Brooklyn Park Full-Service Restaurant Study

City of Brooklyn Park

March 2012

Stantec

March 2, 2012

Amy Baldwin
Business Developer
City of Brooklyn Park
5200 85th Avenue North
Brooklyn Park, MN 55443

Re: Brooklyn Park Full-Service Restaurant Study

Dear Ms. Baldwin:

Stantec is pleased to present our market study that assessed the potential demand for additional full-service restaurants in Brooklyn Park, MN. This study analyzes the competitive restaurant situation, defines restaurant trade areas in Brooklyn Park, and quantifies demand for full-service restaurants in each trade area. We have enjoyed performing this study for you and are available if you need additional information.

Sincerely,

STANTEC CONSULTING SERVICES INC.

Jay Demma
Project Manager

Paul Bilotta
Redevelopment Specialist

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Executive Summary

INTRODUCTION

The following is a summary of the study purpose, major findings, conclusions, and recommendations contained in this report.

STUDY PURPOSE

The City of Brooklyn Park engaged Stantec to conduct a study of the market potential to support more full-service restaurants in the community. The interest in conducting a market study was based on results from a recent community survey where 45% of residents polled stated there were not enough full-service restaurants in the City. Interest among City residents for more full-service restaurants is understandable since a rich retail environment with a diverse selection of restaurants is an important contributor to quality of life.

METHODOLOGY

The methodology applied to achieve the study objective includes:

- An overview of restaurant classifications, general trade area characteristics, and consumer trends
- A review of the current supply of restaurants in and surrounding Brooklyn Park
- A determination of restaurant trade areas in Brooklyn Park and their demographic composition
- Calculation of the amount of the over- or under-supply of sit down restaurants in each trade area
- Discussion of real estate issues affecting restaurant development in Brooklyn Park with recommended development strategies

DATA ANALYSIS

This study represents a compilation of data gathered from various sources, including local records, interviews with local officials and real estate professionals, as well as secondary demographic material. Although Stantec judges these sources to be reliable, it is impossible to authenticate all data. The analyst does not guarantee the data and assumes no liability for any errors in fact, analysis, or judgment. The secondary data used in this study are the most recent available at the time of the report preparation.

The objective of this report is to gather, analyze, and present as many market components as reasonably possible within the time constraints agreed upon. The conclusions contained in this report are based on the best judgments of the analysts; Stantec makes no guarantees or assurances that the projections or conclusions will be realized as stated. It is Stantec's function to provide our best effort in data aggregation, and to express opinions based on our evaluation.

RESTAURANT CLASSIFICATIONS

Restaurants can be classified in any number of ways, but their primary differences are based on level of service, type of ownership, and type of food served.

Level of service directly affects a restaurant's layout and staffing levels. The three primary levels of service are Take Out, Fast Food, and Sit-Down or Full-Service restaurants. Full-service restaurants, which are the primary concern of this study, tend to be the most expensive dining option because of the need for dedicated wait staff to assist customers and the longer times associated with the meal.

The three main types of ownership are national chain, regional chain, and independent operator. National chains have the most stringent requirements for site selection but also have the resources to afford the highest priced locations and conduct expensive advertising campaigns. As a result, national chains often have the largest spaces and pull customers from the widest trade areas.

Restaurants also segment based on type of food served or cuisine. Although any type of food can be prepared at any service level and have any type of ownership, it is usually the primary determinant of which restaurants are most competitive with one another.

A brief noted about nomenclature. This report regularly refers to sit-down restaurants and full-service restaurants. These terms are used here interchangeably and mean the same thing.

TRADE AREAS

Restaurant trade areas do not necessarily follow any straightforward rules. Nonetheless, for analytical purposes it is important to apply some basic principles to help our understanding. The Urban Land Institute has defined trade areas for different classes of shopping centers. In suburban communities similar to Brooklyn Park, restaurants tend to follow these same trade area characteristics. For example, restaurants located in very small shopping centers tend to draw customers from only the immediate neighborhood, whereas restaurants located in large regional shopping malls draw from very large trade areas that span entire quadrants of a metro area.

TRENDS

National watchers of restaurant trends have indicated that the restaurant industry is moving to more flexible formats. For example, more and more restaurants are operating during the day as fast food or fast casual restaurants but then switch to a full service format by night. This allows the restaurant to capture more market share by appealing to broader market and maintain productive use of facilities throughout the day. The result of such trends can be seen in recent statewide sales figures for restaurants. Between 2003 and 2009, the overall share of restaurant sales in Minnesota for full service restaurants plummeted from 85 percent to 63 percent.

EXISTING RESTAURANT ENVIRONMENT

In Brooklyn Park there are a total of 77 restaurants, 30 of which are full service, 33 are fast food, and 14 are take out. Of the full service restaurants, though, only four are national chains. There are four areas in which there is a strong concentration of restaurants: the area around West Broadway and Brooklyn Boulevard, Brooklyn Boulevard between Zane Avenue and Regent Avenue, around Highway 252 and 85th Avenue, and Highway 610 and Zane Avenue.

There is a conspicuous absence of full service restaurants in Brooklyn Park. However, Brooklyn Park borders several areas with major retail hubs that have attracted a large number of national sit-down restaurants. In many ways, these areas have filled in the void of full service chain restaurants in the City. In particular is the Arbor Lakes area in Maple Grove, which has 18 national chain sit-down restaurants.

TRADE AREA DEFINITIONS AND ANALYSIS

In order to calculate potential demand for additional sit-down restaurants in Brooklyn Park, four trade areas were identified and defined within the City. These trade areas were defined based on the location of existing significant retail nodes in the City, competitive restaurant areas, and drive times around the nodes. The four trade areas were centered on the following retail nodes: West Broadway and Brooklyn Boulevard, Highway 252 and 85th Avenue, Highway 610 and Zane Avenue, and 63rd Avenue and Boone Avenue. The following are key findings of the demographic situation in each trade area:

The West Broadway and Brooklyn Boulevard trade area has the largest number of households and workers but also has the highest proportion of low-income households. The Highway 252 and 85th Avenue trade area has low number ratio of workers to households. The Highway 610 and Zane Avenue trade area has by far the highest household incomes, and the 63rd Avenue and Boone trade area has least number of households.

CALCULATED SIT-DOWN RESTAURANT DEMAND

The methodology for calculating sit-down restaurant demand took into consideration such factors as number of households, income, number of restaurants, and number of workers and their wages. The following table summarizes the demand for each trade area.

Table 1: Sit-Down Restaurant Supply and Demand 2010 and 2020

Brooklyn Park Restaurant Trade Areas	2010			2020		
	Supply (sales capacity)	Demand (purch. power)	**Over / Under Supply**	Supply (sales capacity)	Demand (purch. power)	**Over / Under Supply**
W Broadway & Brooklyn Blvd	$20,053,000	$11,005,650	**-$9,047,350**	$20,053,000	$11,228,236	**-$8,824,764**
Highway 252 & 85th Ave	$10,092,500	$10,087,796	**-$4,704**	$10,092,500	$9,990,460	**-$102,040**
Highway 610 & Zane Ave	$11,594,000	$12,178,147	**$584,147**	$11,594,000	$23,854,478	**$12,260,478**
63rd Ave & Boone Ave	$3,547,500	$4,009,178	**$461,678**	$3,547,500	$4,380,951	**$833,451**

Source: Stantec

Calculated 2010 demand for sit-down restaurants in Brooklyn Park appears to be met in each of the four defined trade areas with only modest excess amounts of demand in two trade areas.

By 2020, though, the area around Highway 610 and Zane Avenue will experience significant household and employment growth that would allow it to support 8 to 12 new sit-down restaurants, possibly including several national chain restaurants.

COMMUNITY ASSESSMENT AND DEVELOPMENT ISSUES

In addition to quantifying current and projected restaurant demand, real estate issues influencing development potential in the City were analyzed to provide additional context to the likelihood of supporting new development. Several commercial Realtors were interviewed to solicit their feedback and most agreed that Brooklyn Park is indeed underserved for restaurants but that the effect of restaurants located in surrounding communities significantly limits development potential. Moreover, they noted that the changing restaurant industry in which full service restaurants are quickly becoming a smaller share of the market has meant that most national chains are targeting high profile locations with lots of amenities and superior highway accessibility and visibility.

Taking into consideration these development issues, the following are recommended development strategies that would help mitigate the obstacles to attracting national sit-down restaurants:

1. The area that seems to be the most suitable for future sit-down restaurants is along the Hwy 610/Hwy 169 corridors. These areas have the potential to provide the traffic, visibility, and daytime employment necessary to support sit-down restaurants. Any efforts to attract a sit-down restaurant should be concentrated in this area. Developers should be encouraged at early stages in the development process to consider the possibility of including a sit-down restaurant in their development concept.

2. Sit-down restaurants are more concerned with creating a quality dining experience for its customers than other types of restaurants. Sit down restaurants are often developed with higher quality materials and amenities, including natural stone, upgraded lighting, natural woods, accent metals, stained glass and even fireplaces. This higher level of finish adds value to the operation by encouraging customers to be more willing to spend more time at the restaurant and generate a larger bill.

   This desire for higher amenity and creating a quality dining experience does not end at the front door of the restaurant. Retail areas can be made more conducive to sit-down restaurants by increasing the level of amenity, particularly landscaping and water treatment.

   The City should review the design standards for retail development to determine if adequate levels of amenity are being required to create the sorts of retail spaces that would support sit-down restaurants.

3. Sit-down restaurants in suburban markets do not typically like to be in strip retail and prefer standalone sites. Retail developers should be encouraged to leave a highly visible lot within the retail development that could support a sit-down restaurant.

4. Fast food restaurants can often outbid sit-down restaurants for development sites because of their high frequency turnover and use of drive through lanes to increase the number of customers served beyond what can be physically accommodated within the building. In addition, the presence of fast food can reduce the dining character that would attract sit-down restaurants. Some cities have attempted to mitigate this situation by limiting the areas where drive through lanes are permitted for restaurants. This can be effective, but can also generate opposition both from the public and developers so any recommendation of this type needs to be based on a solid planning grounds with significant opportunities for stakeholder input.

5. The Hwy 610/Hwy 169 interchange area could benefit from more detailed design work than what typically occurs at the comprehensive planning level. The main focus of this conceptual design work would be to establish a clear identity within the development community for that key location so that the City's vision is understood clearly and developers and restaurant owners can plan accordingly. In addition, a preliminary master plan could identify opportunities to create a high amenity space within the future office uses that would be attractive to sit-down restaurants. An older example of this is the Centennial Lakes project in Edina where stormwater management was integrated into

other design features to create a destination environment. More recently, the West End development in St. Louis Park was created which is tied closely into future office towers.

A key will be to provide a series of conceptual elevations so that developers, restaurant owners, and the public at large can easily visualize the City's vision and intent. This does not mean to imply that detailed and inflexible design principles need to be employed, but rather images of key elements that demonstrate the desired types of destination amenities.

Restaurant Classifications

INTRODUCTION

Restaurants can be classified in any number of ways, but their primary differences are based on level of service, type of ownership, and type of food served. This section presents background information on the various service levels and classifications used to describe the restaurant market.

LEVEL OF SERVICE

Level of service is an important differentiator in the restaurant industry because it can directly affect the number and type of employees needed as well as the amount of space required for the business. The following is a basic description of the three main types of service levels that most restaurants fall under.

TAKE OUT/DELIVERY

Take Out and Delivery-only restaurants do not provide any seating for customers. Therefore, service is limited to counter purchases or orders taken by phone/internet with delivery of food to a specific location within an allotted amount of time. Due to the lack of customer seating needed, most of the restaurant space is used for food preparation, though a waiting area and parking area may be needed for over-the-counter purchases. Other restaurant formats often provide take out and delivery service in addition to their standard level of service. Therefore, restaurants that rely solely on this type of service often take advantage of their lower overhead and sell common easily produced fare at very competitive rates. In recent years, for example, many pizza-based restaurants have switched to this level of service exclusively.

FAST FOOD OR QUICK SERVICE RESTAURANT (QSR)

Fast food restaurants provide seating for customers, though the purchasing of food is done at a counter prior to seating. Fast food restaurants can be further broken down into two types.

The most prevalent type of fast food service is when food is provided to the customer at the point of purchase. In these restaurants, customers then seat themselves with their food and then typically discard their waste themselves at prominently located waste bins. In many cases, these types of restaurants often have a drive-through window to capture customers who do not want to eat at the seating provided. Many highly recognized restaurant chains, such as McDonald’s and Burger King, fall under this level of service.

The other type of fast food restaurant has been characterized as “fast casual” in which the customer places their food order at a counter and then is given a small placard with a number or image and then selects a seat in the dining room. When the food is ready, a restaurant employee then locates the customer by noting the number or image on the placard and delivers the food accordingly. In this type of service, it is common that the customer does not clear their own waste and that a restaurant employee will provide this service. A derivation of this service is when a name is provided at the point of purchase and the customer, after having selected a table in the dining area, is then called to another counter to receive their food order.

Fast food restaurants have grown rapidly in the last several decades in response to changing family structures in which increasing numbers of two-earner households and single-parent households greatly value the convenience and affordable prices often associated with these formats.

SIT-DOWN OR FULL SERVICE RESTAURANT

The sit down or full service restaurant typically fits the traditional definition of restaurant. Customers are seated at a table and a wait person assigned to the table takes orders, delivers food, buses dishes, and receives payment for the food and service. The wait person often has an influence on the customer experience that can, at times, be equal to or greater than the food. Although there is a large variation in style and price among sit down restaurants, they generally have higher prices than other service level restaurants due to the additional service provided by the wait staff and, often times, higher quality of food.

It should be noted that the variety of sit down restaurants is much larger than the other service formats. Sit down restaurants can include everything from diners with modest décor, informal service, and affordable prices to fine dining restaurants with very expensive food offerings, formal service, high levels of interior design, and celebrity driven chefs.

OTHER TYPES OF SERVICE

Although take out, fast food, and sit-down restaurants comprise the vast majority of restaurants other service levels are found in the restaurant continuum which can have a prominent position in the marketplace. One type is cafeteria restaurants. Cafeteria restaurants will compete most directly with fast food restaurants with respect to pricing and convenience. Customers file through a line of various food offerings placing their selection on a tray. At the end of the line the items are totaled and paid for. Then the customer selects a table in the dining room.

A similar style to the cafeteria is the buffet, where customers typically pay a pre-arranged fixed fee and then upon being seated at a table, are invited to select any number of food options from regularly stocked kiosks.

An emerging restaurant style in the Twin Cities metro area is known as the food truck. Although this concept has been around for decades in other metro areas or in limited use near large factories or construction sites, the latest generation of food trucks have achieved affordability with distinctive, nearly gourmet level fare. Functionally very similar to take out restaurants, food trucks can go where customers are located and are not encumbered by location. Therefore, through deft on-line marketing, the food truck is carving out an interesting niche in the restaurant market.

TYPE OF OWNERSHIP

Type of ownership is another important way to classify restaurants. Ownership type can have an impact on the business model of the restaurant, capture rate, and size of the trade area. The following is a brief description of the three main types of ownership.

NATIONAL CHAIN

National chain restaurants follow a tightly defined model of operations that often have strict standards for size of the restaurant, number of customers in a trade area, food offerings, prices, and location. These strict standards are created as a result of economies of scale, which allow the parent company to leverage nationally-based advertising campaigns, easily replicable management models, and streamlined construction methods. As a result, national chain restaurants whether located in Brooklyn Park, MN or Atlanta, GA or Los Angeles, CA will almost always be identical.

National chain restaurants are prevalent in each level of service category, but are especially dominant in the fast food category because of their ability to control costs while providing quality, though limited, service. Moreover, national chains can afford the types of heavily promoted advertising campaigns that can most effectively reach the primary target market for fast food restaurants -- busy family households.

REGIONAL OR LOCAL CHAIN

Regional or local chain restaurants share many characteristics with national chains in that they are leveraging economies of scale. However, regional chains vary slightly in that they typically have a food concept that may or may not work at the national level. Moreover, corporate leadership may still have an active role in the management of individual restaurants. Therefore, regional chains can sometimes respond to market changes much more quickly than national chains. Furthermore, there is potential for each restaurant location to have a more unique identity than national chains. In many cases, due to the regionalized fare on the menu and strong association with a local market, regional chains can have a very strong customer following not found among many national chains.

INDEPENDENT

Independent restaurants often fit the profile of mom-and-pop establishments with owners who are also operators. These restaurants fill the huge void left by national and regional chains and are not designed to capitalize on mass market tastes and preferences. Many independent restaurants are a labor of love for their owners and thus often reflect their personalities by coming in all shapes and sizes.

Most independent restaurants are sit-down full service restaurants. This is because fast food formats usually require the capital intensive resources of a chain to be successful. Whereas, sit-down restaurants by allowing so much more variation can appeal to smaller market segments at locations that do not require the highest rents. The term that often describes independent restaurants is “hole-in-the-wall”; a term that implies small, quaint, and somewhat off the beaten track. Although not all independent restaurants are small, quaint, and off the beaten track, there is an association that these restaurateurs are risk takers who are willing to try new things and that they add a tremendous amount of variety and interest to the marketplace.

TYPE OF FOOD

The third component to a restaurant’s format is type of food served. The type of food served is probably the most important determinant of which restaurants are most directly competitive with one another. For example, many fast food restaurants certainly compete with one another because of their ability to provide affordable food in a quick manner at a convenient location. Therefore, to some degree McDonald’s competes with Taco Bell even though the foods they offer are different. However, McDonald’s more closely competes with other fast food restaurants that also focus on burgers, such as Burger King and Wendy’s.

Nonetheless, independent restaurateurs are constantly changing what qualifies as an established food format. Fusion concepts, for example, have popped up in recent years in which numerous menu items defy categorization because they fuse two or more established formats. Furthermore, immigrant populations often introduce new food types to a local market by featuring cuisine of their native countries.

Trade Area Overview

Based on the previous section describing the many differences among restaurants, it can be concluded that there is no simple formula from which to define restaurant trade areas. Therefore, in order to provide some guidance in understanding the geographic reach of restaurants, we take into account the criteria for defining retail shopping centers (of which restaurants are a common element) as determined by the Urban land Institute (ULI).

ULI takes into account a shopping center's tenants and general characteristics to define the size of its trade area. Typical draw areas and minimum supportive populations vary considerably across the country, and mainly depend on the density of housing and the attraction of the specific retail tenants. Therefore, restaurants in higher-density areas can thrive with smaller trade areas; whereas restaurants in lower-density areas will require much larger trade areas. The following are general classifications that ULI has defined for retail centers and can be adapted to restaurants:

- **Convenience Center** – A convenience center offers personal services and convenience goods. These centers are generally anchored by a superette or small grocery. Therefore, a restaurant located in a convenience center generally draws customers from within a ½-mile to 1½-mile trade area (less than 5 minutes driving time). Take out restaurants, both independent and chains, often locate in convenience centers, though some independent sit-down restaurants can be attracted to these types of centers because of their lower lease rates. The small center located at Brookdale Drive and Humboldt Avenue would be a good example of a convenience center.

- **Neighborhood Center** – Generally built around a supermarket as the principal tenant, neighborhood centers also provide convenience goods and personal services to the immediate neighborhood. Neighborhood centers have a greater number of retailers than convenience centers, and are often anchored by a supermarket rather than a superette or small grocery. Therefore, restaurants located in a neighborhood center typically draw customers from at least a 1½-mile trade area, and usually up to a 3-miles radius (5 to 10 minutes driving time). Fast food, take out, and independent sit-down restaurants often locate in neighborhood centers. The Edinburgh Festival Center located at Highway 252 and 85th Avenue North is a good example of a neighborhood center.

- **Community Center** – A community center offers the convenience goods and personal services of neighborhood centers, in addition to soft line (e.g. apparel) and/or hard line products (e.g. appliances, hardware). Many are built around a junior department store, super drug store, or discount department store, in addition to a supermarket. Therefore, restaurants located in a community center typically draw customers from a trade area of 3 to 5 miles (10 to 20 minutes driving time). Fast food and both independent and chain sit down restaurants are often attracted to community centers. The concentration of stores and centers around West Broadway Avenue and Brooklyn Boulevard is a good example of a community center.

- **Regional Center and Super Regional Center** – These two classes both offer extensive variety in general merchandise, apparel, furniture, and home furnishings, as well as a range of services and recreational facilities. Unlike the preceding classes, however, neither of these traditionally includes a grocery component. They generally draw customers from 8 to 12 miles away (20 to 30 minutes in driving time). Many such centers have interior food courts dominated by national fast food restaurants that primarily serve shoppers. In addition, regional centers also feature many national sit-down restaurants that often locate on their periphery. National chains are attracted to regional centers because they often have the resources to afford higher rents. Brooklyn Park does not have any regional centers, though the Arbor Lakes area in nearby Maple Grove would be a good example of a regional center or super regional center.

