

Chapter 3.10

GENERAL REQUIREMENTS FOR SUBMISSION OF A MARKET ANALYSIS FOR B-5 PLANNED REGIONAL BUSINESS DISTRICT

*The Planning Department is assigned responsibility
for administration of these design standards.*

Section 1. GENERAL

Pursuant to the provisions of Section 27.37.070(c) of the Lincoln Municipal Code, where any application for a change of zone to the B-5 Planned Regional Business District and for a use permit substantially deviates from the Comprehensive Plan in terms of location or size, as determined by the Planning Director, the applicant shall submit a market analysis which shall serve as a guide to the City Council and Planning Commission for evaluation of such application in terms of need, desirability, supportability and its implications for the overall growth of the community.

Section 2. ESSENTIAL ELEMENTS

The applicant shall submit a market analysis report conducted by a qualified economist or an independent market analyst. Basically, the procedures and definition used by the applicant in conducting the market analysis shall follow those outlined in the report "Commercial Development Strategies for Lincoln, Nebraska" prepared by Hammer, Siler, George Associated in 1974. (Copies of the Hammer, Siler, George report are available at the Lincoln City-Lancaster County Planning Department on a loan basis.) The basic elements of the Hammer, Siler, George report consists of (a) an analysis of the basic components of the economic framework, such as population, households and Income, and employment; (b) analyses of the past and present pattern of retail expenditures and sales in the City of Lincoln and its trade area; (c) projections of retailing potentials, retail sales and space demands in the primary trade area (Lancaster County); and (d) distributions of major retail activities based on the above analyses and projections. Following the general guidelines established in the Hammer, Siler, George report, the market analysis prepared by the applicant shall contain, but not limited to, the following broad elements:

A. Delineation of Trade Areas

For practical purposes, Lancaster County can be considered as the primary trade area for any regional shopping centers located in the City of Lincoln or Lancaster County. The secondary trade area may be composed of some 27 rural counties surrounding the City of Lincoln which generally extends south to Kansas, west past Grand Island, north to the Platte River and east to Iowa. If the trade area is otherwise delineated by the applicant, an explanation shall be given and a map showing such trade area shall be prepared.

B. Forecasts of Population, Households and Income for the Trade Area

The Lincoln City-Lancaster County Planning Department has on file current population, households and income estimates for the City and County as well as their forecasts for the next 20 to 25 years and these data are available to the applicant upon request. While the applicant will be allowed to develop his own forecasts for the market analysis, if his forecasts show substantial deviation from those provided by the Planning Department, he shall quantify the differences and explain their basis of his forecasts in the report.

C. Estimation of Retail Sales Potentials in the Trade Area

Estimation of total sales potentials in the delineated trade area shall be made from number of households, average incomes per household and estimated retail expenditures per household. Sales potentials shall be expressed in current dollars and shall be broken down into shoppers goods, convenience goods and other goods which are defined as follows:

1. Shoppers goods include general merchandise; apparel and accessories; furniture and home furnishings; tires, batteries and accessories; paint, glass and wallpaper; hardware; and other miscellaneous "specialty" store categories.
2. Convenience goods include food stores, eating and drinking establishments, drug stores and liquor stores.
3. Other goods include automotive, gasoline and service stations, general building materials and other miscellaneous outlets, not often found within shopping centers.

Since in all likelihood shoppers goods will be the most important component of regional shopping center retail activity, further breakdown of shoppers goods into specific categories, such as general merchandize, apparel, furniture, hardware, auto accessories and other shall be made when estimating their sales potentials in support of proposed uses in the center. Sales potential for shoppers goods shall be estimated based on the primary trade area (Lancaster County) with consideration given to the outflow (percent of resident expenditures) and inflow (percent of total sales). Forecast of sales potentials for convenience goods shall use the Lincoln urban area as a base without regard to inflow and outflow since they tend to be off-setting, if not negligible.

