

**CENTRAL BUSINESS DISTRICT  
NEEDS ANALYSIS  
BISMARCK, NORTH DAKOTA**

**Prepared For:**

**City of Bismarck  
Bismarck, North Dakota**



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September 25, 1980

Mr. W.C. Wocken  
Planning Director  
City of Bismarck  
Bismarck, North Dakota 58501

Gentlemen:

Enclosed is our Needs Analysis of the Bismarck Central Business District as per our assignment with the City of Bismarck.

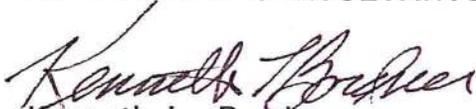
The study includes a detailed analysis of the Central Business District as well as an examination of the area and those economic factors which influence the future development potential of the CBD. Included in the report is information intended as an orientation for the reader who may not be familiar with the Bismarck Area. It has been our experience that studies such as this, although prepared for the City, will achieve a wide geographic distribution through various development efforts by the city and concerned community leaders. We have prepared maps and illustrated aerial photographs which accompany our analysis.

Also included in this report are recommendations which address development potential and other specific concerns. These recommendations are intended as a basis upon which the community can establish priorities and methods for the continued development of the Bismarck CBD. Our recommendations are intended as guidelines by which the public and private community can initiate action to implement these recommendations.

We have enjoyed our association with the many local groups and individuals who have contributed to this study and look forward to providing assistance to you in the future.

Yours truly,

K. BORDNER CONSULTANTS

  
Kenneth L. Bordner  
President

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## PART ONE - PURPOSE AND SCOPE

The objective of this study is to determine the needs of the Bismarck Central Business District (CBD) for retail, office, hotel/motel and restaurant development. The study contains an examination of existing facilities and an evaluation of the market opportunity for both current and future development.

Elements of the market analysis include trade area demographics, CBD occupancy, retail, office and other commercial competition, as well as transportation patterns and retail sales data. The preceding information serves as the basis for estimating the needs of the Bismarck CBD and determining appropriate land uses.

Aerial photographs, maps and tables are presented throughout the report to assist those individuals interested in the CBD with making the decisions for planning and development of the area. The report has been organized into the following sections:

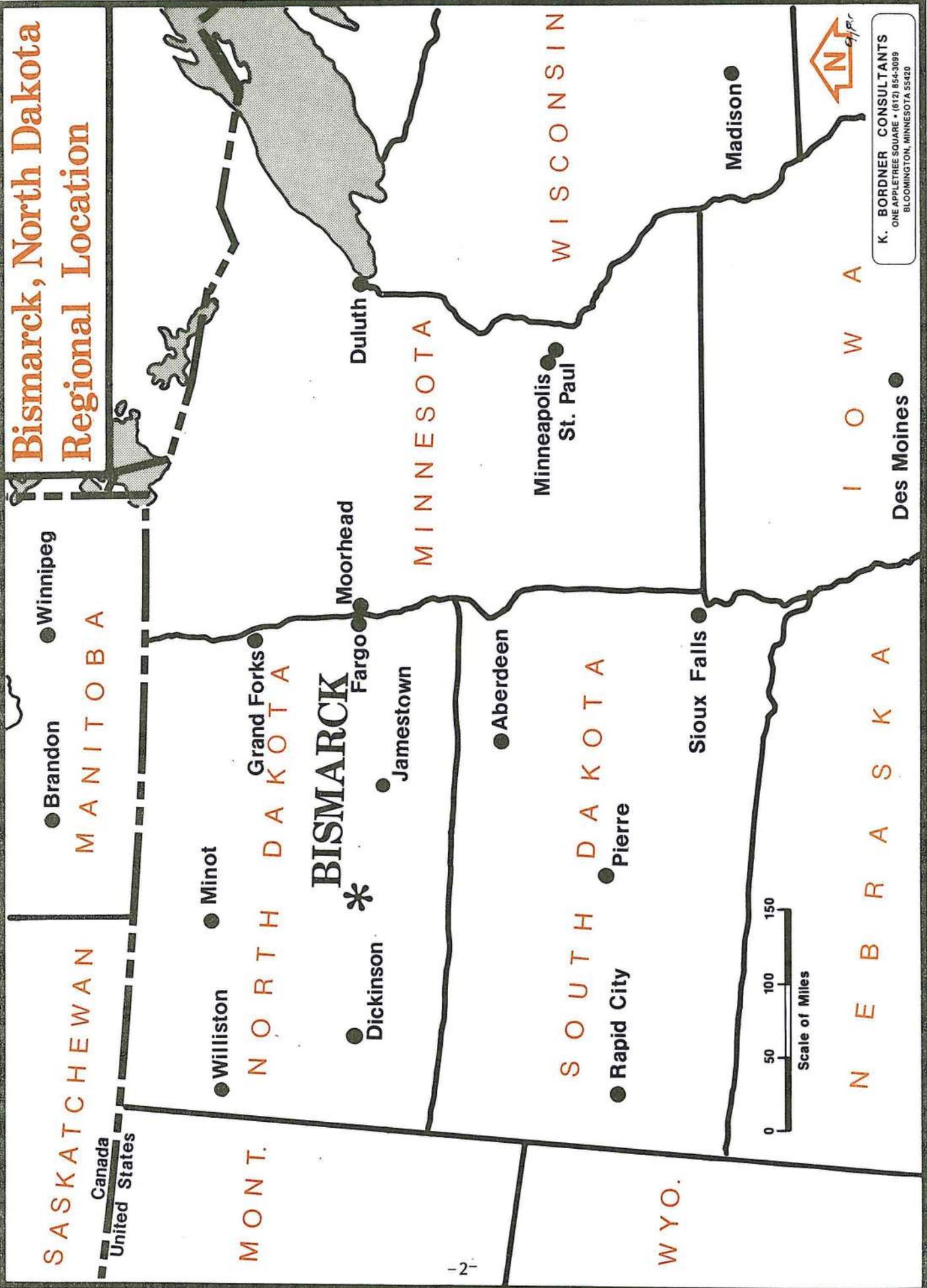
- o Orientation
- o Growth Trends
- o Economic Profile
- o Major Industry Sectors
- o Central Business District Description
- o Existing Central Business District Inventory
- o Potential Development Feasibility

## PART TWO - ORIENTATION

Bismarck, the capital city of North Dakota, is located in the west-central part of the state, 193 driving miles west of Fargo, 114 miles south of Minot and 418 miles east of Billings. Situated on the Missouri River, Bismarck is served by Interstate Highway 94 (east-west) and U.S. Highway 83 (north-south).



# Bismarck, North Dakota Regional Location



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The City of Mandan is located immediately across the Missouri River to the west of Bismarck (see following photo). The Bismarck-Mandan Standard Metropolitan Statistical Area (SMSA) is composed of Burleigh and Morton Counties. The present population of the cities of Bismarck and Mandan, is 59,825 persons, which comprises 75 percent of the total SMSA.

TABLE I  
1980 AREA POPULATION

	<u>City</u>	<u>County</u>
BURLEIGH COUNTY		54,659
Bismarck	44,480	
MORTON COUNTY		24,934
Mandan	<u>15,345</u>	
TOTALS	59,825	<u>79,593</u>

SOURCE: 1980 U.S. Census of Population, Advance Reports

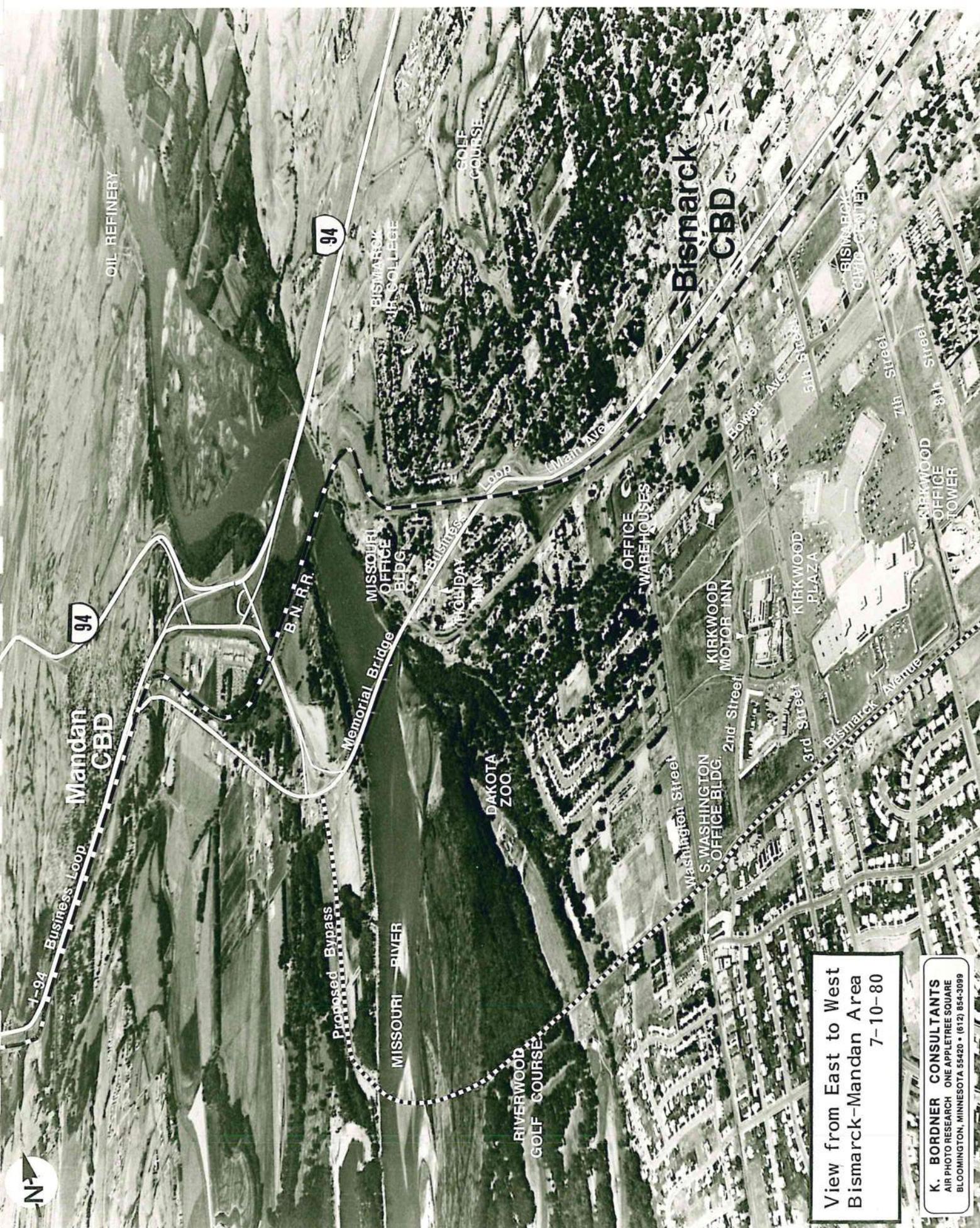
PART THREE - GROWTH TRENDS

TABLE II  
POPULATION

	<u>1960</u>	<u>1970</u>	<u>1980</u>	<u>Percent Increase 1970-80</u>	<u>Annual Compound Rate of Increase 1970-80</u>
Burleigh County	34,016	40,714	54,659	34.2%	3.0%
Bismarck	27,670	34,703	44,480	28.2%	2.5%
Morton County	20,992	20,310	24,934	22.8%	2.1%
Mandan	<u>10,525</u>	<u>11,093</u>	<u>15,345</u>	<u>38.3%</u>	<u>3.3%</u>
Two County Total	55,008	61,024	79,593	30.4%	2.7%
Two City Total	38,195	45,796	59,825	30.6%	2.7%

SOURCE: U.S. Census of Population, 1960, and 1970; 1980 Advance Reports





OIL REFINERY

94

Mandan CBD

Business Loop

1-94

94

B.N.R.R.

Memorial Bridge

Proposed Bypass

MISSOURI RIVER

DAKOTA ZOO

RIVERWOOD GOLF COURSE

MISSOURI OFFICE BLDG

BISMARCK COLLEGE

GOLF COURSE

Business Loop

Main Ave

Bismarck CBD

OFFICE WAREHOUSES

KIRKWOOD MOTOR INN

KIRKWOOD PLAZA

Washington Street

S. WASHINGTON OFFICE BLDG.

2nd Street

3rd Street

Bowen Ave

5th Street

7th Street

8th Street

KIRKWOOD OFFICE TOWER

BISMARCK CITY CENTER

View from East to West  
Bismarck-Mandan Area  
7-10-80

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It should be noted that the 1980 population figures in Table II are preliminary estimates from the 1980 Census of Population and are subject to further adjustment prior to final census data publication. As can be seen from Table II on the preceding page, the combined population of Burleigh-Morton Counties increased by more than 18,000 residents or 30.4 percent, during the period 1970 to 1980. This represents an annual compound growth rate for that period of 2.7 percent. The majority of this increase (13,945 persons) occurred in Burleigh County, which presently accounts for over 69 percent of the two county population.

A complete listing of key economic indicators which reflect population growth and economic activity is included in Appendix A. Summarized below are the gross percentage increases of selected indicators for the period 1970-1980.

TABLE III  
 INCREASE IN SELECTED ECONOMIC INDICATORS  
 BISMARCK, NORTH DAKOTA  
1970-1979

Telephones in Use	102.6%
Electric Meters	47.0%
Water Meters	42.9%
Gas Meters	53.4%
Employment	74.2%
Airport Traffic	238.6%

SOURCE: Bismarck Chamber of Commerce

PART FOUR - ECONOMIC PROFILE

The overall economy of the state and the region has been heavily dependent on agriculture. Bismarck, however, has a basically service-oriented economy. This is attributed to its role as the state's capital city and the Burleigh County seat, as well as a major trade, service, medical and financial center for residents of central and western North Dakota. In addition, current developments in the region are increasing Bismarck's importance as a center for energy-related industries.



## Employment Trends

Total non-farm employment in Bismarck-Mandan increased at a six percent annual compound rate during the period 1970 to 1979, to a total of 29,380 persons. As reflected by Table IV, 71.4 percent of total employment in 1979 was in the categories of Trade, Services and Government. This is a slight decrease from 1970, when the same three categories accounted for 73.6 percent of total employment. The change was due primarily to the rapid increases experienced in Mining and Construction.

TABLE IV  
NON-FARM EMPLOYMENT  
CITIES OF BISMARCK-MANDAN  
1970-1979 Annual Average

	<u>1970</u>	<u>Percent of Total</u>	<u>1979</u>	<u>Percent of Total</u>	<u>Annual Com- pound Increase</u>	<u>Total Percent Increase 1970-1979</u>
TOTAL	17,320	100.0%	29,380	100.0%	6.0%	69.6%
Mining	50	.3%	160	.5%	13.8%	220.0%
Construction	910	5.3%	2,100	7.1%	9.7%	130.8%
Manufacturing	1,370	7.9%	2,330	7.9%	6.0%	70.1%
Trans., Comm., Utilities	1,530	8.8%	2,570	8.7%	5.9%	68.0%
Trade	4,260	24.6%	7,500	25.5%	6.5%	76.1%
Fin., Ins., R.E.	710	4.1%	1,230	4.2%	6.3%	73.2%
Services	4,060	23.4%	6,810	23.2%	5.9%	67.7%
Government	4,430	25.6%	6,680	22.7%	4.7%	50.8%

SOURCE: State of North Dakota Job Service Department  
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## Labor Force

Total employment has increased at an annual rate similar to the increase in non-farm employment. As shown in Table V, total employment increased at a faster rate than the total available labor force contributing to the 1.9 percent decline in the unemployment rate during the period 1972 through 1979.



TABLE V  
LABOR FORCE AND TOTAL EMPLOYMENT  
BURLEIGH-MORTON COUNTIES  
1972-1979 Annual Average

	<u>1972</u>	<u>1979</u>	<u>Annual Compound Increase</u>	<u>Total Increase</u>
Labor Force	27,449	40,773	5.8%	48.5%
Total Employment	25,795	39,100	6.1%	51.6%
Unemployment Rate	6.0%	4.1%		

SOURCE: State of North Dakota Job Service Department  
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Income

For 1978, the Sales and Marketing Management's 1979 Survey of Buying Power reported the median household effective buying income of the Bismarck-Mandan SMSA to be 8.1 percent more than the state average. Present average disposable household income levels in the Bismarck-Mandan SMSA are 13.7 percent more than the state average household income according to the 1980 Editor and Publisher Market Guide.

TABLE VI  
INCOME ESTIMATES

	<u>1980</u>		<u>1978</u>
	<u>Disposable*</u> <u>Income</u> <u>Per Capita</u>	<u>Average*</u> <u>Disposable Income</u> <u>Per Household</u>	<u>Median Household**</u> <u>Effective Buying</u> <u>Income</u>
North Dakota	\$7,360	\$21,260	\$14,224
Bismarck SMSA	8,270	24,174	15,375
Burleigh County	8,310	24,025	16,334
Morton County	8,190	24,510	13,383

SOURCE: \*1980 Editor and Publisher Market Guide  
\*\*1979 Survey of Buying Power



PART FIVE - MAJOR INDUSTRY SECTORS

Retail Trade and the Trade Area

The retail trade area of Bismarck has been delineated with respect to the competitive influence on the trade area consumer of Minot to the north, Dickinson to the west, Jamestown and Fargo to the east, and Aberdeen and Pierre, South Dakota to the southeast and south. Also considered have been the adequacy of roadways, and the natural barriers to population movement. As indicated by the following map, the retail trade area of Bismarck extends into South Dakota.

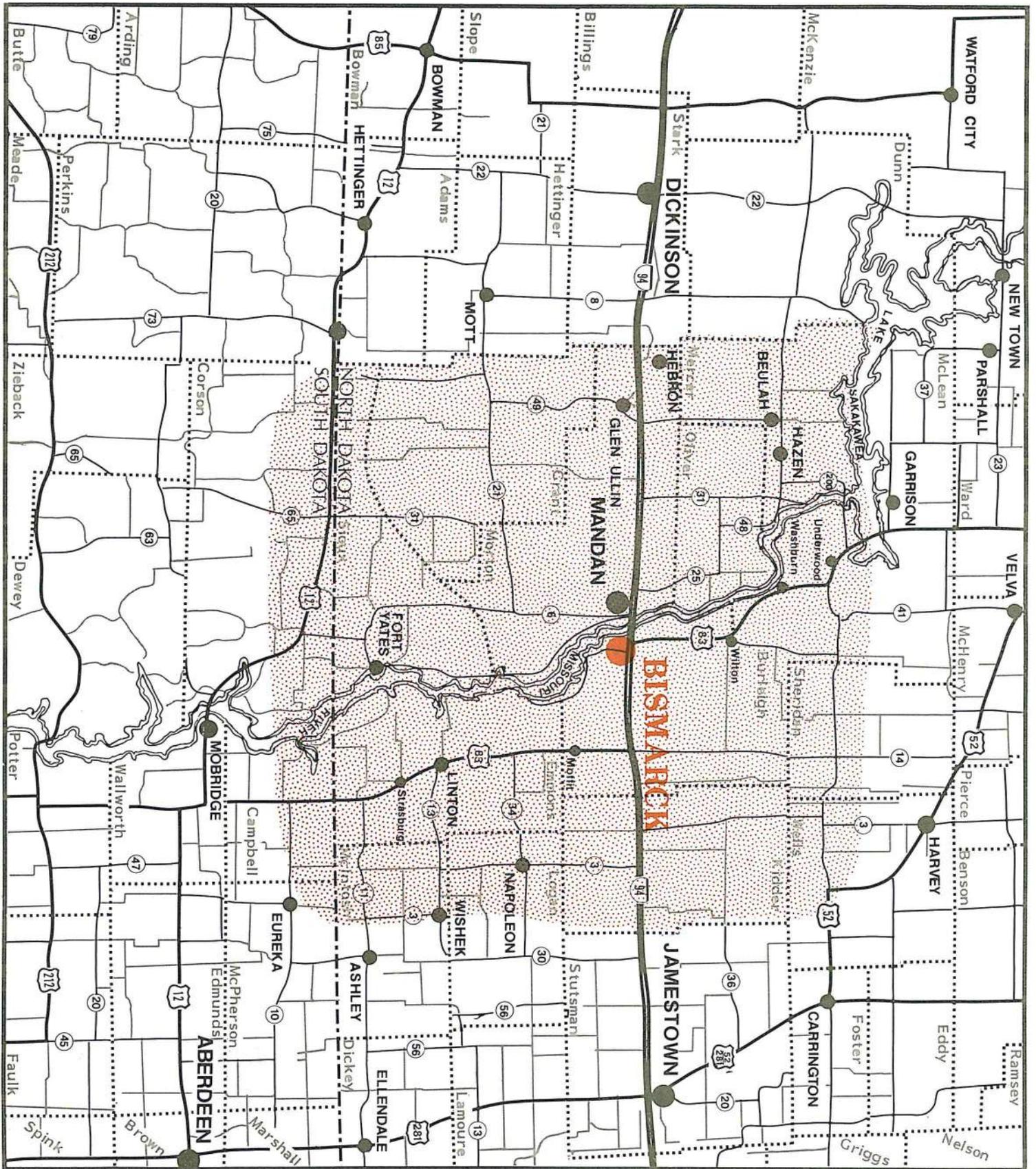
The present trade area population is approximately 127,000 persons, which is a 14.6 percent increase over the 1970 population. The Bismarck-Mandan area has increased in population, while surrounding agricultural counties within the trade area lost population primarily due to out-migration.

