UPTOWN AREA
FESTIVAL MALL
FEASIBILITY STUDY

PRESENTED TO

THE MARKET STREET MERCHANTS ASSOCIATION

PRESENTED BY

CENTER FOR URBAN STUDIES

YOUNGSTOWN STATE UNIVERSITY

YOUNGSTOWN, OHIO 44555

(216) 742-3355

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MARKET STREET MERCHANTS ASSOCIATION OFFICERS,

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RESEARCH STAFF

Center for Urban Studies
Youngstown State University

Terry F. Buss, Project Director

Julie A. DeGalan, Project Manager and Report Preparation

George R. Garchar, Project Assistance

Susan Huntley, Telephone Interviewing

Renee Garchar, Telephone Interviewing

Patricia Vuletich, Data Processing

Sam DeAngelis, Graphics

Judith Ferrett, Clerical

Cynthia Hall, Clerical

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INTRODUCTION

The Market Street Merchants Association of Youngstown, Ohio asked The Center for Urban Studies at Youngstown State University to assist them in evaluating the market potential of a festival or specialty mall. This retail center would be located in an empty structure on Market Street in the Uptown area of Youngstown. A Kroger/Super-X store had occupied the building.

What is a festival mall? These specialty retail areas are a fairly new phenomenon. They bring together a group of shops that offer local goods or one-of-a-kind, non-essential items as well as a wide selection of eating establishments. The setting usually includes large, open, airy spaces filled with greenery. Oftentimes entertainment is provided on a regular basis. The emphasis is always on a unique environment, with unusual merchandise and food available.

Locating a festival mall in the Uptown area could be an important step toward contributing to the revitalization there. Some experts believe that one retailing trend for the future will be "the maintained growth of specialty stores at the expense of the department and general merchandise store" (Davies and Rogers, p.27). Other developers are examining "middle markets," or areas between downtown and the suburbs that "were overlooked during the earlier wave of regional suburban development" (Schwartz, p.6). Because of these retailing trends, and the fact that revamping structures such as the one on Market Street has proved successful elsewhere (Kober, p.8), a study that would provide some meaningful information on market potential, consumer desires, and site characteristics, was undertaken.

This project had three purposes. The first was to determine market potential by delineating the primary market area for a festival mall at a given location, deciding on a possible group of retailers to be included, and determining the number of similar stores in the market area to assess market potential.

A second purpose was to survey a group of people to determine whether they would patronize a festival mall. Questions on general shopping patterns and past festival mall shopping were asked of these people, who were considered possible patrons.

Documenting the site and area characteristics was the third purpose. General characteristics for the site, and local population demographics, were examined.

ANALYSIS OF MARKET POTENTIAL

The public relations officers of two festival malls, French Market in Columbus and Station Square in Pittsburgh, were contacted[1] and asked to describe the geographic boundaries of the primary market area for their specialty mall. Both officers indicated that the primary market is contained within a

[1]The people contacted were Mr. David Hayworth at the French Market in Columbus and Joyce at Station Square in Pittsburgh.

five-to-six-mile radius of the mall site. These two malls also draw customers from a larger region, but the repeat customers are considered to be within that five-to-six-mile radius. In addition, two studies support using a primary market area of this size. One study of several specialty shopping centers in California showed that the average driving time to those centers ranged from 15 to 23 minutes (Gruen, p.3). The results of a second survey, of shoppers in the Youngstown-Warren area, indicated that they were willing to travel, on the average, from 1.5 to 6.5 miles for selected items. Given this information, a six-mile radius from the Market Street location was used to define a geographic primary market area for the proposed festival mall. If a retail center of this type cannot be supported by local consumers, it seems unreasonable to expect that shoppers and tourists from outside the primary market area will do so.

Map 1 shows the six-mile radius primary market area used in this study. The straight lines delineate census tracts, township boundaries, and county lines.[2]

Several festival malls in Ohio were visited to determine the kinds of retailers that are commonly found in this type of mall.

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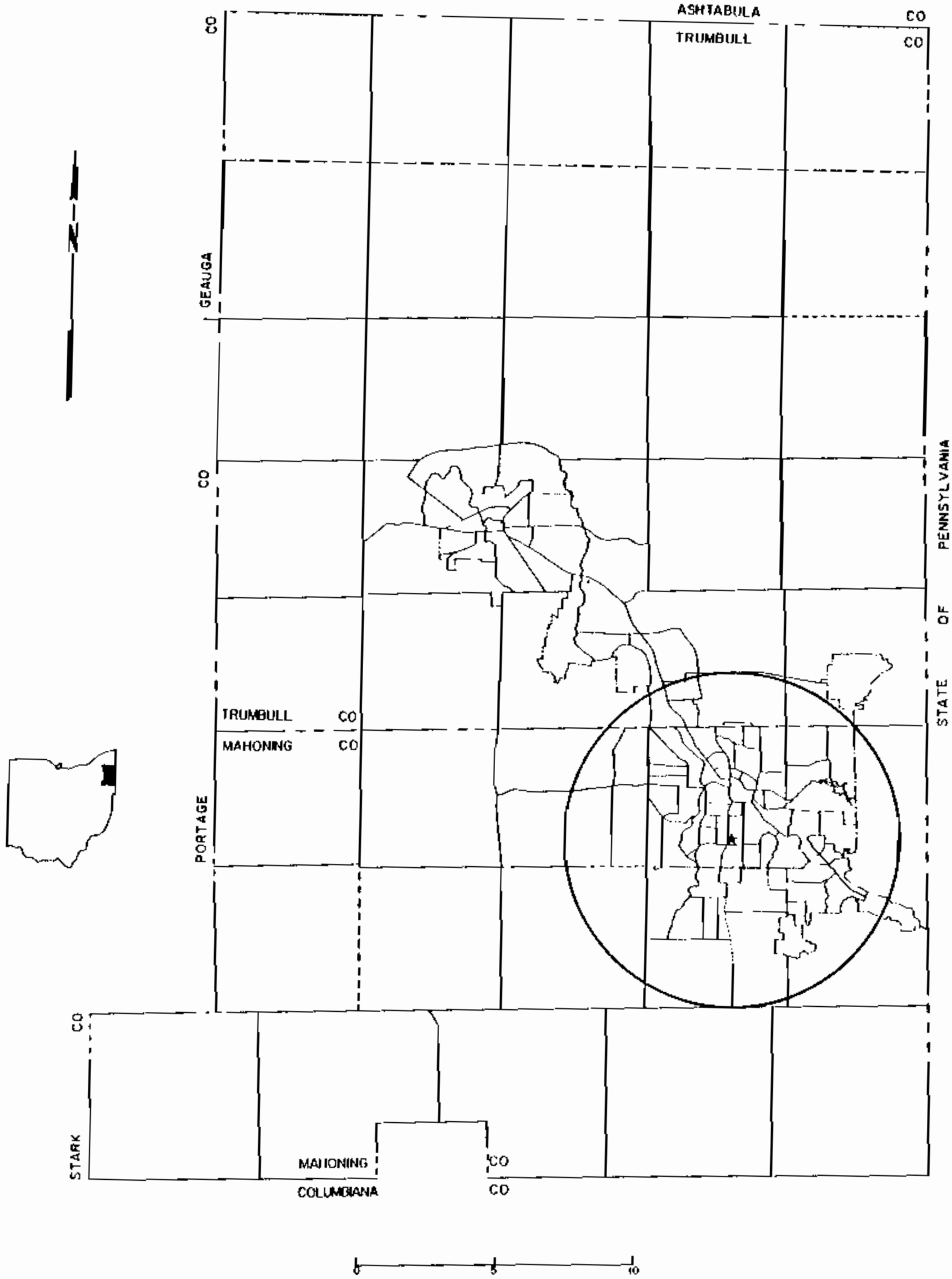
[2]If part of a census tract was located within the primary market boundary line, the street locations were examined, and if a majority of streets were determined to be included in the area, figures for the entire census tract were used.



