2015

# Village of Mamaroneck Downtown Retail Market Analysis

DRAFT

Village of Mamaroneck
Planning Department
4/13/2015

# Executive Summary

This market analysis of the Village of Mamaroneck Central Business District (CBD) examines the current retail climate, and identifies opportunities for expansion and recruitment efforts. This analysis will function as a resource guide for downtown economic development strategies. Key findings of this analysis include:

- The Village of Mamaroneck's 2013 population was 18,881 while the estimated trade area had a population of 141,532.
- Median household income for the trade area was $106,380. Median household income in the village was $89,484.
- The village has a diverse population. The largest minority population is of Hispanic origin.
- Primary Trade Area includes the village and a three mile wide buffer around the boundary. Destination attractions have larger trade area.
- Current retail vacancy rate is low at 5%. This number includes some retail spaces that are vacant but unavailable for lease.
- Many vacancies noted during the early stages of data collection have since been filled, signifying negligible gaps in occupancy.
- Retail leakage is minimal in the CBD, but there is room for improvement in several retail categories.
- Data indicates the CBD has a healthy mix of retail uses, which is reflected in the low vacancy rate.
- Pull factor analysis indicates the CBD has a strong draw from surrounding neighborhoods.
- Proactive targeting and recruitment strategy is necessary to maintain health of and competitiveness of CBD.
- Physical conditions of buildings, signage and facades are overall satisfactory, however there is room for enhancements.
- There are few national chains, which may minimize spillover effect.

# Introduction

The Village of Mamaroneck first incorporated in 1895 as a result of increased commercialization along the Mamaroneck River, at the boundary of the Town of Rye and the Town of Mamaroneck. Today, that same area serves as the central business district (CBD) for the village. It is a primary source of character within the village. It is a hub for cultural institutions, entertainment, shopping, and fine dining. The CBD is bound by Boston Post Road to the south, Metro North Railroad to the north, the Mamaroneck River to the east and Mt Pleasant Avenue to the west. The CBD is also wholly comprised of the C-2 zoning.. Mamaroneck Avenue is the main corridor in the CBD, running north to south. The purpose of this analysis is to identify unmet retail demand, assess the current state of retail activity, evaluate the strengths and weaknesses of the CBD, and postulate specific retail categories for targeted recruitment. A proactive marketing approach may then be applied to the CBD to foster growth in retail activities.

# Process

Data on the mix of uses within the district was collected to better understand the health of the downtown. Village planning inventoried retail uses, residential units, and office units within the CBD. Data captured includes parcel identification number, parcel owner, business name, business type, NAICS code (census standardization codes for businesses), address, a photograph of each business and whether or not the space was vacant.

The information collected was compiled into a database that was used to create multiple deliverables including a web mapping application or "story map" which takes the user on a tour through each property in the CBD. The use of applications like the "story map" display data in a more palpable way that allows for better understanding by the common user. The application is now posted on the internet for public access in support of a larger marketing campaign that promotes economic growth in the CBD and the rest of the Village.

Data collected was juxtaposed against data from nearby municipalities to ascertain how Mamaroneck's downtown retail mix compares to other municipalities. This aids in the identification of an appropriate retail mix that meets both the needs of the consumer and the merchant. A geographic information systems approach to demographics in the region was performed and lends itself to a better understanding of the consumer and where they are traveling from. Market power reports that identify retail leakages and surpluses for the trade area and the village were performed, and used in connection with the inventory and demographic profile.

A three dimensional GIS model of each commercial building within the C-2 zone was created. The model may be applied in a number of ways in the near future. For example, a three dimensional model is useful in assessing current and proposed zoning by creating hypothetical development scenarios using the language of the zoning code. Another potential use may be seen by "dropping" proposed developments into the model so they may be analyzed by the planning board as they appear in relation to the character and massing of adjacent properties and the CBD as a whole, thereby comparing conceptual designs in relation to existing conditions. A web accessible "scene" of the model, story map, and other economic development resources are available on the Village's Economic Development website: http://96.56.82.68:8081/economicdevelopment/

## Trade Area

In many downtown retail studies a consumer survey is performed to gather information on consumer wants and needs. These surveys help define a trade area, as they gather information on where consumers lives. At the time of this analysis a full customer survey was not possible, and alternative methods of defining trade area were used. Although consumer surveying was not completed it is implicit that the CBD trade area goes well beyond the village's municipal boundary. This is especially true when considering destination attractions which draw from the larger region. The CBD has multiple destination attractions including its mix of eclectic and traditional restaurants, the newly remodeled Mamaroneck Public Library, Emelin Theatre, and multiple street fair events throughout the year. The primary trade area (PTA) was determined as the area of the Village of Mamaroneck plus a three mile wide buffer from the village boundary using elements of Reilly's Law of Retail Gravitation (Figure1). Reilly's law makes considerations for the population of a community, its proximity to competing business districts, mix of businesses, traffic patterns, and destination attractions. A drive time analysis reveals that areas that are within ten minutes of the central business district have nearly the same boundary as the PTA, which further validates the defined trade area (Figure 2). Major competing retail centers within the PTA include the downtown areas of New Rochelle, Larchmont, Harrison, and Rye.

# Trade Area


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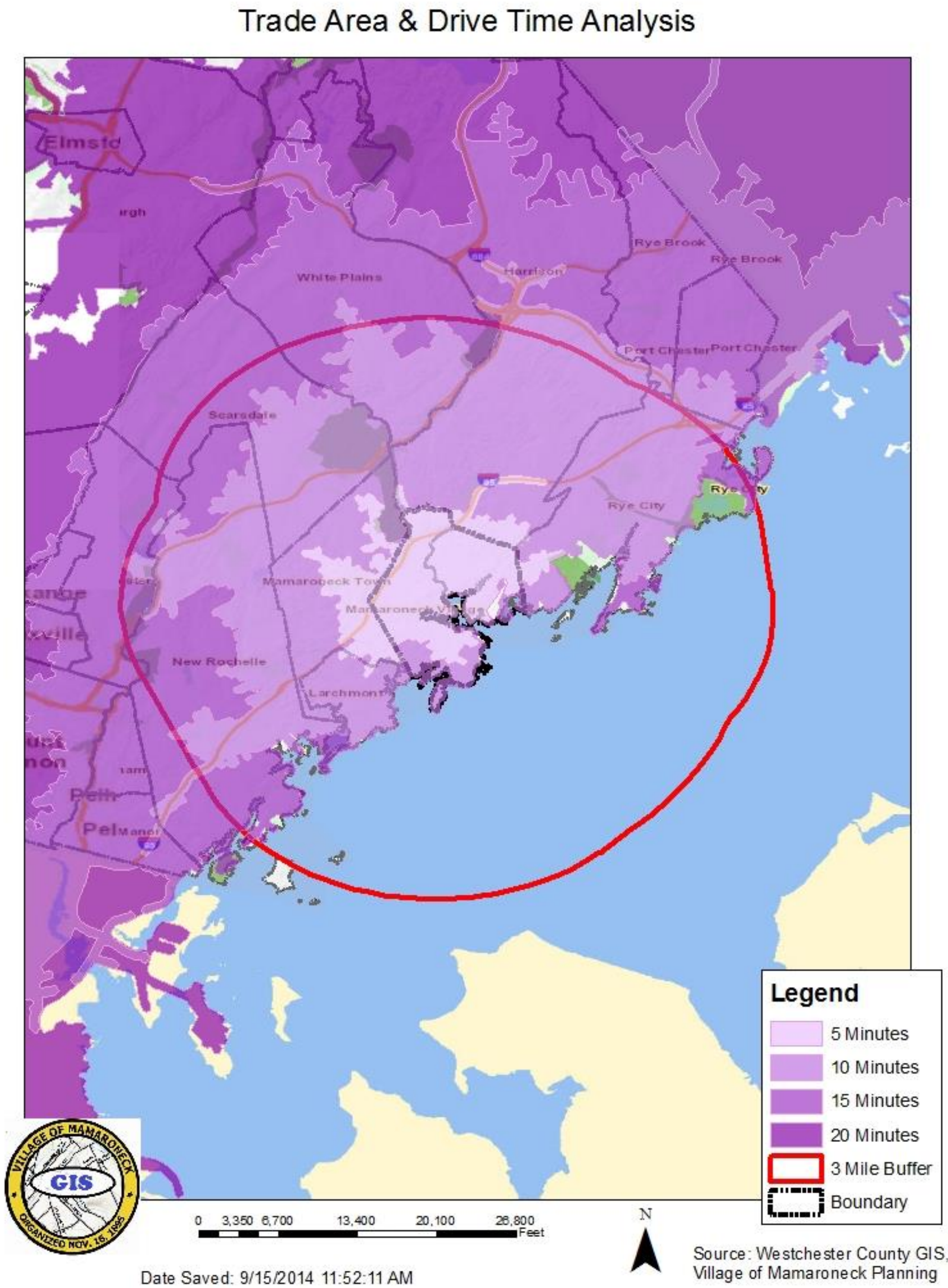
Source: Westchester County GIS, Village of Mamaroneck Planning

## Figure 1


Trade Area & Drive Time Analysis
Elmsfd
White Plains
Harrison
Rye Brook
Rye Brook
Port Chester
Port Chester
Scarsdale
Rye City
Rye City
Mamaroneck Town
Mamaroneck Village
New Rochelle
Larchmont
Legend
5 Minutes
10 Minutes
15 Minutes
20 Minutes
3 Mile Buffer
Boundary
VILLAGE OF MAMARONECK
GIS
ORGANIZED NOV. 18, 1895
0 3,350 6,700 13,400 20,100 26,800
Feet
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Source: Westchester County GIS,
Village of Mamaroneck Planning
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# Figure 2

## Strengths

- Multiple modes of transportation. Ease of access to train station, bus lines, and major highways and arterial roadways. About 13,000 cars travel Mamaroneck Avenue between Halstead and Boston Post Road.
- Proximity to Harbor Island Park which hosts a number of events with substantial spillover.
- Strong cultural recreational and institutional centers including the newly renovated Mamaroneck Library, Emelin Theater, and Harbor Island Park.
- Close proximity to New York City, a thirty five minute train ride from Grand Central Station.

**MAMARONECK LIBRARY & THE EMELIN THEATRE**

- Multiple parades, street fairs, and festivals in the CBD and the adjacent Harbor Island Park.
- Recent streetscape improvements have enhanced the aesthetics of the CBD.

## Weaknesses

- Limited retail selection aside from restaurants and food service establishments.
- Parking is inadequate on Mamaroneck Avenue. However according to a 2014 parking study, if the right parking policies and wayfinding are established, there will be sufficient parking to accommodate further growth without having to create new parking spaces.
- Few national franchises that may draw customers and create spillover to locally owned businesses.
- Few anchor stores, and little coordination between locations of anchors.
- More than 1/3 of the structures in the CBD were constructed before 1939. Many of these buildings may need renovations to improve interior and exterior aesthetics to attract new tenants.

## Demographic Profile

The population within the CBD was estimated to be 1,010 individuals. The population of the Village of Mamaroneck was 18,932 (2010 ACS 2008-2012 5 Year Estimates.) The median household income within the CBD was estimated to be $25,827/ Year. The estimated median household income for the entire village was $87,034. The estimated mean household income for the village was $130,231. Residence of the downtown district had the lowest income in the village at $24,827 in 2013 (ESRI reports 201.)

The economic demographics for the PTA compare favorably with those of Westchester County as a whole. The median household income for Westchester County is $81,093. The mean household income for Westchester County is $130,808. The median household income for households within the PTA is $106,380. The mean household income for PTA is $159,316. The median disposable income, or after tax income, in 2013 for the PTA was $76,004. Per capita income within the PTA in 2013 was $55,601 (ESRI Reports 2013.)

The Village of Mamaroneck is moderately diverse with a racial makeup of 76.8% White, 4.1% Black or African American, 4.9% Asian, and 10.9% some other race in 2010 (Census SF1.) The Hispanic makeup of the village was 24.3%, making Hispanics the largest minority group in the village. The Hispanic population is mostly concentrated in the Washingtonville and Industrial Area neighborhoods (Figure 6.)

The median age within the village is 40.9 years old. This is up from 38.1 in 2000. Near 67.3% of households are family households. The average household size was 2.65. The average family size is 3.23 (Census SF1.) The population pyramid indicates a large middle-aged population, and a large population of children under the age of 14. Young adults aged 18-29 are not well represented (Figure 3.) As evident in the change in median age, the population as a whole is aging, with less young adults either staying, or moving to Mamaroneck.

