

# ***Village of Richfield, Ohio Retail Market Analysis***

***Prepared for:***  
Village of Richfield

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## EXECUTIVE SUMMARY

The scope of this retail market analysis was to evaluate current and projected consumer spending and supply to determine whether or not there is or may be unmet retail demand in the Village of Richfield, Ohio. This analysis focused on the study area contained in the Richfield Crossroads Planning Study, which is generally centered at the intersection of Wheatley Road and Brecksville Road and extends in a radius of approximately ¼ - mile from that point. The easternmost edge of the area abuts Interstate 77 and has direct access to the interstate. The area is predominantly commercial, containing office, light industrial and retail uses.

Following is a summary of the findings from the retail market analysis market:

- The Village of Richfield (zip code 44286) contains a total of 286 business establishments with 5,860 total employees and associated annual wages of \$308,804,000. The majority of establishments (52%) are small businesses with 4 or fewer employees. Ninety percent (90%) of businesses in Richfield have less than 50 employees.
- For purposes this analysis, the retail and hotel industries include selected businesses with NAICS codes beginning with 44, 45, 721 and 722. Food service contractors (NAICS 722310) were excluded from the retail industry for this analysis. Ten percent (10%) or 29 of 286 total businesses in Richfield are in the retail or hotel industry. Twelve (12) of the 29 can be best described as local, convenience-oriented retailers such as a convenience store, florist, jeweler, gas station, etc. Fourteen (14) other retail businesses are food service related such as restaurants and bars, and there are 3 businesses in the hotel industry (NAICS 721).
- There are a significant number of regional retail centers – centers with 200,000+ gross leasable square feet – within a 15 to 20-minute drive of Richfield in communities such as Fairlawn, Macedonia, Hudson, Akron and Medina. The regional retail centers located in these communities contain millions of square feet of gross leasable space and a wide variety of retail goods and services from most retail industry sectors. The regional retail centers in Fairlawn (zip code 44333) and Macedonia (zip code 44056) are the nearest to Richfield; both are approximately a 10 to 15-minute drive from the study area in Richfield. Both areas contain a wide variety of stores, including big box retailers such as Target, Wal-Mart, Lowe's, Home Depot and Dick's Sporting Goods; grocery stores such as Giant Eagle and Acme Fresh Foods; department stores such as Kohl's, Dillard's and Macy's; and a multitude of specialty stores and restaurants. The stores in these communities offer consumers access to goods and services for most types of consumer shopping needs.
- This analysis focused on the convenience shopping trade area as most retail businesses in Richfield currently provide convenience-oriented goods and services. The trade area of Richfield

is assumed to be a 10-minute drive time from the intersection of Wheatley Road and Brecksville Road based on the research and analysis for this report.

- The number of households in the Trade Area is expected to increase 2.3% between 2010 and 2015 from 5,271 to 5,391 households. More households create greater demand for retail goods, which is a positive indicator for retail businesses within the trade area. The median household income of a trade area household was 95.3% higher than the median income of an average Ohio household (\$44,886) in 2010 (source: U.S. Census Bureau). Nearly sixty percent (60%) of households in the Trade Area have incomes between \$50,000 and \$149,999. And more than fifteen percent (15%) of Trade Area households have incomes of \$200,000+. Compared to Ohio and the nation, Trade Area households have substantial buying power.
- Population in the Trade Area is expected to grow modestly between 2010 and 2015, increasing from 14,636 to 14,882. Esri data projects the number of Trade Area households to increase 2.3% – 120 additional households – between 2010 and 2015 from 5,271 to 5,391. In addition, the Richfield Crossroads Planning Study forecasts approximately 55 new households in the Wheatley Development Area. By 2015, more than 80% of the population in the Trade Area is expected to be 18 years or older with the majority (56.9%) of the population between the ages of 35 and 74. Nearly ninety-seven percent (97%) of the Trade Area population is white. The Trade Area population is well educated with nearly half (46%) of the population having a bachelor's degree or higher. More than seventy-four percent (74%) of the Trade Area population works in white-collar occupations.
- The top three retail categories (measured by number of stores) within the Trade Area are Food Services & Drinking Places (95), Clothing & Accessories Stores (75) and Miscellaneous Retail Stores (47).
- Within the Trade Area, there is a significant surplus of retail sales for total retail trade and food and drink (i.e., restaurants). According to the retail data, there is a total surplus or excess supply of retail sales in the Trade Area of more than \$426 million, indicating a market where customers are drawn from outside the Trade Area. A closer look at the data shows that only one retail industry subsector in the Trade Area (Motor Vehicle & Parts Dealers – NAICS 441) had unmet demand. Smaller trade areas typically have unmet demand in the Motor Vehicle & Parts Dealers subsector as automobile and parts dealers, in recent years, have been clustering a variety of dealerships and related services into car-buying retail centers that are designed to draw shoppers from a large region or trade area.
- Based on the leakage factors (unmet demand) identified in this analysis, excluding the Motor Vehicle & Parts Dealers subsector, four industry groups showed unmet demand that could be served through additional sales by existing or new businesses in those industry groups. Those industry groups with unmet demand include: Beer, Wine & Liquor Stores; Used Merchandise Stores; Special Food Services (e.g., caterers, mobile food services, airline food service

contractors); and Drinking Places – Alcoholic Beverages. Given the industry groups and the relatively low amount of unmet demand, it is likely that the leakage in those industries is being served adequately by businesses just outside the Trade Area. Therefore, those industry groups most likely do not present an opportunity for new retail growth.

- Total retail demand in the Trade Area is forecasted to increase by \$50.24 million as a result of household growth forecasted by Esri as well as business growth identified in the Crossroads Planning Study. However, excluding Motor Vehicle & Parts Dealers, there is sufficient supply in the Trade Area at the industry group level to meet the associated demand increase.
- There is a total surplus or excess supply of Hotel and Motel industry (NAICS 721) sales in the Trade Area of just under \$1.48 million, indicating a market where customers are drawn from outside the Trade Area. Total local demand includes industry (i.e., businesses) and institutional (i.e., households and government) demands for accommodations in the Trade Area.
- Total local demand for hotel and motel accommodations in the Trade Area is forecasted to increase by a little more than \$894,000 per year as a result of anticipated household and business growth. The total forecasted increase in demand for hotel and motel accommodations would reduce the current Hotel Gap, leaving slightly less than \$600,000 of surplus supply.
- Overall, the Trade Area has a sufficient amount of retail and hotel/motel services to meet the current demand as well as anticipated future demand, according to this analysis. Much of the unmet retail demand (leakage) from the Trade Area is associated with spending for automobiles and related purchases. Automobile and related retailers tend to locate regionally-focused stores in high traffic areas adjacent to other regional shopping centers. Within the Trade Area, those stores are primarily located in Fairlawn and Macedonia. Retail categories most likely to expand or locate in the Trade Area (i.e., Richfield) include those that sell convenience-oriented goods (e.g., food & beverage stores, grocery, etc.) and restaurants that could take advantage of the projected future demand created by the completion of the development scenarios outlined in the Crossroads Planning Study. All retail is not the same; tourist or destination-oriented (e.g., lifestyle centers) retail approaches may provide unique opportunities to serve markets beyond the traditional trade area.

The findings from this analysis do not, in any way, guarantee any result from the use of the analysis. Retail markets are dynamic and any unforeseen changes within the regional market such as unknown developments and changes in economic conditions could significantly affect the findings and recommendations in this report.

## PREFACE

The Village of Richfield (“Village” or “Richfield”) contracted MB3 Consulting to complete a retail market analysis to identify potential opportunities for retail development in Richfield associated with the Richfield Crossroads Planning Study. The specific goals of this market analysis are detailed below.

## Project Goals

The primary goal of this retail market analysis was to identify potential opportunities for traditional retail development in Richfield, particularly in the Wheatley Development Area, which is generally centered at the intersection of Wheatley Road and Brecksville Road (the “Development Site” or “WDA”). The specific goals of this market assessment included the following:

- Determine the competitive retail market area.
- Identify current and 5-year projections for population, population 18+, households and median household income.
- Understand current retail activity within market area, including:
  - Total retail household spending by type of retail establishment
  - Retail spending by employees of local businesses
  - Number of retail establishments by type
  - Retail leakage/surplus by category
- Assess square footage needed to serve market demands compared to current available square footage to determine whether there may be too much or not enough buildings to serve the market effectively.
- Determine possible future commercial and residential development in the trade area.
- Identify the drive-time trade area.
- For the trade area, estimate the following:
  - Retail Demand (For purposes of this report, retail includes restaurants – limited and full-service.)
  - Retail Supply
  - Retail Gap (Demand – Supply)
- Understand industry specific characteristics and absorption trends.

## Methods

MB3 Consulting (“MB3”) completed the following steps to achieve the project goals outlined above:

1. Met with Village representatives to understand the project and Village’s priorities, discuss commercial land use plans and issues, discuss community strengths and weaknesses from a commercial development perspective, and develop the project approach.
2. Reviewed documents and data from the comprehensive planning process – reviewed current planning data such as the Richfield Crossroads Planning Study.

3. Assessed Current Retail Mix – reviewed the existing retail mix in the Village and region to better understand the potential competition to Richfield. The regional retail competition was evaluated based on its proximity to Richfield, location characteristics, tenant mix and targeted customer appeal.
4. Gathered Demographic and Household Data – collected detailed information about individuals and households in the Village and region to better understand the likely buying wants, needs and habits of regional retail customers.
5. Identified Trade Area – identified the retail (including restaurants) trade area for Richfield based on a broad review of demographic, household and existing retail characteristics in the region. The “Trade Area” represents an area measured by a 10-minute drive-time radius from the WDA. Identifying a more specific trade area would require comprehensive primary research such as conducting an in-depth patron identification survey. This would allow the Village to tabulate and map patron zip codes.
6. Gathered Trade Area Population, Demographic and Lifestyle Characteristics – gathered current and projected population, demographic and lifestyle statistics for the Trade Area. The information includes, but is not limited to, demographic characteristics such as income, occupation, education, age, race, household size and housing characteristics. In addition, specific lifestyle groups were identified that make up the neighborhoods in the trade area. The lifestyle groups showcase distinct behavioral market segments that provide a clearer picture of the habits, preferences, life stage, etc. of individual households within the Trade Area – this method allows for a better assessment of potential customers, not to just simply identify numbers of people.
7. Gathered Retail Supply and Demand Data for the Trade Area – obtained detailed supply and demand data for the Trade Area to identify gaps (i.e., unmet demand) therein.

**Note:** The findings and recommendations from this analysis do not, in any way, guarantee any result from the use of the analysis. Retail markets are dynamic and any unforeseen changes within the regional market such as unknown developments and changes in economic conditions could significantly affect the findings and recommendations in this report.

## VILLAGE OF RICHFIELD INDUSTRY MIX

The North American Industry Classification System (NAICS) was used to categorize industries in the Village of Richfield. NAICS is used by Federal statistical agencies to classify business establishments for the collection, analysis and publication of statistical data related to the economy of the United States.

NAICS is a two through six-digit hierarchical classification code system, offering five levels of detail ... more digits in the code signify greater classification detail. The first two digits designate the economic sector, the third digit designates the subsector, the fourth digit designates the industry group, the fifth digit designates the NAICS industry and the sixth digit designates the national industry (NAICS Association; <http://www.naics.com/>).

Based on 2010 economic data from the US Census Bureau, the Village of Richfield (zip code 44286) contains a total of 286 business establishments with 5,860 total employees and associated annual wages of \$308,804,000. The majority of establishments (52%) are small businesses with 4 or fewer employees. Ninety percent (90%) of businesses in Richfield have less than 50 employees.

### *Business Establishments in Richfield by Industry*

| NAICS Code | Industry Description   | No. of Establishments | Percent of Total |
|------------|--|-----------------------|------------------|
| -----      | <i>Total for all industry sectors</i>                            | <b>286</b>            | <b>100.0%</b>    |
| 21----     | Mining, quarrying, and oil and gas extraction                    | 1                     | 0.3%             |
| 23----     | Construction   | 29                    | 10.1%            |
| 31----     | Manufacturing  | 11                    | 3.8%             |
| 42----     | Wholesale trade  | 48                    | 16.8%            |
| 44----     | Retail trade   | 12                    | 4.2%             |
| 48----     | Transportation and warehousing                                   | 17                    | 5.9%             |
| 51----     | Information  | 7                     | 2.4%             |
| 52----     | Finance and insurance  | 18                    | 6.3%             |
| 53----     | Real estate and rental and leasing                               | 6                     | 2.1%             |
| 54----     | Professional, scientific, and technical services                 | 36                    | 12.6%            |
| 55----     | Management of companies and enterprises                          | 5                     | 1.7%             |
| 56----     | Administrative and Support and Waste Mgmt. and Remediation Svcs. | 20                    | 7.0%             |
| 61----     | Educational services   | 5                     | 1.7%             |
| 62----     | Health care and social assistance                                | 21                    | 7.3%             |
| 71----     | Arts, entertainment and recreation                               | 6                     | 2.1%             |
| 72----     | Accommodation and food services                                  | 21                    | 7.3%             |
| 81----     | Other services (except public administration)                    | 23                    | 8.0%             |

*Source: 2010 Zip Code Business Patterns, U.S. Census Bureau.*

### **Richfield's Retail Industry**

For purposes of this analysis, the retail and hotel industries include selected businesses with NAICS codes beginning with 44, 45, 721 and 722. Food service contractors (NAICS 722310) were excluded from



the retail industry for this analysis. Ten percent (10%) or 29 of 286 total businesses in Richfield are in the retail and hotel industry sectors as described above.

***Retail and Hotel Business Establishments in Richfield***

| NAICS Code              | Industry Description                                       | No. of Establishments |
|-------------------------|--|-----------------------|
| <b>44, 45, 721, 722</b> | <b>Total</b>   | <b>29</b>             |
| <b>44 – 45</b>          | <b>Retail trade</b>  | <b>12</b>             |
| 441310                  | Automotive parts and accessories stores                    | 1                     |
| 444130                  | Hardware stores  | 1                     |
| 444210                  | Outdoor power equipment stores                             | 1                     |
| 444220                  | Nursery, garden center and farm supply stores              | 1                     |
| 445110                  | Supermarkets and other grocery (except convenience) stores | 1                     |
| 445120                  | Convenience stores   | 1                     |
| 447110                  | Gasoline stations with convenience stores                  | 1                     |
| 447190                  | Other gasoline stations                                    | 1                     |
| 448310                  | Jewelry stores   | 2                     |
| 451120                  | Hobby, toy and game stores                                 | 1                     |
| 453110                  | Florists   | 1                     |
| <b>721---</b>           | <b>Hotels (except casino hotels) and motels</b>            | <b>3</b>              |
| <b>722---</b>           | <b>Food services</b>                                       | <b>14</b>             |
| 722110                  | Full-service restaurants                                   | 5                     |
| 722211                  | Limited-service restaurants                                | 4                     |
| 722212                  | Cafeterias, grill buffets and buffets                      | 1                     |
| 722213                  | Snack and nonalcoholic beverage bars                       | 1                     |
| 722410                  | Drinking places (alcoholic beverages)                      | 3                     |

