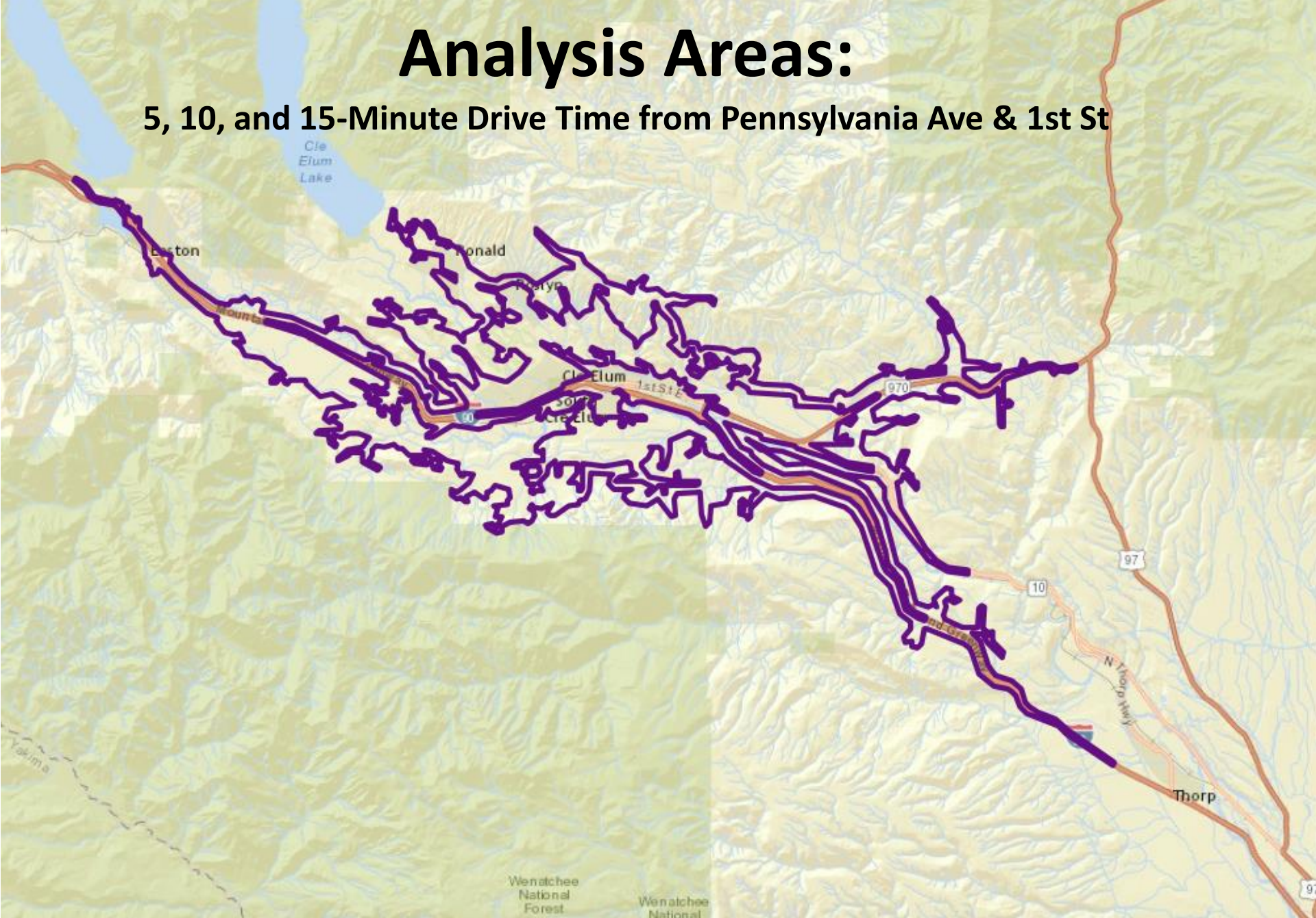




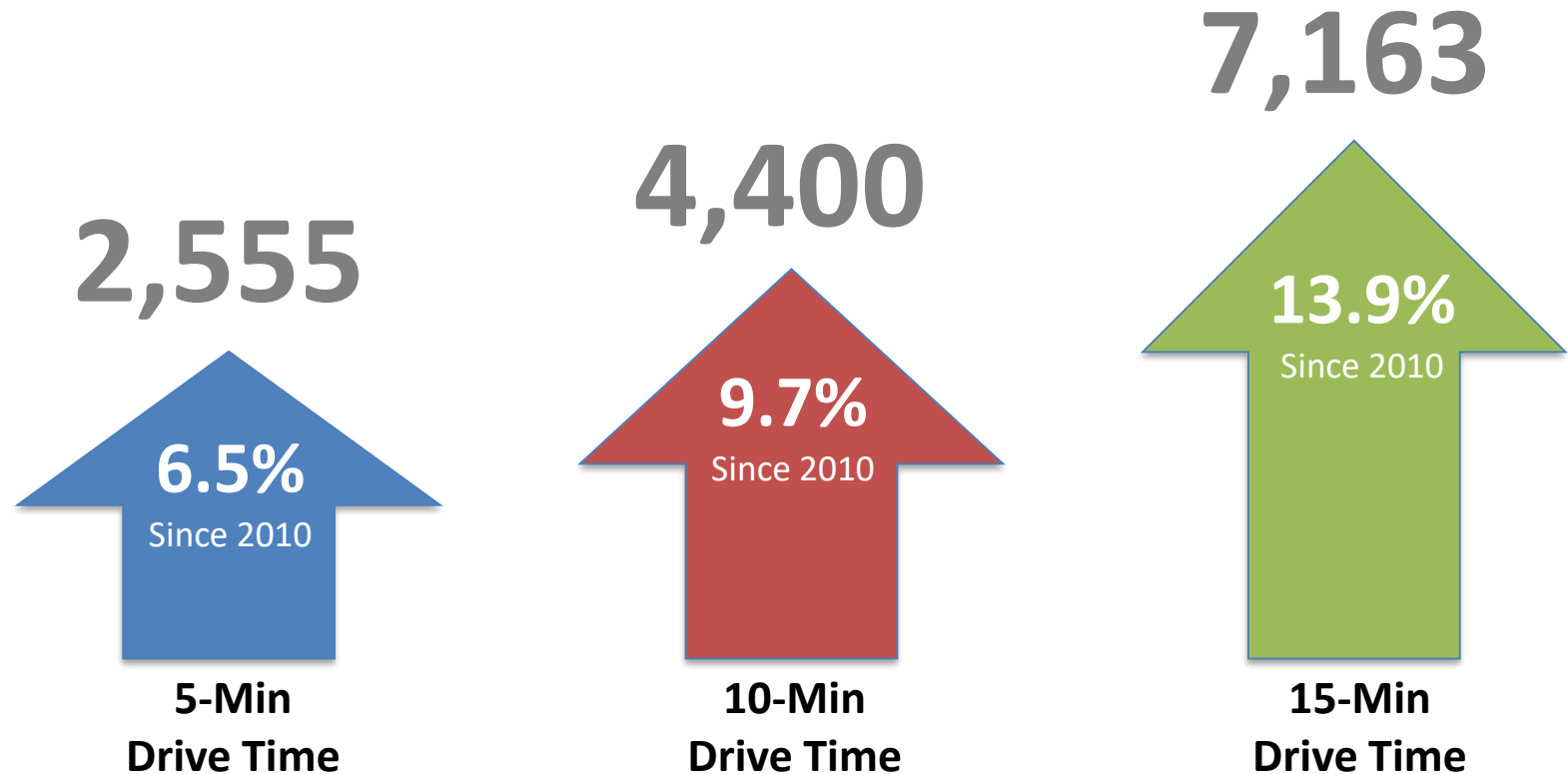


# Analysis Areas:

5, 10, and 15-Minute Drive Time from Pennsylvania Ave & 1st St

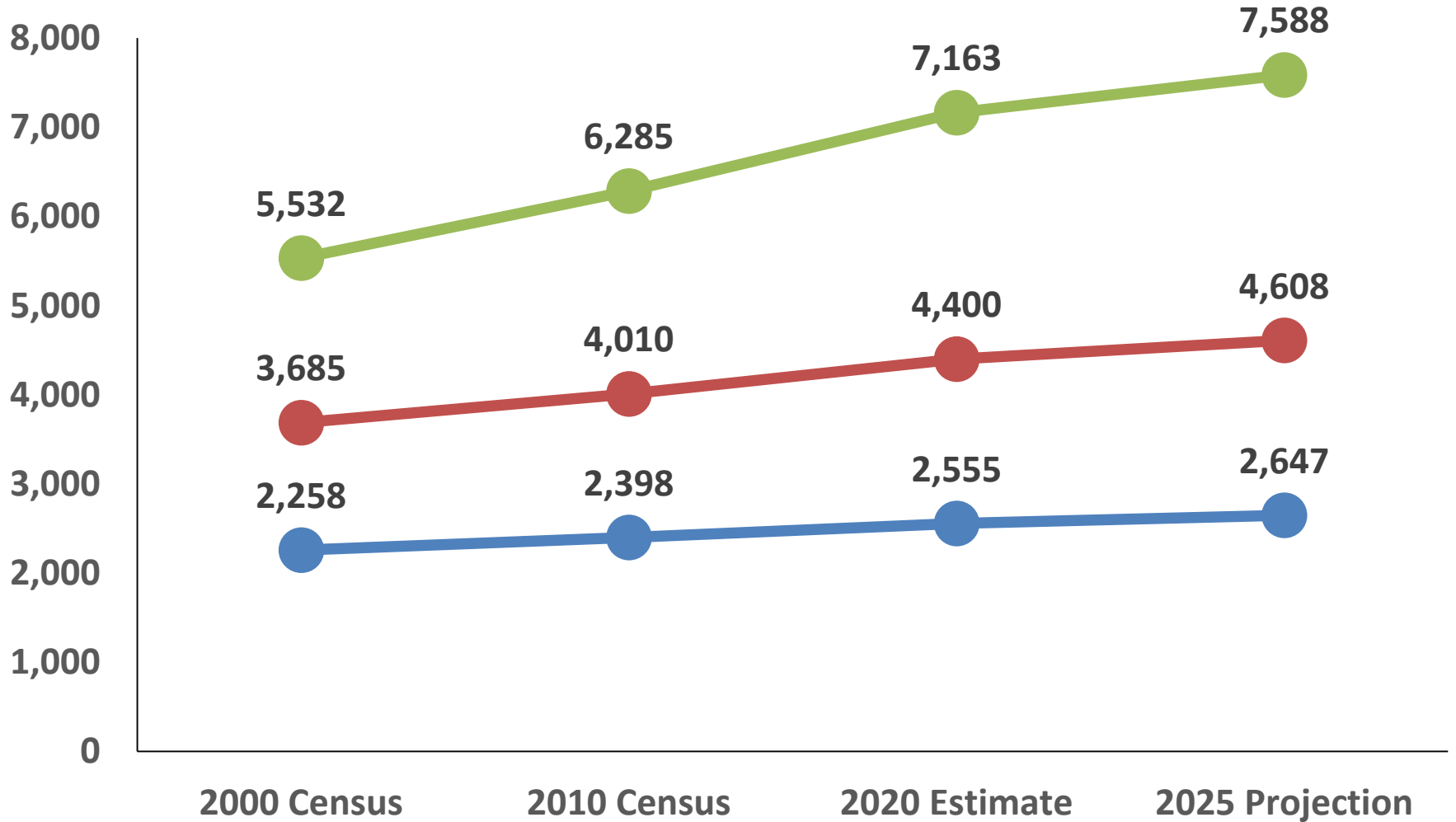


# 2020 Population



# Population Growth 2000 - 2025

● 5 Min Drive Time    ● 10 Min Drive Time    ● 15 Min Drive Time



# Age and Household Size

## 5-Minute Drive Time

- 43.17 Median Age
- 2.22 Avg HH Size

## 10-Minute Drive Time

- 45.57 Median Age
- 2.20 Avg HH Size

## 15-Minute Drive Time

- 48.65 Median Age
- 2.22 Avg HH Size



# Income & Employment

## 5-Minute Drive Time

- \$56,550 Median HH Income
- 7.48% Families Below Poverty
- 4.09% Unemployment Rate

