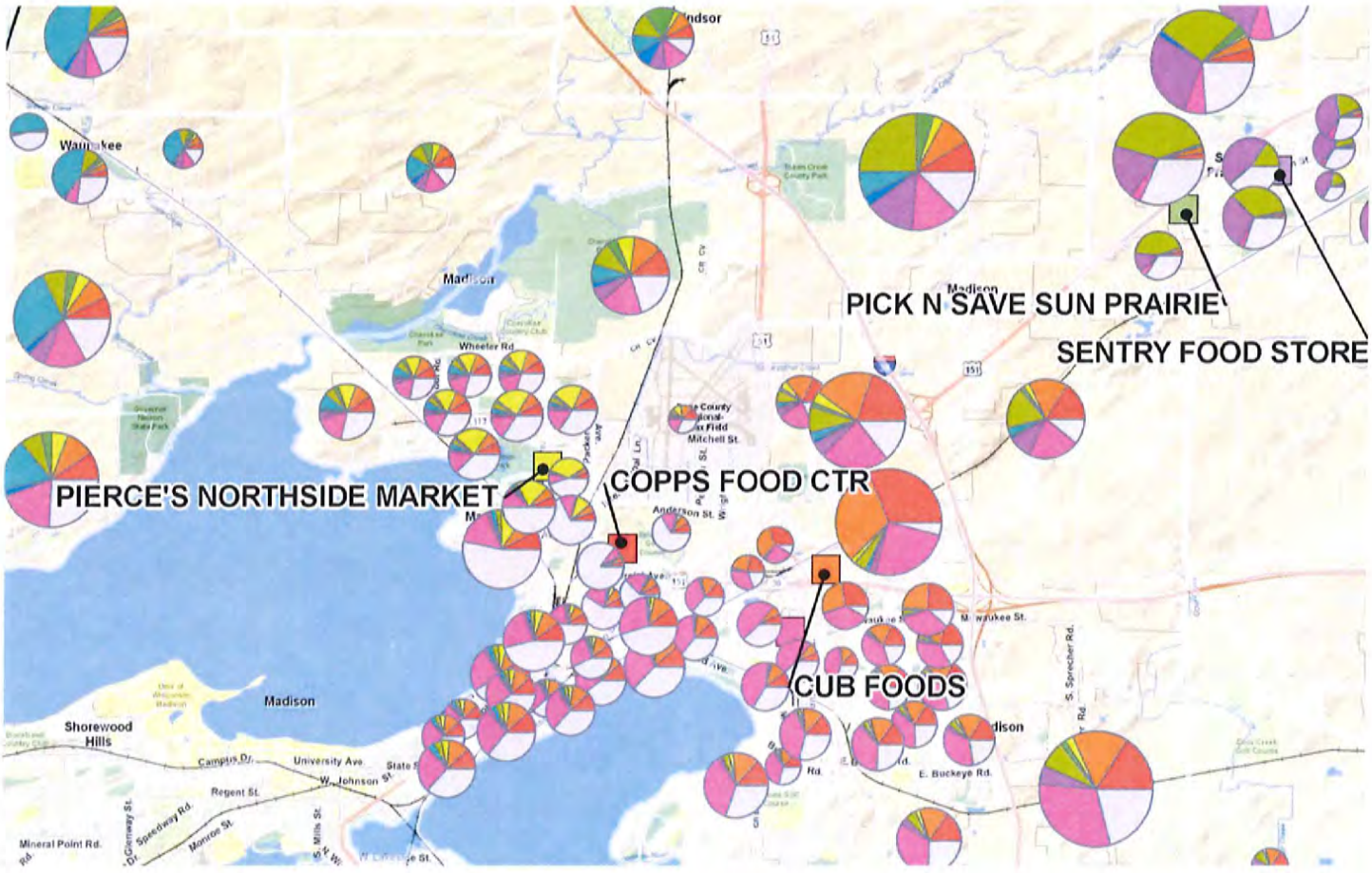
City of Madison

Northside Market Analysis



R.A. Smith National, Inc.

November 2008

Northside Market Analysis

City of Madison, Wisconsin

This Northside Market Analysis was prepared in 2008 by **R.A. Smith National, Inc.**, and is intended to provide guidance to the City of Madison in preparation of the Northport-Warner Park-Sherman Neighborhood Plan. The market analysis addresses existing conditions and the potential for residential, retail and services, office, and industrial uses within the area.

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INTRODUCTION

The City of Madison is currently in the process of updating its plan for the Northport – Warner Park – Sherman Neighborhood. R.A. Smith National, Inc., was retained by the City to prepare a market analysis that assesses current conditions and opportunities for retail, residential, office, and industrial uses in the neighborhood area, in order to prepare a well-informed plan. This area is referred to as the Northside study area, or simply "Northside" in this analysis. It is depicted in Map 1.

This report documents observations of the consultant team, along with data and analysis, including the several market analyses for alternative uses within the neighborhood. It includes an opinion of the uses considered most likely to be successful within the area, along with recommendations concerning actions the City or others may take to enhance the viability of these uses.

This is a neighborhood that is very little known and is cut off from the rest of the City – or so it is perceived. In actuality, several good roads connect the neighborhood to Madison's core and to developing areas on the periphery. Their design does not facilitate patronage of area businesses, though. A lack of distinguishing neighborhood features, few anchor uses, and the diverse character of the neighborhood's built environment probably contribute significantly to potential customers' lack of knowledge of the area. With mostly neighborhood-oriented retail and services in the Northside study area, and much stronger competition nearby, there is little incentive for outsiders to travel to the neighborhood.

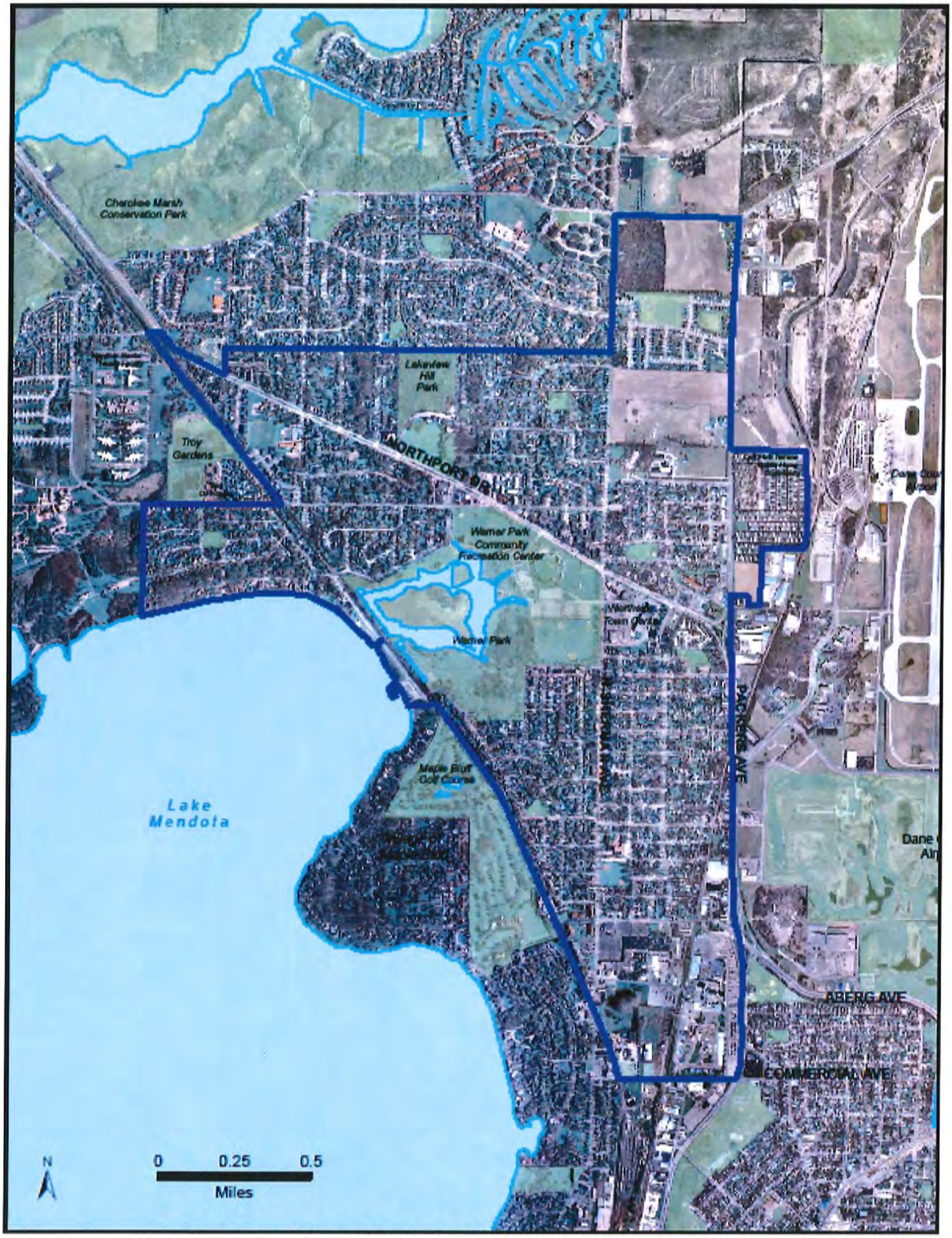
The analysis documented here suggests that there are opportunities for business attraction, development, and redevelopment on the Northside. Demographically, the primary trade area is more ethnically diverse than other parts of Madison and has a somewhat lower median income. Still, it is a solidly middle-income area with good potential.

The two biggest challenges for retail and services will be to overcome much stronger competition and to counter perceptions (some likely true) that the neighborhood's business districts are run-down and unsafe. Renovations or redevelopment on North Sherman Avenue could support a mixed-use district with a greater number of specialty retail businesses and services. Northport Drive is a more challenging environment due to the presence of low-income housing, safety concerns, and susceptibility to competition from outlying areas.

Housing on the Northside is more affordable than elsewhere in the City of Madison, making it available to a wider pool of potential buyers. Future opportunities may include redevelopment centered on North Sherman Avenue and at Northside Town Center, continued residential development at the northern fringe of the neighborhood, and housing targeted to older buyers or renters. Higher rates of foreclosure activity on the Northside are an issue of immediate concern. These may be addressed through existing programs or funding made available through the Housing Relief Act of 2008.

While there is a large quantity of office and industrial space on the Northside, this tends to be Class B space. This area offers a minor cost advantage over competition in more visible locations. It may also offer a greater possibility for a business to own its own property. As might be expected, businesses serving the airport have clustered in this location. Contractors, trades, and related businesses have also gravitated to the area. Proximity to a large work force and rising commuting costs may create an advantage for its continued development.

Map 1 – Northside Study Area



Source: City of Madison Department of Community and Economic Development

BACKGROUND

The Northside study area is generally bounded by Lake Mendota and the Village of Maple Bluff to the west, the Emerson East – Eken Park Neighborhood to the south, Dane County Regional Airport on the east, and unincorporated lands in the Towns of Burke and Westport to the north.

The primary corridors through this neighborhood include Packers Avenue, North Sherman Avenue, Northport Drive, and County Highway CV. Aberg Avenue also serves as a route into the neighborhood (see Map 2.) With the exception of North Sherman Avenue, these roads have been designed to conduct traffic through the area quickly, without stopping. This is reflected in access management patterns, intersection design, posted speeds, the design of abutting uses, and the uses themselves. This characteristic of the neighborhood undoubtedly has a significant impact on the health of the neighborhood's businesses as well as the desirability of sites along these streets.

General Environmental Conditions

The neighborhood and its surroundings are very diverse, transitioning from urban to rural, including low-income housing along with some of the most expensive homes in the county, and containing a diversity of non-residential uses. Due in part to this varied nature, the neighborhood does not have a well-developed identity, as do many of Madison's other neighborhoods (ex., Nakoma or Schenk-Atwood). This problem is compounded by the lack of distinguishing landmarks, central gathering places, or strong anchors. Warner Park, Northside Town Center (formerly Sherman Plaza), the airport, or Oscar Mayer may be the features most often associated with the neighborhood, but none of these have a strong image or consistent drawing power.

Housing

Several diverse residential neighborhoods are located within the study area. These range from low-income rental properties to some of the most expensive housing in the state. In general, the southern portion of the neighborhood is dominated by small, older homes originally built for the workers at Oscar Mayer and other industries on Madison's east side. Maple Bluff is the exception to this, containing many large and expensive homes including the Executive Residence. Many residents of these areas are long-term residents. As they age and move out, the area will undergo a transition. Younger and minority buyers are moving in.

There is a concentration of rental housing around Northside Town Center. Much of this appears to have been constructed between the late 1960's and early 1980's. A large number of the units are rented to low-income households, creating a pocket of poverty around the neighborhood's primary commercial center. These apartment communities do not have an attractive look, and likely detract from the desirability of surrounding uses.

Housing in the northern part of the neighborhood has been constructed more recently and tends to have a suburban character. A majority of units are detached single-family homes, although the most recent construction has included attached condominiums marketed to empty-nesters. There is still some opportunity for development to the north, which may include redevelopment of the Mendota Mental Health Center if that facility is eventually closed.

Dane County Regional Airport and Lake Mendota separate the Northside from other residential neighborhoods to the east and west. Road patterns (few street connections and limited access roads) help to disconnect the Northside from residential neighborhoods to the south. The Village of Waunakee lies to the northwest. That community has attracted significant new development in recent years, particularly housing for upper-income buyers.

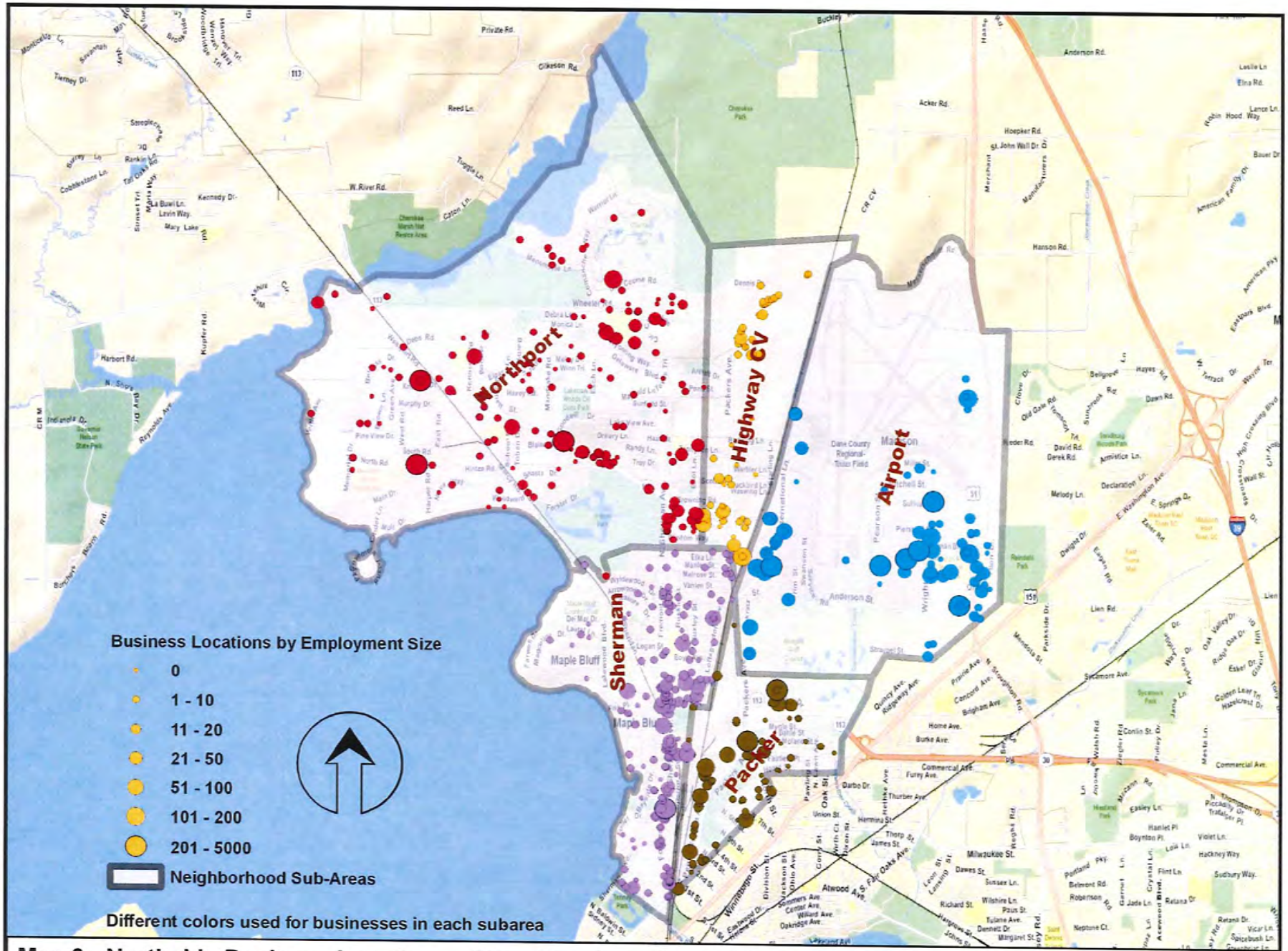
Employment Centers

ESRI Business Analyst identifies 1,084 businesses with a total of about 22,000 jobs located on Madison's Northside (see Appendix B). For the purpose of this analysis, the Northside was defined to include an area bounded by the Yahara River and Lake Mendota, the Cherokee Marsh, Highway 51, and one block north of East Washington Avenue. The area is depicted on Map 3. It was further subdivided to allow a more detailed analysis of different parts of the neighborhood.

In general, the Northside has the highest business counts in industries such as construction, social services, legal services, office administrative services, and some categories of retail. Many of these businesses, however, have few employees. The largest employers in the area include Oscar Mayer (2,500 employees), Covance Laboratories (1,850 employees), Madison Area Technical College (1,500 employees), Central Wisconsin Center for the Developmentally Disabled (1,000 employees), Great Lakes Educational Loan (800 employees), and the Mendota Mental Health Institute (750 employees).

Map 2 – Primary Corridors on the Northside of Madison

Source: R.A. Smith National, Inc.



Map 3 - Northside Business Locations - City of Madison Northside Market Analysis

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The Packers Avenue sub-area of the Northside study area has 110 businesses employing about 6,380 people. This number includes 2,500 employees at Oscar Mayer. Manufacturing and transportation tend to play a more significant role in this part of the neighborhood than they do elsewhere.

North Sherman Avenue sub-area businesses include a large number of retail businesses, restaurants, and business and personal services, as would be expected given the zoning and configuration of most properties in the area. There are an estimated 2,493 employees at 459 businesses in this area. About 15 percent of the area's businesses are in construction. As Map 3 suggests, there appear to be a large number of home-based businesses in the area.

Many home-based businesses appear to be located in the Northport Drive sub-area as well, although the business locations mapped in residential parts of this sub-area also include the management offices of apartment communities. A total of 3,564 employees are shown in 213 businesses in this sub-area. Social services (such as Mendota Mental Health Institute, Dane County Human Services, etc.) and related businesses are a strong component of the business mix, especially in terms of employment. A majority of the remaining businesses are in retail and services.

Home-based businesses found on the Northside tend to represent a wide variety of construction, service, and professional occupations. Examples include home remodeling, landscaping services, flooring installers, cleaning services, photographers, professional writing services, accountants, and others. There are typically only one or two people employed at these businesses.

The Highway CV sub-area has only 76 businesses with a total of 659 employees. The business mix is varied, including some construction, manufacturing, and services. The typical business in this area might be something like vehicle rental, vehicle repair, a storage facility, or contractor. These kinds of uses can be described as "service commercial" uses that may have limited customer traffic with a majority of space dedicated to storage or light activities.

The largest number of employees (8,916) work around Dane County Regional Airport, including the airport itself and in the business parks surrounding it. The mix of businesses here is varied, with no sector dominant. Many of the businesses appear to have some tie to the airport, however, including activities such as maintenance, catering, hanger facilities, the military, or restaurant and retail facilities within the airport. There is an interesting assortment of office tenants, including several health care businesses, insurance and financial services, and the Madison offices of three engineering firms.

Lodging

There are no lodging facilities in the immediate vicinity of the airport or anywhere within the Northside. The nearest concentration of hotels is a short distance to the east, at the intersection of East Washington Avenue with the Interstate highway. A second cluster of hotels exists in the downtown area. These two locations have an advantage in being closer to employment centers (for business travel) and tourist destinations (downtown).

Commercial Uses

Nearly all of the commercial activity that occurs in the area is located on one of three streets. In addition, there are two primary nodes of activity, at the Northgate Shopping Center and at Northside Town Center.

North Sherman Avenue

North Sherman Avenue extends from Madison's isthmus north to Wheeler Road. Fordem Avenue connects North Sherman Avenue to Johnson Street and is another primary access route into the Northside. This street carried an average of 21,900 cars per day in 2000. The street was being reconstructed in 2008. It has a total of four lanes (two in each direction) north of the intersection with Fordem Avenue.

North Sherman Avenue is bordered by a mix of interspersed residential and commercial uses. The greatest concentration of commercial activity is located around Northgate Shopping Center, at the southeast corner of North Sherman Avenue and Aberg Avenue. It is in this area that the Village of Maple Bluff has prepared a "Gateway" plan to redevelop properties lying east of North Sherman Avenue, in the Village of Maple Bluff. At present it does not appear as if this plan has generated any development interest, and the Village has not taken any initiatives to promote redevelopment of the site.

Most of the commercial buildings along North Sherman Avenue appear to have been constructed in the first two decades following World War Two. Many are not properties that would be characterized as "urban" commercial. Instead, they are typically small strip centers or free-standing buildings. Although developed for an auto-dominated traffic pattern, a number of these properties would struggle to meet modern site or building design criteria (adequate parking, site configuration, landscaping, building design, ceiling heights, lighting, etc.). Some have been well maintained and modernized to the extent possible, while others may be in

need of extensive renovation. A handful of properties have been redeveloped with new buildings.

The North Sherman Avenue area includes the majority of specialty and destination retail on Madison's Northside. This includes businesses such as Frugal Muse Books, The Jeweler's Workshop, and Savidusky's. It also includes some of the area's more popular restaurants, such as Manna Café and the Esquire Club, which is planning a significant renovation of its facility.

Packers Avenue / County Highway CV

Packers Avenue (State Highway 113) originates at Pennsylvania Avenue on the south, continuing north past Northport Drive as County Highway CV. The road eventually connects to U.S. Highway 51, and then to an interchange with Interstate Highway 39-90-94 north of the airport. It is a four-lane road for much of its length through the study area. In 2000, Packers Avenue carried 39,400 cars per day near the intersection with International Lane. This is one of the highest traffic counts in the City of Madison. A majority of this traffic appears to be going to the airport or turning north onto Northport Drive. The traffic count on County Highway CV drops to 9,500 vehicles per day.

Industrial uses dominate along Packers Avenue south of Aberg Avenue. Between Aberg Avenue and Northport Drive these give way to small service commercial uses along the west side of the street, and airport office/industrial parks (Corben Business Campus and Truax Air Park West) on the east side of the street. Further north , County Highway CV is bordered by a mobile home park and a limited amount of other residential, service commercial, and light industrial uses. There are several undeveloped parcels in this area, some of which are being actively marketed for development.

Although the older industrial buildings on the southern stretch of Packers Avenue have been maintained in a manner consistent with their function, they do not present an attractive entry to the neighborhood. Most were developed at a time when expectations for site design, landscaping, and building architecture were less strict than they are currently. This was aptly described by one neighborhood stakeholder as a "rust-belt image" that detracts from the neighborhood and does not create a favorable impression for visitors to Madison as they are exiting the airport.

A similar condition is true of many of the service commercial uses through the middle section of the street. These tend to be dominated by auto-oriented uses including fueling, repair, and used vehicle sales. Building architecture and alterations, site design, landscaping, lighting, and signage often do not meet present-day criteria.

Newer structures are located in the airport business park and north on County Highway CV. These are typical of contemporary office and industrial spaces.

The Dane County Regional Airport has a long-range plan to add an entrance from County Highway CV in the vicinity of the terminal. If this plan comes to fruition, it could help to create a demand for some retail and service uses along County Highway CV, where there are currently none.

Northport Drive

Northport Drive (State Highway 113) extends northwest from Packers Avenue through the study area and on to Waunakee. It is a primary route from the north into Madison's isthmus, and carried 28,900 cars per day in 2000. Traffic counts dropped to 11,800 north of County Highway M. The street has four lanes with few intersecting streets.

Northport Drive is anchored at its southern end by Northside Town Center. Although the center was recently remodeled it has a high rate of vacancy. There are also several large apartment complexes in this area, several of which are low-income rentals. There is a smaller commercial node located further northwest near the intersection with Troy Drive. The largest anchor in this area is Jung's Garden Center. Brennan's Market was located across from Jung's for many years, but closed in 2007. According to the City of Madison, it will be replaced by a credit union by 2012.

Northport Drive is bordered by a railroad, parks, and natural areas for a significant part of its length. Except for the two commercial areas mentioned, nearly all of the development along the street is residential.

Northgate Shopping Center

Northgate Shopping Center is the older of two commercial centers located on the Northside. Originally constructed in 1962, the strip center contains approximately 110,000 square feet on 8.06 acres of land at the southeast corner of North Sherman Avenue and Aberg Avenue. Tenants in the mall include American Table Family Restaurant, Angkor Thom Asian Market, Cost Cutters, Dorn True Value Hardware, Frugal Muse Books, Northgate Antique Mall, Pizza Extreme, Laundryland, Savidusky's Fur and Leather, Weaver Auto Parts, The UPS Store, and others. The Dane County Job Center is located immediately to the east on Aberg Avenue.

In 2008 the Northgate Shopping Center was purchased by the Alexander Companies. The new owner has indicated

intentions to provide façade renovations, redesign and landscaping of the parking lot, and potential new buildings on pad sites on North Sherman Avenue and Aberg Avenue.

Northside Town Center

Originally known as Sherman Plaza, Northside Town Center received its new name in 2008. The center was constructed in 1965 and was extensively renovated in 2000. The total gross leasable area is reported at 146,735 square feet. Major tenants include Altered States Alterations, Anchor Bank, Benvenuto's Restaurant, the Coffee Gallerie (now closed), Family Dollar, the Lakeview library branch, Meikle's True Value Hardware, Pierce's Northside Market, Rocky Rococo, Serenity Salon & Spa, Subway, Walgreen's, and other smaller tenants.

Several businesses in the center have closed, creating significant vacancies. The largest of these is a 48,910 square foot space vacated when a Kohl's grocery store closed its doors in 2004. Roundy's, which purchased Kohl's, continues to pay rent on its lease and agreed to make a concession on an exclusionary clause to permit Pierce's Northside Market to open a store in the center. It has currently listed the property as an available sublease at $10 per square foot.

Hancock Fabrics closed in 2007. This space has approximately 16,000 square feet. It will be occupied by an expanded Meilke's True Value Hardware, which will be relocating from 14,000 square feet in the inner corner of the center. That space will then be available.

There is 1,920 square feet empty in the center's southwest corner, which was vacated when a video store closed in 2007. The owner is asking $11.75 per square foot triple net.

Northside Town Center is comprised of two multi-tenant buildings set perpendicular to North Sherman Avenue and to Northport Drive. The ends of both buildings have small tenant spaces parallel to the streets. Walgreen's, Rocky Rococo, Anchor Bank, and a gas station are located in freestanding buildings near the intersection. There are some small commercial uses along Northport Drive in the vicinity of the center. Warner Park is located to the west across North Sherman Avenue. The center's main entrance is aligned with the entrance to Warner Park.

Center visibility is not good. From the intersection, the outbuildings block views of the larger multi-tenant buildings and anchor stores. This is somewhat true also from the entrance to Warner Park. Further south on North Sherman Avenue the grade of the property is higher than that of the street, and impairs visibility of the building. Along Northport Drive, high speeds, a fence in the median, and the arrangement of buildings make it difficult to identify businesses within the center.

Grade differences impair visibility of the Northside Town Center from both Sherman Avenue and Northport Drive.

The original site on which the center was developed had a considerable change in grade. This site was essentially leveled at the time the center was developed, and the parking lots and buildings were constructed at more or less the same elevation. This resulted in the grade differences between the buildings and adjoining roads, which are the greatest challenge for visibility. Short of redeveloping the center, however, there is little that can be done to address this issue.

The entire center was extensively remodeled in 2000. Subsequent maintenance has been excellent, with the owners quick to remove graffiti or to address other issues that might create an impression of decay or a lack of safety.

The owner has indicated an interest in potential redevelopment of portions of the center. This may include a mixed-use approach, adding a multi-story residential or mixed-use building in the back corner of the property.

Neighborhood Grocery Shopping

The Northside has been served by several different grocery chains. At 48,000 square feet, Kohl's Food Emporium, located in the Northside Town Center (then called Sherman Plaza) was the largest of these. The store was remodeled along with the entire center in 2000. Shortly after the chain was purchased in 2003 by Roundy's Corporation, a decision was made to close the store.

An Eagle Grocery Store was once sited on Northport Drive where Jung's Garden Center is currently located, and a

nearby Brennan's Market closed in 2007, reportedly due to structural problems with the building's roof.

The grocery market is currently served by Pierce's Northside Market (IGA), two ethnic groceries, and convenience stores. Pierce's Markets operates five grocery stores in Wisconsin, including its store in the Northside Town Center. The Northport store occupies about 25,000 square feet, including areas for fresh produce, a deli, and bakery. It is about half of the size of a typical grocery store (47,500 square feet[1]).

Pierce's Northside Market is bright, clean, and well-stocked, with good quality perishables. During visits to the store it appeared to receive average traffic.

The next closest grocer is a Copp's Food Store north of Aberg Avenue on Shopko Drive. This store is owned by Roundy's, which purchased both the Kohl's and Copp's chains in recent years. This store appears to be performing well, despite its geographic separation from surrounding residential neighborhoods.

Woodman's is a significant competitor in Madison's grocery market, with an estimated 28 percent market share.[2] Its massive store on Milwaukee Street is very convenient for people living on the Northside. With a very large selection and a reputation for low prices, it attracts a significant share of the Northside grocery market potential.

North Mendota Parkway

While only bordering Madison's Northside, the proposed North Mendota Parkway has the potential to alter commercial opportunities within the area. The proposed parkway is the solution to discussions concerning the need for a "north bypass" to route traffic around Madison. Projections show that the route, which will follow existing County Highway K, County Highway M, State Highway 113, and State Highway 19, is likely to carry at least 49,000 cars per day[3].

Bypass construction will likely result in improved accessibility between the Northside and other parts of the metropolitan area.

Warner Park

Warner Park has been identified as a recognized feature of Madison's Northside. The park occupies the southwest corner of North Sherman Avenue and Northport Drive, extending to Lake Mendota. It contains the Warner Park Baseball Stadium, the Warner Park Community Recreation Center, Warner Beach, picnic areas, and recreational facilities. The park may also be the site of a future public pool. Because of its size the park plays host to many large events, including the annual Rhythm and Booms Fourth of July Celebration.

While the park draws many people to the Northside, aspects of its design likely prevent it from having a greater positive impact on nearby businesses. Park activity areas are generally located some distance from commercial development. The dominant use along North Sherman Avenue, for instance, is a large parking lot. The Community Center and the beach are located far from either Northside Town Center or the commercial node at Troy Drive. The same is true of the stadium, which is furthermore designed with its back fence and service areas along Northport Drive. In a more ideal scenario, uses in the park would have been sited to strengthen adjacent commercial areas by generating cross traffic.

The Madison Mallards play about 38 home games at the Warner Park Baseball Stadium during the summer months. Average attendance during the 2008 season was 6,115 persons. The stadium has a 7,500 person capacity. It has a concession with alcohol sales, and no outside food or drink may be brought into the stadium. Given these conditions, while traffic from the Mallards may add a small amount to sales at area businesses, it does not bring a level of activity that would support new businesses.

Streetscape

The appearance of the public and private streetscape can have an impact on public perceptions of the area and on the viability of businesses on the street. Although the attractiveness of the streetscape is certainly a factor, the more fundamental issues are visibility of both buildings and signage, vehicular access, and bicycle and pedestrian accommodation. Achieving a desirable streetscape is not solely a governmental responsibility. While a city should take business needs into consideration when designing the public right-of-way, owners of private property have at least an equal role in ensuring that their improvements contribute to the effectiveness of the streetscape.

Streetscape conditions on North Sherman Avenue, Northport Drive, and Highway CV and Packers Avenue are generally average to poor. Storefront visibility is particularly a problem (although this may be improved with North

[1] Food Marketing Institute, 2007

[2] Trade Dimensions, 2006

[3] Final Report & Recommendations of the North Mendota Parkway Advisory Committee for the North Mendota Parkway Alternatives Study, October 22, 2003

Sherman Avenue reconstruction). Aesthetically, some properties may have a dated appearance, unsympathetic alterations, poor landscaping, or other characteristics that detract from their appearance. In some places, the public streetscape may be little more than a strip of grass between the sidewalk and the street.

Streetscape improvements may be considered in the Northside study area. Appropriate improvements include:

- façade improvements, signage, and landscaping on private properties;
- gateway signage and landscaping at major entry points to the neighborhood;
- prairie plantings and wayfinding signage in the airport business parks (similar to the streetscape on the airport);
- sidewalks, improved terraces, and street trees on Packers Avenue; and
- decorative lighting, banners, landscaping, or similar features in a proposed "main street" district on North Sherman Avenue.

Primary and Secondary Trade Areas

This study used estimated grocery store market shares to help define the primary and secondary trade areas for the Northside. Pierce's Northside Market is the anchor retail use in the Northside area. Furthermore, grocery stores will typically serve a neighborhood market. The trade areas delineated by their sales will serve as a reliable surrogate for many other types of retail and services that are found in the area.

The grocery store analysis used here is derived from the Huff (gravity) model. The Huff model is based on the principle that the probability of a consumer visiting and purchasing at a given store is a function of the distance to that store, the attractiveness of that store, and the distance and attractiveness of competing stores.

For this analysis the attractiveness of a store was measured by the store's estimated annual revenue. Thus, a consumer would be more likely to go to a closer store with a large annual revenue than a smaller store that is farther away. The probabilities that a consumer in a Census block group would visit each of the identified grocery stores were calculated. Estimated sales from each block group were then calculated by multiplying the probability by the total consumer expenditures within the block group for food at home.

