Retail Market Analysis
City of Burlington
September 2015

Racine County Economic Development Corporation

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Executive Summary

In September 2015, City of Burlington ("City") engaged Racine County Economic Development Corporation ("RCEDC") to undertake retail needs market assessment for the City, focusing on two areas Downtown; and the Milwaukee Avenue Corridor. The data gathered is meant to assist the City in identifying existing gaps in retailing and guide commercial business development efforts (i.e. supporting business retention, expansion, and recruitment efforts).

The data presented in this report can be used to assess the existing and likely future consumer needs in the prevailing trade area. For the purposes of this report, the trade area is shown by drive time increments of 0-5 minutes, and 5-15 minutes. The data revealed several trends which the City may consider when planning its development. Below are some highlights of trends in the trade and focus areas:

- The trade area population base in the City is projected to grow 0.12% annually from 2015 to 2020. The primary demographic groups represented in the area holds blue collar jobs, have moderate incomes and represent a mix of young families and; ageing and retiring population. The groups are denoted as "Front Porches, Green Acres and Salt of the Earth" as defined by ESRI Tapestry Segmentation Profile and explained in Exhibit 11(a) - Appendix. As such these groups tend to spend less on goods and more on services and experiences. These groups are the major consumers in the trade area and their needs should be considered when identifying targeted stores and services in the area.

- The data revealed a likely a need for convenience oriented retail and restaurants to serve the daily needs of residents and surroundings. The data also shows a broader focus to attract and serve consumers from a larger market area could be considered. To serve this population, the strategy would include a mix of comparison and convenience retail in the area. Additional market segments might emerge as Burlington community grows and changes.

- The trade area indicates $46 million surplus within 0-5 minute drive time in the retail trade and food and drink industries as explained in Exhibit 19 - Appendix. This indicates customers are drawn in from outside the trade areas. A closer look at the data indicates retail leakage spread across many subsectors (i.e. local consumers are spending outside the community for products) that includes specialty food stores, building materials and supply dealers, special food services restaurant, office supplies, stationary, and gift shops, books periodicals and music stores, clothing stores, and shoe stores.

  Within 5-15 minute drive time trade area, there is a $109 million leakage in the retail trade and food and drink industries as explained in Exhibit 19 - Appendix. This indicates most of the residents in the trade area are spending on retail activities and services both within the trade area and areas outside the trade area boundaries. Accordingly, the area may be able to support new (or existing) businesses within identified sub sectors. These industry sub sectors are– clothing and clothing accessories stores, general merchandise stores, food services and drinking places, and electronics and appliance stores.

- In Downtown Burlington, the expansion of existing and recruitment of businesses in in-demand and compatible categories could strengthen downtown's appeal and may attract a higher volume of target consumers. Examples of businesses that together would have a stronger draw when clustered together in downtown and exhibit a retail gap include restaurants/cafés, gift shops, office and office supplies, stationary, and gift shops, books periodicals and music store, apparel stores and home furnishing/decorating stores.

  Along Milwaukee Avenue Corridor, the agglomeration of big box/ franchise/ large retailers can be leveraged to attract retailers of the same type or different types with synergistic potential to draw customers from beyond the market area. Potential retailers based on the retail gap analysis are clothing and clothing accessories stores, food services and drinking places, and electronics and appliance stores.

The trends in the retail needs assessment provide baseline data of the trade area and focus areas. Additional assessment through discussion with the community and potential retail and commercial tenants will be needed to shape the final retail strategy that guides commercial business development.

Introduction

The City of Burlington is a small relatively mature community that prides itself on its local identity and regional identification as the chocolate city. From the Midwest headquarters of Nestle Chocolate to Echo Lake Food, to the many "mom and pop" retail and service businesses that occupy Burlington's historic downtown, there is a wide diversity of commercial operations, outlying shopping centers and big box stores. Even with the diversity, the City has gone to considerable lengths to preserve a unique historic charm and small town character. At the same time, however, the demands for additional services by the residents and the need for additional revenue by the City suggest that opportunities for additional retail development be explored and pursued. To this end, the City retained Racine County Economic Development Corporation in 2015 to undertake a strategic assessment of retail opportunities in the City and to provide specific insights on two focus areas:

1. Downtown; and
2. Milwaukee Avenue Corridor

The objectives of the efforts were to:

- Identify and reduce existing gaps in retail offerings;
- Guide commercial business development efforts (i.e. supporting business retention, expansion, and recruitment efforts); and
- Confirm the City's identity while at the same time increasing retail synergy

While this report does not attempt to provide business-level marketing advice, it can be used to help business operators understand market characteristics in their efforts to reach new customers and provide guidance to the City in setting policy and in creation of an informed retail strategy to attract additional retailers and enhance the existing business base.

The method used to achieve these objectives was a combination of data analysis sourced through Environmental Systems Research Institute (ESRI), a community survey, business owner's one-on-one meetings, and business mix inventory analysis, and community scan by RCEDC staff. A consumer profile and a detailed analysis of current retailing patterns in Burlington with the special attention on retail mix of the downtown and the Milwaukee Avenue corridor offer a baseline perspective on future retail opportunities.

The study team also undertook a series of field trips to identify potentials in the context of having established existing land use and retailing patterns. The recommendations formulated based on these community observations were then integrated with the prior statistical analysis to provide the overall recommendations.

Note that the focus of this report and the recommendations provided deal with long term strategy. The study team believes that a sustained commitment to implementing the retail strategy and actions will yield significant positive results; though these efforts should not be expected to produce immediate results.

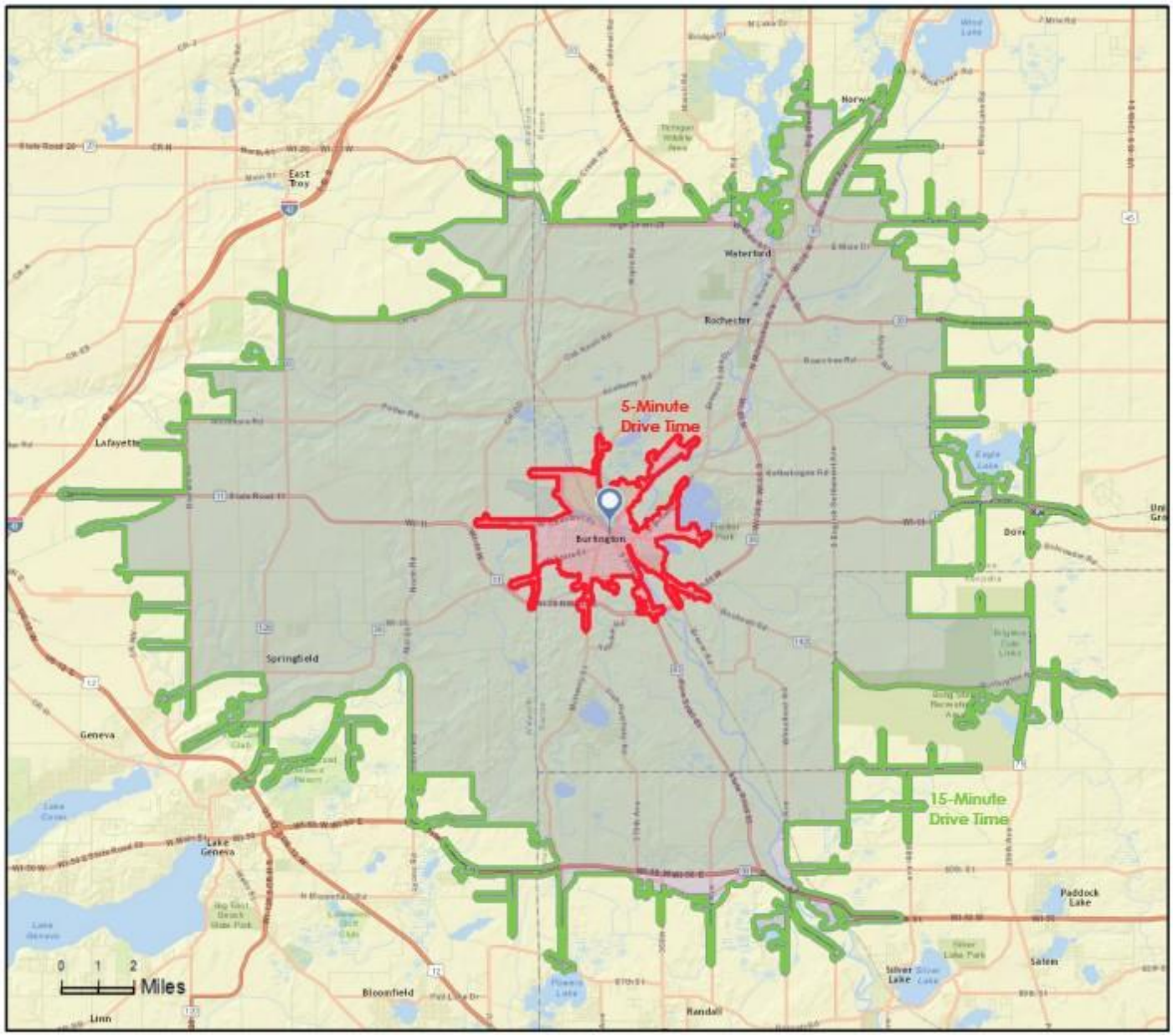
Authorship and Acknowledgments

The study was prepared under the joint administrative supervision of Jenny Trick, Laura Million & Tina Chitwood of Racine County Economic Development Corporation. The study was conducted and authored by Rachana Kothari of Racine County Economic Development Corporation. The study team wishes to acknowledge the extended cooperation provided by the City of Burlington.

Trade Area Delineation

The trade area for the City of Burlington is the geographic region from which the majority of the retail and service business customers originate. While short term visitors may frequent the proposed retail location, the local residents and employees still provide the majority of spending potential. These patrons may be regular clientele, employees working in the area or they could be unrealized future customers.

Exhibit 1: Trade Area Boundary



Defining a trade area requires analyzing its unique market characteristics. A trade area often extends beyond the municipal boundaries of a community. A specific retail location may have a number of different trade areas depending on the types of retailers. The variability can be attributed to the products offered, business and, or different customer segments. Different business types will have different trade areas. That is, people will travel from greater distances to purchase certain goods and services than others. While each individual store may have its own unique trade area, these areas can often be generalized into two different types: convenience shopping trade areas and comparison shopping trade areas.

Data for the analysis of the City of Burlington considered both convenience oriented and comparison shopping trade areas. Local convenience trade areas are based on the ease of access to convenience products. That is, people seek to obtain these products (gasoline, groceries, coffee shops, dry cleaners, salons, local branches of banks, florists, baked goods etc.) based on close proximity by travel distance or travel time. Conversely, comparison shopping trade areas are based on price, selection, quality and style. People are more likely to compare these types of goods (electronics, appliances, furniture, clothing, etc.) and be willing to travel longer distances for their purchase. Subsequently, the trade area will shrink or grow depending on the products sold. Clearly, there are exceptions to this sort of shopping behavior, but for modeling purposes we believe this to be a reasonable core assumption.

In addition to different types of shopping goods, three customers segments should be considered when determining the retail market strategy—local residents, day-time employees, and tourists.

- Local residents live within the trade area. As they reside year-round, local residents provide the majority of spending potential for most retail locations.
- Daytime employees may live in the trade area, but may also commute from outside the trade area. While these employees are in a specific location for their employment, they represent the potential buying power to stay and make purchases.
- Furthermore, depending on the community, tourists can provide a large amount of spending potential. Tourists make purchases when they visit the area.

An assumption has been made that the proposed retail development would serve all three market segments. However, the data presented only represents trends for residents located within the trade area due to limited data availability of spending patterns of daytime population and tourists visiting the area.

Convenience shopping trade areas based on travel distance assume that customers will not travel longer than a pre-determined distance to visit a store. On the other hand comparable shopping trade areas are the ones where customers are willing to travel from longer distances. Using travel distance to define trade areas is more useful for some product and store categories than others. The focus of this analysis will be based on travel time distances to identify retail opportunities at both realms - convenience as well as comparison retailers.

Competition located in neighboring communities (Mukwonago, Elkhorn, Lake Geneva, and Bristol) that serve the trade area should also be considered. Additionally, commuting patterns of Burlington residents will impact the desirability of which retailers should locate in the community.

Numerous methods of calculating trade area are available. However, this analysis is an attempt to capture both convenience and comparison oriented retail options for the City and uses a travel distance of 15-minutes to approximate the trade area. Additionally, to develop a more specific retail strategy for the City, two focus areas: Downtown and Commercial Corridor along Milwaukee Avenue are chosen for further analysis.

Downtown

The trade area boundary for Burlington downtown overlaps the historic downtown overlay district and runs from Commerce Street to Pine Street from West to East and on Southwest of Echo Lake along Milwaukee Avenue. The characterization of retail sites in the downtown is generally small with a historic charm and identity (Exhibit 2a, 2b, 2c). Downtown Burlington includes a mix of retail and service businesses that include shoe boutiques/men's wear; antiques/art; gifts/ chocolate/ florists/ jewelry; restaurants/café/ice cream, and financial services-insurance.

Exhibit 2: Downtown Burlington

Exhibit 2a

Exhibit 2b

Exhibit 2c

Milwaukee Avenue Corridor

The Milwaukee Avenue corridor runs on Northeast of Echo Lake and Northwest of Burlington bypass, Highway 83.

Exhibit 3: Milwaukee Avenue Corridor

It is composed of unanchored outlying shopping centers and big box retailers like Walmart, Kohl's, Menards, etc. (Exhibit 3a, 3b, 3c, 3d) that attracts the customers from neighboring communities.

Exhibit 3b

Exhibit 3c

Exhibit 3d

Resident Market Profile

The resident market profile provides key economic, demographic and lifestyle data for the City of Burlington's trade market area. Understanding trade area residents market profile and trends, helps existing businesses and prospective investors assess the market demand for retail goods and services. Typically, consumer demand is fueled by individual or household purchases and anticipated household or population growth may indicate future opportunities for a retailer.

Population and Households

Population and household data are the basis for quantifying the current market size and growth trends, both of which are vital in determining consumer demand. Population is defined as all persons living in a geographic area. Households consist of one or more persons who live together in the same housing unit, regardless of their relationship to each other (including all occupied housing units). In addition to current figures, historic or anticipated household or population growth may indicate future business opportunities.

Exhibit 4: Population

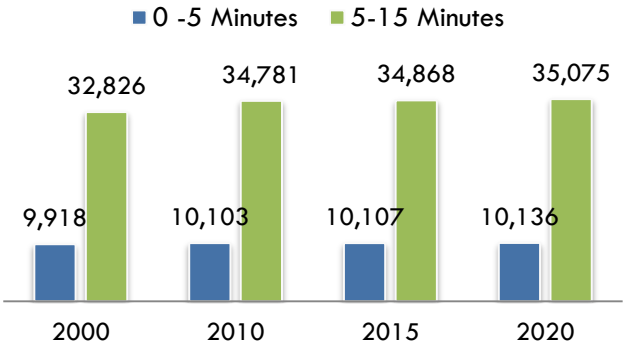
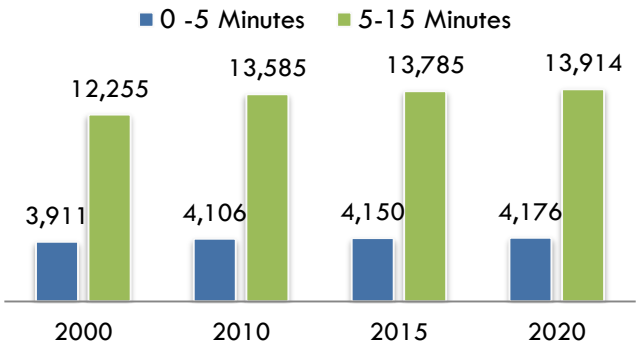


Exhibit 5: Households



Findings: In the trade area, the current year population is 34,868. In 2010, the Census count in the area was 34,781. The rate of change since 2010 was 0.05% annually. The five-year projection for the population in the area is 35,075 representing a change of 0.12% annually from 2015 to 2020. Currently, the population is 49.7% male and 50.3% female.

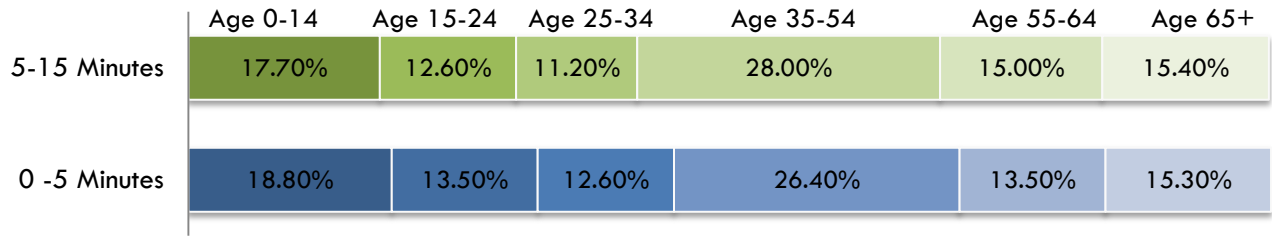
The household count in the area has changed from 13,585 in 2010 to 13,785 in the current year, a change of 0.28% annually. The five year projection of households is 13,914, a change of 0.19% annually from the current year total. Average household size is currently 2.51, compared to 2.54 in the year 2010. The number of families in the current year is 9,639 in the specified area.

Age Cohort

Examination of age provides perspective on current and changing demand for products and services in the area as expenditure patterns change with age. For example, drug stores and assisted care services flourish in areas with a large elderly population. Toy stores, day care centers, and stores with baby care

items are often successful in areas with many children and infants. Clothing stores and fast food establishments thrive in retail areas that contain a large concentration of adolescents. Furthermore, specialized entertainment and recreation options can target certain age segments.

Exhibit 6: Age Cohort



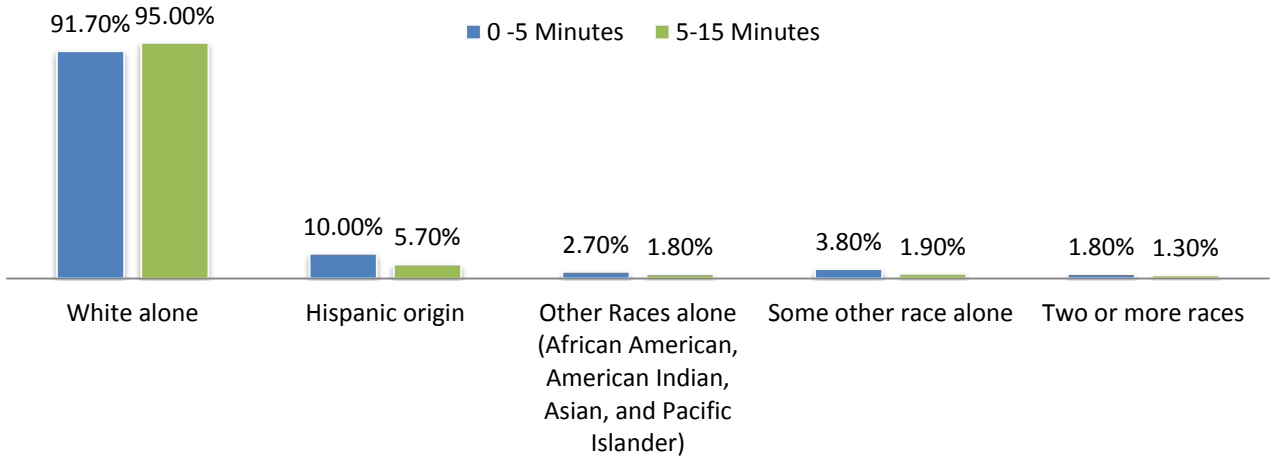
Findings: The data for age cohort indicates that 28% of the population is in the peak employment age of 35-54 and nearly 15% falls under age range of 55-64. The younger population ranging from 15-24 composed of 12.6%. The projections for year 2020 indicate there will be a decrease in the younger population and substantial increase in the retirees and older population. The median age in the trade area is 39.1, compared to U.S. median age of 37.9.

Race/Ethnicity

Spending patterns often differ with ethnicity. Understanding the ethnic distribution of a population is the first step to meeting the needs of different ethnic groups.

Findings: The percent of residents living in the trade area who identify as White Alone is 91.7 % while the national average is 77.5%. The population of the trade area is less diverse than the national average. The largest minority population group is Hispanic origin. Persons of Hispanic origin represent 5.7% of the population in the trade area compared to 17.6% of the U.S. population.

Exhibit 7: Race/ Ethnicity

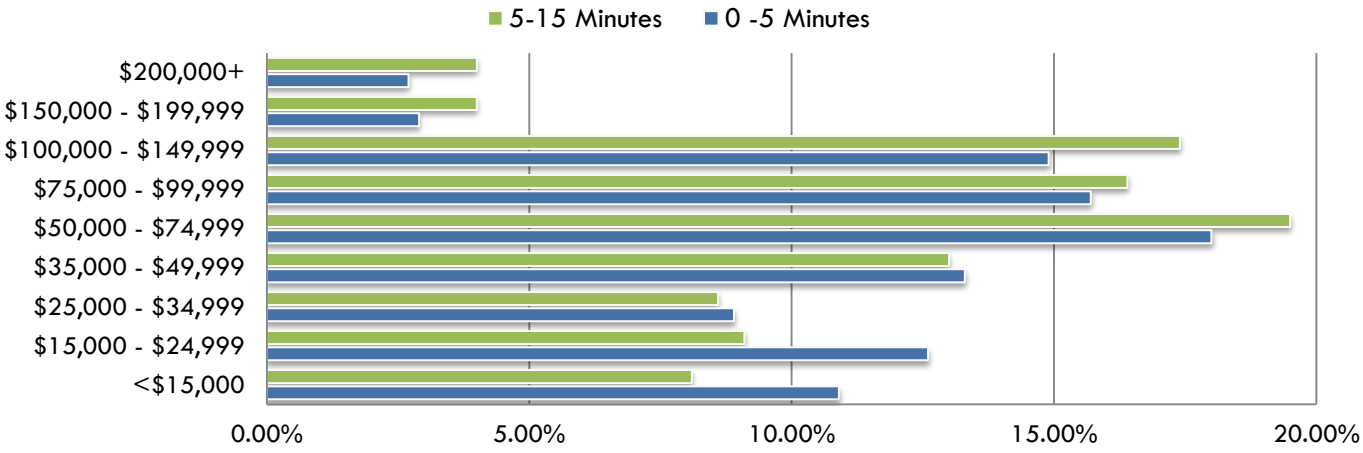


Persons of Hispanic Origin may be of any race. *The Diversity Index, which measures the probability that two people from the same area will be from different race/ethnic groups, is 19.3 in the trade area, compared to 63.0 for the U.S. as a whole.*

Income

As households income positively correlates with retail expenditures in many product categories, household income is a good indicator of spending power. Retailers may consider the median or average household income in a trade area or seek a minimum number of households within a certain income range when determining a site location. Another common practice is to analyze the distribution of household incomes in the trade area. Discount stores avoid extreme high or low-income areas. Some specialty fashion stores target incomes above $75,000. A few store categories including auto parts are more commonly found in areas with lower household incomes. It should be noted that using income as the sole measure of a markets' taste preference can be deceptive.

Exhibit 8: Income



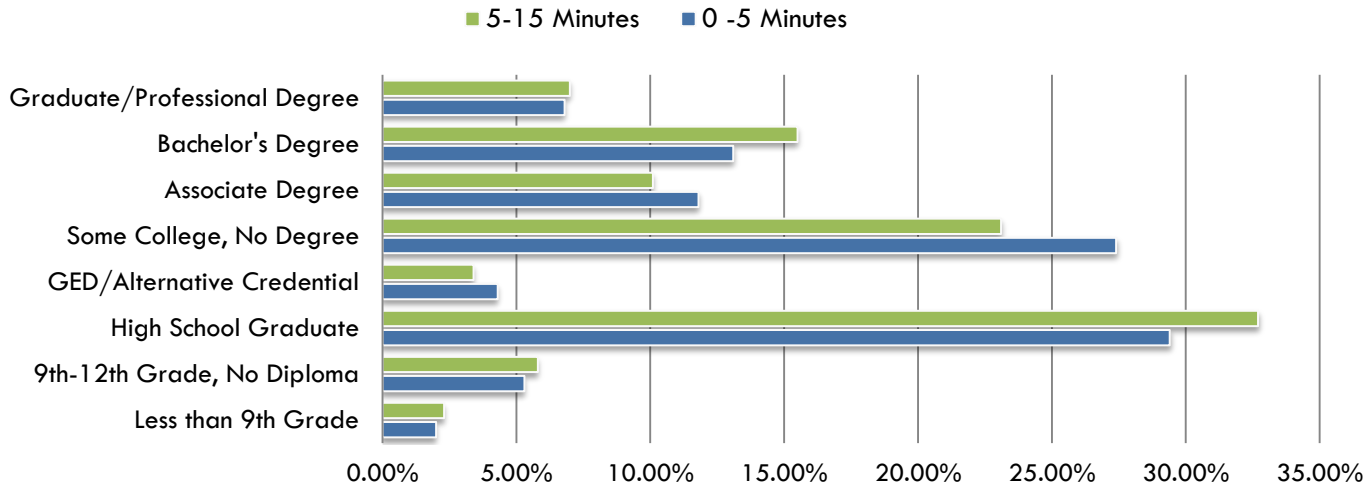
Findings: Current median household income is $61,938 in the area, compared to $53,217 for all U.S. households. Median household income is projected to be $75,325 in five years, compared to $60,683 for all U.S. households. Current per capita income is $30,667 in the area, compared to the U.S. per capita income of $28,597. The per capita income is projected to be $35,562 in five years, compared to $32,501 for all U.S. households

Education

Education is another way to determine the socio-economic status of an area. As income often increases with advancing educational attainment, many retailers focus on income level rather than education. One exception is bookstores, which are often cited by developers based on the number of college-educated individuals in the trade area. Similarly, computer and software stores are often located in areas with high levels of education. It should be noted that education data is only analyzed for the population age 25 or older.

Findings: In the trade area 32.7 percent of the population is at least high school graduate and nearly 56 percent or more people have some college degree or higher.

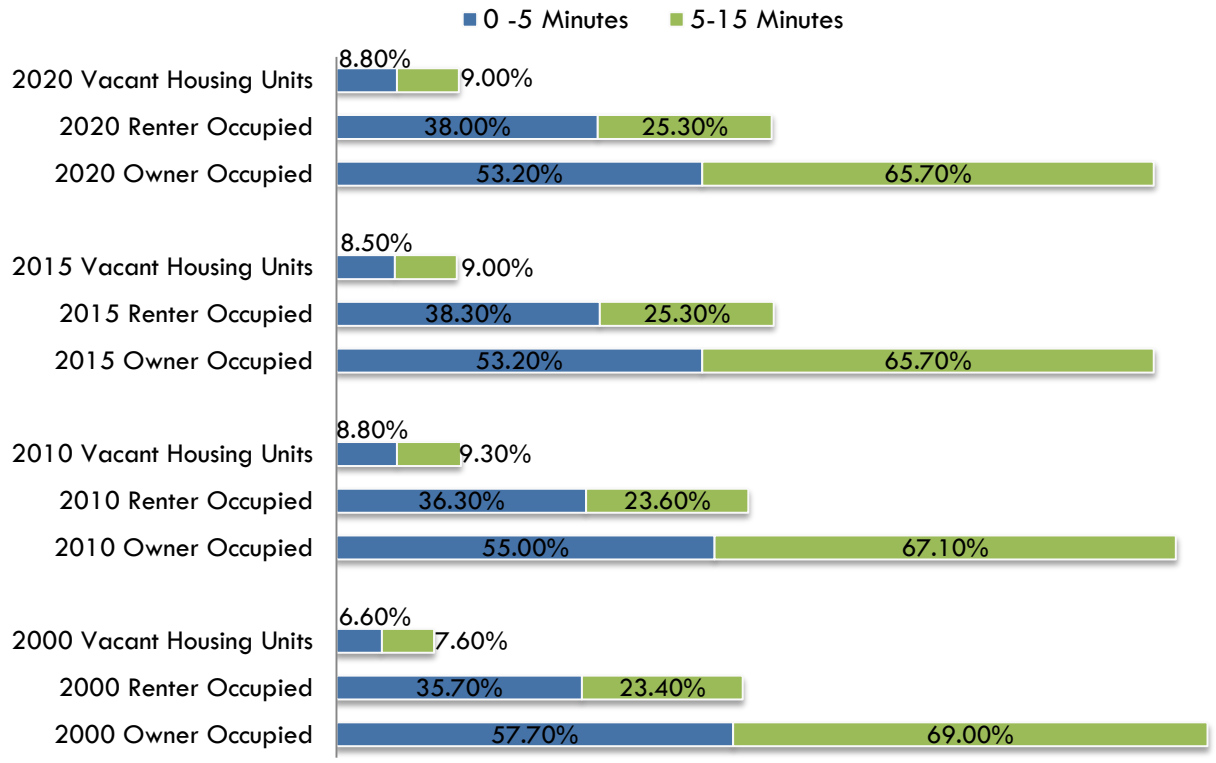
Exhibit 9: Educational Attainment



Housing Tenure and Occupancy Rate

Housing tenure refers to the number of owner occupied and renter occupied housing units in the area. The occupancy rate relates the number of housing units that are occupied and estimates the future housing units. These statistics are used to analyze the potential for products and services consumed based on housing tenure. For instance, homeownership directly correlates with expenditures for home furnishings and home equipment. Home improvement, furniture, appliances, hardware, paint/wallpaper, floor covering, garden centers and other home products often prosper in active housing markets.

Exhibit 10: Housing Tenure



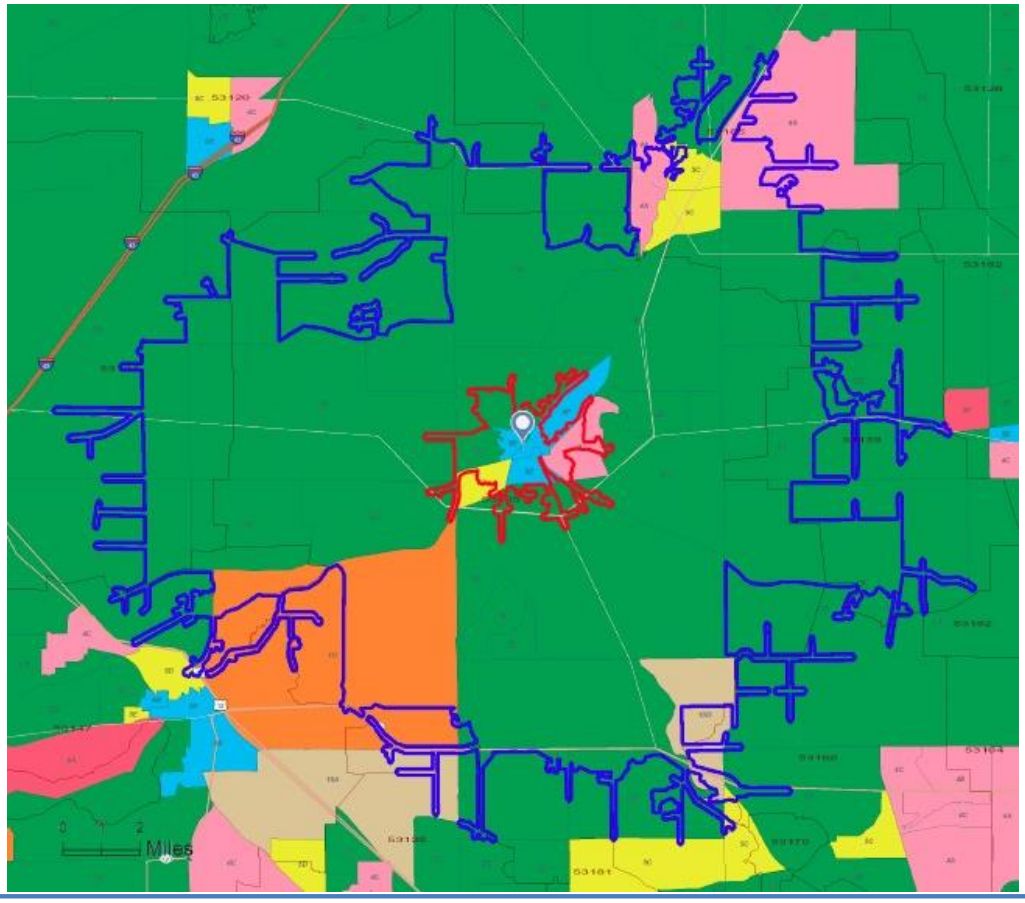
Findings: Currently, 65.7% of the 15,147 housing units in the area are owner occupied; 25.3%, renter occupied; and 9.0% are vacant. Currently, in the U.S., 55.7% of the housing units in the area are owner occupied; 32.8% are renter occupied; and 11.6% are vacant. In 2010, there were 14,972 housing units in the area - 67.1% owner occupied, 23.6% renter occupied, and 9.3% vacant. The annual rate of change in housing units since 2010 is 0.52%.

Median home value in the trade area is $198,794, compared to a median home value of $200,006 for the U.S. In five years, median value is projected to change by 3.99% annually to $241,766.

Lifestyles

An analysis of demographics can provide basic information about consumers in the trade area. However, trade area residents can be examined in more detail by examining lifestyle segmentation information. Lifestyle segmentation systems examine the population's buying habits and preferences. One specific lifestyle segmentation system is Tapestry™, by ESRI Business Information Solutions. Tapestry™ data is available for individual neighborhoods for the entire country and the data was reviewed for this analysis. Consumers are classified into 65 demographic and behaviorally distinct segments. The clusters are based on type of neighborhood (urban, suburban, rural); the residents' socio-economic status (age, income, occupation, type and value of residence); and their buying behaviors and preferences. Tapestry™ data is updated annually using various national and local data sources.

Exhibit 11: Tapestry Segment



The top five lifestyle tapestry segments of the trade area are explained in Exhibit 11(a) - Appendix and presented below along with ESRI's brief descriptions:

0-5 minute drive time	5-15 minute drive time
Front Porches (8E) – 29.5%	Green Acres (6A) – 31.7%
Green Acres (6A) – 22.3%	Salt of the Earth (6B) – 18.0%
Middleburg (4C) – 15.2%	Parks and Rec (5C) – 14.6%
Old and Newcomers (8F) – 13.8%	Front Porches (8E) – 8.9%
Parks and Rec (5C) – 13.2%	Soccer Moms (4A) – 7.9%

Tapestry Segment 8E: Front Porches (29.5% population living within 0-5 min. drive time)
Household Type: Married Couples
Housing: Single Family, Multi-units
Description: Diverse, young families with kids; singles; and single parents populate our neighborhoods. Half of us are renting older town houses or duplexes. Friends and family mean everything to us and somewhat govern what we buy. Blue-collar jobs and low incomes limit our shopping options; we purchase by price, not brand or style. Cooking at home instead of eating out helps to save money. Many of us have taken out loans to help make ends meet. Playing games, checking out dating sites and visiting chat rooms are primary online activities. When we have time, we play sports, play bingo, visit indoor water parks, and play video games. TV includes watching PBS Kids Sprout, Comedy Central, and Nickelodeon. Cell phones are used to redeem mobile coupons or to listen to hip-hop and R&B.

