Village of Shorewood
Retail Market Development Plan

November 2009

Contents

Executive Summary

In April 2009, the Village of Shorewood retained Business Districts, Inc. (BDI) to provide a Retail Market Development Plan to guide the Village as it seeks to support tenant recruitment. This project focused on both Shorewood's existing businesses and on new businesses that could fill existing vacancies and anticipated new development. The assignment consisted of completing the following five project elements.

- Assembling retail attraction data for Shorewood with particular attention to demographic characteristics important to targeted recruitment efforts
- Surveying Shorewood residents and customers of Shorewood businesses to determine their current shopping and dining behaviors and potential to increase local spending based on adding desired business categories
- Identifying the current sales potential within markets available to Shorewood's existing businesses to establish market opportunities for future business recruitment
- Examining peer communities to identify possible recruitment candidates and potential programming
- Developing an information framework with useful tools to assist the Village in conducting and sustaining ongoing retail recruitment.

These tasks were divided among three project phases. Relevant project information was assembled in the first project phase. This included a review of previous data and economic development and planning reports provided to BDI by Village staff. In addition, BDI reviewed information about pending retail developments throughout the Village. Subsequent to this information review, BDI conducted a series of interviews with local developers, commercial real estate brokers, retailers, restaurateurs, and property owners. These interviews were conducted by phone and in person by BDI staff in June and July, 2009. The purpose of these interviews was to discuss current market conditions and trends. BDI also reviewed relevant demographic data from the Experian database, including Shorewood radii and drive-times. This data includes population, income, education, and spending potential for these markets:

- The Village of Shorewood
- A custom market that examined an area identified as a target by local businesses
- 5-Minute Drive Time Convenience Market
- 20-Minute Drive Time Destination Market

Concluding the first phase was a Customer Survey. After obtaining agreement from the project steering committee on the contents of the survey instrument, this computer-based survey was distributed through the Shorewood Website, Shorewood's Community Newsletter, and local merchant email lists. The survey concluded on August 7, 2009, after 528 survey responses were received. The survey reliability or confidence level is 99% with a margin of error +/- 5%. Fundamentally, these survey results identify what respondents think, not why they think the way they do. The responses also identified non-Shorewood stores and restaurants where respondents had made purchases and where they dined recently. That list offers leads on businesses likely to be good additions to commercial developments throughout Shorewood.

While the survey was in process, the second project phase began. The overall community retail leakage and market share assessment was conducted first. This leakage assessment compared sales in all Shorewood businesses to the spending power of Shorewood residents to estimate the Village market share capture. To estimate sales, Village information about the square footages occupied by Shorewood's businesses were multiplied by ULI's *Dollars and Cents of Shopping Centers 2008* median sales for that type of business. Medians were selected because interviewed Shorewood business owners reported that medians were a reasonable estimate of their sales per square foot. Using resident spending potentials researched during the first project phase, Shorewood market share by category was estimated. This analysis pointed out opportunities for improved retail performance and enhanced business attraction.

Five peer communities were evaluated during this same phase. These peer communities included Cedarburg, Waukesha, Wauwatosa, Madison's , Monroe Street, and Madison's Hilldale area. After initially considering 11 communities, the final five communities were selected in the June project meeting. This peer portion of the Shorewood study process had three objectives: to examine communities with similar characteristics and compare them with Shorewood; to assess the current retail character, lease rates, and business mix in those communities; and to identify potential business recruitment targets. Preliminary peer community, demographic, and leakage and market share results were presented in a July 10, 2009 project meeting.

After the survey was completed, tabulated, and analyzed, the survey results and the initial Plan market goals were presented at an August 17, 2009 project meeting. The analysis considered the full survey sample and survey sub-groups:

- Residents(N=387)
- New Residents: < 5 years (N=83) *Small Sample Size*
- Long-term Residents: > 10 years (N=229)
- Daytime Shoppers (N=267)
- Families with Children (N=202) *Small Sample Size*
- Pedestrians (N=148) *Small Sample Size*
- Empty Nesters (N=110) *Small Sample Size*

Key observations and detail about the survey results are included in the Survey section of this report.

At the same August meeting, BDI presented market share data revised in response to comments from the July meeting. Using this updated market share information, market share goals were developed for each of five business categories, and recruitment strategies were developed for each business category. Overall business development issues and opportunities were discussed with the steering committee at this session.

Throughout the Retail Market Development Plan process, BDI's work emphasized the unique market issues facing Shorewood's commercial areas and identified the businesses representing recruitment opportunities. Those businesses desired by survey respondents, identified in the peer communities, and recommended in the business profiles would be welcomed and likely succeed in Shorewood's other commercial centers.

Project findings are highlighted in this Executive Summary. This report's other sections compile the results of the Consumer Survey; Peer Community Review; Market Share Analysis; Strengths, Weaknesses, Opportunities and Threats, (SWOT) , Analysis; and the Recruitment Value Platform that will serve as the base for an Action Plan.

Project Highlights

To learn more detailed information on project methodology and additional documentation for the highlights of the Retail Market Development Plan reported below, consult the identified page of the full report noted in parenthesis after each item.

Survey

- With more than 80% of respondents visiting Shorewood businesses at least weekly, clearly respondents have embraced the shops of Shorewood(15)
- Even when analyzing a response that combines unduplicated respondent dining anywhere in Shorewood, utilization of Shorewood restaurants by respondents only slightly exceeds the utilization of dining options in Downtown and the East Side (13)
- More than 50% of respondents make quick visits to one or more Shorewood stores, while few report leisurely shopping (17)
- More than 60% of respondents would spend more if these businesses categories were added: Hardware, Home Accessories, Organic Green Grocer, and Specialty Foods(19)
- Existing businesses can improve sales by advising customers about the availability of desired items and/or adding those items(21)
- 133 stores were recommended as recruitment targets(22)
- More than 60% of respondents reported that they would spend more if casual dining or counter service restaurants were added(24)
- 205 restaurants were recommended as recruitment targets(26)
- More than 70% of respondents rated Shorewood commercial area's "General Safety" and "Cleanliness" "excellent" or "above average"(26)
- Less than 40% of respondents rated store hours, merchandise display, and variety of goods available "excellent" or "above average"(26)
- More than 75% of respondents rate traffic flow and parking convenience at least "average" and consequently a neutral factor when choosing a shopping destination(26)
- A filtering of survey responses show s that a combination of "Weekday" and "Saturday" store hours is convenient for 95% of the market(32)
- 64% of respondents work from home at least once per week.(29)

Although these results do identify behaviors and attitudes toward Shorewood's shopping and dining options, their primary purpose is to uncover data, like the tenants most likely to cause additional purchasing and the higher daytime population than reported in classic employee data, which aids recruitment of optimal new businesses. These survey results can open doors to desirable target businesses by providing information not available from other sources.

Peer Communities: Cedarburg, Waukesha, and Wauwatosa and the Hilldale and Monroe Street neighborhoods in Madison

Six common attributes were identified

- Effective use of existing historic buildings.
- Sympathetic infill development, incorporating parking.
- In addition to providing unique experiences, each district is readily accessible to nearby amenities such as bike paths, river walks, and other types of open space.
- Vacancies were evident in each of the peer districts.
- Traditional business mix with restaurants most visible.
- Asking lease rates in Shorewood are generally comparable or better to those in the peer communities.

All of the peer communities likely present future recruitment opportunities for Shorewood. As developers propose mixed use needing tenants, these communities offer examples of strong tenancies that could fill new leased space.

Market Share Analysis

Calculating Market Share, the portion of the total available sales won by an individual business or a group of similar businesses reveals how much potential there is to grow businesses by capturing more of the available sales. Understanding market share by category reveals the relative competitiveness of a Shorewood's offering in each business category and allows comparison of offerings in different business categories. For a shopping district, the market share is the total sales of all businesses divided by a logical market's total spending.

Market shares are examined for these markets:

- Affiliated Market: Residents of Shorewood who are proud of their community and seek to support the businesses located there
- Custom Market: Interviews with local business owners and the Project Steering Committee identified census block groups that contain residents who traditionally have supported Shorewood businesses
- Convenience Market: The population living within 5-minutes who can easily travel to Shorewood for their everyday needs
- Destination Market: The population living within 20 minutes who could be attracted to Shorewood for items or dining experiences not available closer to home.

Table 1 summarizes market share capture rates:

Table 1: Market Share Capture Rates

	Estimated Shorewood Business Sales	Shorewood Market Share	Custom Market Share	5-Minute Market Share	20-Minute Market Share
Food (Groceries)	$21,984,791	70.9%	19.20%	33.30%	2.70%
Restaurants	$20,744,798	100.1%	27.50%	47.50%	4.00%
Apparel & Accessories	$3,674,880	44.5%	12.19%	21.06%	1.75%
Home	$7,644,520	43.6%	12.10%	20.80%	1.80%
Other Retail	$31,353,237	114.7%	31.17%	54.09%	4.36%
Hair & Nail Care	$6,600,096	169.5%	41.51%	67.95%	4.20%
Total	$96,648,345	84.6%	23.01%	39.72%	3.22%

Business Opportunity Profiles

With identified business opportunities providing sales more than $56 million higher than estimated current sales, it will be necessary for existing businesses to increase their sales per square foot and for new businesses to join Shorewood's offering. Table 2 summarizes the needed changes:

Table 2: Business Opportunity Profile Summaries

	Estimated Sales	A Desired Sales	B Sales/ SF	C=A/B Supporting SF	D Existing SF	E=C-D Needed SF
Food	$21,984,791	$38,763,018	$500	77,526	45,492	32,034
Restaurants	$20,744,798	$31,084,665	$500	62,169	54,450	7,719
Apparel & Accessories	$3,674,880	$17,221,424	$350	49,204	27,788	21,416
Home	$7,644,520	$17,542,788	$250	70,171	37,381	32,790
Other Retail	$31,353,237	$27,324,658	$500	54,649	48,610	6,039
Haircare	$6,600,096	$6,600,096	existing	32,325	32,325	-
Total	$96,648,345	$138,536,649	$441	346,045	246,046	99,999
					Currently Vacant	10,500
					Office Conversion	10,000
					New Space	79,499

It is important to note that although this overall opportunity profile suggests a 43% increase in sales, it recommends adding only 27% more space. The additional volume comes from higher sales per square foot in existing as well as new businesses, filling vacancies, and moving some office uses to upper floors. These changes stresses the importance of increasing sales in existing businesses and seeking compatible adjacent businesses that encourage multiple stop shopping that increases impulse sales. There also must be a multiple businesses in each category to offer the merchandise choices that attract the comparison shopping behavior that increases spending. Detailed information on each category begins on page 51.

SWOT Analysis

The analysis of Shorewood's commercial area's Strengths, Weaknesses, Opportunities, and Threats suggests these statements, the Recruitment Value Platform, should be used to attract new businesses:

1. Shorewood offers well sized commercial clusters where new businesses share customers with established community serving businesses
2. Vintage spaces and new spaces in a variety of sizes offer space suitable for nearly any specialty retail or restaurant business
3. Shorewood property and business owners have the opportunity to achieve above market returns on investment by meeting national norms for sales per square foot.
4. Shorewood's nearby population supports businesses of all types.
5. Strong government support stabilizes investment in Shorewood stores and restaurants
6. Shorewood's customers experience the pleasure of very walkable shopping districts.

Summary

Although the Retail Business Development Plan captures a statistical snapshot of Shorewood's existing condition and market, that information is a benchmark, not the project goal. That benchmark will allow Shorewood to measure growth as businesses seek to improve their sales per square foot to the same level as other metropolitan area shopping districts where businesses routinely exceed national medians by capitalizing on high spending power markets. The tools established through this project and detailed in the report that follows are designed to be updated by the staff and to be a competitive advantage as the Village supports property owner's efforts to improve tenant performance and recruit new tenants.

Survey

In an effort to determine what businesses, events, promotional materials, and policies would attract new tenants and a larger share of resident's time and dollars to Shorewood's commercial areas, Village staff asked BDI to develop a survey instrument to poll Shorewood residents and shoppers.

Methodology

At a June 12, 2009 meeting, the Project Steering Committee reviewed recommended questions that had been used in previous, web based consumer surveys and suggested changes that made the survey better fit the needs of Shorewood. The revised survey was pretested on approximately 10 people, and question-clarifying adjustments were made before June 16, 2009 when the survey link was placed on the Village website and it was announced in the Village newsletter. Responses were accepted through August 7, 2009. This report documents the 528 responses to the web-based survey. To determine whether the response sample is representative, the table below compares the age of survey respondents to the population of Shorewood as a whole.

Table 3: Survey Sample

Age:	Adult Population	Survey Response
Under 25	7.9%	2.5%
Age 25 - 34	17.7%	8.4%
Age 35 - 44	18.3%	27.1%
Age 45 - 54	23.6%	29.0%
Age 55 - 64	15.5%	21.4%
Age 65 - 74	8.2%	10.0%
Age 75 +	8.8%	1.5%

Although the survey response appears to under-represent the population under 35 and over-represent the 35 to 64 age group, the older population is a high-spending cohort that is critical to the success of Shorewood's commercial areas. With 528 responses, it is possible to isolate the underrepresented cohorts if a potential tenant is interested in learning more about respondents' answers to specific questions. Consequently, this sample can be used to understand the community's impressions of Shorewood's commercial districts and their aspirations for those districts. In response to steering committee questions about a potential underrepresentation of an "empty nester" lifestyle group, additional investigation revealed that, although respondents designated themselves empty nesters in a smaller proportion than census reports the actual proportion to be, the empty nester group answered question similar to the residents of a similar age who have lived in Shorewood 10 years or more, 49.5% of the respondents. Consequently, efforts to weight answers or seek more responses from that group are unlikely to alter survey results.

This Table illustrates the reliability of the survey population by calculating confidence that the results reflect true population proportions:

Table 4: Confidence Interval Calculator Results

Confidence Level:	99%	99%
Sample Size:	528	528
Observed Study Results:	50% (264 frequency)	75% (396 frequency)
Confidence Interval:	**± 5.61%**	**± 4.85%**
True Population Proportion Range:	**44.39% to 55.61%**	**70.15% to 79.85%**
Source: http://dimensionresearch.com/resources/calculators/conf_prop.html		

How to Interpret "Confidence Level"

If you interview 528 people, and find that 50% of them answer a question in a particular way and you desire your confidence level to be 99%, the corresponding confidence interval is ± 5.61%. That is to say that you are 99% certain that the true population proportion falls into the range from 44.39% to 55.61%. Also stated, at this confidence level and this sample size there will be a one-in-one hundred chance that the true population proportion will fall outside the calculated range. When 75% of the responses are the same, the corresponding confidence level is narrower, ± 4.85%. Generally, for the full sample, there is a significant difference in answers that vary more than 5%.

The analysis that follows documents the full response and the response variation in these six subgroups. (Note that N = the number of respondents in each group.)

- Residents (N=387)
- New Residents: < 5 years (N=83) *Small Sample Size*
- Long-term Residents: > 10 years (N=229)
- Daytime Shoppers (N=267)
- Families with Children (N=202) *Small Sample Size*
- Pedestrians (N=148) *Small Sample Size*

Smaller sample sizes mean that variations greater than ± 10% are most likely to suggest true differences from the population as a whole.

In calculating percentages of respondent's satisfaction or inclination to spend, "I don't know" responses were removed from the totals before rankings were created. Making this adjustment removed potential misinterpretation that results when an unusually high "I don't know" response reduces the favorable response percentage compared to other items with a lower "I don't know response."

Based on the survey analysis, there are observations about the results and, where appropriate, recommendations suggesting recruitment targets and ways to improve the sales and profitability of Shorewood businesses. The appendix details the responses to opened ended questions and provides comparison to surveys completed in other communities.

Question 1: In an average month, how many times do you dine in these commercial areas?

This question details the respondents dining frequency for Shorewood commercial districts, and alternative commercial districts. The subgroup response analysis compares the percent of respondents who reported visiting each area at least once per month.

Table 5: In an average month, how many times do you dine in these commercial areas?

How often do you dine in these commercial areas?						
Answer Options	**Never**	**A few times per year**	**A few times per month**	**Weekly**	**A few times per week**	**Response Count**
Oakland North	68	280	127	27	16	518
Other Shorewood	55	288	123	38	8	512
Whitefish Bay	236	214	29	4	2	485
East Side & Downtown	16	250	169	59	24	518
Bayshore	100	293	92	16	1	502
3rd Ward & Walker's Point	104	296	61	19	9	489
Other (please specify)						35
					answered question	**524**
					skipped question	**4**

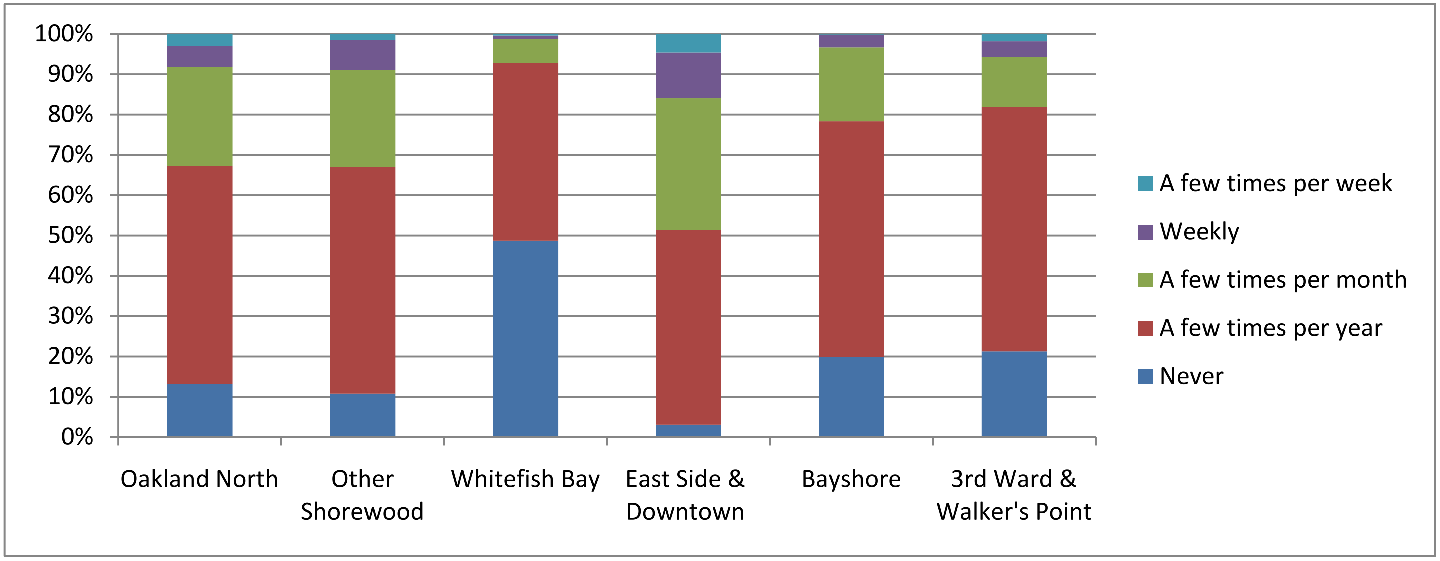

Figure 1 Dining Frequency by location

With only 59 respondents indicating that they visit both "Oakland North" and "Other Shorewood" a few times per month, the total Shorewood visits actually exceed the visits to East Side & Downtown.

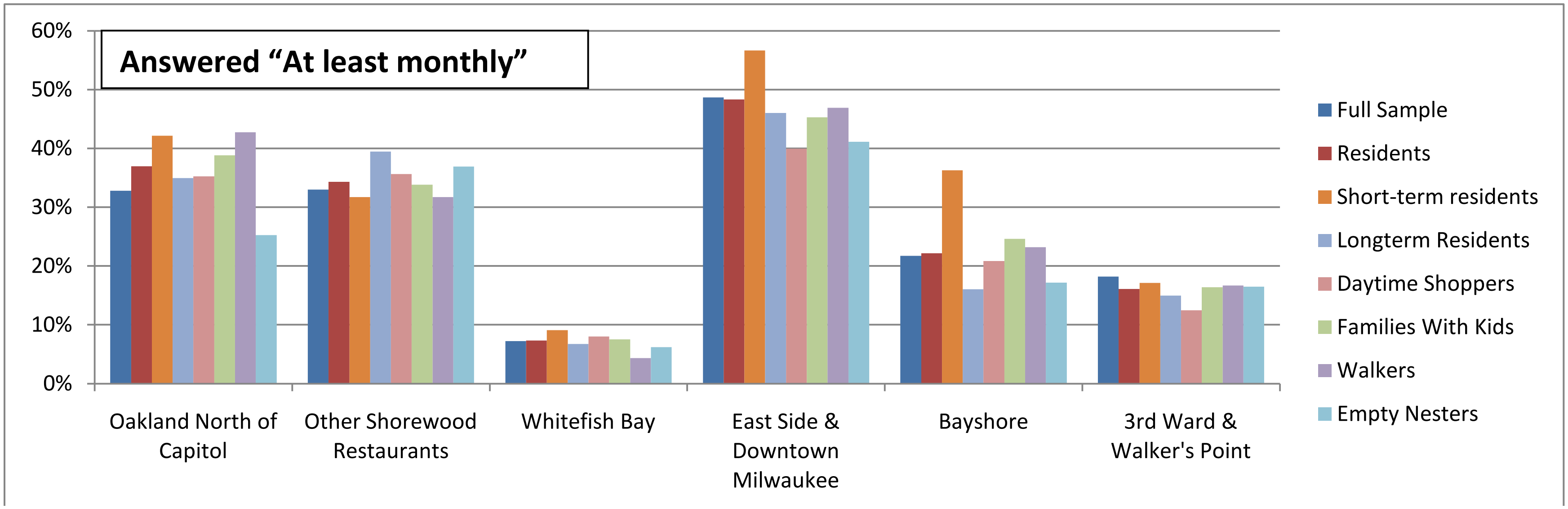

Figure 2: Dining Summary Graphic

Observations

- Employment outside of Shorewood may account for higher weekly utilization of East Side and Downtown Restaurants
- Overall marketing needs to encourage substitution of Shorewood locations for Bayshore and East Side/Downtown locations rather than other Shorewood locations.

Question 2: In an average month, how many times do you make a purchase in these commercial areas?

This question details the respondents shopping frequency for Shorewood North of Oakland, other Shorewood commercial districts, and alternative commercial districts.

Table 6: In an average month, how many times do you make a purchase in these commercial areas?

How often do you make a purchase in these commercial areas?						
Answer Options	**Never**	**A few times per year**	**A few times per month**	**Weekly**	**A few times per week**	**Response Count**
Oakland North	25	80	81	150	182	518
Other Shorewood	32	162	180	83	47	504
Whitefish Bay	95	259	112	33	8	507
East Side & Downtown Milwaukee	57	243	145	48	14	507
3rd Ward	151	288	43	9	2	493
Bayshore	18	237	218	32	9	514
The Internet	36	244	170	46	13	509
Other (please specify)						33
					answered question	**523**
					skipped question	**5**

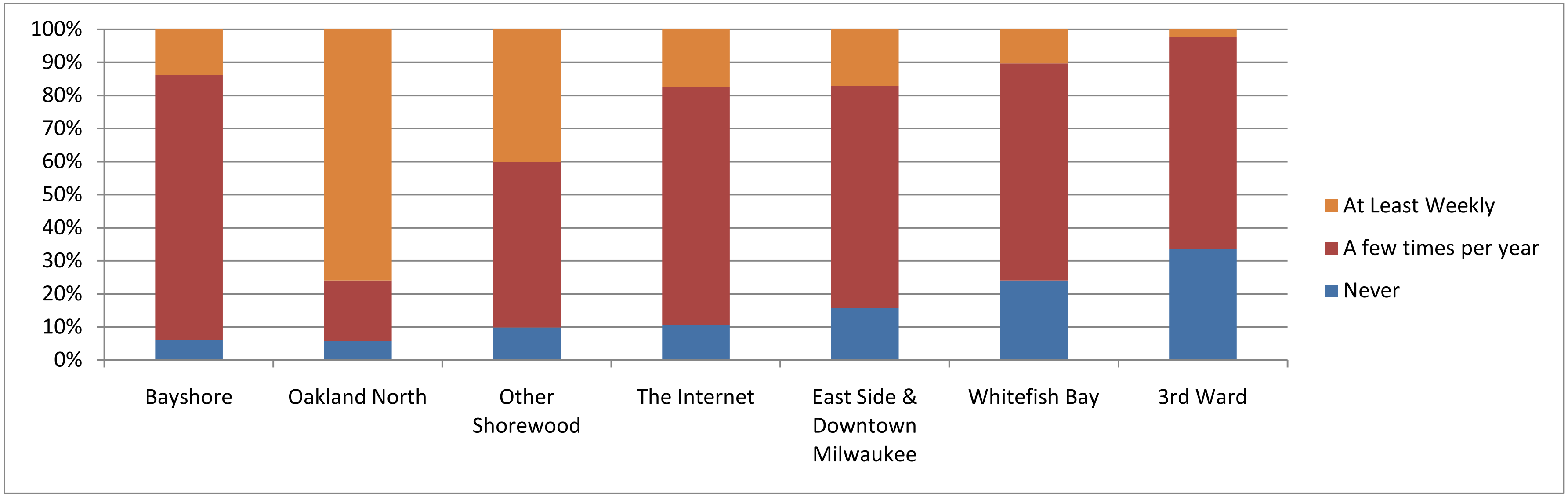

Figure 3: Shopping Summary Graphic 1

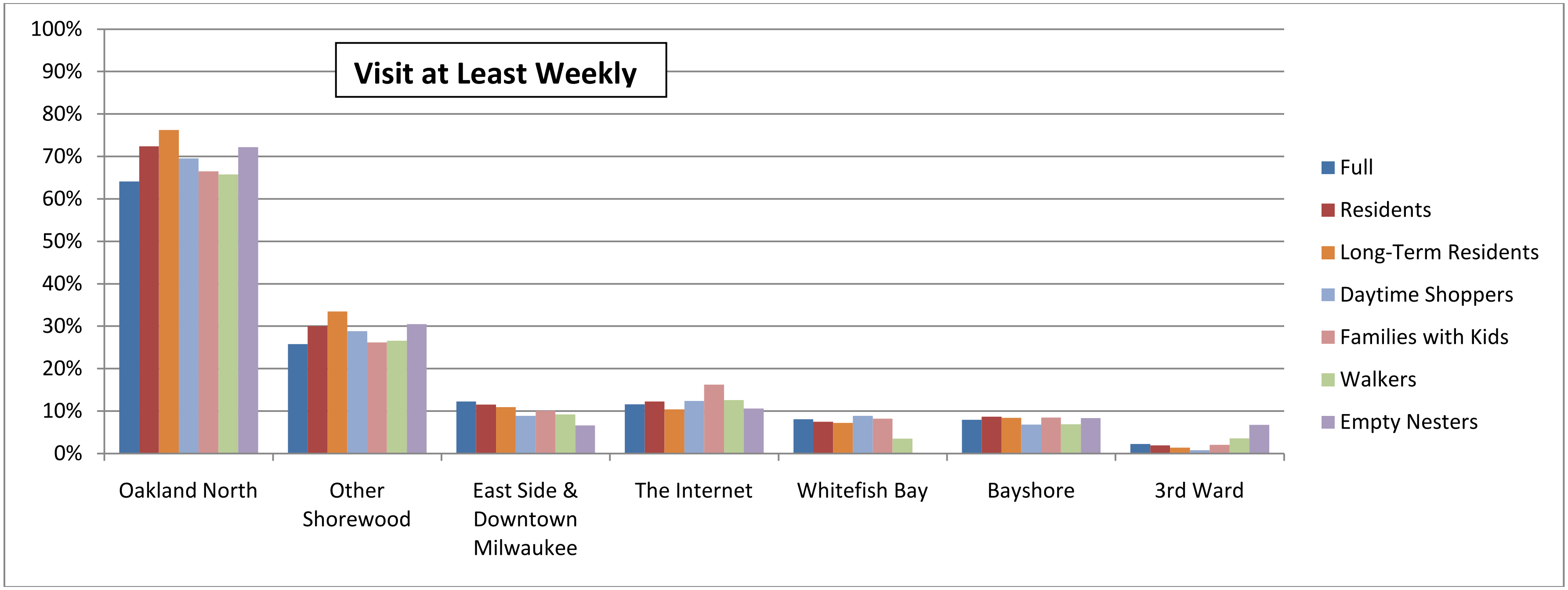

Figure 4: shopping Summary Graphic 2

Observations

- Clearly the residents of Shorewood have embraced the shops of Shorewood
- Grocery shopping is the most common form of weekly shopping so Oakland North with its grocery stores has a higher utilization rate
- It may be possible to increase dining frequency by marketing dining options at more frequently visited shopping locations like Walgreens and Pick 'N Save.