MAP 1. Festival Mall Site and Primary Market Area

Quaker Square in Akron, the French Market in Columbus, and the Arcade Square in Dayton were included. Shops common to at least two of these specialty malls were identified. These retail establishments included a candy store, gift shop, bakery, card shop, clothing store, florist, specialty grocer, fast food eating establishment, restaurant, bar, arcade, bank branch, art gallery, photo developer, bath and bedroom shop, antique store, and a jewelry store.

Initially, the potential number of retail stores that an area might accommodate was determined by calculating the threshold population, that is, the average number of customers it takes to support a given retailer. Using 1977 and 1982 Census of Retail Trade figures, a sample of six of the retailers listed above was examined for the trade area (see Appendix A for explanation). Table 1 shows the standard industrial code (SIC), type of establishment, and threshold population for these six retailers.

Table 1. Threshold Populations for Selected Retail Establishments

SIC Code	Type of Establishment*	Threshold Population
544	Candy, nut, confectionary	24,484
5463	Retail bakery	9,772
5812	Eating place	852
5813	Drinking place	2,173
5947	Gift, novelty, souvenir	6,213
5992	Florist	7,551

Statistics show that it takes fewer people to support an eating place than it does to support a candy store. In other words, there can be more eating places than candy stores in this geographic area.

The second step was to identify the number of existing retailers of the same type which are currently operating within the primary market area. By dividing the threshold population for a given retailer into the total population of the market area, the potential number of retailers of this type which can be supported by the population was calculated. The potential number can then be compared to the actual number to determine if there may be room in the primary market area for another retailer of this type (see Table 2).

Table 2. Actual* and Potential Number of Selected Retail Establishments

Establishment	Actual Number	Potential Number
Candy, nut, confectionary	17	10
Retail bakery	27	26
Eating place	263	295
Drinking place	161	116
Gift, novelty, souvenir	75	40
Florist	56	33

*Establishments listed in the Ohio Bell Youngstown Vicinity Yellow Pages and located within roughly a six mile radius of the selected site were used for this analysis.

It appears that, using this method, the market in this geographic area is saturated with candy stores, gift shops, retail bakeries, florists, and drinking places. One possibility for additional retailers is eating places. Approximately 32 more establishments might be supported by the population.

It should be noted that, although the threshold analysis was not encouraging, the methodology has been found to yield invalid conclusions on occasion. This being the case, an alternative method for analyzing the market potential was utilized.

One indicator of the success a retailer might have in a given geographic area is the mean household income for the area. That figure reflects, in part, the disposable income a household may spend on non-essential retail items. The higher the income, the more money available for these kinds of goods.

Table 3 shows the number of households, the mean income (in 1980 dollars), the number of households with an income of $20,000 or more, and the percent of total households with this income level within a given radius of the proposed market. Households with an income of $20,000 or more were examined because they were thought to represent, at least in part, the kinds of households that would patronize a specialty mall. "The specialty center must attract customers who are willing and able to buy things they merely want but do not need" (Gruen, p. 4). Table 3 shows that, when comparing income for a two-mile radius to income for a six-mile radius from the proposed site, the mean income level increases, as does the percent of households having an income level of $20,000 or more. Households with higher incomes, then, are not found in the immediate vicinity of the proposed site, but on the outskirts of the primary market area. For some shoppers in the outskirts, there are not any direct transportation routes to the Market Street site, making a longer-than-average[9] drive necessary.

Table 3. Mean Income and Households Earning $20,000 or More (in 1980 Dollars)

Mile Radius	Number of Households	Mean Income	Households With Income of $20,000 or More N	%
2	16,625	$16,363	5,159	31.0
3	31,817	17,014	9,681	30.4
4	51,444	17,917	18,105	35.2
5	71,639	17,325	27,192	38.0
6	90,743	18,345	36,539	40.3

If the retailers in a festival or specialty mall compete directly with retailers of the same type in this primary market area, the outlook for the retailers examined above is rather bleak: supply would greatly exceed demand in the market area.

