



# Retail Food Gaps and Opportunities in Cuyahoga County

December 8, 2011



# Introduction

## Why be concerned about neighborhood food stores?

- As people have moved out of the inner city and inner suburbs, grocery stores have also left.
- Low-income neighborhoods have high rates of diet-related diseases.
- Low-income neighborhoods have higher % of households without a vehicle.
- Low-income neighborhoods have the fewest options for obtaining fresh healthy food.



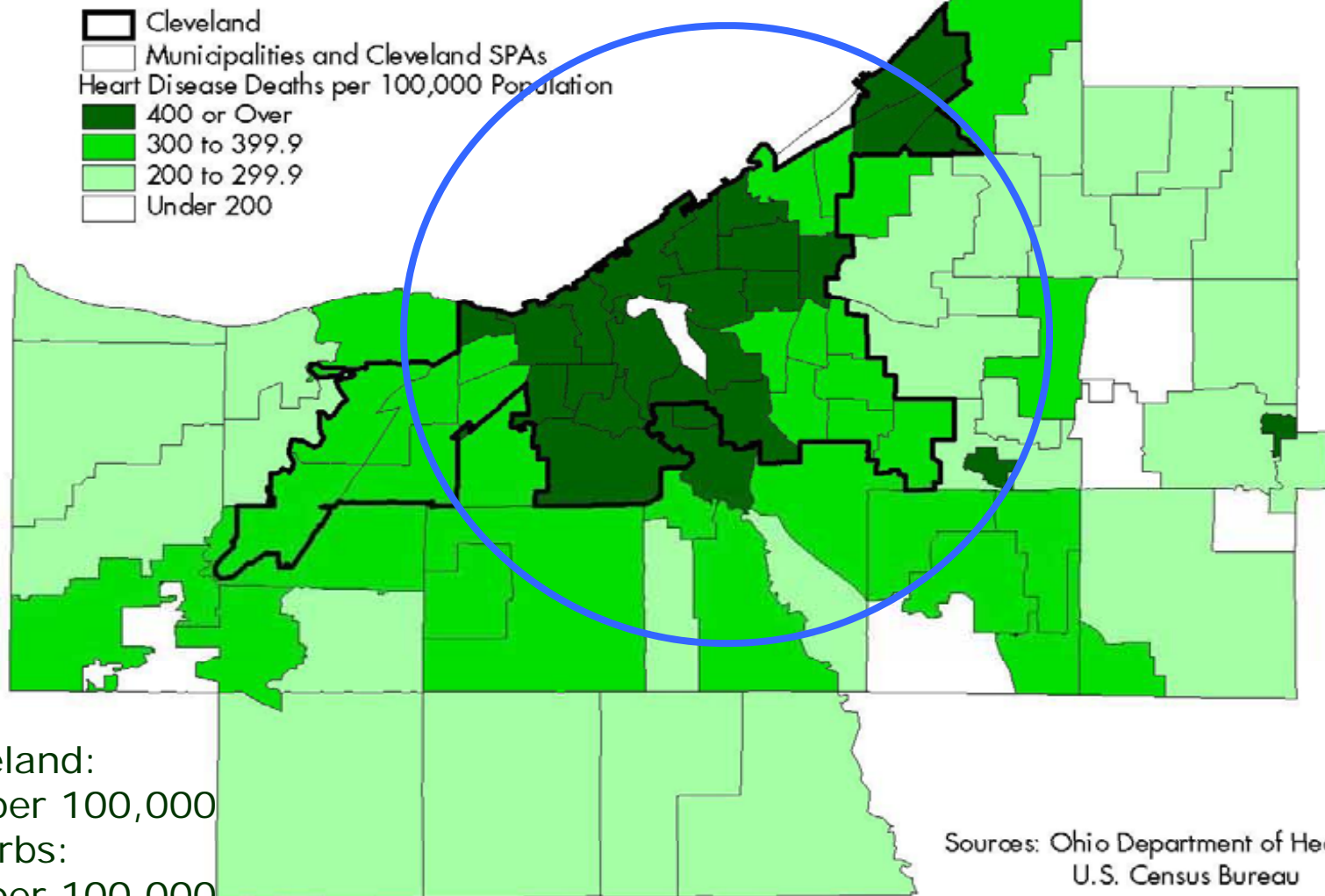
# Health Concerns

Lack of nutritious, affordable, fresh food can lead to higher rates of diet-related diseases, including heart disease, diabetes, and obesity

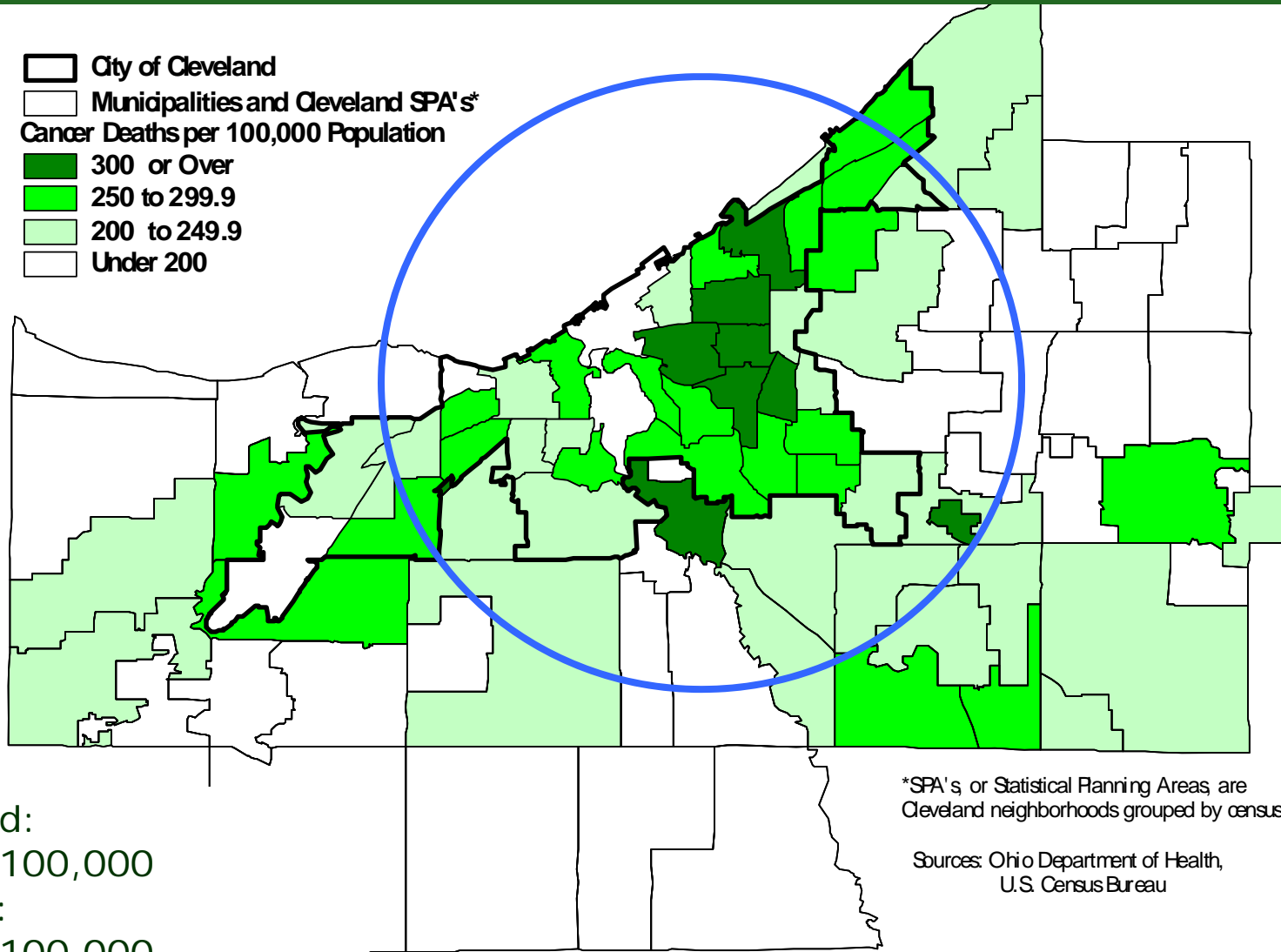


# Heart Disease is leading cause of death in the U.S.

## Average Annual Death Rate (Age-Adjusted) from Heart Disease Cuyahoga County, 1997 and 1999 to 2001



# Cancer death rates higher among blacks... Second leading cause of death in the U.S.



# Cuyahoga County: Life Expectancy

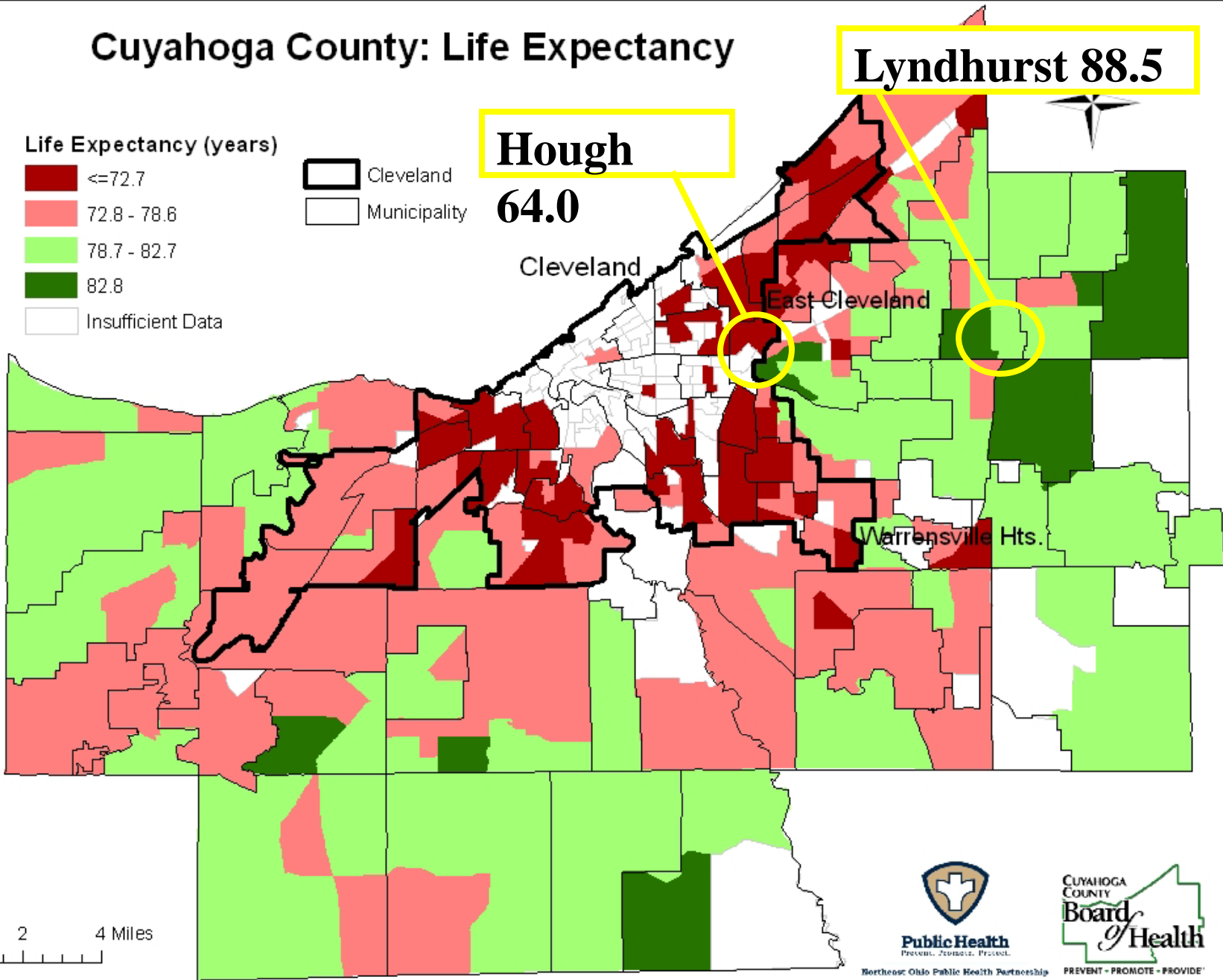
## Life Expectancy (years)

- <=72.7
- 72.8 - 78.6
- 78.7 - 82.7
- 82.8
- Insufficient Data

- Cleveland
- Municipality

**Hough**  
**64.0**

**Lyndhurst 88.5**



**Public Health**  
Prevent. Promote. Protect.

Northeast Ohio Public Health Partnership



PREVENT - PROMOTE - PROVIDE



# Options

## Options for Increasing Access to Healthy Food

- Developing new grocery stores
- Improving existing smaller stores
- Starting/sustaining farmers' markets, urban farms, community gardens
- Improving transportation options





# Options

## Why focus on Supermarkets & Larger Grocery Stores?

Because they:

- Improve quality of life
- Improve property values
- Create jobs
- Serve as retail anchors for commercial revitalization





# History of Grocery Stores

- Net Profit: <2 Pennies On Each \$1.00 of Food Sales
- Increased avg store size for efficiencies
- Increased competition from alternate format stores
- Increasing % of food \$\$ spent at restaurants

