FARMINGTON

RETAIL AND BUSINESS PARK DEVELOPMENT POTENTIAL

Prepared for

CITY OF FARMINGTON

A PROUD PAST • A PROMISING FUTURE

October 2007

McCOMB GROUP, Ltd.

REAL ESTATE AND RETAIL CONSULTANTS

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Prepared by

Maus Group
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SUMMARY OF FINDINGS AND DEVELOPMENT STRATEGY

Farmington is updating its comprehensive plan to accommodate additional residential, retail and business development. New development will capitalize on previous Farmington investments including development and successful marketing of the Farmington Industrial Park and creation of the Spruce Street Commercial Area. The decision to relocate City Hall in Downtown retains an important destination in downtown.

Development Potential

Future development potential for retail, services and business park establishments through 2030 are summarized in Table i. Acres of land needed for this development is also shown for each type of development.

Table i

ESTIMATED INCREASED RETAIL, SERVICE AND BUSINESS PARK SPACE
AND LAND; 2010 TO 2030

	Square Feet			Land
Category	Demand	Contingency	Total	(Acres)
Retail				
Retail Stores	341,000	500,000	841,000	84
Services	299,000	50,000	349,000	35
Medical	100,000	50,000	150,000	15
Other	100,000		100,000	10
Subtotal	840,000	600,000	1,440,000	144
Business Park				
Office Warehouse/Industrial	1,675,000	420,000	2,095,000	175
Commercial Office	400,000	100,000	500,000	50
Office Showroom	180,000	45,000	225,000	19
Bulk Warehouse	590,000	150,000	740,000	62
Subtotal	2,845,000	715,000	3,560,000	306
Total	3,685,000	1,315,000	5,000,000	450

Source: McComb Group, Ltd.

Farmington currently has about 640,000 square feet of retail stores, services and medical offices. Retail stores total about 223,000 square feet and services total about 240,000 square feet. Medical offices currently occupy about 64,000 square feet. There's an additional 133,500 square feet of space that could not be identified as clearly retail stores or services and is identified as other.

Additional retail space demand by 2030 is estimated at 840,000 square feet. A contingency of 600,000 square feet is provided to accommodate unforeseen retail development. This contingency has been allocated to each retail category. The contingency is provided to ensure that Farmington will have retail space in the period beyond 2030. Most of this contingency, 500,000 square feet, has been allocated to retail since this is the category which accounts for the big box stores (i.e. SuperTarget, Wal-Mart Superstore, Home Depot, Menards, etc.). Land area estimated to accommodate this retail development is estimated at 144 acres excluding water retention and streets.

Existing business park type buildings total over 1.1 million square feet. Office warehouse/industrial is the largest category with 809,500 square feet and bulk warehouse totals 195,600 square feet. The Farmington Industrial Park is responsible for much of the industrial development in Farmington.

Business park space demand is estimated at over 2.8 million square feet with office warehouse/industrial accounting for about 60 percent of the estimated demand. Commercial office is estimated at 400,000 square feet and bulk warehouse accounts for 590,000 square feet. Office showroom is a relatively small category estimated at 180,000 square feet. A contingency of 25 percent (715,000 square feet) has been provided for two reasons: 1) Farmington's growth will not end in 2030; and 2) the contingency space will provide for the possibility that demand for business park space exceeds the baseline estimates. Land necessary to support business park demand is estimated at 306 acres excluding water retention and streets.

Space Absorption

Estimated demand for retail and business park space increases steadily over the 23-year analysis period with the largest increase in the 2025 to 2030 period, as shown in Table ii. This is due to the growing metropolitan economy, Farmington's growth, and reduced supply of competitive sites in other communities.

Table ii

ESTIMATED INCREASED RETIAL, SERVICE AND BUSINESS PARK SPACE
AND LAND; 2010 TO 2030
(In Thousands of Square Feet)

	Cumulative Increase				
Category	2010	2015	2020	2025	2030
Retail					
Retail Stores	15	82	202	262	341
Services	14	61	113	192	299
Medical	6	19	38	65	100
Other	6	19	38	65	100
Subtotal	41	181	391	584	840
Contingency	31	115	229	386	600
Total	72	296	620	970	1,440
Business Park					
Office Warehouse/Industrial	138	367	683	1,115	1,675
Commercial Office	20	76	146	252	400
Office Showroom	4	27	66	115	180
Bulk Warehouse	30	96	201	359	590
Subtotal	192	566	1,096	1,841	2,845
Contingency	48	142	274	460	711
Total	240	708	1,370	2,301	3,556
Land (acres)					
Retail	8	30	62	97	144
Business Park	21	63	119	198	306
Total	29	93	181	295	450

Source: McComb Group, Ltd.

Estimated demand for retail, service and medical offices accelerates to an additional 840,000 square feet by 2030. The largest increase in space occurs in the later years of the analysis period. The estimated increase between 2010 and 2015 is 140,000 square feet, which increases to 210,000 square feet in 2020. The estimated increase in demand is 193,000 square feet in 2025 with a further increase of 256,000 square feet by 2030. For purposes of preparing absorption estimates, the contingency was allocated to each five-year period beginning with 31,000 square feet in 2010.

Land needed to support the above retail demand is contained at the bottom of Table ii. One acre of land will support about 10,000 square feet of gross leasable area, excluding land for water retention. This indicates demand for about 84 acres. Adding 60 acres for the 600,000 square foot contingency brings total additional land area to 144 acres by 2030.

Estimated business park demand by five-year period is contained in the lower portion of Table ii by building type. These are baseline forecasts and do not take into consideration the current economic environment that may restrain development of business park properties. The total additional business park space by 2010 is estimated at 240,000 square feet. For 2015, the estimated demand increases to 708,000 square feet, an increase of 468,000 square feet for the five-year period from 2010 to 2015. Baseline demand in 2020 is estimated at 1,370,000 square feet, an increase of 662,000 square feet from 2015. This table demonstrates that space demand increases with the largest space demand is estimated for the period 2020 to 2025 (931,000 square feet) and 2025 to 2030 (1,255,000 square feet).

Retail Development Strategy

Growing population and households in Farmington's trade area will provide support for a growing number of retailers over the next 23 years. Retail potential is focused primarily in convenience goods, food service, services and medical, or those business establishments that are generally patronized by customers that live near the business establishment. Demand for shopping goods, which include apparel and accessories, electronics, home furnishings, and other specialty stores, have more limited potential because the Farmington trade area does not have enough households to support most of these types of businesses.

Significant retail development occurs around anchor stores that attract customer traffic. Examples of anchor stores include supermarkets, drug stores, discount stores, superstores, department stores, and home centers. Retailers and services attracted by anchor stores differ by type of store. Supermarkets and drug stores attract convenience retailers, liquor, florists, fast food and personal services. Discount stores and superstores attract many of the same convenience stores and services and a limited number of shopping goods stores. Department stores attract shopping goods retailers, fast food, and restaurants. Home centers and other destination stores, such as furniture, appeal to a smaller group of retail stores as a draw. New anchor stores, because of their size (55,000 to 200,000 square feet), will be most likely to locate in the Spruce Street Commercial Area. How and when this occurs will affect downtown business establishments.

Supportable square footage analysis indicates that Farmington will be able to support an additional supermarket. The timing of this new supermarket is important to Downtown Farmington. Farmington's trade area should be able to support two supermarkets sometime around 2015. This supermarket is likely to locate in the Spruce Street Commercial Area. If a new supermarket is constructed before the trade area can support two stores, it's possible that Econofoods could be forced out of business in a scenario similar to that which occurred in Rosemount when Knowlan's opened causing the downtown supermarket to close. Subsequently, Cub opened a store and Knowlan's closed. Customer traffic to other stores in Downtown Farmington would suffer if Econofoods were to close.

Analysis in this report demonstrates support for a discount superstore in about 2015 to 2020. A superstore would reduce market share and sales for any supermarkets operating in Farmington. Due to its smaller size, Econofoods could be most vulnerable.

Notwithstanding the timing for supermarket or superstore development contained in this report, major anchor stores are concerned about market share and the development activities of their competitors. This can cause a retailer to build a store before a market can fully support the store to prevent a competitor from locating in the market. As a result, an anchor store could choose to locate in Farmington to prevent a competitor from opening a store in the area. The timing of these types of development decisions is unpredictable, but do have ramifications for Farmington.

Farmington's comprehensive plan emphasizes maintaining Downtown as a major retail area and also provides for retail expansion into the Spruce Street Commercial Area. Current drafts of the 2030 comprehensive plan identify new retail areas north of TH-3 at 195^{th} Street, and on Flagstaff south of 195^{th} Street. These should be convenience shopping areas. A convenience shopping area could also be planned at CSAH 50 and Flagstaff. These convenience shopping areas should be five to ten acres in size and designed to accommodate the types of uses found at Marketplace and Charleswood.

Downtown Farmington is the area's dominate retail location due to its historic base of retail stores and services. It is important to improve Downtown's attractiveness to retailer stores and services.

Retail potential in Downtown Farmington can be strengthened by locating new businesses that serve as major customer draws in the downtown area. This is similar to the city's decision to build its new City Hall in Downtown.

To encourage retail development in Downtown Farmington, the city could consider establishing a retail incubator to attract new retail stores to Farmington at affordable occupancy costs. The key to maintaining the vitality of Downtown Farmington is to have a growing number and diverse mix of attractive retail stores, restaurants and services that can meet the needs of trade area residents and visitors.

Building owners and retailers in Farmington's older retail areas (Downtown and Highway 3) should be encouraged to update and modernize their space to present a more contemporary appearance. This includes updating storefronts and interior finishes and fixtures. Downtown retailers should seek to be comparable to their competitors on Pilot Knob and in Apple Valley, Lakeville and Rosemount. Most national and regional retail chains have refurbishment schedules of seven to ten years.

Over the next 25 years, some of Farmington's existing retail buildings are likely to be redeveloped to accommodate expansion of existing retailers or new retailers choosing to locate in these areas. The City of Farmington should encourage these redevelopment activities and should establish programs to enable redevelopment to be economically feasible.

Business Park Development Strategy

Since 1990, about 450,000 square feet of business park space has been developed in Farmington. Industrial Park tenants indicated they located in Farmington due to the availability of affordable land and friendly business climate. Farmington should capitalize on this "good will" in its business development activities. This will help to mitigate development industry misconceptions of Farmington identified in broker interviews. A strategy that will help Farmington achieve a balanced growth would include the following:

- ♦ Land use policy that promotes a balanced growth that includes a mix of office and industrial users to help support Farmington's tax base and minimize the real estate tax on homeowners.

- ♦ Target industries that are not heavily dependent on transportation. Because Farmington is not on a primary transportation corridor like I-35, industries that depend on a road network to receive and ship large quantities of raw materials and finished goods will find Farmington less accessible than other locations.

- ♦ Building values tend to reflect the wages and talent of the people working inside. It is important to create jobs that enable employees to live within the community. These employees are likely to have higher disposable income to support local businesses. This will reduce traffic congestion created by commuters that leave the community to find employment.

- ♦ Development covenants for the industrial park will be important to ensuring that higher value real estate is developed. However, some communities create covenants that are overly restrictive and complex, which will often discourage industry from locating in their area. Covenants that are extensive and detailed are not necessary and can suggest an unfriendly local business climate.

- ♦ Focus on the creation of wealth rather than the number of jobs created. High value investment will create jobs for highly paid skilled workers to operate the facility. High value investment tends to create a sense of permanence. Light assembly and warehouse tenants and owners are fairly mobile. The spaces they occupy are flexible and commodity real estate that is easily adaptable for new users. High value investment often includes expensive equipment that is very difficult and costly to move and often requires customized buildings.

- ♦ The area to the west of the Industrial Park should be guided business park and sized to accommodate projected demand in this report.

- ♦ It is very important to control the cost of land to promote business park development. In order to minimize up front acquisition and infrastructure cost, the EDA should investigate several scenarios to control land and cost. These include:

    - This could be as simple as acquiring a renewable option on the proposed business park property. Option money is not subjected to ordinary income tax until the option is exercised. Therefore, a land owner could continue to farm the land and collect option money not immediately subject to income tax.
    - The EDA could enter into a purchase agreement with a land owner that includes a "take down" provision that would allow the EDA to exercise a purchase at a predetermined price when a buyer is found or to take down land on a scheduled basis over an extended number of years.
    - The EDA could enter into an option agreement for a nearby farm at a lower price and facilitate a 1031 tax free exchange with another land owner near to the business park allowing the owner to avoid paying a capital gain tax.

- ♦ It is important to develop a business park layout that is flexible. Utilities should not be extended beyond the entrance. To do so would commit the city to a final design and preclude flexible lot configuration and size for potential users. A preliminary plat can be developed and finalized as each lot is sold.

- ♦ The EDA should consider developing a business incubator building. This could be a multi-tenant building with added improvements that would allow emerging companies with new technologies to become established and hopefully later grow into the business park. It may be necessary to provide TIF, deferred assessments or other incentives to encourage a private developer to create a building with these added amenities.

- ♦ The EDA should create a targeted marketing program focusing on specific industries and businesses south of the river. This would include direct mail and personal contact by EDA staff.

Farmington's development strategy should focus on local and regional businesses that are likely to have more flexible location criteria than national firms. Farmington's favorable business climate is a significant advantage. Farmington has the ability to build on the success of the existing Industrial Park.

INTRODUCTION

McComb Group, Ltd. was engaged by the City of Farmington to conduct market analysis to estimate future demand for retail and industrial space through 2030. Work tasks conducted during this engagement are summarized below.

Retail Market Analysis

Retail market analysis was conducted to identify demand for retail, food services, and services in Farmington. Specific work tasks conducted for the retail market analysis portion of the study are described below.

- ♦ Existing retail areas in Farmington were evaluated to determine their suitability for future development. Factors that were evaluated include, but were not limited to: location, ingress and egress, access, visibility, current and future traffic counts, and relationship to adjacent uses. Potential locations for new retail locations were identified. Retail buildings and tenant mix in Farmington, their square footage and year built was provided by the city.

- ♦ Comprehensive plans for adjacent communities were evaluated to determine residential and commercial development potential. Past growth trends in the south growth corridor were evaluated to determine residential growth trends in Farmington and surrounding communities. This analysis was used to prepare market driven estimates of household growth in Farmington's trade areas for 2010, 2015, 2020, 2025 and 2030.

- ♦ Shopping areas competitive with Farmington commercial areas were identified and evaluated to determine competitive impacts on future retail development. Principal competitors were identified and evaluated for tenant mix, retail GLA, and anchor stores. Future developments and redevelopments in the study area were identified to the extent possible. Retail tenants in competitive retail areas in Lakeville, Hampton, Cannon Falls, and Randolph were identified by city staff.

- ♦ Owners and managers of businesses in Farmington were interviewed to obtain their observations on retail trends, competitive pressures, where their customers live, strengths and weaknesses, and other information pertinent to the study.

- ♦ Retail businesses in Downtown Farmington were asked to participate in a survey of their customers to determine where they live and work and why they shop at that business. This information was used to help identify the primary trade area for the Downtown Farmington commercial area and the amount of inflow patronage.

- ♦ Developers and brokers interested in retail locations in Farmington were interviewed to determine their development plans and their ideas of the type of businesses or development that is suitable for the area.

- Primary trade areas for Downtown and other Farmington retail areas were delineated based on arterial road patterns, drive times, and McComb Group experience. Demographic characteristics of the trade areas were analyzed to identify and quantify those factors that generate support for retail and service establishments. Factors evaluated include, but were not limited to: population, households, building permits, and household income. Trade area household growth trends were evaluated to determine residential growth potential for target years of 2010, 2015, 2020, 2025 and 2030. Retail and service purchasing power of trade area households was estimated.

- Future retail development potential for Farmington retail areas was estimated taking into consideration competitive impacts, trade area demographics, and trade area purchasing power and estimated market share. Future retail and service sales potential for Farmington was estimated by business type based on purchasing power, competitive shopping centers and current retail trends. Estimates of retail, service and office service space supportable by sales potential were prepared for target years of 2010, 2015, 2020, 2025 and 2030. The types of shopping center environments suitable for the potential uses were identified, as well as suitable locations.

- The estimated future demand for retail uses in Farmington was compared with the available supply of developable land and its location. Developable sites were evaluated for retail use.

- McComb Group met with city staff to review development potential as it relates to specific areas in Farmington and discussed how and where to accommodate future growth potential.

Office and Industrial Market Analysis

Office and industrial market analysis was conducted to identify demand for office and industrial development potential through 2030. Specific work tasks conducted for the office and industrial portion of the study are described below.

- Existing and potential business park and industrial locations in Farmington were evaluated to determine their suitability for development. Factors that were evaluated include, but were not limited to: location, ingress and egress, access, visibility, current and future traffic counts, and relationship to adjacent uses. Office and industrial buildings in Farmington, their square footage and year built were identified by city staff.

- Developers and brokers interested in office/industrial locations in Farmington were interviewed to determine their development plans and their ideas of the type of businesses or development that is suitable for the area.

- Market analysis was conducted to determine the historic absorption of office, office warehouse, office showroom, industrial and single tenant uses in the south metro area. The portion of that absorption that has been captured in Farmington was quantified. Future absorption for office, office warehouse, office showroom, industrial and single tenant space was estimated for the southwest submarket and Farmington. Future absorption was analyzed by type of product and location criteria, and compared with potential development areas within Farmington.

- ♦ The estimated demand for office/industrial uses in Farmington was compared with the available supply of developable land and its location. Developable sites were evaluated for office/industrial use. Development areas were prioritized as to their suitability for office/industrial development.

- ♦ McComb Group staff met with city staff to review development potential as it relates to specific areas in Farmington and discussed how and where to accommodate future growth potential.

This report contains the primary information needed to support the principal conclusions. However, in a report of this nature, it is not possible to include all of the information that was developed and evaluated. Any additional information will be furnished upon request.

Report Purpose

This report was prepared in accordance with our proposal dated April 16, 2007. This report was prepared with the understanding that the results of our work will be used by the client in updating its comprehensive plan. Our report was prepared for that purpose and is subject to the following qualifications:

- Our analysis did not ascertain the legal and regulatory requirements applicable to this project including zoning, other state and local government regulations, permits and licenses. No effort was made to determine the possible effect on the proposed project of present or future federal, state or local legislation, or any environmental or ecological matters.
- Our report and analysis was based on estimates, assumptions and other information developed from research of the market, knowledge of the industry and discussions with the client. Some assumptions inevitably will not materialize and unanticipated events and circumstances may occur; therefore, actual results achieved will vary from the analysis.
- Our analysis did not evaluate management's effectiveness nor are we responsible for future marketing efforts and other management actions upon which actual results are dependent.

Our report is intended solely for the purpose described above and should not be used for any other purpose without our prior written permission. Permission for other use of the report will be granted only upon meeting company standards for the proposed use.

Chapter I

FARMINGTON SHOPPING AREAS

Farmington is a growing suburban community in the southern Twin Cities Metropolitan Area. Residential development in the northern portion of the city is creating demand for additional retail and service establishments. Farmington's two oldest retail areas: Downtown and auto-oriented strip retail along TH-3 have been augmented by newer shopping areas as residential development occurred along Pilot Knob and east of TH-3.

Retail Areas

Farmington currently has five retail areas, as shown on Map 1, which offer a variety of goods and services, as shown in Table 1.