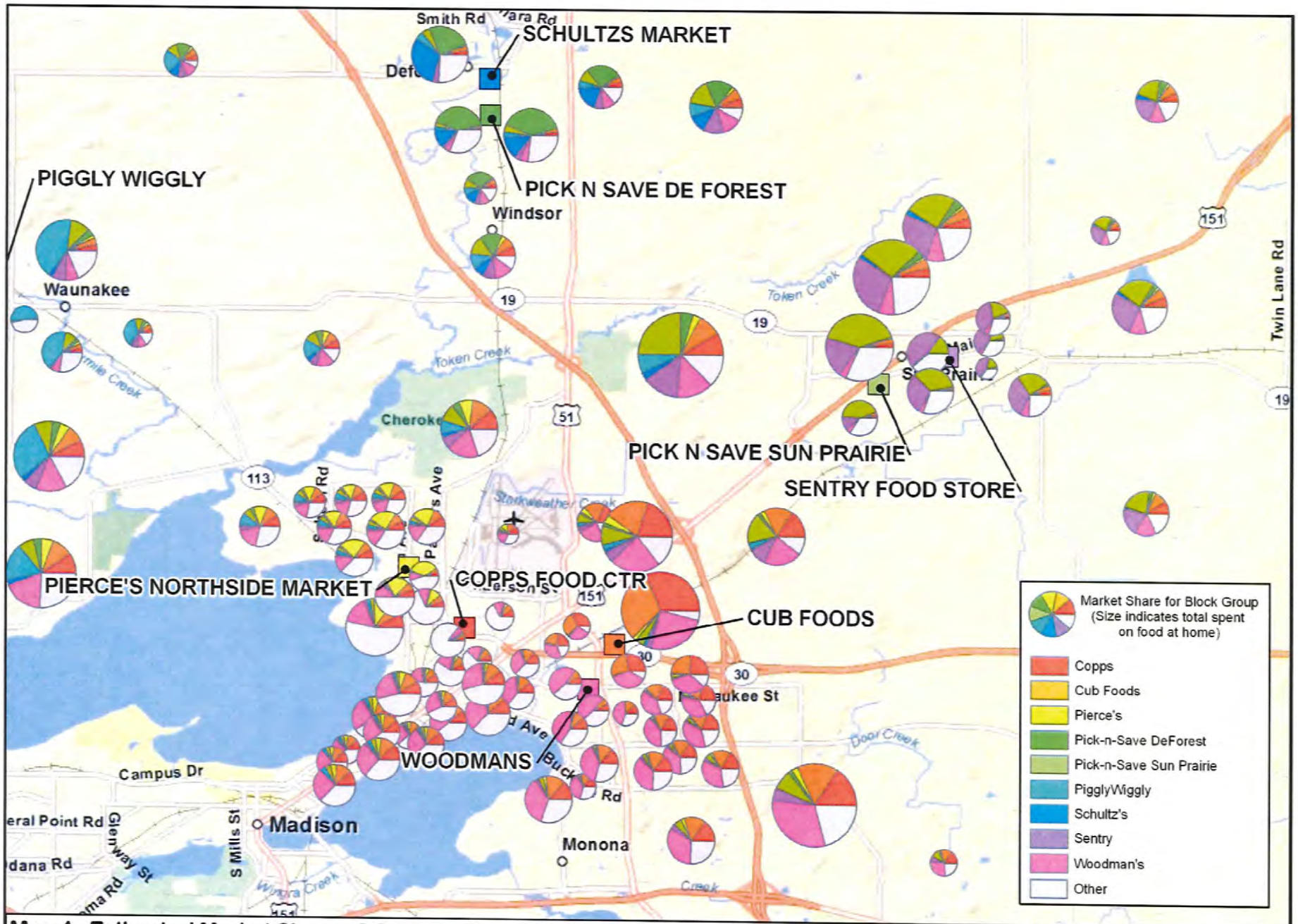
Example of a public streetscape and private development providing good visibility, access, bicycle and pedestrian accommodation, and aesthetic quality.

The results from this analysis are depicted in Map 4 – Estimated Market Share of Grocery Stores by Block Group. This map clearly demonstrates the dominance of Copp's Foods (which has approximately a 30 percent market share in Madison). Pierce's Northside Market has a limited draw, with the greatest pull coming from block groups north of the Yahara River and west of Packers Avenue.

To the north, The Pick 'n Save and Schultz's Market in Deforest capture the market for that area, while Waunakee's Piggly-Wiggly captures much of that market. Grocery stores in Sun Prairie further impact the Northside, as does a cluster of large grocery stores to the south (including Woodman's and Cub Foods).

The market share estimates are a guide to shopping patterns in the area, however, they are based on a simple mathematical model that does not account for demographic patterns, physical barriers, or other characteristics of the area that may influence where people shop. For that reason, information provided by neighborhood stakeholders along with the observations of the analyst team were used to further refine delineation of the primary and secondary trade areas for the Northside. These trade areas are depicted on Map 5 – Primary and Secondary Trade Areas for the Northside.

The primary trade area (usually considered to be where 60 percent of a store's business is drawn) is a relatively small area bounded by Lake Mendota and North Sherman Avenue on the west, the airport on the east, Wheeler Road to the north, and Oscar Mayer on the south.



Map 4 - Estimated Market Share of Grocery Stores by Block Group - City of Madison Northside Analysis *R.A. Smith National, Inc.*

Map 5 - Primary and Secondary Trade Areas - City of Madison Northside Market Analysis

R.A. Smith National, Inc.

Because of the distinctively differing demographics of Maple Bluff, the village was not included in the primary trade area. Village residents certainly patronize some Northside businesses that are in close proximity, however, it appears that a majority of their shopping is done elsewhere.

The secondary trade area (from which another 30 percent of business is drawn) does include Maple Bluff as well as a small additional area near the airport. To the north, it extends as far as the Yahara River. As with Maple Bluff, sharply differing demographics nearer to Waunakee suggest that a majority of people in this area do not shop Madison's Northside.

Table 1 – Comparative Demographics for Madison and the Northside Trade Areas

	Madison	Primary Trade Area	Secondary Trade Area – North	Secondary Trade Area – South
2000 Population	208,140	16,635	1,822	6,575
2008 Population Estimate	227,137	17,074	1,912	6,523
2013 Population Forecast	239,759	17,675	1,997	6,685
Annual Change, 2008-2013	1.09%	0.69%	0.87%	0.49%
2000 Households	89,070	7,035	886	3,227
2008 Households Estimate	99,744	7,356	952	3,266
2013 Households Forecast	106,462	7,675	1,003	3,375
Average Household Size, 2008	2.15	2.22	2.01	1.98
2008 Housing Units	106,653	7,882	1,050	3,448
2008 Owner Occupied Housing Units	44.5%	59.1%	85.6%	45.5%
2008 Renter Occupied Housing Units	49.0%	34.2%	5.0%	49.2%
2008 Median Household Income	$55,290	$53,226	$78,079	$49,587
2008 Average Household Income	$70,476	$63,048	$98,773	$74,541
2008 Per Capita Income	$31,633	$27,711	$48,960	$37,659
2008 Median Age	31.9	38.2	56.4	37.1
2008 Population Under 18 Years	16.8%	21.3%	13.5%	17.2%
2008 Population Age 65 or Older	10.4%	13.2%	31.6%	9.5%
2008 White Population	84.3%	80.9%	96.4%	85.7%
2008 Black Population	5.7%	9.2%	1.0%	5.6%
2008 Asian / Pacific Island Population	5.6%	4.4%	1.5%	3.2%
2008 Other Race Population	4.4%	5.5%	1.1%	5.5%
2008 Hispanic Origin Population	4.2%	4.7%	1.3%	4.9%
Less Than High School Graduate	6.2%	12.5%	2.8%	7.4%
High School Degree	17.5%	30.3%	24.4%	17.7%
Some College	18.1%	22.1%	21.4%	17.1%
Associate's Degree	8.4%	9.9%	9.9%	6.8%
Bachelor's Degree	27.9%	17.3%	23.9%	30.0%
Graduate Degree	22.0%	7.8%	17.6%	21.0%
In Labor Force	73.1%	69.1%	63.3%	78.4%
Employed	69.5%	65.3%	62.5%	75.3%
Unemployed	3.5%	3.8%	0.2%	3.0%
Employed in White Collar Jobs	72.7%	61.8%	82.2%	68.3%
Employed in Services	15.5%	17.9%	9.3%	17.2%
Employed in Blue Collar Jobs	11.8%	20.3%	8.5%	14.6%
Households Without Vehicles Available	11.8%	11.4%	0.0%	10.8%

Source: ESRI, R.A. Smith National, Inc.

Socio-Economic Analysis

The primary trade area had a 2008 population estimate of 17,074 persons and 7,356 households. (See Table 1 and Appendix C) This is an increase of 439 people and 321 households from 2000. Growth is projected to continue over the next several years, at a pace somewhat slower than Madison as a whole.

Demographics for the primary trade area differ from the rest of the city in several key aspects. There is much greater racial diversity. The proportion of both school age (under 18) and retirement age (65 or older) individuals is higher, suggesting the presence of younger families along with residents who have aged in place. Residents of this area are less educated than the city as a whole, and are more likely to work in service and blue collar occupations.

Incomes in this area are lower than in Madison, and particularly in comparison to the secondary trade areas. About one in five households earned less than $25,000 in 2008. Although this number is comparable to the entire city, in this area it is more likely to be low-income families as opposed to students with little income.

The secondary trade area has been divided into southern and northern areas. Both exhibit demographic characteristics that are different than those of the primary trade area.

The northern portion of the secondary trade area has the smallest population, but one that is very homogenous. This is particularly true in terms of racial composition, age, income, and employment. Residents of this area tend to be white empty-nesters, employed in white collar jobs with high household earnings.

The southern portion of the secondary trade area is similar to the rest of Madison in terms of race, education, and employment. Although the median household income is the lowest of the four areas profiled, per capita income is high, as a result of a high percentage of one-person households.

Market or consumer segmentation is a technique used by some analysts to group people of similar demographic backgrounds. ESRI Business Analyst (Community Tapestry) was used to identify consumer segments in the Northside. Five segments roughly correspond to the primary trade area, with another three falling in the secondary trade area. These segments correspond to observations of the analysts and stakeholder input concerning the neighborhood. They are significant in that they support conclusions regarding the progress of gentrification (redevelopment) originating on the isthmus and progressing outward to the east side neighborhoods adjacent to the study area. The Community Tapestry segments identified in the primary trade area include the following.

- Enterprising Professionals

  This fast-growing market is home to young, educated, working professionals, with a median age of 32.4 years. Single or married, they prefer newer neighborhoods with townhomes or apartments. The median household income is $71,018. This segment is ranked second of all the Community Tapestry markets for labor force participation, at 75 percent. Their lifestyle reflects their youth, mobility, and growing consumer clout. Residents rely on cell phones and PCs to stay in touch. They use the Internet to find their next job or home, track their investments, and shop. They own the latest electronic gadgets. Leisure activities include yoga, playing Frisbee and football, jogging, going to the movies, and attending horse races and basketball games. These residents also travel frequently, both domestically and overseas.

- Cozy and Comfortable

  Cozy and Comfortable residents are settled, married, and still working. Many couples are still living in the pre-1970s, single-family homes in which they raised their children. Households are located primarily in suburban areas of the Midwest, Northeast, and South. The median age is 42.1 years, and the median home value is $174,687. Home improvement and remodeling are important to Cozy and Comfortable residents. Although some work is contracted, homeowners take an active part in many projects, especially painting and lawn care. They play softball and golf, attend ice hockey games, watch science fiction films on DVD, and gamble at casinos. Television is significant; many households have four or more sets. Preferred cable stations include QVC, Home & Garden Television, and The History Channel.

- Aspiring Young Families

  These neighborhoods are located in large, growing metropolitan areas in the South and West, with the highest concentrations in California, Florida, and Texas. Mainly composed of young, married-couple families or single parents with children, the median age for this segment is 30.6 years. Nearly half of the households are owner-occupied, single-family dwellings or townhomes, and over half are occupied by renters, many living in newer, multiunit buildings. Residents spend much of their discretionary income on baby and children's products and toys as well as home furnishings. Recent

electronic purchases include cameras and video game systems. Leisure activities include dining out, dancing, going to the movies, attending professional football games, fishing, weight lifting, and playing basketball. Typically, vacations would include visits to theme parks. Internet usage mainly involves chat room visits.

- Inner City Tenants

  Inner City Tenants neighborhoods are a microcosm of urban diversity, located primarily in the South and West. This multicultural market is young, with a median age of 27.9 years. Households are a mix of singles and families. Most residents rent economical apartments in mid- or high-rise buildings. Recent household purchases include video game systems, baby food, baby products, and furniture. Internet access at home is not typical; those who have no access at home surf the Internet at school or at the library. Playing games and visiting chat rooms are typical online activities. Residents frequently eat at fast-food restaurants. They enjoy going to the movies; attending football and basketball games; water skiing; and playing football, basketball, and soccer. Some enjoy the nightlife, visiting bars and nightclubs to go dancing.

- Old and Newcomers

  Old and Newcomers neighborhoods are in transition, populated by those who are starting their careers or retiring. The proportion of householders in their 20s or aged 75 years or older is higher than the national level. The median age is 37.1 years. Spread throughout metropolitan areas of the United States, these neighborhoods have more single-person and shared households than families. Many residents have moved in the last five years. Over sixty percent of households are occupied by renters; approximately half live in mid-rise or high-rise buildings. Residents have substantial life insurance policies and investments in certificates of deposit, bonds, and annuities. Leisure activities include roller skating, using rollerblades, playing golf, gambling at casinos, playing bingo, and attending college ball games. They listen to classic hits on the radio. Many residents are members of fraternal orders or school boards

The following three Community Tapestry segments are found in the secondary trade area.

- Connoisseurs

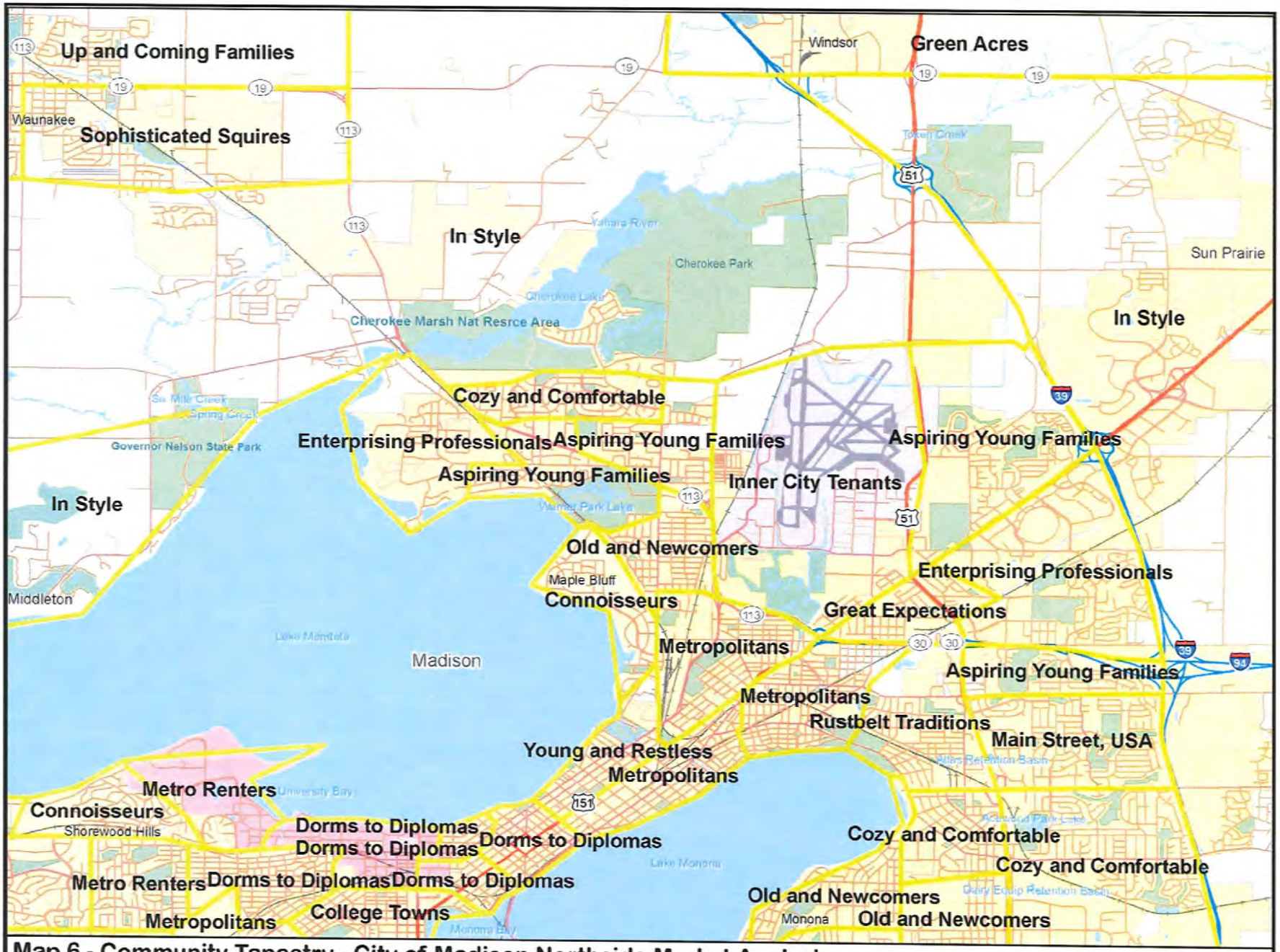
  Second in wealth but first for conspicuous consumption, Connoisseurs residents are well educated and somewhat older, with a median age of 47.3 years. Although residents appear closer to retirement than child rearing age, many of these married couples have children who still live at home. Their neighborhoods tend to be older bastions of affluence where the median home value is $706,720. Growth in these neighborhoods is slow. Residents spend money for nice homes, cars, clothes, and vacations. Exercise is a priority; they work out weekly at a club or other facility, ski, play golf, snorkel, play tennis, practice yoga, and jog. Active in the community, they work for political candidates or parties, write or visit elected officials, and participate in local civic issues.

- In Style

  In Style residents live in affluent metropolitan neighborhoods. More suburban than urban, they still embrace an urban lifestyle. Townhome ownership is more than double that of the national level; however, more than half of the households are traditional single-family homes. Labor force participation is high, and professional couples predominate. The median household income is $72,326. Nearly one-third of these households include children. The median age is 40.3 years. In Style residents are computer savvy; they use the Internet daily to research information, track investments, or shop. They own a diverse investment portfolio, contribute to retirement savings plans, and hold long-term care and life insurance policies. They enjoy going to the beach, snorkeling, playing golf, casino gambling, and domestic travel.

- Metropolitans

  Metropolitans favor city living in older neighborhoods. About half of the households are composed of singles living alone or with others. However, married-couple families comprise 40 percent of the households. The median age is 37.7 years. Over half of employed persons hold professional or management positions. These neighborhoods are an eclectic mix of single-family homes and multiunit structures, with a median home value of $215,587. The median household income is $62,812. Residents lead busy, active lifestyles. They travel frequently and participate in civic activities. They enjoy going to museums and zoos and listening to classical music and jazz on the radio. Refinishing furniture and playing a musical instrument are favorite hobbies. Exercise includes yoga, using rollerblades, and hiking/backpacking.



Map 6 - Community Tapestry - City of Madison Northside Market Analysis

R.A. Smith National, Inc.

Commuting Patterns

Approximately 22,000 jobs are located in the Northside area, including the Dane County Regional Airport and the business and industrial parks surrounding the airport. Additionally, traffic counts on Northport Drive, Highway CV, North Sherman Avenue, and Packers Drive are high, suggesting that there is a considerable amount of commuter traffic on these streets.

Journey to work data from the 2000 Census, provided by the City of Madison, suggests that a majority of the people working in the commercial areas along the Northside's arterial roads are drawn from several parts of the City of Madison. Areas in which the greatest concentrations of workers live include the Northside, the central isthmus, the near west side, and the far east side of Madison. To a lesser extent, they are drawn from the south side of the City. Relatively few workers are drawn to this area from surrounding communities such as Waunakee, Deforest, and Sun Prairie.

This would suggest that the dominant routes taken by these workers into the neighborhood would likely be North Sherman Avenue, Pennsylvania Avenue / Packers Avenue, and Aberg Avenue. As noted earlier in this report, there are about 9,000 people working in this part of the Northside, or about 40 percent of the total number of workers. Two-thirds of these jobs are located in the southern portion of the neighborhood. Since commuters will be more inclined to patronize businesses between their home and work (especially convenience-oriented businesses such as gas stations, laundries, pharmacies, etc.), they are most likely to have an influence on commercial activity on North Sherman Avenue, if anywhere in the neighborhood. They are less likely to patronize businesses at the northern end of the neighborhood that would be considerably out of their way.

The airport business parks have a different pattern of commuting. Workers in these areas are less heavily drawn from the Northside. The areas in which the greatest concentration of workers live are the far east side of Madison, Sun Prairie and surrounding areas, and areas to the north (Waunakee, Deforest, and Columbia County). The airport business parks also tend to draw more employees from Middleton and northwest Madison than does the remainder of the Northside.

As a result of these patterns, many workers will be using Highway CV, Highway 151, Highway 51, Highway 30, Packers Avenue, and Northport Drive to get to work. Commuters who may stop for convenience-oriented retail and services on their way to and from work will have numerous options along these routes, prior to arriving in the Northside study area. Still these uses are, or might be accommodated on Northport Drive, Packers Avenue, and Highway CV.

The Dane County Regional Airport is a significant factor in the high traffic counts on neighborhood arterial streets. Travelers using the airport could also help to support convenience retail. Existing opportunities may shift north along Highway CV if a new airport entrance is constructed, as has been planned (although not in the immediate future).

RETAIL MARKET ANALYSIS

The strength of the Northside's retail and service sector has declined since the area first developed in the 1960's. For much of its history the Northside had more than one grocery store and had a full-line general merchandise store. This changed with the closing of Prange Way, Kohl's Foods, Eagle, and other former tenants. The retail and services that remain serve a primarily neighborhood market, with the exception of some specialty businesses on North Sherman Avenue.

Potential and Estimated Sales

Estimates of retail demand (market potential) and supply (retail sales) were provided by ESRI, a vendor of proprietary market data (see Table 2). Because there is a lag between actual events in the trade area and the availability of data, some of the more recent changes will not be reflected in this information. Examples include the closing of the Brennan's and Hancock Fabrics stores. These are relatively minor changes that should not alter the results of the analysis.

There is an estimated $172 million in potential sales from the primary Northside trade area. This total rises to about $260 million with the addition of the secondary trade area. ESRI calculates sales potentials based on national averages that are adjusted for trade area demographics. Potential sales from within the primary trade area are estimated to be below average, while potential sales for both the northern and southern secondary trade areas are at or above average.

Retail sales within the primary trade area are estimated to total $88 million, or about 51.5 percent of the sales potential. This leaves a gap of over $83 million that is spent outside of the trade area. Automobile, grocery, clothing, and food service and drinking place sales make up approximately three-quarters of the gap. The strongest-performing retail categories are gasoline stations and building materials, garden equipment, and supply stores. These would include the two hardware stores and Jung's Garden Center.

The combined primary and secondary trade areas are estimated to have a total of $258 million in sales. This is only slightly less than the sales potential for the same area, leaving a gap of $1.8 million. On examination, though, this number is found to be skewed by very high sales in the motor vehicle and parts dealers category, where there is estimated to be a sales surplus in excess of $36 million, and by gasoline stores, with a surplus of over $72 million. This latter statistic is a result of the fuel demands at Dane County Regional Airport.

When motor vehicle and parts dealers and gasoline stores are left out of the totals, the combined trade area has an estimated $165 million in retail potential and $54 million in sales, resulting in a gap (leakage) of $111 million that is spent outside of the area. Categories with the greatest leakage include grocery stores, food service and drinking places, general merchandise, clothing, and furniture and home furnishings. Lawn and garden equipment and supplies stores, liquor stores, jewelry stores, used merchandise stores, and office supplies, stationery, and gift stores appear to be capturing the market most effectively.

Competitive Analysis

Commercial activity – services along with retail – is often categorized based on the character of population that it serves. These categories include:

- Regional Centers

  Regional centers serve the largest number of people, and may include millions of aggregate square feet of space. They are almost always anchored by one or more department stores along with specialty retail stores.

- Community Centers

  Community centers are typically anchored by a discount department store and may include other "big box" anchors, along with specialty retail. The total gross leasable area of a community center is usually over 250,000 square feet.

- Neighborhood Centers

  As the name implies, neighborhood centers typically serve the needs of people living in close proximity. These are smaller (75,000+) square foot centers usually anchored by a grocery store and/or pharmacy with other small retail.

- Convenience Centers

  Convenience centers are small commercial agglomerations serving the daily needs of area residents.

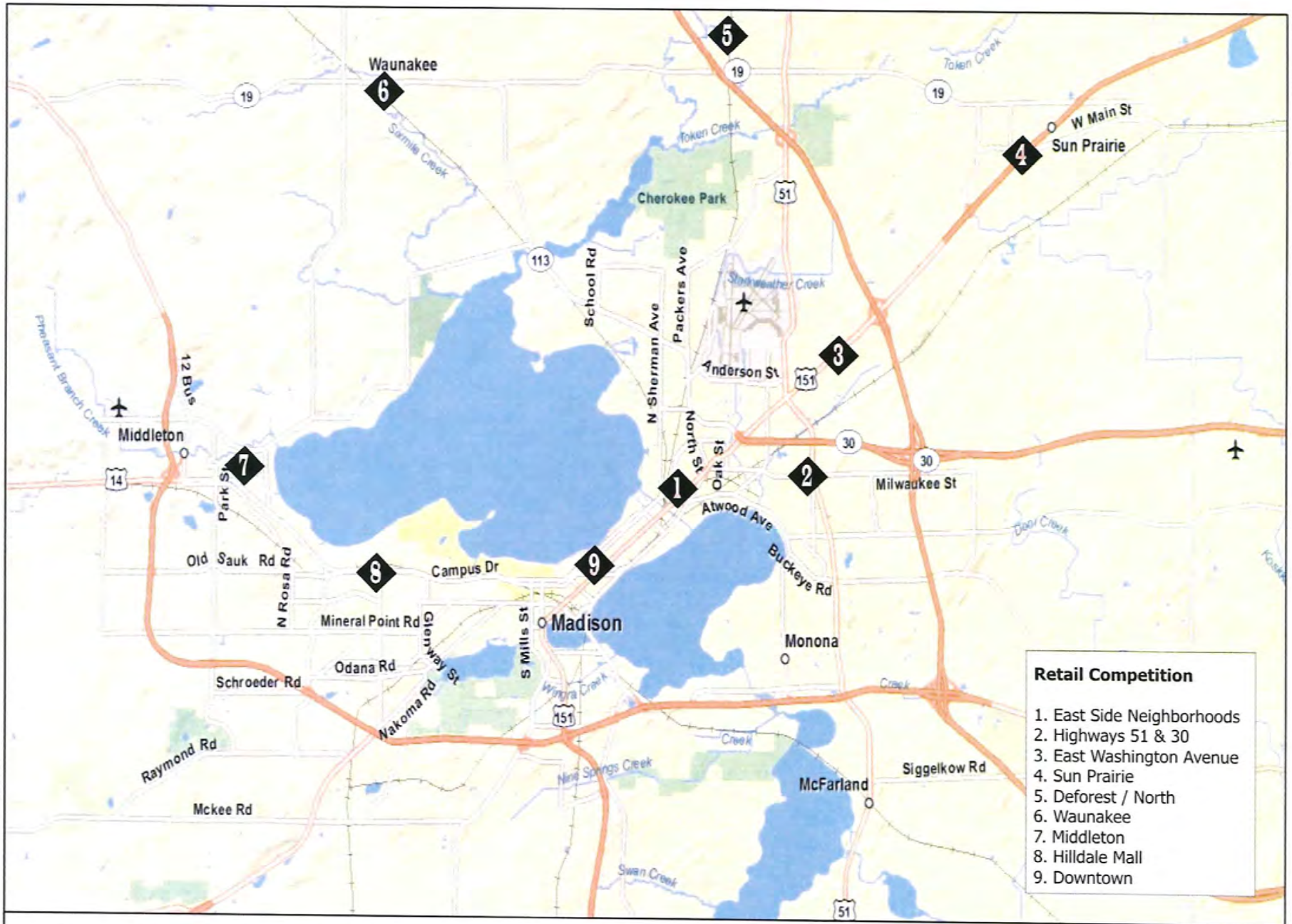
The Northside competes with several areas for these various levels of commercial activity. Since their development, however, the Northside's shopping areas have failed to maintain their original position in the hierarchy.

Table 2 – Potential and Estimated Sales and Retail Gap (Leakage/Surplus)

	Primary Trade Area			Combined Primary and Secondary Trade Areas		
	Demand (potential)	Supply (retail sales)	Retail Gap	Demand (potential)	Supply (retail sales)	Retail Gap
Motor vehicle and parts dealers	$37,301,066	$7,304,940	$29,996,126	$57,797,689	$94,652,908	-$36,855,219
Automobile dealers	$32,229,800	$5,343,296	$26,886,504	$49,705,143	$68,822,731	-$19,117,588
Other motor vehicle dealers	$2,962,036	$1,506,328	$1,455,708	$4,882,613	$23,836,873	-$18,954,260
Auto parts, accessories, and tire stores	$2,109,230	$455,316	$1,653,914	$3,209,933	$1,993,304	$1,216,629
Furniture and home furnishings	$7,460,903	$2,065,223	$5,395,680	$12,013,193	$459,945	$11,553,248
Furniture stores	$4,240,342	$338,282	$3,902,060	$6,725,315	$57,443	$6,667,872
Home furnishings stores	$3,220,561	$1,726,941	$1,493,620	$5,287,878	$402,502	$4,885,376
Electronics and appliance stores	$7,075,200	$2,073,884	$5,001,316	$10,884,981	$3,595,637	$7,289,344
Bldg. materials, garden equip., supply stores	$5,531,746	$14,703,684	-$9,171,938	$9,243,896	$2,860,613	$6,383,283
Building materials and supplies dealers	$4,817,024	$13,671,066	-$8,854,042	$8,080,965	$1,287,409	$6,793,556
Lawn and garden equipment and supplies	$714,722	$1,032,618	-$317,896	$1,162,931	$1,573,204	-$410,273
Food and beverage stores	$30,086,534	$5,901,835	$24,184,699	$44,457,638	$18,059,759	$26,397,879
Grocery stores	$27,672,040	$2,639,561	$25,032,479	$40,874,450	$15,407,221	$25,467,229
Specialty food stores	$980,667	$1,767,035	-$786,368	$1,449,201	$235,423	$1,213,778
Beer, wine, and liquor stores	$1,433,827	$1,495,239	-$61,412	$2,133,987	$2,417,115	-$283,128
Health and personal care stores	$7,298,341	$4,301,539	$2,996,802	$10,854,887	$1,107,262	$9,747,625
Gasoline stores	$25,000,555	$28,097,976	-$3,097,421	$36,974,851	$109,374,079	-$72,399,228
Clothing and clothing accessories stores	$9,390,543	$885,380	$8,505,163	$14,143,708	$2,610,018	$11,533,690
Clothing stores	$7,552,741	$564,970	$6,987,771	$11,335,305	$957,667	$10,377,638
Shoe stores	$848,561	$257,832	$590,729	$1,231,503	$74,854	$1,156,649
Jewelry, luggage, and leather goods stores	$989,241	$62,578	$926,663	$1,576,900	$1,577,497	-$597
Sporting goods, hobby, book and music	$3,430,371	$903,944	$2,526,427	$5,122,937	$2,229,096	$2,893,841
Sporting goods, hobby, and musical instr.	$1,900,542	$166,811	$1,733,731	$2,892,577	$208,234	$2,684,343
Book, periodical, and music stores	$1,529,829	$737,133	$792,696	$2,230,360	$2,020;862	$209,498
General merchandise stores	$10,649,612	$4,946,455	$5,703,157	$15,085,855	$1,985,393	$13,100,462
Department stores	$6,762,543	$0	$6,762,543	$10,236,502	$1,985,393	$8,251,109
Other general merchandise stores	$3,887,069	$4,946,455	-$1,059,386	$5,849,353	$0	$5,849,353
Miscellaneous store retailers	$2,299,480	$1,385,875	$913,605	$3,580,943	$2,380,240	$1,200,703
Florists	$548,685	$93,309	$455,376	$891,327	$80,444	$810,883
Office supplies, stationery, and gift stores	$764,815	$702,083	$62,732	$1,169,910	$1,317,064	-$147,154
Used merchandise stores	$196,002	$79,554	$116,448	$297,626	$450,573	-$152,947
Other miscellaneous store retailers	$789,978	$510,929	$279,049	$1,222,080	$532,159	$689,921
Food service and drinking places	$26,675,079	$16,212,724	$10,462,355	$40,146,780	$19,125,452	$21,021,328
Full-service restaurants	$10,107,334	$7,064,211	$3,043,123	$15,231,476	$5,893,353	$9,338,123
Limited service eating places	$12,203,807	$6,033,397	$6,170,410	$18,311,530	$11,645,667	$6,665,863
Special food services	$1,840,829	$723,742	$1,117,087	$2,762,594	$0	$2,762,594
Drinking places - alcoholic beverages	$2,523,109	$2,391,374	$131,735	$3,841,180	$1,586,432	$2,254,748
Total – all categories	$172,199,430	$88,783,459	$83,415,971	$260,307,358	$258,440,402	$1,866,959
Total – excl. gasoline, motor vehicles & parts	$109,897,809	$53,380,543	$56,517,266	$165,534,818	$54,413,415	$111,121,403

Source: ESRI, R.A. Smith National, Inc.

The Madison area has two primary regional centers. East Towne Mall and West Towne Mall are anchored by full-line department stores and are surrounded by a large number of discount and specialty big box retailers. Hilldale Mall offers some competition for these due to its unique retailers. The proximity of East Towne is a significant challenge for retail on the Northside, as the variety offered by the many businesses there has effectively eliminated the advantage offered by being marginally closer to consumers on the Northside.



Map 7 - Retail & Service Competition for Madison's Northside

R.A. Smith National, Inc.

East Towne has also effectively captured much of the Northside's potential for community-level retail, as it has attracted the discount department stores and other retailers frequently found at this level. The Northside has shown exceptional weakness here, as Sherman Plaza (now the Northside Town Center) originally contained a department store and subsequently a discount department store (Prange Way). The only remaining "Northside" discount store is the Shopko north of Aberg Avenue. This store does not have a strong concentration of commercial activity surrounding it, and is isolated from residential neighborhoods.

Other areas competing with the Northside for community-level retail include the area around Highways 30 and 51 in Madison (Walmart, Farm & Fleet, etc.) and Sun Prairie (Walmart, etc.). Sun Prairie, in particular, is a growing competitor. That city is reviewing plans for Prairie Lakes, a new center designed with lifestyle shopping elements.

Deforest and Waunakee compete with Madison's Northside for neighborhood retail. Anchor uses in these communities are similar to the Northside and include groceries and hardware stores. Other competing neighborhood areas include the businesses on Shopko Drive, and Middleton. East Washington Avenue (between downtown and East Towne Mall) also provides some competition at this scale. Competition in surrounding neighborhood centers is similar to the businesses found on the Northside.

Neighborhood centers mostly contain retail and service businesses that people frequent on a regular basis. Given this, they tend to draw most of their traffic from people living or working nearby. There may be some overlap of trade areas, but mostly at the edges. Conditions within one of the neighborhood districts may influence how well it draws into another territory.

In the case of Madison's Northside, perceptions of the area make it unlikely that residents of the surrounding towns, Waunakee, or Deforest often come into the neighborhood to shop. Businesses at the south end of the neighborhood, on North Sherman Avenue, may be a little better positioned to draw shoppers from other Madison neighborhoods. The surrounding neighborhood centers are similar in quality and selection, but do not have the same negative perceptions (crime, low-end image, etc.) as does the Northside.

