

CityReport

The Storefront Index



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April 2016

Executive Summary

In cities around the nation, neighborhood business areas—downtowns, main streets and shopping districts—are important public spaces where Americans work, shop, and interact. They are in important ways the heart of their communities. We've created the Storefront Index as a means to measure the presence and density of destinations that contribute strongly to the economic and social fabric of an area. When clustered together, these customer-facing retail and service businesses—think retail stores, restaurants and beauty shops—shape walkability, activate connecting public spaces (especially the streetscape) and make cities better places to live and work.

The advantages of cities in providing for efficient, convenient and diverse consumption opportunities are increasingly being recognized as a key economic advantage. The “consumer city” view holds that households—especially dual-earner households—derive great value from the variety of goods and services available in dense cities and that because of competition, variety, and travel savings, the prices of goods and services are actually lower in cities than elsewhere.

In addition to providing consumers with choices, the presence, number, and size of storefront businesses in a neighborhood is a new, key indicator of urban economic health and neighborhood vitality.

Storefront clusters are closely correlated to walkability. Because strong clusters of businesses encourage pedestrian activity, help activate nearby public spaces

and provide the “eyes on the street” that reduce crime. And storefront businesses are an important source of employment, frequently offering entry-level jobs for neighborhood residents.

The concentration of storefront businesses varies substantially among urban centers in the United States. Some cities have dense, widespread concentrations of storefront businesses in their urban cores (New York, Philadelphia, San Francisco), while others have relatively few storefront clusters in and near their downtown areas, or have large areas with no storefront clusters (Detroit, Oklahoma City, St. Louis).

Changes in the concentration of storefront businesses in a neighborhood are an important indicator of neighborhood health. To illustrate this, we mapped neighborhood change over an 18-year period in Portland's Alberta Street neighborhood using the Storefront Index, an area that has undergone extensive redevelopment and developed new storefront clusters.

The Storefront Index is a powerful, accessible tool that planners and civic leaders can use to understand the structure and performance of their metropolitan economies on the neighborhood level. The index can be used to plan, benchmark and assess the effectiveness of strategies to bolster neighborhood small business strategies. City Observatory is making the Storefront Index data freely available at its website www.cityobservatory.org/storefront.

