

Memorandum

City of Lawrence

Planning and Development Services

TO: David L. Corliss, City Manager

FROM: Amy Miller, Long-Range Planner

CC: Scott McCullough, Director, Planning and Development Services

Date: May 18, 2011

RE: Analysis of Lawrence's Downtown commercial space by use.

This memo provides a detailed analysis of the types of uses located in Lawrence's Downtown district. The underlying data comes from a recent re-survey of the Downtown district (May 2011), from the 2010 Lawrence Retail Market Report¹, and from the 2006 Lawrence Retail Market Report².

Square Footage by Use in Downtown District - 2006, 2010 & 2011						
Use	2006 Square Footage		2010 Square Footage		2011 Square Footage	
	#	%	#	%	#	%
Retail	378,939	27%	356,205	23%	322,619	20%
Food Services	202,050	14%	233,900	15%	238,225	15%
Non-Retail, Non-Food Services	507,175	36%	592,595	39%	606,845	38%
Hotel	165,334	12%	215,334	14%	215,334	14%
Vacant	148,541	11%	139,305	9%	199,698	13%
Total	1,402,039		1,537,339		1,582,721	

In the Downtown district, the largest use category is Non-retail, Non-food services, which, in 2011 makes up 38% of the total square footage in the Downtown district. Typical uses in this category would be professional offices, financial institutions, light manufacturing uses, religious institutions, and any residential uses. The percentage of total square footage in the Food Services use category, including restaurants, coffee shops and bars, has remained steady since 2006, occupying around 15% of the total square footage, even though the amount of square footage has grown by roughly 36,000 square feet since 2006. Vacant square footage was at 11% in 2006, fell to 9% in 2010 and has risen to 13% in 2011.

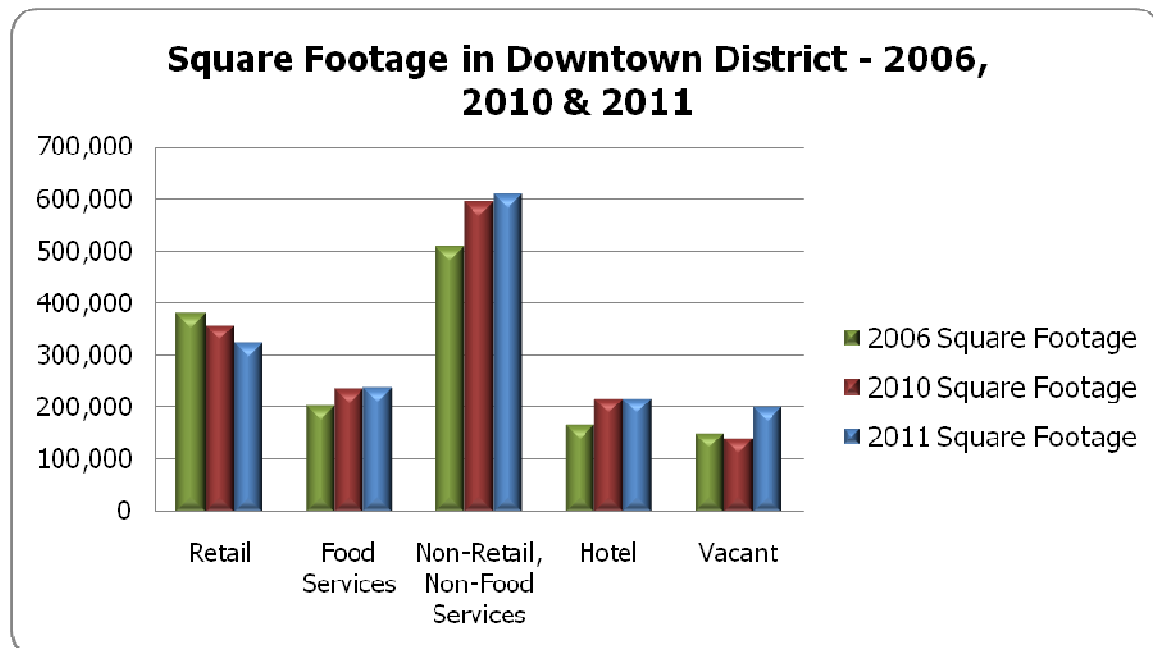
¹ <http://www.lawrenceplanning.org/documents/2010Retail.pdf>

