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March 27, 2009

Dear Albuquerque Retail Task Force Member,

Thank you for accepting my invitation to participate on the City of Albuquerque Retail Task Force. Your expertise on this matter is greatly appreciated. The task force's first meeting is April 1st, 2009, 8:00 AM at the West Mesa Community Center located at 5500 Glenrio Rd NW. See the attached map for directions. Breakfast burritos, donuts, coffee and juice will be served

Included with this letter are demographic and zoning information from City records, and the United States Census. These maps and tables provide a background about four areas of interest; the Southwest Mesa of Albuquerque, Downtown, Central Avenue east of Moon Street (East Gateway), and aging strip retail malls throughout the City.

During the meeting we will ask the task force members to:

- Describe deficiencies and identify solutions for the provision of retail services in these areas.
- Identify the gap between the type and quality of retail that exists as compared to the services that are needed or preferred.
- We will also seek information on solutions for either sustaining aging strip malls or providing an alternative land use for these sites.

If you have any questions please contact Elaine Romero, Policy Analyst District 1 at 768-3183 or Tom Menicucci of City Council Staff at 768-3126.

Sincerely;

Ken Sanchez.
City Councilor, District 1.

CITY of ALBUQUERQUE

EIGHTEENTH COUNCIL

COUNCIL BILL NO. F/S R-08-119 ENACTMENT NO. _____

SPONSORED BY: Ken Sanchez

1 RESOLUTION
2 REQUIRING A STUDY TO OBTAIN DATA ON FACTORS RELATED TO RETAIL
3 DEVELOPMENT, REVIEW THE DATA AND PROVIDE RECOMMENDATIONS TO
4 PROMOTE A FAVORABLE ENVIRONMENT FOR RETAIL DEVELOPMENT;
5 PROVIDING FUNDING.

6 WHEREAS, sustainable development requires a balanced mix of land uses,
7 so that citizens' necessary daily travel is not excessive; and

8 WHEREAS, various areas of the City differ in the degree of retail
9 development available to their residents.

10 BE IT RESOLVED BY THE COUNCIL, THE GOVERNING BODY OF THE CITY OF
11 ALBUQUERQUE:

12 Section 1. The City Council Staff shall conduct a study that
13 develops data related to retail development in Albuquerque. The data
14 collection shall include the following information:

- 15 a. Proximity/accessibility to Activity Centers;
- 16 b. Proximity/accessibility to freeway interchanges;
- 17 c. Proximity/accessibility to major intersections;
- 18 d. Proximity/accessibility to major arterials;
- 19 e. Availability of water and sewer;
- 20 f. Development costs (including impact fees);
- 21 g. Number of building permits issued by type;
- 22 h. Square footage of building permits issued by type;
- 23 i. The year(s) surrounding housing was built;
- 24 j. Median income of surrounding housing;
- 25 k. Area crime statistics;
- 26 l. Residential growth 5 to 10 years prior to base year; and

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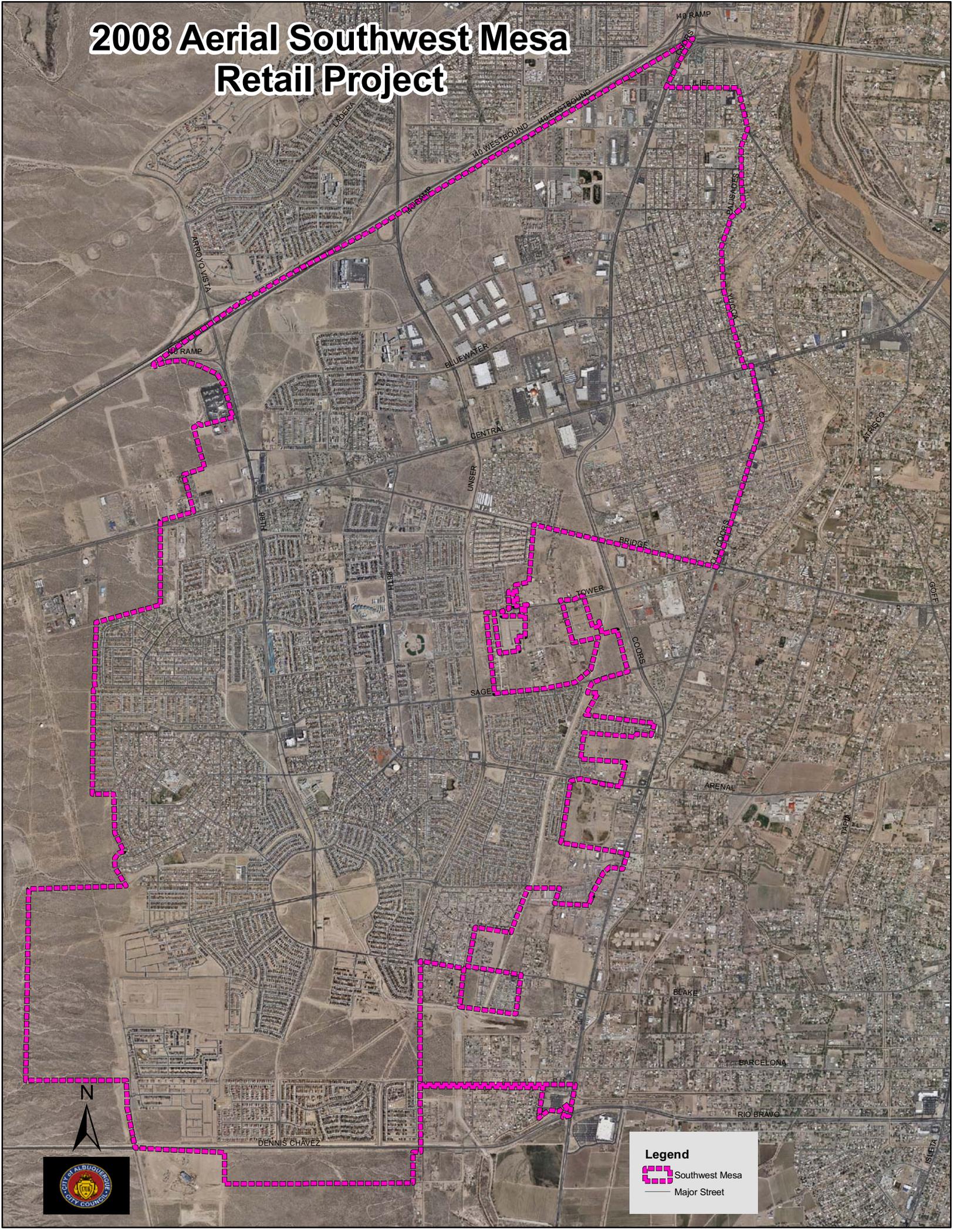
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1 m. Job growth 5 to 10 years prior to base year.
2 (A table identifying the sources of the data is presented in Exhibit A.)
3 Section 2. City Council Staff shall assemble a small local resource
4 group of commercial developers, representatives for large national retail
5 stores, two members of the community and four Councilors (or their
6 appointed representatives) – two with West side districts, two with East side
7 districts. This local resource group shall review the data developed by staff
8 and provide expertise on the barriers to retail development that exist in
9 various areas of the City, the threshold market requirements for retail
10 development to take place, and the general financial pro forma applied to retail
11 development decisions.

12 The local resource group shall also identify a national retail expert to
13 review, assess and advise the Council on methods to assure a favorable retail
14 development environment, by location, in the City. The expert is to examine
15 the data assembled, other data that he/she may require, and provide his/her
16 opinion on how to assure a favorable environment for retail development in
17 the City. Council staff shall then present recommendations to Councilors to
18 obtain direction for drafting legislation to implement those recommendations.