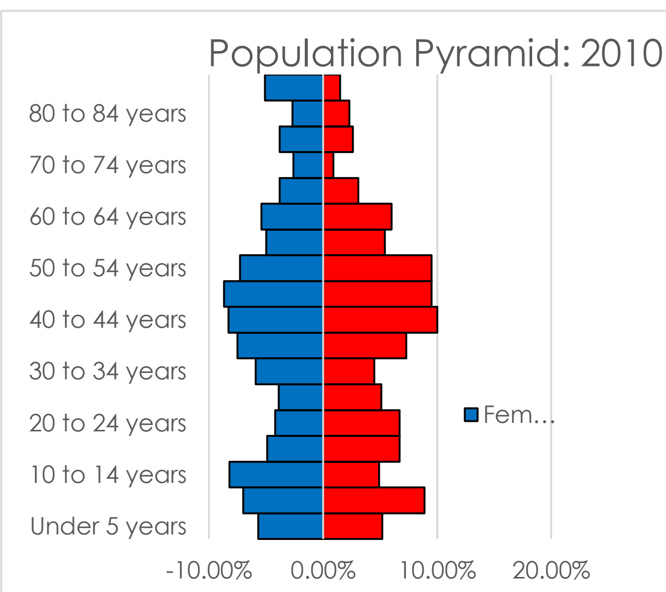
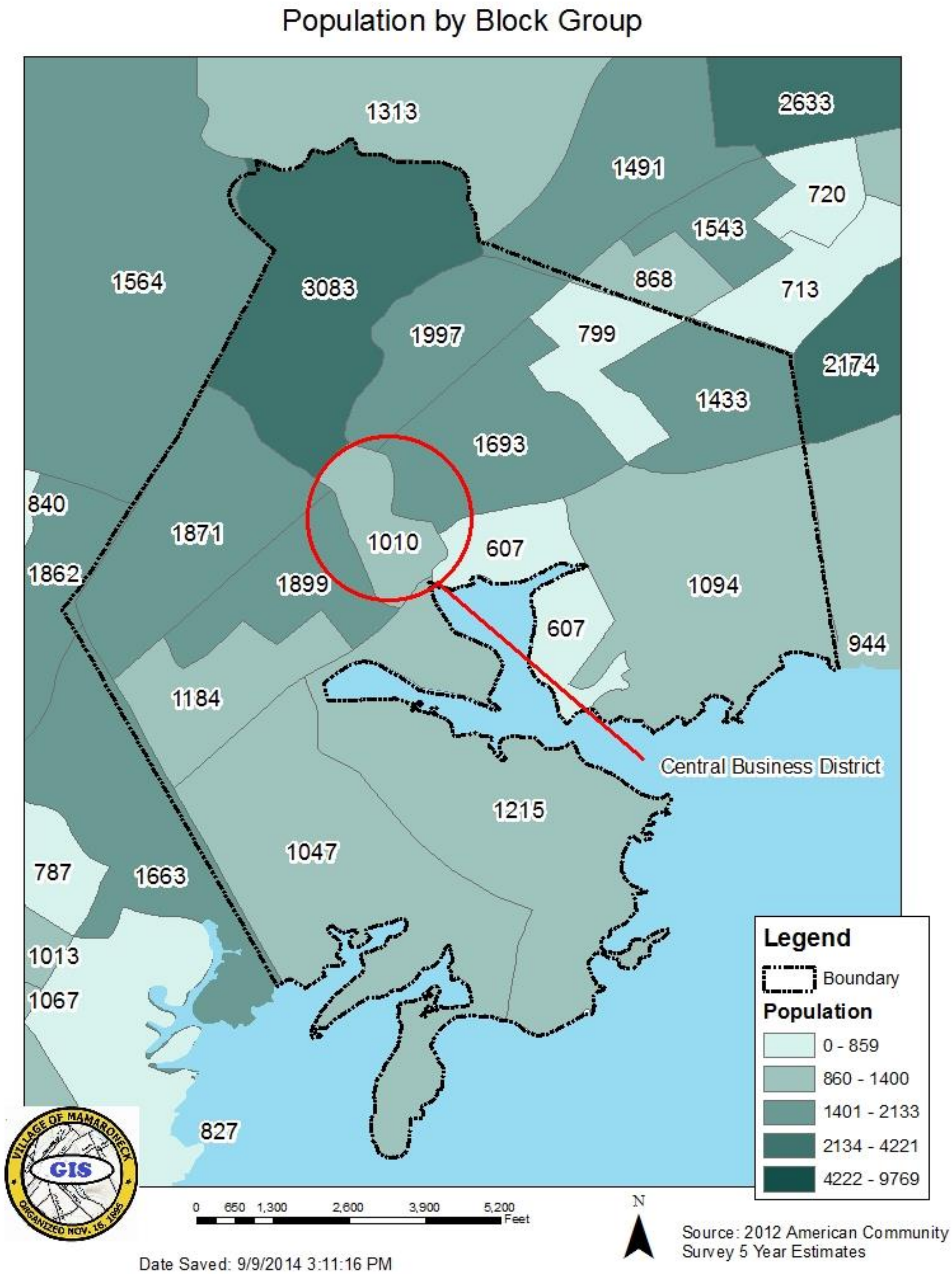



**Figure 3**

Source: 2008-2012 American Community Survey 5-Year Estimates.

Village residents are highly educated with 86.9% of residents completing high school or higher. Residents with bachelor's degrees or higher make up 49.3% of the population.


Population by Block Group
1313
2633
1491
720
1543
1564
3083
868
713
1997
799
2174
1433
1693
840
1871
1010
607
1862
1899
1094
607
944
1184
Central Business District
1215
1047
787
1663
1013
1067
827
Legend
Boundary
Population
0 - 859
860 - 1400
1401 - 2133
2134 - 4221
4222 - 9769
0 650 1,300 2,600 3,900 5,200
Feet
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Source: 2012 American Community Survey 5 Year Estimates
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**Figure 4**

Median Household Income

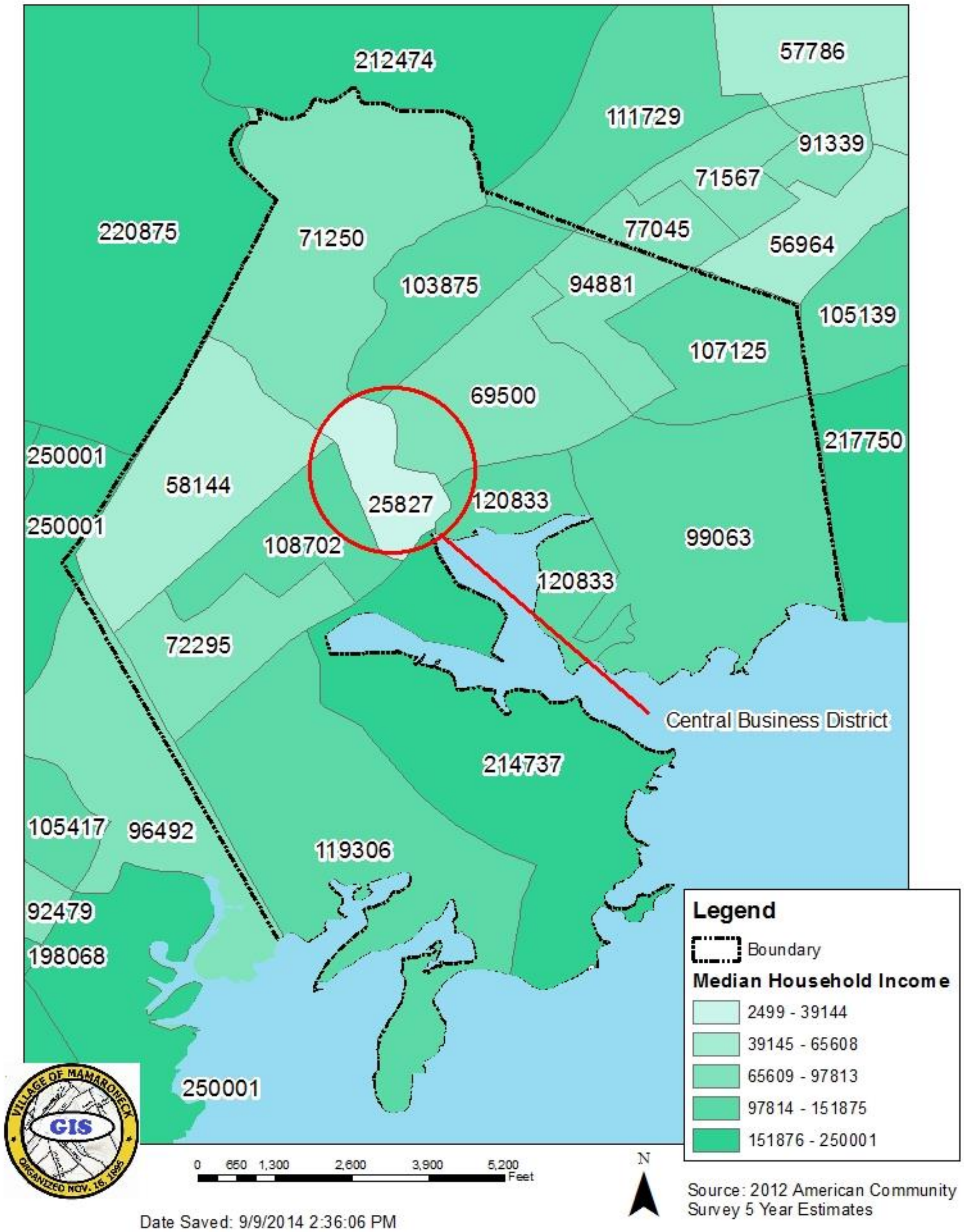
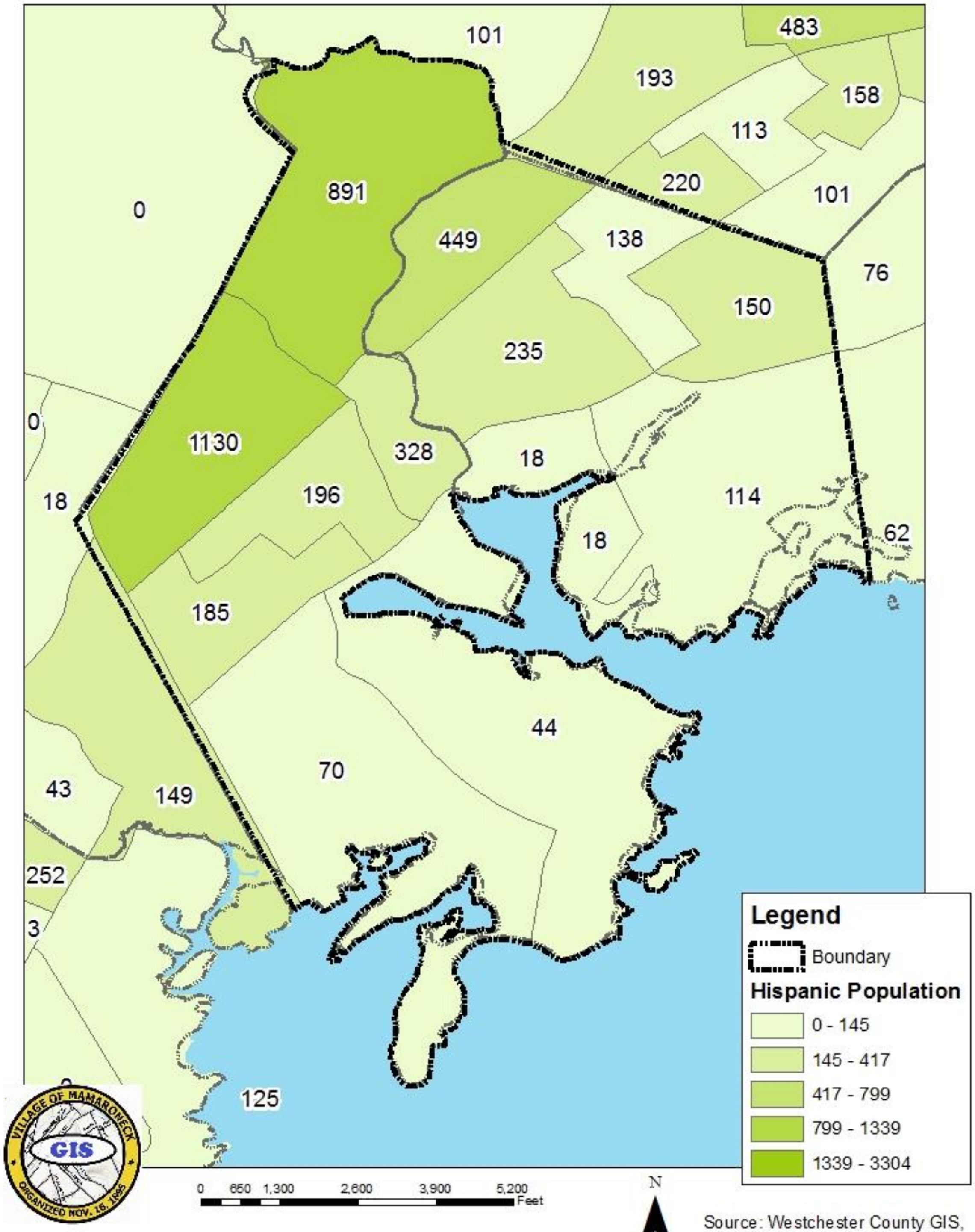



**Figure 5**

Hispanic Population by Block Group

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Source: Westchester County GIS, Census 2010.

