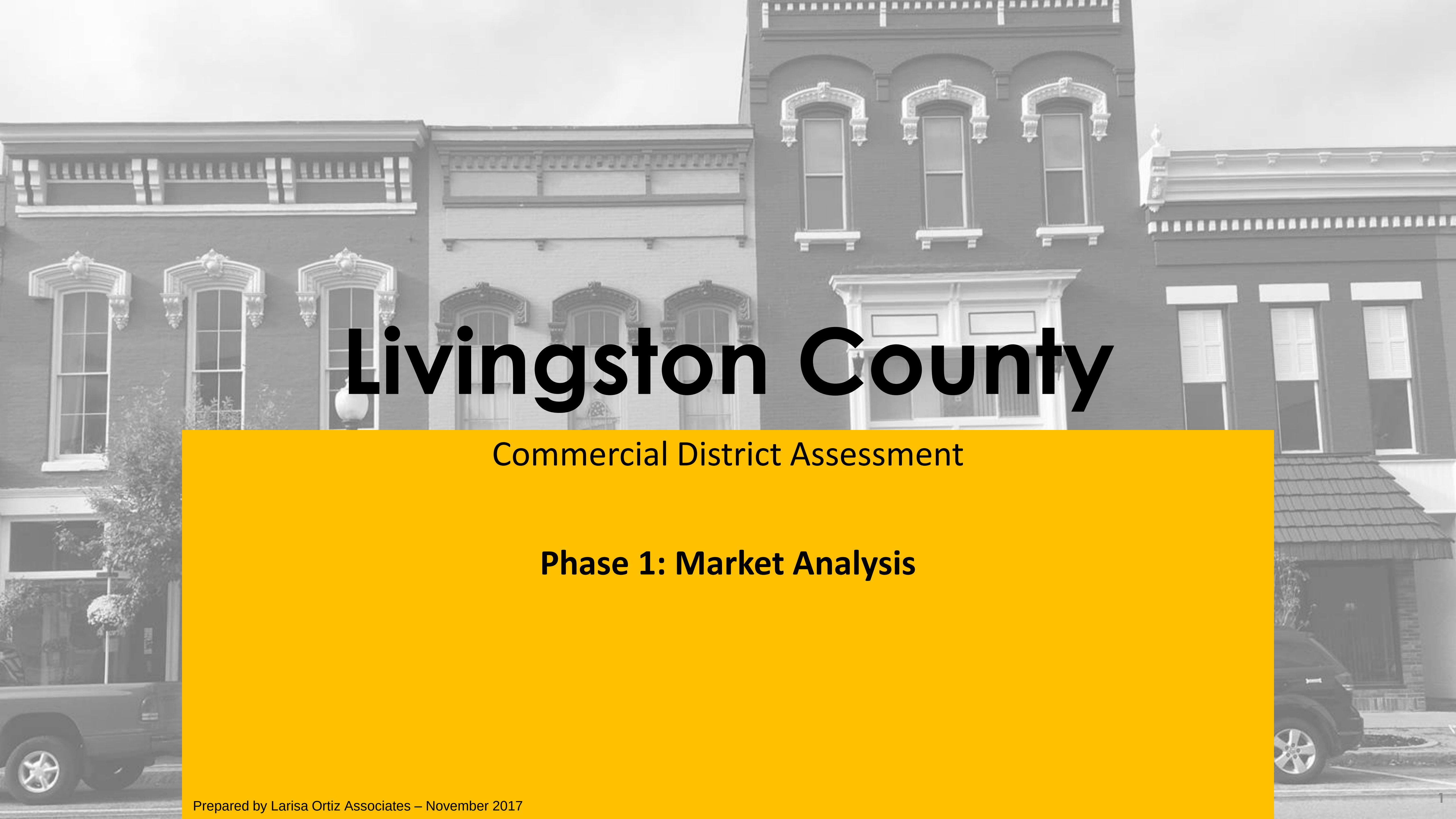


Livingston County

Commercial District Assessment

Phase 1: Market Analysis

Prepared by Larisa Ortiz Associates – November 2017

PROJECT PROCESS

Background Document Review

Sep - Oct

- ABC Community Revitalization Plan
- NYS Downtown Revitalization Initiative Application
- Finger Lakes Visitor Study 2016
- Economic Development Strategic Plan
- Downtown Partnership Sign and Façade program documents

Site Visit + Community Meetings

Oct

- Chamber of Commerce
- County Tourism
- Elected Officials
- Letchworth Gateway Initiative
- Property Owners
- Business Owners
- Local institution representatives
- Residents

Market Analysis

Oct - Nov

- County-Wide
- District-Level

Community meeting in Dansville on October 12th 2017.
Photo: LOA

Community meeting in Geneseo on October 12th 2017.
Photo: LOA

PROJECT OBJECTIVES

Mount Morris, NY.
Photo: LOA

Livonia, NY.
Photo: LOA

1 Conduct a retail market analysis for Livingston County and nine of its downtowns

Based on market conditions:

2 Determine where the County should encourage and/or incentivize new retail and targeted investment and development

3 Determine what kinds of physical improvements and downtown projects should be prioritized by the County

1 County- Wide

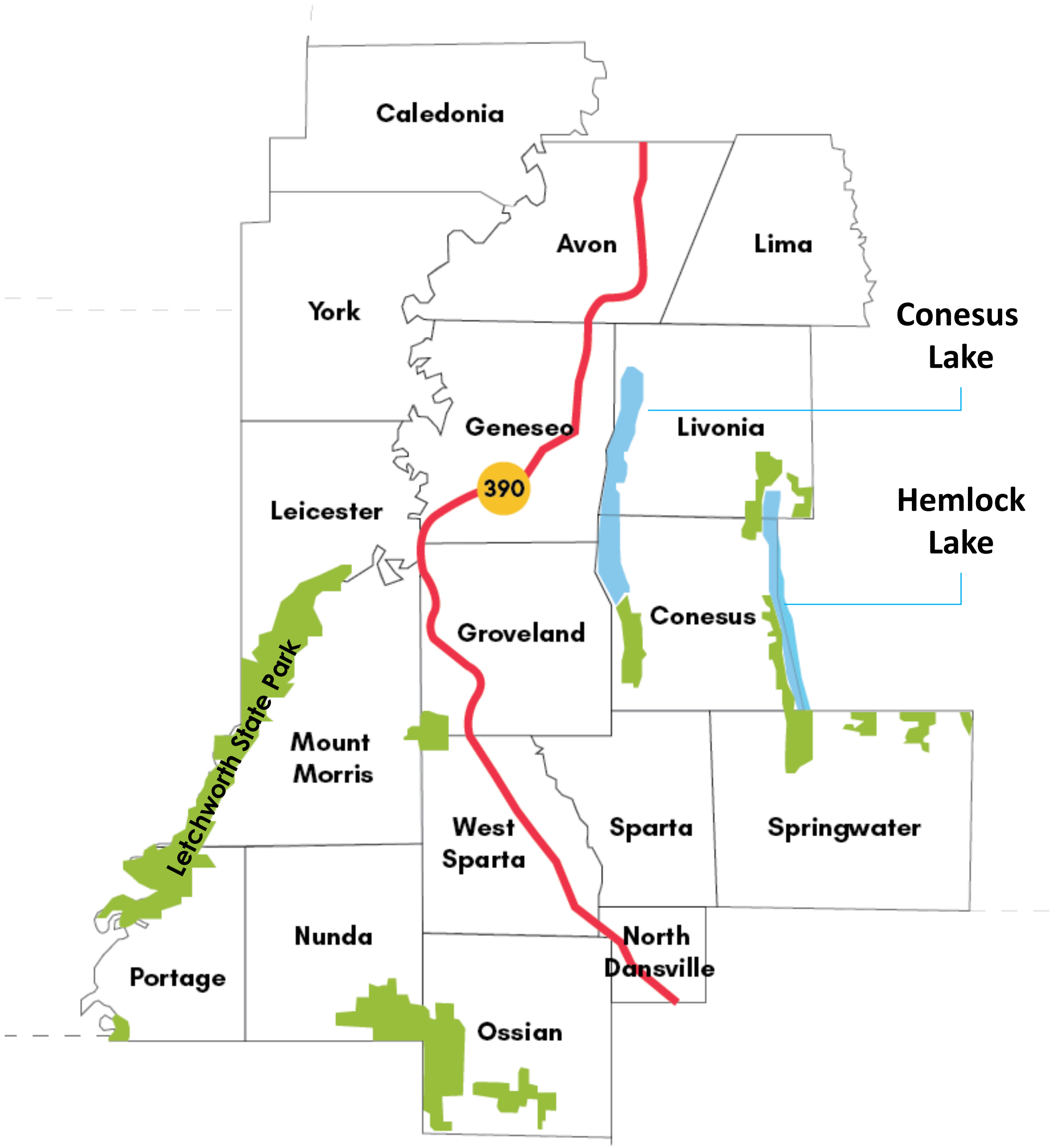
- Physical Environment
- Administrative Capacity
- Business Environment
- Demographics + Psychographics
- Retail Leakage

2 District- Wide

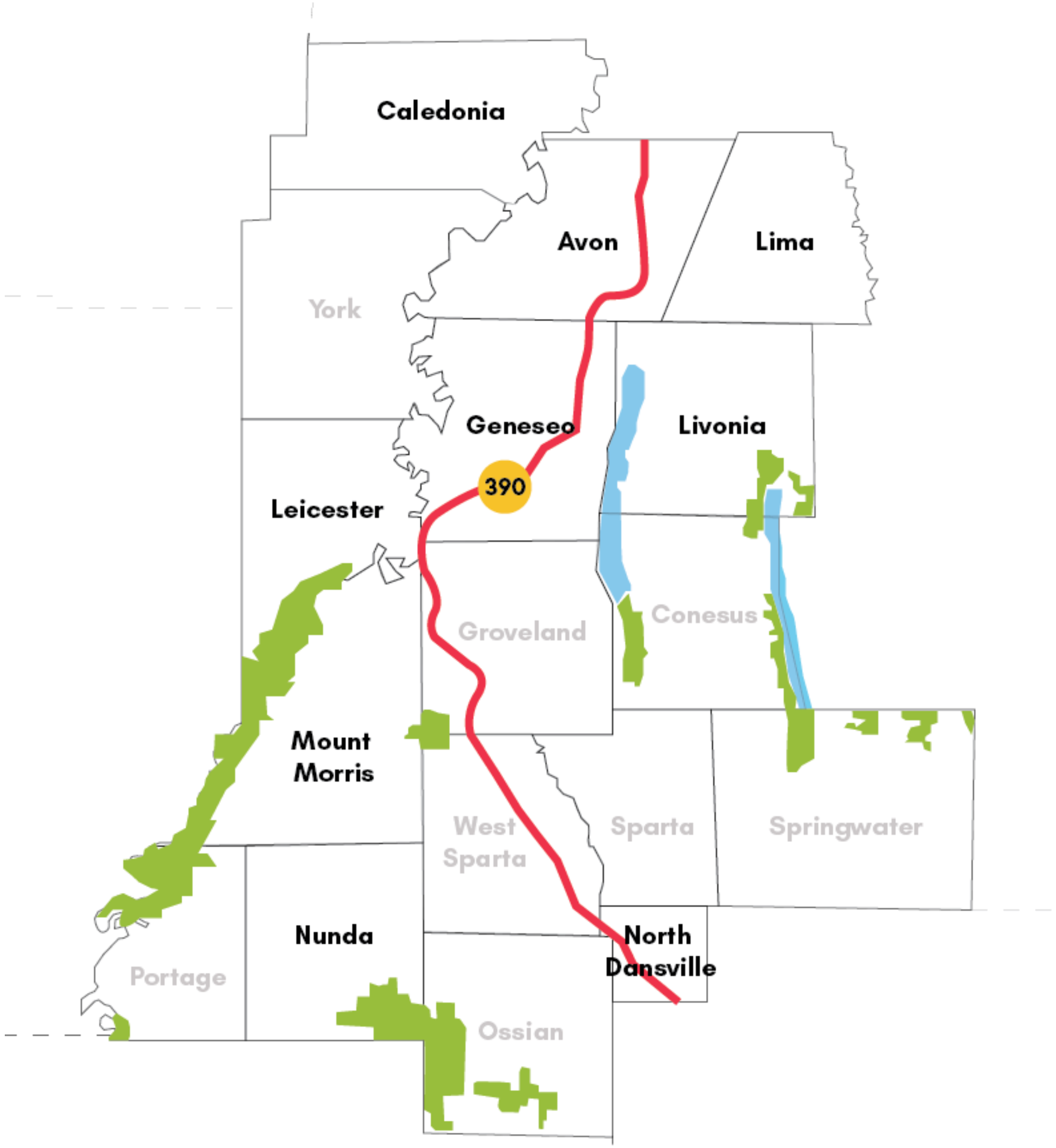
- Physical Environment
- Administrative Capacity
- Business Environment
- Demographics + Psychographics
- Retail Leakage

3 Recommendation Outline

Caledonia, NY.
Photo: LOA



COUNTY



DISTRICTS

Source: LOA

Prepared by Larisa Ortiz Associates – November 2017

County-Wide Analysis

Physical Environment

Administrative Capacity

Business Environment

Demographics + Psychographics

Retail Leakage

Restored historic facades

There is a strong sense of history and tradition in the architecture of buildings downtown that make a pedestrian-friendly environment.

Mount Morris, NY.
Photo: LOA

Caledonia, NY.
Photo: LOA

When asked to describe what they liked about downtowns, many stakeholders cited

‘quaint’,
‘historic’
‘nostalgic’
‘sense of tradition’

as key qualities

Proximity to natural assets

Source: Livingston County Chamber of Commerce & Tourism

Many downtowns are located within a short drive of Letchworth State Park and the Finger Lakes and therefore may benefit from visitors passing thru.

State Parks

(within 5 minute drive)

- Mount Morris
- Leicester
- Nunda
- Dansville

(within 15 minute drive)

- Geneseo

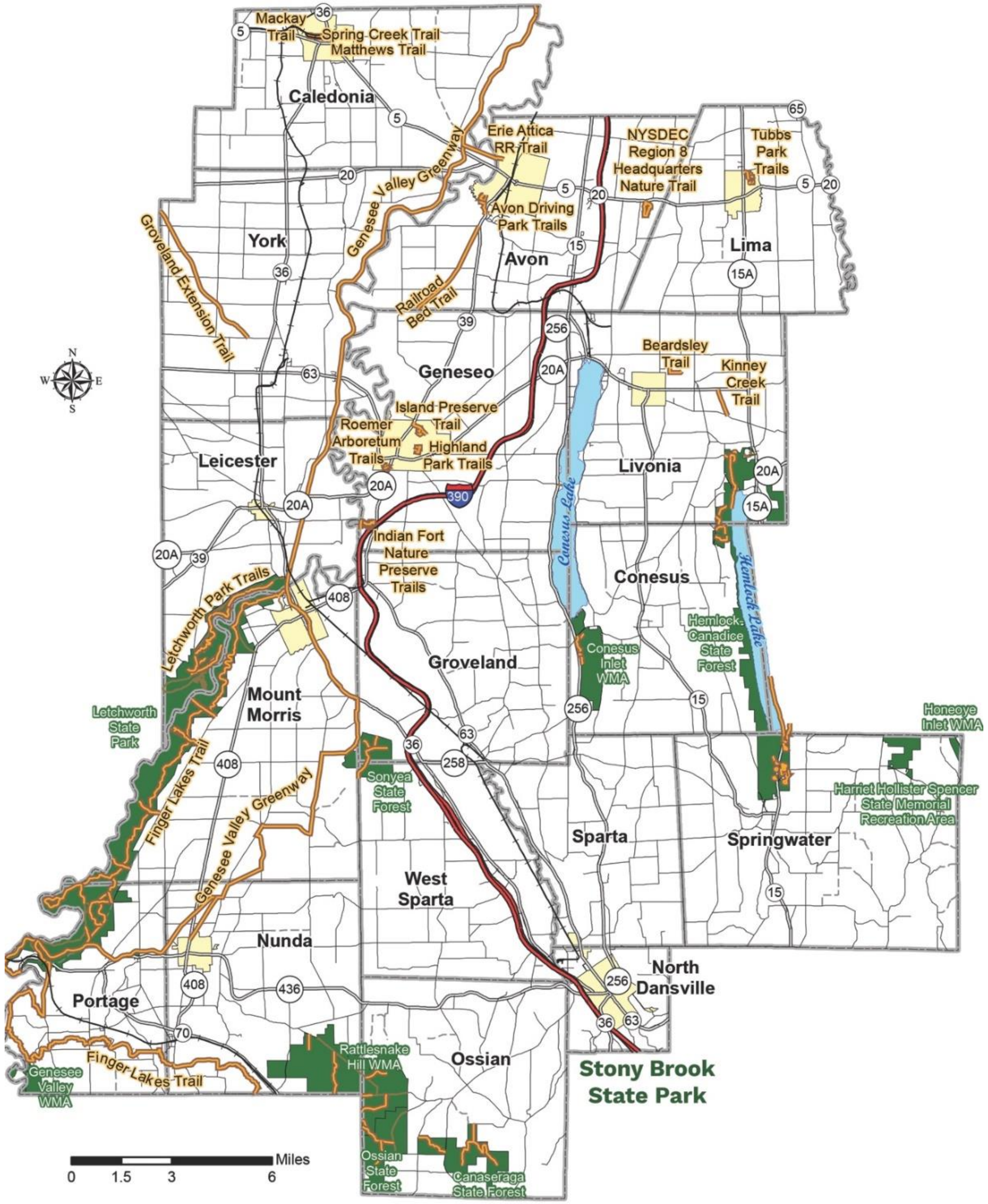
The Lakes

(within 5 minute drive)

- Livonia/ Lakeville

(within 15 minute drive)

- Lima
- Avon



Connectivity

However, downtowns are physically isolated from peripheral natural assets and visitor attractions.

Genesee Country Village and Museum

15 minute bike ride to Caledonia

Warplane Museum

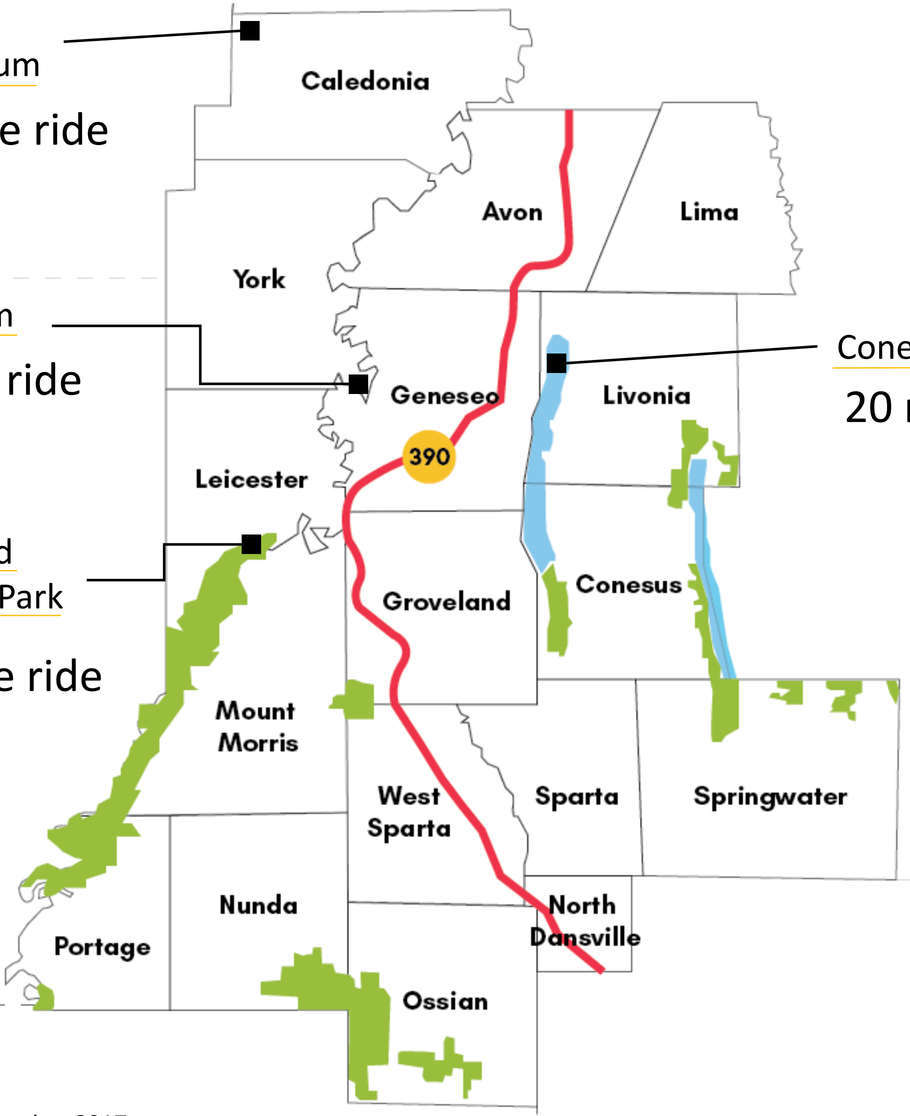
8 minute bike ride to Geneseo

Genesee River and Letchworth State Park

11 minute bike ride to Mt Morris

Conesus Lake

20 minute bike ride to Livonia



Stakeholders noted the need for walking and bike trails to connect to many of these existing recreation assets.

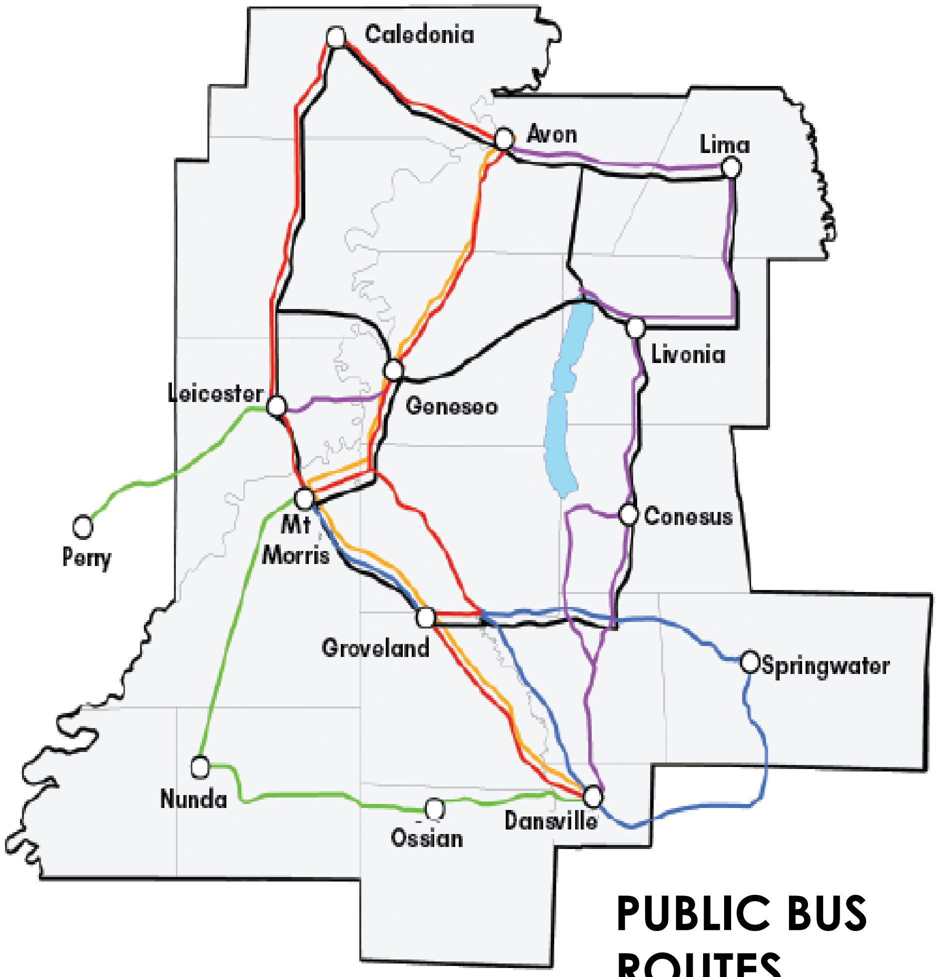
Signage should identify entrance to Genesee Valley Greenway in Mount Morris. Photo: LOA

Source: GoogleMaps (Bike travel time)

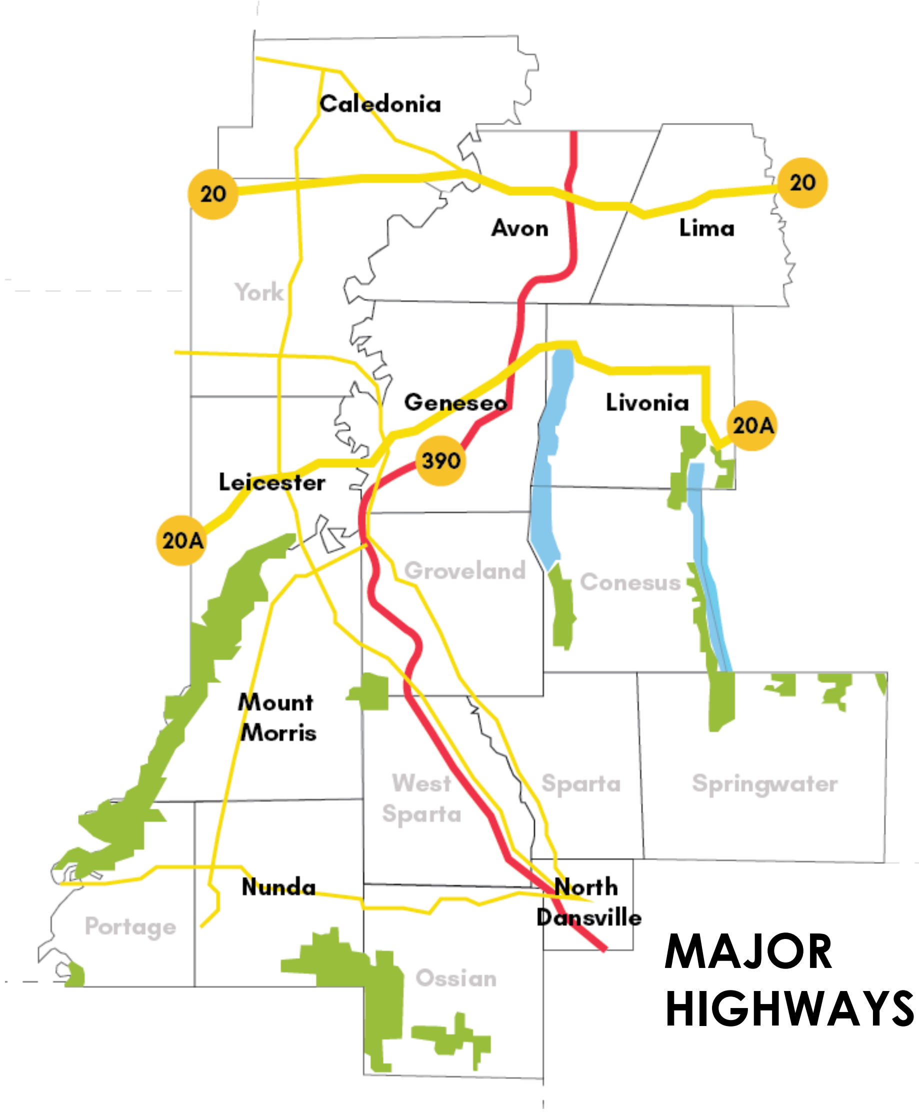
Prepared by Larisa Ortiz Associates – November 2017

Accessibility

There are limited alternative modes of transportation available in the county.



PUBLIC BUS ROUTES



MAJOR HIGHWAYS

97.35%

of households in Livingston County own at least 1 vehicle.

However, stakeholders noted the need for ride share options for residents who do not drive – e.g. students and senior population.

Mount Morris, NY.
Photo: LOA

Visibility

Downtowns are not located immediately adjacent to Interstate exits and lack visibility to potential customers driving fast on state thoroughfares.

Stakeholders noted the absence of:

a) State highway 'attraction' signs

b) Any form of gateway signage to mark the entry to downtown areas

In addition, blighted properties make bad 'first impressions'

Walkability

Some downtowns face lack of pedestrian crossings, public seating and sidewalk lighting, and have hilly terrains that make the pedestrian environment inaccessible to customers, particularly seniors and those with disabilities.

Proper sidewalks and lighting in Leicester will create comfortable pedestrian environment.
Photo: LOA

Provide resting points on hill leading up to downtown Avon. Photo: LOA

Lighting and landscaping will enhance pedestrian experience along alleys leading to Main St Geneseo from SUNY. Photo: LOA

Midblock crossings will encourage cross shopping on Main Street, Geneseo, NY.
Photo: LOA

Public Space

Although downtowns have existing public spaces – big and small, there is potential for stronger programming.

Leicester, NY.
Photo: LOA

Geneseo, NY.
Photo: Livingston County

Avon, NY.
Photo: LOA

PARK

Lima, NY.
Photo: LOA

PLAZA

No distinct gathering/ public spaces along main commercial street that are well-programmed.

- Caledonia
- Livonia
- Nunda
- Dansville
- Mount Morris

Parking

There are shared parking facilities in downtowns. However, these require better maintenance and improvements including re-striping, clear wayfinding signage, and landscaping.


Avon, NY.
Photo: LOA


Lima, NY.
Photo: LOA

Geneseo, NY.
Photo: LOA

Parking

Alleyways connecting downtown rear parking lots to main commercial streets are not welcoming to pedestrians.

