



DOWNTOWN WILMINGTON
REVITALIZATION PLAN
MARKET ANALYSIS 2008

Prepared For:

THE CITY OF WILMINGTON, OHIO

Prepared By:

BOULEVARD STRATEGIES
Columbus, Ohio

September 2008

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GOALS: Main Street Washington

- Attracted 10 new businesses to downtown from 2011 to 2015 to 3% in 2007
- Attracted 10 new businesses to downtown from 2011 to 2015 to 3% in 2007
- Attracted 240,000 visitors to downtown from 2011 to 2015 to 3% in 2007
- Completed construction and business projects
- Received 100% downtown plan

Economic Development Committee

- Street revitalization projects
- Main Street Washington for Ohio 60 Ohio Main Street
- Received Main Street Certification by National Trust
- Employed Full-Time Workers in Downtown Office
- Attracted 210,000 visitors to downtown from 2011 to 2015 to 3% in 2007
- Completed Washington Main Street Project

Organization Committee

- Host Main Street Events for Main Street Washington Year
- Coordinate Annual Downtown Year Sale
- Organize Main Street Events' groups and Main Street
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Organization Committee

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Organization Committee

MAIN STREET WASHINGTON HIGHLIGHTS

MAIN STREET WILMINGTON HIGHLIGHTS

Organization Committee

- Organized Wilmington Main Street Program
- Raised \$166,328 From 80 Contributors
- Employed Full-Time Manager in Downtown Office
- Received Main Street Certification by National Trust
- Hosted 2-Day State Conference for Over 60 Ohio Main Street Managers/Board Presidents

Design Committee

- Contributed To New Streetlight Project
- Worked with City on Tree Replacement Project
- Hired Landscape Architect to Design Parking Area/Pocket Park in Key Downtown Locations
- Assisted 20+ Building Owners with Façade Designs
- Purchased Planters, Flags, Holiday Decorations

Economic Restructuring Committee

- Revised 1992 Downtown Plan
- Conducted Consumer and Business Surveys
- Awarded \$400,000 ODOD Tier 2 Grant to Improve Downtown Buildings/Infrastructure
- Assisted in Reducing First Floor Downtown Vacancy Rate from 20% in 2002 to 2% in 2007
- Attracted 10 New Businesses to Downtown

Promotion Committee

- Co-Sponsored Harry Potter Night Attracting 4,000 Visitors and National Media Attention
- Organized Brown Bag Lunch Series at Murphy Theatre
- Coordinate Holiday Events, Sponsor Murphy Theatre Christmas Show
- Coordinate Annual Downtown Yard Sale
- Hold Numerous Events for Members Throughout Year

SOURCE: Main Street Wilmington

DOWNTOWN WILMINGTON REVITALIZATION PLAN MARKET ANALYSIS 2008

I. INTRODUCTION

A. Project Background

- Wilmington is the county seat of Clinton County, Ohio, about 45 minutes northeast of downtown Cincinnati.
- It is a small town of about 12,500 persons that has maintained its unique identity as suburban sprawl swallows communities to the west and south.
- About half of Clinton County's population of 43,000 persons live in fast growing unincorporated townships surrounding the City of Wilmington.
- Downtown Wilmington represents the cultural center of the region with preservation of historic gems such as the Murphy Theater and the General Denver Hotel, and 1,200 Wilmington college students a half mile away.
- Downtown Wilmington became a Main Street community in 2003 reflecting its serious interest in historic preservation and downtown revitalization.
- As shown in the facing exhibit, Main Street Wilmington is a strong, vital organization in spite of its relative youth (or maybe because of it).
- In addition, the City of Wilmington is in the process of completing a downtown plan and a comprehensive plan.
- The City of Wilmington contracted with Poggemeyer Design Group and its subconsultant Boulevard Strategies to complete a Downtown Revitalization Plan Market Analysis.
- This study is funded by a Tier 1 ODOT matching grant of \$10,000.
- Poggemeyer Design Group is responsible for the administration of the contract while Boulevard Strategies is primarily responsible for the contents of this report (but see disclaimer on page 3).

BOULEVARD STRATEGIES' RECENT MAIN STREET/ COMMERCIAL CORRIDOR MARKET STUDIES

- Akron/Kenmore Boulevard*	- Lima/Downtown
- Campus Partners/University District	- Marysville/Uptown*
- Canal Winchester/Downtown	- Newark/Downtown
- Capitol South/Downtown Columbus	- Oberlin/Downtown
- Circleville/Downtown	- Reynoldsburg/Main Street
- Cleveland/Downtown Arcades	- Rickenbacker/Restaurant Feasibility
- Cleveland/Larchmere Boulevard	- Short North Business Association/High Street
- Columbus/Neighborhood Revitalization Districts	- St. Clairsville/Downtown
- Elyria/Downtown	- Steubenville/Downtown
- Eric, PAI Little Italy District*	- Toledo/Monroe Street, Lagrange Street*
- Evendale/Commercial Corridors*	- Trotwood/Main Street
- Gahanna/Downtown/Creekside	- Upper Arlington/Kingsdale, Others
- Galion/New Commercial Corridor*	- Urbana/Downtown
- Grandview Heights/Grandview Avenue	- Westerville/South State Street
- Grove City/Downtown (Underway)	- Worthington/Downtown
- Hicksville/Downtown	- West Virginia Department of Transportation/ Economic Impact of Proposed Bridge/Including Analysis of Gaming Issues)*
- Huntington, WV/Downtown	
- Lancaster/Downtown*	

*Worked with Poggemeyer Design Group planning consultants

DOWNTOWN WILMINGTON REVITALIZATION PLAN MARKET ANALYSIS 2008

I. INTRODUCTION

A. Project Background (Cont'd)

- Boulevard Strategies is a Columbus-based economic development and land use planning firm that specializes in market analysis.
 - Boulevard Strategies, as shown in facing exhibit, has completed market studies for over 40 Main Streets and other commercial districts and corridors throughout the state (we often partner with Poggemeyer Design Group).
- The objectives of this market analysis includes the following:
 - Analysis of current business mix in Downtown Wilmington and economic environment in which they operate.
 - Evaluation of market opportunities and challenges for retail, office, and residential uses in Downtown Wilmington.
 - Identification, prioritization, and development of strategies to pursue downtown's most promising market opportunities.

DOWNTOWN WILMINGTON REVITALIZATION PLAN MARKET ANALYSIS 2008

I. INTRODUCTION

B. Methodologies and Sources

- The information presented in this report was gathered from a wide variety of sources including the following:
 - Review of downtown business and property owner surveys from 2005 and 2004, focus group sessions in 2006, and results of Sugartree Street Corridor Plan in 2007.
 - Numerous newspaper/magazine articles on the Wilmington and Greater Cincinnati region.
 - Various publications, past reports, documents, and plans made available by the City of Wilmington, Clinton County, the Chamber of Commerce, and others.
 - Economic and real estate data from Ohio Department of Development, CB Richard Ellis, Marcus & Millichap, and others.
 - Demographic forecasts from Ohio Department of Development, Claritas, and U.S. Bureau of the Census.
 - Field observations collected on several visits to Downtown Wilmington and the surrounding area over the past 6 months.
- All observations herein are reliant upon and inherently limited by the nature and extent of these inputs.
- Chris Boring, the primary author of this report can be reached with questions or comments at (614)294-2072 or blvd@iwaynet.net.

CLINTON COUNTY

EMPLOYMENT BY NAICS INDUSTRIAL SECTOR

Top 10 Sectors	2006 Avg. Annual Employment	Change From 2002	2006 % to Total	2006 State Benchmark	2006 State Avg. Annual Wages/Empl.
1. Transportation/Warehousing	8,484	+625	34.7	3.2	\$39,788
2. Manufacturing	4,527	+187	18.5	15.5	\$49,655
3. Local Government	2,966	+149	12.1	10.4	\$37,810
4. Retail Trade	1,741	-370	7.1	11.7	\$23,532
5. Healthcare/Social Services	1,678	+135	6.9	12.7	\$29,568
6. Accommodation/Food Services	1,121	-137	4.6	8.2	\$12,182
7. Finance/Insurance/Real Estate	858	-106	3.5	5.7	\$50,458
8. Administrative/Waste Services	751	+34	3.1	6.0	\$25,313
9. Educational Services	510	+41	2.1	1.6	\$29,567
10. Construction	374	+24	1.5	4.4	\$41,686
Subtotal	23,010	+582	94.2	79.4	\$34,482
All Other Sectors	1,925	+151	5.8	20.6	\$48,951
TOTAL	24,935	+733	100.0	100.0	\$35,860

DOWNTOWN WILMINGTON REVITALIZATION PLAN MARKET ANALYSIS 2008

I. INTRODUCTION

C. Local Economic Conditions

- Clinton County's employment base is dominated by transportation and warehousing uses located at Wilmington Air Park, as shown in the facing exhibit.
- The flight hub employs 9,200 in sort centers, aircraft hangers, machine shops, flight training facilities, state-of-the-art control tower, and a large administration building.
- Wilmington's largest employer is ABX Air, Inc. (about 7,000 jobs), a contract freight-forwarding business that serves DHL and others at a former Air Force base.
- In May 2008, DHL announced plans to hire UPS (based in Tennessee), replacing ABX Air as its air-cargo carrier when the contract ends in August 2009.
- This is expected to cost Wilmington 7,000 good-paying jobs with benefits.
- ABX draws workers to Wilmington from 46 counties and is the largest employer in 6 of those counties.
- In the short term, it will have a devastating impact on Wilmington's local economy, including the retail and real estate markets analyzed in this report.
- In the long term, Wilmington Air Park can be expected to compete for new users.
 - But this will be difficult with troubles in the aviation industry (including soaring fuel costs) and competition from Rickenbacker (in Columbus) and from empty cargo space in Dayton and Cincinnati.
- ABX will still be Wilmington's largest employer with 1,800 workers.

DOWNTOWN WILMINGTON REVITALIZATION PLAN MARKET ANALYSIS 2008

I. INTRODUCTION

C. Local Economic Conditions (Cont'd)

- Beyond ABX, the local economy is anchored by services industries in health, education, and finance sectors.
- CMH Regional Health Center is a growing regional health care provider with headquarters at Clinton Memorial Hospital in Wilmington and 12 satellite locations throughout SW Ohio.
 - . \$20 million cancer treatment center opened in 2007.
- National Bank & Trust, headquartered in Wilmington, is using its strong credit quality to expand into suburban Cincinnati while others are mixed in foreclosure crisis.
- Wilmington is also home to several medium size and small manufacturers and serves as a commerce center for Clinton County's thousands of farms.

DOWNTOWN WILMINGTON REVITALIZATION PLAN MARKET ANALYSIS 2008

I. INTRODUCTION

C. Local Economic Conditions (Cont'd)

- Looking forward, Wilmington and Clinton County will need to rely increasingly on entrepreneurship to create new jobs.
 - From 2002 to 2006, Clinton County had 103 annual new business starts for every 1,000 existing businesses (vs. statewide ratio of 107), according to Ohio Department of Development.
 - Development of retail, restaurant, and service start-ups are particularly important for Downtown Wilmington as most chains travel in flocks to highway locations.

