.0%	17,437	100.0%	1,331	7.6%	(1,379)	-7.3%

Sources: Donnelly Marketing Information Services.
PLANTEC Corporation, 1986.

basically constant, increasing by only an average of nine persons per year.

These trends reveal several important changes in the racial composition within each census tract. Historically, Census Tract 5 has had the greatest proportion of the study area's white population with approximately 28 percent in 1970, 22 percent in 1980 and 20 percent in 1985. Census Tract 7 remained the most racially balanced tract in the study area, however, the racial composition has shifted from 41.3-percent white and 58.6-percent black in 1970 to 31.5-percent white and 68.5-percent black in 1985.

Census Tract 6 has experienced an even greater proportional out-mitigation of its white population. From 1980 to 1985, the white population has decreased approximately 55 percent, while the black population has increased by approximately 32 percent, resulting in a net increase of six percent of its total population.

To characterize the study area, PLANTEC finds the southeast Gainesville area undergoing a transition from a predominantly white to a predominantly black racial composition. This trend is evident as the percentage of white persons has steadily declined from 53.3 in 1970 to 37.6 in 1985. Conversely, the black population has gained over 2,600 people, reflecting an increase from 46.5 percent in 1970 to 61.6 percent in 1985. Overall, the study area has maintained a stable population base losing only 48 persons during the 1970 to 1985 period.

HOUSEHOLD TRENDS

There are approximately 6,200 households within the southeast Gainesville study area. This is a reduction of approximately 360 households from those reported in the 1980 Census. The loss in total number of households correlates with the reduction in population, experienced due to the out-migration of people from various portions of the study area. Table II-4 presents information regarding household data by individual census tract, revealing that each individual census tract has lost households during the last five-year period. We estimate that between 100 to 200 households have been lost in Census Tracts 5 and 6 respectively and approximately 50 in Census Tract 7.

In 1985, Tracts 6 and 7 had the highest persons per household ratio of 3.23 and 3.07 respectively. These figures are approximately 13 and eight percent higher than the 2.81 persons per household average for the entire study area. Census Tract 5 had the lowest persons per household ratio at 2.13 which is also lower than the county's.

Generally speaking, the study area is following the national trend toward smaller families. However, Census Tracts 6 and 7 retain larger family sizes than is typically found in the county and state.

As Table II-5 shows, PLANTEC projects that by 1990, the total number of households will decrease further to approximately 5,650 and stabilize during the period of 1990 through 1995, at approximately 5,640. We anticipate that the number of persons per household will continue to be greater than the county and state trends, but less than what is currently estimated in 1985. More specifically, the persons per household figure should drop to the range of approximately three persons per household in Census Tracts 6 and 7, and approximately two persons per household in Census Tract 5.

INCOME

The current median family income, within the southeast Gainesville study area, is estimated to range between $13,000 and $22,300 per

Table II-4. Household Data by Census Tract, 1970 - 1985

Census Tract #	1970			1980			1985			Change 1970 -1980			Change 1980 -1985		
	Total # Households	Household Population	Persons Per Household	Total # Households	Household Population	Persons Per Household	Total # Households	Household Population	Persons Per Household	Total # Households	Household Population	Persons Per Household	Total # Households	Household Population	Persons Per Household
CT 5	1,832	4,877	2.66	2,139	4,665	2.18	1,952	4,161	2.13	307	(212)	-0.48	(187)	(504)	-0.05
CT 6	1,186	4,128	3.48	1,476	4,876	3.30	1,354	4,373	3.23	290	748	-0.18	(122)	(503)	-0.07
CT 7	2,273	8,306	3.65	2,950	9,252	3.14	2,897	8,880	3.07	677	946	-0.52	(53)	(372)	-0.07
Total	5,291	17,311	3.27	6,565	18,793	2.86	6,203	17,414	2.81	1,274	1,482	-0.41	(362)	(1,379)	-0.06
Alachua County	31,115	95,112	3.06	54,607	141,978	2.60	64,566	162,061	2.51	23,492	46,866	-0.46	9,959	20,083	-0.09

Sources: Donnelly Marketing Information Services.
University of Florida, Bureau of Economic Business Research.
PLANTEC Corporation, 1986.

Table II-5. Household Trends and Projections, by Census Tract, 1970 - 1995

Census Tract	1970	1980	1985	1990	1995	Annual Percent Change 1970-80	1980-85	1985-90	1990-95
5	1,832	2,139	1,952	1,713	1,710	1.68%	-1.75%	-2.45%	-0.04%
6	1,186	1,476	1,354	1,185	1,180	2.45%	-1.65%	-2.50%	-0.08%
7	2,273	2,950	2,897	2,753	2,750	2.98%	-0.36%	-0.99%	-0.02%
Total	5,291	6,565	6,203	5,651	5,640	2.41%	-1.10%	-1.78%	-0.04%

Sources: Donnelly Marketing Information Services.
PLANTEC Corporation, 1986.

family. There is a wide variation in median family incomes within each census tract. Information presented in Table II-6 shows that the median family income is $23,300 per family in Census Tract 5, $18,900 in Census Tract 7, and only $13,000 in Census Tract 6.

For the years 1980 through 1985, the national rate of increase in family income was approximately ten percent. In each of the census tracts, the percentage increase was approximately seven to eight percent or two percent less than the national trend.

Information concerning the distribution of households by income levels is presented in Table II-7. As shown, almost one-third or over 1,950 households in the study area fall within the $15,000-$24,999 income range. It is also interesting to point out that 25 percent of all households are in the lowest income category--under $7,499. The study area breakdown also indicates that the median household income of $15,000 is slightly below the county's 1984 figure of $16,500.

With approximately 61.2 percent of its households below $15,000, Census Tract 6 has the greatest proportion of lower income households. Census Tracts 5 and 7 have 46.4 and 45.3 percent, respectively, of their households falling within this lower income range. Only seven percent or some 440 households in the study area have incomes greater than $35,000.

EMPLOYMENT

Current unemployment in Gainesville is estimated at three to four percent, and in the southeast Gainesville area, the rate ranges between three to five percent. The total available labor force is estimated at approximately 13,700 people. As indicated in Table II-8, approximately 40 percent of the study area's population is either unemployed or

Table II-6. Aggregate Household and Family Income, by Census Tract, 1970-1985

Census Tract #	1970 Income			1980 Income			1985 Income			Annual % Change 1970-1980			Annual % Change 1980-1985		
	Median Family	Median Household	Aggregate Household $ (000)	Median Family	Median Household	Aggregate Household $ (000)	Median Family	Median Household	Aggregate Household $ (000)	Median Family	Median Household	Aggregate Household	Median Family	Median Household	Aggregate Household
CT 5	---	$7,207	$16,760	$16,204	$11,712	$30,820	$22,334	$16,143	$35,130	NA	6.25%	8.39%	7.57%	7.57%	2.80%
CT 6	---	$4,921	$6,470	$9,359	$8,506	$22,250	$13,048	$11,859	$19,690	NA	7.29%	24.39%	7.88%	7.88%	-2.30%
CT 7	---	$5,680	$14,720	$13,833	$11,967	$43,340	$18,902	$16,353	$52,890	NA	11.07%	19.44%	7.33%	7.33%	4.41%
Total	---	NA	$37,950	NA	NA	$96,410	NA	NA	$107,710	NA	NA	15.40%	NA	NA	2.34%
Alachua County	---	$7,058			$12,354			$16,500			7.50%			6.71%	

Sources: Donnelly Marketing Information Services.
PLANTEC Corporation, 1986.

Table II-7. Household Income for Total Study Area by Census Tracts, 1985

Income Level	Census Tract 5		Census Tract 6		Census Tract 7		Total	
	Households	% Total	Households	% Total	Households	% Total	Households	% Total
$0 - $7,499	405	20.7%	471	34.8%	672	23.2%	1,548	25.0%
$7,500 - $9,999	230	11.8%	115	8.5%	255	8.8%	600	9.7%
$10,000 - $14,999	271	13.9%	242	17.9%	385	13.3%	898	14.5%
$15,000 - $24,999	587	30.1%	364	26.9%	1,011	34.9%	1,962	31.6%
$25,000 - $34,999	307	15.7%	110	8.1%	339	11.7%	756	12.2%
$35,000 - $49,999	109	5.6%	43	3.2%	148	5.1%	300	4.8%
$55,000 +	43	2.2%	9	0.7%	87	3.0%	139	2.2%
Total	1,952	100.0%	1,354	100.0%	2,897	100.0%	6,203	100.0%

Note: Percent's may not add to 100% due to rounding.

Sources: Donnelly Marketing Information Services
PLANTEC Corporation, 1986.

Table II-8. Employment / Unemployment Status by Census Tract, 1985.

Labor Force	Census Tract 5		Census Tract 6		Census Tract 7		Total All Tracts	
	Number	Percent	Number	Percent	Number	Percent	Number	Percent
Armed Forces	6	0.15%	0	0.00%	13	0.20%	19	0.14%
Civilian								
Employed	2,511	62.14%	1,848	56.90%	3,806	59.21%	8,165	59.52%
Unemployed	127	3.14%	174	5.36%	323	5.02%	624	4.55%
Not in Labor Force	1,397	34.57%	1,226	37.75%	2,286	35.56%	4,909	35.79%
Total	4,041	100.00%	3,248	100.00%	6,428	100.00%	13,717	100.00%

Sources: Donnelly Marketing Information Services.
PLANTEC Corporation, 1986.

currently not classified within the labor force. Only 59 percent of the labor force is currently employed.

Unemployment rates appear to correlate well with the county averages, while the number of individuals not included in the labor force is cause for concern. PLANTEC believes that a large portion of these individuals are people who have exhausted unemployment programs and are discouraged and no longer seek employment. Once an individual discontinues efforts to seek employment with state job services, they are no longer considered unemployed and are left out of the unemployment calculation. It is PLANTEC's opinion that the quoted three-to-five-percent unemployment rate for the study area underestimates the true unemployment rate of the labor force. We estimate that the "real" unemployment rate is currently in the range of 20-to-30 percent. While the combined total of recognized unemployed civilians and persons not in the labor force is 40 percent, this number was adjusted downward to account for retirees, students and others not considered eligible for work.

Table II-9 presents employment by various industry sectors for each census tract. In the southeast Gainesville area, 52 percent of the labor force is in the services sector, 15 percent in the retail trade, seven percent in construction and two percent in agricultural, forestry, fishing and mining. In comparison to the county employment information, two significant trends are evident. A larger proportion of the employment in the study area is engaged in service jobs as compared to the county. Only 24.29 percent of the total county labor force is engaged in service occupations compared to the 52 percent for the southeast Gainesville area. The only other major difference in

Table II-9. Industry Segment Employment by Census Tract, 1985

Industry	Census Tract 5		Census Tract 6		Census Tract 7		Total All Tracts	
	Number	Percent	Number	Percent	Number	Percent	Number	Percent
Agr./For./Fish./Min.	53	2.11%	30	1.62%	53	1.39%	136	1.67%
Construction	101	4.02%	142	7.68%	294	7.72%	537	6.58%
Manufacturing								
Non-Durable	42	1.67%	12	0.65%	60	1.58%	114	1.40%
Durable	36	1.43%	67	3.63%	150	3.94%	253	3.10%
Transportation	68	2.71%	73	3.95%	137	3.60%	278	3.40%
Communications	42	1.67%	30	1.62%	99	2.60%	171	2.09%
Wholesale Trade	89	3.54%	25	1.35%	124	3.26%	238	2.91%
Retail Trade	398	15.85%	262	14.18%	595	15.63%	1,255	15.37%
Fin./Ins./Real Estate	129	5.14%	10	0.54%	141	3.70%	280	3.43%
Bus./ Repair Services	85	3.39%	24	1.30%	100	2.63%	209	2.56%
Pers./Ent./Rel. Services	106	4.22%	224	12.12%	227	5.96%	557	6.82%
Prof./Related Services								
Health	266	10.59%	347	18.78%	562	14.77%	1,175	14.39%
Education	590	23.50%	416	22.51%	620	16.29%	1,626	19.91%
Other	215	8.56%	49	2.65%	157	4.13%	421	5.16%
Public Administration	291	11.59%	137	7.41%	487	12.80%	915	11.21%
Total	2,511	100.00%	1,848	100.00%	3,806	100.00%	8,165	100.00%

Sources: Donnelly Marketing Information Services.
PLANTEC Corporation, 1986.

comparing southeast Gainesville to the county is in the public administration sector where the study area has 11.21 percent of its work-force versus the county's figure of only 4.79 percent.

The study area's manufacturing sector represents 4.5 percent of total employment compared to the county trend which has 6.6 percent of its employees in manufacturing occupations. The study area's employment base in the wholesale and retail trade sectors also closely assimilates the county trend with 18.28 and 22.03 percent, respectively, in these categories.

The major significance in these employment comparisons is that a large proportion of the labor force residing in the southeast Gainesville area, is engaged in occupations which typically have less than average hourly wage levels. This trend toward lower wage occupations, especially in the services sector, is reflected in the lower family and household income levels within the census tracts and the study area.

MEANS AND TRAVEL TIME TO WORK

PLANTEC reviewed 1980 Census information to identify if there were unique trends in the way people traveled to their place of work. In addition, travel times to work were analyzed to identify trends of residence within the study area traveling a greater than average time to their place of work. As Table II-10 shows, 83 percent of the labor force uses a car or a car pool as a principal means of traveling to their work site, while only seven percent of the labor force uses public transportation. An assessment of travel time found that 35 percent of the labor force travels less than 15 minutes to their work site. Approximately 45 percent travels between 15 to 29 minutes to their work

Table II-10. Means of Transportation to Work by Census Tract, 1980

Category	Census Tract 5 Number	Census Tract 5 Percent	Census Tract 6 Number	Census Tract 6 Percent	Census Tract 7 Number	Census Tract 7 Percent	Total All Tracts Number	Total All Tracts Percent
Drive/Car Pool	1,914	78.47%	1,471	86.23%	3,261	86.20%	6,646	83.83%
Public Transportation	100	4.10%	153	8.97%	278	7.35%	531	6.70%
Other	425	17.43%	82	4.81%	244	6.45%	751	9.47%
Total	2,439	100.00%	1,706	100.00%	3,783	100.00%	7,928	100.00%

Sources: Donnelly Marketing Information Services.
PLANTEC Corporation, 1986.

site. In total, over 80 percent of the labor force has a travel time of less than 30 minutes to their place of employment (Table II-11).

Analyzing the travel-to-work time information, PLANTEC concludes that a majority of the labor force residing within the southeast Gainesville area have jobs within the immediate area or within the urban Gainesville area. Only a small proportion of the labor force travels outside the Gainesville area for employment.

WORKING MOTHERS

PLANTEC further analyzed the labor force to identify the proportion of working mothers. Analysis of the information presented in Table II-12, indicates that 72 percent of the mothers residing within the study area are working at some out-of-home jobs. Twenty-six percent of mothers have children less than six years of age, while 46 percent have school-aged children between the years of six and 17. Only 28 percent of the mothers residing within the study area do not work outside of the home.

The 72 percent of working mothers is somewhat higher than national trends. This indicates that within the area, the types of services necessary and the need for child-care services, in particular, are in high demand.

SUMMARY AND CONCLUSIONS

The following summarizes the key trends occurring in the southeast Gainesville area based on foregoing analysis and data presented by PLANTEC:

- o Population in the southeast Gainesville area is anticipated to decline at an average annual negative rate of 1.88 from a

Table II-11. Travel Time to Work by Census Tract, 1980

Minutes	Census Tract 5		Census Tract 6		Census Tract 7		Total All Tracts	
	Number	Percent	Number	Percent	Number	Percent	Number	Percent
0 - 14	1,373	56.67%	376	21.60%	990	27.29%	2,739	35.15%
15 - 29	824	34.01%	887	50.95%	1,834	50.55%	3,545	45.50%
30 - 59	192	7.92%	400	22.98%	617	17.01%	1,209	15.52%
60 +	34	1.40%	78	4.48%	187	5.15%	299	3.84%
Total	2,423	100.00%	1,741	100.00%	3,628	100.00%	7,792	100.00%

Sources: Donnelly Marketing Information Services.
PLANTEC Corporation, 1986.

Table II-12. Working Mothers by Census Tract, 1980

Category	Census Tract 5		Census Tract 6		Census Tract 7		Total All Tracts	
	Number	Percent	Number	Percent	Number	Percent	Number	Percent
With Children:								
Less Than 6 Years	97	22.88%	185	25.00%	371	26.85%	653	25.65%
6 - 17 Years	174	41.04%	373	50.41%	612	44.28%	1,159	45.52%
Sub Total	271	63.92%	558	75.41%	983	71.13%	1,812	71.17%
Non - Working Mothers	153	36.08%	182	24.59%	399	28.87%	734	28.83%
Total	424	100.00%	740	100.00%	1382	100.00%	2,546	100.00%

Sources: Donnelly Marketing Information Services.
PLANTEC Corporation, 1986.

current estimate of 17,500 people in 1985 to approximately 15,800 people in 1990.

- During the period of 1990 through 1995, the population will stabilize at approximately 15,800 people.
- The population's age distribution within the southeast Gainesville study area is shifting towards the older age categories.
- Younger people, particularly in the age bracket of 14 through 24, are leaving the study area for school, to live in other areas of the city, or to get married and form households in other areas of the city.
- The racial composition in the southeast Gainesville study area has shifted from 53.3-percent white and 46.5-percent black in 1970, to 37.6 and 61.6 percent respectively, in 1985.
- Due to population declines, the total number of households in the study area is also declining.
- While the number of households is declining, the persons per household ratio will remain higher than the state and national trends for the projection period.
- The area's median household income ($15,000 in 1985) was only ten-percent lower than the 1984 county figure of $16,500.
- There is a high "real" unemployment rate not reflected in the published unemployment rate for the study area. PLANTEC projects this rate to be approximately 20-to-30 percent. This is based on a proportion of the labor force classified

as discouraged workers--which is generally not included in the typical unemployment calculation.

- Compared to the county, there is a higher percentage of the labor force in the study area engaged in occupations which are typically compensated with a lower wage scale.
- A majority of the labor force residing in the study area have jobs within Gainesville's metropolitan area.
- There is a high incidence of working mothers residing in the study area.

SECTION III

RETAIL MARKET AND SURVEY ANALYSIS

The following section analyzes the demand for retail goods and personal services and identifies development opportunities within the study area. Data obtained from Donnelly Marketing Information Services and a household and consumer survey conducted jointly by PLANTEC, the North Central Florida Regional Planning Council, and the Community Action Association were used in this analysis. The last portion of this section provides a brief synopsis of employment data generated by the household survey.