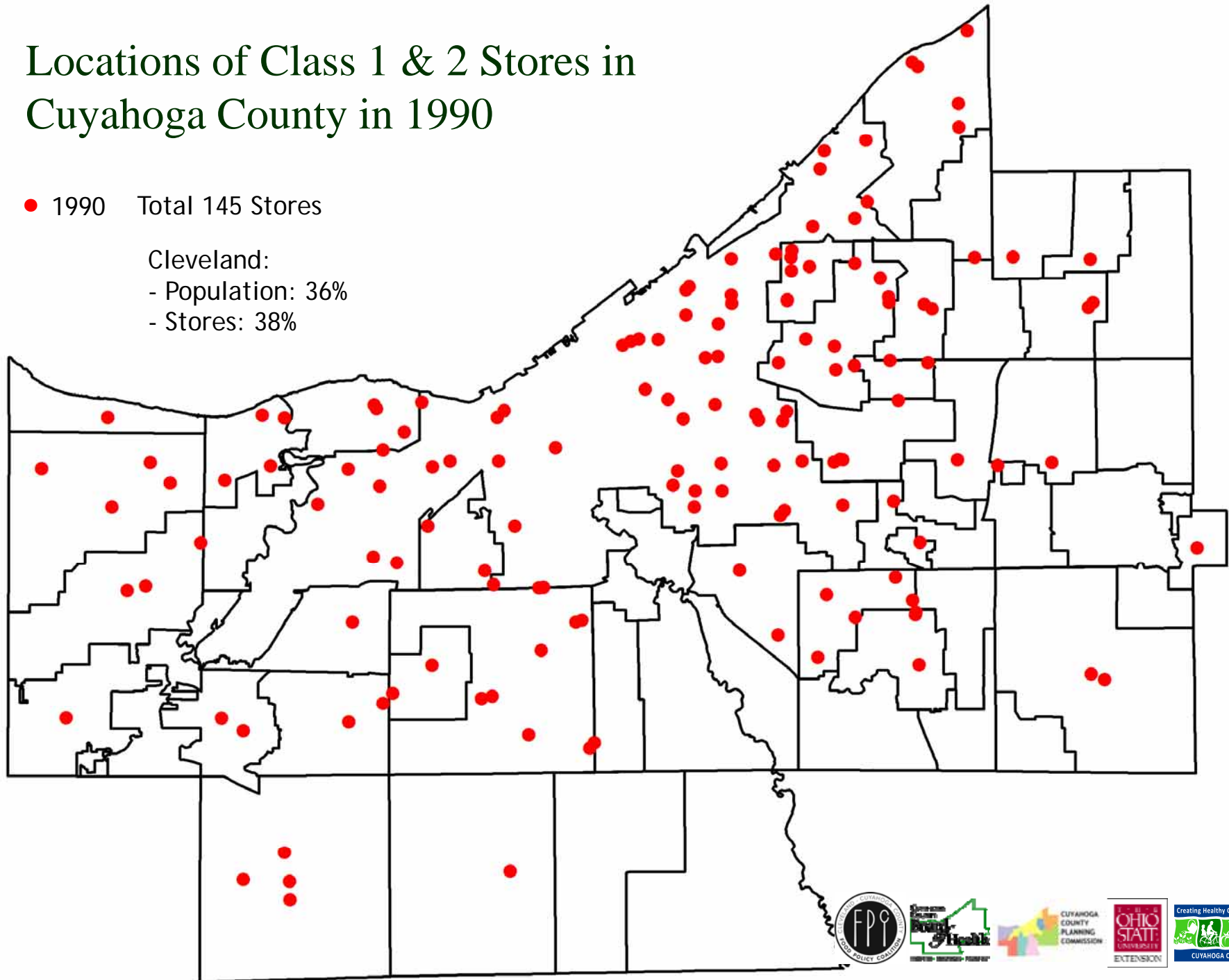


# Locations of Class 1 & 2 Stores in Cuyahoga County in 1990

● 1990 Total 145 Stores

Cleveland:

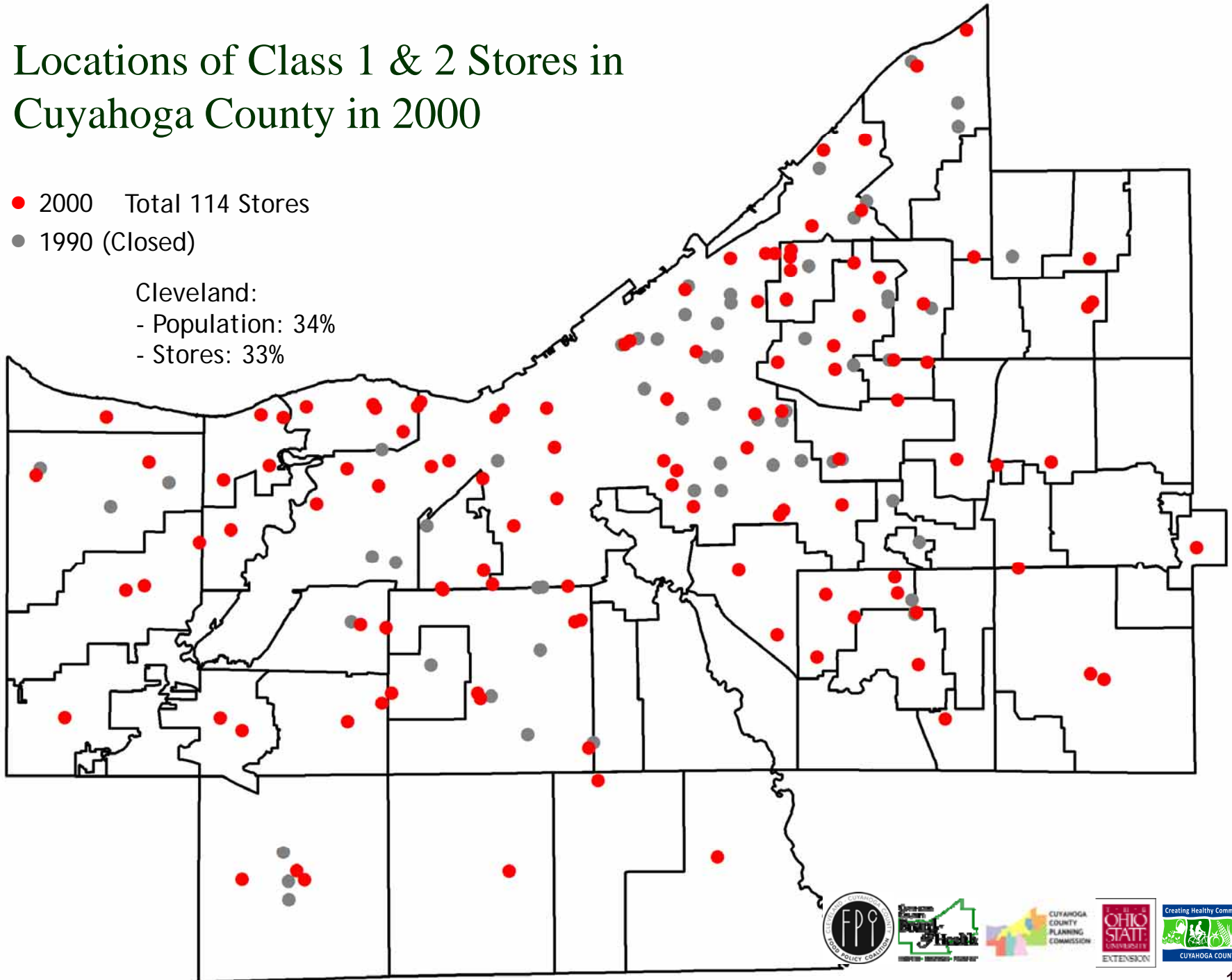
- Population: 36%
- Stores: 38%



# Locations of Class 1 & 2 Stores in Cuyahoga County in 2000

- 2000 Total 114 Stores
- 1990 (Closed)

Cleveland:  
- Population: 34%  
- Stores: 33%



# Locations of Class 1 & 2 Stores in Cuyahoga County in 2010

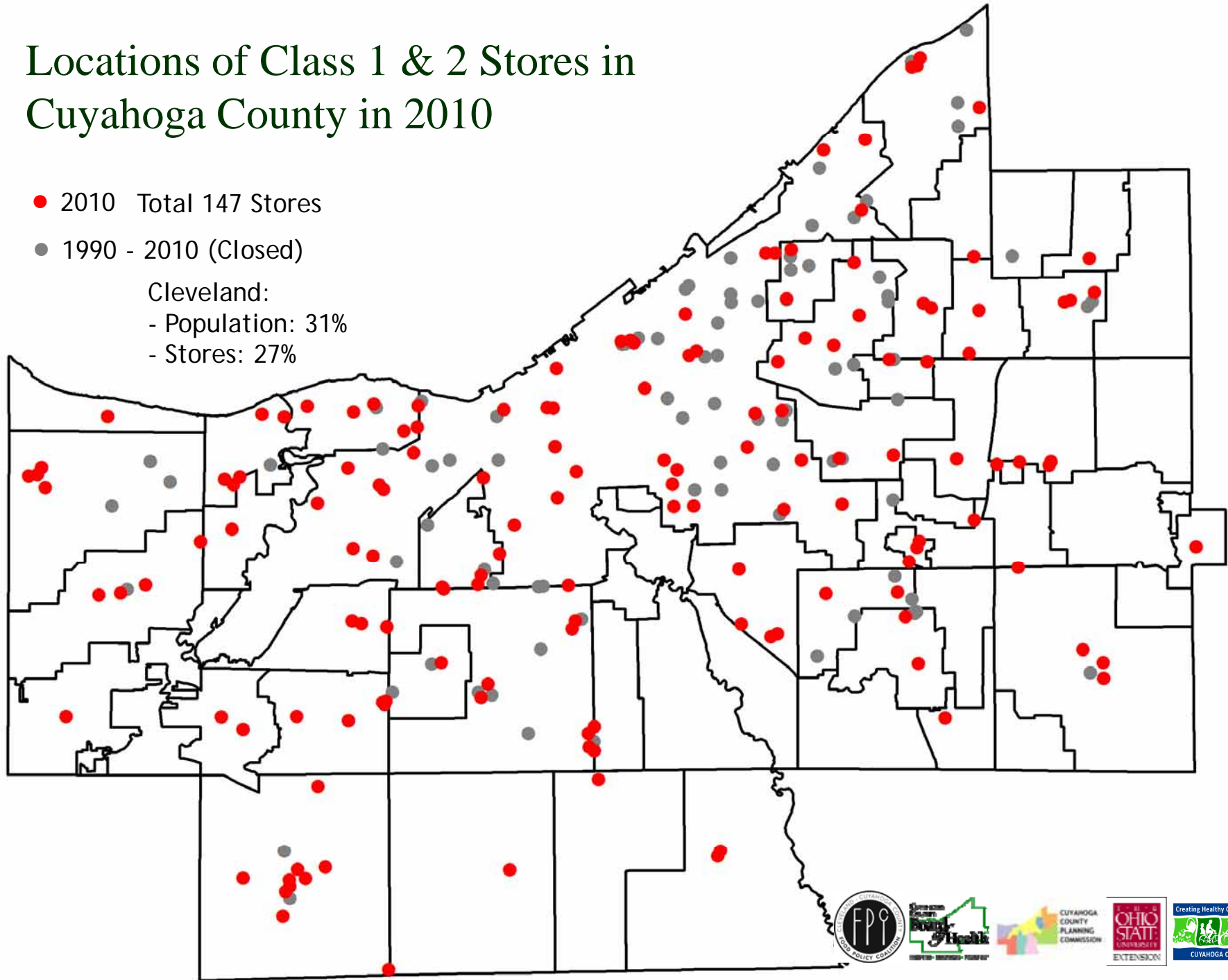
● 2010 Total 147 Stores

● 1990 - 2010 (Closed)

Cleveland:

- Population: 31%

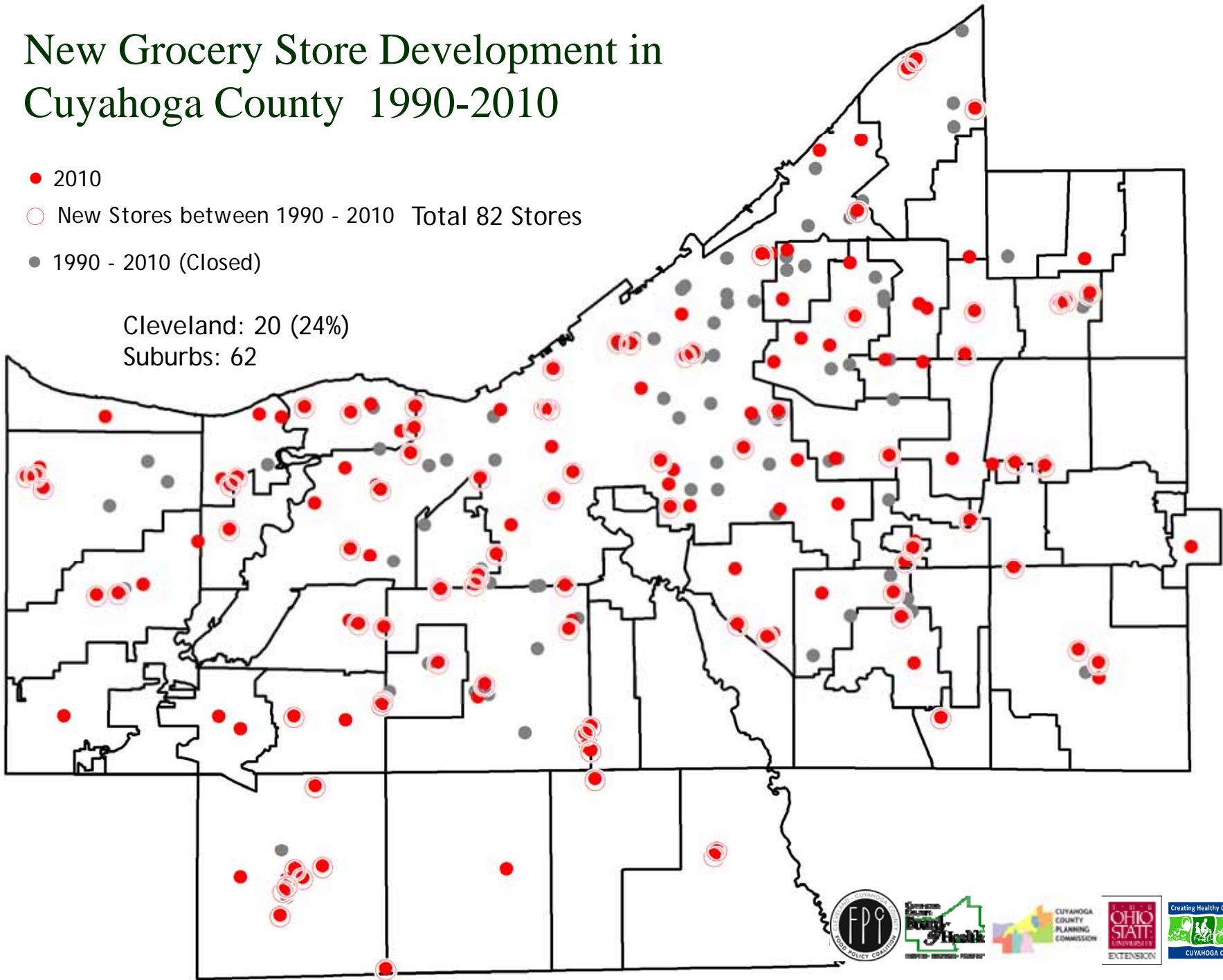
- Stores: 27%



# New Grocery Store Development in Cuyahoga County 1990-2010

- 2010
- New Stores between 1990 - 2010 Total 82 Stores
- 1990 - 2010 (Closed)

Cleveland: 20 (24%)  
Suburbs: 62





# Obstacles to New Store Development in Low-Income Neighborhoods

- Purchasing power in Low-Income neighborhoods
- Crime and/or perception of crime
- Difficulty finding/securing sites
- Increased development costs
- Higher operating costs
- Lack of adequate financing
- Consumer preferences in racially diverse market