Tapestry Segment 6A: Green Acres (22.3% population living within 0-5 min. drive time & 31.7% population living within 5-15 min. drive time)
Household Type: Married Couples
Housing: Single Family
Description: We're older, self-reliant, married couples who are still working, but edging toward retirement. Most of us have no children living at home. We earn income from wages and salaries, investments, and increasingly, Social Security benefits. Country life is for us, so you'll find us in the rural pockets of urban areas, living in older single-family homes with acreage. Because our homes are older, we handle maintenance and remodeling projects ourselves and own the proper tools to accomplish the tasks. Vegetable gardening is a priority. We're active in the community and are members of fraternal organizations and veterans' clubs. Even though we're pessimistic about the economy, we're not afraid of carrying some debt, such as home and car loans. We spend cautiously, focusing on quality and durability. Technology isn't important; even though we shop and bank online, the Internet is primarily for entertainment.

Tapestry Segment 4C: Middleburg (15.2% population living within 0-5 min. drive time)
Household Type: Married Couples
Housing: Single Family
Description: In the last decade, our neighborhoods changed from country to semirural as the housing boom expanded into the outer suburbs. We're conservative, family-oriented young couples, many with children. Family, faith, and country are the standards we follow. We're thrifty, preferring to buy American and take vacations in the US. Looking toward the future, we're saving but willing to assume some debt now. Staying in touch is important, so our cell phones and mobile devices are always at hand. We drive trucks and SUVs and enjoy the American pastimes of baseball, hunting, and bowling. TV and magazines provide information and entertainment; Christian and country TV channels are favorites.

Tapestry Segment 8F: Old and Newcomers (13.8% population living within 0-5 min. drive time)
Household Type: Singles
Housing: Single Family, Multi-units
Description: Our neighborhoods are in transition: most of us are singles on a budget and renting because we're either beginning our careers or we're retiring. The differences in our ages somewhat dictate our tastes: the younger residents are comfortable with technology, may still be in college, or would support environmental causes. Older residents may take adult education classes or prefer to keep their landline. We focus on convenience and economy. We're just as likely to bank online as in person. Some will go online to play games and visit dating sites; other entertainment includes watching movies at home, listening to country music, and reading newspapers. Food tends to be convenient, frozen meals and fast food.

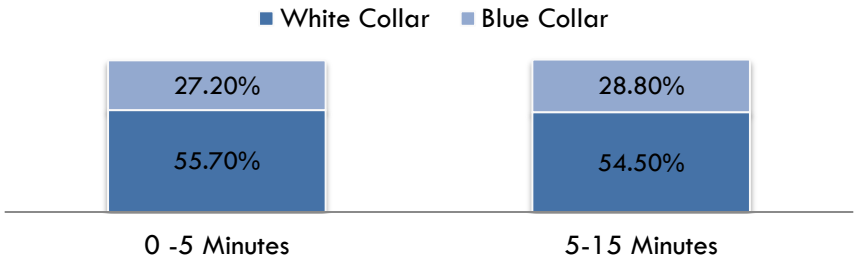
Tapestry Segment 5C: Parks and Rec (13.2% population within 0-5 min. drive time)
Household Type: Married Couples
Housing: Single Family
Description: We achieved the dream of home ownership by living within our means and buying an affordable older home in a well-established neighborhood. We're practical suburbanites who are two-income, married couples approaching retirement age; however, we're still working because we're comfortable in our jobs and homes with no plans to retire soon. Stocking up on staples at warehouse stores and thoroughly researching big-ticket items before purchase confirm our consumer caution. This also extends to our vehicles; price and practicality are primary considerations before selecting a domestic truck or SUV. Exercising is part of our routine; we take advantage of local parks, gyms, and home equipment. Movies, dinner out, and gambling online or at casinos fill leisure hours.

Tapestry Segment 6B: Salt of the Earth (18.0% population within 5-15 min. drive time)
Household Type: Married Couples
Housing: Single Family
Description: We're solid, settled, and traditional married couples concentrated in the Midwest. Many of our kids have grown up and moved away, but we're staying put in our traditional, rural lifestyles. Construction, manufacturing, and related service industries provide steady employment. Long commutes, sometimes across county lines, mean owning at least two vehicles. Tending our vegetable gardens and cooking the harvest are second only to enjoying time with family. Remodeling and home improvement projects don't intimidate us, but technology is another matter. We go online only when necessary. Brand loyal and cost conscious, we try to buy American when we can and conduct our business in person. Leisure time is spent hunting, fishing, camping, and boating. We own the equipment and vehicles to support those pastimes.

Tapestry Segment 4A: Soccer Moms (14.6% population living within 5-15 min. drive time)
Household Type: Married Couples
Housing: Single Family
Description: The relative peace of our affluent, family-oriented neighborhoods in the outer suburbs provides welcome relief from our hectic jobs, long commutes, and busy lives with growing children. Any minute we can save is critical, so we're fans of conveniences such as banking and shopping online and housekeeping services. First and second mortgages and car loans are part of life, but we're well insured and building investments such as funds, bonds, and stocks. A variety of mobile devices such as iPods and tablets keeps us connected. We're involved in sports and outdoor activities such as jogging, biking, golf, boating, and trips to a theme park.

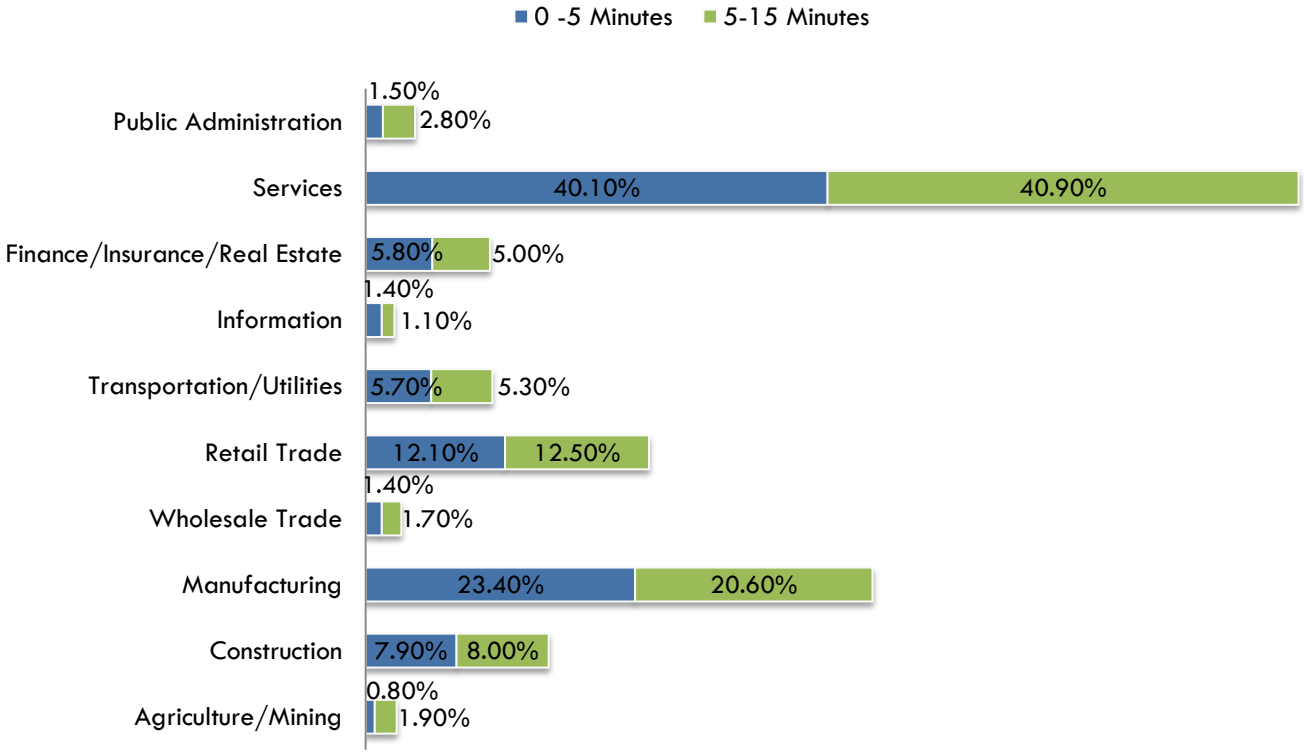
Employment and Labor Force Characteristics

Many retailers use the concentration of white or blue-collar workers to gauge a market's taste preferences. Specialty apparel stores and personal services (such as dry-cleaning) thrive in middle to upper income areas and above average white-collar employment. Second hand clothing stores and used car dealerships are successful in areas with a higher concentration of blue-collar workers. Office supply stores, large music, and video stores are especially sensitive to the occupational profile. These retailers target growth areas with a majority of white-collar workers.



Following graphs present the breakdown of workers by industry and occupation for the trade area.

Exhibit 12: Employment by Industry

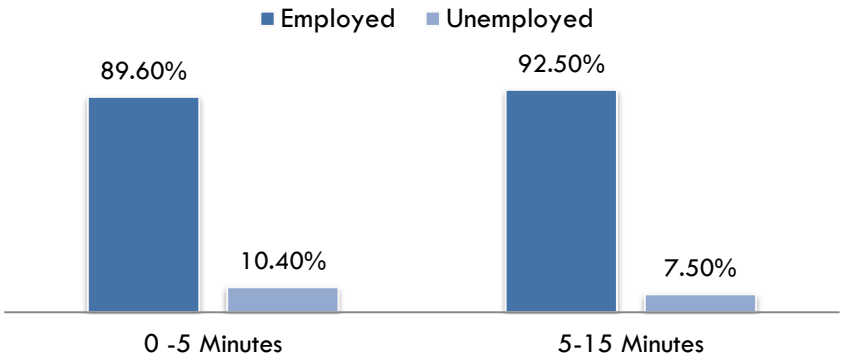


Findings: Currently, 54.5% of the employed population in the trade area is White Collar that serves in management, business, financial, professional, sales, and administrative support services whereas about 28.8% blue collar employed population serves in construction, transportation, production, installation/ maintenance and farming, forestry, fishing industries. Top three industries with majority of employment include services, manufacturing and retail trade.

Labor Force Composition

The labor force considers all people age 16 and over that are employed, unemployed or on active duty in the U.S. Armed Forces. People age 16 and over who are not members of the labor force consist mainly of students, individuals taking care of home or family, retirees, seasonal workers and institutionalized people.

Exhibit 13: Labor force Composition



***Findings*:** In the current trade area of 0-5 minutes the labor force participation rate is lower and unemployment rate higher than that of 5-15 minute's drive time trade area. It should be noted that labor force participation and unemployment are monitored on an ongoing basis with values changing monthly. The rates shown may not represent current conditions. Current unemployment data is available by county from the Wisconsin Department of Workforce Development.

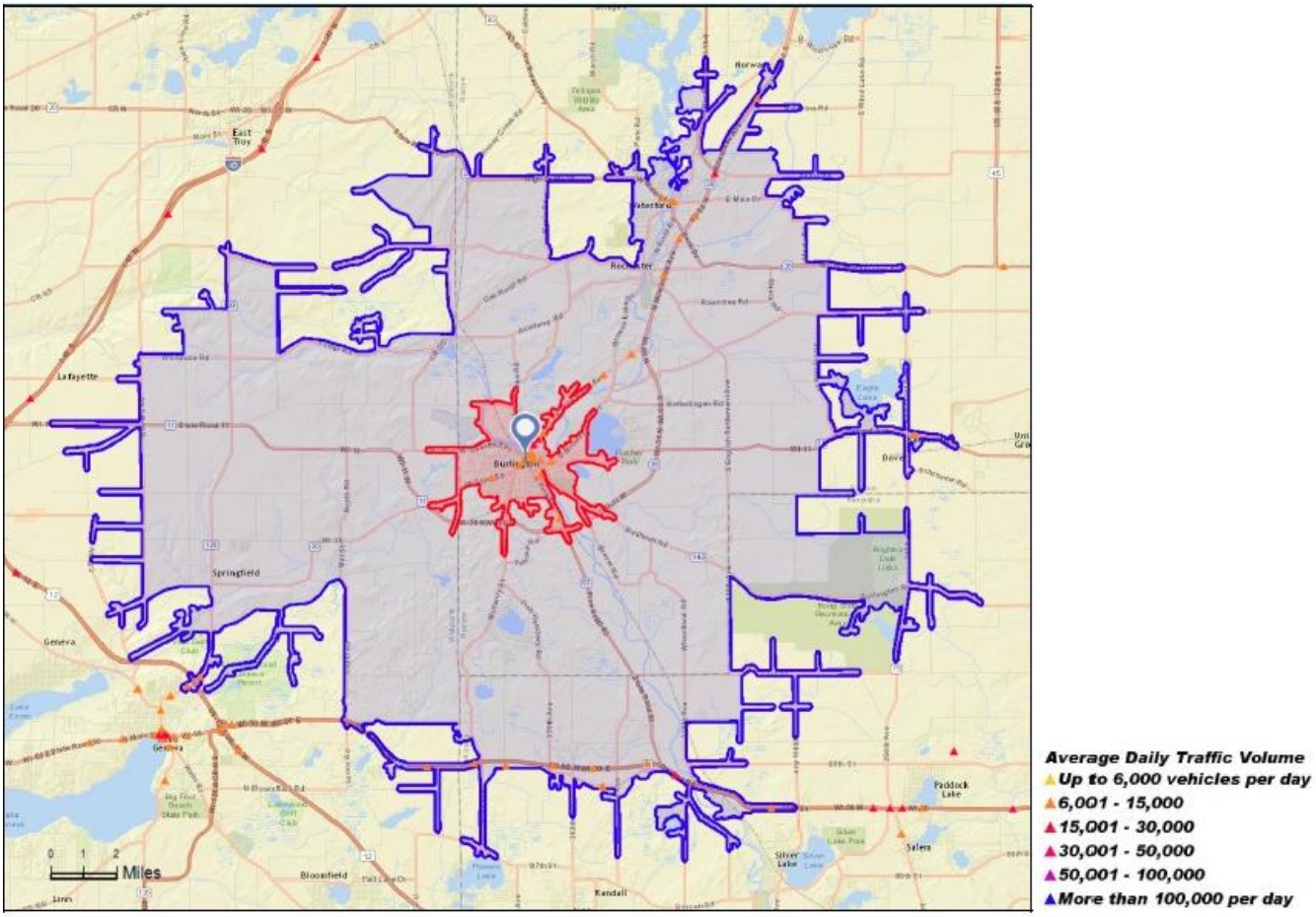
Traffic Data

Street and highway traffic volume provides an important indicator of travel through a community. Retailers typically seek locations on major arteries and often require minimum average daily traffic (ADT) counts. More specifically, the locations of businesses such as gasoline stations, convenience stores and fast food restaurants are based on traffic volume and the access to and visibility from high traffic streets and highways.

Examining traffic counts will aid in determining the feasibility of these types of businesses. Conversely, while high traffic counts are desirable, extreme traffic congestion can be a deterrent to shoppers. High traffic may hinder visibility, parking and pedestrian friendliness. The following map shows traffic counts throughout Burlington area.

While traffic counts are consistent throughout the Downtown (6,001-15,000 ADT), these considerable traffic counts are preferred by convenience businesses (with convenient parking available) and stores that need high visibility. On the contrary, higher counts of 15,001-30,000 ADT are noted along Milwaukee Avenue Commercial Corridor and are preferred by comparison businesses.

Exhibit 14: Traffic Volume Map



Resident Market Consumer Perspective

This section provides key findings from a consumer survey distributed by the Burlington Chamber of Commerce and one-to-one meetings with downtown business owners. The Chamber Survey gathered residents and consumers perceptions of the community. The one-on-one meeting with downtown businesses were conducted by RCEDC and the City provide insight into challenges and opportunities of being located in downtown Burlington. The results from the survey and the meetings, while not scientific, but provide valuable information to guide the development of the market analysis recommendations.

Survey Overview

The consumer survey conducted by the Burlington residents regarding the Community gathered insights from Burlington residents regarding the Community in general. The overall goal of the survey was to learn how current Burlington residents perceive the community and how to make it a more attractive and enjoyable place.

Conducted in spring 2015, the survey was made available online. Participants learned of the survey through social media (both by the Chamber and City Facebook posts), newsletter articles, and other social media blasts. 1,022 responses were gathered with 815 surveys being fully completed.

Survey participants completed a profile, providing their age; status of living or working in Burlington area, and/ or use of Burlington for shopping and other services.
Survey respondent profiles were predominantly:

- Between the ages of 21 and 55, making up 61% of the total survey respondents.
- Lived in the Burlington area at 92%
- Work in the Burlington area at 42%
- Shop in Burlington at 36%

Survey questions gathered general feedback about the community with the following topics relevant to the retail market study:

- Services that Burlington should expand upon in next few years - large retail, small retail, entertainment, recreation, restaurants, senior housing, child care, education etc.
- Importance of attributes like pedestrian friendliness, public safety, traffic flow, good paying local jobs, or historical preservation
- Services used by community and suggestions on new offerings
- Comments on what businesses and events could be attracted to downtown Burlington

Findings
Exhibit 15 (Appendix) summarizes responses from the Burlington survey.

Retail, Service, and Restaurant Opportunities
The consumer survey provided residents the opportunity to comment on services they would like to be located in in Burlington in next five years. Participants chose up to five options out of eleven. The most common responses were Restaurants (72%), Recreation (69%) and Large Retail (58%). Likewise, 41

percent participants chose small retail businesses they would most like to see in the community that includes craft stores, boutique, women's clothing, music shop etc. Other categories that scored well were Education (57%) and Entertainment (54%).

Attributes important to the community
Survey respondents were asked to rank the importance of community attributes such as pedestrian friendliness, public safety, traffic flow, good paying local jobs, and historic preservation. Two primary attributes scored well - public safety and good paying local jobs. Pedestrian friendliness and traffic flow got almost equal scores that followed the two primary attributes and is indicative of importance to the consumers.

Services Residents utilize and how to improve
The survey also asked for specific question on what keeps the residents in the Burlington area. Many responses noted community feel, schools, downtown, retail convenience, big box stores, local businesses, riverwalk, bike trails, parks and historic essence of the community.

Downtown Opportunities
Finally, the survey allowed participants the opportunity to comment generally on what they would like to bring to the downtown Burlington. Suggestions included: making the downtown a "riverside destination", farmers market similar to Waukesha, more retail oriented businesses as oppose to service oriented businesses in the downtown with an emphasis on locally owned businesses. Many comments noted restaurants, retail chains, gift shops and entertainment options. Fewer suggestions included clothing store, and specialty shops.

Downtown Business Owners One-On-One Meetings Overview

To understand the challenges and opportunities of the downtown business community, the City Administrator and RCEDC Community Development staff conducted one-on-one business meetings. Starting in May 2015, and by the date of this report, 34 businesses participated in the meetings (representing 34% of all downtown businesses). RCEDC staff will continue to schedule and meet with businesses through the end of 2015. The information compiled during the meetings will be used to update the 2008 Downtown Strategic Plan. A final report on the findings from these meetings is expected to be published by RCEDC in early 2016.

Findings
Exhibit 16 (Appendix) summarizes responses from the Business Meetings.

Downtown Strengths, Weaknesses, and Opportunities
When asked about Downtown Burlington's strengths as a place to do business, the common themes in responses involved "welcoming, quaint, small town atmosphere, historic look and character." Conversely, when asked about Downtown's weaknesses the responses included "not a lot of retail shopping opportunities, not a lot of family restaurants, old and new business owners don't see eye-to-eye, too many empty storefronts, not a lot of energy from business owners to participate in events and events are lacking energy, property maintenance issue with many buildings in disrepair.

Survey takers also asked, "If you had a crystal ball what [offerings] would you like to see in Downtown?" The common themes in the responses included "more restaurants and cafés (with variety, local, organic and family-friendly offerings), furniture resale shops, antique stores, retail stores that attract the younger

(20-30 year old crowd), women's clothing store with accessories such as scarves, and new events such as an Art Walk.

City service offerings and improvement opportunities

Another component of the business owner meetings was to collect feedback regarding the satisfaction level of business owners pertaining to City services. Overall, the respondents reported that they felt the City was clean and they like the planters and holiday decorations. Items repeatedly reported as unsatisfactory were the deteriorating condition of the brick pavers, traffic control and pedestrian safety in the major intersections in downtown (mostly Milwaukee Ave. and W. Chestnut St. and N. Pine St. and E. Chestnut St.). Also unsatisfactory was the City's enforcement of property maintenance code and vacant buildings that are falling into disrepair, snow consistently being pushed up onto the sidewalks by City plow trucks and lack of parking enforcement regulations for on-street parking by the City. Conversely, the City's Police, Fire and Rescue Department received consistently high ratings of satisfaction among business owners.

At the end of each business owner meeting, survey takers asked the question, "What can the City provide to your business that isn't currently being offered?" The most frequent responses included: downtown business association and a coordinated marketing program (including graphic design). Suggested focused of the coordinated marketing program would be to promote downtown as a "destination place", advertise the existing businesses and events occurring in downtown; and to attract new businesses to open in downtown, and develop new downtown events(ex. Restaurant Week, Taste of Burlington, Car Show, Buy Local Campaign and Art Walk).

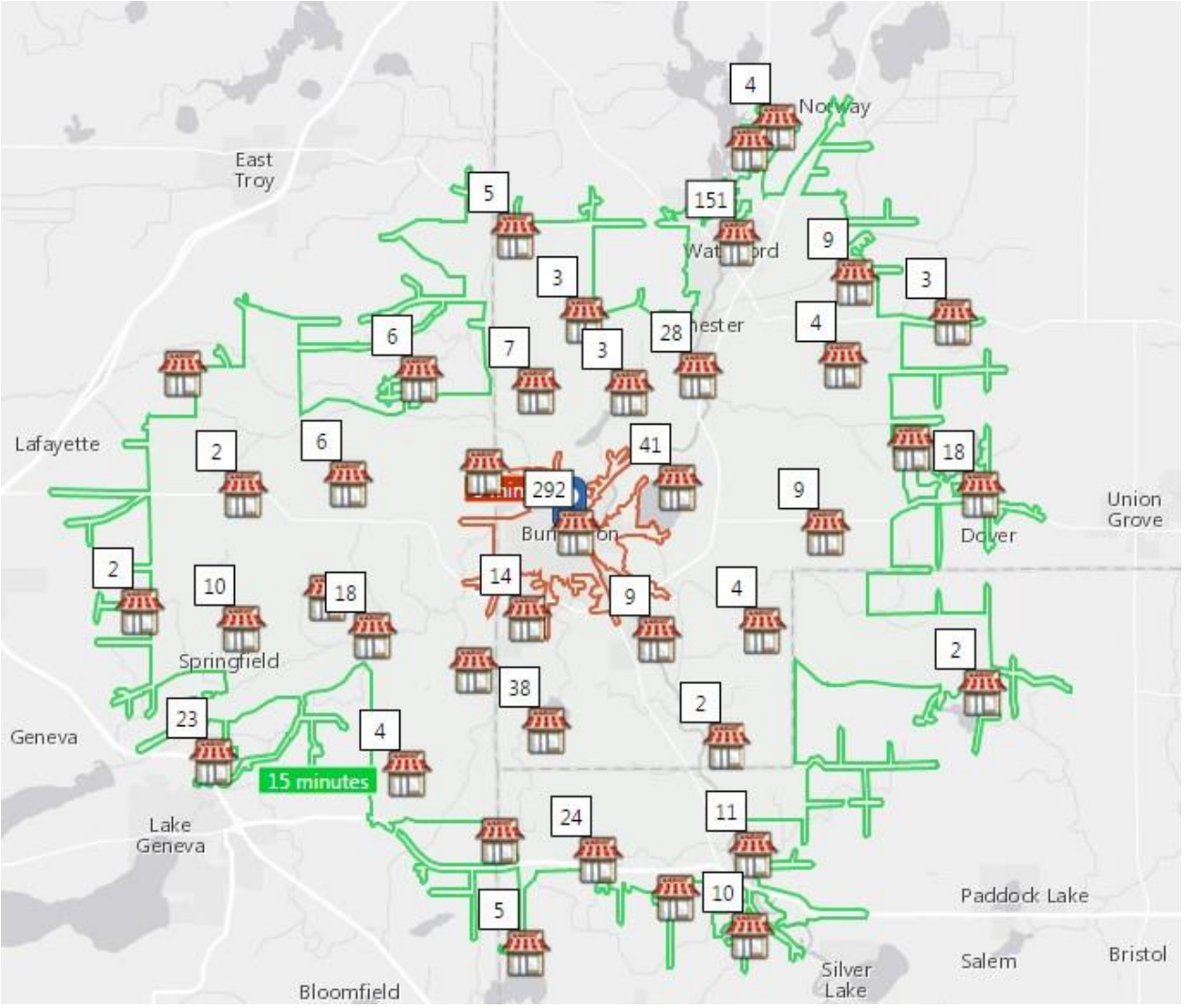
Market Area Business Mix Inventory

The composition of businesses in a community significantly influences its identity, attractiveness, and ability of area firms to capture sales. This section of the report provides a detailed inventory of businesses located in the community. An examination of downtown's business mix was also done in comparison with similar sized communities of Wisconsin to identify potential business mix strengths and opportunities.

Business Inventory

To analyze the supply of retail businesses a list of all of the area businesses under each industry sector was created to illustrate business mix activity (Exhibit 17 - Appendix) in the trade area extended up to 15 minutes drive time.

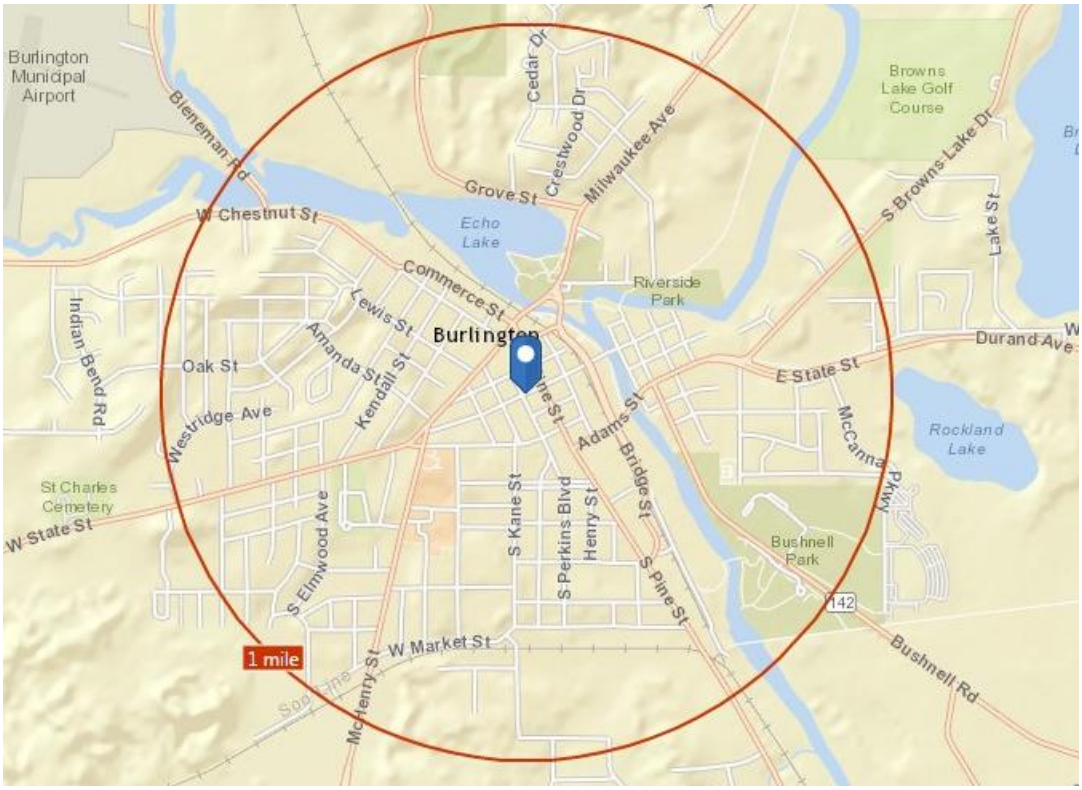
Exhibit 17: Map of number of retail trade and service businesses in the area



Downtown Business Mix Analysis

Downtown Burlington businesses operate in a regional retail economy that is characterized by large scale, suburban shopping destinations. The historic downtown district is bisected by the Fox River and the district is anchored by Veteran's Memorial Park, Schools and Aurora Healthcare Center.

Exhibit 17(a): Downtown businesses within a mile radius



Downtown Businesses include: florists, shoe store, arts/ antiques; clothing; furniture store; bars/taverns, restaurants/café/ice cream, financial services-insurance, tax, mortgage; personal care; and medical/dental/chiropractor. Burlington's convenience retailers like grocery, drug, and hardware stores and lodging are all located on the periphery of downtown and comparison retailers/ shopping centers like Walmart, Menards, and Kohl's are located along the Milwaukee Avenue commercial corridor.

Downtown Comparison to Similar Size Wisconsin Communities

The analysis includes a comparison of downtown activity in similar size Wisconsin communities (with populations 10,000 to 25,000). The comparison group includes 60 cities and villages. The average number of businesses per downtown in these communities is compared within a mile radius of Burlington's downtown to evaluate strengths of business mixes and is presented in Exhibit 18. Communities in this group include: Baraboo, Beaver Dam, Cedarburg, Chippewa Falls, Cudahy, De Pere, Fitchburg, Fort Atkinson, Germantown, Glendale, Grafton, Hartford, Kaukauna, Little Chute, Marinette, Marshfield, Menasha, Menomonie, Mequon, Merrill, Middleton, Monroe, Muskego, Neenah, Oconomowoc, Onalaska, Pleasant Prairie, Plover, Port Washington, River Falls, South Milwaukee, Stevens Point, Stoughton, Sun Prairie, Two Rivers, Watertown, Waupun, Whitewater, and Wisconsin Rapids.

Exhibit 18: Downtown Burlington in comparison to similar sized WI communities

NAICS	NAICS Description	Burlington Downtown		Average in Comparison Downtowns	
		Number	Sales (000's)	Number	Sales (000's)
44111000, 44112000 81111000, 81112000 & 81119000	Automobile Dealers and mechanical and electrical repair	5	17,131	9.75	21,216
44121000 & 44122000	Other Motor Vehicle Dealers	3	483	0.72	2251
44130000	Automotive parts, accessories, & tire stores	2	1,729	1.79	2,180
44210000	Furniture stores	0	0	1.03	2,322
44220000	Home furnishings stores	2	858	1.18	1,127
44311000, 44312000 & 44313000	Electronics & Appliance Stores	2	1,030	3.57	6,231
44411000, 44412000, 44412000, 44413000 & 44419000	Building Materials & Supplies Dealers	2	1,961	3.67	8,866
44420000 & 81141000	Lawn & garden equipment & supplies stores and repair	0	0	1.76	1,795
44510000	Grocery stores	5	20,394	2.33	23,235
44520000	Specialty food stores	0	0	1.59	1,593
44530000	Beer, wine, & liquor stores	0	0	1.13	2,261
44611000, 44612000, 44613000 & 44619000	Health & Personal Care Stores	6	7,093	3.28	7,452
44710000	Gasoline stations	5	38,303	3.08	9,637
44811000, 44812000, 44813000, 44814000, 44815000, 44819000	Clothing Stores	2	337	3.95	4109
44821000	Shoe stores	1	142	0.77	764
44831000 & 44832000	Jewelry, Luggage & leather goods stores	1	514	2.10	2,036
45111000, 45112000, 45113000 & 45114000	Sporting goods/ Hobby/ Musical Instr. Stores	8	1,024	4.03	3,204
45121000 & 45122000	Book, Periodical & Music Stores	0	0	1.15	2,374
45200000	General merchandise stores	3	2,717	1.67	12,438
45310000	Florists	2	100	2.08	2,527
45321000 & 45322000	Office supplies, stationery & gift stores	1	47	4.10	2040
45330000	Used merchandise stores	2	151	2.54	1,168
45391000 & 45392000	Other miscellaneous store retailers	6	2,458	1.33	965
54192000	Photographic services	-	-	2.31	791
72210000	Full-service restaurants	8	5,050	15.77	11,548
72220000	Limited-service eating places	9	4,789	2.08	806
72240000	Drinking places (alcoholic beverages)	6	601	8.31	2,900
81211200	Beauty salons	1	-	10.54	2,383

81211300	Nail salons	0	0	1.36	183
81219000	Other personal care services (tattoos, spas, piercing)	0	0	0.44	903

The representation of number of stores in most of the industry sectors seems to be valid based on the lifestyle segment that indicates that the area population largely holds blue collar jobs and ageing/retiring population who tend to spend less on goods and more on services and experiences. This segment mix could be attractive for dining and other entertainment uses. In comparing Downtown Burlington to the other communities, several sectors appear to be underrepresented and include convenience categories such as gifts, bookstore, office supplies/ stationary store and clothing store. Further exploration of market demand for these categories may be warranted to determine fit with Downtown Burlington's future retail strategy.

One area of note in the data are the larger number of limited service restaurants (coffee shops/ drive through or fast food joints) that operate and attract customers in Downtown Burlington compared to its peer communities. This effect may present an opportunity to identify complimentary businesses and services that would benefit from attraction to the business cluster within downtown. Special attention should be given to those business categories that are most suitable for a downtown storefront location and that were found in many of the comparison downtowns.

Retail Gap Analysis

Retail gap analysis (or leakage analysis) is a technique for quantifying how well the current mix of retailers in any area, such as the community or downtown or any commercial corridor, meets the consumer market demand of surrounding residents. The analysis estimates how many shoppers are coming to the community to purchase retail goods and the extent to which the community is capturing the retail spending potential of households residing both inside and outside of the community's trade areas. The loss of retail sales that occurs when people do not shop in the area where they live is generally referred to as retail (or market) "leakage." Conversely, a retail "surplus" exists if the actual retail sales within the community exceed the potential sales that could be generated by households living within the community's trade areas. In general, the gap analysis identifies specific industry sectors that are either thriving or underserved in the community. Excessive leakage represents an opportunity for future business development within the retail categories in the area. In some cases, a surplus indicates a specialty cluster of businesses in the vicinity that draws customers from a larger trade area.

To identify the purchasing power of households within the trade area and compare their total spending potential to the capacity of existing retailers to accommodate consumer market demand, a gap analysis was completed using ESRI Business Analyst. As described in Exhibit 19, retail leakage figures (shown as positive numbers) reflect industry sectors where a percentage of trade area households' spending potential is spent in competing retail corridors. Retail surplus figures (shown as negative numbers) indicate industry sectors capturing more than their proportionate share of the trade area's retail spending potential. The aggregate retail demand and supply data is presented in the *Snapshot* above and indicates:

- A $46 million surplus within 0-5 minute drive time trade area in the retail trade and food and drink industries. This indicates customers are drawn in from outside the trade areas.
- A $109 million leakage within 5-15 minute drive time trade area in the retail trade and food and drink industries. This indicates most of the residents in the trade area are spending on retail activities and services both within the trade area and areas outside the trade area boundaries.

