North Side Historic District

Retail Market Analysis

Bethlehem, Pennsylvania

Prepared For:

City of Bethlehem, Pennsylvania

Prepared By;

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INTRODUCTION

Figure 1: *The North Side Historic District of Bethlehem, which was recently designated as a National Historic Landmark District, has a significant pent-up demand for additional retailers and restaurants.*

Executive Summary

This study finds that Bethlehem's North Side Historic District can presently support up to 210,000 additional square feet (sf) of retail and restaurant development, generating as much as $77.3 million in new sales by 2024. This new commercial development could include 40 to 45 new retail stores totaling 140,000 sf and 20 to 30 new restaurants totaling 70,000 sf. The 210,000 sf of additional supportable retail and restaurant space represents a 120 percent increase in the North Side Historic District's existing 175,000 sf of first floor commercial area.

The North Side Historic District in Bethlehem is a walkable downtown area that was recently designated as a National Historic Landmark District. Its study area has an estimated 36 square mile primary trade area. The primary trade area includes 122,000 year-round residents and 43,000 households with an average income of $75,000 per year. Many trade area residents are gainfully employed, and the average age is 39.5 years. Nearly 30 percent of the trade area's residents have a four-year college degree and 35 percent earn over $75,000 per year.

Figure 2: *Bethlehem is in eastern Pennsylvania, roughly 50 miles north of Philadelphia and 70 miles west of New York City.*

Background

Gibbs Planning Group, Inc. (GPG) has been retained by the City of Bethlehem to conduct a retail feasibility analysis to determine how much additional retail and restaurant development (if any) is supportable in the city's North Side Historic District.

GPG addressed the following issues in this study:

- What is the existing and planned retail market in the North Side Historic District and surrounding areas?
- What are the existing and potential trade areas for the North Side Historic District?
- What are the population, demographic and lifestyle characteristics of the North Side Historic District area currently and projected for 2024?
- What is the current and projected growth for retail expenditures in the North Side Historic District area, now and in 2024?
- How much additional retail square footage is supportable in the North Side Historic District primary trade area and what retailers may seek to deploy a new business there by 2024?

- What retail sales volumes can potentially be achieved in the area by these new businesses?

Methodology

To address the above issues, GPG defined existing and potential trade areas that would likely serve the existing and new retail development in the North Side Historic District area based on geographic and topographic considerations, traffic access/flow in the area, relative retail strengths, concentrations of daytime employment and the retail gravitation in the market, as well as our experience defining trade areas for similar markets.

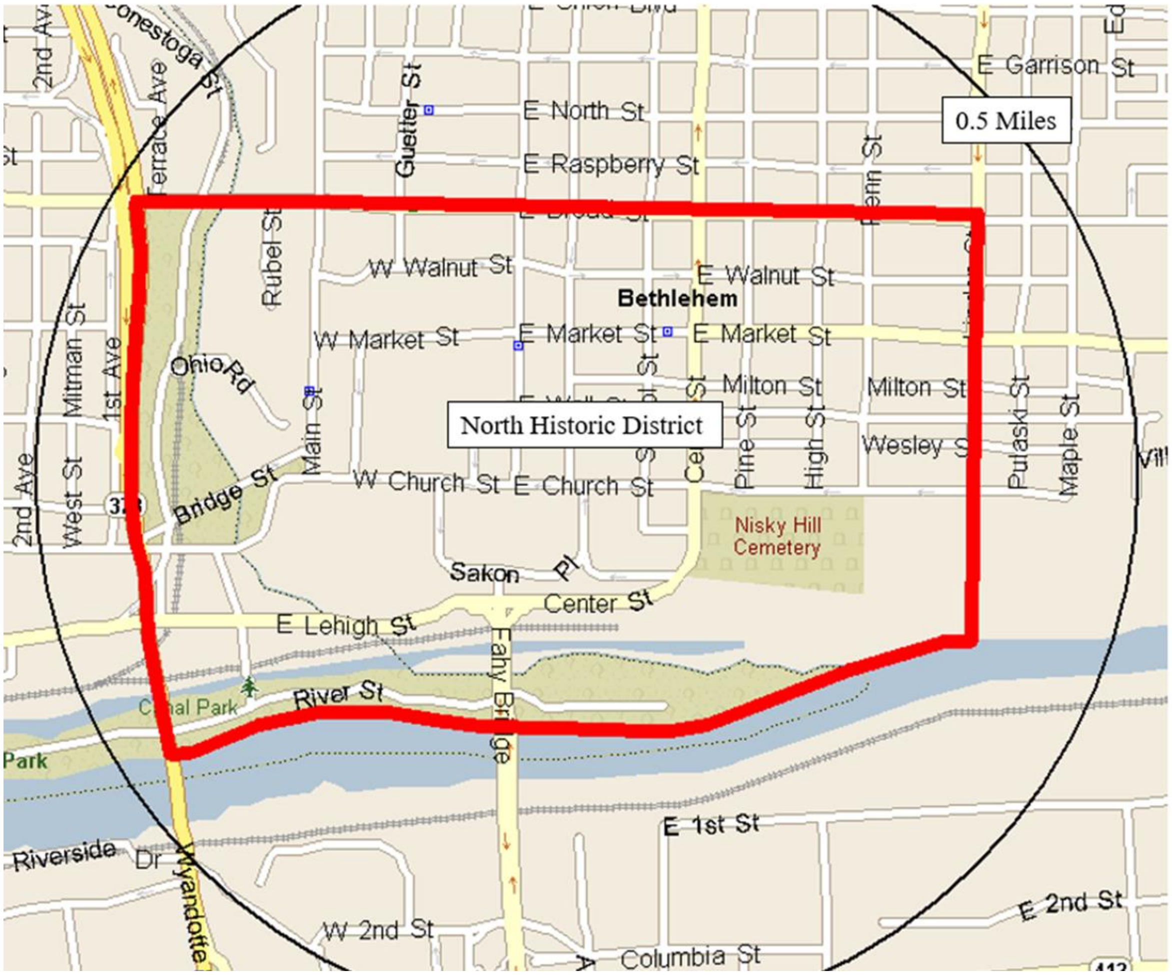


Figure 3: *The North Side Historic District study area boundaries are shown above, within the red lines (source: City of Bethlehem, Department of Planning & Zoning).*

Population, consumer expenditure and demographic characteristics of trade area residents were collected by census tracts from the U.S. Bureau of the Census, U.S. Bureau of Labor Statistics and Environmental Systems Research Institute (ESRI).

Finally, based on the projected consumer expenditure capture (demand) in the primary trade area of the gross consumer expenditure by retail category, less the current existing retail sales (supply) by retail category, GPG projects the potential net consumer expenditure (gap) available to support existing and new commercial development. The projected net consumer expenditure capture is based on household expenditure and demographic characteristics of the trade areas, existing and planned retail competition, traffic and retail gravitational patterns and GPG's qualitative assessment of Bethlehem.

Net potential captured consumer expenditure (gap) is equated to potential retail development square footage, with the help of retail sales per square foot data provided by Dollars and Cents of Shopping Centers (Urban Land Institute and International Council of Shopping Centers), qualitatively adjusted to fit the urbanism and demographics of the study area.

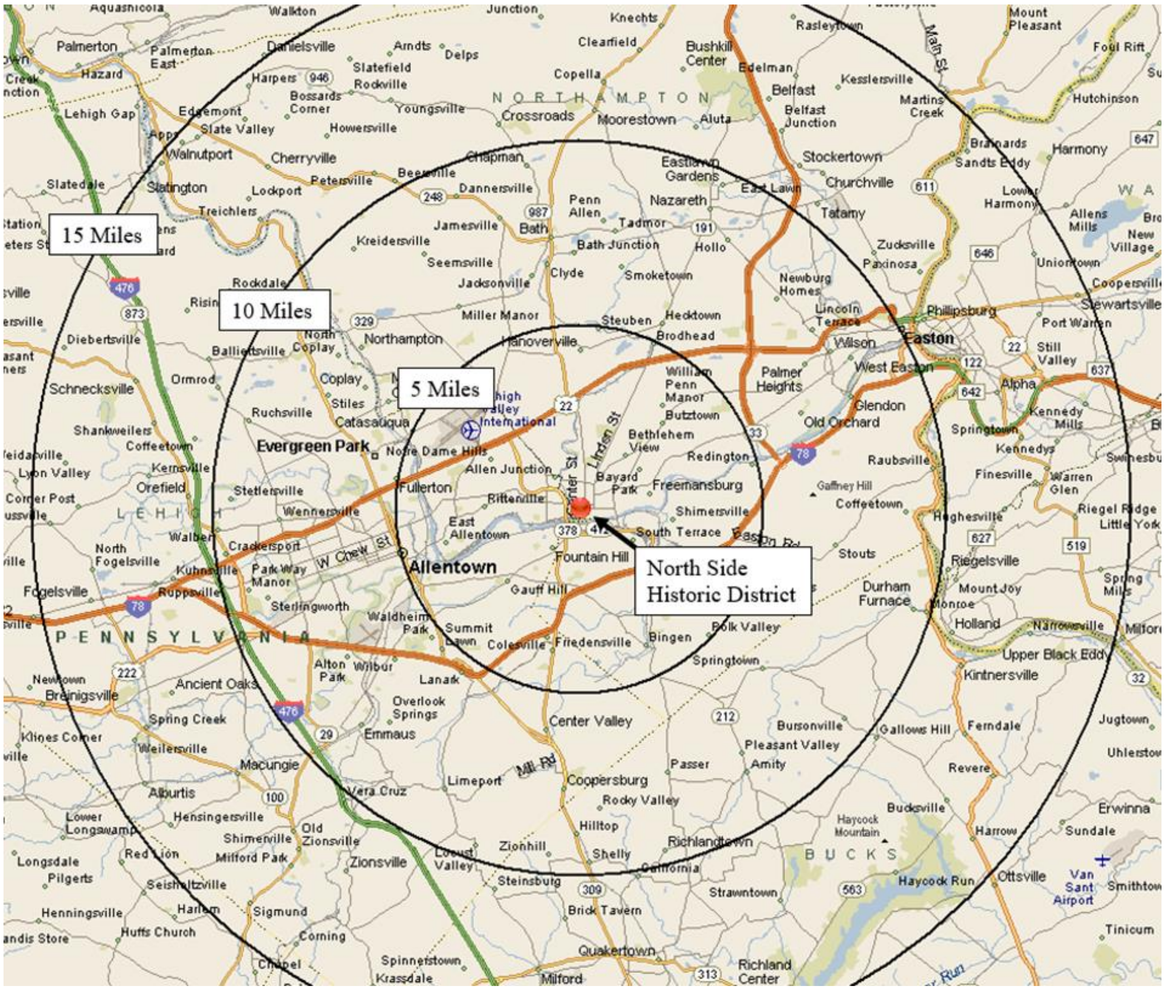


Figure 4: *Map showing the location of Bethlehem's North Side Historic District within the Lehigh Valley region.*

RETAIL TRADE AREAS

Based on GPG's analysis of the existing Bethlehem region's commercial centers, population clusters, employment, visitors, highway access and the retail gravitation in the market, this study estimates that the North Side Historic District study area has two trade areas, a primary and a secondary. Using data from ESRI (Environmental Systems Research Institute) and the U.S. Census Bureau, GPG obtained the most recent population and demographic characteristics (2019), and those projected for 2024 for the defined trade areas, the Allentown-Bethlehem-Easton MSA and the Commonwealth of Pennsylvania.

Primary Trade Area

Bethlehem's North Side Historic District primary trade area covers 36 square miles and includes 122,000 year-round residents. By 2024, the primary trade area's population is estimated to grow by 1,900 people, or 0.31 percent. This growth rate is lower than that for the secondary trade area and MSA, but higher than the growth rate for the Commonwealth of Pennsylvania. The number of households in the primary trade area will increase from 47,300 to 48,000 and will include an average of 2.44 people per household.

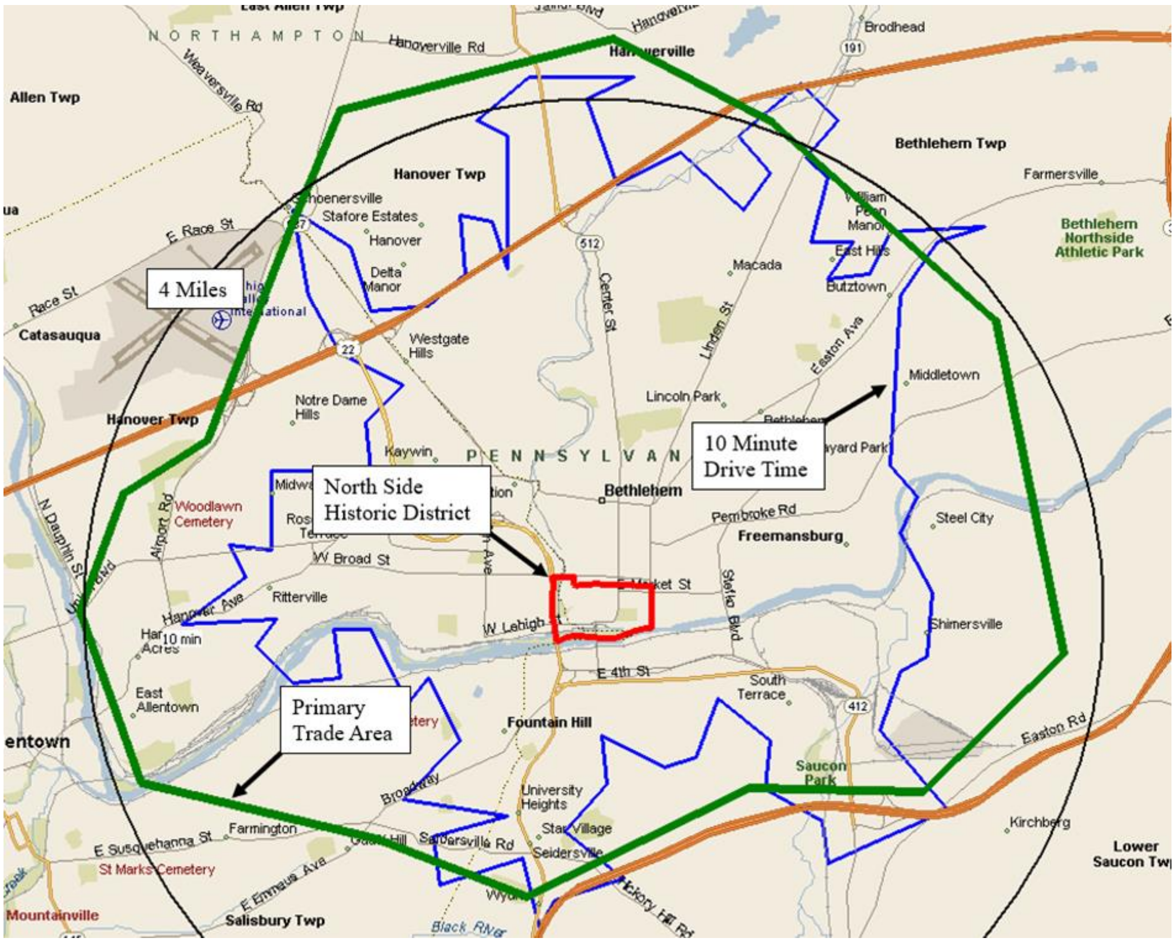


Figure 5: The North Side Historic District's estimated primary trade area is shown above, inside the green lines and includes 47,300 households.