The following Table 2 is a summary of the general trade area characteristics for restaurants and the retail centers they often complement.

Table 2: General Trade Area Characteristics of Restaurants

	Restaurant Type									Trade Area	Trade Area
	National			Regional			Independent			Radius	Drive Time
Center Type	TO	FF	SD	TO	FF	SD	TO	FF	SD	(miles)	(minutes)
Convenience	**X**			**X**			**X**	x	x	<1.5	<5
Neighborhood	**X**	x		**X**	**X**	x	**X**	**X**	**X**	1.5 - 3	5 - 10
Community	x	**X**	x		**X**	**X**			**X**	3 - 5	10 - 20
Regional		**X**	**X**			**X**			x	5 - 12	20 - 30

Key:
TO = Take Out; FF = Fast Food; SD = Sit-Down
X = Common; x = Not as Common

Although it is important to generalize restaurant trade areas for analytical purposes, it is also important to keep in mind that many restaurants do not have trade areas that correspond to typical retail patterns. For example, upscale, special-occasion restaurants often serve very large trade areas because of a particular market niche or reputation. Conversely, some restaurants rely on a captive market (think airports or large office buildings) and therefore are not dependent on traditional notions of a trade area. Because this study is primarily concerned with market conditions associated with national or chain sit down restaurants and Brooklyn Park's development pattern is mostly suburban in nature, we believe the trade area characteristics summarized in Table 2 work well.

Restaurant Trends

INTRODUCTION

Because a primary purpose of this study is to calculate current and future market support for full service restaurants in Brooklyn Park, it is important to review any restaurant trends that may provide critical context for the assumptions used in the calculations. Therefore, this section presents information on broad consumer trends influencing restaurants as well as recent industry sales data.

FORECASTED CONSUMER TRENDS

Blue MauMau, a website devoted to restaurant franchising, published an Internet article about the top seven trends affecting restaurants in 2012, which are[1]:

1. **Consumers Seek a Twist on the Familiar:** Shell-shocked consumers are in no mood to take risks, but novel flavors still tingle their taste buds. Look for comfort foods with a twist (gourmet, ethnic, artisan, wood-fired) as well as innovation in familiar formats (sandwiches, wraps, pizza, pasta) rather than breakout items taken from less-familiar global cuisines.
2. **Commodities Costs Drive Rustic Fare Made In-House:** Commodity costs are rising, labor costs hold steady and diners demand rustic fare, the simple preparations of fresh ingredients. Result: operators will curtail purchases of value-added items in favor of cheaper cuts, beans, grains and produce that require more back-of-house prep to transform into honest, homestyle food.
3. **The Next Steps in Local Sourcing:** The rising use of seasonal and local items suits the less-is-more culinary trend. To facilitate flexible purchasing, growers, manufacturers, distributors and operators continue to work toward a more transparent, safe and efficient supply chain, streamlining workflow, recording every step and reducing waste.
4. **Social Networking Influence Accelerates:** Consumers increasingly trust friends and peers more than professional marketers. They're taking control of social media to share their restaurant experiences and opinions with the public (via review sites such as OpenTable), with their own circles (via Facebook and Foursquare) or both (via Twitter). This helps some restaurants rocket to popularity and leaves others quiet.
5. **Customers Want More Information:** Consumers want transparency—looking for disclosure of everything from calories and allergens on menus to labor and local-sourcing practices. A small but growing number are serious about nutrition, labeling, sustainability and community involvement, and they are using such knowledge to make purchasing decisions.
6. **Operators Try to Resist Discounting:** The foodservice industry will continue to operate in a take-share environment, but discounting is cutting to the bone. To counter daily deals and other forms of discounting, operators turn to creative, sometimes in-the-moment, methods to reward their best customers, such as a free dessert out of the blue.
7. **Brands Expand Through Flexible Formats:** Format flexibility is required as restaurants cater to new around-theclock dayparts, switch gears from fast-casual by day to full-service at night, or transform their kitchens into catering commissaries during slow

[1] http://www.bluemaumau.org/10865/2012%E2%80%99s_seven_top_restaurant_trends

times. This flexibility is also evidenced in streamlined, high-efficiency smaller-footprint units and brand extensions.

SALES TRENDS

The Minnesota Department Revenue tracks sales figures among restaurants and breaks them down by full service and limited service types. Chart 1 displays annual gross sales in Minnesota from 2003 to 2009, the most recent year data is available. According to the graphic, sales at full service restaurants were generally flat between 2003 and 2008 and then experienced a sharp decline in 2009. Meanwhile, limited service restaurants experienced strong gains in sales each year since 2003 (2006 being the exception) with particularly strong increases in 2005 and 2009.

The graphic clearly indicates how the recent recession impacted the restaurant industry with significant losses in full service restaurant sales off-set by significant gains at limited service restaurants. This suggests that households did not necessarily cut back on the frequency of dining out during the recession but simply switched to more affordable options. The graph is also indicative of the impact of the “fast casual” component of quick service dining, which has eaten into the market share of full service options.

Chart 1: Minnesota Gross Sales for Eating Places 2003-2009

Source: Minnesota Department of Revenue, Tax Statiistics

Competitive Review

INTRODUCTION

This section assesses the current restaurant environment in Brooklyn Park and surrounding communities

BROOKLYN PARK RESTAURANTS

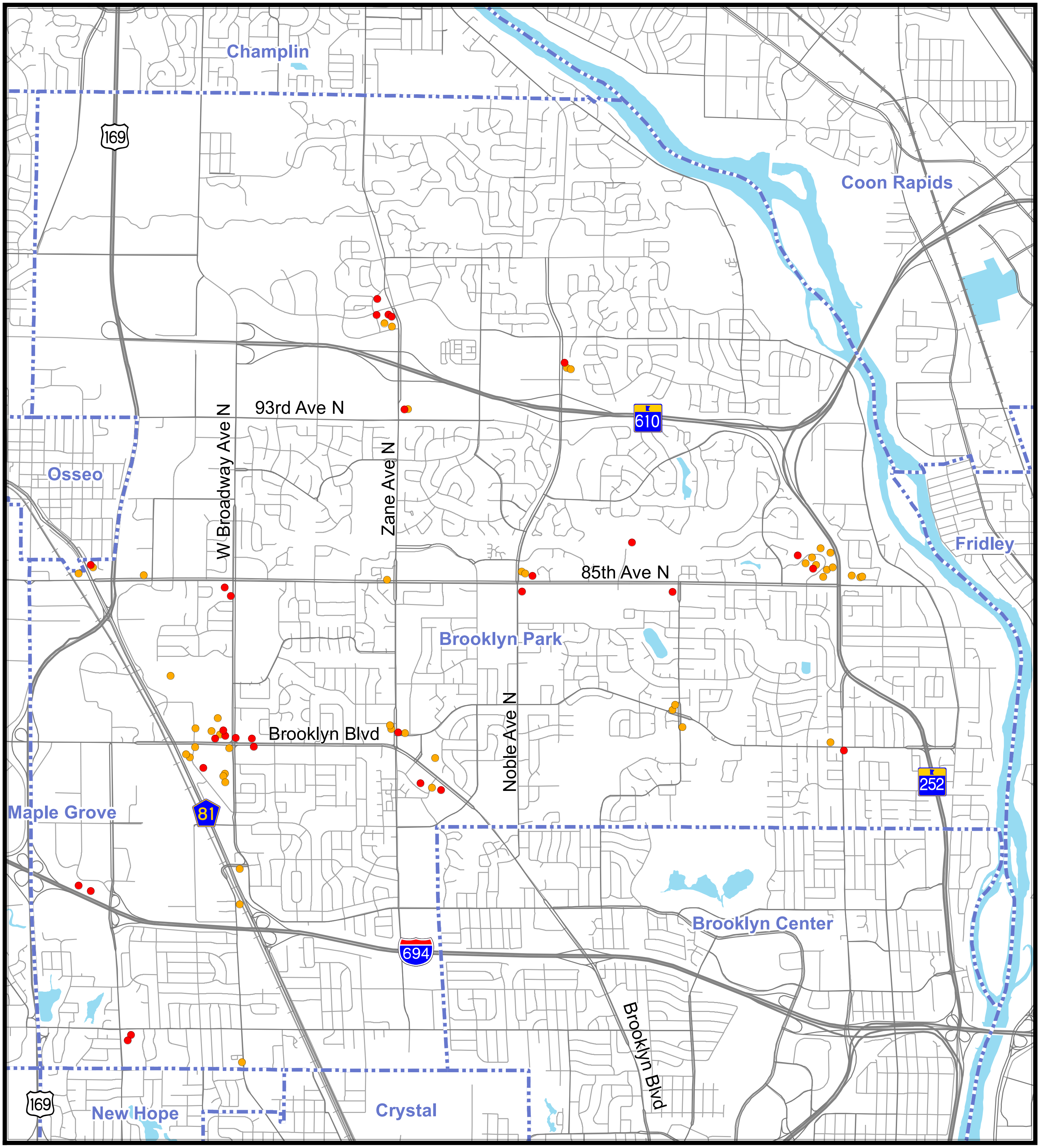
Stantec received from the City of Brooklyn Park a list of all active restaurants by type. The list included a total 77 restaurants with 30 classified as Full-Service or Sit Down, 33 classified as Fast Food/Fast Casual, and the remaining 14 as Take Out/No Seating. The map on the following page displays the location of each restaurant on the list noting whether it is a sit-down or other type of restaurant. The map clearly shows there are four districts in Brooklyn Park with significant concentrations of restaurants. These are:

1. **Brooklyn Boulevard and West Broadway Avenue**: This area contains the largest concentration of restaurants in Brooklyn Park. There are 18 restaurants, six of which are sit-down restaurants. Restaurant activity in this area is influenced by the traffic generated by several large-format retailers in the area, such as Target, Wal-Mart, and Cub Foods, as well as significant amounts of day time employment in nearby business parks immediately west of highway 81. National chain sit-down restaurants include Applebee's and Bakers Square. Other independent sit-down restaurants include two Asian restaurants, a Mexican restaurant, and a bar and grill.

2. **Highway 252 and 85th Avenue**: The second largest concentration of restaurants is found in the area around Highway 252 and 85th Avenue. There are 12 restaurants in this area with only two being sit-down restaurants, Lemon Grass, a Thai restaurant, and Fat Nat's Eggs, neither of which are national chains. The market for these restaurants is mostly neighborhood residents as there is very little employment nearby and the only large-format retailer is a Festival Foods grocery store.

3. **Brooklyn Boulevard between Zane Avenue and Regent Avenue**: The area along Brooklyn Boulevard between Zane Avenue and Regent Avenue contains eight restaurants, three of which are sit-down restaurants; Brunswick Zone, Blondie's Bar and Grill, and Mama Ti's African Kitchen. Only the Brunswick Zone is a national chain, and it also features a strong entertainment component in addition to dining. This district is only one mile east of the area around Broadway and Brooklyn Boulevard. Therefore, many of the restaurants in this area directly compete with those at Broadway and Brooklyn Boulevard.

4. **Highway 610 and Zane Avenue**: An emerging retail district in the City's town center area currently has nine restaurants, five of which are sit-down restaurants. This is in contrast to the other major retail nodes in the City which are dominated by non-sit-down restaurants. Although there are no national chain sit-down restaurants in this area, there is a local chain, Sammy's Pizza and Restaurant. This area is newly developing and is surrounded by many newer residential subdivisions indicating that continued housing development and employment growth will substantial increase demand for restaurant space in the future.



Restaurants in Brooklyn Park

- Sit-Down/Full Service Restaurants
- Other Restaurants
- City Limits
- Open Water

N W E S

0 0.8 1.6 Miles

February 21, 2012

Stantec

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\Brooklyn Park Restaurants.mxd

The remaining restaurants in Brooklyn Park appear to be intermittently scattered along major thoroughfares, such as 85th Avenue and Brookdale Road, at key intersections. The only other national chain restaurant in Brooklyn Park is a Perkins located 85th Avenue and Highway 81.

SIT-DOWN RESTAURANTS IN BROOKLYN PARK AND SURROUNDING COMMUNITIES

In addition to the restaurants located in Brooklyn Park, Stantec also inventoried and mapped sit-down restaurants located within three to four miles of Brooklyn Park's borders. Restaurants located near Brooklyn Park may have a direct impact on the potential to support new restaurants in Brooklyn Park because it would be easy for them to attract Brooklyn Park residents and workers. The map on the following page displays the location of sit-down restaurants and their type of ownership. Table 3 summarizes the number of restaurants in each district.

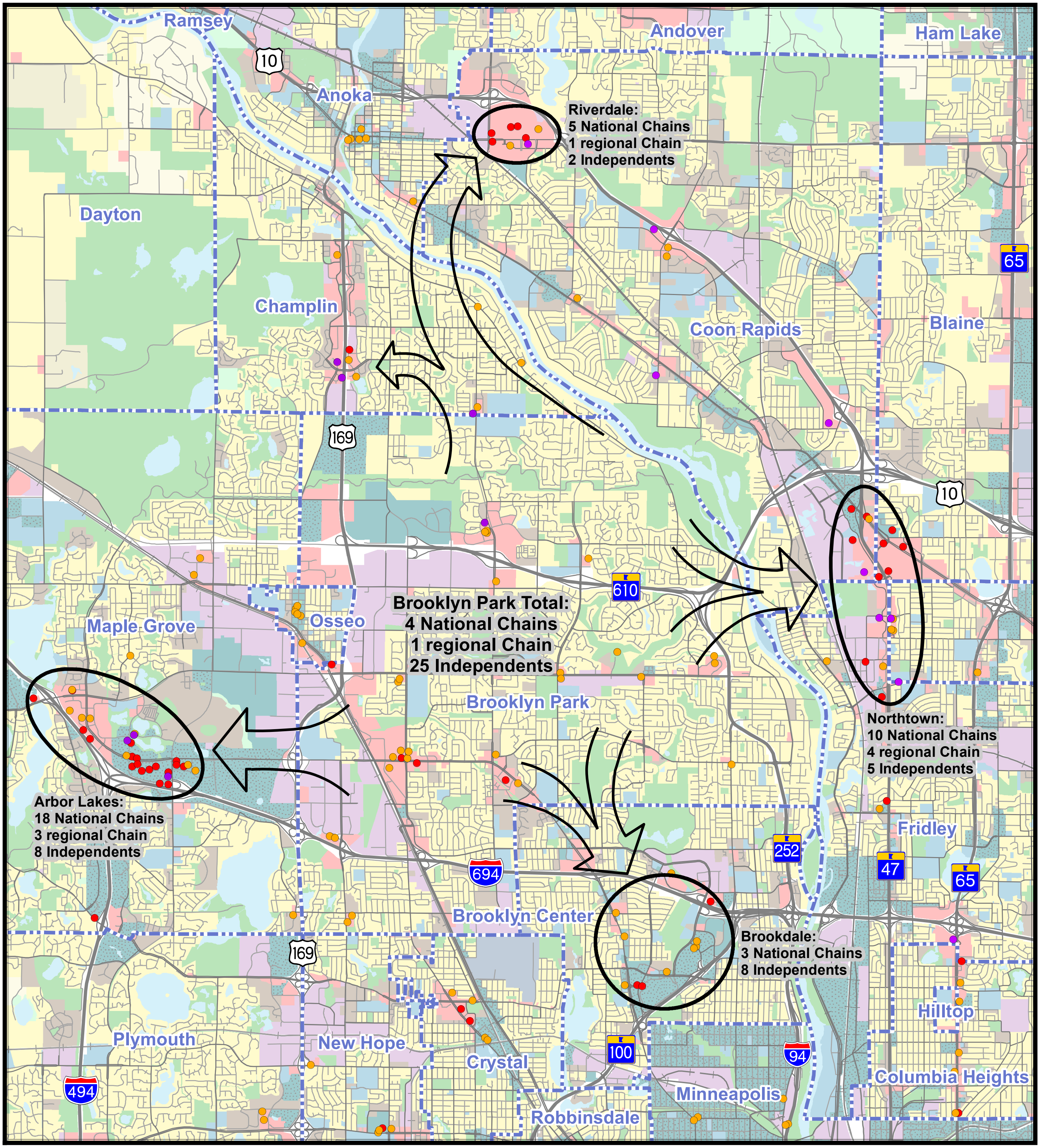
The map indicates that there are four significant restaurant districts located in neighboring communities. These are:

1. **Arbor Lakes (Maple Grove)**: The largest by far is the Arbor Lakes area of Maple Grove, which has a total of 29 sit-down restaurants, 18 of which are national chains. This is more than four times number of national sit-down restaurants located in all of Brooklyn Park. This area has established itself as the dominant regional shopping center for the northwest metro and contains over two million square feet of retail space. Therefore, restaurants in this area are able to capture customers from a very large trade area, including significant portions of western Brooklyn Park. Due to the broad reach of the trade area supporting this district, a number of the chain restaurants located here are hard to find in other parts of the metro area and feature foods that go beyond standard American fare at a good value. Examples of chain restaurants with more niche appeal include Benihana, Biaggi's Ristorante, Bucca di Beppo, California Pizza Kitchen, Claddagh Irish Pub, and PF Chang's.

2. **Northtown**: The next largest restaurant district neighboring Brooklyn Park is located east of the Mississippi in the Northtown area, which includes portions of Blaine, Coon Rapids, Fridley, and Spring Lake Park. This area has 19 sit-down restaurants with 9 national chains. Because this area is located east of the Mississippi River it does not draw as heavily from Brooklyn Park as the Arbor Lakes areas. At one time, Northtown was the dominant retail shopping area of the north metro. However, in recent years, with changing transportation patterns and the development of Riverdale, this area has had to work hard to attract new retailers and maintain market share. Most of the chain sit-down restaurants emphasize value and feature mostly American fare, including Bakers Square, Old Chicago, Old Country Buffet, Olive Garden, Red Lobster, Perkins, Denny's, and IHOP.

3. **Riverdale (Coon Rapids)**: Riverdale, which is located in northern Coon Rapids, does not have as direct an impact on Brooklyn Park residents as the other competitive restaurant districts. It is neither as large as the others nor as conveniently located. Nonetheless, it is a newer development that has begun to attract some major national chains, including IHOP, Boston's Gourmet Pizza, and TGI Friday's.

4. **Brookdale (Brooklyn Center)**: The final neighboring competitive restaurant district is located in the Brookdale area in Brooklyn Center. This area was anchored by a large regional mall for many years only to be supplanted by the Arbor Lakes area for retail dominance. Although the mall no longer exists, the area still enjoys excellent accessibility and visibility and maintains a strong retail presence. There currently are 11 sit-down



Sit-Down Restaurants in Brooklyn Park and Vicinity

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Miles

- National Chain Restaurant
- Regional Chain Restaurant
- Independent Restaurant
- City Limits

- Agricultural
- Rural or Large-Lot Residential
- Single Family Residential
- Multifamily Residential
- Commercial
- Industrial
- Institutional
- Mixed Use
- Multi-Optional Development
- Park and Recreation
- Open Space or Restrictive Use
- Airport
- Vacant or Unknown
- Open Water

February 21, 2012

Stantec

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restaurants in this area with three national chains. The national chains in this are IHOP, Denny's, and Applebee's, which feature American food at modest prices. Redevelopment of the former mall will likely create new restaurant pads that will be attractive to national chains.

Table 3: Sit-Down Restaurants in Neighboring Retail Districts

Community/District	Number of Sit-Down Restaurants National Chain	Regional Chain	Indepen-dent	Total
Brooklyn Park	4	1	25	30
Arbor Lakes (Maple Grove)	18	3	8	29
Riverdale (Coon Rapids)	5	1	2	8
Northtown	10	4	5	19
Brookdale (Brooklyn Center)	3	0	8	11

Sources: City of Brooklyn Park; Stantec; CoStar

Trade Area Analysis

INTRODUCTION

A previous section introduced the general principles used to define restaurant trade areas. This section builds upon this work by identifying the various restaurant trade areas in Brooklyn Park and then analyzing the socio-demographic composition of each trade area. This analysis will serve as the basis for calculating the level of demand for sit-down restaurants in Brooklyn Park.

