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Community Insights™

JGSCGroup

MARKET ANALYSIS AND
STRATEGIC RECOMMENDATIONS

FEBRUARY, 2013

Report On

Community Insights™ Market Analysis and Retail Assessment

Of Springfield Township, New Jersey

Conducted on Behalf Of

Springfield Community Partnership Management Corp.

February 2013

JGSC
Group

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Executive Summary

In February 2012, JGSC Group began a market analysis and retail assessment of Springfield Township, at the request of the Township's Business Improvement District. During the course of our work, we conducted visual assessments of commercial properties and businesses within the district, met with local stakeholders and merchants, and conducted a consumer survey of residents and visitors via paper mailers and online. We received 942 completed survey responses—well beyond our goal of 400—resulting in a low margin of error of 3.3%. We used this data to determine the Trade Area for Springfield, and to obtain syndicated economic data for the Trade Area. Analysis of that data revealed current supply and demand for more than 140 categories of retail. We blended that data with our custom research (infrastructure observations, merchant and stakeholder interviews, local ordinance review, and consumer survey findings) in order to draw conclusions on commerce in Springfield, including which retail categories would be most sustainable for the district. This report provides our in-depth evaluation of those economic factors, as well as our recommended strategies for revitalization of local commerce.

Springfield is a well-heeled community that is surrounded by affluence. Maplewood, Westfield, Millburn, and Summit are just a few of the communities on Springfield's perimeter that, like Springfield, boast an average household income well above the average for the State of New Jersey. Springfield is host to Baltusrol, one of the most exclusive country clubs in the northeast. Just a few miles from Springfield's downtown is the Short Hills Mall, one of the most exclusive malls in the country, with upscale retailers (e.g., Tiffany, Gucci, and Prada) that do not have locations anywhere else in the State. Major highways penetrate Springfield and daily carry hundreds of thousands of commuters and visitors back and forth through Springfield to New York City. Route 22, is lined with national and regional retailers in Springfield and all the way into Newark. State route 82 (otherwise known as Morris Avenue) is another of those heavily-

trafficked highways, and it also serves as Springfield's traditional downtown and heart of its commerce. Mountain Avenue offers a third concentration of commerce in town, limited to neighborhood retail for the local residents.

Despite all of these choices, all the nearby affluent shoppers, and all of the thousands of travelers who pass through it everyday, Springfield—as a commercial district—is poorly defined. It does not have a branded identity, nor is it known as a destination for stores or restaurants. The downtown does not function as intended—as a traditional, walkable, browse-shopping destination. The major national retailers on Route 22 limit what can be done effectively on Morris Avenue, and the merchants and restaurants of Mountain Avenue are known only to the local residents.

In fact, our consumer survey disclosed that outsiders tend not to come to Springfield to shop, and Springfield residents who do shop here normally prefer to shop elsewhere. Far too much of the consumer spending of the residents of Springfield and its surrounding area is spent elsewhere.

The encouraging news is that there are measures that can be taken to improve the "capture rate" and increase the share of that spending in Springfield. Recently announced plans to redevelop the retail of downtown Morris Avenue are consistent with strategic recommendations made in this report to:

- increase the amount of total square footage of retail on Morris Avenue;
- alter the configuration of that retail space to accommodate modern retailers; and
- institute a program of retail recruitment to manage the type and quality of retail in the downtown.

Our research found large untapped consumer demand in several retail categories within Springfield and the 5-mile radius around it. For example, there is nearly $64 million in unmet demand for full-service restaurants in that radius, which is enough to support up to 40 new full-

service restaurants. We believe that Springfield could reasonably expect to capture 8 to 12 of those restaurants.

We recommend measures to allow for the Morris Avenue downtown to become a regional destination for certain shopping and dining; for the concentration of neighborhood retail (for the needs of local residents) on Mountain Avenue; for the incorporation of the northern end of Mountain Avenue into the Morris Avenue downtown area; and for the management of retail recruitment in the Route 22 corridor to enhance business there and avoid direct competition with downtown retailers.

Most important is the achievement of a retail mix that will once again attract shoppers to Morris Avenue, and a setting that will encourage them to park their cars, walk around, browse-shop, and dine when they come into Springfield. With access to more convenient parking, more walkable retail, the recruitment of a better mix of retailers and restaurants, the creation of more events to attract more visitors to Morris Avenue, and further branding/marketing to tell your story, the vision of the Springfield Township Business Improvement District shall be realized.

This report provides you with the basic research that the District will need in order to be in position to recruit the retailers and restaurateurs it needs for a redeveloped Morris Avenue, as well as an in-depth explanation of how such a recruitment program should be implemented. The redevelopment and the recruitment program are the first steps of our multi-part strategic recommendations that also focus on enhancements for the retail corridors of Mountain Avenue and Route 22. Each component will play a coordinated part in our unified strategy that anticipates well-known national and regional retailers and auto dealers will remain on Route 22, that neighborhood goods and services will be clustered on Mountain Avenue, and that a new regional destination for distinctive boutique retail shopping and a wide variety of full-service dining shall be created on Morris Avenue. Our research confirms that these are practical goals for Springfield to pursue, to take maximum advantage of its location and its many commercial

opportunities. Our strategies provide the Township and the Springfield BID with the plan of action to achieve those goals. We at JGSC Group stand ready to provide further assistance in their implementation, if desired.

Physical Analysis

Approach: Morris-downtown, Morris-beyond, Mountain, and Route 22

In making our Community Insights™ analysis of Springfield Township, we recognized that the community has four distinct areas that provide retail commerce: its traditional downtown is situated on Morris Avenue between Caldwell Place and Mountain Avenue. There is other commerce on the portions of Morris east and west of the downtown, and it differs from the downtown. We have identified this area as "Morris Avenue beyond downtown." There is neighborhood commerce found on Mountain Avenue and there are several shopping centers and auto dealers along on State Route 22. The commerce in each of these areas operates distinctly from the other three, and serves different audiences of consumers. For that reason, although some information is reported generically here with application to the entire town, our approach to this report has been to differentiate the four areas wherever necessary in our analysis, our conclusions, and our recommendations.

Access/Vehicle Traffic, Pedestrian Activity, Parking and Signage

Access/vehicle traffic:

The many limited- and unlimited-access highways, regional roadways, and heavy traffic create physical barriers and "separations". US Route 22, NJ Route 28 and Interstate 78 all bring large amounts of regional traffic through Springfield on a daily basis. More than 300,000 vehicles travel in and through Springfield daily.

Interstate 78 is a limited access highway that has Annual Average Daily Traffic (AADT) of 151,000 vehicles at the exit to NJ Route 24/Springfield Avenue. The Route 82/Route 124/Morris Avenue exit has similarly high AADT of 100,000 vehicles. (See AADT map, Page 7.) Similarly, Route 22 carries 75,000 vehicles daily, but given the nature of the retail corridor as its own entity

that is not commonly identified with Springfield, there is little likelihood that the vehicle traffic that travels here is leaving Route 22 to come deeper into Springfield for the offerings throughout the community.

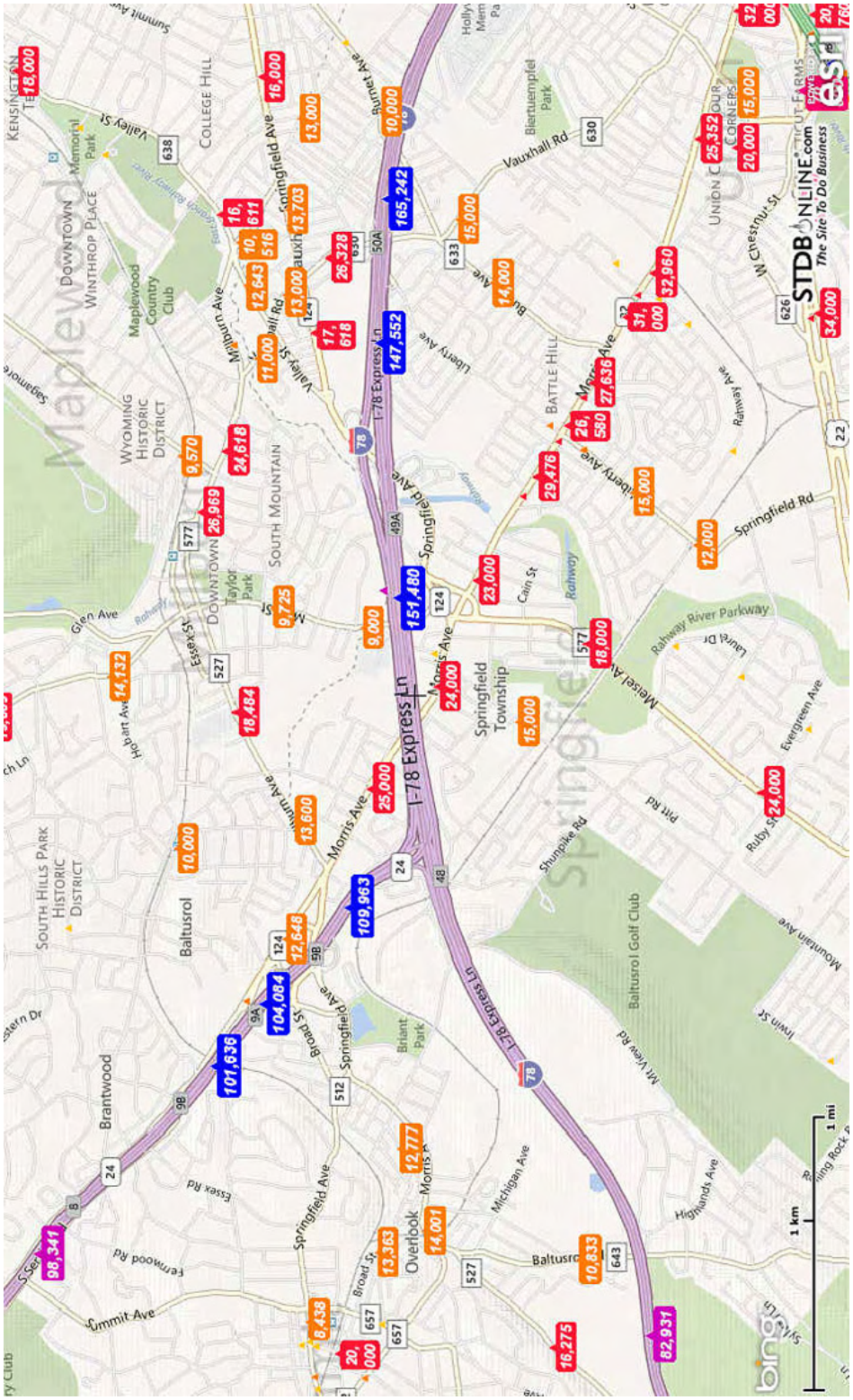
The retail corridors along Mountain Avenue and Meisel Avenue are smaller, with AADT 20,000 vehicles or less. However, to put these numbers into perspective, the typical shopping mall receives 3,400 unique vehicles daily.

These numbers indicate an opportunity to market to the consumers who travel in and through Springfield. However, evidence from survey results, merchant interviews, and our own empirical knowledge leads us to believe that little of this vehicle traffic is resulting in retail activity beyond Route 22. Further, the commercial activity being driven by the auto traffic on Route 22 doesn't benefit the other retail corridors within Springfield.

Foot Traffic on Morris Avenue – Downtown:

To gain a better understanding of the foot traffic activity and potential for browse shopping in the downtown area of Morris Avenue, JGSC Group deployed field teams to study pedestrian activity. For one hour per day over three days, field teams tracked the foot traffic on Morris Avenue. Overall, nearly 600 pedestrians were counted, with the vast majority of activity taking place near the intersection of Center Street and Morris Avenue.

At Morris and Center the average time spent on the street per pedestrian was less than two minutes. Less than half of the pedestrians tracked (42%) actually visited stores, and only 1% displayed any "browse-shopping" activity, which we defined as pedestrians visiting multiple stores.



Springfield area Annual Average Daily Traffic Counts (AADT)

At Morris and Mountain Avenues, we recorded fewer pedestrians, but they spent more time on the street (averaging five minutes) than those at Center Street and Morris Avenue. However, these pedestrians displayed even less shopping activity; the longer time spent on the street was largely attributable to them waiting for public transit busses. Bus lines that service Morris Avenue attract a large number of pedestrians, but they don't participate in retail activity. (A copy of our complete foot traffic analysis is included with this report as Appendix F.)

Parking on Morris Avenue – Downtown:

Survey results, as well as pedestrian and traffic analysis, indicate that one of the major limitations of the downtown area of Morris Avenue is the lack of public parking and the difficulty visitors have locating public parking. While there is significant off-street parking, it is mostly private and unavailable to many visitors. These private lots are typically located behind businesses and are clearly marked "for customers only" and discourage parking for the wider public. Our observations indicate that these lots are largely underutilized, and primarily service those who work on Morris Avenue, as opposed to those who shop there.

Although there is curbside parking on both sides of downtown Morris Avenue, there are a number of issues that prevent full utilization of the curbside parking. Many merchants discussed the use of curbside parking by business owners and their employees, who take advantage of the available parking for hours on end, monopolizing the most convenient spots.

Off-street public parking encourages visitors to stay longer and extends visits, which can grow sales. However, the nature of the off-street parking at Caldwell Place is counterintuitive; not every space within the lot is public parking and the kiosk payment system is difficult to operate. We observed many frustrated visitors struggling to understand the pay-for-parking system. Such frustrations can discourage future visits.

Survey results indicate that availability of parking and wayfinding signage to direct to public parking is less than ideal. While 38% of survey respondents indicated that they can "sometimes" find parking and another third indicated they can "usually" find parking. However, 20% of respondents indicated they "rarely" or "never" find parking.

Finally, although the municipality has created public parking to service the downtown area of Morris Avenue, we noticed that both the wayfinding signage directing to this parking and the actual parking lot itself are difficult to navigate. Wayfinding signage is limited or not readily visible along Morris Avenue and, for those who do find the public parking, it can be difficult to discern which spots are open to the public or how the kiosk system set up works.

Downtown Morris Avenue showing surface parking lots throughout. Of these, only a portion of the lot at the foot of Caldwell Place is a public municipal lot, and the municipality charges a fee to park there.

Gateway & Wayfinding Signage:

Gateway signs at the entranceways create a sense of "arrival" and help to create a "sense of place" for the community. They should reflect a theme, be easily viewed, and make a clear announcement that the visitor has arrived.

Gateway signage into Springfield is placed at all of the main entranceways, providing a visible welcome for people arriving in Springfield. All of the gateway signage is based around the theme of a historic Springfield, and state either "Welcome to Springfield, Site of the Forgotten Victory" or "Welcome to Historic Springfield." While these signs are fairly visible and thematic, the historical focus is not something that can be heavily capitalized upon. None of the signage provides any indication of retail shopping and dining, even though most of the gateway signs are placed at the entrances of the town's three retail corridors.

Small "gateway" sign welcomes drivers to Springfield, but offers no indication of retail shopping districts.

Moreover, the size of the signage is not particularly large, which can make it difficult to see. This is problematic in Springfield since drivers entering from Morris Avenue and Route 22 are traveling at higher speeds. Larger signage would ensure that drivers notice that they are entering Springfield regardless of their speed.

Wayfinding signage should direct visitors to important locations throughout town. These can include public parking, historic venues, or shopping districts.

There are some wayfinding signs in Springfield, but they do not guide visitors to the merchant areas. The only wayfinding signs that exist are those for the Cannonball House. As with the gateway signs, this emphasizes the historic aspect of Springfield without drawing attention to the retail offerings in town. In fact, signage for the Cannonball House draws people away from retail since it sits on the far edge of the Morris Avenue shopping area, guiding people away from the center of town. Wayfinding towards the retail areas is essential if Springfield is going to attract outside shoppers, since the speed and volume of traffic on Morris Avenue and Route 22 can make driving intimidating for people who are not familiar with the area.

Similarly, pedestrian wayfinding is lacking as well. While pedestrian-friendly retail is limited as this time, as efforts are undertaken to expand and improve retail offerings, pedestrian wayfinding can and should play an important role. Pedestrian wayfinding (similar to retail mall directories) informs and guides pedestrians to the retail offerings.

Besides retail signage, wayfinding towards parking is another important aspect that increases shopper convenience. In Springfield, there are two major municipal lots on Morris Avenue and Mountain Avenue. There are signs at the entrance to these municipal lots, but there is no signage directing shoppers to them. Again, this is essential for unfamiliar shoppers that could easily miss the parking lots on Springfield's busy roads. Signs that provide more direction towards public parking could help to alleviate this problem.

Building and Business Evaluations

Morris Avenue "Downtown" Retail Infrastructure:

Morris Avenue, between Mountain and Caldwell Avenues, is the retail corridor that most resembles a traditional downtown setting, although several obstacles limit its appeal as a browse-shopping environment.

KEY FINDINGS

- Buildings are fatigued and poorly maintained.
- Heavy automobile traffic discourages browse shopping.
- Wide street and narrow sidewalks discourage pedestrian activity.
- Infrastructure limits retail opportunities.

Morris Avenue is wide—45 to 50 feet—which permits heavy vehicular traffic and serves as a psychological "barrier" to pedestrian shoppers. Additionally, the sidewalks are less than 10 feet wide, further discouraging pedestrian activity and limiting space for pedestrian amenities.

Downtown Morris Avenue

There are few such pedestrian amenities along the sidewalk and little greenery or other streetscaping efforts. What trees are present are incompatible with a downtown retail setting with foliage at a height that blocks band, blade and awning signage.

However, on-street parking combined with building heights of two to three stories create a sense of enclosure that is desirable in a downtown retail setting. On-street parking serves to insulate pedestrians from automotive traffic, while building heights create a consistent "streetwall" that provides a sense of an enclosed place.

The older buildings are not designed to accommodate modern retail needs. Storefronts along Morris Avenue are narrow and deep, making it difficult for retailers to merchandise their stores in an appealing way, with large storefront displays.

The "bowling alley" style of storefront is a common problem in older retail corridors, and makes it difficult to attract upscale retail tenants, which require more open floor plans and wider storefronts. Remedying this problem would require redevelopment and rehabilitation of the buildings in question to accommodate more modern retailing strategies.

Downtown Morris Avenue

Another limitation present here is that the area that could properly be labeled as "downtown" is very small. Only this two-block area has the characteristics and features common to a walkable downtown shopping district and it is capped on either end by one-story retail structures, set back from the curb line and fronted by surface parking. To make downtown, the corridor needs to be expanded along Morris, down side streets such as Caldwell Place and along Mountain Avenue.

One of the features of the downtown area is the amount of above-grade space available in the downtown area. Much of the building stock is multistory, at least two stories and occasionally three stories. However, it was difficult for us to determine the quality or use of this space. Should this area be redeveloped, our recommendation would be to include and even expand the above-grade space in the downtown and create space for market-rate residential rentals and condos.

Morris Avenue "Beyond Downtown" Retail Infrastructure:

Beyond what we've labeled the downtown area of Morris Avenue, there is little uniformity of retail infrastructure or mix. Commercial properties are limited and isolated, and this is even truer of retail properties. Here, automotive traffic dominates and pedestrian activity is sparse, retail offerings are housed in freestanding structures, surrounded by parking.

KEY FINDINGS
- Retail is primarily auto-oriented.
- Pedestrian access is very limited.
- Office, retail, and residential spaces are present.
- There is no cluster of retail offerings.

Multistory office buildings dot the landscape, with their own attendant surface parking. These buildings vary both in height and age fairly greatly; they tend to be modern in style and the larger buildings reach as tall as four stories.

Mountain Avenue Retail Infrastructure:

Mountain Avenue is greatly varied in the type of commercial properties present, but their most common feature is that commercial and retail space here is overwhelmingly auto-oriented. Given the relatively heavy traffic on the two-lane feeder road (roughly 15,000 vehicles per day), it's unsurprising that the retail and commercial offerings here are auto-oriented.

KEY FINDINGS
- Commercial office, retail, and residential spaces are present
- The infrastructure ensures auto-oriented retail.
- Retail is clustered as "islands" in residential corridor.
- Opportunity to connect to "downtown" Morris Avenue

Clusters of retail and commercial office space exist as islands breaking up the residential corridor. These clusters are entirely auto-oriented and retail spaces are typically set back from the curbside with parking located in front of the storefronts. All of the retail offerings are located in one-story buildings; however, some commercial office space is located in multistory units.

Retail and commercial offerings are clustered around the following intersections:

- Caldwell Place and Mountain Avenue – Along the west side of Mountain, across the street from the Jonathan Dayton High School are a number of office buildings and a retail bank location.
- South of Caldwell Place – A number of residential houses converted into commercial office space.
- Between Tooker Avenue and south of Oakland Avenue – The largest cluster of commercial and retail properties on Mountain Avenue lies between Trivett Avenue and a point just south of Henshaw Avenue/Oakland Avenue. The area is comprised of medical facilities, office buildings, banks, insurance companies, the post office, the fire department complex, two eateries, a gas station, and two small retail stores. It is not a browse-shoppable area. Retail storefronts cluster in strip-mall style, with parking either in the front or rear of the buildings. Although rear parking gives the appearance of pedestrian-friendliness, in this corridor we observed little pedestrian activity.
- South of the intersection of Mountain Avenue and Hillside Avenue – Here is another large cluster of primarily retail space, with some commercial office space mixed in. Again, these retail spaces are primarily strip-mall settings, with dedicated off-street parking for the retail businesses. This cluster ends near the intersection with Edgewood Avenue.

Cioffi's Deli, a popular local destination on Mountain Avenue, south of Hillside Avenue.

- Near Gregory Road and Mountain Avenue: Echo Plaza – This is a shopping center of about 67,000 SF of retail space and an adjacent Echo Executive Plaza Office Building, a three-story complex with over 41,000 SF of office space. We notes that Echo Plaza is also accessed by Route 22 and has a mix of both regional retail destinations (No Body Denied Fitness; Outback Steakhouse; Sherwin Williams Paints; Stew Leonard's Wines & Spirits) and local neighborhood businesses (Echo Cleaners; Bangles Hair Salon).

Outside of these islands of commercial activity, the corridor is made up primarily of single-family, detached residential housing. Near the municipal building is a large, multi-unit apartment complex of several buildings, including townhouse style buildings.

The municipal complex includes the municipal building, a public green, an annex building, a Public Works Department building, and a large public parking lot. Nearby is a NJ Motor Vehicle Agency that attracts regional visitors into town. The Public Works buildings could be relocated to a more appropriate setting, such as in an industrial area, to free up space for retail development. Farther north is where the retail offerings of Morris Avenue begin to continue onto Mountain and represent an opportunity to connect the two corridors and create public space near the riverfront.

Springfield Municipal Building

Dept. of Public Works building on Mountain Ave. near Morris Ave.

Route 22 Corridor:

Route 22 is a regional retail corridor that runs not just through Springfield, but through neighboring Mountainside and into Union, as well. With few exceptions, the retail offerings in both directions as well as in the wide median are housed in large shopping centers and pad sites created for national chain tenants.

KEY FINDINGS

- Dominated by large footprint development.
- Mostly built-out with little opportunity for further development.
- Entirely auto-oriented.
- Part of a regional retail corridor more than part of Springfield's retail offerings.

The shopping centers are a mixture of ages, from very new to thirty to forty years old. Some retail space has gone dark over time, leaving behind large-scale vacancies that are difficult to fill and many property owners have reduced investment on maintenance and upkeep of their properties. Older properties along the corridor are beginning to show their age, appearing fatigued and rundown.

Auto-oriented retail along Route 22

In contrast, newer shopping centers benefit from new construction and a high level of maintenance, making it easier for them to attract both customers and tenants. Newer signage, better lighting, and more available parking are all more common in any of the newer locations.

Pad sites are common along the wide median and, as with all other retail infrastructure, they are entirely auto-oriented, with multiple entrance points from either direction of the highway and ample parking. These sites are commonly built to suit and, although some older examples exist, the retail pad sites within the median are mostly newer, freestanding, single-tenant retail space.

Competition

One of the key challenges to attracting more consumer spending in Springfield is the quantity and quality of retail offerings throughout the area. Within close proximity to Springfield are two regional shopping malls—the Mall at Short Hills and Livingston Mall—as well as Route 22's shopping centers and downtown Westfield (selected by survey respondents as their favorite place to shop or dine).

> **CHALLENGES**
> - Multiple regional shopping destinations in the area.
> - Luxury goods and name-brand offerings nearby.
> - Moderate as well as discount offerings are present.
> - Highly competitive regional retail market.

These retail offerings cover a wide range of categories, including high-end luxury brand names, discount offerings, national retail chains, and unique, independent boutique retailers. Here is an overview of these areas, their features, and their offerings.

The Mall at Short Hills

This mall is a well-known regional shopping destination for consumers of high-end luxury brands. Its main point of differentiation is the exclusivity of offerings. Available here are such luxury brands as Armani, Cartier, Chanel, Dior, Gucci, Prada, and Tiffany.

These luxury offerings are consistent with the retail tastes and preferences of the consumer audience in the region. High incomes, wealth, and spending are common in these bedroom communities of New York City. The national cache and name brand appeal are very difficult to compete with.

With over 1.4 million square feet of retail, the Mall at Short Hills attracts shoppers from throughout the region and captures a large amount of the spending within the categories they offered. The retail categories are focused on clothing-related goods, but also include full- and

limited-service restaurants such as The Cheesecake Factory, Legal Seafood, Starbucks, and Qdoba Mexican Grill.

Livingston Mall

While the retail categories offered by both the Mall at Short Hills and Livingston Mall are similar, their price points and targeted consumers are very different. While the Mall at Short Hills is focused on providing high quality, luxury brand names, Livingston Malls is focused on a more moderate price point and consumer.

Anchored by department stores that range from Lord & Taylor's to Sears, the clothing-related retail offerings include The Gap, H&M, and Hot Topic. Generally, these stores attract a more middle class consumer than those who shop at the Mall at Short Hills, although some overlap exists.

There is significantly less total retail space at the Livingston Mall than the massive Mall at Short Hills. With nearly one million square feet of retail, though, the Livingston Mall is quite sizeable. Most of the eatery offerings focus on limited-service, typically fast food. But for Giulietta & Romeo Pizzeria there are no full-service restaurant offerings here.

Route 22 in Union

As previously discussed, Route 22 is unlikely to be considered part of the retail offerings of Springfield and far more likely to be considered as one contiguous retail corridor that stretches through multiple communities. The retail offerings along Route 22 in Union, therefore, need to be examined to understand area competition.

The primary source of competition along this corridor is the big-box retail located here. Walmart and Target both have locations here, and offer a wide-range of categories that clothing, grocery,

appliances, electronics, music, books, and DVDs. Best Buy also is located here, servicing additional electronics-related categories with additional depth and price points.

A variety of retail strip centers in-fill between the above-named big-box retailers. We don't possess a comprehensive list of all retail categories offered, but noteworthy offerings include liquor sales, party supplies, baby clothing, and furniture. The quality of goods offered in smaller retail stores varies greatly, from discount to luxury.

Straddling the borders along Route 22 is a regional destination for new car sales and service, with huge auto dealerships in both Union and Springfield. Again, the price-points vary from luxury to affordable.

On Route 22 in Mountainside is an AMC Lowes multiplex, with over ten screens. This regional entertainment destination likely captures a significant amount of entertainment spending from Springfield and throughout the region.

Downtown Westfield, NJ

Since survey respondents selected Westfield as their favorite shopping destination in the region, we also examined the retail offerings there. We found boutiques offering clothing, shoes, crafts, and consignment merchandise. According to Westfield Today website[1], a promotional web page operated by the Westfield Main Street group, there are over one hundred retail offerings that reflect a mix of independent local retailers and national chains.

While some of the retail, such as PNC Bank and Walgreens, are unlikely to attract shoppers from beyond the local residential community, many are unique and offer specialty goods and clothing as a counterpoint to the offerings at area malls and shopping centers.

[1] http://www.westfieldtoday.com/

Design Standard

Commercial design is an important factor in the success of retail stores as well as the success of the larger retail district. Just as each façade serves as a billboard for the business it serves, the appearance of each retail corridor conveys a message regarding the nature and quality of the shopping and dining that may be expected there. An important device for the management of this aspect of district promotion is the design standard, which, set forth in ordinance, creates a set of enforceable parameters that commercial properties must follow with regard to the appearance of their facades and signage. Design harmony contributes to the sense that a shopping district is a unified whole—a distinct location designed in all particulars to attract and accommodate the shopping/dining visitor.

We reviewed Springfield's land use ordinance, and determined that while there is a design standard in place for buildings and signage (not just for commercial zones, but for all zones in the township), that standard is not as prescriptive as it could be in order to better achieve the Township's commercial goals.

Specifically, the design standard for buildings is found at Chapter 35-30 "Architectural Design Standards." The only reference to buildings in commercial zones is found at §35-30.3 g: "New facades in the O, N-C, and G-C zones shall be of traditional design and appearance." The use of the term "traditional" suggests that there is an architectural style that has traditionally been present in that zone, and that should be continued. In practice, we find that there are multiple styles in use in each of these zones; there is no single clear style that suggests itself as the traditional one.

In the following section, the ordinance addresses building materials, and holds that the use of "… brick, stone, clapboard, shakes and other facade materials consistent with traditional architectural styles shall be required…" (§35-30.4c). This limitation of building materials will provide a measure of design harmony, but it still remains that a building with a brick façade may be built in

the colonial federalist style, Greek revival style, Victorian style, modern, or any of several other varieties of style.

We recommend that the Township government, zoning board and the board of directors of the BID consider the value of amended Chapter 35-30 to include a more specific design standard for your commercial districts; in fact, that each zone be considered for unique treatment that suits its commercial needs. For example, we note that the highway-commercial zone is not reference in either §35-30.3 or .4, above—deliberately so, in view of the needs of the major national and regional franchise retail businesses that insist on projecting their branded appearance in their facades and signage. Similarly, the neighborhood-commercial area of Mountain Avenue should have a harmonious treatment that is consistent with neighborhood retail, while the general-commercial area on Morris Avenue could have a distinct appearance that would be consistent with the destination retailers and restaurants we believe ought to be located there.

If action is taken to amend the Design Standard, effort should also be applied to the Sign Standard (Chapter 35-31). Currently, the sign ordinance does not address a sign type that JGSC Group considers to be a staple of the successful traditional, walkable retail district: the projecting, or "blade" sign. By their omission, they are neither recommended nor prohibited; however, as commercial properties are limited to just one exterior-mounted wall sign, it is likely that merchants will opt for that sign to be a flush-mounted sign in the sign-band (above the display window) of the store, rather than a blade sign. Stores in the neighborhood and general-commercial zones should be permitted both.

We can recommend the other restrictions currently present in the ordinance (restrictions in the area and height of wall signs, and in the area of window and door signs); however we do recommend additional text in the ordinance to make plain that acceptable window and door signs must not impede the transparency of the door or window in a way that substantially restricts or even blocks the view of a pedestrian into the store, or the view to the street of a person inside the

store. This is both a security measure and a helpful key to better retailing. Browse shoppers will feel more inclined to enter a store with which they are unfamiliar if they are able to see well inside the store.

Finally, we note that there is a reference to a "Design Review Committee" in §4-23.3 regarding the permitting of outdoor cafés. We could find no other role for this committee in the municipal ordinances; nor further information of the committee's composition or powers. However, in view that there is precedent for this committee, we recommend that it be considered for review of commercial facades and signs proposed within the commercial zones. Such a committee, comprised of merchants and commercial property owners (possibly members of the BID Board) could be charged with ensuring design harmony for each district, and have the power merely to recommend authorization (or revision or denial) to the governing body based upon consistency with principles of design harmony and retail visual merchandising.

Public Space

Public space within a walkable downtown district is important to support the social aspect of the community, which contributes to better business. We observed inadequate public space along Morris Avenue, and only limited public space along Mountain Avenue to support outdoor public gatherings or to act as a place for people to meet. As a result, events like the Farmers' Market must be conducted at Dayton High School, away from the commercial center on Morris Avenue. Whenever events are held away from the commercial center, they not only fail to contribute to retail trade in your downtown, they draw visitors away from the downtown who might otherwise shop there.

There is common understanding among the Springfield's stakeholders—and our own foot traffic analysis disclosed—that there is insufficient foot traffic to sustain business on downtown Morris Avenue, and an effort is needed to get more of the people who drive through the district to take note of it and be enticed to stop. The creation of a public gathering space on or near the downtown would be very helpful in changing this. We recommend that public gathering space—a green square—be included in redevelopment planning for Morris Avenue. In this way, the downtown merchants will be better able to gain exposure and sales to event visitors.

The type of public gathering space no missing on downtown Morris Avenue

Retail Mix

Morris Avenue "Downtown" Retail Mix

The retail mix along Morris Avenue reflects, to some extent, both the downtown nature of the retail infrastructure and the limitations present therein. During the study, JGSC Group catalogued 50 retail storefronts within the two block downtown area and the shopping center at the intersection of Mountain and Morris Avenue. Of those, 10 percent stood vacant.

KEY FINDINGS

- Mix in an ineffective cluster of retail offerings.
- No anchor retail or sense of identity among offerings.
- Offerings are generally low quality.
- Restaurant offerings present an opportunity.
- Potential for wedding-related retail destination.

Nearly a quarter of the businesses in occupied spaces fall into the category of beauty-related (hair and nail salons, tanning salons, barbers, and beauty supplies). Another quarter was eating places, including both and full- and limited-service eateries.

The presence of so many similar offerings within the category of beauty-related retail both reflects and reinforces the inability of the retail mix to attract a broad audience. Often property owners within a stagnant shopping district accept any potential tenant, and don't pre-qualify prospective tenants on the basis of retail category, businesses plan, credit worthiness, or retail experience. In our experience, beauty and nail salons tend to typify this sort of atmosphere.