## 10-Minute Drive Time

- \$58,894 Median HH Income
- 6.57% Families Below Poverty
- 4.25% Unemployment Rate

## 15-Minute Drive Time

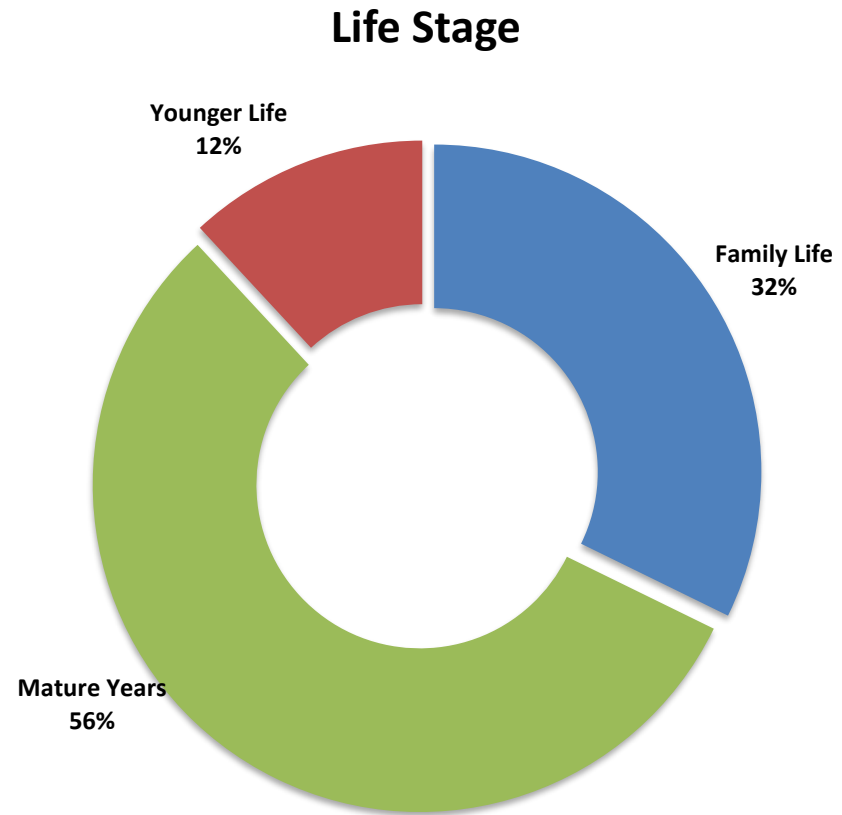
- \$62,580 Median HH Income
- 7.14% Families Below Poverty
- 4.89% Unemployment Rate



