

---

EXPANDED MARKET AND ECONOMIC DEVELOPMENT ANALYSIS

# WEST SIDE GREENVILLE

GREENVILLE, SOUTH CAROLINA

MAY 2014

---

PREPARED BY

Robert M. Lewis, AICP, CEcD

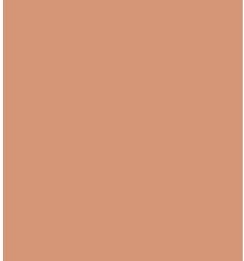
Yash Yedavalli

Claire Lucas



**DEVELOPMENT STRATEGIES®**

guiding effective decisions in  
real estate, community, and economic development





**Contents**

INTRODUCTION..... 1

    SUMMARY OF RECOMMENDATIONS.....1

        Demographics.....1

LOCATION MAPS.....2

    Economic Sectors .....4

    Geographic Priorities .....4

    Grocery Stores .....4

DEMOGRAPHIC SEGMENTATION ANALYSIS ..... 6

    WEST SIDE NEIGHBORHOOD GROUPS.....6

    CITY OF GREENVILLE GROUPS .....7

    GREENVILLE COUNTY GROUPS .....8

    RECOMMENDED ACTIONS.....9

ECONOMIC SECTOR ANALYSIS ..... 11

GEOGRAPHIC AREA ANALYSIS ..... 15

    SUSTAINING THE PENDLETON STREET ARTS DISTRICT..... 16

        Case Study: Art Loft Apartments – St. Louis, Missouri..... 17

        Case Study: Lowertown District – Paducah, Kentucky..... 18

FOCUS ON GROCERY STORES ..... 20

    THE WEST SIDE IS MOSTLY A FOOD DESERT..... 20

    MAKING THE CASE FOR NEW GROCERY STORE(S) IN THE WEST SIDE ..... 23

    PARTNERSHIPS TO ACHIEVE GROCERY STORES ..... 26

        Case Study: Hospital Hill Grocery Store in Kansas City, Missouri..... 27

Appendix A: Retail Market Profile Data for Pete Hollis Boulevard Grocery Site

Appendix B: Retail Market Profile Data for Pendleton Street Grocery Site

Separate Document: Tapestry™ Segmentation Reference Guide



## INTRODUCTION

The West Side neighborhoods of Greenville completed a comprehensive plan in late 2013 to improve and capture growth and prosperity over the next decade. Part of that process involved a broad economic development overview by Development Strategies, one of the planning consultants on the larger team led by the Lawrence Group that assisted in the plan's creation.

Subsequently, the City of Greenville re-commissioned Development Strategies to look deeper into some specific demographic and economic topics to aid in implementation of some components of the comprehensive plan. This report looks at four major topics in that regard:

1. A closer look at the demographic make-up of the West Side to determine opportunities for expanding the population and increasing its diversity.
2. A refined and updated review of economic development growth sectors that the West Side might capitalize upon to attract business and job growth.
3. A little closer look at a few growth corridors in the West Side with particular attention to sustaining the Pendleton Street Arts District.
4. Determining if and how more grocery store and fresh food options can be attracted to the West Side.

A note on geography. The next page shows the geographic “bubble” (bold yellow line) that was generally used in obtaining and downloading data that could be isolated to this non-standard geo-

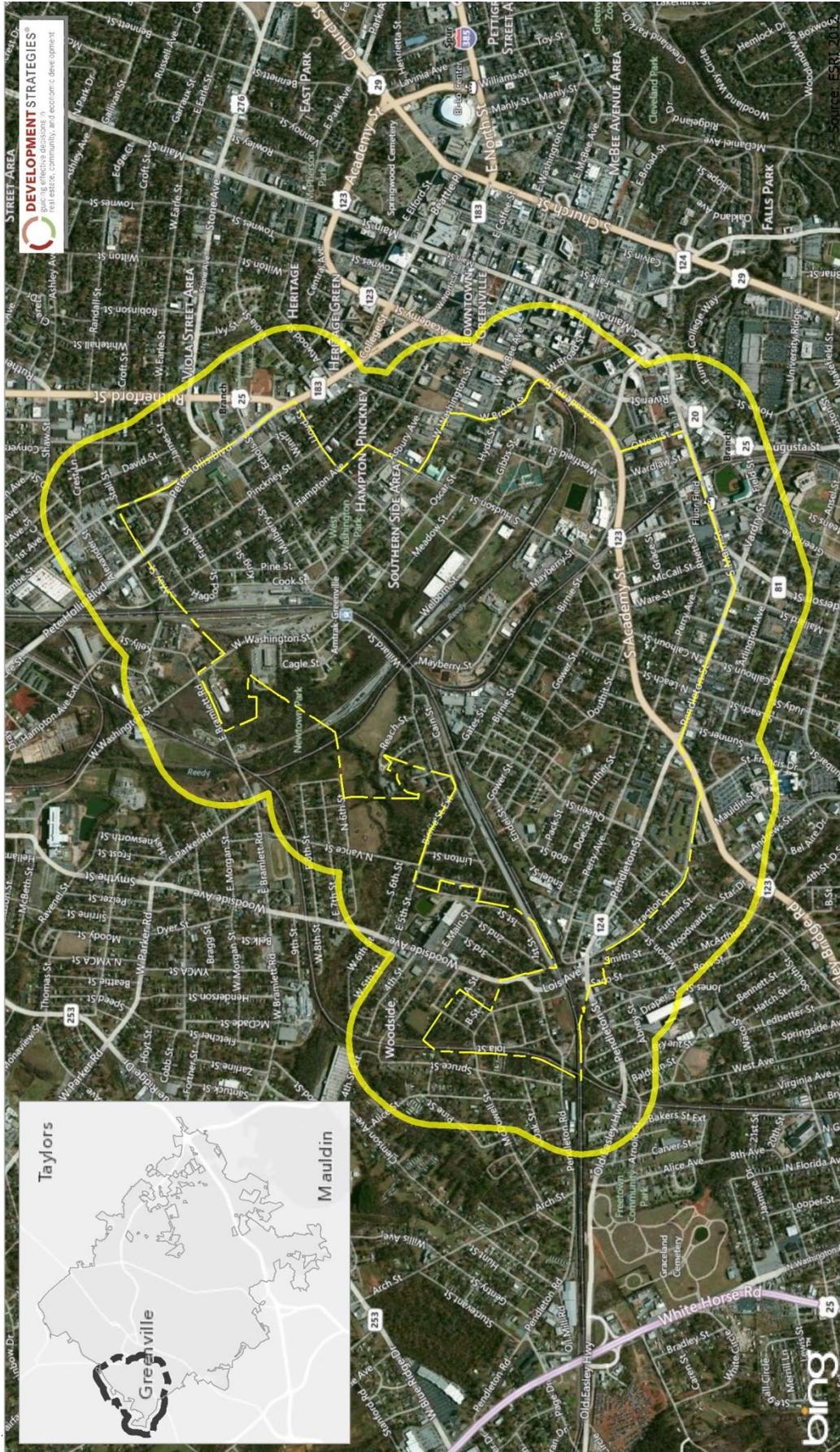
graphic area. The bubble purposely includes areas that surround the three defined West Side neighborhoods (dashed yellow line) so that a fuller context of data informs the opportunities and challenges within the West Side. The subsequent page details the three specific neighborhoods that comprise the West Side. The lavender “edges” of the West Side correspond to the complete study area which extends beyond the neighborhoods and sometimes beyond the city limits.

## SUMMARY OF RECOMMENDATIONS

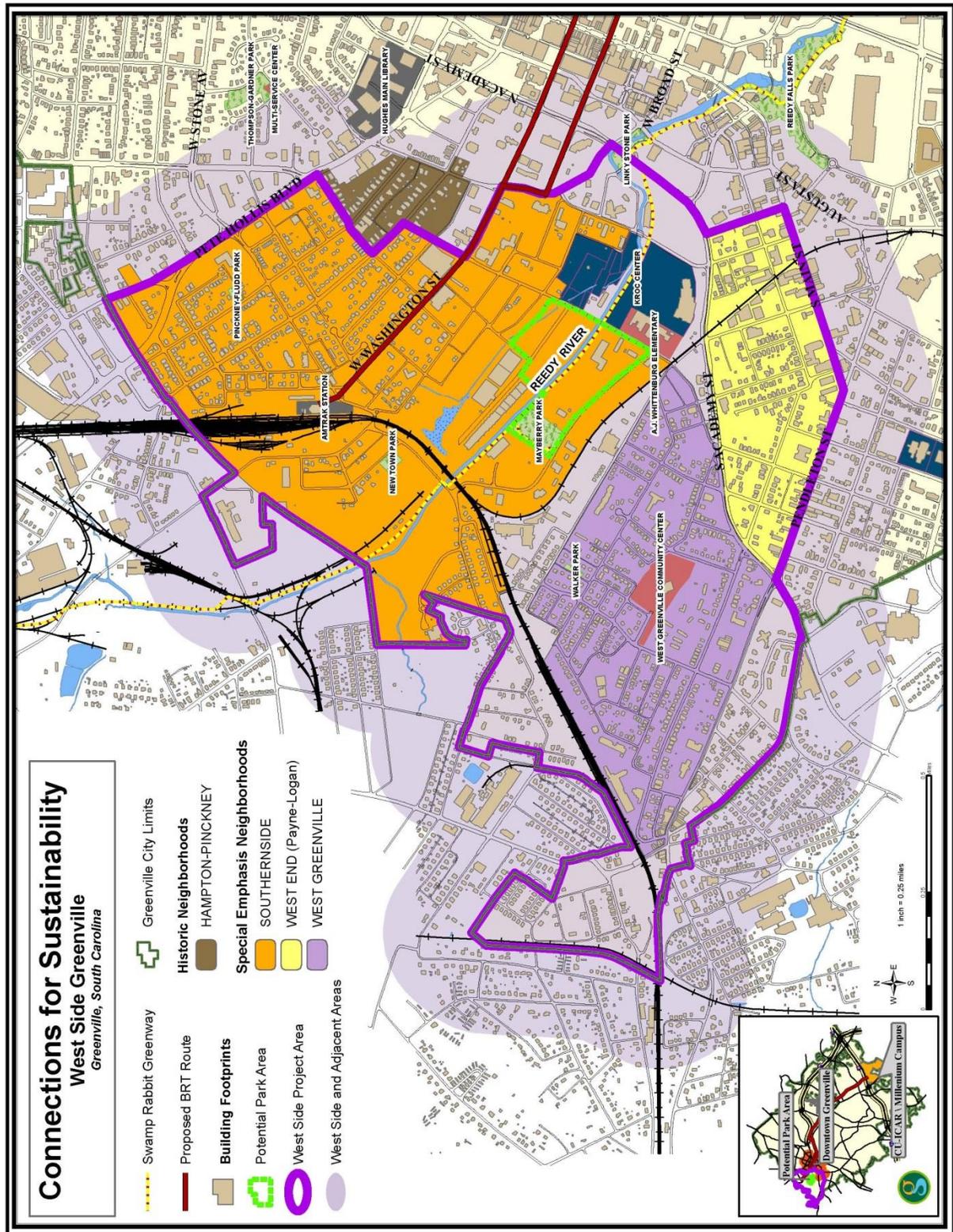
### Demographics

The West Side has a relatively undiversified population when compared to Greenville City and County. Of 65 Community Tapestry demographic groups in the United States, eight are present in the West Side, 23 are found in the City of Greenville, and a very impressive 44 are found throughout Greenville County.

In light of ongoing population and housing growth in the city and the density of population and jobs in the greater downtown area, it is recommended that city officials identify means to attract more of the county's diversity into the city and, more specifically, into the West Side. Land is available in the West Side, although some larger tracts need to be assembled to encourage larger housing developments. But growth of the metro area is happening and the West Side should try to be part of that growth and increasing prosperity.



**LOCATION MAP**  
West Side of Greenville, South Carolina



## **Economic Sectors**

National job projections have been altered downward since the West Side Comprehensive Plan was completed, so economic growth in the U.S, and perhaps South Carolina, will be a bit more sluggish than earlier projected. That said, South Carolina officials have yet to re-adjust office economic projections for the state in light of the new (December 2013) projections for the nation.

But it is clear that three major economic sectors will continue to dominate net job creation. The West Side is poised to exploit all three: back office administrative jobs; professional, technical, and scientific jobs; and health care and social assistance jobs. Most of the employers in these sectors require office and/or low intensity buildings and facilities, which can fit quite well into the mixed-use residential character of much of the West Side. Moreover, these are sectors that already have high job counts in the “greater West Side” area than encompasses downtown and even St. Francis Hospital. City officials should be pursuing a business retention and attraction program along with land assembly to assure that the West Side can compete for these jobs. Residents of the West Side should also be enabled to more readily achieve appropriate career training in many of these jobs.

## **Geographic Priorities**

It is very clear from conversations with a number of stakeholders that there are essentially four key corridors in the West Side that should be focused on for economic development: Pete Hollis

Boulevard, West Washington Street, South Main (though this is already achieving much development), and Pendleton Street to and through the Arts District, ideally encompassing one or both “mill villages” in that area. More intense development in these corridors will catalyze market-based responses for housing and support economic development in the interior of the West Side.

Of particular importance in this study is the sustainability of the Pendleton Street Arts District. Artists often lead the way in urban revitalization, but their “business models” often do not enable them to pay the inevitably higher real estate costs when market demand catches up to their locations. While the geographic areas that the artists have to vacate are usually self-sustaining for other purposes (housing, entertainment, dining, retail, small businesses, etc.), there is a desire in Greenville to keep the artists in place as part of the eclectic sensation of the Arts District. The primary recommendation herein is to find affordable ways to help the artists, themselves, be the real estate investors (buyers and owners) so that they become more rooted in the area and can benefit from future value/rent increases. The Lowertown Artist Relocation Program in Paducah, Kentucky, is recommended as a serious model for emulation.

## **Grocery Stores**

Most of the West Side is considered a “food desert” by federal guidelines. Part of this designation comes from being a lower-income community, but it also comes from not having good grocery stores conveniently located in or near the area. This doesn’t mean that West Side residents

don't buy groceries. They just spend their grocery money outside of the West Side as well as in local stores that have a very limited line of grocery store items—and almost never fresh produce or meats.

This report makes a case that two smaller, urban-scale grocery stores could be located in the West Side (recommendations are on Pete Hollis and on Pendleton) without seriously disrupting the supply-demand balance in the broader marketplace. The recommendation is to utilize a public-private partnership with a retail developer to create the stores using certain incentives and attracting high quality grocery operators. There would be some geographic “shift” in where local customers spend their grocery dollars, but there is ample room in the market to absorb this shift into the West Side. A key issue for public officials, however, is whether the effort and incentives necessary to overcome inevitable reluctance on the part of the grocery

industry to locate in the West Side are worth the longer term improvement in the quality of life of the West Side and, indeed, of a large market area encompassing areas to the north, east, and south.

In summary, the West Side is superbly located for substantial demographic, economic, and social changes that will improve its urban conditions. Many of these forces are already at work, particularly in the West End neighborhood. As these local forces grow with Greenville's ongoing growth, interests in the West Side are better served by managing, directing, and negotiating that growth for the betterment of current residents and businesses rather than allowing market forces to play out more naturally.

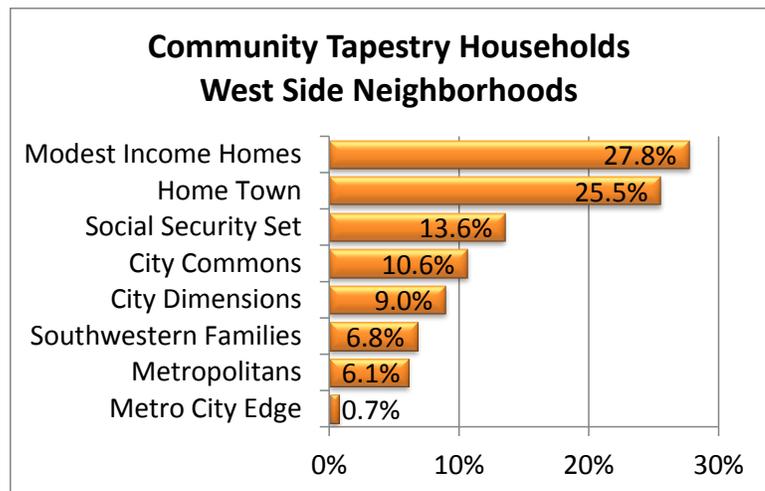
## DEMOGRAPHIC SEGMENTATION ANALYSIS

Businesses engaged in market research and analysis often divide Americans into relatively homogeneous population groups, or segments, in order to facilitate advertising, marketing, and simply a better understanding of the composition of the public. These demographic descriptions are also very helpful for city planning and community development as a basis for understanding major characteristics of a local population. Development Strategies subscribes to the segmentation database of the demographic vendor, Esri. Esri’s database is called Community Tapestry® and it divides American households into 65 groups based on a wide range of census-type demographic statistics.

No community in the United States has all 65 groups.<sup>1</sup> New York City, for example, is one of the most demographically diverse places in the world, but it won’t have households in the *Pacific Heights* group because all members of that group live along the Pacific Ocean. But diverse communities contain a great many Tapestry groups nonetheless. Greenville County, as it turns out, is one of those very diverse places with 44 of the 65 groups. More on that later.

### WEST SIDE NEIGHBORHOOD GROUPS

Of the 65 groups, the West Side neighborhoods encompass only eight, as shown on the accompanying graph. This suggests that the West Side might be fertile ground for attracting more demographic groups as the neighborhoods change in response to downtown economic forces and improvements triggered by flood control, new park and recreation facilities, and stabilization of the Pendleton Street Arts District.



Over half of the West Side households are in two groups:

#### **Modest Income Homes** (27.8% of the West Side)



Eighty-three percent of the residents in *Modest Income Homes* neighborhoods are black. Single-person and single-parent household types are predominant; however, a higher-than-average proportion of other family households is also present. The median age of 36 years

<sup>1</sup> Descriptions of all 65 groups are contained in a separate document provided with this report.

is a year younger than the national median of 37. Many adult children in this group still live at home. More than one-fourth are aged 65 years or older and have retired. Many are caregivers for their grandchildren, demonstrating strong family ties in these neighborhoods.

**Home Town** (25.5% of the West Side)

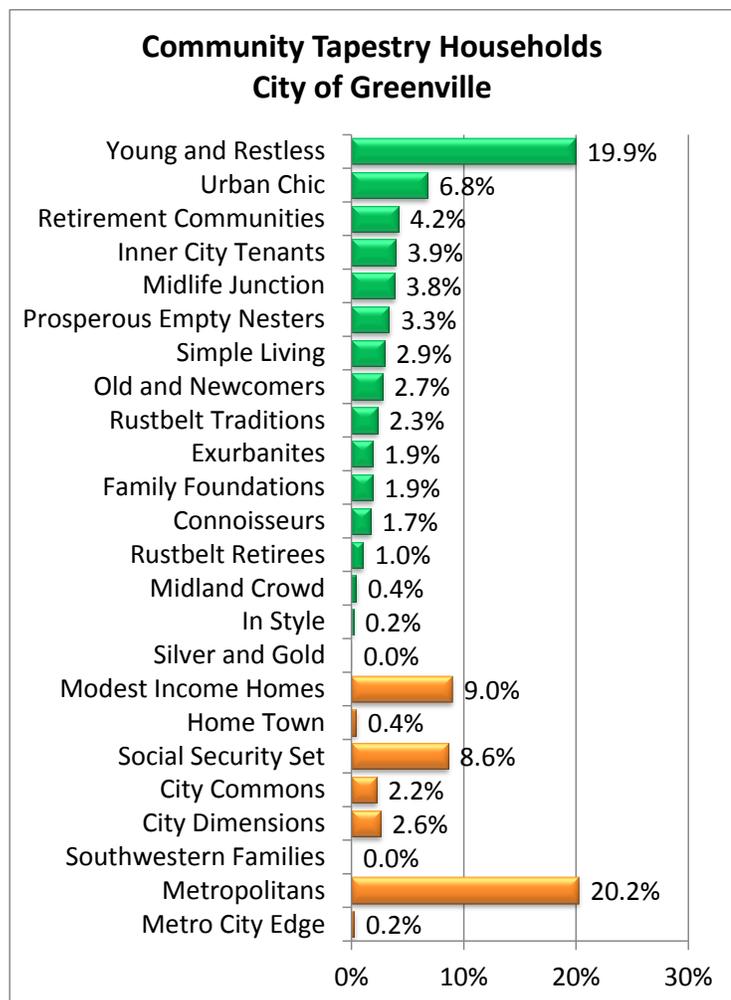


*Home Town households* are a mix of married-couple families, singles who live alone, and single-parent families. With a median age of 34.5 years, this is a slightly younger market than the United States as a whole. However, one in three is aged 65 years or older. Many families encompass two generations who have lived and worked in the community; their children plan to do the same. Seventy-two percent of the residents are white; 15 percent are black.