Downtown Morris Avenue

On the other hand, clustered eateries can form the basis for a unique destination that attracts a regional audience. The restaurant offerings at the time of the analysis could begin to form the basis of such a destination, if supplemented with both higher end offerings and broader variety of categories, such as other ethnic-based restaurants (Mexican, Italian, German, Thai, etc.), drinking places, and limited-service eateries.

This is not to say that what was observed is inadequate in variety or quality; however, a greater number of offerings, as well as marketing and promotion is needed to reach critical mass. Again, redevelopment of infrastructure and long-term recruitment efforts would be needed to reach such a goal.

Other retail offerings observed in the Morris Avenue downtown area are what would be labeled as "neighborhood convenience". These are retail businesses that favor quick-stop shopping at convenience stores, liquor stores, and the hardware store, and support the shopping needs of the residential population in the immediate area. They don't attract visitors from beyond the nearby neighborhoods.

Finally, we discovered that at the corner of Mountain and Morris Avenue exists a wedding and bridal destination, which includes wedding planning, wedding and event photography, bridal make-up and hair, and formalwear. With so many wedding-related services located in one place, a destination for wedding events may already exist, or could be capitalized upon to create a unique destination. Though technically on Mountain Avenue, this area is close enough to be considered part of the walkable area of Morris Avenue.

In addition to these retail offerings, we observed a number of medical services offices within the downtown area, including the Zuber dental building near the intersection of Morris Avenue and Center Street, which has the majority of the corridor's vacant retail space at grade. These uses are generally inappropriate for at-grade retail space, despite their ability to attract visitors from a larger area than neighborhood retail offerings. We would recommend relocating such office-uses to above-grade spaces, or to other vacant office spaces.

There are substantial challenges posed to the creation of a successful downtown shopping district within Morris Avenue's current retail infrastructure. There is inadequate square footage of retail space here to host a sufficient number of stores to create a shopping destination. The building stock is not conducive to modern retail needs: it is narrow and deep, rather than broad and highly visible.

KEY CHALLENGES

- Small downtown area.
- Heavy automobile traffic.
- Limited pedestrian space.
- No public gathering space.
- Lack of appealing retail mix (other than dining).
- No "street wall".

Browse shopping is in this corridor is a problem. Sidewalks are too narrow to comfortably accommodate large numbers of pedestrians; in fact, knots of people waiting for the NJ Transit buses on either side of Morris create a constant obstacle for pedestrians to navigate. There is constant, fast-moving auto traffic on Morris Avenue, and shoppers are left uncomfortably close to that traffic on the narrow sidewalks. Crosswalks are not raised or supported with bump-outs, so that crossing Morris Avenue does not feel safe and comfortable, inhibiting shopping on both sides of the Avenue. The sidewalks are too narrow to activate with café dining, pedestrian amenities, or outdoor displays of merchandise.

There is no public space for people to meet and socialize, or for public celebrations or events that can benefit the local merchants. There are few vendors of retail goods, and those that are there are in unrelated categories and cannot share customers (i.e., a hardware store and a custom dress designer). The promising note that we did find is the beginning of a dining destination with full-service Italian and Mexican restaurants, and an Irish Pub in close proximity.

Another limitation is the presence of a shopping center (set behind a large private parking lot and anchored by a supermarket) in the midst of what is supposed to be the walkable downtown. The driveways and vast parking area of this shopping center defeat the sense a walkable shopping area and comfortable "street wall effect" associated with a traditional downtown area. The one-story retail buildings in this part of Morris Avenue further compromise the street wall.

Street wall is defined by the facades that line the commercial district and give definition to the walkway.[2] To be effective, those facades should be set-back from the curbline no more than the width of the sidewalk area, and they should reach a minimum height that approximates the width of the street. Given the width of Morris Avenue (50 feet), an appropriate minimum building height would be three-stories (35 feet). Inserted below is a photo of a residential neighborhood

[2] There are a number of factors that can disrupt the street wall enclosure effect. Those disruptions include: building set-backs that extend beyond the sidewalk line; on-site parking in front of the commercial building; driveways that cross the sidewalk; drive-through features (gas stations, fast food operators, banks); windowless walls or facades; one-story buildings; and vacant lots.

on the Avenue Kleber in Paris, with residential apartments above retail stores. The photo is a good illustration of the concept of street wall and comfortable pedestrian enclosure.

Example of street wall effect along Avenue Kleber, Paris.

Space is too limited to allow enough massing of retail for the district to become a destination for shoppers—the area cannot support enough square footage of store space at grade. Perhaps in recognition of that fact, as well as in view of the need to improve under-utilized commercially-zoned land, the Township has created a redevelopment zone that includes the downtown area and extends west of Caldwell Place to the I-78 overpass. There are opportunities to recapture sites west of Caldwell Place along the south side of Morris Avenue that should be redeveloped as retail space at grade. In fact, there is also opportunity to do the same thing east of Mountain Avenue on Morris. Even the current shopping center could be considered for reconfiguration as part of a walkable downtown Morris Avenue, with storefronts built to the sidewalk, rather than as a separate shopping destination set behind its own private parking lot.

Morris Avenue "Beyond Downtown" Retail Mix

The retail mix here displays very little ability to attract a regional audience, despite the presence of national and regional chains such as TD Bank and CVS, and local draws such as the Wine Library. The variation among retail offerings and lack of clustering among the infrastructure make it difficult to create any sort of significant destination.

KEY FINDINGS

- Few retail offerings
- No clustering of retail
- Offerings include national chains
- Very high vacancy rate

The retail here is supported by the local population and oriented to service them, with a large amount of convenience retail. With the exception of the Wine Library, there's very little retail that has the ability to attract shoppers from beyond the immediate residential population, and survey results suggest many local residents choose not to shop here.

More important than the limited retail offerings is the number of professional offices present in this corridor. Of the 253 commercial properties examined, nearly 200 (almost 80 percent) are commercial offices—CPA's, attorneys, and medical services as well as a number of offices not open to the public, including government offices.

One of the office buildings along Morris Avenue

Assessing the vacancy rate of commercial office space is extremely difficult; the best measurement is would rely on occupied square footage, but given the limitations of our assessment, this information was not available to us. JGSC Group performed an informal evaluation of office space vacancy along Morris Avenue. That evaluation was inexact, as we did not have access to building interiors to identify the actual vacancy.

Rather, based on our identification of office space with vacancies posted for lease, we estimated that the vacancy rate was at least 25 percent. Jones Lang LaSalle reports that since early 2011 and continuing into the third quarter of 2012 office space vacancy in New Jersey—even for Class "A" office space—remains at 25 percent. In that regard, Morris Avenue's office vacancy level is consistent with the statewide level.

We note that the near-future outlook for growth in office occupancy is encouraging: "Some submarkets will continue to struggle while others such as the Waterfront, Route 24, **Route 78**, and Princeton should lead the way in the State's office recovery (emphasis added)."[3]

Anecdotally, we observed many office buildings within this area that appear largely, if not entirely, vacant. Given the effects of the recession, this is hardly surprising, but it does present a unique opportunity for proactive action by the BID and the township. A recruitment strategy that focuses on filling unoccupied office space could be of great assistance to commercial property owners and would have the added benefit of increasing the local workforce audience for downtown restaurants and ancillary retail.

KEY CHALLENGES

- High office vacancy
- Few opportunities to extend downtown area
- Heavy volume of automobile traffic

The high level of commercial office vacancy suggests an opportunity for the Springfield BID to assist property owners. A program to recruit commercial tenants, including relocating existing tenants out of the (potential) Morris Avenue redevelopment zone, could help to fill these vacancies. With an estimated vacancy rate of 25%, there is significant unoccupied space to fill.

[3] *Office Insight New Jersey, Q2 2012*, Jones Lang LaSalle. Their report is found here: http://www.us.am.joneslanglasalle.com/UnitedStates/EN-US/Pages/ResearchDetails.aspx?ItemID=8987

Mountain Avenue Retail Mix

Clustered retail offerings along Mountain Avenue are primarily neighborhood retail, similar to the offerings on Morris Avenue. Medical office space is prominent here, with 11 of the 132 office and retail storefrontsrecorded being medical-related professional services.

KEY FINDINGS

- Some destination businesses (Cioffi's, Hobbies & Airsoft)
- Clustered offerings improve retail viability
- Attracting new retailers will be difficult
- Best suited for neighborhood retail

The neighborhood-oriented nature of the mix along Mountain Avenue is not surprising. The corridor is predominantly residential, and the Avenue itself is not a regional artery. Outside visitors to Springfield tend not to utilize Mountain Avenue and might have difficulty finding businesses here. As a result, destination retailers are unlikely to have interest in locating here. Therefore, while we do not anticipate that these retail clusters along Mountain Avenue would evolve into a walkable, browse-shopping destination, we do recommend that Mountain Avenue (rather than Morris) be the place to locate any new retailers intending to serve neighborhood residents.

Example of neighborhood retail on Mountain Avenue

Stores within the corridor include:

- Fast food, take out, and desserts: 8 stores (6%)
- Beauty salons: 8 stores (6%)
- Dry cleaners: 7 stores (5%)
- Nail salons: 5 stores (4%)
- Banks: 4 locations (3%)
- Vacant storefronts: 8 vacancies (6% vacancy rate)

These stores include at least two established regional destinations. Cioffi's offers fine Italian specialty foods and imported goods, as well as a limited-service eatery and catering services. They attract visitors from throughout the region with their selection of hard to find imported goods. Similarly, Hobbies & Airsoft is a unique hobbyist retailer that sells high-end Airsoft weapons are specialty merchandise that attracts customers from great distance to purchase equipment or have it serviced. These destinations attract customers from throughout the entire region.

Additionally, we recorded 31 commercial offices not included in our retail analysis. Since lawyers, accountants, and medical offices attract customers and clients, we include them in our analysis of retail businesses. Of the commercial offices *not* included in our retail analysis, we discovered only two vacant offices for a 6% commercial office vacancy rate; however, as discussed in previously, this may be misleading since it measure office spaces and not square footage.

Due to the nature of this retail corridor, the diffusion of retail space, and the residential character, there is little opportunity to increase the retail infrastructure or offerings present. Due to the fact that Mountain is a local roadway not traveled by those from out of town, there is little traffic, compared to Morris Avenue and, of course, Route 22.

KEY CHALLENGES

- Residential character with limited retail space
- Limited retail draw
- Unknown office vacancy

Naturally, retail here has developed to meet local residential needs with few retail destinations. Although there are some vacancies, it does not appear to be an endemic problem. The best assistance the Springfield BID and Township could offer property owners would be a comprehensive recruitment plan to help fill vacancies as they occur.

A planned recruitment strategy would allow the BID to guide the retail mix and attract pre-qualified retail operators. Additionally, an active recruitment plan could assist with commercial office vacancy here and elsewhere in Springfield.

Another benefit that the BID could offer would be the implementation of a low- or no-interest improvement loan to improve façades, signage, and retail infrastructure. Older retail infrastructure has a harder time attracting retail tenants when vacancies arise, and is less appealing to shoppers where there is active retail. The BID should assist property owners in improving their properties to enhance the retail infrastructure and atmosphere.

Route 22 Corridor Retail Mix

Retail offerings along Route 22 are similar to what one could expect to find in and around a shopping mall, including clothing, electronics, full- and limited-service eateries, furniture, and a Barnes & Noble bookstore. These categories are primarily service by national and regional retail chains, with name-brand recognition and extensive marketing.

KEY FINDINGS

- Large, national chains with smaller in-fill retail
- Little opportunity for BID to influence mix
- Few retail destinations
- Very few opportunities to create retail synergy

In the older shopping centers, smaller pad sites, and as in-fill in the larger shopping centers, there a number of smaller local and independent businesses, in a wide variety of categories, including a very limited selection of professional services, some private commercial offices, and number of home improvement-related businesses. Floor coverings, window treatments, and granite and stone supply stores are all located on Route 22, although not within close enough proximity to one another to build a synergistic effect.

Finally, there are a large number of new and used auto sales and service centers. These very large sites are surely a regional destination for those in the market to purchase a vehicle, or to visit the dealership for service. Although they contribute to both the limitations of available on-street parking (on the side streets feeding to Route 22) and the traffic congestion along Route 22, they attract customers from throughout the region, as do all the offerings of Route 22.

National retailers along heavily-trafficked Route 22

However, one of the most severe limitations of the Route 22 corridor is that it is not strictly identified with Springfield, and the national scope of both property managers and businesses limits the ability of local government to influence the retail mix. The presence of so many national brand names and large-footprint businesses serving so many categories limits the pool of categories available for the rest of Springfield.

The largest problem on Route 22 is the process by which retail centers "go dark" as they age. Retail centers built to suit for anchor tenants find themselves unable to meet the demands of these retailers as long-term leases expire and they move to sites that are built to accommodate their changing needs.

The vast discrepancies in age among shopping centers makes it increasingly difficult for older shopping centers to fill retail space. As in other retail corridors, an active retail recruitment effort can assist property owners in finding the right, pre-qualified, retail operators to fill these spaces. Proactive efforts to recruit retail tenants is especially important in these older centers.

KEY CHALLENGES

- Little input with national property managers and retailers
- Older shopping centers gradually "going dark"
- Poorly maintained/fatigued shopping centers
- Very few opportunities to create retail synergy

Another challenge facing these centers is the lack of maintenance and fatigued appearance of many of the older shopping centers. The BID should target shopping centers that have serious issues with signage, façades, and other maintenance issues, and begin with offering loan improvement programs to assist them in improving their infrastructure. However, in the case of some shopping centers, code enforcement issues may be present, and the BID will have to work with the property owners to ensure properties meet all zoning and code requirements.

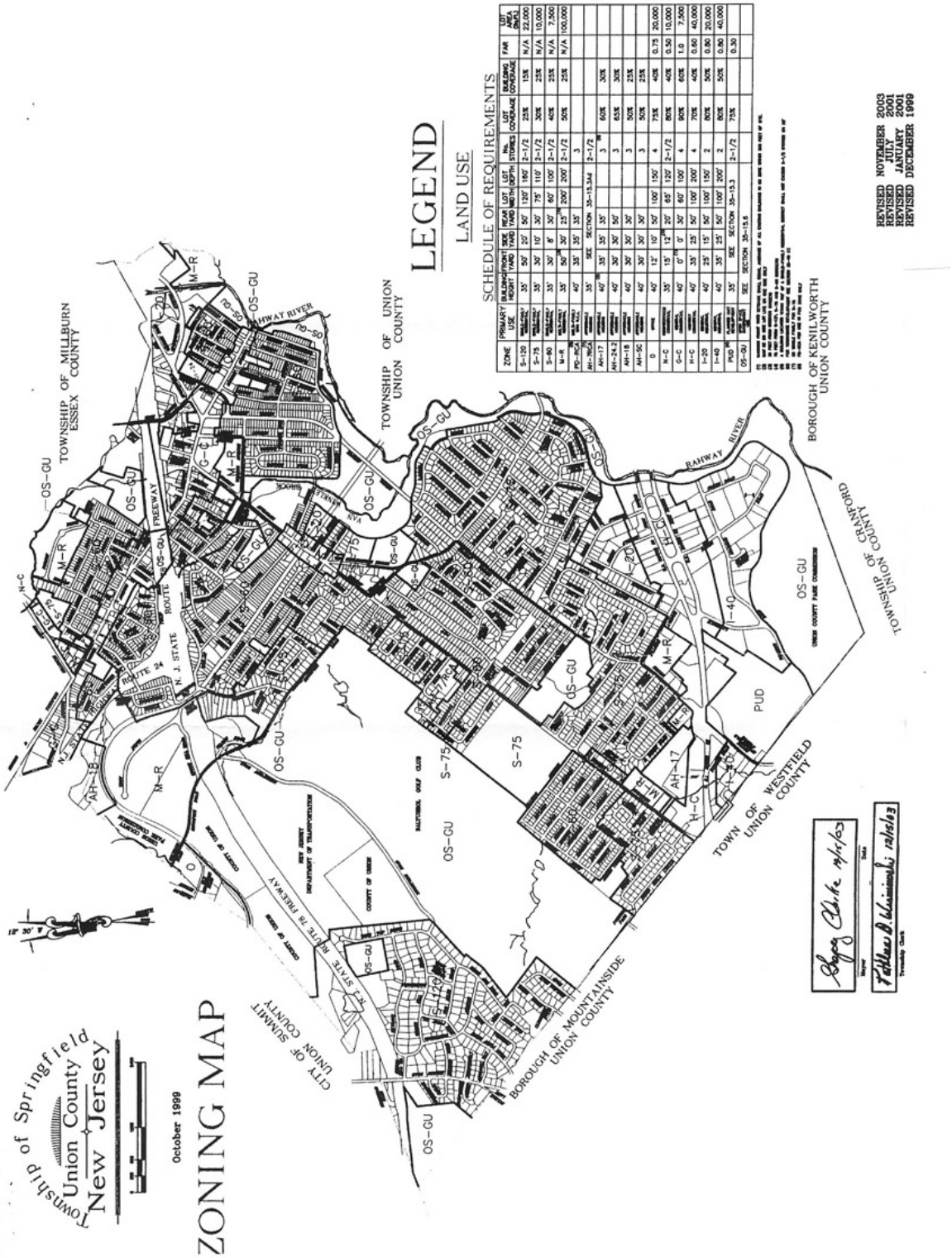
One of several car dealerships and strip centers with national and regional retailers along Route 22

Finally, one of the more complex challenges present in the retail corridors of Springfield is building relationships with property and business owners to help guide the retail mix and any retail development or redevelopment. Offering improvement programs and recruitment strategies both can facilitate these relationships, but the BID needs to initiate proactive steps to inform stakeholders of their efforts while inviting feedback from those in the community.

Zoning

There is little that we can recommend following our review of Springfield's zoning ordinance. It makes prudent distinctions between highway, neighborhood, and general commercial areas that allow for separate treatment of facades and signage that are appropriate to the distinct types of commerce available in each.

However, we do recommend that the Township consider allowing mixed-uses in its commercial zones, particularly with regard to office use. Downtown Morris Avenue is classified as a "general-commercial zone" and it is bordered on either side by office zones. (See zoning map, next page.) Rather than separating these uses, we believe that downtown commerce would be more vibrant with combined office above commercial and/or residential use above commercial. By allowing these combinations, the Township would place "more eyes and feet on the street;" that is, more residents or office workers would be present at various times in the downtown commercial district. More "feet on the street" is the equivalent of more shoppers, while more "eyes on the street" means more security. A modification to allow greater residential density above retail, in the form of mid-rise condominiums or apartments, would also put more eyes and feet on the street, creating a larger, built-in customer base.


ZONING MAP
Township of Springfield
Union County
New Jersey
October 1999
LEGEND
LAND USE
SCHEDULE OF REQUIREMENTS
TOWNSHIP OF MILLBURN ESSEX COUNTY
TOWNSHIP OF UNION UNION COUNTY
BOROUGH OF KENILWORTH UNION COUNTY
TOWNSHIP OF CRANFORD UNION COUNTY
TOWN OF WESTFIELD UNION COUNTY
BOROUGH OF MOUNTAINSIDE UNION COUNTY
CITY OF SUMMIT UNION COUNTY
RAHWAY RIVER
N. J. STATE ROUTE 24
STATE ROUTE 78 FREEWAY
REVISED NOVEMBER 2003
REVISED JULY 2001
REVISED JANUARY 2001
REVISED DECEMBER 1999

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Consumer/User Analysis

Merchant Interviews

In order to gain a better understanding of the Springfield business community, we spoke with local merchants in person-to-person interviews. During the months of February and March 2012, we interviewed 18 Springfield merchants. Their businesses comprise a broad variety of uses including restaurants, convenience stores, liquor stores, a fashion salon, and professional services. Furthermore, the interviewees represent all three major retail corridors of Springfield: Morris Avenue; Mountain Avenue; and Route 22. Their comments have been summarized anonymously to give a broader sense of the perspective of Springfield merchants.

Business Conditions

The average retailer that we interviewed has operated in Springfield for about 9 years. Some had been established in Springfield for more than 20 years while many others had been in Springfield for 2 years or less. Most of them rent their properties and seem to be satisfied with the space that they occupy. However, about one third of the merchants said that they would prefer a larger space. A few that were satisfied with their spaces also mentioned having expanded in the past.

We inquired whether their volume of sales had been higher, the same, or lower than the previous year. Despite the ongoing national recession in 2011, not all merchants saw a decline in Springfield. In fact, five merchants—nearly one-third—experienced growth in sales over the past year. Another third said that sales had remained the same, and the remaining third had declining sales. Neither was there a pattern with regard to years in business, or in location of the business (with regard to Morris Avenue, Mountain Avenue, or Route 22). Growth in sales is typically tied to demand for the retail category, quality of merchandise/level of service offered, business reputation/advertising, and visual merchandising. Though limited, this data set demonstrates that

the business districts of Springfield currently provide opportunity for growth to knowledgeable merchants.

Customers and Marketing

The customer base for the merchants interviewed originates from the wider region. While many, if not most of their customers are from Springfield, all but two of the businesses we spoke to said that they draw customers from surrounding towns as well. Multiple merchants listed the location of Springfield in proximity to nearby towns and destinations as the impetus for locating their businesses here. However, not all of the businesses that we spoke to relied on area residents for their business. Two of the merchants have websites that they use for online sales, while a doctor and another merchant even draw an international clientele. Given the high number of doctor offices in Springfield, it is possible that some other professionals here have a similar draw.

These merchants had mixed approaches with regard to marketing (from frequent marketing, to no marketing, described more particularly below), with no apparent correlation between business sales and regular advertising. Although this outcome is inconsistent with the typical finding (that marketing boosts sales), we attribute this result to two factors: 1) we did not evaluate the effectiveness of the marketing utilized; and 2) the group of merchants willing to be interviewed was too small to be a reliable sample of the whole.

Regular marketing to customers was not a majority practice among the merchants with which we spoke. While 13 of the 18 respondents have engaged in advertising, only nine of the merchants said that they currently advertise on a regular basis. Businesses that did not market themselves all had different reasons for not doing so. Some had tried to advertise with no return, others did not have the budget for advertising, and others were established businesses that felt they had a strong enough presence to not need any. Those that do advertise regularly differ in what is most effective for them. E-mail, direct mailing, magazine ads, a website, and word of mouth were listed by individual merchants as their most effective medium for attracting customers. Most of

the businesses had not considered cross-promotion as a marketing method. While four of the businesses had engaged in cross-promotion, it was something that had been done in the past and not continued. Even though so few businesses had considered cross-promotion, they were receptive to the idea of a BID effort to collectively market Springfield businesses.

Given the extreme importance of advertising to successful retailing, it is clear from this cross-section of merchant responses that there is a great opportunity for the BID to support Springfield businesses with assistance in district advertising, cooperative ad campaigns, cross-promotions, establishment of business websites linked to a BID website, internet sales, and social media development.

Challenges and Opportunities

While talking with merchants, a few concepts repeated themselves as the main problems that merchants face. In each of the retail corridors, at least one merchant mentioned that signage ordinances are either too restrictive or too difficult to navigate. Five merchants expressed this concern, complaining that signage restrictions made it too difficult for people to notice their business, making them appear closed. Others complained that the process for approving signage was very tedious and should be revised to be more streamlined and approachable.

On the whole, merchants on *Morris Avenue* seem to have the most concerns. One complaint that was particular to Morris Avenue is that the downtown's appearance lacks appeal. Poor upkeep and some vacancies hurt Morris Avenue and merchants feel that this drives away customers that don't wish to shop in such an unattractive retail corridor. Lighting on Morris Avenue was also concern. Merchants complained there is insufficient pedestrian and storefront lighting at night, so the area feels unsafe and shoppers avoid the area. Furthermore, even though the high vehicular traffic provides good visibility, some businesses felt that the high volume and speed of that traffic prevents Morris Avenue from being as walkable as it should be. Parking was the final issue that

was particular to Morris Avenue. Merchants complained that their customers have been ticketed under the metered parking system, which they believe discourages repeat business.

The *Mountain Avenue* and *Route 22* merchants did not have as many concerns as those on Morris Avenue, besides complaints about signage. One Route 22 merchant did complain about access being difficult given that you may only enter from one direction and leave from the other, but this was the only complaint.

Economic Development

We asked merchants how they feel about the BID and the Chamber of Commerce. Most of the merchants that we spoke with were either unaware of the BID or had no opinion of their activities. This indicates that there is a need for outreach in the business community regarding the BID. Merchants were more aware of the Chamber of Commerce and generally had a good opinion of their activities, but a few merchants also mentioned that additional contact from the Chamber would be welcome.

Summary

Merchants in Springfield appear to have different concerns about the retail situation depending on where they are located. Morris Avenue storeowners tend to have the biggest range of concerns including façade upkeep, vacancies, lighting, and litter. However, complaints about signage ordinances came from all three of Springfield's retail areas. The BID is already a great liaison for business to local government, and it offers a great resource to the business community to solve all of these problems, yet awareness of the BID is low among the merchants we met. In addition to crafting solutions to these issues, it will be important for the BID to build awareness of the programs and services that it offers to all of the merchants of Springfield.

Stakeholder Interviews

We interviewed 22 individuals who were identified by the Springfield BID as people with a stake in the future of commerce in the community. They included elected and appointed officials of the local government, commercial property owners, business people, several members of the BID's board of directors, and volunteers in service to the community. We asked each of them the same set of six subject areas designed to provoke conversation about retail commerce in Springfield and their visions for its future. Each stakeholder was encouraged to speak freely and were promised that, although their comments were taken down, there would be no direct attribution of their remarks in this report. The following is a summary of their responses to the six topics discussed.

Overview of the community

Many of the stakeholders provided us with an impression of Springfield that has changed over time. Springfield was a small, well-knit community prior to the 1960's. When I-78 was built, it provided greater access to New York City, transforming Springfield into a bedroom community for people that wanted to work in New York without having to pay the high costs of living there. The status of bedroom community is how stakeholders generally see Springfield today, and it has greatly affected the relationship between merchants and the residents. Residents were normally described as being either middle class or upper middle class, and having little interaction with the business community. They indicated that this is because the business offerings in Springfield are not seen as being of the same caliber as those in Westfield, Short Hills, or New York City.

The stakeholders all recognized that retail business occurs in three distinct and separate areas in town: Morris Avenue; Mountain Avenue; and Route 22. As with our merchant interviews, most stakeholder comments were geared towards Morris Avenue. At the moment, stakeholders see *Morris Avenue* as the community's downtown core, but view it as a somewhat dilapidated corridor that does not provide enough retail offerings. Many of the businesses there have similar

offerings, and do not provide a high quality of product. The inadequacy of parking is also a defining feature of Morris Avenue, in their collective view. When speaking of Morris Avenue, stakeholder comments tended to focus on that portion running between Caldwell Place and Mountain Avenue; they had little to say about the commercial portions of Morris Avenue east and west of the downtown portion.

Mountain Avenue does not have as many challenges as the Morris Avenue downtown, but some stakeholders did speak to the concern that the facades there are worn and in need of renovation.

The *Route 22* corridor is seen by most stakeholders as its own entity, identified more with the State highway (which is fronted with retail businesses in several towns) than as a part of Springfield Township. The businesses there are major national and regional companies that maintain their corporate-prescribed appearance, and the area does not appear to need as much assistance as Morris or Mountain.

Relations among Springfield merchants, government, and consumers

Many stakeholders indicated that the relations between local business and local government have improved. Up until recently, it was felt that the government was unresponsive to the needs of businesses, but with the BID and the new administration, relations seem to be moving in a more positive direction.

Vision for the future

The stakeholders generally expressed a positive view of the residents of Springfield and the location of the town. Their vision for its commercial future was very positive. Much of that vision focused on a rebirth for Morris Avenue through redevelopment. However, many emphasized that they do not want the redevelopment of Morris Avenue to come at the expense of Springfield's other shopping destinations. Morris Avenue is the traditional downtown area, and the stakeholders share a clear and uniform desire to restore its prominence in this capacity, and

the communal environment associated with a successful town core. Many expressed phrases associated with traditional downtowns such as "walkable sidewalks," "café-style dining," "browse-shopping," "boutique stores," "public gathering spaces," and added to that a desire for convenient, adequate parking.

In order to achieve their vision, stakeholders planned to make the corridor more attractive appealing by offering a greater variety of stores that have better maintained facades. A few stakeholders suggested uniform design standards in order to help create a more thematic feeling of downtown Springfield. Besides making it more appealing, stakeholders recognized that Morris Avenue would need to be more accessible. So, it was suggested that traffic be slowed in order to encourage pedestrian traffic and parking should be improved.

Many stakeholders spoke of the need to capture a sense of distinction that would separate the downtown Springfield shopping experience from the many other shopping alternatives in the region—particularly the several malls that attract the most affluent consumers. Many of these referred to Springfield's colonial history and the "forgotten" battle of the Revolution that raged along old Morris Avenue near the current downtown area, and wondered whether this might provide a theme and a guide for appearance that shape the future of downtown commerce.

SWOT Analysis: Strengths of the community that aid commerce

(SWOT is an acronym for "strengths, weaknesses, opportunities and threats." We have separated the SWOT topic discussion into its four parts, beginning with strengths):

Strengths: The stakeholders were enthusiastic in their description of Springfield as town of multiple strengths to benefit commerce. This emphatic response was consistent with their positive view of the town's commercial future. First among their list of strengths was Springfield's strong location: New York City is very close and the various options for accessing that city make Springfield a popular location for commuters to reside or to pass-through. While

there isn't a train station in Springfield, there are buses to the city as well as shuttles that provide access to the adjacent Short Hills train station.

Other qualities that were recognized as strengths for business included:

- Springfield has low commercial rents relative to surrounding areas, which makes it easier for the town to attract good businesses.
- Springfield is surrounded by other densely-populated affluent communities, adding to the pool of nearby shoppers with the means to support local commerce.
- Great access through highly-trafficked major roads (I-78, Route 22, the Garden State Parkway, Springfield Avenue, and Morris Avenue itself), which boost visibility, and facilitate shopper visits.
- The presence of destinations, such as the NJ Department of Motor Vehicles building. While it is located off of the main roads on Center Street, it is close to Morris Avenue and encourages travel through the center of town.
- A powerful spirit of volunteerism that enables the community to provide support services (like the online *Patch* news blog, production of events like the annual car show, the local *Patriot* newspaper, and the business improvement district itself) to business, which others cannot do.

Weaknesses: The most common complaint among stakeholders was that the Morris Avenue downtown is not visually appealing. (We cannot overstate the strength, depth, or uniformity of stakeholder feeling on this point.) They believe that Morris Avenue stores are not maintained to the level that they should be, and this makes people less inclined to shop there. Because Morris Avenue is a major gateway into Springfield, the negative impression imparted by these stores extends not just to Morris Avenue, but also to the entire town. Poor appearance there is thus a negative factor for most other Springfield businesses (although it may not impact those businesses on Route 22).

The stakeholders also identified a need for more businesses and a better variety (or "mix"), particularly for the Morris Avenue corridor. There are not enough businesses to get visitors to stop; with more businesses, shoppers would have more reason to use Morris Avenue as an alternate shopping destination. A better retail mix would also provide more reason for a broader range of shoppers to visit the district. However, the stakeholders also indicated that the changes necessary to resolve any of these weaknesses are difficult to achieve, as absentee landlords own many of the Morris Avenue commercial properties. These owners are unfazed that the properties are unattractive, are disinclined to invest in their expansion or improvement, and have been unresponsive to efforts to consider the needs of the downtown.

The high speed of traffic was also considered not only a weakness, but also a major problem because it makes driving in the downtown intimidating to potential shoppers and creates a sense of danger for pedestrians. They feel that shoppers on foot prefer not to walk on narrow sidewalks so close to this traffic, or to cross Morris Avenue. They believed that many potential shoppers might avoid shopping there as a result.

Opportunities

The most commonly expressed opportunity for Springfield was its vast amount of underutilized commercial and public space. Many stakeholders listed one or more buildings that could be changed into something that would draw more customers. The Department of Public Works building on Mountain Avenue was mentioned most often, with stakeholders making varied suggestions for its redevelopment or re-purposing, such as a parking garage, bus depot, performing arts center, or a restaurant by the canal. The United States Postal Service sorting facility on Mountain Avenue was mentioned as a potential commercial site, as well as the vacant former Saks Fifth Avenue store, and the vacant storefronts at 251 Morris Avenue, in the new building built and occupied by Jack Zuber, DDS. In addition to these locations, some stakeholders also mentioned that increasing the allowable building height could be a way to better take advantage of space in the retail area.

There are other aspects that are unique to Springfield that stakeholders considered to be special opportunities. The Baltusrol Country Club is an internationally-known sport venue in town, but stakeholders that mentioned the golf club noted that it attracts shoppers and diners to nearby towns instead of Springfield. If Springfield were able to capture the business of this golfing community, it could be a significant gain.

Many individual stakeholders listed other opportunities in Springfield that were only mentioned once by that particular stakeholder. These opportunities included:

- marketing to the substantial local Orthodox Jewish community,
- new shoppers to be attracted by the incoming Walgreens pharmacy, and
- new visitors that will attend ball games at the turf field recently approved for the high school.

Threats

Stakeholders were fairly muted in their descriptions of threats to their future vision. The most common response we received is that there were "no threats." Beside this, the biggest concern seemed to be that certain problems in Springfield seem to be out of their local control; namely, these were the State roads and the flood plain that encroaches upon the Morris Avenue downtown, and is regulated by federal and State law.

The two main retail roads in Springfield are Morris Avenue and Mountain Avenue. Morris Avenue is both state road 82 and 124 near the Mountain Avenue intersection. On the northern stretch of Morris Avenue where it splits into Morris Avenue and Morris Turnpike, it becomes County Route 527. Mountain Avenue is County Route 635 for its entire length in Springfield, and Route 22 is a federally owned United States highway. To a lesser extent, this is also true for South Springfield Avenue and Hillside Avenue, which are much smaller business corridors that are also on County roads. The fact that Springfield does not control these roads bothers

stakeholders since one of their major concerns is the high volume and speed of traffic. While this does not make the problems insurmountable, it does add another layer of difficulty if any changes would be made about the movement of traffic in the downtown.

