Village of
West Dundee

TO: JOSEPH CAVALLARO, VILLAGE MANAGER

FROM: CATHLEEN TYMOSZENKO, COMMUNITY DEVELOPMENT DIRECTOR

SUBJECT: **RETAIL MARKET STUDY AND RECRUITMENT PROJECT**

DATE: 12/11/2014

INTRODUCTION

To assist with our efforts to identify and recruit national and regional potential retailers and restaurants, the Village Board approved the commencement of a two phase Retail Market Study and Recruitment Project and authorized a contract with Barry Bain of GRS Group in January 2014. Phase 1 consists of a Retail Market Study to map and identify national and regional retailers who are not presently operating in this market. Phase 2 consists of a Recruitment Project to work to bring identified operators to West Dundee.

BACKGROUND

The Retail Market Study was initiated in January 2014 and concluded at ICSC Dealmakers in October 2014. A phase 1 report was completed in May 2014 and is attached. The information garnered during phase 1 informed the efforts put forward in phase 2, the recruitment phase of the project.

Phase 2 recruitment efforts work involved direct contact with potential users and efforts were initiated at ReCon ICSC in Las Vegas on May 18-20th. Barry Bain was already attending this conference and worked to generate interest in West Dundee existing retail spaces and developable areas at no additional cost to the Village.

To gear up for the event and initial contact, a number of different tools were created including a general marketing brochures, targeted lists of available existing retail spaces and available properties for development, a marketing brochure to highlight the Spring Hill Market Area existing retailers and demographic information, a few different potential site plans for the redevelopment of Gateway East as designed with staff and consultant input by Rick Gilmore, architect. These site designs include alternative renditions to allow for stand alone pad ready sites and reconfigured existing spaces.

A list of target retailers and restaurants was also defined and refined. This list was developed systematically and with a great deal of analysis. Earlier drafts of this list did include more “wish list” users but some of these have been eliminated due to the application of criteria for location that cannot be met.

After the Las Vegas event, a large scale mailing was undertaken to follow up with retailers and restaurant operators. Following the mailing, phone calls and emails were sent.

The recruitment effort did identify a few potential end users interested in the market in the future including Studio Movie Grill and CVS. However, it did not identify and current potential end users. As a result, Mr. Bain has concluded that the distressed trade area is due to competing retail areas to the west and to the east, the proximity of other stores, the pressure on retailers to downsize, consolidate and discount; this situation has resulted in a lack of interest in West Dundee.

<u>RECOMMENDATION</u>

A memorandum summarizing the results of the study is attached. The project has also resulted in a few suggestions for next steps for West Dundee. These include follow up with municipal attendees at ICSC to see what benefits they realized in order to determine if future attendance would be beneficial; consider rethinking our reluctance to entertain value oriented retails; work to increase and diversity the housing market with multiple family and senior and assistance living near the mall; and consider alternative uses including housing around the mall.

GRS GROUP CENTAUR FINANCIAL ADVISORS

MEMORANDUM

RE: Retail Market Study and Recruitment Project

Overview:

GRS was engaged by the Village of West Dundee to assist in the efforts of identifying and recruiting potential retail and restaurant users for the vacant improved property (i.e. – Gateway East/West, former Best Buy and Target) and available land (principally Randall Road) for development. We commenced a two phase retail market study and recruitment project in January of this year. The initial phase involved a retail market study identifying and mapping the national and regional retailers presently in the market trade area which we had defined as a 10 mile radius from the intersection of routes 31/72. This trade area includes West Dundee, East Dundee, Carpentersville, Algonquin, Elgin, Lake in the Hills, and Hoffman Estates/Barrington. Once this portion of phase I was complete we conducted and reviewed various demographic and retail market research reports to further define the market. Several of these reports were presented to the Village Board as part of a benchmark status report.

The later part of this phase involved taking what we had learned from mapping the retail/restaurant users, reviewing the demographic/market research reports, and then identifying the potential retail/restaurant users absent in the market trade area to create a target tenant list. This resulted in a list of approx. 150 potential users.

The second phase (recruitment process) consisted of a thorough calling/e-mailing campaign directed at the potential target tenant list followed up by direct mail – letter and marketing flyer. The marketing flyer was prepared as part of this project and included an aerial of the mall and immediately surrounding market with a list of available properties for sale/lease. GRS also attended the national (May) and regional (October) ICSCs in Las Vegas and Chicago, respectively and met with various retail/restaurant users to showcase West Dundee.

Results:

Through this effort we have concluded the retail/commercial development that has occurred west along Randall Road to the north and south of West Dundee, and to the east in the vicinity of routes 59 and 72 has significantly impacted the trade area immediately surrounding Springhill Mall. In combination, both of these developed areas have the majority of the retail/restaurant users in the Chicagoland area, and unfortunately they are on the perimeter of the defined trade area for West Dundee. Secondly, in our recruitment efforts of the 150 or so prospects, feedback was basically neutral with respondents stating "no interest" in the market for no particular reason; too close to our other store(s); not expanding in Chicago at the present; our pipeline is already full for 2014/2015; not enough density within the immediate trade area to add another store.

While the economy continues to recover from the recession with new job growth, increased home prices and new housing starts, the expansion in the retail market is not as vibrant. We are still experiencing store closures, consolidation, and the discounting/the value pitch that occurred during the recession is not easily forgotten by most consumers. This all contributes to the reason for lack of interest in West Dundee, those stores that left the Springhill Mall area for Randall Road and/or Route 59/72 are struggling to sustain the volumes needed to warrant another store in such proximity.

We did have one particular case we wanted to cite – confidentially – Studio Movie Grill ("SMG") was actively pursuing the furniture space at Springhill Mall. I had meet with SMG and Rouse at the national ICSC and had subsequent conversations with both parties. Per my last conversation with SMG – they had tabled the negotiations on the Springhill Mall space because the cost to convert the space was exceedingly high and the economics became unattractive. They were only pursuing Springhill Mall because of the economics, and they perceive it could be an average-good performing theater for them. That said, they will revisit it in Q1 2015 at which time they may entertain alternative spaces outside the mall with in West Dundee.

Conclusion:

We have basically completed 100% of the project, but continue to dialogue on the behalf of the Village with various users, brokers and investors to hopefully spark some interest. With that said, I'd like to make few follow-on suggestions to assist the village in remaining proactive in pursuit of users and tenants for the community.

1. Although the Village did not participate in the Chicago ICSC regional dealmaking conference – I'd recommend a follow up with the communities that did and ask them these three questions –
    a. Why did you participate/exhibit at the Chicago ICSC?
    b. What benefit did you receive from doing so, or do you anticipate from doing so?
    c. Would you do it again?
2. While the village has seemed to be reluctant to entertain interest from value oriented retailers (i.e. – Salvation Army) – I believe the average consumers today is not as reluctant to visit those retailers and many communities have been receptive to these type uses as they cater to a critical component of a market trade area. For example you will find users like Goodwill, Salvation Army, Savers, Value City, Dollar General, etc. in and around of the more affluent communities because that is the demographic they receive many of their donations from.
3. I believe a concentrated effort should be made to diversify the housing market with multi-family and possibly senior and assisted living housing near Springhill Mall, promoting the convenience of shopping without the congestion of Randall Road.
4. Along with this, alternative uses should be considered for some of the retail/commercial land surrounding Springhill Mall. For instance, if senior housing/assisted living communities would be pursued, nearby medical office/ urgent care facilities may follow.

GRS GROUP | CENTAUR FINANCIAL ADVISORS

I still have optimism that West Dundee and the area around Springhill Mall will see a resurgence in retail/commercial activity, and GRS is committed to assisting the village in its endeavors.

Please let me know if you have any questions.

-Best

1/5/14

Village of
West Dundee

TO: JOSEPH CAVALLARO, VILLAGE MANAGER

FROM: CATHLEEN TYMOSZENKO, COMMUNITY DEVELOPMENT DIRECTOR

SUBJECT: **RETAIL MARKET STUDY AND RECRUITMENT PROJECT** CT

DATE: 5/8/2014

INTRODUCTION

To assist with our efforts to identify and recruit national and regional potential retailers and restaurants, the Village Board approved the commencement of a two phase Retail Market Study and Recruitment Project and authorized a contract with Barry Bain of GRS Group in January 2014. Phase 1 consists of a Retail Market Study to map and identify national and regional retailers who are not presently operating in this market. Phase 2 consists of a Recruitment Project to work to bring identified operators to West Dundee.

BACKGROUND

On a regular basis, we work with individual property owners and brokers to retain, recruit and secure tenants. We also work to identify and recruit desired users at large for the Village including consistently reaching out to new retailers entering the market and contacting retailers on our ongoing "wish list". To support and enhance recruitment efforts we maintain an excel sheet list of current available properties with pricing and contacts, promote the Village's economic development incentive programs, distribute special marketing materials to showcase redevelopment opportunities with combined or reconfigured sites and publish available and existing site sheet catalogs to showcase opportunities to developers and end users. These efforts are detailed in our quarterly Economic Development and Market Analysis Update: Status of Efforts to Promote Use or Reuse of Available Properties Report.

To enhance our current efforts, the Village Board authorized a two phase Retail Market Study and Recruitment Project and authorized a contract with Barry Bain of GRS Group to assist with our efforts to identify and recruit national and regional potential retailers and restaurants. The framework for this project was formulated with input from consultant Barry Bain and the project was authorized in January.

<u>Phase 1: Retail Market Study</u>

Phase 1 of the project which consists of completing a Retail Market Study to map and identify national and regional retailers who are not presently operating in this market is near to completion. To identify opportunities, several reports and a map were created for the West Dundee Retail Study Area. The reports and maps were created to show information in 1-mile; 5-mile and 10 mile radii to correspond with market areas and include the following as attached:

1. Executive Summary-Principal Demographics
2. Business Summary- Business/Employment
3. Retail Market Profile-Surplus/Leakage Report
4. Demographic and Income Profile-Detailed
5. Retail Market Potential-Compares trade area spending habits with national averages
6. Restaurant Market Potential-Compares trade area dining habits with national averages
7. Map of existing operators

From this information, trade area criteria have been analyzed for retailers in the market area. Trade area criteria varies for each user and includes minimum distance between stores; demographic profile desired by retailers including population, density and income; site requirements, including minimum and maximum square footage; desired co-tenancies; and growth plans. This exercise has allowed for a determination of which retailers/users might consider another location in West Dundee.

To further the analysis, we worked to identify former (within the last three years) retailers/users in West Dundee that have departed or relocated in the market area. This analysis assisted in formulating an understanding of current customer shopping needs and to try to determine which needs are not being met to identify patterns and opportunities for recruitment of new users. One of the more relevant reports to this end is the Retail Market Profile-Surplus/Leakage Report. This report speaks to how consumers in the market area spend money and whether they spend money inside or outside of each radii. This report identifies surpluses and leakage for each category of consumer spending. For instance for grocery the report shows that there is a surplus demand and leakage in existence that can help to justify and bolster our efforts to attract grocery users to the market. The information will be part of our package presented to grocers to give then a reason to review and heighten the interest in West Dundee beyond just a desire to have them present.

In addition, we provided the consultant with names of businesses from the Village's "wish list". The "wish list" is a continuing list of desired retailers as placed on the list by staff, elected officials and suggestions from residents and other business owners.

These exercises have led to identifying nation/regional users not presently operating in this trade area and the creation of a list of potential users. This list was then analyzed based on each retailer's trade area criterion, including demographic profile, population, density and income; site requirements, minimum and maximum square footage desired; co tenancies; and site requirements to determine probability of recruitment.

Based on probability of recruitment, a target list 130 users has been developed to allow for the study to move toward initiation of Phase 2, recruitment of identified operators to West Dundee.

<u>Phase 2: Retail Recruitment</u>

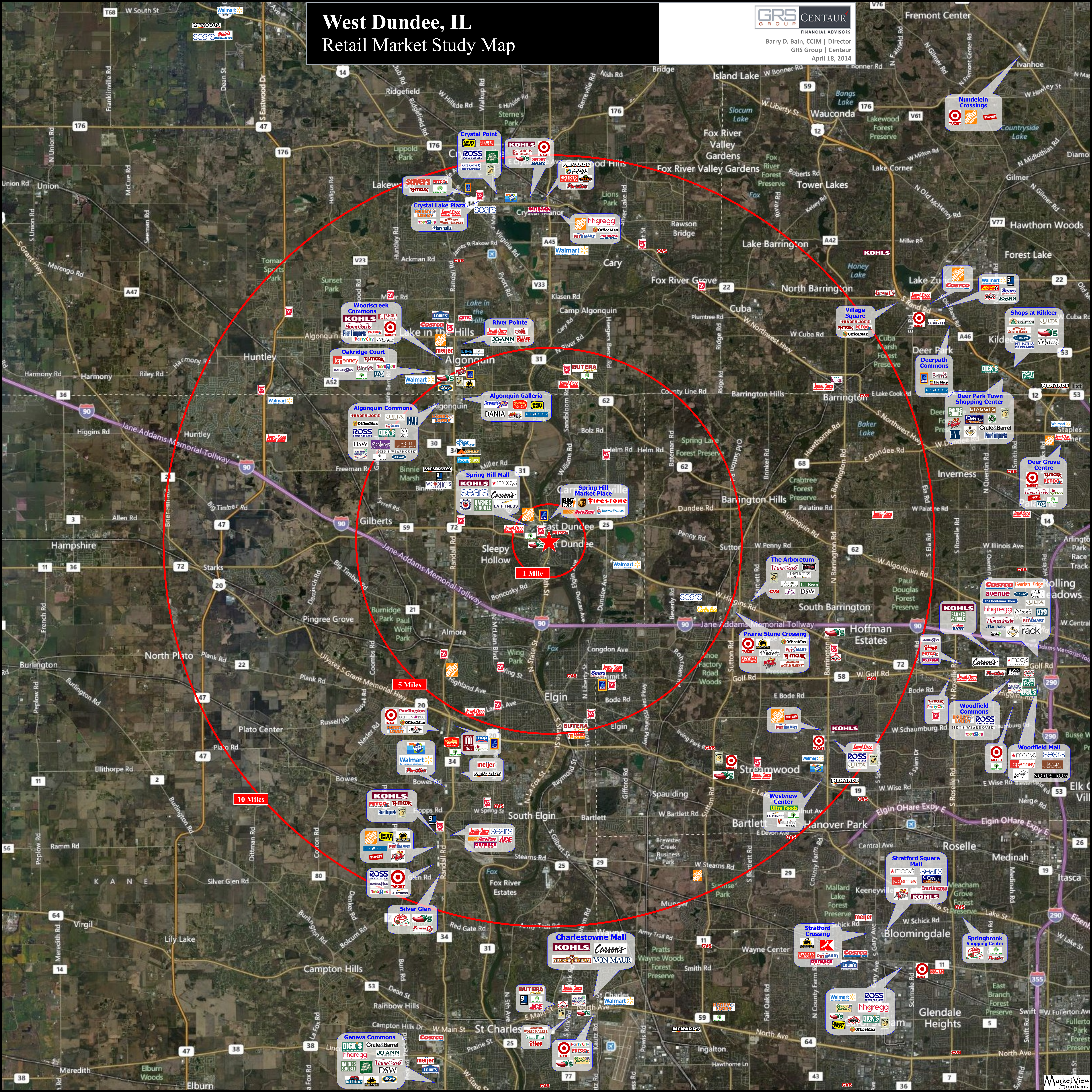
Phase 2 work is also underway. Direct contact with potential users has been initiated and continues. To enhance efforts, recruitment activity will continue at the national real estate convention known as ReCon hosted by the ICSC in Las Vegas on May 18-20th. Barry Bain will be in attendance at the convention and he will be working to generate interest in West Dundee existing retail spaces and developable areas.

We have been working closely with Barry to create a number of different tools for his use in Phase 2 efforts at ICSC and after as recruitment efforts continue. These marketing tools include a brochure highlighting the community demographics and available retail and development spaces and a few different potential site plans for the redevelopment of Gateway East as designed with staff and consultant input by Rick Gilmore, architect. These site designs include alternative renditions to allow for stand alone pad ready sites and reconfigured existing spaces. The site plans are attached; the marketing piece is being finalized and will be available for review Monday evening.

Also attached is the draft target list of retailers as refined. As earlier stated, this list has been developed systematically and with a great deal of analysis. Earlier drafts of this list did include more "wish list" users but some of these have been eliminated due to the application of criteria for location that cannot be met.

RECOMMENDATION

Consultant Barry Bain will be present at the meeting to provide a benchmark progress report and discuss Phase 1 findings and reports produced as well as Phase 2 efforts underway and continuing. Feedback on the materials presented and input and direction from the Village Board is requested and appreciated.


West Dundee, IL
Retail Market Study Map
GRS GROUP CENTAUR
FINANCIAL ADVISORS
Barry D. Bain, CCIM | Director
GRS Group | Centaur
April 18, 2014
1 Mile
5 Miles
10 Miles
Crystal Point
Crystal Lake Plaza
Woodscreek Commons
Oakridge Court
River Pointe
Algonquin Galleria
Algonquin Commons
Spring Hill Mall
Spring Hill Market Place
Nundelein Crossings
Village Square
Shops at Kildeer
Deerpath Commons
Deer Park Town Shopping Center
Deer Grove Centre
The Arboretum
Prairie Stone Crossing
Woodfield Commons
Woodfield Mall
Westview Center
Stratford Square Mall
Stratford Crossing
Springbrook Shopping Center
Silver Glen
Charlestowne Mall
Geneva Commons
Elgin
East Dundee
West Dundee
Sleepy Hollow
Gilberts
Algonquin
Lake in the Hills
Crystal Lake
Huntley
Hampshire
Pingree Grove
Carpentersville
Barrington
Hoffman Estates
Streamwood
Bartlett
South Elgin
St Charles
Schaumburg
Bloomingdale
Jane Addams Memorial Tollway
MarketView Solutions

Executive Summary

West Dundee Retail Study Area
1, 5 and 10 mile radius
Rings: 1, 5, 10 mile radii

Prepared by Barry Bain
Latitude: 42.098118
Longitude: -88.28705

	1 mile	5 miles	10 miles
Population			
2000 Population	6,905	140,828	435,744
2010 Population	6,693	162,705	519,803
2013 Population	6,715	166,010	529,479
2018 Population	6,821	171,244	542,868
2000-2010 Annual Rate	-0.31%	1.45%	1.78%
2010-2013 Annual Rate	0.10%	0.62%	0.57%
2013-2018 Annual Rate	0.31%	0.62%	0.50%
2013 Male Population	49.2%	49.9%	49.6%
2013 Female Population	50.9%	50.1%	50.4%
2013 Median Age	42.5	33.8	36.1

In the identified area, the current year population is 529,479. In 2010, the Census count in the area was 519,803. The rate of change since 2010 was 0.57% annually. The five-year projection for the population in the area is 542,868 representing a change of 0.50% annually from 2013 to 2018. Currently, the population is 49.6% male and 50.4% female.

Median Age

The median age in this area is 36.1, compared to U.S. median age of 37.3.

	1 mile	5 miles	10 miles
Race and Ethnicity			
2013 White Alone	88.9%	69.5%	75.5%
2013 Black Alone	2.1%	5.4%	3.9%
2013 American Indian/Alaska Native Alone	0.3%	0.9%	0.6%
2013 Asian Alone	2.7%	6.3%	8.6%
2013 Pacific Islander Alone	0.0%	0.0%	0.0%
2013 Other Race	3.6%	14.7%	8.7%
2013 Two or More Races	2.5%	3.2%	2.7%
2013 Hispanic Origin (Any Race)	13.3%	38.1%	23.8%

Persons of Hispanic origin represent 23.8% of the population in the identified area compared to 17.4% of the U.S. population. 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 63.2 in the identified area, compared to 62.1 for the U.S. as a whole.

	1 mile	5 miles	10 miles
Households			
2000 Households	2,772	46,248	145,848
2010 Households	2,772	52,934	175,350
2013 Total Households	2,788	53,948	178,568
2018 Total Households	2,835	55,621	183,435
2000-2010 Annual Rate	0.00%	1.36%	1.86%
2010-2013 Annual Rate	0.17%	0.59%	0.56%
2013-2018 Annual Rate	0.33%	0.61%	0.54%
2013 Average Household Size	2.41	3.05	2.95

The household count in this area has changed from 175,350 in 2010 to 178,568 in the current year, a change of 0.56% annually. The five-year projection of households is 183,435, a change of 0.54% annually from the current year total. Average household size is currently 2.95, compared to 2.95 in the year 2010. The number of families in the current year is 135,312 in the specified area.

Data Note: Income is expressed in current dollars
Source: U.S. Census Bureau, Census 2010 Summary File 1. Esri forecasts for 2013 and 2018. Esri converted Census 2000 data into 2010 geography.

March 17, 2014

Executive Summary

West Dundee Retail Study Area
1, 5 and 10 mile radius
Rings: 1, 5, 10 mile radii

Prepared by Barry Bain
Latitude: 42.098118
Longitude: -88.28705

	1 mile	5 miles	10 miles
Median Household Income			
2013 Median Household Income	$69,036	$63,328	$76,409
2018 Median Household Income	$81,686	$76,996	$86,254
2013-2018 Annual Rate	3.42%	3.99%	2.45%
Average Household Income			
2013 Average Household Income	$86,346	$82,740	$94,977
2018 Average Household Income	$99,647	$94,345	$107,807
2013-2018 Annual Rate	2.91%	2.66%	2.57%
Per Capita Income			
2013 Per Capita Income	$34,692	$27,107	$32,168
2018 Per Capita Income	$40,094	$30,860	$36,562
2013-2018 Annual Rate	2.94%	2.63%	2.59%

Households by Income

Current median household income is $76,409 in the area, compared to $51,314 for all U.S. households. Median household income is projected to be $86,254 in five years, compared to $59,580 for all U.S. households

Current average household income is $94,977 in this area, compared to $71,842 for all U.S households. Average household income is projected to be $107,807 in five years, compared to $83,667 for all U.S. households

Current per capita income is $32,168 in the area, compared to the U.S. per capita income of $27,567. The per capita income is projected to be $36,562 in five years, compared to $32,073 for all U.S. households

	1 mile	5 miles	10 miles
Housing			
2000 Total Housing Units	2,860	47,767	149,906
2000 Owner Occupied Housing Units	2,015	35,163	120,476
2000 Owner Occupied Housing Units	757	11,085	25,372
2000 Vacant Housing Units	88	1,519	4,058
2010 Total Housing Units	2,951	56,599	185,093
2010 Owner Occupied Housing Units	2,007	39,567	144,119
2010 Renter Occupied Housing Units	765	13,367	31,231
2010 Vacant Housing Units	179	3,665	9,743
2013 Total Housing Units	2,962	57,457	188,274
2013 Owner Occupied Housing Units	1,964	39,538	144,825
2013 Renter Occupied Housing Units	824	14,410	33,742
2013 Vacant Housing Units	174	3,509	9,706
2018 Total Housing Units	3,046	58,989	192,042
2018 Owner Occupied Housing Units	2,041	41,297	150,150
2018 Renter Occupied Housing Units	794	14,323	33,285
2018 Vacant Housing Units	211	3,368	8,607

Currently, 76.9% of the 188,274 housing units in the area are owner occupied; 17.9%, renter occupied; and 5.2% are vacant. Currently, in the U.S., 56.4% of the housing units in the area are owner occupied; 32.3% are renter occupied; and 11.3% are vacant. In 2010, there were 185,093 housing units in the area - 77.9% owner occupied, 16.9% renter occupied, and 5.3% vacant. The annual rate of change in housing units since 2010 is 0.76%. Median home value in the area is $219,926, compared to a median home value of $177,257 for the U.S. In five years, median value is projected to change by 2.70% annually to $251,254.

Data Note: Income is expressed in current dollars
Source: U.S. Census Bureau, Census 2010 Summary File 1. Esri forecasts for 2013 and 2018. Esri converted Census 2000 data into 2010 geography.