TABLE VII  
TRADE AREA POPULATION  
1960-1980

<u>North Dakota Counties</u>	<u>1960</u>	<u>1970</u>	<u>1980</u>
Burleigh	34,016	40,714	54,659
Emmons	8,462	7,200	5,760
Grant	6,248	5,009	4,244
Kidder	5,386	4,362	3,970
Logan (Pt.)	2,685	2,123	1,741
McIntosh (Pt.)	3,351	2,773	2,385
McLean (Pt.)	5,612	4,500	4,815
Mercer	6,805	6,175	9,016
Morton	20,992	20,310	24,934
Oliver	2,610	2,322	2,438
Sheridan (Pt.)	3,045	2,262	1,968
Sioux	3,662	3,632	3,000
Wells (Pt.)	1,847	1,569	1,364
Campbell (South Dakota Pt.)	3,531	2,866	2,200
Corson (South Dakota Pt.)	5,798	4,994	5,000
<b>Total Trade Area</b>	<b><u>114,050</u></b>	<b><u>110,811</u></b>	<b><u>127,494</u></b>

SOURCE: 1960, 1970 U. S. Census  
1980 Advance U.S. Census Reports  
K. Bordner Consultants





# TRADE AREA BISMARCK, NORTH DAKOTA



## Per Capita Sales

Table VIII, following, shows per capita expenditure levels for the State of North Dakota in selected major retail categories.

TABLE VIII  
PER CAPITA RETAIL SALES  
STATE OF NORTH DAKOTA  
(Thousands)

	<u>1977</u>	<u>1980</u>	<u>Compounded Average Annual Increase</u>
Total Retail Sales*	\$3,479	\$5,148	13.7%
<u>Selected Categories</u>			
General Merchandise	338	476	12.1%
Apparel & Accessories	202	298	13.8%
Furn., Home Furns. & Appl.	151	218	13.0%
Lmbr., Hrdw. & Bldg. Mat.	380	593	16.0%
Food	575	851	14.0%
Automotive	869	1,244	12.7%
Gasoline	313	447	12.6%
Eating & Drinking	295	431	13.5%
Drug	107	158	13.9%

\*Includes categories in addition to selected categories.

SOURCE: 1977 U.S. Census of Retail Trade  
1980 Editor and Publisher Market Guide  
Bordner Consultants

The 1980 figures have been compared with figures from the 1977 U. S. Census of Retail Trade. Note that there were annual increases ranging from 12.1 percent in General Merchandise to 16.0 percent in Lumber, Hardware and Building Materials.

### Retail Sales Analysis

The Bismarck-Mandan trade area, as described previously, has an estimated 1980 population of 127,000 persons. The Number of Persons Served column in Table IX following, was determined by dividing per capita sales levels from Table VIII into estimated trade area sales for 1980 (these are sales occurring within the entire trade area).



TABLE IX  
NUMBER OF PERSONS SERVED  
BISMARCK-MANDAN TRADE AREA  
1980

	<u>State Per Capita Sales</u>	<u>Est. Trade Area Sales (\$000,000)</u>	<u>Number of Persons Served</u>	<u>Trade Area Population Differential</u>
Total Retail Sales*	\$5,148	\$671.5	130,439	+ 3,439
<u>Selected Categories</u>				
General Merchandise	476	70.6	148,319	+21,319
Apparel & Accessories	298	32.8	110,067	-16,933
Furn., Home Furns. & Appl.	218	27.2	124,771	- 2,229
Lmbr., Hrdw., & Bldg. Mat.	593	82.7	139,460	+12,460
Food	851	126.5	148,649	+21,649
Automotive	1,244	150.5	120,981	- 6,019
Gasoline	447	55.5	124,161	- 2,839
Eating & Drinking	431	55.5	128,770	+ 1,770
Drug	158	23.8	150,633	+23,633

\*Includes categories in addition to selected categories.

SOURCE: 1980 Editor & Publisher Market Guide  
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The Number of Persons Served figure can be used to compare the relative success of trade area retail facilities, both to other categories and to the gross potential within the trade area by comparing it to the trade area population (127,000). Although differences in levels of service exist between categories, the area's retail facilities are adequately serving the trade area population as reflected by the positive Trade Area Differential for Total Sales.

Differences reflected in various categories may be the result of many factors, including differences from the state average in spendable income and buying habits, as well as retail sales gained from out-of-area consumers. Apparent deficits in the Number of Persons Served may also be due to a lack of retail stores in a particular category or a net loss of sales to surrounding competitive trade centers, which is known as sales leakage. It is important to note that in many middle market or mid-size urban areas, similar to Bismarck-Mandan, the situation revealed in Table IX does not exist.



Rather, a more typical situation is one in which there is a significant sales leakage in several or all retail categories, due to an inadequate supply of modern shopping facilities which can fulfill the area's consumer demands. Bismarck-Mandan has been very successful in retaining the trade area consumer, who also represents income to many other service and business sectors of the local economy.

The amount of retail sales captured in Bismarck-Mandan is due in large part to both the Kirkwood Plaza Shopping Center (located within the study area) which recently expanded to 830,000 square feet gross leasable area (GLA) and the new Gateway Mall Shopping Center with 284,000 square feet GLA. Other area business and industry sectors, described below, also have had a significant role in maintaining Bismarck-Mandan as the major trade and business hub of the area.

Health Service Industry

The health service industry in Bismarck provides employment for local residents and plays an integral part in maintaining the city's status as a major center for residents of outlying trade area communities. Two major hospitals with allied clinic and support services are located within the Central Business District.

The State of North Dakota ranked first in the nation in 1976 in terms of total hospital beds per 1,000 population, according to data published by the American Hospital Association. The following table shows selected states and their ranking.

TABLE X  
TOTAL BEDS PER 1,000 POPULATION  
SELECTED STATES - 1977

North Dakota	7.1
Minnesota	5.9
South Dakota	5.6
Montana	5.1
New York	4.7
California	3.8
Arizona	3.7

SOURCE: Selected Community Hospital Indicators, AHA



Hospital services in the Bismarck area are dominated by the two major hospitals, Bismarck Hospital (194 beds) and St. Alexius Hospital (259 beds). Additionally, in the immediate Bismarck-Mandan urban area there are four long term care facilities totaling 478 beds and two custodial care facilities and one smaller hospital, Mandan Hospital (56 beds).

Table XI, below, shows a steadily increasing growth in hospital admissions, although total patient days have declined somewhat due to a decrease in the average length of stay. Bismarck Hospital reports that admissions in the first half of 1980 are 25 percent greater than the same period in 1979.

TABLE XI  
BISMARCK-MANDAN HOSPITALS  
UTILIZATION INDICATORS  
1975-1979

	<u>1975</u>	<u>1979</u>	<u>% Change</u>
Total Beds	502	509	+ 1.4%
Admissions	17,151	19,441	+13.4%
Patient Days	123,735	121,545	- 1.8%
Avg. Length of Stay (Days)	7.2	6.3	-12.5%

The hospital service area encompasses a large number of North Dakota counties as well as portions of South Dakota and Montana. However, available data pertaining to Bismarck Hospital patients for 1979 show that 83.3 percent of all patients came from within the previously delineated retail trade area. Fifty-nine percent came from within Burleigh and Morton counties; 5.1 percent from South Dakota and 3.2 percent from other states.

St. Alexius and Bismarck Hospital both have recently undergone extensive remodeling. St. Alexius reports that it is planning for expansion within the next two to five years, although plans have not been finalized. The importance of these hospitals to the community and the Central Business District is exemplified by statistics from St. Alexius which show a \$20 million annual budget, as well as 915 full- and part-time employees, which represents a full-time equivalency of approximately 700 employees.



The Bismarck-Mandan area has approximately 130 licensed physicians representing a wide range of specialties. According to local hospital sources, one of the reasons for the extensive service area of the local hospitals is the number of specialists. As an example, the Bismarck Hospital began open heart surgery procedures in the fall of 1979.

The city has established a Medical Facility District encompassing an 18 square block area which is partially within the CBD study area. The purpose of the Medical Facility District is to insure the continuation of medical services within the downtown area by encouraging the development of compatible uses within the immediate area and discouraging land use which would be disruptive. This aggressive and unique posture on the part of the city has helped to insure the viability of this important element of the downtown business structure. It is reported that the two major city hospitals have had recent opportunities to move to new facilities in outlying locations, as has occurred in many other communities, but have elected instead to modernize and expand existing facilities in the CBD area.

In addition to the two major hospitals, three other major facilities are located in the immediate area. The Quain and Ramstad Clinic, referred to locally as the Q & R Clinic, with 44 doctors, the Mid-Dakota Clinic with 15 doctors and the Medical Arts Building, are all located adjacent to the hospitals. The Q & R Clinic recently received approval of its plans to vacate Thayer Avenue. It is proposing a new facility which will be constructed across Thayer Avenue and will connect with Bismarck Hospital. The Mid-Dakota Clinic has begun construction of a tunnel under Rosser Avenue which will connect it to St. Alexius Hospital. Additionally, Bismarck Hospital has a school of nursing, and St. Alexius is affiliated with the nursing program at Mary College, which is located south of the city. Bismarck's aggressive medical community is strongly supported by the city.

#### Government

As described previously, government employment presently accounts for over 22 percent of all jobs in the Bismarck-Mandan area. As might be expected,



state government accounts for over half (54 percent) of that employment. In addition, as the state capital, Bismarck also generates considerable other service employment, especially in the professional fields. The availability of government employment tends to increase Bismarck's overall family income by providing many jobs, including clerical and mid-management positions, which provide opportunity for two-wage earner families. This is offset to some extent by the influx of entry level employees from surrounding areas.

The state capitol complex (see aerial photos) is located immediately north of the CBD study area. The state capitol and other existing buildings in the complex presently have approximately 400,000 square feet of gross area. Presently under construction are two new buildings, the Heritage Center and a Judicial Wing of the capitol, which total 280,000 square feet and are scheduled for completion in October, 1980 and July 1981, respectively.

### Energy Industry

Economic conditions and international affairs have influenced the availability and cost of all forms and sources of energy. Events precipitating these apparent shortages and cost increases have been widely publicized and have resulted in an increasing consciousness of the need for energy conservation, further development and efficient use of energy reserves within the United States.

Employment, capital investment and other economic advantages have accrued to cities in or near areas of large known mineral reserves. In Bismarck both direct and indirect impacts on the economy are occurring as a result of the following factors.

1. Increasing activity in the development of the large lignite coal deposits of western North Dakota.
2. Development of facilities utilizing new methods for the processing of lignite coal.
3. Construction of new coal-fired power plants.
4. Development of known oil reserves.
5. Continued exploration for new oil reserves.



6. Construction of the Northern Border Pipeline which will traverse the area near Bismarck. There will be a pumping station and pipeline junction which would allow for connection with future pipelines as a major terminal.

Coal development areas in the Bismarck region are shown on the Energy Facilities Location Map on the following page. It shows the proximity of the various coal mines, power plants and the proposed gasification plant to the city of Bismarck. Note that, with the exception of the westernmost development areas in Dunn and Stark Counties near the city of Dickinson, the developable areas are within the previously delineated retail and service area of Bismarck-Mandan within a 70 mile radius of the city.

As can be seen in Table XII, annual coal production in the three primary coal producing counties is estimated to have more than doubled since 1975, with an increase to nearly 18 million tons by 1985. This is an overall increase for the ten year period of 225.9 percent or an annual compound increase of 12.5 percent.

TABLE XII  
COAL PRODUCTION  
MCLEAN, MERCER AND OLIVER COUNTIES  
1975-1985 (millions of tons)

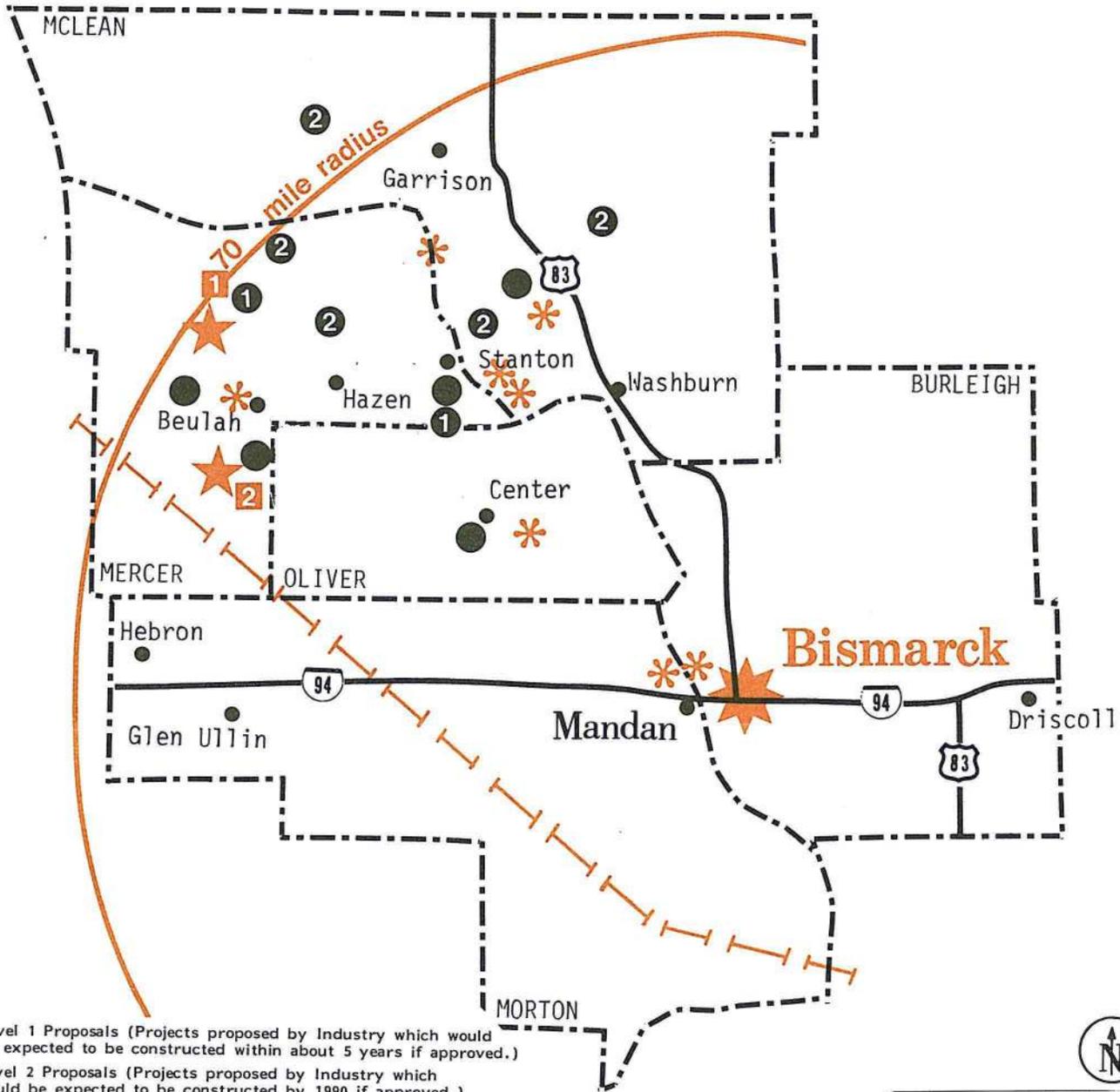
<u>Fiscal Year</u> <u>Ending</u>	<u>McLean</u>	<u>Mercer</u>	<u>Oliver</u>	<u>Total</u>
1975	-0-	3.8	1.6	5.4
1976	-0-	5.5	1.7	7.2
1977	-0-	6.3	2.1	8.4
1978	.2	6.2	3.0	9.4
1979	.9	5.8	4.6	11.3
1980	1.5	5.7	4.8	12.0
1981	2.3	5.7	5.0	13.0
1982	2.8	5.7	5.4	13.9
1983	3.1	6.9	5.6	15.6
1984	3.3	7.6	5.6	16.5
1985	3.6	8.4	5.6	17.6
Ten year increase	12.2 million tons (225.9 percent increase or 12.5 percent Annual Compound Increase)			

SOURCE: 1975-1978 North Dakota Annual Coal Mining Report  
The North Dakota Public Service Commission  
1979-1985 Individual Mining Companies' Estimates



# Energy Facilities Location Map

## Bismarck, North Dakota



Level 1 Proposals (Projects proposed by Industry which would be expected to be constructed within about 5 years if approved.)

Level 2 Proposals (Projects proposed by Industry which would be expected to be constructed by 1990 if approved.)

SOURCE: "West Central North Dakota Regional Environmental Impact Study on Energy Development," Bureau of Land Management, 1977.

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- COAL MINES EXISTING OR UNDER CONSTRUCTION
- ① COAL MINES PROPOSED (LEVEL 1)
- ② COAL MINES PROPOSED (LEVEL 2)
- \* ENERGY FACILITIES EXISTING OR UNDER CONSTRUCTION
- ① ELECTRIC POWER PLANTS PROPOSED (LEVEL 1)
- ② ELECTRIC POWER PLANT PROPOSED (LEVEL 2)
- - - OIL OR GAS PIPELINE PROPOSED
- ★ GASIFICATION PLANT PROPOSED (LEVEL 1)

TABLE XIII  
MERCER COUNTY  
PROJECTED CONSTRUCTION AND OPERATIONAL EMPLOYMENT  
ENERGY CONVERSION AND COAL MINE FACILITIES  
1979-1989

<u>Year</u>	<u>Construction Employment</u>	<u>Operational Employment</u>	<u>Total</u>
1979	3,424	424	3,848
1980	2,612	577	3,189
1981	1,831	799	2,630
1982	3,132	1,299	4,431
1983	3,006	1,439	4,445
1984	750	1,523	2,273
1985	718	---	---
1986	1,881	---	---
1987	2,467	---	---
1988	600	---	---
1989	-0-	1,788	1,788

SOURCE: Mercer County Socio-Economic Impact Mitigation Assessment,  
Volume VI, January 1980.  
K. Bordner Consultants

Power plants now under construction in both Mercer and McLean Counties will have the capacity of 2,346 megawatts by completion in the mid-1980's. Note that the figures from Table XIII are for Mercer County only. A comprehensive environmental impact study of energy development in the surrounding seven county area was also conducted by the U.S. Department of Interior. Although published in January of 1978, the information gives a useful picture of the overall impact expected on the area in the 1980's. That study shows overall employment levels from energy related development increasing to 7,500 plus in the 1980's and stabilizing at a permanent employment force of about 3,500 by the end of the decade, or approximately twice the levels shown above for Mercer County. A summary table of employment projections from that study is included in Appendix B.