# Measuring Access





# Locations of Food Retail Stores

Licensed by Bds of Health

2010



# Locations of Food Retail Stores

Licensed by Bds of Health

2010

This study focuses on stores in Class 1 & 2



Class	Description	Count
1	Supermarket	76
2	Grocery Store	91
3	Small Grocery	31
4	Corner Store	337
5	Gas Station / Food Mart	278
6	Convenience	440
7	Farmers Markets	8
9	Full Service Restaurants	8
10	Chain Fast Foods	75
11	Other Limited Service	361
12	Bars/lounges	1
88	Specialty Foods	58
99	Institutional	19
		1,783

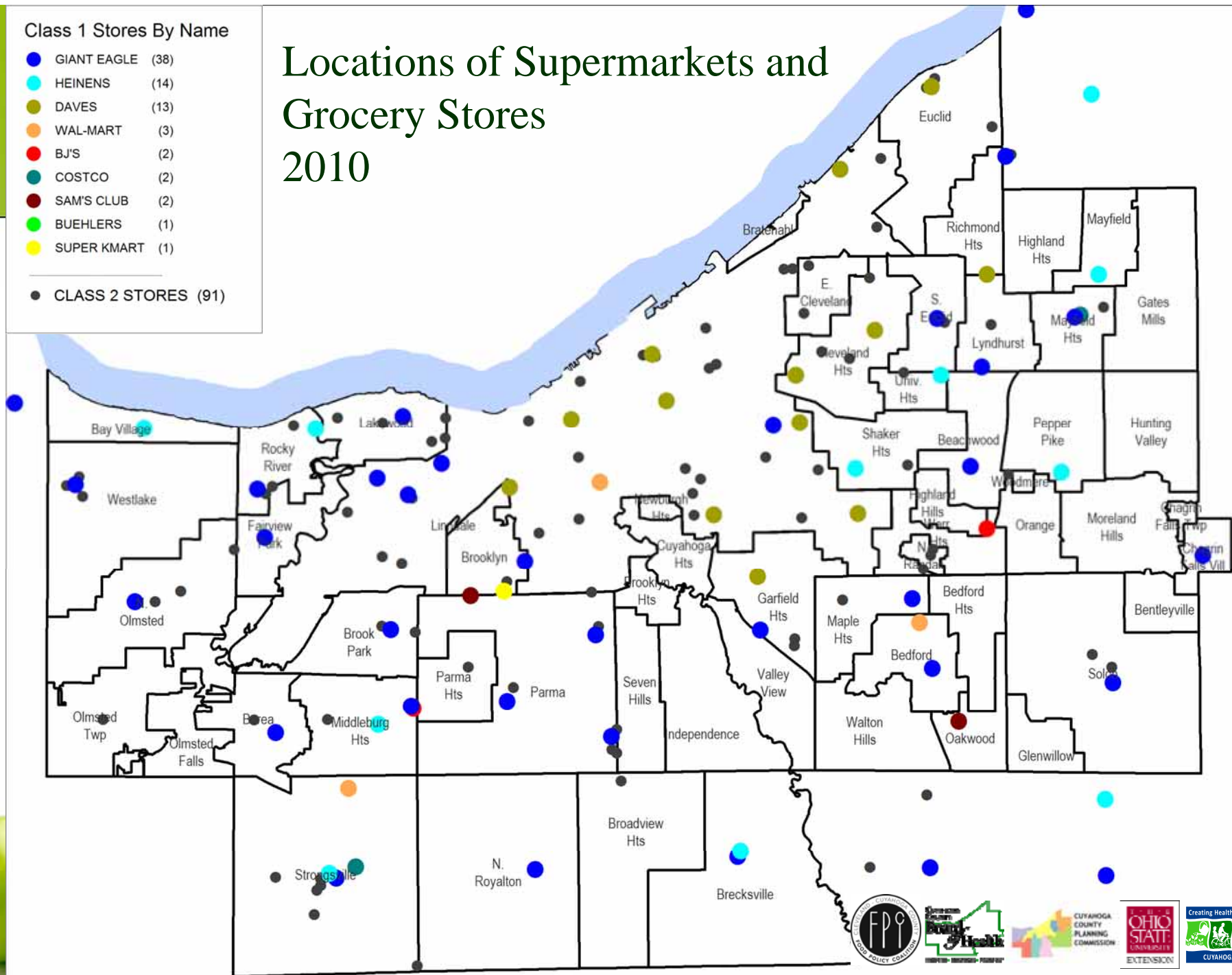
Food Retail Type [class]	Operational Definition	Examples
Supermarket [1]	<ul style="list-style-type: none"> <li>A large self-service grocery store selling a variety of groceries, dairy products, and household goods</li> <li>Raw meat cut in store, goods baked in store AND more than 5 cash registers</li> <li>Offers a variety of other services (e.g. check cashing/bill pay/pharmacy)</li> <li>Carries at least 11 varieties of both fresh fruits/vegetables AND offers at least 3 varieties of milk (including low-fat milk)</li> </ul>	<ul style="list-style-type: none"> <li>Giant Eagle</li> <li>Heinen's</li> <li>Dave's Market</li> </ul>
Grocery Store [2]	<ul style="list-style-type: none"> <li>A smaller chain or non-chain store that offers fewer options compared to a supermarket</li> <li>Carries at least 6 different varieties of both fresh fruits/vegetables</li> <li>Offers low-fat milk as an option</li> <li>Carries fresh raw meat, eggs, and a variety of fresh bread, grains, and cereal</li> <li>Has at least 5,000 square feet of floor area</li> </ul>	<ul style="list-style-type: none"> <li>Marc's</li> <li>Aldi</li> <li>Sav-A-Lot</li> <li>Konnis</li> </ul>
Small Grocery Store [3]	<ul style="list-style-type: none"> <li>Do not have a variety of departments (Deli, bakery...etc)</li> <li>Offers at least one variety of milk</li> <li>Carries at least 2 varieties of fresh fruits and veggies</li> </ul>	<ul style="list-style-type: none"> <li>Sav-Mor</li> <li>Eagle Market</li> </ul>
Corner store [4]	<ul style="list-style-type: none"> <li>Smaller, non-chain, independently-owned stores that may also sell a variety of general merchandise and food</li> <li>Majority of their products is dedicated to food and beverage; &gt;50% of the aisles* are dedicated to food and beverage</li> <li>Offer the sale of alcohol</li> </ul>	
Gas Station/Food Mart [5]	<ul style="list-style-type: none"> <li>Gas stations combined with a convenience-type store</li> <li>They sell gas and may or may not sell a variety of sandwiches, beverages, and a selective section of food items</li> </ul>	
Convenience Store [6]	<ul style="list-style-type: none"> <li>Smaller stores whose main purpose is not the sale of food items</li> <li>A smaller store that sells a variety of shelf-stable foods and goods such as bread, soda, and snacks</li> <li>Provide a selection of non-perishable items and a limited selection of fresh fruits and vegetables, if any</li> <li>&lt;50% of the aisles dedicated to food and beverage (aisle count)</li> </ul>	<ul style="list-style-type: none"> <li>Walgreen's</li> <li>Rite Aide</li> <li>Dollar Store</li> <li>General Dollar</li> </ul>

# Locations of Supermarkets and Grocery Stores 2010

## Class 1 Stores By Name

- GIANT EAGLE (38)
- HEINENS (14)
- DAVES (13)
- WAL-MART (3)
- BJ'S (2)
- COSTCO (2)
- SAM'S CLUB (2)
- BUEHLERS (1)
- SUPER KMART (1)

● CLASS 2 STORES (91)



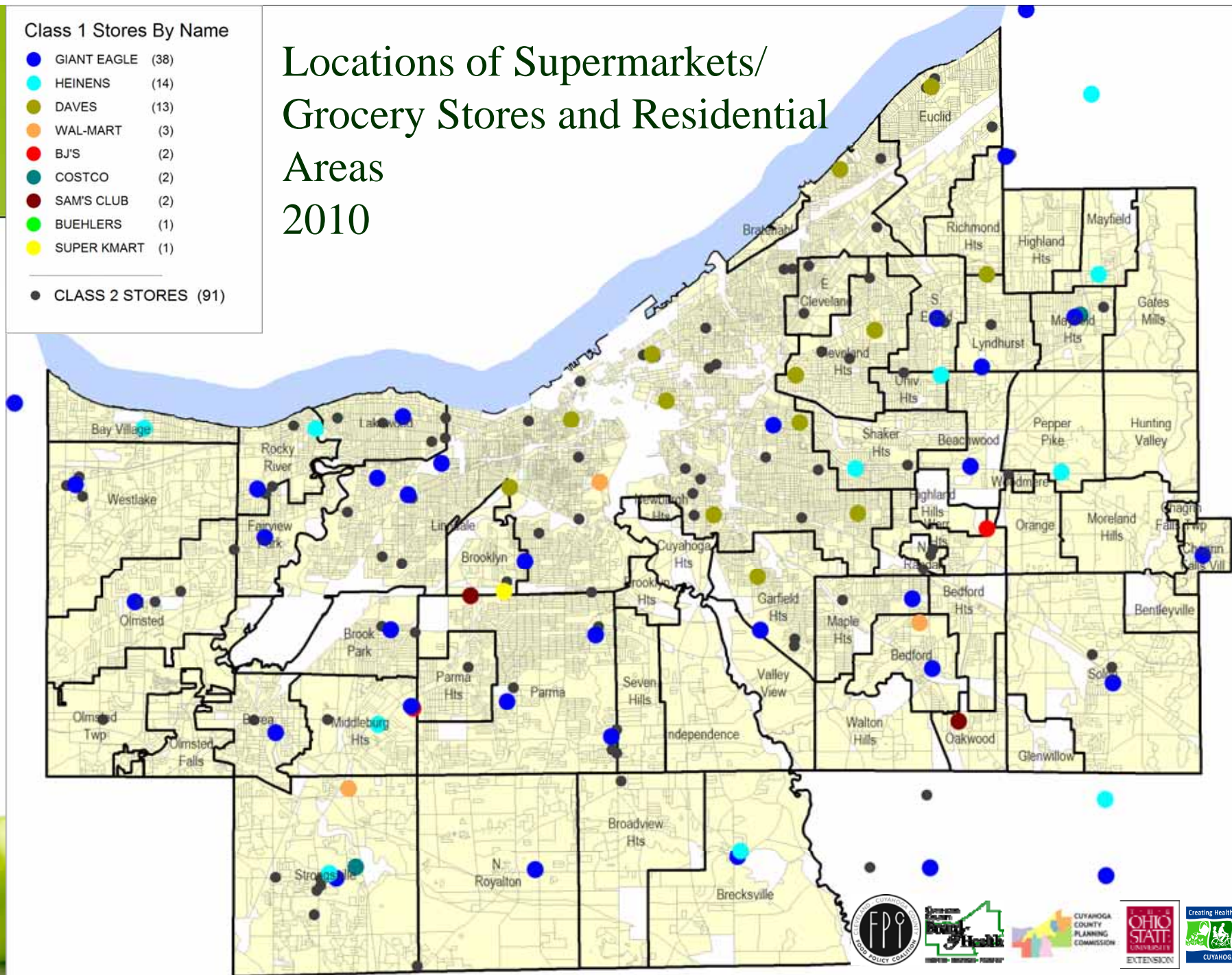


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# Locations of Supermarkets/ Grocery Stores and Residential Areas 2010