March 17, 2014

Business Summary

West Dundee Retail Study Area
1, 5 and 10 mile radius
Rings: 1, 5, 10 mile radii

Prepared by Barry Bain
Latitude: 42.098118
Longitude: -88.28705

Data for all businesses in area	1 mile	5 miles	10 miles
Total Businesses:	806	7,376	24,198
Total Employees:	6,321	58,498	171,657
Total Residential Population:	6,715	166,010	529,479
Employee/Residential Population Ratio:	0.94	0.35	0.32

	Businesses		Employees		Businesses		Employees		Businesses		Employees	
by SIC Codes	**Number**	**Percent**	**Number**	**Percent**	**Number**	**Percent**	**Number**	**Percent**	**Number**	**Percent**	**Number**	**Percent**
Agriculture & Mining	13	1.6%	74	1.2%	157	2.1%	848	1.4%	596	2.5%	2,708	1.6%
Construction	71	8.8%	239	3.8%	689	9.3%	4,072	7.0%	2,389	9.9%	11,627	6.8%
Manufacturing	39	4.8%	728	11.5%	420	5.7%	8,959	15.3%	1,205	5.0%	22,338	13.0%
Transportation	21	2.6%	144	2.3%	278	3.8%	1,751	3.0%	875	3.6%	4,947	2.9%
Communication	9	1.1%	56	0.9%	70	0.9%	385	0.7%	204	0.8%	3,606	2.1%
Utility	2	0.2%	10	0.2%	25	0.3%	156	0.3%	63	0.3%	404	0.2%
Wholesale Trade	42	5.2%	227	3.6%	429	5.8%	3,758	6.4%	1,292	5.3%	9,968	5.8%
Retail Trade Summary	163	20.2%	2,616	41.4%	1,086	14.7%	11,562	19.8%	3,343	13.8%	33,165	19.3%
Home Improvement	4	0.5%	133	2.1%	48	0.7%	663	1.1%	167	0.7%	2,637	1.5%
General Merchandise Stores	5	0.6%	785	12.4%	23	0.3%	1,871	3.2%	70	0.3%	5,153	3.0%
Food Stores	12	1.5%	158	2.5%	90	1.2%	1,640	2.8%	302	1.2%	4,775	2.8%
Auto Dealers, Gas Stations, Auto Aftermarket	6	0.7%	89	1.4%	83	1.1%	865	1.5%	263	1.1%	2,802	1.6%
Apparel & Accessory Stores	28	3.5%	238	3.8%	102	1.4%	970	1.7%	252	1.0%	1,859	1.1%
Furniture & Home Furnishings	17	2.1%	76	1.2%	110	1.5%	478	0.8%	329	1.4%	1,354	0.8%
Eating & Drinking Places	40	5.0%	671	10.6%	296	4.0%	3,049	5.2%	872	3.6%	8,301	4.8%
Miscellaneous Retail	50	6.2%	467	7.4%	333	4.5%	2,024	3.5%	1,088	4.5%	6,284	3.7%
Finance, Insurance, Real Estate Summary	58	7.2%	266	4.2%	510	6.9%	5,597	9.6%	1,802	7.4%	12,484	7.3%
Banks, Savings & Lending Institutions	13	1.6%	121	1.9%	97	1.3%	4,103	7.0%	303	1.3%	7,215	4.2%
Securities Brokers	4	0.5%	10	0.2%	30	0.4%	198	0.3%	143	0.6%	655	0.4%
Insurance Carriers & Agents	15	1.9%	48	0.8%	114	1.5%	421	0.7%	400	1.7%	1,420	0.8%
Real Estate, Holding, Other Investment Offices	26	3.2%	86	1.4%	269	3.6%	876	1.5%	956	4.0%	3,194	1.9%
Services Summary	379	47.0%	1,609	25.5%	3,663	49.7%	19,619	33.5%	12,287	50.8%	66,333	38.6%
Hotels & Lodging	6	0.7%	90	1.4%	18	0.2%	243	0.4%	52	0.2%	583	0.3%
Automotive Services	13	1.6%	66	1.0%	157	2.1%	620	1.1%	491	2.0%	1,969	1.1%
Motion Pictures & Amusements	17	2.1%	97	1.5%	153	2.1%	1,182	2.0%	542	2.2%	4,257	2.5%
Health Services	34	4.2%	146	2.3%	463	6.3%	3,933	6.7%	1,493	6.2%	12,614	7.3%
Legal Services	16	2.0%	46	0.7%	128	1.7%	386	0.7%	317	1.3%	899	0.5%
Education Institutions & Libraries	12	1.5%	196	3.1%	125	1.7%	3,649	6.2%	385	1.6%	14,210	8.3%
Other Services	281	34.9%	968	15.3%	2,618	35.5%	9,606	16.4%	9,007	37.2%	31,801	18.5%
Government	10	1.2%	352	5.6%	49	0.7%	1,792	3.1%	141	0.6%	4,077	2.4%
Totals	806	100%	6,321	100%	7,376	100%	58,498	100%	24,198	100%	171,657	100%

March 17, 2014

Business Summary

West Dundee Retail Study Area
1, 5 and 10 mile radius
Rings: 1, 5, 10 mile radii

Prepared by Barry Bain
Latitude: 42.098118
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	Businesses		Employees		Businesses		Employees		Businesses		Employees	
by NAICS Codes	Number	Percent	Number	Percent	Number	Percent	Number	Percent	Number	Percent	Number	Percent
Agriculture, Forestry, Fishing & Hunting	1	0.1%	9	0.1%	27	0.4%	113	0.2%	149	0.6%	473	0.3%
Mining	1	0.1%	5	0.1%	6	0.1%	61	0.1%	13	0.1%	137	0.1%
Utilities	1	0.1%	6	0.1%	8	0.1%	58	0.1%	21	0.1%	123	0.1%
Construction	72	8.9%	240	3.8%	705	9.6%	4,110	7.0%	2,440	10.1%	11,756	6.8%
Manufacturing	41	5.1%	735	11.6%	433	5.9%	8,943	15.3%	1,219	5.0%	22,266	13.0%
Wholesale Trade	42	5.2%	227	3.6%	425	5.8%	3,752	6.4%	1,277	5.3%	9,927	5.8%
Retail Trade	120	14.9%	1,916	30.3%	768	10.4%	8,361	14.3%	2,423	10.0%	24,558	14.3%
Motor Vehicle & Parts Dealers	4	0.5%	72	1.1%	53	0.7%	705	1.2%	181	0.7%	2,380	1.4%
Furniture & Home Furnishings Stores	10	1.2%	42	0.7%	57	0.8%	186	0.3%	168	0.7%	627	0.4%
Electronics & Appliance Stores	8	1.0%	44	0.7%	46	0.6%	279	0.5%	155	0.6%	723	0.4%
Bldg Material & Garden Equipment & Supplies Dealers	4	0.5%	133	2.1%	48	0.7%	663	1.1%	165	0.7%	2,633	1.5%
Food & Beverage Stores	9	1.1%	134	2.1%	84	1.1%	1,617	2.8%	281	1.2%	4,652	2.7%
Health & Personal Care Stores	11	1.4%	243	3.8%	64	0.9%	955	1.6%	201	0.8%	2,737	1.6%
Gasoline Stations	3	0.4%	17	0.3%	30	0.4%	160	0.3%	82	0.3%	422	0.2%
Clothing & Clothing Accessories Stores	33	4.1%	262	4.1%	129	1.7%	1,041	1.8%	316	1.3%	2,034	1.2%
Sport Goods, Hobby, Book, & Music Stores	10	1.2%	101	1.6%	55	0.7%	282	0.5%	175	0.7%	929	0.5%
General Merchandise Stores	5	0.6%	785	12.4%	23	0.3%	1,871	3.2%	70	0.3%	5,153	3.0%
Miscellaneous Store Retailers	19	2.4%	77	1.2%	144	2.0%	522	0.9%	489	2.0%	1,980	1.2%
Nonstore Retailers	4	0.5%	5	0.1%	34	0.5%	80	0.1%	141	0.6%	288	0.2%
Transportation & Warehousing	17	2.1%	129	2.0%	259	3.5%	1,644	2.8%	789	3.3%	4,651	2.7%
Information	20	2.5%	151	2.4%	165	2.2%	949	1.6%	520	2.1%	5,631	3.3%
Finance & Insurance	36	4.5%	193	3.1%	273	3.7%	4,803	8.2%	1,004	4.1%	9,626	5.6%
Central Bank/Credit Intermediation & Related Activities	13	1.6%	121	1.9%	96	1.3%	4,094	7.0%	300	1.2%	7,194	4.2%
Securities, Commodity Contracts & Other Financial	7	0.9%	24	0.4%	60	0.8%	281	0.5%	294	1.2%	992	0.6%
Insurance Carriers & Related Activities; Funds, Trusts &	15	1.9%	48	0.8%	118	1.6%	428	0.7%	409	1.7%	1,439	0.8%
Real Estate, Rental & Leasing	26	3.2%	89	1.4%	263	3.6%	975	1.7%	863	3.6%	3,310	1.9%
Professional, Scientific & Tech Services	127	15.8%	427	6.8%	1,044	14.2%	3,700	6.3%	3,662	15.1%	11,372	6.6%
Legal Services	16	2.0%	47	0.7%	132	1.8%	391	0.7%	332	1.4%	971	0.6%
Management of Companies & Enterprises	3	0.4%	8	0.1%	15	0.2%	65	0.1%	45	0.2%	165	0.1%
Administrative & Support & Waste Management & Remediation	95	11.8%	293	4.6%	1,086	14.7%	3,216	5.5%	3,765	15.6%	12,670	7.4%
Educational Services	12	1.5%	181	2.9%	134	1.8%	3,477	5.9%	458	1.9%	13,983	8.1%
Health Care & Social Assistance	44	5.5%	196	3.1%	571	7.7%	5,000	8.5%	1,871	7.7%	15,257	8.9%
Arts, Entertainment & Recreation	14	1.7%	70	1.1%	118	1.6%	1,079	1.8%	391	1.6%	3,645	2.1%
Accommodation & Food Services	46	5.7%	763	12.1%	319	4.3%	3,351	5.7%	936	3.9%	8,990	5.2%
Accommodation	6	0.7%	90	1.4%	17	0.2%	242	0.4%	50	0.2%	575	0.3%
Food Services & Drinking Places	40	5.0%	673	10.6%	302	4.1%	3,109	5.3%	886	3.7%	8,415	4.9%
Other Services (except Public Administration)	79	9.8%	334	5.3%	708	9.6%	3,050	5.2%	2,213	9.1%	9,117	5.3%
Automotive Repair & Maintenance	11	1.4%	62	1.0%	137	1.9%	513	0.9%	421	1.7%	1,658	1.0%
Public Administration	10	1.2%	352	5.6%	49	0.7%	1,792	3.1%	140	0.6%	4,000	2.3%
Total	806	100%	6,321	100%	7,376	100%	58,498	100%	24,198	100%	171,657	100%

March 17, 2014

Retail MarketPlace Profile

West Dundee Retail Study Area
1, 5 and 10 mile radius
Ring: 1 mile radius

Prepared by Barry Bain
Latitude: 42.098118
Longitude: -88.28705

Summary Demographics	
2013 Population	6,715
2013 Households	2,788
2013 Median Disposable Income	$53,107
2013 Per Capita Income	$34,692

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	$100,429,791	$238,438,946	-$138,009,155	-40.7	152
Total Retail Trade	44-45	$90,354,777	$197,255,876	-$106,901,099	-37.2	122
Total Food & Drink	722	$10,075,014	$41,183,070	-$31,108,056	-60.7	30

Industry Group	NAICS	Demand (Retail Potential)	Supply (Retail Sales)	Retail Gap	Leakage/Surplus Factor	Number of Businesses
Motor Vehicle & Parts Dealers	441	$16,988,068	$18,140,696	-$1,152,628	-3.3	2
Automobile Dealers	4411	$14,580,089	$17,990,357	-$3,410,268	-10.5	2
Other Motor Vehicle Dealers	4412	$1,053,683	$49,173	$1,004,511	91.1	0
Auto Parts, Accessories & Tire Stores	4413	$1,354,295	$101,166	$1,253,129	86.1	0
Furniture & Home Furnishings Stores	442	$1,977,430	$4,868,110	-$2,890,681	-42.2	10
Furniture Stores	4421	$1,159,454	$4,121,058	-$2,961,605	-56.1	5
Home Furnishings Stores	4422	$817,976	$747,052	$70,924	4.5	5
Electronics & Appliance Stores	4431	$2,457,372	$20,963,446	-$18,506,074	-79.0	6
Bldg Materials, Garden Equip. & Supply Stores	444	$3,250,061	$10,799,218	-$7,549,157	-53.7	4
Bldg Material & Supplies Dealers	4441	$2,736,182	$10,799,218	-$8,063,036	-59.6	4
Lawn & Garden Equip & Supply Stores	4442	$513,879	$0	$513,879	100.0	0
Food & Beverage Stores	445	$14,521,273	$10,513,141	$4,008,132	16.0	9
Grocery Stores	4451	$12,910,739	$9,382,565	$3,528,174	15.8	4
Specialty Food Stores	4452	$432,954	$366,919	$66,035	8.3	4
Beer, Wine & Liquor Stores	4453	$1,177,581	$763,657	$413,924	21.3	2
Health & Personal Care Stores	446,4461	$7,699,499	$18,200,803	-$10,501,303	-40.5	10
Gasoline Stations	447,4471	$9,137,522	$2,837,080	$6,300,442	52.6	3
Clothing & Clothing Accessories Stores	448	$5,736,692	$30,768,872	-$25,032,179	-68.6	35
Clothing Stores	4481	$4,124,289	$24,107,110	-$19,982,821	-70.8	21
Shoe Stores	4482	$847,985	$5,159,704	-$4,311,718	-71.8	8
Jewelry, Luggage & Leather Goods Stores	4483	$764,418	$1,502,058	-$737,639	-32.5	6
Sporting Goods, Hobby, Book & Music Stores	451	$2,345,469	$12,117,491	-$9,772,023	-67.6	13
Sporting Goods/Hobby/Musical Instr Stores	4511	$1,816,606	$9,655,557	-$7,838,951	-68.3	12
Book, Periodical & Music Stores	4512	$528,863	$2,461,934	-$1,933,071	-64.6	1
General Merchandise Stores	452	$16,055,567	$64,578,408	-$48,522,841	-60.2	6
Department Stores Excluding Leased Depts.	4521	$6,165,979	$64,501,515	-$58,335,536	-82.5	5
Other General Merchandise Stores	4529	$9,889,589	$76,893	$9,812,696	98.5	1
Miscellaneous Store Retailers	453	$1,938,237	$2,039,848	-$101,612	-2.6	22
Florists	4531	$115,471	$87,051	$28,420	14.0	1
Office Supplies, Stationery & Gift Stores	4532	$327,225	$497,970	-$170,745	-20.7	6
Used Merchandise Stores	4533	$186,692	$424,512	-$237,820	-38.9	2
Other Miscellaneous Store Retailers	4539	$1,308,849	$1,030,315	$278,533	11.9	12
Nonstore Retailers	454	$8,247,587	$1,428,763	$6,818,824	70.5	4
Electronic Shopping & Mail-Order Houses	4541	$7,175,072	$1,255,799	$5,919,273	70.2	1
Vending Machine Operators	4542	$249,933	$12,324	$237,608	90.6	0
Direct Selling Establishments	4543	$822,582	$160,640	$661,942	67.3	2
Food Services & Drinking Places	722	$10,075,014	$41,183,070	-$31,108,056	-60.7	30
Full-Service Restaurants	7221	$4,470,703	$19,080,161	-$14,609,458	-62.0	12
Limited-Service Eating Places	7222	$4,607,890	$19,452,938	-$14,845,048	-61.7	13
Special Food Services	7223	$463,719	$1,851,354	-$1,387,635	-59.9	0
Drinking Places - Alcoholic Beverages	7224	$532,702	$798,617	-$265,915	-20.0	4

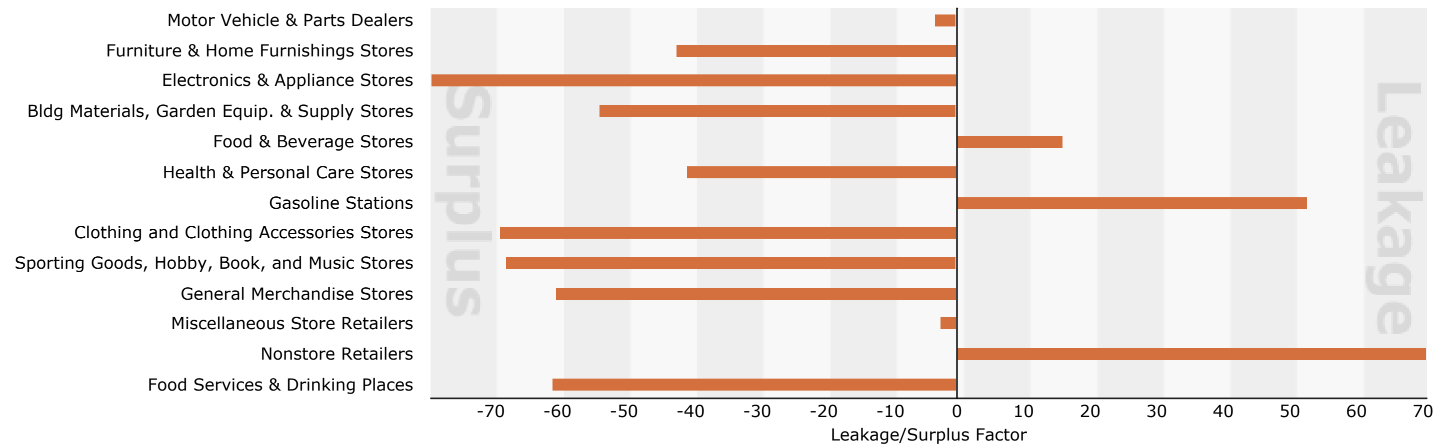
Data Note: Supply (retail sales) estimates sales to consumers by establishments. Sales to businesses are excluded. Demand (retail potential) estimates the expected amount spent by consumers at retail establishments. Supply and demand estimates are in current dollars. The Leakage/Surplus Factor presents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

March 17, 2014

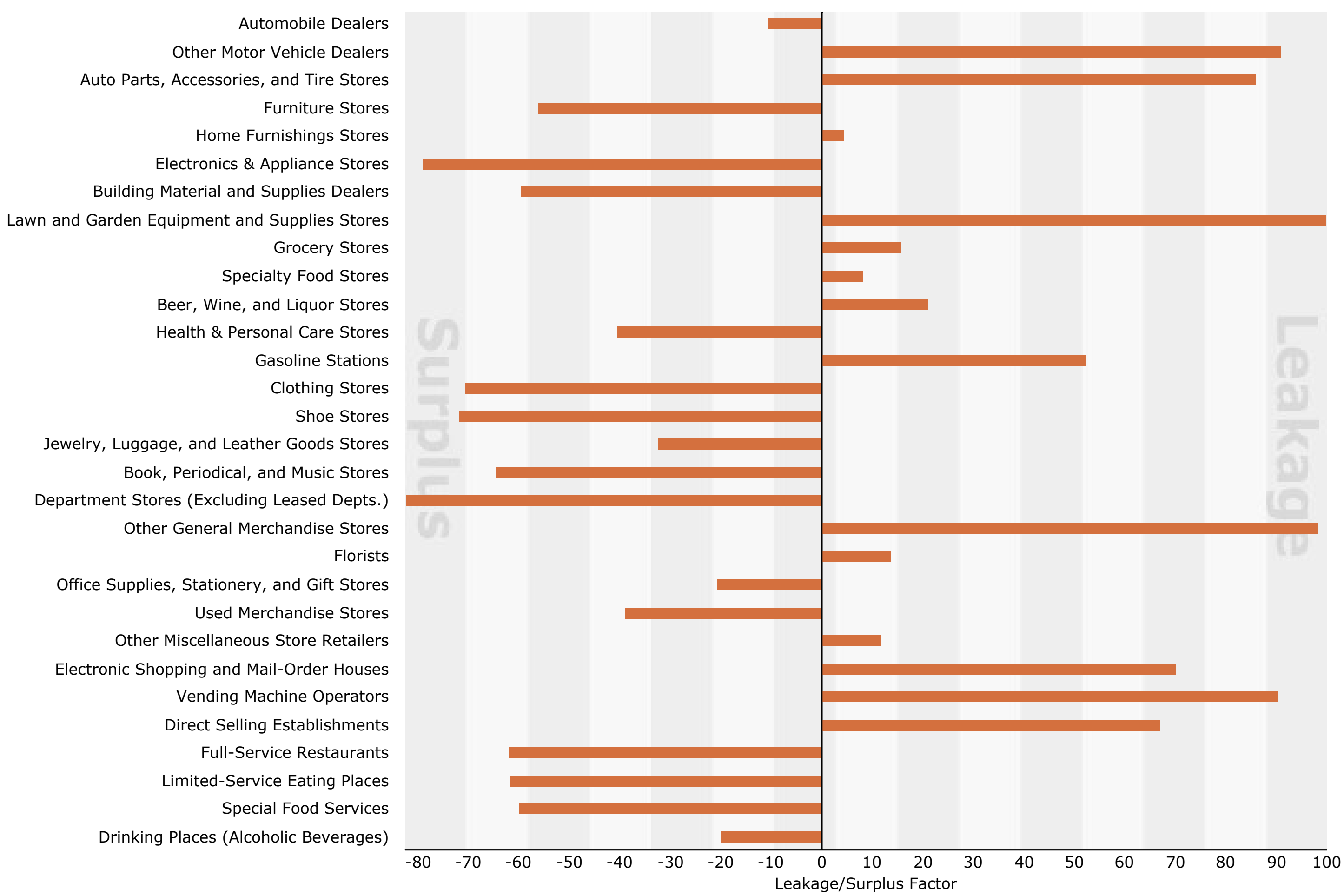
West Dundee Retail Study Area
1, 5 and 10 mile radius
Ring: 1 mile radius

Prepared by Barry Bain
Latitude: 42.098118
Longitude: -88.28705

Leakage/Surplus Factor by Industry Subsector



Leakage/Surplus Factor by Industry Group



Source: Esri and Dun & Bradstreet.

March 17, 2014

Retail MarketPlace Profile

West Dundee Retail Study Area
1, 5 and 10 mile radius
Ring: 5 mile radius

Prepared by Barry Bain
Latitude: 42.098118
Longitude: -88.28705

Summary Demographics	
2013 Population	166,010
2013 Households	53,948
2013 Median Disposable Income	$50,616
2013 Per Capita Income	$27,107

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	$1,843,784,919	$1,322,139,099	$521,645,820	16.5	932
Total Retail Trade	44-45	$1,656,861,891	$1,168,378,144	$488,483,747	17.3	761
Total Food & Drink	722	$186,923,028	$153,760,955	$33,162,073	9.7	171

Industry Group	NAICS	Demand (Retail Potential)	Supply (Retail Sales)	Retail Gap	Leakage/Surplus Factor	Number of Businesses
Motor Vehicle & Parts Dealers	441	$314,224,389	$232,542,236	$81,682,153	14.9	51
Automobile Dealers	4411	$270,934,452	$223,305,302	$47,629,150	9.6	26
Other Motor Vehicle Dealers	4412	$18,735,791	$2,418,703	$16,317,088	77.1	6
Auto Parts, Accessories & Tire Stores	4413	$24,554,146	$6,818,232	$17,735,915	56.5	18
Furniture & Home Furnishings Stores	442	$36,077,353	$18,394,517	$17,682,836	32.5	59
Furniture Stores	4421	$21,463,798	$10,930,138	$10,533,660	32.5	25
Home Furnishings Stores	4422	$14,613,555	$7,464,379	$7,149,177	32.4	34
Electronics & Appliance Stores	4431	$45,481,818	$70,574,137	-$25,092,319	-21.6	39
Bldg Materials, Garden Equip. & Supply Stores	444	$57,922,282	$43,224,237	$14,698,045	14.5	53
Bldg Material & Supplies Dealers	4441	$49,277,470	$38,868,404	$10,409,066	11.8	49
Lawn & Garden Equip & Supply Stores	4442	$8,644,812	$4,355,834	$4,288,978	33.0	4
Food & Beverage Stores	445	$267,408,956	$201,439,008	$65,969,948	14.1	81
Grocery Stores	4451	$237,938,628	$183,484,449	$54,454,179	12.9	47
Specialty Food Stores	4452	$7,979,210	$4,887,393	$3,091,818	24.0	18
Beer, Wine & Liquor Stores	4453	$21,491,117	$13,067,166	$8,423,951	24.4	16
Health & Personal Care Stores	446,4461	$138,448,458	$114,764,259	$23,684,199	9.4	57
Gasoline Stations	447,4471	$170,407,347	$36,471,841	$133,935,506	64.7	29
Clothing & Clothing Accessories Stores	448	$105,215,801	$150,927,979	-$45,712,178	-17.8	130
Clothing Stores	4481	$75,412,410	$127,697,102	-$52,284,692	-25.7	84
Shoe Stores	4482	$15,698,694	$15,836,270	-$137,577	-0.4	18
Jewelry, Luggage & Leather Goods Stores	4483	$14,104,696	$7,394,606	$6,710,090	31.2	27
Sporting Goods, Hobby, Book & Music Stores	451	$43,654,737	$27,140,191	$16,514,546	23.3	66
Sporting Goods/Hobby/Musical Instr Stores	4511	$33,851,681	$21,486,557	$12,365,123	22.3	55
Book, Periodical & Music Stores	4512	$9,803,057	$5,653,634	$4,149,423	26.8	11
General Merchandise Stores	452	$296,166,160	$220,233,445	$75,932,715	14.7	19
Department Stores Excluding Leased Depts.	4521	$114,232,784	$193,142,744	-$78,909,960	-25.7	16
Other General Merchandise Stores	4529	$181,933,376	$27,090,700	$154,842,675	74.1	4
Miscellaneous Store Retailers	453	$35,243,823	$19,781,093	$15,462,730	28.1	147
Florists	4531	$1,945,953	$568,973	$1,376,980	54.8	9
Office Supplies, Stationery & Gift Stores	4532	$5,991,533	$5,680,163	$311,370	2.7	40
Used Merchandise Stores	4533	$3,431,377	$2,357,495	$1,073,882	18.6	19
Other Miscellaneous Store Retailers	4539	$23,874,959	$11,174,462	$12,700,497	36.2	79
Nonstore Retailers	454	$146,610,767	$32,885,202	$113,725,565	63.4	31
Electronic Shopping & Mail-Order Houses	4541	$129,577,754	$17,498,260	$112,079,494	76.2	8
Vending Machine Operators	4542	$4,617,994	$569,702	$4,048,292	78.0	4
Direct Selling Establishments	4543	$12,415,020	$14,817,240	-$2,402,220	-8.8	18
Food Services & Drinking Places	722	$186,923,028	$153,760,955	$33,162,073	9.7	171
Full-Service Restaurants	7221	$82,866,344	$53,250,392	$29,615,952	21.8	56
Limited-Service Eating Places	7222	$85,887,205	$74,853,462	$11,033,743	6.9	77
Special Food Services	7223	$8,541,560	$18,867,260	-$10,325,700	-37.7	13
Drinking Places - Alcoholic Beverages	7224	$9,627,919	$6,789,841	$2,838,078	17.3	26

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.