[9]The California survey results discussed earlier gave a driving time of 15-23 minutes, and the Youngstown survey results showed average distances shoppers were willing to travel for certain items ranged from 1.5 to 6.5 miles.

But planners of specialty malls, and retailers located in them, believe that their market is different from that of individual retailers or regional shopping centers.

> The most obvious difference between the specialty center and what has become the classic regional center is that the former does not contain the proverbial two or more department stores which work as anchor tenants to draw customers. The magnetism of a successful specialty center is generated by the personality of the complex as a whole. In order to create this magnetism, the key characteristics of tenant mix, scale, design, location, promotion and type of consumer must blend and reinforce each other so that the gestalt or the whole which is formed is equal to more than the sum of its parts (Gruen, p.3).

Festival mall retailers appear not to be direct competitors with similar retailers in regional shopping malls. Because of this, the market analysis presented above might better be considered a worse case scenario rather than a complete picture of the market potential for these kinds of shops. The mean household income figures, and the number of households earning $20,000 or more, provides additional information needed to evaluate this project. In addition, an examination of the shopping patterns of potential customers of a specialty mall will add to the understanding of market potential.

SURVEY OF POTENTIAL CUSTOMERS

Specialty malls have a "unique market appeal, which is based on a restaurant/entertainment draw" (Stewart,p.110). Restaurants, rather than department stores, are the anchor tenants. Unique "architectural design and natural settings" add to the atmosphere, where shopping is "a secondary reason to attend and typically only adds to the specialty center's ambience and length of stay" (Stewart, p.110). Another researcher looked at this emphasis on food in terms of design. "A major characteristic of those specialty centers developed to date is that a much greater percentage of gross leasable area is devoted to food service" (Spink, p. 208-209). Consumers' willingness to participate in, and their past history of, shopping at this kind of retail center was explored.

Because "goods offered for sale in the festival market are intended for shoppers at the upper-end of the spectrum" (Martin, p.3), households in three places within the primary market area with relatively high mean incomes were included in a random phone survey of 225 shoppers in the Youngstown-Warren area. These places included Boardman Township, Austintown, and part of Liberty Township--three sides of the market area with significant potential consumer populations. Seventy-five households from each place were contacted by telephone by Center for Urban Studies interviewers.

Table 4. Mean Household Income, Selected Places

Area	Number of Households	Mean Income
Austintown	11,846	$21,839
Boardman Township	15,444	23,096
Liberty, tract 9319	2,586	30,414

Survey respondents were asked how often the adults in their household went shopping for items other than groceries. Over two thirds (68.4%) of them shopped at least once a week, and almost everyone (96.4%) said they purchased something when they shopped.

Almost half (44.1%) of the people indicated that, during their shopping trips, they also enjoyed looking around and people-watching. One drawing power of festival malls is that walking around or window shopping is often "viewed by some as entertainment in and of itself" (Martin, p.4), often resulting in the purchase of food or a small item.

Shoppers were then asked about their knowledge of, visits to, and purchases at, other festival malls. Table 5 shows the responses to these questions for six festival malls. In general, the closer the mall was to the Youngstown-Warren area, the more likely it was that the respondent had been there.

Table 5. Knowledge and Use of Other Festival Malls*

Festival Mall	Heard Of Mall		Visited Mall		Made a Purchase	
	N	%	N	%	N	%
Quaker Square, Akron	162	72.0	104	46.2	80	35.6
French Market, Columbus	105	46.7	66	29.3	55	24.4
Arcade Square, Dayton	13	5.8	7	3.1	6	2.7
Arcade, Cleveland	51	22.7	24	10.7	13	5.8
Station Square, Pittsburgh	105	46.7	67	29.8	45	20.0
Union Terminal, Cincinnati	11	4.9	8	3.6	4	1.8

*Percentages were figured by dividing the number of 'Yes' responses by the total number of people surveyed, 225.

The majority of people who visited one of the markets made some kind of purchase: 80% for Akron, 83% for Columbus, 86% for Dayton, 54% for Cleveland, 67% for Pittsburgh, and 50% for Cincinnati. When asked what they bought, in many cases lunch (23%), miscellaneous food (21%) or baked goods/pastries (5%) were mentioned, for a total of 49% food-related responses. Shoppers in this survey, then, were typical of other festival mall shoppers in that food was an important part of their shopping experience. In addition to food items, people indicated that they bought small items (31%), gifts (11%), or clothing (9%).

Current purchases of certain items often found in specialty malls were gauged in a series of questions. Respondents were asked whether adults in their household visited certain kinds of stores, where these stores were located, and the distance these stores were from their house. The types of retailers included candy, gift or craft, bakery, card, florist, specialty grocer, fast food, bar or restaurant, bath/bed, and antique/art. Table 6 summarizes the responses to these questions. The majority of the stores patronized are located in the Southern Park Mall, Boardman Plaza, the K-Mart on Mahoning Avenue, the Austintown Plaza, the Eastwood Mall, or the Liberty Plaza.

Table 6. Visits To and Distances From Selected Retailers

Retailer	Respondents Indicating a Visit N	%	Average Distance Traveled (Miles)
Candy store	128	56.9	2.4
Gift, craft shop	129	57.3	4.1
Bakery	97	43.1	3.3
Card shop	155	68.9	2.4
Flower shop	102	45.3	2.2
Specialty grocer	47	20.9	6.0
Fast food	165	73.3	1.4
Bar or restaurant	144	64.0	1.9
Bath, bed	13	5.8	6.5
Antique, art	13	5.8	24.8

Mapping the average distance respondents said they were willing to travel for certain items, based on the selected Market Street site, allows for a visual analysis of the areas from which a Market Street festival mall might attract customers for certain goods. Map 2 shows these distances.

Survey respondents were asked if the adults in their household currently go to the Uptown area. Approximately one-fourth said they did; most of these shoppers go to Stambaughs or Kolesars, or attend the movies. Generally, these people said they go there about once a month. Respondents who shopped in the Uptown were asked if they experienced any inconveniences, and one fifth said they did; lack of parking was mentioned most often. When those people who didn't shop in the Uptown were asked why, the majority (44.1%) said there wasn't anything there or they had no reason to go there. Some people (12.1%) indicated it wasn't a safe area, or it was inconvenient to shop there (9.7%).