19 Section 3. FUNDING. Up to fifty thousand dollars (\$50,000) of the
20 funding in the City Council Projects activity fund is designated to carry out the
21 study called for in this resolution.
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2008 Aerial Southwest Mesa Retail Project

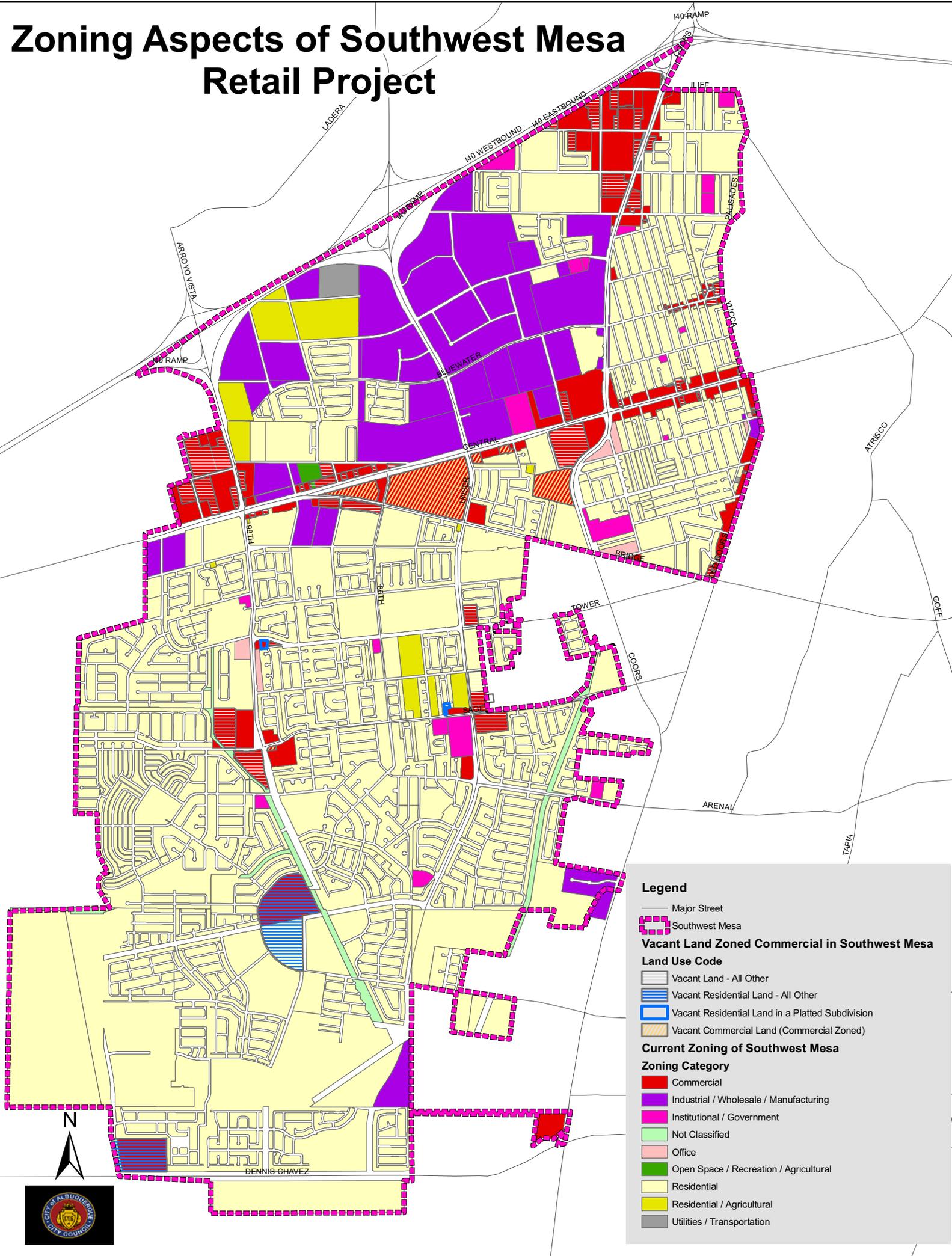


Legend

-  Southwest Mesa
-  Major Street



Zoning Aspects of Southwest Mesa Retail Project



Legend

- Major Street
- ⬡ Southwest Mesa

Vacant Land Zoned Commercial in Southwest Mesa

Land Use Code

- Vacant Land - All Other
- ▨ Vacant Residential Land - All Other
- ▨ Vacant Residential Land in a Platted Subdivision
- ▨ Vacant Commercial Land (Commercial Zoned)

Current Zoning of Southwest Mesa

Zoning Category

- ▨ Commercial
- ▨ Industrial / Wholesale / Manufacturing
- ▨ Institutional / Government
- Not Classified
- ▨ Office
- ▨ Open Space / Recreation / Agricultural
- ▨ Residential
- ▨ Residential / Agricultural
- ▨ Utilities / Transportation