Introduction

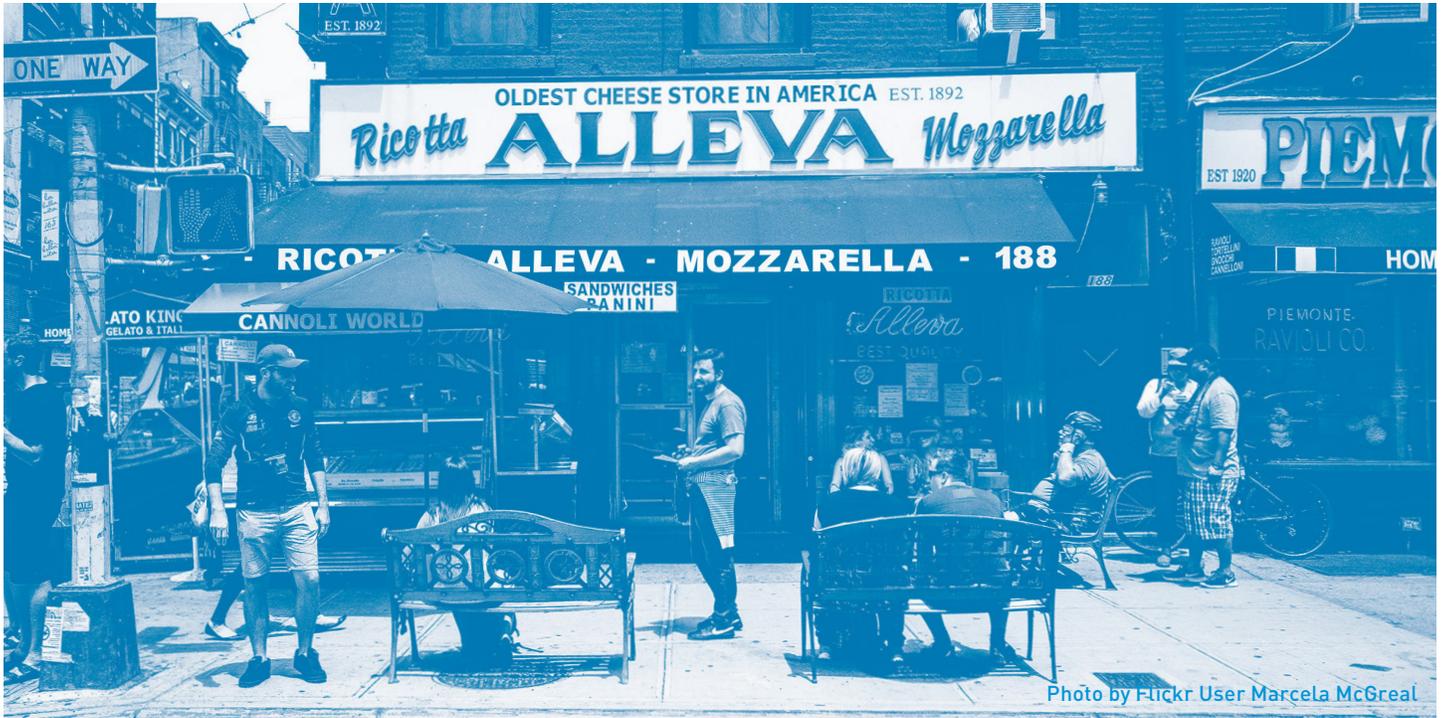


Photo by Flickr User Marcela McGreal

One of the best indicators of the vitality of an urban space is the presence of customer-facing retail and service businesses. A concentration of boutiques, bars and restaurants, apparel and merchandise stores, entertainment venues, art galleries, and the like are the kind of privately-owned but publicly-open spaces that draw people into cities. And the relationship between the city's street life and the storefront business is truly symbiotic: Businesses depend on the city for customers, and the concentration of businesses provides the goods, services, entertainment and experiences that help define city living.

We know that the kind of diverse, interesting and walkable areas that draw customers (and command high rents) have a concentration and array of service and retail businesses.

In addition to providing goods and services, and populating the streetscape of cities, storefront businesses provide another important dimension for cities: jobs. Retail and service businesses are big providers of employment.

What is a storefront business?



Our initial task in creating the Storefront Index was to identify a set of categories of businesses that primarily serve the day-to-day needs of individuals and households, the kind of businesses that people in cities are likely to patronize.

Our list of indicator businesses was chosen to select business establishments that provided goods and services directly to customers—the kind of store or shop that any person might walk into to buy something for their personal, domestic use. We excluded a range of professional services (finance, medical care) and businesses engaged in manufacturing, wholesale and business-to-business

activities (businesses whose clients are primarily other businesses, rather than households).

Nationally, there are about 2.6 million storefront businesses in the United States. They represent about 10 percent of all the nation's business establishments. In the 51 largest metropolitan areas there are about 537,000 such businesses.

Clustering and proximity are critical ingredients to the success of neighborhood commercial districts. In mapping storefront businesses, we've counted only businesses that are within 100 meters of another storefront business; more isolated businesses are

**Table 1: The Storefront Index:
Customer-Facing Business Categories**

Amusement and Recreation
Barber Shops
Beauty Shops
Bookstores
Bowling Centers
Candy, Nut, and Confectionery Stores
Department Stores
Drapery and Upholstery Stores
Drinking Places
Drugstores and Proprietary Stores
Eating Places
Entertainers and Entertainment Groups
Family Clothing Stores
Florists
Fruit and Vegetable Markets
Furniture Stores
Gift, Novelty, and Souvenir Shop
Grocery Stores
Hardware Stores
Hobby, Toy, and Game Shops
Jewelry Stores
Meat and Fish Markets
Membership Sports and Recreation Clubs
Men's and Boys' Clothing Stores
Motion Picture Theaters, Except Drive-In
Museums and Art Galleries
Musical Instrument Stores
Optical Goods Stores
Physical Fitness Facilities
Radio, Television, and Electronic Stores
Record and Prerecorded Tape Stores
Retail Bakeries
Retail Nurseries and Garden Stores
Shoe Repair and Shoeshine Parlors
Shoe Stores
Sporting Goods and Bicycle Shops
Stationery Stores
Used Merchandise Stores
Variety Stores
Video Tape Rental
Women's Clothing Stores

excluded from our counts. We've consciously chosen to compute the Storefront Index based on the number of business establishments, rather than the number of employees in those establishments. We think the number and range of establishments in an area reflects a consumer's view of the variety and depth of goods and services available to them.

Businesses depend on the city for customers and the concentration of businesses provides the goods, services, entertainment and experiences that help define city living.

Why the Consumer City Matters

The Storefront Index is a geographic indicator of the presence and concentration of a wide range of consumer-serving businesses. While the existence of these businesses may seem prosaic at first glance, the clustering of such businesses in cities and within cities, in particular neighborhoods, is an important correlate of what economists are calling the “consumer city.”

Economists have traditionally emphasized the economic advantages of cities as stemming from their benefits in terms of productive efficiency. Workers are more productive in cities, because thick urban labor markets better match workers to jobs and develop workers' skills, with the result that incomes and productivity rise with city size. Cities also facilitate the interactions that lead to new ideas, fueling entrepreneurship. But in recent years, economists are increasingly coming to understand that the advantages that cities provide to consumers also matter to well-being and city economic success.

Cities offer distinct advantages in convenience, variety and the opportunity to discover new goods and services (Cortright, 2007). The density of cities means that more options are closer at hand, and that the amount of time and money that one needs to expend in travel costs to search for and obtain goods and services is less in larger and denser cities. Cities also provide consumers with a wider array of choices—specialty stores and boutiques, ethnic restaurants, and more varied cultural and social opportunities.

The ability to get just the goods and services we want is a key element of our quality of life. Super-model Cindy Crawford—widely under-appreciated for her economic insights—observed: “Arugula is how I define a city; if you can buy arugula, it's a city.” (Gawker.com, 2003). We each have our own special tastes and interests, and having a very diverse array of stores and merchants nearby helps us get just what we want, rather than having to settle for something less.