Each person was asked what changes could be made to the Uptown area to make it more attractive to shoppers. Most (24.0%) responded that the area should be cleaned up, fixed up, or renovated. Fewer people (19.9%) said that security should be improved, parking should be improved (18.5%), and more stores should be added (17.1%).

When asked directly if they would shop at a festival market in the Uptown area if one was located there, almost half (48.9%) said they would, and one fourth said it would depend on the merchandise offered. On the average, people thought they would shop there once or twice a month, and would want to be able to purchase clothing, gifts, food items, household furnishings, shoes, and other miscellaneous goods. Those respondents who said they wouldn't shop there thought it was too far or not a safe area.

Additional information is available on perceptions of safety in the Uptown area. In the Fall of 1984, 600 Mahoning County residents participated in a public opinion survey concerning crime in the county. Respondents were asked if there were some parts of the Youngstown area where they would like to go during the day but were afraid to because of crime. The two most common responses were downtown and the southside (Garchar, p.11). So, perceptions of the crime level in the area of the site are not positive.

Previous festival mall shopping trips were examined for those people who said they would shop at a specialty center in the

Uptown area (see Table 7). Over half (63.1%) of the respondents had been to other specialty malls, and 54.2 percent of this group said they would shop at a similar retail center in the Uptown. Looking at the figures for those who had made a purchase (52.4 % of all respondents), 55.1 percent of this group said they would like to shop at a festival mall in the Uptown. It seems likely that these people would visit, and purchase items at, a specialty mall in the Youngstown-Warren area.

Table 7. Willingness to Shop in Uptown Compared to Previous Shopping Patterns

	Would Shop at Uptown Specialty Mall					
	Yes		No		Maybe	
Response	N	%	N	%	N	%
Been There (142)	77	54.2	30	21.1	35	24.6
Made a Purchase (118)	65	55.1	24	20.3	29	24.6

SITE LOCATION AND SURROUNDING AREA CHARACTERISTICS

The Market Street Merchants Association would like to see a specialty or festival mall placed in an empty structure that previously housed a Kroger/Super-X store. The site is located on Market Street, between Princeton and LaClede, in the south-central part of Youngstown. The area surrounding the site is known as the Uptown.

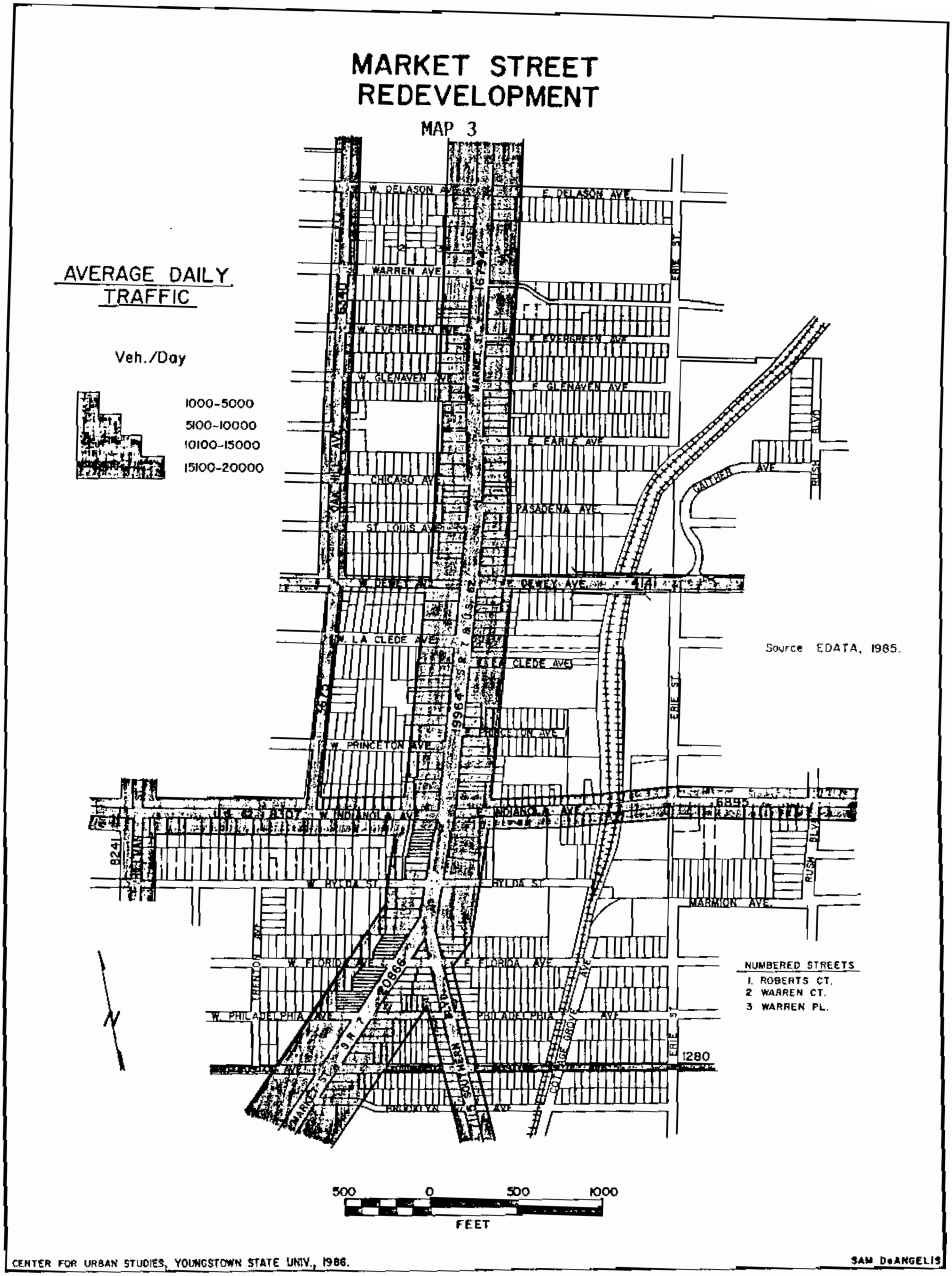
Some general characteristics of the area, as well as some local population characteristics, were explored. General characteristics include traffic patterns, structural conditions, zoning, parking, and land use. Population characteristics include mean household income, education levels, employment status, poverty levels, and occupation categories.