TRADE AREA DEFINITIONS

In delineating the trade areas for existing and new retail centers several factors were taken in consideration. The market area for convenience goods is defined as a two-mile radius surrounding a specific store location. Therefore, the convenience goods stores located in close proximity to the study area will compete with stores located within the study area.

Stores selling shoppers' goods typically draw from a much larger market area since they sell higher priced items which are purchased less frequently. Most, if not all, retail stores in Gainesville are within 20-minutes driving time; therefore, any retail stores selling shoppers' goods will compete with new stores located in the study area.

TOTAL PERSONAL INCOME

The first step in measuring the potential for retail development involves determining the total personal income (TPI) in the market area. Table III-1 presents the TPI for the study area for 1980, 1985 and 1990. To determine TPI for 1985 and 1990, the per capita income for 1980 was

Table III-1. Current and Projected Total Personal Income for the Study Area

Tract	1980			1985			1990		
	Population	Per Capita Income	TPI (000's)	Population	Per Capita Income	TPI (000's)	Population	Per Capita Income	TPI (000's)
5	4,688	$6,062	$28,419	4,184	$7,638	$31,957	3,650	$8,433	$30,780
6	4,876	4,562	22,244	4,373	5,748	25,136	3,800	6,346	24,115
7	9,252	4,685	43,346	8,880	5,903	52,419	8,400	6,517	54,743
Total	18,816		94,009	17,437		109,512	15,850		109,638

Notes: (1) 1985 Figures Reflect Adjustments by the CPI from 1980 to 1985.
(2) 1990 Figures Reflect an Adjustment at a 2% Annual Compound Growth Rate.

Sources: U.S. Department of Commerce, Bureau of the Census, Census of Population, 1980.
Donnelly Marketing Information Services, 1986.
PLANTEC Corporation, 1986.

indexed to 1985 dollars through the use of the consumer price index. The 1985 dollars were then kept constant for the 1990 projections except for a two percent real annual growth trend. Both the 1985 and 1990 per capita income amounts are then multiplied by the projected population to determine total TPI for the specific year. Although the study area population is not growing, PLANTEC estimates that the TPI will increase approximately $126,000 by 1990 based on an assumed two percent annual growth in real income.

TOTAL SALES POTENTIAL AND SUPPORTABLE SPACE

Based on the study area's TPI of $109.5 million in 1985 and the percentage expenditure patterns reported for the southeast Gainesville area by Donnelly Marketing Information Services, the study area spent approximately 22 percent of TPI, or $24.3 million, on selected convenience goods and 7.3 percent or $8.0 million on selected shoppers' goods (Table III-2). Applying these percentages to the projected 1990 TPI, the study area will generate a total sales potential of $24.3 million and $8 million in selected convenience goods and shoppers' goods respectively (Table III-3).

Based on the total sales potential for convenience and shoppers' goods, the study area could support 137,500 square feet (SF) in 1985 and 137,600 SF in 1990 for selected convenience goods. In 1985, the TPI can support 99,500 SF and 99,600 SF in 1990 of selected shoppers' goods (See Table III-3 for calculations). However, this does not mean there should be a total of 237,200 square feet of retail space located in the study area by 1990. First, all existing store square footages must be subtracted from this total demand and planned competitive projects must also be deducted. Also, due to competitive stores located outside the

Table III-2. Estimated Expenditure Patterns for Selected Retail Stores in the Study Area

Categories	Study Area 1985
Total Personal Income ($000's)	$109,512
Selected Convenience Goods	
Grocery Stores	15.2%
Full Service & Fast Food Restaurant	4.7%
Drug and Proprietary Stores	2.3%
Total Convenience Goods	22.2%
Selected Shopper's Goods	
Apparel	3.8%
Shoe Stores	0.8%
Furniture Stores	1.6%
Appliances	0.5%
Hardware	0.6%
Total Shopper's Goods	7.3%
Total	29.5%

Notes: (1) Shoe store sales are accounted for in the apparel category.
(2) Appliance store sales are accounted for in the furniture category.
(3) Includes all eating and drinking places.

Sources: Donnelly Marketing Information Services, 1986.
PLANTEC Corporation, 1986.

Table III-3. Total Sales Potential and Supportable Space for Selected Retail Stores in the Study Area, 1985 and 1990

Category	Average Sales Per SQ.FT.	1985 Sales (000's)	1985 Supportable SQ.FT.	1990 Sales (000's)	1990 Supportable SQ.FT.
Selected Convenience Goods					
Grocery Stores	$265	$16,672	62,910	$16,690	62,980
Full Service & Fast Food Restaurant	$95	$5,105	53,740	$5,110	53,790
Drug and Proprietary Stores	$122	$2,540	20,820	$2,543	20,840
Convenience Goods		$24,317	137,470	$24,343	137,610
Selected Shopper's Goods					
Apparel	$90	$4,121	45,790	$4,125	45,830
Shoe Stores	$74	$910	12,300	$911	12,310
Furniture Stores	$75	$1,803	24,040	$1,805	24,070
Appliances	$82	$551	6,720	$552	6,730
Hardware	$61	$647	10,610	$648	10,620
Shopper's Goods		$8,032	99,460	$8,041	99,560
Total for Selected Convenience and Shopper's Goods		$32,349	236,930	$32,384	237,170

Note: Supportable SQ.FT. figures are estimated using average sales per sq.ft. industry standards.

Sources: Dollar and Cents of Shopping Centers, 1984.
Donnelly Marketing Information, 1986.
PLANTEC Corporation, 1986.

study area, stores within the study area will only capture a portion of the remaining total sales potential. Therefore, appropriate capture rates for new facilities must be determined and used to calculate the final demand for new square footage supportable within the market.

To determine the development potential for selected retail stores, PLANTEC compared the total square footage of space supportable by the study area TPI to the square footage of retail stores currently serving the study area. Additionally, information regarding consumer purchasing characteristics to determine net demand within the study area and development opportunities for new commercial facilities (Table III-3A) were also identified.

Household and consumer surveys were designed by PLANTEC and undertaken by the Community Action Association in concert with the North Central Florida Regional Planning Council. These surveys were designed to be statistically significant at the 95 percent confidence level (four percent margin of error) for the household version with the consumer survey at the 90 percent level of confidence (five percent margin of error). Therefore, in order to meet these requirements, each question on the household survey needed a minimum of 384 valid responses, whereas the consumer survey questions required at least 272 valid responses. While the total number of surveys administered for each respective area was well above the minimum requirements for statistical significance, not all the questions on each survey form were completed. However, those questions falling short of the required valid responses still provided an indication of trends within the study area. A summary of the findings of the survey is incorporated herein and a complete sample of the questionnaire is included in Appendix B.

Table III-3A. Reconciliation of Retail Demand and Supply Characteristics For the Study Area

Category	1985 Square Feet	1990 Square Feet
SELECTED CONVENIENCE GOODS		
Grocery Stores		
Demand	62,900	63,000
Supply	59,000	59,000
Leakage (1)	3,900	3,900
Net Demand (Oversupply)	-0-	-0 -
Restaurants		
Demand	53,700	53,800
Supply	22,000	22,000
Leakage (2)	22,000	22,000
Net Demand (Oversupply)	9,700	9,800
Drugs		
Demand	20,800	20,800
Supply	12,000	12,000
Leakage (3)	6,000	6,000
Net Demand (Oversupply)	2,800	2,800
SELECTED SHOPPERS' GOODS		
Apparel and Shoes		
Demand	58,100	58,100
Supply	26,800	26,800
Leakage (4)	26,800	26,800
Net Demand (Oversupply)	4,500	4,500
Furniture		
Demand	24,000	24,000
Supply	12,500	12,500
Leakage (5)	12,500	12,500
Net Demand (Oversupply)	(1,000)	(1,000)
Appliances		
Demand	6,700	6,700
Supply	2,500	2,500
Leakage (6)	4,200	4,200
Net Demand (Oversupply)	-0-	-0-

Table III-3A. Reconciliation of Retail Demand and Supply Characteristics for the Study Area (Continued)

Category	1985 Square Feet	1990 Square Feet
Hardware		
Demand	10,600	10,600
Supply	-0-	-0-
Leakage (7)	7,000	7,000
Net Demand (Oversupply)	3,600	3,600
TOTAL RETAIL GOODS		
Demand	236,800	237,000
Supply	134,800	134,800
Leakage	82,400	82,400
Net Demand (Oversupply)	19,600	19,600

Notes:

(1) Estimate based on 64 percent of the study area residents frequenting grocery stores outside the study area.

(2) Estimate based on 27 percent of survey respondents indicating they frequent restaurants outside the study area more than those within.

(3) Estimate based on 93 percent of the study area residents frequenting drug stores outside the study area.

(4) Estimate based on 50 to 60 percent of the survey respondents indicating they do not shop in the study area.

(5) Estimate based on study results indicating infrequent purchase habits and strong price comparison buyer preferences.

(6) Estimate based on buyer trends and local of survey respondents desiring locations of new stores.

(7) Estimate based on buyer trends of 30 percent of the respondents shopping along North Main Street and North of the study areas, leaving 70 percent of sales made greater distances from the study area.

(8) Totals do not equal supply figures in Table III-3 due to rounding.

Source: PLANTEC Corporation, 1986.

It is also important to point out that in order to assure a random sample of the entire study area, PLANTEC identified 13 separate neighborhoods or districts and the number of households in each district to be surveyed (Figure 2). However, for analysis purposes, some of the districts were combined because of physical and other socioeconomic characteristics which resulted in the following eight districts: 1 and 2 (combined); 3, 4 and 6 (combined); 5; 7; 9 and 10 (combined); 8 and 11 (combined); 12; and 13. The household survey results are presented by the identified eight districts in the Appendix B tables.

Although an attempt was made to administer the consumer survey at five different locations, permission was given only for the following stores: K-Mart and the Gainesville Shopping Center (both on North Main Street), Thriftway, and Robinson's IGA market.

CONVENIENCE GOODS

Grocery Stores

In 1985, the study area's population spent approximately $16.7 million on groceries or 15.2 percent of the total TPI. The 1990 projection of $109.6 million for total personal income will support 62,900 square feet of grocery retail space.

Table III-4 provides a list of grocery stores influencing the study area. PLANTEC estimates there is approximately 59,000 square feet of grocery store space currently within the study area. The square feet of existing grocery stores captures 94 percent of the total supportable retail space. In addition, there are three grocery stores located adjacent to the study area which also siphon off a sizable portion of the TPI from the study area. Figure 3 illustrates the location of the

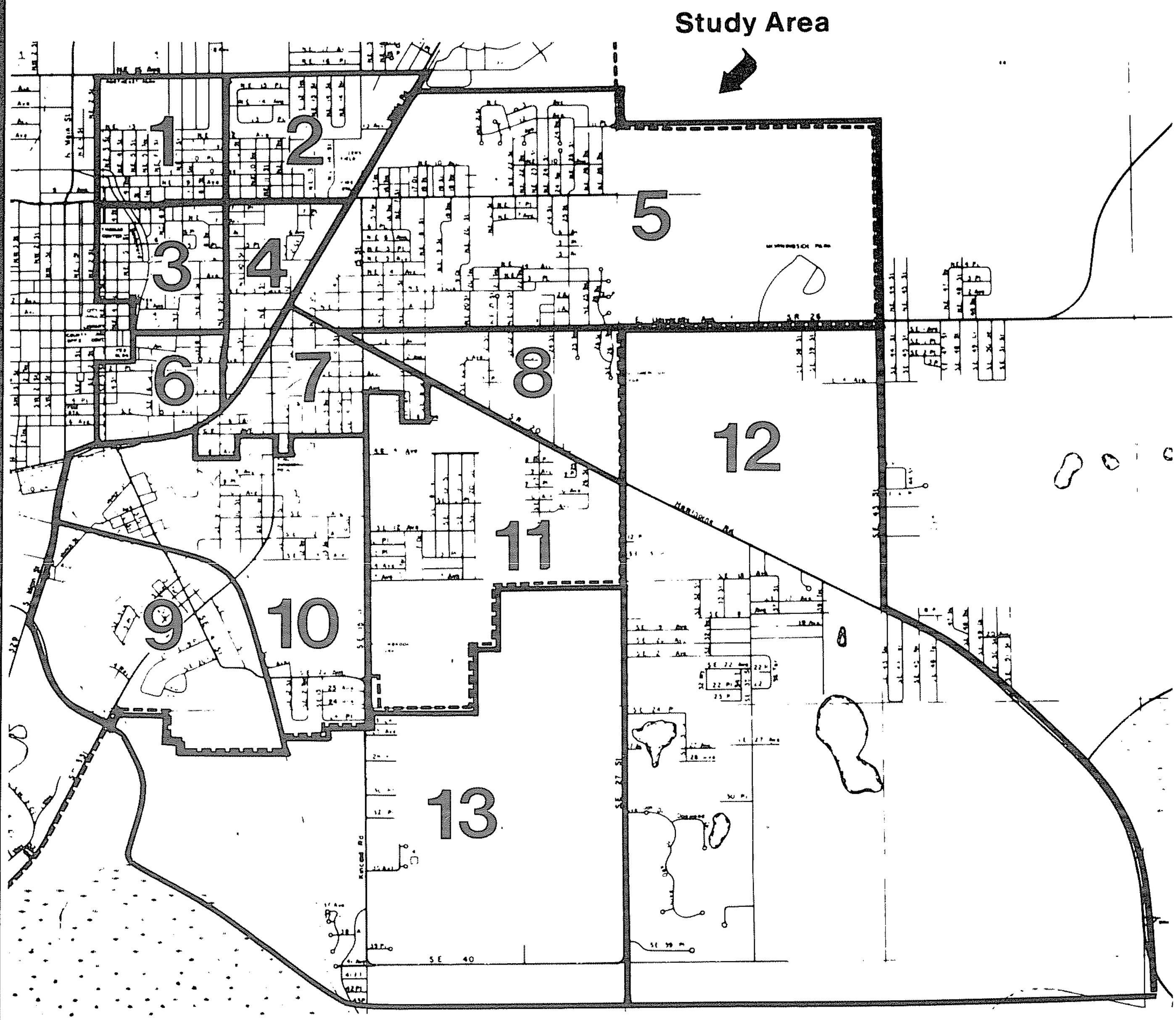

Figure 2

Survey District Boundary Map

SOURCE: PLANTEC, 1986.

Table III-4. Grocery Stores Serving the Study Area

Map Key	Stores	Address
61	Winn Dixie *	2627 Hawthorne Rd.
62	Winn Dixie	S. Main St.
63	Thriftway *	Waldo Rd.
64	Publix	1014 N. Main St.
65	Robinson's Market *	1220 8th Ave.

Note: * Stores located within the study area.

Source: PLANTEC Corporation, 1986.

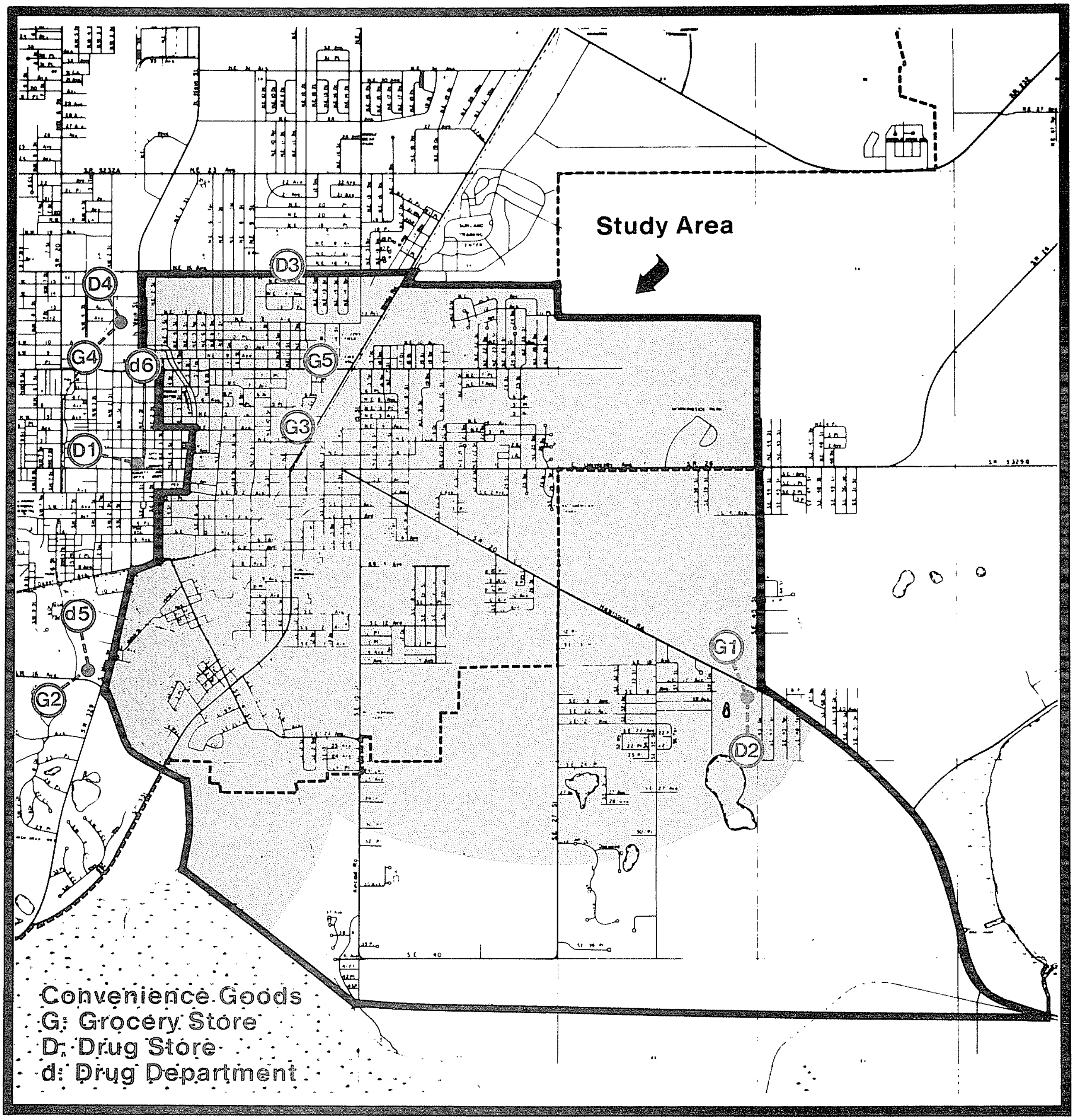

Figure 3

Location Map and Trade Area Boundaries for Convenience Goods

SOURCE: PLANTEC, 1986.

grocery stores with their respective trade area delineated by a two mile radius.