The North Side Historic District primary trade area's median household income is currently $53,000 and is expected to increase to $59,000 by 2024. Its average household income is $75,000, with 35 percent of households earning over $75,000 per year – lower than that for the secondary trade area, MSA and the Commonwealth of Pennsylvania. Nearly 30 percent of the primary trade area's residents over the age of 25 have earned a bachelor's degree or higher, which is higher than that for the secondary trade area (28 percent), on par with the MSA and slightly lower than that for Pennsylvania generally (32 percent). Residents living in the primary trade area have a median age of 39.5, which is slightly younger than that of Pennsylvania at 41.5.

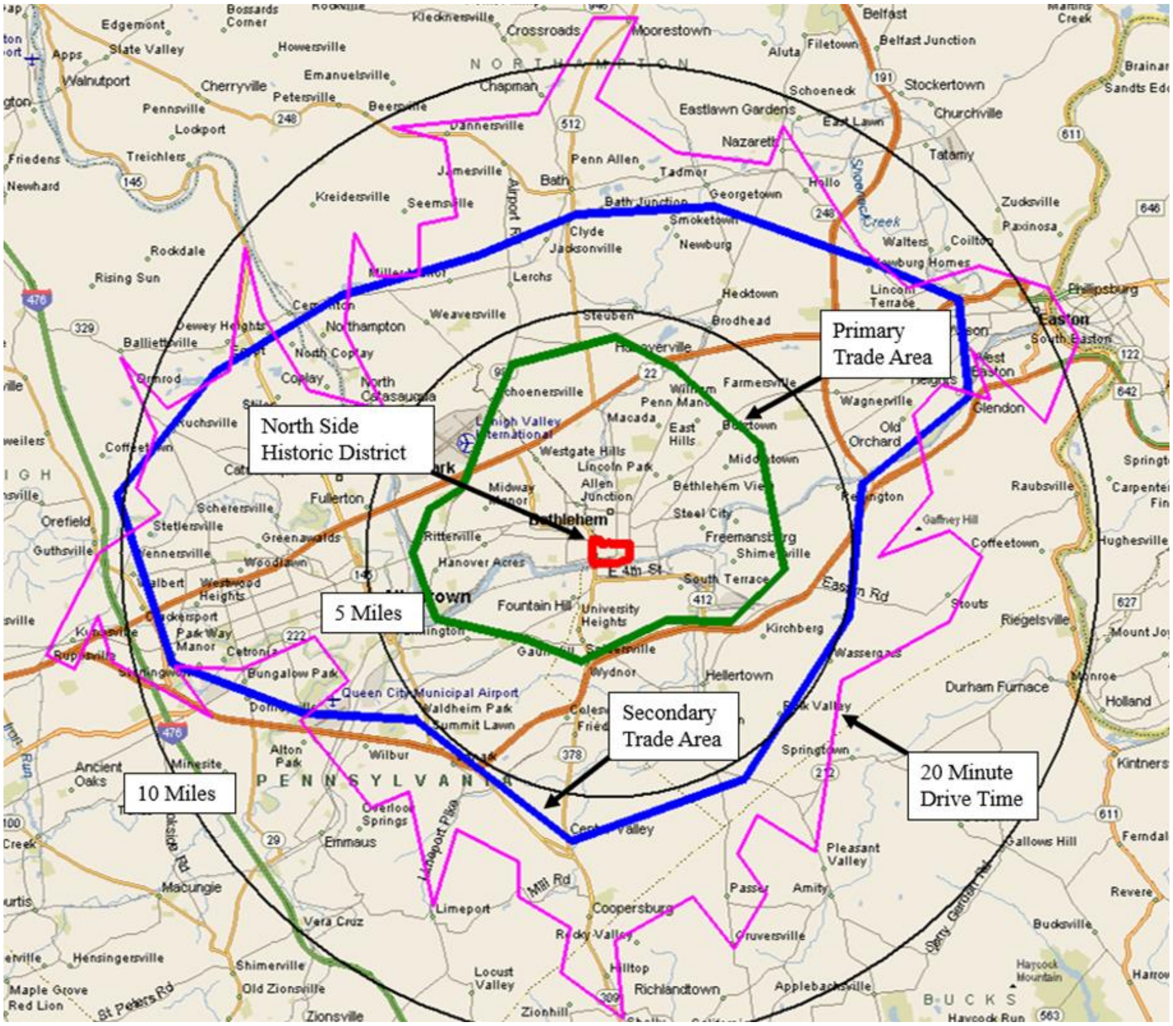


Figure 6: *The North Side Historic District's estimated secondary trade area shown above in blue and the primary trade area in green. The study area's estimated 20-minute drive time is shown inside the pink line.*

The median home value in the primary trade area is estimated to be $190,000. Of all the primary trade area's households, 54.5 percent are owner-occupied, a number that has decreased 2.4 percent since 2010 and is expected to decrease to 54.1 percent by 2024. Renter-occupied households have increased from 37.3 percent in 2010 to 39.5 percent in 2019 and are expected to increase to 39.7 percent by 2024. The primary trade area's current residential vacancy rate is 6 percent, a number that has slightly increased by 0.2 percent since 2010 and is projected to further increase to 6.3 percent by 2024. The percentage of housing units valued at over $200,000 is expected to increase from 45.3 percent to 50.8 percent – coinciding with an increase in the median home value to $203,000 by 2024.

The following borders approximately delineate the primary trade area (See Figure 5):

- North – Orchard Lane & Hanoverville Road
- South – Interstate 78
- East – Farmersville Road & Ringhoffer Road
- West – Lehigh River & Lehigh Valley International Airport

Secondary Trade Area

From the center of the study area, the North Side Historic District's estimated secondary trade area extends approximately 7 miles to the north, 6 miles to the south, 8 miles to the east and 10 miles to the west. The secondary trade area includes 370,000 year-round residents and 140,000 households. GPG estimates residents, workers and visitors in the locale between the primary and secondary trade area will only account for a minimal amount of retail and restaurant commerce due to other more convenient commercial centers. However, North Side Historic District businesses that offer unique, exceptional goods and services could potentially attract customers from the secondary trade area on a regular basis.

The secondary trade area demonstrates a higher household growth rate (0.4 percent annually) than that for the primary trade area, MSA and Pennsylvania generally. The number of households is 140,000, increasing to 143,000 by 2024. The population is expected to grow by 0.44 percent annually to reach 378,000 by 2024. This rate is also higher than the annual growth rates for the primary trade area, MSA and Commonwealth of Pennsylvania.

Figure 7: North Side Historic District's Demographic Comparisons

Demographic Characteristics	*Primary Trade Area*	*Secondary Trade Area*	*Allentown-Bethlehem-Easton PA-NJ MSA*	*Pennsylvania*
2019 Population	**122,000**	370,000	856,000	13,012,000
2024 Population	**124,000**	378,000	872,000	13,160,000
2019-24 Projected Annual Growth Rate	**0.31%**	0.44%	0.38%	0.23%
2019 Households	**47,000**	140,000	327,000	5,142,000
2024 Households	**48,000**	143,000	333,000	5,200,000
2019-2024 Projected Annual HH Growth Rate	**0.28%**	0.40%	0.34%	0.22%
Persons Per Household 2019	**2.44**	2.54	2.55	2.45
Median Age	**39.5**	39.6	42.2	41.5
2019 Median Household Income	**$53,000**	$55,000	$64,000	$59,000
2019 Average Household Income	**$75,000**	$78,000	$88,000	$84,000
2024 Median Household Income	**$59,000**	$62,000	$73,000	$67,000
2024 Average Household Income	**$85,000**	$89,000	$101,000	$95,000
% Households w. incomes $75,000+	**35.2%**	36.8%	43.7%	40.4%
% Bachelor's Degree or higher	**29.0%**	28.0%	30.4%	32.2%

Figure 7: *This side-by-side table compares and contrasts the primary trade area demographic statistics with those of the secondary trade area, MSA and Commonwealth of Pennsylvania.*

Median household income in the secondary trade area is $55,000 and the average household income is $78,000, both of which are lower than the MSA and Pennsylvania's figures. Median household incomes are expected to increase to $62,000 by 2024, while average household incomes will have grown by 14.1 percent to $89,000. Educational attainment of a bachelor's degree or higher is at 28 percent and 36.8 percent of households earn more than $75,000 annually, slightly less than the MSA and Pennsylvania's figures. The secondary trade area's median age is 39.6 years, which is younger than Pennsylvania's at 41.5.

LIFESTYLE TAPESTRY DEMOGRAPHICS

As a part of this analysis, GPG purchased third-party demographic research prepared by ESRI. The ESRI data includes tapestry lifestyles, which creates 65 classifications, or lifestyle segments, that help determine purchasing patterns. These segments are broken down to the U.S. Census Block Group level and used by many national retailers to help determine future potential locations. The most prevalent ESRI lifestyle groups in Bethlehem's North Side Historic District are Parks and Rec, Front Porches, Fresh Ambitions, Exurbanites and Midlife Constants.

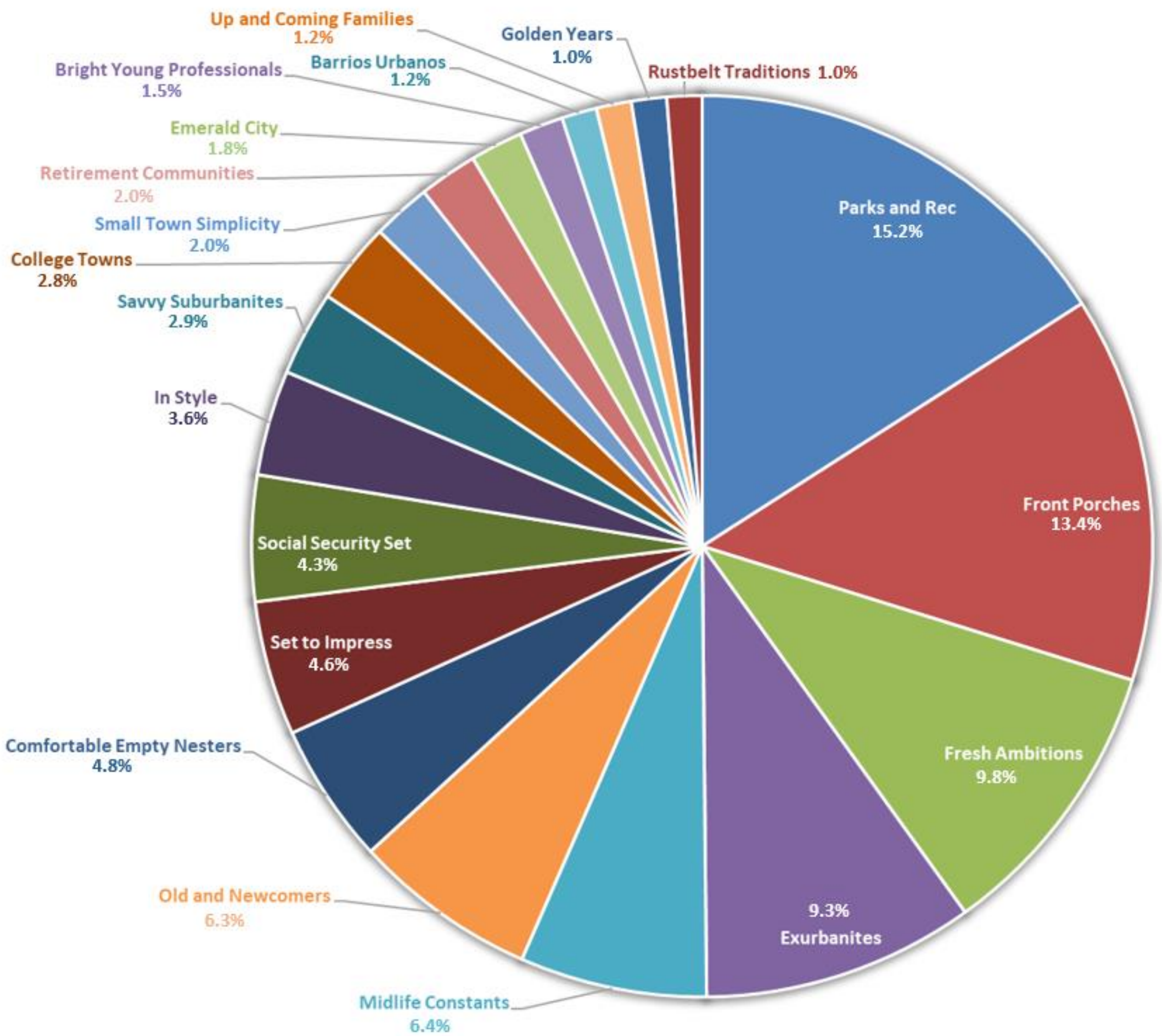


Figure 8*: The relative proportions of the Tapestry Lifestyle segments found in the primary trade area.*

Parks and Rec: The primary trade area's most prominent lifestyle group is *"Parks and Rec,"* which represent 15.2 percent of North Side Historic District primary trade area households. They live in lower-density and well-established neighborhoods throughout the country. The average household size is 2.51, and many are two-income married couples approaching retirement age. They tend to live in mostly older neighborhoods with homes built before 1970 and are primarily homeowners with about 30% renters. The median home value for this group is $198,500.

Parks and Rec residents place a high importance on practicality and are very budget-conscious consumers. The workforce among this group is diverse, and includes professionals in health care, retail trade and education and skilled workers in manufacturing and construction. Their median household income ($60,000) is higher than the US median and their net worth is $125,500, which is also higher than the US median of $93,300.