At a neighborhood level, the presence of a variety of small stores and service businesses contributes to the vibrancy and walkability of the streetscape. As Jane Jacobs famously observed in *The Death and Life of Great American Cities*, the abundance of stores, bars and restaurants draws customers, and creates activity that put “eyes on the street,” in turn making the environment safer and more attractive (Jacobs, 1961). Recent research has shown the fine-grained urban environments, especially those older neighborhoods with a mix of different buildings on a single block and punctuated with multiple doors and storefronts, are particularly conducive to walkability and thriving retail activity (Powe, 2014).

Despite the advent of online shopping and enhanced package delivery, most consumption is place-based. Consumers still regularly travel to shop for a variety of goods and most services, where one must generally be physically present to “consume,” whether it's theatre, a game of tennis, a meal, a round of drinks, or a massage. In fact, a key aspect of much goods

consumption activity is that it is bundled with services and a physical environment that is an intrinsic part of the “value” of the consumption activity: We don’t go to a restaurant simply to ingest calories, but to enjoy the service, appreciate the décor, see others (and be seen) and to “get out of the house.” For a significant subset of the population, shopping is incidental to the more broadly social event of “hanging out at the mall.” Similarly, a nail salon or a barbershop may be a similarly multi-faceted environment that bundles an economic transaction with an enjoyable social experience.

Over the past decade, increasing attention has been focused on the role of cities as places of consumption. Ed Glaeser and his colleagues argued that agglomeration economies associated with consuming were taking on greater importance in explaining urban success (Glaeser & Gottlieb, 2006). The University of Chicago’s Terry Nichols Clark described the city as “an entertainment machine” (Clark, 2002).

A growing number of high-income, low-leisure time workers—especially in well-educated, dual-earner households—have chosen to locate in city centers to minimize time lost to commuting (Edlund, Machado, & Sviatchi, 2015). But more central locations also provide significantly better access to consumption opportunities as well. Dual-earner households may have more income, but less free non-work time, which leads them to put a premium on central city locations where they can easily and quickly satisfy a wide range of consumption choices.

In a very real sense, the price of any good or service is the sum of its retail cash price, and also the time and effort the consumer must spend to search for and obtain the product. Using econometric techniques, it is possible to quantify the dollar value that consumers attach to getting just the level of quality that they seek (not having to settle for a second-best choice) and also to estimate the transaction cost savings associated

Contrary to the accepted wisdom that city prices are higher, as a result of the greater variety of goods and services that are offered in cities, urban consumers actually face lower prices for the goods and services they want to consume.

with lower travel costs implied by a greater variety of retail choices close at hand.

Several studies show that—contrary to the accepted wisdom that city prices are higher than in suburbs or small towns—as a result of the greater variety of goods and services that are offered in cities, urban consumers actually face lower prices for the goods and services they want to consume. Weinstein and Handbury show that consumers in large cities (like New York) have access to three times as many different grocery products than those living in smaller cities (like Des Moines) and as a result that average prices for a basket of consumer goods is 10 percent lower in New York City than in a smaller city like Des Moines (Handbury & Weinstein, 2011). Hottman has undertaken a similar analysis for a range of consumer-packaged goods and finds that variety-adjusted prices for these goods are lower in cities and that retail markups are also lower in large cities (Hottman, 2014).

Couture looks at the number and variety of restaurants available in different neighborhoods in cities, and finds that residents of more centrally

The scale and diversity of retail activity appears to increase in low income neighborhoods that experience economic gains.

located neighborhoods have higher access to a greater variety of choices (Couture, 2013). He shows that variety-adjusted prices for typical urban households are 20 percent less than for households living in peripheral suburbs, with most of the gain accounted for by increased variety, and a lesser amount contributed by travel savings. Cosman finds that consumers place a high value on having access to a variety of nightlife venues (bars, entertainment locales), which leads to business clustering; individual nightlife businesses are more profitable if they are located near other similar businesses because of this effect (Cosman, 2015).

The consumer city is economically important for a number of reasons. Research in progress suggests that the growing demand for urban consumption amenities—cultural attractions, boutiques, restaurants and bars—among the young and well-educated is the chief factor explaining the movement of these groups back to city centers over the past decade or more (Handbury & Couture, 2015). The scale and diversity of retail activity appears to increase in low-income neighborhoods that experience economic gains (Meltzer & Schuetz, 2010).

Cities that provide a dense array of consumer choices reduce travel demand and greenhouse gas production. Proximity plays an important role in consumer choice. An analysis of Yelp user data shows, for example, that consumers tend to frequent restaurants that are closer to home or work locations and are two to four times more likely to visit a venue that is half as far away (Davis, Dingel, Monras, & Morales, 2015). Holian and Kahn look at the relationship between central city amenities and travel behavior and find that households that live in cities with a strong urban core tend to drive less, and that therefore a consumer city is also a green city (Holian & Kahn, 2013).

In effect, the city is an important labor-saving technology. The advent and spread of washing machines, vacuum cleaners, dishwashers and power lawnmowers reduced the amount of time required to undertake routine household tasks—and thereby led to real improvements in living standards (both by enabling greater participation in paid labor and through an increase in time available for leisure activities). Similarly, cities reduce the amount of time households need to spend searching for and traveling to different locations to select, acquire and consume many goods and services.

