

Veneta Retail Analysis

Using Free Data Effectively

Tom Hogue, DLCD Economic Development Specialist

Customers First

- Who is in your market
 - Demographics
- Lifestyle and spending habits
 - Customer Segmentation



Psychographic Mapping

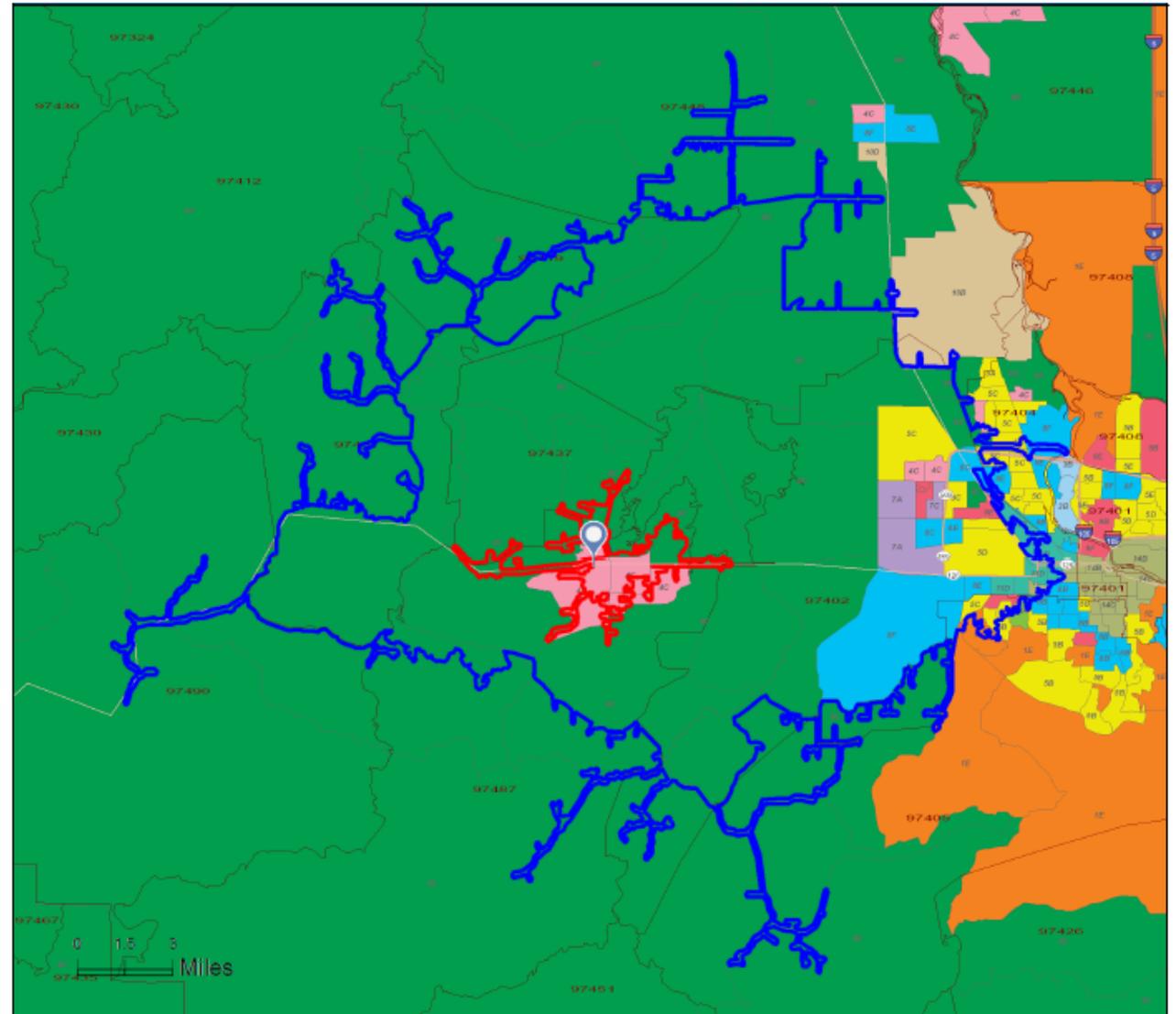
Psychographics are kind of like demographics. Psychographic information might be your **buyer's habits, hobbies, spending habits and values.** Demographics explain “who” your buyer is, while psychographics explain “why” they buy. Demographic information includes gender, age, income, marital status – the dry facts.