Responses to the household survey indicate that price and distance from home are the primary criteria used in deciding where to shop for groceries. (Table B-1). While the shopping center survey shows that only 35 percent traveled at least ten minutes by car, further analysis of household survey data reinforces the conclusion that people are primarily shopping for groceries at stores located closer to their homes (Tables B-2 and B-3). Those surveyed in Districts 8 and 11; 12; and 13 all shop primarily shop within the study area. In Districts 1 and 2; 3, 4 and 6; and 5 residents shop primarily along North Main Street. Residents in District 7, which is centrally located, primarily shop along South Main Street and in the study area. Of the total number of respondents in the study area, only 35.9 percent of the population indicated they shopped within the study area (Table III-5). Therefore, approximately 65 percent of the groceries expenditures is escaping outside of the study area.

Although there appears to be a near balance of supply and demand for grocery store space influencing the study area, individuals surveyed expressed a strong desire for additional grocery stores to be located within the study are a (Table B-4). As the table indicates, of the 156 requests for grocery stores, 50 responses came from District 5 and 35 responses from District 8 and 11.

It is PLANTEC's conclusion that with the number of grocery stores located in or near the study area, there is limited market potential at this time for additional grocery square footage. This conclusion is based on the current market conditions, population and personal income

Table III-5. Study Area's Shopping Patterns for Selected Consumer Goods

Categories	Groceries	Drugs	Clothing	Hardware	Appliances	Furniture
Districts						
Study Area	35.9%	6.9%	1.1%	0.0%	5.9%	2.3%
North of Study Area	0.4	14.7	0.0	20.5	5.9	1.8
Downtown	0.7	15.5	3.1	15.4	3.6	9.5
N. Main	43.3	29.8	30.1	29.7	52.9	29.0
S. Main	5.8	18.8	4.7	18.7	3.2	0.9
N.W. 13th/HGWY 441	4.9	8.6	11.7	8.9	11.3	14.9
Oaks Mall	8.5	4.9	49.3	4.9	14.0	3.6
Other	0.4	0.8	0.0	0.8	3.2	2.7
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Note: Totals may not sum to 100 percent due to rounding.

Sources: Household Survey of the Gainesville Study Area, 1986.
PLANTEC Corporation, 1986.

characteristics. However, if the area's population increases in the future--particularly in Districts, 5; 8 and 11; and 12 there may be sufficient market potential to warrant further consideration of grocery stores in these particular district locations.

Full-Service and Fast-Food Restaurants

In 1985, the study area population spent approximately $5.1 million or 4.7 percent of its personal income in restaurants. The projected TPI in 1995 is expected to support approximately 53,700 square feet of restaurant space, or the same demand as illustrated in 1980.

Table III-6 provides a listing of existing restaurants located within the study area. PLANTEC estimates there is approximately 22,000 square feet of restaurant space in the study area. From the TPI calculations, approximately 53,700 square feet of restaurant space is supportable. While supply does not capture total demand, there are numerous restaurants located throughout Gainesville which tend to attract TPI from the study area. In the household survey, individuals indicated they more frequently eat in restaurants located in the northwest and southwest Gainesville area rather than in the study area (Table III-7). The leakage of TPI is further enhanced by the amount of retail construction in the western portion of the city which includes most of the newer restaurants built in the Gainesville area. In addition, the survey does not reveal a significant desire for new restaurants within the study area with only 61 people, or 29 percent, expressing a desire for new restaurants (Table B-4).

PLANTEC that concluded while some potential for additional restaurants is illustrated from the mathematical model, the number of

Table III-6. Restaurants Located Within the Study Area

Name	Address
B & J's Restaurant and Lounge	5400 SE Hawthorne Rd.
Burger House	104 NE Waldo Rd.
China House	1512 NE 8th Ave.
Ed's Bar-B-Q	1021 SE 4th Ave.
In-N-Out Hamburgers	1445 SE Hawthorne Rd.
Iron Horse Restaurant	E.University Blvd. and Waldo Rd.
Kentucky Fried Chicken	1231 E. University Blvd.
Las Villas Catering Service	1040 E. University Blvd.
Mac's Drive Inn	1331 E. University Blvd.
Manaro's Restaurant	2120 Hawthorne Rd.
Omaha's Cattle Co Inc.	NE 17th Terrace
Sandwich Inn	110 NE 16th Ave.

Source: PLANTEC Corporation, 1986.

Table III-7. Where and How Often Individuals Eat Out

Location	NE	SE	NW	SW	Total	Weekly	Monthly	Yearly
Fast Food	55	30	102	34	221	103	89	15
Full Service	32	6	111	71	220	81	114	20
Total	87	36	213	105	441	184	203	35

Sources: Household Survey of the Gainesville Study Area, 1986.
PLANTEC Corporation, 1986.

new restaurants which can be supported is restricted by the following factors:

- o Any new restaurants will have difficulty competing with those located in the downtown as well as the western sections of Gainesville, where a majority of those people surveyed indicated a preference to go for eating purposes.
- o Most of the new retail facilities are being built in these same areas drawing people out of the study area for shopping and eating purposes. Therefore, PLANTEC concludes that the study area can only support only one or two new restaurants primarily serving the resident population of the study area.

Drug Stores

In 1985, the study area population spent approximately $2.5 million on pharmaceutical items or 2.3 percent of its total personal income. The projected 1990 TPI indicates that approximately 20,800 square feet of retail space can be supported in the study area.

There are two drug stores located within the area totaling approximately 12,000 square feet (only 50 percent of Gresham's Drugs square footage is included due to its location on the perimeter of the study area). Table III-8 lists the stores servicing the study area and Figure 3 depicts their locations.

Analysis of the household survey indicates that price and distance from home are the primary criteria used in choosing where to shop for drugs (Table B-1). Further analysis reveals that price of product outweighs the location of the store. Individuals surveyed indicate they do not primarily shop at stores located near their homes (Table B-3). Only in District 1 and 2 with 26 percent, and District 7 with 18 percent

Table III-8. Drug Stores/Departments Serving the Study Area

Map Key	Stores	Address
D1	City Drugs	16 E University Ave.
D2	Revco Discount Drugs *	2627 Hawthorne Rd.
D3	Gresham's Drugs *	1138 NE 16th Ave
D4	Eckerds	1112 N. Main St.
d5	Pic-N-Save	300 SW 16th St.
d6	Pic-N-Save	901 N. Main St.

Note: * Stores located within the study area.

Source: PLANTEC Corporation, 1986.

was there any indication that residents shop at drug stores located within the study area. Even in these Districts, over 50 percent of those surveyed stated they shop in stores located along North Main Street or in other downtown locations. In the total study area, only 6.9 percent of the population shops for drugs in the study area, while almost 30 percent of the residents shop along North Main Street (Table III-5). Of those surveyed, only 49, or 12 percent, of the respondents expressed a demand for additional drug stores within the study area (Table B-4).

PLANTEC concluded a potential does exist for locating a drug store within the study area. Due to the sensitivity of price expressed by survey respondents, a discount drug store is believed to have the greatest probability of success. It is also likely that a discount store would capture a portion of the consumer purchasers currently being made outside of the study area.

SHOPPERS' GOODS

Clothing Stores

In 1985, the study area population spent approximately $4.1 million on clothing or 3.8 percent of its total personal income. Projections for 1995 TPI indicate that a total of 58,100 square feet of retail space (apparel and shoes) can be supported in the market.

There are no clothing stores located in the study area. However, as Figure 4 shows, there are seven clothing stores, or stores with clothing departments, located in close proximity to the study area (Table III-9). Of these stores, four are located along Main Street including three discount department stores. PLANTEC estimates that 26,800 square feet of retail space is allocated for clothing in these

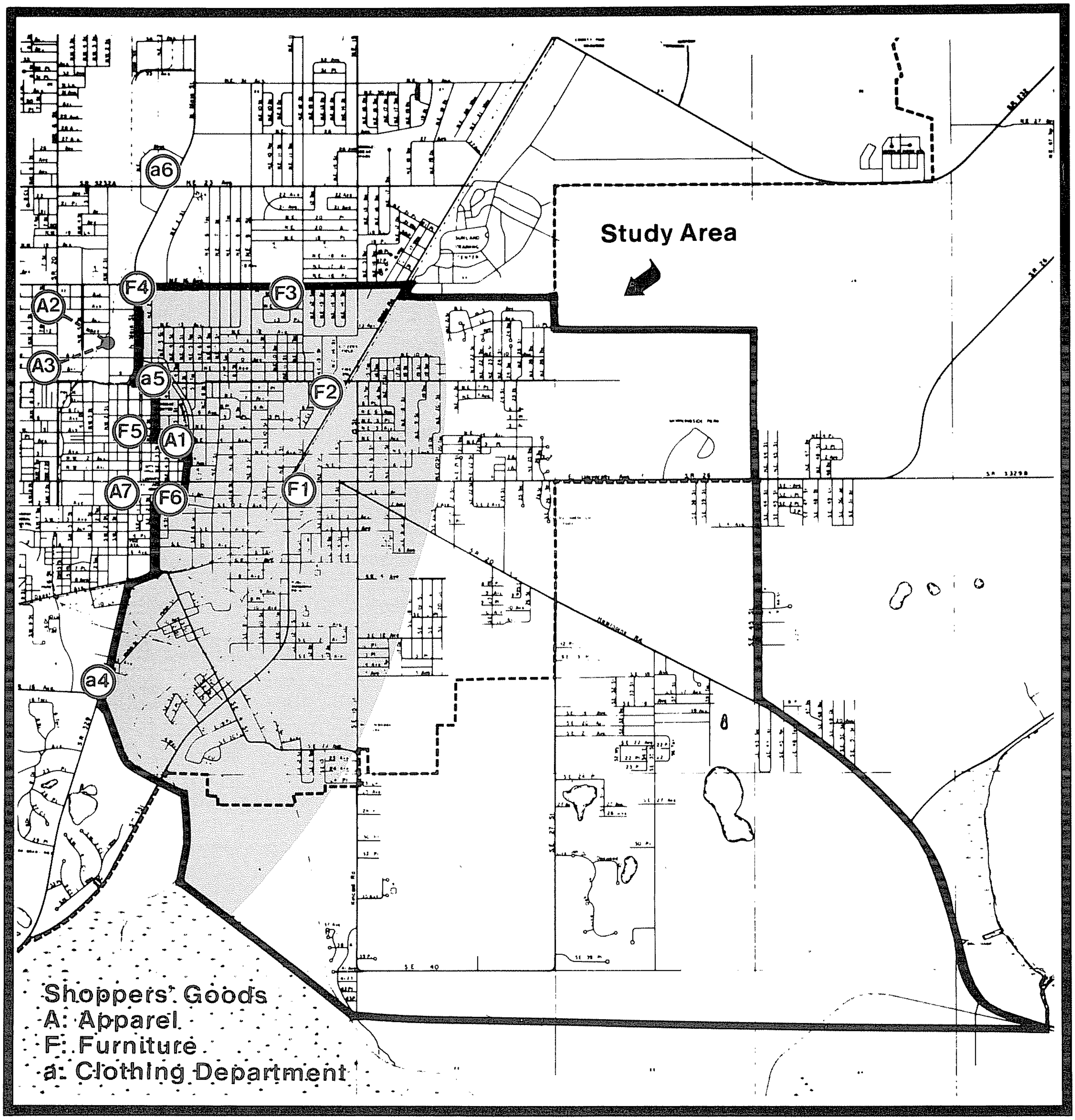

Figure 4

Location Map and Trade Area Boundaries for Shoppers' Goods

SOURCE: PLANTEC, 1986.

Table III-9. Clothing Stores Located Adjacent to the Study Area

Map Key	Stores	Address
A1	Smith's Men Shop	4 E. University Ave.
A2	Belk Lindsey	N. Main St.
A3	Oriental Innovations	1208 N. Main St.
a4	Pic-N-Save	300 SW 16th St.
a5	Pic-N-Save	901 N. Main St.
a6	K-Mart	N. Main St & 23rd Ave.
A7	Boutique Bellissima	2 SW 1st Ave.

Source: PLANTEC Corporation, 1986.

stores. In addition, as consumers will generally travel greater distances for clothing, there is a large leakage of TPI to clothing stores and other department stores with clothing sales throughout Gainesville.

Both price and quality were the primary criteria used in selecting clothing stores (Table B-1). The consumers' willingness to travel greater distances for clothes is also reinforced by responses in the household survey. As Table B-3 shows, the respondents in every district indicated they primarily shopped for clothes at the Oaks Mall, (49.3 percent) and along North Main Street (30 percent).

While the survey shows the willingness to travel outside the study area to purchase clothes, respondents also expressed a desire for new clothing stores within the study area. As the survey results indicate, the second greatest need expressed by respondents was for clothing stores (Table B-4).

PLANTEC has concluded that potential exists for the location of clothing stores, or new clothing departments within existing stores, to service the study area. However, the following two trends mitigate this potential opportunity:

- o It is unlikely a new clothing store located in the study area will draw consumers from outside of the study area due to the proximity of competitor locations and the strategic location of retail malls throughout the area.
- o As shown in the survey data, residents in the study are are price sensitive and will travel further when shopping for clothes. Stores located along North Main Street, and

especially in the regional mall locations, will be major competitors of any store opening within the study area.

Shoe Stores

In 1985, the study area population in 1985 spent approximately $910,000 on shoes or 0.8 percent of TPI. Projections for 1990 indicate that TPI will support approximately 12,300 square feet of retail space.

There are no shoe stores within the study area but there are three discount stores with shoe departments along the Main Street corridor (Table III-10). From a consumer's prospective, shopping for shoes involves similar purchasing considerations as the purchase of clothing. Like clothing stores, there are numerous shoe stores located throughout Gainesville and several in the Oaks Mall which will compete directly with a store located in the study area.

The survey revealed a slight need for the location of new shoe stores within the study area (Table B-4). PLANTEC concluded while there are no shoe stores located within the study area, present consumer needs appear to be met by the stores located outside of the study area. Since all shoe purchases are made outside the study area, a new shoe store or an existing store opening a shoe department might be able to capture a portion of the sales now being made outside the study area.

Furniture Stores

In 1985, the study area population spent approximately $1.8 million on furniture or 1.6 percent of the total personal income. Based on the 1990 projections for TPI, it is estimated that the study area can support approximately 24,000 square feet of retail space for the sale of furniture.

Table III-10. Discount Department Stores with Shoe Departments Serving the Study Area

Stores	Address
Pic-N-Save	300 16th St.
Pic-N-Save	901 N. Main St.
K-Mart	N. Main & 23rd Ave.

Source: PLANTEC Corporation, 1986.

There is approximately 12,500 square feet of study area furniture sales space within the study area (Table III-11), and over 40 furniture stores located throughout Gainesville which compete for furniture expenditures.

Further analysis of the potential for furniture sales space in the study area is unnecessary for several reasons. Furniture sales is a very price sensitive commodity and consumers typically spend a considerable amount of time comparative shopping. Stores usually draw from a very large market area typically greater than the study area. Despite the fact that the number of responses concerning furniture sales was too small to draw any statistically significant conclusions, the survey indicated no special need for a furniture store in the study area. Since furniture is a high-priced item which is infrequently purchased, residents of the study area are willing to travel further when shopping to get the lowest price available. PLANTEC therefore concludes the opportunity for the location of a furniture store within the study area is minimal.

Appliance Stores

In 1985, the study area population spent approximately $551,000 or 0.5 percent of the total TPI on appliances. Based on projections for 1990, the study area should be able to support 6,700 square feet of retail space for the sale of these goods. As Figure 5 indicates, there is only one appliance store located within the study area with approximately 2,500 square feet of sales space. There are five additional stores located in close proximity to the study area (Table III-12).

Table III-11. Furniture Stores Located Within and Adjacent to the Study Area

Map Key	Stores	Address
F1	Affordable Furniture and Bedding *	1208 E University Ave.
F2	Alachua County and Dumas Discount Furniture and Bedding *	1421 NE 8th Ave.
F3	The Furniture World *	1132 NE 16th Ave.
F4	Catalogue Furniture Sales	1601 N. Main St.
F5	Coken's New & Used Furniture	534 N. Main St.
F6	Cox Furniture Company	19 SE 1st Ave.

Note: * Stores located within the study area.

Source: PLANTEC Corporation, 1986.

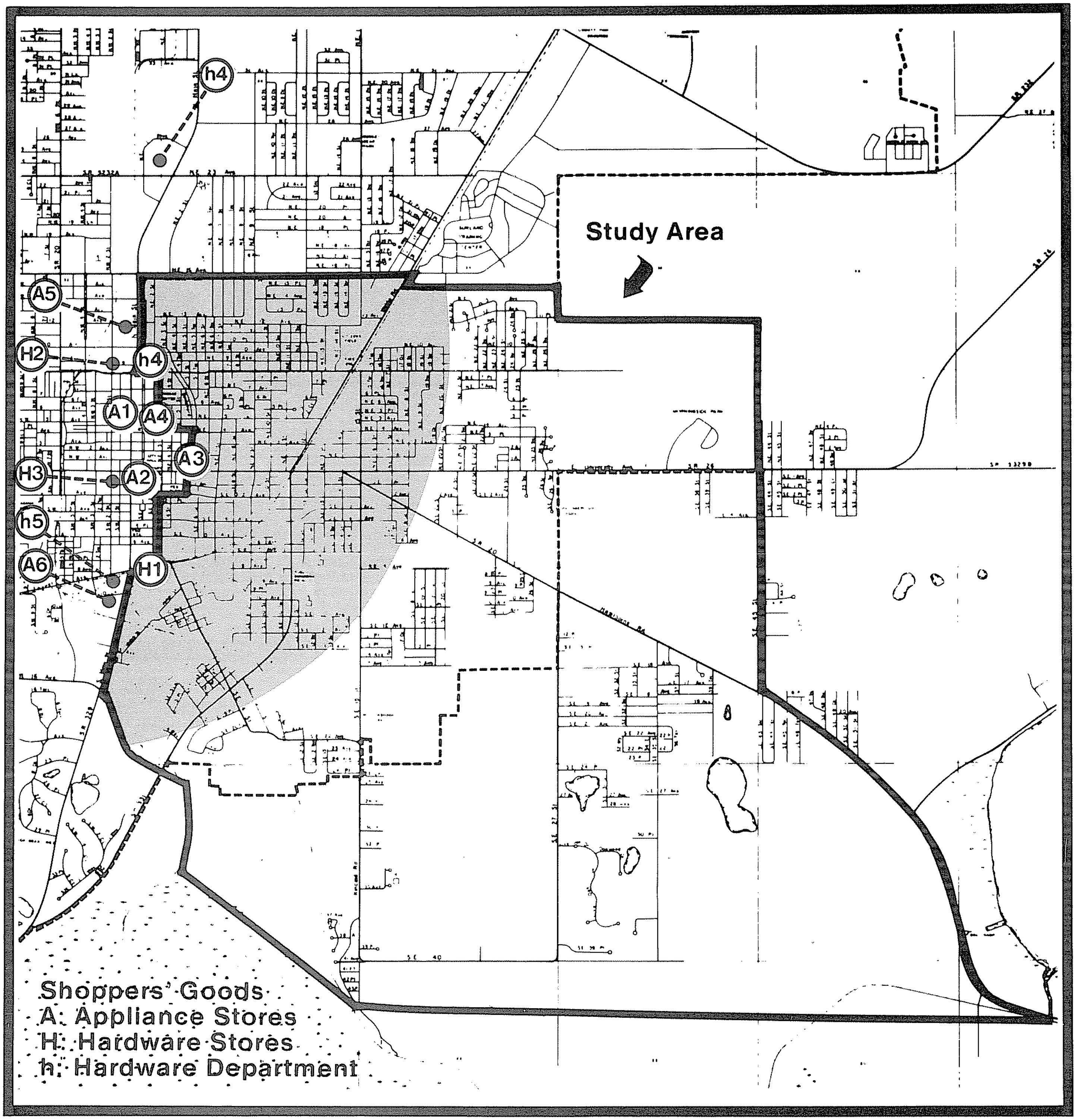

Figure 5

Location Map and Trade Area Boundaries for Shoppers' Goods

SOURCE: PLANTEC, 1986.

