A. DEMAND ANALYSIS

Purpose

This analysis is designed to provide a technical examination of the conditions that impact the market demand for the Davie Road area. Market Demand is a function of the Disposable Income that can be spent within a defined area. The spending of the residents, employees, and visitors to an area represents the ability of this group to support commercial uses. Demand is then based on the spending available.

This segment of the analysis will focus on the ability to support commercial development within the market area and, later, compare this demand with the supply that already exists, and is planned in the near future.

Market Area

The segment of Davie Road that will be addressed in this analysis is typically defined as the CRA boundaries, which extend north to SW 39th Avenue and south to just beyond Griffin Road. However, this boundary is not realistic for any market analysis. A commercial market serves a wider, more comprehensive service area than a mere strip of roadway. In addition, the immediate consideration of the market for Davie Road should also extend geographically northward to I-595, as well as east and west of Davie Road by several blocks. The Orange Drive and Griffin Road commercial areas should also be included.

Demographic and employment data for the Davie Road market is available for typically market service areas. These service areas relate to commercial development as defined in typical planning terms for Neighborhood (1-mile radius), Community (3-mile radius), and Regional (5-mile radius) commercial centers. Davie Road will function primarily as a Neighborhood commercial center, although, some of the attraction will extend beyond the 1-mile radius due to effects from the South Florida Educational Center. This major attractor may cause some spin-off impacts to the Davie Road area.

Existing Inventory

A review of the existing Land Uses in the immediate Davie Road (Table 2-1) area reveals how development has progressed over the years. A "windshield survey" was conducted that identified the various uses and the extent of development.

The predominant uses in the study area include retail, services, and office uses. The South Florida Educational Center also provides a significant presence in the area. There are several vacant parcels throughout the study area that could offer potential for growth. A listing of all uses is summarized in the following table. A detailed listing of the "windshield survey" is found in the Appendix.

TABLE 2-1
SUMMARY OF LAND USES – DAVIE ROAD STUDY AREA

CATEGORY	NUMBER
Food/Grocery	3
Restaurant	22
Automotive	20
General Retail	30
Personal Services	24
Recreation/Community	13
Finance/Insurance/Real Estate	9
Professional/Business Services	22
Education	22
Vacant Land	16
Vacant Building	6
Mobile Home Park	2
TOTAL	**189**

In addition to the "windshield survey" of the immediate market area, data was collected for the Neighborhood, Community and Regional markets through use of information from Claritas, an independent market research firm. This data reveals the overall employment activity within the three market areas by SIC code. A summary of the data is provided here with the detailed information included in the Appendix.

TABLE 2-2
EMPLOYMENT ACTIVITY – 1-MILE RADIUS

SIC CATEGORY	ESTABLISHMENTS	EMPLOYMENT
Agriculture/Mining	28	128
Construction	80	483
Manufacturing	25	279
Transportation/Utilities	24	256
Wholesale	43	382
Retail	121	820
Finance/Insurance/Real Estate	63	319
Services	265	5,141
Public Administration	7	544
Non-Classifiable	14	72
TOTAL	**670**	**8,424**

The Services category provides the largest group of employees in the 1-mile radius with 61% of the total employment. Within this category is a sub-group for Educational Services. The total number of employees in this category is 3,432, which makes Education, not only the largest sector of the Services category, but the largest employer in the entire 1-mile market area with 41%. This data underscores the significance of the South Florida Education Center, particularly since the 1-mile radius does not include the entire Center.

Retail provides approximately 10% of the employment in the market area. The Public Administration sector also provides significant employment since the Davie Town Hall and a Health Department Office are in the 1-mile market area.

TABLE 2-3
EMPLOYMENT ACTIVITY – 3-MILE RADIUS

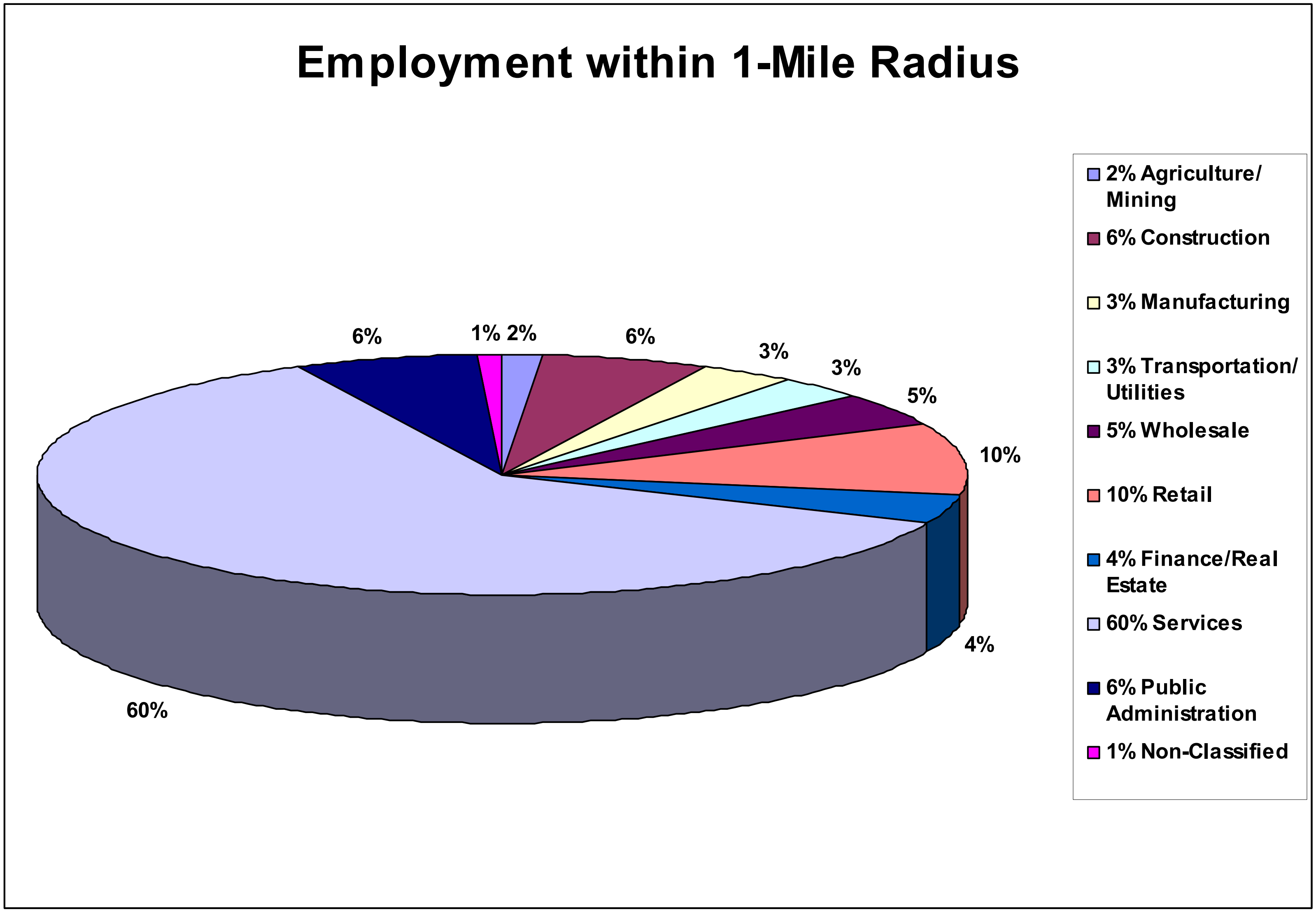
SIC CATEGORY	ESTABLISHMENTS	EMPLOYMENT
Agriculture/Mining	116	733
Construction	408	3,013
Manufacturing	237	3,458
Transportation/Utilities	173	2,308
Wholesale	330	3,100
Retail	943	10,013
Finance/Insurance/Real Estate	400	4,743
Services	1,665	24,372
Public Administration	21	710
Non-Classifiable	153	1,082
TOTAL	**4,446**	**53,532**