Dominant Tapestry Map

Veneta City drivetime
88184 8th St, Veneta, Oregon, 97487
Drive Time Bands: 0-5, 5-20 minute radii

DLCD Economic Development:
Latitude: 44.05130
Longitude: -123.36050



Psychographic ranking



Tapestry Segmentation Area Profile

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Top Twenty Tapestry Segments

Rank	Tapestry Segment	2015 Households		2015 U.S. Households		Index
		Percent	Cumulative Percent	Percent	Cumulative Percent	
1	Middleburg (4C)	81.6%	81.6%	2.8%	2.8%	2901
2	The Great Outdoors (6C)	18.4%	100.0%	1.6%	4.4%	1,181
Subtotal		100.0%		4.4%		

Psychographic ranking



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		Percent	Cumulative Percent	Percent	Cumulative Percent	
1	The Great Outdoors (6C)	18.8%	18.8%	1.6%	1.6%	1208
2	Set to Impress (11D)	12.4%	31.2%	1.4%	3.0%	893
3	Parks and Rec (5C)	10.8%	42.0%	2.0%	5.0%	540
4	Bright Young Professionals (8C)	9.2%	51.2%	2.2%	7.2%	413
5	Middleburg (4C)	7.3%	58.5%	2.8%	10.0%	261
	Subtotal	58.5%		10.0%		
6	Retirement Communities (9E)	6.9%	65.4%	1.2%	11.2%	568
7	Up and Coming Families (7A)	6.7%	72.1%	2.2%	13.4%	297
8	Front Porches (8E)	4.8%	76.9%	1.6%	15.0%	302
9	Senior Escapes (9D)	3.9%	80.8%	0.9%	15.9%	432
10	In Style (5B)	3.0%	83.8%	2.3%	18.2%	132
	Subtotal	25.3%		8.2%		
11	American Dreamers (7C)	2.9%	86.7%	1.5%	19.7%	200
12	Old and Newcomers (8F)	2.7%	89.4%	2.3%	22.0%	116
13	College Towns (14B)	2.7%	92.1%	0.9%	22.9%	283
14	Heartland Communities (6F)	2.6%	94.7%	2.4%	25.3%	110
15	Rustbelt Traditions (5D)	2.3%	97.0%	2.2%	27.5%	101
	Subtotal	13.2%		9.3%		
16	Green Acres (6A)	1.4%	98.4%	3.2%	30.7%	43
17	Exurbanites (1E)	0.9%	99.3%	1.9%	32.6%	49
18	Emerald City (8B)	0.3%	99.6%	1.4%	34.0%	19
19	Home Improvement (4B)	0.2%	99.8%	1.7%	35.7%	12
20	Comfortable Empty Nesters (5A)	0.1%	99.9%	2.5%	38.2%	5
	Subtotal	2.9%		10.7%		
	Total	100.0%		38.3%		261

Snapshot of Veneta Customers




LifeMode Group: Family Landscapes
Middleburg 4C

Households: 3,319,000
 Average Household Size: 2.73
 Median Age: 35.3
 Median Household Income: \$55,000

WHO ARE WE?

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

OUR NEIGHBORHOOD

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

SOCIOECONOMIC TRAITS

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

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





LifeMode Group: Cozy Country Living
The Great Outdoors 6C

Households: 1,850,000
 Average Household Size: 2.43
 Median Age: 46.3
 Median Household Income: \$53,000

WHO ARE WE?

These neighborhoods are found in pastoral settings throughout the United States. Consumers are educated empty nesters living an active but modest lifestyle. Their focus is land. They are more likely to invest in real estate or a vacation home than stocks. They are active gardeners and partial to homegrown and home-cooked meals. Although retirement beckons, most of these residents still work, with incomes slightly above the US level.

OUR NEIGHBORHOOD

- Over 55% of households are married-couple families; 36% are couples with no children living at home.
- Average household size is slightly smaller at 2.43.
- Typical of areas with rustic appeal, the housing inventory features single-family homes (76%) and mobile homes (16%); a significant inventory of seasonal housing is available (Index 398).
- Residents live in small towns and rural communities throughout the West, South, and Northeast regions of the country.
- More than half of all homes were constructed between 1970 and 2000.
- Most households have one or two vehicles; average travel time to work is slightly higher (28 minutes) despite a disproportionate number that work from home (Index 155).

