

Hammond Retail Study

February 2007

**Southeastern Louisiana University
Business Research Center**

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February 28, 2007

The following study was commissioned by Mayson Foster, Mayor of Hammond, Louisiana to study the retail environment in the greater Hammond area.

The Southeastern Louisiana University's Business Research Center (BRC) is jointly operated by the Southeast Louisiana Business Center and the College of Business. The BRC provides applied economic analysis and research studies that aide business and economic development efforts for the five Florida parishes in southeast Louisiana. The center represents one aspect of the university's commitment to economic development in the region.

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The following study or analysis was conducted by Southeastern Louisiana University's Business Research Center using generally accepted research methods, models and techniques. Research projects are often commissioned and paid for by government, business and industry. Federal, state, or local government grants are also utilized to fund research projects.

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Sincerely,

A handwritten signature in black ink that reads 'William Joubert'. The signature is written in a cursive style with a long, sweeping tail on the 't'.

William Joubert, Director
Business Research Center

Summary

Southeastern Louisiana University's Business Research Center was commissioned by Mayson Foster, Mayor of Hammond, Louisiana, to study the retail environment in the greater Hammond area. This study was to specifically address three principal areas: 1) Determine the amount of retail space currently occupied in Hammond. 2) Determine the place of residence of shoppers in Hammond in order to discover the area from which shoppers are drawn. 3) Determine the share of retail sales in Hammond that are to customers located outside the city of Hammond, and the share of area retail sales that are accounted for by retailers within the city.

Methodology

It was determined that a four-step process would be necessary to provide the requested information. The first step was to define the Hammond retail trading area. Second step was a telephone survey of all identified retail establishments within the city of Hammond to determine the retail space available and currently occupied. The third step consisted of an intercept survey to determine the place of residence of customers at shopping centers in Hammond and within 25 miles of the city. The fourth step was a survey of secondary data on retail purchases and sales in Hammond, Tangipahoa Parish, and the surrounding north shore area in order to determine the share of retail sales taking place in Hammond to customers residing outside the city, and the share of retail purchases in each area supplied by retailers within the city.

Hammond Retail Trade Area

The Hammond Retail Area includes 17 zip codes between Walker and Covington, and stretching from French Settlement to Amite. It was hypothesized that the majority of shoppers in Hammond would be drawn from this area. A map of the Hammond Retail Area is attached as Figure 1.

Retail Space Survey Method

In order to determine the existing retail environment, all licensed retailers in the city were first identified. A total of 1393 potential retail establishments were identified. Removing those that were unreachable and firms whose primary business is not retail sales left a remainder of 584 firms. All of these firms were contacted by telephone in order to determine the current retail space and to confirm the type of business enterprise.

Intercept Survey Method

An intercept survey of shoppers was conducted in Hammond and at a shopping center in the Covington/Mandeville area. Residents of Hammond were identified by zip code. The goals of this process were to determine the proportion of Hammond residents and the number of non-residents at locations in Hammond, and in nearby shopping centers. Two locations within Hammond, and two large shopping centers near Hammond were selected. The locations outside the city were a shopping center in the Covington/ Madisonville area off Interstate 12, and a shopping center in Walker. These two sites are approximately 19 and 25 miles from the center of Hammond.

A sampling plan was chosen, including number of shoppers surveyed, in order to determine the proportion of Hammond residents and the number of non-residents at each location, with no more than a 3 percent margin of error. Because of an inability to gain permission from some large retailers to conduct a survey of their customers, data collection in the city of Hammond was scaled back (margin of error approximately 4 percent) and no data were collected from the Walker location.

Secondary Analysis of Retail Purchases and Sales

Data used were provided by Claritas, Inc. The volume of retail purchases reported by residents of Hammond were derived from the Consumer Expenditure Survey of the U.S. Bureau of Labor Statistics, and sales data are derived from the Census of Retail Trade reported by the U.S. Census. The reported purchases are used as a measure of demand, and reported sales are used as a measure of the supply of retail sales. Reported sales data by retail establishments within the city were compared to reported retail purchase data in order to determine the surplus or shortage of retail sales, by major sectors.

Retail purchases and sales in Hammond were compared to retail purchases and sales in three wider areas, Tangipahoa Parish, the Hammond Retail Area, and the broader North Shore area, defined as the five Florida parishes of Livingston, St. Helena, St. Tammany, Tangipahoa, and Washington. Retail sales data for the city of Hammond were compared to area retail purchases, by major sectors, in order to determine the share of area retail purchases accounted for by retailers within the city of Hammond.

Two measures were used in order to identify those sectors with substantial sales to customers outside the city limits of Hammond. These are; the share of sales to customers residing outside the city, and the surplus in reported sector sales within the city minus the reported sector purchases. Among the sectors with the smallest share of local sales were motor vehicle and parts dealers, health and personal care stores, general merchandise stores, and gasoline stations. These retail sectors are among those with the greatest “pull” factor -- those with the largest share of sales accounted for by customers from outside the city limits.

Sectors in which Hammond retailers have been successful in attracting customers from a broader region were identified, along with those sectors in which there exists a regional shortage of supply. Sectors in which Hammond retailers have been successful in attracting customers from a broader region and in which there exists an “opportunity gap” in a broader region could serve as an opportunity for Hammond retail establishments to attract additional regional customers.

Conclusions

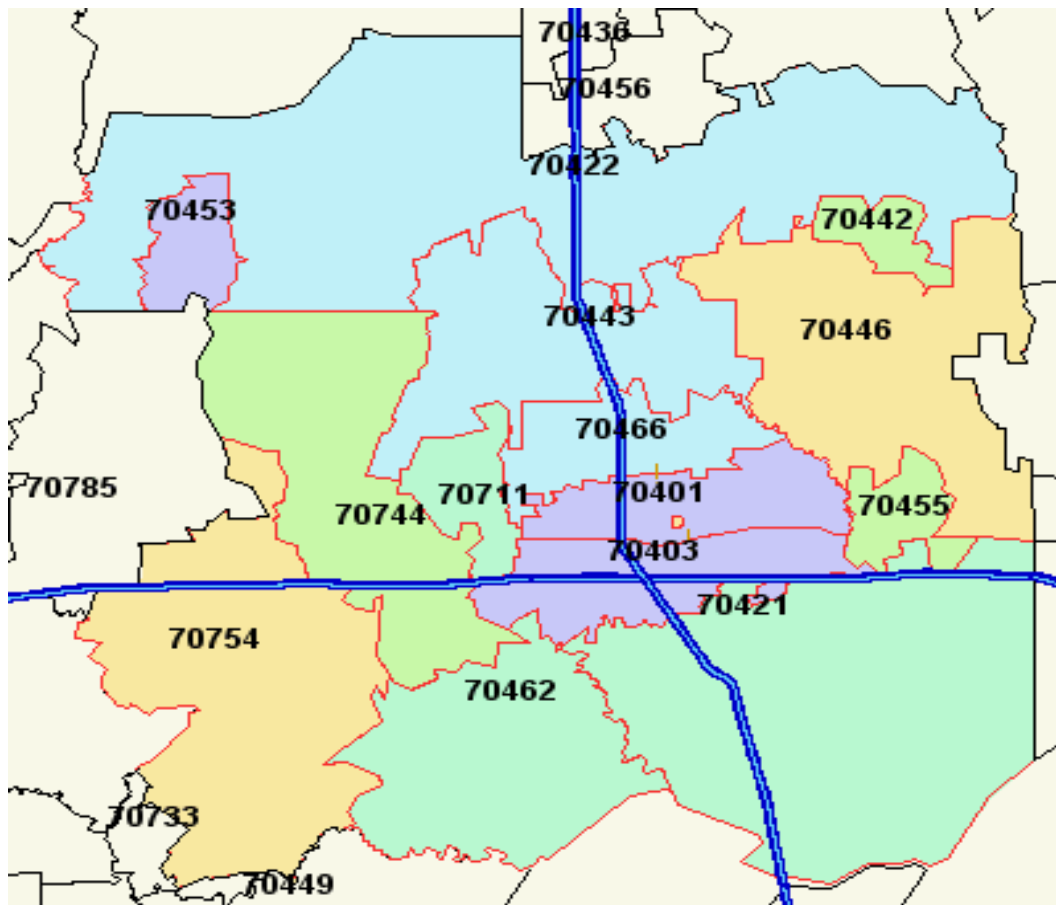
There is nearly 2.5 million square feet of existing retail sales space in Hammond. The vast majority of this sales area is in establishments with over 1,000 square feet of sales space.

Approximately one-third of customers and one-third of sales by retailers within the city of Hammond are to residents that live within the city limits. Retailers within the city of Hammond currently attract the majority of their sales volume from customers that reside within the area identified as the Hammond Retail Area. Sales by retailers in Hammond exceed purchases by city residents in every major sector except non-store sales.

Although the population of Hammond is only 14.1 percent of that in the Hammond Retail Area as a whole, sales by retailers in Hammond account for 39.2 percent of sales in the area. Retail sales within the city of Hammond are equivalent to over 40.0 percent of area purchases in the sectors of foodservice and drinking places, motor vehicles and parts, miscellaneous store retailers (such as florists, office supplies, stationary, and gift stores), and health and personal care stores. There are significant shortages within the retail area in the sectors of electronics and appliance stores, and clothing accessory stores. Shortages in these sectors may provide retailers in the city an opportunity to further expand sales in the Hammond Retail Area.

Hammond retailers account for only a small share of purchases within the north shore area. However, for three of the five sectors in which Hammond retailers have the greatest calculated surplus; motor vehicles and parts, health and personal care, and foodservice and drinking; the north shore area has a calculated shortage of sales, or “opportunity gap.” Purchases by north shore residents from retailers outside the area exceed the Hammond surplus and the Tangipahoa Parish surplus in each of these sectors. This suggests that these are the sectors in which north shore area residents are most willing to travel to a retail hub to do their shopping. These sectors should offer the greatest opportunity for retailers in Hammond to expand sales to the broader north shore region.