- **Downtown** is the area generally bounded by Willow Street, Fifth Street, Walnut Street and First Street. Downtown has the largest concentration of retail and service establishments in Farmington with 31 retail stores and 54 services, including Farmington City Center which includes seven tenants: five service-oriented businesses and two limited service food establishments. Downtown convenience retailers include Econofoods supermarket, Farmington Liquors, Ace Hardware, a floral shop and a video store. Food service is Downtown's largest category with 11 establishments: two full service restaurants, eight fast food places and one drinking establishment. Shopping goods are represented by eight specialty stores. Other retailers include a convenience store, two home improvement stores, two automotive sales establishments and two auto parts stores. Downtown's 54 services represent a wide variety of establishments including eight personal care and personal service establishments, eight financial services, six insurance offices, five entertainment/recreation establishments, and seven medical and dental offices. Downtown has a diversified mix of convenience retail and service establishments.

- **Highway 3** is an older commercial area, focused on the intersection of TH-3 and CSAH 50, that has evolved into a convenience retail and service area with a large concentration of auto-related uses including three used car dealers and seven auto repair garages. This retail area includes businesses that are located in Castle Rock Township. Farmington Mall, built in the late 1950's, has approximately 16 tenants mainly focused on providing services to area residents. With 33 establishments, this is Farmington's second largest retail area with 25 services and 8 retail stores.

- **Pilot Knob** area contains two convenience retail areas with some of the newest retail and service establishments in Farmington. Marketplace, located between 182nd and 184th Streets, contains 24 establishments: 9 retail stores and 15 services. This area consists of three small convenience centers and two convenience/gas stores. Retail establishments include a video store, six food services, six personal care services, Farmington Liquors, and an exercise facility. A second convenience center, Charleswood, will be anchored by CVS Pharmacy and a Fairview Clinic.

Map 1

FARMINGTON RETAIL AREAS

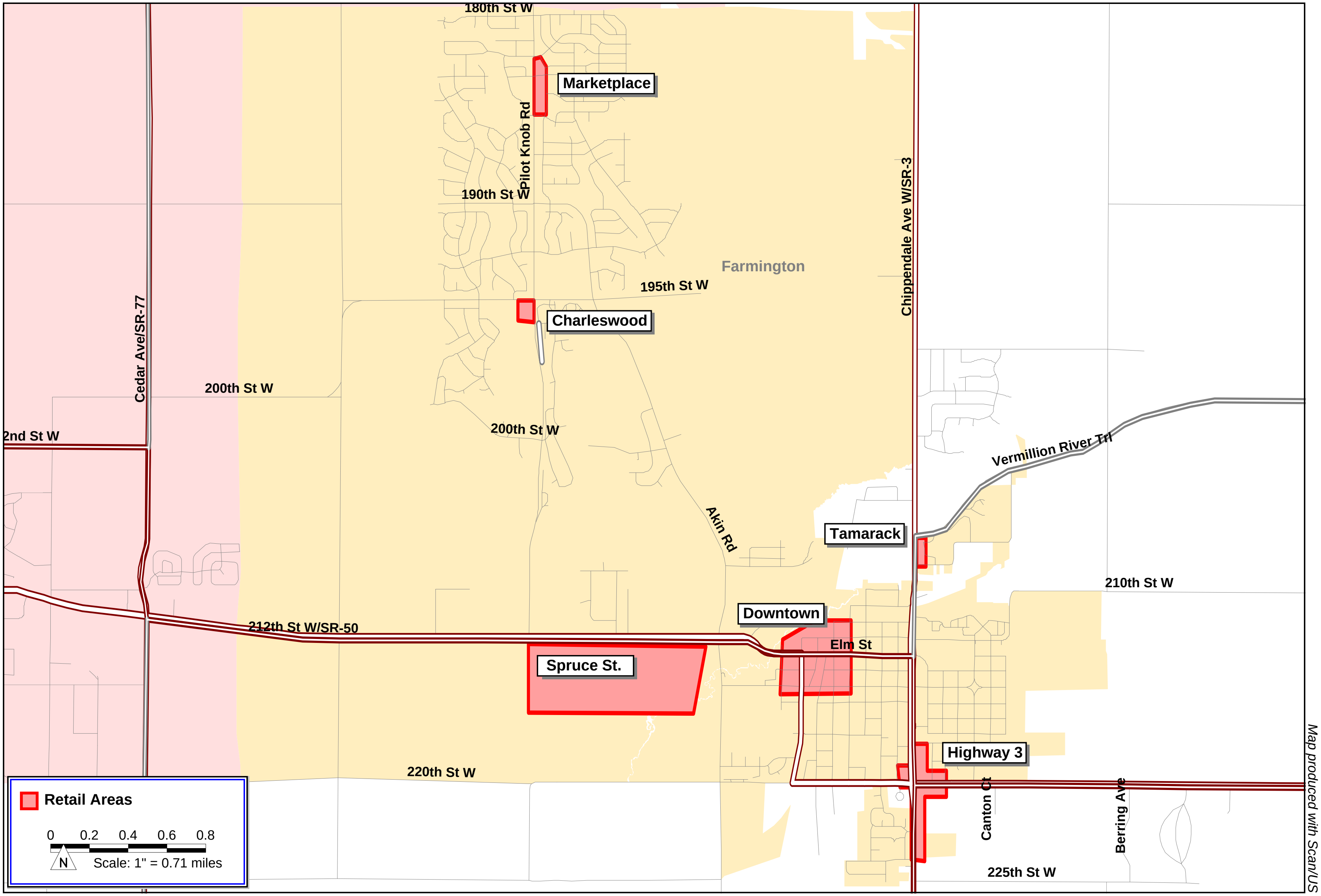

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Table 1

FARMINGTON RETAIL AREAS

Establishment Type	Downtown	Highway 3	Pilot Knob	Spruce Street	Tamarack	Other	Total
RETAIL							
Convenience Retail							
Food	1						1
Drug Store			1				1
Liquor	1		1				2
Hardware	1						1
Floral	1						1
Video	1		1				2
Food Service							
Full Service	2	1	2			1	6
Limited Service	8		3	1	1	1	14
Drinking Establishments	1						1
Convenience/Gasoline							
Convenience/Gasoline	1	2	2				5
Shopping Goods							
Apparel/Accessories	2						2
Furniture & Home Furnishings	1	1					2
Electronics					1		1
Other Shopping Goods	5						5
Home Improvement							
Home Improvement	2	1		3		1	7
Lawn & Garden						2	2
Automotive							
Auto/RV Sales	2	3					5
Auto Parts	2						2
Total Retail	31	8	10	4	2	5	60
SERVICES							
Auto Services	3	7		1		3	14
Personal Care	4	2	6				12
Personal Services	4	2	1	1		2	10
Business Services	1		1	1			3
Laundry/Dry Cleaning	1	1					2
Financial	8	2	1	1	2		14
Real Estate	2			1			3
Insurance	6	2	1		1		10
Medical	4	2	5	2		3	16
Dental	3	1				1	5
Entertainment/Recreation	5	2	1		1		9
Professional Services	1						1
Lodging						1	1
Other Services	6	4				13	23
Government	3						3
Fraternal	3					1	4
Total Services	54	25	16	7	4	24	130
TOTAL	85	33	26	11	6	29	190

Source: City of Farmington and McComb Group, Ltd.

- **Spruce Street Area** is an emerging retail area located on CSAH 50 (212th Street West), extending from Denmark Avenue to Pilot Knob. This area currently contains a McDonalds restaurant and Family Health Medical Clinic. The Spruce Street area, with

330 acres, is planned as Farmington's major retail expansion area. It is connected to Downtown by CSAH 50 and Spruce Street, and is well located to serve residential development to the north, east and west. Three home improvement businesses and eight service establishments are located in the Industrial Park north of CSAH 50. Services include a small motor repair shop, two medical offices, a home care service, real estate office and financial office.

- **Tamarack**, at TH-3 and Vermillion River Trail, is the location of Tamarack Ridge Center constructed in 2005. Its six establishments include Round Bank, Dunn Bros. Coffee, H&R Block, Sprint, Anytime Fitness, an insurance office and eight vacant spaces.

An additional 29 business establishments are located elsewhere in Farmington. This includes five retail establishments and 24 services. The most significant are Allina Medical Center and Dakota Lumber.

Currently, Downtown Farmington is the dominant retail, service and government center for the community, with 52 percent of the retail establishments and 42 percent of the services. The decision to build a new City Hall in Downtown will benefit downtown business because City Hall serves as an anchor that draws people to downtown. Retail and service establishments in each retail area are contained in Appendix A.

Chapter II

COMPETITIVE SHOPPING AREAS

Farmington retail and service establishments are competitive with a variety of shopping areas in Dakota County. Convenience retail and services are competitive with other convenience retailers in Apple Valley, Lakeville, Rosemount and Cannon Falls. Hampton and Randolph have very limited retail and service offerings (nine each) and are not competitive with Farmington retail areas. As a result, they are not included in this analysis.

COMPETITIVE SHOPPING AREAS

Competitive shopping areas provide various levels of convenience and shopping goods to Farmington residents within their trade areas. These competitive retail areas also affect the trade areas for Farmington retail areas. Competitive shopping areas include neighborhood and community shopping areas, as well as commercial areas in outlying communities. Competitive shopping areas are shown on Map 2. Tenant mix for these shopping areas, summarized in Table 2, are described below.

Apple Valley

Downtown Apple Valley, centered around the intersection of CSAH 42 and Cedar Avenue, is the largest retail concentration competitive with Farmington. For purposes of this study, retail and services located in the areas surrounding this intersection are considered competitive. These areas include Southport Centre, Apple Valley Plaza, Apple Valley Square, Fischer Marketplace and other smaller centers, which total over 170 retail and service options for area consumers.

Downtown Apple Valley is anchored by some of the area's largest retailers: Wal-Mart, SuperTarget, Sam's Club, Kohl's, Menards, Home Depot, Cub and Rainbow. In addition, there are over 50 shopping goods stores, over 40 full service and limited service food establishments, and 53 services. Service establishments include 17 personal care services, five financial services, five laundry/dry cleaning, four medical and dental services, and numerous other service establishments. The large number of anchor stores combined with the wide variety of specialty stores, restaurants and services make Apple Valley the dominant shopping area in central Dakota County. The close proximity to Farmington makes this area an appealing destination for Farmington residents.

Lakeville

Lakeville has numerous retail clusters located primarily along I-35, Cedar Avenue and Dodd Boulevard. Those retail areas along I-35 are not competitive due to their distance from Farmington. Four other retail nodes are competitive with Farmington: Downtown, Heritage Commons, Crossroads of Lakeville and Lakeville Crossings.

- **Downtown Lakeville** is located directly west of Farmington on CSAH 50 north of 210th Street. This area has 14 retail stores and 28 services. These businesses are typical of a small downtown and include a drug store, hardware store, eight shopping goods stores, three food service establishments and a floral store. Services include seven personal care and personal services, seven financial, four insurance offices, and various other services.

Map 2

FARMINGTON COMPETITIVE RETAIL AREAS

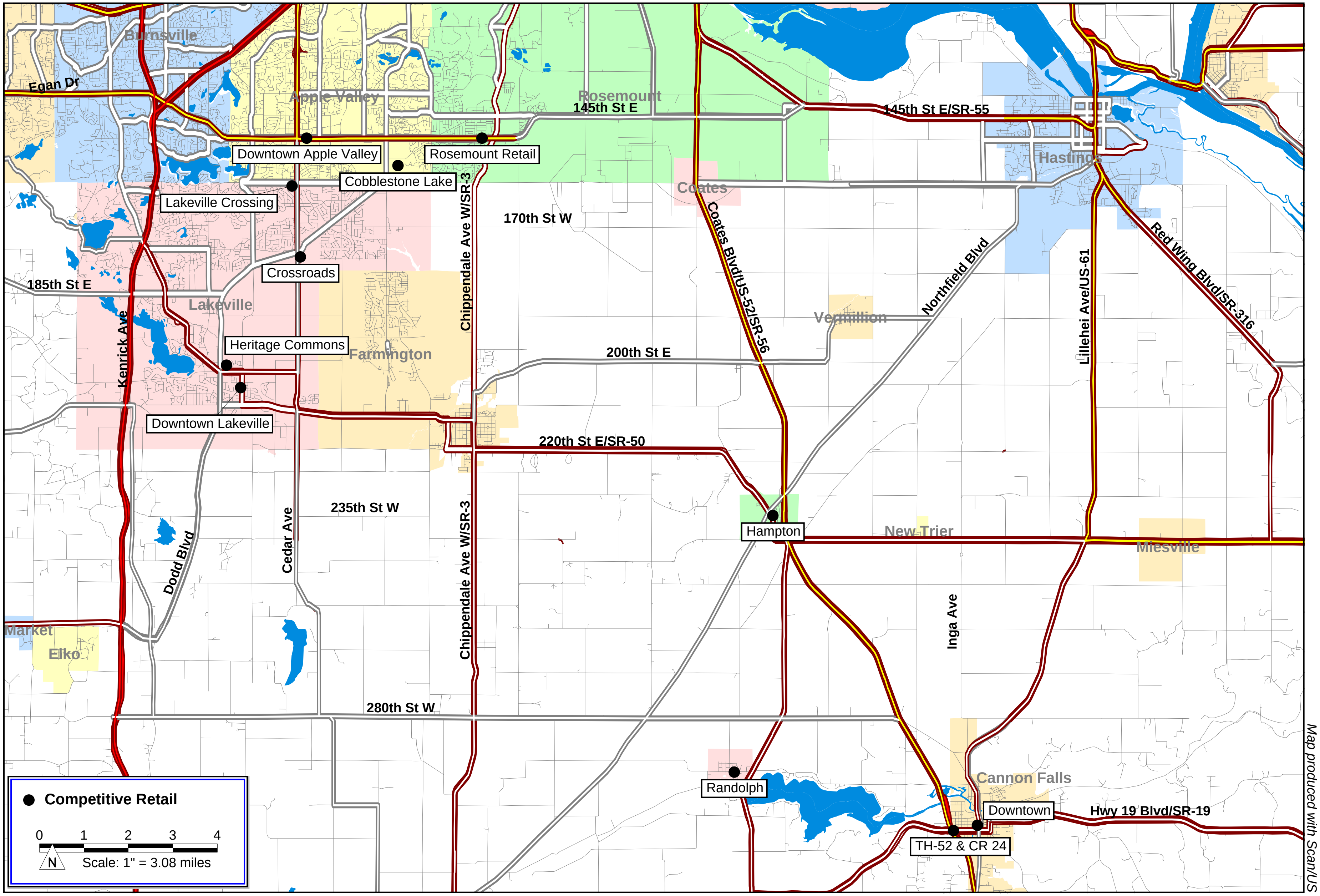

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Table 2

FARMINGTON COMPETITIVE RETAIL AREAS

		Lakeville					Cannon Falls	
Establishment Type	Apple Valley	Downtown	Heritage Commons	Crossroads	Lakeville Crossing	Rosemount	TH-52 & CR 24	Downtown
CONVENIENCE RETAIL								
Food	6		1	1		3		2
Drug Store	4	1		1	1			1
Liquor	2		1		1	3		2
Hardware		1				1	1	2
Floral	2	1				2		
Video	2			1	1	2		2
FOOD SERVICE								
Full Service	20	2	1	4	3	10	3	6
Limited Service	22	1	4	4	1	14	4	4
Drinking Establishments						2	1	2
CONVENIENCE/GASOLINE								
Convenience/Gasoline	3		2		2	4	4	3
SHOPPING GOODS								
General Merchandise	4							
Variety	1	1					1	1
Apparel/Accessories	9		1		1			
Furniture & Home Furnishings	10	3		2		1	2	
Electronics	5			2	1			1
Other Shopping Goods	20	4		2	4	5	5	5
Pre-Owned Merchandise	3				1	2		1
HOME IMPROVEMENT								
Home Improvement	2		1			1	1	1
Lawn & Garden	1							
AUTOMOTIVE								
Auto/RV Sales						2	2	
Auto Parts	4					1	2	
Other Equipment Sales/Marine						3	5	2
Total Retail	120	14	11	17	16	56	31	35
SERVICES								
Auto Services	1	1	2	1	2	9	9	9
Personal Care	17	4	3	5	5	14		3
Personal Services	2	3	3	4	3	3	2	3
Business Services	4		1	1				
Laundry/Dry Cleaning	5		1	1	1	2		2
Financial	5	7	4	2	4	5	3	10
Real Estate	3				1	3	1	4
Insurance	1	4	1	1	2	3	1	9
Medical	2		3		1	4		3
Dental	2		4	2	1	4		
Entertainment/Recreation	4	2	1	4	1	9	2	4
Professional Services		2						2
Lodging	1						2	
Other Services	3	4	3		6	6	9	7
Government						1		3
Vacant	3		1			12		1
Fraternal		1				1		
Total Services	53	28	27	21	27	76	29	60
Total	173	42	38	38	43	132	60	95

Source: McComb Group, Ltd.

- ♦ **Heritage Commons** anchors a commercial area located at the intersection of Dodd Boulevard and 202nd Street, approximately three-quarters of a mile northwest of Downtown Lakeville. Heritage Commons includes over 50,000 square feet of retail and services with an additional 70,000 square foot Cub Foods store currently under construction. This retail concentration began to emerge in phases in 1999 and continues to increase in size. There are 38 retail and service establishments in this area including 11 retail stores and 27 service establishments. Retail venues include the new Cub Foods, a liquor store, five food service venues, and two convenience/gasoline stores. Service establishments include seven medical and dental providers, six personal care and personal service establishments, four financial, and ten other services.
- ♦ **Crossroads of Lakeville** is a community shopping center located in the southeast quadrant of the intersection of Cedar Avenue and Dodd Boulevard. This retail area includes over 170,000 square feet including Cub Foods and CVS, plus 15 other retail stores and 21 service establishments. Food service, personal care, personal services, and entertainment/recreation facilities have the strongest presence in this retail area. There is additional commercial land available at this intersection indicating the potential for additional retail development.
- ♦ **Lakeville Crossing** is a newer shopping center located in the southwest corner of Cedar Avenue and 160th Street. This center was anchored by Kowalski's, which is now closed. There are currently 43 retail and service establishments: 16 retail stores and 27 service establishments, with seven shopping goods, four food service, eight personal care and personal service, and a variety of other retail and service providers.

These retail areas contain 161 retail stores and services, but they are divided between four areas with 38 to 43 businesses each, which reduces the drawing power of each shopping area.

Rosemount

Rosemount is located about seven miles north of Farmington on TH-3. Rosemount retail establishments are generally located along CSAH 42, between TH-3 (Robert Trail) and Shannon Parkway, and in downtown along TH-3. This retail area consists of Rosemount Market Square, Rosemount Crossing, Rosemount Village and Downtown Rosemount. Rosemount contains 132 retail and service establishments including 56 retail stores and 76 services. Most of the recent retail development has been along CSAH 42. Rosemount retail is represented by convenience goods stores including Cub Foods, Aldi Grocery, two liquor stores, hardware store, food service, and a variety of services. Marcus Theatre, with six screens, also anchors this area. Downtown Rosemount contains the largest number of retail and service establishments with 23 retail stores and 47 service establishments.

Cannon Falls

Cannon Falls, located approximately 15 miles southeast, has two retail concentrations that are considered competitive with Farmington: Downtown and TH-52 and County Road 24. These retail areas serve local residents needs and provide a wide variety of retail and service establishments.

- **TH-52 and County Road 24** is an older shopping area along TH-52, west of Downtown Cannon Falls. This area has 60 retail and service establishments including 13 auto retail and service stores, eight food service establishments, eight shopping goods stores, four gas/convenience stores and a variety of other services.