**CITY OF GREENVILLE GROUPS**

In an important contrast, the City of Greenville encompasses 23 of the 65 Community Tapestry groups, an indication that the city is a relatively diverse mix of a wide range of household types. The graph to the right lists all of these 23 groups on the same percentage scale as shown above for the West Side alone. The West Side groups continue to be shown in orange at the bottom of the graph.

The percentages for the groups in the West Side have been reduced to show their shares within the entire city. Note, however, that one of those West Side groups—*Southwestern Families*—has no presence within the city of Greenville. This is because the study area for the West Side extends outside of the city limits. The *Southwestern Families* group is found entirely outside of the city limits at present. That is, *Southwestern Families* are found in the study area but, because they are not technically in the city limits, they are excluded from the city analysis.



The two leading demographic groups for the city as a whole are described below. Note that the first one, *Young and Restless*, is not found in the West Side, but the second largest city group, *Metropolitans*, is found in relatively modest amounts in the West Side. When accounting for the entire city, however, there is a very substantial presence of *Metropolitans* households.

**Young and Restless** (19.9% of Greenville, 0% of West Side)



Change is the constant for *Young and Restless* households. This young, on-the-go population has a median age of 28.6 years. Approximately two-thirds of them are younger than 35. Fifty-eight percent of these households are either single person or shared. Neighborhoods are diverse. Fifty-six percent of the residents are white; however, above-average shares of blacks, Hispanics, and Asians also live in these neighborhoods.

**Metropolitans** (20.2% of Greenville, 6.1% of West Side)



Residents of *Metropolitans* communities prefer to live in older city neighborhoods. Approximately half of these households are singles who live alone or with others; 40 percent are married-couple families. One in four of the residents is aged 20–34 years; the median age is 37.7 years. Diversity is low; most of the population is white.

## GREENVILLE COUNTY GROUPS

If the City of Greenville is relatively diverse, Greenville County (as a whole) is cosmopolitan. The county encompasses 44 of the 65 Community Tapestry groups, a clear indication that Greenville is home to a great range of populations. The graph to the right lists all of these 44 groups on the same percentage scale as shown on the previous two graphs. The West Side groups continue to be shown in orange at the bottom of the graph while the City of Greenville groups are in green. The red bars represent groups found in the county but not in the city, other than *Southwestern Families* which are in the West Side but not in the city.

The two leading demographic groups for the county as a whole are described below. Note that each is a leading national Tapestry group—one for the largest number of households, the other as second fastest growing.

**Midland Crowd** (12.1% of County, 0.4% of City, 0% of West Side)



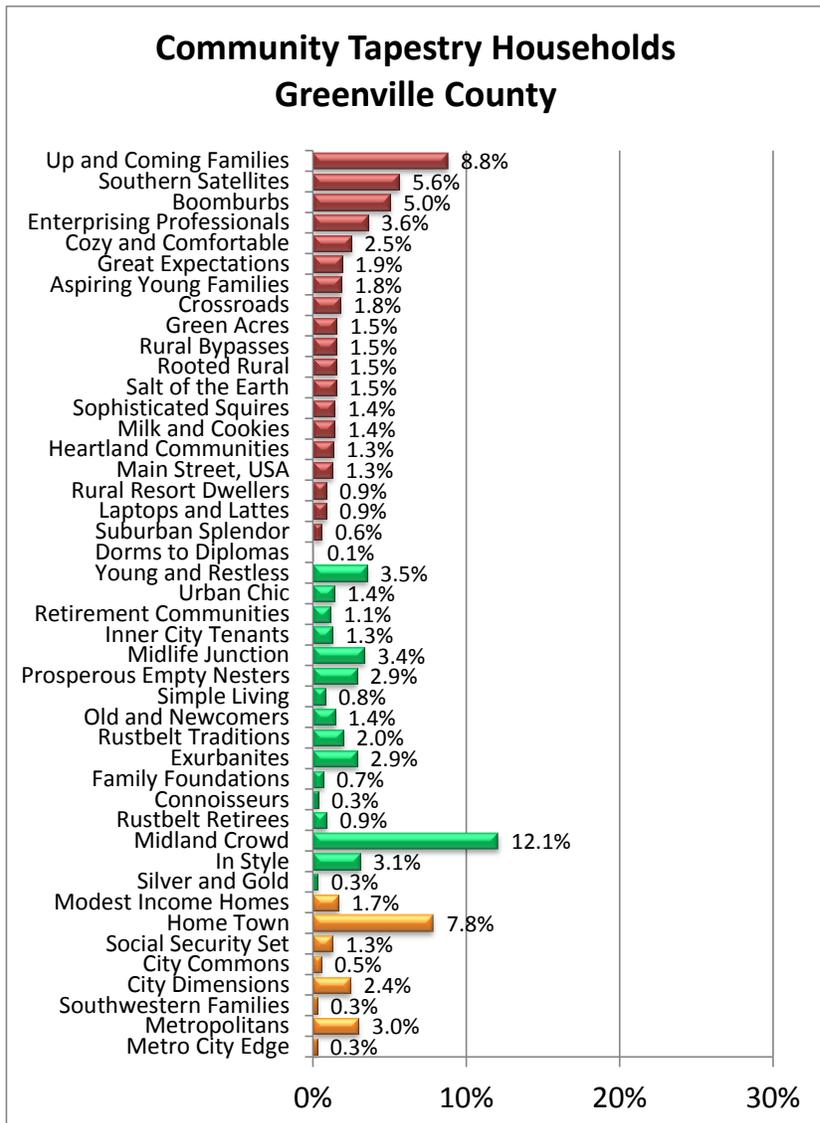
The growing national population of 12 million, approximately 4 percent of all US residents, identifies *Midland Crowd* as **Tapestry Segmentation's largest segment overall**. Since 2000, its US population has grown by 2.2 percent annually. The median age of 37.2 years parallels that of the U.S. median. Sixty-two percent of the households are married couple families; half of them have children at home. Twenty percent of the households are singles who live alone. *Midland Crowd* neighborhoods are not considered demographically diverse in and of themselves.

**Up and Coming Families** (8.8% of County, 0% of City, 0% of West Side)



With a national household growth rate of 4½ percent per

year, *Up and Coming Families* represents Tapestry Segmentation’s second fastest household growth market. A mix of Generation Xers and Baby Boomers with a median age of 31.9 years, this segment is the youngest of Tapestry Segmentation’s affluent family markets (one of several “groups of groups”). Residents of these neighborhoods are young, affluent families with younger children. Eighty percent of the households are families—that is, households of multiple members related by blood or marriage. Most of the residents are white; however, diversity is increasing as the segment grows.



The third largest group in all of Greenville County is the second largest group in the West Side—*Home Town*. Clearly, the West Side is a significant contributor to the important diversity of both the city and county.

**RECOMMENDED ACTIONS**

1. Promote the variety of people residing in “greater Greenville” to the world. Capitalize on the region’s international stature as a highly diversified population.
2. Build on the national forces favoring urban living and interesting places for work, recreation, and shopping to expand the diversification of the City of Greenville itself. Promote higher density housing developments to attract a wider range of population segments that favor urban settings but who are now having to settle for suburban locations.

3. Include much of the West Side in these efforts. Identify and promote higher density housing sites in the West Side, both to capitalize on the region's diversification and to stimulate development and property value increases in the West Side.

### ECONOMIC SECTOR ANALYSIS

Recent releases of key national economic projections show that there is consensus that the American economy is going to grow more sluggishly through 2022 than earlier projections had thought. This may have implications on the pace of economic development in Greenville and the West Side.

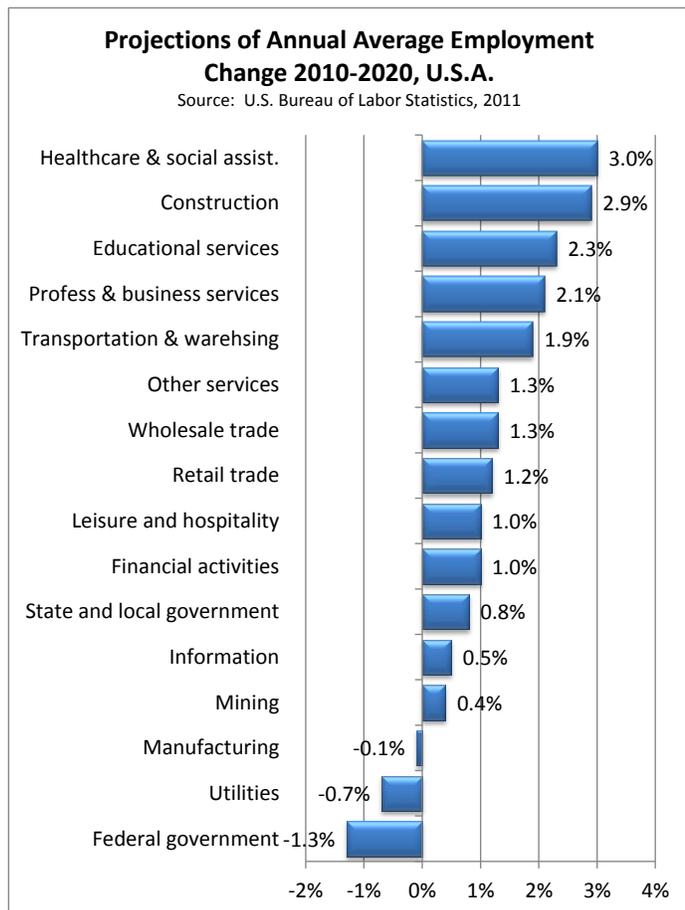
The economic sector analysis conducted during the planning process for the West Side Comprehensive Plan in the summer of 2013 relied upon data primarily based on federal statistics and projections published in 2011 and 2012. There are often notable time lags in economic databases because of the complexity in assuring that the data are accurate and reflect all segments of the economy. Moreover, state governments rely on the federal statistics to develop many of their own databases, so the state data can often show even more time lags.

In the end, the trends and forces demonstrated by these databases are very useful for understanding local and regional economies and for developing policy responses to challenges in these economies. While there is a time lag, there are always “leading indicators” and “current data” which help to understand current conditions, but these often change as more and more data are collected and analyzed over time.

National projections of employment are often the most significant indicators of consensus among economists and policy makers about the future of the country’s economic growth. In the summer of 2013, the West Side Comprehensive Plan utilized the accompanying graph to demonstrate projected rates of job growth in the nation by major economic sector. These projections, first published in late 2011 to reflect expected job changes between 2010 and 2020, show growth (and some declines) by sector.

Changes ranged from an anticipated 1.3 percent compounded annual average *decline* in federal government jobs (contrasting with a 0.8 percent compounded average annual *increase* in state and local government jobs) to a 3.0 percent compounded annual average *growth* in healthcare and social assistance jobs.

Overall, jobs in the U.S. were projected to increase at a compounded average annual rate of



1.3 percent between 2010 and 2020.

New projections from the U.S. Department of Labor, Bureau of Labor Statistics, now anticipate national job growth to average just 1.0 percent per year on a compounded basis. These projections, for the ten-year period of 2012 through 2022, were published in December 2013, and are summarized on the graph to the right.

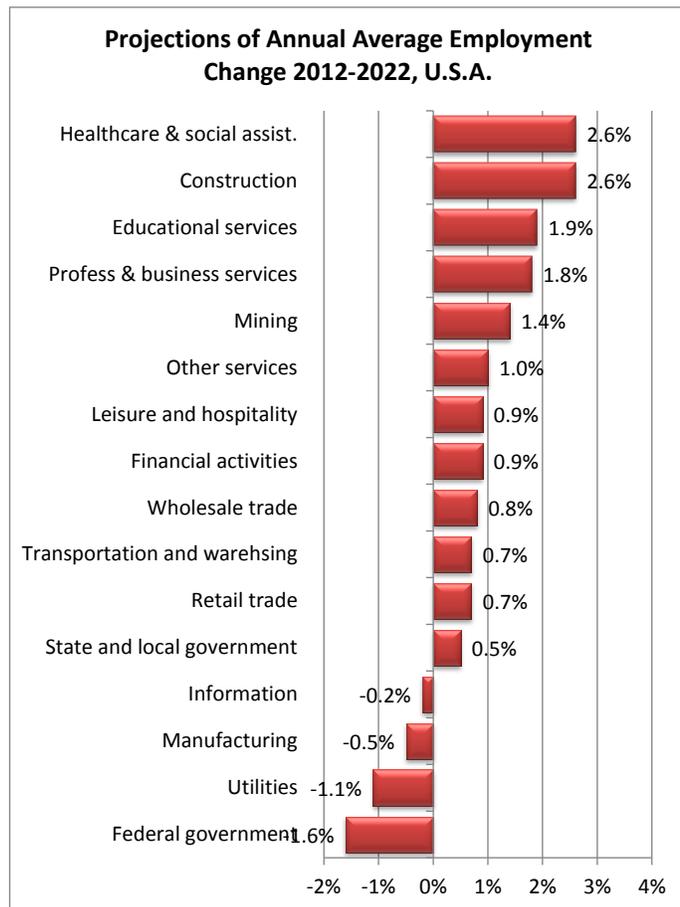
Notable is that the federal government job numbers will still decline faster than other sectors, at a rate of -1.6 percent per year, a more rapid rate than had been projected two years earlier.<sup>2</sup> Meanwhile, healthcare and social assistance jobs will still lead all other sectors in rate of growth, but at 2.6 percent per year instead of the earlier projected 3.0 percent per year.

In fact, of the 16 major economic sectors shown on the graph, 15 are now projected to grow more slowly than their projections from

two years ago. Only the mining sector is projected to add jobs more quickly than was anticipated in the earlier forecast—1.4 percent on a compound annual average basis compared to the earlier 0.4 percent annual growth. On a national basis, this more aggressive adjustment for the mining sector is a reflection of the natural gas and related drilling/mining operations taking place particularly in western states on a scale not earlier expected. But mining represents only 0.6 percent of all jobs in the American economy, so its catalytic impact is minimal.

In short, economic recovery from the recent Great Recession is projected to remain sluggish throughout the United States.

Until South Carolina updates its own projections based on the new national outlook, previous projections must be relied upon for insight into opportunities for Greenville and the West Side. Depicted on the next



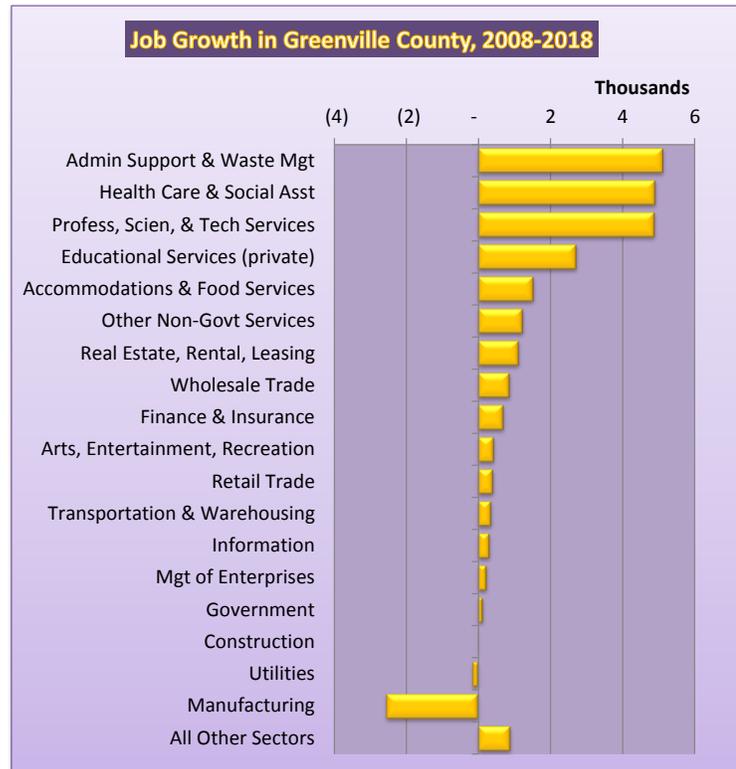
<sup>2</sup> Most of these federal job projections are based on analysis of upcoming federal budget proposals.

graph are projections for jobs by sector in Greenville County as determined in 2012 by the South Carolina Department of Employment and Workforce.

In essence, South Carolina economists, in their analysis and projections, expected Greenville County to be a strong market for jobs in *administrative support and waste management, health care and social assistance, and professional, scientific, and technical services*. On the other hand, *manufacturing* jobs were projected to decline rather substantially in the county, a pattern that remains consistent at the national level, so probably will remain true Greenville County when the projections are revised during 2014.

How might these growth sectors affect economic development in the West Side? Given the three fastest growing sectors in Greenville County, the effect can potentially be quite substantial.

- The *administrative support* sector (ignoring for now the waste management component) is a major user of office space. The West Side’s location next



to downtown Greenville suggests that the West Side could be a lower cost real estate alternative for certain back office functions of downtown businesses, or businesses that prefer a near-downtown location but cannot quite afford downtown rents. These back offices are typically dominated by administrative support kinds of occupations. Moreover, a great deal of the West Side labor force is less educated than the general Greenville population, and administrative support positions most often do not require college educations. Thus, there may be notable opportunities to locate more jobs closer to the homes of the labor force.

- Not dissimilarly, the *professional, scientific, and technical* (PST) services sector is very office-oriented, especially for firms in consulting services and firms that otherwise provide support services to office-based firms. Again, the adjacency to downtown suggests tangible opportunities for the West Side to capture a number of PST firms. Moreover, the workforce generally employed in PST firms prefers urban places like downtown Greenville and much of West Greenville.
- The *health care and social assistance* sector can also be lucrative for the West Side, if not for actual placement of firms, then for employment of West Side residents. Bon Secours St. Francis Health System, for in-

stance, has a major presence in the immediate area with their main campus “St. Francis Downtown.”