Members of this group frequently visit local parks and engage in recreation activities. They tend to pass time at home watching documentaries. For an outing, they choose to dine at family-style restaurants and attend movies. They gamble on lottery tickets and practice poker and blackjack skills online. They tend to use cell phones for calls and texts only. In terms of purchasing patterns, these consumers are financially shrewd and carefully research big-ticket purchases. Convenience is important in the kitchen; they regularly use frozen or packaged main course meals. *Parks and Rec* residents also tend to stock up on staples at warehouse clubs.

Front Porches: *Front Porches* are a blend of household types, with more young families with children or single households than average. This group has a $43,700 median household income and more than half of households are renters. Many homes are duplex, triplex or quad and three-quarters of all homes were built before 1980. When shopping, they are not adventurous and price is more important than brand names or style. They go online for gaming, watching movies, employment searches and posting pics on social media. About 13 percent of Bethlehem's North Side Historic District primary trade area households are defined as *Front Porches.*

Fresh Ambitions: This group is composed of young families, many of whom are recent immigrants focusing life and work around their children. *Fresh Ambitions* residents are not highly educated, but many have overcome the language barrier and earned high school diplomas. They are on the edge of poverty but ambitious, working overtime in service and skilled or unskilled occupations, and their income is often supplemented with public assistance and social security. Nearly 9.8 percent of primary trade area households are classified as belonging to this group. They earn a $26,700 median household income and predominantly rent their homes. This group has a median age of 28.6 years old. As shoppers, they are price-conscious and budget around their children and families.

Exurbanites: About 9.3 percent of the North Side Historic District's primary trade area households are classified as *Exurbanites*, a group that is approaching retirement but are active in the community and shows little sign of slowing down. They take advantage of their proximity to large metropolitan areas but prefer more expansive home style in less crowded neighborhoods. They have an affluent household income of $103,400 and a majority are empty-nesters. In terms of purchasing patterns, these residents are interested in quality over cost. They shop for organic food products and take pride in their homes by spending on gardening and home improvement projects.

Midlife Constants: These residents are seniors, and about 42% of *Midlife Constants* residents are receiving Social Security. Traditional and not trendy, they are more country than urban and have lived in the same house for many years. Their median household income ($53,200) is below average but their median net worth ($138,300) is above average. They are attentive to price but not at the expense of quality. *Midlife Constants* residents like to contribute to arts/cultural, educational, health and social service organizations and belong to clubs. Technology has its uses, but bells and whistles are a bother. *Midlife Constants* opt for convenience and comfort, not the cutting-edge.

Figure 9: Bethlehem North Side Historic District
Primary Trade Area Tapestry Lifestyles

Lifestyle Group	*North Side Historic District Primary Trade Area Statistics*	*Lifestyle Summary*
 ***Parks and Rec***	Population **14,100** Households **7,200** Median HH Income **$60,000** Primary Trade Area Households **15.2%** US Market Share **2.0** %	These practical suburbanites have achieved the dream of home ownership. They have purchased homes that are within their means. Their homes are older, and town homes and duplexes are not uncommon. Many of these families are two-income married couples approaching retirement age; they are comfortable in their jobs and their homes, budget wisely, but do not plan on retiring anytime soon or moving. Neighborhoods are well established, as are the amenities and programs that supported their now independent children through school and college. The appeal of these kid-friendly neighborhoods is now attracting a new generation of young couples.
 ***Front Porches***	Population **12,400** Households **6,300** Median HH Income **$43,700** Primary Trade Area Households **13.4** % US Market Share **1.6** %	*Front Porches* blends household types, with more young families with children or single households than average. This group is also more diverse than the US. More than half of householders are renters, and many of the homes are older town homes or duplexes. Friends and family are central to *Front Porches* residents and help to influence household buying decisions. Households tend to own just one vehicle but used only when needed. Income and net worth of these residents are well below the US average.

Lifestyle Group	*North Side Historic District Primary Trade Area Statistics*	*Lifestyle Summary*
 ***Fresh Ambitions***	Population **9,600** Households **4,600** Median HH Income **$44,900** Primary Trade Area Households **9.8** % US Market Share **0.6** %	These young families, many of whom are recent immigrants, focus their life and work around their children. *Fresh Ambitions* residents work overtime in service, in skilled and unskilled occupations, and spend what little they can save on their children. Multigenerational families and close ties to their culture support many families living in poverty; income is often supplemented with public assistance and Social Security. Residents spend more than one-third of their income on rent, though they can only afford to live in older row houses or multiunit buildings. They budget wisely not only to make ends meet but also to save for a trip back home.
 ***Exurbanites***	Population **9,100** Households **4,300** Median HH Income **$103,400** Primary Trade Area Households **9.3** % US Market Share **1.9** %	Ten years later, *Exurbanites* residents are now approaching retirement but showing few signs of slowing down. They are active in their communities, generous in their donations, and seasoned travelers. They take advantage of their proximity to large metropolitan centers to support the arts but prefer a more expansive home style in less crowded neighborhoods. They have cultivated a lifestyle that is both affluent and urbane.
 ***Midlife Constants***	Population **5,800** Households **3,000** Median HH Income **$53,200** Primary Trade Area Households **6.4** % US Market Share **2.5** %	*Midlife Constants* residents are seniors, at or approaching retirement, with below average labor force participation and above average net worth. Although located in predominantly metropolitan areas, they live outside the central cities, in smaller communities. Their lifestyle is more country than urban. They are generous, but not spendthrifts.

Figure 9: *The top five Tapestry Lifestyle groups profiled above portray a mix of younger families and singles with older couples nearing or at retirement age.*

EMPLOYMENT BASE

The employment picture found in the North Side Historic District primary trade area reflects a concentrated services and retail trade sector foundation, comprising 74.6 percent of total employment. Compared to the secondary trade area, MSA and Pennsylvania as a whole, the percentage of employees in the primary trade area engaged in the services sector is high and manufacturing and government sectors is low.

As shown in Figure 10 below, the services sector employs the single largest percentage (64.1 percent) of people in the North Side Historic District primary trade area. This proportion of workers engaged in the services sector is higher than that for the secondary trade area, the MSA and Pennsylvania. Within the primary trade area's services sector, the largest percentage (24.8 percent of total employment in the primary trade area) work in other services, followed by 24 percent in health services and 9.4 percent in education institutions & libraries.

Figure 10: Employment Comparison by Sector (SIC)

Employment Sector	*Primary Trade Area*	*Secondary Trade Area*	*Allentown-Bethlehem-Easton MSA*	*Commonwealth of Pennsylvania*
Agriculture and Mining	**0.5%**	0.7%	1.0%	1.3%
Construction	**2.6%**	3.8%	3.7%	3.9%
Manufacturing	**6.1%**	6.3%	8.8%	9%
Transportation	**2.2%**	2.6%	2.8%	3%
Communication	**0.8%**	0.9%	0.8%	0.7%
Utility	**0.2%**	0.4%	0.4%	0.5%
Wholesale Trade	**5.5%**	4.6%	4.2%	4.1%
Retail Trade	**10.5%**	18%	18.6%	19%
Finance, Insurance & Real Estate	**4.5%**	5.7%	4.5%	6.1%
Services	**64.1%**	53.1%	50%	46.7%
Government	**2.7%**	3.7%	4.5%	5.2%
Unclassified	**0.2%**	0.4%	0.6%	0.5%

Figure 10: *Services and Retail Trade comprise the bulk of primary trade area employment.*

As the second leading category of employment, retail workers account for 10.5 percent of employment within the primary trade area. Within this category, eating & drinking places is the leading subcategory of employment comprising 4.5 percent of total employment, followed by miscellaneous retail (2.2 percent) and food stores (1.2 percent). However, the fact that retail is the second largest employment sector in the primary trade area does not necessarily mean that there is an oversupply of retail in the area; the size and scale of retailers may require a significant number of workers, but this is not indicative of how well these retailers are supplying goods and services to the surrounding community.

Figure 11: Drive Time and Trade Area Employment by Industry Sector

Employment Sector	*5-Minute Drive Time*	*10-Minute Drive Time*	*Primary Trade Area*
Agriculture & Mining	60	200	400
Construction	400	1,600	2,000
Manufacturing	900	3,400	5,000
Transportation	300	1,000	1,800
Communication	60	600	700
Utility	50	100	200
Wholesale Trade	300	4,000	4,400
Retail Trade	2,200	7,200	8,500
Home Improvement	100	300	400
General Merchandise Stores	30	400	400
Food Stores	200	800	1,000
Auto Dealers, Gas Stations, Auto Aftermarket	70	600	700
Apparel & Accessory Stores	50	300	300
Furniture & Home Furnishings	50	200	300
Eating & Drinking Places	1,200	3,200	3,600
Miscellaneous Retail	500	1,400	1,100
Finance, Insurance & Real Estate	1,200	2,800	3,600
Banks, Savings, & Lending Institutions	200	500	700
Securities Brokers	200	400	500
Insurance Carriers & Agents	300	900	1,000
Real Estate, Holding, Other Investment Offices	600	1,000	1,400
Services	8,700	46,900	51,700
Hotels & Lodging	200	1,700	2,400
Automotive Services	100	600	700
Motion Pictures & Amusements	200	900	1,300
Health Services	1,300	18,200	19,400
Legal Services	300	400	7,500
Education Institutions & Libraries	3,200	6,900	6,300
Other Services	3,200	18,200	20,000
Government	1,000	1,900	1,700
Unclassified Establishments	20	100	500
Total Employment	**15,400**	**69,800**	**80,500**

Figure 11: *The North Side Historic District primary trade area's employment by sector.*

Daytime employment plays a large role in supporting retail. The primary trade area is estimated to have 80,500 employees; an estimated 26,000 of them are office employees who are known to expend at much higher rates, often eating out for lunch and shopping on the way to and from work. The mix of employees throughout the ten-minute drive time varies from the primary trade area most noticeably in the services industry sector, with an additional 4,800 employees within the primary trade area compared to the 10-minute drivetime.

Services, retail and finance, insurance & real estate (FIRE) employ the most people by industry inside the ten-minute drivetime with 46,900, 7,200 and 2,800 jobs, respectively. With nearly 70,000 workers within a ten-minute drive time, there appears to be many captive daytime consumers close to Bethlehem's North Side Historic District study area.

Consumer expenditure from daytime employment compliments that captured in the evenings and on weekends by households in the trade area. "*Office Worker Retail Spending in a Digital Age*," published by the International Council of Shopping Centers in 2012, provides insight into the impact of office worker employment. Weekly office worker expenditure, adjusted for 2019 dollars, is estimated at $180. Weekly non-office worker expenditure is estimated at 37 percent of office workers.

Figure 12: Ten Minute Drive-Time Worker Expenditure

Category	*Weekly Expenditure*	*Annual Expenditure*	*Office Worker Expenditure*	*Non-Office Worker Expenditure*	*Total Expenditure*
Prepared Food & Beverage					
Limited & Full-Service Restaurants	$40	$2,300	$59,500,000	$38,900,000	$98,400,000
Drinking Places	$20	$800	$21,600,000	$14,200,000	$35,800,000
Retail Goods					
General Merchandise, Apparel, Home Furnishings, Electronics	$70	$3,600	$94,600,000	$61,900,000	$156,600,000
Grocery	$30	$1,600	$40,600,000	$26,600,000	$67,100,000
Convenience Items	$20	$1,000	$27,000,000	$17,700,000	$44,700,000
Total	**$180**	**$9,300**	**$243,400,000**	**$159,300,000**	**$402,700,000**

Figure 12: *Employees within ten minutes of the study site expend $402.7 million dollars annually.*

Non-office workers are estimated to have slightly less disposable income, to have multiple work locations including at home and typically are on the road more during their work-week. Retail purchases (general merchandise, apparel, home furnishings, electronics, grocery and convenience items) make up the majority of the office worker dollars, at $70 per week. Restaurant expenditures (full service, limited service and drinking places) account for the balance at $44 per week. Annualized, each office worker expends $9,400 before, during and after work.

The annual impact of 69,800 workers within ten minutes of the North Side Historic District study area is $402.7 million. This expenditure breaks down to include $134.2 million in prepared food and beverage establishments, $67.1 million in grocery purchases, $156.6 million in retail sales and $44.7 million in convenience items. Catering to the daytime worker crowd with fast-casual restaurants, convenient parking and extended evening hours may increase the worker expenditure captured by study area retailers.

NORTH SIDE HISTORIC DISTRICT AREA CHARACTERISTICS

Location

The City of Bethlehem, of which the North Side Historic District is a part, is roughly 19 square miles. It is in eastern Pennsylvania, 50 miles northwest of Philadelphia and 90 miles west of New York City. Bethlehem has a rich colonial and industrial heritage and historically served as the headquarters of the Bethlehem Steel Corporation, once the country's second-largest steel producer.

Figure 13*: The North Side Historic District (pictured above) is one of Bethlehem's two downtowns (the other being the Southside Arts District).*

The North Side Historic District is situated on the north bank of the Lehigh River. It encompasses roughly ⅓ square miles and is bordered by East Walnut and East Broad Streets to the north, 1st Avenue to the west, Linden Street to the east and the Lehigh River to the south. It is a vibrant commercial historic district that features approximately 175,000 sf of retailers and restaurants. In total, the North Side Historic District contains about twenty shops, twenty-five restaurants, five hotels and many historic attractions such as the Moravian Museum, Colonial Industrial Quarter and the Moravian Book Shop (America's oldest bookstore). Most of the district's shopping is concentrated along Main Street between Church and West Broad Streets. The North Side Historic District is anchored by City Hall and the adjacent Bethlehem Area Public Library (both just north of Center Street), as well as Moravian College. Its walk score is 86, which classifies it as "very walkable."

Figure 14*: The Moravian Bookstore in the North Side Historic District is the oldest continuously operating bookstore in the world.*

Access

Regional linkage is strong in the primary trade area. The North Side Historic District and South Side Arts District are connected by three bridges across the Lehigh River: Hill to Hill Bridge, Fahy

Bridge and Minsi Trail Bridge. Significant traffic enters the study area from the north via U.S. 22 and Schoenersville Road, from the south via I-78, PA 378 and Hellertown Road, and from the east and west via PA 378, Union and Stefko Boulevards. Furthermore, there is a dense urban grid and network of streets and sidewalks surrounding the downtown Bethlehem study areas that make them easily accessible.