- **Downtown Cannon Falls**, located about one mile east of TH-52 and County Road 24, is the original central business district and has a large concentration of businesses including 35 retail stores and 60 service establishments. Convenience retail includes an Econofoods store, drug store, two liquor stores, two hardware stores and two video stores. There are six restaurants, four fast food, and two drinking establishments, eight shopping goods stores, three gas/convenience stores and five other retail establishments. Downtown is heavily oriented toward services with almost twice as many service establishments as retail establishments. Financial services is the largest category with ten establishments, followed by auto services and insurance with nine establishments each. Additionally, Downtown Cannon Falls has six personal care and personal services along with numerous other service establishments.

Cannon Falls retail offerings are consistent with its role as an out-state city with an agricultural economy.

Other Communities

Three other communities, Hampton, Randolph and Northfield, were considered non-competitive. Hampton and Randolph have very few retail and service establishments. As a result, their residents need to shop outside the community on a regular basis. Northfield is not considered to be competitive with Farmington for several reasons:

1. Downtown Northfield is about 12 miles south of Farmington; and the TH-3 area with Target, Cub and Kmart is about 14 miles distant. Their will be two SuperTarget stores that are more convenient to most of Farmington's trade area residents. Cub has three stores that are closer.
2. Downtown Apple Valley is about nine miles from Downtown Farmington and contains Cub and SuperTarget, as well as many more stores.
3. Retail areas in Lakeville, Apple Valley and Rosemount are the primary competitors for Farmington's retail areas.

New Retail Areas

Continued residential development is attracting additional retail developments with two shopping centers: Crossroads East and Cobblestone Lake**.**

- **Crossroads East** is a new retail development planned for the area adjacent to the existing Crossroads of Lakeville development located at Cedar Avenue and Dodd Boulevard in Lakeville. This retail development is an expansion of the existing Crossroads of Lakeville and includes five acres of developable land.

- **Cobblestone Lake** mixed-use development is located on the northeast corner of Pilot Knob Road and 160th Avenue in Apple Valley. An 180,000 square foot SuperTarget is currently under construction with a planned opening date of March 2008. Plans also include three multi-tenant buildings totaling approximately 34,000 square feet of retail space, with future plans for an additional 15,000 square feet of retail space to include a bank and two restaurants. Pending approvals, construction is expected to begin spring of 2008 on the other retail building.

SUMMARY

Competition for Farmington retail and service establishments is provided by neighborhood centers anchored by convenience goods stores and large community centers anchored by discount stores and other big box retailers. These clusters have located along the major arteries to accommodate easy access from the surrounding communities and also serve commuters. Community centers have attracted big box retailers and smaller retailers have followed, resulting in more variety and greater numbers of retail stores and services. These community centers have greater appeal than convenience goods shopping areas and are able to draw from a farther distance. Trade areas for these larger centers overlap the Farmington trade areas and present a higher level of competition.

Chapter III

FARMINGTON CUSTOMER SURVEY

Retail and service businesses in Downtown Farmington were asked to conduct a brief survey of their customers as part of this study. In total, six businesses participated in this survey to determine home zip code, work zip code, and trip purpose of their customers. Four of the participating businesses were located in Downtown Farmington, one was located on TH-3 and one was located on Pilot Knob Road.

Businesses that participated in the survey are listed in Table 6 at the end of this chapter. Survey participants collected surveys from 660 respondents. These surveys provide important information on the Farmington customer base. Results from the Farmington customer survey were used to determine the trade areas for Downtown Farmington and Marketplace. Over 80 percent of survey respondents lived within Downtown's trade area, while approximately 35 percent of respondents lived within the Marketplace trade area, as shown in Table 3. Trade area inflow represents respondents that live outside of the trade area and "other" represents the number of home addresses that were unable to be located.

Table 3

DOWNTOWN FARMINGTON CUSTOMER SPOTTING
RESPONDENTS HOME ADDRESS

	Trade Area			
	Downtown		Marketplace	
	Number	Percent	Number	Percent
Inside Trade Area	541	82.0 %	233	35.3 %
Trade Area Inflow	41	6.2	349	52.9
Other	78	11.8	78	11.8
Total	660	100.0	660	100.0

Downtown Farmington serves Farmington residents' convenience needs. Consumers from the Marketplace trade area shop both retail areas, Downtown Farmington and Marketplace, likely because Marketplace is unable to fulfill all their retail and service needs.

Survey responses to the question: "Why did you stop here today?" are contained in Table 4. "Close to Home" was the most frequent response (84.7 percent) for Downtown Farmington trade area respondents showing that area residents shop Downtown Farmington for their convenience goods and services. "Regular Customer" was mentioned by 55.5 percent of the trade area respondents, which also reinforces the convenience factor of shopping Downtown Farmington. "Running Errands" was mentioned by 15.7 percent of respondents. Over 14 percent of respondents shopped because it was "close to work", demonstrating that Downtown Farmington retail draws from the area's businesses. Responses for "driving by" and "other" are typical of survey response levels in other commercial areas.

Table 4

DOWNTOWN FARMINGTON TRADE AREA
REASON FOR STOPPING

Reason For Stopping	Number	Percent
Close to Home	458	84.7 %
Close to Work	78	14.4
Driving By	56	10.4
Running Errands	85	15.7
Regular Customer	300	55.5
Other	26	4.8
Total Respondents	541	

Source: McComb Group, Ltd.

Consumers from outside of the Downtown Farmington trade area (inflow) are most likely to be "regular customers" (39.0 percent of inflow respondents) as shown in Table 5. Almost 30 percent of the inflow shoppers stopped because it was "close to work". "Driving by" and "close to home" were mentioned by 17.1 percent of inflow respondents, showing that even though consumers live outside of the trade area, they consider Downtown Farmington a convenient shopping option. "Running errands" was only mentioned by 7.3 percent of inflow respondents; this may be due to the lack of shopping goods retail offerings in Downtown Farmington and the variety of other shopping areas located outside of the trade area. Downtown Farmington benefits from these inflow shoppers that are "regular customers" and others that consider it "close to home".

Table 5

DOWNTOWN FARMINGTON TRADE AREA INFLOW
REASON FOR STOPPING

Reason For Stopping	Number	Percent
Close to Home	7	17.1 %
Close to Work	12	29.3
Driving By	7	17.1
Running Errands	3	7.3
Regular Customer	16	39.0
Other	6	14.6
Total Respondents	41	

Source: McComb Group, Ltd.

The distribution of responses between trade area and inflow shoppers reinforces the convenience nature of shopping in Downtown Farmington. People shopping in Farmington do so generally because it is convenient and the commercial area is located either "close to home", "close to work", or they consider themselves "regular customers".

Summary

Survey results indicate that businesses in Downtown Farmington tend to serve residents within the City of Farmington, north and west on Pilot Knob Road to Apple Valley city limits and east to Chippendale Avenue. This demonstrates the strength of Downtown Farmington's convenience retail and service establishments. These establishments serve the convenience and service needs of trade area residents and customers from outside the immediate area. The synergy of these establishments is important to the strength of Downtown Farmington and allows consumers the ability to cross-shop retailers on one shopping trip, making Downtown Farmington more of a destination.

Table 6

FARMINGTON CUSTOMER SURVEY PARTICIPANTS

Ace Hardware	Farmington Liquors (North)
Dunn Bros. Coffee	Farmington Liquors (South)
Econofoods	Memory Creek

Source: McComb Group, Ltd.

Chapter IV

FARMINGTON MERCHANT INTERVIEWS SUMMARY

Interviews were conducted with 16 Farmington area business owners and managers. A list of the interview participants is included in Table 7. The primary purpose of the interviews was to determine opinions related to the strengths and weaknesses of the Downtown Farmington area, and solicit ideas and opinions regarding changes to retail within Downtown Farmington. All responses are verbatim and reflect the respondent's personal opinions; they were not screened for accuracy.

Table 7

LIST OF MERCHANT SURVEY PARTICIPANTS

Anchor Bank	Memory Creek
Dunn Bros.	Pampered Pet Spa
Econofoods	Pellicci Hardware
Edina Realty	Pizza Man
Farmington Liquor	Previous Owner of Welcome Friends Floral
Gerster Jeweler	Snap Fitness
Janie's Home Team	Ugly Mug Liquor
Kwik Trip	Welcome Friends Floral

Source: McComb Group, Ltd.

Primary Strengths of Doing Business in Downtown Farmington

When asked to describe the primary strengths of doing business in Downtown Farmington, one-quarter of the respondents felt Farmington's small town feel was appealing. Other respondents felt that the look and character of the city including the lamp posts, park benches and just general "charm" were strengths for Farmington. The fact that Farmington's home prices are still considered "affordable" and there are homes close to downtown was also mentioned as a strength. Other responses are listed below:

- Restaurants
- Being on a busy road
- Farmington has great potential
- Drive-up parking so that you can park in front of stores
- Easy access
- Word of mouth
- The city has a quaint, good feeling
- We have repeat customers because we become a part of their lives
- When the streets are done, it could bring in new business

Additionally, respondents believed that the strength of the current retailers encourages doing business in Downtown Farmington. They mentioned the following businesses as "draws" for customers: hardware store, the food service, Bugaloos Ice Cream, Econofoods and the bank.

They also believed that having the school and library downtown helps to draw people to their businesses.

In general, these comments and opinions suggest that business owners have positive feelings about Downtown Farmington's retail area. They continue to see Farmington as a small, quaint downtown with many strengths.

Primary Weaknesses of Doing Business in Downtown Farmington

Almost half of the business owners interviewed seemed to feel that although there are some businesses that draw people downtown, there is generally a lack of choices and not enough retail. One respondent felt strongly about this stating that "it's hard to get new clients, downtown has nothing to offer".

Another issue that is viewed as a weakness for doing business in Downtown Farmington is a perceived lack of support from city government. Comments such as the following showed some discontent with local decision makers:

- "There are too many restrictions on business and city hall is not cooperative."
- "The city does not have a business friendly attitude."
- "There is a lack of planning and communication between the retailers and the city staff."
- "Decisions are being made without input from business owners."
- "Economic development people do not live in the town or shop downtown, they are clueless as to how to market to the community. They need to know the community better; they do not have any personal relationships with local businesses."

Some of this discontent may have come at a time when downtown construction was peaking and issues regarding the festival location were on respondent's minds.

Respondents offered the following additional Downtown Farmington weaknesses:

- No anchor store.
- No effort to fill empty buildings, tenants approach to rent or buy, but owners are doing nothing.
- Store fronts need renovation.
- Coming in on Elm Street, as you approach the railroad track, the west side of buildings look "butt ugly" and in poor condition. This turns people off.
- Too many empty buildings in key areas.
- Stores not kept up – B & B Pizza booths are falling apart.
- There is no advertising or promotion for downtown.
- The parking is bad.

- ♦ Farmington is spreading out as it grows on Pilot Knob. Making a connection between population and downtown is hard.
- ♦ There are no weaknesses for us.
- ♦ Streets were closed for the festival.
- ♦ People were upset because they moved the festival.
- ♦ Road construction!

There were a wide variety of issues and concerns from many business owners in Downtown Farmington. The most frequently noted concerns relate to lack of retail variety and the ability to draw people to the downtown area. As Farmington retail and housing continues to develop on Pilot Knob Road, it may become a challenge to get consumers to venture downtown as the state of downtown retail stands today.

New Businesses for Downtown Farmington

Overwhelmingly, respondents asked for "more restaurants" in Downtown Farmington, specifically family-type restaurants. Respondents felt that there needed to be more places for families to dine without going to Apple Valley. Additionally, respondents asked for more retail stores in general and offered the following ideas as to what types of retail they would like to see (these ideas were mentioned multiple times):

- Gifts
- Applebees
- Boutiques
- Clothing
- Crafts
- Dollar Store
- Book Store
- Hotel
- Kid's Clothes
- Target

The following opinions were also offered:

- ♦ There are so many empty buildings; we need any type of retail.
- ♦ There is a good mix of retail, but we could do better. Making people aware that the businesses are there is the difficult thing.
- ♦ I live in a new housing development where there are young families with kids and they leave Farmington to go out to eat.
- ♦ We would need to put in more time and advertising to make it work.

There are differing opinions as to what Downtown Farmington needs in the way of new retail businesses. However, the consensus was: Farmington needs to increase its retail offerings and to fill the vacant retail spaces in downtown.

Retail Sales Trends Since 2002

Nine of the 16 respondents have seen increases in their sales since 2002. The extent of the increases ranged between 6 and 40 percent, with some of the respondents stating only "steady increases" as the amount. None of the respondents reported decreasing sales; however, one retailer said their sales were flat due to big box retailer competition. Three of the respondents felt that their sales were up due to their level of customer service. Other reasons for increased sales included:

- Hard work and marketing
- Offering more products
- More population, new customers
- Being competitive
- Remodel my store in late 90s
- The adjacent vacant spaces filled, creating more foot traffic
- Moved into a larger store
- Good relationships with customers and business customers
- New ownership. Being more consistent than the last owner
- Our Lakeville competitor closed

Plans for Changes to Business Within Next Three Years

Most respondents seemed to be uncertain about making changes in the near future. However, four of the respondents suggested that they would like to grow their business, but it seemed uncertain that they would expand in Farmington. Other responses included:

♦ "I'd like to open another location near Apple Valley. It's hard to get people to come to Farmington."

♦ "If nothing goes in next door, I would like to increase my space by adding 2,000 square feet for classrooms."

♦ "I'm trying to get a store near a strip mall with a sit down restaurant. People are going to Apple Valley for restaurants."

♦ "Maybe another location."

Four of the respondents didn't have plans to change anything; others will be implementing the following:

- Add equipment and classes
- New carpet
- A drive-thru is a possibility
- Promote wedding flowers – which has increased

Changes That Would Improve Their Business

When asked what could be done to improve their business, respondents had varying responses:

- A new location.
- A place to sit outside, like the gazebo.
- Adding space.
- Building standards for all owners – make downtown more inviting. Property owners downtown need to fix up and modernize buildings – they need to take more pride in their property.
- The city should back promotion of downtown.
- Downtown events to sponsor (live music) on a regular basis.
- Farmington has become more of a bedroom community. People shop outside of city on the way to and from work.
- More business meetings and special events like weddings.
- More businesses downtown.
- More consistency on city programs. Signage is an issue, not consistent because some are allowed to put signs up and some are not.
- More money! I would hire more help.
- Need new business owners, some have been here a long time and resist change.
- New housing downtown. Look at areas like Red Wing, which is reviving their downtown.
- We would like a stop light on the corner of County Road 66 and TH-3, or a road connecting County Road 66 to Pilot Knob.
- The city needs to work with the community to make sure good retail, home ownership and commercial growth occur.

Changes That Would Improve Retail Business <u>for All Retailers</u>

On a broader scope, respondents were asked for ideas for changes that would improve the general state of Downtown Farmington retail for all area retailers. Improving store appearance, updating retail stores and filling vacancies were the most mentioned suggestions. Other suggestions offered multiple times by respondents were: we need more parking, more retail, more specialty shops and more variety. They also wanted to see advertising and promotion of businesses and a way to create a reason to shop downtown. Other suggestions included:

- We need a downtown merchants association.
- Fix the roads.
- Involve community more. People need to support local businesses.

- Keep the small town feel. Work together as a community.
- More advertising by the stores, people don't seem to be aware of what's downtown.
- Not be exclusive, be inclusive. Wouldn't focus on what is wrong downtown.
- People are walking all over down here on weekends and there's no place to stop and browse, no toys, games, fun stuff to buy!
- Reinvesting in business.
- There is nothing cute about it.

As a final question, we asked the business owners for their comments and questions. Respondent volunteered verbatim responses are reported below:

- I have awesome customers. Would like more support from the city. I think maybe they don't know how or what to do to help business owners. Problems with newer families and businesses that won't change and older residents and business owners who don't.
- I do go to Econofoods and Subway; otherwise, I don't even go downtown for anything.
- Need venue or events to bring people into downtown. People come in for fair, school events, not much else.
- It's been interesting! Like to see more foot traffic. City park for people to linger and sit. More reasons for people to come downtown.
- Couple of days before parade, they switched the route and some of the owners had advertised sidewalk sale.
- Two buildings owned by wealthy people who don't care if they rent or not leaves vacancies in downtown.
- I believe in downtown concept, we are sitting on a potential gold mine.
- I like downtown.
- Building owners say "no" to people who are interested, landowners are deciding who should do business but have no expertise.
- Tae Kwon Do needs a bigger space, but people won't rent to him. He has a huge growing business and needs more space.
- Town is split and bigger and getting spread out. If we were on Pilot Knob, it would be busier and more exposure. There are some people that don't know we are here.
- Get the residents comments about what they want.
- Population dictates retail growth.
- I like doing business in Farmington.

Summary

The purpose of this survey was to determine the respondent's opinions and perceptions of being a business owner in Downtown Farmington. Responses show some discontent with the current state of retail in Downtown Farmington, focusing on the lack of retail choices. Since Farmington's retail and new residential development is occurring northwest of downtown Farmington, it may become more challenging to attract new and existing residents into the downtown area. Increasing downtown retail venues will help maintain existing patronage and also attract new residents to Downtown Farmington.

Chapter V

RESIDENTIAL GROWTH TRENDS

Farmington and its trade areas are part of the south metropolitan growth corridor, which extends south from the Twin Cities and includes portions of Dakota, Hennepin, Scott, Rice and Goodhue Counties. This growth corridor is served by two interstates: I-35W and I-35E, and three highways: Cedar Avenue, TH-52, and CSAH 42.

The south corridor communities contained in the Farmington trade area experienced an annual population growth rate of 5.92 percent between 1990 and 2000, as shown in Table 8. This was an increase from a 4.66 percent annual growth rate in the previous decade. Since 2000, the growth rate has decreased to 3.88 percent. Overall, population in the south growth corridor trade area communities grew from 32,023 in 1990 to 71,536 in 2006, an increase of 39,513 people. Trade area communities with the largest population growth rates between 2000 and 2006 include Hampton with a 9.59 percent growth rate and Farmington with a 5.95 percent growth rate.

Table 8

FARMINGTON TRADE AREA COMMUNITIES
SOUTH GROWTH CORRIDOR POPULATION: 1970 TO 2006

						Growth Rate			
Community	1970	1980	1990	2000	2006	1970-80	1980-90	1990-00	2000-06
Farmington	3,104	4,370	5,940	12,365	17,495	3.48 %	3.12 %	7.61 %	5.95 %
Lakeville	7,556	14,790	24,854	43,128	52,323	6.95	5.33	5.67	3.27
Hampton	369	299	363	434	752	(2.08)	1.96	1.80	9.59
Hampton Township	595	848	866	986	966	3.61	0.21	1.31	(0.34)
Total	11,624	20,307	32,023	56,913	71,536	5.74 %	4.66 %	5.92 %	3.88 %

Source: U.S. Census, State of Minnesota Administration Department and McComb Group, Ltd.

Trade area communities of Farmington and Lakeville have recorded high household growth rates over the last three decades, as shown in Table 9. During the eighties, Lakeville and Farmington experienced annual household growth rates of 6.11 percent and 3.17 percent, respectively. Over the following ten years, Farmington's household growth rate increased to 7.28 percent, while Lakeville's growth rate decreased to 5.66 percent. Farmington's household growth rate is expected to increase to 7.34 percent between 2000 and 2006. It is estimated that between 2000 and 2006, the City of Hampton will have an annual household growth rate of 7.89 percent, increasing their households from 156 in 2000 to 246 in 2006. Since 1980, Farmington's household growth rate has increased while Lakeville's has declined.