Retail Category Assessment

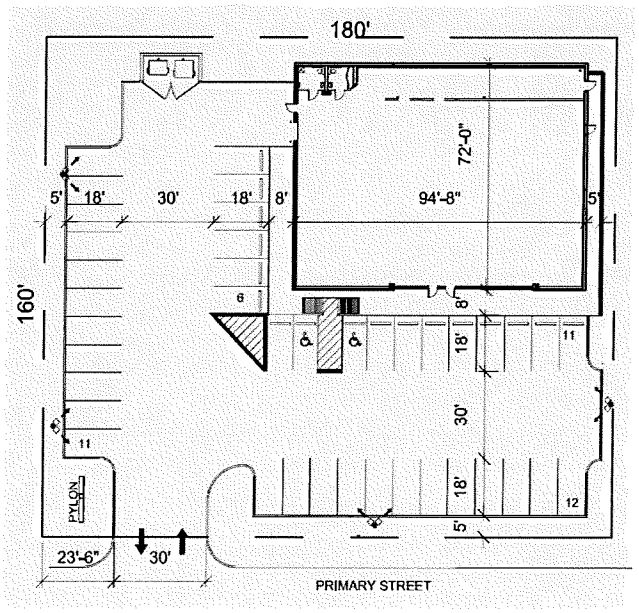
This section of the analysis will attempt to identify factors influencing sales within particular retail categories and to assess the opportunities for new store attraction or development within the Northside trade area.

Motor Vehicle and Parts Dealers

Some of the neighborhood stakeholders observed that the Northside "has more than its fair share of used car dealers." Sales figures for the combined trade area support that idea. These include the car rental agencies located at the airport. Used car dealers and other auto-oriented businesses, including auto service, are likely attracted to the neighborhood by lower land and building costs along with high traffic volumes.

Demand for these kinds of uses is anticipated to continue to be strong, especially as the City of Madison encourages redevelopment in other close-in neighborhoods, driving up property values and causing these kinds of uses to seek alternate locations.

The kinds of businesses included in this category are varied in terms of their site and space needs. A new or used car dealer will require an extensive parking area with a relatively small buildings for an office and possibly a showroom. Auto service centers will need circulation for at least four bays, and a building of 3,000 square feet or more. An auto parts store will typically be sized from 5,000 to 8,000 square feet.



One of several prototype site designs for Autozone, which is typically a 6,500 to 8,000 square foot building.

Of the possible locations for these businesses within the Northside's commercial districts, locations along Packer's Avenue and Highway CV would be most appropriate. Some

of the more customer-oriented businesses (for example, oil changing) could be suitable for locations on Northport Drive. Appearances, lighting, and vehicle storage can be a negative associated with these kinds of uses. The City should be prepared to deal with these concerns through zoning, design guidelines, or other regulatory mechanisms.

Furniture and Home Furnishings

The housing slump that first began to appear in the second half of 2005 has taken a toll on related industries, including sales of furniture and home furnishings. Many of this sector's large retail chains have closed or are struggling, including The Bombay Company, Pier 1, Linens 'n Things, and Wickes Furniture. Independent businesses in this sector have also taken a hit from declining sales. According to the International Council of Shopping Centers, furniture and home furnishings stores accounted for more than a quarter of all retail store closings in 2007.

The short-term prognosis for this sector is not good. Many purchases are triggered by moving into a new house, or by remodeling funded by home equity. Sharply declining sales and new construction, coupled with stagnant or declining home values, has put an end to most home furnishings retailer expansion plans for the time being.

Rising fuel costs may actually benefit this sector as people choose to spend more time at home, and are therefore more interested in making their home comfortable. The continuing entry of generation X and Y buyers into the market, with their interest in Madison's near east side, also promises to benefit these retailers.

Chain furniture and home furnishings stores will continue to prefer locations near East Towne and West Towne Malls. Independent store owners may be drawn to locations on North Sherman Avenue, especially if redevelopment begins to occur in this area. The primary competition will be locations on Williamson Street, Monroe Street, Atwood Avenue, and other neighborhood commercial streets. Typical space requirements for these uses will be 1,000 to 3,000 square feet.

Electronics and Appliance Stores

Despite the weak performance of many consumer electronics chains in recent years, this sector is showing signs of growth. *Marketing Daily* reports that "consumer electronics, including flat-screen TVs and video games, seems to be one of the very few categories that has benefited as consumers become even more entrenched in cocooning to save money." It goes on to report that 43 percent of people responding to a survey report spending more on their homes, with consumer electronics on the top of the list.

Appliance sales have slowed with a decline in new construction and home sales. The age of the housing stock in the primary Northside trade area and southern portion of the secondary trade area suggests, however, that home renovation may become more widespread as younger buyers replace aging owners.

The Northside does not have the market to support a big box category store such as Circuit City or Best Buy. It may have an opportunity to attract a smaller chain or independent appliance and electronics store. A typical store of this type might have about 10,000 square feet of space with sales of about $1.5 to $2 million. Examples of such stores include Aaron's Appliances, Rex TV and Appliances, and Rent-A-Center. They will typically seek lease space in a strip center.

Building Materials, Garden Equipment, & Supply Stores

The neighborhood's two hardware stores and Jung's Garden Center are capturing a healthy market share. Traditional hardware stores such as Dorn's and Meikle's compete effectively against the likes of Menards and Home Depot by offering more convenient locations and shopping in addition to service. Jung's is likely one of few businesses in the neighborhood that can effectively draw shoppers from Waunakee and the neighboring towns.

Food and Beverage Stores

ESRI's data appears to underestimate grocery store sales in the trade area. In closer examination, Pierce's Northside Market is estimated to have less than $1 million in annual sales. R.A. Smith National revised this to $8 million for the purpose of assigning market share to define the trade area. Using this new figure will reduce sales leakage for groceries to about $20 million from the combined trade areas.

Madison's grocery market is unusual in that Woodman's two stores draw regionally, whereas most grocery stores serve a neighborhood. Their massive stores, with great variety and low pricing, will continue to siphon off grocery sales from the Northside along with other parts of the community.

Wal-Mart has recently entered the grocery market with a supercenter on the south Beltline. It is too early to clearly see the result of this new store, but it can be expected that Wal-Mart will seek to open other supercenters at the periphery of the City of Madison, including the possibility of a location to the north, perhaps near Highway 19 and Interstate 39-90-94. This will present additional competition for the Northside's food dollars.

Pierce's Northside Market

The Copp's on Shopko Drive has strong sales, and competitors in neighboring communities are performing well. Given these conditions and the level of consolidation within national and regional grocery store chains, it does not appear likely that a new full-line grocery store can be attracted to the Northside.

The Northside may be attractive to a store such as Aldi. This parent company to Trader Joe's is often dubbed "the German Wal-Mart." Its stores are about 10,000 square feet and are stocked with no more than 1,500 items. Aldi's low price focus will make it more suitable for the northern part of the area, although a more southerly location could be considered. Use restrictions (lease exclusions) at Northside Town Center will force any new grocery to locate elsewhere.

Health and Personal Care Stores

About $3 million in potential sales is lost from this category in the primary trade area, with just under $10 million in leakage from the combined primary and secondary trade areas. It does not appear, however, that there an opportunity to capture these lost sales.

Walgreen's is the largest health and personal care store on the Northside, accounting for a majority of the sales in this category. Given the local dominance of this chain, an examination of Walgreen's store locations in Madison provides a good overview of the segment. The Northport Drive store serves the northern half of the trade area along with some customers further to the north. Stores on East Washington Avenue near Johnson Street and Blair Street serve the southern part of the trade area. Stores in Waunakee, Deforest, and Sun Prairie ring the trade area to the north.

Besides pharmacies, other kinds of stores in this category include those that sell products like cosmetics, nutritional supplements, and home health aids. These tend to be small stores occupying 1,000 to 2,000 square feet in strip centers.

Gasoline Stores

The high traffic volumes on arterial streets in this neighborhood support strong sales at gasoline stations. Associated convenience store sales are high and are benefitted by having a nearby population of persons without access to a vehicle. Given the number of commuters using Northport Drive and Highway CV, sales at these types of stores could likely be higher. The limited access and difficult turns caused by the streets' design is likely curbing sales.

It does appear that the neighborhood could support additional gas stations with convenience stores. Northport Drive and Highway CV are the most likely locations. Future plans for the airport to have access from Highway CV will likely result in a demand for stations in this area.

Clothing and Clothing Accessories Stores

If 2007 was the year in which furniture and home furnishings stores dominated the list of closing stores, then 2008 is shaping up to be the year for apparel. In this environment it should not be expected that new clothing stores would consider locating on the Northside.

Clothing stores tend to cluster near each other to draw shoppers. The Northside has lost a majority of the clothing stores it once had, along with its department and discount stores. Without more stores and an anchor use to draw customers, there are few opportunities to attract new clothing stores.

If North Sherman Avenue can attract redevelopment as an urban mixed-use district, there may be the potential for unique clothing and accessory retailers in this area. These will typically be independent and small chain stores requiring 1,000 to 3,000 square feet. The Northside Town Center may be more attractive to a discount-oriented family clothing store. Although not in the Madison market, stores such as Goody's Family Clothing and Stage Stores are representative of this type of business.

The strong performance of jewelry stores is a reflection of Maple Bluff's economic influence on the southern part of the secondary trade area.

Sporting Goods, Hobby, Book, and Music Stores

The departure of Hancock Fabrics from Northside Town Center may be taken as an indication that the center is not drawing from a large population base. While sales were too low to support a store of this size, it seems likely that the

market could support a smaller store in the sporting goods or hobby category. The most likely candidate would be a franchise or independent store. Examples might include stores such as Hobbytown USA or Play It Again Sports. Its location would depend on the merchandise and services it offered.

General Merchandise Stores

Family Dollar is the primary general merchandise store on the Northside. There are no longer any full-line department stores or discount stores in the trade area, as the number of chains in this sector has decreased and the remaining stores have concentrated on Madison's east, west, and south sides. Future discount store development is expected to occur in Sun Prairie. In a more extended time frame, there is a potential for development to the north along the Interstate in the Waunakee or Deforest areas.

With a relatively small population, and given the pattern of regional competition, it does not appear to be likely that the Northside can attract an anchor general merchandise tenant. The market may support smaller general merchandise or variety stores similar to Family Dollar (such as Dollar General or Dollar Tree) and even smaller operations. The typical variety store will occupy 8,000 to 12,000 square feet.

Demographics of the primary trade area are a good match to those desired by the variety store chains. These stores are expanding in a slowing economy, and are increasingly becoming attractive to more upscale customers. As with grocery stores, this use may be excluded from Northside Town Center due to lease provisions.

Miscellaneous Store Retailers

This category includes florists, office supplies, gift stores, used merchandise, and other stores. These have tended to perform relatively well on the Northside, particularly in and around Northgate Shopping Center.

Existing stores are capturing a majority of the market as well as drawing in customers from elsewhere in the community. This suggests that there may not be an immediate opportunity to attract other stores in these categories. A newly opening used merchandise store in Northgate Shopping Center will be replacing one that recently closed.

Future opportunities are tied to possible redevelopment, particularly along North Sherman Avenue.

Food Service and Drinking Places

Neighborhood stakeholders noted a lack of full-service restaurants in the neighborhood. It was also observed that Hardee's and then Popeye's have closed in the same location on Northport Drive. A new Italian restaurant has opened on North Sherman Avenue while a Mexican restaurant on Packers Avenue recently closed. The neighborhood also includes popular restaurants such as Manna Café, Benvenuto's, and the Esquire Club.

Data from ESRI indicates leakage of about $10 million in potential full-service and limited service restaurant sales from within the trade area. This does not consider the potential sales associated with a nearby work force. Of these, the 6,380 employees along Packers Avenue and the 8,916 employees at the airport and surrounding business parks represent the primary employment in the area. The Packers Avenue total includes 2,500 employees at Oscar Mayer who tend to take lunch at work. The airport total will also include a large number of employees who will find it difficult to leave the airport property for lunch. This is estimated at about one-third of the total.

The National Restaurant Association has reported that three out of four full-time employees eat out at lunch at least once per week, spending between $5 and $10. Assuming that there is a pool of approximately 7,000 nearby workers who can easily visit restaurants at lunch time, and they spend an average of $8, their weekly expenditures would total $56,000. This works out to an additional $2.9 million in restaurant sales potential annually.

Employees in the airport business parks who participated in the stakeholder interviews commented that they rarely ventured into the Northside neighborhood for lunch. East Washington Avenue is an equal distance and offers a much greater variety. A few Northside full-service restaurants were noted as exceptions to this.

Fast food restaurants rely on lunchtime traffic for the largest portion (46.88 percent[4]) of their sales. Traffic patterns, a low daytime population, and nearby employees eating elsewhere suggest that lunchtime traffic may not be sufficient to sustain more than a few fast food restaurants on the Northside. In contrast to this, full-service restaurants rely on lunchtime customers for only 31.91 percent of sales. These restaurants tend to be supported by residents of the area.

Dining out has been growing in popularity in recent years, and has been a significant factor in the shift of expenditures away from grocery stores. As with other discretionary spending, current economic conditions have begun to curtail consumer spending at restaurants.

[4] Economic Research Service, USDA

The analysis here raises doubts about the opportunity to attract more fast food restaurants to the Northside study area. However, there does appear to be support for more full-service dining options.

Lodging and Entertainment

Questions have been raised about the potential for a hotel on the Northside. City staff have suggested possible site for a hotel at the corner of Northport Drive and North Sherman Avenue. The Dane County Regional Airport has identified a potential site adjacent to International Avenue.

At this time, conditions do not appear to be favorable for a hotel in either location. The Northport Drive location is an especially poor location, as it does not have any travel-related vehicle traffic passing by the site, and there is an insufficient base of businesses to generate business traffic. Activity related to Warner Park is generally local and would not support a significant number of hotel stays.

The airport location is a somewhat better site. Travelers from outside of the area may choose to stay there due to its proximity to the airport. However, hotels on East Washington Avenue are only marginally further from the airport. These hotels, as well as those in the downtown or on the west side all have an advantage in being closer to the City's businesses, tourist attractions, and amenities such as restaurants.

Entertainment and related business may include theaters, health clubs, or activities such as bowling, pool, golf, and other games. These potential uses are discussed below.

- Theaters – There are seven regular movie theaters in Madison and one in Fitchburg. These are in high-traffic locations, typically near the Interstate or Beltline. They also have good access to nearby shopping and dining. Given the Northside's weak drawing power and the proximity of theaters at East Towne Mall, it is unlikely that the Northside could support a movie theater.
- Health Clubs – Madison has a very well-developed fitness market, with strong local companies such as The Princeton Club, which has locations on both the east and west side of the community. Smaller, as well as specialized facilities are scattered throughout the City.

  Within the trade area, the Warner Park Community and Recreation Center will meet some of the need for a smaller gym that is "close to home." Annual membership is very affordable at $120 for an individual. This compares with rates from about $200 to $400 at neighborhood-level competitors such as 24 Hour Fitness or Snap Fitness. The advantage to these clubs is their extended hours. Businesses such as Curves cater to a particular segment of the population. There is a Curves franchise located at the Northside Town Center.

  The Northside may be able to support an additional fitness center such as 24 Hour Fitness or Snap Fitness. While space at the Northside Town Center is appropriately configured for this type of use, perceptions that the center is unsafe at night would discourage it from locating there.
- Bowling, billiards, golf, etc. – There are a number of different types of indoor sports or game centers that may be considered for locations on the Northside. These may include bowling and pool centers, rock climbing walls, indoor soccer or volleyball, driving ranges, and more. Given the presence of Warner Park and the Cherokee Country Club, there may be some synergies to these uses. For example, there is a golf driving range at the country club.

Supply of Retail Space

LoopNet[5] identifies 65 retail properties for lease in the City of Madison, ranging from very small spaces under 1,000 square feet, to the largest space over 200,000 square feet. They total just under 970,000 square feet. Lease rates range from $7.59 per square foot to $48 per square foot.[6] Lease rates are highest for newer buildings in the downtown. The average for all available properties is $17.84 per square foot.

Seventeen retail properties in surrounding communities add another 508,000 square feet of space available to lease. The average rate is slightly less than Madison, at $16.21 per square foot.

Only three retail stores are listed for lease in the Northside trade area. These include space in both Northgate Shopping Center and Northside Town Center. They total about 123,000 square feet and lease at an average of $11.66 per square foot. This includes the 48,910 square foot former Copp's store, which is available to sublease at $10.00 per square foot.

Lease rates on Northside properties reflect the area's status as a secondary retail district, as well as the age and condition of some of the properties.

[5] Listed on September 9, 2008

[6] Because lease terms vary, this number should be regarded as an approximate measure of the true cost to lease space.

Overall, it appears that the aggregate amount of commercial space on the Northside is adequately matched to the existing and potential demand. Unfortunately, the configuration of this space is not well matched to the types of businesses considered most likely to locate within the area. This is most obviously apparent in the former Kohl's grocery store, which is much larger than any use contemplated in this analysis. Furthermore, the dimensions of this building make it hard to divide the space into smaller units (at least under 10,000 square feet) that might lease more quickly.

One possible approach to the former Kohl's store would be to divide the space to create a large office space along the back of the building, oriented to parking in the rear. With less depth, the front of the store could more easily be subdivided into smaller units that could be leased to commercial tenants.

Considerations

The following observations pertain to the retail environment on Madison's Northside.

- Current economic conditions suggest that there are few immediate opportunities for retail development on the Northside.
- A handful of retail categories may present future opportunities for new business development on the Northside, including motor vehicle retail and services, furniture and home furnishings, electronics and appliances, gasoline stations with convenience stores, and sporting goods or hobby stores. Less likely opportunities include food stores and general merchandise.
- These potential new stores will all have a generally small footprint. It is likely that there is now enough retail space on the Northside to accommodate any new retail that can be attracted. The problem may be that current space may not be ideally sized or in good condition. For example, the former Kohl's grocery store is too large for those businesses likely to consider the area. Redevelopment may be necessary in order to create the kind of space potential retailers find desirable.
- North Sherman Avenue may present an opportunity for mixed-use development. Specialty retail is currently successful in this area. Redevelopment may add additional customers to support even more.

Newly constructed housing makes up only a very small percentage of all new homes sold in the United States. The value of existing housing, and hence the viability of existing neighborhoods, is therefore often a question of how well the characteristics of existing homes meet the desires of potential buyers. The answer to this question becomes very convoluted when it is considered that the Northport – Warner Park – Sherman Neighborhood has a wide variety of owner and rental housing types, and that preferences of the market are themselves widely different depending on factors such as age, ethnicity, and household formation. These forces generally work to the neighborhood's advantage, however, and should help to sustain a healthy housing demand.

Generational and Ethnic Preferences

Current housing conditions as well as housing preferences can be highly correlated to variables such as age and ethnicity. It is therefore useful to provide a brief summary of some of the distinguishing characteristics of segments in the population as a starting point for the housing market analysis.

Depression and World War Two Generation

These are the oldest Americans (born prior to 1945) and are often living in the oldest housing, or retirement homes. As they moved into their retirement years in the mid-1980's to mid-1990's they relocated to Florida and Arizona, became snowbirds with two homes, and purchased low-maintenance condominiums in suburban locations. As they continue to age they are expected to seek out independent or assisted living housing, especially as one spouse becomes incapacitated or dies. A rapidly decreasing share of this group is likely to consider a home purchase at this stage in their life, although in the past they were the fuel for age-restricted developments all over the country. Those selling homes they have lived in for extended periods may experience a loss of equity or difficulty selling in the existing market, especially if maintenance has been deferred or the home has not been recently updated.

Baby Boom Generation

The largest generation in U.S. history (born 1945 to 1964) is 78 million strong and makes up 28 percent of households in the country. While much has been made of the oldest members of this generation reaching retirement age (62) in 2006, it should not be missed that the younger households are still among the most likely buyers of larger and more expensive housing as their rising income (and children moving out) allows them to upgrade.

In general, this generation has seen a large home with a yard as the "American Dream." As they age, members of this generation are expected to continue to value home ownership. This will manifest itself in renovations that allow aging boomers to continue to function within their existing homes, and in a market for condominiums that provide reduced maintenance. A growing number of these empty-nesters and retirees are expected to reject age-restricted communities, favoring more active, exciting, and multi-generational environments.

Generation X

Younger buyers are fueling the trend toward urban living. Members of generations X (born 1965 to 1980) and Y (born 1981 to 1994) are alike in that many of them will prefer to live in active urban environments that offer shopping, dining, and entertainment in close proximity to living. They are the buyers in traditional neighborhood developments and walkable urban neighborhoods.

In Generation X there is a tendency to value quality of finishes over square footage. Many members of this cohort will prefer smaller homes and smaller yards that place fewer demands on their time. Open floor plans are a strong selling point, which poses some challenges for the desirability of existing, older housing stock.

The youngest of these buyers may still be making their first home purchases, while the older members of the generation are now entering the "move-up" phase of the housing cycle.

Generation Y

Like Generation X, Generation Y is attracted to an urban lifestyle. The youngest households in the housing market, they comprise a large part of the demand for rental units. As they form families they will be an increasingly larger share of first-time home buyers.

These buyers and renters are like the previous generation in preferring open floor plans. They are attracted to multi-unit buildings (condominiums) that offer interesting design and the latest technology, with few maintenance requirements. There may be a discrepancy between these preferences and the more affordable, typically older homes that come into the market in places such as the Northside. One possible response to this would be an increase in home renovation.

Hispanics

Latinos are the largest group of immigrants and the fastest growing ethnic group in the United States. Hispanic households tend to be large and include multiple generations as well as extended family members. As a recent immigrant group they tend to have lower incomes and gravitate toward more affordable, usually older housing. Home ownership is important, and home purchases may be made by pooling family resources. Because of their large household size, there is a preference for homes that can be easily expanded to meet family needs. Large kitchen and eating areas may be desirable features. Because there are likely to be several workers in the household, adequate parking can be an issue.

Asians

Asians are a growing demographic within Madison. As a group, they tend to have higher incomes than most households. Their housing preferences do not differ significantly from those of the general population.

Multi-Generational Households

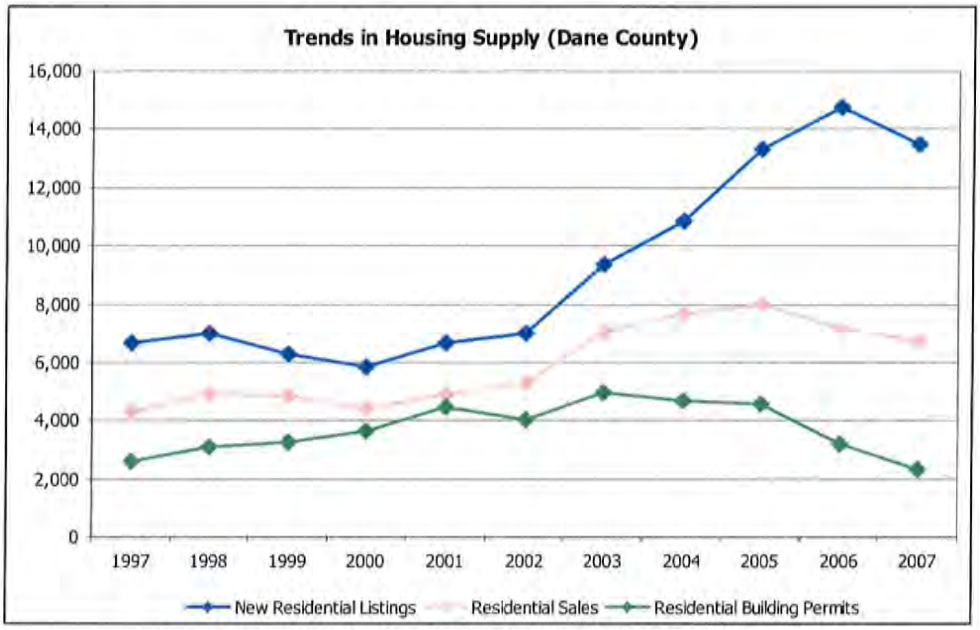
There are a growing number of multi-generational households in America. Many factors are contributing to this trend, including grown children who wait longer to form a household, single parents who live with their parent due to financial or child care needs, and aging parents who live with an adult child caregiver. Immigration and ethnic make-up also contribute to this trend. One of the market implications of this trend is a desire for separate living quarters. This can increase demand for features like mother-in-law suites or accessory dwelling units.

General Market Trends

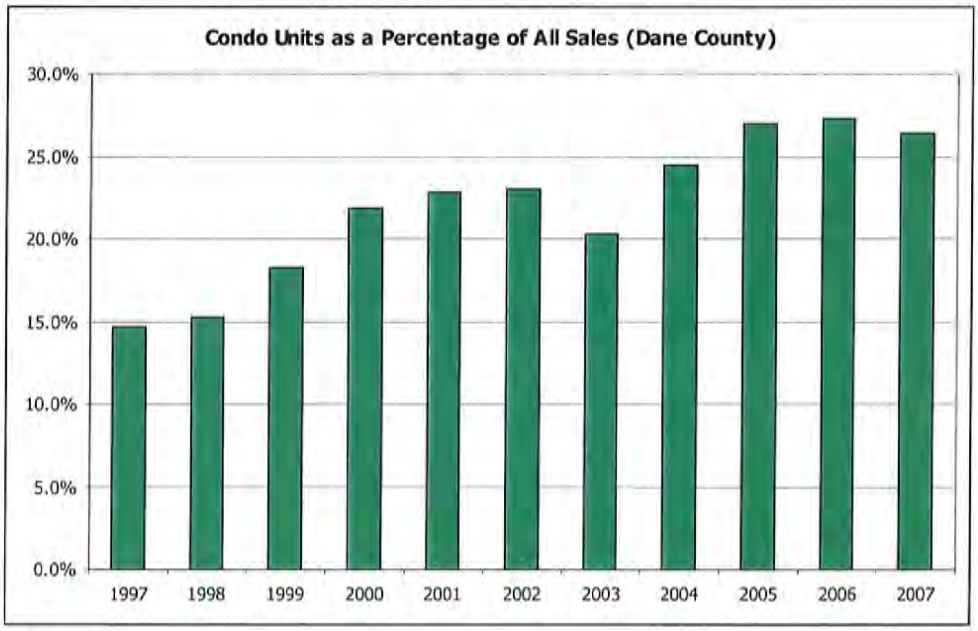
The national housing market began to falter in 2006. While the slump has been much more severe in other places, Madison has so far proven to be a relatively stable market. Although growth in home values has slowed, the typical Madison home still increased in value by 2.8 percent over the 12-month period ending in June of 2008[7].

Housing Supply

An analysis of housing trend data for the past decade shows the effects of a market slowdown as an increasing gap between the number of residential sales listings and the number of housing units sold[8]. This gap began to widen in 2004, to where it is about three times the number typical of



Source for charts: Wisconsin Realtor's Association, US Bureau of the Census



[7] Zillow.com

[8] Realtors Association of South Central Wisconsin, 2008

the first several years in the series. In 2007 there was a drop in the number of homes listed for sale as the market began to correct itself. Preliminary data for 2008 suggest that the number of home sales is continuing to decline. Concerns about a weakening economy, declining home values, and more restrictive mortgage financing are keeping buyers out of the market for the time being.

Residential building permit data obtained from the U.S. Bureau of the Census shows that new construction began to slow in 2004, and then dropped sharply in 2006 and 2007. That downward trend is continuing into 2008. This trend mirrors home sales data.

Foreclosure Influences

The national rise in home foreclosures has received a good deal of media attention and is likely influencing some potential buyers, as well as helping to depress home values. This crisis is related to the introduction and more wide-scale use of non-conventional mortgages that began in the early 2000's. Many interest-only, balloon, "teaser rate" and other mortgages reset to much higher payments anywhere from two to five years after the initial mortgage is written. Buyers using these products may have planned poorly, or were relying on an expected increase in the home's value to enable refinancing at more reasonable levels. In either case, their inability to make mortgage payments and declining values have placed a record number of homes in foreclosure.

Even though banks have tightened lending requirements, there are still a large number of homes that have been financed in recent years with sub-prime mortgages. Loans written from 2005 through 2007 are still resetting to higher payments and may trigger more foreclosures. The impact of new federal legislation to aid homeowners with mortgage problems is yet to be measured.

It is estimated that about one in every 500 homes in the United States is currently in foreclosure[9]. The rate for Wisconsin is one in every 1,239 homes. In Dane County this rate falls further to one in every 1,889 homes. The greatest number of foreclosed homes are found on Madison's east side. This includes three pockets on the Northside of the city; south of Wheeler Road, north of Aberg Avenue between North Sherman Avenue and Packers Avenue, and north of East Washington Avenue south of Aberg Avenue. Very few foreclosures were noted north of Wheeler Road, in Maple Bluff, or on the west side of Northport Drive north of Warner Park.

In total, RealtyTrac listed 563 properties in the City of Madison in pre-foreclosure, at auction, or bank-owned in September of 2008. Of these, 78, or 13.9 percent, were located within the Northside. This raises concerns about the stability of these neighborhoods. Foreclosed homes have attracted criminal activity, disinvestment, and declining property values in other communities. The City of Madison should be aware of similar concerns here.

Rental Housing

Several large apartment communities are located in the vicinity of Northport Drive and Packers Avenue. A large number of these units are marketed to low-income renters. Other multi-unit rental buildings and single-family home rentals can be found primarily south of Northport Drive. Anecdotally, there has been a recent trend to convert formerly owner-occupied homes to rental units, due to their low cost and a slow sales market.

Future Demand

Housing development and the demand for new housing on the Northside will lag other parts of Madison and the metropolitan area. Furthermore, the housing market generally will remain weak until the inventory of available properties comes more in line with sales. Increases in new construction will follow still later. Depending on demographic trends and the health of the economy, this situation may take some years to rectify itself.

R.A. Smith National does not anticipate an immediate demand for new housing development on the Northside. As the housing market improves, we believe there are a handful of opportunities that appear most likely.

Age-Restricted (Senior) Housing

There are currently 2,271 persons in the primary trade area who are aged 65 or older[10]. This number is projected to increase to 2,475 by the year 2013. The secondary trade area contains another 1,201 persons 65 or older, with a projected increase to 1,334 by 2013. This will result in an increase of 337 persons 65 or older in the combined primary and secondary trade areas. At that time there will be a total of 3,809 people in that age cohort, and another 3,639 people between the ages of 55 and 65.

The North/Eastside Senior Coalition has identified four age-restricted senior apartment communities on Madison's Northside. These include East Shore Apartments (22 subsidized units), Dryden Terrace Apartments (100

[9] RealtyTrac, 2008

[10] ESRI, 2008

subsidized units for age 62 and older), Sherman Glen (98 units restricted to 55 and older), and Williamstown Bay North (40 units restricted to age 55 and older). These total 260 units.

Specific data on the age of residents is not available. This analysis assumes that 80 percent of the units are rented to persons 65 and older, and 20 percent are rented to individuals between 55 and 64 years of age. The works out to about 5.9 percent of the current trade area population aged 65 and older, and about 1.6 percent of the population between 55 and 64.

Using a conservative estimate that five to seven percent[11] of the area's population aged 65 and over, and one to three percent of people 55 to 64 years of age will choose to live in age-restricted senior housing. the 2013 population of the Northside will support an additional 20 to 40 units. This assumes that all of the new demand for units will originate from within the Northside trade area. New age-restricted communities on the Northside could capture demand from other parts of the metropolitan area, perhaps doubling the number of units that could be supported.

The North Sherman sub-area may be the most desirable location for these units. The concentration of low-income housing near Northport Drive, along with perceived safety concerns in that area would be a deterrent to elderly residents.

Empty-Nester Housing Development

Three-quarters of households headed by a person over the age of 60 live in conventional housing. As noted earlier in this analysis, these households have certain preferences for the kind of housing in which they live. Many are trading up, or at least maintaining their current level of housing. The Cherokee subdivisions have been aimed at this market.

Demographics for the northern part of the secondary trade area clearly indicate the attractiveness of these homes for pre-boom and baby boom generation buyers, many of whom are headed by persons in their sixties or at least in their fifties. The age cohorts associated with this kind of housing, which includes a significant share of condominium units, will continue to grow for the next decade, sustaining demand.

[11] The National Institute on Aging estimates that seven percent of the population age 60 and over live in age-restricted communities. Another five percent live in age restricted communities where personal care support is provided. Ten percent are in shared living situations where a younger care-giver lives in the same household.

Urban Living

The average age for first-time home buyers is 33 years while the average age for move-up buyers is 45 years[12]. Two-thirds of first-time home buyers are under 35. About 20 percent of the homes purchased by these buyers are condominiums.

Potential home buyers between the ages of 25 and 44 make up a little over 30 percent of Madison's population. They include the "Metropolitans" Consumer Tapestry segment that dominates Madison's near east side. These residents are members of Generations X and Y who "favor city living in older neighborhoods" and "these neighborhoods are an eclectic mix of single-family homes and multiunit structures."

These homeowners dominate Madison's near east side neighborhoods including Marquette, Schenk-Atwood, Emerson East, and Eken Park. The Madison Assessor's office has noted that values of existing residential properties in these areas have risen more rapidly than in other parts of the community. New development found throughout these areas has typically consisted of residential condominium or mixed-use buildings. Locations tend to be on arterial streets in close proximity to shopping, restaurants, entertainment, and recreational amenities such as bike paths or the lakes.

The ongoing spread of redevelopment outward from neighborhoods closer to the isthmus attests to the impact of these buyers. The more recent movement of these buyers into the Emerson East neighborhood suggests that the southern portion of North Sherman Avenue may become a future target neighborhood, providing a market to support redevelopment. This can be encouraged by participation from the City of Madison in targeted projects to "seed" revitalization of the area. The City may also consider actions to improve area aesthetics or to address traffic and safety concerns of existing residents.

Mendota Mental Health Center

During stakeholder interviews a few participants mentioned the long-term possibility that the Mendota Mental Health Center could be closed and made available for development. This analysis did not make a detailed attempt to assess the site as a possible residential redevelopment opportunity. The site is in one of the more attractive and stable parts of Madison's Northside. Furthermore, it has several hundred feet of Lake Mendota frontage. These characteristics lend themselves to a different pattern of uses than considered for

[12] American Housing Survey, 2005

elsewhere on the Northside, targeted to a higher-income buyer. The site will likely support a combination of multi-unit and single-family homes, and may be appropriate as a traditional neighborhood development.

Immediate Concerns

The Northside is attractive to many buyers in that it contains some of Madison's more affordable housing. As noted in this analysis, the Northside has some of the City's older housing, has a large number of the City's foreclosed homes, is potentially seeing an increase in conversion of homes to rentals, and is perceived as having a crime problem. These are issues that can be addressed immediately, without the need to wait until the housing market improves. In fact, action to address these concerns can help to stabilize the neighborhood and position it to be a more attractive location when the pace of development picks up again.

The Housing Relief Act recently passed by the Federal government will provide $3 billion in funds to communities to allow them to purchase and renovate foreclosed homes. Wisconsin is expected to receive an allocation of $57 million. The City of Madison may apply for some of these funds, and may consider targeting them to the Northside and other pockets of high foreclosure activity. Acquired properties may be land banked for future redevelopment, or renovated and resold to owner occupants. Retaining them as rental properties will not be desirable, as the City should be working to maintain levels of owner occupied housing in the neighborhood.

OFFICE MARKET ANALYSIS

Office uses have been an important source of employment and a major land use on the Northside. These are concentrated around the airport. This section of the analysis looks at office market conditions to identify opportunities and threats for the Northside.

It is important to take note of an unusual condition impacting the Northside's office market. The airport has developed its office parks with a land lease. A land lease can be a disincentive to development as the developer will not realize future appreciation in land value, and will generally transfer ownership of any improvements at the conclusion of the lease.

This condition has resulted in buildings that, while functional and reasonably attractive, are not of the same quality as comparable buildings in other parts of the community. As a result, the majority of space available on the Northside may be deemed Class B space.