This is also the concern for flooding. Much of the Morris Avenue and Mountain Avenue intersection lies on a flood hazard area, which comes with restrictions from the New Jersey Department of Environmental Protection.

There were also individual stakeholders that listed threats that other stakeholders did not mention. These threats included a poor reputation of Springfield, there not being enough shoppers, and a mentality that nothing should be changed.

Events that attract visitors

Stakeholders overwhelmingly described the Fall Festival and Car Show as the main event that attracts shoppers. This festival is run by the Chamber of Commerce, and most recently featured a car show, petting zoo, food and craft vendors, as well as other attractions. Stakeholders felt this event was successful in that it used local vendors and is able to attract visitors from outside of Springfield. Similarly, the 4th of July celebration was praised for attracting outsiders. Other events were mentioned as being successful, positive aspects of Springfield, though they did not necessarily bring in visitors or aid business in a major way. These events included the summer concert series, the farmers market, and the Sprint for Springfield Schools 5k run. Stakeholders also mentioned the turf field, which some hoped would bring in visitors who come to see games.

Resources that businesses should tap

The most commonly referenced resource among stakeholders was Springfield's revolutionary history. While stakeholders differed in how much they wanted history to play into the town's identity, most of them did see it as a resource that can be capitalized upon.

Stakeholders also tended to see the Springfield community itself as a resource. There is an active volunteer community with groups such as the Lions Club, the Rotary Club, and the Patriot. Also, there is a fairly involved group of corporate citizens that help the town. Several stakeholders referenced resident, developer, and owner of the Minnesota Vikings professional football franchise Zygi Wilf as a person who might be a resource to benefit revitalization in Springfield.

Other identified resources included the public park "Meisel Field," the video studio at the high school (which facilitates local video production), and the township's planning board, which has taken a progressive view toward redevelopment to benefit commercial revitalization.

Consumer Survey

The core component of our Community Insights™ market analysis is the consumer survey, which provides vital insights into the composition, behaviors, perceptions and preferences of Springfield's audience. The Springfield consumer survey ran from April 4, 2012 to May 9, 2012 and was heavily promoted by the municipality, within the township, and within two-dozen local retailers and businesses.

KEY FINDINGS

- High income consumer audience
- Low capture rate of consumer spending
- Restaurants are very popular
- Consensus for change

In total, we received 942 responses (805 online; 137 mailed), exceeding our expectations and resulting in a low margin-of-error rate of 3.3%. (Full survey results are with this report as included as Appendix A.) From these responses, we first define the Trade Area, which is the geographical area within which the vast majority (at least 70%) of the target audience resides. We found that, overwhelmingly, the visitors and shoppers to Springfield who make up the core audience reside right within Springfield's home zip code of 07081.

Over 90% of all respondents indicated that they reside within Springfield. This may be skewed, in part, due to the promotional efforts within the town itself, but more than likely it is indicative of the reality that Springfield's retail offerings do not attract shoppers from the larger region. Given our observations of the retail offerings in the *Physical Analysis* section, it is unlikely that Springfield is attracting a regional audience to shop or dine in town.

Further, we found that very few respondents are frequent shoppers or diners in Springfield. We divided respondents into the categories of "Shoppers" or "Non-shoppers", with the distinction being that Shoppers visit retail offerings within town twice a month or more. Only 25 percent of all respondents—one-in-four—indicated that they shop in Springfield twice a month or more.

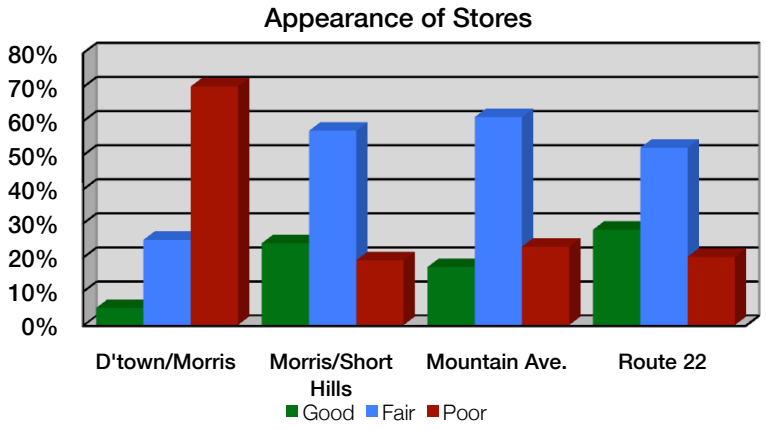
The demographics of respondents were very similar to the demographics reports we analyzed from syndicated data sources. Respondents indicated that they have high household income; over 50 percent reported annual household income between $100,000 and $250,000, and nearly 10 percent reported annual household income over $250,000. Most interesting is that *Shoppers* tend to be made up of those with lower incomes than all respondents.

More Shoppers reported household income between $75,000 – $100,000, compared to *Non-shoppers* by about 5 percent. Given our analysis of the current retail offerings, it seems likely that the type of retail offerings necessary to attract a higher-end audience aren't found in Springfield's shopping districts.

There was consensus among *Shoppers* and *Non-Shoppers* that change is needed in Springfield's retail corridors. Both groups rated "attracting new business" as the most important goal for improvement. Other important goals selected by respondents included "revitalization", "create more browse-shopping on Morris Avenue", "attract more dining", and "attract more shoppers".

The support for revitalization of Morris Avenue and the creation of a walkable downtown district with browse-shopping and dining options is very high. We see similar issues arising from querying consumers about what they like and dislike about Springfield's retail districts.

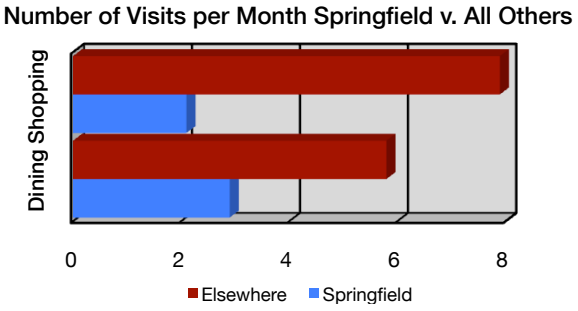
Dissatisfaction with Morris Avenue is high, with 70 percent of all respondents rating the district overall as "poor". They indicated dissatisfaction with the retail mix, streetscapes, pedestrian safety, and available parking. When comparing all of the districts within Springfield, consumers were most satisfied by the retail offerings along the Route 22 corridor.



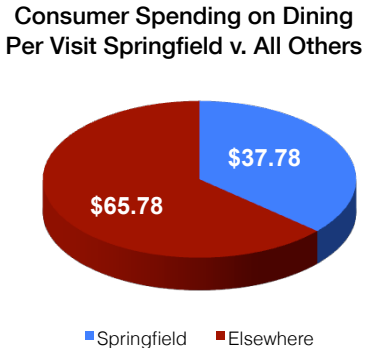
To understand shopper behaviors, the survey posed a series of questions including their frequency of visits to Springfield's retail and dining offerings and their spending when shopping and dining here and elsewhere. We discovered that Springfield's shopping and dining offerings capture very little of the total spending by the average consumer.

Respondents indicated that they dine outside of the district nearly twice as often and spend twice as much as they do within the district. *Shoppers* indicated that they dine outside of Springfield as often as six times a month and, on average, spend $65 per meal. The same group indicated that

they dine at Springfield eating places just four times per month and spend an average of $38 per meal.

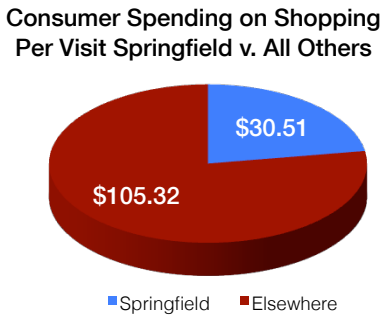


The findings were even more pronounced among *Non-Shoppers*. *Non-Shoppers* dined outside of Springfield only slightly less than *Shoppers* (5.73 times per month compared to 6.19), but dined within the districts much less frequently, averaging 2.5 times per month, compared to *Shoppers* who do so 4 times per month. Just as *Shoppers* reported, they spent about $65 when outside of the districts and only $38 within.



There is a greater degree of differentiation between *Shoppers* and *Non-shoppers* regarding shopping habits. Most noteworthy, although we classified *Non-shoppers* as people who shopped in Springfield less than two times per month, all *Non-shoppers* indicated that they visit less than once per month. Even more striking is the finding that 44 percent of all respondents told us that they <u>never</u> shop in Springfield. Moreover, *Non-shoppers* indicated that while they spend an average of $113 per shopping trip outside of Springfield, they spend only per visit $18 when shopping in Springfield.

Shoppers showed less extreme differences, although they still shop outside of Springfield more frequently than inside the districts and spend more money per trip when doing so. On average, *Shoppers* spend about $86 per shopping trip outside of town and go shopping about 10 times per month. Within Springfield they only shop 7 times per month and spend an average of $62 per trip. All respondents spend 3.5 times more outside of town than they do here.



Clearly, the *Non-shopping* group—which accounts for nearly three-quarters of all people who responded—represents the greatest opportunity for Springfield merchants to grow their sales. While *Shoppers* will visit the district 6.6 times/month and spend nearly $62 per visit, *Non-shoppers* visit only one-tenth as frequently and spend only $17.73 when they do. By addressing their complaints—poor retail mix, poor parking options, unattractive appear of the downtown, etc.—we could convert these *Non-shoppers* into *Shoppers*. Moreover, 91 percent of these *Non-shoppers* live right in Springfield!

What is the value of converting a *Non-shopper* to a *Shopper*? First, they would increase their average spending per visit by more than $44 (from $17.73 to $61.92). Second, they would increase their visits tenfold, from 0.6 times to 6.6 visits per month. That is an increase in monthly spending in Springfield of $398.04 per individual. Over one year, that would be an increase of $4,776 per person. If we converted only the *Non-shoppers* who took the survey—just 490 individuals—that would represent an increase in retail spending in Springfield of more than $2.3 million in a year!

Let's take that one step further. Let's assume that each *Shopper* and each *Non-shopper* represented a household. There were 6,201 households in Springfield as of the 2010 Census. If

74 percent of these are households of *Non-shoppers*, that would total 4,589 households. The annual value to Springfield retailers of converting these *Non-shopper* households to *Shopper* households would be $21.9 million per year. That represents real growth for local merchants and it doesn't even address the gains to be made in dining sales for restaurants.

One of the important findings of the survey showed that more dining options help to attract shoppers. While 100 percent of *Non-shoppers* declared that they don't shop in Springfield, only 22 percent indicated that they do not dine here. Although the retail shopping offerings may be insufficient to capture their dollars, the dining offerings are not.

KEY CHALLENGES

- Improve the capture rate of audience visits and spending
- Redevelopment of Morris Avenue into walkable downtown district
- Recruit more restaurants to broaden selection and attract visitors
- Consensus for change

We also asked about use of public transit options, including the Jitney transportation service and public bus lines. Nearly 100 percent of all respondents indicated they use these services once a month or less, suggesting that most consumers are not interested in public transit offerings.

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Economic Analysis

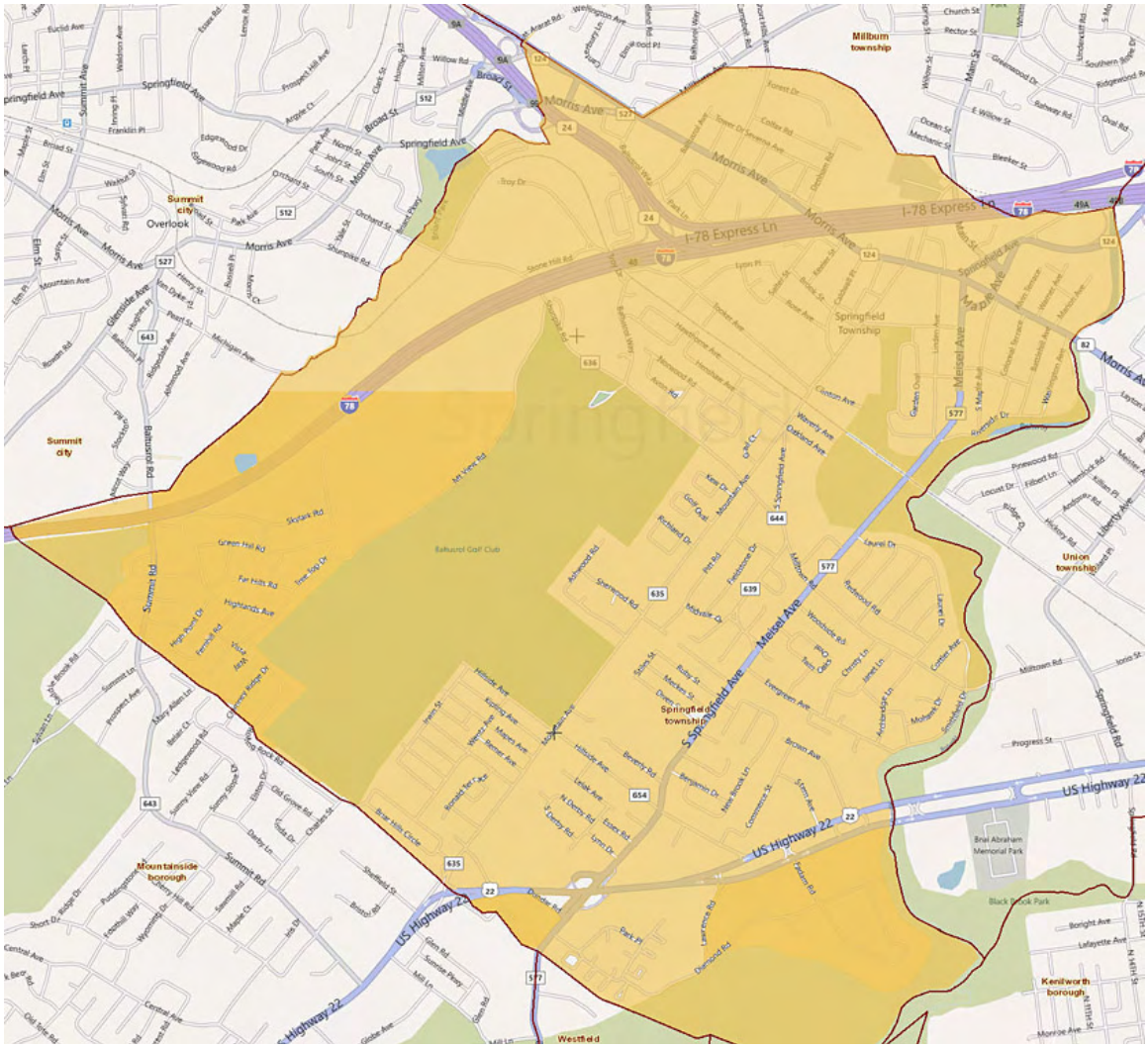
Trade Area

The retail "Trade Area" is that geographic territory from which a large majority (at least 70%) of shoppers that patronize a given shopping district reside. A Trade Area may be determined in several ways, from projections based on the type of stores in the district, to consumer records from a sampling of representative merchants, to more specific means. In this case, we have applied the most specific analytical method possible: the consumer survey. In the survey, we asked respondents to provide us with their residential zip code, allowing us to determine Springfield's Trade Area with great specificity.

Guided by the findings of the consumer survey, we created a Trade Area—defined as the home zip code of Springfield—and analyzed syndicated data of both the Trade Area and the surrounding region. Our findings provide further information about the demographic and psychographic characteristics of the consumer audience, as well the economic realities of the market.

We offer two additional points on Springfield's Trade Area. First, we do not consider the respondent population to be representative of that group of shoppers that patronize the businesses of Route 22. We believe that, by their nature (they are national and regional destination businesses, located on a busy State highway), those businesses attract shoppers from a wider region, and not just from Springfield Township. In all likelihood, these shoppers did not participate in the survey in sufficient numbers to reflect their presence; perhaps they did not recognize that they are shopping in Springfield businesses when they patronize these stores, as municipal boundaries are blurred along the Route 22 corridor.

The second point is that the survey has told us what Springfield's Trade Area is today; it does not reveal Springfield's potential Trade Area. We believe that Springfield's business community can aspire to a much wider Trade Area, attracting consumers from a farther range and in much greater numbers than it currently does. This would require the conversion of Morris Avenue into a shopping destination, and we address that possibility in the *Strategic Recommendations* section that concludes this report.



Springfield trade area

Demographic & Psychographic Profiles

Within the Trade Area there is a population of 15,430 people living in 6,201 households. Consistent with our survey results, the demographic data reveals high levels of annual household income with a median of $89,109. Nearly half of all households (43%) have household income in excess of $100,000 and almost 10 percent have household income that exceeds $200,000 per year. Most notably, 1.7 percent of households have income exceeding half a million dollars, annually.

The population is primarily white, married, and middle aged, with a high education attainment. Over half of the entire population possesses either a bachelor's degree or advanced degree. The characteristics seen here reflect a highly educated, well-paid, professional population, that is likely to own their own homes, be married, and have children.

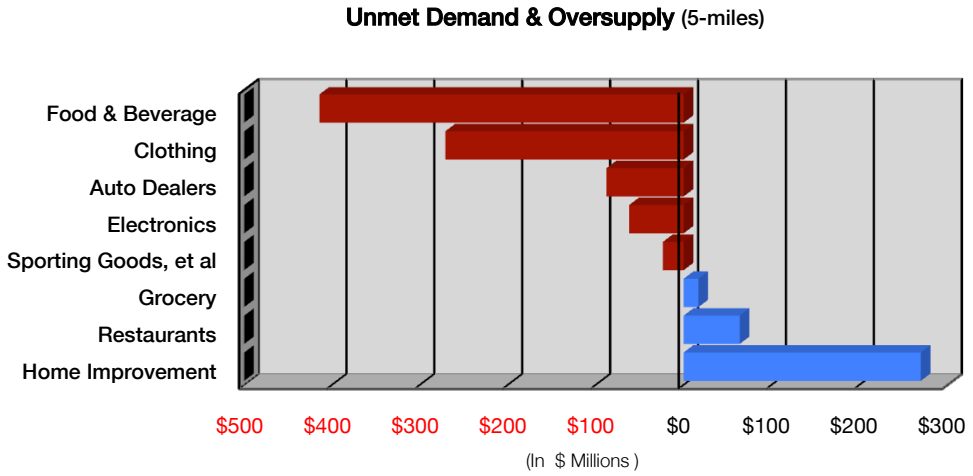
These characteristics are represented in our consumer survey, syndicated data, and further reinforced by the psychographic profiles that are included with the syndicated data appended to this report. Over half of all households fall into either the "Wealthy Seaboard Suburbs" segment or "Urban Chic" segment. An additional third fall into either the "City Lights" segment or "Retirement Communities" segment. They tend to shop online and at luxury department stores such as Macy's and Nordstrom's, as well belonging to discount clubs such as Costco or BJ's Wholesale Club. Their ages range from late thirties to early retirement.

The primary differences among these groups hinge on the type of housing and neighborhood in which they reside. We note that no individual can be perfectly defined by a psychographic profile; even a group of people can reflect a majority of the profile's characteristics while having no connection with some others. In this case, we note that the psychographic segments' housing profile references are incongruous with the residential infrastructure actually observed in Springfield; particularly the Urban Chic and City Lights segments, which speak of high-rise apartment living. Nevertheless, these profiles provide valuable insights into other lifestyle

characteristics of the consumer audience within the Trade Area, and these profiles will prove useful in the recruitment of desired retailers.

Economic Profile

We examined consumer spending and retail sales within the Trade Area and the region, and found significant retail oversupply (greater retail sales than consumer spending) both within the town and throughout the region. In the Trade Area there is $260.6 million in retail oversupply, within a three-mile radius that number grows to $735.2 million.



At a five-mile radius, we found some unmet retail demand, and more than half a billion in unmet demand within a ten-mile radius. However, that unmet demand is within very limited retail categories. The most significant finding within the wider region is high retail leakage (consumer spending that is not captured by businesses within the radius) in the categories of full- and limited-service eating places.

There is unmet demand for full-service restaurants in all three of the radii we examined, and within Springfield itself. Within the borders of the Trade Area, there is $1.4 million in unmet demand for full-service restaurants, an amount that increases to $7 million in the three-mile radius, $63.8 in a five-mile radius, and a whopping $164.1 million in the ten-mile radius.

An important caveat to keep in mind is that no retail offerings will be able to capture 100 percent of consumer spending within an area, and greater wealth of a consumer audience provides greater mobility for their shopping and dining excursions. Consumers throughout the region take vacations, shop online, and travel, all providing opportunities for them to spend their dollars outside of the Trade Area or region.

However, given the low capture rate uncovered in the consumer survey, it is reasonable to assume that Springfield's shopping and dining offerings can be improved upon to capture a higher percentage of consumer spending. Since there is such significant unmet demand throughout the region, a unique restaurant destination could capture significant amounts of this retail leakage.

KEY CHALLENGES

- Significant competition throughout the region
- Unmet demand in few retail categories
- High levels of retail oversupply
- Capturing dollars spent outside of Springfield

To reiterate, Springfield merchants have a large, virtually untapped audience of Springfield residents to attract for more business. The value of converting *Non-Shoppers* into *Shoppers* is worth nearly $22 million/year in additional retail sales. Add to that the value of sales to non-residents who do no shop in Springfield today, and the potential sales growth is even larger. To achieve this, it will be necessary to make the improvements that *Non-shoppers* tell us they want: a more attractive downtown; a better retail mix; and more full-service dining choices.

Sustainable Retail Categories

Our recommendation for sustainable categories of retail to pursue derives from our determination of the intersection of consumer survey responses (the evidence of what your shoppers want) with syndicated data for your trade area (specifically, the categories of retail that are under-served and supportable). A retail category that is both preferred by consumers and found to be underserved in your trade area is one that is most likely to succeed in your district, and be easier to recruit.

From the responses to the survey, we learned that people wanted a better class of full-service dining. A significant segment (17%) asked for coffee shops. They also wanted to see clothing stores of all categories (men's, women's, children's, infants', etc.), more grocery stores, and gift boutiques/greeting card stores. Many of those who would like to see more clothing stores specified that they would prefer to see value/moderately priced clothing—a market segment that is no doubt not being served by the regional clothiers at Short Hills Mall, Livingston Mall, or downtown Westfield.

We asked all respondents what would get them to visit Springfield more[4], and their responses to that question form a list of priorities of what must be done in order to capture more business for Springfield merchants and restaurateurs:

- 81% said they want casual, full-service restaurants
- 77% said they want outdoor dining/sidewalk cafes (80% of *Non-shoppers*)
- 75% said they want coffee shops/cafes (77% of *Non-shoppers*)
- 74% said they want delicatessens / sandwich shops

Their dining-related answers were twice as high as those in all other categories (such as clothing and grocery, which also had significant response, but not as much as these dining options). There is an overwhelming desire for more/better dining choices. Clearly, there is also a desire for a

[4] This was asked in survey question #13; restaurant preference was question #3, and store preference was question #4. A copy of the survey and a summary of responses to each question is attached to this report as Appendix A.

special social setting to enjoy this experience: outdoor sidewalk dining and sidewalk cafés. We made particular note of the fact that in all cases, a strong majority of *Non-shoppers* expressed this desire. This is precisely the group that the business community needs to attract.

Next we turned to the syndicated data[5], which tells us actual retail sales (supply)/consumer spending (demand) patterns in your trade area, by retail category. In particular, we examined the numbers for the retail categories most preferred by the survey respondents: restaurant, clothing (all categories), grocery, and gift/card shops.

In the restaurant category, we found substantial levels of unmet demand. In the full-service restaurant category alone, we found $63.8 million in unmet demand within a five-mile radius of downtown Springfield. With annual average revenues of $1.6 million required to support the average full-service restaurant, this level of demand could support 40 new full-service restaurants. If Springfield could capture just 20-to-30 percent of that demand, this could support as many as 8 to 12 new full-service restaurants.

In the clothing category, we found over-supply in excess of $271 million/year within a five-mile radius. Clearly, the town's proximity to the Short Hills Mall, Livingston Mall, and downtown Westfield were reflected in that result. Those locations are destinations for clothing shoppers in virtually every category of clothing; however, not in **all** clothing categories. Those centers focus on upscale, name-brand categories. It may be possible to attract clothiers of value/discount brands—one area of clothing that was specifically requested by many of the survey respondents. However, it will be important to consider whether such retailers would be appropriate to your plan for retail recruitment in Springfield. While a TJ Maxx or Target store might be appropriate for the Route 22 corridor, neither one would be desirable for downtown Morris Avenue.

[5] All of the syndicated data on retail supply and demand is attached to this report as Appendix D, and our analysis of this data is found in the "Economic Data Analysis" section of this report.

In fact, there is evidence of another direction in clothing stores that could be pursued on Morris Avenue: specialty clothing. There is currently one custom women's fashion designer on Morris Avenue (Thomas Lavone); it is possible that a redeveloped Morris Avenue downtown area could support several distinctive, boutique-clothing shops that could survive in this market without competing directly with the name brands found in area malls. Specialty infant/children's clothing; monogramming; sports clothing boutiques; and bridal boutiques are all examples of specialty clothing that could excel on downtown Morris Avenue despite the regional oversupply of retailers in other clothing categories. These types of specialty clothing would function well in the smaller shop sizes that are possible on Morris Avenue, and they would be good co-tenants for gift/card shops, cafés, and full-service restaurants.

Syndicated data also revealed unmet demand for grocery: $16.9 million within five miles. That is not enough to support a large supermarket, but it would be sufficient for a small grocer of 10,000 to 20,000 SF. A supermarket would not be an appropriate addition to a walkable downtown district that Morris Avenue hopes to become; however, a specialty grocery could fit well into that mix. Trader Joe is a distinctive grocery with a 10,000 SF footprint; however, there are already Trader Joe stores in Millburn and Westfield. Springfield could do well to attract a distinctive ethnic grocer, with imported food specialties. Eden Gourmet is an example of that type of grocery, and it would be supported in a walkable downtown environment (they can be now found in downtown South Orange, Hoboken, Manhattan and Brooklyn).

There was significant unmet demand for building supplies/garden, but this was not a category that was expressed as a preference in the survey. Moreover, most variations of store within this category would not fit well with the Morris Avenue downtown that would include a restaurant row, specialty gift and clothing boutiques, and a specialty grocery. However, it might be possible to identify a local version of "Restoration Hardware" that would be attracted by the unmet demand in this category, and the affluence of the Springfield marketplace. That type of vendor could be accommodated within your vision of a new Morris Avenue downtown.

Findings & Conclusions

Consensus for Change

Of the 941 respondents to the consumer survey, only 2 percent of them agreed with the statement: "Make no changes. Springfield is fine as it is." An overwhelming 98 percent of the respondents would prefer to see changes that improve the Township's shopping districts. This is a clear consensus of support for any measures that the Township or the BID would seek to undertake that would be consistent with the desires expressed in the survey. Certainly, the Township's plan to redevelop the central portion of Morris Avenue is consistent with the responses we received in the survey. (The strategic recommendations that we offer to the BID in the final section of this report are also consistent with expressed consumer desires, where those are compatible with the economic opportunities found in our market analysis.)

Redevelopment/Retail Recruitment

When asked what is most important to accomplish in Springfield, the top choice (85%) was to attract new retail businesses to Springfield. A close second (78%) was to revitalize storefronts / facades. *Shoppers* and *Non-shoppers* alike agreed that they don't like the current retail mix and they don't like the setting for shopping in Springfield. (Fewer than half of all respondents expressed that existing stores should be retained—another strong indication that there is much room for improvement.)

The fact that *Non-shoppers* were much more emphatic[6] on these points than *Shoppers* tells us that these are primary reasons for not shopping there now. The Township's plan to redevelop the downtown Morris Avenue area squarely addresses their concern for more attractive storefronts.

[6] 89% of *Non-shoppers* said the attraction of new business was important vs. 81% of *Shoppers*; 82% of *Non-shoppers* said that revitalization of storefronts was important, vs. 77% of *Shoppers*.

Moreover, if the Township implements a proactive retail recruitment program as recommended in our Strategies section, it will be addressing their first concern of attracting new businesses (and ensuring that the retail mix is more balanced and effective).

Marketing

Seventy-six percent (76%) of all respondents expressed that it is important for Springfield to attract more shoppers to its business districts. Sixty-seven percent (67%) urged the importance of marketing Springfield as a destination for shopping and dining. Given these results, the fact that so few outsiders participated in the consumer survey, and that so many merchants indicated that they do not engage in more than minimal marketing efforts, we found that there is insufficient awareness of Springfield's shopping and dining opportunities in the wider region. Apart from the local interest news stories in the *Springfield Patriot* and *Patch*, there is little promotion of the Springfield BID, or of Springfield itself as a shopping and dining district. Neither the BID nor many of the retailers in the district have a website, or participate in social media (Facebook, Twitter, etc.) promotion. We conclude from this that current marketing is inadequate or inappropriate to benefit Springfield retail, and this represents an opportunity for the BID to take a leadership role to implement a comprehensive marketing program for the retailers of the district.

Further, survey data established that shoppers want to see a better mix of retail in Springfield, and the Township is proposing to redevelop parts of the Morris Avenue downtown retail corridor. A proactive program of retailer, investor and developer recruitment is warranted, and this requires a targeted marketing component that would also be appropriate for the BID.

Office Space

Our analysis of commercial space in Springfield disclosed a much higher vacancy rate (about 25%) in the office space on Morris Avenue than in the retail space throughout town. Certain office uses—particularly professional services—would attract clients who are potential shoppers. More fully occupied office space with any use, however, would provide significant support to the retail community. It would place more potential consumers (the office workers themselves) in the district, boost demand for meals in the local restaurants, and enhance the sense of security by providing more "eyes on the street".

Parking

Although a significant issue for survey respondents, parking issues did not rank as highly as retail mix and appearance issues. Only 61 percent of all survey respondents said that it was important to provide more public parking on downtown Morris Avenue. (We singled-out Morris, as all of the stores of Route 22 and most of those on Mountain Avenue have private, on-site parking.) Parking for downtown Morris Avenue is an issue that needs to be addressed, but it does not take precedence over achievement of a more appealing, effective retail mix, or of addressing the poor appearance of the downtown.

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Strategic Recommendations

1. Morris Avenue: Redevelopment of Morris Avenue downtown area

a. **Re-build infrastructure to accommodate pedestrians; allow more residential density; capture share of vehicular traffic; address flood plain requirements to create:**

- Walkable downtown retail district
- Modern retail space
- A link to Mountain Avenue
- Public space for events

Morris Avenue is the heart of Springfield and the only available space that can serve as a walkable downtown retail destination. In its current form, retail offerings and space are limited, high traffic volume and narrow sidewalks discourage pedestrian activity, and parking is limited to on-street parking and a small number of public spaces in an off-street lot. Fortunately, this area has already been designated as an are in need of redevelopment so that it may be re-shaped into a more effective business and residential district.

To create a viable retail corridor that attracts shoppers from Springfield and beyond, redevelopment is needed to improve the retail infrastructure and meet the needs of modern retailers. An important goal of redevelopment should be to create additional retail space at grade; there is not enough there today to support a retail mix that can act as a destination for visitors.

To take advantage of any opportunities to create more viable retail space, this redevelopment zone should include the parcels one block north and south of Morris Avenue.

Redevelopment efforts should focus on creating modern retailing space that better accommodates the needs of retailers, restaurants, and retail services. This includes widening storefront spaces, ensuring that there is adequate backroom or kitchen space for modern operations, and providing the infrastructure to meet modern power requirements, Internet connections, and ventilation. Ensuring that ventilation, HVAC ducts, kitchen space, drainage, and fire suppression are feasible in retail space is imperative to creating a restaurant row.

There is the opportunity to create above-grade (above street level) market-rate residential apartments for sale and rental. Buildings that have existing upper floors suitable for residential space should rehabilitate as needed, and upgrade where possible to include amenities such as private parking (where lots are available to the rear of storefronts), modern kitchens, and central air and heat. The attraction of affluent residents meets several goals of mixed-use development by creating a built-in shopper audience for improved retail offerings, offsetting long-term cost of redevelopment or rehabilitation of the commercial space at grade by supplementing their revenue with residential rents, and providing constant "eyes on the street" to enhance safety and security.

We recommend building heights of at least three stories, with retail space at-grade and two floors of residential space above. Three story buildings will enhance the sense of enclosure that creates a comforting downtown environment for pedestrians, while providing ample space for residential living. We note that three-story buildings require elevator service under the Americans with Disabilities Act, and the additional cost of this feature may warrant even taller construction to justify that cost. Mid-rise buildings of up to six stories would not be inconsistent with other office buildings on Morris Avenue.

In addition to redevelopment of existing buildings, the streetscape and roadway of Morris Avenue will need to be altered to meet the needs of a downtown, walkable retail corridor. Sidewalks should be widened to accommodate a greater number of pedestrians and amenities such as benches, bus stops, and waste receptacles. Further streetscaping should include the addition of planters, flowerbeds, and other decorative amenities. Shade trees need to be selected with the assistance of an arborist or landscape architect who can ensure that trees will not obscure signage or view of the sidewalk from upper floors.

These changes will necessarily affect the traffic currently present on Morris Avenue. The goal of creating a walkable, retail corridor requires traffic calming measures to reduce both the volume of traffic here, as well as the speed with which it moves. Widening the sidewalks will have an effect of narrowing the roadway, and corner bump-outs can add to the "friction" to slow traffic. On-street parking should be maintained, but reoriented to back-in angle parking. Studies reflect that such parking is the safest parking for motorists, creates many more spaces than traditional parallel parking, and has the dual benefits of calming traffic while creating a sense of enclosure and a barrier between pedestrians and automotive traffic.