Table 9

FARMINGTON TRADE AREA COMMUNITIES
SOUTH GROWTH CORRIDOR HOUSEHOLDS: 1970 TO 2006

						Growth Rate			
Community	1970	1980	1990	2000	2006	1970-80	1980-90	1990-00	2000-06
Farmington	1,054	1,511	2,064	4,169	6,378	3.67 %	3.17 %	7.28 %	7.34 %
Lakeville	1,883	4,337	7,851	13,609	17,193	8.70	6.11	5.66	3.97
Hampton	103	101	118	156	246	(0.20)	1.57	2.83	7.89
Hampton Township	126	223	260	320	324	5.88	1.55	2.10	0.21
Total	3,166	6,172	10,293	18,254	24,141	6.90 %	5.25 %	5.90 %	4.77 %

Source: U.S. Census, State of Minnesota Administration Department and McComb Group, Ltd.

Household growth rates in the trade area communities have consistently been above the growth rates of Dakota County, the south growth corridor, the Metropolitan Area, Minneapolis-St. Paul Metropolitan Statistical Average (MSA), and Minnesota as shown in Table 10.

Table 10

TRADE AREA COMMUNITIES, SOUTH GROWTH CORRIDOR, DAKOTA COUNTY, METROPOLITAN AREA, MSA AND MINNESOTA
HOUSEHOLD GROWTH; 1970 TO 2006

	1970	1980	1990	2000	2006	Growth Rate 1970-80	1980-90	1990-00	2000-06
Trade Area Communities	3,166	6,172	10,293	18,254	24,141	6.90 %	5.25 %	5.90 %	4.77 %
South Growth Corridor	70,060	100,075	134,141	166,911	182,926	3.63	2.97	2.21	1.54
Dakota County	37,590	64,087	98,293	131,151	147,824	5.48	4.37	2.93	2.01
Metropolitan Area	571,207	721,444	875,504	1,021,454	1,109,836	2.36	1.95	1.55	1.39
MSA	616,329	788,675	960,170	1,136,615	NA	2.50	1.99	1.70	NA
Minnesota	1,143,473	1,445,222	1,647,853	1,895,127	2,061,551	2.37	1.32	1.41	1.41

Source: Minnesota Department of Administration, U.S. Census, Scan/US and McComb Group, Ltd.

Building Permits

Building permits for the south growth corridor communities for the period 1990 to 2006 are compared to the seven-county metropolitan area in Table 11. A total of 264,453 new construction residential building permits were issued in the seven-county metro area between 1990 and 2006. Annual building permits ranged from a low of 11,514 in 2005 to a high of 20,973 in 2003. The average was 15,556 for the 16-year period.

Table 11

SOUTH GROWTH CORRIDOR AND FARMINGTON TRADE AREA COMMUNITIES
RESIDENTIAL BUILDING PERMITS; 1990 TO 2006

		South Growth Corridor		Trade Area Communities	
Year	Metro Area	Building Permits	Market Share	Market Share	Building Permits
1990	13,340	2,900	21.74 %	5.66 %	164
1991	12,060	3,223	26.72	5.37	173
1992	15,632	3,715	23.77	5.30	197
1993	15,882	3,688	23.22	6.40	236
1994	14,205	3,465	24.39	11.69	405
1995	13,956	3,285	23.54	13.09	430
1996	14,098	3,362	23.85	13.12	441
1997	13,234	2,728	20.61	12.94	353
1998	15,817	3,228	20.41	11.56	373
1999	17,679	3,444	19.48	12.40	427
2000	17,050	3,345	19.62	12.80	428
2001	16,788	2,801	16.68	16.78	470
2002	19,782	3,194	16.15	14.75	471
2003	20,973	4,578	21.83	14.57	667
2004	19,832	3,949	19.91	9.75	385
2005	11,514	2,676	23.24	11.62	311
2006*	12,611	1,496	11.86	18.85	282
Total	264,453	55,077	20.83 %	11.28 %	6,213

*Preliminary Data.
Source: U.S. Census and McComb Group, Ltd.

South growth corridor market share of the seven-county metro area has averaged about 21.0 percent. During the period of 1990 to 2006, the highest south growth corridor market share was

26.72 in 1991. Since then, the market share has fluctuated; however, in 2006 based on preliminary data, it fell to 11.86 percent, which coincides with the recent housing slump. Trade area communities captured 6,213 building permits or 11.28 percent of the south growth corridor growth during the past 16 years.

Trade area communities' market share of south growth corridor permits increased from 5.66 percent in 1990 to 13.12 percent in 1997 and fluctuated up and down until it reached 14.57 percent in 2003. Trade area communities market share dropped to 9.75 percent in 2004; however building permit market share rebounded to 18.85 percent by 2006. Although the trade area communities' market share of building permits has experienced 16 years of ups and downs, it has averaged 11.56 percent over the 16-year period. The average over the last five years was 13.9 percent.

Future Trade Area Households

Household growth projections from 2006 to 2030 for Downtown Farmington trade area are based on estimated south growth corridor communities' future residential market share of the seven-county metropolitan area contained in Table 12.

Table 12

FARMINGTON TRADE AREA
HOUSEHOLD PROJECTIONS; 2006 TO 2030
METRO AREA AND TRADE AREA

			South Growth Corridor			
	7-County Metro Area		Market Share	Trade Area		Trade Area
Year	Households	Increase	@ 20%	Percent	Households	Households
2006	1,134,819					10,675
2007	1,151,841	17,022	3,404	13.5 %	460	11,135
2008	1,169,119	17,278	3,456	13.5	466	11,601
2009	1,186,656	17,537	3,507	13.5	473	12,075
2010	1,204,456	17,800	3,560	13.5	481	12,555
2011	1,222,522	18,067	3,613	13.5	488	13,043
2012	1,240,860	18,338	3,668	13.0	477	13,520
2013	1,259,473	18,613	3,723	13.0	484	14,004
2014	1,278,365	18,892	3,778	13.0	491	14,495
2015	1,297,541	19,175	3,835	13.0	499	14,993
2016	1,317,004	19,463	3,893	13.0	506	15,500
2017	1,336,759	19,755	3,951	12.5	494	15,993
2018	1,356,810	20,051	4,010	12.5	501	16,495
2019	1,377,162	20,352	4,070	12.5	509	17,003
2020	1,397,820	20,657	4,131	12.5	516	17,520
2021	1,418,787	20,967	4,193	12.5	524	18,044
2022	1,440,069	21,282	4,256	12.0	511	18,555
2023	1,461,670	21,601	4,320	12.0	518	19,073
2024	1,483,595	21,925	4,385	12.0	526	19,599
2025	1,505,849	22,254	4,451	12.0	534	20,134
2026	1,528,437	22,588	4,518	11.5	520	20,653
2027	1,551,363	22,927	4,585	11.5	527	21,180
2028	1,574,634	23,270	4,654	11.5	535	21,716
2029	1,598,253	23,620	4,724	11.5	543	22,259
2030	1,622,227	23,974	4,795	11.5 %	551	22,810
Total		487,408	97,482		12,135	

Source: McComb Group, Ltd.

Households in the seven-county metropolitan area are estimated to increase at 1.5 percent over the next 25 years, a growth rate similar to the past ten years. At this rate, the Metropolitan Area would add about 487,408 homes by 2030. Assuming that the south growth corridor will capture 20 percent of the increase, similar to the past, the estimated household growth would be about 97,482 households. Trade area communities are estimated to capture a declining percentage of new households in the next 25 years. During this period, the percentage of new households in trade area communities is estimated to decline gradually from 13.5 percent in 2007 to 11.5 percent in 2030. In 2006, Downtown trade area households were 10,675. The Downtown trade area is expected to capture an average of 12.5 percent of the south growth corridor growth over the next 25 years, bringing the Downtown trade area households to a total of 22,810 by 2030 assuming the urban services will be available to support that growth.

Chapter VI

FARMINGTON TRADE AREAS

Two trade areas, shown on Map 3, were delineated for retail locations in Farmington: Downtown and Marketplace. These trade areas were delineated by McComb Group based on the location of competitive shopping areas, arterial road network, natural boundaries, previous experience and also utilizing data from the Farmington customer survey.

Downtown Farmington is the largest of the two trade areas; it extends north to 160th Street, west to Highview Avenue, south to 280th Street and east to Hampton or TH-52. The Downtown trade area includes the Cities of Farmington, Hampton and portions of northeast and southeast Lakeville.

The Marketplace trade area is much smaller than the Downtown trade area and is bounded by 160th Street to the north, Farmington city limits to the west, and TH-3 to the east, the southern boundary falls about a half mile north of CSAH 50. This trade area includes the northern half of Farmington and the northeast corner of Lakeville.

Population and Households

Population and household growth trends in Farmington's two trade areas and the Minneapolis-St. Paul MSA are shown in Table 13. The Marketplace trade area includes the majority of the new residential development within Farmington. This trade area has been growing at a faster rate than either the Downtown trade area or Minneapolis-St. Paul MSA.

Table 13

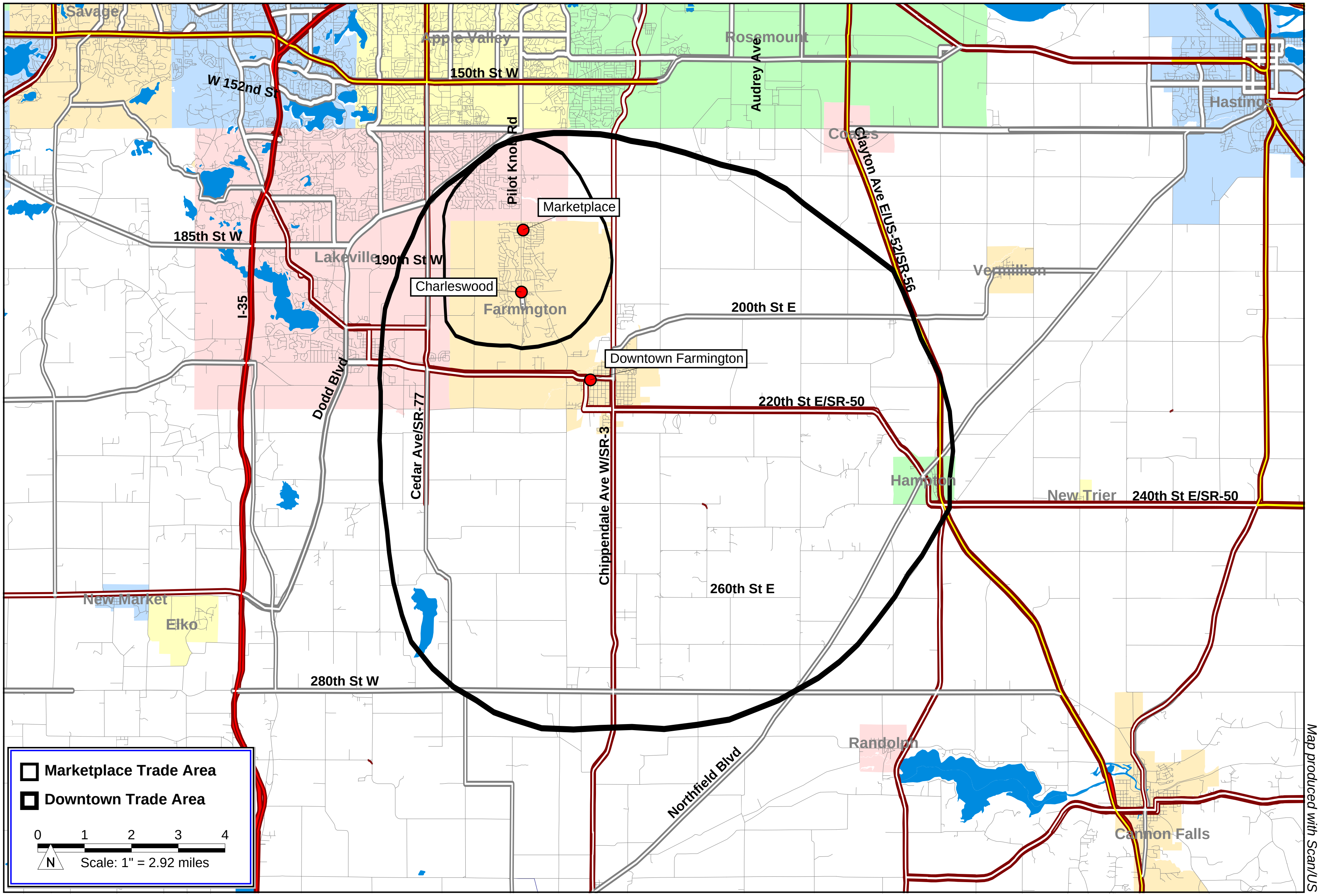
DOWNTOWN AND MARKETPLACE TRADE AREAS, AND MINNEAPOLIS-ST. PAUL MSA
POPULATION AND HOUSEHOLDS
1990 AND 2000 CENSUS; 2006 AND 2011 ESTIMATED

	Downtown Trade Area	Marketplace Trade Area	Minneapolis-St. Paul MSA
Population			
1990	14,501	4,857	2,537,677
2000	24,100	12,700	2,968,806
2006E	29,971	16,479	3,183,477
2011E	34,906	19,521	3,351,906
Annual Growth Rate			
1990-2000	5.21 %	10.09 %	1.58 %
2000-2006E	3.70	4.44	1.17
2006E-2011E	3.10	3.45	1.04
Households			
1990	4,812	1,485	959,070
2000	8,062	3,944	1,136,615
2006E	10,675	5,479	1,294,208
2011E	13,043	6,819	1,422,203
Annual Growth Rate			
1990-2000	5.30 %	10.26 %	1.71 %
2000-2006E	4.79	5.63	2.19
2006E-2011E	4.09	4.47	1.90

E: Estimated.
Source: U.S. Census, Scan/US, Inc. and McComb Group, Ltd.

Map 3

FARMINGTON TRADE AREAS



10/09/07

Marketplace trade area population increased at a rate of 10.09 percent from 4,857 people in 1990 to 12,700 in 2000. Trade area population slowed to 4.44 percent between 2000 and 2006, and is estimated to increase at a rate of 3.45 percent to 19,521 by 2011. Household growth has been more rapid than population, increasing at a rate of 10.26 percent between 1990 and 2000 and 5.63 percent from 2000 to 2006. Households are estimated to increase from 5,479 in 2006 to 6,819 by 2011, an annual growth rate of 4.47 percent. The rapid growth in population and households during the 1990 to 2000 decade is a result of new housing development in this area.

Downtown trade area population and households are also increasing, however, at a much slower rate. Between 1990 and 2000, trade area population increased from 14,501 in 1990 to 24,100 in 2000, a growth rate of 5.21 percent. Over the next six years, population increased at an annual growth rate of 3.70 percent, increasing the trade area population to 29,971 in 2006. By 2011, Downtown trade area population is estimated to increase to 34,906. Downtown trade area households have been increasing at similar rates. Trade area households totaled 4,812 in 1990 and increased to 8,062 by 2000, an annual increase of 5.30 percent. In 2006, the estimated number of households was 10,675 and is estimated to increase to 13,043 by 2011, an increase of 4.09 percent annually.

Household density for the Farmington trade areas is shown on Map 4. Household density is generally higher in the Marketplace trade area. Household density tends to drop west, south and east of Farmington with clusters of household density around the central core of Farmington and also around Pilot Knob Road located northwest of Downtown Farmington.

Household Income

Average household income in the Marketplace trade area is higher than both the Downtown trade area and the Minneapolis-St. Paul MSA, as shown in Table 14. Average household income in 2006 in the Marketplace trade area was $90,901 compared to $79,803 in the Downtown trade area and $76,477 in the Minneapolis-St. Paul MSA. It is estimated that the average household incomes for these three areas will continue to increase through 2011.

Table 14

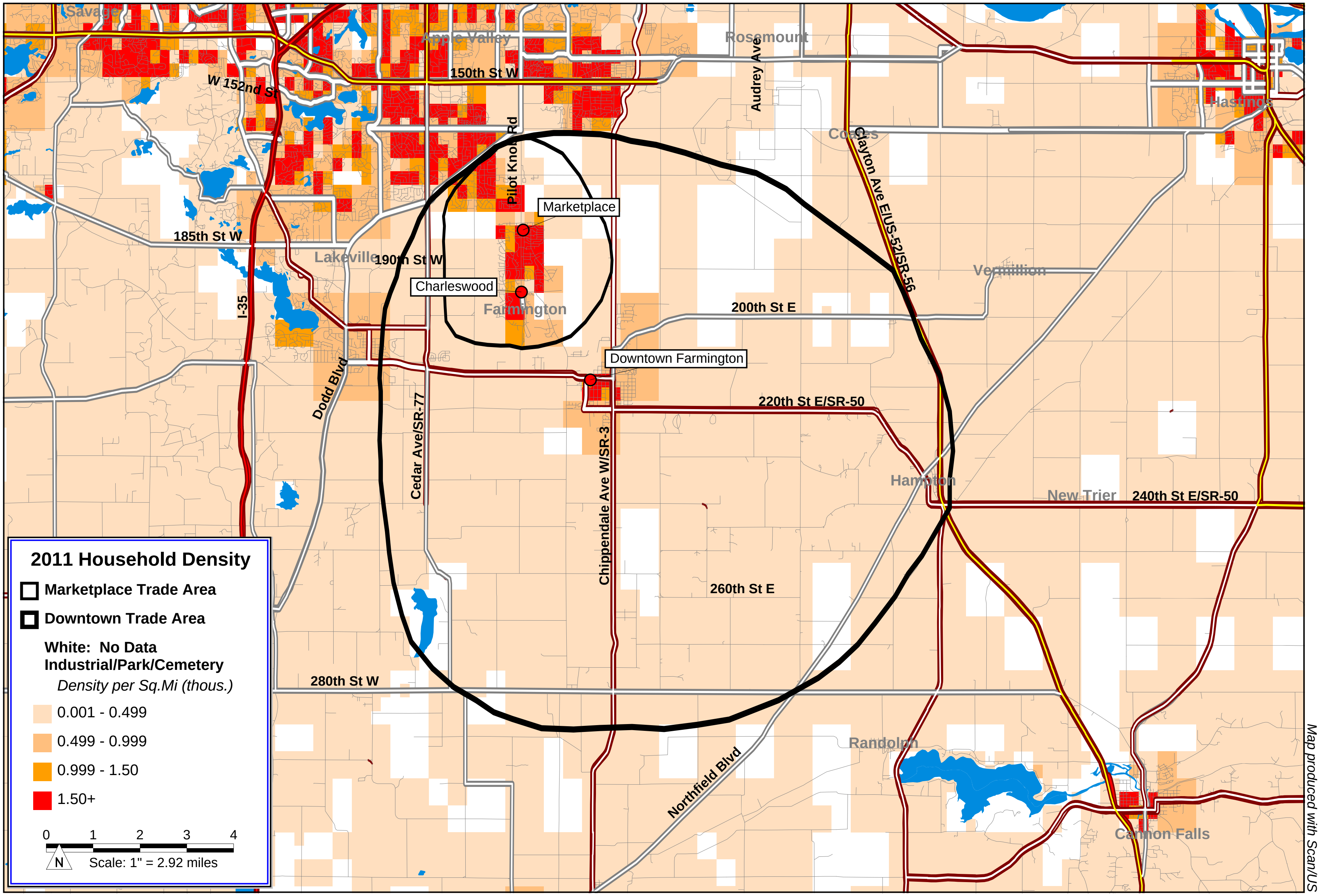
DOWNTOWN AND MARKETPLACE TRADE AREAS, AND MINNEAPOLIS-ST. PAUL MSA
AVERAGE AND MEDIAN HOUSEHOLD INCOME
1990 AND 2000 CENSUS; 2006 AND 2011 ESTIMATED

	Downtown Trade Area	Marketplace Trade Area	Minneapolis-St. Paul MSA
Average Household Income			
1990	$ 42,036	$ 45,446	$ 43,726
2000	69,085	76,951	67,713
2006E	79,803	90,901	76,477
2011E	86,636	99,049	82,628
Median Household Income			
1990	$ 38,150	$ 43,250	$ 37,650
2000	61,343	66,887	54,601
2006E	69,693	75,497	62,601
2011E	76,059	81,989	68,762

E: Estimated.
Source: McComb Group, Ltd.