Supply of Office Space

National office vacancy rates have been increasing slightly during the past four quarters to a current average of 13.5 percent.[13] Still, rates are no higher than they were in 2006. The Midwest region has a slightly higher average at 15.8 percent. New construction remains strong.

Grubb Ellis | Oakbrook Research reports better performance within the Madison market. Vacancy rates for all office properties stood at 12.1 percent at the end of 2007, with an 8.2 percent rate for Class A space, a 15.0 percent rate for Class B, and a 22.3 percent vacancy for Class C. A majority of the office property on the Northside would be considered Class B space. The east side and the near west side have the highest vacancy rates of any areas within the metropolitan region, at 18.0 percent and 19.1 percent respectively. These are consistent with a three-year average.

Oakbrook Research identified 249,945 square feet of new office space completed in 2007, with another 762,744 under construction. New construction planned but not yet started will add another 258,500 square feet. A majority of these buildings are being built in Madison's south and far west sub-markets.

There are currently 125 office properties listed for lease in the City of Madison.[14] These range in size from a few hundred square feet to over 100,000 square feet, and total 1,579,093 square feet. The average lease rate is about $15.60. Another 30 properties in surrounding communities add 384,964 square feet of space at a nearly identical average lease rate.

Competitive Analysis

Five properties are currently listed on Madison's Northside, offering a total of 104,115 square feet, or just over five percent of the total office space available. Lease rates for listed space on the Northside average $11.57, which is a reflection of the predominance of Class B space in the area, along with lower land costs.

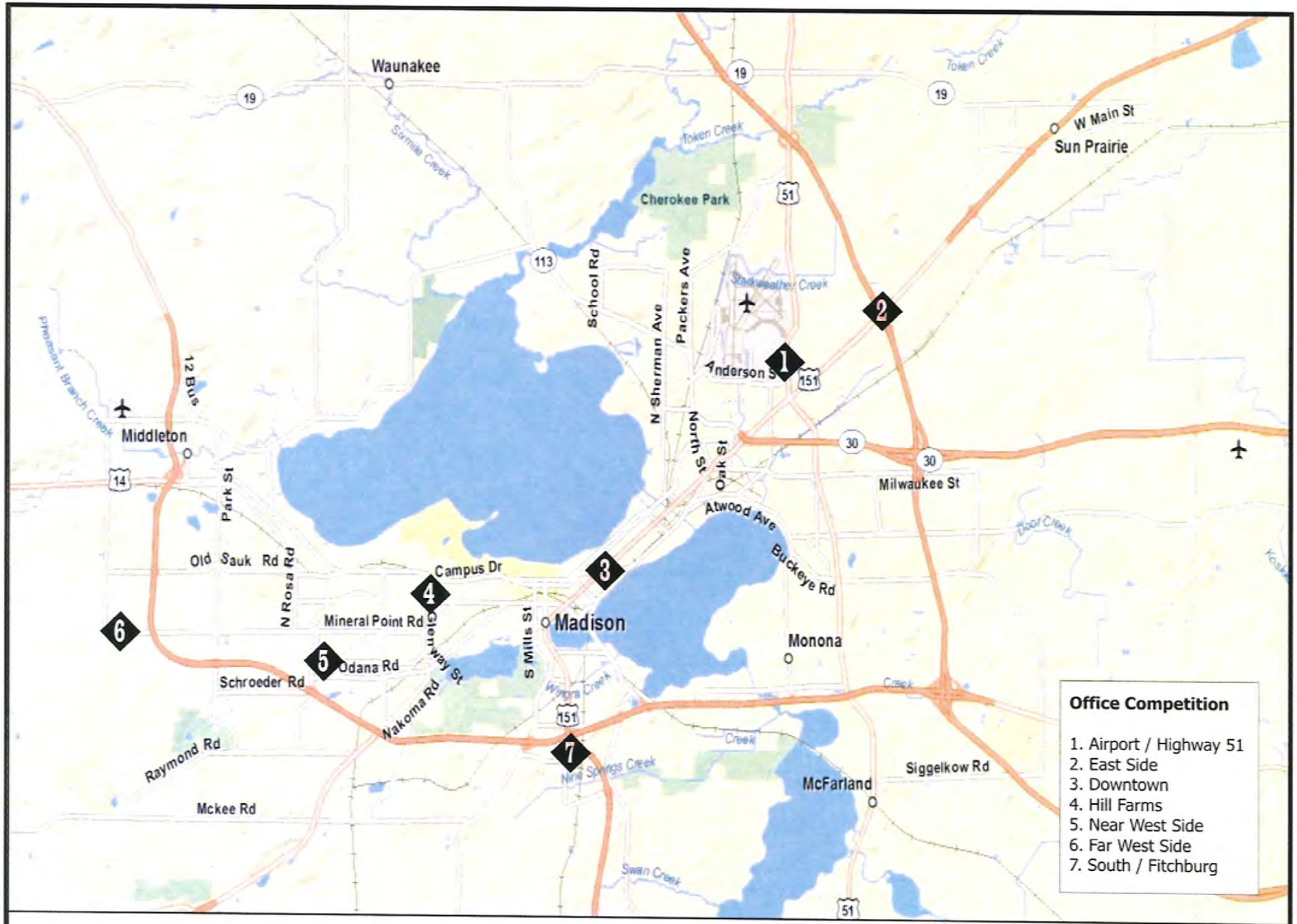
While some neighborhood stakeholders believed there has been a lowering of office rents as new buildings have been added in other parts of Madison, there is no evidence to show any downward trend. Rather, it seems likely that there is ample competition in similar rent ranges in other parts of the metropolitan area. Twenty percent of the available properties in Madison are listed at or under $11.50 per square foot, and another 20 percent are listed between $11.50 and $12.00 per square foot. The median rent is $13.50 per square foot. These properties (including four of the five listed on the Northside) will be the primary competition for Northside office buildings.

Besides the airport business parks, Madison's office space is clustered in the downtown, along Interstate 39/90/94 on the east side, on the south Beltline, at Hill Farms, and along the west Beltline. The south and west Beltline, followed by the east side and downtown, have seen the most recent activity. These locations offer some combination of better access to Interstate highways, proximity to an educated work force, community amenities, improved aesthetics, and higher visibility.

Madison's Northside offers some cost advantage against the downtown in particular, but not necessarily the other competing locations. It is the location of choice for activities related to the airport, such as offices for airport security, and may also be desirable for logistics functions.

[13] CB Richard Ellis, National Office Vacancy Index, Second Quarter 2008

[14] LoopNet, September 9, 2008



Map 8 - Office Concentrations in the Madison Area

R.A. Smith National, Inc.

The Northside has many small office spaces in its commercial districts. This "commercial" space has been addressed in the retail analysis.

Considerations

The following observations summarize conditions related to the supply and demand for office space on the Northside.

- The Madison office market has performed very well for several years, as the City has attracted operations of "new economy" companies that have continued to expand. This has fueled construction and maintained a consistent supply of space at all levels of quality.
- The Northside does not compete for Class A office space. The lease rates asked for it's Class B space have it competing with 40 to 50 percent of the market.
- Class A space will typically be attracted to more visible locations and clusters of higher-profile businesses, such as are found along the Beltline and Interstate highways, and in downtown Madison. The Northside is correctly positioned with primarily Class B space.
- There is currently about two million square feet of office space listed in the metropolitan area, with another one million square feet planned. This may cause a decline in construction for 2009 and 2010 as the market absorbs this space.
- General economic conditions remain mixed. An economic slowdown may lead to higher vacancies and less demand for office space.
- Area-wide improvements to "brand" the airport industrial parks may improve the area's ability to compete with other locations in the metropolitan area. This might be accomplished by extending the airport's design and landscaping themes into the airport business parks to create a unified identity.

INDUSTRIAL MARKET ANALYSIS

This element of the market analysis assesses conditions related to industrial and warehouse development on the Northside. There are several existing industrial or flex buildings on the Northside, with additional land on Highway CV or the airport industrial parks available for development.

Supply of Industrial Space

There are currently 18 industrial properties listed for sale, and 47 industrial spaces for lease within Madison and the surrounding communities[15]. Because properties may be listed both for sale and lease, there is some duplication in these lists. Because not all properties are listed on LoopNet, these should be regarded as a representative sample rather than a complete inventory. Regardless of this, there is approximately 300,000 square feet of industrial space for sale, and 575,000 square feet of industrial space available for lease within the metropolitan area. Properties on the Northside account for about a quarter of all industrial property for sale, and about ten percent of industrial lease space.

The average size of all properties for sale was about 16,400 square feet, with a range from 4,000 to 43,500 square feet. The average asking price was about $72 per square foot. Five of these properties were located on the Northside or in the vicinity of the airport. Similar to the full list of industrial properties, these Northside properties averaged about 16,000 square feet in size. They were significantly different in asking price, though, averaging only $44.40 per square foot.

A review of listing data suggests that there is little difference in the overall character or quality of industrial properties for sale. A majority are metal sided or precast concrete, with the concrete buildings tending to be divided for multiple tenants. The same may be said about lease properties, although some of the larger buildings available for lease demonstrate a higher quality of design and landscaping than typical.

Six industrial properties are available for lease on the Northside. These properties average about 10,000 square feet, although some may be divided to smaller units from 1,250 square feet on up to 16,000 square feet. The average lease rate is about $4 per square foot. In contrast, the average lease rate for all available industrial lease spaces is about $6.50 per square foot. The average size of all of the available spaces is larger as well, at a little over 12,000 square feet.

[15] LoopNet, September 9, 2008

Industrial Market Performance

Madison's industrial market absorbed 716,918 square feet of space in 2006, and 895,037 square feet of space in 2007[16]. Net absorption in the market has been positive since 2001. New construction has added 799,840 square feet of industrial space in 2006, and 300,600 square feet in 2007. Industrial vacancies have declined steadily since 2004 and are currently estimated at 5.8 percent of supply. Rents have been trending downward.

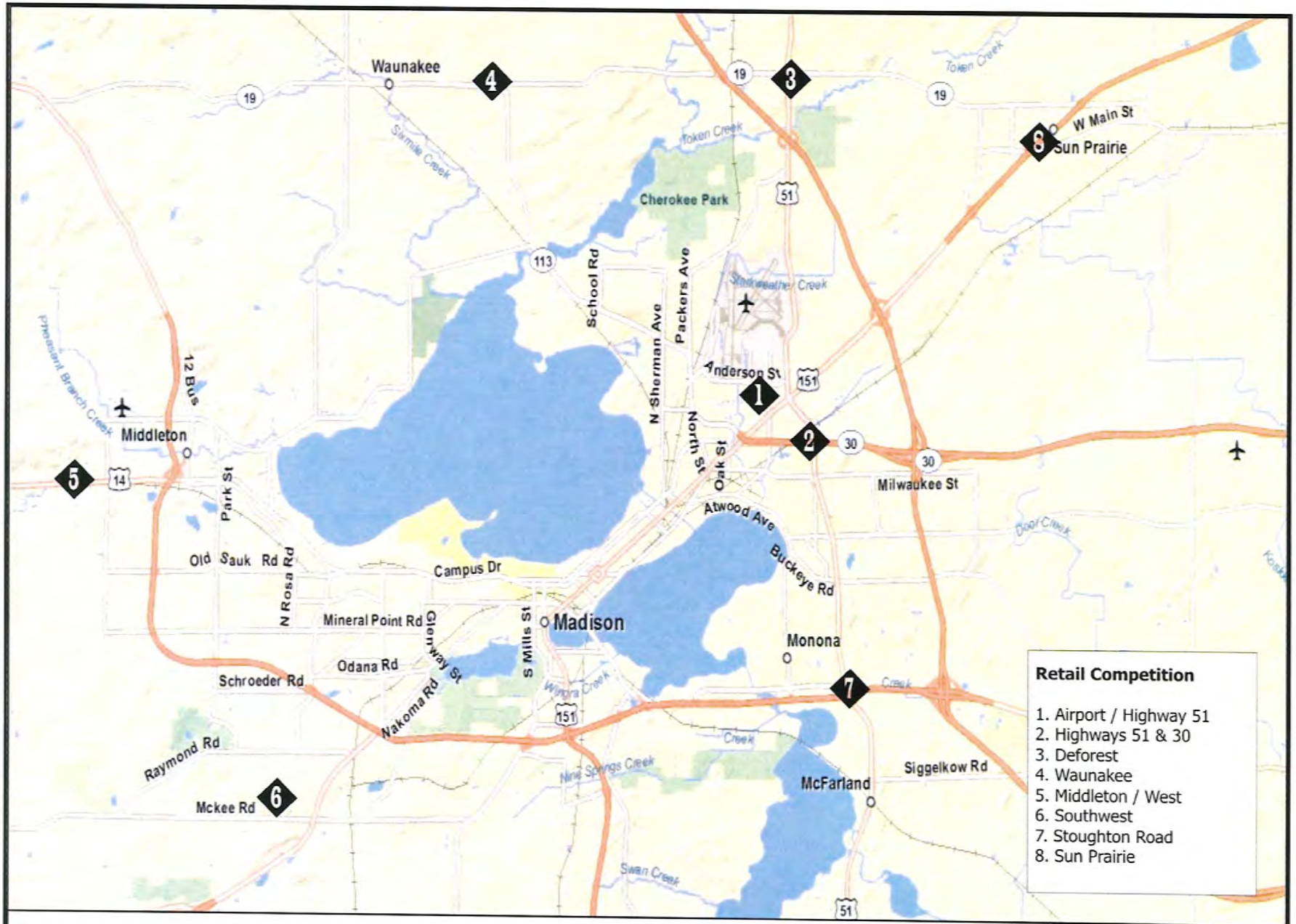
These statistics run counter to trends in the broader region. The Chicago and Southeastern Wisconsin market has seen both a rise in industrial vacancies (9.1 percent in the first quarter of 2008) and net absorption was negative in 2007[17]. Vacancies stood at 10.31 percent in the Milwaukee market and 8.38 percent in Waukesha and the western suburbs[18]. Vacancy rates have been generally increasing in these markets, while new construction, and especially speculative building, has been slowing. As in Madison, lease rates have generally been decreasing over the past two years.

The statistics for Madison's industrial real estate market suggest that area developers are well tuned to current economic conditions and the demand for industrial space. Grubb & Ellis | Oakbrook Research indicates that there has been relatively little speculative construction in the market in 2006 and 2007, and has identified only 30,000 square feet of speculative construction planned in 2008.

Competitive Analysis

Madison's Northside competes with several other parts of the metropolitan area for new industrial development as well as for attracting businesses to existing vacant space. Business parks in Waunakee, Sun Prairie, and Deforest, industrial areas around Highway 30 and Stoughton Road in Madison, and around Highway 14 in Middleton present the most direct competition. These locations target a similar tenant, while business parks on Madison's west side, along the Beltline, or the American Center tend to cater to a tenant seeking higher-quality space.

[16] Industrial Market Trends, Grubb & Ellis / Oakbrook
[17] Chicago Real Estate Daily, April 14, 2008
[18] Small Business Times, December 14, 2007



Map 7 - Industrial Concentrations in the Madison Area

R.A. Smith National, Inc.

The primary advantages of a Northside location include proximity to the airport and to downtown Madison, and access to public transportation services. Having a large workforce nearby may become an advantage over locations in outlying communities if the cost of commuting continues to rise dramatically, as it has since 2005.

Highway access at other locations tends to be equally good or even better, with some competitive sites offering visibility or more direct access to the Interstate highway system. Locations outside of Madison tend to have been developed more recently, resulting in an existing building inventory that is better matched to current standards for manufacturing and warehousing. These outlying locations may also have land available in planned industrial developments

In general, the Northside does not offer a cost advantage over its competition. The exception is that this area appears to offer more affordable buildings for purchase. This may in part be due to the condition or characteristics of the buildings, however, and that may influence their desirability for some users.

Considerations

The following observations reflect R.A. Smith National's opinion of likely opportunities for industrial development on the Northside of Madison, along with considerations for potential actions to encourage development.

- The national and regional industrial real estate market has not experienced the same recent troubles as seen by residential and retail markets. Current trends are mixed, with some areas still performing well. Madison's market has performed well in recent years, and current supply appears to be in balance with demand.
- Build to suit has dominated recent construction in the metropolitan area, with little speculative industrial development. Speculative properties that have been developed in recent years have tended to be targeted to Madison's growing technology sector. With some exceptions, technology businesses have not found the Northside to be particularly attractive.
- Small manufacturing and distribution businesses have been attracted to the airport business parks and other land surrounding the airport. A clustering of businesses directly related to the airport operations has formed around Darwin Road and Highway CV. Otherwise, there does not appear to be any niche markets for industrial uses on the Northside. Uses in the area tend to be seeking less expensive space and do not have a need (or desire) for visibility.
- Renovation or redevelopment may be encouraged south of Commercial Avenue.
- Construction and related businesses can be attracted to the Northside. The area has already attracted a large number of contractors, trades, and related businesses. This part of the City has appropriately zoned land, available buildings, and affordable pricing. New construction (such as the Tradesman Center industrial condominiums on Highway CV) reflects the potential for this market. Locations along Highway CV north of International Drive are better suited to this use.
- Increasing commuting costs may make locations close to a large work force more attractive than sites in outlying communities. The Northside's industrial districts are accessible to a large work force and are served by public transportation. These are advantages that can be strengthened, particularly by improving public transit services. A direct connection from the Northside residential areas to industrial areas east of Highway CV would benefit both neighborhood residents and businesses.
- The Northside competes with planned industrial developments (industrial parks) in outlying communities. a master-planned industrial park on the Northside could be very competitive if it were priced similarly, was served by good public transit, and effectively marketed.

IMPLEMENTATION

The intent of this analysis is to suggest appropriate uses that can be supported by the market, and community development strategies that may enhance opportunities for development on the Northside.

Some of the specific actions the City of Madison may consider to improve prospects for the north side include:

- Identify locations for market-supported land uses on infill, redevelopment, and greenfield sites.
  - Plan a "Main Street" mixed-use district on North Sherman Avenue, between Northgate Shopping Center and Shabazz High School. This area has the greatest potential to attract unique specialty retail to the Northside.
  - Add new residential units through redevelopment including multi-unit residential and mixed use buildings, and senior housing. These redevelopment sites may be found in the southern portions of the area, along North Sherman Avenue, and at the Northside Town Center.
  - Continue to develop higher-end housing targeted to empty-nesters in the northern parts of the planning area.
  - Plan for convenience commercial uses on Highway CV at the future entrance to Dane County Regional Airport.
- Improve the transportation network to support adjacent land uses and accommodate bicycles and pedestrians.
  - Redesign Northport Drive and Packers Avenue to better serve and relate to adjacent commercial and residential land uses. This should include improving site visibility and access.
  - Consider opportunities to improve the visibility of Northside Town Center in any future reconstruction or streetscaping of Northport Drive or North Sherman Avenue.
  - Improve bicycle and pedestrian facilities on the neighborhood's arterial streets.
  - Establish bicycle and pedestrian access between the airport industrial parks and the Northside neighborhoods.
  - Provide direct transit services between the Northside neighborhoods and nearby concentrations of businesses (ex. the airport business parks).

The Dane County Regional Airport has an attractive, prairie-themed streetscape that can be extended into the surrounding business parks to help establish a greater sense of place.

- Raise public awareness of the Northside by creating a recognizable identity for the area.
  - "Brand" the airport business parks by extending landscaping and design elements used on the airport grounds into the business parks.
  - Enhance the frontage of Warner Park to improve its image from the street edge. Future designs for the park may place more active uses directly across from the Northside Town Center to promote cross traffic between these anchor uses.
  - Provide gateway features at major entrances to the Northside.
  - Implement a wayfinding program for the Northside, extending south to East Washington Avenue.
- Improve neighborhood aesthetics.
  - Add streetscaping along arterial streets in the neighborhood, particularly to counter the "rust-belt image" along the industrial properties on Pennsylvania Avenue and Packers Avenue.
  - Target façade, signage, and landscaping incentive programs to the neighborhood's commercial areas.
- Address real and perceived issues of crime and personal safety in the neighborhood.

- Accommodate the needs of existing and future commercial development
  - Plan for mostly small (1,000 to 5,000 square foot) retail and service businesses with a market rent to $12 per square foot.
  - Address the mismatch between large available spaces and small space needs of businesses most likely to be attracted to the Northside. As an example, the Kohl's space my be subdivided to create shallower frontage with office uses at the back of the space, with parking in the rear.
  - Consider economic development programs targeted to helping small retail and service businesses. These will often be independent businesses in a start-up phase, and may include ethnic businesses.
  - Promote the proposed "Main Street" commercial node on North Sherman Avenue.
- Stabilize the Northside housing market and capitalize on demographic changes that can transform the neighborhood.
  - Address immediate concerns about the potential for high rates of foreclosure on the Northside and in adjacent neighborhoods. This area may be targeted for newly available Housing Relief Act funding through the State of Wisconsin.
  - Target home improvement funds that allow aging residents to modify their homes to meet their current needs, or allow younger buyers to make improvements that update homes to meet their housing preferences.
  - Consider alternative approaches to allowing accessory dwelling units, either detached or within the primary structure. These can provide affordable hosing or meet the needs of caregivers or extended families.
  - Assess the validity of perceptions that the area's low-income housing is a source of criminal activity, and work with property owners and law enforcement to address issues that are identified.
  - Identify appropriate sites for new housing targeted to seniors, housing in mixed-use areas with an urban character (such as the proposed North Sherman Avenue "Main Street"), and continued greenfield development to the north.
  - Be prepared to work jointly with the State of Wisconsin to plan and facilitate a cohesive neighborhood development in the event that the Mendota Mental Health Institute or Wisconsin Center is eventually closed, and the property is made available for development.
- Improve conditions for existing and future office uses on the Northside.
  - Improve bicycle, pedestrian, and transit connections between areas of office concentration and adjacent neighborhoods.
  - Promptly address business concerns about criminal activity on their property.
  - Create a sense of identity in the airport business parks through streetscaping and other enhancements.
- Capture opportunities for industrial development.
  - Target programs to retain and expand industrial businesses already on the Northside, and to help rehabilitate existing industrial space.
  - Identify a location for a new industrial park adjacent to the airport and offering rail access, most likely on Highway CV.
  - Support continued growth of a construction and related business niche on the Northside.
  - Improve transit services to existing and emerging industrial business concentrations on the Northside to make them more competitive with outlying competition, where transit options are not available.

APPENDIX A – COMMUNITY INSIGHT

Staff from R.A. Smith National, Inc. conducted several one-on-one interviews and small focus group meetings with residents, property owners, developers, business representatives, and other neighborhood stakeholders. The intent of these meetings was to gather insight into general conditions, intentions, and preferences of workers, residents, and other potential business patrons or future residents of the area. The diverse participants were remarkably consistent in their observations, which are characterized here by topic.

It should be noted that these are the comments or perceptions offered by the persons interviewed. They do not necessarily reflect the observations or assumptions of the project team from R.A. Smith National, or the City of Madison, that have been used to prepare this analysis.

General Perceptions

- There is a feeling that the neighborhood is stagnant and there is simply not much change.
- The neighborhood lacks any center that would help to make it a community. The neighborhood lacks anything unique, although it has Warner Park, the airport, and the Mallards. It is in need of a destination use. Right now the focal point is a tired shopping center.
- Madison has done too good a job of attracting needy people to the community, and many have ended up on the north side. Efforts to clean up the south side have forced problem people from that part of the city to move to the north side. Immigrants are making a positive contribution to the neighborhood.
- Most parts of the neighborhood and the surrounding area were not designed to accommodate pedestrians. It is difficult to walk or ride a bike, particularly on busy streets such as Sherman Avenue. Crossing busy streets such as Northport Drive can be hazardous.
- Traffic congestion, speed, and traffic control are issues of concern. There are concerns about more traffic if the area improves and attracts new businesses and residents. The intersection at Warner Park needs to be improved. Some residents like the stop signs on Sherman Avenue (which have replaced the stop lights during construction) as they do a better job of slowing traffic.
- Access to transportation is a problem for many residents. Bus service is not very efficient for travel from the neighborhood to work near the airport. Hours of service are a problem, with routes needed during the early morning and into the evening hours.
- The bus transfer facility is isolated from any activity and can be a scary place, particularly in the evenings. There is a need to provide facilities at the bus transfer station.
- Problems of crime are a recent phenomenon. Police response has often been slow or non-existent.
- The neighborhood is geographically isolated. (This view was disputed by some.) Much of Madison does not know there is a north side, or what they might find there. Many people have no knowledge of how to get to the north side. Directional signs are needed (wayfinding).
- The neighborhood is not perceived as attractive, and many people only know it by the major streets. It has a working class and grungy feel. Some people do not seem to mind the current aesthetic.
- The gateway to the neighborhood is a concentration of unattractive low-income housing. The neighborhood has decayed due to too high of a concentration of low income housing.
- There has been some neglect by government, particularly in the town islands. Redevelopment is desired, although there are concerns about the effect of gentrification.
- The north side is an "undiscovered place" in Madison, with a "small town" feel that is enjoyed by residents.
- There are a large number of long-time residents in the area. The demographics are changing as blue collar workers age and move on.

Shopping Patterns

- People from Maple Bluff, Waunakee, or even the northern parts of the trade area often prefer to shop on Madison's west side. There may be a mismatch of businesses and potential customers, with high-end customers but discount businesses.
- The neighborhood lacks destination shopping and dining. Nicer draws are not located in the neighborhood or moved out. Any unique businesses are on Sherman Avenue near Maple Bluff.
- The neighborhood lacks a "main street" and could benefit from a development similar to Greenway Station.

- Negative perceptions of the neighborhood keep commuters from stopping (for example, residents of Waunakee). People come into the neighborhood only for brief visits.
- Graffiti, vagrants, vandalism, theft, and other crime is keeping people from shopping in the neighborhood. Issues of crime and safety deter nearby residents from shopping, particularly at Northside Town Center, or at least from shopping during the evening hours.
- The neighborhood does not draw well from outside of the immediate area. Deforest and Windsor residents do not come into the neighborhood to shop. After north side residents, Deforest residents are the most likely to come into the area.
- Most workers in the airport office and industrial parks are going to East Washington to eat or shop. There is some future potential to capture nearby workers for retailers and services in the neighborhood. There are no restaurants, services, or retailers that are within walking distance for workers in the airport office park.
- People from the area tend to shop at Copp's more than other grocers, with trips to Pierce's in-between. Pierce's may be too upscale for the market. It is seen as a smaller store with less variety and higher prices. People like Woodman's and Aldi. The Asian and Hispanic groceries are seen as good additions to the neighborhood.
- Northside Town Center is benefitted by being on a bus route and people can get there by walking. The library is a draw.
- Northgate is successful because it offers low rent and large spaces.
- There is nothing on Packers Avenue that would make anybody want to stop.
- Many of the traditional customers at area businesses are aging. These residents are loyal to long-time businesses like Dorn's Ace Hardware.
- Restaurant business was characterized by many as steady. There has been a lot of turnover with some restaurants (Hardee's, Popeye's, Chinese Palace, etc.) and perhaps some sites are not very good.
- There is a need to re-brand the neighborhood, encourage people to shop locally, and promote area businesses.
- The concentration of lower-income households is a challenge for the neighborhood's retailers and service businesses. The demographics of the north side are similar to Madison's east side and Cottage Grove, which have done a better job of capturing retail.
- There are too many used car lots in the area.
- Shopko appears to be in trouble and the City of Madison should work with the store to address any issues before it is too late.
- Convenience businesses will do well in the neighborhood.
- There is a general lack of reinvestment by area businesses, many of which are long-term "ma and pa" operations and lack fresh ideas.

Business Activity and Development

- The office market in Madison has been overbuilt since the early 2000's. Lease rates for Class A office space have come down. Low rent per square foot ($15 gross) has been one of the advantages of the airport business parks, but that advantage is eroding. The ability to provide a 5,000 to 10,000 square foot space is an advantage, as many competing properties want larger tenants.
- Lease space in the airport business park is good for small businesses with fluctuating needs. The airport entry and landscaping improvements are nice. There is a need to brand airport business park. The land lease requirement in the airport business park is not favorable and encourages a lower-quality development.
- Because values are lower and because of the zoning available, many small businesses can find a place to buy in the neighborhood.
- The proximity of the airport is a benefit to some companies but there are no immediate attractions other than the airport. There is a need for services for the workers in close proximity. MATC provides no benefit to many of the airport business park tenants.
- The neighborhood and the airport industrial park offer good highway access. Pankratz Street should be extended to Shopko Drive. Bus service is not convenient. Access to downtown is poor.
- Many of the workers in the airport business park and surrounding areas live on the east side.
- Commercial vacancies have been in a range from three to five percent, and higher at the malls. The age and condition of much of the building inventory in the area is a problem for business attraction. While rents are favorable, the space is run-down.

- Prevailing rents in the area will make it difficult to support redevelopment. City participation will be needed to initiate projects. Development could be encouraged by providing a minimum guaranteed density that the developer may rely on when planning a project. Development regulations need to support what the market can deliver. Madison needs to reconcile high standards with reasonable costs.
- There are a large number of home-based businesses in the area. Many businesses start up from within the neighborhood. There appears to be demand for entrepreneurial space.
- Non-profit organizations (such as social services) are possible tenants.
- The concentration of low-income housing is a deterrent to businesses moving to the area. At the other end of the spectrum, there is a lack of high-end housing for executives.
- Crime has been a problem for several businesses in the neighborhood or on the western fringe of the airport office park, with several burglaries or damaged vehicles.

Housing

- The north side is a "forgotten area" for housing in Madison. Much of the neighborhood was built for Oscar Mayer workers, but wages at Oscar Mayer have gone down.
- Low home values are attracting many first-time buyers. Advantages include a location on the edge of town, comparatively larger lot sizes, and proximity to the lake.
- Values on the north side have increased at an average rate or slightly low, but are now flat. Some parts of the north side (Assessment Areas 50 and 73) have seen good recent value increases. Prices are generally in a $160,000 to $180,000 range.
- Because of their low prices and slow sales, many of the neighborhood's homes are being converted to rentals.
- The north side is seen by many as the next step in the east side's revitalization. North Spaight is a similar area undergoing renewal, but it is affordable and not scary.
- The quality of neighborhood schools is becoming a concern. The schools need to be better integrated into the neighborhood. The school district needs to provide more stability by establishing firm school boundaries and not threatening to close schools. Magnet schools may be a solution.
- Madison East High School is becoming more trade-oriented instead of college prep, and this will cause many buyers to reject the neighborhood.
- Residents of the existing north side are the ones who are moving into new housing on the north side. Older residents are also moving to downtown Madison. There will be a need for more senior housing in the area.
- Cherokee associates more closely with Waunakee than with the north side of Madison.

APPENDIX B – NORTHSIDE BUSINESSES

The following businesses were identified by ESRI Business Analyst as having a location within the Northside study area. Information provided for these businesses includes its industry class (SIC and NAICS). These businesses are grouped by the sub-area in which they are located.