Dansville, NY.
Photo: LOA

Mount Morris, NY.
Photo: LOA

Geneseo, NY.
Photo: LOA

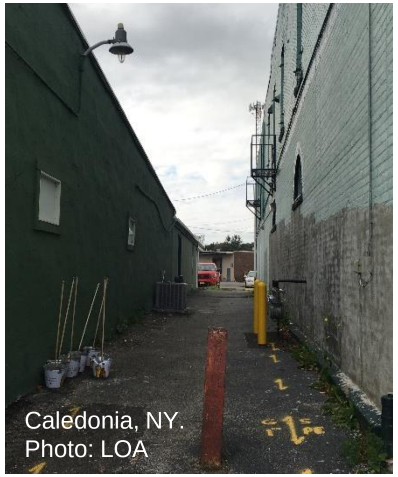
Livonia, NY.
Photo: LOA

Caledonia, NY.
Photo: LOA

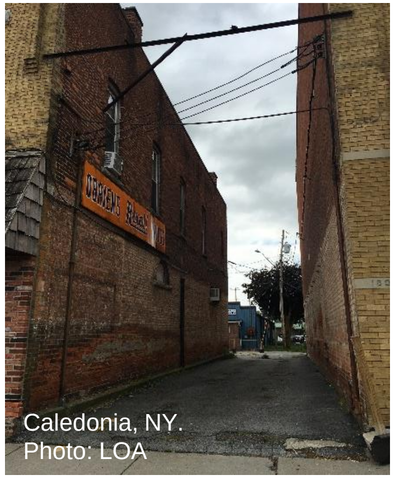
Avon, NY.
Photo: LOA

The alleys lack:

- Lighting
- Aesthetics
- Landscaping
- Paved sidewalks



Caledonia, NY.
Photo: LOA



Caledonia, NY.
Photo: LOA

Storefront vacancy rate based on data provided by Livingston Economic Development 2017

Vacant & Blighted Properties

Several downtowns face high storefront vacancy and disinvestment from absentee landlords and benign neglect.

Caledonia, NY.

8.5%

Geneseo, NY.

11.1%

Nunda, NY.

15.9%

Dansville, NY.

16.7%

Avon, NY.

21.4%

Mount Morris, NY.

11.8%

Livonia, NY.

17.4%

Lima, NY.

23.5%

Leicester, NY.

50%

Local and County Groups

Stakeholders across the County cited a strength of their downtowns was the **'strong community support and pride'**.

There are several volunteer-based organizations overseeing the success of downtowns including:

- Dansville Chamber of Commerce
- Mount Morris Partners for Progress
- Promote Geneseo
- Geneseo Community Main Street
- Avon Chamber of Commerce
- Local garden clubs

nsville merchants adopt and maintain tree pits. Photo: LOA

Promote Geneseo focuses on attracting visitor market to the downtown through program and marketing efforts. Photo: LOA

Anchors/ Destination

Legend

- Present
- Limited Options
- None

	BIG			MEDIUM			SMALL		
	Geneseo	Mt Morris	Dansville	Avon	Caledonia	Livonia	Nunda	Lima	Leicester
Village and/ or Town Hall	Present	Present	Present	Present	Present	Present	Present	Present	Present
Library	Present	Present	Present	Present	Present	Present	Present	Present	None
Post Office	Present	Present	Present	Present	Present	Present	Present	Present	Present
Churches	Present	Present	Present	Present	Present	Present	Present	Present	Present
Visitor Accommodation	Present	Present	Present	Limited Options	Limited Options	None	None	Limited Options	None
Entertainment	Present	Present	Present	None	None	None	None	None	None
Cultural/ Antique stores	Present	Present	Present	None	Present	None	None	Limited Options	Present
Dining	Present	Present	Present	Present	Present	Present	Limited Options	Present	None
Grocery/ Convenience	Present	Present	Present	Present	Present	Present	None	None	None
Farmers Market	Present	Present	Present	None	None	None	Present	Present	None
			Brewery opening	Avon Inn reopening		Makerspace opening			

Antique niche

Many downtowns in the County are well-known for its antique store offerings that attract visitors from farther away. This is particularly a draw for Mount Morris and Caledonia.

Mt Morris, NY.
Photo: LOA

Avon, NY.
Photo: LOA

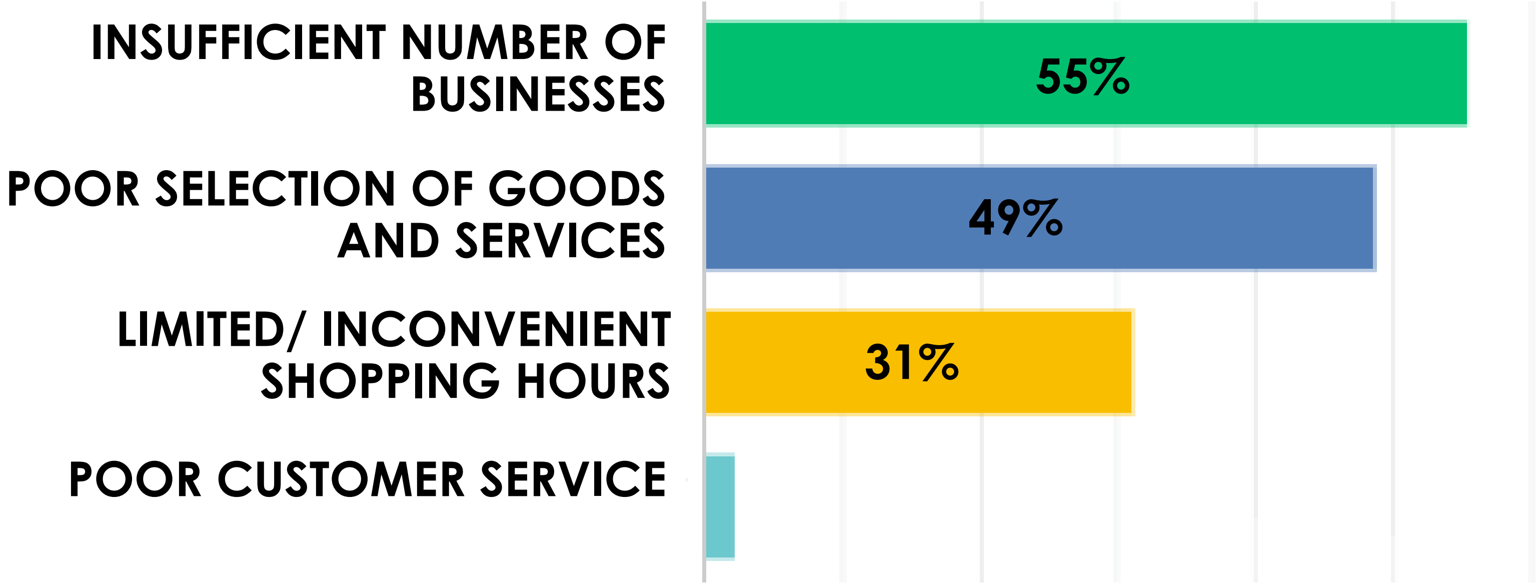
Caledonia, NY.
Photo: LOA

Critical store issues

Source: 2017 Livingston County Commercial District Assessment Community Survey (n=318)

Out of 318 responses to the 2017 Livingston County Commercial District Assessment Community Survey, the top three concerns cited by downtown users were related to the business environment:

- Insufficient number of businesses
- Poor selection of goods and services
- Limited or inconvenient shopping hours



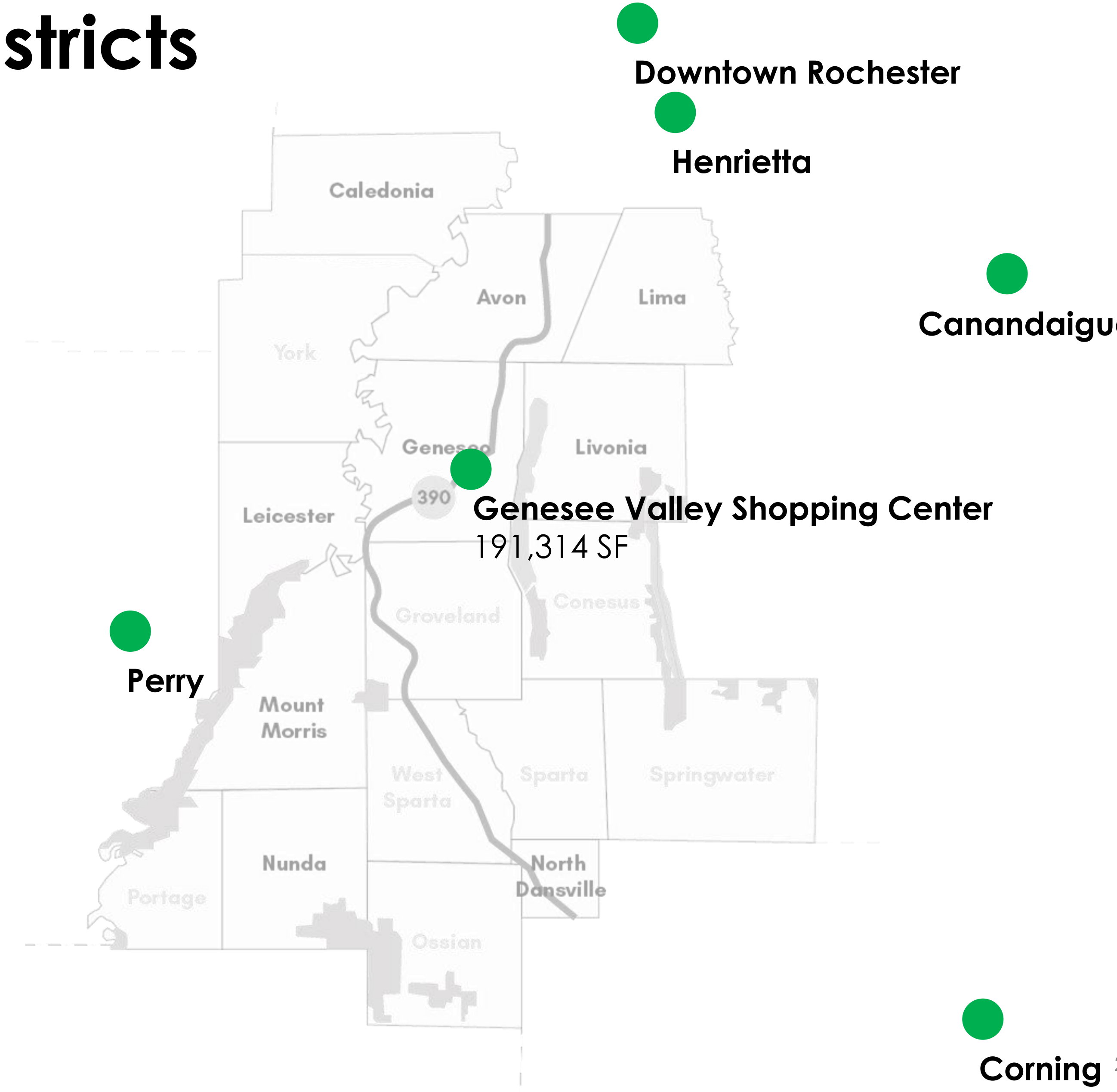
Competitive Shopping Districts

Source: LOA, ESRI Business Analyst Online 2017

Competitive shopping districts are mainly located outside of the County, presenting opportunities for downtowns to serve local residents.

A survey of over 318 residents and customers of Livingston County found that many were shopping outside the area in places like:

- Canandaigua
- Corning
- Henrietta
- Perry
- Rochester



Competitive Shopping Districts

Source: LOA, ESRI Business Analyst Online 2017

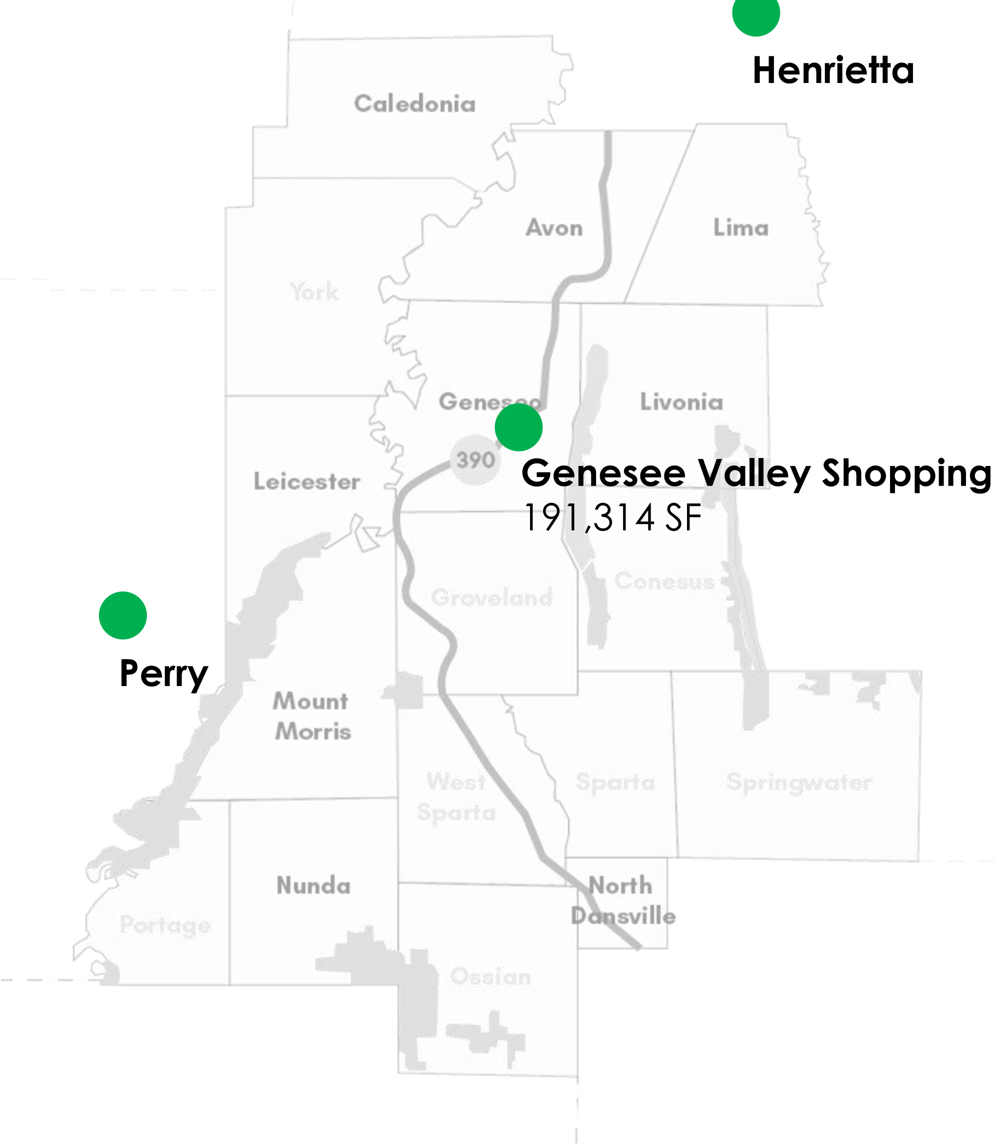
Monroe Avenue in Rochester, NY.

Market Street in Corning, NY.

Downtown Rochester

Henrietta

Canandaigua



Genesee Valley Shopping Center
191,314 SF

Perry

Corning

DEMOGRAPHICS

Widening income gap

Source: ESRI Business Analyst Online 2017

Retailers serving convenience goods and services need to offer price points that can meet bifurcated income earnings of residents.

Income range	2017	2022 (Projected)
<$15,000	11.3%	11.7%
$15,000 - $24,999	10.5%	10.1%
$25,000 - $34,999	9.8%	9.3%
$35,000 - $49,999	13.6%	12.2%
$50,000 - $74,999	19.4%	16.2%
$75,000 - $99,999	14.8%	14.3%
$100,000 - $149,999	14.3%	17.6%
$150,000 - $199,999	4.2%	5.8%
$200,000+	2.1%	2.8%

Rise in lowest income bracket ($15,000)

Rise in higher income brackets ($100,000>)

Rise of two distinct age groups

Source: ESRI Business Analyst Online 2017

Downtowns need to be accessible to both young Millennial population and Baby Boomers – through retail offerings, entertainment options, and physical environment.

Age Range	2010	2017	2022 (Projected)
0-14	16.3%	14.8%	14.3%
15 - 24	18.4%	17.9%	17.1%
25-44	22.3%	22.3%	22.9%
45- 64	29.3%	28.4%	26.3%
65 - 74	7.2%	9.9%	11.5%
75 - 84	4.5%	4.7%	5.7%
85 +	2.0%	2.2%	2.2%

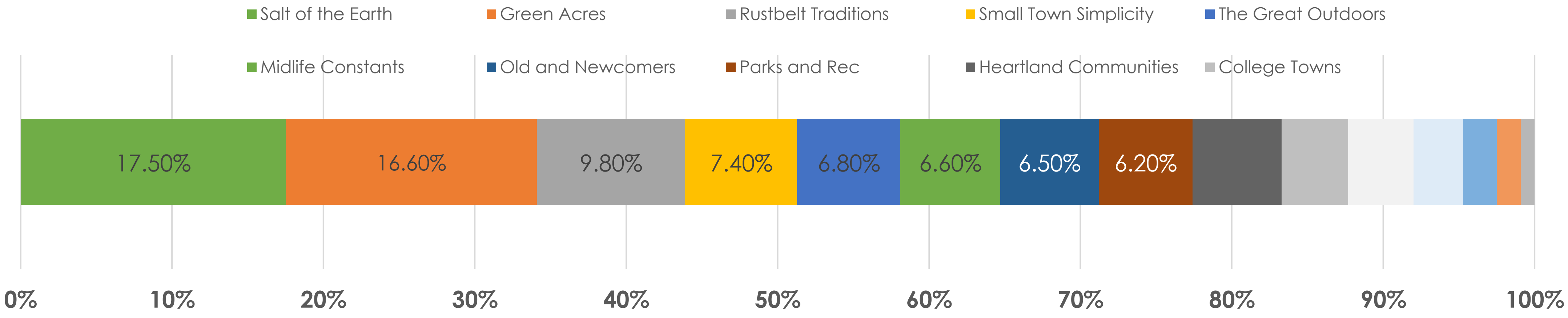
Rise in young Millennial population

(+ 5% college-student population)

Rise in Baby Boomer population

Psychographic Profiles

The profiles of County- resident customers range from low to moderate incomes and are therefore cost-conscious and loyal to brands they like.



Source: ESRI Business Analyst Online 2017

Salt of the Earth (17.5%)
MHI: $53,000
Median Age: 43.1

- Traditional, rural lifestyles
- Embrace the outdoors
- Cost-conscious
- Loyal to brands they like, with a focus on buying American
- Last to buy latest products
- Healthy and nutritious foods
- Experts with DIY projects
- Seek face-to-face contact

Green Acres (16.6%)
MHI: $72,000
Median Age: 43.0

- Country living and self-reliance
- DIY enthusiasts – remodeling homes, gardening etc.
- Embraces outdoors and sports
- Cautious consumers who focus on quality and durability
- Comfortable with some technology

Rustbelt Traditions (9.8%)
MHI: $49,000
Median Age: 38.4

- Family-oriented, spends time at home
- Budget-aware shoppers favoring American-made products
- Many households derive income from Social Security and retirement accounts

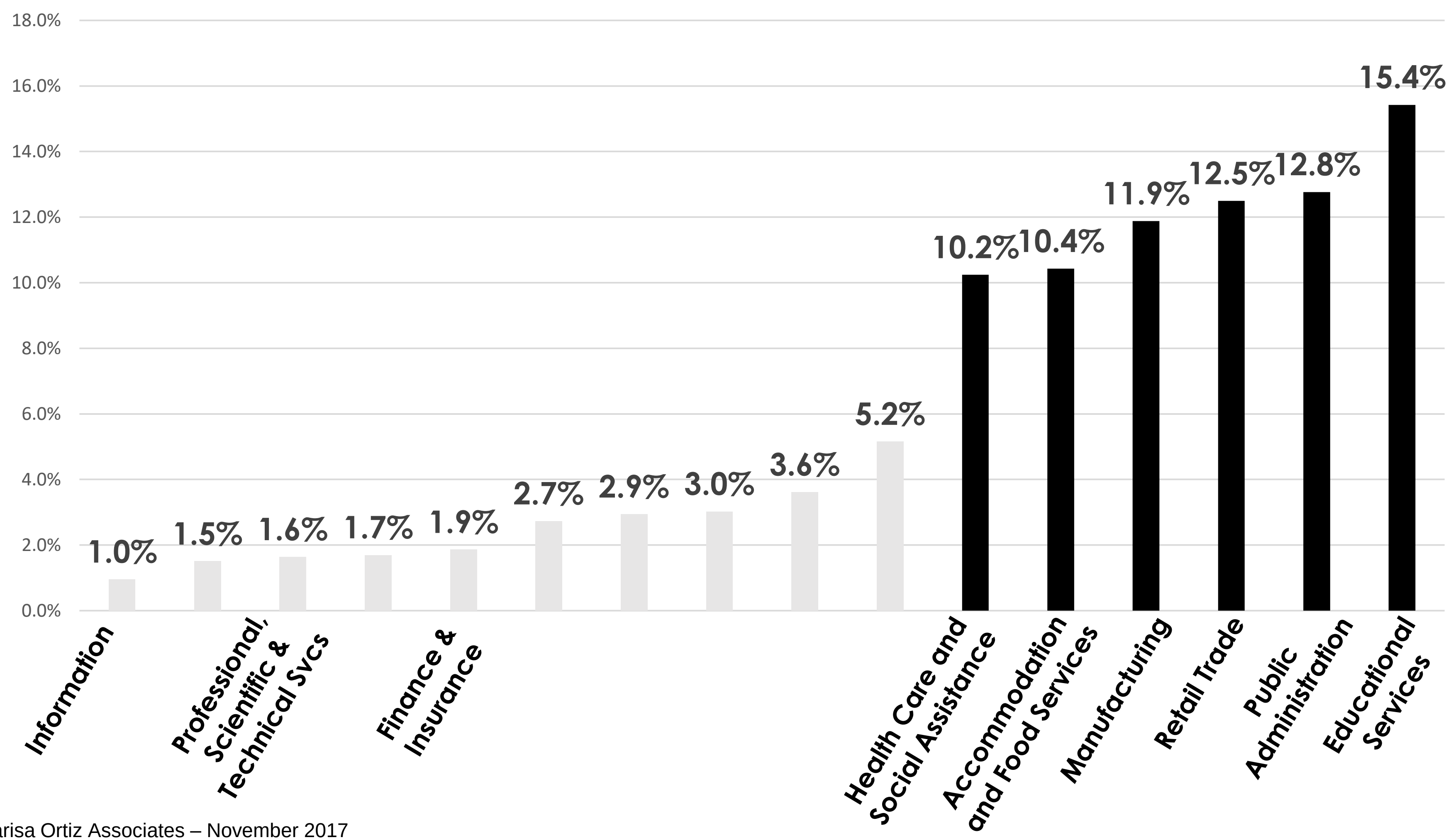
Small Town Simplicity (7.4%)
MHI: $27,000
Median Age: 40.0

- Down-to-earth lifestyle and semi-rural
- Community-oriented residents
- Price-conscious consumers, coupon shoppers

MARKET DATA - WORKERS

Workforce Profile

Source: LEHD OnTheMap Census Bureau 2014



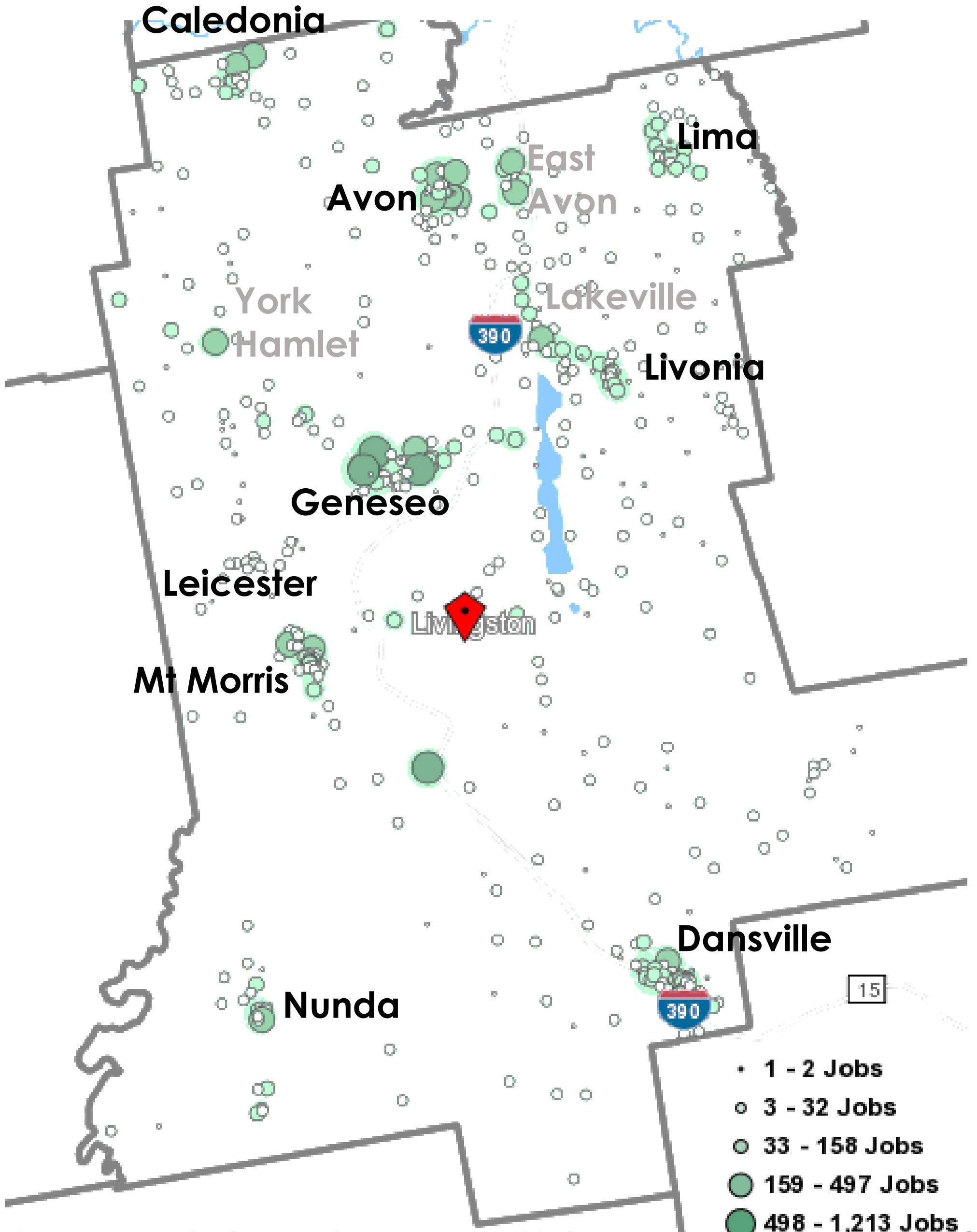
Most workers in Livingston County are employed in public administration, educational and health care services, manufacturing, and retail trade, accommodation and food services

MARKET DATA - WORKERS

Major Employers

Major employers are located in close proximity to various downtowns in the County.

According to major employers present at stakeholder meetings, employees are seeking upscale, downtown residential options close to workplaces.

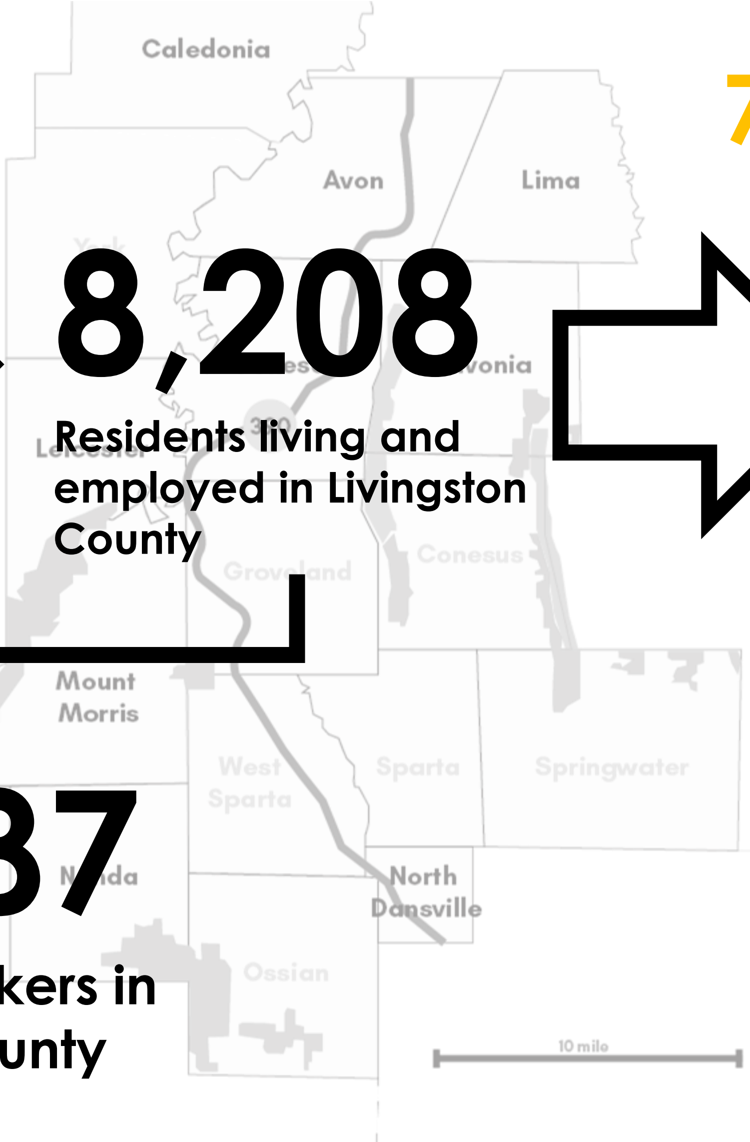


Source: LEHD OnTheMap Census Bureau 2014

Workforce Profile

In order to capture the demand of commuter residents, retailers need to be strategic about opening hours and goods and services on offer.

Source: LEHD OnTheMap Census Bureau 2014; 2017 Livingston County Community Survey



9,479

Outsiders employed in Livingston County

8,208

Residents living and employed in Livingston County

70% of workforce

18,164

Residents employed outside Livingston County.

