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# NEW YORK STATE GATEWAY & COMMERCE CENTER RIPLEY FEASIBILITY STUDY

Ripley, New York



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Prepared For:  
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Planning & Development  
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# 1. EXECUTIVE SUMMARY

## INTRODUCTION AND PURPOSE

RKG Associates (RKG), in partnership with Clark Patterson Lee (CPL), and on behalf of the Chautauqua County Department of Planning & Development, was retained to complete a feasibility study for a potential New York State Gateway & Commerce Center near Exit 61 (eastbound) of the New York State Thruway, just east of the Pennsylvania border in Ripley, New York at Shortman Road. The purpose of this analysis is to offer an independent quantitative and qualitative analysis reflecting the potential market demand for a Ripley Gateway Center (RGC) at this location. The design and layout of the RGC is generally accepted to be a broader concept than a typical welcome center or more standard rest area, specifically:

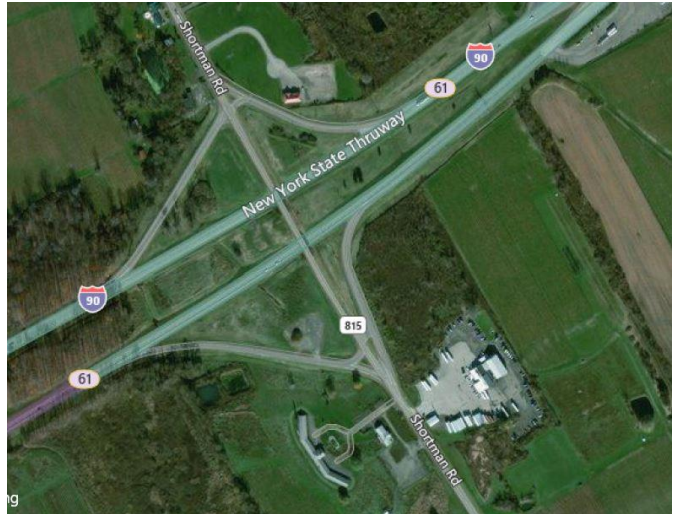


Photo 1 – Aerial view of RGC site - Exit 61 at Shortman Road

- For the RGC to serve as a distinct signature and iconic gateway entrance into the State of New York, attractive to both the local population as well as to the tourism and general traveler sectors.
- For the RGC to offer a destination location for selected retail, dining and entertainment venues with a focus on highlighting (western) New York products, vendors and artisans.
- For the RGC to foster expanded economic activities off-site, throughout the State of New York, but more directly throughout Chautauqua County, the Town of Ripley and the Route 20 corridor, serving as a catalyst for these economies.<sup>1</sup>
- For the proposed RGC to be flexible in site design and layout as to accommodate potential future expansion and development of both indoor and outdoor components.

This analysis reviews market supply and demand indicators for selected retail, entertainment, hospitality, retail and tourism venues, along with summaries of interviews from area stakeholders, to estimate the supportable square feet (SF) for a proposed RGC. Further, preliminary design and concept examples are offered (under separate cover from CPL). This

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<sup>1</sup> A concept often cited as a model for a gateway center is the expansive Tamarack Welcome Center (TWC) in Beckley, WV, described elsewhere in this report and at [www.tamarackwv.com](http://www.tamarackwv.com).

analysis does not address any financial, marketing or day-to-day operational issues with a gateway center, but rather focuses on demand indicators, both quantitative and qualitative, reflecting potential market viability.

## CONCLUSIONS AND RECOMMENDATIONS

The basis of these conclusions, along with the inputs and assumptions, are detailed throughout the remainder of this report. First, RKG established a benchmark range (supportable SF) for the proposed Ripley Gateway Center by reviewing the recommended and desired sizes of other welcome and travel centers throughout New York, indexing these to annual average daily traffic (AADT) counts per 1,000 (Table 1). The average of these benchmarks indicates that an RGC of approximately 17,100 SF with 8,400 SF for public space such as restrooms, visitor and information services and operations/mechanicals, with approximately another 8,700 SF of revenue generating space used for retail use and dining. The range identified in Table 1 is offered for benchmarking and reference only and is not intended to suggest a “right-sized” RGC, but rather, indicate that a “right-sized” RGC, as determined by an independent market analysis, should reasonably fall somewhere within this range of 11,200 SF to 22,700 SF, specifically reflecting the opportunities presented by a Ripley location.

Table 1 – Benchmarked Size, SF by Component, NY State Welcome and Visitor Centers

<b>Proposed Ripley Welcome Center</b>	<b>Public SF</b>	<b>Revenue Generating SF</b>	<b>TOTAL SF</b>
High estimate	11,155	11,500	22,655
Medium estimate	8,580	8,846	17,426
Low Estimate	5,375	5,802	11,177
<b>Average</b>	<b>8,370</b>	<b>8,716</b>	<b>17,086</b>

Source : RKG and NYSTA (2019)

Second, and inclusive of the average benchmark space (SF) for public use, RKG developed estimates of the potential SF for revenue generating space based on an analysis of market area metrics (as detailed throughout this report) and interest from local stakeholder interviews, or in other words, the specific opportunities presented by a Ripley location.

- Based on the estimates of recaptured retail sales leakage, from market area households in a 30-mile radius, specifically for specialty food, specialty retail and dining/drinking, RKG estimates a supportable 1,046 SF from the 10-mile households; 1,352 SF from the 10 to 20-mile households; and, 399 SF from the 20 to 30-mile households, for a total of 2,797 SF.
- Assuming varying capture rates (by radii) market area household spending for arcades and ticketed concerts results in an estimated supportable demand of 2,110 SF, reflecting 2,015 SF for a performance space (and/or outdoor seating) venue and 95 SF for an arcade venue.
- The local stakeholders interviewed as a part of this analysis all indicated some interest in being a part of the proposed RGC, and RKG recommends that they be kept in the ongoing conversation with the Chautauqua County Department of Planning & Development. That said, most of the participation from these stakeholders would take



the form of exhibition and display space (essentially with no lease fee for the space), for the purposes of advertising and generating awareness of other destinations throughout Chautauqua County. RKG assumes that much of this exhibition space would be located throughout the RGC as part of the interior layout but has assigned an estimated factor of 500 SF for area measurements (excluding wine related venues).<sup>2</sup>

- Preliminary conversations with representatives of the Grape Discovery Center, Lake Erie Wine Country and local wineries indicate some desire to be a part of the RGC, provided any legal questions regarding sale and consumption of alcohol on-site are addressed along with other financial concerns. RKG has allocated 2,000 SF in this analysis, which could be higher if some on-site kitchen and/or culinary space were to be included.

In summary, a venue of approximately 15,800 SF (Table 2) reflects the benchmark standards of other centers in New York and RKG's analysis of locally supportable space.

Table 2 – Estimated Supportable SF for Ripley Gateway Center

2018 Estimates (SF)		Total(s)	10-Mile	10 to 20- Mile	20 to 30-Mile
<b>BASELINE</b>	Public Space /1	8,370	0	0	0
	<b>public space</b>	<b>8,370</b>	-	-	-
<b>RETAIL</b>	Specialty Food	695	40	439	216
	Specialty/Niche Retail	669	486	-	183
	Dining, Drinking	1,433	519	914	0
	<b>retail</b>	<b>2,797</b>	<b>1,046</b>	<b>1,352</b>	<b>399</b>
<b>VENUES</b>	Performance Space	2,016	258	1,025	733
	Arcade	93	12	48	34
	<b>venues</b>	<b>2,110</b>	<b>270</b>	<b>1,073</b>	<b>767</b>
<b>STAKEHOLDER</b>	Exhibition	500			
	Wine Related	2,000			
	<b>stakeholder</b>	<b>2,500</b>	-	-	-
<b>TOTAL for proposed Ripley Welcome Center</b>		<b>15,777</b>			

Source: RKG Associates, Inc. (2019)

1/ Baseline standard for public space (blende average)

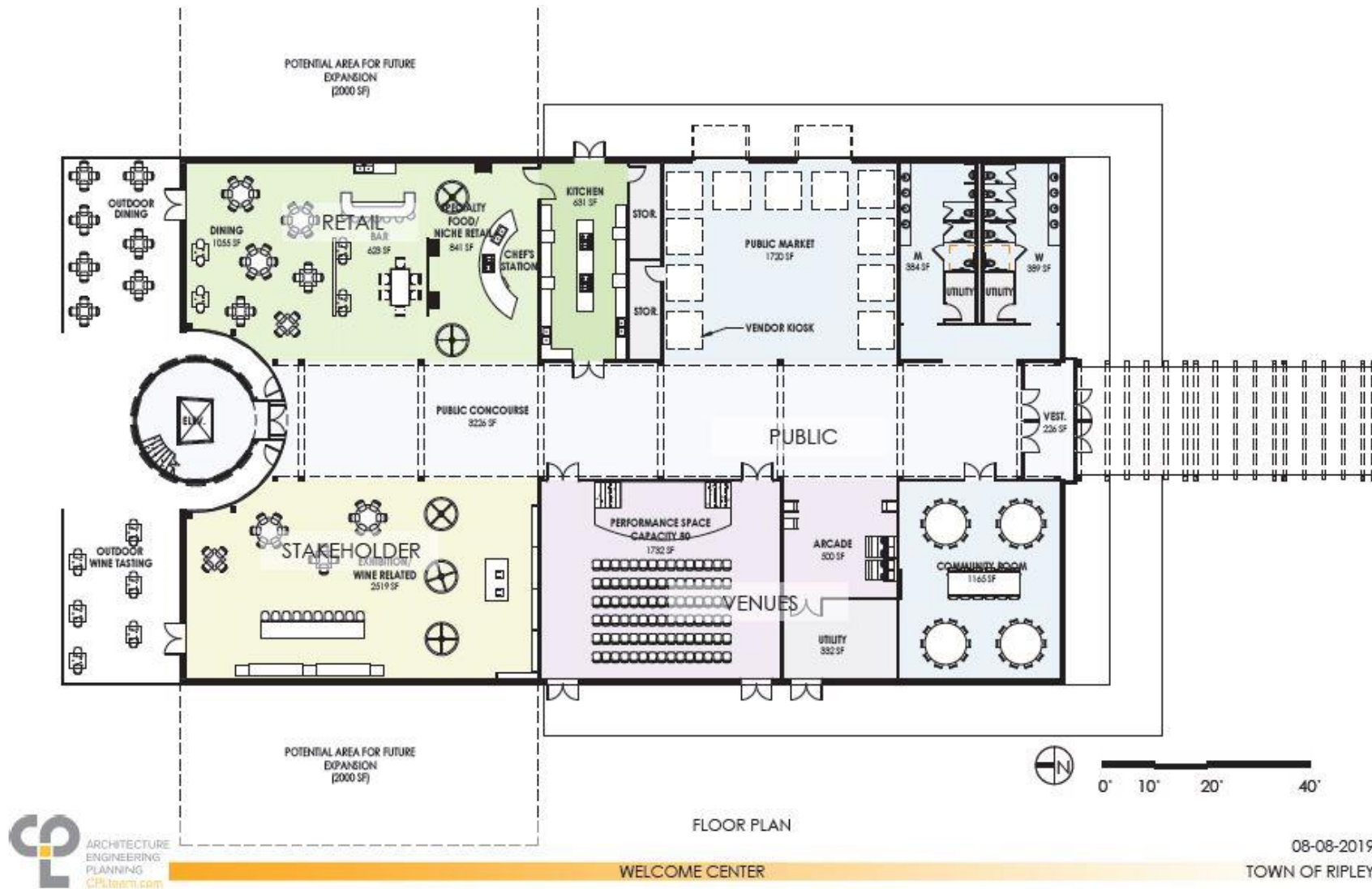
## CONCEPTUAL LAYOUT

A conceptual, and preliminary, interior layout of the proposed Ripley Gateway Center, as developed by CPL,<sup>3</sup> indicates an RGC totaling 15,350± SF (exclusive of outdoor patio/seating) including, but not limited to:

- Public Concourse and entrance Vestibule – 3,450± SF
- Performance space (80-seat capacity) – 1,730± SF
- Stakeholder space, wine related, with outdoor seating – 2,520± SF
- Retailing space for dining, drinking, specialty foods, café kitchen – 3,150± SF
- Community space (1,165± SF) and Arcade area (500± SF)
- On-site expansion capacities (initially, 4,000± SF)

<sup>2</sup> In discussions with some area stakeholders, RKG understands that wine sales along the Thruway could be a political and otherwise contentious issue for many organizations. This analysis assumes that that issue has been resolved.

<sup>3</sup> More detailed conceptual renderings, designs and layouts, as prepared by CPL, are presented under separate cover.





## DESIGN AND COMPONENTS

In preparing the design behind the Ripley Gateway Center, CPL offers the following:

- From the moment you visually connect with the Gateway Center Observation Tower, from the NYS Thruway, you know there is something unique about this facility.
- As you move from the parking area to the building you will encounter local farmers and their fresh produce, that continues as you move into the building where we have dedicated space for an indoor public market during inclement weather.
- The facility also contains a Community Room that can be reserved and used by the local community groups that might require a gathering place.
- In order to assist in capitalizing on regional/national destinations like the National Comedy Center and the regional grape and wine production, we created spaces that celebrate and showcase these components such as a performance space that will allow for live and video venues, a wine exhibition, tasting and retail space.
- In addition, there will be a fine dining restaurant with indoor and outdoor seating as well as a cocktail lounge and a unique specialty food/niche retail. This space also contains a chef's cooking station where we can showcase local foods, meats and cheeses and truly bring the food from farm to table.

One can imagine walking into the Ripley Gateway Center and hearing the clanking of glasses and silverware and the aroma of local foods being prepared and enjoyed. At the terminus of the public spine, visitors and locals can enjoy the walk or elevator ride up the observation tower to have a unique and special view of Lake Erie in the distance.

## OTHER CONSIDERATIONS

As part of RKG's discussions with the project team and the Chautauqua County Department of Planning & Development, it is possible that the frontage parcel<sup>4</sup> (the former Colonial Squire Restaurant) may be developed separately with speculative interest from a petroleum company. If so, and to the extent possible, RKG recommends that any sales and/or distribution of non-petroleum components, such as food, souvenirs and other travelers needs



Photo 2 – RGC site (ground view) to Thruway

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<sup>4</sup> A review of the tax cards indicates that the former restaurant site may represent 5.0-acres of the total 10.2-acre site.

commodities, be limited in order to direct travelers to and support the RGC.<sup>5</sup>

In the same discussions, some interest was expressed for more expansive development at the RGC, to include a hospitality component, a recreational component or retail outlets. While RKG did not conduct a detailed analysis for these elements, they may be appropriate for this general location and market at some future time. Reportedly there may be two parcels (adjacent) on the opposite side of the Thruway that are available, one a single-use property of 9.2-acres and the other, a vacant (a former truck stop) parcel of 13.5-acres, both zoned C-2. If the Chautauqua County Department of Planning & Development, or a designated redevelopment authority, were to purchase these properties then there would be ownership and site control for any future development around this entry point into New York state.



Photo 3 – former truck stop site

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<sup>5</sup> The potential for a traveler to visit/utilize the proposed RGC is enhanced by the availability of auto services on site, but these should be distinct from other traveler services and amenities, in other words the service station component should complement the RGC and not compete with the RGC.

## 2. BASELINE CONDITIONS

### LOCATION CHARACTERISTICS

According to assessor records the property is 10.2 acres and has a restaurant (4,300 SF) and a motel (11,991 SF),<sup>6</sup> previously known as the Colonial Squire restaurant and motel. Both structures are now vacant. Current assessed value for the property is \$224,00, with the improvements contributing \$10,000 (indicating a land value of approximately \$21,000/acre).

The property is zoned Commercial Rural (C-2) which “is established for the purpose of setting rural areas apart that can provide room for a growing community without disrupting the environment of other districts”.<sup>7</sup> The C-2 zone allows for most retail-type uses by right and others by special permit. Non-residential uses allow for a 35 percent lot coverage and a maximum of three stories. Reported annual average daily traffic (AADT) counts at Exit 61 are 21,982 autos. Visibility of the potential site is good when approaching from the Thruway and access is very good, reflecting an immediate right turn at the end of the ramp.



Photo 4 – former Colonial Squire Restaurant



Photo 5 – former Colonial Squire Motel

### MARKET AREA METRICS

RKG estimates that there will be two target audiences of potential users for the proposed RGC: residents/households within an approximate 30-mile radius (market area)<sup>8</sup> of the proposed welcome center, and New York State Thruway traffic.

### NEW YORK STATE THRUWAY AUTHORITY (NYSTA) SERVICE AREAS

NYSTA issued a request for proposal (RFP)<sup>9</sup> regarding repositioning the service areas throughout the state, dated October 15, 2018. In the RFP a map of service area locations was presented, along with types of service area, recommended size (square footage) of development and associated AADT counts (2017).<sup>10</sup> The following presents a summary

<sup>6</sup> This excludes an accessory use building with 357 SF of gross floor area.

<sup>7</sup> Town of Ripley Zoning, February 9, 2017

<sup>8</sup> This analysis takes the intersection of Interstate-90 at Exit 61 as the center of the selected radii.

<sup>9</sup> RFP – 18C15 – Design, Construction, Financing, Operation and Maintenance of 27 Services Areas on the New York State Thruway

<sup>10</sup> These metrics are offered as reference benchmarks, only.

description of the service area types (definitions) and the metrics developed by RKG, equating size (SF) to AADT counts per 1,000 autos.