Question 3: When shopping in Shorewood, how often do you:

This question seeks to understand how respondent's currently utilize the businesses in Shorewood. The results help policy makers determine parking policies and support the need to promote multi-stop visits as a way to improve store and restaurant sales and profitability.

Table 7: When shopping in Shorewood, how often do you:

When shopping in Shorewood, how often do you:						
Answer Options	**Never**	**A few times each year**	**Weekly**	**A few times each week**	**Daily**	**Response Count**
Quickly enter a store, make a purchase, and end your shopping trip	16	102	166	140	35	473
Visit multiple businesses with a plan to purchase specific items as quickly as possible	54	144	152	82	9	469
Leisurely shop and dine for less than 2 hours	157	220	41	11	0	462
Leisurely shop and dine for more than 2 hours	292	133	8	4	0	456
Visit with guests from another community	142	243	36	10	3	454
					answered question	**483**
					skipped question	**45**

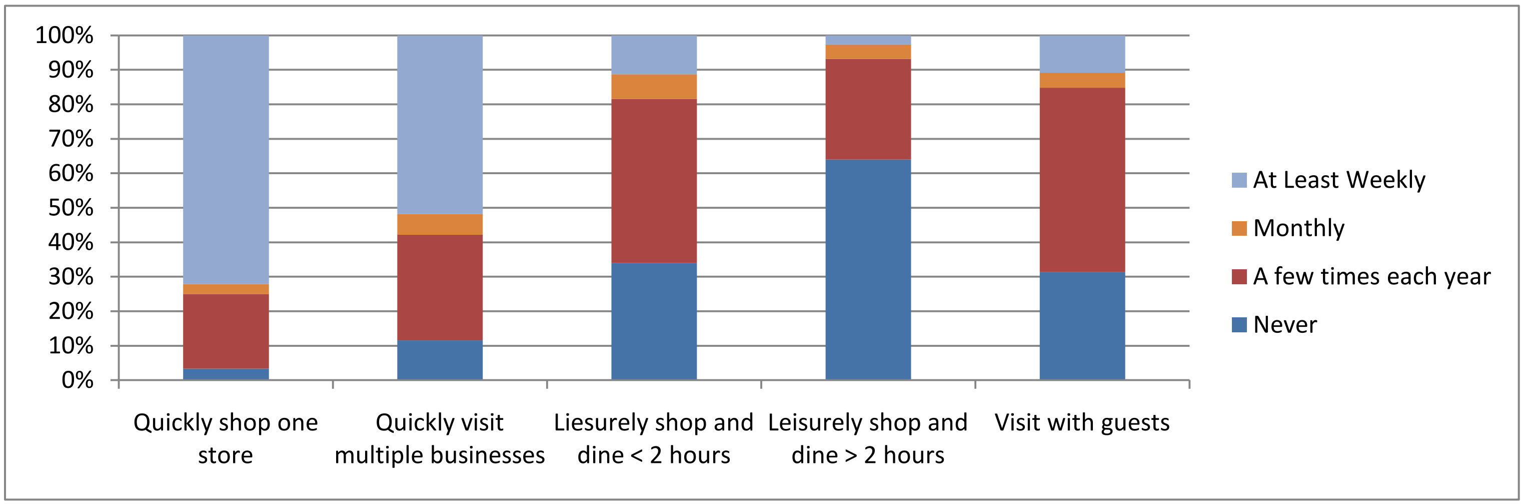

Figure 5: Shopping Behavior Summary

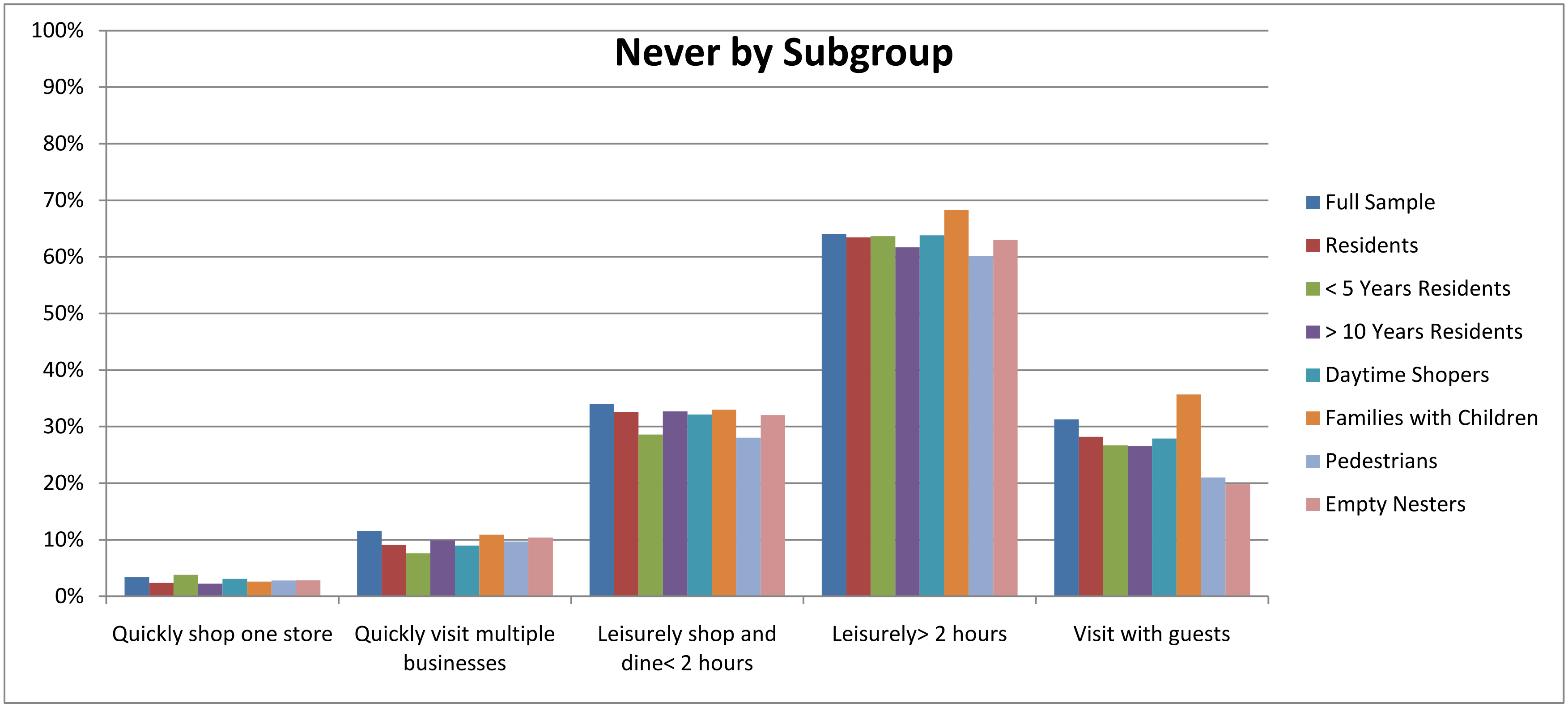

Figure 6: Shopping Behavior by Subgroup Summary Graphic

Observations

- All subgroups are remarkable similar in their utilization pattern
- A two hour limit on most parking spaces seems to fit existing utilization.

Question 4: How would the addition of these stores and services affect the amount that you spend in Shorewood?

This question provides information on the most desirable items and new tenants. The analysis examines how spending behavior is project to change if various business categories were added to Shorewood's business mix. Although the graph below sorts the response from the most to least likely to attract spending, during the survey responses were randomizes so the order would not impact the results.

Table 8: How would the addition of these stores and services affect the amount that you spend in Shorewood?

Answer Options	I would spend a lot more	I would spend a little more	No change	I do not know	Response Count
Hardware	199	196	73	7	475
Organic Green Grocer	110	182	167	10	469
Health Food	92	178	189	15	474
Sporting Goods	81	177	194	12	464
Gardening Supplies	79	173	198	16	466
Craft Supplies	73	169	211	16	469
Home Accessories	72	223	149	21	465
Pet Supplies	72	142	238	11	463
Fine Wine & Spirits	70	149	234	11	464
Specialty Prepared foods	69	208	166	25	468
Women's Apparel	55	174	226	14	469
Greeting Cards/Gifts	52	175	227	14	468
Children's Apparel	36	109	311	16	472
Make-up/Cosmetics	23	77	349	13	462
Furniture	22	139	281	19	461
Art Gallery	19	71	360	11	461
Fast Print/Photocopy	18	99	334	14	465
Costume Jewelry	10	63	374	13	460
Men's Apparel	10	118	316	19	463
Video Game Store	8	51	384	15	458
Fine Jewelry	4	29	408	16	457
Florist	4	69	376	10	459
Other (please specify)					81
				answered question	**486**
				skipped question	**42**

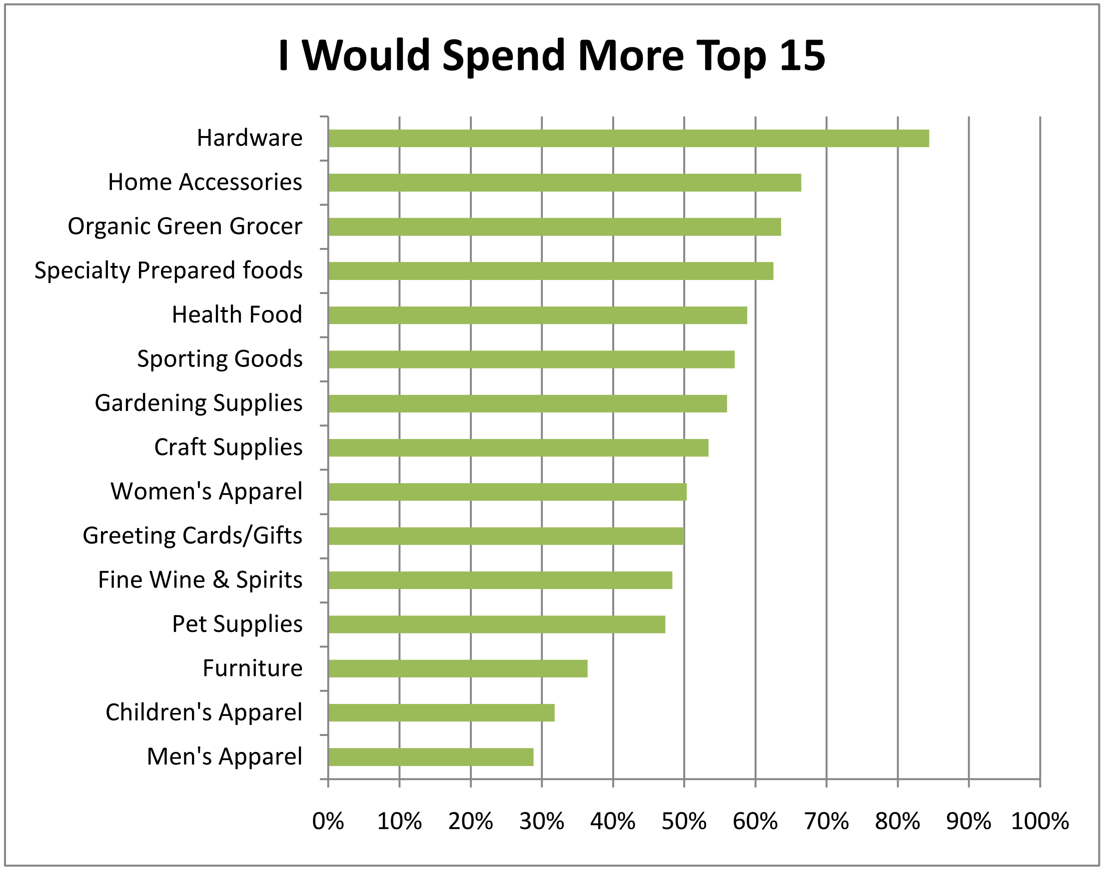

Figure 7: Desired Businesses Summary

Observations

- Existing businesses can immediately respond to this information by adding requested items and advertising that the requested items are in stock
- Any item with more than 50% of respondents reporting that they would spend more if that store category were offered is a compelling recruitment statement
- This report “Action Plan and Business Recruitment Supplement” examines national and local hardware site location trends.

Question 5: In the last month, what have you purchased that you wish you could have bought in Shorewood?

This question provides information that will be useful in encouraging existing and potential businesses to tailor their offering to the items most desired by survey respondents. The table identifies goods purchased by survey respondents.

Table 9: Outside Purchases Summary

Purchase and #			
Hardware and Lumber	150	Toys and Games	13
Books, CDs, DVDs	113	Specialty and Prepared Foods	13
Gardening Supplies	77	Home Accessories	12
Apparel	49	Wine and Spirits	11
Organic Groceries and Health Food	43	Outdoor Equipment	9
Dining-Related	41	Kitchenwares	9
Sporting Goods	40	Home Furnishings and Appliances	9
Pet Food and Supplies	32	Bakery Goods	9
Food and Groceries	28	Retailer/Retail Format Suggestions	8
Children's Apparel	27	Office Supplies	8
Arts, Crafts and Hobbies	27	Men's Apparel	7
Women's Apparel	24	Services	6
Computers and Electronics	22	Cosmetics and Jewelry	6
Gifts and Cards	21	Art & Collectibles	3
Household Items	19	Entertainment	2
General Comments	17		

Observations

1. It is important to recognize that many of the items are or could be carried by existing businesses. The quickest way to attract more purchasing is to encourage those businesses to advertise these items
2. At the request of the steering committee, BDI examined the hardware industry and the report supplement contains information on industry coverage standards that shows Shorewood served by stores near its borders
3. The rank ordering ignores potential fit between available space and the needs of the listed business category.

Question 6: Please provide the name and location of the store where you made that purchase.

This question provides a list of recruitment targets. Table 10 indicates those stores with the greatest number of purchases indicated by survey respondents. Table 10 lists Retail venues patronized by survey respondents and Appendix 1 is a complete list of the stores provided (excluding those in the first table).

Table 10: Top Retailer Requests

Top 10 Retailers	
72	Home Depot
60	Ace-North Shore
47	Target
36	Barnes & Noble
27	Pets Supplies Plus
26	Whole Foods
24	Downer Hardware
21	Kohl’s
21	Stein’s/Bliffert’s
20	Borders
17	Boswell's, Next Chapter
17	Outpost

Observations

1. The nature of this question reveals the price points and merchandise categories as well as generating a list of potential recruitment targets
2. Space constraints and nearby market coverage from existing locations may preclude recruiting these businesses.

Question 7: In an average week, how much would you estimate that your household spends on meals away from home (full-service restaurants, take-out, drive-through, etc.)?

This question quantifies the amount that could be spent by respondents on various dining options in Shorewood.

Table 11: In an average week, how much would you estimate that your household spends on meals away from home?

In an average week, how much would you estimate that your household spends on meals away from home (full-service restaurants, take-out, drive-thru, etc.)?		
Answer Options	**Response Percent**	**Response Count**
Less than $25	16.2%	76
$25 to $49.99	31.3%	147
$50 to $74.99	20.7%	97
$75 to $99.99	15.8%	74
$100 to $199.99	13.2%	62
Over $200	2.8%	13
	answered question	**469**
	skipped question	**59**

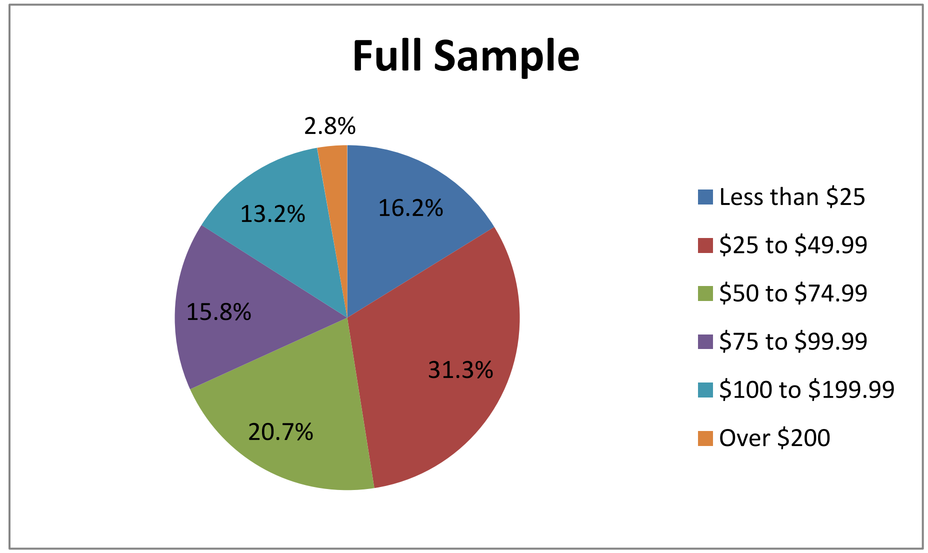

Figure 8: Restaurant Total Spending Graphic

Observations

- The national economy has probably impacted the respondents' answer to this question by lowering estimated weekly expenditures
- As potential tenants view this information it helps insetting menus and associated pricing.

Question 8: How would the addition of these restaurants affect the amount you spend in Shorewood?

This question provides information on the most desirable new restaurant categories.

Table 12: How would the addition of these restaurants affect the amount you spend in Shorewood?

Answer Options	I would spend a lot more	I would spend a little more	No change	I do not know	Response Count
Casual dining (family oriented menu, with full service)	132	214	100	15	461
Counter service restaurant (Order at counter, employee brings food to the table or carryout)	70	202	171	18	461
White table cloth restaurant (Leisurely dining, gourmet food, prices matching full service level)	43	189	214	20	466
Bar or Club (Limited food options and a focus on entertainment or sports)	43	102	287	23	455
Quick service restaurant (Order and receive food at counter, drive thru service)	42	106	291	21	460
				answered question	**470**
				skipped question	**58**

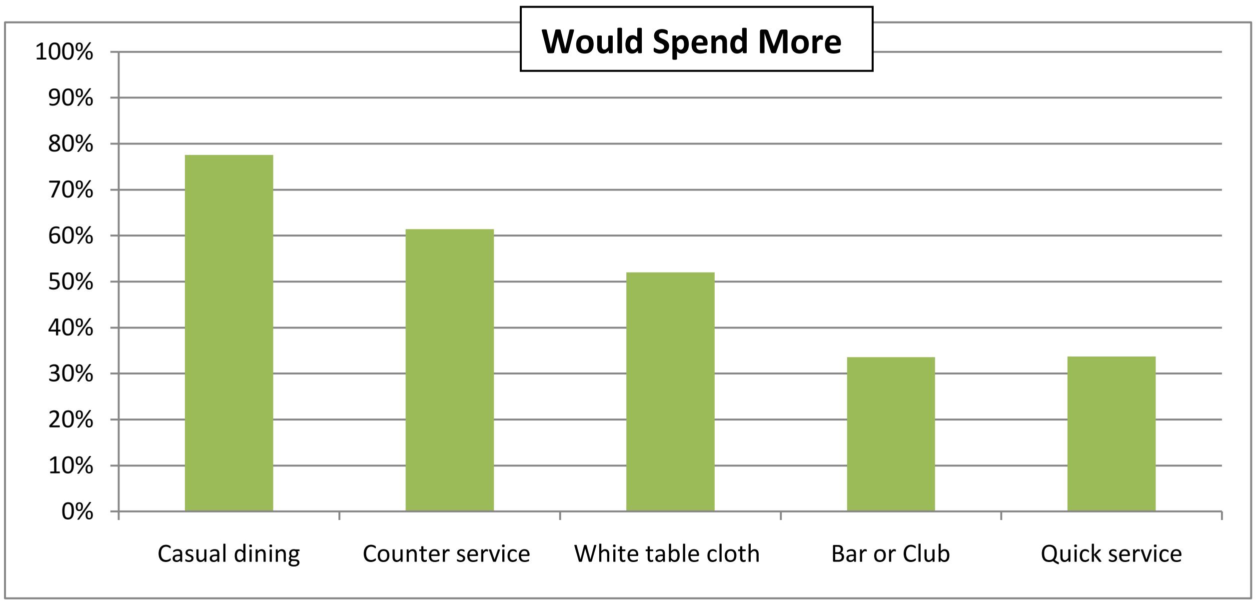

Figure 9: Spending by Restaurant Type Summary Graphic

Observations

- Current restaurants can benefit from promoting casual dining
- The relatively high inclination to spend more across multiple categories shows a desire to add more restaurants in general that should be noted by building owners in all Shorewood commercial areas.

Question 9: In the past month, what non-Shorewood restaurants did you patronize that you believe would be good additions to Shorewood?

This question provides tenant suggestions for multiple dining formats. The most patronized restaurants by numbers of responses are in Table 13. Table 14 notes recommended types and formats and Appendix 2 is a complete list of all restaurants patronized and listed by survey respondents.

Table 13: Most Requested Restaurants

Top 10 Restaurants	
46	Beans and Barley
22	Alterra
21	Panera
19	Café Hollander
17	Qdoba/Chipotle
17	Noodles & Company
14	Mexican
12	Lake Park Bistro/Ristorante Bartolotta
10	Maharajah
9	Subway

Table 14: Requested Restaurant Formats

Restaurant Type/Format Suggested	
Asian	Indies/ Non-chain
Breakfast	Italian
Brewpub	Japanese
Brunch	Mexican
Burgers	Middle Eastern
Casual affordable dining	Organic/Natural
Chili	Outdoor Dining
Chinese	Pancake House
Deli	Seafood
Diner	Sitdown or Family style Pizza
Dog Bar	Steak
Family	Sushi
Gluten-free	Tapas
Greek	Thai
High-end/Fine Dining	Vegetarian
Indian	Wood fired Pizza

Observations

1. Existing businesses could use the requested formats to gain direction for specials and advertising
2. The goal is not to move requested restaurants but to get experienced operators to open a second location in Shorewood.

Question 10: Rate your overall satisfaction with these factors as they apply to Shorewood:

This question provides general guidance on elements of the general Shorewood experience. The summary table and accompanying graph compare the ratings of “Excellent” and “Very Good” for each factor.

Table 15: Rate your overall satisfaction with these factors as they apply to Shorewood:

Answer Options	Excellent	Above Average	Average	Below Average	Awful	I Don't Know	Response Count
General safety	101	223	114	12	2	5	457
Cleanliness of streets and sidewalks	89	260	93	13	3	1	459
Friendliness of employees	62	207	170	12	2	7	460
Attractiveness	49	221	142	39	6	0	457
Pedestrian safety	48	169	169	50	13	5	454
Bicycle access	46	170	151	41	7	44	459
Special events	36	129	159	58	13	57	452
Quality of goods available	35	171	190	47	9	5	457
Knowledge of employees	34	173	193	12	1	39	452
Parking convenience	33	120	187	88	25	5	458
Merchandise displays	27	124	239	35	6	22	453
Store hours	23	103	253	47	7	19	452
Traffic flow	17	90	234	80	29	7	457
Variety of goods available	9	58	189	154	30	6	446
						answered question	**461**
						skipped question	**67**

Table 16: Satisfaction Ranking

Summary Table	At least Above Average
Cleanliness of streets and sidewalks	76.2%
General safety	71.7%
Friendliness of employees	59.4%
Attractiveness	59.1%
Bicycle access	52.0%
Knowledge of employees	50.1%
Pedestrian safety	48.3%
Quality of goods available	45.6%
Special events	41.8%
Merchandise displays	35.0%
Store hours	29.1%
Variety of goods available	15.2%
	Average or Better
Parking convenience	75.1%
Traffic flow	75.8%

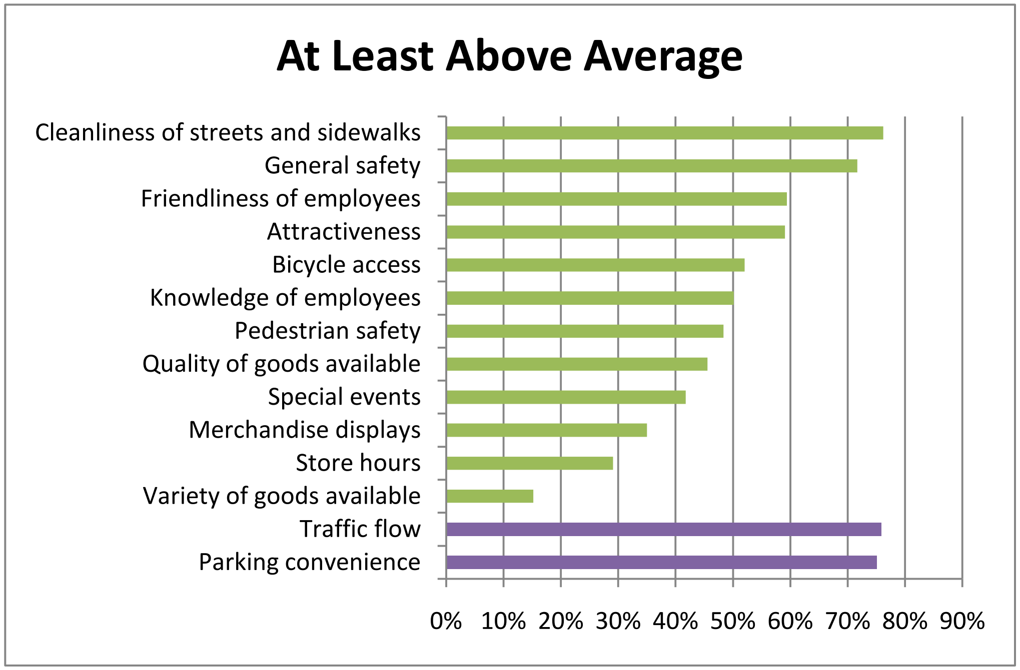

Figure 10: Satisfaction Summary Graphic

Note: Purple Bars also include ratings of "Average."