TRADE AREA DEFINITIONS

Four restaurant trade areas were identified for Brooklyn Park, which are shown in the map on the following page. Three of the four trade areas are centered on the City's largest commercial districts. The fourth trade area is centered on a smaller commercial node at 63rd and Boone Avenue. In addition to the general principles used to define trade areas, the following were taken into consideration when defining each trade area:

WEST BROADWAY AVENUE AND BROOKLYN BOULEVARD TRADE AREA

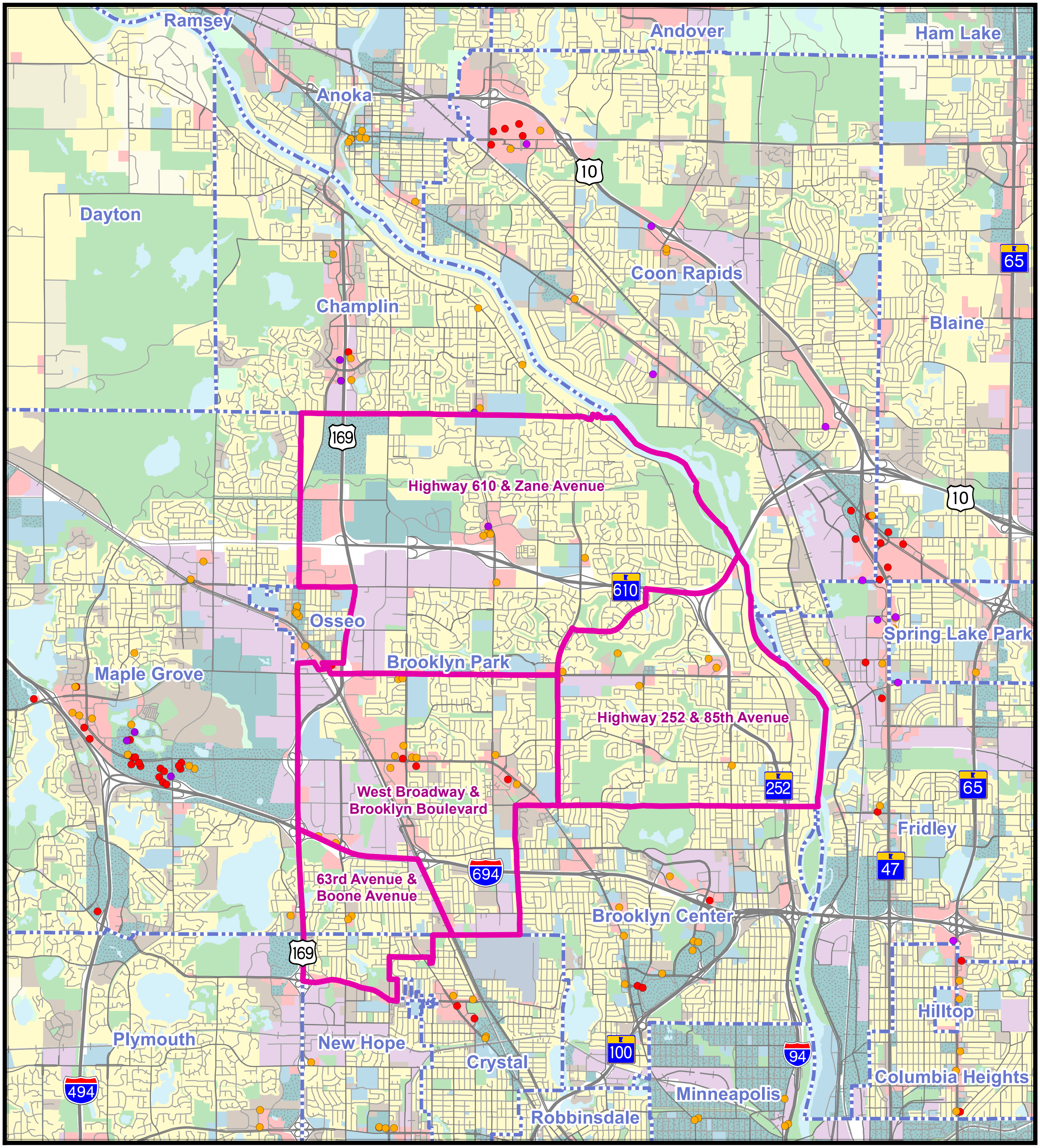
The trade area generally corresponds to a five-minute drive time distance (see drive time maps in Appendix B for each trade area retail node) in each direction from the intersection. The area features a large amount of land currently used for commercial purposes and could likely draw from an even larger trade area. Competitive retail districts to the west (Arbor Lakes) and north (Highway 610 and Zane Avenue), however, limit its size. Furthermore, the area is mostly built up and any significant change would likely need to come about through redevelopment, which is often costly and can be a barrier to reinvestment. Also, there is a somewhat significant retail district located within the trade area along Brooklyn Boulevard between Zane Avenue and Regent Avenue. This trade area contains three national and 10 independent sit-down restaurants. Outside the trade area, but within a 10-minute drive, there are an additional 16 national, four regional, and 14 independent sit-down restaurants.

HIGHWAY 252 AND 85TH AVENUE TRADE AREA

This trade area is bordered by the Mississippi River on the east, Highway 610 on the north, Noble Avenue on the west, and 73rd Avenue on the south. It stretches slightly beyond a five-minute drive time because of the lack of competitive retail districts in the eastern part of Brooklyn Park. However, the Mississippi River to the east and the Brookdale area to the south generally limit the size of this trade area. This area contains eight independent sit-down restaurants and no national chains. Outside the trade area, but within a 10-minute drive, there are an additional 11 chain, five regional, and four independent sit-down restaurants.

HIGHWAY 610 AND ZANE AVENUE TRADE AREA

This trade area encompasses most of the northern half of Brooklyn Park. Large portions of the trade area remain undeveloped and could conceivably accommodate a significant amount of growth in the future. The northern limits of the trade area are generally bounded by the retail district situated along Highway 169 in Champlin. The southern extent of the trade area is bounded by the other two major retail districts in the City. This trade area contains one national, one regional, and six independent sit-down restaurants. Outside the trade area, but within a 10-minute drive, there are an additional four national, two regional, and 16 independent sit-down restaurants.



Brooklyn Park Sit-Down Restaurant Trade Areas

N
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Miles

- National Chain Restaurant
- Regional Chain Restaurant
- Independent Restaurant
- Trade Area Boundary
- City Limits

- Agricultural
- Rural or Large-Lot Residential
- Single Family Residential
- Multifamily Residential
- Commercial
- Industrial
- Institutional

- Mixed Use
- Multi-Optional Development
- Park and Recreation
- Open Space or Restrictive Use
- Airport
- Vacant or Unknown
- Open Water

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63RD AVENUE AND BOONE AVENUE TRADE AREA

This trade area is much smaller than the other three trade areas because it is located south of Interstate 94/694 and is bordered by Highway 169 and Highway 81, thus significantly limiting its draw area. It was determined to make this a separate trade area because of its somewhat isolated location relative to other Brooklyn Park neighborhoods. This trade area also includes a small portion of northern New Hope due to its proximity to the 63rd and Boone Avenue commercial node. This trade area contains four independent sit-down restaurants and another three independent restaurants outside the trade area but within a five-minute drive time.

Table 4: Sit-Down Restaurants in each Trade Area

Brooklyn Park Restaurant Trade Areas	Restaurants within Trade Area			Restaurants Outside Trade Area but Nearby		
	National Chain	Regional Chain	Indepen-dent	National Chain	Regional Chain	Indepen-dent
W Broadway & Brooklyn Blvd	3		10	16	4	14
Highway 252 & 85th Ave			2	11	5	4
Highway 610 & Zane Ave	1	1	6	4	2	16
63rd Ave & Boone Ave			2			3

Source: City of Brooklyn Park; Stantec; CoStar

TRADE AREA DEMOGRAPHICS

Based on the defined restaurant trade areas in Brooklyn Park, Table 5 presents demographic data from the 2010 Census for number of households, household type, household income, and number of workers by wage level. For comparison purposes, Table 5 also presents data for Brooklyn Park, surrounding cities, the 7-County metro area, Minnesota, and the United States. The following are key demographic characteristics of each trade:

WEST BROADWAY AND BROOKLYN BOULEVARD TRADE AREA

- It is the largest trade area with just over 9,600 households
- The household base is significantly younger than the other trade areas with over one-third of all households headed by someone under age 35
- There is a very high proportion of non-traditional family households, which consist mostly of single-parent families
- There is a high concentration of low-income households with 37 percent earning $30,000 or less per year
- It is has nearly 13,000 jobs, the most of the four trade areas
- It is has the highest proportion of well paying jobs with nearly 44 percent earning over $3,333 per month

HIGHWAY 252 AND 85TH AVENUE TRADE AREA

- It is the second largest trade area with nearly 7,500 households
- The age profile is very close to that of the metro area
- The trade area has a slightly above average number of married couple families and a commensurately low number of single-person and roommate households
- Incomes in the trade area are similar to the metro average with slightly higher percentages of those with incomes between $60,000 and $100,000
- The trade area has just over 3,000 workers and a higher proportion of lower-paying jobs

Table 5: 2010 Restaurant Trade Area Demographics

HOUSEHOLD AGE	United States	Minnesota	7-County Metro	Brooklyn Park and Surrounding Communities: Brooklyn Center	Brooklyn Park	Champlin	Crystal	Maple Grove	New Hope	Brooklyn Park Trade Areas: Brdwy & Bklyn Blvd Trade Area	Hwy 252 & 85th Ave Trade Area	Hwy 610 & Zane Ave Trade Area	63rd Ave & Boone Ave Trade Area
All Households	116,716,292	2,087,227	1,117,749	10,756	26,229	8,328	9,183	22,867	8,427	9,627	7,489	7,030	3,724
Age 15-24	5,400,799	99,227	49,736	490	1,269	183	259	365	313	874	180	107	146
Age 25-34	17,957,375	342,878	201,952	2,036	4,932	1,276	1,739	3,602	1,550	2,347	1,109	1,152	546
Age 35-44	21,290,880	368,092	213,981	1,970	5,715	1,765	1,658	5,154	1,463	2,021	1,409	1,953	583
Age 45-54	24,907,064	458,837	253,783	2,186	6,042	2,678	1,965	6,216	1,626	1,876	1,939	1,814	684
Age 55-64	21,340,338	374,568	196,950	1,645	4,649	1,379	1,512	4,610	1,314	1,480	1,675	1,101	638
Age 65-74	13,504,517	220,473	103,345	998	2,055	601	877	1,866	911	685	691	457	412
Age 75-84	8,716,367	151,239	66,268	947	1,145	291	781	777	779	287	392	285	391
Age 85+	3,598,952	71,913	31,734	484	422	155	392	277	471	57	94	161	324
All Households	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Age 15-24	4.6%	4.8%	4.4%	4.6%	4.8%	2.2%	2.8%	1.6%	3.7%	9.1%	2.4%	1.5%	3.9%
Age 25-34	15.4%	16.4%	18.1%	18.9%	18.8%	15.3%	18.9%	15.8%	18.4%	24.4%	14.8%	16.4%	14.7%
Age 35-44	18.2%	17.6%	19.1%	18.3%	21.8%	21.2%	18.1%	22.5%	17.4%	21.0%	18.8%	27.8%	15.7%
Age 45-54	21.3%	22.0%	22.7%	20.3%	23.0%	32.2%	21.4%	27.2%	19.3%	19.5%	25.9%	25.8%	18.4%
Age 55-64	18.3%	17.9%	17.6%	15.3%	17.7%	16.6%	16.5%	20.2%	15.6%	15.4%	22.4%	15.7%	17.1%
Age 65-74	11.6%	10.6%	9.2%	9.3%	7.8%	7.2%	9.6%	8.2%	10.8%	7.1%	9.2%	6.5%	11.1%
Age 75-84	7.5%	7.2%	5.9%	8.8%	4.4%	3.5%	8.5%	3.4%	9.2%	3.0%	5.2%	4.1%	10.5%
Age 85+	3.1%	3.4%	2.8%	4.5%	1.6%	1.9%	4.3%	1.2%	5.6%	0.6%	1.3%	2.3%	8.7%

HOUSEHOLD TYPE	United States	Minnesota	7-County Metro	Brooklyn Park and Surrounding Communities: Brooklyn Center	Brooklyn Park	Champlin	Crystal	Maple Grove	New Hope	Brooklyn Park Trade Areas: Brdwy & Bklyn Blvd Trade Area	Hwy 252 & 85th Ave Trade Area	Hwy 610 & Zane Ave Trade Area	63rd Ave & Boone Ave Trade Area
All Households	116,716,292	2,087,227	1,117,749	10,756	26,229	8,328	9,183	22,867	8,427	9,627	7,489	7,030	3,724
Married with Children	23,588,268	443,212	244,687	1,861	6,498	2,491	1,584	7,123	1,418	1,749	1,775	2,623	593
Married no Children	32,922,109	617,297	298,723	2,487	6,806	2,622	2,434	7,508	2,215	1,712	2,405	2,081	1,028
Other Families	21,027,919	288,506	164,086	2,662	5,459	1,192	1,622	2,591	1,399	2,773	1,411	868	655
Single-Persons	31,204,909	584,008	319,030	2,978	5,848	1,566	2,778	4,415	2,804	2,675	1,500	1,116	1,195
Roommates	7,973,087	154,204	91,223	768	1,618	457	765	1,230	591	718	398	342	253
All Households	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Married with Children	20.2%	21.2%	21.9%	17.3%	24.8%	29.9%	17.2%	31.1%	16.8%	18.2%	23.7%	37.3%	15.9%
Married no Children	28.2%	29.6%	26.7%	23.1%	25.9%	31.5%	26.5%	32.8%	26.3%	17.8%	32.1%	29.6%	27.6%
Other Families	18.0%	13.8%	14.7%	24.7%	20.8%	14.3%	17.7%	11.3%	16.6%	28.8%	18.8%	12.3%	17.6%
Single-Persons	26.7%	28.0%	28.5%	27.7%	22.3%	18.8%	30.3%	19.3%	33.3%	27.8%	20.0%	15.9%	32.1%
Roommates	6.8%	7.4%	8.2%	7.1%	6.2%	5.5%	8.3%	5.4%	7.0%	7.5%	5.3%	4.9%	6.8%

Table 5 (continued): 2010 Restaurant Trade Area Demographics

HOUSEHOLD INCOME	United States	Minnesota	7-County Metro	Brooklyn Park and Surrounding Communities: Brooklyn Center	Brooklyn Park	Champlin	Crystal	Maple Grove	New Hope	Brooklyn Park Trade Areas: Brdwy & Bklyn Blvd Trade Area	Hwy 252 & 85th Ave Trade Area	Hwy 610 & Zane Ave Trade Area	63rd Ave & Boone Ave Trade Area
All Households	116,716,292	2,087,227	1,117,749	10,756	26,229	8,328	9,183	22,867	8,427	9,627	7,489	7,030	3,724
Less than $20,000	21,125,864	316,377	144,973	1,738	3,247	514	1,025	885	1,505	2,350	396	227	573
$20,000 to $29,999	12,471,655	196,544	90,343	1,373	2,359	761	883	777	1,052	1,192	593	185	520
$30,000 to $39,999	11,910,143	200,396	94,939	1,141	2,669	354	745	1,361	797	1,428	765	317	295
$40,000 to $49,999	10,774,997	194,162	95,638	1,240	2,263	514	933	1,498	874	968	631	487	359
$50,000 to $59,999	9,626,257	180,538	90,600	1,155	1,971	700	1,003	1,327	737	818	667	423	202
$60,000 to $74,999	12,035,786	239,344	122,334	1,193	3,324	960	1,262	2,400	899	970	1,079	873	625
$75,000 to $99,999	14,403,376	298,305	164,424	1,619	3,984	1,722	1,610	4,333	1,129	1,122	1,206	1,300	621
$100,000 to $149,999	14,371,152	285,606	182,851	1,017	4,199	2,026	1,376	5,037	1,128	626	1,410	2,000	355
$150,000 or more	9,997,062	175,954	131,646	281	2,212	777	346	5,250	305	153	742	1,217	175
All Households	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Less than $20,000	18.1%	15.2%	13.0%	16.2%	12.4%	6.2%	11.2%	3.9%	17.9%	24.4%	5.3%	3.2%	15.4%
$20,000 to $29,999	10.7%	9.4%	8.1%	12.8%	9.0%	9.1%	9.6%	3.4%	12.5%	12.4%	7.9%	2.6%	14.0%
$30,000 to $39,999	10.2%	9.6%	8.5%	10.6%	10.2%	4.3%	8.1%	6.0%	9.5%	14.8%	10.2%	4.5%	7.9%
$40,000 to $49,999	9.2%	9.3%	8.6%	11.5%	8.6%	6.2%	10.2%	6.5%	10.4%	10.1%	8.4%	6.9%	9.6%
$50,000 to $59,999	8.2%	8.6%	8.1%	10.7%	7.5%	8.4%	10.9%	5.8%	8.7%	8.5%	8.9%	6.0%	5.4%
$60,000 to $74,999	10.3%	11.5%	10.9%	11.1%	12.7%	11.5%	13.7%	10.5%	10.7%	10.1%	14.4%	12.4%	16.8%
$75,000 to $99,999	12.3%	14.3%	14.7%	15.0%	15.2%	20.7%	17.5%	18.9%	13.4%	11.7%	16.1%	18.5%	16.7%
$100,000 to $149,999	12.3%	13.7%	16.4%	9.5%	16.0%	24.3%	15.0%	22.0%	13.4%	6.5%	18.8%	28.5%	9.5%
$150,000 or more	8.6%	8.4%	11.8%	2.6%	8.4%	9.3%	3.8%	23.0%	3.6%	1.6%	9.9%	17.3%	4.7%

EMPLOYMENT BY WAGE LEVEL	United States	Minnesota	7-County Metro	Brooklyn Park and Surrounding Communities: Brooklyn Center	Brooklyn Park	Champlin	Crystal	Maple Grove	New Hope	Brooklyn Park Trade Areas: Brdwy & Bklyn Blvd Trade Area	Hwy 252 & 85th Ave Trade Area	Hwy 610 & Zane Ave Trade Area	63rd Ave & Boone Ave Trade Area
All Workers	--	--	1,542,086	10,985	23,897	3,981	3,923	29,790	11,043	12,857	3,035	7,193	1,057
$1,250 per month or less	--	--	359,306	2,946	7,000	1,234	1,620	9,242	2,446	3,256	917	2,170	253
$1,251-$3,333 per month	--	--	467,252	3,575	7,629	1,508	1,355	9,143	4,112	4,616	972	2,256	440
More than $3,333 per mont	--	--	715,528	4,465	9,268	1,240	948	11,405	4,486	6,109	1,056	3,040	364
All Workers	--	--	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
$1,250 per month or less	--	--	23.3%	26.8%	29.3%	31.0%	41.3%	31.0%	22.1%	23.3%	31.1%	29.1%	23.9%
$1,251-$3,333 per month	--	--	30.3%	32.5%	31.9%	37.9%	34.5%	30.7%	37.2%	33.0%	33.0%	30.2%	41.6%
More than $3,333 per mont	--	--	46.4%	40.6%	38.8%	31.1%	24.2%	38.3%	40.6%	43.7%	35.9%	40.7%	34.4%

Sources: US Census: 2010 Census, 2006-2010 American Community Survey, and Longitudinal Employer-Household Dynamics (LEHD); Metropolitan Council

Highway 610 and Zane Avenue Trade Area

- The trade area has just over 7,000 households
- There is a very high proportion of households age 35 to 54 and married couple families with children
- Conversely, there is a very proportion of single-person households
- Incomes are very high in the trade area with nearly 46 percent of households with incomes of $100,000 or more
- There are roughly 7,200 workers in the trade area with a slightly higher proportion of low-paying jobs

63rd Avenue and Boone Trade Area

- This is the smallest trade area with just over 3,700 households
- The age profile of the trade area is much older than average with over 30 percent of all households age 65 or older
- Household incomes in the trade area are concentrated among very lower-income brackets (those below $30,000) and middle-income brackets (those between $60,000 and $100,000)
- There are just over a 1,000 jobs in the trade area with many concentrated in the category of wages between $1,250 per month and $3,333 per month

TRADE AREA GROWTH PROJECTIONS

Table 6 presents data on projected household and employment growth in each restaurant trade area. Projected growth is a key determinant of how much future market demand will be present in each trade area. The projections are based on Transportation Analysis Zone (TAZ) data from the Met Council. This data is reviewed by planning staff in Brooklyn Park to make sure it is in alignment with the city's comprehensive plan.

According to Table 6, the highway 610 and Zane Avenue trade area will add a significant number of households and employment between 2010 and 2020. Meanwhile, the other trade areas will experience either modest growth or even some declines. This is not surprising given that the northern part of the Brooklyn Park still has large areas available for new development, while the parts of the City are mostly built up and would need to redevelop large areas at much higher densities to achieve significant household or employment growth.