II. RETAIL MARKET OUTLOOK

DOWNTOWN WILMINGTON REVITALIZATION PLAN MARKET ANALYSIS 2008

II. RETAIL MARKET OUTLOOK

A. Selected Industry Trends

- Boulevard Strategies monitors the popular and trade press on an everyday basis and frequently comments on emerging retail trends in the media and at conferences.
- Here is a countdown of the selected retail development trends most likely to impact downtowns across Ohio:
 10. WIDE OPEN SPACES: Retail vacancies in Ohio remain above national average.
 - Vacancy rates run 11-12% in 3 C's, even higher elsewhere (vs. USA = 8.5%).
 - Chains engaged in games of chicken that result in empty big box stores
 - Ten largest retail chains drive 90% of suburban shopping center development.
 9. A LONG, HARD SLOG: Drug stores battle for market share block by block.
 - Move to high traffic corners staves off competition from grocers, discounters, and the Internet.
 - Buoyed by aging population, rise in RXs, and medical advances.
 - Walk-in health clinics are latest wrinkle.
 8. A GALLON OF MILK OR A GALLON OF GAS? Gas perks and "buy local" programs fuel food concepts.
 - Gasoline is loss leader for grocers.
 - Organics go mainstream while farmers markets proliferate.
 - New C-store concepts on horizon address desires for cheap gas but good food.
 7. ABLE TO LEAP TALL LANDFILLS IN A SINGLE BOUND: Wal-Mart uses super powers to combat waste.
 - Much-maligned corporate giant committed to conserving energy and reducing costs.
 - Home improvement/hardware retailers follow Wal-Mart's lead.
 - Retail developers still lag behind office/housing developers on green front.
 6. I'VE BEEN THINKIN' ABOUT BY DOORBELL: E-tailers still clicking along in decade 2.0.
 - Consistent sales growth of 20-25% per year throughout this decade.
 - Falling technology prices, wider broadband access, greater consumer acceptance, better sites, friendlier shipping and return policies, and alternative methods lure more customers.
 - Is the Internet the great equalizer? Both big and small companies find success.

DOWNTOWN WILMINGTON REVITALIZATION PLAN MARKET ANALYSIS 2008

II. RETAIL MARKET OUTLOOK

A. Selected Industry Trends (Cont'd)

5. FASHION VICTIM: The fall of the mall.
 - Women's apparel sales off by 5% in 2007; widespread store closings in 2008 follow.
 - Consolidation of department store industry reduces pool of anchors.
 - Enclosed environments create more conflict and costs than comfort and convenience.
4. ARE WE HAVING FUN YET?: The rise of the lifestyle center.
 - Lifestyle centers feature dining & entertainment in faux town center settings.
 - Fast casual, gourmet-to-go, and home entertainment options allow consumers to take away experiences.
 - The most important meal of the day - breakfast - goes upscale.
3. ALL SHOOK UP: Mixed use is first choice instead of fallback option.
 - The 3 most important variables in retail real estate: parking, parking, parking.
 - Avoid house of cards syndrome - retail must stand on its own.
 - Mixed uses add vitality around the clock and diversify long-term risk in spite of challenges.
2. THE DO-IT-FOR-ME SOCIETY: Retail economy shifts toward services.
 - Almost all USA job growth has occurred in service-producing industries over the past 10 years.
 - Mainstream retailers add related services to "product" mix.
 - Service gap bothers boomers who grew up on department store service not automation-aided self-service.
1. FIGHTING IDENTITY THEFT: Communities throughout Ohio revitalize downtowns to preserve their unique heritages and to promote their emerging assets.
 - Public/private partnerships pave the way to success.
 - Walkable mixed use developments and historic architecture create memorable town centers where in the community gathers.
 - Retail is not a catalyst, though; it must have markets to serve.

Pop-Facts: Census Demographic Overview Report

Wilmington Market Analysis

Radius 1: 69 N SOUTH ST, WILMINGTON, OH 45177-2211, aggregate

Radius 2: 69 N SOUTH ST, WILMINGTON, OH 45177-2211, aggregate

Radius 3: 69 N SOUTH ST, WILMINGTON, OH 45177-2211, aggregate

Description	0.00 - 5.00 miles		0.00 - 10.00 miles		0.00 - 15.00 miles	
	Radius 1	%	Radius 2	%	Radius 3	%
Population						
2012 Projection	18,692		32,203		69,930	
2007 Estimate	17,970		30,708		65,939	
2000 Census	16,761		28,338		59,887	
1990 Census	14,978		24,271		52,062	
Growth 1990-2000	11.90%		16.76%		15.03%	
2000 Population by Single Race Classification						
	16,761		28,338		59,887	
White Alone	15,547	92.76	26,920	95.00	57,878	96.65
Black or African American Alone	826	4.93	857	3.02	1,004	1.68
American Indian and Alaska Native Alone	36	0.21	70	0.25	168	0.28
Asian Alone	93	0.55	120	0.42	194	0.32
Native Hawaiian and Other Pacific Islander Alone	1	0.01	1	0.00	3	0.01
Some Other Race Alone	42	0.25	63	0.22	104	0.17
Two or More Races	216	1.29	307	1.08	535	0.89
2000 Population Hispanic or Latino by Origin						
	16,761		28,338		59,887	
Not Hispanic or Latino	16,630	99.22	28,151	99.34	59,500	99.35
Hispanic or Latino:	131	0.78	187	0.66	387	0.65
Mexican	55	41.98	78	41.71	165	42.64
Puerto Rican	18	13.74	29	15.51	45	11.63
Cuban	13	9.92	13	6.95	24	6.20
All Other Hispanic or Latino	45	34.35	67	35.83	153	39.53
2000 Hispanic or Latino by Single Race Class.						
	131		187		387	
White Alone	89	67.94	117	62.57	255	65.89
Black or African American Alone	5	3.82	5	2.67	5	1.29
American Indian and Alaska Native Alone	3	2.29	5	2.67	17	4.39
Asian Alone	0	0.00	0	0.00	1	0.26
Native Hawaiian and Other Pacific Islander Alone	0	0.00	0	0.00	0	0.00
Some Other Race Alone	29	22.14	46	24.60	73	18.86
Two or More Races	5	3.82	14	7.49	35	9.04
2000 Population by Sex						
	16,761		28,338		59,887	
Male	8,093	48.28	13,977	49.32	29,513	49.28
Female	8,668	51.72	14,361	50.68	30,375	50.72
Male/Female Ratio	0.93		0.97		0.97	



Pop-Facts: Census Demographic Overview Report

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Radius 3: 69 N SOUTH ST, WILMINGTON, OH 45177-2211, aggregate

Description	0.00 - 5.00 miles		0.00 - 10.00 miles		0.00 - 15.00 miles	
	Radius 1	%	Radius 2	%	Radius 3	%
2000 Population by Age	16,761		28,338		59,887	
Age 0 - 4	1,192	7.11	1,960	6.92	4,150	6.93
Age 5 - 9	1,097	6.54	1,970	6.95	4,370	7.30
Age 10 - 14	1,147	6.84	2,127	7.51	4,606	7.69
Age 15 - 17	664	3.96	1,250	4.41	2,774	4.63
Age 18 - 20	1,170	6.98	1,600	5.65	2,785	4.65
Age 21 - 24	1,042	6.22	1,491	5.26	2,779	4.64
Age 25 - 34	2,151	12.83	3,590	12.67	7,599	12.69
Age 35 - 44	2,473	14.75	4,564	16.11	9,934	16.59
Age 45 - 49	1,179	7.03	2,122	7.49	4,498	7.51
Age 50 - 54	1,035	6.18	1,856	6.55	4,030	6.73
Age 55 - 59	741	4.42	1,361	4.80	2,950	4.93
Age 60 - 64	599	3.57	1,072	3.78	2,435	4.07
Age 65 - 74	1,104	6.59	1,776	6.27	3,795	6.34
Age 75 - 84	887	5.29	1,223	4.32	2,429	4.06
Age 85 and over	281	1.68	375	1.32	753	1.26
Age 16 and over	13,105	78.19	21,867	77.16	45,818	76.51
Age 18 and over	12,662	75.54	21,031	74.21	43,988	73.45
Age 21 and over	11,492	68.56	19,431	68.57	41,203	68.80
Age 65 and over	2,272	13.56	3,375	11.91	6,977	11.65
2000 Median Age	34.62		35.40		35.89	
2000 Average Age	36.40		36.04		36.13	



Pop-Facts: Census Demographic Overview Report

Wilmington Market Analysis

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Radius 3: 69 N SOUTH ST, WILMINGTON, OH 45177-2211, aggregate

Description	0.00 - 5.00 miles		0.00 - 10.00 miles		0.00 - 15.00 miles	
	Radius 1	%	Radius 2	%	Radius 3	%
2000 Male Population by Age	8,093		13,977		29,513	
Age 0 - 4	616	7.61	1,017	7.28	2,128	7.21
Age 5 - 9	565	6.98	1,013	7.25	2,202	7.46
Age 10 - 14	628	7.76	1,142	8.17	2,383	8.07
Age 15 - 17	351	4.34	651	4.66	1,428	4.84
Age 18 - 20	572	7.07	799	5.72	1,418	4.80
Age 21 - 24	510	6.30	742	5.31	1,378	4.67
Age 25 - 34	1,043	12.89	1,766	12.64	3,742	12.68
Age 35 - 44	1,226	15.15	2,263	16.19	4,967	16.83
Age 45 - 49	583	7.20	1,063	7.61	2,237	7.58
Age 50 - 54	516	6.38	953	6.82	2,014	6.82
Age 55 - 59	350	4.32	674	4.82	1,475	5.00
Age 60 - 64	285	3.52	527	3.77	1,203	4.08
Age 65 - 74	448	5.54	778	5.57	1,738	5.89
Age 75 - 84	333	4.11	490	3.51	989	3.35
Age 85 and over	66	0.82	97	0.69	210	0.71
2000 Median Age, Male	32.71		34.19		35.16	
2000 Average Age, Male	34.48		34.74		35.11	
2000 Female Population by Age	8,668		14,361		30,375	
Age 0 - 4	576	6.65	943	6.57	2,022	6.66
Age 5 - 9	531	6.13	957	6.66	2,168	7.14
Age 10 - 14	519	5.99	985	6.86	2,223	7.32
Age 15 - 17	313	3.61	598	4.16	1,346	4.43
Age 18 - 20	598	6.90	800	5.57	1,366	4.50
Age 21 - 24	532	6.14	749	5.22	1,401	4.61
Age 25 - 34	1,108	12.78	1,824	12.70	3,857	12.70
Age 35 - 44	1,247	14.39	2,301	16.02	4,967	16.35
Age 45 - 49	596	6.88	1,059	7.37	2,261	7.44
Age 50 - 54	519	5.99	902	6.28	2,016	6.64
Age 55 - 59	391	4.51	688	4.79	1,475	4.86
Age 60 - 64	314	3.62	545	3.80	1,232	4.06
Age 65 - 74	656	7.57	998	6.95	2,057	6.77
Age 75 - 84	554	6.39	733	5.10	1,441	4.74
Age 85 and over	214	2.47	278	1.94	543	1.79
2000 Median Age, Female	36.26		36.41		36.62	
2000 Average Age, Female	38.19		37.32		37.12	



Prepared On: Mon Feb 18, 2008 Page 3 Of 11

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Prepared For: NJK

Claritas Tech Support: 1 800 866 6511

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Prepared By:

CLARITAS
MARKETPLACE

Pop-Facts: Census Demographic Overview Report

Wilmington Market Analysis

Radius 1: 69 N SOUTH ST, WILMINGTON, OH 45177-2211, aggregate

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Description	0.00 - 5.00 miles		0.00 - 10.00 miles		0.00 - 15.00 miles	
	Radius 1	%	Radius 2	%	Radius 3	%
2000 Population Age 15+ by Marital Status	13,352		22,325		46,702	
Total, Never Married	3,481	26.07	5,146	23.05	9,759	20.90
Married, Spouse present	6,945	52.01	12,976	58.12	28,090	60.15
Married, Spouse absent	426	3.19	615	2.75	1,267	2.71
Widowed	1,001	7.50	1,336	5.98	2,851	6.10
Divorced	1,499	11.23	2,252	10.09	4,735	10.14
Males, Never Married	1,847	13.83	2,795	12.52	5,404	11.57
Previously Married	921	6.90	1,462	6.55	3,072	6.58
Females, Never Married	1,634	12.24	2,351	10.53	4,355	9.33
Previously Married	1,808	13.54	2,459	11.01	5,197	11.13
2000 Population Age 25+ by Educational Attainment	10,463		17,990		38,332	
Less than 9th grade	434	4.15	751	4.17	1,932	5.04
Some High School, no diploma	1,039	9.93	1,847	10.27	4,532	11.82
High School Graduate (or GED)	4,097	39.16	7,345	40.83	16,162	42.16
Some College, no degree	2,423	23.16	3,964	22.03	7,786	20.31
Associate Degree	619	5.92	1,136	6.31	2,321	6.05
Bachelor's Degree	1,123	10.73	1,897	10.54	3,689	9.62
Master's Degree	490	4.68	728	4.05	1,386	3.62
Professional School Degree	129	1.23	213	1.18	372	0.97
Doctorate Degree	109	1.04	110	0.61	151	0.39
Households						
2012 Projection	7,617		12,565		26,920	
2007 Estimate	7,275		11,900		25,150	
2000 Census	6,683		10,809		22,412	
1990 Census	5,781		9,008		18,720	
Growth 1990-2000	15.60%		19.99%		19.72%	
2000 Households by Household Type	6,683		10,809		22,412	
Family Households	4,356	65.18	7,709	71.32	16,682	74.43
Nonfamily Households	2,327	34.82	3,100	28.68	5,731	25.57
2000 Group Quarters Population	820		828		1,078	
2000 Households Hispanic or Latino	40	0.60	53	0.49	111	0.50



Pop-Facts: Census Demographic Overview Report

Wilmington Market Analysis

Radius 1: 69 N SOUTH ST, WILMINGTON, OH 45177-2211, aggregate

Radius 2: 69 N SOUTH ST, WILMINGTON, OH 45177-2211, aggregate

Radius 3: 69 N SOUTH ST, WILMINGTON, OH 45177-2211, aggregate

Description	0.00 - 5.00 miles		0.00 - 10.00 miles		0.00 - 15.00 miles	
	Radius 1	%	Radius 2	%	Radius 3	%
2000 Households by Household Size	6,683		10,809		22,412	
1-person household	1,979	29.61	2,598	24.04	4,794	21.39
2-person household	2,258	33.79	3,742	34.62	7,815	34.87
3-person household	1,055	15.79	1,843	17.05	4,027	17.97
4-person household	898	13.44	1,668	15.43	3,600	16.06
5-person household	347	5.19	673	6.23	1,510	6.74
6-person household	96	1.44	190	1.76	454	2.03
7 or more person household	50	0.75	94	0.87	213	0.95
2000 Average Household Size	2.39		2.55		2.62	
2000 Households by Household Income	6,673		10,803		22,298	
Income Less than \$15,000	1,091	16.35	1,472	13.63	2,835	12.71
Income \$15,000 - \$24,999	975	14.61	1,354	12.53	2,768	12.41
Income \$25,000 - \$34,999	928	13.91	1,501	13.89	3,037	13.62
Income \$35,000 - \$49,999	1,273	19.08	2,120	19.62	4,335	19.44
Income \$50,000 - \$74,999	1,271	19.05	2,349	21.74	5,191	23.28
Income \$75,000 - \$99,999	745	11.16	1,268	11.74	2,495	11.19
Income \$100,000 - \$149,999	261	3.91	499	4.62	1,148	5.15
Income \$150,000 - \$249,999	103	1.54	192	1.78	389	1.74
Income \$250,000 - \$499,999	25	0.37	39	0.36	79	0.35
Income \$500,000 or more	2	0.03	8	0.07	21	0.09
2000 Average Household Income	\$46,457		\$49,879		\$51,072	
2000 Median Household Income	\$39,044		\$42,599		\$43,681	
2000 Per Capita Income	\$18,948		\$19,332		\$19,257	
2000 Household Type, Presence of Own Children	6,683		10,809		22,412	
Single Male Householder	753	11.27	1,072	9.92	2,068	9.23
Single Female Householder	1,226	18.35	1,527	14.13	2,726	12.16
Married-Couple Family, own children	1,410	21.10	2,715	25.12	6,015	26.84
Married-Couple Family, no own children	1,923	28.77	3,507	32.45	7,635	34.07
Male Householder, own children	149	2.23	258	2.39	569	2.54
Male Householder, no own children	110	1.65	183	1.69	374	1.67
Female Householder, own children	530	7.93	698	6.46	1,328	5.93
Female Householder, no own children	234	3.50	349	3.23	761	3.40
Nonfamily, Male Householder	200	2.99	301	2.78	587	2.62
Nonfamily, Female Householder	148	2.21	201	1.86	350	1.56



Prepared On: Mon Feb 18, 2008 Page 5 Of 11

Project Code: 071-0626

Prepared For: NJK

Claritas Tech Support: 1 800 866 6511

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Prepared By:

CLARITAS
MARKETPLACE

Pop-Facts: Census Demographic Overview Report

Wilmington Market Analysis

Radius 1: 69 N SOUTH ST, WILMINGTON, OH 45177-2211, aggregate

Radius 2: 69 N SOUTH ST, WILMINGTON, OH 45177-2211, aggregate

Radius 3: 69 N SOUTH ST, WILMINGTON, OH 45177-2211, aggregate

Description	0.00 - 5.00 miles		0.00 - 10.00 miles		0.00 - 15.00 miles	
	Radius 1	%	Radius 2	%	Radius 3	%
2000 Households by Presence of People	6,683		10,809		22,412	
Households with 1 or more People under Age 18:						
Married-Couple Family	1,467	21.95	2,843	26.30	6,335	28.27
Other Family, Male Householder	163	2.44	284	2.63	632	2.82
Other Family, Female Householder	578	8.65	774	7.16	1,497	6.68
Nonfamily, Male Householder	23	0.34	41	0.38	103	0.46
Nonfamily, Female Householder	5	0.07	9	0.08	15	0.07
Households no People under Age 18:						
Married-Couple Family	1,865	27.91	3,379	31.26	7,315	32.64
Other Family, Male Householder	96	1.44	157	1.45	311	1.39
Other Family, Female Householder	186	2.78	273	2.53	592	2.64
Nonfamily, Male Householder	929	13.90	1,331	12.31	2,552	11.39
Nonfamily, Female Householder	1,369	20.48	1,719	15.90	3,060	13.65
2000 Households by Number of Vehicles	6,683		10,809		22,412	
No Vehicles	616	9.22	742	6.86	1,305	5.82
1 Vehicle	2,414	36.12	3,167	29.30	5,884	26.25
2 Vehicles	2,562	38.34	4,522	41.84	9,223	41.15
3 Vehicles	741	11.09	1,657	15.33	4,162	18.57
4 Vehicles	297	4.44	545	5.04	1,273	5.68
5 or more Vehicles	53	0.79	176	1.63	557	2.49
2000 Average Number of Vehicles	1.69		1.89		2.02	
2000 Families by Poverty Status	4,337		7,707		16,619	
Income At or Above Poverty Level:						
Married-Couple Family, own children	1,511	34.84	2,903	37.67	6,323	38.05
Married-Couple Family, no own children	1,797	41.43	3,249	42.16	6,997	42.10
Male Householder, own children	143	3.30	258	3.35	586	3.53
Male Householder, no own children	104	2.40	150	1.95	284	1.71
Female Householder, own children	318	7.33	480	6.23	1,007	6.06
Female Householder, no own children	159	3.67	212	2.75	494	2.97
Income Below Poverty Level:						
Married-Couple Family, own children	50	1.15	93	1.21	216	1.30
Married-Couple Family, no own children	44	1.01	101	1.31	217	1.31
Male Householder, own children	5	0.12	6	0.08	49	0.29
Male Householder, no own children	11	0.25	17	0.22	26	0.16
Female Householder, own children	185	4.27	217	2.82	387	2.33
Female Householder, no own children	11	0.25	22	0.29	34	0.20



Pop Facts: Census Demographic Overview Report

Wilmington Market Analysis

Radius 1: 69 N SOUTH ST, WILMINGTON, OH 45177-2211, aggregate

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Radius 3: 69 N SOUTH ST, WILMINGTON, OH 45177-2211, aggregate

Description	0.00 - 5.00 miles		0.00 - 10.00 miles		0.00 - 15.00 miles	
	Radius 1	%	Radius 2	%	Radius 3	%
2000 Population Age 16+ by Employment Status	13,113		21,922		45,759	
In Armed Forces	4	0.03	13	0.06	39	0.09
Civilian - Employed	8,568	65.34	14,482	66.06	30,011	65.58
Civilian - Unemployed	459	3.50	687	3.13	1,276	2.79
Not in Labor Force	4,082	31.13	6,740	30.75	14,433	31.54
2000 Civilian Employed Pop. Age 16+ by Occupation	8,568		14,482		30,011	
Management, Business and Financial Operations	1,026	11.97	1,762	12.17	3,446	11.48
Professional and Related Occupations	1,351	15.77	2,113	14.59	4,137	13.78
Service	1,242	14.50	1,947	13.44	3,979	13.26
Sales and Office	2,077	24.24	3,499	24.16	7,328	24.42
Farming, Fishing and Forestry	36	0.42	85	0.59	188	0.63
Construction, Extraction, and Maintenance	808	9.43	1,620	11.19	3,488	11.62
Production, Transportation, and Material Moving	2,028	23.67	3,455	23.86	7,445	24.81
2000 Pop. Age 16+ by Occupation Classification	8,568		14,482		30,011	
Blue Collar	2,836	33.10	5,076	35.05	10,932	36.43
Service and Farm	1,358	15.85	2,287	15.79	4,662	15.53
White Collar	4,374	51.05	7,119	49.16	14,417	48.04
2000 Workers Age 16+, Transportation To Work	8,374		14,222		29,372	
Drove Alone	6,656	79.48	11,628	81.76	24,233	82.50
Car Pooled	951	11.36	1,479	10.40	3,083	10.50
Public Transportation	67	0.80	87	0.61	129	0.44
Walked	443	5.29	485	3.41	736	2.51
Motorcycle	0	0.00	11	0.08	18	0.06
Bicycle	5	0.06	5	0.04	9	0.03
Other Means	10	0.12	24	0.17	88	0.30
Worked at Home	243	2.90	502	3.53	1,076	3.66
2000 Workers Age 16+ by Travel Time to Work	8,132		13,720		28,296	
Less than 15 Minutes	4,232	52.04	5,514	40.19	8,821	31.17
15 - 29 Minutes	1,966	24.18	4,387	31.98	9,878	34.91
30 - 44 Minutes	825	10.15	1,852	13.50	5,072	17.92
45 - 59 Minutes	635	7.81	1,092	7.96	2,493	8.81
60 or more Minutes	473	5.82	876	6.38	2,034	7.19
2000 Average Travel Time to Work in Minutes	22.01		24.55		27.15	