SOCIOECONOMIC TRAITS

- Nearly 60% have attended college or hold a degree.
- Unemployment is lower at 8% (Index 88), but so is labor force participation at 60%.
- Typical of neighborhoods with older residents, income from retirement and Social Security is common, but residents also derive income from self-employment and investments.
- Residents are very do-it-yourself oriented and cost conscious.
- Many service their own autos, work on home improvement and remodeling projects, and maintain their own yards.
- They prefer domestic travel to trips abroad.

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4C

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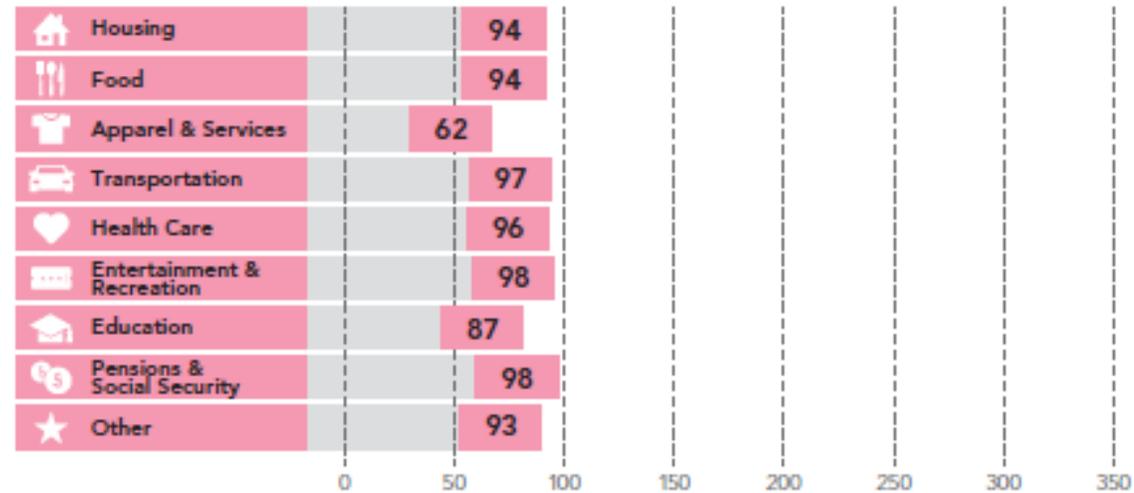