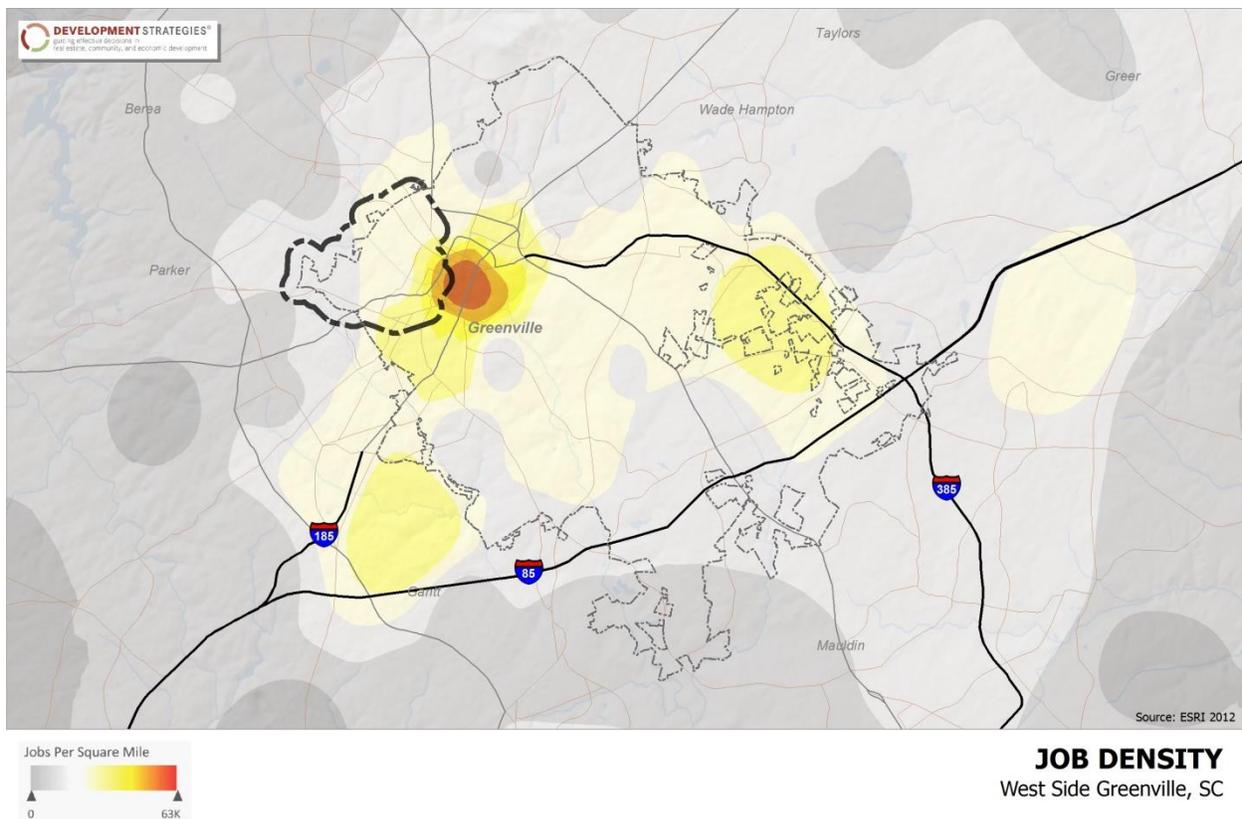
With growth of this sector, more jobs close to the West Side will be created, many of which do not require college degrees, although a great many do, but they will require some amount of post-high school intensive training.

With these three sectors alone that already have substantial numbers of jobs in the Downtown/West Side area, a targeted economic development strategy is recommended to assure (1) that West Side residents know about and are trained for growth sector employment opportunities and (2) that the West Side captures firms that are in these sectors—while not ignoring other sectors, of course.

1. Take all reasonable steps to attract training facilities and/or post-secondary trainers and educators to the West Side, or even Downtown, to increase the convenience for West Side residents needing upgrades and changes in employable skills. A corollary solution is to subsidize transportation to and from the West Side for residents enrolled in training courses located elsewhere in the City and County.
2. Undertake a “business retention and expansion” program (BR&E) in the greater downtown area (including St. Francis) to determine growth needs (space and employees) of existing businesses in at least the three major sectors described above. A purpose will be to assure that City officials understand the needs of these employers and responds to those needs, but also to expose those firms to the labor force of the West Side.
3. Continue to market the greater Downtown area, including extensions into the West Side (e.g., South Main/Pendleton, West Washington, and Pete Hollis) to business firms needing space for the three sectors (and others) described above.
4. Continue to encourage a more diversified housing stock in the West Side that appeals to the diversity of jobs and job holders in these three major sectors. Encourage housing growth to attract workers in a wide range of price points and housing products that help to minimize commuting times, increase urban density and mixed-income communities, and generally improve the land use sustainability of the West Side in conjunction with Downtown.

## GEOGRAPHIC AREA ANALYSIS

A fascinating pattern on the following map is the importance of the major highway network in determining where the greatest job concentrations are found in the Greenville region. The darker dashed-line polygon to the left is the West Side study area, adjacent to the region's highest concentration of jobs in Downtown Greenville. The other two major concentrations, though not as dense as downtown, are effectively found where the Interstate highways connect with one another. While Downtown itself does not technically have an Interstate Highway running through it, the Interstate system leads right to Downtown ("all roads lead to Rome"), creating a third point on the Greenville highway network "triangle." The lesson is to recognize the importance of the highway network for economic development as that network is used for employee commuting and distribution of goods.



The West Side obviously is well placed in this pattern to absorb more job growth, if not also a more diverse set of urban land uses. The downtown density of jobs, as the map shows, is already fairly high. This is causing property values and rents to rise, which encourages some development to spread outward from downtown, some of it already happening in selected parts of the West Side particularly in the West End neighborhood. Given available land, redevelopment sites, and accessibility in the West Side, more such development and redevelopment should be encouraged.

During the planning process of 2013 for the West Side Comprehensive Plan, it became very clear that four corridors of development into the West Side are preferred for different reasons. These preferences were reinforced during roundtable discussions in February 2014 for this expanded market study.

- **Pete Hollis Boulevard** is a major commuting corridor. One could argue that it is too wide to be appropriately compatible with West Side and Downtown development, but it nevertheless provides convenient access to distant locations but also to sites on the north edge of the West Side study area. The key site in this respect is represented by the former Green Plaza shopping center with land development potential extending eastward to the Kash & Karry store. This much available land in the growing greater Downtown area should have significant value for attracting higher value uses, including higher density housing.
- **West Washington Street** is somewhat truncated at its west end, but is a natural extension for larger scale commercial uses, and maybe housing, from Downtown. Moreover, it is under consideration for improved transit services. Sites on West Washington closest to Downtown are already dominated by large buildings, so expansion of larger scale development in that segment would be consistent. There is also ample land along West Washington at its western terminus, though lower density housing in much of that area might preclude intense commercial uses. But low intensity commercial buildings (say, no more than two stories) that generate little vehicular traffic and contain relatively quiet and clean operations would be appropriate. Consideration should be seriously given to re-purposing of the Post Office building and/or site and to changing the decision to locate city public works facilities in this corridor. That said, the Post Office has been there a long time, so there is no need to relocate it if the Postal Service remains happy with the location.
- **South Main Street** is the southern edge of the West End neighborhood and, for most intents and purposes, is already experiencing substantial redevelopment and revitalization. This robustness is apparent not only on South Main, but also in the two-to-three blocks toward South Academy Street with many new apartments, retail shops, and the like. It is not difficult to envision further market-generated changes in the West End that probably do not require substantial public incentives.
- **Pendleton Street** is the effective extension of South Main. The Pendleton Street Arts District to the west effectively creates one “bookend” for Pendleton Street, the other bookend being South Main Street in the area of Fluor Field.

### SUSTAINING THE PENDLETON STREET ARTS DISTRICT

One of the defining urban locations in Greenville is what has emerged over the years as the Pendleton Street Arts District in the southwestern corner of the West Side study area. Many of the artists and related businesses in this revitalizing



### Case Study: Art Loft Apartments – St. Louis, Missouri

*The Washington Avenue Loft District in St. Louis is, today, a marvelous success story in the revitalization and re-use of historic 19<sup>th</sup> Century industrial loft buildings emanating from the core of downtown. Aided by a very strong historic tax credits program in Missouri, which coupled nicely with the federal historic tax credits program, investors in these buildings capitalized on growing interest in downtown/urban living and reduced-risk financing.*

*But what catalyzed it all? In essence, it was the artist community aided by a visionary developer/advocate. The developer, Tim Boyle of City Property, Inc., recognized the architectural value and occupancy potential of Washington Avenue which, in 1995, had a number of “squatters” and small investors. But the buildings were and are massive, extending over 30 or more city blocks. And finding financiers was next to impossible.*

*Boyle, and his then-partner Tim Tucker, determined that the best course of action was to use federal government funding for affordable housing but restrict its use to artists for an extended period of time. Artists were (and still are) known for being urban “pioneers” using cheap spaces but who are forced to move on after a few years after their “discoveries” become more widely patronized and populated.*

*The developer’s goal was to assure a longer and concentrated presence by the artists in order to set the stage for sustainable revitalization. They chose a building at 16<sup>th</sup> and Washington and obtained permission to restrict rents only to approved artists who would use the high ceiling, concrete spaces for live/work purposes. Initial restrictions were for artists-only for 15 years.*

*Rents were kept low because of various tax credits, favorable public financing, and the relatively little investment that the developer had to make. Essentially, he created big spaces with four walls, a bathroom, kitchen facilities, and fully upgraded HVAC systems. No major finishes or trimmings. Artists, themselves, could decorate, furnish, and finish as they saw fit (with some restrictions, of course, for a rental building).*

*A market study (conducted by Development Strategies primarily as an attitudinal survey of artists through the metropolitan area) confirmed that “market demand” would not be a hindrance. Since 1995, with the Art Lofts clearly demonstrating the viability of loft living and working in downtown St. Louis, Washington Avenue is routinely heralded a national success story as one of the “Great Streets” of America.*

commercial area were once tenants on South Main Street. In effect, artists on South Main in the late 1990s and early 2000s were forced to relocate as rents and other market factors became unaffordable when Downtown’s growth pushed into South Main.

A frequent pattern in urban revitalization is the growth of an arts community in relatively low-rent, former commercial areas where old buildings offer ample space for art studios, sometimes combined with housing and/or galleries.

Artists typically need large spaces for work and storage, but they also need access to supplies, customers, galleries, and the like. Edges of declining or re-emerging downtowns often satisfy these requirements, but most income-producing artists, particularly those who are fairly new to the “business,” cannot afford high-rent space.

Their work spaces and housing, however, tend to generate an intriguing urban lifestyle that, with time, attracts patrons. With patrons comes a market demand for support services like restaurants and small shops. As the buildings become occupied by an increas-

### **Case Study: Lowertown District – Paducah, Kentucky**

*During roundtable discussions for the West Side expanded market analysis, an oft-mentioned example of a stabilized arts district was Lowertown, adjacent to downtown Paducah, Kentucky.*

*Lowertown is the result of a then-unique approach to urban revitalization called the Artist Relocation Program. Modeled on a smaller effort in a much smaller city, Paducah leaders provided financial and related incentives to artists from around the nation to locate and invest in Lowertown.*

*In effect, the artists became the real estate owners of many historic houses in Lowertown which they upgraded and converted into joint homes and workshops. The artists, that is, generally live and work in the same place. And they own their properties. The public is invited to browse, and other support businesses have sprouted up as a result.*

*Approved artists have to demonstrate serious business savvy in addition to artistic talents. Paducah wants artists who have already demonstrated success and who likely have the wherewithal to manage both the business of being a commercial artist and the real estate. Still, the incentives can be considered generous by artists' standards, and include:*

**Rezoned district for live/work spaces.** *The City accomplished this in advance so that individual artists did not have to petition for zoning that previously did not apply in this predominantly single family housing neighborhood.*

**Properties are all but given** *to the qualified and approved artists. That said, the artist must attend to building renovations, but local financing terms are purposely generous.*

**The City remains the active promoter and manager of Lowertown** *through the Department of Planning for marketing and regulatory purposes in order to sustain market interest in the area. District-wide marketing costs are, therefore, not the responsibility of the artists. The marketing attracts additional qualified artists and it attracts customers/clients for the artists' products, although a very large share of their production is sold ("exported") to other cities, states, and nations, thus bringing "new money" into the Paducah economy.*

*Benefits to the City include a revitalized neighborhood, increased tax revenues, and a substantial branding of a 21<sup>st</sup> Century Paducah. The local Paducah Bank, which finances most of the artists' efforts, also benefits from obtaining long-time customers among the artists and other businesses in Lowertown.*

ingly diverse and eclectic set of work spaces, businesses, and residences, and as more patrons tour the area, space becomes relatively scarce and rents/prices are forced up. Many artists eventually move on to less expensive locations, hopefully re-starting the revitalization process elsewhere in the city.

A desire on the West Side is actually to forestall the outmigration of artists if and as the Pendleton Street Arts District achieves more diversity and higher property values. Instead, its artistic character might be preserved in some manner while coexisting with a number of other businesses and an increasing number of residences, both for artists and for the general public.

This is not an easy mission if market forces are strong. A review of several other urban artist districts, however, indicates that property ownership by the artists themselves (as opposed to strictly rental) is a preferred means to retain artists in place even as property values and rents rise around them. If they have a vested interest in that property value escalation, they are more likely to remain in place. That said, as always, they

would also be free to take advantage of the higher property values by selling out (or renting to others) and pocketing the proceeds. This is a challenging force to overcome, but is more readily accomplished if the artists have vested interests in real estate ownership.

A review of similar programs in other communities reveal several examples that might be used to guide program development in Greenville including the Lowertown Arts District in Paducah, Kentucky, is the best example, highlighted here. Other well-known examples like No-Da (for North Davidson Street in Charlotte, North Carolina) and Deep Ellum in Dallas, Texas, are still successful commercial and entertainment centers but are no longer significant locations for artists' facilities themselves. The revitalization of both of these areas was triggered by artist investment, but the artists moved out as rents rose. Both are, however, places where artists show off their wares—musical, performing arts, visual arts—in theaters, clubs, and galleries, but the artists themselves can no longer afford to operate work spaces there.

### **Recommended Actions**

It is a recommendation of this report that efforts be explored to help Village of West Greenville artists—and others yet to be drawn to this location—finance the ownership, renovation, and occupancy of properties in and near the district. In Paducah, property was offered for a nominal cost, even though renovations of “free” buildings were expensive. Financing of the renovations, however, was the purview of the local Paducah Bank which offered favorable terms in return for artists becoming the catalyst for Lowertown's revitalization. But the Lowertown program is still managed through the public sector at the City's Planning Department. This helps to assure compliance with all regulatory requirements for real estate while also keeping the growth of Lowertown as a high priority of local government.

## FOCUS ON GROCERY STORES

A major challenge to living in the West Side—indeed, in much of the greater downtown area—is the present inadequacies of convenient and healthy grocery store options. Residents with accessible transportation can shop in relatively close suburban locations. The Swamp Rabbit Grocery is an excellent—and growing—alternative for many households. And there are several convenience stores with limited grocery selections, though usually not fresh produce. But too few grocery options within a convenient time-distance are driving some resistance to further increases in the quality of life in the West Side.

Residents of the West Side study area occupy an estimated 7,300 households and generate market demand for groceries of \$5.2 million per year.<sup>3</sup> Assuming average retail store sales of \$320 per square foot per year, this demand from the West Side could support a grocery store of about 16,000 square feet. A store of this scale, however, would be quite small and almost certainly would not generate much interest among grocery retailers to create a store of that size, especially given the geographic and demographic diversity of the West Side.

But that does not preclude an opportunity for creating grocery stores in the West Side, as is discussed herein.

## THE WEST SIDE IS MOSTLY A FOOD DESERT

Fueling the inadequacies of grocer options is that most of the West Side is considered within a “food desert” under the definition set by the U.S. Department of Agriculture (USDA). The map on the next page roughly outlines the West Side study area in a trapezoidal shape (Pete Hollis Boulevard to the north, downtown to the east, and so on). The green areas are designated food deserts under the federal guidelines.

Food deserts are defined primarily on the basis of census tracts. Thus, the USDA works closely with the Census Bureau to delineate food deserts. Moreover, the Census Bureau and the U.S. Department of Commerce where the Census Bureau is located have demographic and business databases to identify such food desert criteria as:

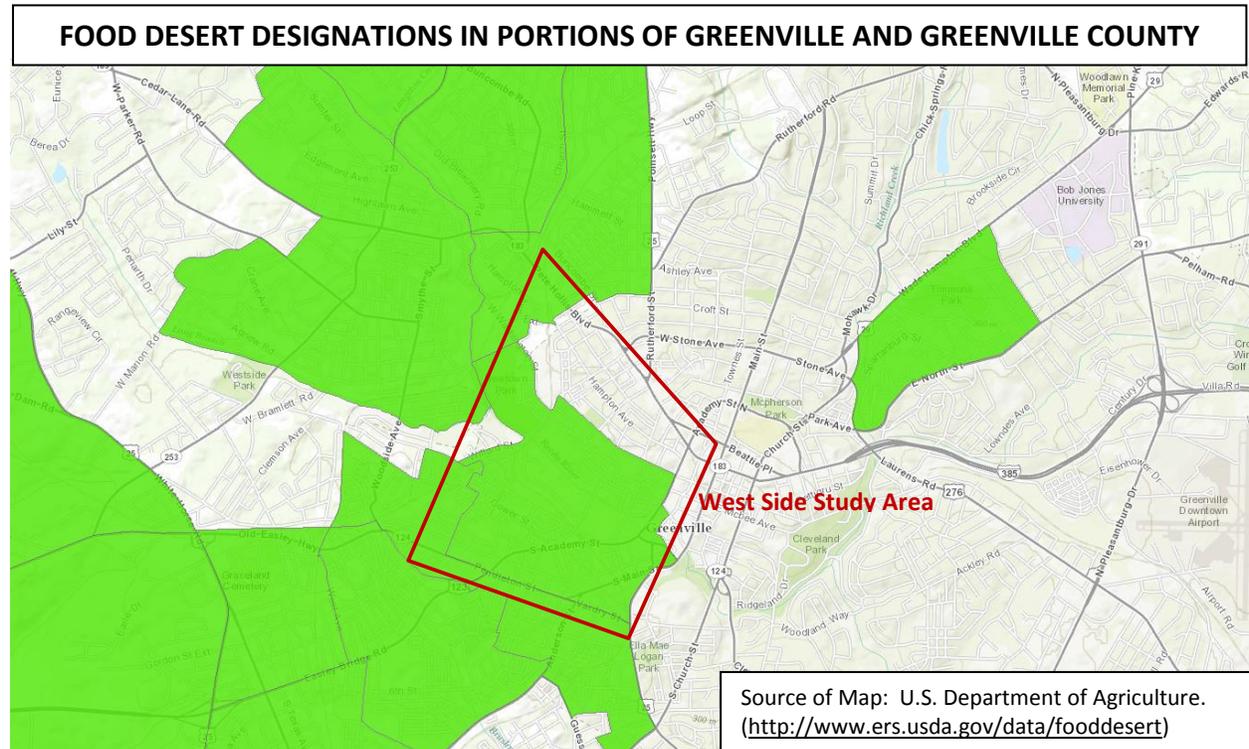
- Lack of ready access (one mile) to fresh, healthy, and affordable foods, and/or
- Lack supermarkets and grocery stores, and/or
- Served only by fast food restaurants and convenience stores.

Some potential food deserts otherwise meeting the above criteria are excluded because households are relatively affluent and, in particular, have higher rates of vehicle ownership allowing them to more conveniently

---

<sup>3</sup> That is, they spend \$5.2 million per year at grocery stores. Source is Esri for the year 2012. This demand excludes two other food and beverage categories: Specialty Food Stores and Beer, Wine, and Liquor Stores. Together the three categories, which make up the retail Food and Beverage sector, generate demand of just over \$5.5 million per year in the West Side.

and cost-effectively drive a greater distance to healthy food options and supermarkets. That is, many prosperous suburban households may be well over a mile away from healthy foods, but driving is not a hindrance as it could be in lower income neighborhoods.