Table III-12. Appliance Stores Located Within or in Close Proximity to the Study Area

Map Key	Stores	Address
A1	Akira Wood and Building Works	619 S. Main St.
A2	Badcock Home Furnishing Center	111 SW 2nd Ave.
A3	Chambiees *	500 E. University Blvd.
A4	Martin Appliance	526 N. Main St.
A5	McDuff Appliance	1121 N. Main St.
A6	Barber's Appliance Service	1020 S. Main St.

Note: * Store located within the study area.

Source: PLANTEC Corporation, 1986.

The household survey failed to generate sufficient responses to provide a clear understanding of the primary criteria used by residents of the study area in choosing where to shop for appliances. It was clear from those who did respond, that they shopped for appliances in stores located along North Main Street (Table B-3).

While the survey results were inconclusive regarding market supportable space for appliance sales, the indication is that minimum potential exists for additional appliance sales space based upon shoppers' buying attitude and the number of stores located in and adjacent to the study area.

Hardware Stores

In 1985, the study area population spent approximately $650,000 or 0.6 percent of the total TPI on hardware items. Projected TPI in 1990 indicates support for 10,600 square feet of retail space for hardware sales.

There are no hardware stores located in the study area; however, there are five hardware stores or stores with hardware departments located in close proximity to the study area (Table III-13). Consumer responses to the survey indicate that price was the primary criteria used in choosing where to shop for hardware items (Table B-1). In six of the eight Districts residents shop for hardware items downtown or at stores located north of the study area (Table B-3). Residents in District 9 and 10 shopped more often at stores located along South Main Street. In the total study area, 29.7 percent of the respondents stated that they shopped along North Main Street and 20.5 percent indicated they shop north of the study area for hardware items (Table III-5).

Table III-13. Hardware Stores Serving the Study Area

Map Key	Stores	Address
H1	Stringfellow Supply Co.	1015 S. Main St.
H2	Ace Hardware	300 NW 8th Ave.
H3	Rice Hardware	15 SW 1st Ave.
h4	K-Mart	N. Main St. & 23rd Ave.
h5	Clayton Co.	902 S. Main St.

Source: PLANTEC Corporation, 1986.

PLANTEC concludes that some potential does exist for additional hardware store sales space. It is recommended that a site near the center of the area be considered because there are several hardware stores located along the perimeter of the study area which have market areas servicing the study area.

PERSONAL SERVICES

During this survey process, when asked where individuals went for various personal services, the respondents usually stated a geographic area rather than a specific address. Therefore the survey provides a means to determine how many people use services located in the northeast, southeast, northwest, and southwest quadrants of Gainesville rather than on a smaller geographical basis. For this portion of the survey, the number of responses are to few to assure a statistically significant conclusion. However, the results do provide an indication of the trends where residents seek various personal services. Tables III-4, B-4 and B-5 provide a breakdown of where individuals in the districts go for various personal services.

Beauty/Barber Services

Only residents of Districts 8 and 11; 12; and 5 showed strong preference for hair stylists to be located within the northeast or southeast quadrant. In District 7, 37.5 percent of the respondents stated they went to hair stylists located in these areas. Of the total number of persons surveyed, almost 60 percent go to hair stylists located in the northwest or southwest quadrants. Approximately 34 percent of those surveyed frequented hair stylists located in the northeast or southeast quadrants (Table III-14).

Table III-14. Where Individuals Surveyed Go for Specific Services

Regions	Beauty/Barber	Laudry	Medical	Auto Repair	Banking
Northwest	45.4%	35.0%	22.2%	52.1%	34.5%
Southwest	14.0	16.2	61.9	5.6	5.8
Northeast	25.1	32.5	5.9	21.5	3.1
Southeast	8.7	15.2	5.4	13.9	4.4
Downtown	6.8	1.0	4.6	6.9	52.2
Total	100.0%	100.0%	100.0%	100.0%	100.0%

Note: Totals may not sum to 100 percent due to rounding.

Sources: Household Survey of the Gainesville Study Area, 1986.
PLANTEC Corporation, 1986.

While the survey does not indicate a significant need for additional beauty/barber shops, the strong preference for services outside of the study area indicates that a new business may be able to capture some of this market. Currently there are approximately eight beauty salons/barber shops located in the study area. It is PLANTEC's opinion that a beauty/barber shop may be successfully located in the study area to service neighborhood residents; with a location being sensitive to competitor locations and density of population.

Laundry Services

Results of the survey indicate that laundromats are the most frequently used personal service by residents of the study area. In half of the districts surveyed, between 30 to 45 percent of the respondents indicated they used laundromats located in the East quadrants. Of the remaining districts, over 45 percent of the respondents frequented laundromats in the east quadrants. It can be concluded from these responses that location is not important in choosing where to go for laundry services. A need for additional laundromats was identified based on 52 of the 207 respondents expressing a desire for additional laundromats within the study area.

It is the consultant's opinion that a potential exists for the development of additional laundromats in the study area. The southeast portion of the study area appears to have the greatest potential as there are six laundromats currently located within the study area and only one in the southeastern portion.

Medical Services

In the study area, residents in Districts 8 and 11; and 12, which are two of the three most eastern districts, used medical services located in the east quadrant. Over 60 percent of the individuals surveyed responded that they used medical services located in the southwest quadrant.

While a majority of the people are using medical services located in southwest Gainesville, request for additional medical services in the area was evident with 45 out of 207 survey respondents expressing a need. It will be difficult to find a doctor to locate a practice in the study area. Most of the medical activity and population growth necessary to support a medical practice is occurring in the western sectors of Gainesville. Secondly, PLANTEC estimates that over 90 percent of the physicians are located in the west quadrants where there is an evident growth trend. Population in the study area is stabilizing and has a lower average household income than other areas of Gainesville which makes starting a medical practice difficult. PLANTEC suggests the possibility of encouraging a hospital to locate a clinic in the study area as an alternative.

Auto Repair Services

A large number of auto repair services are located along South Main Street and at the northern end of North Main Street. In Districts 1 and 2; 3, 4 and 6; 7; 12; and 5; between 28 to 35 percent of those surveyed stated that they use repair services located in the eastern quadrants. Also in District 9 and 10, and in District 8 and 11 over 50 percent of the respondents indicated that they used repair services located in the eastern quadrants. Approximately 35 percent of all respondents use auto repair services located in the eastern quadrants while approximately 52 percent use services located in the northwest quadrant.

PLANTEC could not identify market potential for additional repair facilities. There appears to be a sufficient number of auto repair services available to meet the market demand of the study area. In addition, respondents to the survey did not express a need for additional auto repair facilities.

Banking Services

In all of the districts less than ten percent of the respondents stated that they banked in the eastern quadrants. According to the survey, residents generally use banks or savings and loan associations which are located near their place of work or on their work travel route. Survey responses indicate that over 50 percent of the residents bank downtown, with 34 percent banking in the northwest quadrant. PLANTEC concludes the current market demand is being met by banking services in the study areas or those conveniently located to residents' work routes. It should be pointed out that there is one full-service banking operation at the Eastgate Shopping Center which primarily serves residents of the study area.

CONCLUSIONS

PLANTEC estimates that the study area currently has approximately 134,800 square feet of retail space. This space is comprised of the categories analyzed in this report which are considered to be the major categories of consumer purchases. We estimate that 82,400 square feet of sales space outside the study area services consumers residing in the study area. In total, we project current supply of retail goods at 217,200 square feet with the total net demand being approximately 20,000 square feet.

Based on the 1990 projection of demand which is approximately 237,200 square feet of total retail space, plus competitive locations of other retail stores at the perimeter of the study area, a market potential for a community or neighborhood shopping center does not exist. However, we do feel there is potential for one or two small commercial centers in the 5,000-to-10,000-square-foot range which can house stores in the 1,000-to-3,000-square-foot range for small retail and personal service establishments which can be justified within the current and future market demand.

In analyzing the retail market, some potential for retail stores and personal services was determined as being needed in the study area. There appears to be a demand or a need for: additional restaurants for servicing local neighborhood residents, a discount drug store, a hardware store, and possibly a small clothing/shoe store. Survey responses also indicated a desire for medical services, laundromats, and beauty parlors.

PLANTEC recommends that one or possibly two small commercial centers totaling about 20,000 square feet be considered for location in the study area. The type of development concept envisioned for these retail centers would be commercial and personal service store-front space clustered into a single shopping center structure or strip development.

SURVEY EMPLOYMENT RESULTS

The household survey was used to determine the percentage of persons employed, type of employment, and where persons in the study area were employed. Because this section of the survey received over

384 valid responses, the sample is statistically significant and the results are applicable to the study area as a whole.

As Table III-15 shows, 422, or 61 percent, or survey respondents stated that they are presently employed and 170, or 25 percent, indicated they are unemployed. It is interesting to note that both employment and unemployment survey results closely parallel the information provided in Section II, assuming that the vast majority of the unemployed persons are actually not in the labor force or actively seeking work. The number of retired persons, which equates to 11 percent of those surveyed, or 11 percent of the total population, corresponds to the proportion of the study area's population which is over 65 years of age. A small portion, or some 2.5 percent of those surveyed, indicated they were working college students.

General occupational categories were identified to classify individuals employed in the study area. A breakdown of the occupational classifications are presented in Table III-16. As shown, the majority, or over 55 percent, of employed persons indicated employment in the service sector. The next highest classification was that of professional with 81 persons, or 20 percent, of the surveyed respondents. The government sector was next with almost 12 percent, followed closely by the construction sector with almost ten percent of total employed persons. Once again, it is interesting to note that the service and construction sectors, in particular, closely assimilate the information presented in Section II of the employment analysis for the study area.

The final employment concern addressed in the household survey dealt with the location of the work place. The locational analysis, as

Table III-15. Employment of Individuals Surveyed

Category	Empl.	Unempl.	Retired	College Student
Husband/Male	200	45	42	13
Wife/Female	160	104	36	1
Single Parent	14	5	0	0
Child	13	5	0	1
Other	35	11	0	2
	======	======	======	======
Total	422	170	78	17

Sources: Household Survey of the Gainesville Study Area, 1986.
PLANTEC Corporation, 1986.

Table III-16. Occupations of the Individuals Who are Employed

Occupations	Number	Percent
Professional	81	20.1%
Construction	40	9.9
Service	223	55.3
Government	47	11.7
Other	12	3.0
	====	====
Total	403	100.0%

Note: Occupations were not provided for all employed individuals.

Sources: Household Survey of the Gainesville Study Area, 1986.
PLANTEC Corporation, 1986.

presented in Table III-17, shows that over 56 percent of employed persons are working in the western sectors of Gainesville. Conversely, less than 35 percent are employed within the east Gainesville sectors in and around the study area. Of the 141 persons working on the east side of town, only 12.6 percent indicated that they work in the southeast quadrant of the city. The remaining 35 persons work throughout all regions or outside of the city.

While the survey did not provide information regarding how many people are working within the study area, PLANTEC conducted a window and phone survey to estimate total employment in the study area (by place of employment). The results of this survey indicated that over 1,200 persons are employed in the study area with approximately 45 percent working in the retail sector. It is important to note that this total does not include self-employed individuals or sole proprietorship businesses.

Table III-17 . Location of Employment for the Study Area's Employed Population

District	Quadrant NW	SW	NE	SE	All Regions	Outside of Gainesville
1 & 2	22	29	11	2	2	7
3	16	21	7	0	1	0
4	4	7	7	0	2	0
5	16	14	23	24	4	1
6	0	0	0	0	0	0
7	12	5	9	6	0	0
8	2	3	2	3	2	0
9	7	6	1	0	1	0
10	3	4	5	4	2	0
11	6	18	15	0	2	1
12	9	14	8	10	7	0
13	7	4	2	2	3	0
Total Number	104	125	90	51	26	9
Percent	25.7%	30.9%	22.2%	12.6%	6.4%	2.2%

Sources: Household Survey of Gainesville Study Area, 1986.
PLANTEC Corporation, 1986.

SECTION IV

TARGET INDUSTRY ANALYSIS AND IDENTIFICATION

This section identifies, on a preliminary basis manufacturing industries suitable to the southeast Gainesville area. Recommendations are presented based on an assessment and evaluation of industry and locational characteristics that are favorable to the southeast Gainesville area. This brief analysis, which was undertaken to identify specific manufacturing industries suitable for the southeast Gainesville area, is considered to be the first step upon which a more comprehensive effort of this nature can be undertaken to enhance the revitalization opportunities in the study area. This level of detail is only a cursory review of geographic attributes and industry location requirements. Specific targeting of industries for marketing purposes will require additional research and development of specific strategies for the marketing program.

STATEWIDE GROWTH TRENDS AND SELECTED EMPLOYMENT SECTORS

Statewide growth and manufacturing trends provide a meaningful background for targeting businesses suitable for the Alachua County and southeast Gainesville area. Recent (1979 through 1984) growth of both employment and numbers of establishments in Florida is summarized for all of the two-digit industry classifications in Table IV-1. These classifications include:

- Manufacturing (SIC 20 through 29)
- Transportation, Communication and Utilities (SIC 40 through 49)
- Wholesale Trade (SIC 50 and 51)
- Finance, Insurance and Real Estate (SIC 60 through 67)

Table IV-1. Statewide Industry Growth Trends and Alachua County's Share, 1979-1984

SIC Code Description	Florida 1979 Employment (000)	Florida 1984 Employment (000)	Florida Annual Growth Rate (Percent)	Alachua County 1979 Share (Percent)	Alachua County 1984 Share (Percent)	Florida's Growth in Number of Firms 1979	Florida's Growth in Number of Firms 1984	Florida's Growth in Number of Firms Change 1979-1984 (Number)	Florida's Growth in Number of Firms Annual Growth Rate (Number)	Alachua's Growth in Number of Firms 1979	Alachua's Growth in Number of Firms 1984	Alachua's Growth in Number of Firms Change 1979-1984 (Number)	Alachua's Growth in Number of Firms Annual Growth Rate (Number)
20-39 Manufacturing	444	500	2.5%	1.0%	2.1%	12,062	14,002	1,940	388	110	125	15	3
20 Food and Kindred Spirits	49	48	-0.3	0.3	1.7	700	729	29	6	7	7	0	0
21 Tobacco Manufacturing	2	2	-3.6	0.0	0.0	48	45	(3)	(1)	NA	NA	NA	NA
22 Textile Mill Products	5	3	-8.7	0.0	0.0	135	111	(24)	(5)	NA	NA	NA	NA
23 Apparel and Textile Products	34	34	-0.2	0.0	0.1	1,137	1,225	88	18	NA	4	4	1
24 Lumber and Wood Products	23	27	3.3	1.7	1.6	1,405	1,340	(65)	(13)	17	19	2	0
25 Furniture and Fixtures	11	13	2.7	0.0	1.2	454	537	83	17	NA	NA	NA	NA
26 Paper and Allied Products	16	15	-1.5	0.0	10.6 E	156	186	30	6	NA	NA	NA	NA
27 Printing and Publishing	39	54	7.6	1.2	1.6	1,986	2,776	790	158	31	40	9	2
28 Chemical and Allied Products	26	26	0.0	0.2	14.0 E	474	526	52	10	4	7	3	1
29 Petroleum and Coal Products	2	2	-0.1	0.0	0.0	55	63	8	2	NA	NA	NA	NA
30 Rubber and Plastic Products	16	18	2.2	0.0	0.3	481	606	125	25	NA	NA	NA	NA
31 Leather and Leather Products	4	3	-2.4	0.0	0.0	83	97	14	3	NA	NA	NA	NA
32 Stone, Clay and Glass Prod.	21	24	3.0	0.6	4.2	718	762	44	9	10	6	(4)	(1)
34 Fabricated Metals	33	35	1.1	2.4	3.0	1,054	1,171	117	23	7	12	5	1
35 Machinery Exc. Electric	31	42	7.6	1.1	0.4	1,025	1,272	247	49	8	9	1	0
36 Electric Equipment and Supplies	60	75	5.1	2.8	0.2	499	657	158	32	6	5	(1)	0
37 Transportation Equipment	48	53	2.3	0.5	0.2	648	797	149	30	5	5	0	0
38 Instruments and Related Products	12	13	2.1	0.0	0.3	315	369	54	11	NA	5	5	1
39 Miscellaneous, Manufacturing Industries	8	9	1.2	3.7	0.8	530	600	70	14	5	4	(1)	0
40-49 Transportation, Comm. and Public Util.	196	213	1.8	0.7	2.2	6,860	8,921	2,061	412	53	72	19	4
42 Trucking and Warehousing	39	45	3.3	0.6	2.9	2,711	3,269	558	112	26	26	0	0
44 Water Transportation	13	15	3.9	0.0	3.3	679	762	83	17	NA	NA	NA	NA
45 Transportation by Air	38	42	2.2	0.0	0.6	467	665	198	40	NA	5	5	1
47 Transportation Services	10	14	7.5	0.5	0.6	1,513	2,344	831	166	7	11	4	1
48 Communication	65	75	3.1	0.3	1.7	600	882	282	56	10	19	9	2
50 Wholesale Trade - Durable Goods	114	138	4.4	0.8	1.7	11,663	15,273	3,610	722	107	123	16	3
51 Wholesale Trade-Nondurable	78	94	4.1	1.2	1.9	6,713	8,727	2,014	403	71	81	10	2
63 Insurance Carriers	40	43	1.6	2.1	1.2	1,475	1,694	219	44	27	29	2	0
73 Misc. Business Services	121	207	14.2	0.6	2.2	10,248	16,778	6,530	1,306	122	207	85	17
80 Health Services	190	279	9.4	1.5	3.2	14,655	19,926	5,271	1,054	226	316	90	18
89 Miscellaneous Services	40	55	7.6	2.2	1.8	4,637	6,886	2,249	450	76	115	39	8

Notes: E = Estimated;
NA = Unavailable or Withheld;
Annual Growth Rate Calculated Using Non-Rounded Values.