### LIMITED SERVICE AREA (LEVEL 1 @ 3,525 SF)

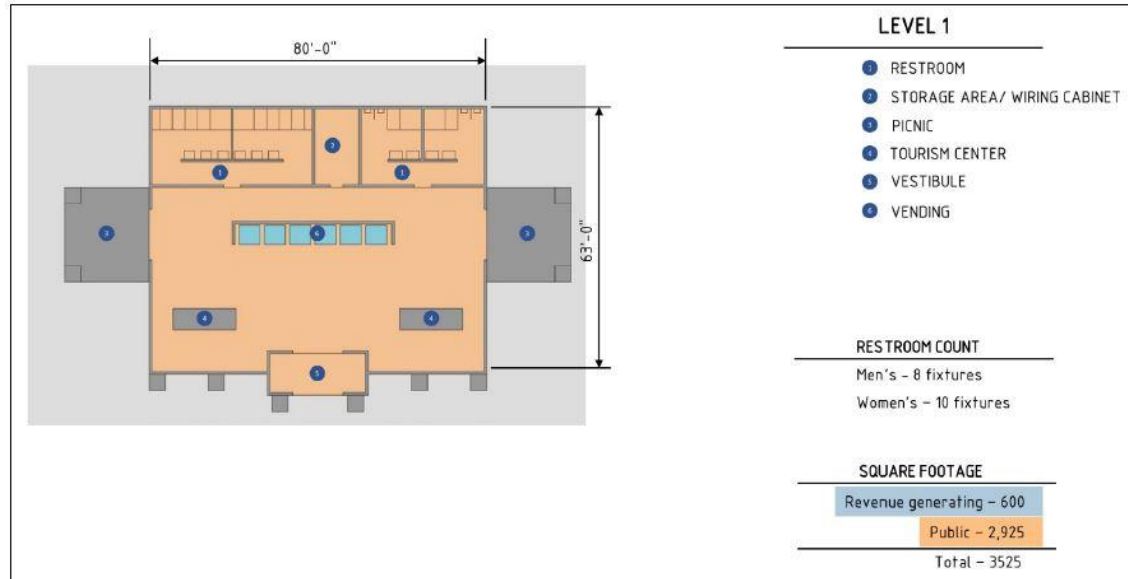


Figure 1 – Conceptual schematic of Level 1–Limited Service Area

With vending only and no commercial services in the main building, this 3,525 gross square foot prototype is envisioned as a limited service area providing “comfort stations” on the Thruway. Services included in a Level 1 Service Area: vending machines, restrooms, tourism kiosks, outdoor picnic and seating areas and ample parking to accommodate passenger, commercial vehicles and buses.

- The 3,525 SF footprint includes 2,925 SF for public use and 600 SF for revenue generating use.

Table 3 – Metrics for NYSTA Limited Service Area Locations

NYSTA Limited Service Area /1	Recommended SF per RFP			Total SF	2017 AADT (000's)
	Public	Revenue	Truck *		
	600	2,925	-	3,525	
	Average SF per 1,000 AADT				
Schuyler	25	120	-	145	24.305
Seneca	10	47	-	56	62.510
DeWitt	18	90	-	108	32.552
Indian Castle	26	126	-	152	23.190
<b>Average</b>	<b>17</b>	<b>82</b>	<b>-</b>	<b>99</b>	<b>35.639</b>

Source : RKG and NYSTA (2019)

## COMMUTER-FOCUSED SERVICE AREA (LEVEL 2A @ 13,005 SF)

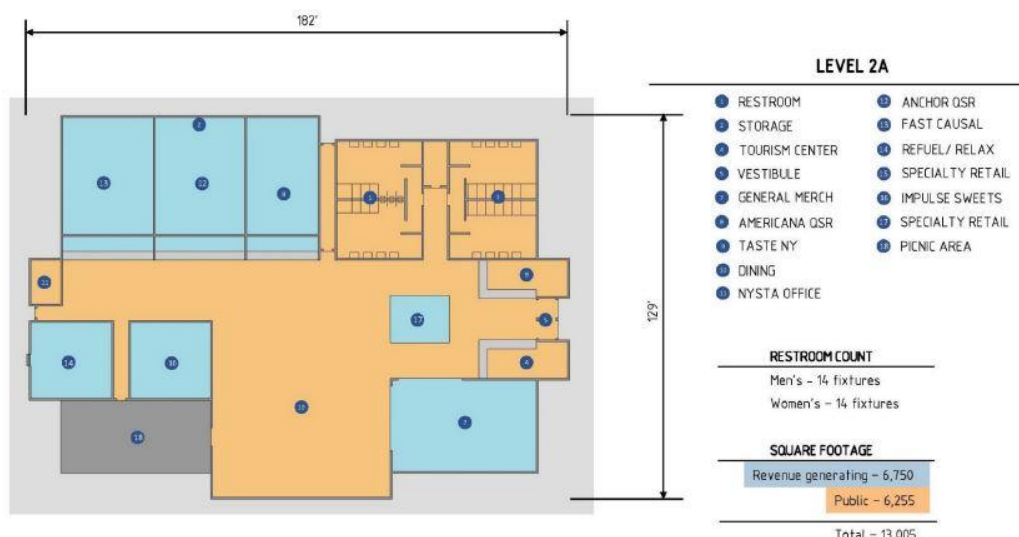


Figure 2 – Conceptual schematic of Level 2A–Commuter Focused Service Area

With all of the amenities of a Level 1, the Level 2A was developed primarily for daily commuters. Given the predominance of elongated sites along I-87, it is envisioned that drive-thru lanes could be added to better serve the “grab and go” market. Other services included in a Level 2A: variety of food, convenience store and retail options for travelers, especially those on the go and a seasonal farm market.

- The 13,005 SF footprint includes 6,255 SF for public use and 6,750 SF for revenue generating use.

Table 4 – Metrics for NYSTA Commuter-Focused Service Area Locations

NYSTA Commuter-Focused Service Area (2A)	Recommended SF per RFP			Total SF	2017 AADT (000's)
	Public	Revenue	Truck *		
	6,255	6,750	-	13,005	
	Average SF per 1,000 AADT				
Ardsley	130	141	-	271	48.040
Sloatsburg	66	71	-	137	94.688
Ulster	155	167	-	322	40.343
Malden	167	180	-	347	37.451
Ramapo	66	71	-	137	94.688
<b>Average</b>	<b>99</b>	<b>107</b>	<b>-</b>	<b>206</b>	<b>63.042</b>

Source : RKG and NYSTA (2019)



## ENHANCED SERVICE AREA (LEVEL 2B @ 15,255 SF)

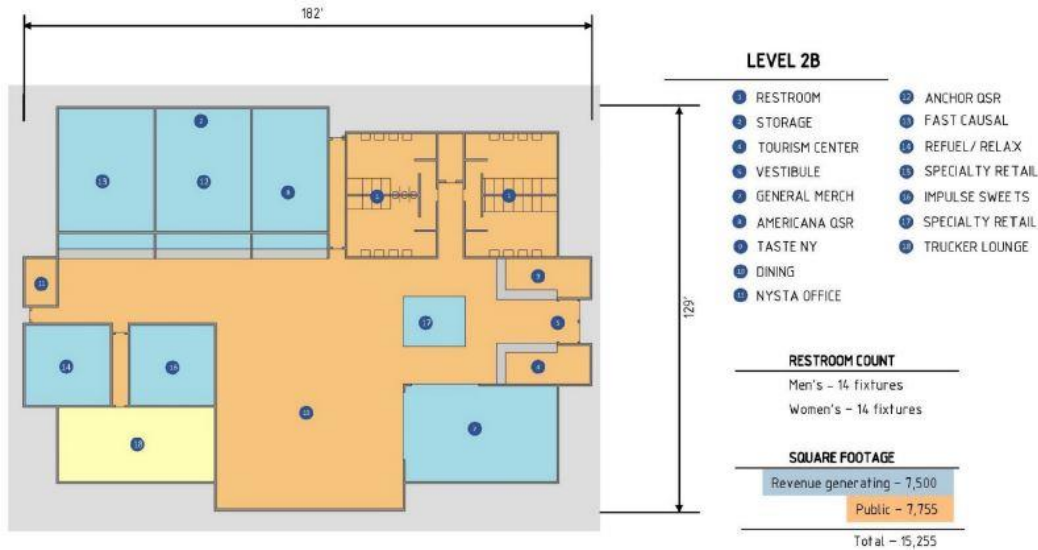


Figure 3 – Conceptual schematic of Level 2B-Enhanced Service Area

The design emphasizes a “sense of place”, celebrates travel, and encourages longer dwell times. This prototype is the closest to the current Thruway Service Areas. Where possible and acceptable to the Authority, a 1,500 square foot Truckers Lounge (\*) for professional drivers would be incorporated into the facilities with a secured and separate indoor entrance, single occupancy shower facilities, and a coin operated laundry. All other amenities as noted in Level 2A (Commuter Focused Service Area) would be incorporated.

- The 15,255 SF footprint (without the Truckers Lounge) includes 7,755 SF for public use and 7,500 SF for revenue generating use.

Table 5 - Metrics for NYSTA Enhanced Service Area Locations

NYSTA Enhanced Service Area (2B) /3	Recommended SF per RFP			Total SF	2017 AADT (000's)
	Public 7,755	Revenue 7,500	Truck * 1,500		
	Average SF per 1,000 AADT				
Pattersonville *	261	252	50	564	29.718
Iroquois	324	314	-	638	23.910
Warners	198	191	-	389	39.226
Junios Ponds	201	195	-	396	38.507
Ontario	262	253	-	515	29.649
Clarence *	181	175	35	390	42.928
Pembroke *	182	176	35	393	42.588
Scottsville	262	253	-	515	29.649
Port Byron	210	203	-	413	36.976
Mohawk	261	252	-	513	29.718
Guilderland *	97	93	19	209	80.228
<b>Average</b>	<b>202</b>	<b>195</b>	<b>39</b>	<b>436</b>	<b>38.463</b>

Source : RKG and NYSTA (2019)

## FLAGSHIP SERVICE AREA (LEVEL 3 @ 22,655 SF)

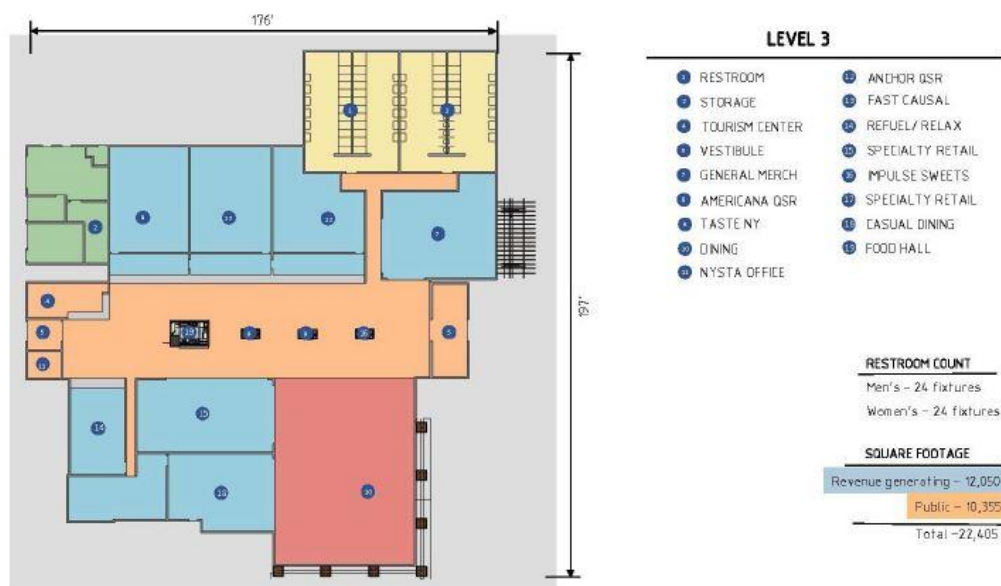


Figure 4 – Conceptual schematic of Level 3-Flagship Service Area

At over 7,000 SF larger than the Level 2B Service Areas, these Service Areas are envisioned as destination properties with the broadest selection of products and services. The prototype calls for 11,155 SF of public area and 11,500 SF of leasable tenant space for a wide range of local, regional, and nationally-recognized food, beverage and retail options. For the Level 3 Service Areas, the Authority encourages the development of an Artisan Food Hall with 2 to 4 stalls and a rotating roster of locally focused dining options.

- Designated centers include Plattekill, Angola, Modena, New Baltimore, Clifton Springs, Chittenango and Oneida.

Table 6 - Metrics for NYSTA Flagship Service Area Locations

NYSTA Flagship Service Area /4	Recommended SF per RFP			Total SF	2017 AADT (000's)
	Public	Revenue	Truck *		
	11,155	11,500	-		
	Average SF per 1,000 AADT				
Plattekill	247	255	-	503	45.080
New Baltimore	266	275	-	541	41.888
Chittenango	275	283	-	558	40.622
Angola	398	411	-	809	27.996
Clifton Springs	264	272	-	537	42.223
Oneida	382	394	-	776	29.185
Modena	247	255	-	503	45.080
Average	287	296	-	583	38.868

Source : RKG and NYSTA (2019)

## CONCLUSIONS

RKG developed an estimate of SF, by use, for the RGC, based on these metrics (Table 7):

- **High Estimate** – a total of 22,655 SF, with 11,155 SF for public use and 11,500 SF for revenue generating uses.
- **Medium Estimate** - a total of 17,426 SF, with 8,580 SF for public use and 8,846 SF for revenue generating uses.
- **Low Estimate** - a total of 11,170 SF, with 5,375 SF for public use and 5,802 SF for revenue generating uses.
- **Average Estimate** - a total of 17,086 SF, with 8,370 SF for public use and 8,716 SF for revenue generating uses.

If a Truckers Lounge for professional drivers is included an additional 1,500 SF is necessary according to the NYSTA. By comparison, if the AADT metrics for the Tamarack Welcome Center were applied to the proposed RGC, the estimated size would total 28,452 SF, which RKG considers to be aggressive for this location. Conversely, if the AADT metrics for the Hooksett (NH) Welcome Center were applied to the proposed RGC, the estimated size would total 10,857 SF, which RKG considers would be undersized for this location.

Table 7 – Estimated SF and Allocations for Proposed Ripley Gateway Center

Proposed Ripley Welcome Center	Estimated SF by Comparison			Total SF	2017 AADT (000's)
	Public	Revenue	Truck *		
As Flagship Service Area = <b>HIGH</b>	507	523	-	1,031	21.982
estimate	11,155	11,500	-	22,655	
Against FLAGSHIP with 20,000 -	390	402		793	21.982
30,000 AADT = <b>MEDIUM</b> estimate	8,580	8,846	-	17,426	
Against ALL with 20,000 - 30,000	245	264		508	21.982
AADST = <b>LOW</b> estimate	5,375	5,802	-	11,177	
<b>Average SF for RWC</b>	<b>8,370</b>	<b>8,716</b>	<b>-</b>	<b>17,086</b>	<b>na</b>

Source : RKG and NYSTA (2019)

## SOCIOECONOMICS

The population within the 30-mile market area is projected to decline by 2023, from 355,900 (2018) to 349,500 (Table 8), but nominally by less than two percent. This holds for the cohort aged 25 to 44 (typically the family/household formation years) with an 0.8 percent decline, and those aged 45 to 64 (typically in their peak earning and spending years) with a 9.1 percent decline. However, the population aged 65 and over, those in their retirement years, often with leisure time and disposable income, are projected to increase by 12.1 percent. Similarly, the number of households (2018 to 2023) within the market area are projected to decline, but also by a nominal amount of less than two percent. The median household incomes are projected to increase by between \$5,200 to \$6,200<sup>11</sup> for the selected radii, and total more than \$50,000 for each of the radii by 2023, with a median household income of more than \$56,400 at the 10-mile radius.

<sup>11</sup> Throughout this narrative much of the numeric data is presented as rounded for ease of convenience to the reader. The unrounded data appears in the various tables.

## TAPESTRY SEGMENTATION

ESRI, a leading national vendor of socioeconomic data and proprietary modeling, has developed a lifestyle classification referred to as Tapestry Segmentation(s). These classifications consider demographic, socioeconomic, spending and other lifestyle choices across households. ESRI has delineated 14 broad lifestyle segments<sup>12</sup> which offer a means of identifying and targeting market audiences, or potential customers. The top tier segments (50 percent or more of the households) at selected radii about the proposed RGC (for 2018) are presented in Table 9.<sup>13</sup>

### 10-MILE RADIUS

There is a total of 6,800 households in the 10-mile radius with the top six segments representing more than 73 percent (5,000 households) of these households.

- The greatest concentration of households (19.4 percent) is the Midlife Constants. These households are classified as primarily married couples, although with a growing share of single-person households. The median age of householders is 47 years with a median household income of \$53,200. Their lifestyle is more typically considered country as opposed to urban. These households are considered traditional rather than trendy and they are attentive to price, preferring to buy American. These households typically contribute to arts and cultural organizations and leisure activities include movies, reading, fishing and golf.
- This is followed by the Salt of the Earth households (14.6 percent) where the householder median age is 44.1 years and the median household income of \$56,300. These households are often rural, own multiple vehicles and are accustomed to long commutes for employment. Nearly two-thirds are married couples and about one-half have children living at home. Among these households, outdoor sports activities, such as fishing, boating and hunting, as well as overnight camping trips, are generally popular.
- Another 13.5 percent of the households are considered as Comfortable Empty Nesters, with a median householder age of 48.0 years and a median household income of \$75,000. These are most often “baby-boomer” households, generally married and some still with children at home. Nearly 36 percent of these households are college graduates and they are generally financially comfortable. Leisure activities often include golfing, skiing, bicycling and fitness workouts.
- The Heartland Communities segment comprises 11.1 percent of the households. The median age of householders is 42.3 years with a median household income of \$42,400. These are primarily owner households (often mortgage free) and otherwise semirural and semiretired. These households are considered budget savvy, often skeptical about

<sup>12</sup> These are further delineated into 68 neighborhood sub-markets.

<sup>13</sup> Full descriptions of these Tapestry Segments, as prepared by ESRI, are offered in the Appendix.

their financial future, but enjoy outdoor activities, community events and a more country way of life including such activities as motorcycling, hunting and fishing.

