

Retail Market Place Analysis

Village of Monroe Comprehensive Plan



Prepared by

Turner Miller Group
planning consensus community

January 31, 2011

Introduction

It is clear from travelling around the Village that Monroe's current land use pattern is not sustainable under current economic conditions. Several of the Village's office, retail and industrial buildings have remained vacant for extended periods of times, and many of those businesses that locate in Downtown Monroe last only a few years before exhausting capital and closing their doors. Planning for future growth and establishing land use policy depends on understanding the market conditions currently in place. To this end, the economic conditions with the Village of Monroe market area has been researched with particular attention to the retail trade. This information should be helpful to policy makers in determining the extent and geography appropriate for retail use, and the types of retail use that may be reasonably anticipated if land use policy is adjusted appropriately.

Trade Markets

Turner Miller Group secured economic data from ESRI/Infogroup on the retail marketplace conditions within various distances of Monroe's downtown. The purpose of this analysis will be to determine the the most recent estimates of economic activity (sales) and projected capacity (consumer demand) for products and services within the Village of Monroe area. It is important to understand this relationship in determining whether Monroe's business district is appropriately sized to serve the surrounding retail market and to determine the demand for various types of retail and service businesses.

For the purpose of this analysis, the "focal center" of economic activity was determined to be the intersection of Lakes Road and Millpond Parkway. To determine supply and demand, one must first understand the behavior of area consumers and how willing they are to travel to purchase products and services. Generally, this distance varies, based on the product or service sought. For example, consumers generally are less willing to travel great distances to get groceries, alcoholic beverages, laundry, and hair and nail services. These type of goods and services are classified as "local trade." We estimate that in the Monroe area, consumers are generally willing to travel seven minutes by car to receive these types of services. People are generally willing to travel somewhat further for clothes, sit-down restaurants, home improvements, and home furnishings. We have dubbed these types of goods and services "area trade" and based on experience, consumers prefer to travel up to fifteen minutes by car to receive these types of goods and services. Lastly, there are more uncommon goods and services such as fine-dining and specialty restaurants, furniture stores, auto or other vehicular sales, which we believe consumers are generally willing to travel 30 minutes by car to receive. These types of goods and services, we refer to as "regional trade."

Based on these driving times, three markets have been identified, depicted on Figure E-1 and data on these three areas has been collected.:

Local Trade Market- This market is depicted by the area in red on Figure E-1 and this area is enlarged on Figure E-2. Generally it comprises the Villages of Monroe, Harriman and Kiryas Joel; most of the populated areas of the Unincorporated Town of Monroe, including the Walton and Round Lake Areas, Mansion Ridge, the Northwest side of Harriman Heights Road; some rural areas within the Village of

Woodbury along Bakertown Road and County Route 105; and some rural areas within the Town of Blooming Grove along Route 208, Craigville Road and Bull Mill Road. This area does not include Woodbury Commons Outlet Malls, but does include "big-box" retail of Harriman Commons and Woodbury Center.

Area Trade Market - This market is identified as the green area on Figure E-1 and this area is enlarged on Figure E-3. This market includes the Villages of Monroe, Kiryas Joel, Harriman, Chester, Goshen and most of the Village of Woodbury. This trade market stretches along Route 208 to the Village of Washingtonville, along Orange Turnpike to the Hamlet of Southfields, along County Route 210 almost to the Village of Greenwood Lake, along Route 94 to the Village of Florida, and along the Quickway (State Routes 6/17) almost to the Interstate 84 interchange. This area includes Woodbury Commons, and the retail areas of Central Valley, Highland Mills, Chester and much of Goshen.