The ANG Coal Gasification Facility located near Beulah in Mercer County, is a \$1.5 billion project being developed by a consortium of companies led by American Natural Resources Company. The plant will be the first commercial gas plant in North America to process lignite coal into synthetic natural gas and is a direct result of the national priority on the development of synthetic fuels. The plant is



scheduled for completion in the mid-1980's and accounts for a large portion of the Mercer County construction employment in Table XIII. The construction of the plant itself will be directed by the Kaiser Aluminum Company.

Various surveys of the place of residence and commuting habits of construction workers have been conducted. These surveys show that nearly 50 percent of all commuting workers come from Bismarck-Mandan and that this is equal to about 20 percent of all workers. In addition, approximately 15 percent of all workers relocating to the coal counties are from the Bismarck-Mandan area.

Oil production in North Dakota is located in parts of the Williston Basin. It reached 37 million barrels in 1979, ranking the state tenth in the nation, surpassing Colorado. Increased activity is occurring in exploration. Ninety-four of the 120 drilling rigs that are presently in the Williston Basin operate in North Dakota. There are presently 42 seismic companies working in the state, which is more than any Rocky Mountain region state. New production is expected to increase oil production to 58 million barrels per year by 1985. Although oil production has been centered in the western counties of North Dakota, exploration is now moving to the south and east into the immediate Bismarck area along the eastern edge of the Williston Basin. It is reported that exploratory wells are significantly shallower and thus cheaper to drill in this eastern edge with financial risks significantly reduced. It is expected that as this more easterly activity continues, Bismarck will become the major "jumping off" point for the oil industry in this area.

Coal mining and conversion facilities have received the most publicity within the past few years because of their obvious controversial impacts and their high visibility. Persons familiar with the energy industry indicate, however, that oil exploration and production may have a greater long-term economic impact on the area. Due to the increasing cost of oil, petroleum now accounts for 82 percent of the value of all minerals produced in the state. Proven reserves of oil and gas are now in excess of 700 million barrels.



## PART SIX - CENTRAL BUSINESS DISTRICT OVERVIEW

### Area Definition

The Central Business District (CBD) study area, as defined by the Bismarck City Planning Department for the purpose of this analysis, consists of a primary and secondary area. The secondary area is bounded by Bismarck Avenue on the South and Avenue C on the North. Washington Street and 11th Street are the boundaries to the west and east, respectively. The primary CBD study area, which is the focus of this analysis, is a forty-nine square block area that extends from Avenue A to Bowen Avenue and from 2nd Street to 9th Street (see Study Area Photo and Map). The entire subject area contains a concentration of commercial businesses including the Bismarck Civic Center and the Kirkwood developments, which will be described in detail later in this report. The North Dakota State Capitol is located four blocks north of the study area.

### History/Orientation

The City of Bismarck once served as an important railroad center for a large portion of North and South Dakota. There is no longer passenger traffic through Bismarck, but freight traffic is still prevalent. Presently, Bismarck is a prominent trade and service center for western and central North Dakota. During the past decade, major retail tenants have moved from Bismarck's downtown area to shopping center locations in the Secondary Study Area (Kirkwood Plaza) and to suburban sites (Gateway Mall). The 1980 Comprehensive Plan developed by the Bismarck-Burleigh County Planning Department describes the downtown as changing from a retail center to an office, financial and medical center, with accessory commercial and retail establishments. Recent energy developments in the area are also increasing the city's prominence in the energy industry.



# Bismarck, North Dakota Study Area



94

83 94

GATEWAY MALL  
K-MART

US-83  
Business Route

NORTH HIGHLAND  
S

N.D. STATE CAPITOL

MUNICIPAL  
GOLF COURSE

ARROWHEAD  
PLAZA

6th St.  
5th St.  
4th St.  
3rd St.  
2nd St.  
1st St.

Mandan St.  
Washington St.

Ave. C  
Ave. B  
Ave. A

Rosser Ave.  
Haver Ave.  
Broadway Ave.  
Main Ave.

Front Ave.  
Sweet Ave.  
Bowling Green

Indiana Ave.  
Arbor Dr.

BISMARCK  
AUDITORIUM

BISMARCK  
CIVIC CENTER

KIRKWOOD  
PLAZA

KIRKWOOD  
MOTOR  
INN

Arbor Ave.

KIRKWOOD OFFICE  
TOWER

10th St.  
9th St.  
8th St.  
7th St.

SECONDARY AREA

PRIMARY AREA

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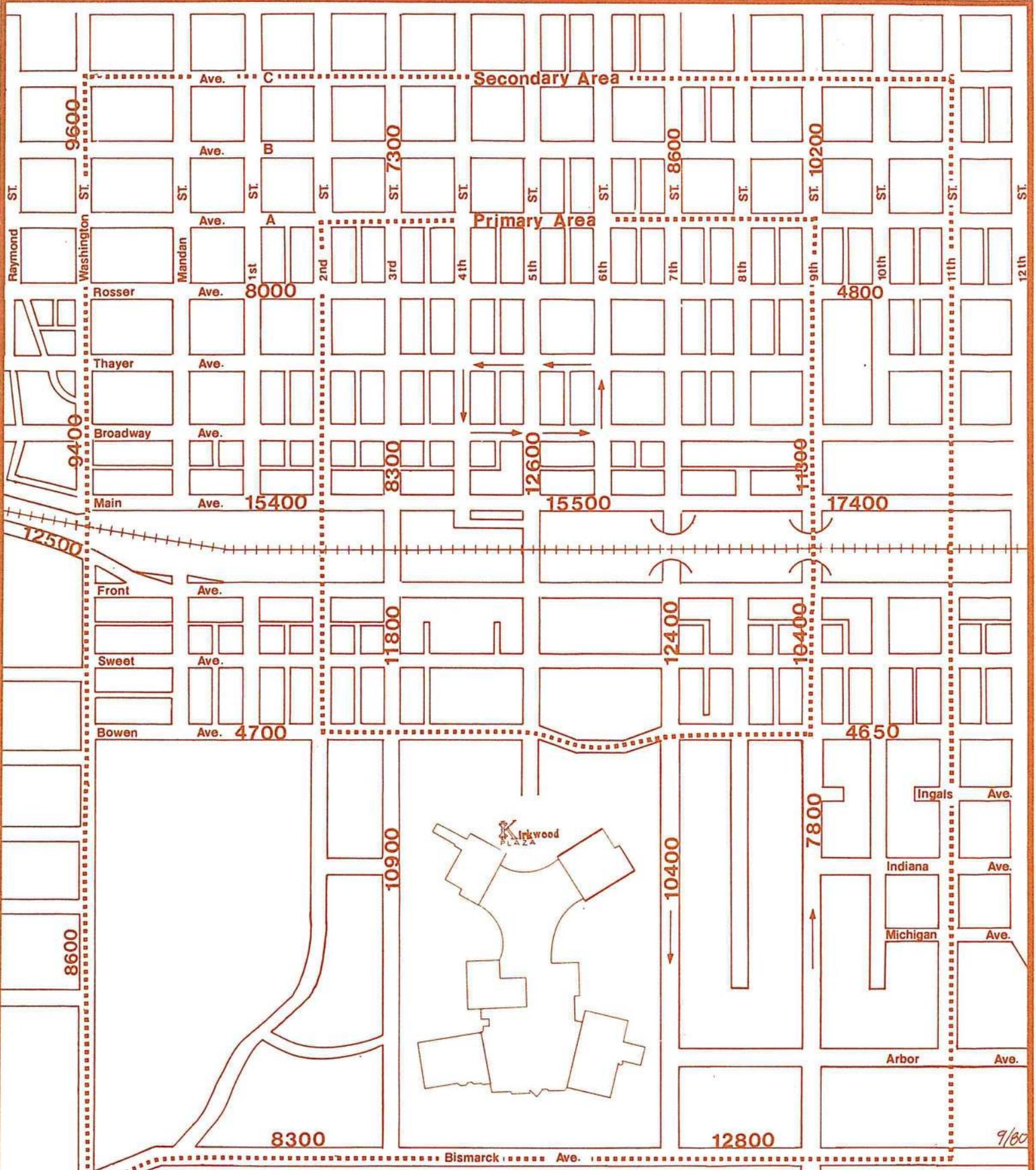
## Access

Interstate Highway 94 is the major east-west route joining the City of Bismarck with several of North Dakota's other major population centers: Dickinson, Jamestown and Fargo. Interstate 94 is approximately 1.8 miles to the north of the CBD with the present connecting business route (Main Avenue) passing directly through the city center. This business route (formerly U.S. Highway 10) provides direct access from the nearby city of Mandan. According to the most recent traffic counts, this roadway carries 18,000 vehicles daily across the Memorial Bridge which crosses the Missouri River connecting Mandan and Bismarck.

U.S. Highway 83 is the principal north-south highway serving the city. Coming from the north, this route turns east following Interstate 94 to a point approximately 25 miles east of the city before continuing south. Thus, the major roads which carry southbound and northbound traffic through the CBD are 7th and 9th Streets. The daily traffic counts on 7th and 9th Street north of Main Avenue are 12,600 and 11,300 respectively. These business routes link the commercial developments and growth areas to the north and south, including the state capitol complex, with the CBD.

The Burlington Northern Railway passes through the southern extreme of the primary study area carrying approximately twenty trains per day at an average interval of one hour and twenty minutes. Thus, during an average period from 6:00 a.m. to 6:00 p.m., approximately ten trains with an average length of 100-cars can be expected. Both 7th and 9th Streets have railroad underpasses, while 3rd and 5th Streets, other principal north-south routes, are grade crossings. The average daily traffic counts on 3rd and 5th Streets at the tracks is 11,800 and 5,500 respectively. Due to the frequency of train passage, traffic congestion on 3rd Street can be a problem and the lack of a grade separation contributes to increased traffic on 7th and 9th Streets. Burlington Northern is in the process of constructing a new car repair facility which is expected to increase train traffic through the area to twenty-six to thirty trains per day. See Traffic Volumes Map following for selected traffic counts for the CBD.

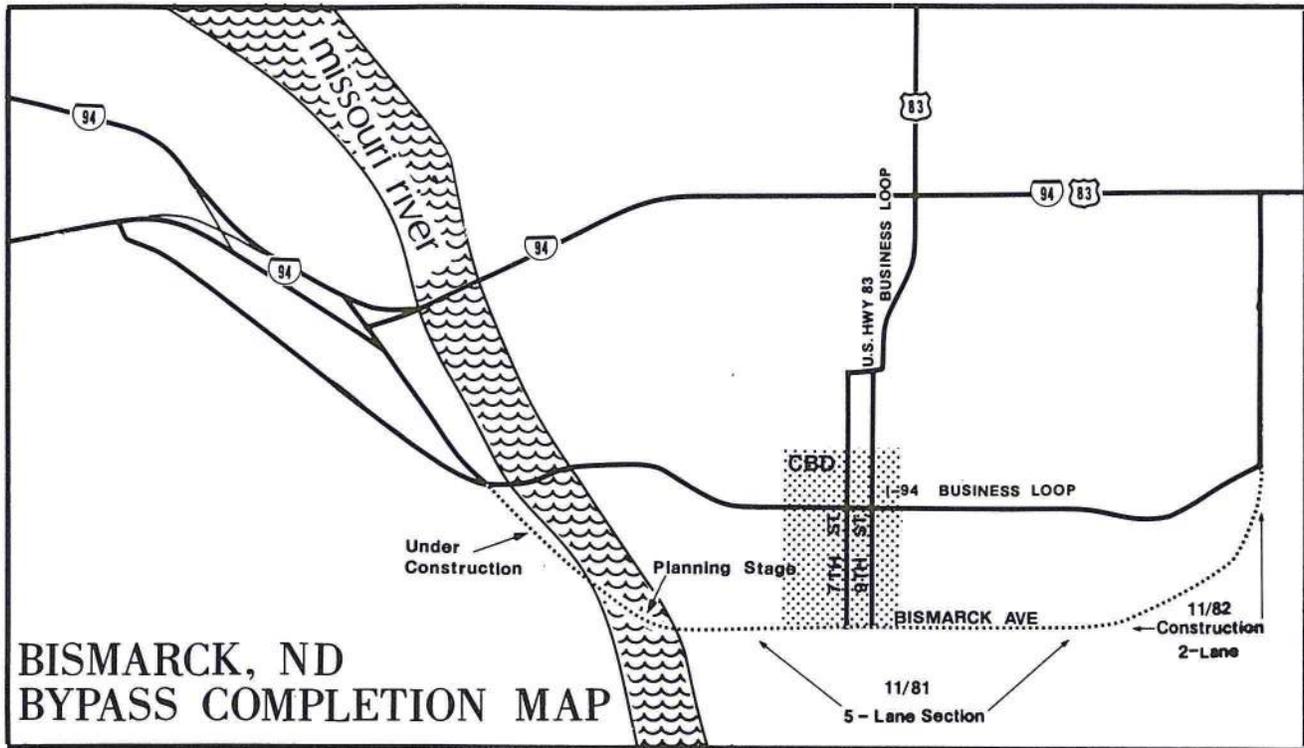




# SELECTED TRAFFIC VOLUMES BISMARCK, N.D.

1980 AVERAGE DAILY TRAFFIC VOLUMES

Construction has begun on a southern arterial loop which will reroute traffic from Main Avenue, around the southern end of the secondary central business area along Bismarck Avenue as shown below.



Construction is expected to be completed in 1981 on the five-lane section which will extend from Washington to 26th Street. The two lane continuation, completing the route to the business loop on the east, is planned for 1982. Upon completion, this new arterial route, along with the existing northern I-94 extension, will form a continuous loop around the city and will provide for more efficient traffic movement throughout the Bismarck area, enabling residents to travel from one section of the city to another without necessarily passing through the CBD. This will have special significance during peak traffic hours in helping to alleviate future congestion on those major arteries passing through the city center.

The city has also converted a four square block area in the CBD on Broadway and Thayer Avenue (see map) into one-way streets in an attempt to provide CBD pedestrians with more convenient parking and business access.

In July, 1980, the Bismarck City Commission approved the closing of Thayer Avenue between 6th and 7th Streets to facilitate the expanding medical services in the area. Thayer Avenue is also discontinued between 9th and 10th Streets allowing for pedestrian movement from St. Alexius Hospital to its adjacent parking facility.

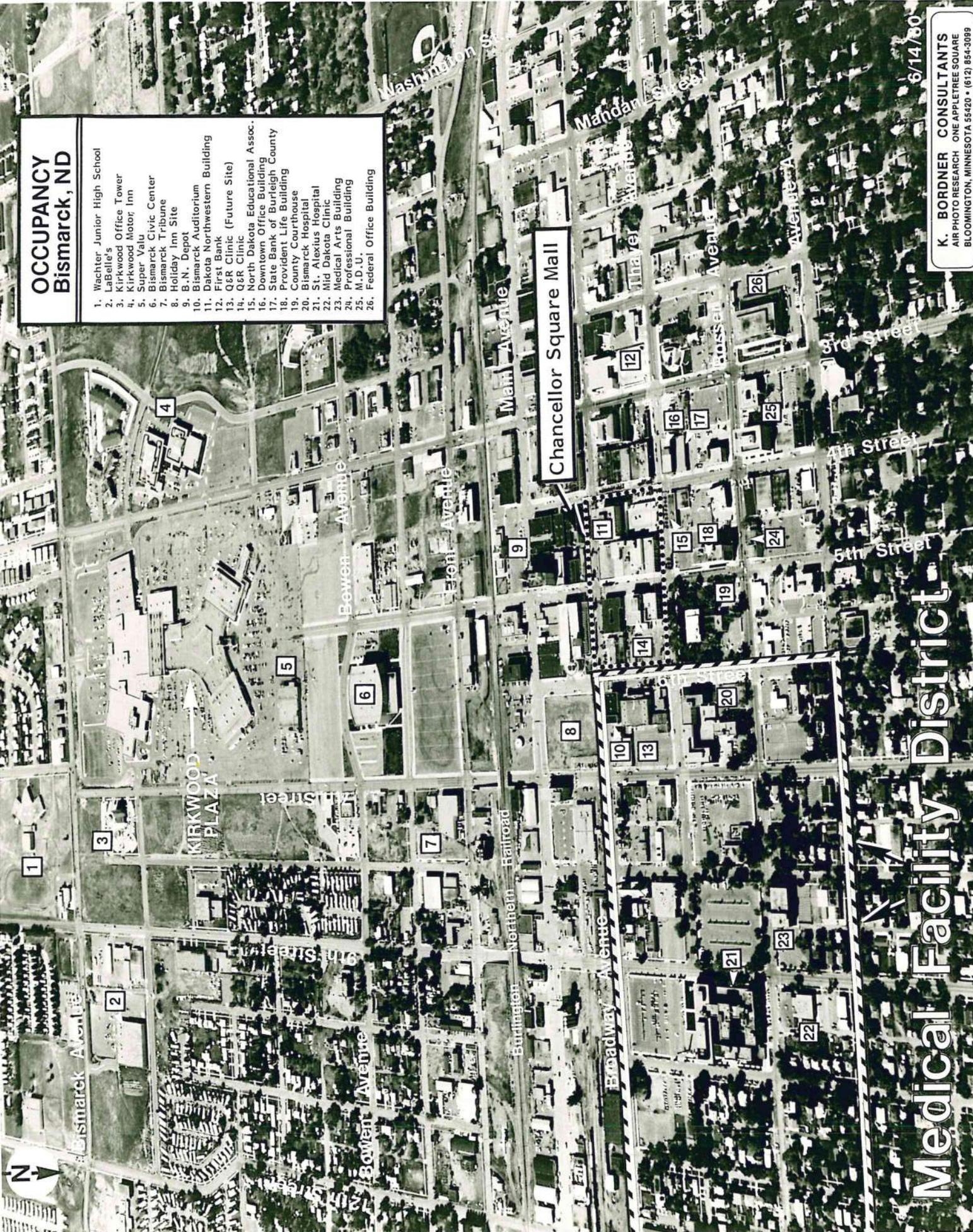
#### Medical Facility District

As previously discussed, the City of Bismarck has designated an eighteen block area within the CBD as a Medical Facility District (see following photo) and has restricted use within this area. The principal development in this district is medical- and health-related. Other land uses within the district have been restricted to those which are compatible with the medical community. Professional office space within the district will be limited to fifty percent non-medical. Retail uses are limited to health services and personnel related conveniences. Other permitted uses within the area: hotel-motel, public recreation, residential housing, financial institutions, utility services and community parking lots. Restaurants can be established but all the food must be consumed within an enclosed building.

#### Beautification Project

In 1977, the city formulated a beautification project in the Central Business District that includes a six-linear block area along Thayer Avenue, 4th Street, Broadway Avenue and 6th Street. One-way traffic through this area allowed diagonal parking to be implemented along the roadway. Sidewalks were expanded to allow for benches and tree plantings. This urban renewal project was funded by the Department of Housing and Urban Development and is referred to as the "Chancellor Square Mall".