Table 6: Household and Employment Growth Trends
Brooklyn Park Restaurant Trade Areas 2010-2030

Households				Numeric Change		Percent Change	
Trade Areas	2010	2020	2030	2010-2020	2020-2030	2010-2020	2020-2030
W Broadway & Brooklyn Blvd	9,627	9,998	10,729	371	731	3.9%	7.3%
Highway 252 & 85th Ave	7,489	7,497	8,228	8	731	0.1%	9.7%
Highway 610 & Zane Ave	7,030	13,269	14,905	6,239	1,636	88.7%	12.3%
63rd Ave & Boone Ave	3,724	4,058	4,158	334	100	9.0%	2.5%
Employment				Numeric Change		Percent Change	
Trade Areas	2010	2020	2030	2010-2020	2020-2030	2010-2020	2020-2030
W Broadway & Brooklyn Blvd	12,857	12,436	15,642	-421	3,206	-3.3%	25.8%
Highway 252 & 85th Ave	3,035	2,491	3,016	-544	525	-17.9%	21.1%
Highway 610 & Zane Ave	7,193	17,709	27,563	10,516	9,854	146.2%	55.6%
63rd Ave & Boone Ave	1,057	1,197	1,297	140	100	13.2%	8.4%

Sources: Met Council Growth Projections by TAZ; US Census

Restaurant Demand Calculations

INTRODUCTION

This section presents the methodology behind our analysis of the demand for sit-down restaurants in Brooklyn Park. In general, we conducted our analysis by comparing supply variables (restaurant capacity) and demand variables (spending potential) and measuring the difference between the two.

METHODOLOGY

To assess the potential market to support sit-down restaurants in each trade area, data from multiple sources was analyzed. The analysis was accomplished in three phases: 1) an examination of supply-side characteristics (existing competitive sit-down restaurants); 2) a review of demand-side characteristics (current and projected households and their sit-down restaurant spending power); and 3) a measurement of supply and demand to reveal over- or under-saturation of sit-down restaurants in each Brooklyn Park trade area.

SUPPLY-SIDE ANALYSIS

To identify the competitive supply of sit-down restaurants and their locations, data was gathered from two sources: 1) the City of Brooklyn Park provided a list of all restaurants in the City broken down by service level; and 2) a search of the CoStar[2] database for restaurant tenants in commercial buildings located in communities surrounding Brooklyn Park. These lists were combined and restaurants were categorized based on their type of ownership (i.e., national chain, regional chain, or independent). “Sales capacity” of each store was then estimated by multiplying the median sales figure for restaurants (about $275 per square foot according to the Urban Land Institute) by the size of the restaurant. Because several hundred restaurants were identified as part of this study, it was beyond the scope to collect such data for each restaurant. Therefore, an average restaurant size based on type of ownership was used to estimate restaurant size[3], which are as follows: 6,500 square feet for national chain restaurants; 4,200 square feet for regional chain restaurants, and 3,000 for independent restaurants.

It is important to note that these figures are broad estimates. It is also important to note that these figures represent sales capacity of restaurants in the region, and not estimates of actual sales. Actual sales figures for restaurants are extremely difficult to obtain, as they are not publicly available and private data firms such as Dun and Bradstreet are not privy to them. As well, actual sales are less important in this analysis than sales capacity, which is a measure of the potential for operators to capture demand, which, in turn affects the potential for a new entrant.

Once ratios were assigned, annual sales capacity was estimated for each restaurant using the following formula:

Restaurant Size (3,000 sq ft)	X	ULI Sales Ratio ($275/sq ft)	=	Annual Sales Capacity ($825,000)

[2] CoStar is a proprietary database of commercial real estate information.
[3] Urban Land Institute: Dollars & Cents of Shopping Centers

DEMAND-SIDE ANALYSIS

Trade area restaurant demand comes from two primary sources: 1) trade area households; and 2) trade area workers.

HOUSEHOLD DEMAND

The demand-side analysis starts with addressing the amount of demand generated from households as this demand will account for the vast majority of restaurant dollars spent in a given trade area. This was begun by identifying the aggregate household income in each of the US Census tracts that comprise the trade areas[4]. The Census tract level of geography is the only one that holds accurate measures of existing households and workers and their incomes and wages.

Aggregate income in each Census tract was then applied an expenditure rate based on percentage of income[5]. These expenditure rates were applied household income data because not all households have expenditures equal to their income. According to the Consumer Expenditure Survey for 2010, for example, households with incomes in the lowest quintile have expenditures well in excess of their income due to the need to go into debt to cover essential expenses. Conversely, households with incomes in the highest quintile have expenditures well below their household income.

The next broad step was to estimate the percentage of each Census tract's buying power spent on restaurants in 2010. According to the 2010 Consumer Expenditure Survey, households will spend anywhere from 4.8 percent to 5.3 percent of their expenditures at restaurants with lower income households spending less on restaurants than higher income households.

The next step was to determine what proportion of dining expenditures go toward sit-down restaurants. Data from a recently published article[6] on the relationship between income and fast food spending indicates that lower income households will spend 46 percent of their dining dollars at sit-down restaurants, while middle and high income households will spend 51 and 63 percent, respectively, of their dining expenditures at sit-down restaurants.

The final step was to estimate the amount of sit-down restaurant spending among households that occurs outside of the trade area, which would include workplaces, special occasions, travel destinations, among others, and subtract this amount from the trade area total. Because the residential areas included in each of the trade areas generally function as bedroom communities, it is assumed that a significant amount of restaurant spending likely occurs outside of the trade area. For Census tracts with a median household income above the metro area median, it was assumed this percentage was 35. For Census tracts with a median below the metro, it was assumed to be 25 percent.

WORKER DEMAND

Workers in a trade area are another important source of demand for restaurants. Restaurant demand from workers was quantified by first estimating the number of workers in the Census tracts that comprise each trade area using the US Census Longitudinal Employer-Household Dynamics (LEHD). This data set included information on the number of workers by wage level.

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[4] US Census: 2006-2010 American Community Survey

[5] US Bureau of Labor Statistics: Consumer Expenditure Survey (CEX)

[6] French et al., International Journal of Behavioral Nutrition and Physical Activity 2010, 7:77 http://www.ijbnpa.org/content/7/1/77

Once the number of workers and their corresponding wages were determined, then assumptions regarding the proportion of spending that goes toward sit-down dining at or near the workplace were then applied.

The following example illustrates the formula we used to calculate sit-down restaurant spending potential for each trade area:

Households:

Aggregate Income	X	Household Expenditure as Percent of Income (95%)	X	Percent Spent on Dining (5.3%)	X	Percent Spent at Sit-Down Restaurants (51%)	-	Spending at Sit-Down Restaurants Outside the Trade Area (35%)	=	Total Sit-Down Restaurant Purchasing Power

Workers:

Workers	X	Average Annual Wages ($45,000)	X	Percent Spent on Dining (5.3%)	X	Percent Spent at Sit-Down Restaurants (51%)	X	Percent Spent in Trade Area (25%)	=	Total Sit-Down Restaurant Purchasing Power

REVEALING MARKET SATURATION OR OPPORTUNITY

To estimate the amount and location of sit-down restaurant over- or under-supply in each trade area, the amount of supply (i.e., sit-down restaurant sales capacity) in and near each trade area was subtracted from the calculated amount of sit-down restaurant purchasing power. This was calculated for households and workers for 2010 and 2020 to account for projected growth in each trade area. Table 7 and the map on the following page provide summaries of the calculated over- or under-supply in each trade area. Detailed calculations are presented in Tables A1 and A2 in Appendix C. There are two important assumptions to note about the calculations: 1) inflation is not factored into the calculation because it is assumed that all costs associated with restaurant spending and operations will adjust at similar inflationary increases; and 2) the 2020 calculations do not factor in new restaurant development into the supply figure because one of the purposes of the study is to evaluate future opportunities for restaurant.

Table 7: Sit-Down Restaurant Supply and Demand 2010 and 2020

Brooklyn Park Restaurant Trade Areas	2010			2020		
	Supply (sales capacity)	Demand (purch. power)	**Over / Under Supply**	Supply (sales capacity)	Demand (purch. power)	**Over / Under Supply**
W Broadway & Brooklyn Blvd	$20,053,000	$11,005,650	**-$9,047,350**	$20,053,000	$11,228,236	**-$8,824,764**
Highway 252 & 85th Ave	$10,092,500	$10,087,796	**-$4,704**	$10,092,500	$9,990,460	**-$102,040**
Highway 610 & Zane Ave	$11,594,000	$12,178,147	**$584,147**	$11,594,000	$23,854,478	**$12,260,478**
63rd Ave & Boone Ave	$3,547,500	$4,009,178	**$461,678**	$3,547,500	$4,380,951	**$833,451**

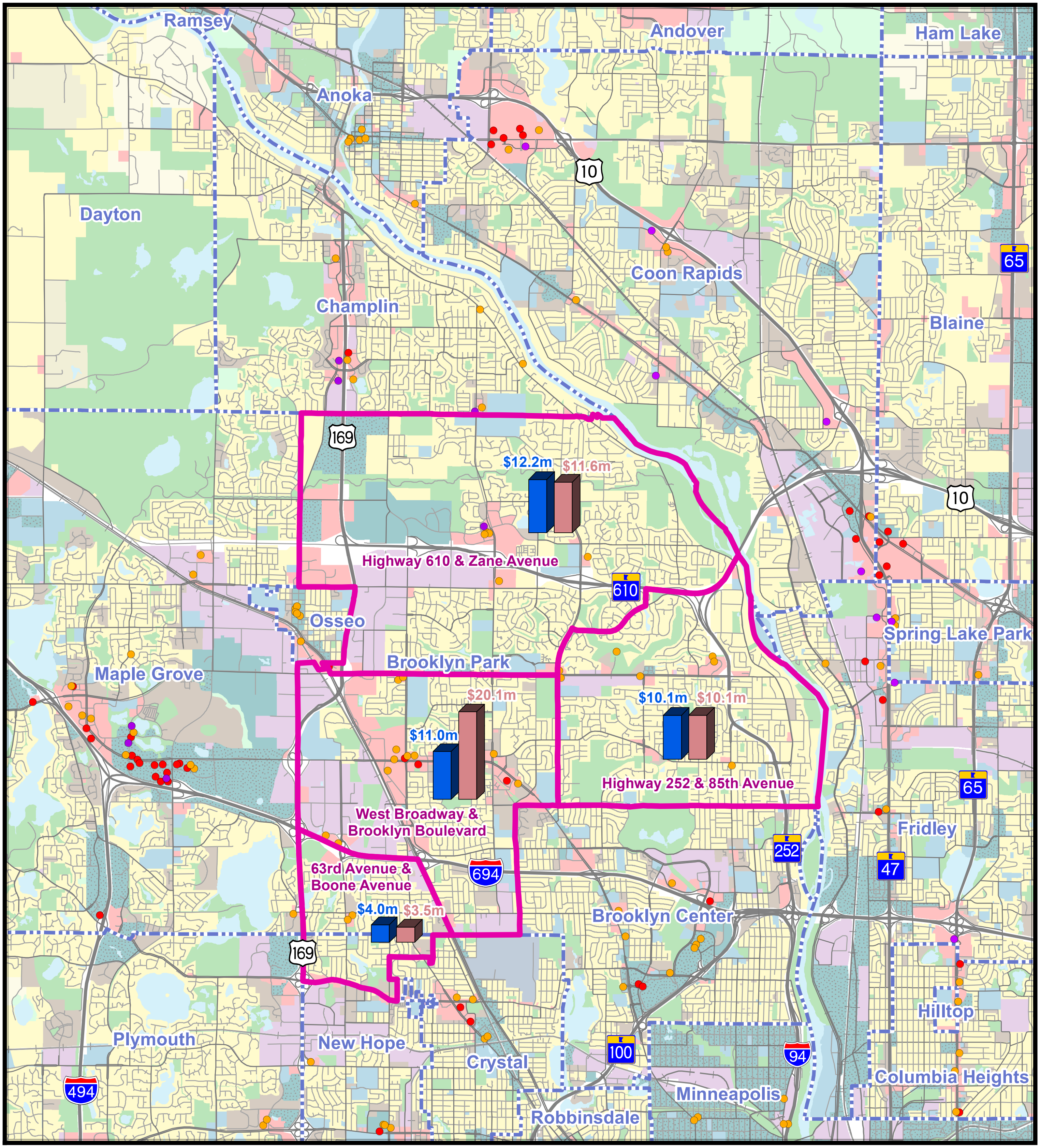
Source: Stantec

CONCLUSIONS

Previous sections of this report addressed the supply and demand for sit-down restaurants in Brooklyn Park by analyzing the type and location of existing restaurants, the shape of the City's retail trade areas, and the existing and projected number of households and workers in each trade area. The following are conclusions drawn from these analyses:

Calculated 2010 demand for sit-down restaurants in Brooklyn Park appears to be met in each of the four defined trade areas. There are, however, important differences among the trade areas. Namely, the trade area around West Broadway and Brooklyn Boulevard appears to be highly saturated due to the impact of nearby Arbor Lakes, which has a very large concentration of national chain sit-down restaurants. The area around Highway 252 and 85th Avenue is almost perfectly in balance between supply and demand. Meanwhile, the areas around 610/Zane Avenue and 63rd/Boone Avenue each have approximately $500,000 in excess purchasing power for sit-down restaurants. However, this amount would only support about 1,800-2,000 square feet of restaurant space, which is smaller than most sit-down restaurants.

With projected increases in the number of households and workers, calculated demand for sit-down restaurants in 2020 will be a marked improvement over 2010. However, the saturated condition of the area around West Broadway and Brooklyn Boulevard will remain as the Arbor Lakes area will continue to have a profound influence on the sit-down restaurant market. The area around Highway 252 and 85th Avenue will experience a slight decrease in demand due to stagnant household growth and a declining job base. This area, however, has significant constraints on the amount of available land for development or redevelopment, which will likely limit the potential for new sit-down restaurants to independent operators or perhaps a regional chain. **The area around Highway 610 and Zane Avenue will experience significant household and employment growth by 2020 that would allow it to support 8 to 12 new sit-down restaurants, several of which could be national chains.**



Brooklyn Park Sit-Down Restaurant Trade Area Supply and Demand

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Miles

- National Chain Restaurant
- Regional Chain Restaurant
- Independent Restaurant
- Supply
- Demand
- Trade Area Boundary
- City Limits

- Agricultural
- Rural or Large-Lot Residential
- Single Family Residential
- Multifamily Residential
- Commercial
- Industrial
- Institutional

- Mixed Use
- Multi-Optional Development
- Park and Recreation
- Open Space or Restrictive Use
- Airport
- Vacant or Unknown
- Open Water

February 21, 2012

Stantec

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Community Assessment and Development Strategies

INTRODUCTION

The main body of work for this market study was to determine the market potential for a full-service restaurant. This section of the study will step back a bit and take a wider look at the City of Brooklyn Park market to establish the strengths and weaknesses that exist within the city for full service restaurants. This includes a summary of interviews with several commercial real estate brokers familiar with Brooklyn Park and the needs of restaurateurs and retail property owners as well as a discussion of important development considerations influencing the City's key retail districts.

COMMERCIAL REALTOR INTERVIEWS[7]

A number of interviews were conducted with commercial real estate brokers familiar with the market for restaurant space in Brooklyn Park and surrounding communities. These interviews provide an additional context to the restaurant market that goes beyond the quantitative analysis presented in previous sections. The following is a summary of the interview responses:

- Sit-down restaurants are losing market share to the rapidly growing fast-casual segment of the restaurant market. As a result, sit-down restaurants are narrowing their approach to a smaller target market that is older and more affluent than what has historically been the sit-down market. Therefore, many sit-down operators, especially chains, are being attracted to areas of interest with unique characteristics and a sense of place.

- There is very little growth, nationally or locally, among chain sit-down restaurants. When chains do expand, they focus on only high-profile retail districts within any metro area. The areas they typically consider are in or near, large regional shopping malls.

- It is often more costly for national chain restaurants to expand into Minnesota because there is no exception to the mininum wage laws for servers. This has increased the barrier to entry into the Minnesota market for many national chains and has resulted in lower demand for new chain sit-down restaurants, especially at second tier locations where supporting demographics and traffic counts are weaker.

- Sit-down restaurants rely on both daytime and evening demand. Brooklyn Park does not have a particularly large daytime employment base, which limits the amount of demand for sit-down restaurants.

- Although Brooklyn Park is seemingly underserved by restaurants, the Arbor Lakes area in Maple Grove draws a lot of households and workers from Brooklyn Park, especially in the western half of the City where daytime employment is concentrated.

- Northern Brooklyn Park, along the Highway 610 corridor, has the greatest potential for new restaurant development, but the demand may not necessarily be there today and likely needs more households and daytime employment.

[7] The comments presented in this section do not necessarily reflect the view of the report authors and are presented here to provide feedback from a variety of persons familiar with the Brooklyn Park real estate market.

- Brooklyn Park is preceived as having strong control over the supply of liquor licenses. Therefore, with a more liberal liquor license policy, there may be more market interest to develop sit-down restaurants.

- Many restaurant operators, including national chains and independents, often look for second generation restaurant space to renovate. These spaces typically have a commercial kitchen in place, which can greatly reduce start-up costs.

- In newly emerging retail areas, such as Highway 610 and Zane Avenue, even if the market is there, chain restaurants are often hesitant to build because no one wants to be the first one to make a leap of faith in an unproven area. Therefore, regional chains or independents are often the first restaurants in an emerging retail area because they are willing to take the risk.

IMPORTANT DEVELOPMENT CONSIDERATIONS

Not all retail markets and sites are conducive to the attraction of restaurants and even fewer are suitable for the attraction of full service restaurants. Like all restaurants, full service restaurants are looking for sites that have good visibility to high traffic roadways, have a large income base within its service area (either through density or incomes), and are surrounded by compatible uses.

However, full service restaurants can't survive with just these site attributes due to the following unique attributes:

RESIDENTIAL CUSTOMER TRAFFIC

Households will generally not frequent a full service restaurant as often as they do a fast food or fast casual restaurant and full service restaurants have longer service times per customer, so fewer customers can be served in an evening for the same amount of seating. This means that more households are necessary in the service area to generate the same number of full service restaurant trips. Full service restaurants adjust for this by seeking locations where there are higher residential densities and income levels are higher.

As with many communities in the same "ring" of development around the central cities, Brooklyn Park's historical residential development patterns have been dominated by traditional single family residential neighborhoods. On their own, the lower densities of single family residential developments tend to struggle with producing enough customer traffic for significant full service restaurant development.

DAYTIME BUSINESS TRAFFIC

Although density and incomes can assist the full service restaurant in the evening, this still does not address the problem of the lack of customer turnover with full service restaurants. Full service restaurants adjust for this by seeking customer traffic during other periods, usually lunch.

The lunch time traffic at all restaurants is highly dependent on the number of jobs in close proximity to the site, but full service restaurants need to have a higher proportion of well paid, professional jobs, since these customers are more likely to have business lunch/dinner meetings, be willing to pay a larger bill and have the job flexibility to eat a meal that may take longer than an hour to finish. In contrast, most industrial employment does not have this same worker profile.

The business customers provide an additional benefit as well. Business restaurant trips occur during the work week, while residential restaurant trips tend to occur more frequently on the weekends, helping to smooth out customer demand and leading to fuller utilization of the facility.

The recent development of the Target campus is a major step in the direction of increasing the amount of professional employment in Brooklyn Park but more office development will likely be necessary before significant full service restaurant activity will occur. Still, it has likely already had an impact at the Hwy 610/Zane commercial district where there is a bit more full service restaurant activity than would normally be expected given the surrounding retail and residential uses.

RETAIL MIX

Retail shopping centers develop because it is beneficial for all stores to try to attract the maximum number of customers to the center where they can be shared among all of the retail uses. Customers will travel further to patronize shopping centers with a greater variety of products.

Full service restaurants are also more particular than other restaurants when it comes to cotenancy. A full service restaurant does not benefit as much from a grocery anchored shopping center because customers will generally not patronize a full service restaurant while they have perishable goods in the car. As big box discount stores increase their grocery offerings, Target and Wal-Mart are also beginning to function as large grocery stores as well.

Full service restaurants benefit from cotenancy with soft goods and specialty retailers, particularly ones that draw from larger trade areas to drive distant customers to the restaurant. One particularly attractive specialty retail sector for full service restaurants is entertainment, which can have a wide trade area. Entertainment can include uses such as theaters, tourist areas and nightclubs, but can also include areas that provide a higher amenity level of retail experience to expand the trade area. Examples of this type of retail includes Arbor Lakes, The West End, Excelsior & Grand, Mall of America, Centennial Lakes, Stillwater, Burnsville Heart of the City, Downtown Anoka and others.

Brooklyn Park's existing retail centers are dominated by grocery and discount store dominated retail which is not likely to generate significant interest from full service restaurants. Future development at the Hwy 610/Zane interchange could have the potential to offer a wider variety of retail on the vacant parcels.