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Middleburg

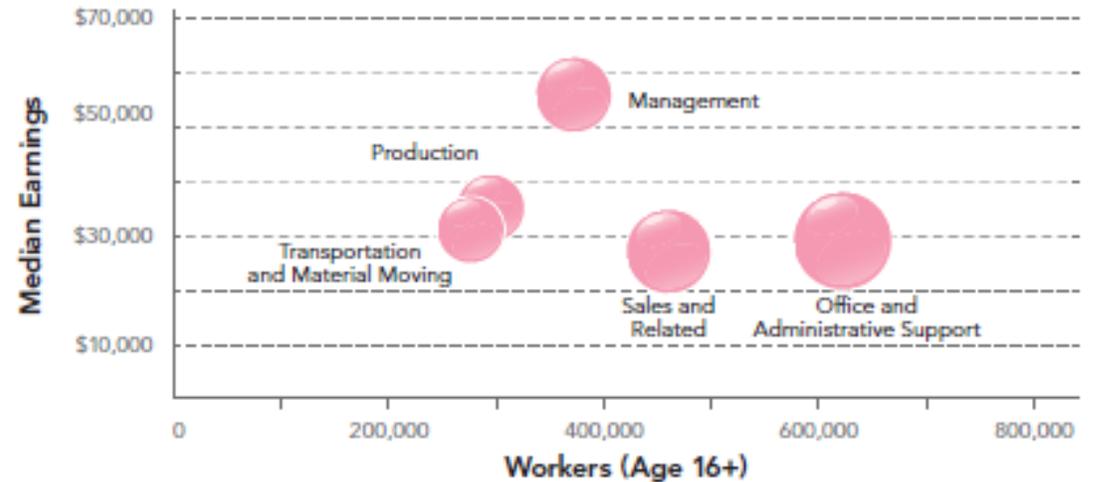
AVERAGE HOUSEHOLD BUDGET INDEX

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



OCCUPATION BY EARNINGS

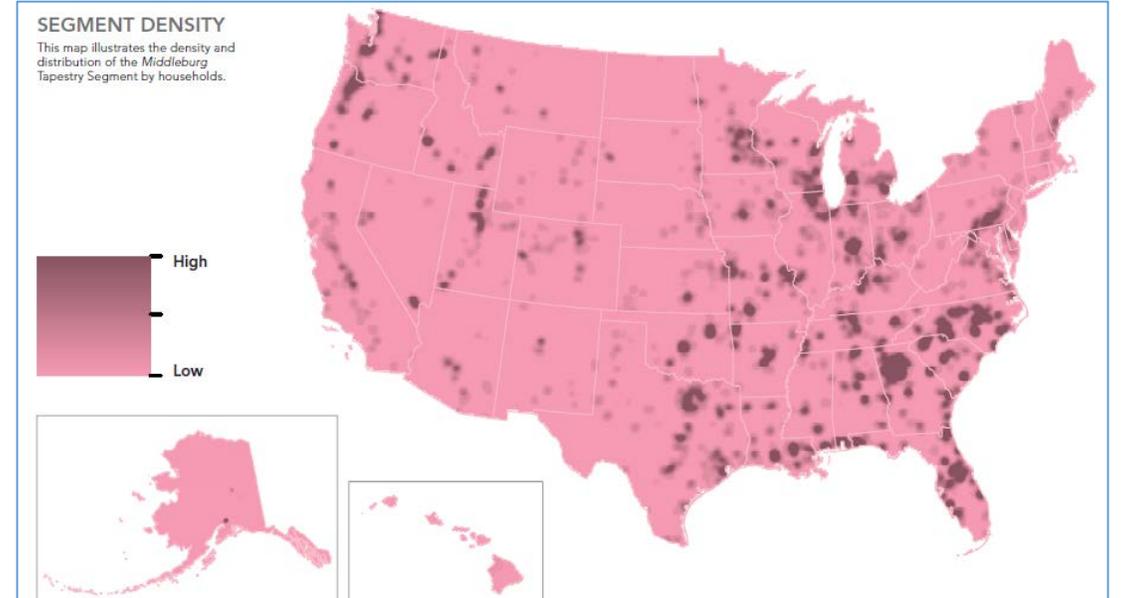
The five occupations with the highest number of workers in the market are displayed by median earnings. Data from the Census Bureau's American Community Survey.



Middleburg

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

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





LifeMode Group: Cozy Country Living

The Great Outdoors



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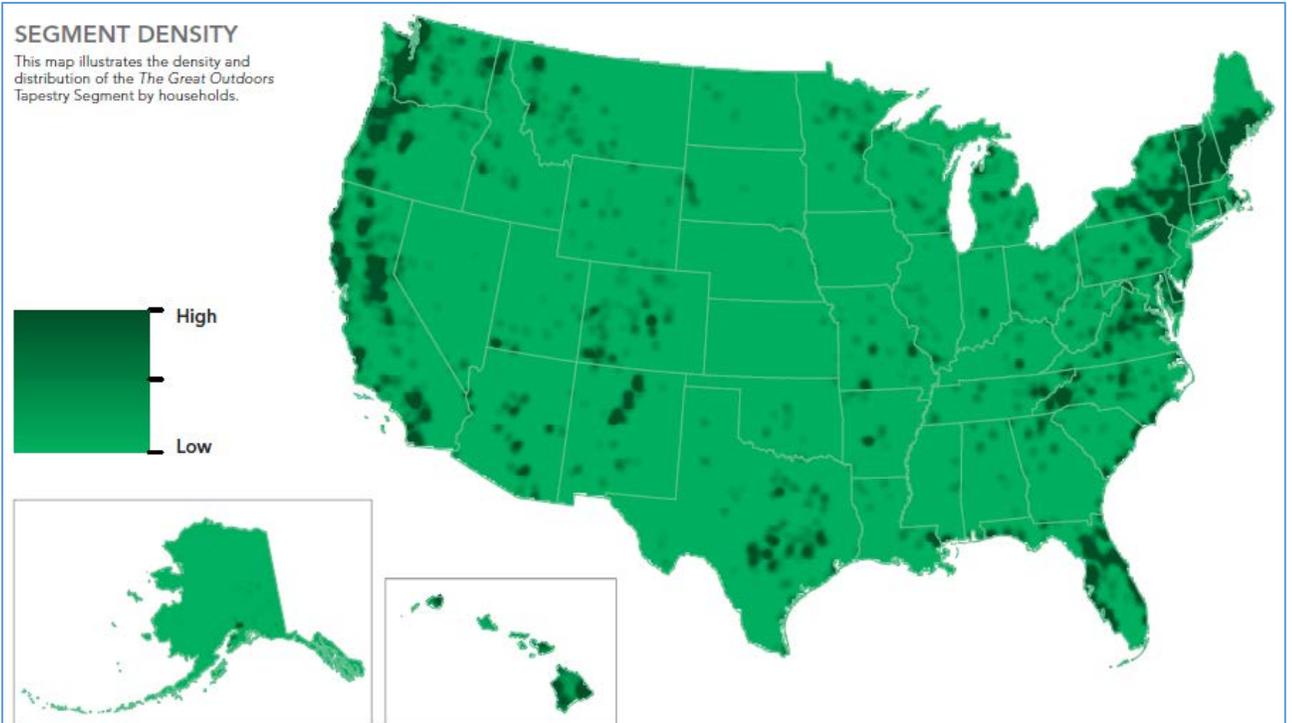
The Great Outdoors