**Figure 6**

## Demographic Significance

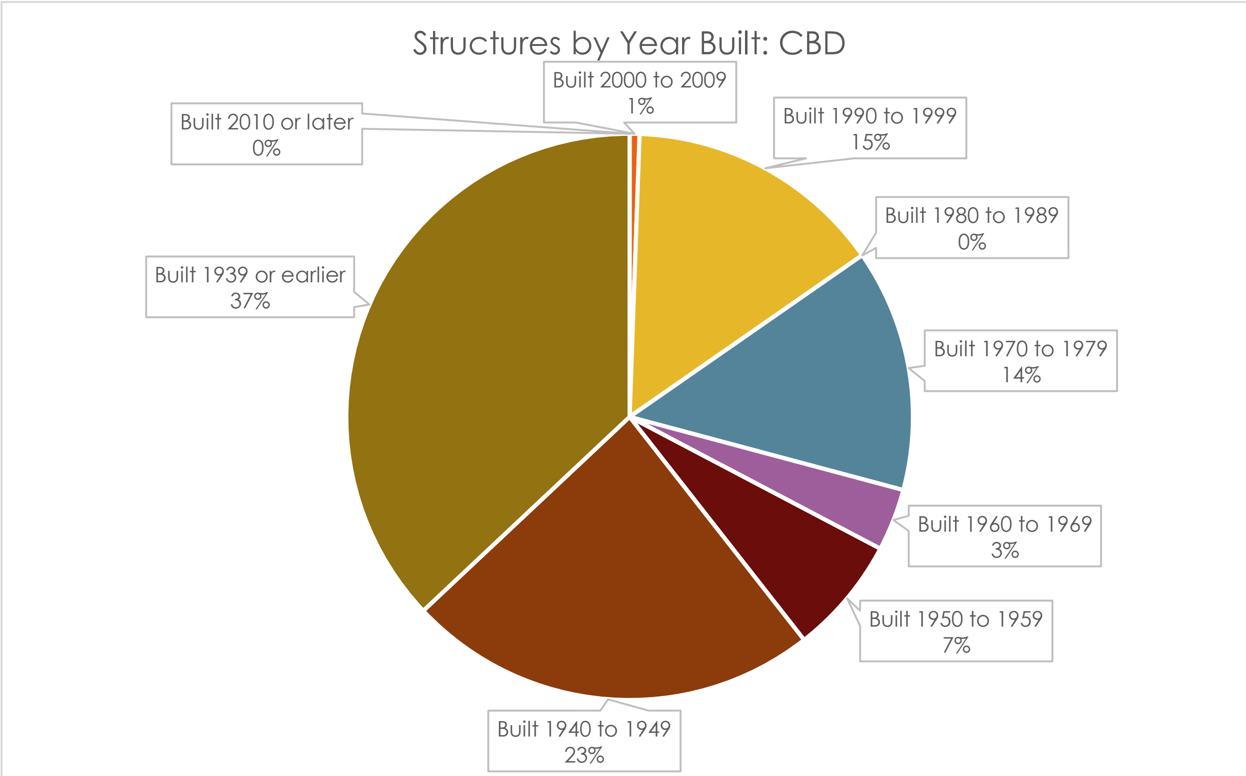
The demographic trends in the Village of Mamaroneck have the most significant impact on what retail categories will flourish best in the short and long terms. First and foremost population data helps quantify the size and future growth of the village's trade area. The current population projections project there will be steady growth in Mamaroneck, and businesses will have to accommodate these new customers. The socio-economic and ethnic makeup of these customers is equally important in determining what retail types will thrive. Education levels impact the socio-economic status of an area. For Example, highly educated populations tend to spend more on high-end products and services. More in-depth demographic reports are available on the Village's Economic Development Website.

## Building Conditions & Streetscapes

The general conditions within the CBD are more than adequate. The Village with Westchester County Planning, completed streetscape improvements in the late 90s. These improvements included new tree plantings and tree wells, update streetlamps, and improved sidewalk design. The downtown is sufficiently pedestrian oriented, with numerous crosswalks, and wide sidewalks. Street furniture has been installed. The introduction of sidewalk cafes in 1998 has had a dramatic effect on the vibrancy of the downtown. The cafes, open spring through fall, bring the street to life throughout the warmer months.

NEW CONSTRUCTION ON MAMARONECK AVENUE

The downtown area has a diverse mix of buildings. Many of the older buildings are either one or two stories with residential on the top floor. Many of the newer buildings, after 1983, incorporate increased residential uses, as a result of increased density allowances in the village's zoning code. With over 35% of buildings over 75 years old, many of the buildings may be in need of extensive maintenance or redevelopment, to maintain high aesthetic standards sought by retailers.




# Identification of Retail Categories

A retail analysis of three geographies was performed to identify retail categories that may be experiencing leakage. Retail leakage is the difference between supply and demand within a defined area. A negative retail leakage factor means that retail establishments are meeting customer demands, but it may also mean there is saturation. A positive leakage factor means there is unmet demand, and customers may be bringing their business to other areas. Negative values suggest less room for growth while positive values suggest opportunities to expand or grow business.

Reports were completed for the CBD, the village municipal area, and the PTA. The reports, completed using ESRI's Business Analyst, pull from business database listings provided by Dun & Bradstreet, in addition to demographic data sourced from ESRI forecasts and the U.S census. The data demonstrates that the CBD is healthy and is experiencing minimal leakage. Nearly all of the categories experiencing leakage within the CBD are atypical for downtown districts such as motor vehicle dealers, gasoline stations, and lawn and garden equipment stores. (Figure 7)

The data specify that the CBD has substantial retail pull from outside areas. The total leakage factor for the surrounding communities is considerably higher than the village's downtown. This shows that a number of consumers are traveling from outside areas to shop or dine in the CBD. (Figure 7)

Although the block group level data does not clearly indicate any starkly underrepresented retail categories, a closer look at the village-wide data and surrounding community data may be used to identify such categories. Within both the villlage and its surrounding communities there is a retail leakage seen in several categories including food and beverage stores; health and personal care stores; sporting good ,hobby, book, and music stores; general merchandise stores; food services and drinking places. Targeted marketing should be considered to attract businesses in these categories that are experiencing leakage.

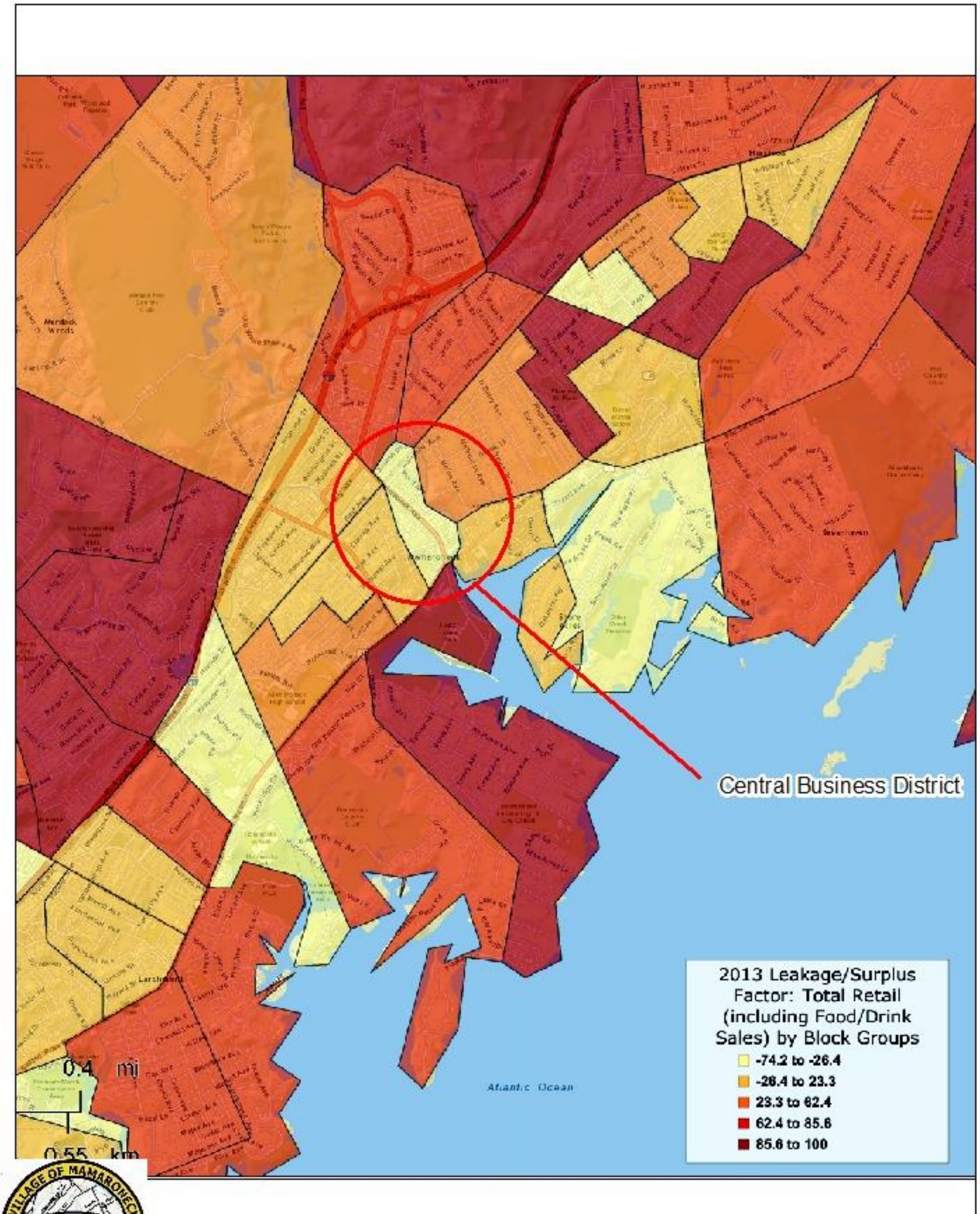

**AUTOMOTIVE REPAIR SHOP IN CENTRAL BUSINESS DISTRICT**

| Industry Group | CBD- Leakage Factor | Village-Leakage Factor | 3 Mile Buffer-Leakage Factor |
|---|---|---|---|
| **Motor Vehicle & Parts Dealers** | -56.1 | -41.1 | -8.9 |
| Automobile Dealers | -58.6 | -46 | -15.3 |
| Other Motor Vehicle Dealers | 100 | 40 | 66 |
| Auto Parts, Accessories & Tire Stores | -45.4 | 38.9 | 77.7 |
| **Furniture & Home Furnishings Stores** | -77.6 | 11.7 | 45.7 |
| Furniture Stores | -88.1 | -4.3 | 55.1 |
| Home Furnishings Stores | 100 | 32.6 | 37.8 |
| **Electronics & Appliance Stores** | -89.6 | -9 | 40.1 |
| **Bldg Materials, Garden Equip. & Supply Stores** | -46.4 | 48.5 | 64.5 |
| Bldg Material & Supplies Dealers | -51.5 | 49.3 | 70.4 |
| Lawn & Garden Equip & Supply Stores | 100 | 41.9 | 26.1 |
| **Food & Beverage Stores** | -80 | 47.8 | 31.8 |
| Grocery Stores | -22.6 | 70.9 | 37.5 |
| Specialty Food Stores | -88.1 | 3.7 | 8.1 |
| Beer, Wine & Liquor Stores | -97.7 | -30.6 | 2.4 |
| **Health & Personal Care Stores** | -86.2 | 0.7 | 1 |
| **Gasoline Stations** | 100 | 50.2 | 72.1 |
| **Clothing & Clothing Accessories Stores** | -75.6 | 55 | 43.5 |
| Clothing Stores | -61.9 | 74.2 | 46.7 |
| Shoe Stores | -86.3 | 53.3 | 52.1 |
| Jewelry, Luggage & Leather Goods Stores | -90.7 | -7.6 | 21.2 |
| **Sporting Goods, Hobby, Book & Music Stores** | -68.8 | 13.1 | 27.2 |
| Sporting Goods/Hobby/Musical Instr Stores | -19.7 | 11.9 | 33.5 |
| Book, Periodical & Music Stores | -93.7 | 22.1 | -3.6 |
| **General Merchandise Stores** | 57.9 | 95.6 | 95.8 |
| Department Stores Excluding Leased Depts. | 100 | 100 | 96.9 |
| Other General Merchandise Stores | 37 | 92.4 | 95 |
| **Miscellaneous Store Retailers** | -80.1 | 29 | 16.6 |
| Florists | -92.5 | -13 | 15.2 |
| Office Supplies, Stationery & Gift Stores | -81.8 | 35.8 | 6.4 |
| Used Merchandise Stores | 100 | 29.7 | 7 |
| Other Miscellaneous Store Retailers | -78.8 | 36.5 | 24.2 |
| **Nonstore Retailers** | 100 | 56.4 | -11.7 |
| Electronic Shopping & Mail-Order Houses | 100 | 94.1 | -15.6 |
| Vending Machine Operators | 100 | 62 | 49.3 |
| Direct Selling Establishments | 100 | -19.3 | 9.4 |
| **Food Services & Drinking Places** | -89.1 | 0.9 | 9.5 |
| Full-Service Restaurants | -91.3 | -11.5 | 10.2 |
| Limited-Service Eating Places | -78.3 | 23.9 | 7.4 |
| Special Food Services | -91.2 | 35.4 | 20.5 |
| Drinking Places - Alcoholic Beverages | -94.9 | -35.4 | -4.8 |

This is a measure of the relationship between supply and demand that ranges from +100 (total leakage) to -100 (total surplus).
**Leakage is indicated in red

# Figure 7

Total Leakage by Block Group




VILLAGE OF MAMARONECK GIS ORGANIZED NOV. 18, 1895

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Source: 2013 Esri Business Analyst Report

**Figure 8**

# Pull Factor Analysis

In addition to surplus/leakage analysis a pull factor analysis allows for benchmarking a trade area's "pull" in relation to competing market areas. A pull factor measures the ability of an area to attract consumers based on its population and statewide average expenditures. In the case of Mamaroneck countywide expenditures were used instead of statewide expenditures because of the smaller size and scale of the CBD, and the dissimilarity between the state retail market and the metropolitan new york retail market. The following example applies a pull factor to total retail sales in the CBD:

2013 Total Retail Sales in Westchester County= $11,963,281,899

2013 Total Population of Westchester County= 949,017

2013 Total retail Sales per Capita= $11,963,281,899 ÷ 949,017 = **$12,605**

2013 Total Retail Sales in CBD= $41,684,247

2013 Total Population in CBD= 1,004

2013 Total Retail Sales per Capita= $41,684,247 ÷ 1,004 = **$41,518**

Pull Factor for Total Retail Sales in Mamaroneck CBD= 41,518 ÷ 12,605 = **3.3**

A pull factor greater than 1 indicates the trade area is attracting outside of its own population base. A high pull factor for total retail sales in a central business district is to be expected. Assessing the pull factor of each retail category may shed light on which retail categories have strong pull and which categories do not.