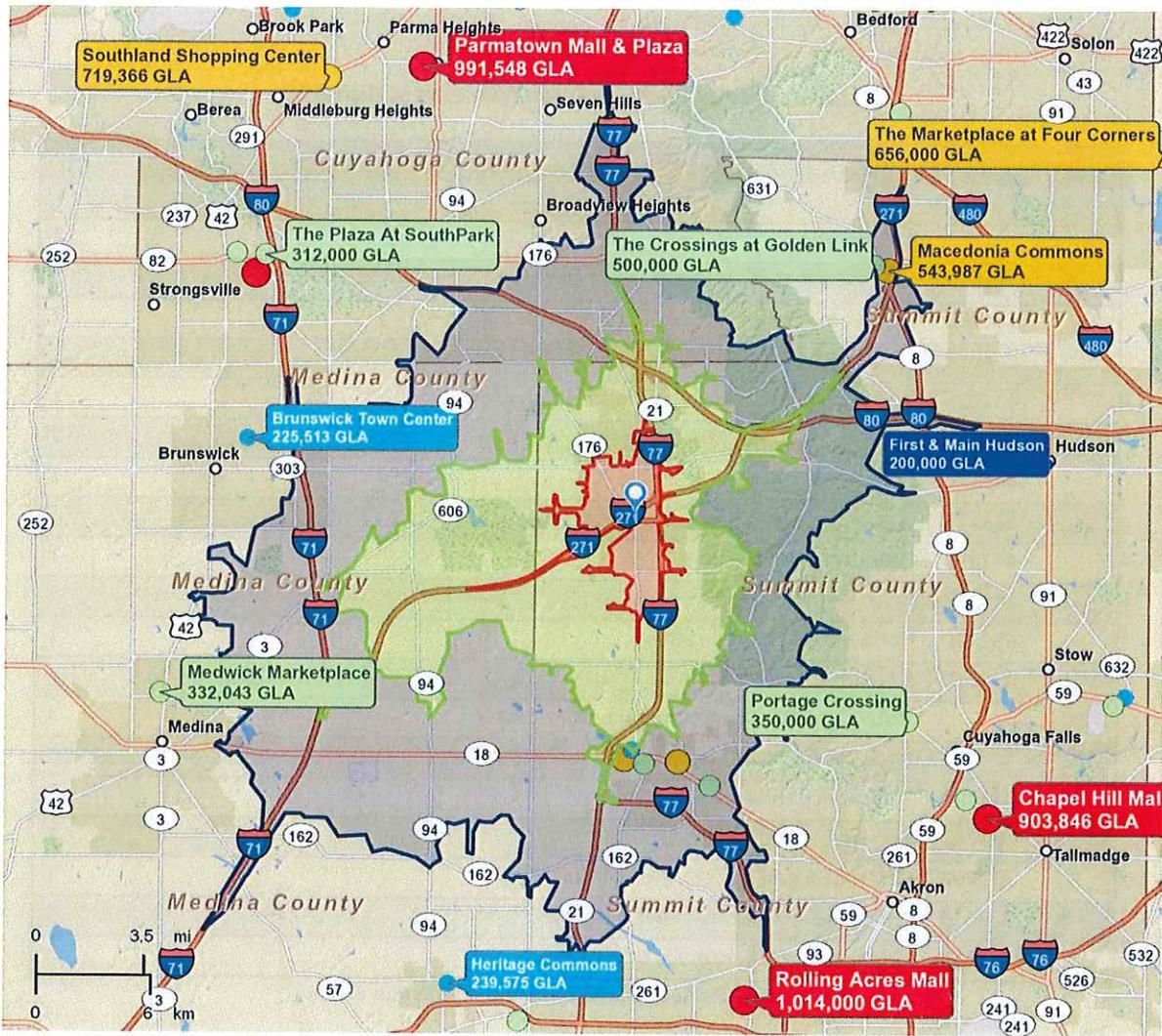
*Source: 2010 Zip Code Business Patterns, U.S. Census Bureau.*

**Comparison to Nearby Retail Centers**

There are a significant number of regional retail centers – centers with 200,000+ gross leasable square feet – within a 15 to 20-minute drive of Richfield in communities such as Fairlawn, Macedonia, Hudson, Akron and Medina. The regional retail centers located in these communities contain millions of square feet of gross leasable space and a wide variety of retail goods and services from most retail industry sectors.



### Retail Shopping Center Map



Source: Esri

The regional retail centers in Fairlawn (zip code 44333) and Macedonia (zip code 44056) are the nearest to Richfield; both are approximately a 10 to 15-minute drive from the Development Site in Richfield. These centers contain a large group of value retailers in major categories such as apparel, books, bed and bath, sporting goods, electronics, movie theatres and home improvement joined with a variety of small conventional retailers and service providers (e.g., banks) that occupy smaller out parcels. Stores in these retail centers include retailers such as Target, Wal-Mart, Lowe’s, Home Depot and Dick’s Sporting Goods; grocery stores such as Giant Eagle and Acme Fresh Foods; department stores such as Kohl’s, Dillard’s and Macy’s; and a multitude of specialty stores and restaurants. The retail centers in these communities offer consumers access to goods and services for most types of consumer shopping needs.



### *Retail and Hotel Industry Comparison to Selected Communities*

| NAICS Code              | Industry Description | No. of Establishments<br>- Richfield | No. of Establishments<br>- Fairlawn | No. of Establishments<br>- Macedonia |
|-------------------------|----------------------|--------------------------------------|-------------------------------------|--------------------------------------|
| <b>44, 45, 721, 722</b> | <b>Total</b>         | <b>29</b>                            | <b>273</b>                          | <b>88</b>                            |
| <b>44 – 45</b>          | Retail trade         | 12                                   | 200                                 | 56                                   |
| <b>721----</b>          | Hotel and motels     | 3                                    | 5                                   | 5                                    |
| <b>722----</b>          | Food services        | 14                                   | 68                                  | 27                                   |

*Source: 2010 Zip Code Business Patterns, U.S. Census Bureau.*

In assessing the retail market, the number of retail establishments is much less important than the volume of retail goods and services being offered (i.e., supply) and the spending capacity of buyers of those goods and services (i.e., demand). To better understand the balance or imbalance between retail supply and demand in Richfield, we must first understand the trade area of retail businesses located in and around the Village.

## **TRADE AREA**

### **What is a trade area?**

A trade area is the geographic region from which retail businesses in a community draw most of their customers. Recognizing Richfield’s trade area allows us to determine the number of customers in the trade area and allows us to estimate the demand for various retail goods based on the typical spending patterns of those customers. Consequently, defining the trade area is an important early step in assessing a retail market.

The boundaries of a retail trade area rarely match the political boundaries of a community because trade areas are determined by the types of retailers at a location. Different types of retailers will have different trade areas; in other words, customers will travel further to purchase certain goods and services. Although individual stores may have their own distinctive trade area, we can categorize trade areas into two general groups based on the type of goods being sold: (1) convenience shopping trade areas and (2) destination shopping trade areas. A *convenience shopping trade area* is defined by the purchase of goods and services needed on a regular basis (e.g., gasoline, groceries, hair care, etc.). Since these purchases are relatively frequent, people usually find it more convenient to make convenience-oriented purchases at businesses located close to their home or workplace. A *destination shopping trade area* is based on the purchase of “major” goods and services needed or wanted on an infrequent basis (e.g., appliances, furniture, clothing or products that are distinctive in some way). People are willing to travel longer distances to comparison shop for these kinds of items. This analysis will focus on the convenience shopping trade area as most retail businesses in Richfield currently provide convenience-oriented goods and services. (“Trade Area Analysis.” *University of Wisconsin – Extension*.



<http://fyi.uwex.edu/downtown-market-analysis/understanding-the-market/trade-area-analysis/>.

Accessed September 12, 2012.)

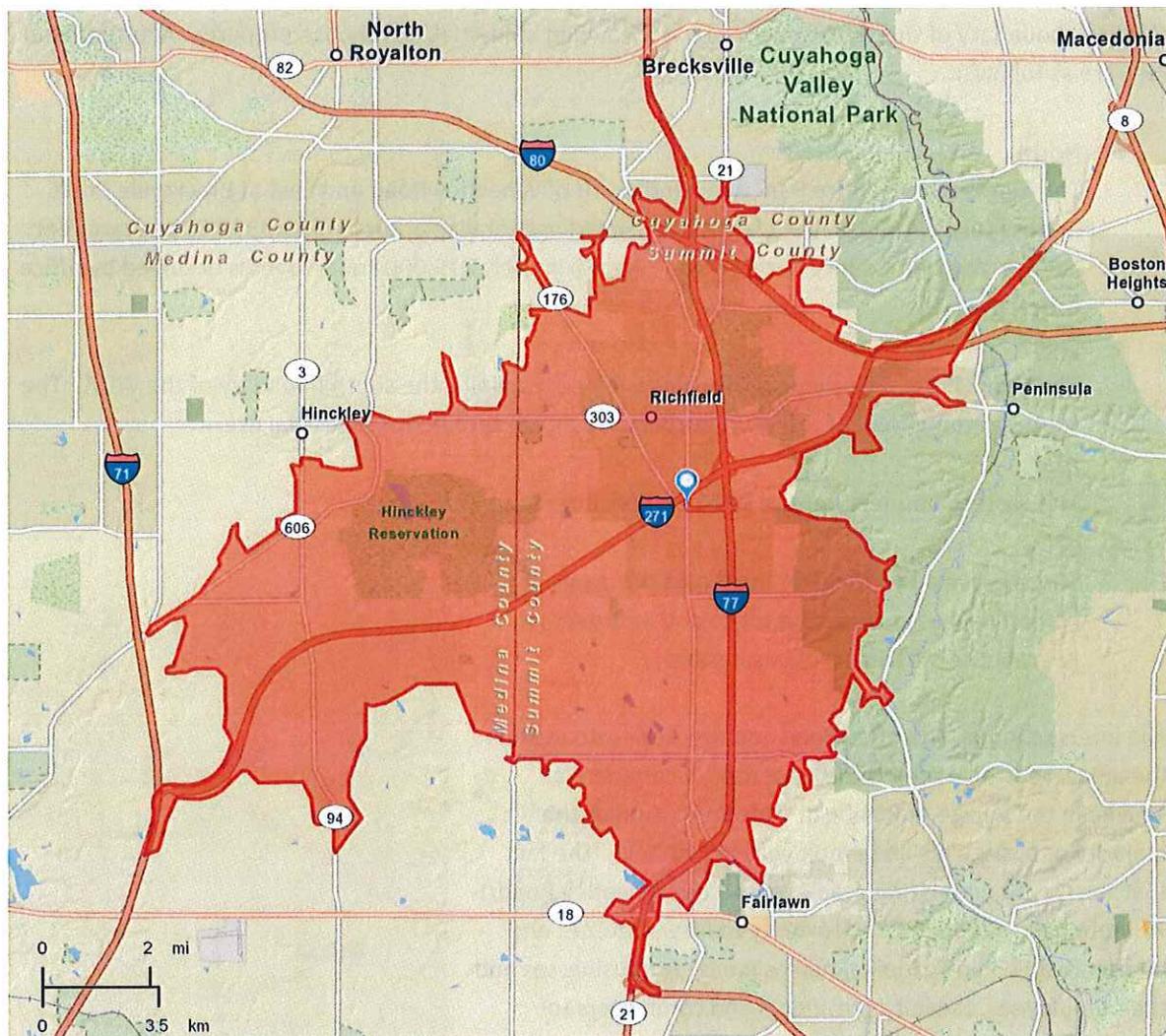
Following are geographic information-based techniques commonly used to define retail trade areas:

- Simple distance rings,
- Drive-time polygons, and/or
- Gravity models.

Stores that provide convenience-oriented goods and services are mainly affected by travel distance since consumers are not as willing to travel longer distances for convenience goods. Using drive times (i.e., travel distance) to define Richfield's trade area may be more useful because of the types of convenience-oriented products and services offered by stores in the Village. The proximity of the regional retail centers in nearby communities within a 10 to 15-minute drive of the Development Site will influence the buying decisions of customers (both residence and daytime employees) in Richfield. Based on the mix of convenience-oriented retail in Richfield and the relatively close proximity of regional shopping centers, drive-time polygons were used as a benchmark for defining the retail trade area of the Village of Richfield.

The trade area for the Development Site (i.e., Richfield) is assumed to be a 10-minute drive time from the WDA based on the research and analysis for this report (the "Trade Area"). Below is a map showing the Trade Area drive-time polygon. The area in red on the map shows the 10-minute drive-time range from the WDA, defining the boundaries of the Trade Area.

**Trade Area Map – 10-minute Drive Time  
(Wheatley Road and Brecksville Road, Richfield, Ohio 44286)**



Source: Esri

## LOCATION ANALYSIS

This section includes an assessment of the proposed Wheatley Development Area identified in the Richfield Crossroads Planning Study (the “Planning Study”). The description is based upon MB3’s review of the Planning Study site plans, physical review of the Development Site and interviews with local officials.

The Development Site consists of a total of approximately 67 acres of undeveloped land, of which, the Village of Richfield owns almost 20 acres; the balance is held by a number of private owners. The WDA is located south of Wheatley Road between Brecksville Road (west) and Interstate 77 (east). The southern boundary of the WDA abuts a privately-owned industrial/warehouse property. Adjacent land uses are as follows:

- **North**  
The Kinross Lakes Office Park is located north of Wheatley Road and East of Brecksville Road. Kinross Lakes includes five, class A office buildings totaling approximately 310,000 square feet (source: Summit County Fiscal Office). Approximately 219,000 square feet is occupied by office users currently.
- **South**  
The FedEx Freight warehouse/distribution facility adjoins the south boundary of the WDA. The southeast boundary of the WDA borders vacant land zoned for industrial use.
- **East**  
The eastern boundary of the WDA borders Interstate 77.
- **West**  
The area west of Wheatley Road contains a mix of commercial uses, including office and industrial (warehouse/distribution) businesses.

The intersection of Wheatley Road and Brecksville Road and the adjacent ¾-mile area is the epicenter of commercial activity in the Village of Richfield. This area contains the majority of businesses and employees in Richfield. The fact that the Development Site is adjacent to the Wheatley Road/I-77 interchange and in close proximity to Interstate 271 and Interstate 80 (Ohio Turnpike) makes it easy for businesses and their employees, as well as residents and commuters to access the area.



## Richfield Crossroads Planning Study

The Richfield Crossroads Planning Study, which was completed in February 2012, proposes the following new developments in the area surrounding the intersection of Wheatley Road and Brecksville Road:

### Wheatley Development Area

- Mixed-use development
  - 305,000 sq. ft. office
  - 80,000 sq. ft. hotel
  - 41,000 sq. ft. retail

- 82,000 sq. ft. residential

### **Kinross Lakes Office Park**

- Office park expansion
  - 125,000 sq. ft. office
  - 26,000 sq. ft. retail

### **Proposed New Development Area (extension of Highlander Parkway to Congress Parkway)**

- Light industrial / office development
  - 249,000 sq. ft. light industrial/office
  - 463,000 sq. ft. office

*Richfield Crossroads Proposed Site Plan*



## TRADE AREA DEMOGRAPHIC AND INDUSTRY DATA

This section of the report provides in-depth information about select demographic and industry characteristics of the Trade Area. The historic and projected demographic and industry data used in this report was from the Esri ([www.esri.com](http://www.esri.com)), Market Profile Report. Esri is a worldwide leader in the development of geographic information systems and reputable supplier of demographic and consumer data.

### Household and Lifestyle Data

A summary of select demographic characteristics within the Trade Area (10-minute drive of WDA) is as follows:

|                                | 2000     | 2010     | 2015      | '10-'15 Annual Rate |
|--------------------------------|----------|----------|-----------|---------------------|
| <b>Total Population</b>        | 13,680   | 14,638   | 14,880    | 0.33%               |
| <b>Households</b>              | 4,855    | 5,271    | 5,391     | 0.45%               |
| <b>Median Household Income</b> | \$76,455 | \$87,655 | \$103,228 | 3.55%               |
| <b>Per Capita Income</b>       | \$41,482 | \$45,409 | \$50,733  | 2.34%               |

Source: Esri

### Households

The number of households in the Trade Area is expected to increase 2.3% between 2010 and 2015 from 5,271 to 5,391 households according to the Esri data. More households create greater demand for retail goods, which is a positive indicator for retail businesses within the Trade Area. The median household income of a Trade Area household was 95.3% higher than the median income of an average Ohio household (\$44,886) in 2010 (source: US Census Bureau). Nearly 60% of households in the Trade Area have incomes between \$50,000 and \$149,999. And more than 15% of Trade Area households have incomes of \$200,000+. Compared to Ohio and the nation, Trade Area households have substantial buying power. The tables below provide additional information about Trade Area households.