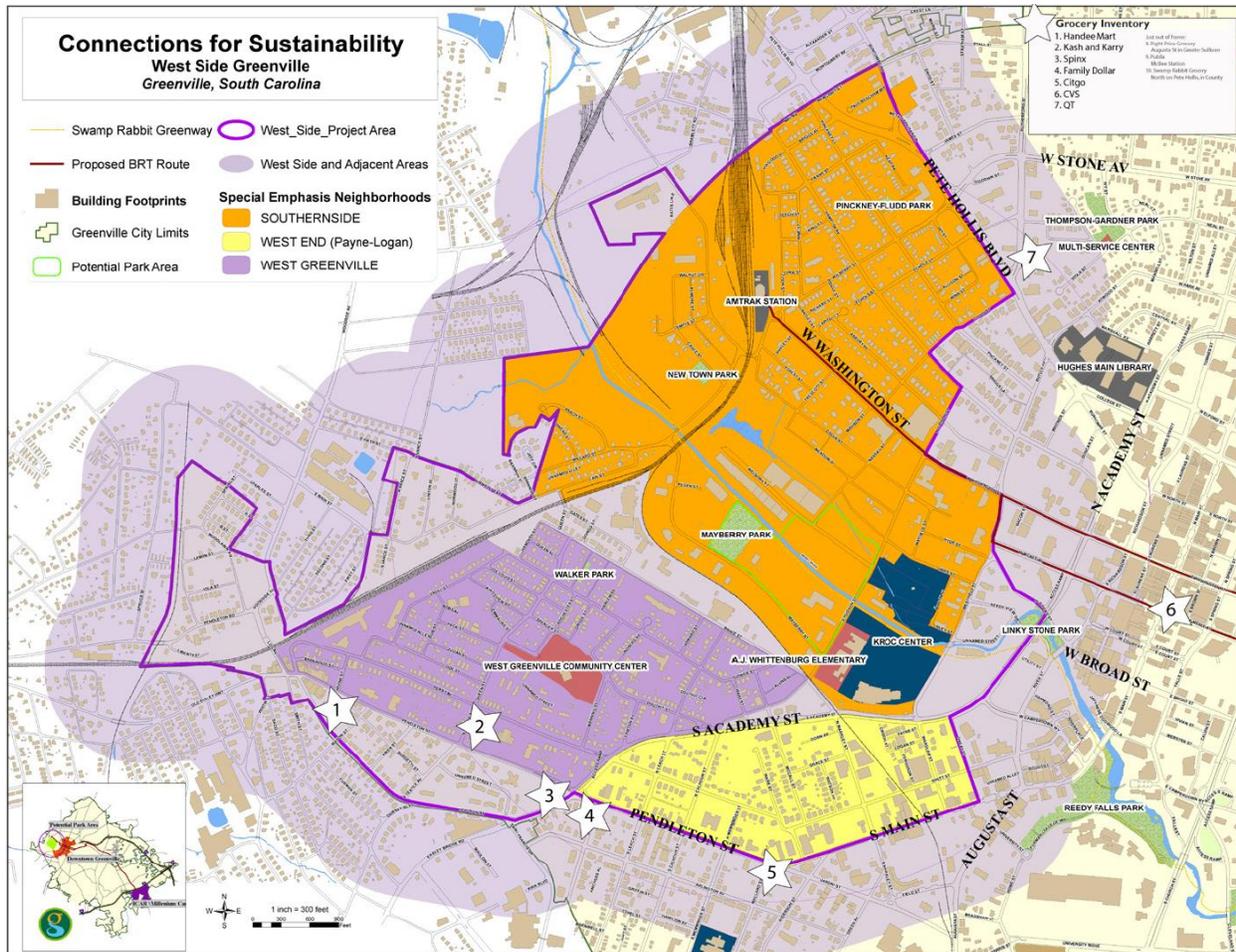


Using such criteria, most of the West Side study area ends up in a food desert. Simply put, most of the residents of the West Side are too inconveniently far away from healthy food choices and, thus, are assumed to be at high risk for illnesses and diseases that thrive from lack of good nourishment.

That said, the West Side is not entirely without grocery options, as the following map illustrates. The map was created by the Community Development staff of the City of Greenville at the request of Development Strategies. It shows various stores where some degree of groceries are presently available within the geographic confines of the map itself. Close by, but off the map, is the Swamp Rabbit Grocery which has a wider range of food items—particularly fresh food items—than the few stores numbered on the map:

1. Handee Mart
2. Kash & Karry on Pendleton Street. (The Kash & Karry on Pete Hollis, while a newer and more attractive store, does not carry groceries.)
3. Spinx (gas station and convenience mart)
4. Family Dollar (general store)
5. Citco (gas station and convenience mart)
6. CVS (pharmacy, drug store)
7. QT (gas station and convenience mart)

Food desert definitions would not recognize the above stores as viable fresh food options for the most part. Thus, while convenient to residents of the West Side, they do not qualify as food stores in a manner that would eliminate the food desert designation.



In light of the relatively small grocery store demand that is generated from the “buying power” of West Side households, one partial solution to the food desert challenge could be to greatly improve vehicular access to the range of existing food stores elsewhere in the city and county. Regular and targeted bus or van service might solve some of this problem, for instance. Another partial solution can be creation of urban farms, community gardens, and farmers markets in or very near the West Side. At some times of the year, therefore, West Side residents could have more convenient access to fresh, locally grown food choices. This is an excellent idea and a productive use of otherwise under-used land in the West Side, though continued growth for housing and commercial purposes may one day eliminate some community gardens. But continued growth would also increase the potential demand generated from within the West Side and, therefore, would increase the likelihood of attracting a full service grocery store.

**MAKING THE CASE FOR NEW GROCERY STORE(S) IN THE WEST SIDE**

Even better in the near term would be a full-line grocery store in the West Side, or two smaller stores (say, one south and one north) each of sufficient scale in an urban context that they warrant investment by the retail grocery industry. Readily available market data do not automatically flag the West Side for this idea, but a look at such data from a different point of view makes a case for on-site stores.

Almost certainly, a minimum size store would be 20,000 square feet. For purposes of the following analysis to determine the potential feasibility for attracting grocery stores to the West Side, it is assumed (conservatively) that demand must be demonstrated for two stores of 25,000 square feet each. (See the accompanying case study for Kansas City which is constructing a 30,000 square foot store.) The working assumption is that two stores, rather than one, make the most sense for the West Side because of the somewhat difficult access options between the southern part of the West Side and the northern part. In other words, they can be readily identified as two separate markets if only because of geographic barriers.

Where might the demand come from to support even one 25,000 square foot store, let alone two?	There is a two-part answer: (1) By slightly shifting the supply side (i.e., stores) of the supply-demand equation away from, say, suburban areas to the West Side. (2) By capturing buying power (demand) from areas both near and within the West Side.
---	--

Analysis for this potential grocery store development first assumes that new, 25,000 square foot grocery stores could be located conveniently along Pete Hollis Boulevard (say, at the former Green Plaza site) and along Pendleton Street (somewhere between Academy Street and the Village of West Greenville—a midpoint was selected here for illustration purposes).

Simple circles of three-mile radii around each of these locations were created using the geographic information systems mapping of Esri. Household buying power for grocery purchases was determined for these radii, which reveals the following:

- Within three miles of the Pendleton Street site (source: Esri 2014). . .
  - Households have grocery store purchasing power of \$79.8 million per year.
  - Existing stores within those three miles sell \$142.4 million worth of grocery items.
  - Thus, the stores within three miles attract some \$62.6 million *more* in sales than the market area is able to afford by itself. These stores must be strong enough, therefore, to attract demand from even further away than three miles while also attracting demand from residents of at least part of the West Side.
- Within three miles of the Pete Hollis Boulevard site (source: Esri 2014). . .
  - Households have grocery store purchasing power of \$80.3 million per year.

- Stores within those three miles sell \$192.9 million in grocery items.
- Thus, the stores within three miles attract some \$112.6 million *more* in sales than the market area can itself afford. These stores must be strong enough, therefore, to attract demand from even further away than three miles while also attracting demand from residents of at least part of the West Side.
- The two sites are about two miles apart, so their three-mile radii overlap. Thus, the purchasing power noted above is partly double counted. Adjusting for double counting:
  - Households in the combined radii have grocery store purchasing power of \$120 million per year.
  - Existing stores within the combined area sell \$250 million in grocery items.
  - Thus, the stores within the combined area attract some \$130 million *more* in sales than the combined radii area can support.
- Two 25,000 square foot stores in the West Side would require about \$16 million in annual sales (at \$320 per square foot). Because they would be smaller format stores in urban neighborhoods and will likely be perceived by the grocery industry as therefore more risky, we assume that the target sales total should be \$20 million per year shared among the two stores.
- This would require a “shift” of \$20 million from existing stores serving the population of the combined radius areas to the new stores. This shift would represent about 15 percent of the current *excess sales over purchasing power* of \$130 million ( $\$20 \text{ million} \div \$130 \text{ million} = 15\%$ ).

In other words, there is ample room in the marketplace to warrant this shift without substantial impacts on existing grocery stores in the combined radius areas. A shift of \$20 million to two new stores would still leave “excess sales” of \$110 million for the existing stores. Moreover, these are 2013 dollar amounts and household counts. Greenville County, alone, has been growing by about 1.6 percent per year since 2010, adding more than 7,000 residents each year. The aggregate buying power of County residents should be expected to grow, thus easing the strain of any shifts in grocery store purchase locations.<sup>4</sup>

But even supposing that household counts and buying power remain the same, a key finding is that there would be *no net change in buying power or sales capture* within the combined three-mile radius areas. If it is assumed that households in the West Side, which is fully within the combined three-mile radius area, make all of their grocery purchases in stores also within that combined three-mile radius area, many of those sales would simply shift from existing stores to the two new stores. The market area would experience no net loss, though existing stores would experience a collective decline of \$20 million. But a significant benefit of this shift would be that the West Side, as an urban and urbanizing set of neighborhoods also convenient to thou-

---

<sup>4</sup> Indeed, the Esri reports downloaded for this analysis project a 1.7% annual average household growth in the three-mile radii around both the Pete Hollis and Pendleton sites for the five years between 2012 and 2017.

sands of downtown residents, would gain easier access to high quality groceries and would no longer be designated as a food desert.

That said, the grocery industry will likely be generally reluctant to make an investment in one or two urban-scaled stores in the West End without some public sector involvement. On the other side of that coin, the public sector would very much like to see one or two urban-scaled stores in the West Side, so it has an incentive (perhaps even a political mandate) to provide financial and other support to attract grocery stores.

The grocery industry, however, will not automatically come to the City of Greenville to make such a pitch. Instead, the City should approach the grocery industry itself, armed with an analysis like the above but also with information on available sites and incentives.

Possible incentives need not be entirely “cash related,” as in providing upfront dollars to attract development. They might also include property contributions for land already owned by the City, fast-track permitting and approvals, and long-term tax abatement or future commitments of incremental tax revenues not now generated by subject sites.

Typically, the best way to approach a particular sector of the retail market is through a real estate developer of grocery stores and related retail centers. Analysis for this market study did not determine likely retail developers in the Greenville area, but they are probably well-known to city planners. If not, they can be readily identified through local commercial real estate organizations.

The recommendation of this report is to initially meet informally and individually with several such developers and discuss the strategy and data outlined above. Use their expertise to obtain further advice on whether and how to proceed with contacts into the grocery industry. Appendices A and B to this report contain Esri data relevant to the analysis, which should be shared with the developers. The City can supplement such information with attractive

### **Whole Foods and Trader Joes: Possibilities for the West Side?**

*Could the West Side attract, say, a Trader Joe’s or Whole Foods grocery store? Setting aside that the Greenville area already has one of each in nearly the same location where I-85 and I-385 meet in northeast Greenville, both offer stores that are seemingly suitable in size and style for the urban market locations suggested by the West Side.*

*But one store each is almost certainly the limit for Greenville. Anecdotal information from news articles indicates the following location criteria for each store (unconfirmed by either corporation):*

*Whole Foods: 200,000 or more population within a 20-minute drive, store of 25,000 to 50,000 square feet, large number of college-educated residents, ample exclusive parking, easy road access, excellent visibility. (Esri, using Census data, says there are 333,500 people within 20 minutes of the middle of the West Side, but this includes a huge share of the existing Whole Foods’ market area.)*

*Trader Joe’s: 36,000 people with four-year college degrees within 15 minutes. These people should have a median age of 44 and household incomes of \$64,000. (Esri says there are 22,500 4-year degrees within 15 minutes of the middle of the West Side. While Esri doesn’t report the median incomes of college educated households, the overall median income within 15 minutes is under \$40,000.)*

*Other, perhaps less well-known, urban grocers might be interested, however.*

presentations of population and housing growth trends and projections in the area, traffic counts on the major roads, numbers of nearby jobs/employees, and counts of non-local visitors (e.g., conventioners, tourists, even business visitors). Together, such information can make a compelling case that there is not only a local

**LOOK TO LOCAL GROCERS FIRST**  
*A corollary action by City officials could be a direct, though initially informal, approach to a local grocer or two who is already of the scale that can work in the West Side and who may be quite interested in either a better location or additional locations. An obvious example is the Swamp Rabbit Grocery and Café where the entrepreneurs are honing their own model of success but in a location that is decidedly not as prominent as the West Side can offer.*

resident market to support two grocery stores but that significant additional sales can be targeted toward identifiable non-resident market segments.

**PARTNERSHIPS TO ACHIEVE GROCERY STORES**

The City should then structure a public-private partnership with a selected developer to jointly approach prospective grocers. One outcome of this partnership, by the way, may be a larger development at one or both sites to incorporate satellite stores anchored by the grocery store so that a synergistic, fuller-purpose shopping center is created, making the

location all that much more attractive for developers, retailers, and customers.



Two examples of urban-scale grocery retailers are Wal-Mart’s Neighborhood Market which is typically a 40,000 square foot store predominately stocked with grocery items and StockBox Neighborhood Grocery in the Seattle, Washington, area. Stockbox is working to build a network of stores that are the hub for fresh food, community connections, engaging experiences, and innovation in grocery:

- Food: be the source for fresh food in the neighborhood
- Community: invest in community success
- Experience: cultivate the destination for friends to connect
- Innovation: shift the food system and reimagine grocery for everyone

See: <http://stockboxgrocers.com/>

The City brings to such partnerships a number of potential tools and assets. One can be the land itself. The City already controls most of the former Green Plaza site on Pete Hollis, for example. It may be able to acquire more land there, and also assemble an appropriately sized site along Pendleton Street. Creation of larger sites from smaller tracts by City officials removes that time and expense factor as a burden to the private

real estate industry. The sites become, therefore, more attractive and quicker to develop. Moreover, the City can perhaps offer the sites at very low or no costs (at least for a few years) to the developer, another factor that reduces expenses and risks for the private sector.

The food desert reality suggests other partnership potentials, particularly within the health care sector. St. Francis Medical Center is a neighbor to the West Side. Surely, many West Siders are patients of St. Francis. A chief goal of the medical profession is to keep people healthy, and a significant means for maintaining healthy lifestyles is good and routine nutrition. But that requires convenient access to fresh and healthy foods with sufficient dietary diversity. Even more, healthy eating requires a working knowledge of food storage and preparation techniques, many of which are very basic, but often lacking in lower income neighborhoods.

Unfortunately, low income neighborhoods are not only often food deserts because of a lack of food purchase options, but because healthy cooking and eating is rare. There are simply too many dysfunctional families and households where good cooking practices are not learned generation to generation, resulting in people unable to prepare good meals in a variety of interesting ways even if the food itself is plentiful.

A partnership with, say, St. Francis or other kinds of health care providers can address two major issues related to the food desert circumstance in the West Side.

1. Financing of a new store or two might be eased by a partnership with health care providers. It is in their interest to assure that the general public is healthy, or is as healthy as individuals and families can achieve with proper nutrition, exercise, and so forth. Thus, health care providers may be very interested in directing some of their financial and human resources into better nutritional programs and facilities for local residents in order to prevent illnesses as opposed to using those resources to correct illnesses.
2. Given the food desert conditions of the West Side, the health care sector can also be instrumental in helping to educate and train local residents about good nutrition, proper shopping techniques, and meal preparation. Again, it is in the interest of the medical industry to keep people healthy. Having access to food is one thing; teaching people how to better attend to their personal and family nutritional needs is another. Institutions like St. Francis may be quite willing to redirect the skills of their dietitians and related professionals to the West Side in an effort to, again, prevent rather than treat certain illnesses.

### Case Study: Hospital Hill Grocery Store in Kansas City, Missouri

---

*Development Strategies was part of a consulting team in 2011 that conducted a feasibility study for development of a small grocery store on the predominately lower income east side of Kansas City near the Truman Medical Center (TMC) on Hospital Hill. TMC serves as the only public hospital in Kansas City and is the medical school for the University of Missouri-Kansas City.*

*The project kicked off with a pronouncement by the then-CEO of TMC that the emergency room saw too many patients with illnesses that a few good meals could cure or prevent. He saw it as a mission of TMC, therefore, to take the health care skills of the hospital to the community rather than wait for a sick community to come to the hospital.*

*Like Greenville's West Side, much of Kansas City's east side fits the definition of food desert. There are food stores, but they are of very low quality. Even local residents, during a public engagement process, admitted not wanting to shop in those stores, but they had too few means to travel to better stores in the suburbs or elsewhere in the city. And they admitted to being poorly educated in the ways of cooking.*

*As of this writing, the Hospital Hill Economic Development Corporation (HHEDC), the development entity for TMC, is partnering with the City of Kansas City to obtain "contributions tax credits" from the State of Missouri to help raise private funding, along with hospital funding, to construct a new, \$16 million, 30,000 square foot facility. Its 2014 application for tax credits states:*

*"In the new world of healthcare reform, it is important to keep people out of the hospital and TMC has been a meaningful presence in working to change the behavior in the community.*

*"TMC. . . is committed to undertaking the challenge of a new urban grocery store model that will include health amenities such as cooking and nutritional classes along with ancillary retail facilities, a seasonal shade structure for a farmers' market, a terraced lawn amphitheater with stage shelter [for community gatherings], future space for other support retail, and pedestrian connections to the surrounding neighborhoods.*

*"The 27th & Troost Grocery Store will be focused on community health, improved nutrition, sustainable practices, and community engagement. The store is planned to be a one-stop-shop grocery open to the public with extensive produce, meats, dairy, bakery, floral, and pre-assembled and pre-prepared meals. The store will have a multi-use commercial kitchen for preparing catered dishes, conducting cooking schools, and hosting community events. Additionally, the MAX bus line [one of two bus rapid transit lines in Kansas City] and shelter currently located at the south end of the site will provide accessible and affordable transportation to the grocery store for patrons both within and outside the area. HHEDC has developed a marketing plan for the grocery store to serve the general public, the professionals and students on Hospital Hill, the neighborhood, and the greater downtown community."*

---

Appendix A: Retail Market Profile Data for Pete Hollis Boulevard Grocery Site

Appendix B: Retail Market Profile Data for Pendleton Street Grocery Site

Separate Document: Tapestry™ Segmentation Reference Guide



## Retail Market Potential

Pete Hollis Site  
29601 (Greenville), SC  
Ring: 1 mile radius

Supermarket Site Comparisons  
Latitude: 34.85892  
Longitude: -82.40531

Demographic Summary	2012	2017
Population	7,838	8,606
Population 18+	6,434	7,085
Households	3,647	4,020
Median Household Income	\$22,208	\$25,537

Product/Consumer Behavior	Expected Number Adults/HHs	Percent of Adults/HHs	MPI
<b>Apparel (Adults)</b>			
Bought any men's apparel in last 12 months	2,643	41.1%	82
Bought any women's apparel in last 12 months	2,779	43.2%	95
Bought apparel for child <13 in last 6 months	1,595	24.8%	87
Bought any shoes in last 12 months	3,037	47.2%	91
Bought costume jewelry in last 12 months	1,338	20.8%	100
Bought any fine jewelry in last 12 months	1,570	24.4%	111
Bought a watch in last 12 months	1,348	21.0%	108
<b>Automobiles (Households)</b>			
HH owns/leases any vehicle	2,576	70.6%	82
HH bought/leased new vehicle last 12 mo	257	7.0%	73
<b>Automotive Aftermarket (Adults)</b>			
Bought gasoline in last 6 months	4,675	72.7%	84
Bought/changed motor oil in last 12 months	2,824	43.9%	85
Had tune-up in last 12 months	1,688	26.2%	84
<b>Beverages (Adults)</b>			
Drank bottled water/seltzer in last 6 months	3,589	55.8%	90
Drank regular cola in last 6 months	3,472	54.0%	106
Drank beer/ale in last 6 months	2,507	39.0%	92
<b>Cameras &amp; Film (Adults)</b>			
Bought any camera in last 12 months	799	12.4%	97
Bought film in last 12 months	1,114	17.3%	91
Bought digital camera in last 12 months	448	7.0%	102
Bought memory card for camera in last 12 months	420	6.5%	86
<b>Cell Phones/PDAs &amp; Service (Adults)</b>			
Bought cell/mobile phone/PDA in last 12 months	1,890	29.4%	83
Avg monthly cell/mobile phone/PDA bill: \$1-\$49	1,233	19.2%	90
Avg monthly cell/mobile phone/PDA bill: \$50-99	1,877	29.2%	90
Avg monthly cell/mobile phone/PDA bill: \$100+	923	14.3%	68
<b>Computers (Households)</b>			
HH owns a personal computer	2,083	57.1%	77
Spent <\$500 on most recent home PC purchase	271	7.4%	86
Spent \$500-\$999 on most recent home PC purchase	498	13.7%	76
Spent \$1000-\$1499 on most recent home PC purchase	341	9.4%	71
Spent \$1500-\$1999 on most recent home PC purchase	236	6.5%	90
Spent \$2000+ on most recent home PC purchase	195	5.3%	85

**Data Note:** An MPI (Market Potential Index) measures the relative likelihood of the adults in the specified trade area to exhibit certain consumer behavior or purchasing patterns compared to the U.S. An MPI of 100 represents the U.S. average.