Figure 1: Zip Codes covering the Hammond Retail Area



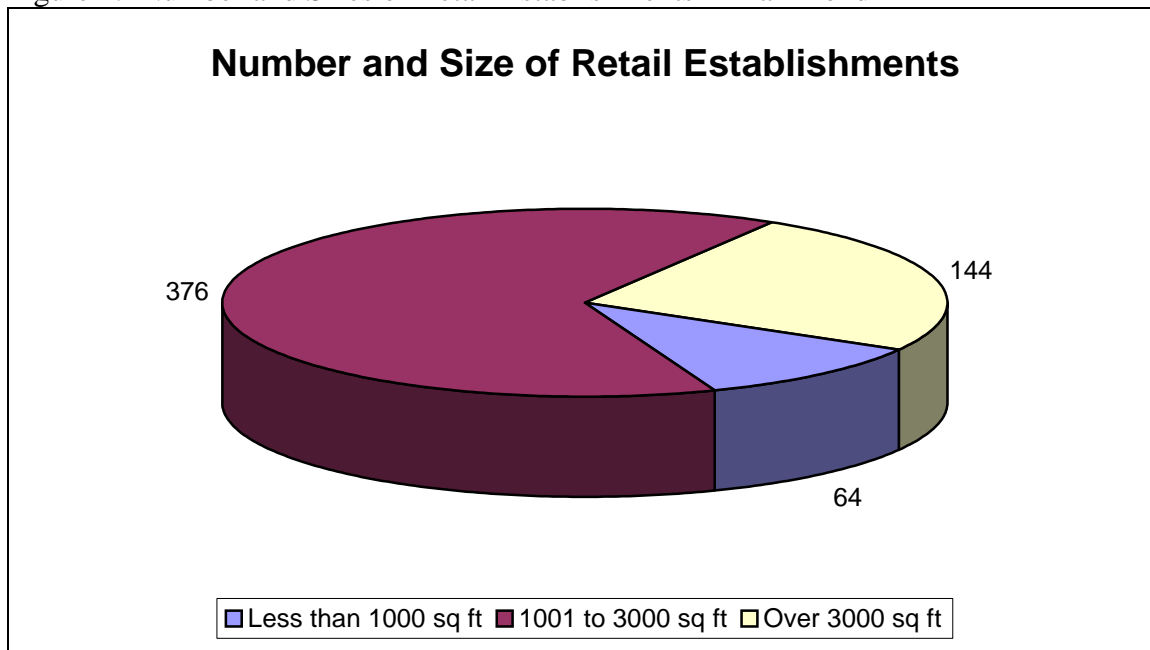
Report

Retail Space Survey

A total of 1393 potential retail establishments were identified. Removing those that were unreachable and firms whose primary business is not retail sales left a remainder of 584 firms. All of these firms were contacted by telephone in order to determine the current retail space and to confirm the type of business enterprise.

The total square footage of retail sales area reported by those businesses that are currently engaged primarily in retail sales in Hammond is 2.5 million square feet. The majority of establishments reported a retail sales area between 1001 and 3000 square feet. Thirty establishments reported a sales area of over 10,000 square feet. Appendix A includes the contract with Mark L. Gray and Associates to perform the telephone surveys, the survey instrument, and complete telephone survey results. Findings are presented as Figure 2.

Figure 2: Number and Sizes of Retail Establishments in Hammond



Intercept Surveys

Intercept surveys of shoppers were conducted in Hammond and at a shopping center in the Covington/Mandeville area. Two locations within Hammond, and two large shopping centers near Hammond were selected. The locations outside the city were a shopping center in the Covington/Madisonville area off Interstate 12, and a shopping center in Walker. These two sites are approximately 19 and 25 miles from the center of Hammond.

Shoppers were identified by the zip code in which they reside. Shoppers were classified as residents of the city of Hammond, residents of the Hammond Retail Area, or as residents from outside the Hammond Retail Area. From previous experience, researchers hypothesized that retailers in the city of Hammond would be able to attract customers from the Hammond Retail Area – an area that includes 17 zip codes between Walker and Covington, and stretches from French Settlement to Amite. It was hypothesized that the majority of shoppers in Hammond would be drawn from this area.

Previous research by Prism Business Media had shown that the majority of customers visit shopping centers on weekends: (60.3% with 91.1% of those between 8:00am and 8:00pm), and fewer on weekdays (39.7% with 85.3% of those between 8:00am and 8:00pm). A sampling plan was chosen, including number of shoppers surveyed, in order to determine the proportion of Hammond residents and the number of non-residents at each location, with no more than a 3 percent margin of error. Because of an inability to gain permission from some large retailers to conduct a survey of their customers, data collection in the city of Hammond was scaled back (margin of error approximately 4 percent) and no data were collected from the Walker location.

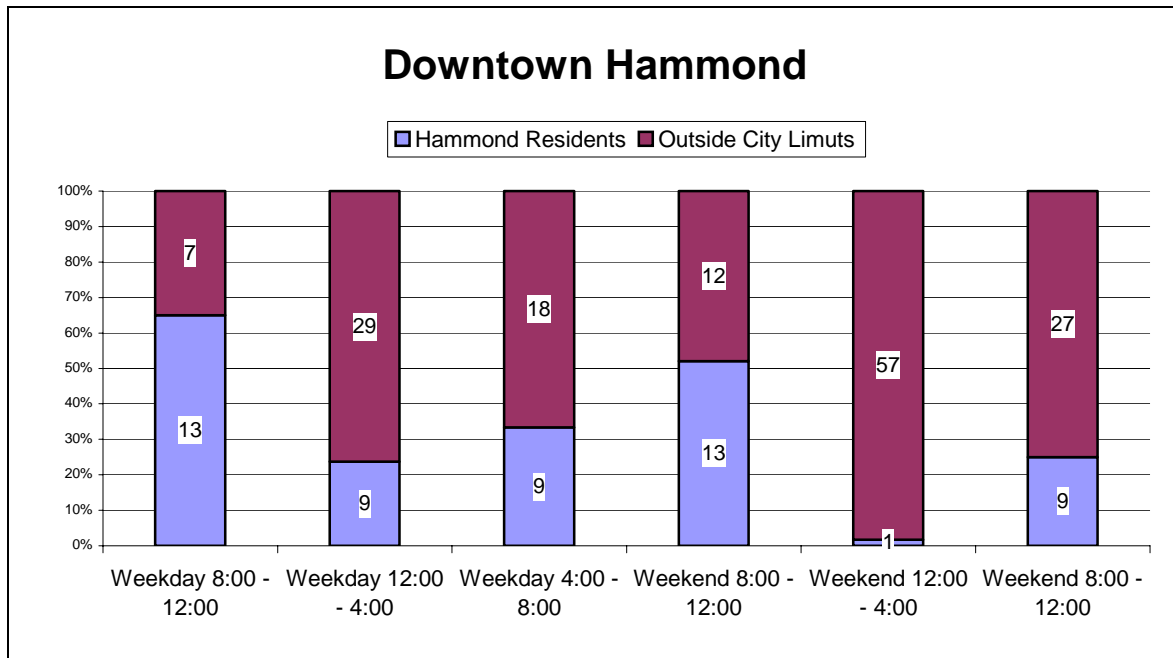
The intercept survey results indicate that less than half of the shoppers in downtown Hammond, and slightly less than one-third of the shoppers in the Hammond Square Mall reside within the city limits of Hammond. Of 204 shoppers surveyed in the downtown shopping area, 43.1 percent reside in the city. Of 399 shoppers surveyed in the Hammond Square Mall area, 29.8 percent reside in the city. Among all 603 shoppers surveyed in Hammond, 207 or 34.3 percent reside within the city limits. Shoppers from within the city limits of Hammond made up a much smaller share of those shopping at the Covington/Madisonville location. Of 772 shoppers surveyed in that location, only 8.1 percent reside in the zip codes identified as lying within the city limits of Hammond. The Covington/Madisonville shopping center is some 19 miles from the center of Hammond, and approximately 17 miles from the city limits. The results of the intercept survey are presented in Figure 3.

As noted earlier, retail establishments in Hammond draw shoppers from a broader area than the city limits. Researchers defined the Hammond Retail Area as the area covered by seventeen zip codes. These include: 70401, 70402, 70403, 70404, 70422, 70442, 70443, 70446, 70451, 70453, 70454, 70455, 70462, 70466, 70711, 70744 and 70754.¹ The intercept survey results indicate that slightly less than three fourths of shoppers in Hammond reside in the identified retail area.

¹ A major retail chain with locations in Hammond and Walker that was unable to supply specific data on its customers did provide information on the zip codes to which circulars are sent advertising its sales at its Hammond location. Circulars advertising the Hammond location are sent to residents in 24 zip codes, including all zip codes identified as the Hammond retail area, with the exceptions of 70404 (primarily post office boxes), 70451 (Natalbany), and 70453 (Pine Grove).

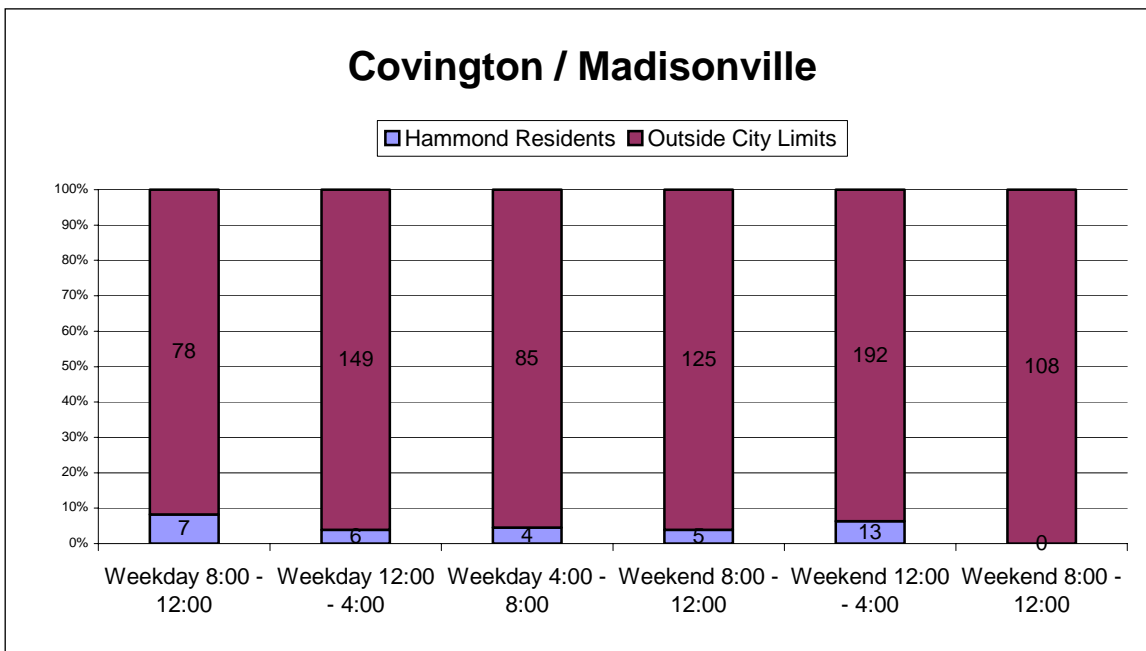
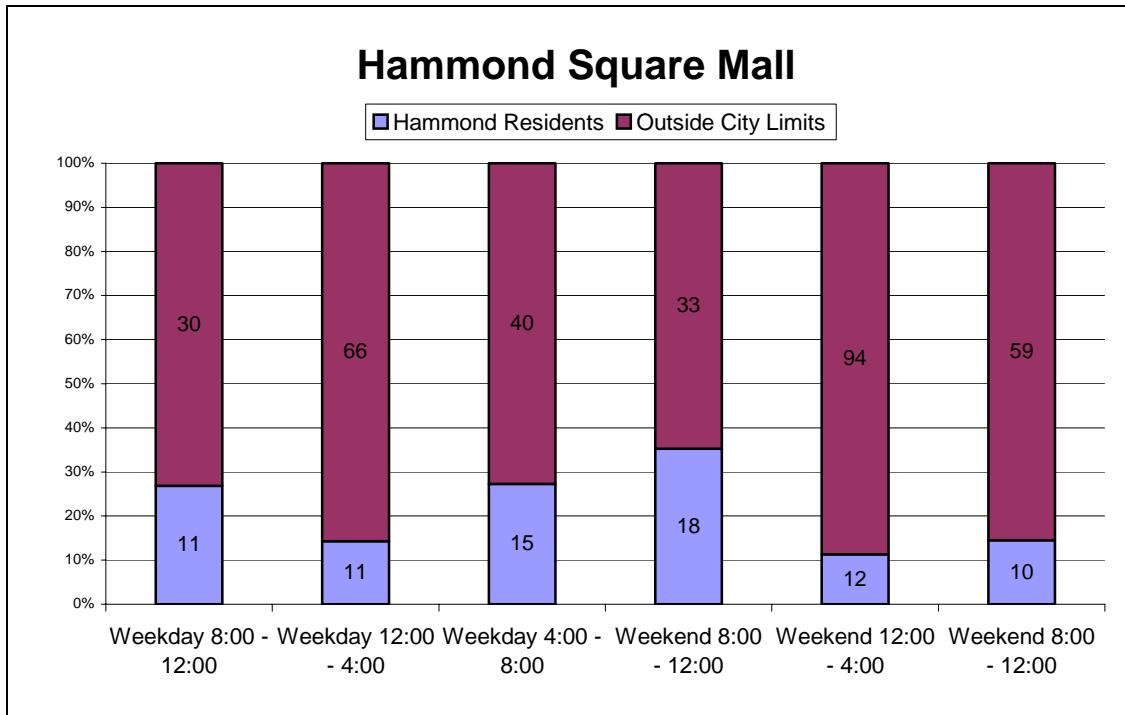
Of 399 shoppers surveyed in the Hammond Square Mall area, 73.2 percent reside in the retail area. Of 204 shoppers surveyed in the downtown shopping area, 71.1 percent reside in the retail area.²