Figure 15: Traffic Counts

Road	***AADT (2018)***
U.S. Route 22	83,000
I-78	51,000
PA 378	38,000
Schoenersville Road north of Catasauqua Road	29,000
Stefko Blvd between 3rd Street and Broad Street	20,000
8th Avenue	18,000
Union Boulevard	15,000
3rd Street	14,000
Linden Street	14,000
Center Street north of Elizabeth Avenue	13,000
Easton Avenue	10,000

Figure 15*: The traffic chart shows the heaviest traffic on U.S. 22 and I-78, both of which run through the study areas (source: Pennsylvania Department of Transportation).*

General Retail Market Conditions

According to CoStar, Bethlehem has a total of 5.3 million sf of retail space. The city’s current retail market rent/sf is $14.35/sf, a figure that has decreased by 1 percent from one year ago. Its current retail vacancy rate is 6.5 percent, which has decreased by 1.1 percent over the last year and is just slightly above its 10 year average vacancy rate of 6.5 percent. While no retail space was delivered over the past year, currently 14,300 sf of retail space is under construction. The city’s twelve-month retail real estate sales volume reached $22.9 million, and these properties sold at an average cap rate of 9.2 percent (unchanged from the prior period) and for $121/sf (up 2.1 percent from the prior period).

Figure 17*: Photos of Christkindlmark (pictured on left) and Weihnachtsmark (pictured on right).*

Christmas City Tourism

Bethlehem is known as “The Christmas City” and the holiday is central to the city’s identity. In fact, it was on Christmas Eve in 1741 that the community was christened “Bethlehem.” Every year, from November 22nd to December 22nd, the North Side Historic District and South Arts District host Christmas markets filled with artisan craft and retail vendors. The largest and most popular of these is Christkindlmark. Christkindlmark in the South Arts District is a German-style holiday market that features 125 vendors.

Not surprisingly, around the holidays the city is replete with decorations. In the 1960's the Citizens Christmas City Committee was formed to help dignify the look of Christmas in the city and the Committee continues to raise over $15,000 every year to purchase over 800 trees. White lights decorate the trees on the city's north side (including the North Side Historic District) while colored lights adorn trees on the south side. Also, around the holidays Hotel Bethlehem has a display of over 35,000 Christmas lights, a myriad of uniquely decorated Christmas trees, 36 wreaths, six 7-foot-tall toy soldiers, two life-sized nutcrackers and a gingerbread house modeled after the hotel.

Bethlehem City Hall and Public Library

Figure 16: *Bethlehem's central plaza (pictured on left) overlooks the Lehigh River and is home to City Hall and the Public Library as well as a Zen Garden and Sculpture Garden (pictured on right).*

Bethlehem City Hall and the Bethlehem Public Library are located near the bank of the Lehigh River on Church Street in the North Side Historic District. These civic uses are designed around a walkable plaza which includes the Bethlehem Zen Garden and Bethlehem Sculpture Garden. Bethlehem's Public Library moved to its curent location in 1967 and today is an anchor in the community and receives over 200,000 annual visitors. Aside from its books, the library hosts programs and events for both children and adults throughout the year.

Historic Hotel Bethlehem

The historic Hotel Bethlehem, on Main Street in the North Side Historic District, traces its roots back to the 18th century. The hotel is on the same site where, in 1741, the first house in Bethlehem was built. In the early 19th century, as the city grew and traffic increased, the house was converted to an inn (the Eagle Hotel). The Eagle Hotel operated in that incarnation until 1919 when the building started housing convalescing soldiers returning from World War I.   Then in the early 1920s, a group of Bethlehem businessmen led by Charles Schwab organized a project that led to the construction of an $800,000, 200-room building they called Hotel Bethlehem. Schwab built the hotel to cater to the clients of the Bethlehem Steel Company, and from the beginning Hotel Bethlehem featured amenities equivalent to modern day luxuries, such as a fitness center, barber shop, shoeshine and coffee shop. The hotel became the center of the city's social life, and as Bethlehem Steel rose to prominence as the nation's second largest producer of steel the Hotel Bethlehem prospered. Therefore, it should not be surprising that over the years the hotel has had a slew of famous guests including Winston Churchill, John F. Kennedy, Muhamad Ali, Bill Clinton and Bernadette Peters.

***Figure 18**: In 2019, the Hotel Bethlehem was named the third-best historic hotel in the United States by USA Today readers.*

Today, the Hotel Bethlehem is one of the downtown's primary anchors. It has 125 restored guest rooms and suites, which range from 200 sf "traditional rooms" to 850 sf suites. All rooms have complimentary fiber optic Wi-Fi, 24-hour room service, and suites have multiple LCD TVs, living rooms and French doors. The hotel has two restaurants (1741 on the Terrace and the Tap Room), a full-service business center and an on-site fitness center. The historic Hotel Bethlehem is also a popular wedding and event venue, featuring 19,000 sf of meeting and banquet space including the Mural Ballroom (which seats up to 250 people) and the Grand Ballroom (which seats up to 140 people). Both of these ornate spaces have 1920s décor, and while the Grand Ballroom features stunning balconies and large arched mirrors, the Mural Ballroom is decorated with seven large murals painted by Gregory Gray in 1936 that retell the story of Bethlehem.

Wind Creek Bethlehem

What is now Wind Creek Bethlehem originally opened as Sands Casino Resort Bethlehem in 2009. Today the Wind Creek Bethlehem resort features a casino, hotel, shopping, restaurants, a spa and family entertainment. More specifically, the 180,000 sf casino floor has over 3,000 slot machines and 200 table games. The resort's hotel is a 282-room AAA Four Diamond Hotel with over 12,000 sf of meeting space and a wide range of eateries that include three signature restaurants from celebrity chef Emeril Lagasse – Emeril's Chop House, Burgers and More by Emeril and Emeril's Fish House.   Wind Creek Bethlehem also includes the Steel Magnolia Spa & Salon and a family entertainment and childcare facility (Kids Quest and Cyber Quest).

Additionally, an indoor shopping center (The Outlets at Wind Creek Bethlehem) connects the casino and hotel. Opened in 2011, The Outlets at Wind Creek Bethlehem features 130,000 sf of retail space and includes retailers such as Coach, DKNY, GUESS Factory Store, Kay Jewelers Outlet, Michael Kors, Tommy Hilfiger and Van Heusen. This shopping center, as well as the larger Wind Creek Bethlehem resort, is owned by Wind Creek Hospitality.

***Figure 19**: In May 2019 Wind Creek Hospitality purchased Wind Creek Bethlehem for $1.4 billion.*

The owners have announced plans to expand the resort in the near future. Indeed, in 2020 Wind Creek Bethlehem will begin construction on two new projects. The first will be a $90 million hotel with 276 guest rooms and 42,000 sf of meeting space, and the second will be a 300,000 sf adventure and water park.

Lehigh University

***Figure 20:** Lehigh University's picturesque campus (pictured on the left) spans 2,300 acres. Farrington Square (pictured on the right) is a recent addition to the northern section of campus and includes housing, local shops and fast casual eateries.*

Located in southern Bethlehem, roughly one mile south of the North Side Historic District, Lehigh University is home to 7,000 undergraduate and graduate students. Its scenic campus is on the wooded slope of South Mountain and spans 2,300 acres. Lehigh University has four colleges (the P.C. Rossin College of Enginerring and Applied Science, the College of Arts and Sciences, the College of Business and Economics and the College of Education) and offers over 100 degree programs. In its most recent edition of school rankings, *U.S. News & World Report* ranked Lehigh as the tied for 50th among national universities, 26th for "Best Value Schools" and 30th for "Best Undergraduate Teaching." Recently, the university opened Farrington Square, a project to help facilitate downtown revitalization and blur the boundary between campus and City of Bethlehem. Farrington Square is home to the Bethlehem Farmer's Market, the university bookstore, the university postal office, an ice cream shop and a café.

Desales University

This private Catholic university of 3,500 students is situated 5.5 miles south of the North Side Historic District. DeSales University was established in 1964 and today offers 40 bachelor's degrees, seven graduate degrees and two doctoral programs. The 2020 edition of *Best Colleges* from *US News & World Report* ranked DeSales University as 59th in "Regional Universities North," 36th in "Best Value Schools," and 33rd in "Best Colleges for Veterans." Priding itself on its small class size, DeSales University has a student/faculty ratio of 15:1 and an average class of just 18 students.

Northampton Community College

Northampton Community College (NCC) is a community college with campuses in Bethlehem Township and Tannersville, Pennsylvania. It was founded in 1967 and serves more than 34,000 students in over 100 fields. NCC's main Bethlehem campus encompasses 208 acres and is located 5 miles northeast of the North Side Historic District. Additionally, NCC's Fowler Center is situated in the former Bethlehem Steel Corporation headquarters in the Southside Arts District. The Fowler Center is an educational facility that is home to several of the school's programs, including its hospitality, dental hygiene, leadership and executive development institutes.

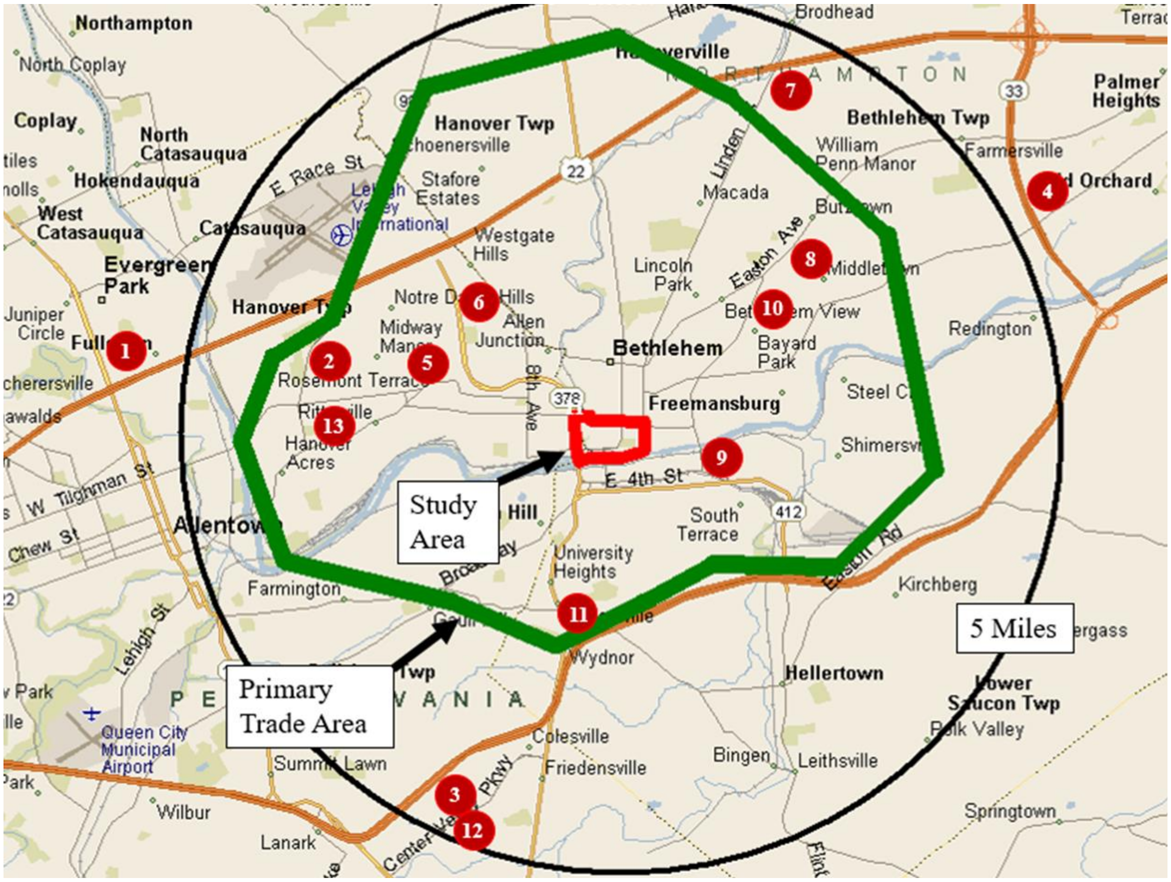
Moravian College

Figure 22: *Moravian College's Priscilla Payne Hurd Campus occupies a portion of the North Side Historic District in downtown Bethlehem, including several historic buildings such as the Brethren's House (right), built in 1748.*

Founded in 1742, this small liberal arts college of 1,700 full-time students is the sixth-oldest college in the country and the first to educate women. Moravian College offers degrees in more than 50 areas of study, and the school has more than 80 different clubs and organizations. The *Princeton Review* has ranked Moravian College among the top 13 percent of four-year colleges, and the *Bloomberg Business Week* has ranked the school among the top 25 percent of four-year colleges. Moravian College's south campus is known as the Priscilla Payne Hurd Campus and is in Bethlehem's North Side Historic District. The college's art and music programs are based on the Pricilla Payne Hurd Campus, and many of its buildings are historic, having been built during the Colonial Period.

AREA SHOPPING CENTERS

Figure 23: Bethlehem Area Shopping Centers



Retail Center Name	*Shopping Center Type*	*Retail Size (sf)*	*Distance to North Side Historic District*
1. Lehigh Valley Mall	Lifestyle Center	1.2 million sf	5 miles
2. Airport Shopping Center	Power Center	510,000 sf	3 miles
3. The Promenade Shops	Lifestyle Center	480,000 sf	4 miles
4. Southmont Plaza	Power Center	390,000 sf	5 miles
5. Lehigh Shopping Center	Community Center	370,000 sf	1.5 miles
6. Westgate Mall	Community Center	300,000 sf	1.5 miles
7. Bethlehem Square	Power Center	300,000 sf	4 miles
8. Easton Commons	Community Center	170,000 sf	3 miles
9. Outlets at Wind Creek	Outlet Mall	130,000 sf	< 1 mile
10. Stefko Blvd. Shopping Center	Neighborhood Center	130,000 sf	2 miles
11. Saucon Valley Square	Neighborhood Center	80,000 sf	2 miles
12. Shoppes at Old Saucon	Lifestyle Center	80,000 sf	4.5 miles
13. Allentown Commons	Neighborhood Center	70,000 sf	3 miles

Figure 23: *Map and table of the competing lifestyle, power, community, outlet and neighborhood shopping centers.*

1. Lehigh Valley Mall

***Figure 24**: In terms of square footage, the Lehigh Valley Mall is the largest shopping center in Pennsylvania's Lehigh Valley region.*

Lehigh Valley Mall is in the City of Whitehall, 5 miles northwest of the North Side Historic District. Totaling 1.2 million sf of retail space, it consists of a super-regional, two-level enclosed shopping center combined with an outdoor lifestyle center. The original enclosed mall was opened in 1976, underwent major renovations in 1995, and expanded with the 110,000 sf lifestyle center in 2007. Today the Lehigh Valley Mall is anchored by Macy's, JC Penney, Barnes & Noble and Boscov's and has nearly 150 other retailers that include Apple, Chico's, Express, lululemon, Pottery Barn, Sephora, Williams Sonoma and Vera Bradley. Additionally, it features various dining options including Bonefish Grill, Bravo! Cucina Italiana and Pocono Brewing Co. The Lehigh Valley Mall is owned by Simon Property Group.