There are a few retail categories that were found to have negative pull factors within the CBD. Categories that have negative pull factors and are appropriate for the CBD include grocery stores, sporting goods/hobby/musical instrument stores, department stores, and general merchandise stores. These stores may be experiencing negative pull values for a number of reasons including being underrepresented in the community, universal market decline, or lack of effective marketing.


BICYCLE & TOY SHOP

# Pull Factor by Retail Category

| Industry Group | County Total Sales | County Population | Per Capita | CBD Total Sales | CBD Population | Per Capita | Pull Factor |
|---|---|---|---|---|---|---|---|
| Motor Vehicle & Parts Dealers | $1,953,210,940 | 949,017 | 2058.14115 | $3,311,532 | 1004 | 3298.338645 | 1.602581361 |
| Automobile Dealers | $1,865,269,115 | 949,017 | 1965.474923 | $3,113,609 | 1004 | 3101.204183 | 1.577839609 |
| Other Motor Vehicle Dealers | $38,410,471 | 949,017 | 40.47395463 | $0 | 1004 | 0 | 0 |
| Auto Parts, Accessories & Tire Stores | $49,531,354 | 949,017 | 52.19227264 | $197,923 | 1004 | 197.1344622 | 3.777081399 |
| Furniture & Home Furnishings Stores | $231,860,495 | 949,017 | 244.3164822 | $1,098,416 | 1004 | 1094.039841 | 4.477961662 |
| Furniture Stores | $74,105,197 | 949,017 | 78.08626927 | $1,098,416 | 1004 | 1094.039841 | 14.01065579 |
| Home Furnishings Stores | $157,755,298 | 949,017 | 166.2302129 | $0 | 1004 | 0 | 0 |
| Electronics & Appliance Stores | $271,635,839 | 949,017 | 286.2286334 | $3,449,881 | 1004 | 3436.136454 | 12.00486623 |
| Bldg Materials, Garden Equip. & Supply Stores | $229,389,634 | 949,017 | 241.7128819 | $359,776 | 1004 | 358.3426295 | 1.482513579 |
| Bldg Material & Supplies Dealers | $195,687,433 | 949,017 | 206.2001345 | $359,776 | 1004 | 358.3426295 | 1.737838971 |
| Lawn & Garden Equip & Supply Stores | $33,702,201 | 949,017 | 35.5127474 | $0 | 1004 | 0 | 0 |
| Food & Beverage Stores | $1,912,811,042 | 949,017 | 2015.570893 | $10,222,663 | 1004 | 10181.93526 | 5.05163837 |
| Grocery Stores | $1,577,455,317 | 949,017 | 1662.19922 | $1,567,915 | 1004 | 1561.668327 | 0.939519348 <-- |
| Specialty Food Stores | $96,308,238 | 949,017 | 101.4820999 | $875,125 | 1004 | 871.6384462 | 8.589085633 |
| Beer, Wine & Liquor Stores | $239,047,487 | 949,017 | 251.8895731 | $7,779,623 | 1004 | 7748.628486 | 30.76200571 |
| Health & Personal Care Stores | $1,357,217,924 | 949,017 | 1430.130255 | $6,051,216 | 1004 | 6027.10757 | 4.214376662 |
| Gasoline Stations | $455,176,764 | 949,017 | 479.6297263 | $0 | 1004 | 0 | 0 |
| Clothing & Clothing Accessories Stores | $1,009,496,661 | 949,017 | 1063.728744 | $3,432,792 | 1004 | 3419.115538 | 3.214273901 |
| Clothing Stores | $729,729,467 | 949,017 | 768.9319232 | $1,541,751 | 1004 | 1535.608566 | 1.997066996 |
| Shoe Stores | $110,257,307 | 949,017 | 116.1805394 | $901,928 | 1004 | 898.3346614 | 7.732230076 |
| Jewelry, Luggage & Leather Goods Stores | $169,509,887 | 949,017 | 178.6162808 | $989,113 | 1004 | 985.1723108 | 5.515579577 |
| Sporting Goods, Hobby, Book & Music Stores | $328,112,062 | 949,017 | 345.7388666 | $737,776 | 1004 | 734.8366534 | 2.125409447 |
| Sporting Goods/Hobby/Musical Instr Stores | $265,894,229 | 949,017 | 280.1785732 | $175,790 | 1004 | 175.0896414 | 0.624921597 <-- |
| Book, Periodical & Music Stores | $62,217,833 | 949,017 | 65.56029344 | $561,986 | 1004 | 559.747012 | 8.537896684 |
| General Merchandise Stores | $1,482,484,474 | 949,017 | 1562.126362 | $179,609 | 1004 | 178.8934263 | 0.114519178 <-- |
| Department Stores Excluding Leased Depts. | $667,008,711 | 949,017 | 702.8416888 | $0 | 1004 | 0 | 0 |
| Other General Merchandise Stores | $815,475,763 | 949,017 | 859.2846735 | $179,609 | 1004 | 178.8934263 | 0.208188778 <-- |
| Miscellaneous Store Retailers | $457,834,720 | 949,017 | 482.4304728 | $1,429,755 | 1004 | 1424.058765 | 2.951842484 |
| Florists | $25,314,658 | 949,017 | 26.67460962 | $298,520 | 1004 | 297.3306773 | 11.14658027 |
| Office Supplies, Stationery & Gift Stores | $117,014,270 | 949,017 | 123.3004994 | $372,895 | 1004 | 371.4093625 | 3.012229184 |
| Used Merchandise Stores | $39,849,526 | 949,017 | 41.9903184 | $0 | 1004 | 0 | 0 |
| Other Miscellaneous Store Retailers | $275,656,266 | 949,017 | 290.4650454 | $758,340 | 1004 | 755.3187251 | 2.60037735 |
| Nonstore Retailers | $1,093,443,369 | 949,017 | 1152.185229 | $0 | 1004 | 0 | 0 |
| Electronic Shopping & Mail-Order Houses | $803,458,798 | 949,017 | 846.6221343 | $0 | 1004 | 0 | 0 |
| Vending Machine Operators | $20,982,690 | 949,017 | 22.10992005 | $0 | 1004 | 0 | 0 |
| Direct Selling Establishments | $269,001,881 | 949,017 | 283.4531742 | $0 | 1004 | 0 | 0 |
| Food Services & Drinking Places | $1,180,607,975 | 949,017 | 1244.032483 | $11,410,831 | 1004 | 11365.36952 | 9.135910578 |
| Full-Service Restaurants | $637,631,025 | 949,017 | 671.8857776 | $7,409,529 | 1004 | 7380.008964 | 10.98402319 |
| Limited-Service Eating Places | $382,453,288 | 949,017 | 402.9994068 | $1,976,659 | 1004 | 1968.783865 | 4.885326955 |
| Special Food Services | $105,442,166 | 949,017 | 111.1067199 | $1,147,653 | 1004 | 1143.080677 | 10.28813269 |
| Drinking Places - Alcoholic Beverages | $55,081,496 | 949,017 | 58.04057883 | $876,990 | 1004 | 873.4960159 | 15.04974681 |

High Pull Factor
Medium Pull Factor
Negative Pull Factor

**Figure 9**

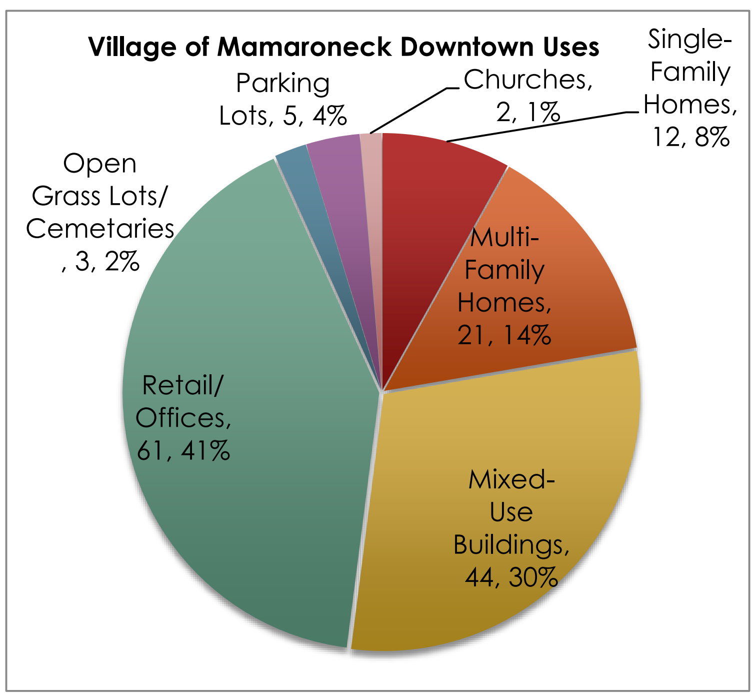
# Retail Mix and Inventory

Assessing retail mix is essential in the determination of growth opportunities. Heavy saturation of one type of retail category may take away from a downtown's vibrancy. Having a strong variety of retail categories assures the downtown attracts people for different reasons. This is essential as a customer may come for a specific retail destination, but may end up shopping in multiple stores.

Every community is unique, and not every retail mix is well suited for every community. To compare and contrast the retail mix of another municipality a number of considerations must be made. The communities chosen should have similar characteristics. They should have similar populations, demographics, and should be at a comparable distance from New York City. This is limiting in the case of Mamaroneck given the lack of available data.

The City of Peekskill recently performed a retail study including an inventory of stores in their downtown. Their data was collected in 2012 and is the most accurate and comparable available. Peekskill has notable demogaphic differences with respect to income and racial/ethnic diversity. However, Peekskill is similarly sized to the village of Mamaroneck with a total population of 23,000 residents. The trade area identified in the Peekskill study has roughly the same population as the village's trade area. Although there are differences between the two communities a comparison of retail mix is still worthwhile considering the similarities between the two communities and the ease of access to authoritative data.

The Village of Mamaroneck's CBD has a lower vacancy rate at just 5%, compared to Peekskill's 35%. The largest variation in percentage is seen in the restaurants/fast food category, with Mamaroneck's restaurants taking up 28% of the market, while Peekskill's restaurants take up 20%. Among other retail categories there is no variation greater than 4%. Some categories are missing altogether. Categories present in Peekskill but not in Mamaroneck are grocery stores, art gallerys, locksmiths, discount stores, and thrift stores. Categories not present in Peekskill are pet stores, shipping stores, shoe stores(although shoes are likely sold within general apparel stores), and tobacco stores.