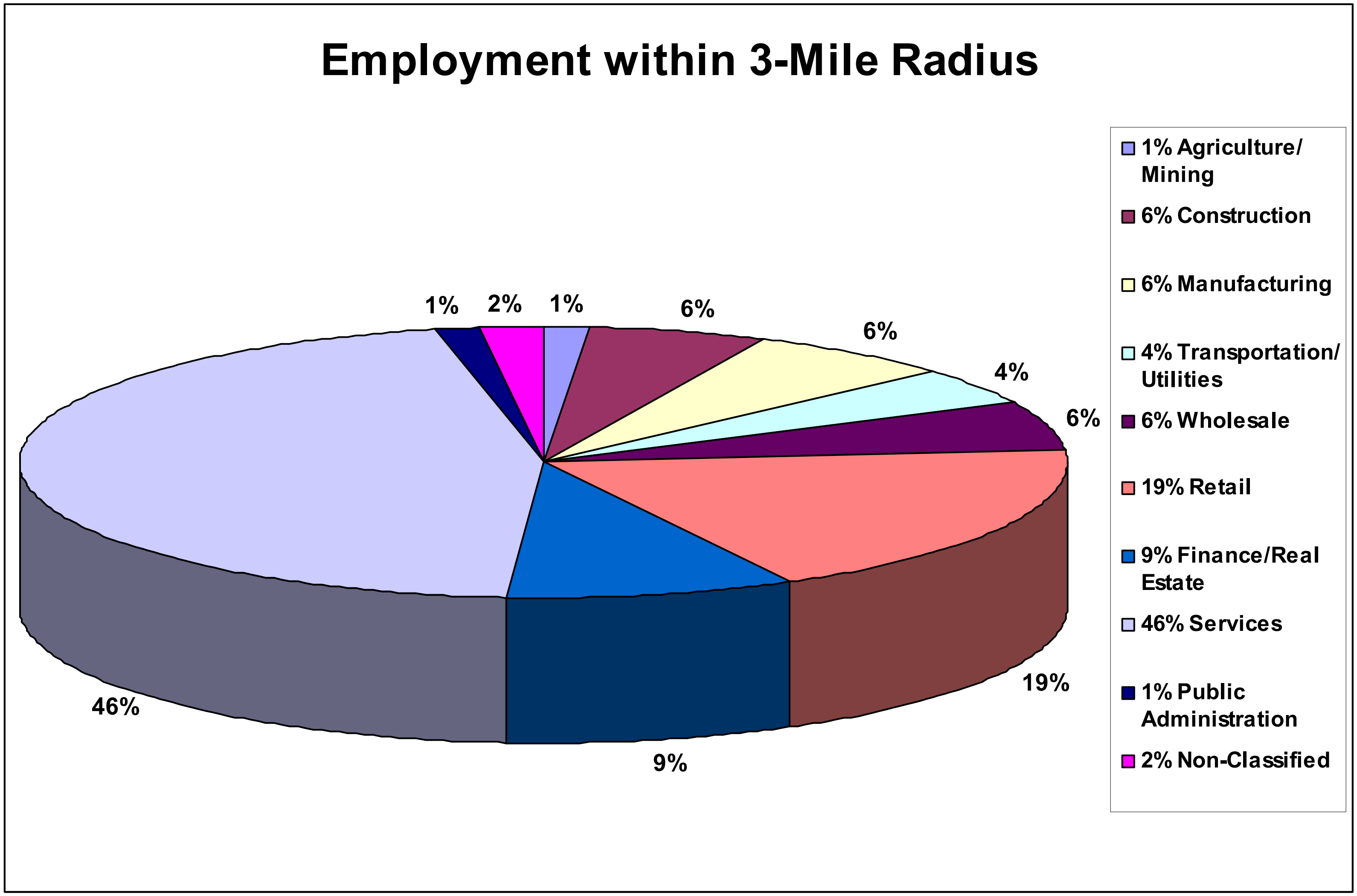
Services continue to dominate the 3-mile market area, however, the influence drops from 61% to 46%. Educational Services also fall from 41% to 16%. The most significant increase in any category is in Retail Trade, which nearly doubles to 19%.