2008 Aerial of Downtown Retail Project



LOMAS

MARQUETTE

TIJERAS

COPPER

CENTRAL

GOLD

LEAD

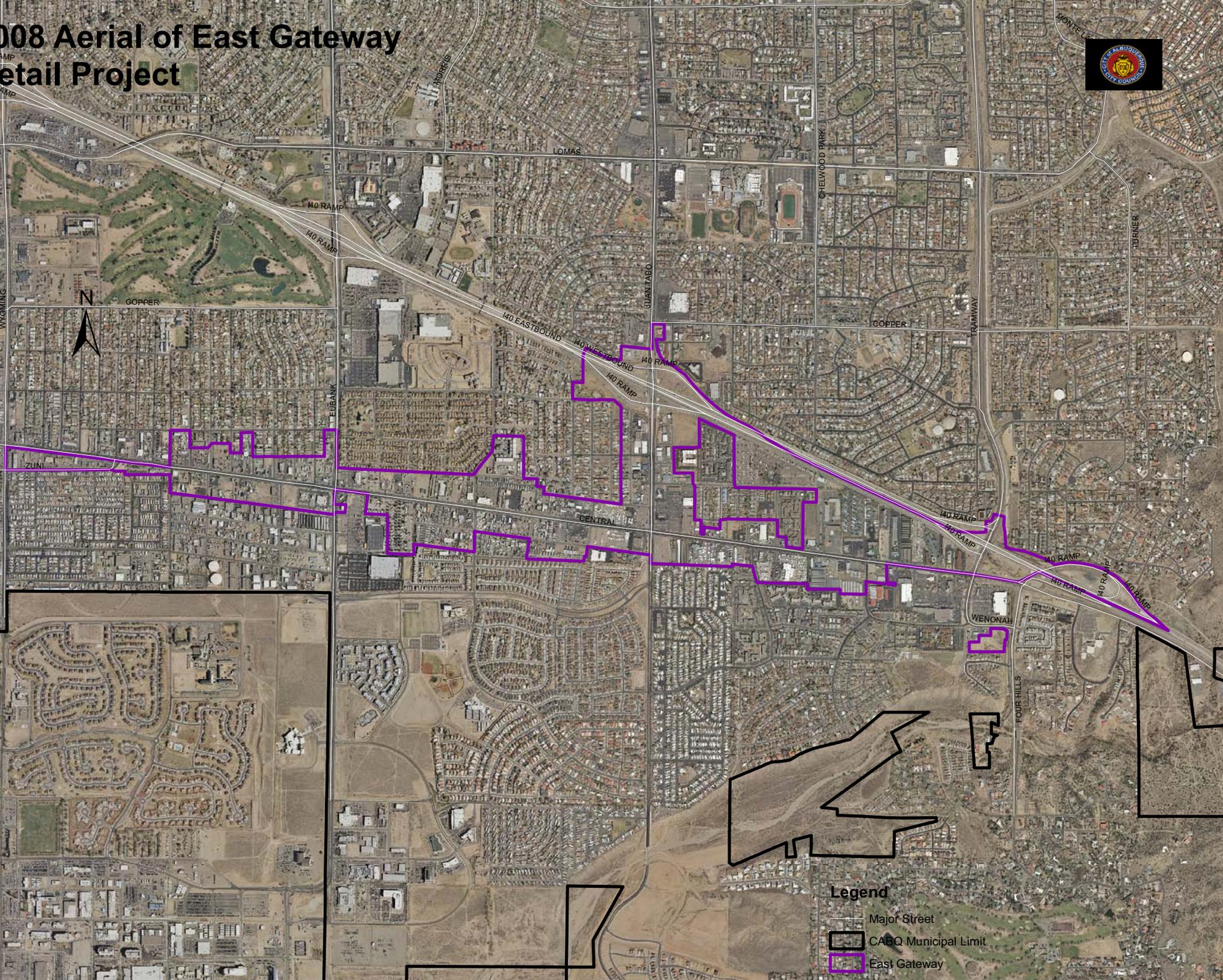
GRAND

MARTIN LUTHER KING

PARK

N

2008 Aerial of East Gateway Retail Project



Legend

- Major Street
- CA&Q Municipal Limit
- East Gateway



2008 Aerial of Commercial Strip Menaul between San Mateo and San Pedro Retail Project



Legend

-  Major Street
-  Commercial Strip

2008 Aerial of Eubank and Candelaria Retail Project



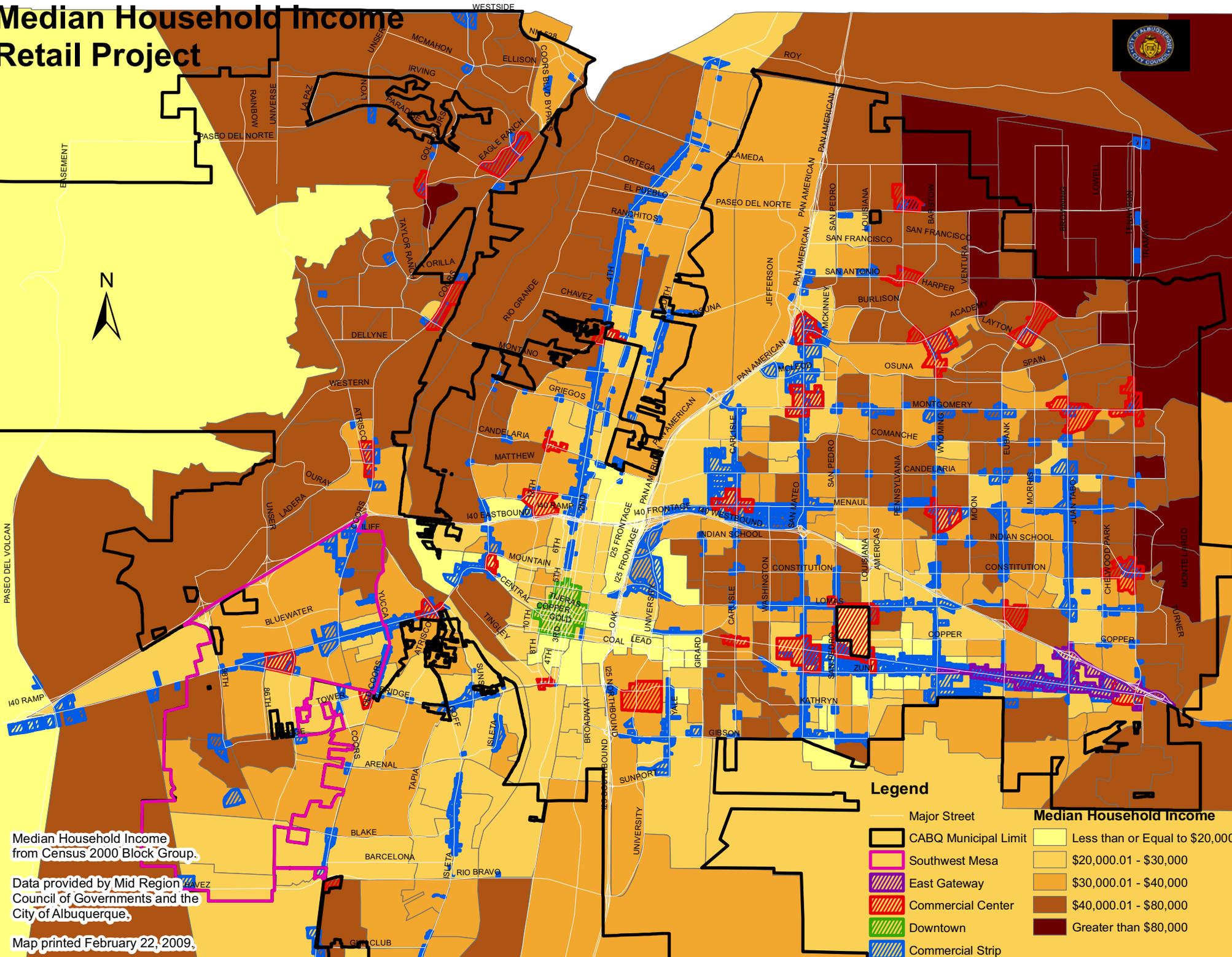
CANDELARIA

EUBANK

2008 Aerial of Mountain Run Shopping Center Retail Project



Median Household Income Retail Project



Median Household Income from Census 2000 Block Group.

Data provided by Mid Region Council of Governments and the City of Albuquerque.

Map printed February 22, 2009.

Legend

- | | |
|-------------------|--------------------------------|
| Major Street | Less than or Equal to \$20,000 |
| Southwest Mesa | \$20,000.01 - \$30,000 |
| East Gateway | \$30,000.01 - \$40,000 |
| Commercial Center | \$40,000.01 - \$80,000 |
| Downtown | Greater than \$80,000 |
| Commercial Strip | |

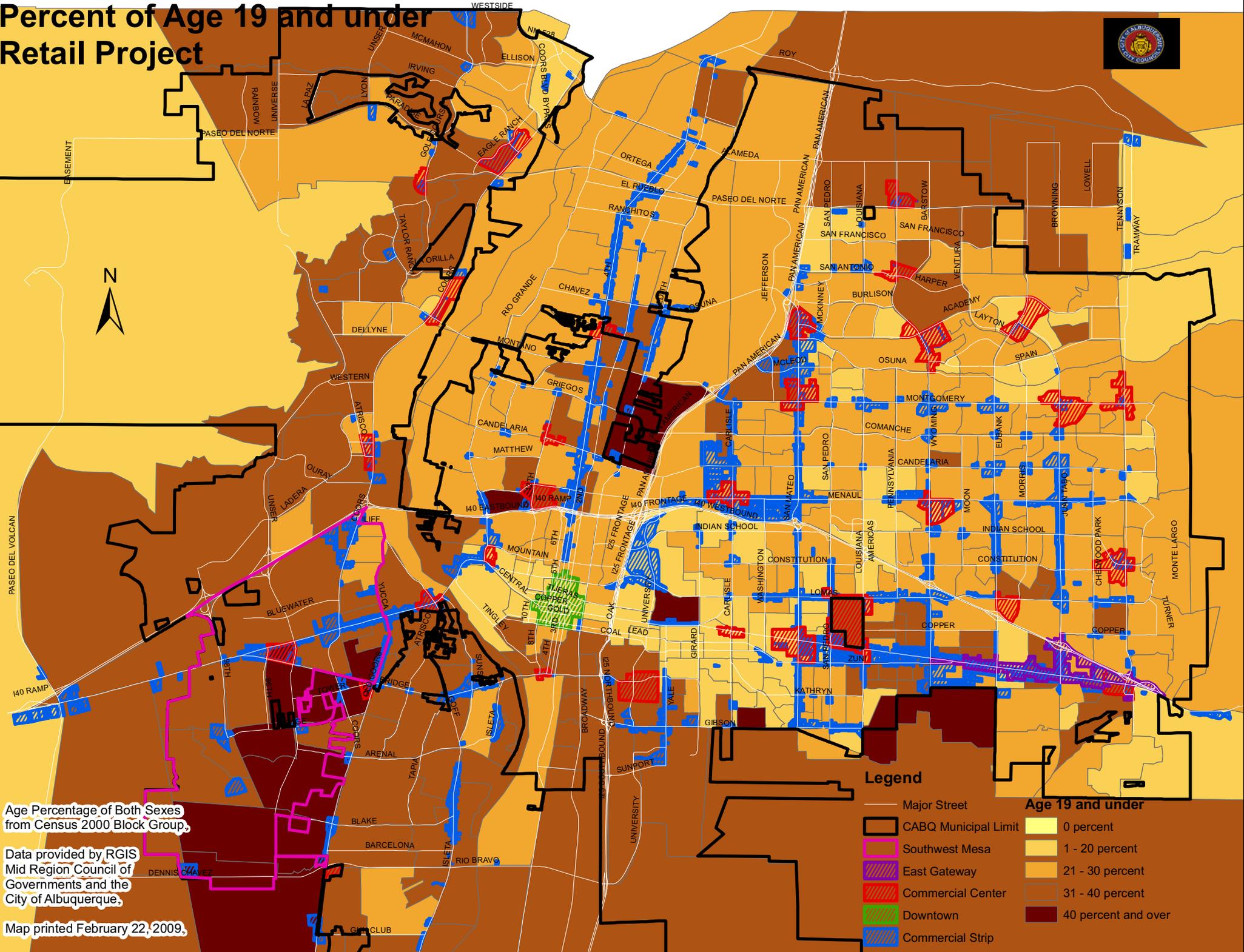
Percent of Age 19 and under Retail Project



Age Percentage of Both Sexes
from Census 2000 Block Group.

Data provided by RGIS
Mid Region Council of
Governments and the
City of Albuquerque.

Map printed February 22, 2009.