#### Trade Area Household Data

|                               | 2000   | 2010   | 2015   | '10-'15 Annual Rate |
|-------------------------------|--------|--------|--------|---------------------|
| <b>Total Population</b>       | 13,680 | 14,638 | 14,880 | 0.33%               |
| <b>Household Summary:</b>     |        |        |        |                     |
| <b>Households</b>             | 4,855  | 5,271  | 5,391  | 0.45%               |
| <b>Average Household Size</b> | 2.77   | 2.72   | 2.71   |                     |
| <b>Families</b>               | 3,930  | 4,209  | 4,282  | 0.34%               |
| <b>Average Family Size</b>    | 3.11   | 3.07   | 3.06   |                     |
| <b>Housing Unit Summary:</b>  |        |        |        |                     |
| <b>Housing Units</b>          | 5,071  | 5,613  | 5,808  | 0.69%               |

|   |           |           |           |       |
|---|-----------|-----------|-----------|-------|
| Owner Occupied Housing Units  | 88.3%     | 84.5%     | 83.4%     |       |
| Renter Occupied Housing Units   | 7.5%      | 9.4%      | 9.4%      |       |
| Vacant Housing Units  | 4.1%      | 6.1%      | 7.2%      |       |
| Median Household Income   | \$76,455  | \$87,655  | \$103,228 | 3.55% |
| Median Home Value   | \$230,213 | \$238,040 | \$240,792 | 0.23% |
| Per Capita Income   | \$41,482  | \$45,409  | \$50,733  | 2.34% |
| Median Age  | 43.4      | 48.5      | 49.9      |       |
| <b>Households by Income:</b>  |           |           |           |       |
| Household Income Base   | 4,854     | 5,271     | 5,391     | 0.45% |
| <\$15,000   | 4.3%      | 2.9%      | 2.2%      |       |
| \$15,000 - \$24,999   | 6.3%      | 4.3%      | 2.9%      |       |
| \$25,000 - \$34,999   | 8.6%      | 5.4%      | 3.4%      |       |
| \$35,000 - \$49,999   | 9.5%      | 10.0%     | 6.6%      |       |
| \$50,000 - \$74,999   | 20.0%     | 16.8%     | 16.7%     |       |
| \$75,000 - \$99,999   | 16.1%     | 18.2%     | 15.6%     |       |
| \$100,000 - \$149,999   | 15.7%     | 20.9%     | 27.6%     |       |
| \$150,000 - \$199,999   | 7.6%      | 8.0%      | 9.5%      |       |
| \$200,000+  | 11.9%     | 13.5%     | 15.5%     |       |
| Average Household Income  | \$113,406 | \$122,202 | \$135,684 | 2.21% |
| <b>2000 Owner Occupied Housing Units by Value:</b>                    |           |           |           |       |
| Total   | 4,471     |           |           |       |
| <\$50,000   | 0.1%      |           |           |       |
| \$50,000 - \$99,999   | 4.2%      |           |           |       |
| \$100,000 - \$149,999   | 16.8%     |           |           |       |
| \$150,000 - \$199,999   | 19.1%     |           |           |       |
| \$200,000 - \$299,999   | 28.6%     |           |           |       |
| \$300,000 - \$499,999   | 19.1%     |           |           |       |
| \$500,000 - \$999,999   | 10.6%     |           |           |       |
| \$1,000,000 +   | 1.6%      |           |           |       |
| Average Home Value  | \$296,111 |           |           |       |
| <b>2000 Specified Renter Occupied Housing Units by Contract Rent:</b> |           |           |           |       |
| Total   | 342       |           |           |       |
| With Cash Rent  | 88.6%     |           |           |       |
| No Cash Rent  | 11.4%     |           |           |       |
| Median Rent   | \$768     |           |           |       |
| Average Rent  | \$783     |           |           |       |

Source: Esri

## Demographics

Population in the Trade Area is expected to grow modestly between 2010 and 2015, increasing from 14,636 to 14,882. By 2015, more than 80% of the population in the Trade Area is expected to be 18 years or older with the majority (56.9%) of the population between the ages of 35 and 74. Nearly 97% of the Trade Area population is white. The Trade Area population is well educated with nearly half (46%) of the population having a bachelor's degree or higher. More than 74% of the Trade Area population works in white-collar occupations.

### Trade Area Demographics

|   | 2000   | 2010   | 2015   |
|---|--------|--------|--------|
| <b>Population by Age:</b>                             |        |        |        |
| Total   | 13,679 | 14,636 | 14,882 |
| 0 – 4   | 5.0%   | 4.4%   | 4.2%   |
| 5 – 9   | 6.8%   | 5.3%   | 5.2%   |
| 10 – 14   | 7.9%   | 6.6%   | 6.3%   |
| 15 – 24   | 10.3%  | 10.4%  | 10.0%  |
| 25 – 34   | 6.6%   | 7.2%   | 7.7%   |
| 35 – 44   | 16.5%  | 10.2%  | 10.1%  |
| 45 – 54   | 19.3%  | 18.2%  | 15.2%  |
| 55 – 64   | 12.9%  | 18.0%  | 18.3%  |
| 65 – 74   | 8.0%   | 10.7%  | 13.3%  |
| 75 – 84   | 4.8%   | 6.2%   | 6.5%   |
| 85 +  | 1.9%   | 2.8%   | 3.1%   |
| 18 +  | 75.5%  | 79.4%  | 80.2%  |
| <b>Population by Sex:</b>                             |        |        |        |
| Males   | 49.4%  | 48.9%  | 48.8%  |
| Females   | 50.6%  | 51.1%  | 51.2%  |
| <b>Population by Race/Ethnicity:</b>                  |        |        |        |
| Total   | 13,680 | 14,638 | 14,880 |
| White Alone   | 97.4%  | 96.3%  | 95.7%  |
| Black Alone   | 0.6%   | 0.8%   | 0.9%   |
| American Indian Alone                                 | 0.1%   | 0.1%   | 0.2%   |
| Asian or Pacific Islander Alone                       | 1.1%   | 1.5%   | 1.8%   |
| Some Other Race Alone                                 | 0.1%   | 0.2%   | 0.3%   |
| Two or More Races                                     | 0.7%   | 1.0%   | 1.1%   |
| Hispanic Origin                                       | 0.5%   | 0.9%   | 1.1%   |
| Diversity Index                                       | 6.1    | 8.8    | 10.3   |
| <b>2010 Population 25+ by Educational Attainment:</b> |        |        |        |
| Total   |        | 10,735 |        |
| Less Than 9th Grade                                   |        | 0.6%   |        |
| 9th to 12th Grade, No Diploma                         |        | 3.4%   |        |
| High School Graduate                                  |        | 23.4%  |        |
| Some College, No Degree                               |        | 19.6%  |        |
| Associate Degree                                      |        | 6.7%   |        |
| Bachelor's Degree                                     |        | 26.9%  |        |
| Graduate/Professional Degree                          |        | 19.3%  |        |

Source: Esri

### Trade Area Labor Force Characteristics

|  | 2000  | 2010  | 2015  |
|--|-------|-------|-------|
| <b>Civilian Population 16+ in Labor Force:</b>   |       |       |       |
| Civilian Employed                                | 62.4% | 90.1% | 91.9% |
| Civilian Unemployed                              | 2.2%  | 9.9%  | 8.1%  |
| <b>2010 Employed Population 16+ by Industry:</b> |       |       |       |
| Total  |       | 6,946 |       |



|   | 2000  | 2010  | 2015 |
|---|-------|-------|------|
| Agriculture/Mining  |       | 1.0%  |      |
| Construction  |       | 5.7%  |      |
| Manufacturing   |       | 11.5% |      |
| Wholesale Trade   |       | 5.1%  |      |
| Retail Trade  |       | 8.9%  |      |
| Transportation/Utilities                                    |       | 3.9%  |      |
| Information   |       | 1.6%  |      |
| Finance/Insurance/Real Estate                               |       | 7.6%  |      |
| Services  |       | 51.4% |      |
| Public Administration                                       |       | 3.2%  |      |
| <b>2010 Employed Population 16+ by Occupation:</b>          |       |       |      |
| Total   |       | 6,949 |      |
| White Collar  |       | 74.1% |      |
| Management/Business/Financial                               |       | 21.2% |      |
| Professional  |       | 30.2% |      |
| Sales   |       | 12.2% |      |
| Administrative Support                                      |       | 10.5% |      |
| Services  |       | 11.8% |      |
| Blue Collar   |       | 14.2% |      |
| Farming/Forestry/Fishing                                    |       | 0.3%  |      |
| Construction/Extraction                                     |       | 3.9%  |      |
| Installation/Maintenance/Repair                             |       | 2.5%  |      |
| Production  |       | 3.2%  |      |
| Transportation/Material Moving                              |       | 4.1%  |      |
| <b>2000 Workers 16+ by Means of Transportation to Work:</b> |       |       |      |
| Total   | 6,612 |       |      |
| Drove Alone - Car, Truck, or Van                            | 87.8% |       |      |
| Carpooled - Car, Truck, or Van                              | 4.4%  |       |      |
| Public Transportation                                       | 0.3%  |       |      |
| Walked  | 1.1%  |       |      |
| Other Means   | 0.6%  |       |      |
| Worked at Home  | 5.8%  |       |      |
| <b>2000 Workers 16+ by Travel Time to Work:</b>             |       |       |      |
| Total   | 6,612 |       |      |
| Did not Work at Home  | 94.2% |       |      |
| Less than 5 minutes   | 2.7%  |       |      |
| 5 to 9 minutes  | 8.6%  |       |      |
| 10 to 19 minutes  | 23.3% |       |      |
| 20 to 24 minutes  | 16.9% |       |      |
| 25 to 34 minutes  | 23.8% |       |      |
| 35 to 44 minutes  | 9.1%  |       |      |
| 45 to 59 minutes  | 7.6%  |       |      |
| 60 to 89 minutes  | 1.3%  |       |      |
| 90 or more minutes  | 0.9%  |       |      |
| Worked at Home  | 5.8%  |       |      |
| Average Travel Time to Work (in min)                        | 24.5  |       |      |

Source: Esri



## Lifestyles Characteristics

Social scientists and corporate marketers have used a method called segmentation for years to group people with similar behaviors, tastes, lifestyles, ages, etc. Segmentation incorporates a wide array of data in order to measure, forecast and target potential customers. For this report, we utilized Esri's Tapestry Segmentation system to assess the various lifestyle classifications or segments of the Trade Area population. The various segments are referred to as Lifestyle Groups in this report. The analysis, based on 2010 households in the Trade Area, indicated that the top three households in the Trade Area were: (1) Exurbanites, (2) Connoisseurs and (3) Prosperous Empty Nesters.

The lifestyle groups in Richfield's Trade Area are relatively similar with like behaviors, tastes, etc. This makes it somewhat easier to target retail sub-sectors that would meet the demands of Trade Area households. Below is a description of the top three lifestyle groups (source: Esri, Tapestry Segmentation, Reference Guide).

### *Exurbanites*

Residents prefer an affluent lifestyle in open spaces beyond the urban fringe. Although 40% are empty nesters, another 32% are married couples with children still living at home. Half of the householders are aged between 45 and 64 years. They may be part of the "sandwich generation," because their median age of 45.1 years places them directly between paying for children's college expenses and caring for elderly parents. There is little ethnic diversity; most residents are white.

The 66% labor force participation rate is above average. Approximately half work in substantive professional or management positions. These residents are educated; more than 40% of the population aged 25 years and older holds a bachelor's or graduate degree; approximately 75% have attended college. The median net worth is \$395,293, approximately four times the national figure. The median household income is \$87,339. More than 20% earn retirement income; another 57% receive additional income from investments.

Although *Exurbanites* neighborhoods are growing by 2.1% annually, they are not the newest areas. Most are single-family homes. Because *Exurbanites* cannot take advantage of public transportation, nearly 80% of the households own at least two vehicles. Their average commute time to work is comparable to the U.S. average.

Because of their stage in life, *Exurbanites* residents focus on financial security. They consult with financial planners; have IRA accounts; own shares in money market funds, mutual funds, and tax-exempt funds; own common stock; and track their investments online. Between long-term care insurance and substantial life insurance policies, they are well insured. Many have home equity lines of credit. To improve their properties, *Exurbanites* residents work on their homes, lawns and gardens. They buy lawn and garden care products, shrubs and plants. Although they will also work on home improvements such as interior and exterior painting, they hire contractors for more complicated

projects. To help them complete their projects, they own all kinds of home improvement tools such as saws, sanders and wallpaper strippers.

They are very physically active; they lift weights, practice yoga and jog to stay fit. They also go boating, hiking and kayaking; play Frisbee; take photos; and go bird watching. When vacationing in the United States, they hike, downhill ski, play golf, attend live theater and see the sights. This is the top market for watching college basketball and professional football games. They listen to public and news/talk radio. They participate in civic activities, serve on committees of local organizations, address public meetings and help with fundraising. Many are members of charitable organizations.

### *Connoisseurs*

Residents are somewhat older, with a median age of 46.8 years. Approximately 70% of the population is married. Although residents appear closer to retirement than child-rearing age, 30% of the households are married couples with children living at home. Ethnic diversity is negligible.

With a median net worth of \$771,146, *Connoisseurs* are second in affluence only to the *Top Rung* tapestry segment. This market is well educated; 64% of the population aged 25 years and older hold a bachelor's or graduate degree. Employed residents earn wages from high-paying management, professional and sales jobs. Many are self-employed; the rate is twice that of the national average. They have a median household income of \$127,739 and supplement their salaries with income from interest, dividends and rental properties.

*Connoisseurs'* neighborhoods are usually slow-growing, established, affluent areas. Most of their homes are single-family structures; 88% own their homes. Commuting is a way of life; compared to the U.S. average, more *Connoisseurs* residents live in a different state from where they work.

*Connoisseurs* residents may be second to *Top Rung* in wealth, but they are tops for conspicuous consumption. Their homes include the latest upgrades. Residents hire contractors for home improvement and remodeling projects, lawn care, landscaping services for property upkeep and professional housecleaning services. Households have burglar alarms for home security, and residents belong to the AAA auto club for vehicle security. They grind their own gourmet coffee beans. This is one of the top markets for owning or leasing a luxury car or convertible equipped with a navigational system. Exercise is a priority: they work out weekly at a club or other facility, ski, play golf and tennis, practice yoga and jog. They also buy the latest sports attire to look good while exercising. They travel abroad and in the United States, go to museums, and attend theater and dance performances. They go online to make travel plans, track and trade their investments and shop. They order from high-end catalogs and shop in person at service-oriented department stores.

*Connoisseurs'* residents are well read. They read history books; mysteries; biographies; two or more daily newspapers; and epicurean, travel, finance and business magazines. Residents listen to classical music as well as public, all-news, news/talk and all-talk radio. Active in their communities, they work for political candidates or parties, write or visit elected officials and participate in local civic issues. They eat out several times a week, but, for fun, will cook at home occasionally.

### *Prosperous Empty Nesters*

Approximately 6 in 10 householders in *Prosperous Empty Nesters* neighborhoods are aged 55 years or older. Forty percent (40%) of the households are composed of married couples with no children living at home. Residents are enjoying the move from child-rearing to retirement. The median age is 48.6 years. Population in this segment is increasing slowly at 0.7% annually; however, the pace will probably accelerate as the Baby Boomers mature. *Prosperous Empty Nesters* residents are not ethnically diverse; approximately 90% are white.

With a median net worth of \$275,233, *Prosperous Empty Nesters* invest prudently for the future. The median household income is \$69,227. Although 71% of the households earn income from wages and salaries, 59% receive investment income, 30% collect Social Security benefits, and 28% receive retirement income. Forty-one percent (41%) of residents aged 25 years and older hold bachelor's or graduate degrees; nearly 70% have attended college. Many residents who are still working have solid professional and management careers, especially in the education and health care industry sectors.

*Prosperous Empty Nesters* residents value their health and financial well-being. Their investments include annuities, certificates of deposit held longer than six months, mutual funds, money market funds, tax-exempt funds and common stock. They hold universal life insurance policies. Residents exercise regularly and take a multitude of vitamins. They refinish furniture and play golf. They also attend golf tournaments and sports events, particularly baseball games and college football games. They order by phone from catalogs and use coupons. Households are likely to own or lease a luxury car.

*Prosperous Empty Nesters* residents take pride in their homes and communities, so home remodeling, improvements, and lawn care are priorities. Residents will join a civic club or charitable organization, help with fund-raising, write to a newspaper editor, and volunteer. They travel extensively in the U.S. and abroad. They read biographies, mysteries, and history books; two or more daily newspapers; and business or fitness magazines. They watch golf, news and talk programs on TV.