Observations

- The high ratings associated with government controlled aspects like safety and cleanliness confirm the success of Village investment
- The parking and traffic flow comparison includes average ratings because average suggest adequate competition with other shopping options without incurring the high cost of rising above average, destruction of buildings for lots or structured parking and the loss of parking to enhance traffic flow
- Using the e-mail addresses provided in response to question 18, it would be possible to create a focus group of people who rated events as average or below to learn more about their specific issues.

Question 11: When is it most convenient for you to shop?

This question seeks to clarify the optimal operating hours for Shorewood Businesses.

Table 17: When is it convenient for you to shop? (Check all that apply)

Answer Options	Response Percent	Response Count
Daytime	57.9%	267
Evening	77.4%	357
Saturday	80.7%	372
Sunday	72.2%	333
	answered question	**461**
	skipped question	**67**

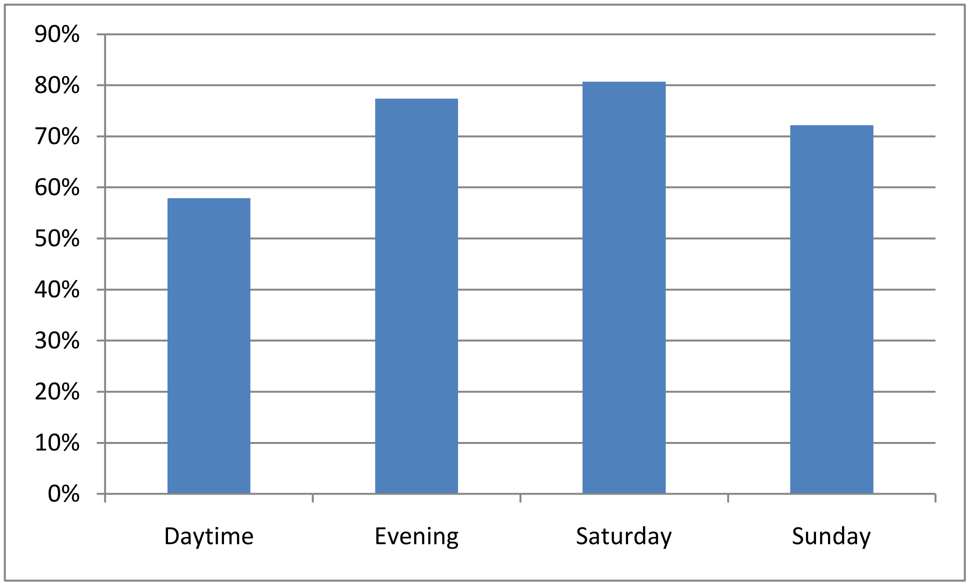

Figure 11: Shopping Time Choices Summary Graphic

Observations

- A filtering of survey responses show s that a combination of "Weekday" and "Saturday" is convenient for 95% of the market
- Additional research on how late evening is may demonstrate that just extending hours until 7 meets the needs of "Evening" shoppers. If daytime can be pushed back to 11, it may be possible to improve convenience without increasing payroll
- Although not directly queried with this question, interviews conducted for this project confirmed that it is most important to be open posted hours.

Sample Characteristics

Questions 12 through 16 were used to create the subgroups.

Table 18: Q 12. How long have you lived in Shorewood?

Q 12. How long have you lived in Shorewood?		
Answer Options	**Response Percent**	**Response Count**
I do not live in Shorewood	16.4%	76
Less than 1 year	2.4%	11
1 to 5 years	15.6%	72
5 to 10 years	16.2%	75
10 or more years	49.5%	229
	answered question	**1,014**
	skipped question	**107**

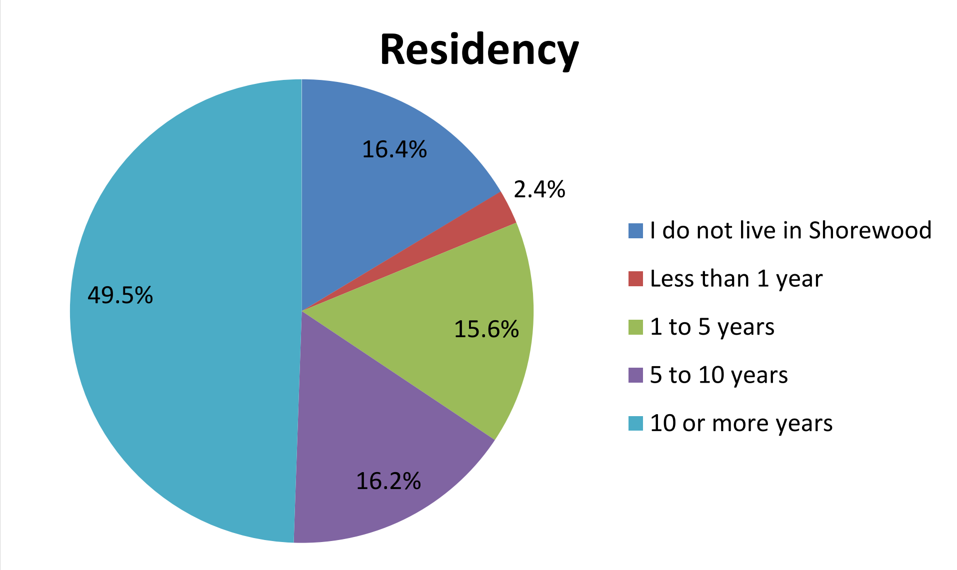

Figure 12: Residency Summary Graphic

Table 19: Q 14. If you are employed, please tell us how frequently you work from home?

Q 14. If you are employed, please tell us how frequently you work from home?		
Answer Options	**Response Percent**	**Response Count**
Never	35.8%	162
Less than 20%	30.1%	136
Between 20% and 50%	11.3%	51
Over 50%	7.5%	34
home based business	15.3%	69
	answered question	**452**
	skipped question	**76**

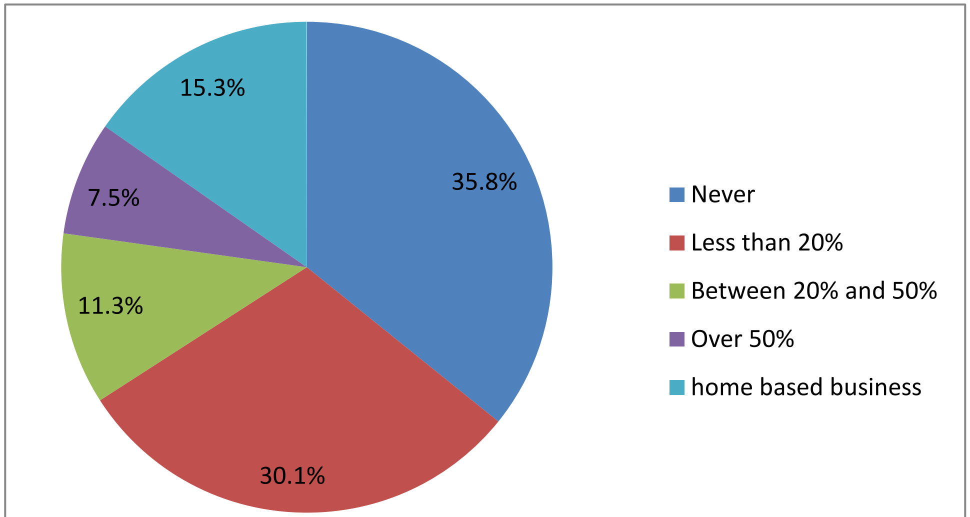

Figure 13: Telecommute Summary Graphic

Table 20: Choose the answer that best describes your household.

Choose the answer that best describes your household.		
Answer Options	**Response Percent**	**Response Count**
I live alone	10.6%	107
Empty Nester	14.0%	142
Double Income No KidS	11.6%	118
Two or More Adults	13.8%	140
Family with Children	45.8%	464
Other	4.2%	43
	answered question	**1,014**
	skipped question	**107**

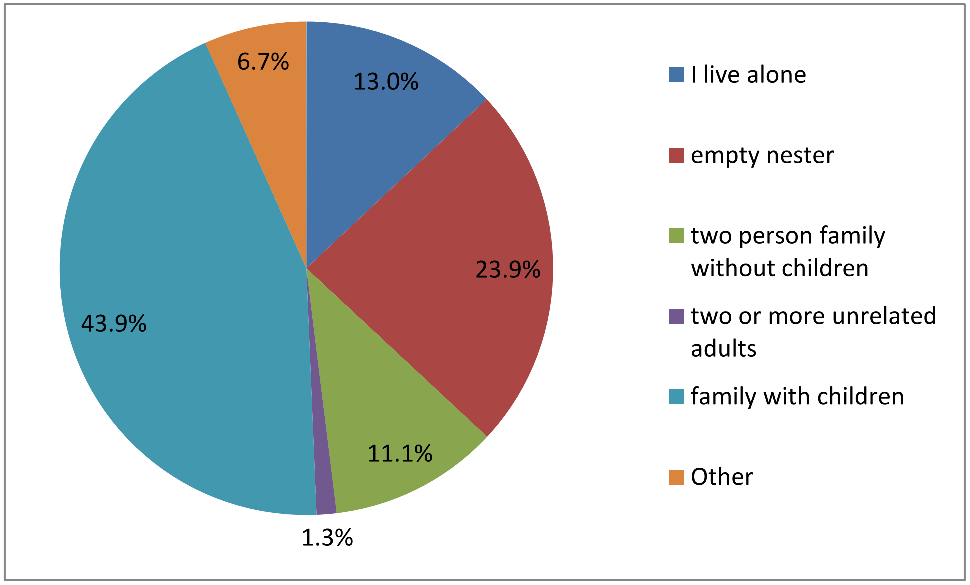

Figure 14: Family Lifestyle Summary Graphic

Table 21: Please choose the category that best describes how you usually travel to Shorewood to shop and dine.

Please choose the category that best describes how you usually travel to Shorewood to shop and dine.		
Answer Options	**Response Percent**	**Response Count**
I walk	32.1%	148
I bicycle	5.6%	26
I drive in 5 minutes or less	52.5%	242
I drive but it takes more than 5-minutes	9.3%	43
I use public transit	0.4%	2
	answered question	**461**
	skipped question	**67**

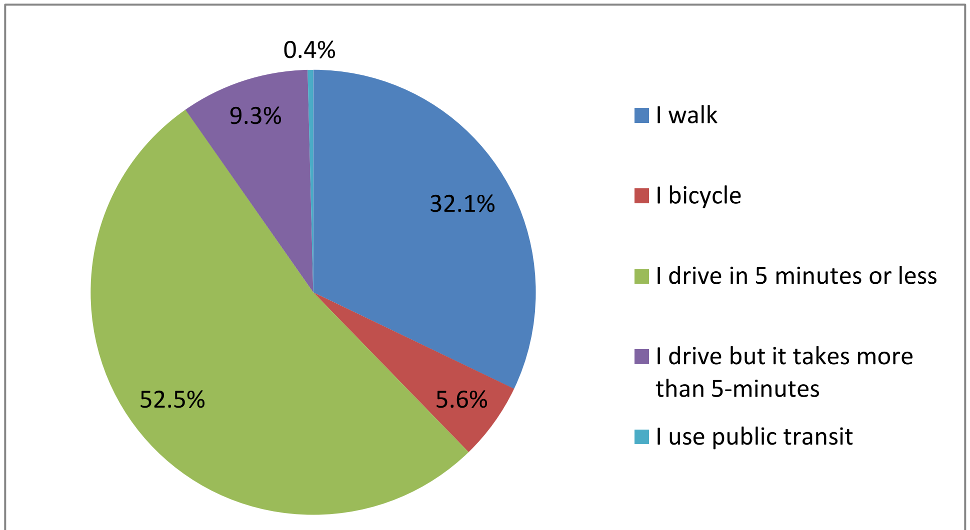

Figure 15: Mode of Access Summary Access

Table 22: Please choose the category that matches your age.

Please choose the category that matches your age.		
Answer Options	**Response Percent**	**Response Count**
Under 20	0.6%	3
20 to 24	1.9%	9
25 to 34	8.4%	39
35 to 44	27.1%	125
45 to 54	29.0%	134
55 to 64	21.4%	99
65 to 74	10.0%	46
75 or older	1.5%	7
	answered question	**462**
	skipped question	**66**

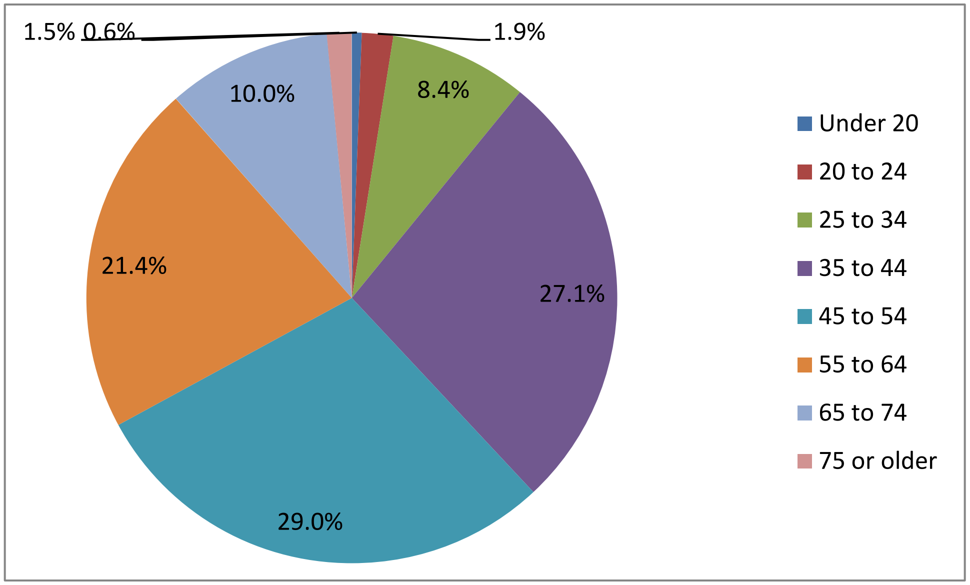

Figure 16: Age Distribution Summary Graphic

Respondent Observations

- With nearly two thirds of the respondents working from home some of the week, there is a greater opportunity for daytime business than traditional employment research suggests
- Families with children dominate the sample
- Since more than 61.8% of respondents drive there is a need to accommodate cars or increase utilization other modes of travel.

Retention and Recruitment Implications for Shorewood

It is important to note that this survey reported what respondents are thinking, not why they are thinking that way, nor should responses be interpreted as direction to action. For example, the relatively high indication that respondents would spend more if a hardware store were brought to Shorewood can be addressed by encouraging an existing store like Sherwin Williams to advertise or expand its hardware selection. The importance of this survey is its ability to benchmark aspects of resident's behavior and satisfaction. By instituting a follow-up program, improvements from action taken as a result of this survey can be documented.

Shorewood Peer Communities

As part of the Shorewood Retail Market Development Plan, five peer communities were identified for assessment. This assessment served two purposes: first, to examine the retail market characteristics of downtowns or commercial districts with similarities to Shorewood, and second, to identify tenant recruitment prospects for Shorewood within those districts. The five peer communities include Cedarburg, Waukesha, and Wauwatosa in the Milwaukee area and the Hilldale and Monroe Street areas in Madison. Either the community's downtown, or for two of the peer communities, the surrounding commercial areas were considered. The following describes the peer community examination process and results.

Methodology

In identifying the five peer communities, demographic data for 10 communities was assembled and reviewed with Village staff, Shorewood BID staff, and the Recruitment Plan Steering Committee. Market demographics, existing retail clusters, their history, their business districts locations, and their likely business recruitment potential were the bases for determining Shorewood's five peer districts. The focus for Shorewood's peer community analysis was linking those retail market attributes with the business mix and defining those businesses potentially suitable for Shorewood.

Once the five communities were determined, the geographical center of each commercial area was used as a center point. For the Milwaukee area communities, the center points were identified by Shorewood BID staff. The center points are:

- Cedarburg (Washington Street and Columbia Road)
- Waukesha (Main Street and Grand Avenue)
- Wauwatosa (76th Street and North Avenue)
- Hilldale in Madison (University Avenue and Midvale Boulevard)
- Monroe Street in Madison (Monroe Street and Grant Avenue)

Using these center points, demographic data for an extended pedestrian market (1 mile) and a convenience drive time market (5 minutes) were reviewed and compared with the same markets for Shorewood, using Capitol Drive and Oakland Avenue as the center point. After considering the demographics of each peer district, each district was visited to assess retail character and business mix. Observations about each peer district were noted, as were the multiple common attributes among them.

Research was then conducted on ground floor retail properties for lease in each of the five peer districts. Properties available for lease on LoopNet and Co-Star were reviewed. The square footage, asking lease rate, property type, and any specific lease requirements were noted for each property. This research was conducted in June 2009 and presented to City staff in July 2009. Shorewood properties for lease were also reviewed as part of this process.

Finally, the peer districts and their leasing issues were considered within the context of the regional retail market. This final step integrated peer district results with the plan's overall implementation, or recruitment, opportunities for the Village, the Shorewood BID, and their stakeholders.

Peer Community Characteristics

The key demographic attributes for Shorewood and the five peer districts are shown below (Tables 24 and 25). Each of the districts and their surrounding geographies display multiple similar characteristics within the two geographies from the center point.

Table 23: 1 Mile Market in Peer Districts

	1 Mile: Shorewood	1 Mile: Waukesha	1 Mile: Wauwatosa	1 Mile: Cedarburg	1 Mile: Madison Monroe St.	1 Mile: Madison-Hilldale
Population	20,774	19,048	22,201	9,565	24,632	11,916
Average Household Size	2.12	2.18	2.21	2.45	2.36	2.02
Total Population Median Age	36.06	32.64	37.81	43.11	23.24	40.24
% Bachelor's Degree	34.13%	20.67%	32.97%	33.42%	31.45%	31.67%
% Graduate or Professional School Degree	28.90%	10.16%	18.54%	13.40%	41.60%	43.46%
Median Household Income	$55,870	$47,696	$64,080	$73,138	$40,065	$51,673
Households w/ Incomes $75,000+	3,525	2,084	4,085	1,882	2,076	1,954
Total Employees	11,759	19,737	6,541	4,664	29,511	17,637
Total Retail Expenditure	$229,653,633	$156,013,815	$229,441,688	$96,449,348	$163,147,987	$149,077,152

Demographic data © 2008 by Experian/Applied Geographic Solutions.

Cedarburg, with its more exurban location, has the smallest employment base and population. The population is also older with higher incomes. Most of the 1-mile markets, with the exception of Cedarburg and Wauwatosa, have significant employment bases nearby. This daytime population typically enhances nearby food and beverage operations' revenues. Income and educational levels are satisfactory in each of the peer markets. Not surprisingly, the two Madison districts display the highest educational attainment levels. Their lower incomes also reflect the nearby student populations. This is most noticeable in the Monroe Street markets, with both the lowest median income and a significantly younger median age. Waukesha's age, income, and educational levels are lower than those of the other communities. This reflects two factors in the 1-mile market--a less affluent population living near downtown and nearby Carroll College students.

Table 24: 5-Minute Drive Time Market in Peer Districts

	5 Minutes Shorewood	5 Minutes Waukesha	5 Minutes Wauwatosa	5 Minutes Cedarburg	5 Minutes Madison-Monroe	5 Minutes Madison-Hilldale
Population	32,440	28,710	34,587	16,036	33,343	24,061
Average Household Size	2.19	2.24	2.20	2.48	2.27	2.10
Total Population Median Age	33.45	34.57	37.55	42.59	24.15	39.78
% Bachelor's Degree	31.94%	20.96%	31.10%	31.58%	32.49%	31.99%
% Graduate or Professional School Degree	26.33%	10.18%	17.58%	13.33%	38.93%	40.46%
Median Household Income	$52,011	$51,706	$62,144	$71,685	$35,954	$56,283
Households w/ Incomes $75,000+	4,960	3,598	6,218	3,047	2,978	4,210
Total Employees	20,056	27,133	15,528	8,360	38,369	38,948
Total Retail Expenditure	$332,152,035	$243,153,502	$352,638,236	$156,751,034	$244,780,607	$292,881,236

Demographic data © 2008 by Experian/Applied Geographic Solutions.

The 5-minute drive times for the peer communities are shown in Table 25 above. With the exception of Cedarburg, the 5-minute markets well exceed the conventionally accepted retail market population size of 25,000 supporting community shopping clusters in suburban geographies. Waukesha's median income and age become more comparable to the other peer communities within this market. Again, with the exception of Cedarburg, daytime employment numbers exceed 15,000 within each of the 5-minute markets, and the two Madison employment numbers are approaching 40,000. Both sets of numbers again indicate that these peer districts have sufficient incomes, density, and spending power to attract a wide range of quality retailers. Given population characteristics, Cedarburg remains the exception in market size, but its market position as a regional tourism destination mitigates many of these issues. Wauwatosa, with the largest population and spending power, and adequate employment base, continues to evolve as a Milwaukee area dining destination.

In addition to demographics, nearby average daily traffic counts reinforce the strong demographic characteristics of Shorewood and its peers. The counts are shown below in Table 26. Counts exceeding 20,000 are generally considered an important retailer site location criteria.

Table 25: Peer Community Traffic Counts

Average Daily Traffic Counts	
Shorewood-Oakland	14,200
Shorewood-Capitol	22,300
Waukesha-Downtown*	6,000
Wauwatosa-Village*	12,800
Cedarburg-Washington Street*	14,900
Madison-Hilldale-University	61,600
Madison-Hilldale-Midvale	21,200
Madison-Monroe	17,600
***Highest count in core.**	

Source: Wisconsin Department of Transportation; Milwaukee County, City of Madison (2006 and 2007); BDI

The strongest counts are in Madison's Hilldale area, with the lowest in downtown Waukesha. The counts on the major thoroughfares near Wauwatosa Village are much stronger than those in the core area. Shorewood's counts are strongest on South Oakland and on Capitol, west of Oakland and increase in those two corridors. Monroe Street's count from northeast to southwest is consistently in the 16,000-18,000 range. Cedarburg, given its more rural location has an acceptable downtown ADT.

Peer Community Observations

In identifying and considering each of Shorewood's five peer communities, six common attributes were identified. These common attributes are followed by specific observations about each peer district.

- Effective use of existing historic buildings. Signature peer district businesses, such as Ristorante Bartolotta in Wauwatosa Village, occupy vintage space in all of the peer districts. Much of downtown Cedarburg is part of a National Register of Historic Places district. Overall, the traditional, vernacular commercial buildings in each peer area are generally in good repair. While the original buildings vary significantly in age and style, effective uses for the ground floor spaces remain, contributing to both character and experience. Interestingly, this attribute also applies to a significant portion of the former Hilldale Mall in Madison that was incorporated into the recent new construction.
- Sympathetic infill development, incorporating parking. Each of the peer districts has experienced recent new developments, primarily higher density, mixed use development. This development has also included parking decks to supplement street parking. (Most of these districts had few vacant sites of sufficient size to support surface parking.) One example is a recent development on Monroe Street, with Trader Joe's as the primary ground floor tenant, parking on lower floors, and residential units on the upper floors.
- Nearby amenities. In addition to providing unique experiences, each district was readily accessible to nearby bike paths, river walks, and other types of open space.

- Vacancies were evident in each of the peer districts. As expected, vacancies and marginal tenancies were observed in all of the downtowns. All of these downtowns also had sites available for in-fill development in or near the center. Like Shorewood, each community will need to be pro-active in working with the local real estate community to identify and recruit suitable tenants.
- Traditional business mix with restaurants most visible. Each of these commercial areas, like Shorewood, has a traditional mix of uses. Service businesses and professional practices, serving the needs of both residents and visitors, were evident in all of the peer districts. Each of the peer districts included a mix of unique retailers, including some format retailers, and food and beverage businesses to attract customers from a wider geography. Local government offices and community institutions were generally not a visible part of the mix in these districts, with the exception of downtown Waukesha with both county offices and a large public library.
- Similar asking ground floor rents. Of all of the peer communities, the two Madison had the highest asking rents, and Waukesha's downtown, the lowest asking rents. Detail about each peer district's real estate data is provided below in the real estate section. In general, asking rents on a triple net basis were $12-16 per square foot (PSF) range.

Despite these strong similarities, certain differences in market approach exist among the districts. Waukesha has the most traditional downtown uses, including the largest office component. Cedarburg uses its history and historic preservation to differentiate itself and promotes its destination appeal to the Milwaukee and Chicago markets. Monroe Street has used its eclectic mix of architecture and businesses to serve Madison's residents versus the student population. Hilldale is new, combining shopping, food, and entertainment, including the unique draw in its Sundance Theaters.