Pop-Facts: Census Demographic Overview Report

Wilmington Market Analysis

Radius 1: 69 N SOUTH ST, WILMINGTON, OH 45177-2211, aggregate

Radius 2: 69 N SOUTH ST, WILMINGTON, OH 45177-2211, aggregate

Radius 3: 69 N SOUTH ST, WILMINGTON, OH 45177-2211, aggregate

Description	0.00 - 5.00 miles		0.00 - 10.00 miles		0.00 - 15.00 miles	
	Radius 1	%	Radius 2	%	Radius 3	%
2000 Tenure of Occupied Housing Units	6,683		10,809		22,412	
Owner Occupied	3,961	59.27	7,354	68.04	16,532	73.76
Renter Occupied	2,722	40.73	3,455	31.96	5,880	26.24
2000 Occ Housing Units, Avg Length of Residence	9		10		11	
2000 Tenure By Age of Householder	6,683		10,808		22,404	
Owner Occupied	3,969		7,354		16,500	
Householder 15 to 24 Years	39	0.98	81	1.10	262	1.59
Householder 25 to 34 Years	411	10.36	894	12.16	2,021	12.25
Householder 35 to 44 Years	920	23.18	1,778	24.18	4,010	24.30
Householder 45 to 54 Years	953	24.01	1,704	23.17	3,802	23.04
Householder 55 to 59 Years	361	9.10	664	9.03	1,591	9.64
Householder 60 to 64 Years	186	4.69	430	5.85	1,200	7.27
Householder 65 to 74 Years	580	14.61	982	13.35	2,016	12.22
Householder 75 to 84 Years	462	11.64	711	9.67	1,347	8.16
Householder 85 and over	58	1.46	110	1.50	253	1.53
Renter Occupied	2,714		3,455		5,903	
Householder 15 to 24 Years	386	14.22	455	13.17	749	12.69
Householder 25 to 34 Years	714	26.31	893	25.85	1,524	25.82
Householder 35 to 44 Years	474	17.46	716	20.72	1,285	21.77
Householder 45 to 54 Years	413	15.22	536	15.51	902	15.28
Householder 55 to 59 Years	140	5.16	184	5.33	284	4.81
Householder 60 to 64 Years	146	5.38	176	5.09	272	4.61
Householder 65 to 74 Years	168	6.19	185	5.35	332	5.62
Householder 75 to 84 Years	170	6.26	187	5.41	378	6.40
Householder 85 and over	103	3.80	121	3.50	176	2.98



Pop-Facts: Census Demographic Overview Report

Wilmington Market Analysis

Radius 1: 69 N SOUTH ST, WILMINGTON, OH 45177-2211, aggregate

Radius 2: 69 N SOUTH ST, WILMINGTON, OH 45177-2211, aggregate

Radius 3: 69 N SOUTH ST, WILMINGTON, OH 45177-2211, aggregate

Description	0.00 - 5.00 miles		0.00 - 10.00 miles		0.00 - 15.00 miles	
	Radius 1	%	Radius 2	%	Radius 3	%
2000 Pop 65 and over by HH Type and Relationship						
Total for Pop 65 and over	2,270		3,386		6,969	
In Households:	2,167		3,283		6,693	
In Family Households:	1,303	57.40	2,183	64.47	4,622	66.32
Householder	727	32.03	1,218	35.97	2,509	36.00
Male	594	26.17	1,025	30.27	2,085	29.92
Female	133	5.86	193	5.70	424	6.08
Spouse	489	21.54	825	24.37	1,709	24.52
Parent	69	3.04	96	2.84	192	2.76
Other Relatives	5	0.22	23	0.68	178	2.55
Nonrelatives	13	0.57	21	0.62	35	0.50
In Non-Family Households:	864	38.06	1,100	32.49	2,071	29.72
Male householder	124	5.46	198	5.85	468	6.72
Living Alone	124	5.46	191	5.64	438	6.28
Not Living Alone	0	0.00	7	0.21	30	0.43
Female Householder	740	32.60	894	26.40	1,556	22.33
Living Alone	724	31.89	877	25.90	1,526	21.90
Not Living Alone	15	0.66	16	0.47	31	0.44
Nonrelatives	0	0.00	8	0.24	47	0.67
In Group Quarters:	103		103		276	
Institutionalized population	103	4.54	103	3.04	273	3.92
Noninstitutionalized population	0	0.00	0	0.00	3	0.04
2000 All Owner-Occupied Housing Values						
	3,969		7,354		16,500	
Value Less than \$20,000	149	3.75	252	3.43	598	3.62
Value \$20,000 - \$39,999	107	2.70	245	3.33	618	3.75
Value \$40,000 - \$59,999	253	6.37	448	6.09	1,106	6.70
Value \$60,000 - \$79,999	694	17.49	1,112	15.12	2,582	15.65
Value \$80,000 - \$99,999	797	20.08	1,336	18.17	3,064	18.57
Value \$100,000 - \$149,999	1,271	32.02	2,257	30.69	4,602	27.89
Value \$150,000 - \$199,999	321	8.09	867	11.79	1,919	11.63
Value \$200,000 - \$299,999	289	7.28	588	8.00	1,338	8.11
Value \$300,000 - \$399,999	35	0.88	98	1.33	312	1.89
Value \$400,000 - \$499,999	20	0.50	50	0.68	155	0.94
Value \$500,000 - \$749,999	21	0.53	58	0.79	111	0.67
Value \$750,000 - \$999,999	1	0.03	9	0.12	28	0.17
Value \$1,000,000 or more	11	0.28	34	0.46	66	0.40
2000 Median All Owner-Occupied Housing Value	\$99,599		\$106,300		\$103,063	



Pop-Facts: Census Demographic Overview Report

Wilmington Market Analysis

Radius 1: 69 N SOUTH ST, WILMINGTON, OH 45177-2211, aggregate

Radius 2: 69 N SOUTH ST, WILMINGTON, OH 45177-2211, aggregate

Radius 3: 69 N SOUTH ST, WILMINGTON, OH 45177-2211, aggregate

Description	0.00 - 5.00 miles		0.00 - 10.00 miles		0.00 - 15.00 miles	
	Radius 1	%	Radius 2	%	Radius 3	%
2000 Housing Units by Units in Structure	7,225		11,615		23,956	
1 Unit Attached	64	0.89	85	0.73	182	0.76
1 Unit Detached	4,768	65.99	8,450	72.75	18,567	77.50
2 Units	288	3.99	330	2.84	657	2.74
3 to 19 Units	1,448	20.04	1,513	13.03	1,938	8.09
20 to 49 Units	81	1.12	84	0.72	226	0.94
50 or More Units	220	3.04	227	1.95	339	1.42
Mobile Home or Trailer	355	4.91	922	7.94	2,037	8.50
Boat, RV, Van, etc	0	0.00	0	0.00	13	0.05
2000 Housing Units by Year Built	7,225		11,615		23,956	
Housing Units Built 1999 to March 2000	194	2.69	342	2.94	718	3.00
Housing Unit Built 1995 to 1998	657	9.09	1,320	11.36	2,533	10.57
Housing Unit Built 1990 to 1994	606	8.39	1,016	8.75	2,144	8.95
Housing Unit Built 1980 to 1989	662	9.16	1,086	9.35	2,199	9.18
Housing Unit Built 1970 to 1979	982	13.59	1,637	14.09	3,898	16.27
Housing Unit Built 1960 to 1969	977	13.52	1,289	11.10	2,560	10.69
Housing Unit Built 1950 to 1959	925	12.80	1,254	10.80	2,413	10.07
Housing Unit Built 1940 to 1949	508	7.03	697	6.00	1,430	5.97
Housing Unit Built 1939 or Earlier	1,713	23.71	2,971	25.58	6,064	25.31
2000 Median Year Structure Built**	1965		1967		1968	
2000 Average Contract Rent	\$377		\$373		\$356	

**1939 will appear when at least half of the Housing Units in this reports area were built in 1939 or earlier.



Pop-Facts: Census Demographic Overview Report

Wilmington Market Analysis

Appendix: Area Listing

Area Name:

Type: Radius 1

Reporting Detail: Aggregate

Reporting Level: Block Group

Radius Definition:

69 N SOUTH ST
WILMINGTON, OH 45177-2211

Latitude/Longitude 39.446188 -83.828712

Radius 0.00 - 5.00

Area Name:

Type: Radius 2

Reporting Detail: Aggregate

Reporting Level: Block Group

Radius Definition:

69 N SOUTH ST
WILMINGTON, OH 45177-2211

Latitude/Longitude 39.446188 -83.828712

Radius 0.00 - 10.00

Area Name:

Type: Radius 3

Reporting Detail: Aggregate

Reporting Level: Block Group

Radius Definition:

69 N SOUTH ST
WILMINGTON, OH 45177-2211

Latitude/Longitude 39.446188 -83.828712

Radius 0.00 - 15.00

Project Information:

Site: 7

Order Number: 966325327



Prepared On: Mon Feb 18, 2008 Page 11 Of 11

Project Code: 071-0626

Prepared For: NJK

Claritas Tech Support: 1 800 866 6511

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Prepared By:

**CLARITAS
MARKETPLACE**

DOWNTOWN WILMINGTON REVITALIZATION PLAN MARKET ANALYSIS 2008

II. RETAIL MARKET OUTLOOK

B. Local Demographic and Spending Patterns

- This section of the report examines local demographic and retail spending patterns at several levels of geography, as follows:
 - The City of Wilmington.
 - The remainder of Clinton County.
 - Clinton County total.
 - 5-mile radius from Downtown Wilmington.
 - 10-mile radius from Downtown Wilmington.
 - 15-mile radius from Downtown Wilmington.
 - The State of Ohio (as a comparison benchmark).
- Radii data were examined as many retailers use standardized rings to screen potential locations before investigating further.
- Retail dollars do not necessarily respect municipal boundaries.

WILMINGTON, OHIO POPULATION AND HOUSEHOLD TRENDS

CITY AND COUNTY

Population	City of Wilmington**	Remainder of Clinton County	Clinton County	State of Ohio
1990 Census	11,421	23,994	35,415	10,847,115
2000 Census	11,921	28,622	40,543	11,353,140
2007 Estimated	12,565	30,564	43,129	11,491,243
CAGR*, 1990-2007	0.7%	1.6%	1.4%	0.3%
Density Per Square Mile, 2007	130	97	105	281
Households				
1990 Census	4,519	8,519	13,038	4,087,546
2000 Census	4,867	10,549	15,416	4,445,773
2007 Estimated	5,211	11,455	16,666	4,578,456
CAGR*, 1990-2007	1.0%	2.0%	1.7%	0.7%
Avg. HH Size, 2000	2.28	2.65	2.56	2.49
% Family Households, 2000	60.2	75.7	71.8	67.3
% Married w/Child(ren), 2000	18.0	36.7	32.0	22.4
% 1-Person Households, 2000	33.7	20.4	23.7	27.3
% Single Parent Families, 2000	12.1	8.4	9.3	9.3

*Compound Annual Growth Rate

**2000 Boundaries

SOURCES: Claritas, Inc., U.S. Census Bureau and Boulevard Strategies

DOWNTOWN WILMINGTON REVITALIZATION PLAN MARKET ANALYSIS 2008

II. RETAIL MARKET OUTLOOK

B. Local Demographic and Spending Patterns (Cont'd)

POPULATION AND HOUSEHOLD TRENDS/CITY AND COUNTY

- The City of Wilmington has an estimated population of about 12,500 persons in 5,200 households.
 - Slow but steady population and household growth (90 persons, 50 households per year).
 - Low population density (less than half of the state average).
 - Below-average percentage of single parent families.
- Clinton County has an estimated 43,000 persons in 16,700 households.
 - Over 70% of county's population lives outside of Wilmington.
 - Townships and villages are growing at a much faster pace than the county seat (280 persons, 130 households per year).
 - Very high percentage of family households, particularly traditional households with father, mother, and at least one child, are in outlying region.
- Population/household growth forecast could vary widely depending on impact of DHL job losses
 - Prior to announcements, Wilmington was expected to grow to about 13,000 persons in 5,400 households by 2012, according to Claritas.
 - Clinton County was expected to reach 45,000 persons in 17,500 households.

