

# HARRISBURG REDEVELOPMENT AUTHORITY

## South Allison Hill EPA Brownfields AWP

Topic Meeting #2: Commerce, Retail, and Housing

April 10, 2018



LANDSCAPE ARCHITECTURE  
PLANNING

STROMBERG / GARRIGAN & ASSOCIATES

Michael Baker International, Inc.  
Sustainable Strategies DC  
Gaito & Associates

## AGENDA

- ▶ 1:00 – 1:10 | Trade Area Overview
- ▶ 1:10 – 1:30 | Existing Conditions
- ▶ 1:30 – 2:30 | Community Input

## What will the market research focus on?

### Identify socioeconomic, industry, and real estate trends

- Comparative analysis of **socioeconomic and demographic trends** in the study area, City, and MSA region
- Retail **gap analysis** of the study area to understand consumer spending and local supply
- Analysis of **real estate trends** (housing, office, retail, and industrial) to understand market performance and demand

### Identify re-use opportunities by understanding market data and collecting local input

- Identification of potential **reuse / reinvestment** opportunities based on collective community visioning and robust public/stakeholder input

## What is the Trade Area?

A trade area is the geographic area from which retail establishments draw most of their customers.

### Trade Area Types:

- **Regional Center/Mall:** Typically has a **15 to 30 minute drive time**. Contains larger stores such as department stores, mass merchant, discount stores, etc.
- **Community Shopping Center:** Typically has a **5 to 10 minute drive time**. Contains discount stores or specialty stores.
- **Neighborhood Shopping Center:** Typically has a **3 to 6 minute drive time**. Contains a supermarket, drug store, and smaller retail.