## **Retail Business Mix in Trade Area**

For this analysis, retail businesses in the Trade Area have been ordered in the following retail industry subsectors:

- NAICS 441 – Motor Vehicle & Parts Dealers
- NAICS 442 – Furniture & Home Furnishing Stores
- NAICS 443 – Electronics & Appliance Stores
- NAICS 444 – Building Materials, Garden Equipment & Supplies Stores
- NAICS 445 – Food & Beverage Stores (e.g., groceries, specialty foods, beer/wine/liquor)
- NAICS 446 – Health & Personal Care Stores
- NAICS 447 – Gasoline Stations
- NAICS 448 – Clothing & Accessories Stores
- NAICS 451 – Sporting Goods, Hobbies, Books and Music Stores
- NAICS 452 – General Merchandise Store (e.g., department stores)
- NAICS 453 – Miscellaneous Retail Stores (e.g., florist, office supplies, secondhand goods)

- NAICS 722 – Food Services & Drinking Places

The top three retail categories (measured by number of stores) within the Trade Area (10-mile radius of the intersection of Wheatley Road and Brecksville Road) are Food Services & Drinking Places (95), Clothing & Accessories Stores (75) and Miscellaneous Retail Stores (47).

***Retail Business Mix within the Trade Area vs. Richfield***

| NAICS | Retail Category  | Trade Area<br>No. of<br>Establ. | Trade Area<br>% | Richfield<br>No. of<br>Establ. | Richfield<br>% |
|-------|--|---------------------------------|-----------------|--------------------------------|----------------|
| 441   | Motor Vehicle & Parts Dealers                          | 21                              | 5.0%            | 1                              | 3.8%           |
| 442   | Furniture & Home Furnishing Stores                     | 20                              | 4.8%            |                                |                |
| 443   | Electronics & Appliance Stores                         | 30                              | 7.2%            |                                |                |
| 444   | Building Materials, Garden Equipment & Supplies Stores | 29                              | 7.0%            | 3                              | 11.6%          |
| 445   | Food & Beverage Stores                                 | 20                              | 4.8%            | 2                              | 7.7%           |
| 446   | Health & Personal Care Stores                          | 26                              | 6.3%            |                                |                |
| 447   | Gasoline Stations                                      | 10                              | 2.4%            | 2                              | 7.7%           |
| 448   | Clothing & Accessories Stores                          | 75                              | 18.0%           | 2                              | 7.7%           |
| 451   | Sporting Goods, Hobbies, Books and Music Stores        | 30                              | 7.2%            | 1                              | 3.8%           |
| 452   | General Merchandise Store                              | 13                              | 3.1%            |                                |                |
| 453   | Miscellaneous Retail Stores                            | 47                              | 11.3%           | 1                              | 3.8%           |
| 722   | Food Services & Drinking Places                        | 95                              | 22.8%           | 14                             | 53.9%          |
|       | <b>Total</b>   | <b>416</b>                      | <b>100%</b>     | <b>26</b>                      | <b>100%</b>    |

Source: Esri and Infogroup

## RETAIL MARKETPLACE ACTIVITY

Retail market analyses typically use two metrics for measuring retail activity in a geographic area – supply and demand. Retail sales (i.e., retail business revenues) indicate market supply. Market demand or *retail potential* is a function of consumer spending in an area. Retail Gap – also referred to as the Leakage/Surplus Factor in this report – represents the difference between the demand for retail goods, including food and drink in an area less the supply of retail goods (i.e., retail sales) by businesses in the area.

For this project, Esri’s Retail MarketPlace dataset was used to gather supply and demand data about the Trade Area. Data was from 2010 and represents the most current numbers available. Esri utilizes a number of data sources to compile the Retail MarketPlace database, including, but not limited to:

- 2007 Census of Retail Trade (CRT) from the U.S. Census Bureau
- Monthly Retail Trade (MRT) data from the U.S. Census Bureau



- Business data from Infogroup
- Census Bureau’s Nonemployer Statistics (NES) division
- Bureau of Labor Statistics annual Consumer Expenditure Survey

### Retail Gap (Leakage/Surplus Factor)

Retail opportunity is measured by a leakage or surplus – the positive or negative gap between demand and supply. A positive Retail Gap indicates consumers are likely leaving an area to purchase goods and services, this is known as leakage. In other words, area businesses are not supplying enough goods and services to meet customers’ demands. Leakage may indicate an opportunity to grow retail sales in an area. However, it should be noted that just because leakage may exist, it does not necessarily mean that an area could attract retail businesses to fill the unmet demand. A negative Retail Gap indicates a surplus of retail sales – a market where customers are drawn in from outside an area. Esri measures retail potential using a *Leakage/Surplus Factor*, which is a measure of the relationship between supply and demand that ranges from +100 (total leakage) to -100 (total surplus). A Leakage/Surplus Factor of zero (0) indicates a balanced market where supply equals demand. Refer to Appendix A for Leakage/Surplus Factor charts for the Trade Area.

Within the Trade Area (10-minute drive from the WDA), there is a significant surplus of retail sales for total retail trade and food and drink (i.e., restaurants) as shown in the table below. According to the retail data, there is a total surplus or excess supply of retail sales in the Trade Area of more than \$426 million, indicating a market where customers are drawn from outside the Trade Area. It should be noted that non-store retailers such as mail-order houses and direct selling establishments were excluded to provide a truer picture of the traditional, storefront retail marketplace – non-store retailers constituted a leakage of more than \$16.8 million.

***Leakage/Surplus of Total Retail Trade and Food & Drink in the Trade Area  
(Based on 2010 Sales)***

| Industry Summary                    | NAICS     | Demand (Retail Potential) | Supply (Retail Sales) | Retail Gap            |
|-------------------------------------|-----------|---------------------------|-----------------------|-----------------------|
| Total Retail Trade and Food & Drink | 44-45,722 | \$405,669,187             | \$815,476,905         | <b>-\$426,650,220</b> |
| Total Retail Trade                  | 44-45     | \$344,792,936             | \$727,003,445         | <b>-\$399,053,012</b> |
| Total Food & Drink                  | 722       | \$60,876,252              | \$88,473,460          | <b>-\$27,597,208</b>  |

Source: Esri

A closer look at the data shows that only one retail industry subsector in the Trade Area (Motor Vehicle & Parts Dealers – NAICS 441) had unmet demand. Smaller trade areas typically have unmet demand in the Motor Vehicle & Parts Dealers subsector as automobile and parts dealers, in recent years, have been



clustering a variety of dealerships and related services into car-buying retail centers that are designed to draw shoppers from a large region or trade area.

**Leakage/Surplus of Retail Industry Subsectors in the Trade Area**  
(Based on 2010 Sales)

| Industry Group                                 | NAICS    | Demand<br>(Retail<br>Potential) | Supply<br>(Retail Sales) | Retail Gap     |
|--|----------|---------------------------------|--------------------------|----------------|
| Motor Vehicle & Parts Dealers                  | 441      | \$87,084,091                    | \$59,923,085             | \$27,161,006   |
| Furniture & Home Furnishings Stores            | 442      | \$8,174,661                     | \$25,249,137             | -\$17,074,475  |
| Electronics & Appliance Stores                 | 4431     | \$10,533,539                    | \$33,687,246             | -\$23,153,706  |
| Bldg. Materials, Garden Equip. & Supply Stores | 444      | \$15,515,912                    | \$247,768,404            | -\$232,252,492 |
| Food & Beverage Stores                         | 445      | \$55,271,385                    | \$73,852,547             | -\$18,581,162  |
| Health & Personal Care Stores                  | 446,4461 | \$17,513,137                    | \$35,887,060             | -\$18,373,923  |
| Gasoline Stations                              | 447,4471 | \$55,041,081                    | \$76,051,782             | -\$21,010,701  |
| Clothing & Clothing Accessories Stores         | 448      | \$11,448,880                    | \$55,046,567             | -\$43,597,687  |
| Sporting Goods, Hobby, Book & Music Stores     | 451      | \$7,031,951                     | \$15,284,343             | -\$8,252,392   |
| General Merchandise Stores                     | 452      | \$52,327,621                    | \$91,322,360             | -\$38,994,739  |
| Miscellaneous Store Retailers                  | 453      | \$7,731,019                     | \$12,653,760             | -\$4,922,741   |
| Food Services & Drinking Places                | 722      | \$60,876,252                    | \$88,473,460             | -\$27,597,208  |

Source: Esri

Although the net retail industry subsector numbers show a significant surplus of sales for the Trade Area, there may be certain retail groups – divisions of subsectors – with leakage or unmet demand. Esri classifies data into 27 industry subsectors and groups in the Retail Trade sector, as well as four industry groups within the Food Services & Drinking Establishments subsector. Retail data at the subsector and group level in the Trade Area is presented in the table below.

Based on the leakage factors (unmet demand) identified in the table below, excluding the Motor Vehicle & Parts Dealers subsector, four industry groups showed unmet demand that could possibly be served through additional sales by existing or new businesses in those industry groups. Those industry groups with unmet demand include: Beer, Wine & Liquor Stores; Used Merchandise Stores; Special Food Services (e.g., caterers, mobile food services, airline food service contractors); and Drinking Places – Alcoholic Beverages. Given the industry groups and the relatively low amount of unmet demand, it is likely that the leakage in those industries is being served adequately by businesses just outside the Trade Area. Therefore, those industry groups most likely do not present a reasonable opportunity for new retail growth.

**Leakage/Surplus of Retail Industry Subsectors/Groups in the Trade Area  
(Based on 2010 Sales)**

| Industry Group                                 | NAICS    | Demand<br>(Retail<br>Potential) | Supply<br>(Retail Sales) | Retail Gap     | Leakage/<br>Surplus<br>Factor |
|--|----------|---------------------------------|--------------------------|----------------|-------------------------------|
| Motor Vehicle & Parts Dealers                  | 441      | \$87,084,091                    | \$59,923,085             | \$27,161,006   | 18.5                          |
| Automobile Dealers                             | 4411     | \$70,311,617                    | \$48,798,517             | \$21,513,100   | 18.1                          |
| Other Motor Vehicle Dealers                    | 4412     | \$8,320,327                     | \$5,012,948              | \$3,307,379    | 24.8                          |
| Auto Parts, Accessories & Tire Stores          | 4413     | \$8,452,147                     | \$6,111,620              | \$2,340,528    | 16.1                          |
| Furniture & Home Furnishings Stores            | 442      | \$8,174,661                     | \$25,249,137             | -\$17,074,475  | -51.1                         |
| Furniture Stores                               | 4421     | \$5,736,079                     | \$15,390,142             | -\$9,654,063   | -45.7                         |
| Home Furnishings Stores                        | 4422     | \$2,438,582                     | \$9,858,995              | -\$7,420,412   | -60.3                         |
| Electronics & Appliance Stores                 | 4431     | \$10,533,539                    | \$33,687,246             | -\$23,153,706  | -52.4                         |
| Bldg. Materials, Garden Equip. & Supply Stores | 444      | \$15,515,912                    | \$247,768,404            | -\$232,252,492 | -88.2                         |
| Bldg. Material & Supplies Dealers              | 4441     | \$13,893,214                    | \$242,870,829            | -\$228,977,616 | -89.2                         |
| Lawn & Garden Equip & Supply Stores            | 4442     | \$1,622,698                     | \$4,897,575              | -\$3,274,877   | -50.2                         |
| Food & Beverage Stores                         | 445      | \$55,271,385                    | \$73,852,547             | -\$18,581,162  | -14.4                         |
| Grocery Stores                                 | 4451     | \$51,771,973                    | \$71,243,926             | -\$19,471,953  | -15.8                         |
| Specialty Food Stores                          | 4452     | \$1,414,127                     | \$2,276,124              | -\$861,996     | -23.4                         |
| Beer, Wine & Liquor Stores                     | 4453     | \$2,085,285                     | \$332,497                | \$1,752,788    | 72.5                          |
| Health & Personal Care Stores                  | 446,4461 | \$17,513,137                    | \$35,887,060             | -\$18,373,923  | -34.4                         |
| Gasoline Stations                              | 447,4471 | \$55,041,081                    | \$76,051,782             | -\$21,010,701  | -16.0                         |
| Clothing & Clothing Accessories Stores         | 448      | \$11,448,880                    | \$55,046,567             | -\$43,597,687  | -65.6                         |
| Clothing Stores                                | 4481     | \$8,340,889                     | \$48,256,841             | -\$39,915,951  | -70.5                         |
| Shoe Stores                                    | 4482     | \$1,396,121                     | \$2,557,116              | -\$1,160,995   | -29.4                         |
| Jewelry, Luggage & Leather Goods Stores        | 4483     | \$1,711,870                     | \$4,232,611              | -\$2,520,740   | -42.4                         |
| Sporting Goods, Hobby, Book & Music Stores     | 451      | \$7,031,951                     | \$15,284,343             | -\$8,252,392   | -37.0                         |
| Sporting Goods/Hobby/Musical Instr. Stores     | 4511     | \$4,618,043                     | \$8,977,641              | -\$4,359,598   | -32.1                         |
| Book, Periodical & Music Stores                | 4512     | \$2,413,908                     | \$6,306,702              | -\$3,892,794   | -44.6                         |
| General Merchandise Stores                     | 452      | \$52,327,621                    | \$91,322,360             | -\$38,994,739  | -27.1                         |
| Department Stores Excluding Leased Depts.      | 4521     | \$17,947,894                    | \$34,962,631             | -\$17,014,737  | -32.2                         |
| Other General Merchandise Stores               | 4529     | \$34,379,727                    | \$56,359,729             | -\$21,980,002  | -24.2                         |
| Miscellaneous Store Retailers                  | 453      | \$7,731,019                     | \$12,653,760             | -\$4,922,741   | -24.1                         |
| Florists                                       | 4531     | \$633,117                       | \$1,306,793              | -\$673,676     | -34.7                         |
| Office Supplies, Stationery & Gift Stores      | 4532     | \$2,058,743                     | \$5,769,380              | -\$3,710,637   | -47.4                         |
| Used Merchandise Stores                        | 4533     | \$644,206                       | \$125,616                | \$518,590      | 67.4                          |
| Other Miscellaneous Store Retailers            | 4539     | \$4,394,954                     | \$5,451,972              | -\$1,057,018   | -10.7                         |
| Food Services & Drinking Places                | 722      | \$60,876,252                    | \$88,473,460             | -\$27,597,208  | -18.5                         |
| Full-Service Restaurants                       | 7221     | \$27,494,085                    | \$32,377,934             | -\$4,883,849   | -8.2                          |
| Limited-Service Eating Places                  | 7222     | \$26,602,944                    | \$54,016,521             | -\$27,413,577  | -34.0                         |
| Special Food Services                          | 7223     | \$5,070,037                     | \$1,821,302              | \$3,248,734    | 47.1                          |
| Drinking Places - Alcoholic Beverages          | 7224     | \$1,709,186                     | \$257,702                | \$1,451,484    | 73.8                          |

Source: Esri



## Retail Demand Projections

Although the data did not reveal any reasonable potential for additional retail sales in the Trade Area currently, we can analyze projected household and business growth in the Trade Area to forecast potential future retail demand.

### Households

The Esri data forecasts 120 additional households in the Trade Area between 2010 and 2015. In addition, the Planning Study projects 82,000 square feet of new residential apartments. Assuming an average of 1,500 square feet per unit, the Planning Study estimates 55 additional households. The current number of Trade Area households is assumed to be 5,271 based on the 2010 Esri data. Using the household projections from Esri and the Planning Study (175 total households), estimated increases in retail demand was calculated in the table below.