**Source:** These data are based upon national propensities to use various products and services, applied to local demographic composition. Usage data were collected by GfK MRI in a nationally representative survey of U.S. households. Esri forecasts for 2012 and 2017.



# Retail Market Potential

Pete Hollis Site  
 29601 (Greenville), SC  
 Ring: 1 mile radius

Supermarket Site Comparisons  
 Latitude: 34.85892  
 Longitude: -82.40531

Product/Consumer Behavior	Expected Number Adults/HHs	Percent of Adults/HHs	MPI
<b>Convenience Stores (Adults)</b>			
Shopped at convenience store in last 6 months	3,298	51.3%	85
Bought cigarettes at convenience store in last 30 days	1,094	17.0%	110
Bought gas at convenience store in last 30 days	1,797	27.9%	84
Spent at convenience store in last 30 days: <\$20	475	7.4%	77
Spent at convenience store in last 30 days: \$20-39	558	8.7%	85
Spent at convenience store in last 30 days: \$40+	1,936	30.1%	84
<b>Entertainment (Adults)</b>			
Attended movies in last 6 months	3,458	53.7%	91
Went to live theater in last 12 months	725	11.3%	85
Went to a bar/night club in last 12 months	1,303	20.3%	106
Dined out in last 12 months	2,674	41.6%	84
Gambled at a casino in last 12 months	857	13.3%	83
Visited a theme park in last 12 months	900	14.0%	65
DVDs rented in last 30 days: 1	141	2.2%	83
DVDs rented in last 30 days: 2	275	4.3%	92
DVDs rented in last 30 days: 3	184	2.9%	89
DVDs rented in last 30 days: 4	196	3.0%	79
DVDs rented in last 30 days: 5+	761	11.8%	89
DVDs purchased in last 30 days: 1	316	4.9%	99
DVDs purchased in last 30 days: 2	287	4.5%	94
DVDs purchased in last 30 days: 3-4	239	3.7%	80
DVDs purchased in last 30 days: 5+	388	6.0%	117
Spent on toys/games in last 12 months: <\$50	360	5.6%	92
Spent on toys/games in last 12 months: \$50-\$99	184	2.9%	104
Spent on toys/games in last 12 months: \$100-\$199	443	6.9%	96
Spent on toys/games in last 12 months: \$200-\$499	602	9.4%	87
Spent on toys/games in last 12 months: \$500+	281	4.4%	76
<b>Financial (Adults)</b>			
Have home mortgage (1st)	919	14.3%	75
Used ATM/cash machine in last 12 months	2,783	43.3%	85
Own any stock	570	8.9%	96
Own U.S. savings bond	314	4.9%	72
Own shares in mutual fund (stock)	519	8.1%	86
Own shares in mutual fund (bonds)	379	5.9%	100
Used full service brokerage firm in last 12 months	416	6.5%	104
Have savings account	1,978	30.7%	85
Have 401K retirement savings	791	12.3%	69
Did banking over the Internet in last 12 months	1,270	19.7%	72
Own any credit/debit card (in own name)	4,000	62.2%	84
Avg monthly credit card expenditures: <\$111	788	12.2%	89
Avg monthly credit card expenditures: \$111-225	440	6.8%	88
Avg monthly credit card expenditures: \$226-450	398	6.2%	83
Avg monthly credit card expenditures: \$451-700	316	4.9%	77
Avg monthly credit card expenditures: \$701+	834	13.0%	96

**Data Note:** An MPI (Market Potential Index) measures the relative likelihood of the adults in the specified trade area to exhibit certain consumer behavior or purchasing patterns compared to the U.S. An MPI of 100 represents the U.S. average.

**Source:** These data are based upon national propensities to use various products and services, applied to local demographic composition. Usage data were collected by GfK MRI in a nationally representative survey of U.S. households. Esri forecasts for 2012 and 2017.



# Retail Market Potential

Pete Hollis Site  
 29601 (Greenville), SC  
 Ring: 1 mile radius

Supermarket Site Comparisons  
 Latitude: 34.85892  
 Longitude: -82.40531

Product/Consumer Behavior	Expected Number Adults/HHs	Percent of Adults/HHs	MPI
<b>Grocery (Adults)</b>			
Used beef (fresh/frozen) in last 6 months	4,186	65.1%	92
Used bread in last 6 months	6,203	96.4%	100
Used chicken/turkey (fresh or frozen) in last 6 months	4,737	73.6%	95
Used fish/seafood (fresh or frozen) in last 6 months	3,322	51.6%	98
Used fresh fruit/vegetables in last 6 months	5,525	85.9%	99
Used fresh milk in last 6 months	5,577	86.7%	96
<b>Health (Adults)</b>			
Exercise at home 2+ times per week	1,703	26.5%	88
Exercise at club 2+ times per week	833	12.9%	104
Visited a doctor in last 12 months	4,943	76.8%	99
Used vitamin/dietary supplement in last 6 months	2,952	45.9%	95
<b>Home (Households)</b>			
Any home improvement in last 12 months	1,078	29.6%	94
Used housekeeper/maid/prof HH cleaning service in the last 12	506	13.9%	88
Purchased any HH furnishing in last 12 months	892	24.5%	81
Purchased bedding/bath goods in last 12 months	1,893	51.9%	95
Purchased cooking/serving product in last 12 months	886	24.3%	88
Bought any kitchen appliance in last 12 months	617	16.9%	97
<b>Insurance (Adults)</b>			
Currently carry any life insurance	2,668	41.5%	87
Have medical/hospital/accident insurance	4,339	67.4%	94
Carry homeowner insurance	2,244	34.9%	67
Carry renter insurance	587	9.1%	148
Have auto/other vehicle insurance	4,373	68.0%	82
<b>Pets (Households)</b>			
HH owns any pet	1,296	35.5%	69
HH owns any cat	717	19.7%	82
HH owns any dog	1,136	31.1%	83
<b>Reading Materials (Adults)</b>			
Bought book in last 12 months	2,735	42.5%	85
Read any daily newspaper	2,643	41.1%	100
Heavy magazine reader	1,441	22.4%	112
<b>Restaurants (Adults)</b>			
Went to family restaurant/steak house in last 6 mo	4,080	63.4%	88
Went to family restaurant/steak house last mo: <2 times	1,467	22.8%	89
Went to family restaurant/steak house last mo: 2-4 times	1,505	23.4%	87
Went to family restaurant/steak house last mo: 5+ times	1,109	17.2%	89
Went to fast food/drive-in restaurant in last 6 mo	5,301	82.4%	93
Went to fast food/drive-in restaurant <6 times/mo	2,179	33.9%	97
Went to fast food/drive-in restaurant 6-13 times/mo	1,522	23.7%	82
Went to fast food/drive-in restaurant 14+ times/mo	1,600	24.9%	100
Fast food/drive-in last 6 mo: eat in	2,042	31.7%	84
Fast food/drive-in last 6 mo: home delivery	618	9.6%	92
Fast food/drive-in last 6 mo: take-out/drive-thru	2,710	42.1%	81
Fast food/drive-in last 6 mo: take-out/walk-in	1,641	25.5%	104

**Data Note:** An MPI (Market Potential Index) measures the relative likelihood of the adults in the specified trade area to exhibit certain consumer behavior or purchasing patterns compared to the U.S. An MPI of 100 represents the U.S. average.

**Source:** These data are based upon national propensities to use various products and services, applied to local demographic composition. Usage data were collected by GfK MRI in a nationally representative survey of U.S. households. Esri forecasts for 2012 and 2017.



## Retail Market Potential

Pete Hollis Site  
 29601 (Greenville), SC  
 Ring: 1 mile radius

Supermarket Site Comparisons  
 Latitude: 34.85892  
 Longitude: -82.40531

Product/Consumer Behavior	Expected Number Adults/HHs	Percent of Adults/HHs	MPI
<b>Telephones &amp; Service (Households)</b>			
HH owns in-home cordless telephone	1,906	52.3%	81
HH average monthly long distance phone bill: <\$16	782	21.4%	78
HH average monthly long distance phone bill: \$16-25	368	10.1%	88
HH average monthly long distance phone bill: \$26-59	298	8.2%	89
HH average monthly long distance phone bill: \$60+	148	4.1%	91
<b>Television &amp; Sound Equipment (Adults/Households)</b>			
HH owns 1 TV	1,013	27.8%	140
HH owns 2 TVs	963	26.4%	100
HH owns 3 TVs	693	19.0%	85
HH owns 4+ TVs	657	18.0%	86
HH subscribes to cable TV	2,323	63.7%	110
HH Purchased audio equipment in last 12 months	346	9.5%	97
HH Purchased CD player in last 12 months	123	3.4%	87
HH Purchased DVD player in last 12 months	338	9.3%	95
HH Purchased MP3 player in last 12 months	602	9.4%	91
HH Purchased video game system in last 12 months	338	9.3%	86
<b>Travel (Adults)</b>			
Domestic travel in last 12 months	2,750	42.7%	82
Took 3+ domestic trips in last 12 months	678	10.5%	71
Spent on domestic vacations last 12 mo: <\$1000	676	10.5%	83
Spent on domestic vacations last 12 mo: \$1000-\$1499	366	5.7%	85
Spent on domestic vacations last 12 mo: \$1500-\$1999	234	3.6%	89
Spent on domestic vacations last 12 mo: \$2000-\$2999	296	4.6%	111
Spent on domestic vacations last 12 mo: \$3000+	289	4.5%	89
Foreign travel in last 3 years	1,356	21.1%	81
Took 3+ foreign trips by plane in last 3 years	267	4.2%	86
Spent on foreign vacations last 12 mo: <\$1000	388	6.0%	101
Spent on foreign vacations last 12 mo: \$1000-\$2999	306	4.8%	116
Spent on foreign vacations last 12 mo: \$3000+	294	4.6%	92
Stayed 1+ nights at hotel/motel in last 12 months	2,107	32.7%	81

**Data Note:** An MPI (Market Potential Index) measures the relative likelihood of the adults in the specified trade area to exhibit certain consumer behavior or purchasing patterns compared to the U.S. An MPI of 100 represents the U.S. average.

**Source:** These data are based upon national propensities to use various products and services, applied to local demographic composition. Usage data were collected by GfK MRI in a nationally representative survey of U.S. households. Esri forecasts for 2012 and 2017.



## Retail Market Potential

Pete Hollis Site  
29601 (Greenville), SC  
Ring: 3 mile radius

Supermarket Site Comparisons  
Latitude: 34.85892  
Longitude: -82.40531

Demographic Summary	2012	2017
Population	73,280	79,666
Population 18+	57,764	62,899
Households	29,657	32,233
Median Household Income	\$28,367	\$32,440

Product/Consumer Behavior	Expected Number Adults/HHs	Percent of Adults/HHs	MPI
<b>Apparel (Adults)</b>			
Bought any men's apparel in last 12 months	25,751	44.6%	89
Bought any women's apparel in last 12 months	24,931	43.2%	95
Bought apparel for child <13 in last 6 months	15,761	27.3%	96
Bought any shoes in last 12 months	28,472	49.3%	95
Bought costume jewelry in last 12 months	11,953	20.7%	99
Bought any fine jewelry in last 12 months	13,221	22.9%	104
Bought a watch in last 12 months	11,777	20.4%	105
<b>Automobiles (Households)</b>			
HH owns/leases any vehicle	23,382	78.8%	92
HH bought/leased new vehicle last 12 mo	1,990	6.7%	70
<b>Automotive Aftermarket (Adults)</b>			
Bought gasoline in last 6 months	46,571	80.6%	93
Bought/changed motor oil in last 12 months	29,389	50.9%	98
Had tune-up in last 12 months	16,051	27.8%	89
<b>Beverages (Adults)</b>			
Drank bottled water/seltzer in last 6 months	32,728	56.7%	92
Drank regular cola in last 6 months	31,651	54.8%	107
Drank beer/ale in last 6 months	22,522	39.0%	92
<b>Cameras &amp; Film (Adults)</b>			
Bought any camera in last 12 months	6,877	11.9%	93
Bought film in last 12 months	10,637	18.4%	97
Bought digital camera in last 12 months	3,342	5.8%	84
Bought memory card for camera in last 12 months	3,425	5.9%	78
<b>Cell Phones/PDAs &amp; Service (Adults)</b>			
Bought cell/mobile phone/PDA in last 12 months	19,059	33.0%	93
Avg monthly cell/mobile phone/PDA bill: \$1-\$49	11,417	19.8%	93
Avg monthly cell/mobile phone/PDA bill: \$50-99	17,257	29.9%	92
Avg monthly cell/mobile phone/PDA bill: \$100+	9,564	16.6%	78
<b>Computers (Households)</b>			
HH owns a personal computer	17,751	59.9%	81
Spent <\$500 on most recent home PC purchase	2,301	7.8%	90
Spent \$500-\$999 on most recent home PC purchase	4,287	14.5%	81
Spent \$1000-\$1499 on most recent home PC purchase	2,829	9.5%	73
Spent \$1500-\$1999 on most recent home PC purchase	1,731	5.8%	82
Spent \$2000+ on most recent home PC purchase	1,476	5.0%	79

**Data Note:** An MPI (Market Potential Index) measures the relative likelihood of the adults in the specified trade area to exhibit certain consumer behavior or purchasing patterns compared to the U.S. An MPI of 100 represents the U.S. average.

**Source:** These data are based upon national propensities to use various products and services, applied to local demographic composition. Usage data were collected by GfK MRI in a nationally representative survey of U.S. households. Esri forecasts for 2012 and 2017.



# Retail Market Potential

Pete Hollis Site  
 29601 (Greenville), SC  
 Ring: 3 mile radius

Supermarket Site Comparisons  
 Latitude: 34.85892  
 Longitude: -82.40531

Product/Consumer Behavior	Expected Number Adults/HHs	Percent of Adults/HHs	MPI
<b>Convenience Stores (Adults)</b>			
Shopped at convenience store in last 6 months	33,053	57.2%	95
Bought cigarettes at convenience store in last 30 days	11,242	19.5%	126
Bought gas at convenience store in last 30 days	20,067	34.7%	104
Spent at convenience store in last 30 days: <\$20	4,488	7.8%	81
Spent at convenience store in last 30 days: \$20-39	5,286	9.2%	90
Spent at convenience store in last 30 days: \$40+	21,056	36.5%	102
<b>Entertainment (Adults)</b>			
Attended movies in last 6 months	30,933	53.6%	91
Went to live theater in last 12 months	6,138	10.6%	80
Went to a bar/night club in last 12 months	10,792	18.7%	98
Dined out in last 12 months	24,528	42.5%	86
Gambled at a casino in last 12 months	7,602	13.2%	82
Visited a theme park in last 12 months	9,472	16.4%	76
DVDs rented in last 30 days: 1	1,265	2.2%	83
DVDs rented in last 30 days: 2	2,347	4.1%	88
DVDs rented in last 30 days: 3	1,627	2.8%	88
DVDs rented in last 30 days: 4	1,824	3.2%	82
DVDs rented in last 30 days: 5+	7,441	12.9%	97
DVDs purchased in last 30 days: 1	2,651	4.6%	92
DVDs purchased in last 30 days: 2	2,404	4.2%	88
DVDs purchased in last 30 days: 3-4	2,573	4.5%	97
DVDs purchased in last 30 days: 5+	3,216	5.6%	108
Spent on toys/games in last 12 months: <\$50	3,607	6.2%	103
Spent on toys/games in last 12 months: \$50-\$99	1,543	2.7%	97
Spent on toys/games in last 12 months: \$100-\$199	3,812	6.6%	92
Spent on toys/games in last 12 months: \$200-\$499	5,956	10.3%	96
Spent on toys/games in last 12 months: \$500+	2,727	4.7%	83
<b>Financial (Adults)</b>			
Have home mortgage (1st)	8,141	14.1%	74
Used ATM/cash machine in last 12 months	24,552	42.5%	84
Own any stock	4,528	7.8%	85
Own U.S. savings bond	2,819	4.9%	72
Own shares in mutual fund (stock)	4,395	7.6%	81
Own shares in mutual fund (bonds)	2,981	5.2%	87
Used full service brokerage firm in last 12 months	3,340	5.8%	93
Have savings account	18,042	31.2%	86
Have 401K retirement savings	7,168	12.4%	70
Did banking over the Internet in last 12 months	11,410	19.8%	72
Own any credit/debit card (in own name)	37,382	64.7%	88
Avg monthly credit card expenditures: <\$111	8,176	14.2%	103
Avg monthly credit card expenditures: \$111-225	3,697	6.4%	83
Avg monthly credit card expenditures: \$226-450	3,701	6.4%	86
Avg monthly credit card expenditures: \$451-700	2,708	4.7%	74
Avg monthly credit card expenditures: \$701+	5,967	10.3%	77

**Data Note:** An MPI (Market Potential Index) measures the relative likelihood of the adults in the specified trade area to exhibit certain consumer behavior or purchasing patterns compared to the U.S. An MPI of 100 represents the U.S. average.

**Source:** These data are based upon national propensities to use various products and services, applied to local demographic composition. Usage data were collected by GfK MRI in a nationally representative survey of U.S. households. Esri forecasts for 2012 and 2017.