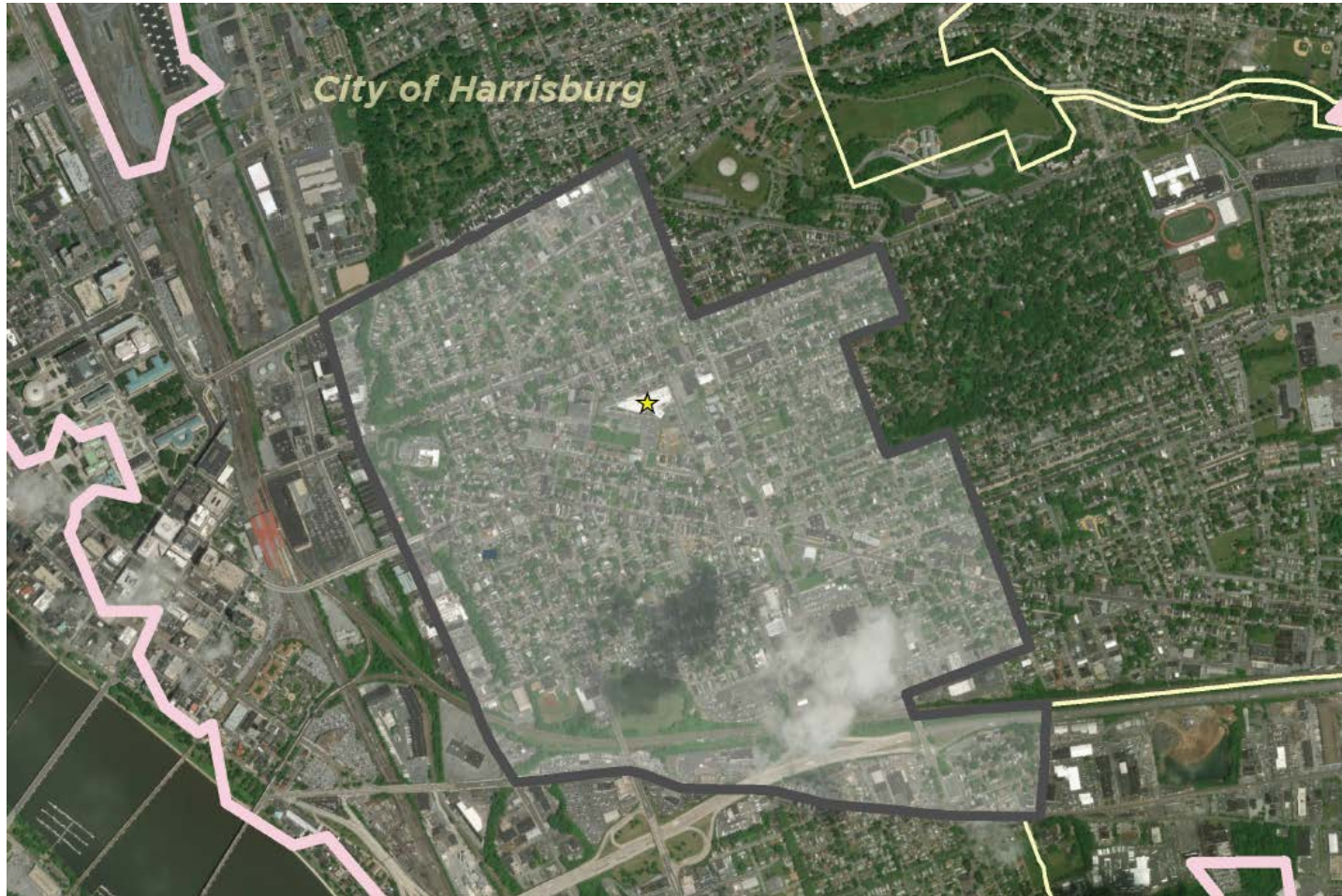
## South Allison Hill Trade Area

- ▶ South Allison Hill is defined as a **Neighborhood Shopping Center**
- ▶ The project area's customer base is largely from a 3-6 minute drive area





## South Allison Hill Trade Area





## Trade Area Demographics

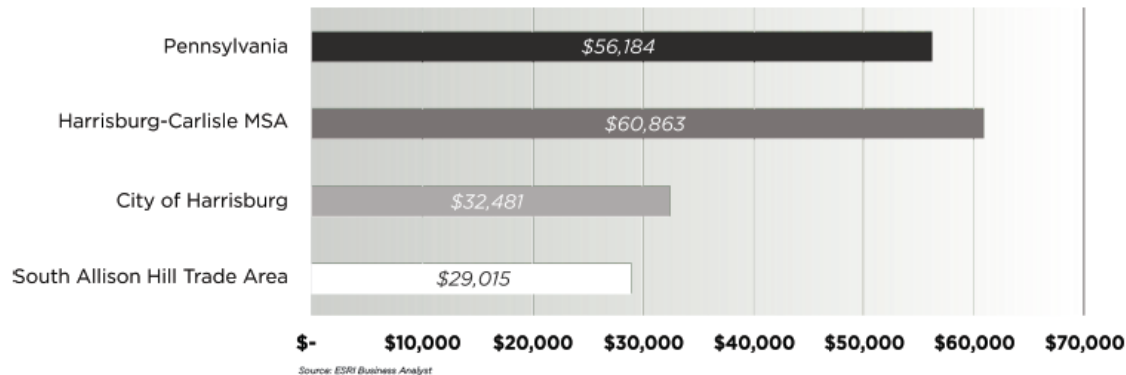
**Population, 2000 - 2022**

	2010	2017
South Allison Hill Trade Area	12,721	12,956
City of Harrisburg	49,528	50,368
Harrisburg-Carlisle MSA	549,475	576,957