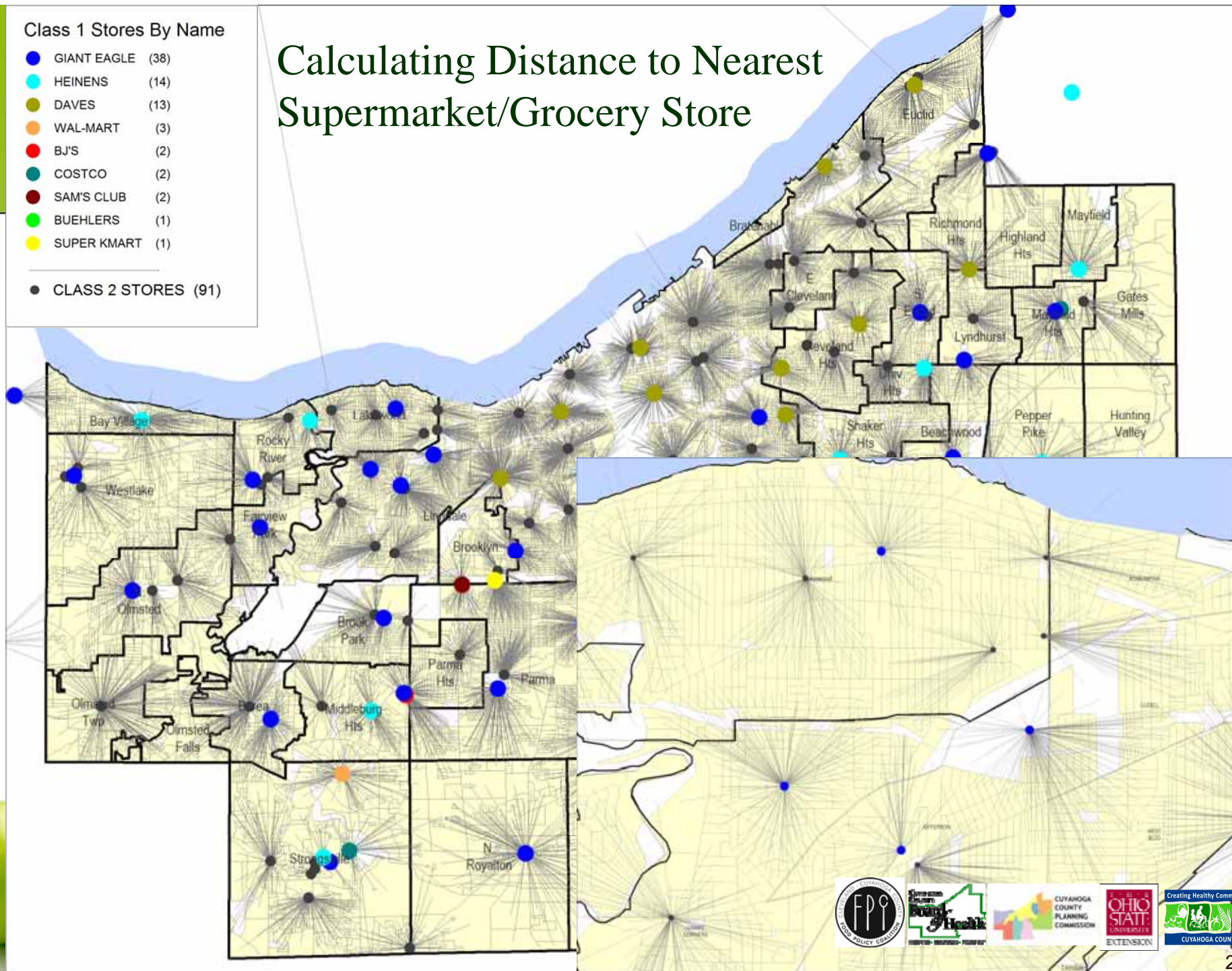


# Calculating Distance to Nearest Supermarket/Grocery Store

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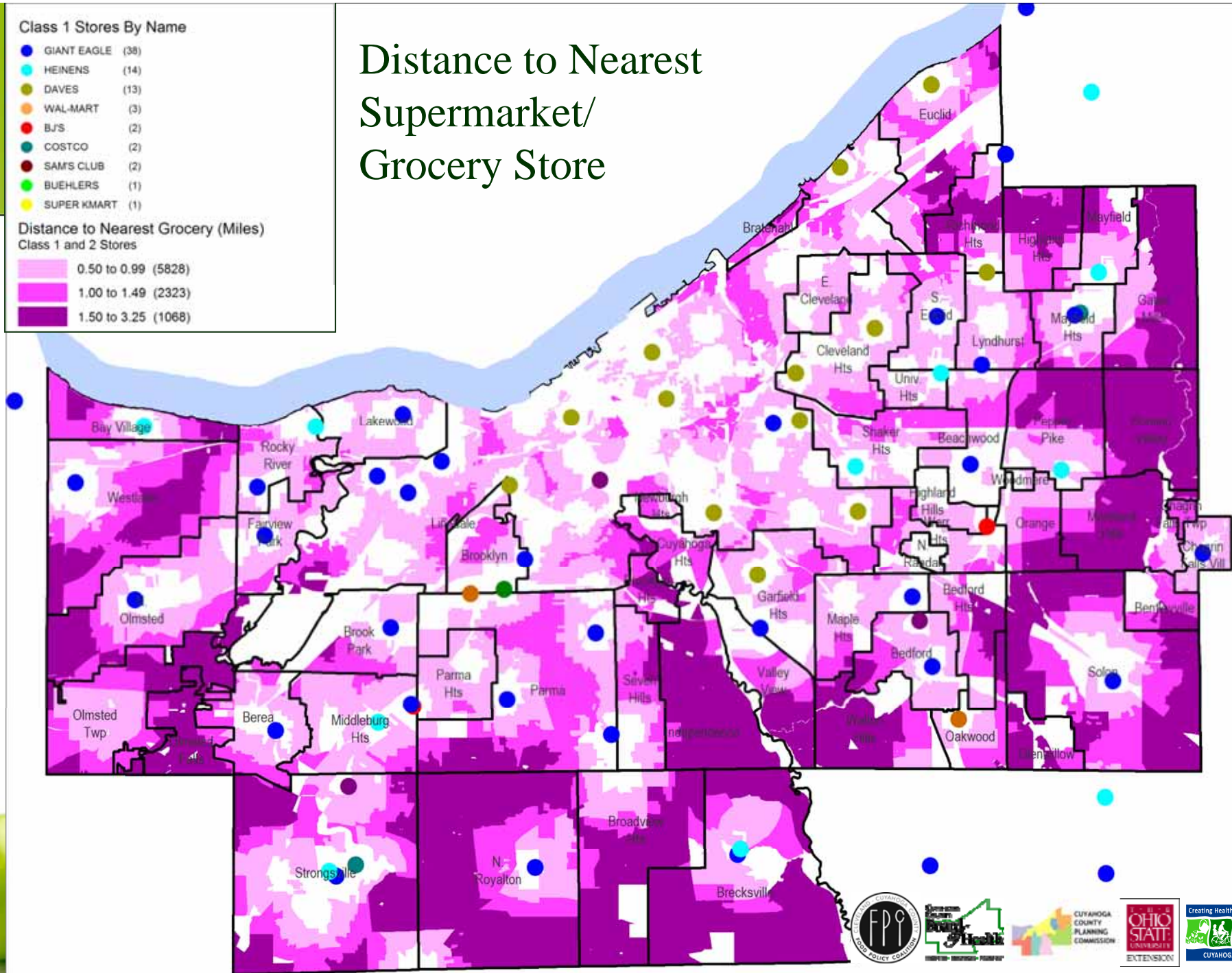
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## Distance to Nearest Grocery (Miles) Class 1 and 2 Stores

- 0.50 to 0.99 (5828)
- 1.00 to 1.49 (2323)
- 1.50 to 3.25 (1068)



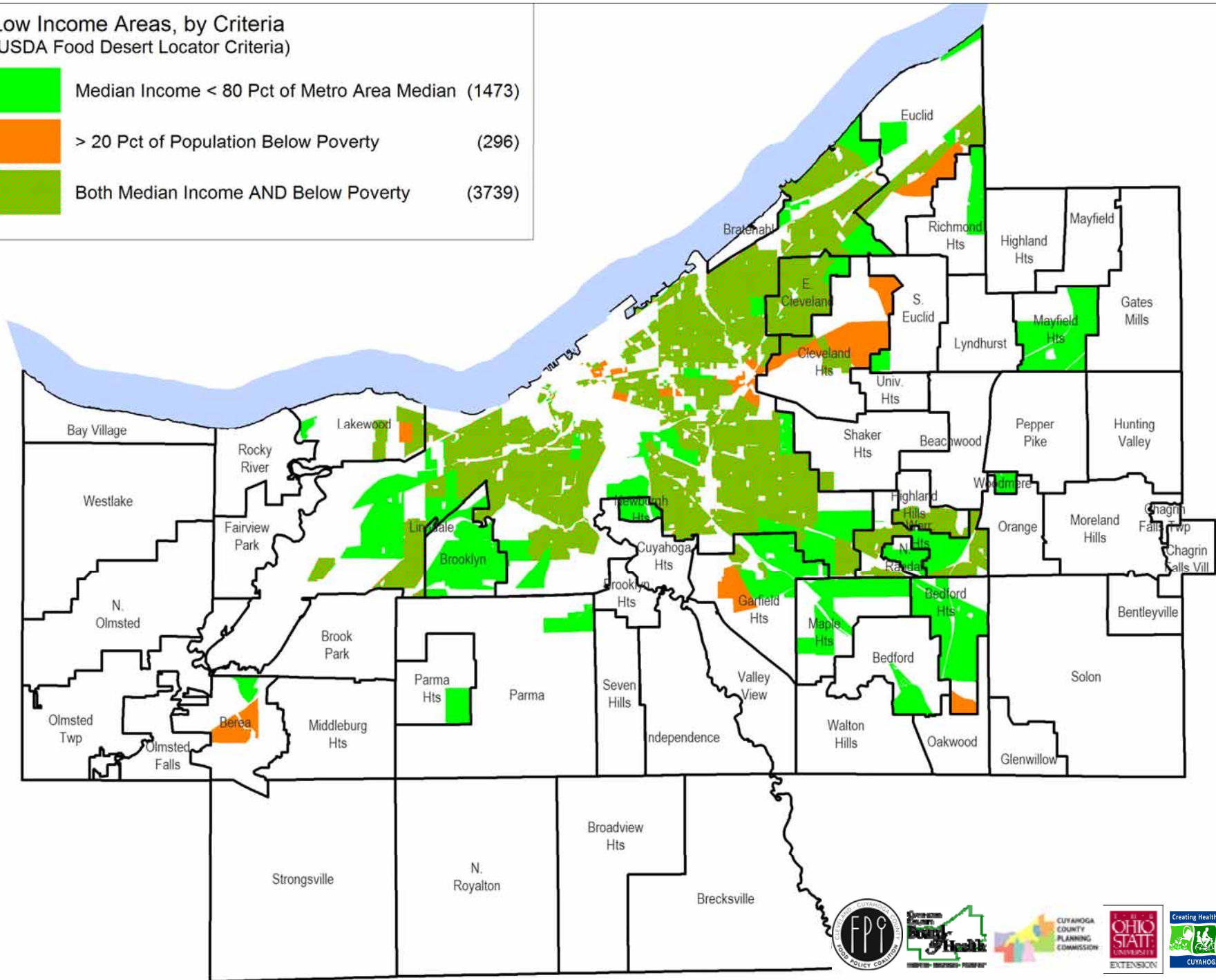
# Demographic Factors Affecting Food Access








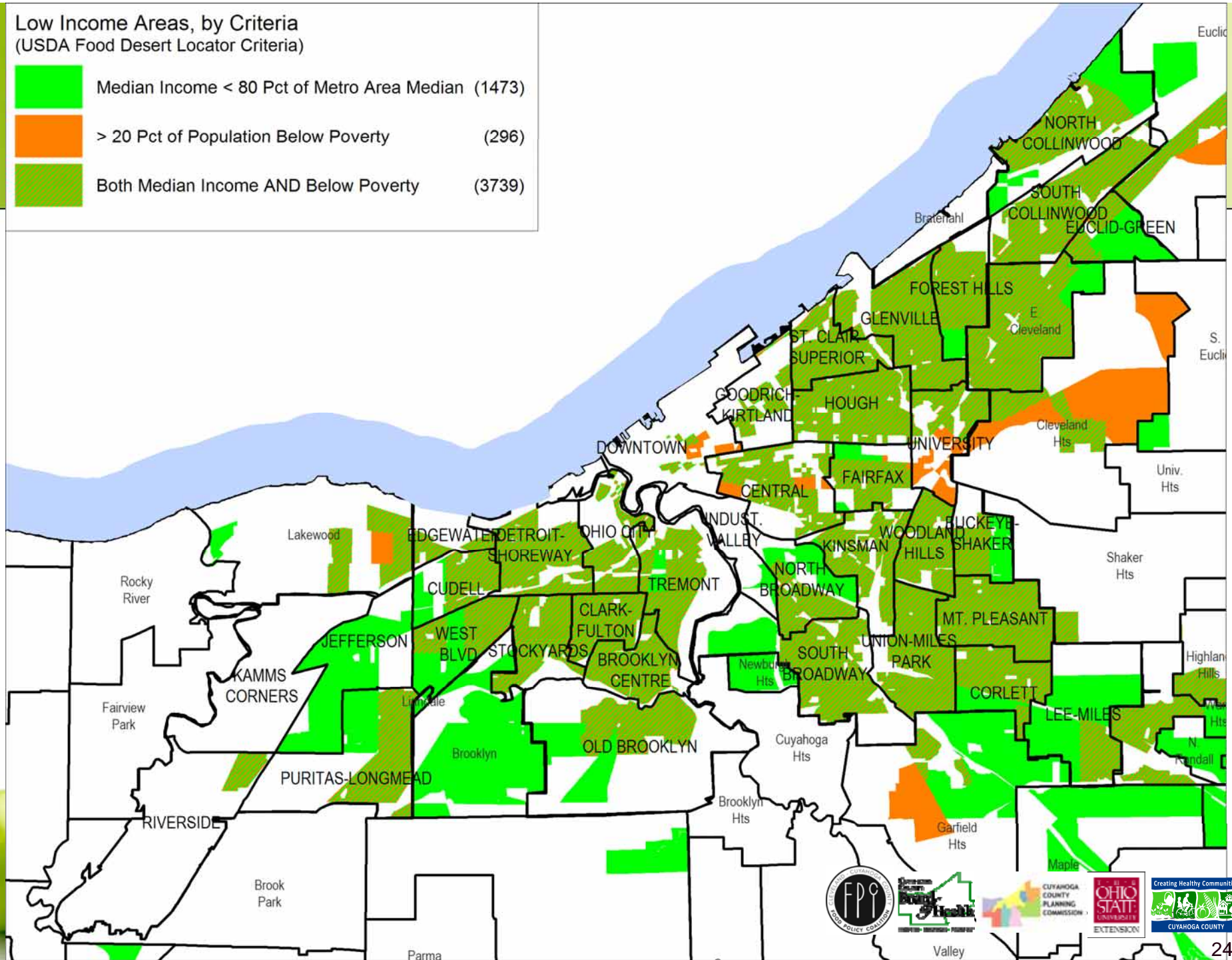
**Low Income Areas, by Criteria**  
(USDA Food Desert Locator Criteria)

- Median Income < 80 Pct of Metro Area Median (1473)
- > 20 Pct of Population Below Poverty (296)
- Both Median Income AND Below Poverty (3739)



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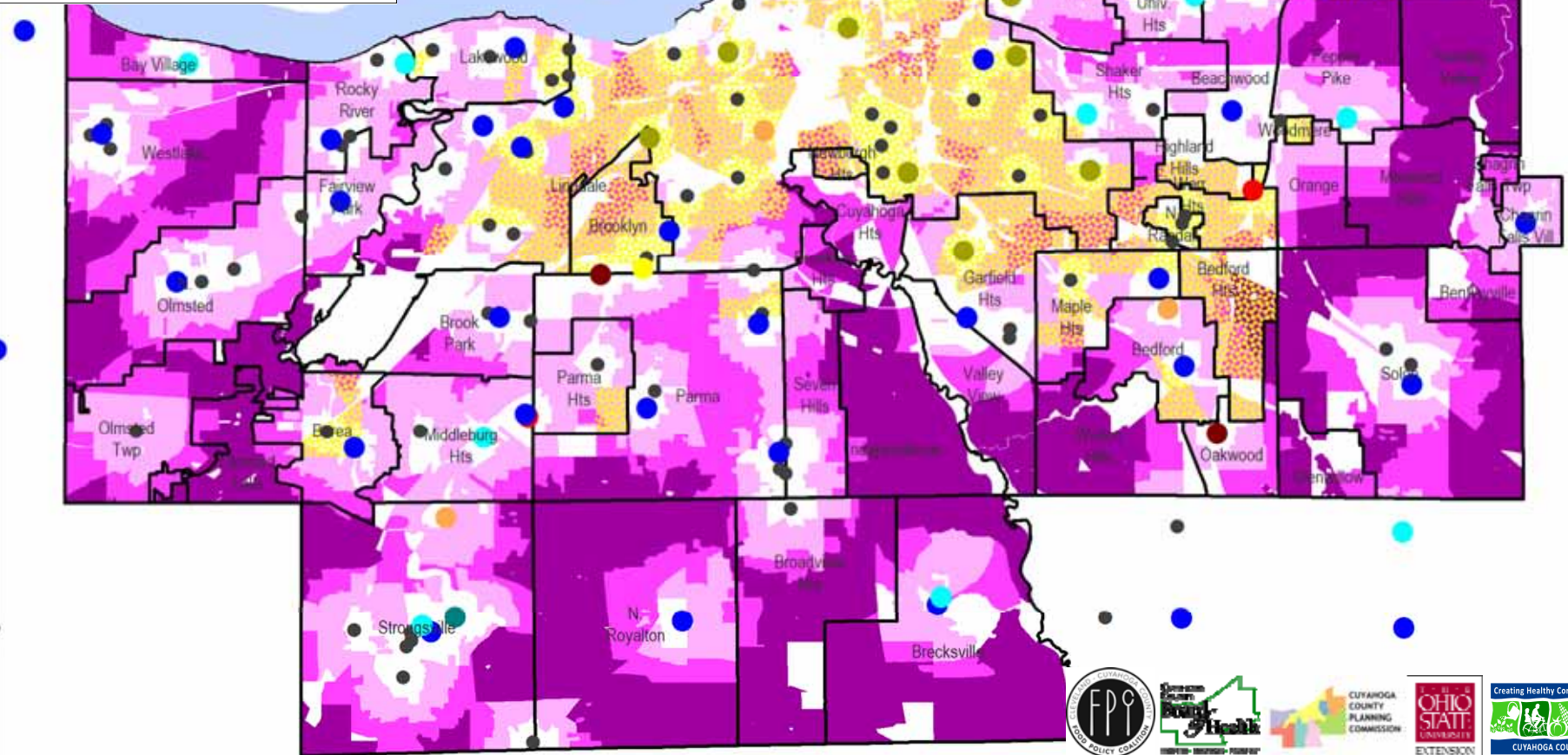
# Applying Low Income Criteria to Distance from Grocery Stores