Legend

- Major Street
 - ▬ CABQ Municipal Limit
 - ▨ Southwest Mesa
 - ▨ East Gateway
 - ▨ Commercial Center
 - ▨ Downtown
 - ▨ Commercial Strip
- | Age 19 and under | |
|------------------|---------------------|
| Lightest Yellow | 0 percent |
| Light Yellow | 1 - 20 percent |
| Yellow-Orange | 21 - 30 percent |
| Orange | 31 - 40 percent |
| Dark Orange | 40 percent and over |

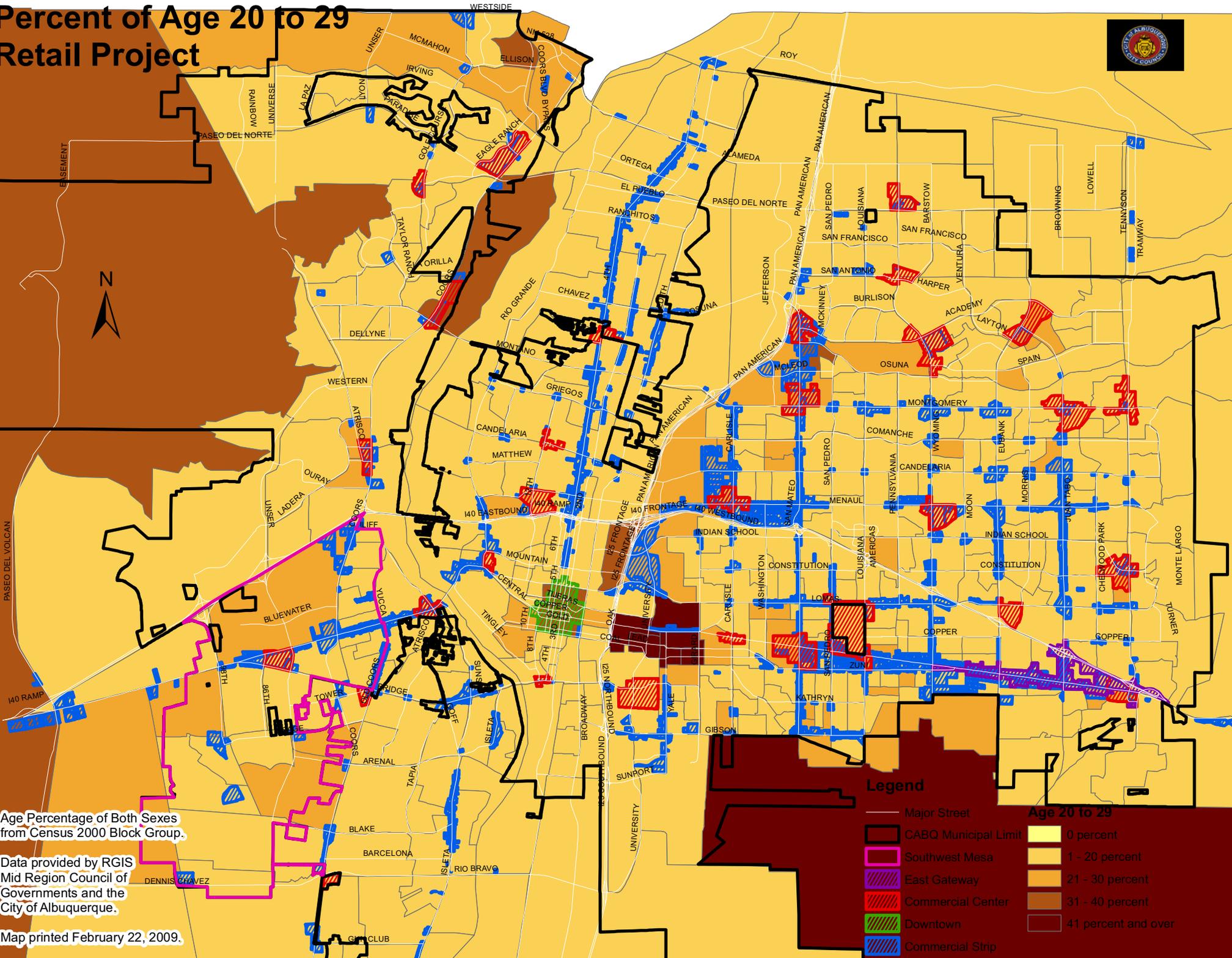
Percent of Age 20 to 29 Retail Project



Age Percentage of Both Sexes
from Census 2000 Block Group.

Data provided by RGIS
Mid Region Council of
Governments and the
City of Albuquerque.

Map printed February 22, 2009.



Legend

- Major Street
 - CABQ Municipal Limit
 - Southwest Mesa
 - East Gateway
 - Commercial Center
 - Downtown
 - Commercial Strip
- | Age 20 to 29 | |
|--------------|---------------------|
| | 0 percent |
| | 1 - 20 percent |
| | 21 - 30 percent |
| | 31 - 40 percent |
| | 41 percent and over |

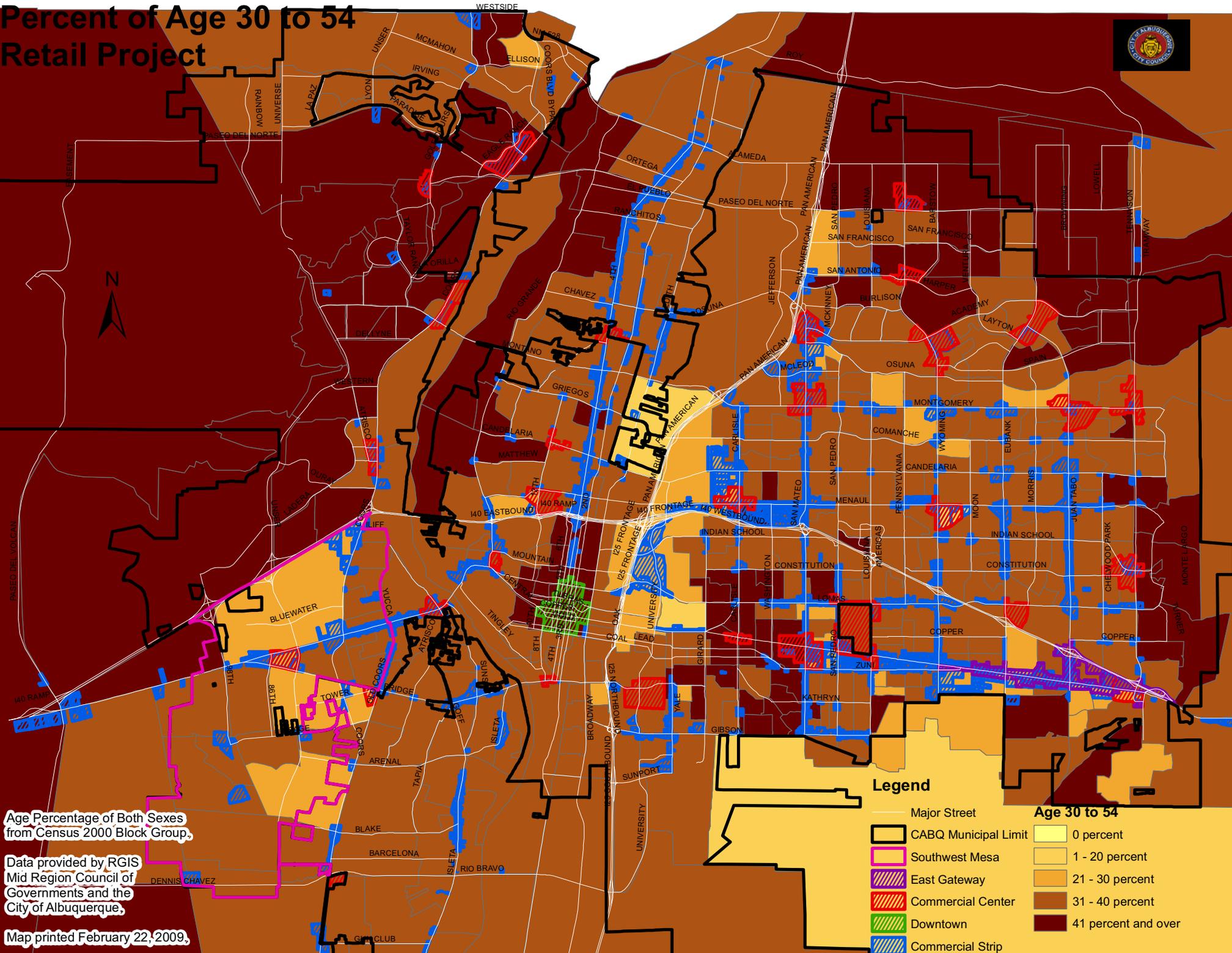
Percent of Age 30 to 54 Retail Project



Age Percentage of Both Sexes
from Census 2000 Block Group.

Data provided by RGIS
Mid Region Council of
Governments and the
City of Albuquerque.

Map printed February 22, 2009.