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

- Satellite dishes and riding lawn mowers are familiar sights in these rural settings, along with multiple vehicles; four-wheel drive trucks are popular, too.
- Residents are members of AARP and veterans' clubs and support various civic causes.
- Technology is not central in their lives: light use of Internet connectivity for shopping and entertainment.
- Most households have pets—dogs or cats.
- Television channels such as CMT, History, and Fox News are popular.
- They enjoy outdoor activities such as hiking, hunting, fishing, and boating.

SEGMENT DENSITY

This map illustrates the density and distribution of the *The Great Outdoors* Tapestry Segment by households.





LifeMode Group: Midtown Singles
Set to Impress

11D

Households: 1,657,000

Average Household Size: 2.10

Median Age: 33.1

Median Household Income: \$29,000

WHO ARE WE?

Set to Impress is depicted by medium to large multiunit apartments with lower than average rents. These apartments are often nestled into neighborhoods with other businesses or single-family housing. Nearly one in three residents is 20 to 34 years old, and over half of the homes are nonfamily households. Although many residents live alone, they preserve close connections with their family. Income levels are low; many work in food service while they are attending college. This group is always looking for a deal. They are very conscious of their image and seek to bolster their status with the latest fashion. *Set to Impress* residents are tapped into popular music and the local music scene.

OUR NEIGHBORHOOD

- Apartment complexes represented by multiple multiunit structures are often nestled in neighborhoods with either single-family homes or other businesses.
- Renters make up nearly three quarters of all households.
- They're found mostly in urban areas, but also in suburbs.
- Single-person households make up over 40% of all households.
- It is easy enough to walk or bike to work for many residents.

SOCIOECONOMIC TRAITS

- Residents are better educated and mobile.
- Unemployment is higher, although many are still enrolled in college (Index 146).
- They always have an eye out for a sale and will stock up when the price is right.
- They prefer name brands, but will buy generic when it is a better deal.
- Quick meals on the run are a reality of life.
- They're image-conscious consumers that dress to impress and often make impulse buys.
- They maintain close relationships with family.

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

- They listen to a variety of the latest music and download music online.
- Majority have cell phones only, no landlines.
- They use the Internet for social media and managing finances.
- They own used, imported vehicles.
- They shop at Walgreens.
- They enjoy leisure activities including going to rock concerts, night clubs, and the zoo.



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



LifeMode Group: GenXurban
Parks and Rec

5C

Households: 2,411,000

Average Household Size: 2.49

Median Age: 40.3

Median Household Income: \$55,000

WHO ARE WE?

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

OUR NEIGHBORHOOD

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

SOCIOECONOMIC TRAITS

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

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

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

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



Lots of numbers



Disposable Income Profile

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	Census 2010	2015	2020	2015-2020 Change	2015-2020 Annual Rate
Population	4,794	4,936	5,081	145	0.58%
Median Age	39.1	39.6	39.9	0.3	0.15%
Households	1,810	1,886	1,951	65	0.68%
Average Household Size	2.63	2.60	2.59	-0.01	-0.08%

2015 Households by Disposable Income	Number	Percent
Total	1,886	100.0%
<\$15,000	230	12.2%
\$15,000-\$24,999	248	13.1%
\$25,000-\$34,999	305	16.2%
\$35,000-\$49,999	428	22.7%
\$50,000-\$74,999	446	23.6%
\$75,000-\$99,999	130	6.9%
\$100,000-\$149,999	77	4.1%
\$150,000-\$199,999	14	0.7%
\$200,000+	8	0.4%
Median Disposable Income	\$39,220	
Average Disposable Income	\$46,583	