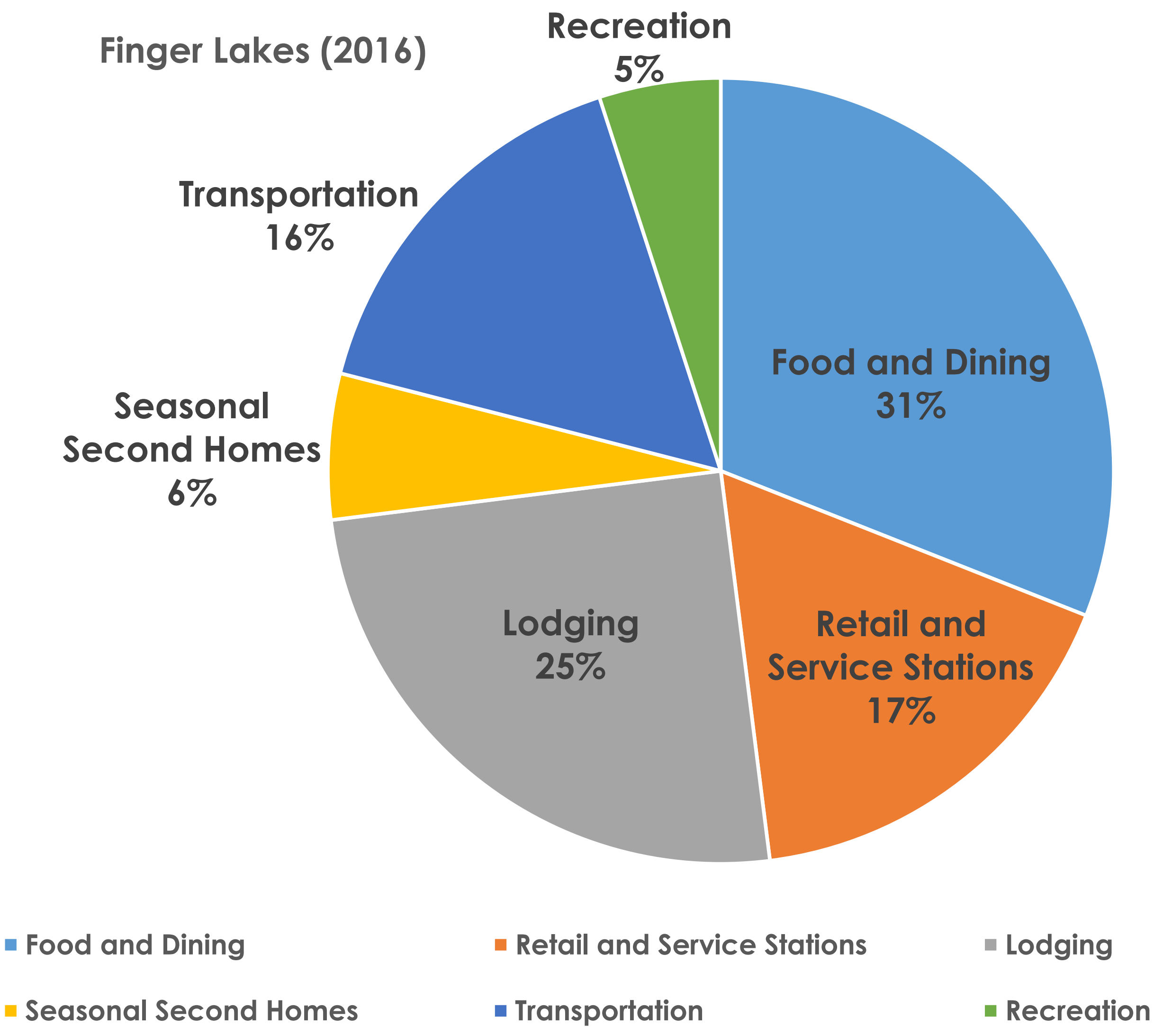
This customer is likely able to do most of their shopping after 6pm and on weekends

17,687

Total no. of workers in Livingston County

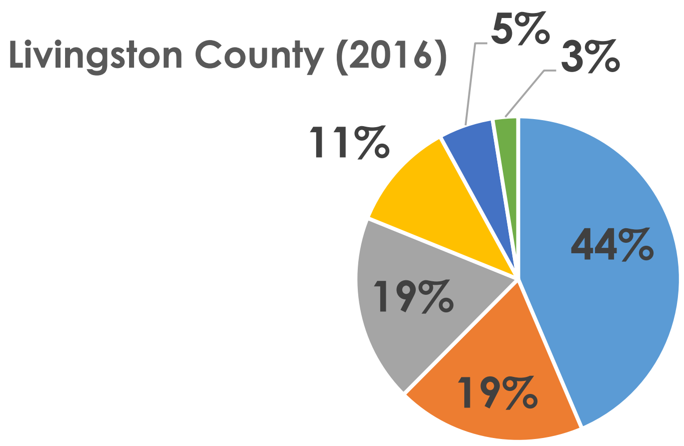
In fact, **31%** of respondents to an online survey indicated that limited/ inconvenient hours were a major downtown issue for shoppers.

Visitor Spending



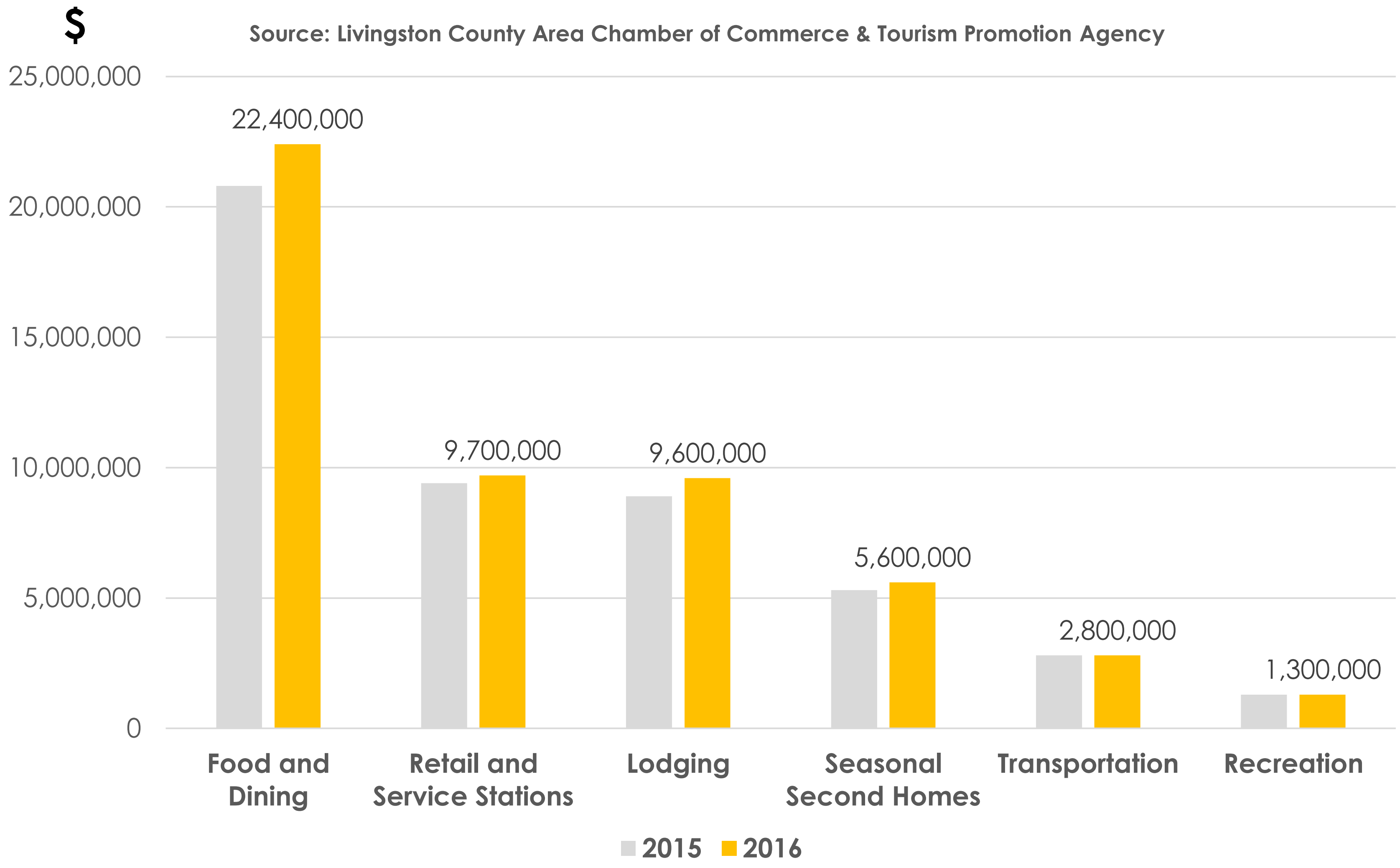
2.1% of total visitor expenditure
in the Finger Lakes region is spent in Livingston County.

However, the share of visitor spending on Food and Dining and Retail and Service Stations is much larger in Livingston County than at the regional level.



Source: Tourism Economics

Visitor Spending



Overall, visitor spending has increased by 5.8% from 2015 to 2016. Visitors to Livingston County are spending more on food and dining than on any other tourist spending category. There may be an opportunity for downtowns to leverage this food and dining spending amongst visitors.

Source: NYS Tourism Economics

What is retail leakage and surplus?

An analysis of retail spending compares the total discretionary income of residents within the trade area against the total sales estimated for local businesses, also within the same trade area.

Surplus: Local businesses sell more than local residents are purchasing. This means that outsiders may be coming into the area to shop.

Leakage: Residents are spending more than local stores are selling, suggesting that residents are spending outside the trade area.

Depending on the size of leakage, this <u>may</u> suggest opportunities for both existing and new businesses to better meet the needs of the residential customer base.

RETAIL LEAKAGE

Retail Gap Analysis

Residents spent over **$830.5 million** on retail and food and drink in 2016.

20% of this total expenditure was spent outside Livingston County, resulting in **$167.5 million** in retail leakage.

However, 80 cents of every dollar spent by a resident is spent within the County.

Retail Leakage + Potential SF

Source: LOA; ESRI Business Analyst Online 2017; ICSC Shopping Mall Sales Productivity (Mid Atlantic region)

Retail Category	Total Leakage	Potential SF	20% Capture Rate	10% Capture Rate
Furniture & Home Furnishings Stores	**$ 20,194,177**	515,552	103,110	51,555
Electronics & Appliance Stores	**$ 18,019,856**	42,581	8,516	4,258
Bldg Materials, Garden Equip. & Supply Stores	**$ 623,933**	3,284	657	328
Specialty Food Stores	**$ 2,195,306**	40,163	8,033	4,016
Health & Personal Care Stores	**$ 40,783,640**	111,339	22,268	11,134
Clothing & Clothing Accessories Stores	**$ 50,851,654**	509,689	101,938	50,969
Sporting Goods, Hobby, Book & Music Stores	**$ 3,007,644**	127,066	25,413	12,707
General Merchandise Stores	**$ 24,874,945**	472,548	94,510	47,255
Miscellaneous Store Retailers	**$ 11,130,090**	435,791	87,158	43,579
Office Supplies, Stationery & Gift Stores	**$ 7,484,827**	268,370	53,674	26,837
Food Services & Drinking Places	**$ 16,816,792**	301,917	60,383	30,192
Restaurants/Other Eating Places	**$ 11,044,552**	246,530	49,306	24,653
TOTAL POTENTIAL SQUARE FOOTAGE:		**3,074,830**	**614,966**	**307,483**

Based on resident spending alone, Livingston County has the potential to grow its retail offerings between 300,000-600,000 SF in a wide range of categories.

In particular, food services and drinking places present a great retail opportunity when combined with visitor demand.

District-Level Analysis

Categorizing districts – Big, Medium, Small

BIG

Proximity to Year-round Major Anchors and Attractions including:

- Natural assets (Letchworth State Park, Lake Conesus)
- Museums (Livingston County Historic Museum, Warplane Museum)
- Large festivals and events (Letchworth Arts & Crafts Show, Dansville Balloon Festival)
- Popular dining and drinking establishments (winery, cidery, brewery, full-service restaurants)

Major Employers

- Educational services: School districts, colleges
- Health Care and Social Assistance: Hospitals, nursing facilities
- Manufacturers
- Accommodation and Food Services
- Retail Trade

No. of retail businesses

- 90< storefronts

MEDIUM

Proximity to some Major Attractions including:

- Natural assets (Lake Conesus)
- Museums (Genesee Country Village & Museum)

Few Major Employers

- Educational services: School districts, colleges
- Health Care and Social Assistance: Hospitals, nursing facilities
- Manufacturers

No. of retail businesses

- 45-90 storefronts

SMALL

No Major Anchors and Attractions

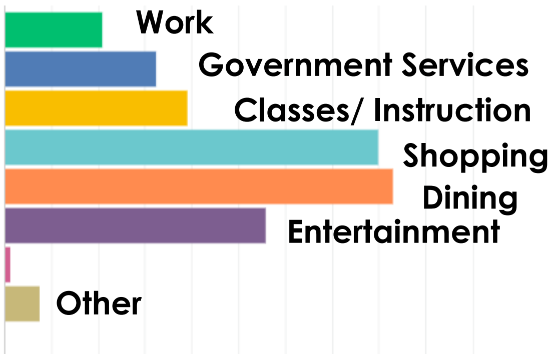
Limited Major Employers

No. of retail businesses

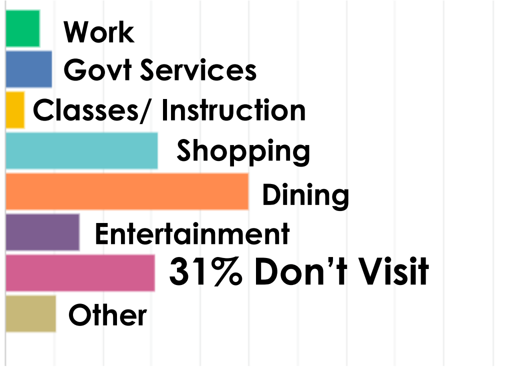
- <45 storefronts

The Downtown Partnership of Livingston County conducted an online survey to gather input from community members on the challenges and opportunities of the retail environment in the County. The survey received over 300 responses between October – December 2017. The following charts show why respondents visit the following downtown districts in Livingston County.

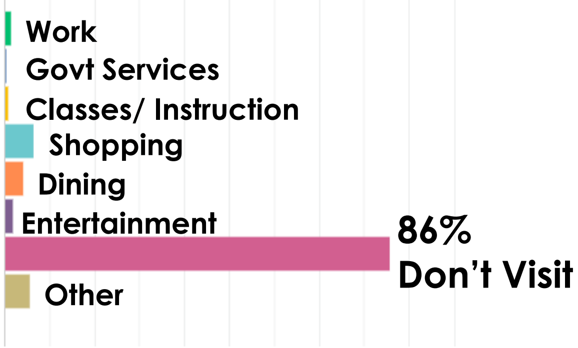
GENESEO



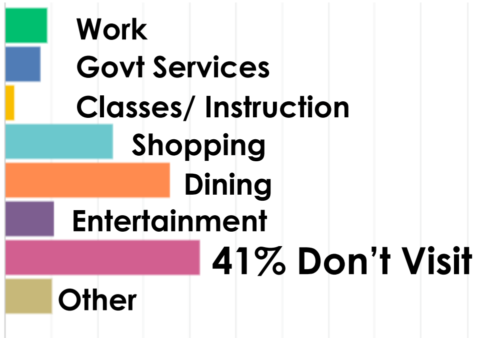
AVON



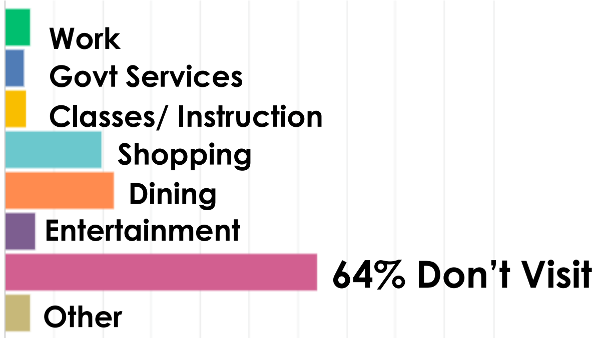
NUNDA



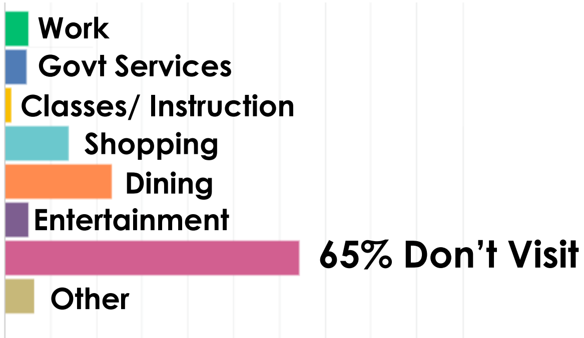
MOUNT MORRIS



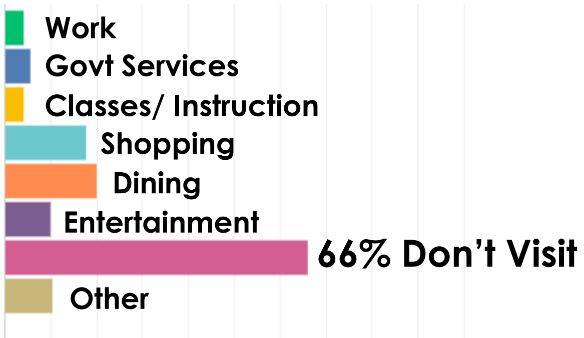
CALEDONIA



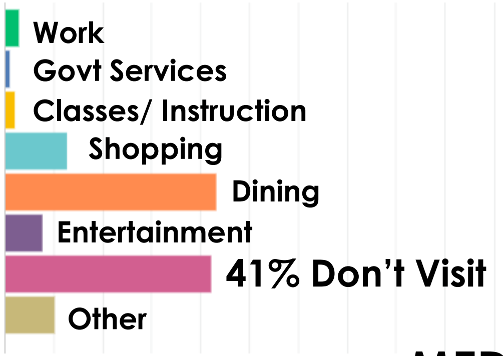
LIMA



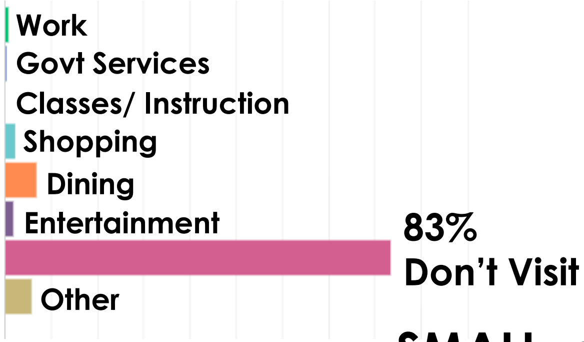
DANSVILLE



LIVONIA

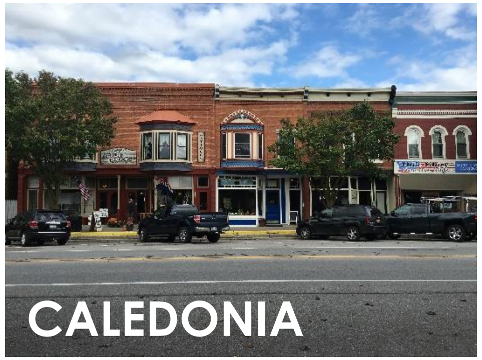


LEICESTER



BIG **MEDIUM** **SMALL**

BIG



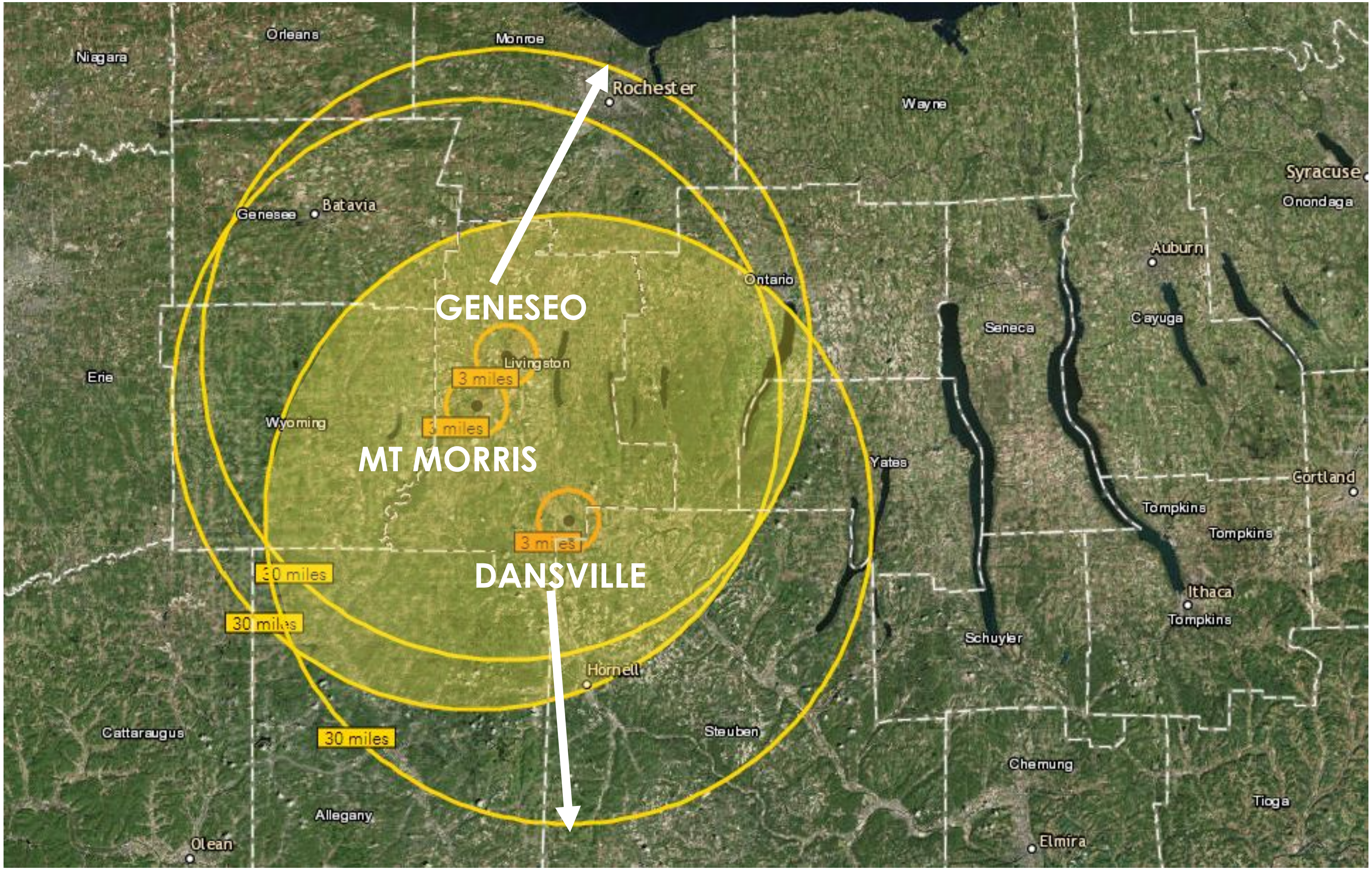
MEDIUM

SMALL

PRIMARY TRADE AREA: 3-mile radius
SECONDARY TRADE AREA: 30-mile radius

BIG

TRADE AREAS



PRIMARY TRADE AREA: 3-MILE RADIUS

SECONDARY TRADE AREA: 30-MILE RADIUS

Geneseo and Mount Morris are likely able to pull secondary customers farther north from Rochester, Batavia and Henrietta.

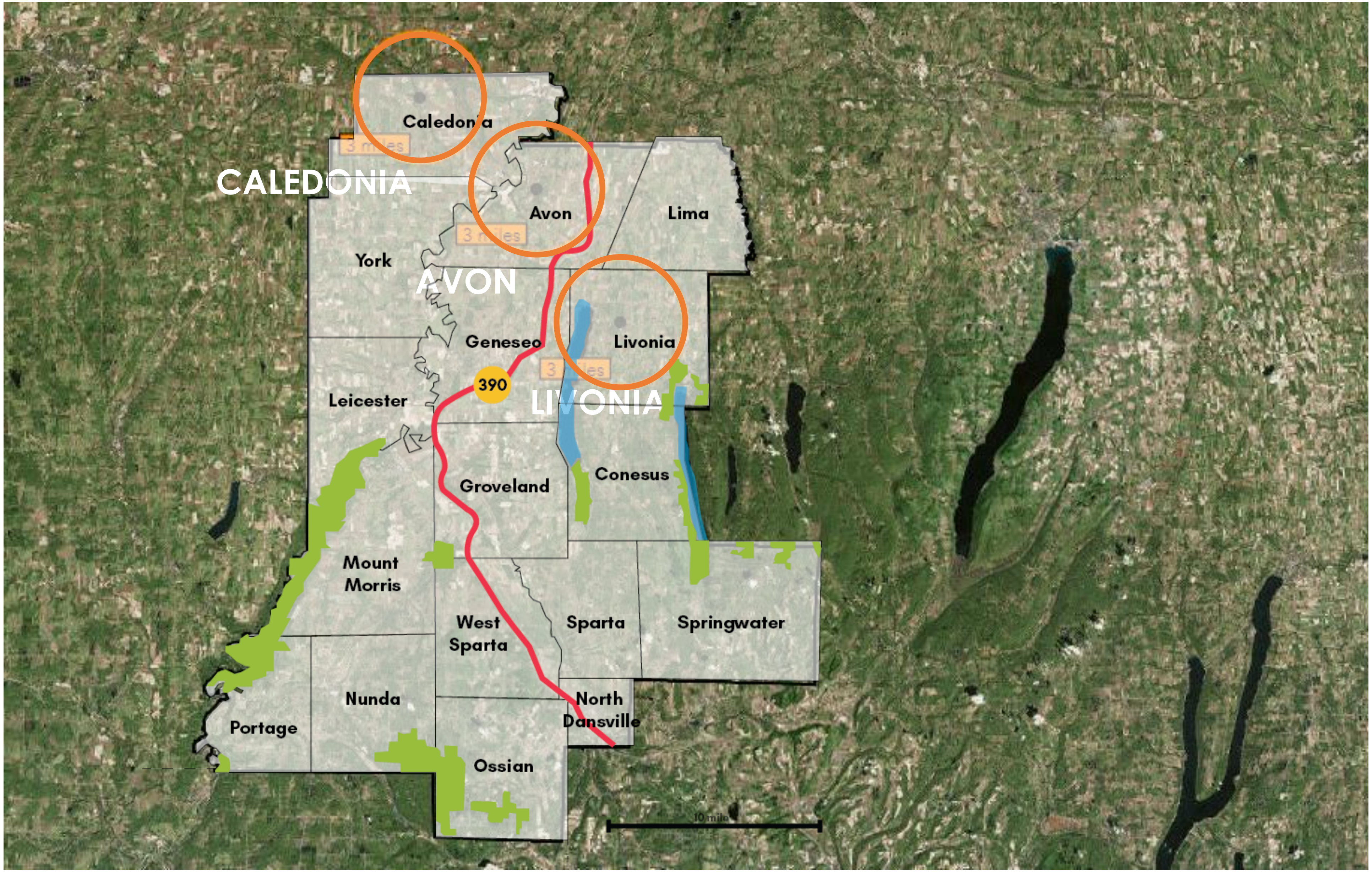
Meanwhile, Dansville is pulling secondary customers from farther south.