Map 4

FARMINGTON TRADE AREAS AND 2011 HOUSEHOLD DENSITY



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The Farmington trade areas proportion of households with incomes above $75,000, $100,000 and $150,000 are shown in Table 15. In 2006, households with incomes above $75,000 were 52.9 percent in the Marketplace trade area and 45.9 percent in the Downtown trade area. Households with incomes above $100,000 in 2006 were 24.5 percent in the Marketplace trade area and 21.3 percent in the Downtown trade area. This data is also shown in Table 16, with actual household counts for each income category.

Table 15

DOWNTOWN AND MARKETPLACE TRADE AREAS, AND MINNEAPOLIS-ST. PAUL MSA
HOUSEHOLD INCOME DISTRIBUTION: 1990 AND 2000 CENSUS; 2006 AND 2011 ESTIMATED

	Downtown Trade Area	Marketplace Trade Area	Minneapolis-St. Paul MSA
Households above $75,000			
1990	7.0 %	6.7 %	11.2 %
2000	32.0	36.2	31.5
2006E	45.9	52.9	39.7
2011E	54.2	61.8	45.0
Households above $100,000			
1990	1.4 %	1.5 %	5.0 %
2000	12.5	14.6	16.9
2006E	21.3	24.5	23.8
2011E	27.7	31.4	28.6
Households above $150,000			
1990	0.4 %	0.2 %	1.8 %
2000	2.6	3.4	5.9
2006E	5.0	6.4	8.5
2011E	6.9	8.9	10.9

E: Estimated.
Source: McComb Group, Ltd.

Table 16

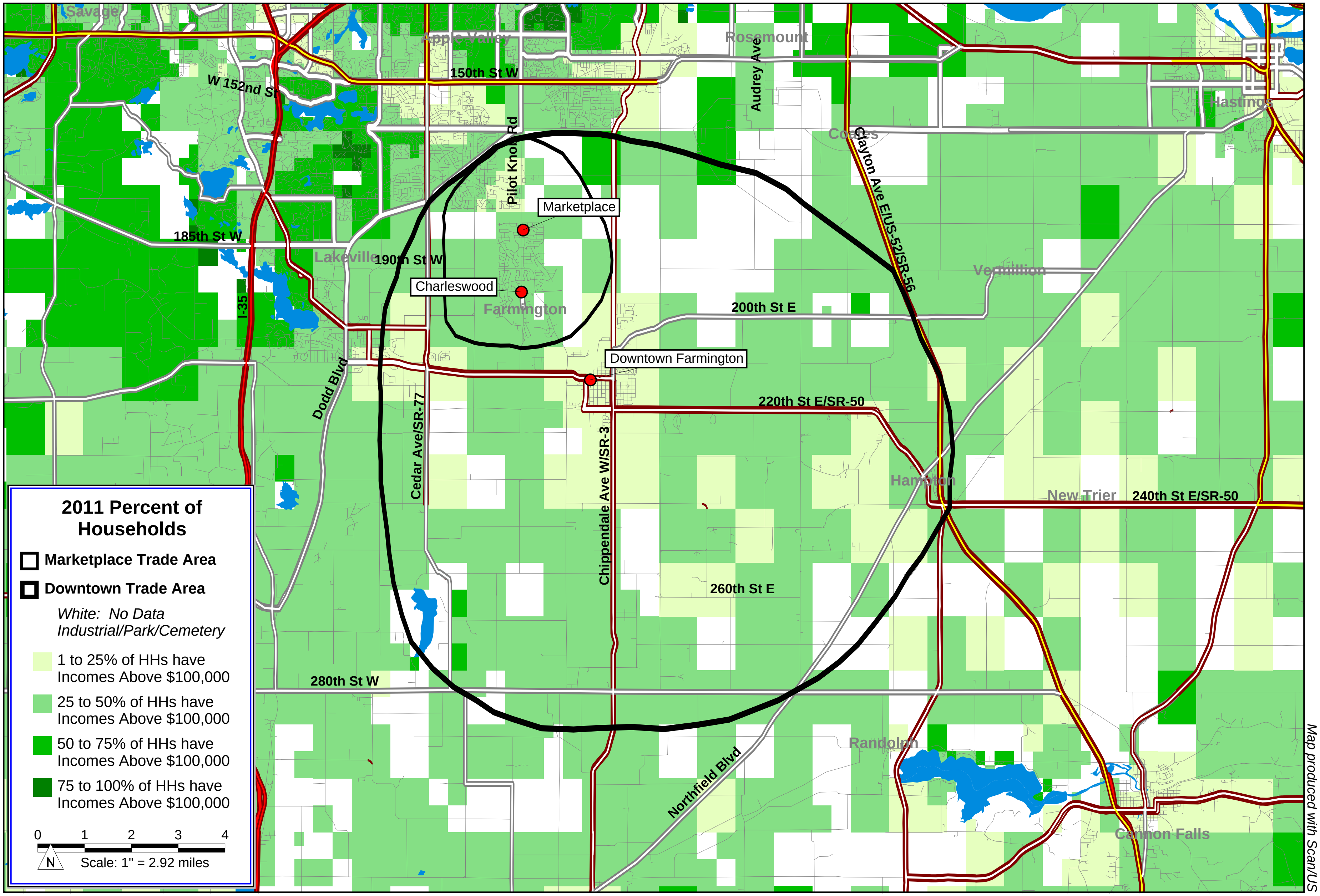
DOWNTOWN AND MARKETPLACE TRADE AREAS, AND MINNEAPOLIS-ST. PAUL MSA
HOUSEHOLD INCOME DISTRIBUTION: 1990 AND 2000 CENSUS; 2006 AND 2011 ESTIMATED

	Downtown Trade Area	Marketplace Trade Area	Minneapolis-St. Paul MSA
Households above $75,000			
1990	333	99	107,670
2000	2,582	1,429	357,670
2006E	4,903	2,898	513,201
2011E	7,063	4,212	639,773
Households above $100,000			
1990	67	23	47,903
2000	1,005	577	192,041
2006E	2,275	1,340	308,112
2011E	3,619	2,141	406,108
Households above $150,000			
1990	20	3	17,256
2000	214	136	67,087
2006E	533	351	110,253
2011E	899	607	154,552

E: Estimated.
Source: McComb Group, Ltd.

Map 5

FARMINGTON TRADE AREAS 2011 HOUSEHOLD INCOME: PERCENT ABOVE $100,000



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Distribution of households with incomes above $100,000 is shown on Map 5. This map demonstrates that the more affluent households are distributed northwest of Farmington's trade areas.

Demographic Characteristics

Demographic characteristics for Downtown and Marketplace trade areas, and Minneapolis-St. Paul MSA are summarized in the demographic snapshots contained in Tables 17, 18 and 19. These snapshots contain census data for 1990 and 2000, as well as estimates for 2006 and 2011. These estimates were provided by Scan/US, Inc., a source of demographic information. Significant characteristics of Farmington's trade areas include the following:

- ♦ Marketplace trade area average household size of 3.01 in 2006 and 2.86 in 2011 is higher than the average household size of the Downtown trade area (2.80 in 2006 and 2.67 in 2011) and the Minneapolis-St. Paul MSA (2.41 in 2006 and 2.31 in 2011).

- ♦ The Downtown trade area has a higher median age of 32 in 2006 and 33 in 2011 than the Marketplace trade area of 29 in 2006 and 20 in 2011.

- ♦ Households with children under the age of 19 are more prevalent in the Marketplace trade area than the Downtown trade area. In 2006, 36.9 percent of the population in the Marketplace trade area was under 19, compared to 34.0 percent in the Downtown trade area. These percentages are expected to drop slightly in 2011 in all trade areas.

- ♦ The Downtown trade area has an older population than the Marketplace trade area. In 2006, 6.1 percent of the population in the Downtown trade area was over the age of 65, while the Marketplace trade area had 2.5 percent of the population in this age category. It is expected that these percentages will increase slightly by 2011 for all trade areas.

Additional demographic characteristics are contained in Appendix B.

Purchasing Power

Retail sales potential for Farmington trade areas is based on estimated purchasing power and market share that can be achieved from the trade areas. Retail sales from residents living outside the trade areas are inflow sales. Purchasing power estimates of trade area residents are derived from retail sales by store type as reported by the Census of Retail Trade in 1997 and 2002. Retail sales for 2003 through 2006 were estimated using information available from the U.S. Department of Commerce. Future purchasing power estimates are expressed in constant 2007 dollars and reflect projected household growth. Household growth is based on the analysis described earlier in this chapter.

Purchasing power is based on the number of trade area households adjusted to reflect income characteristics. Purchasing power, for the purpose of this analysis, includes retail categories that are characteristic of tenants that could be located in Farmington. Estimated retail purchasing power summary tables for the Farmington trade areas for 2010, 2015, 2020, 2025 and 2030 are shown in Table 20. The purchasing power estimates used in this analysis are condensed from the full purchasing power tables, which are contained in a separate Appendix. These estimates

Table 17

McComb Group, Ltd.

DEMOGRAPHIC AND INCOME SNAPSHOT

Downtown Farmington Trade Area 11/27/2007

SNAPSHOT	1990 Census	2000 Census	2006 Estimated	2011 Projected
Population	14,501	24,100	29,971	34,906
Households	4,812	8,062	10,675	13,043
Families	3,808	6,367	8,329	10,009
Per Capita Income	$ 13,930	$ 23,220	$ 28,575	$ 32,505
Median Household Income	$ 38,150	$ 61,343	$ 69,693	$ 76,059
Average Household Income	$ 42,036	$ 69,085	$ 79,803	$ 86,636
Average Household Size	3.00	2.98	2.80	2.67
Median Age	29	31	32	33

	Annual Percent Change		
TRENDS	1990 - 2000	2000 - 2006	2006 - 2011
Population	5.21 %	3.70 %	3.10 %
Households	5.30	4.79	4.09
Families	5.28	4.58	3.74
Median Household Income	4.86	2.15	1.76
Average Household Income	5.09	2.43	1.66

	1990 Census		2000 Census		2006 Estimated		2011 Projected	
HOUSEHOLDS BY INCOME	Number	Percent	Number	Percent	Number	Percent	Number	Percent
Less than $15,000	539	11.3 %	377	4.7 %	383	3.6 %	412	3.2 %
$15,000 - $24,999	610	12.8	415	5.1	457	4.3	509	3.9
$25,000 - $34,999	831	17.4	716	8.9	675	6.3	727	5.6
$35,000 - $49,999	1,385	29.0	1,137	14.1	1,193	11.2	1,240	9.5
$50,000 - $74,999	1,075	22.5	2,835	35.2	3,065	28.7	3,091	23.7
$75,000 - $99,999	267	5.6	1,577	19.6	2,628	24.6	3,444	26.4
$100,000 - $149,999	46	1.0	791	9.8	1,742	16.3	2,719	20.9
$150,000 +	20	0.4	214	2.6	533	5.0	899	6.9
POPULATION BY AGE	Number	Percent	Number	Percent	Number	Percent	Number	Percent
<19	5,260	36.3 %	8,751	36.3 %	10,183	34.0 %	11,284	32.3 %
20-24	839	5.8	1,082	4.5	1,760	5.9	2,246	6.4
25-34	3,237	22.3	4,868	20.2	5,347	17.8	5,952	17.1
35-44	2,207	15.2	4,738	19.7	5,119	17.1	5,092	14.6
45-54	1,230	8.5	2,346	9.7	3,558	11.9	4,450	12.7
55-64	741	5.1	1,157	4.8	2,202	7.3	3,263	9.3
65-74	528	3.6	596	2.5	945	3.2	1,507	4.3
75-84	449	3.1	379	1.6	541	1.8	714	2.0
85+	NA	NA	184	0.8	315	1.1	396	1.1
RACE AND ETHNICITY	Number	Percent	Number	Percent	Number	Percent	Number	Percent
White	14,235	98.2 %	22,922	95.1 %	28,072	93.7 %	32,178	92.2 %
Black	91	0.6	195	0.8	339	1.1	590	1.7
Native American	57	0.4	91	0.4	83	0.3	85	0.2
Asian/Pacific Islander	87	0.6	427	1.8	774	2.6	1,208	3.5
Other Races	30	0.2	465	1.9	703	2.3	846	2.4
Hispanic (Any Race)	81	0.6	459	1.9	810	2.7	1,137	3.3

Source: U.S. Census, Scan/US, Inc. and McComb Group, Ltd.

Table 18

McComb Group, Ltd.

DEMOGRAPHIC AND INCOME SNAPSHOT

Marketplace Trade Area 11/27/2007

SNAPSHOT	1990 Census	2000 Census	2006 Estimated	2011 Projected
Population	4,857	12,700	16,479	19,521
Households	1,485	3,944	5,479	6,819
Families	1,281	3,391	4,625	5,659
Per Capita Income	$ 13,829	$ 23,958	$ 30,287	$ 34,674
Median Household Income	$ 43,250	$ 66,887	$ 75,497	$ 81,989
Average Household Income	$ 45,446	$ 76,951	$ 90,901	$ 99,049
Average Household Size	3.27	3.22	3.01	2.86
Median Age	26	29	29	30

TRENDS	Annual Percent Change 1990 - 2000	2000 - 2006	2006 - 2011
Population	10.09 %	4.44 %	3.45 %
Households	10.26	5.63	4.47
Families	10.22	5.31	4.12
Median Household Income	4.46	2.04	1.66
Average Household Income	5.41	2.82	1.73

	1990 Census		2000 Census		2006 Estimated		2011 Projected	
HOUSEHOLDS BY INCOME	Number	Percent	Number	Percent	Number	Percent	Number	Percent
Less than $15,000	53	3.6 %	60	1.5 %	52	1.0 %	59	0.9 %
$15,000 - $24,999	122	8.2	82	2.1	135	2.5	167	2.4
$25,000 - $34,999	259	17.4	273	6.9	230	4.2	223	3.3
$35,000 - $49,999	564	38.0	483	12.2	539	9.8	572	8.4
$50,000 - $74,999	388	26.1	1,616	41.0	1,624	29.6	1,586	23.3
$75,000 - $99,999	77	5.2	853	21.6	1,558	28.4	2,071	30.4
$100,000 - $149,999	20	1.3	441	11.2	989	18.1	1,533	22.5
$150,000 +	3	0.2	136	3.4	351	6.4	607	8.9

POPULATION BY AGE	Number	Percent	Number	Percent	Number	Percent	Number	Percent
<19	1,976	40.8 %	4,984	39.2 %	6,082	36.9 %	6,881	35.3 %
20-24	256	5.3	474	3.7	859	5.2	1,146	5.9
25-34	1,421	29.3	3,171	25.0	3,501	21.2	3,894	19.9
35-44	780	16.1	2,672	21.0	3,054	18.5	3,129	16.0
45-54	250	5.2	940	7.4	1,710	10.4	2,299	11.8
55-64	95	2.0	334	2.6	864	5.2	1,417	7.3
65-74	51	1.1	83	0.7	274	1.7	525	2.7
75-84	19	0.4	31	0.2	106	0.6	179	0.9
85+	NA	NA	11	0.1	29	0.2	51	0.3

RACE AND ETHNICITY	Number	Percent	Number	Percent	Number	Percent	Number	Percent
White	4,725	97.3 %	11,953	94.1 %	15,275	92.7 %	17,878	91.6 %
Black	56	1.2	127	1.0	210	1.3	351	1.8
Native American	32	0.7	56	0.4	47	0.3	48	0.2
Asian/Pacific Islander	32	0.7	326	2.6	571	3.5	845	4.3
Other Races	13	0.3	237	1.9	377	2.3	399	2.0
Hispanic (Any Race)	35	0.7	222	1.7	414	2.5	590	3.0

Source: U.S. Census, Scan/US, Inc. and McComb Group, Ltd.

Table 19

McComb Group, Ltd.

DEMOGRAPHIC AND INCOME SNAPSHOT

Minneapolis-St. Paul MSA 11/27/2007

SNAPSHOT	1990 Census	2000 Census	2006 Estimated	2011 Projected
Population	2,537,677	2,968,806	3,183,477	3,351,906
Households	959,070	1,136,615	1,294,208	1,422,203
Families	648,159	744,303	850,619	937,431
Per Capita Income	$ 16,667	$ 26,641	$ 31,907	$ 35,977
Median Household Income	$ 37,650	$ 54,601	$ 62,601	$ 68,762
Average Household Income	$ 43,726	$ 67,713	$ 76,477	$ 82,628
Average Household Size	2.59	2.56	2.41	2.31
Median Age	32	34	36	37

	Annual Percent Change		
TRENDS	1990 - 2000	2000 - 2006	2006 - 2011
Population	1.58 %	1.17 %	1.04 %
Households	1.71	2.19	1.90
Families	1.39	2.25	1.96
Median Household Income	3.79	2.30	1.90
Average Household Income	4.47	2.05	1.56

	1990 Census		2000 Census		2006 Estimated		2011 Projected	
HOUSEHOLDS BY INCOME	Number	Percent	Number	Percent	Number	Percent	Number	Percent
Less than $15,000	158,154	16.5 %	104,519	9.2 %	99,435	7.7 %	99,550	7.0 %
$15,000 - $24,999	145,153	15.2	104,638	9.2	101,157	7.8	100,102	7.0
$25,000 - $34,999	151,215	15.8	125,123	11.0	120,082	9.3	125,439	8.8
$35,000 - $49,999	206,404	21.6	179,335	15.8	178,898	13.8	173,236	12.2
$50,000 - $74,999	188,607	19.7	265,330	23.3	281,435	21.7	284,103	20.0
$75,000 - $99,999	59,767	6.2	165,629	14.6	205,089	15.8	233,665	16.4
$100,000 - $149,999	30,647	3.2	124,954	11.0	197,859	15.3	251,556	17.7
$150,000 +	17,256	1.8	67,087	5.9	110,253	8.5	154,552	10.9

POPULATION BY AGE	Number	Percent	Number	Percent	Number	Percent	Number	Percent
<19	737,005	29.0 %	873,680	29.4 %	885,026	27.8 %	902,003	26.9 %
20-24	193,287	7.6	193,790	6.5	216,341	6.8	227,434	6.8
25-34	510,323	20.1	457,105	15.4	439,470	13.8	434,959	13.0
35-44	414,646	16.3	528,024	17.8	510,905	16.0	477,556	14.2
45-54	252,397	9.9	405,724	13.7	489,259	15.4	528,477	15.8
55-64	180,054	7.1	225,540	7.6	322,787	10.1	407,161	12.1
65-74	138,743	5.5	145,808	4.9	168,199	5.3	219,774	6.6
75-84	111,076	4.4	100,485	3.4	103,852	3.3	108,114	3.2
85+	NA	NA	38,650	1.3	47,638	1.5	46,428	1.4

RACE AND ETHNICITY	Number	Percent	Number	Percent	Number	Percent	Number	Percent
White	2,342,781	92.3 %	2,556,851	86.1 %	2,660,079	83.6 %	2,737,139	81.7 %
Black	90,055	3.5	157,963	5.3	205,332	6.4	243,820	7.3
Native American	24,248	1.0	21,590	0.7	18,686	0.6	16,587	0.5
Asian/Pacific Islander	65,582	2.6	124,025	4.2	171,567	5.4	210,660	6.3
Other Races	15,011	0.6	108,377	3.7	127,813	4.0	143,700	4.3
Hispanic (Any Race)	37,820	1.5	99,121	3.3	145,591	4.6	180,608	5.4

Source: U.S. Census, Scan/US, Inc. and McComb Group, Ltd.

represent the potential dollar sales for a broad range of retail stores generated by residents of each trade area.