Sources: Florida Department of Labor and Employment Security.
PLANTEC Corportation, 1986.

- Services (SIC 70 through 89)

Manufacturing

Manufacturing employment grew in excess of 2.5 percent annually during the period of 1979 through 1984. In numerical terms, the state added in excess of 11,100 new manufacturing jobs annually.

The number of establishments reporting employment information also grew during the 1979 through 1984 period. During this time, 1,940 additional manufacturing businesses began reporting employment, or 388 new firms each year.

Transportation/Communications

Employment in the transportation and communications sectors grew at an annual statewide growth rate of 1.8 percent during the 1979 through 1984 period. In numerical terms, the state added about 3,400 jobs annually during this period.

In a similar fashion, firms providing transportation and communication services also grew in number during this period. During this time, over 2,000 additional firms began reporting employment, or 412 new firms each year.

Wholesale Trade

Employment in the wholesale trade sector increased by 41,000 new employees from 1979 through 1984. This equates to a 4.3 percent annual growth rate or approximately 8,200 new jobs each year. The number of businesses reporting new employment also grew by 5,625 establishments. This growth equates to a 6.1 percent annual growth rate or in excess of 1,100 new enterprises each year.

ALACHUA AREA INDUSTRY TRENDS AND CHARACTERISTICS

Manufacturing

Manufacturing employment in Alachua County has increased its statewide share during 1979 through 1984. By the addition of 15 new firms, the share rose from 1.0 percent in 1979 to 2.1 percent in 1984. Alachua County has located an average of three new firms in each of the last five years.

Transportation/Communications

During 1979 through 1984, Alachua County has seen growth in transportation and communications sectors with the addition of 19 new firms. Again the statewide share of employment rose from less than 1.0 to 2.2 percent for the sector, an average of four new firms located each year between 1979 through 1984.

Wholesale Trade

Employment in the wholesale trade sector also showed a strong increase in statewide share during 1979 through 1984. In 1979, the wholesale trade sector had a 2.0-percent share which increased to 3.6 percent in 1984. The county gained 26 new wholesale trade firms during this period totaling an average of five new firms annually.

Conclusions

The state and county trend analysis reveals that certain industrial sectors are expanding both statewide and in the Alachua County area (growing faster than the state average [increasing share, while other sectors are losing ground] growing slower than the state [decreasing share]). This analysis also indicates that certain SIC categories are remaining constant in terms of their statewide share, while the statewide growth continues (growing at the same rate as the state [constant share]).

The significance of this analysis to the southeast Gainesville area is the identification of trends which are needed for the success of attracting new manufacturing facilities into the area. The ability of the southeast Gainesville area to successfully attract industry will be predicated on specific locational attributes of the area and growth factors identified for Alachua County as a whole.

The growth of several SIC codes in the Alachua County area provides some basis for further expansion of similar and related industries into the southeast Gainesville area. For those industries which are showing a decreasing share, opportunities to modify specific locational attributes in the county and the southeast Gainesville area may attract these industries through design of a specific economic development strategy.

SELECTION OF MANUFACTURING INDUSTRIES

Screening Criteria

Selection of the most promising manufacturing concerns for the southeast Gainesville area is based primarily on consideration of the following:

- National trends and conditions of the industry
- Size of the industry as represented by recent statewide employment, by type of industry in Florida
- The degree and direction of the industry's recent growth in Florida
- The extent to which industry is represented in the Alachua County area

- Characteristics of the industry as they relate to labor, transportation and other resources and attributes of the southeast Gainesville area

Categories

Manufacturing industries suitable to the southeast Gainesville area focus on the labor intensive manufacturing categories. The selection process emphasized those industries that were labor intensive in food and kindred products, textile and apparel manufacturing, and miscellaneous manufacturing areas. These SIC codes focus on two-digit SICs 20 through 40. The analysis did not consider other SIC categories for wholesale trade services and other types of employment.

Screening Process

The screening process for targeting industries which were suitable to the southeast Gainesville area, focused on nine specific criteria. These criteria are as follows:

- High number of firms nationally (greater than 500 firms nationally)
- Payroll per employee (less than $10,000)
- Educational requirements of the labor force (less than 12 years)
- Growth and productivity of the SIC (greater than three percent annually)
- Labor requirements of operatives (greater than 50 percent of the work force)
- Labor requirements for laborers (greater than eight percent of the work force)

- o Historic trends and value of products shipped (greater than ten percent)
- o High volume of truck transportation for finished products (greater than 75 percent of total production)

Of these specific requirements, the analysis identified two levels of industries meeting the above specifications. Table IV-2 presents the four-digit SICs which met seven or eight of the nine screening criteria. Table IV-3 presents the list of four-digit SICs, which met six of the nine screening criteria. In combination, these two lists represent a first-level attempt to identify industries which meet greater than 75 percent of the overall screening criteria.

In addition, a second-level screening was done to identify those specific four-digit SICs which had employment ranging from 25 to 50 employees per plant. The purpose of this second-level screen was to identify specific SICs which could be targeted to meet the labor force availability within the southeast Gainesville area. These four-digit SICs are identified by an asterisk behind the four-digit SIC code on Tables IV-2 and IV-3.

SUMMARY AND CONCLUSION

It is the opinion of PLANTEC that the industries identified in this analysis show some potential for location in the southeast Gainesville area. While it is recognized that the level of screening is only a cursory review, we believe that the industries identified through this analysis can be solicited for location in the southeast Gainesville area.

With these industry requirements identified, the economic development strategy for the southeast Gainesville area can focus on

Table IV-2. Target Manufacturing Industries Meeting Seven or More Location Screening Criteria for the Southeast Gainesville Study Area

SIC Code	Description
22	TEXTILE MILL PRODUCTS
2253	Knit outerwear mills
23	APPAREL AND OTHER FINISHED PRODUCTS
2311	Men's, youths', and boys' suits, coats and overcoats
2321	Men's, youths', and boys' shirts (except work shirts) and nightwear
2327	Men's, youths', and boys' separate trousers
2328	Men's, youths', and boys' work clothing
2329	Men's, youths', and boys' clothing, not elsewhere classified
2331	Women's, misses', and juniors blouses, waists, and shirts
2335*	Women's, misses', and juniors dresses
2337*	Women's, misses', and juniors suits, skirts, and coats
2339	Women's, misses', and juniors outerwear, not elsewhere classified
2341	Womens', misses', and infants underwear and nightwear
2391*	Curtains and draperies
2392*	Housefurnishings, curtains, and draperies
2394	Canvas and related products
2395	Pleating, decorative and novelty stitching, and tucking for the trade
2399*	Fabricated textile products, not elsewhere classified
39	MISCELLANEOUS MANUFACTURING INDUSTRIES
3911	Jewelry, precious metal
3915	Jewelers' findings and materials, and lapidary work
3949	Sporting and athletic goods, not elsewhere classified
3955	Carbon paper and inked ribbons
3961*	Costume jewelry and costume novelties, except precious metal
3995*	Burial caskets
3999	Manufacturing industries, not elsewhere classified

*Denotes firms having an average of 25 to 50 employees per plant.

Source: PLANTEC Corporation, 1986.

Table IV-3. Target Manufacturing Industries Meeting Six Locational Screening Criteria for the Southeast Gainesville Study Area

SIC Code	Description
20	FOOD AND KINDRED PRODUCTS
2022	Cheese, natural and processed
2048	Prepared feeds and feed ingredients for animals and fowls, not elsewhere classified
2065	Candy and other confectionery products
22	TEXTILE MILL PRODUCTS
2221	Broad woven fabric mills, manmade fiber and silk
2241	Narrow fabrics and other small-wares mills: cotton, wool, silk, and manmade fiber
2251	Women's full length and knee length hosiery
2252	Hosiery, except women's full length and knee length hosiery
2254	Knit underwear mills
2257	Circular knit fabric mills
2258	Warp knit fabric mills
2259	Knitting mills, not elsewhere classified
2271	Woven carpets and rugs
2279*	Carpets and rugs, not elsewhere classified
2283	Yarn mills, wool, including carpet and rug yarn
2291	Felt goods, except woven fabrics and hats
2292	Lace goods
2293*	Paddings and upholstery filling
2294*	Processed waste and recovered fibers and flock
2298	Cordage and twine
23	APPAREL AND OTHER FINISHED PRODUCTS MADE FROM FABRICS AND SIMILAR MATERIALS
2299*	Textile goods, not elsewhere classified
2323*	Men's, youths', and boys'neckwear
2342	Brassieres, girdles and allied garments
2351	Millinery
2352	Hats and caps, except millinery
2361	Girls', children's, dresses, blouses, waists, and shirts
2363	Girls', children's, and infants' coats and suits
2369	Girls', children's, and infants' outerwear, not elsewhere classified.
2371	Fur goods
2381	Dress and work gloves, except knit and all-leather
2384	Robes and dressing gowns
2385	Raincoats and other water-proof outer garments
2386*	Leather and sheep-lined clothing
2387*	Apparel belts
2389*	Apparel and accessories, not elsewhere classified

Table IV-3. Target Manufacturing Industries Meeting Six Locational Screening Criteria for the Southeast Gainesville Study Area (Continued)

SIC Code	Description
2393*	Textile bags
2396	Automotive trimmings, apparel findings, and related products
2397	Schiffli machine embroideries
31	LEATHER AND LEATHER PRODUCTS
3111*	Leather tanning and finishing
39	MISCELLANEOUS MANUFACTURING INDUSTRIES
3931*	Musical instruments
3942	Dolls
3944	Games, toys, and children's vehicles; except dolls and bicycles
3952*	Lead pencils, crayons, and artists' materials
3962	Feathers, plumes, and artificial trees and flowers
3963	Buttons
3991*	Brooms and brushes
3993	Signs and advertising displays

*Denotes firms having an average of 25 to 50 employees per plant.

Source: PLANTEC Corporation, 1986.

providing the required physical location needs for these specific industries. In addition, the organizational and marketing components of the economic strategy should consider the establishment of an out-reach program to present the attributes of the southeast Gainesville area to appropriate corporate facility location managers for the specific firms within these four-digit SICs.

SECTION V

COMMUNITY RESOURCES AND SUPPORT FACILITIES

The first part of this section profiles various community service organizations which provide services to the southeast Gainesville area. The two major areas covered include educational/job training and placement assistance programs and general community service organizations. A general overview of public parks/recreation facilities and schools serving the study area is also contained in this section.

The last part of this section inventories the existing infrastructure serving the southeast Gainesville area. Scheduled highway improvements affecting the study area are discussed. Additionally, the capacity of the water and sewer systems to serve development in the area is addressed and the location of major trunk lines is identified.

COMMUNITY SERVICE ORGANIZATIONS

PLANTEC has identified 12 major community organizations which provide various services to the residents of the southeast Gainesville area. Seven of these organizations focus on educational/job training or job placement assistance. The remaining organizations play an active role in meeting the needs of the study area populace. A brief description of these 12 organizations and the specific services they provide follows.

Educational/Job Training and Placement Assistance Programs

Santa Fe Community College

Santa Fe Community College offers general training and industrial education programs in automotive mechanics; building construction; cosmetology; electrical construction; heating, air conditioning and ventilation; and welding. In addition, the college offers vocational development through the Work Exploration Center (WEC).

The WEC serves mentally, emotionally, and physically handicapped individuals whose capacity to participate in competitive employment is impaired. Individuals are provided opportunities to identify vocational goals, job objectives and participate in a decision-making process that facilitates the coordination of interests, values, and aptitudes as they relate to employment and/or training.

Established in 1968, the WEC has operated through a cooperative effort between the Office of Vocational Rehabilitation, the Division of Vocational-Technical Education and the community college. As noted above, programs are designed to provide special vocational work evaluation/adjustment to persons who are unemployed or underemployed. The primary focus is on services that provide each individual with skills or training to obtain employment. In addition to individualized attention, candidates are supportively integrated into other college programs, activities and classes as necessary.

The range of services provided includes work evaluation, individualized counselling, vocational decision making, employability skill training, career counselling, and other career services such as job placement, referral, and admission assistance.

Job Corps

A federally funded program, the Job Corps emphasizes vocational and technical training to obtain employment skills in the building maintenance, plumbing, electrical, electronics and assembly, business (retail and clerical), health, auto repair, cullinary arts, painting, plastering, and carpentry trades. This program is part of a network which is currently providing these services to approximately 350 persons throughout northeastern Florida.

Job Service

Job Service, established under the provisions of the Job Training Partnership Act of 1982 (JTPA), evolved from Title VII of the old CETA Act and plays a vital and active role in training and job development for the southeast Gainesville area. Its primary responsibilities include: the provision of counselling services, the administration of aptitude tests, and job placement/referrals. Since its inception, approximately 10,000 to 12,000 persons have utilized the programs. Of this number, about 2,500 or 25 percent of the applicants have obtained permanent employment--primarily in the service and construction sectors--with almost half being employed by various governmental agencies.

Adult Agri-Business Center

The Adult Agri-Business Center provides vo-tech programs to students in the area's high schools and community college, as well as pregnant teenagers and adults (over 16 years of age). Funded by the state, programs are focused on development of skills in the secretarial, computer, carpentry, masonry, and landscape maintenance fields. There is a current enrollment of about 700 persons, 400 of which are adults, 100 are pregnant teenagers, and the remaining 200 are equally split between the high school and community college students.

Focus on Careers

Established in October 1985, the Focus on Careers program is offered by Santa Fe Community College and receives annual funding through the Vocational Education Grant. The program is available to single parents or homemakers interested in entering the job market. One two-week course per month is offered with a limited enrollment of eight persons per session. Emphasis is placed on career planning rather than technical training with programs providing assistance in resume writing, how to fill out job applications, career interest assessments and mock interviews. The program also has a follow up procedure whereby individual employment status is checked one year after the course. Although no actual job placement services are offered, present demand for the course exceeds enrollment allocations.

Focus on Women

This program, also offered through Santa Fe Community College, receives its annual funding through the Florida Department of Health and Rehabilitative Service (HRS). The program is available to recently widowed or divorced women over 35 years of age who are presently working in the home. With a five-week course and limited enrollment of ten, the program annually serves between 150 and 200 women. The first two weeks of the course deal with personal growth and development issues. The last portion of the course concentrates on developing and refining employable skills. The underlying objective of the program is to provide transitional assistance to recently divorced or widowed homemakers. Focus on Women provides job referrals in conjunction with the Job Corps and Job Service programs. To date, this program has had a 60 to 65 percent placement rate on referrals.

Senior Community Development Employment Services

Senior Community Development Employment Services are available to persons 55 years of age or older. This program basically supplies part-time minimum wage jobs as interim employment until the individual secures a full-time job.

General Community Service Organizations

Gainesville Community Ministries

The Gainesville Community Ministries (GCM) is a private Christian agency funded primarily by local churches to help people with emergency needs who cannot otherwise find assistance. GCM provides emergency assistance through financial, medical, and clothing provisions. The agency's staff consists of one full-time administrator, one part-time assistant, and numerous volunteers. Last calendar year, the GCM served over 4,100 families and received almost $12,000 in food donations plus a federal grant of $7,000.

United Gainesville Community Development Corporation (UGCDC)

The UGCDC--a state chartered, tax-exempt, private non-profit organization--was established in 1981 and receives both city and state funding. State funding emanates from the Department of Community Affairs through the Community Development Corporation Support and Assistance Program. The state funding is on a five-year basis and requires that the program become self-sufficient by the end of the fifth year. The organization receives an annual allocation of local funds through the city's Community Development Block Grant program.

The program is designed to provide financial and technical assistance to small and minority-owned businesses. This is accomplished primarily by making money and loan packaging services available to these businesses through revolving loans and grants. In order to qualify for state-funded monies the applicant must reside or have his business in targeted census tracts (2, 6 or 7). City monies are available to any resident of Gainesville. A more detailed discussion of the UGCDC's revolving loan program is presented in Section VI of this report.

The UGCDC's goal for this fiscal year ending June 30th is to provide at least 300 hours of financial and technical assistance including, but not limited to, marketing, management, accounting and loan packaging services to at least 32 target and service area businesses. As of March 31st, the UGCDC has provided 235 hours of technical assistance to some 133 existing and proposed businesses.

Central Florida Community Action Agency (CAA)

CAA serves individuals and families whose income falls between 100 and 130 percent of the minimum income level requirements set by the Federal Government. The CAA provides general community development service through organizational assistance, grant writing, and project development. Other major program areas include direct services, referral services and community services. Each of these program areas are profiled below.

Direct Services - Nutrition:

- Commodities Program--Monthly distribution of USDA surplus food items through three neighborhood centers
- Garden Program--Spring and fall garden projects include the distribution of seed, fertilizer and pesticide twice a year

Direct Services - Housing Assistance:

- Weatherization--Provides services including installing insulation, replacing door and window frames, and repairing minor damage to ceilings, exterior walls and doors
- Emergency Home Repair--Repair homes affected by wind damage and severe deterioration not covered by the weatherization program

- Utilities Assistance--Provides for payment of energy and utility payments to needy people

Referral Services:

- Employment--Identify job opportunities and assist with applications; refer unemployed persons to jobs and/or training programs
- Education--Assist low-income citizens through proper referral to obtain high school or equivalency diploma
- Emergency Food and Shelter--Provide emergency food and shelter to those in need
- Health--Provide information about available health services and advise county health officials of each area's needs
- Dental Care--Provide limited dental care to certified low-income citizens within CAA's district

Community Services:

- Transportation--Assist with transportation to medical facilities, job interviews and other social service agencies
- Financial Counselling--Provide referrals and counselling assistance in consumer education
- Emergency Revolving Funds--Provide emergency funds for incidental dire needs
- Clothing and Household--Distribute donated clothing, furniture, and other household items to needy persons

CAA programs are funded by the Department of Community Affairs with the CAA board of directors serving as the grantees. Grants cover most of the program costs with some local in-kind match provided by the city's CDBG program. Other funding sources include HRS, County Commission, other local municipalities, and private contributions.