*Estimated Increase in Retail Demand by Households*

| Industry Group                                 | NAICS    | Demand (Retail Potential) | Demand per household | Est. demand increase |
|--|----------|---------------------------|----------------------|----------------------|
| Motor Vehicle & Parts Dealers                  | 441      | \$87,084,091              | \$16,521             | \$2,891,175          |
| Furniture & Home Furnishings Stores            | 442      | \$8,174,661               | \$1,551              | \$271,425            |
| Electronics & Appliance Stores                 | 4431     | \$10,533,539              | \$1,998              | \$349,650            |
| Bldg. Materials, Garden Equip. & Supply Stores | 444      | \$15,515,912              | \$2,944              | \$515,200            |
| Food & Beverage Stores                         | 445      | \$55,271,385              | \$10,486             | \$1,835,050          |
| Health & Personal Care Stores                  | 446,4461 | \$17,513,137              | \$3,323              | \$581,525            |
| Gasoline Stations                              | 447,4471 | \$55,041,081              | \$10,442             | \$1,827,350          |
| Clothing & Clothing Accessories Stores         | 448      | \$11,448,880              | \$2,172              | \$380,100            |
| Sporting Goods, Hobby, Book & Music Stores     | 451      | \$7,031,951               | \$1,334              | \$233,450            |
| General Merchandise Stores                     | 452      | \$52,327,621              | \$9,927              | \$1,737,225          |
| Miscellaneous Store Retailers                  | 453      | \$7,731,019               | \$1,467              | \$256,725            |
| Food Services & Drinking Places                | 722      | \$60,876,252              | \$11,549             | \$2,021,075          |
| <b>TOTAL</b>                                   |          |                           |                      | <b>\$12,899,950</b>  |

*Source: Esri and MB3 Consulting*

### Businesses

This year the International Council of Shopping Centers (ICSC) completed a research study of daytime retail spending by office workers. That report, titled Office-Worker Retail Spending in a Digital Age, identified office-worker retail spending by variables such as retail category, geography (e.g., downtown vs. suburban), age, gender, occupation and others. The table below shows information about suburban office-worker spending by retail category.

### *Mean Spending by Suburban Office Workers*

| Spending Category                                   | Weekly   | Annual      |
|---|----------|-------------|
| <b>Total</b>  | \$221.65 | \$11,525.80 |
| <b>Transportation and Online Purchases</b>          | \$80.14  | \$4,167.28  |
| Transportation                                      | \$37.67  | \$1,958.84  |
| <b>Online Purchases Made at the Office</b>          | \$42.47  | \$2,208.44  |
| <b>Full-Service Restaurants and Fast Food</b>       | \$28.86  | \$1,500.72  |
| Full-Service Restaurants                            | \$13.06  | \$679.12    |
| Fast Food/Deli/Lunch Eateries                       | \$15.80  | \$821.60    |
| <b>Goods and Services</b>                           | \$112.65 | \$5,857.80  |
| Department Stores                                   | \$9.03   | \$469.56    |
| Discount Stores                                     | \$11.33  | \$589.16    |
| Drug Stores   | \$7.60   | \$395.20    |
| Grocery Stores                                      | \$21.58  | \$1,122.16  |
| Clothing Stores                                     | \$4.43   | \$230.36    |
| Shoe Stores   | \$3.40   | \$176.80    |
| Sporting Goods                                      | \$3.49   | \$181.48    |
| Electronics/Phone/Computers                         | \$8.93   | \$464.36    |
| Jewelry   | \$3.75   | \$195.00    |
| Office Suppliers/Stationery/Novelty Gifts and Cards | \$7.41   | \$385.32    |
| Warehouse Clubs                                     | \$12.32  | \$640.64    |
| Other Goods (florists, non-food vendors)            | \$3.75   | \$195.00    |
| Personal Care                                       | \$5.76   | \$299.52    |
| Personal Services                                   | \$4.97   | \$258.44    |
| Other Services (not elsewhere classified)           | \$4.90   | \$254.80    |
| <b>Total Less Transportation and Online</b>         | \$141.51 | \$7,358.52  |

*Source: Niemira, Michael P. and Connolly, John. "Office-Worker Retail Spending in a Digital Age." International Council of Shopping Centers, p.14.*

According to data from CoreNet Global, the average office space per worker, measured in square feet, for all companies is 176 square feet today (<http://www.corenetglobal.org/>). Utilizing information about projected office building growth, office-worker spending, and office space per worker, we can forecast future retail demand from office business growth. For this analysis, light industrial demand was excluded as industrial workers typically do not leave their place of work during working hours to make retail purchases. Retail opportunities created by industrial workers are most likely limited to the purchase of convenience-oriented goods (e.g., gasoline, coffee, grocery, etc.) during the commute to and from work. The table below shows estimated increases in retail demand associated with projected office growth.



**Estimated Increase in Retail Demand by New Office Businesses**

| Industry Category                              | NAICS     | Avg. Annual Spending | Add'l Office Workers | Increased Demand    |
|--|-----------|----------------------|----------------------|---------------------|
| Motor Vehicle & Parts Dealers                  | 441       | (a)                  | 5,074                | -                   |
| Furniture & Home Furnishings Stores            | 442       | (a)                  | 5,074                | -                   |
| Electronics & Appliance Stores                 | 4431      | \$464.36             | 5,074                | \$2,356,099         |
| Bldg. Materials, Garden Equip. & Supply Stores | 444       | (a)                  | 5,074                | -                   |
| Food & Beverage Stores                         | 445       | \$1,122.16           | 5,074                | \$5,693,687         |
| Health & Personal Care Stores                  | 446, 4461 | \$953.16             | 5,074                | \$4,836,204         |
| Gasoline Stations                              | 447, 4471 | (a)                  | 5,074                | -                   |
| Clothing & Clothing Accessories Stores         | 448       | \$602.16             | 5,074                | \$3,055,278         |
| Sporting Goods, Hobby, Book & Music Stores     | 451       | \$181.48             | 5,074                | \$920,805           |
| General Merchandise Stores                     | 452       | \$1,699.36           | 5,074                | \$8,622,321         |
| Miscellaneous Store Retailers                  | 453       | \$835.12             | 5,074                | \$4,237,285         |
| Food Services & Drinking Places                | 722       | \$1,500.72           | 5,074                | \$7,614,449         |
| <b>TOTAL</b>                                   |           | <b>\$7,358.52</b>    | <b>5,074</b>         | <b>\$37,336,127</b> |

(a) Spending in these retail industries may have been included in one of the other industries in merging the data sets used.

**Total Projected Retail Demand Change**

Total retail demand in the Trade Area is forecasted to increase by \$50.24 million as a result of household growth forecasted by Esri as well as business growth identified in the Crossroads Planning Study. However, excluding Motor Vehicle & Parts Dealers, there is sufficient supply in the Trade Area at the industry group level to meet the associated demand increases.

**Total Estimated Increase in Retail Demand in the Trade Area**

| Industry Group                                 | NAICS    | Demand (Retail Potential) | Total Est. demand increase | Retail Gap    | Retail Gap Change |
|--|----------|---------------------------|----------------------------|---------------|-------------------|
| Motor Vehicle & Parts Dealers                  | 441      | \$87,084,091              | \$2,891,175                | \$27,161,006  | \$30,052,181      |
| Furniture & Home Furnishings Stores            | 442      | \$8,174,661               | \$271,425                  | -\$17,074,475 | -\$16,803,050     |
| Electronics & Appliance Stores                 | 4431     | \$10,533,539              | \$2,705,749                | -\$23,153,706 | -\$20,447,957     |
| Bldg. Materials, Garden Equip. & Supply Stores | 444      | \$15,515,912              | \$515,200                  | -             | -\$231,737,292    |
| Food & Beverage Stores                         | 445      | \$55,271,385              | \$7,528,737                | -\$18,581,162 | -\$11,052,425     |
| Health & Personal Care Stores                  | 446,4461 | \$17,513,137              | \$5,417,729                | -\$18,373,923 | -\$12,956,194     |
| Gasoline Stations                              | 447,4471 | \$55,041,081              | \$1,827,350                | -\$21,010,701 | -\$19,183,351     |
| Clothing & Clothing Accessories Stores         | 448      | \$11,448,880              | \$3,435,378                | -\$43,597,687 | -\$40,162,309     |
| Sporting Goods, Hobby, Book & Music Stores     | 451      | \$7,031,951               | \$1,154,255                | -\$8,252,392  | -\$7,098,137      |
| General Merchandise Stores                     | 452      | \$52,327,621              | \$10,359,546               | -\$38,994,739 | -\$28,635,193     |



| Industry Group                  | NAICS | Demand (Retail Potential) | Total Est. demand increase | Retail Gap    | Retail Gap Change |
|---------------------------------|-------|---------------------------|----------------------------|---------------|-------------------|
| Miscellaneous Store Retailers   | 453   | \$7,731,019               | \$4,494,010                | -\$4,922,741  | -\$428,731        |
| Food Services & Drinking Places | 722   | \$60,876,252              | \$9,635,524                | -\$27,597,208 | -\$17,961,684     |

## Hotels and Motels

Similar to the retail industry, Hotel and Motel opportunity is measured by a leakage or surplus – the positive or negative gap between demand and supply. A positive Hotel Gap indicates consumers are likely leaving the Trade Area to purchase these goods and services; in other words, Trade Area hotels and motels are not supplying enough goods and services to meet customers' local demands. Leakage may indicate an opportunity to grow accommodation sales in the Trade Area. A negative Hotel Gap indicates a surplus of accommodation sales – a market where customers are drawn in from outside the Trade Area.

For this project, data from *MIG, Inc.* – the sole-source provider of the IMPLAN® (IMPact analysis for PLANning) economic impact modeling system – was used to collect supply and demand data for the Hotel and Motel Industry (NAICS 721) in the Trade Area. Data was from 2010 and represents the most current numbers available. IMPLAN is used to create complete, extremely detailed Social Accounting Matrices and Multiplier Models of local economies. IMPLAN provides region-specific data to enable users to make in-depth examinations of state, multi-county, county, sub-county and metropolitan regional economies. *MIG* has been developing complex localized databases and distributing IMPLAN software to public and private organizations since 1993.

As shown in the table below, there is a slight surplus of sales for hotels and motels within the Trade Area (~10-minute drive from the WDA). According to the IMPLAN data, there is a total surplus or excess supply of hotel and motel sales in the Trade Area of just under \$1.48 million, indicating a market where customers are drawn from outside the Trade Area. Total local demand includes industry (i.e., businesses) and institutional (i.e., households and government) demands for accommodations in the Trade Area.

### *Leakage/Surplus of the Hotel Industry in the Trade Area (Based on 2010 Sales)*

| Industry Group                             | NAICS | Total Local Demand | Supply (Sales) | Hotel Gap    |
|--|-------|--------------------|----------------|--------------|
| Hotels and Motels, including Casino Hotels | 721   | \$20,376,885       | \$21,854,870   | -\$1,477,985 |

Source: *MIG, Inc. (IMPLAN)*

## Hotel Demand Projections

Although the data did not reveal potential for additional accommodation sales in the Trade Area currently, we can analyze projected business and household growth in the Trade Area to forecast potential future hotel and motel demand.

Local demand by households for hotel and motel accommodations is \$10,395,822 based on the IMPLAN data. That equals approximately \$1,972.27 ( $\$10,395,822 / 5,271$ ) of annual demand per household. Using the household projections from Esri and the Planning Study of 175 total new households, the estimated increase in hotel and motel demand by households in the Trade Area is \$345,147 ( $\$1,972.27 * 175$ ). According to the IMPLAN data, local demand by industry (i.e., businesses) for hotel and motel accommodations averages approximately \$108.18 per Trade Area employee annually ( $\$8,517,395 / 78,731.9$ ). Using the employment growth estimates previously calculated based on the Planning Study (5,074 additional office workers), the estimated increase in hotel and motel demand by industry in the Trade Area is \$548,905 ( $\$108.18 * 5,074$ ).

Total local demand for hotel and motel accommodations in the Trade Area is forecasted to increase by a little more than \$894,000 per year as a result of anticipated household and business growth. The total forecasted increase in demand for hotel and motel accommodations would cut the current Hotel Gap by more than half, leaving slightly less than \$600,000 of surplus supply.

### *Total Estimated Increase in Hotel and Motel Demand in the Trade Area*

| Industry Group                             | NAICS | Total Local Demand | Total Est. demand increase | Hotel Gap    | Hotel Gap Change |
|--|-------|--------------------|----------------------------|--------------|------------------|
| Hotels and Motels, including Casino Hotels | 721   | \$20,376,885       | \$894,052                  | -\$1,477,985 | -\$583,933       |

## CONCLUSIONS

Overall, the Trade Area has a sufficient amount of retail and hotel/motel services to meet the current demand as well as anticipated future demand, according to this analysis. Much of the unmet retail demand (leakage) from the Trade Area is associated with spending for automobiles and related purchases. Automobile and related retailers tend to locate regionally-focused stores in high traffic areas adjacent to other regional shopping centers. Within the Trade Area, those stores are primarily located in Fairlawn and Macedonia. Retail categories most likely to expand or locate in the Trade Area (i.e., Richfield) include those that sell convenience-oriented goods (e.g., food & beverage stores, grocery, etc.) and restaurants that could take advantage of the projected future demand created by the completion of the development scenarios outlined in the Crossroads Planning Study. All retail is not the same; tourist or destination-oriented (e.g., lifestyle centers) retail approaches may provide unique opportunities to serve markets beyond the traditional trade area.

## APPENDICES

### Appendix A – Esri – Retail Marketplace Profile (10-minute Drive)

| Summary Demographics                          |  | NAICS     | Demand<br>(Retail Potential) | Supply<br>(Retail Sales) | Retail Gap     | Leakage/Surplus<br>Factor | Number of<br>Businesses |
|---|--|-----------|------------------------------|--------------------------|----------------|---------------------------|-------------------------|
| 2010 Population                               |  |           |                              |                          |                |                           | 25,411                  |
| 2010 Households                               |  |           |                              |                          |                |                           | 9,590                   |
| 2010 Median Disposable Income                 |  |           |                              |                          |                |                           | \$64,198                |
| 2010 Per Capita Income                        |  |           |                              |                          |                |                           | \$44,362                |
| Industry Summary                              |  | NAICS     | Demand<br>(Retail Potential) | Supply<br>(Retail Sales) | Retail Gap     | Leakage/Surplus<br>Factor | Number of<br>Businesses |
| Total Retail Trade and Food & Drink           |  | 44-45,722 | \$405,669,187                | \$815,476,905            | -\$409,807,717 | -33.6                     | 416                     |
| Total Retail Trade                            |  | 44-45     | \$344,792,936                | \$727,003,445            | -\$382,210,509 | -35.7                     | 321                     |
| Total Food & Drink                            |  | 722       | \$60,876,252                 | \$88,473,460             | -\$27,597,208  | -18.5                     | 95                      |
| Industry Group                                |  | NAICS     | Demand<br>(Retail Potential) | Supply<br>(Retail Sales) | Retail Gap     | Leakage/Surplus<br>Factor | Number of<br>Businesses |
| Motor Vehicle & Parts Dealers                 |  | 441       | \$87,084,091                 | \$59,923,085             | \$27,161,006   | 18.5                      | 21                      |
| Automobile Dealers                            |  | 4411      | \$70,311,617                 | \$48,798,517             | \$21,513,100   | 18.1                      | 7                       |
| Other Motor Vehicle Dealers                   |  | 4412      | \$8,320,327                  | \$5,012,948              | \$3,307,379    | 24.8                      | 1                       |
| Auto Parts, Accessories & Tire Stores         |  | 4413      | \$8,452,147                  | \$6,111,620              | \$2,340,528    | 16.1                      | 13                      |
| Furniture & Home Furnishings Stores           |  | 442       | \$8,174,661                  | \$25,249,137             | -\$17,074,475  | -51.1                     | 20                      |
| Furniture Stores                              |  | 4421      | \$5,736,079                  | \$15,390,142             | -\$9,654,063   | -45.7                     | 9                       |
| Home Furnishings Stores                       |  | 4422      | \$2,438,582                  | \$9,858,995              | -\$7,420,412   | -60.3                     | 10                      |
| Electronics & Appliance Stores                |  | 4431      | \$10,533,539                 | \$33,687,246             | -\$23,153,706  | -52.4                     | 30                      |
| Bldg Materials, Garden Equip. & Supply Stores |  | 444       | \$15,515,912                 | \$247,768,404            | -\$232,252,492 | -88.2                     | 29                      |
| Bldg Material & Supplies Dealers              |  | 4441      | \$13,893,214                 | \$242,870,829            | -\$228,977,616 | -89.2                     | 19                      |
| Lawn & Garden Equip & Supply Stores           |  | 4442      | \$1,622,698                  | \$4,897,575              | -\$3,274,877   | -50.2                     | 10                      |
| Food & Beverage Stores                        |  | 445       | \$55,271,385                 | \$73,852,547             | -\$18,581,162  | -14.4                     | 20                      |
| Grocery Stores                                |  | 4451      | \$51,771,973                 | \$71,243,926             | -\$19,471,953  | -15.8                     | 12                      |
| Specialty Food Stores                         |  | 4452      | \$1,414,127                  | \$2,276,124              | -\$861,996     | -23.4                     | 6                       |
| Beer, Wine & Liquor Stores                    |  | 4453      | \$2,085,285                  | \$332,497                | \$1,752,788    | 72.5                      | 2                       |
| Health & Personal Care Stores                 |  | 446,4461  | \$17,513,137                 | \$35,887,060             | -\$18,373,923  | -34.4                     | 26                      |
| Gasoline Stations                             |  | 447,4471  | \$55,041,081                 | \$76,051,782             | -\$21,010,701  | -16.0                     | 10                      |
| Clothing & Clothing Accessories Stores        |  | 448       | \$11,448,880                 | \$55,046,567             | -\$43,597,687  | -65.6                     | 75                      |
| Clothing Stores                               |  | 4481      | \$8,340,889                  | \$48,256,841             | -\$39,915,951  | -70.5                     | 57                      |
| Shoe Stores                                   |  | 4482      | \$1,396,121                  | \$2,557,116              | -\$1,160,995   | -29.4                     | 7                       |
| Jewelry, Luggage & Leather Goods Stores       |  | 4483      | \$1,711,870                  | \$4,232,611              | -\$2,520,740   | -42.4                     | 11                      |
| Sporting Goods, Hobby, Book & Music Stores    |  | 451       | \$7,031,951                  | \$15,284,343             | -\$8,252,392   | -37.0                     | 30                      |
| Sporting Goods/Hobby/Musical Instr Stores     |  | 4511      | \$4,618,043                  | \$8,977,641              | -\$4,359,598   | -32.1                     | 28                      |