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- Low Income Area



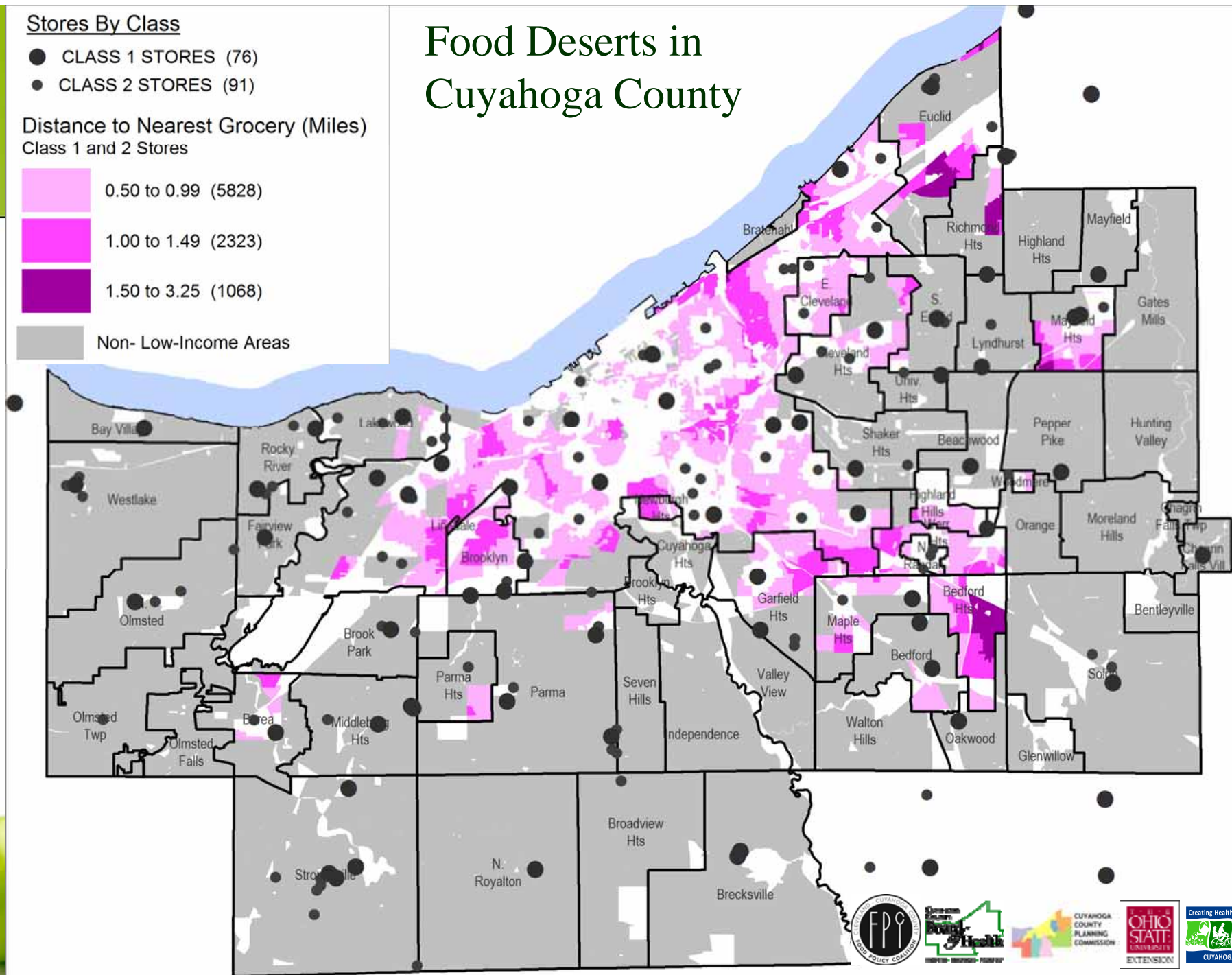
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Distance to Nearest Grocery (Miles)  
Class 1 and 2 Stores



# Food Deserts in Cuyahoga County





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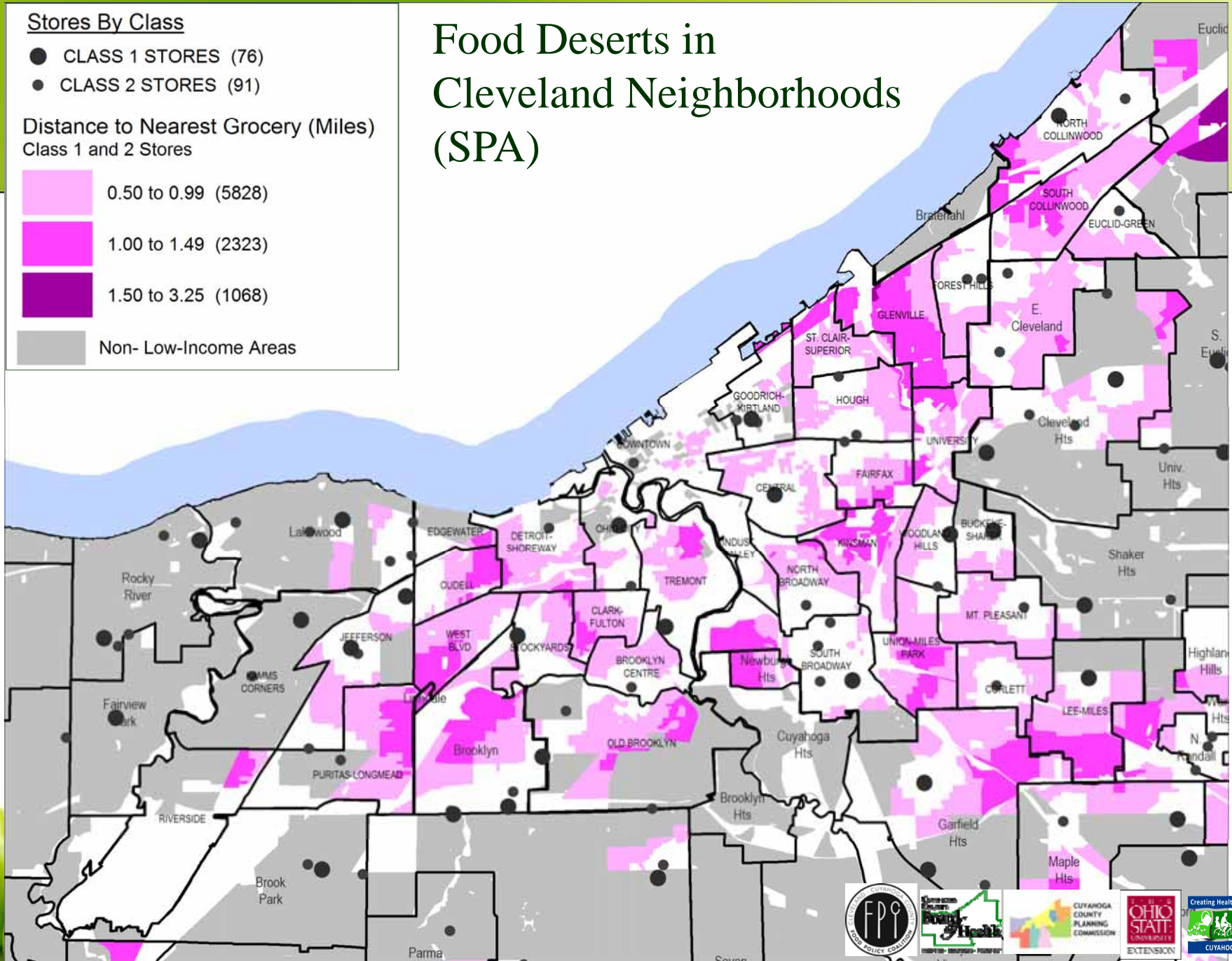
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Non- Low-Income Areas

# Food Deserts in Cleveland Neighborhoods (SPA)



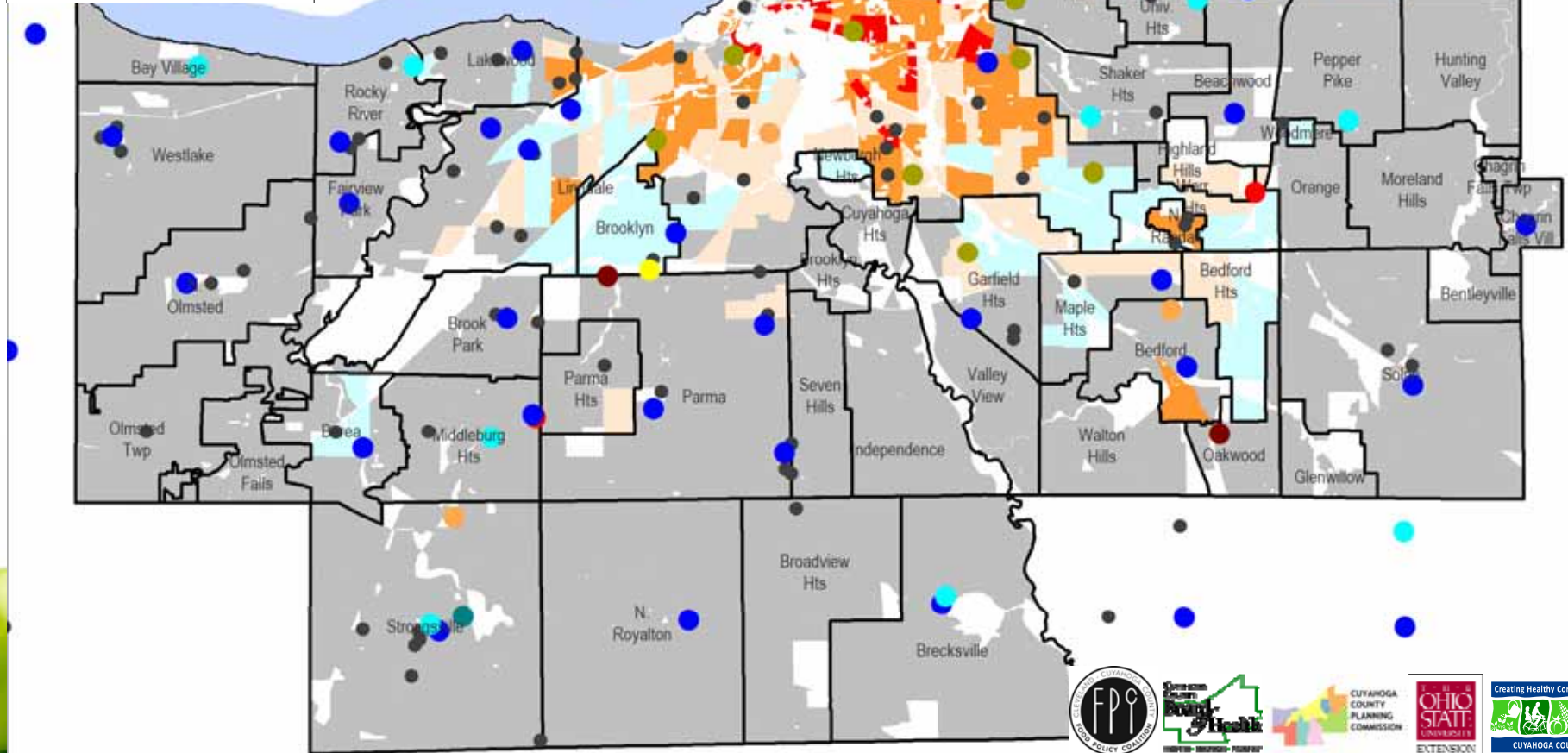
# Percent of Households Without A Vehicle Cuyahoga County

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## Percent of Households Without Vehicles

- 50% or More (Very Low Ownership)
- 25 to 50% (Low Ownership)
- 12.7 to 25% (High Ownership)
- Less than 12.7% (Very High Ownership)