STREET TRAFFIC

Another way that full service restaurants attract more customers is by locating along streets with higher traffic counts to pull additional customers from outside the normal service area. The Arbor Lakes region of Maple Grove is reasonably close to Brooklyn Park and therefore has many similar attributes. However, Arbor Lakes is located at the key I-494/I-694 interchange area and therefore has vastly superior traffic profiles. In Arbor Lakes, I-694 has approximately 110,000 cars per day, I-494 has approximately 80,000, Hemlock has over 30,000 and even Elm Creek Boulevard has almost 23,000 trips. In comparison, the following are traffic counts for some of the main retail districts in Brooklyn Park:

Shopping Area	*Street Frontage*	*Traffic Count*
Hwy 610/Zane	Hwy 610	48,000
	Zane	17,000
Hwy 252/85th	Hwy 252	53,000
	85th	17,000
Brooklyn Blvd/Broadway	CR 81	22,000
	Brooklyn Blvd.	22,000
	Broadway	16,000

Although these Brooklyn Park roadways have significant traffic counts and serve a valuable transportation purpose, they do not currently have enough traffic to provide a compelling traffic count reason for a full service restaurant to choose to locate in Brooklyn Park rather than in other nearby areas.

The City's historical retail land use planning has been to locate retail development on major collector roadways like 85th and Brooklyn Blvd where they will largely serve the local population rather than the greater region. This type of retail development pattern tends to favor retail uses that serve customers in a smaller trade area with more frequent trips and are usually anchored by a grocery store, drug store or a large box discounter like Target or Wal-Mart. Restaurants in neighborhood oriented centers will be heavily weighted towards fast food or fast casual categories. Soft goods (clothing, etc.), home furnishings, specialty retailers and full service restaurants shy away from these types of neighborhood oriented centers.

In the past, Brooklyn Park may have been able to develop a retail area with a larger trade area and greater variety of retail options along I-694, either at Hwy 169 or to a lesser extent, along CR 81. However, plans at that time guided those areas for employment and residential uses. It should be noted that at the time those land use decisions were being made, the I-694 and Hwy 169 area wouldn't have had anywhere near the traffic levels that it does today and would have been located at the development fringe, much like the current situation at Hwy 610 and Hwy 169. In Maple Grove, the retail development areas were protected from development by active mining, so by the time they were available for development, the sites were no longer on the development fringe.

CHAIN VS. LOCAL OPERATOR RESTAURANTS

Full service restaurants can be developed as chain restaurants or by a local operator. Chain restaurants are generally preferred by retail developers because their financial capabilities are well known, which simplifies bank financing. In addition, there is a reasonable expectation that the restaurant chain has a very good idea of its customer base, food product, and operational processes so that the chance of its failing and dragging down the center is minimized.

Local operator restaurants that succeed have the potential to introduce a unique and popular dining experience that attracts customers from a large trade area. Unfortunately, they also have a perception of higher chance of failure and can make banks hesitant to lend. This is one reason why local operator restaurants tend to start in standalone or existing buildings rather than in new, greenfield developments.

The Brooklyn Park market may be more attractive for local operator restaurants rather than chain restaurants due to the close proximity to Maple Grove. For many full service restaurants, the trade area in Maple Grove and Brooklyn Park may overlap, raising concerns that they will split the trade area and harm sales at both locations. Local operator restaurants, however, may be unable to get access to the Arbor Lakes market, either because of the rental rates or their lack of marketable credit.

OTHER CONSIDERATIONS

One of the intangible aspects that could also be holding back full service restaurant development at the Zane interchange is the large amount of vacant land around the Hwy 610 and Hwy 169 interchange. The City's Comprehensive Plan does not identify this area for retail development, but these sites have superior retail viability due to the increased traffic counts and visibility from Hwy 169. Most retailers would likely rather locate in this area than at Zane.

One concern that any retail developer or restaurant owner would have at this stage in the City's growth is that they would make an investment at Zane and then another developer would convince a future City Council to rezone one of the key Hwy 169/Hwy 610 for a larger scale retail development that would take away the customer base from Zane.

For full service restaurants, there would also be the concern that even with the MX designation, there could one day be large scale office development at the interchange that would generate supporting restaurant development in a location with closer proximity to businesses and superior visibility. Similar developments have occurred along the I-494, I-394 and Hwy 212 employment centers. However, given the early stage in that area's development, there is likely not enough supporting employment development in the area now for a full service restaurant operator to open at Hwy 610/Hwy 169 on its own at this time.

RECOMMENDED DEVELOPMENT STRATEGIES

Based on the current and projected calcuated demand for sit-down restaurant space and the real estate issues noted above, the following are receommended development strategies that the City of Brooklyn Park may consider when trying to attract national chain sit-down restaurants.

1. The area that seems to be the most suitable for future sit-down restaurants is along the Hwy 610/Hwy 169 corridors. These areas have the potential to provide the traffic, visibility, and daytime employment necessary to support sit-down restaurants. Any efforts to attract a sit-down restaurant should be concentrated in this area. Developers should be encouraged at early stages in the development process to consider the possibility of including a sit-down restaurant in their development concept.

2. Sit-down restaurants are more concerned with creating a quality dining experience for its customers than other types of restaurants. Sit down restaurants are often developed with higher quality materials and amenities, including natural stone, upgraded lighting, natural woods, accent metals, stained glass and even fireplaces. This higher level of finish adds value to the operation by encouraging customers to be more willing to spend more time at the restaurant and generate a larger bill.

   This desire for higher amenity and creating a quality dining experience does not end at the front door of the restaurant. Retail areas can be made more conducive to sit-down restaurants by increasing the level of amenity, particularly landscaping and water treatment.

Stormwater systems and landscaping that provide additional amenity for a sit-down restaurant

Functional stormwater system that does not provide additional amenity for a sit-down restaurant

The City should review the design standards for retail development to determine if adequate levels of amenity are being required to create the sorts of retail spaces that would support sit-down restaurants.

3. Sit-down restaurants in suburban markets do not typically like to be in strip retail and prefer standalone sites. Retail developers should be encouraged to leave a highly visible lot within the retail development that could support a sit-down restaurant.

4. Fast food restaurants can often outbid sit-down restaurants for development sites because of their high frequency turnover and use of drive through lanes to increase the number of customers served beyond what can be physically accommodated within the building. In addition, the presence of fast food can reduce the dining character that would attract sit-down restaurants. Some cities have attempted to mitigate this situation by limiting the areas where drive through lanes are permitted for restaurants. This can be effective, but can also generate opposition both from the public and developers so any recommendation of this type needs to be based on a solid planning grounds with significant opportunities for stakeholder input.

5. The Hwy 610/Hwy 169 interchange area could benefit from more detailed design work than what typically occurs at the comprehensive planning level. The main focus of this conceptual design work would be to establish a clear identity within the development community for that key location so that the City's vision is understood clearly and developers and restaurant owners can plan accordingly. In addition, a preliminary master plan could identify opportunities to create a high amenity space within the future office uses that would be attractive to sit-down restaurants. An older example of this is the Centennial Lakes project in Edina where stormwater management was integrated into other design features to create a destination environment. More recently, the West End development in St. Louis Park was created which is tied closely into future office towers.

   A key will be to provide a series of conceptual elevations so that developers, restaurant owners, and the public at large can easily visualize the City's vision and intent. This does not mean to imply that detailed and inflexible design principles need to be employed, but rather images of key elements that demonstrate the desired types of destination amenities.

Appendix A: Restaurant List

Type	Ownership	Name	Address	City	State	Zip
Fast/Casual	Independent	Avant Garden	213-215 E Main St	Anoka	MN	55303
Fast/Casual	Independent	Downstairs Deli, The	300 E Main St	Anoka	MN	55303
Fast/Casual	National Chain	Culver's	800 W Main St	Anoka	MN	55303
Fast/Casual	National Chain	Dairy Queen	424 W Main St	Anoka	MN	55303
Fast/Casual	National Chain	Hardee's	703 E Main St	Anoka	MN	55303
Fast/Casual	National Chain	Subway	228 E Main St	Anoka	MN	55303
Fast/Casual	National Chain	Taco Bell	647 W Main St	Anoka	MN	55303
Sit Down/Full Service	Independent	Frisky's Restaurant & Patio	821 E River Rd	Anoka	MN	55303
Sit Down/Full Service	Independent	G 's Cafe	222 E Main St	Anoka	MN	55303
Sit Down/Full Service	Independent	Millers Anoka Cafe	1918-1920 1st Ave	Anoka	MN	55303
Sit Down/Full Service	Independent	Sparky's Cafe	12 NW Bridge Sq	Anoka	MN	55303
Sit Down/Full Service	Independent	The Mad Hatter Tea Room	300 E Main St	Anoka	MN	55303
Sit Down/Full Service	Independent	Top Shelf Bar And Grill	229 Jackson St	Anoka	MN	55303
Take Out/No Seating	National Chain	Domino's Pizza	2350 7th Ave	Anoka	MN	55303
Take Out/No Seating	National Chain	Little Caesars	1100 W Main St	Anoka	MN	55303
Take Out/No Seating	National Chain	Pizza Man	504-516 E River Rd	Anoka	MN	55303
Fast/Casual	National Chain	Arby's	619 NE County Road 10	Blaine	MN	55434
Fast/Casual	National Chain	Buffalo Wild Wings	398 Northtown Dr	Blaine	MN	55434
Fast/Casual	National Chain	Buffalo Wild Wings	76 NE Northtown Dr	Blaine	MN	55434
Fast/Casual	National Chain	Chipotle	599 Northtown Dr NE	Blaine	MN	55434
Fast/Casual	National Chain	Dairy Queen	398 Northtown Dr	Blaine	MN	55434
Fast/Casual	National Chain	Potbelly Sandwich Works	398 Northtown Dr	Blaine	MN	55434
Fast/Casual	National Chain	Steak Escape	398 Northtown Dr	Blaine	MN	55434
Fast/Casual	National Chain	Subway	636-784 County Road 10 NE	Blaine	MN	55434
Fast/Casual	National Chain	Subway	398 Northtown Dr	Blaine	MN	55434
Fast/Casual	National Chain	Taco Bell	291 NE County Road 10	Blaine	MN	55434
Fast/Casual	National Chain	Taco John's	398 Northtown Dr	Blaine	MN	55434
Fast/Casual	National Chain	Wendy's	8780 NW University Ave	Blaine	MN	55434
Fast/Casual	Regional Chain	Leann Chin	8943-8949 University Ave NE	Blaine	MN	55434
Sit Down/Full Service	National Chain	Bakers Square Restaurant & Pies	221 NE County Road 10	Blaine	MN	55434
Sit Down/Full Service	National Chain	Chuck E. Cheese's	8943-8949 University Ave NE	Blaine	MN	55434
Sit Down/Full Service	National Chain	Old Chicago	198 NE Northtown Dr	Blaine	MN	55434
Take Out/No Seating	National Chain	Orange Julius	398 Northtown Dr	Blaine	MN	55434
Take Out/No Seating	National Chain	Papa John's	405-551 NE 87th Ln	Blaine	MN	55434
Take Out/No Seating	National Chain	Papa Murphy's	636-784 County Road 10 NE	Blaine	MN	55434
Fast/Casual	Independent	A1 African Marketplace & Deli	6800-6842 N Humboldt Ave	Brooklyn Center	MN	55430
Fast/Casual	Independent	Hiett Chenh Deli	6201 Brooklyn Blvd	Brooklyn Center	MN	55429
Fast/Casual	National Chain	Arby's	5444 Brooklyn Blvd	Brooklyn Center	MN	55429
Fast/Casual	National Chain	Burger King	3201 County Rd 10	Brooklyn Center	MN	55429
Fast/Casual	National Chain	Caribou Coffee	3900 Lake Breeze Ave	Brooklyn Center	MN	55429
Fast/Casual	National Chain	Caribou Coffee	5711-5717 N Xerxes Ave	Brooklyn Center	MN	55430
Fast/Casual	National Chain	Culver's	6900 Brooklyn Blvd	Brooklyn Center	MN	55429
Fast/Casual	National Chain	Jimmy John's	615 66th Ave N	Brooklyn Center	MN	55430
Fast/Casual	National Chain	KFC	5430 Brooklyn Blvd	Brooklyn Center	MN	55429
Fast/Casual	National Chain	McDonald's	5525 N Xerxes Ave	Brooklyn Center	MN	55430
Fast/Casual	National Chain	Panera Bread	6050 Shingle Creek Pky	Brooklyn Center	MN	55430
Fast/Casual	National Chain	Starbucks	5512 Brooklyn Blvd	Brooklyn Center	MN	55429
Fast/Casual	National Chain	Subway	6930 Brooklyn Blvd	Brooklyn Center	MN	55429
Fast/Casual	National Chain	Subway	6912-6920 Brooklyn Blvd	Brooklyn Center	MN	55429
Fast/Casual	National Chain	Subway	5711-5717 N Xerxes Ave	Brooklyn Center	MN	55430
Fast/Casual	National Chain	Taco Bell	5532 Brooklyn Blvd	Brooklyn Center	MN	55429
Fast/Casual	National Chain	Wendy's	5545 N Xerxes Ave	Brooklyn Center	MN	55430
Fast/Casual	Regional Chain	Davanni's	5937 Summit Dr	Brooklyn Center	MN	55430
Fast/Casual	Regional Chain	Leann Chin	5711-5717 N Xerxes Ave	Brooklyn Center	MN	55430
Sit Down/Full Service	Independent	50's Grill	5637 Brooklyn Blvd	Brooklyn Center	MN	55429
Sit Down/Full Service	Independent	Familia Mexican Buffet	6000-6048 Shingle Creek Pky	Brooklyn Center	MN	55430
Sit Down/Full Service	Independent	Great India	6050 Shingle Creek Pky	Brooklyn Center	MN	55430
Sit Down/Full Service	Independent	Jake's Sports Cafe	5216 W Broadway Ave	Brooklyn Center	MN	55429
Sit Down/Full Service	Independent	New King Buffet	5927 John Martin Dr	Brooklyn Center	MN	55430
Sit Down/Full Service	Independent	Oak City Grill & Tavern	2590 Freeway Blvd	Brooklyn Center	MN	55430
Sit Down/Full Service	Independent	Que Viet	6100 Brooklyn Blvd	Brooklyn Center	MN	55429
Sit Down/Full Service	Independent	Super Asian Buffet	6300 Brooklyn Blvd	Brooklyn Center	MN	55429
Sit Down/Full Service	Independent	The Mystery Café	5701 Shingle Creek Pky	Brooklyn Center	MN	55430
Sit Down/Full Service	National Chain	Applebee's	1400 N Brookdale Ctr	Brooklyn Center	MN	55430
Sit Down/Full Service	National Chain	Denny's Restaurant	6405 N James Cir	Brooklyn Center	MN	55430
Sit Down/Full Service	National Chain	IHOP	5601 N Xerxes Ave	Brooklyn Center	MN	55430
Take Out/No Seating	Independent	Scoreboard Pizza	6800-6842 N Humboldt Ave	Brooklyn Center	MN	55430
Take Out/No Seating	National Chain	Little Caesars	5605 N Xerxes Ave	Brooklyn Center	MN	55430
Take Out/No Seating	National Chain	Pizza Hut	5804-5810 N Xerxes Ave	Brooklyn Center	MN	55430
Take Out/No Seating	National Chain	WingStreet	5804-5810 N Xerxes Ave	Brooklyn Center	MN	55430

Type	Ownership	Name	Address	City	State	Zip
Fast/Casual	Independent	Kim Anh Vietnamese Cuisine	8584 Edinburgh Center Dr	Brooklyn Park	MN	0
Fast/Casual	Independent	Wagner's Drive In	7000 West Broadway	Brooklyn Park	MN	0
Fast/Casual	National Chain	Arby's	8016 Brooklyn Blvd	Brooklyn Park	MN	55445
Fast/Casual	National Chain	Burger King	8510 N Edinburgh Center Dr	Brooklyn Park	MN	55443
Fast/Casual	National Chain	Burger King	8501 N Xylon Ave	Brooklyn Park	MN	55445
Fast/Casual	National Chain	Caribou Coffee	7625-7655 Jolly Ln N	Brooklyn Park	MN	55428
Fast/Casual	National Chain	Caribou Coffee	8555-8595 N Edinburgh Center D	Brooklyn Park	MN	55443
Fast/Casual	National Chain	Caribou Coffee	9610-9638 Colorado Ln N	Brooklyn Park	MN	55445
Fast/Casual	National Chain	Chipotle	7625-7655 Jolly Ln N	Brooklyn Park	MN	55428
Fast/Casual	National Chain	Dairy Queen	8555-8595 N Edinburgh Center D	Brooklyn Park	MN	55443
Fast/Casual	National Chain	Dairy Queen	7749 N Zane Ave	Brooklyn Park	MN	55443
Fast/Casual	National Chain	Godfathers Pizza	7450 N Unity Ave	Brooklyn Park	MN	55443
Fast/Casual	National Chain	Jimmy John's	9670 Colorado Ln N	Brooklyn Park	MN	0
Fast/Casual	National Chain	KFC	8540 N Edinburgh Center Dr	Brooklyn Park	MN	55443
Fast/Casual	National Chain	KFC	8025 Brooklyn Blvd	Brooklyn Park	MN	55445
Fast/Casual	National Chain	McDonald's	1480 N 85th Ave	Brooklyn Park	MN	55444
Fast/Casual	National Chain	McDonald's	9000 85th Ave N	Brooklyn Park	MN	55445
Fast/Casual	National Chain	McDonald's	7685 West Broadway	Brooklyn Park	MN	0
Fast/Casual	National Chain	Panda Express	7645 Jolly Ln N	Brooklyn Park	MN	0
Fast/Casual	National Chain	Rocky Rococo	7540 Brooklyn Blvd	Brooklyn Park	MN	55443
Fast/Casual	National Chain	Starbuck's Coffee (in Target)	7535 West Broadway	Brooklyn Park	MN	0
Fast/Casual	National Chain	Subway	8517-8523 N Zane Ave	Brooklyn Park	MN	55443
Fast/Casual	National Chain	Subway	9530-9590 N Noble Pky	Brooklyn Park	MN	55443
Fast/Casual	National Chain	Subway	1400-1460 N 85th Ave	Brooklyn Park	MN	55444
Fast/Casual	National Chain	Subway	8024-8078 Brooklyn Blvd	Brooklyn Park	MN	55445
Fast/Casual	National Chain	Subway	8000 N Lakeland Ave	Brooklyn Park	MN	55445
Fast/Casual	National Chain	Taco Bell	8530 N Edinburgh Center Dr	Brooklyn Park	MN	55443
Fast/Casual	National Chain	Taco Bell	8575 N Aspen Ln	Brooklyn Park	MN	55445
Fast/Casual	National Chain	Wendy's	7445 N 71st Ave	Brooklyn Park	MN	55428
Fast/Casual	National Chain	White Castle	7741 N Zane Ave	Brooklyn Park	MN	55443
Fast/Casual	Regional Chain	Angeno's Pizza	3100-3350 N Brookdale Dr	Brooklyn Park	MN	55443
Fast/Casual	Regional Chain	Leann Chin	8069 Brooklyn Blvd	Brooklyn Park	MN	55445
Sit Down/Full Service	Independent	African Forest	7648 Humboldt Ave N	Brooklyn Park	MN	0
Sit Down/Full Service	Independent	America's Harvest (in Northland Inn)	7025 Northland Dr	Brooklyn Park	MN	0
Sit Down/Full Service	Independent	Blondie's Sports Bar and Grill	7495 Brooklyn Blvd	Brooklyn Park	MN	0
Sit Down/Full Service	Independent	China Star Restaurant	6262-6278 Boone Ave N	Brooklyn Park	MN	55428
Sit Down/Full Service	Independent	Ciento's Tequila Bar	9660 Colorado Ln N	Brooklyn Park	MN	0
Sit Down/Full Service	Independent	Fat Nat's Eggs	8587 Edinburgh Center Dr	Brooklyn Park	MN	0
Sit Down/Full Service	Independent	General Pancho Villa	7944-7794 Brooklyn Blvd	Brooklyn Park	MN	55445
Sit Down/Full Service	Independent	Girvan Grille	8700 Edinburgh Crossing	Brooklyn Park	MN	55443
Sit Down/Full Service	Independent	Golden Dragon Restaurant	8401-8471 W Broadway Ave	Brooklyn Park	MN	55445
Sit Down/Full Service	Independent	Jack's Bakery & Coffee Shop	8401-8471 W Broadway Ave	Brooklyn Park	MN	55445
Sit Down/Full Service	Independent	Kelly's 19th Hole	8432 Noble Ave	Brooklyn Park	MN	0
Sit Down/Full Service	Independent	Kelly's Restaurant	8517 63rd Ave N	Brooklyn Park	MN	0
Sit Down/Full Service	Independent	Lemon Grass Thai	8600 Edinburgh Center Dr	Brooklyn Park	MN	0
Sit Down/Full Service	Independent	Mad Jack's Sports Cafe	8078 Brooklyn Blvd	Brooklyn Park	MN	55445
Sit Down/Full Service	Independent	Mama Ti's African Kitchen	7800 Zane Ave N	Brooklyn Park	MN	0
Sit Down/Full Service	Independent	Mandarin	4600-4674 85th Ave N	Brooklyn Park	MN	55443
Sit Down/Full Service	Independent	Morgan's in the Park	9690 Colorado Ave N	Brooklyn Park	MN	0
Sit Down/Full Service	Independent	Panda Garden Buffet	8089 Brooklyn Blvd	Brooklyn Park	MN	0
Sit Down/Full Service	Independent	Phuong Trong Restaurant	8072 Brooklyn Blvd	Brooklyn Park	MN	0
Sit Down/Full Service	Independent	Shang Hai Chan's Chinese Restauran	9640 Colorado Ln N	Brooklyn Park	MN	55455
Sit Down/Full Service	Independent	Sweet Basil Asian Cuisine	9310-9334 N Zane Ave	Brooklyn Park	MN	55443
Sit Down/Full Service	Independent	Sweet Taste Of Italy	9530-9590 N Noble Pky	Brooklyn Park	MN	55443
Sit Down/Full Service	Independent	Thanh Vi Restaurant	3023 85th Ave N	Brooklyn Park	MN	0
Sit Down/Full Service	Independent	Vietnam House	7962 Brooklyn Blvd	Brooklyn Park	MN	0
Sit Down/Full Service	Independent	Wadsworth's (in Northland Inn)	7025 Northland Dr	Brooklyn Park	MN	0
Sit Down/Full Service	National Chain	Applebee's	7901 Brooklyn Blvd	Brooklyn Park	MN	0
Sit Down/Full Service	National Chain	Bakers Square Restaurant & Pies	8000 Brooklyn Blvd	Brooklyn Park	MN	55445
Sit Down/Full Service	National Chain	Brunswick Zone (Bar and Grill)	7545 Brooklyn Blvd	Brooklyn Park	MN	0
Sit Down/Full Service	National Chain	Perkins	8585 N Aspen Ln	Brooklyn Park	MN	55445
Sit Down/Full Service	Regional Chain	Sammy Perrellas Pizza & Restau	9750-9774 Schreiber Ter	Brooklyn Park	MN	55445
Take Out/No Seating	Independent	China Bowl	9546 Noble Pkwy	Brooklyn Park	MN	0
Take Out/No Seating	Independent	China Hope	1400-1460 N 85th Ave	Brooklyn Park	MN	55444
Take Out/No Seating	Independent	El Baraka Market and Grill	6217 West Broadway	Brooklyn Park	MN	0
Take Out/No Seating	Independent	Jay's Fish and Chicken House	5708 Brookdale Dr	Brooklyn Park	MN	0
Take Out/No Seating	Independent	JJ's Fish N Chicken	7615 West Broadway	Brooklyn Park	MN	0
Take Out/No Seating	Independent	Koom Siab Grocery & Deli	1506 Brookdale Dr	Brooklyn Park	MN	0
Take Out/No Seating	Independent	Tran Anh Food to Go	8038 Brooklyn Blvd	Brooklyn Park	MN	0
Take Out/No Seating	National Chain	Domino's Pizza	9310-9334 N Zane Ave	Brooklyn Park	MN	55443
Take Out/No Seating	National Chain	Domino's Pizza	3100-3350 N Brookdale Dr	Brooklyn Park	MN	55443
Take Out/No Seating	National Chain	Little Caesars	7535-7641 W Broadway	Brooklyn Park	MN	55428
Take Out/No Seating	National Chain	Little Caesars	8555-8595 N Edinburgh Center D	Brooklyn Park	MN	55443
Take Out/No Seating	National Chain	Papa John's	4600-4674 85th Ave N	Brooklyn Park	MN	55443
Take Out/No Seating	National Chain	Papa Murphy's	8570 Edinburgh Center Dr	Brooklyn Park	MN	55443
Take Out/No Seating	National Chain	Pizza Hut	2845-2997 Brookdale Dr	Brooklyn Park	MN	55444
Take Out/No Seating	National Chain	Seattle Sutton's Healthy Eating	4600-4674 85th Ave N	Brooklyn Park	MN	55443