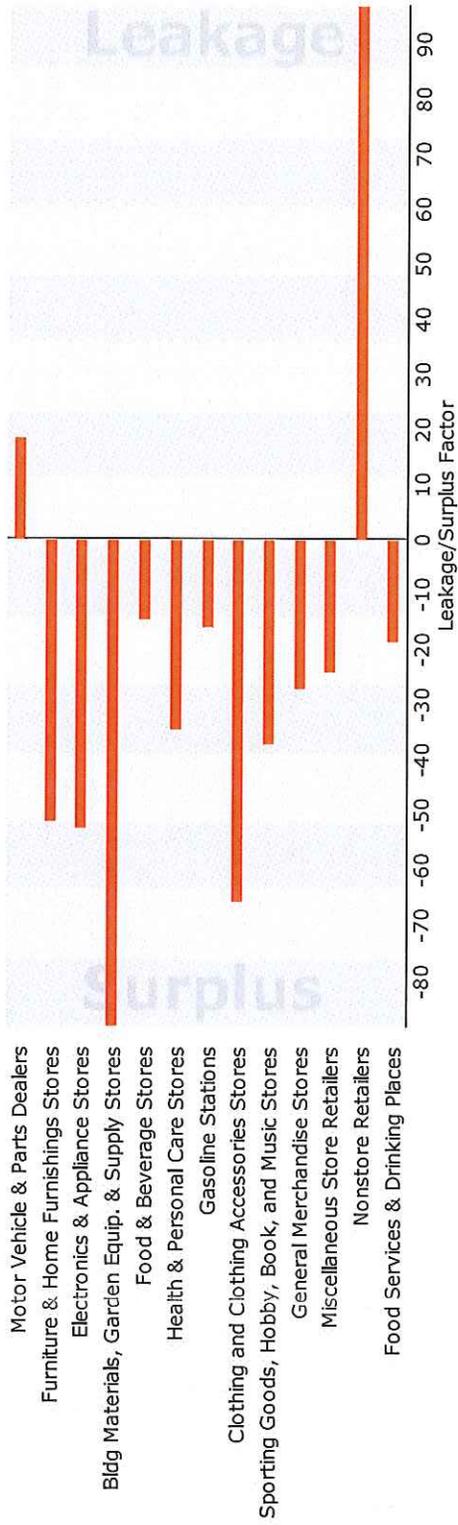
|   |      |              |              |               |       |    |
|---|------|--------------|--------------|---------------|-------|----|
| Book, Periodical & Music Stores           | 4512 | \$2,413,908  | \$6,306,702  | -\$3,892,794  | -44.6 | 3  |
| General Merchandise Stores                | 452  | \$52,327,621 | \$91,322,360 | -\$38,994,739 | -27.1 | 13 |
| Department Stores Excluding Leased Depts. | 4521 | \$17,947,894 | \$34,962,631 | -\$17,014,737 | -32.2 | 5  |
| Other General Merchandise Stores          | 4529 | \$34,379,727 | \$56,359,729 | -\$21,980,002 | -24.2 | 7  |
| Miscellaneous Store Retailers             | 453  | \$7,731,019  | \$12,653,760 | -\$4,922,741  | -24.1 | 47 |
| Florists                                  | 4531 | \$633,117    | \$1,306,793  | -\$673,676    | -34.7 | 7  |
| Office Supplies, Stationery & Gift Stores | 4532 | \$2,058,743  | \$5,769,380  | -\$3,710,637  | -47.4 | 12 |
| Used Merchandise Stores                   | 4533 | \$644,206    | \$125,616    | \$518,590     | 67.4  | 6  |
| Other Miscellaneous Store Retailers       | 4539 | \$4,394,954  | \$5,451,972  | -\$1,057,018  | -10.7 | 21 |
| Nonstore Retailers                        | 454  | \$17,119,658 | \$277,155    | \$16,842,503  | 96.8  | 1  |
| Electronic Shopping & Mail-Order Houses   | 4541 | \$12,564,895 | \$0          | \$12,564,895  | 100.0 | 0  |
| Vending Machine Operators                 | 4542 | \$1,163,060  | \$162,165    | \$1,000,895   | 75.5  | 1  |
| Direct Selling Establishments             | 4543 | \$3,391,703  | \$114,990    | \$3,276,714   | 93.4  | 0  |
| Food Services & Drinking Places           | 722  | \$60,876,252 | \$88,473,460 | -\$27,597,208 | -18.5 | 95 |
| Full-Service Restaurants                  | 7221 | \$27,494,085 | \$32,377,934 | -\$4,883,849  | -8.2  | 46 |
| Limited-Service Eating Places             | 7222 | \$26,602,944 | \$54,016,521 | -\$27,413,577 | -34.0 | 44 |
| Special Food Services                     | 7223 | \$5,070,037  | \$1,821,302  | \$3,248,734   | -47.1 | 3  |
| Drinking Places - Alcoholic Beverages     | 7224 | \$1,709,186  | \$257,702    | \$1,451,484   | 73.8  | 2  |

**Data Note:** Supply (retail sales) estimates sales to consumers by establishments. Sales to businesses are excluded. Demand (retail potential) estimates the expected amount spent by consumers at retail establishments. Supply and demand estimates are in current dollars. The Leakage/Surplus Factor presents a snapshot of retail opportunity. This is a measure of the relationship between supply and demand that ranges from +100 (total leakage) to -100 (total surplus). A positive value represents 'leakage' of retail opportunity outside the trade area. A negative value represents a surplus of retail sales, a market where customers are drawn in from outside the trade area. The Retail Gap represents the difference between Retail Potential and Retail Sales. Esri uses the North American Industry Classification System (NAICS) to classify businesses by their primary type of economic activity. Retail establishments are classified into 27 industry groups in the Retail Trade sector, as well as four industry groups within the Food Services & Drinking Establishments subsector. For more information on the Retail MarketPlace data, please view the methodology statement at <http://www.esri.com/library/whitepapers/pdfs/esri-data-retail-marketplace.pdf>.

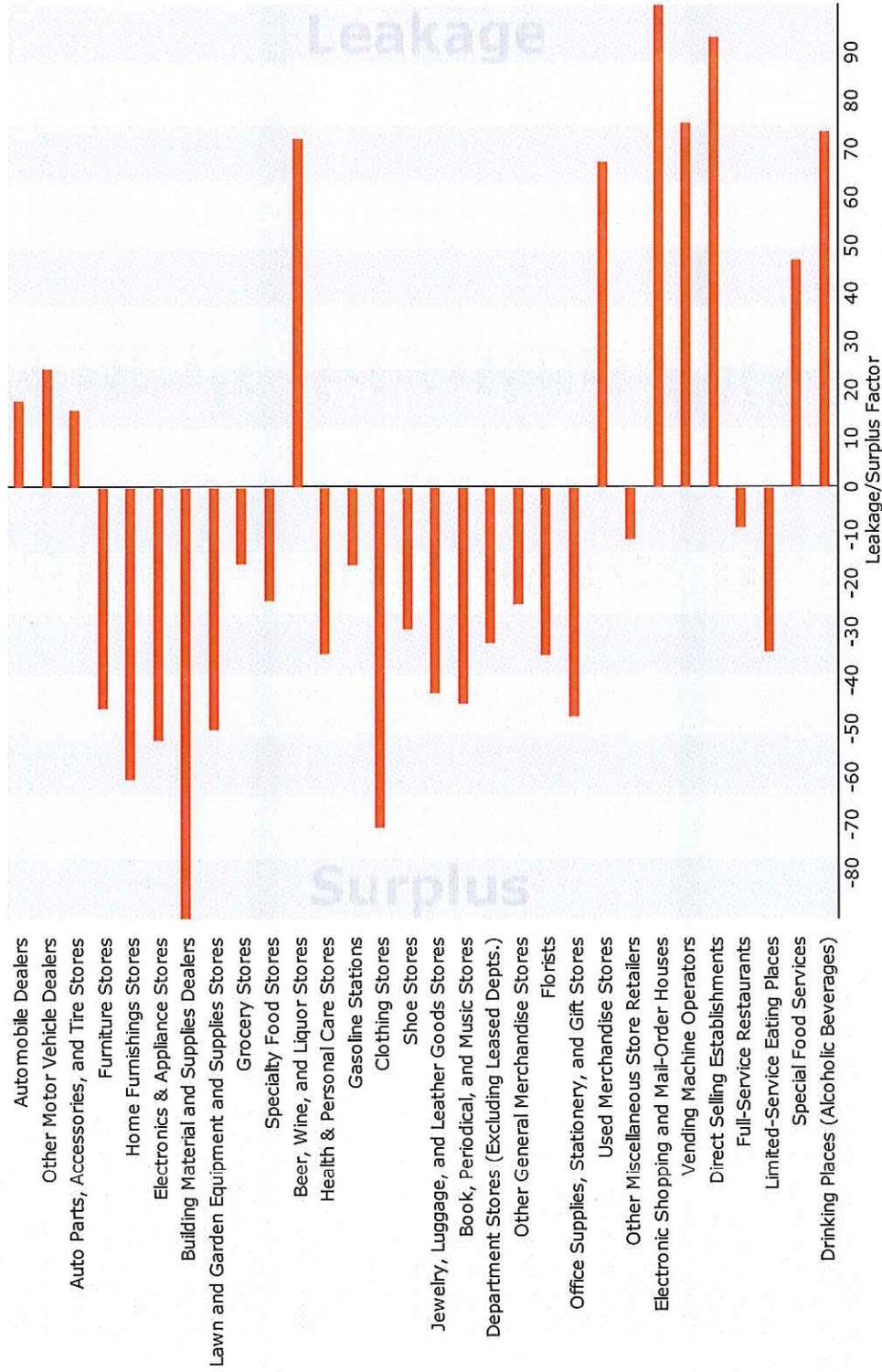
**Source:** Esri and Infogroup



## Leakage/Surplus Factor by Industry Subsector



## Leakage/Surplus Factor by Industry Group



## Appendix B – Esri Market Profile (5, 10 and 15-minute Drive)

|                               | 0 - 5 minutes | 0 - 10 minutes | 0 - 15 minutes |
|-------------------------------|---------------|----------------|----------------|
| <b>Population Summary</b>     |               |                |                |
| 2000 Total Population         | 1,833         | 13,680         | 75,102         |
| 2000 Group Quarters           | 9             | 242            | 1,880          |
| 2010 Total Population         | 1,846         | 14,638         | 83,680         |
| 2015 Total Population         | 1,863         | 14,860         | 85,528         |
| 2010-2015 Annual Rate         | 0.18%         | 0.33%          | 0.44%          |
| <b>Household Summary</b>      |               |                |                |
| 2000 Households               | 733           | 4,855          | 28,206         |
| 2000 Average Household Size   | 2.49          | 2.77           | 2.60           |
| 2010 Households               | 740           | 5,271          | 31,781         |
| 2010 Average Household Size   | 2.48          | 2.72           | 2.57           |
| 2015 Households               | 752           | 5,391          | 32,590         |
| 2015 Average Household Size   | 2.47          | 2.71           | 2.56           |
| 2010-2015 Annual Rate         | 0.32%         | 0.45%          | 0.50%          |
| 2000 Families                 | 579           | 3,930          | 21,080         |
| 2000 Average Family Size      | 2.83          | 3.11           | 3.05           |
| 2010 Families                 | 577           | 4,209          | 23,411         |
| 2010 Average Family Size      | 2.83          | 3.07           | 3.03           |
| 2015 Families                 | 581           | 4,282          | 23,878         |
| 2015 Average Family Size      | 2.82          | 3.06           | 3.02           |
| 2010-2015 Annual Rate         | 0.14%         | 0.34%          | 0.40%          |
| <b>Housing Unit Summary</b>   |               |                |                |
| 2000 Housing Units            | 770           | 5,071          | 29,552         |
| Owner Occupied Housing Units  | 85.0%         | 88.3%          | 78.9%          |
| Renter Occupied Housing Units | 9.7%          | 7.5%           | 16.5%          |
| Vacant Housing Units          | 5.3%          | 4.1%           | 4.6%           |
| 2010 Housing Units            | 799           | 5,613          | 34,032         |
| Owner Occupied Housing Units  | 81.2%         | 84.5%          | 75.6%          |
| Renter Occupied Housing Units | 11.4%         | 9.4%           | 17.8%          |
| Vacant Housing Units          | 7.4%          | 6.1%           | 6.6%           |
| 2015 Housing Units            | 822           | 5,808          | 35,356         |
| Owner Occupied Housing Units  | 80.1%         | 83.4%          | 74.7%          |
| Renter Occupied Housing Units | 11.3%         | 9.4%           | 17.5%          |



| Vacant Housing Units           | 8.5%      | 7.2%      | 7.8%      |
|--------------------------------|-----------|-----------|-----------|
| <b>Median Household Income</b> |           |           |           |
| 2000                           | \$67,866  | \$76,455  | \$66,149  |
| 2010                           | \$80,022  | \$87,655  | \$79,048  |
| 2015                           | \$92,224  | \$103,228 | \$90,713  |
| <b>Median Home Value</b>       |           |           |           |
| 2000                           | \$181,731 | \$230,213 | \$187,625 |
| 2010                           | \$190,485 | \$238,040 | \$197,893 |
| 2015                           | \$193,506 | \$240,792 | \$203,942 |
| <b>Per Capita Income</b>       |           |           |           |
| 2000                           | \$35,470  | \$41,482  | \$34,653  |
| 2010                           | \$41,665  | \$45,409  | \$39,394  |
| 2015                           | \$47,124  | \$50,733  | \$44,237  |
| <b>Median Age</b>              |           |           |           |
| 2000                           | 42.9      | 43.4      | 41.3      |
| 2010                           | 48.0      | 48.5      | 44.9      |
| 2015                           | 50.0      | 49.9      | 45.4      |

**Data Note:** Household population includes persons not residing in group quarters. Average Household Size is the household population divided by total households. Persons in families include the householder and persons related to the householder by birth, marriage, or adoption. Per Capita Income represents the income received by all persons aged 15 years and over divided by the total population. Detail may not sum to totals due to rounding.