Figure E-1: Retail Trade Markets

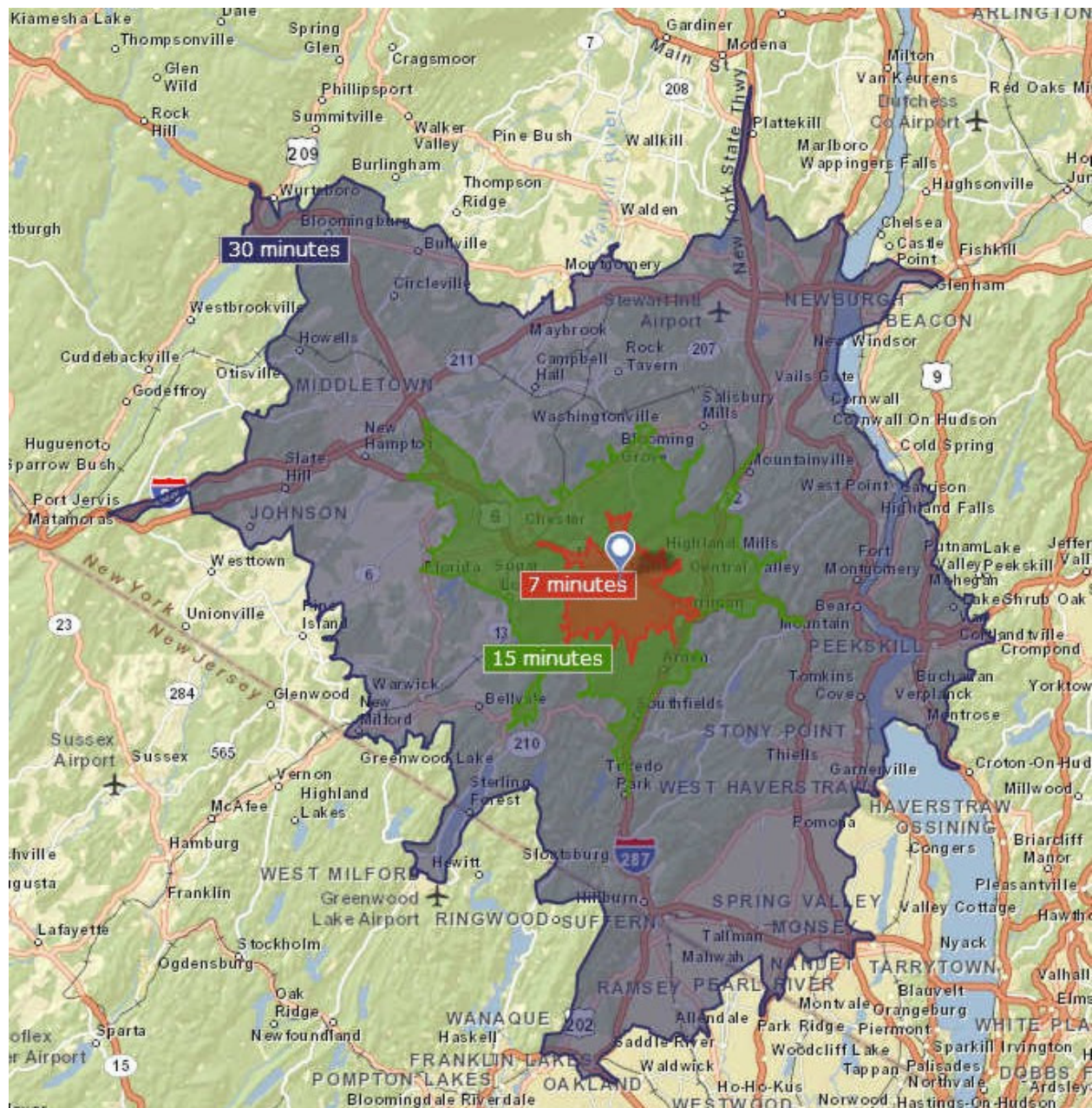


Figure E-2: Local Trade Market - 7 Minute Drive

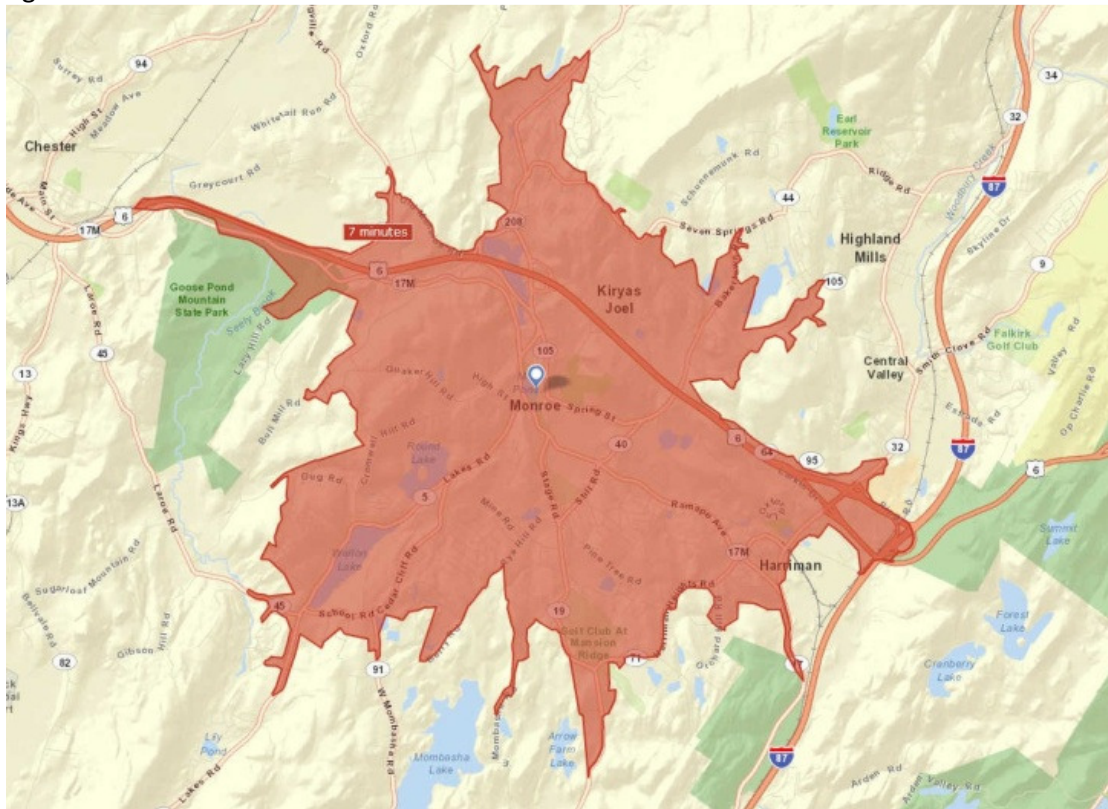
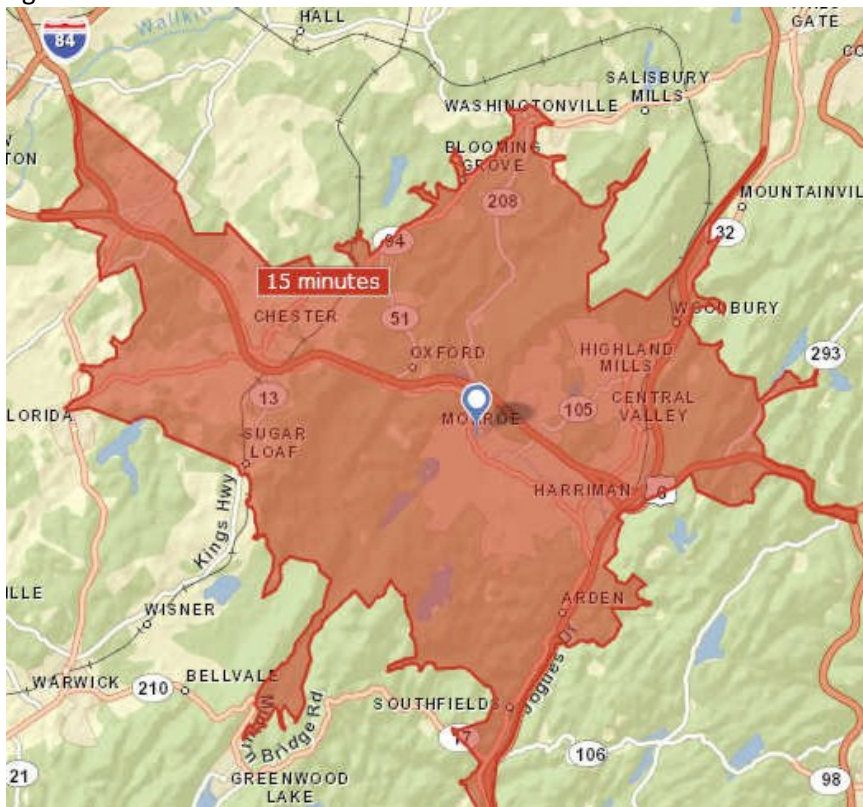
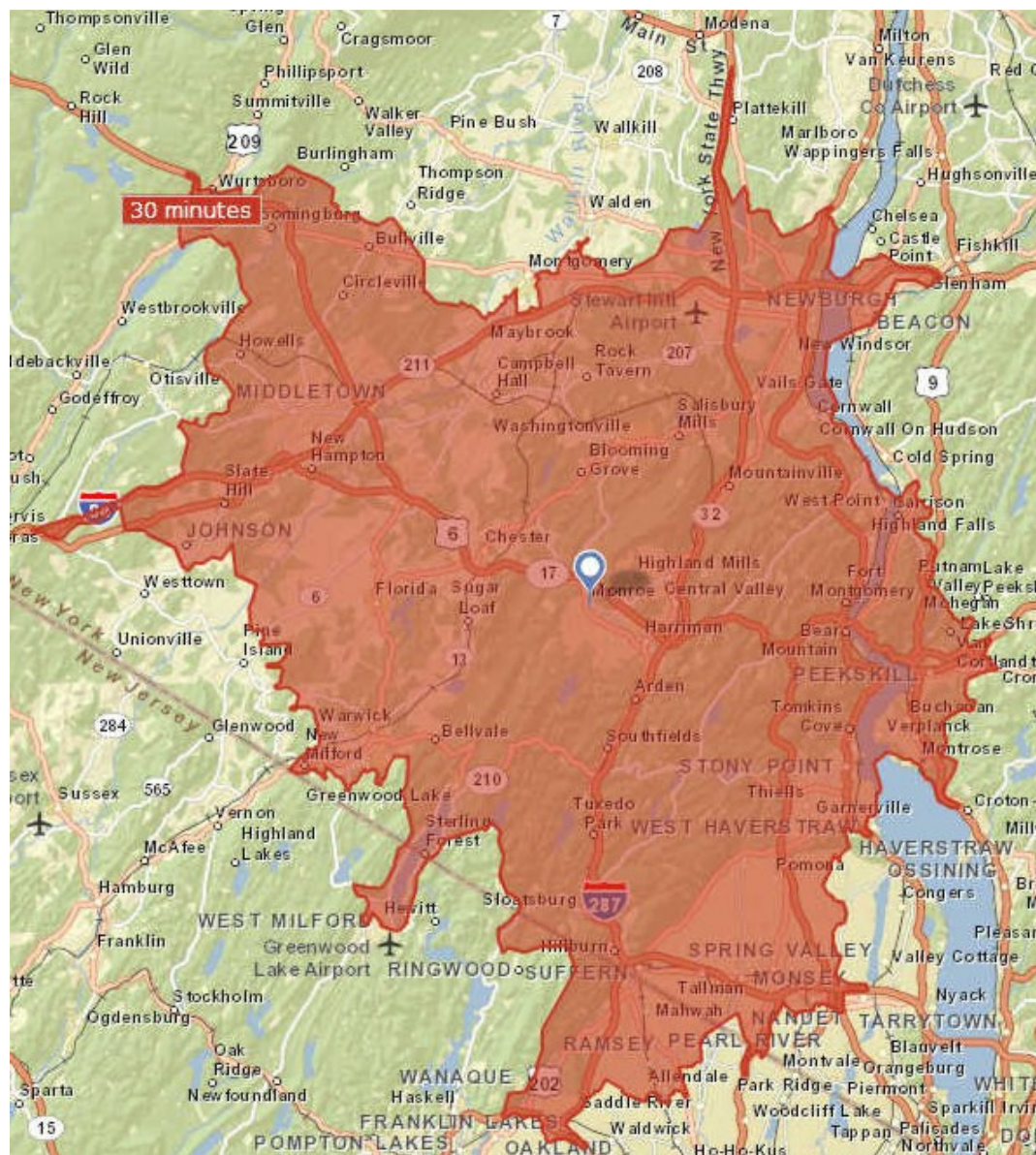


Figure E-3: Area Trade Market - 15 Minute Drive



Regional Trade Market - This market is identified as the blue area on Figure E-1 and is enlarged on Figure E-4. This market includes approximately two-thirds of Orange County (except for the northernmost and westernmost areas and some southwesterly parts of the Town of Warwick); two-thirds of Rockland County (although much of this area is State Park and outlying areas include most of Clarkstown, Orangetown and the Nyacks, Haverstraw and Piermont); northwestern Bergen County including Ramsey and Mahwah; Westchester and Putnam Counties in the vicinity of the Bear Mountain Bridge; Dutchess County in the vicinity of the Newburgh Beacon Bridge; and Sullivan County in the vicinity of Bloomingburg. This area includes significant retail offerings in Newburgh, Middletown, Ramsey and Nanuet. This area does not include the Palisades Center Outlet Mall.

Figure E-4: Regional Trade Market - 30 Minute Drive



Once the three "trade markets" were identified, economic and demographic information was compiled and analyzed to determine the overall supply and demand for retail goods and services. Additionally, information on disposable income, the number of existing businesses and employees, and the supply and demand for certain categories of retail goods and services is also available. All of this data is provided in the appendix of this report.

General Economic and Demographic Setting

	Local Market	Area Market	Regional Market
Driving Distance (min)	7	15	30
Households	10,675	24,441	205,598
Median Disposable Income	\$50,808	\$57,407	\$56,643
Average Disposable Household Income	\$62,282	\$70,438	\$73,598
Median Age	24.5	31.3	36.2
Number of Businesses	1,463	3,576	25,998
Number of Employees	8,431	27,067	238,500
Number of Retail Businesses	330	902	5,792
Number of Retail Employees	2,668	7,809	49,045
Total Retail Supply	\$419,487,777	\$1,000,000,627	\$7,255,351,850
Total Retail Demand	\$307,085,895	\$799,699,052	\$7,118,585,399
Total Retail Gap	-\$112,401,882	-\$200,301,575	-\$136,766,451
Retail Supply per Retail Business	\$1,271,175.08	\$1,108,648.15	\$1,252,650.53
Retail Demand per Household	\$28,766.83	\$32,719.57	\$34,623.81
Retail Gap as a Percentage of Sales	-26.80%	-20.03%	-1.89%
Percentage of Employees in Retail	31.65%	28.85%	20.56%
Retail Employees per Household	0.25	0.32	0.24
Retail Employees per Retail Business	8.084848485	8.657427938	8.467714088

All three of Monroe's trade markets exhibit a negative Retail Gap. That is to say that the businesses within the three markets have annual sales in excess of the annual demands of the population. This means that each of the three markets relies on consumers that reside outside of its boundaries for its annual sales. More retail dollars enter the Monroe market areas than leave it.

Local Market - General Trends

The local market shows the largest retail gap as a percentage of total retail sales. More than 25% of retail dollars spent in the local market originate from outside of the local market. This is consistent with the presence of large area businesses such as the Home Depot, Walmart, BJ's and Target within the local trade market which draw from a much broader area. The retail demand per household is lower in the local market, consistent with lower household disposable income than the Area Market or Regional Market. Businesses have fewer employees on average than the area and regional markets. This usually

indicates a larger proportion of small businesses. This same indicator shows that the size of businesses are generally consistent with the region. A large percentage of local market residents are employed in retail businesses, much higher than in the area and market. It would appear that many Monroe residents are supported by area retail businesses.

A unique quality of the local market is the lower median age. This along with a higher average household size is an indicator of an influence of the demographically unique Village of Kiryas Joel on the data. This influence is diluted with the data for the area and regional markets. Because of this effect, economics has been compared with number of households instead of populations when trying to compare economic conditions between the three trade markets.