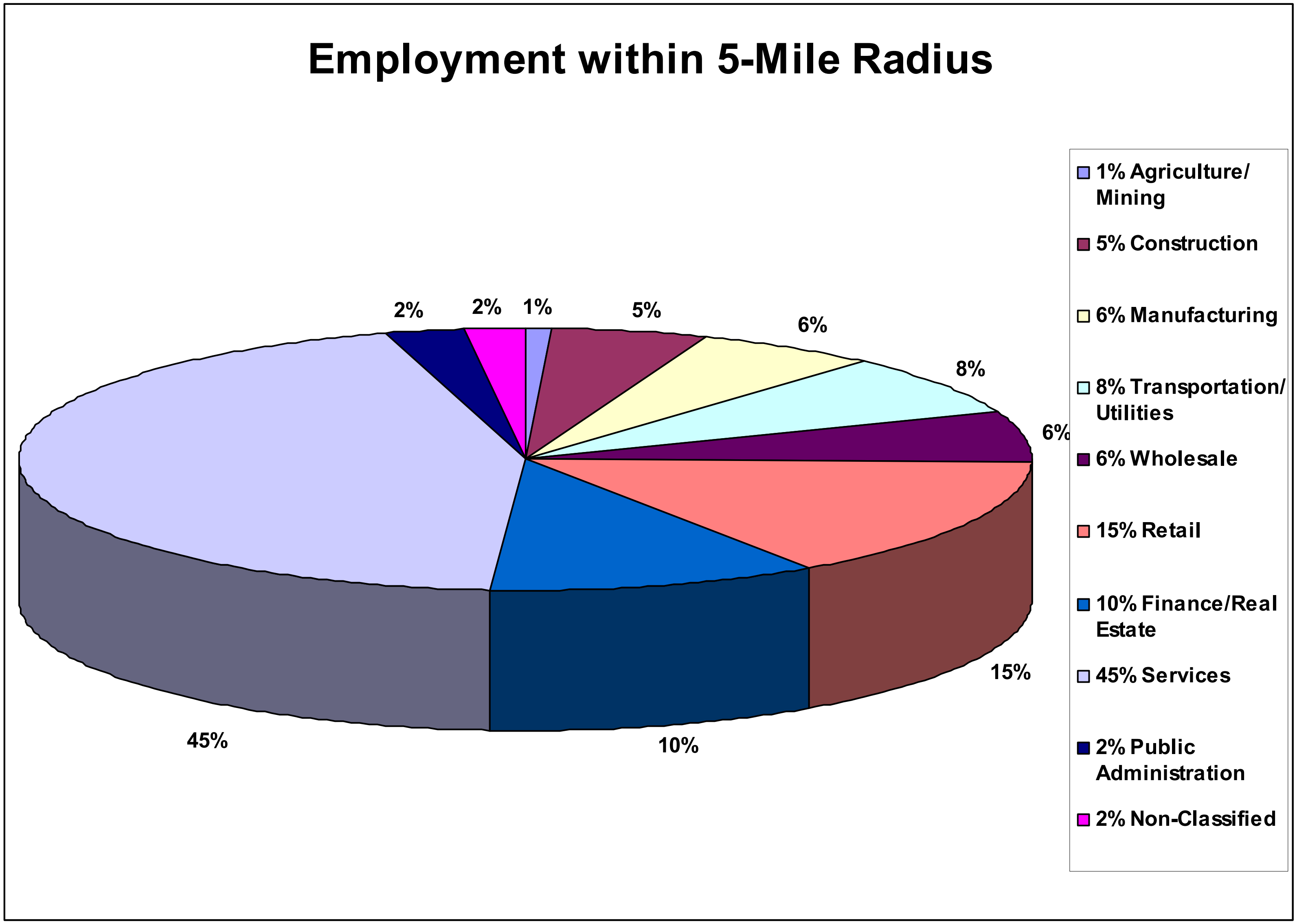
TABLE 2-4
EMPLOYMENT ACTIVITY – 5-MILE RADIUS

SIC CATEGORY	ESTABLISHMENTS	EMPLOYMENT
Agriculture/Mining	278	1,502
Construction	1,028	8,155
Manufacturing	667	9,667
Transportation/Utilities	591	12,585
Wholesale	938	10,116
Retail	3,127	25,496
Finance/Insurance/Real Estate	1,491	17,415
Services	6,034	73,754
Public Administration	123	3,814
Non-Classifiable	496	3,418
TOTAL	**14,773**	**165,922**

As the market area extends to a 5-mile radius, Services remain the largest category of employment.


Employment within 1-Mile Radius
6%
1%
2%
6%
3%
3%
5%
10%
4%
60%
2% Agriculture/ Mining
6% Construction
3% Manufacturing
3% Transportation/ Utilities
5% Wholesale
10% Retail
4% Finance/Real Estate
60% Services
6% Public Administration
1% Non-Classified


Employment within 3-Mile Radius
1%
2%
1%
6%
6%
4%
6%
19%
9%
46%
1% Agriculture/ Mining
6% Construction
6% Manufacturing
4% Transportation/ Utilities
6% Wholesale
19% Retail
9% Finance/Real Estate
46% Services
1% Public Administration
2% Non-Classified


Employment within 5-Mile Radius
2%
2%
1%
5%
6%
8%
6%
15%
10%
45%
1% Agriculture/ Mining
5% Construction
6% Manufacturing
8% Transportation/ Utilities
6% Wholesale
15% Retail
10% Finance/Real Estate
45% Services
2% Public Administration
2% Non-Classified

Demographics

Analysis of the demographic data collected from Claritas also reveals a significant difference in the three geographic markets. A summary of the data is found here, with the full report included in the Appendix.