The existence of any formal downtown management program, or organization, varies significantly among the communities. Cedarburg has an active Chamber of Commerce, focused on supporting local tourism. Like Shorewood, Waukesha and Wauwatosa have active BIDs using a comprehensive approach to addressing downtown issues. Monroe Street in Madison has an active merchants association. Hilldale, as a lifestyle center incorporating local retail, is managed by a retail management firm.

On Capitol and on Oakland, Shorewood's challenges include a different character for each of the retail locales on both major streets. Both streets include office and service uses. Shorewood has the opportunity to capitalize on its location and image to focus its recruitment efforts on developing and managing a business mix that serves Shorewood residents, reinforcing its established market position, and enhancing its regional retail competitive position.

Observations: Waukesha

Of all of the Shorewood peer communities, Waukesha's downtown had the most noticeable vacancies. Despite strong way finding, many ground floor locations in downtown Waukesha lack visibility from normal vehicular and pedestrian traffic patterns, resulting in either marginal tenancies or long-standing vacancies in certain locations. This lack of retail connectivity, combined with downtown's low traffic counts, will continue to challenge tenants and owners in those locations.

Waukesha has significant historic buildings representing multiple periods and styles throughout its downtown, in addition to the recent mixed use, infill development. There is some evidence that new development has caused tenants to relocate from other spaces within the district, weakening some blocks.

Hispanic businesses are a notable component of what is an interesting and unique business mix. Many of the strongest retail and restaurant operations are located along Main Street and could potentially serve as a catalyst area for business development on side streets and the remainder of the downtown.

Observations: Wauwatosa

Wauwatosa Village may have the most challenging location of the peer districts. By car, it is difficult to find, to access, and to circulate. Despite these location challenges, Wauwatosa's signature new development in the Village core includes residences, a parking deck, and is fully tenanted, with Noodles & Company as the most prominent tenant. It should be noted that nearby trails provide additional access and amenities. The location, near the Menominee River, and buildings contribute to an interesting pedestrian environment.

Wauwatosa has a diverse food and beverage offering, including some of the Milwaukee area's best restaurants. This dining cluster has developed despite the challenging access. With diverse price points and types of service, Wauwatosa Village's restaurants appeal to an audience beyond its 5-minute drive time market. This cluster also provides important exposure to the rest of the Village's businesses.

Other retailers within the district are also draw from a broader geography. Robertson's Ace Hardware, The Spice House, and Vino 100 combine with the restaurants to create an interesting mix. Most service businesses and major retailers, such as Pick N Save and Walgreens, are located on the Village's periphery. Despite these strong businesses, some vacancies were noted in less visible areas of the district.

Observations: Cedarburg

Cedarburg's reputation as a regional destination is well-documented. However, within the district's overall business mix is a surprising number of service businesses and professional practices, likely serving the needs of area residents versus visitors. Within its retail blocks on Washington Street, Cedarburg has very strong retail on both sides of the street and on side streets in the central blocks, enabling good circulation and visibility among those businesses.

The most obvious element of the retail mix is home-related. The Woolen Mill is a destination among those shops selling a wide range of home accessories from furniture to decorations. Price points are also varied. Consignment stores and custom producers are both part of the mix. In addition to retail, there are restaurants and local B&B's along Washington Street.

Cedarburg also had the most obvious cultural component among its mix. In addition to the Washington Street Historic District, Cedarburg also has an active theater and cultural center. The district has multiple nearby amenities along cedar Creek, including the bike path on the former inter-urban rail and multiple pedestrian bridges.

Observations: Madison-Monroe Street

Monroe Street contains three separate business nodes, each slightly different in character and business mix. These nodes, while separated, are readily accessible to the nearby residential neighborhoods and to places, such as the UW Arboretum. Each of these nodes includes older buildings with recent in-fill development. Of all of the peer districts, Monroe Street had the fewest vacancies and appeared to have the most stable tenancies.

Monroe Street's overall mix includes many of Madison's most well-established independent retailers and restaurants. Many of these businesses draw customers from Madison and Milwaukee. Orange Tree Imports has successfully operated at its location for nearly 40 years. Tileart, a home tile dealer, has a large Milwaukee clientele. The original Pasqual's Mexican Restaurant is located on Monroe Street. Pasqual's has since expanded to three locations, including one in Hilldale, and to include a major catering operation with three additional catering locations in the Madison area.

One new development, in the node with the most businesses, has Trader Joe's as its anchor ground floor tenant. Additional new development occurred near the middle node. This development, including Bluephies restaurant, has experienced minimal tenant turnover, and most of the current tenants have been located there for at least five years.

Observations: Madison-Hilldale

As a retail venue, Hilldale is very different from Shorewood and the other peers. Hilldale is a former shopping mall and was the subject of a major redevelopment proposal. It is located at University Avenue and Midvale Boulevard, two of Madison's high traffic streets. The commercial interior has a 'lifestyle street' design, two parking decks off the new, central street, and new residences (townhomes) lining and facing Midvale. The most vacancies were in the old mall space that has not yet been reconfigured. About 50% of the redevelopment, depending upon the source, was actually constructed before the recent economic crisis. Future project phases will be subject to market and financing changes.

Hilldale provides an interesting peer example for retail tenanting purposes. While national tenants remain from the original mall, including Macy's, new tenants include a 24-hour Sentry grocery store, multiple locally based restaurant and retail tenants, and a large entertainment component. The retail tenant mix includes national retailers. However, the ownership mix is primarily local and marketed that way in center publications. Examples include Playthings, a local toy store, a local Wine Styles owner, and Fair Indigo, a green apparel retailer. Great Dane Brew Pub occupies a brand new restaurant, joining other restaurants, such as Flat Top Grill. The only Sundance Cinema complex outside of Utah is located at Hilldale.

Peer Community Real Estate Characteristics

The asking rents in each of the peer districts were generally similar, but there were some differences within the asking rent range. Shorewood's available retail and restaurant properties on both Capitol and Oakland were generally listed on a triple net basis. The lowest local asking rent was estimated at $12 PSF and was identified as an 'other type of lease.' The remaining Shorewood space for indicated asking rents within a very tight range, $14-16 PSF.

Shorewood's tight asking rent range contrasted with dramatically with those in Waukesha's downtown. In addition to having the largest number of listings on Co-Star, LoopNet, and the BID website, the better retail locations were listed at $12-13 PSF on a triple net basis. Other spaces were listed in the $9-12 range, generally on a modified gross rent basis. Most of the less desirable locations had asking rents listed as 'negotiable.'

Cedarburg's asking rents near the historic core were all $13-16 PSF on a triple net basis, and most asking rents were $16 PSF. The asking rents in Cedarburg for newer lease space at the southern end of Washington Street were $16-22 PSF. Wauwatosa's asking rents were somewhat difficult to quantify, due to a lack of listings (only 2). One listing was $15 PSF on a triple net basis; the second was an asking rent of $10 PSF on a modified gross basis. Asking rents on a triple net basis at Wauwatosa's newer centers, both on major corridors and near Mayfair shopping center, ranged from $18-32 PSF.

The asking rents in the two Madison areas were also similar when compared with each other and slightly higher than those noted for Shorewood. Most of the asking rents in the area immediately surrounding Hilldale were in the $15-20 PSF range. Those asking rents noted for available Hilldale space were in the $18-24 PSF range. The vast proportion of asking rents was quoted on a triple net basis, but there were a few listings using a modified gross rent basis. Monroe Street's asking rents were all in the $18-22 PSF range, and all on a triple net basis.

Peer Community Summary

The attributes and real estate characteristics of these five communities present certain propositions for future retail development in Shorewood's downtown.

1. Asking lease rates in Shorewood are generally comparable or better to those in the peer communities. Rents are not an obstacle for future retail development. As described in the Action Plans, the key emphasis in retail recruitment for Shorewood will be identifying and recruiting businesses with strong operating histories that can succeed in the appropriate location. This will ensure that future tenants are performing at a sustainable level, generating both sufficient revenues and profits for ownership.
2. All of the peer communities likely present future recruitment opportunities for Shorewood. In addition to the retailers and restaurants obtained in the survey results, businesses from the peer communities have been identified as potential recruitment targets for Shorewood. (The complete list is included in with the project survey results and with the Business Opportunity Profiles.) As the Retail Development Plan is implemented, part of the recruitment outreach by Village and BID staff to property owners, targeted retailers, regional retail brokers, and developers will include three key discussion topics--understanding their existing contacts with target businesses or business types, how to

prioritize recruitment activities with those targets, and what represents the best location for success for each recruitment target, both economically and in gaining the optimal co-tenancies.

3. Future recruitment work with Shorewood's developers, commercial/retail brokers, and property owners should promote strong tenancies in leased space on both the Oakland and Capitol corridors. In addition to economically viable new businesses, successful implementation includes strong co-tenancies and anchor businesses within the clusters on both Oakland and Capitol. Though the appropriate business targets may vary by location, owner knowledge and experience remain important. Build-to-suit development by experienced developers with committed ground floor commercial tenants is obviously another element of this recruitment, or plan implementation, work.
4. Given the plan's survey results, initial recruitment efforts can begin with these related businesses and business types identified during the plan process.

Addressing these implications directly will permit the Village to strategically approach the kinds of businesses that can succeed in Shorewood, provide additional shopping and dining options for Shorewood's residents, attract consumers from outside of the community, and strengthen the Village's reputation as a good place for businesses to locate. Most important, this kind of focus will improve local perceptions about the community's retail and dining opportunities, and over time, will reinforce Shorewood's image as a community.

Market Share Analysis

Introduction

Calculating Market Share, the portion of the total available sales won by an individual business or a group of similar businesses reveals how much potential there is to grow the businesses by capturing more of the available sales. Understanding market share by category reveals the relative competitiveness of a community's offering in a business category and allows comparison of offerings in different business categories. For a shopping district, the market share is the total sales of all businesses divided by a logical market's total spending.

Methodology

The calculation of market share is straight forward. If a community's children's apparel sales are $860,000 and the people in the community spend a total of $2,000,000 on children's apparel, then the market share is $860,000/$2,000,000 or 43%. Correctly determining community and store sales and category spending power are key to creating an accurate understanding of market share and developing a strategy for improving capture rates.

Logical Markets

Both the Project Steering Committee and merchants interviewed for this project assisted BDI in establishing logical markets for the stores and restaurants of Shorewood. For the purposes of this analysis, four markets were identified:

- Affiliated Market: Residents of Shorewood who are proud of their community and seek to support the businesses located there
- Custom Market: Interviews with local business owners identified census block groups that contain residents who traditionally supported Shorewood businesses
- Convenience Market: The population living within 5-minutes who can easily travel to Shorewood for their everyday needs
- Destination Market: The population living within 20 minutes who could be attracted to Shorewood for items or dining experiences not available closer to home.

Table 30 reveals key characteristics of these markets and Appendix 4 provides detailed information useful for local businesses to better understand the markets.

Table 26: Logical Market Characteristics

	Shorewood	Custom	5 Minutes	20 Minutes
Population	12,983	53,003	32,375	524,059
Households	6,319	24,527	13,990	210,179
Household Average Income	$78,721	$72,715	$74,149	$53,148
Median Household Income	$59,266	$50,179	$52,173	$41,224
Total Employees	3,819	26,578	20,181	331,441
Total Retail Expenditure	$157,858,699	$577,216,638	$333,758,269	$4,028,829,829

Source: Demographic data © 2008 by Experian/Applied Geographic Solutions.

These maps display the geography covered by this data:

Figure 18: Custom Market

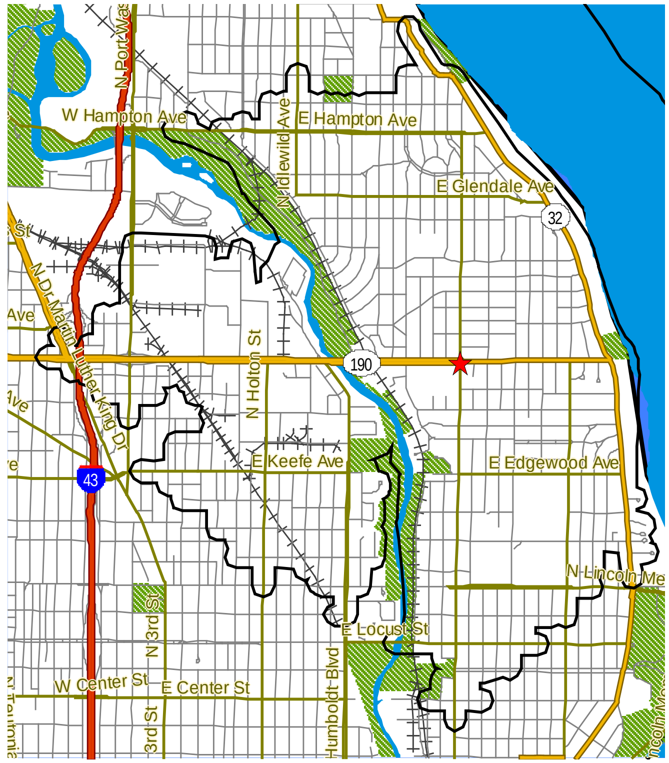

Figure 17: 5-Minute Drive Time

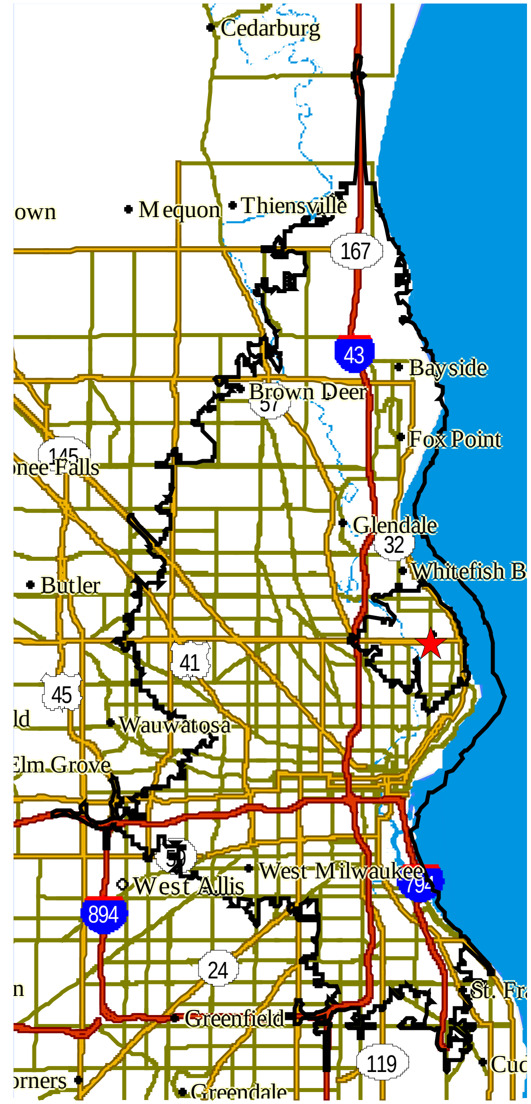

Figure 19: 20 Minute Drive Time

Source: Demographic data © 2008 by Experian/Applied Geographic Solutions.

With retail spending power nearing $600 million in the market identified by local merchants, there are opportunities for existing businesses and new businesses of all types to successfully meet sales per store benchmarks.

Community Sales by Store, and Store Category

With sales in a community comprised of the total sales attained by all businesses in that community, the key to a reliable estimate is determining individual store sales. Because individual store sales are confidential and owners are unlikely to share precise information, store sales must be estimated using the best available data. That data is compiled biannually by the Urban Land Institute to facilitate mall owners and mall stores and restaurants comparing their results to national standards. That compilation is possible because mall store rents are calculated as percentage of sales and consequently, each business reports sales to the mall owner. The mall owners remove identification other than whether the reporting business is a national chain, regional chain, or independent business and forward their data to Urban Land Institute who compiled sales, rent and expense information to create *Dollars & Cents of Shopping Centers 2008*. For multi-owner shopping districts, like Shorewood's, where sales are not reported, ULI's publication offers the best available data. For this project, BDI used the median national sales per square foot multiplied by each business' square footage to create estimates for business sales. Table 22 reveals a sample of the categories and the national benchmarks.

Table 27: Standards for Sales and Rent per Square Foot

Tenant Category	Sample Size	GLA in Square Feet	Sales per Square Foot		Total Rent per Square Foot	
		Median	Top Ten Percent	Median	Top Ten Percent	Median
Bakery	39	712	$868.99	$527.68	$34.15	$20.65
Books	49	15,446	$330.74	$238.71	$23.80	$14.77
Cards and Gifts	60	4,000	$258.75	$151.70	$23.28	$14.00
Coffee & Tea	67	1,451	$1,462.00	$511.00	$61.48	$39.03
Decorative Accessories	13	2,000	$440.68	$206.12	$42.14	$27.62
Dollar Store/Novelties	83	8,048	$203.84	$141.44	$14.50	$9.04
Ice Cream Parlor	51	1,133	$514.00	$334.00	$62.95	$32.30
Jewelry	120	1,410	$1,713.11	$627.84	$112.40	$46.90
Liquor/Wine	50	3,074	$686.66	$396.27	$30.02	$16.11
Restaurant With Liquor	269	5,146	$668.00	$370.00	$36.29	$19.81
Restaurant Without Liquor	107	3,671	$536.00	$289.00	$37.12	$20.08
Women's Specialty	121	3,445	$693.47	$316.76	$49.52	$22.96
The copyright to this spreadsheet is held by ULI--the Urban Land Institute. This spreadsheet may not be posted on the Internet.						

During project interviews knowledgeable business and property owners were asked to comment on whether the top 30% or median sales per square foot generated more accurate estimates for Shorewood. Although the consensus was that the median was the most accurate, it should be noted that in general metropolitan area shopping districts need to perform at a higher level to meet the higher expenses of a metropolitan area location. Appendix 4 lists sales standards for over 80 businesses. The analysis that follows assumes that Shorewood businesses achieve their category's median sales per square foot to estimate sales for each Shorewood business.

Total Available Spending Power

The sales available to any business are limited by the category purchasing power of residents living in its logical market plus additional purchasing power associated with unusual circumstances like a nearby attractions or a concentration of employment. Table 23 uses the Experion national database to report the purchasing power by selected categories and in total for markets that logically might be served by Shorewood businesses.

Table 28: Purchasing Power by Market

Selected Categories	Shorewood	Custom Market	5 Minutes Drive Time	20 Minutes Drive Time
Specialty Food & Grocery Spending Power	$31,010,414	$114,481,474	$65,962,963	$822,665,488
Restaurant Spending Power	$20,723,110	$75,404,345	$43,672,350	$521,250,556
Specialty Apparel Spending Power	$8,252,499	$30,154,464	$17,449,862	$210,037,890
Home Goods Spending Power	$17,542,788	$63,306,314	$36,837,129	$427,396,147
Hair & Nail Care	$3,894,900	$15,900,900	$9,712,500	$157,217,700
Total Retail Expenditure[1]	$157,858,699	$577,216,638	$333,758,269	$4,028,829,829
Source: **Demographic data © 2008 by Experian/Applied Geographic Solutions.**				

The Experion data service relies on its credit division to project total spending by anonymously consolidating information on the purchases made by residents of the area and areas with similar demographic characteristics to estimate a population's purchasing power. Those purchases are made in many communities as residents choose where to buy the goods and services that they need based on their satisfaction with the goods and services offered by different stores. Appendix 3 reports spending potential for more than 70 types of stores, restaurants and services.

Other Considerations

There are varying levels of detail in the categories used by Experion and Urban Land Institute (ULI). ULI offers the most detail. In the analysis that follows, BDI consolidated more detailed ULI data into Experion categories to create comparable data.

[1] Includes categories, like auto dealerships, not currently in Shorewood or ever expected to be in Shorewood.

Community-Wide Market Share Analysis

At a minimum, communities seek to collect at least as much sales tax as their residents pay, a 100% market share capture rate. Table 33 reveals that stores in Shorewood attract only 84.6% of total Shorewood resident spending.

Table 29: Community-Wide Market Shares

	A Estimated Shorewood Business Sales	B Estimated Shorewood Resident Spending Power	C= A/B Shorewood Market Share
Food (Groceries)	$21,984,791	$31,010,414	70.9%
Restaurants	$20,744,798	$20,723,110	100.1%
Apparel & Accessories	$3,674,880	$8,252,499	44.5%
Home	$7,644,520	$17,542,788	43.6%
Other Retail	$31,353,237	$27,324,658	114.7%
Hair & Nail Care	$6,600,096	$3,894,900	169.5%
Total	$92,002,322	$108,748,369	84.6%

Source: ULI, Dollars & Cents of Shopping Centers 2008; Demographic data © 2008 by Experian/Applied Geographic Solutions; BDI.

This table assumes that Shorewood will continue to miss whole categories like auto dealerships, warehouse stores and department stores because, although Shorewood residents spend significant amounts each year in those categories, they cannot be accommodated due to space constraints. Therefore, including the spending associated with those categories in the total spending would negatively distort the results. This report's "Business Opportunity" section provides detail on sub categories.

Custom, Convenience and Destination Markets

This report's logical markets look beyond village boundaries to consider the customer expectations for each category. For example, residents expect to purchase groceries within a quick 5-minute drive of home but will drive a longer distance to buy items like apparel and furniture and want to be able to walk to a coffee shop. Using the logical markets described previously, these logical market shares were calculated.

Table 30: Village Convenience and Destination Market Shares by Category

	A Sales	B Custom	C=A/B Market Share	D 5 Minutes	E=A/D Market Share	F 20 Minutes	G=A/F Market Share
Food	$21,984,791	$114,481,474	19.20%	$65,962,963	33.30%	$822,665,488	2.70%
Restaurants	$20,744,798	$75,404,345	27.50%	$43,672,350	47.50%	$521,250,556	4.00%
Apparel & Accessories	$3,674,880	$30,154,464	12.19%	$17,449,862	21.06%	$210,037,890	1.75%
Home	$7,644,520	$63,306,314	12.10%	$36,837,129	20.80%	$427,396,147	1.80%
Other Retail	$31,353,237	$100,593,392	31.17%	$57,963,366	54.09%	$718,368,528	4.36%
Hair & Nail Care	$6,600,096	$15,900,900	41.51%	$9,712,500	67.95%	$157,217,700	4.20%
Total	$92,002,322	$399,840,889	23.01%	$231,598,170	39.72%	$2,856,936,309	3.22%

Source: ULI, Dollars & Cents of Shopping Centers 2008; Demographic data © 2008 by Experian/Applied Geographic Solutions; BDI.

With the custom market identified by Shorewood store owners as their customer base, these market share capture rates, below 25%, suggest great opportunity for existing stores and new businesses to claim additional sales.

Market Share Summary

Shorewood resident market shares/capture rates more than 100% for other retail included Shorewood's Pharmacies are evidence that Shorewood's commercial areas are satisfying the everyday convenience needs of residents. The slightly lower grocery capture rate validates' local grocery stores' interest in improving and expanding their stores. As other elements of this study uncovered, the lower food market share also identifies an opportunity for additional specialty food stores. Although the 100% capture rate of restaurant spending seems to suggest that resident's should perceive themselves as well served by this category, the pizza and quick delivery business that primarily serves the nearby college market is distorts that category. The lower market share/capture rate for shopping goods like Apparel and Furniture illustrate a weakness in unique specialty businesses typically found in independent business dominated commercial areas or specialty shopping centers. The high capture rate for hair care illustrates how a relatively small spending base and a strong business cluster interact. The business opportunity profiles that follow examine each category in more detail and identify specific business expansion and recruitment opportunities.

Business Opportunity Profiles

If Shorewood is to become the shopping district envisioned by community residents, increase category market shares, and improve the profitability of businesses; it must add sales in existing businesses and attract additional shopping and dining venues. This section defines existing conditions and sets specific market share goals and identifies a business development and recruitment strategy for each category.

Methodology

Using the categories established in the Market Share Analysis, the Business Opportunity Profile sets standards for each category and details the current performance of the Shorewood businesses. With that information it is possible to calculate market share by business type as well as category. The analysis identifies business opportunity profiles that name specific business development policies and recruitment targets likely to improve the vitality of Shorewood's commercial districts. Because numerous opportunities for new development have been identified, there is a special emphasis on tenants that could jump start that development

In 20 years working with downtowns, BDI has observed that the most treasured community commercial areas command a significant share of resident spending power because residents feel an affiliation with their successful commercial area. That affiliation brings a sense of satisfaction that only occurs when residents "shop local," frequently visiting nearby businesses and spend money there. For ease of comparing community commercial areas to the market and contemplating strategies, the strength of the affiliation can be measured by these classifications:

- Regional Draw: a 150% or greater market share indicating that this category draws from a larger geography than the local community.
- Community Serving: a 75% to 149% market share that includes the 100% level illustrating balance between sales and spending power. The range recognizes that the match will be perceived before the balance occurs and continue as regional shoppers begin to access the category.
- Competitive Alternative: a 25% to 74% market share that recognizes that there is a strong regional attraction nearby but that the studied district can be a choice because it is convenient and/or unique.
- Minor Alternative: less than a 25% market share occurs when the overall category is declining or there is a weak location or fit between the use and aspects of the location like parking or inventory storage.

Shorewood's history as a preferred shopping destination for a larger geography than its borders and location adjacent to the University of Wisconsin-Milwaukee have led to identification of a custom market that offers even more opportunity. The profiles that follow recommend strategies for capitalizing on both the Village spending power and custom market spending power.

Existing Conditions Overview

Table 35 below assigns market share classifications to Table 33 previously presented in the Market Share Analysis. Market share is the sales expressed as a percentage of the spending power. Those market shares identified the current competitive classification for each category.

Table 31: Shorewood Sales by Category

	Estimated Shorewood Business Sales	Shorewood Market Share	Shorewood Market Share Classification	Custom Market Share	Custom Market Share Classification
Food (Groceries)	$21,984,791	70.9%	Competitive Alternative	19.20%	Minor Alternative
Restaurants	$20,744,798	100.1%	Community Serving	27.50%	Competitive Alternative
Apparel & Accessories	$8,320,903	44.5%	Competitive Alternative	12.19%	Minor Alternative
Home	$7,644,520	43.6%	Competitive Alternative	12.10%	Minor Alternative
Other Retail[2]	$31,353,237	114.7%	Community Serving	31.17%	Competitive Alternative
Haircare	$6,600,096	169.5%	Regional Attraction	41.51%	Regional Draw
Total	$96,648,345	84.6%	Community Serving	23.01%	
Source: ULI, Dollars & Cents of Shopping Centers 2008; Demographic data © 2008 by Experian/Applied Geographic Solutions; BDI.					