Neighborhood Improvement Program (NIP)

One of the most active in the southeast Gainesville area, the NIP provides individualized assistance in the following program areas:

- o Paint Up--Provides paint for households with incomes falling below 80 percent of the area's median income level; have been averaging between 50 to 60 houses a year
- o Solar Energy Conservation--Provides weather stripping, caulking, and financial assistance for hot water heaters and heat pumps to households meeting the same income guidelines as stated above; have assisted about 35 homes to date
- o Yard of the Month--Gives special recognition to best kept yard on a monthly basis
- o Tool Lending Project--Loans tools to individuals for yard maintenance purposes

All of the above are federally funded grant programs subject to 51 percent of the targeted population's income falling below 80 percent of the areawide income level.

4 C's Day Care Center

This federally funded program provides day care services to parents who are seeking employment. If after a specified period of time the parent has secured permanent employment, the child can remain in the center for the duration of the employed period.

PUBLIC SCHOOLS AND PARKS

In addition to the Gainesville Agri-Business Center and the Santa Fe Community College (south campus), the southeast Gainesville area has six elementary, two junior high, and one high school serving its populace. As Table V-1 shows, overall enrollment at these nine schools has declined seven percent to 6,333 registered students from the 1982-83 figure of 6,826. The biggest change in enrollment is evident in the elementary category which accounted for almost 84 percent of the overall downward trend. The junior and senior high schools maintained relatively stable student populations. This corroborates the data in Section II and suggests that while the elementary students are moving up in the system over time, new students (sign of positive grow) are not replacing them at the same rate.

There are nine major parks and four "tot lots" which provide recreational opportunities to those people living in southeast Gainesville. These nine parks--Citizen Field, Lincoln/Williams, Lynch, Meadowbrook/McPherson, Northeast, Roper, Smokey Bear, Woodlawn, and Young American--provide various recreational facilities ranging from swimming pools and ballfields to tennis courts, playgrounds, and picnic areas. For a city its size, Gainesville is considered to have one of the best recreational systems in the state.

INFRASTRUCTURE

Transportation facilities and utility services are profiled in this subsection in terms of their general adequacy in promoting and facilitating economic development in the southeast Gainesville area.

Transportation

The transportation system in the southeast Gainesville area is a very strong asset in facilitating economic development in the area. The general area has good access to both north- and south-bound I-75 traffic via Williston Road, the University Boulevard/Newberry Road corridor, and

Table V-1. Inventory of Public Schools Serving the Southeast Gainesville Area

Schools	Number of Enrolled Students 1982-83	1983-84	1984-85	1985-86
Elementary (K through 5)				
Duval	520	477	520	503
Lake Forest	477	455	477	463
Marjorie Rawlings	672	615	672	558
Metcalf	736	734	736	526
Prairie View	604	622	604	529
Wiliams	543	515	543	561
Subtotal	3,552	3,418	3,552	3,140
Junior High (6 through 8)				
Howard Bishop	956	1,023	956	977
Lincoln	1,083	1,011	1,083	976
Subtotal	2,039	2,034	2,039	1,953
Senior High (9 through 12)				
Eastside	1,235	1,827	1,235	1,240
TOTAL	6,826	7,279	6,826	6,333

Source: PLANTEC Corporation, 1986.

39th Avenue. It is generally well served by local arterials--especially Waldo Road which serves as a connecting link to northeast bound U.S. 301 traffic. Moreover, the Gainesville Regional Airport is in close proximity located approximately three miles from the center of the study area.

Highways

As noted above, the southeast Gainesville area is provided excellent access by major roadways--such as University Avenue, Waldo Road and Williston Road--which transverse the study area. Also, Hawthorne Road provides easy access from the rural portion of the study area to the major roadways. The roadway system, particularly the Waldo Road corridor because of its linkage to the airport, enhances the suitability for distribution-oriented industry.

There are three major highway improvements that will have a significant impact on the study area. The first, the extension and upgrading of 39th avenue from two to four lanes from I-75 to the airport, is currently under way. Once completed, this improvement will provide a direct route from the Waldo Road corridor to northbound I-75 traffic. Another improvement, slated for the summer of 1987, will widen 18th street (from 18 to 30 feet) north from Hawthorne Road to 5th Avenue. This will facilitate better access from the rural portion of the study area to the Waldo Road corridor and the airport. The last major improvement is the extension of SE 16th Avenue from Williston Road to 15th Street. This would provide a direct access route from the Kincaid Road loop to Highway 441 near the major employment centers. A major benefit would be diverting traffic from the congested University Avenue corridor for those people with a northwest quadrant destination.

Two other minor highway considerations are the extension of SE 27th Avenue from Hawthorne Road to University Avenue and the extension of SE 8th Avenue from 20th Street to Hawthorne Road. These improvements would have the greatest impact on the Eastgate Plaza site by providing easier access from the respective neighborhood areas served by these roads.

Utilities

Water and Sewer

All centralized water and sewer services in the city are provided by the Gainesville Regional Utilities Authority. The main water plant is located at NE 53rd avenue and NE 15th street. The present capacity of this facility is 30 million gallons per day (GPD) with a current average daily flow of approximately 18.5 million GPD. Similarly, the sewer treatment plant at SE 16th and Main has an existing capacity of ten million GPD with an average daily flow of about 7.5 million GPD. It is evident from these numbers that major trunk line availability would be more of a constraint to development in the southeast Gainesville area rather than system capacity.

The location and size of water lines in the study area major corridors are summarized below:

- Williston Road - 12" ending at SW 23rd Terr.
- S. Main St. - 12"
- Hawthorne Rd. - 12"
- Kincaid Rd. - 12" from Hawthorne Rd. to SE 24th Pl.
- SE 15th/41st St. - 12" to SE 22nd Ave.
- 18th St. - 24" from NE 10th Ave. to SE 8th Ave.

The location and size of sewer lines in the study area major corridors are as follows:

- o **Williston Road**

  East of Hwy. 441-no existing sewer up to NE 16th Ave.

  West from Hwy. 441 to SW 21st St. - 16" Gravity

  SW 21st St. to SW 23rd Terr. - 10" Force Main

  SW 23rd Terr. to SW 34th St. - 6" Force Main

  West beyond I-75 - 6"

- o **South Main Street**

  South of 16th Ave. - no existing sewer

  16th Ave. to 13th Ave. - 16" Gravity

  North of 13th Ave. - 12" Gravity

- o **Hawthorne Road**

  University Ave. to 24th Ave. - 12" Force Main

  Beyond 24th Ave. - 6" iron pipe

SECTION VI

FUNDING SOURCES FOR SMALL BUSINESSES AND ECONOMIC DEVELOPMENT PROGRAMS

Federal, state, and local programs that are available to assist the southeast Gainesville area in the potential funding of its economic development program are identified in this section. These funds can be used to finance development loans and for infrastructure to support projects. While this list is not exhaustive, it does represent the major sources of assistance available to eligible communities and projects. Because of its local significance, special emphasis is placed on the United Gainesville Community Development Corporation's (UGCDC) revolving loan fund program.

PLANNING, RESEARCH, INFRASTRUCTURE, SITE ACQUISITION AND IMPROVEMENTS

The following programs are available to assist local governments in studying, planning, implementing, and for research concerning various economic development strategies. Also listed are programs which will fund acquisition of land for various purposes as well as public infrastructure necessary for various types of development.

U.S. Farmers Home Administration (FmHA)/Community Facilities Loan Program

Funds are available to small communities for water and sewer systems, plus other essential infrastructure needs. However, only communities under 10,000 population are eligible for water and sewer system financing.

Agency: U.S. Farmers Home Administration

Long-Term Economic Deterioration Program (LTED) Sudden and Severe Economic Dislocation Program (SSED)

Funds are available under the SSED program to cover up to 75 percent of the costs of planning and implementing an economic development dislocation project. LTED funds are available for implementation purposes only. Grants provide a revolving loan fund to finance projects. Review of the project with EDA is required prior to application and must be in an EDA approved area.

Agency: Economic Development Administration, State and Regional Offices

Public Works and Development/Facilities Grants

Construction and site preparation funds for public works facilities which promote long-term economic growth are available under this program. These include industrial parks and water and sewer systems primarily serving industrial users and other capital projects.

Agency: Economic Development Administration, State and Regional Offices

Land and Water Conservation Fund Program

Grant assistance is provided to states and, through them, to political subdivisions for the acquisition and development of public outdoor recreation areas and facilities. In Florida, natural resource-oriented projects have priority for funding if such projects are determined to be compatible with state recreation plans. Projects must be available for use by the general public, with development of basic rather than elaborate facilities emphasized. Projects furnishing a broad range of outdoor recreation uses and experiences are also preferred. This program is financed on a 50 percent local matching basis.

Agency: U.S. Department of the Interior, Bureau of Outdoor Recreation

Florida Recreation Development Assistance Program

This program provides financial assistance to public bodies that are incorporated, chartered, or otherwise declared as legally constituted political subdivisions or agencies of the state for the purpose of acquiring and/or developing public recreation resources and facilities. The program is designed for locally oriented rather than regional projects. The state may provide 100 percent of the project cost up to $50,000. Any cost in excess of this amount must be matched by the project sponsor on a 50-50 basis, up to a maximum participation by the state of $100,000.

Agency: Florida Department of Natural Resources

Urban Park and Recreation Recovery Program (UPARR)

The UPARR program provides direct matching grant assistance to communities to restore deteriorating facilities, to encourage the development of new recreation programs, to stimulate local support of recreational planning and to improve recreation management. Certain jurisdictions are eligible for 85 percent of the UPARR funds based on Census Bureau indicators of stress or need. Local governments located within SMAs may also compete for funds. The UPARR includes the following types of grants:

- Rehabilitation grants which provide 70-30 matching funds to rehabilitate, renovate or expand existing indoor or outdoor recreation facilities.
- Innovative grants are also available on a 70-30 matching basis to help cities implement new approaches to providing recreation services.

- Recovery Action program grants are 50-50 matching grants for planning assistance in the development of a local Recovery Action Program for the long-range improvement of local recreation services. This program is required in order to qualify for the UPARR rehabilitation or innovation grant.

Agency: U.S. Department of the Interior, Heritage Conservation and Recreation Service

BUSINESS ASSISTANCE

The following programs are available to assist start-up and expanding businesses in the southeast Gainesville area.

Industrial Revenue Bonds

Industrial Revenue Bond (IRB) financing is one of the most economical and advantageous means of funding capital expenditures for new facilities. The costs of IRB financing are much lower than conventional debt primarily because bondholders do not pay income tax on their interest income. Also, IRBs are not subject to SEC registration which can reduce certain associated issuance costs for the company. IRB financing permits 100 percent funding of the project's cost within federally specified dollar limits, leaving the firm's equity capital available for working capital or other uses. Bond proceeds may be used for: architectural and engineering expenses; building construction costs, including interest; purchase and installation of machinery and equipment, furniture, and fixtures; and any legal, underwriting, and printing costs associated with issuing the bonds. The bonds are issued by a local government agency with principal and interest on the bonds paid solely by the beneficiary company through the lease or purchase of the facilities.

To insure the tax-free status of the issue, it is imperative that the local governing body agree, by resolution or similar official action, to issue the bonds for the project before the firm commences any work; contracts for such work; or acquires land, materials, or equipment. In addition, the firm may elect to utilize the state's optional bond validation process to avoid any future question regarding the tax-free status of IRBs issued by local governments.

It is important to point out that the recent passage of the Deficit Reduction Act (DEFRA) of 1984 limits the amount of IRBs that can be issued in each state in any calendar year. The limit is $150 per capita or $200 million, whichever is greater. Therefore, Florida's limit would be the per capita allocation, or approximately $1.6 billion of bond allocations. This per capita cap continues until 1987, when the multiplier would be reduced to $100 to reflect the scheduled expiration of authority to pass small issue IRBs.

Pursuant to legislative authority in DEFRA, Governor Graham issued Executive Order Number 84-181 which allocates the bond limitations in the following manner:

- 50 percent of total yearly allocation earmarked for counties on a population based proportion
- 45 percent of total yearly allocation to the "state allocation pool" for priority projects as defined in the EO
- Five percent of total yearly allocation set aside for the "small issuers pool" for counties with less than 50,000 population.

Agency: Executive Office of the Governor, Office of Planning and Budgeting

U.S. Small Business Administration 503 Loan Program

The SBA 503 program is another funding tool that provides excellent opportunities for small business investment. Administered through the Florida First Capital Finance Corporation (FFCFC), it offers up to 40 percent long-term financing for real estate and capital expenditures that have a life expectancy of at least 15 years. A conventional first mortgage, covering 50 percent of loan value with no government guaranty, is made to the business with the FFCFC making the remaining 40 percent second mortgage which is 100 percent guaranteed by the SBA.

The business is responsible for raising the remaining ten percent equity for the project. With a second mortgage cap of $500,000 a business could conceivably borrow up to $1.2 million utilizing the 50 percent first mortgage loan capability. Therefore, by combining the two programs the small business is able to borrow up to 90 percent of total project costs for a longer loan term at below market interest rates satisfying all parties.

Agency: Florida Department of Commerce, Office of Business Finance

Economic Opportunity Loans

Economic Opportunity Loans or loan guarantees of up to $100,000 are available for minority-owned businesses located in low-income/high unemployment areas. These loans may be used for the purchase of land and fixed assets, or for working capital.

Agency: Small Business Administration

U.S. Small Business Administration Guaranteed Loan Program

The SBA 7(a) loan program enhances commercial credit accessibility by guaranteeing up to 90 percent of the principal and interest of a bank loan. The program is for moderately strong credit risks unable to obtain conventional financing at comparable rates and terms. Funds can be used for working capital, machinery and equipment, purchase of land and buildings, and renovation and construction of facilities.

Agency: Small Business Administration

Section 312 Rehabilitation Loans

Low-interest, long-term rehabilitation loans are available through HUD for residential and commercial projects. Priority is given to cities that use a portion of their CDBG funds to support rehabilitation efforts.

Agency: Department of Housing and Urban Development

United Gainesville Community Development Corporation (UGCDC) Revolving Loan Fund (RLF)

As noted in Section V, the UGCDC is a state chartered private non-profit organization. Its primary focus is to provide technical assistance to small and minority businesses. These services are divided into the following four program areas:

- Expand the amount of capital available to businesses which have an impact on the target areas (CT 2, 5, 6 and 7) by providing low interest funds through its loan pool program
- Provide business counselling services in the areas of management, accounting, credit, finance and contract procurement to assure that small and minority businesses will maintain a competitive advantage in the volatile economic environment
- To facilitate contact with public agencies that indicate a desire to contract with small and minority-owned businesses;

direct area residents to the appropriate city or county agencies for action on particular problem areas

- Assume a developer role when feasible or assert an advocacy role in the creation, building, or development efforts in designated target areas, especially in the residential and commercial real estate development areas.

Essential to the success of the overall CDC program is the availability of public dollars to match and provide incentive for private sector investment in disadvantaged communities. To this end, the primary mechanism used by UGCDC is the Revolving Loan Fund (RLF) program. RLF loans range in size from $5,000 to $50,000 and provide needed expansion or start-up money for working capital, inventory, and equipment purchases. The combination of lower than market interest rates and longer terms (up to 15 years for buildings) make RLF loans attractive as an alternative financing source for small and minority-owned businesses.

One of the key elements in the success of the RLF program is the participation by the local banks who actually purchase and service every RLF loan. On the purchase of a loan, UGCDC provides the participating bank with a cash deposit guaranteeing up to 90 percent of the principal loan amount in addition to the borrower's collateral. Thus, the bank purchases below-market-rate loans and provides loan closing services, including the perfection of all collateral security interests, while UGCDC is paid only a six-percent interest rate on the deposits. The bank then receives a four-percent spread to compensate for its participation and loan servicing.

This public/private partnership has proven to be a mutually beneficial and profitable arrangement for all involved parties. Through RLF many small businesses have established banking relationships that previously did not exist and should enable direct borrowing in the future.

The current funding level of this program is $250,000 from the state and $110,000 from the city's CDBG allocation. This money is committed on an annual basis and virtually there for the taking. A unique provision of the state allocation taking effect next fiscal year is that if other CDC's have not used their allocated $250,000 by April 1, then any CDC can request up to an additional $250,000 provided its initial allotment has been fully expended. This means that the pool of RLF monies for the UGCDC has the potential to reach $650,000 next fiscal year if the local contribution is increased by $40,000.

SECTION VII

COMMERCIAL REVITALIZATION AND ECONOMIC DEVELOPMENT STRATEGIES

Opportunities for commercial revitalization projects are highlighted in this section. Specific locational recommendations are made for potential redevelopment projects. A preliminary target industry analysis, which identifies certain four-digit SIC manufacturing industries suitable to the southeast Gainesville area, is summarized and presented as the first step in an overall economic development strategy for the area. An assessment of specific sites for industry location within the area is included, along with the cost for infrastructure improvements where appropriate. Finally, recommendations are presented to help foster economic development and commercial revitalization efforts in the southeast Gainesville area.

COMMERCIAL REVITALIZATION

The market analysis and survey results presented in Section III identified limited commercial revitalization opportunities for the southeast Gainesville area. While the demand for a neighborhood or community shopping center does not exist, it is the consultant's opinion that there is a potential for one or two small commercial centers. These centers could range in size from 5,000 to 10,000 square feet which would enable them to easily accommodate stores in the 1,000-to-3,000-square-foot range. The type of development concept envisioned for these centers would be commercial and personal service store-front space clustered into a multi-purpose tenant building or strip development along a major transportation route.

The retail market and household survey analysis indicated a demand for commercial and personal service establishments such as: additional restaurants to serve local neighborhood residents, a discount drug store, a hardware store, a small apparel/shoe store, medical and related services, laundromat, and beauty parlors.