Source: ESRI Business Analyst Online 2017

PRIMARY TRADE AREA: 3-mile radius

MEDIUM

TRADE AREAS

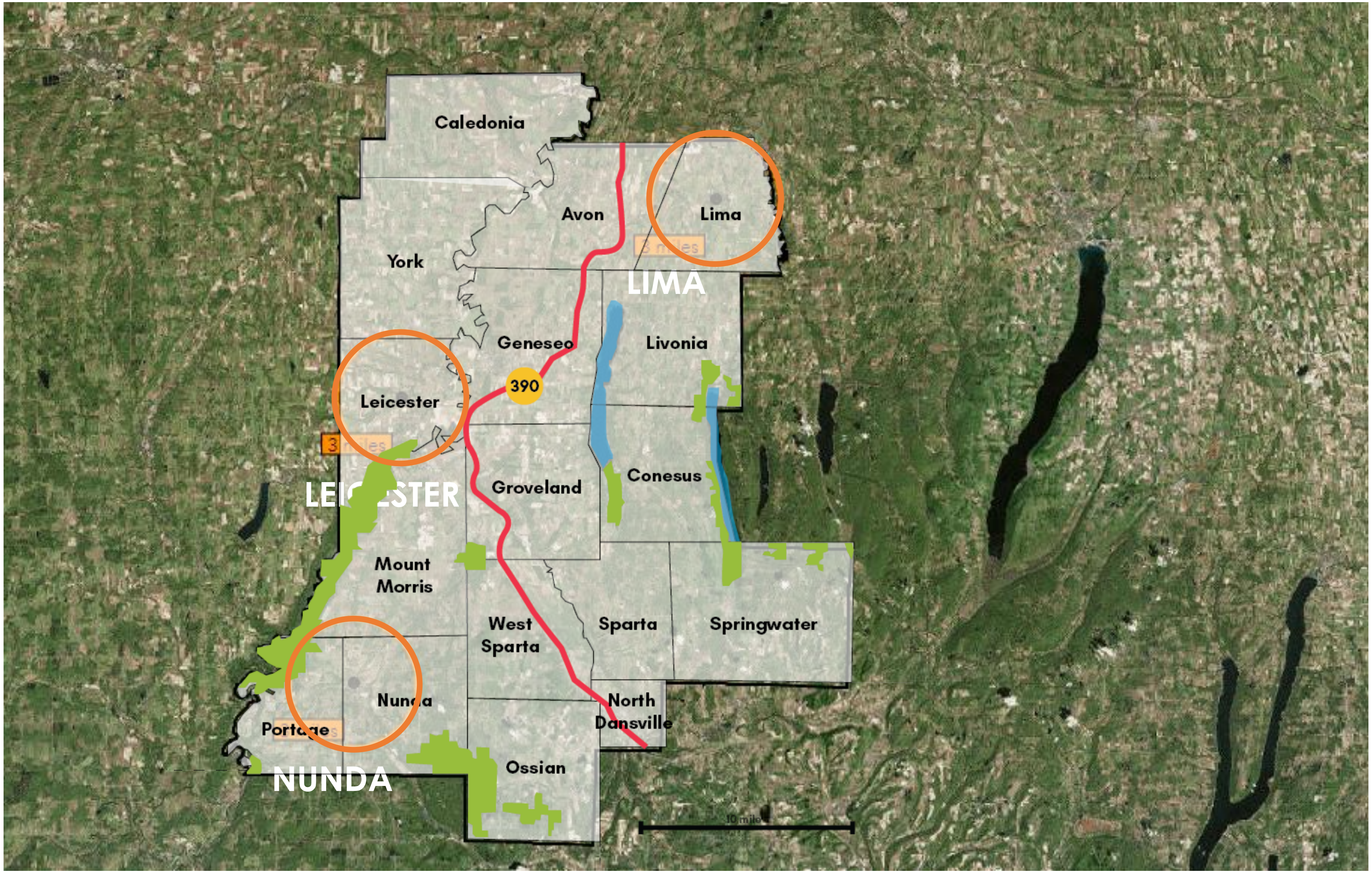


PRIMARY TRADE AREA: 3-MILE RADIUS

Source: ESRI Business Analyst Online 2017

PRIMARY TRADE AREA: 3-mile radius

SMALL



PRIMARY TRADE AREA: 3-MILE RADIUS

Source: ESRI Business Analyst Online 2017

DOWNTOWN CHALLENGES/ OPPORTUNITIES

PHYSICAL ENVIRONMENT	GENESEO	MT MORRIS	DANSVILLE	AVON	CALEDONIA	LIVONIA	NUNDA	LIMA	LEICESTER
Poor rear parking lot conditions	Critical	Critical	Critical	Critical	Critical	Somewhat Critical	Not applicable	Not applicable	Not applicable
Lack of visibility/ accessibility of parking	Critical	Critical	Somewhat Critical	Critical	Critical	Critical	Not applicable	Not applicable	Not applicable
Poor connectivity to nearby destinations	Somewhat Critical	Somewhat Critical			Somewhat Critical				
Underutilized buildings in retail core		Critical	Critical	Critical	Somewhat Critical	Somewhat Critical	Somewhat Critical	Somewhat Critical	Not applicable
Low pedestrian comfort and safety	Somewhat Critical	Critical	Critical	Somewhat Critical	Somewhat Critical	Critical	Somewhat Critical	Critical	Somewhat Critical
No distinct retail corridor/node	Not applicable	Not applicable	Not applicable	Not applicable	Not applicable	Not applicable	Not applicable	Not applicable	Critical

Legend

- Critical
- Somewhat Critical
- Not applicable

MAIN ISSUES TO ADDRESS:

- PARKING
- CONNECTIVITY
- REDEVELOPMENT

DOWNTOWN CHALLENGES/ OPPORTUNITIES

BUSINESS ENVIRONMENT	GENESEO	MT MORRIS	DANSVILLE	AVON	CALEDONIA	LIVONIA	NUNDA	LIMA	LEICESTER
Poor storefront transparency/ display					Somewhat Critical		Critical		Not applicable
Some storefront façades in disrepair			Critical	Somewhat Critical	Somewhat Critical	Somewhat Critical	Somewhat Critical	Somewhat Critical	Not applicable
High storefront vacancy rate			Somewhat Critical	Critical		Somewhat Critical	Somewhat Critical	Critical	Critical
High passive storefront rate	Critical	Critical	Critical	Critical		Critical	Critical	Critical	Critical
Inconvenient business hours/seasonal biz	Critical	Critical	Critical	Critical	Critical	Critical	Critical	Critical	Not applicable
Insufficient no. of retail businesses				Critical		Critical	Critical	Critical	Critical
Lack of destination/ anchors				Somewhat Critical	Somewhat Critical	Somewhat Critical	Critical	Critical	Critical
Competing with strip mall/ chain stores	Critical		Critical	Critical			Somewhat Critical		

Legend
- Critical
- Somewhat Critical
- Not applicable

MAIN ISSUES TO ADDRESS:
- **TENANT MIX**
- **DESTINATION ACTIVITIES**

DOWNTOWN CHALLENGES/ OPPORTUNITIES

MARKET DEMAND	GENESEO	MT MORRIS	DANSVILLE	AVON	CALEDONIA	LIVONIA	NUNDA	LIMA	LEICESTER
Facing population decline					■				
Cluster of students with limited income	■								
Rise in Baby Boomer population		■	■	■	■	■	■	■	■
Fall in Millennial population				■					
Low household median incomes							■		
High % of population commutes to work	■	■	■	■	■	■			
Very small daytime worker population					■	■	■	■	■
High visitor rate due to proximity to asset	■	■			■	■			

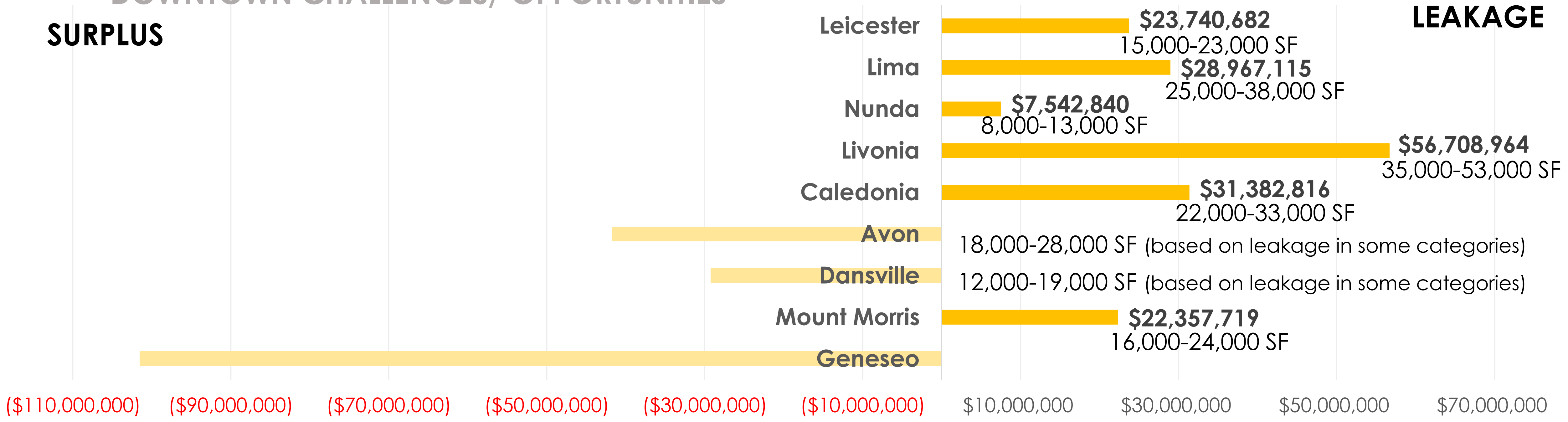
Legend

- ■ Critical
- Somewhat Critical
- Not applicable

MAIN ISSUES TO ADDRESS:

- BABY BOOMERS' NEEDS
- CONVENIENCE FOR WORKING POPULATION
- INCREASING VISIBILITY TO VISITORS

DOWNTOWN CHALLENGES/ OPPORTUNITIES



Legend

- Primary & Secondary TA
- Secondary TA only
- Primary TA only

RETAIL LEAKAGE CATEGORIES	GENESEO	MT MORRIS	DANSVILLE	AVON	CALEDONIA	LIVONIA	NUNDA	LIMA	LEICESTER
Food Services & Drinking Places									
Clothing & Accessories									
General Merchandise									
Health & Personal Care									
Miscellaneous Stores (florists, stationery, gifts)									
Sporting goods, Hobby, Books & Music									
Furniture & Home Furnishings									
Building materials, Garden Equipment & Supply									

Appendix

Major Employers

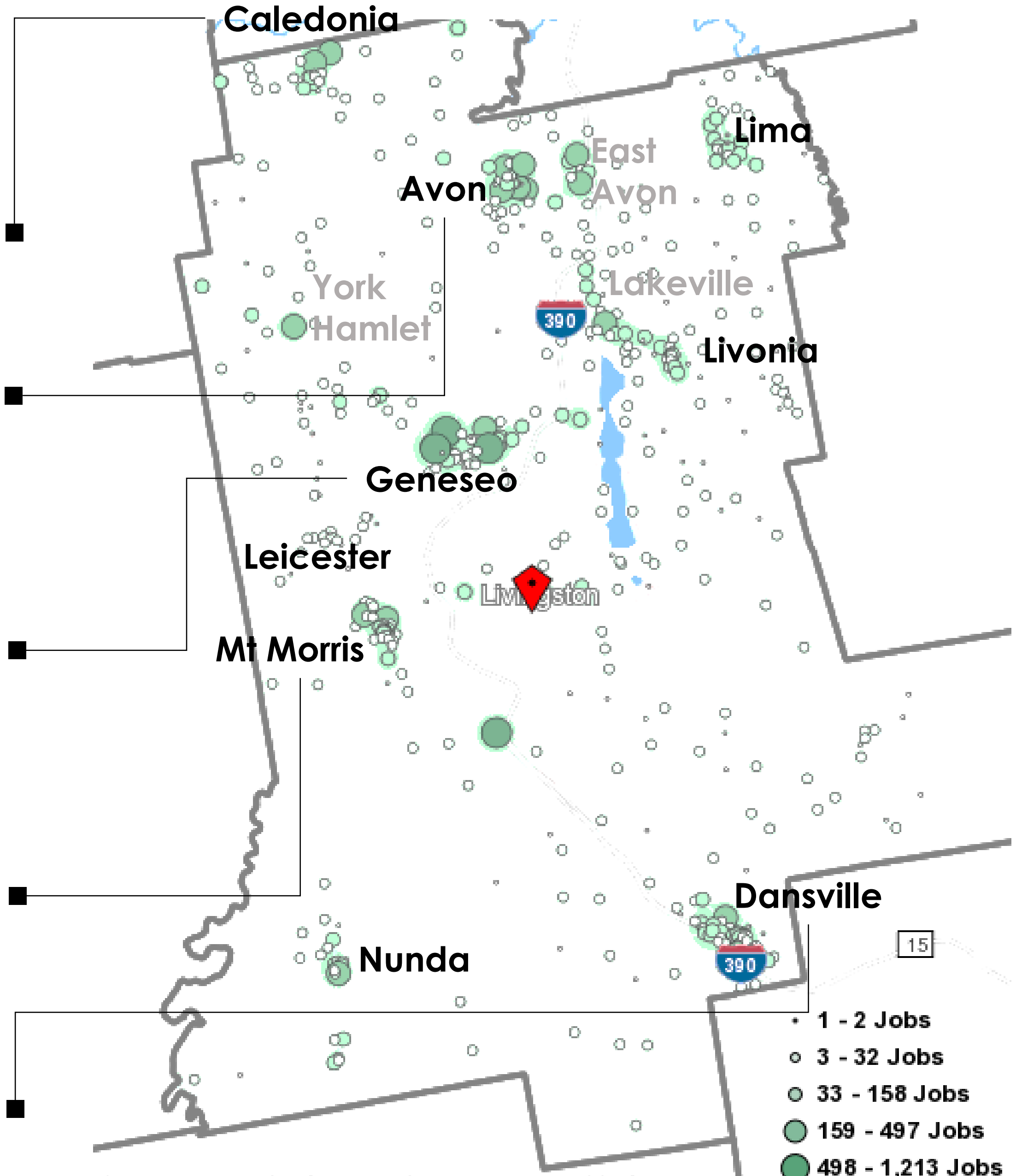
Educational Services: Caledonia-Mumford Central School District
Manufacturing: JCI Jones Chemical, Applied Energy Solutions

Educational Services: Avon Central Schools
Health Care and Social Assistance: Avon Nursing Facility
Manufacturing: Kraft Heinz, Aldon Corporation

Educational Services: SUNY Geneseo, Geneseo Central School District
Accommodation & Food Services and Retail Trade: Hampton Inn Geneseo, Days Inn Geneseo, Wegmans, Tim Hortons, Denny's

Educational Services: Mt Morris Middle/ Senior High School
Health Care and Social Assistance: Livingston County Center for Nursing & Rehabilitation
Manufacturing: Golden Oaks Foods, Allied Frozen Storage

Educational Services: Dansville Central Schools
Health Care and Social Assistance: Noyes Memorial Hospital



Source: LEHD OnTheMap Census Bureau 2014

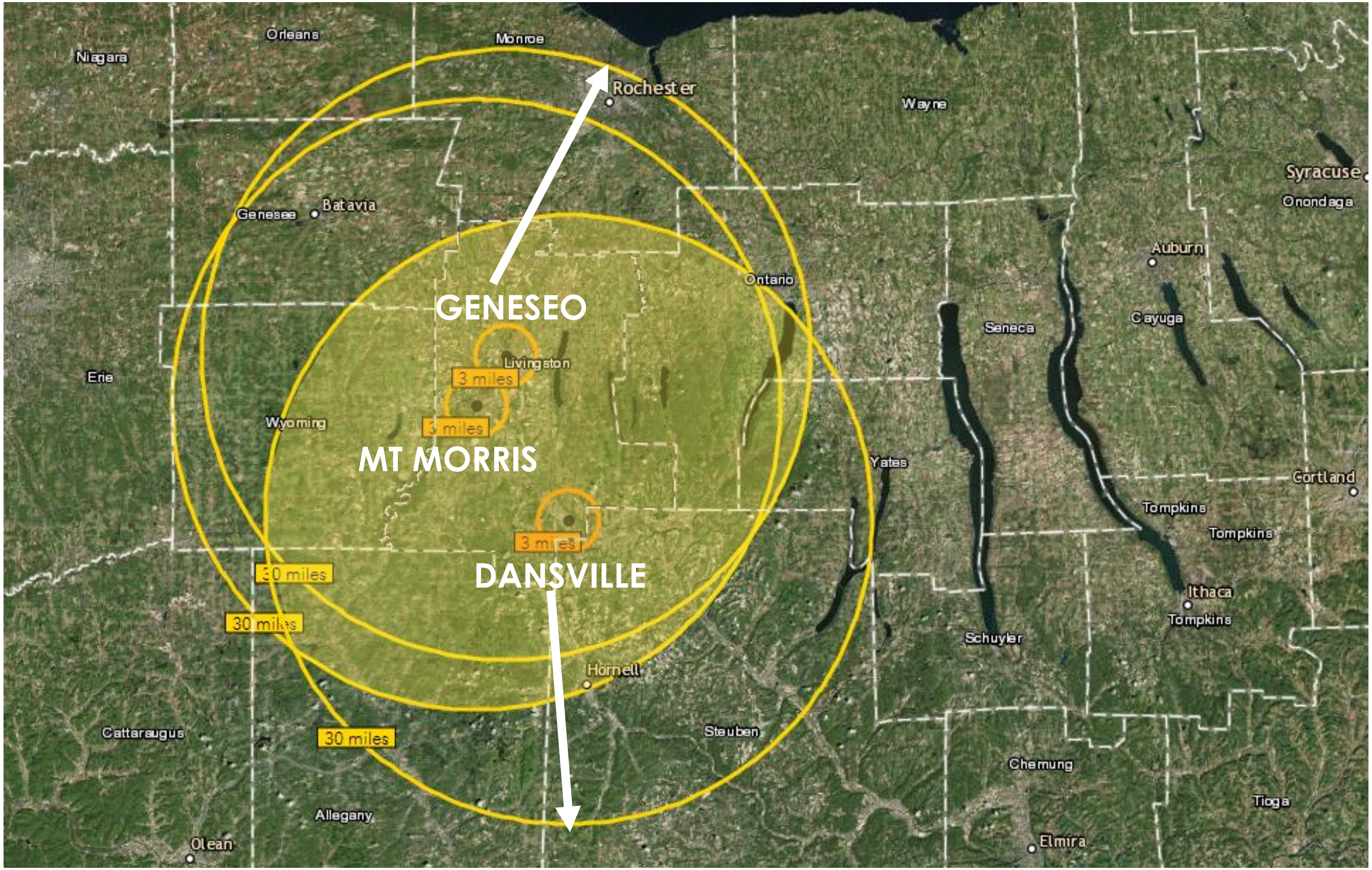
RETAIL CATEGORIES (by NAICS codes)

- **Furniture and Home Furnishings (442):** Includes furniture stores and home furnishings stores
- **Building Materials, Garden Equipment & Supply Stores (444)**: Includes building material and supplies dealers and lawn and garden equipment supply stores
- **Food and Beverage Stores (445)**: Includes grocery stores, specialty food stores, and beer, wine & liquor stores
- **Health and Personal Care stores (446)**: Includes pharmacies and drug stores
- **Clothing & Clothing Accessories Stores (448)**: Includes clothing stores, shoe stores, jewelry, luggage & leather goods stores
- **Sporting Goods, Hobby, Book & Music Stores (451)**: Includes book/periodical and music stores, sporting equipment stores, toy and hobby stores
- **General Merchandise (452)**: Includes department stores
- **Miscellaneous Stores (453)**: Includes florists, office supplies, stationery and gift stores, used merchandise stores
- **Food Services and Drinking Places (722)**: Includes restaurants (sit in and take out), drinking places (serving alcoholic beverages) and special food services (catering)

PRIMARY TRADE AREA: 3-mile radius
SECONDARY TRADE AREA: 30-mile radius

BIG

TRADE AREAS



PRIMARY TRADE AREA: 3-MILE RADIUS

SECONDARY TRADE AREA: 30-MILE RADIUS

Geneseo and Mount Morris are likely able to pull secondary customers farther north from Rochester, Batavia and Henrietta.

Meanwhile, Dansville is pulling secondary customers from farther south.

Source: ESRI Business Analyst Online 2017

ANCHORS + RETAIL MIX

- Anchored by food and drinking places, entertainment attractions and overnight lodging
- Large student population – businesses often operate based on school calendar
- Shopping center located just outside Main Street

GENESEO

Source: ESRI Business Analyst Online 2017

	2010	2017	2022
Total Population	9,112	9,514	9,564
Median Age	22.8	23.0	23.2
Population aged 25-44 (Millennials)	11.7%	12.6%	14.2%
Population aged 64> (Baby Boomers)	8.9%	10.5%	11.9%
Non-Institutionalized Group Quarters		34.4%	
Median Household Income		$45,006	$48,519
White Alone Population	90.1%	87.7%	86.3%
Asian Population	4.7%	5.6%	6.2%
Hispanic Population	3.5%	5.2%	6.2%
Bachelors/ Graduate/ Prof Degrees		48.1%	
Top Tapestry Segments	Old and Newcomers (41.9%) College Towns (35.4%) Midlife Constants (10.0%)		

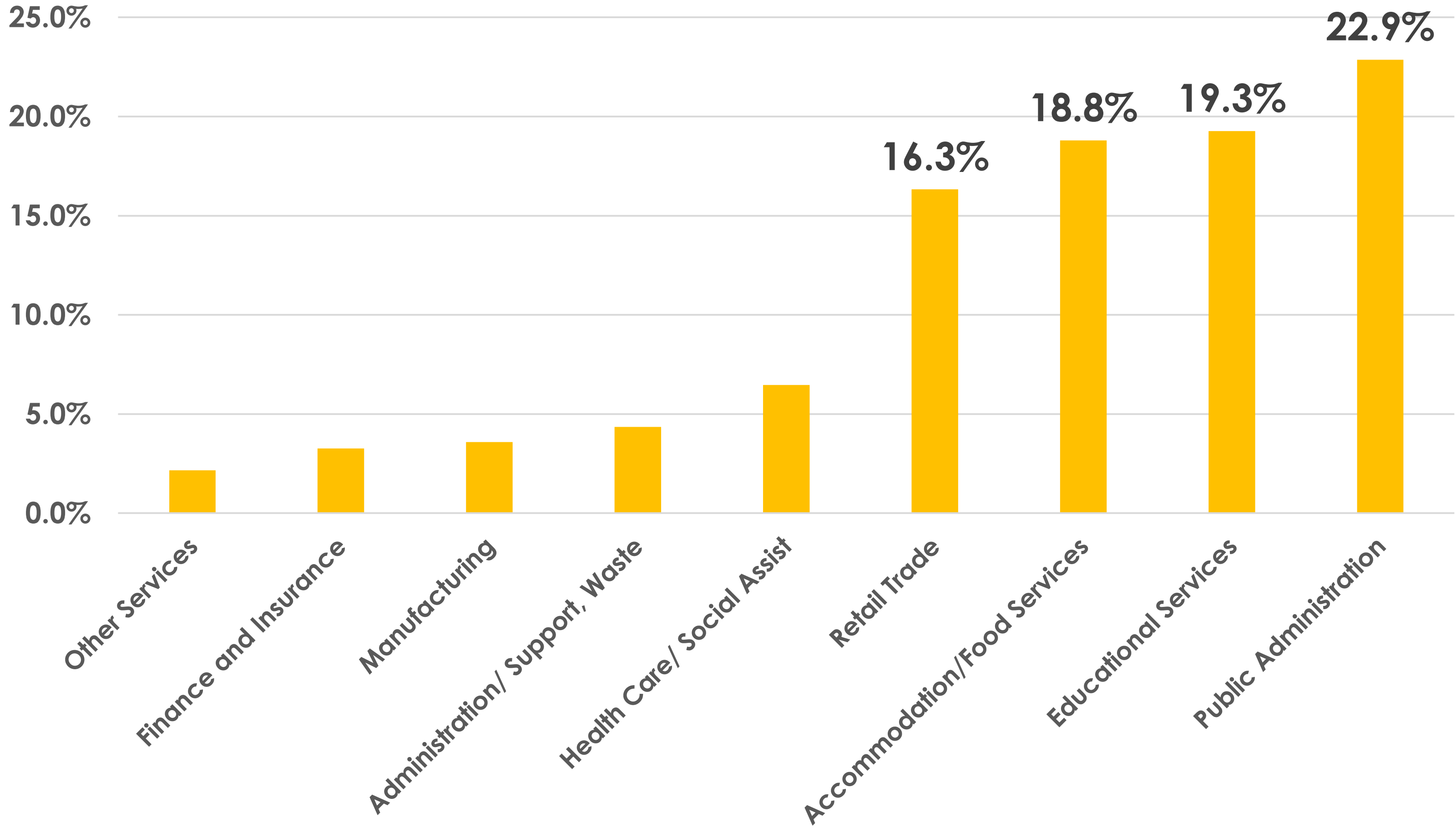
PRIMARY TRADE AREA

- Biggest downtown population in the County and stabilizing
- Lowest median age
- Highest concentration of college students
- Increase in both Millennial and Baby Boomer age groups
- Diverse population with rising household incomes

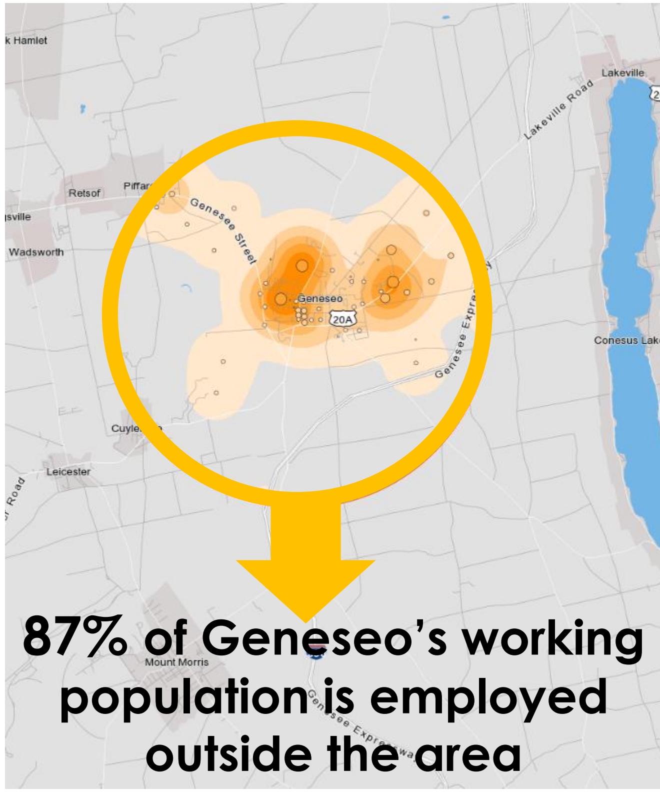
Workforce Profile

Source: LEHD OnTheMap Census Bureau 2014

Total No. of Workers: 4,662



Resident to Worker Ratio



87% of Geneseo's working population is employed outside the area

This customer is likely able to do most of his/her shopping in town after 6pm

GENESEO

Source: ESRI Business Analyst Online 2017

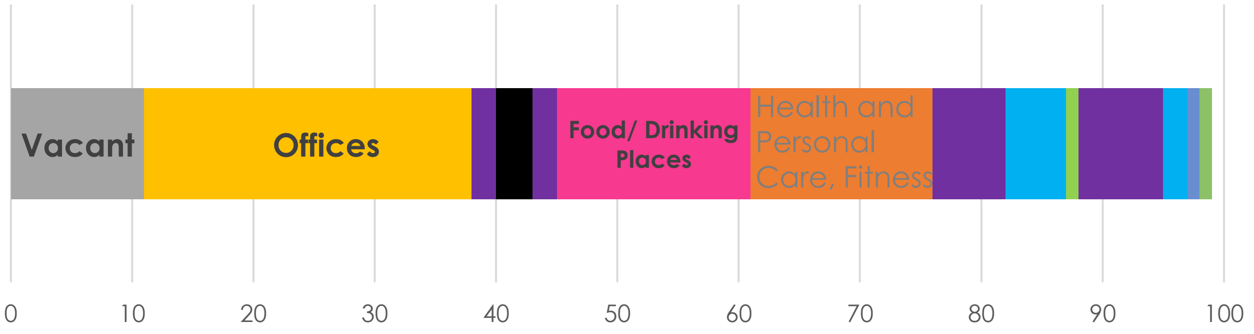
	2010	2017	2022
Total Population	770,392	779,350	784,668
Median Age	38.0	39.1	39.8
Population aged 25-44 (Millennials)	24.8%	24.7%	25.4%
Population aged 64> (Baby Boomers)	13.6%	16.4%	18.6%
Non-Institutionalized Group Quarters		3.0%	
Median Household Income		$52,831	$55,111
White Alone Population	77.5%	75.5%	74.1%
Black Population	14.4%	14.9%	15.2%
Asian Population	2.9%	3.4%	3.8%
Hispanic Population	6.7%	8.2%	9.4%
Bachelors/ Graduate/ Prof Degrees		34.0%	
Top Tapestry Segments	Rustbelt Traditions (7.4%) Salt of the Earth (7.2%) City Commons (6.5%) Traditional Living (6.5%) Midlife Constants (6.2%)		

SECONDARY TRADE AREA

- Higher median age
- Higher proportion of Millennials and Baby Boomers
- Slightly higher median household incomes
- Much more diverse population – larger proportion of Black population and Hispanic population although smaller Asian population
- Smaller educated population

Passive Storefront Rate	**43%**
Vacancy Rate	**11%**
Active Storefront Rate	**57%**

No. of Storefronts



Geneseo has a low vacancy rate and active retail environment catering to locals and visitors

- Many storefronts are filled with professional service offices
- This is well-balanced by a large proportion of food and drinking places

Retail Gap Analysis – Primary TA

-$101,517,791 total retail trade + food and drink surplus

Source: ESRI Business Analyst Online 2017

Residents spent over $79.6 million on retail and food and drink in 2016.

However, this total expenditure only made up 43% of the total retail sales in Geneseo.

Retail Leakage + Potential SF – Primary TA

Source: LOA; ESRI Business Analyst Online 2017; ICSC Shopping Mall Sales Productivity (Mid Atlantic region)

Retail Category	Retail Gap	100% CR	60% CR	40% CR
Used Merchandise Stores	$206,115	995	597	398
Office Supplies, Stationery & Gift Stores	$513,257	1,661	997	664
Clothing & Clothing Accessories Stores	$823,969	2,315	1,389	926
Furniture & Home Furnishings Stores	$2,297,786	5,832	3,499	2,333
Health & Personal Care Stores	$5,363,646	6,179	3,708	2,472
	TOTAL:	**16,982**	**10,189**	**6,793**

Based on resident spending alone, Geneseo does not have much potential to grow its retail offerings.

Furniture & Home Furnishings and Health and Personal Care stores are categories that may still grow in downtown Geneseo.

Retail Gap Analysis – Secondary TA

-$1,290,520,021 total retail trade + food and drink surplus

Source: ESRI Business Analyst Online 2017

Residents spent over **$11.05 billion** on retail and food and drink in 2016.

This total expenditure only made up **90%** of the total retail sales in the 30 mile radius.

Retail Leakage + Potential SF – Secondary TA

Source: LOA; ESRI Business Analyst Online 2017; ICSC Shopping Mall Sales Productivity (Mid Atlantic region)

Retail Category	Retail Gap	100% CR	20% CR	10% CR
Florists	$15,294,617	56,479	11,296	5,648
Specialty Food Stores	$19,508,263	32,406	6,481	3,241
Electronics & Appliance Stores	$25,922,322	7,862	1,572	786
Office Supplies, Stationery & Gift Stores	$35,633,620	115,319	23,064	11,532
Miscellaneous Store Retailers	$66,008,091	128,171	25,634	12,817
Clothing & Clothing Accessories Stores	$184,029,835	516,938	103,388	51,694
Health & Personal Care Stores	$252,805,944	291,251	58,250	29,125
TOTAL POTENTIAL SF:		1,148,427	229,685	114,843

Based on resident spending in the secondary trade area, Geneseo may have some potential to grow its retail offerings in Health and Personal Care Stores, Clothing and Accessories stores, and Miscellaneous Stores.