Legend

- Major Street
 - CABQ Municipal Limit
 - Southwest Mesa
 - East Gateway
 - Commercial Center
 - Downtown
 - Commercial Strip
- | Age 30 to 54 | |
|--------------|---------------------|
| | 0 percent |
| | 1 - 20 percent |
| | 21 - 30 percent |
| | 31 - 40 percent |
| | 41 percent and over |

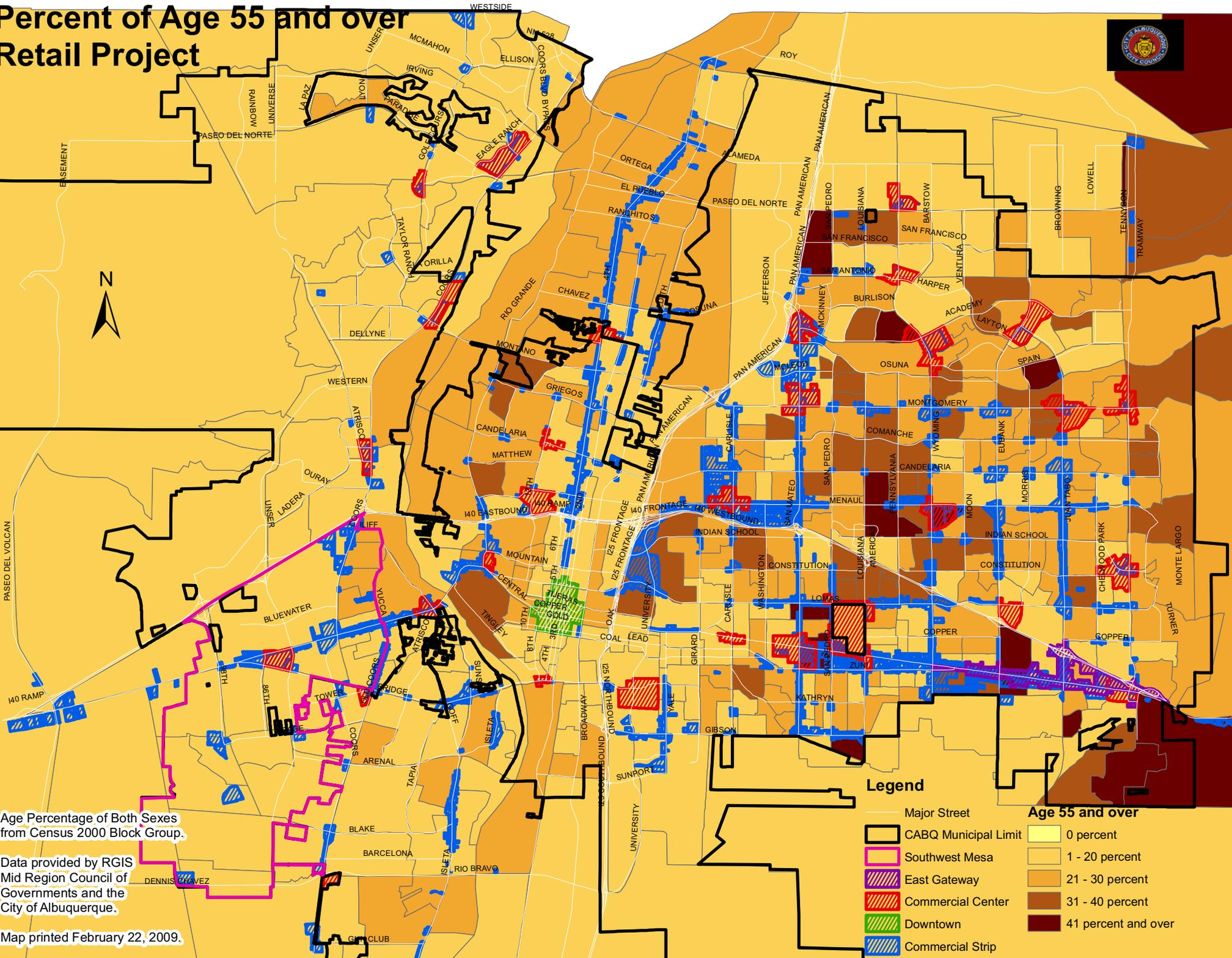
Percent of Age 55 and over Retail Project



Age Percentage of Both Sexes
from Census 2000 Block Group.

Data provided by RGIS
Mid Region Council of
Governments and the
City of Albuquerque.

Map printed February 22, 2009.

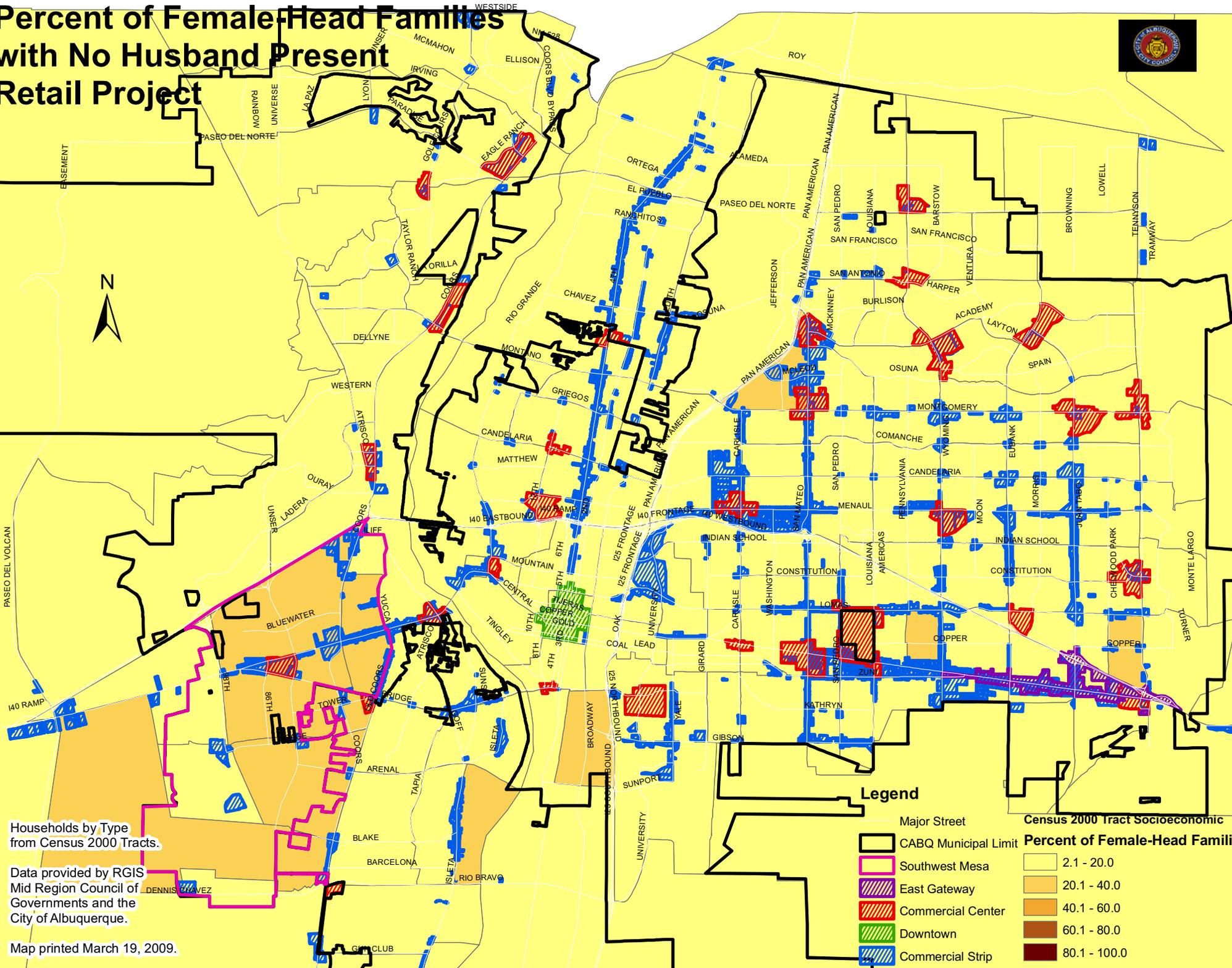


Legend

- | | |
|----------------------|---------------------|
| Major Street | 0 percent |
| CABQ Municipal Limit | 1 - 20 percent |
| Southwest Mesa | 21 - 30 percent |
| East Gateway | 31 - 40 percent |
| Commercial Center | 41 percent and over |
| Downtown | |
| Commercial Strip | |

Percent of Female-Head Families with No Husband Present

Retail Project



Households by Type from Census 2000 Tracts.

Data provided by RGIS Mid Region Council of Governments and the City of Albuquerque.

Map printed March 19, 2009.