It is important to compare data with conditions on the ground. The dependency on consumers from outside of the local market is not by itself a concern. However, when this information is coupled with the large number of commercial vacancies throughout this market, it becomes clear that there is not enough local retail demand to support the current number of businesses and commercial floor area and that generally, local businesses must draw on area and regional consumers for support. There are some exceptions to this, but these will be discussed later.

Area Market - General Trends

The Area Market clearly indicates a larger number of retail employees per household. This is likely an effect of the inclusion of Woodbury Commons within the area market. Woodbury Commons also likely contributes to the still relatively high retail gap. This area also has a higher per household disposable income than the local area, as more high-priced housing has been constructed in more rural outlying areas of Woodbury, Monroe, Goshen and Blooming Grove.

Regional Market - General Trends

The regional market has a lower median household income than the area market, but still significantly higher than the local market indicating that the majority of households in the regional market make more than the local area but less than the area market. By contrast, inclusion of areas of northwest Bergen and Westchester County and the affluent households of those areas result in higher average household incomes than the area market.

The most significant difference in the regional market from the area or local market is the almost non-existent retail gap. Generally, sales within the region equal demand. At face value, this seems intuitive, given that the area is much larger. However, the presence of Woodbury Commons a major economic engine, is more than compensated for by the much greater population that is included within the region. This makes the region a much better baseline for the lower Hudson Valley than the area market.

Trade Market Specific Supply and Demand

As stated previously, the raw retail market data is contained in the appendix of this report. We have reviewed this data to, and make the following notable observations regarding supply and demand in each trade market. We only discuss types of trade that are relevant to each market:

Local Market - Specific Observations

The local market shows significantly lower than average retail gaps (difference between retail sales at stores and retail demand of residents) for Auto Dealers, Home Furnishings, Specialty Foods, Alcohol and General Merchandise. This means that these businesses depend on a greater amount of "out-of-market" consumers to maintain sales. This may be expected for Auto Dealers and home furnishings, but indicates that the Specialty foods, alcohol and general merchandise markets may be locally overserved.

The local market also shows significantly higher than average retail gaps for boat, motorcycle and RV dealers, furniture stores, building supply, lawn and garden, health and personal care stores, gas stations, clothing stores, sporting goods, book stores, hobby stores, office supplies, pet supplies, art dealers, and restaurants and drinking places of all types. However, the area market serves to provide building supply, clothing, office supplies, pet supplies, and art dealers and most consumers are willing to travel 15 minutes to reach those types of services.

Area Market - Specific Observations

The area market shows significantly lower than average retail gaps for home furnishings stores, building materials and supplies, specialty food stores, clothing stores, general merchandise and miscellaneous merchandise retailers. These businesses are likely overserved in the area market.

The area market shows significantly higher than average retail gaps for boat, motorcycle and RV dealers, furniture stores, electronics and appliance stores, health and personal care, stores, sporting goods, book stores, hobby stores, and restaurants of all types.

Regional Market - Specific Observations

The regional market shows significantly lower than average retail gaps for automobile dealers. This type of business is likely overserved in the region. People are often willing to travel farther for a "deal" on a car, and there are several competing dealerships in the Ramsey/Mahwah, Middletown/Goshen, Newburgh/Beacon, and Nanuet areas all within the 30-minute drive regional market.

The regional market shows significantly higher than average retail gap for boat, motorcycle and RV dealers, furniture stores, electronics and appliance stores, clothing stores, lawn and garden equipment and supply, health and personal care, stores, sporting goods, book stores, hobby stores, and restaurants of all types.

Initial Recommendations:

1. The local market economic information along with the observation of several vacant storefronts indicates that the Village likely has more commercial real estate than retail demand requires. The Village may wish to seriously consider rezoning commercial areas of the Village for residential use and dividing the Route 17M corridor into nodes instead of a linear strip.
2. There is a clear demand for retail sales of motorized vehicles other-than-automobiles including boats, RVs, and motorcycles, ATVs, personal watercraft.
3. There is a clear demand for health and personal care stores in all three markets although this type of use is usually dependant on the local market and surrounding rural areas. This would indicate that there is opportunity to support additional square footage of pharmacy, optician and similar types of uses. This demand compared with the closing of Eckerds over the last five years, may indicate an access issue with that location.
4. There is a clear demand in all three markets for a furniture store, while home furnishings are overserved in the local and area markets. Home furnishings would be floor coverings, drapes, etc.
5. There is a demand in the local and regional market for clothing stores, that is more than satisfied in the area market. This seems to indicate that there may be a market for clothing beyond the type that is offered at Woodbury Commons, such as outdoor clothing, or specialty clothing such as outerwear or lingerie.
6. There is a demand in all three markets for sporting goods, book stores, and hobby stores.
7. There is a demand in all three markets for restaurants of all types. It is noted that the most unique restaurants would draw from the largest markets and therefore would likely have the highest chance at success.
8. Although locally served, there remains an area and regional demand for electronics and appliances. With the presence of big box retailers, it is not clear whether a small provider could be competitive, but an established brand such as P.C. Richards may be viable. These brands may be difficult to attract due to the distance to regional highways.
9. There seems to be some local demand for additional lawn and garden supply and equipment. There is also a demand for these services at a regional level. Area demand is weaker. It may be possible for a specialty business to successfully locate within the Village.
10. Locally, consumers generally have lower disposable incomes, while area and regional disposable incomes are much greater. The challenge confronting the Village is in satisfying the needs of local consumers with adequate economy retail providers, while drawing in higher income consumers by providing specialty and upscale offerings that do not compete with Woodbury Commons, the area retail juggernaut.

11. While there are area and regional market opportunities, the accessibility of the Village to those markets presents a problem. The Village should consider what it can do to make areas of the Village more regionally accessible. This may take cooperation with the County and or State DOT to reconsider the timing of traffic lights, alignment of roads, and turning restrictions. Additionally, the Village may want to once again consider connecting North Main Street with Main Street.

12. While "pruning" the supply of commercial land will help to strengthen the Village's remaining business areas, the Village should also consider ways in which to increase retail demand. This part of the County is somewhat underserved by higher density housing types. Providing housing at greater densities at appropriate locations and subject to design requirements could serve to bolster the Village's retail market by introducing new population segments such as young professionals. Additionally, by supporting quality higher-density housing, the demand for multifamily housing conversions to support affordable housing demand may decrease.

Conclusion:

This report is intended to provide a basis for the Village to begin to consider appropriate changes to its land use plans. We expect that the data in this report will be useful to cross-reference throughout the Master Planning process. Additionally, it is likely that some of the recommendations of the report may require reconsideration as the plan evolves.

Appendices



Business Summary

Monroe Village CBD
60 MILLPOND PKWY, MONROE, NY, 10950
Drive Time: 7, 15, 30 minutes

Latitude: 41.3285
Longitude: -74.189158

Data for all businesses in area			0 - 7 minutes		0 - 15 minutes				0 - 30 minutes			
Total Businesses:			1,463		3,576				25,998			
Total Employees:			8,431		27,067				238,500			
Total Residential Population:			41,101		82,639				621,498			
Employee/Residential Population Ratio:			0.21		0.33				0.38			
by SIC Codes	Businesses		Employees		Businesses		Employees		Businesses		Employees	
	Number	Percent	Number	Percent	Number	Percent	Number	Percent	Number	Percent	Number	Percent
Agriculture & Mining	27	1.8%	46	0.5%	76	2.1%	206	0.8%	670	2.6%	2,451	1.0%
Construction	142	9.7%	425	5.0%	329	9.2%	1,006	3.7%	2,390	9.2%	9,623	4.0%
Manufacturing	40	2.7%	198	2.3%	90	2.5%	880	3.3%	733	2.8%	16,851	7.1%
Transportation	46	3.2%	228	2.7%	85	2.4%	390	1.4%	803	3.1%	8,674	3.6%
Communication	21	1.4%	40	0.5%	35	1.0%	59	0.2%	188	0.7%	1,481	0.6%
Utility	11	0.7%	214	2.5%	21	0.6%	234	0.9%	134	0.5%	1,603	0.7%
Wholesale Trade	49	3.3%	268	3.2%	118	3.3%	932	3.4%	1,343	5.2%	12,240	5.1%
Retail Trade Summary	330	22.5%	2,668	31.7%	902	25.2%	7,809	28.9%	5,792	22.3%	49,045	20.6%
Home Improvement	25	1.7%	102	1.2%	55	1.5%	312	1.2%	350	1.3%	2,735	1.1%
General Merchandise Stores	16	1.1%	721	8.6%	25	0.7%	876	3.2%	177	0.7%	4,830	2.0%
Food Stores	42	2.9%	582	6.9%	87	2.4%	943	3.5%	623	2.4%	7,326	3.1%
Auto Dealers, Gas Stations, Auto Aftermarket	20	1.4%	284	3.4%	49	1.4%	603	2.2%	566	2.2%	5,340	2.2%
Apparel & Accessory Stores	21	1.4%	149	1.8%	122	3.4%	1,192	4.4%	411	1.6%	2,608	1.1%
Furniture & Home Furnishings	43	2.9%	75	0.9%	85	2.4%	249	0.9%	569	2.2%	2,470	1.0%
Eating & Drinking Places	79	5.4%	483	5.7%	195	5.4%	1,482	5.5%	1,569	6.0%	13,622	5.7%
Miscellaneous Retail	84	5.8%	272	3.2%	285	8.0%	2,153	8.0%	1,526	5.9%	10,114	4.2%
Finance, Insurance, Real Estate Summary	135	9.2%	550	6.5%	311	8.7%	1,401	5.2%	2,126	8.2%	11,620	4.9%
Banks, Savings & Lending Institutions	28	1.9%	115	1.4%	66	1.9%	281	1.0%	446	1.7%	2,893	1.2%
Securities Brokers	13	0.9%	8	0.1%	28	0.8%	64	0.2%	206	0.8%	668	0.3%
Insurance Carriers & Agents	28	1.9%	66	0.8%	61	1.7%	198	0.7%	424	1.6%	2,098	0.9%
Real Estate, Holding, Other Investment Offices	66	4.5%	360	4.3%	155	4.3%	858	3.2%	1,049	4.0%	5,961	2.5%
Services Summary	546	37.3%	3,381	40.1%	1,295	36.2%	11,233	41.5%	9,899	38.1%	98,372	41.2%
Hotels & Lodging	6	0.4%	13	0.2%	20	0.6%	65	0.2%	193	0.7%	3,194	1.3%
Automotive Services	43	3.0%	192	2.3%	86	2.4%	353	1.3%	792	3.0%	3,222	1.4%
Motion Pictures & Amusements	41	2.8%	267	3.2%	87	2.4%	482	1.8%	684	2.6%	4,025	1.7%
Health Services	68	4.7%	627	7.4%	194	5.4%	2,223	8.2%	1,301	5.0%	28,098	11.8%
Legal Services	3	0.2%	1	0.0%	78	2.2%	303	1.1%	435	1.7%	1,918	0.8%
Education Institutions & Libraries	40	2.7%	1,066	12.6%	80	2.2%	4,154	15.3%	617	2.4%	24,258	10.2%
Other Services	345	23.6%	1,215	14.4%	750	21.0%	3,653	13.5%	5,877	22.6%	33,658	14.1%
Government	49	3.3%	401	4.8%	186	5.2%	2,887	10.7%	1,116	4.3%	25,478	10.7%
Other	69	4.7%	12	0.1%	128	3.6%	30	0.1%	804	3.1%	1,062	0.4%
Totals	1,463	100%	8,431	100%	3,576	100%	27,067	100%	25,998	100%	238,500	100%