ANCHORS + RETAIL MIX

- Strong antique cluster
- Located close to tourist draw – State Park
- Well-maintained and curated storefronts and facades
- Pedestrian environment challenged by truck traffic
- Underutilized theater building

MOUNT MORRIS

Source: ESRI Business Analyst Online 2017

	2010	2017	2022	
Total Population	4,219	4,238	4,220	
Median Age	42.3	43.9	44.9	⬆
Population aged 25-44 (Millennials)	23.4%	24.3%	24.1%	
Population aged 64> (Baby Boomers)	18.3%	21.2%	24.0%	⬆
Vacant Housing Units	11.3%	12.7%	14.4%	⬆
Median Household Income		$40,172	$42,395	⬆
White Alone Population	92.9%	90.3%	88.5%	⇩
Hispanic Population	8.3%	12.3%	15.3%	⬆
Top Tapestry Segments	Small Town Simplicity (53.4%) Down the Road (22.7%) Heartland Communities (10.3%)			

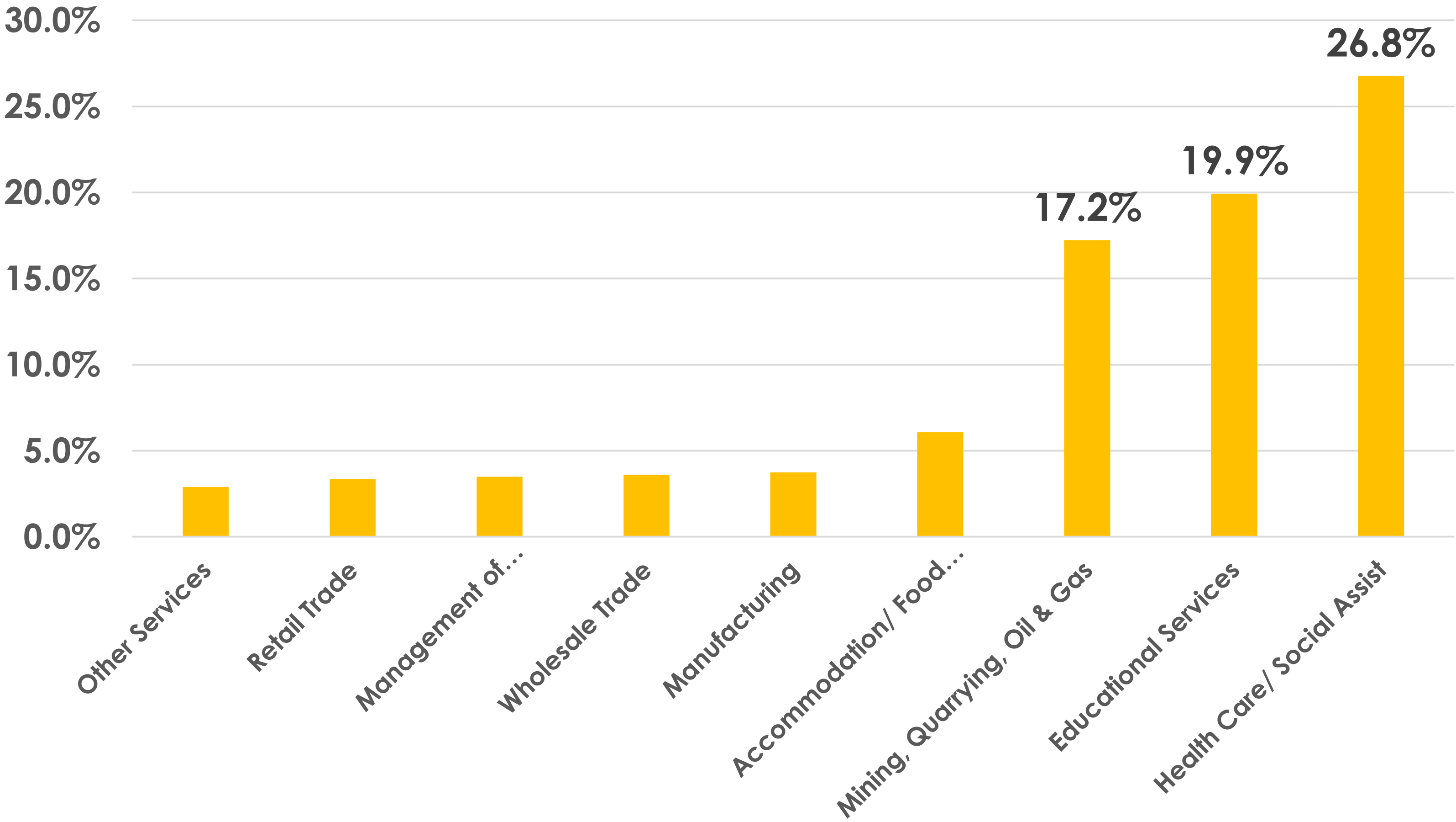
PRIMARY TRADE AREA

- High rate of housing vacancy
- Large increase in Baby Boomer age group
- Rising median household incomes
- Diverse population with highest proportion of Hispanic population in the County

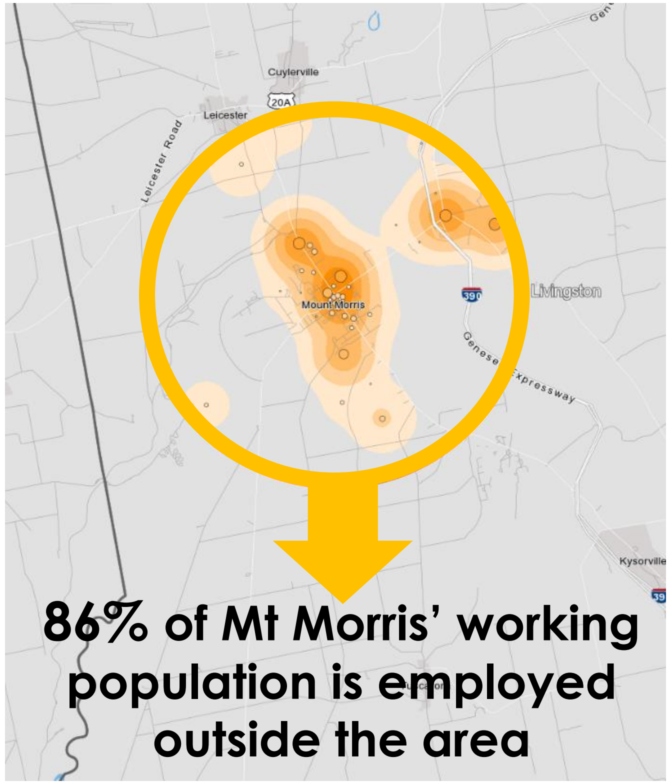
Workforce Profile

Source: LEHD OnTheMap Census Bureau 2014

Total No. of Workers: 1,550



Resident to Worker Ratio



86% of Mt Morris' working population is employed outside the area

This customer is likely able to do most of his/her shopping in town after 6pm

MOUNT MORRIS

Source: ESRI Business Analyst Online 2017

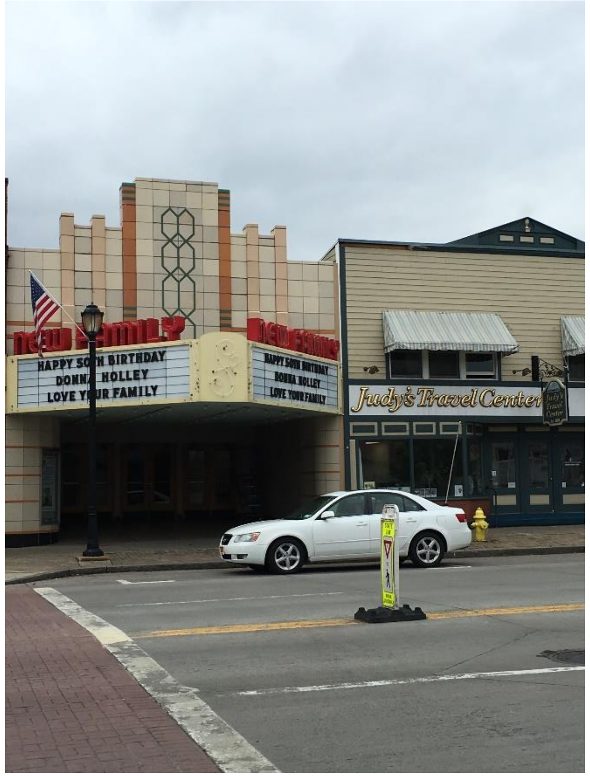
	2010	2017	2022
Total Population	347,143	351,831	353,194
Median Age	40.3	41.3	42.0
Population aged 25-44 (Millennials)	23.1%	23.2%	23.9%
Population aged 64> (Baby Boomers)	14.4%	17.3%	19.9%
Vacant Housing Units	11.1%	11.4%	12.3%
Median Household Income		$58,618	$62,628
White Alone Population	90.4%	88.4%	87.0%
Black Population	4.2%	4.9%	5.3%
Hispanic Population	2.7%	3.7%	4.4%
Top Tapestry Segments	Salt of the Earth (15.95) Green Acres (8.6%) Midlife Constants (7.6%) Rustbelt Traditions (7.3%) Traditional Living (6.0%)		

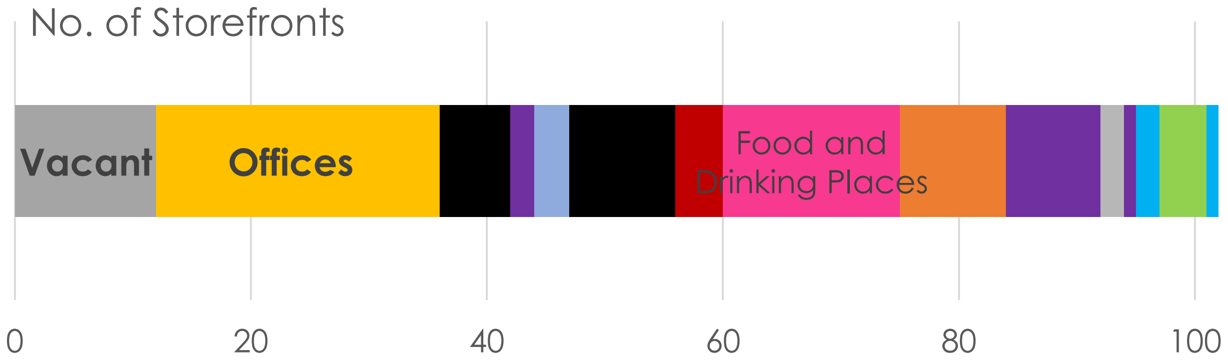
SECONDARY TRADE AREA

- Lower rate of housing vacancy
- Large increase in Baby Boomer age group
- Much higher median household incomes
- Diverse population

MOUNT MORRIS

Passive Storefront Rate	55%
Vacancy Rate	12%
Active Storefront Rate	45%





Mount Morris has a vibrant daytime retail environment

- However, many storefronts are filled with professional service, government services, and non-profit offices that break the retail continuity

Retail Gap Analysis – Primary TA

$22,357,719 total retail trade + food and drink leakage

Source: ESRI Business Analyst Online 2017

Residents spent over $46.7 million on retail and food and drink in 2016.

About 48% of this expenditure was spent outside of downtown Mount Morris.

Retail Leakage + Potential SF – Primary TA

Source: LOA; ESRI Business Analyst Online 2017; ICSC Shopping Mall Sales Productivity (Mid Atlantic region)

Retail Category	Retail Gap	100% CR	60% CR	40% CR
Florists	$81,517	301	181	120
Sporting Goods, Hobby, Book & Music Stores	$213,226	931	559	372
Office Supplies, Stationery & Gift Stores	$382,996	1,239	744	496
Miscellaneous Store Retailers	$1,281,636	2,489	1,493	995
Electronics & Appliance Stores	$1,459,096	443	266	177
Health & Personal Care Stores	$1,609,487	1,854	1,113	742
Bldg Materials, Garden Equip. & Supply Stores	$2,691,141	14,164	8,498	5,666
General Merchandise Stores	$2,936,654	5,369	3,221	2,147
Clothing & Clothing Accessories Stores	$3,034,423	8,524	5,114	3,409
Grocery Stores	$3,600,959	5,824	3,494	2,330
TOTAL:		**41,137**	**24,682**	**16,455**

Based on resident spending alone, Mount Morris has the potential to grow its retail offerings by 16,000-24,000 SF.

Building materials and garden supplies stores, general merchandise stores, clothing and accessories stores, and a small format grocery store are categories that may still grow in Mount Morris.

Retail Gap Analysis – Secondary TA

-$1,082,299,316 total retail trade + food and drink surplus

Source: ESRI Business Analyst Online 2017

Residents spent over $5.06 billion on retail and food and drink in 2016.

This total expenditure only made up 82% of total retail sales within the 30 mile radius.

Retail Leakage + Potential SF – Secondary TA

Source: LOA; ESRI Business Analyst Online 2017; ICSC Shopping Mall Sales Productivity (Mid Atlantic region)

Retail Category	Retail Gap	100% CR	20% CR	10% CR
Office Supplies, Stationery & Gift Stores	$8,535,659	27,623	5,525	2,762
Florists	$9,816,885	36,251	7,250	3,625
Electronics & Appliance Stores	$33,881,698	10,277	2,055	1,028
Miscellaneous Store Retailers	$41,949,589	81,456	16,291	8,146
Clothing & Clothing Accessories Stores	$69,643,475	195,628	39,126	19,563
Health & Personal Care Stores	$150,713,148	173,633	34,727	17,363
	TOTAL:	**524,867**	**104,973**	**52,487**

Based on resident spending in the secondary trade area, Mount Morris has the potential to grow its retail offerings by 52,000-104,000 SF.

Health & Personal Care Stores, Clothing and Accessories Stores, and Miscellaneous Stores are categories that may meet the demand of visitors to Mount Morris.

DANSVILLE

- Food and Drinking Places
- Civic Institutions
- Grocery Store
- Average Daily Traffic Count
- General Merch
- Specialty Store
- Entertainment

- Retail corridor sprawled across 1,200 linear feet
- Well-maintained sidewalks
- Various food and drinking places
- Future anchor: new brewery
- Major employers located close to downtown

DANSVILLE

Source: ESRI Business Analyst Online 2017

	2010	2017	2022
Total Population	6,511	6,414	6,345
Median Age	41.6	42.9	43.3
Population aged 25-44 (Millennials)	23.4%	23.0%	23.6%
Population aged 64> (Baby Boomers)	15.2%	17.9%	20.1%
Vacant Housing Units	8.2%	10.3%	12.4%
Median Household Income		$40,474	$40,982
White Alone Population	96.0%	94.8%	93.9%
Hispanic Population	2.0%	3.0%	3.8%
Top Tapestry Segments	Small Town Simplicity (33.8%) Traditional Living (19.3%) Rustbelt Traditions (18.6%)		

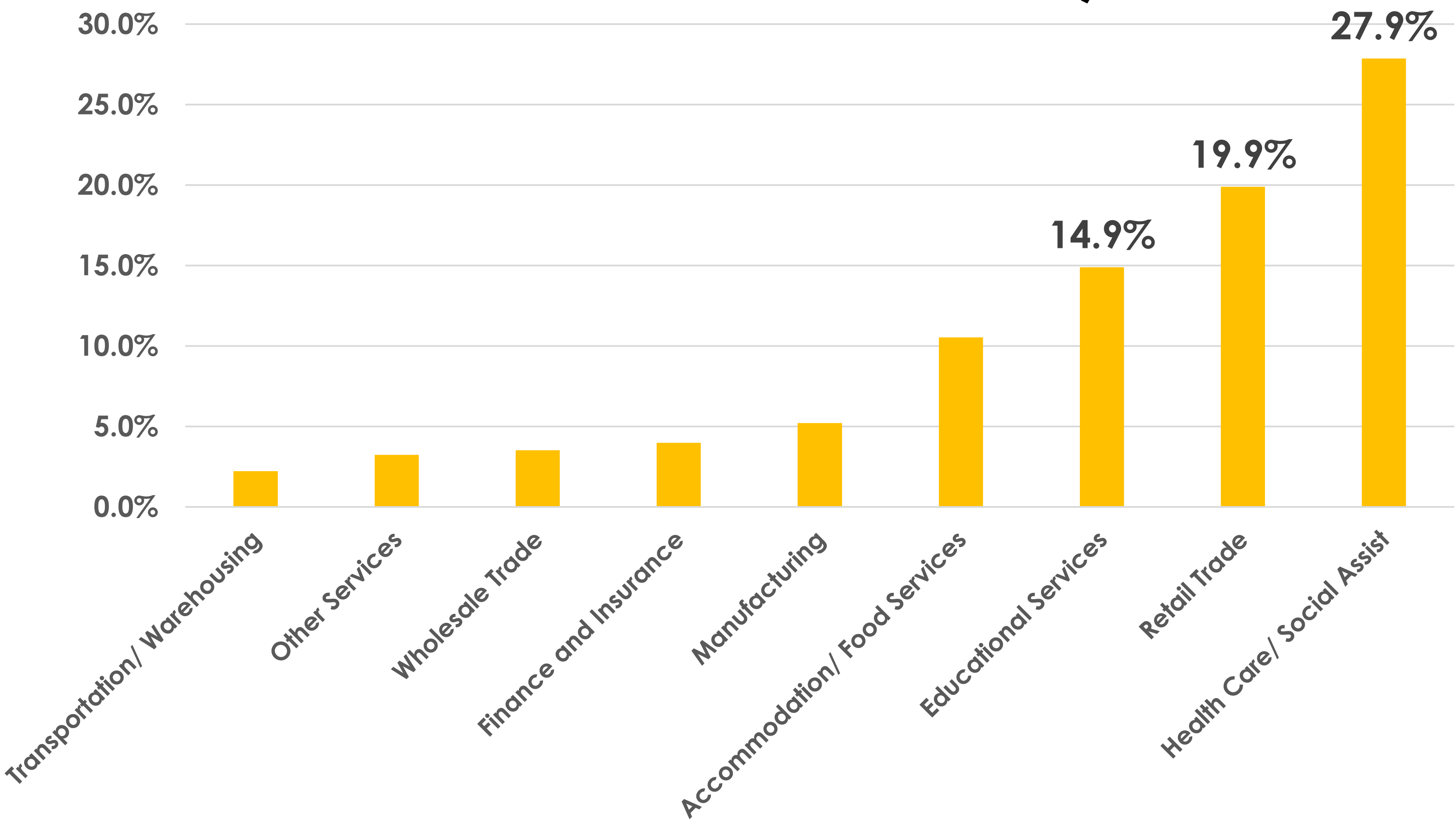
PRIMARY TRADE AREA

- High rate of housing vacancy
- Large increase in Baby Boomer age group
- Predominantly White population with growing proportion of Hispanic population

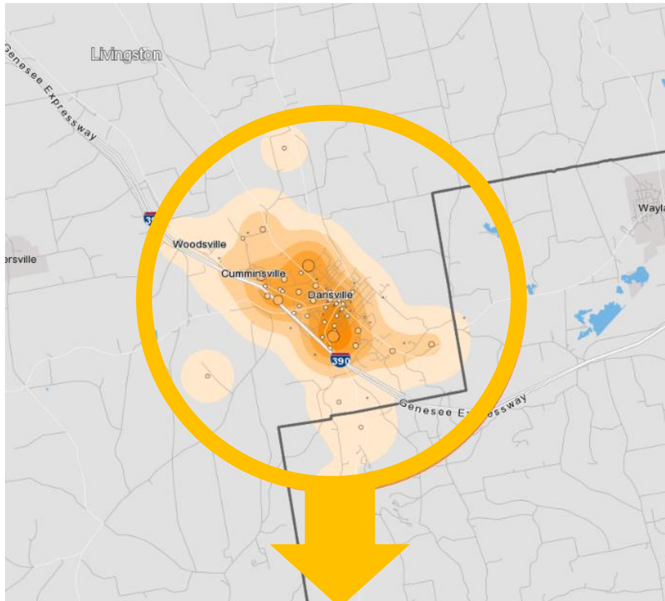
Workforce Profile

Source: LEHD OnTheMap Census Bureau 2014

Total No. of Workers: 2,382



Resident to Worker Ratio



79% of Dansville's working population is employed outside the area

This customer is likely able to do most of his/her shopping in town after 6pm

DANSVILLE

Source: ESRI Business Analyst Online 2017

	2010	2017	2022
Total Population	201,221	201,638	200,563
Median Age	41.3	42.7	43.6
Population aged 25-44 (Millennials)	21.6%	21.6%	22.0%
Population aged 64> (Baby Boomers)	15.0%	18.4%	21.3%
Vacant Housing Units	19.2%	20.1%	21.6%
Median Household Income		$52,443	$55,163
White Alone Population	95.6%	94.4%	93.6%
Hispanic Population	1.9%	2.7%	3.3%
Top Tapestry Segments	Small Town Simplicity (33.8%) Traditional Living (19.3%) Rustbelt Traditions (18.6%) Salt of the Earth (9.8%) The Great Outdoors (9.6%)		

SECONDARY TRADE AREA

- High rate of housing vacancy
- Large increase in Baby Boomer age group
- Predominantly White population with growing proportion of Hispanic population

Passive Storefront Rate	**48%**
Vacancy Rate	**17%**
Active Storefront Rate	**52%**

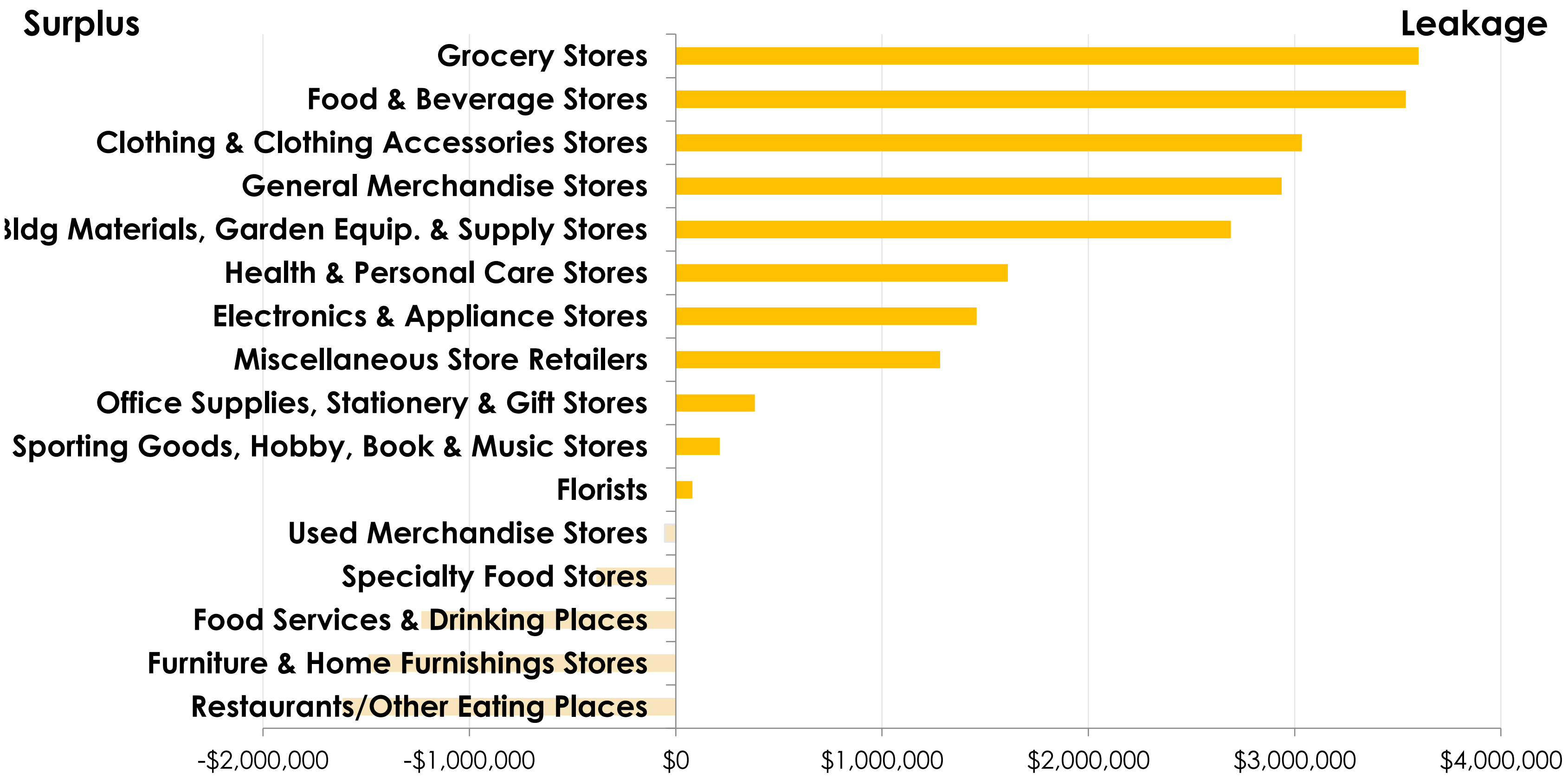
Dansville has a high rate of vacant storefronts

- This is likely due to the lack of investment by building owners, resulting in non-viable storefronts for potential businesses

Retail Gap Analysis – Primary TA

-$29,241,452 total retail trade + food and drink surplus

Source: ESRI Business Analyst Online 2017



Residents spent over $74.1 million on retail and food and drink in 2016.

However, this total expenditure only made up 72% of the total retail sales in Dansville.

Retail Leakage + Potential SF – Primary TA

Source: LOA; ESRI Business Analyst Online 2017; ICSC Shopping Mall Sales Productivity (Mid Atlantic region)

Retail Category	Retail Gap	100% CR	60% CR	40% CR
Florists	$53,963	199	120	80
Specialty Food Stores	$266,339	442	265	177
Office Supplies, Stationery & Gift Stores	$479,492	1,552	931	621
Miscellaneous Store Retailers	$561,346	1,090	654	436
Electronics & Appliance Stores	$766,034	232	139	93
Sporting Goods, Hobby, Book & Music Stores	$1,126,366	4,919	2,951	1,967
Furniture & Home Furnishings Stores	$1,957,921	4,969	2,982	1,988
General Merchandise Stores	$3,012,267	5,507	3,304	2,203
Clothing & Clothing Accessories Stores	$4,704,305	13,214	7,929	5,286
	TOTAL:	**32,125**	**19,275**	**12,850**

Based on resident spending alone, Dansville can potentially grow its retail offerings by 12,000- 19,000 SF.

Sporting goods and hobby stores, general merchandise stores, clothing and accessories stores, and home furnishings stores are categories that may still grow in Dansville.

DANSVILLE

Retail Gap Analysis – Secondary TA

$429,286,800 total retail trade + food and drink leakage

Source: ESRI Business Analyst Online 2017

Residents spent over $2.7 billion on retail and food and drink in 2016.

16% of this total expenditure was spent outside the 30-mile trade area.

Retail Leakage + Potential SF – Secondary TA

Source: LOA; ESRI Business Analyst Online 2017; ICSC Shopping Mall Sales Productivity (Mid Atlantic region)

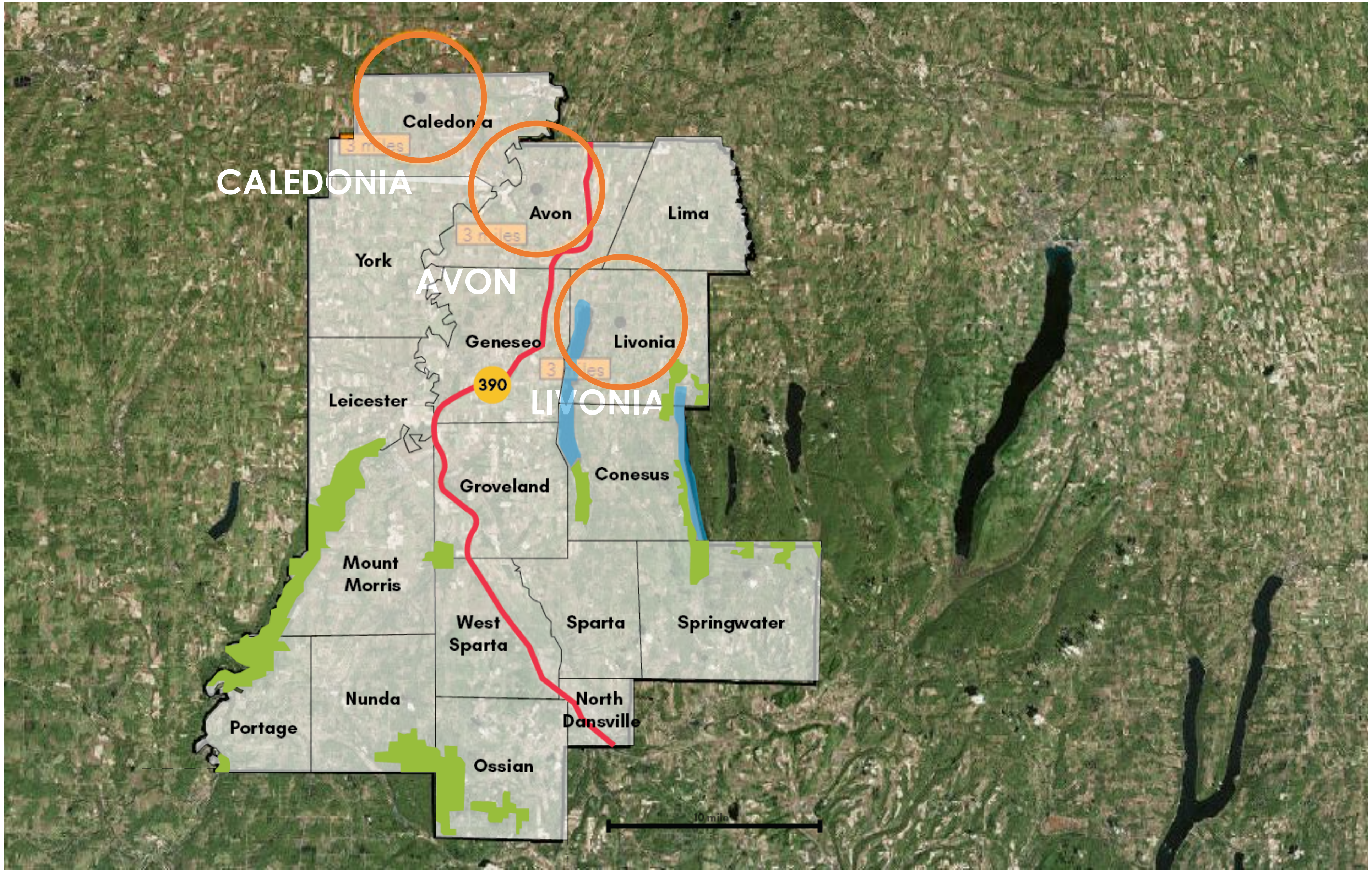
Retail Category	Retail Gap	100% CR	20% CR	10% CR
Florists	$4,925,077	18,187	3,637	1,819
Office Supplies, Stationery & Gift Stores	$23,946,106	77,495	15,499	7,750
Sporting Goods, Hobby, Book & Music Stores	$27,817,310	121,473	24,295	12,147
Bldg Materials, Garden Equip. & Supply Stores	$34,980,156	184,106	36,821	18,411
Miscellaneous Store Retailers	$48,382,839	93,947	18,789	9,395
Electronics & Appliance Stores	$54,682,502	16,586	3,317	1,659
Furniture & Home Furnishings Stores	$56,446,066	143,264	28,653	14,326
Restaurants/Other Eating Places	$72,644,909	132,806	26,561	13,281
Food Services & Drinking Places	$89,452,311	140,427	28,085	14,043
Health & Personal Care Stores	$109,392,526	126,028	25,206	12,603
General Merchandise Stores	$116,733,680	213,407	42,681	21,341
Clothing & Clothing Accessories Stores	$164,976,989	463,419	92,684	46,342
TOTAL POTENTIAL SF:		**1,731,146**	**346,229**	**173,115**

Based on resident spending in the secondary trade area, Dansville can potentially grow its retail offerings by 100,000- 300,000 SF.