Exhibit 19: Retail Marketplace Profile – Snapshot

	0-5 minute drive time		**5-15 minute drive time**	
	Front Porches (8E) – 29.5% *Green Acres (6A) – 22.3%* *Middleburg (4C) – 15.2%*		*Green Acres (6A) – 31.7%* *Salt of the Earth (6B) – 18.0%* *Parks and Rec (5C) – 14.6%*	
Industry Summary	**Retail Gap**	**Leakage/ Surplus Factor**	**Retail Gap**	**Leakage/ Surplus Factor**
Total Retail Trade and Food and Drink (NAICS 44-45, 722)	-$46,172,271	-16.6	$109,645,515	13.8
Total Retail Trade (NAICS 44-45)	-$43,792,874	-17.4	$89,627,177	12.3
Total Food & Drink (NAICS 722)	-$2,379,396	-9.1	$20,018,338	28.2

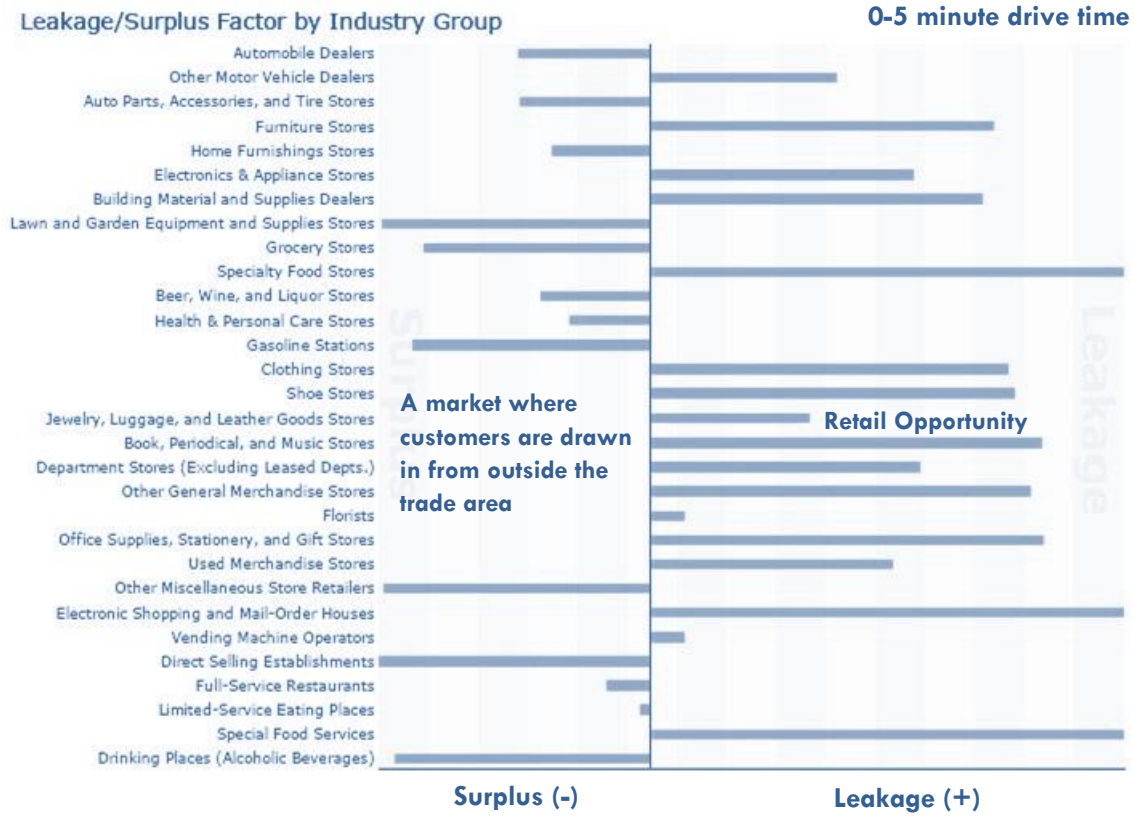
Data Note: *The Retail Gap includes difference between Demand & Supply. In calculation, Supply (retail sales) is the estimated sales to consumers by establishments (sales to businesses are excluded.)Demand (retail potential) estimates are the expected amount spent by consumers at retail establishments. Supply and demand estimates are in current dollars. A positive value represents 'leakage' of retail opportunity outside the trade area (i.e. consumers are going outside the community to purchase from the category). A negative value represents a surplus of retail sales, a market where customers are drawn in from outside the trade area.*

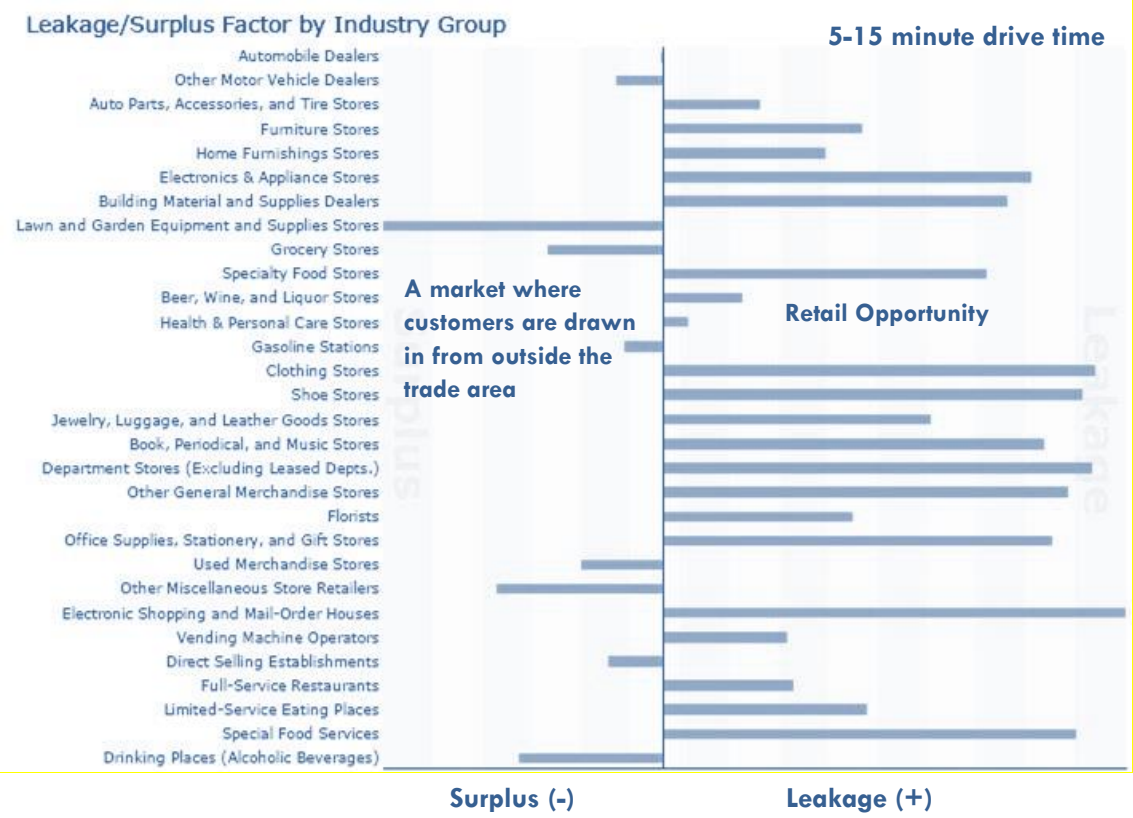
A closer look on retail industry subsector performance as presented in Exhibit 19 (a) - Appendix reveals that within 0-5 minute drive times, Health and Personal Care, Food Services and Drinking Places, Food and Beverage Stores, Motor Vehicles and Part Dealers, Gas Stations, Miscellaneous store retailers outperformed other industry subsectors. Within the 0-5 minute trade area, other retail subcategories signal a leakage of consumer activity with residents going outside the area to purchase goods and services that are not available locally. Some of these industry subsectors that indicates significant leakage and must be further investigated for validation include specialty food stores, building materials and supply dealers, special food services restaurant, office supplies, stationary, and gift shops, books periodicals and music stores, clothing stores, and shoe stores.

On the contrary, within 5-15 minute drive times trade area, most retail categories indicate a "*leakage*" except for automobile dealers and auto parts stores, grocery stores, lawn and garden supply store, drinking places and miscellaneous store retailers. The leakage indicates potential opportunity for greater retail capacity to serve the local market. Accordingly, the area may be able to support new (or existing) businesses within these subsectors. The industry subsectors that experienced the most significant leakage - clothing and clothing accessories stores, general merchandise stores, food services and drinking places, and electronics and appliance stores) could present the strongest opportunities for new businesses.

Market research findings provide general direction and are a good starting point for the design of an effective, market-driven business development strategy Still, retail categories and subcategories showing potential for expansion and growth based on ESRI data must be further analyzed and, with the contribution of local input and expertise, interpreted to better understand the local and regional conditions and factors that could be driving the results and possible implications.

Exhibit 19 (a): Detail of Retail Marketplace Industry Subsector

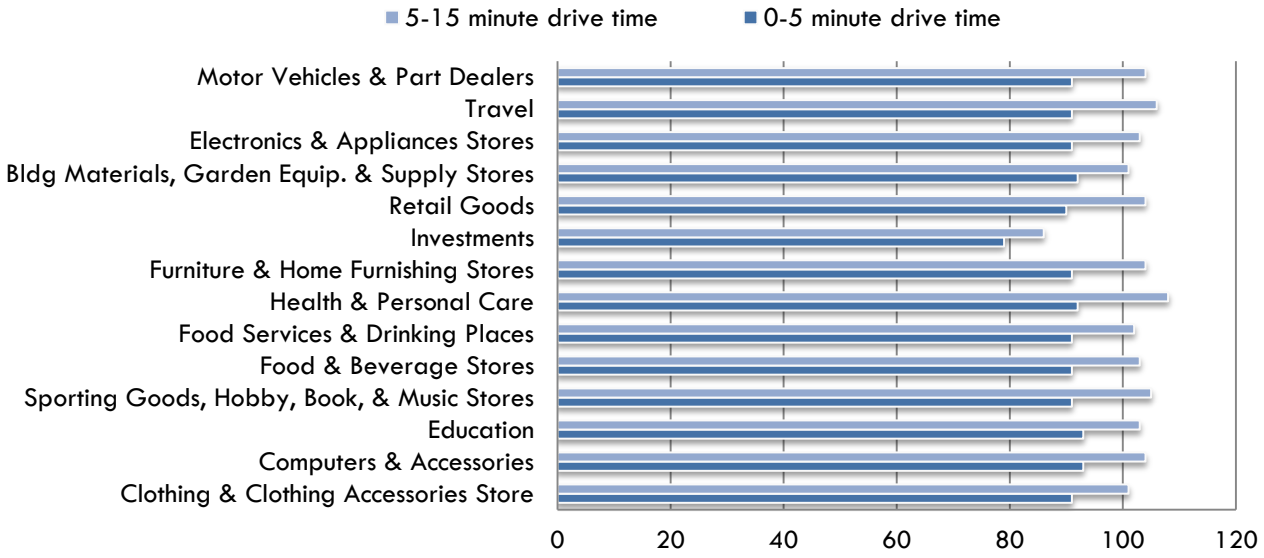




Spending Patterns of Trade Area Households Compared to the U.S.

Spending is influenced by demographic, economic and geographic factors. Demographic and lifestyle characteristics of the trade area help describe the type of consumers residing in these areas, and their likely purchasing preferences and behaviors. Nearly half of the trade area households are described by ESRI as "Front Porches, Green Acres and Salt of the Earth."

Exhibit 20: Spending Potential Index



Within the 0-5 minute drive time area, the lifestyle segment group indicates that the area population largely has blue collar jobs, have lower to moderate incomes, and represent a mix of young families and an ageing/retiring population. This has implications for retail as these groups tend to spend less on goods and more on services and experiences. These segments spending patterns could be attractive for dining and other entertainment uses. In the 5-15 minutes drive time area, lifestyle segments include a mix of moderate to high income residents, who are empty nesters approaching retirement age. This group tends to spend money on their homes, garden and leisure activities, which can be attractive for building supply, home and garden supplies, and other entertainment uses.

As a general overview of consumer spending by trade area residents, it is helpful to compare local household spending with average U.S. household spending (*Average of 100*). The SPI for selected product categories are listed in Exhibit 20 - Appendix.

Consumer spending potential in the 0-5 minute drive time trade area is less than the U.S. average in all of the categories. This observation validates the resident's consumer behavior (for example these groups are dominated by blue collar workers who are highly cost conscious) and have lower spending potential. Consumer spending potential in the 5-15 minute drive time trade area is moderately higher than the U.S. average in almost all categories. The SPI index is highest for health and personal care, retail goods, entertainment and recreation, household furnishings and equipment, restaurants and drinking places, and grocery stores, indicating opportunities to attract more diverse retail.

Supply Analysis

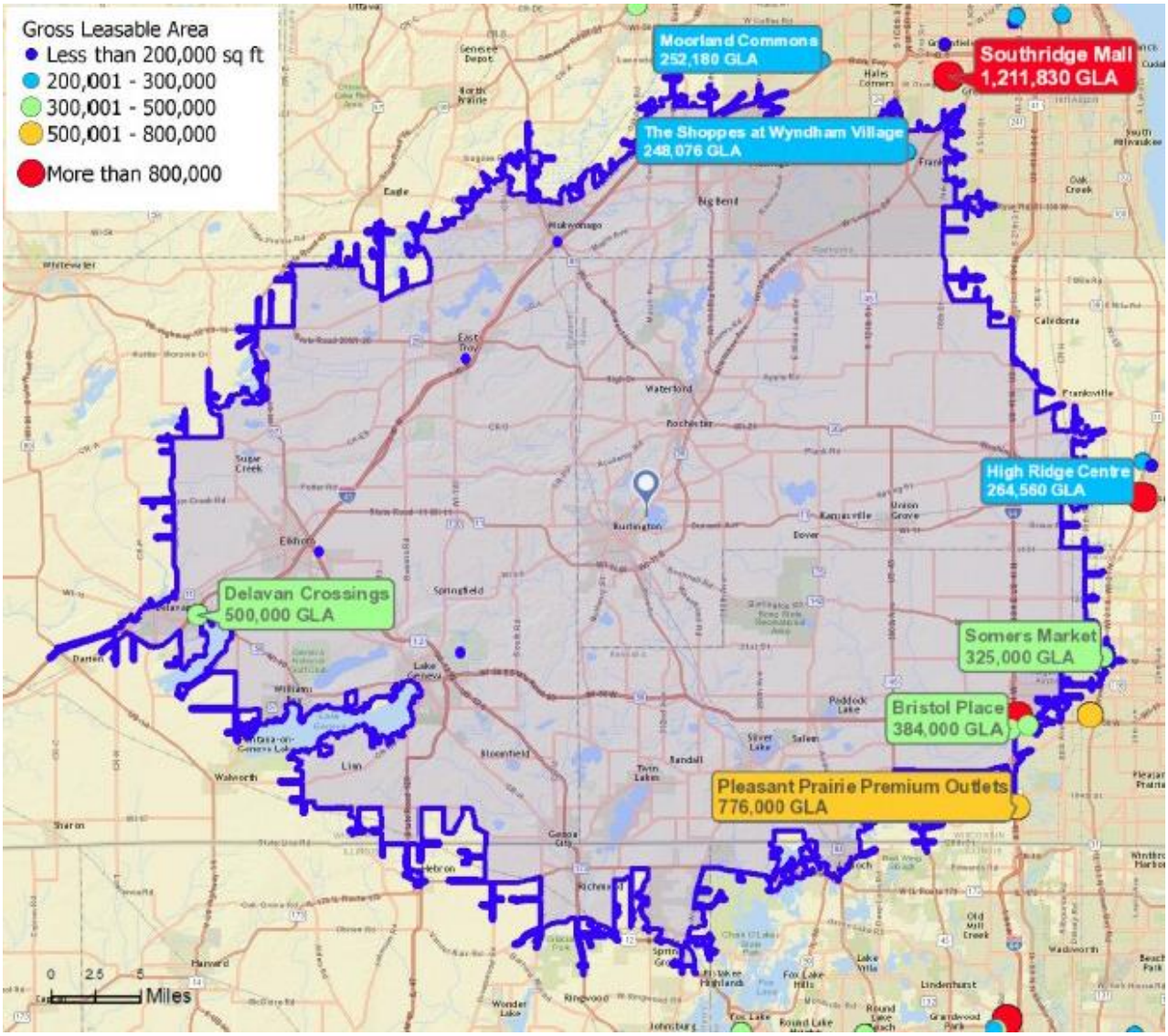
Burlington's current retail supply is divided between two retail hubs:

- Downtown which is home to local retail shops and exhibits a historic community vibe located along the south-west bank of the Fox River; and
- Milwaukee Avenue which is characterized by large chain retailers like Walmart, Menards, and Pick n Save located on Milwaukee Avenue commercial corridor along the north-east side of the Fox River. Exhibit 17 - Appendix indicates retailers and businesses in the community.

The downtown and commercial corridor not only serves the residents and workers in the community but also attracts consumers and visitors from Waterford, Dover, and Union Grove. Due to the competing retailers (Exhibit 21) located in nearby communities of Lake Geneva, Elkhorn, Mukwonago, and Bristol that serve Burlington residents and consumers, the retail mix should be examined through a regional lens. The likely retailers to locate to the Milwaukee Avenue Commercial Corridor include comparison shopping retailers and franchise stores. Exhibit 19 - Appendix provides insights on the opportunities under different industry subsectors that could potentially be supported by the consumers in the trade area.

With the City's emphasis on retaining its historic charm; the likely retailer opportunities in the downtown include local convenience shopping and restaurants. A retail strategy should be considered to promote more local businesses in the historic downtown with a configuration to maximize retailer exposure.

Exhibit 21: Competition retailer's location map



Land Use Study

A number of resources were utilized in the land use study portion of the analysis. City planning documents were reviewed including the Racine County Multi-Jurisdictional Comprehensive Plan-2035, 2008 Downtown Master Plan, and the 2010 and 2015 Park, Open Space and Trails Plan.

Locational Characteristics

The City has a number of locational characteristics that will have a very large bearing on the type and quantity of retail activity that can be accommodated. The City is well situated on State Trunk Highway 11/83/36 for retailing that relies on convenient freeway access for patrons from outside of the immediate area. Milwaukee Avenue to State Street, to a somewhat lesser extent, offers northeast-southwest passage through the City for non-local traffic from outside the City. Pine Street and Chestnut Street also provides passage through the City for non-local traffic, in a southwest and west direction. The Canadian Rail Line provides light rail access through the City whereas the City is also served by Burlington's municipal airport. Major retail areas in the nearby communities are direct competitors to the retail commercial districts, carrying most of the categories of goods and services offered in Burlington.

Existing Land Use Patterns

Commercial Locations

The City has two primary commercial districts

A. Historic Downtown
B. Milwaukee Avenue Commercial Corridor

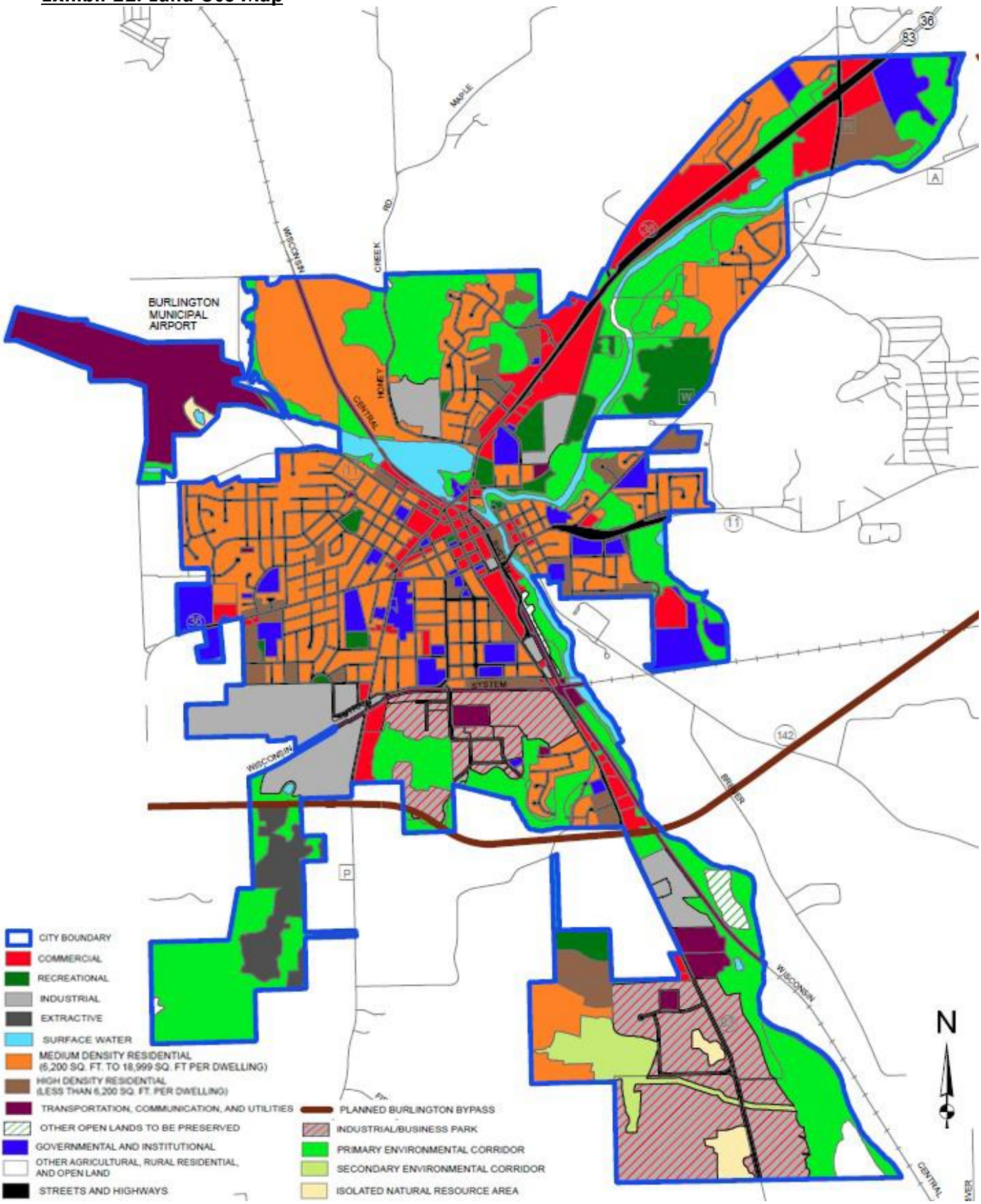
These commercially zoned areas are shown in Exhibit 22. Commercial uses also exist on South Pine Street (an extension of the historic downtown) and individual/fragmented commercial uses extending from the Town of Burlington.

Recent Proposed Developments

To better understand the potential for new development in the City, recently proposed developments were reviewed. The purpose of this review is to understand the type of projects that developers believed the market would support, the City's reaction to the proposals, and extent to which the market confirmed the developers expectations. Since this year, there have been some of the projects submitted to the City that required some level of discretionary approval. The projects ranged from office to mixed use (retail and residential). These projects are as follows:

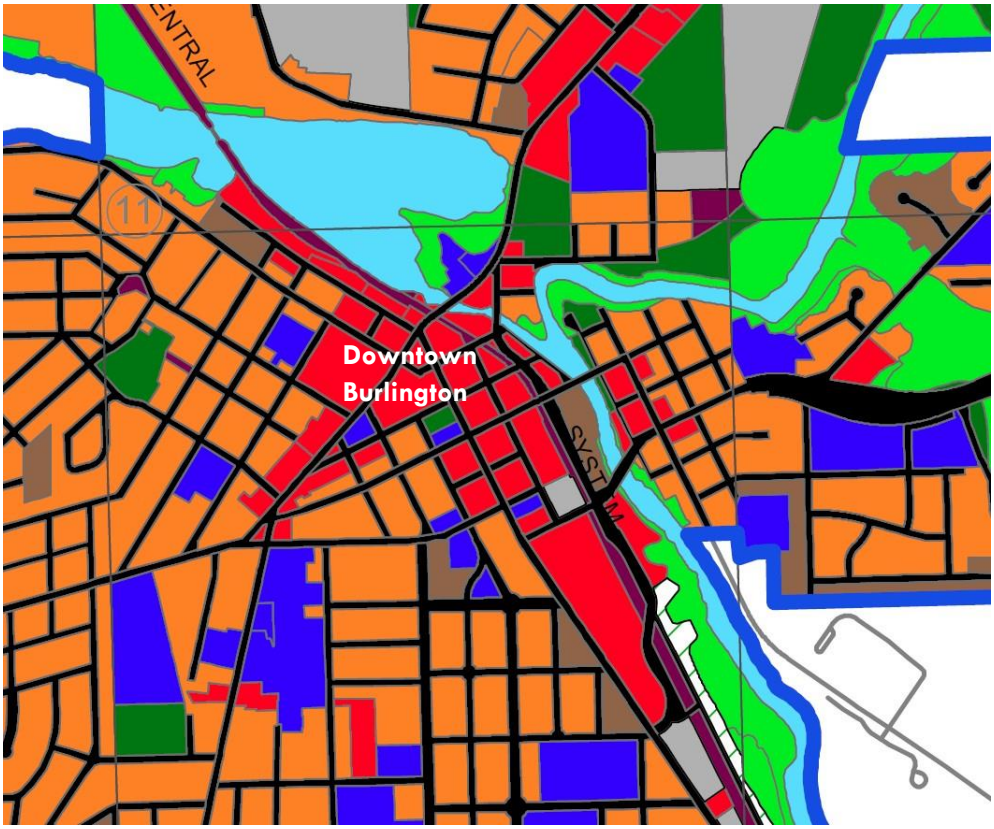
A. Aurora Healthcare
B. 24- unit apartment building at 200 Bridge Street with phase II for a 32-unit apartment building
C. Furniture Store Renovation in Downtown

Exhibit 22: Land Use Map



Opportunities and Constraints for Future Development

Exhibit 22 (a): Downtown land use map



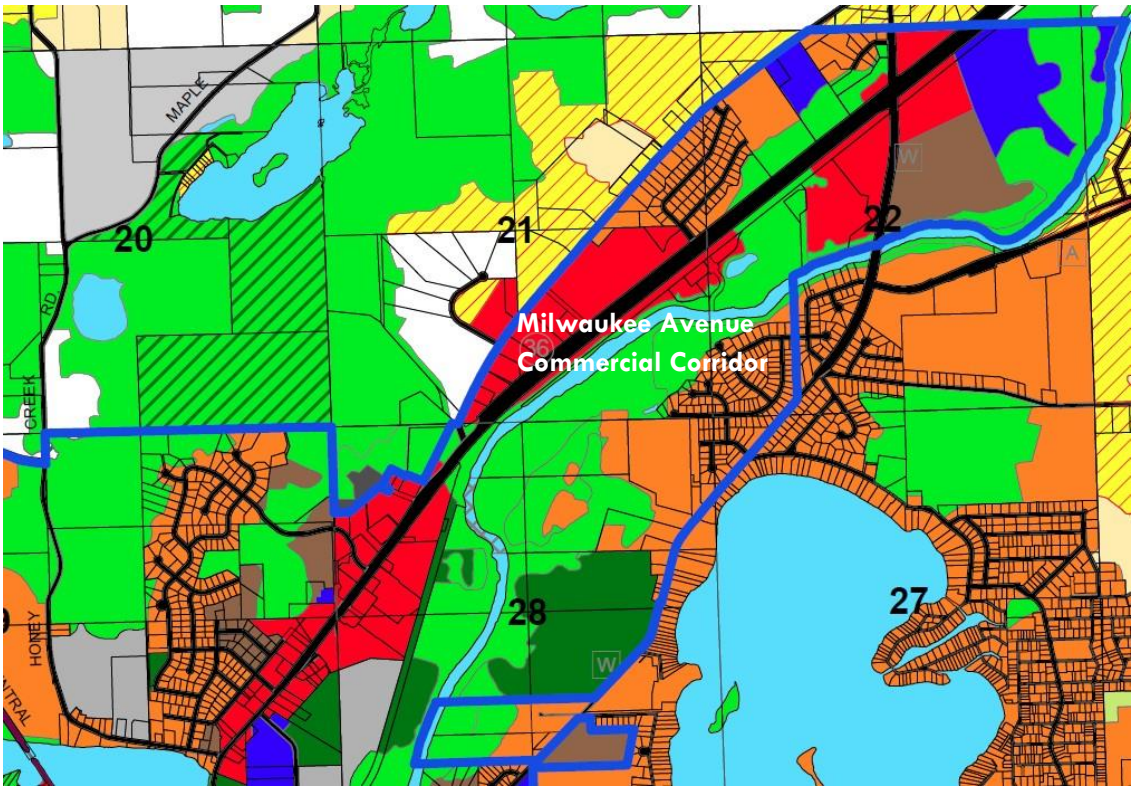
The Historic Downtown has the following characteristics that contribute in a positive way to formulating a strategy for future retail development:

- Distinctive architectural character
- Potential for pedestrian friendly uses
- Presence of existing businesses with a convenience/quick serve food orientation or compatibility
- Diverse store mix
- Favorable demographics for retailing

Aspects of the Historic Downtown that would constitute constraints are the following:

- Small parcels and some functionally obsolete improvements like furniture store that's burned down by fire.
- Presence of some property owners that have been resistant to coordinated revitalization efforts
- Lacks as a "Destination Place" image

Exhibit 22 (b): Milwaukee Avenue Commercial Corridor land use map



Following characteristics contribute in a positive to formulating a strategy for future retail development along the commercial corridor:

- Attract customers from other communities resulting in larger demographic base for retailing
- Higher density development potential
- Larger parcels favorable for shopping centers/ franchise/ big box retailers
- Offers behavioral clustering effect based on the lifestyle segment
- Adequate Parking

Aspects of the commercial corridor that would constitute constraints are the following:

- Unanchored commercial corridor with fragmented strip malls, restaurants, few office buildings, and franchise stores.

Taken in combination both the opportunities and constraints should be considered in the development of a comprehensive new retail strategy for both focus areas.

Retail Opportunity & Next Steps

The Retail Market Analysis Reports point to unmet demand for retail goods and services for Burlington's trade market area. Based on the data, these elements should be considered:

- **Respond to consumer needs**
  Increase the capture of the convenience within 0-5 minutes drive time trade area by providing more goods and services tailored to the daily needs of the residents and surroundings.

  Additionally, businesses must continue to seek opportunities to serve the general population of the comparison trade areas serving consumers within 5-15 minutes drive time trade area that potentially could also increase the convenience market capture rates of consumers within Burlington. Additional market segments might emerge as Burlington community grows and changes.

- **Encourage business development in selected industry subsectors**
  Data from this study could be used to provide assistance to businesses in how to penetrate the existing market more effectively and to initiate a proactive retail recruitment program. Retail gap analysis based on predominant customer segments and their spending behavior indicates that within the convenience trade area of 0-5 minute drive times, overall broad industry subsectors exhibit "*surplus*" indicating local demand is being met and outside consumers are coming into the community to purchase goods. Despite the overall surplus, there is significant retail leakage spread (i.e. local consumers are spending outside the community for products) across many subsectors, including specialty food stores, building materials and supply dealers, special food services restaurant, office supplies, stationary, and gift shops, books periodicals and music stores, clothing stores, and shoe stores.

  On the contrary within the comparison shopping trade area of 5-15 minute which serves a broader market area almost all of the retail categories exhibit a "*leakage* "with consumers purchasing goods outside the market area. Accordingly, the area may be able to support new (or existing) businesses within identified sub sectors. The industry sub sectors that experienced the most significant leakage and present the strongest opportunities for new business development are–clothing and clothing accessories stores, general merchandise stores, food services and drinking places, and electronics and appliance stores.

- **Land use characterization**
  In the downtown area, there is opportunity to leverage the City's historic charm and location along the Fox River to create a "destination place." In developing and implementing a retail strategy, small retail site size must be taken into consideration.

  In the Milwaukee Avenue corridor, larger sites, high traffic volume and exposure, and ease of access should be considered in developing a retail strategy that increases clustering of larger retailers to create a high density shopping hub that attracts customers from other communities.

- **Retail Agglomeration encouraged**
  In Downtown Burlington, the expansion of existing and recruitment of businesses in in-demand retail categories (i.e. categories exhibiting a retail leakage) and compatible categories could strengthen downtown's appeal and may attract a higher volume of target consumers. Examples of businesses that together would have a stronger draw when clustered together in downtown and exhibit a retail gap include restaurants/cafés, gift shops, office and office supplies, stationary, and gift shops, books periodicals and music store, apparel stores and home furnishing/decorating stores.

  Along Milwaukee Avenue, the current agglomeration of big box/ franchise/ large retailers can be leveraged to attract retailers of the same type or different types with synergistic potential to draw customers from beyond the market area. Potential retailers based on the retail gap analysis are clothing and clothing accessories stores, food services and drinking places, and electronics and appliance stores.

- **Create an Environment that is supportive of Retail**

  - **Downtown**

    a) *Enhance and Promote Downtown as "Destination Place"* - Downtown Burlington historical character and uniqueness can be leveraged as a competitive advantage to attract and support retail. The multifunctional downtown that is generally pedestrian-friendly hosts a variety of uses from residential to office to retail. This diversity provides retailers with numerous market segments and foot traffic at various times of the day.

       Downtown's destination place image can be enhanced by continued efforts to bolster activity and events that encourage people to linger and relax (and shop) in the area. Examples could include events like Farmer's Market, Taste of Burlington, Car Show, Buy Local Campaign and Art Walk. One goal of these events would be to renew people's feeling of community ownership in the downtown area.

    b) *Co-Exist, but not compete with the Milwaukee Avenue Commercial Corridor* - The Milwaukee Avenue Commercial Corridor and its nearby retailers represent the primary regional shopping district in Burlington area. The area includes shopping centers, as well as discount department stores and big-box retailers. Downtown retailers will most likely be successful if they provide a locally-based shopping experience. Accordingly, downtown Burlington should not try to compete with the retail available in the Commercial Corridor. Rather, a Downtown retail strategy should complement current community retail by focusing on niche market segments and a unique destination place that doesn't exist in the Commercial Corridor.

  - **Milwaukee Avenue Corridor**

    a) *Anchor Milwaukee Ave Corridor* – Currently, retail uses along the Milwaukee Avenue Corridor are fragmented. Although there is a wide base of businesses, store locations are appear random and are not configured in a clustered pattern or anchored with consistent identity. Retail along the corridor depends on auto driven, single destination stops. The retail mix, therefore, is mostly a series of stand-alone retail islands, with little to no possibility of any pedestrian cross shopping or sense of place. Future development opportunities may consider encouraging more infill development and retail clustering to facilitate ease of shopping between centers and attraction of a broader customer base.

Next Steps:

Retail business development is an economic development function with a distinct array of component parts. The City plays an important role in what is ordinarily a market function by taking the lead in organizing, facilitating, and supporting a defined retail development strategy.
Following are the most vital principles to keep in mind while developing that strategy and pursuing quality retail tenants:

- Define Expectations – Initially, the retail strategy may choose a primary focus area- Downtown or Milwaukee Avenue Commercial Corridor. This will provide a starting point in articulating specific goals in the direction for developing unique retail offerings and establishing appropriate land use guidance and improvements. The strategy can be revised as success is achieved.

- Involve property owners - Without the cooperation and participation of property owners, retail recruitment efforts will have very limited success.

- Identify, cultivate and attract tenants - Based on inferences from retail gap analysis and input from the community and businesses surveys, targeted industry subsectors for the focus areas should be further refined. This report provides the high level overview of target sectors such as specialty restaurants and eating places, and miscellaneous retail trade in the Downtown area and appliance stores, department stores, and restaurants and eating places for Milwaukee Avenue. A further drill-down of "targeted subsectors" will give the City a more detail overview from which to pursue targeted retailers for the focus areas.

  For example, the underlying subsectors of restaurants can be examined further and would include customers of the trade area who went to family/ restaurant/ steak house, or who went to fast food store/ drive-in restaurants. Other details are available such as level of service (i.e. take-out, sit-in, or drive-through), type (which restaurant chains), and frequency (last month, last 6 months) consumers have visited these establishments.