**Source:** U.S. Bureau of the Census, 2000 Census of Population and Housing, Esri forecasts for 2010 and 2015.

| 2000 Households by Income | 0 - 15 minutes |                |                |
|---------------------------|----------------|----------------|----------------|
|                           | 0 - 5 minutes  | 0 - 10 minutes | 0 - 15 minutes |
| Household Income Base     | 743            | 4,854          | 28,203         |
| <\$15,000                 | 5.9%           | 4.3%           | 6.0%           |
| \$15,000 - \$24,999       | 7.5%           | 6.3%           | 6.9%           |
| \$25,000 - \$34,999       | 10.5%          | 8.6%           | 9.6%           |
| \$35,000 - \$49,999       | 12.1%          | 9.5%           | 12.4%          |
| \$50,000 - \$74,999       | 18.8%          | 20.0%          | 21.7%          |
| \$75,000 - \$99,999       | 16.8%          | 16.1%          | 16.0%          |
| \$100,000 - \$149,999     | 14.3%          | 15.7%          | 14.6%          |
| \$150,000 - \$199,999     | 6.1%           | 7.6%           | 5.2%           |
| \$200,000+                | 7.9%           | 11.9%          | 7.5%           |



Average Household Income \$92,984 \$113,406 \$91,072

**2010 Households by Income**

| Household Income Base    | 740       | 5,271     | 31,781    |
|--------------------------|-----------|-----------|-----------|
| <\$15,000                | 4.1%      | 2.9%      | 4.1%      |
| \$15,000 - \$24,999      | 4.7%      | 4.3%      | 4.9%      |
| \$25,000 - \$34,999      | 6.5%      | 5.4%      | 6.3%      |
| \$35,000 - \$49,999      | 13.1%     | 10.0%     | 12.3%     |
| \$50,000 - \$74,999      | 17.6%     | 16.8%     | 18.2%     |
| \$75,000 - \$99,999      | 15.8%     | 18.2%     | 19.3%     |
| \$100,000 - \$149,999    | 20.4%     | 20.9%     | 19.8%     |
| \$150,000 - \$199,999    | 7.0%      | 8.0%      | 6.3%      |
| \$200,000+               | 10.8%     | 13.5%     | 8.8%      |
| Average Household Income | \$108,908 | \$122,202 | \$102,641 |

**2015 Households by Income**

| Household Income Base    | 751       | 5,391     | 32,589    |
|--------------------------|-----------|-----------|-----------|
| <\$15,000                | 2.9%      | 2.2%      | 3.2%      |
| \$15,000 - \$24,999      | 3.2%      | 2.9%      | 3.5%      |
| \$25,000 - \$34,999      | 4.3%      | 3.4%      | 4.1%      |
| \$35,000 - \$49,999      | 8.8%      | 6.6%      | 8.3%      |
| \$50,000 - \$74,999      | 20.1%     | 16.7%     | 18.9%     |
| \$75,000 - \$99,999      | 14.4%     | 15.6%     | 17.1%     |
| \$100,000 - \$149,999    | 24.6%     | 27.6%     | 27.0%     |
| \$150,000 - \$199,999    | 8.8%      | 9.5%      | 7.6%      |
| \$200,000+               | 12.9%     | 15.5%     | 10.3%     |
| Average Household Income | \$122,474 | \$135,684 | \$114,884 |

**2000 Owner Occupied Housing Units by Value**

| Total                 | 654       | 4,471     | 23,311    |
|-----------------------|-----------|-----------|-----------|
| <\$50,000             | 0.0%      | 0.1%      | 1.0%      |
| \$50,000 - \$99,999   | 4.0%      | 4.2%      | 6.1%      |
| \$100,000 - \$149,999 | 29.2%     | 16.8%     | 22.6%     |
| \$150,000 - \$199,999 | 22.6%     | 19.1%     | 25.9%     |
| \$200,000 - \$299,999 | 24.9%     | 28.6%     | 25.9%     |
| \$300,000 - \$499,999 | 12.7%     | 19.1%     | 13.7%     |
| \$500,000 - \$999,999 | 5.8%      | 10.6%     | 4.3%      |
| \$1,000,000 +         | 0.8%      | 1.6%      | 0.7%      |
| Average Home Value    | \$239,410 | \$296,111 | \$232,677 |

**2000 Specified Renter Occupied Housing Units by Contract Rent**

| Total | 66 | 342 | 4,744 |
|-------|----|-----|-------|
|-------|----|-----|-------|



|                |       |       |       |
|----------------|-------|-------|-------|
| With Cash Rent | 90.9% | 88.6% | 94.7% |
| No Cash Rent   | 9.1%  | 11.4% | 5.3%  |
| Median Rent    | \$613 | \$768 | \$669 |
| Average Rent   | \$584 | \$783 | \$738 |

**Data Note:** Income represents the preceding year, expressed in current dollars. Household income includes wage and salary earnings, interest dividends, net rents, pensions, SSI and welfare payments, child support, and alimony. Specified Renter Occupied Housing Units exclude houses on 10+ acres. Average Rent excludes units paying no cash.

**Source:** U.S. Bureau of the Census, 2000 Census of Population and Housing. Esri forecasts for 2010 and 2015.

|                               | 0 - 5 minutes |        |        | 0 - 10 minutes |  |  | 0 - 15 minutes |  |  |
|-------------------------------|---------------|--------|--------|----------------|--|--|----------------|--|--|
| <b>2000 Population by Age</b> |               |        |        |                |  |  |                |  |  |
| Total                         | 1,834         | 13,679 | 75,102 |                |  |  |                |  |  |
| 0 - 4                         | 5.2%          | 5.0%   | 5.7%   |                |  |  |                |  |  |
| 5 - 9                         | 7.4%          | 6.8%   | 7.0%   |                |  |  |                |  |  |
| 10 - 14                       | 7.3%          | 7.9%   | 7.4%   |                |  |  |                |  |  |
| 15 - 24                       | 9.3%          | 10.3%  | 9.8%   |                |  |  |                |  |  |
| 25 - 34                       | 7.3%          | 6.6%   | 9.7%   |                |  |  |                |  |  |
| 35 - 44                       | 17.4%         | 16.5%  | 17.2%  |                |  |  |                |  |  |
| 45 - 54                       | 18.1%         | 19.3%  | 17.1%  |                |  |  |                |  |  |
| 55 - 64                       | 12.7%         | 12.9%  | 10.7%  |                |  |  |                |  |  |
| 65 - 74                       | 9.1%          | 8.0%   | 7.7%   |                |  |  |                |  |  |
| 75 - 84                       | 4.7%          | 4.8%   | 5.5%   |                |  |  |                |  |  |
| 85 +                          | 1.5%          | 1.9%   | 2.1%   |                |  |  |                |  |  |
| 18 +                          | 76.0%         | 75.5%  | 75.4%  |                |  |  |                |  |  |
| <b>2010 Population by Age</b> |               |        |        |                |  |  |                |  |  |
| Total                         | 1,849         | 14,636 | 83,679 |                |  |  |                |  |  |
| 0 - 4                         | 4.5%          | 4.4%   | 5.4%   |                |  |  |                |  |  |
| 5 - 9                         | 5.5%          | 5.3%   | 6.0%   |                |  |  |                |  |  |
| 10 - 14                       | 6.5%          | 6.6%   | 6.7%   |                |  |  |                |  |  |
| 15 - 24                       | 10.7%         | 10.4%  | 10.5%  |                |  |  |                |  |  |
| 25 - 34                       | 7.0%          | 7.2%   | 8.9%   |                |  |  |                |  |  |
| 35 - 44                       | 10.4%         | 10.2%  | 12.6%  |                |  |  |                |  |  |
| 45 - 54                       | 18.7%         | 18.2%  | 17.5%  |                |  |  |                |  |  |
| 55 - 64                       | 17.0%         | 18.0%  | 15.0%  |                |  |  |                |  |  |
| 65 - 74                       | 10.8%         | 10.7%  | 8.7%   |                |  |  |                |  |  |
| 75 - 84                       | 6.5%          | 6.2%   | 5.7%   |                |  |  |                |  |  |
| 85 +                          | 2.3%          | 2.8%   | 2.9%   |                |  |  |                |  |  |
| 18 +                          | 79.0%         | 79.4%  | 77.7%  |                |  |  |                |  |  |



| 2015 Population by Age |       |        |        |
|------------------------|-------|--------|--------|
| Total                  | 1,865 | 14,882 | 85,527 |
| 0 - 4                  | 4.2%  | 4.2%   | 5.3%   |
| 5 - 9                  | 5.1%  | 5.2%   | 5.9%   |
| 10 - 14                | 6.3%  | 6.3%   | 6.6%   |
| 15 - 24                | 10.4% | 10.0%  | 10.3%  |
| 25 - 34                | 7.5%  | 7.7%   | 9.5%   |
| 35 - 44                | 9.7%  | 10.1%  | 11.7%  |
| 45 - 54                | 15.9% | 15.2%  | 15.5%  |
| 55 - 64                | 18.4% | 18.3%  | 15.8%  |
| 65 - 74                | 13.2% | 13.3%  | 10.6%  |
| 75 - 84                | 6.5%  | 6.5%   | 5.7%   |
| 85 +                   | 2.7%  | 3.1%   | 3.0%   |
| 18 +                   | 80.2% | 80.2%  | 78.2%  |

| 2000 Population by Sex |       |       |       |
|------------------------|-------|-------|-------|
| Males                  | 49.5% | 49.4% | 48.9% |
| Females                | 50.5% | 50.6% | 51.1% |

| 2010 Population by Sex |       |       |       |
|------------------------|-------|-------|-------|
| Males                  | 49.2% | 48.9% | 48.9% |
| Females                | 50.8% | 51.1% | 51.1% |

| 2015 Population by Sex |       |       |       |
|------------------------|-------|-------|-------|
| Males                  | 49.1% | 48.8% | 48.9% |
| Females                | 50.9% | 51.2% | 51.1% |

Source: U.S. Bureau of the Census, 2000 Census of Population and Housing, Esri forecasts for 2010 and 2015.

|  | 0 - 5 minutes |        | 0 - 10 minutes |  | 0 - 15 minutes |  |
|--|---------------|--------|----------------|--|----------------|--|
|  |               |        |                |  |                |  |
| <b>2000 Population by Race/Ethnicity</b> |               |        |                |  |                |  |
| Total                                    | 1,832         | 13,680 | 75,103         |  |                |  |
| White Alone                              | 97.7%         | 97.4%  | 93.3%          |  |                |  |
| Black Alone                              | 0.5%          | 0.6%   | 3.5%           |  |                |  |
| American Indian Alone                    | 0.2%          | 0.1%   | 0.1%           |  |                |  |
| Asian or Pacific Islander Alone          | 0.9%          | 1.1%   | 2.0%           |  |                |  |
| Some Other Race Alone                    | 0.2%          | 0.1%   | 0.2%           |  |                |  |
| Two or More Races                        | 0.6%          | 0.7%   | 0.8%           |  |                |  |
| Hispanic Origin                          | 0.4%          | 0.5%   | 0.9%           |  |                |  |
| Diversity Index                          | 5.3           | 6.1    | 14.4           |  |                |  |



| 2010 Population by Race/Ethnicity |       |        |        |
|-----------------------------------|-------|--------|--------|
| Total                             | 1,845 | 14,638 | 83,680 |
| White Alone                       | 96.9% | 96.3%  | 91.2%  |
| Black Alone                       | 0.6%  | 0.8%   | 4.1%   |
| American Indian Alone             | 0.2%  | 0.1%   | 0.1%   |
| Asian or Pacific Islander Alone   | 1.2%  | 1.5%   | 3.0%   |
| Some Other Race Alone             | 0.3%  | 0.2%   | 0.4%   |
| Two or More Races                 | 0.9%  | 1.0%   | 1.2%   |
| Hispanic Origin                   | 0.7%  | 0.9%   | 1.5%   |
| Diversity Index                   | 7.6   | 8.8    | 19.0   |

| 2015 Population by Race/Ethnicity |       |        |        |
|-----------------------------------|-------|--------|--------|
| Total                             | 1,863 | 14,880 | 85,530 |
| White Alone                       | 96.1% | 95.7%  | 90.3%  |
| Black Alone                       | 0.7%  | 0.9%   | 4.3%   |
| American Indian Alone             | 0.2%  | 0.2%   | 0.1%   |
| Asian or Pacific Islander Alone   | 1.5%  | 1.8%   | 3.5%   |
| Some Other Race Alone             | 0.4%  | 0.3%   | 0.4%   |
| Two or More Races                 | 1.1%  | 1.1%   | 1.3%   |
| Hispanic Origin                   | 0.9%  | 1.1%   | 1.9%   |
| Diversity Index                   | 9.1   | 10.3   | 21.2   |

| 2000 Population 3+ by School Enrollment |       |        |        |
|---|-------|--------|--------|
| Total                                   | 1,749 | 13,241 | 72,477 |
| Enrolled in Nursery/Preschool           | 1.5%  | 1.7%   | 2.3%   |
| Enrolled in Kindergarten                | 1.5%  | 1.2%   | 1.5%   |
| Enrolled in Grade 1-8                   | 13.3% | 12.8%  | 12.0%  |
| Enrolled in Grade 9-12                  | 4.6%  | 6.3%   | 6.2%   |
| Enrolled in College                     | 3.5%  | 3.7%   | 3.3%   |
| Enrolled in Grad/Prof School            | 1.3%  | 1.2%   | 1.4%   |
| Not Enrolled in School                  | 74.3% | 73.0%  | 73.5%  |

| 2010 Population 25+ by Educational Attainment |       |        |        |
|---|-------|--------|--------|
| Total   | 1,346 | 10,735 | 59,750 |
| Less Than 9th Grade                           | 0.4%  | 0.6%   | 1.2%   |
| 9th to 12th Grade, No Diploma                 | 5.3%  | 3.4%   | 3.8%   |
| High School Graduate                          | 25.9% | 23.4%  | 22.8%  |
| Some College, No Degree                       | 21.6% | 19.6%  | 18.7%  |
| Associate Degree                              | 6.7%  | 6.7%   | 7.6%   |
| Bachelor's Degree                             | 25.9% | 26.9%  | 26.9%  |
| Graduate/Professional Degree                  | 14.3% | 19.3%  | 18.9%  |



**Data Note:** Persons of Hispanic Origin may be of any race. The Diversity Index measures the probability that two people from the same area will be from different race/ethnic groups.  
**Source:** U.S. Bureau of the Census, 2000 Census of Population and Housing, Esri forecasts for 2010 and 2015.