TABLE 2-5
SELECTED DEMOGRAPHIC CHARACTERISTICS

CHARACTERISTIC	1-MILE RADIUS	3-MILE RADIUS	5-MILE RADIUS
Population (2002)	13,049	93,116	305,715
Households	5,338	36,221	116,385
Average HH Size	2.44	2.56	2.62
Average HH Income	$49,525	$56,713	$59,098
Attended College (%)	37.48%	43.98%	48.11%
Median Age	33.72	36.80	37.51
Average Commute Time	23.91 minutes	23.85 minutes	23.95 minutes
Unemployment Rate	4.96%	3.70%	3.51%
Owner Occupied (%)	58.00%	72.42%	73.68%

The primary focus of the analysis will be on the 1-mile radius, to address the Neighborhood commercial requirements. However, this comparison with the surrounding communities is valuable in understanding the Davie Road area.

The principal items to consider regarding the amount of spending are: Average Household Income and Average Commute Time. For the type of retail spending, three items are significant: Median Age, Education, and Owner Occupied Units.

A summarization of the findings is:

- The population in the immediate study area is younger, less educated, and less affluent.
- Densities are reasonably similar in three segments with a slightly higher density in the 1-mile radius.
- A majority of the work force in all areas travel a significant distance to work.
- The population in the 1-mile radius is more transient.
- Unemployment is higher in the 1-mile radius.

Market Demand

The calculation of demand is a function of the amount of spending possible in the market area. This spending comes from three groups: residents who spend Disposable Income, import employment, and those who traverse the area. Each group will be analyzed separately.

<u>Resident Demand</u>

Data required to calculate the demand from the residents of the area includes the number of households and the income levels of this group. This data was obtained from Claritas Inc., a national firm that provides demographic and marketing data to development firms and planning groups. Data is updated on an annual basis and reflects the most comprehensive information available.
Factors required to complete the analysis of demand include:

- Income per household
- Number of households
- Disposable Income Rate
- Propensity to Spend for Retail
- Ratio of Sales to Square Footage

RETAIL SPACE DEMAND CALCULATIONS

Income per Household	$49,525*		
Households (year 2007)	5,338*		
Total Income	$264,364,450		
Disposable Income @ 45%**		$118,964,000	
Propensity to Spend for retail		80%**	
Total Retail Spending			**$95,171,200**
Square Feet Demanded @ $250/square foot**			**380,700**

Sources:* Claritas
** Survey of Buying Power

Employees Demand

Employees of establishments within the Study Area also create a demand for retail uses. The demand for space is determined by calculating the number of employees and the average spending per day of this group. The spending per day reflects the average amount per employee. While some employees go out to lunch daily, others rarely leave the premise of their employment. Either because of limited lunch periods, or to save money, this group spends little or nothing in the vicinity of their workplace. To reach an estimate of the total spending by the work force, an average of $2.50 per day will be used.

The amount of employment in the Study Area is obtained through use of the Claritas reports. In the one-mile Study Area, a total of 8,424 people are employed in 670 business establishments. Most of this group travel into the Study Area to work. This fact is established by comparing the total amount of the population of the Study Area that is employed (8,424) with the total amount of workforce in the Study Area (6,959). Additionally, the 1,799 people who live in the Study Area do not all work within the Study Area. Data shows that 76% of the population drives over 15 minutes to get to work. This drive time will take them outside of the Study Area. Based on this analysis, a total of 1,643 people who live in the Study Area also work in the Study Area. The remaining 6,781 employees are import labor to the Study Area.

The demand for retail space for the outside employment in the Study Area is as follows:

Import Employees	6,791*		
Workdays per year	240		
Total Employee Workdays		1,627,440	
Average Spending per Employee per Day		$2.50**	
Total Retail Spending			**$4,068,600**
Square Feet Demanded @ $250/square foot**			**16,300**

Sources:* Claritas
** Survey of Buying Power

Traverse Population Spending

The key issues regarding the amount of spending by those persons who traverse the area are: the capture rate of this group and the average spending in the Study Area. The current characteristics of the group traveling through the Study Area may not be entirely reflective of the situation that will occur in the future. More people may drive into the area after redevelopment because more attractors exist. In addition, the capture rate after redevelopment will likely be much higher than today, because more attractive uses will be established. This analysis will begin with empirical data, and then make certain assumptions regarding the future.

The amount of people who drive through the area can be identified through use of traffic count data supplied by the Broward County MPO. Counters have been placed at two locations that impact the Study Area. Counters are placed on Davie Road at:

- North of Griffin Road
- North of Nova Drive

The MPO establishes two figures for traffic analysis; the first is the actual counts for the year 2002; and the second is an estimate of traffic for the year 2025. This data indicates a significant shift in the traffic movements along Davie Road. The location at Nova Drive lists a moderate increase for the future, increasing from 41,000 trips per day to 44,400. The Griffin Road location is expected to experience a significant increase from 28,100 trips per day in 2002 to 44,300 trips in 2025, or an increase of nearly 58%. Based on these figures, it is clear that a total of 44,300 vehicles trips per day will pass along Davie Road.

The capture rate will consider those persons who will stop for the restaurants and other retail uses. Assuming that the retail will develop in such a manner that it will be attractive to the traffic passing, a capture rate of 5% is assumed.

Spending by this group must also be estimated to determine total spending. The assumption used in this an analysis will be $100 per year, or approximately $2 per week. The calculation of spending and demand for retail space is as follows:

Traffic Counts per day	44,300*		
Adjusted for 2-way Trips	22,150		
Vehicles per year	8,084,750		
Capture Rate		5%**	
Vehicles captured per year		404,250	
Spending per Person		$100**	
Total Retail Spending			**$40,425,000**
Square Feet Demanded @ $250/square foot			**161,700**

Sources:* Broward County MPO
** PMG Associates, Inc.

Total Retail Space Demanded in the 1-mile radius Market Area (square feet):

Residents		380,700
Employees		16,300
Transverse:		<u>161,700</u>
TOTAL	``	558,700

The analysis provided above address retail uses and the ability to support the market. In addition to retail uses, office space could also be provided along Davie Road. There is no direct stimulus for office uses, such as Disposable Income. However, relationships do exist between retail and office uses. Based on the existing development in the Davie Road area, the amount of office space that could be supported is equal to approximately 37.5% of the retail demand. Based on that ratio, the area could support approximately 209,500 square feet of office space.