² <http://www.lawrenceplanning.org/documents/2006Retail.pdf>

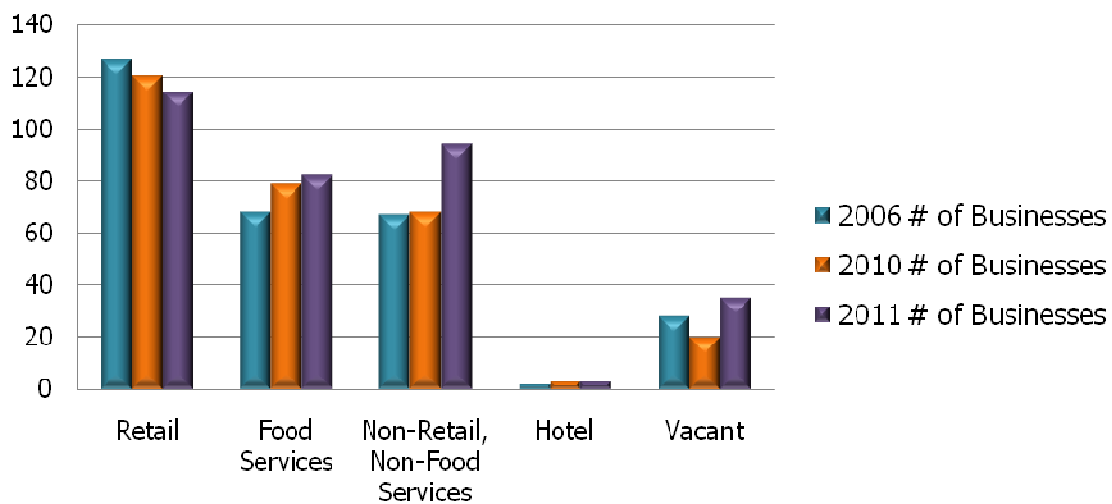
The overall square footage of the downtown district has increased from 2006 to 2010, and also from 2010 to 2011. While no new structures were physically built during that time, the changes are due to above ground floor spaces being converted to retail or office uses, changes in zoning, and more accurate square footage information being used. For this reason, staff believes comparing the percentage of square footage for each use category is more meaningful than comparing the actual square footage numbers.

# of Businesses by Use in Downtown District - 2006, 2010 & 2011						
Use	2006 # of Businesses		2010 # of Businesses		2011 # of Businesses	
	#	%	#	%	#	%
Retail	126	43%	120	41%	114	35%
Food Services	68	23%	79	27%	82	25%
Non-Retail, Non-Food Services	67	23%	68	23%	94	29%
Hotel	2	1%	3	1%	3	1%
Vacant	28	10%	20	7%	35	11%
Total	291		290		328	

While Non-retail, Non-food services uses make up the largest category in terms of square footage, it only makes up the second largest category in terms of the number of businesses. Retail uses have the highest number of businesses, while having only the second highest amount of square footage in the district. Food Services have 15% of the total square footage, but 25% of the total number of businesses.



of Businesses in Downtown District - 2006, 2010 & 2011



Overall, the percentage of total square footage that strictly Retail uses are occupying has declined since 2006, while the percentage of total square footage that Food Services uses are occupying have remained constant. The amount of vacant space has increased to 13% of the total square footage in the Downtown district since 2006.

It is important to note that this survey represents a snapshot in time and the Downtown market is extremely fluid, as evidenced by the changes since 2006. For these purposes, the Downtown District includes everything in the CD Zoning District, along with some adjacent commercial zoning districts, as noted in the following map. It should also be noted, that for the most part, only first floor spaces were included in the survey. The exceptions to this rule are the former Riverfront Mall, hotels and areas above the ground floor that were designed and/or occupied for retail uses.