Type	Ownership	Name	Address	City	State	Zip
Fast/Casual	Independent	Cafe Donuts & Kaleibo Scoops Icecre	11175 N Commerce Dr	Champlin	MN	55316
Fast/Casual	National Chain	Arby's	11978 N Business Park Blvd	Champlin	MN	55316
Fast/Casual	National Chain	Buffalo Wild Wings	11580 Theater Dr	Champlin	MN	55316
Fast/Casual	National Chain	Caribou Coffee	11450-11468 Jefferson Ct	Champlin	MN	55316
Fast/Casual	National Chain	Dairy Queen	11200 N Aquila Dr	Champlin	MN	55316
Fast/Casual	National Chain	Jimmy John's	11468 Marketplace Dr	Champlin	MN	55316
Fast/Casual	National Chain	McDonald's	12321 Champlin Dr	Champlin	MN	55316
Fast/Casual	National Chain	Subway	110-180 Miller Rd	Champlin	MN	55316
Fast/Casual	National Chain	Subway	11351 N Aquila Dr	Champlin	MN	55316
Fast/Casual	National Chain	Wendy's	11406 N Marketplace Dr	Champlin	MN	55316
Sit Down/Full Service	Independent	5-8 Grill	6251 Douglas Ct N	Champlin	MN	55316
Sit Down/Full Service	Independent	Buono Sera Ristorante	11949 West River Road	Champlin	MN	55316
Sit Down/Full Service	Independent	Enjoy China	11420-11464 N Marketplace Dr	Champlin	MN	55316
Sit Down/Full Service	Independent	Hudy's Cafe	11350 Aquila Dr N	Champlin	MN	55316
Sit Down/Full Service	Independent	Maverick's Grill	11328 West River Road	Champlin	MN	55316
Sit Down/Full Service	Independent	Yummy Buffet	12325-12455 Champlin Dr	Champlin	MN	55316
Sit Down/Full Service	National Chain	Ruby Tuesday	11469 Marketplace Dr N	Champlin	MN	55316
Sit Down/Full Service	Regional Chain	Broadway Pizza	11186 N Commerce Dr	Champlin	MN	55316
Sit Down/Full Service	Regional Chain	El Toro Mexican Restaurant	10901-10909 Douglas Dr	Champlin	MN	55316
Sit Down/Full Service	Regional Chain	Sarpino's Pizzeria	11450-11468 Jefferson Ct	Champlin	MN	55316
Take Out/No Seating	Independent	Ming Tree Chow Mein	500-520 Jefferson Hwy	Champlin	MN	55316
Take Out/No Seating	Independent	Q Fanatic BBQ	180 Miller Rd	Champlin	MN	55316
Take Out/No Seating	National Chain	Papa John's	11420-11464 N Marketplace Dr	Champlin	MN	55316
Take Out/No Seating	National Chain	Papa Murphy's	11351 N Aquila Dr	Champlin	MN	55316
Take Out/No Seating	National Chain	Pizza Hut	11450-11468 Jefferson Ct	Champlin	MN	55316
Fast/Casual	Independent	Jalsa Indian Fast Food	755-925 NE 45th Ave	Columbia Heights	MN	55421
Fast/Casual	National Chain	A&W	5060 NE Central Ave	Columbia Heights	MN	55421
Fast/Casual	National Chain	Jimmy John's	4955 NE Central Ave	Columbia Heights	MN	55421
Fast/Casual	National Chain	KFC	5060 NE Central Ave	Columbia Heights	MN	55421
Fast/Casual	National Chain	McDonald's	4605 NE Central Ave	Columbia Heights	MN	55421
Fast/Casual	National Chain	Sonic	4910 Central Ave NE	Columbia Heights	MN	55421
Fast/Casual	National Chain	Subway	4755-4757 NE Central Ave	Columbia Heights	MN	55421
Fast/Casual	National Chain	Taco Bell	4900 Central Ave NE	Columbia Heights	MN	55421
Fast/Casual	National Chain	TCBY	4755-4757 NE Central Ave	Columbia Heights	MN	55421
Fast/Casual	National Chain	Wendy's	5050 NE Central Ave	Columbia Heights	MN	55421
Fast/Casual	National Chain	White Castle	5055 NE Central Ave	Columbia Heights	MN	55421
Sit Down/Full Service	Independent	Big Marina Grill & Deli O	4755-4757 NE Central Ave	Columbia Heights	MN	55421
Sit Down/Full Service	Independent	Delhi Hut	4301-4315 NE Central Ave	Columbia Heights	MN	55421
Sit Down/Full Service	Independent	Puerto Vallarta Mexican Restaurant	3800 NE Central Ave	Columbia Heights	MN	55421
Sit Down/Full Service	Independent	Pyramids Cafe Inc	4915-4945 NE Central Ave	Columbia Heights	MN	55421
Sit Down/Full Service	Independent	Yafa Grill & Pizzeria	4110 NE Central Ave	Columbia Heights	MN	55421
Sit Down/Full Service	National Chain	Chevy Grille	3701 NE Central Ave	Columbia Heights	MN	55421
Sit Down/Full Service	National Chain	LaCasita Mexican Restaurant	5085 NE Central Ave	Columbia Heights	MN	55421
Take Out/No Seating	National Chain	Little Caesars	4864 NE Central Ave	Columbia Heights	MN	55421
Take Out/No Seating	National Chain	Papa John's	5098 NE Central Ave	Columbia Heights	MN	55421
Take Out/No Seating	National Chain	Pizza Hut	3854 NE Central Ave	Columbia Heights	MN	55421
Take Out/No Seating	National Chain	WingStreet	3854 NE Central Ave	Columbia Heights	MN	55421
Fast/Casual	National Chain	Arby's	2820 Coon Rapids Blvd NW	Coon Rapids	MN	55433
Fast/Casual	National Chain	Arby's	3385 124th Ave NW	Coon Rapids	MN	55433
Fast/Casual	National Chain	Buffalo Wild Wings	3395 NW River Rapids Dr	Coon Rapids	MN	55448
Fast/Casual	National Chain	Burger King	8501 NW Springbrook Dr	Coon Rapids	MN	55433
Fast/Casual	National Chain	Burger King	2025 NW Northdale Blvd	Coon Rapids	MN	55433
Fast/Casual	National Chain	Caribou Coffee	2022-2050 Northdale Blvd	Coon Rapids	MN	55433
Fast/Casual	National Chain	Caribou Coffee	8601 Springbrook Dr NW	Coon Rapids	MN	55433
Fast/Casual	National Chain	Caribou Coffee	3536-3540 Main St NW	Coon Rapids	MN	55448
Fast/Casual	National Chain	Culver's	611 Coon Rapids Blvd NW	Coon Rapids	MN	55433
Fast/Casual	National Chain	Dairy Queen	3064 Coon Rapids Blvd NW	Coon Rapids	MN	55433
Fast/Casual	National Chain	Dairy Queen	12792 Riverdale Blvd NW	Coon Rapids	MN	55448
Fast/Casual	National Chain	Famous Dave's	3211 Northale Blvd NW	Coon Rapids	MN	55448
Fast/Casual	National Chain	Jimmy John's	12665-12709 Riverdale Blvd NW	Coon Rapids	MN	55448
Fast/Casual	National Chain	KFC	3220 124th Ave NW	Coon Rapids	MN	55433
Fast/Casual	National Chain	KFC	8770 University Ave NW	Coon Rapids	MN	55448
Fast/Casual	National Chain	Long John Silver's	12759 Riverdale Blvd NW	Coon Rapids	MN	55448
Fast/Casual	National Chain	McDonald's	3080 Coon Rapids Blvd NW	Coon Rapids	MN	55433
Fast/Casual	National Chain	McDonald's	3231 NW Northdale Blvd	Coon Rapids	MN	55448
Fast/Casual	National Chain	Noodles & Company	3455-3479 NW Riverdale	Coon Rapids	MN	55448
Fast/Casual	National Chain	Panera Bread	8601 Springbrook Dr NW	Coon Rapids	MN	55433
Fast/Casual	National Chain	Potbelly Sandwich Works	12485 NW Riverdale Blvd	Coon Rapids	MN	55433
Fast/Casual	National Chain	Starbucks	77-141 85th Ave NW	Coon Rapids	MN	55433
Fast/Casual	National Chain	Subway	2022-2050 Northdale Blvd	Coon Rapids	MN	55433
Fast/Casual	National Chain	Subway	11650 Round Lake Blvd	Coon Rapids	MN	55433
Fast/Casual	National Chain	White Castle	3465 124th Ave NW	Coon Rapids	MN	55433
Fast/Casual	Regional Chain	Dino's Gyros	3179-3187 NW Northdale Blvd	Coon Rapids	MN	55433
Sit Down/Full Service	Independent	BK Family Restaurant	11436-11476 Martin St NW	Coon Rapids	MN	55433
Sit Down/Full Service	Independent	El Loro Mexica Restaurant	11590 NW Robinson Dr	Coon Rapids	MN	55433
Sit Down/Full Service	Independent	Ils Wayport	3231 NW Northdale Blvd	Coon Rapids	MN	55448
Sit Down/Full Service	Independent	Mandarin Buffet	3390 124th Ave NW	Coon Rapids	MN	55433
Sit Down/Full Service	Independent	New Mandarin	2711 Coon Rapids Blvd NW	Coon Rapids	MN	55433
Sit Down/Full Service	Independent	Well Sports Tavern	35 NW Coon Rapids Blvd	Coon Rapids	MN	55448

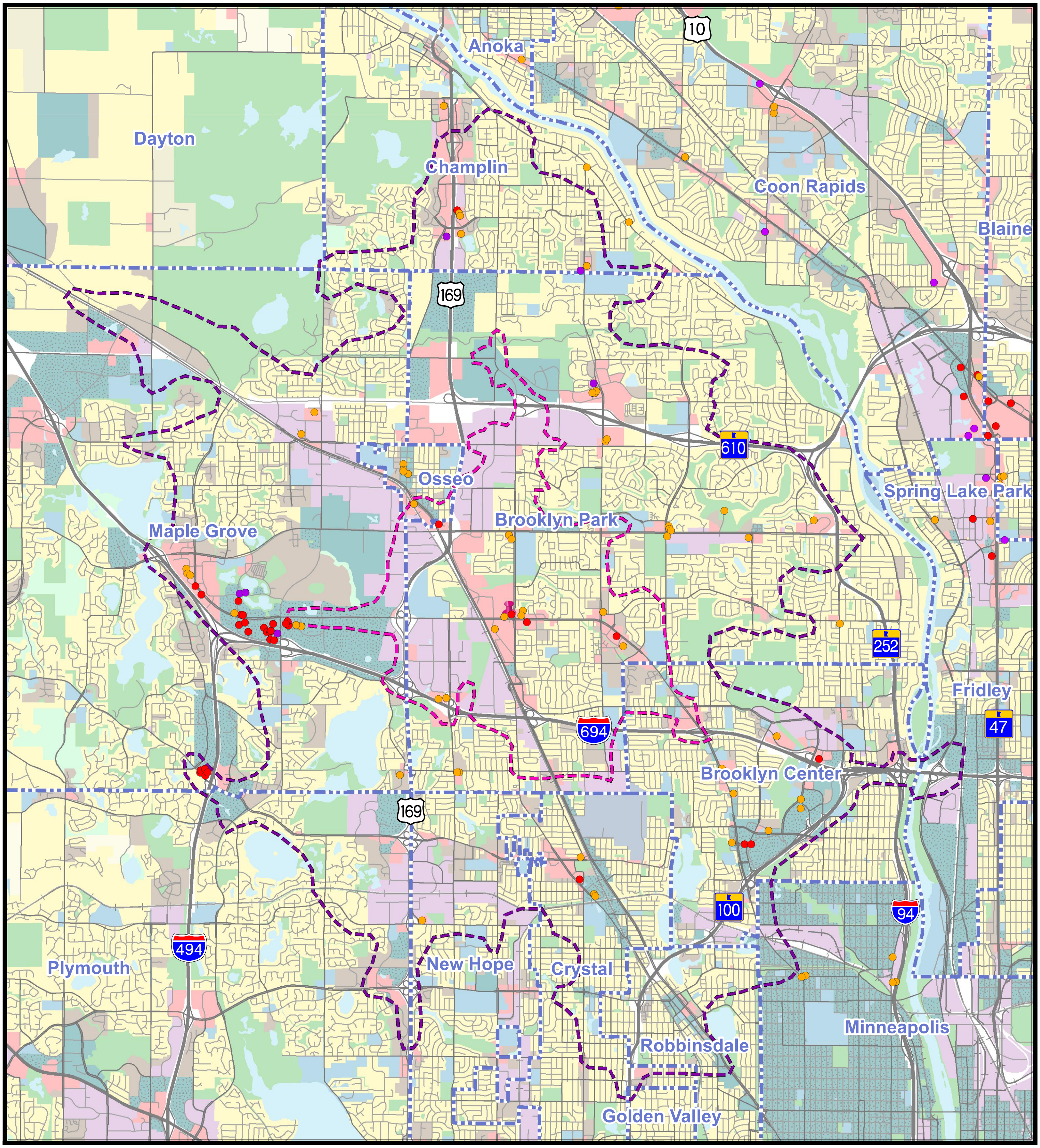
Type	Ownership	Name	Address	City	State	Zip
Sit Down/Full Service	National Chain	Bennigan's	3590 NW River Rapids Dr	Coon Rapids	MN	55448
Sit Down/Full Service	National Chain	Boston's The Gourmet Pizza	12794 Riverdale Blvd NW	Coon Rapids	MN	55448
Sit Down/Full Service	National Chain	Denny's Restaurant	8850 NE University Ave	Coon Rapids	MN	55448
Sit Down/Full Service	National Chain	IHOP	12792 Riverdale Blvd NW	Coon Rapids	MN	55448
Sit Down/Full Service	National Chain	IHOP	55 NE Coon Rapids Blvd	Coon Rapids	MN	55448
Sit Down/Full Service	National Chain	Old Country Buffet	3580 Main St NW	Coon Rapids	MN	55448
Sit Down/Full Service	National Chain	Olive Garden	150 Coon Rapids Blvd NW	Coon Rapids	MN	55433
Sit Down/Full Service	National Chain	Outback SteakHouse	8880 NW Springbrook Dr	Coon Rapids	MN	55433
Sit Down/Full Service	National Chain	Red Lobster	8500 NE University Ave	Coon Rapids	MN	55433
Sit Down/Full Service	National Chain	T.G.I. Friday's	12519 Riverdale Blvd NW	Coon Rapids	MN	55448
Sit Down/Full Service	Regional Chain	Carbone's Pizzeria	133 85th Ave NW	Coon Rapids	MN	55433
Sit Down/Full Service	Regional Chain	Green Mill Restaurant & Bar	12475 NW Riverdale Blvd	Coon Rapids	MN	55433
Sit Down/Full Service	Regional Chain	Khan's Mongolian Barbeque	2085 NW Northdale Blvd	Coon Rapids	MN	55433
Sit Down/Full Service	Regional Chain	Pizza Flame	2016 105th Ave NW	Coon Rapids	MN	55433
Sit Down/Full Service	Regional Chain	Sammy's Pizza and Restaurant	54-56 99th Ave NW	Coon Rapids	MN	55448
Take Out/No Seating	National Chain	Little Caesars	3300-3550 124th Ave NW	Coon Rapids	MN	55433
Take Out/No Seating	National Chain	Papa Murphy's	3536-3540 Main St NW	Coon Rapids	MN	55448
Take Out/No Seating	National Chain	Papa Murphy's	3564 Main St NW	Coon Rapids	MN	55448
Take Out/No Seating	National Chain	Pizza Hut	2453 Coon Rapids Blvd NW	Coon Rapids	MN	55433
Take Out/No Seating	National Chain	Seattle Sutton's Healthy Eating	3005-3067 Coon Rapids Blvd NW	Coon Rapids	MN	55433
Take Out/No Seating	National Chain	WingStreet	2453 Coon Rapids Blvd NW	Coon Rapids	MN	55433
Fast/Casual	Independent	Jin's Chow Mein	99-145 Willow Bnd	Crystal	MN	55428
Fast/Casual	National Chain	Arby's	5629 W Broadway Ave	Crystal	MN	55428
Fast/Casual	National Chain	Buffalo Wild Wings	5502-5590 W Broadway	Crystal	MN	55428
Fast/Casual	National Chain	Burger King	5358 W Broadway Ave	Crystal	MN	55428
Fast/Casual	National Chain	Caribou Coffee	301-355 Willow Bnd	Crystal	MN	55428
Fast/Casual	National Chain	Chipotle	5600-5628 W Broadway Ave	Crystal	MN	55428
Fast/Casual	National Chain	Dairy Queen	6827 Bass Lake Rd	Crystal	MN	55428
Fast/Casual	National Chain	KFC	6817 Bass Lake Rd	Crystal	MN	55428
Fast/Casual	National Chain	McDonald's	5400 W Broadway	Crystal	MN	55428
Fast/Casual	National Chain	McDonald's	7685 Broadway Ave N	Crystal	MN	55428
Fast/Casual	National Chain	Subway	5557 W Broadway Ave	Crystal	MN	55428
Fast/Casual	National Chain	Taco Bell	7100 Bass Lake Rd	Crystal	MN	55428
Fast/Casual	National Chain	Wendy's	5440 W Broadway Ave	Crystal	MN	55428
Sit Down/Full Service	Independent	Big Lou Bar Grill	5216 W Broadway Ave	Crystal	MN	55429
Sit Down/Full Service	Independent	Crystal Bistro	6316-6408 Bass Lake Rd N	Crystal	MN	55428
Sit Down/Full Service	Independent	Eggies Restaurant	6316-6408 Bass Lake Rd N	Crystal	MN	55428
Sit Down/Full Service	Independent	Fieldhouse Tavern	5600-5628 W Broadway Ave	Crystal	MN	55428
Sit Down/Full Service	National Chain	Old Country Buffet	5502-5590 W Broadway	Crystal	MN	55428
Sit Down/Full Service	National Chain	Perkins	5420 W Broadway Ave	Crystal	MN	55428
Take Out/No Seating	National Chain	Little Caesars	99-145 Willow Bnd	Crystal	MN	55428
Take Out/No Seating	National Chain	Papa Murphy's	5600-5628 W Broadway Ave	Crystal	MN	55428
Fast/Casual	National Chain	Burger King	289 NE 57th Ave	Fridley	MN	55432
Fast/Casual	National Chain	Dairy Queen	225 Osborne Rd NE	Fridley	MN	55432
Fast/Casual	National Chain	McDonald's	244-250 57th Ave NE	Fridley	MN	55432
Fast/Casual	National Chain	McDonald's	8100 NE University Ave	Fridley	MN	55432
Fast/Casual	National Chain	McDonald's	8124 NE Highway 65	Fridley	MN	55432
Fast/Casual	National Chain	Quiznos Subs	7610 NE University Ave	Fridley	MN	55432
Fast/Casual	National Chain	Starbucks	755 NE 53rd Ave	Fridley	MN	55421
Fast/Casual	National Chain	Taco Bell	7295 University Ave NE	Fridley	MN	55432
Fast/Casual	National Chain	Wendy's	7601 NE Highway 65	Fridley	MN	55432
Fast/Casual	Regional Chain	Dunn Bros Coffee	7610 NE University Ave	Fridley	MN	55432
Sit Down/Full Service	Independent	Hong Kong Kitchen	6522-6594 University Ave NE	Fridley	MN	55432
Sit Down/Full Service	Independent	Main Event Restaurant & Bar	7820-7880 NE University Ave	Fridley	MN	55432
Sit Down/Full Service	Independent	Rinconcito Latino Restaurant L	7883-7899 E River Rd	Fridley	MN	55432
Sit Down/Full Service	National Chain	Old Country Buffet	6522-6594 University Ave NE	Fridley	MN	55432
Sit Down/Full Service	National Chain	Perkins	7520 NE University Ave	Fridley	MN	55432
Sit Down/Full Service	Regional Chain	Embers Family Restaurant	5400 NE Central Ave	Fridley	MN	55421
Sit Down/Full Service	Regional Chain	Pizza Flame	315-323 Osborne Rd NE	Fridley	MN	55432
Take Out/No Seating	National Chain	Little Caesars	6522-6594 University Ave NE	Fridley	MN	55432
Take Out/No Seating	National Chain	Papa Murphy's	201-205 NE 57th Ave	Fridley	MN	55432
Take Out/No Seating	National Chain	Pizza Hut	8156 NE Highway 65	Fridley	MN	55432
Fast/Casual	National Chain	Arby's	7885 Wedgewood Ln N	Maple Grove	MN	55369
Fast/Casual	National Chain	Burger King	13840 Grove Dr	Maple Grove	MN	55311
Fast/Casual	National Chain	Caribou Coffee	8071-8085 Wedgewood Ln N	Maple Grove	MN	55369
Fast/Casual	National Chain	Caribou Coffee	12880 Elm Creek Blvd	Maple Grove	MN	55369
Fast/Casual	National Chain	Caribou Coffee	12700-12872 Bass Lake Rd	Maple Grove	MN	55369
Fast/Casual	National Chain	Caribou Coffee	11611-11627 Fountains Dr	Maple Grove	MN	55369
Fast/Casual	National Chain	Caribou Coffee	11160-12000 Fountains Dr N	Maple Grove	MN	55369
Fast/Casual	National Chain	Caribou Coffee	8801-8881 N Jefferson Hwy	Maple Grove	MN	55369
Fast/Casual	National Chain	Chipotle	7740-7750 N Main St	Maple Grove	MN	55369
Fast/Casual	National Chain	Cold Stone Creamery	7745 N Main St	Maple Grove	MN	55369
Fast/Casual	National Chain	Dairy Queen	13700-13768 N 83rd Ave	Maple Grove	MN	55369
Fast/Casual	National Chain	Erbert & Gerbert's Subs & Clubs	7740-7750 N Main St	Maple Grove	MN	55369
Fast/Casual	National Chain	Famous Dave's	7825 Vinewood Ln	Maple Grove	MN	55369
Fast/Casual	National Chain	Five Guys	12750-12810 Elm Creek Blvd	Maple Grove	MN	55369
Fast/Casual	National Chain	Fuddrucker's Restaurant	14500 Weaver Lake Rd	Maple Grove	MN	55311
Fast/Casual	National Chain	Jimmy John's	8801-8881 N Jefferson Hwy	Maple Grove	MN	55369