- Nearly ten percent of the households are classified as Small Town Simplicity, with a householder median age of 40.8 years and a modest median household income of \$31,500. These households are generally semirural and/or located in small towns, often including a high percentage of renters or mobile homes. These households often have strong community ties, enjoying outdoor activities including collegiate sporting events and NASCAR, per ESRI. Although often family households a growing percentage of single person households enjoy the convenience of dining out.

## 20-MILE RADIUS

There is a total of 53,600 households (2018) in the 20-mile radius, representing an increase of nearly 46,800 households over the 10-mile radius. The top seven segments in the 20-mile radius account for 52 percent (27,900 households) of the total 20-mile households.

- The greatest concentration of households (10.2 percent) are classified as Hardscrabble Road, with a median household income of \$28,200 and a median age of householder of 32.4 years. The racial and ethnic make-up of these households is generally diversified. These households often include a high percentage of renter households, generally married couples, who tend to be very cost-conscious and save money for specific purposes or special trips. As such, shopping is often in bulk and for generic brands, favoring purchases at discount stores or Internet bargains. Musical interests are diversified and include gospel as well as rap music. Sporting favorites include NASCAR, professional wrestling basketball and most televised sporting events, per ESRI.
- This Tapestry Segmentation is then followed by Comfortable Empty Nesters, as previously described, with an 8.6 percent representation or about 4,600 households.
- Traditional Living households account for 8.5 percent of the 20-mile households and are characterized with a median age of householder of 35.5 years and a median household income of \$39,300. These households include a mix of married-couples and singles, often early in their family-formation and home ownership years. While these households are often cost-conscious they are also typically brand loyal. As younger households they are tech savvy and users of the Internet, but they are also frugal in their shopping frequenting discount and convenience stores, although dining out is a frequent occurrence and outdoor activities such as fishing, and family trips are prevalent.
- These segments are then followed by Salt of the Earth (8.4 percent of the households); Midlife Constants (7.8 percent of the households); Heartland Communities (5.5 percent of the households); and, Small Town Simplicity households (3.0 percent) as all previously described.

## 30-MILE RADIUS

There are more than 142,700 households within a 30-mile radius of the proposed RGC, representing an increase of 89,100 households over the 20-mile radius. The top seven Tapestry



Segments account for almost 60.0 percent (79,500 households) of the total 30-mile households. The median household income of the top tier households, of \$48,000, is more dispersed at the 30-mile radius and marginally below that of all 30-mile households, at \$48,100. The income and household diversity at the 30-mile radius suggests, all things equal, that market area utilization and visitor ship of the proposed RGC could diminish with distance and travel times. This generally reflects one of the retail “rules of thumb” indicating that sales decay with distance and density, meaning the further a consumer must drive to meet their purchasing demands the less likely there are to do so (distance), and the further they drive the greater the alternative shopping venues and destinations (density).

A unique and frequent updating of potential events, offerings and venues at a proposed RGC could serve to lessen this dynamic.

Table 8 – Market Area Selected Socioeconomics – Proposed Ripley Gateway Center

Selected Socio-Economics at Selected Radii - Ripley, NY	10-Mile Radius						20-Mile Radius						30-Mile Radius					
	Census 2010	Estimated 2018	Projected 2023	% Δ 2010 to 2018	# Δ 2018 to 2023	% Δ 2018 to 2023	Census 2010	Estimated 2018	Projected 2023	% Δ 2010 to 2018	# Δ 2018 to 2023	% Δ 2018 to 2023	Census 2010	Estimated 2018	Projected 2023	% Δ 2010 to 2018	# Δ 2018 to 2023	% Δ 2018 to 2023
Total Population	17,464	17,228	16,916	-1.4%	-312	-1.8%	141,211	139,840	137,765	-1.0%	-2,075	-1.5%	361,347	355,927	349,521	-1.5%	-6,406	-1.8%
aged 25 to 44	3,787	3,910	3,862	3.2%	-48	-1.2%	32,354	33,446	33,344	3.4%	-102	-0.3%	83,408	84,157	83,459	0.9%	-698	-0.8%
aged 45 to 64	5,308	4,957	4,445	-6.6%	-512	-10.3%	37,526	35,472	32,423	-5.5%	-3,049	-8.6%	99,554	94,244	85,772	-5.3%	-8,472	-9.0%
aged 65 and older	2,792	3,449	3,962	23.5%	513	14.9%	19,919	24,247	27,361	21.7%	3,114	12.8%	55,325	66,064	74,039	19.4%	7,975	12.1%
Total Households	6,910	6,841	6,723	-1.0%	-118	-1.7%	54,019	53,646	52,870	-0.7%	-776	-1.4%	144,431	142,754	140,223	-1.2%	-2,531	-1.8%
owner households	5,229	5,081	5,078	-2.8%	-3	-0.1%	35,008	34,039	34,065	-2.8%	26	0.1%	95,312	91,770	91,762	-3.7%	-8	0.0%
Median HH Income	na	\$ 51,190	\$56,411	na	\$ 5,221	10.2%	na	\$ 45,041	\$51,192	na	\$ 6,151	13.7%	na	\$ 48,127	\$ 53,846	na	\$ 5,719	11.9%
Source : ESRI and RKG Associates (2019)																		

Table 9 – Market Area Top Tapestry Segmentations – Proposed Ripley Gateway Center

Tapestry Segmentation (2018) - Ripley, NY	10-Mile Radius				20-Mile Radius				30-Mile Radius			
	HH	% of Total	HH \$	% of Total	HH	% of Total	HH \$	% of Total	HH	% of Total	HH \$	% of Total
<b>Total Households</b>	<b>6,841</b>		<b>\$ 51,190</b>		<b>53,646</b>	<b>0.0%</b>	<b>\$ 45,041</b>		<b>142,754</b>		<b>\$ 48,127</b>	
Midlife Constants	1,327	19.4%	\$ 53,200	103.9%	4,184	7.8%	\$ 53,200	118.1%	13,133	9.2%	\$ 53,200	110.5%
Salt of the Earth	999	14.6%	\$ 56,300	110.0%	4,506	8.4%	\$ 56,300	125.0%	13,562	9.5%	\$ 56,300	117.0%
Comfortable Empty Nesters	924	13.5%	\$ 75,000	146.5%	4,614	8.6%	\$ 75,000	166.5%	11,991	8.4%	\$ 75,000	155.8%
Heartland Communities	759	11.1%	\$ 42,400	82.8%	2,951	5.5%	\$ 42,400	94.1%	8,708	6.1%	\$ 42,400	88.1%
Small Town Simplicity	650	9.5%	\$ 31,500	61.5%	1,609	3.0%	\$ 31,500	69.9%	4,996	3.5%	\$ 31,500	65.5%
Hardscrabble Road	342	5.0%	\$ 28,200	55.1%	5,472	10.2%	\$ 28,200	62.6%	12,420	8.7%	\$ 28,200	58.6%
Traditional Living	0	0.0%	\$ 39,300	76.8%	4,560	8.5%	\$ 39,300	87.3%	14,704	10.3%	\$ 39,300	81.7%
<b>Total these Segments</b>	<b>5,001</b>	<b>73.1%</b>	<b>\$ 51,675</b>	<b>100.9%</b>	<b>27,896</b>	<b>52.0%</b>	<b>\$ 47,736</b>	<b>106.0%</b>	<b>79,514</b>	<b>55.7%</b>	<b>\$ 47,995</b>	<b>99.7%</b>
Source : ESRI and RKG Associates (2019)												

## BUSINESS INDICATORS

Estimated counts of employees and the number of establishments, for selected industry sectors, at each of the market area radii, are offered in Table 10, noting that:

- Typically, at all radii, the greatest concentration of employment as well as the number of establishments is within the services industry sector, followed by the retail industry sector, excepting the 10-mile radius where nearly 31 percent of the employment is in the manufacturing sector.
- The greatest concentration of employment, measured in terms of average employees per establishment, is nearly 33 employee/ establishment in the manufacturing sector.
- Eating and drinking establishments, along with miscellaneous (often specialty niche) stores account for most of the retail sector establishments at all radii.
- Employment in the health sector and the education sector is generally high at all radii and the overall employees/per establishment, at the 30-mile radius, are nearly 33/per and 46/per, respectively.

Table 10 – Market Area Employment and Establishments – Proposed Ripley Gateway Center

Summary Business Indicators - Ripley, NY	Average EMP/EST at 30 - Mile	Selected Radii about NYS Thruway and Exit 61					
		10 Mile		20 Mile		30 Mile	
		EMP	EST	EMP	EST	EMP	EST
<b>TOTAL</b>	<b>15.4</b>	<b>6,736</b>	<b>718</b>	<b>86,667</b>	<b>4,799</b>	<b>206,941</b>	<b>13,430</b>
<b>Construction</b>	<b>8.6</b>	<b>160</b>	<b>52</b>	<b>4,155</b>	<b>308</b>	<b>7,360</b>	<b>852</b>
<b>Manufacturing</b>	<b>32.9</b>	<b>2,065</b>	<b>53</b>	<b>8,608</b>	<b>234</b>	<b>22,126</b>	<b>672</b>
<b>Transportation</b>	<b>13.4</b>	<b>223</b>	<b>19</b>	<b>1,668</b>	<b>132</b>	<b>4,325</b>	<b>322</b>
<b>Communications</b>	<b>15.9</b>	<b>40</b>	<b>2</b>	<b>627</b>	<b>44</b>	<b>2,072</b>	<b>130</b>
<b>Wholesale Trade</b>	<b>18.0</b>	<b>25</b>	<b>173</b>	<b>1,521</b>	<b>160</b>	<b>8,891</b>	<b>495</b>
<b>Retail Sectors</b>	<b>13.8</b>	<b>1,119</b>	<b>142</b>	<b>9,964</b>	<b>863</b>	<b>39,005</b>	<b>2,826</b>
Home Improvement	13.8	111	11	603	62	2,659	193
General Merchandise	33.9	20	4	-	34	4,005	118
Food Stores	20.7	249	18	1,936	122	6,980	337
Apparel and Accessories	9.0	6	2	84	24	1,274	142
Furniture and Furnishings	6.5	27	7	186	47	1,357	208
Eating and Drinking	17.2	433	39	3,960	250	13,309	772
Miscellaneous Store Retailers	7.6	153	40	1,380	204	5,372	705
<b>Finance and Real Estate Sectors</b>	<b>16.4</b>	<b>181</b>	<b>40</b>	<b>9,640</b>	<b>338</b>	<b>17,311</b>	<b>1,054</b>
Banks	8.4	85	15	620	75	1,787	212
Security Brokers	5.9	8	3	298	36	768	131
Insurance	41.7	36	11	7,810	78	11,340	272
Real Estate	7.8	52	11	912	149	3,416	439
<b>Service and Others</b>	<b>16.0</b>	<b>2,036</b>	<b>269</b>	<b>39,794</b>	<b>1,997</b>	<b>87,867</b>	<b>5,479</b>
Hotel and Lodging	26.4	72	19	3,338	83	4,667	177
Health	32.7	470	28	13,185	291	26,550	813
Legal	6.7	13	5	620	87	1,208	181
Education	45.7	482	17	6,050	132	15,729	344
Other	11.0	779	147	14,433	1,071	33,703	3,077
<b>Government</b>	<b>18.4</b>	<b>505</b>	<b>46</b>	<b>9,083</b>	<b>398</b>	<b>14,769</b>	<b>801</b>

Source: ESRI, Dun & Bradstreet, RKG Associates, Inc. (2019)

## EMPLOYEE SPENDING

Numerous studies conducted by the Urban Land Institute (ULI) and the International Council of Shopping Centers (ICSC), indicates that throughout the course of a year, office employees may spend nearly \$146/week or \$7,600 annually for many retail goods and services during their workday. RKG applied these metrics to the estimated 1,186 office employees<sup>14</sup> within the 10-mile radius about the proposed RGC, as presented in Table 11, noting the following:

- Overall spending demand is estimated at \$13.5 million, but this includes nearly \$4.6 million for transportation and on-line shopping.
- RKG considers that a more appropriate demand estimate, assuming such offerings are made available at the proposed RGC totals nearly \$2.4 million.
  - This includes \$900,300 for full service restaurants and \$954,400 for fast food, deli and other restaurants.
  - Sporting goods represents an additional \$189,500.
  - Entertainment expenditures add \$301,900.

While it is unreasonable to estimate that all of this potential would be realized at a proposed RGC, some portion is likely, particularly the food related opportunities if a diversified menu/cuisine and attractive food court were part of the RGC.

Table 11 – Estimated Annual Office Employee Spending Demand at the 10-Mile Radius

Mean Expenditures of all US Office Workers	Mean Weekly \$ (ICSC 2011)	Mean Weekly \$ (RKG 2018)	Annual 2018	Estimated 10-Mile Spending Demand
<b>TOTAL</b>	<b>\$ 195.22</b>	<b>\$ 219.69</b>	<b>\$ 11,423.69</b>	<b>\$ 13,548,496</b>
<b>Transportation and On-Line</b>	<b>\$ 66.03</b>	<b>\$ 74.32</b>	<b>\$ 3,864.47</b>	<b>\$ 4,583,264</b>
Transportation	\$ 35.92	\$ 40.43	\$ 2,102.25	\$ 2,493,273
On-Line	\$ 30.11	\$ 33.89	\$ 1,762.22	\$ 2,089,990
<b>Restaurants</b>	<b>\$ 26.71</b>	<b>\$ 30.07</b>	<b>\$ 1,563.81</b>	<b>\$ 1,854,684</b>
Full Service	\$ 12.97	\$ 14.60	\$ 759.08	\$ 900,272
Fast food/deli/other	\$ 13.75	\$ 15.48	\$ 804.73	\$ 954,413
<b>GAFO</b>	<b>\$ 102.47</b>	<b>\$ 115.30</b>	<b>\$ 5,995.40</b>	<b>\$ 7,110,548</b>
Department Store	\$ 7.56	\$ 8.51	\$ 442.46	\$ 524,753
Discount Store	\$ 10.63	\$ 11.96	\$ 622.13	\$ 737,848
Drug Store	\$ 6.87	\$ 7.73	\$ 402.07	\$ 476,859
Grocery Store	\$ 19.79	\$ 22.27	\$ 1,158.23	\$ 1,373,660
Clothing Store	\$ 3.80	\$ 4.28	\$ 222.40	\$ 263,765
Shoe Store	\$ 2.82	\$ 3.17	\$ 165.04	\$ 195,741
Sporting Goods Store	\$ 2.73	\$ 3.07	\$ 159.78	\$ 189,494
Electronics	\$ 6.88	\$ 7.74	\$ 402.66	\$ 477,553
Jewelry	\$ 3.36	\$ 3.78	\$ 196.65	\$ 233,224
Office Supply	\$ 6.90	\$ 7.77	\$ 403.83	\$ 478,942
Warehouse clubs	\$ 9.71	\$ 10.93	\$ 568.29	\$ 673,989
Other (florist, etc.)	\$ 3.61	\$ 4.06	\$ 211.28	\$ 250,577
Personal Care	\$ 6.03	\$ 6.79	\$ 352.91	\$ 418,553
Personal Services	\$ 3.92	\$ 4.41	\$ 229.42	\$ 272,094
Other (not classified)	\$ 3.48	\$ 3.92	\$ 203.67	\$ 241,553
Entertainment	\$ 4.35	\$ 4.90	\$ 254.59	\$ 301,941
<b>Total less Trans/On-line</b>	<b>\$ 129.08</b>	<b>\$ 145.37</b>	<b>\$ 7,559.22</b>	<b>\$ 8,965,233</b>

Source : ULI, ICSC and RKG Associates (2019)

<sup>14</sup> In this analysis taken to be those employed in communications, the finance and real estate sectors, health, legal and education.

## MARKET AREA (RESIDENT) METRICS

This section presents an analysis of potentially supportable SF for the proposed RGC considering a recapture of market area household retail sales leakage and average household spending for selected recreational uses.

## RECREATIONAL SPENDING

Estimates (2018) and projections (2023) of per household recreational spending, by radii, within the market area are presented in Table 12, noting:

- The average per household demand, at more than \$315/household, at the 10-mile radius, exceeds the other radii, reflecting in part the Tapestry Segmentation and income characteristics.
- Spending demand (2018) for ticketed events, such as theatre and concerts increase from \$309,350 at the 10-mile radius to nearly \$2.4 million at the 20-mile radius and to more than \$6.7 million at the 30-mile radius.
- Spending demand (2018) for video and arcade gaming increases from \$14,640 at the 10-mile radius to \$109,975 at the 20-mile radius and \$311,200 at the 30-mile radius.

Both, the ticketed events and the arcade/gaming spending, represent potential development opportunities or venue inclusions for a proposed RGC, particularly if something distinct such as a communal “black box” theatre for production of plays and other original works from New York artists, or retro-pinball (1970’s) machines in the arcade. Further, the recreational spending estimates, as well as the Tapestry Segmentation, suggest a target demographic that engages in outdoor sports and leisure activities. Informational kiosks at the proposed RGC, in addition to “live” employees that could assist in making reservations throughout New York could offer additional amenities to residents and visitors.