- Retail Strategy Validation - To ensure successful development and validation of data underpinning any retail strategy, discussions with potential retail businesses, commercial property brokers, managers and site selectors, trade organizations and quality tenants will be necessary to ensure that the retail gap analysis matches what site attributes target retailers are seeking in a location.

Assumptions & Limitations

- The recommendations contained in this report are based off of data and no responsibility is accepted by the author for the results of actions taken by others based on information contained herein.
- The illustrations, photographs, and other exhibits in this report are solely for the purpose of assisting the reader in visualizing the property and the market data. The author made no property survey, and assumes no liability in connection with such matters.
- The author reserves the right to make changes, corrections, and/or improvements at any time and without notice. In addition, the author disclaims any and all liability for damages incurred directly or indirectly as a result of errors, omissions, or discrepancies.
- The author disclaims any liability due to errors, omissions, or discrepancies made by third parties whose material were relied on in good faith to produce the report. Any statements involving matters of opinion or estimates, whether or not so expressly stated, are set forth as such and not as representations of fact, and no representation is made that such opinions or estimates will be realized. The information and expressions of opinion contained herein are subject to change without notice, and shall not, under any circumstances, create any implications that there has been no change or updates.
- The data used in this report is furnished by ESRI's Business Analyst Application, and it uses data from various sources. As such whenever using this data for any purposes the source must be acknowledged properly.
- All of the data used in the report was based off of the assumptions that were confirmed by the Client before the analysis. Acceptance of and/or use of this report constitute acceptance of all assumptions and the above conditions. Estimates presented in this report are not valid for syndication purposes.
- An evaluation of the market area for the property is based off of the most recent data available through ESRI and made as of a certain point in time. Due to the principles of change and anticipation the market estimate is only valid as of the date of valuation. The data provides a general representation of the market area and should be validated further through discussions with the community and potential tenants in the proposed development.
- The report was made assuming responsible ownership and capable management of the property.
- Possession of the report, or a copy thereof, does not carry with it the right of publication, nor may it be reproduced in whole or in part, in any manner, by any person, without the prior written consent RCEDC. Neither all nor any part of the report, or copy thereof shall be disseminated to the general public by the use of advertising, public relations, news, sales, or other media for public communication without the prior written consent and approval of RCEDC.

Appendix

Exhibit 1: Trade Area Boundary

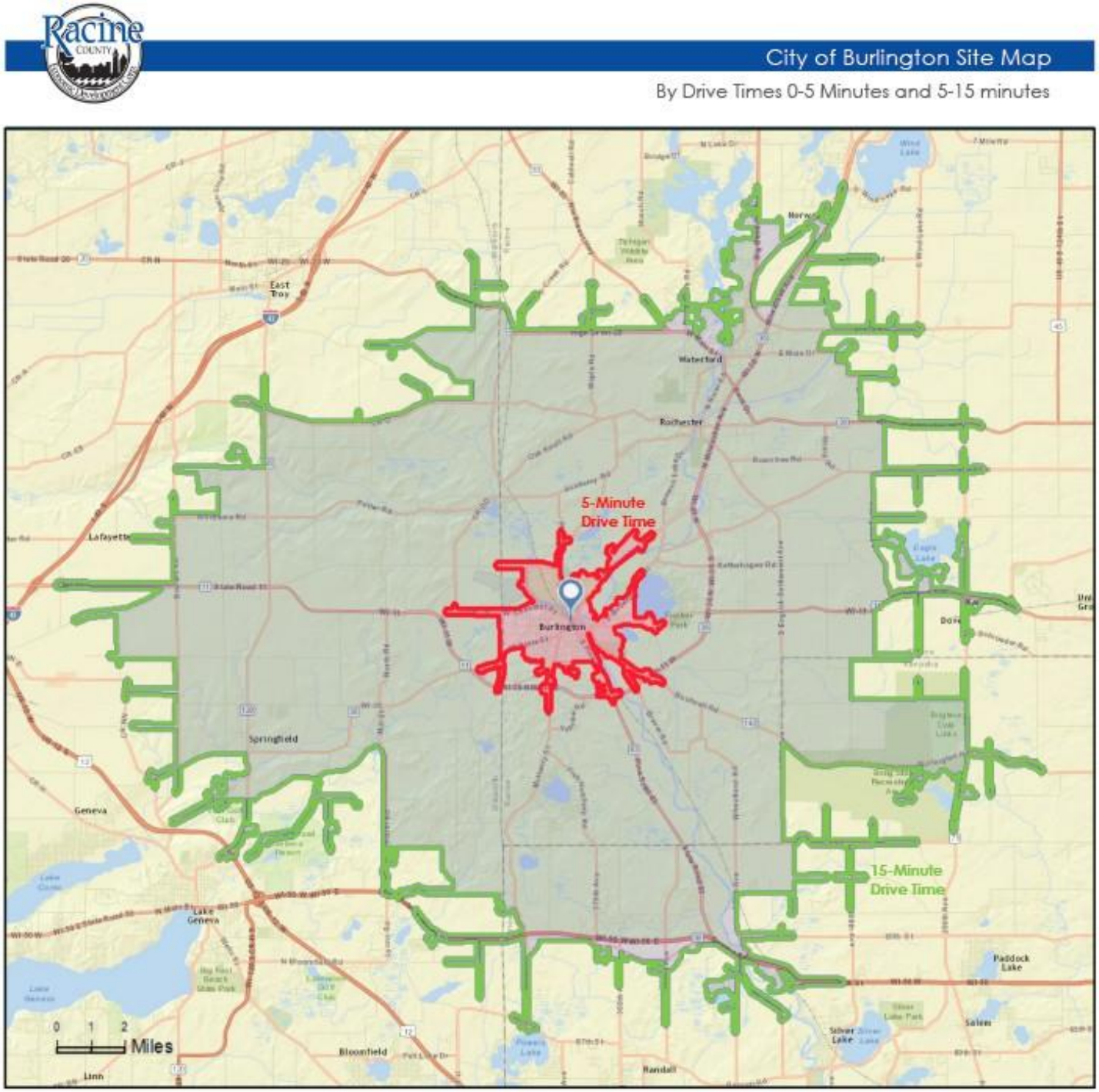


Exhibit 2: Downtown Burlington Boundary

Exhibit 3: Milwaukee Avenue Corridor Boundary

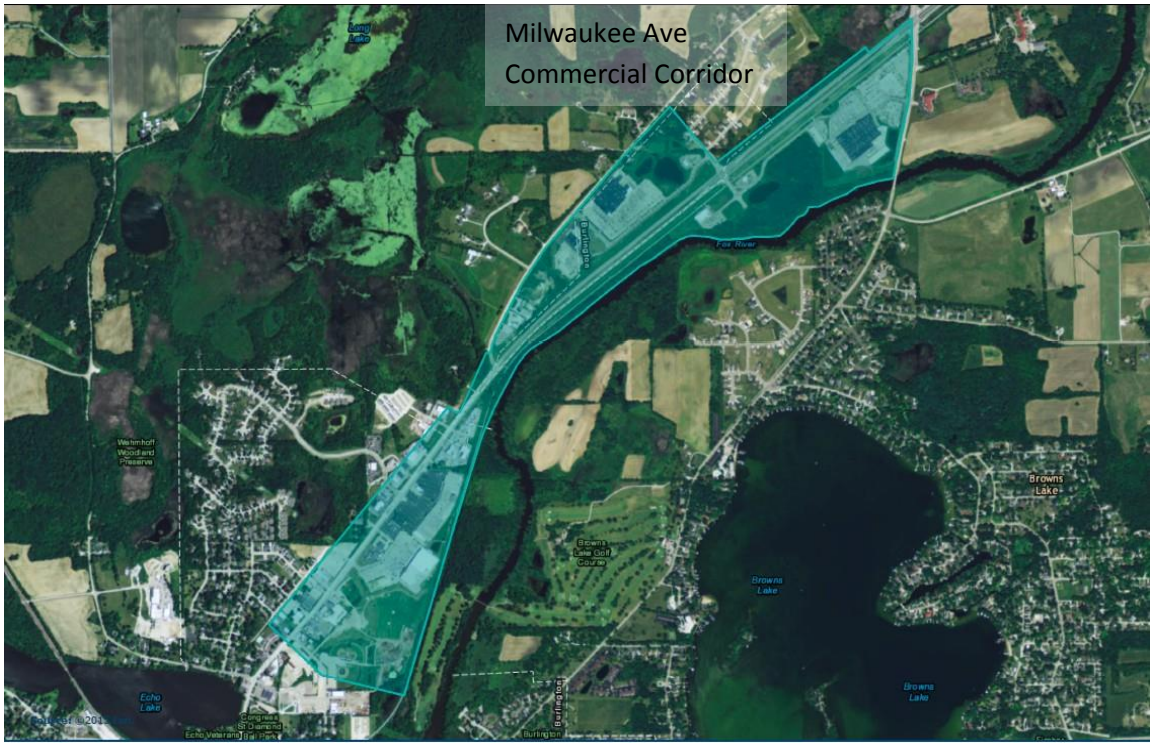


Exhibit 4: Population Summary

Year	0 -5 Minutes Drive Time	5-15 Minutes Drive Time
2000	9,918	32,826
2010	10,103	34,781
2015	10,107	34,868
2020	10,136	35,075
2015-2020 Annual Rate	0.06%	0.12%

Exhibit 5: Households Summary

	0-5 Minutes Drive Time	5-15 Minutes Drive Time
2000 Households	3,911	12,255
2000 Average Household Size	2.48	2.65
2010 Households	4,106	13,585
2010 Average Household Size	2.42	2.54
2015 Households	4,150	13,785
2015 Average Household Size	2.40	2.51
2020 Households	4,176	13,914
2020 Average Household Size	2.39	2.50
2015-2020 Annual Rate	0.12%	0.19%

Exhibit 6: Age Cohort

2015 Population by Age

	0 -5 Minutes Drive Time	5-15 Minutes Drive Time
Total	10,107	34,868
Age 0-4	5.90%	5.10%
Age 5-9	6.20%	5.80%
Age 10-14	6.70%	6.80%
Age 15-24	13.50%	12.60%
Age 25-34	12.60%	11.20%
Age 35-44	12.00%	11.80%
Age 45-54	14.40%	16.20%
Age 55-64	13.50%	15.00%
Age 65-74	8.20%	9.10%
Age 75-84	4.70%	4.40%
Age 85+	2.40%	1.90%

2020 Population by Age

	0 -5 Minutes Drive Time	5-15 Minutes Drive Time
Total	10,137	35,076
Age 0-4	5.90%	5.00%
Age 5-9	5.90%	5.50%
Age 10-14	6.40%	6.40%
Age 15-24	12.30%	11.40%
Age 25-34	14.10%	12.00%
Age 35-44	12.30%	13.80%
Age 45-54	14.40%	16.20%
Age 55-64	13.90%	15.70%
Age 65-74	9.70%	11.00%
Age 75-84	4.70%	5.00%
Age 85+	2.30%	2.00%

Median Age

Year	0-5 Minutes Drive Time	5-15 Minutes Drive Time
2010	38.5	41.1
2015	39.1	42.3
2020	39.4	42.9

Exhibit 7: Race/ Ethnicity

	0-5 Minutes Drive Time	5-15 Minutes Drive Time
Total	10,108	34,868
White Alone	91.7%	95.0%
Black Alone	0.9%	0.5%
American Indian Alone	0.5%	0.4%
Asian Alone	1.3%	0.9%
Pacific Islander Alone	0.0%	0.0%
Some Other Race Alone	3.8%	1.9%
Two or More Races	1.8%	1.3%
Hispanic Origin	10.0%	5.7%
Diversity Index	31.0	19.3

Exhibit 8: Income

	0 -5 Minutes Drive Time	5-15 Minutes Drive Time
2015 Household Income Base	4,150	13,785
<$15,000	10.90%	8.10%
$15,000 - $24,999	12.60%	9.10%
$25,000 - $34,999	8.90%	8.60%
$35,000 - $49,999	13.30%	13.00%
$50,000 - $74,999	18.00%	19.50%
$75,000 - $99,999	15.70%	16.40%
$100,000 - $149,999	14.90%	17.40%
$150,000 - $199,999	2.90%	4.00%
$200,000+	2.70%	4.00%

Median Household Income

Year	0-5 Minutes Drive Time	5-15 Minutes Drive Time
2015	$54,292	$61,938
2020	$63,193	$75,325

Per Capita Income

Year	0-5 Minutes Drive Time	5-15 Minutes Drive Time
2015	$27,585	$30,667
2020	$31,946	$35,562

Exhibit 9: Educational Attainment

2015 Population 25+	0-5 Minutes Drive Time	5-15 Minutes Drive Time
Total	6,840	24,293
Less than 9th Grade	2.0%	2.3%
9th - 12th Grade, No Diploma	5.3%	5.8%
High School Graduate	29.4%	32.7%
GED/Alternative Credential	4.3%	3.4%
Some College, No Degree	27.4%	23.1%
Associate Degree	11.8%	10.1%
Bachelor's Degree	13.1%	15.5%
Graduate/Professional Degree	6.8%	7.0%

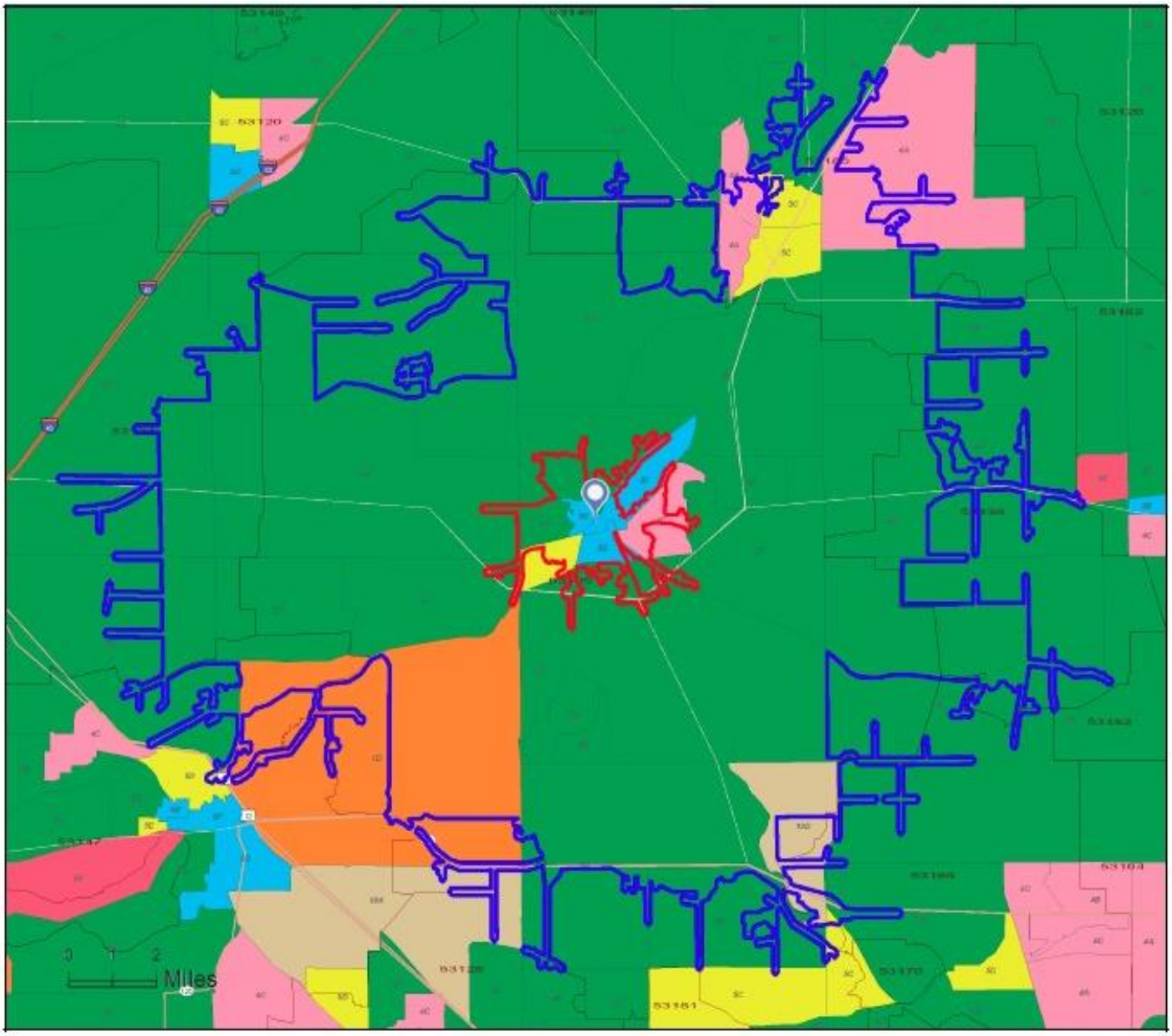
Exhibit 10: Housing Tenure

	0-5 Minutes Drive Time	5-15 Minutes Drive Time
2000 Housing Units	4,187	13,261
Owner Occupied Housing Units	57.7%	69.0%
Renter Occupied Housing Units	35.7%	23.4%
Vacant Housing Units	6.6%	7.6%
2010 Housing Units	4,500	14,972
Owner Occupied Housing Units	55.0%	67.1%
Renter Occupied Housing Units	36.3%	23.6%
Vacant Housing Units	8.8%	9.3%
2015 Housing Units	4,537	15,147
Owner Occupied Housing Units	53.2%	65.7%
Renter Occupied Housing Units	38.3%	25.3%
Vacant Housing Units	8.5%	9.0%
2020 Housing Units	4,578	15,286
Owner Occupied Housing Units	53.2%	65.7%
Renter Occupied Housing Units	38.0%	25.3%
Vacant Housing Units	8.8%	9.0%

Median Home Value

Year	0-5 Minutes Drive Time	5-15 Minutes Drive Time
2015	$186,629	$198,794
2020	$224,915	$241,766

Exhibit 11: Dominant Tapestry Map



Tapestry LifeMode

- L1: Affluent Estates
- L2: Upscale Avenues
- L3: Uptown Individuals
- L4: Family Landscapes
- L5: GenXurban
- L6: Cozy Country
- L7: Ethnic Enclaves
- L8: Middle Ground
- L9: Senior Styles
- L10: Rustic Outposts
- L11: Midtown Singles
- L12: Hometown
- L13: Next Wave
- L14: Scholars and Patriots

Source: Esri

LifeMode Group: Middle Ground

Front Porches

8E

Households: 1,910,000

Average Household Size: 2.55

Median Age: 34.2

Median Household Income: $39,000

WHO ARE WE?

Front Porches blends household types, with more young families with children or single households than average. This group is also more diverse than the US. Half of householders are renters, and many of the homes are older town homes or duplexes. Friends and family are central to *Front Porches* residents and help to influence household buying decisions. Residents enjoy their automobiles and like cars that are fun to drive. Income and net worth are well below the US average, and many families have taken out loans to make ends meet.

OUR NEIGHBORHOOD

- Nearly one in five homes is a duplex, triplex, or quad; half are older single-family dwellings.
- Just over half the homes are occupied by renters.
- Older, established neighborhoods; three quarters of all homes were built before 1980.
- Single-parent families or singles living alone make up almost half of the households.

SOCIOECONOMIC TRAITS

- Composed of a blue-collar work force with a strong labor force participation rate, but unemployment is high at 11%.
- Price is more important than brand names or style to these consumers.
- With limited incomes, these are not adventurous shoppers.
- They would rather cook a meal at home than dine out.
- They seek adventure and strive to have fun.

TAPESTRY™ SEGMENTATION
esri.com/tapestry

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

8E

LifeMode Group: Middle Ground

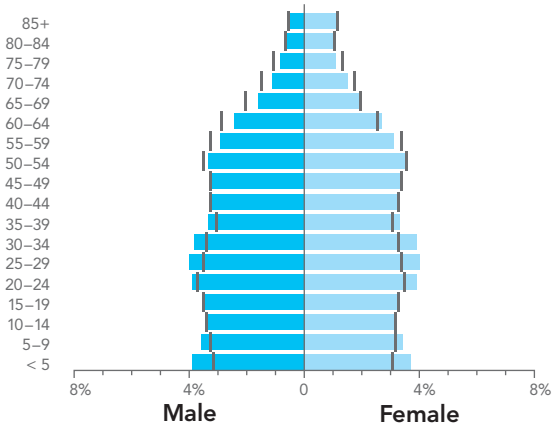
Front Porches

TAPESTRY SEGMENTATION
esri.com/tapestry

AGE BY SEX (Esri data)

Median Age: 34.2 US: 37.6

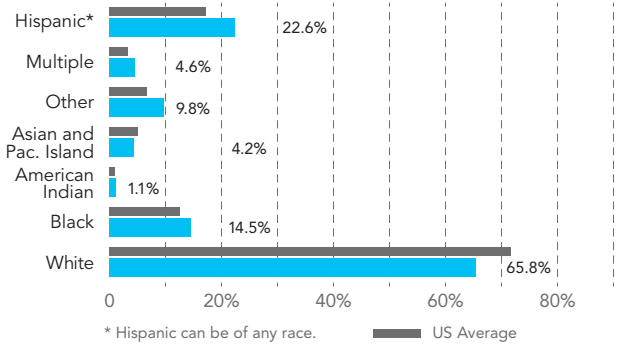
Indicates US



RACE AND ETHNICITY (Esri data)

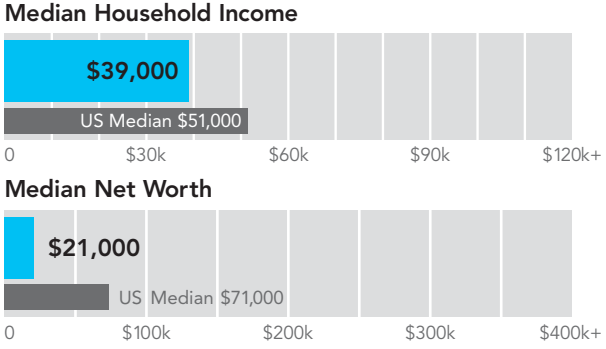
The Diversity Index summarizes racial and ethnic diversity. The index shows the likelihood that two persons, chosen at random from the same area, belong to different race or ethnic groups. The index ranges from 0 (no diversity) to 100 (complete diversity).

Diversity Index: 70.4 US: 62.1



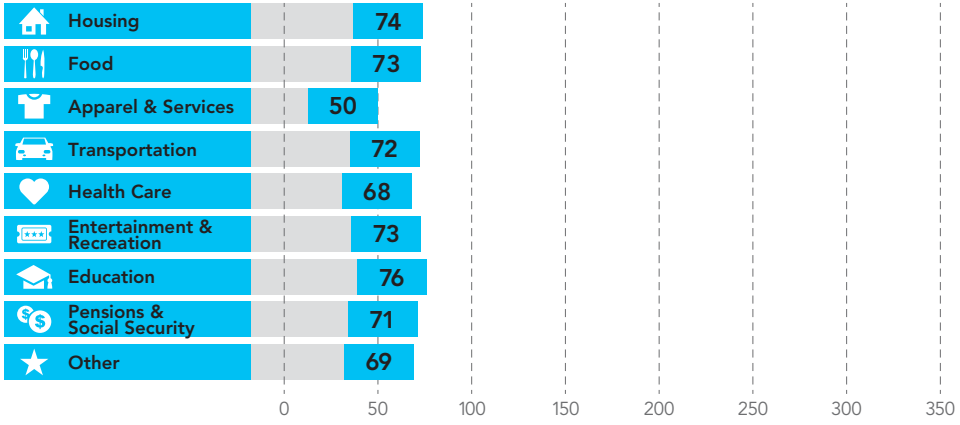
INCOME AND NET WORTH

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



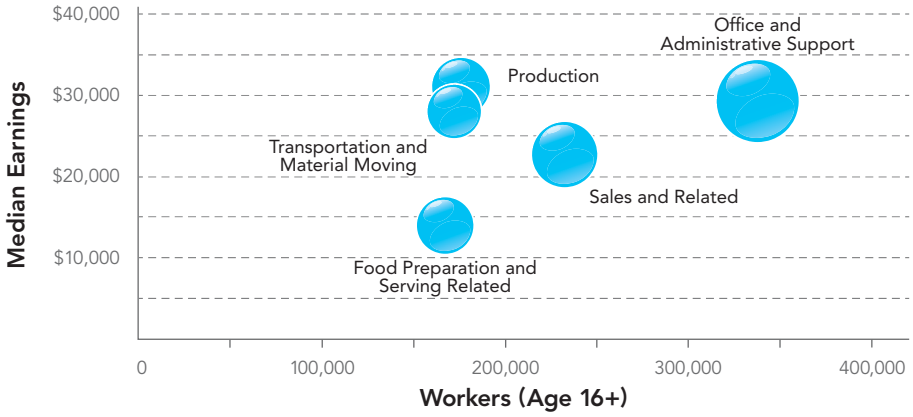
AVERAGE HOUSEHOLD BUDGET INDEX

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



OCCUPATION BY EARNINGS

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



8E LifeMode Group: Middle Ground
Front Porches

TAPESTRY SEGMENTATION
esri.com/tapestry

MARKET PROFILE (Consumer preferences are estimated from data by GfK MRI)

- Go online for gaming, online dating, and chat rooms.
- Use their cell phones to redeem mobile coupons and listen to hip hop and R&B music.
- Drink energy and sports drinks.
- Participate in leisure activities including sports, indoor water parks, bingo, and video games.
- Watch Comedy Central, Nickelodeon, and PBS Kids Sprout.

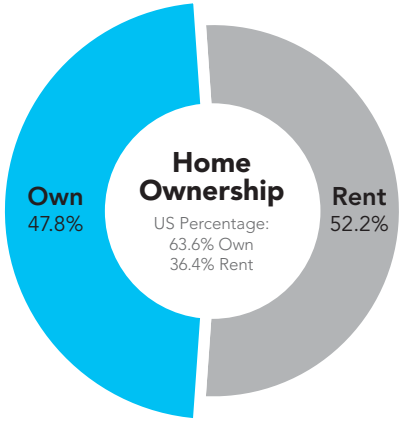
HOUSING

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

Typical Housing:
Single Family; Multiunits

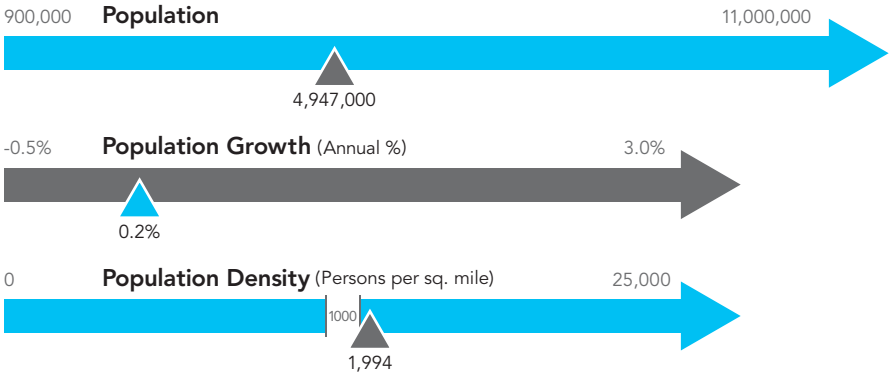
Average Rent:
$890

US Average: $990



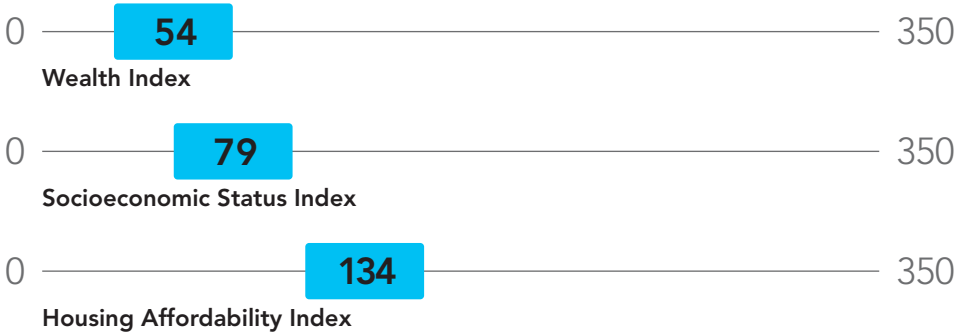
POPULATION CHARACTERISTICS

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



ESRI INDEXES

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



LifeMode Group: Cozy Country Living

Green Acres

6A

Households: 3,794,000

Average Household Size: 2.69

Median Age: 43.0

Median Household Income: $72,000

WHO ARE WE?

The *Green Acres* lifestyle features country living and self-reliance. They are avid do-it-yourselfers, maintaining and remodeling their homes, with all the necessary power tools to accomplish the jobs. Gardening, especially growing vegetables, is also a priority, again with the right tools, tillers, tractors, and riding mowers. Outdoor living also features a variety of sports: hunting and fishing, motorcycling, hiking and camping, and even golf. Self-described conservatives, residents of *Green Acres* remain pessimistic about the near future yet are heavily invested in it.

OUR NEIGHBORHOOD

- Rural enclaves in metropolitan areas, primarily (not exclusively) older homes with acreage; new housing growth in the past 10 years.
- Single-family, owner-occupied housing, with a median value of $197,000.
- An older market, primarily married couples, most with no children.

SOCIOECONOMIC TRAITS

- Education: 60% are college educated.
- Unemployment is low at 6% (Index 70); labor force participation rate is high at 67.4% (Index 108).
- Income is derived not only from wages and salaries but also from self-employment (more than 15% of households), investments (30% of households), and increasingly, from retirement.
- They are cautious consumers with a focus on quality and durability.
- Comfortable with technology, more as a tool than a trend: banking or paying bills online is convenient; but the Internet is not viewed as entertainment.
- Economic outlook is professed as pessimistic, but consumers are comfortable with debt, primarily as home and auto loans, and investments.

TAPESTRY™ SEGMENTATION
esri.com/tapestry

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

6A

LifeMode Group: Cozy Country Living

Green Acres

TAPESTRY SEGMENTATION
esri.com/tapestry

AGE BY SEX (Esri data)

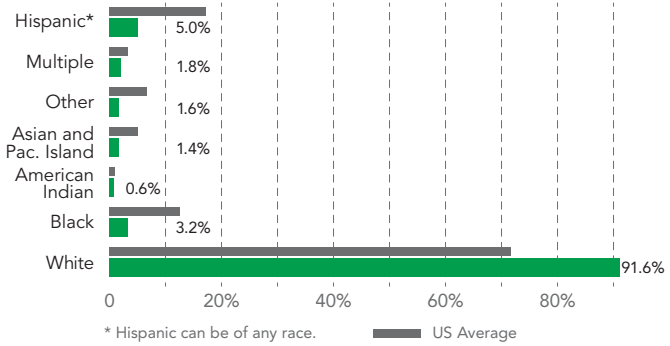
Median Age: 43.0 US: 37.6

Indicates US

RACE AND ETHNICITY (Esri data)

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

Diversity Index: 24.0 US: 62.1



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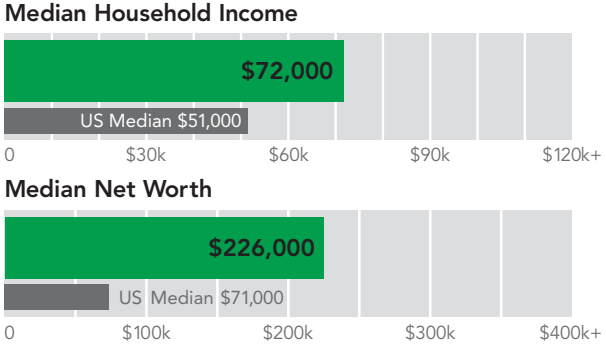

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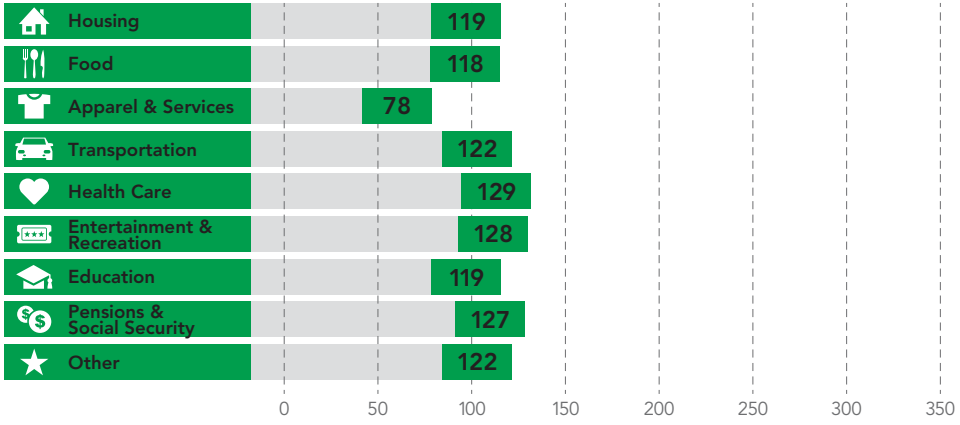

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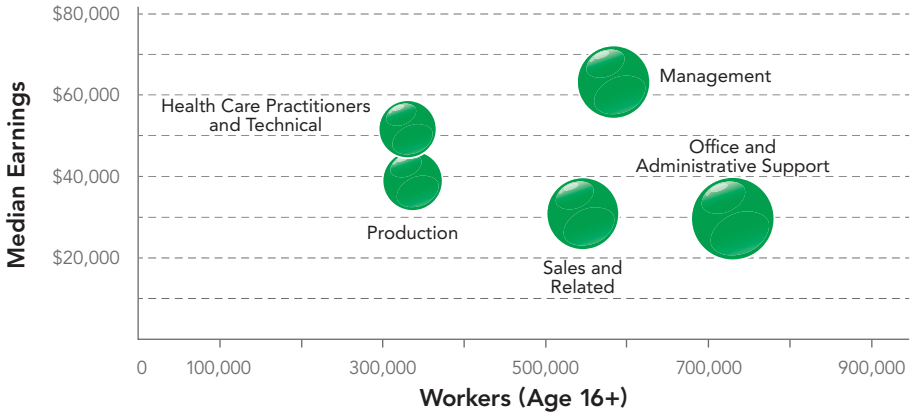


6A

LifeMode Group: Cozy Country Living

Green Acres

TAPESTRY SEGMENTATION
esri.com/tapestry

MARKET PROFILE (Consumer preferences are estimated from data by GfK MRI)

- Purchasing choices reflect *Green Acres'* residents country life, including a variety of vehicles from trucks and SUVs to ATVs and motorcycles, preferably late model.
- Homeowners favor DIY home improvement projects and gardening.
- Media of choice are provided by satellite service, radio, and television, also with an emphasis on country and home and garden.
- *Green Acres* residents pursue physical fitness vigorously, from working out on home exercise equipment to playing a variety of sports.
- Residents are active in their communities and a variety of social organizations, from fraternal orders to veterans' clubs.