WILMINGTON, OHIO POPULATION AND HOUSEHOLD TRENDS

RETAIL MARKET RADII*

Population	5-Mile Radius	10-Mile Radius	15-Mile Radius	State of Ohio
1990 Census	14,978	24,271	52,062	10,847,115
2000 Census	16,761	28,338	59,887	11,353,140
2007 Estimated	17,970	30,708	65,939	11,491,243
CAGR*, 1990-2007	1.0%	1.6%	1.7%	0.3%
Density Per Square Mile, 2007	229	98	93	281
Households				
1990 Census	5,781	9,008	18,720	4,087,546
2000 Census	6,683	10,809	22,412	4,445,773
2007 Estimated	7,275	11,900	25,150	4,578,456
CAGR*, 1990-2007	1.5%	1.9%	2.1%	0.7%
Avg. HH Size, 2000	2.39	2.35	2.62	2.49
% Family Households, 2000	65.2	71.3	74.4	67.3
% Married w/Child(ren), 2000	21.1	25.1	26.8	22.4
% 1-Person Households, 2000	29.6	24.0	21.4	27.3
% Single Parent Families, 2000	10.2	8.9	8.5	9.3

*Compound Annual Growth Rate

SOURCES: Claritas, Inc., U.S. Census Bureau and Boulevard Strategies

WILMINGTON, OHIO AGE AND MARITAL STATUS

CITY AND COUNTY

Age Distribution, 2000	City of Wilmington	Remainder of Clinton County	Clinton County	State of Ohio
0-17 Years	23.7%	27.3%	26.4%	25.4%
18-24 Years	15.8%	8.3%	10.2%	9.3%
25-44 Years	27.3%	29.7%	29.1%	29.3%
45-64 Years	19.2%	23.1%	22.1%	22.7%
65+ Years	14.0%	11.6%	12.2%	13.3%
TOTAL	100.0%	100.0%	100.0%	100.0%
Median Age			35.3	36.2
Marital Status, 2000 (Population, 15+)				
Never Married	29.5%	68.3%	22.0%	26.2%
Married	49.0%	64.5%	60.6%	56.0%
Divorced	12.9%	10.0%	10.7%	10.7%
Widowed	8.6%	6.0%	6.6%	7.1%
TOTAL	100.0%	100.0%	100.0%	100.0%

*2000 Boundaries

DOWNTOWN WILMINGTON REVITALIZATION PLAN MARKET ANALYSIS 2008

II. RETAIL MARKET OUTLOOK

B. Local Demographic and Spending Patterns (Cont'd)

AGE AND MARITAL STATUS/CITY AND COUNTY

- Because of Wilmington College, the City of Wilmington has a very large 18-24 year-old cohort (16% vs. 9% statewide).
 - Typical Wilmington resident is 4 years younger than typical Ohio resident.
 - Less than half of Wilmington's population 15 and older is married (vs. 56% statewide).
 - Wilmington has high % of individuals who never-married, divorced, and have become widows/widowers.
- Clinton County's age distribution is roughly in line with the statewide distribution.
 - However, high percentages of children (0-17) in the villages/townships skew the median age down somewhat for the county.
 - Nearly 65% of individuals age 15 and older that live outside of Wilmington are currently married.
- There is a high proportion of young single adults within 5 miles of downtown Wilmington versus primarily young families beyond and out to 15 miles.

WILMINGTON, OHIO EDUCATION, INCOME, AND OCCUPATION

CITY AND COUNTY

2000 Level of Education (Adults 25 Years +)	City of Wilmington*	Remainder of Clinton County	Clinton County	State of Ohio
High School Grad +	85.0%	82.5%	83.1%	83.0%
Some College/Assoc. Degree +	45.5%	39.5%	41.0%	46.9%
Bachelors Degree +	16.4%	13.3%	14.1%	21.1%
Graduate Degree +	6.7%	4.2%	4.8%	7.4%
2007 Household Income Distribution				
Less Than \$25,000	31.1%	21.5%	23.9%	25.2%
\$25,000-\$49,999	34.6%	32.7%	33.2%	30.7%
\$50,000-\$74,999	19.3%	24.9%	23.5%	21.7%
\$75,000-\$99,999	10.1%	12.8%	12.1%	14.9%
\$100,000+	4.9%	8.1%	7.3%	7.5%
TOTAL	100.0%	100.0%	100.0%	100.0%
Median Household Income	\$40,111	\$46,788	\$44,653	\$45,194
Per Capita Income	\$20,017	\$20,928	\$21,231	\$24,153
2000 Occupation Type				
White Collar	48.8%	46.5%	47.1%	56.9%
Blue Collar	51.2%	53.5%	52.9%	43.1%
TOTAL	100.0%	100.0%	100.0%	100.0%

*2000 Boundaries

DOWNTOWN WILMINGTON REVITALIZATION PLAN MARKET ANALYSIS 2008

II. RETAIL MARKET OUTLOOK

B. Local Demographic and Spending Patterns (Cont'd)

EDUCATION, INCOME AND OCCUPATION/CITY AND COUNTY

- The City of Wilmington largely consists of blue collar households on tight budgets.
 - The percentage of adults with a high school diploma/associate's degree is close to or above the statewide average.
 - . They are less likely to earn bachelors degree (16% vs. 21% statewide).
 - Slight majority work in blue collar (including services) occupations (51% vs. 43% statewide).
 - Student population skews median household income downward (estimated about \$40,000 in 2007 vs. \$45,000 statewide).
 - . However, Boulevard Strategies estimates that the City of Wilmington's median household income would only improve to \$40,750 if student households are taken out.
 - . Per capita income, the primary determinant of discretionary retail spending power, trails the statewide average by 17%.
- The remainder of Clinton County is even more blue collar than the City of Wilmington.
 - Only 14% of adults have college educations and over 53% have blue collar jobs.
 - But those households outside of the city have much higher incomes (15% higher, on average) than Wilmington residents.
 - . Due to a high number of children, per capita income is still below the state average in the county.

WILMINGTON, OHIO EDUCATION, INCOME, AND OCCUPATION

RETAIL MARKET RADII

2000 Level of Education (Adults 25 Years +)	5-Mile Radius	10-Mile Radius	15-Mile Radius	State of Ohio
High School Grad +	85.9%	85.6%	83.1%	83.0%
Some College/Assoc. Degree +	47.8%	44.7%	41.0%	46.9%
Bachelors Degree +	17.7%	16.4%	14.6%	21.1%
Graduate Degree +	7.0%	5.8%	5.0%	7.4%
2007 Household Income Distribution				
Less Than \$25,000	26.9%	22.8%	21.9%	25.2%
\$25,000-\$49,999	32.8%	32.6%	32.1%	30.7%
\$50,000-\$74,999	20.3%	23.3%	24.6%	21.7%
\$75,000-\$99,999	12.1%	13.0%	12.7%	14.9%
\$100,000+	7.7%	8.3%	8.7%	7.5%
TOTAL	100.0%	100.0%	100.0%	100.0%
Median Household Income	\$42,606	\$45,859	\$46,884	\$45,194
Per Capita Income	\$21,790	\$22,232	\$22,146	\$24,153
2000 Occupation Type				
White Collar	51.1%	49.1%	48.0%	56.9%
Blue Collar	48.9%	50.9%	52.0%	43.1%
TOTAL	100.0%	100.0%	100.0%	100.0%

DOWNTOWN WILMINGTON REVITALIZATION PLAN MARKET ANALYSIS 2008

II. RETAIL MARKET OUTLOOK

B. Local Demographic and Spending Patterns (Cont'd)

EDUCATION, INCOME, AND OCCUPATION/RETAIL MARKET RADII

- Interestingly, levels of education among adults decrease, while household income increases the further from Downtown Wilmington households are located.
 - Those adults within 5-Mile radius are more likely than the typical Ohio adult to have earned a high school diploma but less likely to hold a college degree.
 - Per capita income is close to \$22,000 per year for all radii (vs. \$24,000 statewide).
 - Employment opportunities are increasingly blue collar the further from Wilmington households locate (52% blue collar in 15-Mile radius vs. 43% statewide).
- Income levels will be impacted by DHL job losses.

DOWNTOWN WILMINGTON REVITALIZATION PLAN MARKET ANALYSIS 2008

II. RETAIL MARKET OUTLOOK

B. Local Demographic and Spending Patterns (Cont'd)

RETAIL SPENDING PATTERNS

- Boulevard Strategies has developed a proprietary model that estimates a given population's retail spending on 28 retail categories split into 5 major merchandise groups.
 - Convenience goods and services consist of categories for which most households seek convenience in terms of location, drive-thrus, hours, and other such factors.
 - This includes grocery, pharmacy/health & beauty aids, retail services (such as dry cleaners and hair salons), cards/gifts, and fast food.
 - Spending in this group is most influenced by household income, household size, and age distribution.
 - Home Goods consists of products relating to the home, both inside and outside.
 - This includes home furnishings/décor (including art), household items, appliances, hardware/paint/home improvement, lawn and garden, and auto/office supply.
 - Spending in this group is most influenced by household growth, housing tenure, turnover ratio, and average valuations.
 - Fashion Goods consists of products that are worn by consumers.
 - This includes women's, men's and children's apparel, footwear, jewelry and specialty fashion (which includes everything from fashion eyewear to work and sports uniforms to costumes).
 - Spending in this group is most influenced by age distribution, occupation, and household income.

DOWNTOWN WILMINGTON REVITALIZATION PLAN MARKET ANALYSIS 2008

II. RETAIL MARKET OUTLOOK

B. Local Demographic and Spending Patterns (Cont'd)

RETAIL SPENDING PATTERNS (CONT'D)

- Leisure Goods consists of products that relate to shoppers' leisure activities.
 - . This includes consumer electronics (including computers/cell phones), sporting goods, books/magazines, toy/hobby/crafts, median/software, pets, and other miscellaneous categories.
 - . Spending on each merchandise line in this group is driven by different demographic and lifestyle variables.
- Dining and entertainment venues are unique in that their products and services are generally consumed on the premises of the retailers.
 - . This includes sit-down restaurants, taverns and bars, nightclubs, cinemas, bowling alleys, game arcades, and specialty foods/dessert shops (including coffee and ice cream).
 - . Spending in this group is driven by household income and composition, and age distribution.
- The retail spending patterns model is based on the U.S. Department Labor's Annual Consumer Expenditure Survey
 - . Independent variables include region of the country, household type and composition, household size, household tenure, age, race, and education of householder, housing value distribution, household income distribution.
 - . It does not include automotive-related retail such as motor vehicle sales, gasoline, and auto repairs.