Table 20

FARMINGTON TRADE AREAS
RETAIL PURCHASING POWER; 2010 TO 2030
(In Thousands of Constant 2007 Dollars)

Merchandise Category	2010	2015	2020	2025	2030
Downtown Trade Area					
Shopping Goods	$ 132,470	$ 170,762	$ 214,966	$ 266,135	$ 324,813
Food Service & Drinking	49,815	64,214	80,836	100,077	122,145
Convenience Goods	97,515	125,702	158,242	195,910	239,103
Gasoline Service Stations & Convenience	38,205	49,249	61,997	76,754	93,677
Other Stores	156,240	201,402	253,535	313,890	383,096
Total	$ 474,245	$ 611,329	$ 769,576	$ 952,766	$ 1,162,834
Marketplace Trade Area					
Shopping Goods	$ 82,628	$ 115,804	$ 164,060	$ 232,431	$ 329,302
Food Service & Drinking	31,072	43,548	61,695	87,405	123,832
Convenience Goods	60,823	85,246	120,769	171,098	242,405
Gasoline Service Stations & Convenience	23,830	33,398	47,316	67,034	94,971
Other Stores	97,452	136,582	193,499	274,137	388,386
Total	$ 295,805	$ 414,578	$ 587,339	$ 832,105	$ 1,178,896

Source: McComb Group, Ltd.

Total purchasing power for Farmington's Downtown trade area was estimated at $474.2 million in 2010 and is expected to increase to $1.1 billion by 2030, an annual growth rate of 4.6 percent in constant 2007 dollars. Purchasing power for shopping goods in this trade area is expected to increase from $132.5 million in 2010 to $170.8 million in 2015, further increasing to almost $325 million by 2030. Convenience goods purchasing power for this trade area was $97.5 million in 2010, estimated to increase to $125.7 million in 2015 and potentially to over $239 million by 2030.

Farmington's Marketplace trade area purchasing power is increasing at a 7.16 percent annual growth rate, increasing from a total purchasing power of $295.8 million in 2010 to over $1.1 billion by 2030. Shopping goods purchasing power, estimated at $82.6 million in 2010, is anticipated to increase to over $115.8 million in 2015, expanding to over $329.3 million by 2030. Estimates indicate that convenience goods purchasing power was $60.8 million in 2010 and is likely to increase to $85.2 million in 2015. By 2030, convenience goods purchasing power will exceed $242.4 million.

Chapter VII

FARMINGTON RETAIL DEVELOPMENT POTENTIAL

Farmington is updating its comprehensive plan and determining the potential for additional retail development. Factors that support retail and service development in Farmington include:

- Rapid residential growth in Farmington's retail trade areas.
- Downtown trade area households are expected to increase at an annual rate of 4.1 percent between 2006 and 2011.
- Marketplace trade area households are estimated to increase at an annual rate of 4.5 percent between 2006 and 2011.
- Average household income in Farmington trade areas was above the Metropolitan Area average of $76,477 in 2006.
- Downtown Farmington's trade area average households income was $79,803 in 2006.
- Average household income in the Marketplace trade area was even higher at $90,901.

Favorable trade area demographic characteristics will be attractive to retailers that desire to serve Farmington's growing trade area households.

Retail Sales

Future development potential is based on market share that can be achieved by Farmington retail stores taking into consideration trade area households, future growth and potential competitive developments. Market share estimates for Farmington are based on analysis conducted as a part of this engagement, 1997 and 2002 retail and service sales in Farmington and McComb Group's knowledge of the Twin Cities retail market.

Retail sales in Farmington increased from $16.9 million in 1997 to $42.5 million in 2002 according to U.S. Census of Retail Trade, as shown in Table 21. This represented an annual average increase of 20.2 percent. During this same period, the number of retail stores increased from 46 to 67. Retail sales are reported for a limited number of businesses in Farmington. Food service increased from $5.3 million to $10.3 million, an annual growth rate of 14.0 percent. Gasoline/convenience stores increased from $11.6 million to $19.5 million, a growth rate of 10.9 percent. Health care increased at a 17.0 percent annual rate. These are very attractive increases in sales.

Table 21

FARMINGTON RETAIL ESTABLISHMENTS AND SALES: 1997 AND 2002

Store Type	1997 Number	1997 Dollars	2002 Number	2002 Dollars	Growth Rate
CONVENIENCE					
Food Stores	2	D	2	D	
Liquor Stores	1	D	2	$ 2,399	
FOOD SERVICE					
Food services & drinking places	15	$ 5,339	20	$ 10,293	14.0 %
Full service eating places	D	D	3	1,865 E	
Limited service eating places	D	D	17	8,428 E	
GASOLINE/CONVENIENCE					
Gasoline stations	7	$ 11,614	7	$ 19,466	10.9 %
SHOPPING GOODS					
General Merchandise Stores	1	D	1	D	
Clothing and clothing accessories stores	1	D	1	D	
Furniture and home furnishings stores	1	D	2	D	
Electronics and appliance stores	2	D	1	D	
Other Shopping Goods	2	D	3	D	
Building material and garden equipment and supplies dealers	6	D	3	D	
Motor vehicle and parts dealers	5	D	5	D	
TOTAL RETAIL	46	$ 16,953	67	$ 42,451	20.2 %
SERVICES					
Health Care and Social Assistance	13	$ 6,130	11	$ 13,440	17.0 %
Arts, Entertainment and Recreation	3	D	6	D	

D: Suppressed by U.S. Census Bureau.
E: Estimated by McComb Group, Ltd.
Source: U.S. Census Bureau, City of Farmington and McComb Group, Ltd.

Market Share

Market share for Farmington retail and service establishments in 2002 is estimated in Table 22, which also contains Farmington retail and service sales for 2002. Purchasing power was calculated for 2002 by McComb Group. Retail sales derived from Farmington's trade area was estimated for each retail category to determine trade area sales and market share as a percent of purchasing power. Using liquor stores as an example, retail sales at the Downtown store were over $1.1 million with 90 percent of the sales from the primary trade area. This results in trade area sales of $1.0 million, which is 21.4 percent of estimated purchasing power of $4.8 million. Market share for the Marketplace liquor store was 43.6 percent on trade area sales of $1.1 million. Because Marketplace has a smaller trade area it has lower purchasing power, which results in higher market share. Sales of both liquor stores results in combined market share of 44.6 percent. Retail categories with high market share include limited service eating places (65.9 percent), gasoline/convenience (61.3 percent), repair and maintenance (50.5 percent), and health care (46.3 percent).

Table 22

FARMINGTON RETAIL AND SERVICES MARKET SHARE: 2002
(In Thousands of Dollars)

Store Type	Purchasing Power	Retail Sales	Trade Area Percent	Trade Area Sales	Market Share
CONVENIENCE					
Liquor Stores					
Downtown Store	$ 4,845	$ 1,152	90 %	$ 1,037	21.4 %
Marketplace Store	2,576	1,247	90	1,122	43.6
Both Stores	4,845	2,399	90	2,159	44.6
FOOD SERVICE					
Full Service Eating Places	$ 12,991	$ 1,865 E	75 %	$ 1,399	10.8 %
Limited-service eating places	9,586	8,428 E	75	6,321	65.9
GASOLINE/CONVENIENCE					
Gasoline stations	$ 22,237	$ 19,466	70 %	$ 13,626	61.3 %
SERVICES					
Repair & Maintenance	$ 3,808	$ 2,263 E	85 %	$ 1,924	50.5 %
Personal and Laundry	2,466	543 E	90	489	19.8
HEALTH CARE	$ 25,338	$ 13,790 E	85 %	$ 11,722	46.3 %

E: Estimated.
Source: U.S. Census Bureau and McComb Group, Ltd.

The above analysis demonstrates that some Farmington retail and service categories are achieving solid market share performance.

Future retail and service sales potential for Farmington is based on market share that can be achieved taking into consideration past trends in Farmington, trade area households, future growth, and potential competitive developments. Market share estimates are based on analysis conducted as part of this engagement, McComb Group’s knowledge of the Twin Cities area retail market, and assumptions contained in Table 23. Market share was estimated for each retail and service category taking into consideration past market share performance for Farmington retail stores, trade area size, competitive store locations, and industry experience. Trade area market share by store type is shown in Table 23.

Using the convenience goods category as an example, market share is estimated at 20 to 45 percent with 75 to 90 percent of the sales derived from the trade area. Food service market share is estimated at 35 percent for full service restaurants and 65 percent for limited service restaurants with 75 percent of the sales being derived from the trade area. In the shopping goods category, market share ranges from 15 to 20 percent depending on store category. In the shopping goods category, stores are estimated to derive 70 to 75 percent of their sales from the trade area. Market share in services and health care are estimated at 25 and 20 percent, respectively, with 85 percent of the sales from the trade area.

Table 23

CITY OF FARMINGTON
MARKET SHARE AND TRADE AREA SALES

Store Type	Market Share	Trade Area Sales
Convenience Goods		
Supermarkets	35 %	85 %
Other Food Stores	25	90
Drug & Proprietary	45	90
Liquor	25	90
Hardware Stores	35	75
Other Convenience Stores	20	90
Food Service		
Full Service	35 %	75 %
Limited Service	65	75
Gasoline/Convenience Stores	60 %	70 %
Shopping Goods		
General Merchandise	15 %	70 %
Apparel & Accessories	20	75
Furniture & Home Furnishings	20	75
Electronics & Appliances Stores	20	75
Other Shopping Goods	20	75
Other Retail Stores		
Building Materials	35 %	85 %
Auto Parts & Accessories	20	75
Services	25 %	85 %
Health Care	20 %	85 %

Source: McComb Group, Ltd.

Sales Potential

Estimated retail and service space demand is a two-step process. Sales potential for each retail or service category is estimated first to determine if retail sales are sufficient to support a store. Next, store size is determined based on sales productivity and typical store size for each category. This methodology is illustrated for 2010 in Tables 24 and 25. These tables use convenience goods stores as an example to illustrate how supportable square footage of retail stores and services is determined.

Using liquor stores as an example, resident purchasing power in 2010 is estimated at $8.3 million, as shown in Table 24. Market share of 25 percent results in $2.1 million in trade area sales. Adding inflow sales of $367,000, results in total estimated sales of about $2.4 million. Estimated sales potential is about $9.6 million for drug stores and $1.4 million for hardware stores. The same approach is used for other retail and service categories. Sales potential for other retail stores and services is contained in the Appendices (under separate cover).

Table 24

DOWNTOWN FARMINGTON TRADE AREA
RETAIL PURCHASING POWER, MARKET SHARE AND SALES POTENTIAL; 2010
BY MERCHANDISE CATEGORY
(In Thousands of Dollars)

Merchandise Category	Resident Purchasing Power	Estimated Market Share	Trade Area Sales	Trade Area Percent	Other Shoppers	Estimated Total Sales
CONVENIENCE GOODS						
Grocery stores	$ 62,775	35.0 %	$21,971	85 %	$ 3,877	$ 25,849
Drug & proprietary stores	19,260	45.0	8,667	90	963	9,630
Hardware	3,330	35.0	1,166	85	206	1,371
Liquor	8,325	25.0	2,081	85	367	2,449
Florist	1,620	35.0	567	85	100	667
Food/health supplement stores	540	35.0	189	85	33	222

Source: McComb Group, Ltd.

Supportable GLA for liquor stores is based on sales potential of $2.4 million divided by $375 per square foot, resulting in supportable square footage of 6,528 square feet, as shown in Table 25. The last column in this table contains the median store size from *Dollars & Cents of Shopping Centers*, published by the Urban Land Institute, for each store type. Median store size indicates a typical size for a store in each retail category. To the extent that supportable square footage is about the same as the median store size or larger, sales potential exists to support that store type. Complete tables showing supportable square footage by retail and service category for each target year are contained in the Appendices.

Table 25

DOWNTOWN FARMINGTON TRADE AREA
RETAIL SALES POTENTIAL AND SUPPORTABLE SPACE, 2010
BY MERCHANDISE CATEGORY

Category	Estimated Sales Potential	Sales Per Sq. Ft.	Supportable Square Feet	Median Store Size
CONVENIENCE GOODS				
Grocery stores	$ 25,848,000	$ 400	64,620	52,500
Drug & proprietary stores	9,630,000	460	20,935	11,700
Hardware	1,372,000	185	7,416	7,857
Liquor	2,448,000	375	6,528	2,900
Florist	667,000	190	3,511	1,600
Food/health supplement stores	222,000	250	888	1,500

Source: McComb Group, Ltd.

Retail gross leasable area (GLA) supported by estimated sales potential for each retail store category is based on estimated sales per square foot (in 2007 dollars) by store type. Sales per square foot estimates are derived from median store sales per square foot for each tenant type contained in *Dollars & Cents of Shopping Centers, 2006*. Supportable GLA is calculated by dividing sales potential by sales per square foot. This analysis was used to provide an estimate of the supportable square footage in each retail store category.

Supportable Square Feet

Farmington development potential for retail stores and services is closely related to trade area households and future growth. Current trade area households are shown at the top of Table 26 and illustrate how trade area residential development is projected to increase. Households in the Downtown trade area are estimated to increase from an estimated 12,555 in 2010 to 22,810 in 2030.

Table 26

ESTIMATED INCREASED RETAIL AND SERVICE GLA; 2010 TO 2030
(In Thousands of Gross Leasable Area)

	Actual	Cumulative Increase				
Category	2007	2010	2015	2020	2025	2030
Households		12,555	14,993	17,520	20,134	22,810
Retail Stores						
Convenience Goods	71.0		20	75	90	125
Food Service	33.0	5	15	35	48	65
Convenience/Gasoline	21.5		5	10	15	21
Shopping Goods	21.8	5	15	35	45	56
Auto Parts	15.0		7	7	14	14
Home Improvement	60.5	5	20	40	50	60
Subtotal	222.8	15	82	202	262	341
Other	133.5	6	19	38	65	100
Services						
Personal Services	42.9	2	10	19	32	50
Business Services	16.5	1	4	7	12	20
Fitness/Recreation	30.7		10	16	26	41
Professional Services	1.1	2	7	13	23	35
Auto Repair	45.9	3	10	19	32	50
Insurance	10.4	1	3	6	10	15
Financial	21.0	2	7	13	23	35
Other Services	46.2	3	10	20	34	53
Fraternal	25.3					
Subtotal	240.0	14	61	113	192	299
Medical Services	64.0	6	19	38	65	100
Subtotal	660.3	41	181	391	584	840
Contingency		31	115	229	386	600
Total	660.3	72	296	620	970	1440
Land @ 10,000 SF/acre		8	30	62	97	144

Source: McComb Group, Ltd.

Farmington currently has about 640,000 square feet of retail stores, services and medical offices. Retail stores total about 223,000 square feet and services total about 240,000 square feet. There's an additional 133,500 square feet of space that could not be identified as clearly retail stores or services and is only identified as other. Medical offices currently occupy about 64,000 square feet. Estimated demand for retail, service and medical offices accelerates to an additional 840,000 square feet by 2030. The largest increase in space occurs in the later years of the analysis period. The estimated increase between 2010 and 2015 is 140,000 square feet, which increases to 210,000 square feet in 2020. The estimated increase in demand is 193,000 square feet in 2025 with a further increase of 256,000 square feet by 2030. Estimates of supportable retail space did not identify the potential for a superstore, home store or other big box retailers. A contingency of 600,000 square feet is included to allow for the possibility that one or more of these large stores would choose to locate in Farmington. For purposes of preparing absorption estimates, the contingency was allocated to each five-year period beginning with 31,000 square feet in 2010.

Land needed to support the above retail demand is contained at the bottom of Table 26. One acre of land will support about 10,000 square feet of gross leasable area, excluding land for water retention. This indicates demand for about 84 acres. Adding 60 acres for the 600,000 square foot contingency brings total additional land area to 144 acres by 2030.

Over the next 23 years, some of Farmington's existing retail space is likely to be redeveloped to accommodate expansion of existing retailers and new retailers choosing to locate in the existing retail areas. This may result in more efficient use of land in the existing retail areas.

Chapter VIII

BUSINESS PARK DEVELOPMENT POTENTIAL

Future business park development potential in Farmington will be related to growth in the Metropolitan Area and the portion that is likely to be captured in Dakota County. Business parks is a term used by the development industry for an area that contains commercial office, office showroom, office warehouse/industrial and bulk warehouse space, and covers a broader range of buildings than industrial park. Business park indicates that a wider range of building types are acceptable.

Farmington can be expected to capture a portion of the Dakota County growth. This chapter addresses the demand for office warehouse/industrial, commercial office, office showroom, and bulk warehouse. These categories include both single tenant buildings and multi-tenant developments, and are the building types that generally locate in suburban business parks. Actual demand will depend on suitable available land, marketing incentives, and developer or tenant interest.

Existing Business Park Development

Farmington's existing business park uses consist of office warehouse/industrial and bulk warehouse buildings. Office warehouse/industrial is the largest category. Most of these buildings are located in the Farmington Industrial Park along CSAH 50.

Farmington has eight multi-tenant office warehouse/industrial properties totaling over 286,000 square feet and over 523,000 square feet of single tenant space, as shown in Table 27 on the next page. Office warehouse/industrial development activity was highest in the 1990s when four buildings were constructed. Two new buildings were constructed in 2004. Farmington's oldest single tenant office warehouse/industrial building is Kemps Creamery, constructed in 1930 with an expansion in 1945. Similar to multi-tenant buildings, the greatest development activity in single tenant office warehouse/industrial building was in the nineties when six buildings totaling 152,692 square feet were constructed. Only three buildings have been constructed since 2000.

Three bulk warehouse buildings total 195,580 square feet, as shown in Table 28. The two largest buildings are Dakota Storage (94,854 square feet) constructed in 1976, and R&L Carriers (76,314 square feet) constructed in 2007.

Table 28

FARMINGTON BULK WAREHOUSE BUILDINGS

Building Name	Year Built	Gross Building Area
Dakota Storage	1976	94,854
5465 - 212th Street W.	1982	14,280
Expansion	1986	5,972
Expansion	1989	4,160
R&L Carriers	2007	76,314
Subtotal		195,580

Source: City of Farmington and McComb Group, Ltd.