Legend

- CABQ Municipal Limit
 - Southwest Mesa
 - East Gateway
 - Commercial Center
 - Downtown
 - Commercial Strip
 - Major Street
- | Census 2000 Tract Socioeconomic Percent of Female-Head Families | |
|---|--------------|
| | 2.1 - 20.0 |
| | 20.1 - 40.0 |
| | 40.1 - 60.0 |
| | 60.1 - 80.0 |
| | 80.1 - 100.0 |

Percent of Households that are Married-Couple Families

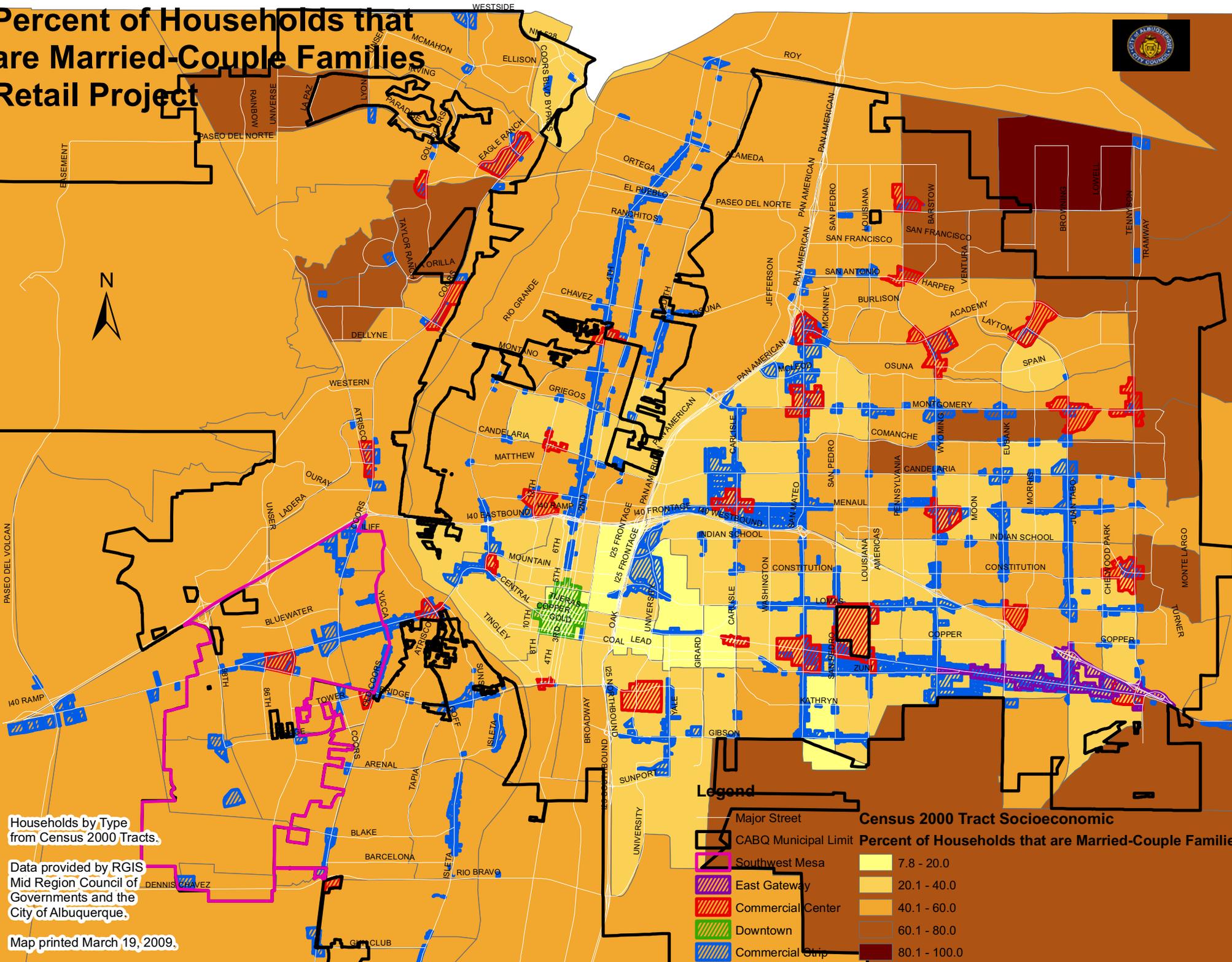
Retail Project



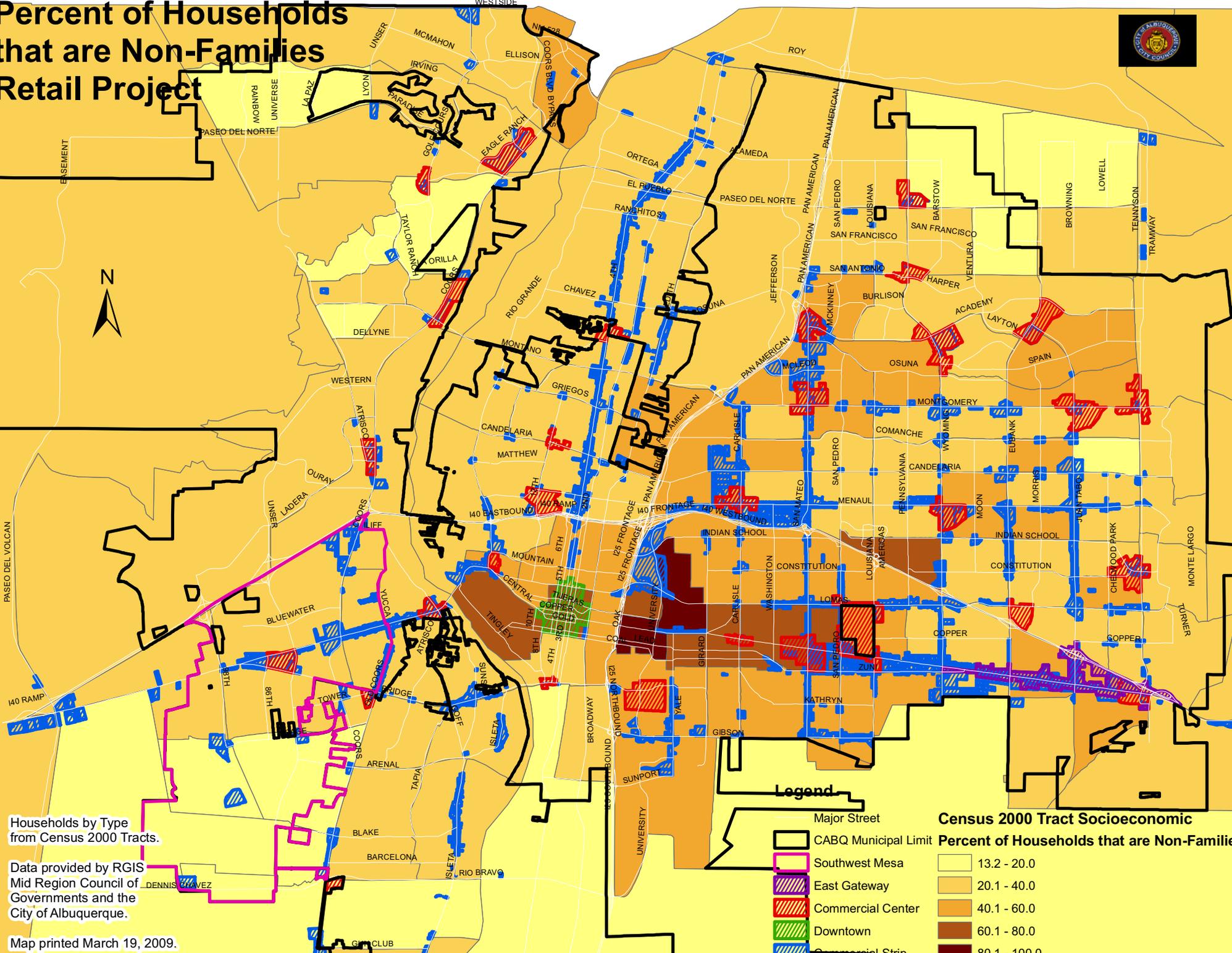
Households by Type from Census 2000 Tracts.

Data provided by RGIS Mid Region Council of Governments and the City of Albuquerque.

Map printed March 19, 2009.



Percent of Households that are Non-Families Retail Project



Households by Type
from Census 2000 Tracts.

Data provided by RGIS
Mid Region Council of
Governments and the
City of Albuquerque.

Map printed March 19, 2009.