RETAIL SPENDING PATTERNS CITY OF WILMINGTON

+

CONVENIENCE GOODS AND SERVICES	
\$50 MILLION	
- Grocery	+
- Pharmacy/HBA	-
- Retail Services	0
- Cards/Gifts	0
- Fast Food	+

Wilmington
48%

U.S.
45%

0

DINING AND ENTERTAINMENT	
\$12 MILLION	
- Sit-Down Restaurants/Bars	0
- Cinemas	0
- Bowling Alleys/Arcades	0
- Specialty Foods/Desserts	+

Wilmington
11%

U.S.
11%

0

LEISURE GOODS	
\$11 MILLION	
- Consumer Electronics	+
- Sporting Goods	+
- Media/Software	+
- Toys/Hobby	-
- Pets	-
- Miscellaneous	0

Wilmington
10%

U.S.
9%

Wilmington
15%

U.S.
21%

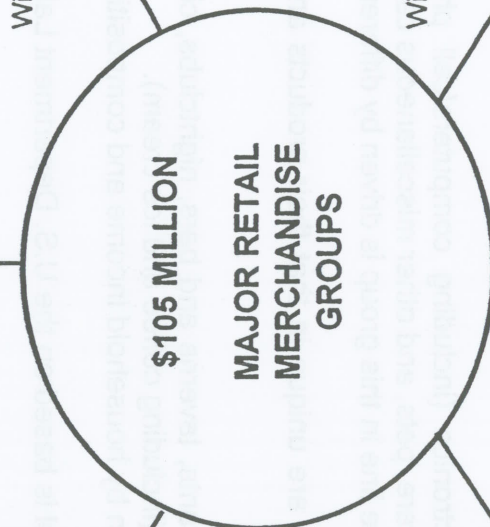
HOME GOODS	
\$15 MILLION	
- Home Furnishings/Décor	-
- Household Items	-
- Appliances	-
- Hardware/Paint	-
- Lawn and Garden	-
- Auto Supply	-

+

FASHION GOODS	
\$17 MILLION	
- Women's Apparel	+
- Men's Apparel	0
- Children's Apparel	0
- Footwear	0
- Jewelry	-
- Specialty Fashion	0

Wilmington
16%

U.S.
14%



SPENDING AS PROPORTION OF
HOUSEHOLD INCOME

+ Above-Average Spending

0 Average Spending

- Below-Average Spending

DOWNTOWN WILMINGTON REVITALIZATION PLAN MARKET ANALYSIS 2008

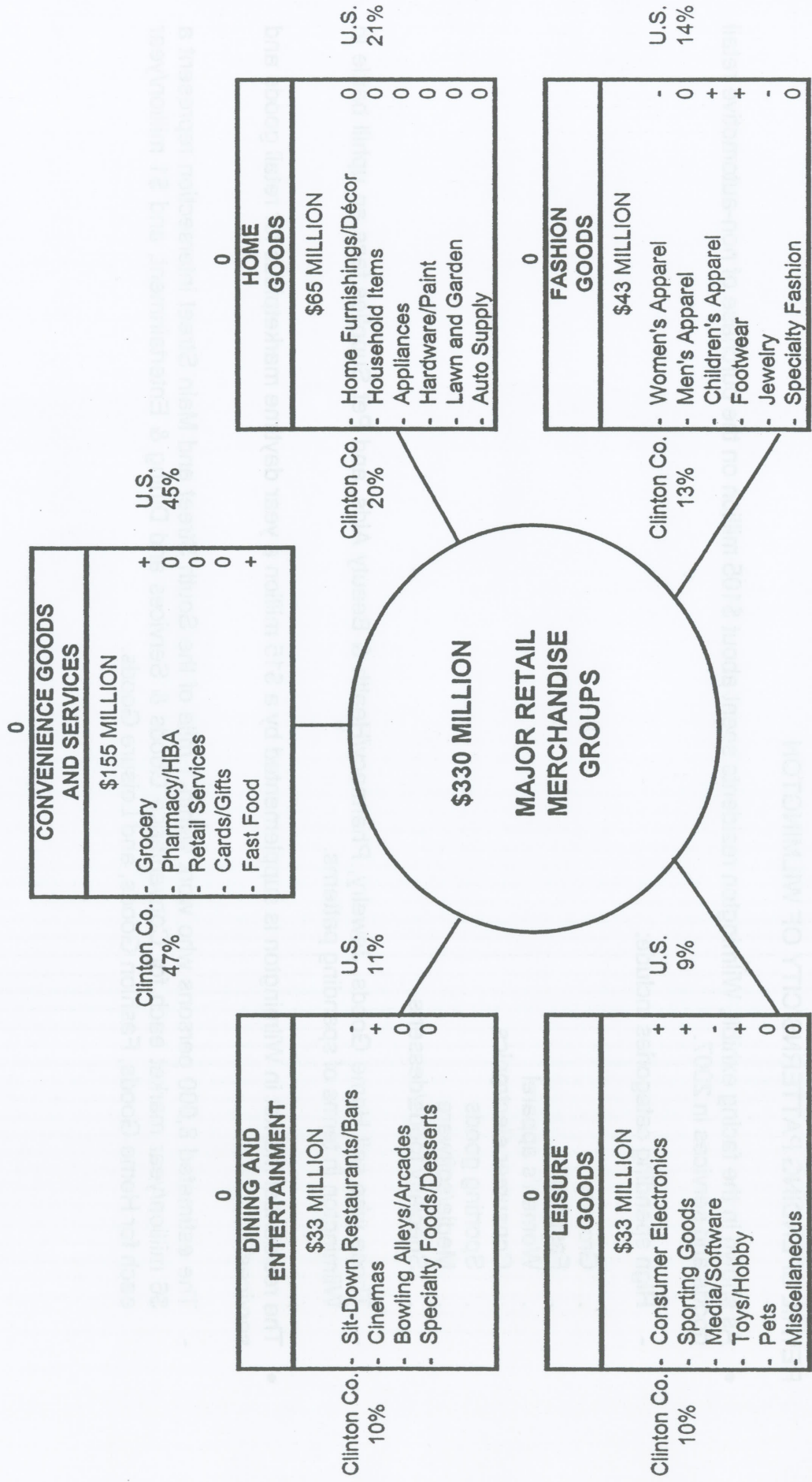
II. RETAIL MARKET OUTLOOK

B. Local Demographic and Spending Patterns (Cont'd)

RETAIL SPENDING PATTERNS/CITY OF WILMINGTON

- As shown in the facing exhibit, Wilmington residents spent about \$105 million on the purchase of non-automotive retail goods and services in 2007.
 - High spending categories include:
 - Grocery
 - Fast food
 - Women's apparel
 - Consumer electronics
 - Sporting goods
 - Media/software
 - Specialty foods/desserts
 - Those who sell Home Goods, Jewelry, Pharmacy/Health & Beauty Aids, and Pet Supplies face an uphill battle in Wilmington in terms of spending patterns.
- The residential market in Wilmington is supplemented by a \$15 million a year daytime marketplace for retail goods and services.
 - The estimated 8,000 persons who work within 1 mile of the South Street and Main Street intersection represent a \$6 million/year market each for Convenience Goods & Services and Dining & Entertainment, and \$1 million/year each for Home Goods, Fashion Goods, and Leisure Goods.

RETAIL SPENDING PATTERNS CLINTON COUNTY



DOWNTOWN WILMINGTON REVITALIZATION PLAN MARKET ANALYSIS 2008

II. RETAIL MARKET OUTLOOK

B. Local Demographic and Spending Patterns (Cont'd)

RETAIL SPENDING PATTERNS/CLINTON COUNTY

- As shown in the facing exhibit, residents of Clinton County spent about \$330 million on the purchase of retail goods and services in 2007.
 - High spending categories Include:
 - Grocery
 - Fast food
 - Children's apparel
 - Footwear
 - Consumer electronics
 - Sporting goods
 - Toys/hobby
 - Cinemas
 - Categories with below-average spending include:
 - Jewelry
 - Women's apparel
 - Media/software
 - Sit-down restaurants/bars
- This is enough spending to support about 1.3 million square feet of retail space if all outflow spending could be captured.

RETAIL SPENDING PATTERNS RETAIL MARKET RADII

	5-Mile Radius	10-Mile Radius	15-Mile Radius
Convenience Goods & Services	\$85M	\$130M	\$275M
Home Goods	\$25M	\$50M	\$120M
Fashion Goods	\$25M	\$40M	\$80M
Leisure Goods	\$20M	\$30M	\$65M
Dining & Entertainment	\$20M	\$30M	\$60M
TOTAL	\$175M	\$280M	\$600M

SOURCE: Boulevard Strategies

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DOWNTOWN WILMINGTON REVITALIZATION PLAN MARKET ANALYSIS 2008

II. RETAIL MARKET OUTLOOK

B. Local Demographic and Spending Patterns (Cont'd)

RETAIL SPENDING PATTERNS/RETAIL MARKET RADII

- 5-mile ring residents spent about \$175 million on retail purchases in 2007.
- This is enough to support about 700,000 square feet of retail space.
- Those with 10 miles of downtown Wilmington collectively spent about \$280 million on retail goods and services in 2007.
- This more than doubles to \$600 million in the 15-mile ring, enough to support 2.4 million square feet of retail space.
- 15-mile ring retail demand has been growing by about \$20 million per year, enough to support up to 80,000 square feet of new retail space each year if it could all be captured in Clinton County.

CLINTON AND ADJACENT COUNTIES

Counties	Clinton	Brown	Clermont	Fayette	Greene	Highland	Warren	All Adjacent
Est. 2004 Population	42,280	44,239	188,614	28,134	152,233	42,610	645,176	189,256
% Change vs. 2000	4.3	4.6	6.0	(1.1)	2.9	4.2	19.4	9.0
Pop./Square Mile	103	90	417	69	367	77	473	237
Est. 2004 Households	15,416	15,555	86,013	11,054	55,312	15,587	55,966	239,487
% Owner-Occupied	68.9	79.6	75.0	66.6	69.7	75.3	78.5	74.3
% Adults w/College Degree	14.1	8.8	21.0	10.7	31.3	9.7	28.4	22.6
2004 Med. HH Income	\$40,467	\$38,303	\$49,286	\$36,735	\$48,656	\$35,313	\$57,952	\$49,825
2004 Retail Spending Power	\$310M	\$310M	\$1,680M	\$130M	\$1,400M	\$280M	\$1,900M	\$5,700M
Avg. Drive Time to Work	24m	35m	28m	24m	20m	29m	24m	25m
% Tax Base, Residential	62	73	75	60	77	67	81	76
% Tax Base, Agricultural	15	16	2	19	4	19	4	9
County Seat	Wilmington	Georgetown	Batavia	Washington C.H.	Xenia	Hillsboro	Lebanon	-
Distance from Wilmington	0m	43m	35m	22m	18m	22m	22m	-

SOURCES: Wilmington/Clinton County Chamber of Commerce and Boulevard Strategies

DOWNTOWN WILMINGTON REVITALIZATION PLAN MARKET ANALYSIS 2008

II. RETAIL MARKET OUTLOOK

B. Local Demographic and Spending Patterns (Cont'd)

ADJACENT COUNTIES

- Clinton County shares its borders with 6 Ohio counties:
 - Greene to the North
 - Fayette to the Northwest
 - Highland to the Southeast
 - Brown and Clermont to the South
 - And Warren to the Southwest
- These 6 counties have a combined population of about 650,000 persons, or 15 persons for every resident of Clinton County.
 - Warren, Clermont, and Greene are suburban bedroom communities while Brown, Fayette, and Highland are located in outlying rural areas.
 - As previously mentioned, Clinton is in transition from rural to suburban.
- Clinton's adjacent counties represent a large \$5.7 billion a year in market potential for destination retailers and restaurants in Downtown Wilmington.