In order to determine prime commercial nodes for redevelopment, PLANTEC--through field observations--identified potential locations for these centers in terms of physical and locational amenities. This assessment included such criteria as good highway access and visibility, available utilities, proper zoning, and the necessary critical mass to support new development. These locations, in order of their significance, are presented in Figure 6.

It is important to point out that while the initial emphasis in this regard was focused on the deserted Alavac Shopping Center site on Williston Road, during the course of this study PLANTEC learned that this site had been purchased for purposes other than commercial use. Therefore, this site was not considered as part of the locational analysis.

As indicated in Figure 6, the nucleus of potential commercial redevelopment sites is focused on the Waldo Road/University Avenue intersection. The primary reason for this is that these four sites most favorably satisfied the above-stated criteria. Tract 1C, at the intersection of NE 12th Street and Waldo Road, is approximately two acres and presently has two substandard uninhabited single-family homes on site. It is situated in an excellent location, a short distance from the new Social Security Administration Building that is under construction on Waldo Road. Because of its proximity to 1C, this new facility by itself presents an attractive opportunity for commercial development which can capitalize on its employment base (e.g. food/deli

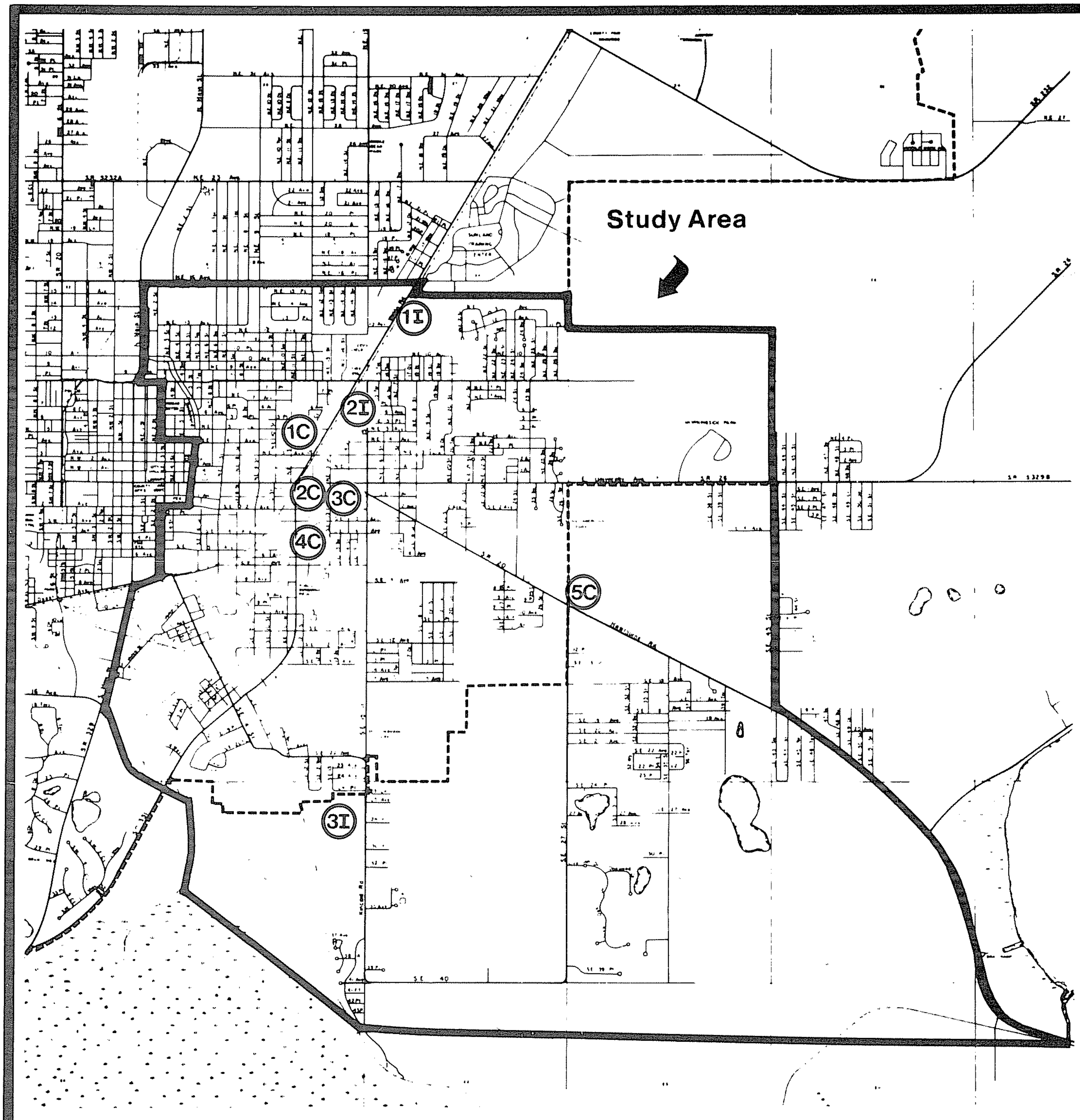

Figure 6

Potential Commercial and Industrial Redevelopment Sites

SOURCE: PLANTEC, 1986.

operation, dry cleaning, etc.) and the people it will be serving. Additionally, Waldo Road is well-traveled by local and non-local traffic because of the airport and linkage to U.S. Highway 301.

Tract 2C, at the southeast quadrant of Waldo Road and University Avenue, is even better situated in terms of exposure and visibility. Located, at perhaps, the busiest intersection in the study area, it is directly across from the recently-opened Iron Horse restaurant and extends south to SE 1st Avenue and east over to SE 12th Street. Albeit there is a small cemetery at the northwestern corner of the tract, there appears to be a little over two acres of redevelopable land. The major caveat to revitalizing this tract lies in the fact that three or four small single-family homes and one business would have to be relocated, which might be cost prohibitive. Nevertheless, the economic under utilization of this property should be considered in terms of its redevelopment potential because of its strategic location.

The third site identified as a potential commercial node is Tract 3C which is just east of NE 13th Street on the south side of University Avenue. With frontage on University, this site has good access and visibility to all eastbound traffic going towards Hawthorne Road. The last site identified as having good short-term redevelopment potential is Tract 4C located just four blocks south of University Avenue at the southeast intersection of SE 11th Street (Waldo Road) and 4th Avenue. While this site does not have the critical mass advantage of the first three, it is located on a major thoroughfare (SE 11th St./Waldo) and is on the local truck route (SE 4th Ave). Moreover, SE 4th Avenue appears to be a major street which funnels traffic into the Central Business District from the study area.

One other site was identified as having a longer term (more than five years) possibility of facilitating commercial development. Tract 5C (across from Eastgate Plaza) is a large vacant parcel located on a major thoroughfare which can be supported by areas of concentrated population in the study area.

No major infrastructure improvements would be necessary to support development on any of the above sites as major water lines are adjacent to all locations and sewer lines are in close proximity or could be provided by a septic system.

ECONOMIC DEVELOPMENT

The foremost economic issue and concern presently facing the southeast Gainesville area is the lack of employment opportunities for the area's lower skilled workers which translates into an unofficial "real" unemployment rate that PLANTEC estimates is in the 20-to-30-percent range. The primary reason for the large difference between this estimate and published data--which indicates an unemployment rate of 4.5 percent--is that the proportion of the population typically classified as discouraged workers (those not actively seeking employment) is not included in the published unemployment calculation. Therefore, this issue is not perceived by many to be the problem that it really is.

In order to address this issue, PLANTEC on a preliminary basis, conducted a target industry analysis to identify specific manufacturing industries that would be suitable to the southeast Gainesville area. This cursory review was based on the area's perceived geographic attributes and certain industry location requirements. However, the consultant strongly suggests that specific targeting of industries for marketing purposes will require a more comprehensive approach and one that should include specific strategies for a marketing program. This type of analysis was well beyond the scope of this report.

The first step in this brief analysis was to assess the statewide as well as Alachua County's industry growth trends and characteristics. Once the favorable employment sectors were identified, nine specific screening criteria were applied (see Section IV) to these major SIC codes. This resulted in two separate lists of industries which met these specifications (refer back to Tables IV-2 and IV-3). The labor force availability of the southeast Gainesville area suggested that special attention should also be given to those firms in the 25-to-50 employee per plant range.

The end result after all these stipulations and criteria were applied, included seven firms at the four-digit SIC level with the following major product descriptions:

--Women's, misses', and junior apparel products (2335, 2337)

--Curtains, draperies, and related house-furnishing products (2391, 2392)

--Costume jewelry and novelties, except precious metal (3961); and

--Burial caskets (3995).

These industries met at least seven of the general screening criteria and employed, on average, less than 50 but more that 25 people.

Another list was produced which met six of the general screening criteria and also employed the same range of people. This secondary list included 13 firms at the four-digit SIC level with the following major product descriptions:

--Carpets and rugs, not elsewhere classified (2279)

--Paddings and upholstery filling (2293)

--Processed waste and recovered fibers and flock (2294)

--Textile goods, not elsewhere classified (2299)

--Mens', youths', and boys' neckwear (2323)

--Leather and sheep-lined clothing (2386)

--Apparel belts and accessories, not elsewhere classified (2387, 2389)

--Textile bags (2393)

--Leather tanning and finishing products (3111)

--Musical instruments (3931)

--Lead pencils, crayons, and artists' materials (3952); and

--Brooms and brushes (3991).

The preliminary finding is that favorable conditions exist for possible recruitment of these two groups of industries (the second group to a lessor degree) to locate in the southeast Gainesville area. However, the need for a more detailed analysis and specific marketing program in this regard cannot be overemphasized.

In terms of appropriate industry sites, PLANTEC identified three particular locations in the study area for consideration. Zoned industrial, they were chosen because of their availability and accessibility and appear to be large enough to accommodate the scope of industrial development as outlined above. Moreover, two of the three parcels are currently listed for sale.

The primary consideration for these sites, especially Tracts 1I and 2I, was accessibility to the interstate, airport, and major utility lines (Figure 6). The surrounding industrial character of the Waldo Road corridor was also an important factor in designating the following two parcels for industrial development potential. Parcel 1I is a 36-

acre site fronting Waldo Road and is approximately two miles from the airport. Parcel 2I also fronts Waldo Road and is located about one-half mile south of the first site. Both of these tracts are afforded easy access to I-75 via the Waldo/Williston Road corridor. Once the improvements to 39th Avenue are complete, this will provide another four-laned and closer alternative route for northbound I-75 traffic. A major water trunk line runs down Waldo to NE 10th Avenue and then continues down 18th Street with a major sewer line going as far south as NE 16th Avenue along Waldo Road. The only improvement needed would be an extension of the sewer line from NE 16th Avenue approximately one-half mile south to NE 8th Avenue to serve Tract 2I. This could be accomplished for an estimated cost of $85,000 in 1985 dollars.

The final Tract 3I, is located on the west side of SE 15th Street just south of SE 28th Place. This site is situated on a local bus route and is currently up for sale.

In order to provide desirable access to the interstate, SE 16th Avenue would have to be extended eastward from Williston Road just over a mile. Excluding right-of-way costs, the estimated expenditure for this improvement (assuming a two-lane rural road) would be approximately $500,000. However, it is important to point out that this improvement would also tremendously benefit the whole southeast rural part of the study area by providing the Kincaid Road/SE 41st Street/SE 15th Street loop with a direct access route to the U.S. Highway 441 corridor and major employment centers in the city's western sections. In addition, if centralized sewer service was required it would cost approximately $270,000 to extend the existing 16" gravity line from the Main Street/SE 16 Avenue intersection.

The eventual success in attracting any type of industry to the area depends heavily on the cooperation and coordination of efforts by both levels of local government, the chamber of commerce, University of Florida officials, and other key local business and community leaders.

Recommendations

In order to promote commercial revitalization and economic development opportunities in the southeast Gainesville area, PLANTEC recommends that the Policy Advisory Committee (PAC) take the following specific actions:

- Establish a task force from the existing PAC members to implement the strategies outlined in this report
- Assure that the southeast Gainesville area is adequately represented on the proposed "Alachua County Economic Development Commission" and/or the proposed Visions 2000 "Improved Economic Opportunity Council"
- Monitor the current target industry analysis at the regional and county level for its application to the southeast Gainesville area
- Assign a task force member to work closely with the Chamber and city/county officials in recruiting selected industries for the southeast Gainesville area
- Develop specific marketing goals and a program that can be incorporated into the county's annual marketing program which emphasize the special locational attributes of the southeast Gainesville area (i.e., lower real estate prices, transportation strengths, available development financing, etc).

- Pursue EDA or other available implementation grant funds for the southeast Gainesville program area, such as Title I which can fund infrastructure needs for industrial sites
- Focus on the retention and expansion of existing businesses and encourage revitalization of vacant buildings in the study area through available financing techniques such as the UGCDC Revolving Loan Fund
- Work with the local governments to establish a development incentive program that would encourage redevelopment and create new jobs through a public/private partnership (e.g. equity participation agreements or participatory leases for private sector development of government-owned property in study area)

Appendix Table A-1. Population by Age and Sex, for Census Tract #5, 1970-1985

Age	1970				1980				1985				Total Annual % Change	
	Male	Female	Total	Percent	Male	Female	Total	Percent	Male	Female	Total	Percent	1970-1980	1980-1985
0-5	202	188	390	7.89%	127	136	263	5.61%	124	119	243	5.81%	-3.26%	-1.52%
6-13	278	280	558	11.30%	132	163	295	6.29%	147	150	297	7.10	-4.71%	0.14%
14-17	154	162	316	6.40%	86	87	173	3.69%	57	73	130	3.11	-4.53%	-4.97%
18-24	515	448	963	19.49%	484	505	989	21.10%	183	181	364	8.70	0.27%	-12.64%
25-34	358	309	667	13.50%	646	619	1,265	26.98%	673	728	1,401	33.48	8.97%	2.15%
35-44	210	244	454	9.19%	189	166	355	7.57%	332	269	601	14.36	-2.18%	13.86%
45-54	244	285	529	10.71%	159	178	337	7.19%	128	135	263	6.29	-3.63%	-4.39%
55-64	207	288	495	10.02%	179	242	421	8.98%	148	194	342	8.17	-1.49%	-3.75%
65 +	203	365	568	11.50%	212	378	590	12.59%	187	356	543	12.98	0.39%	-1.59%
Total	2,371	2,569	4,940	100%	2,214	2,474	4,688	100.00%	1,979	2,205	4,184	100.00	-0.51%	-2.15%

Sources: Donnelly Marketing Information Services
PLANTEC Corporation, 1986.

Appendix Table A-2. Population by Age and Sex, for Census Tract #6, 1970-1985

Age	1970				1980				1985				Total Annual % Change	
	Male	Female	Total	Percent	Male	Female	Total	Percent	Male	Female	Total	Percent	1970-1980	1980-1985
0-5	290	297	587	14.2%	289	286	575	11.8%	259	244	503	11.5%	-0.20%	-2.50%
6-13	461	416	877	21.2	429	360	789	16.2	330	307	637	14.6	-1.00%	-3.85%
14-17	166	194	360	8.7	232	268	500	10.3	182	162	344	7.9	3.89%	-6.24%
18-24	223	314	537	13.0	297	387	684	14.0	323	359	682	15.6	2.74%	-0.06%
25-34	226	299	525	12.7	297	387	684	14.0	302	402	704	16.1	3.03%	0.58%
35-44	160	221	381	9.2	184	292	476	9.8	182	272	454	10.4	2.49%	-0.92%
45-54	158	190	348	8.4	179	228	407	8.3	146	204	350	8.0	1.70%	-2.80%
55-64	106	159	265	6.4	162	195	357	7.3	140	184	324	7.4	3.47%	-1.85%
65 +	118	143	261	6.3	185	219	404	8.3	163	212	375	8.6	5.48%	-1.44%
Total	1,908	2,233	4,141	100.0	2,254	2,622	4,876	100.0	2,027	2,346	4,373	100.0	1.77%	-2.06%

Sources: Donnelly Marketing Information Services
PLANTEC Corporation, 1986.

Appendix Table A-3. Population by Age and Sex, for Census Tract #7, 1970-1985

Age	1970				1980				1985				Total Annual % Change	
	Male	Female	Total	Percent	Male	Female	Total	Percent	Male	Female	Total	Percent	1970-1980	1980-1985
0-5	597	604	1,201	14.3%	518	509	1,027	11.1%	506	482	988	11.1%	-1.45%	-0.76%
6-13	916	831	1,747	20.8	692	742	1,434	15.5	618	636	1,254	14.1	-1.79%	-2.51%
14-17	345	402	747	8.9	432	428	860	9.3	315	335	650	7.3	1.51%	-4.88%
18-24	514	603	1,117	13.3	576	682	1,258	13.6	619	617	1,236	13.9	1.26%	-0.35%
25-34	538	621	1,159	13.8	716	912	1,628	17.6	671	903	1,574	17.7	4.05%	-0.66%
35-44	385	446	831	9.9	399	554	953	10.3	505	616	1,121	12.6	1.47%	3.53%
45-54	312	393	705	8.4	402	449	851	9.2	333	415	748	8.4	2.07%	-2.42%
55-64	237	258	495	5.9	272	349	621	6.7	268	382	650	7.3	2.55%	0.93%
65 +	188	214	402	4.8	256	364	620	6.7	272	387	659	7.4	5.42%	1.26%
Total	4,032	4,372	8,404	100.0	4,263	4,989	9,252	100.0	4,107	4,773	8,880	100.0	1.01%	-0.80%

Sources: Donnelly Marketing Information Services
PLANTEC Corporation, 1986.

Appendix Table A-4. Household Income for Census Tract #5, 1970-1985

Income Level	1970		1980		1985	
	Households	% Total	Households	% Total	Households	% Total
$0 - $7,499	897	49.0%	592	27.7%	405	20.7%
$7,500 - $9,999	289	15.8%	340	15.9%	230	11.8%
$10,000 - $14,999	402	21.9%	400	18.7%	271	13.9%
$15,000 - $24,999	216	11.8%	476	22.3%	587	30.1%
$25,000 - $34,999	16	0.9%	222	10.4%	307	15.7%
$35,000 - $49,999	7	0.4%	79	3.7%	109	5.6%
$55,000 +	5	0.3%	30	1.4%	43	2.2%
Total	1,832	100.0%	2,139	100.0%	1,952	100.0%

Note: Percent's may not add to 100% due to rounding.

Sources: Donnelly Marketing Information Services.
PLANTEC Corporation, 1986.