The actual amount of retail, office, and housing that could be developed in the immediate study area will also be influenced by the allowable development in the Regional Activity Center (RAC). The total amount of space that could be added is governed by the agreement that originally established the RAC. This agreement between Davie and the County will control the amount of growth.

Existing and Planned Supply

To identify the current extent of development in the study area, a review of the existing amount of commercial establishments was conducted. Identification through internet Yellow Pages revealed the number of establishments in certain categories. These categories are representative of the types of establishments that could be considered. No general retail or merchandising establishments were selected since the category is so broad that it is not possible to conduct a reasonable search. Additionally, the listing provides each instance where an establishment was identified. Some businesses are included in more than one category (i.e., grocery and drug store). In this review, each time an establishment was identified it was included in the category. Therefore, some establishments were listed more than one time.

The categories chosen for this review include:

- Grocery Store
- Restaurants
- Drug Store
- Department Store
- Movie Theater
- Hotels

The identification of the establishments provided the following listings for each of the three study area radii. A detailed listing of the establishments is found in the Appendix.

Category	1-Mile Radius	1 to 3-Mile Radius	3 to 5-Mile Radius
Grocery	2	20	64
Restaurant	13	155	295
Drug Store	0	16	44
Department Store	0	8	22
Movie Theater	0	1	2
Hotel	0	6	37

In addition to the literature research for the competition, the "windshield survey" that was conducted was also expanded to address the amount of commercial space available in the immediate study area. The survey concluded that the following is a reasonable estimate of the existing supply of space.

- Retail – 187,000 square feet
- Commercial Office – 70,200 square feet
- Government and Other – 48,500 square feet
- Motel and Other – 37,900 square feet.

The analysis of the commercial space that could be supported in the study area indicated that a total of 558,700 square feet of retail space could be supported by the residents, employees, and traverse population of the area. Therefore, another 371,700 square feet of retail could be supported.

The amount of retail space could also be significant with approximately 139,400 square feet of office space supported, based on the current distribution of retail to office.

This significant demand for commercial activity in the area underscores the loss of business to other competitive markets. The University Drive and Stirling Road areas appear to be where most of the lost business is going. In addition, the attraction of the Broward Mall and its regional appeal also draws retail spending as a spin-off of the regional shopping needs.

B. TREND ANALYSIS

Analysis of trends regarding commercial activity that impacts the Davie Road Corridor must focus on both the local aspects as well as regional influences. This chapter will address the local markets. Regional aspects will be discussed in a later segment.

Davie Road

Davie Road has experienced a downturn in its development with loss of significant businesses (Winn-Dixie) and a deterioration of the remaining buildings. Several new projects have been built in the past few years including new office and some retail. However, the trend has seen more business closings or relocations than openings.

The most significant new project that is underway in the area is the new mixed use development on the southeast corner of Davie Road and Griffin Road. This project will contribute new commercial supply as well as a population base that will provide a market for the commercial activity. Although this property is located on the southern end of the study area, its impact should extend through the rest of the Davie Road Corridor.

Overall Local Market

When addressing the local market, it is necessary to address the study area with regards to the type of commercial activity planned. The three commercial types (Neighborhood, Community, and Regional) all serve specific geographic markets. Davie Road will serve a Neighborhood commercial market, which is typically defined as a 1-mile radius from the center point of the study area. After a review of the existing competition to Davie Road and the location of major influences (Education Center), this radius may have to be extended to between 1.5 and 2.0 miles. The 1.5 mile radius takes into account the University Drive business sector.

A review of all of the existing business in the key industries reveals a picture of the type of commercial activity that has developed and the patterns that exist. Davie Road proves to be a small island of activity that exists in a commercial vacuum that stretches outward from the center point (SW 42 Street and Davie Road) approximately 1.5 to 3.0 miles. The principal commercial activity takes place in a "ring" around this center point with the following boundaries.

- West – University Drive
- North – Davie Boulevard/Broward Boulevard
- East – State Road 7
- South – Stirling Road

These four commercial activity centers offer the primary competition to the Davie Road corridor, and include a regional mall (Broward Mall) located 3.8 miles from the center point of the study area.

The commercial development in the "ring" provides all of the basic and extended service needs of the population. With the regional mall, virtually all aspects of the commercial needs of any population are met.

New Development/Competition

New commercial activity is occurring primarily in three general locations. These segments are:

- Stirling Road
- Griffin Road (West of University Drive)
- Hiatus Road

Although development has existed in these locations for many years, the sites offer a mix of older and new commercial activity. Most of the new establishments are in these locations.

The other location for new commercial activity revolves around the development plans of Nova Southeastern University. The University has acquired several commercial sites along University Drive and plans to develop commercial and residential projects. These projects will be developed as part of the endowment program of the University and will be proprietary establishments that will generate income for the University Foundation. Despite the ownership of the commercial projects, they will function as typical retail, office, and multi-family residential entities.

C. CUSTOMER PROFILE

An identification of the profile of the customers and potential customers of the market area is significant in order to provide the type of commercial activity most desired. This identification of the profile was accomplished through two surveys. The first identified business owners in the study area and solicited data regarding their customers.

The second survey was conducted with professional staff at the South Florida Education Center to determine the services that they desire. The methodology for the use of the surveys in the completion of this task was developed through a joint effort between the Consultant and the CRA staff.

Survey of Downtown Davie Business Owners

A profile of the customer on Davie Road was obtained through a survey of the businesses located on that stretch of roadway. The survey was conducted by mail with telephone follow-up. The response form the business owners were very good with a response rate of 71% (58 out of 82). Responses were either mailed or faxed to PMG Associates offices.

1. What type of business do you have? (Restaurant, professional office, auto repair, etc.)

Type of Business	Number	Percent
Retail: Groceries, drug stores, TV & radio sales & service, medical supplies, school books, used furniture, consignment & pawn shops, video rentals, gifts & flower shops, sewing, clothing.	**18**	**31.0**
Professional offices & services: Law offices, medical professionals, consultants, realtors, insurance agents, financial services	**13**	**22.4**
Restaurants: Fast food and tabletop	**9**	**15.5**
Personal care & services Hair salons, social services, pet care, day care, funeral services, and tourist lodging	**9**	**15.5**
Auto repair & service: Auto repair, gas stations, tires & auto parts	**9**	**15.5**
Total	**58**	**100.0%**

A wide variety of Davie businesses are represented by the participants, from restaurants, retail establishments, professional and personal services, to auto-related businesses.