Table 12 – Market Area Recreational Spending Metrics – Proposed Ripley Gateway Center

Estimated Annual Recreational Spending by Households by Category at Selected Radii- Ripley, NY Welcome Center (I-90, Exit 61)	10-Mile Radius				20-Mile Radius				30-Mile Radius			
	Demand/HH for 2018	HH Spending 2018	HH Spending 2023	\$ Change	Demand/HH for 2018	HH Spending 2018	HH Spending 2023	\$ Change	Demand/HH for 2018	HH Spending 2018	HH Spending 2023	\$ Change
<b>Total</b>	\$ 315.58	\$ 2,158,883	\$ 2,338,036	\$ 179,154	\$ 294.11	\$ 15,777,825	\$17,673,118	\$ 1,895,293	\$ 307.97	\$ 43,963,949	\$ 48,316,150	\$ 4,352,201
<b>Tickets, Events and Gaming</b>	\$ 241.16	\$ 1,649,776	\$ 1,786,681	\$ 136,906	\$ 229.14	\$ 12,292,444	\$13,769,060	\$ 1,476,616	\$ 238.29	\$ 34,016,851	\$ 37,384,341	\$ 3,367,490
Tickets to Theatre/Operas/Concerts	\$ 45.22	\$ 309,350	\$ 335,021	\$ 25,671	\$ 43.99	\$ 2,359,888	\$ 2,643,366	\$ 283,479	\$ 47.35	\$ 6,759,402	\$ 7,428,547	\$ 669,145
Tickets to Movies/Museums/Parks	\$ 54.77	\$ 374,682	\$ 405,774	\$ 31,093	\$ 53.38	\$ 2,863,623	\$ 3,207,613	\$ 343,989	\$ 56.99	\$ 8,135,550	\$ 8,940,927	\$ 805,377
Admission to Sporting Events, exd.Trips	\$ 47.64	\$ 325,905	\$ 352,950	\$ 27,045	\$ 43.61	\$ 2,339,502	\$ 2,620,532	\$ 281,030	\$ 46.98	\$ 6,706,583	\$ 7,370,500	\$ 663,917
Fees for Recreational Lessons	\$ 91.39	\$ 625,199	\$ 677,081	\$ 51,882	\$ 86.11	\$ 4,619,457	\$ 5,174,364	\$ 554,907	\$ 84.79	\$ 12,104,112	\$ 13,302,355	\$ 1,198,244
Play Arcade Pinball/Video Games	\$ 2.14	\$ 14,640	\$ 15,855	\$ 1,215	\$ 2.05	\$ 109,974	\$ 123,185	\$ 13,211	\$ 2.18	\$ 311,204	\$ 342,011	\$ 30,808
<b>Clothing, Equipment and Other</b>	\$ 74.42	\$ 509,107	\$ 551,355	\$ 42,248	\$ 64.97	\$ 3,485,381	\$ 3,904,058	\$ 418,677	\$ 69.68	\$ 9,947,099	\$ 10,931,809	\$ 984,711
Camping Equipment	\$ 10.41	\$ 71,215	\$ 77,125	\$ 5,910	\$ 10.10	\$ 541,825	\$ 606,911	\$ 65,086	\$ 10.82	\$ 1,544,598	\$ 1,697,505	\$ 152,907
Hunting and Fishing Equipment	\$ 48.34	\$ 330,694	\$ 358,136	\$ 27,442	\$ 40.79	\$ 2,188,220	\$ 2,451,078	\$ 262,857	\$ 43.71	\$ 6,239,777	\$ 6,857,483	\$ 617,705
Winter Sports Equipment	\$ 3.93	\$ 26,885	\$ 29,116	\$ 2,231	\$ 3.84	\$ 206,001	\$ 230,746	\$ 24,746	\$ 4.14	\$ 591,002	\$ 649,508	\$ 58,506
Water Sports Equipment	\$ 4.71	\$ 32,221	\$ 34,895	\$ 2,674	\$ 4.12	\$ 221,022	\$ 247,571	\$ 26,550	\$ 4.50	\$ 642,393	\$ 705,987	\$ 63,594
Other Sports Equipment	\$ 7.03	\$ 48,092	\$ 52,083	\$ 3,991	\$ 6.12	\$ 328,314	\$ 367,752	\$ 39,438	\$ 6.51	\$ 929,329	\$ 1,021,327	\$ 91,999

Source: ESRI, Dun & Bradstreet, RKG Associates, Inc. (2019)

## RETAIL INDICATORS

All markets experience some measure of retail sales leakage, meaning a gap between the spending demand represented by local households and the sales captured by local retailers. To the extent that demand exceeds sales, then for that merchandise line, the market is a net exporter of sales, meaning residents shop elsewhere either due to convenience, shopping



preferences, price, lack of options or more basically catalog or on-line shopping. Conversely, some markets are net importers of sales indicating that the sales for a merchandise line exceed local demand, as may be the case with cluster of specialty retailers or a large general merchandiser or home improvement store.

If a market is an exporter, an opportunity may exist for additional stores to “capture” some portion of this sales leakage. To the extent that a merchandise line is a net importer of sales this may also represent new storing opportunities to shore up the market’s competitive positioning and overall strong destination location. Estimates of retail demand, sales, import/export and storing opportunities (at an estimated 25 percent recapture rate) are presented in Table 13 at each of the market area radii for the proposed RGC, noting:

- At the 10-mile radius, household (6,841 households) spending demand equates to \$148.7 million across a variety of merchandise lines. Sales are estimated to total \$93.1 million indicating net sales leakage (an exportation of sales) in the amount of nearly \$52.8 million. Most retail sectors under perform in sales relative to demand.
  - An estimate of 15 percent recapture of sales leakage, assuming new inventory and shopping venues are developed, results in an estimated supportable development of nearly 26,170 SF of retail.
  - However, RKG does not consider that much of this development would be appropriate for a welcome center, considering the target markets (locals and travelers); impractical store types such as building materials; and, stores types that may not consider a location such as this (shoe stores, as an example).
    - More appropriately for a welcome center, dining/drinking sales, specialty niche retail and specialty food products may be more appropriate. A 25 per cent recapture of these leaked sales amounts to a supportable 1,046 SF.
- At the 20-mile radius the overall consumer spending demand equates to nearly \$1.1 billion with sales of \$876.1 million indicating overall sales leakage. However, the net difference between the 10-mile and 20-mile is an estimated sales leakage of \$150.9 million.
  - At an estimated five percent recapture (retail sales diminish with distance and density) of this net difference (net additional 46,805 households) results in an estimated supportable demand of 38,500 SF.
    - Again, not all uses may be appropriate for the RGC, or otherwise find such a location compatible with their market models. As such, RKG estimates the net additional supportable retail to account for another 1,352 SF.
- At the 30-mile radius, there is a net addition of 89,108 households, with sales leakage more limited to selected merchandise lines.
  - These include \$10.9 million in lost sales for specialty food stores and \$12.1 million in specialty and niche retail.
    - A conservative one percent recapture of these sales amounts to another potential 399 SF of supportable development at the RGC.

Table 13 – Market Area Retail Indicators – Proposed Ripley Gateway Center

Estimated Retail Demand and Sales, by NAICS Sector at Selected Radii- Ripley, NY Welcome Center (I-90, Exit 61)	NAICS Code	10-Mile Radius					20-Mile Radius					30-Mile Radius				
		Demand/HH	Demand	Sales	NET 10-Mile to 20-Mile (Export) or Import	Supportable SF through Recapture (15%)	Demand/HH	Demand	Sales	NET 20-Mile to 30-Mile (Export) or Import	Supportable SF through Recapture (5%) of NET	Demand/HH	Demand	Sales	NET 20-Mile to 30-Mile (Export) or Import	Supportable SF through Recapture (1%) NET
<b>Total</b>		\$21,740	\$148,722,536	\$93,128,427	(\$52,756,315)	22,168	\$20,127	\$1,079,746,965	\$876,058,931	(\$150,931,720)	38,507	\$21,314	\$3,042,613,111	\$3,682,718,252	\$843,793,177	1,560
<b>Furniture &amp; Home Furnishings Stores</b>	442	\$979	\$6,698,820	\$3,348,757	(\$505,329)	325	\$919	\$49,277,355	\$9,462,840	(\$39,309,185)	8,061	\$979	\$139,689,478	\$116,224,450	\$16,349,487	385
Furniture Stores	4421	\$524	\$3,586,374	\$3,348,757	(\$237,617)	119	\$505	\$27,098,286	\$4,372,624	(\$22,488,045)	3,748	\$533	\$76,088,455	\$77,227,350	\$23,864,557	
Home Furnishings Stores	4422	\$455	\$3,112,446	\$2,844,734	(\$267,712)	206	\$413.43	\$22,179,068	\$5,090,216	(\$16,821,140)	4,313	\$446	\$63,601,022	\$38,997,100	(\$7,515,070)	385
<b>Electronics &amp; Appliance Stores</b>	443	\$924	\$6,318,585	\$696,669	(\$5,621,916)	2,409	\$863	\$46,270,857	\$11,321,264	(\$29,327,677)	4,190	\$927	\$132,347,994	\$81,322,655	(\$16,075,746)	459
<b>Bldg Materials, Garden Equip. &amp; Supply Stores</b>	444	\$2,022	\$13,831,079	\$9,259,959	(\$4,571,121)	2,007	\$1,751	\$93,919,508	\$69,972,638	(\$19,375,750)	4,212	\$1,850	\$264,055,811	\$370,820,237	\$130,711,297	0
Bldg Material & Supplies Dealers	4441	\$1,839	\$12,582,365	\$7,230,599	(\$5,351,766)	2,007	\$1,597	\$85,671,445	\$46,622,353	(\$33,697,326)	4,212	\$1,688	\$240,957,347	\$330,237,879	\$128,329,624	
Lawn & Garden Equip & Supply Stores	4442	\$183	\$1,248,715	\$2,029,360	\$780,645		\$154	\$8,248,064	\$23,350,285	\$14,321,576		\$162	\$23,098,464	\$40,582,358	\$2,381,673	
<b>Food &amp; Beverage Stores</b>	445	\$5,232	\$35,791,303	\$37,639,715	\$1,848,411	540	\$4,892	\$262,440,290	\$306,901,431	\$42,612,730	439	\$5,126	\$731,761,823	\$1,084,628,501	\$308,405,536	216
Grocery Stores	4451	\$4,698	\$32,136,918	\$30,303,612	(\$1,833,306)	500	\$4,413	\$236,760,439	\$281,103,306	\$46,176,173		\$4,594	\$655,794,598	\$1,007,600,932	\$307,463,467	
Specialty Food Stores	4452	\$272	\$1,863,794	\$1,728,310	(\$135,484)	40	\$246	\$13,174,559	\$8,609,353	(\$4,429,722)	439	\$267	\$38,119,165	\$22,643,906	(\$10,910,053)	216
Beer, Wine & Liquor Stores	4453	\$262	\$1,790,591	\$5,607,792	\$3,817,201		\$233	\$12,505,292	\$17,188,772	\$866,279		\$265	\$37,848,061	\$54,383,663	\$11,852,122	
<b>Health &amp; Personal Care Stores</b>	446,4461	\$2,080	\$14,228,429	\$10,623,892	(\$3,604,537)	832	\$1,820	\$97,639,879	\$89,306,763	(\$4,728,579)	364	\$1,983	\$283,140,246	\$271,960,600	(\$2,846,530)	44
<b>Clothing &amp; Clothing Accessories Stores</b>	448	\$1,649	\$11,283,772	\$744,489	(\$10,539,283)	4,871	\$1,512	\$81,125,330	\$13,601,586	(\$66,984,461)	9,158	\$1,679	\$239,744,838	\$186,576,466	\$14,355,371	9
Clothing Stores	4481	\$1,153	\$7,889,424	\$744,489	(\$7,144,935)	3,897	\$1,049	\$56,252,626	\$8,331,180	(\$40,776,511)	7,414	\$1,169	\$166,833,683	\$125,773,747	\$6,861,510	
Shoe Stores	4482	\$229	\$1,568,508	\$0	(\$1,568,508)	713	\$216	\$11,572,389	\$642,812	(\$9,361,069)	1,418	\$232	\$33,111,567	\$30,614,520	\$8,432,530	
Jewelry, Luggage & Leather Goods Stores	4483	\$267	\$1,825,840	\$0	(\$1,825,840)	261	\$248	\$13,300,315	\$4,627,594	(\$6,846,881)	326	\$279	\$39,799,589	\$30,188,199	(\$938,669)	9
<b>Sporting Goods, Hobby, Book &amp; Music Stores</b>	451	\$790	\$5,401,412	\$3,350,656	(\$2,050,756)	1,466	\$745	\$39,940,475	\$21,894,729	(\$15,994,990)	3,533	\$789	\$112,695,156	\$135,384,304	\$40,734,895	0
Sporting Goods/Hobby/Musical Instr Stores	4511	\$682	\$4,665,196	\$2,466,935	(\$2,198,261)	1,466	\$642	\$34,437,045	\$16,167,483	(\$16,071,301)	3,571	\$679	\$96,892,170	\$118,365,015	\$39,742,407	
Book, Periodical & Music Stores	4512	\$108	\$736,216	\$883,721	\$147,505		\$103	\$5,503,430	\$5,727,246	\$76,311	(38)	\$111	\$15,802,985	\$17,019,289	\$992,488	
<b>General Merchandise Stores</b>	452	\$3,958	\$27,076,172	\$2,898,435	(\$24,184,676)	7,768	\$3,784	\$202,992,331	\$137,206,371	(\$41,601,284)	5,152	\$3,916	\$559,044,165	\$748,496,376	\$255,238,171	0
Department Stores Excluding Leased Depts.	4521	\$2,746	\$18,787,781	\$0	(\$18,787,781)	5,581	\$2,677	\$143,627,886	\$111,847,537	(\$12,992,568)	1,286	\$2,736	\$390,578,874	\$490,181,700	\$131,383,175	
Other General Merchandise Stores	4529	\$1,212	\$8,288,390	\$2,891,495	(\$5,396,895)	2,188	\$1,107	\$59,364,445	\$25,358,834	(\$28,608,716)	3,866	\$1,180	\$168,465,291	\$258,314,676	\$123,854,996	
<b>Miscellaneous Store Retailers</b>	453	\$1,293	\$8,848,720	\$6,701,225	(\$2,147,495)	1,431	\$1,185	\$63,566,462	\$59,122,541	(\$2,296,426)	2,484	\$1,227	\$175,125,359	\$161,589,915	(\$9,091,522)	447
Florists	4531	\$75	\$51,5769	\$389,543	(\$126,226)	63	\$64	\$3,452,122	\$3,896,805	\$570,909		\$72	\$10,250,545	\$13,918,288	\$3,223,060	
Office Supplies, Stationery & Gift Stores	4532	\$289	\$1,976,055	\$683,723	(\$1,292,332)	881	\$266	\$14,253,673	\$4,192,869	(\$8,768,472)	1,993	\$286	\$40,847,216	\$24,969,640	(\$5,816,772)	264
Used Merchandise Stores	4533	\$108	\$737,723	\$787,140	\$49,417		\$102	\$5,479,884	\$2,925,538	(\$2,603,763)	491	\$111	\$15,885,602	\$18,941,790	\$5,610,534	
Other Miscellaneous Store Retailers	4539	\$821	\$5,619,174	\$4,840,819	(\$778,355)	486	\$753	\$40,380,783	\$48,107,328	\$8,504,900		\$758	\$108,141,996	\$103,760,197	(\$12,108,344)	183
<b>Food Services &amp; Drinking Places</b>	722	\$2,813	\$19,244,244	\$17,864,630	(\$1,379,613)	519	\$2,658	\$142,574,478	\$157,268,768	\$16,073,902	914	\$2,837	\$405,008,241	\$525,714,748	\$106,012,218	0
Restaurants	7221	\$2,576	\$17,624,249	\$16,876,557	(\$747,692)	258	\$2,440	\$130,884,225	\$122,186,717	(\$7,949,816)	914	\$2,596	\$370,630,941	\$462,159,023	\$100,225,590	
Special Food Services	7223	\$89	\$608,872	\$349,478	(\$259,394)	122	\$76	\$4,097,485	\$11,069,599	\$7,231,508		\$87	\$12,461,298	\$24,388,607	\$4,955,195	
Drinking Places - Alcoholic Beverages	7224	\$148	\$1,011,122	\$638,595	(\$372,527)	140	\$142	\$7,592,769	\$24,012,452	\$16,792,210		\$154	\$21,916,002	\$39,167,118	\$831,433	

Source: ESRI, Dun &amp; Bradstreet, RKG Associates, Inc. (2019)

## COMPETITIVE RETAIL VENUES

A sample (Table 14) of selected competitive retail centers, within the 30-mile market area of the proposed RGC indicates slightly more than 6.0 million SF of retail shopping centers and an estimated store count of 455 stores. This sample excludes what is typically referred to as freestanding retail as well as any smaller retail (not in a shopping center environment). Any potential retail development or tenants at the proposed RGC should distinguish themselves from the more typical retail.

Table 14 – Market Area Competitive Retail Venues – Proposed Ripley Gateway Center

Center Name	Miles from I-90/Exit 61	Location	Store Count	Year Built	SF
Liberty Center	20.6	Erie, PA	29	1955	229,775
Peach Street Square	22.2	Erie, PA	22	1999	716,894
Millcreek Mall	22.2	Erie, PA	175	1975	2,217,697
West Erie Plaza	22.4	Erie, PA	34	1951	225,157
Millcreek Pavilion	22.5	Erie, PA	21	1998	377,601
Erie Marketplace	22.5	Erie, PA	16	2001	278,387
Yorktown Centre	22.6	Millcreek TWP, PA	30	1989	196,728
Summit Town Center	22.7	Erie, PA	30	1990	541,318
D&F Plaza	25.3	Dunkirk, NY	25	1967	191,607
Chautauqua Mall	25.4	Lakewood, NY	65	1971	458,779
Walmart Plaza	25.7	Lakewood, NY	4	1995	223,070
Millcreek Town Center	26.5	Erie, PA	4		350,000
<b>Total or Average</b>	<b>23.38</b>		<b>455</b>	<b>1981</b>	<b>6,007,013</b>

Source : ESRI and RKG Associates (2019)

### 3. APPENDIX

#### STAKEHOLDER INPUT

This section summarizes RKG's conversations with selected area stakeholders regarding their interest in being a part of the RGC in whatever capacity possible. These responses are not intended to represent a “hard” commitment to tenanting, or occupying physical space at the RGC, but rather an openness and willingness to do so. As the analysis of the opportunities for developing an RGC advance, RKG recommends follow-up and more detailed discussions with these stakeholders.<sup>15</sup>

- National Comedy Center** - Discussions with representatives of the National Comedy Center indicated an openness to be a part of the proposed RGC. This participation could include a display and exhibit area, unspecified in size, that would highlight the National Comedy Club, increase awareness of it and potentially foster increased visitation and engagement in Jamestown. The National Comedy Center is a museum, and while they typically do not offer live comedy acts or similar venues, the representative indicated the potential of assisting in developing two or three seasonal events at the RGC, provided there was a tie-in with some other programming. As an example, if the Grape Discovery Center were a component of RGC, perhaps an open mike night could be an occasional part of the outdoor seating and hospitality of the Grape Discovery Center. Another possibility could be a tie-in with the Grape Discovery Center on a re-enactment, and possible audience participation, in the classic “*I Love Lucy*” grape stomping skit.
- The Grape Discovery Center (GDC)** – The non-profit GDC is currently situated along Route 20 in Westfield and serves as official visitor/information depot for the Lake Erie Concord Grape Belt. The GDC offers exhibits, a gift shop with a variety of crafts, apparel and other merchandise made by local artisans, and, a tasting bar with a seasonal outdoor sitting area, showcasing the “*area’s unique grape production, products and related industries...based on the agricultural, cultural and natural heritage of the area*”. AADT counts along Route 20, near the Center, are reported to be less than 3,000 autos/day.<sup>16</sup> Initial conversations with representatives of the GDC indicate an approximate 2,300 SF retail/showroom and another 1,900 SF for a tasting station. The GDC has plans for expansion which include two (2) banquet facilities at 3,500 SF and 3,600 SF; a kitchen at 810 SF; and, classroom space totaling 870 SF. The GDC is currently engaged in fund raising efforts to realize these planned additions. Relocation

<sup>15</sup> RKG was unable to contact representatives of the Chautauqua Institution, Dunkirk Historic Lighthouse and Mercyhurst North East – The Culinary and Wine Institute.