The overall classification of Shorewood as "community serving" is consistent with survey results that show high weekly visits for convenience goods. The business opportunity profiles that follow illustrate a recruitment strategy to grow into a more robust "community serving" classification. That opportunity assumes that the Shorewood businesses would tap into the larger regional market as well as encouraging residents to shop local. Table 32 summarizes the sales and associated market shares by category:

Table 32: Market Share Goals

	Estimated Shorewood Resident Spending Power	Desired Sales	Desired Market Share	Desired Shorewood Market Share Category
Food	$31,010,414	$38,763,018	125%	Community serving
Restaurants	$20,723,110	$31,084,665	150%	Regional Attraction
Apparel & Accessories	$22,961,899	$17,221,424	75%	Community serving
Home	$17,542,788	$17,542,788	100%	Community serving
Other Retail	$27,324,658	$27,324,658	100%	Community serving
Haircare	$3,894,900	$6,600,096	169%	Maintain current position
Total	$123,457,769	$138,536,649	112%	Community serving
Source: ULI, Dollars & Cents of Shopping Centers 2008; Demographic data © 2008 by Experian/Applied Geographic Solutions; BDI.				

[2] Other retail groups Pharmacies, Gas Stations, and businesses fitting multiple categories.

With desired sales nearly $42 million higher than estimated sales, it will be necessary for existing businesses to increase their sales per square foot and for new businesses to join Shorewood's offering. Table 33 summarizes the needed changes:

Table 33: Business Opportunity Profile Summaries

	Estimated Sales	A Desired Sales	B Sales/ SF	C=A/B Supporting SF	D Existing SF	E=C-D Needed SF
Food	$21,984,791	$38,763,018	$500	77,526	45,492	32,034
Restaurants	$20,744,798	$31,084,665	$500	62,169	54,450	7,719
Apparel & Accessories	$3,674,880	$17,221,424	$350	49,204	27,788	21,416
Home	$7,644,520	$17,542,788	$250	70,171	37,381	32,790
Other Retail	$31,353,237	$27,324,658	$500	54,649	48,610	6,039
Haircare	$6,600,096	$6,600,096	existing	32,325	32,325	-
Total	$96,648,345	$138,536,649	$441	346,045	246,046	99,999
					Currently Vacant	10,500
					Office Conversion	10,000
					New Space	79,499

Source: ULI, Dollars & Cents of Shopping Centers 2008; Demographic data © 2008 by Experian/Applied Geographic Solutions; BDI.

It is important to note that although this overall opportunity profile suggests a 43% increase in sales, it recommends adding only 27% more space. The additional volume comes from higher sales per square foot in existing as well as new businesses, filling vacancies, and moving some office uses to upper floors. These changes stress the importance of increasing sales in existing businesses and seeking compatible adjacent businesses that encourage multiple stop shopping that increases impulse sales. There also must be a critical mass of business choices to attract comparison shopping behavior that increases spending. The Action Plan that follows the Downtown Business Opportunity Profiles focuses on strengthening multiple stops and shopping behaviors related to each business category.

Food Business Opportunity Profile

Current Offering

Table 34: Food Business Current Offering

Business Name	A SqFt	Sub-Category	B National Median Sales/ SF	C=A X B Estimated Sales Based On Median
Wick's Beer & Liquor	2,000	Liquor/Wine	$396.27	$792,540
International Food	1,000	Supermarket	$485.75	$485,750
Russian Food and Gifts	1,292	Supermarket	$485.75	$627,589
Nehring's Sendik's on Oakland	12,000	Supermarket	$485.75	$5,829,000
Pick n Save	28,000	Supermarket	$485.75	$13,601,000
Goody Gourmet	1,200	Candy and Nuts	$540.76	$648,912
Total	45,492			$21,984,791

Source: **ULI, Dollars & Cents of Shopping Centers 2008; Village of Shorewood; BDI.**

Spending Power by Sub-Category

Table 35: Food Subcategory Spending Power

	Shorewood	Custom	5 Minutes	20 Minutes
Fruit and Vegetable Markets	$160,479	$595,822	$342,378	$4,354,011
Convenience Stores	$1,246,365	$4,610,663	$2,652,085	$33,268,162
Grocery Stores	$27,557,283	$101,774,347	$58,635,607	$732,934,139
Meat Markets	$343,076	$1,273,247	$731,792	$9,295,206
Liquor Stores	$1,366,976	$4,979,640	$2,883,972	$33,706,160
Other Specialty Food Markets	$254,424	$944,055	$542,612	$6,889,343
Total Spending Power (A)	$31,010,414	$114,481,474	$65,962,963	$822,665,488
Estimated Sales (B)	$21,984,791	$21,984,791	$21,984,791	$21,984,791
Market Share(C=B/A)	70.9%	19.2%	33.3%	2.7%

Source: **Demographic data © 2008 by Experian/Applied Geographic Solutions; BDI.**

Goal: Increase to full neighborhood serving (100%)

- Sales of $22 million grows to $31 million by adding $9 million
- 45,500 SF grows to 62,000 SF by adding 16,500 SF with sales of $500 per SF across category

Recruitment Strategy

- Expansion of Pick 'N Save: 10,000 SF
- Need sales of $1 million+ per business given lower margins
- Existing Space Businesses
  - West Allis Cheese Company
  - Fromagination, Madison
- Redevelopment Businesses
  - Pick 'N Save,
- Either Existing Space or Redevelopment Businesses
  - Breadsmith or Great Harvest
  - Vino 100, Wine Styles, or other local wine seller

Restaurant Business Opportunity Profile

Current Offering

Table 36: Restaurant Business Current Offering

Business Name	A SqFt	Sub-Category	B National Median Sales/ SF	C=A X B Estimated Sales Based On Median
Cafe Nation Smoothie Nation	1,000	Coffee & Tea	$511.00	$511,000
Starbuck's	1,591	Coffee & Tea	$511.00	$813,001
Stone Creek Coffee	2,584	Coffee & Tea	$511.00	$1,320,424
Last Drop Coffee shop	1,200	Coffee & Tea	$511.00	$613,200
Felicci's Mama Mia's pizzeria	1,400	Pizza	$293.00	$410,200
Gianelli's pizza	1,500	Pizza	$293.00	$439,500
Vedo's Pizza	430	Pizza	$293.00	$125,990
Einstein Brothers Bagels	3,000	Sandwich shop	$329.00	$987,000
Culver's	4,478	Hamburger	$473.00	$2,118,094
Baskin-Robbins 31 Flavors	1,800	Ice Cream Parlor	$334.00	$601,200
Baker's Square	3,921	Restaurant no Liquor	$289.00	$1,133,169
Anaba Tea Room	2,500	Restaurant With Liquor	$370.00	$925,000
Benji's Delicatessen & Restaurant	1,800	Restaurant With Liquor	$370.00	$666,000
City Market	4,321	Restaurant With Liquor	$370.00	$1,598,770
East Garden	4,400	Restaurant With Liquor	$370.00	$1,628,000
Harry's Bar & Grill	5,860	Restaurant With Liquor	$370.00	$2,168,200
No. 1 Restaurant	965	Restaurant With Liquor	$370.00	$357,050
North Star American Bistro	3,000	Restaurant With Liquor	$370.00	$1,110,000
Oakcrest Tavern	3,100	Restaurant With Liquor	$370.00	$1,147,000
Village Pub and Grill	2,000	Restaurant With Liquor	$370.00	$740,000
William Ho	3,600	Restaurant With Liquor	$370.00	$1,332,000
	54,450			$20,744,798

Source: **ULI, Dollars & Cents of Shopping Centers 2008; Village of Shorewood; BDI.**

Spending Power by Sub-Category

Table 37: Restaurant Subcategory Spending Power

	Shorewood	Custom	5 Minutes	20 Minutes
Drinking Places	$804,928	$19,715,127	$1,695,130	$2,927,708
Full Service Restaurants	$9,235,616	$232,010,980	$19,461,958	$33,602,206
Limited Service Restaurants	$9,146,818	$230,801,540	$19,278,484	$33,285,849
Special Food Services and Catering	$1,535,748	$38,722,909	$3,236,778	$5,588,582
Total Spending Power (A)	$20,723,110	$521,250,556	$43,672,350	$75,404,345
Estimated Sales (B)	$20,744,798	$20,744,798	$20,744,798	$20,744,798
Market Share(C=B/A)	100.1%	4.0%	47.5%	27.5%

Source**: Demographic data © 2008 by Experian/Applied Geographic Solutions; BDI.**

Goal: Grow to minor regional attraction (150%)

- $20.7million doubles to $31.1 million
- 54,450 SF grows to 62,169 SF by adding 7,719 SF with sales for the entire category increasing to $500 per SF

Recruitment Strategy

- Improve performance of existing businesses
- Need sales of $800,000 to $1 million+ per business due to restaurant sustainability factors
- Existing Space Businesses
  - Le Reve
  - Diablos Rojos concept
  - Beans & Barley
  - Cempazuchi
- Redevelopment Businesses
  - Flat Top Grill
  - Great Dane, Madison (Hilldale)
  - Alterra

Home Oriented Business Opportunity Profile

Current Offering

Table 38: Home Oriented Business Current Offering

Business Name	A SqFt	Sub-Category	B National Median Sales/ SF	C=A X B Estimated Sales Based On Median
Oxford Art Glass Studio	1,500	Arts and Crafts	$132.58	$198,870
The Gilded Edge Lakeshore Gallery	2,000	Arts and Crafts	$132.58	$265,160
Computer Gallery	2,050	Combined Electronics	$324.28	$664,774
Grande Flowers	600	Flowers/Plant Store	$264.55	$158,730
Regency Florist	4,200	Flowers/Plant Store	$264.55	$1,111,110
Sherwin Williams	1,600	Hardware	$144.44	$231,104
Sherwin Williams	8,000	Hardware	$144.44	$1,155,520
Chattel Changers	2,670	Other Retail	$263.15	$702,611
Gloss Photography	950	Other Retail	$263.15	$249,993
Solatube Brighter Concepts	1,277	Other Retail	$263.15	$336,043
Garden Room	5,000	Flowers/Plant Store	$264.55	$1,322,750
Hollywood Video	4,950	Video/CD/DVD Rentals	$165.63	$819,869
Blockbuster Video	2,584	Video/CD/DVD Rentals	$165.63	$427,988
Total	37,381			$7,644,520

Source: **ULI, Dollars & Cents of Shopping Centers 2008; Village of Shorewood; BDI.**

Spending Power by Sub-Category

Table 39: Home Oriented Subcategory Spending Power

	Shorewood	Custom	5 Minutes	20 Minutes
Paint and Wallpaper Stores	$146,953	$532,467	$308,894	$3,623,352
Art Dealers	$11,451	$41,339	$24,096	$275,968
Computer Stores	$1,678,320	$6,062,766	$3,520,959	$41,025,933
Floor Covering Stores	$629,240	$2,238,206	$1,315,394	$14,381,688
Florists	$156,295	$564,939	$328,327	$3,795,440
Furniture Stores	$3,563,904	$12,781,056	$7,460,974	$85,488,989
Hardware Stores	$1,611,417	$5,827,802	$3,387,600	$39,417,538
Home Centers	$3,651,898	$13,218,933	$7,681,481	$90,152,576
Nursery and Garden Stores	$751,715	$2,723,322	$1,580,980	$18,429,145
Other Building Materials Stores	$4,510,422	$16,321,010	$9,485,573	$110,501,076
Other Home Furnishing Stores	$831,173	$2,994,474	$1,742,851	$20,304,442
Total Spending Power (A)	$17,542,788	$63,306,314	$36,837,129	$427,396,147
Estimated Sales (B)	$7,644,520	$7,644,520	$7,644,520	$7,644,520
Market Share(C=B/A)	43.6%	12.1%	20.8%	1.8%

Source: **Demographic data © 2008 by Experian/Applied Geographic Solutions; BDI.**

Goal: Grow to full neighborhood serving

- $7.4 million increases to $17.4 million by adding $10 million
- 37,400 SF grows to 70,200 SF by adding 32,800 SF with sales for the entire category increasing to $250 per SF

Recruitment Strategy

- Improve performance of existing businesses
  - Need sales of $400,000+ per business
  - With consignment inventory, sales would be lower
- Existing Space Businesses
  - Blue Lapin, or French Country Pine, Wauwatosa
- Redevelopment Businesses
  - VIVO, Madison (Hilldale), or Tileart, Madison (Monroe Street)

Apparel Business Opportunity Profile

Current Offering

Table 40: Apparel Business Current Offering

Business Name	A SqFt	Sub-Category	B National Median Sales/ SF	C=A X B Estimated Sales Based On Median
B'tween Friends, etc	1,400	Combined children's wear	$290.13	$406,182
Harleys	4,000	Combined Men's Wear	$252.58	$1,010,320
Another Look	1,000	Other Retail	$263.15	$263,150
Goldi	5,000	Women's Ready to Wear	$262.53	$1,312,650
Luci Boutique	800	Women's Ready to Wear	$262.53	$210,024
Luscious	800	Women's Ready to Wear	$262.53	$210,024
Shop	1,000	Women's Ready to Wear	$262.53	$262,530
	13,894			$3,674,880

Source: **ULI, Dollars & Cents of Shopping Centers 2008; Village of Shorewood; BDI.**

Spending Power by Sub-Category

Table 41: Specialty Apparel Subcategory Spending Power

	Shorewood	Custom	5 Minutes	20 Minutes
Childrens' and Infant's Clothing Stores	$581,603	$2,114,723	$1,231,181	$14,740,153
Men's Clothing Stores	$665,022	$2,422,160	$1,401,821	$16,680,453
Other Apparel Stores	$482,822	$1,761,991	$1,019,468	$12,172,784
Women's Clothing Stores	$1,828,308	$6,665,127	$3,858,320	$45,762,745
Clothing Accessory Stores	$127,893	$464,274	$269,811	$3,135,288
Family Clothing Stores	$3,077,370	$11,216,822	$6,497,455	$77,533,555
Shoe Stores	$1,489,481	$5,509,367	$3,171,806	$40,012,912
Total Spending Power (A) Specialty only	$8,252,499	$30,154,464	$17,449,862	$210,037,890
Estimated Sales (B)	$3,674,880	$3,674,880	$3,674,880	$3,674,880
Market Share(C=B/A)	44.5%	12.2%	21.1%	1.7%

Source: **Demographic data © 2008 by Experian/Applied Geographic Solutions; BDI.**

Table 42: Department Store Spending Power

	Shorewood	Custom	5 Minutes	20 Minutes
Department Stores	$14,709,400	$53,517,106	$31,042,334	$369,359,407
Total Spending Power (A) All Apparel	$22,961,899	$83,671,570	$48,492,196	$579,397,297
Estimated Sales (B)	$3,674,880	$3,674,880	$3,674,880	$3,674,880
Market Share(C=B/A)	16.0%	4.4%	7.6%	0.6%

Source: **Demographic data © 2008 by Experian/Applied Geographic Solutions; BDI.**

Note: The apparel category can be misleading because spending is significantly concentrated in another category, department stores. Successful independent stores are able to attract department store shoppers as well as competing for specialty store sales.

Goal: Grow to competitive alternative including Department Stores

- $8.3 million grows to $12.7 million by adding $4.3 million
- 27,800 SF grows to 36,200 SF by adding 9,400 SF with sales at $350 per SF

Recruitment Strategy

- A “shopping good” so similar businesses are key
- Need sales of $400,000+ per business
- Existing Space Businesses
  - Gaby’s or Aversa, Milwaukee
- Redevelopment Businesses
  - Fair Indigo, Madison (Hilldale)

Other Retail Business Opportunity Profiles

This category captures retail categories that are currently present in Shorewood but are not recruitment opportunities.

Current Offering

Table 43: Other Retail Businesses Current Offering

Business Name	A SqFt	Sub-Category	B National Median Sales/ SF	C=A X B Estimated Sales Based On Median
Family Pharmacy	1,500	Drugstore/Pharmacy	$429.07	$643,605
Hayek's Pharmacy	4,046	Drugstore/Pharmacy	$429.07	$1,736,017
Thomson's Serv-U Pharmacy	3,200	Drugstore/Pharmacy	$429.07	$1,373,024
Walgreens Drug Store	14,500	Drugstore/Pharmacy	$429.07	$6,221,515
				$9,974,161
BP Gas station	3,000	Service Station	$1,321.30	$3,963,900
Citgo Gas station	250	Service Station	$1,321.30	$330,325
Lakeside Mobil	4450	Service Station	$1,321.30	$5,879,785
Mobil service station	2,700	Service Station	$1,321.30	$3,567,510
Shorewood Auto Repair	2,450	Service Station	$1,321.30	$3,237,185
				$16,978,705
Sprint	1,200	Telephone Store/Telecom Store	$220.46	$264,552
The UPS Store	1,906	Mailing/Packaging	$234.60	$447,148
Gloss Photography	950	Other Retail	$263.15	$249,993
House Of Engraving	800	Other Retail	$263.15	$210,520
Shorewood Coin Shop	1000	Other Retail	$263.15	$263,150
Oakland AveNews		Other Retail	$263.15	$236,835
Mike Crivello's Camera	2,970	Other Retail	$263.15	$781,556
	45,822			$2,189,201
EYEZ Boutique	1,000	Eyeglasses—Optician	$310.85	$310,850
Stein Optical	5,394	Eyeglasses—Optician	$310.85	$1,676,725
				$1,987,575
Northshore Wheels	2,000	Combined Sporting	$237.00	$474,000
Rainbow Jersey	3,300	Combined Sporting	$237.00	$782,100
				$1,256,100
C C Conrad Jewelers	1,000	Combined Jewelry	$627.84	$627,840
Mixa Jewelers	1,200	Combined Jewelry	$627.84	$753,408
Source: ULI, Dollars & Cents of Shopping Centers 2008; Village of Shorewood; BDI.				

Spending Power by Sub-Category

Table 44: Other Retail Businesses Spending Power

	Shorewood	Custom	5 Minutes	20 Minutes
Pharmacy and Drug Stores	$4,298,252	$15,756,576	$9,095,304	$110,650,254
Estimated Sales	$9,974,161	$9,974,161	$9,974,161	$9,974,161
Market Share	232.1%	63.3%	109.7%	9.0%
Gasoline Stations with Convenience Stores	$14,152,575	$52,151,414	$30,037,157	$374,449,511
Gasoline Stations without Convenience Stores	$6,781,697	$25,027,130	$14,404,072	$180,737,231
Spending Power	$20,934,272	$77,178,544	$44,441,229	$555,186,742
Estimated Sales	$16,978,705	$16,978,705	$16,978,705	$16,978,705
Market Share	81.1%	22.0%	38.2%	3.1%
Jewelry Stores	$1,006,644	$3,625,081	$2,120,963	$23,694,439
Estimated Sales	$1,381,248	$1,381,248	$1,381,248	$1,381,248
Market Share	137%	38%	65%	6%
Optical Goods Stores	$817,681	$3,051,108	$1,738,673	$21,943,809
Estimated Sales	$1,987,575	$1,987,575	$1,987,575	$1,987,575
Market Share	243%	65%	114%	9%
Source: **Demographic data © 2008 by Experian/Applied Geographic Solutions; BDI.**				

Goal: Remain neighborhood serving

- $29.4 million declines to $28.3 million due to loss of gas station
- 45,800 SF grows to 56,600 SF by adding 10,800 SF with sales for the entire category becoming $500 per SF (Gas Stations are $1,300/sf)

Recruitment Strategy

- Improve performance of existing businesses
  - Need sales of $400,000+ per business

New Retail Business Category Opportunity Profiles

Analysis associated with survey results and peer communities suggests that there may be opportunities for sporting goods, art/teaching supplies, a book store, and a hardware store.

Spending Power by Sub-Category

Table 45: New Retail Businesses Spending Power

	Shorewood	Custom	5 Minutes	20 Minutes
Book Stores	$1,154,901	$4,169,378	$2,432,039	$27,815,906
Hardware Stores	$1,611,417	$5,827,802	$3,387,600	$39,417,538
Sporting Goods Stores	$1,684,519	$6,138,788	$3,562,452	$42,768,319

Source**: Demographic data © 2008 by Experian/Applied Geographic Solutions; BDI.**

Goal: Become a competitive alternative for each subcategory

- Encourage existing businesses to add these categories
- Support community based, cooperative bookstore

Recruitment Strategy

- Existing Space Businesses
  - Learning Shop
  - Burghardt's Sporting Goods
  - Co-op Bookstore
- Redevelopment Businesses
  - Utrecht
  - Blick Supplies

Hair & Nail Salon Business Opportunity Profile

These businesses are important fashion co-tenants so it is desirable to maintain a strong presence as fashion apparel strengthens.

Current Offering

Table 46: Hair & Nail Salon Business Current Offering

Business Name	A SqFt	Sub-Category	B National Median Sales/ SF	C=A X B Estimated Sales Based On Median
Nick's Barber	438	Men's Barber	$179.97	$78,737
Joe's North Shore Barbershop	1,000	Men's Barber	$179.97	$179,970
The Men's Room	2,880	Men's Barber	$179.97	$518,314
North Shore Nails	970	Nail Salon	$158.34	$153,590
Sunseekers	4,950	Other Services	$168.51	$834,125
Headmasters hair salon	600	Unisex Hair	$190.80	$114,480
Supercuts	2,000	Unisex Hair	$190.80	$381,600
Scenario	2,200	Women's Hair Salon	$222.67	$489,874
Actaea Works Ltd.	2,000	Women's Hair Salon	$222.67	$445,340
Bella's Hair Salon	438	Women's Hair Salon	$222.67	$97,418
Beauty salon	1,200	Women's Hair Salon	$222.67	$267,204
Ultra Violette/Hair Salon	500	Women's Hair Salon	$222.67	$111,335
Arlines Beauty	1,000	Women's Hair Salon	$222.67	$222,670
Alex's Salon & Beauty Supply	1,500	Women's Hair Salon	$222.67	$334,005
Robert Laurence Hair Studio Inc	3,000	Women's Hair Salon	$222.67	$668,010
Oakland Glow hair design	1,000	Women's Hair Salon	$222.67	$222,670
Salon Divine	1,250	Women's Hair Salon	$222.67	$278,338
(Brian Houston)	2,000	Women's Hair Salon	$222.67	$445,340
The Establishment-Aveda	1,400	Women's Hair Salon	$222.67	$311,738
Creative Concepts Hair Design	2,000	Women's Hair Salon	$222.67	$445,340
	32,325			$6,600,096

Source: **ULI, Dollars & Cents of Shopping Centers 2008; Village of Shorewood; BDI.**

Spending Power

Table 47: Nail & Hair Salon Spending Power

	Shorewood	Custom	5 Minutes	20 Minutes
Total Spending Power (A)	$3,894,900	$15,900,900	$9,712,500	$157,217,700
Estimated Sales (B)	$6,600,096	$6,600,096	$6,600,096	$6,600,096
Market Share(C=B/A)	169.5%	41.5%	68.0%	4.2%

Source: **Demographic data © 2008 by Experian/Applied Geographic Solutions; BDI.**

Goal: Maintain current sales level

- $6.6 million

Recruitment Strategy

- Encourage succession from owner to employee
- Encourage product sales in addition to services
- Keep list of interested owners

Commercial SWOT Analysis

In formulating this Retail Market Development Plan for Shorewood's commercial nodes, it is important to understand the area's key strengths, weaknesses, opportunities and threats, or "SWOT," specific to retail recruitment opportunities. These factors contributed to Shorewood's current situation. These same factors will remain, as new businesses are recruited, and any new development occurs. This analysis highlights those elements forming the basis for value and positioning statements to assist in recruiting businesses to Shorewood.

Strengths

Strengths are assets that will most likely continue and remain a key building block for attracting successful businesses to Shorewood.

- ***Established Shorewood businesses*** provide the ideal "co-tenants" for other unique businesses with operating experience. By clustering, these businesses can share customers who make a special trip to find unusual merchandise or dining options
- Shorewood's government has made a ***strong commitment to Shorewood's retail success.*** The Village has made important improvements to local infrastructure. Tax Increment Financing is in place and continues to be used to enable retail development. In cooperation with the Shorewood BID, local officials recognize the need for additional focus on local recruitment efforts to better serve the Shorewood community and attract consumers and investors to Shorewood
- One additional component of Shorewood's commitment to its future success is the implementation of the Village's ***Master Plan***
- Shorewood's ***vintage buildings from the 1920s*** reinforce the community's image as a unique place and unique commercial environment
- Shorewood's ***population with strong spending power***, within a five-minute drive time, offers a customer base that will permit prospective businesses locating in the community to succeed
- Buildings in Shorewood offer ***available and affordable lease space*** for current and prospective retail and restaurant tenants
- ***Shorewood's marketing program***, produced by the Village, the Shorewood BID, the Shorewood school system and other local institutions, serves to increase regional awareness of Shorewood's opportunities for future residents and businesses
- ***Shorewood's reputation*** is regional as a desirable place to live and work and as a potential business location
- Shorewood's location is ***close to two of Milwaukee area's largest employers***, Columbia-St. Mary's Medical Center and University of Wisconsin-Milwaukee
- Shorewood's two major thoroughfares provide ***high visibility for businesses located on both Capitol and Oakland*** and that level of visibility is an important retail site attribute for businesses targeted for recruitment
- In addition, the Shorewood community actively promotes ***biking and walking*** to its commercial districts to increase overall traffic and visibility.

Weaknesses

Weaknesses are characteristics that can limit business success but which will most likely remain and must be "worked around."

- Shorewood has commercial clusters located throughout on both Capitol and Oakland. ***These unconnected clusters*** complicate the ability of business owners to capitalize on the overall Shorewood retail offering and the ability to establish strong co-tenancies.
- As with most established communities and commercial corridors, Shorewood's ***properties have multiple owners.*** Most owners understand that their building operating decisions, including tenanting, have a significant impact on 's business success.

Opportunities

These opportunities form the basis for the Retail Market Development Plan by capitalizing on positive trends or local attributes that can become strengths if properly developed.