The most important focus should be at the intersection of Mountain Avenue and Morris Avenue. This intersection is confusing and dangerous for both pedestrians and motorists, and poorly-serves the downtown as a gateway entrance to its offerings. Creation of a traffic roundabout will calm traffic heading into the downtown area, allow for a more constant and consistent traffic flow, and announce entry into the business district. It would also provide space for the installation of public art, possibly to celebrate the history of Springfield's role in the Revolutionary War, or to create some new feature that helps to brand the downtown. Changes to the streetscape here will help facilitate the linking of Mountain Avenue to Morris' retail corridor.

All of these efforts will require the work of Springfield's elected leadership, civil officials, and the Springfield BID to forge partnerships with the stakeholders of the community. Property and business owners will have to be enrolled in the efforts to improve their buildings and minimize disruption on their businesses; developers will be needed to partner with the township and implement their vision; Union County will need to approve and facilitate changes to Morris Avenue, which is a county route.

The importance of efforts to engage and enroll these groups in the long-term strategy for the revitalization of Morris Avenue cannot be overstated. Without their assistance—or worse, facing their objections—the likelihood of success decreases dramatically. However, this report provides a guide for why these efforts are needed in the form of our Consumer Survey and market analysis. There is community support for this vision of Morris Avenue, and space for the BID and township to be leaders in the revitalization efforts.

Support for redevelopment efforts seems to be strong within the community. Recent meetings of the BID, elected officials, and the business community show there is consensus and excitement for the prospect of downtown redevelopment. The Board of Directors of the Springfield BID took the first step towards making redevelopment a reality in September of this year, when they signed an agreement to retain McManimon, Scotland & Baumann of Roseland, NJ, to serve as Redevelopment Counsel.

Key action-items for redevelopment of Morris Avenue:

- Create a Redevelopment Plan outlining objectives and goals
- Designate a redevelopment zone along Morris Avenue
- Partner with a developer who understands the vision and goals
- Continue to enroll business and property owners in the redevelopment process

- Work with NJ Department of Transportation to address the needs of redevelopment on State Route 82/Morris Avenue

b. Increase footprint: Link Morris and Mountain Avenues; extend Morris

There is insufficient retail space on Morris Avenue to allow for the density of stores and restaurants to support a destination retail center. Further, the configuration of current retail space on Morris Avenue is inadequate for contemporary retailers. Redevelopment affords the opportunity to reconfigure and expand this space.

To address both the limitations of shopping area and configuration of the buildings, we recommend a long-term plan to redevelop the current Morris Avenue redevelopment area and, in a second phase, to expand that area west of Caldwell Place along the south side of Morris Avenue, and east of Mountain Avenue to Springfield Avenue. Typical minimum mass of destination retail centers is approximately 250,000 square feet of gross leasable area (GLA) in order to have sufficient space to host a sufficient variety of retail stores to act as a destination for shopping. The redevelopment area could also include the west side of Mountain Avenue from Morris Avenue to Hannah Street (covering the Public Works Building and public parking lot). In addition to providing more space for new retail infrastructure, this might allow for the creation of a public green space for public gatherings, celebrations, and as a site to host public events.

View of Morris Avenue in downtown Springfield

Morris Avenue is a State highway (Route 82), and we recommend working with the NJ Department of Transportation to address the issues of traffic calming and

sidewalk widening would begin to make the corridor more pedestrian friendly, as well as offer restaurants and stores the opportunity to use the sidewalk for events. Such events could grow foot traffic with sidewalk dining, sales, and public events.

c. Cluster destination businesses and entertainment uses here

Of the four commercial zones (Morris downtown; Morris east and west of downtown; Mountain; and Route 22) that we examined in Springfield, only Morris downtown has the capacity to attract and capture the business of outside visitors. Redevelopment of this area is essential to create an effective retail infrastructure with wider, safer sidewalks; attractive appearance; and more retail space than currently exists in order to accommodate the additional restaurants and merchants needed for a more effective retail mix. As much as possible, the businesses of Morris Avenue downtown should be destination businesses with the power to attract visitors from the wider region (like more full-service restaurants and the fashion designer now present there). Neighborhood-oriented retailers (such as dry-cleaners and convenience stores) should be located along Mountain Avenue, where there is easy access to local residents. Public events and entertainment uses should be arranged as much as possible in the Morris Avenue downtown area, to stimulate trial visits by outsiders, to help to mask the retail void while you recruit the additional stores and restaurants necessary to provide the desired retail mix, and to support the restaurant cluster there.

d. Create and implement a design standard to foster district identity

The local zoning ordinance should include an enforceable design standard for commercial buildings, with specific façade requirements for each commercial zone in the Township. The Route 22 highway commercial zone does not require as much definition, as the national and regional retailers that choose to locate there have corporate guidelines that they will want to follow. However, the neighborhood-commercial area of Mountain Avenue should have a design standard that is consistent with neighborhood retail and

harmonious with local residences. The downtown commercial area on Morris Avenue should also be regulated to have a distinctive appearance that would be appropriate for the destination retailers and restaurants we believe ought to be located there, and consistent with the old-town charm that is evocative of Springfield Township. The design standard should address commercial signage to ensure that sign styles needed for successful retailing are permitted (including "blade" signs that are mounted perpendicular to the façade); that transparency (visibility into the store through the display window) is promoted, and that the role of the current Design Review Committee be expanded to review applications in commercial zones for façade and sign improvements.

Examples of "blade" signs in downtown shopping district.

e. Gateway, directional, and pedestrian signage needed

Gateway signs at major entranceways create a sense of "arrival" and help to create a "sense of place" for the community, but particularly for the business district. Springfield's current signs do not properly announce the business district or convey the senses of "arrival" or "place". The Morris Avenue downtown area needs to be announced to the thousands of visitors that stream through everyday, so that they understand that it is a place to stop, shop, socialize, and dine. The installation of appropriate, permanent gateway signage should be planned as a part of the redevelopment of this area, and may include (subject to pertinent approvals) an archway or horizontal band across Morris Avenue at each end of the Morris Avenue redevelopment area, or some other similarly prominent and attractive design that will be consistent with the building style of the redevelopment, and with the intended brand of the district.

Directional signs are needed to guide non-resident visitors from major roadways into the Morris Avenue downtown, and guide residents to the Mountain Avenue neighborhood shopping area. Once in these areas, other directional signs should guide the visitor to key features of each district (parking, municipal building, library, post office, restaurants, shops, historic sites, etc.).

Example of "directional" signage

Pedestrian signage is needed to guide visitors on foot to the shopping and dining venues in the downtown district. Kiosks installed in the downtown area will serve to promote the various options available to the shopper, encourage them to try more than the store or restaurant that they had in mind, and to walk the corridor.

f. Create/implement a comprehensive recruitment program

As the retail infrastructure is improved upon, a proactive recruitment campaign should be undertaken to help create an appealing retail mix. Building on the unique restaurant offerings already present, we recommend the creation of a restaurant row. Independent restaurants could attract an audience with unique offerings that differentiate themselves from nearby chain restaurants at area malls and along Route 22.

- We propose a unified recruitment strategy for all of Springfield
  - Morris Avenue: restaurant offerings to create a "restaurant row" and destination retail goods
  - Route 22: recruit missing nationals; avoid competition with Morris Avenue merchants
  - Mountain Avenue: recruit missing neighborhood retail goods and services

- Offer recruitment assistance to retail and office property owners throughout Springfield as a benefit of BID membership

Retail recruitment is an important service that a BID can offer to assist its ratepayers in being successful, and, in a difficult business environment, can provide significant benefit to BID members. Moreover, it provides the benefit to the municipality and BID of having a voice and role in guiding the retail mix to attract the desired consumer audience.

Since the most viable space for the creation of a downtown shopping district is on Morris Avenue, recruitment efforts should focus on attracting the retail operators needed to create a successful retail corridor within the redeveloped space. Market analysis and survey results both suggest that the most sustainable retail corridor component would be the creation of a restaurant row, together with destination-retailers of distinctive goods and services. (Destination retailers are those that rely on a regional consumer base and would be attracted by the convenient regional access and high car counts of Morris Avenue.)

Recruiting restaurants can be more challenging than recruiting traditional retail store operators. To be effective in a distinctive local retail market, the focus of recruitment efforts should be placed on recruiting independent restaurateurs who have a proven track record of success, rather than recruiting franchise operators that are common to most malls and shopping centers. Encouraging your existing successful restaurateurs to develop new concepts and open new locations on Morris Avenue will help craft a unique mix of established restaurants that are known entities as well as new restaurants that trade on the name of past successes of their chefs and owners.

To attract such restaurant operators and destination retailers, we recommend a targeted recruitment effort with direct mail messages aimed at specific prospects. The effort would rely upon specialized prospect lists and appealing marketing materials to attract

attention and generate interest in the redevelopment project, and business opportunities there. Once prospect lists have been created, targeted mailings over a period of six months will attract the attention of prospect businesses, and get them to visit Springfield's website for more information, and ultimately, to visit Springfield itself.

Additional categories for recruitment should include unique and boutique retail offerings in categories such as hobby, toys and games; clothing of all types; specialty grocery; and candy store. The most important focus for these recruitment efforts should be to avoid competition with offerings in nearby Westfield, the Mall at Short Hills and Livingston Mall. Unique offerings create unique experience that would attract customers from throughout the region.

Retail recruitment efforts focus on not just promoting specific vacant properties that are available for purchase or lease, but the entire community and retail corridor, focusing on unmet demand that can be tapped, attractive demographics of the consumer audience, as well as benefits and amenities of prospective locations. However, by partnering with real estate brokers and property owners/managers, the same information can include specific properties that are looking for tenants. The potential benefits of the program make for a powerful incentive to property owners to partner with the BID and the municipality, and afford the BID an opportunity to guide the retail mix, as opposed to watching it develop haphazardly.

Beyond Morris Avenue downtown, recruitment efforts should focus on recruitment of office users. We propose that the BID consider the clustering of service providers of a single class, such as medical practitioners and specialists, public accountants, tax preparers, or attorneys, in order to have office uses that attract visitors, and serve as a local destination for that use category.

Key action-items for recruitment efforts:

- Create a "brand" for Springfield and Morris Avenue.
- Work with JGSC Group to develop prospect lists of pre-qualified retail and commercial prospects.
- Develop a marketing campaign that includes positive PR, mailings, and a robust internet presence.
- Work with property owners to promote the recruitment program and encourage their participation.

2. Mountain Avenue

a. Cluster most neighborhood retail goods and services here

This is where locals go to pay tax bills, visit the post office, drop off dry-cleaning, and do convenience shopping. It is rare to find destination retail goods businesses here (although one new business, "Hobbies and Airsoft," is clearly a destination that will rely on patronage from beyond the town of Springfield), and there are a few professionals who attract patients/clients from outside of town. By and large, this is the location of neighborhood retail, and we recommend that this pattern continue.

b. Create and implement a design standard to foster district identity

As Mountain Avenue is largely a residential district, it is particularly important that the commercial buildings here maintain an appearance that is compatible with the adjacent residential community. Neighborhood retailing pursues different objectives than destination retailing, and these do not require the signage or styles needed to capture the attention of first-time visitors. A design standard that promotes an appealing commercial appearance here will not only support good retailing, but it will reserve values in the residential zone around it.

3. Route 22:

a. Participate in retail recruitment, to avoid competition for Morris Avenue

The Route 22 has long been a successful retail corridor that has not needed management support from the local towns that it passes through. The corridor has high vehicle traffic that has been a draw for major national and regional retailers for over 50 years. It would be in Springfield's best interest, however, to take a proactive role in the recruitment of retailers for vacancies in Springfield's portion of this corridor, both to maintain full occupancy (preserving high real estate tax values), and to prevent the arrival of a retailer that would pose a competitive disadvantage to smaller retailers that the town attempts to cultivate on Morris Avenue.

b. Cluster major national/regional businesses, auto-oriented users, and other large space users here

Large-space retail users like big-box retailers can be accommodated on Route 22, not on Morris or Mountain Avenues. As more big-box or other large-space retailers seek to locate in the area, they should be recruited to this corridor. Shopping centers are more appropriately developed here, and should not be developed on Morris or Mountain.

To the extent that the Township accepts the recommendations of this report, and chooses to redevelop Morris Avenue as a traditional, walkable retail corridor with distinctive shops, then franchise businesses should be avoided on Morris in favor of locating them on Route 22. Auto-oriented businesses (with driveways, on-site parking, or drive-through features) should be limited to the Route 22 corridor.

c. Enforce building code to maintain appearance

For the most part, the businesses of Route 22 are corporate franchises and are required to maintain a certain appearance in keeping with the obligations of their franchise agreement. However, we observed several businesses on the corridor that are poorly

maintained or even neglected, and their appearance can have a negative impact on commerce in the corridor. Although we recognize that design and sign standards are less stringent in the Highway-Commerce zone (the Route 22 corridor), we believe that there are conditions that could be improved with a program of warning notice followed by code enforcement.

4. GENERAL:

a. Build/maintain relationships with property owners in all districts

Unlike a mall or shopping center, most commerce[7] on Morris, Mountain, and Route 22 is operated in individual properties, each owned by an independent owner. To achieve improvements in building appearance, participation in retail recruitment efforts, support for events, and more, it is necessary to build the support and cooperation of those property owners. They all have different goals in their property ownership: most want to build value, but many are not as interested in taking action that will cause value to build. We believe that it is necessary to build trust through long-term relationships. We believe that the hard economic data that we have provided in this report, together with the unvarnished responses of the consumers of your Trade Area offer you a solid foundation of information with which to make overtures to those property owners of the need for improvement and the value of their participation in the effort. That we have also provided you with a set of strategic recommendations to achieve specific goals that are designed to revitalize commerce in Springfield should also make for more compelling arguments to offer the owners. We encourage the BID to arrange for a meeting with commercial property owners (and merchants) to share this.

[7] Obviously, we exclude the stores of Echo Plaza Shopping Center, and the General Green Shopping Center.

b. Ongoing retail recruitment for a more effective retail mix; reduce vacancies

We have discussed above, the features of a retail-recruiting program as a means to proactively manage the mix of retail that you have and to keep the level of vacancy down. Here, we are emphasizing that the retail recruitment program should be an ongoing effort; it can change, but it never ceases. The effort must change as it produces results: your retail mix will always be in flux, and vacancies will always occur for a variety of reasons. A permanent recruiting capacity is a way to exercise management control over that dynamic.

c. Business Retention

i. Destination Marketing/Branding

We recommend that the focus of the BID's marketing should be to:

- Create a website for the BID that links with the websites of retailers in Springfield, and provides information for shoppers (business directory, map, event info, sales info, etc.) as well as for retailers (with economic data from this report emphasizing advantages of retailing in Springfield, data on unmet demand in sustainable retail categories for Springfield, and up-to-date information on commercial vacancies available for sale or lease in town).
- Target the recruitment of retailers, investors, and developers to create an appropriate mixed-use environment on Morris Avenue based on destination retail and full-service restaurants.
- Prior to redevelopment and attraction of new retail stores, target existing shoppers to stimulate more frequent visits/more stores per visit (as the extreme-couponing events do), rather than reaching outside of the trade area for new shoppers.

- Continue to develop and promote additional events (building on the success of the car show) to directly benefit business; however, seek to hold these events on or near Morris Avenue, utilize only Springfield food vendors; and engage other merchant participation, even if only through their distribution of bounce-back coupons. (Bounce-back coupons encourage the recipient to return to the merchant's store on a later date, one or two weeks after the event, to obtain a particular discount or other benefit.)
- Promote shopping in Springfield during the major shopping seasons of the year (Valentine's Day, Mother's & Father's Days, graduation, back-to-school, and Christmas holiday) with internet and email blasts. Some merchants maintain data about their customers. This presents an opportunity to the district to request to share this customer data in order to direct market the district. Email and direct-mail campaigns promoting district functions (like the car show) or special sales events could be effective and low-cost ways to reach known shoppers and get them to frequent more of Springfield's stores/restaurants more frequently.
- Recruit office space users with a targeted recruitment program designed to fill vacant office space on Morris Avenue.
- Create a branding program to promote the redeveloped Morris Avenue as a shopping and dining destination specifically, and to enhance sales for all retailers (including Mountain Avenue and Route 22), generally.

ii. Increase foot traffic on Morris and Mountain Avenue corridors

It will take months, and possibly years to achieve real change in your retail mix, and then to promote that change to the non-shopping public that is not now shopping or dining there. In the meantime, we recommend two strategies to attract and build your shopper audience:

Events: The annual car show has been a successful way to attract outsiders and residents to gather in Springfield in great numbers, and to develop a positive impression about visiting the town. We recommend that the Township and the BID develop more events in an effort to keep visitors coming back to Springfield on a regular basis. To be helpful to your merchants, those events should be staged on or near the Morris Avenue downtown area, where visitors may be encouraged to visit your stores while also participating in the event. We suggest these caveats:

- Merchants should be encouraged to participate, ideally with free access to booths/tables/tents.
- Those local merchants that do not have goods or services to sell at the event should be encouraged to participate with coupons.
- Visitors to the event should be encouraged to register (in return for a free gift, like a T-shirt, shopping bag, or similar item that is carries the district brand) so that the district may capture names, full addresses or zip codes, and most importantly, email addresses.
- Street closures are good to promote more pedestrian comfort, but all booths should be oriented toward the stores/sidewalks, and not to the center of the street.
- To the maximum extent possible, all food and drink vendors at your events should be local, so that the event is benefiting local vendors rather than taking business away from them.

- Banners over Morris Avenue should promote the upcoming event in the preceding week (i.e., "Holiday Craft Fair this Saturday!").
- Arrange for multiple events that target different consumer audiences, to build broad exposure for downtown Springfield (i.e., events for young families, for seniors, for young singles, for athletic groups, for readers, etc.).
- Seek to attract sponsored events, so that the cost and some of the labor associated with running the event may be borne by third parties (i.e., soft drink companies and energy bar vendors to sponsor bike races, etc.).

Promotions: Contests can be low-cost ways to increase shopper visits to your existing stores and restaurants, while capturing email addresses of potential consumers, and building good will for Springfield. The BID could assume or share with participating merchants the costs of prizes, contest materials, and contest promotion. (For example, a sweepstakes contest can offer attractive prizes for just the requirement of filling out an entry blank in participating stores—with $100 per store from just 50 stores, the prize value may be $5,000.

After the redevelop has been achieved, and new retailers and restaurants have been recruited, the branding and marketing program described earlier will then become the BID's priority mechanism for increasing foot traffic and shopper visits to Springfield.

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Closing Summary

In sum, we want to emphasize that the single most significant finding of our assessment has been the clear opportunity for retail business growth to occur through better appeal to your local market. Springfield is a community of affluent residents who, for the most part, have decided not to shop or dine in town. They have significant discretionary spending capacity, and they are deciding to leave town with their dollars and purchase retail goods and services elsewhere.

Your residents have taken the time and trouble to tell us why they choose not to spend their money in town. They have told us what it is that would get them to stay here when spending those dollars. More than anything, there is strong consensus for change: 98% of the respondents disagreed with the statement "Change nothing; Springfield is fine as it is." It is now important for the Township and the BID to regard the message sent through these survey responses, and respond with desired action.

JGSC Group has laid out a carefully considered set of strategies that addresses your residents' concerns, while conforming to what your local economy can sustain, and utilizing the retail infrastructure that exists (or must be built) to support it. Our strategies will allow Springfield to make a more effective retail destination in the proposed Morris Avenue downtown redevelopment; to re-direct neighborhood-oriented businesses to the Mountain Avenue corridor; to recruit office users to the vacant office spaces in the non-downtown portions of Morris Avenue; and to work cooperatively with commercial property owners along Route 22 to ensure that their retail tenant recruitment does not conflict with the town's goals to create a distinctive destination on downtown Morris Avenue.

This is our prescription for the revitalization of Springfield's local economy. We stand ready to assist the BID and/or the Township further in the implementation of these strategies, should you desire. Thank you for inviting us to perform this Community Insights™ assessment for you.

Appendix A

Consumer Survey Form & Results

SPRINGFIELD COMMUNITY PARTNERSHIP MANAGEMENT CORP.

BUSINESS IMPROVEMENT DISTRICT

TELL US WHAT YOU WANT IN SPRINGFIELD.

COMPLETE THIS FORM **OR** TAKE THE SURVEY ONLINE AT

www.SpringfieldSurvey.com

1. In what zip code do you reside? _____

2. The Springfield Community Partnership is working on revitalizing and improving our business districts. Please rate the importance of accomplishing the following:

	VERY Important	SOMEWHAT Important	NOT Important
a. Actively pursue revitalization of storefronts & building façades in our business districts	❑	❑	❑
b. Attract new retail businesses to Springfield	❑	❑	❑
c. Attract more dining establishments to Springfield	❑	❑	❑
d. Focus efforts on retention of existing businesses	❑	❑	❑
e. Attract more shoppers to Springfield's business districts	❑	❑	❑
f. Actively market Springfield as a shopping/dining destination	❑	❑	❑
g. Create a browse-shopping atmosphere on **downtown** Morris Avenue	❑	❑	❑
h. Provide more public parking spaces on **downtown** Morris Avenue	❑	❑	❑
i. Make no changes. Springfield is fine the way it is.	❑ Agree	❑ Disagree	

We'd like to know which new businesses you would like to have in Springfield. Please name…

3. TWO specific restaurants or types of eating and drinking places that you'd like to have in Springfield:

a. _____ b. _____

4. TWO retail stores or types of businesses that you'd like to have in Springfield:

a. _____ b. _____

5. TWO types of arts or entertainment/leisure businesses that should be offered in Springfield:

a. _____ b. _____

6. Besides stores, restaurants and entertainment, what OTHER CHANGES would make Springfield more appealing?

a. _____ b. _____

7. When you visit the stores, restaurants or businesses in the following areas, is adequate parking available?

	ALWAYS	USUALLY	SOMETIMES	RARELY	NEVER
a. Downtown Morris Avenue	❑	❑	❑	❑	❑
b. Mountain Avenue	❑	❑	❑	❑	❑

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Please continue ☞

8. Please rate your overall level of satisfaction with the following in each of these business districts:

	Downtown Morris Ave			Morris Ave. near Short Hills			Mountain Ave.			Route 22		
	GOOD	FAIR	POOR	GOOD	FAIR	POOR	GOOD	FAIR	POOR	GOOD	FAIR	POOR
a. Outside appearance of stores and businesses	❑	❑	❑	❑	❑	❑	❑	❑	❑	❑	❑	❑
b. Streetscapes (trees, planters, lighting, benches, etc.)	❑	❑	❑	❑	❑	❑	❑	❑	❑	❑	❑	❑
d. Variety of businesses	❑	❑	❑	❑	❑	❑	❑	❑	❑	❑	❑	❑
e. Quality of merchandise / products / services	❑	❑	❑	❑	❑	❑	❑	❑	❑	❑	❑	❑
f. Selection and quality of eating places	❑	❑	❑	❑	❑	❑	❑	❑	❑	❑	❑	❑
g. Convenient parking	❑	❑	❑	❑	❑	❑	❑	❑	❑	❑	❑	❑
h. Smoothness of traffic flow	❑	❑	❑	❑	❑	❑	❑	❑	❑	❑	❑	❑
i. Pedestrian safety / crosswalks	❑	❑	❑	❑	❑	❑	❑	❑	❑	❑	❑	❑
j. Cleanliness of streets / sidewalks / parking areas	❑	❑	❑	❑	❑	❑	❑	❑	❑	❑	❑	❑

9. Of all the places to shop or dine in the region, what is your favorite?

_____

10. During a typical MONTH, about how many times do you engage in the following activities, and about how much money do you usually spend PER VISIT?

	VISITS PER MONTH	TYPICAL $ SPENT PER VISIT
a. Dine at restaurants or eateries in Springfield	_____	$ _____
b. Dine at restaurants or eateries other than in Springfield	_____	$ _____
c. Shop at stores in Springfield (**EXCLUDING** grocery shopping)	_____	$ _____
d. Shop in all other areas (**EXCLUDING** grocery shopping)	_____	$ _____

11. About how often do you…

	DAILY	A FEW TIMES PER WEEK	SEVERAL TIMES PER MONTH	ABOUT ONCE A MONTH OR LESS
a. use the Jitney transportation service in Springfield?	❑	❑	❑	❑
b. use NJ Transit buses to access shopping and/or dining in Springfield?	❑	❑	❑	❑

12. Do you support measures to calm vehicular traffic along downtown Morris Avenue, and make the area more walkable and pedestrian friendly? ❑ Yes ❑ No

13. Would you shop, dine, and utilize services in Springfield more often if more of the following types of stores, eating places, and services were offered?

	YES	MAYBE	NO
a. Casual, full-service (table service) restaurants	❑	❑	❑
b. Fine (upscale) dining	❑	❑	❑
c. Outdoor dining / sidewalk cafés	❑	❑	❑
d. Delicatessens, sandwich shops	❑	❑	❑
e. Coffee shops / cafés	❑	❑	❑
f. Ethnic / specialty food stores	❑	❑	❑
g. Health club / fitness center	❑	❑	❑
h. Party supplies	❑	❑	❑
i. ATMs (cash machines)	❑	❑	❑
j. Dentists, dental services	❑	❑	❑
k. Family / general practice doctors	❑	❑	❑
l. Optical goods / eye care	❑	❑	❑

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14. Which of the following are the PRIMARY reasons that you come to each of the shopping districts in Springfield?

	Downtown Morris Ave.	Morris Ave. near Short Hills	Mountain Ave.	Route 22
a. Visit the stores / shops	❑	❑	❑	❑
b. Go to the eating and/or drinking places	❑	❑	❑	❑
c. Personal business or medical appointment	❑	❑	❑	❑
d. Meet friends and socialize	❑	❑	❑	❑
e. I live there	❑	❑	❑	❑
f. I work there	❑	❑	❑	❑
g. Other (specify): _____	❑	❑	❑	❑

15. Which of the following are the MAIN REASONS that you DO NOT visit each of the districts more often? *[Check only the **most** important reasons.]*

	Downtown Morris Ave.	Morris Ave. near Short Hills	Mountain Ave.	Route 22
a. Too few stores or places to shop	❑	❑	❑	❑
b. Too few eating places	❑	❑	❑	❑
c. Traffic congestion	❑	❑	❑	❑
d. Selection / quality of merchandise / stores	❑	❑	❑	❑
e. Store hours are uncertain or inconvenient	❑	❑	❑	❑
f. Parking	❑	❑	❑	❑
g. Other (specify):	❑	❑	❑	❑

16. What types of goods or services are most difficult to find in the area?

_____

17. Which of the following Springfield events do you attend?

[1]❑ Memorial Day Parade
[2]❑ Farmers Market
[3]❑ Fourth of July events
[4]❑ Summer Concert
[5]❑ Fall for Springfield Festival & Car Show

18. Please rate your sense of security…

	VERY SECURE	SOMEWHAT SECURE	SOMEWHAT INSECURE	VERY INSECURE
a. in your home neighborhood	❑	❑	❑	❑
b. when visiting Mountain Avenue for shopping or dining	❑	❑	❑	❑
c. when visiting Route 22 in Springfield for shopping or dining	❑	❑	❑	❑
d. when visiting **downtown** Morris Avenue in Springfield for shopping/dining	❑	❑	❑	❑
e. when visiting Morris Ave. near Short Hills for shopping or dining	❑	❑	❑	❑
f. while attending community events in Springfield	❑	❑	❑	❑
g. while waiting at bus stops in Springfield	❑	❑	❑	❑

19. Which of the following media sources are MOST useful to you when deciding where to shop, dine, or purchase goods or services? *[Check those that are MOST useful.]*

[1]❑ Company or store websites
[2]❑ Direct mail materials
[3]❑ Email and/or text alerts
[4]❑ Newspapers
[5]❑ Radio
[6]❑ Smartphone apps
[7]❑ Social media (Facebook, Twitter, etc.)
[8]❑ Television
[9]❑ Recommendations by family / friends

20. How valuable are each of the following when you are looking for new places to shop, dine, or learn about sales, promotions, events, activities, etc.

	VERY Valuable	SOMEWHAT Valuable	NOT Valuable		VERY Valuable	SOMEWHAT Valuable	NOT Valuable
a. Google	❑	❑	❑	f. Urban Spoon app	❑	❑	❑
b. Facebook	❑	❑	❑	g. Craigslist	❑	❑	❑
c. Twitter	❑	❑	❑	h. *Springfield Patch*	❑	❑	❑
d. Yelp	❑	❑	❑	i. *Springfield Patriot*	❑	❑	❑
e. Groupon	❑	❑	❑	j. Other (specify): _____	❑	❑	❑

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Please continue ☞

21. What is your gender? [1]❑ Female [3]❑ Male

22. How many persons (including yourself) reside in your household?

a. # of adults (18 and over): _____ b. # of children (under 18): _____

23. Which of the following best describes your age group?

[1]❑ Under 18 [3]❑ 25 to 34 [5]❑ 45 to 54 [7]❑ 65 or older
[2]❑ 18 to 24 [4]❑ 35 to 44 [6]❑ 55 to 64

24. Which of the following best describes your total annual household income?

[1]❑ Less than $25,000 per year [4]❑ $50,000 to $74,999 per year [7]❑ $150,000 to $199,999 per year
[2]❑ $25,000 to $34,999 per year [5]❑ $75,000 to $99,999 per year [8]❑ $200,000 to $249,999 per year
[3]❑ $35,000 to $49,999 per year [6]❑ $100,000 to $149,999 per year [9]❑ $250,000 or more per year

Thank you for taking time to complete this survey! We value your participation.

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TELL US WHAT YOU WANT.

Complete this survey or take it online at
www.SpringfieldSurvey.com

The Springfield Business Improvement District is working to revitalize our shopping districts and recruit new businesses to the area. As part of this effort, we'd like to know what kind of stores, restaurants, and businesses we should recruit, and what other changes will make Springfield more appealing to you.

Please help us by taking a few minutes to share your opinions. If you live, work or shop anywhere in or near Springfield, we want to hear from you. Thank you.

BEFORE MAILING
FOLD YOUR SURVEY SO THE PANEL TO THE LEFT FACES OUT AND SEAL IT. USE TAPE ONLY, DO NOT STAPLE.