WILMINGTON SHOPPING CENTERS

Name/Address	Year Built	Sq. Ft.	Anchor(s)
Wilmington Square S.R. 73 & Rombach Avenue	2001	229,000	Wal-Mart Supercenter
Meadow Park Plaza Rombach Avenue & Carrier Drive	1989	145,000	Kroger, Staples
Wilmington Plaza 1268 Rombach Avenue	1962	144,000	Big Lots, Ace Hardware, Cinemas
Southridge Shopping Center U.S. 68 South	1977	95,000	Community Market
Rombach Center 1359 Rombach Avenue	1985	32,000	CVS Pharmacy
TOTAL/WEIGHTED AVERAGE	1985	645,000	

SOURCES: National Research Bureau, Inc. and Boulevard Strategies

DOWNTOWN WILMINGTON REVITALIZATION PLAN MARKET ANALYSIS 2008

II. RETAIL MARKET OUTLOOK

C. Local Retail Supply Analysis

- As shown in the facing exhibit, Wilmington has 5 shopping centers that are at least 30,000 square feet in size.
 - The largest and newest is Wilmington Square, anchored by a Wal-Mart Supercenter, opened in 2001 near Wilmington Air Park on the western edge of town.
 - Also 3 other centers and numerous freestanding retailers are located along Rombach Avenue, the City's main retail corridor.
 - An interesting shopping center lies on south end of town (Southridge S.C.) anchored by a grocery co-op.
- Clinton County/Wilmington residents currently spend about 1 of every 2 retail dollars outside of the county.
 - Clinton County is served by about 800,000 square feet of occupied retail space.
 - This includes 5 shopping centers, miscellaneous freestanding retail (including Lowe's) on major thoroughfares (Rombach Avenue, South Street, I-71 Exit, etc.), a new Kroger in Blanchester, and Downtown Wilmington.
 - At least 20% of support for these businesses are generated by inflow of spending from highway travelers, residents of contiguous counties to the East (without Wal-Marts), and visitors.

DOWNTOWN WILMINGTON REVITALIZATION PLAN MARKET ANALYSIS 2008

II. RETAIL MARKET OUTLOOK

C. Local Retail Supply Analysis (Cont'd)

- Clinton County and Wilmington are generally under-stored - residents must leave county to meet full range of retail needs.
 - However, competition outside of county includes several strong retail clusters:
 - Prime Outlets in Jeffersonville (20 miles/25 minutes from Wilmington) includes a Who's Who of 100 top name brand fashion retailers at deeply discounted prices.
 - The Mall at Fairfield Commons and The Greene, upscale mall/lifestyle retail in Beavercreek (30 miles/40 minutes away).
 - Complete range of big boxes and chain stores/restaurants in Fields-Ertel corridor in Northern Cincinnati (35 miles/45 minutes away).
 - Quaint downtown retail in Lebanon, including Golden Lamb Restaurant (25 miles/30 minutes away), antiques in Waynesville (15 miles/20 minutes away), and art galleries in Mason (30 miles/35 minutes away).

III. OFFICE AND HOUSING MARKET OUTLOOK

III. OFFICE AND HOUSING MARKET OUTLOOK

A. Selected Office Industry Trends

- Boulevard Strategies works with economic development professionals and commercial developers throughout the State of Ohio on an ongoing basis.
 - Here is a countdown of ten selected office development trends most likely to impact downtowns across Ohio:
10. IT'S THE ECONOMY: Office vacancies on the rise again after a period of stability.
 - Vacancy rates in most Ohio markets melted away as obsolete office space is converted and spec space is avoided.
 - Lack of job growth in Ohio dampens future office demand.
 - Finance/Insurance/Real Estate (F/I/RE) flickers out in the wake of a housing slump.
 9. THE RISE OF THE CREATIVE CLASS: The best and the brightest thrive in lively, mixed-use settings.
 - Today's workers try to avoid 5-story "cubicle farms" in isolated office parks.
 - 3 R's - restaurants, retail, and recreation - provide key off-site amenities.
 - Hotel and conference facilities and public green spaces attract headquarters operations.
 8. CYBER SPACE TURNS HIERARCHY VIRTUALLY UPSIDE DOWN: Latest technology trumps biggest office.
 - Team spaces, high tech conference rooms, and open designs replace the coveted corner office.
 - 5 office workers per 1,000 square feet becoming the norm vs. 4 in the past.
 - Developers seek greater efficiency of land just as companies seek greater efficiency of space.
 7. JUST DO IT: Savvy employers offer flexibility to boost work productivity.
 - Flex-time, job-sharing, telecommuting, and hoteling reduce demand for dedicated offices.
 - Going mobile - to-go technology frees workers from their desks at times
 - Outsource or add overhead? It's an easy choice if not a core competency.

DOWNTOWN WILMINGTON REVITALIZATION PLAN MARKET ANALYSIS 2008

III. OFFICE AND HOUSING MARKET OUTLOOK

A. Selected Office Industry Trends (Cont'd)

6. ZERO COMMUTE TIME: Work/live spaces gain popularity beyond creative community.
 - Home offices/studios suit freelancers, consultants, semi-retirees in white collar occupations.
 - Support services and third places are key to nurturing lone practitioners
 - If not work and live in same place, more business owners seek office locations closer to residence to reduce commutes.
5. WITH A LITTLE HELP FROM MY FRIENDS...: Entrepreneurs share space, ideas, and dreams.
 - Office suites deliver just-in-time support for sales reps and corporate expatriates.
 - Business incubators and micro loan programs provide start-ups with necessities.
 - Some communities sponsor business idea contests where winner receives seed money as the prize.
4. HOW DOES IT FEEL?: Medical office segment shines as boomers age.
 - Site selection is driven by patient demographics, relationships with local hospitals, and complimentary practices.
 - Medical/healing/fitness uses are increasingly co-locating with traditional retailers.
 - Office condos are particularly well-suited to medical/dental practitioners.
3. BEST FOOT FORWARD: Communities use limited resources to target selected industry clusters.
 - Avoid the Noah's Ark approach and focus on unique assets.
 - Think vertical (i.e., supply chains), not just horizontal/complimentary.
 - Find out why companies decided on your town and promote those benefits to prospects.
2. NEW MORNING: Top priorities shift in the new millennium for office users.
 - Cheap dedicated parking is coveted.
 - Post 9/11 era heightens safety/security concerns.
 - Green is good - LEED designation counts as seal of approval.
1. OPEN ARMS: Cities chase economic development ever more vigorously.
 - Downtown development groups better staffed/organized than ever.
 - Shift from property tax abatements to income tax relief packages.
 - TIFs are an increasingly popular way to finance infrastructure improvements.

DOWNTOWN WILMINGTON REVITALIZATION PLAN MARKET ANALYSIS 2008

III. OFFICE AND HOUSING MARKET OUTLOOK

B. Selected Housing Industry Trends

- Boulevard Strategies compiles market studies involving demographic and housing data in urban communities, including downtowns throughout the state of Ohio.

- Here is a countdown of ten housing development trends most likely to downtown's across Ohio:

10. SUBPRIME SPILLOVER: Problems in suburban single family sector impact overall housing industry in Ohio.

- Empty nesters stuck in the suburbs but are expected to leave in droves once market corrects itself.
- Rent-to-Own: Land contracts may be solution for sellers who want to move and buyers with damaged credit
- Stable markets are positioned to benefit from lower interest rates.

9. MY CITY WAS GONE: Suburban sprawl threatens Ohio's way of life.

- Back to the future: Traditional neighborhood design guidelines spark new urbanism movement.
- Sea change is occurring as even suburbs embrace urban options.
- Walkable + Bikable = Likable.

8. THE NEW STARTER HOMES: Condo craze sweeps urban areas, including downtowns.

- Condos double share of new housing market over past 10 years.
- Prices typically 2/3 of single family homes in same neighborhood.
- Resale market alive and well in spite of building boom.

7. WHEN I'M 64: Boomers become seniors.

- In denial: 850,000 Ohioans will reach retirement age over next 5 years but many won't really retire.
- Record \$\$\$ spent on plastic surgery, vitamins and supplements, hair color, Botox, and Viagra.
- Pets gain status as full-fledged family members, especially for empty nesters.

6. OVERLOOKED SEGMENT: Unmarried women are fastest growing group of home-buyers.

- Singles in 30s/40s not waiting to get married to buy first house.
- Money changes everything as college-educated women earn more than ever.
- Choosy about amenities but security and low maintenance are most valued.

III. OFFICE AND HOUSING MARKET OUTLOOK

B. Selected Housing Industry Trends (Cont'd)

5. UPWARD BOUND: Today's renters by choice are tomorrow's owners.
 - Apartment market runs counter to for-sale market.
 - Millennials seek affordability, green space, and coolness.
 - "Lifestyle" renters now comprise 15% of market as apartment sizes grow.
4. BOOMTOWN USA: Housing follows jobs in exurbia.
 - God's country: executives escape to hinterlands despite long commutes.
 - Extended stay apartments appeal to company town executives on the move.
 - Community colleges open new branches to facilitate lifelong learning.
3. GRAY POWER: "They'll have to take me out first."
 - Most seniors wish to age in place as community and family ties deepen over time.
 - Service co-ops allow seniors to pool resources needed to stay independent.
 - Be All You Can Be: The all-volunteer army of seniors is simply amazing.
2. DOWNTOWN BELONGS TO EVERYONE: Diversity is downtown's middle name.
 - All are welcome regardless of age, race/ethnicity, sexual orientation, income, politics, or religion,
 - A hand up: communities dilute pockets of poverty with market-rate/public housing mixes.
 - The mommy niche: new initiatives carefully target mothers and their children.
1. THIS IS YOUR HOMETOWN: Public policy leverages private investments in housing stock.
 - Historic tax credits preserve past while building for the future.
 - Improving image of downtowns may be Main Street program's greatest achievement so far.
 - Sustainability is next frontier for success.

DOWNTOWN WILMINGTON REVITALIZATION PLAN MARKET ANALYSIS 2008

III. OFFICE AND HOUSING MARKET OUTLOOK

C. Local Office Market

- Based on local employment statistics, Boulevard Strategies estimates that there is currently about 1 million square feet of occupied office space in Clinton County, including government, Wilmington College, ABX Headquarters, and other private companies.
 - There are numerous vacant spaces on the upper floors of multi-story buildings of downtown Wilmington.
- There is no evidence to support need for more office space in near future.
 - Wilmington is still a blue collar town and it is about to lose its largest employer.
 - This business incubator may be productive way to use space that would otherwise be empty.
- An exception may be medical office due to growth of hospital.
 - Downtown is within 1 mile of the hospital.
 - Also, courthouse attracts legal services uses.

WILMINGTON, OHIO TRANSPORTATION AND HOUSING PATTERNS

CITY AND COUNTY

Transportation, 2000	City of Wilmington*	Remainder of Clinton County	Clinton County	State of Ohio
Avg. Vehicles Per Household	1.5	2.0	1.9	1.8
Avg. Travel Time to Work	20.5M	27.4M	25.7M	24.8M
% Worked at Home	2.8	3.7	3.5	2.8
% Drive Alone to Work	77.9	83.2	81.9	82.8
Housing, 2000				
% Owner-Occupied	50.7	74.6	68.9	69.1
Avg. Length of Residence	9	12	11	12
% Detached Single Family Units	59.7	77.2	72.9	67.4
Median Year Structure Built	1962	1967	1966	1962
% Pre 1960 Construction	47.0	42.6	43.7	47.1

*2000 Boundaries

SOURCES: Claritas, Inc., U.S. Census Bureau and Boulevard Strategies

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DOWNTOWN WILMINGTON REVITALIZATION PLAN MARKET ANALYSIS 2008

III. OFFICE AND HOUSING MARKET OUTLOOK

D. Local Housing Market

- The City of Wilmington has a fairly transient population.
 - This, again, is influenced by student population.
 - 800 of Wilmington College's 1,200 residents live in on-campus dormitories.
 - Nearly half of all housing units are renter-occupied.
 - Wilmington residents tend to live close to workplace (within 20 minutes).
 - Therefore, it is less reliant on automobiles than most communities.
- Remainder of Clinton County has high rate of home ownership (77% vs. 67% statewide).
 - Housing stock is 5 years newer than statewide average.
 - Long average commute times as many township residents drive to Cincinnati, Dayton, or Columbus for work.