Airport Sub-Area

Company	SIC	NAICS
FRIEDE & ASSOC	152103	23611505
TRIEWEILER CONSTRUCTION	152103	23611505
HEARTRIDGE HOMES INC	152112	23611506
GUGGER WINDOW & SIDING	152105	23611816
AMERICAN STRUCTURES GENERAL	154210	23622008
HIGHWAY DEPT MATERIAL LAB	161102	23731012
J P CULLEN & SONS	874104	23799012
WICKCRAFT PIER & TRACK CO	162902	23799021
JMA ROOFING & CONSTRUCTION	176109	23816014
DMW PROPERTIES	734911	23899052
BADGERLAND MEAT & PROVISIONS	201101	31161102
OMNIPRESS	275202	32311009
SIGN PRO	275202	32311009
GAR PLASTICS INC	282101	32521105
BELL LABORATORIES INC	287998	32532009
ZEIER PLASTIC & MFG INC	308901	32619910
LAIRD PLASTICS	308902	32619913
B & P OFFICE SUPPLY	356907	33399901
COVANCE LABORATORIES INC	384104	33911203
FACTORY MOTOR PARTS	501313	42312015
HENRICKSEN	502112	42321003
COUNTY MATERIALS CORP	503206	42332015
SPEEDWAY SAND & GRAVEL	503211	42332036
VIRENT ENERGY SYSTEMS	503306	42333001
MARVEL MEDTECH	504704	42345028
REYNOLDS X-RAY CO	504720	42345037
MENASHA CORP	511318	42413006
ECONOMY PRODUCE CO OF MADISON	514801	42448009
ANCORA COFFEE ROASTERS	514905	42449015
SIMTEC SILICONE PARTS	516935	42469068
BENZ OIL	517211	42472009
MIDWEST INGREDIENTS	514102	42512050
L & S FOODS LLC	514939	42512058
LANDS END AVIATION	559905	44122905
CUTCO CUTLERY	571918	44229923
SOUTHERN WISCONSIN FOODS	541104	44511002
PDQ FOOD STORES	554101	44719005
SURPLUS WITH A PURPOSE	561102	44815048
EXECUTIVE DELIVERY	594808	44832003
BINGO PROGRAM PUBLISHERS	594522	45112004
ZINO PRESS CHILDREN'S BOOKS	594201	45121105
MADISON TEXTBOOK CO	594201	45121105
JACKSON OFFICE SUPPLIES	594301	45321007
OFFICE DEPOT	594301	45321007
PARADIES SHOPS	594712	45322013
MADISON COFFEE & VENDING INC	596307	45439002
UNITED AIR LINES INC	451201	48111102
MIDWEST EXPRESS AIRLINES INC	451201	48111102
CONSOLIDATED AIR EXPRESS	421205	48411004

TATES'S NATIONAL TRANSPORT LLC	421304	48423013
HARNESS YOUR FREIGHT LLC	421303	48423020
LAND'S END HANGER	458105	48811903
HANGAR LLC	458105	48811903
FEDERAL AVIATION ADMINISTRATIO	458111	48811906
NORTH CENTRAL AVIATION SER	458111	48811906
DANE COUNTY REGL AIRPORT-MSN	458106	48811907
TAG AVIATION USA INC	458104	48819004
PEGASUS FREIGHT SYSTEMS LLC	473101	48851011
INSIDE WISCONSIN SPORTS	272102	51112006
CLASSIC CHARM PUBLISHING	274105	51119908
MATC'S MITBY THEATER	783201	51213101
MITBY THEATER	783201	51213101
ACCESS WISCONSIN	481304	51711006
APPLEWOOD HOMES	738959	51919018
MATC CREDIT UNION	606101	52213003
TRUAX CREDIT UNION	606101	52213003
PLATINUM CONCEPTS INC	616201	52229202
PLATINUM CONCEPTS	616201	52229202
GREAT LAKES FINANCIAL	616201	52229202
MORTGAGE STORE	616201	52229202
AMERICAN HOME LOANS	616201	52229202
PYLE GROUP	628202	52392001
SUREBOND INC	628203	52393002
AIRPARK FINANCIAL SVC	628205	52393005
IMI FINANCIAL CONSULTANTS	628205	52393005
JFB FINANCIAL SVC	628205	52393005
O'CONNELL FINANCIAL SVC LLC	628205	52393005
WOODRIDGE VENTURE GROUP	628204	52393007
AFLAC	641112	52421001
WISCONSIN INSURANCE SECURITY	641112	52421001
FARMERS INSURANCE GROUP	641112	52421001
GALLAGHER BASSETT SVC INC	641112	52421001
AID ASSOCIATION FOR LUTHERANS	641112	52421001
CUSTARD INSURANCE ADJUSTERS	641102	52429103
MAXIMUM ADVANTAGE PENSION PLAN	637102	52511004
EXECUTIVE EAST APARTMRNTS	651303	53111002
ASSIST-2-SELL	653118	53121003
KINSMAN INVESTORS	653118	53121003
EXECUTIVE MANAGEMENT INC	653108	53121005
CLEARWATER APPRAISAL & CNSLTNG	653116	53132003
AVIS RENT A CAR	751401	53211101
HERTZ RENT A CAR	751401	53211101
ALAMO RENT-A-CAR	751401	53211101
BUDGET RENT A CAR	751401	53211101
THRIFTY CAR RENTAL	751401	53211101
PENSKE TRUCK LEASING	751303	53212016
GROSSO AVIATION LLC	735939	53241101
NATIONAL WEATHER SVC	899931	54100000
LAW ADVISORS	811103	54111002
RSM MC GLADREY INC	872101	54121101
BECKETT TAX & ACCOUNTING LLC	729101	54121301
AYERS ASSOCIATES	871110	54133014
FOTH & VAN DYKE ENGINEERS	871110	54133014
MSA PROFESSIONAL SVC INC	871111	54133016
SILLIKER LABORATORIES OF WI	873402	54138023
CREATIVE BUSINESS INTERIORS	738902	54141003
ACUMIUM	737103	54151105
GLYTHOR INC	737103	54151105

TOTAL ADMINISTRATIVE SVC	874216	54161201
NEXANT INC	874212	54161203
NEW FOCUS CONSULTING GROUP	874201	54161401
SOLARIS MANAGEMENT LLC	874201	54161401
BRIM HEALTHCARE INC	874835	54161823
COVANCE LABORATORIES INC	873101	54171101
LOGENETICS	873104	54171126
BELL LABORATORIES INC	873104	54171126
BELL LABORATORIES INC	873104	54171126
J F NEW	873111	54171131
SIFTY SIVE PLUS ADVERTISING	731101	54181001
S R BIDINGER YELLOW PAGES INC	731103	54181003
MADISON AUTO GUIDE	731108	54181006
DOAK CARRIER O'DONNELL & ASSOC	874304	54182003
ZIP-SORT INC	733105	54186002
BOLDT CO	731907	54187004
UNIV OF WISCONSIN-DISTRIBUTION	731908	54187005
WISCONSIN RECEIPT ADVERTISING	731919	54189006
PRINT TECH PROMOTIONAL GROUP	519917	54189008
DUNLOP ASSOCIATES	519917	54189008
MADISON VETERINARY CLINIC LTD	74201	54194009
VISUALLY IMPAIRED-BLIND SVC	899999	54199009
SIMPLIFIED STAFFING INC	736103	56131102
ADMINISTRATIVE & TECHNICAL SVC	736103	56131102
PLACEMENT OPPORTUNITIES	736103	56131102
UMOS INC	736106	56131103
FORWARD SERVICE CORP	736304	56132001
ITS	738102	56161208
TIDY TEAM CLEANING SVC	734902	56172001
T C CARPET CARE	721704	56174001
MADISON AREA TECHNICAL COLLEGE	821103	61111007
LAKELAND COLLEGE	822101	61131009
WISCONSIN AVIATION INC	829917	61151201
MADISON AREA TECHNICAL COLLEGE	824903	61151916
FAST NATIONAL	829929	61171003
CONCENTRA MEDICAL CTR	801101	62111107
LORA WIGGINS MD	801101	62111107
IMPLANT DENTISTRY OF MADISON	802101	62121003
FREEDOM SPEAKERS & TRAINERS	804974	62134013
MICHAEL J DODDS	804907	62139923
MADISON ABORTION CLINIC	809304	62141001
PLANNED PARENTHOOD CRHC EDU	801104	62149301
BARBARA GUTHRIE MEDICAL SVC	801104	62149301
CREATIVE COMMUNITY LIVING SVC	806301	62221001
ELDERSPAN MANAGEMENT LLC	836105	62331206
ADOPTION ADVOCATES INC	832207	62411001
HEALTH & FAMILY SVC	832253	62411003
ELDER CARE OF WISCONSIN	832210	62412002
ELDER CARE OF WISCONSIN	832210	62412002
EYEBANK OF WISCONSIN	832218	62419012
EAST MADISON COMMUNITY CTR	832218	62419012
DANE COUNTY PARENT COUNCIL INC	835101	62441003
BARR PRODUCTIONS MUSEUM	841201	71211001
CREATIVE CROISSANTS	581208	72211019
ALE ASYLUM	581208	72211019
JET ROOM PAT O'MALLEY'S	581208	72211019
MC DONALD'S	581208	72211019
BEN & JERRY'S	581203	72221313
SPORTS PUB	581301	72241001

EAGLES CLUB	581301	72241001
RODELL AUTO	753201	81112102
CLASSIC CLEANERS	721201	81232002
GREAT LAKES EDUCATIONAL LOAN	839998	81331908
COMMUNITY ACTION COALITION	839998	81331908
WISCONSIN FERTILIZER ASSN	839998	81331908
CITIZEN ADVOCACY	869903	81341018
WISCONSIN CONCRETE PAVEMENT	861102	81391002
NATIONAL ASSOCIATION-INSURANCE	861102	81391002
NATIONAL AIR TRAFFIC CNTRLLRS	863101	81393001
MADISON HOUSING OPERATIONS	912104	92112006
JOINING FORCES FOR FAMILIES	912103	92112007
QUALITY ASSURANCE	912102	92112008
BADGER STATE INDUSTRIES	912102	92112008
AIR SERVICES DEPT	912102	92112008
LABORATORY CERTIFICATION	912102	92112008
BLIND BUREAU	912102	92112008
DEAF & HARD OF HEARING BUREAU	912102	92112008
US DAIRY DIV USDA	912101	92112009
DANE COUNTY	919903	92119002
FIRE DEPARTMENT TRAINING DIV	922404	92216003
EMERGENCY MANAGEMENT	922902	92219006
EMERGENCY GOVERNMENT DIV	922902	92219006
AGING & LONG TERM CARE BOARD	944102	92313004
BLIND VISUALLY IMPAIRED SVC	944102	92313004
VOCATIONAL REHABILITATION DIV	944102	92313004
US AIR TRAFFIC CONTROL	962101	92612001
US FAA	962101	92612001
TRANSPORTATION DISTRICT DIV	962102	92612002
ARMY AVIATION FLIGHT ACTIVITY	962102	92612002
TRANSPORTATION DEPT	962102	92612002
US AIR FORCE BASE EXCHANGE SVC	971101	92811003
US ARMY RESERVE CTR	971101	92811003
NATIONAL GUARD	971102	92811007
ARMY NATIONAL GUARD	971102	92811007
MILITARY AFFAIRS	971102	92811007
AIR NATIONAL GUARD	971102	92811007
ADJUTANT GENERAL	971102	92811007
AIR NATIONAL GUARD RECRUITING	971102	92811007
AIR NATIONAL GUARD	971102	92811007
ARMY NATIONAL GUARD	971102	92811007
ARMY NATIONAL GUARD	971102	92811007
BORDER PATROL	972101	92812003
ALFALIGHT INC	999977	99999001
OPTIMATOR INC	999977	99999001
MPI	999977	99999001
BRAT UND BRAU	999977	99999001
SOUTH CENTRAL WISCONSIN PRVT	999977	99999001
TEC CTR INC	999977	99999001
MOBILE MONEY	999977	99999001
QUIZZER LTD	999977	99999001
KRB PERFORMANCE INC	999977	99999001
ARTVILLE	999977	99999001
ARROWHEAD GLOBAL SOLUTIONS INC	999977	99999001
MENLO PARK LTD	999977	99999001
VERO TECHNICAL SUPPORT INC	999977	99999001
ALLEGIANT AIR	999977	99999001
COMPASS GROUP USA INC	999977	99999001
M & I	999977	99999001

Highway CV Sub-Area

Company	SIC	NAICS
DAN'S TAXIDERMY	769904	11521017
VOGEL PROPERTIES INC	655202	23721005
RUEDEBUSCH COMMERCIAL INVSTMTS	655202	23721005
BADGER ASPHALT	161101	23731010
RIDGETOP ROOFING WINDOWS	176109	23816014
LAKE CITY REMODELING	176109	23816014
INDOOR COMFORT CONTROL	171102	23822020
4 LAKES PLUMBING INC	171105	23822025
NWRCC TRAINING CTR	175102	23835003
LOST FINISH	175104	23835012
J N WOODWORKS INC	175106	23835013
FOUR LAKES PAVING CO INC	177118	23899009
ALPHA BAKING CO	546102	31181102
TOOL MAKERS	359903	33271002
IDEAL MANUFACTURING & SALES	355909	33331949
TOPWRIGHTS	571213	33711004
CARLEY WOOD ASSOC	571217	33712205
DYNOTUNED PERFORMANCE	501335	42312046
WISCONSIN COPY & BUSINESS EQPT	504403	42342015
ALTERNATIVE COPIER	504403	42342015
WOOD & SON CONSTRUCTION	504607	42344035
RESOURCE SOLUTIONS CORP	509313	42393019
SEED SOLUTIONS	519105	42491027
CUSTOM INNOVATIONS	551101	44112001
DUTCH MILL AUTOWORKS & MARINE	551103	44112005
DAN'S CAR DEALS	551103	44112005
CAMPERLAND RV	556103	44121005
CENTERLINE TIRE SVC	553123	44132001
RUGRATS FLOORING INC	571305	44221001
PROSOURCE ONE	526139	44422005
PACKER LIQUOR STORE	592102	44531004
U W HEALTH PHARMACY	591205	44611009
STOP N GO	554101	44719005
TNT EXPRESS	421205	48411004
L & L MOVING INC	421401	48411009
SUTTON TRANSPORT INC	421309	48423017
MIDWEST WAREHOUSE	422505	49311008
ASSOCIATED BANK	602101	52211002
PACKERS TOWNHOUSES	651303	53111002
DRYDEN TERRACE APARTMENTS	651303	53111002
LONDONDERRY APARTMENTS	651303	53111002
IDEAL STORAGE	422503	53113001
OAK PARK TERRACE	651501	53119004
REALTY TREE	653118	53121003
BUDGET RENT A CAR	751401	53211101
U-HAUL CO	751303	53212016
LUNDA CONSTRUCTION	871208	54131012
FANT CONSULTING & SOLUTIONS	737904	54151905
W-L RESEARCH INC	873101	54171101
TREK TRAVEL BICYCLE TOUR OPRTR	472402	56151007
GREYHOUND JANITORIAL SVC LLC	734902	56172001
A-Z WHOLESALE	738995	56199017
DUMPSTER SERVICE DIV RESOURCE	495302	56211901
FIELD'S SELF-DEFENSE SPECLST	799945	61162014
NORTHEAST FAMILY MEDICAL CTR	801101	62111107
MICHAEL H MC DONALD MD	801101	62111107

CHIROPRACTIC WORKS	804101	62131002
RIVER FOOD PANTRY	832218	62419012
ATTIC CORRECTIONAL SVC INC	832218	62419012
DANE COUNTY PARENT COUNCIL INC	835101	62441003
KINDERCARE	835102	62441006
MC DONALD'S	581208	72211019
BLIMPIE SUBS & SALADS	581208	72211019
BAUER'S AUTO SVC	753801	81111104
AL'S AUTOMOTIVE & AUTO BODY	753801	81111104
CAC AUTO REPAIR SVC	753801	81111104
NORTHSIDE SERVICE CTR	753801	81111104
BADGER TRANSMISSION & AUTO RPR	753701	81111302
WOODLAND INDUSTRIES INC	769928	81141105
APPLIANCE REPAIR CTR	762902	81141201
COLONIAL MANAGEMENT NORTH	764112	81142001
CARPENTERS	863101	81393001
MADISON POLICE DEPT NORTH DIST	922104	92212003
CORPORATE EXPRESS	999977	99999001
KERRY AMERICAS	999977	99999001
SUNNY'S LIGHTHOUSE	999977	99999001

Northport Drive Sub-Area

Company	SIC	NAICS
CALDWELL CONSTRUCTION	152103	23611505
RAINBOW'S END RENOVATIONS	152103	23611505
HONEY DO HANDYMAN	152115	23611815
ISTHMUS HANDYMAN SVC	152105	23611816
RUEDEBUSCH CARL & ASSOC	154213	23622005
CHEROKEE BUILDING	154213	23622005
CHEROKEE BUILDING	154213	23622005
DRIVEWAY DOCTOR & MASON	161101	23731010
BRIAN A MITCHELL CONSTRUCTION	179102	23812004
ARMSTRONG BUILDING RESTORATION	174107	23814002
CAPUEX ROOFING	176108	23816011
ACCENT PAINTING	172101	23832003
MAD-CITY PAINTING CO	172101	23832003
APEX PAINTING INC	172101	23832003
ALL STATE CHIMNEY & RSTRTN	734916	23899055
DORN CLEANING SVC	734922	23899072
USA ORGANICS	209903	31199906
FUGENT CO	283601	32541401
QUARRY INTERIORS	571213	33711004
DAN'S CUSTOM CARPENTRY	571217	33712205
TOUR IMAGES	509106	42391020
GRANDPA'S HOT TUB RENTAL SYST	509108	42391026
A 1 AUTO REMOVAL	509313	42393019
MY 2NZ INC	509910	42512027
HANCOCK FABRICS	571406	44229102
MEIKLE'S NORTHSIDE TRUE VALUE	525104	44413005
DOOR TECH GLOBAL	521131	44419017
JUNG GARDEN CTR	526104	44422008
LA QUERETANA	541105	44511003
LA REGIONAL	541105	44511003
PIERCE'S NORTHSIDE MARKET	541105	44511003
COPPS CORP	541105	44511003
ROAD RANGER	541103	44512001
JIM'S MEAT MARKET INC	542107	44521006
BRENNAN'S COUNTRY FARM MARKET	543101	44523003

SPIRITS UNLIMITED LLC	592102	44531004
WALGREENS	591205	44611009
SIMPLY PURE	549901	44619103
PDQ FOOD STORES	554101	44719005
NORTH PORT SHELL	554101	44719005
ALTERED STATES ALTERATIONS	569932	44819001
D & S BAIT TACKLE & ARCHERY	594131	45111019
FAMILY DOLLAR STORE	533101	45299013
G V TRUCKING	421201	48411015
TIZIANI LOGISTICS	473101	48851011
SIGHTS & SOUNDS INC	271101	51111003
LAKEVIEW RESEARCH	273101	51113003
HENWHEY	781211	51211016
AREA 64 STUDIOS	738947	51224002
LAKEVIEW BRANCH LIBRARY	823106	51912006
ANCHOR BANK	602101	52211002
HOME SAVINGS BANK	602101	52211002
GREAT MIDWEST BANK	602101	52211002
ABC MORTGAGE & FINANCIAL SVC	614101	52229103
PLS	614101	52229103
ROCKSTAR FINANCIAL	616201	52229202
GUARDIAN MORTGAGE GROUP	616201	52229202
PLS PAYDAY LOAN STORE	609903	52232003
MADISON'S CASH EXPRESS	609903	52232003
AAA INSURANCE	641112	52421001
STATE FARM INSURANCE	641112	52421001
NORTHPORT APARTMENTS	651303	53111002
WOODLANDS APARTMENTS	651303	53111002
KENNEDY HEIGHTS TOWNHOUSES	651303	53111002
NORTH POINT APARTMENTS	651303	53111002
NORTHRIDGE TERRACE	651303	53111002
NORTHRIDGE APARTMENTS	651303	53111002
TRAFALGAR APARTMENTS	651303	53111002
WOODLANDS APARTMENTS	651303	53111002
LAKE POINTE APARTMENTS	651303	53111002
CHEROKEE PARK INC	651301	53111004
EAST BLUFF HOMEOWNERS ASSN INC	651301	53111004
CHEROKEE GARDEN CONDO ELEVATOR	651301	53111004
CHEROKEE CONDOMINIUM POOL	651301	53111004
CHEROKEE GARDEN CONDO ELEVATOR	651301	53111004
CHEROKEE GARDEN CONDO ELEVATOR	651301	53111004
CHEROKEE GARDEN CONDOS	651301	53111004
CHEROKEE GARDEN CONDO ELEVATOR	651301	53111004
CHEROKEE GARDEN CONDO ELEVATOR	651301	53111004
NORTHSIDE TOWN CTR	651201	53112008
HWY 113 & RIVER RD WAREHOUSING	422503	53113001
LUETKE INVESTMENT REAL ESTATE	653118	53121003
HOVDE & HOVDE INC	653118	53121003
FAIRCREST MANAGEMENT	653118	53121003
MADISON INCUBATOR-TECHNOLOGY	653113	53121006
ASSOCIATED REAL ESTATE APPRSRS	653116	53132003
UNITED SERVICE APPRAISALS LLC	653116	53132003
BOX OFFICE VIDEO	784102	53223006
LEASER COMPUTER	737701	53242003
RAPPAPORTINK	899903	54100000
BRUNS GROUP	811103	54111002
JOSEPH F PRELOZNIK	811103	54111002
KINGDOM LEGAL SVC	811198	54111016
DEPT-NATURAL RESOURCES-STATE	872101	54121101

MEADOW RIDGE HEALTHCLAIMS	872103	54121901
HERCULES CONTRACTORS & ENGR	871111	54133016
P S MUELLER	733604	54143002
AURORA SKY DESIGN	733603	54143006
EMGRAPHICS.NET	733603	54143006
LAUREL PLUM EXQUISITE EMBRDRY	738942	54149001
BIOCOMMUNICATION ELECTRONICS	737902	54151212
GLOBAL ENERGY OPTIONS	874212	54161203
FRANCK & ASSOC	874214	54161302
INTEGRATED PLANNING SYSTEMS	874201	54161401
AFFECTIVE AWARENESS INC	874201	54161401
CARLA CORWITH LEGAL NURSE	874872	54169059
WISCONSIN RADIOLOGICAL LABS	873104	54171126
MY YES CARD CENTRAL	731914	54187001
STUDIO EAST PHOTOGRAPHICS	722101	54192110
CARDEN PHOTOGRAPHY	722101	54192110
WAGNER PHOTOGRAPHY	722101	54192110
DAYDREAM VIDEO	722113	54192116
JAY SALVO PHOTOGRAPHY INC	733501	54192204
JGE HOLDINGS INC	671901	55111201
REMEDY INTELLIGENT STAFFING	736103	56131102
SECRETARIAL SERVICES UNLTD	733816	56149203
EDUCATIONAL TRAVEL CTR	472402	56151007
VACATION MARKETING	472402	56151007
A & K JANITORIAL SVC	734902	56172001
RON ELLENBOLT	78304	56173002
TJUGUM & SONS LAWN & LANDSCAPE	78204	56173009
BUSINESS PARK DEVELOPMENT CO	738999	56199001
CLARK LIGHT HAULING	495302	56211901
RITE-NOW ROOTER	769902	56299102
BLACK HAWK MIDDLE SCHOOL	821103	61111007
MENDOTA ELEMENTARY SCHOOL	821103	61111007
CHARLES LINDBERGH ELEMENTARY	821103	61111007
LAKEVIEW ELEMENTARY SCHOOL	821103	61111007
SAMUEL GOMPERS ELEMENTARY SCHL	821103	61111007
MUSICAL TOTS MUSIC TOGETHER	829918	61161005
ANN M HEASLETT MD	801101	62111107
MENDOTA MENTAL HEALTH INST	801101	62111107
CENTRAL WI CTR-DEVELOPMENTALLY	801101	62111107
MADISON HAIR TRANSPLANT CLINIC	801101	62111107
ORTHODONTIC SPECIALISTS-MADISN	802101	62121003
LAKEVIEW DENTAL	802101	62121003
MC KINNEY DENTAL	802101	62121003
ASSOCIATED PODIATRISTS LLP	804301	62139103
WONG'S ACUPUNCTURE	804913	62139901
PERFECT HEALTH ACUPUNCTURE	804913	62139901
MENDOTA MENTAL HEALTH INST	806202	62211002
LEGACY GARDENS ASSISTED LIVING	836105	62331206
KENNEDY HEIGHTS COMMUNITY CTR	832222	62411006
NORTH-EASTSIDE SENIOR CLTN	832206	62412003
VERA COURT NEIGHBORHOOD CTR	832218	62419012
MADISON CENTER FOR APPLIED	833102	62431009
WISCONSIN CHILD CARE IMPRVMNT	835104	62441002
DANE COUNTY PARENT COUNCIL INC	835101	62441003
COUNTRYSIDE MONTESSORI PRESCHL	835101	62441003
GWEN RILEY'S DAYCARE CTR	835101	62441003
OOLLC	835101	62441003
LAKEVIEW CO-OP PRE-SCHOOL	835102	62441006
CHEROKEE PARK INC	799951	71219004

CHEROKEE COUNTRY CLUB	799706	71391001
JOELLYN ERDMANN GOLF	799201	71391002
CURVES	799101	71394011
WARNER PARK COMMUNITY REC	799701	71394015
MADISON MALLARDS BASEBALL	799708	71399006
ANNIE'S GARDEN BED & BREAKFAST	701107	72119101
PIZZA HUT	581222	72211016
MARINER'S INN	581208	72211019
COFFEE GALLERIE	581208	72211019
CULVER'S	581208	72211019
BENVENUTO'S ITALIAN GRILL	581208	72211019
ROCKY ROCOCO PIZZA & PASTA	581208	72211019
SUBWAY	581208	72211019
J D'S EXPRESS & CATERING	581212	72232001
J J'S TOP OF THE SWAMP	581301	72241001
GRANDFATHER CLOCK REPAIR	763103	81149009
CULLY'S WELD WORKS	769203	81149058
SHERMAN PLAZA HAIRSTYLING	724101	81211101
NORTHPORT BARBER SHOP	724101	81211101
SERENITY SALON & DAY SPA	723106	81211202
PRIME CUT	723106	81211202
ABBEY'S CLIPS 'N SNIPS MOBILE	723106	81211202
CHUNISE HOME HAIR SALON	723106	81211202
DENA FRITZ HAIR SALON	723106	81211202
ADULT CHRISTIAN EDUCATION	866102	81311002
ST PETER CATHOLIC CHURCH	866107	81311008
LAKEVIEW LUTHERAN CHURCH	866107	81311008
NORTHSIDE CHRISTIAN ASSEMBLY	866107	81311008
SHERMAN AVE UNITED METHODIST	866107	81311008
CHURCH OF CHRIST	866107	81311008
JAKES VOKER	866106	81311009
YOUTH WITH A MISSION	866110	81311021
INTERNATIONAL COMMITTEE-PEACE	866110	81311021
JAMES CO	839907	81321901
PROTECT ANIMAL LIFE INC	869901	81331201
HOPE HAVEN REBOS UNITED INC	839902	81331905
ALCOHOLICS ANONYMOUS	839902	81331905
FRIENDS OF TROY GARDENS	839998	81331908
MADISON AREA SAFETY COUNCIL	839998	81331908
CHEROKEE GARDEN CONDOMINIUM	861102	81391002
PLANNING COUNCIL	861102	81391002
WSEU	863101	81393001
LIEUTENANT GOVERNOR	911102	92111004
DANE COUNTY WI WELL WOMAN PRGR	912103	92112007
DANE COUNTY YOUTH COMMISSION	912103	92112007
DANE COUNTY OMBUDSMAN	912103	92112007
DANE COUNTY ADULT COMMUNITY	912103	92112007
DANE COUNTY DENTAL HEALTH	912103	92112007
JOINING FORCES FOR FAMILIES	912103	92112007
CENTRAL WISCONSIN CTR	912102	92112008
REPRESENTATIVE STEVE WIECKERT	912102	92112008
DANE COUNTY PUBLIC HEALTH DEPT	943103	92312002
HUMAN SERVICES-DANE COUNTY	944103	92313002
DANE COUNTY HUMAN SVC DEPT	944103	92313002
ENVIRONMENTAL HEALTH	951103	92411002
CODLLC	999977	99999001
MAXWELL SMART LTD	999977	99999001
KAJSIAB HOUSE	999977	99999001
COMMUNITY LIVING CONNECTIONS	999977	99999001

NE MOULD	999977	99999001

Sherman Avenue Sub-Area

Company	SIC	NAICS
HARRY D CLARKE FARM	19101	11199803
ALWAYS THERE' PET CARE	75211	11521013
WHOLLY CATS	75211	11521013
PAMPERED PETS	75211	11521013
DOG GONE CITY KITTY	75211	11521013
NORTH WIND PET CARE EAST SIDE	75211	11521013
WHITETAIL COUNTRY TAXIDERMY	769904	11521017
NATURE'S IMAGE	769904	11521017
CAPITAL CITY CONSTRUCTION LLC	152103	23611505
BORCHARDT BUILDERS	152103	23611505
BARLOW BUILDERS INC	152103	23611505
RPG BUILDERS	152112	23611506
WOOD CONSTRUCTION OF WISCONSIN	152112	23611506
UNIVERSAL PROPERTIES	152112	23611506
VERIDIAN HOMES	152112	23611506
SERVPRO	152114	23611813
APEX HOME IMPROVEMENTS	152105	23611816
T Z OF MADISON INC	152105	23611816
TOP SHELF BUILDERS LLC	152105	23611816
WOOD TICK	152105	23611816
LANE'S QUALITY CONSTRUCTION	152105	23611816
RURAL CONTRACTING	152105	23611816
SMITH CONSTRUCTION LLC	152105	23611816
B T REMODELING	152105	23611816
PYRAMID CONSTRUCTION	152105	23611816
IMAGE CONSTRUCTION LLC	152105	23611816
DOUGLAS REMODELING	152105	23611816
MILLENNIUM DECKS	152101	23611821
D & P REMODELING LLC	152139	23611823
T & D BUILDER'S BETTER LIVING	152122	23611830
LARSON BUILDERS LLC	154213	23622005
M & J HOME LLC	154213	23622005
BNB MAINTENANCE LLC	154227	23622047
BARA ENTERPRISES	655202	23721005
WINDSOR DEVELOPMENT CORP	655202	23721005
DOVETAIL DEVELOPMENT INC	655202	23721005
JOHN DE WITT REAL ESTATE DEV	655202	23721005
PARKING SOLUTIONS	161101	23731010
EXTREME CONCRETE	177105	23811001
AGELESS CONCRETE LLC	177105	23811001
RICHTER MASONRY	174101	23814006
VICKI'S GUTTERS & SIDING	176103	23816004
PITCHED RITE SEAMLESS GUTTERS	176103	23816004
SEVERSON ROOFING	176109	23816014
OLESON ROOFING & REMODELING	176109	23816014
G & K ROOFING INC	176109	23816014
UMBRELLA ROOFING INC	176109	23816014
BREAKTHROUGH CONSTRUCTION	176109	23816014
STRAND HOME IMPROVEMENT	176109	23816014
ALL DECKED OUT	179942	23819009
NORTHSIDE ELECTRIC	173101	23821007
WARREN HEATING & AIR COND	171117	23822002
UNIQUE HEATING & AIR COND	171102	23822020
CAPITOL CITY DRYWALL & PAINT	174203	23831003

ANDERSON DRYWALL & TEXTURES	174203	23831003
ACE PLASTERING	174206	23831009
DYNAMIC WALL SYSTEMS	174206	23831009
GRANT'S PAINTING	172101	23832003
B & W PAINTING CONTRACTORS	172101	23832003
GERARD'S PAINTING	172101	23832003
SPRUCE PAINTING	172101	23832003
CHHAY PAINTING SVC	172101	23832003
PRO-FECTION PAINTING	172101	23832003
GOOD WOOD FLOORS	175203	23833007
APWLLC	175203	23833007
DAVE BINGHAM FLOORING LLC	175203	23833007
MAJESTIC WOOD FLOORS INC	175203	23833007
CHARLAN TILE INSTALLATION	174301	23834005
BURNS TILE	174301	23834005
L T TILE LLC	174301	23834005
J C PREMIER SEAL LLC	177118	23899009
ROSIE'S CLEANING	734922	23899072
CARE QUALITY	734922	23899072
WILLIAM GEDKO SVC	734904	23899096
WINDOW CLEANING	734904	23899096
ALL CITY WINDOW CLEANING	734904	23899096
CLEARVIEW WINDOW WASHING SVC	734904	23899096
MNM DELI & BAKERY	546102	31181102
BELMARK INC	275912	32311202
WEBCRAFTERS INC	273298	32311703
TONY'S INSTANT LITHO PRINTING	275998	32311908
MADISON BINDERY INC	278902	32312102
BADGER DIVERSIFIED METALS INC	344403	33232204
SPECIALIZED MECHANICAL APPLCTN	358506	33341507
DECKER SUPPLY CO INC	366905	33429007
COUNTERTOP MAINTENANCE SPEC	571211	33711006
CENTER FOR INDUSTRY & COMMERCE	399903	33999936
UNIVERSAL HOSPITAL SVC	504712	42345015
DAILEY METAL GROUP	505106	42351036
BLI AMERI-STAR LIGHTING	506318	42361044
SECURITRONICS	506304	42361063
BRUSER HOERZ AUDIO	506507	42369037
MIDWEST AERIAL SVC	508403	42383042
CRAIG EQUIPMENT CORP	508426	42383050
DISTRIBUTECH USA INC	508439	42383065
TWO ANGELS CLEANING & JNTRL	508724	42385044
APPLIED DYNAMICS IN MOTION	509908	42399026
ANGKOR THOM MARKET	514105	42441005
KUHN & ASSOC	516925	42469028
HIEBING'S REFRIGERATION	507804	42512079
NORTHGATE AUTO INC	551103	44112005
PACKERS AUTO & CYCLE	551103	44112005
FAMILY AUTO SALES	551103	44112005
CAMPERLAND RV	556103	44121005
WEAVER AUTO PARTS	553111	44131011
SSK FURNITURE & GIFTS	571216	44211012
MATTRESSES & MORE	571220	44211024
CARPET CONCEPTS FLOORING SLTNS	571305	44221001
BEAUTIFUL WINDOW LLC	571917	44229109
KIRCH APPLIANCE INC	572202	44311104
KIRBY CO	572216	44311126
HERITAGE CU 24 AUDIO RESP	573113	44311203
FAMILY CELLULAR	599902	44311204

AKL SECURITY SYSTEMS	573107	44311218
AFFORDABLE SATELLITE & TV	573107	44311218
AURORA PC	573407	44312001
ADEPT COMPUTER SVC LLC	573407	44312001
HUMAN HEAD STUDIOS	573401	44312007
PEOPLE SOURCE SVC	573401	44312007
MENARDS	521138	44411002
DORN TRUE VALUE HARDWARE	525104	44413005
FIRST NATION SUPPLY	521135	44419028
LA HISPANA GROCERY	541105	44511003
MADISON PANTRY FOOD MART	541103	44512001
HUNZA INC	541103	44512001
JACOBSON BROTHERS MEATS & DELI	542107	44521006
GARY R GOYKE	549920	44529912
VIC PIERCE WINES & LIQUORS	592102	44531004
SPEEDWAY CONVENIENCE	554101	44719005
FRANCOIS OIL-CITGO QUICK MART	554101	44719005
CLARK GAS STATION	554101	44719005
DAVIS DANCEWEAR ETC	569904	44815016
SAVIDUSKYS	563202	44815018
LOTTIE'S & MARV TRUMAN'S SEAMS	569932	44819001
ENDURANCE HOUSE	566101	44821007
KAPPEL'S CLOCK SHOP	594407	44831003
JEWELERS WORKSHOP	594409	44831012
SUTER'S GOLD MEDAL SPORTS	594113	45111055
FRUGAL MUSE BOOKS MUSIC	594201	45121105
FELLY'S FLOWERS	599201	45311001
BASKETWORKS	599201	45311001
FLORAL STUDIO AT 301	599201	45311001
CORNERSTONE MOBILE BOOKS	594311	45321014
DORAS GIFTS & BEYOND	594712	45322013
VALIANT	594718	45322027
NORTHGATE ANTIQUE MALL	593202	45331001
GOODWILL INDUSTRIES OF SOUTH	593222	45331041
NOAH'S ARK PET CTR	599930	45391003
TOBACCO OUTLET PLUS	599301	45399102
SONY PICTURES DIGITAL NETWORKS	599926	45399853
GUESS TRANSPORT INC	421205	48411004
GOLD CROSS COURIER SVC INC	421205	48411004
AFFORDABLE MOVERS	421401	48411009
MIDWEST MOTOR EXPRESS INC	421304	48423013
KOSCHKEE TRANSFER INC	421309	48423017
CAPITOL EXPRESS LIMOUSINE SVC	411903	48532002
SUNSET LIMOUSINE SVC LLC	411903	48532002
A1 WHITE LIMO	411903	48532002
ENCORE LIMOUSINE & SEDAN INC	411903	48532002
JIM'S KLASS ACT LIMO	411903	48532002
DURHAM SCHOOL SVC	414201	48551002
FITCHBURG TOWING	754901	48841006
KOSCHKEE LOGISTICS	473101	48851011
ABERG MINI WAREHOUSES	422505	49311008
MAXIMUM INK MUSIC MAGAZINE	271101	51111003
MADISON ADVERTISING-PUBLISHING	273198	51113001
YOUR KEYS PUBLISHING	273101	51113003
WYETH DIGITAL WIZARDS	781211	51211016
JIM SCHULER FREE LANCE	781211	51211016
SIMPLY CREATIVE PRODUCTIONS	781211	51211016
A T & T WIRELESS	481207	51721014
M & I BANK	602101	52211002

HERITAGE CREDIT UNION	606101	52213003
WEBCRAFTERS EMPLOYEES CU	606101	52213003
CASH STORE	614101	52229103
WELLS FARGO HOME MORTGAGE	616201	52229202
INVESTORS MORTGAGE LLC	616201	52229202
AUGUST ROUSSEL	616201	52229202
EDWARD JONES	621105	52311002
EDWARD JONES	621105	52311002
ROBERT L ALLBRIGHT	621105	52311002
620 INVESTMENTS	621111	52391001
FISH & SCHULKAMP	641112	52421001
AMERICAN FAMILY INSURANCE	641112	52421001
LOR YANG INSURANCE	641112	52421001
ANDERSON NOLAN INSURANCE AGCY	641112	52421001
GANDER CONSULTING GROUP LLC	641104	52429804
APEX REMODELING INC	651303	53111002
CAMELOT APARTMENTS	651303	53111002
LAKEWOOD GARDENS	651303	53111002
BRIARWOOD APARTMENTS	651303	53111002
YAHARA LANDING APARTMENTS	651303	53111002
FULLER'S WOODS APARTMENTS	651303	53111002
LAKESHORE APARTMENTS MNTNC	651303	53111002
CHEROKEE GARDEN CONDOMINIUMS	651301	53111004
SHERMAN TERRACE CONDOMINIUMS	651301	53111004
NORTHGATE SHOPPING CTR	651201	53112008
MARTINSON REAL ESTATE	653118	53121003
PRESSENTIN CO	653118	53121003
WILLIAM A DABB	653118	53121003
KRISTIN VOMHOF	653118	53121003
RE/MAX PREFERRD	653118	53121003
L L VENTURE GROUP	653118	53121003
RENAISSANCE REALTY	653118	53121003
NATIONAL REALTY MANAGEMENT INC	653118	53121003
CAROL CERNIGLIA REALTY	653118	53121003
KELLER WILLIAMS REALTY	653118	53121003
LUIHNK	653108	53121005
SPRAGUE CO	653108	53121005
COAL-MORTON MANAGEMENT SVC	653108	53121005
APEX PROPERTY MANAGEMENT	653108	53121005
MANCHESTER PROPERTIES CORP	653108	53121005
API CONSULTANTS INC	653109	53132001
BADGERLAND APPRAISALS	653116	53132003
ASSOCIATED REAL ESTATE	653116	53132003
HOME INSPECTING PARTNER INC	653122	53139008
JAQUISH HOME INSPECTIONS LLC	653122	53139008
BADGER HOME INSPECTION SVC	653122	53139008
SIRVA RELOCATION	653101	53139014
AVIS RENT A CAR	751401	53211101
U-HAUL CO	751303	53212016
VIDEO LAND	784102	53223006
COMPLETE VIDEO GRAPHICS	784102	53223006
LORGE & LORGE LAW FIRM	811103	54111002
KATHLEEN MC NEIL	811103	54111002
ANDERSEN LAW OFFICE	811103	54111002
VICTOR SCHWARTZ	811103	54111002
HAROLD W WILKIE	811103	54111002
SWINGEN LAW OFFICE	811103	54111002
WESTMONT LAW OFFICES	811103	54111002
LINDA MONROE LAW OFFICE	811103	54111002