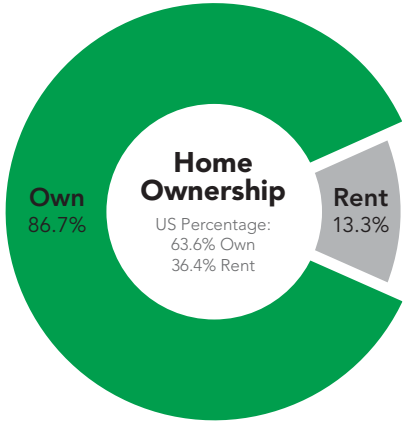
HOUSING

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

Typical Housing:
Single Family

Median Value:
$197,000

US Median: $177,000



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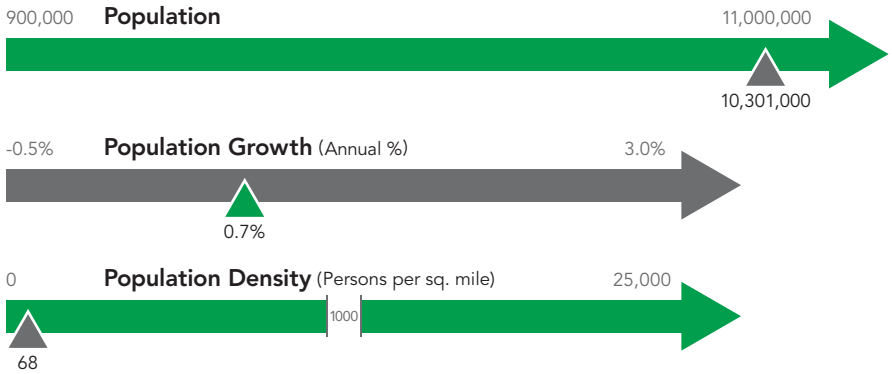

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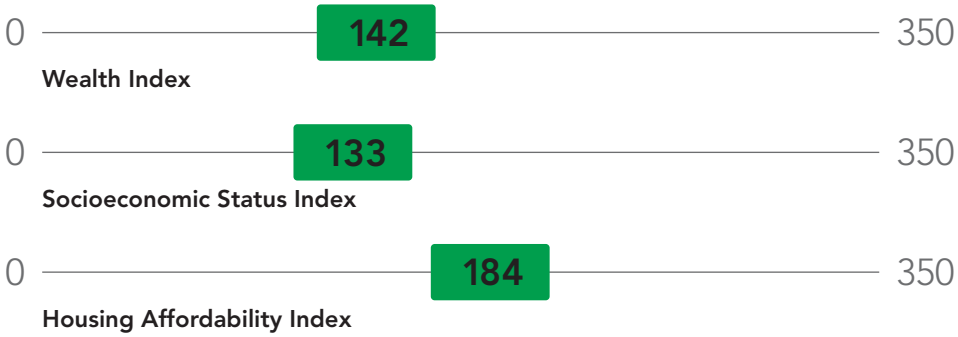


LifeMode Group: Family Landscapes

Middleburg

4C

Households: 3,319,000

Average Household Size: 2.73

Median Age: 35.3

Median Household Income: $55,000

WHO ARE WE?

Middleburg neighborhoods transformed from the easy pace of country living to semirural subdivisions in the last decade, when the housing boom reached out. Residents are conservative, family-oriented consumers. Still more country than rock and roll, they are thrifty but willing to carry some debt and are already investing in their futures. They rely on their smartphones and mobile devices to stay in touch and pride themselves on their expertise. They prefer to buy American and travel in the US. This market is younger but growing in size and assets.

OUR NEIGHBORHOOD

- Semirural locales within metropolitan areas.
- Neighborhoods changed rapidly in the previous decade with the addition of new single-family homes.
- Include a number of mobile homes (Index 152).
- Affordable housing, median value of $158,000 (Index 89) with a low vacancy rate.
- Young couples, many with children; average household size is 2.73.

SOCIOECONOMIC TRAITS

- Education: 66% with a high school diploma or some college.
- Unemployment rate lower at 7.4% (Index 85).
- Labor force participation typical of a younger population at 66.7% (Index 106).
- Traditional values are the norm here—faith, country, and family.
- Prefer to buy American and for a good price.
- Comfortable with the latest in technology, for convenience (online banking or saving money on landlines) and entertainment.

TAPESTRY SEGMENTATION
esri.com/tapestry

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

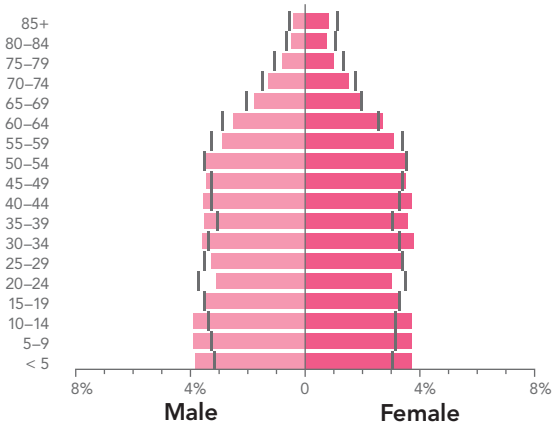
4C LifeMode Group: Family Landscapes
Middleburg

TAPESTRY SEGMENTATION
esri.com/tapestry

AGE BY SEX (Esri data)

Median Age: 35.3 US: 37.6

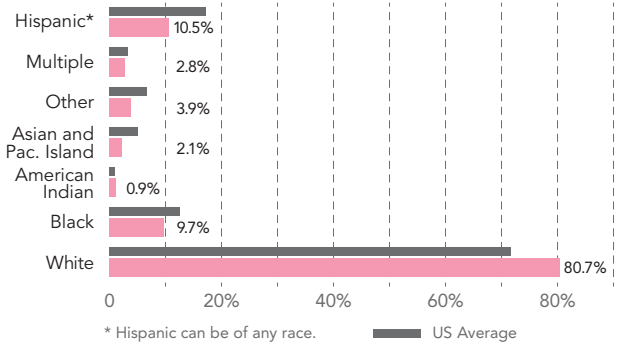
Indicates US



RACE AND ETHNICITY (Esri data)

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

Diversity Index: 46.3 US: 62.1



INCOME AND NET WORTH

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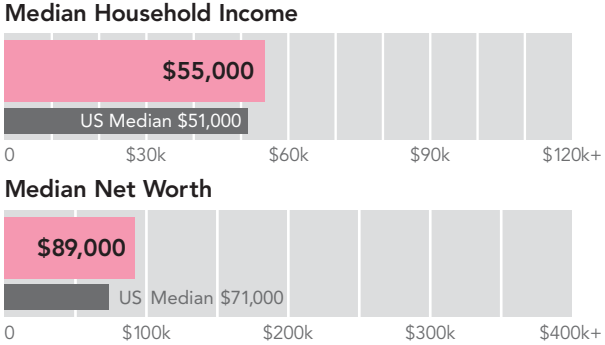

AVERAGE HOUSEHOLD BUDGET INDEX

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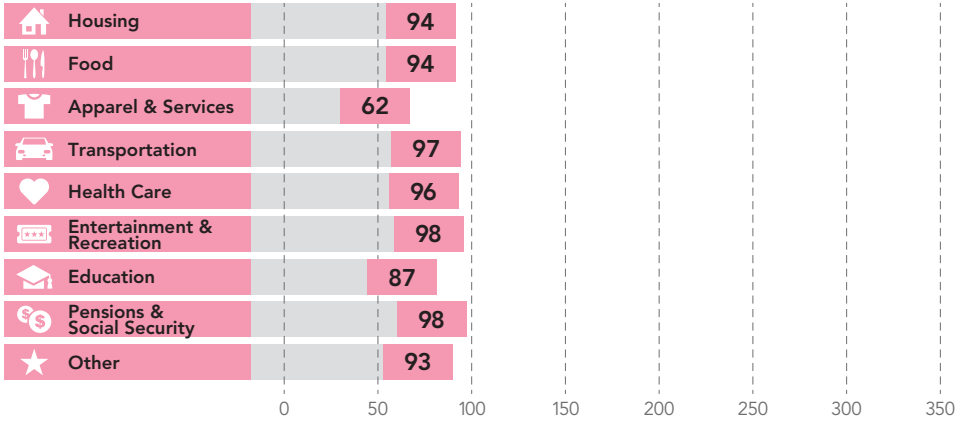

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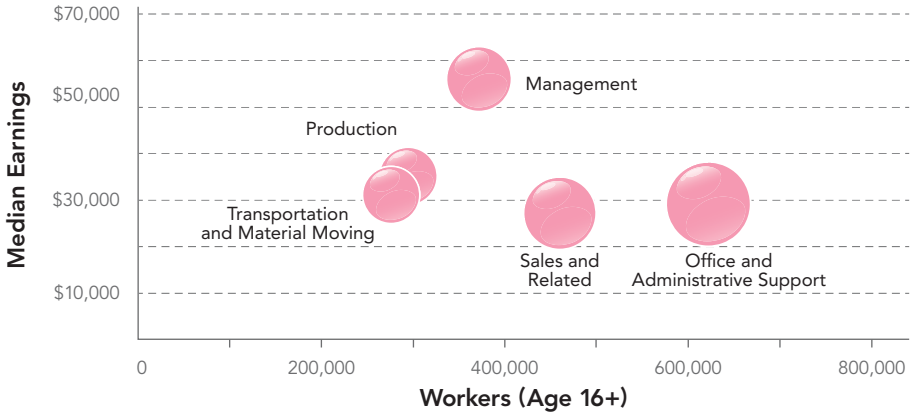
The five occupations with the highest number of workers in the market are displayed by median earnings. Data from the Census Bureau's American Community Survey.



4C LifeMode Group: Family Landscapes
Middleburg

TAPESTRY SEGMENTATION
esri.com/tapestry

MARKET PROFILE (Consumer preferences are estimated from data by GfK MRI)

- Residents are partial to trucks, SUVs, and occasionally, convertibles, or motorcycles.
- Entertainment is primarily family-oriented, TV and movie rentals or theme parks and family restaurants.
- Spending priorities also focus on family (children's toys and apparel) or home DIY projects.
- Sports include hunting, target shooting, bowling, and baseball.
- TV and magazines provide entertainment and information.
- Media preferences include country and Christian channels.

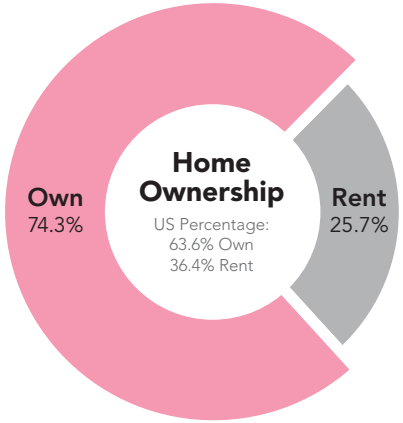
HOUSING

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

Typical Housing:
Single Family

Median Value:
$158,000

US Median: $177,000



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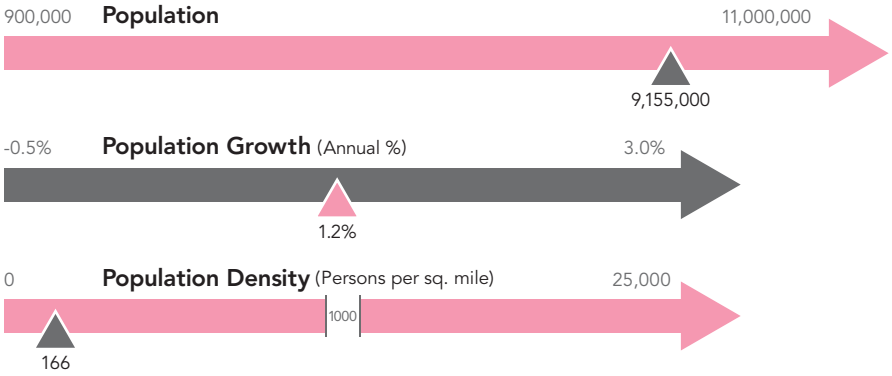

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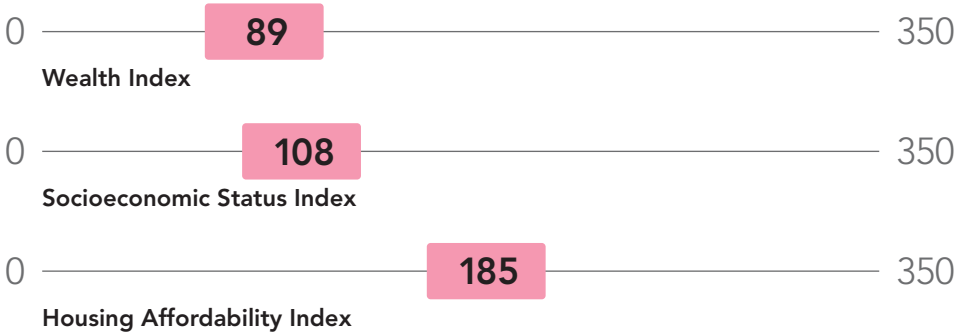


LifeMode Group: Middle Ground

Old and Newcomers

8F

Households: 2,774,000

Average Household Size: 2.11

Median Age: 38.5

Median Household Income: $39,000

WHO ARE WE?

This market features singles' lifestyles, on a budget. The focus is more on convenience than consumerism, economy over acquisition. *Old and Newcomers* is composed of neighborhoods in transition, populated by renters who are just beginning their careers or retiring. Some are still in college; some are taking adult education classes. They support environmental causes and Starbucks. Age is not always obvious from their choices.

OUR NEIGHBORHOOD

- Metropolitan city dwellers.
- Predominantly single households (Index 148), with a mix of married couples (no children); average household size lower at 2.11.
- 54% renter occupied; average rent, $800 (Index 88).
- 45% of housing units are single-family dwellings; 44% are multiunit buildings in older neighborhoods, built before 1980.
- Average vacancy rate at 11%.

SOCIOECONOMIC TRAITS

- Unemployment is lower at 7.8% (Index 91), with an average labor force participation rate of 62.6%, despite the increasing number of retired workers.
- 30% of households are currently receiving Social Security.
- 28% have a college degree (Index 99), 33% have some college education, 10% are still enrolled in college (Index 126).
- Consumers are price aware and coupon clippers, but open to impulse buys.
- They are attentive to environmental concerns.
- They are more comfortable with the latest technology than buying a car.

TAPESTRY SEGMENTATION
esri.com/tapestry

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

8F

LifeMode Group: Middle Ground

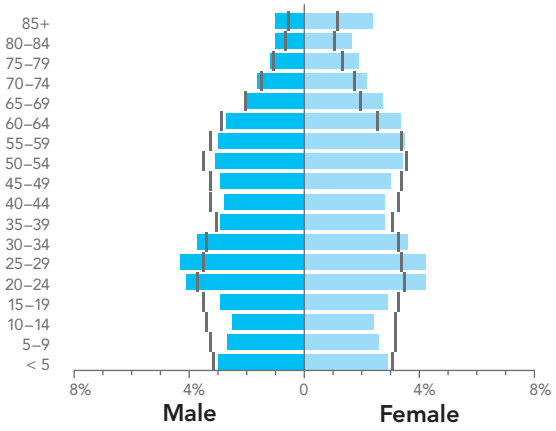
Old and Newcomers

TAPESTRY SEGMENTATION
esri.com/tapestry

AGE BY SEX (Esri data)

Median Age: 38.5 US: 37.6

Indicates US



RACE AND ETHNICITY (Esri data)

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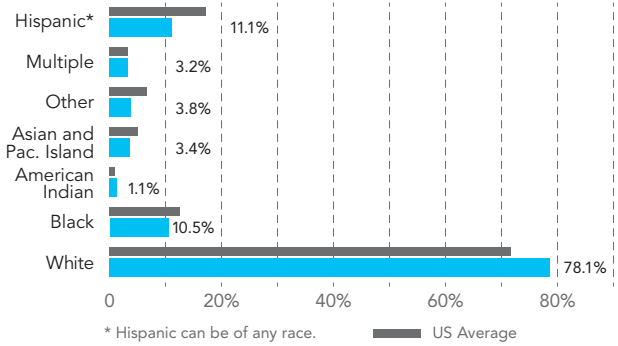
Diversity Index: 50.1 US: 62.1



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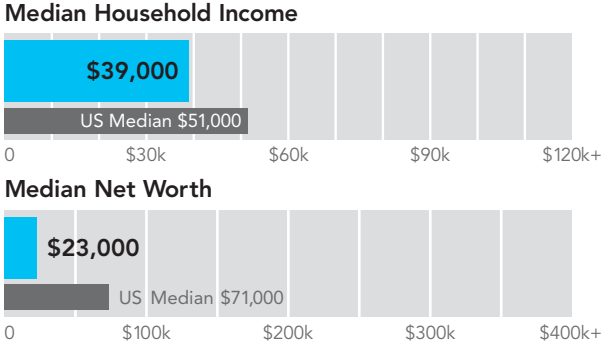

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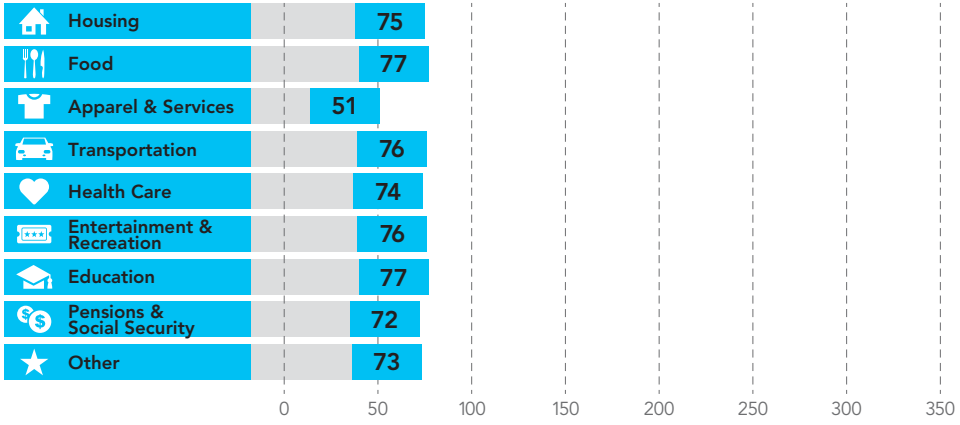

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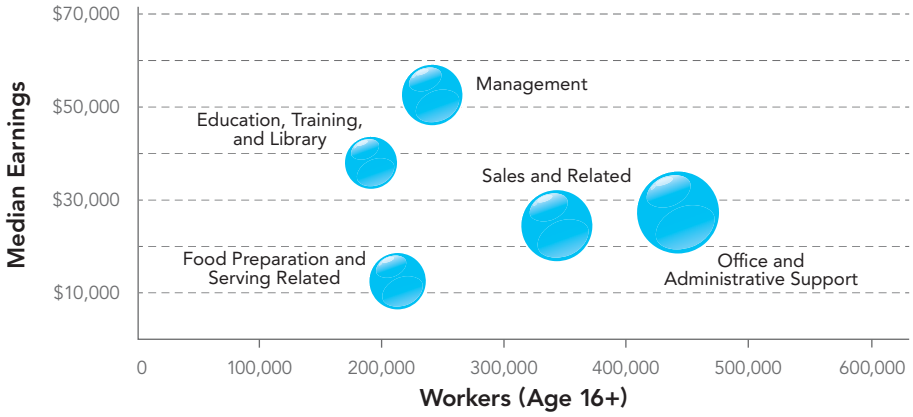


8F

LifeMode Group: Middle Ground

Old and Newcomers

TAPESTRY SEGMENTATION
esri.com/tapestry

MARKET PROFILE (Consumer preferences are estimated from data by GfK MRI)

- Residents are strong supporters of environmental organizations.
- They prefer cell phones to landlines.
- Entertainment features the Internet (dating sites and games), movies at home, country music, and newspapers.
- Vehicles are basically just a means of transportation.
- Food features convenience, frozen and fast food.
- They do banking as likely in person as online.

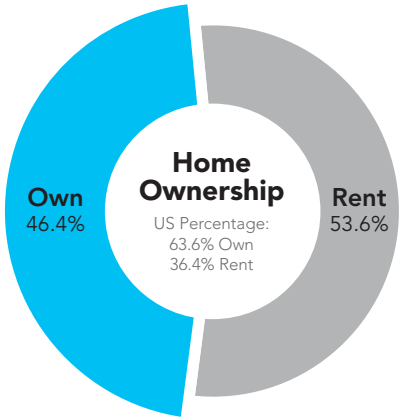
HOUSING

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

Typical Housing:
Single Family; Multiunits

Average Rent:
$850

US Average: $990



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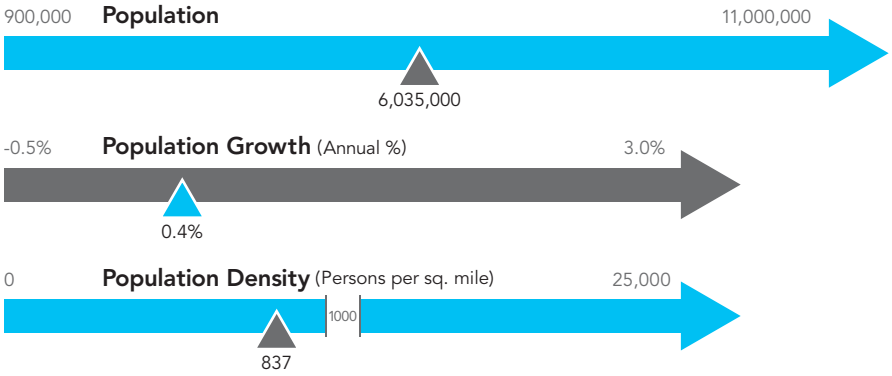

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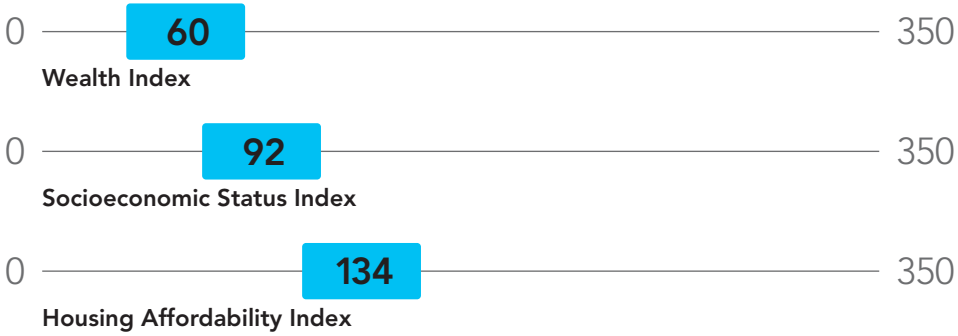


LifeMode Group: GenXurban

Parks and Rec

5C

Households: 2,411,000

Average Household Size: 2.49

Median Age: 40.3

Median Household Income: $55,000

WHO ARE WE?

These practical suburbanites have achieved the dream of home ownership. They have purchased homes that are within their means. Their homes are older, and town homes and duplexes are not uncommon. Many of these families are two-income married couples approaching retirement age; they are comfortable in their jobs and their homes, budget wisely, but do not plan on retiring anytime soon or moving. Neighborhoods are well established, as are the amenities and programs that supported their now independent children through school and college. The appeal of these kid-friendly neighborhoods is now attracting a new generation of young couples.

OUR NEIGHBORHOOD

- Homes are primarily owner occupied, single-family residences built prior to 1970; town homes and duplexes are scattered through the neighborhoods.
- Both median home value and average rent are close to the national level.
- Households by type mirror the US distribution; married couples, more without children, dominate. Average household size is slightly lower at 2.49, but this market is also a bit older.

SOCIOECONOMIC TRAITS

- More than half of the population is college educated.
- Older residents draw Social Security and retirement income.
- The work force is diverse: professionals in health care, retail trade, and education, or skilled workers in manufacturing and construction.
- This is a financially shrewd market; consumers are careful to research their big-ticket purchases.
- When planning trips, they search for discounted airline fares and hotels and choose to vacation within the US.
- These practical residents tend to use their cell phones for calls and texting only.

TAPESTRY SEGMENTATION
esri.com/tapestry

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

5C

LifeMode Group: GenXurban

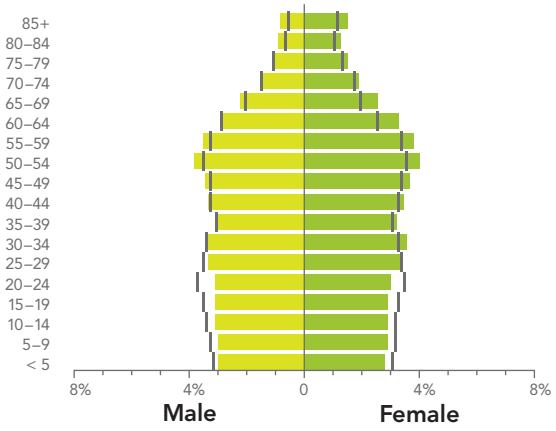
Parks and Rec

TAPESTRY SEGMENTATION
esri.com/tapestry

AGE BY SEX (Esri data)

Median Age: 40.3 US: 37.6

Indicates US



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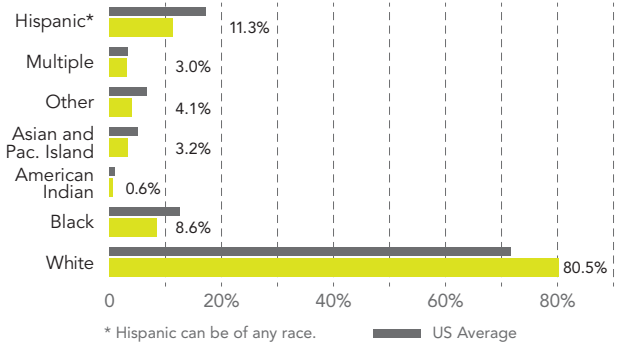

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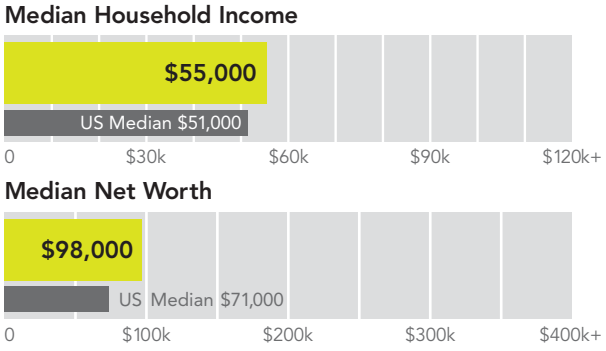

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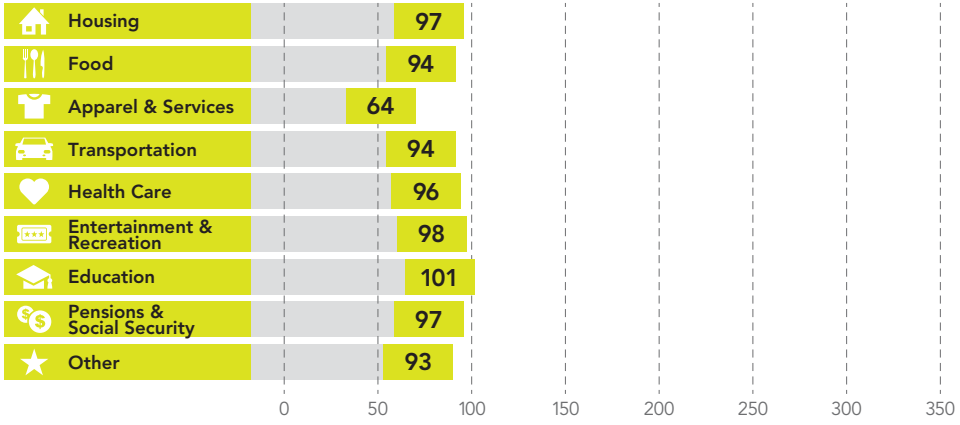

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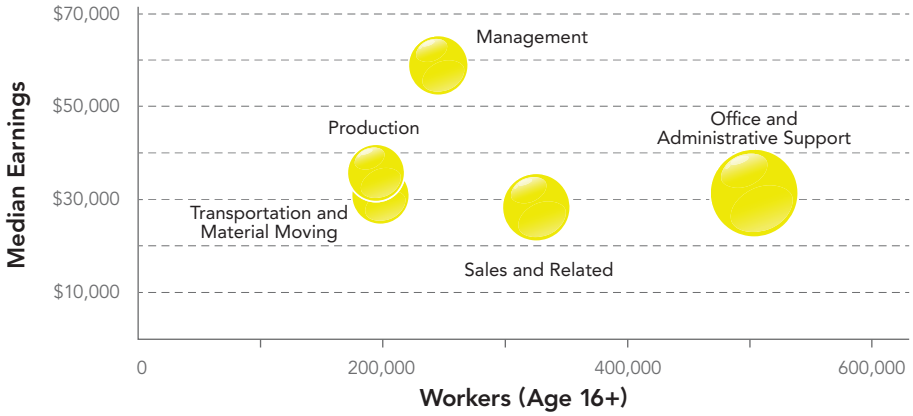


5C

LifeMode Group: GenXurban

Parks and Rec

TAPESTRY SEGMENTATION
esri.com/tapestry

MARKET PROFILE (Consumer preferences are estimated from data by GfK MRI)

- Cost and practicality come first when purchasing a vehicle; *Parks and Rec* residents are more likely to buy domestic SUVs or trucks over compact or subcompact vehicles.
- Budget-conscious consumers stock up on staples at warehouse clubs.
- Pass time at home watching documentaries on Animal Planet, Discovery, or History channels. For an outing, they choose to dine out at family-style restaurants and attend movies. Between trips to the casinos, they gamble on lottery tickets and practice their blackjack and poker skills online.
- Convenience is important in the kitchen; they regularly use frozen or packaged main course meals. Ground coffee is preferred over coffee beans.
- Residents here take advantage of local parks and recreational activities. Their exercise routine is a balance of home-based exercise; a session at their local community gym; or a quick jog, swim, or run.

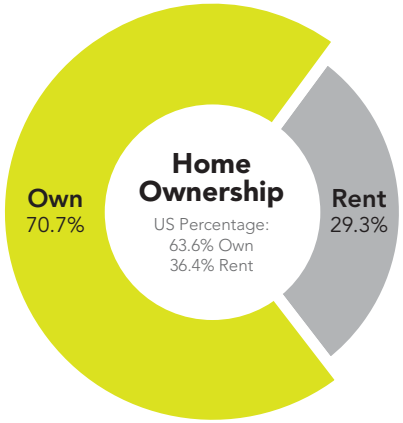
HOUSING

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

Typical Housing:
Single Family

Median Value:
$180,000

US Median: $177,000



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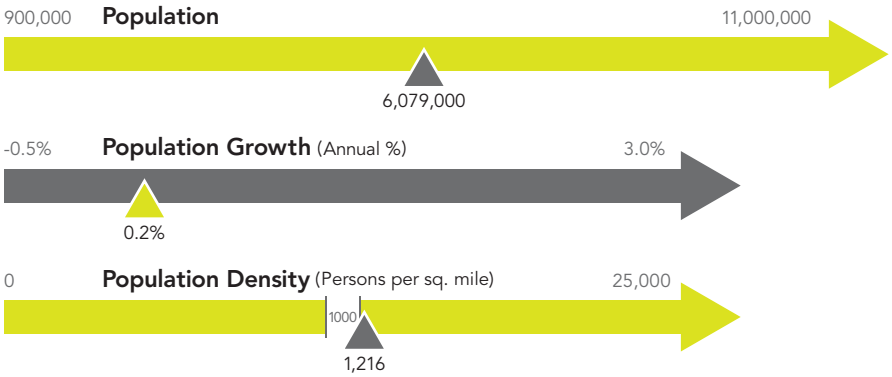

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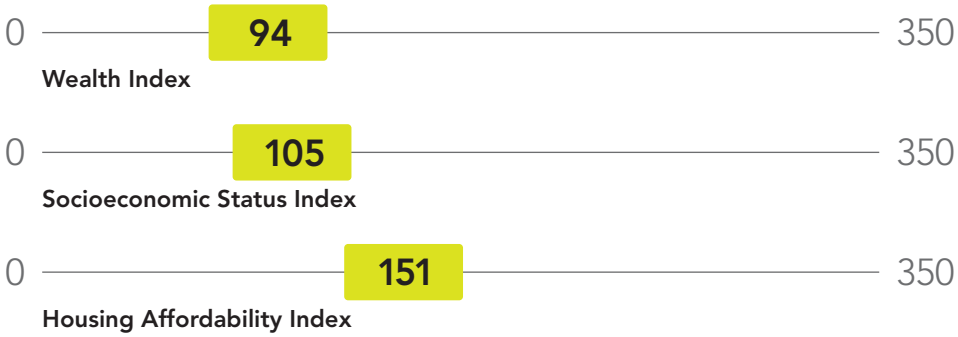

LifeMode Group: Cozy Country Living

Salt of the Earth

6B

Households: 3,517,000

Average Household Size: 2.58

Median Age: 43.1

Median Household Income: $53,000

WHO ARE WE?

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

OUR NEIGHBORHOOD

- This large segment is concentrated in the Midwest, particularly in Ohio, Pennsylvania, and Indiana.
- Due to their rural setting, households own two vehicles to cover their long commutes, often across county boundaries.
- Home ownership rates are very high (Index 132). Single-family homes are affordable, valued at 25 percent less than the national market.
- Two in three households are composed of married couples; less than half have children at home.

SOCIOECONOMIC TRAITS

- Steady employment in construction, manufacturing, and related service industries.
- Completed education: 42% with a high school diploma only.
- Household income just over the national median, while net worth is double the national median.
- Spending time with family their top priority.
- Cost-conscious consumers, loyal to brands they like, with a focus on buying American.
- Last to buy the latest and greatest products.
- Try to eat healthy, tracking the nutrition and ingredients in the food they purchase.