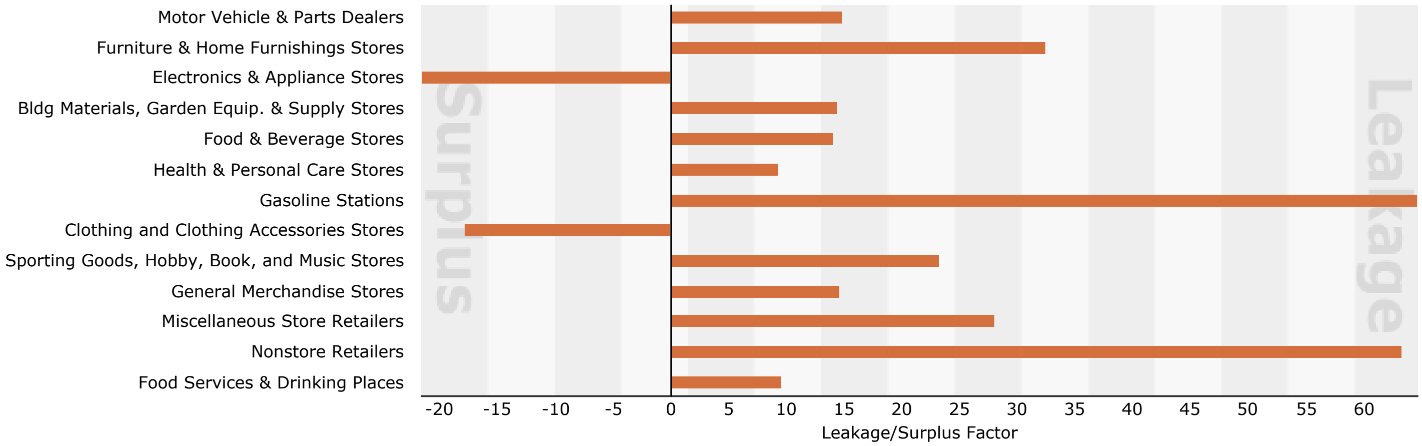
March 17, 2014

Retail MarketPlace Profile

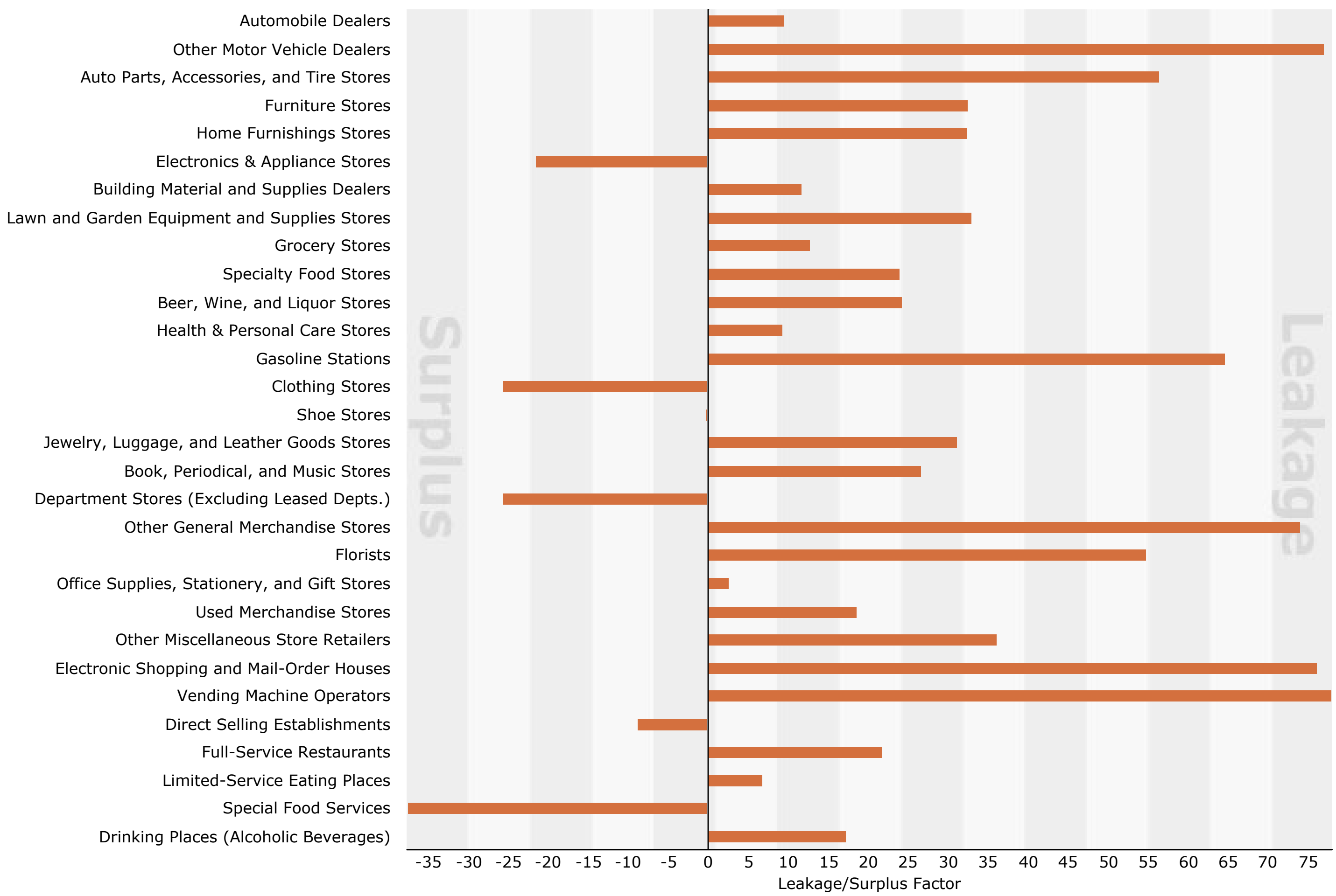
West Dundee Retail Study Area
1, 5 and 10 mile radius
Ring: 5 mile radius

Prepared by Barry Bain
Latitude: 42.098118
Longitude: -88.28705

Leakage/Surplus Factor by Industry Subsector



Leakage/Surplus Factor by Industry Group



March 17, 2014

Retail MarketPlace Profile

West Dundee Retail Study Area
1, 5 and 10 mile radius
Ring: 10 mile radius

Prepared by Barry Bain
Latitude: 42.098118
Longitude: -88.28705

Summary Demographics						
2013 Population						529,479
2013 Households						178,568
2013 Median Disposable Income						$56,706
2013 Per Capita Income						$32,168

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	$6,762,138,272	$4,942,241,501	$1,819,896,771	15.5	2,907
Total Retail Trade	44-45	$6,079,462,718	$4,501,406,425	$1,578,056,293	14.9	2,410
Total Food & Drink	722	$682,675,554	$440,835,076	$241,840,478	21.5	497

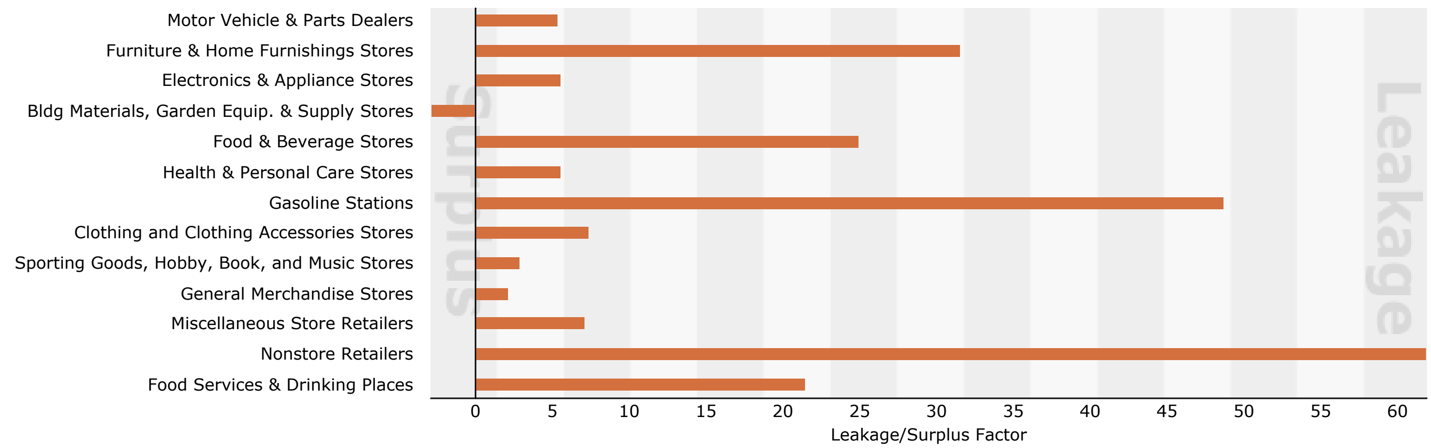
Industry Group	NAICS	Demand (Retail Potential)	Supply (Retail Sales)	Retail Gap	Leakage/Surplus Factor	Number of Businesses
Motor Vehicle & Parts Dealers	441	$1,158,554,229	$1,039,707,828	$118,846,401	5.4	160
Automobile Dealers	4411	$997,084,095	$975,410,426	$21,673,669	1.1	71
Other Motor Vehicle Dealers	4412	$71,010,128	$25,363,870	$45,646,258	47.4	31
Auto Parts, Accessories & Tire Stores	4413	$90,460,006	$38,933,532	$51,526,474	39.8	58
Furniture & Home Furnishings Stores	442	$133,875,995	$69,594,115	$64,281,879	31.6	159
Furniture Stores	4421	$79,194,304	$37,772,655	$41,421,649	35.4	57
Home Furnishings Stores	4422	$54,681,691	$31,821,461	$22,860,230	26.4	102
Electronics & Appliance Stores	4431	$167,181,505	$149,502,090	$17,679,415	5.6	145
Bldg Materials, Garden Equip. & Supply Stores	444	$219,671,858	$232,787,810	-$13,115,953	-2.9	178
Bldg Material & Supplies Dealers	4441	$186,982,166	$212,862,044	-$25,879,878	-6.5	160
Lawn & Garden Equip & Supply Stores	4442	$32,689,692	$19,925,767	$12,763,925	24.3	18
Food & Beverage Stores	445	$970,132,493	$581,563,116	$388,569,378	25.0	265
Grocery Stores	4451	$862,183,713	$519,390,584	$342,793,129	24.8	149
Specialty Food Stores	4452	$28,887,039	$20,701,375	$8,185,664	16.5	71
Beer, Wine & Liquor Stores	4453	$79,061,741	$41,471,156	$37,590,585	31.2	45
Health & Personal Care Stores	446,4461	$509,685,591	$455,480,018	$54,205,573	5.6	190
Gasoline Stations	447,4471	$619,859,481	$214,066,181	$405,793,300	48.7	78
Clothing & Clothing Accessories Stores	448	$386,792,541	$333,345,553	$53,446,988	7.4	312
Clothing Stores	4481	$276,980,500	$270,648,845	$6,331,655	1.2	212
Shoe Stores	4482	$57,039,813	$44,894,238	$12,145,575	11.9	35
Jewelry, Luggage & Leather Goods Stores	4483	$52,772,228	$17,802,470	$34,969,758	49.5	64
Sporting Goods, Hobby, Book & Music Stores	451	$160,111,239	$150,974,515	$9,136,724	2.9	190
Sporting Goods/Hobby/Musical Instr Stores	4511	$124,271,852	$135,791,328	-$11,519,475	-4.4	157
Book, Periodical & Music Stores	4512	$35,839,387	$15,183,188	$20,656,199	40.5	33
General Merchandise Stores	452	$1,080,243,465	$1,033,793,556	$46,449,909	2.2	68
Department Stores Excluding Leased Depts.	4521	$418,634,951	$391,911,365	$26,723,586	3.3	40
Other General Merchandise Stores	4529	$661,608,514	$641,882,191	$19,726,322	1.5	27
Miscellaneous Store Retailers	453	$130,039,259	$112,536,255	$17,503,004	7.2	526
Florists	4531	$7,430,989	$4,234,754	$3,196,235	27.4	39
Office Supplies, Stationery & Gift Stores	4532	$22,052,336	$31,575,903	-$9,523,567	-17.8	140
Used Merchandise Stores	4533	$12,594,026	$8,164,327	$4,429,699	21.3	48
Other Miscellaneous Store Retailers	4539	$87,961,907	$68,561,270	$19,400,637	12.4	298
Nonstore Retailers	454	$543,315,063	$128,055,387	$415,259,676	61.9	138
Electronic Shopping & Mail-Order Houses	4541	$478,962,044	$95,390,581	$383,571,463	66.8	24
Vending Machine Operators	4542	$16,727,665	$4,709,102	$12,018,563	56.1	29
Direct Selling Establishments	4543	$47,625,354	$27,955,704	$19,669,649	26.0	85
Food Services & Drinking Places	722	$682,675,554	$440,835,076	$241,840,478	21.5	497
Full-Service Restaurants	7221	$302,873,638	$179,427,399	$123,446,239	25.6	178
Limited-Service Eating Places	7222	$312,727,913	$212,283,490	$100,444,423	19.1	222
Special Food Services	7223	$31,474,348	$30,115,800	$1,358,548	2.2	30
Drinking Places - Alcoholic Beverages	7224	$35,599,655	$19,008,387	$16,591,268	30.4	66

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.

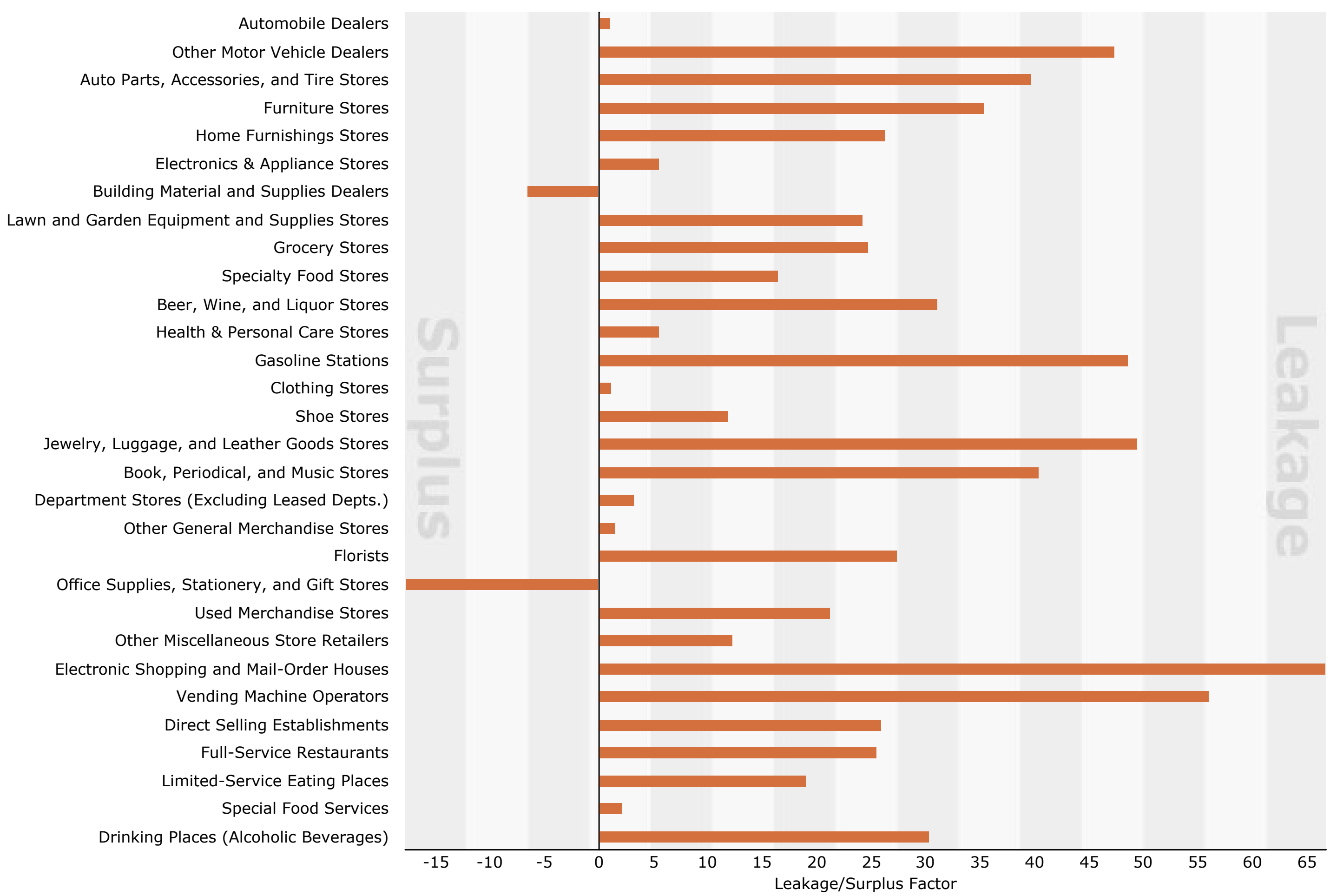
Source: Esri and Dun & Bradstreet.

March 17, 2014

Leakage/Surplus Factor by Industry Subsector



Leakage/Surplus Factor by Industry Group



Source: Esri and Dun & Bradstreet.

March 17, 2014

Demographic and Income Profile

West Dundee Retail Study Area
1, 5 and 10 mile radius
Ring: 1 mile radius

Prepared by Barry Bain
Latitude: 42.098118
Longitude: -88.28705

Summary	Census 2010	2013	2018
Population	6,693	6,715	6,821
Households	2,772	2,788	2,835
Families	1,876	1,870	1,883
Average Household Size	2.41	2.41	2.41
Owner Occupied Housing Units	2,007	1,964	2,041
Renter Occupied Housing Units	765	824	794
Median Age	41.7	42.5	43.5
Trends: 2013 - 2018 Annual Rate	**Area**	**State**	**National**
Population	0.31%	0.26%	0.71%
Households	0.33%	0.32%	0.74%
Families	0.14%	0.15%	0.63%
Owner HHs	0.77%	0.54%	0.94%
Median Household Income	3.42%	3.14%	3.03%

	2013		2018	
Households by Income	Number	Percent	Number	Percent
<$15,000	207	7.4%	183	6.5%
$15,000 - $24,999	233	8.4%	168	5.9%
$25,000 - $34,999	245	8.8%	209	7.4%
$35,000 - $49,999	291	10.4%	246	8.7%
$50,000 - $74,999	510	18.3%	425	15.0%
$75,000 - $99,999	433	15.5%	545	19.2%
$100,000 - $149,999	569	20.4%	685	24.2%
$150,000 - $199,999	163	5.8%	210	7.4%
$200,000+	139	5.0%	163	5.7%
Median Household Income	$69,036		$81,686	
Average Household Income	$86,346		$99,647	
Per Capita Income	$34,692		$40,094	

	Census 2010		2013		2018	
Population by Age	Number	Percent	Number	Percent	Number	Percent
0 - 4	374	5.6%	352	5.2%	351	5.1%
5 - 9	407	6.1%	389	5.8%	375	5.5%
10 - 14	444	6.6%	432	6.4%	419	6.1%
15 - 19	399	6.0%	397	5.9%	393	5.8%
20 - 24	360	5.4%	360	5.4%	324	4.8%
25 - 34	763	11.4%	798	11.9%	829	12.2%
35 - 44	929	13.9%	861	12.8%	840	12.3%
45 - 54	1,220	18.2%	1,130	16.8%	1,003	14.7%
55 - 64	911	13.6%	1,001	14.9%	1,122	16.4%
65 - 74	491	7.3%	574	8.5%	705	10.3%
75 - 84	272	4.1%	287	4.3%	326	4.8%
85+	123	1.8%	133	2.0%	134	2.0%
	Census 2010		**2013**		**2018**	
Race and Ethnicity	Number	Percent	Number	Percent	Number	Percent
White Alone	6,003	89.7%	5,969	88.9%	5,958	87.3%
Black Alone	130	1.9%	140	2.1%	157	2.3%
American Indian Alone	16	0.2%	19	0.3%	21	0.3%
Asian Alone	180	2.7%	181	2.7%	199	2.9%
Pacific Islander Alone	1	0.0%	1	0.0%	1	0.0%
Some Other Race Alone	210	3.1%	239	3.6%	292	4.3%
Two or More Races	152	2.3%	166	2.5%	194	2.8%
Hispanic Origin (Any Race)	782	11.7%	892	13.3%	1,104	16.2%

Data Note: Income is expressed in current dollars.
Source: U.S. Census Bureau, Census 2010 Summary File 1. Esri forecasts for 2013 and 2018.