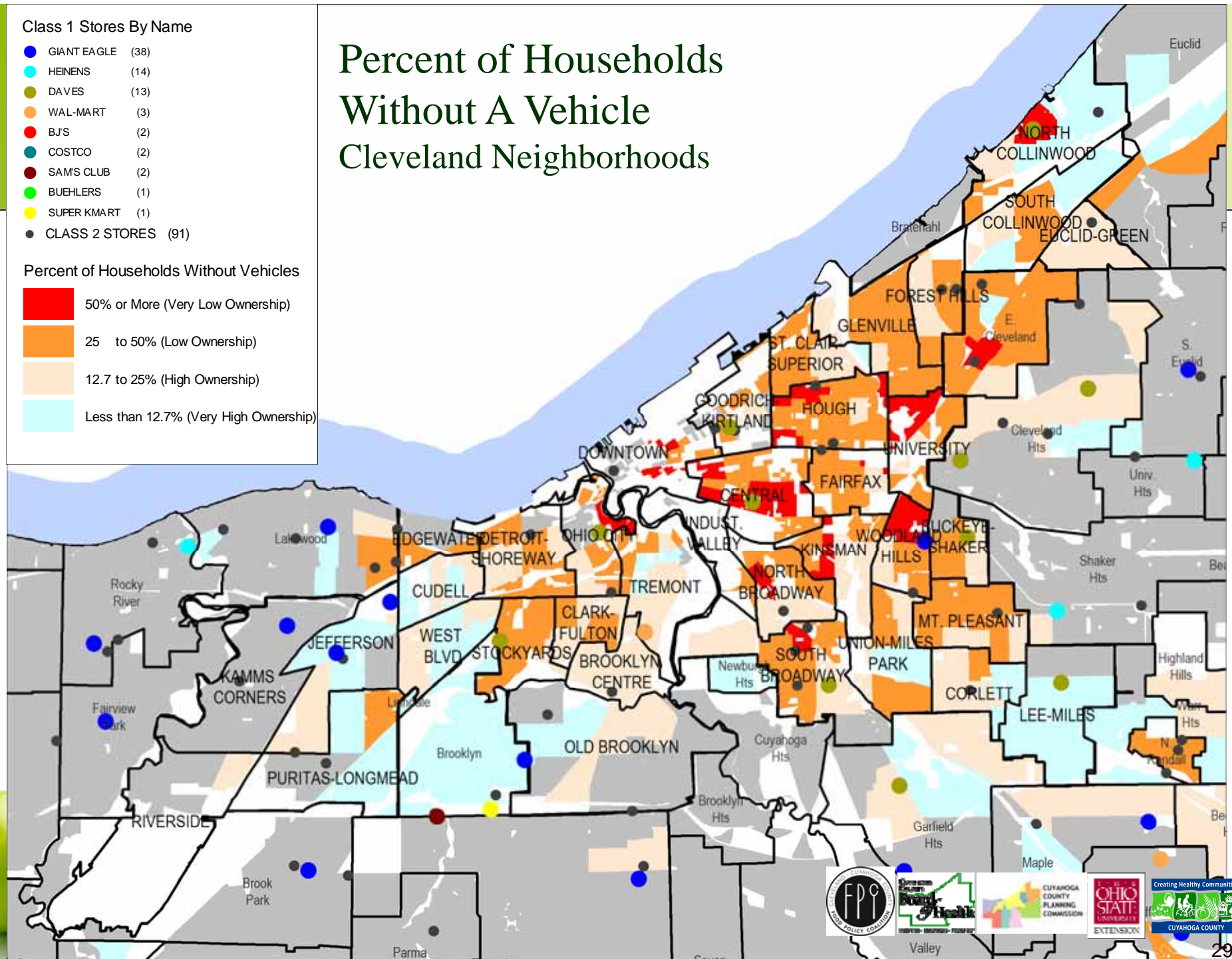
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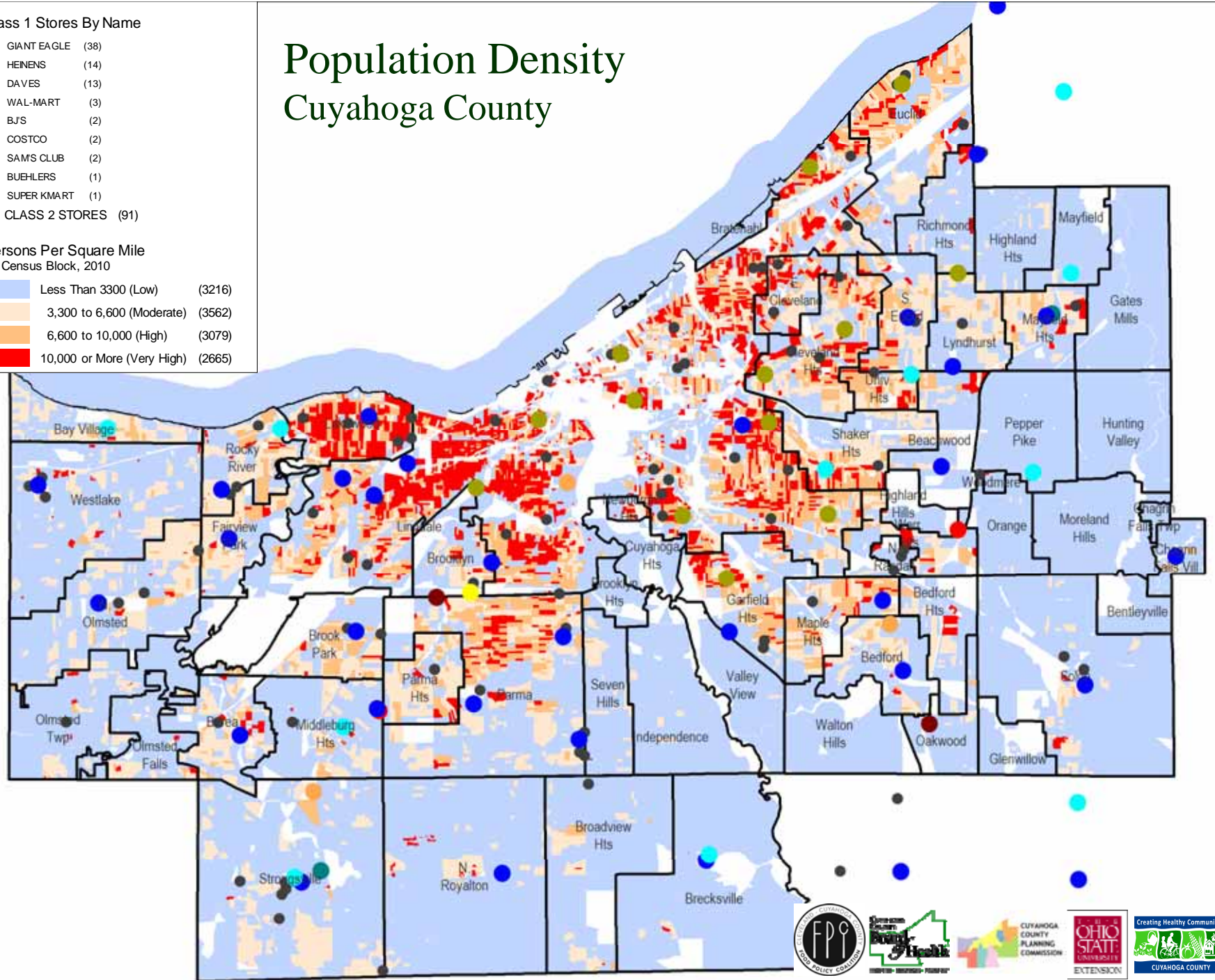
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## Persons Per Square Mile By Census Block, 2010

- Less Than 3300 (Low) (3216)
- 3,300 to 6,600 (Moderate) (3562)
- 6,600 to 10,000 (High) (3079)
- 10,000 or More (Very High) (2665)





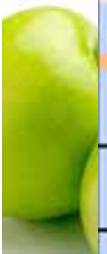
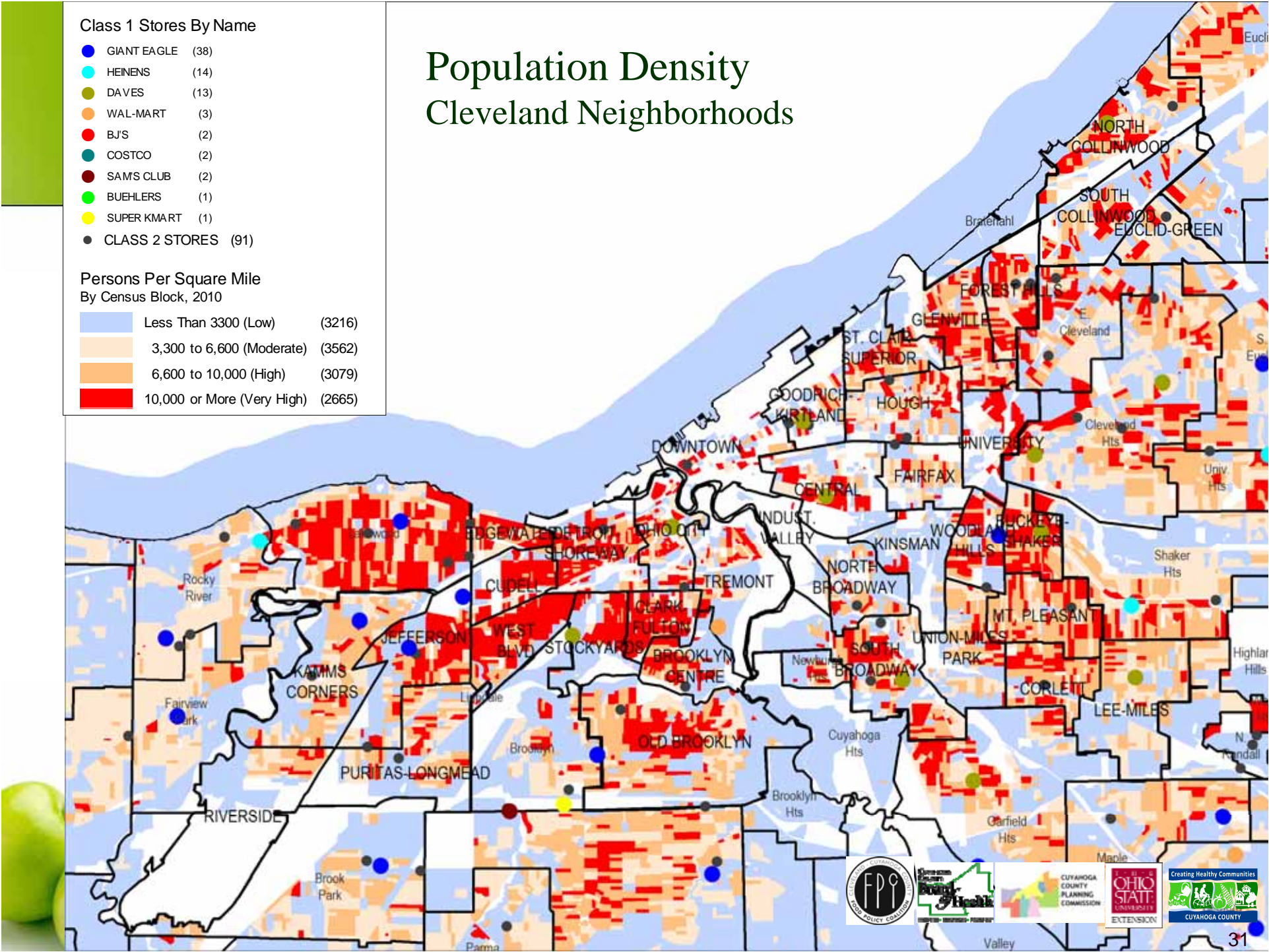
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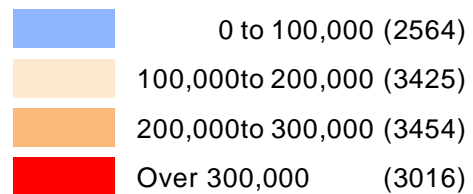
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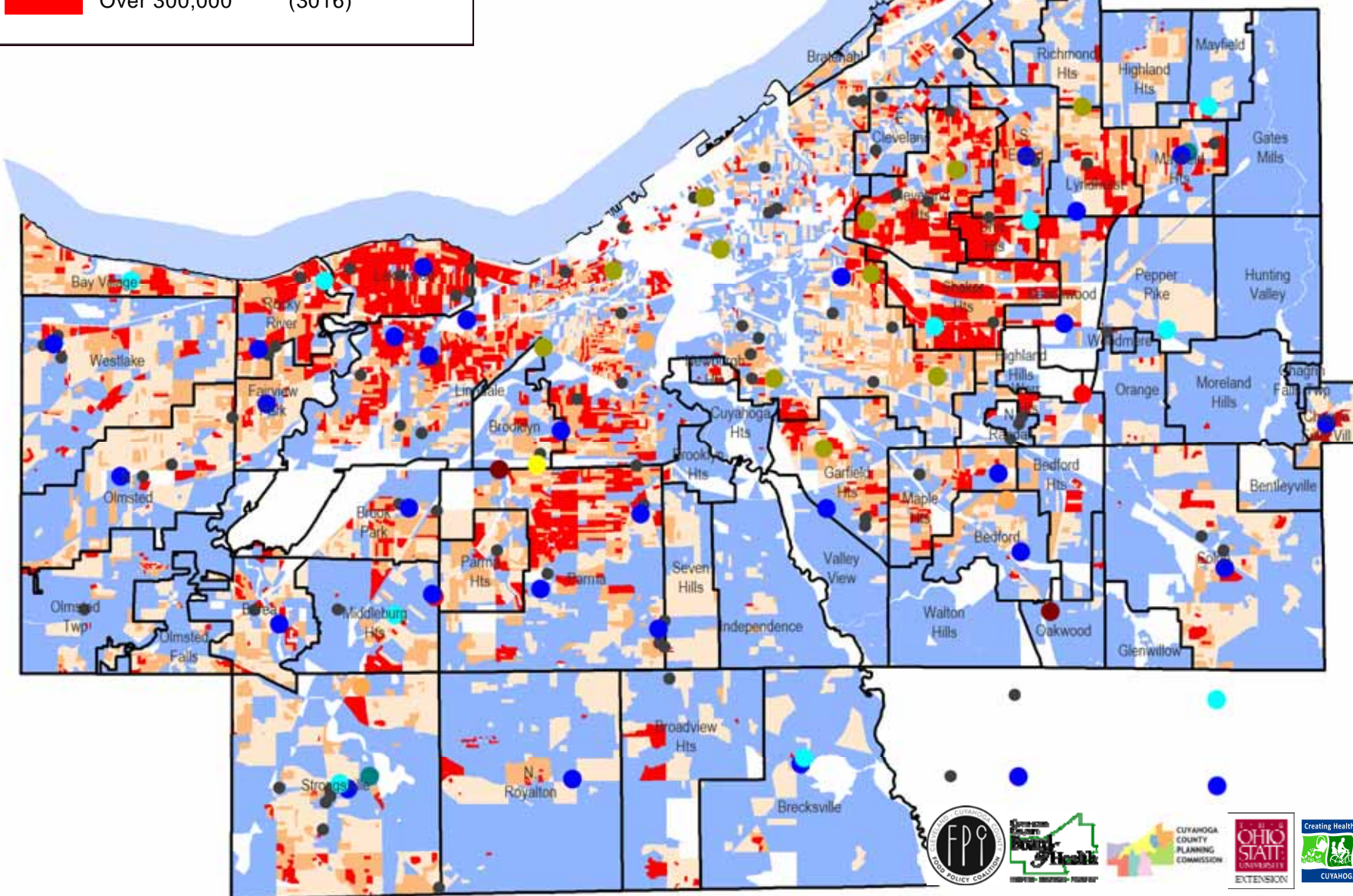




Aggregate Household Income Per Acre (\$)