Type	Ownership	Name	Address	City	State	Zip
Fast/Casual	National Chain	Long John Silver's	13910 Grove Dr	Maple Grove	MN	55311
Fast/Casual	National Chain	McDonald's	6255 N Sycamore Ln	Maple Grove	MN	55369
Fast/Casual	National Chain	McDonald's	13595 N 83rd Way	Maple Grove	MN	55369
Fast/Casual	National Chain	Noodles & Company	7830 Main St N	Maple Grove	MN	55369
Fast/Casual	National Chain	Potbelly Sandwich Works	12409-12499 Elm Creek Blvd	Maple Grove	MN	55369
Fast/Casual	National Chain	Qdoba Mexican Grill	12107-12181 Elm Creek Blvd	Maple Grove	MN	55369
Fast/Casual	National Chain	Starbucks	7961-7979 Wedgewood Ln N	Maple Grove	MN	55369
Fast/Casual	National Chain	Subway	12700-12872 Bass Lake Rd	Maple Grove	MN	55369
Fast/Casual	National Chain	Subway	9660-9712 63rd Ave N	Maple Grove	MN	55369
Fast/Casual	National Chain	Subway	11611-11627 Fountains Dr	Maple Grove	MN	55369
Fast/Casual	National Chain	Subway	13700-13768 N 83rd Ave	Maple Grove	MN	55369
Fast/Casual	National Chain	Subway	10000-10026 County Rd 81	Maple Grove	MN	55369
Fast/Casual	National Chain	Taco Bell	13910 Grove Dr	Maple Grove	MN	55311
Fast/Casual	National Chain	Wendy's	13645 N 83rd Way	Maple Grove	MN	55369
Fast/Casual	Regional Chain	Angeno's Pizza	13572-13630 N 80th Cir	Maple Grove	MN	55369
Fast/Casual	Regional Chain	Dunn Bros Coffee	13290-13356 Bass Lake Rd	Maple Grove	MN	55311
Fast/Casual	Regional Chain	Dunn Bros Coffee	7881-7899 N Main St	Maple Grove	MN	55369
Fast/Casual	Regional Chain	Dunn Bros Coffee	7767-7817 N Main St	Maple Grove	MN	55369
Fast/Casual	Regional Chain	Leann Chin	7767-7817 N Main St	Maple Grove	MN	55369
Sit Down/Full Service	Independent	Camino Restauracion Por El Esp	11201-11435 N 96th Ave	Maple Grove	MN	55369
Sit Down/Full Service	Independent	Chin Yung Chinese Restaurant	13700-13768 N 83rd Ave	Maple Grove	MN	55369
Sit Down/Full Service	Independent	Dickey's Barbecue Pit	11631-11647 Fountains Dr	Maple Grove	MN	55369
Sit Down/Full Service	Independent	El Rodeo	13572 80th Cir N	Maple Grove	MN	55369
Sit Down/Full Service	Independent	K & L Diner	9651-9707 N 63rd Ave	Maple Grove	MN	55369
Sit Down/Full Service	Independent	Kabobs	8085 Wedgewood Lane N	Maple Grove	MN	55369
Sit Down/Full Service	Independent	Kyoto Sushi	13599-13777 Grove Dr	Maple Grove	MN	55311
Sit Down/Full Service	Independent	Lookout Supper Club Inc; The	8672 Pineview Ln	Maple Grove	MN	55369
Sit Down/Full Service	Independent	Maple Grove Mongo's Grill	11610-11628 Fountains Dr	Maple Grove	MN	55369
Sit Down/Full Service	Independent	Mt. Fuji Steakhouse & Sushi Bar	7900-7950 N Main St	Maple Grove	MN	55369
Sit Down/Full Service	Independent	Tavern In Grove	12730 Elm Creek Blvd	Maple Grove	MN	55369
Sit Down/Full Service	Independent	Thirsty's	9375 Deerwood Ln N	Maple Grove	MN	55369
Sit Down/Full Service	National Chain	Benihana	11840 Fountains Way	Maple Grove	MN	55369
Sit Down/Full Service	National Chain	Biaggi's Ristorante	12051-12071 Elm Creek Blvd	Maple Grove	MN	55369
Sit Down/Full Service	National Chain	Boston's The Gourmet Pizza	12109 Main St	Maple Grove	MN	55369
Sit Down/Full Service	National Chain	Buca di Beppo	12650 N Elm Creek Blvd	Maple Grove	MN	55369
Sit Down/Full Service	National Chain	California Pizza Kitchen, Inc.	12409-12499 Elm Creek Blvd	Maple Grove	MN	55369
Sit Down/Full Service	National Chain	Champps	13521 N 80th Cir	Maple Grove	MN	55369
Sit Down/Full Service	National Chain	Chuck E. Cheese's	12905-12985 Elm Creek Blvd N	Maple Grove	MN	55369
Sit Down/Full Service	National Chain	Claddagh Irish Pub, LLC	7876-7890 N Main St	Maple Grove	MN	55369
Sit Down/Full Service	National Chain	Dave & Buster's	11780 Fountains Way	Maple Grove	MN	55369
Sit Down/Full Service	National Chain	Don Pablo's	7887 Elm Creek Blvd N	Maple Grove	MN	55369
Sit Down/Full Service	National Chain	Frankie's Chicago Style Pizza, Pasta	13700-13768 N 83rd Ave	Maple Grove	MN	55369
Sit Down/Full Service	National Chain	Granite City Food And Brewery	11909 Main St	Maple Grove	MN	55369
Sit Down/Full Service	National Chain	IHOP	14500 Weaver Lake Rd	Maple Grove	MN	55311
Sit Down/Full Service	National Chain	Olive Garden Restaurant	12520 N Elm Creek Blvd	Maple Grove	MN	55369
Sit Down/Full Service	National Chain	Original Pancake House M	13290 Bass Lake Rd	Maple Grove	MN	55311
Sit Down/Full Service	National Chain	P. F. Chang's	12051-12071 Elm Creek Blvd	Maple Grove	MN	55369
Sit Down/Full Service	National Chain	Perkins	7300 N Hemlock Ln	Maple Grove	MN	55369
Sit Down/Full Service	National Chain	Red Lobster Restaurant	12515 Elm Creek Blvd N	Maple Grove	MN	55369
Sit Down/Full Service	National Chain	T.G.I. Friday's	11830 Fountains Way N	Maple Grove	MN	55369
Sit Down/Full Service	National Chain	Timberlodge Steakhouse	12635 N Elm Creek Blvd	Maple Grove	MN	55369
Sit Down/Full Service	Regional Chain	3 Squares	12690 Arbor Lakes Pkwy	Maple Grove	MN	55369
Sit Down/Full Service	Regional Chain	Pittsburgh Blue	11900 Main St	Maple Grove	MN	55369
Sit Down/Full Service	Regional Chain	Sawatdee Thai Restaurants	7881-7899 N Main St	Maple Grove	MN	55369
Take Out/No Seating	Independent	Yu Fong	13290 Bass Lake Rd	Maple Grove	MN	55311
Take Out/No Seating	National Chain	Dippin' Dots	13644 80th Cir N	Maple Grove	MN	55369
Take Out/No Seating	National Chain	Papa John's	7961-7979 Wedgewood Ln N	Maple Grove	MN	55369
Take Out/No Seating	National Chain	Pizza Hut	13290 Bass Lake Rd	Maple Grove	MN	55311
Take Out/No Seating	National Chain	Seattle Sutton's Healthy Eating	6812-6850 N Hemlock Ln	Maple Grove	MN	55369
Take Out/No Seating	National Chain	WingStreet	13290 Bass Lake Rd	Maple Grove	MN	55311
Fast/Casual	National Chain	McDonald's	4435 N Lyndale Ave	Minneapolis	MN	55412
Sit Down/Full Service	Independent	Emily S F & M Cafe	2124 44th Ave	Minneapolis	MN	55412
Sit Down/Full Service	Independent	Rix Bar & Grill	2201-2203 N 44th Ave	Minneapolis	MN	55412
Sit Down/Full Service	Independent	Top Diner	4324-4330 N Lyndale Ave	Minneapolis	MN	55412
Sit Down/Full Service	Independent	Waldo's Kitchen	4601 N Lyndale Ave	Minneapolis	MN	55412
Take Out/No Seating	National Chain	Domino's Pizza	2147 N 44th Ave	Minneapolis	MN	55412
Fast/Casual	Independent	Mountain Mudd Espresso	7530 42nd Ave N	New Hope	MN	55427
Fast/Casual	National Chain	Caribou Coffee	4210-4216 N Winnetka Ave	New Hope	MN	55428
Fast/Casual	National Chain	Panda Express	4301-4465 N Winnetka Ave	New Hope	MN	55428
Fast/Casual	National Chain	Philly Dawgz	4301-4465 N Winnetka Ave	New Hope	MN	55428
Fast/Casual	National Chain	Subway	4203-4239 N Winnetka Ave	New Hope	MN	55428
Fast/Casual	National Chain	Taco John's	4203-4239 N Winnetka Ave	New Hope	MN	55428
Fast/Casual	National Chain	TCBY	4203-4239 N Winnetka Ave	New Hope	MN	55428
Sit Down/Full Service	Independent	B. Grizzly's Pizza	4203-4239 N Winnetka Ave	New Hope	MN	55428
Sit Down/Full Service	Independent	Hong Kong Buffet	4203-4239 N Winnetka Ave	New Hope	MN	55428
Sit Down/Full Service	Independent	Jets Pizza	4210-4216 N Winnetka Ave	New Hope	MN	55428
Sit Down/Full Service	Independent	O'bresky Restaurants	4900 Hwy 169 N	New Hope	MN	55428

Type	Ownership	Name	Address	City	State	Zip
Sit Down/Full Service	National Chain	Applebee's	4203-4239 N Winnetka Ave	New Hope	MN	55428
Take Out/No Seating	National Chain	Domino's Pizza	7801-7841 N 62nd Ave	New Hope	MN	55428
Take Out/No Seating	National Chain	Pizza Hut	7500 Bass Lake Rd	New Hope	MN	55428
Take Out/No Seating	National Chain	WingStreet	7500 Bass Lake Rd	New Hope	MN	55428
Fast/Casual	Independent	Java Jungle	317-319 Central Ave	Osseo	MN	55369
Sit Down/Full Service	Independent	Duffy's	337 Central Ave	Osseo	MN	55369
Sit Down/Full Service	Independent	Kopper Kettle Restaurant	227-231 Central Ave	Osseo	MN	55369
Sit Down/Full Service	Independent	Lynde's Inn Restaurant	201 County Rd 81	Osseo	MN	55369
Sit Down/Full Service	Independent	Nectar Wine Bar	204 Central Ave	Osseo	MN	55369
Sit Down/Full Service	Independent	Olympia Café	247 Central Ave	Osseo	MN	55369
Sit Down/Full Service	Independent	Reuan Thai	311 Central Ave	Osseo	MN	55369
Fast/Casual	National Chain	Burger King	10000 Rockford Rd	Plymouth	MN	55442
Fast/Casual	National Chain	Caribou Coffee	4345 Nathan Ln N	Plymouth	MN	55442
Fast/Casual	National Chain	Culver's	6175 N Quinwood Ln	Plymouth	MN	55442
Fast/Casual	National Chain	Qdoba Mexican Grill	4345 Nathan Ln N	Plymouth	MN	55442
Fast/Casual	National Chain	Quiznos Sub	4400-4410 Nathan Ln N	Plymouth	MN	55442
Fast/Casual	National Chain	Subway	4345 Nathan Ln N	Plymouth	MN	55442
Sit Down/Full Service	Independent	#1 Chinese & Japanese Cuisine	4345 Nathan Ln N	Plymouth	MN	55442
Sit Down/Full Service	Independent	CiCi's Pizza	4345 Nathan Ln N	Plymouth	MN	55442
Take Out/No Seating	National Chain	Papa Murphy's	4345 Nathan Ln N	Plymouth	MN	55442
Fast/Casual	National Chain	Burger King	8097 NE Highway 65	Spring Lake Park	MN	55432
Fast/Casual	National Chain	Caribou Coffee	8097 NE Highway 65	Spring Lake Park	MN	55432
Fast/Casual	National Chain	McDonald's	8124 Highway 65 NE	Spring Lake Park	MN	55432
Sit Down/Full Service	Independent	Biff's Billiards Sports Bar & Grill; Inc	7777 Highway 65 NE	Spring Lake Park	MN	55432
Sit Down/Full Service	Independent	Habachi Grill & The Supreme Buffet	8151-8255 NE University Ave	Spring Lake Park	MN	55432
Sit Down/Full Service	Independent	Montes Sports Bar	8299 NE University Ave	Spring Lake Park	MN	55432
Sit Down/Full Service	Independent	Vietnam Taste Restaurant	8151-8255 NE University Ave	Spring Lake Park	MN	55432
Sit Down/Full Service	Regional Chain	Broadway Pizza	8298 NE University Ave	Spring Lake Park	MN	55432
Sit Down/Full Service	Regional Chain	Keys Cafe & Bakery	8299 NE University Ave	Spring Lake Park	MN	55432

Appendix B: Trade Area Drive Time Maps

See following pages



Drive Times around West Broadway and Brooklyn Boulevard Intersection

N
W E
S

0 0.5 1 1.5
Miles

- National Chain Restaurant
- Regional Chain Restaurant
- Independent Restaurant
- Commercial Node
- 5-Minute Driving Limit
- 10-Minute Driving Limit
- City Limits
- Agricultural
- Rural or Large-Lot Residential
- Single Family Residential
- Multifamily Residential
- Commercial
- Industrial
- Institutional
- Mixed Use
- Multi-Optional Development
- Park and Recreation
- Open Space or Restrictive Use
- Airport
- Vacant or Unknown
- Open Water