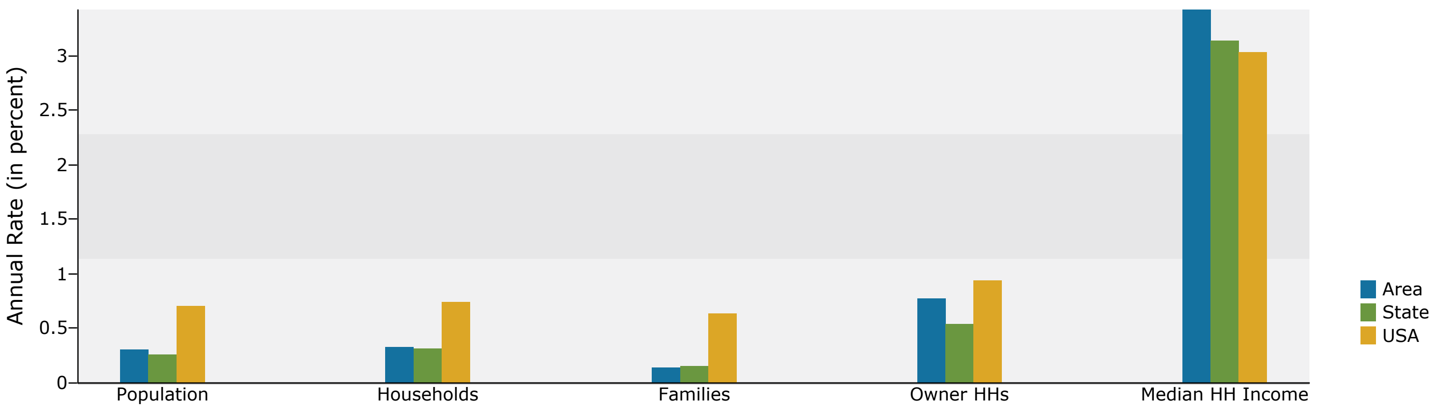
March 17, 2014

Demographic and Income Profile

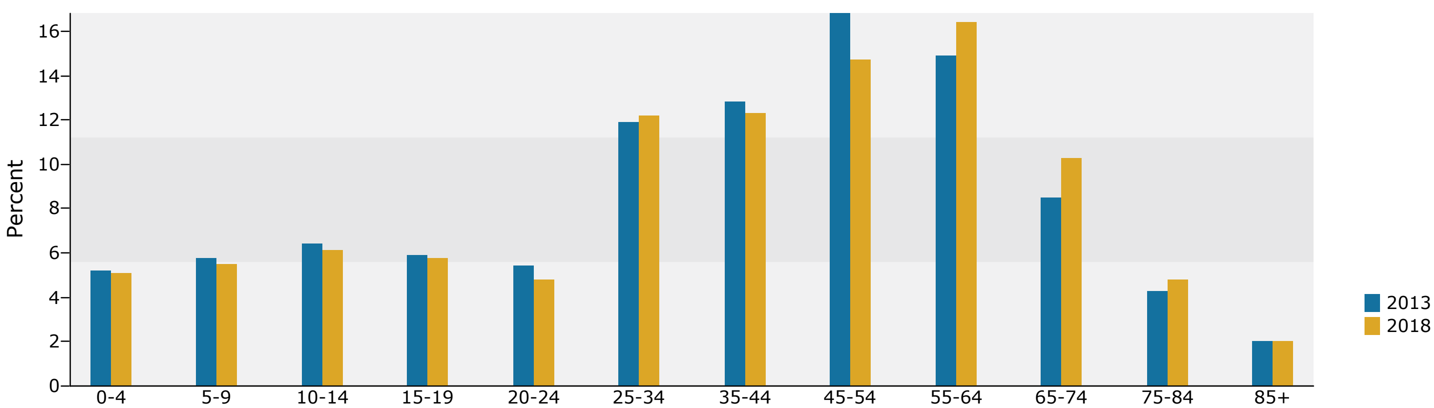
West Dundee Retail Study Area
1, 5 and 10 mile radius
Ring: 1 mile radius

Prepared by Barry Bain
Latitude: 42.098118
Longitude: -88.28705

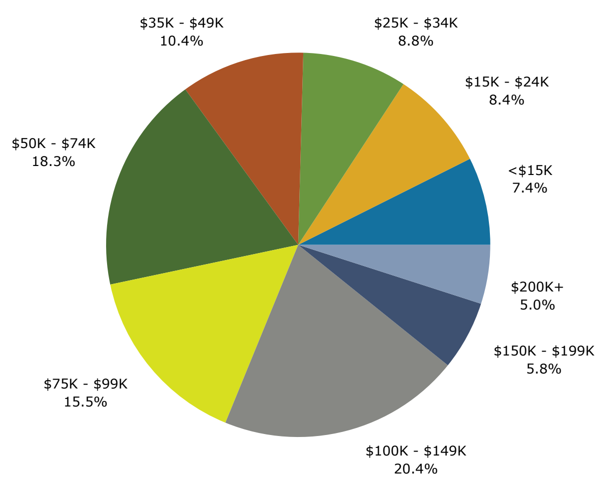
Trends 2013-2018



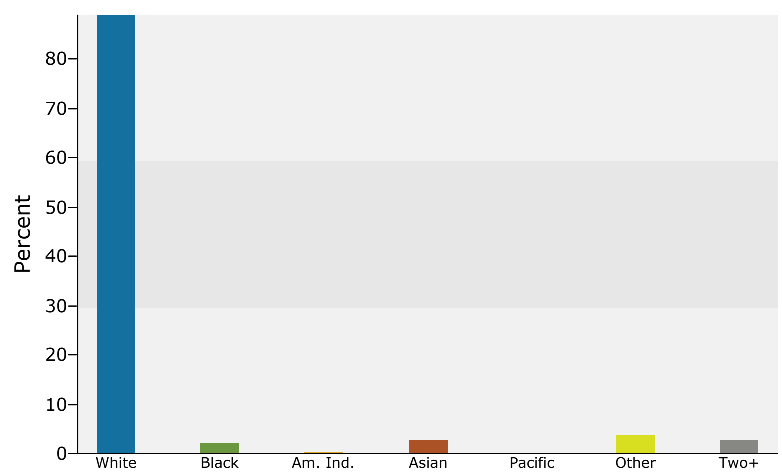
Population by Age



2013 Household Income



2013 Population by Race



2013 Percent Hispanic Origin: 13.3%

Source: U.S. Census Bureau, Census 2010 Summary File 1. Esri forecasts for 2013 and 2018.

March 17, 2014

Demographic and Income Profile

West Dundee Retail Study Area
1, 5 and 10 mile radius
Ring: 5 mile radius

Prepared by Barry Bain
Latitude: 42.098118
Longitude: -88.28705

Summary	Census 2010	2013	2018
Population	162,705	166,010	171,244
Households	52,934	53,948	55,621
Families	39,574	40,072	41,037
Average Household Size	3.04	3.05	3.05
Owner Occupied Housing Units	39,567	39,538	41,297
Renter Occupied Housing Units	13,367	14,410	14,323
Median Age	33.4	33.8	34.4
Trends: 2013 - 2018 Annual Rate	**Area**	**State**	**National**
Population	0.62%	0.26%	0.71%
Households	0.61%	0.32%	0.74%
Families	0.48%	0.15%	0.63%
Owner HHs	0.87%	0.54%	0.94%
Median Household Income	3.99%	3.14%	3.03%

	2013		2018	
Households by Income	Number	Percent	Number	Percent
<$15,000	3,569	6.6%	3,384	6.1%
$15,000 - $24,999	4,589	8.5%	3,530	6.3%
$25,000 - $34,999	4,854	9.0%	4,485	8.1%
$35,000 - $49,999	7,412	13.7%	6,462	11.6%
$50,000 - $74,999	10,439	19.4%	8,810	15.8%
$75,000 - $99,999	8,000	14.8%	10,300	18.5%
$100,000 - $149,999	9,667	17.9%	11,875	21.3%
$150,000 - $199,999	2,978	5.5%	3,941	7.1%
$200,000+	2,442	4.5%	2,834	5.1%
Median Household Income	$63,328		$76,996	
Average Household Income	$82,740		$94,345	
Per Capita Income	$27,107		$30,860	

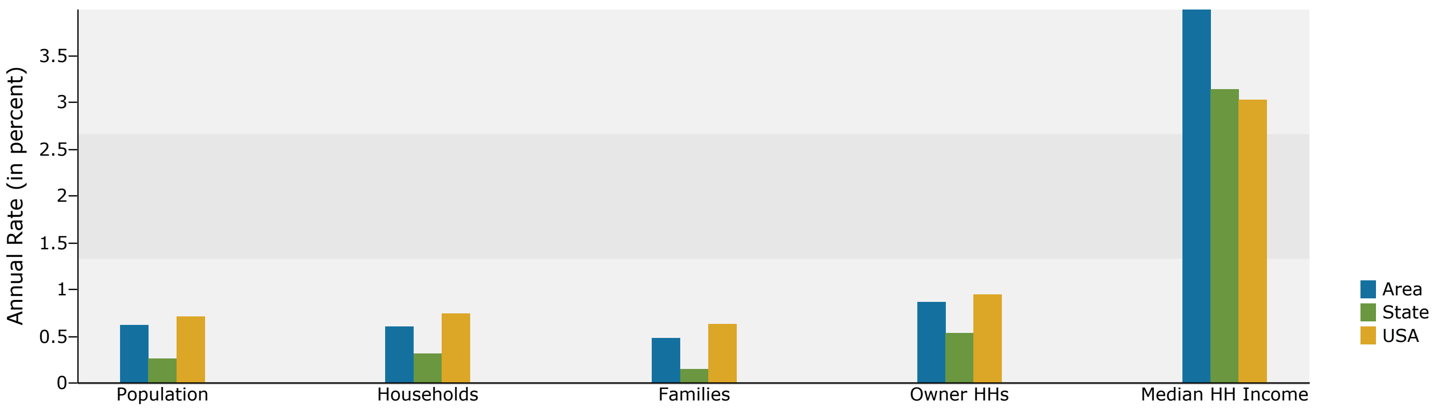
	Census 2010		2013		2018	
Population by Age	Number	Percent	Number	Percent	Number	Percent
0 - 4	13,585	8.3%	13,440	8.1%	13,910	8.1%
5 - 9	13,515	8.3%	13,542	8.2%	13,866	8.1%
10 - 14	12,536	7.7%	13,139	7.9%	14,036	8.2%
15 - 19	11,562	7.1%	11,422	6.9%	11,931	7.0%
20 - 24	10,148	6.2%	10,668	6.4%	9,750	5.7%
25 - 34	23,965	14.7%	23,899	14.4%	23,490	13.7%
35 - 44	24,588	15.1%	24,371	14.7%	25,652	15.0%
45 - 54	22,967	14.1%	22,560	13.6%	21,791	12.7%
55 - 64	16,245	10.0%	17,909	10.8%	18,749	10.9%
65 - 74	7,733	4.8%	9,081	5.5%	11,423	6.7%
75 - 84	4,091	2.5%	4,128	2.5%	4,738	2.8%
85+	1,769	1.1%	1,852	1.1%	1,908	1.1%

	Census 2010		2013		2018	
Race and Ethnicity	Number	Percent	Number	Percent	Number	Percent
White Alone	114,862	70.6%	115,451	69.5%	115,986	67.7%
Black Alone	8,883	5.5%	9,037	5.4%	9,231	5.4%
American Indian Alone	1,389	0.9%	1,446	0.9%	1,605	0.9%
Asian Alone	10,180	6.3%	10,401	6.3%	11,188	6.5%
Pacific Islander Alone	62	0.0%	68	0.0%	72	0.0%
Some Other Race Alone	22,386	13.8%	24,346	14.7%	27,420	16.0%
Two or More Races	4,943	3.0%	5,261	3.2%	5,742	3.4%
Hispanic Origin (Any Race)	58,319	35.8%	63,177	38.1%	71,264	41.6%

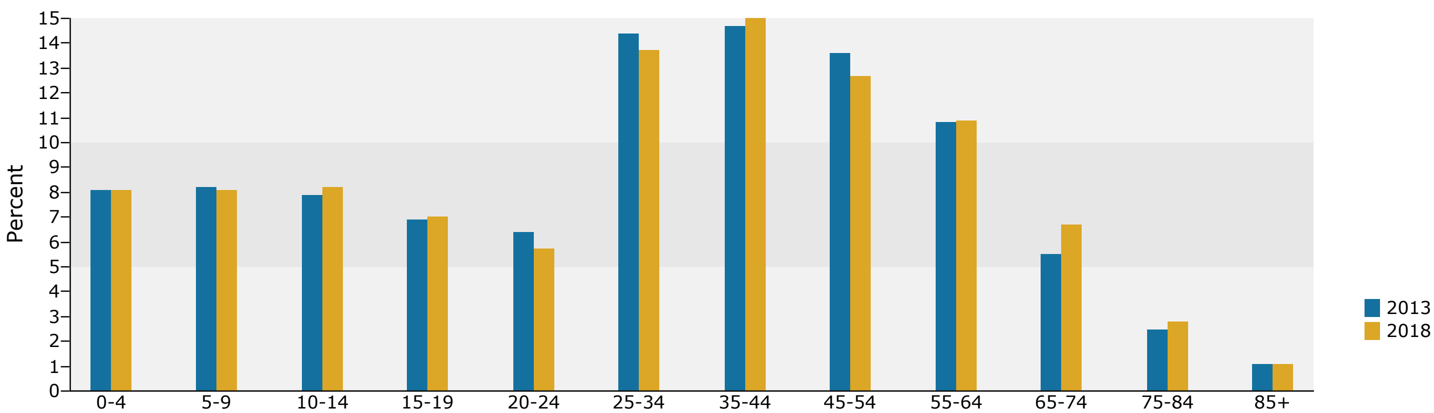
Data Note: Income is expressed in current dollars.
Source: U.S. Census Bureau, Census 2010 Summary File 1. Esri forecasts for 2013 and 2018.

March 17, 2014

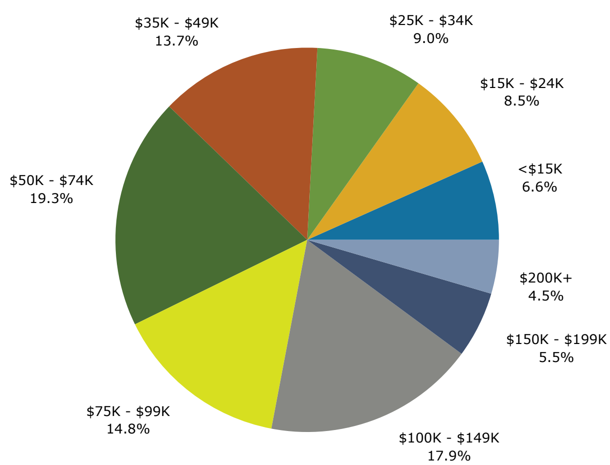
Trends 2013-2018



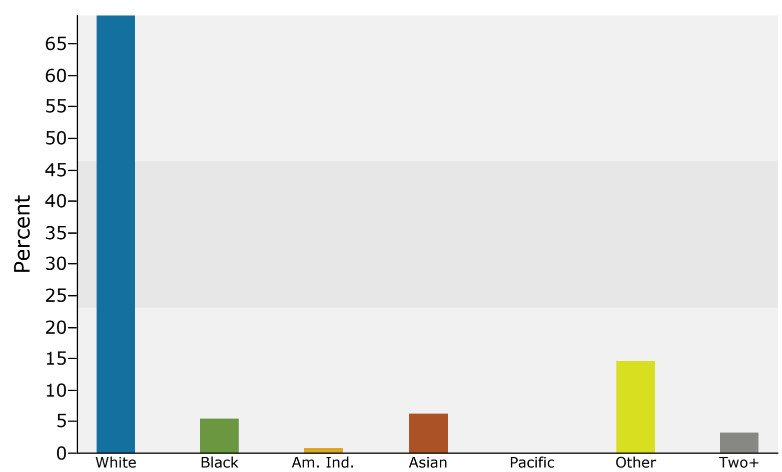
Population by Age



2013 Household Income



2013 Population by Race



2013 Percent Hispanic Origin: 38.1%

Source: U.S. Census Bureau, Census 2010 Summary File 1. Esri forecasts for 2013 and 2018.

March 17, 2014

Demographic and Income Profile

West Dundee Retail Study Area
1, 5 and 10 mile radius
Ring: 10 mile radius

Prepared by Barry Bain
Latitude: 42.098118
Longitude: -88.28705

Summary	Census 2010	2013	2018
Population	519,803	529,479	542,868
Households	175,350	178,568	183,435
Families	133,627	135,312	138,178
Average Household Size	2.95	2.95	2.94
Owner Occupied Housing Units	144,119	144,825	150,150
Renter Occupied Housing Units	31,231	33,742	33,285
Median Age	35.7	36.1	36.7
Trends: 2013 - 2018 Annual Rate	**Area**	**State**	**National**
Population	0.50%	0.26%	0.71%
Households	0.54%	0.32%	0.74%
Families	0.42%	0.15%	0.63%
Owner HHs	0.72%	0.54%	0.94%
Median Household Income	2.45%	3.14%	3.03%

	2013		2018	
Households by Income	Number	Percent	Number	Percent
<$15,000	9,547	5.3%	8,831	4.8%
$15,000 - $24,999	12,435	7.0%	9,260	5.0%
$25,000 - $34,999	12,779	7.2%	11,383	6.2%
$35,000 - $49,999	19,404	10.9%	16,478	9.0%
$50,000 - $74,999	32,948	18.5%	26,858	14.6%
$75,000 - $99,999	28,348	15.9%	35,397	19.3%
$100,000 - $149,999	37,770	21.2%	44,742	24.4%
$150,000 - $199,999	14,031	7.9%	17,791	9.7%
$200,000+	11,302	6.3%	12,691	6.9%
Median Household Income	$76,409		$86,254	
Average Household Income	$94,977		$107,807	
Per Capita Income	$32,168		$36,562	

	Census 2010		2013		2018	
Population by Age	Number	Percent	Number	Percent	Number	Percent
0 - 4	38,694	7.4%	38,096	7.2%	39,250	7.2%
5 - 9	41,506	8.0%	40,962	7.7%	41,729	7.7%
10 - 14	41,333	8.0%	41,997	7.9%	43,735	8.1%
15 - 19	37,133	7.1%	36,416	6.9%	36,488	6.7%
20 - 24	27,381	5.3%	30,128	5.7%	27,527	5.1%
25 - 34	68,310	13.1%	68,581	13.0%	68,252	12.6%
35 - 44	81,471	15.7%	78,877	14.9%	81,896	15.1%
45 - 54	79,392	15.3%	78,230	14.8%	74,551	13.7%
55 - 64	55,968	10.8%	61,334	11.6%	64,475	11.9%
65 - 74	28,849	5.5%	33,733	6.4%	40,818	7.5%
75 - 84	14,256	2.7%	15,141	2.9%	17,672	3.3%
85+	5,510	1.1%	5,985	1.1%	6,475	1.2%
	Census 2010		**2013**		**2018**	
Race and Ethnicity	Number	Percent	Number	Percent	Number	Percent
White Alone	397,038	76.4%	399,542	75.5%	400,063	73.7%
Black Alone	19,824	3.8%	20,674	3.9%	22,004	4.1%
American Indian Alone	3,100	0.6%	3,219	0.6%	3,594	0.7%
Asian Alone	43,916	8.4%	45,402	8.6%	49,071	9.0%
Pacific Islander Alone	148	0.0%	159	0.0%	176	0.0%
Some Other Race Alone	42,573	8.2%	46,278	8.7%	52,225	9.6%
Two or More Races	13,204	2.5%	14,204	2.7%	15,736	2.9%
Hispanic Origin (Any Race)	116,298	22.4%	126,094	23.8%	142,889	26.3%

Data Note: Income is expressed in current dollars.
Source: U.S. Census Bureau, Census 2010 Summary File 1. Esri forecasts for 2013 and 2018.

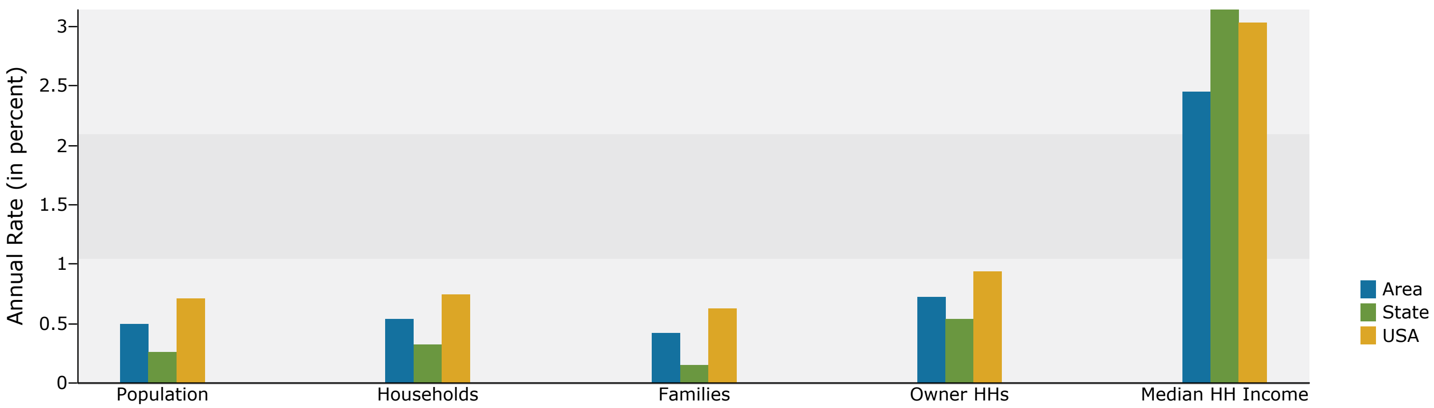
March 17, 2014

Demographic and Income Profile

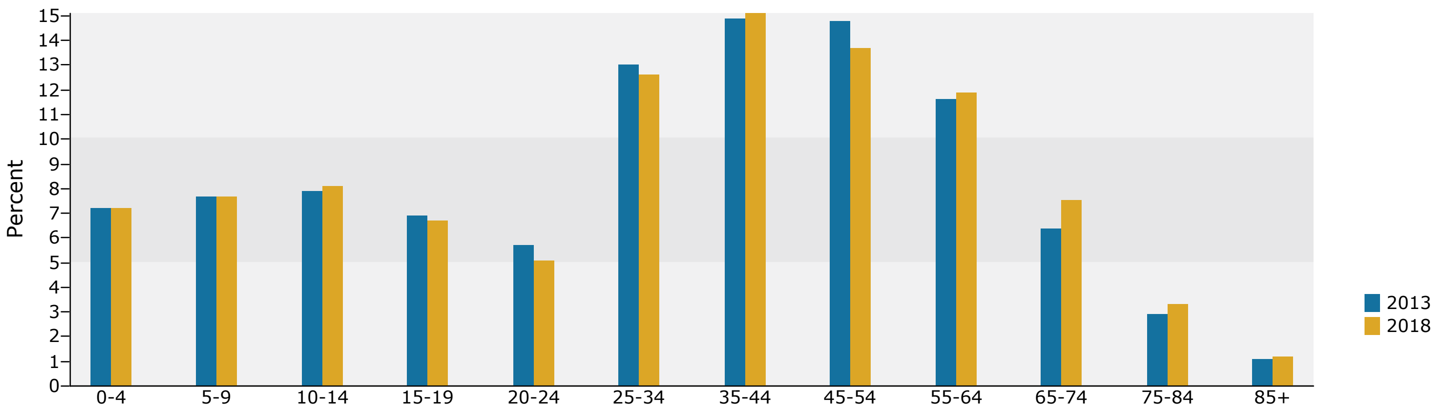
West Dundee Retail Study Area
1, 5 and 10 mile radius
Ring: 10 mile radius

Prepared by Barry Bain
Latitude: 42.098118
Longitude: -88.28705

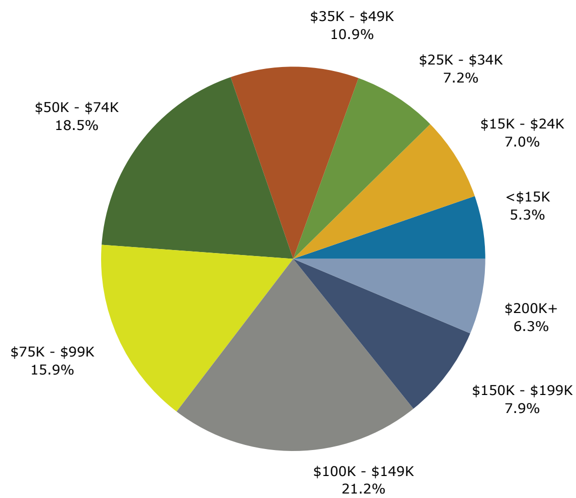
Trends 2013-2018



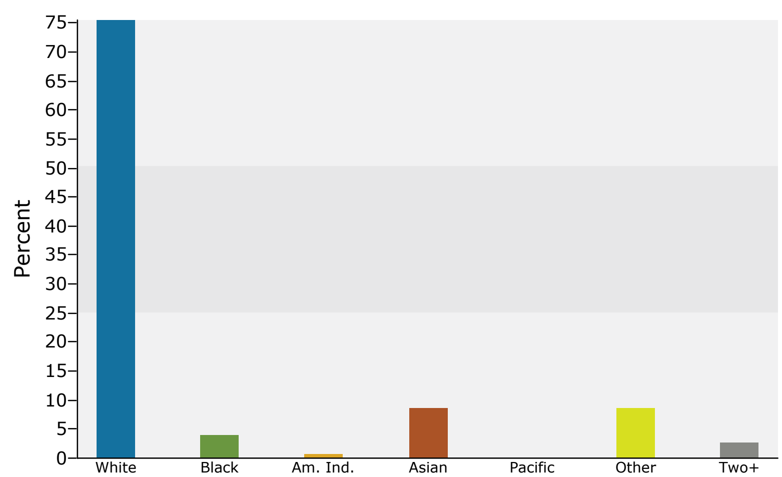
Population by Age



2013 Household Income



2013 Population by Race



2013 Percent Hispanic Origin: 23.8%

Source: U.S. Census Bureau, Census 2010 Summary File 1. Esri forecasts for 2013 and 2018.

