

Section I. Introduction & Executive Summary

Introduction

The University of California, San Diego (UCSD) retained Economics Research Associates (ERA) to provide analysis and recommendations regarding the provision of retail services on campus to serve the retail and food service needs and preferences of students, faculty, staff, and visitors. This comprehensive Retail Services Study provides a strategy by which UCSD can plan for future services, create synergy between retail uses, or use retail and food service to reinforce the University's sense of community. The Social & Behavioral Research Institute (SBRI) at California State University San Marcos assisted ERA by conducting a web-based survey of students, staff and faculty spending patterns and retail preferences.

Current Retail Space Performance

UCSD has identified more than 230,500 assignable square feet (ASF)¹ of retail and commercial services space on campus. Based upon a review of the individual establishments, ERA has identified approximately 161,000 square feet of this space as retail, food service and personal services spaces. The analysis focuses on these types of uses as retail space.

During the 2001-02 academic year, on-campus retail sales per assignable square foot ranged from \$300 at numerous food service establishments to over \$600 at the UCSD Bookstore. The UCSD Bookstore estimates even higher sales for the 2002-03 school year due to growing Internet sales and a successful campaign to promote computer sales to entering students. These figures reflect a very healthy sales performance, especially considering it is achieved largely over a nine-month academic year. The figures plus survey responses suggest that the campus retail market is under served.

In light of this excess demand, which is being verified by this study, several organizations on campus are planning to add retail and food service space. According to ERA's compilation of current plans, which are continually being refined and revised, the UCSD campus is adding 85,400 ASF of retail and food service space. In ERA's demand analysis, business services such as copy centers, banks and the Post Office, are not incorporated into the demand model. If the Post Office expansion, new bank and copy center planned for University Center are included, the total planned square footage grows to 90,000 ASF. Of this addition, the largest majority or 66,500 ASF is planned for the University Center area; and the largest portion of that expansion is the planned 30,800 ASF addition to the campus bookstore. The Director of the Bookstore is currently developing detailed plans for that expansion based upon the relative success of different merchandise lines within the current store, upon trends in campus bookstores across the country and the information generated by this study.

Focusing the future retail and food service space at the University Center area serves to reinforce this area as the campus "Town Center," a meeting place for faculty, staff and

¹ University terminology that amounts to approximately 70 percent of gross leasable square footage

students. **A successful town center helps build the campus social and intellectual community.**

In addition, as demonstrated by the success of village market places and modern shopping centers, retailing benefits from concentration. The planned additions at the University Center area will greatly increase the concentration or "critical mass" of retailing at this location to the benefit of both consumers and retailers. Campus consumers benefit by being able to satisfy a wider array of shopping needs at one general location and thereby saving valuable time, and campus retailers benefit by having consumers spend a larger percentage of their shopping dollars on campus.

Highlights of Survey Findings

During May of 2003, SBRI conducted a web-based survey of campus population retail preferences and spending patterns. Separate samples were drawn from the faculty, staff, graduate student and undergraduate student populations at UCSD. Those individuals selected in the samples were sent e-mail messages inviting them to participate in the web survey. A total of 2,178 surveys were conducted across the four sample groups, including 230 faculty, 255 staff and 1,693 students. The student samples were also designed so that the undergraduate student sample reflected appropriate proportions of students within the various undergraduate colleges, while the graduate student sample reflected appropriate proportions of students within the Medical School and the Scripps Institution of Oceanography, vs. other graduate programs. Both student samples were designed to reflect the appropriate proportions of students living on- versus off-campus. The survey provided expenditure patterns by population, which served as key inputs into the demand analysis. The important survey findings are as follows:

The University population generally supports more retail services.

The strong retail core concept best serves the undergraduate student population, off-campus student, and a large share of other groups. The decentralized retail services concept tends to be favored by the faculty and staff.

A mixed strategy of a strong retail core combined with selected retail services that are decentralized and located in the colleges and certain institutions (e.g. Scripps and School of Medicine) is the preferred approach.