Source: Business data provided by Infogroup, Omaha NE Copyright 2010, all rights reserved. Esri forecasts for 2010.

January 24, 2012



Business Summary

Monroe Village CBD
60 MILLPOND PKWY, MONROE, NY, 10950
Drive Time: 7, 15, 30 minutes

Latitude: 41.3285
Longitude: -74.189158

by NAICS Codes	Businesses		Employees		Businesses		Employees		Businesses		Employees	
	Number	Percent	Number	Percent	Number	Percent	Number	Percent	Number	Percent	Number	Percent
Agriculture, Forestry, Fishing & Hunting	3	0.2%	6	0.1%	15	0.4%	55	0.2%	115	0.4%	324	0.1%
Mining	1	0.1%	5	0.1%	5	0.1%	44	0.2%	16	0.1%	107	0.0%
Utilities	5	0.3%	207	2.5%	9	0.3%	221	0.8%	59	0.2%	1,327	0.6%
Construction	152	10.4%	450	5.3%	354	9.9%	1,055	3.9%	2,548	9.8%	10,127	4.2%
Manufacturing	42	2.9%	178	2.1%	99	2.8%	841	3.1%	807	3.1%	15,498	6.5%
Wholesale Trade	46	3.1%	262	3.1%	113	3.1%	921	3.4%	1,300	5.0%	12,024	5.0%
Retail Trade	239	16.3%	2,137	25.3%	675	18.9%	6,233	23.0%	4,000	15.4%	33,724	14.1%
Motor Vehicle & Parts Dealers	14	1.0%	254	3.0%	31	0.9%	536	2.0%	367	1.4%	4,572	1.9%
Furniture & Home Furnishings Stores	18	1.2%	40	0.5%	39	1.1%	168	0.6%	248	1.0%	1,217	0.5%
Electronics & Appliance Stores	20	1.3%	32	0.4%	37	1.0%	73	0.3%	271	1.0%	1,113	0.5%
Bldg Material & Garden Equipment & Supplies Dealers	25	1.7%	102	1.2%	55	1.5%	312	1.2%	349	1.3%	2,721	1.1%
Food & Beverage Stores	37	2.5%	551	6.5%	68	1.9%	873	3.2%	512	2.0%	5,911	2.5%
Health & Personal Care Stores	20	1.3%	71	0.8%	44	1.2%	211	0.8%	299	1.1%	2,420	1.0%
Gasoline Stations	6	0.4%	30	0.4%	18	0.5%	67	0.2%	198	0.8%	768	0.3%
Clothing & Clothing Accessories Stores	27	1.9%	169	2.0%	149	4.2%	1,291	4.8%	549	2.1%	2,970	1.2%
Sport Goods, Hobby, Book, & Music Stores	15	1.0%	19	0.2%	30	0.8%	84	0.3%	247	1.0%	1,613	0.7%
General Merchandise Stores	16	1.1%	721	8.6%	25	0.7%	876	3.2%	177	0.7%	4,830	2.0%
Miscellaneous Store Retailers	37	2.5%	139	1.7%	171	4.8%	1,691	6.2%	715	2.8%	4,447	1.9%
Nonstore Retailers	4	0.3%	8	0.1%	9	0.2%	52	0.2%	68	0.3%	1,143	0.5%
Transportation & Warehousing	39	2.7%	165	2.0%	66	1.8%	276	1.0%	624	2.4%	7,431	3.1%
Information	38	2.6%	129	1.5%	73	2.1%	288	1.1%	482	1.9%	5,392	2.3%
Finance & Insurance	69	4.7%	190	2.3%	155	4.3%	543	2.0%	1,078	4.1%	5,685	2.4%
Central Bank/Credit Intermediation & Related Activities	28	1.9%	115	1.4%	66	1.9%	281	1.0%	443	1.7%	2,875	1.2%
Securities, Commodity Contracts & Other Financial	13	0.9%	8	0.1%	28	0.8%	64	0.2%	209	0.8%	700	0.3%
Insurance Carriers & Related Activities; Funds, Trusts &	28	1.9%	66	0.8%	61	1.7%	198	0.7%	427	1.6%	2,110	0.9%
Real Estate, Rental & Leasing	79	5.4%	387	4.6%	165	4.6%	893	3.3%	1,182	4.5%	6,215	2.6%
Professional, Scientific & Tech Services	99	6.8%	347	4.1%	326	9.1%	1,609	5.9%	2,210	8.5%	11,600	4.9%
Legal Services	6	0.4%	5	0.1%	93	2.6%	357	1.3%	518	2.0%	2,283	1.0%
Management of Companies & Enterprises	0	0.0%	0	0.0%	0	0.0%	0	0.0%	12	0.0%	504	0.2%
Administrative & Support & Waste Management & Remediation	81	5.6%	205	2.4%	164	4.6%	568	2.1%	1,418	5.5%	7,346	3.1%
Educational Services	46	3.1%	1,045	12.4%	90	2.5%	4,098	15.1%	735	2.8%	23,909	10.0%
Health Care & Social Assistance	109	7.4%	889	10.5%	286	8.0%	2,874	10.6%	1,929	7.4%	34,304	14.4%
Arts, Entertainment & Recreation	28	1.9%	256	3.0%	67	1.9%	462	1.7%	519	2.0%	3,748	1.6%
Accommodation & Food Services	89	6.1%	518	6.1%	229	6.4%	1,598	5.9%	1,869	7.2%	17,560	7.4%
Accommodation	6	0.4%	13	0.2%	20	0.6%	65	0.2%	193	0.7%	3,194	1.3%
Food Services & Drinking Places	83	5.6%	504	6.0%	209	5.9%	1,533	5.7%	1,675	6.4%	14,366	6.0%
Other Services (except Public Administration)	179	12.3%	644	7.6%	368	10.3%	1,473	5.4%	3,163	12.2%	14,871	6.2%
Automotive Repair & Maintenance	30	2.0%	163	1.9%	64	1.8%	297	1.1%	611	2.3%	2,517	1.1%
Public Administration	49	3.3%	401	4.8%	187	5.2%	2,987	11.0%	1,124	4.3%	25,736	10.8%
Unclassified Establishments	70	4.8%	12	0.1%	129	3.6%	28	0.1%	809	3.1%	1,068	0.4%
Total	1,463	100%	8,431	100%	3,576	100%	27,067	100%	25,998	100%	238,500	100%

Source: Business data provided by Infogroup, Omaha NE Copyright 2010, all rights reserved. Esri forecasts for 2010.

January 24, 2012

Made with Esri Business Analyst



Disposable Income Profile

Monroe Village CBD
60 MILLPOND PKWY, MONROE, NY, 10950
Drive Time: 7 minutes

Latitude: 41.3285
Longitude: -74.189158

	Census 2000	2010	2015	2010-2015 Change	2010-2015 Annual Rate
Population	32,253	41,101	44,184	3,083	1.46%
Median Age	23.3	24.5	24.9	0.4	0.32%
Households	8,593	10,675	11,404	729	1.33%
Average Household Size	3.66	3.77	3.80	0.03	0.16%

2010 Households by Disposable Income	Number	Percent
Total	10,675	100.0%
<\$15,000	1,534	14.4%
\$15,000-\$24,999	1,031	9.7%
\$25,000-\$34,999	1,064	10.0%
\$35,000-\$49,999	1,603	15.0%
\$50,000-\$74,999	2,118	19.8%
\$75,000-\$99,999	1,735	16.3%
\$100,000-\$149,999	1,237	11.6%
\$150,000-\$199,999	178	1.7%
\$200,000+	174	1.6%
Median Disposable Income	\$50,808	
Average Disposable Income	\$62,282	

2010 Disposable Income by Age of Householder	Number of Households						
	<25	25-34	35-44	45-54	55-64	65-74	75+
Total	845	2,204	1,930	2,397	1,803	826	670
<\$15,000	418	550	122	99	72	82	191
\$15,000-\$24,999	145	390	62	150	111	68	104
\$25,000-\$34,999	78	229	173	235	145	118	85
\$35,000-\$49,999	83	308	324	356	270	158	104
\$50,000-\$74,999	75	376	566	500	411	117	73
\$75,000-\$99,999	11	203	436	545	388	119	32
\$100,000-\$149,999	17	112	162	431	357	104	54
\$150,000-\$199,999	6	15	48	47	23	29	11
\$200,000+	12	20	36	35	26	31	14
Median Disposable Income	\$15,197	\$31,469	\$59,438	\$65,787	\$66,292	\$48,316	\$28,863
Average Disposable Income	\$29,545	\$43,900	\$70,229	\$75,053	\$75,976	\$73,284	\$47,330