2. Airport Shopping Center

Located in the City of Allentown, at the corner of Route 22 and Airport Road, Airport Shopping Center is a 510,000 sf power center. It is anchored by Sam's Club, Target, Ross Dress for Less, Ulta and DSW, and has a total of 34 stores. Currently, it is 99 percent occupied. Airport Shopping Center opened in 2009 and is currently owned by Goodman Properties.

***Figure 25**: Sam's Club (at 155,000 sf) and Target (at 130,000 sf) are the largest anchor tenants at the Airport Shopping Center*

3. The Promenade Shops at Saucon Valley

The Promenade Shops at Saucon Valley is a 480,000 sf outdoor lifestyle center located in southern Allentown, approximately 4 miles from the North Side Historic District. Some of the major retailers that can be found here are American Eagle Outfitters, Banana Republic, Barnes & Noble, Brooks Brothers and the first L.L. Bean in the Commonwealth of Pennsylvania. This shopping center also features upscale restaurants that include Top Cut, Melt, Torre, Kome Fine Japanese Cuisine and White Orchids Thai Cuisine, and more casual restaurants like Red Robin and Bar Louie. Additionally, The Promenade Shops has a Fresh Market and 16-screen AMC Theatre. The landscaped "Main Street" at the Shops provides outdoor gathering areas and event space and includes an interactive pop-jet fountain. This shopping center allows dogs in the common outdoor areas as well as inside participating stores. Lastly, the Promenade Shops is owned by Poag Shopping Centers (who was also its developer).

Figure 26*: Last fall, The Promenade Shops at Saucon Valley welcomed new tenants Bath & Body Works (pictured on left) and Playa Bowls (pictured on right).*

4. Southmont Plaza

Southmont Plaza is a 390,000 sf power center located at the intersection of Freemansburg Avenue and Route 33, which is 5 miles from the North Side Historic District. This shopping center has a number of outparcels and includes tenants such as Lowe's, Michaels, Dick's Sporting Goods, Best Buy, Bed Bath & Beyond and Barnes & Noble. Currently, it enjoys a 98 percent occupancy rate. Southmont Plaza is a joint venture between SITE Centers and Blackstone Real Estate Partners VII.

5. Lehigh Shopping Center

Owned by Brixmor Property Group, the Lehigh Shopping Center is a 375,000 sf community center. It is located at the intersection of Pennsylvania Avenue and Union Road (just south of U.S. Route 22), roughly 1.5 miles from the North Side Historic District. It is anchored by a 60,000 sf Giant Food supermarket, and its other retailers and restaurants include Marshalls, Big Lots, PetSmart, Staples, Citi Trends and Border Line Family Restaurant. Additionally, this shopping center is home to an 85,000 sf Aetna corporate office. The Lehigh Shopping Center opened in 1955, expanded over time and was last renovated in 2003.

6. Westgate Mall

Located in northwest Bethlehem, 1.5 miles northwest of the North Side Historic District, Westgate Mall is a 300,000 sf community center. It began as an outdoor strip mall in 1965 and expanded into an enclosed mall in 1973, giving Westgate its current configuration as a combined open strip and enclosed shopping center. Westgate Mall is anchored by Weiss Markets and has 20 other tenants including Rite Aid, Kay Jewelers, GNC and Subway. In August 2015, Westgate Mall underwent a $5 million dollar renovation to update its façade and add a Sky Zone Trampoline Park. The Westgate Mall was acquired by a joint venture between Onyx Equities and PCCP, LLC, in 2018. Recently, CBRE (the mall's leasing agent) announced plans to re-brand the mall, which is currently 77 percent occupied.

***Figure 27**: Built in 1973, the Westgate Mall underwent a $5 million renovation in 2015, the same year Sky Zone Trampoline Park opened a 20,000 sf facility in the shopping center.*

7. Bethlehem Square

Developed by Rosenshein Associates, Bethlehem Square is a 390,000 sf power center. It opened in 1987 and was renovated in 1994. It is anchored by Walmart, Home Depot, T.J. Maxx, Home Goods and Giant Food Stores and has about 20 additional tenants. The Walmart opened in 2002 and replaced a Bradlees department store. In February 2019, Brixmor Property Group sold this shopping center to The Klein Group. Bethlehem Square is located 4 miles from the North Side Historic District.

8. Easton Commons

***Figure 28**: Easton Commons is home to a 75,000 sf Giant Food supermarket and a 30,000 sf Petco.*

Built in 1982, Easton Commons is located on Easton Avenue in the Middletown residential neighborhood of Bethlehem. This 170,000 sf community center is anchored by a Giant Food supermarket, Petco and Maxx Fitness Clubzz, and its other tenants include Vic's Bagels, T&M Nails, Sport Clips and Family Dollar. Easton Commons is currently 95 percent occupied. It is owned by Urban Edge Properties and is situated 3 miles from the North Side Historic District.

9. Outlets at Wind Creek

***Figure 29**: The Outlets at Wind Creek is part of the larger Wind Creek Bethlehem casino resort.*

Formerly The Shoppes at Sands Bethlehem, The Outlets at Wind Creek is an indoor shopping mall located inside the Wind Creek Bethlehem resort. It connects the resort's casino and the hotel and has 130,000 sf of retail space. There are 27 retailers at this outlet center, which include businesses that offer clothing, electronics, household goods, jewelry and specialty items. Additionally, The Outlets at Wind Creek features a European spa and salon, Kids Quest/Cyber Quest (a childcare and family entertainment center) and a food court next to the casino entrance. Clothing brands include Coach, Under Armour, Michael Kors, Talbots and Guess. It is owned by the Poarch Band of Creek Indians and is situated less than a mile from the North Side Historic District.

10. Stefko Boulevard Shopping Center

Located 2 miles northeast of the North Side Historic District, the Stefko Boulevard Shopping Center is a 130,000 sf neighborhood center. It is anchored by a local grocer tenant, Valley Farm Market, which occupies 75,000 sf of the center. There are about 20 additional tenants here including a Retro Fitness, Dollar Tree, Fine Wine & Good Spirits and Metro PCS. Currently, the Stefko Boulevard Shopping Center is 95 percent occupied and is owned by Regency Centers.

11. Saucon Valley Square

Saucon Valley Square, owned by First National Realty Partners, is an 80,000 sf neighborhood shopping center. It is located on Route 378, 2 miles from the North Side Historic District. Maxx Fitness Clubzz and Dollar Tree anchor the center, with other tenants such as Subway, Taps Tavern, and Casa Mia Pizzeria. Saucon Valley Square recently lost a major tenant, Revolutions (which contains a restaurant, bar and bowling alley), leaving a 30,000 sf vacancy.

12. Shoppes at Old Saucon

Located in Saucon Valley adjacent to the Saucon Valley Country Club and the Stabler Corporate Center, The Shoppes at Old Saucon is currently under construction. Upon completion, it will be a 70-acre mixed-use development featuring 80,000 sf of retail and restaurant space, as well as office space and upscale residential housing.

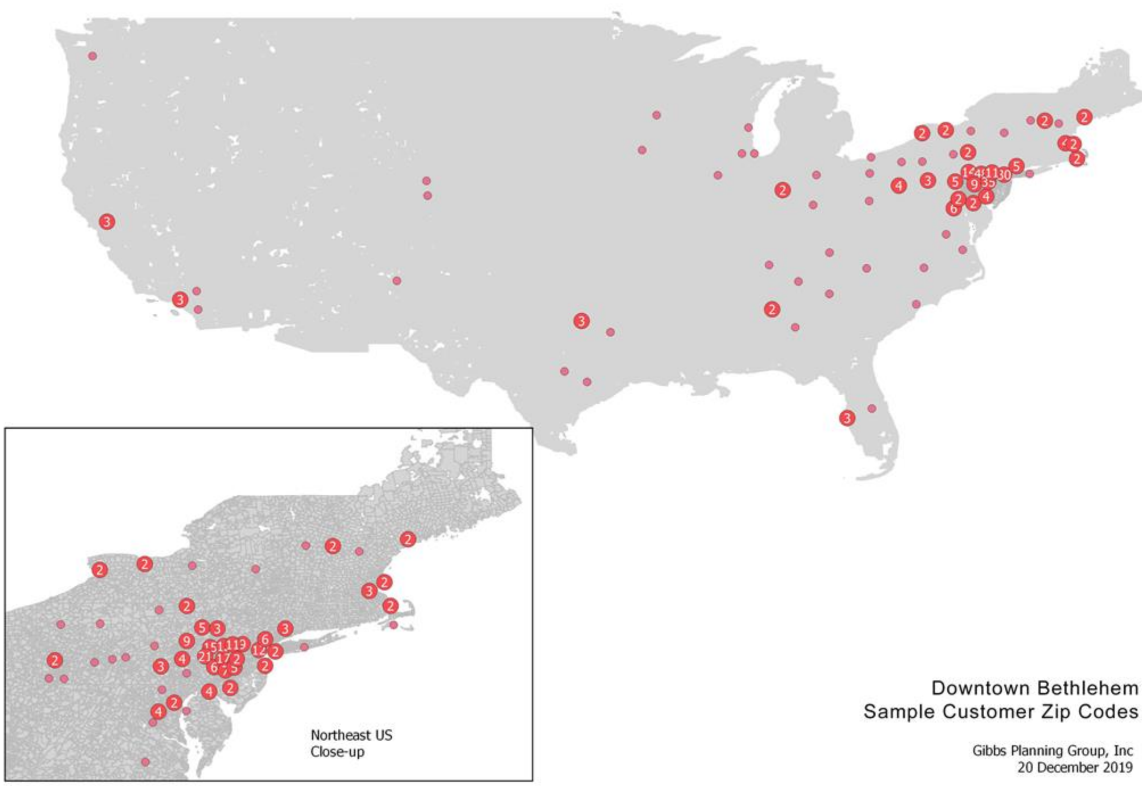
13. Allentown Commons

Allentown Commons is a one-story, five-building neighborhood center. Totaling 70,000 sf, it is anchored by Planet Fitness and Family Dollar, with other tenants such as D Mart Farmers Market, Popeyes, Big Woody's Bar & Grill and Metro PCS. Allentown Commons is currently 93 percent leased and is situated 3 miles from the North Side Historic District.

RETAIL & RESTAURANT DEMAND

This study estimates that existing or new commercial businesses located in Bethlehem's North Side Historic District can realistically expand by up to $73.6 million in additional sales in 2019, potentially growing to $77.3 million by 2024. If achieved, this growth could support up to 140,000 sf of new retailers and 70,000 sf of new restaurants, for a total of 210,000 square feet. This growth could be absorbed with the opening of 60-75 new retail businesses or by existing stores through expanded operations and marketing. If managed per industry best practices, these new stores could generate above average sales of $345 per square foot per year.

The North Side Historic District can support additional stores generating up to $51.2 million in new sales in 2019 growing up to $53.8 million in 2024. The market can also support brew-pub, full-service, limited-service and specialty food restaurants producing up to $22.4 million in annual sales in 2019, potentially growing to $23.5 million in 2024.



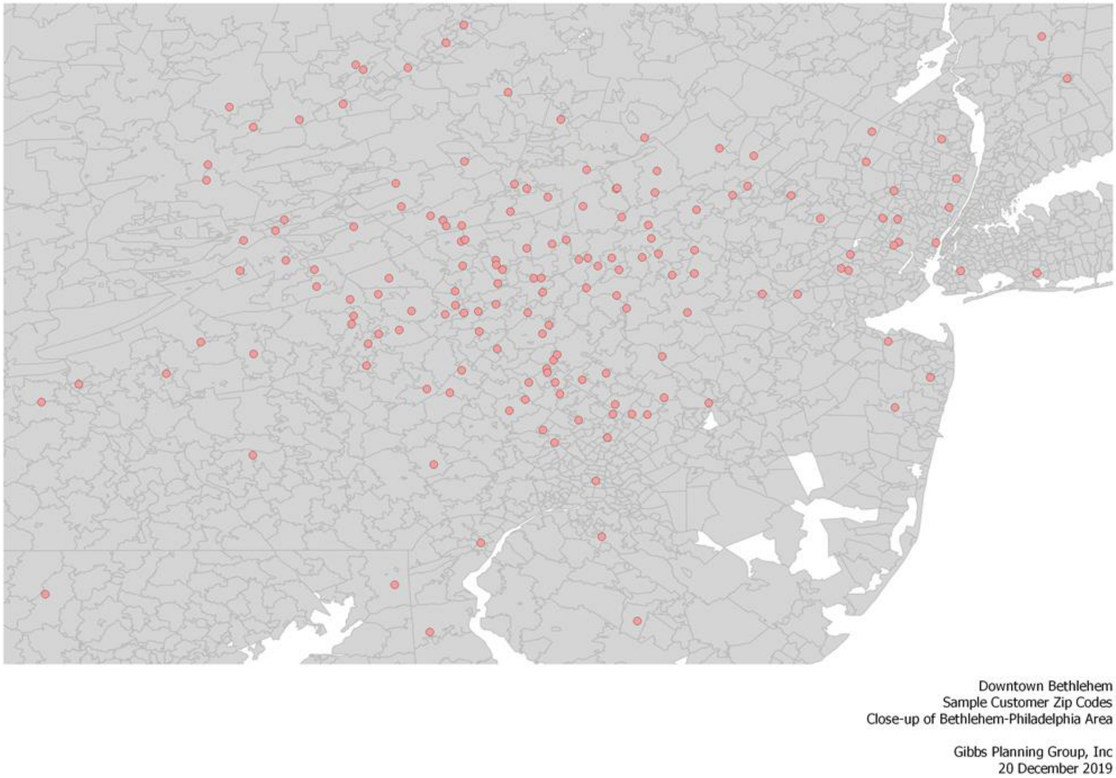


***Figure 30**: The above maps display sample data that GPG received for one store in in the North Side Historic District. Each data point represents a customer that visited the store within the last month. This data illustrates that the North Side Historic District is visited by shoppers from across the Bethlehem-Philadelphia area and country generally.*

Analysis Assumptions

Gibbs Planning Group, Inc. has assumed the following factors in the completion of this commercial market analysis:

- No major regional retail centers will be developed within the defined North Side Historic District trade areas of this analysis through 2024.
- The Bethlehem region's economy will continue at normal or above normal ranges of employment, inflation, retail demand and growth.
- Properties inside the North Side Historic District study area will be properly zoned and have the necessary infrastructure necessary to support new commercial development.
- Annual population growth for the primary trade area is estimated to be 0.31 percent from 2019 to 2024.
- Any new commercial development in the Bethlehem North Side Historic District study area will be planned, designed, built and managed to the best practices of the American Institute of Architects, American Planning Association, American Society of Landscape Architects, Congress for New Urbanism, International Council of Shopping Centers and The Urban Land Institute.