JGSC GROUP, LLC
POST OFFICE BOX 1148
MERCHANTVILLE, NJ 08109

PLACE STAMP HERE
Post Office Won't Deliver Without Postage

TELL US WHAT YOU WANT
Mail your survey response today

JGSC GROUP, LLC
Springfield Consumer Survey
Post Office Box 1148
Merchantville, New Jersey 08109

Completed Surveys	Count	Margin of Error
All Responses	941	3.3%
Non-shopper *(2 visits per month or less)*	493	4.5%
Shopper *(more than 2 visits per month)*	170	7.7%

Q1. Home zip code	All Responses (906)	Non-Shoppers (474)	Shoppers (166)
07016 – Cranford	1%	1%	1%
07033 – Kenilworth	0%	0%	1%
07081 – Springfield	91%	91%	93%
07083 – Union	2%	2%	3%
07090 – Westfield	1%	1%	0%
07092 – Mountainside	0%	0%	1%
07901 – Summit	1%	1%	0%
All others (35)	4%	3%	2%

Q2. Rate the importance of accomplishing… *(% "Very Important")*	All Responses (877)	Non-Shoppers (489)	Shoppers (170)
Attract new retail businesses to Springfield	85%	89%	81%
Revitalize storefronts / façades	78%	82%	77%
Attract more shoppers to business districts	76%	80%	76%
Create browse-shopping on downtown Morris Ave.	73%	76%	72%
Attract more dining establishments	68%	72%	62%
Market as a shopping/dining destination	67%	72%	64%
Provide more public parking on downtown Morris Ave.	61%	63%	64%
Retain existing businesses	47%	45%	51%
Springfield is fine as it is. *(% "Agree")*	2%	1%	1%

Q3. Restaurants wanted *(unprompted/categorized)*	All Responses (1,216)	Non-Shoppers (818)	Shoppers (288)
Coffee shops, Cafés	17%	18%	18%
Casual upscale, NES	8%	4%	2%
Casual family	8%	6%	5%
Casual upscale, american	8%	7%	8%
Delicatessans, sandwiches	6%	5%	8%
Diner	6%	5%	6%
Casual upscale, italian	5%	6%	5%
Casual upscale, mexican	5%	5%	5%
Fine dining	5%	6%	2%

Q3. Cont'd… Restaurants wanted *(unprompted/categorized)*	All Responses (1,216)	Non-Shoppers (818)	Shoppers (288)
Burgers	4%	4%	3%
Tavern, Pub, Sports Bar	4%	3%	5%
Steakhouse	4%	4%	3%
Bakery	3%	2%	5%
Ice cream, ices, yogurt	3%	2%	2%
Pizza	3%	2%	3%
Seafood	3%	3%	4%
All others	9%	16%	16%

Frequently named restaurants: Bonefish Grill, Charlie Brown's, Cheesecake Factory, Chilli's, Martini's Bistro, McDonald's, Panera Bread, PF Chang's, Rockin' Joes, Smashburger, Starbucks

Q4. Stores wanted *(unprompted/categorized)*	All Responses (885)	Non-Shoppers (548)	Shoppers (196)
Clothing (NES)	12%	13%	11%
Clothing (family)	12%	13%	8%
Clothing (juniors, misses, women)	11%	12%	10%
Grocery store / supermarket	8%	8%	9%
Gift Boutigues / Cards	7%	7%	9%
Clothing (children, infants)	5%	5%	3%
Baked Goods	4%	5%	4%
Department store	4%	4%	4%
Shoes	3%	3%	3%
Discount department store	3%	2%	5%
Art & craft supplies	2%	2%	4%
Specialty boutiques	2%	2%	2%
Sporting goods / camping equip. / fitness equip.	2%	2%	4%
Market (farm / produce / specialty)	2%	1%	3%
Movie theater	2%	2%	1%
All others (45)	21%	5%	21%

Frequently named retailers: Ann Taylor, Apple, Banana Republic,Children's Place, ***Dollar Store, Gap****, Hallmark, Kohl's, Marshall's, Old Navy,* ***Starbucks,*** *Trader Joe's, Victoria's Secret, Walmart, and Wegman's*

Q5. Entertainment wanted *(unprompted/categorized)*	All Responses (532)	Non-Shoppers (352)	Shoppers (117)
Movie theater	44%	47%	39%
Live music (cafés, jazz, outdoors, pub, venues)	11%	9%	18%
Bowling	7%	7%	6%
Performing arts	4%	4%	5%
Art Gallery	4%	3%	6%
Children's Activities	3%	3%	1%

Q5. Cont'd… Entertainment wanted *(unprompted/categorized)*	All Responses (532)	Non-Shoppers (352)	Shoppers (117)
Pubs	2%	2%	1%
Art classes / workshops	2%	2%	1%
Wine / Martini bar / Lounge	2%	3%	1%
Festivals	1%	1%	1%
Arts / Crafts	1%	2%	0%
Coffee Shop / Café	1%	2%	0%
Community / Rec Center	1%	1%	2%
All others (30)	16%	15%	20%

Frequently named retailers: Color Me Mine, Chuck E. Cheese

Q6. Other changes wanted *(unprompted/categorized)*	All Responses (1,240)	Non-Shoppers (801)	Shoppers (279)
Improve facades	15%	17%	13%
Better / walkable downtown area	12%	12%	10%
Aesthetics / appearance	8%	8%	10%
Athletic Fields	8%	2%	2%
Parking (more on Morris Avenue and at library)	7%	9%	5%
Cleanliness	6%	6%	5%
Improve sidewalks	3%	4%	2%
Traffic calming (Morris Avenue)	3%	2%	4%
Bus stops (fewer, eliminate)	2%	3%	2%
Lower Taxes	2%	2%	2%
Community garden	2%	2%	4%
Massage palors (close them)	2%	3%	1%
Landscaping / streetscaping	2%	2%	2%
Fill vacancies	2%	1%	4%
Outdoor dining	2%	2%	2%
Improve streets	1%	2%	1%
Redevelop Morris Avenue	1%	1%	3%
Community events	1%	2%	1%
All others (29)	25%	24%	25%

Q7a. Adequate parking: Downtown Morris Avenue	All Responses (745)	Non-Shoppers (459)	Shoppers (155)
Always	8%	9%	8%
Usually	34%	30%	41%
Sometimes	38%	39%	34%
Rarely	16%	18%	16%
Never	4%	5%	1%

Q7b. Adequate parking: Mountain Avenue	All Responses (736)	Non-Shoppers (456)	Shoppers (154)
Always	14%	14%	18%
Usually	44%	42%	48%
Sometimes	28%	30%	21%
Rarely	10%	11%	11%
Never	3%	3%	2%

Q8a. Outside appearance of stores/businesses	All Responses (791)	Non-Shoppers (492)	Shoppers (165)
Downtown Morris Ave: Good	5%	3%	6%
Downtown Morris Ave: Fair	25%	23%	23%
Downtown Morris Ave: Poor	70%	74%	71%
Morris Ave near Short Hills: Good	24%	21%	27%
Morris Ave near Short Hills: Fair	57%	57%	56%
Morris Ave near Short Hills: Poor	19%	21%	17%
Mountain Ave: Good	17%	14%	19%
Mountain Ave: Fair	61%	61%	61%
Mountain Ave: Poor	23%	25%	20%
Route 22: Good	28%	26%	30%
Route 22: Fair	52%	53%	49%
Route 22: Poor	20%	21%	21%

Q8b. Streetscapes (trees, planters, lights,benches, etc)	All Responses (789)	Non-Shoppers (490)	Shoppers (167)
Downtown Morris Ave: Good	7%	6%	8%
Downtown Morris Ave: Fair	31%	30%	28%
Downtown Morris Ave: Poor	62%	65%	64%
Morris Ave near Short Hills: Good	15%	13%	17%
Morris Ave near Short Hills: Fair	49%	49%	49%
Morris Ave near Short Hills: Poor	36%	38%	33%
Mountain Ave: Good	16%	14%	19%
Mountain Ave: Fair	54%	54%	54%
Mountain Ave: Poor	30%	32%	27%
Route 22: Good	11%	10%	15%
Route 22: Fair	40%	37%	40%
Route 22: Poor	49%	54%	45%

Q8c. Variety of businesses	All Responses (791)	Non-Shoppers (493)	Shoppers (167)
Downtown Morris Ave: Good	3%	2%	5%
Downtown Morris Ave: Fair	29%	26%	27%
Downtown Morris Ave: Poor	68%	72%	68%
Morris Ave near Short Hills: Good	12%	11%	14%
Morris Ave near Short Hills: Fair	53%	50%	58%
Morris Ave near Short Hills: Poor	35%	40%	28%
Mountain Ave: Good	10%	9%	12%
Mountain Ave: Fair	53%	49%	60%
Mountain Ave: Poor	37%	42%	28%
Route 22: Good	43%	38%	51%
Route 22: Fair	43%	46%	38%
Route 22: Poor	14%	16%	11%

Q8d. Quality of merchandise / products / services	All Responses (745)	Non-Shoppers (477)	Shoppers (164)
Downtown Morris Ave: Good	9%	6%	13%
Downtown Morris Ave: Fair	40%	36%	49%
Downtown Morris Ave: Poor	51%	57%	38%
Morris Ave near Short Hills: Good	21%	18%	33%
Morris Ave near Short Hills: Fair	56%	55%	54%
Morris Ave near Short Hills: Poor	23%	27%	13%
Mountain Ave: Good	18%	15%	24%
Mountain Ave: Fair	61%	60%	64%
Mountain Ave: Poor	21%	25%	12%
Route 22: Good	42%	39%	50%
Route 22: Fair	48%	50%	42%
Route 22: Poor	10%	11%	8%

Q8e. Selection and quality of eating places	All Responses (758)	Non-Shoppers (486)	Shoppers (164)
Downtown Morris Ave: Good	10%	10%	11%
Downtown Morris Ave: Fair	45%	40%	54%
Downtown Morris Ave: Poor	45%	50%	35%
Morris Ave near Short Hills: Good	7%	6%	9%
Morris Ave near Short Hills: Fair	42%	39%	50%
Morris Ave near Short Hills: Poor	50%	55%	40%
Mountain Ave: Good	9%	8%	12%
Mountain Ave: Fair	49%	45%	58%
Mountain Ave: Poor	42%	47%	30%

Q8e. Cont'd… Selection and quality of eating places	All Responses (758)	Non-Shoppers (486)	Shoppers (164)
Route 22: Good	29%	26%	36%
Route 22: Fair	50%	50%	49%
Route 22: Poor	22%	24%	15%

Q8f. Convenient parking	All Responses (754)	Non-Shoppers (483)	Shoppers (165)
Downtown Morris Ave: Good	11%	10%	12%
Downtown Morris Ave: Fair	50%	48%	55%
Downtown Morris Ave: Poor	39%	42%	33%
Morris Ave near Short Hills: Good	21%	18%	27%
Morris Ave near Short Hills: Fair	55%	56%	54%
Morris Ave near Short Hills: Poor	23%	25%	19%
Mountain Ave: Good	23%	21%	29%
Mountain Ave: Fair	58%	60%	52%
Mountain Ave: Poor	19%	20%	19%
Route 22: Good	53%	51%	63%
Route 22: Fair	39%	41%	31%
Route 22: Poor	7%	8%	6%

Q8g. Smoothness of traffic flow	All Responses (754)	Non-Shoppers (483)	Shoppers (165)
Downtown Morris Ave: Good	14%	13%	14%
Downtown Morris Ave: Fair	50%	50%	50%
Downtown Morris Ave: Poor	36%	37%	36%
Morris Ave near Short Hills: Good	18%	17%	22%
Morris Ave near Short Hills: Fair	53%	53%	51%
Morris Ave near Short Hills: Poor	29%	30%	27%
Mountain Ave: Good	35%	33%	42%
Mountain Ave: Fair	56%	57%	52%
Mountain Ave: Poor	9%	10%	6%
Route 22: Good	24%	22%	27%
Route 22: Fair	52%	51%	53%
Route 22: Poor	24%	26%	19%

Q8h. Pedestrian safety / crosswalks	All Responses (750)	Non-Shoppers (481)	Shoppers (169)
Downtown Morris Ave: Good	24%	23%	23%
Downtown Morris Ave: Fair	42%	40%	46%
Downtown Morris Ave: Poor	34%	36%	31%

Q8h. Cont'd… Pedestrian safety / crosswalks	All Responses (750)	Non-Shoppers (481)	Shoppers (169)
Morris Ave near Short Hills: Good	17%	16%	17%
Morris Ave near Short Hills: Fair	43%	41%	43%
Morris Ave near Short Hills: Poor	41%	43%	40%
Mountain Ave: Good	34%	31%	41%
Mountain Ave: Fair	49%	50%	44%
Mountain Ave: Poor	18%	19%	16%
Route 22: Good	7%	6%	7%
Route 22: Fair	21%	19%	18%
Route 22: Poor	72%	75%	75%

Q8i. Cleanliness of streets / sidewalks / parking areas	All Responses (757)	Non-Shoppers (486)	Shoppers (168)
Downtown Morris Ave: Good	17%	15%	20%
Downtown Morris Ave: Fair	42%	42%	42%
Downtown Morris Ave: Poor	41%	43%	38%
Morris Ave near Short Hills: Good	26%	25%	31%
Morris Ave near Short Hills: Fair	54%	55%	51%
Morris Ave near Short Hills: Poor	20%	20%	18%
Mountain Ave: Good	34%	33%	39%
Mountain Ave: Fair	52%	53%	47%
Mountain Ave: Poor	15%	14%	14%
Route 22: Good	16%	15%	19%
Route 22: Fair	50%	52%	43%
Route 22: Poor	34%	33%	38%

Q9. Favorite place to dine or shop in the area	All Responses (635)	Non-Shoppers (421)	Shoppers (143)
Westfield, NJ	21%	22%	18%
Millburn, NJ	9%	10%	7%
Sofia's, Springfield	7%	6%	9%
Summit, NJ	6%	6%	4%
McLynn's, Springfield	3%	4%	3%
Short Hills Mall, Millburn	3%	4%	1%
Route 22, Springfield	2%	3%	1%
Outback Steakhouse	2%	2%	1%
Panera Bread	2%	2%	1%
Cioffi's Deli, Springfield	1%	2%	1%
Union Plaza Diner, Union	1%	1%	1%
Olive Garden	1%	1%	2%

Q9. Cont'd… Favorite place to dine or shop in the area	All Responses (635)	Non-Shoppers (421)	Shoppers (143)
Bagels Supreme, Springfield	1%	1%	0%
Barnes & Noble	1%	1%	3%
Hunan Spring, Springfield	1%	1%	1%
Picante, Taste of Mexico, Springfield	1%	1%	1%
Bed Bath & Beyond	1%	1%	1%
Dunkin Donuts	1%	0%	1%
Hinari Sushi, Springfield	1%	1%	1%
Mosaico Restaurant, Mountainside	1%	0%	3%
West 22 Diner, Springfield	1%	1%	1%
Wine Library, Springfield	1%	1%	1%
Basilica, Millburn	1%	1%	1%

Q10. Monthly visits and avg. expenditures	All Responses (683)	Non-Shoppers (493)	Shoppers (170)
Dining visits: Springfield	2.90	2.49	4.01
Avg. spent per visit	$37.78	$37.54	$38.03
Dining visits: elsewhere	5.80	5.73	6.19
Avg. spent per visit	$65.75	$65.23	$64.90
Shopping visits: Springfield	2.14	0.60	6.60
Avg. spent per visit	$30.51	$17.73	$61.92
Shopping visits: elsewhere	7.86	7.05	10.17
Avg. spent per visit	$105.32	$113.20	$85.60
Don't dine in Springfield	19%	22%	16%
Don't shop in Springfield	44%	100%	0%

Q11a. About how often do you use the Jitney transportation service in Springfield?	All Responses (595)	Non-Shoppers (402)	Shoppers (139)
Daily	2%	2%	1%
A few times per week	0%	0%	0%
Several times per month	0%	0%	1%
Once a month or less	97%	97%	99%

Q11b. About how often do you use NJ Transit buses to access shopping and/or dining in Springfield?	All Responses (597)	Non-Shoppers (406)	Shoppers (138)
Daily	1%	1%	0%
A few times per week	0%	0%	0%
Several times per month	2%	2%	0%
Once a month or less	97%	96%	1%

Q12. Do you support measures to calm vehicular traffic along downtown Morris Avenue, and make the area more walkable and pedestrian friendly?	All Responses (730)	Non-Shoppers (481)	Shoppers (169)
Yes	85%	86%	87%
No	15%	14%	13%

Q13. Would shop Springfield more often if it offered more… *(% "Yes")*	All Responses (738)	Non-Shoppers (486)	Shoppers (169)
a. Casual, full-service (table service) restaurants	81%	82%	82%
b. Fine (upscale) dining	57%	60%	54%
c. Outdoor dining / sidewalk cafes	77%	80%	76%
d. Delicatessens, sandwich shops	74%	73%	76%
e. Coffee shops / cafes	75%	77%	74%
f. Ethnic / specialty food stores	46%	47%	45%
g. Health clubs / fitness center	20%	20%	16%
h. Party supplies	22%	23%	20%
I. ATMs (cash machines)	28%	28%	26%
j. Dentists, dental services	13%	13%	13%
k. Family / general practive doctors	16%	17%	13%
l. Optical goods / eye care	21%	21%	17%

Q14. Primary reasons for visiting downtown Morris Ave shopping district.	All Responses (795)	Non-Shoppers (496)	Shoppers (216)
a. Visit stores / shops	15%	13%	19%
b. Go to eating and/or drinking places	33%	34%	32%
c. Personal business or medical appointment	6%	4%	7%
d. Meet friends / socialize	11%	10%	12%
e. I live there	8%	8%	9%
f. I work there	4%	4%	5%
g. I don't go there at all	20%	24%	12%
h. Other	4%	4%	4%

Q14. Primary reasons for visiting Morris Ave near Short Hills.	All Responses (699)	Non-Shoppers (438)	Shoppers (192)
a. Visit stores / shops	36%	34%	38%
b. Go to eating and/or drinking places	19%	18%	21%
c. Personal business or medical appointment	11%	10%	11%
d. Meet friends / socialize	7%	7%	7%
e. I live there	8%	8%	7%
f. I work there	2%	3%	2%
g. I don't go there at all	15%	18%	13%
h. Other	2%	3%	2%

Q14. Primary reasons for visiting Mountain Ave shopping district.	All Responses (908)	Non-Shoppers (568)	Shoppers (248)
a. Visit stores / shops	20%	18%	27%
b. Go to eating and/or drinking places	31%	31%	30%
c. Personal business or medical appointment	11%	11%	10%
d. Meet friends / socialize	11%	10%	11%
e. I live there	13%	13%	13%
f. I work there	4%	4%	3%
g. I don't go there at all	8%	11%	4%
h. Other	3%	3%	2%

Q14. Primary reasons for visiting the Route 22 shopping district.	All Responses (1025)	Non-Shoppers (671)	Shoppers (258)
a. Visit stores / shops	44%	44%	44%
b. Go to eating and/or drinking places	31%	31%	28%
c. Personal business or medical appointment	5%	5%	5%
d. Meet friends / socialize	12%	12%	14%
e. I live there	3%	3%	3%
f. I work there	2%	1%	2%
g. I don't go there at all	4%	4%	3%
h. Other	1%	1%	0%

Q15. Main reasons for NOT visiting downtown Morris Ave more often	All Responses (2,141)	Non-Shoppers (1,471)	Shoppers (483)
a. Too few stores	24%	24%	24%
b. Too few eating places	17%	17%	16%
c. Traffic congestion	12%	11%	12%
d. Selection / quality of stores / merchandise	24%	24%	25%
e. Store hours are uncertain or inconvenient	8%	8%	8%
f. Parking	13%	13%	12%
g. Other	3%	3%	2%

Q15. Main reasons for NOT visiting Morris Ave near Short Hills more often	All Responses (1,093)	Non-Shoppers (779)	Shoppers (211)
a. Too few stores	23%	22%	23%
b. Too few eating places	23%	23%	25%
c. Traffic congestion	15%	13%	18%
d. Selection / quality of stores / merchandise	22%	23%	18%
e. Store hours are uncertain or inconvenient	6%	6%	5%
f. Parking	9%	8%	9%
g. Other	3%	3%	2%

Q15. Main reasons for NOT visiting Mountain Ave more often	All Responses (1,032)	Non-Shoppers (758)	Shoppers (200)
a. Too few stores	28%	28%	31%
b. Too few eating places	22%	22%	24%
c. Traffic congestion	5%	5%	4%
d. Selection / quality of stores / merchandise	26%	26%	28%
e. Store hours are uncertain or inconvenient	7%	8%	6%
f. Parking	8%	8%	7%
g. Other	3%	3%	1%

Q15. Main reasons for NOT visiting Route 22 more often	All Responses (529)	Non-Shoppers (378)	Shoppers (109)
a. Too few stores	9%	10%	5%
b. Too few eating places	10%	10%	10%
c. Traffic congestion	47%	44%	59%
d. Selection / quality of stores / merchandise	20%	22%	14%
e. Store hours are uncertain or inconvenient	4%	5%	4%
f. Parking	5%	5%	6%
g. Other	5%	5%	4%

Q16. Hard to find goods / services *(unprompted)*	All Responses (376)	Non-Shoppers (248)	Shoppers (98)
Dining (NES)	19%	18%	20%
Dining, upscale	2%	3%	2%
Dining, outdoor	2%	2%	3%
Deli, sandwich shop	3%	3%	3%
Tavern / Pubs	1%	2%	1%
Stores, clothing	15%	16%	13%
Stores (NES)	10%	9%	9%
Stores, cards & gifts	3%	4%	2%
Stores, Shoes	2%	2%	3%
Stores, department	1%	1%	2%
Grocery stores / supermarkets	11%	12%	8%
Bakery	9%	6%	15%
Coffee shop /café	6%	8%	2%
Entertainment	2%	2%	2%
All others	13%	13%	13%

Q17. Events attended	All Responses (598)	Non-Shoppers (390)	Shoppers (138)
Farmers' Market	64%	64%	67%
Fouth of July events	58%	56%	67%
Fall for Springfield festival & car show	44%	43%	46%
Memorial Day Parade	34%	33%	43%
Summer Concert	31%	30%	37%

Q18. Sense of security *(% "Very SECURE")*	All Responses (718)	Non-Shoppers (475)	Shoppers (164)
In home neighborhood	63%	62%	65%
When visiting Mountain Ave for shopping/dining	60%	57%	64%
When visiting Route 22 for shopping/dining	16%	14%	16%
When visiting downtown Morris Ave for shopping/dining	35%	34%	32%
When visiting Morris Ave near Short Hills for shop/dine	50%	49%	50%
When attending community events in Springfield	70%	67%	74%
Waiting at bus stops in Springfield	30%	28%	35%

Q18. Sense of security *(% "Very INSECURE")*	All Responses (718)	Non-Shoppers (475)	Shoppers (164)
In home neighborhood	1%	0%	1%
When visiting Mountain Ave for shopping/dining	1%	1%	0%
When visiting Route 22 for shopping/dining	6%	7%	5%
When visiting downtown Morris Ave for shopping/dining	4%	4%	2%
When visiting Morris Ave near Short Hills for shop/dine	1%	1%	0%
When attending community events in Springfield	0%	0%	0%
Waiting at bus stops in Springfield	7%	8%	5%

Q19. Most useful shopping/dining resources	All Responses (706)	Non-Shoppers (471)	Shoppers (165)
Recommendations by family / friends	86%	87%	84%
Company or store websites	40%	40%	42%
Newspapers	38%	36%	48%
Direct mail materials	32%	32%	35%
Social media (Facebook, Twitter, etc.)	26%	27%	24%
Email and/or text alerts	22%	23%	21%
Television	19%	18%	21%
Smartphone apps	13%	14%	12%
Radio	10%	10%	11%

Q20. Value sources for learning about new places to shop, dine, or sales, promotions, activities & events.	All Responses (601)	Non-Shoppers (292)	Shoppers (95)
Google: Very valuable	57%	60%	57%
Google: Somewhat valuable	26%	27%	25%
Google: Not valuable	16%	13%	18%
Facebook: Very valuable	26%	26%	25%
Facebook: Somewhat valuable	32%	32%	32%
Facebook: Not valuable	42%	42%	43%
Twitter: Very valuable	6%	6%	6%
Twitter: Somewhat valuable	13%	15%	11%
Twitter: Not valuable	81%	80%	83%
Yelp: Very valuable	18%	18%	19%
Yelp: Somewhat valuable	19%	19%	19%
Yelp: Not valuable	63%	63%	62%
Groupon: Very valuable	23%	24%	25%
Groupon: Somewhat valuable	31%	32%	28%
Groupon: Not valuable	46%	44%	47%
Urban Spoon app: Very valuable	8%	8%	7%
Urban Spoon app: Somewhat valuable	17%	18%	15%
Urban Spoon app: Not valuable	76%	74%	78%
Craigslist: Very valuable	3%	0%	4%
Craigslist: Somewhat valuable	12%	12%	11%
Craigslist: Not valuable	85%	62%	84%
Springfield Patch: Very valuable	31%	28%	36%
Springfield Patch: Somewhat valuable	43%	44%	45%
Springfield Patch: Not valuable	25%	28%	19%
Springfield Patriot: Very valuable	24%	22%	29%
Springfield Patriot: Somewhat valuable	43%	43%	44%
Springfield Patriot: Not valuable	32%	35%	26%
Other: Very valuable	52%	55%	50%
Other: Somewhat valuable	14%	9%	23%
Other: Not valuable	34%	36%	27%

Q21. Gender	All Responses (645)	Non-Shoppers (420)	Shoppers (154)
Female	66%	65%	67%
Male	34%	35%	33%

Q22. Residents in household	All Responses (733)	Non-Shoppers (477)	Shoppers (166)
Adults (18+)	2.20	2.20	2.17
Children (under 18)	1.36	1.35	1.38

Q23. Age of respondent	All Responses (730)	Non-Shoppers (477)	Shoppers (167)
Under 18	1%	0%	1%
18 to 24	2%	1%	1%
25 to 34	15%	16%	10%
35 to 44	27%	30%	23%
45 to 54	24%	21%	34%
55 to 64	20%	20%	18%
65 or older	12%	10%	14%

Q24. Household income	All Responses (628)	Non-Shoppers (419)	Shoppers (142)
Less than $25,000 per year	3%	1%	4%
$25,000 to $34,999 per year	1%	1%	1%
$35,000 to $49,999 per year	4%	3%	4%
$50,000 to $74,999 per year	11%	10%	8%
$75,000 to $99,999 per year	12%	11%	16%
$100,000 to $149,999 per year	33%	34%	33%
$150,000 to $249,999 per year	21%	25%	18%
$250,000 or more per year	9%	9%	8%

Appendix B

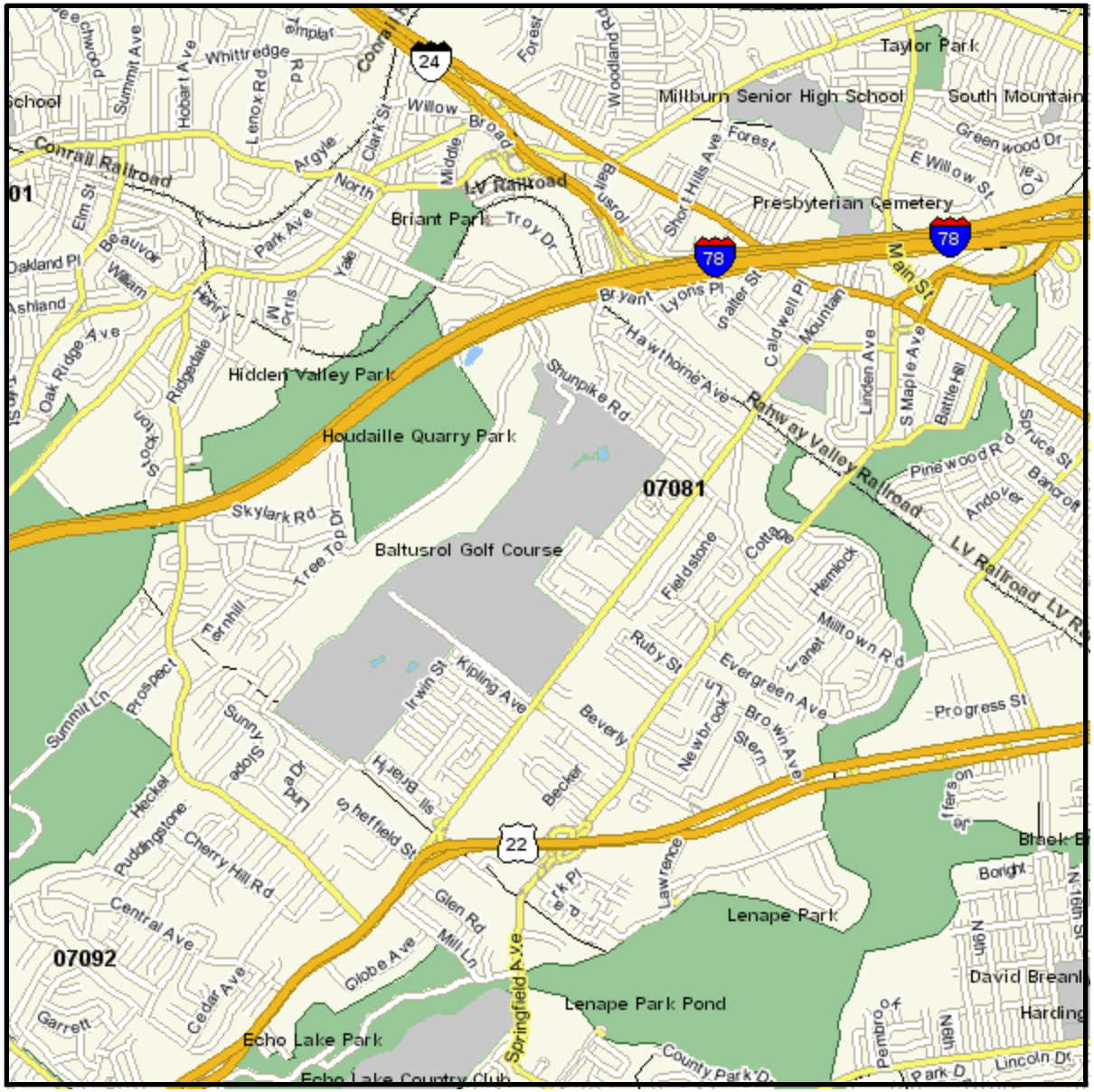
Study Area Maps

Springfield

3-, 5-, 10-mile Radius

Area Map

Springfield Township



Place
See Appendix for Geographies

- Interstate Highways
- US Highways
- State Highways
- Major Highways
- Major Roads
- Roads
- Railroads
- Landmarks
- Parks
- Hydrography
- Airports
- Zip Code

0 miles 0.35 0.71

N W E S

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Area Map

Springfield Township

Appendix: Area Listing

Area Name:

Type: List - Place

Geography Code	Geography Name	Geography Code	Geography Name
3470050	Springfield CDP		

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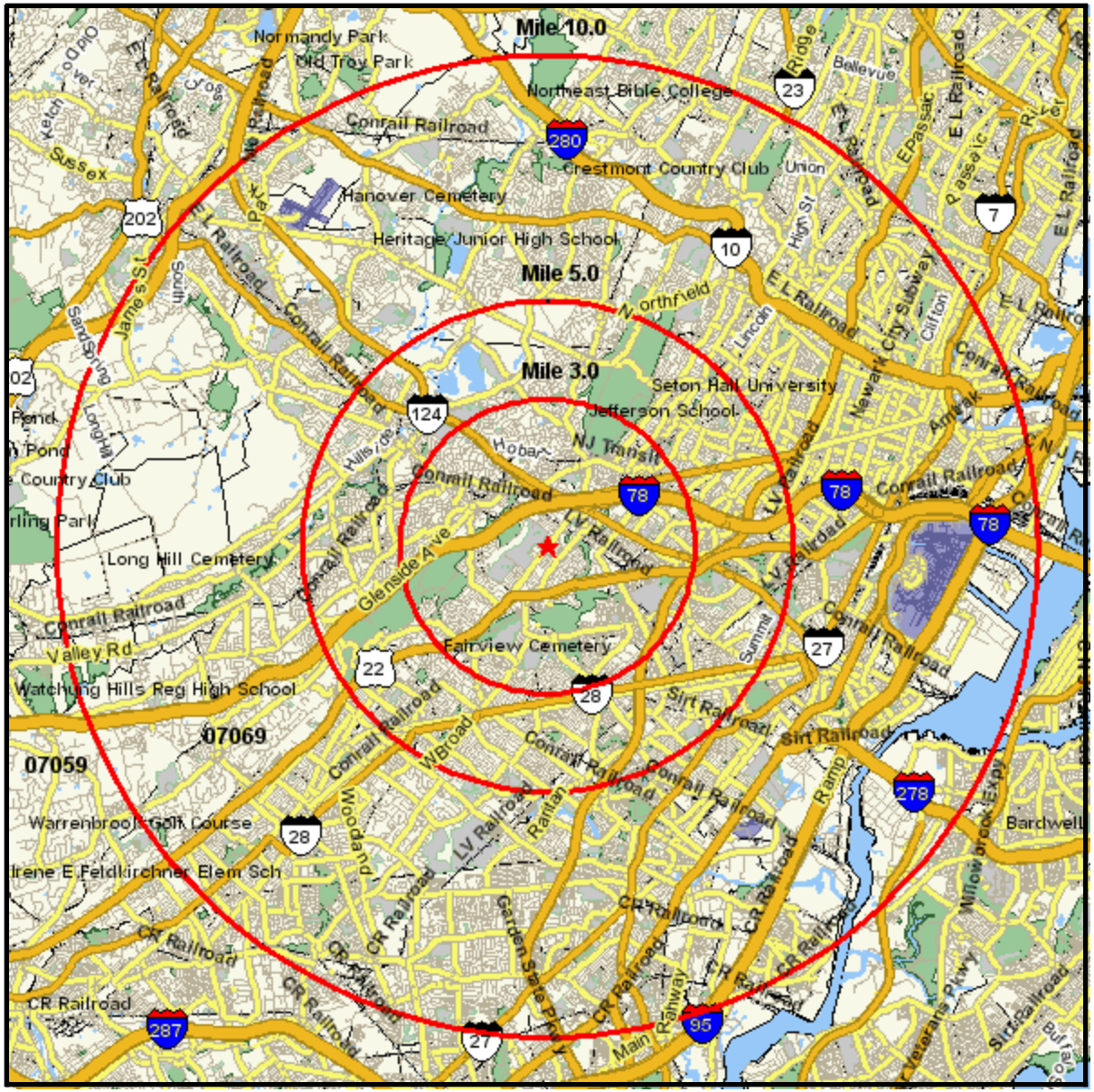
Area Map

Sprngfld 3,5,10-miles



MOUNTAIN AVE AT RICHLAND DR
SPRINGFIELD,NJ 07081
Coord: 40.699260, -74.322781
Radius - See Appendix for Details

- Point
- Interstate Highways
- US Highways
- State Highways
- Major Highways
- Major Roads
- Roads
- Railroads
- Landmarks
- Parks
- Hydrography
- Airports
- Zip Code

0 miles 2.21 4.42

N W E S

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Area Map

Sprngfld 3,5,10-miles

Appendix: Area Listing

Area Name:

Type: Radius 1

Radius Definition:

MOUNTAIN AVE AT RICHLAND DR	Center Point:	40.699260		-74.322781
SPRINGFIELD, NJ 07081	Circle/Band:	0.00	-	3.00

Area Name:

Type: Radius 2

Radius Definition:

MOUNTAIN AVE AT RICHLAND DR	Center Point:	40.699260		-74.322781
SPRINGFIELD, NJ 07081	Circle/Band:	0.00	-	5.00

Area Name:

Type: Radius 3

Radius Definition:

MOUNTAIN AVE AT RICHLAND DR	Center Point:	40.699260		-74.322781
SPRINGFIELD, NJ 07081	Circle/Band:	0.00	-	10.00

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Appendix C

Syndicated Data: Demographics

Springfield

3-, 5-, 10-mile Radius

Pop-Facts: Demographic Snapshot 2011 Report

Springfield Township

Place, (see appendix for geographies), aggregate

Description	Total *Place*	*%*
Population		
2016 Projection	15,763	
2011 Estimate	15,430	
2000 Census	14,429	
1990 Census	13,420	
Growth 2011-2016	2.16%	
Growth 2000-2011	6.94%	
Growth 1990-2000	7.52%	
2011 Est. Pop by Single Race Class	15,430	
White Alone	13,305	86.23
Black or African American Alone	613	3.97
Amer. Indian and Alaska Native Alone	6	0.04
Asian Alone	1,056	6.84
Native Hawaiian and Other Pac. Isl. Alone	0	0.00
Some Other Race Alone	238	1.54
Two or More Races	212	1.37
2011 Est. Pop Hisp or Latino by Origin	15,430	
Not Hispanic or Latino	14,328	92.86
Hispanic or Latino:	1,102	7.14
Mexican	71	6.44
Puerto Rican	126	11.43
Cuban	58	5.26
All Other Hispanic or Latino	847	76.86
2011 Est. Hisp or Latino by Single Race Class	1,102	
White Alone	846	76.77
Black or African American Alone	2	0.18
American Indian and Alaska Native Alone	2	0.18
Asian Alone	2	0.18
Native Hawaiian and Other Pacific Islander Alone	0	0.00
Some Other Race Alone	216	19.60
Two or More Races	34	3.09