# OCCUPANCY Bismarck, ND

1. Wächter Junior High School
2. LaBelle's
3. Kirkwood Office Tower
4. Kirkwood Motor Inn
5. Super Valu
6. Bismarck Civic Center
7. Bismarck Tribune
8. Holiday Inn Site
9. B.N. Depot
10. Bismarck Auditorium
11. Dakota Northwestern Building
12. First Bank
13. Q&R Clinic (Future Site)
14. Q&R Clinic
15. North Dakota Educational Assoc.
16. Downtown Office Building
17. State Bank of Burleigh County
18. Provident Life Building
19. County Courthouse
20. Bismarck Hospital
21. St. Alexis Hospital
22. Mid Dakota Clinic
23. Medical Arts Building
24. Professional Building
25. M.D.U.
26. Federal Office Building

Chancellor Square Mall

Medical Facility District

6/14/80

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## Parking

Parking has become a significant factor in the development of the Central Business District of Bismarck. In 1978, a parking study was conducted by Barton-Aschman Associates for the City of Bismarck which evaluated existing downtown parking to determine future parking needs. The parking study area consisted of 85 blocks in the core central business district. At the time the study was conducted, 150 public parking spaces south of the Civic Center were not available for use due to construction in the area and therefore were not included in the inventory. The study area contained 10,640 parking spaces including 2,160 on-street spaces. Free parking is provided for downtown shoppers in five "Park and Shop" lots (593 spaces total), these are located within the central core area. Parking spaces were distinguished by type of user: on-street spaces available to the general public, and reserved spaces for employees, customers and residents. This was further categorized as short-term and long-term parking, with 38 percent of all parking spaces available to the general public. The principal findings of the study revealed that during peak parking hours, 79 percent of parked vehicles belonged to downtown employees. Approximately 50 percent of vehicles using on-street spaces with time limits were in violation of the posted limits. It was found that there would be adequate short-term (shoppers) parking downtown if employee parking could be better provided for.

Since this study was done, the major retail tenants, J.C. Penney, Sears, and A.W. Lucas, have moved to outlying shopping centers alleviating some of the downtown parking demand, and the northern Civic Center parking lot has been made available for downtown employees for a small fee. However, new developments downtown are encouraged to supply their own parking and ramp facilities should be considered where feasible.



# CENTRAL BUSINESS DISTRICT Bismarck, North Dakota

**Existing Land Use**

- Commercial
- Medical
- Public/Utilities
- Financial
- Office
- Industrial
- Public Parking
- Area of Study
- Medical Facility District



7/10/80

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## PART SEVEN - EXISTING CENTRAL BUSINESS DISTRICT INVENTORY

An examination of the occupancy of the primary and secondary study areas of the Central Business District is an integral part of our analysis and determination of future needs for retail, lodging, office and other service facilities in Bismarck. The primary forty-nine block area is composed of major medical, public and financial institutions, as well as principal office, retail and service facilities (see CBD Occupancy Map).

### Primary Area

#### - Medical and Health Facilities -

As previously discussed, the City of Bismarck has designated an area in the northeast corner of the CBD as a Medical Facility District. Located within the Medical District are the two major Hospital Complexes: Bismarck Hospital and St. Alexis Hospital. In addition, located within the medical district is the new development site of the Q&R Clinic, the Mid-Dakota Clinic, the Medical Arts Building, and the Family Practice Center. Other facilities within the district include the World War Memorial Building, the Bismarck Auditorium and St. Mary's Church and Elementary School. The Auditorium, which seats approximately 900, is presently being renovated but is still in operation. The World War Memorial Building is used for public recreation. Within the northernmost portion of the Medical District, there is residential housing and near the southern boundary are miscellaneous retail and service establishments. Bismarck City Hall is located within the district but will be moving into the present Q & R Clinic building, outside of the district, upon completion of the Clinic's new facility.

#### - Public and Financial Institutions -

To the west of the Medical District, and north of the primary retail and service area, are a number of public and financial institutions. The Burleigh County Courthouse and the new site for City Hall are located immediately west of the Medical District boundary. An older federal building as well as an office build-



ing which houses the U.S. Post Office and other Federal offices is located in this northwestern section of the CBD. Other occupants of this northwestern area include Montana-Dakota Utilities, Northwestern Bell, and a majority of the major financial institutions. These include: Dakota Northwestern Bank; First Bank-Bismarck, State Bank of Burleigh County; Northwestern Federal Savings and Loan; Gate City Savings & Loan; Metropolitan Savings & Loan, Federal Land Bank Association; Midwest Federal Savings & Loan; and First Federal Savings & Loan. Most of these institutions are in newly constructed buildings reflecting a new vitality in the Central Business District.

The 8,000 seat Bismarck Civic Center is located within the Primary Study Area directly south of the central business core between Kirkwood Plaza and the railroad tracks. There are also a number of fast food restaurants located nearby.

- Retail Area -

A seven-block area in the southwestern section of the primary central business core contains the leading retailers in the downtown district. This region includes Chancellor Square Mall, and has a well-balanced mix of general retail and service establishments (see the following CBD Occupancy Map).

The City Center Plaza, a new office-retail renovation project, is presently under construction at the corner of Broadway and 5th Street within Chancellor Square Mall.

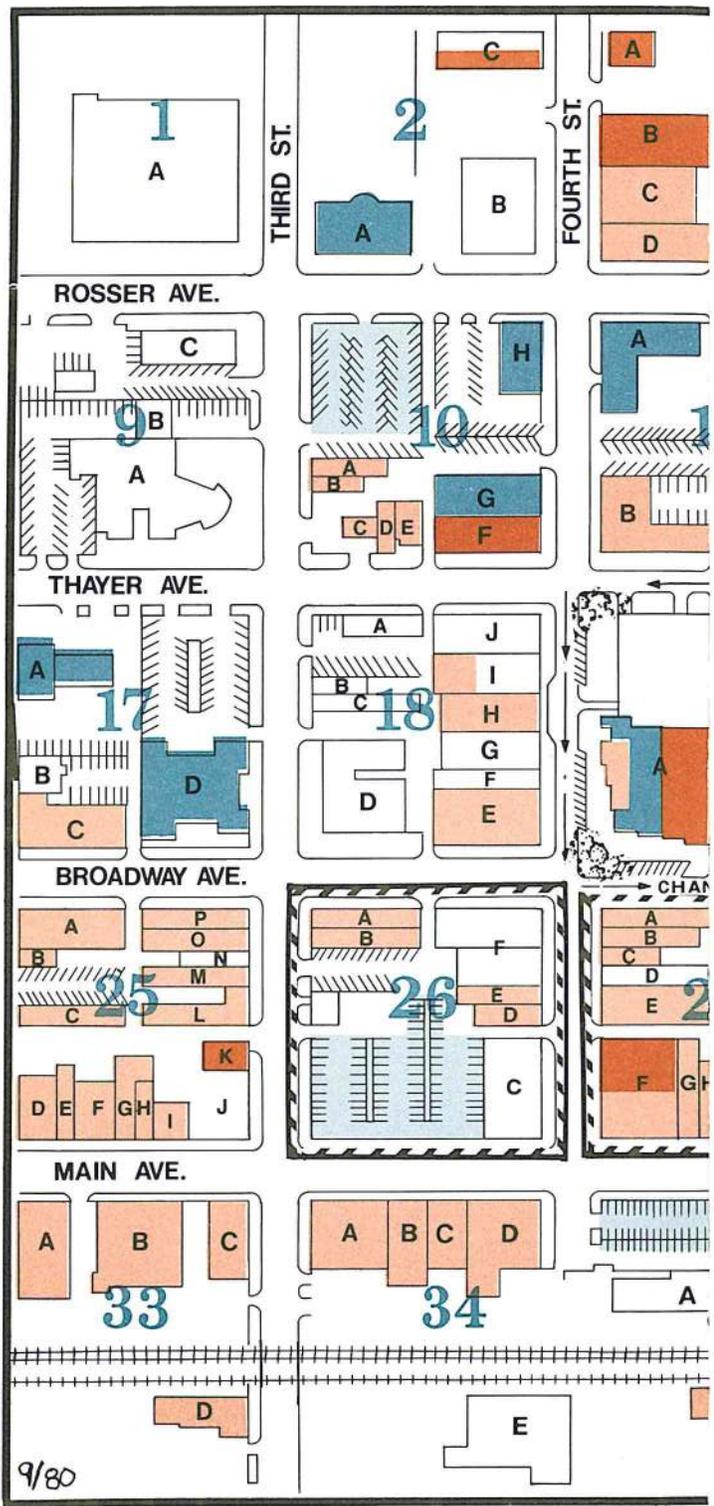
The Burlington Northern Railway passes through the southern extreme of the primary study area. The property to the south and northeast of the tracks is presently used primarily for warehouse and light industrial activities.

A vacant railroad depot, owned by Burlington Northern, is centrally located along the northern side of the tracks and has been placed on the National Register of Historic Places. The depot is presently the subject of discussion for renovation and redevelopment as a restaurant. Two blocks to the northeast of the depot is the site of a proposed Holiday Inn Hotel, now scheduled for construction in the fall of 1980.



# LEGEND

- BLOCK 1**  
 A Federal Offices/U.S. Post Office
- BLOCK 2**  
 A Gate City S. & L. Assoc.  
 B Montana Dakota Utilities Company  
 C Same as B
- BLOCK 3**  
 A Office Building  
 B #11 Professional Building  
 C Ace Hardware  
 D Dakota Twin Theatres  
 E Missouri Land Company  
 F Professional Office Building  
 G Office Building
- BLOCK 4**  
 A Metropolitan Federal S. & L. Assoc.  
 B Bank Drive-Up  
 C Dakota Northwestern Bank Drive-Up  
 D Gas Station  
 E Federal Land Bank Association
- BLOCK 5**  
 A Apartments  
 B Gas Station
- BLOCK 6**  
 Residential
- BLOCK 7**  
 A Medical Arts Building
- BLOCK 8**  
 A Mid Dakota Clinic
- BLOCK 9**  
 A First Presbyterian Church  
 B Apartments  
 C American Legion Club
- BLOCK 10**  
 A Neuens' Western Shop  
 B The Drumstick Cafe  
 C Gartner's Capitol Shoe Hospital  
 D Perfection Dry Cleaners  
 E Owl Book Store  
 F Downtown Office Building  
 G State Bank of Burleigh County  
 H Trust Company  
 H First Federal Savings & Loan
- BLOCK 11**  
 A Northwestern Federal S. & L. Assoc.  
 B The Alex-Ruth Shop  
 Grand Pacific Beauty Shop  
 Vacant  
 North Dakota Education Assoc.  
 C Provident Life Office Building
- BLOCK 12**  
 A Burleigh County Courthouse
- BLOCK 13**  
 A Bismarck Hospital
- BLOCK 14**  
 A Family Practice Center  
 B Hospital Power Plant  
 C Mehus Conservatory of Music
- BLOCK 15**  
 Hospital Parking
- BLOCK 16**  
 A St. Alexius Hospital
- BLOCK 17**  
 A First Bank Drive-Up  
 B Apartments  
 C Trio Interiors  
 D Eckroth Music  
 E First Bank
- BLOCK 18**  
 A Vacant (former Bismarck Tribune)  
 B Bain Insurance Company  
 C Apartments  
 D Federal Office Building  
 E Meyer Broadcasting  
 Bismarck-Mandan Cable TV  
 Hoskin-Meyer Florist  
 Good News Books  
 Opgrand's  
 KFVR News Hot Line  
 F KYYR Radio  
 G Vacant  
 H Green Tree Square:  
 Prairie West Casuals  
 Superscissors  
 The Magic Dragon (children's books)  
 Ivy's Deli  
 I Buman Building -  
 Chancellor Square Offices  
 Health Shoppe  
 Anderson's State Fur  
 J Vacant (same as A)
- BLOCK 19**  
 A Dakota Northwestern Bank of Bismarck  
 Swans of the North (Scandinavian gifts)  
 Marna's (women's apparel)  
 Keen Travel Agency Inc.  
 B The City Center Plaza (retail and office space)  
 C Northwestern Bell Telephone Co.
- BLOCK 20**  
 A Q & R (Quain & Ramstad) Clinic (future City Hall)  
 B Deluxe Cleaners  
 Police Youth Bureau  
 Lenhart Rexall Drug  
 Benson's Optical  
 Sioux Sporting Goods Company,  
 C Kokkeler's Jewelry  
 D Vacant  
 E Nelsen Trading Post  
 Covered Wagon Bar  
 F Linssen's Hair Fashions  
 G Q & R Medical Library
- BLOCK 21**  
 A McDowell's Big Boy  
 B World War Memorial Building (recreational center)  
 C Bismarck Auditorium  
 D Rudrud Studio  
 E Bus Depot  
 F Q & R Clinic (future site)
- BLOCK 22**  
 A Vacant  
 B Office Building  
 C Ritterbush Office Building  
 D Roberts Floral and Plant Shop  
 E Paper Dollar Bar  
 F Minot Beauty and Barber Supply  
 G Delbert Barber Shop  
 H Mr. Donut  
 I Fritz & Al's Barber Shop  
 J Hindemith Tin Shop Inc.  
 K Vacant
- BLOCK 23**  
 A St. Mary's Elementary School  
 B St. Mary's Church  
 C St. Mary's Rectory  
 D Apartments  
 E One-Hour Martinizing  
 F Apartments  
 G St. Mary's Convent
- BLOCK 24**  
 ST. Alexius Hospital Parking
- BLOCK 25**  
 A Studio One Guitars  
 Murphy Insurance  
 Crotty Chiropractic Center  
 Purl 1  
 B Budget Tapes and Records  
 C Selfert Shoppe (gifts)  
 D Dakota Printing Company  
 E Wylie Music Company  
 F Star TV and Appliance  
 G Thomas TV and Appliance Co.  
 H Bill's Magnovox Home Entertainment Center  
 Guitarland  
 I Ken's Flower Shop  
 J Public Finance Corporation  
 K Tandy Leather Company  
 L Gas Station  
 M Law Offices  
 N The Prince Hotel  
 O Prince Hotel Lounge and Coffee Shop  
 P Bill Kunz Custom Tailoring  
 Q Advertising Inc.  
 R Uniform Center  
 S Town Crier Book and Card Shop  
 T May's Camera and Model Shop  
 U Bill Kunz Custom Tailoring
- BLOCK 26**  
 A Capital Trophy  
 Watkin Producer and Distributor  
 Gary's Gallery  
 Doug's Place of Hair Styling  
 Traffic Traffic  
 JVRR Advertising Association  
 B Maytag Home Appliance Center  
 C Vacant  
 D Art and Frame Shop  
 E Forever Green (plants)  
 F Woodmansee Stationery and Office Furniture  
 G Vacant
- BLOCK 27**  
 A Cowan Drug/Offices  
 Broadway Beauty Shop  
 Bismarck Optical Inc./Offices  
 B Vantage Point (men's apparel)  
 C Knowles Jewelry  
 D Apartments  
 E Coast To Coast Hardware Store  
 F Woolworth/Offices  
 G Josef's Hairstyling College  
 H The Golden Dragon (restaurant)  
 I Vacant  
 J Vacant  
 K Patterson Hotel  
 L Yes Virginia (gifts)  
 M Seeger's Fashion Center  
 N Lounge and Steak House  
 O Walkers N' Daughters Jewelry  
 P Shoe Hut  
 Q Uniquely Yours  
 R Betty's Beauty Den  
 S Westley's Jewelry Inc.  
 T Instant Printing
- BLOCK 28**  
 A Parkade Building -  
 University of North Dakota  
 Family Practice Center  
 Vacant  
 Charmee Beauty Palace  
 White Drug Store  
 B Beneficial Finance Company of North Dakota  
 J & R Vacuum Sales & Service  
 Bible and Book Store  
 Irene's Craft and Hobby Shop  
 Apartments  
 Gun City  
 C Record-Head  
 D American Appliance Company  
 E Vacant (former J.C. Penney Auto Center)  
 F Red Wing Shoe Store
- BLOCK 29**  
 Proposed Holiday Inn Site
- BLOCK 30**  
 A Bank of North Dakota  
 B Red Owl Store
- BLOCK 31**  
 A Olson's Service Station  
 B Andy's Super Service  
 C Klein Lumber Company
- BLOCK 32**  
 A Railroad Facility
- BLOCK 33**  
 A Conlin's Furniture  
 B Conlin's Carpet World  
 C OMF (office machines & furniture)  
 D Warehouse
- BLOCK 34**  
 A Midwest Coin and Antiques  
 Feist's Jewelry and Watch Repair  
 Flash Printing  
 B Italian Village Pizza  
 Dunahay's (art media)  
 C La-2 Boy Showcase  
 D Furniture City  
 E IDU Power Plant
- BLOCK 35**  
 A Burlington Northern Depot  
 B Warehouse
- BLOCK 36**  
 A Dakota Block-Dakota Real Estate  
 Waterbed  
 B Recruiting Station  
 C Front Page Tavern  
 Duke's Pizza  
 Village Square Trade Guild Shop  
 D Warehouse  
 E Same as D
- BLOCK 37**  
 Vacant
- BLOCK 38**  
 A Bismarck Lumber Company  
 B Beyer's Cement Inc.
- BLOCK 39**  
 A Phillips & Sons Company of North Dakota (liquor distributor)
- BLOCK 40**  
 A Signs of Bismarck  
 B Speedy Tire Center



# CENTRAL BUSINESS DISTRICT Bismarck, N OFFICE



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### Secondary Area

The Secondary CBD Study Area which surrounds the primary core consists of mixed land uses. To the south is the Kirkwood development area which includes the Kirkwood Plaza, the Kirkwood Motor Inn and the Kirkwood Office Tower. To the east and west of the CBD, primarily along Main Avenue, there are various older, highway oriented, commercial establishments which reflect the former use of Main Avenue as a major thoroughfare.

### Peripheral Retail Shopping Facilities

There are two major shopping center developments in Bismarck, both located on main access routes which extend from the Central Business District. North of the city at the intersection of U.S. Highway 83 and Interstate 94 is the Gateway Mall, an enclosed 324,320 square foot shopping center which opened in the spring of 1979. The total Gross Leasable Area (GLA) of the mall is 284,000 square feet. Two major department stores, Sears and A.W. Lucas Co. (a local department store), as well as several other tenants relocated to the Mall from the downtown. The other stores which relocated from the CBD were Osco Drug, Richmond Bootery (formerly Shoe Mart), Pied Piper, Lund Jewelry and Barker's. Two other tenants, Hansen's (menswear) and Cheddar Box, moved to the Gateway Mall from the Northbrook Shopping Center, a major neighborhood center. The Gateway Mall's four major tenants: A.W. Lucas Co., Osco Drug, Sears Roebuck and White Mart have a combined GLA of 198,000 square feet while the combined GLA for the 50 smaller tenants is 86,000 square feet.

Located within the southern boundary of the Secondary Central Business District Study Area is Kirkwood Plaza, an enclosed shopping mall. The mall is directly adjacent to the primary core, four blocks south of Main Avenue. Kirkwood Plaza opened in 1970 with a 433,118 square foot building, in the spring of 1980 an additional 479,882 square feet were added to the mall making the current total 913,000 square feet. The total Gross Leasable Area of the mall is 830,000 square feet. The department stores in Kirkwood Plaza are Montgomery Ward, J.C. Penney, Target, Woolworth's and Herberger's, their GLA is 448,000 square feet. The smaller tenants occupy 332,700 square feet combined. J.C. Penney and Richmond Bootery are the only tenants at Kirkwood which relocated from the CBD.