Lots of numbers



Retail Goods and Services Expenditures

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Top Tapestry Segments	Percent	Demographic Summary	2015	2020
Middleburg (4C)	81.6%	Population	4,936	5,081
The Great Outdoors (6C)	18.4%	Households	1,886	1,951
Top Tier (1A)	0.0%	Families	1,364	1,404
Professional Pride (1B)	0.0%	Median Age	39.6	39.9
Boomburbs (1C)	0.0%	Median Household Income	\$48,759	\$53,846
		Spending Potential Index	Average Amount Spent	Total
Apparel and Services				
		79	\$1,822.37	\$3,436,991
Men's		78	\$336.28	\$634,220
Women's		79	\$637.86	\$1,203,000
Children's		79	\$297.08	\$560,288
Footwear		78	\$356.47	\$672,305
Watches & Jewelry		82	\$118.86	\$224,161
Apparel Products and Services (1)		78	\$75.83	\$143,017
Computer				
Computers and Hardware for Home Use		79	\$170.95	\$322,419
Portable Memory		79	\$4.26	\$8,039
Computer Software		76	\$15.45	\$29,134
Computer Accessories		79	\$15.14	\$28,557
Entertainment & Recreation				
Fees and Admissions		80	\$2,649.75	\$4,997,427
Membership Fees for Clubs (2)		79	\$505.11	\$952,644
Fees for Participant Sports, excl. Trips		79	\$135.50	\$255,559
Fees for Participant Sports, excl. Trips		82	\$98.35	\$185,483
Admission to Movie/Theatre/Opera/Ballet		77	\$126.26	\$238,119
Admission to Sporting Events, excl. Trips		80	\$53.45	\$100,798
Fees for Recreational Lessons		74	\$91.17	\$171,945
Dating Services		65	\$0.39	\$742
TV/Video/Audio		80	\$1,048.19	\$1,976,883
Cable and Satellite Television Services		80	\$718.59	\$1,355,257
Televisions		81	\$119.94	\$226,208
Satellite Dishes		82	\$1.28	\$2,419
VCRs, Video Cameras, and DVD Players		78	\$8.60	\$16,711

Retail leakage

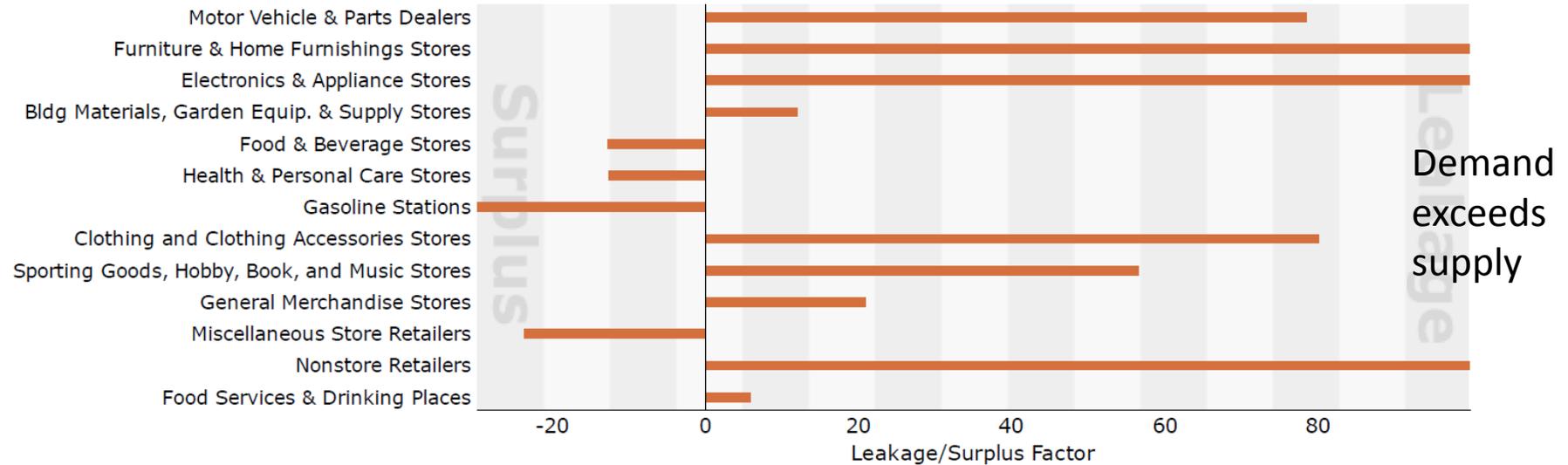


Retail MarketPlace Profile

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Leakage/Surplus Factor by Industry Subsector