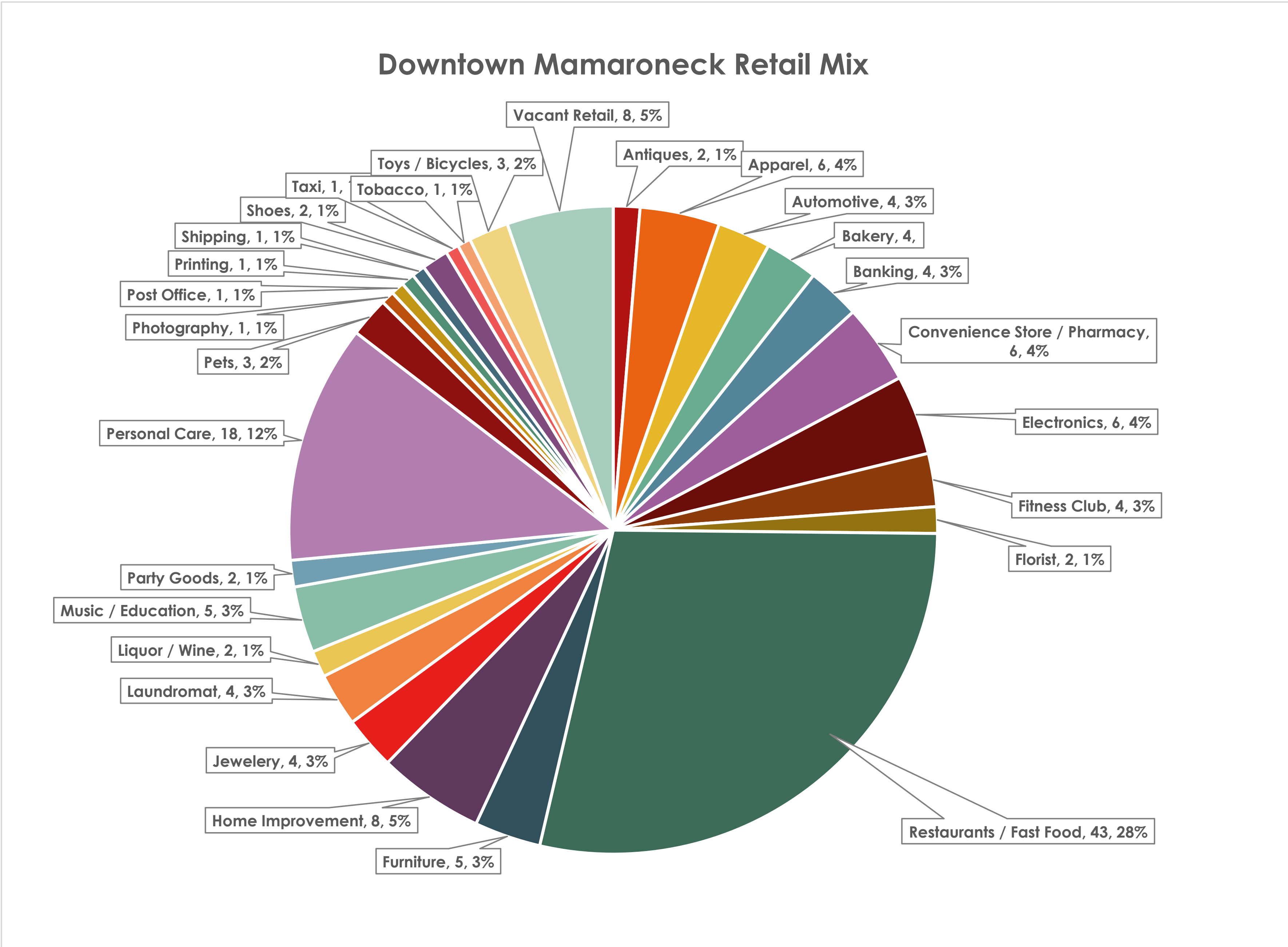


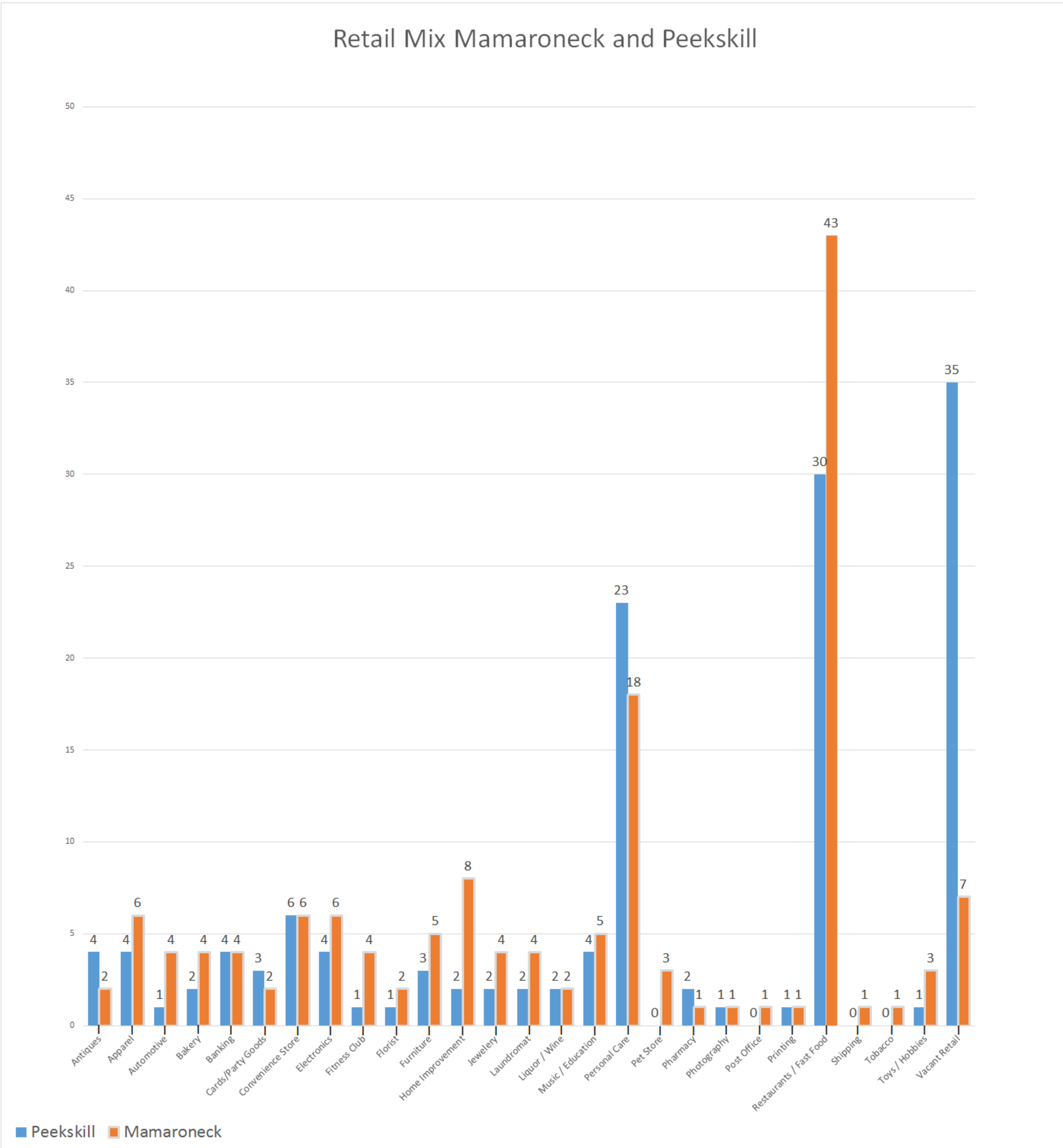
Due to the difference in demographics some of the unrepresented retail categories may not thrive in Mamaroneck. Dollar stores and thrift stores typically target lower income areas. A small scale grocery store of 5,000 to 10,000 square feet may be supported in the downtown. A grocery store would fit in with the vision of the adjacent TOD area and support mixed-use and less reliance on personal automobiles.

**LEGUME MARKET**

Currently the only grocery store over 5,000 square feet is Legume Market, a gourmet specialty market, located at 1 Depot Plaza. The addition of a grocery store in this area will bolster health in the community and protect the area from becoming a food desert.

Art galleries may also be a viable option in the downtown. Mamaroneck should seek to capitalize on the growing “creative class”. Art galleries and culture help improve a communities appeal by creating a sense of place. Arts and cultural activities draw visitors from outside communities which help enhance economic and social capital. Other municipalities, such as Peekskill in Northern Westchester and Beacon in Dutchess County have implemented incubator and live-work programs to help attract artists to their communities. Arts and cultural activities appeal to young professionals and artists, both of which are currently underrepresented in Mamaroneck, and many other southern Westchester municipalities. Additionally, coffeeshops also attract members of the so called “creative class”. Coffeeshops are often utilized as public spaces that allow customers to work, socialize, and relax. Since coffeeshops cast a large net of uses, they tend to attract a broad range of customers, which could lead to increased spillover.


Downtown Mamaroneck Retail Mix
Vacant Retail, 8, 5%
Antiques, 2, 1%
Apparel, 6, 4%
Automotive, 4, 3%
Bakery, 4,
Banking, 4, 3%
Convenience Store / Pharmacy, 6, 4%
Electronics, 6, 4%
Fitness Club, 4, 3%
Florist, 2, 1%
Restaurants / Fast Food, 43, 28%
Furniture, 5, 3%
Home Improvement, 8, 5%
Jewelery, 4, 3%
Laundromat, 4, 3%
Liquor / Wine, 2, 1%
Music / Education, 5, 3%
Party Goods, 2, 1%
Personal Care, 18, 12%
Pets, 3, 2%
Photography, 1, 1%
Post Office, 1, 1%
Printing, 1, 1%
Shipping, 1, 1%
Shoes, 2, 1%
Taxi, 1,
Tobacco, 1, 1%
Toys / Bicycles, 3, 2%


Retail Mix Mamaroneck and Peekskill
0
5
10
15
20
25
30
35
40
45
50
Antiques
Apparel
Automotive
Bakery
Banking
Cards/Party Goods
Convenience Store
Electronics
Fitness Club
Florist
Furniture
Home Improvement
Jewelery
Laundromat
Liquor / Wine
Music / Education
Personal Care
Pet Store
Pharmacy
Photography
Post Office
Printing
Restaurants / Fast Food
Shipping
Tobacco
Toys / Hobbies
Vacant Retail
Peekskill
Mamaroneck

| | Mamaroneck | | Peekskill | | |
|---|---|---|---|---|---|
| Use | Stores | Percentage | Stores | Percentage | Difference |
| Antiques | 2 | 1 | 4 | 3 | -1 |
| Apparel | 6 | 4 | 4 | 3 | 1 |
| Automotive | 4 | 3 | 1 | 1 | 2 |
| Bakery | 4 | 3 | 2 | 1 | 1 |
| Banking | 4 | 3 | 4 | 3 | 0 |
| Cards/Party Goods | 2 | 1 | 3 | 2 | -1 |
| Convenience Store | 6 | 4 | 6 | 4 | 0 |
| Electronics | 6 | 4 | 4 | 3 | 1 |
| Fitness Club | 4 | 3 | 1 | 1 | 2 |
| Florist | 2 | 1 | 1 | 1 | 1 |
| Furniture | 5 | 3 | 3 | 2 | 1 |
| Home Improvement | 8 | 5 | 2 | 1 | 4 |
| Jewelery | 4 | 3 | 2 | 1 | 1 |
| Laundromat | 4 | 3 | 2 | 1 | 1 |
| Liquor / Wine | 2 | 1 | 2 | 1 | 0 |
| Music / Education | 5 | 3 | 4 | 3 | 1 |
| Personal Care | 18 | 12 | 23 | 16 | -4 |
| Pets | 3 | 2 | 0 | 0 | 2 |
| Pharmacy | 1 | 1 | 2 | 1 | -1 |
| Photography | 1 | 1 | 1 | 1 | 0 |
| Printing | 1 | 1 | 1 | 1 | 0 |
| Restaurants / Fast Food | 43 | 28 | 30 | 20 | 8 |
| Shipping | 1 | 1 | 0 | 0 | 1 |
| Shoes | 2 | 1 | 0 | 0 | 1 |
| Tobacco | 1 | 1 | 0 | 0 | 1 |
| Toys / Hobbies | 3 | 2 | 1 | 1 | 1 |
| Vacant Retail | 7 | 5 | 35 | 24 | -19 |
| Grocery Store | 0 | 0 | 2 | 1 | -1 |
| Art Gallery and Studio | 0 | 0 | 4 | 3 | -3 |
| Locksmith | 0 | 0 | 1 | 1 | -1 |
| Discount Merchandise (Dollar Store) | 0 | 0 | 2 | 1 | -1 |
| Thrift Store | 0 | 0 | 1 | 1 | -1 |
| | 149 | | 148 | | 0 |

# Conclusions

The Village of Mamaroneck downtown is currently healthy. It has a competitive mix of retail types that attracts local customers as well as customers from surrounding muncipalities. Only a handful of retail types may be underrespresented in the community. A proactive targeting and recruitment approach will ensure the downtown's continued growth. Based on information conducted in this analysis retail types that should be targeted for recruitment or marketing are:

- **Food and Beverage Stores: Including a Small Grocery Store with Fresh Food**
- **Health and Personal Care Stores**
- **Sporting Goods ,Hobby, Book, and Music Stores**
- **General Merchandise Stores**
- **Food Services and Drinking places**
- **Art Galleries**
- **Coffeeshops**

In addition to targeted recruitment and marketing, the Village should continue hosting streetfairs and other placemaking events. The Village should also continue to uphold its reputation as a restaurant center, but capatilize on other retail uses that bring in business at different times of the day, keeping the street alive, and filled with pedestrians througout the day. Given the large percentage of older buildings, the village should consider working with property owners in the area to apply for main street grants aimed at improving the aesthetics of the CBD. The way the street feels and looks when people come to Mamaroneck will determine whether or not they will come and visit again, a street that is teaming with activity will leave a positive impression on customers and will ultimately benefit the many businesses in downtown Mamaroneck.