Our Storefront Index mimics the measurement strategy used in these “consumer city” studies. We map the number and location of a range of consumer-facing businesses—including grocery and drug stores, big box retailers and restaurants. The Storefront Index is also analogous in many ways to Walk Score (www.WalkScore.com). Walk Score is an index of the number of common destinations, including parks, schools and some common businesses within walking distance of a given residential location. Our measure focuses on a subset of businesses and looks primarily at destinations (businesses), rather than focusing on trip origins (home addresses).

Which cities have the most storefront businesses?



The density of storefront businesses varies substantially within and across large cities in the U.S. To illustrate the range of variation, we counted the number of storefront businesses in and near the central business district (CBD) of each of the nation's largest metropolitan areas. We used geographic information system (GIS) software to identify storefront businesses within 100 meters of another storefront business and compute the total number of such businesses within a three-mile radius of the center of the principal CBD in each metropolitan area. Table 2 shows the results.

Not surprisingly, New York City has far and away the largest concentration of storefronts of any city center in the United States—there are more than 9,900 customer-facing businesses within three miles of Times Square. San Francisco's downtown has the next highest concentrations of storefront businesses— with about 5,800 within three miles of its CBD centers. Several other cities—Boston, Chicago, Los Angeles, New Orleans and Philadelphia have more than 2,000 storefront businesses clustered near their central business district.

Table 2: Urban Core Storefront Businesses, Largest Metropolitan Areas, 2014

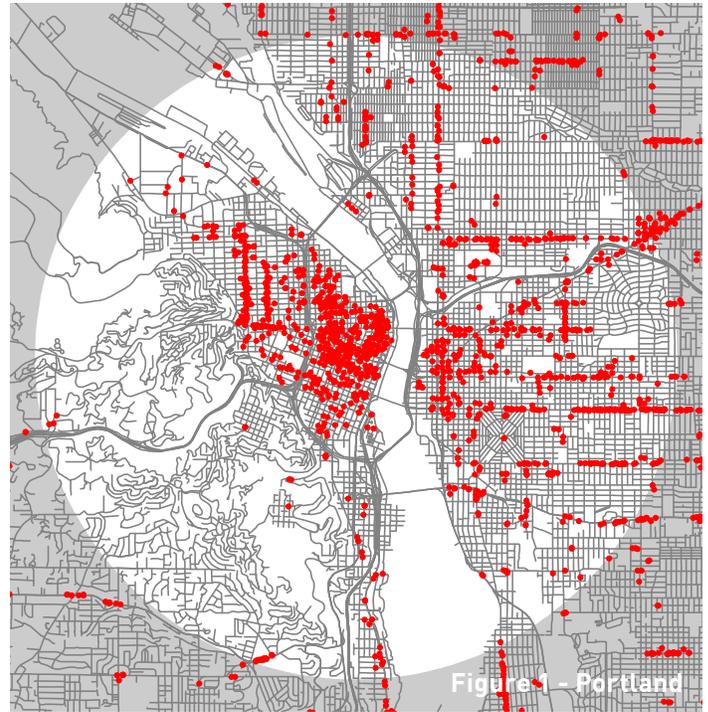
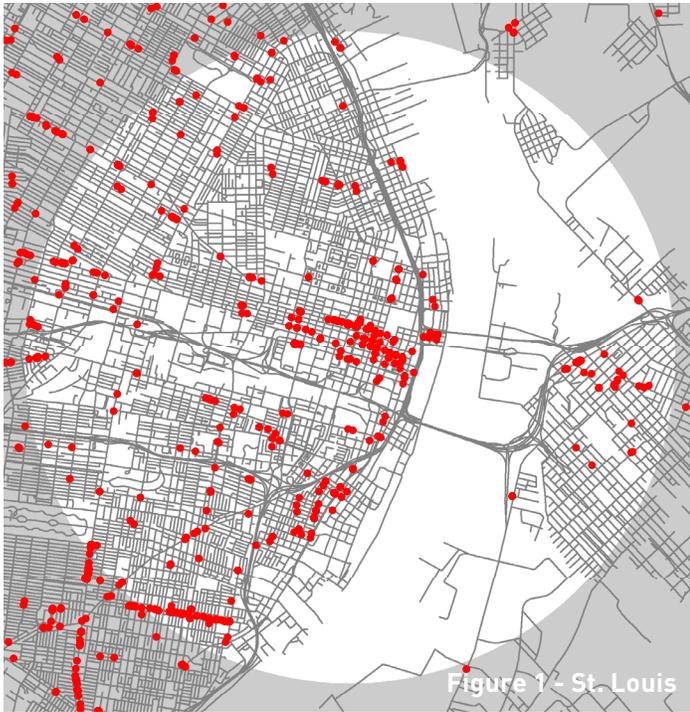
Rank	Metro	Storefronts*
1	New York	9,905
2	San Francisco	5,777
3	Los Angeles	3,173
4	Philadelphia	3,084
5	Boston	2,715
6	Chicago	2,068
7	New Orleans	2,015
8	Baltimore	1,949
9	Seattle	1,694
10	Portland	1,686
11	Washington	1,569
12	Houston	1,330
13	Miami	1,330
14	Denver	1,301
15	San Diego	1,266
16	Providence	1,246
17	San Jose	1,131
18	Dallas	1,112
19	Milwaukee	1,050
20	Cincinnati	1,002
21	Sacramento	960
22	Minneapolis	949
23	Atlanta	942
24	Austin	913
25	Pittsburgh	913
26	Columbus	842
27	Orlando	814
28	Rochester	811
29	San Antonio	807
30	Nashville	759
31	Louisville	757
32	Hartford	755
33	Salt Lake City	718
34	Las Vegas	665
35	Cleveland	613
36	Richmond	612
37	Tampa Bay	610
38	Buffalo	575
39	Charlotte	560
40	Indianapolis	533
41	Phoenix	532
42	Jacksonville	496
43	Kansas City	482
44	Birmingham	469
45	Raleigh	467
46	Memphis	459
47	Riverside	457
48	Virginia Beach	456
49	Oklahoma City	441
50	St. Louis	426
51	Detroit	411