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Pop-Facts: Demographic Snapshot 2011 Report

Springfield Township

Place, (see appendix for geographies), aggregate

Description	Total *Place*	%
2011 Est. Pop. Asian Alone Race by Cat	1,056	
Chinese, except Taiwanese	349	33.05
Filipino	215	20.36
Japanese	30	2.84
Asian Indian	325	30.78
Korean	70	6.63
Vietnamese	32	3.03
Cambodian	0	0.00
Hmong	0	0.00
Laotian	0	0.00
Thai	2	0.19
All Other Asian Races Including 2+ Category	33	3.12
2011 Est. Population by Ancestry	15,430	
Pop, Arab	24	0.16
Pop, Czech	13	0.08
Pop, Danish	5	0.03
Pop, Dutch	69	0.45
Pop, English	255	1.65
Pop, French (except Basque)	65	0.42
Pop, French Canadian	48	0.31
Pop, German	888	5.76
Pop, Greek	300	1.94
Pop, Hungarian	102	0.66
Pop, Irish	951	6.16
Pop, Italian	2,892	18.74
Pop, Lithuanian	20	0.13
Pop, United States or American	896	5.81
Pop, Norwegian	24	0.16
Pop, Polish	781	5.06
Pop, Portuguese	202	1.31
Pop, Russian	1,133	7.34
Pop, Scottish	72	0.47
Pop, Scotch-Irish	45	0.29
Pop, Slovak	81	0.52
Pop, Subsaharan African	143	0.93
Pop, Swedish	15	0.10
Pop, Swiss	9	0.06
Pop, Ukrainian	262	1.70
Pop, Welsh	14	0.09
Pop, West Indian (exc Hisp groups)	201	1.30
Pop, Other ancestries	5,172	33.52

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Pop-Facts: Demographic Snapshot 2011 Report

Springfield Township

Place, (see appendix for geographies), aggregate

Description	Total *Place*	*%*
2011 Est. Population by Ancestry		
Pop, Ancestry Unclassified	748	4.85
2011 Est. Pop Age 5+ by Language Spoken At Home	14,495	
Speak Only English at Home	10,621	73.27
Speak Asian/Pac. Isl. Lang. at Home	499	3.44
Speak IndoEuropean Language at Home	2,192	15.12
Speak Spanish at Home	793	5.47
Speak Other Language at Home	390	2.69
2011 Est. Population by Sex	15,430	
Male	7,434	48.18
Female	7,996	51.82
2011 Est. Population by Age	15,430	
Age 0 - 4	935	6.06
Age 5 - 9	975	6.32
Age 10 - 14	973	6.31
Age 15 - 17	574	3.72
Age 18 - 20	414	2.68
Age 21 - 24	624	4.04
Age 25 - 34	1,370	8.88
Age 35 - 44	2,102	13.62
Age 45 - 54	2,490	16.14
Age 55 - 64	2,088	13.53
Age 65 - 74	1,385	8.98
Age 75 - 84	1,043	6.76
Age 85 and over	457	2.96
Age 16 and over	12,358	80.09
Age 18 and over	11,973	77.60
Age 21 and over	11,559	74.91
Age 65 and over	2,885	18.70
2011 Est. Median Age	43.80	
2011 Est. Average Age	42.10	

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Pop-Facts: Demographic Snapshot 2011 Report

Springfield Township

Place, (see appendix for geographies), aggregate

Description	Total *Place*	*%*
2011 Est. Male Population by Age	7,434	
Age 0 - 4	480	6.46
Age 5 - 9	500	6.73
Age 10 - 14	502	6.75
Age 15 - 17	292	3.93
Age 18 - 20	231	3.11
Age 21 - 24	291	3.91
Age 25 - 34	686	9.23
Age 35 - 44	1,062	14.29
Age 45 - 54	1,246	16.76
Age 55 - 64	969	13.03
Age 65 - 74	579	7.79
Age 75 - 84	439	5.91
Age 85 and over	157	2.11
2011 Est. Median Age, Male	41.92	
2011 Est. Average Age, Male	40.30	
2011 Est. Female Population by Age	7,996	
Age 0 - 4	455	5.69
Age 5 - 9	475	5.94
Age 10 - 14	471	5.89
Age 15 - 17	282	3.53
Age 18 - 20	183	2.29
Age 21 - 24	333	4.16
Age 25 - 34	684	8.55
Age 35 - 44	1,040	13.01
Age 45 - 54	1,244	15.56
Age 55 - 64	1,119	13.99
Age 65 - 74	806	10.08
Age 75 - 84	604	7.55
Age 85 and over	300	3.75
2011 Est. Median Age, Female	45.61	
2011 Est. Average Age, Female	43.70	

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Pop-Facts: Demographic Snapshot 2011 Report

Springfield Township

Place, (see appendix for geographies), aggregate

Description	Total *Place*	%
2011 Est. Pop Age 15+ by Marital Status	12,547	
Total, Never Married	3,239	25.81
Males, Never Married	1,819	14.50
Females, Never Married	1,420	11.32
Married, Spouse present	7,163	57.09
Married, Spouse absent	241	1.92
Widowed	1,021	8.14
Males Widowed	195	1.55
Females Widowed	826	6.58
Divorced	883	7.04
Males Divorced	255	2.03
Females Divorced	628	5.01
2011 Est. Pop. Age 25+ by Edu. Attainment	10,935	
Less than 9th grade	318	2.91
Some High School, no diploma	330	3.02
High School Graduate (or GED)	2,622	23.98
Some College, no degree	1,458	13.33
Associate Degree	609	5.57
Bachelor's Degree	3,593	32.86
Master's Degree	1,356	12.40
Professional School Degree	430	3.93
Doctorate Degree	219	2.00
2011 Est Pop Age 25+ by Edu. Attain, Hisp. or Lat	684	
Less than 9th grade	36	5.26
Some High School, no diploma	69	10.09
High School Graduate (or GED)	321	46.93
Some College, no degree	105	15.35
Associate Degree	36	5.26
Bachelor's Degree	61	8.92
Graduate or Professional Degree	56	8.19

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Pop-Facts: Demographic Snapshot 2011 Report

Springfield Township

Place, (see appendix for geographies), aggregate

Description	Total *Place*	%
Households		
2016 Projection	6,281	
2011 Estimate	6,201	
2000 Census	6,001	
1990 Census	5,781	
Growth 2011-2016	1.29%	
Growth 2000-2011	3.33%	
Growth 1990-2000	3.81%	
2011 Est. Households by Household Type	6,201	
Family Households	4,162	67.12
Nonfamily Households	2,039	32.88
2011 Est. Group Quarters Population	12	
2011 HHs by Ethnicity, Hispanic/Latino	329	5.31
2011 Est. HHs by HH Income	6,201	
Income Less than $15,000	395	6.37
Income $15,000 - $24,999	336	5.42
Income $25,000 - $34,999	309	4.98
Income $35,000 - $49,999	574	9.26
Income $50,000 - $74,999	921	14.85
Income $75,000 - $99,999	1,002	16.16
Income $100,000 - $124,999	876	14.13
Income $125,000 - $149,999	618	9.97
Income $150,000 - $199,999	494	7.97
Income $200,000 - $499,999	570	9.19
Income $500,000 and more	106	1.71
2011 Est. Average Household Income	$110,596	
2011 Est. Median Household Income	$89,109	
2011 Est. Per Capita Income	$44,478	

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Pop-Facts: Demographic Snapshot 2011 Report

Springfield Township

Place, (see appendix for geographies), aggregate

Description	Total *Place*	%
2011 Median HH Inc by Single Race Class. or Ethn		
White Alone	86,634	
Black or African American Alone	89,583	
American Indian and Alaska Native Alone	75,000	
Asian Alone	117,287	
Native Hawaiian and Other Pacific Islander Alone	0	
Some Other Race Alone	114,474	
Two or More Races	86,111	
Hispanic or Latino	97,645	
Not Hispanic or Latino	88,478	
2011 Est. Family HH Type, Presence Own Children	4,162	
Married-Couple Family, own children	1,437	34.53
Married-Couple Family, no own children	1,997	47.98
Male Householder, own children	53	1.27
Male Householder, no own children	158	3.80
Female Householder, own children	195	4.69
Female Householder, no own children	322	7.74
2011 Est. Households by Household Size	6,201	
1-person household	1,709	27.56
2-person household	2,020	32.58
3-person household	1,064	17.16
4-person household	860	13.87
5-person household	388	6.26
6-person household	108	1.74
7 or more person household	52	0.84
2011 Est. Average Household Size	2.49	

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Pop-Facts: Demographic Snapshot 2011 Report

Springfield Township

Place, (see appendix for geographies), aggregate

Description	Total *Place*	%
2011 Est. Households by Presence of People	6,201	
Households with 1 or more People under Age 18:	1,696	27.35
Married-Couple Family	1,416	83.49
Other Family, Male Householder	57	3.36
Other Family, Female Householder	216	12.74
Nonfamily, Male Householder	7	0.41
Nonfamily, Female Householder	0	0.00
Households no People under Age 18:	4,505	72.65
Married-Couple Family	1,897	42.11
Other Family, Male Householder	145	3.22
Other Family, Female Householder	279	6.19
Nonfamily, Male Householder	796	17.67
Nonfamily, Female Householder	1,388	30.81
2011 Est. Households by Number of Vehicles	6,201	
No Vehicles	401	6.47
1 Vehicle	2,182	35.19
2 Vehicles	2,708	43.67
3 Vehicles	621	10.01
4 Vehicles	246	3.97
5 or more Vehicles	43	0.69
2011 Est. Average Number of Vehicles	1.73	
Family Households		
2016 Projection	4,216	
2011 Estimate	4,162	
2000 Census	4,015	
1990 Census	3,935	
Growth 2011-2016	1.30%	
Growth 2000-2011	3.66%	
Growth 1990-2000	2.03%	
2011 Est. Families by Poverty Status	4,162	
2011 Families at or Above Poverty	4,095	98.39
2011 Families at or Above Poverty with Children	1,698	40.80
2011 Families Below Poverty	67	1.61
2011 Families Below Poverty with Children	33	0.79

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Pop-Facts: Demographic Snapshot 2011 Report

Springfield Township

Place, (see appendix for geographies), aggregate

Description	Total *Place*	*%*
2011 Est. Pop Age 16+ by Employment Status	12,358	
In Armed Forces	12	0.10
Civilian - Employed	8,333	67.43
Civilian - Unemployed	195	1.58
Not in Labor Force	3,818	30.89
2011 Est. Civ Employed Pop 16+ Class of Worker	7,923	
For-Profit Private Workers	5,651	71.32
Non-Profit Private Workers	645	8.14
Local Government Workers	562	7.09
State Government Workers	229	2.89
Federal Government Workers	59	0.74
Self-Emp Workers	1,199	15.13
Unpaid Family Workers	20	0.25
2011 Est. Civ Employed Pop 16+ by Occupation	7,923	
Architect/Engineer	122	1.54
Arts/Entertain/Sports	315	3.98
Building Grounds Maint	232	2.93
Business/Financial Ops	737	9.30
Community/Soc Svcs	152	1.92
Computer/Mathematical	362	4.57
Construction/Extraction	332	4.19
Edu/Training/Library	429	5.41
Farm/Fish/Forestry	7	0.09
Food Prep/Serving	133	1.68
Health Practitioner/Tec	300	3.79
Healthcare Support	203	2.56
Maintenance Repair	153	1.93
Legal	273	3.45
Life/Phys/Soc Science	146	1.84
Management	950	11.99
Office/Admin Support	958	12.09
Production	293	3.70
Protective Svcs	169	2.13
Sales/Related	1,232	15.55
Personal Care/Svc	240	3.03
Transportation/Moving	185	2.33

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Pop-Facts: Demographic Snapshot 2011 Report

Springfield Township

Place, (see appendix for geographies), aggregate

Description	Total *Place*	*%*
2011 Est. Pop 16+ by Occupation Classification	7,923	
Blue Collar	963	12.15
White Collar	5,976	75.43
Service and Farm	984	12.42
2011 Est. Workers Age 16+, Transp. To Work	7,792	
Drove Alone	6,210	79.70
Car Pooled	374	4.80
Public Transportation	676	8.68
Walked	146	1.87
Bicycle	15	0.19
Other Means	11	0.14
Worked at Home	360	4.62
2011 Est. Workers Age 16+ by Travel Time to Work *		
Less than 15 Minutes	1,818	
15 - 29 Minutes	2,755	
30 - 44 Minutes	1,717	
45 - 59 Minutes	480	
60 or more Minutes	738	
2011 Est. Avg Travel Time to Work in Minutes	29.56	
2011 Est. Tenure of Occupied Housing Units	6,201	
Owner Occupied	4,617	74.46
Renter Occupied	1,584	25.54
2011 Owner Occ. HUs: Avg. Length of Residence	19	
2011 Renter Occ. HUs: Avg. Length of Residence	9	

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Pop-Facts: Demographic Snapshot 2011 Report

Springfield Township

Place, (see appendix for geographies), aggregate

Description	Total *Place*	%
2011 Est. All Owner-Occupied Housing Values	4,617	
Value Less than $20,000	3	0.06
Value $20,000 - $39,999	6	0.13
Value $40,000 - $59,999	19	0.41
Value $60,000 - $79,999	0	0.00
Value $80,000 - $99,999	16	0.35
Value $100,000 - $149,999	44	0.95
Value $150,000 - $199,999	177	3.83
Value $200,000 - $299,999	504	10.92
Value $300,000 - $399,999	1,065	23.07
Value $400,000 - $499,999	1,132	24.52
Value $500,000 - $749,999	1,340	29.02
Value $750,000 - $999,999	248	5.37
Value $1,000,000 or more	63	1.36
2011 Est. Median All Owner-Occupied Housing Value	$441,917	
2011 Est. Housing Units by Units in Structure	6,522	
1 Unit Attached	516	7.91
1 Unit Detached	3,922	60.13
2 Units	299	4.58
3 or 4 Units	549	8.42
5 to 19 Units	446	6.84
20 to 49 Units	160	2.45
50 or More Units	627	9.61
Mobile Home or Trailer	1	0.02
Boat, RV, Van, etc.	2	0.03
2011 Est. Housing Units by Year Structure Built	6,522	
Housing Unit Built 2000 or later	477	7.31
Housing Unit Built 1990 to 1999	314	4.81
Housing Unit Built 1980 to 1989	353	5.41
Housing Unit Built 1970 to 1979	618	9.48
Housing Unit Built 1960 to 1969	948	14.54
Housing Unit Built 1950 to 1959	2,283	35.00
Housing Unit Built 1940 to 1949	939	14.40
Housing Unit Built 1939 or Earlier	590	9.05
2011 Est. Median Year Structure Built **	1958	

**1939 will appear when at least half of the Housing Units in this reports area were built in 1939 or earlier.

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Appendix: Area Listing

Area Name:

Type: List - Place Reporting Detail: Aggregate Reporting Level: Place

Geography Code	Geography Name	Geography Code	Geography Name
3470050	Springfield CDP		

Project Information:

Site: 3

Order Number: 970855353

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Pop-Facts: Demographic Snapshot 2011 Report

Sprngfld 3,5,10-miles

Radius 1: MOUNTAIN AVE AT RICHLAND DR, SPRINGFIELD, NJ 07081, aggregate
Radius 2: MOUNTAIN AVE AT RICHLAND DR, SPRINGFIELD, NJ 07081, aggregate
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Description	0.00 - 3.00 miles *Radius 1*	%	0.00 - 5.00 miles *Radius 2*	%	0.00 - 10.00 miles *Radius 3*	%
Population						
2016 Projection	102,650		340,023		1,460,385	
2011 Estimate	103,294		343,929		1,464,143	
2000 Census	103,291		348,098		1,453,645	
1990 Census	97,663		328,969		1,391,034	
Growth 2011-2016	-0.62%		-1.14%		-0.26%	
Growth 2000-2011	0.00%		-1.20%		0.72%	
Growth 1990-2000	5.76%		5.81%		4.50%	
2011 Est. Pop by Single Race Class	103,294		343,929		1,464,143	
White Alone	82,051	79.43	231,074	67.19	735,368	50.23
Black or African American Alone	9,305	9.01	69,588	20.23	439,814	30.04
Amer. Indian and Alaska Native Alone	129	0.12	599	0.17	4,561	0.31
Asian Alone	7,263	7.03	20,823	6.05	95,496	6.52
Native Hawaiian and Other Pac. Isl. Alone	35	0.03	181	0.05	1,067	0.07
Some Other Race Alone	2,363	2.29	10,798	3.14	124,661	8.51
Two or More Races	2,150	2.08	10,867	3.16	63,176	4.31
2011 Est. Pop Hisp or Latino by Origin	103,294		343,929		1,464,143	
Not Hispanic or Latino	92,381	89.44	304,126	88.43	1,141,164	77.94
Hispanic or Latino:	10,914	10.57	39,803	11.57	322,979	22.06
Mexican	1,040	9.53	4,857	12.20	23,799	7.37
Puerto Rican	1,943	17.80	8,246	20.72	91,634	28.37
Cuban	745	6.83	2,999	7.53	15,846	4.91
All Other Hispanic or Latino	7,186	65.84	23,701	59.55	191,700	59.35
2011 Est. Hisp or Latino by Single Race Class	10,914		39,803		322,979	
White Alone	7,649	70.08	24,689	62.03	161,042	49.86
Black or African American Alone	322	2.95	1,977	4.97	15,733	4.87
American Indian and Alaska Native Alone	62	0.57	204	0.51	2,123	0.66
Asian Alone	30	0.27	159	0.40	743	0.23
Native Hawaiian and Other Pacific Islander Alone	4	0.04	51	0.13	312	0.10
Some Other Race Alone	2,221	20.35	10,035	25.21	119,072	36.87
Two or More Races	625	5.73	2,688	6.75	23,954	7.42

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Pop-Facts: Demographic Snapshot 2011 Report

Sprngfld 3,5,10-miles

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Description	0.00 - 3.00 miles		0.00 - 5.00 miles		0.00 - 10.00 miles	
	Radius 1	*%*	*Radius 2*	*%*	*Radius 3*	*%*
2011 Est. Pop. Asian Alone Race by Cat	7,263		20,823		95,496	
Chinese, except Taiwanese	1,737	23.92	4,756	22.84	20,608	21.58
Filipino	2,369	32.62	5,890	28.29	17,273	18.09
Japanese	197	2.71	594	2.85	1,328	1.39
Asian Indian	1,820	25.06	6,280	30.16	42,063	44.05
Korean	523	7.20	1,344	6.45	5,501	5.76
Vietnamese	190	2.62	548	2.63	2,154	2.26
Cambodian	3	0.04	10	0.05	37	0.04
Hmong	0	0.00	0	0.00	0	0.00
Laotian	0	0.00	0	0.00	66	0.07
Thai	32	0.44	89	0.43	362	0.38
All Other Asian Races Including 2+ Category	390	5.37	1,312	6.30	6,103	6.39
2011 Est. Population by Ancestry	103,294		343,929		1,464,143	
Pop, Arab	378	0.37	1,710	0.50	7,586	0.52
Pop, Czech	217	0.21	683	0.20	1,904	0.13
Pop, Danish	94	0.09	265	0.08	1,156	0.08
Pop, Dutch	365	0.35	965	0.28	2,776	0.19
Pop, English	3,621	3.51	10,603	3.08	24,689	1.69
Pop, French (except Basque)	823	0.80	2,153	0.63	5,448	0.37
Pop, French Canadian	220	0.21	639	0.19	1,505	0.10
Pop, German	7,563	7.32	20,504	5.96	50,746	3.47
Pop, Greek	967	0.94	2,563	0.75	6,462	0.44
Pop, Hungarian	757	0.73	2,093	0.61	6,664	0.46
Pop, Irish	10,096	9.77	31,791	9.24	82,674	5.65
Pop, Italian	16,715	16.18	44,921	13.06	134,281	9.17
Pop, Lithuanian	266	0.26	1,104	0.32	2,970	0.20
Pop, United States or American	4,292	4.16	12,745	3.71	44,008	3.01
Pop, Norwegian	329	0.32	1,111	0.32	2,676	0.18
Pop, Polish	4,875	4.72	14,993	4.36	47,077	3.22
Pop, Portuguese	2,632	2.55	7,454	2.17	41,020	2.80
Pop, Russian	3,939	3.81	8,829	2.57	21,381	1.46
Pop, Scottish	934	0.90	2,734	0.79	6,796	0.46
Pop, Scotch-Irish	630	0.61	1,687	0.49	4,511	0.31
Pop, Slovak	480	0.46	1,353	0.39	4,403	0.30
Pop, Subsaharan African	881	0.85	6,884	2.00	31,385	2.14
Pop, Swedish	385	0.37	1,122	0.33	2,733	0.19
Pop, Swiss	140	0.14	376	0.11	997	0.07
Pop, Ukrainian	957	0.93	3,034	0.88	8,170	0.56
Pop, Welsh	193	0.19	608	0.18	1,301	0.09
Pop, West Indian (exc Hisp groups)	2,424	2.35	18,072	5.25	67,995	4.64
Pop, Other ancestries	33,254	32.19	127,196	36.98	770,474	52.62

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Pop-Facts: Demographic Snapshot 2011 Report

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Description	0.00 - 3.00 miles		0.00 - 5.00 miles		0.00 - 10.00 miles	
	Radius 1	*%*	*Radius 2*	*%*	*Radius 3*	*%*
2011 Est. Population by Ancestry						
Pop, Ancestry Unclassified	4,869	4.71	15,738	4.58	80,358	5.49
2011 Est. Pop Age 5+ by Language Spoken At Home	96,174		320,302		1,360,693	
Speak Only English at Home	71,844	74.70	232,556	72.61	861,471	63.31
Speak Asian/Pac. Isl. Lang. at Home	3,647	3.79	11,118	3.47	45,269	3.33
Speak IndoEuropean Language at Home	12,323	12.81	41,287	12.89	169,778	12.48
Speak Spanish at Home	7,244	7.53	29,058	9.07	260,095	19.11
Speak Other Language at Home	1,116	1.16	6,283	1.96	24,081	1.77
2011 Est. Population by Sex	103,294		343,929		1,464,143	
Male	50,056	48.46	166,303	48.35	713,856	48.76
Female	53,238	51.54	177,626	51.65	750,287	51.24
2011 Est. Population by Age	103,294		343,929		1,464,143	
Age 0 - 4	7,121	6.89	23,626	6.87	103,450	7.07
Age 5 - 9	7,200	6.97	23,812	6.92	102,289	6.99
Age 10 - 14	6,987	6.76	22,906	6.66	97,713	6.67
Age 15 - 17	4,623	4.48	15,115	4.39	60,318	4.12
Age 18 - 20	2,997	2.90	11,951	3.47	56,021	3.83
Age 21 - 24	4,907	4.75	16,967	4.93	73,566	5.02
Age 25 - 34	10,027	9.71	37,714	10.97	195,293	13.34
Age 35 - 44	13,088	12.67	45,927	13.35	209,822	14.33
Age 45 - 54	17,041	16.50	55,519	16.14	219,322	14.98
Age 55 - 64	13,383	12.96	42,686	12.41	164,572	11.24
Age 65 - 74	7,867	7.62	23,957	6.97	96,430	6.59
Age 75 - 84	5,403	5.23	15,688	4.56	57,426	3.92
Age 85 and over	2,651	2.57	8,059	2.34	27,920	1.91
Age 16 and over	80,422	77.86	268,455	78.06	1,140,589	77.90
Age 18 and over	77,363	74.90	258,469	75.15	1,100,374	75.15
Age 21 and over	74,366	71.99	246,518	71.68	1,044,352	71.33
Age 65 and over	15,921	15.41	47,704	13.87	181,776	12.42
2011 Est. Median Age	40.95		39.33		37.07	
2011 Est. Average Age	39.70		38.80		37.50	

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Description	0.00 - 3.00 miles		0.00 - 5.00 miles		0.00 - 10.00 miles	
	Radius 1	*%*	*Radius 2*	*%*	*Radius 3*	*%*
2011 Est. Male Population by Age	50,056		166,303		713,856	
Age 0 - 4	3,694	7.38	12,125	7.29	53,198	7.45
Age 5 - 9	3,687	7.37	12,207	7.34	52,489	7.35
Age 10 - 14	3,566	7.12	11,718	7.05	49,893	6.99
Age 15 - 17	2,312	4.62	7,654	4.60	30,897	4.33
Age 18 - 20	1,553	3.10	6,139	3.69	28,630	4.01
Age 21 - 24	2,452	4.90	8,518	5.12	37,181	5.21
Age 25 - 34	5,161	10.31	19,263	11.58	99,637	13.96
Age 35 - 44	6,351	12.69	22,240	13.37	104,064	14.58
Age 45 - 54	8,279	16.54	26,703	16.06	106,584	14.93
Age 55 - 64	6,363	12.71	20,151	12.12	77,324	10.83
Age 65 - 74	3,519	7.03	10,676	6.42	42,889	6.01
Age 75 - 84	2,262	4.52	6,381	3.84	22,679	3.18
Age 85 and over	857	1.71	2,527	1.52	8,390	1.18
2011 Est. Median Age, Male	39.10		37.49		35.48	
2011 Est. Average Age, Male	38.20		37.20		36.00	
2011 Est. Female Population by Age	53,238		177,626		750,287	
Age 0 - 4	3,427	6.44	11,501	6.47	50,252	6.70
Age 5 - 9	3,513	6.60	11,605	6.53	49,800	6.64
Age 10 - 14	3,421	6.43	11,189	6.30	47,820	6.37
Age 15 - 17	2,311	4.34	7,460	4.20	29,420	3.92
Age 18 - 20	1,444	2.71	5,812	3.27	27,391	3.65
Age 21 - 24	2,454	4.61	8,450	4.76	36,386	4.85
Age 25 - 34	4,866	9.14	18,451	10.39	95,656	12.75
Age 35 - 44	6,737	12.65	23,687	13.34	105,758	14.10
Age 45 - 54	8,762	16.46	28,816	16.22	112,739	15.03
Age 55 - 64	7,020	13.19	22,535	12.69	87,248	11.63
Age 65 - 74	4,348	8.17	13,282	7.48	53,541	7.14
Age 75 - 84	3,141	5.90	9,306	5.24	34,747	4.63
Age 85 and over	1,794	3.37	5,532	3.11	19,530	2.60
2011 Est. Median Age, Female	42.69		41.06		38.63	
2011 Est. Average Age, Female	41.10		40.20		38.90	

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Description	0.00 - 3.00 miles		0.00 - 5.00 miles		0.00 - 10.00 miles	
	Radius 1	*%*	*Radius 2*	*%*	*Radius 3*	*%*
2011 Est. Pop Age 15+ by Marital Status	81,986		273,584		1,160,691	
Total, Never Married	23,236	28.34	87,354	31.93	437,300	37.68
Males, Never Married	12,370	15.09	45,371	16.58	227,022	19.56
Females, Never Married	10,866	13.25	41,983	15.35	210,278	18.12
Married, Spouse present	44,964	54.84	137,415	50.23	482,383	41.56
Married, Spouse absent	2,326	2.84	10,813	3.95	73,642	6.34
Widowed	6,075	7.41	18,666	6.82	76,938	6.63
Males Widowed	1,136	1.39	3,625	1.33	14,837	1.28
Females Widowed	4,939	6.02	15,041	5.50	62,101	5.35
Divorced	5,385	6.57	19,336	7.07	90,430	7.79
Males Divorced	1,870	2.28	6,843	2.50	34,438	2.97
Females Divorced	3,515	4.29	12,493	4.57	55,991	4.82
2011 Est. Pop. Age 25+ by Edu. Attainment	69,459		229,550		970,786	
Less than 9th grade	2,358	3.39	8,699	3.79	75,956	7.82
Some High School, no diploma	2,598	3.74	10,863	4.73	82,620	8.51
High School Graduate (or GED)	17,220	24.79	59,527	25.93	296,890	30.58
Some College, no degree	9,260	13.33	35,104	15.29	155,924	16.06
Associate Degree	3,390	4.88	13,442	5.86	53,709	5.53
Bachelor's Degree	19,676	28.33	59,782	26.04	184,133	18.97
Master's Degree	10,248	14.75	28,715	12.51	83,625	8.61
Professional School Degree	2,996	4.31	8,699	3.79	24,925	2.57
Doctorate Degree	1,714	2.47	4,720	2.06	13,004	1.34
2011 Est Pop Age 25+ by Edu. Attain, Hisp. or Lat	6,806		24,610		199,022	
Less than 9th grade	443	6.51	2,549	10.36	36,803	18.49
Some High School, no diploma	502	7.38	2,096	8.52	23,789	11.95
High School Graduate (or GED)	2,703	39.71	8,392	34.10	71,660	36.01
Some College, no degree	1,353	19.88	5,090	20.68	31,921	16.04
Associate Degree	297	4.36	1,233	5.01	8,945	4.49
Bachelor's Degree	824	12.11	3,221	13.09	16,655	8.37
Graduate or Professional Degree	684	10.05	2,031	8.25	9,249	4.65

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Description	0.00 - 3.00 miles *Radius 1*	%	0.00 - 5.00 miles *Radius 2*	%	0.00 - 10.00 miles *Radius 3*	%
Households						
2016 Projection	37,449		122,408		509,035	
2011 Estimate	37,879		124,418		513,878	
2000 Census	38,566		127,444		513,214	
1990 Census	37,288		123,137		497,080	
Growth 2011-2016	-1.14%		-1.62%		-0.94%	
Growth 2000-2011	-1.78%		-2.37%		0.13%	
Growth 1990-2000	3.43%		3.50%		3.25%	
2011 Est. Households by Household Type	37,879		124,418		513,878	
Family Households	27,776	73.33	89,982	72.32	363,243	70.69
Nonfamily Households	10,103	26.67	34,436	27.68	150,635	29.31
2011 Est. Group Quarters Population	703		4,480		35,599	
2011 HHs by Ethnicity, Hispanic/Latino	3,011	7.95	10,901	8.76	92,493	18.00
2011 Est. HHs by HH Income	37,879		124,418		513,878	
Income Less than $15,000	1,935	5.11	8,007	6.44	66,193	12.88
Income $15,000 - $24,999	2,011	5.31	7,824	6.29	45,100	8.78
Income $25,000 - $34,999	2,190	5.78	8,025	6.45	44,541	8.67
Income $35,000 - $49,999	3,500	9.24	13,233	10.64	64,795	12.61
Income $50,000 - $74,999	5,619	14.83	19,838	15.94	87,057	16.94
Income $75,000 - $99,999	5,510	14.55	17,780	14.29	64,630	12.58
Income $100,000 - $124,999	4,392	11.59	13,854	11.14	45,756	8.90
Income $125,000 - $149,999	3,231	8.53	9,847	7.91	29,919	5.82
Income $150,000 - $199,999	3,208	8.47	9,731	7.82	27,423	5.34
Income $200,000 - $499,999	4,679	12.35	12,564	10.10	30,851	6.00
Income $500,000 and more	1,606	4.24	3,713	2.98	7,613	1.48
2011 Est. Average Household Income	$128,093		$113,773		$85,357	
2011 Est. Median Household Income	$91,723		$82,425		$60,427	
2011 Est. Per Capita Income	$47,129		$41,388		$30,244	

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Description	0.00 - 3.00 miles *Radius 1*	%	0.00 - 5.00 miles *Radius 2*	%	0.00 - 10.00 miles *Radius 3*	%
2011 Median HH Inc by Single Race Class. or Ethn						
White Alone	94,859		89,305		72,392	
Black or African American Alone	62,968		63,194		43,877	
American Indian and Alaska Native Alone	63,252		69,801		56,691	
Asian Alone	107,001		96,667		92,463	
Native Hawaiian and Other Pacific Islander Alone	110,911		74,618		68,282	
Some Other Race Alone	80,720		67,260		43,408	
Two or More Races	72,184		62,466		47,506	
Hispanic or Latino	80,958		69,638		46,627	
Not Hispanic or Latino	92,858		83,954		64,284	
2011 Est. Family HH Type, Presence Own Children	27,776		89,982		363,243	
Married-Couple Family, own children	10,728	38.62	33,794	37.56	115,754	31.87
Married-Couple Family, no own children	11,807	42.51	34,971	38.86	122,018	33.59
Male Householder, own children	401	1.44	2,028	2.25	13,344	3.67
Male Householder, no own children	912	3.28	3,488	3.88	18,745	5.16
Female Householder, own children	1,662	5.98	7,471	8.30	51,683	14.23
Female Householder, no own children	2,266	8.16	8,229	9.15	41,700	11.48
2011 Est. Households by Household Size	37,879		124,418		513,878	
1-person household	8,460	22.33	28,968	23.28	125,615	24.44
2-person household	11,868	31.33	37,080	29.80	141,560	27.55
3-person household	6,728	17.76	22,306	17.93	94,065	18.30
4-person household	6,302	16.64	20,512	16.49	81,115	15.78
5-person household	3,044	8.04	9,969	8.01	41,850	8.14
6-person household	1,010	2.67	3,574	2.87	17,431	3.39
7 or more person household	467	1.23	2,010	1.62	12,243	2.38
2011 Est. Average Household Size	2.71		2.73		2.78	