# Market Segmentation

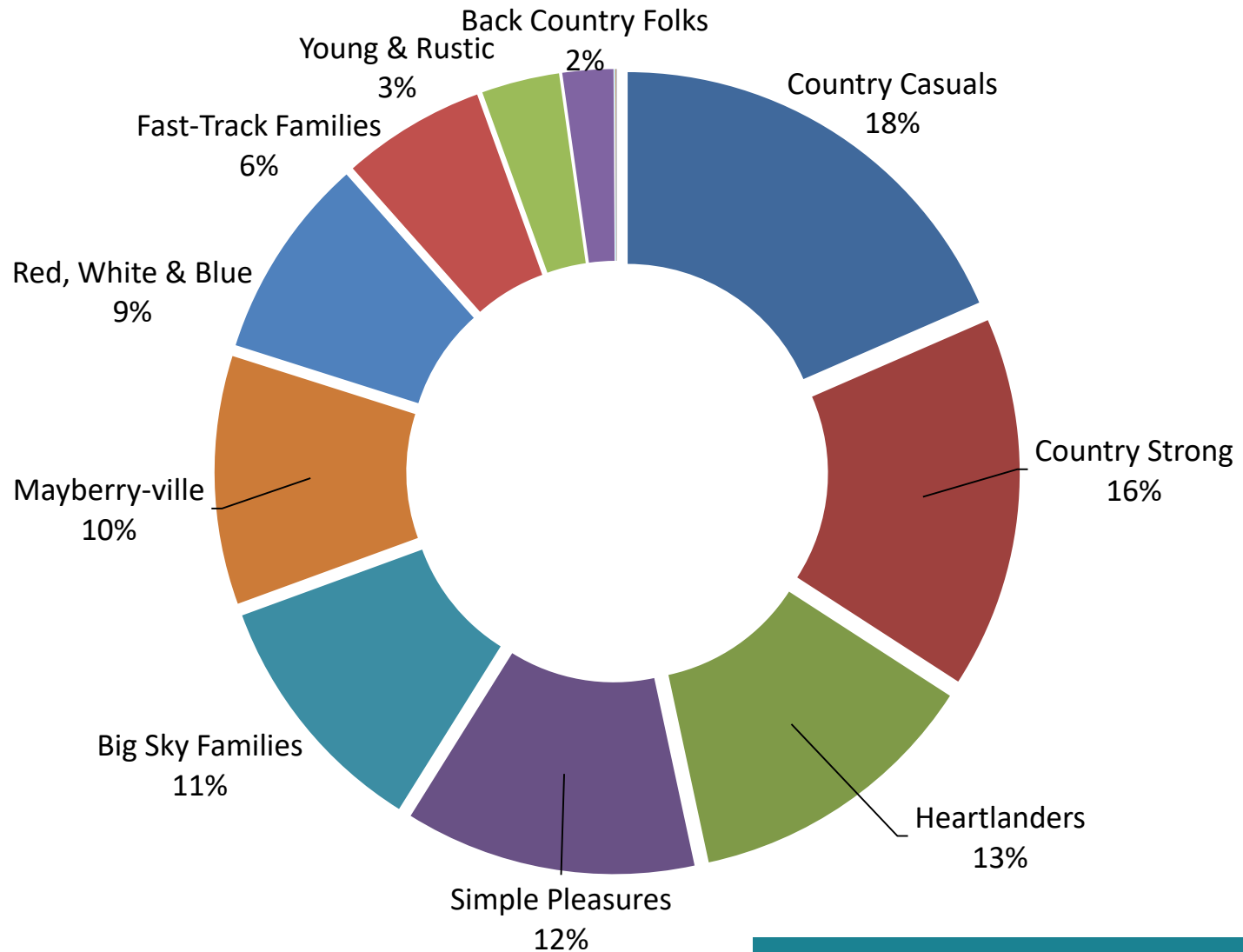
## Life Stage

- Large segment of Mature Years (56%)
- Small segment of Younger Years (12%)





# Market Segmentation





## 28 - Country Casuals

### Upper Midscale Older Mostly w/o Kids

There's a laid-back atmosphere in Country Casuals, a collection of older, upper-midscale empty-nest households. Today, these Baby-Boom couples enjoy outdoor activities, like hunting, and going out to eat but are not likely to be up-to-date on technology.

**Social Group :** 12 - T2 Country Comfort

**Lifestage Group :** 09 - M2 Conservative Classics



## 44 - Country Strong

### Lower Midscale Middle Age Family Mix

Country Strong are lower middle class families in rural areas that embrace their day-to-day lives. They are focused on their families and prefer hunting and country music to keeping up with the latest technology.

**Social Group :** 13 - T3 Middle America

**Lifestage Group :** 06 - F3 Mainstream Families



## 46 - Heartlanders

### Lower Midscale Older Mostly w/o Kids

America was once a land of small middle-class towns, which can still be found today among Heartlanders. This widespread segment consists of mostly retired older couples living in sturdy, unpretentious homes. In these communities of small families and empty-nesting couples, Heartlanders residents pursue a rustic lifestyle where hunting and fishing remain prime leisure activities along with cooking, sewing, camping, and boating.

**Social Group :** 13 - T3 Middle America

**Lifestage Group :** 10 - M3 Cautious Couples



## 52 - Simple Pleasures

### Lower Midscale Mature w/o Kids

With many of its residents over 65 years old, Simple Pleasures is mostly a retirement lifestyle: a neighborhood of lower-middle-class singles and couples living in modestly priced homes. Many are high school-educated seniors who held blue-collar jobs before their retirement.