General merchandise stores, clothing and accessories stores, health and personal care stores, and food services are categories that may still grow in Dansville.

PRIMARY TRADE AREA: 3-mile radius

MEDIUM



PRIMARY TRADE AREA: 3-MILE RADIUS

Demographic, workforce, and retail leakage data presented in the following pages were pulled from the corresponding downtown three-mile trade areas.

Source: ESRI Business Analyst Online 2017

ANCHORS + RETAIL MIX

- Uphill slope separates Genesee St from W Main Street
- Village Green Roundabout challenged by truck traffic and speeding vehicles
- Underutilized buildings falling into disrepair at retail core
- Characterized by passive storefronts filled with offices and service businesses

AVON

Source: ESRI Business Analyst Online 2017

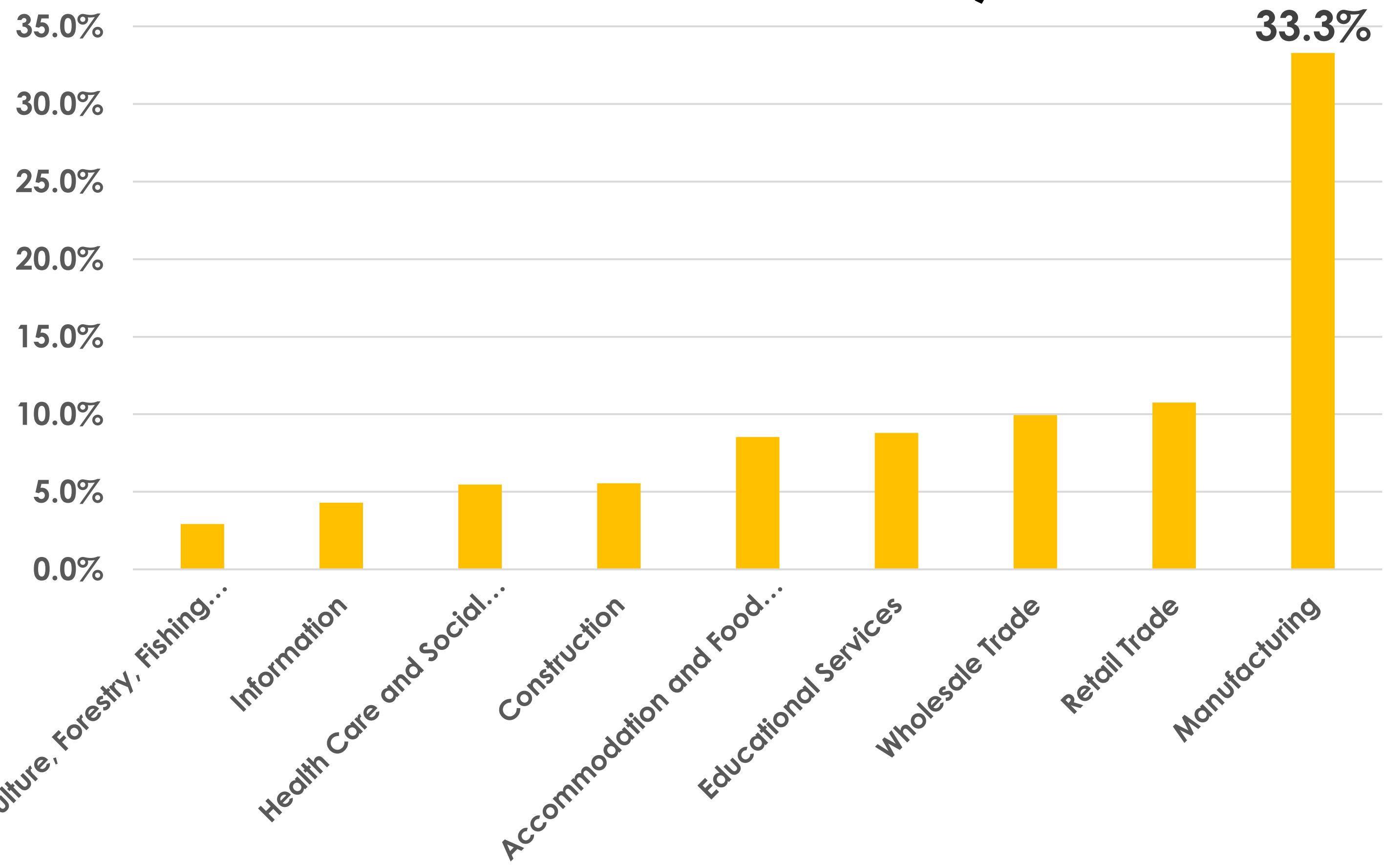
	2010	2017	2022
Total Population	5,570	5,508	5,465
Median Age	42.0	43.1	43.8
Population aged 25-44 (Millennials)	24.5%	23.6%	23.1%
Population aged 64> (Baby Boomers)	15.8%	18.5%	20.9%
Median Household Income		$63,803	$71,085
Vacant Housing Units	3.7%	5.8%	7.9%
White Alone Population	95.1%	93.7%	92.5%
Hispanic Population	2.4%	3.6%	4.6%
Top Tapestry Segments	Parks and Rec (38.8%) Old and Newcomers (23.3%) Green Acres (17.4%) Salt of the Earth (15.1%)		

- Overall, bigger population size and stabilizing
- Fall in Millennial population but large growth in Baby Boomer age group
- High median household incomes
- Diversifying population with rising household incomes

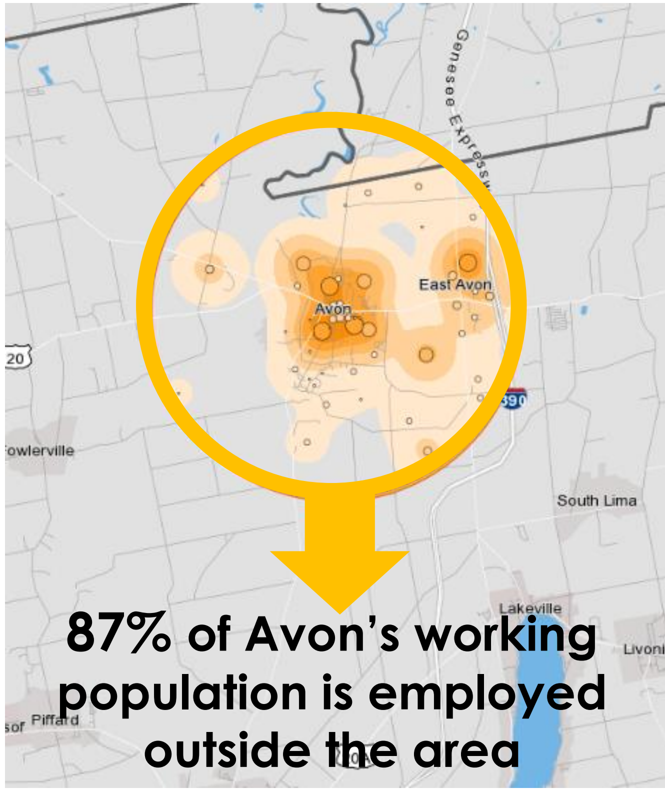
Workforce Profile

Source: LEHD OnTheMap Census Bureau 2014

Total No. of Workers: 2,704



Resident to Worker Ratio



87% of Avon's working population is employed outside the area

This customer is likely able to do most of his/her shopping in town after 6pm

Passive Storefront Rate	**46%**
Vacancy Rate	**21%**
Active Storefront Rate	**54%**

Avon has a passive retail environment

- Many storefronts, if not vacant, are filled with professional service offices and health care offices
- Large, vacant former theater building located in retail core

Retail Gap Analysis

-$41,669,401 total retail trade + food and drink surplus

Source: ESRI Business Analyst Online 2017

Residents spent over $78.9 million on retail and food and drink in 2016.

However, this total expenditure only made up 65% of the total retail sales in Avon.

Retail Leakage + Potential SF

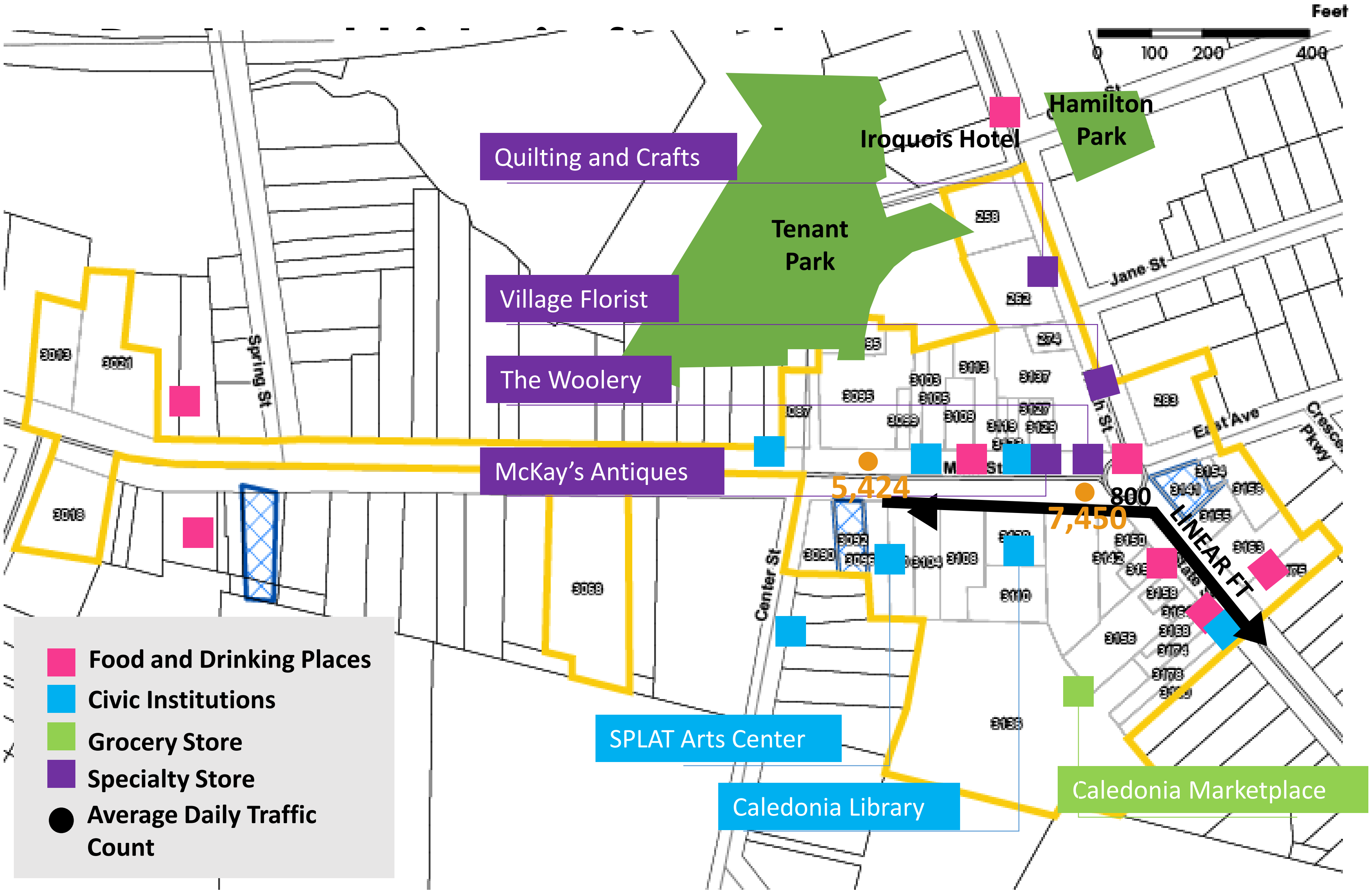
Source: LOA; ESRI Business Analyst Online 2017; ICSC Shopping Mall Sales Productivity (Mid Atlantic region)

Retail Category	Retail Gap	100% CR	60% CR	40% CR
Food Services & Drinking Places	$34,267	54	32	22
Used Merchandise Stores	$140,590	679	407	272
Florists	$163,033	602	361	241
Bldg Materials, Garden Equip. & Supply Stores	$204,526	1,076	646	431
Specialty Food Stores	$453,927	754	452	302
Sporting Goods, Hobby, Book & Music Stores	$764,738	3,339	2,004	1,336
Office Supplies, Stationery & Gift Stores	$820,120	2,654	1,592	1,062
Miscellaneous Store Retailers	$1,146,266	2,226	1,335	890
Furniture & Home Furnishings Stores	$2,095,705	5,319	3,191	2,128
Electronics & Appliance Stores	$2,639,284	801	480	320
Clothing & Clothing Accessories Stores	$5,681,848	15,960	9,576	6,384
General Merchandise Stores	$7,467,825	13,652	8,191	5,461
	TOTAL:	47,117	28,270	18,847

Based on resident spending alone, Avon has the potential to grow its retail offerings between 18,000-28,000 SF.

Furniture & Home Furnishings, Clothing & Accessories, and General Merchandise are categories with the greatest retail opportunity.

ANCHORS + RETAIL MIX



- Existing art and antique niche in retail
- Anchored by Caledonia Malls – strip mall with convenience businesses
- Walkability of retail environment challenged by roundabout

CALEDONIA

Source: ESRI Business Analyst Online 2017

	2010	2017	2022
Total Population	4,403	4,339	4,307
Median Age	44.1	46.0	46.0
Population aged 25-44 (Millennials)	21.5%	22.1%	24.2%
Population aged 64> (Baby Boomers)	14.7%	18.5%	21.8%
Median Household Income		$59,067	$62,455
Vacant Housing Units	5.6%	7.3%	9.2%
White Alone Population	95.4%	94.3%	93.4%
Black Population	2.4%	2.9%	3.2%
Hispanic Population	1.5%	2.3%	2.9%
Top Tapestry Segments	Rustbelt Traditions (34.8%) Green Acres (34.7%) Midlife Constants (22.7%)		

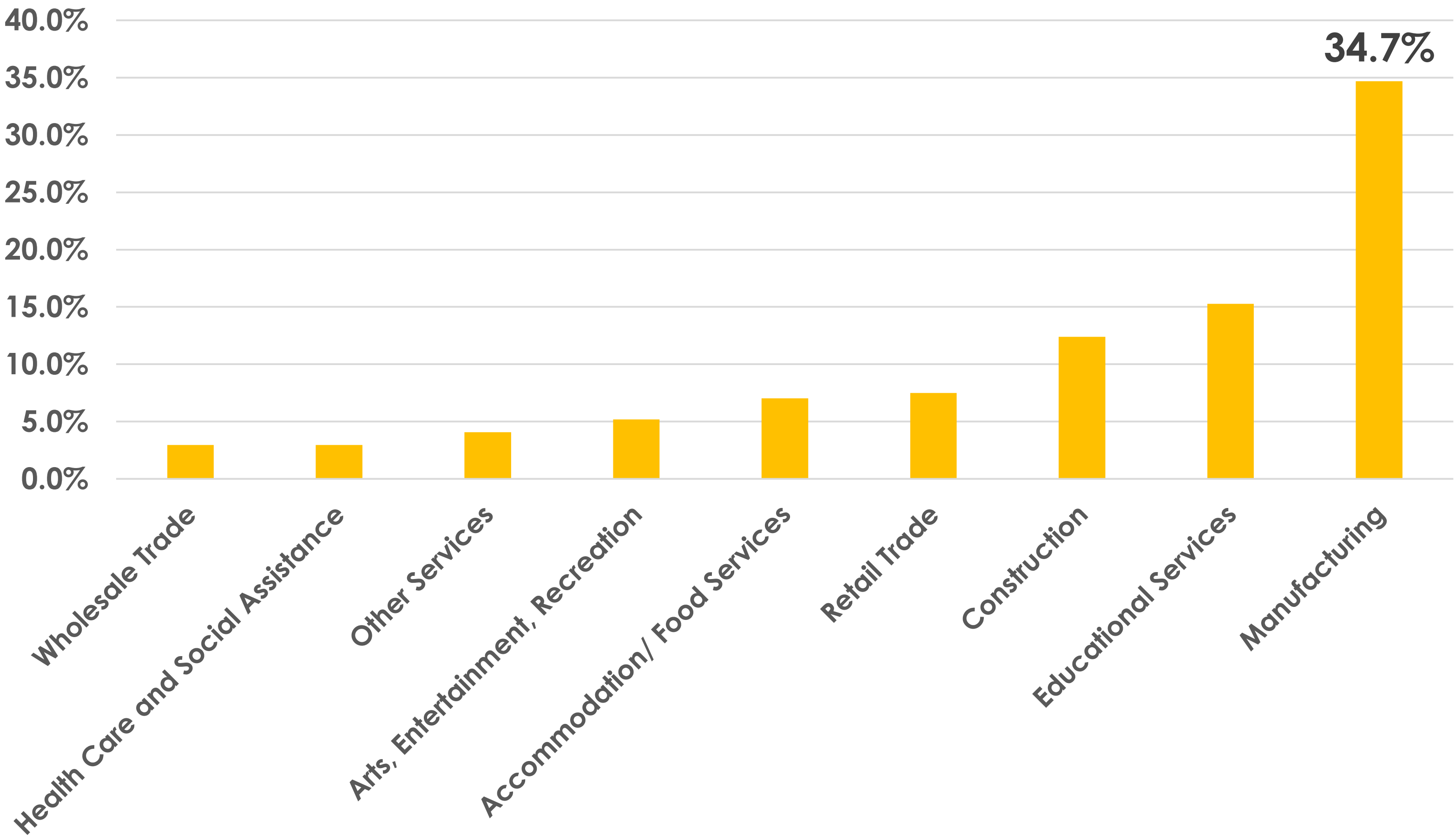
- Decline in population from 2010 levels
- Growth in Millennial and Baby Boomer age groups - about 46% of the total population
- Diversifying population with rising household incomes

CALEDONIA

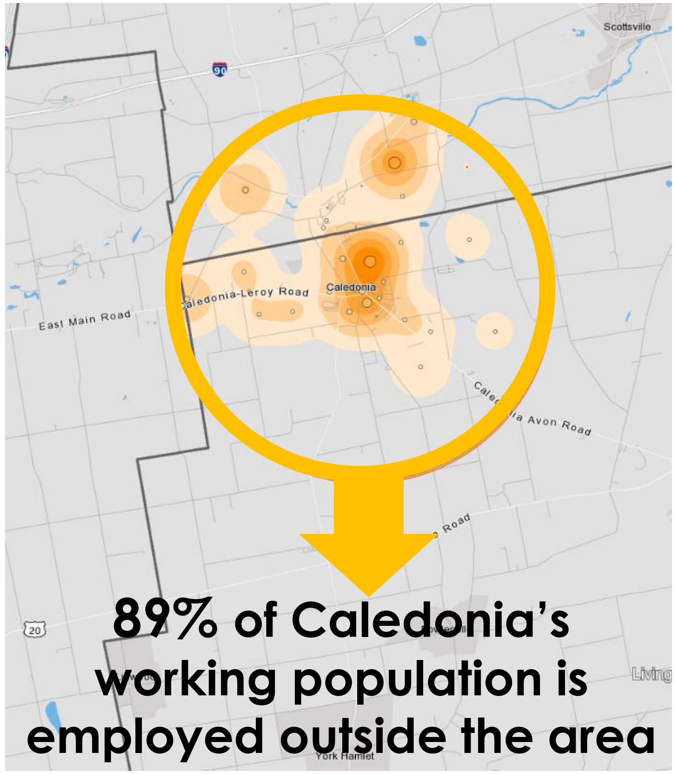
Workforce Profile

Source: LEHD OnTheMap Census Bureau 2014

Total No. of Workers: 1,081



Resident to Worker Ratio

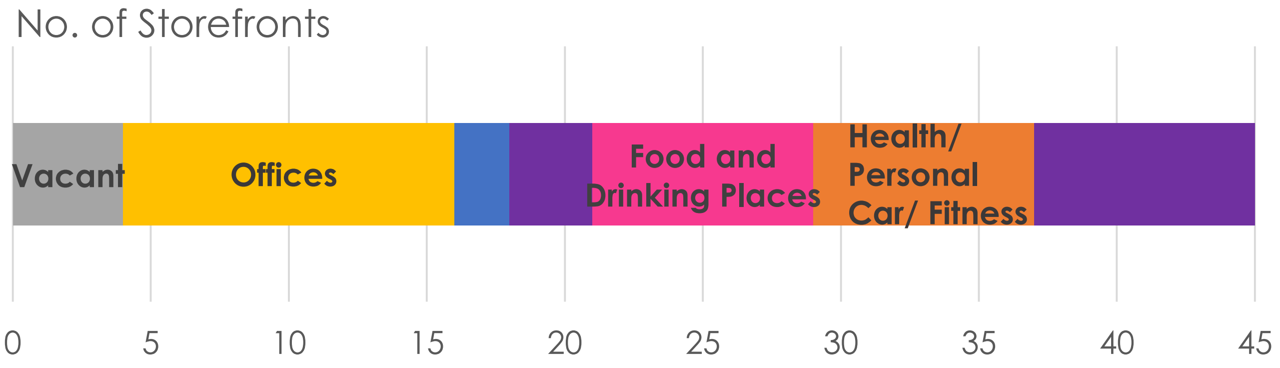


89% of Caledonia's working population is employed outside the area

This customer is likely able to do most of his/her shopping in town after 6pm

CALEDONIA

Passive Storefront Rate	38%
Vacancy Rate	9%
Active Storefront Rate	62%



Caledonia has a booming retail environment

- Only downtown with a full-service grocery store and pharmacy within the retail core
- Growing scene of arts-related businesses downtown

Retail Gap Analysis

$31,382,816 total retail trade + food and drink leakage

Source: ESRI Business Analyst Online 2017

Residents spent over $60.1 million on retail and food and drink in 2016.

52% of this total expenditure was spent outside Caledonia.

Retail Leakage + Potential SF

Source: LOA; ESRI Business Analyst Online 2017; ICSC Shopping Mall Sales Productivity (Mid Atlantic region)

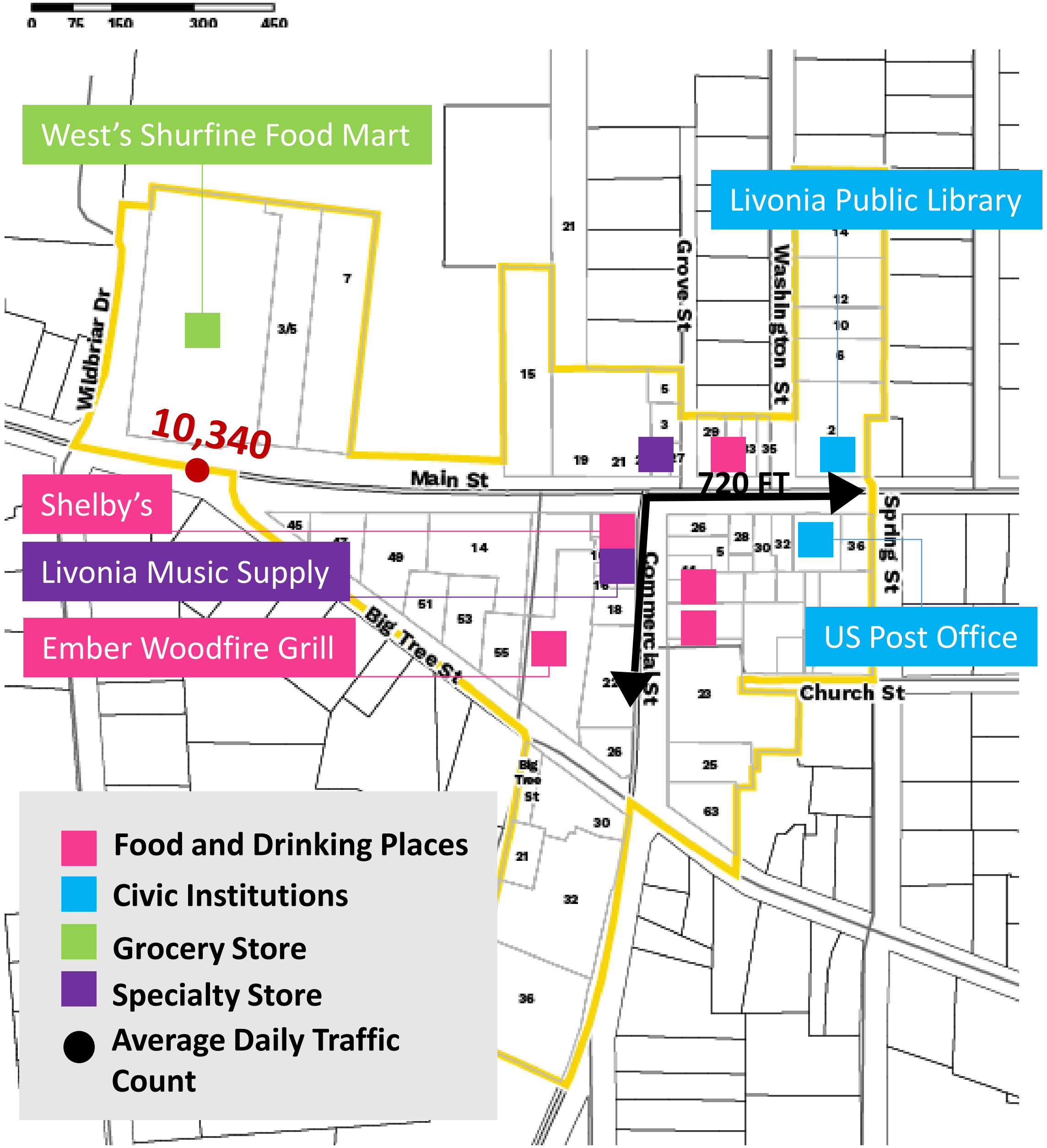
Retail Category	Retail Gap	100% CR	60% CR	40% CR
Grocery Stores	$103,958	168	101	67
Office Supplies, Stationery & Gift Stores	$554,116	1,793	1,076	717
Specialty Food Stores	$621,872	1,033	620	413
Sporting Goods, Hobby, Book & Music Stores	$715,781	3,126	1,875	1,250
Bldg Materials, Garden Equip. & Supply Stores	$1,095,430	5,765	3,459	2,306
Miscellaneous Store Retailers	$1,236,033	2,400	1,440	960
Furniture & Home Furnishings Stores	$1,394,424	3,539	2,123	1,416
Food & Beverage Stores	$1,492,087			
Electronics & Appliance Stores	$1,998,816	606	364	243
Health & Personal Care Stores	$2,742,580	3,160	1,896	1,264
Restaurants/Other Eating Places	$3,261,759	5,963	3,578	2,385
Food Services & Drinking Places	$3,828,071	6,010	3,606	2,404
Clothing & Clothing Accessories Stores	$4,299,105	12,076	7,246	4,830
General Merchandise Stores	$6,005,956	10,980	6,588	4,392
	TOTAL	56,619	33,971	22,648

Based on resident spending alone, Caledonia has the potential to grow its retail offerings between 22,000-34,000 SF.

Food Services and drinking places, and clothing and accessories, are categories with the greatest retail opportunity.