- The Shorewood BID and the Village should foster ***cluster identity programming***. This type of programming can enable Shorewood' diverse business clusters to develop an identity through advertising and marketing efforts that works to their mutual benefit
- The Village should continue its work to enable ***build-to-suit development*** on key sites. This type of development creates space built to serve the operating needs of a specific tenant or specific types of tenants. Key will be a committed tenant in advance of development
- Shorewood should undertake programming designed to ***improve the sustainability and profitability of existing businesses*** to enhance the chances that those businesses will succeed and bring stability to 's business mix
- Working in tandem, the Village, the Shorewood BID, engaged property owners, and Shorewood's retail brokers can work together to market available lease space to prospective tenants. This ***joint marketing to prospective tenants*** can improve ***ongoing communication*** and develop strong tenancies throughout the Village over time
- Shorewood's ***current businesses can expand, or supplement, their product lines*** based upon the results of this Plan. These additional products can be publicized to new and existing customers
- Shorewood's greatest opportunity may be a ***business recruitment program that emphasizes high quality retail and restaurant recruitment***. These quality businesses represent sustainable business propositions, and these business owners understand, respond to, and serve their customers.
- In recruiting ***economically sustainable businesses***, experienced business owners will understand that revenues will need to exceed $500,000 annually and that the business must be sufficiently profitable to support reinvestment in the business and generate a meaningful return to the owners.

Threats

Threats are market conditions that currently undermine the success of Shorewood's property and business owners. If not addressed, these conditions will limit the Village's ability to capitalize on the many opportunities.

- Virtually all of Shorewood's commercial clusters are concentrated on high traffic corridors. While important for business visibility, ***pedestrian traffic safety*** in these locations will need ongoing consideration
- Restaurants are one of the key business opportunities for Shorewood. Some of the Village's existing ***buildings may not be suitable for the installation of a commercial kitchen***, the necessary ventilation, and other local code-mandated requirements needed to operate a successful restaurant
- As new development is proposed, ***signed commitments from commercial tenants*** should be critical to the evaluation of any proposal and the consideration of any incentives. The strength and terms of lender financing commitments based upon tenancies should also be part of the proposal evaluation. Vacant ground floor lease space in a completed new development diminishes market confidence in the location
- Although Shorewood's commercial property is affordable, that ***affordability actually limits potential tenant build-out*** because investors question whether build-out costs that exceed the value of building are a wise investment. Build-out costs, such as a restaurant kitchen, are high for the strong tenants identified as desirable in the survey and peer community analysis
- ***Shorewood's broader competitive market is becoming stronger***. Bayshore, after its recent expansion, has a strong collection of national and regional tenants. Downer Avenue has an expanding roster of tenants that appeal to nearby Shorewood residents. Shorewood residents continue to patronize other retail and dining districts throughout the Milwaukee area. Many of these areas offer increased competition based upon their unique business mix
- When some ***business owners are operating short of best practices***, it undermines the overall image of Shorewood retail and restaurant offering and can weaken sales at all businesses. Shorewood's businesses cannot simply 'get by.' Overall improvements to Shorewood's business clusters will require the commitment of astute business operators focused on profitability and ongoing reinvestment in their businesses.

Value Platform

The analysis of Shorewood's commercial area's Strengths, Weaknesses, Opportunities, and Threats suggests these statements, the Recruitment Value Platform, should be used to attract new businesses:

1. Shorewood offers a well sized commercial cluster where new businesses share customers with established community serving businesses
2. Vintage spaces and new spaces in a variety of sizes offer space suitable for nearly any specialty retail or restaurant business
3. Shorewood property and business owners have the opportunity to achieve above market returns on investment by meeting national norms for sales per square foot.
4. Shorewood's nearby population supports businesses of all types.
5. Strong government support stabilizes investment in Shorewood stores and restaurants
6. Shorewood's customers experience the pleasure of a very walkable shopping district.

Appendix

Stores Listed						
Abercrombie & Fitch	Canvasbacks	Factory Card Outlet	House of Threads	Michael's	Re-tique, 3rd Ward	The Spice House
Aldo Shoes	Carter's	Fair Trade	Ikea	Millingers	REI	TJ Maxx
Amazon.com	Cavalry Games	Family Music Center	InStep,	Milwaukee PC	Ritz Camera	Trader Joe's
American Eagle	Chico's Outlet	Farm and Fleet	3rd Ward	Minor's Garden Center	Riverwest Co-op	Urban Outfitters
Apple Store	Children's Place	Farmer's Markets	J. Jill	Molloy's Women's Clothing	Rodiez Running Store, West Allis	Utrecht
Athletes Foot	Chu Hai Market	Fitzgeralds Pharmacy, WFB	janie and jack	Monches Farm,	Ruhama's Yarn, WFB	Valero
Avenue Liquor	Claire's	Fontana Sports, Madison	Jeff's Sporting Goods	Ace Hardware,	Sears	Viet Hoa Market
Aversa	Clark Graphics	Forever 21	JoAnn Fabrics	Nearly New Family Fashions	Sendik's,	Vino 100, 3rd Ward
B&G Golf	Closet Classics	Future Green, BayView	Jos A Bank	Neroli Salon & Spa	Sephora	Wagner's Garden Mart
Babies R Us	Country Gift Store	Gallery 505	Just Kidding, WFB	Nine West	Shady Acres Nursery	Wal-Mart
Bahr Farm	Crankdaddy's Bicycle	Gap	Kellner Greenhouses	Nordstrom	SHOO	Walgreens
Banana Republic	Crate & Barrel	Gap Kids	Kinkos	Office Depot	Shopko	Walters Swim Supply
Bayside Garden Center/Florist	Creative Pals, Brookfield	Garden Room, Shorewood	Laacke & Joys Outdoor Store	Office Max	Soaps & Scents	West Allis Cheese
Best Buy	delia's	Giraffe Ltd.	Les Moise Sporting Goods	Patagonia	Sound Investments	Wheel & Sprocket
Betty Johnson Interiors	Detour	Goo Goo Ga Ga, Brookfield	Limited Too	Patched Works, Elm Grove	Sports Authority	Wild Birds
Big Lot's	Dick's Sporting Goods	Grand Avenue Mall Farmer's Stand	LL Bean	Peabody's Interiors	St. Paul Fish Co.	Wild Flour Bakery
Biggsby's, Elm Grove	Downer Wine Store	Great Harvest Bread	Lowes	Pick N Save	Stan's Fit for Your Feet	Williams-Sonoma
Bloomingdales	Dunham's	Growing Power	Ma Jolie, Downer Avenue	Plant Land	Stefan's Soccer	Wine Cellar of Wisconsin
Board Game Barrister, Bayshore	East Towne Resale	Gymboree	Macy's	Pottery Barn	Stemper's Religious Goods Store	Winkie's
Boston Store	Eddie Bauer	Half Price Books	MAM Store	Public Market	Stride Rite	Wisconsin Cheese
Brass Bell Music	Elements East Asian Furnishings, WFB	Hancock Fabrics	Marshalls	Radio Shack	Talbots	Wisconsin Garden and Pet
Breadsmith	El Rey Mexican Market	Hobby Lobby	McNabb & Risely Furniture, Thiensville	Ray's Wine & Spirits	The Learning Shop	Woodman's
Burghardt's	Express	Hounds about Town, WFB	Menard's			

5 Guys	Chancery, multi-location, WI	Izumi's	Old Spaghetti Factory	Souplantation
Abu's	Charcoal Grill, New Berlin	Jack Pandl's Whitefish Bay	Olive Garden	St Paul's Fish Co.
AJ Bombers	Cheesecake Factory	Jack's Café, Waukesha	Original Pancake House	Steffano
Albanese's	Chez Jacques	Japanica	Outpost Café	Stephano's
Aliota's	Chick-fil-A	Jose's Blue Sombrero	Over Easy, Chicago	Sugar Maple
Amaranth Bakery	Chili's	Juniper 61	Palms Bistro,	Sweet Tomatoes
Antigua Latin Restaurant	Chin's Asia Fresh	Kil@Wat	Palomino	Swig
Apollo, Brady Street	Chocolate Factory	Kopps	Pasta Tree	Taco Bell
Applebee's	Cileto Lindo Mexican	La Brioche, Madison	PF Chang's	Taste of India
Arby's	Comet Café	La Dolce Vita	Philly Way	Tenuta's
Balistreri's (both locations)	Conejito's	La Fuente	Pitch's	Tess
Balzac Wine Bar	Coquette Café	La Merenda, Walker's Point	Pitch's Miss Katie's Diner	TGIFridays
Bar Louie	Cosi	La Perla	Points East Pub	Thai Garden
Barclay Gallery & Garden Café	County Clare Irish Inn	Lakefront Brewery	Ponderosa	Thai Kitchen
Bayou	Cousins	Le Reve, Wauwatosa	Potbelly's	The Anchorage
BD's Mongolian Barbeque	Culver's	Legal Seafood, East Coast	Quartino's, Chicago	The Capital Grille
Bella's Fat Cat	Dairy Queen	Long John Silver's	RAM, Schaumburg, IL	The Knick
Benji's	Dream Dance	Ma Fischer's	Red Lobster	The Wicked Hop
Black Rose Irish Pub	EE Sane Thai	Macaroni Grill	Red Robin	Third Street Pier
Bonefish Grill	Elsa's	Mama Mia's	Rio West Cantina	Third Ward Caffe
Bosley on Brady	Emperor Of China	Marchese's Olive Pit	Riptide Seafood	TLC Soup
Botanas	Family Table	Maxfields Pancakehouse	Riverwest Co-op Cafe	Tomaso's Pizza
Bravo	Ferch's Malt Shoppe	Maxie's Southern Comfort	Riviera Maya	Tres Hermanos Club
Buca di Beppo	Filippo's Italian Restaurant	Mayura	Roots Restaurant & Cellar	Trocadero (Diablos Rojas/Hollander)
Buckley's Kiskeam Inn	Forum II Family Restaurant	Mayura	Rudy's Mexican	Tulip, 3rd Ward
Buffalo Wild Wing	Garage	McCormick and Schmick's	Rustico Pizzeria	Twisted Fork
Cafe 1505, Mequon	George Webb	McDonald's	Saki Tume	Umami Moto
Café Brucke	Gil's Café	Meritage	Sala da Pranzo	Upper Crust Pizza
Cafe Centraal (Diablos Rojas/Hollander)	Gingerbread House, Muskego	Meze Lounge	Sammy's Hot Dogs	Vino 100

Cafe Lulu	Great Dane Pub, Madison	Milwaukee Ale House	Samurai Japanese	Water Buffalo
Cafe Manna, Brookfield	Habanero's Mexican Kitchen,	Mimma's Café	Sanford	Water Street Brewery
Cafe Osher	Harry's Bar & Grill	Mitchell's Fish Market, Brookfield	Saz's	Wicked Hop
Calderone Club	Hector's A Mexican Restaurant	Mo's Irish Pub, Wauwatosa	Sciortino's Bakery	Yokoso
Capitol Café, Brookfield	Hinterland, multi-location WI	Nanakusa	Senor Sol, West Allis	Zaffiro's
Capone's Grotto	Hong Thai	Nessun Dorma Riverwest	Sepia, Chicago	Zarletti
Carini's La Conca D'Oro	Hooligan's Super Bar	Nick N Willy's Take-n-Bake	Shah Jee	Zoup (multi-location),
Carnevor	Hotel Metro	Nomad World Pub	Shahrazad	
Casablanca	IHOP	North Shore Bistro	Shiraz, e	
Cempazuchi	Il Mito, multi-location Milwaukee	North Star American Bistro	Silver Spring House	
Centennial Bar & Grille	Indulge	Oakland Gyros	Sonic Burger	
Centro Cafe		Oakland Trattoria	Soup Brothers	

Classification	Median Size	Top 10% Sales/SF	Top 30% Sales/SF	50% Sales/SF	Top 10% Rent/Sf	Median Rent/Sf
Dollar Store/Novelties	8,048	$203.84	$172.64	$141.44	$14.50	$9.04
Health Food	1,470	$619.00	$449.00	$279.00	$49.20	$23.11
Supermarket	52,376	$687.60	$586.68	$485.75	$14.77	$7.90
Candy And Nuts	816	$1,120.24	$830.50	$540.76	$123.17	$68.57
Restaurant Without Liquor	3,671	$536.00	$412.50	$289.00	$37.12	$20.08
Restaurant With Liquor	5,146	$668.00	$519.00	$370.00	$36.29	$19.81
Ice Cream Parlor	1,133	$514.00	$424.00	$334.00	$62.95	$32.30
Sandwich Shop	1,458	$626.00	$477.50	$329.00	$42.61	$22.84
Hamburger	2,629	$687.00	$580.00	$473.00	$46.83	$26.07
Pizza	1,690	$621.00	$457.00	$293.00	$41.11	$18.39
Coffee & Tea	1,451	$1,462.00	$986.50	$511.00	$61.48	$39.03
Drinks/Juice/Lemonade	1,393	$453.24	$389.68	$326.11	$50.03	$27.47
Chinese Fast Food	1,978	$640.81	$432.03	$223.25	$31.56	$16.90
Mexican Fast Food	2,359	$599.65	$488.67	$377.68	$47.21	$27.00
Other Fast Food	1,774	$658.00	$550.50	$443.00	$87.14	$38.41
Women's Specialty	3,445.31	$693.47	$505.12	$316.76	$49.52	$22.96
Women's Ready To Wear	4,124.26	$647.33	$454.93	$262.53	$42.18	$21.66
Children's Wear	3,421.88	$515.71	$402.92	$290.13	$44.37	$28.09
Men's Wear	4,307.49	$499.21	$375.90	$252.58	$36.33	$20.69
Mixed Apparel	5,771.60	$574.14	$450.86	$327.58	$44.85	$23.16
Family Shoes	3,220.43	$385.34	$299.90	$214.45	$36.45	$19.96
Women's Shoes	1,792	$543.47	$443.91	$344.34	$51.10	$35.68
Athletic Footwear	3,510	$574.80	$484.32	$393.83	$54.82	$28.05
Furniture	7,696	$350.31	$253.36	$156.40	$29.97	$15.75
Home Accessories	9,770.32	$432.62	$337.77	$242.91	$29.66	$17.25
Beds/Mattresses	4,058	$346.46	$301.17	$255.87	$30.82	$23.75
Electronics	2,600.00	$490.55	$407.42	$324.28	$33.93	$17.54
Automotive (TB&A)	6,944	$247.81	$210.36	$172.90	$19.00	$9.01
Service Station	3,175		$1,321.30	$1,321.30	$78.98	$15.40

Classification	Median Size	Top 10% Sales/SF	Top 30% Sales/SF	50% Sales/SF	Top 10% Rent/Sf	Median Rent/Sf
Sporting	5,723.86	$328.32	$282.66	$237.00	$26.18	$14.44
Toys	4,034		$194.92	$194.92	$26.00	$16.25
Arts And Crafts	20,341	$256.14	$194.36	$132.58	$19.13	$11.25
Game Store	1,515.24	$499.25	$492.79	$486.32	$39.07	$23.71
Cars And Gifts	3,914.66	$381.25	$274.17	$167.09	$35.86	$15.16
Books	15,446.29	$330.74	$284.73	$238.71	$23.80	$14.77
Decorative Accessories	2,000	$440.68	$323.40	$206.12	$42.14	$27.62
Jewelry	1,410.13	$1,713.11	$1,170.48	$627.84	$112.40	$46.90
Liquor/Wine	3,074	$686.66	$541.47	$396.27	$30.02	$16.11
Drugstore/Pharmacy	10,990	$811.97	$620.52	$429.07	$18.81	$11.99
Pet Shop	9,000	$334.43	$269.59	$204.75	$23.86	$16.17
Flowers/Plant Store	1,628	$314.26	$289.41	$264.55	$36.00	$20.42
Telephone	1,478.74	$750.30	$514.07	$277.83	$117.86	$36.21
Telephone Store/Telecom Store	1,810	$497.52	$358.99	$220.46	$44.26	$21.89
Eyeglasses	2,202.14	$739.28	$526.72	$314.15	$47.45	$21.65
Eyeglasses—Optician (See Also Y-01)	1,473	$915.82	$638.09	$360.35	$47.18	$22.71
Cosmetics/Beauty Supplies/Body Care	1,600	$538.81	$418.21	$297.60	$32.22	$17.00
Office Supplies	23,587		$202.35	$202.35	$16.73	$11.75
Other Retail	2,176.64	$608.11	$435.63	$263.15	$46.04	$19.12
Women's Hair Salon	1,549.05	$367.43	$295.05	$222.67	$28.28	$19.55
Men's Barber	1,000		$179.97	$179.97	$24.76	$16.78
Dry Cleaner	1,500	$359.31	$254.32	$149.33	$40.93	$22.80
Unisex Hair	1,356.43	$436.98	$313.89	$190.80	$34.22	$21.66
Nail Salon	1,199.76	$342.64	$250.49	$158.34	$33.64	$19.84
Video/Cd/Dvd Rentals	5,100		$165.63	$165.63	$28.79	$18.33
Mailing/Packaging	1,400	$464.29	$349.45	$234.60	$35.02	$20.52
Picture Framing	1,600		$237.30	$237.30	$29.52	$20.80
Day Spa	2,541	$617.62	$464.24	$310.85	$37.30	$20.00
Other Services	1,359	$300.75	$234.63	$168.51	$28.63	$16.84
Bakery	712	868.99	$698.34	$527.68	34.15	20.65
Hardware	12,000		$144.44	$144.44		

	Shorewood	Custom	5 Minutes	20 Minutes
Aggregate Household Dollars 2008				
Appliances and Electronics Stores	$2,859,174	$10,422,107	$6,032,592	$72,232,140
Art Dealers	$11,451	$41,339	$24,096	$275,968
Auto Parts and Accessories	$1,662,099	$6,103,612	$3,515,788	$43,337,874
Book Stores	$1,154,901	$4,169,378	$2,432,039	$27,815,906
Camera and Photography Stores	$267,809	$982,083	$567,197	$6,893,284
Childrens' and Infant's Clothing Stores	$581,603	$2,114,723	$1,231,181	$14,740,153
Clothing Accessory Stores	$127,893	$464,274	$269,811	$3,135,288
Computer Stores	$1,678,320	$6,062,766	$3,520,959	$41,025,933
Convenience Stores	$1,246,365	$4,610,663	$2,652,085	$33,268,162
Costmetics and Beauty Stores	$180,758	$661,584	$382,034	$4,626,706
Department Stores	$14,709,400	$53,517,106	$31,042,334	$369,359,407
Drinking Places	$804,928	$2,927,708	$1,695,130	$19,715,127
Family Clothing Stores	$3,077,370	$11,216,822	$6,497,455	$77,533,555
Fish and Seafood Markets	$81,811	$303,700	$174,517	$2,218,467
Floor Covering Stores	$629,240	$2,238,206	$1,315,394	$14,381,688
Florists	$156,295	$564,939	$328,327	$3,795,440
Fruit and Vegetable Markets	$160,479	$595,822	$342,378	$4,354,011
Fuel Dealers	$1,243,156	$4,571,586	$2,634,669	$32,821,274
Full Service Restaurants	$9,235,616	$33,602,206	$19,461,958	$232,010,980
Furniture Stores	$3,563,904	$12,781,056	$7,460,974	$85,488,989
Gasoline Stations with Convenience Stores	$14,152,575	$52,151,414	$30,037,157	$374,449,511
Gasoline Stations without Convenience Stores	$6,781,697	$25,027,130	$14,404,072	$180,737,231
Gift and Souvenir Stores	$373,330	$1,353,878	$786,960	$9,261,627
Grocery Stores	$27,557,283	$101,774,347	$58,635,607	$732,934,139
Hardware Stores	$1,611,417	$5,827,802	$3,387,600	$39,417,538
Hobby, Toy, and Game Stores	$818,651	$2,989,545	$1,730,476	$20,876,902
Home Centers	$3,651,898	$13,218,933	$7,681,481	$90,152,576
Hotels and Other Travel Accomodations	$1,363,365	$4,960,896	$2,873,086	$34,188,572
Jewelry Stores	$1,006,644	$3,625,081	$2,120,963	$23,694,439
Limited Service Restaurants	$9,146,818	$33,285,849	$19,278,484	$230,801,540
Liquor Stores	$1,366,976	$4,979,640	$2,883,972	$33,706,160

	Shorewood	Custom	5 Minutes	20 Minutes
Luggage Stores	$49,156	$177,672	$103,300	$1,207,340
Mail Order and Catalog Stores	$4,610,278	$16,752,115	$9,712,040	$114,977,371
Meat Markets	$343,076	$1,273,247	$731,792	$9,295,206
Men's Clothing Stores	$665,022	$2,422,160	$1,401,821	$16,680,453
Mobile Home Dealers	$4,644	$16,786	$9,773	$113,743
Motorcycle and Boat Dealers	$1,427,412	$5,198,849	$3,014,087	$36,179,287
Musical Instrument Stores	$313,942	$1,152,018	$664,282	$8,119,799
New Car Dealers	$30,955,960	$112,977,808	$65,230,021	$789,368,511
Nursery and Garden Stores	$751,715	$2,723,322	$1,580,980	$18,429,145
Office and Stationary Stores	$406,224	$1,463,530	$851,806	$9,848,256
Optical Goods Stores	$817,681	$3,051,108	$1,738,673	$21,943,809
Other Apparel Stores	$482,822	$1,761,991	$1,019,468	$12,172,784
Other Building Materials Stores	$4,510,422	$16,321,010	$9,485,573	$110,501,076
Other Direct Selling Establishments	$838,191	$3,063,915	$1,773,196	$21,433,842
Other General Merchandise Stores	$1,699,875	$6,186,042	$3,588,747	$42,751,934
Other Health and Personal Care Stores	$359,745	$1,321,169	$761,984	$9,331,215
Other Home Furnishing Stores	$831,173	$2,994,474	$1,742,851	$20,304,442
Other Miscellaneous Retail Stores	$348,670	$1,286,970	$741,118	$9,241,912
Other Specialty Food Markets	$254,424	$944,055	$542,612	$6,889,343
Outdoor Power Equipment Stores	$94,789	$342,595	$199,108	$2,298,915
Paint and Wallpaper Stores	$146,953	$532,467	$308,894	$3,623,352
Pet and Pet Supply Stores	$494,991	$1,813,891	$1,048,159	$12,747,253
Pharmacy and Drug Stores	$4,298,252	$15,756,576	$9,095,304	$110,650,254
RV Parks	$16,806	$61,619	$35,580	$434,582
Record, Tape, and CD Stores	$602,950	$2,212,097	$1,275,681	$15,586,250
Recreational Vehicle Dealers	$41,996	$153,803	$88,763	$1,084,718
Rooming and Boarding Houses	$9,420	$34,256	$19,842	$237,403
Sewing and Needlecraft Stores	$145,758	$525,843	$306,395	$3,554,049
Shoe Stores	$1,489,481	$5,509,367	$3,171,806	$40,012,912
Special Food Services and Catering	$1,535,748	$5,588,582	$3,236,778	$38,722,909
Sporting Goods Stores	$1,684,519	$6,138,788	$3,562,452	$42,768,319
Tire Dealers	$753,578	$2,767,449	$1,593,979	$19,655,763
Used Merchandise Stores	$325,236	$1,178,993	$685,308	$8,047,062
User Car Dealers	$2,157,321	$7,869,898	$4,544,671	$54,919,676

	Shorewood	Custom	5 Minutes	20 Minutes
Vending Machines	$520,439	$1,925,267	$1,107,755	$13,942,239
Warehouse Superstores	$5,521,107	$20,303,348	$11,721,294	$144,547,225
Women's Clothing Stores	$1,828,308	$6,665,127	$3,858,320	$45,762,745
Total Aggregate Annual Retail Sales	$182,601,303	$667,614,402	$385,954,989	$4,676,635,679
Hair Care	$1,095,608	$4,005,686	$2,315,730	$28,059,814
	$183,696,911	$671,620,088	$388,270,719	$4,704,695,493
Demographic data © 2008 by Experian/Applied Geographic Solutions.				