Chain outlets are desired by undergraduate students but are less desired by others.

Focus Group Feedback

ERA also conducted focus group sessions with undergraduates from each college, graduate students, and the deans of five of the six colleges. Overall, most students in the focus groups stated that they were reasonably satisfied with on campus retail and food offerings; however, there was a set of concerns. The recurring and virtually unanimous concerns were high prices, lack of late hours of operation, lack of groceries and sundry items, and boredom with existing options. The planned retail expansion, which will include selected late night venues, will address these concerns.

Existing and Future Retail Demand

The current total University population is approximately 33,100. When UCSD reaches its planned long-term growth in 15 to 20 years, the projected population will reach 48,900. This nearly 50 percent campus growth, combined with the current under supply of retail and food service space, drives the need for additional retail development on campus.

In determining the amount of retail and food service space needed on campus, ERA designed a spreadsheet based demand model that incorporated: 1) The population growth forecast by location on campus, 2) Student enrollment growth by college and by on- versus off-campus residency, 3) Spending per capita by major retail category for students and faculty/staff in accordance to our survey results, and 4) The current retail space and dollar volume by establishment at various campus locations.

Based upon a comparison of the existing supply of space to current and future demand, as shown in Table I-1, the UCSD campus needs an additional 56,000 assignable square feet of space immediately, and this space shortfall grows to 113,000 ASF by approximately 2010. In this analysis, ERA assumed that the midpoint between the current enrollment level and the long-term enrollment forecast would be reached in 2010. The planned expansion of 85,400 ASF will largely satisfy both the current shortfall and much of the projected demand growth to 2010. The remaining demand by 2010 is largely at East Campus (9,100 ASF), Sixth College (6,300 ASF) and Birch Aquarium (4,200 ASF) assuming a rebound of visitor growth as the economy recovers.

Table I-1
**Summary of Additional Retail Space Needed on
 Campus at 2002, 2010, and 2020**

(Assignable Square Feet)

	Fall 2002	Fall 2010	Fall 2020
University Center			
Demand for Space	105,129	132,538	151,880
Current Supply	69,412	69,412	69,412
Cumulative Planned Additions	0	59,685	59,685
Additional Space Needed	35,717	3,441	22,783
Warren College			
Demand for Space	9,870	9,141	9,013
Current Supply	17,556	17,556	17,556
Cumulative Planned Additions	0	0	0
Additional Space Needed	0	0	0

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(Assignable Square Feet)

	Fall 2002	Fall 2010	Fall 2020
Muir College			
Demand for Space	7,457	8,144	8,109
Current Supply	20,254	20,254	20,254
Cumulative Planned Additions	0	0	0
Additional Space Needed	0	0	0
Revelle College			
Demand for Space	7,300	8,043	8,020
Current Supply	30,837	30,837	30,837
Cumulative Planned Additions	0	0	0
Additional Space Needed	0	0	0
Roosevelt College			
Demand for Space	6,590	8,451	13,982
Current Supply	0	0	0
Cumulative Planned Additions @ ERC	0	11,700	11,700
Additional Space Needed	6,590	0	2,282
Marshall College			
Demand for Space	8,081	11,475	11,439
Current Supply	9,035	9,035	9,035
Cumulative Planned Additions	0	0	0
Additional Space Needed	0	2,440	2,404
Sixth College			
Demand for Space	1,388	8,145	8,908
Current Supply	1,860	1,860	1,860
Cumulative Planned Additions	0	0	0
Additional Space Needed	0	6,285	7,048
North Campus/RIMAC II			
Demand for Space	3,993	5,495	6,453
Current Supply	0	0	0
Cumulative Planned Additions	0	6,800	6,800
Additional Space Needed	3,993	0	0

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(Assignable Square Feet)