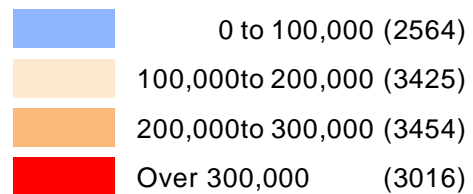


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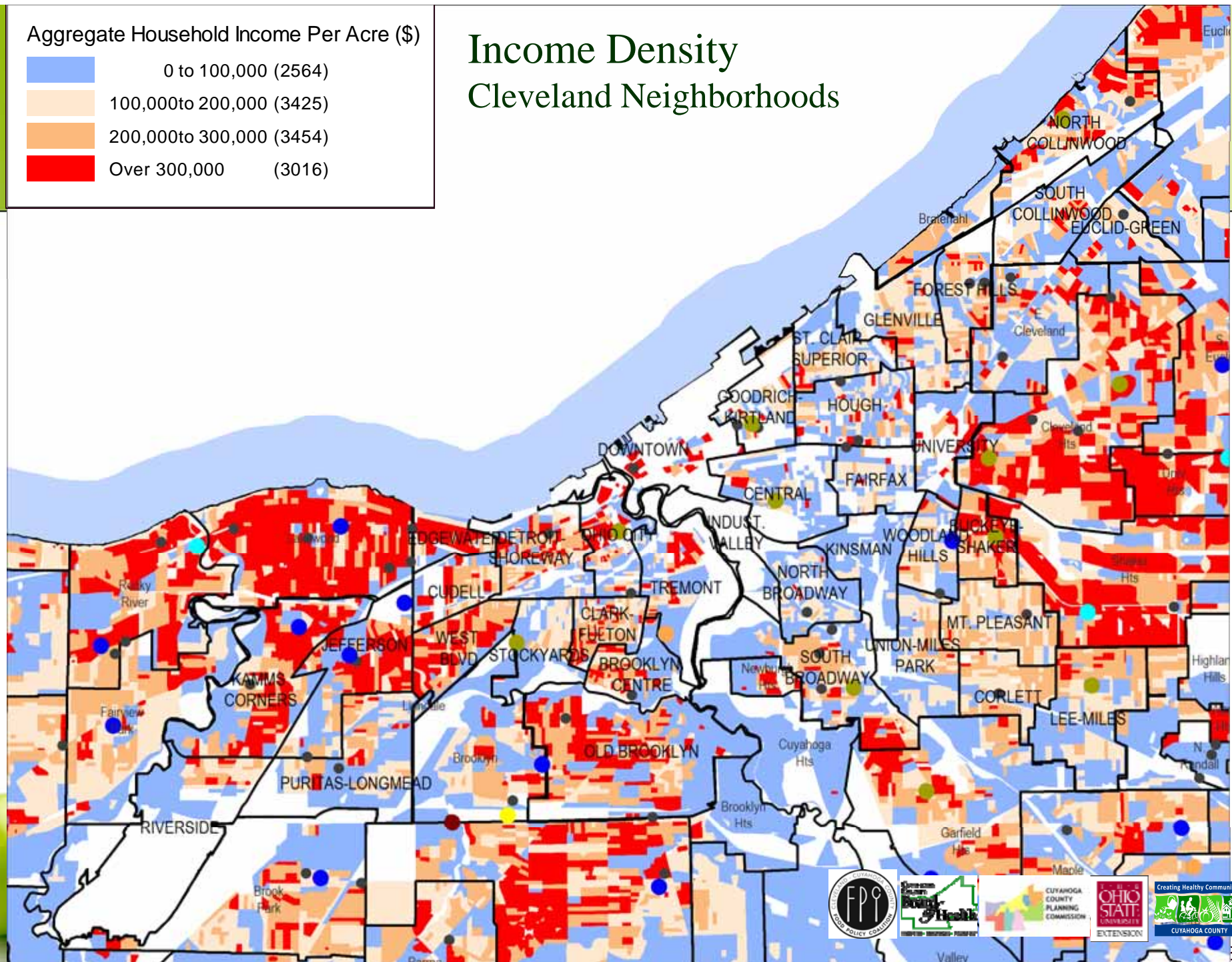




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# Income Density Cleveland Neighborhoods