Market Street carries a high volume of traffic--19,964 vehicles per day (EDATA, 1985) past the site. An intersecting street one block south of the location, Indianola Avenue, carries 8,307 vehicles per day (see Map 3).

Structural conditions of buildings in the area surrounding the site are mostly sound, with only a few structures needing minor repairs. The building to be used for the festival mall was inspected by representatives from Mosure and Associates, Inc., a local engineering and architectural firm. According to their assessment, the building is well suited for retail activity of this type (see Map 4).

Zoning, parking, and land use were also examined. Zoning in the Uptown area basically falls into two categories, residential and business, with the business zone running on each side of Market Street and Indianola Avenue. Parking is available at the site (140 spaces), as well as on the street. Accessory parking for area retailers and offices is also available. As for land use in the Uptown, it is varied and includes residential, retail, warehouse, office, industry, vacant, and public and semi-public categories (see Maps 5, 6, and 7).

The site or area characteristics appear to be conducive to the location of a festival market there. Traffic flow past the site is heavy; structurally, the building seems to be a good candidate for this type of retail activity; zoning would not need


MARKET STREET
REDEVELOPMENT
MAP 3
AVERAGE DAILY TRAFFIC
Veh./Day
1000-5000
5100-10000
10100-15000
15100-20000
Source EDATA, 1985.
NUMBERED STREETS
1. ROBERTS CT.
2 WARREN CT.
3 WARREN PL.
W. DELASON AVE.
E. DELASON AVE.
WARREN AVE
W. EVERGREEN AVE
E. EVERGREEN AVE
W. GLENAVEN AVE
E. GLENAVEN AVE
E. EARLE AVE
CHICAGO AVE
PASADENA AVE
ST. LOUIS AVE
W. DEWEY AVE
E. DEWEY AVE.
W. LA CLEDE AVE
LA CLEDE AVE
W. PRINCETON AVE
PRINCETON AVE
W. INDIANOLA AVE
E. INDIANOLA AVE
W. RYDA ST.
RYDA ST.
MARMION AVE.
W. FLORIDA AVE
E. FLORIDA AVE
W. PHILADELPHIA AVE
PHILADELPHIA AVE
BROOKLYN AVE
ERIE ST.
RUSH BLVD.
GAITHER AVE
OAK HILL AVE
MARKET ST.
SOUTHERN BLVD.
COTTAGE GROVE AVE
S.R. 7
S.R. 7 & U.S. 62
6179
8240
4141
6895
8107
8241
19964
20866
1280
500
0
500
1000
FEET
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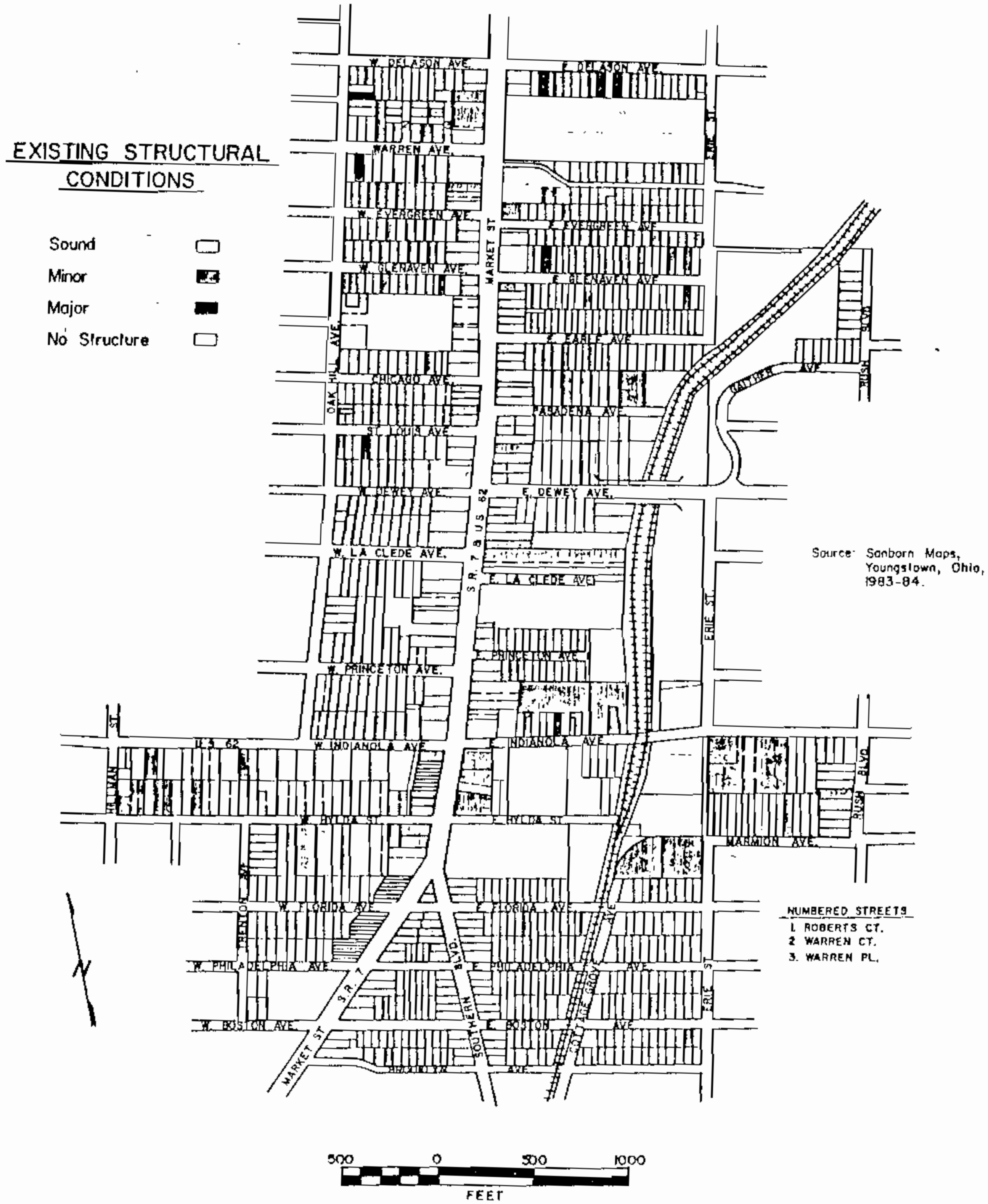
MARKET STREET REDEVELOPMENT