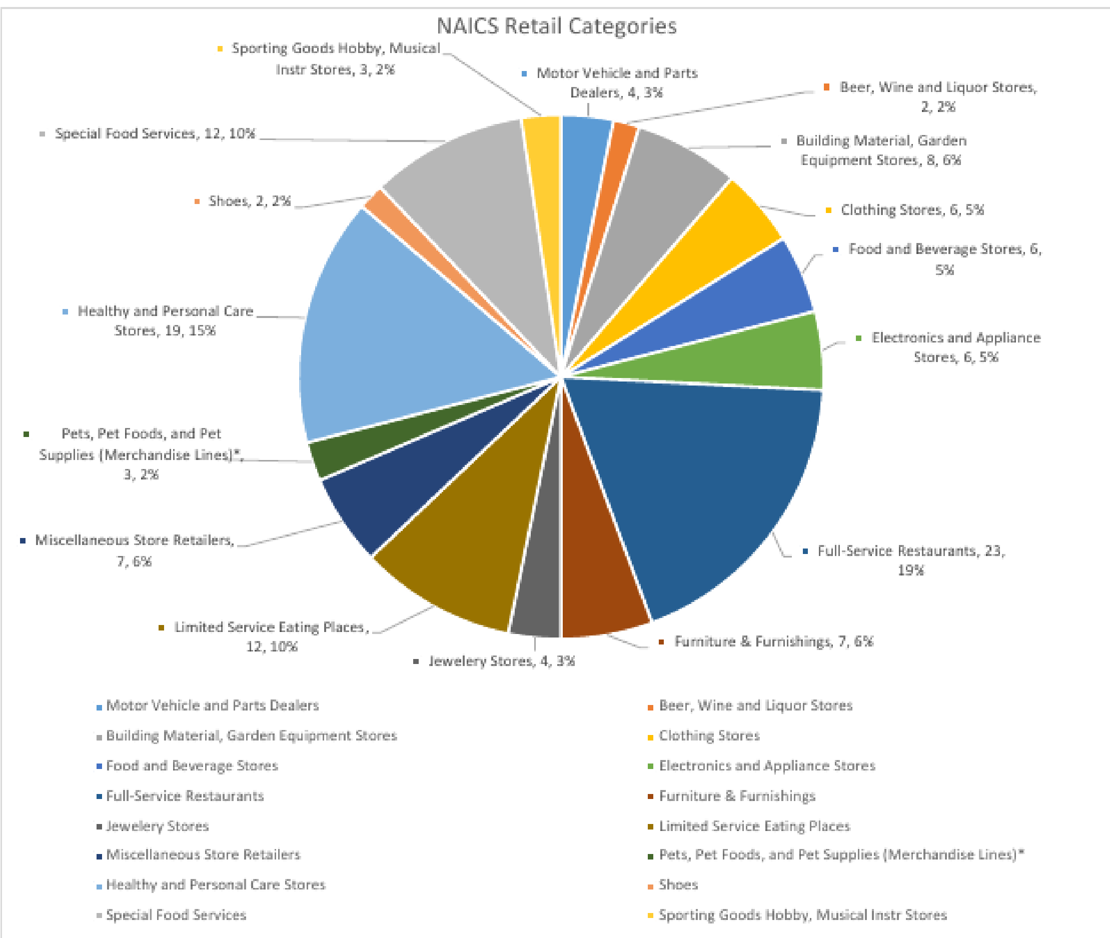
# Appendix

| NAICS CATEGORY | # | % | 2013 Demand | 2013 Supply | Opp Gap/ Surplus | Factor |
|---|---|---|---|---|---|---|
| Motor Vehicle and Parts Dealers | 4 | 3 | 929948 | 3311532 | -2381584 | -56.1 |
| Beer, Wine and Liquor Stores | 2 | 2 | 89663 | 7779623 | -7689960 | -97.7 |
| Building Material, Garden Equipment Stores | 8 | 8 | 131841 | 359776 | -227935 | -46.4 |
| Clothing Stores | 6 | 6 | 476862 | 3432792 | -2955930 | -75.6 |
| Food and Beverage Stores | 6 | 6 | 1133957 | 10222663 | -9088706 | -80 |
| Electronics and Appliance Stores | 6 | 6 | 188894 | 3449881 | -3260987 | -89.6 |
| Full-Service Restaurants | 23 | 22 | 338091 | 7409529 | -7071438 | -91.3 |
| Furniture & Furnishings | 7 | 7 | 138856 | 1098416 | -959560 | -77.6 |
| Jewelery Stores | 4 | 4 | 48069 | 989113 | -941044 | -90.7 |
| Limited Service Eating Places | 12 | 11 | 240836 | 1976659 | -1735823 | -78.3 |
| Miscellaneous Store Retailers | 7 | 7 | 157595 | 1429755 | -1272160 | -80.1 |
| Pets, Pet Foods, and Pet Supplies (Merchandise Lines)* | 3 | 3 | 1696631 | 2081132 | -384501 | NA |
| Healthy and Personal Care Stores | 19 | 15 | 446776 | 6051216 | -5604440 | -86.2 |
| Shoes | 2 | 2 | 66072 | 901928 | -835856 | -86.3 |
| Special Food Services | 12 | 11 | 52651 | 1147653 | -1095002 | -91.2 |
| Sporting Goods Hobby, Musical Instr Stores | 3 | 3 | 136142 | 737776 | -601634 | -68.8 |
| TOTAL: | 124 | | | | | |

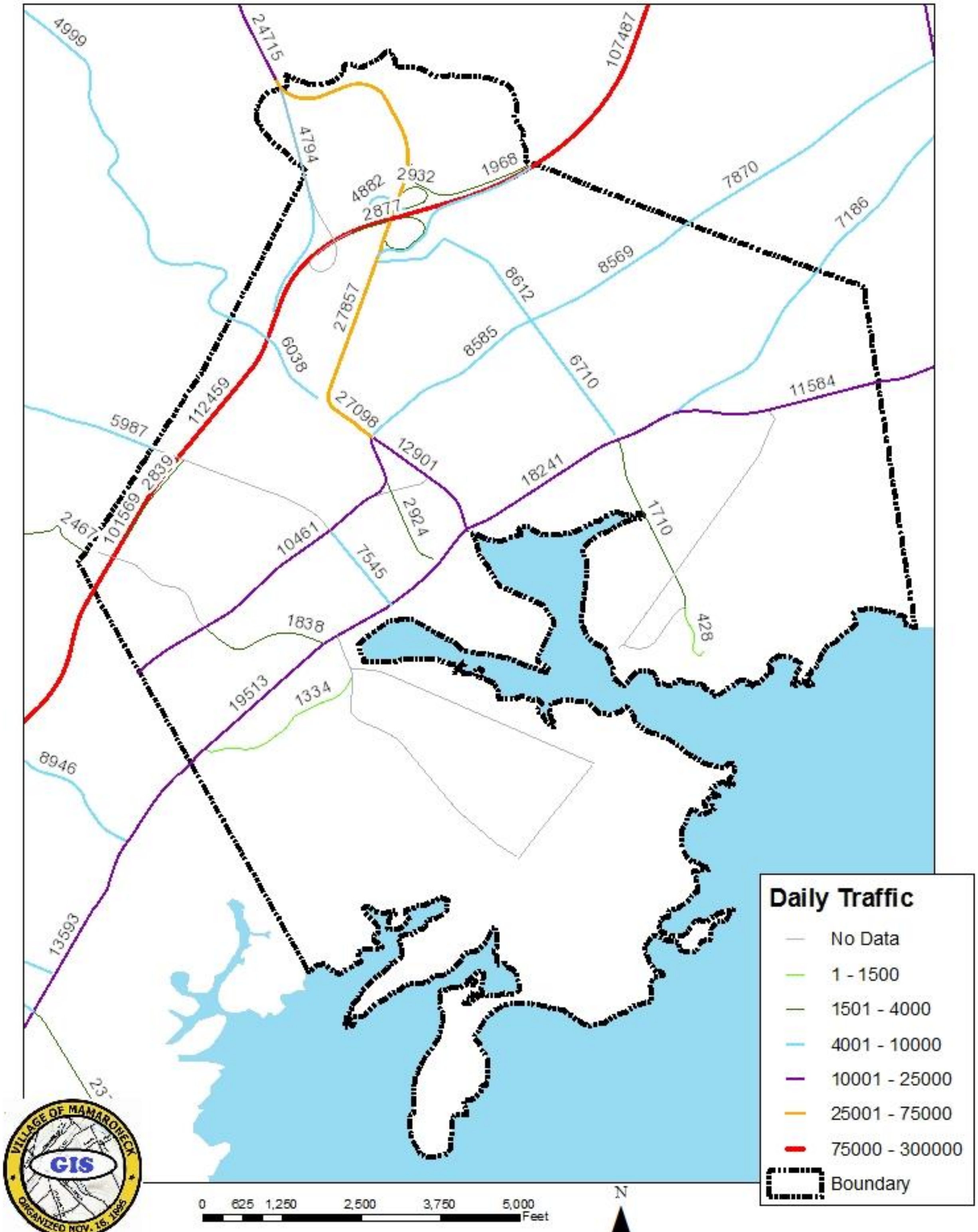
*No Leakage Seen in Any Category

*Taken from 2009 Nielsen Merchandise Line Report

| | |
|---|---|
| | Medium Surplus |
| | High Surplus |
| | Very High Surplus |



# Traffic Counts

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Source: NYS DOT 2012 Traffic Counts

# Retail MarketPlace Profile

Mamaroneck Village- 3 Mile Buffer
Area: 56.2 square miles

Latitude: 40.94642124
Longitude: -73.7321617

| Summary Demographics | |
|---|---|
| 2013 Population | 141,532 |
| 2013 Households | 50,954 |
| 2013 Median Disposable Income | $76,004 |
| 2013 Per Capita Income | $55,601 |

| Industry Summary | NAICS | Demand (Retail Potential) | Supply (Retail Sales) | Retail Gap | Leakage/Surplus Factor | Number of Businesses |
|---|---|---|---|---|---|---|
| Total Retail Trade and Food & Drink | 44-45,722 | $2,725,724,058 | $1,816,733,432 | $908,990,626 | 20.0 | 1,203 |
| Total Retail Trade | 44-45 | $2,452,758,830 | $1,590,972,274 | $861,786,556 | 21.3 | 976 |
| Total Food & Drink | 722 | $272,965,228 | $225,761,158 | $47,204,070 | 9.5 | 227 |

| Industry Group | NAICS | Demand (Retail Potential) | Supply (Retail Sales) | Retail Gap | Leakage/Surplus Factor | Number of Businesses |
|---|---|---|---|---|---|---|
| Motor Vehicle & Parts Dealers | 441 | $449,510,019 | $537,097,938 | -$87,587,919 | -8.9 | 46 |
| Automobile Dealers | 4411 | $387,353,053 | $527,179,923 | -$139,826,870 | -15.3 | 23 |
| Other Motor Vehicle Dealers | 4412 | $26,934,667 | $5,499,763 | $21,434,904 | 66 | 9 |
| Auto Parts, Accessories & Tire Stores | 4413 | $35,222,299 | $4,418,252 | $30,804,047 | 77.7 | 14 |
| Furniture & Home Furnishings Stores | 442 | $65,065,557 | $24,277,522 | $40,788,035 | 45.7 | 52 |
| Furniture Stores | 4421 | $31,451,902 | $9,114,022 | $22,337,880 | 55.1 | 16 |
| Home Furnishings Stores | 4422 | $33,613,655 | $15,163,500 | $18,450,155 | 37.8 | 36 |
| Electronics & Appliance Stores | 443 | $87,468,209 | $37,437,982 | $50,030,227 | 40.1 | 51 |
| Bldg Materials, Garden Equip. & Supply Stores | 444 | $93,648,500 | $20,231,658 | $73,416,842 | 64.5 | 42 |
| Bldg Material & Supplies Dealers | 4441 | $84,068,323 | $14,619,393 | $69,448,930 | 70.4 | 33 |
| Lawn & Garden Equip & Supply Stores | 4442 | $9,580,177 | $5,612,266 | $3,967,911 | 26.1 | 8 |
| Food & Beverage Stores | 445 | $450,634,898 | $233,170,053 | $217,464,845 | 31.8 | 183 |
| Grocery Stores | 4451 | $389,204,766 | $176,828,511 | $212,376,255 | 37.5 | 97 |
| Specialty Food Stores | 4452 | $21,577,556 | $18,361,325 | $3,216,231 | 8.1 | 59 |
| Beer, Wine & Liquor Stores | 4453 | $39,852,576 | $37,980,218 | $1,872,358 | 2.4 | 27 |
| Health & Personal Care Stores | 446,4461 | $203,760,293 | $199,589,714 | $4,170,579 | 1.0 | 80 |
| Gasoline Stations | 447,4471 | $222,831,784 | $36,154,958 | $186,676,826 | 72.1 | 43 |
| Clothing & Clothing Accessories Stores | 448 | $199,038,660 | $78,438,308 | $120,600,352 | 43.5 | 139 |
| Clothing Stores | 4481 | $147,955,132 | $53,800,285 | $94,154,847 | 46.7 | 97 |
| Shoe Stores | 4482 | $25,630,097 | $8,077,877 | $17,552,220 | 52.1 | 11 |
| Jewelry, Luggage & Leather Goods Stores | 4483 | $25,453,432 | $16,560,146 | $8,893,286 | 21.2 | 31 |
| Sporting Goods, Hobby, Book & Music Stores | 451 | $60,496,140 | $34,652,137 | $25,844,003 | 27.2 | 75 |
| Sporting Goods/Hobby/Musical Instr Stores | 4511 | $52,616,116 | $26,182,314 | $26,433,802 | 33.5 | 51 |
| Book, Periodical & Music Stores | 4512 | $7,880,024 | $8,469,823 | -$589,799 | -3.6 | 25 |
| General Merchandise Stores | 452 | $285,302,362 | $6,115,625 | $279,186,737 | 95.8 | 19 |
| Department Stores Excluding Leased Depts. | 4521 | $125,124,754 | $1,992,561 | $123,132,193 | 96.9 | 5 |
| Other General Merchandise Stores | 4529 | $160,177,608 | $4,123,064 | $156,054,544 | 95.0 | 14 |
| Miscellaneous Store Retailers | 453 | $72,952,347 | $52,130,827 | $20,821,520 | 16.6 | 207 |
| Florists | 4531 | $6,774,913 | $4,986,485 | $1,788,428 | 15.2 | 24 |
| Office Supplies, Stationery & Gift Stores | 4532 | $16,886,812 | $14,850,930 | $2,035,882 | 6.4 | 58 |
| Used Merchandise Stores | 4533 | $8,578,966 | $7,450,549 | $1,128,417 | 7.0 | 31 |
| Other Miscellaneous Store Retailers | 4539 | $40,711,655 | $24,842,864 | $15,868,791 | 24.2 | 94 |
| Nonstore Retailers | 454 | $262,050,062 | $331,675,551 | -$69,625,489 | -11.7 | 38 |
| Electronic Shopping & Mail-Order Houses | 4541 | $215,530,436 | $295,480,101 | -$79,949,665 | -15.6 | 10 |
| Vending Machine Operators | 4542 | $4,788,139 | $1,627,184 | $3,160,955 | 49.3 | 7 |
| Direct Selling Establishments | 4543 | $41,731,488 | $34,568,266 | $7,163,222 | 9.4 | 22 |
| Food Services & Drinking Places | 722 | $272,965,228 | $225,761,158 | $47,204,070 | 9.5 | 227 |
| Full-Service Restaurants | 7221 | $139,352,618 | $113,465,999 | $25,886,619 | 10.2 | 115 |
| Limited-Service Eating Places | 7222 | $100,388,669 | $86,586,424 | $13,802,245 | 7.4 | 71 |
| Special Food Services | 7223 | $24,615,208 | $16,240,842 | $8,374,366 | 20.5 | 13 |
| Drinking Places - Alcoholic Beverages | 7224 | $8,608,733 | $9,467,893 | -$859,160 | -4.8 | 27 |

**Data Note:** Supply (retail sales) estimates sales to consumers by establishments. Sales to businesses are excluded. Demand (retail potential) estimates the expected amount spent by consumers at retail establishments. Supply and demand estimates are in current dollars. The Leakage/Surplus Factor presents a snapshot of retail opportunity. This is a measure of the relationship between supply and demand that ranges from +100 (total leakage) to -100 (total surplus). A positive value represents 'leakage' of retail opportunity outside the trade area. A negative value represents a surplus of retail sales, a market where customers are drawn in from outside the trade area. The Retail Gap represents the difference between Retail Potential and Retail Sales. Esri uses the North American Industry Classification System (NAICS) to classify businesses by their primary type of economic activity. Retail establishments are classified into 27 industry groups in the Retail Trade sector, as well as four industry groups within the Food Services & Drinking Establishments subsector. For more information on the Retail MarketPlace data, please view the methodology statement at http://www.esri.com/library/whitepapers/pdfs/esri-data-retail-marketplace.pdf.