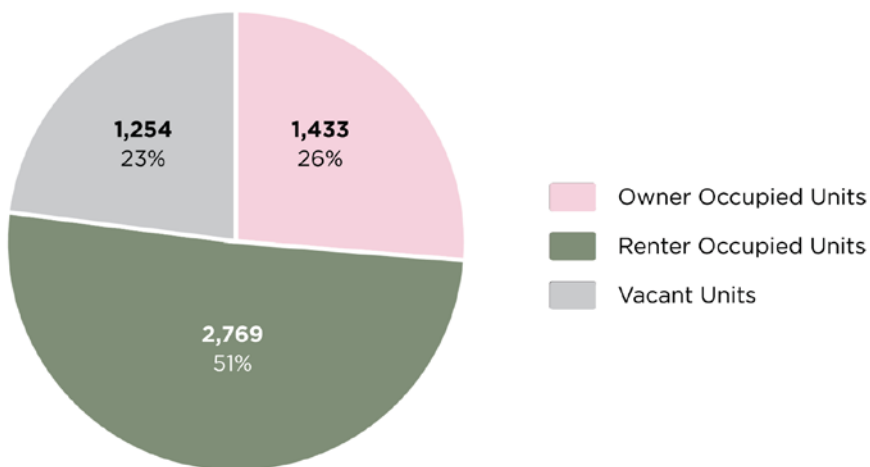
Source: ESRI Business Analyst

- ▶ Approximately 12,956 residents with low growth rates (e.g., about 400 new residents in 12 years)
- ▶ The trade area has an estimated median household income that is 48 percent lower than the PA average
- ▶ The lower estimated household income indicates lower overall purchasing power

**Median Household Income, 2017**



**Housing Unit Summary, 2000 - 2022**



Source: ESRI Business Analyst

## Trade Area Housing Trends

- ▶ Approximately 5,369 housing units are located within the trade area