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Description	0.00 - 3.00 miles		0.00 - 5.00 miles		0.00 - 10.00 miles	
	Radius 1	*%*	*Radius 2*	*%*	*Radius 3*	*%*
2011 Est. Households by Presence of People	37,879		124,418		513,878	
Households with 1 or more People under Age 18:	12,973	34.25	44,701	35.93	196,141	38.17
Married-Couple Family	10,593	81.65	33,673	75.33	118,963	60.65
Other Family, Male Householder	463	3.57	2,365	5.29	15,857	8.08
Other Family, Female Householder	1,859	14.33	8,477	18.96	60,369	30.78
Nonfamily, Male Householder	50	0.39	147	0.33	600	0.31
Nonfamily, Female Householder	8	0.06	39	0.09	352	0.18
Households no People under Age 18:	24,906	65.75	79,717	64.07	317,737	61.83
Married-Couple Family	11,315	45.43	33,254	41.72	114,047	35.89
Other Family, Male Householder	815	3.27	2,999	3.76	15,627	4.92
Other Family, Female Householder	1,947	7.82	6,792	8.52	31,166	9.81
Nonfamily, Male Householder	4,230	16.98	14,922	18.72	70,699	22.25
Nonfamily, Female Householder	6,599	26.50	21,749	27.28	86,198	27.13
2011 Est. Households by Number of Vehicles	37,879		124,418		513,878	
No Vehicles	2,134	5.63	9,748	7.83	89,640	17.44
1 Vehicle	12,641	33.37	44,872	36.07	194,781	37.90
2 Vehicles	16,650	43.96	50,272	40.41	162,305	31.58
3 Vehicles	4,549	12.01	14,211	11.42	48,815	9.50
4 Vehicles	1,548	4.09	4,158	3.34	13,995	2.72
5 or more Vehicles	357	0.94	1,157	0.93	4,342	0.84
2011 Est. Average Number of Vehicles	1.79		1.70		1.46	
Family Households						
2016 Projection	27,428		88,435		359,920	
2011 Estimate	27,776		89,982		363,243	
2000 Census	28,301		92,232		362,576	
1990 Census	27,771		90,498		354,695	
Growth 2011-2016	-1.25%		-1.72%		-0.91%	
Growth 2000-2011	-1.86%		-2.44%		0.18%	
Growth 1990-2000	1.91%		1.92%		2.22%	
2011 Est. Families by Poverty Status	27,776		89,982		363,243	
2011 Families at or Above Poverty	27,223	98.01	86,775	96.44	329,491	90.71
2011 Families at or Above Poverty with Children	13,038	46.94	43,117	47.92	170,742	47.00
2011 Families Below Poverty	553	1.99	3,207	3.56	33,753	9.29
2011 Families Below Poverty with Children	429	1.54	2,429	2.70	27,172	7.48

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Pop-Facts: Demographic Snapshot 2011 Report

Sprngfld 3,5,10-miles

Radius 1: MOUNTAIN AVE AT RICHLAND DR, SPRINGFIELD, NJ 07081, aggregate
Radius 2: MOUNTAIN AVE AT RICHLAND DR, SPRINGFIELD, NJ 07081, aggregate
Radius 3: MOUNTAIN AVE AT RICHLAND DR, SPRINGFIELD, NJ 07081, aggregate

Description	0.00 - 3.00 miles		0.00 - 5.00 miles		0.00 - 10.00 miles	
	Radius 1	*%*	*Radius 2*	*%*	*Radius 3*	*%*
2011 Est. Pop Age 16+ by Employment Status	80,422		268,455		1,140,589	
In Armed Forces	19	0.02	91	0.03	390	0.03
Civilian - Employed	52,405	65.16	176,749	65.84	684,714	60.03
Civilian - Unemployed	2,632	3.27	11,192	4.17	73,164	6.41
Not in Labor Force	25,365	31.54	80,424	29.96	382,320	33.52
2011 Est. Civ Employed Pop 16+ Class of Worker	49,800		168,708		655,354	
For-Profit Private Workers	35,827	71.94	120,837	71.62	484,417	73.92
Non-Profit Private Workers	3,706	7.44	12,715	7.54	43,888	6.70
Local Government Workers	4,043	8.12	14,569	8.64	53,664	8.19
State Government Workers	1,644	3.30	7,446	4.41	29,245	4.46
Federal Government Workers	632	1.27	2,796	1.66	12,673	1.93
Self-Emp Workers	6,229	12.51	16,683	9.89	52,652	8.03
Unpaid Family Workers	241	0.48	527	0.31	1,405	0.21
2011 Est. Civ Employed Pop 16+ by Occupation	49,800		168,708		655,354	
Architect/Engineer	645	1.30	2,421	1.44	8,543	1.30
Arts/Entertain/Sports	1,330	2.67	3,845	2.28	11,715	1.79
Building Grounds Maint	1,505	3.02	5,330	3.16	29,772	4.54
Business/Financial Ops	3,721	7.47	10,859	6.44	33,353	5.09
Community/Soc Svcs	855	1.72	3,425	2.03	12,373	1.89
Computer/Mathematical	1,690	3.39	5,461	3.24	19,585	2.99
Construction/Extraction	2,071	4.16	6,886	4.08	32,884	5.02
Edu/Training/Library	3,794	7.62	12,640	7.49	40,218	6.14
Farm/Fish/Forestry	29	0.06	96	0.06	568	0.09
Food Prep/Serving	1,372	2.76	5,468	3.24	26,955	4.11
Health Practitioner/Tec	2,690	5.40	9,055	5.37	30,082	4.59
Healthcare Support	763	1.53	3,819	2.26	19,410	2.96
Maintenance Repair	941	1.89	3,564	2.11	18,146	2.77
Legal	1,635	3.28	4,477	2.65	10,592	1.62
Life/Phys/Soc Science	930	1.87	2,599	1.54	7,550	1.15
Management	7,037	14.13	20,561	12.19	59,693	9.11
Office/Admin Support	6,326	12.70	24,610	14.59	100,739	15.37
Production	1,464	2.94	6,004	3.56	34,570	5.28
Protective Svcs	1,281	2.57	4,620	2.74	19,416	2.96
Sales/Related	6,591	13.23	19,846	11.76	69,616	10.62
Personal Care/Svc	1,459	2.93	5,082	3.01	21,744	3.32
Transportation/Moving	1,669	3.35	8,041	4.77	47,829	7.30

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Pop-Facts: Demographic Snapshot 2011 Report

Sprngfld 3,5,10-miles

Radius 1: MOUNTAIN AVE AT RICHLAND DR, SPRINGFIELD, NJ 07081, aggregate
Radius 2: MOUNTAIN AVE AT RICHLAND DR, SPRINGFIELD, NJ 07081, aggregate
Radius 3: MOUNTAIN AVE AT RICHLAND DR, SPRINGFIELD, NJ 07081, aggregate

Description	0.00 - 3.00 miles		0.00 - 5.00 miles		0.00 - 10.00 miles	
	Radius 1	*%*	*Radius 2*	*%*	*Radius 3*	*%*
2011 Est. Pop 16+ by Occupation Classification	49,800		168,708		655,354	
Blue Collar	6,145	12.34	24,495	14.52	133,429	20.36
White Collar	37,245	74.79	119,798	71.01	404,058	61.65
Service and Farm	6,410	12.87	24,415	14.47	117,866	17.99
2011 Est. Workers Age 16+, Transp. To Work	49,020		165,633		639,527	
Drove Alone	34,885	71.16	114,335	69.03	407,549	63.73
Car Pooled	2,829	5.77	11,550	6.97	61,424	9.60
Public Transportation	6,375	13.00	23,090	13.94	100,443	15.71
Walked	1,284	2.62	4,992	3.01	26,707	4.18
Bicycle	56	0.11	235	0.14	1,301	0.20
Other Means	1,134	2.31	4,781	2.89	22,864	3.58
Worked at Home	2,458	5.01	6,651	4.02	19,238	3.01
2011 Est. Workers Age 16+ by Travel Time to Work *						
Less than 15 Minutes	11,586		37,210		134,319	
15 - 29 Minutes	16,111		53,654		211,803	
30 - 44 Minutes	9,078		33,475		139,967	
45 - 59 Minutes	3,564		13,225		52,313	
60 or more Minutes	6,638		22,463		85,213	
2011 Est. Avg Travel Time to Work in Minutes	31.77		32.47		32.71	
2011 Est. Tenure of Occupied Housing Units	37,879		124,418		513,878	
Owner Occupied	29,869	78.85	89,476	71.92	281,032	54.69
Renter Occupied	8,010	21.15	34,942	28.08	232,847	45.31
2011 Owner Occ. HUs: Avg. Length of Residence	20		20		18	
2011 Renter Occ. HUs: Avg. Length of Residence	9		9		9	

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Pop-Facts: Demographic Snapshot 2011 Report

Sprngfld 3,5,10-miles

Radius 1: MOUNTAIN AVE AT RICHLAND DR, SPRINGFIELD, NJ 07081, aggregate
Radius 2: MOUNTAIN AVE AT RICHLAND DR, SPRINGFIELD, NJ 07081, aggregate
Radius 3: MOUNTAIN AVE AT RICHLAND DR, SPRINGFIELD, NJ 07081, aggregate

Description	0.00 - 3.00 miles		0.00 - 5.00 miles		0.00 - 10.00 miles	
	Radius 1	*%*	*Radius 2*	*%*	*Radius 3*	*%*
2011 Est. All Owner-Occupied Housing Values	29,869		89,476		281,032	
Value Less than $20,000	33	0.11	86	0.10	514	0.18
Value $20,000 - $39,999	43	0.14	119	0.13	1,008	0.36
Value $40,000 - $59,999	48	0.16	126	0.14	877	0.31
Value $60,000 - $79,999	80	0.27	165	0.18	1,086	0.39
Value $80,000 - $99,999	51	0.17	243	0.27	1,247	0.44
Value $100,000 - $149,999	268	0.90	1,045	1.17	6,035	2.15
Value $150,000 - $199,999	893	2.99	3,789	4.23	18,827	6.70
Value $200,000 - $299,999	3,928	13.15	16,513	18.46	68,403	24.34
Value $300,000 - $399,999	6,391	21.40	20,829	23.28	68,021	24.20
Value $400,000 - $499,999	4,548	15.23	12,797	14.30	36,848	13.11
Value $500,000 - $749,999	6,257	20.95	16,790	18.76	44,659	15.89
Value $750,000 - $999,999	3,512	11.76	8,843	9.88	18,724	6.66
Value $1,000,000 or more	3,816	12.78	8,131	9.09	14,784	5.26
2011 Est. Median All Owner-Occupied Housing Value	$470,338		$414,244		$362,511	
2011 Est. Housing Units by Units in Structure	39,423		129,862		553,995	
1 Unit Attached	1,591	4.04	4,849	3.73	32,482	5.86
1 Unit Detached	27,531	69.83	81,430	62.71	231,842	41.85
2 Units	4,046	10.26	14,764	11.37	82,847	14.95
3 or 4 Units	1,932	4.90	9,271	7.14	69,170	12.49
5 to 19 Units	1,621	4.11	7,306	5.63	57,493	10.38
20 to 49 Units	1,057	2.68	4,356	3.35	30,459	5.50
50 or More Units	1,431	3.63	7,500	5.78	47,762	8.62
Mobile Home or Trailer	190	0.48	321	0.25	1,741	0.31
Boat, RV, Van, etc.	23	0.06	65	0.05	200	0.04
2011 Est. Housing Units by Year Structure Built	39,423		129,862		553,995	
Housing Unit Built 2000 or later	1,419	3.60	5,126	3.95	38,160	6.89
Housing Unit Built 1990 to 1999	1,126	2.86	4,252	3.27	26,439	4.77
Housing Unit Built 1980 to 1989	1,847	4.69	5,609	4.32	35,147	6.34
Housing Unit Built 1970 to 1979	2,552	6.47	8,384	6.46	49,227	8.89
Housing Unit Built 1960 to 1969	5,086	12.90	16,885	13.00	81,210	14.66
Housing Unit Built 1950 to 1959	11,496	29.16	33,648	25.91	115,257	20.80
Housing Unit Built 1940 to 1949	5,687	14.43	20,833	16.04	74,052	13.37
Housing Unit Built 1939 or Earlier	10,211	25.90	35,124	27.05	134,502	24.28
2011 Est. Median Year Structure Built **	1953		1953		1956	

**1939 will appear when at least half of the Housing Units in this reports area were built in 1939 or earlier.

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Appendix: Area Listing

Area Name:

Type: Radius 1 | Reporting Detail: Aggregate | Reporting Level: Block Group

Radius Definition:

MOUNTAIN AVE AT RICHLAND DR
SPRINGFIELD, NJ 07081

Latitude/Longitude 40.699260 -74.322781
Radius 0.00 - 3.00

Area Name:

Type: Radius 2 | Reporting Detail: Aggregate | Reporting Level: Block Group

Radius Definition:

MOUNTAIN AVE AT RICHLAND DR
SPRINGFIELD, NJ 07081

Latitude/Longitude 40.699260 -74.322781
Radius 0.00 - 5.00

Area Name:

Type: Radius 3 | Reporting Detail: Aggregate | Reporting Level: Block Group

Radius Definition:

MOUNTAIN AVE AT RICHLAND DR
SPRINGFIELD, NJ 07081

Latitude/Longitude 40.699260 -74.322781
Radius 0.00 - 10.00

Project Information:

Site: 1

Order Number: 970855353

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Appendix D

Syndicated Data: Supply & Demand

Springfield

3-, 5-, 10-mile Radius

RMP Opportunity Gap - Retail Stores

Springfield Township

Place (see appendix for geographies), Total

	2011 Demand (Consumer Expenditures)	2011 Supply (Retail Sales)	Opportunity Gap/Surplus
Total Retail Sales Incl Eating and Drinking Places	298,614,099	559,217,126	(260,603,027)
Motor Vehicle and Parts Dealers-441	51,669,856	213,030,691	(161,360,835)
Automotive Dealers-4411	46,300,926	212,055,988	(165,755,062)
Other Motor Vehicle Dealers-4412	1,350,786	181,712	1,169,074
Automotive Parts/Accsrs, Tire Stores-4413	4,018,144	792,991	3,225,153
Furniture and Home Furnishings Stores-442	7,153,684	14,997,638	(7,843,954)
Furniture Stores-4421	4,054,793	7,757,811	(3,703,018)
Home Furnishing Stores-4422	3,098,891	7,239,827	(4,140,936)
Electronics and Appliance Stores-443	6,992,714	14,437,446	(7,444,732)
Appliances, TVs, Electronics Stores-44311	5,125,261	12,927,670	(7,802,409)
Household Appliances Stores-443111	1,198,255	4,211,447	(3,013,192)
Radio, Television, Electronics Stores-443112	3,927,006	8,716,223	(4,789,217)
Computer and Software Stores-44312	1,527,622	1,509,776	17,846
Camera and Photographic Equipment Stores-44313	339,831	0	339,831
Building Material, Garden Equip Stores -444	29,613,497	25,306,340	4,307,157
Building Material and Supply Dealers-4441	27,156,049	24,305,496	2,850,553
Home Centers-44411	10,966,565	3,327,765	7,638,800
Paint and Wallpaper Stores-44412	682,652	310,494	372,158
Hardware Stores-44413	2,604,467	288,027	2,316,440
Other Building Materials Dealers-44419	12,902,365	20,379,210	(7,476,845)
Building Materials, Lumberyards-444191	4,992,127	7,968,269	(2,976,142)
Lawn, Garden Equipment, Supplies Stores-4442	2,457,448	1,000,844	1,456,604
Outdoor Power Equipment Stores-44421	193,417	0	193,417
Nursery and Garden Centers-44422	2,264,031	1,000,844	1,263,187
Food and Beverage Stores-445	37,109,028	69,116,873	(32,007,845)
Grocery Stores-4451	33,641,722	43,791,163	(10,149,441)
Supermarkets, Grocery (Ex Conv) Stores-44511	32,055,103	42,562,229	(10,507,126)
Convenience Stores-44512	1,586,619	1,228,934	357,685
Specialty Food Stores-4452	1,061,822	2,017,698	(955,876)
Beer, Wine and Liquor Stores-4453	2,405,484	23,308,012	(20,902,528)
Health and Personal Care Stores-446	16,516,788	18,754,738	(2,237,950)
Pharmacies and Drug Stores-44611	14,180,219	15,522,915	(1,342,696)
Cosmetics, Beauty Supplies, Perfume Stores-44612	590,330	162,146	428,184
Optical Goods Stores-44613	691,613	2,173,893	(1,482,280)
Other Health and Personal Care Stores-44619	1,054,626	895,784	158,842

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RMP Opportunity Gap - Retail Stores

Springfield Township

Place (see appendix for geographies), Total

	2011 Demand (Consumer Expenditures)	2011 Supply (Retail Sales)	Opportunity Gap/Surplus
Gasoline Stations-447	25,315,847	23,684,837	1,631,010
Gasoline Stations With Conv Stores-44711	18,839,540	15,609,338	3,230,202
Other Gasoline Stations-44719	6,476,307	8,075,499	(1,599,192)
Clothing and Clothing Accessories Stores-448	15,339,805	72,314,491	(56,974,686)
Clothing Stores-4481	10,634,626	46,915,646	(36,281,020)
Men's Clothing Stores-44811	713,526	38,685,428	(37,971,902)
Women's Clothing Stores-44812	2,680,874	3,419,447	(738,573)
Childrens, Infants Clothing Stores-44813	564,373	0	564,373
Family Clothing Stores-44814	5,699,425	4,085,790	1,613,635
Clothing Accessories Stores-44815	269,219	156,027	113,192
Other Clothing Stores-44819	707,209	568,954	138,255
Shoe Stores-4482	1,847,587	2,934,769	(1,087,182)
Jewelry, Luggage, Leather Goods Stores-4483	2,857,592	22,464,076	(19,606,484)
Jewelry Stores-44831	2,683,688	22,464,076	(19,780,388)
Luggage and Leather Goods Stores-44832	173,904	0	173,904
Sporting Goods, Hobby, Book, Music Stores-451	6,206,918	37,582,325	(31,375,407)
Sportng Goods, Hobby, Musical Inst Stores-4511	4,294,571	29,665,593	(25,371,022)
Sporting Goods Stores-45111	2,241,187	20,702,766	(18,461,579)
Hobby, Toys and Games Stores-45112	1,318,961	1,000,678	318,283
Sew/Needlework/Piece Goods Stores-45113	301,215	162,868	138,347
Musical Instrument and Supplies Stores-45114	433,208	7,799,281	(7,366,073)
Book, Periodical and Music Stores-4512	1,912,347	7,916,732	(6,004,385)
Book Stores and News Dealers-45121	1,290,518	7,916,732	(6,626,214)
Book Stores-451211	1,229,263	7,916,732	(6,687,469)
News Dealers and Newsstands-451212	61,255	0	61,255
Prerecorded Tapes, CDs, Record Stores-45122	621,829	0	621,829
General Merchandise Stores-452	39,446,950	7,118,160	32,328,790
Department Stores Excl Leased Depts-4521	19,826,878	1,740,034	18,086,844
Other General Merchandise Stores-4529	19,620,072	5,378,126	14,241,946
Miscellaneous Store Retailers-453	7,785,199	18,901,733	(11,116,534)
Florists-4531	646,422	324,670	321,752
Office Supplies, Stationery, Gift Stores-4532	3,397,485	17,912,252	(14,514,767)
Office Supplies and Stationery Stores-45321	1,967,849	16,969,986	(15,002,137)
Gift, Novelty and Souvenir Stores-45322	1,429,636	942,266	487,370
Used Merchandise Stores-4533	725,604	174,859	550,745
Other Miscellaneous Store Retailers-4539	3,015,688	489,952	2,525,736
Non-Store Retailers-454	23,125,773	701,883	22,423,890
Foodservice and Drinking Places-722	32,338,040	43,269,971	(10,931,931)
Full-Service Restaurants-7221	14,697,652	13,280,406	1,417,246

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RMP Opportunity Gap - Retail Stores

Springfield Township

Place (see appendix for geographies), Total

	2011 Demand (Consumer Expenditures)	2011 Supply (Retail Sales)	Opportunity Gap/Surplus
Limited-Service Eating Places-7222	13,549,466	22,496,556	(8,947,090)
Special Foodservices-7223	2,669,911	7,493,009	(4,823,098)
Drinking Places -Alcoholic Beverages-7224	1,421,011	0	1,421,011
GAFO *	78,537,556	164,362,312	(85,824,756)
General Merchandise Stores-452	39,446,950	7,118,160	32,328,790
Clothing and Clothing Accessories Stores-448	15,339,805	72,314,491	(56,974,686)
Furniture and Home Furnishings Stores-442	7,153,684	14,997,638	(7,843,954)
Electronics and Appliance Stores-443	6,992,714	14,437,446	(7,444,732)
Sporting Goods, Hobby, Book, Music Stores-451	6,206,918	37,582,325	(31,375,407)
Office Supplies, Stationery, Gift Stores-4532	3,397,485	17,912,252	(14,514,767)

* GAFO (General merchandise, Apparel, Furniture and Other) represents sales at stores that sell merchandise normally sold in department stores. This category is not included in Total Retail Sales Including Eating and Drinking Places.

Nielsen' RMP data is derived from two major sources of information. The demand data is derived from the Consumer Expenditure Survey (CE Survey), which is fielded by the U.S. Bureau of Labor Statistics (BLS). The supply data is derived from the Census of Retail Trade (CRT), which is made available by the U.S. Census.Additional data sources are incorporated to create both supply and demand estimates.

The difference between demand and supply represents the opportunity gap or surplus available for each retail outlet in the specified reporting geography. When the demand is greater than (less than) the supply, there is an opportunity gap (surplus) for that retail outlet. For example, a positive value signifies an opportunity gap, while a negative value signifies a surplus.

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RMP Opportunity Gap - Retail Stores

Springfield Township

Appendix: Area Listing

Area Name:

Type: List - Place Reporting Detail: Aggregate Reporting Level: Place

Geography Code	Geography Name	Geography Code	Geography Name
3470050	Springfield CDP		

Project Information:

Site: 3

Order Number: 970855353

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RMP Opportunity Gap - Retail Stores

Sprngfld 3,5,10-miles

Radius 1: MOUNTAIN AVE AT RICHLAND DR, SPRINGFIELD, NJ 07081, 0.00 - 3.00 Miles, Total

	2011 Demand (Consumer Expenditures)	2011 Supply (Retail Sales)	Opportunity Gap/Surplus
Total Retail Sales Incl Eating and Drinking Places	1,925,857,670	2,661,104,570	(735,246,900)
Motor Vehicle and Parts Dealers-441	342,464,870	821,676,789	(479,211,919)
Automotive Dealers-4411	304,533,337	786,013,880	(481,480,543)
Other Motor Vehicle Dealers-4412	12,706,327	1,130,111	11,576,216
Automotive Parts/Accsrs, Tire Stores-4413	25,225,207	34,532,797	(9,307,590)
Furniture and Home Furnishings Stores-442	47,327,053	78,129,934	(30,802,881)
Furniture Stores-4421	27,140,761	54,724,034	(27,583,273)
Home Furnishing Stores-4422	20,186,292	23,405,900	(3,219,608)
Electronics and Appliance Stores-443	45,288,900	120,471,725	(75,182,825)
Appliances, TVs, Electronics Stores-44311	33,300,663	89,521,285	(56,220,622)
Household Appliances Stores-443111	7,733,994	20,112,570	(12,378,576)
Radio, Television, Electronics Stores-443112	25,566,668	69,408,715	(43,842,047)
Computer and Software Stores-44312	9,807,953	30,299,079	(20,491,126)
Camera and Photographic Equipment Stores-44313	2,180,285	651,361	1,528,924
Building Material, Garden Equip Stores -444	191,238,981	85,596,959	105,642,022
Building Material and Supply Dealers-4441	175,029,891	82,906,888	92,123,003
Home Centers-44411	70,872,603	21,154,966	49,717,637
Paint and Wallpaper Stores-44412	4,365,272	1,977,914	2,387,358
Hardware Stores-44413	16,893,466	5,536,556	11,356,910
Other Building Materials Dealers-44419	82,898,549	54,237,452	28,661,097
Building Materials, Lumberyards-444191	31,405,292	21,206,851	10,198,441
Lawn, Garden Equipment, Supplies Stores-4442	16,209,090	2,690,071	13,519,019
Outdoor Power Equipment Stores-44421	1,667,515	287,388	1,380,127
Nursery and Garden Centers-44422	14,541,575	2,402,683	12,138,892
Food and Beverage Stores-445	234,766,230	247,006,267	(12,240,037)
Grocery Stores-4451	212,887,341	176,511,777	36,375,564
Supermarkets, Grocery (Ex Conv) Stores-44511	202,922,834	168,847,051	34,075,783
Convenience Stores-44512	9,964,508	7,664,726	2,299,782
Specialty Food Stores-4452	6,753,810	15,816,883	(9,063,073)
Beer, Wine and Liquor Stores-4453	15,125,079	54,677,607	(39,552,528)
Health and Personal Care Stores-446	100,809,265	159,748,669	(58,939,404)
Pharmacies and Drug Stores-44611	86,278,126	120,854,057	(34,575,931)
Cosmetics, Beauty Supplies, Perfume Stores-44612	3,575,949	16,101,469	(12,525,520)
Optical Goods Stores-44613	4,528,204	10,586,164	(6,057,960)
Other Health and Personal Care Stores-44619	6,426,986	12,206,979	(5,779,993)

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RMP Opportunity Gap - Retail Stores

Sprngfld 3,5,10-miles

Radius 1: MOUNTAIN AVE AT RICHLAND DR, SPRINGFIELD, NJ 07081, 0.00 - 3.00 Miles, Total

	2011 Demand (Consumer Expenditures)	2011 Supply (Retail Sales)	Opportunity Gap/Surplus
Gasoline Stations-447	159,526,685	113,872,918	45,653,767
Gasoline Stations With Conv Stores-44711	118,598,987	49,812,552	68,786,435
Other Gasoline Stations-44719	40,927,699	64,060,366	(23,132,667)
Clothing and Clothing Accessories Stores-448	104,326,019	313,873,642	(209,547,623)
Clothing Stores-4481	72,312,151	227,776,150	(155,463,999)
Men's Clothing Stores-44811	4,805,199	57,067,078	(52,261,879)
Women's Clothing Stores-44812	18,301,064	65,135,272	(46,834,208)
Childrens, Infants Clothing Stores-44813	3,875,017	12,593,180	(8,718,163)
Family Clothing Stores-44814	38,717,004	83,593,110	(44,876,106)
Clothing Accessories Stores-44815	1,833,877	1,991,667	(157,790)
Other Clothing Stores-44819	4,779,990	7,395,843	(2,615,853)
Shoe Stores-4482	12,732,806	28,690,833	(15,958,027)
Jewelry, Luggage, Leather Goods Stores-4483	19,281,061	57,406,659	(38,125,598)
Jewelry Stores-44831	18,139,995	50,750,315	(32,610,320)
Luggage and Leather Goods Stores-44832	1,141,066	6,656,344	(5,515,278)
Sporting Goods, Hobby, Book, Music Stores-451	41,298,144	78,642,270	(37,344,126)
Sportng Goods, Hobby, Musical Inst Stores-4511	28,633,135	57,960,291	(29,327,156)
Sporting Goods Stores-45111	15,109,435	27,431,416	(12,321,981)
Hobby, Toys and Games Stores-45112	8,649,316	7,705,286	944,030
Sew/Needlework/Piece Goods Stores-45113	1,942,820	2,621,378	(678,558)
Musical Instrument and Supplies Stores-45114	2,931,565	20,202,211	(17,270,646)
Book, Periodical and Music Stores-4512	12,665,009	20,681,979	(8,016,970)
Book Stores and News Dealers-45121	8,505,621	16,180,389	(7,674,768)
Book Stores-451211	8,116,240	13,901,579	(5,785,339)
News Dealers and Newsstands-451212	389,382	2,278,809	(1,889,427)
Prerecorded Tapes, CDs, Record Stores-45122	4,159,388	4,501,590	(342,202)
General Merchandise Stores-452	256,730,841	292,199,027	(35,468,186)
Department Stores Excl Leased Depts-4521	131,089,261	240,393,802	(109,304,541)
Other General Merchandise Stores-4529	125,641,580	51,805,225	73,836,355
Miscellaneous Store Retailers-453	49,670,823	48,832,647	838,176
Florists-4531	4,144,155	3,556,246	587,909
Office Supplies, Stationery, Gift Stores-4532	21,765,695	39,100,441	(17,334,746)
Office Supplies and Stationery Stores-45321	12,494,812	33,582,595	(21,087,783)
Gift, Novelty and Souvenir Stores-45322	9,270,883	5,517,845	3,753,038
Used Merchandise Stores-4533	4,861,249	920,756	3,940,493
Other Miscellaneous Store Retailers-4539	18,899,724	5,255,204	13,644,520
Non-Store Retailers-454	148,402,145	53,456,050	94,946,095
Foodservice and Drinking Places-722	204,007,715	247,597,673	(43,589,958)
Full-Service Restaurants-7221	92,706,544	85,647,419	7,059,125

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RMP Opportunity Gap - Retail Stores

Sprngfld 3,5,10-miles

Radius 1: MOUNTAIN AVE AT RICHLAND DR, SPRINGFIELD, NJ 07081, 0.00 - 3.00 Miles, Total

	2011 Demand (Consumer Expenditures)	2011 Supply (Retail Sales)	Opportunity Gap/Surplus
Limited-Service Eating Places-7222	85,535,517	103,365,822	(17,830,305)
Special Foodservices-7223	16,849,188	52,070,562	(35,221,374)
Drinking Places -Alcoholic Beverages-7224	8,916,467	6,513,870	2,402,597
GAFO *	516,736,652	922,417,038	(405,680,386)
General Merchandise Stores-452	256,730,841	292,199,027	(35,468,186)
Clothing and Clothing Accessories Stores-448	104,326,019	313,873,642	(209,547,623)
Furniture and Home Furnishings Stores-442	47,327,053	78,129,934	(30,802,881)
Electronics and Appliance Stores-443	45,288,900	120,471,725	(75,182,825)
Sporting Goods, Hobby, Book, Music Stores-451	41,298,144	78,642,270	(37,344,126)
Office Supplies, Stationery, Gift Stores-4532	21,765,695	39,100,441	(17,334,746)

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RMP Opportunity Gap - Retail Stores

Sprngfld 3,5,10-miles

Radius 2: MOUNTAIN AVE AT RICHLAND DR, SPRINGFIELD, NJ 07081, 0.00 - 5.00 Miles, Total

	2011 Demand (Consumer Expenditures)	2011 Supply (Retail Sales)	Opportunity Gap/Surplus
Total Retail Sales Incl Eating and Drinking Places	5,985,548,739	5,575,248,904	410,299,835
Motor Vehicle and Parts Dealers-441	1,043,188,400	1,077,935,024	(34,746,624)
Automotive Dealers-4411	931,302,766	1,019,054,631	(87,751,865)
Other Motor Vehicle Dealers-4412	35,368,554	3,010,649	32,357,905
Automotive Parts/Accsrs, Tire Stores-4413	76,517,080	55,869,744	20,647,336
Furniture and Home Furnishings Stores-442	142,468,820	121,493,586	20,975,234
Furniture Stores-4421	81,234,445	81,600,535	(366,090)
Home Furnishing Stores-4422	61,234,375	39,893,051	21,341,324
Electronics and Appliance Stores-443	140,285,732	202,268,121	(61,982,389)
Appliances, TVs, Electronics Stores-44311	102,843,801	150,612,915	(47,769,114)
Household Appliances Stores-443111	23,690,453	36,446,743	(12,756,290)
Radio, Television, Electronics Stores-443112	79,153,349	114,166,172	(35,012,823)
Computer and Software Stores-44312	30,673,293	50,236,361	(19,563,068)
Camera and Photographic Equipment Stores-44313	6,768,638	1,418,845	5,349,793
Building Material, Garden Equip Stores -444	579,457,271	309,670,941	269,786,330
Building Material and Supply Dealers-4441	530,059,388	302,540,111	227,519,277
Home Centers-44411	215,228,110	137,041,649	78,186,461
Paint and Wallpaper Stores-44412	13,092,515	11,804,060	1,288,455
Hardware Stores-44413	51,754,590	13,785,859	37,968,731
Other Building Materials Dealers-44419	249,984,173	139,908,543	110,075,630
Building Materials, Lumberyards-444191	94,907,300	54,704,268	40,203,032
Lawn, Garden Equipment, Supplies Stores-4442	49,397,882	7,130,829	42,267,053
Outdoor Power Equipment Stores-44421	4,697,734	1,371,910	3,325,824
Nursery and Garden Centers-44422	44,700,149	5,758,919	38,941,230
Food and Beverage Stores-445	745,404,412	1,159,739,538	(414,335,126)
Grocery Stores-4451	676,715,475	977,536,934	(300,821,459)
Supermarkets, Grocery (Ex Conv) Stores-44511	644,954,257	938,370,438	(293,416,181)
Convenience Stores-44512	31,761,218	39,166,495	(7,405,277)
Specialty Food Stores-4452	21,534,240	43,664,774	(22,130,534)
Beer, Wine and Liquor Stores-4453	47,154,697	138,537,830	(91,383,133)
Health and Personal Care Stores-446	313,374,315	377,933,942	(64,559,627)
Pharmacies and Drug Stores-44611	268,051,273	296,641,026	(28,589,753)
Cosmetics, Beauty Supplies, Perfume Stores-44612	11,088,649	27,445,983	(16,357,334)
Optical Goods Stores-44613	14,225,032	18,298,815	(4,073,783)
Other Health and Personal Care Stores-44619	20,009,361	35,548,118	(15,538,757)

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RMP Opportunity Gap - Retail Stores

Sprngfld 3,5,10-miles

Radius 2: MOUNTAIN AVE AT RICHLAND DR, SPRINGFIELD, NJ 07081, 0.00 - 5.00 Miles, Total