See GPG's supportable retail table, Figure 31. Note, these figures are in addition to existing Bethlehem North Side Historic District businesses and only reflect potential new demand. This study does not necessarily recommend that the City of Bethlehem pursue any or all of this forecast commercial demand.

Figure 31: Supportable Retail Table

Retail Category	Total Demand	Estimated Supp. SF		2019 Sales/SF	2019 Est. Retail Sales	2024 Sales/SF	2024 Est. Retail Sales
Retailers							
Apparel Stores	$83,742,047	22,200	sf	$380	$8,436,000	$400	$8,880,000
Book & Music Stores	$17,337,357	2,400	sf	$285	$684,000	$300	$720,000
Department Store Merchandise	$175,368,102	24,600	sf	$330	$8,118,000	$345	$8,487,000
Electronics & Appliance Stores	$69,290,876	8,900	sf	$460	$4,094,000	$485	$4,316,500
Florists	$8,472,965	2,300	sf	$265	$609,500	$280	$644,000
Furniture Stores	$33,618,734	9,000	sf	$380	$3,420,000	$400	$3,600,000
General Merchandise Stores	$87,626,574	9,500	sf	$285	$2,707,500	$300	$2,850,000
Grocery Stores	$301,826,986	14,600	sf	$520	$7,592,000	$545	$7,957,000
Hardware	$86,472,454	7,300	sf	$320	$2,336,000	$335	$2,445,500
Home Furnishings Stores	$32,121,638	1,700	sf	$375	$637,500	$395	$671,500
Jewelry Stores	$26,022,130	3,600	sf	$445	$1,602,000	$465	$1,674,000
Garden Stores	$10,725,658	1,500	sf	$265	$397,500	$280	$420,000
Miscellaneous Store Retailers	$64,608,433	11,200	sf	$290	$3,248,000	$305	$3,416,000
Gift Stores	$35,950,578	7,200	sf	$340	$2,448,000	$355	$2,556,000
Shoe Stores	$23,945,149	5,200	sf	$325	$1,690,000	$340	$1,768,000
Food: cheese, meats & produce	$22,477,955	5,600	sf	$295	$1,652,000	$310	$1,736,000
Sporting Goods & Hobby Stores	$45,212,228	4,600	sf	$340	$1,564,000	$355	$1,633,000
Retailer Totals	**$1,124,819,864**	**141,400**	**sf**	**$347**	**$51,236,000**	**$364**	**$53,774,500**
Restaurants							
Bars, Breweries & Pubs	$44,508,514	13,600	sf	$370	$5,032,000	$390	$5,304,000
Full-Service Restaurants	$154,028,061	19,200	sf	$380	$7,296,000	$400	$7,680,000
Limited-Service Eating Places	$130,032,584	17,000	sf	$290	$4,930,000	$305	$5,185,000
Bakery, coffee, ice cream, etc.	$37,397,149	16,300	sf	$315	$5,134,500	$330	$5,379,000
Restaurant Totals	**$365,966,309**	**66,100**	**sf**	**$339**	**$22,392,500**	**$356**	**$23,548,000**
Retailer & Restaurant Totals	**$1,490,786,173**	**207,500**	**sf**	**$345**	**$73,628,500**	**$363**	**$77,322,500**

***Figure 31**: Estimated additional retail and restaurant demand for the North Side Historic District. GPG estimates the North Side Historic District can presently support 141,400 sf of additional retail space and 66,100 sf of additional restaurant space totaling 207,500 sf. Note, this additional demand could be absorbed by existing businesses through expanded operations. Note: Sales stated in constant 2019 dollars.*

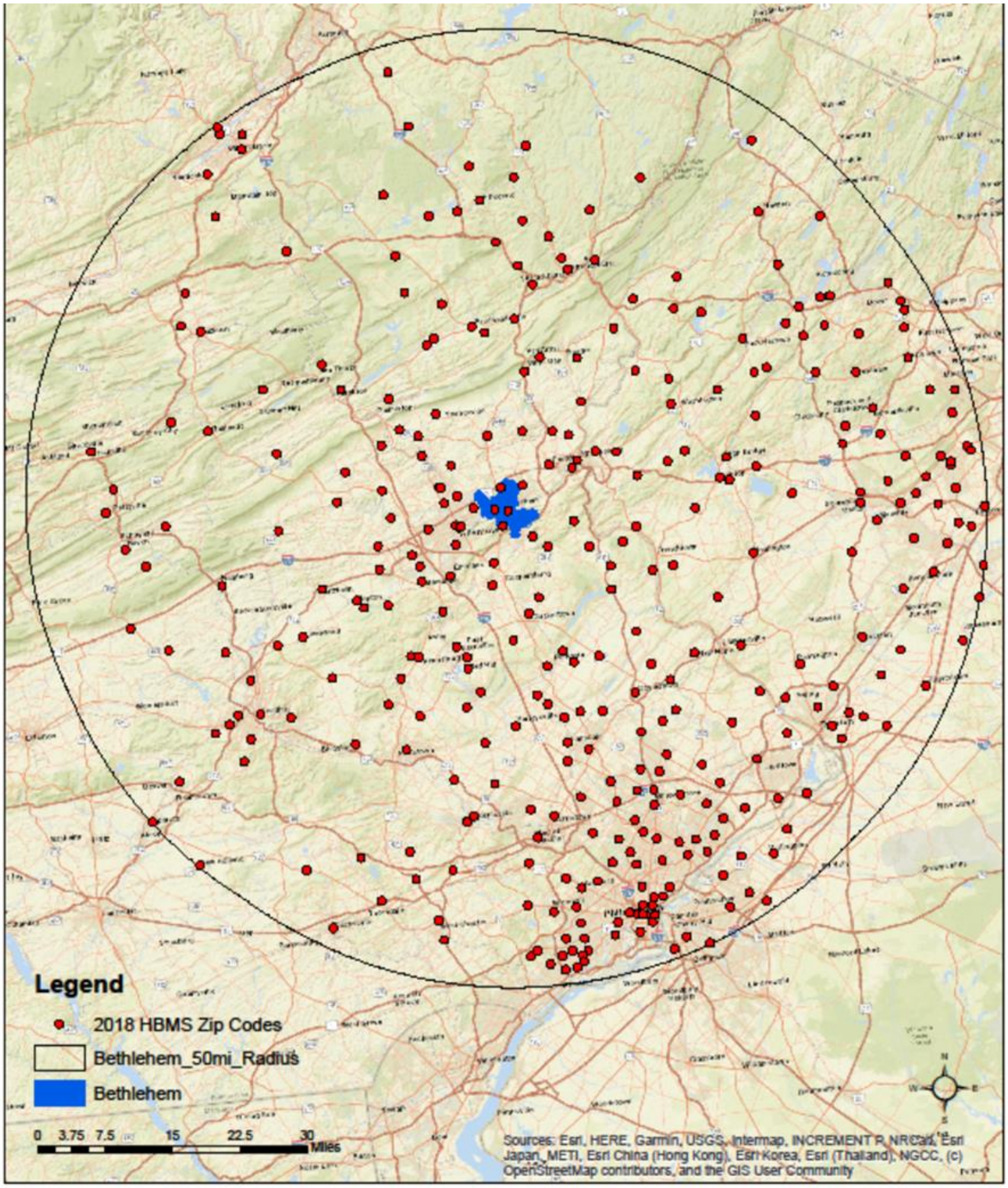


Figure 31*: Map illustrating the zip codes of visitors to Bethlehem's visitors center during 2018 within a 50 mile radius.*

Recommended Retailers

Based upon our analysis, GPG recommends the following national retailers and restaurants for Bethlehem's North Side Historic District: Orvis, Anthropologie, Pandora, Johnston & Murphy, Pottery Barn, First Watch, Blaze Pizza, Jimmy John's and Zoup.

Rationale

The rationale for the findings in this study as follows:

- **Historic and Walkable Setting**: With its easily navigable streets and historic character, the North Side Historic District offers a very appealing location for additional retailers and restaurants.

- **Tourism**: North Side Historic District retailers and restaurants greatly benefit from the many tourists that visit Bethlehem, particularly around the holidays when the area hosts numerous popular Christmas festivals

- **Large Consumer Base:** With 122,000 year-round residents, 47,300 households and 80,500 workers, 10,000 students and 3 million tourists in the primary trade area, there is a large market for goods, services and restaurants.

- **Strong Competition:** North Side Historic District retailers and restaurants face significant competition from the plethora of shopping centers in the area.

Retail Category Definitions

Retail categories in the Supportable Retail Table correspond to the North American Industry Classification System (NAICS), the standard used by Federal statistical agencies in classifying business establishments for the purpose of collecting, analyzing, and publishing statistical data related to the U.S. business economy. The following NAICS codes and definitions are provided by the U.S. Census Bureau:

Retail

Auto Supply Stores (4411): establishments known as automotive supply stores primarily engaged in retailing new, used, and/or rebuilt automotive parts and accessories, automotive supply stores that are primarily engaged in both retailing automotive parts and accessories and repairing automobiles; establishments primarily engaged in retailing and installing automotive accessories; and establishments primarily engaged in retailing new and/or used tires and tubes or retailing new tires in combination with automotive repair services.

Furniture Stores (4421): establishments primarily engaged in retailing new furniture, such as household furniture (e.g., baby furniture box springs and mattresses) and outdoor furniture; office furniture (except those sold in combination with office supplies and equipment); and/or furniture sold in combination with major appliances, home electronics, home furnishings and/or floor coverings.

Home Furnishings Stores (4422): establishments primarily engaged in retailing new home furnishings (except furniture).

Electronics and Appliance Stores (4431)**:** establishments primarily engaged in retailing the following new products: household-type appliances (refrigerator, dishwasher, oven), cameras, computers/software, televisions and other electronic goods.

Hardware Stores (4441): establishments primarily engaged in retailing new building materials and supplies (lumber, plumbing, electrical, tools, housewares, hardware, paint, and wallpaper).

Lawn and Garden Supply Stores (4442): establishments primarily engaged in retailing new lawn and garden equipment and supplies. (Nursery, farm and garden products, outdoor power equipment).

Grocery Stores (4451): establishments primarily engaged in retailing a general line of food products (canned/frozen food, fruits and vegetables, meat, fish, poultry, milk, bread, eggs, soda).

Specialty Food Stores (4452)**:** establishments primarily engaged in retailing specialized lines of food (meat, fish/seafood, fruits/vegetables, baked goods, candy, nuts, confections, popcorn, ice cream, items not made on the premises).

Beer, Wine, and Liquor Stores (4453): establishments primarily engaged in retailing packaged alcoholic beverages, such as ale, beer, wine and liquor.

Health & Personal Care Stores (4461): establishments primarily engaged in retailing health and personal care products (pharmacies/drug stores, first aid, beauty products, household supplies, candy, prepackaged snacks, optical goods, vitamins/supplements).

Clothing stores (4481): men's and boys' clothing stores; women's and girls' clothing stores; children's and infants' clothing stores; family clothing stores; clothing accessories stores.

Shoe Stores (4482): Shoes (men's, women's, child/infant, athletic).

Jewelry Stores (4483): Jewelry, luggage, and leather goods (silverware, watches, clocks, handbags, briefcases, belts, gloves).

Sporting Goods Stores (4511): establishments primarily engaged in retailing new sporting goods (fitness equipment, bikes, camping, uniforms and footwear).

Book & Music Stores (4512): establishments primarily engaged in retailing new books, newspapers, magazines, and prerecorded audio and video media.

Department Stores (4521): establishments known as department stores primarily engaged in retailing a wide range of the following new products with no one merchandise line predominating: apparel; furniture; appliances and home furnishings; and selected additional items, such as paint, hardware, toiletries, cosmetics, photographic equipment, jewelry, toys and sporting goods. Merchandise lines are normally arranged in separate departments.

General Merchandise Stores (4529): establishments primarily engaged in retailing new goods in general merchandise stores (except department stores) (warehouse clubs, supercenters, apparel, auto parts, dry goods, hardware, groceries, housewares, no line predominating).

Florists (4531): establishments known as florists primarily engaged in retailing cut flowers, floral arrangements, and potted plants purchased from others. These establishments usually prepare the arrangements they sell.

Office Supplies & Gift Stores (4532): establishments primarily engaged in one or more of the following: (1) retailing new stationery, school supplies, and office supplies; (2) retailing a combination of new office equipment, furniture, and supplies; (3) retailing new office equipment, furniture, and supplies in combination with retailing new computers; and (4) retailing new gifts, novelty merchandise, souvenirs, greeting cards, seasonal and holiday decorations and curios.

Miscellaneous Retailers (4539**):** establishments primarily engaged in retailing new miscellaneous specialty store merchandise (except motor vehicle and parts dealers; furniture and home furnishings stores; consumer-type electronics and appliance stores; building material and garden equipment and supplies dealers; food and beverage stores; health and personal care stores; gasoline stations; clothing and clothing accessories stores; sporting goods, hobby, book, and music stores; general merchandise stores; florists; office supplies, stationery, and gift stores; and used merchandise stores). Pet supplies, art dealers, manufactured home dealers, tobacco/cigar stores,

Restaurants
Full-Service Restaurants (7221): establishments primarily engaged in providing food services to patrons who order and are served while seated (i.e., waiter/waitress service) and pay after eating. Establishments that provide these types of food services to patrons with any combination of other services, such as carryout services are classified in this industry.

Limited-Service Restaurants (7222): establishments primarily engaged in providing food services where patrons generally order or select items and pay before eating. Most establishments do not have waiter/waitress service, but some provide limited service, such as cooking to order (i.e., per special request), bringing food to seated customers, or providing off-site delivery (cafeterias, snack/ juice bar, ice cream/soft serve shops, cookie shops, popcorn shops, donut shops, coffee shops, bagel shops).