|  | 0 - 5 minutes |        | 0 - 10 minutes |  | 0 - 15 minutes |  |
|--|---------------|--------|----------------|--|----------------|--|
| <b>2010 Population 15+ by Marital Status</b>                     |               |        |                |  |                |  |
| Total  | 1,543         | 12,252 | 68,557         |  |                |  |
| Never Married  | 20.7%         | 22.7%  | 23.2%          |  |                |  |
| Married  | 62.2%         | 63.4%  | 61.8%          |  |                |  |
| Widowed  | 7.5%          | 6.0%   | 6.5%           |  |                |  |
| Divorced   | 9.6%          | 8.0%   | 8.5%           |  |                |  |
| <b>2000 Population 16+ by Employment Status</b>                  |               |        |                |  |                |  |
| Total  | 1,402         | 10,717 | 58,789         |  |                |  |
| In Labor Force   | 67.0%         | 64.5%  | 65.6%          |  |                |  |
| Civilian Employed  | 63.7%         | 62.4%  | 63.5%          |  |                |  |
| Civilian Unemployed  | 3.3%          | 2.2%   | 2.1%           |  |                |  |
| In Armed Forces  | 0.0%          | 0.0%   | 0.1%           |  |                |  |
| Not In Labor Force   | 33.0%         | 35.5%  | 34.4%          |  |                |  |
| <b>2010 Civilian Population 16+ in Labor Force</b>               |               |        |                |  |                |  |
| Civilian Employed  | 88.1%         | 90.1%  | 91.2%          |  |                |  |
| Civilian Unemployed  | 11.9%         | 9.9%   | 8.8%           |  |                |  |
| <b>2015 Civilian Population 16+ in Labor Force</b>               |               |        |                |  |                |  |
| Civilian Employed  | 90.2%         | 91.9%  | 92.8%          |  |                |  |
| Civilian Unemployed  | 9.8%          | 8.1%   | 7.2%           |  |                |  |
| <b>2000 Females 16+ by Employment Status and Age of Children</b> |               |        |                |  |                |  |
| Total  | 724           | 5,457  | 30,312         |  |                |  |
| Own Children < 6 Only  | 5.5%          | 4.8%   | 6.7%           |  |                |  |
| Employed/in Armed Forces   | 4.3%          | 2.8%   | 4.4%           |  |                |  |
| Unemployed   | 0.0%          | 0.0%   | 0.1%           |  |                |  |
| Not in Labor Force   | 1.2%          | 2.0%   | 2.2%           |  |                |  |
| Own Children <6 and 6-17 Only                                    | 4.6%          | 5.0%   | 5.9%           |  |                |  |
| Employed/in Armed Forces   | 2.3%          | 2.4%   | 3.2%           |  |                |  |
| Unemployed   | 0.0%          | 0.0%   | 0.0%           |  |                |  |
| Not in Labor Force   | 2.2%          | 2.6%   | 2.7%           |  |                |  |
| Own Children 6-17 Only   | 21.0%         | 20.0%  | 18.2%          |  |                |  |
| Employed/in Armed Forces   | 14.2%         | 13.5%  | 13.1%          |  |                |  |
| Unemployed   | 0.6%          | 0.6%   | 0.3%           |  |                |  |



|   | 6.2%  | 70.1% | 35.0% | 1.0% | 29.0% | 6.0%  | 4.9%   |
|---|-------|-------|-------|------|-------|-------|--------|
| Not in Labor Force                              |       |       |       |      |       |       |        |
| No Own Children < 18                            | 68.9% | 70.1% | 35.0% | 1.0% | 29.0% | 6.0%  | 4.9%   |
| Employed/in Armed Forces                        | 38.7% |       |       |      |       |       | 69.1%  |
| Unemployed                                      | 1.2%  |       |       |      |       |       | 34.7%  |
| Not in Labor Force                              | 29.0% |       |       |      |       | 34.2% | 1.4%   |
|   |       |       |       |      |       |       | 33.0%  |
| <b>2010 Employed Population 16+ by Industry</b> |       |       |       |      |       |       |        |
| Total   | 886   | 6,946 |       |      |       |       | 39,943 |
| Agriculture/Mining                              | 0.7%  | 1.0%  |       |      |       |       | 0.5%   |
| Construction                                    | 5.6%  | 5.7%  |       |      |       |       | 4.8%   |
| Manufacturing                                   | 13.0% | 11.5% |       |      |       |       | 12.1%  |
| Wholesale Trade                                 | 5.1%  | 5.1%  |       |      |       |       | 4.5%   |
| Retail Trade                                    | 9.4%  | 8.9%  |       |      |       |       | 10.2%  |
| Transportation/Utilities                        | 4.6%  | 3.9%  |       |      |       |       | 4.2%   |
| Information                                     | 1.5%  | 1.6%  |       |      |       |       | 1.9%   |
| Finance/Insurance/Real Estate                   | 7.7%  | 7.6%  |       |      |       |       | 8.4%   |
| Services  | 49.0% | 51.4% |       |      |       |       | 50.0%  |
| Public Administration                           | 3.5%  | 3.2%  |       |      |       |       | 3.5%   |

Source: U.S. Bureau of the Census, 2000 Census of Population and Housing, Esri forecasts for 2010 and 2015.

|   | 0 - 5 minutes | 0 - 10 minutes | 0 - 15 minutes |
|---|---------------|----------------|----------------|
| <b>2010 Employed Population 16+ by Occupation</b> |               |                |                |
| Total   | 885           | 6,949          | 39,945         |
| White Collar                                      | 71.6%         | 74.1%          | 75.4%          |
| Management/Business/Financial                     | 22.0%         | 21.2%          | 20.2%          |
| Professional                                      | 24.9%         | 30.2%          | 30.7%          |
| Sales   | 11.0%         | 12.2%          | 12.7%          |
| Administrative Support                            | 13.8%         | 10.5%          | 11.8%          |
| Services  | 12.1%         | 11.8%          | 11.2%          |
| Blue Collar                                       | 16.3%         | 14.2%          | 13.4%          |
| Farming/Forestry/Fishing                          | 0.3%          | 0.3%           | 0.2%           |
| Construction/Extraction                           | 5.0%          | 3.9%           | 3.3%           |
| Installation/Maintenance/Repair                   | 2.3%          | 2.5%           | 2.5%           |
| Production  | 2.5%          | 3.2%           | 3.7%           |
| Transportation/Material Moving                    | 6.2%          | 4.1%           | 3.8%           |



**2000 Workers 16+ by Means of Transportation to Work**

|                                  |       |       |        |
|----------------------------------|-------|-------|--------|
| Total                            | 887   | 6,612 | 36,783 |
| Drove Alone - Car, Truck, or Van | 88.5% | 87.8% | 88.5%  |
| Carpooled - Car, Truck, or Van   | 4.3%  | 4.4%  | 4.9%   |
| Public Transportation            | 0.5%  | 0.3%  | 0.6%   |
| Walked                           | 1.7%  | 1.1%  | 0.8%   |
| Other Means                      | 0.7%  | 0.6%  | 0.7%   |
| Worked at Home                   | 4.4%  | 5.8%  | 4.4%   |

**2000 Workers 16+ by Travel Time to Work**

|                                      |       |       |        |
|--------------------------------------|-------|-------|--------|
| Total                                | 888   | 6,612 | 36,782 |
| Did not Work at Home                 | 95.6% | 94.2% | 95.6%  |
| Less than 5 minutes                  | 2.8%  | 2.7%  | 2.2%   |
| 5 to 9 minutes                       | 10.1% | 8.6%  | 8.9%   |
| 10 to 19 minutes                     | 23.1% | 23.3% | 26.2%  |
| 20 to 24 minutes                     | 9.1%  | 16.9% | 16.9%  |
| 25 to 34 minutes                     | 29.1% | 23.8% | 22.3%  |
| 35 to 44 minutes                     | 9.7%  | 9.1%  | 8.6%   |
| 45 to 59 minutes                     | 9.6%  | 7.6%  | 7.3%   |
| 60 to 89 minutes                     | 1.5%  | 1.3%  | 1.9%   |
| 90 or more minutes                   | 0.7%  | 0.9%  | 1.4%   |
| Worked at Home                       | 4.4%  | 5.8%  | 4.4%   |
| Average Travel Time to Work (in min) | 25.4  | 24.5  | 24.5   |

**2000 Households by Vehicles Available**

|                                      |       |       |        |
|--------------------------------------|-------|-------|--------|
| Total                                | 731   | 4,847 | 28,179 |
| None                                 | 1.4%  | 2.3%  | 3.9%   |
| 1                                    | 18.7% | 16.0% | 23.5%  |
| 2                                    | 51.4% | 48.4% | 48.3%  |
| 3                                    | 17.7% | 21.2% | 17.0%  |
| 4                                    | 8.6%  | 8.2%  | 5.2%   |
| 5+                                   | 2.1%  | 3.9%  | 2.2%   |
| Average Number of Vehicles Available | 2.2   | 2.3   | 2.0    |

Source: U.S. Bureau of the Census, 2000 Census of Population and Housing. Esri forecasts for 2010 and 2015.

| 2000 Households by Type | 0 - 5 minutes |   | 0 - 10 minutes |   | 0 - 15 minutes |   |
|-------------------------|---------------|---|----------------|---|----------------|---|
|                         | Total         | % | Total          | % | Total          | % |
| Total                   | 733           |   | 4,856          |   | 28,206         |   |
| Family Households       | 79.0%         |   | 80.9%          |   | 74.7%          |   |
| Married-couple Family   | 69.4%         |   | 72.9%          |   | 65.8%          |   |



|                                  |       |       |       |
|----------------------------------|-------|-------|-------|
| With Related Children            | 28.6% | 30.6% | 29.4% |
| Other Family (No Spouse)         | 9.6%  | 8.1%  | 8.9%  |
| With Related Children            | 5.9%  | 4.4%  | 4.9%  |
| Nonfamily Households             | 21.0% | 19.0% | 25.3% |
| Householder Living Alone         | 17.6% | 15.9% | 21.5% |
| Householder Not Living Alone     | 3.4%  | 3.2%  | 3.8%  |
| Households with Related Children | 34.5% | 35.0% | 34.3% |
| Households with Persons 65+      | 27.1% | 25.0% | 25.1% |

|                                |       |       |        |
|--------------------------------|-------|-------|--------|
| <b>2000 Households by Size</b> |       |       |        |
| Total                          | 733   | 4,855 | 28,206 |
| 1 Person Household             | 17.6% | 15.9% | 21.5%  |
| 2 Person Household             | 38.2% | 39.5% | 36.6%  |
| 3 Person Household             | 18.3% | 16.8% | 16.3%  |
| 4 Person Household             | 17.3% | 17.3% | 16.1%  |
| 5 Person Household             | 6.7%  | 7.4%  | 6.8%   |
| 6 Person Household             | 1.4%  | 2.3%  | 2.1%   |
| 7 + Person Household           | 0.5%  | 0.7%  | 0.7%   |

|   |       |       |        |
|---|-------|-------|--------|
| <b>2000 Households by Year Householder Moved In</b> |       |       |        |
| Total   | 729   | 4,846 | 28,179 |
| Moved in 1999 to March 2000                         | 10.4% | 9.2%  | 15.2%  |
| Moved in 1995 to 1998                               | 14.3% | 19.2% | 25.5%  |
| Moved in 1990 to 1994                               | 18.1% | 19.3% | 17.0%  |
| Moved in 1980 to 1989                               | 22.9% | 21.4% | 19.3%  |
| Moved in 1970 to 1979                               | 15.5% | 15.8% | 11.8%  |
| Moved in 1969 or Earlier                            | 18.8% | 15.1% | 11.2%  |
| Median Year Householder Moved In                    | 1,987 | 1,989 | 1,992  |

|   |       |       |        |
|---|-------|-------|--------|
| <b>2000 Housing Units by Units in Structure</b> |       |       |        |
| Total   | 764   | 5,065 | 29,535 |
| 1, Detached                                     | 93.5% | 93.4% | 77.8%  |
| 1, Attached                                     | 1.4%  | 3.1%  | 6.3%   |
| 2   | 3.7%  | 1.5%  | 1.6%   |
| 3 or 4  | 0.0%  | 0.3%  | 2.5%   |
| 5 to 9  | 0.4%  | 0.2%  | 3.9%   |
| 10 to 19  | 0.9%  | 0.3%  | 3.0%   |
| 20 +  | 0.1%  | 1.0%  | 4.3%   |
| Mobile Home                                     | 0.0%  | 0.1%  | 0.5%   |
| Other   | 0.0%  | 0.0%  | 0.0%   |



### 2000 Housing Units by Year Structure Built

|                             |       |       |        |
|-----------------------------|-------|-------|--------|
| Total                       | 763   | 5,065 | 29,534 |
| 1999 to March 2000          | 3.9%  | 2.7%  | 3.4%   |
| 1995 to 1998                | 6.3%  | 7.1%  | 10.4%  |
| 1990 to 1994                | 4.8%  | 9.5%  | 10.1%  |
| 1980 to 1989                | 7.1%  | 12.9% | 14.9%  |
| 1970 to 1979                | 12.8% | 15.3% | 16.3%  |
| 1969 or Earlier             | 65.0% | 52.6% | 44.9%  |
| Median Year Structure Built | 1,963 | 1,968 | 1,973  |

Source: U.S. Bureau of the Census, 2000 Census of Population and Housing. Esri forecasts for 2010 and 2015.

### Top 3 Tapestry Segments

|    | 0 - 5 minutes            |                          | 0 - 10 minutes           |                          | 0 - 15 minutes           |                          |
|----|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| 1. | Exurbanites              | Exurbanites              | Exurbanites              | Exurbanites              | Exurbanites              | Exurbanites              |
| 2. | Prosperous Empty Nesters |
| 3. | Connoisseurs             | Connoisseurs             | Connoisseurs             | Connoisseurs             | Connoisseurs             | In Style                 |

### 2010 Consumer Spending

|                                    |             |              |               |
|------------------------------------|-------------|--------------|---------------|
| Apparel & Services: Total \$       | \$1,873,011 | \$15,002,566 | \$77,256,284  |
| Average Spent                      | \$2,530.45  | \$2,846.42   | \$2,430.93    |
| Spending Potential Index           | 106         | 119          | 102           |
| Computers & Accessories: Total \$  | \$245,281   | \$1,990,457  | \$10,208,014  |
| Average Spent                      | \$331.38    | \$377.65     | \$321.20      |
| Spending Potential Index           | 151         | 172          | 146           |
| Education: Total \$                | \$1,470,409 | \$11,863,637 | \$60,072,864  |
| Average Spent                      | \$1,986.53  | \$2,250.87   | \$1,890.24    |
| Spending Potential Index           | 163         | 185          | 155           |
| Entertainment/Recreation: Total \$ | \$3,835,210 | \$30,819,595 | \$154,905,081 |
| Average Spent                      | \$5,181.38  | \$5,847.36   | \$4,874.21    |
| Spending Potential Index           | 161         | 181          | 151           |
| Food at Home: Total \$             | \$4,868,661 | \$38,348,921 | \$198,681,046 |
| Average Spent                      | \$6,577.58  | \$7,275.89   | \$6,251.66    |
| Spending Potential Index           | 147         | 163          | 140           |
| Food Away from Home: Total \$      | \$3,586,234 | \$28,416,073 | \$147,454,594 |
| Average Spent                      | \$4,845.02  | \$5,391.35   | \$4,639.78    |
| Spending Potential Index           | 151         | 168          | 144           |
| Health Care: Total \$              | \$4,432,465 | \$34,096,674 | \$171,346,835 |



|   |              |               |                 |
|---|--------------|---------------|-----------------|
| Average Spent                           | \$5,988.28   | \$6,469.12    | \$5,391.57      |
| Spending Potential Index                | 161          | 174           | 145             |
| HH Furnishings & Equipment: Total \$    | \$2,142,163  | \$17,306,285  | \$86,584,128    |
| Average Spent                           | \$2,894.07   | \$3,283.50    | \$2,724.44      |
| Spending Potential Index                | 141          | 159           | 132             |
| Investments: Total \$                   | \$2,297,130  | \$18,991,049  | \$86,134,789    |
| Average Spent                           | \$3,103.43   | \$3,603.15    | \$2,710.30      |
| Spending Potential Index                | 178          | 207           | 156             |
| Retail Goods: Total \$                  | \$27,273,833 | \$216,826,848 | \$1,101,778,988 |
| Average Spent                           | \$36,847.05  | \$41,138.29   | \$34,668.36     |
| Spending Potential Index                | 148          | 165           | 139             |
| Shelter: Total \$                       | \$18,400,689 | \$149,052,562 | \$752,475,146   |
| Average Spent                           | \$24,859.40  | \$28,279.56   | \$23,677.23     |
| Spending Potential Index                | 157          | 179           | 150             |
| TV/Video/Audio: Total \$                | \$1,361,443  | \$10,726,804  | \$55,739,239    |
| Average Spent                           | \$1,839.31   | \$2,035.18    | \$1,753.88      |
| Spending Potential Index                | 148          | 164           | 141             |
| Travel: Total \$                        | \$2,425,017  | \$19,798,892  | \$95,765,418    |
| Average Spent                           | \$3,276.21   | \$3,756.42    | \$3,013.34      |
| Spending Potential Index                | 173          | 198           | 159             |
| Vehicle Maintenance & Repairs: Total \$ | \$1,084,883  | \$8,628,277   | \$43,727,041    |
| Average Spent                           | \$1,465.68   | \$1,637.03    | \$1,375.91      |
| Spending Potential Index                | 155          | 174           | 146             |

**Data Note:** Consumer spending shows the amount spent on a variety of goods and services by households that reside in the area. Expenditures are shown by broad budget categories that are not mutually exclusive. Consumer spending does not equal business revenue. Total and Average Amount Spent Per Household represent annual figures. The Spending Potential Index represents the amount spent in the area relative to a national average of 100.

**Source:** Consumer Spending data are derived from the 2006 and 2007 Consumer Expenditure Surveys, Bureau of Labor Statistics. Esri.

**Source:** U.S. Bureau of the Census, 2000 Census of Population and Housing. Esri forecasts for 2010 and 2015.