ANCHORS + RETAIL MIX

- High average daily traffic going thru Main Street
- Strong seasonal second home population by the lake
- Full-time residents treat Livonia as a bedroom community to Rochester



LIVONIA

Source: ESRI Business Analyst Online 2017

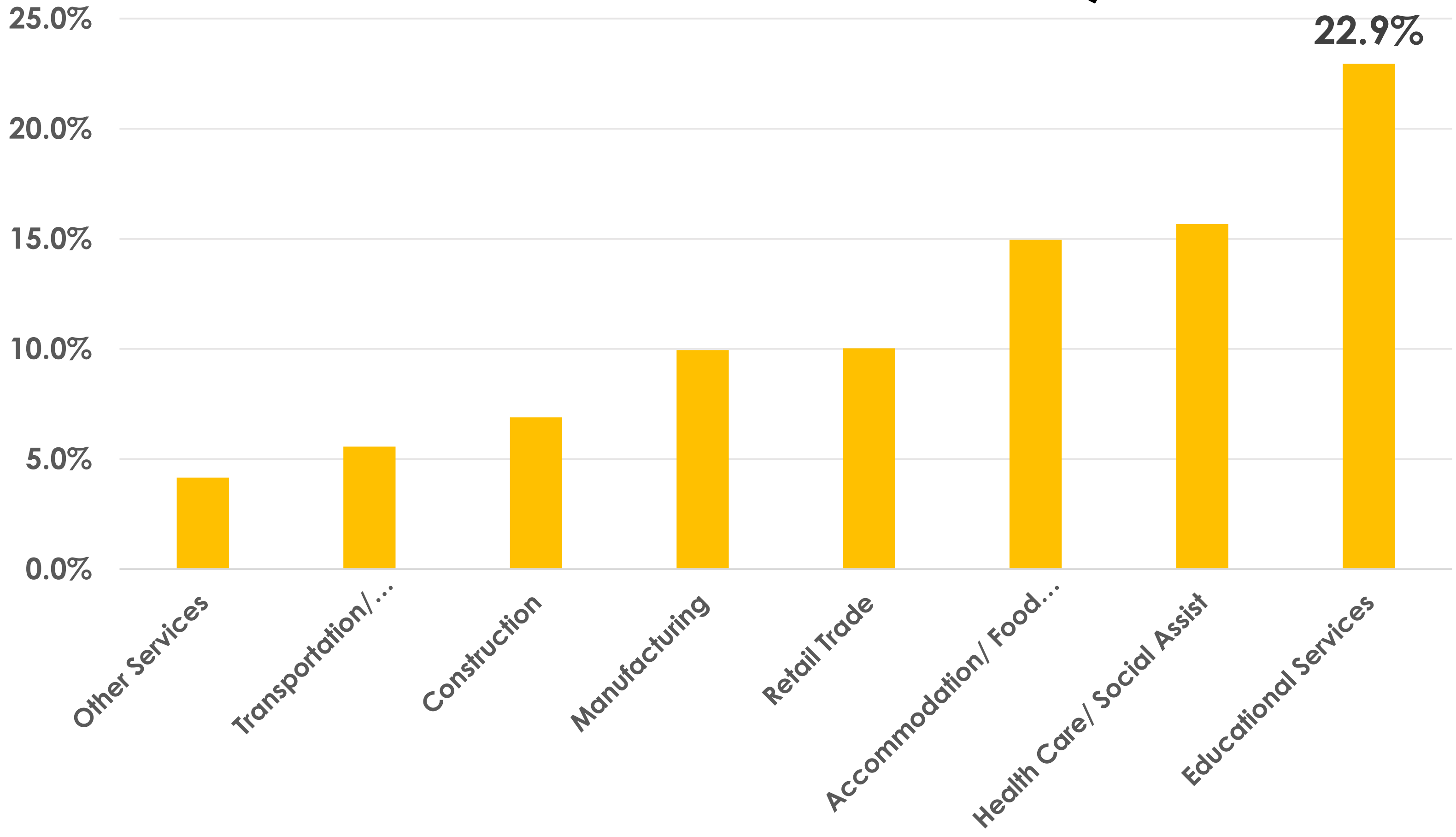
	2010	2017	2022	
Total Population	6,594	6,637	6,646	⬆
Median Age	41.6	43.1	42.8	⬆
Population aged 25-44 (Millennials)	23.5%	22.7%	24.5%	⬆
Population aged 64> (Baby Boomers)	13.6%	16.9%	19.0%	⬆
Median Household Income		$68,563	$76,720	⬆
Vacant Housing Units	13.8%	15.1%	16.6%	⬆
White Alone Population	97.2%	96.6%	96.0%	⇩
Hispanic Population	1.1%	1.6%	2.0%	⬆
Top Tapestry Segments	Green Acres (39.7%) Middleburg (30.7%) Parks and Rec (23.8%)			

- Overall population stabilizing
- **Growth in Millennial and Baby Boomer age groups - about 43.5% of the total population**
- Predominantly White population with high median household incomes

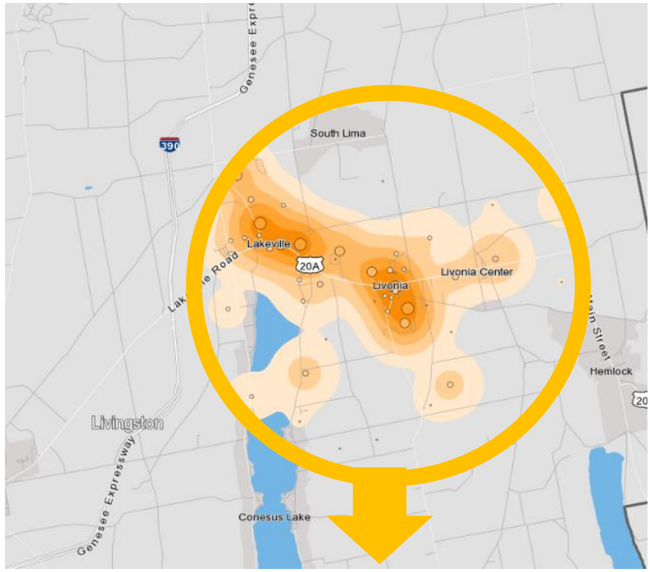
Workforce Profile

Source: LEHD OnTheMap Census Bureau 2014

Total No. of Workers: 1,277



Resident to Worker Ratio

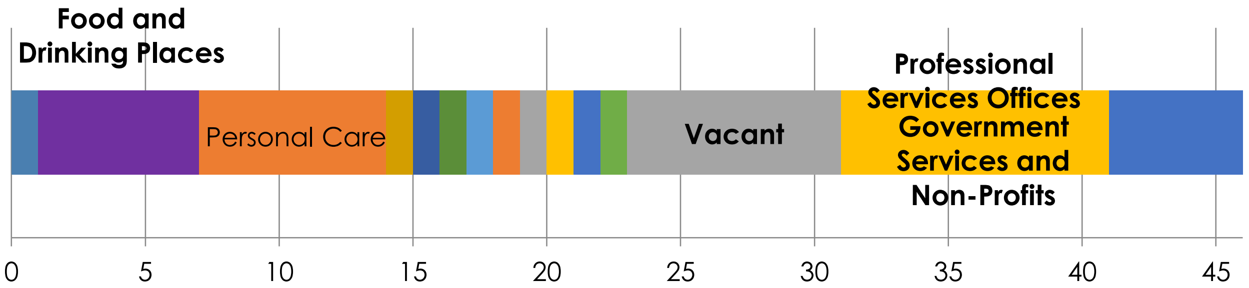


89% of Livonia's working population is employed outside the area

This customer is likely able to do most of his/her shopping in town after 6pm

Passive Storefront Rate	50%
Vacancy Rate	17%
Active Storefront Rate	50%

No. of Storefronts



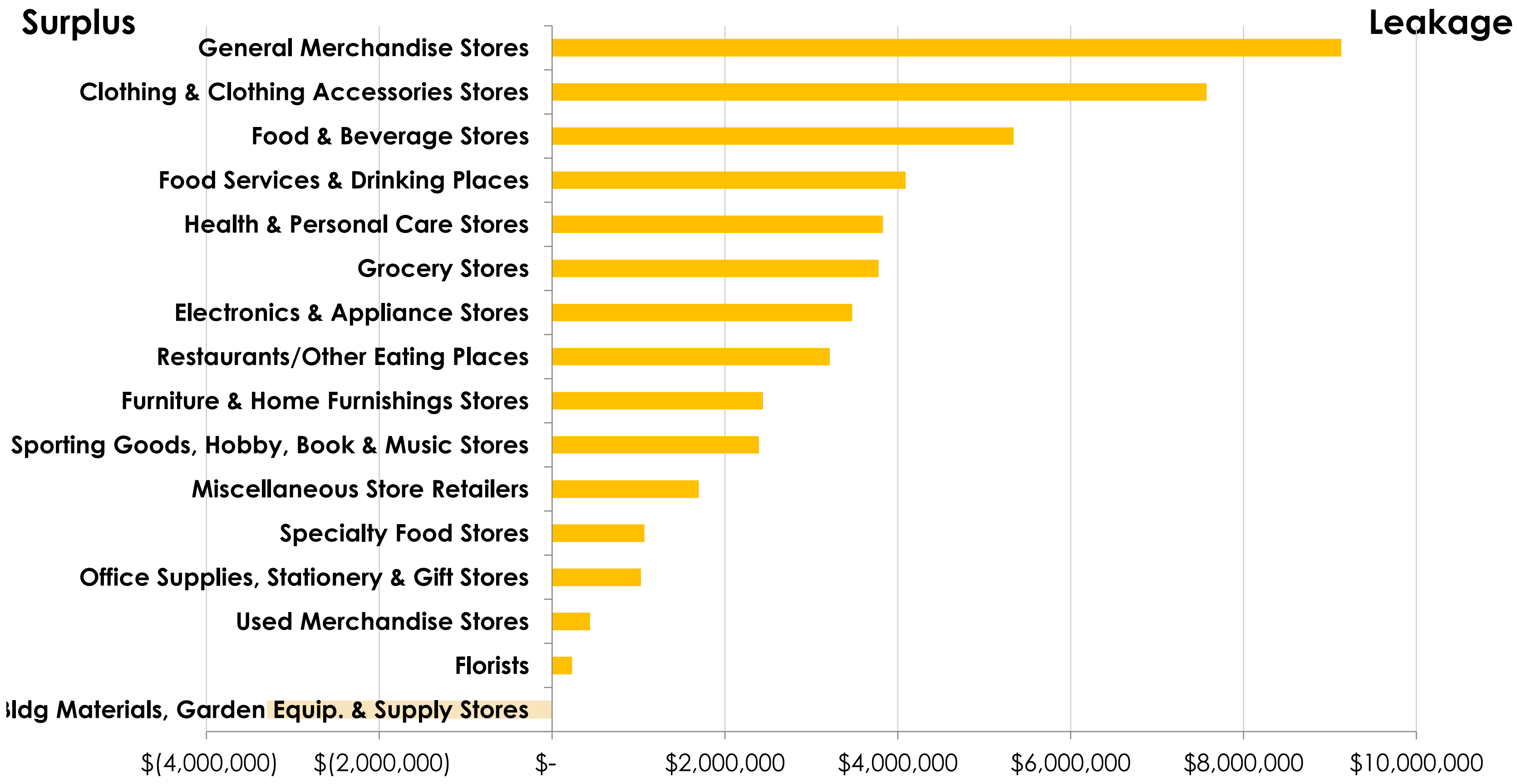
Livonia has a passive retail environment

- Despite a large number of available storefronts, many are used for professional services or left vacant
- Few food and drinking places anchor the downtown

Retail Gap Analysis

$56,708,964 total retail trade + food and drink leakage

Source: ESRI Business Analyst Online 2017



Residents spent over **$103.6 million** on retail and food and drink in 2016.

55% of this total expenditure was spent outside Livonia.

Retail Leakage + Potential SF

Source: LOA; ESRI Business Analyst Online 2017; ICSC Shopping Mall Sales Productivity (Mid Atlantic region)

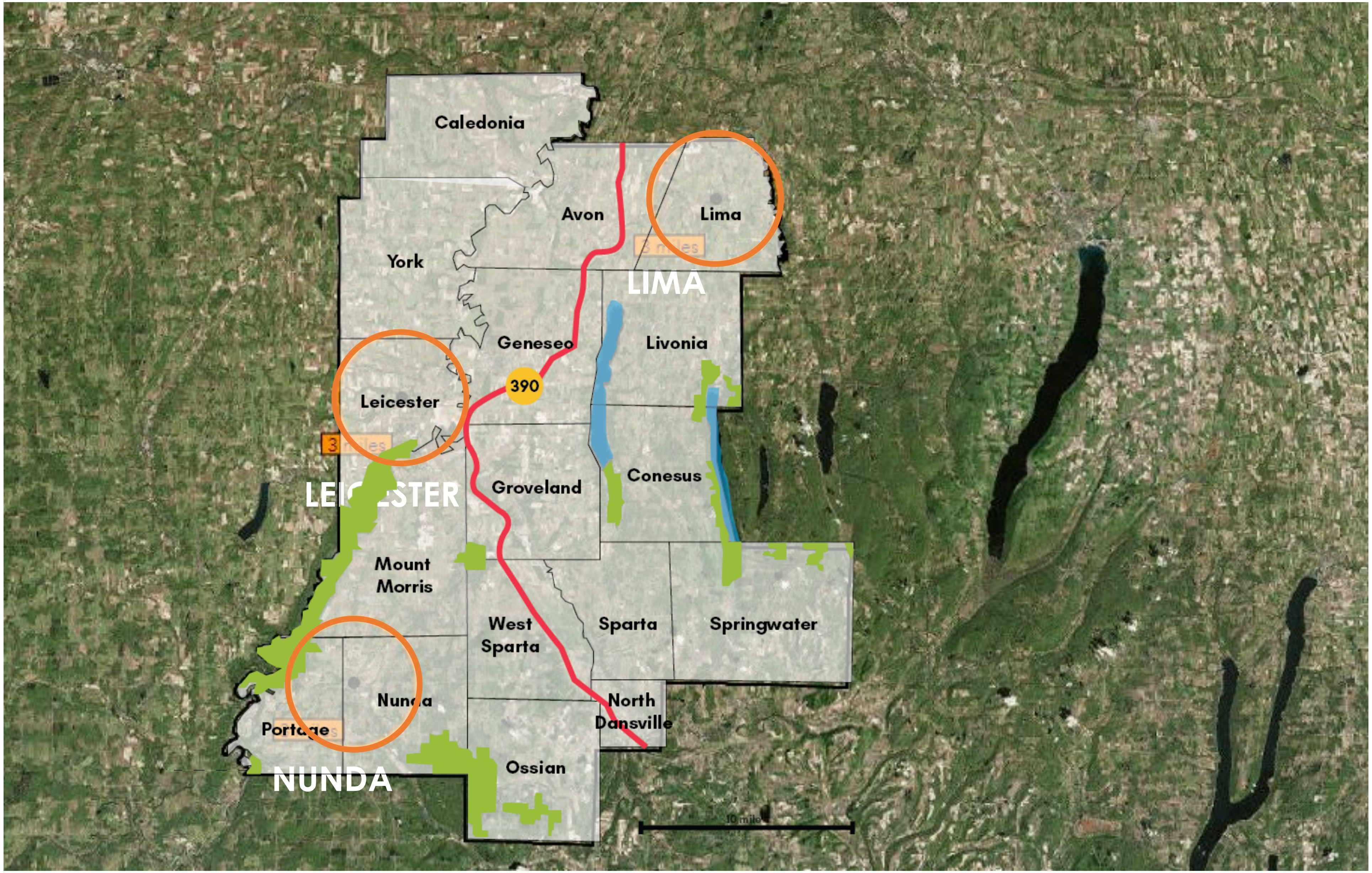
Retail Category	Total Leakage	Potential SF	60% Capture Rate (SF)	40% Capture Rate (SF)
Florists	$ 233,632	863	518	345
Used Merchandise Stores	$ 441,573	2,132	1,279	853
Office Supplies, Stationery & Gift Stores	$ 1,030,080	3,334	2,000	1,333
Specialty Food Stores	$ 1,068,992	1,776	1,065	710
Miscellaneous Store Retailers	$ 1,699,398	3,300	1,980	1,320
Sporting Goods, Hobby, Book & Music Stores	$ 2,394,775	10,458	6,275	4,183
Furniture & Home Furnishings Stores	$ 2,442,089	6,198	3,719	2,479
Restaurants/Other Eating Places	$ 3,215,623	5,879	3,527	2,351
Electronics & Appliance Stores	$ 3,473,520	1,054	632	421
Grocery Stores	$ 3,779,577	6,113	3,668	2,445
Health & Personal Care Stores	$ 3,830,226	4,413	2,648	1,765
Food Services & Drinking Places	$ 4,092,695	6,425	3,855	2,570
Clothing & Clothing Accessories Stores	$ 7,574,466	12,766	8,511	4,255
General Merchandise Stores	$ 9,134,781	10,020	6,680	3,340
	TOTAL SF:	**89,919**	**53,951**	**35,968**

Based on resident spending alone, Livonia has the potential to grow its retail offerings between 36,000-54,000 SF.

Food Services and drinking places, clothing and accessories, and general merchandise stores are categories with the greatest retail opportunity.

PRIMARY TRADE AREA: 3-mile radius

SMALL



Source: ESRI Business Analyst Online 2017

PRIMARY TRADE AREA: 3-MILE RADIUS

Demographic, workforce, and retail leakage data presented in the following pages were pulled from the corresponding downtown three-mile trade areas.

ANCHORS + RETAIL MIX

- Well-served by competitive general merchandise and grocery stores just outside of downtown
- No offerings catering to visitors to nearby Letchworth State Park – mostly convenience goods at the pharmacy and take-out food

NUNDA

Source: ESRI Business Analyst Online 2017

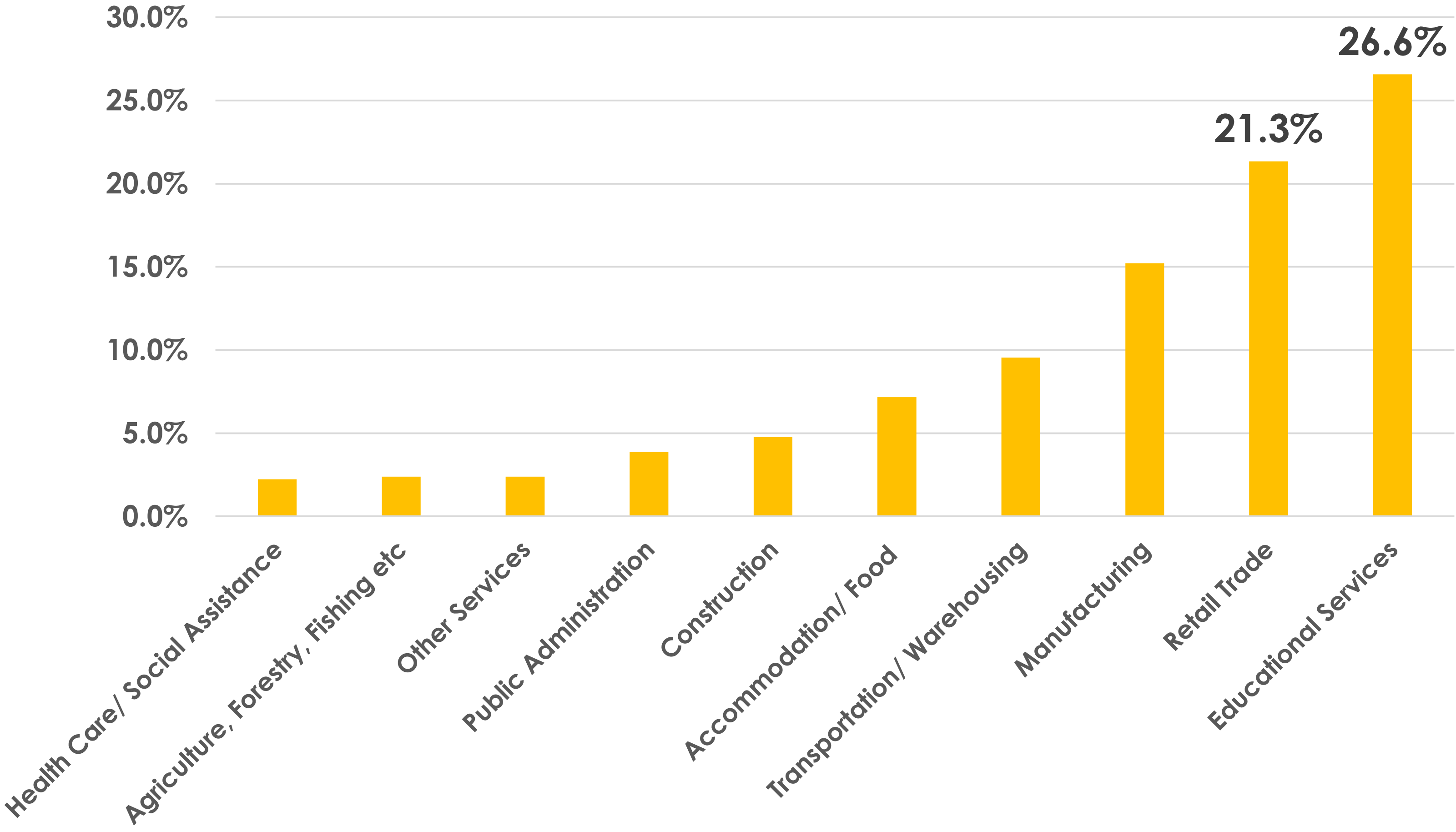
	2010	2017	2022
Total Population	2,892	2,863	2,845
Median Age	41.7	43.4	44.6
Population aged 25-44 (Millennials)	23.7%	22.9%	22.7%
Population aged 64> (Baby Boomers)	15.9%	18.3%	21.1%
Median Household Income		$43,106	$46,136
Vacant Housing Units	6.6%	8.0%	10.0%
White Alone Population	97.5%	96.8%	96.2%
Hispanic Population	1.4%	2.1%	2.8%
Top Tapestry Segments	Heartland Communities (59.2%) Rooted Rural (15.7%) Southern Satellites (12.7%)		

- Overall smallest population in the County - stabilizing between 2010 and 2022
- 33% spike in Baby Boomer age group from 2010 levels with rising median age
- Predominantly White population with lower median household incomes

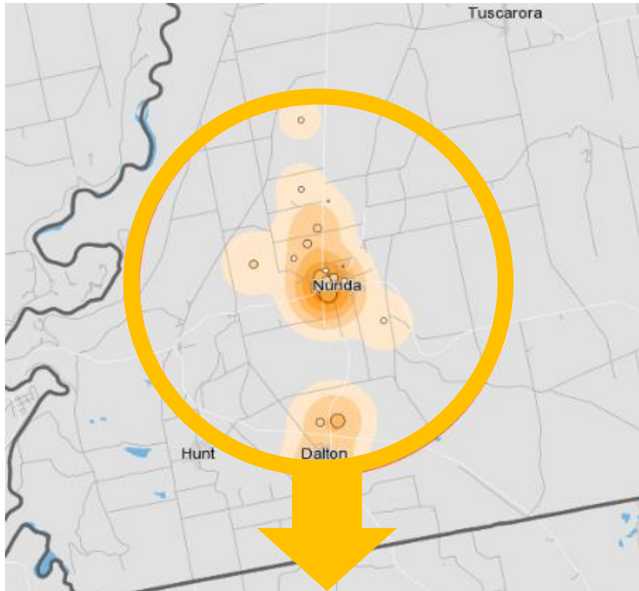
Workforce Profile

Source: LEHD OnTheMap Census Bureau 2014

Total No. of Workers: 670



Resident to Worker Ratio



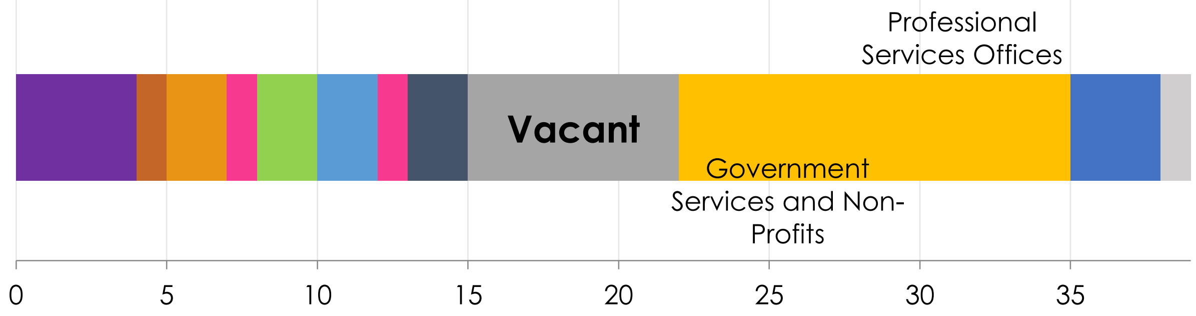
82% of Nunda's working population is employed outside the area

This customer is likely able to do most of his/her shopping in town after 6pm

NUNDA

Passive Storefront Rate	63%
Vacancy Rate	17%
Active Storefront Rate	37%

No. of Storefronts



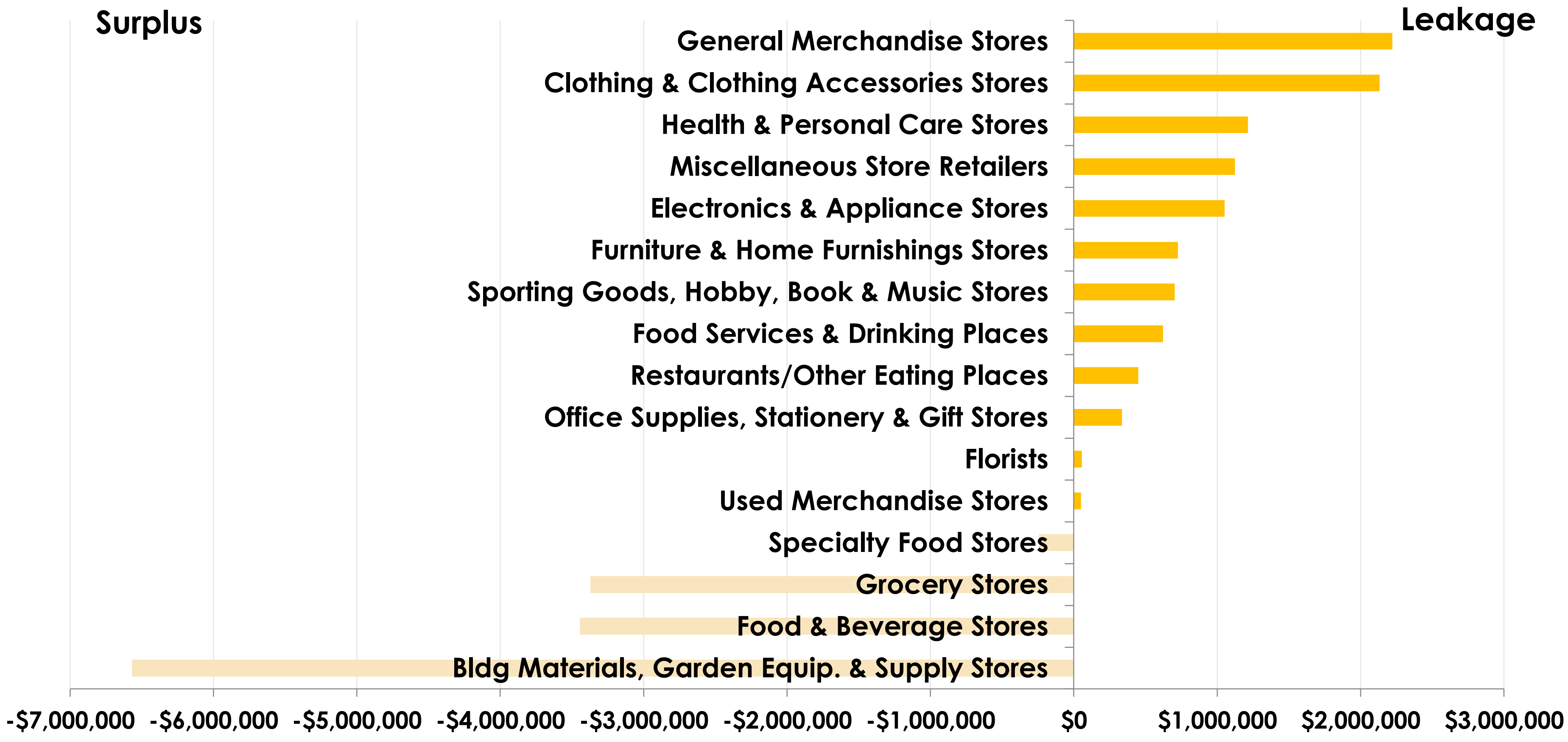
Nunda has an under-utilized retail environment

- Only a third of storefronts in Nunda is active despite its proximity to Letchworth State Park
- Merchants do not maintain transparent, inviting storefronts

Retail Gap Analysis

$7,542,840 total retail trade + food and drink leakage

Source: ESRI Business Analyst Online 2017



Residents spent over $34.7 million on retail and food and drink in 2016.

22% of this total expenditure was spent outside Nunda.

Retail Leakage + Potential SF

Source: LOA; ESRI Business Analyst Online 2017; ICSC Shopping Mall Sales Productivity (Mid Atlantic region)

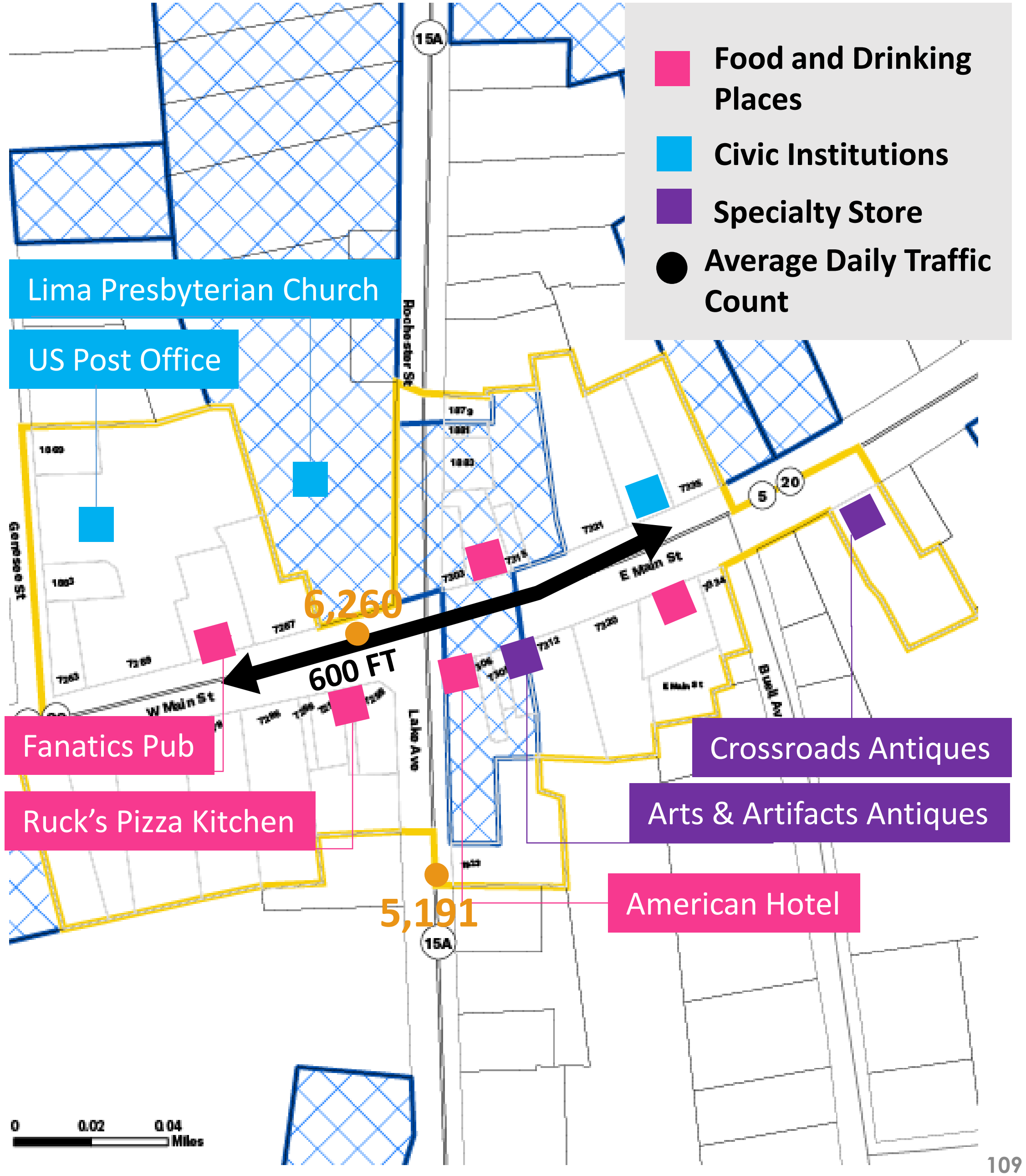
Retail Category	Total Leakage	Potential SF	60% Capture Rate (SF)	40% Capture Rate (SF)
Used Merchandise Stores	$50,350	243	146	97
Florists	$55,238	204	122	82
Office Supplies, Stationery & Gift Stores	$336,592	1,089	654	436
Restaurants/Other Eating Places	$450,611	824	494	330
Food Services & Drinking Places	$622,424	977	586	391
Sporting Goods, Hobby, Book & Music Stores	$702,618	3,068	1,841	1,227
Furniture & Home Furnishings Stores	$726,554	1,844	1,106	738
Electronics & Appliance Stores	$1,051,048	319	191	128
Miscellaneous Store Retailers	$1,123,750	2,182	1,309	873
Health & Personal Care Stores	$1,213,854	1,398	839	559
Clothing & Clothing Accessories Stores	$2,132,206	5,989	3,594	2,396
General Merchandise Stores	$2,220,899	4,060	2,436	1,624
TOTAL SF:		**22,198**	**13,319**	**8,879**

Based on resident spending alone, Nunda has very limited potential to grow its retail offerings between 9,000-13,000 SF.