	Fall 2002	Fall 2010	Fall 2020
Birch Aquarium			
Demand for Space	5,554	5,932	6,311
Supply of Space	2,267	1,767	1,767
Cumulative Planned Additions	0	0	0
Additional Space Needed	3,287	4,165	4,544
SIO other than Birch			
Demand for Space	1,398	1,789	2,173
Supply of Space	618	243	243
Cumulative Planned Additions	0	1,200	1,200
Additional Space Needed	780	346	730
Torrey Pines North & South			
Demand for Space	574	574	574
Supply of Space	465	465	465
Cumulative Planned Additions	0	0	0
Additional Space Needed	109	109	109
East Campus: Health Sciences & Cancer Center			
Demand for Space	10,160	17,928	25,415
Supply of Space	9,135	9,135	9,135
Cumulative Planned Additions	0	2,400	2,400
- Additional Space Needed ¹	5,809	9,086	13,880
Total UCSD Campus			
Total Demand for Space	167,494	217,656	252,279
Total Supply of Space	161,439	160,564	160,564
Cumulative Planned Additions ²	0	85,385	85,385
Total Additional Space Needed After	56,285	25,873	

¹The type of space demanded does not match all of the type supplied; therefore, the estimate of Additional Space Needed exceeds the difference between demand and existing supply.

²Includes the cafe at the La Jolla Playhouse and Education Center.

³Some current supply is not located where it's needed or is surplus in its sub-area and is not counted against demand. Therefore, Total Additional Space Needed (a sum of Additional Space Needed in each sub-area) is greater than the difference of Total Demand for Space less (Total Supply of Space plus Planned Additions) for the campus as a whole.

Source: Economics Research Associates.

When the University reaches its long-term enrollment forecast, which ERA has assumed to be the year 2020, the campus retail demand will exceed existing and currently planned supply by 53,800 ASF. About 42 percent of this projected shortfall will be in the University Center area. While the University should incorporate this next level of retail expansion into its campus master planning decisions, the specific development of additional retail space beyond the projected 2010 demand should await three considerations:

- The actual enrollment growth of the campus.
- The success of the overall campus retail environment a few years after the currently planned expansions have been completed as measured by consumer satisfaction, financial performance and enhancement of the campus community.
- The retail impact of the campus light rail connection to La Jolla Village Center and University Town Center are better understood.

The details of the additional space needs to 2010 as compared the currently planned expansion are discussed by specific area below:

- The University Center/Student Center area could support an additional 35,700 ASF immediately and this excess demand grows to 63,100 ASF by 2010. The planned expansions at the Price Center and Student Center will add 59,700 ASF of retail and food service space, and this expansion should satisfy most of the projected demand until 2010.
- Three of the older colleges have more than sufficient retail and food service space. They are Warren, Muir and Revelle Colleges, and no additional space should be added at these colleges.

This fall, Roosevelt College (ERC) recently opened 11,700 ASF of new space as part of the campus' North Campus development. According to ERA's demand model, ERC will need 8,500 ASF by 2010 and 14,000 ASF when it is fully occupied. Thus the recently opened retail space in the North Campus development should satisfy demand several years after 2010, but may need slightly more space, 2,300 ASF, by 2020.

- Marshall College should add 2,400 ASF, and Sixth College should add 7,000 ASF by 2020.
- RIMAC is planning a 4,500 ASF sport cafe and convenience store. This is sized correctly for current demand, but the demand at RIMAC II will increase to 5,500 ASF by 2010 and 6,500 ASF by 2020. The planned School of Management is also planning a 2,300 ASF cafe as part of its new North Campus facility. The RIMAC, School of Management, and Roosevelt Colleges' retail space together should be sufficient to service projected demand for the North Campus area.

Torrey Pines North and South generate effective demand for approximately 550 or 600 ASF. It currently has a Cups Cafe of 465 ASF. The additional North Campus food

service and retail development at ERC and RIMAC II may be able to provide some additional service to the population at Torrey Pines, which enjoys very limited food service options.