TAPESTRY SEGMENTATION
esri.com/tapestry

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

6B

LifeMode Group: Cozy Country Living

Salt of the Earth

TAPESTRY SEGMENTATION
esri.com/tapestry

AGE BY SEX (Esri data)

Median Age: 43.1 US: 37.6

Indicates US

RACE AND ETHNICITY (Esri data)

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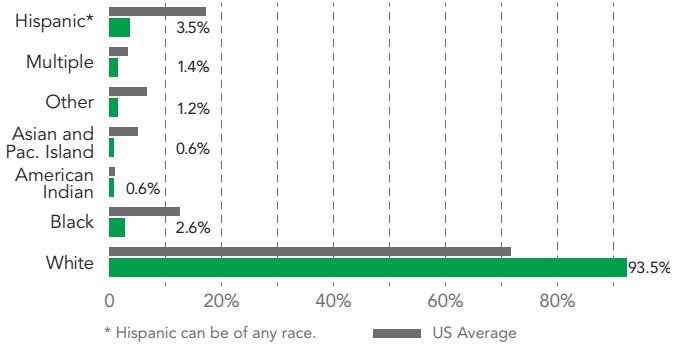

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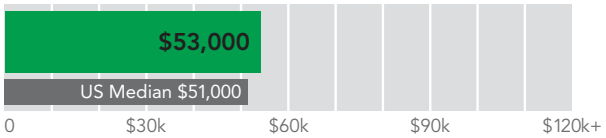
Median Household Income



Median Net Worth

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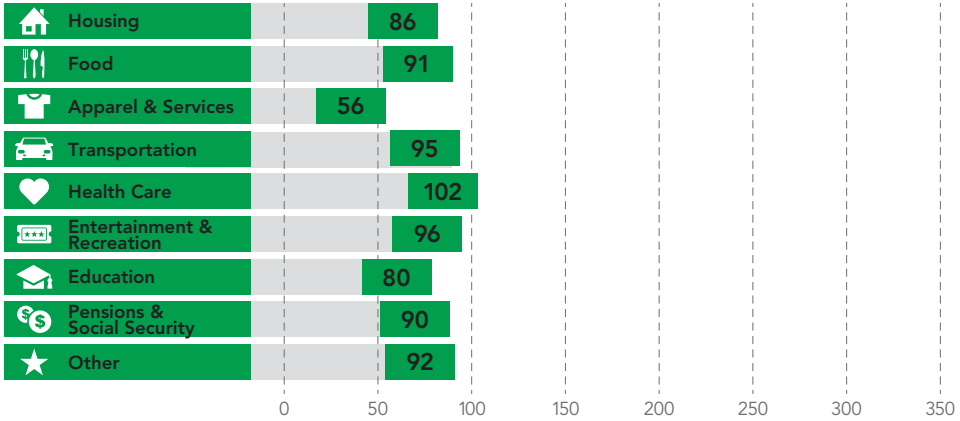

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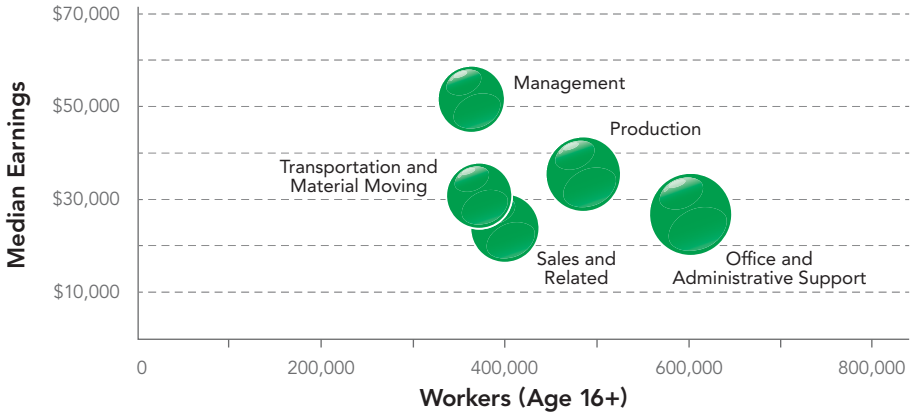


6B

LifeMode Group: Cozy Country Living

Salt of the Earth

TAPESTRY SEGMENTATION
esri.com/tapestry

MARKET PROFILE (Consumer preferences are estimated from data by GfK MRI)

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

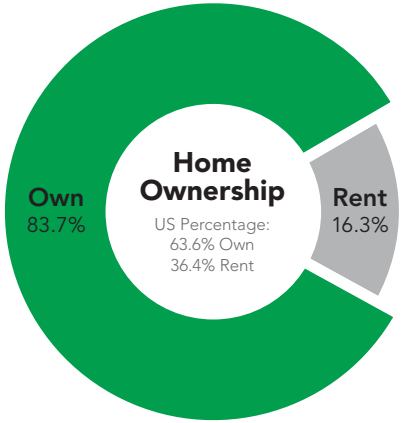
HOUSING

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

Typical Housing:
Single Family

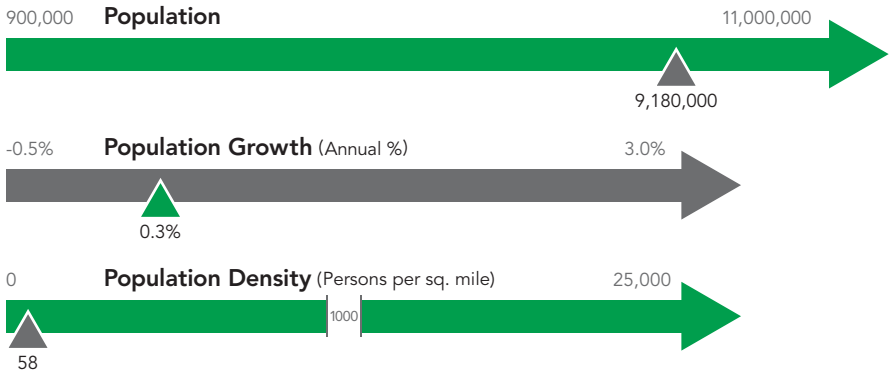
Median Value:
$134,000

US Median: $177,000



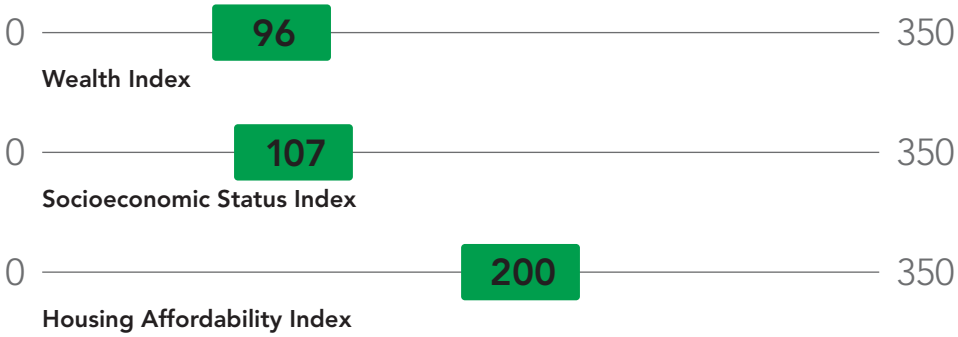
POPULATION CHARACTERISTICS

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



ESRI INDEXES

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



LifeMode Group: Family Landscapes

Soccer Moms

4A

Households: 3,327,000

Average Household Size: 2.96

Median Age: 36.6

Median Household Income: $84,000

WHO ARE WE?

Soccer Moms is an affluent, family-oriented market with a country flavor. Residents are partial to new housing away from the bustle of the city but close enough to commute to professional job centers. Life in this suburban wilderness offsets the hectic pace of two working parents with growing children. They favor time-saving devices, like banking online or housekeeping services, and family-oriented pursuits.

OUR NEIGHBORHOOD

- *Soccer Moms* residents prefer the suburban periphery of metropolitan areas.
- Predominantly single family, homes are in newer neighborhoods, 36% built in the 1990s (Index 253), 31% built since 2000.
- Owner-occupied homes have high rate of mortgages at 74% (Index 163), and low rate vacancy at 5%.
- Median home value is $226,000.
- Most households are married couples with children; average household size is 2.96.
- Most households have 2 or 3 vehicles; long travel time to work including a disproportionate number commuting from a different county (Index 133).

SOCIOECONOMIC TRAITS

- Education: 37.7% college graduates; more than 70% with some college education.
- Low unemployment at 5.9%; high labor force participation rate at 72%; 2 out of 3 households include 2+ workers (Index 124).
- Connected, with a host of wireless devices from iPods to tablets—anything that enables convenience, like banking, paying bills, or even shopping online.
- Well insured and invested in a range of funds, from savings accounts or bonds to stocks.
- Carry a higher level of debt, including first (Index 159) and second mortgages (Index 154) and auto loans (Index 151).

TAPESTRY SEGMENTATION
esri.com/tapestry

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

4A

LifeMode Group: Family Landscapes

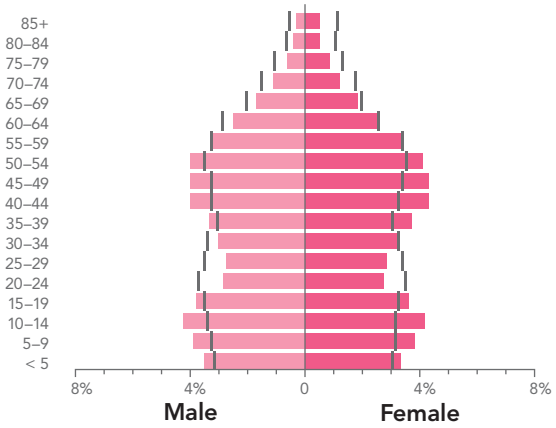
Soccer Moms

TAPESTRY SEGMENTATION
esri.com/tapestry

AGE BY SEX (Esri data)

Median Age: 36.6 US: 37.6

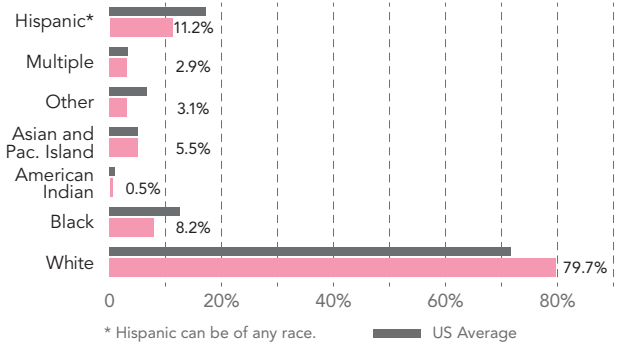
Indicates US



RACE AND ETHNICITY (Esri data)

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

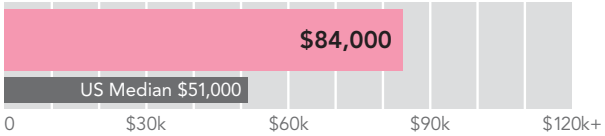
Diversity Index: 48.3 US: 62.1



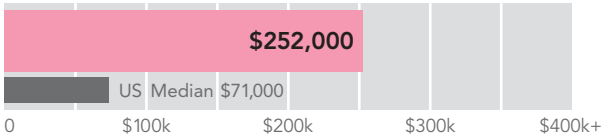
INCOME AND NET WORTH

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

Median Household Income

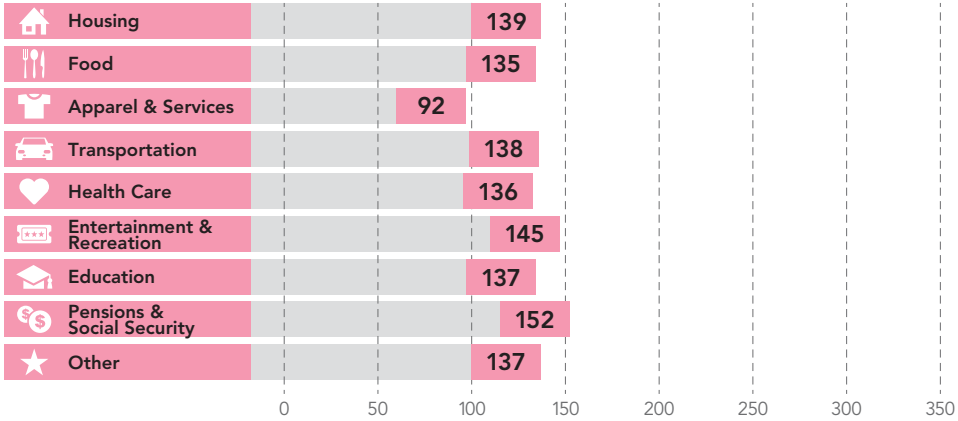


Median Net Worth



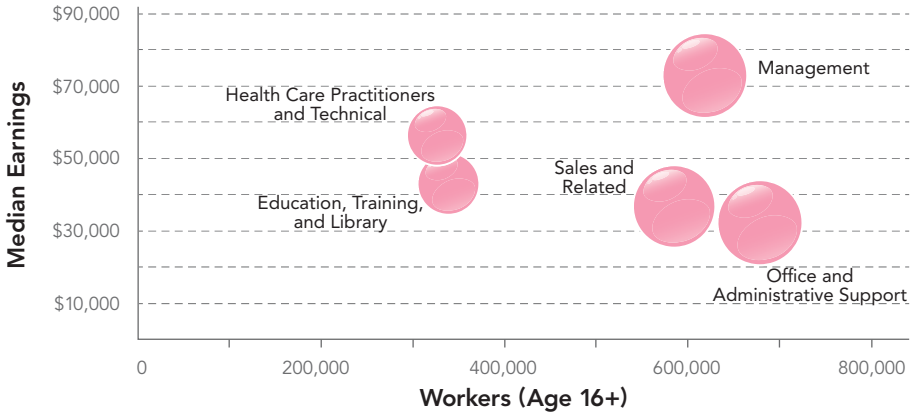
AVERAGE HOUSEHOLD BUDGET INDEX

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



OCCUPATION BY EARNINGS

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



4A

LifeMode Group: Family Landscapes

Soccer Moms

TAPESTRY SEGMENTATION
esri.com/tapestry

MARKET PROFILE (Consumer preferences are estimated from data by GfK MRI)

- Most households own at least 2 vehicles; the most popular types are minivans and SUVs.
- Family-oriented purchases and activities dominate, like 4+ televisions (Index 165), movie purchases or rentals, children's apparel and toys, and visits to theme parks or zoos.
- Outdoor activities and sports are characteristic of life in the suburban periphery, like bicycling, jogging, golfing, boating, and target shooting.
- Home maintenance services are frequently contracted, but these families also like their gardens and own the tools for minor upkeep, like riding mowers and tillers.

HOUSING

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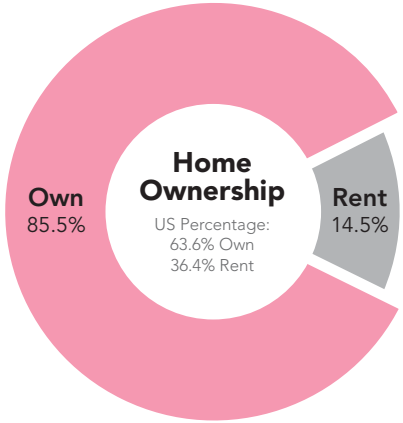

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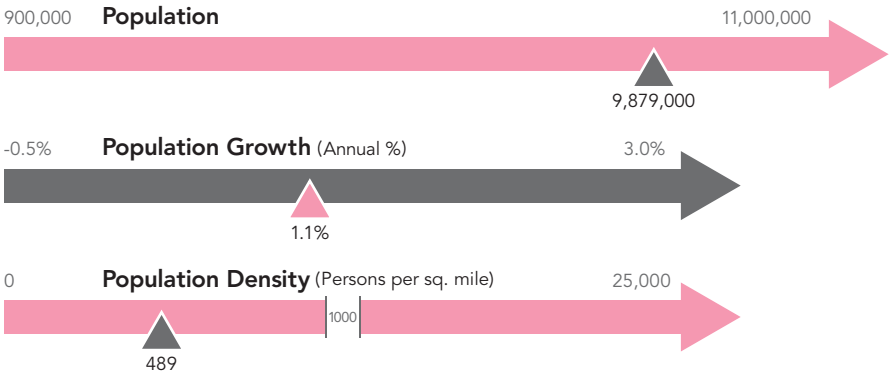

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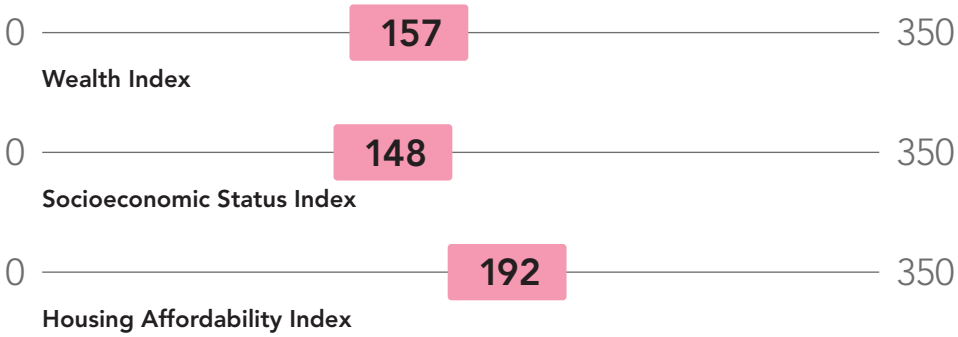


Exhibit 12: Employment by Industry

	0 -5 Minutes Drive Time	5-15 Minutes Drive Time
Agriculture/Mining	0.80%	1.90%
Construction	7.90%	8.00%
Manufacturing	23.40%	20.60%
Wholesale Trade	1.40%	1.70%
Retail Trade	12.10%	12.50%
Transportation/Utilities	5.70%	5.30%
Information	1.40%	1.10%
Finance/Insurance/Real Estate	5.80%	5.00%
Services	40.10%	40.90%
Public Administration	1.50%	2.80%

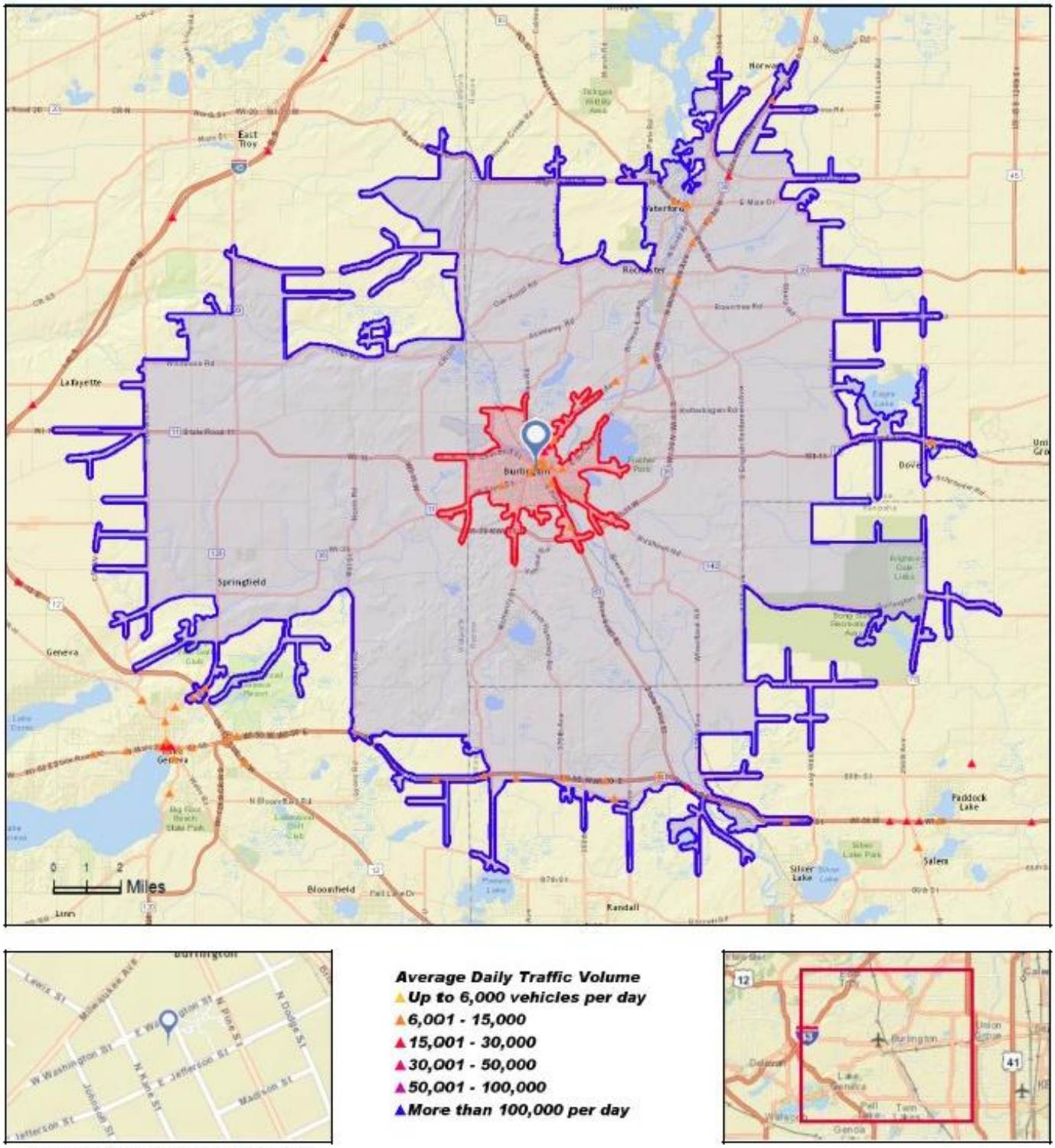
Employment by Occupation

	0 -5 Minutes Drive Time	5-15 Minutes Drive Time
White Collar	55.70%	54.50%
Blue Collar	27.20%	28.80%
Total	5,016	18,404

Exhibit 13: Labor force Composition

	0 -5 Minutes Drive Time	5-15 Minutes Drive Time
Employed	89.60%	92.50%
Unemployed	10.40%	7.50%

Exhibit 14: Traffic Volume Map



Source: ©2015 Market Planning Solutions, Inc.

Exhibit 15: Responses from the Burlington survey (Q1 to Q8)

Q1: Age

Answer Choices	Responses
20 years of age or under	27.24%
21 - 55 years of age	60.47%
56 years of age or older	12.29%
Total Respondents:	**1,017**

Q2: Check as many as apply:

Answer Choices	Responses
I live in the Burlington area	92.00%
I work in the Burlington area	42.94%
I utilize Burlington as my commerce hub	36.43%
Total Respondents:	**1,013**

Q3: In the next 5 years, what types of core services should Burlington expand upon? Please select your TOP 5.

Answer Choices	Responses
Childcare (i.e. preschools, daycare, etc.)	10.84%
Education (i.e. keeping facilities current, tech schools, four-year schools, etc.)	57.04%
Entertainment (i.e. live music, live shows, etc.)	53.89%
Large Retail (i.e. Barnes and Noble, Target, TJ Maxx, Michaels, etc.)	58.03%
Medical (i.e. specialty services, etc.)	24.24%
Professional Services (i.e. insurance agency, dentist offices, orthodontics, counseling, etc.)	12.22%
Recreation (i.e. bike lanes, river launches, mini-golf, upkeep of beaches, better signage, etc.)	69.56%
Restaurants (i.e. Buffalo Wild Wings, Dave and Busters, Olive Garden, etc.)	72.32%
Senior Centers	13.69%
Small Retail (i.e. craft stores, boutique, women's clothing, music shop, etc.)	41.38%
Other (i.e. public transportation, waterpark, convention center, youth sports complex, etc.)	46.60%
Total Respondents:	**1,015**

Q4: How important are the following items to you?

	Not Important	(no label)	Somewhat Important	(no label)	Very Important	Total	Weighted Average
Good Paying Local Jobs	1.18%	0.69%	10.62%	23.21%	64.31%	1,017	4.49
Historical Preservation	5.80%	9.34%	29.79%	27.04%	28.02%	1,017	3.62

Pedestrian Friendly	1.57%	3.73%	16.21%	33.50%	44.99%	1,018	4.17
Public Safety	0.98%	1.27%	7.45%	25.00%	65.29%	1,020	4.52
Traffic Flow	1.18%	3.16%	19.92%	33.93%	41.81%	1,014	4.12

Q5: Which types of future housing developments are most important to you?

	Not Important	(no label)	Somewhat Important	(no label)	Very Important	Total	Weighted Average
Apartments	32.30%	17.70%	27.67%	13.79%	8.54%	972	2.49
Condominiums	23.82%	19.73%	33.33%	16.36%	6.75%	978	2.62
Senior Living Centers	13.73%	14.95%	31.33%	25.33%	14.65%	983	3.12
Single Family Homes	5.21%	5.61%	19.04%	28.66%	41.48%	998	3.96

Q6: What services already exist in our community that you utilize? (i.e. What keeps you here in Burlington? What do you love about your community?)

- Small community, good private schools, grocery and department stores are in town
- Quad Graphics
- I like living in Burlington because of all of the things you can do here.
- Better than Milwaukee where I grew up
- The school system, old time atmosphere but still modern stores
- The safe feeling, and the downtown area
- The local little stores. Friendly people and safe environment
- The people, Burlington High school, the parks, Adrian's, Fred's, Town Friar, and Browns Lake
- Library, excellent school district.
- Lower costs will keep me here and investing my resources.
- Friendliness, accessibility, good Chamber of Commerce
- Work
- Retail convenience
- Senior shuttle, grocery stores
- Parks and Lakes
- I love the parks and the small town feel
- Quaint downtown, river, convenient shopping
- The local shops and coffee house
- Aurora health center, Montessori public school program, Theater
- Kohls, Pick N Save
- Downtown businesses, Grocery stores, Library

- Bank, Aldi, Pool, Hospital, Employers, Theater
- One on one shop owners who keep it real and give good service with great products.
- Parks, local businesses (Rinemans, Itzens, Catholic Churches, all grocery stores, etc.) we use the library, go to plays, basically we utilize social and public events and areas. It is nice that Burlington continues to offer more in our community: farmer's market, concerts in Echo, etc.
- Schools
- Riverwalk
- Quality housing, education and government
- Close to work
- Nice parks, Schools, Bike trail
- Youth sports, kids school
- Parks
- Love music in Echo Lake Park, the coffee shop, BJ Wenekers, would like to see another restaurant option, but NOT a chain or franchise!
- Wellness Center, Family, Coffee House
- Low key
- Mcdonalds
- Quaintness of downtown Burlington and little shops
- The history and convenience
- Church
- Small town feel
- Easy access to parks - for children and grandchildren.

Q7: What things would bring you to downtown Burlington?

- Better prices, more gift shops
- Good food
- The movie theater, Chocolate Fest, Echo Park, Adrian's.
- Sense of history
- Dunkin Doughnuts, Hobby Lobby, Olive Garden
- More entertainment and restaurant option.
- Movie theater
- A giant statue of Abe Lincoln's wife
- Star Bucks' or maybe retail store for clothes.
- Restaurant variety
- Value for products.
- Coffee shop, farmer's market, lunch bargains
- Better restaurants
- Shopping
- Entertainment
- Something other than just coffee and Fred's burgers
- Competitive prices
- Parking, less drive through traffic

- Small shops
- Shopping options & restaurants
- More variety of restaurants.
- More things on the river.
- Specialty shops, Art museum & Furniture store
- Entertainment and Restaurants
- Live music and available good clothing/farmers market.
- I think Burlington could learn from what Waukesha did - they really made their riverside a destination. It is beautiful and they have events including a really impressive farmers market.
- Barnes and Noble book store, More restaurants, More gift and specialty shops
- Downtown is too small and congested; add a year round competitive community pool; clean up litter around Walmart
- More up to date stores, Panera bread, Starbucks
- Activities and events; Downtown shops - not all insurance or whatnot, but unique retail. Love our local restaurants that are not chains.
- Entertainment/Live Music, Restaurants
- Business owners that stay open after 5pm, more retail downtown and less service oriented businesses
- A brew pub; another restaurant; independent bookstore
- Restaurants, family owned stores
- Dining, entertainment
- More dinner options (similar to BJ Wenekers), a wine bar.
- More clothing or home accessory
- Less empty shops
- Coffee House
- We need more chain restaurants and large retailers. Not another tattoo parlor or Pay Day loan place.
- More restaurants
- McDonald's
- Stores & restaurants we need: Peebles and Olive Gardens
- GameStop
- More business, easier access

Q8: How would you prefer to be informed of events taking place in your community? Please select your TOP 2.

Answer Choices	Responses
Bulletins	21.05%
City or Chamber Website	22.24%
Electronic Mailing List (e-mail)	44.89%
Facebook	48.56%
Hi-Liter	32.87%
Standard Press	35.15%
Twitter	11.82%
Other	8.44%

Total Respondents:	1007

Exhibit 16: Responses from the Business Meetings

Q1: Satisfaction with City and Other Services

Service	Total Respondents	Satisfied	Neutral	Unsatisfied	Comments
Snow Removal	30	53.33%	13.33%	33.33%	City should clean sidewalks; Snow removal happens little too slow; Hard for elderly and handicapped people to get around; parking lot behind the loop isn't kept clean; Snow piles on Milwaukee Ave and Pine St; Within 3 days all snow is cleaned up; Hard to walk over the snow that piles up on the curb.
Street Sweeping	30	43.33%	36.67%	20%	Look into gutters; Dirty Streets' Trash in Alley; Could sweep the corners in the bump outs, could be done more in fall, Majority of business owners in the loop keep the road clean.
Streetscape & Beautification	31	48.39%	25.81%	25.81%	Banners could be added; Likes Planters, pavers aren't in good shape, Brick Pavers have reached the end of their useful life, hard to walk on and shovel, fantastic, city should cut the grass by railroad tracks; new bike rack at Pine & Chestnut St. is awesome, trees roots are impacting sewer lines; street lights are showing their age, Decorations at the holiday are great. Trees in The Loop need to be replanted as the current ones are not healthy.
Wayfinding Signage	29	41.38%	34.48%	24.14%	Not enough signage pointing to "Downtown Shopping District"; Intersection of MKE & Chestnut is not safe, Too small and not enough; Need signage at both ends of the Loop to "Shop the Loop", People can't find the Chocolate Museum or the Yo Yo Museum.
Traffic Control	32	34.38%	15.62%	46.88%	Add a 4 way stop on MKE & Chestnut. Reduce speed on Pine; Pine and E. Chestnut is dangerous; Coming from the Loop cars can't go straight onto E. Chestnut and that isn't signed well enough, Delivery trucks in Pine St. alley block back entrance to business, Navigating around the median at Pine and Milwaukee is difficult. City should eliminate right turn from N. Pine onto Milwaukee; Milwaukee and Chestnut is hard to see around parked cars
Police	29	79.31%	13.79%	6.89%	Great response time. Helpful when a resident in an apartment behind the building turned into a bully, Should have officers on bicycles to patrol bikes on sidewalks.
Fire & Rescue	29	82.75%	17.24%	0%	Great response time, People complain about

					the big truck being driven around downtown for errands and the wear and tear on the truck and the streets, Remove fire lane from alley behind the W. Chestnut St. buildings b/c the City doesn't enforce it anyway. The placement seems arbitrary.
Permitting Process/ Enforcement of regulations	27	37.03%	44.44%	18.52%	City should tell new tenants/owners up front what the regulations are. City should offer a positive stance and tell business owners what they can do regarding their growth plans; not just tell us what we can't do. People think the private dumpster is public, Apartments near the tattoo place has huge piles of garbage up front on garbage day, and Approval from HPC could have been quicker. More streamlined, There is no one regulating on-street parking and people ignore the 2 hr. parking limits, Sign Permit and COA are difficult to understand and fill out.
Availability of Financial Assistance	18	55.55%	16.67%	27.78%	Used Façade Grant before, Wants more information about façade grant for paint and sign, The HPC is very nit-picky. The review process could have been simplified and more streamlined, Didn't know about either program; Will never use because of negative experience with HPC in the past.
Property Tax Assessment is Fair & Equitable	9	66.67%	22.22%	11.11%	No Comments
Other Comments	15				Need a group to monitor storefronts; Street parking in this area is not good; Don't shut off the Loop during special events. Renters put their garbage out on the street and sit outside and drink beer on the sidewalk. City should purchase cigarette bud receptacles; take away the zoning of buildings that aren't kept up and if they don't have their space leased up; Clean up shrubs in municipal parking lot off of Milwaukee Ave.; Hard for elderly and disabled to get around downtown; City needs to follow up and fine people that aren't taking care of their buildings. They need to threaten to have their occupancy permits pulled for inaction; Pave a drive way to provide a second access point to his building from Pine St. along the river behind the old Standard Press building; Security cameras are needed in the parking structure.

Q2 City Focus - Downtown

Downtown Burlington	Total Respondents	Comments
Strengths	23	Plenty of parking, Historic district look, Flower pots, Farmer's Mkt., ambiance, Christmas decorations, historic grants, BACC has a good newsletter, but it isn't enough, Walkable, Charming, Who you know gets you businesses, Easy access, Coffee House and Shy Violet are the only draws downtown on Sundays; The Health Food Store and Chase Bank are good draws; Bigger, quaint, doesn't feel "office parky"; Strong base of supporters, Customer service and loyalty, The new hospital is sure to boost all retail in the City; Community support; Mature client base that wants to shop in downtown; Good looking buildings; Wish it people would keep it looking historical without government intervention, Visibility is great, Historic character is a draw; Sustainable businesses are located in DT; Small town feel; Clean; Welcoming; Parks and Riverfront are great for the City; Close-knit community; Small town; and local shops.
Weaknesses	25	Old business owners and new business owners don't see eye to eye and don't work together much; Events that aren't BACC sponsored don't get enough marketing; Not a lot open on the weekends; Not customer-centric; Not a lot for shopping and restaurants, It is hard to get new business because people only work with who they know and they aren't open to getting to know others, Not enough retail to bring in the foot traffic; We aren't a destination for retail; Need more youth to come downtown; Need to keep the weeds down in the vacant City lot; People need to get on the same page; Shop owners don't work together; No cameras in the parking garage and damage are happening there so business owners choose not to park there; Not much has changed in downtown in 20 years; Business doesn't participate in new events; Storefronts can't make it with this electronic economy; Not a lot of retail; Too many service businesses; Deplorable conditions of the Coach's building, Changes to parking are needed; Too many vacant buildings, Not enough variety and less desirable businesses are coming to town.
Missing or could be enhanced	29	Put together a "Welcome to Downtown" info. Packet, Mentorship program, Restaurant week, Posters in empty buildings to advertise municipal assistance (Lake Geneva), Women's Weekend, City Alderman and Mayor should shop more downtown and attend more events downtown; Marketing can be done by high schools (small businesses aren't graphic designers and they can't afford to buy one); More retail and restaurants (healthy & fresh & locally sourced); Lunch specials; Shop local campaign; Convert residential to commercial spaces; Small shops, small businesses, Women's clothing, women businesses, antiques, Family-friendly events; Historical preservation is OK, but complacency about facades not being improved is not good to attract customers; More retail, productive storefronts, Store owners to post their hours and their contact information in their windows; Chic and Unique Furniture consignment; Artsy shops, health care providers, unique places to eat, Specialty store: butcher, wine/cheese; One time per year the City should pick a building or two to win a free rehab; Increased foot traffic; Coordinate master gardeners to maintain planters and beds in parking lots and parks, Attract stores like the old Barton's and Tobin's Drugs, Plant grass in the vacant city-owned lot by the parking garage, Parking on E. Chestnut street is atrocious; More tourists due to more events; Use the riverwalk as a draw to bring in families and events downtown; Anchor store (like the old Schuette Daniels Furniture Store); Craft brewery; More cafes trendy feeling with sidewalk seating); Foot traffic; Increase housing options in downtown (like the 3rd Ward in Milwaukee); and Niche stores like in Brookfield.

Exhibit 17: Business Locations

City of Burlington, United States
Drive Times: 5, 15 minute radii

Prepared by Esri
Latitude: 42.67835
Longitude: -88.27704

2010 Residential Population:	34,781
2015 Residential Population:	34,868
2020 Residential Population:	35,075
Annual Population Growth 2015 - 2020	0.12%

Code	Business Name	Franchise	Distance From Site in Miles	Employees	Sales
27110100	THE JOURNAL TIMES 125 E Washington St Burlington, WI 53105		0.01 NW	0.	$0.
72410000	BARBERS OFFICE 109 E Washington St Burlington, WI 53105		0.02 NW	3.	$70,000.
72310000	FOCUS HAIR & BODY CONCEPTS 109 E Washington St Burlington, WI 53105		0.02 NW	5.	$150,000.
65410000	FIDELITY TITLE INC 101 E Washington St Burlington, WI 53105		0.04 SW	6.	$272,727.
86610110	FIRST CHRCH OF NZRENE BRLNGNLG 100 E Jefferson St Burlington, WI 53105		0.04 SW	1.	$84,868.
82310304	BURLINGTON PUBLIC LIBRARY 166 E Jefferson St Burlington, WI 53105		0.05 NE	18.	$0.
84129902	BURLINGTON HISTORICAL SOCIETY MUSEUM 232 N Perkins Blvd Burlington, WI 53105		0.05 SE	12.	$420,000.
76920000	KK PRECISION WELDING INC 225 N Perkins Blvd Burlington, WI 53105		0.06 SE	1.	$96,000.
81110000	PITMAN, KYLE, & SICULA S.C. 100 E Washington St Burlington, WI 53105		0.06 NW	0.	$93,333.
99992222	IVORUM 301 N Kane St Burlington, WI 53105		0.07 SW	0.	$0.
86410100	TEMPLE MASONIC 325 N Kane St Burlington, WI 53105		0.07 SW	3.	$150,000.
81119901	TODD A TERRY 432 Milwaukee Ave Burlington, WI 53105		0.08 NW	2.	$100,000.
58120000	FLIPPY'S FAST FOOD 401 N Pine St Burlington, WI 53105		0.08 NE	2.	$86,000.
72310000	RAW SALON CO LLC 336 N Pine St Burlington, WI 53105		0.08 NE	3.	$110,000.