D. Assessment of Impact on Other Existing Shopping Areas

The effect of the proposed shopping center on other existing shopping facilities, including major retail centers within the primary trade area (Lancaster County) shall be quantified in terms of sales volume in current constant dollar. The applicant shall be required to delineate sub-market areas showing the geographical area served by major retail facility or use the sub-market data on file at the City-County Planning Department to estimate the amounts of retail expenditures (shoppers goods and

convenience goods) to be diverted from these sub-market areas. The sub-market data was developed by Hammer, Siler, George Associated as part of the 1974 commercial study and is available to the applicant upon request. If the applicant's delineation of sub market areas and projected retail expenditures generated from each sub-market area substantially deviate from those provided by the City-County Planning Department, he shall quantify the differences and explain the basis of his assumptions. In his assessment of the impact of the proposed project on other retail facilities, the applicant shall consider those shopping facilities that do not now exist but are likely to come into being based on the Comprehensive Plan.

E. Assessment of Impact of Theater Distribution

When such an application includes the operation of a family-oriented, indoor theater, the Planning Director may request a staff analysis of the impact that the proposed additional theater screens would have on the area Theater Market. This analysis should consider, but not necessarily be limited to, the following items:

1. The impact of the proposed indoor theater structure on the surrounding area, including outdoor lighting and other pertinent factors.
2. The adequacy of available parking to service the theater and traffic flow.
3. The significance of the proposed indoor theater operation on the distribution of such recreational facilities within the city.
4. The compatibility of the proposed indoor theater to the site and the surrounding area.
5. The manner in which the public will be benefited by such a proposed use.
6. Ratio of theater screens to county population prior to and assuming application approval.
7. Distribution of theater screens throughout city prior to and assuming application approval.
8. Patterns of theater attendance for the Lincoln Theater areas for the previous five year period.
9. Percentage distribution of theater attendance among the theater areas for each of the previous five years.
10. Consistency of application with the intent of the Theater Location Policy and the adopted Comprehensive Plan.
11. Impact of additional theater screens on related land uses (for example, restaurants, drinking establishments, parking facilities and convention and tourist activities) in the downtown and other theater districts.

The Planning Director may require such additional analysis as deemed reasonably necessary to adequately evaluate the application.

Section 3. DATA AVAILABLE FROM CITY-COUNTY PLANNING DEPARTMENT

Some basic data pertinent to the preparation of a market analysis are available at the Lincoln City-Lancaster County Planning Department. They are subject to revision periodically in connection with the continuing planning process. These data include:

1. Households and income projects for City of Lincoln and Lancaster County.
2. Inventory of retail floor space.
3. Estimated retail sales.
4. Household expenditures on shoppers and convenience goods.
5. Trends and forecasts of shopper goods sales.
6. Overall forecast of retail sales by shoppers goods and convenience goods.

Section 4. REVIEW PROCESS

The market analysis, when required by the Planning Director, shall be submitted along with other documents specified in Section 27.37.070(e), Title 27 of the Lincoln Municipal Code. The Planning Director shall evaluate the document's completeness and may recommend a resubmission of the market analysis.

In the event of a disagreement between the Planning Director and the applicant concerning the adequacy of the market analysis as submitted, every effort shall be made to resolve this at the staff level. In the event that a resolution cannot be reached between the Planning Director and the applicant, the applicant shall file a written response indicating his disagreement with the recommendations of the Planning Director. This matter shall be heard by the Planning Commission and the City Council in the manner described in the following paragraph.

Upon receipt of the market analysis and other required documents, the Planning Commission shall hold a public hearing on the proposed project and shall make the market analysis available for public inspection. In reporting its recommendations to the City Council, the Planning Director's report, along with any comments regarding the market analysis made during the Planning Commission hearing, shall be submitted for the Council's consideration.

Section 5. RESPONSIBILITY OF PREPARING MARKET ANALYSIS

The applicant shall assume the total costs in connection with the preparation of an acceptable market analysis as required by the Planning Director.