<sup>16</sup> A potential relocation to the site of the proposed Ripley Gateway Center could represent a sevenfold increase in this count.

to the RGC is a possibility, particularly if it could further the GDC's expansion plans, and depending on further discussions with the Board of Directors.

Subsequent discussions with the Grape Discovery Center, which included representatives of the Board of Directors, indicated a continued interest in being a part of the proposed RGC, and a desire to be a part of the ongoing discussion with the Chautauqua County Department of Planning & Development, noting the following:

- What is the estimated timing of the development? Relatively short-term, as within a year, or longer term? This is an important consideration as the Center continues its fundraising efforts for their planned on-site expansion.
- The GDC owns their property and has made a considerable investment (and continues to do so) in their facility. That noted, what might be any financial and/or development partnerships in either re-locating to the RGC or inclusion at the RGC a secondary location?
- Much of the GDC's ongoing income and operating revenue is represented by the on-site wine sales from New York area wineries, grape juice concentration and jams and salsas from local producers.
  - Are there any legal issues with representation at the RGC that would limit these sales, not just those New York based?<sup>17</sup>
  - In addition to the ability to sell bottled wine on the premises, are there any legal issues concerning selling wine-by-the-glass, as part of a tasting bar or as part of a sit-down (with or without food) facility?

The GDC states that *"the mission of the Concord Grape Belt Heritage Association is to preserve, revitalize, support and promote the area's unique grape production, products and related industries encouraging sustainability and economic vitality based on the agricultural, cultural and natural heritage of the area to enhance the quality of life for all residents."* As such, maintaining their existing location, as a primary outlet, could further activity along the Route 20 corridor and a secondary, albeit smaller, outlet at the RGC could serve as an introductory location. Would this be an arrangement agreeable to the Chautauqua County Department of Planning & Development, and if so, would there be any limitations or issues not previously noted?

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<sup>17</sup> Representatives of the GDC indicated that the New York Fam Winery License, which they have through legislative action, permits only sales of New York produced wine, beers and spirits at the GDC. At present, there is no mechanism for sales of non-NY produced spirits at the GDC (and presumably at the RGC).



- **Lake Erie Wine Country** – This region covers an approximate 50-mile stretching from Silver Creek, NY to Harborcreek, PA, and is representative of over 20 commercial and estate wineries. Representatives of the organization indicated that potential inclusion of these wineries at the RGC, offering a single-stop tasting venue and outlet store(s). Conversations with a representative of Lake Erie Wine Country indicated a desire to maintain some exhibit space in the proposed RGC, similar to that



Photo 6 – Display at PA center

- present in the PA Welcome Center, just to the west. Lake Erie Wine Country is in the process of rebranding and marketing itself, so inclusion as part of the RGC is a logical step forward, particularly as it may tie-in with potential entities, such as the Grape Discovery Center and providing any common display at the RGC would not adversely compete with any individual efforts among its winery membership. As the proposed RGC moves forward in the planning process, the Lake Erie Wine Country representative asked to be kept informed of the progress so further discussions could occur among all Board members.
- **The Reg Lenna Center for the Arts** - The Center provides a venue for shows, concerts, performing arts and other cultural/entertainment venues in Jamestown. The Center includes a 1,165-seat historic theatre, multi-media arts studio(s), function/event space and conference room facilities. Representatives of Reg Lenna indicated that they are more of a “presentation” company as opposed to a “production” company, and as such, while the desire for advertising and display space at the RGC is a likelihood, the production and/or sponsoring of events is not. The representative did indicate that their “typical” market or audience draw extended for northern PA to around Dunkirk and other points east in Chautauqua County.
  - **The North Shore Arts Alliance** - This is a not-for-profit co-operative engaged in furthering the awareness of and access to original works of arts, across all mediums, as offered by Chautauqua County artisans. The North Shore Alliance is sponsoring host to the annual Chautauqua-Lake Erie Art Trail, a free open-studio tour in northern Chautauqua Cuntly. The North Shore Arts alliance also helps to create and promote events at other local art galleries, arts organizations and festivals. Preliminary conversations with a representative of the Alliance indicated a desire and willingness to be a part of the proposed RGC, pending further exploratory conversations with the Board of Directors. The representative noted that as a not-for-profit, renting interior space would be problematic, but the display of art in public space perhaps less so. This would still be dependent on “wall” space available, appropriate lighting and a willingness among area artisans to offer up their art. The representative cautioned that there would be a distinction between displaying works of art and presenting works of art, such as hosting an opening or an exhibition, unless some function space were available.

- **The Dunkirk Lighthouse & Veterans Park Museum** – This facility overlooks Lake Erie, offers visitors a seasonal view<sup>18</sup> of the lake, historic insights and collections (including military memorabilia) noting that admissions fees are charged. The Museum is a not-for-profit and funds are generally limited. However, conversations with representatives of the Museum indicated their desire to maintain exhibit space (free of charge) at the RGC, particularly if part of a broader exhibit in conjunction with the National Comedy Center, as an example.
- **Johnston Estate Winery** – This family owned business is among the oldest along the Lake Erie wine Trail. Conversations with an owner indicated a willingness and desire to be a part of the proposed RGC, noting that the “first impression look and welcome” into the state leaves a bit to be desired. The winery, or as a member of the Wine Trail, could offer exhibit space, tasting space and include craft beers (so long as products are made in New York). If the RGC could serve to channel visitors along Route 5 or Route 20, thereby bypassing the Thruway for the segment to Buffalo, the region as a whole could benefit economically. Further, the RGC could strengthen the overall perception and gateway entrance into New York, possibly facilitating future developments opportunities at or near this location, such as a hotel property or outlet shopping, as examples.
- **Mercyhurst North East – The Culinary and Wine Institute** - Mercyhurst offers a curriculum in the culinary arts, which offers hands-on training including food preparation and service as part of their lunch and dinner series at the Lake View Country Club. Inclusion as part of the RGC may provide an off-campus facility offering unique dining experiences to the traveler and to the area resident and should be further explored (RKG was unable to contact representative of Mercyhurst but encourages continued efforts by the Chautauqua County Department of Planning & Development).

## SUMMARY

Area stakeholders generally expressed a desire and interest in the proposed RGC, ranging from those seeking passive exhibition and/or marketing space to those actively engaged in some level of event programming and to having a revenue generating presence. RKG recommends continued conversations with these stakeholders, by the Chautauqua County Department of Planning & Development, to keep them informed and engaged in the process and to proactively solidify their presence as the proposed RGC moves forward.

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<sup>18</sup> Closed November through April, per their website [dunkirkighthouse.com](http://dunkirkighthouse.com)

## COMPARABLE WELCOME CENTERS

As part of this analysis, RKG reviewed a sample of other welcome centers, in other communities, to learn more about their mix, operations and performance. Data was collected through on-site visits, interviews and publicly available records.

### HOOKSETT (NH) WELCOME CENTER

The Hooksett (NH) Welcome Center (HWC) is situated along I-93 in Hooksett, New Hampshire, just at the town line with Bow. The HWC is just north of Manchester and to the south of Concord. I-93 serves as a primary arterial for destinations north/south in New Hampshire, including the White Mountains.

The HWC is at Exit 11 (northbound) and is also approximately three miles south of the interchange for I-89. There are two interstate signs advertising the HWC (northbound) prior to Exit 11.

The HWC includes development for the northbound traffic and for the southbound traffic.<sup>19</sup> There is also access to the HWC (northbound) from Route 3A, a local arterial. The State of New Hampshire, Department of



Transportation, Bureau of Traffic, indicates an annual average daily traffic (AADT) count (north/southbound) of 81,000 autos (2018) between Exit 11 and I-89.

The HWC was built in 2013 on abutting parcels of State-owned land (5.51 acres and 3.49 acres). Development includes 16-pump gas facilities (Irving Fuel Pumps)<sup>20</sup>, an approximate

<sup>19</sup> Information for the Hooksett Welcome Center was collected/developed for the northbound location. The metrics of the southbound location are reported to be similar but also include a drive-thru service for food.

<sup>20</sup> Electric car chargers are also available.

24,000 SF State of New Hampshire Liquor and Wine Outlet<sup>21</sup> (accessible through the HWC) and an approximate 16,500 SF welcome center with multiple uses/tenants under one roof, in a mill building-type design, operated and managed by Granite State Hospitality, LLC<sup>22</sup> including:

- a central and open concept for seating with perhaps 25 to 30 common area tables, perhaps 1,200 Sf to 1,800 SF
- a 1950's style diner with food prepared to order and booth and counter seating (Hi-Way Diners)
- a snack and prepared foods, sandwiches section, but also with food prepared to order<sup>23</sup> (Common Man Roadside Food Courts)
- a 24-hour NH General Store with "travel" merchandise, convenience goods/groceries and New Hampshire themed gifts and novelties, alcohol and cigarette purchase are also available, as is live bait, perhaps 4,800 SF
- a recently added ice cream court (approximately 150 SF), reportedly business is slow now but anticipated to pick up in the Summer
- vending machines are available in/outside the HWC
- outdoor seating is available adjacent to the fifties style diner
- there is an out building of approximately 600 SF which houses a hand-made donut shop (New Hampshire cider donuts)<sup>24</sup>
- upper story office and meeting space (for internal use only at present)
- wi-fi is available
- numerous tv screens with local news, national news and advertisements



Photo 8 – Exterior of HWC



Photo 9 – Interior of HWC



Photo 10 – Interior of HWC



Photo 11 – Interior of HWC

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<sup>21</sup> Representatives of the NH Liquor Commission indicated that the northbound and southbound outlets were both in the top 10 in the state in terms of sales volume, at approximately \$20 million (annually) each.

<sup>22</sup> d/b/a as Common Man Roadside which manages and/or owns all of the food, general merchandise and concessions at the HWC.

<sup>23</sup> Discussions with representatives indicated that when initially opened the food was nearly all pre-made, but the market dictated that prepared to order was required.

<sup>24</sup> Conversations with staff indicated that grand opening (Labor Day weekend 2018) was extremely busy but customer activity has dropped off sharply since resulting in a shortening of hours of operation. However, the reported "busy" seasons are summer and autumn.



The State of New Hampshire operates a staffed visitor center within the HWC, numerous maps, brochures and guidebooks are also available. Conversations with staff indicated that the weekends and summer months were the busy times. The N.H. League of Craftsmen maintains a retail presence in the HWC in an area of 300 SF or slightly less and have been there since 2015, running in the red for three years but turning a small profit now.<sup>25</sup>

Staff at the League store indicated that while they carry and sell some works by local artisans<sup>26</sup> (on a consignment basis) the HWC location is more of an ambassador for other bigger facilities throughout the state. There is also banking and ATM services available at the HWC (Merrimack County Savings), approximately 1,500 SF in total. Reportedly Granite State Hospitality, LLC has a 35-year ground lease with the state of New Hampshire and is responsible for all on-site maintenance and operations (including funding of construction), excluding the NH Liquor and Wine Outlet which is maintained by the New Hampshire Liquor Commission (and construction funded by the Commission). Initial employment projections were 135 to 140 persons. Conversations with Granite State Hospitality, LLC indicate that there is an average of four million visitor annually, but this includes foot traffic to the NH Liquor and Wine Outlet, as well as the casual foot traffic from the Gas station. As such, this count does not specifically reflect visitors to the welcome center and its distinct amenities and offerings. The size of the HWC (excluding the NH Liquor and Wine Outlet) at 16,500 SF equates to approximately 200 SF per 1,000 AADT count, or if the NH Liquor and Wine Outlet is included 495 SF per 1,000 AADT.



Photo 12 – Interior of HWC



Photo 13 – Interior of HWC



Photo 15 – Interior of HWC



Photo 14 – Interior of HWC

<sup>25</sup> Reportedly, as part of the agreement between Common Man Roadside and the State, a requirement was that a non-profit be afforded space at the HWC, although a rent is applied, and the space is not gratis.

<sup>26</sup> The League represents approximately 700 to 750 artisans statewide (including parts of MA and ME).

## TAMARACK (WV) WELCOME CENTER

The Tamarack Welcome Center (TWC) is a 60,000 SF facility situated on a 104-acre tax exempt parcel<sup>27</sup>, off I-64 and I-77 (Exit 44/45) in Beckley, owned by the West Virginia Parkways, Tourism and Economic Development Authority. The TWC has been in operation since 1996. Traffic counts, for 2017, from the West Virginia DOT indicate an AADT count of 46,356 along the adjacent interstate. The TWC serves not only as a welcome center for travelers to and through the state, but also as a retail and entertainment venue supporting the greater Beckley, WV market. Full time employment at TWC is estimated at 140 to 150 persons. The size of the TWC at 60,000 SF equates to approximately 1,295 SF per 1,000 AADT count. Annual visitations are estimated at 500,000, and TWC components include:

- dining, retail amenities and an open concept courtyard
- an area dedicated to local arts and crafts, reportedly offering more than 20,000 products annually from local artisans and craftspeople
- dining featuring a Taste of West Virginia
- performing arts space (approximately 178-seats) and arts demonstration space
- conference room (added in 2003) and function space (12,000 SF)
- outdoor dining areas and relaxation areas

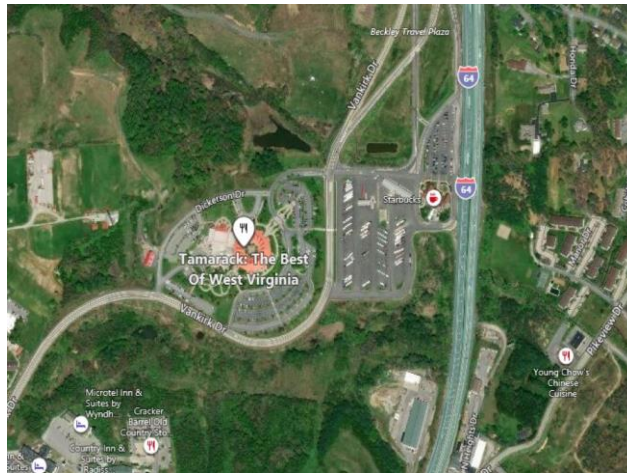


Photo 16 – Aerial view of the Tamarack (WV) Welcome Center



Figure 5 – Conceptual rendering of TWC layout and design

<sup>27</sup> Raleigh County (WV) Assessor's office parcel identification #11-19-15.



## IOWA I-80 TRUCK STOP

Although designated as a truck stop, this 100,000 SF facility, at Exit 284 from I-80, outside Walcott, IA in 1964, offers a broad diversity of services to the visitor and the traveler (reported at 5,000 visits daily), including:

- numerous fast food dining options as well as a casual sit-down restaurant (300 seats) known as the Iowa 80 Kitchen, offering buffet and homestyle cooking
- services such as dental, barber, library, chiropractor, laundry, and showers
- gift shop, small movie theater, workout room, and Sunday worship services
- an on-site trucking museum and the site of the annual (since 1979) trucker jamboree



Photo 17 – Aerial view of the Iowa I – 80 Truck Stop

The State of Iowa Department of Transportation reports a preliminary 2018 AADT of 36,500 vehicles (both ways) along I-80 at the Exit 284 location. The size of the facility at 100,000 SF equates to approximately 2,740 SF per 1,000 AADT count.

## TAPESTRY SEGMENTATIONS BY ESRI

The following present ESRI's descriptions and metrics for their lifestyle Tapestry Segments, as highlighted in this analysis.



LifeMode Group: Hometown

## Traditional Living

**Households:** 2,395,200

**Average Household Size:** 2.51

**Median Age:** 35.5

**Median Household Income:** \$39,300

12B

### WHO ARE WE?

Residents in this segment live primarily in low-density, settled neighborhoods in the Midwest. The households are a mix of married-couple families and singles. Many families encompass two generations who have lived and worked in the community; their children are likely to follow suit. The manufacturing, retail trade, and health care sectors are the primary sources of employment for these residents. This is a younger market—beginning householders who are juggling the responsibilities of living on their own or a new marriage, while retaining their youthful interests in style and fun.



### OUR NEIGHBORHOOD

- Married couples are the dominant household type, but fewer than expected from the younger age profile and fewer with children (Index 79); however, there are higher proportions of single-parent (Index 146) and single-person households (Index 112).
- Average household size is slightly lower at 2.51.
- Homes are primarily single family or duplexes in older neighborhoods, built before 1940 (Index 228).
- Most neighborhoods are located in lower-density urban clusters of metro areas throughout the Midwest and South.
- Average commuting time to work is very short (Index 22).
- Households have one or two vehicles.