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Business Locations

City of Burlington, United States
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Latitude: 42.67835
Longitude: -88.27704

Code	Business Name	Franchise	Distance From Site in Miles	Employees	Sales
79110203	MISS NITCHKA'S STUDIO ONE 344 N Pine St Burlington, WI 53105		0.08 NE	3.	$78,000.
79110000	CREATIVE ENERGY IRON HOUSE GYM 326 N Pine St Burlington, WI 53105		0.08 NE	1.	$33,000.
73630103	ADECCO STAFFING 185 E Chestnut St Burlington, WI 53105		0.08 NE	1.	$537,083.
73499902	KLEAN KEEPERS 185 E Chestnut St Burlington, WI 53105		0.08 NE	75.	$1,600,000.
86999904	JOHN & DOROTHY ZWEIBEL TRUST 400 Milwaukee Ave Burlington, WI 53105		0.09 NW	2.	$3,863.
58120000	CASEYS SUPPER CLUB 217 N Pine St Burlington, WI 53105		0.09 SE	0.	$0.
99992222	GIA BELLA FLOWERS AND GIFTS 133 E Chestnut St Burlington, WI 53105		0.09 NW	0.	$0.
51999907	DELIGHTS 133 E Chestnut St Ste A Burlington, WI 53105		0.09 NW	1.	$20,000.
27590603	STITCH SHOPPE 133 E Chestnut St Ste B Burlington, WI 53105		0.09 NW	1.	$58,000.
53310000	BARGAINS & MORE INC 133 E Chestnut St Burlington, WI 53105		0.09 NW	2.	$84,000.
87210000	RICHARD A VANHOESEN CPA 133 E Chestnut St Burlington, WI 53105		0.09 NW	1.	$60,000.
72319902	HEAD-QUARTERS 161 E Chestnut St Burlington, WI 53105		0.09 NE	1.	$32,000.
31310502	KIKI AT HEAD QUARTERS 161 E Chestnut St Burlington, WI 53105		0.09 NE	1.	$50,000.
58120000	CAPTAIN D'S 356 N Pine St Burlington, WI 53105	58128066	0.09 NE	5.	$360,000.
59440000	IDE FINE JEWELRY 348 N Pine St Burlington, WI 53105		0.09 NE	6.	$320,000.
87210101	KEVIN P SCHUERMAN CPA 372 N Pine St Burlington, WI 53105		0.10 NE	2.	$160,000.

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72510104	ITZIN'S SHOES & REPAIR 436 N Pine St Burlington, WI 53105		0.10 NE	1.	$48,000.
59470104	WRAPSODY GIFT GALLERY 125 W Jefferson St Burlington, WI 53105		0.10 SW	1.	$43,000.
83510000	SYNCHRONICITY LEARNING CENTER 380 N Pine St Burlington, WI 53105		0.10 NE	5.	$110,000.
59320200	SHY VIOLET ANTIQUES & COLLECTIBLES LLC 129 E Chestnut St Burlington, WI 53105		0.10 NW	1.	$54,000.
59329904	CHIC & UNIQUE 173 E Chestnut St Burlington, WI 53105		0.10 NE	2.	$59,000.
55419901	WESTERN UNION 416 Milwaukee Ave Burlington, WI 53105	87428005	0.10 NW	5.	$440,000.
75499903	DAVE SCHILLI 416 Milwaukee Ave Burlington, WI 53105		0.10 NW	2.	$86,000.
72990105	BEACHES TANNING SALON 452 N Pine St Burlington, WI 53105		0.10 NE	1.	$35,000.
59490206	THREAD & THIMBLE 439 Milwaukee Ave Ste 11 Burlington, WI 53105		0.10 NW	1.	$36,000.
87210101	C/O EDWARDS GROUP CPAS 441 Milwaukee Ave Burlington, WI 53105		0.10 NW	1.	$61,000.
72310102	ELECTROLYSIS BY DARLENE 441 Milwaukee Ave Burlington, WI 53105		0.10 NW	1.	$32,000.
83220801	ADVANCED SOLUTIONS COUNSELING 441 Milwaukee Ave Burlington, WI 53105		0.10 NW	2.	$87,000.
80939902	PROFESSIONAL PSYCHOLOGICAL SERVICES 441 Milwaukee Ave 2 Burlington, WI 53105		0.10 NW	6.	$220,000.
86410000	BURLINGTON STUDENT LOAN FOUNDATION 441 Milwaukee Ave Burlington, WI 53105		0.10 NW	3.	$4,399.
63110000	DAVID JACK NORTHWESTERN MUTUAL 429 Milwaukee Ave Burlington, WI 53105		0.10 NW	2.	$150,000.
51940102	CIG CITY LLC 248 N Pine St Burlington, WI 53105		0.10 SE	3.	$260,000.

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92230000	DIVISION COMMUNITY CORRECTIONS 425 Milwaukee Ave Ste 5 Burlington, WI 53105		0.10 NW	1.	$0.
73891800	TAYLORED IMAGE HAIR DESIGN 425 Milwaukee Ave Burlington, WI 53105		0.10 NW	1.	$51,000.
72310000	HAIR WORKS INC 425 Milwaukee Ave Ste 1 Burlington, WI 53105		0.10 NW	14.	$410,000.
56110000	BURLINGTON MENS WEAR 113 E Chestnut St Burlington, WI 53105		0.10 NW	2.	$175,000.
86119902	BURLINGTON AREA CHAMBER OF COMMERCE 113 E Chestnut St Ste B Burlington, WI 53105		0.10 NW	2.	$298,187.
86610000	PLYMOUTH CONGREGATIONAL UNITED 124 W Washington St Burlington, WI 53105		0.10 NW	7.	$290,000.
52510000	TRUE VALUE 417 Milwaukee Ave Burlington, WI 53105	52518006	0.10 NW	60.	$6,500,000.
63519902	AID ASSOC FOR LUTHERANS 400 N Pine St Burlington, WI 53105	64118021	0.10 NE	4.	$300,000.
59450100	BEADS BUTTONS BAUB 201 N Pine St Burlington, WI 53105		0.11 SE	1.	$37,000.
80690101	AGAPE RECOVERY CENTER 201 N Pine St Burlington, WI 53105		0.11 SE	5.	$230,000.
52110000	THE COUNTRY HOME CENTER 408 N Pine St Burlington, WI 53105		0.11 NE	2.	$150,000.
87130000	B W SURVEYING 412 N Pine St Burlington, WI 53105		0.11 NE	2.	$120,000.
57340000	KTR COMPUTERS LLC 208 E Washington St Burlington, WI 53105		0.11 NE	2.	$94,000.
86610109	FIRST CHURCH OF CHRIST SCIENTIST & 133 W Jefferson St Burlington, WI 53105		0.11 SW	2.	$97,000.
54990102	BURLINGTON HEALTH FOODS 165 E Chestnut St Burlington, WI 53105		0.11 NE	1.	$53,000.
56610000	BURLINGTON FOOTWEAR 444 N Pine St Burlington, WI 53105		0.11 NE	3.	$156,329.

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51929901	LOVE, INC 448 S Pine St Burlington, WI 53105		0.12 NE	0.	$581,616.
72310104	THE IRIS WILD 124 N Perkins Blvd Burlington, WI 53105		0.12 SE	2.	$45,000.
58130105	LUCKY MOJO'S 460 N Pine St Burlington, WI 53105		0.12 NE	3.	$90,000.
17310000	ELECTRIC CHAIR 136 E Chestnut St Burlington, WI 53105		0.12 NW	2.	$100,000.
59450103	HOUNDS DETECTORS AND HOBBIES LLC 140 E Chestnut St Burlington, WI 53105		0.12 NE	1.	$29,000.
58120103	BEIJING GARDEN CHINESE RESTAURANT 464 N Pine St Burlington, WI 53105		0.12 NE	3.	$95,000.
99992222	BELLE BON BON 489 Milwaukee Ave Burlington, WI 53105		0.12 NW	0.	$0.
72990903	CHRISTYS BRIDAL & FORMAL WEAR 489 Milwaukee Ave Burlington, WI 53105		0.12 NW	3.	$130,000.
78320000	PLAZA THEATRE 317 N Dodge St Burlington, WI 53105		0.12 NE	7.	$150,000.
78320000	PLAZA THEATER 317 N Dodge St Burlington, WI 53105		0.12 NE	4.	$200,000.
73740102	WEB MEDIA INC 317 N Dodge St Burlington, WI 53105		0.12 NE	2.	$100,000.
59479901	CARD COTTAGE 472 N Pine St Burlington, WI 53105		0.12 NE	0.	$430,000.
60620000	CO OPERATIVE CREDIT UNION 473 Milwaukee Ave Burlington, WI 53105		0.12 NW	5.	$270,902.
79991123	BEAR FOOT YOGA LLC 217 E Jefferson St Burlington, WI 53105		0.12 NE	1.	$42,000.
65190000	MTTP LLC 217 E Jefferson St Burlington, WI 53105		0.12 NE	1.	$70,000.
64110000	ZAREK INSURANCE, INC 124 E Chestnut St Burlington, WI 53105		0.12 NE	4.	$460,000.

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72310103	ABSOLU SALON 160 E Chestnut St Burlington, WI 53105		0.13 NE	1.	$31,000.
80490401	TIM CAUFIELD PHD LLC 484 N Pine St Burlington, WI 53105		0.13 NE	7.	$200,000.
58129902	PINE STREET CAFE 141 N Pine St Burlington, WI 53105		0.13 SE	0.	$0.
57220202	BIGELOW APPLIANCE SALES & SERVICE INC 481 Milwaukee Ave Burlington, WI 53105		0.13 NW	10.	$1,100,000.
58120600	R. ZUMPANO, LLC 180 E Chestnut St Burlington, WI 53105		0.13 NE	0.	$0.
58120304	492 PINE COFFEE HOUSE LLC 492 N Pine St Burlington, WI 53105		0.13 NE	0.	$0.
60210000	JOHNSON BANK NA 101 W Chestnut St Burlington, WI 53105		0.13 NW	19.	$12,370,806.
72310000	A CUT ABOVE HAIR SALON 120 W Chestnut St Burlington, WI 53105		0.13 NW	5.	$180,000.
81110000	LAWYER GIRLS LLC 202 E Chestnut St Burlington, WI 53105		0.13 NE	2.	$120,000.
79910102	ROYAL J WEST FLYING DRAGONS MARTIAL 508 N Pine St Burlington, WI 53105		0.13 NE	3.	$130,000.
64110301	OLDENBURG INSURANCE AGENCY INC 100 E Chestnut St Burlington, WI 53105		0.13 NW	9.	$870,000.
07529901	THE WHISKER WORKS 525 N Pine St Burlington, WI 53105		0.13 NE	1.	$30,000.
65310100	LUDWIG REAL ESTATE LLC 225 N Dodge St Burlington, WI 53105		0.14 NE	2.	$120,000.
80939903	THERAPY 117 W Chestnut St Burlington, WI 53105		0.14 NW	0.	$0.
82110000	DOVER CENTER SCHOOL 100 N Kane St Burlington, WI 53105		0.14 SE	0.	$0.
82110303	BURLINGTON AREA SCHOOL DISTRICT 100 N Kane St Burlington, WI 53105		0.14 SE	15.	$22,200,000.

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82110000	ARCADE DRIVERS SCHOOL 232 Madison St Burlington, WI 53105		0.14 SE	0.	$0.
72160000	MICHAEL TODD'S INC 108 W Chestnut St Burlington, WI 53105		0.14 NW	3.	$120,000.
64110000	MAYS INSURANCE AGENCY INC 500 N Pine St Burlington, WI 53105		0.14 NE	10.	$1,000,000.
92210404	BURLINGTON POLICE DEPARTMENT 224 E Jefferson St Burlington, WI 53105		0.14 NE	21.	$0.
47240000	CHOCOLATE CITY CRUISE & TRAVEL 100 W Chestnut St Burlington, WI 53105		0.15 NW	6.	$1,200,000.
80110000	ORIENTAL HEALING OASIS & WELLN 100 W Chestnut St Burlington, WI 53105		0.15 NW	3.	$200,000.
61119904	BADGERLAND FARM CREDIT SERVICES INC 209 N Dodge St Burlington, WI 53105		0.15 SE	5.	$1,487,745.
57360000	ROCKING FUN MUSIC TM RECORDS 549 N Pine St Burlington, WI 53105		0.15 NE	1.	$58,000.
92249901	BURLINGTON CITY FIRE DEPT 165 W Washington St Burlington, WI 53105		0.15 SW	4.	$0.
92249902	CITY OF BURLINGTON 165 W Washington St Burlington, WI 53105		0.15 SW	0.	$0.
41199902	BURLINGTON RESCUE SQUAD INC 165 W Washington St Burlington, WI 53105		0.15 SW	20.	$243,575.
64110300	STATE FARM 109 N Pine St Burlington, WI 53105	64118011	0.15 SE	4.	$340,000.
27520101	BULLETIN PRINTING AND OFFICE SUPPLIES, 516 N Pine St Burlington, WI 53105		0.15 NE	0.	$680,000.
59929901	BURLINGTON FLOWERS 516 N Pine St Burlington, WI 53105		0.15 NE	2.	$76,000.
59959902	18 EYEGLASSES PLACE 581 N Pine St Burlington, WI 53105		0.15 NE	3.	$140,000.
58120602	NAPOLI PIZZA & RESTAURANT 132 N Pine St Burlington, WI 53105		0.15 SE	3.	$98,000.

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72319902	HAIRS THE SHOP 517 Milwaukee Ave Burlington, WI 53105		0.15 NW	1.	$28,000.
89990000	HOME SERVICES 117 Johnson St Burlington, WI 53105		0.15 SW	1.	$40,000.
52710000	MANOR SALES & MARKETING, INC 525 Milwaukee Ave Burlington, WI 53105		0.16 NW	12.	$1,500,000.
80420100	NEIGHBORHOOD OPTOMERTY 124 W Chestnut St Burlington, WI 53105		0.16 NW	3.	$130,000.
79290109	MOBILE MEMORIES INC 365 Milwaukee Ave Burlington, WI 53105		0.16 NW	1.	$75,000.
79999901	MIDWEST WILDLIFE GALLERIES 224 E Chestnut St Burlington, WI 53105		0.16 NE	3.	$150,000.
83220000	RACINE COUNTY OPPORTUNITY CENTER INC 132 W Chestnut St Burlington, WI 53105		0.16 NW	8.	$1,903,243.
64110300	FARMER'S INSURANCE 144 E State St Ste 1 Burlington, WI 53105	64118005	0.16 SE	1.	$70,000.
58130101	JOHN'S MAIN EVENT 556 N Pine St Burlington, WI 53105		0.16 NE	2.	$110,000.
50480000	W V A 139 W Chestnut St Burlington, WI 53105		0.16 NW	60.	$20,300,000.
83220000	WEST WIND FAMILY COUNSELING 152 E State St Burlington, WI 53105		0.16 SE	6.	$899,533.
87330203	SPINNING TOP MUSEUM 533 Milwaukee Ave Burlington, WI 53105		0.16 NW	1.	$81,000.
62110102	MERRILL LYNCH 116 N Pine St Burlington, WI 53105		0.16 SE	8.	$2,104,176.
58120500	GRATER TATER, LLC 140 W Chestnut St Burlington, WI 53105		0.17 NW	0.	$0.
87210200	MCMAHON VELTUS S C 140 W Chestnut St Burlington, WI 53105		0.17 NW	16.	$520,000.
62110102	A G EDWARDS 180 141 W Chestnut St Burlington, WI 53105		0.17 NW	12.	$2,362,349.

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79110000	INNOVATONS DANCE STUDIO 157 W Chestnut St Burlington, WI 53105		0.17 NW	2.	$57,000.
80499901	ALLEXI CHIROPRACTIC & ACUPUNCTURE 609 N Pine St Burlington, WI 53105		0.17 NW	1.	$42,000.
82110200	PLYMOUTH CHILDRENS CENTER 148 E State St Ste A Burlington, WI 53105		0.17 SW	0.	$0.
80119905	ADVANCED SURGERY OF BURLINGTON 148 E State St Burlington, WI 53105		0.17 SW	3.	$140,000.
51499902	CHOCOLATE EXPRESSION 256 E Chestnut St Ste 2 Burlington, WI 53105		0.17 NE	5.	$270,000.
70110400	HAMPTON INN 400 N Dodge St Burlington, WI 53105	70118022	0.17 NE	19.	$610,000.
58120112	EL BURRITO LOCO 557 Milwaukee Ave Burlington, WI 53105		0.17 NW	0.	$0.
94310000	WESTERN RACINE COUNTY HEATLH 156 E State St Burlington, WI 53105		0.17 SW	10.	$0.
51980100	JCS PAINT 588 N Pine St Burlington, WI 53105		0.17 NE	2.	$160,000.
72310000	STYLERS HAIR STUDIO 349 Milwaukee Ave Burlington, WI 53105		0.17 SW	6.	$120,000.
81110000	RIZZO & DIERSEN 549 Milwaukee Ave Burlington, WI 53105		0.17 NW	0.	$470,000.
73730000	IFS 164 W STATE ST Burlington, WI 53105		0.17 SW	0.	$0.
59991100	MOLITOR PET AND BIRD CLINIC INC 108 N Pine St Burlington, WI 53105		0.17 SE	4.	$340,000.
80490401	CLINICAL PSYCHOLOGY ASSOCIATES 345 Milwaukee Ave Burlington, WI 53105		0.18 SW	14.	$560,000.
07520000	JUST PAWS DOG & CAT GROOM 148 W Chestnut St Burlington, WI 53105		0.18 NW	2.	$44,000.
60220000	FOX RIVER STATE BANK 241 E Jefferson St Burlington, WI 53105		0.18 NE	26.	$3,528,000.

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67120000	FOX RIVER FINANCIAL CORPORATION 241 E Jefferson St Burlington, WI 53105		0.18 NE	2.	$220,000.
58120000	FREDS PARKVIEW 596 N Pine St Burlington, WI 53105		0.18 NE	20.	$560,000.
89990000	GALAXY APPRAISER SERVICES 332 Milwaukee Ave Burlington, WI 53105		0.18 SW	1.	$39,000.
17310000	WAYNES ELECTRIC L L C 156 Reynolds Ave Burlington, WI 53105		0.18 NW	2.	$175,000.
87120000	STELLING & ASSOCIATES ARCHITECTS LTD 181 W Chestnut St Burlington, WI 53105		0.19 NW	9.	$300,000.
80820000	HOME HELPERS 158 W Chestnut St Burlington, WI 53105	80828003	0.19 NW	1.	$81,000.
62110102	EDWARD JONES 01534 101 N Dodge St Burlington, WI 53105		0.19 SE	2.	$505,261.
50840518	WELDERS SUPPLY 516 Mill St Burlington, WI 53105		0.19 NW	6.	$1,133,333.
87410100	MPC PROPERTY MANAGEMENT 615 N Pine St Ste 102 Burlington, WI 53105		0.19 NW	2.	$160,000.
83220000	UNITED WAY OF RACINE COUNTY 615 N Pine St Burlington, WI 53105		0.19 NW	2.	$79,000.
82110203	ELKHORN ARMY RECRUITING 165 W Chestnut St Burlington, WI 53105		0.19 NW	0.	$0.
62820000	FAIR WINDS FINANCIAL LLC 109 S Kane St Burlington, WI 53105		0.20 SW	2.	$100,000.
79910103	A YOUNGER YOU SC 333 Milwaukee Ave Burlington, WI 53105		0.20 SW	16.	$500,000.
72319902	NELSON'S MANE CONCERN 164 W Chestnut St Burlington, WI 53105		0.20 NW	6.	$120,000.
72310000	HAIR BY RED & LUANN 164 W Chestnut St Burlington, WI 53105		0.20 NW	2.	$48,000.
72310104	LINDA'S NAIL & HAIR CARE 164 W Chestnut St Burlington, WI 53105		0.20 NW	3.	$84,000.

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80210000	N L EASLEY DDS 189 W Chestnut St Burlington, WI 53105		0.20 NW	8.	$420,000.
60220000	JPMORGAN CHASE BANK, NATIONAL 189 E Chestnut St Burlington, WI 53105		0.20 NW	13.	$2,509,906.
60229901	JOHNSON BANK 565 Milwaukee Ave Ste 3a Burlington, WI 53105		0.20 NE	1.	$69,604.
62110102	EDWARD JONES 11530 565 Milwaukee Ave Ste 3b Burlington, WI 53105		0.20 NE	2.	$505,261.
64110000	A F L A C 565 Milwaukee Ave Ste 2d Burlington, WI 53105	64118003	0.20 NE	2.	$140,000.
80990000	BURLINGTON BEHAVIORAL HEALTH, LLC 565 Milwaukee Ave Ste 3c Burlington, WI 53105		0.20 NE	5.	$180,000.
80110107	PURATH HEADACHE & NEUROLOGY S.C. 565 Milwaukee Ave Burlington, WI 53105		0.20 NE	3.	$120,000.
65310100	BEAR REALTY OF BURLINGTON INC 565 Milwaukee Ave Ste 1 Burlington, WI 53105		0.20 NE	15.	$1,200,000.
07820200	GROUND EFFECTS 180 W State St Burlington, WI 53105		0.20 SW	6.	$240,000.
64110301	KRASCNEWSKI AGENCY 111 S Pine St Burlington, WI 53105		0.20 SE	3.	$210,000.
73340000	AT YOUR SERVICE INC 111 S Pine St Burlington, WI 53105		0.20 SE	6.	$400,000.
50130100	NAPA 517 Mill St Burlington, WI 53105	55318021	0.20 NW	6.	$740,000.
50510204	METALS ENTERPRISES INC 111 N Dodge St Burlington, WI 53105		0.20 SE	6.	$910,000.
79910000	SNAP FITNESS 116 N Dodge St Ste 2 Burlington, WI 53105	79918017	0.20 SE	3.	$120,000.
80110000	NATHAN LEBAK MD 116 N Dodge St Burlington, WI 53105		0.20 SE	3.	$140,000.
72310000	SALON DE BELLE LLC 116 N Dodge St Ste 7 Burlington, WI 53105		0.20 SE	3.	$110,000.

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81110000	BOYLE LAW OFFICE 116 N Dodge St Ste 1 Burlington, WI 53105		0.20 SE	3.	$200,000.
81110000	BRETT EKES 116 N Dodge St Ste 1 Burlington, WI 53105		0.20 SE	1.	$83,000.
80110108	ONCOLOGY ALLIANCE SC 116 N Dodge St Ste 8 Burlington, WI 53105		0.20 SE	3.	$170,000.
72990105	PANTRUM TANNING SALON 116 N Dodge St Ste 3 Burlington, WI 53105		0.20 SE	3.	$110,000.
83220601	CATHE 125 E State St Burlington, WI 53105		0.20 SW	20.	$247,715.
79991123	PEACE TREE YOGA 125 E State St Burlington, WI 53105		0.20 SW	2.	$70,000.
82110201	ATA MARTIAL ARTS 125 E State St Burlington, WI 53105		0.20 SW	0.	$0.
58120310	CHARCOAL GRILL 580 Milwaukee Ave Burlington, WI 53105		0.21 NE	12.	$330,000.
50720000	KLACZEK, CARGILE 105 N Dodge St Burlington, WI 53105		0.21 SE	12.	$980,000.
80490502	AURORA VNA ASSOC OF WIS 103 N Dodge St Burlington, WI 53105		0.21 SE	2.	$74,000.
43110000	US POST OFFICE 100 S Pine St Burlington, WI 53105		0.21 SE	41.	$0.
73899999	LAWRENCE HENNING FALLER 209 W Jefferson St Burlington, WI 53105		0.21 SW	2.	$120,000.
15210101	MAY, MICHAEL BLDG RESTORATION 141 W State St Burlington, WI 53105		0.21 SW	1.	$86,000.
55310103	BUMPER-TO-BUMPER 701 N Pine St Burlington, WI 53105		0.21 NW	5.	$1,000,000.
80990100	ODYSSEY HEALTHCARE, INC. 197 W Chestnut St Burlington, WI 53105		0.21 NW	4.	$204,801.
27110000	HI LITER SHOPPING GUIDE 700 N Pine St Burlington, WI 53105		0.22 NW	0.	$0.

Data Note: Businesses are listed based on their proximity to the study area location. A maximum of 250 records can be displayed on one report.
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Business Locations

City of Burlington, United States
Drive Times: 5, 15 minute radii

Prepared by Esri
Latitude: 42.67835
Longitude: -88.27704

Code	Business Name	Franchise	Distance From Site in Miles	Employees	Sales
87420000	BUSINESS SOLUTIONS 340 Bridge St Burlington, WI 53105		0.22 NE	5.	$380,000.
65120000	JHW PROPERTIES 180 W Chestnut St Burlington, WI 53105		0.22 NW	3.	$180,000.
72310104	BEAUTY NAILS 316 Bridge St Burlington, WI 53105		0.22 NE	3.	$61,000.
81110207	NICKOLAI & POLETTI LLC 308 Milwaukee Ave Burlington, WI 53105		0.22 SW	2.	$94,000.
60359902	NORTH SHORE BANK, F S B 116 S Pine St Burlington, WI 53105		0.22 SE	7.	$1,138,750.
82110300	ST CHARLES SCHOOL 449 Conkey St Burlington, WI 53105		0.22 NW	25.	$1,018,518.
87110000	MILL EQUIPMENT COMPANY INC 124 S Dodge St Ste 3 Burlington, WI 53105		0.23 SE	5.	$400,000.
75380000	DOUG'S AUTO SERVICE INC 717 N Pine St Burlington, WI 53105		0.23 NW	2.	$180,000.
47240000	ONE WORLD TRAVEL LLC 303 Milwaukee Ave Burlington, WI 53105		0.23 SW	2.	$150,000.
81119902	LAW OFFICE OF SUZANNE SMITH 303 Milwaukee Ave Burlington, WI 53105		0.23 SW	3.	$160,000.
81119901	KONICEK KAISER & SCHOLVE 133 S Pine St Burlington, WI 53105		0.23 SE	11.	$730,000.
72910000	H & R BLOCK 224 E State St Burlington, WI 53105	72918002	0.23 SW	35.	$730,000.
60229901	COMMUNITY STATE BANK (INC) 308 Bridge St Burlington, WI 53105		0.24 NE	8.	$808,949.
55219902	STATE AUTO SALES 80 McHenry St Burlington, WI 53105		0.24 SW	1.	$95,000.
75380000	KOEHN'S HILLSIDE AUTO INC 80 McHenry St Burlington, WI 53105		0.24 SW	4.	$230,000.
80410000	CONTENT BY BURLINGTON FAMILY 196 W Chestnut St Burlington, WI 53105		0.24 NW	2.	$83,000.

Data Note: Businesses are listed based on their proximity to the study area location. A maximum of 250 records can be displayed on one report.
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Business Locations

City of Burlington, United States
Drive Times: 5, 15 minute radii

Prepared by Esri
Latitude: 42.67835
Longitude: -88.27704

Code	Business Name	Franchise	Distance From Site in Miles	Employees	Sales
80490000	THOMAS A MARKUS DPM 196 W Chestnut St Ste B Burlington, WI 53105		0.24 NW	2.	$70,000.
80210000	WILLIAM H BASIL DDS 222 Adams St Burlington, WI 53105		0.24 SE	8.	$410,000.
80119905	EYE PHYSICIAN & SURGEONS SC 222 Adams St Burlington, WI 53105		0.24 SE	12.	$465,000.
59320101	B & B USED FURNITURE & THINGS 164 Commerce St Burlington, WI 53105		0.24 NW	1.	$12,000.
55990000	VANDELAY MOTORS LLC 724 S Pine St Burlington, WI 53105		0.24 NW	2.	$110,000.
73590000	GILS RENTALS 164 Commerce St Burlington, WI 53105		0.24 NW	2.	$76,000.
99992222	DMZ MC INC 724 N Pine St Ste D Burlington, WI 53105		0.24 NW	0.	$0.
89990000	COMPL MUSIC DJ SVC 232 Amanda St Burlington, WI 53105		0.24 SW	1.	$45,000.
80410000	ANDERSON CHIROPRACTIC OFFICE 733 N Pine St Burlington, WI 53105		0.25 NW	7.	$460,000.
80410000	BAUMAN CHIROPRACTIC 733 N Pine St Burlington, WI 53105		0.25 NW	3.	$170,000.
80430000	ADVANCED FOOT ANKLE OF WISCONSIN LLC 733 N Pine St Burlington, WI 53105		0.25 NW	3.	$120,000.
80110202	WEBLEY CHIROPRACTIC CLINIC 733 N Pine St Burlington, WI 53105		0.25 NW	11.	$530,000.
58130105	LOG CABIN TAVERN 233 W Jefferson St Burlington, WI 53105		0.25 SW	5.	$140,000.
64110000	RANDY CANALES 141 S Pine St Burlington, WI 53105		0.25 SE	1.	$140,000.
87210101	RICHARD ZDANOWSKI INC 141 S Pine St Burlington, WI 53105		0.25 SE	2.	$120,000.
82119901	ST MARY SCHOOL 225 W State St Burlington, WI 53105		0.25 SW	30.	$1,200,000.

Data Note: Businesses are listed based on their proximity to the study area location. A maximum of 250 records can be displayed on one report.
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Business Locations

City of Burlington, United States
Drive Times: 5, 15 minute radii

Prepared by Esri
Latitude: 42.67835
Longitude: -88.27704

Code	Business Name	Franchise	Distance From Site in Miles	Employees	Sales
73890000	HEMBROOK ENTERPRISES LLC 240 Amanda St Burlington, WI 53105		0.25 SW	3.	$120,000.
86610106	ST CHARLES CATHOLIC CHURCH 440 Kendall St Burlington, WI 53105		0.26 NW	0.	$1,100,000.
99992222	FRANCISCAN MISSIONARY SISTERS OF 456 Kendall St Burlington, WI 53105		0.26 NW	0.	$0.
73899999	GEORGE LOESCH 208 W Chestnut St Burlington, WI 53105		0.26 NW	2.	$120,000.
87429908	ALDRICH FINANCIAL 265 Milwaukee Ave Burlington, WI 53105		0.26 SW	4.	$230,000.
34440300	KETTERS SEAMLESS GUTTER SVC 257 Milwaukee Ave Burlington, WI 53105		0.27 SW	3.	$100,000.
81119901	DALEY LAW OFFICE 155 S Pine St Burlington, WI 53105		0.27 SE	1.	$76,000.
81119901	DANIEL LAW OFFICE 155 S Pine St Burlington, WI 53105		0.27 SE	3.	$170,000.
65310100	JACK BAKER 141 W Chandler Blvd Burlington, WI 53105		0.28 SW	1.	$84,000.
58120000	BJ WENTKERS HSTRIC FINE DINING 230 Milwaukee Ave Burlington, WI 53105		0.28 SW	20.	$610,000.
15210101	HUMPHREYS HOME IMPROVEMENT 232 W Chestnut St Burlington, WI 53105		0.28 NW	1.	$95,000.
55119901	BURLINGTON AUTO SALES 548 Bridge St Burlington, WI 53105		0.29 NE	2.	$270,000.
65120000	BRYCE STYZA PROPERTIES 232 Bridge St Burlington, WI 53105		0.29 SE	3.	$150,000.
73899999	MATTHEW W REIDENBACH 232 Bridge St APT 109 Burlington, WI 53105		0.29 SE	2.	$120,000.
15210000	HARMONY HOMES INC 232 Bridge St APT 430 Burlington, WI 53105		0.29 SE	1.	$81,000.
87480000	CCDSOLUTIONS CONSULTANT 232 Bridge St APT 241 Burlington, WI 53105		0.29 SE	1.	$53,000.

Data Note: Businesses are listed based on their proximity to the study area location. A maximum of 250 records can be displayed on one report.
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Business Locations

City of Burlington, United States
Drive Times: 5, 15 minute radii

Prepared by Esri
Latitude: 42.67835
Longitude: -88.27704

Code	Business Name	Franchise	Distance From Site in Miles	Employees	Sales
59410101	JOHNS BAIT SHOP 232 Bridge St APT 324 Burlington, WI 53105		0.29 SE	1.	$53,000.
86610106	IMMACULATE CONCEPTION PARISH 108 McHenry St Burlington, WI 53105		0.30 SW	2.	$5,238.
50910000	BURLINGTON GOLF 401 E Washington St Burlington, WI 53105		0.30 NE	1.	$92,000.
58120200	ADRIANS FROZEN CUSTARD 572 Bridge St Burlington, WI 53105		0.30 NE	0.	$0.
86610115	THE SAINT JOHN DIVINE EPISCOPAL 216 E Chandler Blvd Burlington, WI 53105		0.31 SE	4.	$210,000.
80210202	ANDREW KOKODYNSKI 201 S Perkins Blvd Burlington, WI 53105		0.31 SE	0.	$175,000.
73891800	DESIGN WORKS 189 S Pine St Burlington, WI 53105		0.32 SE	1.	$51,000.
50840000	CENTAUR FORGE LLC 117 N Spring St Burlington, WI 53105		0.32 NE	0.	$1,500,000.
65310000	RELPR LLC 173 Duane St Burlington, WI 53105		0.33 SW	1.	$80,000.
53310000	FAMILY DOLLAR STORES 196 S Pine St Burlington, WI 53105		0.33 SE	6.	$54,223.
55219902	FOX RIVER MOTORS 233 N Main St Burlington, WI 53105		0.33 NE	2.	$130,000.
55219902	ROGER'S AUTO SALES INC 233 N Main St Burlington, WI 53105		0.33 NE	4.	$620,000.