Figure 3:



² The initial sampling plan called for additional surveys to be conducted in the Hammond area, and at a retail site in Walker. Due to the inability to secure permission to perform intercept sampling from some retailers, the Walker retail site was abandoned and the sample size for the Hammond retail area was significantly reduced. In total, there were 603 data points collected (Downtown, n = 204; Mall, n = 399) within the Hammond retail area, and 772 data points collected at the Covington retail site surveyed. Under these new conditions, the acceptable error for the Hammond retail area increased to $\pm 4\%$.

Figure 3: *Continued* -- Hammond Residents Among Total Shoppers



Residents of the Hammond Retail Area comprise a much smaller share of shoppers in the Covington/Madisonville location. Of 772 shoppers surveyed in this location, 17.0 percent reside in the zip codes identified as lying within the Hammond Retail Area. Full results of the intercept survey are reported in Appendix B.

In the Hammond locations surveyed, fewer shoppers were found to reside in the northern portion of the Hammond Retail Area than reside within the city limits or the southern portion of the retail area. The same was not true of the Covington/Madisonville location. Although the total number of shoppers at this location that reside in the Hammond Retail Area was fairly small, the number that reside in the northern portion of the retail area was slightly higher than the number that reside in the southern portion. See Figure 4.

Figure 4: Shoppers Place of Residence

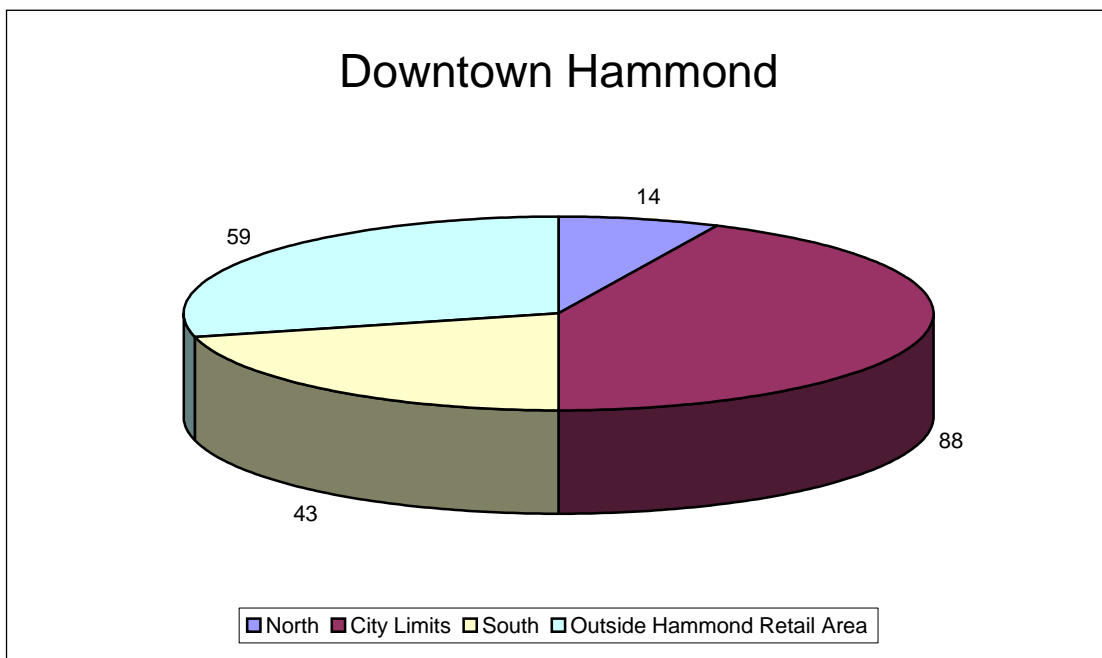
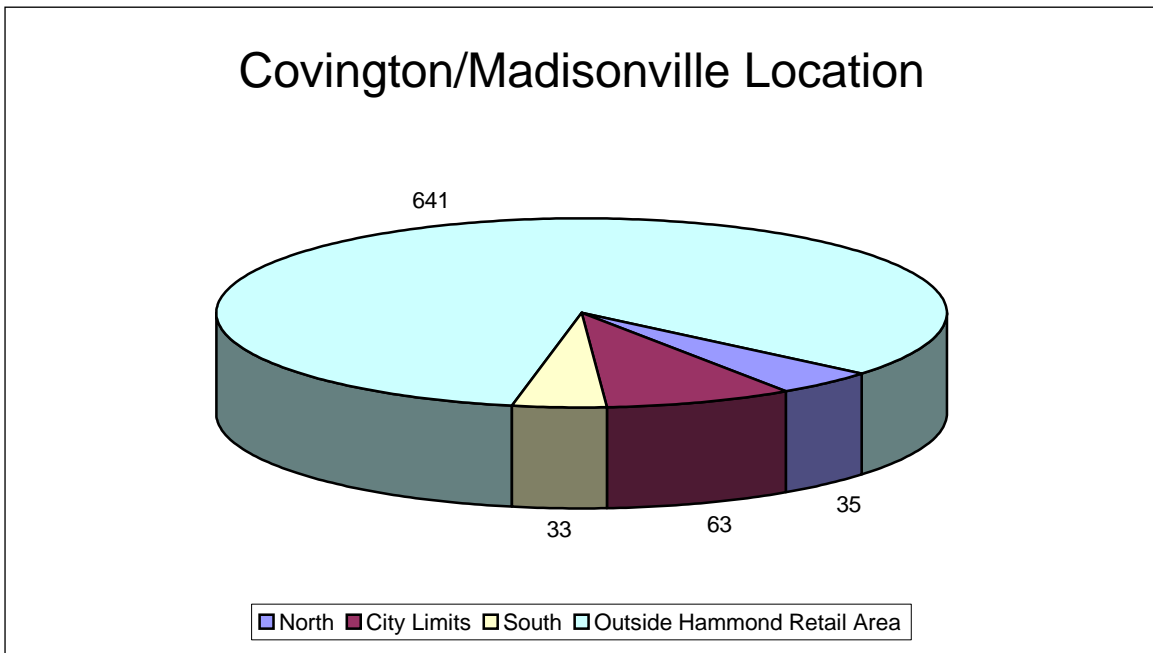
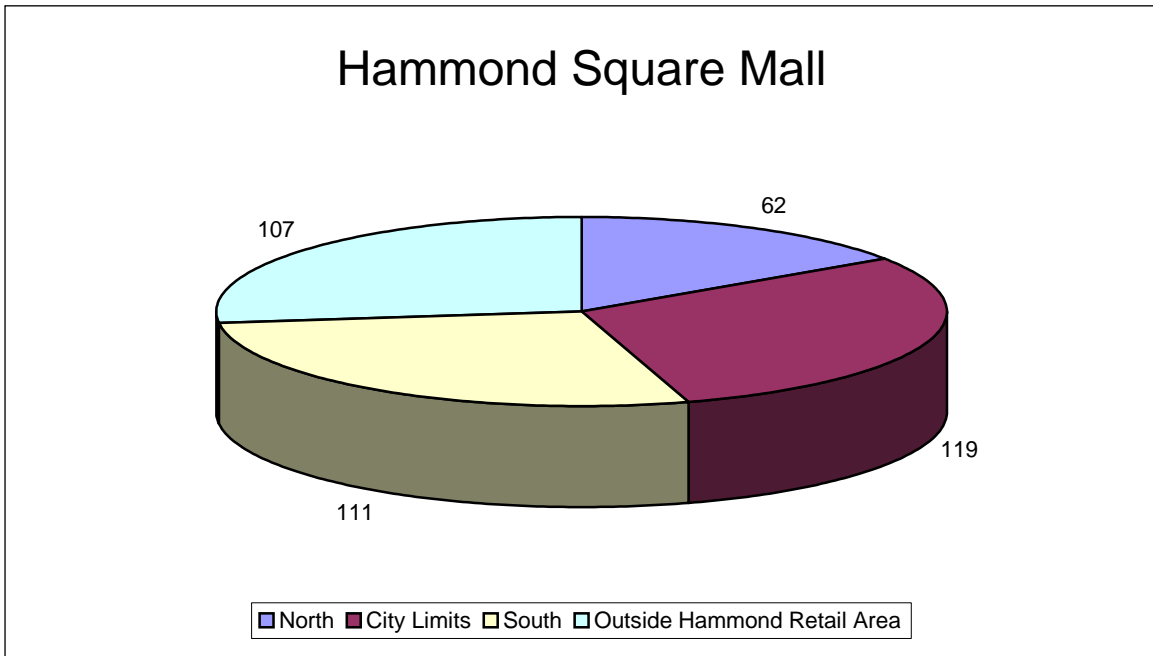


Figure 4: *Continued* – Shoppers Place of Residence



Secondary Analysis of Retail Purchases and Sales

Data used were provided by Claritas, Inc. The volume of retail purchases reported by residents of Hammond are derived from the Consumer Expenditure Survey of the U.S. Bureau of Labor Statistics, and sales data are derived from the Census of Retail Trade reported by the U.S. Census. The reported purchases are used as a measure of demand, and reported sales are used as a measure of the supply of retail sales. Reported sales data by retail establishments within the city were compared to reported retail purchase data in order to determine the surplus or shortage of retail sales, by major sectors.³

Two variables were used in order to measure sales in each major retail sector to customers outside the city. These are; the share of sales to customers residing outside the city, and the surplus in reported sector sales, calculated as the dollar volume of sales by retailers within the city minus the reported sector purchases by city residents. Among the sectors with the smallest share of local sales were motor vehicle and parts dealers, health and personal care stores, general merchandise stores, and gasoline stations. These retail sectors are among those with the greatest “pull” factor -- those with the largest share of sales accounted for by customers from outside the city limits. The sector with the greatest surplus was motor vehicle and parts dealers. In 2006, the total surplus of reported retail sales over reported retail purchases was \$360.2 million. Over one-third of that total was accounted for by motor vehicles and parts dealers. Other retail sectors with a calculated surplus greater than \$30 million included health and personal care stores, gasoline stations, general merchandise stores, and foodservice and dining.