Table 27

FARMINGTON OFFICE WAREHOUSE/INDUSTRIAL BUILDINGS

Building Name	Year Built	Gross Building Area
Multi-Tenant		
Clearview Glass & Mirror	1951	40,185
Former Duo Plastics	1989	78,483
Valmont Industries	1992	94,882
Base Specialties, Inc. & Press Line Industries	1993	10,124
Controlled Air & Energy Alternatives	1995	16,160
Bauer Counter Tops & Servicemaster	1999	12,625
Vinge Tile & Stone	2004	21,600
Stein Air Corporation	2004	12,144
Subtotal		286,203
Single Tenant		
Kemps, LLC		
Creamery	1930	93,560
Storage	1945	3,700
Peerless Plastics	1958	40,742
Northern Natural Gas	1960	39,743
Mobile Mini, Inc.	1969	8,858
Expansion	1983	3,648
Expansion	1984	12,600
Installed Building Solutions	1973	17,032
Dakota Electric Association	1978	101,173
Thelen Cabinet Company	1990	18,620
P.I.C.	1994	33,173
Expansion	2006	14,883
Minnesota Pipe & Equipment	1995	12,268
Debates Decorating, Inc.	1996	11,535
Crop Characteristics, Inc.	1996	7,040
Bernard Dalsin Manufacturing Co. (BDM)	1999	70,056
Ruff Manufacturing	2001	14,484
Aerospace Fabrication & Materials	2005	20,200
Subtotal		523,315
Total		809,518

Source: City of Farmington and McComb Group, Ltd.

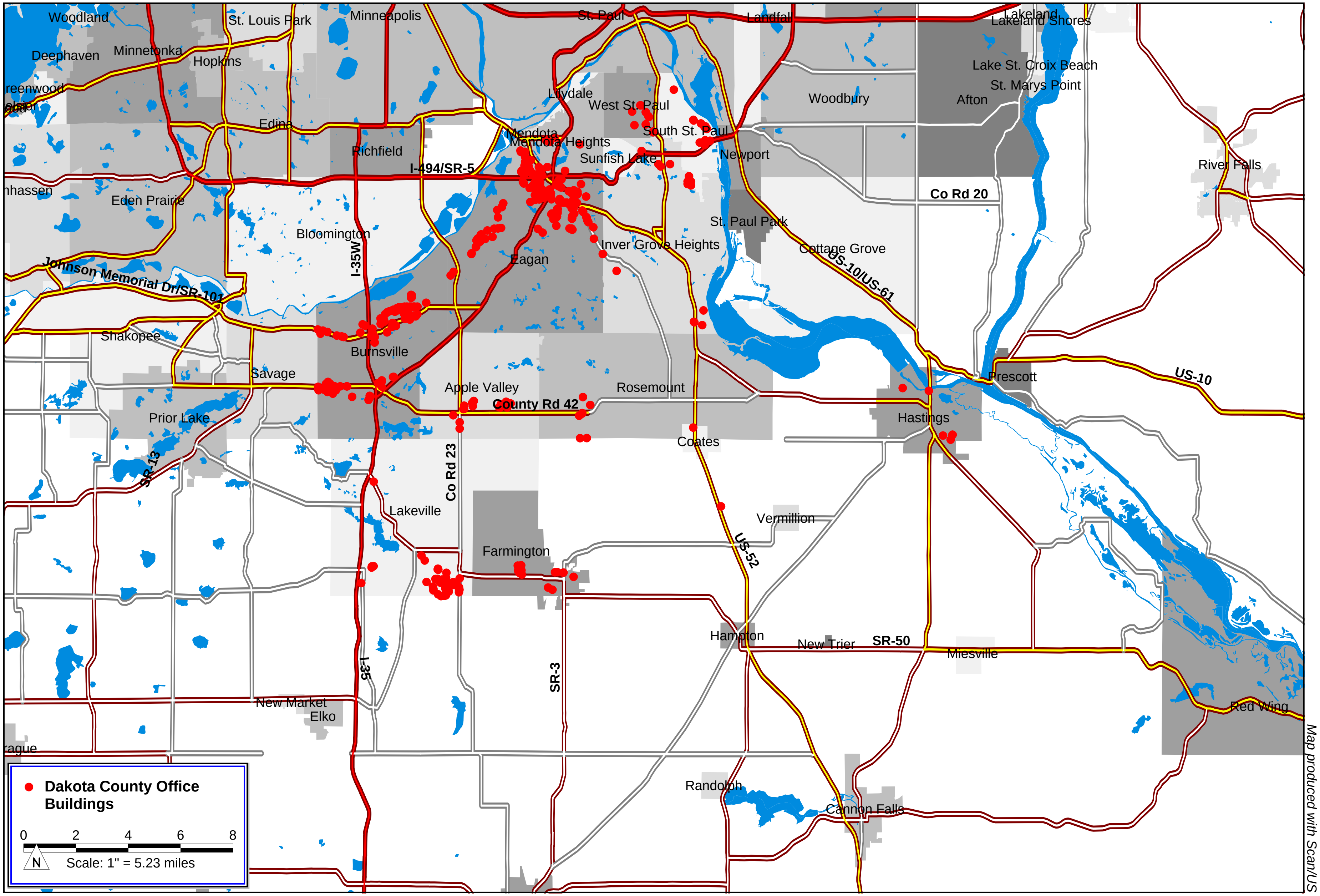
These two categories, office warehouse/industrial and bulk warehouse, represent over one million square feet of business park space. Farmington has not experienced significant commercial office or office showroom development.

Competitive Areas

Farmington competes with other communities in Dakota County in attracting business park development. This includes Burnsville, Eagan, Lakeville, Mendota Heights, Inver Grove Heights, Apple Valley, as well as Hastings, Rosemount, South St. Paul, and West St. Paul, as shown on Map 6.

Map 6

DAKOTA COUNTY BUSINESS PARK CONCENTRATIONS



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As can be seen, Eagan and Mendota Heights have the largest concentration of business park properties, particularly in the vicinity of I-494 and I-35E and TH-55, plus a somewhat smaller concentration to the southwest along TH-13 just east of the Minnesota River. Most of Mendota Heights' sites have been developed. Eagan, however, still has a large amount of available land, but it is being absorbed and land prices are increasing.

Burnsville also has two significant office and industrial concentrations. Both have access to I-35W. The largest generally extends east and west of I-35W along TH-13. The second concentration is in the area of where I-35W and I-35E merge at CSAH 42 in Burnsville. This area of office and industrial properties is separated by the Burnsville Mall retail area and extends west along CSAH 42 to Savage. Traffic congestion on CSAH 42 and TH-13 are a concern in Burnsville.

Lakeville's office/industrial concentration is much smaller than either Eagan or Burnsville. The most significant area is the AirLake Industrial Park area, located about four miles east of I-35 along Cedar Avenue in the southern most portion of Lakeville. AirLake Industrial Park is able to attract development without nearby freeway access. Much of Lakeville's business park development is served by rail.

West St. Paul, South St. Paul, and Inver Grove Heights all have a small number of office/industrial properties, with convenient access to I-494 and TH-52. Inver Grove Heights also has a number of large industrial users in the Pine Bend area along TH-55. Rosemount and Hastings have relatively small industrial and office concentrations to meet local demand.

Primary competition to Farmington is represented by Eagan and Lakeville due primarily to freeway accessibility and available sites. Apple Valley has little developable business park land at this time, but will have large areas available when gravel mining operations end.

Dakota County had about 2.7 million square feet of multi-tenant office space in 2006. Office development over the past year indicates that about 239,000 square feet of smaller office buildings have been completed. These are mostly office condominium developments that are not large enough to be included in the office inventory, which tracks buildings 30,000 square feet or larger.

Office warehouse/industrial is one of the larger multi-tenant categories in Dakota County, totaling about 5.0 million square feet in 2006. About 50,000 square feet has been completed in the last year.

Bulk warehouse space totaled 3.6 million square feet in Dakota County in 2006. Lakeville had the largest recent increase in bulk warehouse developments adding almost 250,000 square feet in two building additions for two of Lakeville's larger industrial users. Inver Grove Heights had one bulk warehouse project, a 40,000 square foot truck terminal and office building.

Recent development activity suggests that Eagan and Burnsville continue to attract multi-tenant office and office warehouse developments. Lakeville, Apple Valley and Inver Grove Heights appear to have a lower level of appeal to developers.

Broker Interviews

Developers and brokers active in the south metro area were interviewed to determine their impressions of Farmington as a place to develop business park space. A list of the people interviewed is shown in Table 29.

Table 29

LIST OF INTERVIEW PARTICIPANTS

Name	Company	
Eric Rossbach	Welsh Company	Industrial Broker
Nick Conzemius	CB Richard Ellis	Office Broker
Tony Del Dotto	United Properties	Industrial Broker
Will Leaf	Colliers Turley Martin Tucker	Industrial Broker
Bryan Van Hoof	CB Richard Ellis	Industrial Broker
Jarrod Gray	Cerron Commercial Properties	Office/Industrial

Source: McComb Group, Ltd.

These interviews suggest that there are a number of perceptions in the real estate community that may influence development of business park space in Farmington. For example, Farmington is perceived by many as “an outlying area”, and therefore not particularly attractive for significant development. This was mentioned in all interviews. Farmington was characterized as “a bit far out” and “considered as an outer tier community and still too far out for most”. Farmington is still thought of as a rural community by many. One broker relayed a comment from a prospective tenant who was considering locations in Lakeville and Farmington, that “Farmington is too far south”. The reality is that Farmington is not farther south than Lakeville. Such perceptions, if not properly addressed, may negate Farmington from consideration by businesses interested in convenient locations in the Metro Area.

Farmington is also perceived as being less desirable for business park uses than competing areas primarily because it lacks convenient freeway accessibility. This was noted in five interviews. Comments included “access is limited”, “too far off I-35”, “a little off the main thoroughfares”, and “no immediate access to the highway infrastructure”.

Concerning competing areas, Lakeville was generally noted by all as being the most attractive market (of those discussed) for industrial users. Four people commented that Lakeville had an advantage because of its easier accessibility to I-35. Three people believed that Apple Valley was not generally considered as a market for industrial development. One observed that Apple Valley’s development tended to be more office showroom and commercial office space and not much in the way of office-warehouse or other industrial. Two noted limited availability of industrial space in Apple Valley. Rosemount was generally not mentioned, although one person saw Rosemount as similar to Farmington, as a secondary market with access to TH-52. It was also noted that demand for Class A office space was fairly limited for Farmington, and surrounding communities as well, primarily because of their distance from Minneapolis and St. Paul.

Four of those interviewed indicated that the real estate community believes Farmington is presently suited to meet the needs of companies already serving the south metro; i.e., local companies that have benefited from the growth of the area and need of more space, or companies looking for lower cost development. Comments include: “local companies and investors are the most likely candidates for office space in communities situated like Farmington”, “folks that are already there and like the area are better prospects than bringing in someone new”, “more likely to find users for office warehouse space, rather than office or medical service companies”. One suggested that Farmington should consider deals with outside storage, noting that these users are being “pushed out” of closer-in communities.

Everyone that was interviewed believed that, in general, prices and rents in Farmington either are, or should be, lower than in surrounding communities. One person stated specifically that rents and sales prices for comparable properties in Farmington were significantly lower than similar properties in neighboring communities. Other opinions were based primarily on the perception that Farmington is considered more remote, less convenient, and less dynamic than competing markets. This translates to less demand and correspondingly lower prices. Two people also noted, however, that actual pricing for any specific property depends on the nature and quality of the product being offered. They both noted “exceptions” where locals were willing to pay top dollar for the “quality” space they needed.

The most positive attributes concerning Farmington as a place for development related primarily to Farmington’s market area population. While some noted that Farmington is “not as dynamic as its adjacent markets”, and has “not quite arrived just yet”; another noted the impressive residential growth in the area, indicating that Farmington’s perception as the “younger stepchild of the south metro” (i.e. “too far out and too small to be considered for development”) is becoming a thing of the past. One believed that Farmington’s very capable work force was an advantage to the area and many saw Farmington’s secure, stable customer base as attractive for growing service companies in the area.

One person also saw Farmington having a positive development future, noting that as Eagan fills up, Rosemount and Farmington will be the next likely areas for development.

Two people commented that surrounding areas had “better amenities” than Farmington. One person suggested that Farmington would have a nicer business park if the City invested more in landscaping, ponds, water features and other attractive elements. One person thought Lakeville was very helpful and easy to work with; followed closely by Farmington. This person saw Apple Valley and Rosemount as having higher taxes, and placing more development requirements on projects. One person offered an example showing the importance of economic incentives to many users. His client sought a location for 40,000 square feet of office with 80,000 square feet of warehouse, to provide 150 jobs. They considered most south metro communities (including Farmington) and chose Cottage Grove, primarily because of the tax incentives that were provided.

The above comments demonstrate that brokers active in the south metro area are not really familiar with Farmington or it’s attributes for potential business park users. Most of these respondents would be surprised to learn that Farmington has attracted 560,000 square feet of business park users over the last 16 years. Farmington’s current 1.12 million square feet of business park space is more than double Apple Valley’s current total of 484,000 square feet.

Office Warehouse/Industrial Demand

The office warehouse/industrial category also includes office research, office manufacturing, and other types of similar uses. The analysis contained in this chapter is based on information compiled by Colliers Turley Martin Tucker, augmented by information from the City of Farmington, CoStar Group, Inc., MnCAR, and McComb Group, Ltd. Colliers Turley Martin Tucker tracks only multi-tenant office warehouse buildings over 25,000 square feet. Only three Farmington office warehouse/industrial multi-tenant buildings are above 25,000 square feet, as shown in Table 30. These buildings represent 255,200 square feet of space. Buildings representing 112,000 square feet were constructed prior to 1990 and buildings totaling 143,500 square feet were constructed between 1990 and 1995. During this period, Farmington's office warehouse/industrial development represented 11.5 percent of Dakota County's absorption and 2.4 percent of the Metropolitan Area's absorption.

Table 30

OFFICE WAREHOUSE/INDUSTRIAL SPACE BY FIVE-YEAR PERIOD, 1990 TO 2006
(In Thousands of Square Feet)

Area	1990	1995	2000	2005	2006	1990-06
FARMINGTON						
Multi-Tenant over 24,999						
Number of Buildings	1	3	3	3	3	
Gross Building Area	111.7	255.2	255.2	255.2	255.2	143.5
Net Absorption		143.5				143.5
Share of Dakota County Absorption		11.5%				3.4%
Share of Metro Absorption		2.4%				0.4%
Multi-Tenant under 25,000						
Gross Building Area		26.3	38.9	73.1	94.7	68.4
Net Absorption			12.6	34.2	21.6	
Single Tenant						
Gross Building Area	219.9	238.5	379.0	463.5	483.7	263.8
Net Absorption		18.6	140.5	84.5	20.2	263.8
Share of Dakota County Absorption		1.5%	8.8%	8.4%	6.6%	6.3%
Share of Metro Absorption		0.3%	0.7%	0.6%	1.9%	0.7%
Total						
Gross Building Area	331.6	520.0	673.1	791.8	833.6	502.0
Net Absorption		188.4	153.1	118.7	41.8	502.0
Share of Dakota County Absorption		15.1%	9.6%	11.7%	13.6%	12.1%
Share of Metro Absorption		3.1%	0.8%	0.9%	3.9%	1.3%
DAKOTA COUNTY						
Number of Buildings	9	28	48	64	66	
Rentable Area	635.4	1,957.6	3,731.9	4,897.9	5,084.4	
Occupied Space	467.8	1,711.9	3,312.2	4,322.6	4,629.0	
Percent Vacant	26.4%	12.6%	11.2%	11.7%	9.0%	
Net Absorption		1,244.1	1,600.3	1,010.4	306.4	4,161.2
Share of Metro Absorption		20.5%	8.1%	7.4%	28.5%	10.9%
METRO AREA						
Number of Buildings	213	282	576	699	671	
Rentable Area	12,403.8	17,472.3	39,358.6	55,905.4	53,704.2	
Occupied Space	10,271.1	16,337.8	36,102.2	49,678.4	48,416.3	
Percent Vacant	17.2%	6.5%	8.3%	11.1%	9.8%	
Net Absorption		6,066.7	19,764.4	13,576.2	1,076.2	38,145.2

E: Estimated.
Source: CoStar Group, Inc., Mncar, and McComb Group, Ltd.

Office warehouse/industrial absorption for the period 1990 to 2006 for multi-tenant buildings under 25,000 square feet and single tenant buildings is also contained in Table 30. Multi-tenant office warehouse/industrial buildings of less than 25,000 square feet totaled 68,400 square feet between 1990 and 2006. The annual absorption has been relatively low ranging from 12,600 square feet between 1995 and 2000 to 34,200 square feet between 2000 and 2005.

Single tenant office warehouse/industrial space increased from 220,000 square feet in 1990 to 484,000 square feet in 2006. The period 1995 to 2000 represented the greatest development activity when 140,500 square feet of space was constructed in Farmington. This was equivalent to 8.8 percent of the multi-tenant office space absorbed in Dakota County. During the period 2000 to 2005, 84,500 square feet were absorbed, representing 8.4 percent of the Dakota County absorption.

Total office warehouse/industrial space increased from 332,000 square feet in 1990 to 834,000 square feet in 2006. This represented net absorption of 502,000 square feet. The largest absorption occurred in the period 1990 to 1995, when 188,400 square feet of space was absorbed, representing 15.1 percent of Dakota County's absorption. During the next five-year period, 153,100 square feet was absorbed representing 9.6 percent of Dakota County absorption. Farmington absorption declined to 118,700 square feet in the 2000 to 2005 period representing 11.7 percent of Dakota County absorption. In 2006, Farmington absorbed 41,800 square feet or 13.6 percent of the total. Over the past 16 years, Farmington absorption has ranged from 9.6 percent to 15.1 percent and averaged 12.1 percent.

Future office warehouse/industrial demand in Farmington is based on estimated market share from 2007 to 2030. Farmington has experienced moderate office warehouse/industrial development in the past, primarily in the 1990's. Office warehouse/industrial development has been more active in other parts of the Dakota County market. The Metro Area had annual growth of about 10.5 percent over the past 16 years. During the last five years, the growth rate was 6.6 percent. It is assumed that office warehouse/industrial market will remain good, but not as strong as in the past. For purposes of this analysis, Metro Area office warehouse/industrial market is expected to grow at a rate of five percent annually, as shown in Table 31. Over the past 16 years, Dakota County has absorbed about 10.9 percent of the Metro Area office warehouse/industrial development. Based on past performance, Dakota County is estimated to capture 10.5 percent of the Metropolitan Area increase in office warehouse/industrial space. Farmington's share of the Dakota County absorption is estimated at 12 percent for the period 2007 to 2011, increasing to 13 percent for the next five-year period. Market share is estimated at 14 percent beginning in 2017 and increasing to 15 percent in 2022.

The increase in office warehouse/industrial demand for Farmington over the next 25 years is estimated at about 1.7 million square feet. This is a relatively aggressive forecast and reflects the fact that much of the past office warehouse/industrial development in Farmington resulted from attractive land prices in the Industrial Park. For planning purposes, it is better to be optimistic than overly conservative.