*Storefront businesses within 3 miles of the center of the central business district and not more than 100 meters from another storefront business

Among metropolitan areas with a population of one million or more, the median metropolitan area has about 850 storefront businesses clustered within three miles of the center of its central business district. The least densely stored city centers are Detroit, St. Louis and Oklahoma City, each with fewer than 450 storefront businesses clustered within 3 miles of their city center. Seven other metropolitan areas have fewer than 500 storefront businesses clusters in this central area.

The typical metropolitan area has about 900 storefront businesses within 3 miles of the center of its central business district

Mapping Metropolitan Patterns of Development



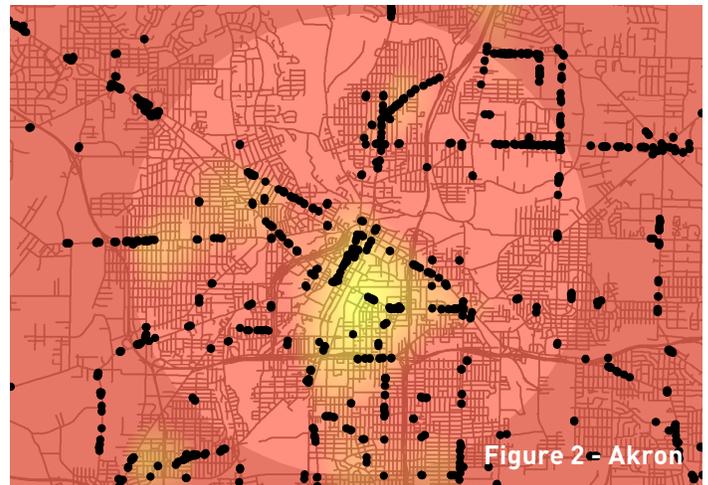
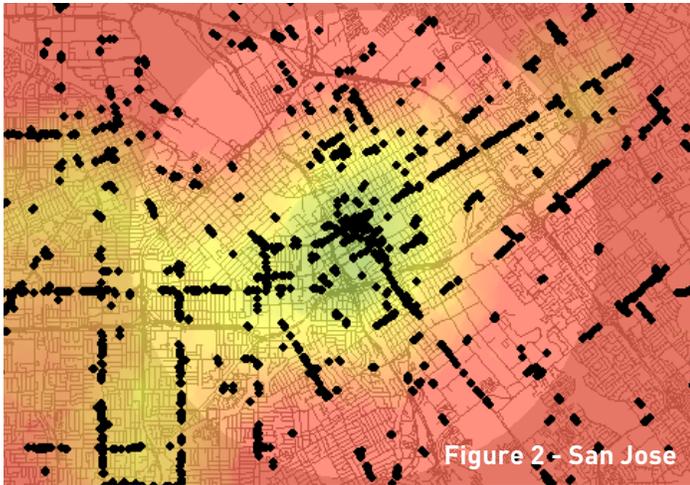
We can use our Storefront Index to map the number and concentration of storefronts in different cities. By mapping different city centers at the same scale, we can illustrate visually inter-metropolitan differences in the density and clustering of consumer-facing retail and service activity.

Storefront Businesses

Figure 1 shows the central business districts of two different cities: St. Louis and Portland. Each of the maps is drawn at the same scale, and the circles on each map are three miles in diameter and are centered on the center of the region's central business district.

As noted in Table 2, Portland has about 1,700 storefront businesses within three miles of the center of its CBD, while St. Louis has about 400. These maps illustrate both the difference in the concentration of businesses in the central business district, and also the presence and health of neighborhood business districts relatively close to the CBD. While both cities have a concentration of storefronts in their downtowns (the center of the circle), Portland's cluster of businesses is larger and denser. In addition, as one looks at the close-in urban neighborhoods (the area inside the 3 mile radius shown on these maps) there are more and larger clusters of storefronts throughout Portland than in St. Louis.