- Assuming that the current temporary food service facility is replaced, Birch Aquarium needs a permanent 1,800 square foot cafe and 2,700 square feet of additional book/gift store space. This conclusion assumes that visitor attendance at Birch Aquarium will grow from the current level of 220,000 per year to 250,000.
- The Scripps campus should be able to support a new permanent restaurant/cafe of 1,500 ASF, and this cafe would replace Snackropolis. Current plans for the Scripps Conference Center include a cafe and catering facility of 1,200 ASF.
- The East Campus, which includes the Health Sciences Neighborhood, the Science Research Park and future site of Extended Studies will need approximately 14,000 additional square feet at build-out.

Much of this additional space is for an expanded pharmacy, gift shop and eye center. The cafe planned for the Cancer Center was taken

into consideration in this analysis.

The campus has two intrinsically conflicting goals that it must try to balance. One is to promote profitable retail operations that allow those operations to be financially self-sustaining. The other is to offer value and quality services to the campus population. The development of additional retail space, using the above demand forecasts as guidelines, is designed to serve that balance. This market research also provides the campus with greater confidence in the success of its investments in commercial services.

As proven by the success of large shopping centers developed over the past half century, retail performance is enhanced by concentration. This is because it saves the consumer time in being able to purchase all desired merchandise in a single trip. Other than the basic food services essential to the residential population at the colleges, retail outlet will tend to have stronger sales if concentrated in a sufficient critical mass. Because retailing benefits from critical mass, retail development is often "lumpy." When a major increment of retail is first built, certain campus outlets may experience some dilution in sales performance. However, that dilution will be offset by demand growth and greater market penetration due to an increase in the concentration of goods and services. The strategic recommendations recognize these aspects of retailing.

Strategic Recommendations

The survey results, demand analysis and performance review leads to a number of recommendations, reflecting five principles:

1. Expand the core as the campus' town center, with unique sub-districts to ensure a critical mass of consumers to attract commercial tenants, create alternative environments for different consumer preferences, and coordinate with consumer circulation patterns and improve convenience.

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2. **Ensure that each college has sufficient food service space to accommodate its resident and non-resident students to service the growing university community, enhance convenience, and provide food and price choices.**
3. **Plan for each major subdistrict away from the University Center, namely North Campus and East Campus, to have a convenient food service center with some retail to serve the needs of populations for which the campus core is not practical.**
4. **Provide low-cost convenience facilities like carts and vending machines in more isolated areas of campus to serve populations, such as researchers, that need services but are not numerous enough to warrant capital investment in permanent facilities.**
5. **Link the campus hierarchy of retail outlets and services so that a coherent network is provided that serves the multiple sub-communities within the university population, the various retail and service needs throughout the week for individual consumers, and the different geographic districts on campus.**

The measures of success are similar for all principles - maintenance or an increase in sales per capita as the university population grows; maintenance or increases in sales per square foot of retail space, or food cart, or vending machine; and consumer satisfaction.

The retail strategy should guide all planning activities by reinforcing the campus core as the campus "Town Center," while providing selected services to the college neighborhoods. The Town Center services an important function by allowing the campus to utilize its commercial activities to strengthen the university as a social and intellectual community. This approach is analogous to the hierarchy of retail functions in the larger market place. The campus core commercial outlets serve as UCSD's "downtown or regional center", offering greater variety of operators, larger operators, better prices, more unique specialized outlets, entertainment, and environments that bring together disparate populations.

The college food service spaces provide for the daily nourishment needs of the students and reinforce the colleges as communities. In addition to the Town Center and the individual colleges, considering walking distances and barriers, UCSD has only two effective opportunities to create "neighborhood centers," offering daily food, convenience sundries, and local gathering places. One such opportunity is at North Campus, where the retail developments at ERC might be designed to form such a neighborhood center by including some retail space near ERC Commons as future North Campus housing is developed.

ERA's recommendations are presented by geographic area below.

Main Campus

The University Center area, consisting of the Price Center and the Student Center, constitute UCSD's Town Center. This area does not have sufficient quantity or variety of retail and dining to effectively satisfy current or future demand. UCSD students recently voted in favor of increase student fees to expand the Price Center.