Data Note: Businesses are listed based on their proximity to the study area location. A maximum of 250 records can be displayed on one report.
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Exhibit 18: Downtown Burlington in comparison to similar sized WI communities

NAICS	NAICS Description	Burlington Downtown		Average in Comparison Downtowns	
		Number	Sales (000's)	Number	Sales (000's)
44111000, 44112000 81111000, 81112000 & 81119000	Automobile Dealers and mechanical and electrical repair	5	17,131	9.75	21,216
44121000 & 44122000	Other Motor Vehicle Dealers	3	483	0.72	2251
44130000	Automotive parts, accessories, & tire stores	2	1,729	1.79	2,180
44210000	Furniture stores	0	0	1.03	2,322
44220000	Home furnishings stores	2	858	1.18	1,127
44311000, 44312000 & 44313000	Electronics & Appliance Stores	2	1,030	3.57	6,231
44411000, 44412000, 44412000, 44413000 & 44419000	Building Materials & Supplies Dealers	2	1,961	3.67	8,866
44420000 & 81141000	Lawn & garden equipment & supplies stores and repair	0	0	1.76	1,795
44510000	Grocery stores	5	20,394	2.33	23,235
44520000	Specialty food stores	0	0	1.59	1,593
44530000	Beer, wine, & liquor stores	0	0	1.13	2,261
44611000, 44612000, 44613000 & 44619000	Health & Personal Care Stores	6	7,093	3.28	7,452
44710000	Gasoline stations	5	38,303	3.08	9,637
44811000, 44812000, 44813000, 44814000, 44815000, 44819000	Clothing Stores	2	337	3.95	4109
44821000	Shoe stores	1	142	0.77	764
44831000 & 44832000	Jewelry, Luggage & leather goods stores	1	514	2.10	2,036
45111000, 45112000, 45113000 & 45114000	Sporting goods/ Hobby/ Musical Instr. Stores	8	1,024	4.03	3,204
45121000 & 45122000	Book, Periodical & Music Stores	0	0	1.15	2,374
45200000	General merchandise stores	3	2,717	1.67	12,438
45310000	Florists	2	100	2.08	2,527
45321000 & 45322000	Office supplies, stationery & gift stores	1	47	4.10	2040
45330000	Used merchandise stores	2	151	2.54	1,168
45391000 & 45392000	Other miscellaneous store retailers	6	2,458	1.33	965
54192000	Photographic services	-	-	2.31	791
72210000	Full-service restaurants	8	5,050	15.77	11,548
72220000	Limited-service eating places	9	4,789	2.08	806
72240000	Drinking places (alcoholic beverages)	6	601	8.31	2,900

81211200	Beauty salons	1	-	10.54	2,383
81211300	Nail salons	0	0	1.36	183
81219000	Other personal care services (tattoos, spas, piercing)	0	0	0.44	903

Exhibit 19: Retail Marketplace Profile

City of Burlington
Drive Time: 5 minute radius

Prepared by Esri
Latitude: 42.67993
Longitude: -88.27688

Summary Demographics	
2015 Population	10,058
2015 Households	4,066
2015 Median Disposable Income	$42,454
2015 Per Capita Income	$27,542

Industry Summary	NAICS	Demand (Retail Potential)	Supply (Retail Sales)	Retail Gap	Leakage/Surplus Factor	Number of Businesses
Total Retail Trade and Food & Drink	44-45,722	$116,115,960	$162,288,231	-$46,172,271	-16.6	106
Total Retail Trade	44-45	$104,298,845	$148,091,719	-$43,792,874	-17.4	78
Total Food & Drink	722	$11,817,116	$14,196,512	-$2,379,396	-9.1	27

Industry Group	NAICS	Demand (Retail Potential)	Supply (Retail Sales)	Retail Gap	Leakage/Surplus Factor	Number of Businesses
Motor Vehicle & Parts Dealers	441	$21,523,815	$36,078,695	-$14,554,880	-25.3	12
Automobile Dealers	4411	$18,763,604	$33,102,316	-$14,338,712	-27.6	7
Other Motor Vehicle Dealers	4412	$1,409,673	$612,184	$797,489	39.4	3
Auto Parts, Accessories & Tire Stores	4413	$1,350,539	$2,364,195	-$1,013,656	-27.3	2
Furniture & Home Furnishings Stores	442	$2,191,917	$1,486,201	$705,716	19.2	4
Furniture Stores	4421	$1,352,953	$213,433	$1,139,520	72.7	1
Home Furnishings Stores	4422	$838,964	$1,272,768	-$433,804	-20.5	3
Electronics & Appliance Stores	443	$3,511,600	$999,713	$2,511,887	55.7	3
Bldg Materials, Garden Equip. & Supply Stores	444	$3,645,869	$2,787,543	$858,326	13.3	5
Bldg Material & Supplies Dealers	4441	$3,008,433	$526,052	$2,482,381	70.2	4
Lawn & Garden Equip & Supply Stores	4442	$637,436	$2,261,491	-$1,624,055	-56.0	1
Food & Beverage Stores	445	$16,585,440	$44,254,637	-$27,669,197	-45.5	8
Grocery Stores	4451	$15,345,012	$42,931,781	-$27,586,769	-47.3	7
Specialty Food Stores	4452	$414,273	$0	$414,273	100.0	0
Beer, Wine & Liquor Stores	4453	$826,155	$1,318,030	-$491,875	-22.9	1
Health & Personal Care Stores	446,4461	$9,127,015	$12,863,693	-$3,736,678	-17.0	6
Gasoline Stations	447,4471	$12,351,792	$36,804,579	-$24,452,787	-49.7	5
Clothing & Clothing Accessories Stores	448	$5,704,689	$1,114,328	$4,590,361	67.3	4
Clothing Stores	4481	$3,782,894	$521,187	$3,261,707	75.8	3
Shoe Stores	4482	$987,155	$128,894	$858,261	76.9	1
Jewelry, Luggage & Leather Goods Stores	4483	$934,641	$464,247	$470,394	33.6	1
Sporting Goods, Hobby, Book & Music Stores	451	$2,331,298	$1,091,947	$1,239,351	36.2	9
Sporting Goods/Hobby/Musical Instr Stores	4511	$1,789,904	$1,040,708	$749,196	26.5	8
Book, Periodical & Music Stores	4512	$541,394	$51,240	$490,154	82.7	1
General Merchandise Stores	452	$16,118,744	$3,036,384	$13,082,360	68.3	3
Department Stores Excluding Leased Depts.	4521	$7,736,454	$2,115,598	$5,620,856	57.1	2
Other General Merchandise Stores	4529	$8,382,290	$920,786	$7,461,504	80.2	2
Miscellaneous Store Retailers	453	$2,247,797	$3,761,471	-$1,513,674	-25.2	13
Florists	4531	$111,372	$95,954	$15,418	7.4	2
Office Supplies, Stationery & Gift Stores	4532	$707,984	$66,749	$641,235	82.8	2
Used Merchandise Stores	4533	$451,601	$145,598	$306,003	51.2	2
Other Miscellaneous Store Retailers	4539	$976,840	$3,453,171	-$2,476,331	-55.9	7
Nonstore Retailers	454	$8,958,867	$3,812,527	$5,146,340	40.3	6
Electronic Shopping & Mail-Order Houses	4541	$7,624,027	$0	$7,624,027	100.0	0
Vending Machine Operators	4542	$375,727	$324,406	$51,321	7.3	1
Direct Selling Establishments	4543	$959,113	$3,488,121	-$2,529,008	-56.9	5
Food Services & Drinking Places	722	$11,817,116	$14,196,512	-$2,379,396	-9.1	27
Full-Service Restaurants	7221	$4,281,538	$5,113,839	-$832,301	-8.9	9
Limited-Service Eating Places	7222	$6,201,741	$6,437,861	-$236,120	-1.9	12
Special Food Services	7223	$538,128	$0	$538,128	100.0	0
Drinking Places - Alcoholic Beverages	7224	$795,708	$2,640,845	-$1,845,137	-53.7	7

Data Note: Supply (retail sales) estimates sales to consumers by establishments. Sales to businesses are excluded. Demand (retail potential) estimates the expected amount spent by consumers at retail establishments. Supply and demand estimates are in current dollars. The Leakage/Surplus Factor presents a snapshot of retail opportunity. This is a measure of the relationship between supply and demand that ranges from +100 (total leakage) to -100 (total surplus). A positive value represents 'leakage' of retail opportunity outside the trade area. A negative value represents a surplus of retail sales, a market where customers are drawn in from outside the trade area. The Retail Gap represents the difference between Retail Potential and Retail Sales. Esri uses the North American Industry Classification System (NAICS) to classify businesses by their primary type of economic activity. Retail establishments are classified into 27 industry groups in the Retail Trade sector, as well as four industry groups within the Food Services & Drinking Establishments subsector. For more information on the Retail MarketPlace data, please view the methodology statement at http://www.esri.com/library/whitepapers/pdfs/esri-data-retail-marketplace.pdf.
Source: Esri and Dun & Bradstreet. Copyright 2015 Dun & Bradstreet, Inc. All rights reserved.

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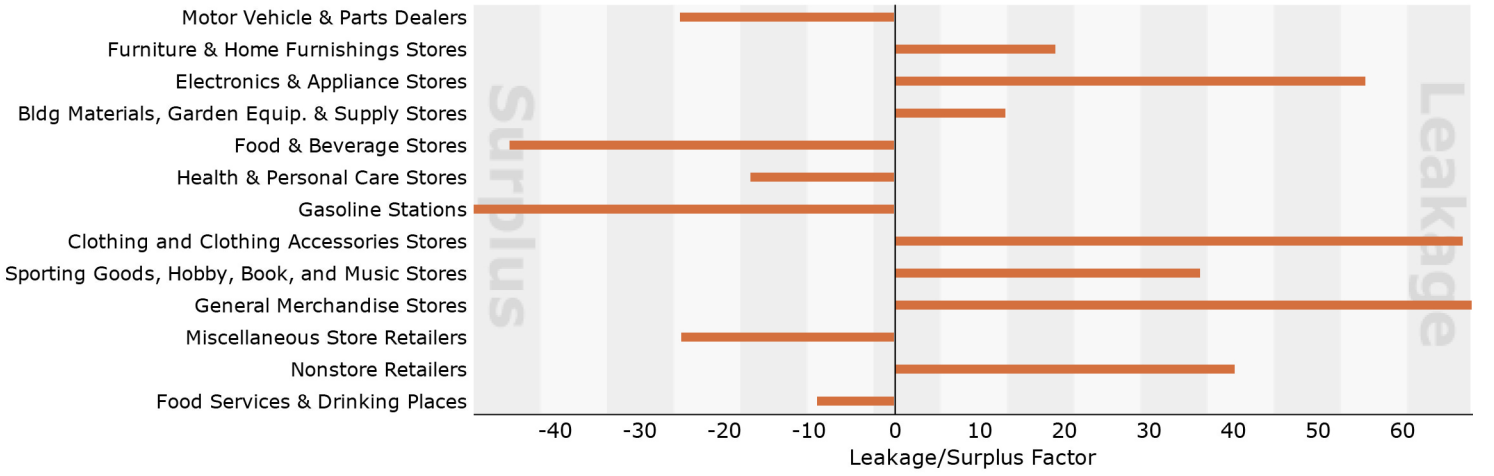
Retail MarketPlace Profile

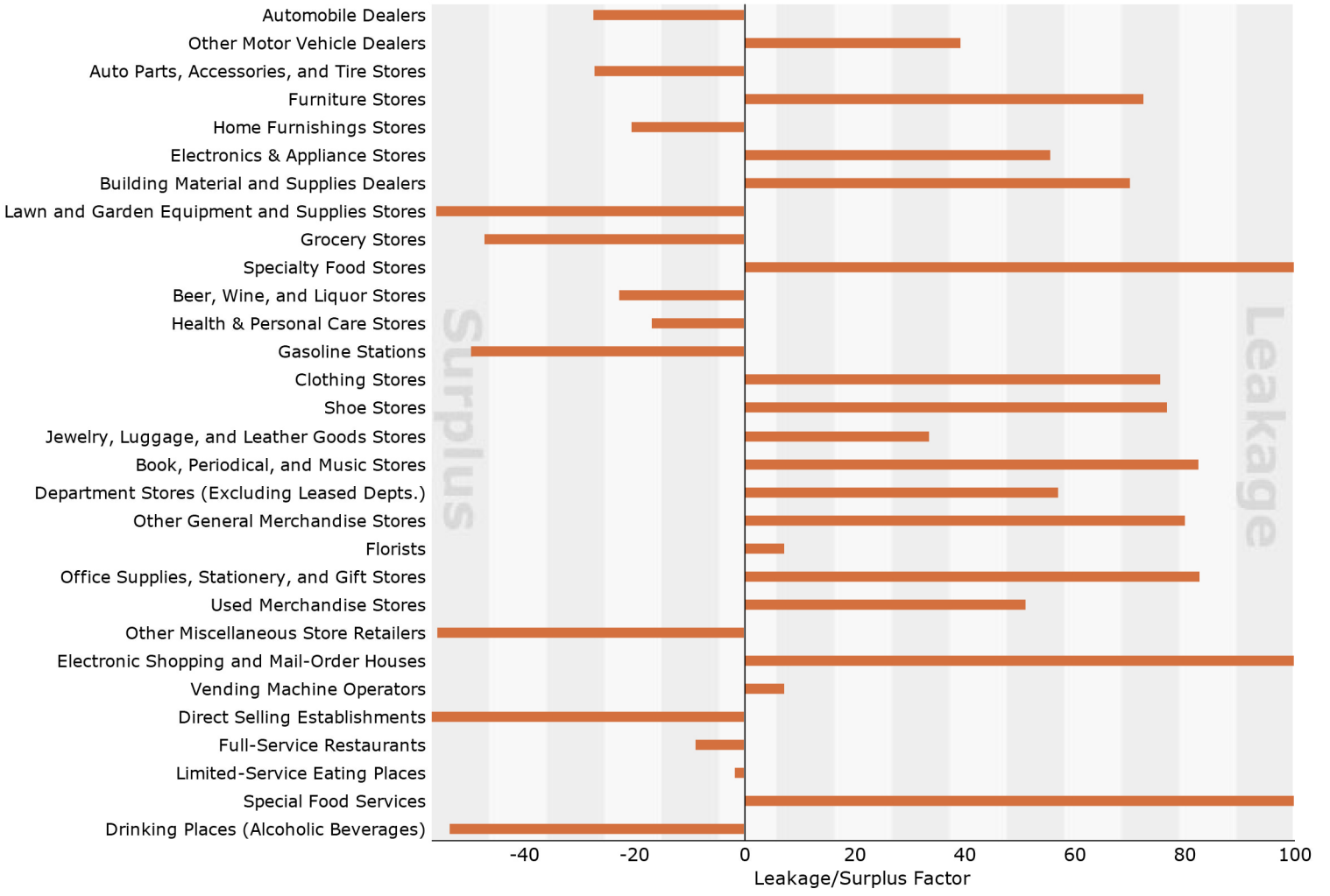
City of Burlington
Drive Time: 5 minute radius

Prepared by Esri
Latitude: 42.67993
Longitude: -88.27688

Leakage/Surplus Factor by Industry Subsector



Leakage/Surplus Factor by Industry Group



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Retail MarketPlace Profile

City of Burlington
Drive Time: 15 minute radius

Prepared by Esri
Latitude: 42.67993
Longitude: -88.27688

Summary Demographics	
2015 Population	35,839
2015 Households	14,137
2015 Median Disposable Income	$49,797
2015 Per Capita Income	$30,763

Industry Summary	NAICS	Demand (Retail Potential)	Supply (Retail Sales)	Retail Gap	Leakage/Surplus Factor	Number of Businesses
Total Retail Trade and Food & Drink	44-45,722	$453,526,636	$343,881,121	$109,645,515	13.8	287
Total Retail Trade	44-45	$408,080,540	$318,453,363	$89,627,177	12.3	218
Total Food & Drink	722	$45,446,096	$25,427,758	$20,018,338	28.2	69

Industry Group	NAICS	Demand (Retail Potential)	Supply (Retail Sales)	Retail Gap	Leakage/Surplus Factor	Number of Businesses
Motor Vehicle & Parts Dealers	441	$85,408,690	$85,362,681	$46,009	0.0	28
Automobile Dealers	4411	$74,359,603	$74,814,306	-$454,703	-0.3	12
Other Motor Vehicle Dealers	4412	$5,814,736	$7,018,594	-$1,203,858	-9.4	11
Auto Parts, Accessories & Tire Stores	4413	$5,234,351	$3,529,781	$1,704,570	19.4	5
Furniture & Home Furnishings Stores	442	$8,534,406	$3,961,695	$4,572,711	36.6	9
Furniture Stores	4421	$5,221,582	$2,260,748	$2,960,834	39.6	3
Home Furnishings Stores	4422	$3,312,824	$1,700,948	$1,611,876	32.1	6
Electronics & Appliance Stores	443	$13,600,245	$2,104,752	$11,495,493	73.2	10
Bldg Materials, Garden Equip. & Supply Stores	444	$14,813,878	$11,721,405	$3,092,473	11.7	21
Bldg Material & Supplies Dealers	4441	$12,120,808	$2,270,278	$9,850,530	68.4	15
Lawn & Garden Equip & Supply Stores	4442	$2,693,069	$9,451,127	-$6,758,058	-55.6	6
Food & Beverage Stores	445	$64,027,072	$96,719,211	-$32,692,139	-20.3	21
Grocery Stores	4451	$59,253,974	$94,069,771	-$34,815,797	-22.7	15
Specialty Food Stores	4452	$1,598,161	$346,262	$1,251,899	64.4	4
Beer, Wine & Liquor Stores	4453	$3,174,938	$2,303,179	$871,759	15.9	2
Health & Personal Care Stores	446,4461	$36,142,650	$32,701,378	$3,441,272	5.0	11
Gasoline Stations	447,4471	$48,150,149	$55,958,412	-$7,808,263	-7.5	12
Clothing & Clothing Accessories Stores	448	$21,740,659	$2,531,239	$19,209,420	79.1	13
Clothing Stores	4481	$14,393,051	$1,091,251	$13,301,800	85.9	7
Shoe Stores	4482	$3,741,194	$338,460	$3,402,734	83.4	2
Jewelry, Luggage & Leather Goods Stores	4483	$3,606,414	$1,101,528	$2,504,886	53.2	4
Sporting Goods, Hobby, Book & Music Stores	451	$9,084,536	$3,674,102	$5,410,434	42.4	25
Sporting Goods/Hobby/Musical Instr Stores	4511	$7,031,025	$3,389,829	$3,641,196	34.9	22
Book, Periodical & Music Stores	4512	$2,053,510	$284,273	$1,769,237	75.7	2
General Merchandise Stores	452	$62,498,715	$5,960,718	$56,537,997	82.6	6
Department Stores Excluding Leased Depts.	4521	$29,938,722	$2,407,896	$27,530,826	85.1	2
Other General Merchandise Stores	4529	$32,559,993	$3,552,823	$29,007,170	80.3	4
Miscellaneous Store Retailers	453	$8,806,312	$10,643,585	-$1,837,273	-9.4	50
Florists	4531	$466,971	$210,822	$256,149	37.8	4
Office Supplies, Stationery & Gift Stores	4532	$2,758,125	$353,450	$2,404,675	77.3	11
Used Merchandise Stores	4533	$1,725,346	$2,398,685	-$673,339	-16.3	12
Other Miscellaneous Store Retailers	4539	$3,855,870	$7,680,628	-$3,824,758	-33.2	23
Nonstore Retailers	454	$35,273,228	$7,114,183	$28,159,045	66.4	14
Electronic Shopping & Mail-Order Houses	4541	$29,788,244	$1,221,244	$28,567,000	92.1	2
Vending Machine Operators	4542	$1,446,784	$873,713	$573,071	24.7	3
Direct Selling Establishments	4543	$4,038,200	$5,019,227	-$981,027	-10.8	9
Food Services & Drinking Places	722	$45,446,096	$25,427,758	$20,018,338	28.2	69
Full-Service Restaurants	7221	$16,472,913	$9,678,210	$6,794,703	26.0	21
Limited-Service Eating Places	7222	$23,838,519	$10,126,085	$13,712,434	40.4	19
Special Food Services	7223	$2,126,570	$208,579	$1,917,991	82.1	2
Drinking Places - Alcoholic Beverages	7224	$3,008,094	$5,414,884	-$2,406,790	-28.6	27

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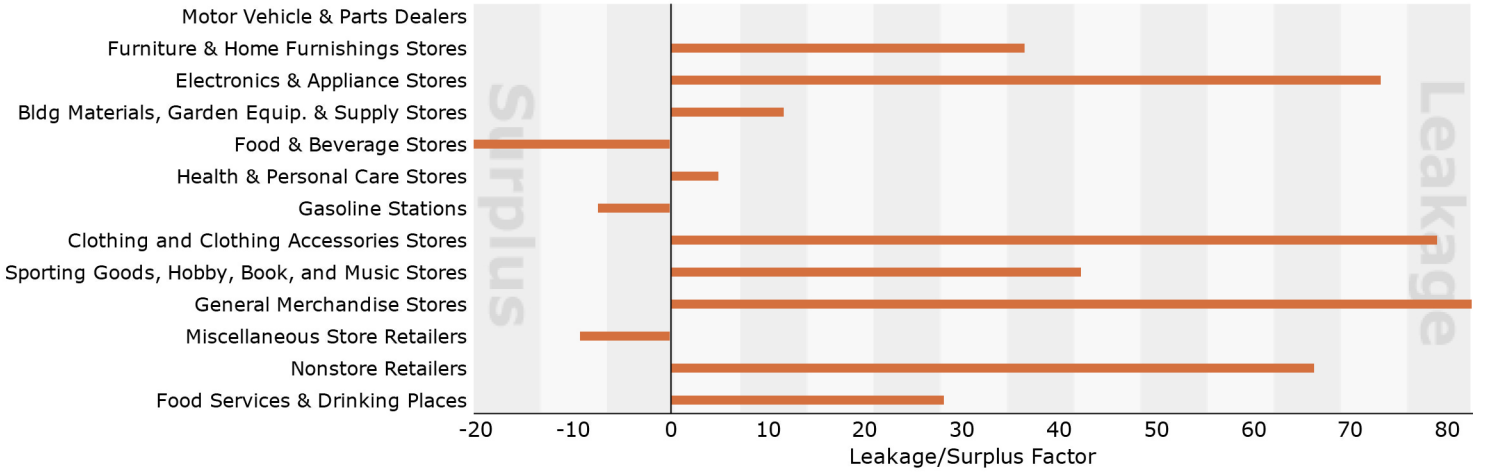
Retail MarketPlace Profile

City of Burlington
Drive Time: 15 minute radius

Prepared by Esri
Latitude: 42.67993
Longitude: -88.27688

Leakage/Surplus Factor by Industry Subsector



Leakage/Surplus Factor by Industry Group

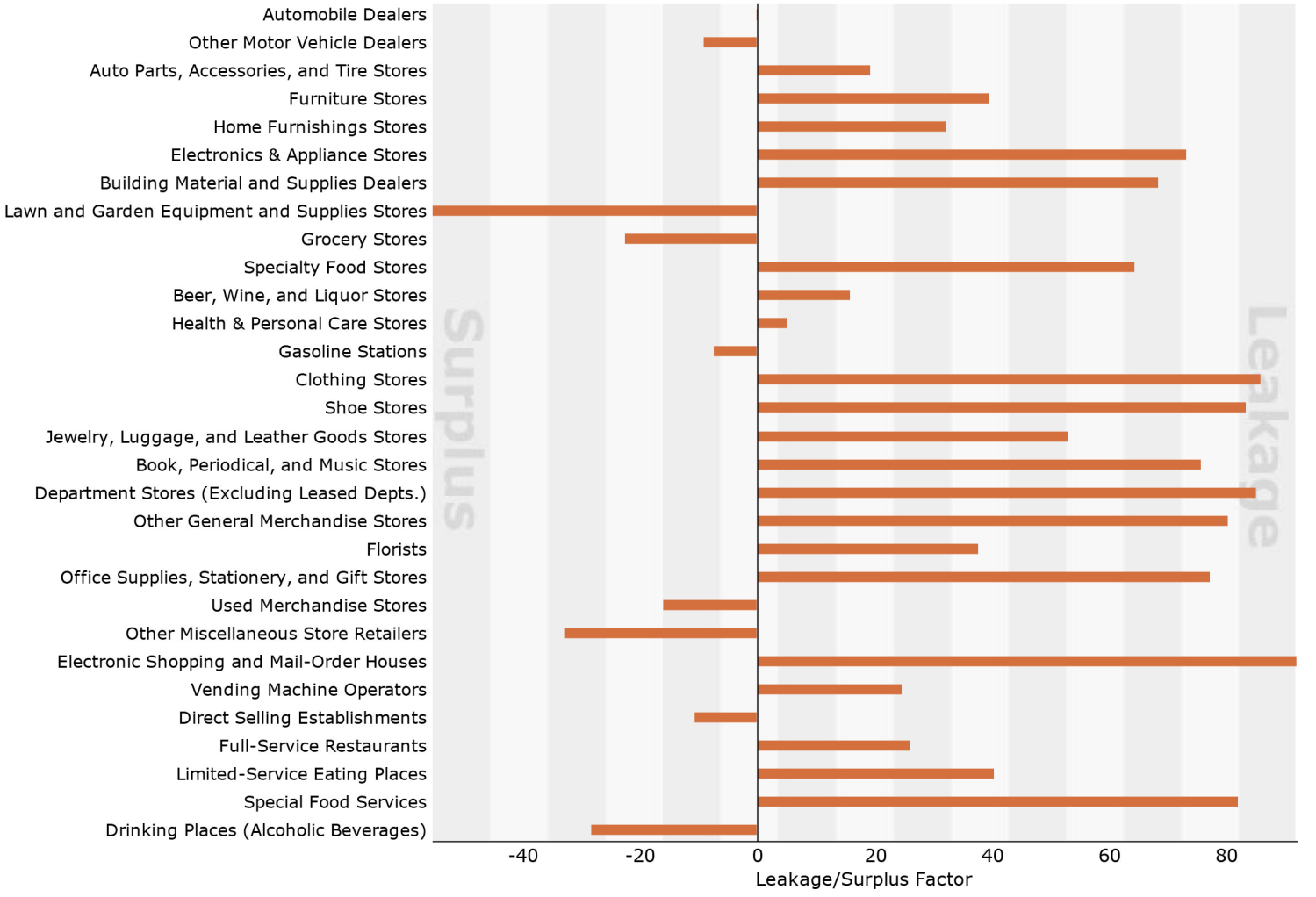


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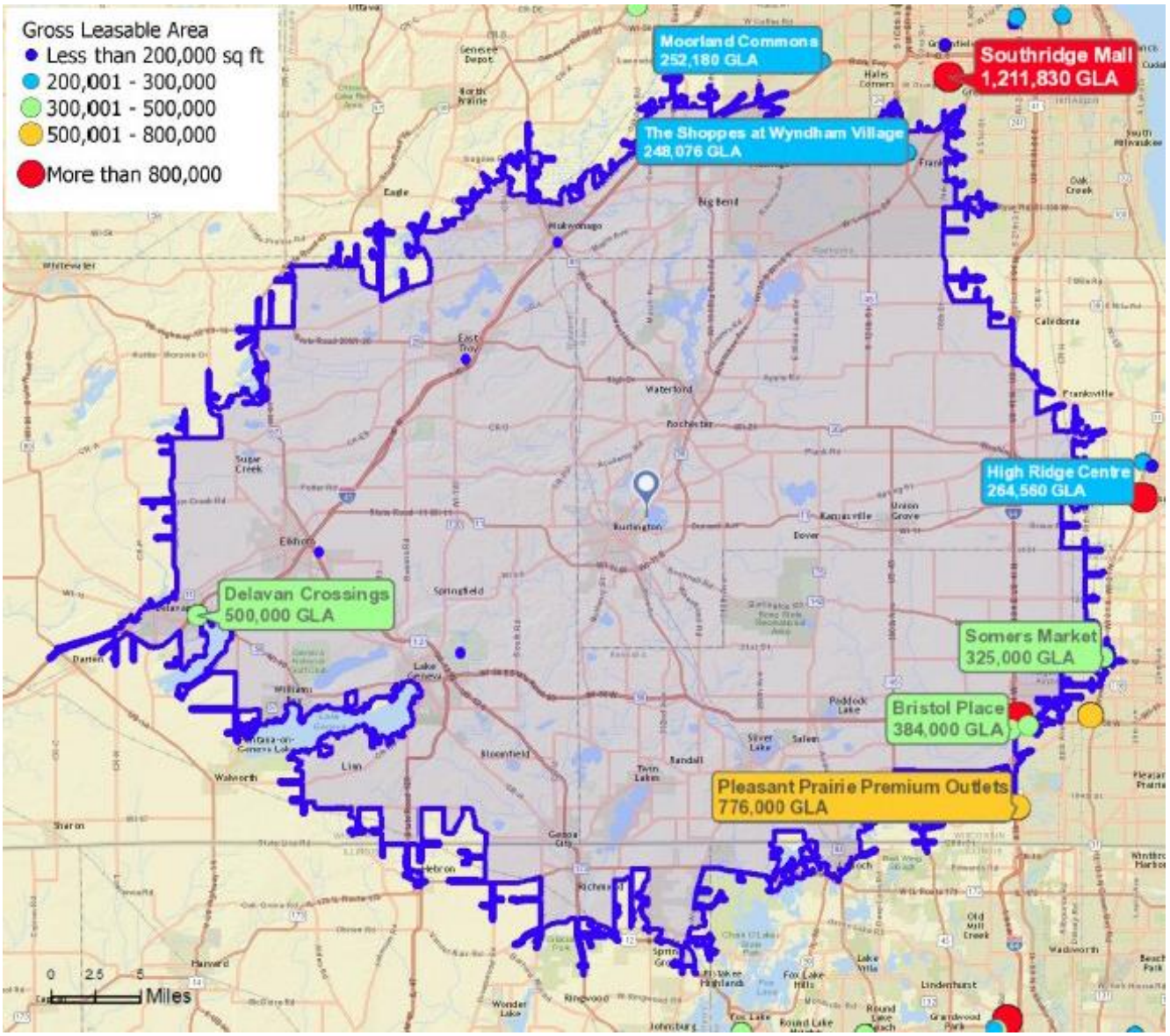
Exhibit 20: Spending Potential Index

	0-5 minute drive time	5-15 minute drive time
	Front Porches (8E)	*Green Acres (6A)*
	Green Acres (6A)	*Salt of the Earth (6B)*
	Middleburg (4C)	*Parks and Rec (5C)*
Clothing & Clothing Accessories Store: Total $	$8,695,840	$32,192,109
Average Spent	$2,095.38	$2,335.30
Spending Potential Index	91	101
Computers & Accessories: Total $	$986,778	$3,657,185
Average Spent	$237.78	$265.30
Spending Potential Index	93	104
Education: Total $	$5,864,498	$21,625,916
Average Spent	$1,413.13	$1,568.80
Spending Potential Index	93	103
Sporting Goods, Hobby, Book, & Music Stores: Total $	$12,496,315	$47,861,298
Average Spent	$3,011.16	$3,471.98
Spending Potential Index	91	105
Food & Beverage Stores: Total $	$19,683,576	$73,942,371
Average Spent	$4,743.03	$5,363.97
Spending Potential Index	91	103
Food Services & Drinking Places: Total $	$12,413,093	$46,393,585
Average Spent	$2,991.11	$3,365.51
Spending Potential Index	91	102
Health & Personal Care: Total $	$18,013,580	$70,663,712
Average Spent	$4,340.62	$5,126.13
Spending Potential Index	92	108
Furniture & Home Furnishing Stores: Total $	$6,939,927	$26,471,684
Average Spent	$1,672.27	$1,920.33
Spending Potential Index	91	104
Investments: Total $	$9,005,115	$32,652,927
Average Spent	$2,169.91	$2,368.73
Spending Potential Index	79	86
Retail Goods: Total $	$95,740,743	$367,240,927
Average Spent	$23,070.06	$26,640.62
Spending Potential Index	90	104
Bldg Materials, Garden Equip. & Supply Stores: Total $	$63,074,976	$230,104,844
Average Spent	$15,198.79	$16,692.41
Spending Potential Index	92	101
Electronics & Appliances Stores: Total $	$4,963,328	$18,578,108
Average Spent	$1,195.98	$1,347.70
Spending Potential Index	91	103
Travel: Total $	$7,403,699	$28,442,380

Average Spent	$1,784.02	$2,063.28
Spending Potential Index	91	106
Motor Vehicles & Part Dealers: Total $	$4,237,268	$16,041,181
Average Spent	$1,021.03	$1,163.67
Spending Potential Index	91	104

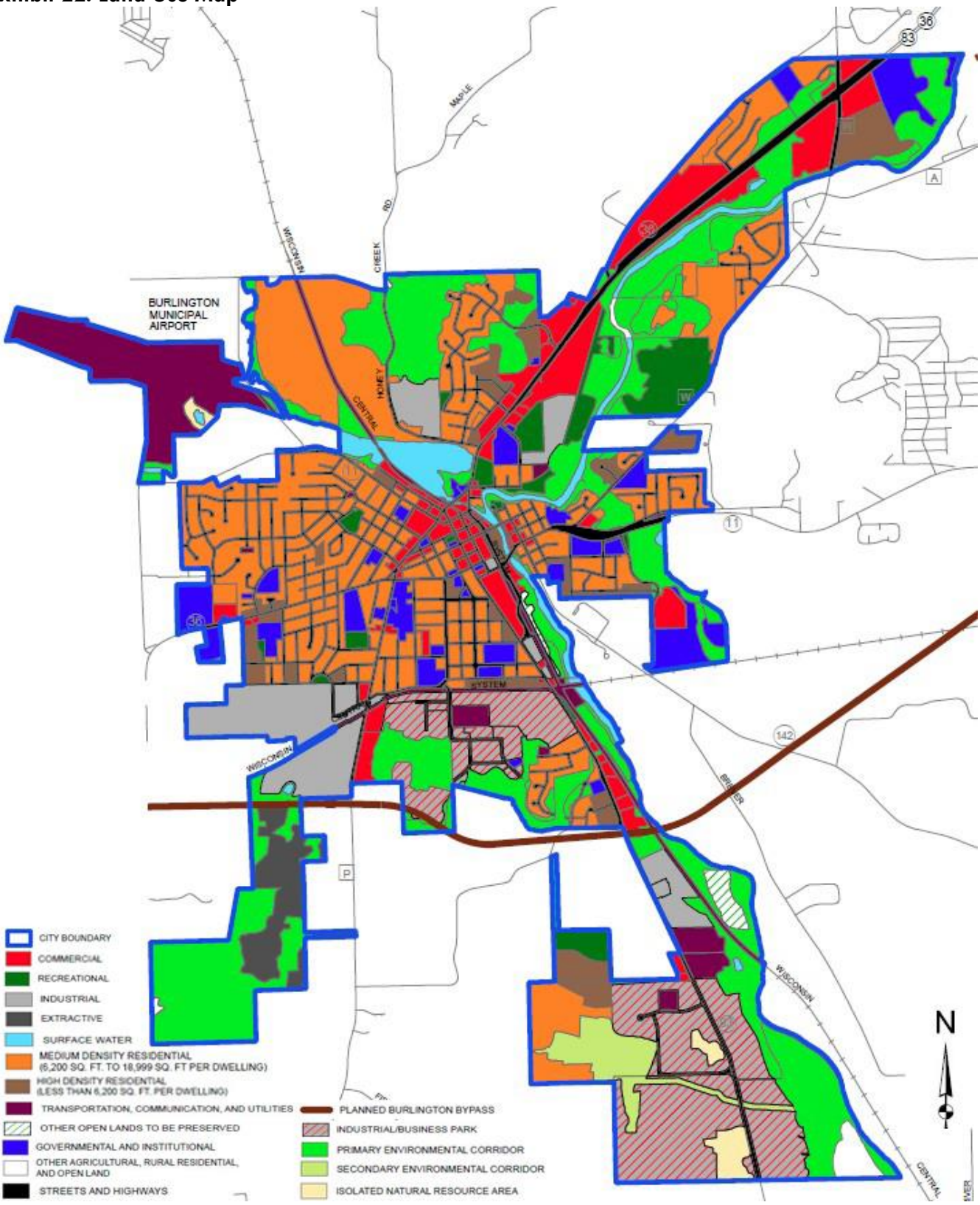
Exhibit 21: Competition retailer's location map



Gross Leasable Area
- Less than 200,000 sq ft
- 200,001 - 300,000
- 300,001 - 500,000
- 500,001 - 800,000
- More than 800,000

Source: Directory of Major Malls, Inc.

Exhibit 22: Land Use Map



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