March 17, 2014

Retail Market Potential

West Dundee Retail Study Area
1, 5 and 10 mile radius
Ring: 1 mile radius

Prepared by Barry Bain
Latitude: 42.098118
Longitude: -88.28705

Demographic Summary	2013	2018
Population	6,715	6,821
Population 18+	5,301	5,436
Households	2,788	2,835
Median Household Income	$69,036	$81,686

Product/Consumer Behavior	Expected Number Adults/HHs	Percent of Adults/HHs	MPI
Apparel (Adults)			
Bought any men's apparel in last 12 months	2,973	56.1%	113
Bought any women's apparel in last 12 months	2,454	46.3%	102
Bought apparel for child <13 in last 6 months	1,459	27.5%	97
Bought any shoes in last 12 months	2,987	56.4%	108
Bought costume jewelry in last 12 months	1,185	22.4%	107
Bought any fine jewelry in last 12 months	1,182	22.3%	101
Bought a watch in last 12 months	1,000	18.9%	98
Automobiles (Households)			
HH owns/leases any vehicle	2,568	92.1%	107
HH bought/leased new vehicle last 12 mo	338	12.1%	126
Automotive Aftermarket (Adults)			
Bought gasoline in last 6 months	4,881	92.1%	106
Bought/changed motor oil in last 12 months	2,741	51.7%	100
Had tune-up in last 12 months	1,876	35.4%	114
Beverages (Adults)			
Drank bottled water/seltzer in last 6 months	3,423	64.6%	104
Drank regular cola in last 6 months	2,529	47.7%	94
Drank beer/ale in last 6 months	2,558	48.3%	113
Cameras & Film (Adults)			
Bought any camera in last 12 months	726	13.7%	107
Bought film in last 12 months	1,078	20.3%	107
Bought digital camera in last 12 months	443	8.4%	122
Bought memory card for camera in last 12 months	496	9.4%	123
Cell Phones/PDAs & Service (Adults)			
Bought cell/mobile phone/PDA in last 12 months	1,906	35.9%	102
Avg monthly cell/mobile phone/PDA bill: $1-$49	1,235	23.3%	109
Avg monthly cell/mobile phone/PDA bill: $50-99	1,777	33.5%	103
Avg monthly cell/mobile phone/PDA bill: $100+	1,271	24.0%	113
Computers (Households)			
HH owns a personal computer	2,378	85.3%	115
Spent <$500 on most recent home PC purchase	253	9.1%	105
Spent $500-$999 on most recent home PC purchase	577	20.7%	116
Spent $1000-$1499 on most recent home PC purchase	477	17.1%	130
Spent $1500-$1999 on most recent home PC purchase	239	8.6%	120
Spent $2000+ on most recent home PC purchase	204	7.3%	117

Data Note: An MPI (Market Potential Index) measures the relative likelihood of the adults in the specified trade area to exhibit certain consumer behavior or purchasing patterns compared to the U.S. An MPI of 100 represents the U.S. average.
Source: These data are based upon national propensities to use various products and services, applied to local demographic composition. Usage data were collected by GfK MRI in a nationally representative survey of U.S. households. Esri forecasts for 2013 and 2018.

March 17, 2014

Retail Market Potential

West Dundee Retail Study Area
1, 5 and 10 mile radius
Ring: 1 mile radius

Prepared by Barry Bain
Latitude: 42.098118
Longitude: -88.28705

Product/Consumer Behavior	Expected Number Adults/HHs	Percent of Adults/HHs	MPI
Convenience Stores (Adults)			
Shopped at convenience store in last 6 months	3,404	64.2%	107
Bought cigarettes at convenience store in last 30 days	656	12.4%	80
Bought gas at convenience store in last 30 days	1,780	33.6%	101
Spent at convenience store in last 30 days: <$20	680	12.8%	133
Spent at convenience store in last 30 days: $20-39	596	11.2%	111
Spent at convenience store in last 30 days: $40+	1,868	35.2%	99
Entertainment (Adults)			
Attended movies in last 6 months	3,468	65.4%	111
Went to live theater in last 12 months	920	17.4%	131
Went to a bar/night club in last 12 months	1,208	22.8%	119
Dined out in last 12 months	3,146	59.3%	121
Gambled at a casino in last 12 months	1,095	20.7%	129
Visited a theme park in last 12 months	1,303	24.6%	114
DVDs rented in last 30 days: 1	182	3.4%	129
DVDs rented in last 30 days: 2	336	6.3%	137
DVDs rented in last 30 days: 3	219	4.1%	129
DVDs rented in last 30 days: 4	274	5.2%	135
DVDs rented in last 30 days: 5+	788	14.9%	112
DVDs purchased in last 30 days: 1	307	5.8%	116
DVDs purchased in last 30 days: 2	296	5.6%	118
DVDs purchased in last 30 days: 3-4	216	4.1%	88
DVDs purchased in last 30 days: 5+	230	4.3%	84
Spent on toys/games in last 12 months: <$50	317	6.0%	99
Spent on toys/games in last 12 months: $50-$99	132	2.5%	90
Spent on toys/games in last 12 months: $100-$199	419	7.9%	110
Spent on toys/games in last 12 months: $200-$499	673	12.7%	118
Spent on toys/games in last 12 months: $500+	368	6.9%	121
Financial (Adults)			
Have home mortgage (1st)	1,453	27.4%	143
Used ATM/cash machine in last 12 months	3,247	61.3%	121
Own any stock	672	12.7%	138
Own U.S. savings bond	464	8.8%	128
Own shares in mutual fund (stock)	744	14.0%	150
Own shares in mutual fund (bonds)	428	8.1%	137
Used full service brokerage firm in last 12 months	462	8.7%	140
Have savings account	2,429	45.8%	126
Have 401K retirement savings	1,308	24.7%	139
Did banking over the Internet in last 12 months	2,007	37.9%	138
Own any credit/debit card (in own name)	4,385	82.7%	112
Avg monthly credit card expenditures: <$111	864	16.3%	119
Avg monthly credit card expenditures: $111-225	458	8.6%	112
Avg monthly credit card expenditures: $226-450	449	8.5%	113
Avg monthly credit card expenditures: $451-700	414	7.8%	122
Avg monthly credit card expenditures: $701+	935	17.6%	131

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March 17, 2014

Retail Market Potential

West Dundee Retail Study Area
1, 5 and 10 mile radius
Ring: 1 mile radius

Prepared by Barry Bain
Latitude: 42.098118
Longitude: -88.28705

Product/Consumer Behavior	Expected Number Adults/HHs	Percent of Adults/HHs	MPI
Grocery (Adults)			
Used beef (fresh/frozen) in last 6 months	3,921	74.0%	105
Used bread in last 6 months	5,173	97.6%	101
Used chicken/turkey (fresh or frozen) in last 6 months	4,250	80.2%	104
Used fish/seafood (fresh or frozen) in last 6 months	3,038	57.3%	109
Used fresh fruit/vegetables in last 6 months	4,823	91.0%	104
Used fresh milk in last 6 months	4,962	93.6%	103
Health (Adults)			
Exercise at home 2+ times per week	1,865	35.2%	117
Exercise at club 2+ times per week	833	15.7%	126
Visited a doctor in last 12 months	4,380	82.6%	107
Used vitamin/dietary supplement in last 6 months	2,901	54.7%	113
Home (Households)			
Any home improvement in last 12 months	1,033	37.1%	117
Used housekeeper/maid/prof HH cleaning service in the last 12 months	523	18.7%	119
Purchased any HH furnishing in last 12 months	1,016	36.5%	121
Purchased bedding/bath goods in last 12 months	1,600	57.4%	105
Purchased cooking/serving product in last 12 months	807	28.9%	105
Bought any kitchen appliance in last 12 months	533	19.1%	110
Insurance (Adults)			
Currently carry any life insurance	2,911	54.9%	116
Have medical/hospital/accident insurance	4,175	78.8%	110
Carry homeowner insurance	3,264	61.6%	118
Carry renter insurance	340	6.4%	104
Have auto/other vehicle insurance	4,773	90.0%	109
Pets (Households)			
HH owns any pet	1,530	54.9%	107
HH owns any cat	743	26.7%	111
HH owns any dog	1,078	38.7%	103
Reading Materials (Adults)			
Bought book in last 12 months	3,130	59.0%	118
Read any daily newspaper	2,509	47.3%	115
Heavy magazine reader	1,098	20.7%	104
Restaurants (Adults)			
Went to family restaurant/steak house in last 6 mo	4,265	80.4%	112
Went to family restaurant/steak house last mo: <2 times	1,385	26.1%	102
Went to family restaurant/steak house last mo: 2-4 times	1,729	32.6%	121
Went to family restaurant/steak house last mo: 5+ times	1,151	21.7%	112
Went to fast food/drive-in restaurant in last 6 mo	4,804	90.6%	102
Went to fast food/drive-in restaurant <6 times/mo	1,821	34.3%	98
Went to fast food/drive-in restaurant 6-13 times/mo	1,623	30.6%	106
Went to fast food/drive-in restaurant 14+ times/mo	1,360	25.6%	103
Fast food/drive-in last 6 mo: eat in	2,137	40.3%	107
Fast food/drive-in last 6 mo: home delivery	596	11.2%	108
Fast food/drive-in last 6 mo: take-out/drive-thru	2,992	56.4%	108
Fast food/drive-in last 6 mo: take-out/walk-in	1,506	28.4%	116

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March 17, 2014

Retail Market Potential

West Dundee Retail Study Area
1, 5 and 10 mile radius
Ring: 1 mile radius

Prepared by Barry Bain
Latitude: 42.098118
Longitude: -88.28705

Product/Consumer Behavior	Expected Number Adults/HHs	Percent of Adults/HHs	MPI
Telephones & Service (Households)			
HH owns in-home cordless telephone	2,027	72.7%	113
HH average monthly long distance phone bill: <$16	874	31.4%	113
HH average monthly long distance phone bill: $16-25	371	13.3%	116
HH average monthly long distance phone bill: $26-59	291	10.4%	113
HH average monthly long distance phone bill: $60+	110	3.9%	88
Television & Sound Equipment (Adults/Households)			
HH owns 1 TV	434	15.6%	78
HH owns 2 TVs	736	26.4%	100
HH owns 3 TVs	652	23.4%	105
HH owns 4+ TVs	721	25.9%	124
HH subscribes to cable TV	1,940	69.6%	120
HH Purchased audio equipment in last 12 months	274	9.8%	101
HH Purchased CD player in last 12 months	107	3.8%	99
HH Purchased DVD player in last 12 months	282	10.1%	104
HH Purchased MP3 player in last 12 months	630	11.9%	116
HH Purchased video game system in last 12 months	333	12.0%	111
Travel (Adults)			
Domestic travel in last 12 months	3,441	64.9%	124
Took 3+ domestic trips in last 12 months	1,104	20.8%	140
Spent on domestic vacations last 12 mo: <$1000	767	14.5%	115
Spent on domestic vacations last 12 mo: $1000-$1499	456	8.6%	128
Spent on domestic vacations last 12 mo: $1500-$1999	338	6.4%	156
Spent on domestic vacations last 12 mo: $2000-$2999	260	4.9%	118
Spent on domestic vacations last 12 mo: $3000+	379	7.1%	141
Foreign travel in last 3 years	1,775	33.5%	128
Took 3+ foreign trips by plane in last 3 years	321	6.1%	125
Spent on foreign vacations last 12 mo: <$1000	419	7.9%	132
Spent on foreign vacations last 12 mo: $1000-$2999	285	5.4%	131
Spent on foreign vacations last 12 mo: $3000+	295	5.6%	112
Stayed 1+ nights at hotel/motel in last 12 months	2,778	52.4%	129

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March 17, 2014

Retail Market Potential

West Dundee Retail Study Area
1, 5 and 10 mile radius
Ring: 5 mile radius

Prepared by Barry Bain
Latitude: 42.098118
Longitude: -88.28705

Demographic Summary	2013	2018
Population	166,010	171,244
Population 18+	118,958	122,103
Households	53,948	55,621
Median Household Income	$63,328	$76,996

Product/Consumer Behavior	Expected Number Adults/HHs	Percent of Adults/HHs	MPI
Apparel (Adults)			
Bought any men's apparel in last 12 months	62,588	52.6%	106
Bought any women's apparel in last 12 months	54,400	45.7%	101
Bought apparel for child <13 in last 6 months	39,039	32.8%	116
Bought any shoes in last 12 months	63,817	53.6%	103
Bought costume jewelry in last 12 months	25,640	21.6%	103
Bought any fine jewelry in last 12 months	26,774	22.5%	102
Bought a watch in last 12 months	23,012	19.3%	100
Automobiles (Households)			
HH owns/leases any vehicle	48,133	89.2%	104
HH bought/leased new vehicle last 12 mo	6,189	11.5%	119
Automotive Aftermarket (Adults)			
Bought gasoline in last 6 months	105,677	88.8%	102
Bought/changed motor oil in last 12 months	59,034	49.6%	96
Had tune-up in last 12 months	40,382	33.9%	109
Beverages (Adults)			
Drank bottled water/seltzer in last 6 months	79,092	66.5%	107
Drank regular cola in last 6 months	63,043	53.0%	104
Drank beer/ale in last 6 months	53,909	45.3%	107
Cameras & Film (Adults)			
Bought any camera in last 12 months	15,599	13.1%	102
Bought film in last 12 months	22,109	18.6%	98
Bought digital camera in last 12 months	9,094	7.6%	112
Bought memory card for camera in last 12 months	10,374	8.7%	114
Cell Phones/PDAs & Service (Adults)			
Bought cell/mobile phone/PDA in last 12 months	44,231	37.2%	105
Avg monthly cell/mobile phone/PDA bill: $1-$49	23,070	19.4%	91
Avg monthly cell/mobile phone/PDA bill: $50-99	42,089	35.4%	109
Avg monthly cell/mobile phone/PDA bill: $100+	28,652	24.1%	114
Computers (Households)			
HH owns a personal computer	43,876	81.3%	110
Spent <$500 on most recent home PC purchase	4,474	8.3%	96
Spent $500-$999 on most recent home PC purchase	10,098	18.7%	105
Spent $1000-$1499 on most recent home PC purchase	7,946	14.7%	112
Spent $1500-$1999 on most recent home PC purchase	4,384	8.1%	114
Spent $2000+ on most recent home PC purchase	3,912	7.3%	115

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March 17, 2014

West Dundee Retail Study Area
1, 5 and 10 mile radius
Ring: 5 mile radius

Prepared by Barry Bain
Latitude: 42.098118
Longitude: -88.28705

Product/Consumer Behavior	Expected Number Adults/HHs	Percent of Adults/HHs	MPI
Convenience Stores (Adults)			
Shopped at convenience store in last 6 months	73,432	61.7%	103
Bought cigarettes at convenience store in last 30 days	15,411	13.0%	84
Bought gas at convenience store in last 30 days	37,423	31.5%	94
Spent at convenience store in last 30 days: <$20	13,234	11.1%	115
Spent at convenience store in last 30 days: $20-39	12,968	10.9%	107
Spent at convenience store in last 30 days: $40+	40,615	34.1%	96
Entertainment (Adults)			
Attended movies in last 6 months	76,881	64.6%	110
Went to live theater in last 12 months	17,191	14.5%	109
Went to a bar/night club in last 12 months	21,916	18.4%	96
Dined out in last 12 months	60,771	51.1%	104
Gambled at a casino in last 12 months	21,867	18.4%	115
Visited a theme park in last 12 months	31,732	26.7%	124
DVDs rented in last 30 days: 1	3,505	2.9%	111
DVDs rented in last 30 days: 2	5,621	4.7%	102
DVDs rented in last 30 days: 3	4,179	3.5%	110
DVDs rented in last 30 days: 4	5,059	4.3%	111
DVDs rented in last 30 days: 5+	18,777	15.8%	119
DVDs purchased in last 30 days: 1	6,977	5.9%	118
DVDs purchased in last 30 days: 2	5,809	4.9%	103
DVDs purchased in last 30 days: 3-4	5,606	4.7%	102
DVDs purchased in last 30 days: 5+	6,423	5.4%	104
Spent on toys/games in last 12 months: <$50	7,535	6.3%	104
Spent on toys/games in last 12 months: $50-$99	3,524	3.0%	108
Spent on toys/games in last 12 months: $100-$199	8,972	7.5%	105
Spent on toys/games in last 12 months: $200-$499	13,764	11.6%	107
Spent on toys/games in last 12 months: $500+	7,556	6.4%	111
Financial (Adults)			
Have home mortgage (1st)	26,211	22.0%	115
Used ATM/cash machine in last 12 months	66,388	55.8%	110
Own any stock	11,517	9.7%	105
Own U.S. savings bond	8,349	7.0%	103
Own shares in mutual fund (stock)	12,232	10.3%	110
Own shares in mutual fund (bonds)	7,368	6.2%	105
Used full service brokerage firm in last 12 months	7,738	6.5%	105
Have savings account	44,685	37.6%	104
Have 401K retirement savings	23,700	19.9%	113
Did banking over the Internet in last 12 months	37,599	31.6%	115
Own any credit/debit card (in own name)	89,536	75.3%	102
Avg monthly credit card expenditures: <$111	15,742	13.2%	96
Avg monthly credit card expenditures: $111-225	9,303	7.8%	101
Avg monthly credit card expenditures: $226-450	9,435	7.9%	106
Avg monthly credit card expenditures: $451-700	8,307	7.0%	110
Avg monthly credit card expenditures: $701+	18,528	15.6%	116

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March 17, 2014

Retail Market Potential

West Dundee Retail Study Area
1, 5 and 10 mile radius
Ring: 5 mile radius

Prepared by Barry Bain
Latitude: 42.098118
Longitude: -88.28705

Product/Consumer Behavior	Expected Number Adults/HHs	Percent of Adults/HHs	MPI
Grocery (Adults)			
Used beef (fresh/frozen) in last 6 months	85,377	71.8%	102
Used bread in last 6 months	114,510	96.3%	100
Used chicken/turkey (fresh or frozen) in last 6 months	93,044	78.2%	101
Used fish/seafood (fresh or frozen) in last 6 months	64,683	54.4%	103
Used fresh fruit/vegetables in last 6 months	105,615	88.8%	102
Used fresh milk in last 6 months	109,326	91.9%	101
Health (Adults)			
Exercise at home 2+ times per week	37,088	31.2%	104
Exercise at club 2+ times per week	17,953	15.1%	121
Visited a doctor in last 12 months	91,034	76.5%	99
Used vitamin/dietary supplement in last 6 months	57,475	48.3%	100
Home (Households)			
Any home improvement in last 12 months	18,076	33.5%	106
Used housekeeper/maid/prof HH cleaning service in the last 12 months	9,775	18.1%	115
Purchased any HH furnishing in last 12 months	16,959	31.4%	105
Purchased bedding/bath goods in last 12 months	29,997	55.6%	102
Purchased cooking/serving product in last 12 months	15,383	28.5%	104
Bought any kitchen appliance in last 12 months	9,519	17.6%	101
Insurance (Adults)			
Currently carry any life insurance	55,528	46.7%	98
Have medical/hospital/accident insurance	84,640	71.2%	99
Carry homeowner insurance	64,013	53.8%	103
Carry renter insurance	6,106	5.1%	83
Have auto/other vehicle insurance	102,229	85.9%	104
Pets (Households)			
HH owns any pet	29,069	53.9%	105
HH owns any cat	11,766	21.8%	91
HH owns any dog	21,806	40.4%	107
Reading Materials (Adults)			
Bought book in last 12 months	62,127	52.2%	104
Read any daily newspaper	44,753	37.6%	91
Heavy magazine reader	24,088	20.2%	102
Restaurants (Adults)			
Went to family restaurant/steak house in last 6 mo	90,784	76.3%	106
Went to family restaurant/steak house last mo: <2 times	31,206	26.2%	102
Went to family restaurant/steak house last mo: 2-4 times	34,304	28.8%	107
Went to family restaurant/steak house last mo: 5+ times	25,273	21.2%	110
Went to fast food/drive-in restaurant in last 6 mo	107,719	90.6%	102
Went to fast food/drive-in restaurant <6 times/mo	40,536	34.1%	97
Went to fast food/drive-in restaurant 6-13 times/mo	35,622	29.9%	104
Went to fast food/drive-in restaurant 14+ times/mo	31,562	26.5%	107
Fast food/drive-in last 6 mo: eat in	46,437	39.0%	104
Fast food/drive-in last 6 mo: home delivery	14,796	12.4%	119
Fast food/drive-in last 6 mo: take-out/drive-thru	63,898	53.7%	103
Fast food/drive-in last 6 mo: take-out/walk-in	30,083	25.3%	103

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March 17, 2014

Retail Market Potential

West Dundee Retail Study Area
1, 5 and 10 mile radius
Ring: 5 mile radius

Prepared by Barry Bain
Latitude: 42.098118
Longitude: -88.28705

Product/Consumer Behavior	Expected Number Adults/HHs	Percent of Adults/HHs	MPI
Telephones & Service (Households)			
HH owns in-home cordless telephone	36,645	67.9%	105
HH average monthly long distance phone bill: <$16	14,795	27.4%	99
HH average monthly long distance phone bill: $16-25	6,112	11.3%	99
HH average monthly long distance phone bill: $26-59	5,350	9.9%	108
HH average monthly long distance phone bill: $60+	2,576	4.8%	107
Television & Sound Equipment (Adults/Households)			
HH owns 1 TV	8,909	16.5%	83
HH owns 2 TVs	13,147	24.4%	93
HH owns 3 TVs	13,184	24.4%	109
HH owns 4+ TVs	13,395	24.8%	119
HH subscribes to cable TV	33,114	61.4%	106
HH Purchased audio equipment in last 12 months	5,587	10.4%	106
HH Purchased CD player in last 12 months	2,143	4.0%	103
HH Purchased DVD player in last 12 months	5,647	10.5%	108
HH Purchased MP3 player in last 12 months	14,927	12.5%	123
HH Purchased video game system in last 12 months	7,290	13.5%	125
Travel (Adults)			
Domestic travel in last 12 months	65,923	55.4%	106
Took 3+ domestic trips in last 12 months	19,328	16.2%	109
Spent on domestic vacations last 12 mo: <$1000	15,048	12.6%	100
Spent on domestic vacations last 12 mo: $1000-$1499	8,020	6.7%	100
Spent on domestic vacations last 12 mo: $1500-$1999	6,014	5.1%	123
Spent on domestic vacations last 12 mo: $2000-$2999	5,580	4.7%	113
Spent on domestic vacations last 12 mo: $3000+	6,931	5.8%	115
Foreign travel in last 3 years	37,611	31.6%	121
Took 3+ foreign trips by plane in last 3 years	6,657	5.6%	116
Spent on foreign vacations last 12 mo: <$1000	8,292	7.0%	116
Spent on foreign vacations last 12 mo: $1000-$2999	5,633	4.7%	115
Spent on foreign vacations last 12 mo: $3000+	6,555	5.5%	111
Stayed 1+ nights at hotel/motel in last 12 months	51,689	43.5%	107

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March 17, 2014

Retail Market Potential

West Dundee Retail Study Area
1, 5 and 10 mile radius
Ring: 10 mile radius

Prepared by Barry Bain
Latitude: 42.098118
Longitude: -88.28705

Demographic Summary	2013	2018
Population	529,479	542,868
Population 18+	385,547	395,027
Households	178,568	183,435
Median Household Income	$76,409	$86,254