With confidence enhanced by the student vote, UCSD is now planning a major expansion for the Price Center and some minor expansion of retailing at the Student Center.

This expansion will address the current deficiency and accommodate the projected demand growth to approximately 2010, depending upon the actual pace of enrollment growth. The mix appears well targeted to the market need. Approximately 23,000 ASF of space will be needed by 2020.

The UCSD Bookstore Director has detailed operating information on performance by department and trends across a large number of university bookstores. He is in a good position to decide on how the additional space in the expanded bookstore should be allocated. Based upon the demand analysis, ERA believes the following sectors would likely have success: 1) Better designed UCSD logo products, 2) Affordable brand name clothing including underwear without a UCSD logo, 3) Limited household furnishings and sundries, 4) Gift cards, 5) Photo processing, and 6) Books and music for leisure.

Table I-2
Planned Additional Retail Space UCSD University Center

	Units	ASF
Bookstore Expansion	1	30,785
Price Center Food Service & Seating	5	12,500
Price Center Grocery Store	1	3,500
Price Center Hair Stylist	1	1,000
Price Center Other Retail	1	1,000
Price Center Porter's Pub Expansion	1	1,850
Price Center New Japanese Restaurant	1	1,500
Price Center Food Coop Expansion	1	1,000
Student Center Grove Caf6 Expansion	1	750
Student Center General Store Expansion	1	2,500
Student Academic Services Facility - Cafes	1	1,500
Faculty Dining Expansion	1	1,800
Subtotal Retail/Food Service	17	59,685
Price Center Post Office	1	1,000
Price Center Bank Expansion	1	1,000
Student Academic Services - Imprints	1	2,500
Subtotal University Center Bus Services		4,500
Subtotal University Center Expansion		66,485

Source: UCSD.

The University Bookstore could also offer a website that serves as a portal to major chain retailers' on-line retail offerings (e.g. Gap, Old Navy, Pier One, Ikea and Wal-Mart). The purchases would be shipped to DOC3 inside the bookstore for pickup by the customers.

Consistent with the broader retail trend, there is growing interest on campus for "ready to eat" meals that can be purchased at the grocery store or from other food vendors. These ready to eat meals save preparation time, and students in focus group sessions have indicated time to be a precious commodity. The new grocery store planned to be part of the Price Center expansion should experiment with a wide variety of take home meals, ranging from salads, sandwiches, roasted meats and even sushi. The new restaurants, cafes and other food vendors should also offer takeout meals.

One of the major issues for the campus is the lack of outlets with late night hours. We understand that some of the venues planned for the University Center will have much later operating hours.

To improve the entertainment venues on campus, UCSD should explore ways to improve the competitiveness of the movie theater, possibly with increased viewing hours, greater variety of films, more contemporary seating and/or an improved sound system. The theater can anchor a campus recreation center with activities suggested by students in the survey and focus groups, such as bowling, billiards, dance, live music, etc., combined with eating and drinking outlets. The feasibility of such a specific center would have to be assessed, but most likely would operate as a student service rather than as a profitable commercial enterprise.

The core area should experiment with organizing a regular Friday afternoon farmers' market at a designated location, and promote the market to the University community and the surrounding public. Convenient and free parking for the off campus population will be absolutely essential, if this market is to attract any interest from the general population.

UCSD will need to retain a retail architect to evaluate alternative physical configurations for the central campus retail expansion. ERA has a few suggestions that should be considered by the selected architect.

Create distinguished districts within the campus core area, such as having the Price Center anchor an active campus town center, while maintaining the Student Center as a more tranquil and passive alternative.