### SOCIOECONOMIC TRAITS

- Over 70% have completed high school or some college.
- Unemployment is higher at 7.3% (Index 134); labor force participation is also a bit higher at 63.4%.
- Almost three quarters of households derive income from wages and salaries, augmented by Supplemental Security Income (Index 139) and public assistance (Index 152).
- Cost-conscious consumers that are comfortable with brand loyalty, unless the price is too high.
- Connected and comfortable with the Internet, they are more likely to participate in online gaming or posting pics on social media.
- TV is seen as the most trusted media.

Note: The Index represents the ratio of the segment rate to the US rate multiplied by 100. Consumer preferences are estimated from data by GfK MRI.



LifeMode Group: Hometown

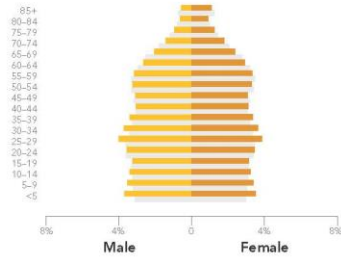
## Traditional Living



**TAPESTRY**  
SEGMENTATION  
esri.com/tapestry

### AGE BY SEX (Esri data)

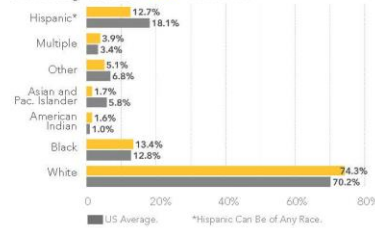
Median Age: **35.5** US: 38.2  
■ Indicates US



### RACE AND ETHNICITY (Esri data)

The Diversity Index summarizes racial and ethnic diversity. The index shows the likelihood that two persons, chosen at random from the same area, belong to different race or ethnic groups. The index ranges from 0 (no diversity) to 100 (complete diversity).

Diversity Index: **55.6** US: 64.0



### INCOME AND NET WORTH

Net worth measures total household assets (homes, vehicles, investments, etc.) less any debts, secured (e.g., mortgages) or unsecured (credit cards). Household income and net worth are estimated by Esri.

#### Median Household Income

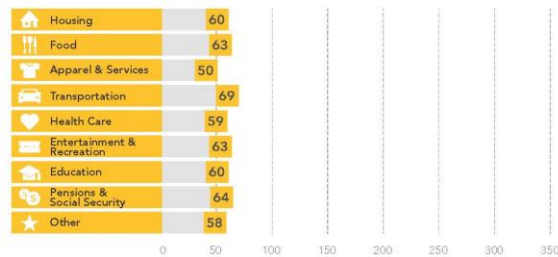


#### Median Net Worth



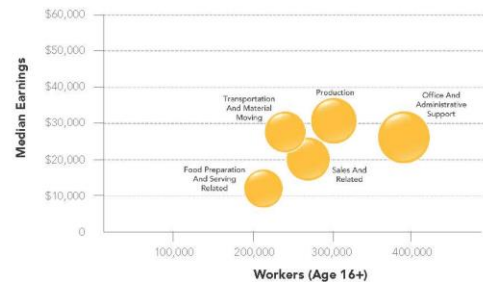
### AVERAGE HOUSEHOLD BUDGET INDEX

The index compares the average amount spent in this market's household budgets for housing, food, apparel, etc., to the average amount spent by all US households. An index of 100 is average. An index of 120 shows that average spending by consumers in this market is 20 percent above the national average. Consumer expenditures are estimated by Esri.



### OCCUPATION BY EARNINGS

The five occupations with the highest number of workers in the market are displayed by median earnings. Data from the Census Bureau's American Community Survey.





LifeMode Group: Hometown

## Traditional Living



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### MARKET PROFILE

(Consumer preferences are estimated from data by GfK MRI)

- They shop for groceries at discount stores such as Walmart supercenters; Kmart is also a favorite for apparel and sundry household and personal care products.
- Convenience stores are commonly used for fuel or picking up incidentals like lottery tickets.
- They tend to carry credit card balances, have personal loans, and pay bills in person.
- Half of households have abandoned landlines for cell phones only.
- They watch their favorite channels including ABC Family, CMT, and Game Show Network.
- They're fast food devotees.
- They enjoy outdoor activities such as fishing and taking trips to the zoo.

### HOUSING

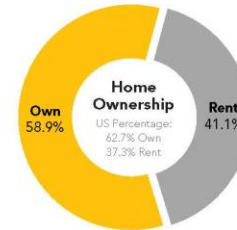
Median home value is displayed for markets that are primarily owner occupied; average rent is shown for renter-occupied markets. Tenure and home value are estimated by Esri. Housing type and average rent are from the Census Bureau's American Community Survey.



**Typical Housing:**  
Single Family

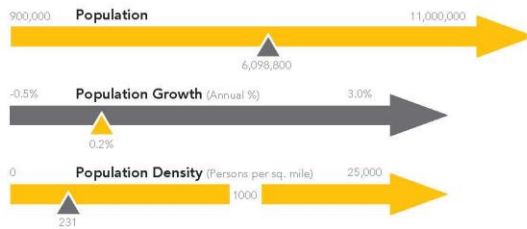
**Median Value:**  
\$83,200

US Median: \$207,300



### POPULATION CHARACTERISTICS

Total population, average annual population change since Census 2010, and average density (population per square mile) are displayed for the market relative to the size and change among all Tapestry markets. Data estimated by Esri.



### ESRI INDEXES

Esri developed three indexes to display average household wealth, socioeconomic status, and housing affordability for the market relative to US standards.





LifeMode Group: Hometown

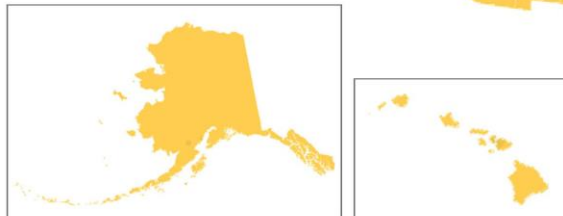
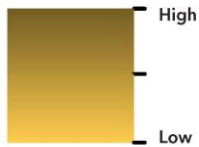
## Traditional Living



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### SEGMENT DENSITY

This map illustrates the density and distribution of the *Traditional Living* Tapestry Segment by households.



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LifeMode Group: GenXurban

## Comfortable Empty Nesters

5A

**Households:** 3,024,200

**Average Household Size:** 2.52

**Median Age:** 48.0

**Median Household Income:** \$75,000

### WHO ARE WE?

Residents in this large, growing segment are older, with nearly half of all householders aged 55 or older; many still live in the suburbs where they grew up. Most are professionals working in government, health care, or manufacturing. These Baby Boomers are earning a comfortable living and benefitting from years of prudent investing and saving. Their net worth is well above average (Index 314). Many are enjoying the transition from child rearing to retirement. They value their health and financial well-being.

### OUR NEIGHBORHOOD

- Married couples, some with children, but most without (Index 149).
- Average household size slightly higher at 2.52.
- Found throughout the suburbs and small towns of metropolitan areas, where most residents own and live in single-family detached homes (Index 142).
- Most homes built between 1950 and 1990 (Index 131).
- Households generally have one or two vehicles.

### SOCIOECONOMIC TRAITS

- Education: 36% college graduates; nearly 68% with some college education.
- Low unemployment at 4%; average labor force participation at 61%.
- Most households income from wages or salaries, but a third also draw income from investments (Index 150) and retirement (Index 159).
- *Comfortable Empty Nesters* residents physically and financially active.
- Prefer eating at home instead of dining out.
- Home maintenance a priority among these homeowners.



Note: The Index represents the ratio of the segment rate to the US rate multiplied by 100. Consumer preferences are estimated from data by QIC (MR).



LifeMode Group: GenXurban

## Comfortable Empty Nesters

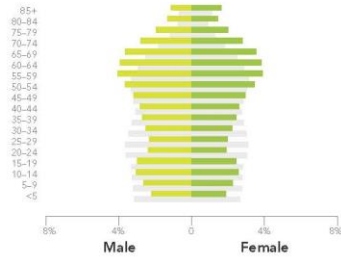


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esri.com/tapestry

### AGE BY SEX (Esri data)

Median Age: **48.0** US: 38.2

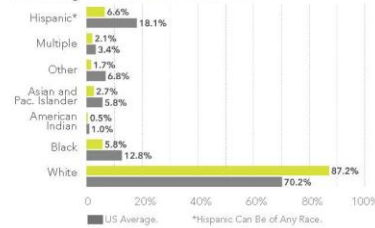
■ Indicates US



### RACE AND ETHNICITY (Esri data)

The Diversity Index summarizes racial and ethnic diversity. The index shows the likelihood that two persons, chosen at random from the same area, belong to different race or ethnic groups. The index ranges from 0 (no diversity) to 100 (complete diversity).

Diversity Index: **33.0** US: 64.0



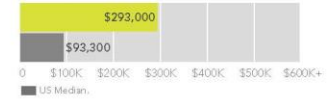
### INCOME AND NET WORTH

Net worth measures total household assets (homes, vehicles, investments, etc.) less any debts, secured (e.g., mortgages) or unsecured (credit cards). Household income and net worth are estimated by Esri.

#### Median Household Income

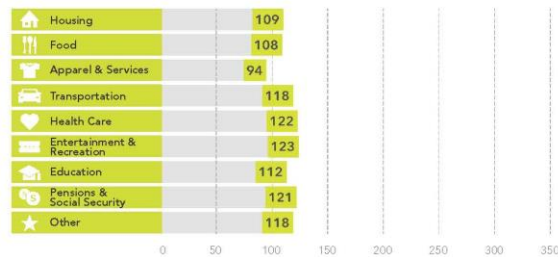


#### Median Net Worth



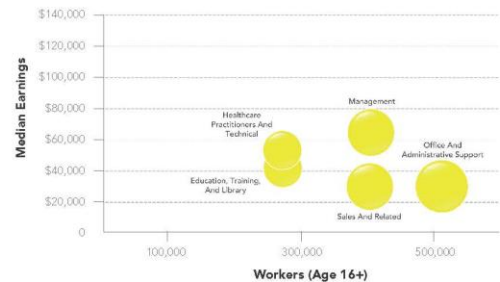
### AVERAGE HOUSEHOLD BUDGET INDEX

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### OCCUPATION BY EARNINGS

The five occupations with the highest number of workers in the market are displayed by median earnings. Data from the Census Bureau's American Community Survey.







LifeMode Group: GenXurban

## Comfortable Empty Nesters



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### MARKET PROFILE

(Consumer preferences are estimated from data by GFK MRI)

- Residents enjoy listening to sports radio or watching sports on television.
- Physically active, they play golf, ski, ride bicycles, and work out regularly.
- Spending a lot of time online isn't a priority, so most own older home computers.
- Financial portfolio includes stocks, certificates of deposit, mutual funds, and real estate.

### HOUSING

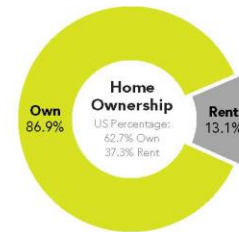
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**Typical Housing:**  
Single Family

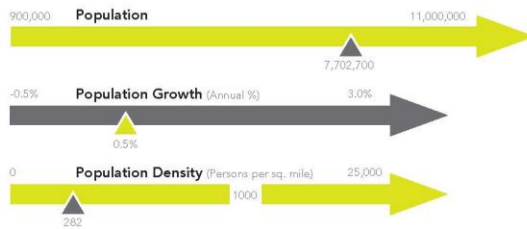
**Median Value:**  
\$203,400

US Median: \$207,300



### POPULATION CHARACTERISTICS

Total population, average annual population change since Census 2010, and average density (population per square mile) are displayed for the market relative to the size and change among all Tapestry markets. Data estimated by Esri.



### ESRI INDEXES

Esri developed three indexes to display average household wealth, socioeconomic status, and housing affordability for the market relative to US standards.





LifeMode Group: GenXurban

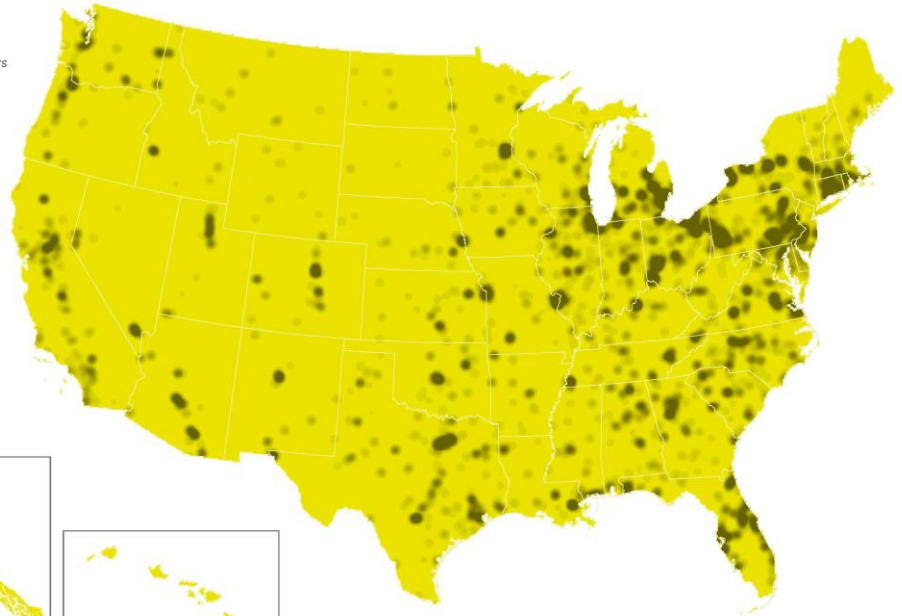
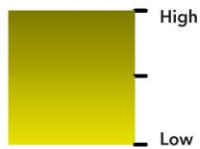
## Comfortable Empty Nesters



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### SEGMENT DENSITY

This map illustrates the density and distribution of the *Comfortable Empty Nesters* Tapestry Segment by households.



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LifeMode Group: GenXurban

## Midlife Constants

**Households:** 3,068,400

**Average Household Size:** 2.31

**Median Age:** 47.0

**Median Household Income:** \$53,200

**5E**

### WHO ARE WE?

*Midlife Constants* residents are seniors, at or approaching retirement, with below average labor force participation and above average net worth. Although located in predominantly metropolitan areas, they live outside the central cities, in smaller communities. Their lifestyle is more country than urban. They are generous, but not spendthrifts.

### OUR NEIGHBORHOOD

- Older homes (most built before 1980) found in the suburban periphery of smaller metropolitan markets.
- Primarily married couples, with a growing share of singles.
- Settled neighborhoods with slow rates of change and residents that have lived in the same house for years.
- Single-family homes, less than half still mortgaged, with a median home value of \$154,100 (Index 74).

### SOCIOECONOMIC TRAITS

- Education: 63% have a high school diploma or some college.
- Unemployment is lower in this market at 4.7% (Index 86), but so is the labor force participation rate (Index 91).
- Almost 42% of households are receiving Social Security (Index 141); 27% also receive retirement income (Index 149).
- Traditional, not trendy; opt for convenience and comfort, not cutting-edge. Technology has its uses, but the bells and whistles are a bother.
- Attentive to price, but not at the expense of quality, they prefer to buy American and natural products.
- Radio and newspapers are the media of choice (after television).



Note: The Index represents the ratio of the segment rate to the US rate multiplied by 100. Consumer preferences are estimated from data by QIC (MR).



LifeMode Group: GenXurban

## Midlife Constants

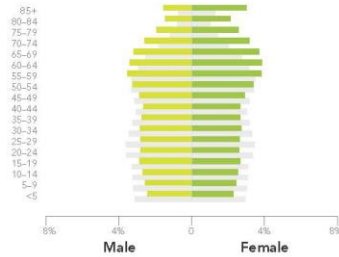


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### AGE BY SEX (Esri data)

Median Age: **47.0** US: 38.2

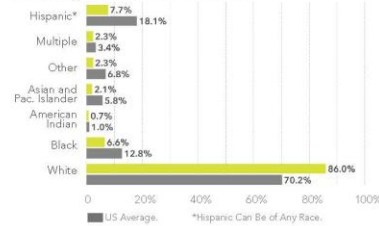
■ Indicates US



### RACE AND ETHNICITY (Esri data)

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Diversity Index: **36.2** US: 64.0



### INCOME AND NET WORTH

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#### Median Household Income

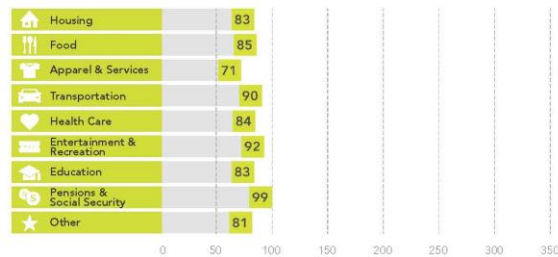


#### Median Net Worth



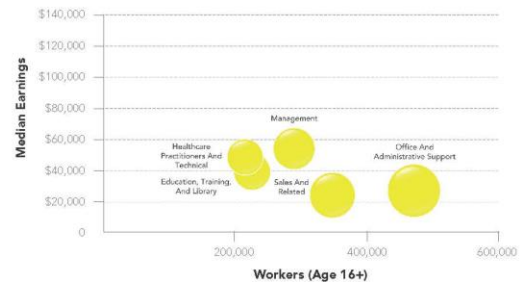
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### OCCUPATION BY EARNINGS

The five occupations with the highest number of workers in the market are displayed by median earnings. Data from the Census Bureau's American Community Survey.





LifeMode Group: GenXurban

## Midlife Constants



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### MARKET PROFILE

(Consumer preferences are estimated from data by GfK MR)

- Prefer practical vehicles like SUVs and trucks (domestic, of course).
- Sociable, church-going residents belonging to fraternal orders, veterans' clubs and charitable organizations and do volunteer work and fund-raising.
- Contribute to arts/cultural, educational, health, and social services organizations.
- DIY homebodies that spend on home improvement and gardening.
- Media preferences: country or movie channels.
- Leisure activities include movies at home, reading, fishing, and golf.