**Social Group :** 13 - T3 Middle America

**Lifestage Group :** 10 - M3 Cautious Couples



# Retail Leakage Analysis

## **RETAIL LEAKAGE**

When local consumers  
buy more than stores sell

OR

## **RETAIL GAIN**

When stores sell more  
than locals buy



# 5-Minute Drive Time Retail Leakage

Stores Sell

**\$120.7 million**

Consumers Buy

**\$49.9 million**

Market Gains

**\$70.8 million**



# 10-Minute Drive Time Retail Leakage

Stores Sell

**\$165.6 million**

Consumers Buy

**\$96.1 million**

Market Gains

**\$69.5 million**





# 15-Minute Drive Time Retail Leakage

Stores Sell

**\$187.5 million**

Consumers Buy

**\$161.5 million**

Market Gains

**\$26 million**



	2020 Demand (Consumer Expenditures)	2020 Supply (Retail Sales)	Opportunity Gap/Surplus
<b>Totals</b>			
Total retail trade including food and drink (NAICS 44, 45 and 722)	161,493,802	187,477,108	-25,983,306
Total retail trade (NAICS 44 and 45)	142,053,783	153,778,421	-11,724,637
<b>Motor Vehicle and Parts Dealers</b>			
Motor vehicle and parts dealers (NAICS 441)	31,453,057	18,120,338	13,332,719
Automobile dealers (NAICS 4411)	26,305,213	3,386,713	22,918,500
New car dealers (NAICS 44111)	23,502,579	3,386,713	20,115,866
Used car dealers (NAICS 44112)	2,802,634	0	2,802,634
Other motor vehicle dealers (NAICS 4412)	2,724,684	12,866,996	-10,142,312
Recreational vehicle dealers (NAICS 44121)	906,386	1,440,430	-534,043
Motorcycle, boat, and other motor vehicle dealers (NAICS 44122)	1,818,298	11,426,567	-9,608,269
Boat dealers (NAICS 441222)	672,568	3,448,347	-2,775,779
Motorcycle, ATV, and all other motor vehicle dealers (NAICS 441228)	1,145,730	7,978,219	-6,832,489
Automotive parts, accessories, and tire stores (NAICS 4413)	2,423,160	1,866,629	556,531
Automotive parts and accessories stores (NAICS 44131)	1,432,957	731,854	701,103
Tire dealers (NAICS 44132)	990,203	1,134,775	-144,572
<b>Furniture and Home Furnishings Stores</b>			
Furniture and home furnishings stores (NAICS 442)	3,042,794	7,471,269	-4,428,475
Furniture stores (NAICS 4421)	1,607,230	2,111,823	-504,593
Home furnishings stores (NAICS 4422)	1,435,564	5,359,445	-3,923,882
Floor covering stores (NAICS 44221)	541,091	4,571,397	-4,030,307
Other home furnishings stores (NAICS 44229)	894,473	788,048	106,425
Window treatment stores (NAICS 442291)	99,693	0	99,693
All other home furnishings stores (NAICS 442299)	794,780	788,048	6,732
<b>Electronics and Appliance Stores</b>			
Electronics and appliance stores (NAICS 443)	2,567,924	314,072	2,253,852
Household appliance stores (NAICS 443141)	385,496	0	385,496
Electronics stores (NAICS 443142)	2,182,428	314,072	1,868,355
<b>Building Material and Garden Equipment and Supplies Dealers</b>			
Building material and garden equipment and supplies dealers (NAICS 444)	11,850,030	18,506,751	-6,656,721
Building material and supplies dealers (NAICS 4441)	10,458,438	10,946,058	-487,620
Home centers (NAICS 44411)	5,792,147	7,902,583	-2,110,435
Paint and wallpaper stores (NAICS 44412)	385,845	52,098	333,747
Hardware stores (NAICS 44413)	863,220	1,845,034	-981,814
Other building material dealers (NAICS 44419)	3,417,225	1,146,342	2,270,882
Lawn and garden equipment and supplies stores (NAICS 4442)	1,391,592	7,560,693	-6,169,101
Outdoor power equipment stores (NAICS 44421)	209,826	2,048,580	-1,838,754
Nursery, garden center, and farm supply stores (NAICS 44422)	1,181,766	5,512,113	-4,330,347