MAP 4



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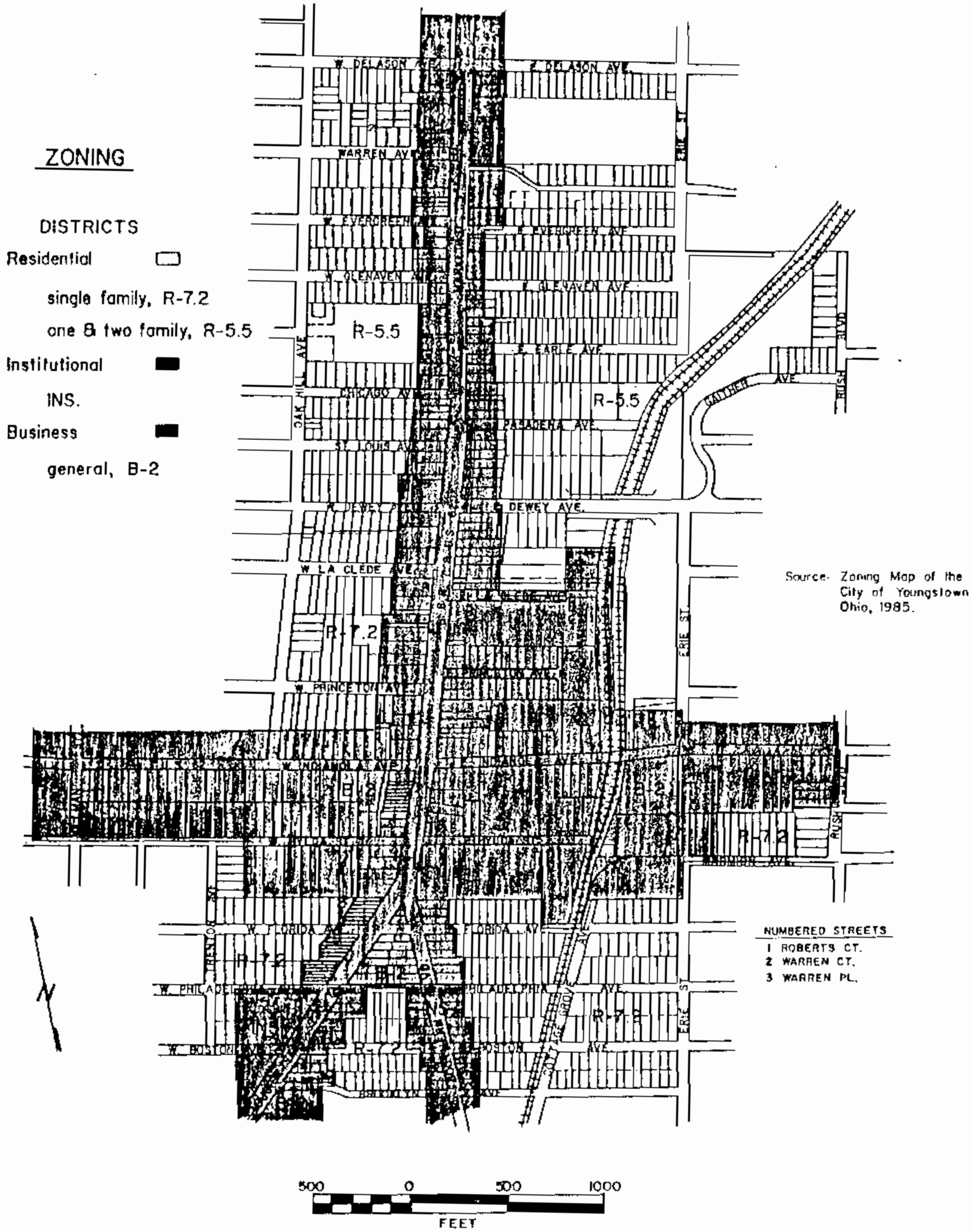
MARKET STREET REDEVELOPMENT

MAP 5



Source- Zoning Map of the City of Youngstown Ohio, 1985.