## Retail Market Potential

Pete Hollis Site  
 29601 (Greenville), SC  
 Ring: 3 mile radius

Supermarket Site Comparisons  
 Latitude: 34.85892  
 Longitude: -82.40531

Product/Consumer Behavior	Expected Number Adults/HHs	Percent of Adults/HHs	MPI
<b>Grocery (Adults)</b>			
Used beef (fresh/frozen) in last 6 months	40,878	70.8%	100
Used bread in last 6 months	56,015	97.0%	101
Used chicken/turkey (fresh or frozen) in last 6 months	44,035	76.2%	99
Used fish/seafood (fresh or frozen) in last 6 months	29,121	50.4%	96
Used fresh fruit/vegetables in last 6 months	50,021	86.6%	99
Used fresh milk in last 6 months	52,010	90.0%	99
<b>Health (Adults)</b>			
Exercise at home 2+ times per week	15,057	26.1%	87
Exercise at club 2+ times per week	5,942	10.3%	83
Visited a doctor in last 12 months	43,971	76.1%	98
Used vitamin/dietary supplement in last 6 months	26,272	45.5%	94
<b>Home (Households)</b>			
Any home improvement in last 12 months	8,112	27.4%	87
Used housekeeper/maid/prof HH cleaning service in the last 12	3,764	12.7%	81
Purchased any HH furnishing in last 12 months	7,920	26.7%	89
Purchased bedding/bath goods in last 12 months	15,298	51.6%	94
Purchased cooking/serving product in last 12 months	7,917	26.7%	97
Bought any kitchen appliance in last 12 months	4,968	16.8%	96
<b>Insurance (Adults)</b>			
Currently carry any life insurance	24,132	41.8%	88
Have medical/hospital/accident insurance	38,211	66.2%	92
Carry homeowner insurance	24,681	42.7%	82
Carry renter insurance	4,107	7.1%	115
Have auto/other vehicle insurance	44,050	76.3%	92
<b>Pets (Households)</b>			
HH owns any pet	12,730	42.9%	84
HH owns any cat	6,138	20.7%	86
HH owns any dog	9,752	32.9%	87
<b>Reading Materials (Adults)</b>			
Bought book in last 12 months	24,950	43.2%	86
Read any daily newspaper	24,477	42.4%	103
Heavy magazine reader	11,390	19.7%	99
<b>Restaurants (Adults)</b>			
Went to family restaurant/steak house in last 6 mo	37,883	65.6%	91
Went to family restaurant/steak house last mo: <2 times	13,707	23.7%	93
Went to family restaurant/steak house last mo: 2-4 times	13,974	24.2%	90
Went to family restaurant/steak house last mo: 5+ times	10,210	17.7%	91
Went to fast food/drive-in restaurant in last 6 mo	49,665	86.0%	97
Went to fast food/drive-in restaurant <6 times/mo	19,784	34.3%	98
Went to fast food/drive-in restaurant 6-13 times/mo	15,452	26.8%	93
Went to fast food/drive-in restaurant 14+ times/mo	14,434	25.0%	101
Fast food/drive-in last 6 mo: eat in	19,271	33.4%	89
Fast food/drive-in last 6 mo: home delivery	5,576	9.7%	93
Fast food/drive-in last 6 mo: take-out/drive-thru	28,486	49.3%	95
Fast food/drive-in last 6 mo: take-out/walk-in	13,648	23.6%	96

**Data Note:** An MPI (Market Potential Index) measures the relative likelihood of the adults in the specified trade area to exhibit certain consumer behavior or purchasing patterns compared to the U.S. An MPI of 100 represents the U.S. average.

**Source:** These data are based upon national propensities to use various products and services, applied to local demographic composition. Usage data were collected by GfK MRI in a nationally representative survey of U.S. households. Esri forecasts for 2012 and 2017.



## Retail Market Potential

Pete Hollis Site  
 29601 (Greenville), SC  
 Ring: 3 mile radius

Supermarket Site Comparisons  
 Latitude: 34.85892  
 Longitude: -82.40531

Product/Consumer Behavior	Expected Number Adults/HHs	Percent of Adults/HHs	MPI
<b>Telephones &amp; Service (Households)</b>			
HH owns in-home cordless telephone	16,370	55.2%	86
HH average monthly long distance phone bill: <\$16	7,087	23.9%	87
HH average monthly long distance phone bill: \$16-25	2,761	9.3%	81
HH average monthly long distance phone bill: \$26-59	2,188	7.4%	80
HH average monthly long distance phone bill: \$60+	1,246	4.2%	94
<b>Television &amp; Sound Equipment (Adults/Households)</b>			
HH owns 1 TV	6,980	23.5%	119
HH owns 2 TVs	7,987	26.9%	102
HH owns 3 TVs	6,253	21.1%	94
HH owns 4+ TVs	5,169	17.4%	83
HH subscribes to cable TV	17,525	59.1%	102
HH Purchased audio equipment in last 12 months	2,864	9.7%	99
HH Purchased CD player in last 12 months	1,112	3.8%	97
HH Purchased DVD player in last 12 months	2,944	9.9%	102
HH Purchased MP3 player in last 12 months	4,969	8.6%	84
HH Purchased video game system in last 12 months	2,740	9.2%	86
<b>Travel (Adults)</b>			
Domestic travel in last 12 months	24,515	42.4%	81
Took 3+ domestic trips in last 12 months	6,089	10.5%	71
Spent on domestic vacations last 12 mo: <\$1000	5,940	10.3%	82
Spent on domestic vacations last 12 mo: \$1000-\$1499	3,032	5.2%	78
Spent on domestic vacations last 12 mo: \$1500-\$1999	1,945	3.4%	82
Spent on domestic vacations last 12 mo: \$2000-\$2999	2,142	3.7%	89
Spent on domestic vacations last 12 mo: \$3000+	2,244	3.9%	77
Foreign travel in last 3 years	10,786	18.7%	72
Took 3+ foreign trips by plane in last 3 years	1,937	3.4%	69
Spent on foreign vacations last 12 mo: <\$1000	3,031	5.2%	88
Spent on foreign vacations last 12 mo: \$1000-\$2999	2,015	3.5%	85
Spent on foreign vacations last 12 mo: \$3000+	2,122	3.7%	74
Stayed 1+ nights at hotel/motel in last 12 months	18,862	32.7%	81

**Data Note:** An MPI (Market Potential Index) measures the relative likelihood of the adults in the specified trade area to exhibit certain consumer behavior or purchasing patterns compared to the U.S. An MPI of 100 represents the U.S. average.

**Source:** These data are based upon national propensities to use various products and services, applied to local demographic composition. Usage data were collected by GfK MRI in a nationally representative survey of U.S. households. Esri forecasts for 2012 and 2017.



## Retail Market Potential

Pete Hollis Site  
29601 (Greenville), SC  
Ring: 5 mile radius

Supermarket Site Comparisons  
Latitude: 34.85892  
Longitude: -82.40531

Demographic Summary	2012	2017
Population	145,546	158,823
Population 18+	114,173	124,959
Households	60,399	65,827
Median Household Income	\$34,021	\$39,170

Product/Consumer Behavior	Expected Number Adults/HHs	Percent of Adults/HHs	MPI
<b>Apparel (Adults)</b>			
Bought any men's apparel in last 12 months	52,932	46.4%	93
Bought any women's apparel in last 12 months	50,245	44.0%	97
Bought apparel for child <13 in last 6 months	31,161	27.3%	96
Bought any shoes in last 12 months	57,691	50.5%	97
Bought costume jewelry in last 12 months	23,808	20.9%	100
Bought any fine jewelry in last 12 months	26,059	22.8%	104
Bought a watch in last 12 months	23,030	20.2%	104
<b>Automobiles (Households)</b>			
HH owns/leases any vehicle	49,609	82.1%	96
HH bought/leased new vehicle last 12 mo	4,502	7.5%	78
<b>Automotive Aftermarket (Adults)</b>			
Bought gasoline in last 6 months	95,435	83.6%	96
Bought/changed motor oil in last 12 months	60,107	52.6%	102
Had tune-up in last 12 months	33,097	29.0%	93
<b>Beverages (Adults)</b>			
Drank bottled water/seltzer in last 6 months	66,478	58.2%	94
Drank regular cola in last 6 months	61,416	53.8%	106
Drank beer/ale in last 6 months	45,324	39.7%	93
<b>Cameras &amp; Film (Adults)</b>			
Bought any camera in last 12 months	13,847	12.1%	95
Bought film in last 12 months	21,177	18.5%	98
Bought digital camera in last 12 months	6,777	5.9%	87
Bought memory card for camera in last 12 months	7,152	6.3%	82
<b>Cell Phones/PDAs &amp; Service (Adults)</b>			
Bought cell/mobile phone/PDA in last 12 months	38,954	34.1%	96
Avg monthly cell/mobile phone/PDA bill: \$1-\$49	23,449	20.5%	97
Avg monthly cell/mobile phone/PDA bill: \$50-99	34,941	30.6%	94
Avg monthly cell/mobile phone/PDA bill: \$100+	20,574	18.0%	85
<b>Computers (Households)</b>			
HH owns a personal computer	38,549	63.8%	86
Spent <\$500 on most recent home PC purchase	4,895	8.1%	94
Spent \$500-\$999 on most recent home PC purchase	9,517	15.8%	88
Spent \$1000-\$1499 on most recent home PC purchase	6,538	10.8%	83
Spent \$1500-\$1999 on most recent home PC purchase	3,614	6.0%	84
Spent \$2000+ on most recent home PC purchase	3,141	5.2%	83

**Data Note:** An MPI (Market Potential Index) measures the relative likelihood of the adults in the specified trade area to exhibit certain consumer behavior or purchasing patterns compared to the U.S. An MPI of 100 represents the U.S. average.

**Source:** These data are based upon national propensities to use various products and services, applied to local demographic composition. Usage data were collected by GfK MRI in a nationally representative survey of U.S. households. Esri forecasts for 2012 and 2017.



# Retail Market Potential

Pete Hollis Site  
 29601 (Greenville), SC  
 Ring: 5 mile radius

Supermarket Site Comparisons  
 Latitude: 34.85892  
 Longitude: -82.40531

Product/Consumer Behavior	Expected Number Adults/HHs	Percent of Adults/HHs	MPI
<b>Convenience Stores (Adults)</b>			
Shopped at convenience store in last 6 months	66,888	58.6%	98
Bought cigarettes at convenience store in last 30 days	21,187	18.6%	120
Bought gas at convenience store in last 30 days	40,864	35.8%	107
Spent at convenience store in last 30 days: <\$20	9,545	8.4%	87
Spent at convenience store in last 30 days: \$20-39	10,574	9.3%	91
Spent at convenience store in last 30 days: \$40+	42,498	37.2%	104
<b>Entertainment (Adults)</b>			
Attended movies in last 6 months	62,018	54.3%	92
Went to live theater in last 12 months	12,667	11.1%	84
Went to a bar/night club in last 12 months	21,282	18.6%	98
Dined out in last 12 months	50,703	44.4%	90
Gambled at a casino in last 12 months	15,906	13.9%	87
Visited a theme park in last 12 months	20,423	17.9%	83
DVDs rented in last 30 days: 1	2,586	2.3%	85
DVDs rented in last 30 days: 2	4,815	4.2%	91
DVDs rented in last 30 days: 3	3,306	2.9%	90
DVDs rented in last 30 days: 4	3,767	3.3%	86
DVDs rented in last 30 days: 5+	14,999	13.1%	99
DVDs purchased in last 30 days: 1	5,082	4.5%	89
DVDs purchased in last 30 days: 2	4,863	4.3%	90
DVDs purchased in last 30 days: 3-4	5,508	4.8%	105
DVDs purchased in last 30 days: 5+	6,000	5.3%	102
Spent on toys/games in last 12 months: <\$50	7,209	6.3%	104
Spent on toys/games in last 12 months: \$50-\$99	3,047	2.7%	97
Spent on toys/games in last 12 months: \$100-\$199	7,618	6.7%	93
Spent on toys/games in last 12 months: \$200-\$499	12,067	10.6%	98
Spent on toys/games in last 12 months: \$500+	5,677	5.0%	87
<b>Financial (Adults)</b>			
Have home mortgage (1st)	17,255	15.1%	79
Used ATM/cash machine in last 12 months	50,808	44.5%	88
Own any stock	9,027	7.9%	86
Own U.S. savings bond	6,098	5.3%	78
Own shares in mutual fund (stock)	9,032	7.9%	84
Own shares in mutual fund (bonds)	5,987	5.2%	89
Used full service brokerage firm in last 12 months	6,665	5.8%	94
Have savings account	37,371	32.7%	90
Have 401K retirement savings	15,606	13.7%	77
Did banking over the Internet in last 12 months	25,088	22.0%	80
Own any credit/debit card (in own name)	77,569	67.9%	92
Avg monthly credit card expenditures: <\$111	16,472	14.4%	105
Avg monthly credit card expenditures: \$111-225	7,791	6.8%	88
Avg monthly credit card expenditures: \$226-450	7,576	6.6%	89
Avg monthly credit card expenditures: \$451-700	5,650	4.9%	78
Avg monthly credit card expenditures: \$701+	12,401	10.9%	81

**Data Note:** An MPI (Market Potential Index) measures the relative likelihood of the adults in the specified trade area to exhibit certain consumer behavior or purchasing patterns compared to the U.S. An MPI of 100 represents the U.S. average.

**Source:** These data are based upon national propensities to use various products and services, applied to local demographic composition. Usage data were collected by GfK MRI in a nationally representative survey of U.S. households. Esri forecasts for 2012 and 2017.



## Retail Market Potential

Pete Hollis Site  
29601 (Greenville), SC  
Ring: 5 mile radius

Supermarket Site Comparisons  
Latitude: 34.85892  
Longitude: -82.40531

Product/Consumer Behavior	Expected Number Adults/HHs	Percent of Adults/HHs	MPI
<b>Grocery (Adults)</b>			
Used beef (fresh/frozen) in last 6 months	81,348	71.3%	101
Used bread in last 6 months	110,655	96.9%	101
Used chicken/turkey (fresh or frozen) in last 6 months	87,235	76.4%	99
Used fish/seafood (fresh or frozen) in last 6 months	57,689	50.5%	96
Used fresh fruit/vegetables in last 6 months	98,764	86.5%	99
Used fresh milk in last 6 months	103,329	90.5%	100
<b>Health (Adults)</b>			
Exercise at home 2+ times per week	31,122	27.3%	91
Exercise at club 2+ times per week	11,979	10.5%	84
Visited a doctor in last 12 months	87,426	76.6%	99
Used vitamin/dietary supplement in last 6 months	53,080	46.5%	96
<b>Home (Households)</b>			
Any home improvement in last 12 months	16,457	27.2%	86
Used housekeeper/maid/prof HH cleaning service in the last 12	8,071	13.4%	85
Purchased any HH furnishing in last 12 months	16,990	28.1%	94
Purchased bedding/bath goods in last 12 months	31,814	52.7%	96
Purchased cooking/serving product in last 12 months	16,398	27.1%	99
Bought any kitchen appliance in last 12 months	10,241	17.0%	97
<b>Insurance (Adults)</b>			
Currently carry any life insurance	50,534	44.3%	93
Have medical/hospital/accident insurance	77,280	67.7%	95
Carry homeowner insurance	52,620	46.1%	88
Carry renter insurance	8,081	7.1%	115
Have auto/other vehicle insurance	90,750	79.5%	96
<b>Pets (Households)</b>			
HH owns any pet	27,258	45.1%	88
HH owns any cat	12,895	21.4%	89
HH owns any dog	20,147	33.4%	89
<b>Reading Materials (Adults)</b>			
Bought book in last 12 months	51,726	45.3%	90
Read any daily newspaper	48,548	42.5%	103
Heavy magazine reader	22,163	19.4%	97
<b>Restaurants (Adults)</b>			
Went to family restaurant/steak house in last 6 mo	77,545	67.9%	94
Went to family restaurant/steak house last mo: <2 times	27,788	24.3%	95
Went to family restaurant/steak house last mo: 2-4 times	28,730	25.2%	93
Went to family restaurant/steak house last mo: 5+ times	21,038	18.4%	95
Went to fast food/drive-in restaurant in last 6 mo	99,979	87.6%	99
Went to fast food/drive-in restaurant <6 times/mo	39,126	34.3%	98
Went to fast food/drive-in restaurant 6-13 times/mo	32,054	28.1%	97
Went to fast food/drive-in restaurant 14+ times/mo	28,806	25.2%	101
Fast food/drive-in last 6 mo: eat in	40,338	35.3%	94
Fast food/drive-in last 6 mo: home delivery	11,590	10.2%	97
Fast food/drive-in last 6 mo: take-out/drive-thru	58,874	51.6%	99
Fast food/drive-in last 6 mo: take-out/walk-in	27,305	23.9%	97

**Data Note:** An MPI (Market Potential Index) measures the relative likelihood of the adults in the specified trade area to exhibit certain consumer behavior or purchasing patterns compared to the U.S. An MPI of 100 represents the U.S. average.

**Source:** These data are based upon national propensities to use various products and services, applied to local demographic composition. Usage data were collected by GfK MRI in a nationally representative survey of U.S. households. Esri forecasts for 2012 and 2017.



## Retail Market Potential

Pete Hollis Site  
 29601 (Greenville), SC  
 Ring: 5 mile radius

Supermarket Site Comparisons  
 Latitude: 34.85892  
 Longitude: -82.40531

Product/Consumer Behavior	Expected Number Adults/HHs	Percent of Adults/HHs	MPI
<b>Telephones &amp; Service (Households)</b>			
HH owns in-home cordless telephone	34,817	57.6%	89
HH average monthly long distance phone bill: <\$16	15,441	25.6%	93
HH average monthly long distance phone bill: \$16-25	5,960	9.9%	86
HH average monthly long distance phone bill: \$26-59	4,758	7.9%	86
HH average monthly long distance phone bill: \$60+	2,654	4.4%	98
<b>Television &amp; Sound Equipment (Adults/Households)</b>			
HH owns 1 TV	13,360	22.1%	112
HH owns 2 TVs	16,570	27.4%	104
HH owns 3 TVs	12,988	21.5%	96
HH owns 4+ TVs	10,654	17.6%	84
HH subscribes to cable TV	35,148	58.2%	100
HH Purchased audio equipment in last 12 months	5,843	9.7%	99
HH Purchased CD player in last 12 months	2,277	3.8%	97
HH Purchased DVD player in last 12 months	5,890	9.8%	100
HH Purchased MP3 player in last 12 months	9,927	8.7%	85
HH Purchased video game system in last 12 months	5,827	9.6%	89
<b>Travel (Adults)</b>			
Domestic travel in last 12 months	51,808	45.4%	87
Took 3+ domestic trips in last 12 months	13,660	12.0%	80
Spent on domestic vacations last 12 mo: <\$1000	12,478	10.9%	87
Spent on domestic vacations last 12 mo: \$1000-\$1499	6,547	5.7%	85
Spent on domestic vacations last 12 mo: \$1500-\$1999	3,939	3.5%	84
Spent on domestic vacations last 12 mo: \$2000-\$2999	4,041	3.5%	85
Spent on domestic vacations last 12 mo: \$3000+	4,646	4.1%	80
Foreign travel in last 3 years	22,609	19.8%	76
Took 3+ foreign trips by plane in last 3 years	3,956	3.5%	72
Spent on foreign vacations last 12 mo: <\$1000	5,884	5.2%	86
Spent on foreign vacations last 12 mo: \$1000-\$2999	3,854	3.4%	82
Spent on foreign vacations last 12 mo: \$3000+	4,468	3.9%	79
Stayed 1+ nights at hotel/motel in last 12 months	40,117	35.1%	87

**Data Note:** An MPI (Market Potential Index) measures the relative likelihood of the adults in the specified trade area to exhibit certain consumer behavior or purchasing patterns compared to the U.S. An MPI of 100 represents the U.S. average.

**Source:** These data are based upon national propensities to use various products and services, applied to local demographic composition. Usage data were collected by GfK MRI in a nationally representative survey of U.S. households. Esri forecasts for 2012 and 2017.