- Open up retail outlets and centers to the existing and future "walking streets", such as Library Walk, Lyman Lane, and/or Matthews Lane or the planned Rupertus Way. All of these locations are generally within walking distance parameters, (one-quarter mile) of the core campus classroom and office concentrations. Lyman Lane and Matthews Lane are closer to the Price Center, the Library, and Warren College. Rupertus Way is closer to the Gilman Parking Structure, Sixth College, and the possible future trolley station. From strictly a retail perspective, it is better to build upon existing retail concentrations in the core when adding future phases of newly constructed retail space, using the existing retail center as an anchor to a new sub-district to build critical mass. Creating and establishing a new separated district is possible, but more risky. However, UCSD has other objectives that are not related to retail priorities when

deciding where to locate new retail sub-districts within the core that it must take into account.

- The University should estimate anticipated pedestrian-circulation counts, on average and at peak times, on campus to identify the best opportunities. The retail outlets that face the popular corridors would benefit from the exposure and the convenience to potential customers. Care should be taken, however, not to place outlets that generate cues or congestion outside the store premises, so as not to interrupt the campus circulation system. Possible cueing should occur within the commercial area's boundaries, or infrequently spill over to the common circulation corridors only during non peak hours when there is sufficient capacity. These relationships will have to be evaluated on a case-by-case basis.
- Popular entries and exits from campus, such as near parking lots and garages, shuttle stops, and future transit stations are also opportunities to provide convenience services, but the scale of retail must be consistent with the amount of consumers passing by during the day. Food carts, ATM's, or dry-cleaning services are examples.. These services typically need exposure to more consumers than just the peak hour rush generated as people go to or from their cars. It is better to provide these services at visible public locations enroute to the garages or transit centers, such as the planned Rupertus Way, rather than within a garage facility.
- Take advantage of the core's locations that are most exposed to pedestrian traffic, the 100 percent corners, by placing outlets that benefit from impulse purchases at these corners. (The 100 percent corner is where two of the highest volume pedestrian paths intersect. Since retail is a "support" function to the higher function of education at a university, retail success and convenience needs to be weighed against other campus needs for this 100 percent corner.)

Create a one to two-block Main Street with commercial services at the street level and perhaps office, classroom, or limited housing at upper levels. The eventual redevelopment of the University Administrative Complex may provide an opportunity to create this district on Lyman Lane across from the Price Center.

Consider the creation of an external plaza and cafe environment at the western terminus of Matthews Lane, where shuttle passengers are dropped off, by placing a cafe and outdoor eating spaces (in conjunction with the Price Center expansion) that complement the outdoor cafe by Cafe Roma at the existing Price Center, and design the plaza area as a special public environment.

- Strengthen the pedestrian axis, circulation, and "way-finding" through the existing Price Center.
- Consider the creation of a convenience outlet that serves take-out and packaged prepared food at the planned Marketplace Plaza on Rupertus Way. Demand could first be tested with a food cart outlet, followed by developed space if demand volume warrants the investment.

- **Designate an outdoor space for special event retailing, such as a regular farmers' market, perhaps at Marketplace Plaza on the planned Rupertus Way.**

Provide an outdoor area at the Price Center that offers a more tranquil environment that is away from the music and rallies.

College Retail Strategy

The older colleges of Warren, Muir and Revelle have more than ample food service space and are not able to support additional space. However, Roosevelt, Sixth and Marshall colleges need to add retail and food service space to service their expanding populations. Anticipated expansion of Marshall's on-campus student population will replace demand for existing space at Marshall that ERC students previously supported prior to completion of the ERC facility. Additional growth at Marshall will warrant even more space. In building new food service spaces for these colleges at the North Campus and at RIMAC, the University should consider two alternative strategies:

Each college adds its own food service and retail space to reinforce the concept of the college as a community. This would be a continuation of the current thinking.

- **Build a single food service and retail complex at North Campus in phases to keep pace with the growth at these colleges. This complex could also be sited at a location that serves RIMAC as well. The North Campus population would benefit from the greater variety available from the larger concentration of food service and retail venues. The University may be able to use its resources more effectively by reducing the amount of underutilized space built in anticipation of enrollment growth at the individual colleges.**

If the North Campus built one complex, it may be able to support a convenience retail outlet that serves sundries and snacks (including more fresh fruit and health-food items). The complex could serve as an outlet for distributing merchandise from some of the campus core outlets, such as ice cream and DVD/video rentals, dry-cleaning pickup, and selected merchandise ordered over the Internet.