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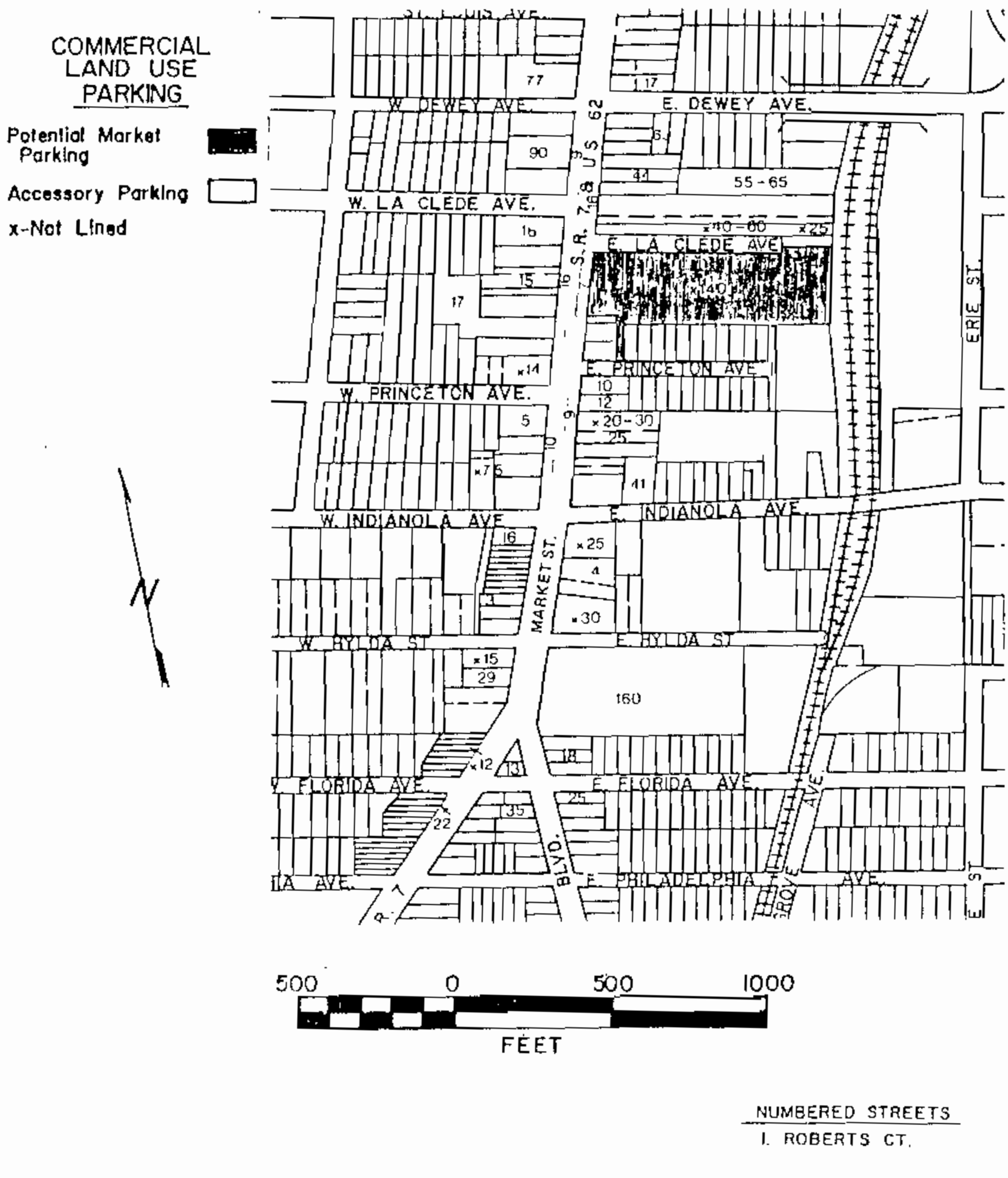
MARKET STREET REDEVELOPMENT

MAP 6



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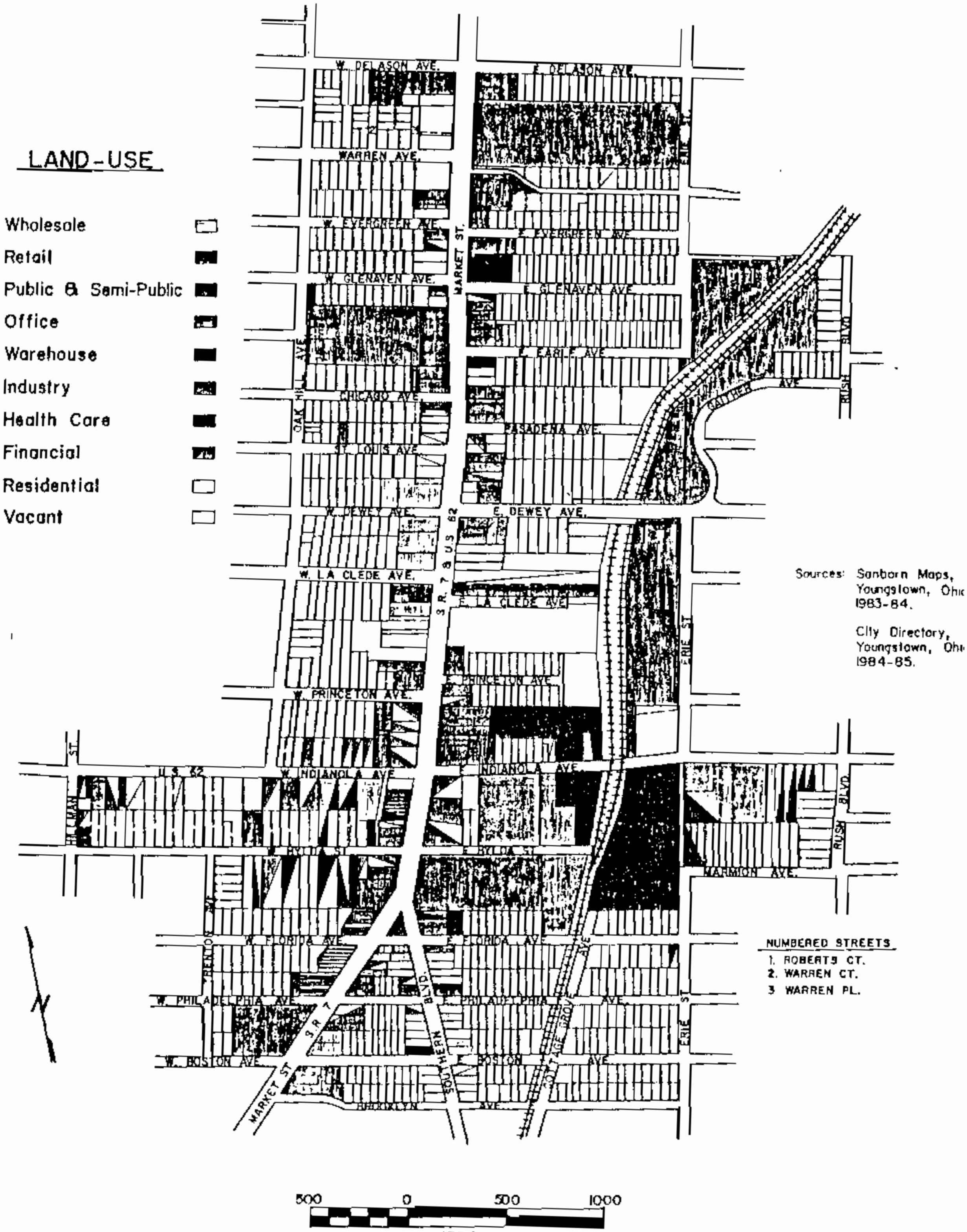
MARKET STREET REDEVELOPMENT

MAP 7



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to be changed; parking appears to be adequate; and other retail land use is located adjacent to the site.