	2011 Demand (Consumer Expenditures)	2011 Supply (Retail Sales)	Opportunity Gap/Surplus
Gasoline Stations-447	507,778,662	282,978,672	224,799,990
Gasoline Stations With Conv Stores-44711	377,851,730	112,472,457	265,379,273
Other Gasoline Stations-44719	129,926,932	170,506,215	(40,579,283)
Clothing and Clothing Accessories Stores-448	326,908,712	598,009,890	(271,101,178)
Clothing Stores-4481	228,574,661	451,809,465	(223,234,804)
Men's Clothing Stores-44811	15,090,621	66,092,546	(51,001,925)
Women's Clothing Stores-44812	58,072,333	115,182,807	(57,110,474)
Childrens, Infants Clothing Stores-44813	12,253,676	44,040,034	(31,786,358)
Family Clothing Stores-44814	122,273,213	203,139,526	(80,866,313)
Clothing Accessories Stores-44815	5,748,170	4,983,118	765,052
Other Clothing Stores-44819	15,136,647	18,371,435	(3,234,788)
Shoe Stores-4482	41,004,605	57,445,674	(16,441,069)
Jewelry, Luggage, Leather Goods Stores-4483	57,329,446	88,754,751	(31,425,305)
Jewelry Stores-44831	53,806,399	74,500,397	(20,693,998)
Luggage and Leather Goods Stores-44832	3,523,047	14,254,354	(10,731,307)
Sporting Goods, Hobby, Book, Music Stores-451	127,178,437	150,737,804	(23,559,367)
Sportng Goods, Hobby, Musical Inst Stores-4511	88,143,120	100,491,028	(12,347,908)
Sporting Goods Stores-45111	46,532,313	33,187,876	13,344,437
Hobby, Toys and Games Stores-45112	26,908,611	38,084,353	(11,175,742)
Sew/Needlework/Piece Goods Stores-45113	5,863,605	4,413,814	1,449,791
Musical Instrument and Supplies Stores-45114	8,838,591	24,804,985	(15,966,394)
Book, Periodical and Music Stores-4512	39,035,317	50,246,776	(11,211,459)
Book Stores and News Dealers-45121	26,358,348	41,919,268	(15,560,920)
Book Stores-451211	25,137,326	35,133,874	(9,996,548)
News Dealers and Newsstands-451212	1,221,022	6,785,394	(5,564,372)
Prerecorded Tapes, CDs, Record Stores-45122	12,676,969	8,327,508	4,349,461
General Merchandise Stores-452	806,681,463	453,739,728	352,941,735
Department Stores Excl Leased Depts-4521	410,739,468	382,693,772	28,045,696
Other General Merchandise Stores-4529	395,941,995	71,045,956	324,896,039
Miscellaneous Store Retailers-453	153,769,738	95,188,780	58,580,958
Florists-4531	12,557,902	10,406,833	2,151,069
Office Supplies, Stationery, Gift Stores-4532	66,695,429	65,236,259	1,459,170
Office Supplies and Stationery Stores-45321	38,178,084	51,591,443	(13,413,359)
Gift, Novelty and Souvenir Stores-45322	28,517,346	13,644,817	14,872,529
Used Merchandise Stores-4533	15,072,753	2,780,192	12,292,561
Other Miscellaneous Store Retailers-4539	59,443,654	16,765,496	42,678,158
Non-Store Retailers-454	461,293,748	150,305,933	310,987,815
Foodservice and Drinking Places-722	637,759,029	595,246,945	42,512,084
Full-Service Restaurants-7221	289,544,570	225,746,532	63,798,038

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RMP Opportunity Gap - Retail Stores

Sprngfld 3,5,10-miles

Radius 2: MOUNTAIN AVE AT RICHLAND DR, SPRINGFIELD, NJ 07081, 0.00 - 5.00 Miles, Total

	2011 Demand (Consumer Expenditures)	2011 Supply (Retail Sales)	Opportunity Gap/Surplus
Limited-Service Eating Places-7222	267,664,976	245,567,315	22,097,661
Special Foodservices-7223	52,646,688	96,944,179	(44,297,491)
Drinking Places -Alcoholic Beverages-7224	27,902,796	26,988,920	913,876
GAFO *	1,610,218,594	1,591,485,389	18,733,205
General Merchandise Stores-452	806,681,463	453,739,728	352,941,735
Clothing and Clothing Accessories Stores-448	326,908,712	598,009,890	(271,101,178)
Furniture and Home Furnishings Stores-442	142,468,820	121,493,586	20,975,234
Electronics and Appliance Stores-443	140,285,732	202,268,121	(61,982,389)
Sporting Goods, Hobby, Book, Music Stores-451	127,178,437	150,737,804	(23,559,367)
Office Supplies, Stationery, Gift Stores-4532	66,695,429	65,236,259	1,459,170

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RMP Opportunity Gap - Retail Stores

Sprngfld 3,5,10-miles

Radius 3: MOUNTAIN AVE AT RICHLAND DR, SPRINGFIELD, NJ 07081, 0.00 - 10.00 Miles, Total

	2011 Demand (Consumer Expenditures)	2011 Supply (Retail Sales)	Opportunity Gap/Surplus
Total Retail Sales Incl Eating and Drinking Places	21,159,426,508	20,504,903,310	654,523,198
Motor Vehicle and Parts Dealers-441	3,481,334,083	4,018,889,184	(537,555,101)
Automotive Dealers-4411	3,125,215,571	3,773,924,707	(648,709,136)
Other Motor Vehicle Dealers-4412	103,397,428	49,241,881	54,155,547
Automotive Parts/Accsrs, Tire Stores-4413	252,721,085	195,722,596	56,998,489
Furniture and Home Furnishings Stores-442	461,447,343	408,060,374	53,386,969
Furniture Stores-4421	259,970,793	266,768,720	(6,797,927)
Home Furnishing Stores-4422	201,476,550	141,291,654	60,184,896
Electronics and Appliance Stores-443	481,629,860	494,395,685	(12,765,825)
Appliances, TVs, Electronics Stores-44311	351,853,194	391,646,410	(39,793,216)
Household Appliances Stores-443111	79,501,676	102,674,687	(23,173,011)
Radio, Television, Electronics Stores-443112	272,351,518	288,971,723	(16,620,205)
Computer and Software Stores-44312	107,029,914	94,252,651	12,777,263
Camera and Photographic Equipment Stores-44313	22,746,751	8,496,623	14,250,128
Building Material, Garden Equip Stores -444	1,898,082,093	1,427,928,803	470,153,290
Building Material and Supply Dealers-4441	1,732,450,007	1,393,531,204	338,918,803
Home Centers-44411	709,201,300	664,660,183	44,541,117
Paint and Wallpaper Stores-44412	41,724,036	26,333,334	15,390,702
Hardware Stores-44413	174,925,645	116,784,412	58,141,233
Other Building Materials Dealers-44419	806,599,026	585,753,275	220,845,751
Building Materials, Lumberyards-444191	309,919,097	229,029,551	80,889,546
Lawn, Garden Equipment, Supplies Stores-4442	165,632,086	34,397,598	131,234,488
Outdoor Power Equipment Stores-44421	13,906,135	5,265,645	8,640,490
Nursery and Garden Centers-44422	151,725,951	29,131,953	122,593,998
Food and Beverage Stores-445	2,828,012,087	4,236,552,002	(1,408,539,915)
Grocery Stores-4451	2,576,626,216	3,578,196,255	(1,001,570,039)
Supermarkets, Grocery (Ex Conv) Stores-44511	2,455,516,666	3,404,976,106	(949,459,440)
Convenience Stores-44512	121,109,550	173,220,150	(52,110,600)
Specialty Food Stores-4452	82,726,231	123,124,837	(40,398,606)
Beer, Wine and Liquor Stores-4453	168,659,639	535,230,910	(366,571,271)
Health and Personal Care Stores-446	1,134,151,684	1,538,638,345	(404,486,661)
Pharmacies and Drug Stores-44611	970,306,907	1,354,960,278	(384,653,371)
Cosmetics, Beauty Supplies, Perfume Stores-44612	40,045,798	60,589,890	(20,544,092)
Optical Goods Stores-44613	50,897,440	57,580,360	(6,682,920)
Other Health and Personal Care Stores-44619	72,901,539	65,507,817	7,393,722

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RMP Opportunity Gap - Retail Stores

Sprngfld 3,5,10-miles

Radius 3: MOUNTAIN AVE AT RICHLAND DR, SPRINGFIELD, NJ 07081, 0.00 - 10.00 Miles, Total

	2011 Demand (Consumer Expenditures)	2011 Supply (Retail Sales)	Opportunity Gap/Surplus
Gasoline Stations-447	1,880,736,786	1,143,435,217	737,301,569
Gasoline Stations With Conv Stores-44711	1,406,101,665	325,094,734	1,081,006,931
Other Gasoline Stations-44719	474,635,121	818,340,484	(343,705,363)
Clothing and Clothing Accessories Stores-448	1,169,364,415	1,791,612,906	(622,248,491)
Clothing Stores-4481	832,017,478	1,348,018,434	(516,000,956)
Men's Clothing Stores-44811	54,205,220	138,554,485	(84,349,265)
Women's Clothing Stores-44812	210,919,051	384,786,635	(173,867,584)
Childrens, Infants Clothing Stores-44813	46,428,374	135,374,371	(88,945,997)
Family Clothing Stores-44814	445,117,102	608,650,160	(163,533,058)
Clothing Accessories Stores-44815	20,355,486	17,204,937	3,150,549
Other Clothing Stores-44819	54,992,245	63,447,846	(8,455,601)
Shoe Stores-4482	157,142,398	225,862,068	(68,719,670)
Jewelry, Luggage, Leather Goods Stores-4483	180,204,539	217,732,403	(37,527,864)
Jewelry Stores-44831	168,048,066	197,698,718	(29,650,652)
Luggage and Leather Goods Stores-44832	12,156,473	20,033,685	(7,877,212)
Sporting Goods, Hobby, Book, Music Stores-451	428,950,669	454,399,241	(25,448,572)
Sportng Goods, Hobby, Musical Inst Stores-4511	299,860,935	299,108,168	752,767
Sporting Goods Stores-45111	157,214,901	113,636,924	43,577,977
Hobby, Toys and Games Stores-45112	94,937,693	131,933,196	(36,995,503)
Sew/Needlework/Piece Goods Stores-45113	18,806,024	21,311,953	(2,505,929)
Musical Instrument and Supplies Stores-45114	28,902,317	32,226,096	(3,323,779)
Book, Periodical and Music Stores-4512	129,089,734	155,291,073	(26,201,339)
Book Stores and News Dealers-45121	86,867,177	115,351,212	(28,484,035)
Book Stores-451211	82,495,156	82,425,823	69,333
News Dealers and Newsstands-451212	4,372,021	32,925,389	(28,553,368)
Prerecorded Tapes, CDs, Record Stores-45122	42,222,557	39,939,861	2,282,696
General Merchandise Stores-452	2,943,734,816	1,390,753,170	1,552,981,646
Department Stores Excl Leased Depts-4521	1,480,182,319	997,978,783	482,203,536
Other General Merchandise Stores-4529	1,463,552,497	392,774,386	1,070,778,111
Miscellaneous Store Retailers-453	534,132,305	277,143,916	256,988,389
Florists-4531	41,187,198	39,534,944	1,652,254
Office Supplies, Stationery, Gift Stores-4532	225,262,189	141,585,602	83,676,587
Office Supplies and Stationery Stores-45321	127,347,642	85,654,554	41,693,088
Gift, Novelty and Souvenir Stores-45322	97,914,547	55,931,048	41,983,499
Used Merchandise Stores-4533	52,085,027	11,796,324	40,288,703
Other Miscellaneous Store Retailers-4539	215,597,891	84,227,046	131,370,845
Non-Store Retailers-454	1,626,110,546	1,199,827,692	426,282,854
Foodservice and Drinking Places-722	2,291,739,820	2,123,266,776	168,473,044
Full-Service Restaurants-7221	1,036,195,238	872,135,279	164,059,959

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RMP Opportunity Gap - Retail Stores

Sprngfld 3,5,10-miles

Radius 3: MOUNTAIN AVE AT RICHLAND DR, SPRINGFIELD, NJ 07081, 0.00 - 10.00 Miles, Total

	2011 Demand (Consumer Expenditures)	2011 Supply (Retail Sales)	Opportunity Gap/Surplus
Limited-Service Eating Places-7222	966,667,255	738,729,883	227,937,372
Special Foodservices-7223	189,346,198	403,773,408	(214,427,210)
Drinking Places -Alcoholic Beverages-7224	99,531,129	108,628,208	(9,097,079)
GAFO *	5,710,389,293	4,680,806,977	1,029,582,316
General Merchandise Stores-452	2,943,734,816	1,390,753,170	1,552,981,646
Clothing and Clothing Accessories Stores-448	1,169,364,415	1,791,612,906	(622,248,491)
Furniture and Home Furnishings Stores-442	461,447,343	408,060,374	53,386,969
Electronics and Appliance Stores-443	481,629,860	494,395,685	(12,765,825)
Sporting Goods, Hobby, Book, Music Stores-451	428,950,669	454,399,241	(25,448,572)
Office Supplies, Stationery, Gift Stores-4532	225,262,189	141,585,602	83,676,587

* GAFO (General merchandise, Apparel, Furniture and Other) represents sales at stores that sell merchandise normally sold in department stores. This category is not included in Total Retail Sales Including Eating and Drinking Places.

Nielsen' RMP data is derived from two major sources of information. The demand data is derived from the Consumer Expenditure Survey (CE Survey), which is fielded by the U.S. Bureau of Labor Statistics (BLS). The supply data is derived from the Census of Retail Trade (CRT), which is made available by the U.S. Census.Additional data sources are incorporated to create both supply and demand estimates.

The difference between demand and supply represents the opportunity gap or surplus available for each retail outlet in the specified reporting geography. When the demand is greater than (less than) the supply, there is an opportunity gap (surplus) for that retail outlet. For example, a positive value signifies an opportunity gap, while a negative value signifies a surplus.

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Appendix: Area Listing

Area Name:

Type: Radius 1 Reporting Detail: Aggregate Reporting Level: Block Group

Radius Definition:

MOUNTAIN AVE AT RICHLAND DR
SPRINGFIELD, NJ 07081

Latitude/Longitude 40.699260 -74.322781
Radius 0.00 - 3.00

Area Name:

Type: Radius 2 Reporting Detail: Aggregate Reporting Level: Block Group

Radius Definition:

MOUNTAIN AVE AT RICHLAND DR
SPRINGFIELD, NJ 07081

Latitude/Longitude 40.699260 -74.322781
Radius 0.00 - 5.00

Area Name:

Type: Radius 3 Reporting Detail: Aggregate Reporting Level: Block Group

Radius Definition:

MOUNTAIN AVE AT RICHLAND DR
SPRINGFIELD, NJ 07081

Latitude/Longitude 40.699260 -74.322781
Radius 0.00 - 10.00

Project Information:

Site: 1

Order Number: 970855353

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Appendix E

Syndicated Data: Workplace & Employment Summary

Springfield

3-, 5-, 10-mile Radius

Business-Facts: WorkPlace and Employment Summary 2011

Springfield Township

Place (see appendix for geographies), Total

Business Description	Total Establishment	Total Employees	Employees Per Establishment
Industries (All)	1,181	12,294	10
Industries (Private Sector)	1,050	10,372	10
Industries (Government and Non-Profit)*	131	1,922	15
Agriculture (All)	16	106	7
Mining (All)	0	0	0
Construction (All)	59	268	5
Manufacturing (All)	67	1,013	15
Transportation, Communications/Public Utilities	36	216	6
Wholesale Trade (All)	52	1,039	20
Retail (All Retail)	218	3,177	15
Building Matls and Garden Supply	18	82	5
General Merchandise Stores	4	115	29
Food Stores	17	274	16
Auto Dealers and Gas Stations	20	765	38
Apparel and Accessory Stores	14	255	18
Home Furniture, Furnishings and Equipment	34	322	10
Eating and Drinking Places	41	696	17
Miscellaneous Retail Stores	70	668	10
Finance (All)	113	763	7
Bank, Savings and Lending Institutions	25	230	9
Security and Commodity Brokers	8	19	2
Insurance Carriers and Agencies	33	262	8
Real Estate	45	244	5
Trusts, Holdings and Other Investments	2	8	4

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Business-Facts: WorkPlace and Employment Summary 2011

Springfield Township

Place (see appendix for geographies), Total

Business Description	Total Establishment	Total Employees	Employees Per Establishment
Service (All)	588	5,485	9
Hotel and Other Lodging	4	100	25
Personal Services	77	460	6
Business Services	130	1,387	11
Motion Picture and Amusement	26	344	13
Health Services	149	970	7
Legal Services	62	368	6
Educational Services	22	655	30
Social Services	32	274	9
Misc, Membership Orgs and Nonclassified	86	927	11
Public Administration (All)	32	227	7

CY Population	15,430
CY Residential Pop per Business	13
CY Households	6,201
CY HHs per Businesses	5

Prepared from Claritas Business-Facts which includes data from infoUSA.

* Industries (Government & Non-Profit), or the Public Sector, includes Public Administration , Museums, Educational, and Social Services. All the rest of the Industries are the Private Sector.

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Business-Facts: WorkPlace and Employment Summary 2011

Springfield Township

Appendix: Area Listing

Area Name:

Type: List - Place Reporting Detail: Aggregate Reporting Level: Place

Geography Code	Geography Name	Geography Code	Geography Name
3470050	Springfield CDP		

Project Information:

Site: 3

Order Number: 970855353

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Business-Facts: WorkPlace and Employment Summary 2011

Sprngfld 3,5,10-miles

Radius 1: MOUNTAIN AVE AT RICHLAND DR, SPRINGFIELD, NJ 07081, 0.00 - 3.00 Miles, Total

Business Description	Total Establishment	Total Employees	Employees Per Establishment
Industries (All)	7,241	70,034	10
Industries (Private Sector)	6,530	58,621	9
Industries (Government and Non-Profit)*	711	11,413	16
Agriculture (All)	117	762	7
Mining (All)	5	20	4
Construction (All)	492	2,925	6
Manufacturing (All)	350	6,467	19
Transportation, Communications/Public Utilities	243	2,068	9
Wholesale Trade (All)	314	3,226	10
Retail (All Retail)	1,257	15,438	12
Building Matls and Garden Supply	74	933	13
General Merchandise Stores	33	1,589	48
Food Stores	88	1,373	16
Auto Dealers and Gas Stations	120	2,345	20
Apparel and Accessory Stores	119	857	7
Home Furniture, Furnishings and Equipment	185	2,471	13
Eating and Drinking Places	293	3,739	13
Miscellaneous Retail Stores	345	2,131	6
Finance (All)	675	4,912	7
Bank, Savings and Lending Institutions	135	1,353	10
Security and Commodity Brokers	119	480	4
Insurance Carriers and Agencies	117	719	6
Real Estate	285	2,194	8
Trusts, Holdings and Other Investments	19	166	9

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Business-Facts: WorkPlace and Employment Summary 2011

Sprngfld 3,5,10-miles

Radius 1: MOUNTAIN AVE AT RICHLAND DR, SPRINGFIELD, NJ 07081, 0.00 - 3.00 Miles, Total

Business Description	Total Establishment	Total Employees	Employees Per Establishment
Service (All)	3,629	32,082	9
Hotel and Other Lodging	20	377	19
Personal Services	564	2,988	5
Business Services	787	6,300	8
Motion Picture and Amusement	150	1,694	11
Health Services	989	8,943	9
Legal Services	297	1,668	6
Educational Services	159	5,049	32
Social Services	181	1,796	10
Misc, Membership Orgs and Nonclassified	482	3,267	7
Public Administration (All)	159	2,134	13

CY Population	103,294
CY Residential Pop per Business	14
CY Households	37,879
CY HHs per Businesses	5

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Business-Facts: WorkPlace and Employment Summary 2011

Sprngfld 3,5,10-miles

Radius 2: MOUNTAIN AVE AT RICHLAND DR, SPRINGFIELD, NJ 07081, 0.00 - 5.00 Miles, Total

Business Description	Total Establishment	Total Employees	Employees Per Establishment
Industries (All)	17,714	177,600	10
Industries (Private Sector)	15,872	146,741	9
Industries (Government and Non-Profit)*	1,842	30,859	17
Agriculture (All)	273	1,425	5
Mining (All)	14	66	5
Construction (All)	1,200	7,393	6
Manufacturing (All)	818	19,292	24
Transportation, Communications/Public Utilities	590	5,549	9
Wholesale Trade (All)	681	6,412	9
Retail (All Retail)	3,301	36,802	11
Building Matls and Garden Supply	179	2,132	12
General Merchandise Stores	82	3,925	48
Food Stores	328	5,103	16
Auto Dealers and Gas Stations	267	3,385	13
Apparel and Accessory Stores	335	2,707	8
Home Furniture, Furnishings and Equipment	371	3,782	10
Eating and Drinking Places	880	10,418	12
Miscellaneous Retail Stores	859	5,350	6
Finance (All)	1,635	14,057	9
Bank, Savings and Lending Institutions	367	3,692	10
Security and Commodity Brokers	267	1,910	7
Insurance Carriers and Agencies	283	2,994	11
Real Estate	679	5,066	8
Trusts, Holdings and Other Investments	39	395	10

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Business-Facts: WorkPlace and Employment Summary 2011

Sprngfld 3,5,10-miles

Radius 2: MOUNTAIN AVE AT RICHLAND DR, SPRINGFIELD, NJ 07081, 0.00 - 5.00 Miles, Total

Business Description	Total Establishment	Total Employees	Employees Per Establishment
Service (All)	8,831	81,452	9
Hotel and Other Lodging	37	1,016	28
Personal Services	1,579	6,698	4
Business Services	1,888	16,514	9
Motion Picture and Amusement	426	4,038	10
Health Services	2,161	21,909	10
Legal Services	679	3,745	6
Educational Services	401	14,059	35
Social Services	508	5,754	11
Misc, Membership Orgs and Nonclassified	1,152	7,719	7
Public Administration (All)	371	5,152	14

CY Population	343,929
CY Residential Pop per Business	19
CY Households	124,418
CY HHs per Businesses	7

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Business-Facts: WorkPlace and Employment Summary 2011

Sprngfld 3,5,10-miles

Radius 3: MOUNTAIN AVE AT RICHLAND DR, SPRINGFIELD, NJ 07081, 0.00 - 10.00 Miles, Total

Business Description	Total Establishment	Total Employees	Employees Per Establishment
Industries (All)	63,994	781,005	12
Industries (Private Sector)	56,133	614,812	11
Industries (Government and Non-Profit)*	7,861	166,193	21
Agriculture (All)	787	3,341	4
Mining (All)	32	222	7
Construction (All)	4,140	26,086	6
Manufacturing (All)	2,592	63,500	25
Transportation, Communications/Public Utilities	2,982	58,431	20
Wholesale Trade (All)	2,542	31,478	12
Retail (All Retail)	12,858	131,475	10
Building Matls and Garden Supply	587	6,719	11
General Merchandise Stores	390	12,399	32
Food Stores	1,537	17,273	11
Auto Dealers and Gas Stations	1,095	13,411	12
Apparel and Accessory Stores	1,259	10,298	8
Home Furniture, Furnishings and Equipment	1,249	13,257	11
Eating and Drinking Places	3,710	39,232	11
Miscellaneous Retail Stores	3,031	18,886	6
Finance (All)	5,538	70,289	13
Bank, Savings and Lending Institutions	1,332	14,044	11
Security and Commodity Brokers	721	6,798	9
Insurance Carriers and Agencies	999	30,085	30
Real Estate	2,371	17,637	7
Trusts, Holdings and Other Investments	115	1,725	15

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Business-Facts: WorkPlace and Employment Summary 2011

Sprngfld 3,5,10-miles

Radius 3: MOUNTAIN AVE AT RICHLAND DR, SPRINGFIELD, NJ 07081, 0.00 - 10.00 Miles, Total

Business Description	Total Establishment	Total Employees	Employees Per Establishment
Service (All)	30,679	346,000	11
Hotel and Other Lodging	157	7,039	45
Personal Services	6,002	26,142	4
Business Services	6,246	66,322	11
Motion Picture and Amusement	1,285	10,618	8
Health Services	6,526	96,525	15
Legal Services	2,311	16,374	7
Educational Services	1,545	65,648	43
Social Services	1,967	32,811	17
Misc, Membership Orgs and Nonclassified	4,640	24,521	5
Public Administration (All)	1,844	50,183	27

CY Population	1,464,143
CY Residential Pop per Business	23
CY Households	513,878
CY HHs per Businesses	8

Prepared from Claritas Business-Facts which includes data from infoUSA.

* Industries (Government & Non-Profit), or the Public Sector, includes Public Administration , Museums, Educational, and Social Services. All the rest of the Industries are the Private Sector.

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Appendix: Area Listing

Area Name:

Type: Radius 1 | Reporting Detail: Aggregate | Reporting Level: Block Group

Radius Definition:

MOUNTAIN AVE AT RICHLAND DR
SPRINGFIELD, NJ 07081

Latitude/Longitude 40.699260 -74.322781
Radius 0.00 - 3.00

Area Name:

Type: Radius 2 | Reporting Detail: Aggregate | Reporting Level: Block Group

Radius Definition:

MOUNTAIN AVE AT RICHLAND DR
SPRINGFIELD, NJ 07081

Latitude/Longitude 40.699260 -74.322781
Radius 0.00 - 5.00

Area Name:

Type: Radius 3 | Reporting Detail: Aggregate | Reporting Level: Block Group

Radius Definition:

MOUNTAIN AVE AT RICHLAND DR
SPRINGFIELD, NJ 07081

Latitude/Longitude 40.699260 -74.322781
Radius 0.00 - 10.00

Project Information:

Site: 1

Order Number: 970855353

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Appendix F

Foot Traffic Analysis

Morris Avenue

Morris Avenue at Center Street			Morris Avenue at Mountain Avenue			Morris Avenue BothLocations		
SATURDAY, 6/9/2012			**SATURDAY, 6/9/2012**			**SATURDAY, 6/9/2012**		
3:20:00 PM to 4:30 PM			3:20:00 PM to 4:30 PM			3:20:00 PM to 4:30 PM		
Total	141		Total	53		Total	194	
Avg. Time	0.02		Avg. Time	0.05		Avg. Time	0.03	
Entry			**Entry**			**Entry**		
Pedestrian	61	43.3%	Pedestrian	32	60.4%	Pedestrian	93	47.9%
Car	37	26.2%	Car	7	13.2%	Car	44	22.7%
Bus	6	4.3%	Bus	7	13.2%	Bus	13	6.7%
Store	37	26.2%	Store	7	13.2%	Store	44	22.7%
Unknown	0	0.0%	Unknown	0	0.0%	Unknown	0	0.0%
Type			**Type**			**Type**		
Browse	1	0.7%	Browse	1	1.9%	Browse	2	1.0%
Direct	133	94.3%	Direct	49	92.5%	Direct	182	93.8%
Loiter	3	2.1%	Loiter	3	5.7%	Loiter	6	3.1%
Uknown	4	2.8%	Uknown	0	0.0%	Uknown	4	2.1%
Exit			**Exit**			**Exit**		
Pedestrian	32	22.7%	Pedestrian	14	26.4%	Pedestrian	46	23.7%
Car	22	15.6%	Car	8	15.1%	Car	30	15.5%
Bus	17	12.1%	Bus	17	32.1%	Bus	34	17.5%
Store	67	47.5%	Store	13	24.5%	Store	80	41.2%
Unknown	3	2.1%	Unknown	1	1.9%	Unknown	4	2.1%
THURSDAY, 6/14/2012			**THURSDAY, 6/14/2012**			**THURSDAY, 6/14/2012**		
11:30 AM to 12:30 PM			11:30 AM to 12:30 PM			11:30 AM to 12:30 PM		
Total	146		Total	68		Total	214	
Avg. Time	0.04		Avg. Time	0.05		Avg. Time	0.05	
Entry			**Entry**			**Entry**		
Pedestrian	40	27.4%	Pedestrian	36	52.9%	Pedestrian	76	35.5%
Car	38	26.0%	Car	4	5.9%	Car	42	19.6%
Bus	2	1.4%	Bus	11	16.2%	Bus	13	6.1%
Store	65	44.5%	Store	17	25.0%	Store	82	38.3%
Unknown	1	0.7%	Unknown	0	0.0%	Unknown	1	0.5%
Type			**Type**			**Type**		
Browse	1	0.7%	Browse	1	1.5%	Browse	2	0.9%
Direct	115	78.8%	Direct	67	98.5%	Direct	182	85.0%
Loiter	9	6.2%	Loiter	0	0.0%	Loiter	9	4.2%
Uknown	21	14.4%	Uknown	0	0.0%	Uknown	21	9.8%
Exit			**Exit**			**Exit**		
Pedestrian	20	13.7%	Pedestrian	25	36.8%	Pedestrian	45	21.0%
Car	33	22.6%	Car	3	4.4%	Car	36	16.8%
Bus	13	8.9%	Bus	22	32.4%	Bus	35	16.4%
Store	67	45.9%	Store	18	26.5%	Store	85	39.7%
Unknown	13	8.9%	Unknown	0	0.0%	Unknown	13	6.1%

Morris Avenue at Center Street			Morris Avenue at Mountain Avenue			Morris Avenue BothLocations		
FRIDAY, 6/16/2012 3:00 PM to 4:00 PM			**FRIDAY, 6/16/2012** 3:00 PM to 4:00 PM			**FRIDAY, 6/16/2012** 3:00 PM to 4:00 PM		
Total	127		Total	62		Total	189	
Avg. Time	0.02		Avg. Time	0.05		Avg. Time	0.03	
Entry			**Entry**			**Entry**		
Pedestrian	52	40.9%	Pedestrian	40	64.5%	Pedestrian	92	48.7%
Car	25	19.7%	Car	0	0.0%	Car	25	13.2%
Bus	5	3.9%	Bus	22	35.5%	Bus	27	14.3%
Store	44	34.6%	Store	0	0.0%	Store	44	23.3%
Unknown	1	0.8%	Unknown	0	0.0%	Unknown	1	0.5%
Type			**Type**			**Type**		
Browse	1	0.8%	Browse	3	4.8%	Browse	4	2.1%
Direct	115	90.6%	Direct	57	91.9%	Direct	172	91.0%
Loiter	2	1.6%	Loiter	0	0.0%	Loiter	2	1.1%
Uknown	9	7.1%	Uknown	2	3.2%	Uknown	11	5.8%
Exit			**Exit**			**Exit**		
Pedestrian	22	17.3%	Pedestrian	32	51.6%	Pedestrian	54	28.6%
Car	34	26.8%	Car	0	0.0%	Car	34	18.0%
Bus	20	15.7%	Bus	29	46.8%	Bus	49	25.9%
Store	40	31.5%	Store	1	1.6%	Store	41	21.7%
Unknown	11	8.7%	Unknown	0	0.0%	Unknown	11	5.8%
AVERAGE			**AVERAGE**			**AVERAGE**		
Total	138		Total	61		Total	199	
Avg. Time	0.02		Avg. Time	0.05		Avg. Time	0.04	
Entry			**Entry**			**Entry**		
Pedestrian	51	37.0%	Pedestrian	36	59.0%	Pedestrian	87	43.7%
Car	33	24.2%	Car	4	6.0%	Car	37	18.6%
Bus	4	3.1%	Bus	13	21.9%	Bus	18	8.9%
Store	49	35.3%	Store	8	13.1%	Store	57	28.5%
Unknown	1	0.5%	Unknown	0	0.0%	Unknown	1	0.3%
Type			**Type**			**Type**		
Browse	1	0.7%	Browse	2	2.7%	Browse	3	1.3%
Direct	121	87.7%	Direct	58	94.5%	Direct	179	89.8%
Loiter	5	3.4%	Loiter	1	1.6%	Loiter	6	2.8%
Uknown	11	8.2%	Uknown	1	1.1%	Uknown	12	6.0%
Exit			**Exit**			**Exit**		
Pedestrian	25	17.9%	Pedestrian	24	38.8%	Pedestrian	48	24.3%
Car	30	21.5%	Car	4	6.0%	Car	33	16.8%
Bus	17	12.1%	Bus	23	37.2%	Bus	39	19.8%
Store	58	42.0%	Store	11	17.5%	Store	69	34.5%
Unknown	9	6.5%	Unknown	0	0.5%	Unknown	9	4.7%

Morris Avenue at Center Street			Morris Avenue at Mountain Avenue			Morris Avenue BothLocations		
TOTALS			**TOTALS**			**TOTALS**		
Total	414		Total	183		Total	597	
Entry			**Entry**			**Entry**		
Pedestrian	153	37.0%	Pedestrian	108	59.0%	Pedestrian	261	43.7%
Car	100	24.2%	Car	11	6.0%	Car	111	18.6%
Bus	13	3.1%	Bus	40	21.9%	Bus	53	8.9%
Store	146	35.3%	Store	24	13.1%	Store	170	28.5%
Unknown	2	0.5%	Unknown	0	0.0%	Unknown	2	0.3%
Type			**Type**			**Type**		
Browse	3	0.7%	Browse	5	2.7%	Browse	8	1.3%
Direct	363	87.7%	Direct	173	94.5%	Direct	536	89.8%
Loiter	14	3.4%	Loiter	3	1.6%	Loiter	17	2.8%
Uknown	34	8.2%	Uknown	2	1.1%	Uknown	36	6.0%
Exit			**Exit**			**Exit**		
Pedestrian	74	17.9%	Pedestrian	71	38.8%	Pedestrian	145	24.3%
Car	89	21.5%	Car	11	6.0%	Car	100	16.8%
Bus	50	12.1%	Bus	68	37.2%	Bus	118	19.8%
Store	174	42.0%	Store	32	17.5%	Store	206	34.5%
Unknown	27	6.5%	Unknown	1	0.5%	Unknown	28	4.7%

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