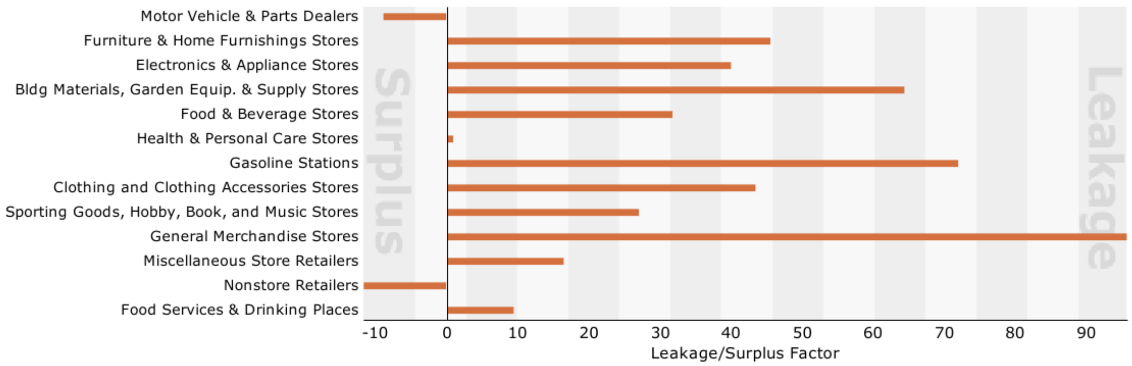
**Source:** Esri and Dun & Bradstreet. 

September 11, 2014

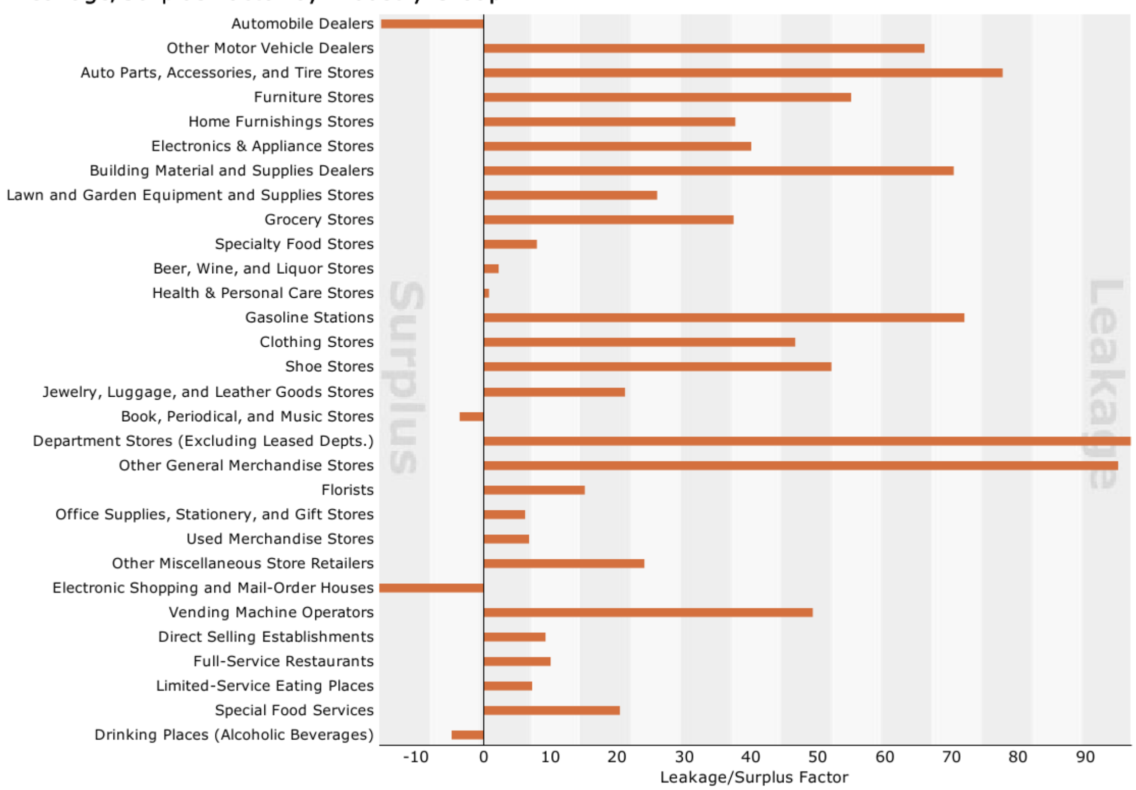
Mamaroneck Village- 3 Mile Buffer
Area: 56.2 square miles

Latitude: 40.94642124
Longitude: -73.7321617

## Leakage/Surplus Factor by Industry Subsector




## Leakage/Surplus Factor by Industry Group




**Source:** Esri and Dun & Bradstreet. 

September 11, 2014

# Executive Summary

Mamaroneck Village- 3 Mile Buffer
Area: 56.2 square miles

Latitude: 40.94642124
Longitude: -73.7321617

| | |
|---|---|
| **Median Household Income** | |
| 2014 Median Household Income | $106,380 |
| 2019 Median Household Income | $125,809 |
| 2014-2019 Annual Rate | 3.41% |
| **Average Household Income** | |
| 2014 Average Household Income | $159,316 |
| 2019 Average Household Income | $189,850 |
| 2014-2019 Annual Rate | 3.57% |
| **Per Capita Income** | |
| 2014 Per Capita Income | $57,645 |
| 2019 Per Capita Income | $68,762 |
| 2014-2019 Annual Rate | 3.59% |

**Households by Income**

Current median  household income is $106,380 in the area, compared to $52,076 for all U.S. households. Median household income is projected to be $125,809 in five years, compared to $59,599 for all U.S. households

Current average household income is $159,316 in this area, compared to $72,809 for all U.S. households.  Average household income is projected to be $189,850 in five years, compared to $83,937 for all U.S. households

Current per capita income is $57,645 in the area, compared to the U.S. per capita income of $27,871.  The per capita income is projected to be $68,762 in five years, compared to $32,168 for all U.S. households

| | |
|---|---|
| **Housing** | |
| 2000 Total Housing Units | 51,257 |
| 2000 Owner Occupied Housing Units | 32,573 |
| 2000 Renter Occupied Housing Units | 17,204 |
| 2000 Vacant Housing Units | 1,480 |
| 2010 Total Housing Units | 54,266 |
| 2010 Owner Occupied Housing Units | 33,420 |
| 2010 Renter Occupied Housing Units | 17,775 |
| 2010 Vacant Housing Units | 3,071 |
| 2014 Total Housing Units | 54,800 |
| 2014 Owner Occupied Housing Units | 33,175 |
| 2014 Renter Occupied Housing Units | 18,136 |
| 2014 Vacant Housing Units | 3,490 |
| 2019 Total Housing Units | 56,253 |
| 2019 Owner Occupied Housing Units | 33,784 |
| 2019 Renter Occupied Housing Units | 18,719 |
| 2019 Vacant Housing Units | 3,749 |

Currently, 60.5% of the 54,800 housing units in the area are owner occupied; 33.1%, renter occupied; and 6.4% are vacant.  Currently, in the U.S., 56.0% of the housing units in the area are owner occupied; 32.4% are renter occupied; and 11.6% are vacant.  In 2010, there were 54,266 housing units in the area - 61.6% owner occupied, 32.8% renter occupied, and 5.7% vacant.  The annual rate of change in housing units since 2010 is 0.44%. Median home value in the area is $665,327, compared to a median home value of $190,791 for the U.S. In five years, median value is projected to change by 3.88% annually to $804,935.

**Data Note:** Income is expressed in current dollars
**Source:** U.S. Census Bureau, Census 2010 Summary File 1. Esri forecasts for 2014 and 2019. Esri converted Census 2000 data into 2010 geography.

September 11, 2014

# Executive Summary

Mamaroneck Village- 3 Mile Buffer
Area: 56.2 square miles

Latitude: 40.94642124
Longitude: -73.7321617

| Population | |
|---|---|
| 2000 Population | 137,065 |
| 2010 Population | 142,220 |
| 2014 Population | 142,640 |
| 2019 Population | 145,837 |
| 2000-2010 Annual Rate | 0.37% |
| 2010-2014 Annual Rate | 0.07% |
| 2014-2019 Annual Rate | 0.44% |
| 2014 Male Population | 48.3% |
| 2014 Female Population | 51.7% |
| 2014 Median Age | 41.1 |

In the identified area, the current year population is 142,640. In 2010, the Census count in the area was 142,220. The rate of change since 2010 was 0.07% annually. The five-year projection for the population in the area is 145,837 representing a change of 0.44% annually from 2014 to 2019. Currently, the population is 48.3% male and 51.7% female.

**Median Age**

The median age in this area is 41.1, compared to U.S. median age of 37.7.

| Race and Ethnicity | |
|---|---|
| 2014 White Alone | 75.0% |
| 2014 Black Alone | 10.1% |
| 2014 American Indian/Alaska Native Alone | 0.3% |
| 2014 Asian Alone | 6.2% |
| 2014 Pacific Islander Alone | 0.0% |
| 2014 Other Race | 5.5% |
| 2014 Two or More Races | 2.9% |
| 2014 Hispanic Origin (Any Race) | 17.8% |

Persons of Hispanic origin represent 17.8% of the population in the identified area compared to 17.5% of the U.S. population. Persons of Hispanic Origin may be of any race. The Diversity Index, which measures the probability that two people from the same area will be from different race/ethnic groups, is 59.3 in the identified area, compared to 62.6 for the U.S. as a whole.

| Households | |
|---|---|
| 2000 Households | 49,777 |
| 2010 Households | 51,195 |
| 2014 Total Households | 51,310 |
| 2019 Total Households | 52,504 |
| 2000-2010 Annual Rate | 0.28% |
| 2010-2014 Annual Rate | 0.05% |
| 2014-2019 Annual Rate | 0.46% |
| 2014 Average Household Size | 2.71 |

The household count in this area has changed from 51,195 in 2010 to 51,310 in the current year, a change of 0.05% annually. The five-year projection of households is 52,504, a change of 0.46% annually from the current year total. Average household size is currently 2.71, compared to 2.71 in the year 2010. The number of families in the current year is 36,047 in the specified area.

**Data Note:** Income is expressed in current dollars
**Source:** U.S. Census Bureau, Census 2010 Summary File 1. Esri forecasts for 2014 and 2019. Esri converted Census 2000 data into 2010 geography.