	2020 Demand (Consumer Expenditures)	2020 Supply (Retail Sales)	Opportunity Gap/Surplus
<b>Food and Beverage Stores</b>			
Food and beverage stores (NAICS 445)	19,909,590	28,618,418	-8,708,828
Grocery stores (NAICS 4451)	17,534,706	25,389,604	-7,854,898
Supermarkets and other grocery (except convenience) stores (NAICS 44511)	16,850,239	23,436,811	-6,586,572
Convenience stores (NAICS 44512)	684,467	1,952,793	-1,268,326
Specialty food stores (NAICS 4452)	616,025	1,285,035	-669,010
Meat markets (NAICS 44521)	203,264	412,051	-208,788
Fish and seafood markets (NAICS 44522)	73,837	0	73,837
Fruit and vegetable markets (NAICS 44523)	126,201	282,949	-156,748
Other specialty food stores (NAICS 44529)	212,724	590,035	-377,311
Baked goods stores and confectionery and nut stores (NAICS 445291 + 445292)	115,843	345,184	-229,341
All other specialty food stores (NAICS 445299)	96,881	244,852	-147,970
Beer, wine, and liquor stores (NAICS 4453)	1,758,858	1,943,779	-184,921
<b>Health and Personal Care Stores</b>			
Health and personal care stores (NAICS 446)	9,450,892	3,529,106	5,921,786
Pharmacies and drug stores (NAICS 44611)	7,775,048	3,529,106	4,245,942
Cosmetics, beauty supplies, and perfume stores (NAICS 44612)	596,817	0	596,817
Optical goods stores (NAICS 44613)	415,245	0	415,245
Other health and personal care stores (NAICS 44619)	663,782	0	663,782
Food (health) supplement stores (NAICS 446191)	235,493	0	235,493
All other health and personal care stores (NAICS 446199)	428,288	0	428,288
<b>Gasoline Stations</b>			
Gasoline stations (NAICS 447)	12,903,775	49,262,495	-36,358,720
<b>Clothing and Clothing Accessories Stores</b>			
Clothing and clothing accessories stores (NAICS 448)	6,585,639	800,911	5,784,727
Clothing stores (NAICS 4481)	4,847,962	510,216	4,337,746
Men's clothing stores (NAICS 44811)	250,609	0	250,609
Women's clothing stores (NAICS 44812)	1,056,098	78,240	977,858
Children's and infants' clothing stores (NAICS 44813)	160,523	192,751	-32,229
Family clothing stores (NAICS 44814)	2,804,700	0	2,804,700
Clothing accessories stores (NAICS 44815)	206,091	0	206,091
Other clothing stores (NAICS 44819)	369,941	239,225	130,716
Shoe stores (NAICS 4482)	951,517	109,936	841,580
Jewelry, luggage, and leather goods stores (NAICS 4483)	786,160	180,759	605,401
Jewelry stores (NAICS 44831)	681,905	180,759	501,146
Luggage and leather goods stores (NAICS 44832)	104,255	0	104,255

2020 Demand

(Consumer  
Expenditures2020 Supply  
(Retail Sales)Opportunity  
Gap/Surplus**Sporting Goods, Hobby, Musical Instrument, and Book Stores**

Sporting goods, hobby, musical instrument, and book stores (NAICS 451)	1,904,672	1,520,950	383,723
Sporting goods, hobby, and musical instrument stores (NAICS 4511)	1,640,303	1,520,950	119,353
Sporting goods stores (NAICS 45111)	1,074,086	1,520,950	-446,863
Hobby, toy, and game stores (NAICS 45112)	318,764	0	318,764
Sewing, needlework, and piece goods stores (NAICS 45113)	128,717	0	128,717
Musical instrument and supplies stores (NAICS 45114)	118,736	0	118,736
Book stores and news dealers (NAICS 4512)	264,369	0	264,369
Book stores (NAICS 451211)	238,358	0	238,358
News dealers and newsstands (NAICS 451212)	26,011	0	26,011