Hammond serves as a retail hub for Tangipahoa Parish, and to a lesser extent, for the surrounding North Shore area, defined as the parishes of Livingston, St. Helena, St. Tammany, Tangipahoa, and Washington. According to retail sales data from Claritas, Inc., nearly two-thirds of retail sales in Hammond in 2005 were to individuals residing outside the city limits of Hammond. Reported retail purchases by residents of Hammond in 2006 were equivalent to only 37.7 percent of the value of sales reported by retail establishments in the city.⁴ This data closely corresponds to the intercept survey data that found only 34.3 percent of shoppers surveyed in Hammond reside within the city limits.

Tangipahoa Parish as a whole had a much smaller retail surplus of \$19.4 million in 2006. This would suggest that relatively few shoppers from outside the parish travel to Tangipahoa Parish to shop, and relatively few residents of the parish shop outside the parish; or that these two sales flows are nearly equal in size. Reported retail purchases by residents of the parish were equivalent to 98.7 percent of reported retail sales within the parish. Those sectors with a calculated surplus of over \$20 million in 2006 were motor vehicle and parts dealers (surplus of \$108.5 million), gasoline stations (surplus of \$101.6 million), and foodservice and drinking places (surplus of \$23.8 million). These are the sectors in which parish retailers serve the greatest volume of non-residents.

³ Sectors were classified according to the North American Industry Classification System (NAICS).

⁴ Purchase data are derived from the Consumer Expenditure Survey of the U.S. Bureau of Labor Statistics, and sales data are derived from the Census of Retail Trade reported by the U.S. Census.

In the majority of sectors in which Hammond retailers have a large calculated surplus, retailers in Tangipahoa Parish as a whole have a smaller calculated surplus. This indicates that, in general, Hammond retailers in these sectors serve both customers within the parish, and customers in a wider area. The notable exception is gasoline stations, in which Tangipahoa Parish retailers have a larger calculated surplus than that for retailers within the city. As the city and parish are located at the intersection of interstate highways 12 and 55, it is not surprising that reported sales by gasoline stations exceed reported purchases from gasoline stations by local residents in both the city and the parish.

For the health and personal care, general merchandise, and foodservice and drinking sectors, the surplus for the parish as a whole is less than half that for retail establishments within the city. This would tend to indicate that the surplus of sales in these sectors primarily serves the parish. In contrast, sales by Hammond retailers in the motor vehicles and parts sector apparently serve a broader region, as the surplus for the parish as a whole is 76.5 percent as large as the surplus for retailers within the city limits.⁵

Table 1: Retail Sectors with Surplus in Hammond in Excess of \$30 Million, 2006

Sector	Hammond		Tangipahoa Parish		North Shore area	
	Surplus	Resident share	Surplus	Resident share	Surplus	Resident share
Total	360.2	37.7%	19.4	98.7%	-1,305.4	121.5%
Motor vehicles/parts	141.9	25.6%	108.5	74.6%	-351.6	128.7%
Health and personal care	30.1	27.6%	19.1	79.6%	-65.3	121.3%
Gasoline stations	34.4	39.7%	101.6	60.6%	67.0	92.0%
General merchandise	42.4	39.0%	19.7	89.8%	279.9	76.2%
Foodservice and drinking	54.0	24.1%	23.8	81.7%	-89.2	117.3%

Surplus is in millions of dollars, and the resident share is the ratio of reported retail purchases by residents to reported retail sales in the city, parish, and area.

Intercept surveys found that approximately one-third of shoppers reside with the city limits of Hammond and that over two-thirds of shoppers in Hammond reside within the 17 zip codes defined as the Hammond Retail Area. Therefore a large share of the shoppers in Hammond live near, but not in, the city limits, and sales to nearby residents who live outside the city limits presumably account for a large share of sales by city retailers. In order to estimate the share of total purchases by nearby residents that are from stores in Hammond, purchases by all Tangipahoa Parish residents were compared to sales by Hammond retailers, by sector.

⁵ However, a comparison of motor vehicles and parts purchases in Hammond and in the parish reveals that purchases by parish residents that live outside the city limits exceed purchases by residents within the city. Therefore, it is possible that the surplus in sales by motor vehicles and parts retailers within the city limits is entirely accounted for by purchases by parish residents. This would mean that there is actually a surplus in the motor vehicles and parts sector by retailers with the parish but outside the city limits.

In every sector except non-store sales, sales by retailers in Hammond in 2006 were equivalent to more than 20 percent of purchases by parish residents, even though the population of Hammond is approximately 16.7 percent that of the parish. The findings are presented in Table 2.

Table 2: Hammond retail sales as a share of Tangipahoa Parish purchases by sector.

Category	Hammond retail sales	Tangipahoa Parish purchases	Share of city sales in parish purchases
Motor vehicles and parts	\$190,779,010	\$318,544,654	59.9%
Furniture and home furnishings	9,267,145	33,995,626	27.3%
Electronics and appliances	6,542,677	31,305,625	20.9%
Building materials, garden equipment	39,839,850	159,367,899	25.0%
Food and beverage stores	36,184,300	171,080,468	21.2%
Health and personal care stores	41,605,118	74,516,414	55.8%
Gasoline stations	57,071,136	156,490,771	36.5%
Clothing and accessories	23,085,466	62,877,468	36.7%
Sporting goods, hobbies, books, music	10,214,796	26,128,869	39.1%
General merchandise (department stores, warehouse clubs, etc.)	69,580,146	174,024,316	40.0%
Miscellaneous retailers (florists, office supplies, stationary, gifts, etc.)	20,612,557	35,427,926	58.2%
Non-store retailers	1,940,034	81,968,996	2.4%
Foodservice and drinking places	71,185,397	106,303,653	67.0%
Total	577,907,632	1,432,032,685	40.4%

Subtracting retail sales volume within the city from retail sales within the parish yields the sales volume by retail establishments in the parish, but outside the city. This is the supply of retail services by businesses in the parish, but outside the city. Purchases by parish residents outside the city are determined by subtracting retail purchases by city residents from retail purchases by parish residents. This is the demand for retail services by parish residents outside the city. An examination of the supply of and demand for retail services by parish residents outside the city finds that there is a shortage in every major sector except gasoline stations. These results reinforce the finding that Hammond serves as a retail hub for the surrounding parish because the surrounding parish does not have sufficient retail services to supply its residents in any sector except gasoline stations.

For example, the largest major retail sector in the parish in 2006 was motor vehicles and parts. Residents of the parish that live outside the city of Hammond reported purchases of motor vehicles and parts totaling \$269,654,309. Motor vehicle and parts dealers in the parish but outside the city reported sales of \$236,219,991. If sales are a measure of supply, and purchases are used as a measure of demand, then there is a shortage of \$33,434,318 in this sector for the parish outside the city of Hammond. Since retailers within the city reported a surplus in this sector (sales in excess of demand), it is reasonable to assume that the shortage in the rest of the parish is largely being supplied by vehicles and parts dealers within Hammond. The supply and demand by sector are summarized in Table 3.

Table 3: Parish Retail Supply and Demand Outside the City of Hammond, by Sector

Category	Retail supply	Retail demand	Shortage (surplus)
Motor vehicles and parts	\$236,219,991	\$269,654,309	\$33,434,318
Furniture and home furnishings	5,742,846	29,131,830	23,388,984
Electronics and appliances	5,870,327	26,193,860	20,323,533
Building materials, garden equipment	81,786,147	138,525,604	56,739,457
Food and beverage stores	62,567,650	145,207,655	82,640,005
Health and personal care stores	52,038,882	63,053,349	11,014,467
Gasoline stations	201,019,863	133,831,126	(67,188,737)
Clothing and accessories	3,659,519	52,274,270	48,614,751
Sporting goods, hobbies, books, music	7,380,183	21,343,344	13,963,161
General merchandise (department stores, warehouse clubs, etc.)	124,158,847	146,868,276	22,709,429
Miscellaneous retailers (florists, office supplies, stationary, gifts, etc.)	24,355,436	30,206,253	5,850,817
Non-store retailers	9,792,971	68,851,429	59,058,458
Foodservice and drinking places	58,936,595	89,154,414	30,217,819
Total	873,529,257	1,214,295,719	340,766,462

The Hammond Retail Area includes 17 zip codes from Walker up to but not including Covington, and from Springfield to Amite (see Figure 1). The residents within the city limits of Hammond account for only approximately 14.1 percent of the population of the Hammond Retail Area, and the residents of Hammond account for only 12.6 percent of the reported consumer retail purchases in the Hammond Retail Area in 2006. Yet, retail establishments within the city limits of Hammond were responsible for 39.2 percent of the retail sales in the Hammond Retail Area over the same period. Retail sales by establishments within the city limits were equivalent to more than half of reported sales of clothing and accessories; sporting goods, hobby and book stores; and foodservice and drinking places in the entire retail area. In every major sector, retailers within the city of Hammond accounted for a larger share of sales in the entire retail area than the city residents' share of purchases in the retail area.

Table 4: City of Hammond Share of Retail Area Purchases and Sales, by Sector, 2006

Retail Sector	Share of purchases by city residents in area purchases	Share of sales by city retailers in area sales
Total Retail Sales Including Eating and Drinking Places	12.6%	39.2%
Motor Vehicle and Parts Dealers-441	12.7%	47.2%
Furniture and Home Furnishings Stores-442	11.8%	36.7%
Electronics and Appliance Stores-443	13.5%	46.3%
Building Material, Garden Equip Stores -444	10.7%	34.2%
Food and Beverage Stores-445	12.5%	33.0%
Health and Personal Care Stores-446	12.8%	43.6%
Gasoline Stations-447	11.9%	21.4%
Clothing and Clothing Accessories Stores-448	14.0%	69.2%
Sporting Goods, Hobby, Book, Music Stores-451	15.3%	62.4%
General Merchandise Stores-452	12.9%	35.0%
Miscellaneous Store Retailers-453	12.1%	44.0%
Non-Store Retailers-454	13.2%	17.0%
Foodservice and Drinking Places-722	13.3%	53.0%

Table 4 presents city of Hammond purchases and retail sales as a share of area purchases and sales. It is also possible to compare sales by retailers within the city limits of Hammond to reported purchases by residents of the entire retail area, by sector. Sales by retailers within the city limits of Hammond accounted for one third of all the reported purchases by residents in the Hammond Retail Area in 2006. Sales by area retailers outside the city accounted for slightly over half of purchases by area residents. The sum of sales reported by retailers in Hammond plus those sales reported by area retailers outside the city is equivalent to only 84.9 percent of the volume of purchases reported by residents within the area. This means that at least 15.1 percent of purchases by area residents were from retailers located outside the area. See Table 8. Actually, of course, the leakage is more than 15.1 percent, as some sales by retailers in Hammond and other area retailers outside the city were actually to customers from outside the retail area.

For instance, in the gasoline stations sector, sales by gasoline stations in Hammond were equivalent to 30.0 percent of all gasoline station purchases by residents of the area, and sales by gasoline stations in the area but outside the city limits were equivalent to 109.8 percent of all gasoline stations purchases by area residents, meaning that at least a dollar volume equivalent to 39.8 percent of area gasoline station purchases was sold by area retailers to customers from outside the area. Actually, the figure is probably much higher than 39.8 percent, as area residents undoubtedly made some gasoline station purchases outside the area.