Special Food Services (7223): establishments primarily engaged in providing one of the following food services (2) a location designated by the customer; or (3) from motorized vehicles or non-motorized carts.

- Food Service Contractors: Establishments may be engaged in providing food services at institutional, governmental, commercial, or industrial locations of others based (cafeteria, restaurant, and fast food eating-place) on contractual arrangements with these types of organizations for a specified period of time. Management staff is always provided by the food services contractor.

- Caterers: providing single event-based food services. These establishments generally have equipment and vehicles to transport meals and snacks to events and/or prepare food at an off-premise site. Banquet halls with catering staff are included in this industry. Examples of events catered by establishments in this industry are graduation parties, wedding receptions, business or retirement luncheons and trade shows.

- Mobile Food Services: establishments primarily engaged in preparing and serving meals and snacks for immediate consumption from motorized vehicles or non-motorized carts. The establishment is the central location from which the caterer route is serviced, not each vehicle, or cart. Included in this industry are establishments primarily engaged in providing food services from vehicles, such as hot dog carts and ice cream trucks.

Drinking Places (Alcoholic Beverages) (7224): establishments primarily engaged in preparing and serving alcoholic beverages for immediate consumption (bars, taverns, nightclubs).

Shopping Center Definitions
This study utilizes the shopping centers typologies defined by the International Council of Shopping Centers (ICSC) as follows:

- **Convenience Centers:** Convenience centers are 30,000 sf or less, unanchored, and generally will service a trade area of up to one mile. These centers include banking, carryout foods, florists, mail centers, small restaurants, small food markets, and professional services such as real estate and financial consulting. The centers typically include six to eight businesses.

- **Neighborhood Centers:** Neighborhood centers are anchored with a full-sized supermarket and typically range from 60,000 to 100,000 sf. They service a trade area of two to three miles and can include apparel, banks, carryout food, hardware, mail centers, restaurants, sporting goods and professional services such as financial consulting and real estate.

- **Community Centers:** Community centers typically range from 150,000 to 300,000 sf and are almost always anchored with a full-sized department store. They also include junior anchor retailers selling books, crafts, shoes, and sporting goods. Community centers often include large home improvement stores and medium-sized discount apparel stores. Their service area is typically five to seven miles in suburban locations.

- **Lifestyle Centers:** Lifestyle centers average 150,000 to 200,000 sf and feature popular apparel, book, and home furnishing stores, as well as cinemas and a wide selection of themed restaurants. The centers are frequently planned as walkable areas with main streets. Recently, lifestyle centers have included large anchors such as department stores, public libraries, and supermarkets. These centers typically have a trade area of four to six miles when developed in suburban settings. Lifestyle centers that include civic, employment, and residential buildings along with the retail land use are defined as 'town centers.'

- **Regional Centers:** Regional centers average trade areas of eight to 12 miles and are anchored with multiple department stores. The centers can range from 800,000 to 1,500,000 sf, and often include cinemas along with 200,000 sf of national brand fashion.

Limits of Study

The findings of this study represent GPG's best estimates for the amounts and types of retailers and restaurants that may be reasonably supportable in the North Side Historic District area of Bethlehem, Pennsylvania. Every reasonable effort has been made to ensure that the data contained in this study reflect the most accurate and timely information possible and are believed to be reliable. Information discussed by individuals and in focus groups have not been independently verified by GPG.

This study is based on estimates, assumptions, and other information developed by GPG independent research effort, general knowledge of the industry, and consultations with the client and its representatives. This study is designed as objective third-party research and GPG does not recommend that any or all of the supportable retail be developed in the study area.

No responsibility is assumed for inaccuracies in reporting by the client, its agent and representatives or in any other data source used in preparing or presenting this study. This report is based on information that was current as of December 19, 2019 and GPG has not undertaken any update of its research effort since such date.

This report may contain prospective financial information, estimates, or opinions that represent GPG's view of reasonable expectations at a particular time, but such information, estimates, or opinions are not offered as predictions or assurances that a particular level of income or profit will be achieved, that particular events will occur, or that a particular price will be offered or accepted. The actual amounts of supportable retail could be significantly higher or lower depending on multiple market and not market factors including the type, design and quality of the new development. It is plausible that a walkable town center, with well-designed buildings and public realm, could draw visitors from beyond this study's estimated trade area boundaries and considerably outperform the site's location and limited market potential. This would require an extraordinary development team and retailer mix unique to the market, including anchor retailers. On the other hand, a poorly implemented commercial center or badly managed businesses could underperform the location and the estimates of this study.

Actual results achieved during the period covered by our prospective financial analysis may vary from those described in our report, and the variations may be material. Therefore, no warranty or representation is made by GPG that any of the projected values or results contained in this study will be achieved. This study should not be the sole basis for programming, planning, designing, financing, or development of any commercial center.

END OF STUDY

Appendix A1: Primary Trade Area Business Summary

Gibbs Planning Group

Business Summary

North Primary Trade Area
Area: 36.13 square miles

Prepared by Esri

Data for all businesses in area				
Total Businesses:		4,565		
Total Employees:		80,524		
Total Residential Population:		122,200		
Employee/Residential Population Ratio (per 100 Residents)		66		

	Businesses		Employees	
by SIC Codes	Number	Percent	Number	Percent
Agriculture & Mining	59	1.3%	390	0.5%
Construction	269	5.9%	2,055	2.6%
Manufacturing	176	3.9%	4,922	6.1%
Transportation	101	2.2%	1,778	2.2%
Communication	41	0.9%	646	0.8%
Utility	19	0.4%	201	0.2%
Wholesale Trade	169	3.7%	4,438	5.5%
Retail Trade Summary	910	19.9%	8,466	10.5%
Home Improvement	39	0.9%	371	0.5%
General Merchandise Stores	26	0.6%	404	0.5%
Food Stores	93	2.0%	999	1.2%
Auto Dealers, Gas Stations, Auto Aftermarket	110	2.4%	748	0.9%
Apparel & Accessory Stores	49	1.1%	298	0.4%
Furniture & Home Furnishings	51	1.1%	265	0.3%
Eating & Drinking Places	319	7.0%	3,610	4.5%
Miscellaneous Retail	224	4.9%	1,771	2.2%
Finance, Insurance, Real Estate Summary	422	9.2%	3,623	4.5%
Banks, Savings & Lending Institutions	85	1.9%	722	0.9%
Securities Brokers	63	1.4%	470	0.6%
Insurance Carriers & Agents	98	2.1%	1,055	1.3%
Real Estate, Holding, Other Investment Offices	176	3.9%	1,376	1.7%
Services Summary	2,022	44.3%	51,654	64.1%
Hotels & Lodging	29	0.6%	2,415	3.0%
Automotive Services	154	3.4%	747	0.9%
Motion Pictures & Amusements	133	2.9%	1,257	1.6%
Health Services	345	7.6%	19,362	24.0%
Legal Services	73	1.6%	383	0.5%
Education Institutions & Libraries	136	3.0%	7,535	9.4%
Other Services	1,154	25.3%	19,956	24.8%
Government	111	2.4%	2,164	2.7%
Unclassified Establishments	265	5.8%	186	0.2%
Totals	4,565	100.0%	80,524	100.0%

Date Note : Data on the Business Summary report is calculated **Esri's Data** which uses census block groups to allocate business summary data to custom

Appendix A2: Primary Trade Area Business Summary

Gibbs Planning Group

Business Summary

North Primary Trade Area
Area: 36.13 square miles

Prepared by Esri

by NAICS Codes	Businesses Number	Businesses Percent	Employees Number	Employees Percent
Agriculture, Forestry, Fishing & Hunting	6	0.1%	25	0.0%
Mining	2	0.0%	8	0.0%
Utilities	8	0.2%	110	0.1%
Construction	297	6.5%	2,280	2.8%
Manufacturing	189	4.1%	5,090	6.3%
Wholesale Trade	164	3.6%	4,405	5.5%
Retail Trade	567	12.4%	4,617	5.7%
Motor Vehicle & Parts Dealers	93	2.0%	656	0.8%
Furniture & Home Furnishings Stores	25	0.5%	129	0.2%
Electronics & Appliance Stores	19	0.4%	64	0.1%
Bldg Material & Garden Equipment & Supplies Dealers	39	0.9%	371	0.5%
Food & Beverage Stores	74	1.6%	819	1.0%
Health & Personal Care Stores	67	1.5%	734	0.9%
Gasoline Stations	18	0.4%	92	0.1%
Clothing & Clothing Accessories Stores	63	1.4%	344	0.4%
Sport Goods, Hobby, Book, & Music Stores	33	0.7%	275	0.3%
General Merchandise Stores	26	0.6%	404	0.5%
Miscellaneous Store Retailers	93	2.0%	575	0.7%
Nonstore Retailers	19	0.4%	154	0.2%
Transportation & Warehousing	81	1.8%	1,536	1.9%
Information	91	2.0%	1,136	1.4%
Finance & Insurance	252	5.5%	2,290	2.8%
Central Bank/Credit Intermediation & Related Activities	84	1.8%	717	0.9%
Securities, Commodity Contracts & Other Financial	69	1.5%	489	0.6%
Insurance Carriers & Related Activities; Funds, Trusts & Other	99	2.2%	1,084	1.3%
Real Estate, Rental & Leasing	194	4.2%	1,344	1.7%
Professional, Scientific & Tech Services	371	8.1%	13,199	16.4%
Legal Services	88	1.9%	433	0.5%
Management of Companies & Enterprises	8	0.2%	58	0.1%
Administrative & Support & Waste Management & Remediation	170	3.7%	2,278	2.8%
Educational Services	159	3.5%	7,687	9.5%
Health Care & Social Assistance	491	10.8%	21,292	26.4%
Arts, Entertainment & Recreation	103	2.3%	1,130	1.4%
Accommodation & Food Services	358	7.8%	6,145	7.6%
Accommodation	29	0.6%	2,415	3.0%
Food Services & Drinking Places	329	7.2%	3,731	4.6%
Other Services (except Public Administration)	678	14.9%	3,543	4.4%
Automotive Repair & Maintenance	122	2.7%	479	0.6%
Public Administration	111	2.4%	2,164	2.7%
Unclassified Establishments	265	5.8%	186	0.2%
Total	4,565	100.0%	80,524	100.0%

Date Note: Data on the Business Summary report is calculated **Esri's Data** which uses census block groups to allocate business summary data to custom

Appendix B1: Primary Trade Area Community Profile

Gibbs Planning Group

Community Profile

North Primary Trade Area
Area: 36.13 square miles

Prepared by Esri

Population Summary	
2000 Total Population	111,959
2010 Total Population	117,702
2019 Total Population	122,200
2019 Group Quarters	7,190
2024 Total Population	124,092
2019-2024 Annual Rate	0.31%
2019 Total Daytime Population	148,685
Workers	85,030
Residents	63,655
Household Summary	
2000 Households	43,985
2000 Average Household Size	2.40
2010 Households	45,840
2010 Average Household Size	2.42
2019 Households	47,292
2019 Average Household Size	2.43
2024 Households	47,965
2024 Average Household Size	2.44
2019-2024 Annual Rate	0.28%
2010 Families	28,453
2010 Average Family Size	3.01
2019 Families	28,845
2019 Average Family Size	3.04
2024 Families	29,065
2024 Average Family Size	3.05
2019-2024 Annual Rate	0.15%
Housing Unit Summary	
2000 Housing Units	46,368
Owner Occupied Housing Units	60.2%
Renter Occupied Housing Units	34.7%
Vacant Housing Units	5.1%
2010 Housing Units	48,657
Owner Occupied Housing Units	56.9%
Renter Occupied Housing Units	37.3%
Vacant Housing Units	5.8%
2019 Housing Units	50,328
Owner Occupied Housing Units	54.5%
Renter Occupied Housing Units	39.5%
Vacant Housing Units	6.0%
2024 Housing Units	51,174
Owner Occupied Housing Units	54.1%
Renter Occupied Housing Units	39.7%
Vacant Housing Units	6.3%
Median Household Income	
2019	$53,439
2024	$59,474
Median Home Value	
2019	$190,774
2024	$202,654
Per Capita Income	
2019	$29,900
2024	$33,741
Median Age	
2010	37.9
2019	39.5
2024	40.4

Data Note: Household population includes persons not residing in group quarters. Average Household Size is the household population divided by total households. Persons in families include the householder and persons related to the householder by birth, marriage, or adoption. Per Capita Income represents the income received by all persons aged 15 years and over divided by the total population.

Source: U.S. Census Bureau, Census 2010 Summary File 1 Esri forecasts for 2019 and 2024 Esri converted Census 2000 data into 2010 geography.

Appendix B2: Primary Trade Area Community Profile

Gibbs Planning Group

Community Profile

North Primary Trade Area
Area: 36.13 square miles

Prepared by Esri

2019 Households by Income	
Household Income Base	47,292
<$15,000	12.3%
$15,000 - $24,999	10.8%
$25,000 - $34,999	10.0%
$35,000 - $49,999	13.3%
$50,000 - $74,999	18.4%
$75,000 - $99,999	12.6%
$100,000 - $149,999	12.9%
$150,000 - $199,999	4.7%
$200,000+	5.0%
Average Household Income	$75,201
2024 Households by Income	
Household Income Base	47,965
<$15,000	10.7%
$15,000 - $24,999	9.3%
$25,000 - $34,999	8.9%
$35,000 - $49,999	12.4%
$50,000 - $74,999	18.5%
$75,000 - $99,999	13.3%
$100,000 - $149,999	15.1%
$150,000 - $199,999	6.2%
$200,000+	5.7%
Average Household Income	$85,264
2019 Owner Occupied Housing Units by Value	
Total	27,418
<$50,000	2.2%
$50,000 - $99,999	7.9%
$100,000 - $149,999	19.0%
$150,000 - $199,999	25.7%
$200,000 - $249,999	17.4%
$250,000 - $299,999	11.2%
$300,000 - $399,999	10.8%
$400,000 - $499,999	3.5%
$500,000 - $749,999	2.0%
$750,000 - $999,999	0.2%
$1,000,000 - $1,499,999	0.1%
$1,500,000 - $1,999,999	0.0%
$2,000,000 +	0.1%
Average Home Value	$216,246
2024 Owner Occupied Housing Units by Value	
Total	27,658
<$50,000	1.2%
$50,000 - $99,999	6.0%
$100,000 - $149,999	17.0%
$150,000 - $199,999	24.7%
$200,000 - $249,999	18.0%
$250,000 - $299,999	12.4%
$300,000 - $399,999	12.6%
$400,000 - $499,999	4.5%
$500,000 - $749,999	2.8%
$750,000 - $999,999	0.3%
$1,000,000 - $1,499,999	0.1%
$1,500,000 - $1,999,999	0.0%
$2,000,000 +	0.1%
Average Home Value	$233,528

Data Note: Income represents the preceding year, expressed in current dollars. Household income includes wage and salary earnings, interest dividends, net rents, pensions, SSI and welfare payments, child support, and alimony.