Sporting goods/hobby, clothing and accessories, and general merchandise stores are categories with the greatest retail opportunity.

ANCHORS + RETAIL MIX

- Widely known as a 'bedroom community' of Rochester
- Located on antiques route with some offerings on East Main St
- Lost a local grocery store recently



Prepared by Larisa Ortiz Associates – November 2017

LIMA

Source: ESRI Business Analyst Online 2017

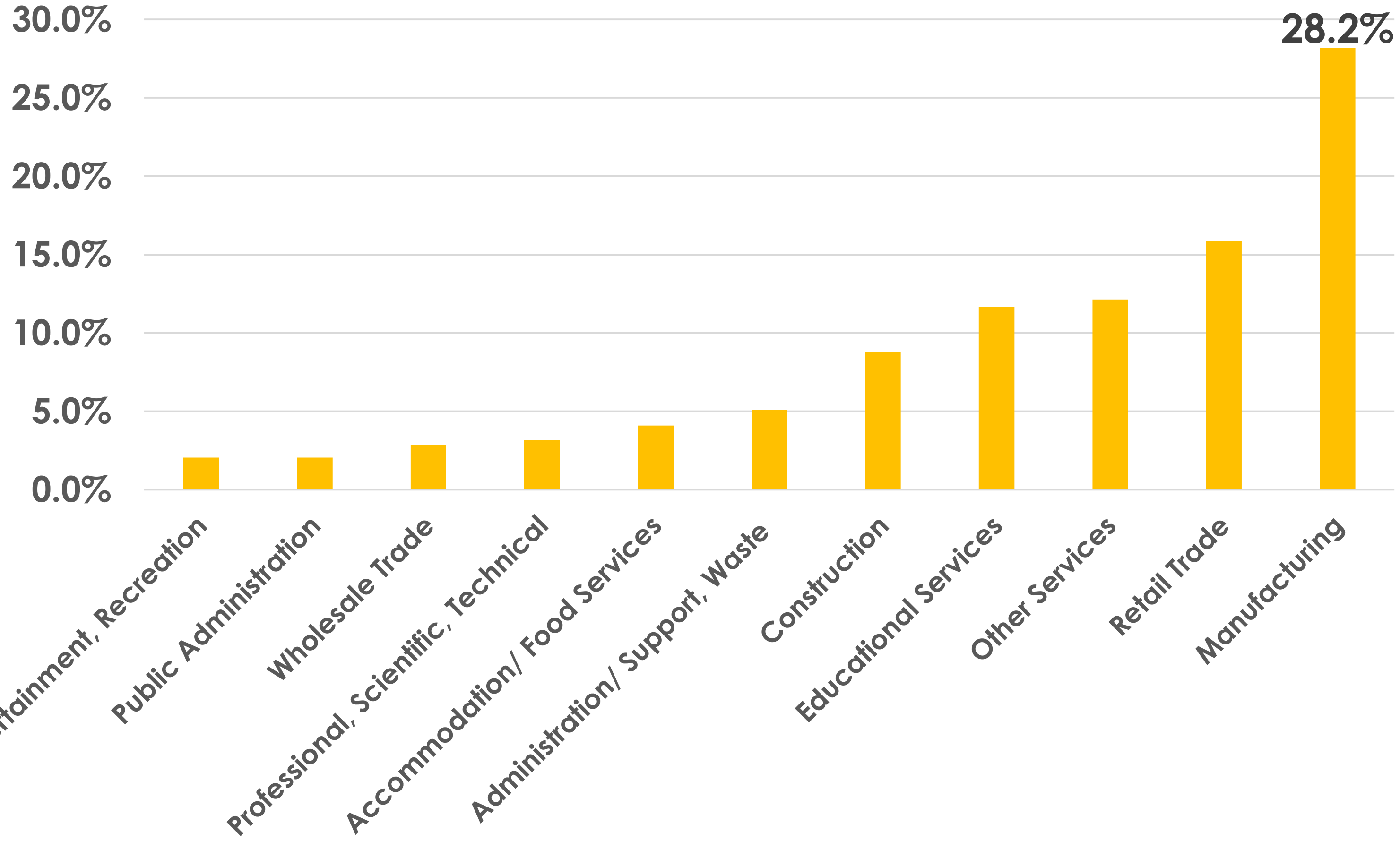
	2010	2017	2022
Total Population	4,614	4,553	4,519
Median Age	41.6	42.6	42.3
Population aged 25-44 (Millennials)	22.4%	22.4%	24.4%
Population aged 64> (Baby Boomers)	13.9%	17.4%	19.9%
Median Household Income		$53,583	$56,276
Vacant Housing Units	7.5%	9.6%	11.5%
White Alone Population	96.6%	95.6%	94.8%
Hispanic Population	1.8%	2.8%	3.5%
Top Tapestry Segments	Rustbelt Traditions (49.4%) Green Acres (32.1%) In Style (10.8%)		

- Overall stabilizing population size – not expected to grow
- Expected 43% spike in Baby Boomer age group from 2010 levels with rising median age
- Diversifying population with moderate household income levels

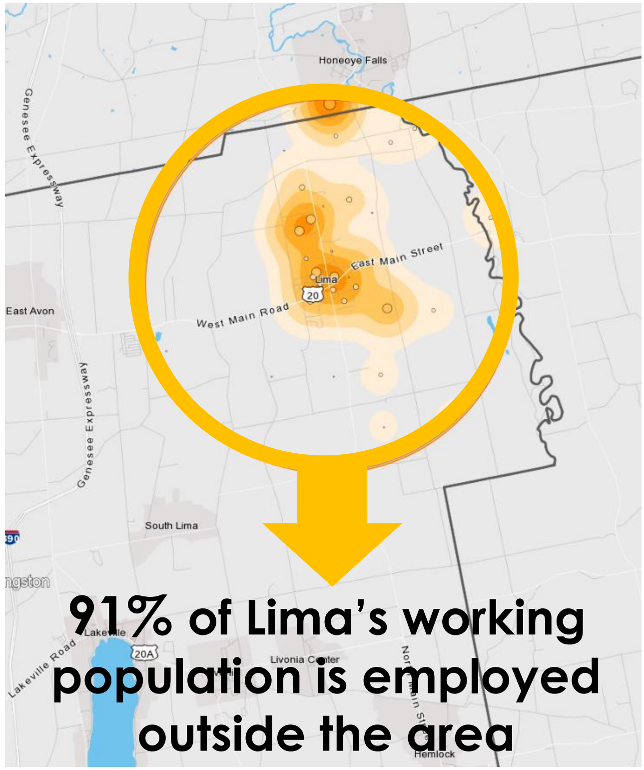
Workforce Profile

Source: LEHD OnTheMap Census Bureau 2014

Total No. of Workers: 1,079

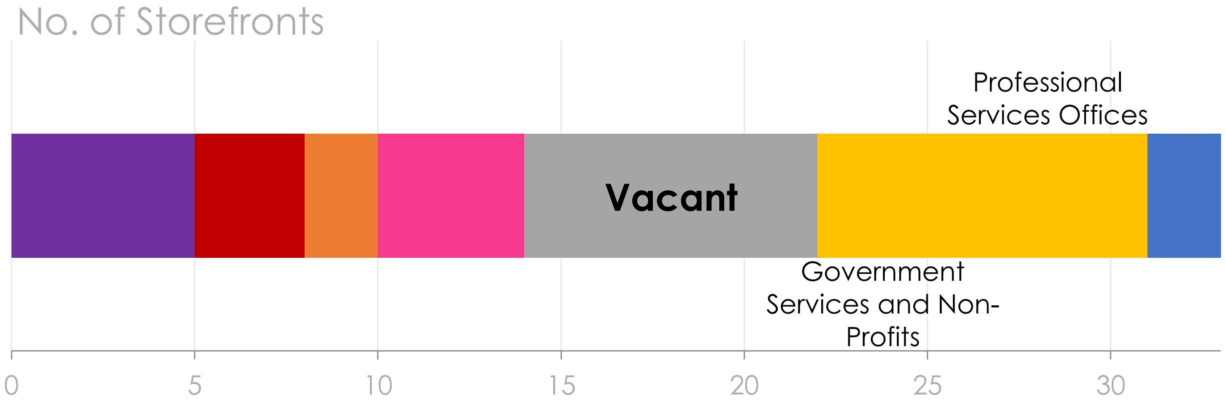


Resident to Worker Ratio



This customer is likely able to do most of his/her shopping in town after 6pm

Passive Storefront Rate	59%
Vacancy Rate	24%
Active Storefront Rate	41%



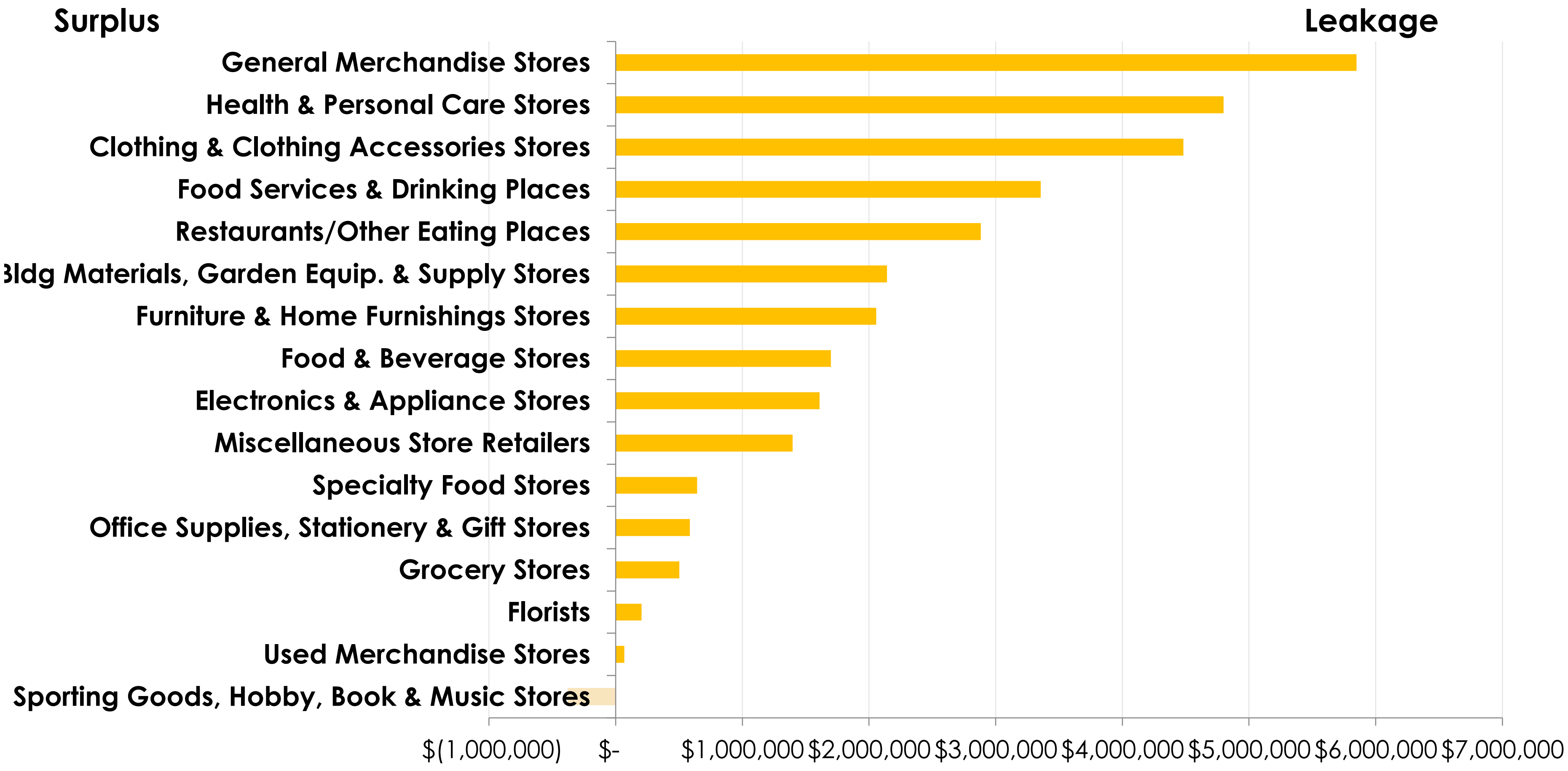
Lima is faced with a challenging retail environment

- Few available storefronts to run retail businesses
- There are some antique and dining places downtown
- However, most storefronts are filled with passive office uses

Retail Gap Analysis

$28,967,115 total retail trade + food and drink leakage

Source: ESRI Business Analyst Online 2017; calculations do not include recent loss of grocery store downtown



Residents spent over $33.2 million on retail and food and drink in 2016.

47% of this total expenditure was spent outside Lima.

Retail Leakage + Potential SF

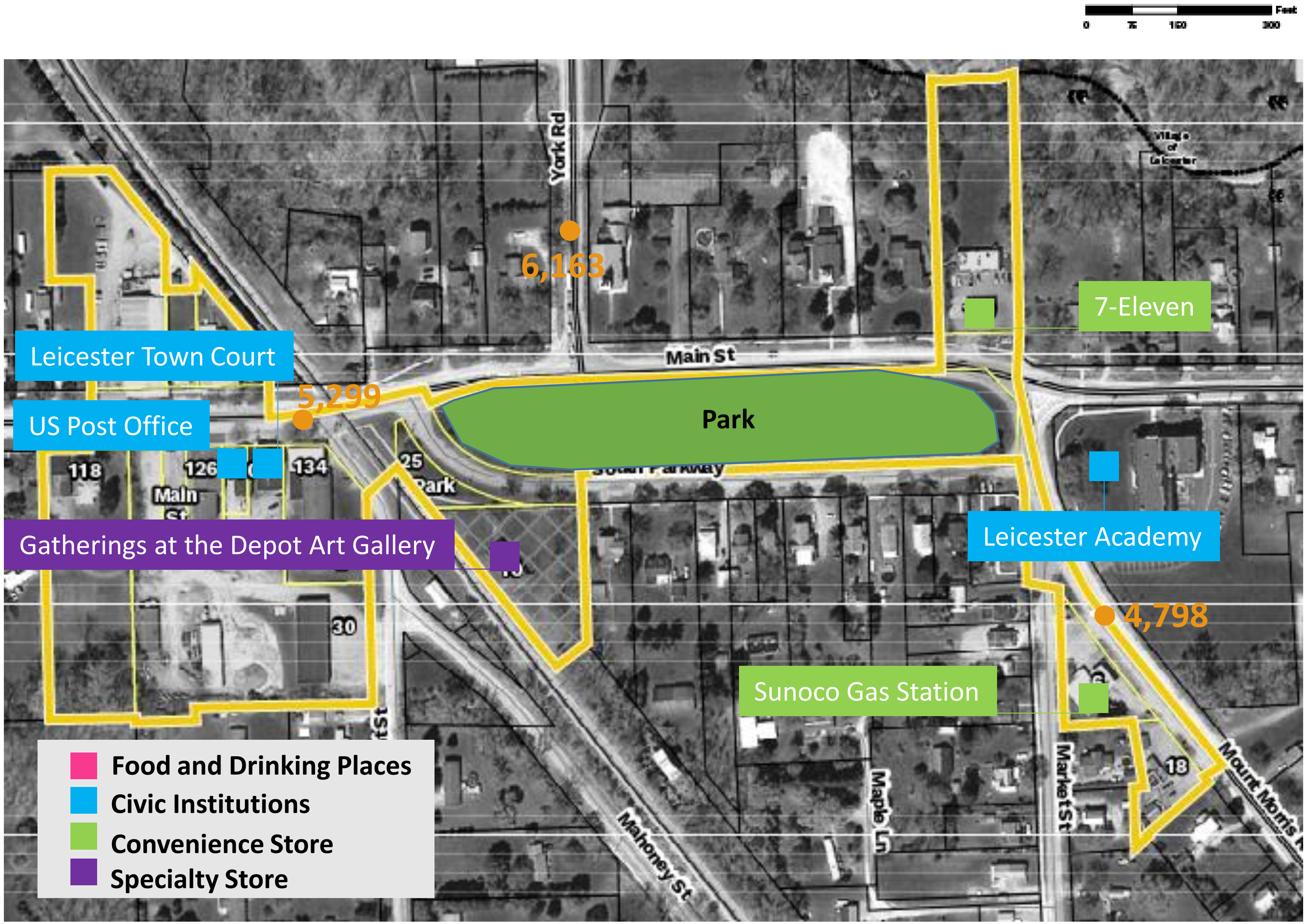
Source: LOA; ESRI Business Analyst Online 2017; ICSC Shopping Mall Sales Productivity (Mid Atlantic region)

Retail Category	Total Leakage	Potential SF	60% Capture Rate (SF)	40% Capture Rate (SF)
Used Merchandise Stores	$ 67,436	326	195	130
Florists	$ 204,341	755	453	302
Grocery Stores	$ 501,887	812	487	325
Office Supplies, Stationery & Gift Stores	$ 585,957	1,896	1,138	759
Specialty Food Stores	$ 643,792	1,069	642	428
Miscellaneous Store Retailers	$1,397,076	2,713	1,628	1,085
Electronics & Appliance Stores	$1,610,134	488	293	195
Food & Beverage Stores	$1,698,434			
Furniture & Home Furnishings Stores	$2,055,641	5,217	3,130	2,087
Bldg Materials, Garden Equip. & Supply Stores	$2,142,581	11,277	6,766	4,511
Restaurants/Other Eating Places	$2,882,703	5,270	3,162	2,108
Food Services & Drinking Places	$3,355,202	5,267	3,160	2,107
Clothing & Clothing Accessories Stores	$4,482,023	12,590	7,554	5,036
Health & Personal Care Stores	$4,799,017	5,529	3,317	2,212
General Merchandise Stores	$5,849,210	10,693	6,416	4,277
	TOTAL SF:	63,902	38,341	25,561

Based on resident spending alone, Lima has very limited potential to grow its retail offerings between 25,500-38,000 SF.

Building materials and garden equipment and supplies, general merchandise, and clothing and accessories are categories with the greatest retail opportunity.

ANCHORS + RETAIL MIX



- No distinct retail corridor with few offerings
- Anchored mainly by the park and civic institutions
- Low traffic counts

LEICESTER

Source: ESRI Business Analyst Online 2017

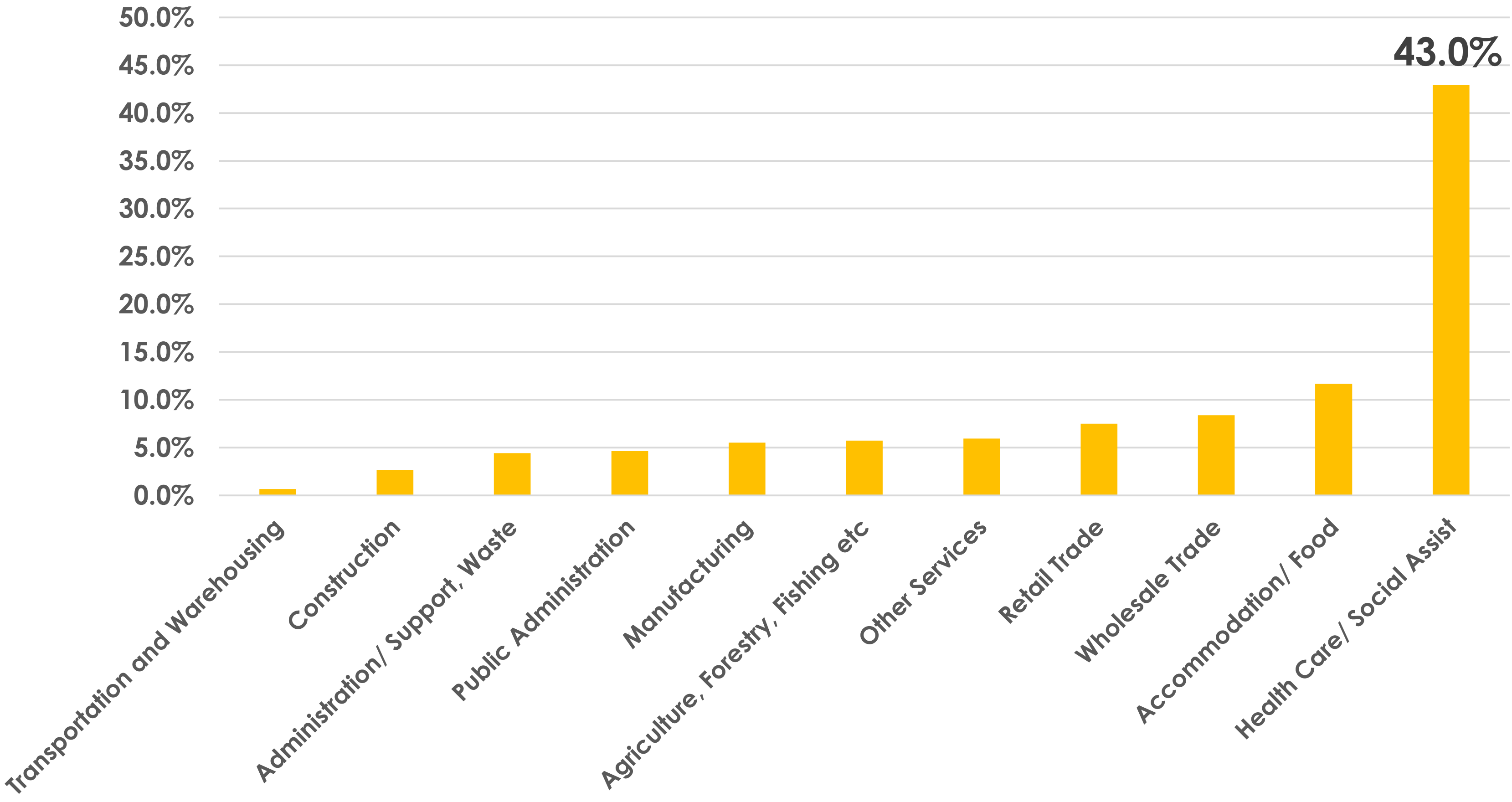
	2010	2017	2022
Total Population	2,631	2,668	2,667
Median Age	44.2	46.1	46.6
Population aged 25-44 (Millennials)	22.7%	23.7%	24.5%
Population aged 64> (Baby Boomers)	18.4%	21.7%	24.6%
Median Household Income		$55,009	$57,956
Owner Occupied Housing Units	72.1%	70.1%	68.7%
Renter Occupied Housing Units	20.0%	20.8%	20.7%
White Alone Population	96%	94.7%	93.7%
Hispanic Population	3.7%	5.5%	7.0%
Top Tapestry Segments	Salt of the Earth (51.1%) Rustbelt Traditions (35.9%) Small Town Simplicity (7.7%)		

- Overall increase in population
- Growth in Millennial and Baby Boomer age groups - about 50% of the total population
- Diversifying population – Hispanic population growing to 7.0% of the total population by 2022

Workforce Profile

Source: LEHD OnTheMap Census Bureau 2014

Total No. of Workers: 454



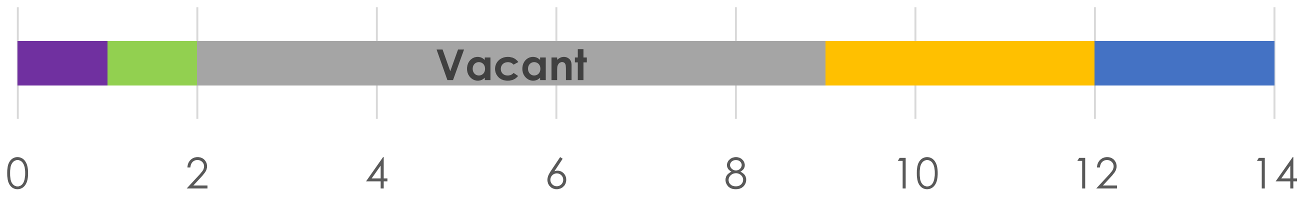
Resident to Worker Ratio

97% of Leicester's working population is employed outside the area

This customer is likely able to do most of his/her shopping in town after 6pm

Passive Storefront Rate	86%
Vacancy Rate	50%
Active Storefront Rate	14%

No. of Storefronts



Leicester is faced with an inactive business environment

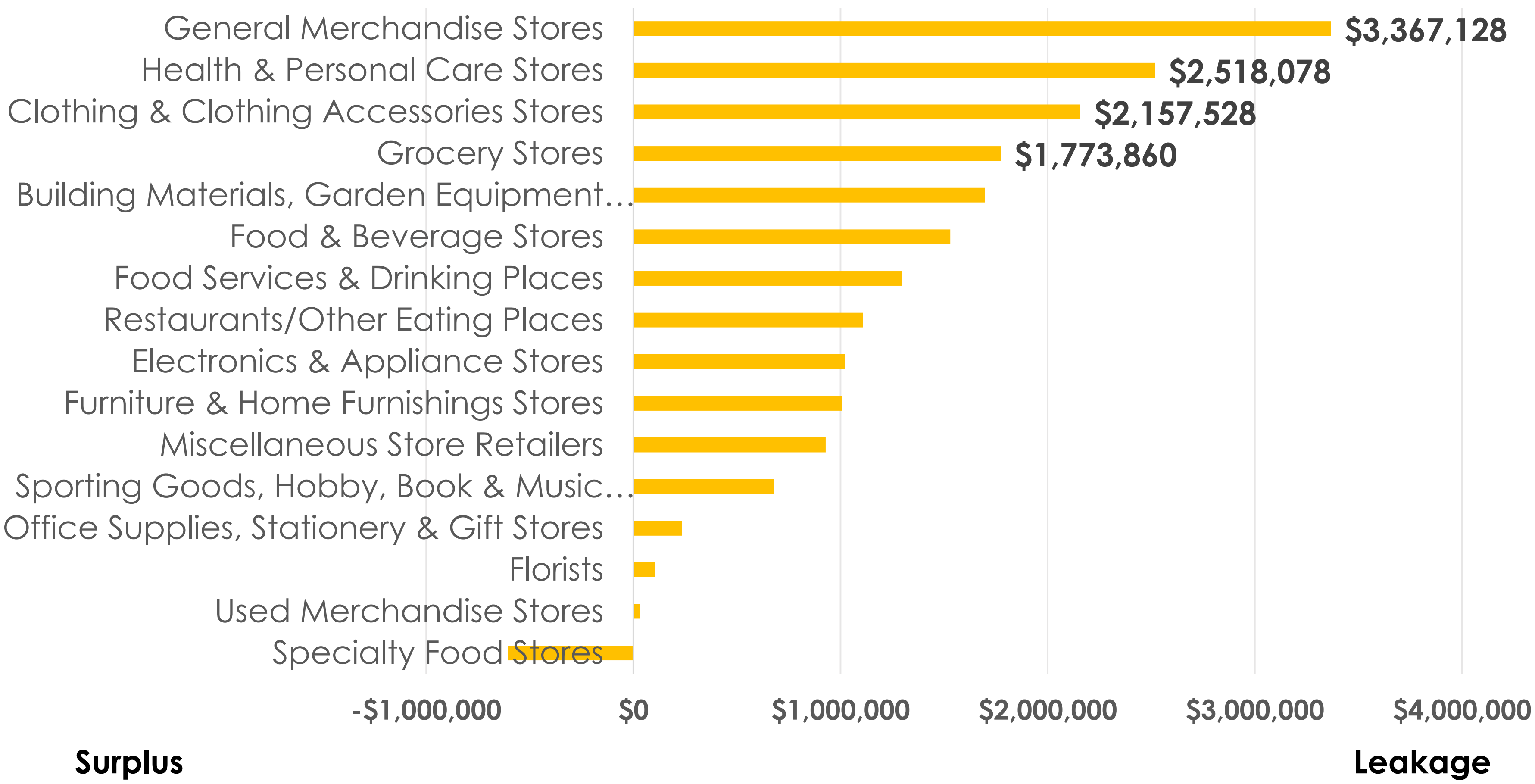
- Few available storefronts to run retail businesses
- High storefront vacancy rate
- Storefronts are filled with passive office uses

LEICESTER

Retail Gap Analysis

$23,740,682 **total retail trade + food and drink leakage**

Source: ESRI Business Analyst Online 2017



Residents spent over $31.9 million on retail and food and drink in 2016.

74% of this total expenditure was spent outside Leicester.

Retail Leakage + Potential SF

Source: LOA; ESRI Business Analyst Online 2017; ICSC Shopping Mall Sales Productivity (Mid Atlantic region)

Retail Category	Total Leakage	Potential SF	60% Capture Rate (SF)	40% Capture Rate (SF)
Used Merchandise Stores	$33,628	162	97	65
Florists	$103,004	380	228	152
Office Supplies, Stationery & Gift Stores	$233,927	757	454	303
Sporting Goods, Hobby, Book & Music Stores	$680,155	2,970	1,782	1,188
Miscellaneous Store Retailers	$928,304	1,803	1,082	721
Furniture & Home Furnishings Stores	$1,009,366	2,562	1,537	1,025
Electronics & Appliance Stores	$1,019,606	309	186	124
Restaurants/Other Eating Places	$1,108,423	2,026	1,216	811
Food Services & Drinking Places	$1,297,379	2,037	1,222	815
Building Materials, Garden Equipment and Supply Stores	$1,696,969	8,931	5,359	3,573
Grocery Stores	$1,773,860	2,869	1,721	1,148
Clothing & Clothing Accessories Stores	$2,157,528	6,060	3,636	2,424
Health & Personal Care Stores	$2,518,078	2,901	1,741	1,160
General Merchandise Stores	$3,367,128	6,156	3,693	2,462
	TOTAL SF:	**39,924**	**23,954**	**15,970**

Based on resident spending alone, Leicester has very limited potential to grow its retail offerings between 16,000-24,000 SF.

In particular, building materials and garden equipment and supplies and clothing stores are categories with the greatest retail opportunity.