Retail leakage



Retail MarketPlace Profile

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Summary Demographics						
2015 Population						58,879
2015 Households						23,913
2015 Median Disposable Income						\$36,415
2015 Per Capita Income						\$23,067
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	\$742,453,455	\$951,979,426	-\$209,525,971	-12.4	571
Total Retail Trade	44-45	\$674,253,192	\$887,157,635	-\$212,904,443	-13.6	435
Total Food & Drink	722	\$68,200,263	\$64,821,791	\$3,378,472	2.5	136
Industry Group	NAICS	Demand (Retail Potential)	Supply (Retail Sales)	Retail Gap	Leakage/Surplus Factor	Number of Businesses
Motor Vehicle & Parts Dealers	441	\$147,662,689	\$192,997,545	-\$45,334,856	-13.3	81
Automobile Dealers	4411	\$117,311,046	\$89,362,090	\$27,948,956	13.5	23
Other Motor Vehicle Dealers	4412	\$18,891,463	\$87,961,929	-\$69,070,466	-64.6	33
Auto Parts, Accessories & Tire Stores	4413	\$11,460,180	\$15,673,525	-\$4,213,345	-15.5	25
Furniture & Home Furnishings Stores	442	\$19,032,995	\$14,512,701	\$4,520,294	13.5	28
Furniture Stores	4421	\$11,415,038	\$5,826,707	\$5,588,331	32.4	9
Home Furnishings Stores	4422	\$7,617,956	\$8,685,994	-\$1,068,038	-6.6	18
Electronics & Appliance Stores	443	\$43,761,226	\$39,126,718	\$4,634,508	5.6	38
Bldg Materials, Garden Equip. & Supply Stores	444	\$32,583,510	\$168,317,082	-\$135,733,572	-67.6	68
Bldg Material & Supplies Dealers	4441	\$26,268,794	\$139,007,073	-\$112,738,279	-68.2	56
Lawn & Garden Equip & Supply Stores	4442	\$6,314,716	\$29,310,008	-\$22,995,292	-64.5	13
Food & Beverage Stores	445	\$133,016,458	\$96,399,008	\$36,617,450	16.0	51
Grocery Stores	4451	\$118,270,511	\$80,862,414	\$37,408,097	18.8	31
Specialty Food Stores	4452	\$6,501,620	\$12,666,017	-\$6,164,397	-32.2	17
Beer, Wine & Liquor Stores	4453	\$8,244,327	\$2,870,577	\$5,373,750	48.3	3
Health & Personal Care Stores	446,4461	\$36,017,868	\$26,270,412	\$9,747,456	15.6	13
Gasoline Stations	447,4471	\$41,340,025	\$38,990,929	\$2,349,096	2.9	13
Clothing & Clothing Accessories Stores	448	\$35,106,093	\$12,245,762	\$22,860,331	48.3	18
Clothing Stores	4481	\$24,759,705	\$5,437,529	\$19,322,176	64.0	7
Shoe Stores	4482	\$4,953,201	\$3,624,112	\$1,329,089	15.5	3
Jewelry, Luggage & Leather Goods Stores	4483	\$5,393,187	\$3,184,121	\$2,209,066	25.8	8
Sporting Goods, Hobby, Book & Music Stores	451	\$20,717,985	\$59,891,746	-\$39,173,761	-48.6	38
Sporting Goods/Hobby/Musical Instr Stores	4511	\$18,262,126	\$57,618,688	-\$39,356,562	-51.9	33
Book, Periodical & Music Stores	4512	\$2,455,859	\$2,273,058	\$182,801	3.9	6
General Merchandise Stores					-21.4	17
Department Stores Excluding Lea					-31.0	7

- Note the geography
- Know what the numbers mean
- Leakage may be a potential opportunity
- Or not!