# C.B.D. STUDY AREA Bismarck, ND



## LEGEND

- |                                     |                               |                                    |                                  |
|-------------------------------------|-------------------------------|------------------------------------|----------------------------------|
| 1. Catholic Office of Education     | 15. Nastrom Motors            | 28. M.D.U. Power Plant             | 43. Kirkwood Super Valu          |
| 2. Bismarck Tire Center             | 16. First Bank                | 29. Civic Center Parking           | 44. Montgomery Ward              |
| 3. Veterans Memorial Public Library | 17. Dakota Northwestern Bldg. | 30. Bismarck Tribune               | 45. F.W. Woolworth Co.           |
| 4. Federal Offices                  | 18. City Center Plaza         | 31. Hardee's                       | 46. Target                       |
| 5. Professional Office Building     | 19. Q&R Clinic                | 32. Arthur Treacher's              | 47. J.C. Penney                  |
| 6. Medical Arts Building            | 20. Bismarck Auditorium       | 33. Burger King                    | 48. Village Inn                  |
| 7. Mid Dakota Clinic                | 21. Camp Hancock              | 34. Retail Shops                   | 49. Bismarck Chamber of Commerce |
| 8. Fleck House Motel                | 22. Holiday Inn Site          | 35. Bismarck Civic Center          | 50. Police Station               |
| 9. State Bank of Burleigh County    | 23. Bank of North Dakota      | 36. Burleigh Co. Housing Authority | 51. Kirkwood Motor Inn           |
| 10. Downtown Office Bldg.           | 24. Burlington Northern Depot | 37. David's Fine Foods             | 52. Kirkwood Park Apts.          |
| 11. Provident Life Ins. Bldg.       | 25. Bismarck Lumber Co.       | 38. Sherwin Williams               | 53. Kirkwood Office Tower        |
| 12. County Court House              | 26. Beyer's Cement Inc.       | 39. Sirloin Stockade               | 54. LaBelle's Showroom           |
| 13. Bismarck Hospital               | 27. Jensens Furn. Refinishing | 40. Village Inn Pizza Parlor       | 55. La Casa de Hamburguesa       |
| 14. St. Alexius Hospital            |                               | 41. Hardware Hank                  | 56. Bismarck Ave. Offices        |
|                                     |                               | 42. Mr. Steak                      | 57. Elks Club Lodge              |
|                                     |                               |                                    | 58. Herberger's                  |





Peripheral Commercial and Light Industrial Area



83

CBD

AREA OF STUDY

IND STATE CAPITOL  
HERITAGE CENTER  
PLAZA CENTER OFFICES

BISMARCK HIGH SCHOOL  
Avenue C  
Avenue D  
Avenue E  
Avenue F  
Avenue G  
Avenue H  
Avenue I  
Avenue J  
Avenue K  
Avenue L  
Avenue M  
Avenue N  
Avenue O  
Avenue P  
Avenue Q  
Avenue R  
Avenue S  
Avenue T  
Avenue U  
Avenue V  
Avenue W  
Avenue X  
Avenue Y  
Avenue Z

Halvick Avenue

BISMARCK TRIBUNE

BISMARCK CIVIC CENTER

SUPER VALU

7th Street

KIRKWOOD PLAZA

3rd Street

2nd Street

LAW ENFORCEMENT CENTER

KIRKWOOD OFFICE TOWER

BISMARCK AVENUE OFFICES

BURLINGHAM HOUSING ADMINISTRATION

KIRKWOOD MOTOR INN

WASHINGTON STREET

KIRKWOOD PARK APARTMENTS

BISMARCK AVENUE

ELKS LODGE

CASA DE BURQUESA

7/10/80

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There are three neighborhood centers in the city of Bismarck: Northbrook Shopping Center, Arrowhead Plaza and the K-Mart Shopping Center, which supply residents primarily with convenience goods. The Northbrook Shopping Center is located on North Washington Street, just southwest of the Highway 83 and Interstate 94 intersection. Northbrook is an 82,610 square foot enclosed mall, anchored by Red Owl and OK hardware. In addition, it has 33 smaller specialty shops.

Arrowhead Plaza, a strip center anchored by Scheel's Hardware and a Super Valu grocery, is located at 3rd Street and The Boulevard, north of the CBD. The K-Mart Shopping Center is located across Highway 83 opposite the Gateway Mall and consists of a Super Valu and K-Mart. A complete tenant list (as of July, 1980) for the shopping centers is included in Appendix C.

#### Multi-Tenant Office Buildings

At present, there are a number of multi-tenant office buildings in the downtown area of Bismarck. For purposes of this report, those described will be limited to the buildings that have a material impact on office space demand. The buildings include first-class, highrise buildings, as well as single-story buildings. They represent a diverse group, differing by location, age, size, quality, amenities and rental rate. These buildings contain a total of approximately 391,400 square feet of net rentable office space and represent the majority of space available in the downtown area. A complete inventory of those buildings in both the downtown and outlying area is included in Tables XIV and XV.

The table of Multi-tenant Downtown Office Buildings depicts pertinent statistical data concerning these buildings. Details regarding each of the buildings is included in the following discussion.

Dakota Northwestern Building: This six-story first-class building, the largest and one of the newest in the downtown area, was completed early in 1978. It is located in the heart of the downtown area at Fourth and Broadway. It offers amenities that include elevator service, retail shopping on its lower levels, and adjacent parking in the ramp. It enjoys a 95 percent occupancy level.



Professional Building: Although this three-story office building is about 30 years old, it still offers a well-maintained, up-to-date image with amenities that include an elevator, and nearby parking. The rental rate for space at the Professional Building reflects the quality of the building, but also takes into account that it is somewhat removed from the core business area. It is located at Fifth and Rosser.

Cowan Office Building: Floors two through five of this 1898 building house principally dental and medical offices. One of the upper floors was available for lease at the time of inspection. It is situated in the southeast section of the heart of downtown. It was added on to from 1954 to 1957 to its present height of five stories and offers the convenience of a drug store on the first floor.

Montana Dakota Utilities (MDU) Office Building: This building, adjacent to MDU's Bismarck headquarters, is predominantly occupied by the Montana Dakota Utilities Company and will be used for their future office space expansion. About 30 percent of this 20-year old building is occupied by tenants on short-term leases. Its moderate rental rate is in line with the amenities it offers and its location on the outer edge of the CBD.

Provident Life Building: This six-story, 26-year old building is located at Rosser and Fifth. The principal tenant is Provident Life; however, office space on its first and upper two levels has been leased to other tenants. Parking is available in one of three lots within a one-block radius of the structure. Its rental rate is on the upper scale of the spectrum, but the building is fully occupied.

Dakota Block Building: This office space is in a two-story building on the southeast corner of Fifth and Main. The building is over twenty years old and lower rental rates have attracted tenants so that it maintains 100 percent occupancy.

Downtown Office Building: This former Montgomery Ward store was converted in 1973 to office use. It is a three-story structure that offers modern first-class space at 314 Thayer Avenue, close to the heart of business activity in downtown Bismarck. The building is 100 percent occupied.



Parkade Building: The majority of office space in this building at Fifth and Broadway has recently been rented by the University of North Dakota Family Practice Medical Center. One attractive feature of this 1969 building is that it is a part of the city parking ramp complex. Its moderate rental rate has probably been a major factor contributing to its 100 percent occupancy level.

Ritterbush Building: This two-story office building was built in 1957 and provides office space for Ritterbush Associates and Bismarck's Planning Division offices. It is well-maintained and has off-street parking for visitors as well as tenants. It is located on the eastern side of the CBD on Seventh Street between Broadway Avenue and Thayer Avenue.

411 Professional Building: The 411 Fourth Street Red Owl store was converted in 1972 into this multi-tenant single-story office building. One of the amenities of this moderately-priced office space is easy access from the adjacent parking area. It presently is 80 percent occupied.

Buman Building: Located close to the heart of downtown Bismarck, the Buman Building contains three levels of office space. The first and lower levels have just been remodeled to accommodate small to mid-sized office users. The space is completely new and ready for occupancy. Its rental rate reflects this convenience and its prime location.

North Dakota Education Association (NDEA) Building: This attractive, well-maintained, two-story office building is located at 410 East Thayer, in the prime core area of the CBD. The building is over twenty years old, and is 100 percent leased. Parking is a limiting factor as tenants must find their own parking space. The rental rate is moderate.

City Center Plaza: The former J.C. Penney store at Fifth and Broadway is presently being converted into a retail-office center with an open two-story common area. Office space will be available at the City Center Plaza on the second floor. Information on rental rates was not available.



First Federal Savings & Loan Building: A limited amount of office space for tenants other than First Federal is offered in their building at Fourth and Rosser. The 17-year old three-story building is well-maintained and is 100 percent occupied.

In summary, downtown Bismarck has a rather extensive supply of older office space, most of which has been well-maintained. The newer first-class buildings have achieved high occupancy levels without diminishing the occupancy levels of the older properties.

TABLE XIV  
SELECTED MULTI-TENANT  
DOWNTOWN OFFICE BUILDINGS  
BISMARCK, NORTH DAKOTA

	<u>Year Completed</u>	<u>Total Rentable Sq. Ft.</u>	<u>Number of Stories</u>	<u>Occupancy Percent</u>	<u>Rate Per Sq. Ft.</u>
Dakota Northwestern	1978	103,000	6	95%	\$9.50+E
Downtown Office Building	Converted 1973	19,100	3	100%	\$7.00
Professional Building	1952	17,500	3	100%	\$6.25+E
Cowan Office	1898/1958	23,000	5	83%	\$5.00+J
*MDU Office Building	Before 1960	20,000	3	100%	\$5.75
*Provident Life	1954	45,600	6	100%	\$8.50
Dakota Block	Before 1960	22,000	2	100%	\$4.75
411 Professional Building	Converted 1972	7,200	1	80%	\$6.75
Buman Building	Old Buttrey's Converted 1980	10,000	2	30%	\$8.00-9.50
NDEA	Before 1960	9,100	2	100%	\$4.00-6.50
City Center Plaza	Converted 1980	45,000	2	0%	N/A
*First Federal S & L	1963	28,000	3	100%	\$8.00

\*Major tenant occupies 50 percent or more of building

E-Electrical

J-Janitorial

SOURCE: K. Bordner Consultants



TABLE XV  
OUTLYING MULTI-TENANT  
OFFICE BUILDINGS  
BISMARCK, NORTH DAKOTA

	<u>Year Completed</u>	<u>Net Rentable Sq. Ft.</u>	<u>Number of Stories</u>	<u>Occupancy Percent</u>	<u>Rate Per Sq. Ft.</u>
Kirkwood Office Tower	1975	40,000	6	100%	\$10.50+E, J
South Washington Office Building	1977	7,800	2	80%	\$7.10+E, J
Bismarck Avenue Offices	1972/79	24,800	2, 3	90%	\$6.50-7.00
Missouri Office Building	1976	20,500	2	100%	\$6.50
Capital Place Offices	1977	12,000	2	90%	\$8.50
Halkirk Building	1979	12,000	1	100%	\$8.50-9.50
Professional North	1974/79	14,400	2	93%	\$7.00-7.50
Randall Building	1969	19,140	1	100%	\$6.50-7.00
Russell Building	1975	28,710	1	100%	\$7.35
Frontier Building	1974	8,000	1	100%	\$7.50
Plaza Center	1971	13,600	2	100%	\$8.50

E - Electric  
J - Janitorial

SOURCE: Bordner Consultants

### Lodging and Restaurant Facilities

#### - Room Supply -

Our analysis of the lodging facilities in the Bismarck area reveals that there is a shortage of first-class hotel accommodations. Although there are several motels within the primary Central Business District Study Area, the CBD currently does not offer first-class lodging. First-class facilities in Bismarck are located from one-half mile to eight miles from the primary study area.

The shortage of first-class lodging facilities is particularly apparent as related to Bismarck's convention activities. According to Bismarck's Convention Bureau, in order to provide a sufficient number of rooms, delegates must be shuttled by bus to and from hotels located as far away as Mandan.



First-class hotels in the Bismarck area include: the Kirkwood Inn, located south of the primary CBD near the Civic Center; the Holiday Inn, west of the CBD along Memorial Highway; the Ramada Inn, along Interstate 94; the Town House Motor Inn, which is north of the State Capitol; and the Seven Seas Motor Inn, along Interstate 94 in Mandan. These five properties contain 924 rooms (see Table XVI on page 38).

In the past, the Prince Hotel served the needs of the Bismarck CBD, however, it is now over fifty years old and currently serves primarily as a rooming house. The Fleck House Motel, located immediately north of the CBD, is not included in the first-class category because of its small number of rooms and lack of amenities.

- Highly Competitive Hotels -

The Kirkwood Motor Inn is located along south Third Street, near the Bismarck Civic Center. After the addition of 145 hotel rooms and banquet and meeting facilities in 1978, the hotel was converted from a commercial house to a convention headquarters hotel. The Kirkwood has 310 rooms and is the largest hotel in Bismarck. It has extensive banquet facilities, seating as many as 1,500 guests in the Rhinehall and 500 guests in the Bavarian Room. In addition, it has several suites and private rooms located throughout the hotel for private business conferences. There are two attractive restaurants, Der Mark Dining Room for formal dining and the Kaffee Haus for lighter meals. In addition, Der Mark lounge has live entertainment nightly. The present room rate structure is as follows: Single \$33.50-38.00; Double \$39.50-44.00.

The Holiday Inn is a 260-room first-class hotel that has been developed in several phases. The most recent addition involved the construction of 94 hotel rooms and additional banquet facilities. Presently, a number of the older guest rooms and meeting spaces are being renovated. The Holiday Inn offers: indoor and outdoor recreation areas, two cocktail lounges, one of which provides live entertainment nightly; eleven meeting rooms ranging in seating capacity from 15 to 900 people; the Red Lion Dining Room for complete dinners; and a coffee shop. The present room rate structure is as follows: Single \$27.00-30.00; Double \$34.00-37.00.



The Ramada Inn is located at the intersection of U.S. Highway 83 and Interstate 94 and has excellent visibility to highway travelers. This 148 room first-class hotel is currently in the process of redecorating its guest rooms. It has a family restaurant, the Pancake Haus, a disco, and eight meeting rooms ranging in seating capacity from 10-300 people. Its present room rate structure is as follows: Single \$30.00; Double \$38.00.

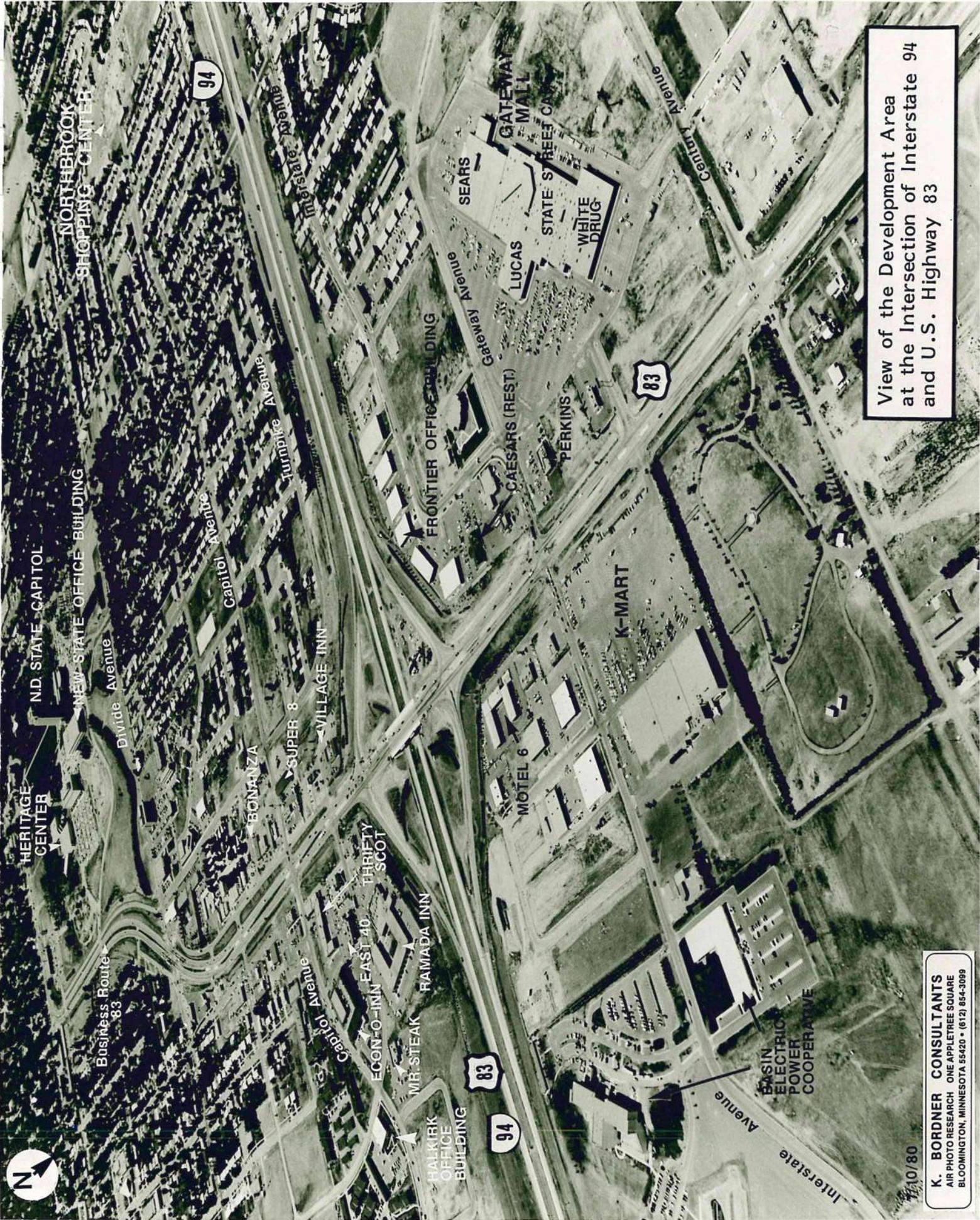
Seven Seas is a 105 room first-class motor inn located about six miles west of Bismarck along Interstate 94. As its name suggests, the Seven Seas uses a nautical theme throughout the facility. The Captain's Table is an attractive full service restaurant and the Port Hole Lounge provides live entertainment nightly. It has excellent banquet and meeting facilities seating up to 380 guests. Its rate structure is as follows: Single \$25.00; Double \$30.00-33.00.

The Town House Motor Inn is located near the State Capitol and provides 100 first-class hotel rooms. It has attractive dining in the Fireside Room, and the Ember Lounge provides live entertainment nightly. The banquet and meeting facilities accommodate groups of up to 350 persons. The room rate structure is as follows: Single \$30.00-31.00; Double \$35.00-37.00.

- Moderately Competitive -

The moderately competitive facilities include 333 rooms, all of which were constructed during the 1970's. Located near Interstate 94 are 275 rooms in three economy style motels: Econ-O-Inn, Super 8 Lodge, and the Thrifty Scot Motel. Within the Bismarck CBD is the Fleck House Motel, which has 58 rooms. The rooms provided in these facilities are primarily occupied by commercial travelers and vacationers; however, they are also currently supplying a significant number of rooms to convention delegates.





View of the Development Area at the Intersection of Interstate 94 and U.S. Highway 83

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10/180

- Somewhat Competitive -

The somewhat competitive facilities include 259 rooms in various properties scattered throughout Bismarck and Mandan (as listed in Table XVI). Primarily these are older, smaller facilities that provide accommodations for economy minded travelers and overflow rooms for Bismarck's larger conventions.

- Proposed Hotel Facilities -

Our fieldwork indicated that Holiday Inn is planning to develop a 150-room first-class hotel in the Central Business District Study Area. The facility would be located on an urban renewal site at Main Avenue and Seventh Street. Reportedly, construction for this facility is scheduled to begin in the fall of 1980. Field research also revealed that there is some question about the continued existence of the Patterson Hotel building.