2. Where do most of your customers come from? Are they local, come from the education center, or do they come from other municipalities such as Weston, Hollywood, Plantation, etc?

Source of Customers	Number	Percent
Local, Davie, campus	38	65.5
Other nearby communities	31	53.4
State of Florida, out of area	4	6.9
Out of state	2	3.4
Multiple responses were given, the total equals more than 100%.		

Approximately two-thirds of the respondents reported that their customers are local. Over half also reported customers coming from neighboring communities. A few reported customers coming from outside of the area, either from more distant Florida communities, or from out of state.

3. Describe your current customer. What age group, do they come alone or in a group, do they come in once or is it a repeat business?

Customer Characteristics	Number	Percent
All ages, from 18 to 80	36	62.1
Come alone	12	20.7
Come in groups	7	12.1
Families with young children	5	8.6
Students & teachers	3	5.2
Couples	3	5.2
Middle-aged	2	3.4

Young married couples	1	1.7
Small shop owners	1	1.7
Business professionals	1	1.7
Repeat customers	44	75.9
Come in only once	4	6.9
Multiple responses were given, the total equals more than 100%		

The customers are all ages of adults, with only a small number of children. According to those who specified this characteristic, more come into the businesses alone than in groups. The customers are not only students, or educators, but couples, middle-aged, and other business owners or professionals.

The one characteristic which is agreed upon by almost all of the participants is that their customers come in more than once. Many report and emphasize their repeat business.

4. If you know, does your customer only stop at your place of business, or do they go elsewhere in Downtown Davie?

Do they stop elsewhere?	Number	Percent
Yes	36	62.1
No, only come to this business	8	13.8
No answer	14	24.1
Total	**58**	**100.0**

Of those who responded to this question, there is wide acknowledgement that their customers visit other businesses in the area, before or after visiting their business. Therefore, the more businesses in the area, the more customer activity could be expected, because people do wander from shop to shop while they are in the area.

Comments:

The business owners were quite willing to share their ideas about downtown Davie and what they think would improve it. The following comments are all of the comments given.

"Need a lot of improvements."

"Median in front of office is hindering to employees and customers trying to go north."

"Widen roads even more."

"After the town improved the sidewalks and lighting, we need traffic lights. If the traffic is slower, the public might know what businesses are located in our town, especially Davie Road, where children are going to school."

"Traffic goes by too fast (Davie Road)."

"Do not favor parking in rear."

"Across the street--house is a business and is an eyesore. Several calls to city and nothing is done."

"Extend beautification east on Orange Drive to blend in with the rest of downtown area.

"Bench for a bus stop."

"Please keep me updated on meetings and plans, etc. I would like to assist in any way I could. Also, I had a concern about signage. Is there any way to get a sign that meets town criteria without spending $600? Contact me anytime."

"I have been here since 1985, and I love the new look of the downtown area. Keep the western theme. It stands out from the other cities."

"I have been trying to get the vacant lot next to my business cleaned up for six months. I also have been trying to get garbage cans put at the bus stops in front of my business for two months."

"Too many fast food restaurants."

"Anything to keep the students around to spend their money."

"It would be good for all downtown business, to get more business from the education center, BCC, FAU, the law school, dentist school, doctors' school, cop school, McFatter, etc."

Survey of Davie Education Center Employees

A survey was conducted of the professional staff at the Davie Education Center, using a survey instrument that was distributed by the Administration of each of the entities. Survey forms were placed in mail boxes of individual professional staff, or distributed personally. Completed forms were either mailed or faxed to PMG Associates. The survey was completed over a two week period in May 2003.

1. Where do you work?

Answer	Number	Percent
Nova University	26	50.0
Florida Atlantic University	15	28.8
University of Florida	7	13.5
Broward Community College	4	7.7
Total	**52**	**100.0**

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Fifty-two educators responded to the questionnaire about their patronization of Davie commercial establishments. Five in ten were associated with Nova University, three in ten from Florida Atlantic University, with the remaining respondents from the University of Florida and Broward Community College.

2. Hours and days you normally work?

Days worked	Number	Percent
Monday - Friday	36	69.2
Monday - Thursday	1	2.0
Monday - Saturday	1	2.0
Tuesday & Thursday	1	2.0
No answer	13	25.0
Total	**52**	**100.0**

Over two-thirds of the respondents work a full work week, Monday to Friday. One quarter elected not to answer the question and the remaining three respondents worked other schedules.

Number of hours/ week	Number	Percent
Less than 35 hours/week	2	3.8
35 to 40 hours/week	42	80.8
More than 40 hours/week	8	15.4
Total	**52**	**100.0**

Four out of five respondents work 35 to 40 hours per week. The majority of the others are working more than 40 hours per week, with only two reporting less than 35 hours per week.

3. What type of service(s) or business(es) do you feel are missing from the Davie Road/Downtown Davie area?

Type of Service	Number	Percent	Category Subtotal
Food Service			
Coffee/tea shops, bakeries, some combined with bookstores.	10	19.2	
Nice ,sit-down restaurants, upscale dining	10	19.2	
Sit-down chain restaurants	10	19.2	
Health food, vegetarian	6	11.5	
Not fast food	6	11.5	
Ethnic restaurants, such as Thai, Chinese, Mexican, and Indian	6	11.5	
Restaurants--not specific	5	9.6	
Pleasant mid-priced restaurants	4	7.7	
Doughnut shops	4	7.7	
Bars & happy hour places, with food	3	5.8	
Outdoor seating	2	3.9	
Cafes	2	3.9	
Subtotal for food services			**68**
Retail			
Upscale, unique, boutiques	5	9.6	
General merchandise discount stores	5	9.6	
Bookstores	4	7.7	
Health food stores	4	7.7	
Supermarkets/grocery stores	4	7.7	
Department stores	4	7.7	
Retail, stores	4	7.7	
Clothing stores & accessories	3	5.8	
Drug Store	2	3.9	
Art stores, art galleries	2	3.9	
Gift stores	2	3.9	
Miscellaneous retail	4	7.7	
Subtotal for retail			**43**
Services			
Dry cleaners	3	5.8	
Post office & Western Union	3	5.8	
Shoe & leather repair	2	3.9	
Laundromat	2	3.9	
Salon, nail salon	2	3.9	
Banks	2	3.9	
Miscellaneous services	3	5.8	
Subtotal for services			**17**
Recreation and Leisure			
Health/fitness	2	3.9	
Movie theater	1	1.9	
Entertainment	1	1.9	
Recreation/video game center	1	1.9	
Subtotal for recreation			**5**
Multiple responses were given, the total equals more than 100%.			**133**