## Retail Market Potential

Pendleton Street Site  
29601 (Greenville), SC  
Ring: 1 mile radius

Supermarket Site Comparisons  
Latitude: 34.84556  
Longitude: -82.42148

Demographic Summary	2012	2017
Population	8,224	8,761
Population 18+	6,378	6,825
Households	3,184	3,411
Median Household Income	\$19,568	\$20,809

Product/Consumer Behavior	Expected Number Adults/HHs	Percent of Adults/HHs	MPI
<b>Apparel (Adults)</b>			
Bought any men's apparel in last 12 months	2,447	38.4%	77
Bought any women's apparel in last 12 months	2,697	42.3%	93
Bought apparel for child <13 in last 6 months	1,914	30.0%	106
Bought any shoes in last 12 months	2,822	44.2%	85
Bought costume jewelry in last 12 months	1,465	23.0%	110
Bought any fine jewelry in last 12 months	1,511	23.7%	108
Bought a watch in last 12 months	1,497	23.5%	121
<b>Automobiles (Households)</b>			
HH owns/leases any vehicle	2,187	68.7%	80
HH bought/leased new vehicle last 12 mo	130	4.1%	43
<b>Automotive Aftermarket (Adults)</b>			
Bought gasoline in last 6 months	4,454	69.8%	81
Bought/changed motor oil in last 12 months	2,989	46.9%	90
Had tune-up in last 12 months	1,551	24.3%	78
<b>Beverages (Adults)</b>			
Drank bottled water/seltzer in last 6 months	3,590	56.3%	91
Drank regular cola in last 6 months	3,972	62.3%	122
Drank beer/ale in last 6 months	2,169	34.0%	80
<b>Cameras &amp; Film (Adults)</b>			
Bought any camera in last 12 months	672	10.5%	82
Bought film in last 12 months	1,067	16.7%	88
Bought digital camera in last 12 months	292	4.6%	67
Bought memory card for camera in last 12 months	339	5.3%	70
<b>Cell Phones/PDAs &amp; Service (Adults)</b>			
Bought cell/mobile phone/PDA in last 12 months	1,932	30.3%	86
Avg monthly cell/mobile phone/PDA bill: \$1-\$49	1,126	17.7%	83
Avg monthly cell/mobile phone/PDA bill: \$50-99	1,680	26.3%	81
Avg monthly cell/mobile phone/PDA bill: \$100+	807	12.7%	60
<b>Computers (Households)</b>			
HH owns a personal computer	1,444	45.4%	61
Spent <\$500 on most recent home PC purchase	212	6.7%	77
Spent \$500-\$999 on most recent home PC purchase	324	10.2%	57
Spent \$1000-\$1499 on most recent home PC purchase	170	5.3%	41
Spent \$1500-\$1999 on most recent home PC purchase	123	3.9%	54
Spent \$2000+ on most recent home PC purchase	133	4.2%	67

**Data Note:** An MPI (Market Potential Index) measures the relative likelihood of the adults in the specified trade area to exhibit certain consumer behavior or purchasing patterns compared to the U.S. An MPI of 100 represents the U.S. average.

**Source:** These data are based upon national propensities to use various products and services, applied to local demographic composition. Usage data were collected by GfK MRI in a nationally representative survey of U.S. households. Esri forecasts for 2012 and 2017.

March 05, 2014



## Retail Market Potential

Pendleton Street Site  
29601 (Greenville), SC  
Ring: 1 mile radius

Supermarket Site Comparisons  
Latitude: 34.84556  
Longitude: -82.42148

Product/Consumer Behavior	Expected Number Adults/HHs	Percent of Adults/HHs	MPI
<b>Convenience Stores (Adults)</b>			
Shopped at convenience store in last 6 months	3,351	52.5%	88
Bought cigarettes at convenience store in last 30 days	1,308	20.5%	133
Bought gas at convenience store in last 30 days	1,948	30.5%	92
Spent at convenience store in last 30 days: <\$20	360	5.6%	59
Spent at convenience store in last 30 days: \$20-39	483	7.6%	75
Spent at convenience store in last 30 days: \$40+	2,197	34.4%	96
<b>Entertainment (Adults)</b>			
Attended movies in last 6 months	3,105	48.7%	83
Went to live theater in last 12 months	459	7.2%	54
Went to a bar/night club in last 12 months	933	14.6%	77
Dined out in last 12 months	1,905	29.9%	61
Gambled at a casino in last 12 months	737	11.6%	72
Visited a theme park in last 12 months	928	14.6%	68
DVDs rented in last 30 days: 1	126	2.0%	74
DVDs rented in last 30 days: 2	206	3.2%	70
DVDs rented in last 30 days: 3	164	2.6%	80
DVDs rented in last 30 days: 4	199	3.1%	81
DVDs rented in last 30 days: 5+	555	8.7%	66
DVDs purchased in last 30 days: 1	281	4.4%	89
DVDs purchased in last 30 days: 2	221	3.5%	73
DVDs purchased in last 30 days: 3-4	289	4.5%	98
DVDs purchased in last 30 days: 5+	411	6.4%	125
Spent on toys/games in last 12 months: <\$50	393	6.2%	102
Spent on toys/games in last 12 months: \$50-\$99	158	2.5%	90
Spent on toys/games in last 12 months: \$100-\$199	414	6.5%	91
Spent on toys/games in last 12 months: \$200-\$499	534	8.4%	78
Spent on toys/games in last 12 months: \$500+	261	4.1%	72
<b>Financial (Adults)</b>			
Have home mortgage (1st)	567	8.9%	46
Used ATM/cash machine in last 12 months	2,098	32.9%	65
Own any stock	412	6.5%	70
Own U.S. savings bond	245	3.8%	56
Own shares in mutual fund (stock)	323	5.1%	54
Own shares in mutual fund (bonds)	251	3.9%	67
Used full service brokerage firm in last 12 months	286	4.5%	72
Have savings account	1,463	22.9%	63
Have 401K retirement savings	563	8.8%	50
Did banking over the Internet in last 12 months	636	10.0%	36
Own any credit/debit card (in own name)	3,318	52.0%	70
Avg monthly credit card expenditures: <\$111	769	12.1%	88
Avg monthly credit card expenditures: \$111-225	312	4.9%	63
Avg monthly credit card expenditures: \$226-450	318	5.0%	67
Avg monthly credit card expenditures: \$451-700	266	4.2%	65
Avg monthly credit card expenditures: \$701+	498	7.8%	58

**Data Note:** An MPI (Market Potential Index) measures the relative likelihood of the adults in the specified trade area to exhibit certain consumer behavior or purchasing patterns compared to the U.S. An MPI of 100 represents the U.S. average.

**Source:** These data are based upon national propensities to use various products and services, applied to local demographic composition. Usage data were collected by GfK MRI in a nationally representative survey of U.S. households. Esri forecasts for 2012 and 2017.

March 05, 2014

Made with Esri Business Analyst



## Retail Market Potential

Pendleton Street Site  
29601 (Greenville), SC  
Ring: 1 mile radius

Supermarket Site Comparisons  
Latitude: 34.84556  
Longitude: -82.42148

Product/Consumer Behavior	Expected Number Adults/HHs	Percent of Adults/HHs	MPI
<b>Grocery (Adults)</b>			
Used beef (fresh/frozen) in last 6 months	4,400	69.0%	98
Used bread in last 6 months	6,168	96.7%	100
Used chicken/turkey (fresh or frozen) in last 6 months	4,862	76.2%	99
Used fish/seafood (fresh or frozen) in last 6 months	3,271	51.3%	97
Used fresh fruit/vegetables in last 6 months	5,321	83.4%	96
Used fresh milk in last 6 months	5,593	87.7%	97
<b>Health (Adults)</b>			
Exercise at home 2+ times per week	1,407	22.1%	74
Exercise at club 2+ times per week	466	7.3%	59
Visited a doctor in last 12 months	4,797	75.2%	97
Used vitamin/dietary supplement in last 6 months	2,519	39.5%	81
<b>Home (Households)</b>			
Any home improvement in last 12 months	714	22.4%	71
Used housekeeper/maid/prof HH cleaning service in the last 12	311	9.8%	62
Purchased any HH furnishing in last 12 months	669	21.0%	70
Purchased bedding/bath goods in last 12 months	1,532	48.1%	88
Purchased cooking/serving product in last 12 months	722	22.7%	83
Bought any kitchen appliance in last 12 months	484	15.2%	87
<b>Insurance (Adults)</b>			
Currently carry any life insurance	2,407	37.7%	79
Have medical/hospital/accident insurance	3,771	59.1%	83
Carry homeowner insurance	2,069	32.4%	62
Carry renter insurance	396	6.2%	100
Have auto/other vehicle insurance	4,059	63.6%	77
<b>Pets (Households)</b>			
HH owns any pet	1,066	33.5%	65
HH owns any cat	472	14.8%	62
HH owns any dog	896	28.1%	75
<b>Reading Materials (Adults)</b>			
Bought book in last 12 months	2,218	34.8%	69
Read any daily newspaper	2,452	38.4%	93
Heavy magazine reader	1,467	23.0%	116
<b>Restaurants (Adults)</b>			
Went to family restaurant/steak house in last 6 mo	3,790	59.4%	83
Went to family restaurant/steak house last mo: <2 times	1,461	22.9%	89
Went to family restaurant/steak house last mo: 2-4 times	1,344	21.1%	78
Went to family restaurant/steak house last mo: 5+ times	986	15.5%	80
Went to fast food/drive-in restaurant in last 6 mo	5,419	85.0%	96
Went to fast food/drive-in restaurant <6 times/mo	2,084	32.7%	93
Went to fast food/drive-in restaurant 6-13 times/mo	1,550	24.3%	84
Went to fast food/drive-in restaurant 14+ times/mo	1,787	28.0%	113
Fast food/drive-in last 6 mo: eat in	1,578	24.7%	66
Fast food/drive-in last 6 mo: home delivery	598	9.4%	90
Fast food/drive-in last 6 mo: take-out/drive-thru	2,900	45.5%	87
Fast food/drive-in last 6 mo: take-out/walk-in	1,619	25.4%	103

**Data Note:** An MPI (Market Potential Index) measures the relative likelihood of the adults in the specified trade area to exhibit certain consumer behavior or purchasing patterns compared to the U.S. An MPI of 100 represents the U.S. average.

**Source:** These data are based upon national propensities to use various products and services, applied to local demographic composition. Usage data were collected by GfK MRI in a nationally representative survey of U.S. households. Esri forecasts for 2012 and 2017.

March 05, 2014

Made with Esri Business Analyst



## Retail Market Potential

Pendleton Street Site  
29601 (Greenville), SC  
Ring: 1 mile radius

Supermarket Site Comparisons  
Latitude: 34.84556  
Longitude: -82.42148

Product/Consumer Behavior	Expected Number Adults/HHs	Percent of Adults/HHs	MPI
<b>Telephones &amp; Service (Households)</b>			
HH owns in-home cordless telephone	1,621	50.9%	79
HH average monthly long distance phone bill: <\$16	659	20.7%	75
HH average monthly long distance phone bill: \$16-25	245	7.7%	67
HH average monthly long distance phone bill: \$26-59	200	6.3%	68
HH average monthly long distance phone bill: \$60+	157	4.9%	111
<b>Television &amp; Sound Equipment (Adults/Households)</b>			
HH owns 1 TV	754	23.7%	119
HH owns 2 TVs	826	25.9%	99
HH owns 3 TVs	649	20.4%	91
HH owns 4+ TVs	563	17.7%	85
HH subscribes to cable TV	1,737	54.6%	94
HH Purchased audio equipment in last 12 months	281	8.8%	91
HH Purchased CD player in last 12 months	116	3.6%	94
HH Purchased DVD player in last 12 months	307	9.6%	99
HH Purchased MP3 player in last 12 months	402	6.3%	62
HH Purchased video game system in last 12 months	270	8.5%	79
<b>Travel (Adults)</b>			
Domestic travel in last 12 months	1,841	28.9%	55
Took 3+ domestic trips in last 12 months	262	4.1%	28
Spent on domestic vacations last 12 mo: <\$1000	425	6.7%	53
Spent on domestic vacations last 12 mo: \$1000-\$1499	275	4.3%	64
Spent on domestic vacations last 12 mo: \$1500-\$1999	176	2.8%	67
Spent on domestic vacations last 12 mo: \$2000-\$2999	177	2.8%	67
Spent on domestic vacations last 12 mo: \$3000+	203	3.2%	63
Foreign travel in last 3 years	678	10.6%	41
Took 3+ foreign trips by plane in last 3 years	189	3.0%	61
Spent on foreign vacations last 12 mo: <\$1000	270	4.2%	71
Spent on foreign vacations last 12 mo: \$1000-\$2999	211	3.3%	80
Spent on foreign vacations last 12 mo: \$3000+	206	3.2%	65
Stayed 1+ nights at hotel/motel in last 12 months	1,448	22.7%	56

**Data Note:** An MPI (Market Potential Index) measures the relative likelihood of the adults in the specified trade area to exhibit certain consumer behavior or purchasing patterns compared to the U.S. An MPI of 100 represents the U.S. average.

**Source:** These data are based upon national propensities to use various products and services, applied to local demographic composition. Usage data were collected by GfK MRI in a nationally representative survey of U.S. households. Esri forecasts for 2012 and 2017.

March 05, 2014



## Retail Market Potential

Pendleton Street Site  
29601 (Greenville), SC  
Ring: 3 mile radius

Supermarket Site Comparisons  
Latitude: 34.84556  
Longitude: -82.42148

<b>Demographic Summary</b>	<b>2012</b>	<b>2017</b>
Population	68,129	74,219
Population 18+	52,902	57,804
Households	28,329	30,801
Median Household Income	\$28,164	\$32,193

<b>Product/Consumer Behavior</b>	<b>Expected Number Adults/HHs</b>	<b>Percent of Adults/HHs</b>	<b>MPI</b>
<b>Apparel (Adults)</b>			
Bought any men's apparel in last 12 months	23,146	43.8%	88
Bought any women's apparel in last 12 months	22,603	42.7%	94
Bought apparel for child <13 in last 6 months	14,915	28.2%	99
Bought any shoes in last 12 months	25,763	48.7%	94
Bought costume jewelry in last 12 months	10,878	20.6%	99
Bought any fine jewelry in last 12 months	11,921	22.5%	102
Bought a watch in last 12 months	10,926	20.7%	107
<b>Automobiles (Households)</b>			
HH owns/leases any vehicle	22,392	79.0%	92
HH bought/leased new vehicle last 12 mo	1,853	6.5%	68
<b>Automotive Aftermarket (Adults)</b>			
Bought gasoline in last 6 months	42,503	80.3%	93
Bought/changed motor oil in last 12 months	27,075	51.2%	99
Had tune-up in last 12 months	14,476	27.4%	88
<b>Beverages (Adults)</b>			
Drank bottled water/seltzer in last 6 months	29,627	56.0%	91
Drank regular cola in last 6 months	29,419	55.6%	109
Drank beer/ale in last 6 months	20,049	37.9%	89
<b>Cameras &amp; Film (Adults)</b>			
Bought any camera in last 12 months	6,243	11.8%	92
Bought film in last 12 months	9,608	18.2%	95
Bought digital camera in last 12 months	2,922	5.5%	81
Bought memory card for camera in last 12 months	2,913	5.5%	72
<b>Cell Phones/PDAs &amp; Service (Adults)</b>			
Bought cell/mobile phone/PDA in last 12 months	17,519	33.1%	94
Avg monthly cell/mobile phone/PDA bill: \$1-\$49	10,311	19.5%	92
Avg monthly cell/mobile phone/PDA bill: \$50-99	15,460	29.2%	90
Avg monthly cell/mobile phone/PDA bill: \$100+	8,660	16.4%	77
<b>Computers (Households)</b>			
HH owns a personal computer	16,629	58.7%	79
Spent <\$500 on most recent home PC purchase	2,144	7.6%	87
Spent \$500-\$999 on most recent home PC purchase	4,070	14.4%	80
Spent \$1000-\$1499 on most recent home PC purchase	2,524	8.9%	68
Spent \$1500-\$1999 on most recent home PC purchase	1,577	5.6%	78
Spent \$2000+ on most recent home PC purchase	1,355	4.8%	76

**Data Note:** An MPI (Market Potential Index) measures the relative likelihood of the adults in the specified trade area to exhibit certain consumer behavior or purchasing patterns compared to the U.S. An MPI of 100 represents the U.S. average.

**Source:** These data are based upon national propensities to use various products and services, applied to local demographic composition. Usage data were collected by GfK MRI in a nationally representative survey of U.S. households. Esri forecasts for 2012 and 2017.

March 05, 2014



## Retail Market Potential

Pendleton Street Site  
29601 (Greenville), SC  
Ring: 3 mile radius

Supermarket Site Comparisons  
Latitude: 34.84556  
Longitude: -82.42148

Product/Consumer Behavior	Expected Number Adults/HHs	Percent of Adults/HHs	MPI
<b>Convenience Stores (Adults)</b>			
Shopped at convenience store in last 6 months	30,260	57.2%	95
Bought cigarettes at convenience store in last 30 days	10,740	20.3%	132
Bought gas at convenience store in last 30 days	18,761	35.5%	106
Spent at convenience store in last 30 days: <\$20	3,930	7.4%	77
Spent at convenience store in last 30 days: \$20-39	4,746	9.0%	88
Spent at convenience store in last 30 days: \$40+	19,576	37.0%	104
<b>Entertainment (Adults)</b>			
Attended movies in last 6 months	27,660	52.3%	89
Went to live theater in last 12 months	5,202	9.8%	74
Went to a bar/night club in last 12 months	9,460	17.9%	94
Dined out in last 12 months	21,591	40.8%	83
Gambled at a casino in last 12 months	6,538	12.4%	77
Visited a theme park in last 12 months	8,135	15.4%	71
DVDs rented in last 30 days: 1	1,087	2.1%	77
DVDs rented in last 30 days: 2	1,988	3.8%	81
DVDs rented in last 30 days: 3	1,385	2.6%	82
DVDs rented in last 30 days: 4	1,644	3.1%	81
DVDs rented in last 30 days: 5+	6,547	12.4%	94
DVDs purchased in last 30 days: 1	2,406	4.5%	91
DVDs purchased in last 30 days: 2	2,058	3.9%	82
DVDs purchased in last 30 days: 3-4	2,368	4.5%	97
DVDs purchased in last 30 days: 5+	2,959	5.6%	108
Spent on toys/games in last 12 months: <\$50	3,287	6.2%	102
Spent on toys/games in last 12 months: \$50-\$99	1,379	2.6%	95
Spent on toys/games in last 12 months: \$100-\$199	3,343	6.3%	88
Spent on toys/games in last 12 months: \$200-\$499	5,453	10.3%	96
Spent on toys/games in last 12 months: \$500+	2,447	4.6%	81
<b>Financial (Adults)</b>			
Have home mortgage (1st)	7,175	13.6%	71
Used ATM/cash machine in last 12 months	21,476	40.6%	80
Own any stock	4,009	7.6%	83
Own U.S. savings bond	2,380	4.5%	66
Own shares in mutual fund (stock)	3,776	7.1%	76
Own shares in mutual fund (bonds)	2,572	4.9%	82
Used full service brokerage firm in last 12 months	2,828	5.3%	86
Have savings account	15,809	29.9%	82
Have 401K retirement savings	6,097	11.5%	65
Did banking over the Internet in last 12 months	9,471	17.9%	65
Own any credit/debit card (in own name)	33,191	62.7%	85
Avg monthly credit card expenditures: <\$111	7,379	13.9%	101
Avg monthly credit card expenditures: \$111-225	3,227	6.1%	79
Avg monthly credit card expenditures: \$226-450	3,271	6.2%	83
Avg monthly credit card expenditures: \$451-700	2,424	4.6%	72
Avg monthly credit card expenditures: \$701+	5,051	9.5%	71

**Data Note:** An MPI (Market Potential Index) measures the relative likelihood of the adults in the specified trade area to exhibit certain consumer behavior or purchasing patterns compared to the U.S. An MPI of 100 represents the U.S. average.

**Source:** These data are based upon national propensities to use various products and services, applied to local demographic composition. Usage data were collected by GfK MRI in a nationally representative survey of U.S. households. Esri forecasts for 2012 and 2017.