In some sectors, notably electronics and appliance stores, and clothing and clothing accessory stores, there is a significant shortage of supply in the retail area. For instance, in the electronics appliance store sector, reported sales by retailers within the city limits were equivalent to 17.3 percent of purchases reported by area residents. Sales by other retailers in the area but outside the city limits were equivalent to 20.1 percent of reported purchases. The majority of purchases of electronics and appliances by residents of the Hammond Retail Area in 2006 were from retailers located outside the area.

There is an “opportunity gap” in this sector, but to date retailers in Hammond have not been able to take advantage of this opportunity.

Table 5: Sales by Retailers in Hammond, Sales by Area Retailers outside the City, and Remainder, as a Share of Retail Area Purchases, by Sector, 2006

Retail Sector	Hammond Sales	Other Area Sales	Remainder
Total Retail Sales Including Eating and Drinking Places	33.3%	51.6%	15.1%
Motor Vehicle and Parts Dealers	49.5%	55.5%	-5.0%
Furniture and Home Furnishings Stores	22.4%	38.6%	39.0%
Electronics and Appliance Stores	17.3%	20.1%	62.6%
Building Material, Garden Equip Stores	20.4%	39.2%	40.4%
Food and Beverage Stores	17.5%	35.6%	46.9%
Health and Personal Care Stores	46.6%	60.4%	-7.0%
Gasoline Stations	30.0%	109.8%	-39.8%
Clothing and Clothing Accessories Stores	30.5%	13.6%	55.9%
Sporting Goods, Hobby, Book, Music Stores	32.6%	19.6%	47.8%
General Merchandise Stores	33.1%	61.6%	5.2%
Miscellaneous Store Retailers	47.6%	60.7%	-8.2%
Non-Store Retailers	2.0%	9.6%	88.5%
Foodservice and Drinking Places	55.0%	48.9%	-3.9%

Just as is the case for Tangipahoa Parish outside the city of Hammond, the Hammond Retail Area outside the city of Hammond does not have a sufficient supply of retail services to meet the demands of its residents in any major sector except gasoline stations. The following table presents the shortage of retail demand minus retail sales, by sector, in the Hammond Retail Area outside of the city itself in 2006.

Table 6: Demand, Supply, and Shortage of Retail Sales in the Hammond Retail Area outside the City of Hammond, by Sector, 2006

Retail Sector	Demand	Supply	Shortage
Total Retail Sales Including Eating and Drinking Places	\$1,516,440,231	\$894,975,120	\$621,465,111
Motor Vehicle and Parts Dealers-441	336,469,881	213,777,992	122,691,889
Furniture and Home Furnishings Stores-442	36,497,191	15,960,385	20,536,806
Electronics and Appliance Stores-443	32,678,915	7,589,190	25,089,725
Building Material, Garden Equip Stores -444	174,322,533	76,520,525	97,802,008
Food and Beverage Stores-445	180,383,291	73,400,857	106,982,434
Health and Personal Care Stores-446	77,746,600	53,839,799	23,906,801
Gasoline Stations-447	167,669,736	209,066,545	(41,396,809)
Clothing and Clothing Accessories Stores-448	65,091,202	10,281,088	54,810,114
Sporting Goods, Hobby, Book, Music Stores-451	26,588,235	6,160,054	20,428,181
General Merchandise Stores-452	182,745,622	129,388,173	53,357,449
Miscellaneous Store Retailers-453	38,092,068	26,270,553	11,821,515
Non-Store Retailers-454	85,931,801	9,499,743	76,432,058
Foodservice and Drinking Places-722	112,223,156	63,220,216	49,002,940

In the broader north shore area, reported retail purchases in 2006 were equivalent to 121.5 percent of the value of sales reported by retail establishments in the area. This means that over 20 percent of reported retail purchases by residents in the five-parish area were from establishments outside the area. The north shore area does not include the cities of Baton Rouge and New Orleans.

For three of the five sectors in which Hammond retailers have the greatest calculated surplus; motor vehicles and parts, health and personal care, and foodservice and drinking; the north shore area has a calculated shortage of sales, or “opportunity gap.” Although retailers in Hammond and in Tangipahoa Parish as a whole reported sales in excess of purchases by residents in each of these sectors, purchases by north shore residents from retailers outside the area exceed the Hammond surplus and the Tangipahoa Parish surplus in each sector. This suggests that these are the sectors in which north shore area residents are most willing to travel to a retail hub to do their shopping -- whether a retail hub inside the north shore area, such as Hammond, or a retail hub outside the area. These sectors should offer the greatest opportunity for retailers in Hammond to expand sales to the broader north shore region. Data on retail consumer expenditures, retail sales, and opportunity gap/surplus for the city of Hammond, Tangipahoa Parish, the Hammond Retail Area, and the north shore area for 2006 are contained in Appendices C, D, E, and F.

Although the majority of retail sales in Hammond are to area residents from outside the city, sales by Hammond retailers account for a relatively small share of overall retail sales in the north shore area. Reported retail purchases by residents in the north shore area in 2006 totaled \$7.4 billion. Reported retail sales by establishments in Hammond were equivalent to 7.8 percent of reported total retail purchases in the north shore area; reported retail sales by other establishments in the area were equivalent to 74.5 percent of the total; and retail sales by establishments outside the area accounted for the remaining 17.7 percent of reported retail purchases by north shore area residents.

The surplus of retail sales in Hammond increased in 2006. In 2005, the calculated surplus of retail sales in Hammond was \$321.8 million. In that year, as in the current year, the motor vehicles and parts sector was the largest source of the surplus, with sales in excess of reported purchases by city residents totaling \$111.1 million. In 2005, other major sources of the surplus in retail sales were gasoline stations (\$63.4 million), general merchandise stores (\$55.1 million), and foodservice and drinking places (\$53.6 million).

Retail sales in the city of Hammond as a share of reported north shore area retail purchases also increased slightly in 2006. Reported retail purchases by north shore area residents increased 8.1 percent from \$6.8 billion in 2005 to \$7.4 billion in 2006. Reported retail sales by establishments in Hammond increased by \$59 million in 2006, a growth rate of 10.3 percent. In 2005, reported retail sales by establishments in Hammond were equivalent to 7.6 percent of reported retail purchases by north shore area residents. In 2006, reported retail sales in Hammond were equivalent to 7.8 percent of reported retail purchases by north shore area residents.

The growth in retail sales at other locations within the north shore area has not kept up with area demand. Reported retail sales in the north shore area, outside of Hammond, increased by \$126 million between 2005 and 2006, or by only 2.3 percent, compared to the growth in area purchases of 8.1 percent.

Consequently, the area retail sales shortage increased from 13.7 percent of area sales in 2005 to 17.7 percent of area sales in 2006.

Table 7: Retail Sales Volume and Share of North Shore Area Purchases

Location	Sales Volume	Ratio to North Shore Purchases
2006		
Hammond	578 million	7.8 %
Other North Shore	5,496 million	74.5 %
North Shore Shortage	1,306 million	17.7 %
2005		
Hammond	518 million	7.6 %
Other North Shore	5,368 million	78.7 %
North Shore Shortage	938 million	13.7 %

Other sources of data also indicate that retail sales in the city of Hammond have been increasing rapidly. Sales tax data show that taxable sales in Hammond in 2003 were \$554.0 million. In 2004, taxable sales increased to \$582.4 million. In 2005, taxable sales were \$666.9 million. In the first five months of 2006, taxable sales were \$370.0 million.⁶

Conclusions

There is nearly 2.5 million square feet of existing retail sales space in Hammond. The vast majority of this sales area is in establishments with over 1,000 square feet of sales space. Approximately one third of shoppers in Hammond stores reside within the city limits. Another one third live outside the city limits, but within approximately 20 miles – within the Hammond Retail Area.

Hammond serves as a retail hub for the surrounding parish. The population of Hammond is approximately 16.7 percent of the population of Tangipahoa Parish. However, retail sales by establishments in Hammond in 2006 were equivalent to 40.4 percent of all retail purchases by parish residents. Sales by retail establishments in Hammond were equivalent to over fifty percent of purchases by parish residents in the following sectors: Foodservice and drinking places; motor vehicles and parts dealers; miscellaneous store retailers (such as florists, office supplies, stationary, and gift stores); and health and personal care stores. The largest shortages within the parish are in the sectors of food and beverage stores, building materials and garden equipment stores, and clothing stores. These sectors may provide an opportunity for retailers in the city to expand sales in the parish. The supply of retail services in Tangipahoa Parish but outside the city of Hammond is insufficient to meet the demands of parish residents outside the city in any sector except gasoline stations.

The population of Hammond is only 14.1 percent that of the Hammond Retail Area, yet retailers within the city limits of Hammond accounted for 39.2 percent of the retail sales in the Hammond Retail Area.

⁶ Reported taxable sales include items such as wholesale, services, and rental and leasing; and are not comparable to retail purchase data derived from the Consumer Expenditure Survey and sales data derived from the Census of Retail Trade.

Retailers in the city of Hammond have captured the greatest share of area purchases in the sectors of foodservice and drinking places, motor vehicles and parts, miscellaneous store retailers (such as florists, office supplies, stationary, and gift stores), and health and personal care stores. There are significant shortages within the retail area in the sectors of electronics and appliance stores, and clothing and clothing accessory stores. Shortages in these sectors may provide retailers in the city an opportunity to further expand sales in the Hammond Retail Area.

The population of Hammond is only 3.6 percent of the population of the north shore area, yet sales by Hammond retailers are equivalent to 7.8 percent of retail purchases by north shore residents. For three of the five sectors in which Hammond retailers have the greatest calculated surplus; motor vehicles and parts, health and personal care, and foodservice and drinking; the north shore area has a shortage of sales, indicating that north shore regional demand in these sectors is being supplied from outside the region. Shortages in these sectors may provide retailers in the city of Hammond an opportunity to further expand sales in the north shore area.

Appendix A

Phone Survey Results

Number of Businesses to be Surveyed	1,393
Number of Retail Businesses to Complete Survey	584
Number of Unreachable/Not Retail Businesses	809
Total Square Footage Found	2,482,155

Businesses With

Square Footage Range (Between 0-1000)	64
Square Footage Range (Between 1001-2000)	167
Square Footage Range (Between 2001-3000)	209
Square Footage Range (Between 3001-4000)	26
Square Footage Range (Between 4001-5000)	40
Square Footage Range (Between 5001-6000)	18
Square Footage Range (Between 6001-7000)	5
Square Footage Range (Between 7001-8000)	9
Square Footage Range (Between 8001-9000)	9
Square Footage Range (Between 9001-10000)	7
Square Footage Range (Between 10001and Over)	30

Appendix B

Intercept Sampling Plan

Southeastern Louisiana University College of Business

City of Hammond Retail Re-Development Project Intercept Sampling Plan Results

INTRODUCTION

The purpose of this sampling plan was to identify the proportion of Hammond residents shopping at points in and around the North Shore area. In the study, Hammond shoppers were identified by the zip code in which they reside. Those zip codes include: 70401, 70402, 70403, 70404, 70422, 70442, 70443, 70446, 70451, 70453, 70454, 70455, 70462, 70466, 70711, 70744 and 70754. Particular retail points of interest on the North Shore include: Walker retail site (Wal-Mart), Hammond Retail Area (Mall, Downtown and Wal-Mart/Lowes) and Covington retail site (Target).