- ▶ The average home value (owner-occupied) is \$92,715
- ▶ 23% of housing is vacant

**2017 Owner Occupied Housing Units by Value**

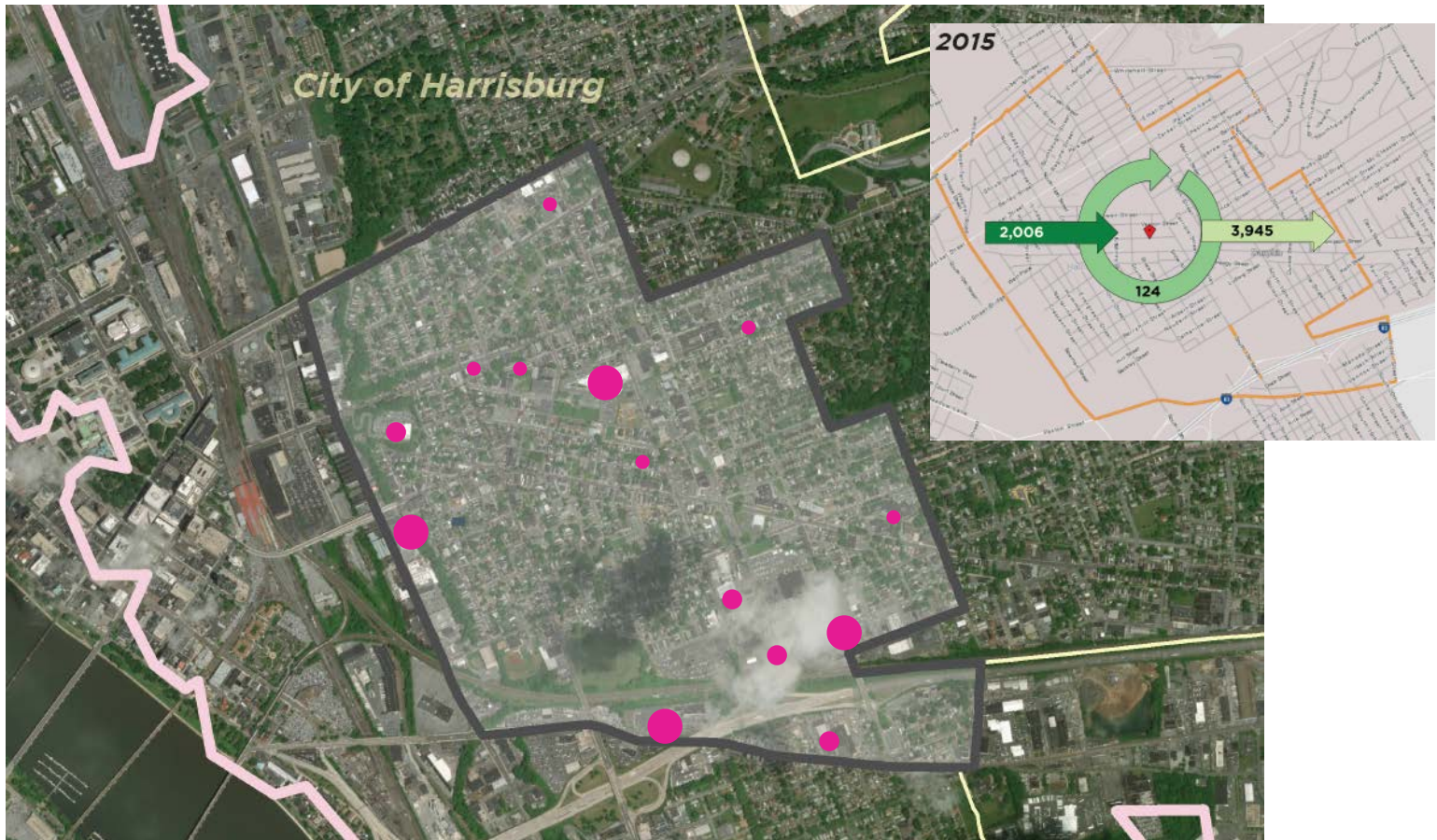
	South Allison Hill Trade Area	City of Harrisburg	Harrisburg-Carlisle MSA
<b>Total Number of Housing Units</b>	<b>1,433</b>	<b>7,581</b>	<b>156,585</b>
<\$50,000	26.6%	11.8%	4.5%
\$50,000 - \$99,999	46.1%	43.1%	9.3%
\$100,000 - \$149,999	9.7%	20.7%	20.0%
\$150,000 - \$199,999	9.1%	13.1%	23.8%
\$200,000 - \$249,999	3.8%	5.9%	14.2%
<b>Average Home Value</b>	<b>\$92,715</b>	<b>\$117,821</b>	<b>\$221,717</b>