September 11, 2014

# Retail MarketPlace Profile

361190072.001
361190072001
Geography: Block Group

| Summary Demographics | | | | | | |
|---|---|---|---|---|---|---|
| 2013 Population | | | | | | 1,004 |
| 2013 Households | | | | | | 420 |
| 2013 Median Disposable Income | | | | | | $31,168 |
| 2013 Per Capita Income | | | | | | $38,734 |
| **Industry Summary** | **NAICS** | **Demand** (Retail Potential) | **Supply** (Retail Sales) | **Retail Gap** | **Leakage/Surplus Factor** | **Number of Businesses** |
| Total Retail Trade and Food & Drink | 44-45,722 | $6,167,730 | $41,684,247 | -$35,516,517 | -74.2 | 71 |
| Total Retail Trade | 44-45 | $5,513,013 | $30,273,416 | -$24,760,403 | -69.2 | 54 |
| Total Food & Drink | 722 | $654,717 | $11,410,831 | -$10,756,114 | -89.1 | 17 |
| **Industry Group** | **NAICS** | **Demand** (Retail Potential) | **Supply** (Retail Sales) | **Retail Gap** | **Leakage/Surplus Factor** | **Number of Businesses** |
| Motor Vehicle & Parts Dealers | 441 | $929,948 | $3,311,532 | -$2,381,584 | -56.1 | 2 |
| Automobile Dealers | 4411 | $811,780 | $3,113,609 | -$2,301,829 | -58.6 | 1 |
| Other Motor Vehicle Dealers | 4412 | $43,785 | $0 | $43,785 | 100 | 0 |
| Auto Parts, Accessories & Tire Stores | 4413 | $74,383 | $197,923 | -$123,540 | -45.4 | 1 |
| Furniture & Home Furnishings Stores | 442 | $138,856 | $1,098,416 | -$959,560 | -77.6 | 3 |
| Furniture Stores | 4421 | $69,700 | $1,098,416 | -$1,028,716 | -88.1 | 3 |
| Home Furnishings Stores | 4422 | $69,156 | $0 | $69,156 | 100.0 | 0 |
| Electronics & Appliance Stores | 443 | $188,894 | $3,449,881 | -$3,260,987 | -89.6 | 5 |
| Bldg Materials, Garden Equip. & Supply Stores | 444 | $131,841 | $359,776 | -$227,935 | -46.4 | 2 |
| Bldg Material & Supplies Dealers | 4441 | $115,060 | $359,776 | -$244,716 | -51.5 | 2 |
| Lawn & Garden Equip & Supply Stores | 4442 | $16,781 | $0 | $16,781 | 100.0 | 0 |
| Food & Beverage Stores | 445 | $1,133,957 | $10,222,663 | -$9,088,706 | -80.0 | 12 |
| Grocery Stores | 4451 | $988,952 | $1,567,915 | -$578,963 | -22.6 | 4 |
| Specialty Food Stores | 4452 | $55,342 | $875,125 | -$819,783 | -88.1 | 6 |
| Beer, Wine & Liquor Stores | 4453 | $89,663 | $7,779,623 | -$7,689,960 | -97.7 | 2 |
| Health & Personal Care Stores | 446,4461 | $446,776 | $6,051,216 | -$5,604,440 | -86.2 | 4 |
| Gasoline Stations | 447,4471 | $507,391 | $0 | $507,391 | 100.0 | 0 |
| Clothing & Clothing Accessories Stores | 448 | $476,862 | $3,432,792 | -$2,955,930 | -75.6 | 9 |
| Clothing Stores | 4481 | $362,721 | $1,541,751 | -$1,179,030 | -61.9 | 5 |
| Shoe Stores | 4482 | $66,072 | $901,928 | -$835,856 | -86.3 | 1 |
| Jewelry, Luggage & Leather Goods Stores | 4483 | $48,069 | $989,113 | -$941,044 | -90.7 | 3 |
| Sporting Goods, Hobby, Book & Music Stores | 451 | $136,142 | $737,776 | -$601,634 | -68.8 | 4 |
| Sporting Goods/Hobby/Musical Instr Stores | 4511 | $117,987 | $175,790 | -$57,803 | -19.7 | 2 |
| Book, Periodical & Music Stores | 4512 | $18,155 | $561,986 | -$543,831 | -93.7 | 2 |
| General Merchandise Stores | 452 | $673,117 | $179,609 | $493,508 | 57.9 | 1 |
| Department Stores Excluding Leased Depts. | 4521 | $282,791 | $0 | $282,791 | 100.0 | 0 |
| Other General Merchandise Stores | 4529 | $390,326 | $179,609 | $210,717 | 37.0 | 1 |
| Miscellaneous Store Retailers | 453 | $157,595 | $1,429,755 | -$1,272,160 | -80.1 | 12 |
| Florists | 4531 | $11,587 | $298,520 | -$286,933 | -92.5 | 1 |
| Office Supplies, Stationery & Gift Stores | 4532 | $37,379 | $372,895 | -$335,516 | -81.8 | 6 |
| Used Merchandise Stores | 4533 | $18,782 | $0 | $18,782 | 100.0 | 0 |
| Other Miscellaneous Store Retailers | 4539 | $89,847 | $758,340 | -$668,493 | -78.8 | 5 |
| Nonstore Retailers | 454 | $591,634 | $0 | $591,634 | 100.0 | 0 |
| Electronic Shopping & Mail-Order Houses | 4541 | $471,604 | $0 | $471,604 | 100.0 | 0 |
| Vending Machine Operators | 4542 | $12,235 | $0 | $12,235 | 100.0 | 0 |
| Direct Selling Establishments | 4543 | $107,795 | $0 | $107,795 | 100.0 | 0 |
| Food Services & Drinking Places | 722 | $654,717 | $11,410,831 | -$10,756,114 | -89.1 | 17 |
| Full-Service Restaurants | 7221 | $338,091 | $7,409,529 | -$7,071,438 | -91.3 | 9 |
| Limited-Service Eating Places | 7222 | $240,836 | $1,976,659 | -$1,735,823 | -78.3 | 6 |
| Special Food Services | 7223 | $52,651 | $1,147,653 | -$1,095,002 | -91.2 | 1 |
| Drinking Places - Alcoholic Beverages | 7224 | $23,139 | $876,990 | -$853,851 | -94.9 | 1 |

**Data Note:** Supply (retail sales) estimates sales to consumers by establishments. Sales to businesses are excluded. Demand (retail potential) estimates the expected amount spent by consumers at retail establishments. Supply and demand estimates are in current dollars. The Leakage/Surplus Factor presents a snapshot of retail opportunity. This is a measure of the relationship between supply and demand that ranges from +100 (total leakage) to -100 (total surplus). A positive value represents 'leakage' of retail opportunity outside the trade area. A negative value represents a surplus of retail sales, a market where customers are drawn in from outside the trade area. The Retail Gap represents the difference between Retail Potential and Retail Sales. Esri uses the North American Industry Classification System (NAICS) to classify businesses by their primary type of economic activity. Retail establishments are classified into 27 industry groups in the Retail Trade sector, as well as four industry groups within the Food Services & Drinking Establishments subsector. For more information on the Retail MarketPlace data, please view the methodology statement at http://www.esri.com/library/whitepapers/pdfs/esri-data-retail-marketplace.pdf.

**Source:** Esri and Dun & Bradstreet. 

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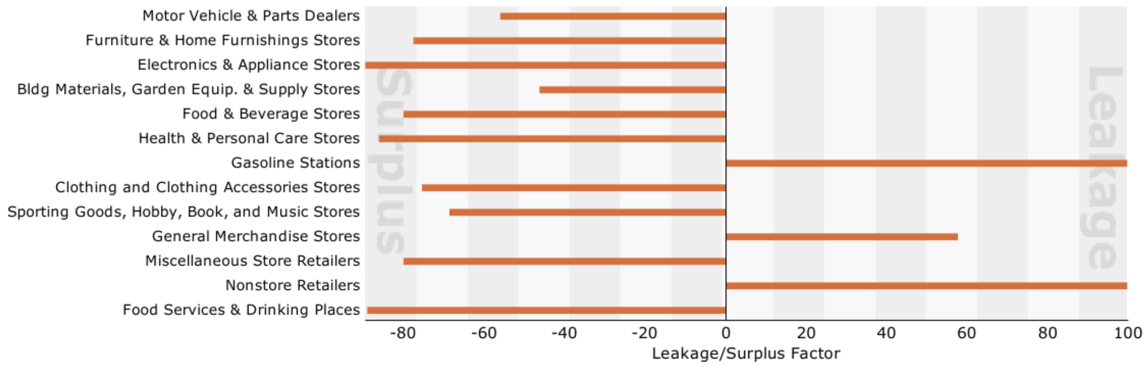
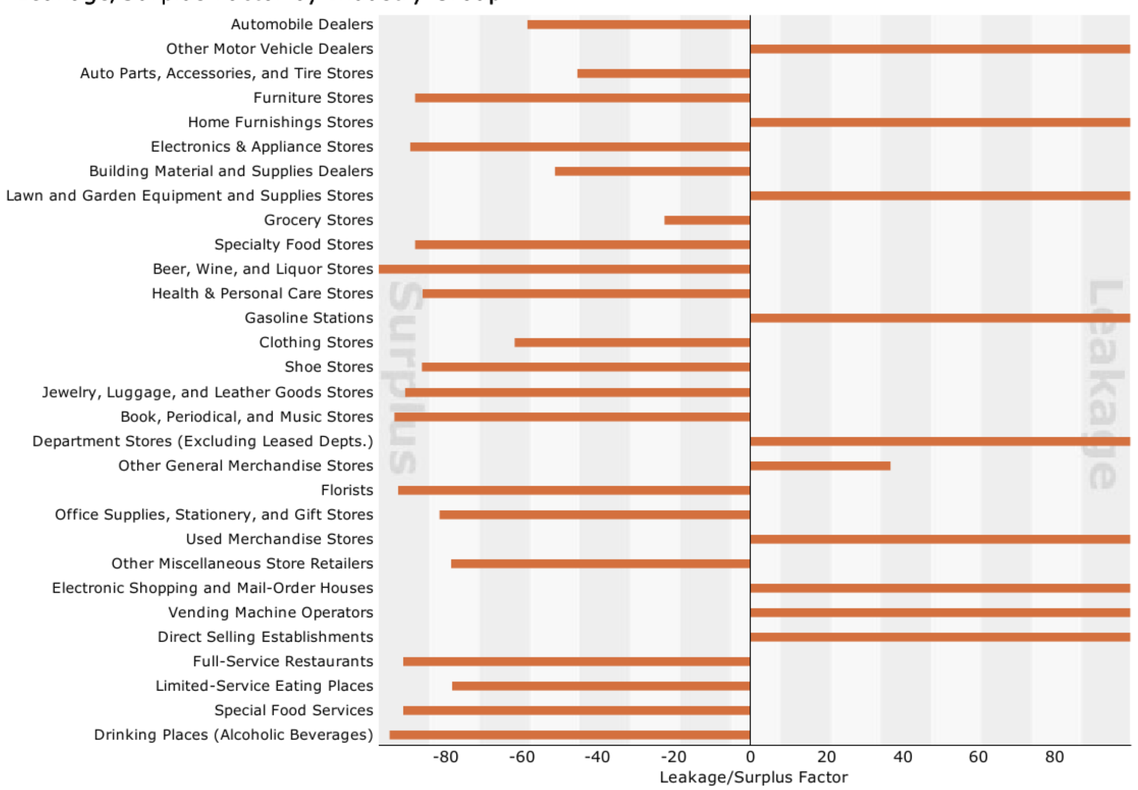
Retail MarketPlace Profile

361190072.001
361190072001
Geography: Block Group

## Leakage/Surplus Factor by Industry Subsector




## Leakage/Surplus Factor by Industry Group



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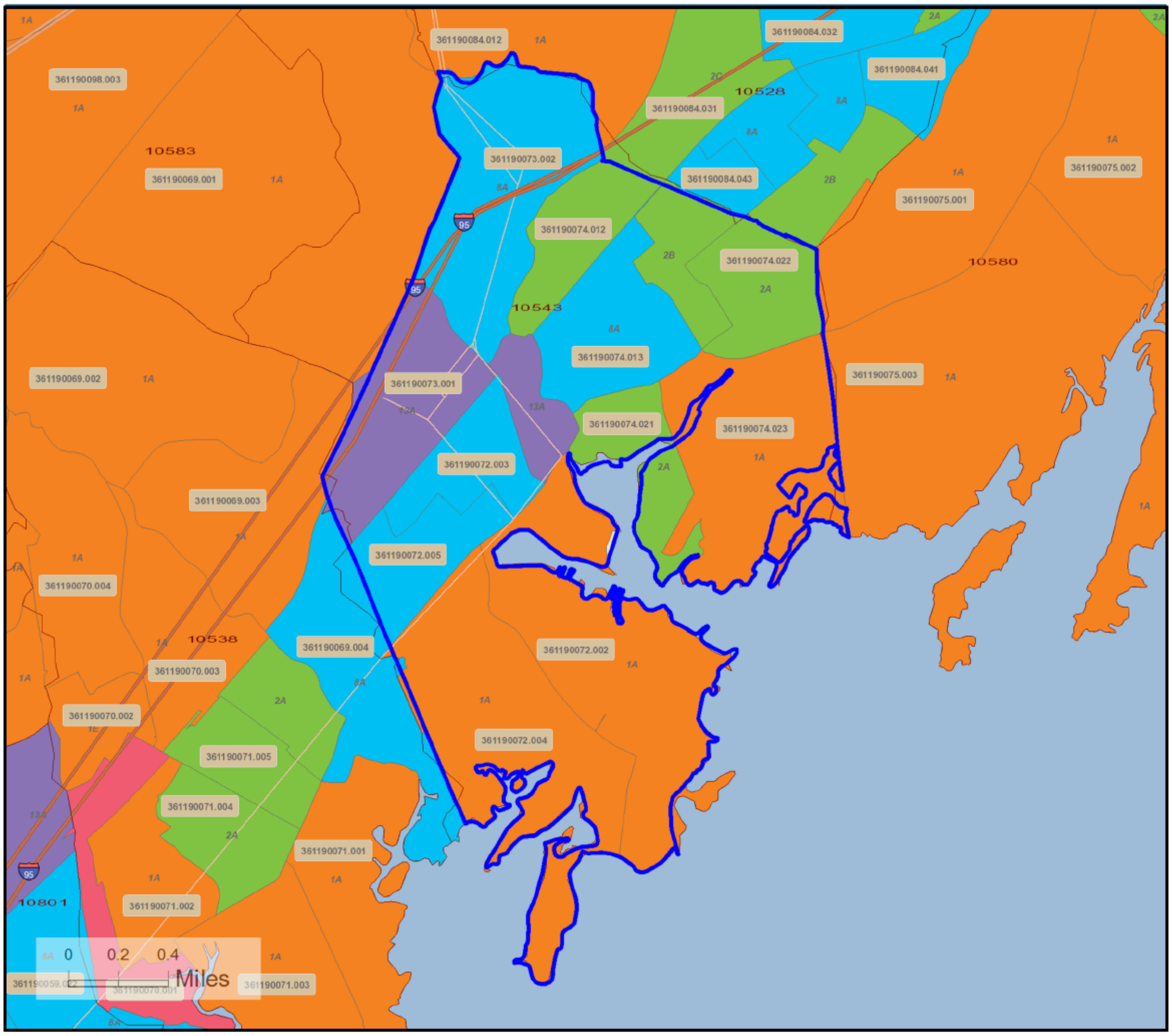
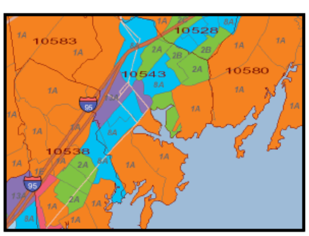
# Dominant Tapestry Map

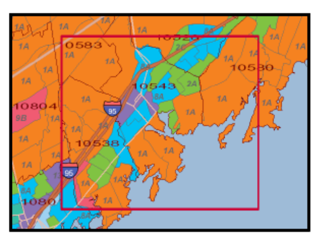
Mamaroneck Village, NY
Mamaroneck village, NY (3644831)
Place



## Tapestry LifeMode

- L1: Affluent Estates
- L2: Upscale Avenues
- L3: Uptown Individuals
- L4: Family Landscapes
- L5: GenXurban
- L6: Cozy Country
- L7: Ethnic Enclaves
- L8: Middle Ground
- L9: Senior Styles
- L10: Rustic Outposts
- L11: Midtown Singles
- L12: Hometown
- L13: Next Wave
- L14: Scholars and Patriots



**Source:** Esri

September 10, 2014