Turning now to population characteristics, four census tracts were used as the geographic basis for this examination.[4] Mean household income, education levels, poverty levels, and occupation were examined for the four tracts. The findings included:

- The mean household income for the four tracts is $14,762.
- Just over one fourth (26.8%) of the households have a mean income over $20,000.
- For persons aged twenty five or older in the tracts, 57.3 percent received a high school diploma, and 7.1% completed 4 or more years of college.
- Overall, 8.3 percent of the civilian labor force was unemployed.
- Eighteen percent of families in the four tracts had a 1979 income level below poverty level.
- The majority (29.2%) of the employed persons in the area were working as operators, fabricators and laborers. Approximately one fourth (25.9%) worked at technical occupations. Fewer people were employed in service jobs (16.1%), as managers (15.8%), and in precision production (12.7%). Just a few people (0.4%) had farm-related jobs.

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[4]The area included tracts 8016, 8017, 8021, and 8024. Boundaries for the area are Myrtle Avenue on the north; South Avenue on the east; Midlothian Boulevard on the south; and Mill Creek, Canfield Road, Indianola Avenue, and Hillman Street on the west.

Given the lower income and education levels, the higher poverty and unemployment levels, and the primary occupations in these four census tracts, it appears that this population does not have the characteristics of current festival mall patrons.

CONCLUSION

Three studies were completed to determine the feasibility of locating a festival, or specialty, mall in the Uptown area. The first determined the market potential for this type of facility, the second analyzed the results of a household survey, and the third determined site and population characteristics for the adjacent area.

The market potential study results show that if the stores in this retail center will compete directly with other similar retail establishments in the delineated primary market area, its chances of success are slim to nonexistant because the area appears to be saturated with certain retailers. An important consideration when using this information, though, is that research on festival malls shows that they do not compete directly with individual retailers or regional shopping centers. Their drawing power for a share of the market is greater than that of other retailers because of the unique product mix that is available at festival malls. One positive aspect of the market potential study shows that the market area may be able to support more eating establishments; they are generally used as the anchor tenants for festival malls.

Survey results from a random sampling of higher income households are more positive than the market potential analysis.

Respondents shop often, many have visited and made purchases at other festival malls, most currently purchase the kinds of items offered for sale at festival markets, and many indicate an interest in shopping at a specialty shopping center in the Uptown area. The problems people have encountered when shopping in the Uptown area, and problems perceived by those who do not shop there are minor. The concern seems to be with cosmetic appearance and parking. In an unrelated study, though, many Mahoning County residents said they were afraid to go to the south side of Youngstown because of crime. This problem could play a major role in the success or failure of a retail center that depends on drawing people who want to be entertained, to dine, and to people-watch rather than purchase a necessity.

Site characteristics, for the most part, were favorable toward locating a festival mall on Market street. An examination of population characteristics for the surrounding area, though, describes a group of people who might not be able to purchase, or might not be interested in purchasing, items at this type of retail center. This information, along with figures for mean income of populations found within a given set of mile-radii, suggest that other locations may be more appropriate. But one researcher believes,

> Because of their special market appeal, specialty centers typically draw from longer distances than standard centers and as a result of their appeal are destination locations that do not rely on central locations with high visibility and accessibility plus frequent need as a reason to attend (Stewart, p. 110).

The findings of this study are mixed, but it is important to realize that each method employed has examined demand rather than supply. It appears that, with festival markets, suppliers can create their own demand by developing a truly unique retail center. Boston's Faneuil Hall, and The Station in Pittsburgh are two examples of carefully marketed, advertized, and promoted, festival malls that were not developed solely on the basis of existing consumer demand.

It has yet to be determined whether a retail center offering a unique mix of products offered for sale in a pleasing and entertaining environment can succeed if local consumers do not make purchases, and the area where the mall will be located is perceived, by at least part of the area population, to be unsafe. The question remains: will the drawing power of such a facility be strong enough to attract higher-income households in outlying areas? At this point, it might be advisable to conduct another, more extensive, shoppers survey on a larger population and ask in-depth questions to determine 1)the regional, rather than local extent of the market (Gruen, p.9), 2)the Uptown area residents' perceptions of, and visits to, similar retail centers, and 3)how perceptions of the crime level in the Uptown area do and will affect potential patrons' shopping patterns. Answering these questions will provide investors with the information they need to carry this idea to fruition.

APPENDIX A

"The number of people it takes to support a given commercial activity is referred to as the threshold population. Assuming that in the long run, competition in the marketplace will ensure that unmet demand is filled, threshold populations can be determined by calculating the average number of people per establishment in a given geographic area. For the purpose of this analysis, these averages were calculated for selected activities in the State of Ohio using the 1982 Census of Retail Trade. Normally, the Census of Retail Trade provides data for all establishments and establishments with payroll. In 1982, however, data were available only for establishments with payroll. In order to determine the total number of establishments, the proportion between establishments with payroll and total establishments in 1977 was applied to the 1982 data." (Garchar, p.19)

The population figures used in this analysis were, for the State of Ohio, 10,797,630 (Census of Population, 1980) and for the primary market area, 251,207 (Census of Population and Housing, 1980).

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