Source: ESRI Business Analyst



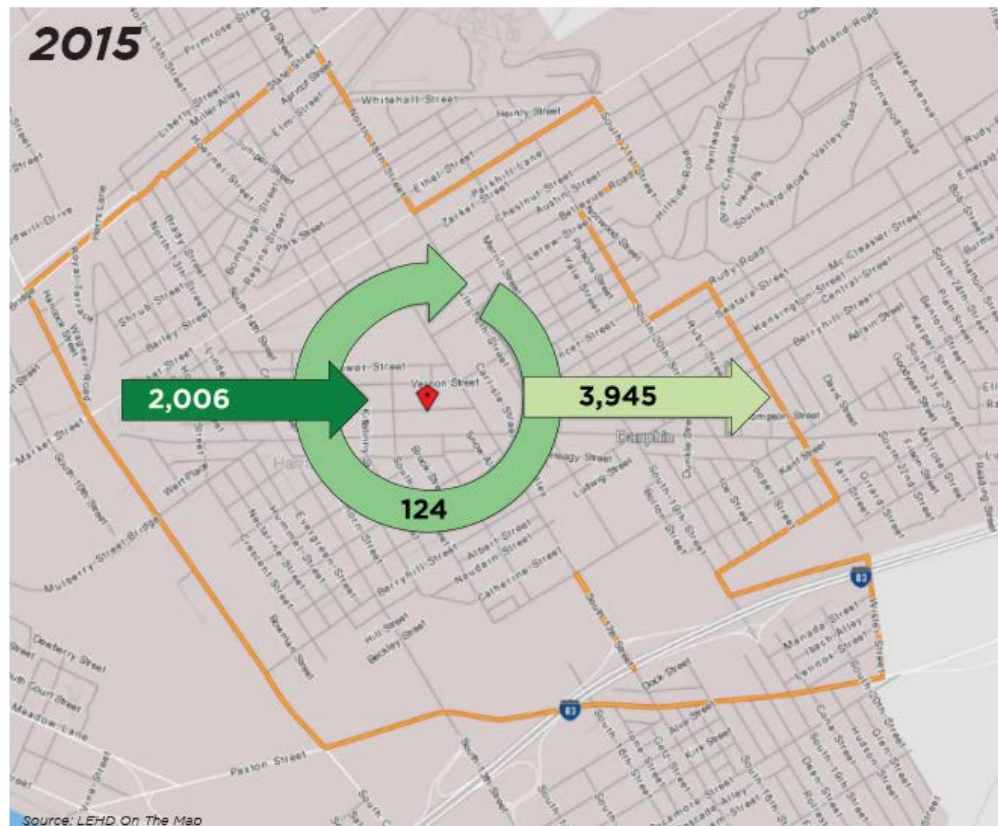
## Trade Area Employment Trends

- ▶ There are **approximately 2,130 primary jobs** located in the area.
- ▶ Manufacturing/good producing jobs and service jobs have both declined (-1,323 since 2005)



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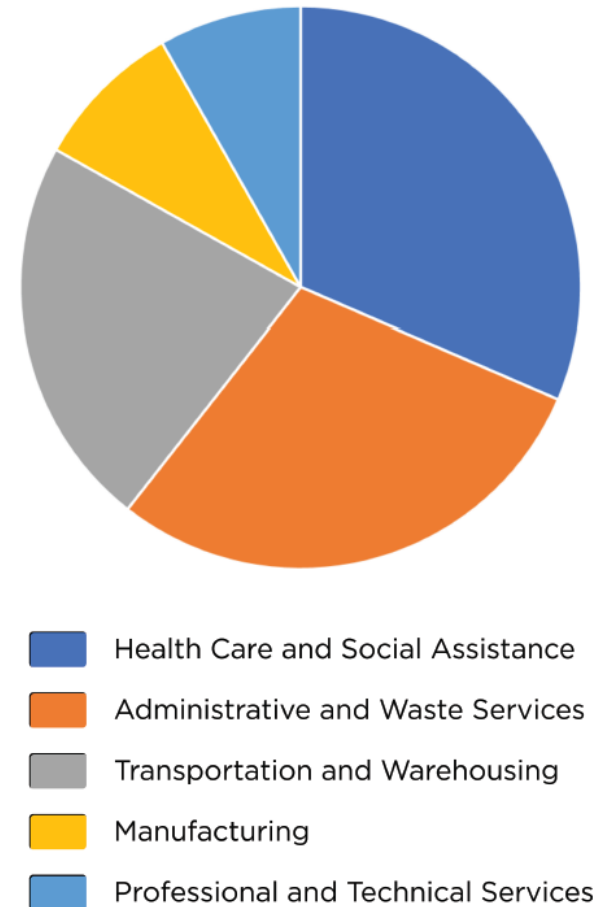
## Trade Area Employment Trends

- ▶ In the trade area, there is a concentration of healthcare and human services organizations
- ▶ There is also manufacturing and light industrial
- ▶ Both healthcare and manufacturing have high growth rates for this region

### *Harrisburg-Carlisle MSA Employment by Industry Trends*

Industry	2001	2005	2010	2015	Change 2010-2015
<b>Total, All Industries</b>	<b>304,221</b>	<b>309,566</b>	<b>303,912</b>	<b>316,000</b>	<b>12,088</b>
Health Care and Social Assistance	37,146	39,180	41,253	46,325	5,072
Administrative and Waste Services	12,640	15,216	15,496	20,184	4,688
Transportation and Warehousing	22,914	22,888	22,459	26,091	3,632
Manufacturing	28,936	25,141	19,989	21,382	1,393
Professional and Technical Services	12,538	14,161	14,256	15,580	1,324
Accommodation and Food Services	19,655	22,123	22,852	24,098	1,246
Other Services, Ex. Public Admin	9,554	10,413	10,312	10,997	685
Real Estate and Rental and Leasing	2,808	3,328	2,821	3,057	236