	0.5 Miles: E Kensington Blvd & N Oakland Ave	1 Miles: E Kensington Blvd & N Oakland Ave	5 Minutes E Kensington Blvd & N Oakland Ave	0.5 Miles: E Menlo Blvd & N Oakland Ave	1 Miles: E Menlo Blvd & N Oakland Ave	5 Minutes E Menlo Blvd & N Oakland Ave
2009 Demographics						
Total Population	6,619	18,012	25,915	10,044	27,682	35,188
Total Households	2,521	7,288	10,455	3,661	10,722	14,133
Female Population	3,439	9,504	13,520	5,418	14,479	18,144
% Female	52.00%	52.80%	52.20%	54.00%	52.30%	51.60%
Male Population	3,180	8,508	12,396	4,626	13,203	17,043
% Male	48.10%	47.20%	47.80%	46.10%	47.70%	48.40%
Population Density (per Sq. Mi.)	8,428.10	5,733.50	7,481.80	12,788.30	8,811.40	8,714.60
Age:						
Age 0 - 4	6.10%	5.70%	5.90%	4.30%	5.00%	4.90%
Age 5 - 14	14.30%	12.70%	12.30%	8.20%	9.30%	9.10%
Age 15 - 19	6.00%	5.80%	5.80%	11.30%	9.70%	9.00%
Age 20 - 24	4.00%	5.00%	6.50%	13.30%	13.90%	15.00%
Age 25 - 34	12.60%	12.90%	13.20%	13.40%	14.30%	15.40%
Age 35 - 44	15.60%	15.00%	14.80%	11.40%	12.30%	12.20%
Age 45 - 54	19.80%	18.30%	18.30%	14.20%	15.20%	15.10%
Age 55 - 64	12.10%	12.10%	11.90%	10.50%	10.50%	10.10%
Age 65 - 74	4.80%	6.30%	5.50%	6.30%	4.80%	4.60%
Age 75 - 84	3.10%	4.30%	3.90%	4.70%	3.30%	3.10%
Age 85 +	1.50%	2.10%	1.90%	2.50%	1.70%	1.60%
Median Age	40.1	40.6	39.6	34.6	33.3	32.5
Housing Units						
Total Housing Units	2,775	8,013	11,559	4,051	11,956	15,682
Owner Occupied Housing Units	59.50%	52.60%	52.70%	36.10%	40.90%	40.10%
Renter Occupied Housing Units	31.30%	38.40%	37.70%	54.30%	48.80%	50.10%
Vacant Housing Units	9.20%	9.00%	9.60%	9.60%	10.30%	9.90%

	0.5 Miles: E Kensington Blvd & N Oakland Ave	1 Miles: E Kensington Blvd & N Oakland Ave	5 Minutes E Kensington Blvd & N Oakland Ave	0.5 Miles: E Menlo Blvd & N Oakland Ave	1 Miles: E Menlo Blvd & N Oakland Ave	5 Minutes E Menlo Blvd & N Oakland Ave
Race and Ethnicity						
American Indian, Eskimo, Aleut	0.20%	0.30%	0.30%	0.50%	0.50%	0.40%
Asian	2.00%	2.70%	2.90%	3.40%	2.70%	2.90%
Black	7.70%	8.60%	9.60%	10.20%	11.40%	10.40%
Hawaiian/Pacific Islander	0.10%	0.10%	0.10%	0.10%	0.10%	0.10%
White	85.00%	82.90%	81.80%	79.90%	78.30%	79.90%
Other	1.60%	1.40%	1.60%	1.70%	2.90%	2.40%
Multi-Race	3.40%	4.00%	3.80%	4.30%	4.20%	4.00%
Hispanic Ethnicity	3.90%	4.10%	4.20%	4.70%	6.60%	5.40%
Not of Hispanic Ethnicity	96.10%	95.90%	95.80%	95.30%	93.40%	94.60%
Marital Status:						
Age 15 + Population	5,266	14,699	21,203	8,799	23,759	30,317
Divorced	9.30%	9.60%	9.30%	8.20%	9.00%	8.50%
Never Married	27.60%	30.00%	31.70%	45.30%	46.70%	47.70%
Now Married	56.00%	51.90%	51.20%	35.00%	35.80%	35.60%
Separated	2.10%	3.10%	2.90%	6.50%	4.60%	4.20%
Widowed	5.10%	5.60%	5.00%	5.00%	4.00%	4.00%
Educational Attainment:						
Total Population Age 25+	4,607	12,761	18,010	6,324	17,214	21,879
Grade K - 8	0.30%	0.80%	0.80%	1.50%	1.40%	1.10%
Grade 9 - 12	1.60%	2.20%	2.30%	3.20%	3.40%	3.00%
High School Graduate	11.60%	12.50%	12.90%	15.40%	14.70%	13.10%
Associates Degree	5.80%	6.20%	6.00%	6.00%	6.30%	5.90%
Bachelor's Degree	36.00%	35.90%	35.20%	31.20%	31.50%	33.70%
Graduate Degree	33.50%	30.00%	29.50%	28.00%	28.10%	29.40%
Some College, No Degree	11.20%	12.40%	13.40%	14.70%	14.60%	13.90%
Household Income:						

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Income $ 0 - $9,999	3.10%	5.60%	4.70%	10.10%	7.90%	7.20%
Income $ 10,000 - $14,999	1.90%	3.20%	3.00%	5.90%	4.50%	4.20%
Income $ 15,000 - $24,999	5.20%	7.50%	8.10%	12.40%	11.20%	10.50%
Income $ 25,000 - $34,999	6.70%	8.20%	8.30%	9.50%	10.00%	10.10%
Income $ 35,000 - $49,999	14.00%	13.60%	13.80%	15.30%	15.60%	16.40%
Income $ 50,000 - $74,999	15.80%	16.10%	17.10%	16.90%	17.30%	17.10%
Income $ 75,000 - $99,999	14.20%	13.10%	13.10%	11.30%	10.80%	10.80%
Income $100,000 - $124,999	10.30%	9.60%	9.50%	7.70%	8.00%	7.70%
Income $125,000 - $149,999	6.30%	5.80%	5.90%	3.40%	4.00%	4.40%
Income $150,000 +	22.50%	17.30%	16.60%	7.40%	10.80%	11.70%
Average Household Income	$112,386	$91,046	$94,132	$65,002	$72,411	$76,773
Median Household Income	$80,576	$67,402	$66,404	$46,337	$50,892	$51,720
Per Capita Income	$43,205	$36,905	$38,001	$29,235	$29,692	$31,782
Vehicles Available:						
0 Vehicles Available	5.50%	9.60%	8.60%	16.70%	12.30%	11.40%
1 Vehicle Available	39.00%	41.30%	41.90%	46.20%	43.70%	44.90%
2+ Vehicles Available	55.50%	49.10%	49.50%	37.10%	43.90%	43.70%
Average Vehicles Per Household	1.7	1.6	1.6	1.3	1.5	1.6
Total Vehicles Available	4,344	11,391	16,544	4,788	16,605	22,086
Business and Employment:						
Number of Employees	1,590	5,232	12,204	5,173	12,987	17,129
Number of Establishments	225	549	927	343	795	1,108
2014 Demographics						
Total Population	7,493	20,360	29,409	11,263	31,135	39,623
Total Households	2,338	6,765	9,745	3,429	9,995	13,158
Female Population	3,879	10,701	15,278	6,051	16,207	20,339
% Female	51.80%	52.60%	52.00%	53.70%	52.10%	51.30%

	0.5 Miles: E Kensington Blvd & N Oakland Ave	1 Miles: E Kensington Blvd & N Oakland Ave	5 Minutes E Kensington Blvd & N Oakland Ave	0.5 Miles: E Menlo Blvd & N Oakland Ave	1 Miles: E Menlo Blvd & N Oakland Ave	5 Minutes E Menlo Blvd & N Oakland Ave
Male Population	3,615	9,659	14,130	5,212	14,928	19,284
% Male	48.20%	47.40%	48.10%	46.30%	48.00%	48.70%
Age:						
Age 0 - 4	5.50%	5.20%	5.40%	3.80%	4.50%	4.40%
Age 5 - 14	14.40%	12.90%	12.50%	8.40%	9.40%	9.30%
Age 15 - 19	5.80%	5.60%	5.60%	10.50%	9.20%	8.50%
Age 20 - 24	4.30%	5.30%	6.80%	13.20%	13.90%	14.90%
Age 25 - 34	12.50%	12.70%	13.10%	13.40%	14.20%	15.30%
Age 35 - 44	14.30%	13.70%	13.50%	10.60%	11.40%	11.30%
Age 45 - 54	18.90%	17.40%	17.40%	13.70%	14.70%	14.50%
Age 55 - 64	13.70%	13.60%	13.40%	11.90%	11.90%	11.50%
Age 65 - 74	6.30%	7.90%	7.00%	7.90%	6.20%	5.90%
Age 75 - 84	3.00%	4.00%	3.70%	4.40%	3.20%	3.00%
Age 85 +	1.40%	1.80%	1.70%	2.20%	1.60%	1.50%
Median Age	40.9	41.5	40.4	35.6	34	33.1
Housing Units Trend						
Total Housing Units	2,756	7,969	11,546	4,065	11,949	15,648
Owner Occupied Housing Units	56.10%	49.60%	49.70%	34.50%	38.80%	38.10%
Renter Occupied Housing Units	28.70%	35.30%	34.70%	49.90%	44.90%	46.00%
Vacant Housing Units	15.20%	15.10%	15.60%	15.60%	16.40%	15.90%
Race and Ethnicity						
American Indian, Eskimo, Aleut	0.30%	0.30%	0.30%	0.40%	0.40%	0.40%
Asian	1.20%	1.50%	1.60%	1.90%	1.50%	1.60%
Black	9.60%	10.40%	11.10%	11.80%	12.60%	11.80%
Hawaiian/Pacific Islander	0.10%	0.10%	0.10%	0.10%	0.10%	0.10%
White	84.30%	83.10%	82.20%	81.10%	79.40%	80.70%
Other	1.40%	1.20%	1.40%	1.40%	2.50%	2.00%

	0.5 Miles: E Kensington Blvd & N Oakland Ave	1 Miles: E Kensington Blvd & N Oakland Ave	5 Minutes E Kensington Blvd & N Oakland Ave	0.5 Miles: E Menlo Blvd & N Oakland Ave	1 Miles: E Menlo Blvd & N Oakland Ave	5 Minutes E Menlo Blvd & N Oakland Ave
Multi-Race	3.10%	3.40%	3.30%	3.40%	3.50%	3.40%
Hispanic Ethnicity	4.40%	4.50%	4.60%	5.20%	7.10%	5.90%
Not of Hispanic Ethnicity	95.60%	95.50%	95.40%	94.80%	92.90%	94.10%
Marital Status:						
Age 15 + Population	5,997	16,689	24,176	9,895	26,831	34,245
Divorced	9.30%	9.60%	9.30%	8.30%	9.10%	8.60%
Never Married	27.40%	29.90%	31.60%	45.10%	46.60%	47.60%
Now Married	56.20%	52.00%	51.20%	35.30%	35.90%	35.80%
Separated	2.10%	3.00%	2.80%	6.40%	4.50%	4.10%
Widowed	5.00%	5.50%	5.00%	5.00%	4.00%	4.00%
Educational Attainment:						
Total Population Age 25+	5,242	14,484	20,534	7,215	19,645	24,967
Grade K - 9	0.30%	0.60%	0.50%	1.10%	1.00%	0.80%
Grade 9 - 12	1.60%	2.20%	2.20%	3.00%	3.30%	2.90%
High School Graduate	12.00%	13.10%	13.50%	16.00%	15.30%	13.70%
Associates Degree	6.10%	6.60%	6.30%	6.40%	6.70%	6.20%
Bachelor's Degree	33.90%	33.80%	33.10%	29.50%	29.70%	31.80%
Graduate Degree	34.40%	30.90%	30.30%	28.70%	28.80%	30.20%
Some College, No Degree	11.70%	13.00%	14.00%	15.40%	15.40%	14.60%
Household Income:						
Income $ 0 - $9,999	2.90%	5.20%	4.30%	9.30%	7.30%	6.70%
Income $ 10,000 - $14,999	1.70%	3.00%	2.80%	5.60%	4.20%	3.90%
Income $ 15,000 - $24,999	4.60%	6.60%	7.00%	11.70%	10.10%	9.40%
Income $ 25,000 - $34,999	6.10%	7.70%	7.90%	8.80%	9.70%	9.70%
Income $ 35,000 - $49,999	11.90%	12.40%	12.40%	14.20%	13.80%	14.60%
Income $ 50,000 - $74,999	16.10%	16.30%	17.50%	17.80%	18.50%	18.20%
Income $ 75,000 - $99,999	13.40%	12.50%	12.60%	11.10%	10.70%	10.70%
Income $100,000 - $124,999	10.90%	10.30%	10.10%	8.70%	8.70%	8.30%

	0.5 Miles: E Kensington Blvd & N Oakland Ave	1 Miles: E Kensington Blvd & N Oakland Ave	5 Minutes E Kensington Blvd & N Oakland Ave	0.5 Miles: E Menlo Blvd & N Oakland Ave	1 Miles: E Menlo Blvd & N Oakland Ave	5 Minutes E Menlo Blvd & N Oakland Ave
Income $125,000 - $149,999	7.10%	6.40%	6.50%	4.30%	4.70%	5.00%
Income $150,000 +	25.30%	19.70%	18.90%	8.70%	12.30%	13.40%
Average Household Income	$120,829	$98,148	$100,772	$69,194	$77,571	$82,253
Median Household Income	$87,701	$72,851	$71,762	$50,572	$54,787	$55,715
Per Capita Income	$38,050	$32,665	$33,427	$26,024	$26,363	$28,153
Vehicles Available						
0 Vehicles Available	5.50%	9.70%	8.60%	16.60%	12.30%	11.40%
1 Vehicle Available	38.90%	41.20%	41.80%	46.10%	43.70%	44.90%
2+ Vehicles Available	55.60%	49.20%	49.60%	37.30%	44.00%	43.70%
Average Vehicles Per Household	1.6	1.5	1.5	1.2	1.4	1.4
Total Vehicles Available	4,043	10,607	15,463	4,488	15,408	20,463
2000 Census Demographics						
Total Population	6,346	17,157	24,455	9,319	26,083	33,181
Total Households	2,717	7,803	11,085	3,826	11,376	15,010
Female Population	3,332	9,142	12,880	5,075	13,775	17,280
% Female	52.50%	53.30%	52.70%	54.50%	52.80%	52.10%
Male Population	3,014	8,016	11,574	4,244	12,308	15,902
% Male	47.50%	46.70%	47.30%	45.50%	47.20%	47.90%
Age:						
Age 0 - 4	6.00%	5.50%	5.70%	3.60%	4.40%	4.30%
Age 5 - 14	15.20%	13.30%	12.90%	7.80%	9.10%	8.90%
Age 15 - 19	6.10%	5.80%	5.80%	12.10%	10.10%	9.20%
Age 20 - 24	4.30%	5.50%	7.20%	15.10%	15.80%	17.00%
Age 25 - 34	15.20%	15.40%	15.90%	15.90%	17.00%	18.40%
Age 35 - 44	17.10%	16.40%	16.10%	11.90%	13.00%	12.90%
Age 45 - 54	17.80%	16.30%	16.30%	12.10%	13.20%	13.00%
Age 55 - 64	8.20%	8.10%	8.00%	6.90%	6.90%	6.60%

	0.5 Miles: E Kensington Blvd & N Oakland Ave	1 Miles: E Kensington Blvd & N Oakland Ave	5 Minutes E Kensington Blvd & N Oakland Ave	0.5 Miles: E Menlo Blvd & N Oakland Ave	1 Miles: E Menlo Blvd & N Oakland Ave	5 Minutes E Menlo Blvd & N Oakland Ave
Age 65 - 74	5.20%	6.80%	6.00%	6.80%	5.10%	4.80%
Age 75 - 84	3.60%	5.00%	4.60%	5.50%	3.80%	3.50%
Age 85 +	1.30%	1.80%	1.60%	2.20%	1.50%	1.40%
Median Age	37.2	37.9	36.7	31.5	30.7	30
Housing Units Trend						
Total Housing Units	2,786	7,992	11,420	3,945	11,822	15,521
Owner Occupied Housing Units	61.50%	53.80%	54.10%	34.90%	40.70%	39.70%
Renter Occupied Housing Units	36.10%	43.90%	43.00%	62.10%	55.50%	57.00%
Vacant Housing Units	2.50%	2.40%	2.90%	3.00%	3.80%	3.30%
Race and Ethnicity						
American Indian	0.10%	0.20%	0.20%	0.40%	0.50%	0.40%
Asian	2.10%	3.00%	3.30%	4.10%	3.10%	3.40%
Black	1.30%	2.60%	3.80%	4.80%	6.40%	4.90%
White	94.50%	91.80%	90.30%	87.80%	86.20%	88.00%
Other	0.70%	0.70%	0.70%	0.80%	1.70%	1.30%
Two or More Races	1.30%	1.70%	1.60%	2.10%	2.20%	2.00%
Hispanic Ethnicity	2.20%	2.30%	2.40%	2.80%	4.40%	3.40%
Not of Hispanic Ethnicity	97.80%	97.70%	97.60%	97.20%	95.60%	96.60%
Marital Status:						
Age 15 + Population	5,002	13,924	19,904	8,253	22,547	28,803
Divorced	9.40%	9.60%	9.40%	8.20%	9.00%	8.50%
Never Married	27.80%	30.10%	31.70%	45.50%	46.80%	48.00%
Now Married	55.60%	51.60%	50.90%	34.60%	35.50%	35.20%
Separated	2.10%	3.10%	2.90%	6.70%	4.60%	4.20%
Widowed	5.20%	5.60%	5.10%	5.00%	4.10%	4.00%

	0.5 Miles: E Kensington Blvd & N Oakland Ave	1 Miles: E Kensington Blvd & N Oakland Ave	5 Minutes E Kensington Blvd & N Oakland Ave	0.5 Miles: E Menlo Blvd & N Oakland Ave	1 Miles: E Menlo Blvd & N Oakland Ave	5 Minutes E Menlo Blvd & N Oakland Ave
Educational Attainment:						
Total Population Age 25+	4,344	11,995	16,728	5,718	15,784	20,097
Grade K - 9	0.40%	0.90%	0.80%	1.80%	1.60%	1.30%
Grade 9 - 11, No diploma	2.30%	3.10%	3.20%	4.50%	4.90%	4.20%
High School Graduate	10.50%	11.10%	11.50%	13.70%	13.00%	11.50%
Associates Degree	5.10%	5.50%	5.20%	5.30%	5.50%	5.10%
Bachelor's Degree	37.50%	37.30%	36.60%	32.30%	32.50%	34.80%
Graduate Degree	31.30%	27.90%	27.40%	25.40%	25.70%	27.10%
Some College, No Degree	12.80%	14.00%	15.10%	16.40%	16.40%	15.60%
No Schooling Completed	0.10%	0.20%	0.20%	0.50%	0.40%	0.40%
Public School Enrollment	80.40%	81.90%	80.80%	85.30%	84.30%	83.50%
Private School Enrollment	19.60%	18.10%	19.30%	14.70%	15.70%	16.50%
Household Income:						
Income $ 0 - $9,999	3.80%	6.90%	5.80%	12.70%	9.60%	8.80%
Income $ 10,000 - $14,999	3.10%	4.60%	4.50%	8.30%	6.10%	5.80%
Income $ 15,000 - $24,999	7.50%	9.60%	10.20%	13.10%	13.80%	13.40%
Income $ 25,000 - $34,999	10.70%	11.70%	11.50%	13.40%	12.60%	13.40%
Income $ 35,000 - $49,999	14.10%	14.30%	15.50%	15.90%	16.90%	17.00%
Income $ 50,000 - $74,999	19.90%	18.40%	18.70%	16.60%	16.40%	16.30%
Income $ 75,000 - $99,999	12.80%	12.00%	11.90%	9.90%	10.20%	9.70%
Income $100,000 - $124,999	7.80%	7.20%	7.20%	3.90%	4.70%	5.30%
Income $125,000 - $149,999	5.90%	5.50%	4.80%	2.00%	3.20%	3.10%
Income $150,000 - $199,999	4.40%	3.60%	3.80%	1.60%	2.30%	2.60%
Income $200,000 or More	9.90%	6.20%	6.10%	2.70%	4.30%	4.60%
Average Household Income	$91,243	$75,067	$75,598	$51,640	$61,285	$62,886
Median Household Income	$63,495	$53,661	$53,087	$37,130	$41,093	$41,586
Per Capita Income	$39,072	$34,138	$34,269	$21,202	$26,728	$28,448

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Vehicles Available						
0 Vehicles Available	5.80%	10.40%	9.20%	18.70%	13.30%	12.20%
1 Vehicle Available	40.60%	42.50%	43.10%	46.90%	44.50%	45.90%
2 Vehicles Available	42.30%	38.10%	38.70%	28.30%	33.50%	33.20%
3+ Vehicles Available	11.30%	8.90%	9.00%	6.20%	8.70%	8.70%
Average Vehicles Per Household	1.6	1.4	1.5	1.2	1.3	1.4
Total Vehicles Available	4,429	11,527	16,574	4,686	15,926	21,153
Blue Collar Occupations	437	1,377	2,119	1,216	3,596	4,531
White Collar Occupations	3,151	8,206	11,620	4,046	11,772	15,616
% Blue Collar Workers	12.20%	14.40%	15.40%	23.10%	23.40%	22.50%
% White Collar Workers	87.80%	85.60%	84.60%	76.90%	76.60%	77.50%
1990 Demographics						
Total Population	6,550	17,570	25,102	9,502	27,323	34,860
Total Households	2,739	7,843	11,138	3,849	11,488	15,100
Female Population	3,536	9,681	13,620	5,296	14,690	18,532
% Female	54.00%	55.10%	54.30%	55.70%	53.80%	53.20%
Male Population	3,014	7,889	11,482	4,206	12,633	16,328
% Male	46.00%	44.90%	45.70%	44.30%	46.20%	46.80%
Age:						
Total Population	6,550	17,570	25,102	9,502	27,323	34,860
Age 0 - 4	7.10%	6.50%	6.60%	4.60%	5.50%	5.20%
Age 5 - 14	12.90%	11.70%	11.40%	7.20%	9.00%	8.50%
Age 15 - 19	5.10%	5.00%	4.90%	10.20%	8.40%	7.80%
Age 20 - 24	4.90%	5.60%	7.00%	14.50%	14.00%	15.20%
Age 25 - 34	18.10%	18.00%	18.70%	19.10%	20.40%	21.60%
Age 35 - 44	20.30%	18.50%	18.20%	13.70%	15.60%	15.70%
Age 45 - 54	11.20%	10.20%	10.30%	7.50%	8.10%	8.10%

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Age 55 - 64	8.00%	8.00%	7.90%	6.10%	6.00%	5.90%
Age 65 - 74	6.40%	8.10%	7.50%	7.60%	6.30%	5.80%
Age 75 - 84	4.60%	6.30%	5.70%	6.80%	4.90%	4.50%
Age 85 +	1.50%	2.20%	1.90%	2.60%	1.90%	1.70%
Median Age	35.9	36.7	35.7	31.8	31.1	30.6
Housing Units						
Total Housing Units	2,794	8,012	11,433	3,950	11,810	15,498
Owner Occupied Housing Units	61.30%	53.50%	53.70%	34.40%	41.30%	40.10%
Renter Occupied Housing Units	36.70%	44.30%	43.70%	63.00%	56.00%	57.30%
Vacant Housing Units	1.90%	2.10%	2.60%	2.60%	2.70%	2.60%
Race and Ethnicity						
American Indian, Eskimo, Aleut	0.10%	0.20%	0.20%	0.30%	0.40%	0.40%
Asian	1.20%	1.60%	1.90%	2.60%	2.60%	3.10%
Black	1.00%	1.60%	2.20%	3.30%	5.00%	4.10%
White	97.40%	96.20%	95.20%	93.40%	90.60%	91.60%
Other	0.30%	0.40%	0.40%	0.50%	1.40%	0.80%
Hispanic Ethnicity	1.60%	1.50%	1.50%	1.70%	3.00%	2.20%
Not of Hispanic Ethnicity	98.40%	98.50%	98.50%	98.30%	97.00%	97.80%
Educational Attainment:						
Total Population Age 25+	4,587	12,531	17,600	6,035	17,257	22,086
Grade K - 9	1.20%	2.70%	2.50%	4.60%	4.20%	3.60%
Grade 9 - 12	2.00%	4.60%	4.10%	7.50%	6.10%	4.90%
High School Graduate	12.30%	13.90%	13.50%	13.50%	15.70%	14.40%
Associates Degree	6.00%	5.10%	5.50%	4.00%	5.00%	5.70%
Bachelor's Degree	31.60%	30.90%	31.30%	28.60%	28.50%	29.60%
Graduate Degree	28.10%	24.60%	23.90%	22.60%	21.50%	23.00%

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Some College, No Degree	18.70%	18.10%	19.20%	19.10%	19.00%	18.90%
1990 Household Income:						
Income $ 0 - $9,999	5.00%	11.00%	8.40%	18.40%	14.50%	12.60%
Income $ 10,000 - $19,999	10.60%	13.50%	13.80%	18.70%	17.10%	16.70%
Income $ 20,000 - $29,999	15.20%	14.80%	15.20%	15.60%	16.40%	17.80%
Income $ 30,000 - $39,999	12.60%	13.20%	15.20%	14.30%	14.40%	14.30%
Income $ 40,000 - $49,999	9.30%	10.20%	11.30%	12.00%	10.90%	10.50%
Income $ 50,000 - $59,999	10.90%	8.50%	8.40%	6.50%	7.20%	7.30%
Income $ 60,000 - $74,999	11.30%	9.90%	9.40%	4.80%	6.90%	7.20%
Income $ 75,000 - $99,999	10.80%	8.20%	7.70%	4.20%	5.50%	5.90%
Income $100,000 - $124,999	6.70%	4.80%	4.50%	2.00%	2.80%	3.30%
Income $125,000 - $149,999	3.20%	2.40%	2.30%	0.80%	1.20%	1.40%
Income $150,000 +	4.10%	3.60%	3.80%	2.80%	3.00%	3.10%
Average Household Income	$59,535	$51,965	$52,350	$39,055	$43,742	$45,295
Median Household Income	$46,822	$38,123	$38,164	$27,640	$31,005	$31,474
Per Capita Income	$25,104	$23,285	$23,142	$19,711	$18,959	$19,788
Vehicles Available						
0 Vehicles Available	4.70%	11.30%	9.20%	18.50%	14.10%	12.60%
1 Vehicle Available	37.80%	39.30%	40.40%	42.50%	40.10%	40.70%
2+ Vehicles Available	57.50%	49.50%	50.40%	39.10%	45.80%	46.60%
Average Vehicles Per Household	1.6	1.4	1.4	1.2	1.3	1.3
Total Vehicles Available	4,333	11,006	16,046	4,462	15,110	20,381
Population Trend						
1990	6,550	17,570	25,102	9,502	27,323	34,860
2000	6,346	17,157	24,455	9,319	26,083	33,181
Change 1990 to 2000	-3.10%	-2.40%	-2.60%	-1.90%	-4.50%	-4.80%
2009	6,619	18,012	25,915	10,044	27,682	35,188

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2014	7,493	20,360	29,409	11,263	31,135	39,623
Change 2009 to 2014	13.20%	13.00%	13.50%	12.10%	12.50%	12.60%
Household Trend						
1990	2,739	7,843	11,138	3,849	11,488	15,100
2000	2,717	7,803	11,085	3,826	11,376	15,010
Change 1990 to 2000	-0.80%	-0.50%	-0.50%	-0.60%	-1.00%	-0.60%
2009	2,521	7,288	10,455	3,661	10,722	14,133
2014	2,338	6,765	9,745	3,429	9,995	13,158
Change 2009 to 2014	-7.30%	-7.20%	-6.80%	-6.30%	-6.80%	-6.90%
Average Household Size Trend						
1990	2.39	2.22	2.23	2.11	2.18	2.14
2000	2.33	2.18	2.19	2.11	2.12	2.07
2009	2.63	2.45	2.45	2.38	2.38	2.33
2014	3.21	2.99	2.99	2.89	2.9	2.84
Median Age Trend						
1990	36	37	36	32	31	31
2000	37	38	37	32	31	30
Change 1990 to 2000	3.60%	3.30%	2.70%	-0.80%	-1.30%	-2.00%
2009	40	41	40	35	33	32
2014	41	42	40	36	34	33
Change 2009 to 2014	2.10%	2.30%	2.20%	2.90%	2.10%	1.80%
Housing Units Trend						
Total Housing Units						
Change 1990 to 2000	-0.30%	-0.20%	-0.10%	-0.10%	0.10%	0.10%
Change 2009 to 2014	-0.70%	-0.50%	-0.10%	0.40%	-0.10%	-0.20%
Owner Occupied Housing Units						
Change 1990 to 2000	-0.10%	0.20%	0.50%	1.20%	-1.20%	-1.00%

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Change 2009 to 2014	-6.30%	-6.10%	-5.80%	-4.20%	-5.20%	-5.10%
Renter Occupied Housing Units						
Change 1990 to 2000	-1.90%	-1.30%	-1.70%	-1.60%	-0.80%	-0.30%
Change 2009 to 2014	-9.00%	-8.70%	-8.20%	-7.80%	-8.10%	-8.40%
Vacant Housing Units						
Change 1990 to 2000	28.00%	13.40%	14.30%	18.30%	39.60%	28.90%
Change 2009 to 2014	64.60%	66.30%	63.00%	63.40%	58.40%	60.80%
Race and Ethnicity Trend						
American Indian, Eskimo, Aleut						
Change 1990 to 2000	-0.10%	18.30%	15.50%	46.00%	0.80%	-1.50%
Change 2009 to 2014	34.40%	22.90%	18.50%	4.70%	5.00%	8.10%
Asian or Pacific Islander						
Change 1990 to 2000	68.10%	79.50%	70.40%	53.20%	13.70%	4.80%
Change 2009 to 2014	-32.70%	-36.00%	-36.30%	-37.40%	-35.50%	-36.30%
Black						
Change 1990 to 2000	28.00%	52.50%	64.40%	44.10%	22.00%	14.80%
Change 2009 to 2014	40.70%	36.40%	32.30%	28.90%	24.40%	28.00%
White						
Change 1990 to 2000	-6.00%	-6.80%	-7.60%	-7.80%	-9.20%	-8.60%
Change 2009 to 2014	12.30%	13.30%	14.00%	13.80%	14.10%	13.80%
Other						
Change 1990 to 2000	123.70%	75.20%	68.00%	60.70%	21.70%	47.70%
Change 2009 to 2014	2.60%	-4.90%	-0.90%	-7.40%	-2.70%	-2.80%
Hispanic Ethnicity						
Change 1990 to 2000	29.30%	45.40%	53.40%	62.80%	39.60%	47.70%
Change 2009 to 2014	25.20%	25.60%	26.00%	23.20%	20.70%	22.20%
Not of Hispanic Ethnicity						
Change 1990 to 2000	-3.70%	-3.10%	-3.40%	-3.00%	-5.90%	-6.00%
Change 2009 to 2014	12.70%	12.50%	12.90%	11.60%	11.90%	12.10%
Demographic data © 2009 by Experian/Applied Geographic Solutions.						