JOHNSON LAW OFFICES	811103	54111002
PRE-PAID LEGAL SVC INC	811113	54111015
RENAISSANCE RESOURCES LLC	738953	54119903
H & R BLOCK TAX SVC	729101	54121301
HOME LAND GARDEN	78103	54132004
TLJ DESIGNS	78103	54132004
MID-AMERICA PLANNING SVC	874824	54132011
M P SQUARED STRUCTURAL ENGNRS	871137	54133058
HOME HIGHLIGHTS HOME STAGING	871146	54133065
VINTAGE HARVEST ESTATE	738981	54135002
SILVER LEAF DESIGN GALLERY	738902	54141003
DECOR & YOU	738902	54141003
HOUSE TO HOME INTERIORS LLC	738902	54141003
ATOMIC STUDIOS	733604	54143002
GEO ANALYTICS	737103	54151105
R R SOFTWARE INC	737103	54151105
NEURAND	737103	54151105
CARBON CREATIONS	737311	54151217
NONPROFIT TECH	737911	54151903
CAZAM TRAINING	874802	54161212
STRATTON GILMORE GROUP	874214	54161302
PAGET GROUP	874214	54161302
SONY MEDIA SOFTWARE	874213	54161303
PACKARD DEB MARKETING	874213	54161303
PRAIRIE WRITING SVC	874880	54169058
WASTECAP WISCONSIN	873118	54171138
BENTLEY GOVERNMENT AFFAIRS	874301	54182002
EFFECTIVE COMMUNICATIONS	874302	54182004
UPS STORE	733101	54186007
DAIRY ENGINEERING CO	731908	54187005
REENTRY PRODUCTION LLC	731908	54187005
MADISON SIGN LETTERING	738905	54189014
CLAYTON PHOTOGRAPHY	722101	54192110
BELLA NOZZE	722101	54192110
JUDITH SPARKLES PHOTOGRAPHY	722101	54192110
VOUVE PHOTOGRAPHY	722101	54192110
JEN ROH PHOTOGRAPHY	722101	54192110
MILT LEIDNER PHOTOGRAPHERS	722101	54192110
SUSAN ROBERTS DVM	74201	54194009
ANIMAL NATURAL MEDICINE INC	74201	54194009
NORTHSIDE ANIMAL HOSPITAL	74201	54194009
MAX WEBER	738913	54199001
WHIPPOORWILLCALL ON-LINE AUCTN	738901	54199002
DANE COUNTY JOB CTR	736103	56131102
GREAT LAKES GEOGRAPHIC	738951	56142201
SOLUTIONS UNLIMITED	733407	56143906
FOX WATER	738984	56149907
BURKHALTER TRAVEL & CRUISE	472406	56151001
TRAVEL-EASE INC	472402	56151007
MERIDIAN TRAVEL CONNECTION	472402	56151007
CRAWFORD & ASSOC	738110	56161104
QUEST INVESTIGATIVE & FISCAL	738110	56161104
TERMINATOR PEST CONTROL	734201	56171009
GUARDIAN PEST CONTROL INC	734201	56171009
MAINTENANCE SERVICES-MADISON	734902	56172001
A B JANITORIAL SVC	734902	56172001
GRANT HOME SVC LLC	734902	56172001
FALCON UNIVERSAL	734902	56172001
ERIC LONG MAINTENANCE SVC	734902	56172001

SQUEAKY KLEANERS	734902	56172001
CLEAN-UP CREW	734902	56172001
BIG MARK'S CLEANING SVC	734902	56172001
JUDY SCHENK'S PRO CLEANING LLC	734902	56172001
BEST BUDS	78204	56173009
ANDERSON LANDSCAPE CONSTR	78204	56173009
GARDENWORKS LLP	78204	56173009
WE CARE LAWN SVC & LANDSCAPING	78206	56173011
CHAPIN SERVICES	78206	56173011
C & C LAWN CARE	78206	56173011
RELIABLE TREE & LANDSCAPE SVC	78301	56173022
TITAN TREE CARE	78301	56173022
A WINDCHIMES LAWN & TREE SVC	78301	56173022
APEX TREE SVC	78301	56173022
AJER'S PROFESSIONAL TREE CARE	78301	56173022
BOZACKI'S TREE TRIMMING	78301	56173022
ALDON THOMAS TREE TRIMMING	78301	56173022
REALTY TREE LLC	78301	56173022
FLOOR THERAPY	721704	56174001
B G'S CARPET & UPHOLSTERY LLC	721704	56174001
MR STEAM PROFESSIONAL CARPET	721704	56174001
MADISON FISHING EXPO	738948	56192004
ON THE ROAD LIQUIDATORS	738958	56199014
IRON MOUNTAIN	738990	56199019
TROPICAL ROOTER	769902	56299102
ROCKET ROOTER EAST	769902	56299102
SHERMAN MIDDLE SCHOOL	821103	61111007
SHABAZZ HIGH SCHOOL	821103	61111007
DURHAM SCHOOL SVC	821103	61111007
GLASS GEM	822298	61121002
MADISON TECHNICAL COLLEGE	822101	61131009
SHAD'S PIANO PLACE	829918	61161005
VIRGINIA DAVIS SCHOOL OF DANCE	791101	61161011
CPR PLUS	829910	61169913
U W HEALTH PHYSICIANS PLUS	801101	62111107
DEIRDRE A BURNS MD	801101	62111107
KOK-PENG YU MD	801101	62111107
WENDY S COLEMAN MD	801101	62111107
ROBERT E LINDEN MD	801101	62111107
RADIANCE SKIN THRPY & LASER	801101	62111107
KNUDSON & SMITH SC	801101	62111107
EXCELLENCE IN DENTISTRY	802101	62121003
MC CUE DENTAL CLINIC	802101	62121003
MADISON CHIROPRACTIC NORTH	804101	62131002
SEEDS OF HOPE INC	804931	62139905
HEALTH ENHANCING	804901	62139933
IMPAC MEDICAL SYSTEMS	801104	62149301
SOSIAB CARE	808201	62161001
SOLE TO SOUL REFLEXOLOGY LLC	809909	62199926
DOULAS OF S CENTRAL WISCONSIN	806903	62231002
COVENTRY GROUP HOME	836116	62399007
UNITED WAY 211	832201	62411004
SEGUES PROVIDING MOVING ASSTNC	832206	62412003
PARENTAL STRESS CTR	832218	62419012
SAFE HAVEN	832218	62419012
SOPORT	832218	62419012
FSAT INC	832218	62419012
DANE COUNTY TIME BANK INC	832218	62419012
JOB SERVICE	833108	62431007

CHILD DEVELOPMENT INC	835101	62441003
KSM	835101	62441003
PHOENIX RESTORATIONS	899908	71100000
MOBILE MUSIC	792908	71151004
BLAZIN' D J'S	792908	71151004
JUKE BOX BANDSTAND	792908	71151004
MADISON MOBILE DJ SVC	792908	71151004
MIDWEST RENT A DJ	792908	71151004
ESCORT BY PRETTY WOMEN	792227	71151026
INTENT TO SEDUCE	792227	71151026
SIMPLE PLEASURES	792227	71151026
DISCREET SEDUCTION	792227	71151026
ELEGANT SEDUCTIONS	792227	71151026
LIMITED RESTRICTIONS LLC	792227	71151026
ACCESS GRANTED ADULT ENTRTN	792227	71151026
GOVERNOR'S MANSION	841201	71211001
TENNEY PARK LOCKS	799951	71219004
MAPLE BLUFF COUNTRY CLUB	799706	71391001
MARYLEE RENOVATIONS	449304	71393003
MAUI CAR RENTALS	799101	71394011
OBE WON KENOBE TRAINING CTR	799101	71394011
ESQUIRE CLUB	581208	72211019
MANNA CAFE & BAKERY	581208	72211019
PIZZA EXTREME	581208	72211019
NEW ORLEANS TAKE OUT	581208	72211019
AMERICAN TABLE FAMILY RSTRNT	581208	72211019
GREAT CHINA	581208	72211019
CHINA WOK	581208	72211019
CAFE LA BELLI ITALIA	581208	72211019
CHINA PALACE	581208	72211019
EINSTEIN BROS BAGELS	546101	72221302
CHOCOLATE SHOPPE ICE CREAM	581203	72221313
SMOKY JON'S NO 1B-B-Q	581212	72232001
WIGGIE'S	581301	72241001
J T'S FRIENDLY TAVERN	581301	72241001
BUSSE'S MARKWAY TAVERN INC	581301	72241001
VILLA TAP	581301	72241001
INFERNO	581304	72241006
BREWERS MOBIL RV SVC	753811	81111119
POLLOCK AUTO BODY CO	753201	81112102
ZIPPY LUBE	754903	81119101
DIAMOND SHINE DETAIL	754203	81119201
NERD2GO	737801	81121206
MACWORKS LLC	737801	81121206
SECUREMYHOMECOMPUTER.COM	737801	81121206
CLASSIC FURNITURE LLC	764105	81142006
INMAN FURNITURE RESTORATION	764105	81142006
CHAIRS 4U2 DAY	764105	81142006
HEEL & SOLE CONNECTION	725102	81143005
SHINJU REFINISHING	769985	81149002
NORTHGATE BARBER SHOP	724101	81211101
LOIS & CO INC	723106	81211202
DUWAYNE'S SALON	723106	81211202
TRENDSETTERS	723106	81211202
COST CUTTERS FAMILY HAIR CARE	723106	81211202
REFLECTIONS-HAIR PROFESSIONALS	723106	81211202
JOHN CHARLES HAIR DESIGNERS	723106	81211202
MASSAGE EAST	729917	81219908
SALLY K'S	729917	81219908

JAN'S PROFESSIONAL MASSAGE	729917	81219908
ISTHMUS MASSAGE THERAPY	729917	81219908
DEIDRE BUCKINGHAM	729917	81219908
MASSAHHGE LLC	729917	81219908
AIRBRUSH SUNLESS TANNING	729944	81219910
RYAN FUNERAL HOME	726103	81221002
LAUNDRY LAND	721501	81231001
KLINKE CLEANERS	721201	81232002
CLASSIC CLEANERS	721201	81232002
INDEPENDENT ESCORTS	729903	81299015
TEMPORARILY YOURS FEMALE	729903	81299015
TIE THE KNOT	729935	81299032
ST PAUL LUTHERAN CHURCH	866107	81311008
MADISON COMMUNITY 7TH DAY	866107	81311008
JOSEPH J TZOUGROS	866106	81311009
ISLAMIC OUTREACH RESOURCES	866110	81311021
FAMILY ENHANCEMENT	839908	81331101
COMMUNITY CARE SYSTEMS INC	839908	81331101
CORNERSTONE CSP	839905	81331103
AL-ANON FAMILY GROUPS	839902	81331905
RESPITE CENTER	839998	81331908
BLACKSMITH HOUSE CSP	839998	81331908
EXCHANGE CENTER-CHILD ABUSE	839998	81331908
SIDDHA YOGA MEDITATION CTR	869910	81341029
HOUSING INITIATIVES	861102	81391002
EMPLOYMENT & TRAINING ASSN	912103	92112007
NEIGHBORHOOD INTERVENTION	912103	92112007
FORWARD SERVICES CORP INC JOB	912103	92112007
DANE COUNTY CHILDREN FIRST	912103	92112007
MAPLE BLUFF FIRE DEPT	922404	92216003
DANE COUNTY FOSTER CARE PRGRM	944103	92313002
VOCATIONAL REHABILITATION DIV	944102	92313004
UNEMPLOYMENT INSURANCE	944102	92313004
UNEMPLOYMENT INSURANCE HEARING	944102	92313004
CONSERVATION CORP	951202	92412005
ROYAL NORWEGIAN CONSULATE	972101	92812003
COLLINS SORRENTINO INC	999977	99999001
MAPLE BLUFF BEACH	999977	99999001
NPOINT	999977	99999001
ENTERPRISES RMM	999977	99999001
STUTZ ASSOCIATES	999977	99999001
CRUISIN LLC	999977	99999001
JOHA ROTH VENTURE	999977	99999001
GREAT LAKES INTER-TRIBAL CNCL	999977	99999001
ESM TECHNOLOGIES	999977	99999001
A RODGERS & ASSOC INC	999977	99999001
5250 E TERRACE	999977	99999001
BRIGHTER CONCEPTS-SOLATUBE	999977	99999001
OFFICE ONCALL	999977	99999001
ALC CONTROLS	999977	99999001
HISTORIC OAK RESTORATION	999977	99999001

Packers Avenue Sub-Area

Company	SIC	NAICS
SOLID STATE CONSTRUCTION	152103	23611505
T C BUILDING SPECIALISTS	152103	23611505
CARLSON CONSTRUCTION LLC	152144	23611512
CAPITOL IMAGE BUILDING	152105	23611816

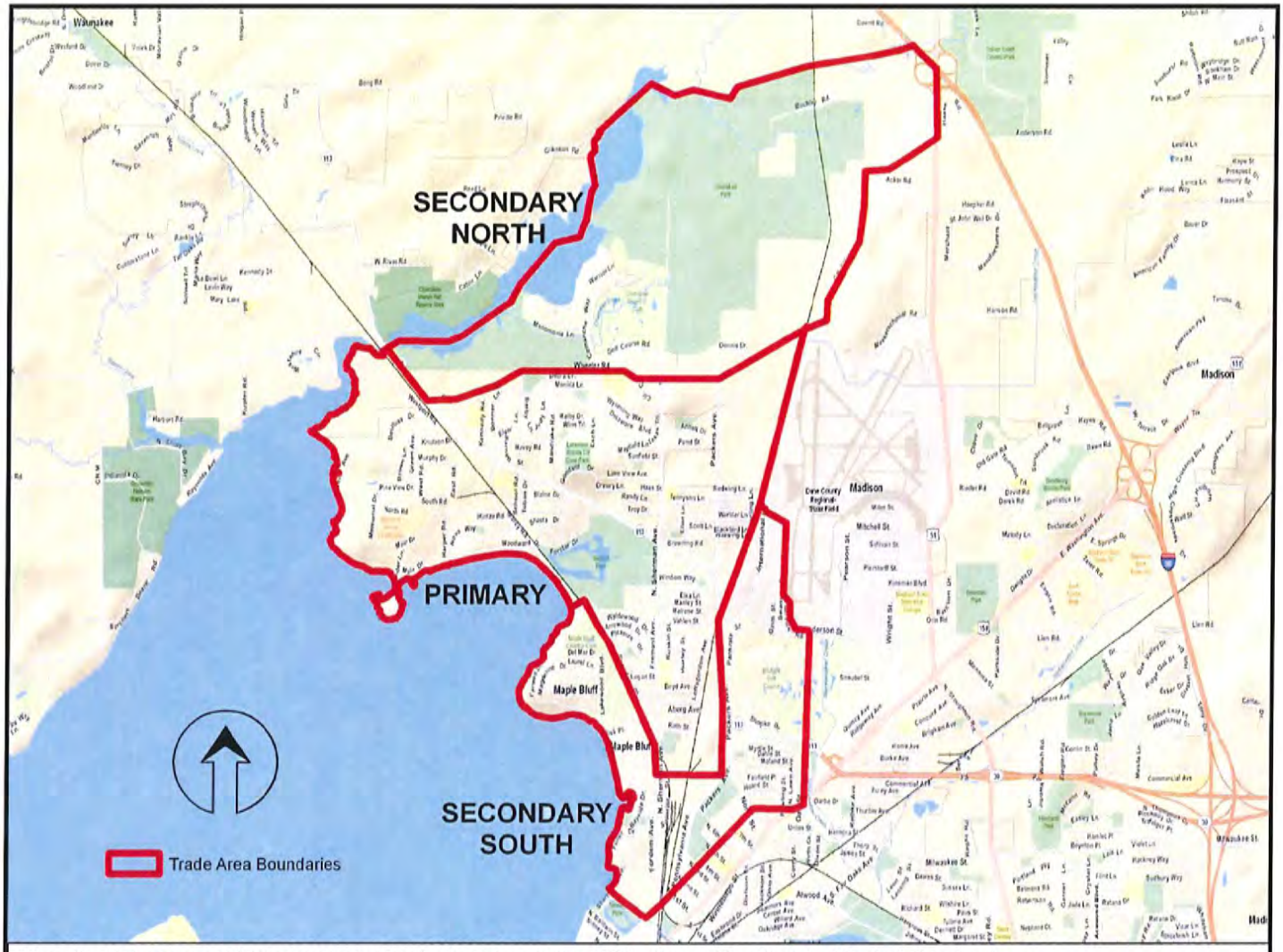
THERING CONSTRUCTION	177105	23811001
NUZZO ROOFING & SIDING	176109	23816014
CHRIS'S CABLING	173110	23821001
CAPITOL COMMUNICATIONS	173112	23821022
MC CULLOUGH PLUMBING INC	171105	23822025
LIONS CLUB	174205	23831006
ADVENTURE PLASTERING LLC	174206	23831009
ARTISAN EXTERIORS LLC	174206	23831009
RYLANDER REX WOOD CARVING	175106	23835013
KRAFT FOODS-OSCAR MEYER	201101	31161102
QUICKSILVER PRESS INC	275202	32311009
BERNTSEN BRASS & ALUMINUM	332502	33151304
HOOPER CORP	344106	33231210
M B METALWORKS LLC	344604	33232312
PRODUCTION MACHINE & ENTS CORP	359903	33271002
KNABE TOOL WORKS INC	359903	33271002
JEFF TRAPP WINDSORS	571217	33712205
MAIN FIRE PROTECTION	506315	42361033
C B & K SUPPLY	507406	42372027
MARCLAN MOTORS	551103	44112005
AIRPORT MOTORS	551103	44112005
GTC AUTO PARTS	553111	44131011
COPPS FOOD CTR	541105	44511003
COPPS PHARMACY	591205	44611009
KELLEY WILLIAMSON CO	554101	44719005
P D Q	554101	44719005
PAYLESS SHOE SOURCE	566101	44821007
WHEELS FOR WINNERS	594141	45111006
DEON'S LIVE BAIT	594133	45111017
SPENCER'S PRO SHOP	594113	45111055
RESALE RECORDS	573501	45122001
SHOPKO	531102	45211101
ROSE PETALS	599201	45311001
HARTMEYER ICE ARENA	599977	45399840
WISCONSIN & SOUTHERN RAILROAD	401101	48211102
UNION PACIFIC RAILROAD CO	401101	48211102
O'MARA MOVING SYSTEMS INC	421401	48411009
O'MARA MOVING SYSTEMS INC	421401	48411009
OLD DOMINION FREIGHT LINE INC	421309	48423017
UNION CAB OF MADISON CO-OP	412101	48531002
BJ'S LIMO SVC-MADISON	411903	48532002
A A CITYWIDE TOWING CO	754904	48841001
PENN GROUP	422505	49311008
PRESS TIME	272198	51112003
CHARTER COMMUNICATIONS	484101	51521001
BROADWING COMMUNICATIONS	481302	51791916
ASSOCIATED BANK	602101	52211002
HERITAGE CREDIT UNION	606101	52213003
QUORUM FEDERAL CREDIT UNION	606101	52213003
CAG DEVELOPMENT LLC	653118	53121003
QUALITY MANAGEMENT INC	653108	53121005
ALAMO RENT-A-CAR	751401	53211101
HERTZ RENT A CAR	751401	53211101
PETER BAUGHER	811103	54111002
ARCHITECTURAL DESIGN-PLANNING	871202	54131001
GEO-METRA SURVEYING & MAPPING	871301	54137002
GEO METRA SURVEYING & MPPNG	871301	54137002
EARTH CITIZEN DESIGN	733603	54143006
HIGH IMPACT APPAREL	738942	54149001

TRYON GROUP	874820	54169010
BEX FOTO	722101	54192110
CYNTHIA'S PORTRAIT ART	722101	54192110
DIVERSIFIED SERVICES	899999	54199009
AL PARKING ENFORCEMENT	738102	56161208
ADC LOCK & KEY	769962	56162204
REDDI ROOTER SEWER SVC	769902	56299102
MARK'S REDDI ROOTER	769902	56299102
EMERSON ELEMENTARY SCHOOL	821103	61111007
MADISON AREA TECHNICAL COLLEGE	822101	61131009
MADISON AIKIDO CLUB	799945	61162014
YOGA FOR CHILDREN & FAMILYS	799949	61169914
WOMEN IN TRANSITION	806301	62221001
BASHFORD NUTRITION SITE	832206	62412003
SUNSET CHILD CARE	835101	62441003
DENNIS NECHVATAL	899912	71100000
BRIDGES GOLF COURSE	799201	71391002
EAST MADISON LITTLE LEAGUE	799708	71399006
LOCKER ROOM SPORTS BAR & GRILL	581301	72241001
SLICES	581301	72241001
TIP TOP TAVERN	581301	72241001
SIMM'S PLACE	581301	72241001
CHET'S CAR CARE	753801	81111104
AUTO GLASS SPECIALISTS	753801	81111104
KATHYS AUTO SVC & REPAIR	753801	81111104
BILL'S AUTO & TRUCK SVC	753801	81111104
WOLFE'S AUTO	753801	81111104
CHET'S AUTO SVC & REPAIR INC	753801	81111104
RICK'S AUTO REPAIR	753801	81111104
HOUSE OF HOSE POWER & CUSTOM	753204	81112106
PC-COM	737801	81121206
HAIR FLAIR	723106	81211202
SPA WOOF	75204	81291021
BASHFORD UNITED METHODIST CHR	866107	81311008
JAMES REEB UNITARIAN CHURCH	866107	81311008
BASHFORD PRAYER PHONE	866107	81311008
UNITED REFUGEE SVC OF WIS	839998	81331908
GRIEG CLUB	864108	81341004
AMERICAN POSTAL WORKERS UNION	863101	81393001
UNITED FOOD & COMMERCIAL WRKRS	863101	81393001
APPRENTICESHIP STANDARDS	912102	92112008
REPRESENTATIVE SCOTT JENSEN	912102	92112008
US ARMY RESERVE CTR	971101	92811003
SECOND REVOLUTION	999977	99999001
ZUMHAGEN-KRAUSE	999977	99999001
APU INC	999977	99999001
J P CULLEN & SONS INC	999977	99999001

APPENDIX C – NORTHSIDE DEMOGRAPHICS

The demographic data and sales estimates for the primary and secondary Northside trade areas were provided by ESRI and used by R.A. Smith National in the Northside Market Analysis.

The primary and secondary trade areas are described beginning on page 10 of the study, and depicted in the map below.



Map 5 - Primary and Secondary Trade Areas - City of Madison Northside Market Analysis *R.A. Smith National, Inc.*

R A Smith National
Beyond Surveying and Engineering

Market Profile

MunicipalCivilDivision

Area ID: Madison

Demographic	MunicipalCivilDivision
2000 Total Population	208,140
2000 Group Quarters	12,944
2008 Total Population	227,137
2013 Total Population	239,759
2008-2013 Annual Rate	1.09%
2000 Households	89,070
2000 Average Household Size	2.19
2008 Households	99,744
2008 Average Household Size	2.15
2013 Households	106,462
2013 Average Household Size	2.13
2008-2013 Annual Rate	1.31%
2000 Families	42,226
2000 Average Family Size	2.87
2008 Families	46,357
2008 Average Family Size	2.84
2013 Families	48,630
2013 Average Family Size	2.83
2008-2013 Annual Rate	0.96%
2000 Housing Units	92,470
Owner Occupied Housing Units	45.8%
Renter Occupied Housing Units	50.5%
Vacant Housing Units	3.7%
2008 Housing Units	106,653
Owner Occupied Housing Units	44.5%
Renter Occupied Housing Units	49.0%
Vacant Housing Units	6.5%
2013 Housing Units	115,285
Owner Occupied Housing Units	43.0%
Renter Occupied Housing Units	49.4%
Vacant Housing Units	7.7%
Median Household Income	
2000	$41,955
2008	$55,290
2013	$65,795
Median Home Value	
2000	$137,331
2008	$213,169
2013	$225,864
Per Capita Income	
2000	$23,458
2008	$31,633
2013	$37,972
Median Age	
2000	30.8
2008	31.9
2013	32.3

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

Source: U.S. Bureau of the Census, 2000 Census of Population and Housing. ESRI forecasts for 2008 and 2013.

Area ID: Madison

Demographic	MunicipalCivilDivision
2000 Household by Income	
Household Income Base	89,380
<15,000	15.5%
$15,000 - $24,999	12.1%
$25,000 - $34,999	13.0%
$35,000 - $49,999	17.8%
$50,000 - $74,999	20.6%
$75,000 - $99,999	10.3%
$100,000 - $149,999	7.2%
$150,000 - $199,999	1.8%
$200,000+	1.5%
Average Household Income	$53,278
2008 Household by Income	
Household Income Base	99,743
<15,000	11.5%
$15,000 - $24,999	9.0%
$25,000 - $34,999	9.1%
$35,000 - $49,999	15.6%
$50,000 - $74,999	20.6%
$75,000 - $99,999	13.4%
$100,000 - $149,999	14.4%
$150,000 - $199,999	3.1%
$200,000+	3.3%
Average Household Income	$70,476
2013 Household by Income	
Household Income Base	106,461
<15,000	9.7%
$15,000 - $24,999	6.7%
$25,000 - $34,999	8.2%
$35,000 - $49,999	10.0%
$50,000 - $74,999	23.5%
$75,000 - $99,999	13.9%
$100,000 - $149,999	18.9%
$150,000 - $199,999	4.3%
$200,000+	4.8%
Average Household Income	$83,998
2000 Owner Occupied HUs by Value	
Total	42,332
<50,000	2.4%
$50,000 - $99,999	14.2%
$100,000 - $149,999	45.6%
$150,000 - $199,999	22.5%
$200,000 - $299,999	10.9%
$300,000 - $499,999	3.7%
$500,000 - $999,999	0.6%
$1,000,000 +	0.1%
Average Home Value	$154,556
2000 Specified Renter Occupied HUs by Contract Rent	
Total	46,630
With Cash Rent	98.7%
No Cash Rent	1.3%
Median Rent	$600
Average Rent	$627

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

Source: U.S. Bureau of the Census, 2000 Census of Population and Housing. ESRI forecasts for 2008 and 2013.

Area ID: Madison

Demographic	MunicipalCivilDivision
2000 Population by Age	
Total	208,141
0 - 4	5.1%
5 - 9	4.8%
10 - 14	4.9%
15 - 24	24.4%
25 - 34	17.7%
35 - 44	14.4%
45 - 54	12.9%
55 - 64	6.6%
65 - 74	4.6%
75 - 84	3.4%
85 +	1.3%
18 +	82.3%
2008 Population by Age	
Total	227,138
0 - 4	5.0%
5 - 9	4.4%
10 - 14	4.5%
15 - 24	24.0%
25 - 34	16.7%
35 - 44	13.3%
45 - 54	13.0%
55 - 64	9.5%
65 - 74	4.6%
75 - 84	3.4%
85 +	1.7%
18 +	83.2%
2013 Population by Age	
Total	239,757
0 - 4	5.1%
5 - 9	4.3%
10 - 14	4.2%
15 - 24	23.9%
25 - 34	16.2%
35 - 44	12.5%
45 - 54	12.9%
55 - 64	10.5%
65 - 74	5.4%
75 - 84	3.2%
85 +	1.8%
18 +	83.7%
2000 Population by Sex	
Males	49.2%
Females	50.8%
2008 Population by Sex	
Males	49.3%
Females	50.7%
2013 Population by Sex	
Males	49.4%
Females	50.6%

Source: U.S. Bureau of the Census, 2000 Census of Population and Housing. ESRI forecasts for 2008 and 2013.

Area ID: Madison

Demographic	MunicipalCivilDivision
2000 Population by Race/Ethnicity	
Total	208,141
White Alone	84.3%
Black Alone	5.7%
American Indian Alone	0.4%
Asian or Pacific Islander Alone	5.6%
Some Other Race Alone	1.7%
Two or More Races	2.3%
Hispanic Origin	4.2%
Diversity Index	34.0
2008 Population by Race/Ethnicity	
Total	227,136
White Alone	79.9%
Black Alone	7.0%
American Indian Alone	0.4%
Asian or Pacific Islander Alone	7.8%
Some Other Race Alone	2.3%
Two or More Races	2.6%
Hispanic Origin	5.6%
Diversity Index	42.0
2013 Population by Race/Ethnicity	
Total	239,759
White Alone	76.9%
Black Alone	7.9%
American Indian Alone	0.4%
Asian or Pacific Islander Alone	9.3%
Some Other Race Alone	2.7%
Two or More Races	2.7%
Hispanic Origin	6.7%
Diversity Index	47.0
2000 Population 3+ by School Enrollment	
Total	201,779
Enrolled in Nursery/Preschool	1.5%
Enrolled in Kindergarten	1.0%
Enrolled in Grade 1-8	8.0%
Enrolled in Grade 9-12	4.3%
Enrolled in College	16.6%
Enrolled in Grad/Prof School	4.9%
Not Enrolled in School	63.7%
2008 Population 25+ by Educational Attainment	
Total	140,943
Less Than 9th Grade	2.2%
9th to 12th Grade, No Diploma	4.0%
High School Graduate	17.5%
Some College, No Degree	18.1%
Associate Degree	8.4%
Bachelor's Degree	27.9%
Master's/Prof/Doctorate Degree	22.0%

Data Note: Persons of Hispanic Origin may be of any race. The Diversity Index measures the probability that two people from the same area will be from different race/ethnic groups.
Source: U.S. Bureau of the Census, 2000 Census of Population and Housing. ESRI forecasts for 2008 and 2013.

Area ID: Madison

Demographic	MunicipalCivilDivision

2008 Population 15+ Marital Status	
Total	195,533.0
Married	40.0%
Never Married	46.4%
Widowed	3.6%
Divorced	9.9%

2000 Population 16+ by Employment Status	
Total	175,912
In Labor Force	73.1%
Civilian Employed	69.5%
Civilian Unemployed	3.5%
In Armed Forces	0.1%
Not In Labor Force	26.9%

2008 Civilian Population 16+ in Labor Force	
Civilian Employed	94.4%
Civilian Unemployed	5.6%

2013 Civilian Population 16+ in Labor Force	
Civilian Employed	94.6%
Civilian Unemployed	5.4%

2000 Females 16+ by Employment Status and Age of Children	
Total	89,996
Own Children < 6 Only	6.4%
Employed/in Armed Forces	4.5%
Unemployed	0.3%
Not in Labor Force	1.6%
Own Children <6 and 6-17 Only	3.7%
Employed/in Armed Forces	2.5%
Unemployed	0.1%
Not in Labor Force	1.1%
Own Children 6-17 Only	11.6%
Employed/in Armed Forces	9.9%
Unemployed	0.1%
Not in Labor Force	1.5%
No Own Children < 18	78.4%
Employed/in Armed Forces	50.4%
Unemployed	2.1%
Not in Labor Force	25.9%

Source: U.S. Bureau of the Census, 2000 Census of Population and Housing. ESRI forecasts for 2008 and 2013.

Area ID: Madison

Demographic	MunicipalCivilDivision

2008 Employed Population 16+ by Industry	
Total	130,790
Agriculture/Mining	0.5%
Construction	3.2%
Manufacturing	6.3%
Wholesale Trade	1.9%
Retail Trade	10.8%
Transportation/Utilities	2.6%
Information	2.8%
Finance/Insurance/Real Estate	8.3%
Services	57.8%
Public Administration	5.8%

2008 Employed Population 16+ by Occupation	
Total	130,791
White Collar	72.7%
Management/Business/Financial	13.4%
Professional	35.1%
Sales	10.9%
Administrative Support	13.3%
Services	15.5%
Blue Collar	11.8%
Farming/Forestry/Fishing	0.2%
Construction/Extraction	2.5%
Installation/Maintenance/Repair	1.9%
Production	3.7%
Transportation/Material Moving	3.6%

2000 Workers 16+ by Means of Transportation to Work	
Total	120,171
Drove Alone - Car, Truck, or Van	65.8%
Carpooled - Car, Truck, or Van	9.7%
Public Transportation	7.1%
Walked	10.6%
Other Means	3.7%
Worked at Home	3.0%

2000 Workers 16+ by Travel Time to Work	
Total	120,171
Did not Work at Home	97.0%
Less than 5 minutes	3.2%
5 to 9 minutes	13.6%
10 to 19 minutes	42.8%
20 to 24 minutes	16.3%
25 to 34 minutes	13.7%
35 to 44 minutes	2.5%
45 to 59 minutes	2.2%
60 to 89 minutes	1.7%
90 or more minutes	1.0%
Worked at Home	3.0%
Average Travel Time to Work (in min)	18.3

2000 Households by Vehicles Available	
Total	89,009
None	11.8%
1	42.5%
2	35.9%
3	7.6%
4	1.6%
5+	0.7%
Average Number of Vehicles Available	1.5

Source: U.S. Bureau of the Census, 2000 Census of Population and Housing. ESRI forecasts for 2008 and 2013.

Area ID: Madison

Demographic	MunicipalCivilDivision
2000 Households by Type	
Total	89,070
Family Households	47.4%
Married-couple Family	36.8%
With Related Children	15.9%
Other Family (No Spouse)	10.6%
With Related Children	6.8%
Nonfamily Households	52.6%
Householder Living Alone	35.6%
Householder Not Living Alone	17.0%
Households with Related Children	22.7%
Households with Persons 65+	15.2%
2000 Households by Size	
Total	89,070
1 Person Household	35.6%
2 Person Household	34.9%
3 Person Household	13.7%
4 Person Household	10.2%
5 Person Household	3.7%
6 Person Household	1.2%
7 + Person Household	0.7%
2000 Households by Year Householder Moved In	
Total	89,010
Moved in 1999 to March 2000	31.4%
Moved in 1995 to 1998	29.8%
Moved in 1990 to 1994	13.6%
Moved in 1980 to 1989	12.0%
Moved in 1970 to 1979	6.6%
Moved in 1969 or Earlier	6.6%
Median Year Householder Moved In	1996
2000 Housing Units by Units in Structure	
Total	92,416
1, Detached	43.6%
1, Attached	4.6%
2	6.3%
3 or 4	8.6%
5 to 9	9.4%
10 to 19	8.4%
20 +	18.2%
Mobile Home	1.0%
Other	0.0%
2000 Housing Units by Year Structure Built	
Total	92,416
1999 to March 2000	1.6%
1995 to 1998	6.2%
1990 to 1994	7.4%
1980 to 1989	12.2%
1970 to 1979	17.9%
1969 or Earlier	54.7%
Median Year Structure Built	1967

Source: U.S. Bureau of the Census, 2000 Census of Population and Housing.