PARAMETERS

Parameters for the study included a 95% level of significance, an acceptable error of $\pm 3\%$, and a distribution of consumer shopping patterns on weekends versus weekdays. Prism Business Media (2003) estimates that there are 39.7 % of consumers shopping on weekdays and 60.3% of consumers shopping on weekends, with time-of-day distributions for each.

INTERCEPT PLAN

Sample sizes for particular retail points of interest were calculated as follows:

Walker	<u>Weekday Total: 271</u> 8:00am-Noon: 66 Noon-4:00pm: 120 4:00pm-8:00pm: 85	<u>Weekend Total: 412</u> 8:00am-Noon: 97 Noon-4:00pm: 207 4:00pm-8:00pm: 108
Hammond	<u>Weekday Total: 356</u> 8:00am-Noon: 87 Noon-4:00pm: 157 4:00pm-8:00pm: 112	<u>Weekend Total: 541</u> 8:00am-Noon: 127 Noon-4:00pm: 272 4:00pm-8:00pm: 142
Covington	<u>Weekday Total: 271</u> 8:00am-Noon: 66 Noon-4:00pm: 120 4:00pm-8:00pm: 85	<u>Weekend Total: 412</u> 8:00am-Noon: 97 Noon-4:00pm: 207 4:00pm-8:00pm: 108

LIMITATIONS

Due to the inability to secure permission to perform intercept sampling from Wal-Mart and Lowes, the Walker retail site was abandoned and the sample size for the Hammond Retail Area was significantly reduced. In total, there were 603 data points collected (Downtown, n = 204; Mall, n = 399) within the Hammond Retail Area, and 772 data points collected at the Covington retail site surveyed. Under these new conditions, the acceptable error for the Hammond Retail Area increased to $\pm 4\%$.

RESULTS

Intercept sampling results indicate that approximately 72.47% (Downtown = 71.08%; Mall = 73.18%) of shoppers surveyed in the Hammond Retail Area are Hammond Retail Area residents. In addition, only 16.97% of the shoppers surveyed in the Covington retail site are Hammond Retail Area residents.

REFERENCES

Neter, J., William Wasserman, G.A. Whitmore (1988). Applied Statistics, 3rd edition. Allyn and Bacon, Inc., Boston, Massachusetts.

Prism Business Media (2003). "Traffic Patterns," *Retail Traffic*, July 1 edition. (includes Simmons Market Research Bureau's retail shopping distributions by weekend/weekday and time-of-day)

Appendix C

RMP Opportunity Gap – Retail Stores

City of Hammond, 2006

Retail Stores	Demand (Consumer Expenditures)	Supply (Retail Sales)	Opportunity Gap/Surplus
Total Retail Sales Incl Eating and Drinking Places	217,736,966	577,907,632	(360,170,666)
Motor Vehicle and Parts Dealers-441	48,890,345	190,779,010	(141,888,665)
Automotive Dealers-4411	41,827,021	172,108,819	(130,281,798)
Other Motor Vehicle Dealers-4412	3,363,481	5,026,888	(1,663,407)
Automotive Parts/Accsrs, Tire Stores-4413	3,699,843	13,643,303	(9,943,460)
Furniture and Home Furnishings Stores-442	4,863,796	9,267,145	(4,403,349)
Furniture Stores-4421	2,694,015	5,190,578	(2,496,563)
Home Furnishing Stores-4422	2,169,781	4,076,567	(1,906,786)
Electronics and Appliance Stores-443	5,111,765	6,542,677	(1,430,912)
Appliances, TVs, Electronics Stores-44311	3,811,404	6,187,786	(2,376,382)
Household Appliances Stores-443111	852,458		852,458
Radio, Television, Electronics Stores-443112	2,958,946	6,187,786	(3,228,840)
Computer and Software Stores-44312	1,116,221	354,891	761,330
Camera and Photographic Equipment Stores-44313	184,140		184,140
Building Material, Garden Equip Stores -444	20,842,295	39,839,850	(18,997,555)
Building Material and Supply Dealers-4441	18,934,441	39,667,664	(20,733,223)
Home Centers-44411	7,343,180	22,929,164	(15,585,984)
Paint and Wallpaper Stores-44412	488,559	654,718	(166,159)
Hardware Stores-44413	1,465,705	3,412,572	(1,946,867)
Other Building Materials Dealers-44419	9,636,997	12,671,210	(3,034,213)
Building Materials, Lumberyards-444191	3,181,331	4,321,021	(1,139,690)
Lawn, Garden Equipment, Supplies Stores-4442	1,907,854	172,186	1,735,668
Outdoor Power Equipment Stores-44421	292,235		292,235
Nursery and Garden Centers-44422	1,615,619	172,186	1,443,433
Food and Beverage Stores-445	25,872,813	36,184,300	(10,311,487)
Grocery Stores-4451	23,596,029	33,917,338	(10,321,309)
Supermarkets, Grocery (Ex Conv) Stores-44511	22,413,951	32,577,044	(10,163,093)
Convenience Stores-44512	1,182,078	1,340,294	(158,216)
Specialty Food Stores-4452	796,286	1,733,821	(937,535)
Beer, Wine and Liquor Stores-4453	1,480,498	533,141	947,357
Health and Personal Care Stores-446	11,463,065	41,605,118	(30,142,053)
Pharmancies and Drug Stores-44611	9,983,676	38,585,139	(28,601,463)
Cosmetics, Beauty Supplies, Perfume Stores-44612	422,382	362,239	60,143
Optical Goods Stores-44613	299,205	298,418	787
Other Health and Personal Care Stores-44619	757,802	2,359,322	(1,601,520)

City of Hammond, 2006

Retail Stores	Demand (Consumer Expenditures)	Supply (Retail Sales)	Opportunity Gap/Surplus
Gasoline Stations-447	22,659,645	57,071,136	(34,411,491)
Gasoline Stations With Conv Stores-44711	17,046,637	35,454,652	(18,408,015)
Other Gasoline Stations-44719	5,613,008	21,616,484	(16,003,476)
Clothing and Clothing Accessories Stores-448	10,603,198	23,085,466	(12,482,268)
Clothing Stores-4481	7,917,329	18,737,570	(10,820,241)
Men's Clothing Stores-44811	494,526	5,013	489,513
Women's Clothing Stores-44812	2,086,258	38,621	2,047,637
Childrens, Infants Clothing Stores-44813	448,743	2,215	446,528
Family Clothing Stores-44814	4,183,133	18,691,000	(14,507,867)
Clothing Accessories Stores-44815	163,695	389	163,306
Other Clothing Stores-44819	540,974	332	540,642
Shoe Stores-4482	1,552,548	2,422,079	(869,531)
Jewelry, Luggage, Leather Goods Stores-4483	1,133,321	1,925,817	(792,496)
Jewelry Stores-44831	1,038,385	1,833,854	(795,469)
Luggage and Leather Goods Stores-44832	94,936	91,963	2,973
Sporting Goods, Hobby, Book, Music Stores-451	4,785,525	10,214,796	(5,429,271)
Sportng Goods, Hobby, Musical Inst Stores-4511	2,973,791	4,706,892	(1,733,101)
Sporting Goods Stores-45111	1,602,039	1,551,507	50,532
Hobby, Toys and Games Stores-45112	880,476	2,161,779	(1,281,303)
Sew/Needlework/Piece Goods Stores-45113	217,992	90,223	127,769
Musical Instrument and Supplies Stores-45114	273,284	903,383	(630,099)
Book, Periodical and Music Stores-4512	1,811,734	5,507,904	(3,696,170)
Book Stores and News Dealers-45121	1,383,734	5,187,083	(3,803,349)
Book Stores-451211	1,339,234	5,187,083	(3,847,849)
News Dealers and Newsstands-451212	44,500		44,500
Prerecorded Tapes, CDs, Record Stores-45122	428,000	320,821	107,179
General Merchandise Stores-452	27,156,040	69,580,146	(42,424,106)
Department Stores Excl Leased Depts-4521	12,796,648	40,532,085	(27,735,437)
Other General Merchandise Stores-4529	14,359,392	29,048,061	(14,688,669)
Warehouse Clubs and Super Stores-45291	12,439,018	26,641,969	(14,202,951)
All Other General Merchandise Stores-45299	1,920,374	2,406,092	(485,718)
Miscellaneous Store Retailers-453	5,221,673	20,612,557	(15,390,884)
Florists-4531	367,650	745,900	(378,250)
Office Supplies, Stationery, Gift Stores-4532	2,019,532	9,648,941	(7,629,409)
Office Supplies and Stationery Stores-45321	1,155,590	8,652,122	(7,496,532)
Gift, Novelty and Souvenir Stores-45322	863,942	996,819	(132,877)
Used Merchandise Stores-4533	475,148	979,426	(504,278)
Other Miscellaneous Store Retailers-4539	2,359,343	9,238,290	(6,878,947)

City of Hammond, 2006

Retail Stores	Demand (Consumer Expenditures)	Supply (Retail Sales)	Opportunity Gap/Surplus
Non-Store Retailers-454	13,117,567	1,940,034	11,177,533
Electronic Shopping, Mail-Order Houses-4541	9,576,435	764,785	8,811,650
Vending Machine Operators-4542	545,281	314,001	231,280
Direct Selling Establishments-4543	2,995,851	861,248	2,134,603
Foodservice and Drinking Places-722	17,149,239	71,185,397	(54,036,158)
Full-Service Restaurants-7221	7,642,953	22,300,721	(14,657,768)
Limited-Service Eating Places-7222	7,385,471	35,941,068	(28,555,597)
Special Foodservices-7223	1,480,467	12,119,289	(10,638,822)
Drinking Places -Alcoholic Beverages-7224	640,348	824,319	(183,971)
GAFO *	54,539,856	128,339,171	(73,799,315)
General Merchandise Stores-452	27,156,040	69,580,146	(42,424,106)
Clothing and Clothing Accessories Stores-448	10,603,198	23,085,466	(12,482,268)
Furniture and Home Furnishings Stores-442	4,863,796	9,267,145	(4,403,349)
Electronics and Appliance Stores-443	5,111,765	6,542,677	(1,430,912)
Sporting Goods, Hobby, Book, Music Stores-451	4,785,525	10,214,796	(5,429,271)
Office Supplies, Stationery, Gift Stores-4532	2,019,532	9,648,941	(7,629,409)