	0.5 Miles: E CAPITOL DR & N OAKLAND AVE	1 Miles: E CAPITOL DR & N OAKLAND AVE	5 Minutes E CAPITOL DR & N OAKLAND AVE	20 Minutes: E CAPITOL DR & N OAKLAND AVE
2009 Demographics				
Total Population	8,849	23,796	36,818	590,362
Total Households	3,941	9,107	13,839	205,670
Female Population	4,823	12,541	19,247	303,739
% Female	54.50%	52.70%	52.30%	51.50%
Male Population	4,026	11,255	17,571	286,622
% Male	45.50%	47.30%	47.70%	48.60%
Population Density (per Sq. Mi.)	11,266.80	7,574.50	7,982.00	5,934.90
Age:				
Age 0 - 4	4.50%	5.20%	5.70%	8.00%
Age 5 - 14	10.70%	10.50%	11.40%	15.60%
Age 15 - 19	5.60%	9.00%	9.00%	8.00%
Age 20 - 24	6.70%	9.80%	11.90%	7.80%
Age 25 - 34	13.90%	13.70%	13.60%	13.10%
Age 35 - 44	13.70%	13.20%	12.80%	13.50%
Age 45 - 54	17.00%	16.70%	15.40%	13.90%
Age 55 - 64	11.90%	11.10%	10.60%	10.20%
Age 65 - 74	7.40%	5.40%	5.00%	5.00%
Age 75 - 84	5.60%	3.70%	3.20%	3.30%
Age 85 +	3.10%	1.90%	1.60%	1.70%
Median Age	41.4	36.6	33.7	33.1
Housing Units				
Total Housing Units	4,327	10,107	15,487	237,125
Owner Occupied Housing Units	41.40%	44.80%	44.40%	42.70%
Renter Occupied Housing Units	49.70%	45.30%	45.00%	44.00%
Vacant Housing Units	8.90%	9.90%	10.60%	13.30%
Race and Ethnicity				
American Indian, Eskimo, Aleut	0.40%	0.40%	0.40%	0.70%
Asian	3.10%	2.70%	2.50%	2.60%

	0.5 Miles: E CAPITOL DR & N OAKLAND AVE	1 Miles: E CAPITOL DR & N OAKLAND AVE	5 Minutes E CAPITOL DR & N OAKLAND AVE	20 Minutes: E CAPITOL DR & N OAKLAND AVE
Black	8.70%	10.30%	16.60%	33.40%
Hawaiian/Pacific Islander	0.10%	0.10%	0.10%	0.10%
White	81.70%	80.10%	73.70%	50.80%
Other	1.50%	2.30%	2.70%	8.10%
Multi-Race	4.50%	4.10%	4.00%	4.30%
Hispanic Ethnicity	4.60%	5.40%	6.30%	15.60%
Not of Hispanic Ethnicity	95.40%	94.60%	93.80%	84.40%
Marital Status:				
Age 15 + Population	7,497	20,082	30,536	451,317
Divorced	10.30%	9.50%	8.80%	10.80%
Never Married	35.20%	40.10%	43.60%	41.60%
Now Married	43.90%	41.30%	38.80%	35.30%
Separated	4.40%	4.40%	4.60%	6.20%
Widowed	6.30%	4.80%	4.20%	6.20%
Educational Attainment:				
Total Population Age 25+	6,415	15,631	22,852	358,346
Grade K - 8	1.40%	1.10%	1.40%	4.90%
Grade 9 - 12	3.00%	3.00%	4.40%	11.30%
High School Graduate	16.10%	13.90%	15.60%	31.10%
Associates Degree	6.40%	6.20%	6.10%	6.70%
Bachelor's Degree	33.50%	32.90%	31.00%	16.70%
Graduate Degree	26.70%	29.20%	27.10%	10.70%
Some College, No Degree	12.80%	13.70%	14.40%	18.70%
Household Income:				
Income $ 0 - $9,999	8.80%	6.90%	8.00%	11.80%
Income $ 10,000 - $14,999	4.70%	4.00%	4.30%	5.90%
Income $ 15,000 - $24,999	10.50%	9.70%	10.40%	13.00%
Income $ 25,000 - $34,999	9.90%	8.80%	9.90%	12.10%
Income $ 35,000 - $49,999	15.70%	15.10%	14.90%	15.80%

	0.5 Miles: E CAPITOL DR & N OAKLAND AVE	1 Miles: E CAPITOL DR & N OAKLAND AVE	5 Minutes E CAPITOL DR & N OAKLAND AVE	20 Minutes: E CAPITOL DR & N OAKLAND AVE
Income $ 50,000 - $74,999	16.30%	17.10%	16.70%	17.40%
Income $ 75,000 - $99,999	11.70%	12.30%	10.90%	10.10%
Income $100,000 - $124,999	8.70%	8.50%	8.00%	5.70%
Income $125,000 - $149,999	3.90%	4.70%	4.40%	2.70%
Income $150,000 +	9.80%	12.90%	12.40%	5.70%
Average Household Income	$66,643	$81,114	$76,496	$55,556
Median Household Income	$50,470	$56,180	$52,621	$41,754
Per Capita Income	$29,288	$33,430	$29,963	$19,904
Vehicles Available:				
0 Vehicles Available	14.50%	11.50%	12.30%	18.70%
1 Vehicle Available	46.10%	43.90%	42.40%	42.00%
2+ Vehicles Available	39.40%	44.60%	45.40%	39.30%
Average Vehicles Per Household	1.4	1.5	1.6	1.4
Total Vehicles Available	5,333	13,598	21,746	282,906
Business and Employment:				
Number of Employees	3,117	11,115	19,236	383,308
Number of Establishments	308	768	1,211	21,947
2014 Demographics				
Total Population	10,013	26,746	41,429	677,056
Total Households	3,668	8,472	12,872	196,388
Female Population	5,437	14,036	21,561	346,903
% Female	54.30%	52.50%	52.00%	51.20%
Male Population	4,576	12,710	19,868	330,153
% Male	45.70%	47.50%	48.00%	48.80%
Age:				
Age 0 - 4	4.20%	4.70%	5.20%	7.10%
Age 5 - 14	11.00%	10.70%	11.50%	15.40%

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Age 15 - 19	5.40%	8.50%	8.50%	7.60%
Age 20 - 24	6.90%	9.80%	11.90%	8.00%
Age 25 - 34	13.70%	13.60%	13.60%	13.10%
Age 35 - 44	12.60%	12.20%	11.80%	12.50%
Age 45 - 54	16.20%	16.10%	14.80%	13.40%
Age 55 - 64	13.30%	12.60%	12.10%	11.70%
Age 65 - 74	9.10%	6.80%	6.30%	6.50%
Age 75 - 84	5.20%	3.50%	3.10%	3.20%
Age 85 +	2.60%	1.70%	1.40%	1.50%
Median Age	42.3	37.5	34.5	34
Housing Units Trend				
Total Housing Units	4,316	10,077	15,440	242,552
Owner Occupied Housing Units	39.40%	42.50%	42.00%	39.90%
Renter Occupied Housing Units	45.60%	41.60%	41.30%	41.00%
Vacant Housing Units	15.00%	15.90%	16.60%	19.00%
Race and Ethnicity				
American Indian, Eskimo, Aleut	0.40%	0.40%	0.40%	0.60%
Asian	1.70%	1.60%	1.50%	1.60%
Black	10.60%	11.70%	16.50%	29.30%
Hawaiian/Pacific Islander	0.10%	0.10%	0.10%	0.10%
White	82.60%	80.90%	75.70%	56.50%
Other	1.20%	2.00%	2.40%	8.20%
Multi-Race	3.50%	3.40%	3.40%	3.90%
Hispanic Ethnicity	5.00%	5.90%	6.70%	16.10%
Not of Hispanic Ethnicity	95.00%	94.10%	93.30%	83.90%
Marital Status:				
Age 15 + Population	8,503	22,661	34,569	525,033
Divorced	10.30%	9.50%	8.80%	10.90%
Never Married	35.20%	39.90%	43.50%	41.80%

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Now Married	44.00%	41.50%	39.00%	35.00%
Separated	4.30%	4.30%	4.50%	6.20%
Widowed	6.20%	4.70%	4.20%	6.10%
Educational Attainment:				
Total Population Age 25+	7,273	17,769	26,115	419,634
Grade K - 9	1.00%	0.80%	1.00%	3.40%
Grade 9 - 12	2.90%	2.90%	4.20%	10.70%
High School Graduate	16.80%	14.50%	16.30%	32.40%
Associates Degree	6.80%	6.50%	6.40%	7.10%
Bachelor's Degree	31.70%	31.00%	29.20%	15.80%
Graduate Degree	27.40%	30.00%	27.80%	11.00%
Some College, No Degree	13.50%	14.40%	15.10%	19.70%
Household Income:				
Income $ 0 - $9,999	8.20%	6.40%	7.50%	11.10%
Income $ 10,000 - $14,999	4.50%	3.80%	4.10%	5.60%
Income $ 15,000 - $24,999	9.50%	8.90%	9.40%	12.00%
Income $ 25,000 - $34,999	9.50%	8.30%	9.50%	11.50%
Income $ 35,000 - $49,999	14.30%	13.30%	13.40%	15.00%
Income $ 50,000 - $74,999	17.00%	18.00%	17.70%	18.10%
Income $ 75,000 - $99,999	11.40%	11.90%	10.60%	10.20%
Income $100,000 - $124,999	9.60%	9.30%	8.70%	6.70%
Income $125,000 - $149,999	4.80%	5.40%	5.10%	3.30%
Income $150,000 +	11.20%	14.70%	14.10%	6.60%
Average Household Income	$72,119	$86,912	$81,961	$59,411
Median Household Income	$54,656	$60,641	$56,632	$44,045
Per Capita Income	$26,054	$29,660	$26,540	$17,707
Vehicles Available				
0 Vehicles Available	14.60%	11.50%	12.30%	19.00%
1 Vehicle Available	46.00%	43.80%	42.30%	42.00%

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2+ Vehicles Available	39.40%	44.70%	45.50%	39.00%
Average Vehicles Per Household	1.3	1.4	1.5	1.3
Total Vehicles Available	4,962	12,647	20,174	268,999
2000 Census Demographics				
Total Population	8,375	22,460	34,834	554,829
Total Households	4,200	9,678	14,731	214,951
Female Population	4,608	11,951	18,387	288,411
% Female	55.00%	53.20%	52.80%	52.00%
Male Population	3,767	10,508	16,448	266,418
% Male	45.00%	46.80%	47.20%	48.00%
Age:				
Age 0 - 4	4.30%	4.70%	5.30%	7.70%
Age 5 - 14	11.00%	10.60%	11.60%	16.60%
Age 15 - 19	5.50%	9.40%	9.30%	8.10%
Age 20 - 24	7.40%	10.90%	13.40%	8.50%
Age 25 - 34	16.70%	16.40%	16.20%	15.40%
Age 35 - 44	14.80%	14.30%	13.60%	14.60%
Age 45 - 54	15.00%	14.70%	13.40%	12.00%
Age 55 - 64	7.90%	7.40%	7.00%	6.70%
Age 65 - 74	8.10%	5.70%	5.30%	5.30%
Age 75 - 84	6.60%	4.30%	3.60%	3.80%
Age 85 +	2.70%	1.60%	1.30%	1.40%
Median Age	38.5	33.6	31.1	30.8
Housing Units Trend				
Total Housing Units	4,297	10,009	15,363	231,009
Owner Occupied Housing Units	41.10%	45.10%	44.70%	43.20%
Renter Occupied Housing Units	56.60%	51.60%	51.20%	49.80%
Vacant Housing Units	2.30%	3.30%	4.10%	7.00%

	0.5 Miles: E CAPITOL DR & N OAKLAND AVE	1 Miles: E CAPITOL DR & N OAKLAND AVE	5 Minutes E CAPITOL DR & N OAKLAND AVE	20 Minutes: E CAPITOL DR & N OAKLAND AVE
Race and Ethnicity				
American Indian	0.30%	0.40%	0.40%	0.80%
Asian	3.70%	3.10%	2.80%	3.10%
Black	2.80%	4.80%	13.20%	36.30%
White	90.30%	88.40%	80.00%	51.10%
Other	0.70%	1.30%	1.60%	6.20%
Two or More Races	2.20%	2.00%	2.00%	2.60%
Hispanic Ethnicity	2.70%	3.40%	4.10%	12.00%
Not of Hispanic Ethnicity	97.30%	96.60%	95.90%	88.00%
Marital Status:				
Age 15 + Population	7,092	19,008	28,949	420,094
Divorced	10.30%	9.50%	8.80%	10.80%
Never Married	35.20%	40.20%	43.80%	41.50%
Now Married	43.70%	41.00%	38.50%	35.30%
Separated	4.40%	4.50%	4.60%	6.20%
Widowed	6.40%	4.80%	4.30%	6.20%
Educational Attainment:				
Total Population Age 25+	6,015	14,452	21,047	327,822
Grade K - 9	1.70%	1.30%	1.60%	5.90%
Grade 9 - 11, No diploma	4.20%	4.30%	6.40%	16.40%
High School Graduate	14.40%	12.30%	13.70%	26.60%
Associates Degree	5.60%	5.40%	5.20%	5.30%
Bachelor's Degree	34.60%	34.10%	31.80%	15.50%
Graduate Degree	24.60%	26.90%	24.80%	9.00%
Some College, No Degree	14.40%	15.40%	16.00%	19.60%
No Schooling Completed	0.50%	0.40%	0.50%	1.70%
Public School Enrollment	82.70%	83.30%	85.00%	78.20%
Private School Enrollment	17.30%	16.70%	15.00%	21.80%

	0.5 Miles: E CAPITOL DR & N OAKLAND AVE	1 Miles: E CAPITOL DR & N OAKLAND AVE	5 Minutes E CAPITOL DR & N OAKLAND AVE	20 Minutes: E CAPITOL DR & N OAKLAND AVE
Household Income:				
Income $ 0 - $9,999	10.70%	8.50%	9.70%	14.10%
Income $ 10,000 - $14,999	6.50%	5.60%	5.90%	7.80%
Income $ 15,000 - $24,999	13.10%	11.80%	13.00%	15.70%
Income $ 25,000 - $34,999	13.50%	12.10%	12.50%	14.60%
Income $ 35,000 - $49,999	15.00%	16.40%	16.20%	16.30%
Income $ 50,000 - $74,999	17.00%	17.80%	16.10%	16.10%
Income $ 75,000 - $99,999	11.10%	10.80%	10.20%	7.40%
Income $100,000 - $124,999	4.50%	5.60%	5.40%	3.10%
Income $125,000 - $149,999	3.50%	3.60%	3.70%	1.60%
Income $150,000 - $199,999	2.20%	2.80%	2.50%	1.30%
Income $200,000 or More	2.90%	5.10%	4.70%	2.00%
Average Household Income	$56,746	$66,795	$63,782	$47,169
Median Household Income	$40,416	$45,202	$42,402	$33,381
Per Capita Income	$28,456	$28,782	$26,972	$18,274
Vehicles Available				
0 Vehicles Available	16.10%	12.50%	13.40%	21.30%
1 Vehicle Available	47.00%	45.00%	43.10%	42.30%
2 Vehicles Available	30.60%	34.10%	34.20%	28.10%
3+ Vehicles Available	6.40%	8.40%	9.30%	8.30%
Average Vehicles Per Household	1.3	1.4	1.4	1.2
Total Vehicles Available	5,387	13,589	20,946	271,934
Blue Collar Occupations	790	2,551	4,476	100,106
White Collar Occupations	3,785	10,368	14,842	139,201
% Blue Collar Workers	17.30%	19.80%	23.20%	41.80%
% White Collar Workers	82.70%	80.30%	76.80%	58.20%
1990 Demographics				

	0.5 Miles: E CAPITOL DR & N OAKLAND AVE	1 Miles: E CAPITOL DR & N OAKLAND AVE	5 Minutes E CAPITOL DR & N OAKLAND AVE	20 Minutes: E CAPITOL DR & N OAKLAND AVE
Total Population	8,544	23,264	37,048	585,627
Total Households	4,203	9,779	15,015	222,787
Female Population	4,920	12,680	19,860	308,195
% Female	57.60%	54.50%	53.60%	52.60%
Male Population	3,624	10,584	17,188	277,432
% Male	42.40%	45.50%	46.40%	47.40%
Age:				
Total Population	8,544	23,264	37,048	585,627
Age 0 - 4	5.40%	5.70%	6.60%	8.70%
Age 5 - 14	10.10%	9.70%	11.00%	15.40%
Age 15 - 19	4.40%	7.90%	8.10%	7.30%
Age 20 - 24	6.50%	10.60%	12.20%	8.60%
Age 25 - 34	19.90%	19.30%	19.40%	18.40%
Age 35 - 44	17.10%	16.70%	15.60%	14.00%
Age 45 - 54	8.70%	9.00%	8.50%	8.10%
Age 55 - 64	7.20%	6.80%	6.40%	7.40%
Age 65 - 74	9.20%	6.90%	6.00%	6.50%
Age 75 - 84	8.40%	5.50%	4.60%	4.10%
Age 85 +	3.20%	2.00%	1.60%	1.40%
Median Age	37	33.3	30.9	30.3
Housing Units				
Total Housing Units	4,312	10,028	15,500	236,581
Owner Occupied Housing Units	40.30%	45.00%	45.10%	43.00%
Renter Occupied Housing Units	57.20%	52.50%	51.70%	51.10%
Vacant Housing Units	2.50%	2.50%	3.10%	5.80%
Race and Ethnicity				
American Indian	0.20%	0.30%	0.40%	0.90%
Asian	1.60%	2.20%	2.40%	2.00%
Black	1.80%	3.40%	14.00%	31.60%

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White	95.90%	93.30%	82.00%	62.10%
Other	0.50%	0.80%	1.30%	3.50%
Hispanic Ethnicity	1.80%	2.10%	2.90%	6.40%
Not of Hispanic Ethnicity	98.20%	97.90%	97.10%	93.60%
Educational Attainment:				
Total Population Age 25+	6,295	15,391	22,990	350,720
Grade K - 9	4.20%	3.50%	4.50%	9.60%
Grade 9 - 12	6.90%	5.30%	8.00%	17.60%
High School Graduate	14.90%	14.60%	15.80%	28.20%
Associates Degree	4.20%	4.80%	5.20%	5.50%
Bachelor's Degree	28.30%	29.50%	27.30%	13.20%
Graduate Degree	22.10%	23.40%	20.80%	7.10%
Some College, No Degree	19.40%	18.80%	18.50%	18.80%
1990 Household Income:				
Income $ 0 - $9,999	16.10%	13.00%	14.00%	21.60%
Income $ 10,000 - $19,999	15.60%	15.70%	17.30%	20.90%
Income $ 20,000 - $29,999	16.70%	16.00%	16.00%	17.50%
Income $ 30,000 - $39,999	12.90%	14.40%	13.90%	13.80%
Income $ 40,000 - $49,999	11.10%	10.50%	10.20%	9.60%
Income $ 50,000 - $59,999	8.20%	7.80%	7.20%	6.00%
Income $ 60,000 - $74,999	6.90%	7.70%	7.50%	4.70%
Income $ 75,000 - $99,999	5.90%	6.30%	6.00%	3.00%
Income $100,000 - $124,999	2.80%	3.60%	3.40%	1.10%
Income $125,000 - $149,999	1.50%	1.80%	1.40%	0.50%
Income $150,000 +	2.40%	3.30%	3.10%	1.30%
Average Household Income	$41,709	$46,772	$45,368	$31,928
Median Household Income	$30,814	$32,812	$31,371	$23,859
Per Capita Income	$20,385	$21,103	$18,763	$12,279

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Vehicles Available				
0 Vehicles Available	16.20%	12.50%	14.80%	23.60%
1 Vehicle Available	41.40%	41.00%	39.10%	36.40%
2+ Vehicles Available	42.40%	46.50%	46.10%	40.10%
Average Vehicles Per Household	1.2	1.3	1.3	1.2
Total Vehicles Available	5,138	13,112	19,935	268,116
Population Trend				
1990	8,544	23,264	37,048	585,627
2000	8,375	22,460	34,834	554,829
Change 1990 to 2000	-2.00%	-3.50%	-6.00%	-5.30%
2009	8,849	23,796	36,818	590,362
2014	10,013	26,746	41,429	677,056
Change 2009 to 2014	13.20%	12.40%	12.50%	14.70%
Household Trend				
1990	4,203	9,779	15,015	222,787
2000	4,200	9,678	14,731	214,951
Change 1990 to 2000	-0.10%	-1.00%	-1.90%	-3.50%
2009	3,941	9,107	13,839	205,670
2014	3,668	8,472	12,872	196,388
Change 2009 to 2014	-6.90%	-7.00%	-7.00%	-4.50%
Average Household Size Trend				
1990	1.98	2.2	2.32	2.55
2000	1.95	2.16	2.23	2.51
2009	2.2	2.43	2.5	2.79
2014	2.68	2.96	3.05	3.36
Median Age Trend				
1990	37	33	31	30
2000	39	34	31	31

	0.5 Miles: E CAPITOL DR & N OAKLAND AVE	1 Miles: E CAPITOL DR & N OAKLAND AVE	5 Minutes E CAPITOL DR & N OAKLAND AVE	20 Minutes: E CAPITOL DR & N OAKLAND AVE
Change 1990 to 2000	4.00%	1.00%	0.40%	1.50%
2009	41	37	34	33
2014	42	38	35	34
Change 2009 to 2014	2.20%	2.50%	2.30%	2.70%
Housing Units Trend				
Total Housing Units				
Change 1990 to 2000	-0.40%	-0.20%	-0.90%	-2.40%
Change 2009 to 2014	-0.20%	-0.30%	-0.30%	2.30%
Owner Occupied Housing Units				
Change 1990 to 2000	1.80%	0.00%	-1.90%	-1.90%
Change 2009 to 2014	-5.20%	-5.60%	-5.50%	-4.30%
Renter Occupied Housing Units				
Change 1990 to 2000	-1.30%	-1.90%	-1.80%	-4.90%
Change 2009 to 2014	-8.30%	-8.40%	-8.40%	-4.70%
Vacant Housing Units				
Change 1990 to 2000	-9.70%	33.80%	30.90%	16.50%
Change 2009 to 2014	68.10%	60.60%	55.80%	46.80%
Race and Ethnicity Trend				
American Indian, Eskimo, Aleut				
Change 1990 to 2000	40.70%	18.50%	6.90%	-13.00%
Change 2009 to 2014	14.60%	9.60%	7.60%	-0.30%
Asian or Pacific Islander				
Change 1990 to 2000	125.20%	37.80%	12.90%	44.90%
Change 2009 to 2014	-36.40%	-35.80%	-34.80%	-31.40%
Black				
Change 1990 to 2000	53.00%	36.40%	-11.20%	9.00%
Change 2009 to 2014	36.80%	28.00%	12.40%	0.30%
White				
Change 1990 to 2000	-7.70%	-8.50%	-8.30%	-22.00%

	0.5 Miles: E CAPITOL DR & N OAKLAND AVE	1 Miles: E CAPITOL DR & N OAKLAND AVE	5 Minutes E CAPITOL DR & N OAKLAND AVE	20 Minutes: E CAPITOL DR & N OAKLAND AVE
Change 2009 to 2014	14.40%	13.50%	15.60%	27.50%
Other				
Change 1990 to 2000	39.80%	58.40%	16.10%	69.10%
Change 2009 to 2014	-10.80%	-3.80%	-0.50%	15.70%
Hispanic Ethnicity				
Change 1990 to 2000	51.70%	55.40%	34.10%	77.00%
Change 2009 to 2014	24.10%	21.80%	20.90%	18.10%
Not of Hispanic Ethnicity				
Change 1990 to 2000	-2.90%	-4.70%	-7.20%	-10.90%
Change 2009 to 2014	12.60%	11.90%	12.00%	14.10%
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