Comments

Some of the respondents volunteered comments, in addition to listing the types of establishments they'd like to see in Davie. The comments fall into two categories: those about the roads and remarks about the town center.

Roads

"All roads should be done over."

"Better signals."

"Twin lanes, especially Nova and College & ..."
"I-595 and Davie Road needs a motel and a restaurant."

Town Center
"Space seems to be limited, so I don't get what you could attract."
"Some variety would be nice."
"Downtown is somewhat shabby."
"We need more open-late businesses for students nearby."
"There is no town."
"There isn't much in downtown Davie, except gas stations and fast food restaurants."
"Less of a Western town atmosphere."
"Rarely go downtown since Armadillo moved to University."
"The Town of Davie can fill a niche market. Look at what they have done with Harrison Street in downtown Hollywood."

Interpretation of the responses about services and businesses which respondents felt were missing.

Roughly half of the responses about missing businesses and services were about the kind of eating establishments which are available. The fast food restaurants are not meeting people's needs to have a pleasant, leisurely, healthy meal, to sit down, inside or outside, to have a coffee, lunch, dinner, or a business lunch. Coffee shops, combined with bakeries or bookstores, provide places for people to hang out, read a book or newspaper, watch other people, and meet friends. Bars and happy hour establishments do the same thing, at a different time of day, with a different menu. People are willing to spend more money for "nice restaurants," "pleasant, mid-priced restaurants," and cafes. Health is a factor, both in terms of not wanting to eat at fast-food restaurants, and in wanting healthy, vegetarian, and ethnic choices. Ethnic restaurants combine the desired qualities of a reasonably-priced sit-down meal with many healthy or vegetarian choices on the menu. Many respondents also mentioned chain restaurants by name. In looking at the list sought, all provide a sit-down experience, with table service and a varied menu. Most also provide atmosphere or a themed décor.

Upscale is also the primary quality of missing retail. People want art galleries, unique gift shops, boutiques, clothing stores, and book stores. Health is again a factor, with four respondents requesting health food stores or upscale gourmet (which usually means healthy alternatives as well as expensive, hard-to-get foods). There were several mentions of necessary retail, such as grocery stores, discount stores, and clothing stores.

Desired services were very oriented toward the functional kind of lunch-hour errands which can't wait for the weekend, such as the bank, post office, laundry, and shoe repair. Lunch hours are often spent taking care of business, or, as the food service list indicates, gathering with friends or coworkers for a social and food occasion.

There were five responses mentioning recreation and leisure activities.

4. If that type of service or business were available on Davie Road, in Downtown Davie, would you frequent it?

Response	Number	Percent
Yes	45	86.5
No	2	3.9
No answer	5	9.6
Total	**52**	**100.0**

Nearly nine in ten respondents said they would frequent the requested establishment in Davie, if it were available.

5. If "no", why not?

"Ugly architecture."
"I don't live or shop in Davie."

6. Where do you go to eat currently?

Restaurant	Number	Percent	Category Subtotal
Moderate restaurants			
Ruby Tuesday's	7	13.5	
Bennigan's	7	13.5	
Alehouse	3	5.8	
Geronimo's	3	5.8	
Longhorn	3	5.8	
Sweet Tomatoes	2	3.9	
Delaventura's	2	3.9	
Armadillo's	2	3.9	
Quarterdeck	2	3.9	
Max's Brasserie	2	3.9	
DuBarry	1	1.9	
Shell's	1	1.9	
Lefty's	1	1.9	
Carrabbas	1	1.9	
Marconi Grill	1	1.9	
Flannigan's	1	1.9	
Crazy Polle	1	1.9	
Small cafes	1	1.9	
Denny's	1	1.9	
High-end fast food	1	1.9	
TGIF Fridays	1	1.9	
84 Diner	1	1.9	
Lum's	1	1.9	
Subtotal Moderate			**46**
Ethnic restaurants			
Thai, Bangkok Cafe	2	3.9	
Pink Buddha	1	1.9	
Subtotal ethnic restaurants			**3**
Fast-food restaurants			
Wendy's	5	9.6	
McDonald's	4	7.7	
Pizza Loft	3	5.8	
Subway	2	3.9	
Dunkin Doughnuts	2	3.9	
Pizza Hut	1	1.9	
Tower Pizza	1	1.9	
Burger King	1	1.9	
Dairy Queen	1	1.9	
Fast foods--not specified	3	5.8	
Subtotal fast food restaurants			**23**
Location descriptions			
University Drive	15	28.8	
On campus	7	13.5	
Local restaurants	1	1.9	
Broward Mall	1	1.9	
Fort Lauderdale	1	1.9	
Hollywood Beach	1	1.9	
Restaurants north of 595	1	1.9	
Pembroke Pines	1	1.9	
Subtotal for other restaurants			**28**
Multiple responses were given, total equals more than 100%.			

Note: All of these are mentions other than "home" and "brown bag". These are the responses for restaurants mentioned by those who eat out. Those respondents that do not eat out at all total 6.

The most responses were for moderately-priced restaurants with table service--places where respondents could have a leisurely social time with others without being rushed. Ruby Tuesday's and Bennigan's were the two most frequently mentioned establishments. University Drive was the most frequently mentioned location.

When do you eat out, before work, at lunch, or after work?