# Areas with Highest Concentration: Low-Income Distance from Grocery





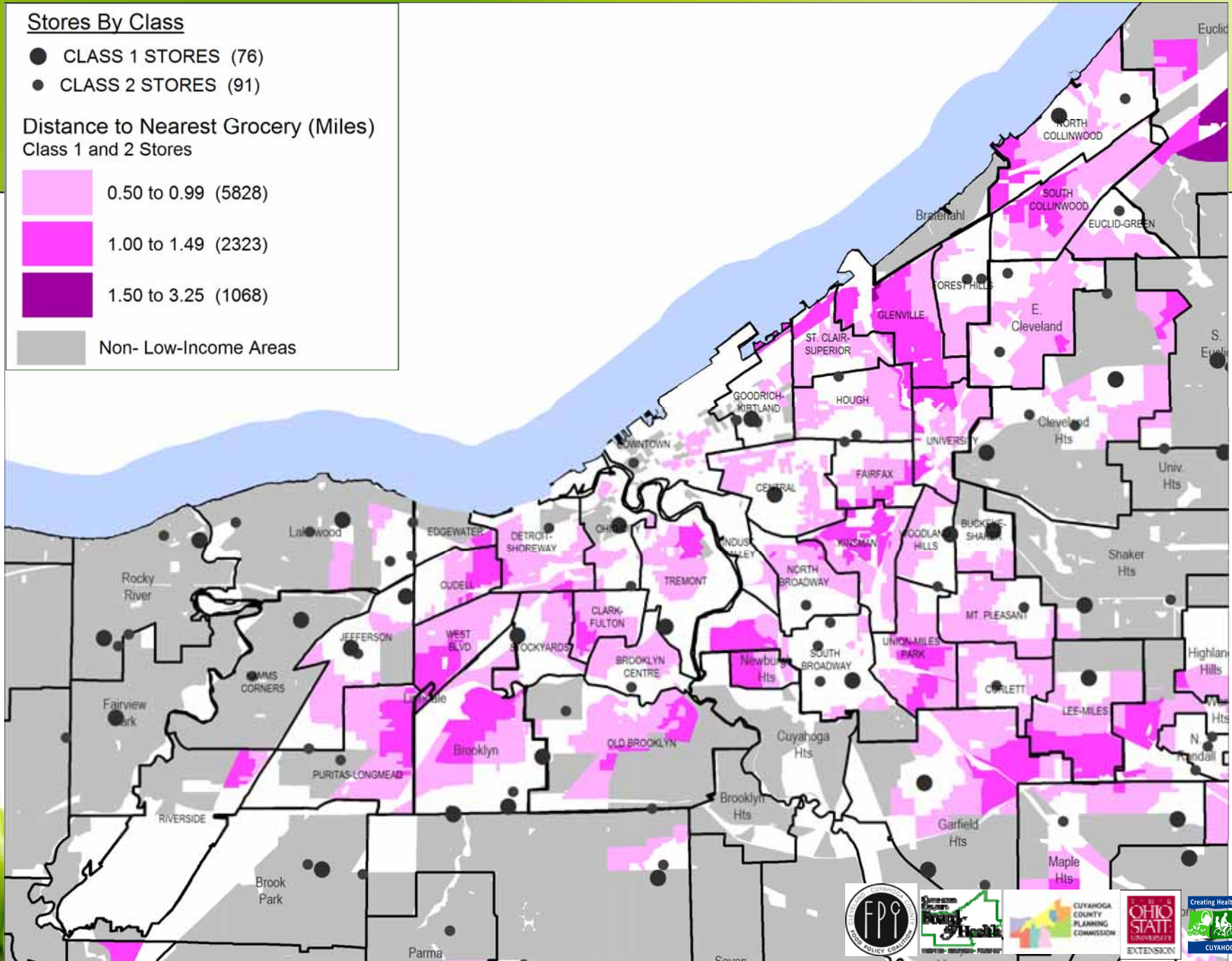
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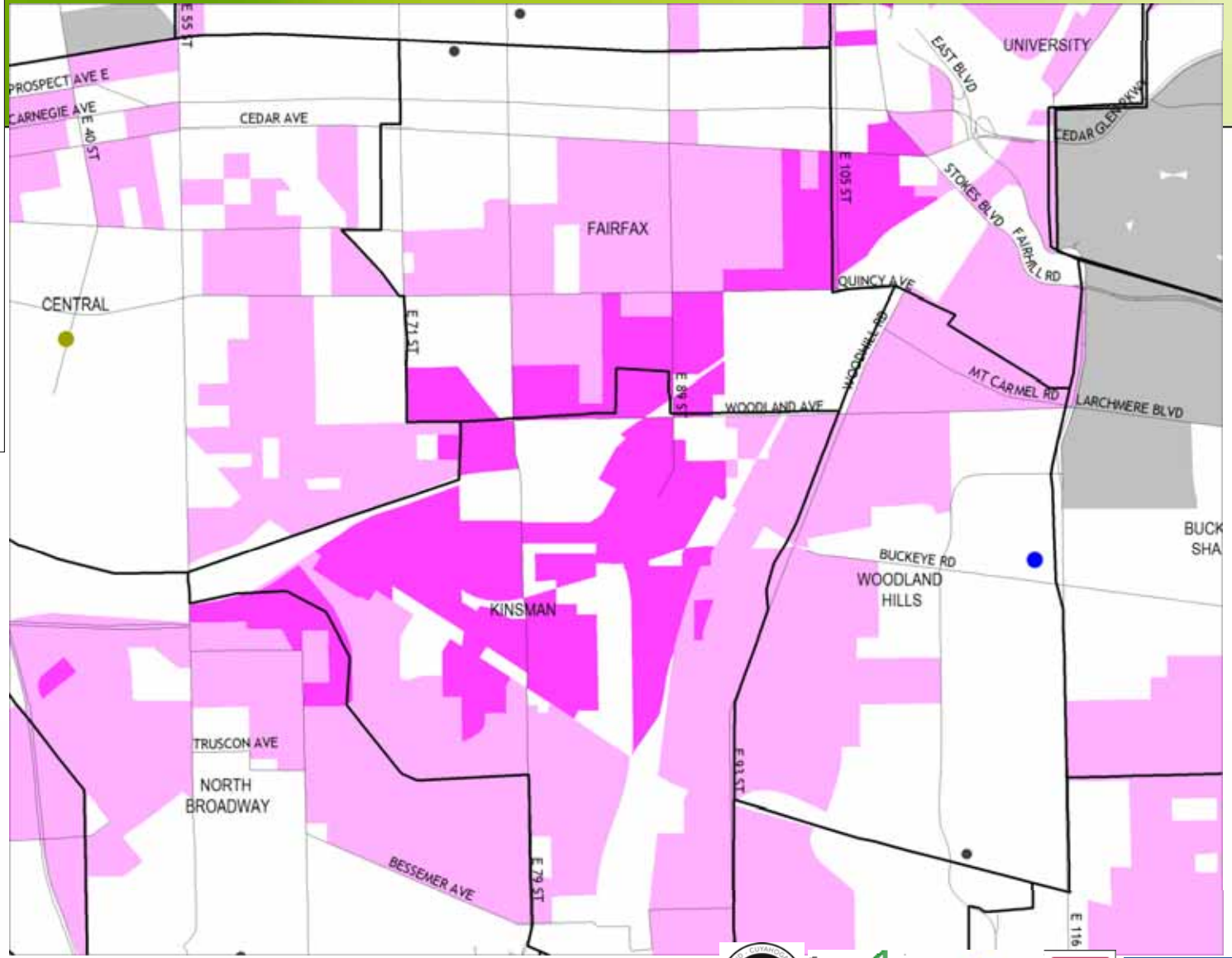
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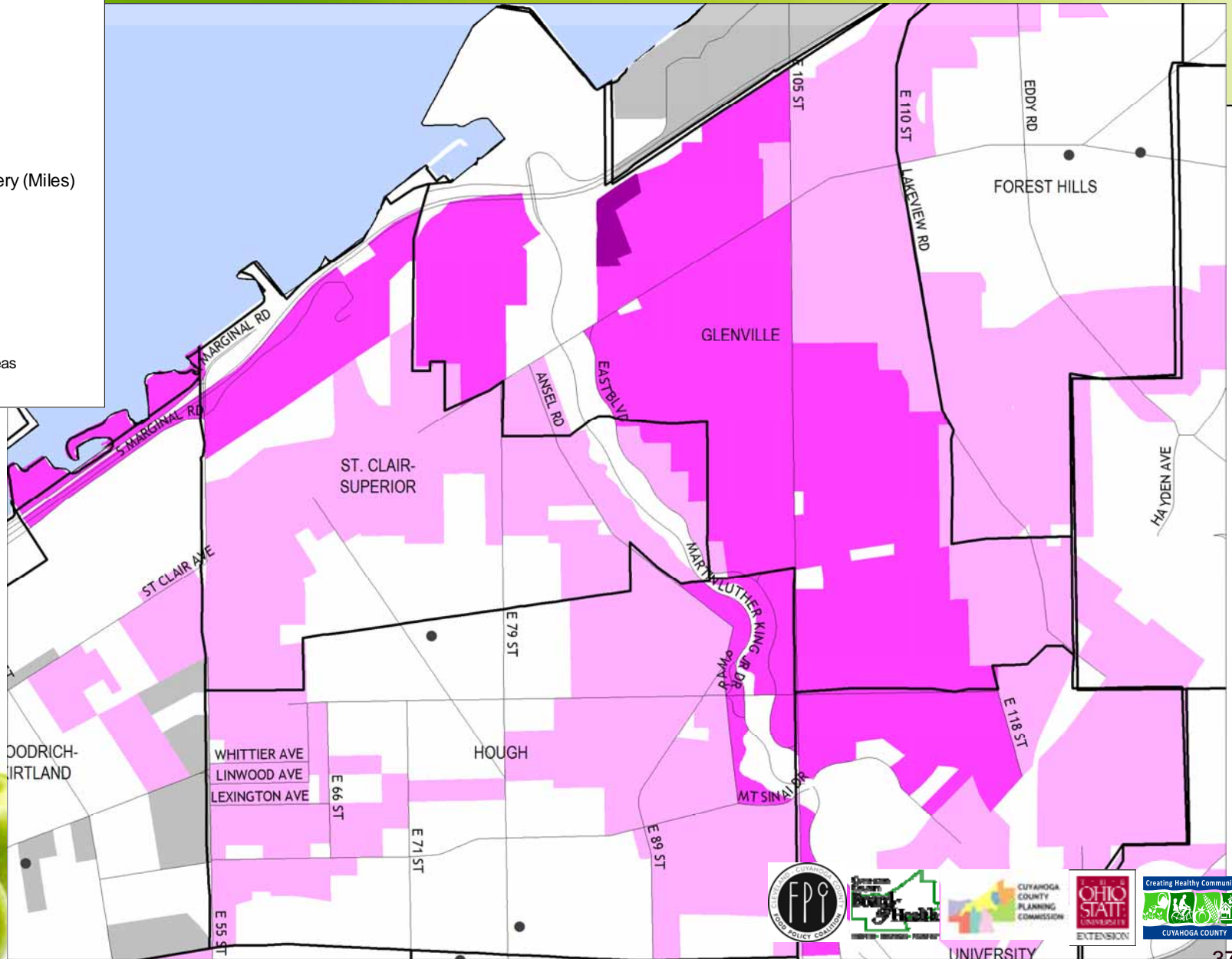
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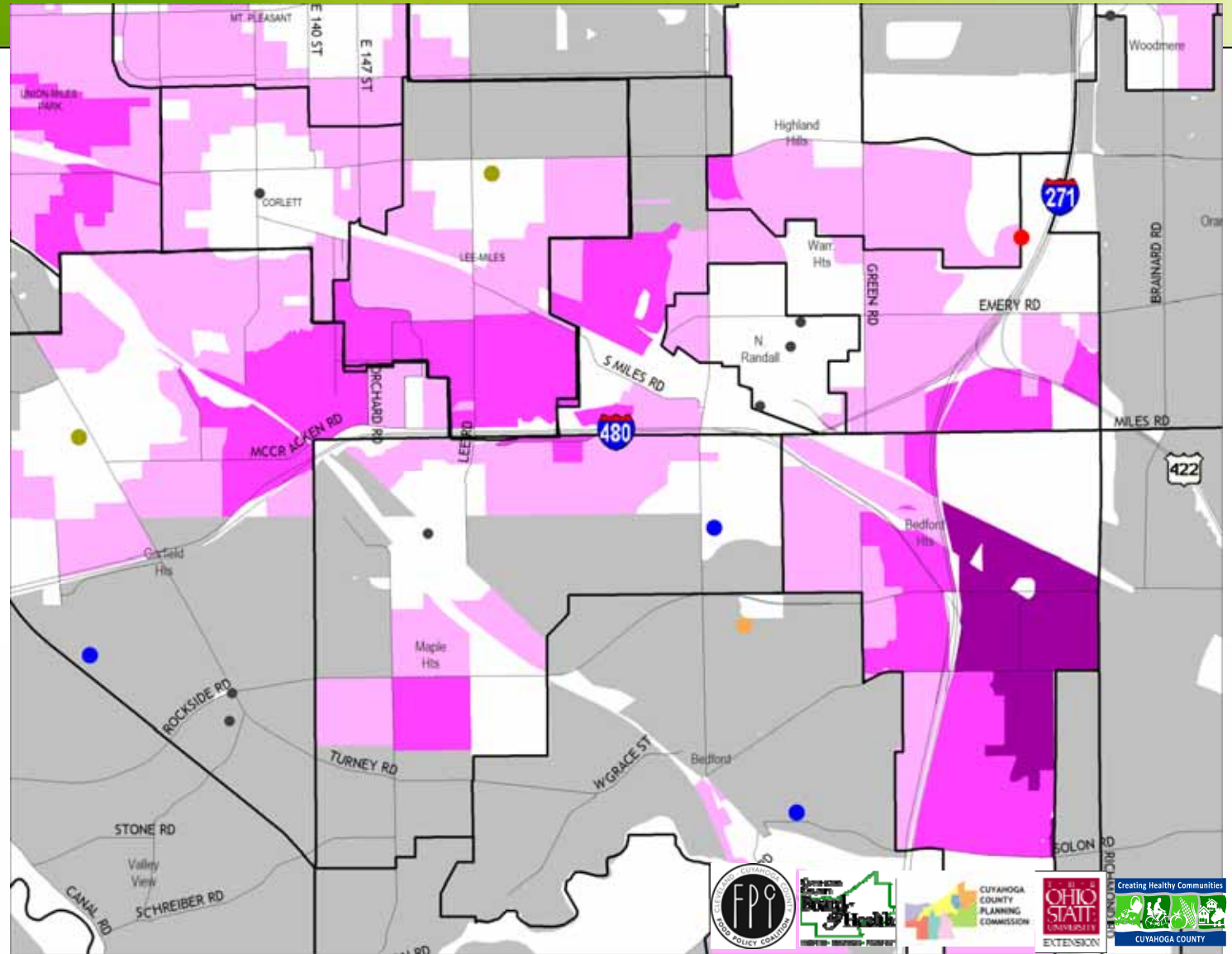
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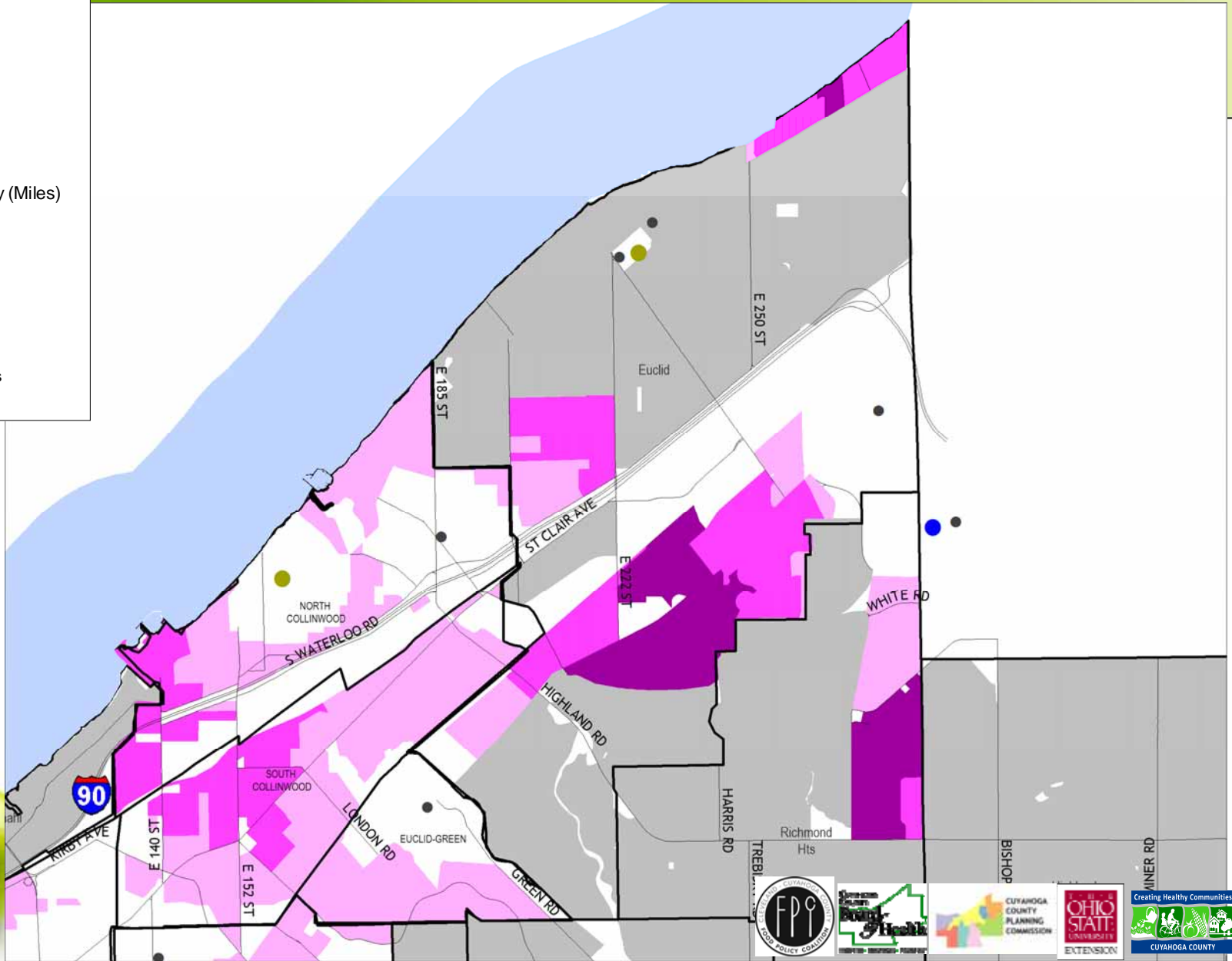
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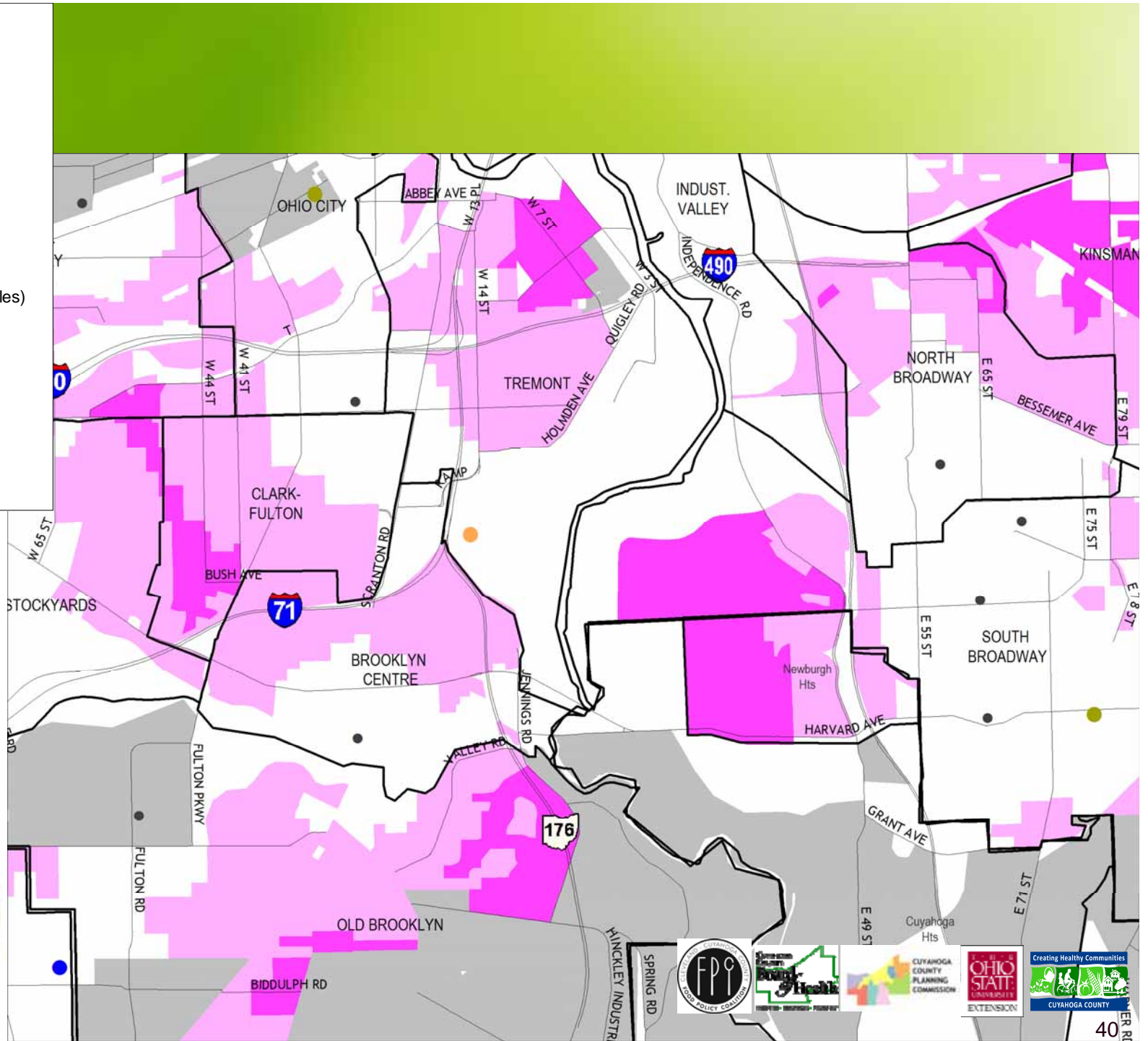
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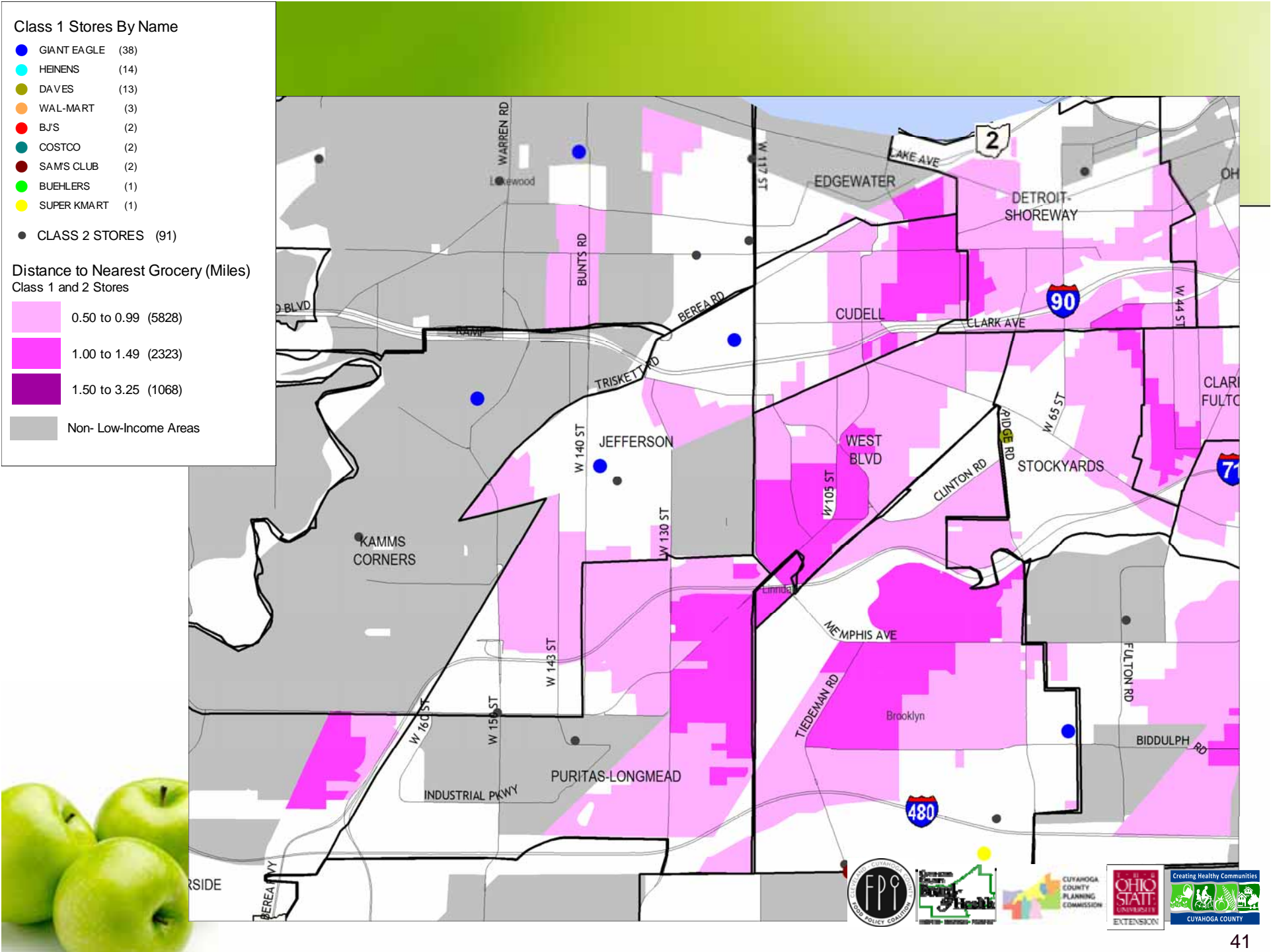
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# Today's Forum

Discuss potential for new full service grocery store development within the Food Desert Areas.

- What does it take?
- What are the obstacles?
- What is needed to overcome the obstacles?