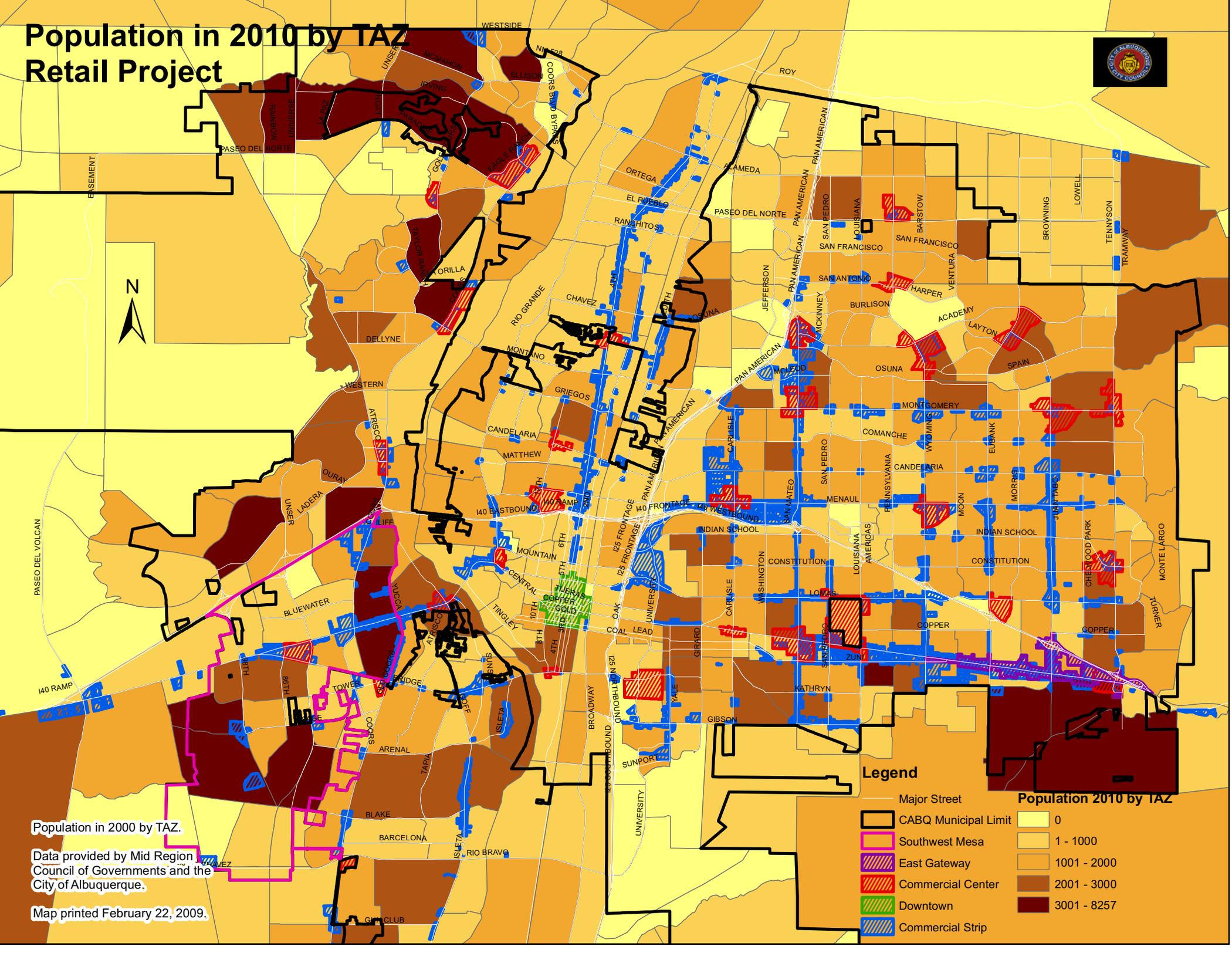
Legend

- Major Street
- CABQ Municipal Limit
- Southwest Mesa
- East Gateway
- Commercial Center
- Downtown
- Commercial Strip

Census 2000 Tract Socioeconomic Percent of Households that are Non-Families

	13.2 - 20.0
	20.1 - 40.0
	40.1 - 60.0
	60.1 - 80.0
	80.1 - 100.0

Population in 2010 by TAZ Retail Project



Population Change from 2000 to 2010 by TAZ

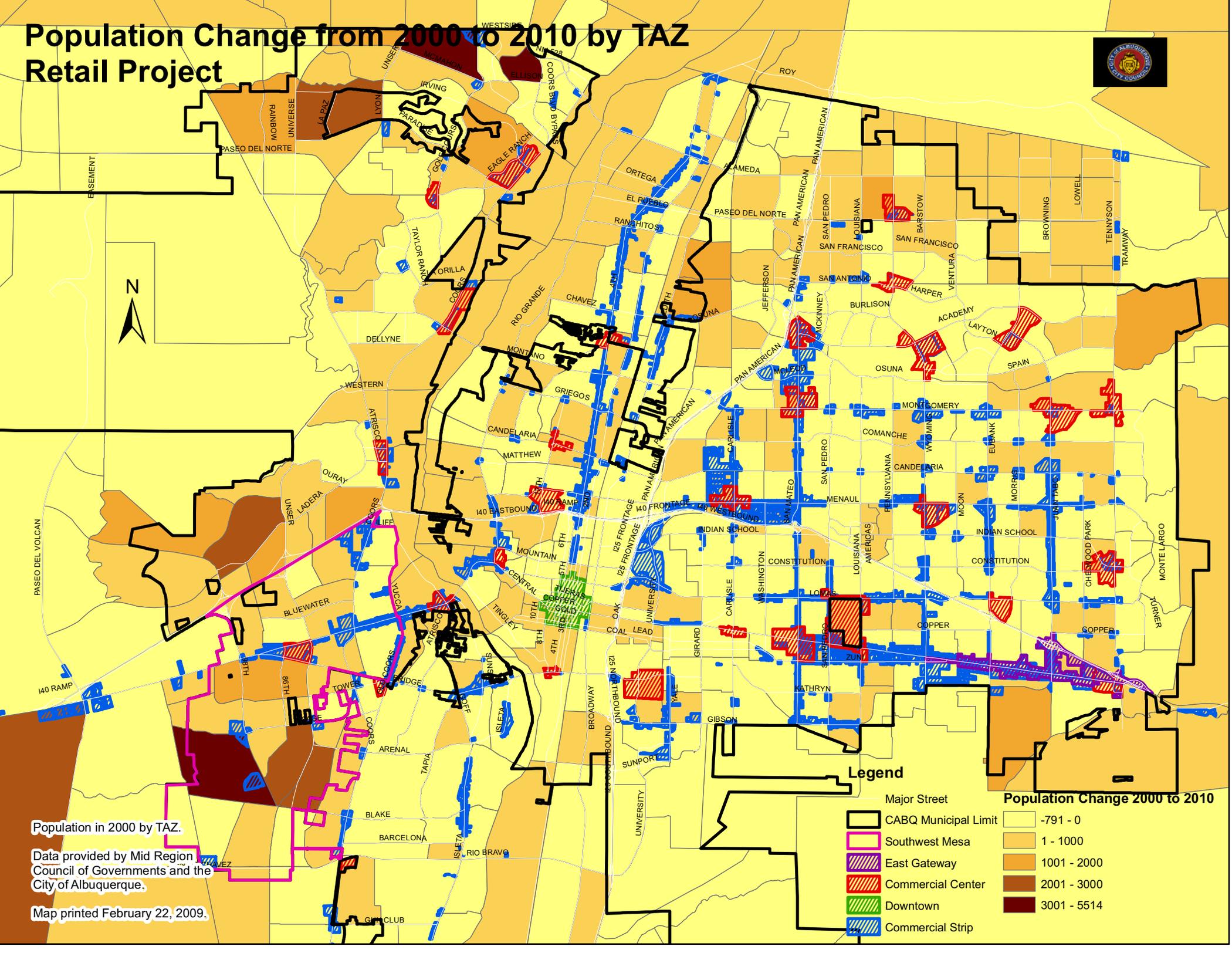
Retail Project



Population in 2000 by TAZ.

Data provided by Mid Region Council of Governments and the City of Albuquerque.

Map printed February 22, 2009.