- Current Room Usage -

Occupancy in the Bismarck-Mandan lodging facilities varies widely according to location and individual properties. Highly competitive hotels have annual occupancies of 60-75 percent. These properties attract a substantial segment of the commercial, convention and leisure business. Moderately competitive properties have annual occupancies of 65-80 percent. These budget-style operations offer few amenities and are primarily for economy-minded travelers. For many of the larger conventions, these budget-style operations are providing a significant number of rooms to individuals who would otherwise stay in first-class facilities. The somewhat competitive properties have annual occupancies of 60-75 percent. These facilities include smaller properties scattered throughout the area and are dependent on over-flow from the highly and moderately competitive properties.



TABLE XVI  
SUPPLY OF COMPETITIVE ROOMS  
BISMARCK, NORTH DAKOTA

Name	Estimated Occupancy (Percent)	Number of Rooms	Year Built	Room Rates		Location	Amenities
				Single	Double		
<u>VERY COMPETITIVE</u>							
Kirkwood Motor Inn (Best Western)	70-75%	165/145	1974/1978	\$33.50-38.00	\$39.50-44.00	S	R, CL, IP, MR, E
Holiday Inn	68-75%	108/59/94	1962/67/73	27.00-30.00	34.00-37.00	W	R, CL, IP, MR, E
Ramada Inn	65-68%	148	1974	30.00	38.00	N	R, CL, IP, MR, E
Seven Seas (Best Western)	60-65%	105	1972	25.00	30.00-33.00	W'	R, CL, IP, MR, E
Town House Motor Inn (Best Western)	65-70%	100	1970	30.00-31.00	35.00-37.00	N	R, CL, IP, MR, E
		<u>924</u>					
<u>MODERATELY COMPETITIVE</u>							
Econ-O-Inn	75-80%	103	1976	16.50	20.50-22.50	N	
Fleck House Motel (Best Western)	65-70%	58	1971	21.00	26.00	N	OP
Super 8 Lodge	80-85%	60	1976	16.88-19.88	20.88-27.88	N	
Thrifty Scot Motel	70-75%	112	1976	15.90-21.90	22.90-24.90	N	OP
		<u>333</u>					
<u>SOMEWHAT COMPETITIVE</u>							
Colonial	65-70%	38	1960's	14.50	18.50	W'	OP, LS
Lewis & Clark Hotel	60-65%	70	1918	14.00-20.00	22.00-26.00	W'	R, CL, MR
Modern Frontier Motel 6	70-75%	50	1960's	16.00	20.00	W'	OP
	65-70%	101	1974	11.95	14.95	N	OP
		<u>259</u>					
TOTAL		<u>1,516</u>					

KEY TO AMENITIES: R-Restaurant; CL-Cocktail Lounge; IP-Indoor Pool; OP-Outdoor Pool; MR-Meeting Rooms; E-Entertainment; LS-Liquor Store

LOCATION: CBD-Central Business District; N-North; S-South; E-East; W-West; W'-MANDAN

SOURCE: K. Bordner Consultants



- Market Segmentation -

The Bismarck area hotel market presently has an estimated annual demand of 390,000 room-nights. Factors contributing to the market mix include the style of operation, location and room rates. Based on interviews with various officials, hotel operators and our analysis of the market demands, we have estimated the composition of present room demand as follows:

ESTIMATED MARKET MIX

<u>Market Segments</u>	<u>Percentage</u>
Commercial	53
Convention	23
Leisure	<u>24</u>
	100%

- Restaurant Supply -

Presently there are thirteen restaurants in the area that are considered to be first-class establishments. These include six free-standing restaurants, five hotel restaurants, and two mall restaurants.(see Table XVII on page 41).

The Golden Dragon is located in the CBD. It offers full service dining and carry-out, from a menu which includes Chinese and American entrees. In addition, Polynesian drinks are considered a specialty of the bar.

Der Mark located at the Kirkwood Motor Inn incorporates a Bavarian theme throughout the restaurant with the use of medieval tapestries, massive leather-covered chairs and hardwood tables. Der Mark is noted for its award-winning popovers served with every entree and their special Sunday gourmet brunch.

The Red Lion Dining Room at the Holiday Inn is an attractive restaurant offering fine Continental-American cuisine. The specialties of the house include various steak and seafood selections.



The Fireside Dining Room located in the Townhouse Motor Inn offers a relaxing atmosphere that is especially popular among the business community. The house specialty is barbecued ribs, in addition the menu features seafood and steak.

The Captain's Table dining room at the Seven Seas Motor Inn uses a nautical motif. Since the motel is located on top of a hill, the dining room has a panoramic view of the Mandan countryside. The specialties of the house include South American-style steak and a large variety of seafood entrees.

The Pancake Haus is located at the Ramada Inn. It is an attractive restaurant that serves all meals. As its name suggests, the restaurant offers a wide variety of moderately priced pancakes and waffles as well as steak and sandwich selections.

The Chapter 1 is located north of the Gateway Mall and recently reopened under new management. Collections of books line the walls, creating a library decor. The books also serve to partition the restaurant into intimate eating areas. The menu features a variety of steak and seafood entrees.

Located near the Convention Center, David's Fine Foods is an elegant restaurant with dining areas on two levels. Both the main floor and second dining level have luxurious atmospheres and provide guests with gourmet specialties such as Beef Wellington and Long Island Duckling.

The East 40 is located adjacent to the Ramada Inn, the Thrifty Scot and the Econ-O-Inn. It offers a unique turn of the century atmosphere which includes authentic antiques, stained glass windows and a fireplace. The menu includes a complete offering of steak and seafood entrees.

The Gourmet House is a fine-dining facility located in Mandan. Its unique decor includes crystal chandeliers, numerous oil paintings and a display of antique cars. The menu features steak and seafood specialties such as prime rib and lobster.



TABLE XVII  
SUPPLY OF RESTAURANTS  
BISMARCK AREA

<u>Restaurant Name</u>	<u>Location</u>	<u>Type of Menu</u>	<u>Dinner Price Range</u>	<u>Entertainment</u>
<u>Hotel and Motor Inn Restaurants</u>				
Kirkwood Motor Inn - (Der Mark)	800 S. 3rd St. Memorial Highway	American Continental - American	\$6.95-12.95	In Lounge
Holiday Inn - (Red Lion)		American	5.95-11.75	In Lounge
Ramada Inn (Pancake Haus)	1400 E. Interchange Ave.	American	4.75- 7.95	Disco
Seven Seas - (Captain's Table)	1823 Old Red Trail	American	5.50-11.50	In Lounge
Town House - (Fireside)	1800 N. 12th St.	American	5.25-12.95	In Lounge
<u>Free Standing Restaurants</u>				
Chapter 1	1100 Wiess Ave.	American	5.95-12.00	None
David's Fine Foods	600 South 3rd St.	American	6.95-11.95	None
Gourmet House	4614 Memorial Highway	American	7.25-15.50	None
La Casa de Hamburguesa	401 East Bismarck Ave.	Mexican	2.95- 6.95	In Lounge
The East 40	1401 Interchange Ave.	American	6.56-13.50	None
The Golden Dragon	410 East Main	Chinese	2.95- 7.95	None
<u>Mall Restaurants</u>				
State Street Cafe	2700 State Street	American	4.00- 9.95	None
The Wok	1929 N. Washington	Chinese	3.75- 8.95	None

SOURCE: K. Bordner Consultants



Located south of the Kirkwood Plaza is La Casa de Hamburguesa. The interior combines Mexican handicrafts and American antiques, which provide an informal atmosphere. The menu includes a complete offering of modest-priced Mexican entrees and a limited number of American entrees. Pina Coladas and Margaritas are considered to be specialties of the bar.

The State Street Cafe, located in the Gateway Mall, is open for breakfast, lunch and dinner. It is an attractive restaurant with an informal, country atmosphere. The menu features omelettes, seafood, steak and sandwich selections.

In the Northbrook Shopping Center is The Wok restaurant. The decor includes various oriental artifacts which help to create an elegant Chinese atmosphere. The menu offers sixty-eight different Chinese meals prepared by a master chef of Cantonese cooking.

- Demand Generators -

Convention activity - The Bismarck Civic Center, located immediately south of the CBD, is a modern and attractive facility. The civic center is used for many events and can accommodate up to 8,000 people. In addition, the Bismarck City Auditorium, on the corner of 6th Street and Broadway Avenue, provides meeting facilities for various groups with a seating capacity of 900 people. Trends in Bismarck's convention activity provide an indication of room demand for such events.

There has been a substantial growth in convention activity during the past nine years with delegate attendance increasing 116 percent, which represents a 12.8 percent annual average growth rate. In 1974, attendance increased 43.1 percent over the previous year. This was the same year that 414 new hotel rooms were added to the supply. During the 1970's, Bismarck became a convention center of regional significance, although conventions and meetings of state-wide scope have been the primary source of activity. The following table displays convention activity for the period 1970 through 1979.



**TABLE XVI**  
**CONVENTION ACTIVITY**

<u>Year</u>	<u>Number of Conventions</u>	<u>Attendance</u>
1970	144	35,885
1971	182	32,483
1972	178	37,470
1973	185	34,745
1974	252	49,735
1975	264	50,780
1976	276	56,025
1977	351	62,316
1978	429	74,558
1979	391	75,945

SOURCE: Bismarck Convention Bureau

Airport Activity - Bismarck Municipal Airport is located approximately two miles south of the Central Business District. The main terminal was built in 1965 and served over 370,000 commercial passengers last year. During the past five years, total enplanement and deplanement of commercial passengers increased at an average annual rate of 18.7 percent. Currently, five commercial airlines; Air Wisconsin, Big Sky, Frontier, Northwest and Republic provide thirty-five daily flights. The enplanement/deplanement figures are shown in the following table.

**TABLE XIX**  
**ANNUAL AIRPORT ACTIVITY**  
**BISMARCK MUNICIPAL AIRPORT**

<u>Year</u>	<u>Number of Passengers</u>	<u>Annual Percentage Increase (Decrease)</u>
1970	110,573	
1971	140,407	27.2
1972*	133,322	(4.8)
1973	164,585	23.6
1974	192,640	14.5
1975*	204,438	5.7
1976	240,399	14.3
1977	271,498	12.7
1978*	257,694	(4.5)
1979	372,594	45.1

\*Northwest Airlines Strikes

SOURCE: Bismarck Municipal Airport Manager



Tourist Attractions - The City of Bismarck offers a variety of recreational facilities. It has 30 parks comprising 1,421 acres of historic and scenic landscapes as well as two public golf courses and one private country club. The Dakota Zoo, which has an extensive collection of animals, is located along the Missouri River in the southwestern portion of the city. Fort Lincoln State Park, located on the western bank of the Missouri River in Mandan, is a scenic historic site which offers camping and picnic facilities. Other attractions include: The State Capitol Building, North Dakota Historical Society Museum, Camp Hancock Museum, Bismarck-Mandan Symphony Orchestra, Capitol City Speed Way, the Mandan Rodeo Grounds, and the Beck Great Plains Museum.

- Room Demand -

Current Demand - Demand for hotel facilities in the Bismarck area falls into three categories: commercial travelers, convention delegates and leisure travelers/tourists. The commercial segment provides a large demand for rooms from Monday through Thursday; there is also some demand from this group for rooms on Fridays and Sundays. Travelers in this segment commonly prefer to be in hotels which have large attractive rooms, restaurant and bar facilities as well as convenient on-site parking.

Convention delegates and groups come to Bismarck for various types of meetings including seminars, business gatherings and annual conventions. These visitors typically prefer to stay at larger headquarters-type hotels which can accommodate large groups and provide suitable facilities, as well as being located near shopping, restaurants and entertainment.

The leisure segment includes both those enroute to other destinations as well as those visiting Bismarck specifically. The summer months, holidays and weekends are the peak periods for these travelers. This segment typically includes price-conscious travelers that prefer facilities near highways. Important amenities include swimming pools, recreation centers and coffee shops.



The Bismarck area hotels have an annual demand of 390,000 rooms, we have estimated the composition of present room demand as follows:

TABLE XX  
SIZE AND COMPOSITION OF CURRENT DEMAND

<u>Market Segments</u>	<u>Estimated Annual Room Nights (1979)</u>	<u>Percentage</u>
Commercial	205,000	53%
Convention	91,000	23%
Leisure	<u>94,000</u>	<u>24%</u>
TOTAL	390,000	100%

SOURCE: K. Bordner Consultants

Future Demand - The room demand in Bismarck is expected to be influenced by the anticipated growth of the area's coal industry and other energy related-endeavors. The growth trend data in Part Three of this report is also an indicator of the Bismarck-area growth which can be a factor in the level of demand for lodging facilities. Based on estimated growth rates for the three sources of hotel business, we have projected room demand for the next three years in the following table.

TABLE XXI  
ESTIMATED ANNUAL DEMAND - ROOM NIGHTS

<u>Segment</u>	<u>Average Annual</u>				
	<u>1979</u>	<u>Growth Rate</u>	<u>1980</u>	<u>1981</u>	<u>1982</u>
Commercial	205,000	7%	219,000	235,000	251,000
Convention	91,000	5%	96,000	100,000	105,000
Leisure	<u>94,000</u>	3%	<u>97,000</u>	<u>100,000</u>	<u>103,000</u>
TOTAL	390,000		412,000	435,000	459,000

SOURCE: K. Bordner Consultants

- Supply-Demand Analysis -

We have identified thirteen properties in the Bismarck-Mandan area which are either very competitive, moderately competitive or somewhat competitive. They have 1,516 available rooms in various price categories. Nine of these properties have been built in the 1970's while some are at least twenty years old. For example, the Holiday Inn (old section) will be twenty years old in the Spring of 1981; however, plans are underway to update this hotel, reportedly at a cost of



approximately one million dollars. Only five properties contain first-class rooms as well as restaurant-banquet facilities and related amenities. The Bismarck Convention Bureau is forced to place visiting delegates in distant hotels that do not provide restaurants, bars and meeting facilities, or that are located in distant parts of the Bismarck area.

The table on page 38 lists the supply of competitive hotels and shows their estimated occupancy rates. The occupancy rates of many properties are indicative of the high demand and limited supply.

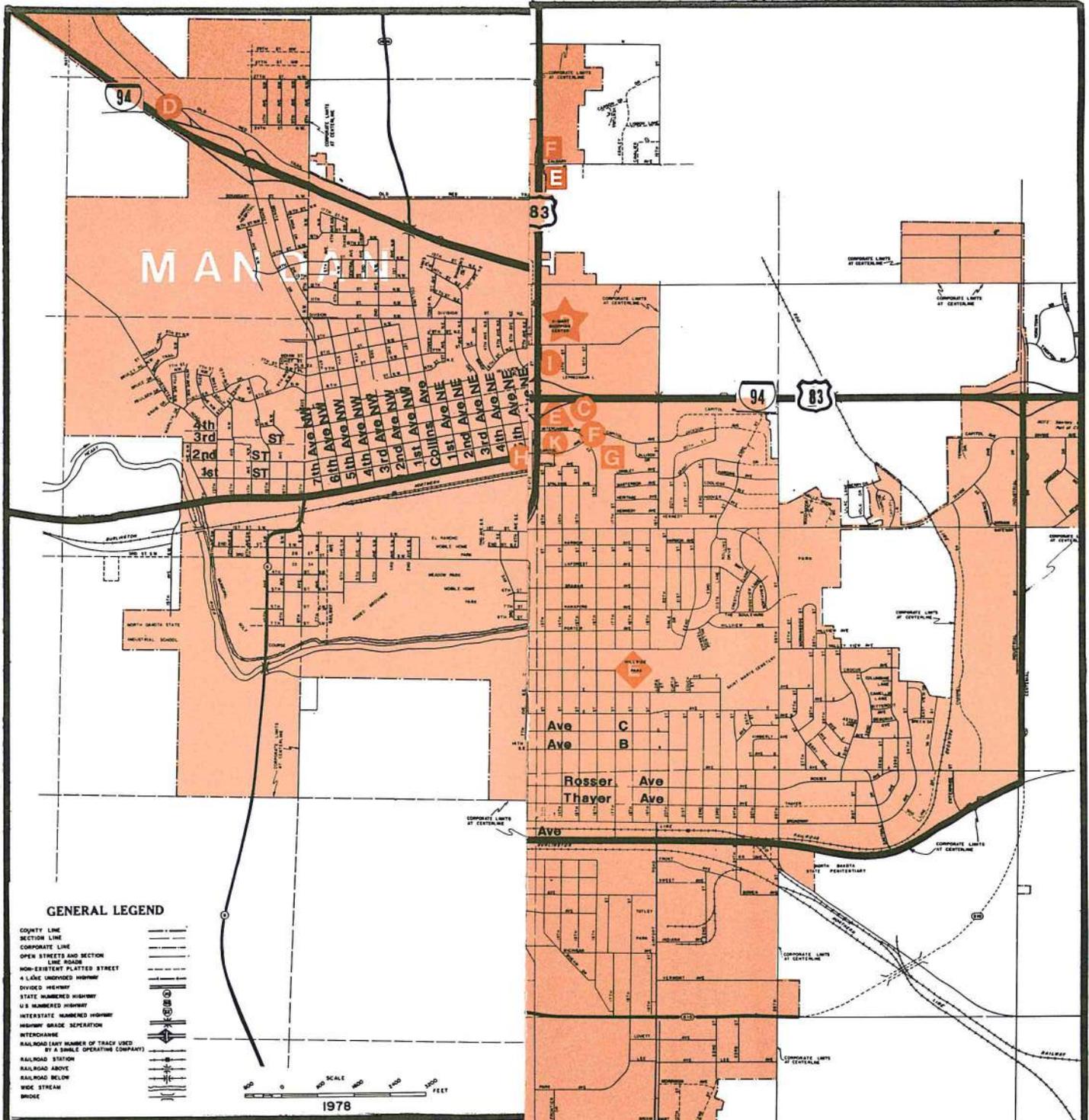
The development of a first-class hotel within the Central Business District would have excellent access to the Bismarck Civic Center, reduce the distance and cost involved in transporting delegates and provide the CBD with additional economic activity. Bismarck's ability to attract a greater number of groups with larger attendance could be expected to improve with a new hotel.

- Restaurant Supply-Demand Analysis -

Only one of the thirteen restaurants considered to be first-class is located in the CBD. This lack of first-class restaurants in the CBD has made it necessary for many businesspeople, convention delegates, and other travelers to leave the CBD to find suitable dining facilities. Groups and individuals desiring attractive facilities within the CBD for luncheons, receptions, and banquets are additional sources of demand.

Although the restaurant in a first-class hotel in the CBD would add to the supply, development of the related hotel rooms would probably also contribute to the need for additional downtown first-class restaurants.





# BISMARCK - M

- HOTELS/MOTELS**
  - A. Kirkwood Motor Inn - Der Mark Dining Room
  - B. Holiday Inn - Red Lion Dining Room
  - C. Ramada Inn - Pancake Haus
  - D. Seven Seas (Best Western) - Captains Table Dining Room
  - E. Town House Motor Inn (Best Western) - Fireside Dining Room
  - F. Econ-O-Inn
  - G. Fleck House Motel (Best Western)
  - H. Lewis and Clark Hotel
  - I. Motel 6
  - J. Super 8 Lodge
  - K. Thrifty Scot Motel
- ★ RETAIL S**
  - A. Kirkwood
  - B. Gateway
  - C. Arrowhea
  - D. K-Mart S
  - E. Northbro
- ▲ RESTAUF**
  - A. Chapter
  - B. David's F
  - C. Gourmet
  - D. La Casa
  - E. The East
  - F. The Gold

## PART EIGHT - ANALYSIS AND RECOMMENDATIONS

The Central Business District of Bismarck is an active and growing area. This is a direct result of increasing activity in much of the economy as described in the foregoing analysis. The Central Business District is presently anchored at the northeast by the extensive medical complex described earlier and by the Kirkwood development complex on the south. The proposed Holiday Inn will provide a further anchor on the east. Major hotels with their attendant services function as especially good downtown anchor developments. They not only draw potential consumers and clients into the CBD area but supply amenities (restaurant, lounge, meeting rooms) which provide a service to existing businesses and personnel within the area.