WILMINGTON HOUSING MARKET

OPPORTUNITIES AND CHALLENGES

Strengths	Challenges
• Wilmington College and Its Associated Cultural Programs • Local Park and Bike Trail System • Clinton Memorial Hospital • Compact Scale of City • Lack of Crime • Historic Architecture in Downtown	• Negative Perception of School District • Higher Tax Burden Than Townships/Villages • Lack of Upscale Housing - Is There Really a Market For It, Though? • Need For More Housing Options - Especially Condos, Townhomes, Lofts, Live/Work Units • Need for Better Connection Between Downtown and College • City Not Perceived to Be Developer-Friendly • Too Many Rental Units/Conversions

SOURCE: McKenna Associates, Inc., Summary of Housing Focus Group Issues, January 2007

DOWNTOWN WILMINGTON REVITALIZATION PLAN MARKET ANALYSIS 2008

III. OFFICE AND HOUSING MARKET OUTLOOK

D. Local Housing Market (Cont'd)

- Wilmington's comprehensive plan in 2005 included an analysis of local housing market conditions and reached the following conclusions and recommendations:
 - For-sale market is suffering from sluggish demand.
 - Focus on locals already here to become homeowners versus trying to attract outsiders.
 - Overabundance of rental properties must be addressed.
 - Convert single family rental houses back to ownership market.
 - Step up demolitions/code enforcement of blighted properties.
 - Upgrade remaining rentals.
 - Many of these units are located in or near downtown.
 - New senior housing options needed as baby boomers become seniors.
 - This plan was written prior to statewide foreclosure crisis and DHL announcement.

27-4000000000

Source: Data from Wilmington and Berks County

	2000	2001	2002
TOTAL	100,000	100,000	100,000
Vehicle Rental Services	15	15	15
Food & Beverage	15	15	15
Dining & Entertainment	8	8	8
Recreation Services	15	15	15
Home Goods	15	15	15
Convenience Goods & Services	30	30	30
Health Maintenance Group	15	15	15

IV. DOWNTOWN WILMINGTON

DOWNTOWN WILMINGTON

CHARTER THERAPY

CURRENT RETAIL MIX

DOWNTOWN WILMINGTON

<u>Retail Merchandise Group</u>	<u># of Store</u>	<u>Est. Sq. Ft.</u>	<u>% to Total</u>
Convenience Goods & Services	20	50,000	31.3%
Home Goods	7	15,000	9.4%
Fashion/Leisure Goods	14	30,000	18.7%
Dining & Entertainment	9	25,000	15.6%
Subtotal	51	120,000	75.0%
Vacant 1st Floor Spaces	12	40,000	25.0%
TOTAL	63	160,000	100.0%

SOURCE: Main Street Wilmington and Boulevard Strategies

DOWNTOWN WILMINGTON REVITALIZATION PLAN MARKET ANALYSIS 2008

IV. DOWNTOWN WILMINGTON

A. Retail Mix

- Downtown Wilmington's retail mix is balanced between Convenience Goods and Services that target close-in residents and workers and destination businesses that draw beyond Clinton County.
 - Convenience offers includes an independent pharmacy, retail services, and cards/gifts/flowers.
 - Remainder of mix anchored by home furnishings, antiques, and arts and crafts,.
 - Limited restaurant selection includes Jen's Uptown Deli (located inside of Books 'N' More), Mediterranean Restaurant & Café, and the General Denver Hotel (including Sunday brunch for nearby churchgoers).
 - . There are several Chinese, Mexican, pizza, and barbeque restaurants in the local area but none downtown.
- Retail vacancy rate of 25% double the Cincinnati market's average of 12%.
 - Vacancies slowly increasing over past 3 years after dropping below 5% according to Main Street Wilmington.
 - Large furniture store closed this year.
- Downtown Wilmington has several resale retail businesses.
 - Nationally, resale retail industry is growing at 5%/year pace vs. 4% for all retail.
 - . Goodwill, the industry leader, is growing at 9%/year pace.
 - Resale, including antiques, is the ultimate in recycling.

DOWNTOWN WILMINGTON REVITALIZATION PLAN MARKET ANALYSIS 2008

IV. DOWNTOWN WILMINGTON

A. Retail Mix (Cont'd)

- Nearly all of downtown Wilmington's retailers and restaurants are independently owned and operated.
- Main Street Wilmington is working with Wilmington College to present a series of free entrepreneurial training workshops.
- Successful Main Streets are more driven by development and nurturing of entrepreneurs than recruitment/expansion of existing businesses in competing locations.
- Superior, personal customer service remains the independents' top competitive advantage.
- Boulevard Strategies estimates that downtown Wilmington generates roughly \$30 million in retail sales per year, based on analysis of current mix.
- About 50% (\$15 million) is generated by Wilmington residents and workers, another 20% (\$6 million) by other Clinton County residents, and the remainder, \$9 million, by visitors and tourists.
- This translates into a 12-13% market share for Wilmington's retail market and 2-3% of outlying Clinton County's retail spending.

DOWNTOWN WILMINGTON REVITALIZATION PLAN MARKET ANALYSIS 2008

IV. DOWNTOWN WILMINGTON

B. Non-Retail Uses

- Like most successful downtowns, Downtown Wilmington includes a diverse mix of uses beyond retail shops and restaurants that draw traffic, including:
 - The historic 800 seat Murphy Theatre and many other historic buildings.
 - Fife & Bosworth building recently named as one of Heritage Ohio's Top 10 preservation opportunities.
 - Several beautiful large churches, including St. Columbkille Catholic Church and the United Methodist Church.
 - Wilmington Public Library (not well integrated with other uses in Downtown).
 - Clinton County Courthouse, County and City Administration offices.
 - Lodging at General Denver Hotel, Effie's Bed & Breakfast and Convention and Visitors Bureau.
 - Numerous legal, medical, financial and other professional services practices.
 - Various non-profit and social services agencies.
 - Also within 1 mile of Wilmington College and Clinton Memorial Hospital.
- Main Street Wilmington hosts a variety of promotions and events in downtown throughout the year.
- These include the brown bag lunch series at the Murphy Theatre, a Jazz & Wine Concert series, Saturday's farmer markets, summer sidewalk sales, holiday open houses, parades, banana split festivals, and other events such as Harry Potter night.

VISION 2010: A VISION OF DOWNTOWN WILMINGTON IN THE YEAR 2010

Alive-Lively-Vibrant

- A downtown alive with visual, literary, and performing arts.

Downtown Housing

- A downtown with a wide range of housing types and capability to attract a variety of different residents.

Diversity

- A downtown that attracts a variety of uses, people, entertainment, and activities; a downtown that plays many roles as a center of commerce, and social activity in the City of Wilmington.

Accessible Physically & Psychologically

- A downtown that is inviting and easy to get into and around in by pedestrians, bicyclists, and vehicular modes of transportation.

Safety & Security

- A downtown that is safe and secure, day and night.

Image of Downtown

- A downtown with a reputation to be proud of -- a confident "Micropolitan" county seat with a unique and attractive business and residential environment.

Physical Environment

- A downtown with clean surroundings, green space and excellence in historic architecture and urban design.

SOURCE: Main Street Wilmington

DOWNTOWN WILMINGTON REVITALIZATION PLAN MARKET ANALYSIS 2008

IV. DOWNTOWN WILMINGTON

C. Key Downtown Issues

- Main Street Wilmington surveyed 30 downtown business and property owners in 2005.
- 10 key issues identified include:
 - Difficult parking.
 - Too much truck traffic (by-pass is planned).
 - Lack of retail draws/foot traffic.
 - Poor property maintenance.
 - Vandalism/loitering youths/unruly bars.
 - Competition from Wal-Mart/shopping centers on Rombach.
 - Store hours in the evenings.
 - Streetscape maintenance/litter/snow removal.
 - Potential loss of more downtown businesses.
 - 28% are not likely to stay in downtown over next 5 years.
 - More events are needed to raise awareness.
- Vision for downtown Wilmington presented in facing exhibit.

V. CONCLUSIONS

DOWNTOWN WILMINGTON REVITALIZATION PLAN MARKET ANALYSIS 2008

V. CONCLUSIONS

A. Market Opportunities and Challenges

- The loss of thousands of jobs at Wilmington Air Park casts a cloud over Wilmington's near-term future economy.
 - Loss of jobs = Loss of households/lower wages = loss of retail spending power.
 - Silver lining may be deeper pool of retail entrepreneurs ready to determine their own destinies.
 - Competition from incoming new big boxes should grind to a halt.
 - Efforts to retain existing retailers and restaurants must be re-doubled.
- Decline of local market will increase the importance of tourist trade.
 - This has already been a successful economic development strategy for downtown Wilmington.
 - Expansion of the tourist trade through more destination retail, dining and entertainment venues, and festivals and events should be pursued
- Outlook for filling upper floor spaces with housing and offices is bleak at this time.
 - Exception is the opportunity for empty-nester/senior housing in safe, pedestrian-friendly downtown.

NEW RETAIL BUSINESS IDEAS FOR DOWNTOWN WILMINGTON

Convenience Goods & Services	Fashion Goods	Dining & Entertainment
• Bakery/Pastries • Wine Shop • Dry Cleaner/Tailor • Take 'n' Bake Pizza/Pasta • Computer Repairs	• Vintage/Retro/Thrift • Used Teens • Upscale Jeans • Fashion Eyewear • More Jewelry/Beads • Bridal Shop • Cosmetic/Beauty Supplies • Outdoors Outfitter • Outlet Retail?	• Wider Variety of Sit-down Restaurants - More Ethnic Diversity - Barbeque/Southern Style - Vegetarian/Healthy • Coffee Shop • Upscale Ice Cream Parlor • Smoothies/Juice Bar • Better Music/Taverns (ala Put-In-Bay) • Sports Bar
Home Goods	Leisure Goods	
• More Arts/Crafts/Framing • More Antiques • More Country Home Décor • Candles/Aromatherapy • Wild Birds/Gardening • Consignment Furniture • Futons/RTA Furniture	• Stationery/Fine Papers • High End Pet Products • Scrapbooking Supplies • Fabrics/Knitting/Quilting Supplies/ Classes • Bicycles • Party Supplies	

SOURCE: Boulevard Strategies

DOWNTOWN WILMINGTON REVITALIZATION PLAN MARKET ANALYSIS 2008

V. CONCLUSIONS

B. Business Recruitment Strategy

- The facing exhibit lists over 35 business ideas that fit downtown Wilmington's market profile, in the consultant's opinion.
 - This list is more than enough to fill downtown's 12 vacant storefronts if enterprising entrepreneurs can be found.
 - In fact, some of the best ideas for new businesses are so creative and inspired that they will not appear on anyone's radar except their inventors'.
- All entrepreneurs should be strongly encouraged to set up an E-commerce site to test the viability of their concepts before opening storefronts.
 - Each business should identify its market positioning strategy in terms of:
 - . Core merchandise/service offer.
 - . Complimentary fringe products/services.
 - . Key target markets.
 - . Competition for key target markets.
 - . Differentiating appeals for target markets to choose their business over competition.
- Main Street Wilmington is a strong organization that is headed in the right direction, in the consultant's opinion.
 - It needs to continue to build on the its efforts to date, in the face of adversity.