Area ID: Madison

Demographic **MunicipalCivilDivision**

2008 Consumer Spending shows the amount spent on a variety of goods and services by households that reside in the market area. Expenditures are shown by broad budget categories that are not mutually exclusive. Consumer spending does not equal business revenue.

Apparel & Services: Total $	$223,805,438
Average Spent	$2,243.80
Spending Potential Index	84
Computers & Accessories: Total $	$24,622,746
Average Spent	$246.86
Spending Potential Index	103
Education: Total $	$150,113,838
Average Spent	$1,504.99
Spending Potential Index	109
Entertainment/Recreation: Total $	$351,865,925
Average Spent	$3,527.69
Spending Potential Index	95
Food at Home: Total $	$462,082,472
Average Spent	$4,632.68
Spending Potential Index	95
Food Away from Home: Total $	$336,785,571
Average Spent	$3,376.50
Spending Potential Index	99
Health Care: Total $	$364,245,663
Average Spent	$3,651.81
Spending Potential Index	89
HH Furnishings & Equip: Total $	$210,415,029
Average Spent	$2,109.55
Spending Potential Index	92
Investments: Total $	$99,202,509
Average Spent	$994.57
Spending Potential Index	98
Retail Goods: Total $	$2,500,624,115
Average Spent	$25,070.42
Spending Potential Index	92
Shelter: Total $	$1,529,516,896
Average Spent	$15,334.43
Spending Potential Index	99
TV/Video/Sound Equipement:Total $	$140,212,207
Average Spent	$1,405.72
Spending Potential Index	98
Travel: Total $	$179,762,457
Average Spent	$1,802.24
Spending Potential Index	96
Vehicle Maintenance & Repairs: Total $	$94,943,550
Average Spent	$951.87
Spending Potential Index	96

Data Note: The Spending Potential Index represents the amount spent in the area relative to a national average of 100.

Source: Expenditure data are derived from the 2004 and 2005 Consumer Expenditure Surveys, Bureau of Labor Statistics. ESRI forecasts for 2008 and 2013

R.A. Smith National
Beyond Surveying and Engineering

Market Profile

TradeArea

Area ID: Primary

Demographic	TradeArea
2000 Total Population	16,635
2000 Group Quarters	714
2008 Total Population	17,074
2013 Total Population	17,675
2008-2013 Annual Rate	0.69%
2000 Households	7,035
2000 Average Household Size	2.26
2008 Households	7,356
2008 Average Household Size	2.22
2013 Households	7,675
2013 Average Household Size	2.21
2008-2013 Annual Rate	0.85%
2000 Families	4,007
2000 Average Family Size	2.93
2008 Families	4,111
2008 Average Family Size	2.90
2013 Families	4,223
2013 Average Family Size	2.89
2008-2013 Annual Rate	0.54%
2000 Housing Units	7,365
Owner Occupied Housing Units	60.5%
Renter Occupied Housing Units	35.0%
Vacant Housing Units	4.4%
2008 Housing Units	7,882
Owner Occupied Housing Units	59.1%
Renter Occupied Housing Units	34.2%
Vacant Housing Units	6.7%
2013 Housing Units	8,329
Owner Occupied Housing Units	57.5%
Renter Occupied Housing Units	34.6%
Vacant Housing Units	7.9%
Median Household Income	
2000	$41,442
2008	$53,226
2013	$63,198
Median Home Value	
2000	$111,686
2008	$169,209
2013	$177,481
Per Capita Income	
2000	$21,353
2008	$27,711
2013	$32,419
Median Age	
2000	36.7
2008	38.2
2013	38.5

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

Source: U.S. Bureau of the Census, 2000 Census of Population and Housing. ESRI forecasts for 2008 and 2013.

Area ID: Primary

Demographic	TradeArea
2000 Household by Income	
Household Income Base	7,093
<15,000	13.6%
$15,000 - $24,999	12.8%
$25,000 - $34,999	15.2%
$35,000 - $49,999	17.6%
$50,000 - $74,999	24.5%
$75,000 - $99,999	10.4%
$100,000 - $149,999	4.3%
$150,000 - $199,999	0.7%
$200,000+	0.9%
Average Household Income	$49,486
2008 Household by Income	
Household Income Base	7,356
<15,000	9.6%
$15,000 - $24,999	9.7%
$25,000 - $34,999	9.9%
$35,000 - $49,999	18.0%
$50,000 - $74,999	22.9%
$75,000 - $99,999	15.1%
$100,000 - $149,999	11.8%
$150,000 - $199,999	1.5%
$200,000+	1.5%
Average Household Income	$63,048
2013 Household by Income	
Household Income Base	7,675
<15,000	7.8%
$15,000 - $24,999	6.7%
$25,000 - $34,999	9.3%
$35,000 - $49,999	12.5%
$50,000 - $74,999	25.5%
$75,000 - $99,999	15.2%
$100,000 - $149,999	18.8%
$150,000 - $199,999	2.3%
$200,000+	2.0%
Average Household Income	$73,278
2000 Owner Occupied HUs by Value	
Total	4,437
<50,000	6.8%
$50,000 - $99,999	25.4%
$100,000 - $149,999	55.5%
$150,000 - $199,999	9.4%
$200,000 - $299,999	2.0%
$300,000 - $499,999	0.7%
$500,000 - $999,999	0.2%
$1,000,000 +	0.1%
Average Home Value	$115,171
2000 Specified Renter Occupied HUs by Contract Rent	
Total	2,601
With Cash Rent	99.0%
No Cash Rent	1.0%
Median Rent	$549
Average Rent	$520

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

Source: U.S. Bureau of the Census, 2000 Census of Population and Housing. ESRI forecasts for 2008 and 2013.

Area ID: Primary

Demographic	TradeArea
2000 Population by Age	
Total	16,634
0 - 4	6.5%
5 - 9	6.1%
10 - 14	6.5%
15 - 24	12.8%
25 - 34	15.0%
35 - 44	17.4%
45 - 54	14.8%
55 - 64	8.7%
65 - 74	6.5%
75 - 84	4.2%
85 +	1.4%
18 +	76.9%
2008 Population by Age	
Total	17,073
0 - 4	6.4%
5 - 9	5.5%
10 - 14	5.6%
15 - 24	13.8%
25 - 34	14.3%
35 - 44	14.4%
45 - 54	15.1%
55 - 64	11.7%
65 - 74	6.7%
75 - 84	4.6%
85 +	1.9%
18 +	78.7%
2013 Population by Age	
Total	17,675
0 - 4	6.6%
5 - 9	5.3%
10 - 14	5.2%
15 - 24	13.2%
25 - 34	15.5%
35 - 44	12.5%
45 - 54	14.5%
55 - 64	13.3%
65 - 74	7.4%
75 - 84	4.5%
85 +	2.1%
18 +	79.4%
2000 Population by Sex	
Males	48.7%
Females	51.3%
2008 Population by Sex	
Males	48.8%
Females	51.2%
2013 Population by Sex	
Males	48.9%
Females	51.1%

Source: U.S. Bureau of the Census, 2000 Census of Population and Housing. ESRI forecasts for 2008 and 2013.

Area ID: Primary

Demographic	TradeArea
2000 Population by Race/Ethnicity	
Total	16,634
White Alone	80.9%
Black Alone	9.2%
American Indian Alone	0.4%
Asian or Pacific Islander Alone	4.4%
Some Other Race Alone	2.0%
Two or More Races	3.1%
Hispanic Origin	4.7%
Diversity Index	39.5
2008 Population by Race/Ethnicity	
Total	17,072
White Alone	75.8%
Black Alone	11.6%
American Indian Alone	0.4%
Asian or Pacific Islander Alone	6.1%
Some Other Race Alone	2.7%
Two or More Races	3.4%
Hispanic Origin	6.5%
Diversity Index	48.1
2013 Population by Race/Ethnicity	
Total	17,673
White Alone	72.4%
Black Alone	13.1%
American Indian Alone	0.4%
Asian or Pacific Islander Alone	7.3%
Some Other Race Alone	3.3%
Two or More Races	3.6%
Hispanic Origin	7.7%
Diversity Index	53.2
2000 Population 3+ by School Enrollment	
Total	15,957
Enrolled in Nursery/Preschool	1.9%
Enrolled in Kindergarten	1.7%
Enrolled in Grade 1-8	10.6%
Enrolled in Grade 9-12	5.1%
Enrolled in College	4.0%
Enrolled in Grad/Prof School	1.3%
Not Enrolled in School	75.3%
2008 Population 25+ by Educational Attainment	
Total	11,730
Less Than 9th Grade	5.8%
9th to 12th Grade, No Diploma	6.7%
High School Graduate	30.3%
Some College, No Degree	22.1%
Associate Degree	9.9%
Bachelor's Degree	17.3%
Master's/Prof/Doctorate Degree	7.8%

Data Note: Persons of Hispanic Origin may be of any race. The Diversity Index measures the probability that two people from the same area will be from different race/ethnic groups.
Source: U.S. Bureau of the Census, 2000 Census of Population and Housing. ESRI forecasts for 2008 and 2013.

Area ID: Primary

Demographic	TradeArea
2008 Population 15+ Marital Status	
Total	14,088.0
Married	44.6%
Never Married	35.0%
Widowed	5.6%
Divorced	14.7%
2000 Population 16+ by Employment Status	
Total	13,296
In Labor Force	69.1%
Civilian Employed	65.3%
Civilian Unemployed	3.8%
In Armed Forces	0.0%
Not In Labor Force	30.9%
2008 Civilian Population 16+ in Labor Force	
Civilian Employed	92.5%
Civilian Unemployed	7.5%
2013 Civilian Population 16+ in Labor Force	
Civilian Employed	92.6%
Civilian Unemployed	7.4%
2000 Females 16+ by Employment Status and Age of Children	
Total	6,932
Own Children < 6 Only	8.3%
Employed/in Armed Forces	6.0%
Unemployed	0.9%
Not in Labor Force	1.5%
Own Children <6 and 6-17 Only	5.0%
Employed/in Armed Forces	3.2%
Unemployed	0.2%
Not in Labor Force	1.6%
Own Children 6-17 Only	13.2%
Employed/in Armed Forces	10.8%
Unemployed	0.5%
Not in Labor Force	1.9%
No Own Children < 18	73.4%
Employed/in Armed Forces	44.4%
Unemployed	2.2%
Not in Labor Force	26.8%

Source: U.S. Bureau of the Census, 2000 Census of Population and Housing. ESRI forecasts for 2008 and 2013.

Area ID: Primary

Demographic	TradeArea
2008 Employed Population 16+ by Industry	
Total	8,771
Agriculture/Mining	0.4%
Construction	5.8%
Manufacturing	11.5%
Wholesale Trade	1.8%
Retail Trade	10.8%
Transportation/Utilities	3.6%
Information	2.5%
Finance/Insurance/Real Estate	10.1%
Services	45.7%
Public Administration	7.9%
2008 Employed Population 16+ by Occupation	
Total	8,775
White Collar	61.8%
Management/Business/Financial	12.0%
Professional	23.6%
Sales	8.5%
Administrative Support	17.7%
Services	17.9%
Blue Collar	20.3%
Farming/Forestry/Fishing	0.0%
Construction/Extraction	5.0%
Installation/Maintenance/Repair	3.2%
Production	6.8%
Transportation/Material Moving	5.3%
2000 Workers 16+ by Means of Transportation to Work	
Total	8,562
Drove Alone - Car, Truck, or Van	74.1%
Carpooled - Car, Truck, or Van	14.9%
Public Transportation	6.2%
Walked	2.1%
Other Means	0.9%
Worked at Home	1.8%
2000 Workers 16+ by Travel Time to Work	
Total	8,563
Did not Work at Home	98.2%
Less than 5 minutes	2.9%
5 to 9 minutes	9.0%
10 to 19 minutes	36.6%
20 to 24 minutes	19.2%
25 to 34 minutes	20.3%
35 to 44 minutes	3.1%
45 to 59 minutes	2.9%
60 to 89 minutes	2.8%
90 or more minutes	1.4%
Worked at Home	1.8%
Average Travel Time to Work (in min)	21.5
2000 Households by Vehicles Available	
Total	7,040
None	11.4%
1	39.7%
2	37.0%
3	9.6%
4	1.6%
5+	0.6%
Average Number of Vehicles Available	1.5

Source: U.S. Bureau of the Census, 2000 Census of Population and Housing. ESRI forecasts for 2008 and 2013.

Area ID: Primary

Demographic	TradeArea
2000 Households by Type	
Total	7,034
Family Households	57.0%
Married-couple Family	40.7%
With Related Children	16.7%
Other Family (No Spouse)	16.3%
With Related Children	11.1%
Nonfamily Households	43.0%
Householder Living Alone	33.3%
Householder Not Living Alone	9.8%
Households with Related Children	27.9%
Households with Persons 65+	21.5%
2000 Households by Size	
Total	7,035
1 Person Household	33.3%
2 Person Household	35.0%
3 Person Household	14.6%
4 Person Household	10.9%
5 Person Household	3.7%
6 Person Household	1.5%
7 + Person Household	1.1%
2000 Households by Year Householder Moved In	
Total	7,039
Moved in 1999 to March 2000	21.5%
Moved in 1995 to 1998	30.2%
Moved in 1990 to 1994	13.7%
Moved in 1980 to 1989	13.9%
Moved in 1970 to 1979	9.4%
Moved in 1969 or Earlier	11.4%
Median Year Householder Moved In	1995
2000 Housing Units by Units in Structure	
Total	7,370
1, Detached	54.6%
1, Attached	4.1%
2	3.0%
3 or 4	6.6%
5 to 9	9.2%
10 to 19	7.3%
20 +	9.9%
Mobile Home	5.2%
Other	0.0%
2000 Housing Units by Year Structure Built	
Total	7,369
1999 to March 2000	0.5%
1995 to 1998	5.2%
1990 to 1994	6.8%
1980 to 1989	12.9%
1970 to 1979	14.8%
1969 or Earlier	59.8%
Median Year Structure Built	1966

Source: U.S. Bureau of the Census, 2000 Census of Population and Housing.

Area ID: Primary

Demographic	TradeArea

2008 Consumer Spending shows the amount spent on a variety of goods and services by households that reside in the market area. Expenditures are shown by broad budget categories that are not mutually exclusive. Consumer spending does not equal business revenue.

Apparel & Services: Total $	$14,582,055
Average Spent	$1,982.33
Spending Potential Index	74
Computers & Accessories: Total $	$1,558,495
Average Spent	$211.87
Spending Potential Index	89
Education: Total $	$9,256,817
Average Spent	$1,258.40
Spending Potential Index	92
Entertainment/Recreation: Total $	$23,205,092
Average Spent	$3,154.58
Spending Potential Index	85
Food at Home: Total $	$30,949,957
Average Spent	$4,207.44
Spending Potential Index	86
Food Away from Home: Total $	$22,053,594
Average Spent	$2,998.04
Spending Potential Index	88
Health Care: Total $	$25,208,095
Average Spent	$3,426.88
Spending Potential Index	84
HH Furnishings & Equip: Total $	$13,729,658
Average Spent	$1,866.46
Spending Potential Index	81
Investments: Total $	$6,464,021
Average Spent	$878.74
Spending Potential Index	87
Retail Goods: Total $	$165,127,637
Average Spent	$22,448.02
Spending Potential Index	83
Shelter: Total $	$100,131,551
Average Spent	$13,612.23
Spending Potential Index	88
TV/Video/Sound Equipement:Total $	$9,216,564
Average Spent	$1,252.93
Spending Potential Index	87
Travel: Total $	$11,835,732
Average Spent	$1,608.99
Spending Potential Index	85
Vehicle Maintenance & Repairs: Total $	$6,265,130
Average Spent	$851.70
Spending Potential Index	86

Data Note: The Spending Potential Index represents the amount spent in the area relative to a national average of 100.

Source: Expenditure data are derived from the 2004 and 2005 Consumer Expenditure Surveys, Bureau of Labor Statistics. ESRI forecasts for 2008 and 2013

Area ID: Secondary North

Demographic	TradeArea
2000 Total Population	1,822
2000 Group Quarters	2
2008 Total Population	1,912
2013 Total Population	1,997
2008-2013 Annual Rate	0.87%
2000 Households	886
2000 Average Household Size	2.05
2008 Households	952
2008 Average Household Size	2.01
2013 Households	1,003
2013 Average Household Size	1.99
2008-2013 Annual Rate	1.05%
2000 Families	569
2000 Average Family Size	2.55
2008 Families	589
2008 Average Family Size	2.53
2013 Families	606
2013 Average Family Size	2.53
2008-2013 Annual Rate	0.57%
2000 Housing Units	943
Owner Occupied Housing Units	89.0%
Renter Occupied Housing Units	5.1%
Vacant Housing Units	5.9%
2008 Housing Units	1,050
Owner Occupied Housing Units	85.6%
Renter Occupied Housing Units	5.0%
Vacant Housing Units	9.3%
2013 Housing Units	1,124
Owner Occupied Housing Units	84.1%
Renter Occupied Housing Units	5.2%
Vacant Housing Units	10.8%
Median Household Income	
2000	$62,511
2008	$78,079
2013	$87,247
Median Home Value	
2000	$158,094
2008	$223,585
2013	$232,249
Per Capita Income	
2000	$37,863
2008	$48,960
2013	$59,143
Median Age	
2000	52.6
2008	56.4
2013	57.5

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

Source: U.S. Bureau of the Census, 2000 Census of Population and Housing. ESRI forecasts for 2008 and 2013.

Area ID: Secondary North

Demographic	TradeArea
2000 Household by Income	
Household Income Base	905
<15,000	2.1%
$15,000 - $24,999	8.7%
$25,000 - $34,999	14.3%
$35,000 - $49,999	15.1%
$50,000 - $74,999	20.2%
$75,000 - $99,999	15.8%
$100,000 - $149,999	14.0%
$150,000 - $199,999	6.2%
$200,000+	3.5%
Average Household Income	$76,526
2008 Household by Income	
Household Income Base	952
<15,000	1.5%
$15,000 - $24,999	3.4%
$25,000 - $34,999	8.9%
$35,000 - $49,999	16.6%
$50,000 - $74,999	17.4%
$75,000 - $99,999	13.9%
$100,000 - $149,999	23.1%
$150,000 - $199,999	6.1%
$200,000+	9.1%
Average Household Income	$98,773
2013 Household by Income	
Household Income Base	1,004
<15,000	1.4%
$15,000 - $24,999	1.8%
$25,000 - $34,999	5.9%
$35,000 - $49,999	14.7%
$50,000 - $74,999	18.3%
$75,000 - $99,999	14.0%
$100,000 - $149,999	22.8%
$150,000 - $199,999	9.5%
$200,000+	11.6%
Average Household Income	$118,135
2000 Owner Occupied HUs by Value	
Total	841
<50,000	0.0%
$50,000 - $99,999	14.4%
$100,000 - $149,999	30.9%
$150,000 - $199,999	37.1%
$200,000 - $299,999	15.7%
$300,000 - $499,999	1.9%
$500,000 - $999,999	0.0%
$1,000,000 +	0.0%
Average Home Value	$161,348
2000 Specified Renter Occupied HUs by Contract Rent	
Total	56
With Cash Rent	83.9%
No Cash Rent	16.1%
Median Rent	$594
Average Rent	$643

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

Source: U.S. Bureau of the Census, 2000 Census of Population and Housing. ESRI forecasts for 2008 and 2013.

Area ID: Secondary North

Demographic	TradeArea
2000 Population by Age	
Total	1,822
0 - 4	2.9%
5 - 9	4.0%
10 - 14	4.9%
15 - 24	6.7%
25 - 34	5.2%
35 - 44	10.3%
45 - 54	21.8%
55 - 64	18.2%
65 - 74	15.1%
75 - 84	9.4%
85 +	1.4%
18 +	85.2%
2008 Population by Age	
Total	1,913
0 - 4	2.9%
5 - 9	3.3%
10 - 14	4.3%
15 - 24	7.8%
25 - 34	5.9%
35 - 44	8.5%
45 - 54	14.2%
55 - 64	21.5%
65 - 74	15.3%
75 - 84	12.4%
85 +	3.9%
18 +	86.5%
2013 Population by Age	
Total	1,998
0 - 4	3.1%
5 - 9	3.2%
10 - 14	4.0%
15 - 24	7.6%
25 - 34	6.8%
35 - 44	8.1%
45 - 54	12.9%
55 - 64	19.6%
65 - 74	18.0%
75 - 84	11.6%
85 +	5.4%
18 +	86.9%
2000 Population by Sex	
Males	44.7%
Females	55.3%
2008 Population by Sex	
Males	44.7%
Females	55.3%
2013 Population by Sex	
Males	44.5%
Females	55.5%

Source: U.S. Bureau of the Census, 2000 Census of Population and Housing. ESRI forecasts for 2008 and 2013.

Area ID: Secondary North

Demographic	TradeArea
2000 Population by Race/Ethnicity	
Total	1,822
White Alone	97.4%
Black Alone	0.8%
American Indian Alone	0.1%
Asian or Pacific Islander Alone	0.9%
Some Other Race Alone	0.1%
Two or More Races	0.8%
Hispanic Origin	0.9%
Diversity Index	6.6
2008 Population by Race/Ethnicity	
Total	1,911
White Alone	96.4%
Black Alone	1.0%
American Indian Alone	0.1%
Asian or Pacific Islander Alone	1.5%
Some Other Race Alone	0.1%
Two or More Races	0.9%
Hispanic Origin	1.3%
Diversity Index	9.5
2013 Population by Race/Ethnicity	
Total	1,996
White Alone	95.5%
Black Alone	1.3%
American Indian Alone	0.1%
Asian or Pacific Islander Alone	1.9%
Some Other Race Alone	0.1%
Two or More Races	1.1%
Hispanic Origin	1.6%
Diversity Index	11.6
2000 Population 3+ by School Enrollment	
Total	1,821
Enrolled in Nursery/Preschool	1.4%
Enrolled in Kindergarten	1.9%
Enrolled in Grade 1-8	7.4%
Enrolled in Grade 9-12	4.2%
Enrolled in College	2.7%
Enrolled in Grad/Prof School	0.8%
Not Enrolled in School	81.7%
2008 Population 25+ by Educational Attainment	
Total	1,563
Less Than 9th Grade	0.0%
9th to 12th Grade, No Diploma	2.8%
High School Graduate	24.4%
Some College, No Degree	21.4%
Associate Degree	9.9%
Bachelor's Degree	23.9%
Master's/Prof/Doctorate Degree	17.6%

Data Note: Persons of Hispanic Origin may be of any race. The Diversity Index measures the probability that two people from the same area will be from different race/ethnic groups.
Source: U.S. Bureau of the Census, 2000 Census of Population and Housing. ESRI forecasts for 2008 and 2013.

Area ID: Secondary North

Demographic	TradeArea
2008 Population 15+ Marital Status	
Total	1,712.0
Married	62.9%
Never Married	17.8%
Widowed	7.3%
Divorced	12.0%
2000 Population 16+ by Employment Status	
Total	1,602
In Labor Force	63.3%
Civilian Employed	62.5%
Civilian Unemployed	0.2%
In Armed Forces	0.6%
Not In Labor Force	36.7%
2008 Civilian Population 16+ in Labor Force	
Civilian Employed	99.6%
Civilian Unemployed	0.4%
2013 Civilian Population 16+ in Labor Force	
Civilian Employed	99.6%
Civilian Unemployed	0.4%
2000 Females 16+ by Employment Status and Age of Children	
Total	893
Own Children < 6 Only	1.0%
Employed/in Armed Forces	1.0%
Unemployed	0.0%
Not in Labor Force	0.0%
Own Children <6 and 6-17 Only	2.2%
Employed/in Armed Forces	0.0%
Unemployed	0.0%
Not in Labor Force	2.2%
Own Children 6-17 Only	12.8%
Employed/in Armed Forces	12.8%
Unemployed	0.0%
Not in Labor Force	0.0%
No Own Children < 18	84.0%
Employed/in Armed Forces	49.5%
Unemployed	0.0%
Not in Labor Force	34.5%

Source: U.S. Bureau of the Census, 2000 Census of Population and Housing. ESRI forecasts for 2008 and 2013.

Area ID: Secondary North

Demographic	TradeArea
2008 Employed Population 16+ by Industry	
Total	1,022
Agriculture/Mining	0.0%
Construction	4.9%
Manufacturing	9.1%
Wholesale Trade	3.4%
Retail Trade	6.6%
Transportation/Utilities	1.6%
Information	0.7%
Finance/Insurance/Real Estate	19.1%
Services	48.5%
Public Administration	6.2%
2008 Employed Population 16+ by Occupation	
Total	1,021
White Collar	82.2%
Management/Business/Financial	27.6%
Professional	26.1%
Sales	11.4%
Administrative Support	17.1%
Services	9.3%
Blue Collar	8.5%
Farming/Forestry/Fishing	0.0%
Construction/Extraction	4.0%
Installation/Maintenance/Repair	2.4%
Production	0.5%
Transportation/Material Moving	1.6%
2000 Workers 16+ by Means of Transportation to Work	
Total	1,003
Drove Alone - Car, Truck, or Van	91.3%
Carpooled - Car, Truck, or Van	4.5%
Public Transportation	1.6%
Walked	0.9%
Other Means	0.0%
Worked at Home	1.7%
2000 Workers 16+ by Travel Time to Work	
Total	1,003
Did not Work at Home	98.3%
Less than 5 minutes	0.0%
5 to 9 minutes	10.3%
10 to 19 minutes	33.3%
20 to 24 minutes	24.3%
25 to 34 minutes	22.3%
35 to 44 minutes	2.3%
45 to 59 minutes	0.8%
60 to 89 minutes	4.3%
90 or more minutes	0.7%
Worked at Home	1.7%
Average Travel Time to Work (in min)	21.6
2000 Households by Vehicles Available	
Total	896
None	0.0%
1	37.4%
2	45.2%
3	16.5%
4	0.9%
5+	0.0%
Average Number of Vehicles Available	1.8

Source: U.S. Bureau of the Census, 2000 Census of Population and Housing. ESRI forecasts for 2008 and 2013.

Area ID: Secondary North

Demographic	TradeArea
2000 Households by Type	
Total	886
Family Households	64.2%
Married-couple Family	58.8%
With Related Children	14.4%
Other Family (No Spouse)	5.4%
With Related Children	2.4%
Nonfamily Households	35.8%
Householder Living Alone	30.8%
Householder Not Living Alone	5.0%
Households with Related Children	16.8%
Households with Persons 65+	37.0%
2000 Households by Size	
Total	886
1 Person Household	30.8%
2 Person Household	48.6%
3 Person Household	9.0%
4 Person Household	6.9%
5 Person Household	4.2%
6 Person Household	0.5%
7 + Person Household	0.0%
2000 Households by Year Householder Moved In	
Total	896
Moved in 1999 to March 2000	8.7%
Moved in 1995 to 1998	27.9%
Moved in 1990 to 1994	29.1%
Moved in 1980 to 1989	15.0%
Moved in 1970 to 1979	19.3%
Moved in 1969 or Earlier	0.0%
Median Year Householder Moved In	1993
2000 Housing Units by Units in Structure	
Total	964
1, Detached	33.3%
1, Attached	14.8%
2	2.1%
3 or 4	2.5%
5 to 9	20.6%
10 to 19	26.7%
20 +	0.0%
Mobile Home	0.0%
Other	0.0%
2000 Housing Units by Year Structure Built	
Total	965
1999 to March 2000	2.5%
1995 to 1998	9.9%
1990 to 1994	14.4%
1980 to 1989	28.9%
1970 to 1979	34.2%
1969 or Earlier	10.1%
Median Year Structure Built	1982

Source: U.S. Bureau of the Census, 2000 Census of Population and Housing.

Area ID: Secondary North

Demographic	TradeArea

2008 Consumer Spending shows the amount spent on a variety of goods and services by households that reside in the market area. Expenditures are shown by broad budget categories that are not mutually exclusive. Consumer spending does not equal business revenue.

Apparel & Services: Total $	$2,785,801
Average Spent	$2,926.26
Spending Potential Index	109
Computers & Accessories: Total $	$288,678
Average Spent	$303.23
Spending Potential Index	127
Education: Total $	$1,775,611
Average Spent	$1,865.14
Spending Potential Index	136
Entertainment/Recreation: Total $	$4,771,570
Average Spent	$5,012.15
Spending Potential Index	135
Food at Home: Total $	$6,069,027
Average Spent	$6,375.03
Spending Potential Index	130
Food Away from Home: Total $	$4,267,650
Average Spent	$4,482.83
Spending Potential Index	131
Health Care: Total $	$5,747,815
Average Spent	$6,037.62
Spending Potential Index	147
HH Furnishings & Equip: Total $	$2,817,202
Average Spent	$2,959.25
Spending Potential Index	129
Investments: Total $	$1,690,417
Average Spent	$1,775.65
Spending Potential Index	175
Retail Goods: Total $	$33,570,344
Average Spent	$35,262.97
Spending Potential Index	130
Shelter: Total $	$19,548,357
Average Spent	$20,533.99
Spending Potential Index	132
TV/Video/Sound Equipement:Total $	$1,784,731
Average Spent	$1,874.72
Spending Potential Index	130
Travel: Total $	$2,577,141
Average Spent	$2,707.08
Spending Potential Index	144
Vehicle Maintenance & Repairs: Total $	$1,243,764
Average Spent	$1,306.47
Spending Potential Index	132

Data Note: The Spending Potential Index represents the amount spent in the area relative to a national average of 100.

Source: Expenditure data are derived from the 2004 and 2005 Consumer Expenditure Surveys, Bureau of Labor Statistics. ESRI forecasts for 2008 and 2013

Area ID: Secondary South

Demographic	TradeArea
2000 Total Population	6,575
2000 Group Quarters	44
2008 Total Population	6,523
2013 Total Population	6,685
2008-2013 Annual Rate	0.49%
2000 Households	3,227
2000 Average Household Size	2.02
2008 Households	3,266
2008 Average Household Size	1.98
2013 Households	3,375
2013 Average Household Size	1.97
2008-2013 Annual Rate	0.66%
2000 Families	1,349
2000 Average Family Size	2.80
2008 Families	1,320
2008 Average Family Size	2.77
2013 Families	1,330
2013 Average Family Size	2.77
2008-2013 Annual Rate	0.15%
2000 Housing Units	3,345
Owner Occupied Housing Units	46.9%
Renter Occupied Housing Units	49.6%
Vacant Housing Units	3.5%
2008 Housing Units	3,448
Owner Occupied Housing Units	45.5%
Renter Occupied Housing Units	49.2%
Vacant Housing Units	5.3%
2013 Housing Units	3,600
Owner Occupied Housing Units	43.2%
Renter Occupied Housing Units	50.5%
Vacant Housing Units	6.3%
Median Household Income	
2000	$39,131
2008	$49,587
2013	$61,246
Median Home Value	
2000	$112,246
2008	$169,271
2013	$181,200
Per Capita Income	
2000	$29,770
2008	$37,659
2013	$45,893
Median Age	
2000	34.7
2008	37.1
2013	38.2

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

Source: U.S. Bureau of the Census, 2000 Census of Population and Housing. ESRI forecasts for 2008 and 2013.

Area ID: Secondary South

Demographic	TradeArea
2000 Household by Income	
Household Income Base	3,266
<15,000	11.8%
$15,000 - $24,999	15.2%
$25,000 - $34,999	15.6%
$35,000 - $49,999	21.1%
$50,000 - $74,999	19.3%
$75,000 - $99,999	5.6%
$100,000 - $149,999	4.8%
$150,000 - $199,999	2.4%
$200,000+	4.3%
Average Household Income	$60,517
2008 Household by Income	
Household Income Base	3,266
<15,000	8.7%
$15,000 - $24,999	9.5%
$25,000 - $34,999	13.0%
$35,000 - $49,999	19.4%
$50,000 - $74,999	22.2%
$75,000 - $99,999	11.1%
$100,000 - $149,999	6.6%
$150,000 - $199,999	2.7%
$200,000+	6.9%
Average Household Income	$74,541
2013 Household by Income	
Household Income Base	3,376
<15,000	7.0%
$15,000 - $24,999	6.4%
$25,000 - $34,999	10.3%
$35,000 - $49,999	13.2%
$50,000 - $74,999	28.7%
$75,000 - $99,999	13.8%
$100,000 - $149,999	10.1%
$150,000 - $199,999	2.1%
$200,000+	8.4%
Average Household Income	$90,109
2000 Owner Occupied HUs by Value	
Total	1,565
<50,000	4.4%
$50,000 - $99,999	37.9%
$100,000 - $149,999	26.3%
$150,000 - $199,999	6.8%
$200,000 - $299,999	9.6%
$300,000 - $499,999	9.6%
$500,000 - $999,999	4.6%
$1,000,000 +	0.9%
Average Home Value	$183,832
2000 Specified Renter Occupied HUs by Contract Rent	
Total	1,706
With Cash Rent	99.5%
No Cash Rent	0.5%
Median Rent	$585
Average Rent	$576

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

Source: U.S. Bureau of the Census, 2000 Census of Population and Housing. ESRI forecasts for 2008 and 2013.

Area ID: Secondary South

Demographic	TradeArea
2000 Population by Age	
Total	6,576
0 - 4	5.4%
5 - 9	4.4%
10 - 14	4.6%
15 - 24	15.2%
25 - 34	21.0%
35 - 44	18.0%
45 - 54	15.5%
55 - 64	6.5%
65 - 74	4.5%
75 - 84	3.6%
85 +	1.3%
18 +	82.8%
2008 Population by Age	
Total	6,521
0 - 4	5.0%
5 - 9	4.6%
10 - 14	4.8%
15 - 24	13.3%
25 - 34	18.9%
35 - 44	16.2%
45 - 54	16.1%
55 - 64	11.5%
65 - 74	4.3%
75 - 84	3.5%
85 +	1.7%
18 +	82.8%
2013 Population by Age	
Total	6,685
0 - 4	5.1%
5 - 9	4.3%
10 - 14	4.4%
15 - 24	13.9%
25 - 34	17.9%
35 - 44	14.4%
45 - 54	16.2%
55 - 64	13.4%
65 - 74	5.7%
75 - 84	2.9%
85 +	1.9%
18 +	83.6%
2000 Population by Sex	
Males	49.9%
Females	50.1%
2008 Population by Sex	
Males	50.3%
Females	49.7%
2013 Population by Sex	
Males	50.2%
Females	49.8%

Source: U.S. Bureau of the Census, 2000 Census of Population and Housing. ESRI forecasts for 2008 and 2013.