Appendix D

RMP Opportunity Gap - Retail Stores

Tangipahoa Parish, 2006

Retail Stores	Demand (Consumer Expenditures)	Supply (Retail Sales)	Opportunity Gap/Surplus
Total Retail Sales Incl Eating and Drinking Places	1,432,032,685	1,451,436,889	(19,404,204)
Motor Vehicle and Parts Dealers-441	318,544,654	426,999,001	(108,454,347)
Automotive Dealers-4411	273,465,296	337,707,010	(64,241,714)
Other Motor Vehicle Dealers-4412	21,450,743	57,228,997	(35,778,254)
Automotive Parts/Accsrs, Tire Stores-4413	23,628,615	32,062,994	(8,434,379)
Furniture and Home Furnishings Stores-442	33,995,626	15,009,991	18,985,635
Furniture Stores-4421	18,520,228	7,889,998	10,630,230
Home Furnishing Stores-4422	15,475,398	7,119,993	8,355,405
Electronics and Appliance Stores-443	31,305,625	12,413,004	18,892,621
Appliances, TVs, Electronics Stores-44311	23,719,144	11,381,007	12,338,137
Household Appliances Stores-443111	5,817,610	2,143,002	3,674,608
Radio, Television, Electronics Stores-443112	17,901,534	9,238,005	8,663,529
Computer and Software Stores-44312	6,417,669	1,031,997	5,385,672
Camera and Photographic Equipment Stores-44313	1,168,812		1,168,812
Building Material, Garden Equip Stores -444	159,367,899	121,625,997	37,741,902
Building Material and Supply Dealers-4441	145,479,086	109,190,996	36,288,090
Home Centers-44411	55,746,347	52,149,004	3,597,343
Paint and Wallpaper Stores-44412	3,597,985	1,421,000	2,176,985
Hardware Stores-44413	10,713,236	8,888,000	1,825,236
Other Building Materials Dealers-44419	75,421,518	46,732,992	28,688,526
Building Materials, Lumberyards-444191	24,866,001	15,936,458	8,929,543
Lawn, Garden Equipment, Supplies Stores-4442	13,888,813	12,435,001	1,453,812
Outdoor Power Equipment Stores-44421	2,214,834		2,214,834
Nursery and Garden Centers-44422	11,673,979	12,435,001	(761,022)
Food and Beverage Stores-445	171,080,468	98,751,950	72,328,518
Grocery Stores-4451	156,994,014	93,351,966	63,642,048
Supermarkets, Grocery (Ex Conv) Stores-44511	149,136,110	87,620,974	61,515,136
Convenience Stores-44512	7,857,904	5,730,992	2,126,912
Specialty Food Stores-4452	5,264,896	4,466,985	797,911
Beer, Wine and Liquor Stores-4453	8,821,558	932,999	7,888,559
Health and Personal Care Stores-446	74,516,414	93,644,000	(19,127,586)
Pharmancies and Drug Stores-44611	64,798,457	88,585,007	(23,786,550)
Cosmetics, Beauty Supplies, Perfume Stores-44612	2,735,268	902,995	1,832,273
Optical Goods Stores-44613	2,083,732	944,000	1,139,732
Other Health and Personal Care Stores-44619	4,898,957	3,211,998	1,686,959

Tangipahoa Parish, 2006

Retail Stores	Demand (Consumer Expenditures)	Supply (Retail Sales)	Opportunity Gap/Surplus
Gasoline Stations-447	156,490,771	258,090,999	(101,600,228)
Gasoline Stations With Conv Stores-44711	117,491,908	180,665,004	(63,173,096)
Other Gasoline Stations-44719	38,998,863	77,425,995	(38,427,132)
Clothing and Clothing Accessories Stores-448	62,877,468	26,744,985	36,132,483
Clothing Stores-4481	46,429,098	18,783,990	27,645,108
Men's Clothing Stores-44811	2,964,410	7,001	2,957,409
Women's Clothing Stores-44812	11,610,746	80,996	11,529,750
Childrens, Infants Clothing Stores-44813	3,002,897	3,000	2,999,897
Family Clothing Stores-44814	24,792,817	18,691,000	6,101,817
Clothing Accessories Stores-44815	968,480	995	967,485
Other Clothing Stores-44819	3,089,748	998	3,088,750
Shoe Stores-4482	9,233,790	3,991,998	5,241,792
Jewelry, Luggage, Leather Goods Stores-4483	7,214,580	3,968,997	3,245,583
Jewelry Stores-44831	6,603,751	3,578,007	3,025,744
Luggage and Leather Goods Stores-44832	610,829	390,990	219,839
Sporting Goods, Hobby, Book, Music Stores-451	26,128,869	17,594,979	8,533,890
Sportng Goods, Hobby, Musical Inst Stores-4511	18,760,549	9,920,987	8,839,562
Sporting Goods Stores-45111	9,795,178	3,500,986	6,294,192
Hobby, Toys and Games Stores-45112	5,946,363	3,566,000	2,380,363
Sew/Needlework/Piece Goods Stores-45113	1,486,005	812,001	674,004
Musical Instrument and Supplies Stores-45114	1,533,003	2,042,000	(508,997)
Book, Periodical and Music Stores-4512	7,368,320	7,673,992	(305,672)
Book Stores and News Dealers-45121	5,150,290	5,670,996	(520,706)
Book Stores-451211	4,881,867	5,670,996	(789,129)
News Dealers and Newsstands-451212	268,423		268,423
Prerecorded Tapes, CDs, Record Stores-45122	2,218,030	2,002,996	215,034
General Merchandise Stores-452	174,024,316	193,738,993	(19,714,677)
Department Stores Excl Leased Depts-4521	80,602,527	64,635,000	15,967,527
Other General Merchandise Stores-4529	93,421,789	129,103,993	(35,682,204)
Warehouse Clubs and Super Stores-45291	80,776,420	119,314,996	(38,538,576)
All Other General Merchandise Stores-45299	12,645,369	9,788,997	2,856,372
Miscellaneous Store Retailers-453	35,427,926	44,967,993	(9,540,067)
Florists-4531	2,559,001	1,936,992	622,009
Office Supplies, Stationery, Gift Stores-4532	13,484,327	13,719,011	(234,684)
Office Supplies and Stationery Stores-45321	7,682,441	11,277,004	(3,594,563)
Gift, Novelty and Souvenir Stores-45322	5,801,886	2,442,007	3,359,879
Used Merchandise Stores-4533	2,897,209	2,100,987	796,222
Other Miscellaneous Store Retailers-4539	16,487,389	27,211,003	(10,723,614)

Tangipahoa Parish, 2006

Retail Stores	Demand (Consumer Expenditures)	Supply (Retail Sales)	Opportunity Gap/Surplus
Non-Store Retailers-454	81,968,996	11,733,005	70,235,991
Electronic Shopping, Mail-Order Houses-4541	57,482,147	4,052,995	53,429,152
Vending Machine Operators-4542	3,590,187	941,999	2,648,188
Direct Selling Establishments-4543	20,896,662	6,738,011	14,158,651
Foodservice and Drinking Places-722	106,303,653	130,121,992	(23,818,339)
Full-Service Restaurants-7221	47,291,664	47,477,999	(186,335)
Limited-Service Eating Places-7222	45,924,476	65,016,985	(19,092,509)
Special Foodservices-7223	9,221,417	15,234,002	(6,012,585)
Drinking Places -Alcoholic Beverages-7224	3,866,096	2,393,006	1,473,090
GAFO *	341,816,231	279,220,963	62,595,268
General Merchandise Stores-452	174,024,316	193,738,993	(19,714,677)
Clothing and Clothing Accessories Stores-448	62,877,468	26,744,985	36,132,483
Furniture and Home Furnishings Stores-442	33,995,626	15,009,991	18,985,635
Electronics and Appliance Stores-443	31,305,625	12,413,004	18,892,621
Sporting Goods, Hobby, Book, Music Stores-451	26,128,869	17,594,979	8,533,890
Office Supplies, Stationery, Gift Stores-4532	13,484,327	13,719,011	(234,684)

Appendix E

RMP Opportunity Gap - Retail Stores

HAMMOND RETAIL AREA, Area ZIP Codes (see notes), Total 2006

Retail Stores	Demand (Consumer Expenditures)	Supply (Retail Sales)	Opportunity Gap/Surplus
Total Retail Sales Incl Eating and Drinking Places	1,734,177,197	1,472,882,752	261,294,445
Motor Vehicle and Parts Dealers-441	385,360,226	404,557,002	(19,196,776)
Automotive Dealers-4411	330,873,059	317,415,998	13,457,061
Other Motor Vehicle Dealers-4412	25,910,970	52,980,588	(27,069,618)
Automotive Parts/Accsrs, Tire Stores-4413	28,576,197	34,160,416	(5,584,219)
Furniture and Home Furnishings Stores-442	41,360,987	25,227,530	16,133,457
Furniture Stores-4421	22,485,939	15,924,304	6,561,635
Home Furnishing Stores-4422	18,875,048	9,303,226	9,571,822
Electronics and Appliance Stores-443	37,790,680	14,131,867	23,658,813
Appliances, TVs, Electronics Stores-44311	28,641,962	13,054,433	15,587,529
Household Appliances Stores-443111	7,045,174	2,199,014	4,846,160
Radio, Television, Electronics Stores-443112	21,596,788	10,855,419	10,741,369
Computer and Software Stores-44312	7,732,295	1,077,434	6,654,861
Camera and Photographic Equipment Stores-44313	1,416,423		1,416,423
Building Material, Garden Equip Stores -444	195,164,828	116,360,375	78,804,453
Building Material and Supply Dealers-4441	178,234,392	111,078,913	67,155,479
Home Centers-44411	68,188,371	49,457,442	18,730,929
Paint and Wallpaper Stores-44412	4,394,881	1,614,917	2,779,964
Hardware Stores-44413	13,067,140	8,765,681	4,301,459
Other Building Materials Dealers-44419	92,584,000	51,240,873	41,343,127
Building Materials, Lumberyards-444191	30,499,119	17,473,687	13,025,432
Lawn, Garden Equipment, Supplies Stores-4442	16,930,436	5,281,462	11,648,974
Outdoor Power Equipment Stores-44421	2,698,119		2,698,119
Nursery and Garden Centers-44422	14,232,317	5,281,462	8,950,855
Food and Beverage Stores-445	206,256,104	109,585,157	96,670,947
Grocery Stores-4451	189,246,593	104,849,199	84,397,394
Supermarkets, Grocery (Ex Conv) Stores-44511	179,703,565	92,200,673	87,502,892
Convenience Stores-44512	9,543,028	12,648,526	(3,105,498)
Specialty Food Stores-4452	6,329,067	3,761,276	2,567,791
Beer, Wine and Liquor Stores-4453	10,680,444	974,682	9,705,762
Health and Personal Care Stores-446	89,209,665	95,444,917	(6,235,252)
Pharmancies and Drug Stores-44611	77,571,169	90,449,948	(12,878,779)
Cosmetics, Beauty Supplies, Perfume Stores-44612	3,267,058	917,595	2,349,463
Optical Goods Stores-44613	2,520,686	902,451	1,618,235
Other Health and Personal Care Stores-44619	5,850,752	3,174,923	2,675,829