Data Note: Disposable Income is after-tax household income. Disposable income forecasts are based on the Current Population Survey, U.S. Census Bureau. Detail may not sum to totals due to rounding

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

January 24, 2012



Disposable Income Profile

Monroe Village CBD
60 MILLPOND PKWY, MONROE, NY, 10950
Drive Time: 15 minutes

Latitude: 41.3285
Longitude: -74.189158

	Census 2000	2010	2015	2010-2015 Change	2010-2015 Annual Rate
Population	69,283	82,639	87,188	4,549	1.08%
Median Age	31.4	31.3	31.3	0.0	0.00%
Households	20,879	24,441	25,688	1,246	1.00%
Average Household Size	3.19	3.27	3.29	0.02	0.12%

2010 Households by Disposable Income	Number	Percent
Total	24,441	100.0%
<\$15,000	2,277	9.3%
\$15,000-\$24,999	1,838	7.5%
\$25,000-\$34,999	2,116	8.7%
\$35,000-\$49,999	3,818	15.6%
\$50,000-\$74,999	5,488	22.5%
\$75,000-\$99,999	4,486	18.4%
\$100,000-\$149,999	3,313	13.6%
\$150,000-\$199,999	572	2.3%
\$200,000+	534	2.2%
Median Disposable Income	\$57,407	
Average Disposable Income	\$70,438	

2010 Disposable Income by Age of Householder	Number of Households						
	<25	25-34	35-44	45-54	55-64	65-74	75+
Total	1,097	3,785	4,794	5,982	4,611	2,388	1,785
<\$15,000	442	585	191	206	186	258	409
\$15,000-\$24,999	164	471	140	275	260	234	293
\$25,000-\$34,999	109	405	320	422	354	295	211
\$35,000-\$49,999	125	619	872	844	649	451	259
\$50,000-\$74,999	129	844	1,530	1,353	1,028	389	216
\$75,000-\$99,999	36	523	1,083	1,386	1,068	276	115
\$100,000-\$149,999	54	281	452	1,130	862	342	190
\$150,000-\$199,999	12	23	120	207	98	69	43
\$200,000+	27	33	87	158	107	74	49
Median Disposable Income	\$20,578	\$44,326	\$61,072	\$72,111	\$69,270	\$48,017	\$33,760
Average Disposable Income	\$40,780	\$53,218	\$72,621	\$83,206	\$80,011	\$70,254	\$55,429

Data Note: Disposable Income is after-tax household income. Disposable income forecasts are based on the Current Population Survey, U.S. Census Bureau. Detail may not sum to totals due to rounding

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

January 24, 2012



Disposable Income Profile

Monroe Village CBD
60 MILLPOND PKWY, MONROE, NY, 10950
Drive Time: 30 minutes

Latitude: 41.3285
Longitude: -74.189158

	Census 2000	2010	2015	2010-2015 Change	2010-2015 Annual Rate
Population	572,302	621,498	637,369	15,872	0.51%
Median Age	35.1	36.2	36.0	-0.2	-0.11%
Households	191,081	206,598	211,820	5,222	0.50%
Average Household Size	2.89	2.91	2.91	0.00	0.00%

2010 Households by Disposable Income	Number	Percent
Total	206,597	100.0%
<\$15,000	18,102	8.8%
\$15,000-\$24,999	15,995	7.7%
\$25,000-\$34,999	19,103	9.2%
\$35,000-\$49,999	33,522	16.2%
\$50,000-\$74,999	45,977	22.3%
\$75,000-\$99,999	33,206	16.1%
\$100,000-\$149,999	27,436	13.3%
\$150,000-\$199,999	6,650	3.2%
\$200,000+	6,607	3.2%
Median Disposable Income	\$56,643	
Average Disposable Income	\$73,598	

2010 Disposable Income by Age of Householder	Number of Households						
	<25	25-34	35-44	45-54	55-64	65-74	75+
Total	6,510	27,962	39,875	49,947	39,325	23,276	19,703
<\$15,000	1,721	2,483	1,662	2,155	2,469	3,000	4,613
\$15,000-\$24,999	930	2,462	1,779	2,474	2,360	2,664	3,326
\$25,000-\$34,999	738	3,489	3,183	3,177	3,187	3,131	2,198
\$35,000-\$49,999	815	5,846	7,319	7,538	5,389	3,873	2,743
\$50,000-\$74,999	960	7,216	11,185	11,558	8,239	4,382	2,437
\$75,000-\$99,999	480	3,495	8,183	10,443	7,168	2,170	1,268
\$100,000-\$149,999	565	2,287	4,291	8,639	7,104	2,533	2,016
\$150,000-\$199,999	88	286	1,288	2,150	1,652	689	496
\$200,000+	214	397	985	1,813	1,757	834	607
Median Disposable Income	\$32,752	\$48,926	\$60,392	\$69,222	\$67,014	\$44,962	\$33,368
Average Disposable Income	\$54,046	\$59,063	\$74,351	\$85,048	\$86,279	\$67,521	\$56,164

Data Note: Disposable Income is after-tax household income. Disposable income forecasts are based on the Current Population Survey, U.S. Census Bureau. Detail may not sum to totals due to rounding

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

January 24, 2012

Made with Esri Business Analyst



Retail MarketPlace Profile

Monroe Village CBD
60 MILLPOND PKWY, MONROE, NY, 10950
Drive Time: 7 minutes

Latitude: 41.3285
Longitude: -74.189158

Summary Demographics

2010 Population	41,101
2010 Households	10,675
2010 Median Disposable Income	\$50,808
2010 Per Capita Income	\$20,794

Industry Summary	NAICS	Demand (Retail Potential)	Supply (Retail Sales)	Retail Gap	Leakage/Surplus Factor	Number of Businesses
Total Retail Trade and Food & Drink	44-45,722	\$307,085,895	\$419,487,777	\$-112,401,882	-15.5	318
Total Retail Trade	44-45	\$261,437,483	\$388,534,783	\$-127,097,300	-19.6	238
Total Food & Drink	722	\$45,648,412	\$30,952,994	\$14,695,418	19.2	80

Industry Group	NAICS	Demand (Retail Potential)	Supply (Retail Sales)	Retail Gap	Leakage/Surplus Factor	Number of Businesses
Motor Vehicle & Parts Dealers	441	\$60,269,624	\$109,762,767	\$-49,493,143	-29.1	16
Automobile Dealers	4411	\$51,257,254	\$102,770,682	\$-51,513,428	-33.4	10
Other Motor Vehicle Dealers	4412	\$4,762,636	\$0	\$4,762,636	100.0	0
Auto Parts, Accessories & Tire Stores	4413	\$4,249,734	\$6,992,085	\$-2,742,351	-24.4	6
Furniture & Home Furnishings Stores	442	\$8,388,231	\$7,027,478	\$1,360,753	8.8	18
Furniture Stores	4421	\$5,628,109	\$1,909,021	\$3,719,087	49.3	5
Home Furnishings Stores	4422	\$2,760,122	\$5,118,457	\$-2,358,334	-29.9	13
Electronics & Appliance Stores	4431	\$7,829,705	\$10,388,091	\$-2,558,386	-14.0	20
Bldg Materials, Garden Equip. & Supply Stores	444	\$11,827,627	\$11,357,080	\$470,546	2.0	23
Bldg Material & Supplies Dealers	4441	\$10,995,951	\$10,585,638	\$410,312	1.9	18
Lawn & Garden Equip & Supply Stores	4442	\$831,676	\$771,442	\$60,234	3.8	5
Food & Beverage Stores	445	\$56,681,107	\$89,324,815	\$-32,643,708	-22.4	36
Grocery Stores	4451	\$50,495,600	\$67,405,572	\$-16,909,972	-14.3	16
Specialty Food Stores	4452	\$2,792,407	\$15,189,679	\$-12,397,272	-68.9	12
Beer, Wine & Liquor Stores	4453	\$3,393,100	\$6,729,564	\$-3,336,464	-33.0	8
Health & Personal Care Stores	446,4461	\$11,440,504	\$10,102,910	\$1,337,594	6.2	19
Gasoline Stations	447,4471	\$41,196,978	\$24,541,108	\$16,655,870	25.3	7
Clothing & Clothing Accessories Stores	448	\$13,192,240	\$10,435,120	\$2,757,120	11.7	27
Clothing Stores	4481	\$10,045,197	\$8,620,008	\$1,425,189	7.6	15
Shoe Stores	4482	\$1,636,250	\$939,534	\$696,716	27.0	5
Jewelry, Luggage & Leather Goods Stores	4483	\$1,510,793	\$875,578	\$635,215	26.6	7
Sporting Goods, Hobby, Book & Music Stores	451	\$3,162,118	\$1,388,087	\$1,774,031	39.0	15
Sporting Goods/Hobby/Musical Instr Stores	4511	\$2,211,325	\$975,201	\$1,236,125	38.8	13
Book, Periodical & Music Stores	4512	\$950,793	\$412,886	\$537,906	39.4	2
General Merchandise Stores	452	\$29,080,189	\$95,566,109	\$-66,485,920	-53.3	17
Department Stores Excluding Leased Depts.	4521	\$13,324,144	\$35,225,750	\$-21,901,606	-45.1	8
Other General Merchandise Stores	4529	\$15,756,045	\$60,340,359	\$-44,584,314	-58.6	9
Miscellaneous Store Retailers	453	\$9,700,518	\$10,479,421	\$-778,903	-3.9	36
Florists	4531	\$1,173,390	\$881,968	\$291,422	14.2	7
Office Supplies, Stationery & Gift Stores	4532	\$2,540,911	\$2,039,776	\$501,135	10.9	14
Used Merchandise Stores	4533	\$816,638	\$190,207	\$626,432	62.2	3
Other Miscellaneous Store Retailers	4539	\$5,169,579	\$7,367,471	\$-2,197,892	-17.5	12
Nonstore Retailers	454	\$8,668,643	\$8,161,797	\$506,846	3.0	4
Electronic Shopping & Mail-Order Houses	4541	\$4,023,905	\$6,560,106	\$-2,536,202	-24.0	2
Vending Machine Operators	4542	\$966,004	\$454,276	\$511,728	36.0	1
Direct Selling Establishments	4543	\$3,678,734	\$1,147,414	\$2,531,320	52.5	1
Food Services & Drinking Places	722	\$45,648,412	\$30,952,994	\$14,695,418	19.2	80
Full-Service Restaurants	7221	\$22,489,574	\$11,032,261	\$11,457,313	34.2	44
Limited-Service Eating Places	7222	\$18,706,160	\$15,946,672	\$2,759,488	8.0	27
Special Food Services	7223	\$3,781,127	\$3,492,379	\$288,748	4.0	5
Drinking Places - Alcoholic Beverages	7224	\$671,551	\$481,682	\$189,869	16.5	4