Area ID: Secondary South

Demographic	TradeArea
2000 Population by Race/Ethnicity	
Total	6,574
White Alone	85.7%
Black Alone	5.6%
American Indian Alone	0.5%
Asian or Pacific Islander Alone	3.2%
Some Other Race Alone	1.9%
Two or More Races	3.1%
Hispanic Origin	4.9%
Diversity Index	33.1
2008 Population by Race/Ethnicity	
Total	6,524
White Alone	81.0%
Black Alone	7.5%
American Indian Alone	0.6%
Asian or Pacific Islander Alone	4.7%
Some Other Race Alone	2.7%
Two or More Races	3.5%
Hispanic Origin	6.9%
Diversity Index	42.0
2013 Population by Race/Ethnicity	
Total	6,684
White Alone	78.1%
Black Alone	8.6%
American Indian Alone	0.6%
Asian or Pacific Islander Alone	5.7%
Some Other Race Alone	3.2%
Two or More Races	3.8%
Hispanic Origin	8.2%
Diversity Index	47.3
2000 Population 3+ by School Enrollment	
Total	6,492
Enrolled in Nursery/Preschool	2.0%
Enrolled in Kindergarten	0.6%
Enrolled in Grade 1-8	7.2%
Enrolled in Grade 9-12	3.9%
Enrolled in College	6.0%
Enrolled in Grad/Prof School	6.2%
Not Enrolled in School	74.2%
2008 Population 25+ by Educational Attainment	
Total	4,714
Less Than 9th Grade	1.8%
9th to 12th Grade, No Diploma	5.6%
High School Graduate	17.7%
Some College, No Degree	17.1%
Associate Degree	6.8%
Bachelor's Degree	30.0%
Master's/Prof/Doctorate Degree	21.0%

Data Note: Persons of Hispanic Origin may be of any race. The Diversity Index measures the probability that two people from the same area will be from different race/ethnic groups.
Source: U.S. Bureau of the Census, 2000 Census of Population and Housing. ESRI forecasts for 2008 and 2013.

Area ID: Secondary South

Demographic	TradeArea
2008 Population 15+ Marital Status	
Total	5,580.0
Married	37.4%
Never Married	44.8%
Widowed	4.2%
Divorced	13.5%
2000 Population 16+ by Employment Status	
Total	5,694
In Labor Force	78.4%
Civilian Employed	75.3%
Civilian Unemployed	3.0%
In Armed Forces	0.0%
Not In Labor Force	21.6%
2008 Civilian Population 16+ in Labor Force	
Civilian Employed	94.6%
Civilian Unemployed	5.4%
2013 Civilian Population 16+ in Labor Force	
Civilian Employed	94.7%
Civilian Unemployed	5.3%
2000 Females 16+ by Employment Status and Age of Children	
Total	2,809
Own Children < 6 Only	8.0%
Employed/in Armed Forces	5.8%
Unemployed	0.7%
Not in Labor Force	1.6%
Own Children <6 and 6-17 Only	2.8%
Employed/in Armed Forces	2.3%
Unemployed	0.0%
Not in Labor Force	0.6%
Own Children 6-17 Only	9.3%
Employed/in Armed Forces	6.9%
Unemployed	0.0%
Not in Labor Force	2.4%
No Own Children < 18	79.8%
Employed/in Armed Forces	55.5%
Unemployed	2.1%
Not in Labor Force	22.2%

Source: U.S. Bureau of the Census, 2000 Census of Population and Housing. ESRI forecasts for 2008 and 2013.

Area ID: Secondary South

Demographic	TradeArea
2008 Employed Population 16+ by Industry	
Total	4,010
Agriculture/Mining	0.4%
Construction	3.2%
Manufacturing	9.5%
Wholesale Trade	2.2%
Retail Trade	9.0%
Transportation/Utilities	5.2%
Information	1.7%
Finance/Insurance/Real Estate	7.9%
Services	54.2%
Public Administration	6.9%
2008 Employed Population 16+ by Occupation	
Total	4,009
White Collar	68.3%
Management/Business/Financial	15.2%
Professional	32.3%
Sales	8.2%
Administrative Support	12.7%
Services	17.2%
Blue Collar	14.6%
Farming/Forestry/Fishing	0.2%
Construction/Extraction	2.4%
Installation/Maintenance/Repair	1.0%
Production	6.9%
Transportation/Material Moving	4.1%
2000 Workers 16+ by Means of Transportation to Work	
Total	4,177
Drove Alone - Car, Truck, or Van	67.5%
Carpooled - Car, Truck, or Van	12.5%
Public Transportation	11.9%
Walked	2.3%
Other Means	3.7%
Worked at Home	2.2%
2000 Workers 16+ by Travel Time to Work	
Total	4,176
Did not Work at Home	97.8%
Less than 5 minutes	3.0%
5 to 9 minutes	13.4%
10 to 19 minutes	39.9%
20 to 24 minutes	14.3%
25 to 34 minutes	16.5%
35 to 44 minutes	3.0%
45 to 59 minutes	3.6%
60 to 89 minutes	1.9%
90 or more minutes	2.1%
Worked at Home	2.2%
Average Travel Time to Work (in min)	20.9
2000 Households by Vehicles Available	
Total	3,274
None	10.8%
1	44.9%
2	37.1%
3	5.5%
4	1.0%
5+	0.7%
Average Number of Vehicles Available	1.4

Source: U.S. Bureau of the Census, 2000 Census of Population and Housing. ESRI forecasts for 2008 and 2013.

Area ID: Secondary South

Demographic	TradeArea
2000 Households by Type	
Total	3,227
Family Households	41.8%
Married-couple Family	29.1%
With Related Children	11.8%
Other Family (No Spouse)	12.7%
With Related Children	8.0%
Nonfamily Households	58.2%
Householder Living Alone	40.3%
Householder Not Living Alone	17.8%
Households with Related Children	19.8%
Households with Persons 65+	14.6%
2000 Households by Size	
Total	3,227
1 Person Household	40.3%
2 Person Household	36.6%
3 Person Household	12.0%
4 Person Household	7.0%
5 Person Household	2.5%
6 Person Household	0.9%
7 + Person Household	0.6%
2000 Households by Year Householder Moved In	
Total	3,274
Moved in 1999 to March 2000	28.6%
Moved in 1995 to 1998	31.6%
Moved in 1990 to 1994	12.3%
Moved in 1980 to 1989	15.2%
Moved in 1970 to 1979	5.2%
Moved in 1969 or Earlier	7.1%
Median Year Householder Moved In	1996
2000 Housing Units by Units in Structure	
Total	3,389
1, Detached	43.2%
1, Attached	3.4%
2	7.5%
3 or 4	5.6%
5 to 9	14.0%
10 to 19	3.2%
20 +	22.5%
Mobile Home	0.6%
Other	0.0%
2000 Housing Units by Year Structure Built	
Total	3,389
1999 to March 2000	0.1%
1995 to 1998	0.6%
1990 to 1994	2.0%
1980 to 1989	5.6%
1970 to 1979	18.4%
1969 or Earlier	73.2%
Median Year Structure Built	1951

Source: U.S. Bureau of the Census, 2000 Census of Population and Housing.

Area ID: Secondary South

Demographic	TradeArea

2008 Consumer Spending shows the amount spent on a variety of goods and services by households that reside in the market area. Expenditures are shown by broad budget categories that are not mutually exclusive. Consumer spending does not equal business revenue.

Apparel & Services: Total $	$7,602,191
Average Spent	$2,327.68
Spending Potential Index	87
Computers & Accessories: Total $	$847,140
Average Spent	$259.38
Spending Potential Index	108
Education: Total $	$4,960,350
Average Spent	$1,518.78
Spending Potential Index	110
Entertainment/Recreation: Total $	$12,167,628
Average Spent	$3,725.54
Spending Potential Index	100
Food at Home: Total $	$15,819,446
Average Spent	$4,843.68
Spending Potential Index	99
Food Away from Home: Total $	$11,372,356
Average Spent	$3,482.04
Spending Potential Index	102
Health Care: Total $	$12,646,797
Average Spent	$3,872.26
Spending Potential Index	95
HH Furnishings & Equip: Total $	$7,394,453
Average Spent	$2,264.07
Spending Potential Index	98
Investments: Total $	$3,675,345
Average Spent	$1,125.34
Spending Potential Index	111
Retail Goods: Total $	$86,628,203
Average Spent	$26,524.25
Spending Potential Index	98
Shelter: Total $	$53,592,331
Average Spent	$16,409.16
Spending Potential Index	106
TV/Video/Sound Equipement:Total $	$4,802,963
Average Spent	$1,470.59
Spending Potential Index	102
Travel: Total $	$6,479,904
Average Spent	$1,984.05
Spending Potential Index	105
Vehicle Maintenance & Repairs: Total $	$3,317,619
Average Spent	$1,015.80
Spending Potential Index	102

Data Note: The Spending Potential Index represents the amount spent in the area relative to a national average of 100.

Source: Expenditure data are derived from the 2004 and 2005 Consumer Expenditure Surveys, Bureau of Labor Statistics. ESRI forecasts for 2008 and 2013

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Study Area: Custom Shapes

Summary Demographics	
2008 Population	17,074
2008 Households	7,356
2008 Median Disposable Income	$40,428
2008 Per Capita Income	$27,711

Industry Summary	Demand (Retail Potential)	Supply (Retail Sales)	Retail Gap	Leakage/Surplus Factor	Number of Businesses
Total Retail Trade and Food & Drink (NAICS 44-45, 722)	$182,819,253	$88,783,459	$94,035,794	34.6	86
Total Retail Trade (NAICS 44-45)	$156,144,174	$72,570,735	$83,573,439	36.5	62
Total Food & Drink (NAICS 722)	$26,675,079	$16,212,724	$10,462,355	24.4	24

Industry Group	Demand (Retail Potential)	Supply (Retail Sales)	Retail Gap	Leakage/Surplus Factor	Number of Businesses
Motor Vehicle & Parts Dealers (NAICS 441)	$37,301,066	$7,304,940	$29,996,126	67.2	6
Automobile Dealers (NAICS 4411)	$32,229,800	$5,343,296	$26,886,504	71.6	4
Other Motor Vehicle Dealers (NAICS 4412)	$2,962,036	$1,506,328	$1,455,708	32.6	1
Auto Parts, Accessories, and Tire Stores (NAICS 4413)	$2,109,230	$455,316	$1,653,914	64.5	1
Furniture & Home Furnishings Stores (NAICS 442)	$7,460,903	$2,065,223	$5,395,680	56.6	5
Furniture Stores (NAICS 4421)	$4,240,342	$338,282	$3,902,060	85.2	2
Home Furnishings Stores (NAICS 4422)	$3,220,561	$1,726,941	$1,493,620	30.2	3
Electronics & Appliance Stores (NAICS 443/NAICS 4431)	$7,075,200	$2,073,884	$5,001,316	54.7	8
Bldg Materials, Garden Equip. & Supply Stores (NAICS 444)	$5,531,746	$14,703,684	$-9,171,938	-45.3	6
Building Material and Supplies Dealers (NAICS 4441)	$4,817,024	$13,671,066	$-8,854,042	-47.9	5
Lawn and Garden Equipment and Supplies Stores (NAICS 4442)	$714,722	$1,032,618	$-317,896	-18.2	1
Food & Beverage Stores (NAICS 445)	$30,086,534	$5,901,835	$24,184,699	67.2	10
Grocery Stores (NAICS 4451)	$27,672,040	$2,639,561	$25,032,479	82.6	4
Specialty Food Stores (NAICS 4452)	$980,667	$1,767,035	$-786,368	-28.6	3
Beer, Wine, and Liquor Stores (NAICS 4453)	$1,433,827	$1,495,239	$-61,412	-2.1	3
Health & Personal Care Stores (NAICS 446/NAICS 4461)	$7,298,341	$4,301,539	$2,996,802	25.8	3
Gasoline Stations (NAICS 447/4471)	$25,000,555	$28,097,976	$-3,097,421	-5.8	7
Clothing and Clothing Accessories Stores (NAICS 448)	$9,390,543	$885,380	$8,505,163	82.8	4
Clothing Stores (NAICS 4481)	$7,552,741	$564,970	$6,987,771	86.1	3
Shoe Stores (NAICS 4482)	$848,561	$257,832	$590,729	53.4	1
Jewelry, Luggage, and Leather Goods Stores (NAICS 4483)	$989,241	$62,578	$926,663	88.1	0
Sporting Goods, Hobby, Book, and Music Stores (NAICS 451)	$3,430,371	$903,944	$2,526,427	58.3	3
Sporting Goods/Hobby/Musical Instrument Stores (NAICS 4511)	$1,900,542	$166,811	$1,733,731	83.9	2
Book, Periodical, and Music Stores (NAICS 4512)	$1,529,829	$737,133	$792,696	35.0	1

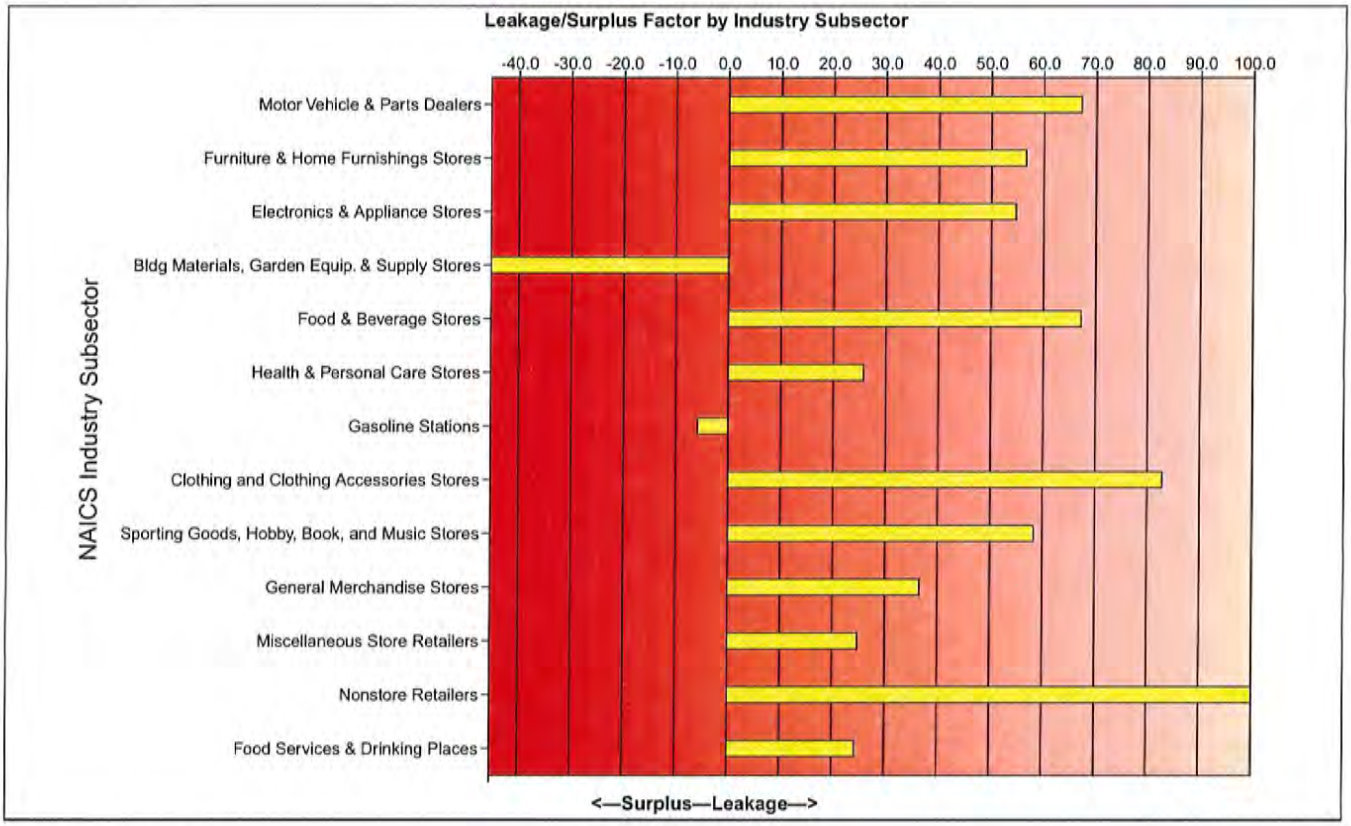
Data Note: Supply (retail sales) estimates sales to consumers by establishments. Sales to businesses are excluded. Demand (retail potential) estimates the expected amount spent by consumers at retail establishments. Supply and demand estimates are in current dollars. The Leakage/Surplus Factor presents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

Source: ESRI and *info*USA®

TradeArea2 1

Study Area: Custom Shapes

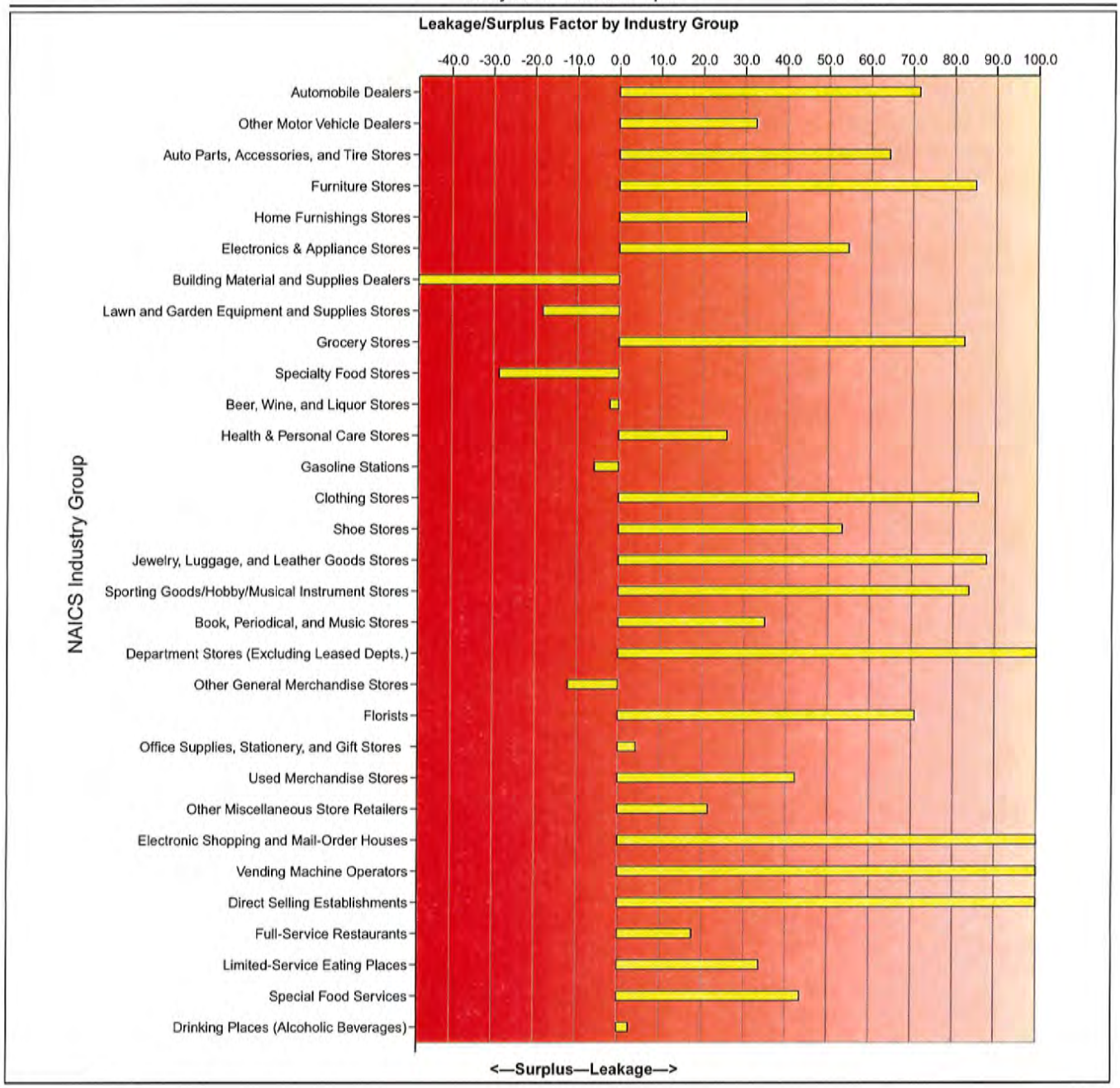
Industry Group	Demand (Retail Potential)	Supply (Retail Sales)	Retail Gap	Leakage/Surplus Factor	Number of Businesses
General Merchandise Stores (NAICS 452)	$10,649,612	$4,946,455	$5,703,157	36.6	1
Department Stores Excluding Leased Depts.(NAICS 4521)	$6,762,543	$0	$6,762,543	100.0	0
Other General Merchandise Stores (NAICS 4529)	$3,887,069	$4,946,455	$-1,059,386	-12.0	1
Miscellaneous Store Retailers (NAICS 453)	$2,299,480	$1,385,875	$913,605	24.8	9
Florists (NAICS 4531)	$548,685	$93,309	$455,376	70.9	2
Office Supplies, Stationery, and Gift Stores (NAICS 4532)	$764,815	$702,083	$62,732	4.3	2
Used Merchandise Stores (NAICS 4533)	$196,002	$79,554	$116,448	42.3	2
Other Miscellaneous Store Retailers (NAICS 4539)	$789,978	$510,929	$279,049	21.5	3
Nonstore Retailers (NAICS 454)	$10,619,823	$0	$10,619,823	100.0	0
Electronic Shopping and Mail-Order Houses (NAICS 4541)	$7,145,288	$0	$7,145,288	100.0	0
Vending Machine Operators (NAICS 4542)	$2,245,835	$0	$2,245,835	100.0	0
Direct Selling Establishments (NAICS 4543)	$1,228,700	$0	$1,228,700	100.0	0
Food Services & Drinking Places (NAICS 722)	$26,675,079	$16,212,724	$10,462,355	24.4	24
Full-Service Restaurants (NAICS 7221)	$10,107,334	$7,064,211	$3,043,123	17.7	12
Limited-Service Eating Places (NAICS 7222)	$12,203,807	$6,033,397	$6,170,410	33.8	4
Special Food Services (NAICS 7223)	$1,840,829	$723,742	$1,117,087	43.6	2
Drinking Places - Alcoholic Beverages (NAICS 7224)	$2,523,109	$2,391,374	$131,735	2.7	6



Source: ESRI and *info*USA®

TradeArea2 1

Study Area: Custom Shapes



Source: ESRI and *info*USA®

TradeArea2 2

Study Area: Custom Shapes

Summary Demographics	
2008 Population	19,086
2008 Households	8,179
2008 Median Disposable Income	$52,622
2008 Per Capita Income	$37,914

Industry Summary	**Demand (Retail Potential)**	**Supply (Retail Sales)**	**Retail Gap**	**Leakage/Surplus Factor**	**Number of Businesses**
Total Retail Trade and Food & Drink (NAICS 44-45, 722)	$277,299,248	$262,797,901	$14,501,347	2.7	87
Total Retail Trade (NAICS 44-45)	$237,152,468	$243,672,449	$-6,519,981	-1.4	64
Total Food & Drink (NAICS 722)	$40,146,780	$19,125,452	$21,021,328	35.5	23

Industry Group	**Demand (Retail Potential)**	**Supply (Retail Sales)**	**Retail Gap**	**Leakage/Surplus Factor**	**Number of Businesses**
Motor Vehicle & Parts Dealers (NAICS 441)	$57,797,689	$94,652,908	$-36,855,219	-24.2	16
Automobile Dealers (NAICS 4411)	$49,705,143	$68,822,731	$-19,117,588	-16.1	6
Other Motor Vehicle Dealers (NAICS 4412)	$4,882,613	$23,836,873	$-18,954,260	-66.0	6
Auto Parts, Accessories, and Tire Stores (NAICS 4413)	$3,209,933	$1,993,304	$1,216,629	23.4	4
Furniture & Home Furnishings Stores (NAICS 442)	$12,013,193	$459,945	$11,553,248	92.6	1
Furniture Stores (NAICS 4421)	$6,725,315	$57,443	$6,667,872	98.3	0
Home Furnishings Stores (NAICS 4422)	$5,287,878	$402,502	$4,885,376	85.9	1
Electronics & Appliance Stores (NAICS 443/NAICS 4431)	$10,884,981	$3,595,637	$7,289,344	50.3	4
Bldg Materials, Garden Equip. & Supply Stores (NAICS 444)	$9,243,896	$2,860,613	$6,383,283	52.7	2
Building Material and Supplies Dealers (NAICS 4441)	$8,080,965	$1,287,409	$6,793,556	72.5	1
Lawn and Garden Equipment and Supplies Stores (NAICS 4442)	$1,162,931	$1,573,204	$-410,273	-15.0	1
Food & Beverage Stores (NAICS 445)	$44,457,638	$18,059,759	$26,397,879	42.2	9
Grocery Stores (NAICS 4451)	$40,874,450	$15,407,221	$25,467,229	45.2	4
Specialty Food Stores (NAICS 4452)	$1,449,201	$235,423	$1,213,778	72.1	2
Beer, Wine, and Liquor Stores (NAICS 4453)	$2,133,987	$2,417,115	$-283,128	-6.2	3
Health & Personal Care Stores (NAICS 446/NAICS 4461)	$10,854,887	$1,107,262	$9,747,625	81.5	3
Gasoline Stations (NAICS 447/4471)	$36,974,851	$109,374,079	$-72,399,228	-49.5	5
Clothing and Clothing Accessories Stores (NAICS 448)	$14,143,708	$2,610,018	$11,533,690	68.8	5
Clothing Stores (NAICS 4481)	$11,335,305	$957,667	$10,377,638	84.4	3
Shoe Stores (NAICS 4482)	$1,231,503	$74,854	$1,156,649	88.5	0
Jewelry, Luggage, and Leather Goods Stores (NAICS 4483)	$1,576,900	$1,577,497	$-597	0.0	2
Sporting Goods, Hobby, Book, and Music Stores (NAICS 451)	$5,122,937	$2,229,096	$2,893,841	39.4	4
Sporting Goods/Hobby/Musical Instrument Stores (NAICS 4511)	$2,892,577	$208,234	$2,684,343	86.6	2
Book, Periodical, and Music Stores (NAICS 4512)	$2,230,360	$2,020,862	$209,498	4.9	2

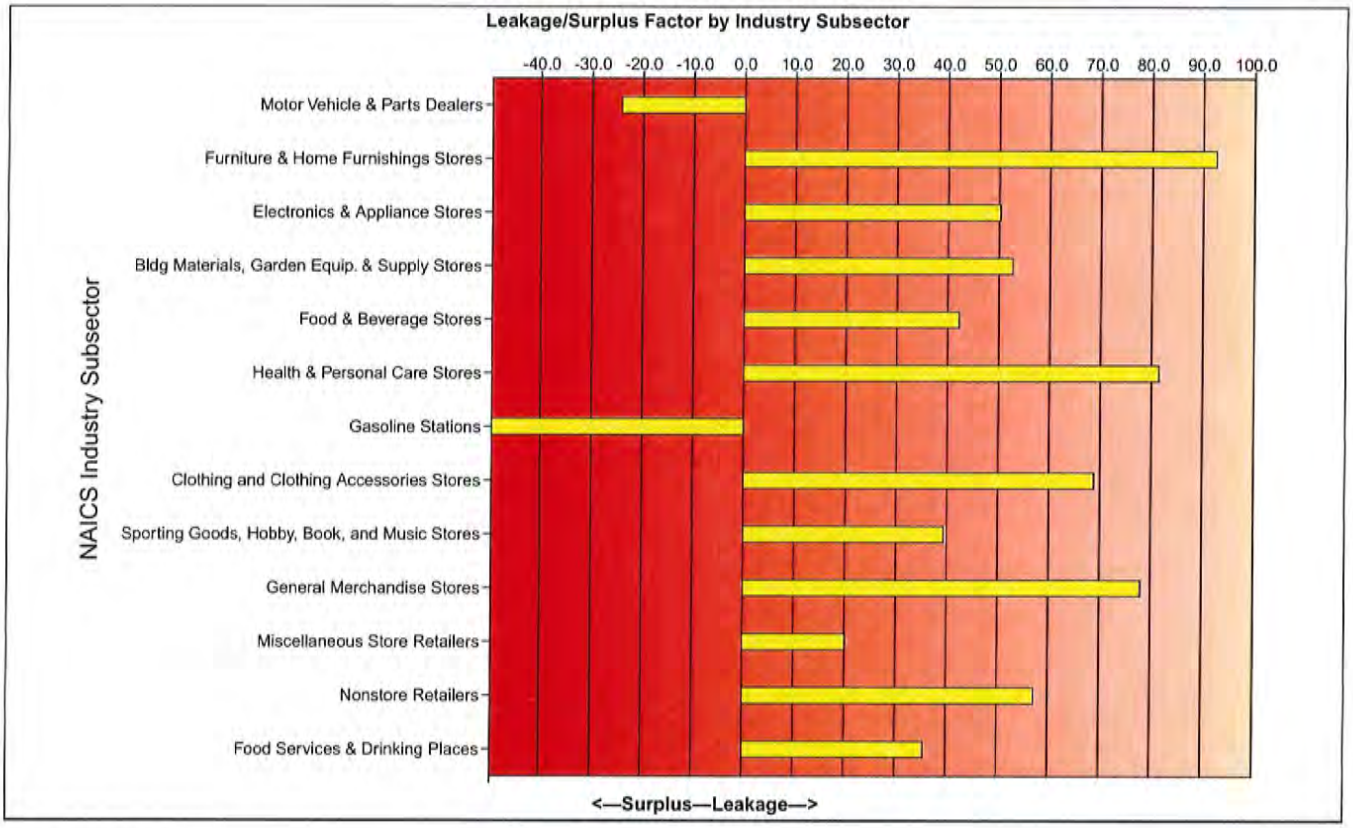
Data Note: Supply (retail sales) estimates sales to consumers by establishments. Sales to businesses are excluded. Demand (retail potential) estimates the expected amount spent by consumers at retail establishments. Supply and demand estimates are in current dollars. The Leakage/Surplus Factor presents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

Source: ESRI and *info*USA®

TradeArea2 2

Study Area: Custom Shapes

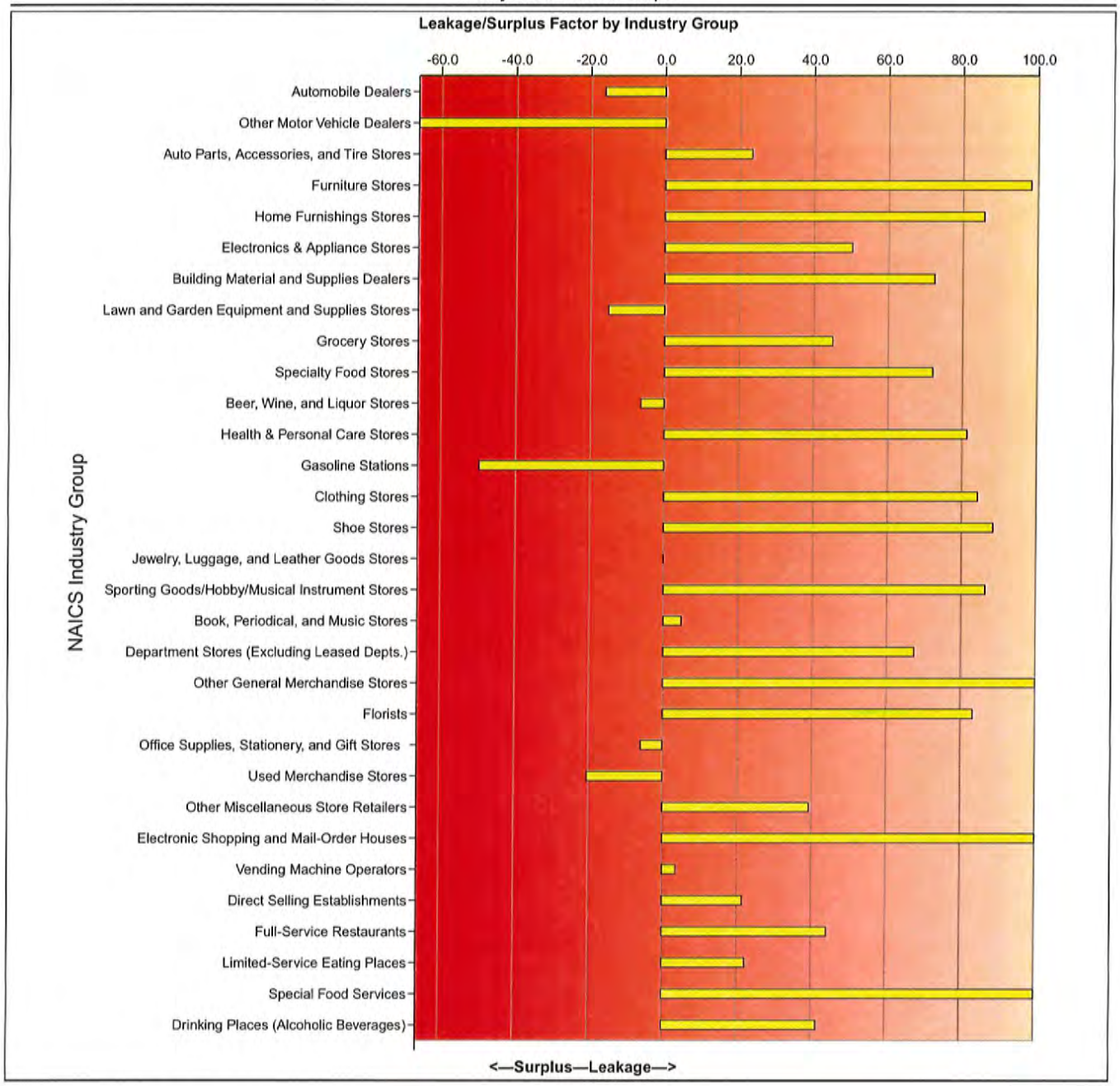
Industry Group	Demand (Retail Potential)	Supply (Retail Sales)	Retail Gap	Leakage/Surplus Factor	Number of Businesses
General Merchandise Stores (NAICS 452)	$16,085,855	$1,985,393	$14,100,462	78.0	0
Department Stores Excluding Leased Depts.(NAICS 4521)	$10,236,502	$1,985,393	$8,251,109	67.5	0
Other General Merchandise Stores (NAICS 4529)	$5,849,353	$0	$5,849,353	100.0	0
Miscellaneous Store Retailers (NAICS 453)	$3,580,943	$2,380,240	$1,200,703	20.1	13
Florists (NAICS 4531)	$891,327	$80,444	$810,883	83.4	1
Office Supplies, Stationery, and Gift Stores (NAICS 4532)	$1,169,910	$1,317,064	$-147,154	-5.9	5
Used Merchandise Stores (NAICS 4533)	$297,626	$450,573	$-152,947	-20.4	3
Other Miscellaneous Store Retailers (NAICS 4539)	$1,222,080	$532,159	$689,921	39.3	4
Nonstore Retailers (NAICS 454)	$15,991,890	$4,357,499	$11,634,391	57.2	2
Electronic Shopping and Mail-Order Houses (NAICS 4541)	$10,715,007	$0	$10,715,007	100.0	0
Vending Machine Operators (NAICS 4542)	$3,324,248	$3,096,241	$228,007	3.6	1
Direct Selling Establishments (NAICS 4543)	$1,952,635	$1,261,258	$691,377	21.5	1
Food Services & Drinking Places (NAICS 722)	$40,146,780	$19,125,452	$21,021,328	35.5	23
Full-Service Restaurants (NAICS 7221)	$15,231,476	$5,893,353	$9,338,123	44.2	11
Limited-Service Eating Places (NAICS 7222)	$18,311,530	$11,645,667	$6,665,863	22.3	9
Special Food Services (NAICS 7223)	$2,762,594	$0	$2,762,594	100.0	0
Drinking Places - Alcoholic Beverages (NAICS 7224)	$3,841,180	$1,586,432	$2,254,748	41.5	3



Source: ESRI and *info*USA®

TradeArea2 2

Study Area: Custom Shapes



Source: ESRI and *info*USA®