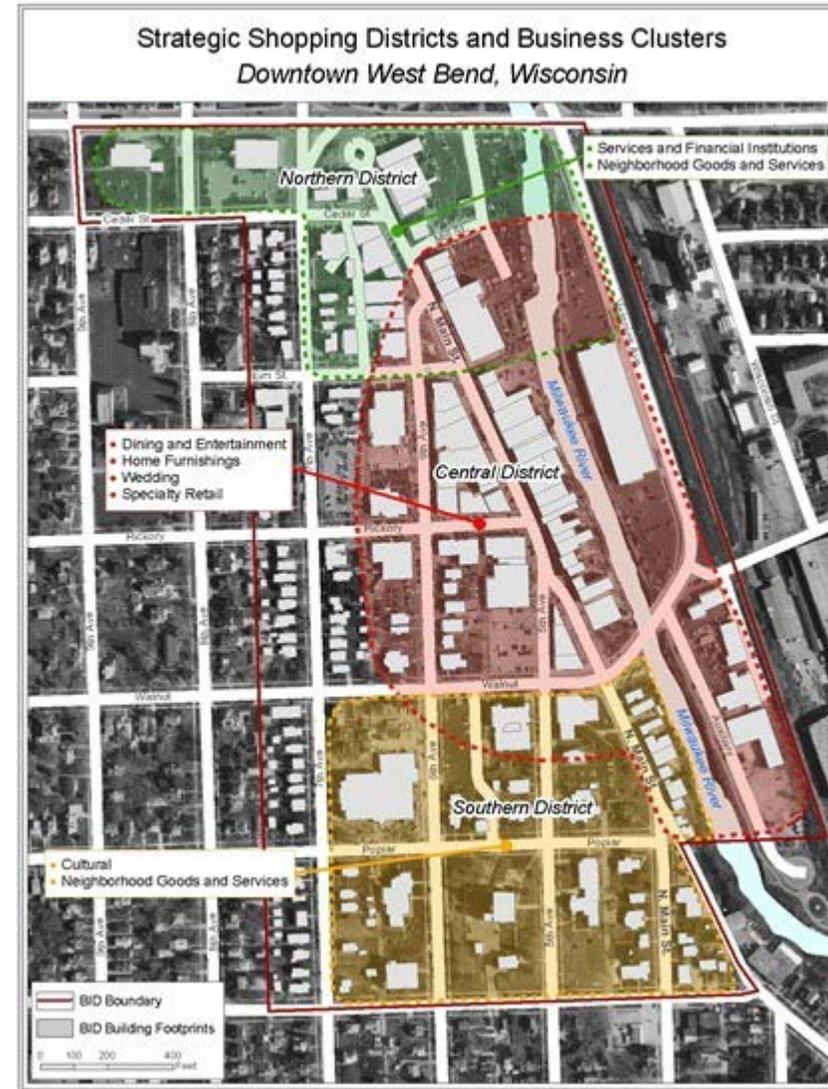
Free Data Sources

- State of Oregon
 - Oregon Prospector
 - <http://www.oregonprospector.com/>
 - Department of Employment
 - Staff time
 - <http://qualityinfo.org/>
 - Travel Oregon
 - <http://www.deanrunyan.com/ORTravelImpacts/ORTravelImpacts.html#>
 - DLCD
- US Census
 - <http://onthemap.ces.census.gov/>
 - <http://factfinder.census.gov/>
- Other
 - <http://www.lcog.org/>
 - <http://www.walkscore.com>
 - <https://fyi.uwex.edu/downtown-market-analysis/>

I ♥ FREE STUFF

Use that data!

- Local Projects
 - Clusters
 - Niche
 - Anomaly
 - Time series
 - Benchmark
- Identify primary research and commercial data needs



Use that data!

- Business Retention
 - Change product line and mix
 - Change customer focus
 - Identify additional opportunities
 - Establish capture rate opportunities
- Business Expansion
 - Location/relocation
 - Target markets
 - Business plan projections



Use that data!

- Business Recruitment
 - Overall demand
 - Competitive analysis
 - Location decision
 - Business plan and market share projections
- Downtown Housing Opportunities
 - Demographics
 - Live/work/commute patterns
 - More spenders more spending
 - Housing incentives



Use that data!

- City Hall
 - Land use decisions
 - Infrastructure priorities
 - Importance of downtown and Main Street
 - Transportation decisions
- Economic Development Policy
 - Local market opportunities
 - Workforce identification
 - Contribution of downtown to whole economy
 - Conversion of inbound workers to residents
 - Conversion of outbound workers to local jobs/businesses



Use that data!

- Other public sector decisions
 - School district decisions
 - County government decisions
 - Regional transportation authorities
 - Housing authorities/advocates
- Media
 - Importance of downtown
 - Patterns of use now and future
 - Favorable coverage of downtown opportunity



Use that data!

- Promotion, Organization, Design
 - Identify members/volunteers/advocates
 - Advocacy for streetscape improvements
 - Identify new festival and events, participants and vendors
- Main Street Organizations
 - One stop shop for stakeholders
 - Credibility as economic development player
 - Provide extremely valuable information
- Performance
 - Measure and communicate



Thank you!

Questions?

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