### HOUSING

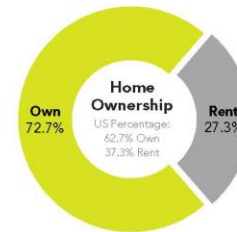
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**Typical Housing:**  
Single Family

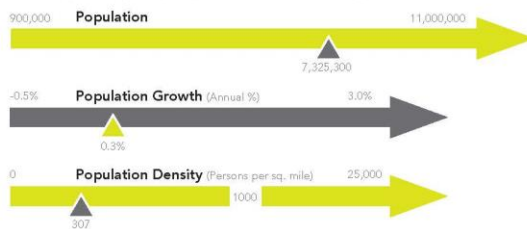
**Median Value:**  
\$154,100

US Median: \$207,300



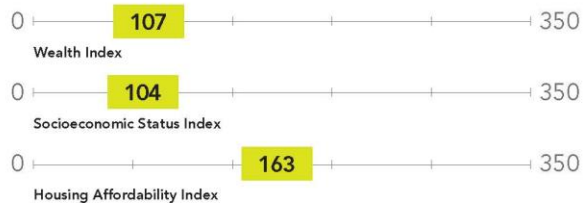
### POPULATION CHARACTERISTICS

Total population, average annual population change since Census 2010, and average density (population per square mile) are displayed for the market relative to the size and change among all Tapestry markets. Data estimated by Esri.



### ESRI INDEXES

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LifeMode Group: GenXurban

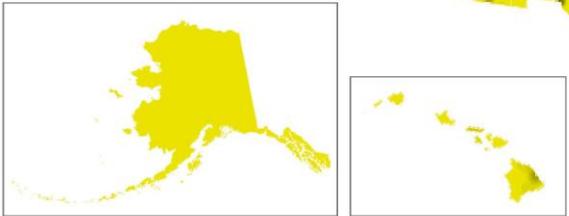
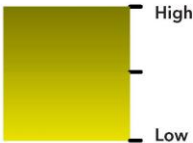
# Midlife Constants



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## SEGMENT DENSITY

This map illustrates the density and distribution of the *Midlife Constants* Tapestry Segment by households.



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LifeMode Group: Cozy Country Living

## Salt of the Earth

**Households:** 3,545,800

**Average Household Size:** 2.59

**Median Age:** 44.1

**Median Household Income:** \$56,300

**6B**

### WHO ARE WE?

*Salt of the Earth* residents are entrenched in their traditional, rural lifestyles. Citizens here are older, and many have grown children that have moved away. They still cherish family time and also tending to their vegetable gardens and preparing homemade meals. Residents embrace the outdoors; they spend most of their free time preparing for their next fishing, boating, or camping trip. The majority has at least a high school diploma or some college education; many have expanded their skill set during their years of employment in the manufacturing and related industries. They may be experts with DIY projects, but the latest technology is not their forte. They use it when absolutely necessary, but seek face-to-face contact in their routine activities.

### OUR NEIGHBORHOOD

- This large segment is concentrated in the Midwest, particularly in Ohio, Pennsylvania, and Indiana.
- Due to their rural setting, households own two vehicles to cover their long commutes, often across county boundaries.
- Home ownership rates are very high (Index 133). Single-family homes are affordable, valued at 25 percent less than the national market.
- Nearly two in three households are composed of married couples; less than half have children at home.

### SOCIOECONOMIC TRAITS

- Steady employment in construction, manufacturing, and related service industries.
- Completed education: 40% with a high school diploma only.
- Household income just over the national median, while net worth is nearly double the national median.
- Spending time with family their top priority.
- Cost-conscious consumers, loyal to brands they like, with a focus on buying American.
- Last to buy the latest and greatest products.
- Try to eat healthy, tracking the nutrition and ingredients in the food they purchase.



Note: The Index represents the ratio of the segment rate to the US rate multiplied by 100. Consumer preferences are estimated from data by QIC (MR).





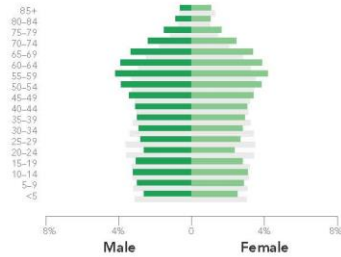
LifeMode Group: Cozy Country Living  
**Salt of the Earth**



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#### AGE BY SEX (Esri data)

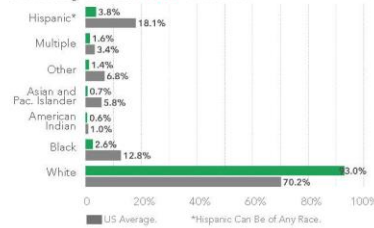
Median Age: **44.1** US: 38.2  
■ Indicates US



#### RACE AND ETHNICITY (Esri data)

The Diversity Index summarizes racial and ethnic diversity. The index shows the likelihood that two persons, chosen at random from the same area, belong to different race or ethnic groups. The index ranges from 0 (no diversity) to 100 (complete diversity).

Diversity Index: **19.8** US: 64.0



#### INCOME AND NET WORTH

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##### Median Household Income

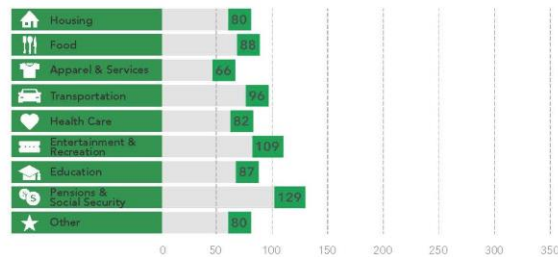


##### Median Net Worth



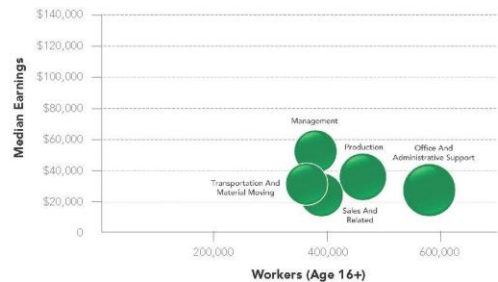
#### AVERAGE HOUSEHOLD BUDGET INDEX

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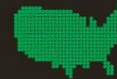
#### OCCUPATION BY EARNINGS

The five occupations with the highest number of workers in the market are displayed by median earnings. Data from the Census Bureau's American Community Survey.





LifeMode Group: Cozy Country Living  
**Salt of the Earth**



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## MARKET PROFILE

(Consumer preferences are estimated from data by GfK MRI)

- Outdoor sports and activities, such as fishing, boating, hunting, and overnight camping trips are popular.
- To support their pastimes, truck ownership is high; many also own an ATV.
- They own the equipment to maintain their lawns and tend to their vegetable gardens.
- Residents often tackle home remodeling and improvement jobs themselves.
- Due to their locale, they own satellite dishes, and have access to high speed internet connections like DSL.
- These conservative consumers prefer to conduct their business in person rather than online. They use an agent to purchase insurance.

## HOUSING

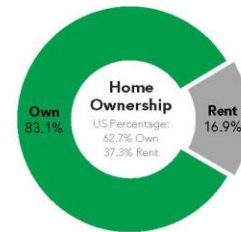
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**Typical Housing:**  
Single Family

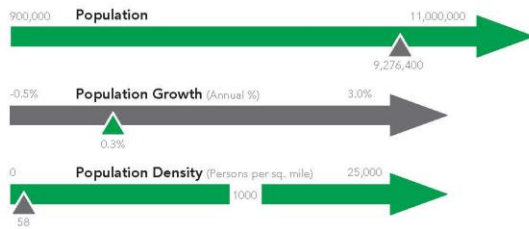
**Median Value:**  
\$154,300

US Median: \$207,300



## POPULATION CHARACTERISTICS

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## ESRI INDEXES

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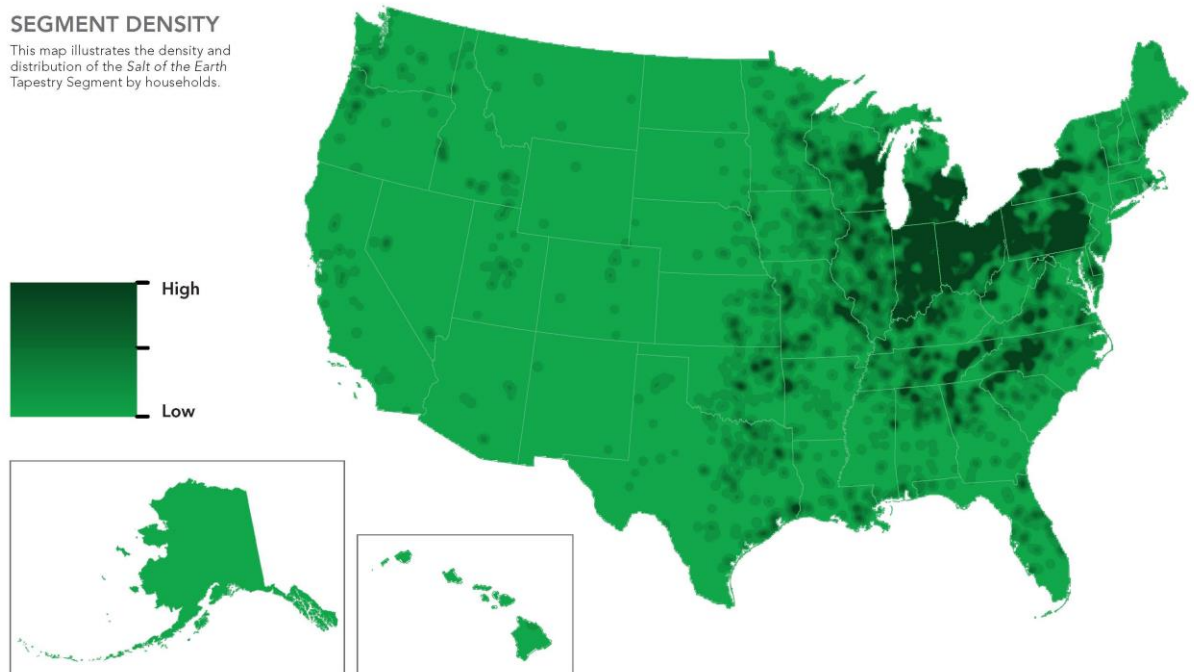
LifeMode Group: Cozy Country Living  
**Salt of the Earth**



**TAPESTRY**  
SEGMENTATION  
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#### SEGMENT DENSITY

This map illustrates the density and distribution of the *Salt of the Earth* Tapestry Segment by households.



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LifeMode Group: Cozy Country Living

## Heartland Communities

**Households:** 2,850,600

**Average Household Size:** 2.39

**Median Age:** 42.3

**Median Household Income:** \$42,400

**6F**

### WHO ARE WE?

Well settled and close-knit, *Heartland Communities* are semirural and semiretired. These older householders are primarily homeowners, and many have paid off their mortgages. Their children have moved away, but they have no plans to leave their homes. Their hearts are with the country; they embrace the slower pace of life here but actively participate in outdoor activities and community events. Traditional and patriotic, these residents support their local businesses, always buy American, and favor domestic driving vacations over foreign plane trips.



### OUR NEIGHBORHOOD

- Rural communities or small towns are concentrated in the Midwest, from older Rustbelt cities to the Great Plains.
- Distribution of household types is comparable to the US, primarily (but not the majority) married couples, more with no children, and a slightly higher proportion of singles (Index 112) that reflects the aging of the population.
- Residents own modest, single-family homes built before 1970.
- They own one or two vehicles; commutes are short (Index 82).

### SOCIOECONOMIC TRAITS

- Retirees in this market depress the average labor force participation rate to less than 60% (Index 94), but the unemployment rate is comparable to the US.
- More workers are white collar than blue collar; more skilled than unskilled.
- The rural economy of this market provides employment in the manufacturing, construction, utilities, healthcare, and agriculture industries.
- These are budget savvy consumers; they stick to brands they grew up with and know the price of goods they purchase. Buying American is important.
- Daily life is busy, but routine. Working on the weekends is not uncommon.
- Residents trust TV and newspapers more than any other media.
- Skeptical about their financial future, they stick to community banks and low-risk investments.

Note: The Index represents the ratio of the segment rate to the US rate multiplied by 100. Consumer preferences are estimated from data by GfK, MRI.



LifeMode Group: Cozy Country Living  
**Heartland Communities**

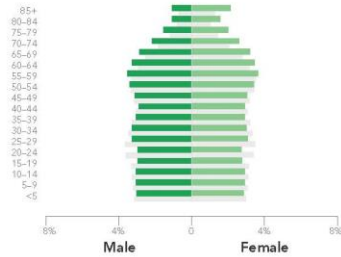


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**AGE BY SEX** (Esri data)

Median Age: **42.3** US: 38.2

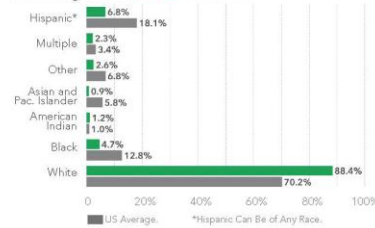
■ Indicates US



**RACE AND ETHNICITY** (Esri data)

The Diversity Index summarizes racial and ethnic diversity. The index shows the likelihood that two persons, chosen at random from the same area, belong to different race or ethnic groups. The index ranges from 0 (no diversity) to 100 (complete diversity).

Diversity Index: **31.5** US: 64.0



**INCOME AND NET WORTH**

Net worth measures total household assets (homes, vehicles, investments, etc.) less any debts, secured (e.g., mortgages) or unsecured (credit cards). Household income and net worth are estimated by Esri.

**Median Household Income**

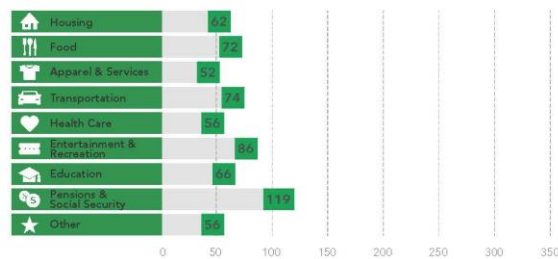


**Median Net Worth**



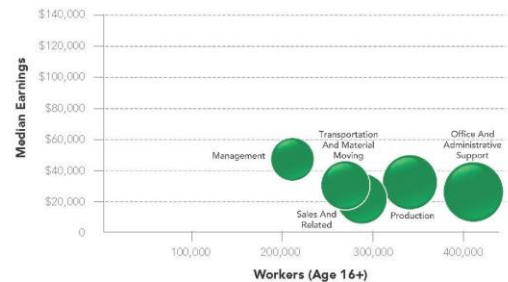
**AVERAGE HOUSEHOLD BUDGET INDEX**

The index compares the average amount spent in this market's household budgets for housing, food, apparel, etc., to the average amount spent by all US households. An index of 100 is average. An index of 120 shows that average spending by consumers in this market is 20 percent above the national average. Consumer expenditures are estimated by Esri.



**OCCUPATION BY EARNINGS**

The five occupations with the highest number of workers in the market are displayed by median earnings. Data from the Census Bureau's American Community Survey.

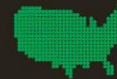






LifeMode Group: Cozy Country Living

## Heartland Communities



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### MARKET PROFILE

(Consumer preferences are estimated from data by GfK MRI)

- Traditional in their ways, residents of *Heartland Communities* choose to bank and pay their bills in person and purchase insurance from an agent.
- Most have high-speed Internet access at home or on their cell phone but aren't ready to go paperless.
- Many residents have paid off their home mortgages but still hold auto loans and student loans. Interest checking accounts are common.
- To support their local community, residents participate in public activities.
- Home remodeling is not a priority, but homeowners do tackle necessary maintenance work on their cherished homes. They have invested in riding lawn mowers to maintain their larger yards.
- They enjoy country music and watch CMT.
- Motorcycling, hunting, and fishing are popular; walking is the main form of exercise.
- To get around these semirural communities, residents prefer domestic trucks or SUVs.

### HOUSING

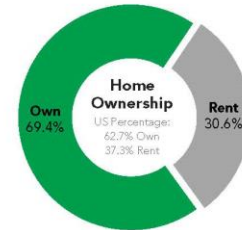
Median home value is displayed for markets that are primarily owner occupied; average rent is shown for renter-occupied markets. Tenure and home value are estimated by Esri. Housing type and average rent are from the Census Bureau's American Community Survey.



**Typical Housing:**  
Single Family

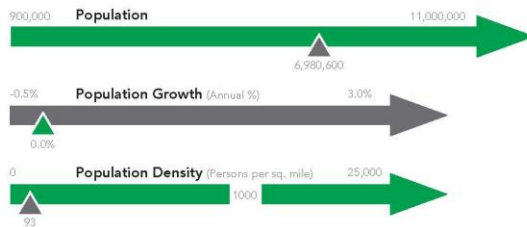
**Median Value:**  
\$95,700

US Median: \$207,300



### POPULATION CHARACTERISTICS

Total population, average annual population change since Census 2010, and average density (population per square mile) are displayed for the market relative to the size and change among all Tapestry markets. Data estimated by Esri.



### ESRI INDEXES

Esri developed three indexes to display average household wealth, socioeconomic status, and housing affordability for the market relative to US standards.





LifeMode Group: Cozy Country Living

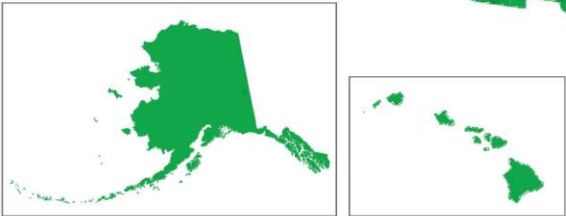
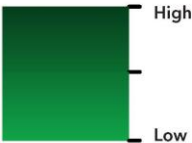
# Heartland Communities



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## SEGMENT DENSITY

This map illustrates the density and distribution of the Heartland Communities Tapestry Segment by households.