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

Source: Esri and Infogroup

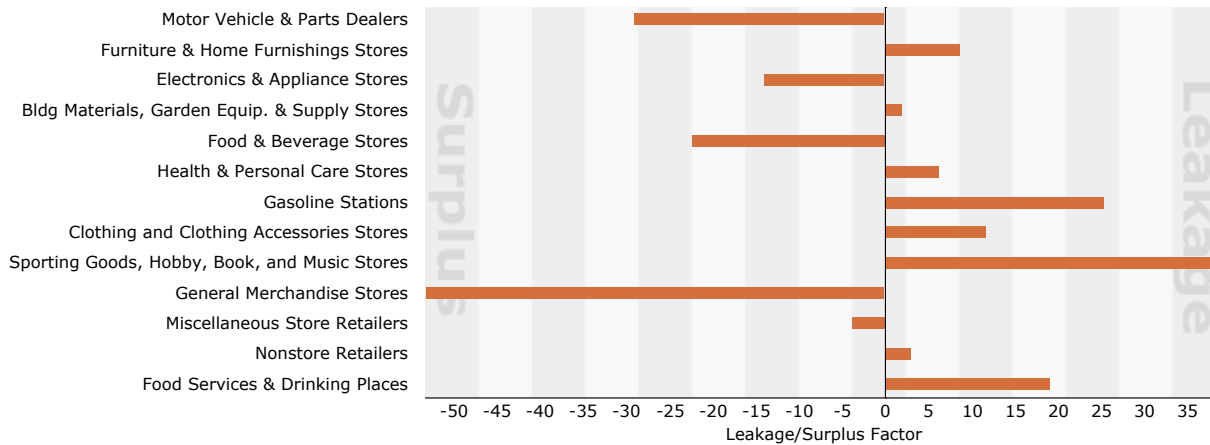
January 24, 2012

Made with Esri Business Analyst

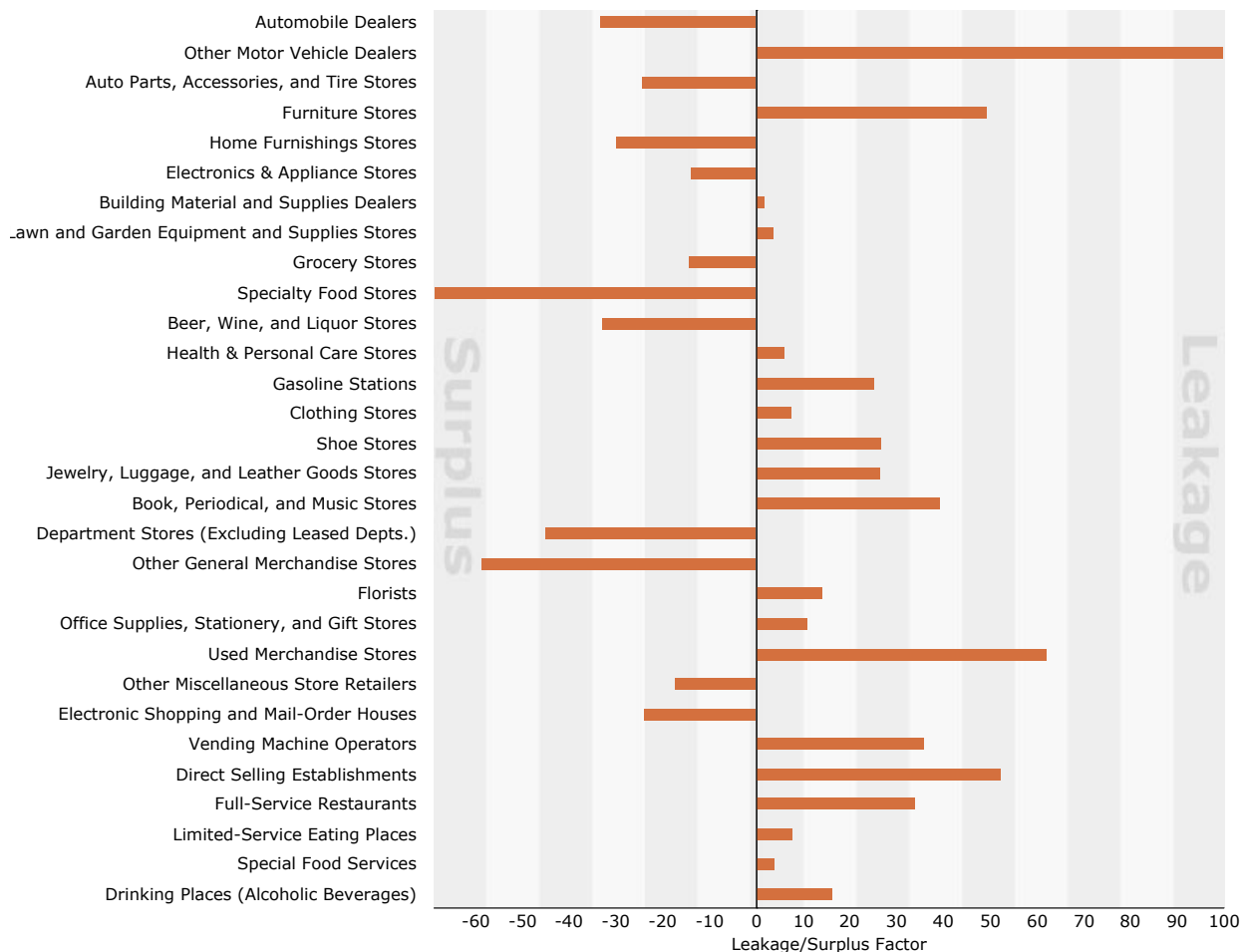
Monroe Village CBD
60 MILLPOND PKWY, MONROE, NY, 10950
Drive Time: 7 minutes

Latitude: 41.3285
Longitude: -74.189158

Leakage/Surplus Factor by Industry Subsector



Leakage/Surplus Factor by Industry Group





Retail MarketPlace Profile

Monroe Village CBD
60 MILLPOND PKWY, MONROE, NY, 10950
Drive Time: 15 minutes

Latitude: 41.3285
Longitude: -74.189158

Summary Demographics

2010 Population	82,639
2010 Households	24,441
2010 Median Disposable Income	\$57,407
2010 Per Capita Income	\$27,187

Industry Summary	NAICS	Demand (Retail Potential)	Supply (Retail Sales)	Retail Gap	Leakage/Surplus Factor	Number of Businesses
Total Retail Trade and Food & Drink	44-45,722	\$799,699,052	\$1,000,000,627	\$-200,301,575	-11.1	861
Total Retail Trade	44-45	\$681,491,621	\$911,321,084	\$-229,829,463	-14.4	658
Total Food & Drink	722	\$118,207,431	\$88,679,543	\$29,527,888	14.3	204

Industry Group	NAICS	Demand (Retail Potential)	Supply (Retail Sales)	Retail Gap	Leakage/Surplus Factor	Number of Businesses
Motor Vehicle & Parts Dealers	441	\$158,843,898	\$192,211,543	\$-33,367,646	-9.5	31
Automobile Dealers	4411	\$134,887,585	\$178,550,900	\$-43,663,315	-13.9	17
Other Motor Vehicle Dealers	4412	\$12,911,691	\$87,910	\$12,823,782	98.6	0
Auto Parts, Accessories & Tire Stores	4413	\$11,044,621	\$13,572,733	\$-2,528,112	-10.3	14
Furniture & Home Furnishings Stores	442	\$22,122,237	\$21,562,828	\$559,409	1.3	38
Furniture Stores	4421	\$14,837,811	\$10,601,151	\$4,236,659	16.7	12
Home Furnishings Stores	4422	\$7,284,426	\$10,961,676	\$-3,677,250	-20.2	26
Electronics & Appliance Stores	4431	\$20,546,670	\$16,156,407	\$4,390,263	12.0	37
Bldg Materials, Garden Equip. & Supply Stores	444	\$31,425,182	\$47,840,396	\$-16,415,214	-20.7	53
Bldg Material & Supplies Dealers	4441	\$29,189,576	\$45,610,838	\$-16,421,262	-22.0	42
Lawn & Garden Equip & Supply Stores	4442	\$2,235,606	\$2,229,559	\$6,048	0.1	11
Food & Beverage Stores	445	\$145,548,161	\$161,667,881	\$-16,119,720	-5.2	65
Grocery Stores	4451	\$129,615,230	\$133,048,748	\$-3,433,518	-1.3	30
Specialty Food Stores	4452	\$7,139,871	\$18,536,269	\$-11,396,399	-44.4	20
Beer, Wine & Liquor Stores	4453	\$8,793,061	\$10,082,864	\$-1,289,803	-6.8	15
Health & Personal Care Stores	446,4461	\$29,977,966	\$28,007,358	\$1,970,609	3.4	44
Gasoline Stations	447,4471	\$107,296,354	\$81,370,211	\$25,926,143	13.7	21
Clothing & Clothing Accessories Stores	448	\$34,153,449	\$79,101,211	\$-44,947,761	-39.7	142
Clothing Stores	4481	\$26,007,865	\$62,362,785	\$-36,354,920	-41.1	93
Shoe Stores	4482	\$4,190,061	\$12,418,400	\$-8,228,339	-49.5	24
Jewelry, Luggage & Leather Goods Stores	4483	\$3,955,524	\$4,320,025	\$-364,502	-4.4	25
Sporting Goods, Hobby, Book & Music Stores	451	\$8,271,350	\$4,512,535	\$3,758,815	29.4	30
Sporting Goods/Hobby/Musical Instr Stores	4511	\$5,798,938	\$3,382,612	\$2,416,326	26.3	24
Book, Periodical & Music Stores	4512	\$2,472,412	\$1,129,923	\$1,342,488	37.3	6
General Merchandise Stores	452	\$75,564,233	\$146,511,495	\$-70,947,262	-31.9	25
Department Stores Excluding Leased Depts.	4521	\$34,767,894	\$60,957,712	\$-26,189,818	-27.4	12
Other General Merchandise Stores	4529	\$40,796,339	\$85,553,782	\$-44,757,444	-35.4	13
Miscellaneous Store Retailers	453	\$25,371,746	\$106,784,943	\$-81,413,197	-61.6	161
Florists	4531	\$3,157,541	\$1,735,307	\$1,422,234	29.1	18
Office Supplies, Stationery & Gift Stores	4532	\$6,619,261	\$11,047,510	\$-4,428,249	-25.1	32
Used Merchandise Stores	4533	\$2,147,784	\$2,725,498	\$-577,714	-11.9	11
Other Miscellaneous Store Retailers	4539	\$13,447,159	\$91,276,628	\$-77,829,468	-74.3	100
Nonstore Retailers	454	\$22,370,376	\$25,594,276	\$-3,223,901	-6.7	9
Electronic Shopping & Mail-Order Houses	4541	\$10,514,085	\$6,809,675	\$3,704,410	21.4	2
Vending Machine Operators	4542	\$2,469,673	\$7,268,411	\$-4,798,738	-49.3	2
Direct Selling Establishments	4543	\$9,386,617	\$11,516,190	\$-2,129,573	-10.2	5
Food Services & Drinking Places	722	\$118,207,431	\$88,679,543	\$29,527,888	14.3	204
Full-Service Restaurants	7221	\$58,302,374	\$34,186,324	\$24,116,050	26.1	116
Limited-Service Eating Places	7222	\$48,395,426	\$43,547,334	\$4,848,093	5.3	66
Special Food Services	7223	\$9,781,984	\$9,652,801	\$129,183	0.7	10
Drinking Places - Alcoholic Beverages	7224	\$1,727,647	\$1,293,085	\$434,562	14.4	11