Walkability and Storefront Clusters



In recent years, there's been growing interest in walkability and in quantifying the walkability of different urban spaces. Walk Score is an algorithm that estimates the relative walkability of residential locations based on their proximity to a variety of common destinations, including schools, parks, stores and a range of service establishments. The Walk Score ranges from 0 to 100, with zero being “card dependent” and anything over 90 being “a Walker’s Paradise.” Walk Score is a household-facing measure of walkability; it looks at walkability from the perspective of a single residence or the origin of walking trips. Our measure, the Storefront Index, addresses walkability from the opposite perspective, considering the density of destination businesses.

To examine the relationship between storefront density and Walk Score, we have overlaid a heat map of Walk Scores on a map of storefront locations for the San Jose and Akron metropolitan areas in Figure 2. The

heat map is color-coded so that green areas represent the highest levels of walkability and red areas represent the lowest levels of walkability.

Not surprisingly, there's a strong overlap between clusters of storefront businesses and walkable neighborhoods. In both of these metropolitan areas the neighborhoods with the highest concentrations of storefront businesses (densest clusters of dots) have the highest Walk Scores (green areas). It's apparent that the greater concentration of storefront businesses in the center of San Jose is associated with a larger high-walkability area than is the case in Akron, where there is a much lower density of storefront businesses in the core and a correspondingly smaller area of high walkability. What's also apparent on these maps is that the walkability of linear storefront concentrations (arrayed along major arterials) is not as great as similar concentrations of storefronts in town centers.

Tracking Changes with the Storefront Index

As we've presented it here, the Storefront Index is a snapshot taken at a single point in time that we can use to compare different neighborhoods and different cities to understand the commercial density and geography.

Another use of the Storefront Index is to track the progress over time of the density of storefronts in particular neighborhoods. At City Observatory, our plan is to compile the Storefront Index periodically, so that we can monitor growth (and decline) in the numbers of storefronts.

To demonstrate the utility of the Storefront Index, we've created two maps of the Alberta district in Portland, Oregon in Figure 3. The Alberta district is a neighborhood commercial street in Northeast Portland, which has undergone substantial redevelopment over the past fifteen years. The first map shows the presence of storefront businesses in 1997, and the second map shows storefront businesses in 2014.

These maps clearly portray the growth of storefront activity along Alberta Street over the past decade and a half. The total number of storefront businesses has increased from fewer than 40 in 1997 to more than 100 in 2014. Alberta Street, which was once much less populated with these kinds of customer-facing businesses in 1997, now closely matches the levels and concentrations of such businesses found in other, longer-established neighborhood business districts in Portland.

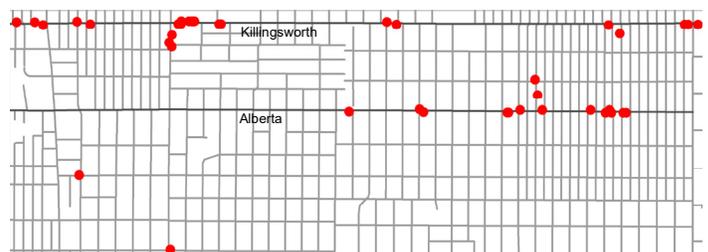


Figure 3 - Alberta District, 1997

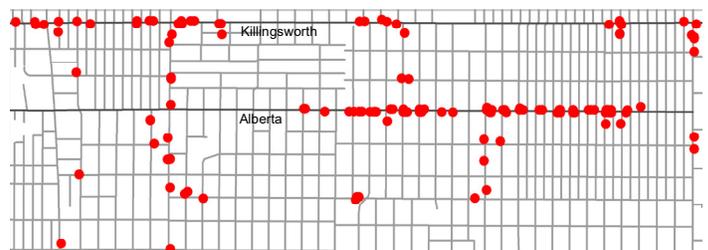
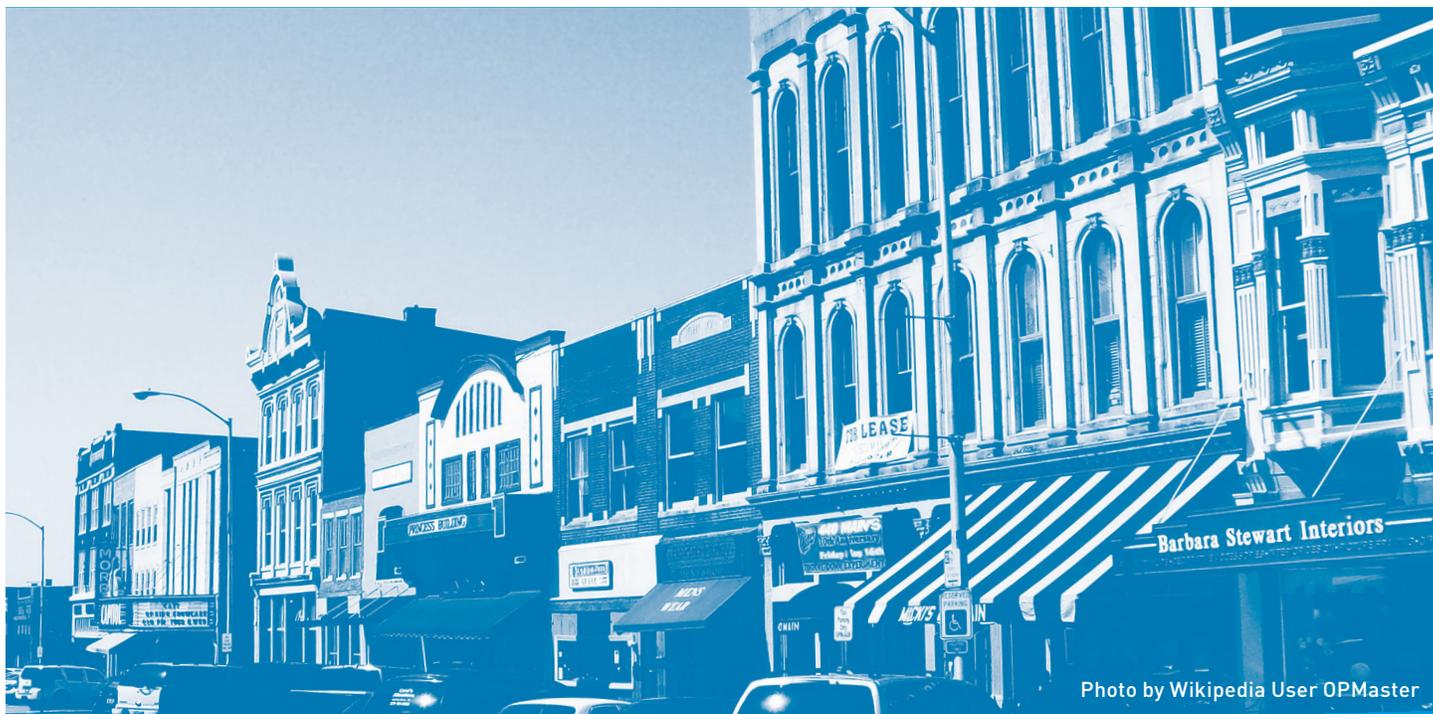