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LifeMode Group: Middle Ground

## Hardscrabble Road



**Households:** 1,507,700

**Average Household Size:** 2.66

**Median Age:** 32.4

**Median Household Income:** \$28,200

### WHO ARE WE?

*Hardscrabble Road* neighborhoods are in urbanized areas within central cities, with older housing, located chiefly in the Midwest and South. This slightly smaller market is primarily a family market, married couples (with and without children) and single parents. Younger, highly diverse (with higher proportions of black, multiracial, and Hispanic populations), and less educated, they work mainly in service, manufacturing, and retail trade industries. Unemployment is high (almost twice the US rate), and median household income is half the US median. Almost 1 in 3 households have income below the poverty level. 60% of householders are renters, living primarily in single-family homes, with a higher proportion of dwellings in 2–4 unit buildings. This market is struggling to get by.



### OUR NEIGHBORHOOD

- Renters: About three-fifths of households.
- Primarily family households, married couples with or without children, single parents (Index 203), and multigenerational households (Index 137).
- Primarily single-family homes (61%), with a higher proportion of dwellings in 2–4 unit buildings (Index 225).
- Older housing, built before 1960 (59%), with a higher proportion built in the 1940s (Index 215) or earlier (Index 257).
- Almost four-fifths of owned homes valued under \$100,000 (more than 3.5 times the US).
- Higher percentage of vacant housing units at 18% (Index 155).
- Most households with 1 or 2 vehicles (71%), but 19% have no vehicle (Index 204).

### SOCIOECONOMIC TRAITS

- Education completed: 38% with a high school diploma only (Index 137); 28% with some college or an associate's degree (Index 97).
- Unemployment rate is higher at 11.2%, almost twice the US rate.
- Labor force participation rate is lower at 57.1%.
- Wages and salaries are the primary source of income for 70% of households, with contributions from Supplemental Security Income for 12% (Index 232) and public assistance for 7% (Index 254).
- These cost-conscious consumers purchase sale items in bulk and buy generic over name brands.
- They tend to save money for a specific purpose.

Note: The Index represents the ratio of the segment rate to the US rate multiplied by 100. Consumer preferences are estimated from data by QIC (MR).



LifeMode Group: Middle Ground

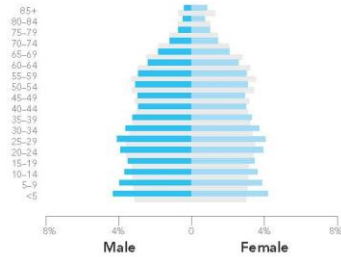
# Hardscrabble Road



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## AGE BY SEX (Esri data)

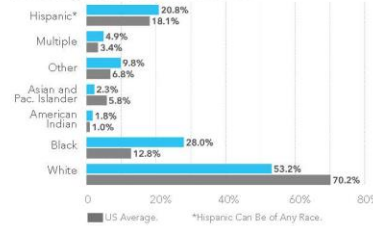
Median Age: **32.4** US: 38.2  
■ Indicates US



## RACE AND ETHNICITY (Esri data)

The Diversity Index summarizes racial and ethnic diversity. The index shows the likelihood that two persons, chosen at random from the same area, belong to different race or ethnic groups. The index ranges from 0 (no diversity) to 100 (complete diversity).

Diversity Index: **75.7** US: 64.0



## INCOME AND NET WORTH

Net worth measures total household assets (homes, vehicles, investments, etc.) less any debts, secured (e.g., mortgages) or unsecured (credit cards). Household income and net worth are estimated by Esri.

### Median Household Income

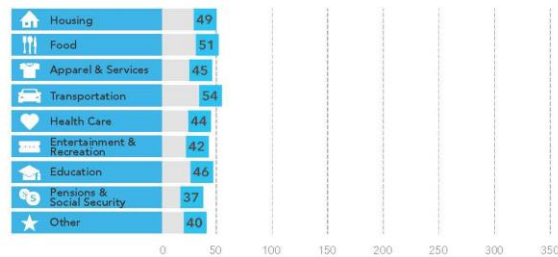


### Median Net Worth



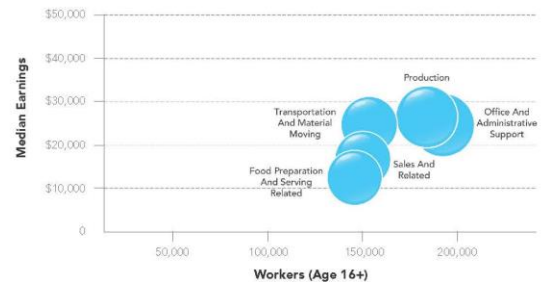
## AVERAGE HOUSEHOLD BUDGET INDEX

The index compares the average amount spent in this market's household budgets for housing, food, apparel, etc., to the average amount spent by all US households. An index of 100 is average. An index of 120 shows that average spending by consumers in this market is 20 percent above the national average. Consumer expenditures are estimated by Esri.



## OCCUPATION BY EARNINGS

The five occupations with the highest number of workers in the market are displayed by median earnings. Data from the Census Bureau's American Community Survey.





LifeMode Group: Middle Ground

## Hardscrabble Road



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### MARKET PROFILE

(Consumer preferences are estimated from data by GfK MRI)

- Little extra money to invest in retirement savings plans, stocks, or bonds.
- For those with young children at home, watching Disney Channel, Cartoon Network, and Nickelodeon on TV is popular; diapers, baby food, and children's clothing are priority expenditures.
- Favor shopping at their local discount store, search for bargains on the Internet, or purchasing from in-home sales representatives.
- Read parenting and health magazines.
- Watch programs on BET, VH1, and Game Show Network.
- Prefer to listen to gospel, R&B, rap, and hip-hop music.
- Like to listen to sports on the radio and watch on TV. Favorite sports include NASCAR racing, professional wrestling, and basketball.

### HOUSING

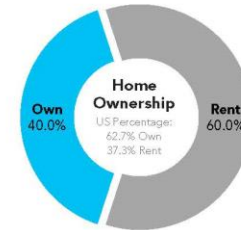
Median home value is displayed for markets that are primarily owner occupied; average rent is shown for renter-occupied markets. Tenure and home value are estimated by Esri. Housing type and average rent are from the Census Bureau's American Community Survey.



**Typical Housing:**  
Single Family

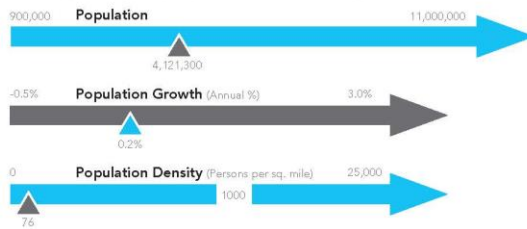
**Average Rent:**  
\$710

US Average: \$1,038



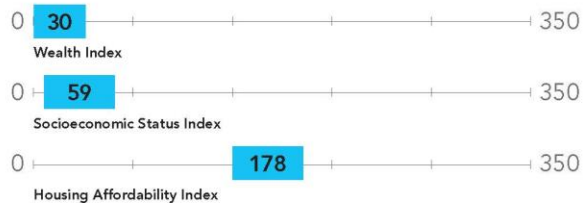
### POPULATION CHARACTERISTICS

Total population, average annual population change since Census 2010, and average density (population per square mile) are displayed for the market relative to the size and change among all Tapestry markets. Data estimated by Esri.



### ESRI INDEXES

Esri developed three indexes to display average household wealth, socioeconomic status and housing affordability for the market relative to the US.





LifeMode Group: Middle Ground

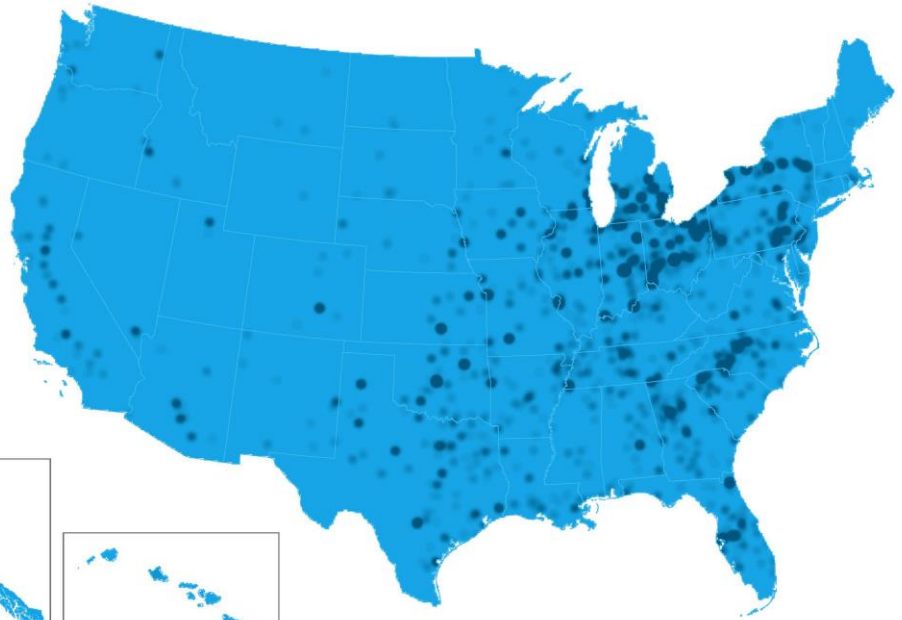
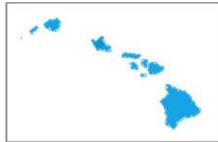
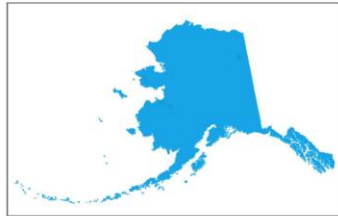
## Hardscrabble Road



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### SEGMENT DENSITY

This map illustrates the density and distribution of the *Hardscrabble Road* Tapestry Segment by households.



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## LifeMode Group: Hometown Small Town Simplicity

12C

**Households:** 2,305,700

**Average Household Size:** 2.26

**Median Age:** 40.8

**Median Household Income:** \$31,500

### WHO ARE WE?

*Small Town Simplicity* includes young families and senior householders that are bound by community ties. The lifestyle is down-to-earth and semirural, with television for entertainment and news, and emphasis on convenience for both young parents and senior citizens. Residents embark on pursuits including online computer games, renting movies, indoor gardening, and rural activities like hunting and fishing. Since 1 in 4 households is below poverty level, residents also keep their finances simple—paying bills in person and avoiding debt.

### OUR NEIGHBORHOOD

- They reside in small towns or semirural neighborhoods, mostly outside metropolitan areas.
- Homes are a mix of older single-family houses (61%), apartments, and mobile homes.
- Half of all homes are owner-occupied (Index 79).
- Median home value of \$92,300 is about half the US median.
- Average rent is \$639 (Index 62).
- This is an older market, with half of the householders aged 55 years or older, and predominantly single-person households (Index 139).

### SOCIOECONOMIC TRAITS

- Education: 67% with high school diploma or some college.
- Unemployment higher at 7.7% (Index 141).
- Labor force participation lower at 52% (Index 83), which could result from lack of jobs or retirement.
- Income from wages and salaries (Index 83), Social Security (Index 133) or retirement (Index 106), increased by Supplemental Security Income (Index 183).
- Price-conscious consumers that shop accordingly, with coupons at discount centers.
- Connected, but not to the latest or greatest gadgets; keep their landlines.
- Community-orientated residents; more conservative than middle-of-the-road.
- Rely on television or newspapers to stay informed.



Note: The Index represents the ratio of the segment rate to the US rate multiplied by 100. Consumer preferences are estimated from data by CIR/IPS.





LifeMode Group: Hometown

## Small Town Simplicity

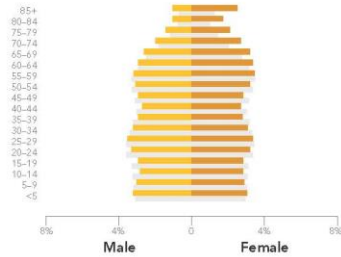


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### AGE BY SEX (Esri data)

Median Age: **40.8** US: 38.2

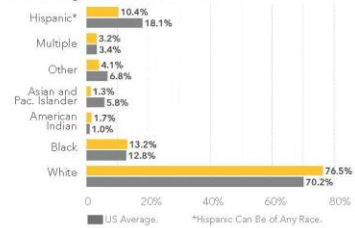
■ Indicates US



### RACE AND ETHNICITY (Esri data)

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Diversity Index: **51.0** US: 64.0



### INCOME AND NET WORTH

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#### Median Household Income

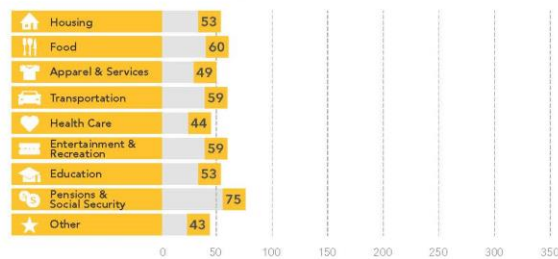


#### Median Net Worth



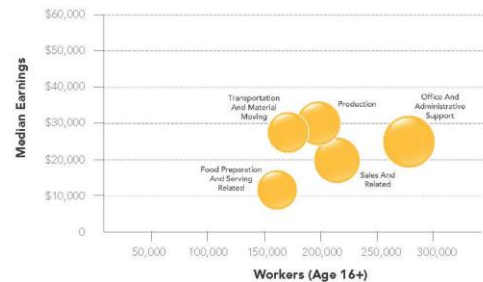
### AVERAGE HOUSEHOLD BUDGET INDEX

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### OCCUPATION BY EARNINGS

The five occupations with the highest number of workers in the market are displayed by median earnings. Data from the Census Bureau's American Community Survey.







LifeMode Group: Hometown

## Small Town Simplicity



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### MARKET PROFILE

(Consumer preferences are estimated from data by GfK MRI)

- *Small Town Simplicity* features a semirural lifestyle, complete with trucks and SUVs (domestic, of course), ATVs, and vegetable gardens.
- Residents enjoy outdoor activities like hunting and fishing as well as watching NASCAR and college football and basketball on TV.
- A large senior population visit doctors and health practitioners regularly.
- However, a largely single population favors convenience over cooking—frozen meals and fast food.
- Home improvement is not a priority, but vehicle maintenance is.

### HOUSING

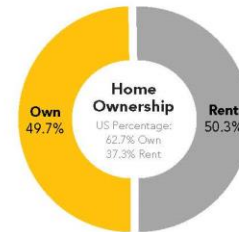
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**Typical Housing:**  
Single Family

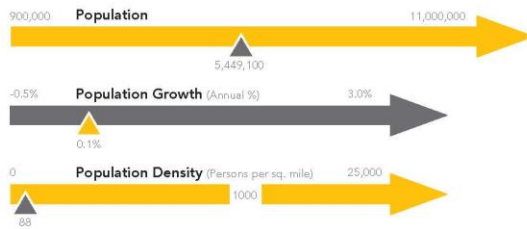
**Median Value:**  
\$92,300

US Median: \$207,300



### POPULATION CHARACTERISTICS

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### ESRI INDEXES

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LifeMode Group: Hometown

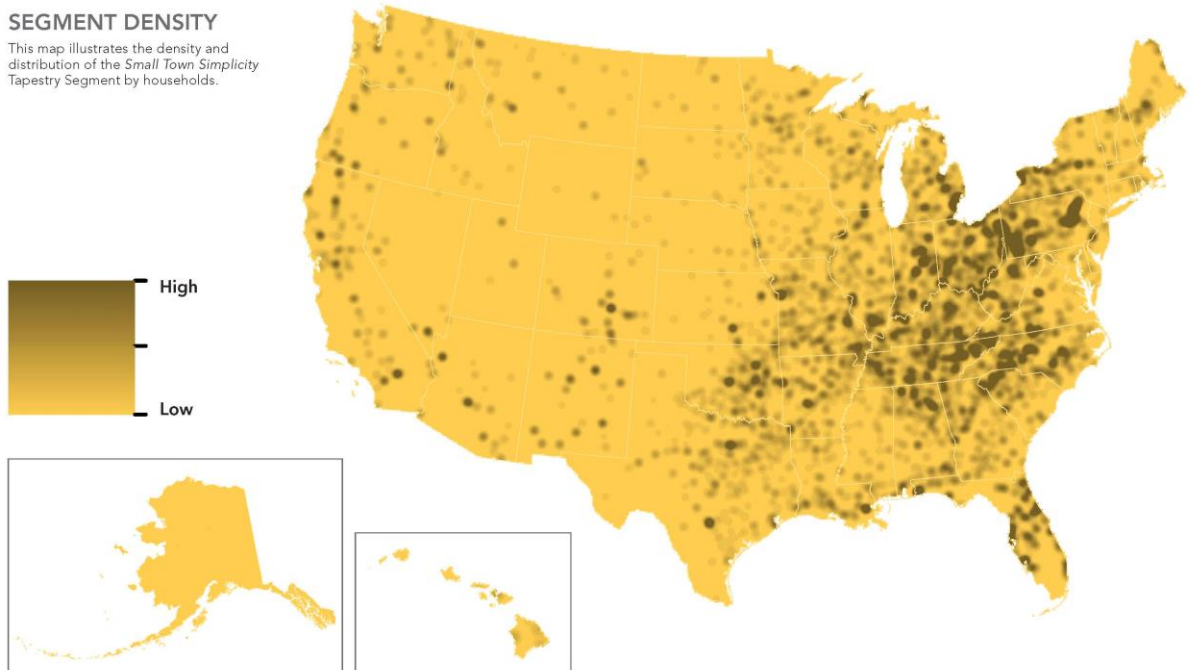
## Small Town Simplicity



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### SEGMENT DENSITY

This map illustrates the density and distribution of the *Small Town Simplicity* Tapestry Segment by households.



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