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

Source: Esri and Infogroup

January 24, 2012

Made with Esri Business Analyst

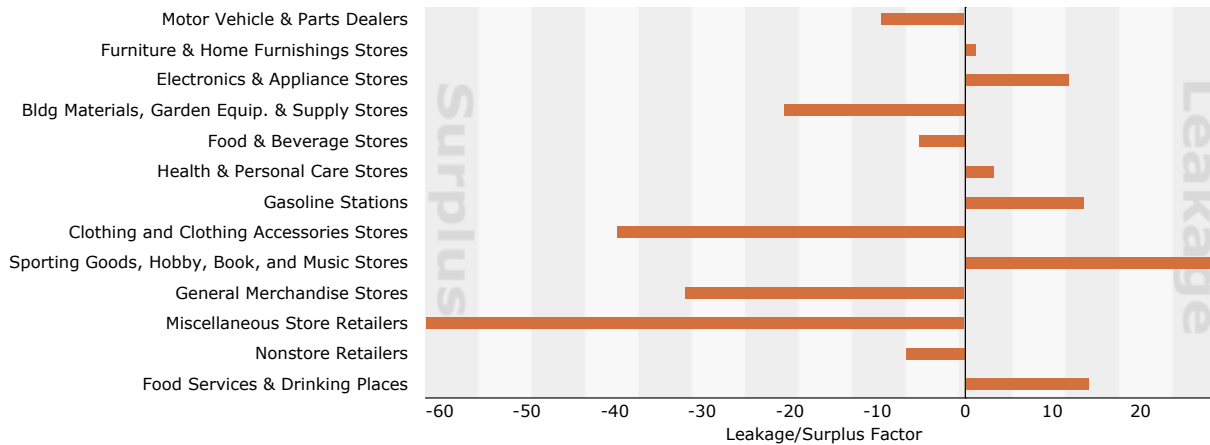


Retail MarketPlace Profile

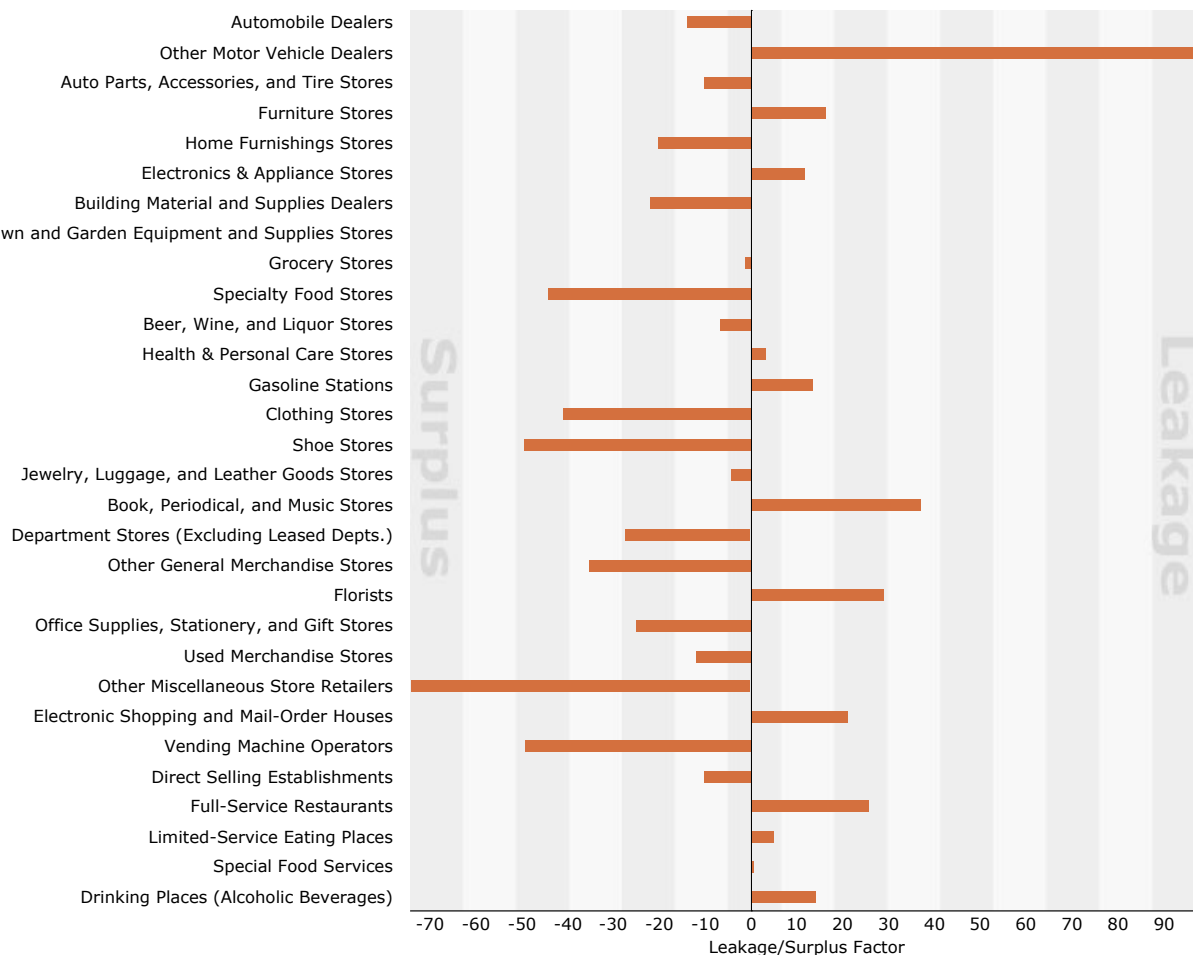
Monroe Village CBD
60 MILLPOND PKWY, MONROE, NY, 10950
Drive Time: 15 minutes

Latitude: 41.3285
Longitude: -74.189158

Leakage/Surplus Factor by Industry Subsector



Leakage/Surplus Factor by Industry Group





Retail MarketPlace Profile

Monroe Village CBD
60 MILLPOND PKWY, MONROE, NY, 10950
Drive Time: 30 minutes

Latitude: 41.3285
Longitude: -74.189158

Summary Demographics

2010 Population	621,498
2010 Households	206,598
2010 Median Disposable Income	\$56,643
2010 Per Capita Income	\$32,218

Industry Summary	NAICS	Demand (Retail Potential)	Supply (Retail Sales)	Retail Gap	Leakage/Surplus Factor	Number of Businesses
Total Retail Trade and Food & Drink	44-45,722	\$7,118,585,399	\$7,255,351,850	\$-136,766,452	-1.0	5,542
Total Retail Trade	44-45	\$6,062,722,041	\$6,449,377,379	\$-386,655,338	-3.1	3,889
Total Food & Drink	722	\$1,055,863,358	\$805,974,471	\$249,888,887	13.4	1,653