Figure 3 - Alberta District, 2014

A New Tool for Cities



The Storefront Index is a metric for quickly and graphically comparing the density and patterns of retail area in different parts of a metropolitan area and across metropolitan areas. Our Storefront Index maps are available at:

www.cityobservatory.org/maps/storefronts/

Like all of the content produced by City Observatory, these map files are freely available under a Creative Commons Attribution (CC) license.

Conclusion

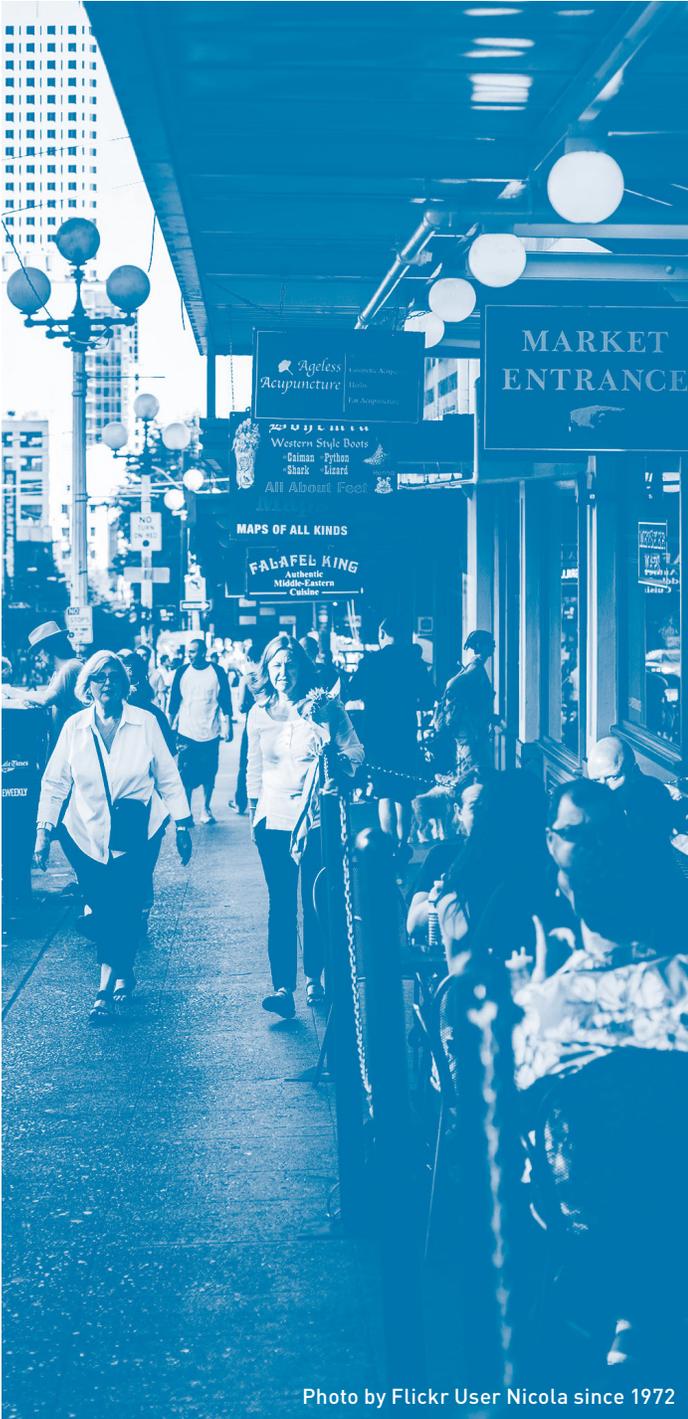


Photo by Flickr User Nicola since 1972

The advantages that cities provide to consumers in offering a range of different consumption alternatives provide convenience and measureable economic value for consumers, especially time-stressed households. Dense, diverse, interesting shopping districts are a hallmark of vibrant cities.