Time to Eat Out	Number	Percent
Before work	3	5.8
At lunch	15	28.8
After work	5	9.6
Not specified	29	55.8
Total	**52**	**100.0**

Less than half of the respondents specified when they eat out. The majority of those who did respond to that question said they eat out at lunch.

7. Where do you go to shop currently?

Location/Store	Number	Percent	Subtotal
Malls			
Broward Mall	12	23.1	
Tower Shops	8	15.4	
Sawgrass Mall	3	5.8	
Fashion Mall	2	3.9	
Pine Ridge Plaza	1	1.9	
Galleria	1	1.9	
Weston Town Center	1	1.9	
Fountains	1	1.9	
Mall (unspecified)	3	5.8	
Subtotal for malls			**32**
Specific Kinds of Stores			
Supermarkets	14	26.9	
Other discount stores,	10	19.2	
Discount clothing stores	4	7.7	
Drug stores	3	5.8	
Other stores	2	3.9	
Subtotal for stores			**33**
Towns & Cities outside of Davie			
Near my home (unspecified)	2	3.9	
Fort Lauderdale	2	3.9	
Boca Raton	2	3.9	
Miami	1	1.9	
Las Olas area	1	1.9	
Pembroke Pines	1	1.9	
Plantation area	1	1.9	
Miramar	1	1.9	
Subtotal for outside of Davie			**11**
General Locations or Street Addresses			
University Drive	8	15.4	
Not in Davie	2	3.9	
Davie Road & Nova Drive	1	1.9	
Broward Boulevard	1	1.9	
Subtotal for general locations			**12**
Multiple responses are given, total equals more than 100%.			

Do you shop, before work, at lunch, or after work?

Time to Shop	Number	Percent
Before work	5	9.6
At lunch	7	13.5
After work	7	13.5
Did not specify a time	33	63.4
Total	**52**	**100.0**

Most of the respondents did not specify when they shop. Of those who selected a time, slightly less picked before work compared to lunch time or after work. In fact, equal numbers shopped at lunch or after work.

8. Where do you go for services (car repair, appliance repair, etc) currently?

Service	Number	Percent	Category Subtotal
Service Business Named			
Kovacs	5	9.6	
Sears	3	5.8	
Goodyear	2	3.9	
Speedee's	2	3.9	
Firestone	2	3.9	
Glen's Automotive	2	3.9	
Circuit City	1	1.9	
Tires Plus	1	1.9	
Bob Simon (car repair)	1	1.9	
Honda Dealer Rick Case	1	1.9	
Century Automotive	1	1.9	
Davie Tire Outlet	1	1.9	
Jiffy Lube	1	1.9	
Shell station	1	1.9	
Meineke	1	1.9	
Subtotal for specific companies			**25**
Other mentions			
Car dealer (not specified)	7	13.5	
University Drive	5	9.6	
Appliances (service contract)	1	1.9	
Davie Road	1	1.9	
Downtown Davie	1	1.9	
Subtotal for other mentions			**15**
Outside of Davie			
Near home	8	15.4	
Fort Lauderdale	4	7.7	
Boca Raton	2	3.9	
Pembroke Pines	1	1.9	
Miami	1	1.9	
Hollywood	1	1.9	
Plantation area	1	1.9	
Weston	1	1.9	
Not Davie	1	1.9	
Subtotal for mentions outside of Davie			**20**
Multiple responses are allowed; totals equal over 100%.			

The respondents were quite specific with company names about where they take their cars for repair. Roughly half mentioned a specific garage or dealer. Almost as many (20) mentioned locations in other towns, presumably near their homes.

Do you go for services, before work, at lunch, or after work?

Time for Services	Number	Percent
Before work	6	11.5
At lunch	1	1.9
After work	1	1.9
Did not specify a time	44	84.6
Total	**52**	**100.0**

Most did not specify a time. Of those who did select a time, most have their cars serviced before work, presumably leaving the car for the day. This is certainly advantageous for auto dealers and repair shops in Davie, near places of employment.

D. LOCAL AND REGIONAL GROWTH SECTORS

The principal business generation organization in Broward County is the Broward Alliance which focuses on the attraction and retention of business for the County. This organization prepares analyses of the business trends on a national scale as well as those that impact South Florida. The analysis also identifies those industries that best fit with Broward County based on our resources and abilities.

The Broward Alliance has identified 13 industries that are most important to Broward County. These industries are the ones that will provide the best long-term growth in our economy. The industries are:

1. Telecommunications and Technology Manufacturing and Services
2. Biomedical Research and Health Services
3. Film and Television
4. Business and Professional Services
5. Publishing and Printing
6. Manufacturing
7. Aviation and Aerospace
8. Marine and Maritime
9. Hospitality and Entertainment
10. Transportation and Distribution
11. Finance and Insurance
12. Development and Construction
13. Environment Related

Of these industries, seven are directly related to Davie through programs offered at the Educational Center and other private businesses. These industries and their relationship to Davie are:

- Telecommunications and Technology Manufacturing and Services – Nova (Internet Coast, McFatter (Network Support Services)
- Biomedical Research and Health Services – Andrx (Pharmaceutical Research and Production), Nova (Health Professions Division), University of Florida (Institute of Food and Agricultural Sciences) and McFatter (Medical Services Training)
- Film and Television – Broward County Schools (Educational/Public Service Channel) and McFatter (Television Production)
- Business and Professional Services – Nova (Graduate Business Programs) and McFatter (Administrative Assistant Program)
- Marine and Maritime – Nova (South Florida Ocean Measurement Center) and McFatter (Marine Welding and Services Technology Program and Precision Machining Program), several yacht builders.
- Hospitality and Entertainment – McFatter (Chef Program)
- Environment Related - Nova (South Florida Ocean Measurement Center), Nova/USGS (South Florida and Caribbean Cooperative Ecosystem Studies Unit), Nova/University of Florida/Florida Atlantic University (South Florida Science Center)

This listing of activities underscores the importance of Davie to the economic growth of Broward County. The activities described here are also important to Davie Road, since the location of the activity is adjacent to the corridor.