### Hotel and Restaurant Analysis

Our study indicates that the CBD of Bismarck appears to have a significant need for new first-class hotel and related restaurant facilities. Based on our projections of room demand, growth and penetration of outlying properties, we estimate the need for about 400 new hotel rooms. If the anticipated growth in energy-related enterprises develops more rapidly, additional room needs in the commercial segment will arise.

A new Holiday Inn of 150 rooms is planned on a vacant urban renewal site at Seventh Street and Main Avenue and will fulfill a portion of the room demand, however, an additional first-class hotel of about 250 rooms will be needed, which together with the proposed Holiday Inn, parking ramp and other CBD developments will contribute to the revitalization of the CBD business core, as well as create 300 to 400 employment opportunities.

Currently, there is a shortage of first-class restaurants in the Bismarck CBD, including those operations which are located within hotels as well as free-standing restaurants. This lack of fine restaurants is causing the restaurant clientele to travel out of the CBD to find suitable dining facilities. Development of a restaurant in the proposed Holiday Inn and the planned conversion of the Amtrak Depot into a restaurant are therefore necessary and desired additions to the Central Business District. These developments should be set in an ex-



ceptional environment which includes landscaping and adequate parking facilities, preferably under an inclement weather shelter. Consideration should also be given to an enclosed pedestrian skyway system connecting these developments with other downtown facilities.

- Rooms and Room Mix -

We recommend a corporate-style hotel for the CBD of about 250 rooms and expansion capabilities for another 100 rooms as demand develops. Moderate size meeting and banquet facilities should be also included in the development since the hotel should be prepared to host small groups or conventions. These facilities should connect via a pedestrian skyway system to the office building, specialty retail, parking and the Dakota Northwestern Bank office building which serves as the new office core of the CBD. The Kirkwood Inn presently serves as headquarters to the larger conventions because it has large meeting and banquet facilities, although it has been dividing larger conventions with the present Holiday Inn since it lacks the necessary guest rooms. In consideration of the existing room supply and expected demand, the following room-mix is suggested for the recommended 250-room hotel.

TABLE XXII  
ROOM MIX

Room Type	Number of Rooms	Number and Type of Beds	Approximate Square Feet	Description
A	100	1 Queen	300	Executive
B	120	2 Queens	360	Family, Poolside
C	18	2 Queens & 2 Day Beds	720	9 Suites with wet bars & bedroom
D	6	2 Day Beds	750	Hospitality Suites
E	2	1 Large Round Bed	360	Honeymoon Suites
F	4	2 King Size Beds	750	Penthouse Suites with apartment facilities

SOURCE: K. Bordner Consultants

An attractive group of restaurant and bar facilities should greatly enhance the hotel operation. Ready access to the restaurants and bars should be provided to patrons entering the hotel via the lobby. Two suggested types of hotel restaurants follow. A casual restaurant-pub on the street level could appeal to those desiring a quick lunch, with a variety of sandwiches and soups. An estimated 100-125 seats would be needed for this establishment. In addition to the casual restaurant-pub, we suggest an attractive bar of about 125-150 seats where entertainment, including western music, will be provided three or four nights per week.



A more formal gourmet type restaurant with about 150 seats serving specialty cuisine and providing an attractive intimate decor is also suggested. In addition, soft, semi-classical piano or violin music should be considered for this restaurant.

- Banquet and Meeting Facilities -

Since about 25 percent of the estimated hotel guest patronage would include convention delegates, special attention must be given to the character and size of the banquet and meeting facilities. Moderate-size convention facilities located on the second floor would comprise a flexible assembly area that could also be included in the main ballroom. Space for storage, a cloak room, restrooms and a banquet/kitchen would be needed, as well as adequate elevator facilities. A second level pedestrian skyway connector to other blocks in the CBD would then make catered meetings very desirable for tenants within those connected blocks. The following chart displays the size and type of banquet and meeting facilities that are considered appropriate for the recommended hotel.

TABLE XXIII  
BANQUET AND MEETING ROOMS

	Approximate Size Square Feet	Seating Capacity	
		Banquet	Meeting
Ballroom:divisible into six parts	5,000	500	600
Ballroom I <sup>(1)</sup>	1,250	125	150
Ballroom II <sup>(2)</sup>	1,250	125	150
Ballroom III	1,250	125	150
Ballroom IV	1,250	125	150
Assembly Area <sup>(2)</sup>	1,500	150	175
Meeting Room A <sup>(3)</sup>	1,000	100	125
Room 1	500	50	60
Room 2	500	50	60
Meeting Room B <sup>(3)</sup>	1,000	100	125
Room 1	500	50	60
Room 2	500	50	60
TOTAL	8,500	850	1,025

<sup>1</sup>Ballrooms I and II can each be subdivided into two smaller rooms.

<sup>2</sup>Assembly area has movable wall and can be added to the main ballroom.

<sup>3</sup>Meeting Rooms A and B can each be subdivided into two smaller rooms.

SOURCE: K. Bordner Consultants



## Retail Development Analysis

The relocation of major department stores from the CBD core area to outlying centers has virtually ended the historic role that the downtown area has played as the major provider of shoppers goods and department store-type merchandise to the trade area consumer. These department stores had been the anchors around which the downtown formed and upon which it relied for consumer drawing power in Bismarck and other communities. As previously discussed in this report, these anchors are being replaced by other major users; office, medical, and financial; and it is not anticipated that a major department store will relocate in the CBD at the present time.

In an active business district, the consumer traffic on which retail and service stores depend, will continue to exist. However, both shopping habits and demand for goods and services can be expected to change as the character of the downtown consumer changes.

An increase in downtown office employment can, for instance, generate increased demand for restaurants able to capitalize on lunch trade. The development of downtown hotel facilities is expected to provide demand for other meals as well, which may in turn result in new and/or expanded restaurant facilities.

Similar scenarios can be drawn for specialty retail shops which can capitalize on increased downtown office employment, tourism, and convention traffic, as well as the local markets. A primary consideration of small retail store developments is that they be in a position to intercept and be visible to downtown pedestrian traffic.

We recommend the future development of specialty retail store space in connection with other development, especially in locations where it can take maximum advantage of existing and future downtown traffic, employment and convenient parking.

### -Recommended Development Site-

A parcel of land located in the CBD consisting of two city blocks, (Blocks #26 and #27 as shown on the CBD occupancy map on page 27) bordered by Main and Broadway Avenues and Third, Fourth and Fifth Streets has been examined for its development potential for a hotel complex that might also include office and retail facilities. This site is accessible to the Civic Center, commercial and



corporate businesses, government offices, medical facilities and other demand generators. The two blocks are each 300 feet square, providing 180,000 square feet of space including the two alleys (5,000 square feet each). The topography is level and all utilities are available.

At the present time, block #26 consists primarily of vacant land owned by the City of Bismarck as well as the former Lucas Department Store and First National Bank buildings. The City owns nine of the block's 24 lots, or approximately one-third of the block (33,000 square feet). In order to redevelop this block, the remaining individual properties would have to be acquired and the existing buildings cleared. It appears there would be less difficulty and expense for the City to acquire the remainder of the property on this block than to acquire other blocks in the CBD area, since the acquisition process has been started on this block.

Block #27 could provide additional land for expansion. At the present time, the block consists of a group of small retail shops, as well as Woolworth's and the Cinema Theatre. There is also some vacant store space and an old Hotel facility, the Patterson Hotel, on the block. (See map on page 27 for complete occupancy).

### Access

The primary consideration in transportation changes must be the improvement of access into the primary central business area. The loop road presently under construction will greatly enhance overall traffic patterns within the city and improve access to the southern portion of the Secondary Study Area along Bismarck Avenue, including Kirkwood Plaza. An indirect impact may possibly be the reduction of traffic congestion on Seventh and Ninth Streets and on Main Avenue in the core area.

Future attention must be given to the improvement of north-south access through the city and into the core area of the CBD. Any such improvements would ideally connect the growing northern and southern residential areas of the city and Interstate 94 with the core area. Convenient and direct access is one of the basic requirements of any business-commercial location; the Bismarck Central Business District is no exception.



Within the Study Area itself, improvements in access between the core area and the south area (Kirkwood complex) must be effected. Serious study should be given to the possibility of grade separations at the railroad crossings of both 3rd and 5th Streets. The future success of the CBD will depend to a great extent on the ability of major developments on opposite sides of the railroad tracks to interact with one another.

#### Visibility, Beautification and Visual Impact

The visual impact of a business area on both the out-of-town guest and the local resident should be a primary consideration in all future plans. This extends beyond the redevelopment of any blighted or aged areas. The visibility of major CBD developments to each other should be considered when determining the location of new anchor developments.

Beautification efforts, such as those which were begun with the Chancellor Square Mall, should continue to be pursued. Private developers should be encouraged by the city to include appropriate plantings, benches, and other aesthetic elements in their plans. Particular attention should be given to the major approaches into the CBD, especially along Main Avenue between 3rd and 6th Streets, to help counteract the negative visual effect of the railroad and improve the image of the entire CBD. Open areas, plantings, plazas, and the visibility of anchor developments all are integral parts of the total visual impact of the downtown area on the incoming consumer.

#### Other Recommendations

Parking facilities will be necessary within the CBD Primary Study Area as demand continues to develop. Both public and private ramps, as well as surface lots, will need careful consideration as new development contributes to an increase in downtown traffic. One of the blocks for consideration should be the block occupied by the Prince Hotel, which would serve the parking needs west of the CBD. As described earlier, the redevelopment of the historic railroad depot into a restaurant is an encouraging sign for the improvement of the area along the railroad tracks.



Further attention, however, must be paid to the other aging structures both east and west of the Depot.

The development of multi-use complexes, such as the one recommended earlier, should be strongly encouraged by the city. Developments of this type create interaction between their various elements which contributes to the success of each over and above the expectation for freestanding, unconnected structures.

In addition, such multi-use complexes become major anchor elements within an area. In the same manner in which differing uses within one development interact to the benefit of each other, the interaction between anchor elements within the CBD not only operates to their own benefit but also to the areas between them through which traffic passes. The diagram of potential movement patterns on page 57, indicates the areas of future interaction that could exist should the Holiday Inn proceed as planned and the recommended multi-use hotel-office complex be developed.

The redevelopment of the "south tracks" area, between the railroad and the Kirkwood complex, into more attractive business uses would have two effects. First, it would enhance the overall visual environment of the CBD area and second, it would help to tie together the core area with the Kirkwood Plaza and Motor Inn. Traffic and pedestrian flow patterns that could be created, as shown on the accompanying diagram, would enhance the desirability of the south tracks area for new development. Note, that although separated from the core area by the railroad tracks, much of the south tracks area property would be centrally located between the major anchor elements of the CBD, and in close proximity to the Civic Center. This area is essentially equidistant from all other major traffic generators. As the recommendations within this report are implemented, the private development sector may eventually find this area to be as desirable as the extreme southern edge of the study area along Bismarck Avenue.



Today, Central Business Districts in cities of all sizes, are encouraging downtown residential housing. These housing facilities include highrise condominiums, apartments and subsidized housing units. The City of Bismarck should encourage and provide all possible support for public and private plans for such development.

Because the climate of central North Dakota includes both hot, humid summers and cold winters, the development of an enclosed skyway systems is highly desirable and can have the added benefit of increasing the utilization of second floor space. The development of a complete system connecting several blocks is more probable in a compact centralized core area than in a business district that has been allowed to spread over a large area. In view of this, the city of Bismarck should discourage the emigration of major core area-businesses into the surrounding Secondary Study Area. Development of multi-family housing and supportive service and commercial facilities should be encouraged within the secondary area. In summary, the first priority of the city should be, in our opinion, the encouragement of the development of major multi-use anchor developments in the CBD. Business activity, traffic and consumer demand generated by such developments will be beneficial to the CBD as a whole and will in themselves provide the impetus for further development.

•                   •                   •                   •                   •

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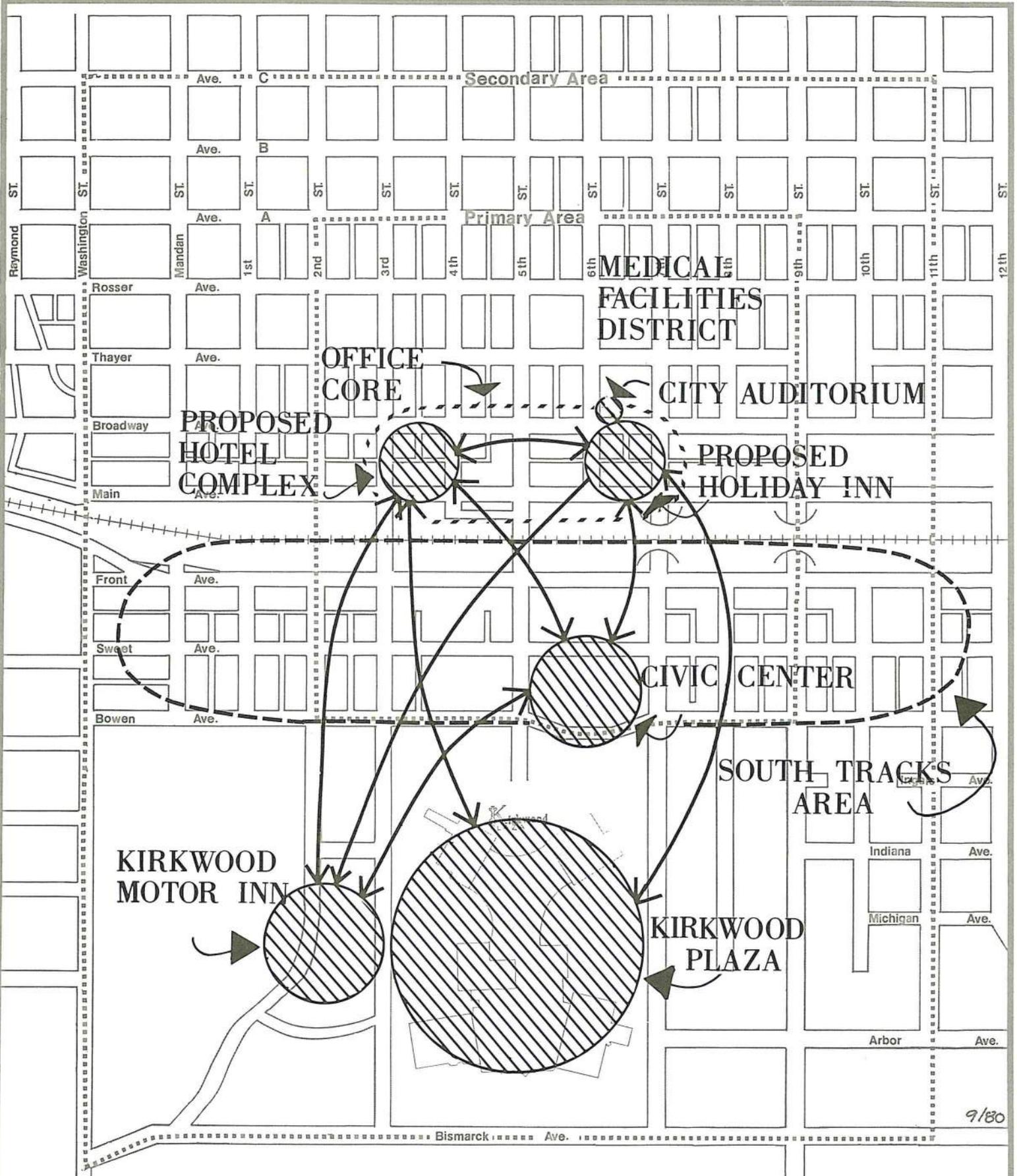
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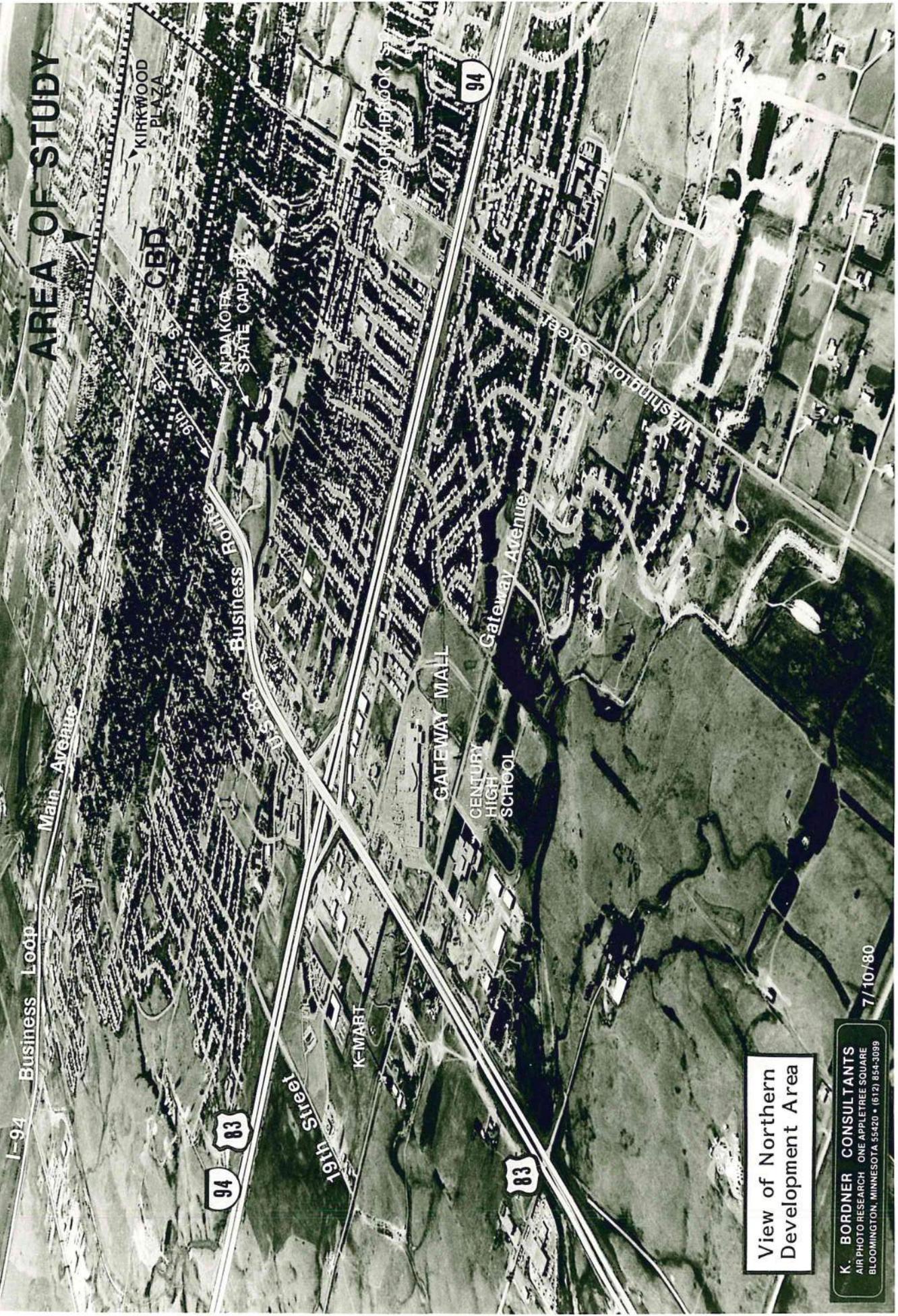