If each college builds its own food service space, such facilities should be located near the inner-edge of the campus, rather than the outer edge, to facilitate access to consumers from classrooms and other colleges. To encourage students to venture out to different dining halls, each dining hall could establish cuisine specialties on a regular and predictable basis, so that each dining hall develops a campus-wide reputation.

Scripps Institution of Oceanography (SIO)

The graduate students, faculty, staff and researchers at Scripps currently have very limited food service options. There is the dated Snackropolis, which offers a limited variety of lunch items; and the Cups Cafe, which offers food cart items. The Birch Aquarium also has an outdoor food cart type service primarily oriented to visitors.

A new conference center is planned for Scripps, and the second level of this conference center has a deck area suitable for the development of a cafe or restaurant. The retail

analysis, which is based upon demand from local SID and nearby Federal employees, indicated that a restaurant/cafe of 1,500 square feet is supportable at this location, particularly since it enjoys a panoramic view of the Pacific Ocean. This cafe will be designed to have a catering kitchen to serve events at the conference center. It could also attract walk-in patrons from the beach. If successful, this cafe would likely displace Snackropolis. The Cups Cafe, because of its convenience to certain buildings at SIO, could be maintained and would likely shift its concentration to coffee and snacks. One of the issues in the development of this cafe is the appropriate alignment of investment risk with operating return. It is also an area of opportunity for a public/private venture.

The Birch Aquarium has recently experienced successive years of declining attendance, probably reflecting the condition of the regional economy. If this attendance decline is reversed and the number of annual visitors increased from 220,000 per year currently back up to around 250,000, then a modest expansion (2,700 ASF) of the book/gift store and replacement of the food cart with a permanent cafe (1,800 ASF) would be appropriate.

East Campus

East Campus was planned and developed in a campus-style with major buildings fronting on pedestrian walkways set back from the street. Parking is on the perimeter of the buildings. This suburban development pattern could make the creation of a pedestrian scale retail village fairly difficult without a significant reinvestment in traffic and pedestrian circulation patterns. In addition, deed restrictions limiting Science Research Park land use to "scientific, industrial and technological research" would not permit retail commercial uses.

The Science Research Park planned for the East Campus is intended to have only four or five major users, and their arrivals are likely to be spaced over a number of years. The current University thinking is for each major user to have its own food service and limited retail facilities.

In terms of the other East Campus retail, ERA recommends that the eye center, gift shop and pharmacy in the Health Sciences building be expanded or similar facilities be located in the Cancer Center for three reasons:

- They are currently experiencing phenomenal sales per square foot performance.
- The number of staff or researchers on the East Campus will grow fairly rapidly.
- The number of visitors or patients visiting the East Campus will also grow as more facilities, like the Cancer Center, are completed.

With a 6,900 square foot dining facility in the Health Sciences Center and another 2,400 square foot cafe planned for the Cancer Center, the food service component for the East Campus may be adequate.

Campus Wide Initiatives

In addition to district specific recommendations, ERA also recommends the following for campus wide consideration:

- To better serve the campus population, UCSD should develop and maintain a web site that informs students, faculty, and staff of operating hours, locations, specialties, special events, and promotions for campus retail and food service facilities. The web site can also offer links to on-campus and off-campus retail, food, and service outlets, and be a conduit for ordering selected products and services, with delivery and pickup at DOC3 counters in the UCSD Bookstore and possibly elsewhere.
- There also appears to be a need for the University to have more vending machines placed in remote yet active after-hour locations, such as labs. Carts and vending machines enhance convenience at more remote classroom, office, and research locations, at low capital costs. Coffee/food carts should be placed in locations with the greatest pedestrian *traffic*. Given their low capital costs, it is easy to experiment with locations to generate sufficient sales. Supply will respond to demand, particularly if the carts are provided as private concessions. Those areas that do not provide enough demand to sustain a cart should be served by vending machines.