**General Merchandise Stores**

General merchandise stores (NAICS 452)	18,493,902	16,766,954	1,726,947
Department stores (NAICS 4522)	3,556,834	0	3,556,834
Other general merchandise stores (NAICS 4523)	14,937,068	16,766,954	-1,829,887
Warehouse clubs and supercenters (NAICS 452311)	12,603,926	15,231,291	-2,627,365
All other general merchandise stores (NAICS 452319)	2,333,142	1,535,664	797,478

**Miscellaneous Store Retailers**

Miscellaneous store retailers (NAICS 453)	3,214,752	8,494,170	-5,279,417
Florists (NAICS 4531)	211,756	495,613	-283,857
Office supplies, stationery, and gift stores (NAICS 4532)	699,181	1,440,250	-741,069
Office supplies and stationery stores (NAICS 45321)	307,340	0	307,340
Gift, novelty, and souvenir stores (NAICS 45322)	391,840	1,440,250	-1,048,410
Used merchandise stores (NAICS 4533)	453,418	1,254,188	-800,770
Other miscellaneous store retailers (NAICS 4539)	1,850,397	5,304,118	-3,453,721
Pet and pet supplies stores (NAICS 45391)	582,693	1,148,651	-565,958
Art dealers (NAICS 45392)	226,912	0	226,912
Manufactured (mobile) home dealers (NAICS 45393)	191,636	0	191,636
All other miscellaneous store retailers (NAICS 45399)	849,156	4,155,467	-3,306,311
Tobacco stores (NAICS 453991)	262,920	1,310,406	-1,047,486
All other miscellaneous store retailers (except tobacco stores) (NAICS 453998)	586,236	2,845,061	-2,258,825

**Non-store Retailers**

Non-store retailers (NAICS 454)	20,676,756	372,987	20,303,769
Electronic shopping and mail-order houses (NAICS 4541)	18,790,735	372,987	18,417,748
Vending machine operators (NAICS 4542)	270,634	0	270,634
Direct selling establishments (NAICS 4543)	1,615,387	0	1,615,387
Fuel dealers (NAICS 45431)	626,000	0	626,000
Other direct selling establishments (NAICS 45439)	989,388	0	989,388

2020 Demand  
(Consumer  
Expenditures2020 Supply  
(Retail Sales)Opportunity  
Gap/Surplus**Food Services and Drinking Places**

Food services and drinking places (NAICS 722)	19,440,019	33,698,687	-14,258,669
Special food services (NAICS 7223)	1,586,905	8,562	1,578,342
Food service contractors (NAICS 72231)	1,300,483	0	1,300,483
Caterers (NAICS 72232)	263,353	8,554	254,800
Mobile food services (NAICS 72233)	23,069	9	23,060
Drinking places (alcoholic beverages) (NAICS 7224)	849,817	1,087,030	-237,213
Restaurants and other eating places (NAICS 7225)	17,003,297	32,603,094	-15,599,798
Full-service restaurants (NAICS 722511)	8,273,576	14,210,982	-5,937,406
Limited-service restaurants (NAICS 722513)	7,255,912	14,795,843	-7,539,931
Cafeterias, grill buffets, and buffets (NAICS 722514)	263,068	0	263,068
Snack and non-alcoholic beverage bars (NAICS 722515)	1,210,741	3,596,269	-2,385,528
Ice cream, soft serve and frozen yogurt shops (NAICS 7225151C + 7225152)	184,514	1,886,916	-1,702,402
Doughnut shops (NAICS 7225153)	190,375	0	190,375
Bagel shops (NAICS 7225154)	55,078	386,490	-331,412
Coffee shops (NAICS 7225155)	517,872	651,122	-133,250
Cookie shops (NAICS 7225156)	8,393	94	8,299
Other snack and non-alcoholic beverage bars (NAICS 7225157)	254,511	671,647	-417,137



# Retail Leakage – Opportunities

## Leakage in 15-Minute Trade Area, Select Categories