**Potential Transient Movement Patterns  
Bismarck, N. D.**



BISMARCK MUNICIPAL AIRPORT

# AREA OF STUDY



I-94

Business Loop

Main Avenue

KIRKWOOD PLAZA

CBD

94 83

Business Route

19th Street

K-MART

GATEWAY MALL

CENTURY HIGH SCHOOL

83

Gateway Avenue

Washington Street

94

View of Northern Development Area

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7/10/80



83

94

MUNICIPAL GOLF COURSE

GATEWAY MALL

YMCA

ND STATE CAPITOL

83 94

AREA OF STUDY

11th Street

CBD

KIRKWOOD PLAZA

DAKOTA ZOO

RIVERWOOD GOLF COURSE

Main Avenue

Business Loop

13th Street

14th Street

15th Street

16th Street

17th Street

18th Street

19th Street

20th Street

21st Street

22nd Street

23rd Street

24th Street

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87th Street

88th Street

89th Street

90th Street

91st Street

92nd Street

93rd Street

94th Street

95th Street

96th Street

97th Street

98th Street

99th Street

100th Street

Bismarck Avenue

Wachter Avenue

Washington Street

Expressway

TO AIRPORT

View of Southern Development Area

7/10/80

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APPENDIX A  
ECONOMIC INDICATOR COMPARISON REPORT  
BISMARCK, NORTH DAKOTA  
1957 through 1979

Year	Airport Traffic Enpl. & Depl.	Bank Deposits	Building Permits	Postal Receipts	Public School Enrollment	Pop- ulation <sup>2</sup>
1957	19,912	\$164,248,689.70	\$ 3,999,820	\$ 610,829.39	4,242	-
1958	21,526	172,475,088.56	7,275,420	621,643.37	4,410	-
1959	33,274	176,780,973.91	7,097,395	718,247.46	4,780	-
1960	35,280	172,518,604.23	8,857,987	723,922.30	5,049	27,670
1961	38,902	167,341,380.84	8,167,659	748,143.81	5,384	-
1962	43,151	162,854,591.03	6,369,722	760,296.50	5,546	-
1963	52,065	179,896,984.15	9,057,023	898,815.57	5,946	30,584
1964	58,007	181,606,039.64	8,420,409	910,232.71	6,293	-
1965	66,942	182,961,937.88	9,119,744	1,025,000.00	6,591	-
1966	76,450	195,138,259.48	8,753,971	1,064,904.86	6,971	-
1967	102,542	210,867,197.87	9,469,924	1,192,000.83	7,461	33,134
1968	121,047	210,846,781.18	14,492,719	1,263,728.78	7,818	-
1969	124,146	198,103,000.77	8,059,000	1,405,230.12	8,079	34,328
1970	109,991	217,778,390.61	7,640,078	1,524,351.90	8,160	34,703
1971	139,957	269,106,056.67	14,035,006	1,742,136.00	8,235	-
1972	133,180	292,208,596.16	18,101,002	1,925,846.87	8,300	-
1973	164,585	339,022,138.06	37,056,625	2,187,200.53	8,497	-
1974	192,640	397,891,181.63	22,661,246	2,732,718.54	8,425	38,123
1975	204,438	485,700,614.23	41,238,023	2,749,512.36	8,526	(40,000)E
1976	238,558	564,588,000.00	44,844,169	3,246,375.75	8,750	(41,500)E
1977	268,932	616,344,000.00	45,457,451	3,988,140.01	8,793	(42,500)E
1978	256,742	699,547,000.00	59,466,008	4,322,576.39	8,633	42,405
1979	372,489	703,035,000.00	70,103,038	4,985,904.00	8,596	(43,500)E

Years	Dwelling <sup>3</sup> Units	Telephones	Electric Meters	Water Meters	Gas Meters	Employment	Retail Sales
1957	6,746	-	7,665	-	5,180	8,856	\$ 40,327,000.00
1958	6,920	-	8,077	-	5,524	8,916	47,500,000.00
1959	7,308	13,482	8,592	-	5,914	9,552	44,752,000.00
1960	7,366	14,371	8,950	5,864	6,190	9,396	49,057,000.00
1961	7,734	15,122	9,184	6,196	6,426	9,530	63,671,000.00
1962	7,989	16,359	9,450	6,471	6,610	9,683	62,152,000.00
1963	8,284	17,118	9,755	6,746	6,861	10,188	51,039,000.00
1964	8,581	17,812	10,160	7,013	7,142	10,281	56,278,000.00
1965	8,897	19,005	10,673	7,267	7,373	11,303	59,595,000.00
1966	9,061	20,109	10,758	7,501	7,620	11,915	66,173,000.00
1967	9,267	20,878	11,105	7,649	7,851	12,370	75,267,000.00
1968	9,745	21,050	11,297	7,861	7,953	12,770	83,858,000.00
1969	10,016	22,652	11,490	8,091	8,129	13,370	81,515,000.00
1970	11,484	24,573	11,828	8,293	8,425	13,890	70,039,000.00
1971	12,316	26,009	12,178	8,574	8,824	15,250	78,287,000.00
1972	12,705	28,097	12,503	8,881	9,237	15,490	84,520,000.00
1973	13,225	32,406	12,893	9,162	9,649	16,120	91,163,000.00
1974	13,676	35,334	13,262	9,435	10,092	18,270	146,674,000.00
1975	14,768	38,393	14,036	9,791	10,839	19,180	163,889,000.00
1976	15,863	41,680	15,000	10,281	11,628	20,330	183,827,000.00
1977	17,345	45,094	15,942	10,769	12,177	20,280	234,441,000.00
1978	17,903	47,479	16,512	11,818	12,508	23,430	263,876,000.00
1979	18,602	49,791	17,386	11,850	12,926	24,200	299,367,000.00

NOTE:

<sup>1</sup>Reductions in airport traffic are due to airline strikes.

<sup>2</sup>U.S. Census figures (1974 year-end figure results actually U.S. Special Census, February 18, 1975.

<sup>3</sup>1970 Dwelling unit increase result of 1970 U.S. Census of Housing.





## APPENDIX B Summary of Level 1 and 2 Proposed Developments

Name of Project	County of Location	Type of Facility	Plant Capacity	Lignite Supply/Consumption (Million Tons/Yr.)	Average Annual Disburied Acreage	Total Acres Mined	Other Disburied Acreage	Water Use (Acres/Yr.)	Miles of Pipeline	Miles of Railroad	Miles of Transmission Lines	Miles of Road	Type of Labor Force	Peak Labor Force Requirements											
														1977	1978	1979	1980	1981	1982	1983	1984	1985	1986	1987	1988
Natural Gas Pipeline Company of America	Dunn	G	275	13.9	350	10,200	960	11,750	31	4	61	4	Const.	700	2,800	3,900	3,900	400	612	612	612	612	612	612	612
NGPL Gas Plant	Dunn	M	MMSCFD <sup>2</sup>		127			350					Const.				52	188	100	106	64				
Dunn Center Mine	Dunn	M		13.9	350	10,200	1,087	12,100	31	4	61	4	Const.	700	2,800	3,952	4,088	1,393	1,107	1,150	1,075	1,069			
ANG Coal Gas. Company	Mercer	G	275	9.4	500	17,979	448	11,400	12	8	325	1	Const.	397	760	832	624	791	638	123					
ANG Gas Plant	Mercer	M	MMSCFD		1,440			484					Const.												
ANG Ancillary Facilities	Mercer	M		9.4	500	17,979	2,345	17,484	373	12	8	5	Const.	5	32	82	108	108	160	160	160	160	160	160	160
Coteau Properties, Inc.	Mercer	M		9.4	500	17,979	2,345	17,484	373	12	8	5	Const.	751	1,803	4,011	2,364	1,037	1,361	1,992	2,349	2,198	1,484	1,171	
Coteau Mine	Mercer	M		9.4	500	17,979	2,345	17,484	373	12	8	5	Const.	751	1,803	4,011	2,364	1,037	1,361	1,992	2,349	2,198	1,484	1,171	
Total				5.2	500	17,979	448	11,400				1	Const.	402	812	914	732	899	798	283	160	160	160	160	160
Basin Electric Power Cooperative	Mercer	P	440MW	2.2	1,393	41,800	735	10,200	21.5	11			Const.	457	784	882	485	55	55	55	55	55	55	55	55
Antelope Valley Station	Mercer	P	440MW	2.2	1,393	41,800	735	10,200	21.5	11			Const.	457	784	882	485	55	55	55	55	55	55	55	55
Coteau Properties, Inc.	Mercer	M		5.2	500	17,979	448	11,400				1	Const.	397	760	832	624	791	638	123					
Coteau Mine	Mercer	M		5.2	500	17,979	448	11,400				1	Const.	397	760	832	624	791	638	123					
Total				5.2	500	17,979	448	11,400				1	Const.	402	812	914	732	899	798	283	160	160	160	160	160
Montana-Dakota Utilities Company	Mercer	P	440MW	2.2	1,393	41,800	735	10,200	21.5	11			Const.	457	784	882	485	55	55	55	55	55	55	55	55
Coyote 1 Power Plant	Mercer	P	440MW	2.2	1,393	41,800	735	10,200	21.5	11			Const.	457	784	882	485	55	55	55	55	55	55	55	55
Knife River Coal Mining Company	Mercer	M		5.2	500	17,979	448	11,400				1	Const.	397	760	832	624	791	638	123					
South Beulah Mine	Mercer	M		5.2	500	17,979	448	11,400				1	Const.	397	760	832	624	791	638	123					
Total				5.2	500	17,979	448	11,400				1	Const.	402	812	914	732	899	798	283	160	160	160	160	160
Consolidation Coal Company	Mercer	M		2.2	70	2,100*	872	11,000	25	331	2		Const.	623	677	871	930	475							
Glenbard Mine	Mercer	M		2.2	70	2,100*	872	11,000	25	331	2		Const.	623	677	871	930	475							
Total				2.2	70	2,100*	872	11,000	25	331	2		Const.	623	677	871	930	475							
Consolidation Coal Company	Mercer	M		3.8	155	3,938		38					Const.	156	156	156	156	156	156	156	156	156	156	156	156
Glenbard Mine	Mercer	M		3.8	155	3,938		38					Const.	156	156	156	156	156	156	156	156	156	156	156	156
Total				3.8	155	3,938		38					Const.	156	156	156	156	156	156	156	156	156	156	156	156
Total for Level 1				5.2	500	17,979	448	11,400				1	Const.	402	812	914	732	899	798	283	160	160	160	160	160
Nokota Company	McLean	M		6.6	340	35	76	3.5	3.5	1			Const.	125	50	125	50								
Mine #1	McLean	M		6.6	340	35	76	3.5	3.5	1			Const.	125	50	125	50								
Total				6.6	340	35	76	3.5	3.5	1			Const.	125	50	125	50								
Consolidation Coal Company	Mercer	M		4.0	301	100	100	22	6				Const.	163	153	270	235	225	225	225	225	225	225	225	225
Dakota Star Mine	Mercer	M		4.0	301	100	100	22	6				Const.	163	153	270	235	225	225	225	225	225	225	225	225
Total				4.0	301	100	100	22	6				Const.	163	153	270	235	225	225	225	225	225	225	225	225
Consolidation Coal Company	Mercer	M		3.0	120	100	100	37	10	10			Const.	251	176	176	176	176	176	176	176	176	176	176	176
Renner's Cove Mine	Mercer	M		3.0	120	100	100	37	10	10			Const.	251	176	176	176	176	176	176	176	176	176	176	176
Total				3.0	120	100	100	37	10	10			Const.	251	176	176	176	176	176	176	176	176	176	176	176
Consolidation Coal Company	McLean	M		5.0	442	100	100	40	1				Const.	90	202	202	202	202	202	202	202	202	202	202	202
Wasbaurn Mine	McLean	M		5.0	442	100	100	40	1				Const.	90	202	202	202	202	202	202	202	202	202	202	202
Total				5.0	442	100	100	40	1				Const.	90	202	202	202	202	202	202	202	202	202	202	202
Consolidation Coal Company	McLean	M		1.5	120	100	100	25	1				Const.	45	59	59	59	59	59	59	59	59	59	59	59
Underwood Mine	McLean	M		1.5	120	100	100	25	1				Const.	45	59	59	59	59	59	59	59	59	59	59	59
Total				1.5	120	100	100	25	1				Const.	45	59	59	59	59	59	59	59	59	59	59	59
Montana-Dakota Utilities Company	Mercer	P	440MW	2.2	1,393	41,800	735	10,000					Const.	457	609	784	837	430							
Coyote 2 Power Plant	Mercer	P	440MW	2.2	1,393	41,800	735	10,000					Const.	457	609	784	837	430							
Knife River Coal Mining Company	Mercer	M		5.2	500	17,979	448	11,400					Const.	397	760	832	624	791	638	123					
South Beulah Mine	Mercer	M		5.2	500	17,979	448	11,400					Const.	397	760	832	624	791	638	123					
Total				2.2	70	2,100*	872	11,000	25	331	2		Const.	623	677	871	930	475							
Total Increase for Level 2 Proposals				2.2	70	2,100*	872	11,000	25	331	2		Const.	623	677	871	930	475							
Level 2 Grand Total				56.8	2,468	76,017	5,487	62,222	429	37.5	736	12	Const.	623	1,778	3,418	6,391	6,083	5,640	6,367	3,266	2,390	1,319	313	
				56.8	2,468	76,017	5,487	62,222	429	37.5	736	12	Const.	228	280	346	462	1,113	1,151	1,216	2,367	3,199	3,324	3,541	3,535
				56.8	2,468	76,017	5,487	62,222	429	37.5	736	12	Total	851	2,058	3,764	6,853	7,196	6,791	7,583	5,633	5,589	4,643	3,854	3,535

SOURCE: This data compiled from information supplied by Natural Gas Pipeline Company of America, Chicago, IL, 1977; American Natural Resources Company, Detroit, MI, 1977; Basin Electric Power Cooperative, Bismarck, ND, 1977; Otter Tail Power Company, Fargo, ND, 1977; Consolidated Coal Company, Denver, CO, 1977; Dakota Star Mine, Bismarck, ND, 1977; Knife River Coal Mining Company, Bismarck, ND, 1977; and Montana-Dakota Utilities Company, Bismarck, ND, 1977.



APPENDIX C  
SHOPPING CENTERS TENANT LIST  
BISMARCK, NORTH DAKOTA  
JULY 1980

KIRKWOOD PLAZA

**BANKS**

Bank of Kirkwood Plaza  
 First Federal Savings & Loan  
 State Bank of Burleigh County

**CARDS AND GIFTS**

Evenson Card Shop  
 Hatch's  
 King & Queen  
 Spencer Gifts

**DEPARTMENT STORES**

Herberger's  
 Montgomery Ward  
 J. C. Penney  
 Target  
 Woolworth's

**FOOD, BEVERAGE AND CANDY**

Carousel Snack Bar  
 Fanny Farmer  
 4B's Restaurant  
 Great Hot Dog Experience  
 The Grove  
 Karmelkorn  
 Orange Julius  
 Peanut Shack  
 Prairie Schooner  
 Swiss Colony  
 Super Valu  
 33 Flavors Ice Cream

**JEWELRY**

Claire's Boutique  
 Gordon's Jewelry  
 Jewelry Joint  
 Puffe's Keepsake  
 D. L. Wing & Company  
 Zales Jewelry

**SPECIALTIES**

Cashman's Floral  
 Cole's - The Books People  
 Concepts in Dining  
 B. Dalton Bookseller  
 Face Factory  
 General Nutrition  
 Hardware Hank  
 Kay Bee Toys  
 Keys & Things  
 Osco Drug  
 Plaza III Theatres  
 Renner Studios  
 Singer Company  
 So Fro Fabrics  
 The Exchange Coin  
 & Antique Shop  
 T-Shirts Plus  
 Wizard

**WOMEN'S AND CHILDREN'S APPAREL**

Black's for Women  
 County Seat  
 5-7-9 Shops  
 Foxmoor Casuals  
 Herbst  
 Jean Njcole  
 Laurie's  
 Lerner  
 Maurices Apparel  
 Morrey Alan  
 Perry's for the Young  
 Rebel Jeans  
 Size 5-7-9 Shop  
 Susie's Casuals  
 Stuart's  
 Touch of Class  
 Vanity

**MUSIC, RECORDS AND RADIO**

Music City  
 Musicland  
 Radio Schack  
 Wylie Piano

Kirkwood Plaza Continued:

**MEN'S APPAREL**

American Man  
 County Seat  
 Hal's Sportswear  
 Jeans West  
 KG Men's Store  
 Rebel Jeans  
 Young America

**SERVICES**

Century Eye Wear  
 Command Performance  
 Duling Optical  
 Kirkwood Motor Inn  
 Kirkwood Standard  
 Midwest Vision Center  
 Regis Salon  
 The Sun Spot  
 Tower Insurance  
 Viking Travel

**SHOES**

Baker's Shoes  
 Burt's Shoes  
 Footlocker  
 KG Bootery  
 Kinney Shoes  
 Nobil Shoes  
 Richmond Bootery  
 Thom McAn

GATEWAY MALL

**DEPARTMENT STORE**

A. W. Lucas Company  
 Osco Drug  
 Sears, Roebuck & Co.  
 White Mart

**FOOD**

Cheddar Box  
 Fudge N Fantasy  
 Nutrition World  
 Orange Julius  
 Snacks  
 State Street Cafe  
 Taco Tina  
 Turn of the Century  
 McDowell's (Outlot)  
 Paradiso (Outlot)  
 Perkins Cake N' Steak (Outlot)

**GIFTS**

Evenson's Hallmark  
 Junique's  
 Loken's China & Gifts

**JEWELRY**

Jewelry Box  
 Lund Jewelry  
 Walkers N' Daughters Jewelry

**MEN'S READY TO WEAR**

Desmond's  
 Hansen's Mens Wear  
 Jeanyery  
 Mr. Mark

**SEASONAL & MISCELLANEOUS**

Bob's Pako Filmshop  
 Clown Town  
 Cole's Book Store  
 Frames Plus  
 JoAnn Fabrics  
 Lowe's Garden Corner  
 Meredith's Craft & Hobby  
 Merle Norman Cosmetics  
 Midwest Vision  
 Prospector  
 Regis Hairstylists  
 Vac N Sew  
 Wood N Candle

Gateway Mall Continued:

**MUSIC**

Musicland  
 Radio Schack

**SHOES**

Athlete's Foot  
 Kinney Shoes  
 Red Cross Shoes  
 Richmond Bootery  
 Tradehome Shoes

**SPECIALTY READY TO WEAR**

Perry's for the Young  
 Pied Piper  
 Shirt Works

**WOMEN'S READY TO WEAR**

Barker's  
 Better Half  
 Morrey A  
 Rebel Jeans  
 Stevenson's  
 Maurice's

NORTHBROOK SHOPPING CENTER

The Arcade  
 Book Shelf  
 The Bottom Drawer  
 The Cheddar Box  
 Coin Gallery  
 Discount Liquor  
 The Earth Pantry  
 The Fabric Shop  
 Feists TV  
 Geri's Junior Shop  
 Hansen's (menswear)  
 Interior Concepts  
 J. & D. Audio Visual Service  
 Kids Klothes  
 The Kitchen Cupboard  
 The Leather Rack  
 Lolac Cards and Gifts  
 Northbrook Drug  
 Northbrook Saddlery  
 Northbrook Shoe Repair  
 North Dakota License Photo  
 Nuthin But Music  
 O.K. Hardware  
 One-Hour Martinizing  
 Plant and Sea  
 Red Owl  
 Rings 'n Things  
 Shear Wizards  
 Snack Bar  
 The Toy Depot  
 The Trinket Box  
 Wicker and Works  
 The Wok  
 Wood 'n Knot Shop

ARROWHEAD PLAZA

Arrowhead Cleaners  
 Ben Franklin  
 Dan's Super Valu  
 First National Bank and Trust Co.  
 Hallmark Card Center  
 Plaza Barber Shop  
 Plaza Beauty Salon  
 Plaza Beer Depot  
 Plaza Drug  
 Scheels-Hardware/Sport  
 Shoe Plaza