Legend

- | | |
|----------------------|-------------|
| CABQ Municipal Limit | -791 - 0 |
| Southwest Mesa | 1 - 1000 |
| East Gateway | 1001 - 2000 |
| Commercial Center | 2001 - 3000 |
| Downtown | 3001 - 5514 |
| Commercial Strip | |

Top 50 Business Categories by SIC Description and Their Frequency in 2007 for each Study Area									
Commercial Centers		Commercial Strips		Southwest Mesa		East Gateway		Downtown	
Count	SIC Description	Count	SIC Description	Count	SIC Description	Count	SIC Description	Count	SIC Description
184	Restaurants	466	Restaurants	36	Restaurants	23	Restaurants	222	Attorneys
82	Real Estate	214	Beauty Salons	24	Churches	12	Hotels & Motels	63	Government Offices-City, Village & Twp
77	Insurance	201	Insurance	24	Nonclassified Establishments	11	Automobile Repairing & Service	52	Nonclassified Establishments
60	Beauty Salons	144	Nonclassified Establishments	21	Child Care Service	9	Automobile Dealers-Used Cars	41	Government Offices-Indian
50	Real Estate Loans	121	Automobile Repairing & Service	17	Hotels & Motels	8	Recreational Vehicles	38	Government Offices-US
43	Nonclassified Establishments	109	Attorneys	15	Home Builders	7	Insurance	36	Restaurants
36	Attorneys	106	Automobile Dealers-Used Cars	13	Apartments	7	Mobile Homes-Dealers	30	Police Departments
36	Banks	105	Real Estate	13	Automobile Dealers-Used Cars	6	Automobile Body-Repairing & Painting	27	Government Offices-State
36	Gift Shops	74	Real Estate Loans	13	General Contractors	6	Storage-Household & Commercial	21	Government Offices-County
32	Art Galleries & Dealers	73	Hotels & Motels	13	Insurance	5	Nonclassified Establishments	17	Escort Service-Personal
28	Dentists	72	Loans	12	Janitor Service	5	Truck Renting & Leasing	14	Architects
28	Loans	71	Physicians & Surgeons	12	Schools	5	Wrecker Service	10	Radio Stations & Broadcasting Companies
28	Manicuring	67	Service Stations-Gasoline & Oil	11	Beauty Salons	4	General Contractors	10	Real Estate Management
28	Physicians & Surgeons	61	Banks	10	Storage-Household & Commercial	4	Jewelry-Manufacturers	9	Art Galleries & Dealers
26	Accountants	60	Accountants	10	Trucking	4	Mobile Homes-Park Developers	9	Banks
25	Apartments	58	Convenience Stores	8	Real Estate	3	Automobile Parts & Supplies-Retail-New	9	Bonds-Bail
25	Grocers-Retail	58	Manicuring	7	Dentists	3	Electric Contractors	9	Business Management Consultants
24	Cleaners	56	Churches	7	Landscape Contractors	3	Recreational Vehicles-Repairing & Svc	9	County Government-Finance & Taxation
22	Hotels & Motels	55	Automobile Body-Repairing & Painting	7	Retail Shops	2	Air Conditioning Systems-Cleaning	9	Federal Government-Courts
21	Cellular Telephones (Services)	53	Tax Return Preparation & Filing	6	Carpet & Rug Cleaners	2	Antiques-Dealers	9	Real Estate
21	Pizza	49	Massage Therapists	6	Glass-Auto Plate & Window & Etc	2	Architects	9	State Government-Courts
18	Indian Goods	47	Cleaners	6	House Cleaning	2	Artists-Fine Arts	8	Associations
18	Pharmacies	46	Storage-Household & Commercial	6	Mobile Homes-Park Developers	2	Attorneys	8	Beauty Salons
18	Tax Return Preparation & Filing	45	Barbers	6	Service Stations-Gasoline & Oil	2	Beauty Salons	8	Federal Government-National Security
17	Shoes-Retail	44	Grocers-Retail	6	Tax Return Preparation & Filing	2	Bingo Games	8	Real Estate Loans
16	Churches	44	Marriage & Family Counselors	6	Trucking-Motor Freight	2	Ceramic Equipment & Supplies	8	Sheriff
16	Jewelers-Retail	41	Chiropractors DC	5	Attorneys	2	Construction-Heavy Projects	7	Federal Government-Conservation Depts
16	Women's Apparel-Retail	41	Dentists	5	Automobile Body-Repairing & Painting	2	Convenience Stores	7	Financial Advisory Services
15	Service Stations-Gasoline & Oil	41	General Contractors	5	Automobile Detail & Clean-Up Service	2	Financial Advisory Services	7	Government-Forestry Services
14	Chiropractors DC	39	Pizza	5	Cellular Telephones (Services)	2	Indian Goods-Wholesale	7	Non-Profit Organizations
14	Convenience Stores	38	Check Cashing Service	5	Concrete Contractors	2	Jewelers-Wholesale	7	Secretarial & Court Reporting Services
14	Financial Advisory Services	36	Automobile Parts & Supplies-Retail-New	5	Grocers-Retail	2	Liquors-Retail	6	Advertising-Agencies & Counselors
14	Marriage & Family Counselors	36	Child Care Service	5	Handyman Services	2	Motor Homes-Renting & Leasing	6	Churches
14	Real Estate Investments	35	Cellular Telephones (Services)	5	Manicuring	2	Pizza	6	Real Estate Developers
13	Furniture-Dealers-Retail	35	Tire-Dealers-Retail	5	Music & Live Entertainment	2	Radio Communication Equip & Systems-Whol	6	Real Estate Investments
13	Massage Therapists	33	Furniture-Dealers-Retail	5	Painters	2	Recreational Vehicles-Storage	5	Accountants
13	Variety Stores	33	Martial Arts Instruction	5	Pizza	2	Roofing Contractors	5	Bars
12	Department Stores	29	Acupuncture	5	Plumbing Contractors	2	Service Stations-Gasoline & Oil	5	Credit Unions
12	Health Clubs Studios & Gymnasiums	29	Shoes-Retail	4	Automobile Parts & Supplies-Retail-New	2	Tree Service	5	Federal Government-Police
12	Ice Cream Parlors	28	Health Clubs Studios & Gymnasiums	4	Cleaners	2	Variety Stores	5	Fire Departments
12	Optometrists OD	27	Jewelry-Manufacturers	4	Construction-Heavy Projects	1	Accountants	5	Hotels & Motels
11	Automobile Repairing & Service	27	Pharmacies	4	Convenience Stores	1	Appliances-Household-Major-Repairing	5	Insurance
11	Business Management Consultants	26	Gift Shops	4	Government-Individual/Family Social Svcs	1	Arbitration Services	5	Physicians & Surgeons
11	Government Offices-Indian	26	Printers (Mfrs)	4	Halls & Auditoriums	1	Army & Navy Goods	5	Social Service & Welfare Organizations
11	Home Builders	25	Variety Stores	4	Home Improvements	1	Automobile Alarms	5	Title Companies
10	Associations	24	Business Management Consultants	4	Lawn & Grounds Maintenance	1	Automobile Auctions (Wholesale)	4	Automobile Repairing & Service
10	Clothing-Retail	23	Automobile Dealers-New Cars	4	Marriage & Family Counselors	1	Automobile Detail & Clean-Up Service	4	Bus Lines
10	Video Tapes & Discs-Renting & Leasing	23	Florists-Retail	4	Paving Contractors	1	Automobile Electric Service	4	Communications
9	Automobile Dealers-Used Cars	23	Plumbing Contractors	4	Physicians & Surgeons	1	Automobile Racing Car Equipment	4	Employment Contractors-Temporary Help
9	Check Cashing Service	23	Real Estate Investments	4	Roofing Contractors	1	Automobile Radio & Stereo Svcs-Sls/Svc	4	Environmental & Ecological Services

Red indicates Business SIC Description is in the top 10 of all Study Areas.

Orange indicates Business SIC Description is in the top 10 of four Study Areas.

Blue indicates Business SIC Description is in the top 10 of three Study Areas.

Developers Perspective of Factors that Determine when and if a Parcel would be Developed.

- Based upon Mid-Region Council of Government (MRCOG) report:
 - *Overview of the Calibration of Scoring Layer Equations for the Land Use Allocation Model (LAM)*
- MRCOG assessed the allocating equations in original LAM.
- Holding a series of meetings with developers in the summer of 2003 was part of the assessment.
- The following represents the Commercial sector of development that was discussed with MRCOG.

Major Retail

(retail center with minimum of 100,000 sq. ft.)

- New retail employment locates in areas with:
 - **Employment growing.**
 - Area popularity. Where new businesses succeed others may find the same attractors.
 - **Population growth has occurred for a period of time.**
 - Significant new housing 5 to 10 years prior.
 - Time lag for sufficient housing units to justify retail development.
 - **Access to freeway and major intersections.**

Mixed Commercial Employment

(retail centers less than 100,000 sq. ft. and commercial strips along roadways)

- **Accessibility to population**
 - Developers mentioned that businesses that are selling or serving local needs seek to be close to a customer base or user base.
 - Ideally, a base with significant disposable income.
- **High traffic counts**
- **New population**
 - Residence
 - Time lag for sufficient housing units to justify retail development.
 - Employees of business
- **Areas inside or close to activity areas**
 - Employment areas tend to attract more employment and activity centers.

Office

(office complexes with minimum of 100,000 sq. ft. or stand alone buildings of at least 50,000 sq. ft.)

- **Access to location**
 - Major intersections
 - Freeway interchanges
- **Labor pool**
- **Amenities**
- **Utilities**
 - Water and sewer access

Industrial

(includes manufacturing, warehousing, and similar types of uses such as construction yards)

- **Access to freeway interchanges.**
- **Rail access is still important for some industries.**
 - Industrial developers said that rail sidings are a plus for industries that can benefit from shipping by rail.
- **Industrial Strength Utilities.**
 - Electricity
 - Communication
- **Would avoid high income areas in developed areas due to zoning and high cost of land.**