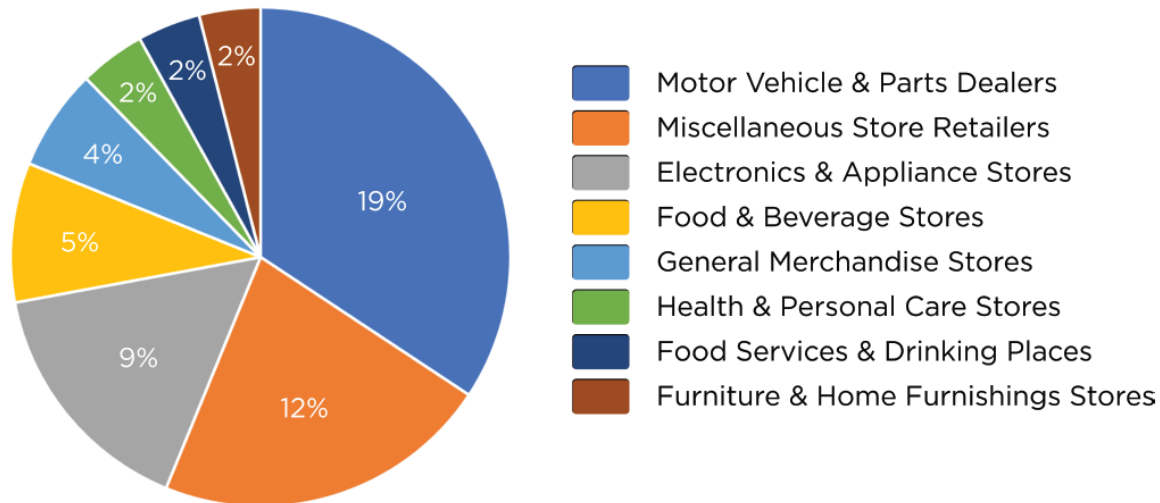
*Harrisburg-Carlisle MSA  
Top 5 Industries for Growth  
2010 - 2015*



## Retail Trends

- ▶ There is an **undersupply** of general merchandise, food & beverage, clothing, restaurants, and building supply stores