February 21, 2012

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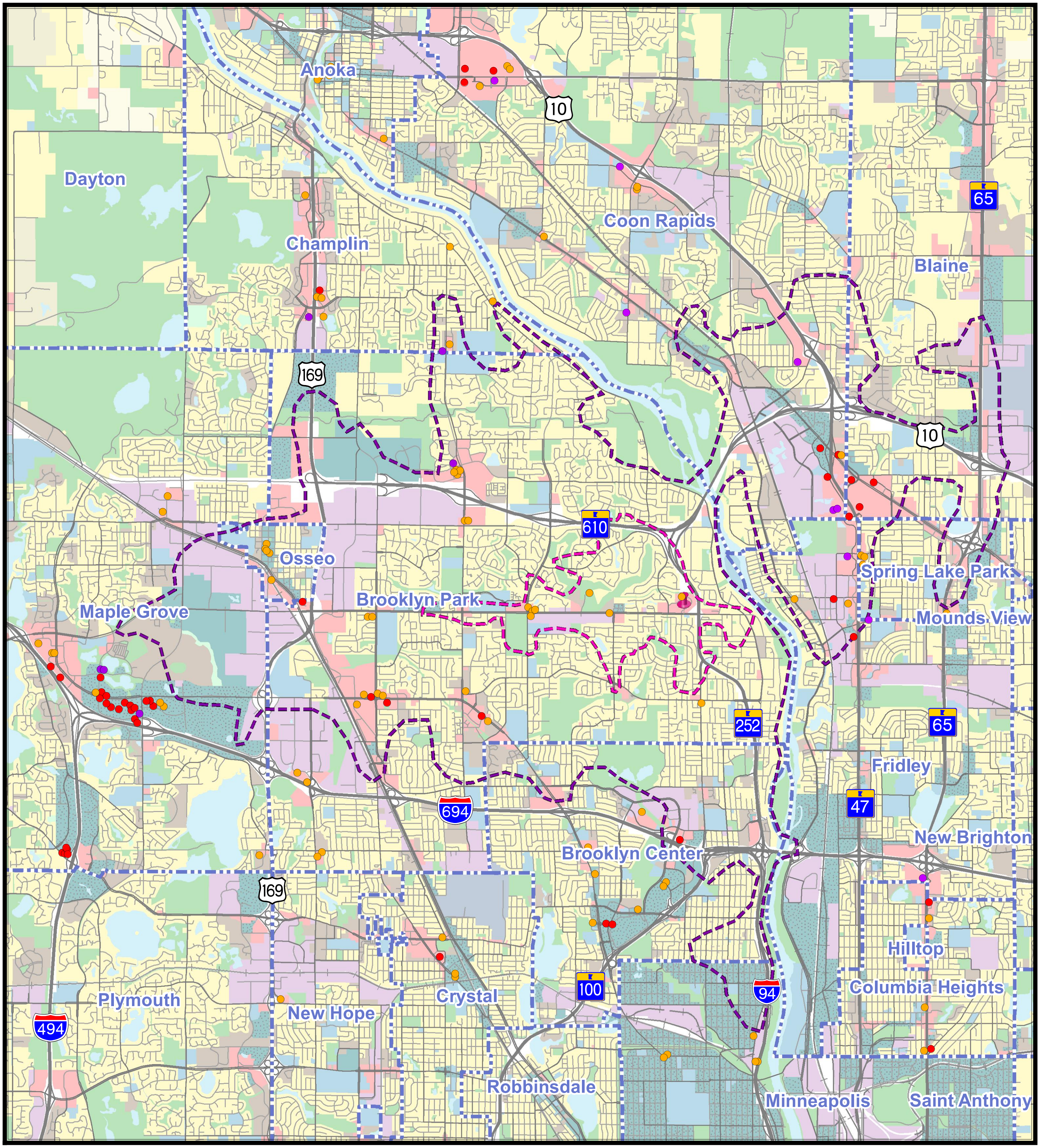

Drive Times around Highway 252 and 85th Avenue Intersection

- National Chain Restaurant
- Regional Chain Restaurant
- Independent Restaurant
- Commercial Node
- 5-Minute Driving Limit
- 10-Minute Driving Limit
- City Limits
- Agricultural
- Rural or Large-Lot Residential
- Single Family Residential
- Multifamily Residential
- Commercial
- Industrial
- Institutional
- Mixed Use
- Multi-Optional Development
- Park and Recreation
- Open Space or Restrictive Use
- Airport
- Vacant or Unknown
- Open Water

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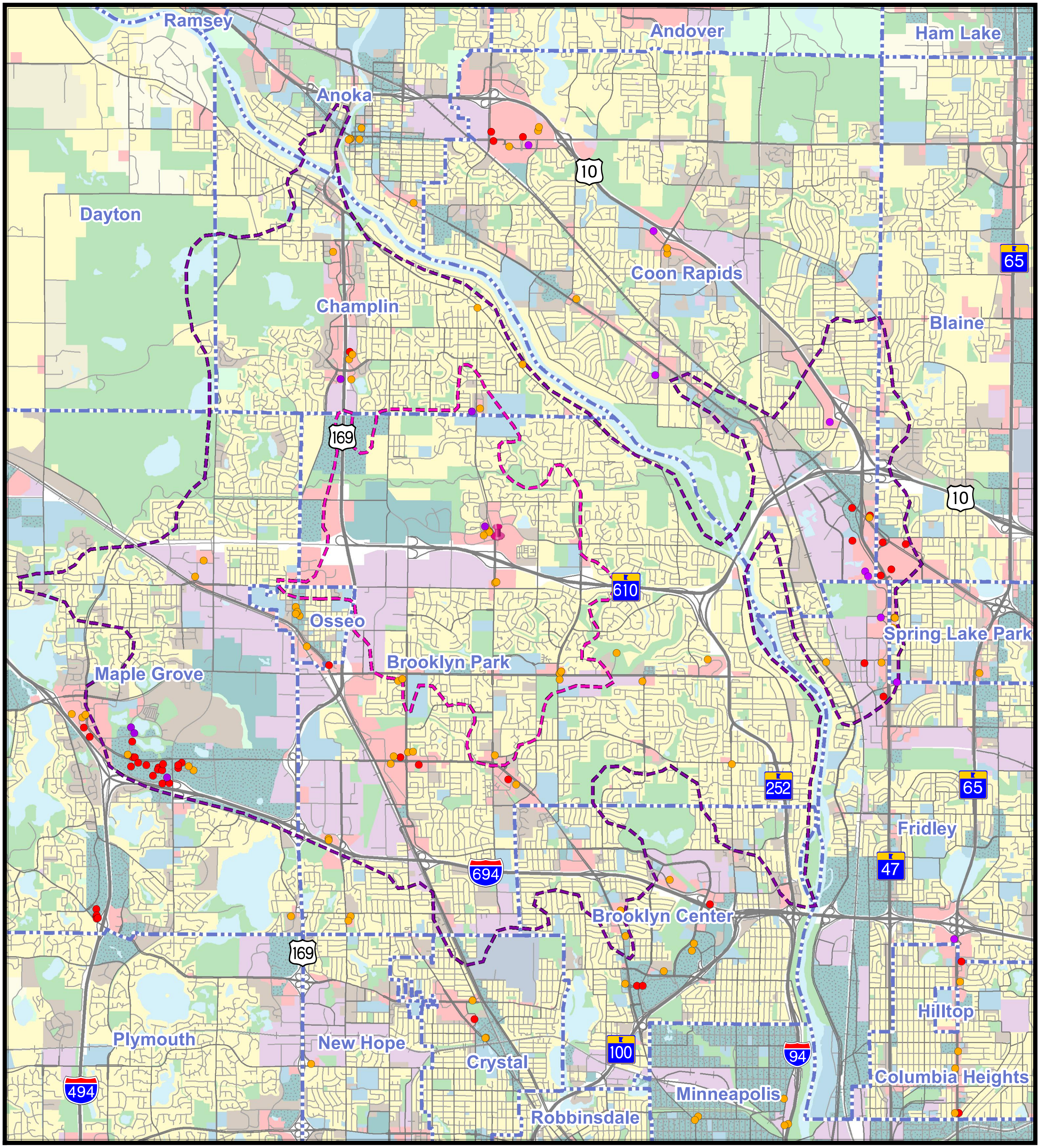

Drive Times around Highway 610 and Zane Avenue Interchange

- National Chain Restaurant
- Regional Chain Restaurant
- Independent Restaurant
- Commercial Node
- 5-Minute Driving Limit
- 10-Minute Driving Limit
- City Limits

- Agricultural
- Rural or Large-Lot Residential
- Single Family Residential
- Multifamily Residential
- Commercial
- Industrial
- Institutional

- Mixed Use
- Multi-Optional Development
- Park and Recreation
- Open Space or Restrictive Use
- Airport
- Vacant or Unknown
- Open Water

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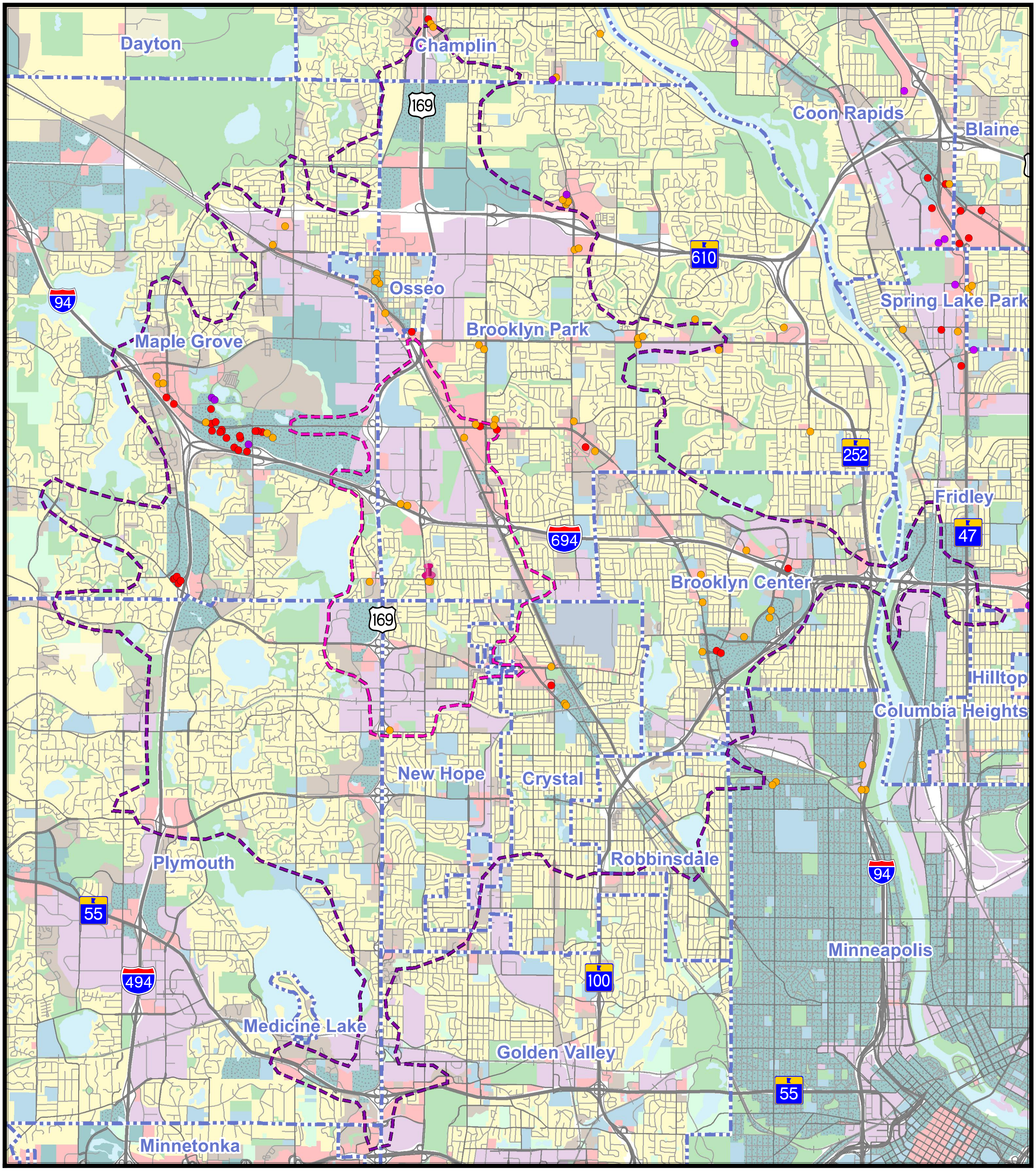

Drive Times around 63rd Avenue and Boone Avenue Intersection

N
W E
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0 0.5 1 1.5
Miles

- National Chain Restaurant
- Regional Chain Restaurant
- Independent Restaurant
- Commercial Node
- 5-Minute Driving Limit
- 10-Minute Driving Limit
- City Limits
- Agricultural
- Rural or Large-Lot Residential
- Single Family Residential
- Multifamily Residential
- Commercial
- Industrial
- Institutional
- Mixed Use
- Multi-Optional Development
- Park and Recreation
- Open Space or Restrictive Use
- Airport
- Vacant or Unknown
- Open Water

February 21, 2012

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Appendix C: Detailed Demand Calculations

Table A1: 2010 Sit-Down Restaurant Demand Calculation

CALCULATION OF TRADE AREA SUPPLY (i.e., sales capacity)		Broadway & Brooklyn Blvd Trade Area	85th Ave & Hwy 252 Trade Area	Hwy 610 & Zane Ave Trade Area	63rd & Boone Ave Trade Area
Sit-Down Restaurant Space in Trade Area (sq ft)[1]		49,500	24,000	28,700	12,000
Sit-Down Restaurant Space near Trade Area (sq ft)[1, 2]	+	23,420	12,700	13,460	900
Trade Area Sit-Down Restaurant Capacity (sq ft)	=	72,920	36,700	42,160	12,900
Average Sales per Sq Ft at Sit-Down Restaurants[3]	x	$275	$275	$275	$275
Trade Area Sit-Down Restaurant Sales Capacity	=	$20,053,000	$10,092,500	$11,594,000	$3,547,500
CALCULATION OF TRADE AREA DEMAND (i.e., purchasing power)					
Demand from Households					
2010 Aggregate Household Income[4]		$459,978,200	$596,616,200	$666,738,400	$233,098,700
Household Expenditures as a Percent of Income[5]	x	105%	85%	77%	94%
Average Annual Expenditures	=	$483,248,605	$504,617,045	$514,595,750	$218,543,090
% Spent on Food Away From Home[5]	x	4.9%	5.3%	5.3%	5.1%
Total Expenditures on Food Away From Home	=	$23,804,805	$26,744,703	$27,273,575	$11,145,071
% Spent at Sit-Down Restaurants[6]	x	47.4%	54.6%	60.1%	49.1%
Total Expenditures at Sit-Down Restaurants	=	$11,272,912	$14,602,767	$16,396,214	$5,473,884
% Spent Outside of the Trade Area[7]	x	28%	35%	35%	31%
Total Expenditures from Trade Area Households	=	$8,125,528	$9,491,799	$10,657,539	$3,751,319
Demand from Workers					
2010 Number of Workers[8]		12,857	3,035	7,193	1057
Average Annual Wages per Worker	x	$38,823	$35,294	$37,131	$41,280
Total Annual Wages	=	$499,144,770	$107,117,436	$267,081,857	$43,632,960
% Spent on Food Away From Home[5]	x	5.3%	5.2%	5.2%	5.3%
Total Expenditures on Food Away From Home	=	$26,230,105	$5,606,331	$13,998,565	$2,296,692
% Spent at Full Service Restaurants[6]	x	43.9%	42.5%	43.5%	44.9%
Total Expenditures at Sit-Down Restaurants	=	$11,520,486	$2,383,987	$6,082,431	$1,031,439
% Spent at or near the Workplace	x	25%	25%	25%	25%
Total Expenditures from Trade Area Workers	=	$2,880,122	$595,997	$1,520,608	$257,860
Trade Area Sit-Down Restaurant Purchasing Power		$11,005,650	$10,087,796	$12,178,147	$4,009,178
Trade Area Sit-Down Restaurant Sales Capacity	-	$20,053,000	$10,092,500	$11,594,000	$3,547,500
Supply / Demand Balance	**=**	**-$9,047,350**	**-$4,704**	**$584,147**	**$461,678**

[1] Trade Area restaurant space is based on average restaurant size by ownership type according to the Urban Land Institute (*Dollars and Cents of Shopping Centers*), which are as follows: national chain = 6,500 sf; regional chain = 4,200 sf; independent = 3,000 sf.

[2] Sit-down restaurant space located just outside the trade area but which clearly exhibits an influence on trade area residents and workers. In many cases only a portion of the square footage is accounted for because the trade areas of such restaurants only partially overlap the subject trade area.

[3] Urban Land Institute: *Dollars and Cents of Shopping Centers*

[4] U.S. Census: 2006-2010 American Community Survey

[5] Bureau of Labor Statistics: 2010 Consumer Expenditure Survey -- percentage shown is a blended average of the Census tracts that make up the trade area

[6] French et al., International Journal of Behavioral Nutrition and Physical Activity 2010, 7:77 http://www.ijbnpa.org/content/7/1/77 -- percentage shown is a blended average of Census tract that make up the trade area

[7] Spending outside an immediate trade area includes travel, workplace-related dining, and other occasions. Tracts with lower incomes have lower percentages of spending outside the Trade Area. Percentage shown is a blended average of the Census tracts that make up the trade area.

[8] U.S. Census: Longitudinal Employer-Householder Dynamic (LEHD); Met Council

Table A2: 2020 Sit-Down Restaurant Demand Calculation

		Broadway & Brooklyn Blvd Trade Area	85th Ave & Hwy 252 Trade Area	Hwy 610 & Zane Ave Trade Area	63rd & Boone Ave Trade Area
CALCULATION OF TRADE AREA SUPPLY (i.e., sales capacity)					
Sit-Down Restaurant Space in Trade Area (sq ft)[1]		49,500	24,000	28,700	12,000
Sit-Down Restaurant Space near Trade Area (sq ft)[1, 2]	+	23,420	12,700	13,460	900
Trade Area Sit-Down Restaurant Capacity (sq ft)	=	72,920	36,700	42,160	12,900
Average Sales per Sq Ft at Sit-Down Restaurants[3]	x	$275	$275	$275	$275
Trade Area Sit-Down Restaurant Sales Capacity	=	$20,053,000	$10,092,500	$11,594,000	$3,547,500
CALCULATION OF TRADE AREA DEMAND (i.e., purchasing power)					
Demand from Households					
2020 Aggregate Household Income[4]		$477,917,350	$597,212,816	$1,258,135,361	$254,077,583
Household Expenditures as a Percent of Income[5]	x	105%	85%	77%	94%
Average Annual Expenditures	=	$502,095,301	$505,121,662	$971,042,180	$238,211,968
% Spent on Food Away From Home[5]	x	4.9%	5.3%	5.3%	5.1%
Total Expenditures on Food Away From Home	=	$24,733,192	$26,771,448	$51,465,236	$12,148,127
% Spent at Sit-Down Restaurants[6]	x	47.4%	54.6%	60.1%	49.1%
Total Expenditures at Sit-Down Restaurants	=	$11,712,556	$14,617,370	$30,939,656	$5,966,533
% Spent Outside of the Trade Area[7]	x	28%	35%	35%	31%
Total Expenditures from Trade Area Households	=	$8,442,424	$9,501,291	$20,110,777	$4,088,937
Demand from Workers					
2020 Number of Workers[8]		12,436	2,491	17,709	1197
Average Annual Wages per Worker	x	$38,823	$35,294	$37,131	$41,280
Total Annual Wages	=	$482,800,370	$87,917,474	$657,549,367	$49,412,160
% Spent on Food Away From Home[5]	x	5.3%	5.2%	5.2%	5.3%
Total Expenditures on Food Away From Home	=	$25,371,205	$4,601,440	$34,464,144	$2,600,889
% Spent at Full Service Restaurants[6]	x	43.9%	42.5%	43.5%	44.9%
Total Expenditures at Sit-Down Restaurants	=	$11,143,250	$1,956,676	$14,974,806	$1,168,053
% Spent at or near the Workplace	x	25%	25%	25%	25%
Total Expenditures from Trade Area Workers	=	$2,785,813	$489,169	$3,743,701	$292,013
Trade Area Sit-Down Restaurant Purchasing Power		$11,228,236	$9,990,460	$23,854,478	$4,380,951
Trade Area Sit-Down Restaurant Sales Capacity	-	$20,053,000	$10,092,500	$11,594,000	$3,547,500
Supply / Demand Balance	**=**	**-$8,824,764**	**-$102,040**	**$12,260,478**	**$833,451**

[1] Trade Area restaurant space is based on average restaurant size by ownership type according to the Urban Land Institute (*Dollars and Cents of Shopping Centers*), which are as follows: national chain = 6,500 sf; regional chain = 4,200 sf; independent = 3,000 sf.

[2] Sit-down restaurant space located just outside the trade area but which clearly exhibits an influence on trade area residents and workers. In many cases only a portion of the square footage is accounted for because the trade areas of such restaurants only partially overlap the subject trade area.

[3] Urban Land Institute: *Dollars and Cents of Shopping Centers*

[4] To derive 2020 aggregate income, 2010 incomes figures were increased by the same rate as projected household growth between 2010 and 2020.

[5] Bureau of Labor Statistics: 2010 Consumer Expenditure Survey -- percentage shown is a blended average of the Census tracts that make up the trade area

[6] French et al., International Journal of Behavioral Nutrition and Physical Activity 2010, 7:77 http://www.ijbnpa.org/content/7/1/77 -- percentage shown is a blended average of Census tract that make up the trade area

[7] Spending outside an immediate trade area includes travel, workplace-related dining, and other occasions. Tracts with lower incomes have lower percentages of spending outside the Trade Area. Percentage shown is a blended average of the Census tracts that make up the trade area.

[8] Met Council