Product/Consumer Behavior	Expected Number Adults/HHs	Percent of Adults/HHs	MPI
Apparel (Adults)			
Bought any men's apparel in last 12 months	206,141	53.5%	107
Bought any women's apparel in last 12 months	182,759	47.4%	104
Bought apparel for child <13 in last 6 months	125,651	32.6%	115
Bought any shoes in last 12 months	214,886	55.7%	107
Bought costume jewelry in last 12 months	88,818	23.0%	110
Bought any fine jewelry in last 12 months	87,865	22.8%	104
Bought a watch in last 12 months	74,930	19.4%	101
Automobiles (Households)			
HH owns/leases any vehicle	163,978	91.8%	107
HH bought/leased new vehicle last 12 mo	23,381	13.1%	136
Automotive Aftermarket (Adults)			
Bought gasoline in last 6 months	352,586	91.5%	105
Bought/changed motor oil in last 12 months	193,291	50.1%	97
Had tune-up in last 12 months	131,961	34.2%	110
Beverages (Adults)			
Drank bottled water/seltzer in last 6 months	259,732	67.4%	109
Drank regular cola in last 6 months	192,286	49.9%	98
Drank beer/ale in last 6 months	178,983	46.4%	109
Cameras & Film (Adults)			
Bought any camera in last 12 months	52,747	13.7%	107
Bought film in last 12 months	71,278	18.5%	97
Bought digital camera in last 12 months	32,181	8.3%	122
Bought memory card for camera in last 12 months	35,756	9.3%	122
Cell Phones/PDAs & Service (Adults)			
Bought cell/mobile phone/PDA in last 12 months	145,232	37.7%	107
Avg monthly cell/mobile phone/PDA bill: $1-$49	77,314	20.1%	94
Avg monthly cell/mobile phone/PDA bill: $50-99	136,350	35.4%	109
Avg monthly cell/mobile phone/PDA bill: $100+	100,238	26.0%	123
Computers (Households)			
HH owns a personal computer	153,925	86.2%	116
Spent <$500 on most recent home PC purchase	14,981	8.4%	97
Spent $500-$999 on most recent home PC purchase	36,186	20.3%	114
Spent $1000-$1499 on most recent home PC purchase	28,961	16.2%	124
Spent $1500-$1999 on most recent home PC purchase	16,072	9.0%	126
Spent $2000+ on most recent home PC purchase	14,922	8.4%	133

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March 17, 2014

Retail Market Potential

West Dundee Retail Study Area
1, 5 and 10 mile radius
Ring: 10 mile radius

Prepared by Barry Bain
Latitude: 42.098118
Longitude: -88.28705

Product/Consumer Behavior	Expected Number Adults/HHs	Percent of Adults/HHs	MPI
Convenience Stores (Adults)			
Shopped at convenience store in last 6 months	238,112	61.8%	103
Bought cigarettes at convenience store in last 30 days	47,617	12.4%	80
Bought gas at convenience store in last 30 days	125,681	32.6%	98
Spent at convenience store in last 30 days: <$20	42,379	11.0%	114
Spent at convenience store in last 30 days: $20-39	41,364	10.7%	106
Spent at convenience store in last 30 days: $40+	132,624	34.4%	96
Entertainment (Adults)			
Attended movies in last 6 months	257,022	66.7%	113
Went to live theater in last 12 months	63,476	16.5%	125
Went to a bar/night club in last 12 months	77,826	20.2%	106
Dined out in last 12 months	213,098	55.3%	112
Gambled at a casino in last 12 months	71,375	18.5%	115
Visited a theme park in last 12 months	107,009	27.8%	129
DVDs rented in last 30 days: 1	11,784	3.1%	115
DVDs rented in last 30 days: 2	20,487	5.3%	115
DVDs rented in last 30 days: 3	14,482	3.8%	117
DVDs rented in last 30 days: 4	17,291	4.5%	117
DVDs rented in last 30 days: 5+	63,118	16.4%	124
DVDs purchased in last 30 days: 1	23,964	6.2%	125
DVDs purchased in last 30 days: 2	20,556	5.3%	113
DVDs purchased in last 30 days: 3-4	18,303	4.7%	103
DVDs purchased in last 30 days: 5+	18,810	4.9%	94
Spent on toys/games in last 12 months: <$50	24,229	6.3%	104
Spent on toys/games in last 12 months: $50-$99	10,602	2.7%	100
Spent on toys/games in last 12 months: $100-$199	28,793	7.5%	104
Spent on toys/games in last 12 months: $200-$499	46,950	12.2%	113
Spent on toys/games in last 12 months: $500+	28,212	7.3%	128
Financial (Adults)			
Have home mortgage (1st)	100,669	26.1%	136
Used ATM/cash machine in last 12 months	231,488	60.0%	118
Own any stock	45,818	11.9%	129
Own U.S. savings bond	30,979	8.0%	118
Own shares in mutual fund (stock)	48,196	12.5%	133
Own shares in mutual fund (bonds)	28,941	7.5%	127
Used full service brokerage firm in last 12 months	30,116	7.8%	126
Have savings account	159,708	41.4%	114
Have 401K retirement savings	89,615	23.2%	131
Did banking over the Internet in last 12 months	138,136	35.8%	131
Own any credit/debit card (in own name)	310,085	80.4%	109
Avg monthly credit card expenditures: <$111	51,233	13.3%	97
Avg monthly credit card expenditures: $111-225	31,851	8.3%	107
Avg monthly credit card expenditures: $226-450	32,621	8.5%	113
Avg monthly credit card expenditures: $451-700	28,999	7.5%	118
Avg monthly credit card expenditures: $701+	73,612	19.1%	142

Data Note: An MPI (Market Potential Index) measures the relative likelihood of the adults in the specified trade area to exhibit certain consumer behavior or purchasing patterns compared to the U.S. An MPI of 100 represents the U.S. average.
Source: These data are based upon national propensities to use various products and services, applied to local demographic composition. Usage data were collected by GfK MRI in a nationally representative survey of U.S. households. Esri forecasts for 2013 and 2018.

March 17, 2014

Retail Market Potential

West Dundee Retail Study Area
1, 5 and 10 mile radius
Ring: 10 mile radius

Prepared by Barry Bain
Latitude: 42.098118
Longitude: -88.28705

Product/Consumer Behavior	Expected Number Adults/HHs	Percent of Adults/HHs	MPI
Grocery (Adults)			
Used beef (fresh/frozen) in last 6 months	281,119	72.9%	103
Used bread in last 6 months	372,747	96.7%	100
Used chicken/turkey (fresh or frozen) in last 6 months	306,727	79.6%	103
Used fish/seafood (fresh or frozen) in last 6 months	215,328	55.8%	106
Used fresh fruit/vegetables in last 6 months	345,208	89.5%	103
Used fresh milk in last 6 months	355,498	92.2%	102
Health (Adults)			
Exercise at home 2+ times per week	128,136	33.2%	111
Exercise at club 2+ times per week	66,125	17.2%	138
Visited a doctor in last 12 months	305,973	79.4%	103
Used vitamin/dietary supplement in last 6 months	197,639	51.3%	106
Home (Households)			
Any home improvement in last 12 months	65,537	36.7%	116
Used housekeeper/maid/prof HH cleaning service in the last 12 months	36,701	20.6%	131
Purchased any HH furnishing in last 12 months	59,871	33.5%	112
Purchased bedding/bath goods in last 12 months	100,998	56.6%	103
Purchased cooking/serving product in last 12 months	51,820	29.0%	106
Bought any kitchen appliance in last 12 months	33,582	18.8%	108
Insurance (Adults)			
Currently carry any life insurance	201,058	52.1%	110
Have medical/hospital/accident insurance	292,271	75.8%	106
Carry homeowner insurance	232,789	60.4%	115
Carry renter insurance	20,694	5.4%	87
Have auto/other vehicle insurance	341,615	88.6%	107
Pets (Households)			
HH owns any pet	100,036	56.0%	109
HH owns any cat	41,103	23.0%	96
HH owns any dog	74,940	42.0%	112
Reading Materials (Adults)			
Bought book in last 12 months	217,498	56.4%	112
Read any daily newspaper	157,074	40.7%	99
Heavy magazine reader	83,659	21.7%	109
Restaurants (Adults)			
Went to family restaurant/steak house in last 6 mo	305,279	79.2%	110
Went to family restaurant/steak house last mo: <2 times	102,640	26.6%	104
Went to family restaurant/steak house last mo: 2-4 times	115,659	30.0%	111
Went to family restaurant/steak house last mo: 5+ times	86,989	22.6%	116
Went to fast food/drive-in restaurant in last 6 mo	351,545	91.2%	103
Went to fast food/drive-in restaurant <6 times/mo	129,915	33.7%	96
Went to fast food/drive-in restaurant 6-13 times/mo	118,738	30.8%	107
Went to fast food/drive-in restaurant 14+ times/mo	102,891	26.7%	107
Fast food/drive-in last 6 mo: eat in	152,899	39.7%	105
Fast food/drive-in last 6 mo: home delivery	46,799	12.1%	116
Fast food/drive-in last 6 mo: take-out/drive-thru	216,824	56.2%	108
Fast food/drive-in last 6 mo: take-out/walk-in	100,337	26.0%	106

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March 17, 2014

Retail Market Potential

West Dundee Retail Study Area
1, 5 and 10 mile radius
Ring: 10 mile radius

Prepared by Barry Bain
Latitude: 42.098118
Longitude: -88.28705

Product/Consumer Behavior	Expected Number Adults/HHs	Percent of Adults/HHs	MPI
Telephones & Service (Households)			
HH owns in-home cordless telephone	127,168	71.2%	111
HH average monthly long distance phone bill: <$16	51,023	28.6%	103
HH average monthly long distance phone bill: $16-25	21,588	12.1%	106
HH average monthly long distance phone bill: $26-59	19,507	10.9%	119
HH average monthly long distance phone bill: $60+	9,153	5.1%	115
Television & Sound Equipment (Adults/Households)			
HH owns 1 TV	25,895	14.5%	73
HH owns 2 TVs	43,242	24.2%	92
HH owns 3 TVs	44,360	24.8%	111
HH owns 4+ TVs	48,777	27.3%	131
HH subscribes to cable TV	115,579	64.7%	111
HH Purchased audio equipment in last 12 months	18,736	10.5%	108
HH Purchased CD player in last 12 months	7,052	3.9%	102
HH Purchased DVD player in last 12 months	18,904	10.6%	109
HH Purchased MP3 player in last 12 months	51,346	13.3%	130
HH Purchased video game system in last 12 months	24,698	13.8%	128
Travel (Adults)			
Domestic travel in last 12 months	237,296	61.5%	118
Took 3+ domestic trips in last 12 months	72,356	18.8%	126
Spent on domestic vacations last 12 mo: <$1000	51,053	13.2%	105
Spent on domestic vacations last 12 mo: $1000-$1499	30,416	7.9%	117
Spent on domestic vacations last 12 mo: $1500-$1999	21,758	5.6%	138
Spent on domestic vacations last 12 mo: $2000-$2999	21,402	5.6%	134
Spent on domestic vacations last 12 mo: $3000+	26,947	7.0%	138
Foreign travel in last 3 years	133,431	34.6%	133
Took 3+ foreign trips by plane in last 3 years	25,520	6.6%	137
Spent on foreign vacations last 12 mo: <$1000	28,918	7.5%	125
Spent on foreign vacations last 12 mo: $1000-$2999	19,518	5.1%	123
Spent on foreign vacations last 12 mo: $3000+	26,432	6.9%	138
Stayed 1+ nights at hotel/motel in last 12 months	190,274	49.4%	122

Data Note: An MPI (Market Potential Index) measures the relative likelihood of the adults in the specified trade area to exhibit certain consumer behavior or purchasing patterns compared to the U.S. An MPI of 100 represents the U.S. average.
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March 17, 2014

Restaurant Market Potential

West Dundee Retail Study Area
1, 5 and 10 mile radius
Ring: 1 mile radius

Prepared by Barry Bain
Latitude: 42.098118
Longitude: -88.28705

Demographic Summary	2013	2018
Population	6,715	6,821
Population 18+	5,301	5,436
Households	2,788	2,835
Median Household Income	$69,036	$81,686

Product/Consumer Behavior	Expected Number of Adults	Percent	MPI
Went to family restaurant/steak house in last 6 months	4,265	80.5%	112
Family restaurant/steak house last month: <2 times	1,385	26.1%	102
Family restaurant/steak house last month: 2-4 times	1,729	32.6%	121
Family restaurant/steak house last month: 5+ times	1,151	21.7%	112
Family restaurant/steak house last 6 months: breakfast	800	15.1%	115
Family restaurant/steak house last 6 months: lunch	1,475	27.8%	112
Family restaurant/steak house last 6 months: snack	154	2.9%	103
Family restaurant/steak house last 6 months: dinner	3,343	63.1%	120
Family restaurant/steak house last 6 months: weekday	2,543	48.0%	125
Family restaurant/steak house last 6 months: weekend	2,681	50.6%	114
Family restaurant/steak house last 6 months: Applebee's	1,596	30.1%	120
Family restaurant/steak house last 6 months: Bennigan's	150	2.8%	127
Family restaurant/steak house last 6 months: Bob Evans Farm	245	4.6%	102
Family restaurant/steak house last 6 months: Cheesecake Factory	446	8.4%	126
Family restaurant/steak house last 6 months: Chili's Grill & Bar	766	14.5%	124
Family restaurant/steak house last 6 months: Cracker Barrel	640	12.1%	110
Family restaurant/steak house last 6 months: Denny's	524	9.9%	109
Family restaurant/steak house last 6 months: Friendly's	331	6.2%	159
Family restaurant/steak house last 6 months: Golden Corral	283	5.3%	74
Family restaurant/steak house last 6 months: Intl Hse of Pancakes	709	13.4%	114
Family restaurant/steak house last 6 months: Lone Star Steakhouse	158	3.0%	111
Family restaurant/steak house last 6 months: Old Country Buffet	150	2.8%	101
Family restaurant/steak house last 6 months: Olive Garden	1,281	24.2%	136
Family restaurant/steak house last 6 months: Outback Steakhouse	825	15.6%	136
Family restaurant/steak house last 6 months: Perkins	162	3.1%	85
Family restaurant/steak house last 6 months: Red Lobster	817	15.4%	115
Family restaurant/steak house last 6 months: Red Robin	501	9.5%	168
Family restaurant/steak house last 6 months: Ruby Tuesday	566	10.7%	129
Family restaurant/steak house last 6 months: Ryan's	86	1.6%	44
Family restaurant/steak house last 6 months: Sizzler	106	2.0%	65
Family restaurant/steak house last 6 months: T.G.I. Friday's	710	13.4%	130
Went to fast food/drive-in restaurant in last 6 months	4,804	90.6%	102
Went to fast food/drive-in restaurant <6 times/month	1,821	34.4%	98
Went to fast food/drive-in restaurant 6-13 times/month	1,623	30.6%	106
Went to fast food/drive-in restaurant 14+ times/month	1,360	25.7%	103
Fast food/drive-in last 6 months: breakfast	1,595	30.1%	110
Fast food/drive-in last 6 months: lunch	3,428	64.7%	110
Fast food/drive-in last 6 months: snack	1,081	20.4%	117
Fast food/drive-in last 6 months: dinner	2,759	52.0%	108

Data Note: An MPI (Market Potential Index) measures the relative likelihood of the adults in the specified trade area to exhibit certain consumer behavior or purchasing patterns compared to the U.S. An MPI of 100 represents the U.S. average.
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March 17, 2014

Restaurant Market Potential

West Dundee Retail Study Area
1, 5 and 10 mile radius
Ring: 1 mile radius

Prepared by Barry Bain
Latitude: 42.098118
Longitude: -88.28705

Product/Consumer Behavior	Expected Number of Adults	Percent	MPI
Fast food/drive-in last 6 months: weekday	3,872	73.0%	110
Fast food/drive-in last 6 months: weekend	2,668	50.3%	104
Fast food/drive-in last 6 months: A & W	267	5.0%	111
Fast food/drive-in last 6 months: Arby's	1,280	24.1%	118
Fast food/drive-in last 6 months: Boston Market	378	7.1%	149
Fast food/drive-in last 6 months: Burger King	2,091	39.4%	110
Fast food/drive-in last 6 months: Captain D's	183	3.5%	68
Fast food/drive-in last 6 months: Carl's Jr.	292	5.5%	87
Fast food/drive-in last 6 months: Checkers	128	2.4%	76
Fast food/drive-in last 6 months: Chick-fil-A	908	17.1%	133
Fast food/drive-in last 6 months: Chipotle Mex. Grill	482	9.1%	148
Fast food/drive-in last 6 months: Chuck E. Cheese’s	238	4.5%	100
Fast food/drive-in last 6 months: Church's Fr. Chicken	143	2.7%	63
Fast food/drive-in last 6 months: Dairy Queen	980	18.5%	117
Fast food/drive-in last 6 months: Del Taco	193	3.6%	107
Fast food/drive-in last 6 months: Domino's Pizza	637	12.0%	89
Fast food/drive-in last 6 months: Dunkin' Donuts	888	16.8%	146
Fast food/drive-in last 6 months: Fuddruckers	176	3.3%	117
Fast food/drive-in last 6 months: Hardee's	271	5.1%	76
Fast food/drive-in last 6 months: Jack in the Box	554	10.5%	99
Fast food/drive-in last 6 months: KFC	1,425	26.9%	98
Fast food/drive-in last 6 months: Little Caesars	340	6.4%	88
Fast food/drive-in last 6 months: Long John Silver's	249	4.7%	75
Fast food/drive-in last 6 months: McDonald's	3,056	57.6%	104
Fast food/drive-in last 6 months: Panera Bread	864	16.3%	167
Fast food/drive-in last 6 months: Papa John's	549	10.4%	119
Fast food/drive-in last 6 months: Pizza Hut	1,080	20.4%	93
Fast food/drive-in last 6 months: Popeyes	341	6.4%	88
Fast food/drive-in last 6 months: Quiznos	624	11.8%	129
Fast food/drive-in last 6 months: Sonic Drive-In	571	10.8%	92
Fast food/drive-in last 6 months: Starbucks	1,094	20.6%	137
Fast food/drive-in last 6 months: Steak n Shake	283	5.3%	106
Fast food/drive-in last 6 months: Subway	1,765	33.3%	105
Fast food/drive-in last 6 months: Taco Bell	1,819	34.3%	107
Fast food/drive-in last 6 months: Wendy's	1,793	33.8%	109
Fast food/drive-in last 6 months: Whataburger	223	4.2%	86
Fast food/drive-in last 6 months: White Castle	187	3.5%	89
Fast food/drive-in last 6 months: eat in	2,137	40.3%	107
Fast food/drive-in last 6 months: home delivery	596	11.2%	108
Fast food/drive-in last 6 months: take-out/drive-thru	2,992	56.4%	108
Fast food/drive-in last 6 months: take-out/walk-in	1,506	28.4%	116

Data Note: An MPI (Market Potential Index) measures the relative likelihood of the adults in the specified trade area to exhibit certain consumer behavior or purchasing patterns compared to the U.S. An MPI of 100 represents the U.S. average.
Source: These data are based upon national propensities to use various products and services, applied to local demographic composition. Usage data were collected by GfK MRI in a nationally representative survey of U.S. households. Esri forecasts for 2013 and 2018.

March 17, 2014

Restaurant Market Potential

West Dundee Retail Study Area
1, 5 and 10 mile radius
Ring: 5 mile radius

Prepared by Barry Bain
Latitude: 42.098118
Longitude: -88.28705

Demographic Summary		2013	2018
Population		166,010	171,244
Population 18+		118,958	122,103
Households		53,948	55,621
Median Household Income		$63,328	$76,996

Product/Consumer Behavior	Expected Number of Adults	Percent	MPI
Went to family restaurant/steak house in last 6 months	90,784	76.3%	106
Family restaurant/steak house last month: <2 times	31,206	26.2%	102
Family restaurant/steak house last month: 2-4 times	34,304	28.8%	107
Family restaurant/steak house last month: 5+ times	25,273	21.2%	110
Family restaurant/steak house last 6 months: breakfast	17,929	15.1%	115
Family restaurant/steak house last 6 months: lunch	30,993	26.1%	105
Family restaurant/steak house last 6 months: snack	4,312	3.6%	129
Family restaurant/steak house last 6 months: dinner	67,206	56.5%	107
Family restaurant/steak house last 6 months: weekday	47,939	40.3%	105
Family restaurant/steak house last 6 months: weekend	58,304	49.0%	110
Family restaurant/steak house last 6 months: Applebee's	31,174	26.2%	104
Family restaurant/steak house last 6 months: Bennigan's	3,223	2.7%	122
Family restaurant/steak house last 6 months: Bob Evans Farm	4,058	3.4%	76
Family restaurant/steak house last 6 months: Cheesecake Factory	10,179	8.6%	128
Family restaurant/steak house last 6 months: Chili's Grill & Bar	17,628	14.8%	127
Family restaurant/steak house last 6 months: Cracker Barrel	11,664	9.8%	89
Family restaurant/steak house last 6 months: Denny's	14,555	12.2%	135
Family restaurant/steak house last 6 months: Friendly's	3,967	3.3%	85
Family restaurant/steak house last 6 months: Golden Corral	7,692	6.5%	90
Family restaurant/steak house last 6 months: Intl Hse of Pancakes	16,630	14.0%	120
Family restaurant/steak house last 6 months: Lone Star Steakhouse	2,974	2.5%	93
Family restaurant/steak house last 6 months: Old Country Buffet	2,984	2.5%	89
Family restaurant/steak house last 6 months: Olive Garden	24,854	20.9%	118
Family restaurant/steak house last 6 months: Outback Steakhouse	14,869	12.5%	110
Family restaurant/steak house last 6 months: Perkins	3,178	2.7%	74
Family restaurant/steak house last 6 months: Red Lobster	17,164	14.4%	108
Family restaurant/steak house last 6 months: Red Robin	9,525	8.0%	142
Family restaurant/steak house last 6 months: Ruby Tuesday	10,462	8.8%	106
Family restaurant/steak house last 6 months: Ryan's	2,653	2.2%	60
Family restaurant/steak house last 6 months: Sizzler	5,458	4.6%	150
Family restaurant/steak house last 6 months: T.G.I. Friday's	14,466	12.2%	118
Went to fast food/drive-in restaurant in last 6 months	107,719	90.6%	102
Went to fast food/drive-in restaurant <6 times/month	40,536	34.1%	97
Went to fast food/drive-in restaurant 6-13 times/month	35,622	29.9%	104
Went to fast food/drive-in restaurant 14+ times/month	31,562	26.5%	107
Fast food/drive-in last 6 months: breakfast	33,832	28.4%	104
Fast food/drive-in last 6 months: lunch	72,124	60.6%	103
Fast food/drive-in last 6 months: snack	22,503	18.9%	109
Fast food/drive-in last 6 months: dinner	59,014	49.6%	103

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March 17, 2014

Restaurant Market Potential

West Dundee Retail Study Area
1, 5 and 10 mile radius
Ring: 5 mile radius

Prepared by Barry Bain
Latitude: 42.098118
Longitude: -88.28705

Product/Consumer Behavior	Expected Number of Adults	Percent	MPI
Fast food/drive-in last 6 months: weekday	78,640	66.1%	100
Fast food/drive-in last 6 months: weekend	61,905	52.0%	108
Fast food/drive-in last 6 months: A & W	5,863	4.9%	109
Fast food/drive-in last 6 months: Arby's	23,125	19.4%	95
Fast food/drive-in last 6 months: Boston Market	6,925	5.8%	121
Fast food/drive-in last 6 months: Burger King	42,715	35.9%	100
Fast food/drive-in last 6 months: Captain D's	3,910	3.3%	65
Fast food/drive-in last 6 months: Carl's Jr.	13,717	11.5%	181
Fast food/drive-in last 6 months: Checkers	3,442	2.9%	91
Fast food/drive-in last 6 months: Chick-fil-A	18,243	15.3%	119
Fast food/drive-in last 6 months: Chipotle Mex. Grill	10,584	8.9%	145
Fast food/drive-in last 6 months: Chuck E. Cheese’s	6,711	5.6%	126
Fast food/drive-in last 6 months: Church's Fr. Chicken	4,899	4.1%	96
Fast food/drive-in last 6 months: Dairy Queen	17,444	14.7%	93
Fast food/drive-in last 6 months: Del Taco	6,887	5.8%	169
Fast food/drive-in last 6 months: Domino's Pizza	18,082	15.2%	113
Fast food/drive-in last 6 months: Dunkin' Donuts	13,531	11.4%	99
Fast food/drive-in last 6 months: Fuddruckers	4,524	3.8%	134
Fast food/drive-in last 6 months: Hardee's	4,750	4.0%	60
Fast food/drive-in last 6 months: Jack in the Box	19,315	16.2%	154
Fast food/drive-in last 6 months: KFC	32,398	27.2%	99
Fast food/drive-in last 6 months: Little Caesars	9,917	8.3%	114
Fast food/drive-in last 6 months: Long John Silver's	5,588	4.7%	75
Fast food/drive-in last 6 months: McDonald's	68,190	57.3%	103
Fast food/drive-in last 6 months: Panera Bread	13,813	11.6%	119
Fast food/drive-in last 6 months: Papa John's	11,718	9.9%	113
Fast food/drive-in last 6 months: Pizza Hut	26,837	22.6%	103
Fast food/drive-in last 6 months: Popeyes	9,919	8.3%	114
Fast food/drive-in last 6 months: Quiznos	13,625	11.5%	126
Fast food/drive-in last 6 months: Sonic Drive-In	14,594	12.3%	104
Fast food/drive-in last 6 months: Starbucks	23,652	19.9%	132
Fast food/drive-in last 6 months: Steak n Shake	5,882	4.9%	98
Fast food/drive-in last 6 months: Subway	40,425	34.0%	107
Fast food/drive-in last 6 months: Taco Bell	43,257	36.4%	113
Fast food/drive-in last 6 months: Wendy's	36,424	30.6%	99
Fast food/drive-in last 6 months: Whataburger	6,732	5.7%	116
Fast food/drive-in last 6 months: White Castle	4,130	3.5%	87
Fast food/drive-in last 6 months: eat in	46,437	39.0%	104
Fast food/drive-in last 6 months: home delivery	14,796	12.4%	119
Fast food/drive-in last 6 months: take-out/drive-thru	63,898	53.7%	103
Fast food/drive-in last 6 months: take-out/walk-in	30,083	25.3%	103

Data Note: An MPI (Market Potential Index) measures the relative likelihood of the adults in the specified trade area to exhibit certain consumer behavior or purchasing patterns compared to the U.S. An MPI of 100 represents the U.S. average.
Source: These data are based upon national propensities to use various products and services, applied to local demographic composition. Usage data were collected by GfK MRI in a nationally representative survey of U.S. households. Esri forecasts for 2013 and 2018.