Appendix Table A-5. Household Income for Census Tract #6, 1970-1985

Income Level	1970		1980		1985	
	Households	% Total	Households	% Total	Households	% Total
$0 - $7,499	842	71.0%	671	45.5%	471	34.8%
$7,500 - $9,999	232	19.6%	164	11.1%	115	8.5%
$10,000 - $14,999	95	8.0%	244	16.5%	242	17.9%
$15,000 - $24,999	17	1.4%	275	18.6%	364	26.9%
$25,000 - $34,999	0	0.0%	83	5.6%	110	8.1%
$35,000 - $49,999	0	0.0%	32	2.2%	43	3.2%
$55,000 +	0	0.0%	7	0.5%	9	0.7%
Total	1,186	100.0%	1,476	100.0%	1,354	100.0%

Note: Percent's may not add to 100% due to rounding.

Sources: Donnelly Marketing Information Services.
PLANTEC Corporation, 1986.

Appendix Table A-6. Household Income for Census Tract #7, 1970-1985

Income Level	1970		1980		1985	
	Households	% Total	Households	% Total	Households	% Total
$0 - $7,499	1,402	61.7%	920	31.2%	672	23.2%
$7,500 - $9,999	416	18.3%	348	11.8%	255	8.8%
$10,000 - $14,999	348	15.3%	528	17.9%	385	13.3%
$15,000 - $24,999	98	4.3%	774	26.2%	1011	34.9%
$25,000 - $34,999	0	0.0%	227	7.7%	339	11.7%
$35,000 - $49,999	0	0.0%	97	3.3%	148	5.1%
$55,000 +	9	0.4%	56	1.9%	87	3.0%
Total	2,273	100.0%	2,950	100.0%	2,897	100.0%

Note: Percent's may not add to 100% due to rounding.

Sources: Donnelly Marketing Information Services.
PLANTEC Corporation, 1986.

Appendix Table B-1. Primary Criteria Used in Determining Where to Shop for Specific Consumer Goods

Criteria	Distance From Home		Price		Variety		Quality	
	Number	Percent	Number	Percent	Number	Percent	Number	Percent
Categories								
Food	108	30.9%	124	35.5%	21	6.0%	96	27.5%
Drugs	127	37.1	130	38.0	27	7.9	58	17.0
Clothing	48	14.0	145	42.3	35	10.2	115	33.5
Hardware	38	13.8	153	55.4	23	8.3	62	22.5
Automotive	35	13.8	149	58.9	12	4.7	57	22.5
Appliance/Radio/TV	25	8.5	156	53.2	9	3.1	103	35.2
Furniture	20	7.4	146	54.3	1	0.4	102	37.9

Sources: Household Survey of Gainesville Study Area, 1986.
PLANTEC Corporation, 1986.

Appendix Table B-2. Travel Distance From Home to Shopping Center by Automobile

Shopping Center	Thriftway		K-Mart Winn Dixie		IGA		Gainesville Shopping Center		Total	
Travel Distance (Minutes)	Number	Percent	Number	Percent	Number	Percent	Number	Percent	Number	Percent
>2	4	5.3%	2	2.7%	16	20.8%	7	9.9%	29	9.7%
2 to 5	44	57.9	6	8.1	23	29.9	25	35.2	98	32.9
6 to 10	14	18.4	25	33.8	10	13.0	19	26.8	68	22.8
>10	14	18.4	41	55.4	28	36.4	20	28.2	103	34.6
	====	====	====	====	====	====	====	====	====	====
	76	100.0%	74	100.0%	77	100.0%	71	100.0%	298	100.0%

Note: Totals may not sum to 100 percent due to rounding.

Sources: Consumer Survey for the Gainesville Study Area, 1986.
PLANTEC Corporation, 1986.

Appendix Table B-3. Shopping Patterns for Individuals Residing in the Districts

Districts	1 & 2		3,4 & 6		7		9 & 10		8 & 11		12		13		5		Study Area	
Category	#	%	#	%	#	%	#	%	#	%	#	%	#	%	#	%	#	%
Food:																		
Study Area	1	2	4	5.9	12	35.3	22	51.2	48	84.2	26	59.1	47	57.3	1	1.4	161	35.9
North of Study Area	0	0	2	2.9	0	0	0	0	0	0	0	0	0	0	0	0	2	0.4
Downtown	0	0	0	0	0	0	2	4.7	0	0	0	0	0	0	1	1.4	3	0.7
N. Main	48	98	57	83.8	5	14.7	3	7	7	12.3	9	20.5	35	42.7	30	42.3	194	43.3
S. Main	0	0	1	1.5	12	35.3	12	27.9	0	0	1	2.3	0	0	0	0	26	5.8
N.W. 13th/HGWY 441	0	0	4	5.9	2	5.9	4	9.3	2	3.5	8	18.2	0	0	2	2.8	22	4.9
Oaks Mall	0	0	0	0	1	2.9	0	0	0	0	0	0	0	0	37	52.1	38	8.5
Other	0	0	0	0	2	5.9	0	0	0	0	0	0	0	0	0	0	2	0.4
Total	49	100	68	100	34	100	43	100	57	100	44	100	82	100	71	100	448	100
Drugs:																		
Study Area	12	25.5	1	2.9	4	18.2	0	0	0	0	0	0	0	0	0	0	17	6.9
North of Study Area	3	6.4	7	20	3	13.6	1	2.9	6	16.7	8	57.1	6	60	2	4.3	36	14.7
Downtown	10	21.3	11	31.4	7	31.8	2	5.7	4	11.1	3	21.4	0	0	1	2.2	38	15.5
N. Main	14	29.8	6	17.1	2	9.1	3	8.6	5	13.9	2	14.3	2	20	39	84.8	73	29.8
S. Main	0	0	5	14.3	0	0	25	71.4	16	44.4	0	0	0	0	0	0	46	18.8
N.W. 13th/HGWY 441	6	12.8	3	8.6	2	9.1	3	8.6	3	8.3	1	7.1	1	10	2	4.3	21	8.6
Oaks Mall	2	4.3	2	5.7	4	18.2	0	0	2	5.6	0	0	0	0	2	4.3	12	4.9
Other	0	0	0	0	0	0	1	2.9	0	0	0	0	1	10	0	0	2	0.8
Total	47	100.1	35	100	22	100	35	100	36	100	14	100	10	100	46	100	245	100
Clothing:																		
Study Area	0	0	0	0	0	0	0	0	0	0	3	8.8	0	0	1	1.4	4	1.1
North of Study Area	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Downtown	2	3.9	3	6	2	8	1	2.9	2	4.3	0	0	0	0	1	1.4	11	3.1
N. Main	19	37.3	19	38	5	20	7	20.6	13	27.7	8	23.5	7	14.9	30	42.3	108	30.1
S. Main	0	0	0	0	4	16	7	20.6	4	8.5	1	2.9	1	2.1	0	0	17	4.7
N.W. 13th/HGWY 441	9	17.6	5	10	5	20	3	8.8	10	21.3	6	17.6	2	4.3	2	2.8	42	11.7
Oaks Mall	21	41.2	23	46	9	36	16	47.1	18	38.3	16	47.1	37	78.7	37	52.1	177	49.3
Other	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Total	51	100	50	100	25	100	34	100	47	100	34	100	47	100	71	100	359	100

Appendix Table B-3. Shopping Patterns for Individuals Residing in the Districts (Continued)

Districts	1 & 2		3,4 & 6		7		9 & 10		8 & 11		12		13		5		Study Area	
Category	#	%	#	%	#	%	#	%	#	%	#	%	#	%	#	%	#	%
Hardware:																		
Study Area	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
North of Study Area	15	31.9	8	22.9	7	31.8	1	2.9	6	16.7	8	53.3	6	60	2	4.3	53	21.5
Downtown	10	21.3	11	31.4	7	31.8	2	5.7	4	11.1	3	20	0	0	1	2.2	38	15.4
N. Main	14	29.8	6	17.1	2	9.1	3	8.6	5	13.9	2	13.3	2	20	39	84.8	73	29.7
S. Main	0	0	5	14.3	0	0	25	71.4	16	44.4	0	0	0	0	0	0	46	18.7
N.W. 13th/HGWY 441	6	12.8	3	8.6	2	9.1	4	11.4	3	8.3	1	6.7	1	10	2	4.3	22	8.9
Oaks Mall	2	4.3	2	5.7	4	18.2	0	0	2	5.6	0	0	0	0	2	4.3	12	4.9
Other	0	0	0	0	0	0	0	0	0	0	1	6.7	1	10	0	0	2	0.8
Total	47	100	35	100	22	100	35	100	36	100	15	100	10	100	46	100	246	100
Automobile:																		
Study Area	2	5	10	25.6	2	9.1	1	3.4	4	12.9	7	43.8	2	16.7	3	8.6	31	13.8
North of Study Area	0	0	2	5.1	0	0	0	0	0	0	1	6.3	2	16.7	1	2.9	6	2.7
Downtown	0	0	0	0	0	0	0	0	1	3.2	0	0	1	8.3	0	0	2	0.9
N. Main	27	67.5	17	43.6	9	40.9	8	27.6	7	22.6	5	31.3	3	25	30	85.7	106	47.3
S. Main	2	5	3	7.7	2	9.1	18	62.1	14	45.2	1	6.3	2	16.7	0	0	42	18.8
N.W. 13th/HGWY 441	7	17.5	5	12.8	3	13.6	1	3.4	3	9.7	0	0	1	8.3	1	2.9	21	9.4
Oaks Mall	0	0	2	5.1	6	27.3	1	3.4	2	6.5	1	6.3	0	0	0	0	12	5.4
Other	2	5	0	0	0	0	0	0	0	0	1	6.3	1	8.3	0	0	4	1.8
Total	40	100	39	100	22	100	29	100	31	100	16	100	12	100	35	100	224	100

Appendix Table B-3. Shopping Patterns for Individuals Residing in the Districts (Continued)

Districts	1 & 2		3,4 & 6		7		9 & 10		8 & 11		12		13		5		Study Area	
Category	#	%	#	%	#	%	#	%	#	%	#	%	#	%	#	%	#	%
Appliances:																		
Study Area	7	12.7	3	7.7	0	0	1	5.9	0	0	1	3.7	0	0	1	4.2	13	5.9
North of Study Area	2	3.6	1	2.6	3	12	1	5.9	0	0	2	7.4	2	16.7	2	8.3	13	5.9
Downtown	2	3.6	0	0	0	0	1	5.9	3	13.6	0	0	1	8.3	1	4.2	8	3.6
N. Main	25	45.5	23	59	17	77.3	11	64.7	13	59.1	10	37	3	25	15	62.5	117	52.9
S. Main	0	0	3	7.7	0	0	1	5.9	0	0	2	7.4	1	8.3	0	0	7	3.2
N.W. 13th/HGWY 441	6	10.9	5	12.8	3	13.6	0	0	2	9.1	6	22.2	2	16.7	1	4.2	25	11.3
Oaks Mall	11	20	4	10.3	2	9.1	2	11.8	0	0	6	22.2	3	25	3	12.5	31	14
Other	2	3.6	0	0	0	0	0	0	4	18.2	0	0	0	0	1	4.2	7	3.2
Total	55	100	39	100	25	113.6	17	100	22	100	27	100	12	100	24	100	221	100
Furniture:																		
Study Area	0	0	0	0	4	16.7	0	0	0	0	0	0	0	0	1	4.3	5	2.3
North of Study Area	1	3.1	1	12.5	0	0	2	16.7	0	0	0	0	0	0	0	0	4	1.8
Downtown	12	37.5	1	12.5	0	0	1	8.3	2	9.1	0	0	2	22.2	3	13	21	9.5
N. Main	12	37.5	3	37.5	14	58.3	8	66.7	12	54.5	3	23.1	2	22.2	10	43.5	64	29
S. Main	0	0	0	0	0	0	1	8.3	0	0	1	7.7	0	0	0	0	2	0.9
N.W. 13th/HGWY 441	3	9.4	1	12.5	3	12.5	0	0	4	18.2	8	61.5	5	55.6	9	39.1	33	14.9
Oaks Mall	4	12.5	1	12.5	2	8.3	0	0	0	0	1	7.7	0	0	0	0	8	3.6
Other	0	0	1	12.5	1	4.2	0	0	4	18.2	0	0	0	0	0	0	6	2.7
Total	32	100	8	100	24	100	12	100	22	100	13	100	9	100	23	100	143	64.7

Sources: Household Survey of Gainesville Study Area, 1986.
PLANTEC Corporation, 1986.

Appendix Table B-4. Demand for Specific Retail Stores and Services

Districts	1 & 2	3,4 & 6	7	9 & 10	8 & 11	12	13	5	Study Area
Demand for Retail Stores									
Hardware	4	3	1	0	2	3	2	2	17
Clothing	7	2	4	1	16	6	0	22	58
Liquor	1	0	0	0	0	0	0	0	1
Department	9	1	0	1	2	1	1	3	18
Convenience	2	3	6	1	2	0	4	0	18
Pharmacy	1	1	3	1	11	3	4	25	49
Grocery	6	11	20	26	35	8	0	50	156
Meat	0	1	3	1	1	0	0	2	8
Shoes	1	1	2	2	2	2	1	13	24
Discount	0	0	2	1	2	15	8	11	39
Auto Parts	0	1	7	0	0	1	1	1	11
Variety	0	0	0	0	0	0	0	15	15
Total	31	24	48	34	73	39	21	144	414
Demand for Services									
Fast Food Restaurant	2	0	2	4	8	4	0	5	25
Full Service Restaurant	5	5	0	5	7	6	3	5	36
Laundry Mat	1	14	15	1	9	1	2	9	52
Physician	3	2	6	4	15	1	7	7	45
Dentist	1	0	0	0	2	1	2	0	6
Service Station	0	0	0	1	12	0	0	8	21
Beauty/Barber	0	1	9	1	9	2	0	0	22
Total	12	22	32	16	62	15	14	34	207

Sources: Household Survey of Gainesville Study Area, 1986.
PLANTEC Corporation, 1986.

Appendix Table B-5. Where Population in the Districts Shop for Selected Personal Services

Districts	1 & 2		3,4 & 6		7		9 & 10		8 & 11		12		13		5		Study Area	
Category	#	%	#	%	#	%	#	%	#	%	#	%	#	%	#	%	#	%
Beauty/Barber:																		
Northwest	18	64.3	21	48.8	14	58.3	12	75.0	5	25.0	6	31.6	7	53.8	11	25.0	94	45.4
Southwest	6	21.4	12	27.9	1	4.2	2	12.5	5	25.0	1	5.3	2	15.4	0	0.0	29	14.0
Northeast	0	0.0	10	23.3	0	0.0	1	6.3	9	45.0	8	42.1	2	15.4	22	50.0	52	25.1
Southeast	0	0.0	0	0.0	9	37.5	1	6.3	1	5.0	3	15.8	2	15.4	2	4.5	18	8.7
Downtown	4	14.3	0	0.0	0	0.0	0	0.0	0	0.0	1	5.3	0	0.0	9	20.5	14	6.8
Total	28	100.0	43	100.0	24	100.0	16	100.0	20	100.0	19	100.0	13	100.0	44	100.0	207	100.0
Laundry:																		
Northwest	18	56.3	13	29.5	11	68.8	3	15.0	4	30.8	7	29.2	1	5.3	12	41.4	69	35.0
Southwest	4	12.5	5	11.4	0	0.0	8	40.0	2	15.4	7	29.2	4	21.1	2	6.9	32	16.2
Northeast	9	28.1	26	59.1	0	0.0	5	25.0	6	46.2	4	16.7	0	0.0	14	48.3	64	32.5
Southeast	1	3.1	0	0.0	5	31.3	4	20.0	1	7.7	5	20.8	14	73.7	0	0.0	30	15.2
Downtown	0	0.0	0	0.0	0	0.0	0	0.0	0	0.0	1	4.2	0	0.0	1	3.4	2	1.0
Total	32	100.0	44	100.0	16	100.0	20	100.0	13	100.0	24	100.0	19	100.0	29	100.0	197	100.0
Medical:																		
Northwest	6	25.0	13	32.5	0	0.0	2	6.5	13	56.5	7	24.1	2	14.3	10	18.2	53	22.2
Southwest	12	50.0	22	55.0	14	60.9	28	90.3	1	4.3	17	58.6	11	78.6	43	78.2	148	61.9
Northeast	6	25.0	3	7.5	0	0.0	0	0.0	2	8.7	1	3.4	1	7.1	1	1.8	14	5.9
Southeast	0	0.0	1	2.5	1	4.3	0	0.0	7	30.4	4	13.8	0	0.0	0	0.0	13	5.4
Downtown	0	0.0	1	2.5	8	34.8	1	3.2	0	0.0	0	0.0	0	0.0	1	1.8	11	4.6
Total	24	100.0	40	100.0	23	100.0	31	100.0	23	100.0	29	100.0	14	100.0	55	100.0	239	100.0
Auto Repair:																		
Northwest	17	53.1	10	55.6	11	68.8	5	41.7	7	38.9	9	64.3	6	35.3	10	58.8	75	52.1
Southwest	3	9.4	0	0.0	0	0.0	0	0.0	1	5.6	1	7.1	1	5.9	2	11.8	8	5.6
Northeast	11	34.4	5	27.8	0	0.0	4	33.3	5	27.8	1	7.1	1	5.9	4	23.5	31	21.5
Southeast	0	0.0	3	16.7	5	31.3	3	25.0	5	27.8	3	21.4	0	0.0	1	5.9	20	13.9
Downtown	1	3.1	0	0.0	0	0.0	0	0.0	0	0.0	0	0.0	9	52.9	0	0.0	10	6.9
	32	100.0	18	100.0	16	100.0	12	100.0	18	100.0	14	100.0	17	100.0	17	100.0	144	100.0
Banking:																		
Northwest	19	42.2	17	35.4	16	76.2	0	0.0	6	23.1	9	32.1	5	33.3	6	16.7	78	34.5
Southwest	0	0.0	7	14.6	0	0.0	1	14.3	3	11.5	0	0.0	1	6.7	1	2.8	13	5.8
Northeast	3	6.7	3	6.3	0	0.0	0	0.0	0	0.0	0	0.0	0	0.0	1	2.8	7	3.1
Southeast	0	0.0	1	2.1	0	0.0	0	0.0	0	0.0	8	28.6	0	0.0	1	2.8	10	4.4
Downtown	23	51.1	20	41.7	5	23.8	6	85.7	17	65.4	11	39.3	9	60.0	27	75.0	118	52.2
Total	45	100.0	48	100.0	21	100.0	7	100.0	26	100.0	28	100.0	15	100.0	36	100.0	226	100.0

Sources: Household Survey of Gainesville Study Area, 1986.
PLANTEC Corporation, 1986.