HAMMOND RETAIL AREA, Area ZIP Codes (see notes), Total 2006

Retail Stores	Demand (Consumer Expenditures)	Supply (Retail Sales)	Opportunity Gap/Surplus
Gasoline Stations-447	190,329,381	266,137,681	(75,808,300)
Gasoline Stations With Conv Stores-44711	142,922,624	193,983,413	(51,060,789)
Other Gasoline Stations-44719	47,406,757	72,154,268	(24,747,511)
Clothing and Clothing Accessories Stores-448	75,694,400	33,366,554	42,327,846
Clothing Stores-4481	55,867,053	23,469,641	32,397,412
Men's Clothing Stores-44811	3,585,204	719,783	2,865,421
Women's Clothing Stores-44812	13,972,720	870,712	13,102,008
Childrens, Infants Clothing Stores-44813	3,555,275	540,892	3,014,383
Family Clothing Stores-44814	29,861,849	19,544,859	10,316,990
Clothing Accessories Stores-44815	1,169,410	752,349	417,061
Other Clothing Stores-44819	3,722,595	1,041,046	2,681,549
Shoe Stores-4482	11,077,251	4,729,086	6,348,165
Jewelry, Luggage, Leather Goods Stores-4483	8,750,096	5,167,827	3,582,269
Jewelry Stores-44831	8,006,455	4,164,270	3,842,185
Luggage and Leather Goods Stores-44832	743,641	1,003,557	(259,916)
Sporting Goods, Hobby, Book, Music Stores-451	31,373,760	16,374,850	14,998,910
Sportng Goods, Hobby, Musical Inst Stores-4511	22,634,997	8,922,528	13,712,469
Sporting Goods Stores-45111	11,789,370	2,947,493	8,841,877
Hobby, Toys and Games Stores-45112	7,189,058	3,134,135	4,054,923
Sew/Needlework/Piece Goods Stores-45113	1,807,851	798,899	1,008,952
Musical Instrument and Supplies Stores-45114	1,848,718	2,042,001	(193,283)
Book, Periodical and Music Stores-4512	8,738,763	7,452,322	1,286,441
Book Stores and News Dealers-45121	6,070,273	5,681,330	388,943
Book Stores-451211	5,745,373	5,681,330	64,043
News Dealers and Newsstands-451212	324,900		324,900
Prerecorded Tapes, CDs, Record Stores-45122	2,668,490	1,770,992	897,498
General Merchandise Stores-452	209,901,662	198,968,319	10,933,343
Department Stores Excl Leased Depts-4521	97,119,740	67,237,355	29,882,385
Other General Merchandise Stores-4529	112,781,922	131,730,964	(18,949,042)
Warehouse Clubs and Super Stores-45291	97,471,253	121,789,353	(24,318,100)
All Other General Merchandise Stores-45299	15,310,669	9,941,611	5,369,058
Miscellaneous Store Retailers-453	43,313,741	46,883,110	(3,569,369)
Florists-4531	3,103,167	2,252,093	851,074
Office Supplies, Stationery, Gift Stores-4532	16,533,706	13,510,895	3,022,811
Office Supplies and Stationery Stores-45321	9,418,414	11,066,433	(1,648,019)
Gift, Novelty and Souvenir Stores-45322	7,115,292	2,444,462	4,670,830
Used Merchandise Stores-4533	3,514,387	2,176,733	1,337,654
Other Miscellaneous Store Retailers-4539	20,162,481	28,943,389	(8,780,908)

Prepared On:

Tues Jan 23, 2007

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Project Code:

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Prepared For:

Prepared By:

HAMMOND RETAIL AREA, Area ZIP Codes (see notes), Total 2006

Retail Stores	Demand (Consumer Expenditures)	Supply (Retail Sales)	Opportunity Gap/Surplus
Non-Store Retailers-454	99,049,368	11,439,777	87,609,591
Electronic Shopping, Mail-Order Houses-4541	69,355,250	3,842,415	65,512,835
Vending Machine Operators-4542	4,336,339	941,999	3,394,340
Direct Selling Establishments-4543	25,357,779	6,655,363	18,702,416
Foodservice and Drinking Places-722	129,372,395	134,405,613	(5,033,218)
Full-Service Restaurants-7221	57,571,791	47,844,650	9,727,141
Limited-Service Eating Places-7222	55,861,033	68,243,362	(12,382,329)
Special Foodservices-7223	11,212,841	15,172,323	(3,959,482)
Drinking Places -Alcoholic Beverages-7224	4,726,730	3,145,278	1,581,452

Notes: Area Listing

Area Name: HAMMOND RETAIL AREA
Type: List - Area ZIP Codes Reporting Detail: Aggregate

Geography Code	Geography Name	Geography Code	Geography Name
70401	Hammond	70402	Hammond
70403	Hammond	70422	Amite
70442	Husser	70443	Independence
70446	Loranger	70453	Pine Grove
70454	Ponchatoula	70455	Robert
70462	Springfield	70466	Tickfaw
70711	Albany	70744	Holden
70754	Livingston		

Project Information:

Site: 1
Order Number: 964887701
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Appendix F

RMP Opportunity Gap - Retail Stores

North Shore, 2006

Retail Stores	Demand (Consumer Expenditures)	Supply (Retail Sales)	Opportunity Gap/Surplus
Total Retail Sales Incl Eating and Drinking Places	7,379,218,753	6,073,477,875	1,305,740,878
Motor Vehicle and Parts Dealers-441	1,575,243,004	1,223,673,020	351,569,984
Automotive Dealers-4411	1,345,960,934	1,007,972,036	337,988,898
Other Motor Vehicle Dealers-4412	109,616,490	79,513,980	30,102,510
Automotive Parts/Accsrs, Tire Stores-4413	119,665,580	136,187,004	(16,521,424)
Furniture and Home Furnishings Stores-442	188,513,203	134,951,050	53,562,153
Furniture Stores-4421	101,360,877	63,498,049	37,862,828
Home Furnishing Stores-4422	87,152,326	71,453,001	15,699,325
Electronics and Appliance Stores-443	165,256,677	133,471,950	31,784,727
Appliances, TVs, Electronics Stores-44311	125,349,262	119,414,997	5,934,265
Household Appliances Stores-443111	30,472,662	36,843,993	(6,371,331)
Radio, Television, Electronics Stores-443112	94,876,600	82,571,004	12,305,596
Computer and Software Stores-44312	33,474,104	13,867,954	19,606,150
Camera and Photographic Equipment Stores-44313	6,433,311	188,999	6,244,312
Building Material, Garden Equip Stores -444	854,323,691	728,068,028	126,255,663
Building Material and Supply Dealers-4441	779,750,579	667,948,027	111,802,552
Home Centers-44411	299,114,313	325,615,008	(26,500,695)
Paint and Wallpaper Stores-44412	19,724,706	3,345,007	16,379,699
Hardware Stores-44413	56,876,142	22,797,997	34,078,145
Other Building Materials Dealers-44419	404,035,418	316,190,015	87,845,403
Building Materials, Lumberyards-444191	135,278,237	107,824,343	27,453,894
Lawn, Garden Equipment, Supplies Stores-4442	74,573,112	60,120,001	14,453,111
Outdoor Power Equipment Stores-44421	11,681,229	713,996	10,967,233
Nursery and Garden Centers-44422	62,891,883	59,406,005	3,485,878
Food and Beverage Stores-445	867,325,434	502,023,881	365,301,553
Grocery Stores-4451	789,848,270	479,254,963	310,593,307
Supermarkets, Grocery (Ex Conv) Stores-44511	749,979,598	445,777,961	304,201,637
Convenience Stores-44512	39,868,672	33,477,002	6,391,670
Specialty Food Stores-4452	26,382,398	14,996,969	11,385,429
Beer, Wine and Liquor Stores-4453	51,094,766	7,771,949	43,322,817
Health and Personal Care Stores-446	371,106,835	305,828,013	65,278,822
Pharmancies and Drug Stores-44611	321,908,759	284,792,031	37,116,728
Cosmetics, Beauty Supplies, Perfume Stores-44612	13,509,736	5,115,003	8,394,733
Optical Goods Stores-44613	11,573,250	5,629,997	5,943,253
Other Health and Personal Care Stores-44619	24,115,090	10,290,982	13,824,108

North Shore, 2006

Retail Stores	Demand (Consumer Expenditures)	Supply (Retail Sales)	Opportunity Gap/Surplus
Gasoline Stations-447	773,385,619	840,341,977	(66,956,358)
Gasoline Stations With Conv Stores-44711	581,474,619	650,448,981	(68,974,362)
Other Gasoline Stations-44719	191,911,000	189,892,996	2,018,004
Clothing and Clothing Accessories Stores-448	335,230,337	201,043,926	134,186,411
Clothing Stores-4481	243,774,162	147,126,929	96,647,233
Men's Clothing Stores-44811	15,545,020	5,738,984	9,806,036
Women's Clothing Stores-44812	61,441,303	30,301,984	31,139,319
Childrens, Infants Clothing Stores-44813	14,856,582	4,800,993	10,055,589
Family Clothing Stores-44814	130,223,799	87,361,995	42,861,804
Clothing Accessories Stores-44815	5,471,873	2,016,988	3,454,885
Other Clothing Stores-44819	16,235,585	16,905,985	(670,400)
Shoe Stores-4482	46,884,524	28,287,989	18,596,535
Jewelry, Luggage, Leather Goods Stores-4483	44,571,651	25,629,008	18,942,643
Jewelry Stores-44831	40,985,482	24,020,017	16,965,465
Luggage and Leather Goods Stores-44832	3,586,169	1,608,991	1,977,178
Sporting Goods, Hobby, Book, Music Stores-451	132,642,115	77,708,947	54,933,168
Sportng Goods, Hobby, Musical Inst Stores-4511	96,372,306	51,855,963	44,516,343
Sporting Goods Stores-45111	50,066,503	14,489,983	35,576,520
Hobby, Toys and Games Stores-45112	30,876,096	29,082,980	1,793,116
Sew/Needlework/Piece Goods Stores-45113	7,234,177	4,957,996	2,276,181
Musical Instrument and Supplies Stores-45114	8,195,530	3,325,004	4,870,526
Book, Periodical and Music Stores-4512	36,269,809	25,852,984	10,416,825
Book Stores and News Dealers-45121	24,924,287	18,095,986	6,828,301
Book Stores-451211	23,509,772	18,095,986	5,413,786
News Dealers and Newsstands-451212	1,414,515		1,414,515
Prerecorded Tapes, CDs, Record Stores-45122	11,345,522	7,756,998	3,588,524
General Merchandise Stores-452	895,542,011	1,175,424,010	(279,881,999)
Department Stores Excl Leased Depts-4521	418,899,336	336,634,016	82,265,320
Other General Merchandise Stores-4529	476,642,675	838,789,994	(362,147,319)
Warehouse Clubs and Super Stores-45291	410,056,164	782,943,006	(372,886,842)
All Other General Merchandise Stores-45299	66,586,511	55,846,988	10,739,523
Miscellaneous Store Retailers-453	189,199,204	169,977,068	19,222,136
Florists-4531	13,825,858	15,354,002	(1,528,144)
Office Supplies, Stationery, Gift Stores-4532	73,872,129	54,205,014	19,667,115
Office Supplies and Stationery Stores-45321	41,921,802	33,271,009	8,650,793
Gift, Novelty and Souvenir Stores-45322	31,950,327	20,934,005	11,016,322
Used Merchandise Stores-4533	15,566,736	7,703,000	7,863,736
Other Miscellaneous Store Retailers-4539	85,934,481	92,715,052	(6,780,571)

North Shore, 2006

Retail Stores	Demand (Consumer Expenditures)	Supply (Retail Sales)	Opportunity Gap/Surplus
Non-Store Retailers-454	425,437,912	64,115,023	361,322,889
Electronic Shopping, Mail-Order Houses-4541	300,522,052	9,036,000	291,486,052
Vending Machine Operators-4542	18,317,697	4,310,996	14,006,701
Direct Selling Establishments-4543	106,598,163	50,768,027	55,830,136
Foodservice and Drinking Places-722	606,012,711	516,850,982	89,161,729
Full-Service Restaurants-7221	271,916,257	222,467,986	49,448,271
Limited-Service Eating Places-7222	256,735,709	256,593,989	141,720
Special Foodservices-7223	51,552,490	24,757,001	26,795,489
Drinking Places -Alcoholic Beverages-7224	25,808,255	13,032,006	12,776,249