March 17, 2014

Restaurant Market Potential

West Dundee Retail Study Area
1, 5 and 10 mile radius
Ring: 10 mile radius

Prepared by Barry Bain
Latitude: 42.098118
Longitude: -88.28705

Demographic Summary	2013	2018
Population	529,479	542,868
Population 18+	385,547	395,027
Households	178,568	183,435
Median Household Income	$76,409	$86,254

Product/Consumer Behavior	Expected Number of Adults	Percent	MPI
Went to family restaurant/steak house in last 6 months	305,279	79.2%	110
Family restaurant/steak house last month: <2 times	102,640	26.6%	104
Family restaurant/steak house last month: 2-4 times	115,659	30.0%	111
Family restaurant/steak house last month: 5+ times	86,989	22.6%	116
Family restaurant/steak house last 6 months: breakfast	58,413	15.2%	116
Family restaurant/steak house last 6 months: lunch	107,702	27.9%	113
Family restaurant/steak house last 6 months: snack	12,495	3.2%	115
Family restaurant/steak house last 6 months: dinner	233,598	60.6%	115
Family restaurant/steak house last 6 months: weekday	168,979	43.8%	114
Family restaurant/steak house last 6 months: weekend	196,356	50.9%	115
Family restaurant/steak house last 6 months: Applebee's	108,494	28.1%	112
Family restaurant/steak house last 6 months: Bennigan's	11,251	2.9%	131
Family restaurant/steak house last 6 months: Bob Evans Farm	15,114	3.9%	87
Family restaurant/steak house last 6 months: Cheesecake Factory	37,040	9.6%	144
Family restaurant/steak house last 6 months: Chili's Grill & Bar	63,074	16.4%	140
Family restaurant/steak house last 6 months: Cracker Barrel	42,711	11.1%	101
Family restaurant/steak house last 6 months: Denny's	41,198	10.7%	118
Family restaurant/steak house last 6 months: Friendly's	13,303	3.5%	88
Family restaurant/steak house last 6 months: Golden Corral	23,805	6.2%	86
Family restaurant/steak house last 6 months: Intl Hse of Pancakes	56,481	14.6%	125
Family restaurant/steak house last 6 months: Lone Star Steakhouse	10,737	2.8%	104
Family restaurant/steak house last 6 months: Old Country Buffet	9,180	2.4%	85
Family restaurant/steak house last 6 months: Olive Garden	85,677	22.2%	125
Family restaurant/steak house last 6 months: Outback Steakhouse	54,918	14.2%	125
Family restaurant/steak house last 6 months: Perkins	11,295	2.9%	81
Family restaurant/steak house last 6 months: Red Lobster	58,168	15.1%	112
Family restaurant/steak house last 6 months: Red Robin	33,845	8.8%	156
Family restaurant/steak house last 6 months: Ruby Tuesday	38,150	9.9%	119
Family restaurant/steak house last 6 months: Ryan's	8,472	2.2%	59
Family restaurant/steak house last 6 months: Sizzler	12,757	3.3%	108
Family restaurant/steak house last 6 months: T.G.I. Friday's	51,791	13.4%	130
Went to fast food/drive-in restaurant in last 6 months	351,545	91.2%	103
Went to fast food/drive-in restaurant <6 times/month	129,915	33.7%	96
Went to fast food/drive-in restaurant 6-13 times/month	118,738	30.8%	107
Went to fast food/drive-in restaurant 14+ times/month	102,891	26.7%	107
Fast food/drive-in last 6 months: breakfast	113,036	29.3%	107
Fast food/drive-in last 6 months: lunch	244,221	63.3%	108
Fast food/drive-in last 6 months: snack	73,447	19.1%	109
Fast food/drive-in last 6 months: dinner	197,461	51.2%	106

Data Note: An MPI (Market Potential Index) measures the relative likelihood of the adults in the specified trade area to exhibit certain consumer behavior or purchasing patterns compared to the U.S. An MPI of 100 represents the U.S. average.
Source: These data are based upon national propensities to use various products and services, applied to local demographic composition. Usage data were collected by GfK MRI in a nationally representative survey of U.S. households. Esri forecasts for 2013 and 2018.

March 17, 2014

Restaurant Market Potential

West Dundee Retail Study Area
1, 5 and 10 mile radius
Ring: 10 mile radius

Prepared by Barry Bain
Latitude: 42.098118
Longitude: -88.28705

Product/Consumer Behavior	Expected Number of Adults	Percent	MPI
Fast food/drive-in last 6 months: weekday	268,947	69.8%	105
Fast food/drive-in last 6 months: weekend	200,538	52.0%	108
Fast food/drive-in last 6 months: A & W	18,444	4.8%	106
Fast food/drive-in last 6 months: Arby's	80,885	21.0%	103
Fast food/drive-in last 6 months: Boston Market	24,975	6.5%	135
Fast food/drive-in last 6 months: Burger King	137,141	35.6%	99
Fast food/drive-in last 6 months: Captain D's	13,496	3.5%	69
Fast food/drive-in last 6 months: Carl's Jr.	35,470	9.2%	145
Fast food/drive-in last 6 months: Checkers	11,456	3.0%	93
Fast food/drive-in last 6 months: Chick-fil-A	68,335	17.7%	137
Fast food/drive-in last 6 months: Chipotle Mex. Grill	38,016	9.9%	160
Fast food/drive-in last 6 months: Chuck E. Cheese’s	20,769	5.4%	120
Fast food/drive-in last 6 months: Church's Fr. Chicken	14,008	3.6%	85
Fast food/drive-in last 6 months: Dairy Queen	60,383	15.7%	99
Fast food/drive-in last 6 months: Del Taco	19,454	5.0%	148
Fast food/drive-in last 6 months: Domino's Pizza	55,892	14.5%	108
Fast food/drive-in last 6 months: Dunkin' Donuts	47,420	12.3%	107
Fast food/drive-in last 6 months: Fuddruckers	16,647	4.3%	153
Fast food/drive-in last 6 months: Hardee's	16,024	4.2%	62
Fast food/drive-in last 6 months: Jack in the Box	53,512	13.9%	132
Fast food/drive-in last 6 months: KFC	102,835	26.7%	97
Fast food/drive-in last 6 months: Little Caesars	30,050	7.8%	107
Fast food/drive-in last 6 months: Long John Silver's	18,387	4.8%	76
Fast food/drive-in last 6 months: McDonald's	223,315	57.9%	104
Fast food/drive-in last 6 months: Panera Bread	52,952	13.7%	141
Fast food/drive-in last 6 months: Papa John's	40,568	10.5%	121
Fast food/drive-in last 6 months: Pizza Hut	84,952	22.0%	100
Fast food/drive-in last 6 months: Popeyes	30,230	7.8%	107
Fast food/drive-in last 6 months: Quiznos	47,770	12.4%	136
Fast food/drive-in last 6 months: Sonic Drive-In	48,844	12.7%	108
Fast food/drive-in last 6 months: Starbucks	83,595	21.7%	144
Fast food/drive-in last 6 months: Steak n Shake	21,473	5.6%	111
Fast food/drive-in last 6 months: Subway	134,925	35.0%	111
Fast food/drive-in last 6 months: Taco Bell	139,345	36.1%	113
Fast food/drive-in last 6 months: Wendy's	125,042	32.4%	105
Fast food/drive-in last 6 months: Whataburger	22,113	5.7%	118
Fast food/drive-in last 6 months: White Castle	13,400	3.5%	87
Fast food/drive-in last 6 months: eat in	152,899	39.7%	105
Fast food/drive-in last 6 months: home delivery	46,799	12.1%	116
Fast food/drive-in last 6 months: take-out/drive-thru	216,824	56.2%	108
Fast food/drive-in last 6 months: take-out/walk-in	100,337	26.0%	106

Data Note: An MPI (Market Potential Index) measures the relative likelihood of the adults in the specified trade area to exhibit certain consumer behavior or purchasing patterns compared to the U.S. An MPI of 100 represents the U.S. average.
Source: These data are based upon national propensities to use various products and services, applied to local demographic composition. Usage data were collected by GfK MRI in a nationally representative survey of U.S. households. Esri forecasts for 2013 and 2018.

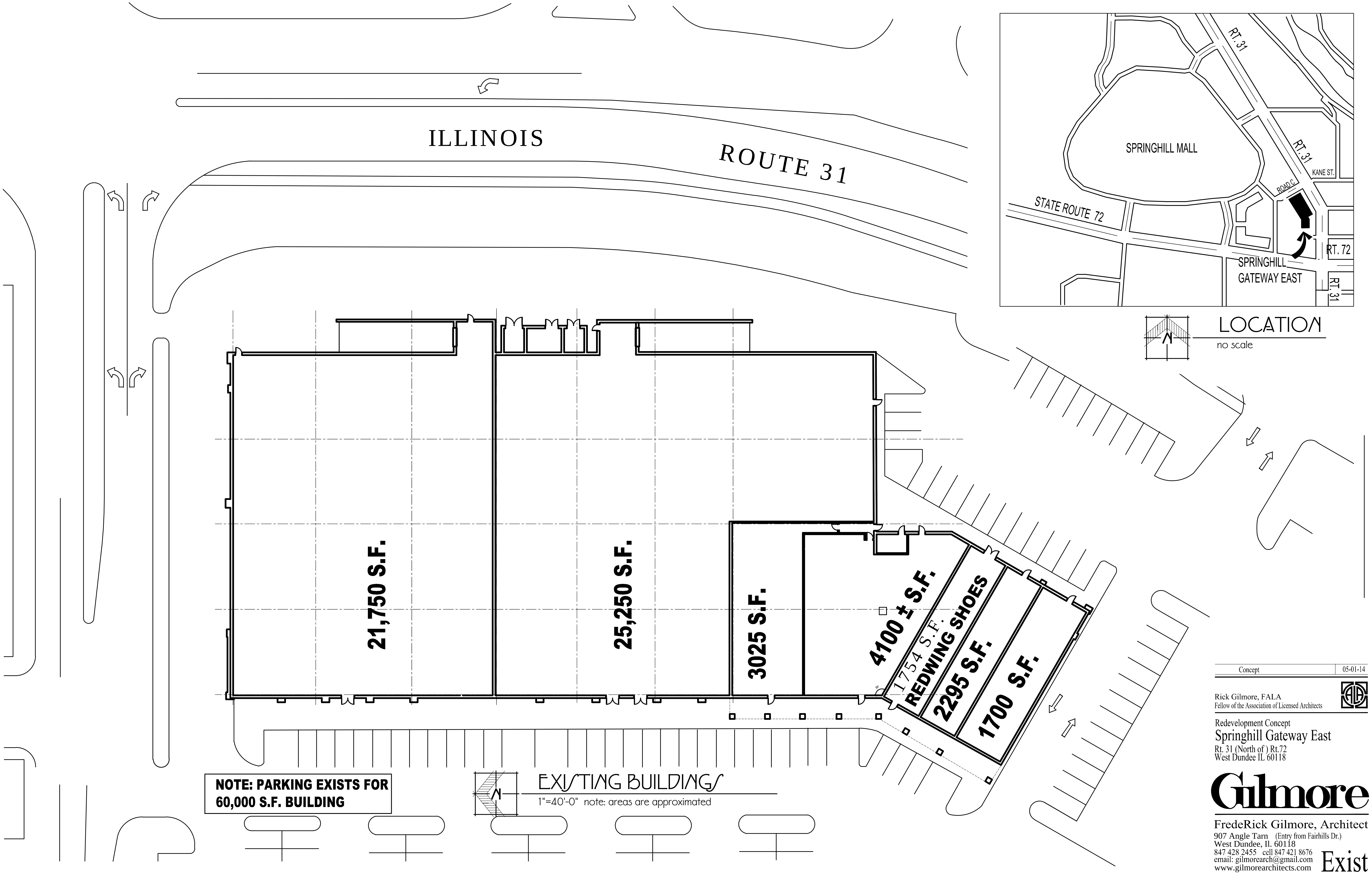
March 17, 2014

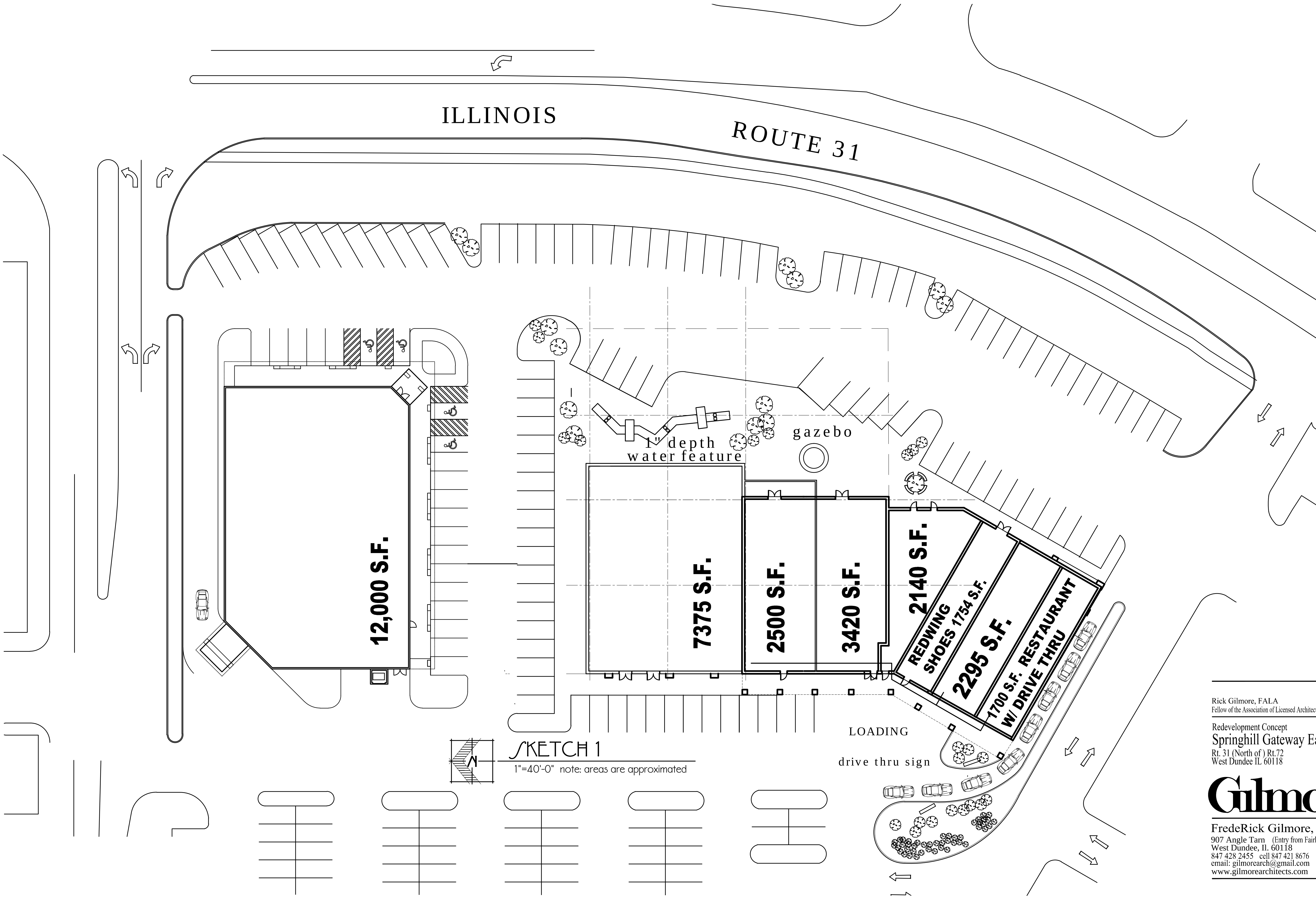
GROCERS:
Butera/Joseph Foods (25)
Angelo Caputo's Fresh Markets
Joe Caputo & Sons Fruit Market IGA
EuroFresh
Fresh Farms Market
Food 4 Less
Fresh Markets
Fresh Thyme Farmers Market
Garden Fresh (5)
Gordan Food Service
Heinen's
HyVee
Mariano's
Market Day
Meijer, Inc.
Nieman Foods
Pete's Fresh Markets (9)
Produce World
Shop & Save Market (6)
Spouts (160)
Trader Joe's
Centrella - Central Grocers
Valli Produce (4)
Village Market Place
Walt's Food Center
Whole Foods

GENERAL RETAILERS:
Abt Electronics
Academy Sports
Ace Hardware
American Mattress
American Sale
Anna's Linens
Art Van Furniture
ATI Physical Therapy
Back to Bed
Bealls, Inc.
Beauty Brands
Bedding Experts/Back to Bed
Binny's Beverage Depot
Blain's Farm & Fleet
Boot Barn
Bridgestone Retail Operations
CVS Pharmacy
David's Bridal
Destination XL / "DXL"

Discount Tire
Dunham's Sports
Fallas Disc Store
Family Christian
Floor & Décor
FTI Therapy
Garden Ridge Home Décor
Glick's Art & Crafts
Goodwill Industries
Grand Appliances
Grant's Appliances
Guitar Center
H & M
Harbour Freight
Haverty Furniture Cos., Inc.
HH Gregg
Hibbet Sports
Hobby Lobby
Honey Baked Ham
La-Z-Boy
Leslie's Pool Supplies
Loehman Brothers
Kerasotes Theaters
Marshall/TJX Companies
Mattress Firm
Micro-Electronics
Name Brands, Inc.
Old Time Pottery
Party City
Pep Boys
Petco - West Dundee
Pier One Imports
Rainbow Apparel Cos.
Round 1 Bowling
Rural King
Savers/Value Village
Sear's Outlet
Sleepy's
Slumberland, Inc.
Staples
Stein Mart
Studio Movie Grill
Suburban Tire
The Dump
ULTA Beauty
Vitamin Shoppe
Walmart/SAM’s

RESTAURANTS:
Arby's
Blaze Pizza
Buona Beef
Champs Sports Grill
Cheddar's
Chick-Fil-A
Chuck-E-Cheese
DQ Grill & Chill
El Famous Burrito
Golden Corral
Kona Grill
LJS/A&W
Meatheads
Miller Ale House
Muscle Maker Grill
Noodles and Company
Pepe's Mexican Restaurant
Pizzeria Locale
Red Robin
Sweet Tomatoes
The Cheesecake Factory


ILLINOIS
ROUTE 31
SPRINGHILL MALL
RT. 31
RT. 31
KANE ST.
ROAD C
STATE ROUTE 72
RT. 72
SPRINGHILL GATEWAY EAST
RT. 31
LOCATION
no scale
21,750 S.F.
25,250 S.F.
3025 S.F.
4100 ± S.F.
1754 S.F.
REDWING SHOES
2295 S.F.
1700 S.F.
NOTE: PARKING EXISTS FOR 60,000 S.F. BUILDING
EXISTING BUILDINGS
1"=40'-0" note: areas are approximated
Concept
05-01-14
Rick Gilmore, FALA
Fellow of the Association of Licensed Architects
Redevelopment Concept
Springhill Gateway East
Rt. 31 (North of) Rt.72
West Dundee IL 60118
Gilmore
FredeRick Gilmore, Architect
907 Angle Tarn (Entry from Fairhills Dr.)
West Dundee, Il. 60118
847 428 2455 cell 847 421 8676
email: gilmorearch@gmail.com
www.gilmorearchitects.com
Exist



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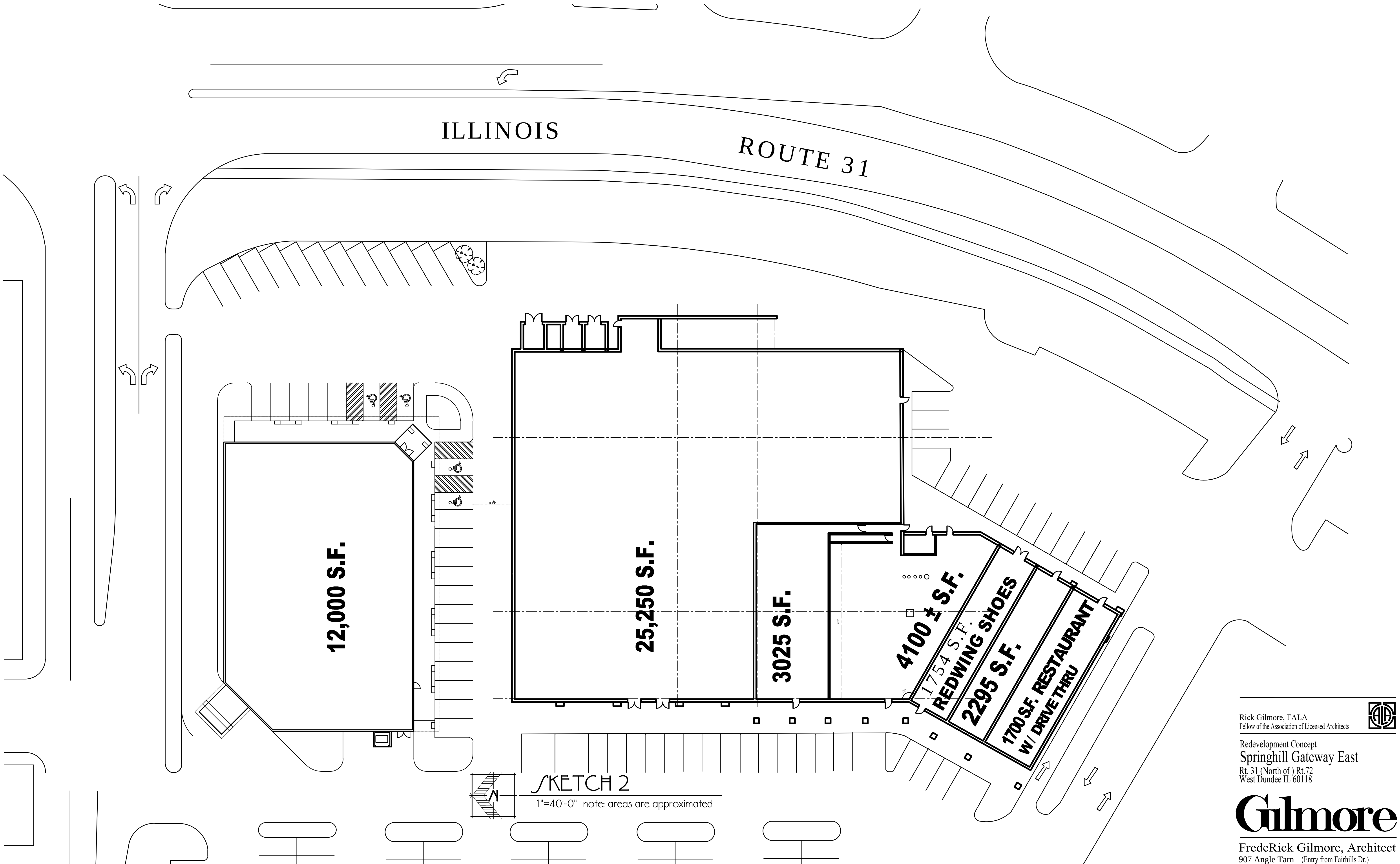
Sk1