Implementation

The process of implementing the Retail Services Study for the UCSD campus will require selected changes in the current approach toward management, as well as adoption of some new policies and practices. ERA's key implementation recommendations are presented below:

- *Incorporate Selected Retail Recommendations into other University Plans*

If the Retail Services Study is to succeed, recommendations regarding the amount, orientation, and placement of retail space should be incorporated into appropriate project plans. Retail proposals should be reviewed for consistency with this plan and require a finding of consistency if approved.

- *Create a Retail and Commercial Advisory Committee*

Organization

Four campus organizations have administrative responsibility for the development and management of retail, dining, entertainment, and social functions and associated facilities for UCSD:

- D *University Bookstores*
- Housing and Dining Services*
- University Centers*
- Real Estate Development*

While these organizations maintain operational responsibility for retail activities at UCSD, the Committee will focus its advice on long-term planning and policy for the development of retail activities.

Charge

The charge to this committee is to advise the Vice Chancellors - Business Affairs, Resource Management & Planning, and Student Affairs on retail and commercial activities to serve the students, faculty, and staff on UCSD's campus in La Jolla. In discharging its responsibilities, the Committee will be guided by the following goals:

Improve the campus life experience, particularly for students, by ensuring a sufficient mix and distribution of food and retail services while enhancing the development of gathering places that provide both service and a high quality environment in which to interact.

Develop the University Center neighborhood and immediate environs as the campus "town center" in a way that ensures a critical mass of visitors, pedestrians, and patrons the availability of a broad array of reasonably priced retail products and services, creates alternative environments for different consumer preference, and coordinates with campus circulation patterns.

Ensure that major sub-districts of the campus (West Campus, East Campus, SIO, etc.) away from the campus core have access to needed retail services that can be economically sustained by the sub-district consumer population.

Achieve for campus constituents, particularly students, the best mix and distribution of food and retail services, convenience, variety, lower prices, and retail operational and financial viability.

This committee will perform the following specific functions:

Review all proposals for new retail activities (including those suggested for inclusion in new buildings) and advise on appropriateness, financial viability, location (or adjacency) issues, and congruence with the study as the Campus evolves. The study should be seen as providing general direction, whose details and specifics may become less important over time.

For existing retail and commercial space:

- **Review proposed major expansions of operation or facility, or change in use or tenant for congruence with Study and financial viability.**

For stand alone pads (ATMS, coffee carts, etc.):

- **Review proposed sites for congruence with Study;**

Review for potential negative impacts of existing retail operations resulting from new adjacencies.

Identify opportunities for new retail activities, and make recommendations for campus retail tenant mix.

Receive reports on retail development in the surrounding retail community and the potential impacts on the campus' retail activities.

Monitor retail industry trends in services and business terms.

The membership of this administrative committee will include representatives from:

Academic Senate (CCCE) (1 member)
Business Affairs (1 member)
Resource Management & Planning (1 member)
Student Affairs (1 member)
Undergraduate Students (2 members)
Graduate and Professional Students (1 member)

Primary Consultants to the Committee are:

Director, University Bookstores
Director, Housing & Dining Services
Director, University Centers

Committee members will serve two-year terms with the exception of students who will serve one-year terms. Staff from Real Estate Development and Campus Planning will provide primary assistance to the committee, which will be chaired by the Director of Real Estate Development. The Committee will draw upon staff from other offices as necessary for expertise and advice.

Establish Practices That Address System-Wide Concerns and Policies

The strategy developed for UCSD is specific to the campus and context in La Jolla/San Diego area. However, it should also be recognized that the principles, practices and policies that are implemented are also subject to University of California system-wide consideration. The extent to which the UCSD strategy may establish precedents or be exceptional circumstances from other campuses should be weighed and 'vetted' by the required authorities prior to adoption of the strategy or administrative enforcement.