Source: U.S. Census Bureau, Census 2010 Summary File 1 Esri forecasts for 2019 and 2024 Esri converted Census 2000 data into 2010 geography.

Appendix B3: Primary Trade Area Community Profile

Gibbs Planning Group

Community Profile

North Primary Trade Area
Area: 36.13 square miles

Prepared by Esri

2010 Population by Age	
Total	117,700
0 - 4	5.6%
5 - 9	5.6%
10 - 14	5.9%
15 - 24	16.5%
25 - 34	12.9%
35 - 44	11.9%
45 - 54	13.7%
55 - 64	11.6%
65 - 74	7.1%
75 - 84	5.9%
85 +	3.2%
18 +	79.0%
2019 Population by Age	
Total	122,201
0 - 4	5.2%
5 - 9	5.2%
10 - 14	5.5%
15 - 24	15.6%
25 - 34	13.0%
35 - 44	11.7%
45 - 54	11.7%
55 - 64	12.9%
65 - 74	9.8%
75 - 84	5.7%
85 +	3.6%
18 +	80.8%
2024 Population by Age	
Total	124,089
0 - 4	5.2%
5 - 9	5.1%
10 - 14	5.3%
15 - 24	15.0%
25 - 34	13.0%
35 - 44	12.1%
45 - 54	11.3%
55 - 64	12.1%
65 - 74	10.7%
75 - 84	6.8%
85 +	3.4%
18 +	81.1%
2010 Population by Sex	
Males	56,805
Females	60,897
2019 Population by Sex	
Males	59,346
Females	62,855
2024 Population by Sex	
Males	60,463
Females	63,629

Source: U.S. Census Bureau, Census 2010 Summary File 1. Esri forecasts for 2019 and 2024. Esri converted Census 2000 data into 2010 geography.

Appendix B4: Primary Trade Area Community Profile

Gibbs Planning Group

Community Profile

North Primary Trade Area
Area: 36.13 square miles

Prepared by Esri

2010 Population by Race/Ethnicity	
Total	117,703
White Alone	77.1%
Black Alone	6.9%
American Indian Alone	0.3%
Asian Alone	2.7%
Pacific Islander Alone	0.1%
Some Other Race Alone	9.5%
Two or More Races	3.4%
Hispanic Origin	22.9%
Diversity Index	61.1
2019 Population by Race/Ethnicity	
Total	122,201
White Alone	70.1%
Black Alone	8.6%
American Indian Alone	0.4%
Asian Alone	3.1%
Pacific Islander Alone	0.1%
Some Other Race Alone	13.3%
Two or More Races	4.3%
Hispanic Origin	31.2%
Diversity Index	71.4
2024 Population by Race/Ethnicity	
Total	124,093
White Alone	65.9%
Black Alone	9.7%
American Indian Alone	0.5%
Asian Alone	3.4%
Pacific Islander Alone	0.1%
Some Other Race Alone	15.5%
Two or More Races	4.9%
Hispanic Origin	36.4%
Diversity Index	76.1
2010 Population by Relationship and Household Type	
Total	117,702
In Households	94.2%
In Family Households	75.2%
Householder	24.2%
Spouse	16.7%
Child	28.3%
Other relative	3.5%
Nonrelative	2.4%
In Nonfamily Households	19.0%
In Group Quarters	5.8%
Institutionalized Population	1.2%
Noninstitutionalized Population	4.6%

Data Note: Persons of Hispanic Origin may be of any race. The Diversity Index measures the probability that two people from the same area will be from different race/ethnic groups.
Source: U.S. Census Bureau, Census 2010 Summary File 1. Esri forecasts for 2019 and 2024 Esri converted Census 2000 data into 2010 geography.

Appendix B5: Primary Trade Area Community Profile

Gibbs Planning Group

Community Profile

North Primary Trade Area
Area: 36.13 square miles

Prepared by Esri

2019 Population 25+ by Educational Attainment	
Total	83,693
Less than 9th Grade	4.3%
9th - 12th Grade, No Diploma	6.9%
High School Graduate	28.8%
GED/Alternative Credential	4.4%
Some College, No Degree	17.7%
Associate Degree	9.0%
Bachelor's Degree	17.8%
Graduate/Professional Degree	11.2%
2019 Population 15+ by Marital Status	
Total	102,816
Never Married	40.3%
Married	42.6%
Widowed	6.6%
Divorced	10.5%
2019 Civilian Population 16+ in Labor Force	
Civilian Employed	96.2%
Civilian Unemployed (Unemployment Rate)	3.8%
2019 Employed Population 16+ by Industry	
Total	59,367
Agriculture/Mining	0.2%
Construction	4.9%
Manufacturing	11.9%
Wholesale Trade	2.6%
Retail Trade	10.4%
Transportation/Utilities	7.4%
Information	2.1%
Finance/Insurance/Real Estate	5.3%
Services	52.8%
Public Administration	2.4%
2019 Employed Population 16+ by Occupation	
Total	59,369
White Collar	59.3%
Management/Business/Financial	12.0%
Professional	22.5%
Sales	10.3%
Administrative Support	14.6%
Services	19.7%
Blue Collar	21.0%
Farming/Forestry/Fishing	0.1%
Construction/Extraction	3.3%
Installation/Maintenance/Repair	3.1%
Production	6.7%
Transportation/Material Moving	7.9%
2010 Population By Urban/ Rural Status	
Total Population	117,702
Population Inside Urbanized Area	99.9%
Population Inside Urbanized Cluster	0.0%
Rural Population	0.1%

Source: U.S. Census Bureau, Census 2010 Summary File 1. Esri forecasts for 2019 and 2024 Esri converted Census 2000 data into 2010 geography.

Appendix B6: Primary Trade Area Community Profile

Gibbs Planning Group

Community Profile

North Primary Trade Area
Area: 36.13 square miles

Prepared by Esri

2010 Households by Type	
Total	45,840
Households with 1 Person	30.4%
Households with 2+ People	69.6%
Family Households	62.1%
Husband-wife Families	43.0%
With Related Children	16.7%
Other Family (No Spouse Present)	19.1%
Other Family with Male Householder	4.8%
With Related Children	2.7%
Other Family with Female Householder	14.3%
With Related Children	9.6%
Nonfamily Households	7.6%
All Households with Children	29.4%
Multigenerational Households	4.1%
Unmarried Partner Households	7.7%
Male-female	7.0%
Same-sex	0.7%
2010 Households by Size	
Total	45,841
1 Person Household	30.4%
2 Person Household	32.6%
3 Person Household	16.0%
4 Person Household	12.2%
5 Person Household	5.5%
6 Person Household	2.1%
7 + Person Household	1.2%
2010 Households by Tenure and Mortgage Status	
Total	45,840
Owner Occupied	60.4%
Owned with a Mortgage/Loan	41.1%
Owned Free and Clear	19.2%
Renter Occupied	39.6%
2010 Housing Units By Urban/ Rural Status	
Total Housing Units	48,657
Housing Units Inside Urbanized Area	99.9%
Housing Units Inside Urbanized Cluster	0.0%
Rural Housing Units	0.1%

Data Note: Households with children include any households with people under age 18, related or not. Multigenerational households are families with 3 or more parent-child relationships. Unmarried partner households are usually classified as nonfamily households unless there is another member of the household related to the householder. Multigenerational and unmarried partner households are reported only to the tract level. Esri estimated block group data, which is used to estimate polygons or non-standard geography.

Source: U.S. Census Bureau, Census 2010 Summary File 1. Esri forecasts for 2019 and 2024 Esri converted Census 2000 data into 2010 geography.

Appendix B7: Primary Trade Area Community Profile

Gibbs Planning Group

Community Profile

North Primary Trade Area
Area: 36.13 square miles

Prepared by Esri

Top 3 Tapestry Segments	
1.	Parks and Rec (5C)
2.	Front Porches (8E)
3.	Fresh Ambitions (13D)
2019 Consumer Spending	
Apparel & Services: Total $	$87,270,589
Average Spent	$1,845.36
Spending Potential Index	86
Education: Total $	$66,569,206
Average Spent	$1,407.62
Spending Potential Index	88
Entertainment/Recreation: Total $	$132,215,738
Average Spent	$2,795.73
Spending Potential Index	86
Food at Home: Total $	$212,539,196
Average Spent	$4,494.19
Spending Potential Index	87
Food Away from Home: Total $	$147,965,138
Average Spent	$3,128.76
Spending Potential Index	85
Health Care: Total $	$239,583,924
Average Spent	$5,066.06
Spending Potential Index	85
HH Furnishings & Equipment: Total $	$86,243,891
Average Spent	$1,823.65
Spending Potential Index	86
Personal Care Products & Services: Total $	$35,655,620
Average Spent	$753.95
Spending Potential Index	85
Shelter: Total $	$777,283,061
Average Spent	$16,435.83
Spending Potential Index	89
Support Payments/Cash Contributions/Gifts in Kind: Total $	$100,869,540
Average Spent	$2,132.91
Spending Potential Index	86
Travel: Total $	$91,169,716
Average Spent	$1,927.80
Spending Potential Index	86
Vehicle Maintenance & Repairs: Total $	$47,732,387
Average Spent	$1,009.31
Spending Potential Index	88

Data Note: Consumer spending shows the amount spent on a variety of goods and services by households that reside in the area. Expenditures are shown by broad budget categories that are not mutually exclusive. Consumer spending does not equal business revenue. Total and Average Amount Spent Per Household represent annual figures. The Spending Potential Index represents the amount spent in the area relative to a national average of 100.

Source: Consumer Spending data are derived from the 2016 and 2017 Consumer Expenditure Surveys, Bureau of Labor Statistics. Esri.
Source: U.S. Census Bureau, Census 2010 Summary File 1. Esri forecasts for 2019 and 2024 Esri converted Census 2000 data into 2010 geography.

Appendix C1: Primary Trade Area Dominant Tapestry Descriptions

Gibbs Planning Group

Tapestry Segmentation Area Profile

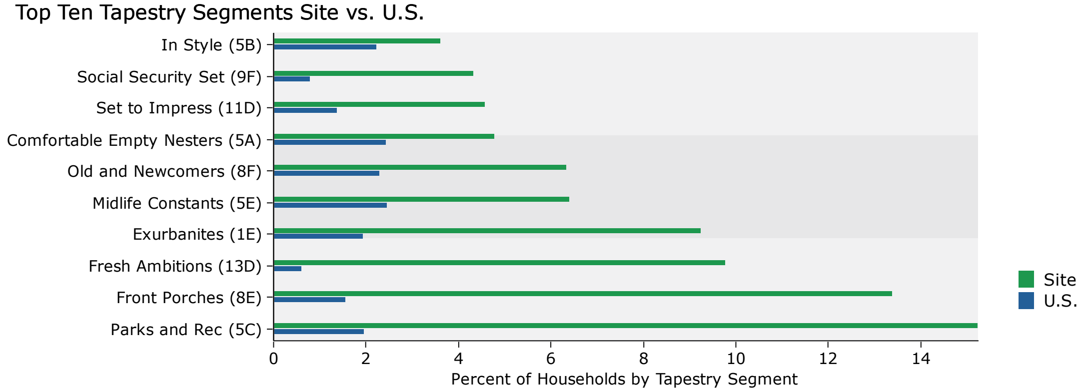
North Primary Trade Area
Area: 36.13 square miles

Prepared by Esri

Top Twenty Tapestry

		2019 Households		2019 U.S. Households		
			Cumulativ		Cumulativ	
Rank	**Tapestry Segment**	**Percent**	**Percent**	**Percent**	**Percent**	**Index**
1	Parks and Rec (5C)	15.2%	15.2%	2.0%	2.0%	774
2	Front Porches (8E)	13.4%	28.6%	1.6%	3.6%	850
3	Fresh Ambitions (13D)	9.8%	38.4%	0.6%	4.2%	1,548
4	Exurbanites (1E)	9.3%	47.7%	1.9%	6.1%	476
5	Midlife Constants (5E)	6.4%	54.1%	2.5%	8.6%	259
	Subtotal	**54.1%**		**8.6%**		
6	Old and Newcomers (8F)	6.3%	60.4%	2.3%	10.9%	275
7	Comfortable Empty Nesters (5A)	4.8%	65.2%	2.4%	13.3%	195
8	Set to Impress (11D)	4.6%	69.8%	1.4%	14.7%	331
9	Social Security Set (9F)	4.3%	74.1%	0.8%	15.5%	534
10	In Style (5B)	3.6%	77.7%	2.2%	17.7%	162
	Subtotal	**23.6%**		**9.1%**		
11	Savvy Suburbanites (1D)	2.9%	80.6%	3.0%	20.7%	97
12	College Towns (14B)	2.8%	83.4%	1.0%	21.7%	290
13	Small Town Simplicity (12C)	2.0%	85.4%	1.8%	23.5%	110
14	Retirement Communities (9E)	2.0%	87.4%	1.2%	24.7%	166
15	Emerald City (8B)	1.8%	89.2%	1.4%	26.1%	124
	Subtotal	**11.5%**		**8.4%**		
16	Bright Young Professionals (8C)	1.5%	90.7%	2.3%	28.4%	68
17	Barrios Urbanos (7D)	1.2%	91.9%	1.0%	29.4%	117
18	Up and Coming Families (7A)	1.2%	93.1%	2.5%	31.9%	47
19	Golden Years (9B)	1.0%	94.1%	1.3%	33.2%	77
20	Rustbelt Traditions (5D)	1.0%	95.1%	2.2%	35.4%	45
	Subtotal	**5.9%**		**9.3%**		
	Total	**95.1%**		**35.5%**		**268**

Top Ten Tapestry Segments Site vs. U.S.



Data Note: This report identifies neighborhood segments in the area, and describes the socioeconomic quality of the immediate neighborhood. The index is a comparison of the percent of households or Total Population 18+ in the area, by Tapestry segment, to the percent of households or Total Population 18+ in the United States, by segment. An index of 100 is the US average.
Source: Esri