Industry Group	NAICS	Demand (Retail Potential)	Supply (Retail Sales)	Retail Gap	Leakage/Surplus Factor	Number of Businesses
Motor Vehicle & Parts Dealers	441	\$1,399,445,281	\$1,680,959,431	\$-281,514,151	-9.1	358
Automobile Dealers	4411	\$1,197,084,356	\$1,544,810,210	\$-347,725,854	-12.7	166
Other Motor Vehicle Dealers	4412	\$100,321,439	\$41,925,440	\$58,395,999	41.1	58
Auto Parts, Accessories & Tire Stores	4413	\$102,039,486	\$94,223,781	\$7,815,704	4.0	135
Furniture & Home Furnishings Stores	442	\$201,388,465	\$167,313,252	\$34,075,213	9.2	241
Furniture Stores	4421	\$117,211,122	\$105,799,356	\$11,411,766	5.1	102
Home Furnishings Stores	4422	\$84,177,343	\$61,513,896	\$22,663,447	15.6	139
Electronics & Appliance Stores	4431	\$203,550,941	\$130,850,325	\$72,700,617	21.7	257
Bldg Materials, Garden Equip. & Supply Stores	444	\$274,873,523	\$281,161,710	\$-6,288,187	-1.1	341
Bldg Material & Supplies Dealers	4441	\$252,008,526	\$264,672,544	\$-12,664,018	-2.5	272
Lawn & Garden Equip & Supply Stores	4442	\$22,864,997	\$16,489,166	\$6,375,831	16.2	69
Food & Beverage Stores	445	\$1,285,231,489	\$1,347,338,122	\$-62,106,633	-2.4	477
Grocery Stores	4451	\$1,118,165,547	\$1,187,847,444	\$-69,681,897	-3.0	233
Specialty Food Stores	4452	\$69,208,692	\$71,003,822	\$-1,795,131	-1.3	133
Beer, Wine & Liquor Stores	4453	\$97,857,250	\$88,486,856	\$9,370,394	5.0	111
Health & Personal Care Stores	446,4461	\$267,750,065	\$218,603,672	\$49,146,394	10.1	295
Gasoline Stations	447,4471	\$891,580,715	\$865,361,042	\$26,219,673	1.5	220
Clothing & Clothing Accessories Stores	448	\$316,310,061	\$199,110,465	\$117,199,595	22.7	537
Clothing Stores	4481	\$248,850,779	\$154,969,241	\$93,881,538	23.2	335
Shoe Stores	4482	\$34,512,738	\$25,769,262	\$8,743,476	14.5	66
Jewelry, Luggage & Leather Goods Stores	4483	\$32,946,544	\$18,371,962	\$14,574,582	28.4	135
Sporting Goods, Hobby, Book & Music Stores	451	\$76,787,134	\$64,929,523	\$11,857,611	8.4	242
Sporting Goods/Hobby/Musical Instr Stores	4511	\$57,018,287	\$46,952,330	\$10,065,957	9.7	187
Book, Periodical & Music Stores	4512	\$19,768,847	\$17,977,193	\$1,791,654	4.7	55
General Merchandise Stores	452	\$666,123,295	\$685,451,615	\$-19,328,320	-1.4	165
Department Stores Excluding Leased Depts.	4521	\$244,495,165	\$272,797,671	\$-28,302,507	-5.5	67
Other General Merchandise Stores	4529	\$421,628,131	\$412,653,944	\$8,974,187	1.1	98
Miscellaneous Store Retailers	453	\$178,473,695	\$243,357,826	\$-64,884,130	-15.4	690
Florists	4531	\$18,601,875	\$21,843,761	\$-3,241,887	-8.0	78
Office Supplies, Stationery & Gift Stores	4532	\$57,197,410	\$46,551,344	\$10,646,066	10.3	195
Used Merchandise Stores	4533	\$15,011,168	\$9,992,131	\$5,019,037	20.1	103
Other Miscellaneous Store Retailers	4539	\$87,663,243	\$164,970,589	\$-77,307,346	-30.6	315
Nonstore Retailers	454	\$301,207,376	\$564,940,396	\$-263,733,020	-30.4	66
Electronic Shopping & Mail-Order Houses	4541	\$157,232,436	\$401,482,572	\$-244,250,136	-43.7	14
Vending Machine Operators	4542	\$21,602,041	\$17,164,492	\$4,437,548	11.4	18
Direct Selling Establishments	4543	\$122,372,899	\$146,293,331	\$-23,920,432	-8.9	34
Food Services & Drinking Places	722	\$1,055,863,358	\$805,974,471	\$249,888,887	13.4	1,653
Full-Service Restaurants	7221	\$496,893,652	\$371,369,559	\$125,524,093	14.5	942
Limited-Service Eating Places	7222	\$432,051,265	\$355,919,887	\$76,131,377	9.7	551
Special Food Services	7223	\$112,602,642	\$67,658,751	\$44,943,891	24.9	83
Drinking Places - Alcoholic Beverages	7224	\$14,315,800	\$11,026,274	\$3,289,525	13.0	77

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

Source: Esri and Infogroup

January 24, 2012

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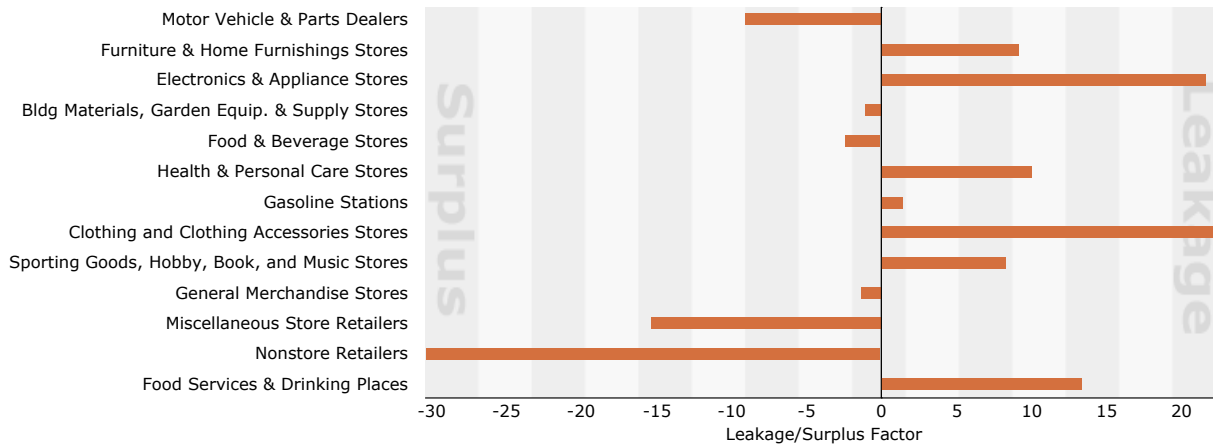


Retail MarketPlace Profile

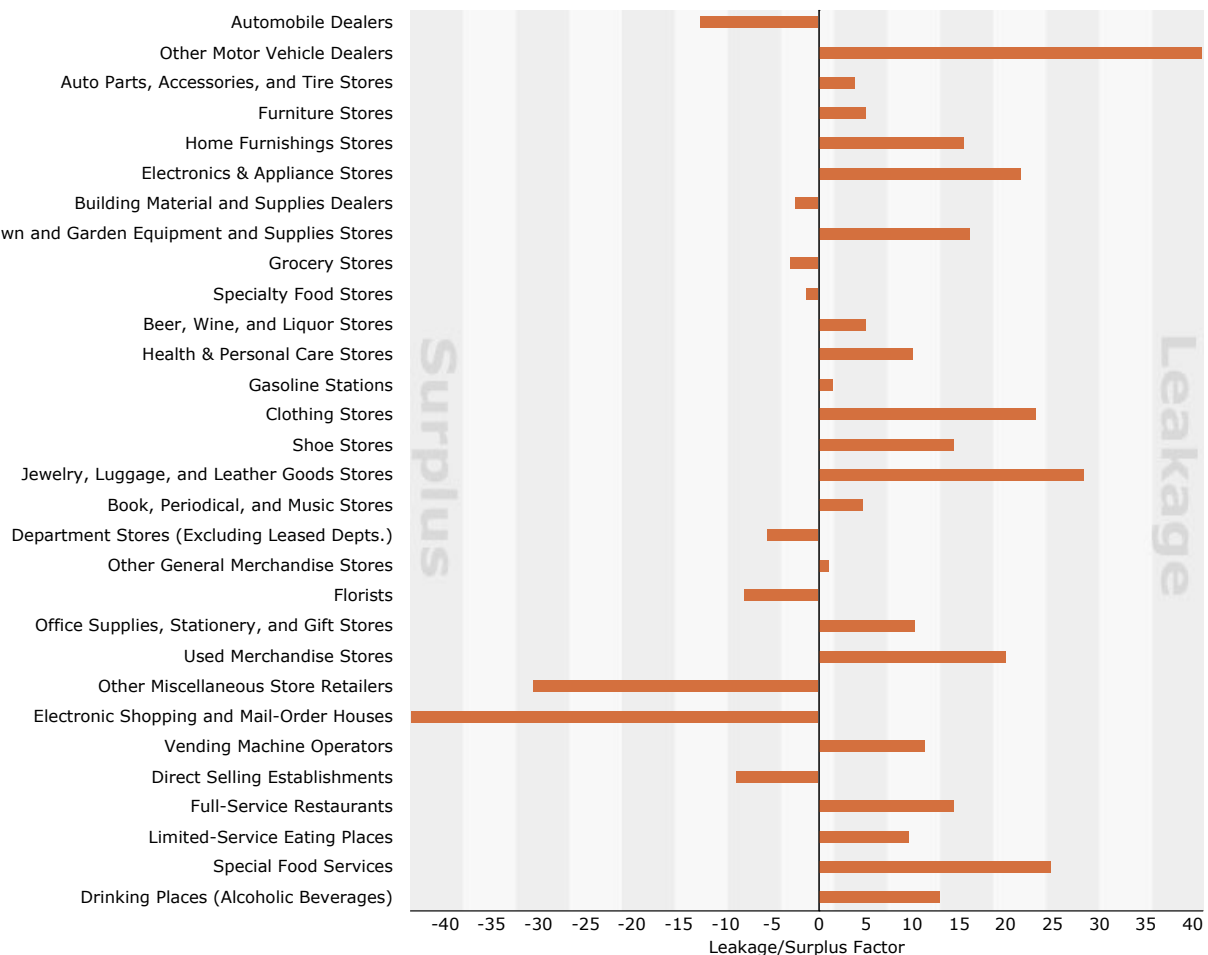
Monroe Village CBD
60 MILLPOND PKWY, MONROE, NY, 10950
Drive Time: 30 minutes

Latitude: 41.3285
Longitude: -74.189158

Leakage/Surplus Factor by Industry Subsector



Leakage/Surplus Factor by Industry Group



Source: Esri and Infogroup

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