*Current Retail Mix by Sales*



Source: LEHD On The Map



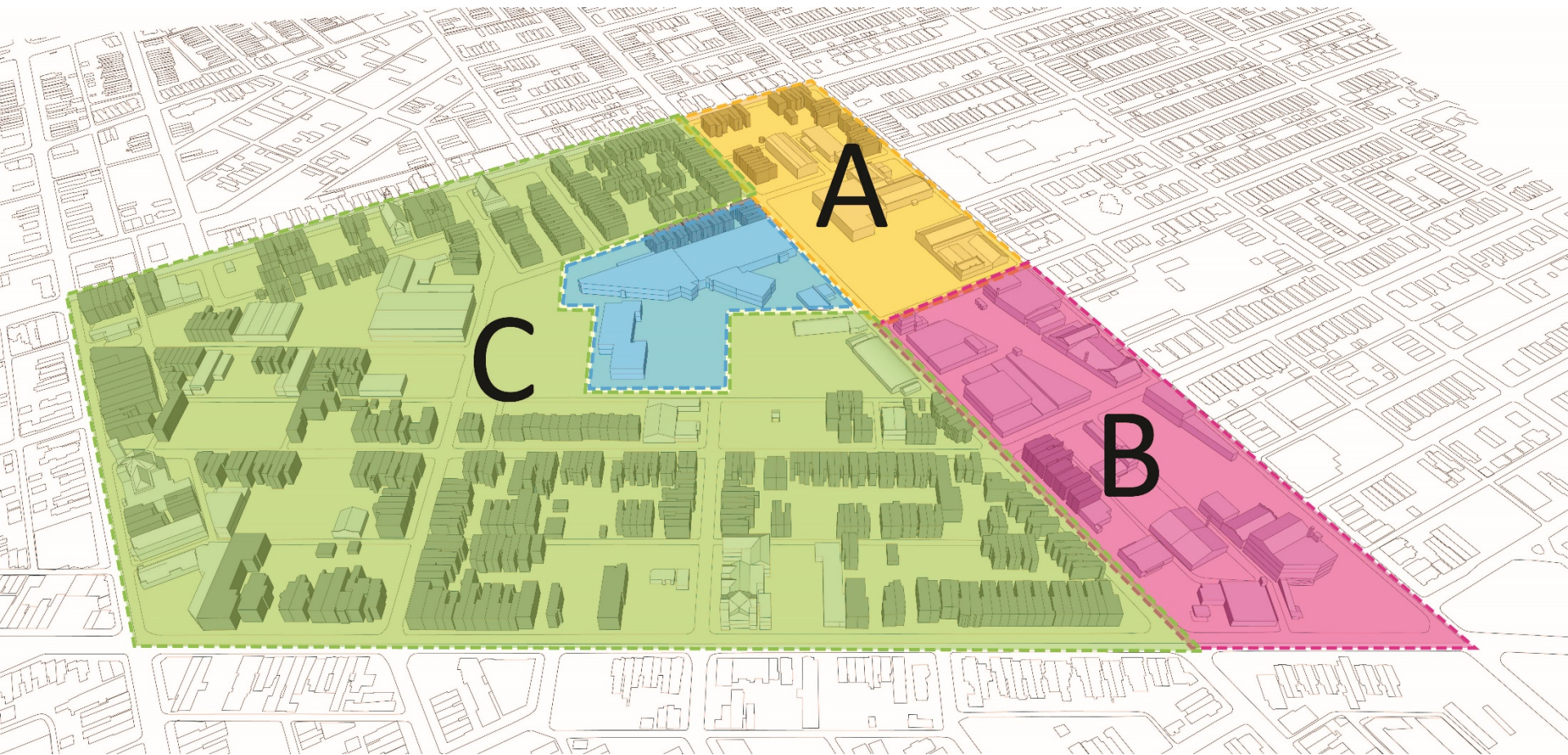
## Retail Trends

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### *South Allison Hill Trade Areas Leakage (Market Opportunity)*

	Demand	Supply	Retail Gap
Department Stores (General Merchandise)	\$8,197,116	\$1,069,164	\$7,127,952
Food & Beverage Stores	\$14,296,330	\$9,433,204	\$4,863,126
Grocery Stores	\$13,037,081	\$9,216,065	\$3,821,016
Clothing & Clothing Accessories Stores	\$4,228,622	\$211,314	\$4,017,308
Restaurants/Other Eating Places	\$7,002,872	\$3,200,066	\$3,802,806
Building Materials, Garden Equipment & Supply Stores	\$3,860,335	\$354,756	\$3,505,579
Sporting Goods, Hobby, Book & Music Stores	\$2,155,841	\$0	\$2,155,841
Beer, Wine & Liquor Stores	\$584,378	\$0	\$584,378
Specialty Food Stores	\$674,871	\$217,139	\$457,732

# //// ENVISIONED OUTCOMES



## it's your turn...

### GROUND RULES:

- ▶ All ideas are welcomed.
- ▶ Please respect everyone's point-of-view – ideas can conflict with each other. That's okay.
- ▶ Be diplomatic and give everyone a chance to speak.
- ▶ Identify a reporter for each table.

## Group Discussion

### Question #1

- ▶ *Today, where do most residents shop for their everyday needs (e.g., groceries, household products, clothing, shoes, restaurants)?*
- ▶ *Is there an existing destination/draw in the neighborhood that attracts visitors?*



## Group Discussion

### Question #2

- ▶ *What services and retail are missing from the neighborhood that could be supported/patronized by local residents?*

## Group Discussion

### Question #3

- ▶ *What types of new employment opportunities would match the skillsets of local workers?*
- ▶ *What types of new industry/businesses would you like to see in your neighborhood?*

## Group Discussion

### Question #4

- ▶ *What types of redevelopment do you want to see?*
- ▶ *Are there specific uses that should remain?*

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**Q & A**



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