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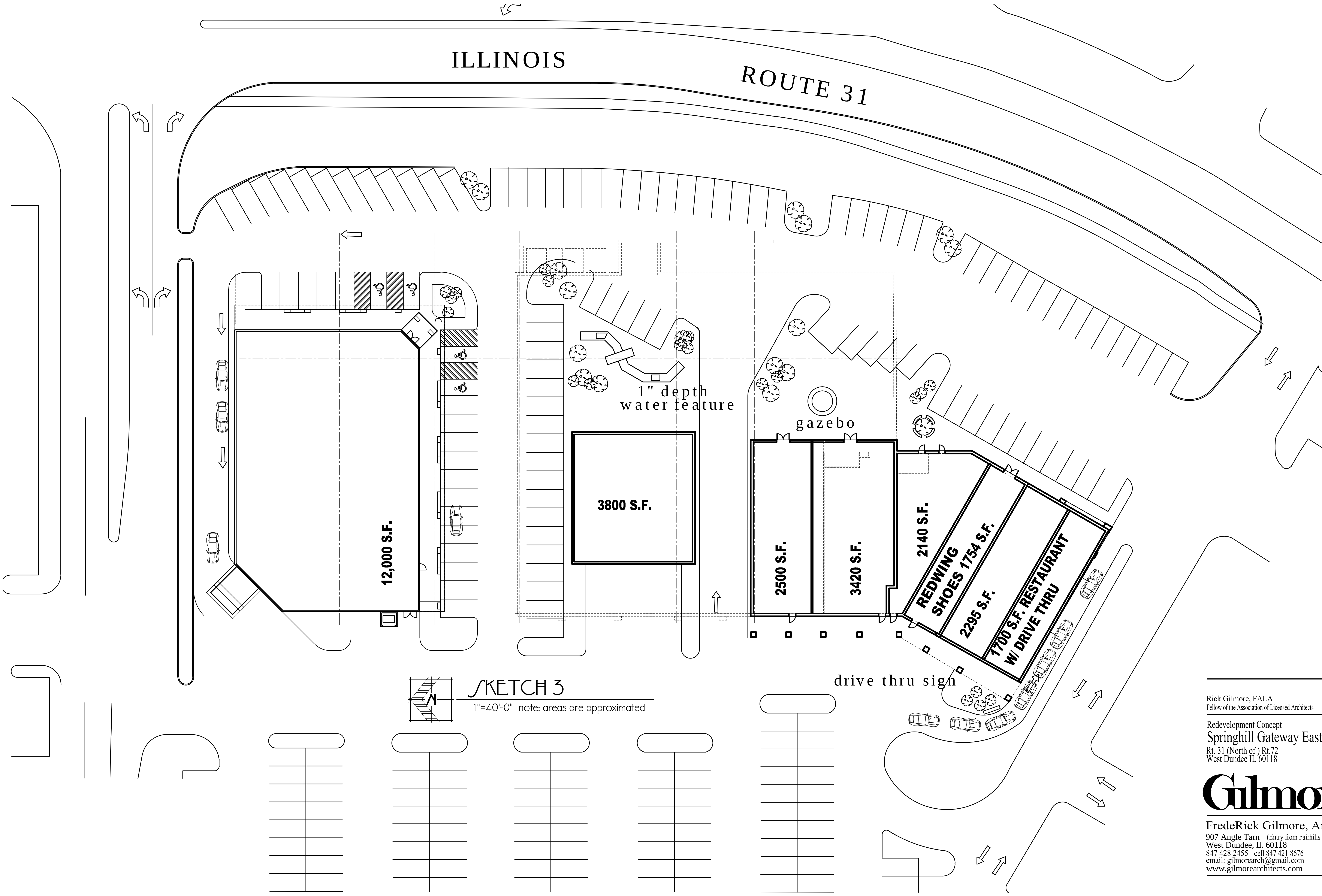
Sk2



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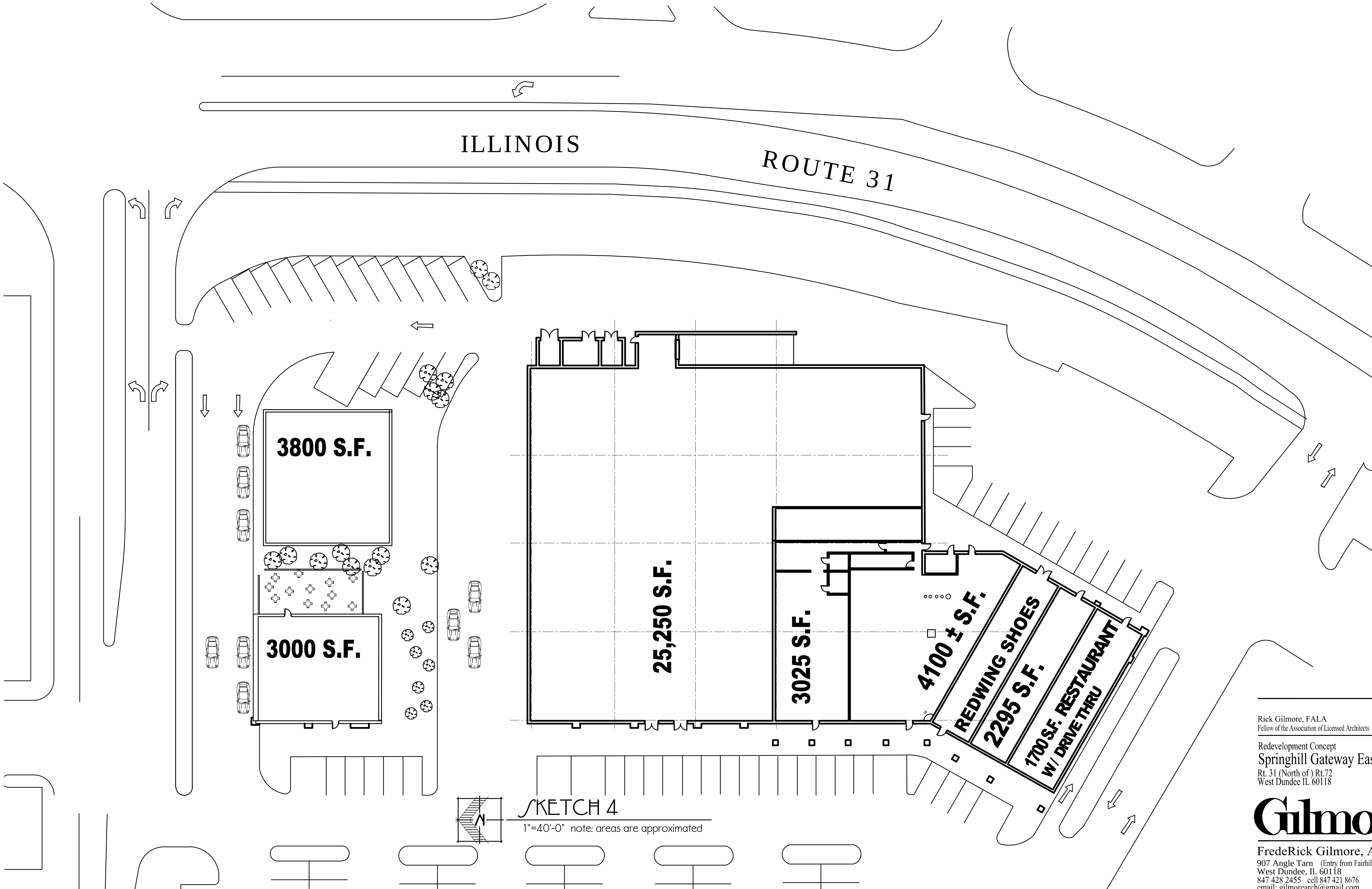
Sk3



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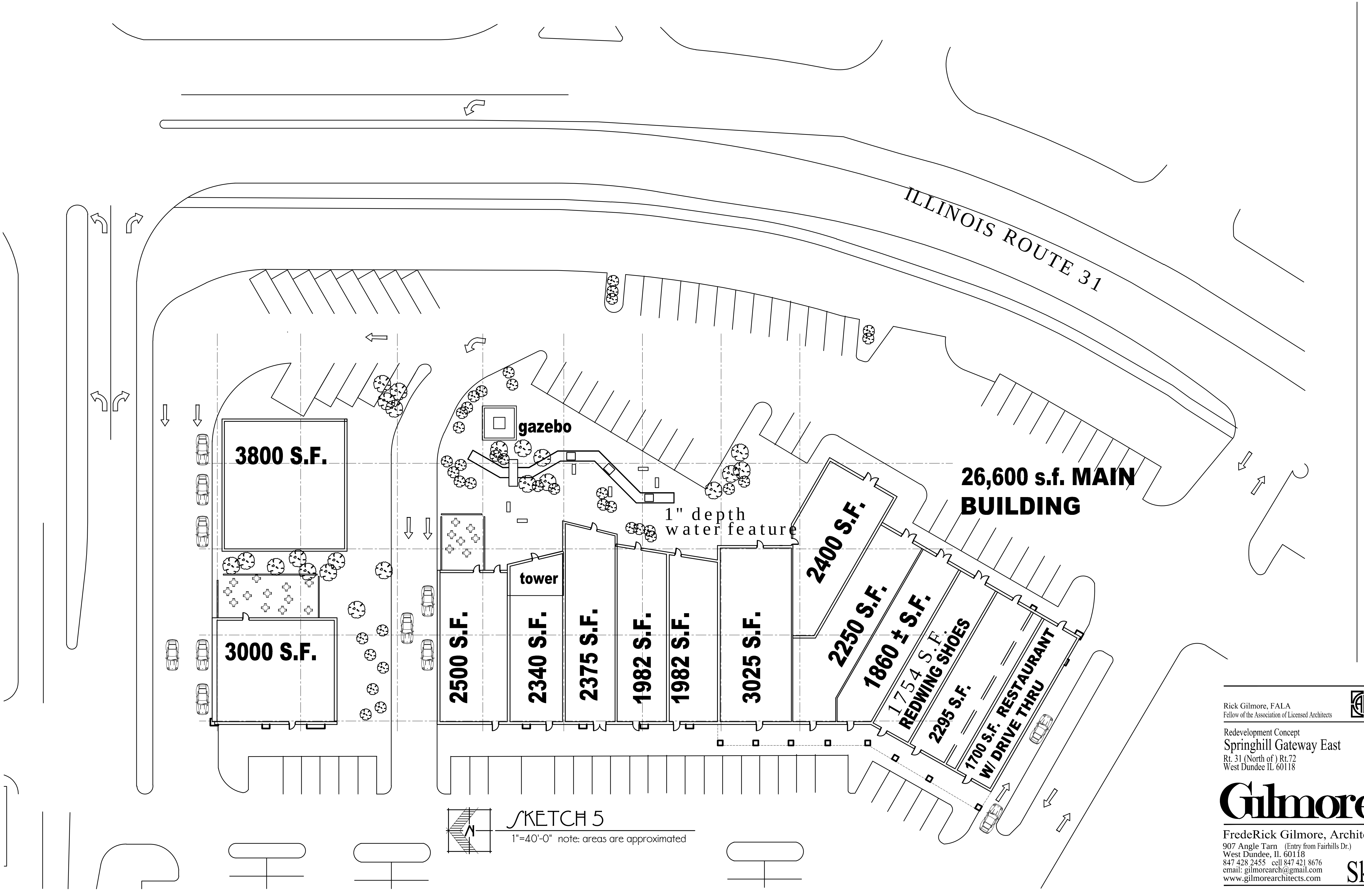
Sk4



SKETCH 5

1"=40'-0" note: areas are approximated

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Sk5

Development and retail space
Northwest Suburban
West Dundee, IL

West Dundee, IL
TRADE AREA PROFILE

DEMOGRAPHICS

RADIUS	POPULATION	HOUSEHOLDS	AVERAGE HOUSEHOLD INCOME	DAYTIME POPULATION
1 MILE	6,715	2,788	88,346	6,321
5 MILE	166,010	53,948	82,740	58,498
1 0 MILE	529,479	178,568	94,977	171,657

West Dundee has existing retail spaces and developable land at the center of Spring Hill Market Area at Route 31 and Route 72, along Route 31 within close proximity to I-90 interchange and along the Randall Road Corridor.

For More Information Contact
West Dundee Community Development Dept.
847-551-3805/ comdev@wdundee.org

Village of West Dundee

GRS GROUP CENTAUR FINANCIAL ADVISORS

September 4, 2014

Ms. or Mr.
GENERAL RETAIL

Re: Expansion Opportunity in West Dundee, IL

Dear Ms. or Mr. :

Pursuant to a strategic initiative the Village of West Dundee, IL is taking to enhance the commercial/retail services of the community, the Village of West Dundee has engaged GRS Centaur, a real estate/financial advisory firm to assist in the leasing and redevelopment of the retail and commercial property throughout the community. We are targeting quality retail users complimentary to the existing retailer base in and around principally Spring Hill Mall and the Randall Road corridor.

West Dundee has a strong interest in attracting quality retail and commercial uses to the community. There are several purchase and/or lease opportunities available in existing retail areas near Spring Hill Mall and the convergence of routes 31 and 72. Additionally, there are commercial sites available on Route 72 and the Randall Road corridor.

The attached flyer provides an aerial depiction of the opportunities around Spring Hill Mall which is the synergy of the commercial/retail development in West Dundee. On the back page of the flyer lists the available retail space for immediate occupancy or redevelopment and development parcels are shown with contact information. The Village is willing to assist in the establishment of your business through various programs - site improvements/interior build-out assistance, qualified reimbursement funds for redevelopment, and sales tax rebates.

We're certain your business would meet a need and have a loyal customer following in the West Dundee trade area. We would welcome the opportunity to discuss this further with you. Please feel free to contact us to discuss options for your next location in West Dundee.

Thank you for your consideration in advance.

Cathleen Tymoszenko

Cathleen Tymoszenko, Community Development Director
Village of West Dundee
847-551-3805
ctymoszenko@wdundee.org

Barry D. Bain

Barry D. Bain, CCIM
GRS Group | Centaur – Director
630-690-4335
bbain@grs-global.com

NORTHWEST SUBURBAN CHICAGO

West Dundee

Illinois

West Dundee is one of northwest Chicago's fastest growing suburbs. A vibrant community that is home to Spring Hill Mall, the largest enclosed mall *(1.1+mm sf)* within a 30-40 minute drive, easily accessible from I-90, RT31&72 *(41,000 vehicles per day)* and Randall Road *(45,000 vehicles per day)*.

Developer friendly incentives and public assistance programs include TIF and SSA financing, sales tax and development cost rebates, and grants and loans.

CONTACT

West Dundee Community Development Department
847-551-3805
comdev@wdundee.org

DEMOGRAPHICS

RADIUS *miles*	POPULATION *permanent*	POPULATION *daytime*	HOUSEHOLDS	HOUSEHOLD INCOME *average*
1	6,715	6,321	2,788	$88,346
5	166,010	58,498	53,948	$82,740
10	529,479	171,657	178,568	$94,977

Village of West Dundee

RETAIL AND RESTAURANT SPACE

#	Location	Address	Type of Space	Size (sf)	Zoning	Lease/Sale	Price	Contact	Company	Phone
1	Huntley and Tartans (Tartans Crossing)	1925-1991 Huntley	Retail Strip	1,200 - 5,400	B2	Lease	$12-$14 psf	Heather Schweitzer	Premier Commercial	847-854-2300
2	Rt 31 and Rt 72 (Spring Hill Mall)	N/A	Mall	Misc	B2	Lease	Undisclosed	Amy Prew	Rouse Properties	847-428-1509
3	Rt 31 and Rt 72 (Gateway East)	310-390 N. 8th St.	Existing Retail	1,500 - 59,000	B2	Lease/Sale	$12 psf / negotiable	Stuart Lenhoff	Horizon	847-870-8585
4	Rt 31 and Rt 72 (Gateway West)	830-890 Main	Existing Retail	1,500 - 50,000	B2	Lease	Negotiable	Kurt Kresnery	Americo Real Estate	847-343-8149
5	Rt 72 and Village Quarter Rd (former Best Buy)	979 Main St	Existing Retail	36,000	B2	Lease	$9 psf	Adam Cody	SRS	847-334-2547
6	Rt 72 and Locust (former Target)	999 Main St.	Existing Retail	126,000+10	B2	Purchase	$3,200,000	Wendell Hollan	CBRE	630-573-7018
7	Rt 72 and 2nd St	121 Main St.	Existing Retail	10,000	B1	Sale	$545,000	Dave Schmidt	Premier Commercial	847-404-3851
8	Rt 72 and 1st St	99 Main St.	Existing Retail	1,000	B1	Sale	$125,000	Greg Samata		847-428-0001
9	Rt 72 and 1st St	89-93 Main St.	Existing Office	5,000	B1	Sale	$295,000	Greg Samata		847-428-0001
10	Rt 72 and 1st St	101 S. 1st St.	Existing Office	10,000	B1	Sale	$650,000	Greg Samata		847-428-0001
11	Rt 31 and Eichler	531-547 S. 8th St.	Retail Strip	1,200	B3	Lease	$1996 per mo.	Affiliated Realty	Mariann Eder	847-439-0400
12	Rt 31 and Strom Drive	621-625 S. 8th St.	Retail Strip	2,576	B3	Lease	$15 psf	Paul Tsakiris	1st Western Properties	773-545-2000
13	Rt 31 S of Willow	750-762 8th	Retail Strip	1,600	B3	Lease	Undisclosed	Alan Miller	Rose Plaza	847-744-6026
14	Rt 31 and Market Loop	631-785 S.8th St.	Retail Strip	Misc	B3	Lease	Undisclosed	Ladi Kolacny	Century Development	847-428-0700

DEVELOPMENT SITES

#	Location	Address	Type of Space	Size (sf)	Zoning	Lease/Sale	Price	Contact	Company	Phone
1	E Side Randal (Rt 72 to Binnie)	N/A	Vacant/Mixed Use	270 Acres	SDD	Sale	Undisclosed / Will Divide	Mike Anderson	Anderson & Associates	847-468-1090
2	SE Corner Randall and Rt 72	N/A	Vacant/Mixed Use	70 Acres	Unincorp	Sale	Undisclosed	Cathleen Tymoszenko	Village of West Dundee	847-551-3805
3	Randall and Carrington	N/A	Commercial/Divided	24 Acres	B2	Sale	Undisclosed	Robert Traszka	Owner	847-826-0938
4	NW Corner Randall and Rt 72	N/A	Vacant/Commercial	1.9 Acres	Unincorp	Sale	$1 million	Cathleen Tymoszenko	Village of West Dundee	847-551-3805
5	N of NW Corner Randall and Rt 72	N/A	Vacant/Commercial	6 Acres	Unincorp	Sale	$7 psf	Jim Kiss	Owner	847-428-5477
6	N of NW Corner Randall and Rt 72	N/A	Vacant/Mixed Use	47 Acres	Unincorp	Sale	Undisclosed / Will Divide	John Cassidy	Lee and Associates	773-355-3006
7	Rt 72 and Wesemann (Oakview Corp Park)	N/A	Vacant/Improved	3-16 Acres	SDD	Sale	Undisclosed	Noel Liston	Darwin	630-782-9520
8	NE Rt 72 and Wesemann	N/A	Vacant Commercial	2.4 Acres	SDD	Sale	$1.1 million	Paul Montes	Inland Real Estate	630-990-8400
9	SW Corner Randall and Rt 72	N/A	Vacant/Mixed Use	38 Acres	Unincorp	Sale	Undisclosed	Cathleen Tymoszenko	Village of West Dundee	847-551-3805
10	Huntley W of Harbour	N/A	Vacant/Commercial	22 Acres	B2	Sale	Undisclosed	John Regan	Owner	847-697-6770
11	SW Corner Huntley and Elm	N/A	Vacant/Commercial	11 Acres	B2	Lease	Undisclosed	Amy Prew	Rouse Properties	847-428-1509
12	Rt 31 and Rt 72 (Spring Hill Mall Outlot)	N/A	Vacant/Commercial	15 Acres	B2	Lease	Undisclosed	Amy Prew	Rouse Properties	847-428-1509
13	NE Corner Rt 72 and Locust	1250 W. Main	Vacant/Commercial	2.9 Acres	B2	Sale	Undisclosed / Divisible	Mike Streit	Arcore	630-908-5702
14	Rt 31 and Village Quarter Rd	N/A	Vacant/Commercial	7 Acres	B3	Sale	$1,500,000	Tony Gange	CBRE	630-573-7030
15	SW Corner Rt 31 and Willow	N/A	Vacant/Commercial	1.82 Acres	B3	Sale	$10 psf	Anne Imming	Jones Lang LaSalle	630-423-3433
16	Beacon Street	N/A	Vacant/Commercial	1.5 Acres	B3	Sale	Undisclosed	Ladi Kolacny	Century Development	847-428-0700
17	Rt 31 S of Willow	N/A	Vacant/Commercial	1.53 Acres	B3	Sale	Undisclosed	Ladi Kolacny	Century Development	847-428-0700
20	NW Corner Rt 31 and Boncosky	N/A	Vacant/Mixed Use	36 Acres	B3	Sale	Undisclosed	Craig Zachrich	HLC Partners	847-334-2547
21	Rt 31 from Marriott to N of Angle Tarn	N/A	Vacant/Mixed Use	500 Acres	SD	Sale	Undisclosed	Craig Zachrich	HLC Partners	847-334-2547
22	Rt 31 from Marriott to N Angle Tarn	N/A	Vacant/Mixed Use	170 Acres	SD	Sale	Undisclosed	Craig Zachrich	HLC Partners	847-334-2547
23	SW Corner Route 31 and Marriott Drive	2070 Rt. 31	Vacant/Commercial	40,000	B3	Sale	$895,000	Jonathan Hyman	Metro CRE	224-627-3812

CONTACT: West Dundee Community Development Department 847-551-3805 comdev@wdundee.org

Village of West Dundee

Business
GROCERY STORES
Butera/Joseph Foods
Angelo Caputo's Fresh Markets
Joe Caputo & Sons Fruit Market IGA
Cermak Fresh Market
EuroFresh
Fresh Farms Market
Food 4 Less
Fresh Markets
Fresh Thyme Farmers Market
Garden Fresh
Gordan Food Service
Heinen's
HyVee
Mariano's
Meijer, Inc.
Nieman Foods
Pete's Fresh Markets
Produce World
Save-A-Lot Foods
Shop & Save Market
Sprouts
Standard Market
Trader Joe's
Centrella - Central Grocers
Valli Produce
Village Market Place
Walt's Food Center
Whole Foods
GENERAL RETAIL
Abt Electronics
Academy Sports
Ace Hardware
American Mattress
American Sale
Art Van Furniture
ATI Physical Therapy
Peebles, Inc. (Stage Stores)
Beauty Brands
Bedding Experts/Back to Bed
Binny's Beverage Depot
Blain's Farm & Fleet
Blicks Art & Crafts
Boot Barn
Bridgestone Retail Operations
CVS Pharmacy
David's Bridal
Destination XL / "DXL"
Discount Tire
Dunham's Sports
Fallas Disc Store
Family Christian
Floor & Décor
FTI Therapy
Garden Ridge Home Décor
Goodwill Industries
Grand Appliances
Grant's Appliances
Guitar Center
H & M
Haverty Furniture Cos., Inc.
HH Gregg
Hibbett Sports
Hobby Lobby
Honey Baked Ham
La-Z-Boy
Leslie's Pool Supplies
Kerasotes Theaters
Marshall/TJX Companies
Mattress Firm
Micro-Electronics
Name Brands, Inc.
Old Time Pottery
Party City
Pep Boys
Petco - West Dundee
Pier One Imports
Rainbow Apparel Cos.
Rural King
SAM's Club/Wal-Mart
Savers/Value Village
Sear's Outlet
Sleepy's
Slumberland, Inc.
Staples
Stein Mart
Studio Movie Grill
Suburban Tire
ULTA Beauty
Vitamin Shoppe

RESTAURANTS
Arby's (Lunan Corp.)
Buona Beef
Champs Sports Grill
Cheddar's
Chick-Fil-A
Chuck-E-Cheese
DQ Grill & Chill
El Famous Burrito
Golden Corral
Kona Grill
LJS/A&W
Miller Ale House
Pepe's Mexican Restaurant
Red Robin
The Cheesecake Factory