March 05, 2014

Made with Esri Business Analyst



## Retail Market Potential

Pendleton Street Site  
29601 (Greenville), SC  
Ring: 3 mile radius

Supermarket Site Comparisons  
Latitude: 34.84556  
Longitude: -82.42148

Product/Consumer Behavior	Expected Number Adults/HHs	Percent of Adults/HHs	MPI
<b>Grocery (Adults)</b>			
Used beef (fresh/frozen) in last 6 months	37,738	71.3%	101
Used bread in last 6 months	51,393	97.1%	101
Used chicken/turkey (fresh or frozen) in last 6 months	40,581	76.7%	99
Used fish/seafood (fresh or frozen) in last 6 months	26,681	50.4%	96
Used fresh fruit/vegetables in last 6 months	45,873	86.7%	100
Used fresh milk in last 6 months	47,705	90.2%	100
<b>Health (Adults)</b>			
Exercise at home 2+ times per week	13,422	25.4%	85
Exercise at club 2+ times per week	4,888	9.2%	74
Visited a doctor in last 12 months	40,214	76.0%	98
Used vitamin/dietary supplement in last 6 months	23,507	44.4%	92
<b>Home (Households)</b>			
Any home improvement in last 12 months	7,851	27.7%	88
Used housekeeper/maid/prof HH cleaning service in the last 12	3,523	12.4%	79
Purchased any HH furnishing in last 12 months	7,383	26.1%	87
Purchased bedding/bath goods in last 12 months	14,354	50.7%	93
Purchased cooking/serving product in last 12 months	7,506	26.5%	96
Bought any kitchen appliance in last 12 months	4,707	16.6%	95
<b>Insurance (Adults)</b>			
Currently carry any life insurance	21,729	41.1%	87
Have medical/hospital/accident insurance	34,497	65.2%	91
Carry homeowner insurance	22,475	42.5%	81
Carry renter insurance	3,627	6.9%	111
Have auto/other vehicle insurance	40,144	75.9%	92
<b>Pets (Households)</b>			
HH owns any pet	12,531	44.2%	86
HH owns any cat	6,045	21.3%	89
HH owns any dog	9,846	34.8%	92
<b>Reading Materials (Adults)</b>			
Bought book in last 12 months	22,087	41.8%	83
Read any daily newspaper	21,947	41.5%	101
Heavy magazine reader	10,411	19.7%	99
<b>Restaurants (Adults)</b>			
Went to family restaurant/steak house in last 6 mo	33,862	64.0%	89
Went to family restaurant/steak house last mo: <2 times	12,340	23.3%	91
Went to family restaurant/steak house last mo: 2-4 times	12,581	23.8%	88
Went to family restaurant/steak house last mo: 5+ times	8,951	16.9%	87
Went to fast food/drive-in restaurant in last 6 mo	45,295	85.6%	97
Went to fast food/drive-in restaurant <6 times/mo	18,036	34.1%	98
Went to fast food/drive-in restaurant 6-13 times/mo	13,934	26.3%	91
Went to fast food/drive-in restaurant 14+ times/mo	13,330	25.2%	101
Fast food/drive-in last 6 mo: eat in	17,130	32.4%	86
Fast food/drive-in last 6 mo: home delivery	4,855	9.2%	88
Fast food/drive-in last 6 mo: take-out/drive-thru	25,805	48.8%	94
Fast food/drive-in last 6 mo: take-out/walk-in	12,163	23.0%	94

**Data Note:** An MPI (Market Potential Index) measures the relative likelihood of the adults in the specified trade area to exhibit certain consumer behavior or purchasing patterns compared to the U.S. An MPI of 100 represents the U.S. average.

**Source:** These data are based upon national propensities to use various products and services, applied to local demographic composition. Usage data were collected by GfK MRI in a nationally representative survey of U.S. households. Esri forecasts for 2012 and 2017.

March 05, 2014

Made with Esri Business Analyst



## Retail Market Potential

Pendleton Street Site  
29601 (Greenville), SC  
Ring: 3 mile radius

Supermarket Site Comparisons  
Latitude: 34.84556  
Longitude: -82.42148

Product/Consumer Behavior	Expected Number Adults/HHs	Percent of Adults/HHs	MPI
<b>Telephones &amp; Service (Households)</b>			
HH owns in-home cordless telephone	15,773	55.7%	86
HH average monthly long distance phone bill: <\$16	6,755	23.8%	86
HH average monthly long distance phone bill: \$16-25	2,614	9.2%	81
HH average monthly long distance phone bill: \$26-59	2,046	7.2%	79
HH average monthly long distance phone bill: \$60+	1,206	4.3%	95
<b>Television &amp; Sound Equipment (Adults/Households)</b>			
HH owns 1 TV	6,627	23.4%	118
HH owns 2 TVs	7,577	26.7%	102
HH owns 3 TVs	6,048	21.3%	95
HH owns 4+ TVs	5,074	17.9%	86
HH subscribes to cable TV	16,212	57.2%	98
HH Purchased audio equipment in last 12 months	2,695	9.5%	98
HH Purchased CD player in last 12 months	1,038	3.7%	95
HH Purchased DVD player in last 12 months	2,798	9.9%	102
HH Purchased MP3 player in last 12 months	4,305	8.1%	80
HH Purchased video game system in last 12 months	2,590	9.1%	85
<b>Travel (Adults)</b>			
Domestic travel in last 12 months	21,485	40.6%	78
Took 3+ domestic trips in last 12 months	5,040	9.5%	64
Spent on domestic vacations last 12 mo: <\$1000	5,061	9.6%	76
Spent on domestic vacations last 12 mo: \$1000-\$1499	2,603	4.9%	73
Spent on domestic vacations last 12 mo: \$1500-\$1999	1,712	3.2%	79
Spent on domestic vacations last 12 mo: \$2000-\$2999	1,913	3.6%	87
Spent on domestic vacations last 12 mo: \$3000+	2,010	3.8%	75
Foreign travel in last 3 years	9,094	17.2%	66
Took 3+ foreign trips by plane in last 3 years	1,617	3.1%	63
Spent on foreign vacations last 12 mo: <\$1000	2,669	5.0%	84
Spent on foreign vacations last 12 mo: \$1000-\$2999	1,742	3.3%	80
Spent on foreign vacations last 12 mo: \$3000+	1,794	3.4%	68
Stayed 1+ nights at hotel/motel in last 12 months	16,330	30.9%	76

**Data Note:** An MPI (Market Potential Index) measures the relative likelihood of the adults in the specified trade area to exhibit certain consumer behavior or purchasing patterns compared to the U.S. An MPI of 100 represents the U.S. average.

**Source:** These data are based upon national propensities to use various products and services, applied to local demographic composition. Usage data were collected by GfK MRI in a nationally representative survey of U.S. households. Esri forecasts for 2012 and 2017.

March 05, 2014



## Retail Market Potential

Pendleton Street Site  
29601 (Greenville), SC  
Ring: 5 mile radius

Supermarket Site Comparisons  
Latitude: 34.84556  
Longitude: -82.42148

<b>Demographic Summary</b>	<b>2012</b>	<b>2017</b>
Population	142,927	155,432
Population 18+	111,219	121,284
Households	58,240	63,219
Median Household Income	\$32,697	\$37,834

<b>Product/Consumer Behavior</b>	<b>Expected Number Adults/HHs</b>	<b>Percent of Adults/HHs</b>	<b>MPI</b>
<b>Apparel (Adults)</b>			
Bought any men's apparel in last 12 months	51,084	45.9%	92
Bought any women's apparel in last 12 months	48,690	43.8%	96
Bought apparel for child <13 in last 6 months	30,972	27.8%	98
Bought any shoes in last 12 months	55,870	50.2%	97
Bought costume jewelry in last 12 months	23,094	20.8%	100
Bought any fine jewelry in last 12 months	25,398	22.8%	104
Bought a watch in last 12 months	22,628	20.3%	105
<b>Automobiles (Households)</b>			
HH owns/leases any vehicle	47,655	81.8%	95
HH bought/leased new vehicle last 12 mo	4,166	7.2%	74
<b>Automotive Aftermarket (Adults)</b>			
Bought gasoline in last 6 months	92,658	83.3%	96
Bought/changed motor oil in last 12 months	58,896	53.0%	102
Had tune-up in last 12 months	31,929	28.7%	92
<b>Beverages (Adults)</b>			
Drank bottled water/seltzer in last 6 months	64,259	57.8%	93
Drank regular cola in last 6 months	60,643	54.5%	107
Drank beer/ale in last 6 months	43,348	39.0%	92
<b>Cameras &amp; Film (Adults)</b>			
Bought any camera in last 12 months	13,501	12.1%	95
Bought film in last 12 months	20,697	18.6%	98
Bought digital camera in last 12 months	6,402	5.8%	84
Bought memory card for camera in last 12 months	6,786	6.1%	80
<b>Cell Phones/PDAs &amp; Service (Adults)</b>			
Bought cell/mobile phone/PDA in last 12 months	37,902	34.1%	96
Avg monthly cell/mobile phone/PDA bill: \$1-\$49	22,682	20.4%	96
Avg monthly cell/mobile phone/PDA bill: \$50-99	33,757	30.4%	94
Avg monthly cell/mobile phone/PDA bill: \$100+	19,887	17.9%	84
<b>Computers (Households)</b>			
HH owns a personal computer	36,469	62.6%	84
Spent <\$500 on most recent home PC purchase	4,687	8.0%	93
Spent \$500-\$999 on most recent home PC purchase	9,020	15.5%	87
Spent \$1000-\$1499 on most recent home PC purchase	6,005	10.3%	79
Spent \$1500-\$1999 on most recent home PC purchase	3,370	5.8%	81
Spent \$2000+ on most recent home PC purchase	2,914	5.0%	80

**Data Note:** An MPI (Market Potential Index) measures the relative likelihood of the adults in the specified trade area to exhibit certain consumer behavior or purchasing patterns compared to the U.S. An MPI of 100 represents the U.S. average.

**Source:** These data are based upon national propensities to use various products and services, applied to local demographic composition. Usage data were collected by GfK MRI in a nationally representative survey of U.S. households. Esri forecasts for 2012 and 2017.

March 05, 2014



## Retail Market Potential

Pendleton Street Site  
29601 (Greenville), SC  
Ring: 5 mile radius

Supermarket Site Comparisons  
Latitude: 34.84556  
Longitude: -82.42148

Product/Consumer Behavior	Expected Number Adults/HHs	Percent of Adults/HHs	MPI
<b>Convenience Stores (Adults)</b>			
Shopped at convenience store in last 6 months	65,060	58.5%	97
Bought cigarettes at convenience store in last 30 days	21,323	19.2%	124
Bought gas at convenience store in last 30 days	40,174	36.1%	108
Spent at convenience store in last 30 days: <\$20	8,947	8.0%	83
Spent at convenience store in last 30 days: \$20-39	10,204	9.2%	90
Spent at convenience store in last 30 days: \$40+	41,825	37.6%	105
<b>Entertainment (Adults)</b>			
Attended movies in last 6 months	59,588	53.6%	91
Went to live theater in last 12 months	11,665	10.5%	79
Went to a bar/night club in last 12 months	20,340	18.3%	96
Dined out in last 12 months	48,162	43.3%	88
Gambled at a casino in last 12 months	14,978	13.5%	84
Visited a theme park in last 12 months	19,330	17.4%	81
DVDs rented in last 30 days: 1	2,447	2.2%	83
DVDs rented in last 30 days: 2	4,580	4.1%	89
DVDs rented in last 30 days: 3	3,144	2.8%	88
DVDs rented in last 30 days: 4	3,593	3.2%	84
DVDs rented in last 30 days: 5+	14,442	13.0%	98
DVDs purchased in last 30 days: 1	4,965	4.5%	90
DVDs purchased in last 30 days: 2	4,652	4.2%	88
DVDs purchased in last 30 days: 3-4	5,394	4.9%	105
DVDs purchased in last 30 days: 5+	5,942	5.3%	103
Spent on toys/games in last 12 months: <\$50	6,979	6.3%	103
Spent on toys/games in last 12 months: \$50-\$99	3,022	2.7%	99
Spent on toys/games in last 12 months: \$100-\$199	7,389	6.6%	93
Spent on toys/games in last 12 months: \$200-\$499	11,781	10.6%	98
Spent on toys/games in last 12 months: \$500+	5,467	4.9%	86
<b>Financial (Adults)</b>			
Have home mortgage (1st)	16,228	14.6%	76
Used ATM/cash machine in last 12 months	48,377	43.5%	86
Own any stock	8,334	7.5%	82
Own U.S. savings bond	5,634	5.1%	74
Own shares in mutual fund (stock)	8,294	7.5%	79
Own shares in mutual fund (bonds)	5,529	5.0%	84
Used full service brokerage firm in last 12 months	6,110	5.5%	88
Have savings account	35,403	31.8%	88
Have 401K retirement savings	14,593	13.1%	74
Did banking over the Internet in last 12 months	23,224	20.9%	76
Own any credit/debit card (in own name)	73,983	66.5%	90
Avg monthly credit card expenditures: <\$111	16,034	14.4%	105
Avg monthly credit card expenditures: \$111-225	7,369	6.6%	86
Avg monthly credit card expenditures: \$226-450	7,178	6.5%	86
Avg monthly credit card expenditures: \$451-700	5,352	4.8%	75
Avg monthly credit card expenditures: \$701+	11,230	10.1%	75

**Data Note:** An MPI (Market Potential Index) measures the relative likelihood of the adults in the specified trade area to exhibit certain consumer behavior or purchasing patterns compared to the U.S. An MPI of 100 represents the U.S. average.

**Source:** These data are based upon national propensities to use various products and services, applied to local demographic composition. Usage data were collected by GfK MRI in a nationally representative survey of U.S. households. Esri forecasts for 2012 and 2017.

March 05, 2014



## Retail Market Potential

Pendleton Street Site  
29601 (Greenville), SC  
Ring: 5 mile radius

Supermarket Site Comparisons  
Latitude: 34.84556  
Longitude: -82.42148

Product/Consumer Behavior	Expected Number Adults/HHs	Percent of Adults/HHs	MPI
<b>Grocery (Adults)</b>			
Used beef (fresh/frozen) in last 6 months	79,419	71.4%	101
Used bread in last 6 months	107,840	97.0%	101
Used chicken/turkey (fresh or frozen) in last 6 months	84,991	76.4%	99
Used fish/seafood (fresh or frozen) in last 6 months	55,956	50.3%	95
Used fresh fruit/vegetables in last 6 months	96,235	86.5%	99
Used fresh milk in last 6 months	100,775	90.6%	100
<b>Health (Adults)</b>			
Exercise at home 2+ times per week	29,583	26.6%	89
Exercise at club 2+ times per week	11,015	9.9%	80
Visited a doctor in last 12 months	84,759	76.2%	98
Used vitamin/dietary supplement in last 6 months	50,954	45.8%	94
<b>Home (Households)</b>			
Any home improvement in last 12 months	15,717	27.0%	86
Used housekeeper/maid/prof HH cleaning service in the last 12	7,512	12.9%	82
Purchased any HH furnishing in last 12 months	16,098	27.6%	92
Purchased bedding/bath goods in last 12 months	30,453	52.3%	96
Purchased cooking/serving product in last 12 months	15,808	27.1%	99
Bought any kitchen appliance in last 12 months	9,813	16.8%	97
<b>Insurance (Adults)</b>			
Currently carry any life insurance	48,581	43.7%	92
Have medical/hospital/accident insurance	74,512	67.0%	94
Carry homeowner insurance	50,720	45.6%	87
Carry renter insurance	7,691	6.9%	112
Have auto/other vehicle insurance	87,981	79.1%	96
<b>Pets (Households)</b>			
HH owns any pet	26,401	45.3%	88
HH owns any cat	12,454	21.4%	89
HH owns any dog	19,766	33.9%	90
<b>Reading Materials (Adults)</b>			
Bought book in last 12 months	49,285	44.3%	88
Read any daily newspaper	46,631	41.9%	102
Heavy magazine reader	21,663	19.5%	98
<b>Restaurants (Adults)</b>			
Went to family restaurant/steak house in last 6 mo	74,530	67.0%	93
Went to family restaurant/steak house last mo: <2 times	26,769	24.1%	94
Went to family restaurant/steak house last mo: 2-4 times	27,584	24.8%	92
Went to family restaurant/steak house last mo: 5+ times	20,187	18.2%	94
Went to fast food/drive-in restaurant in last 6 mo	97,046	87.3%	99
Went to fast food/drive-in restaurant <6 times/mo	37,828	34.0%	97
Went to fast food/drive-in restaurant 6-13 times/mo	31,019	27.9%	97
Went to fast food/drive-in restaurant 14+ times/mo	28,208	25.4%	102
Fast food/drive-in last 6 mo: eat in	38,738	34.8%	93
Fast food/drive-in last 6 mo: home delivery	11,087	10.0%	96
Fast food/drive-in last 6 mo: take-out/drive-thru	57,152	51.4%	99
Fast food/drive-in last 6 mo: take-out/walk-in	26,384	23.7%	97

**Data Note:** An MPI (Market Potential Index) measures the relative likelihood of the adults in the specified trade area to exhibit certain consumer behavior or purchasing patterns compared to the U.S. An MPI of 100 represents the U.S. average.

**Source:** These data are based upon national propensities to use various products and services, applied to local demographic composition. Usage data were collected by GfK MRI in a nationally representative survey of U.S. households. Esri forecasts for 2012 and 2017.

March 05, 2014

Made with Esri Business Analyst



## Retail Market Potential

Pendleton Street Site  
29601 (Greenville), SC  
Ring: 5 mile radius

Supermarket Site Comparisons  
Latitude: 34.84556  
Longitude: -82.42148

Product/Consumer Behavior	Expected Number Adults/HHs	Percent of Adults/HHs	MPI
<b>Telephones &amp; Service (Households)</b>			
HH owns in-home cordless telephone	33,321	57.2%	89
HH average monthly long distance phone bill: <\$16	14,667	25.2%	91
HH average monthly long distance phone bill: \$16-25	5,667	9.7%	85
HH average monthly long distance phone bill: \$26-59	4,458	7.7%	83
HH average monthly long distance phone bill: \$60+	2,574	4.4%	99
<b>Television &amp; Sound Equipment (Adults/Households)</b>			
HH owns 1 TV	12,921	22.2%	112
HH owns 2 TVs	15,891	27.3%	104
HH owns 3 TVs	12,572	21.6%	97
HH owns 4+ TVs	10,269	17.6%	84
HH subscribes to cable TV	33,268	57.1%	98
HH Purchased audio equipment in last 12 months	5,647	9.7%	99
HH Purchased CD player in last 12 months	2,200	3.8%	98
HH Purchased DVD player in last 12 months	5,705	9.8%	101
HH Purchased MP3 player in last 12 months	9,433	8.5%	83
HH Purchased video game system in last 12 months	5,544	9.5%	88
<b>Travel (Adults)</b>			
Domestic travel in last 12 months	48,792	43.9%	84
Took 3+ domestic trips in last 12 months	12,465	11.2%	75
Spent on domestic vacations last 12 mo: <\$1000	11,694	10.5%	83
Spent on domestic vacations last 12 mo: \$1000-\$1499	6,134	5.5%	82
Spent on domestic vacations last 12 mo: \$1500-\$1999	3,679	3.3%	81
Spent on domestic vacations last 12 mo: \$2000-\$2999	3,839	3.5%	83
Spent on domestic vacations last 12 mo: \$3000+	4,300	3.9%	76
Foreign travel in last 3 years	20,840	18.7%	72
Took 3+ foreign trips by plane in last 3 years	3,609	3.2%	67
Spent on foreign vacations last 12 mo: <\$1000	5,527	5.0%	83
Spent on foreign vacations last 12 mo: \$1000-\$2999	3,591	3.2%	78
Spent on foreign vacations last 12 mo: \$3000+	4,116	3.7%	74
Stayed 1+ nights at hotel/motel in last 12 months	37,837	34.0%	84

**Data Note:** An MPI (Market Potential Index) measures the relative likelihood of the adults in the specified trade area to exhibit certain consumer behavior or purchasing patterns compared to the U.S. An MPI of 100 represents the U.S. average.

**Source:** These data are based upon national propensities to use various products and services, applied to local demographic composition. Usage data were collected by GfK MRI in a nationally representative survey of U.S. households. Esri forecasts for 2012 and 2017.

March 05, 2014