The Storefront Index identifies the location and concentration of these consumer-facing businesses, in particular neighborhoods, and provides a way of comparing the relative concentration of consumer-oriented businesses across metropolitan areas, and among neighborhoods within metropolitan areas. By tracking changes in the Storefront Index over time, it's possible to statistically and graphically summarize patterns of development. Preliminary evidence suggests that clusters of storefront businesses contribute measurably to the walkability of urban neighborhoods.

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Technical Appendix

Our Storefront Index is available online at:

www.CityObservatory.org/storefront/

Here you will find comparative maps of the Storefront Index for each of the 50 largest U.S. metropolitan areas. In addition, we have provided a GIS Shapefile with the Storefront Index data for use by other researchers.

Here's how we created our maps of storefront businesses. Storefront business data were extracted from the Custom Lists U.S. Business Database. Data were current for 2014. Using the standard industrial classification code attached to each business establishment in the database, we selected all the establishments that were coded as being in one of the 44 codes identified in Table 1. We compared the volume of listings of indicator businesses in the Customs Lists database with other similar sources of data and with the US Census Bureau's County Business Patterns tabulations. For two metropolitan areas--Detroit and Hartford--we determined that the Customs Lists database significantly undercounted the presence indicator businesses. For these metropolitan areas, we utilized data from an alternate provider, USAInfo. We then used geographic information system (GIS) software to exclude from the database any business that did not have at least one other storefront establishment within 100 meters of its location. This step assured that we identified retail areas with multiple businesses and excluded isolated

establishments that may have been mis-classified or mis-located in the database.

For our radius analysis, we identified the center of the central business district of the principal city in each metropolitan area (usually a street intersection or landmark such as city hall) and used GIS software to draw a three-mile circle around that point. We then used the software to count the number of establishments inside that circle. Each circle includes the same total area in each city (about ten square miles); in most cases that radius includes non-buildable areas (bodies of water such as rivers, lakes and oceans).

We constructed Walk Score heat maps with data provided by Redfin (www.WalkScore.com). We used the Walk Score API to look up the Walk Score for a grid of coordinates for each metropolitan area and then used a smoothing algorithm to create the heat map of Walk Scores.

Table A-1: Storefront Businesses, Top 51 Metro Areas, by SIC Category

Industry	Establishments
Eating and Drinking Places	138,092
Beauty Shops	61,098
Grocery Stores	38,728
Miscellaneous Retail Stores, NEC	36,353
Gift, Novelty, and Souvenir Shops	17,188
Used Merchandise Stores	16,505
Furniture Stores	16,378
Amusement and Recreation Services, NEC	14,668
Drinking Places (Alcoholic Beverages)	12,871
Women's Clothing Stores	11,819
Drug Stores and Proprietary Stores	11,080
Barber Shops	10,534
Retail Bakeries	10,346
Jewelry Stores	9,192
Sporting Goods Stores and Bicycle Shops	9,086
Radio, Television, and Consumer Electronics Stores	8,757
Florists	8,423
Miscellaneous Food Stores	7,820
Department Stores	7,525
Shoe Stores	6,760
Physical Fitness Facilities	6,293
Family Clothing Stores	5,773
Hobby, Toy, and Game Shops	5,723
Video Tape Rental	5,345
Bands, Orchestras, Actors, and Other Entertainers and Entertainment Groups	5,206
Variety Stores	4,723
Book Stores	4,552
Retail Nurseries, Lawn and Garden Supply Stores	4,423
Hardware Stores	4,068
Optical Goods Stores	3,941
Men's and Boys' Clothing and Accessory Stores	3,911
Record and Prerecorded Tape Stores	3,725
Meat and Fish (Seafood) Markets, Including Freezer Provisioners	3,326
Stationery Stores	3,278
Musical Instrument Stores	2,826
Miscellaneous General Merchandise Stores	2,653
Membership Sports and Recreation Clubs	2,625
Museums and Art Galleries	2,140
Shoe Repair Shops and Shoeshine Parlors	1,901
Fruit and Vegetable Markets	1,870
Candy, Nut, and Confectionery Stores	1,759
Drapery, Curtain, and Upholstery Stores	1,648
Motion Picture Theaters, Except Drive-Ins.	1,356
Bowling Centers	564

City Observatory is a virtual think tank, contributing original data-driven research and regular commentary on what matters to city success, focused on how building great places to live can attract, develop and harness talent to create widely shared opportunity. This research was supported in part by funding from Knight Foundation.