Table 31

FUTURE OFFICE WAREHOUSE/INDUSTRIAL SPACE DEMAND; 2006 TO 2030
METRO AREA, DAKOTA COUNTY AND FARMINGTON
(In Thousands of Dollars)

	Metro Area		Dakota County		Farmington		
Year	Cumulative	Annual Sq. Ft.	Market Share	Annual Sq. Ft.	Market Share	Annual Sq. Ft.	Cumulative Sq. Ft.
2006	50,755						
2007	53,293	2,538	10.5 %	266	12.0 %	32	32
2008	55,957	2,665	10.5	280	12.0	34	66
2009	58,755	2,798	10.5	294	12.0	35	101
2010	61,693	2,938	10.5	308	12.0	37	138
2011	64,778	3,085	10.5	324	12.0	39	177
2012	68,017	3,239	10.5	340	13.0	44	221
2013	71,417	3,401	10.5	357	13.0	46	267
2014	74,988	3,571	10.5	375	13.0	49	316
2015	78,738	3,749	10.5	394	13.0	51	367
2016	82,675	3,937	10.5	413	13.0	54	421
2017	86,808	4,134	10.5	434	14.0	61	482
2018	91,149	4,340	10.5	456	14.0	64	546
2019	95,706	4,557	10.5	479	14.0	67	613
2020	100,491	4,785	10.5	502	14.0	70	683
2021	105,516	5,025	10.5	528	14.0	74	757
2022	110,792	5,276	10.5	554	15.0	83	840
2023	116,331	5,540	10.5	582	15.0	87	927
2024	122,148	5,817	10.5	611	15.0	92	1,019
2025	128,255	6,107	10.5	641	15.0	96	1,115
2026	134,668	6,413	10.5	673	15.0	101	1,216
2027	141,402	6,733	10.5	707	15.0	106	1,322
2028	148,472	7,070	10.5	742	15.0	111	1,433
2029	155,895	7,424	10.5	779	15.0	117	1,550
2030	163,690	7,795	10.5	818	15.0	123	1,673

Source: McComb Group, Ltd.

Bulk Warehouse Demand

Bulk warehouse occupied square footage in the Metropolitan Area more than doubled between 1991 and 2006, as shown in Table 32. The analysis contained in this section is based on information compiled by Colliers Turley Martin Tucker, augmented by information from the City of Farmington, CoStar Group, Inc., MnCar, and McComb Group, Ltd. Colliers Turley Martin Tucker tracks only multi-tenant bulk warehouse buildings over 50,000 square feet. Only two Farmington bulk warehouse buildings exceed 50,000 square feet.

Between 1991 and 1996, 3.1 million square feet of bulk warehouse space was absorbed in the Metropolitan Area. Absorption increased to approximately 5.7 million square feet in the period 1996 to 2001, which was followed by a 1.0 million square foot decline in occupied space in 2006. Over the past 15 years, Dakota County absorbed approximately 2.5 million square feet of bulk warehouse space or 32.3 percent of the Metropolitan Area total. Most of this absorption occurred prior to 2001. Bulk warehouse space in Farmington in 1991 totaled 119,300 square feet. One new building with 76,314 square feet was added in 2007. This represented 9.7 percent of the Dakota County absorption during the 2002 to 2006 period.

Table 32

BULK WAREHOUSE SPACE BY FIVE-YEAR PERIOD; 1991 TO 2006
(In Thousands of Square Feet)

Area	1991	1996	2001	2006	1990-06
FARMINGTON					
Gross Building Area	119.3	119.3	119.3	119.3	-
DAKOTA COUNTY					
Rentable Area	943.5	1,778.2	2,996.5	3,598.0	2654.5
Occupied Space	330.3	1,756.2	2,043.0	2,830.1	2499.8
Percent Vacant	65.0%	1.2%	31.8%	21.3%	
Absorption		1,425.9	286.8	787.1	2,499.8
Share of Metro Absorption		45.9%	5.0%	N/A	32.3%
METRO AREA					
Rentable Area	8,872.9	10,827.1	18,668.7	18,147.5	9,274.6
Occupied Space	7,246.4	10,356.2	16,038.7	14,985.1	7,738.7
Percent Vacant	18.3%	4.3%	14.1%	17.4%	
Net Absorption		3,109.8	5,682.5	(1,053.6)	7,738.7

E: Estimated.
Source: CoStar Group, Inc., Mncar, and McComb Group, Ltd.

Bulk warehouse absorption is estimated to increase at 3.75 percent between 2006 and 2030. Dakota County is estimated to capture 25 percent of that absorption, as shown in Table 33.

Table 33

FUTURE BULK WAREHOUSE SPACE DEMAND; 2006 TO 2030
METRO AREA, DAKOTA COUNTY AND FARMINGTON
(In Thousands of Dollars)

	Metro Area		Dakota County		Farmington		
Year	Cumulative	Annual Sq. Ft.	Market Share	Annual Sq. Ft.	Market Share	Annual Sq. Ft.	Cumulative Sq. Ft.
2006	14,985						
2007	15,547	562	25.0 %	140	5.0 %	7	7
2008	16,130	583	25.0	146	5.0	7	14
2009	16,735	605	25.0	151	5.0	8	22
2010	17,362	628	25.0	157	5.0	8	30
2011	18,013	651	25.0	163	7.5	12	42
2012	18,689	676	25.0	169	7.5	13	55
2013	19,390	701	25.0	175	7.5	13	68
2014	20,117	727	25.0	182	7.5	14	81
2015	20,871	754	25.0	189	7.5	14	96
2016	21,654	783	25.0	196	10.0	20	115
2017	22,466	812	25.0	203	10.0	20	135
2018	23,308	842	25.0	211	10.0	21	156
2019	24,183	874	25.0	219	10.0	22	178
2020	25,089	907	25.0	227	10.0	23	201
2021	26,030	941	25.0	235	12.5	29	230
2022	27,006	976	25.0	244	12.5	31	261
2023	28,019	1,013	25.0	253	12.5	32	293
2024	29,070	1,051	25.0	263	12.5	33	325
2025	30,160	1,090	25.0	273	12.5	34	359
2026	31,291	1,131	25.0	283	15.0	42	402
2027	32,464	1,173	25.0	293	15.0	44	446
2028	33,682	1,217	25.0	304	15.0	46	491
2029	34,945	1,263	25.0	316	15.0	47	539
2030	36,255	1,310	25.0	328	15.0	49	588

Source: McComb Group, Ltd.

Bulk warehouse absorption in Farmington is estimated at five percent per year between 2007 and 2010. Absorption increases to 7.5 percent in 2011 through 2015 and further increases to ten percent per year over the next five years. Bulk warehouse market share is estimated at 12.5 percent from 2021 to 2025 increasing to 15 percent for the last five-year period. This results in an estimated 588,000 additional square footage of bulk warehouse space. About two-thirds of this absorption occurs over the last ten-year period from 2020 to 2030.

Commercial Office

Farmington has not attracted commercial office development because these users are choosing sites in Burnsville, Eagan, and to some extent Apple Valley. Farmington, however, does have the opportunity to attract commercial office in the future as Metropolitan Area growth continues and attractive sites in other communities are developed.

The Dakota Electric Association building was classified as office warehouse/industrial due to its enclosed and exterior storage areas.

Commercial office in this analysis includes multi-tenant and single tenant office buildings. The real estate industry maintains databases for multi-tenant buildings, since that is where most of the leasing activity occurs. There is not a similar database for single tenant buildings.

This analysis is based in part on information compiled by Colliers Turley Martin Tucker, a Twin Cities area real estate company, augmented by information from the City of Farmington, CoStar Group, Inc., MnCar, and McComb Group, Ltd. Colliers Turley Martin Tucker tracks only multi-tenant buildings and only office buildings over 30,000 square feet. Thus, single tenant and smaller buildings are not represented in the Metropolitan-wide building inventory.

During the period 1990 to 2006, occupied office space in the Metropolitan Area increased from 39.3 million square feet to 55.8 million square feet, an increase of 16.5 million square feet, as shown in Table 34. This represented an annual growth rate of about 2.2 percent per year. During the same period, occupied office space in Dakota County increased by about 1.6 million square feet, capturing 9.7 percent of the Metro Area office absorption.

Table 34

MULTI-TENANT OFFICE SPACE BY FIVE-YEAR PERIOD
(In Thousands of Square Feet)

Area	1990	1995	2000	2005	2006	1990-06
Dakota County						
Rentable Area	976.1	855.7	1,533.5	2,655.2	2,756.9	1,780.8
Occupied Space	788.4	652.6	1,275.1	2,275.2	2,384.1	1,595.7
Percent Vacant	19.2%	23.7%	16.9%	14.3%	13.5%	N/A
Net Absorption		(135.8)	622.5	1,000.1	108.9	1,595.7
Share of Metro Absorption		-2.1%	7.5%	122.2%	14.7%	9.7%
Metro Area						
Rentable Area	48,833.4	52,024.8	59,579.5	67,688.0	67,139.3	18,305.9
Occupied Space	39,303.7	45,926.8	54,241.1	55,059.5	55,800.5	16,496.8
Percent Vacant	19.5%	11.7%	9.0%	18.7%	16.9%	
Net Absorption		6,623.1	8,314.3	818.4	741.0	16,496.8

Source: Colliers Turley Martin Tucker, CoStar Group, Inc., Mncar, and McComb Group, Ltd.

Future multi-tenant office potential in Farmington is reflected in Table 35, which shows commercial office space demand from 2007 to 2030. This is based on the assumption that Metropolitan Area office occupancy will grow at three percent per year. Dakota County is assumed to capture 7.5 percent of this growth during the analysis period. This is a slight decrease over the 16-year average growth rate of 9.7 percent. Farmington's market share is estimated at five percent of the Dakota County growth in 2008 through 2010, increasing to 7.5 percent from 2011 to 2019. Between 2020 and 2024, market share increases to ten percent and is estimated at 12.5 percent for the last six-year period. As quality development sites in competing areas like Eagan and Burnsville are developed, it's reasonable to expect that office demand in Farmington will increase. This indicates that Farmington's commercial office potential would be about 400,000 square feet through 2030.

Table 35

FUTURE COMMERCIAL OFFICE SPACE DEMAND; 2006 TO 2030
METRO AREA, DAKOTA COUNTY AND FARMINGTON
(In Thousands of Dollars)

	Metro Area		Dakota County		Farmington		
Year	Cumulative	Annual Sq. Ft.	Market Share	Annual Sq. Ft.	Market Share	Annual Sq. Ft.	Cumulative Sq. Ft.
2006	55,800						
2007	57,474	1,674	7.5 %	126		-	-
2008	59,198	1,724	7.5	129	5.0 %	6	6
2009	60,974	1,776	7.5	133	5.0	7	13
2010	62,803	1,829	7.5	137	5.0	7	20
2011	64,687	1,884	7.5	141	7.5	11	31
2012	66,628	1,941	7.5	146	7.5	11	41
2013	68,627	1,999	7.5	150	7.5	11	53
2014	70,686	2,059	7.5	154	7.5	12	64
2015	72,806	2,121	7.5	159	7.5	12	76
2016	74,991	2,184	7.5	164	7.5	12	89
2017	77,240	2,250	7.5	169	7.5	13	101
2018	79,557	2,317	7.5	174	7.5	13	114
2019	81,944	2,387	7.5	179	7.5	13	128
2020	84,403	2,458	7.5	184	10.0	18	146
2021	86,935	2,532	7.5	190	10.0	19	165
2022	89,543	2,608	7.5	196	10.0	20	185
2023	92,229	2,686	7.5	201	10.0	20	205
2024	94,996	2,767	7.5	208	10.0	21	226
2025	97,846	2,850	7.5	214	12.5	27	252
2026	100,781	2,935	7.5	220	12.5	28	280
2027	103,804	3,023	7.5	227	12.5	28	308
2028	106,919	3,114	7.5	234	12.5	29	337
2029	110,126	3,208	7.5	241	12.5	30	367
2030	113,430	3,304	7.5	248	12.5	31	398

Source: McComb Group, Ltd.

Office Showroom Demand

Farmington does not have any office showroom development at the present time, but it is a product type that could develop in Farmington in the future. The analysis contained in this chapter is based in part on information compiled by Colliers Turley Martin Tucker, augmented by information by the City of Farmington, CoStar Group, MnCar, and McComb Group, Ltd.

Colliers Turley Martin Tucker tracks only multi-tenant office showroom buildings over 25,000 square feet. During the period 1990 to 2006, occupied office showroom space in the Metropolitan Area increased from 11.7 million square feet to 17.1 million square feet, as shown in Table 36. This is an increase of about 5.3 million square feet, representing an annual growth rate of approximately 2.4 percent. Growth in office showroom space has moderated since 2000 as indicated by the slight drop in total office showroom square footage and modest increase in vacancy from 2000 to 2006. During this 16-year period, Dakota County saw a 633,000 square foot increase in occupied office showroom space. This represented 11.8 percent of the Metro Area office showroom absorption for that time period.

Table 36

OFFICE SHOWROOM OFFICE SPACE BY FIVE-YEAR PERIOD
(In Thousands of Square Feet)

Area	1990	1995	2000	2005	2006	1990-06
Dakota County						
Rentable Area	2,454.0	2,531.3	3,175.1	2,867.2	3,121.0	667.0
Occupied Space	1,993.8	2,294.0	2,849.5	2,505.3	2,627.0	633.2
Percent Vacant	18.8%	9.4%	10.3%	12.6%	15.8%	N/A
Net Absorption		300.2	555.5	(344.2)	121.7	633.2
Share of Metro Absorption		14.1%	19.5%	N/A	N/A	11.8%
Metro Area						
Rentable Area	14,015.6	15,041.2	18,513.0	17,691.6	18,213.8	4,198.2
Occupied Space	11,728.4	13,858.1	16,702.0	17,074.3	17,074.3	5,345.9
Percent Vacant	16.3%	7.9%	9.8%	3.5%	6.3%	N/A
Net Absorption		2,129.7	2,843.9	372.3	-	5,345.9

Source: Colliers Turley Martin Tucker, CoStar Group, Inc., Mncar, and McComb Group, Ltd.

Office showroom space generally relies on good visibility from arterial roads. This suggests that office showroom developers will be primarily interested in locations along CSAH 50 or highly traveled north-south streets such as Pilot Knob. Office showroom developers will face competition for these locations from commercial office developers that also seek highly visible locations.

Future office showroom space demand is shown in Table 37. Metropolitan Area office showroom space is estimated to continue to increase at about two percent annually with Dakota County capturing an estimated 12 percent of the Metro Area increase. Farmington is expected to capture a modest amount of the Dakota County office showroom space. No absorption is planned for the period 2007 to 2009. Office showroom absorption is estimated at ten percent annually starting in 2010, increasing to 15 percent in 2016 with a further increase to 17.5 percent in 2021 and 20 percent in 2026. Initial absorption begins at 4,000 square feet per year in 2010 and does not reach 10,000 square feet per year until 2022. Since this is a baseline forecast, it would take five years absorption to support a 23,000 square foot office showroom development. This indicates that office showroom development is likely to be relatively modest over the next 30 years. Total office showroom development over the next 23 years is 177,000 square feet or about seven 25,000 square foot developments.

Table 37

FUTURE OFFICE SHOWROOM SPACE DEMAND; 2006 TO 2030
METRO AREA, DAKOTA COUNTY AND FARMINGTON
(In Thousands of Dollars)

	Metro Area		Dakota County		Farmington		
Year	Cumulative	Annual Sq. Ft.	Market Share	Annual Sq. Ft.	Market Share	Annual Sq. Ft.	Cumulative Sq. Ft.
2006	17,074						
2007	17,416	341	12.0 %	41		-	-
2008	17,764	348	12.0	42		-	-
2009	18,119	355	12.0	43		-	-
2010	18,482	362	12.0	43	10.0 %	4	4
2011	18,851	370	12.0	44	10.0	4	9
2012	19,228	377	12.0	45	10.0	5	13
2013	19,613	385	12.0	46	10.0	5	18
2014	20,005	392	12.0	47	10.0	5	23
2015	20,405	400	12.0	48	10.0	5	27
2016	20,813	408	12.0	49	15.0	7	35
2017	21,230	416	12.0	50	15.0	7	42
2018	21,654	425	12.0	51	15.0	8	50
2019	22,087	433	12.0	52	15.0	8	58
2020	22,529	442	12.0	53	15.0	8	66
2021	22,980	451	12.0	54	17.5	9	75
2022	23,439	460	12.0	55	17.5	10	85
2023	23,908	469	12.0	56	17.5	10	95
2024	24,386	478	12.0	57	17.5	10	105
2025	24,874	488	12.0	59	17.5	10	115
2026	25,372	497	12.0	60	20.0	12	127
2027	25,879	507	12.0	61	20.0	12	139
2028	26,397	518	12.0	62	20.0	12	151
2029	26,924	528	12.0	63	20.0	13	164
2030	27,463	538	12.0	65	20.0	13	177

Source: McComb Group, Ltd.

Business Park Land Demand

Total business park space demand for 2008 through 2030 is estimated at over 2.8 million square feet, as shown in Table 38. A contingency of 25 percent (715,000 square feet) has been provided for two reasons: 1) Farmington's growth will not end in 2030; and 2) the contingency space will provide for the possibility that demand for business park space exceeds the baseline estimates.

Table 38

ESTIMATED BUSINESS PARK SPACE DEMAND; 2008 TO 2030

Category	Estimated Demand	Contingency 25%	Total
Office Warehouse/Industrial	1,675,000	420,000	2,095,000
Commercial Office	400,000	100,000	500,000
Office Showroom	180,000	45,000	225,000
Bulk Warehouse	590,000	150,000	740,000
Total	2,845,000	715,000	3,560,000

Source: McComb Group, Ltd.

These estimates could be characterized as optimistic and are likely to represent the outside range of base demand for the next 23 years. In the case of the office warehouse/industrial category, the space demand estimates take into consideration absorption in the Farmington Industrial Park, some of which was induced by attractive land pricing.

Estimated business park land demand for 2008 to 2030 is contained in Table 39. Land demand is estimated by dividing the estimated space demand by the amount of building area that can be placed on an acre of land. Commercial office, which has the highest parking demand, is estimated at 10,000 square feet per acre. The other building categories are estimated at 12,000 square feet per acre. This results in an estimated 306 acres of land necessary to accommodate the estimated growth of roughly 3.56 million square feet.

Table 39

ESTIMATED BUSINESS PARK LAND DEMAND; 2008 TO 2030

Category	Square Feet	Square Feet Per Acre	Acres
Office Warehouse/Industrial	2,095,000	12,000	175
Commercial Office	500,000	10,000	50
Office Showroom	225,000	12,000	19
Bulk Warehouse	740,000	12,000	62
Total	3,560,000	46,000	306

Source: McComb Group, Ltd.

Estimated business park demand by five-year period is contained in Table 40 by building type. These are baseline forecasts and do not take into consideration the current economic environment that may restrain development of business park properties. The total additional business park space by 2010 is estimated at 240,000 square feet. For 2015, the estimated demand increases to 708,000 square feet, an increase of 468,000 square feet for the five-year period from 2010 to 2015. Baseline demand in 2020 is estimated at 1,370,000 square feet, an increase of 662,000 square feet from 2015. This table demonstrates that space demand increases with the largest space demand estimated for the period 2020 to 2025 (931,000 square feet) and 2025 to 2030 (1,255,000 square feet).

Table 40

ESTIMATED BUSINESS PARK SPACE DEMAND
2010, 2015, 2020, 2025 AND 2030
(In Thousands of Square Feet)

Category	2010	2015	2020	2025	2030
Office Warehouse/Industrial	138	367	683	1,115	1,675
Commercial Office	20	76	146	252	400
Office Showroom	4	27	66	115	180
Bulk Warehouse	30	96	201	359	590
Total	192	566	1,096	1,841	2,845
Contingency (25%)	48	142	274	460	711
Total	240	708	1,370	2,301	3,556

Source: McComb Group, Ltd.

Land necessary to support the business park uses over the next 23 years is contained in Table 41. Baseline absorption by 2010 is estimated at 21 acres. Total demand at 2015 is 63 acres, an increase of 42 acres from 2010. Estimated land demand increases to 119 acres in 2020, an increase of 56 acres. Land demand in 2025 increases to 198 acres, an increase of 79 acres from 2020. In the last five-year period, estimated land demand increases by 108 acres.

Table 41

ESTIMATED BUSINESS PARK LAND DEMAND
2010, 2015, 2020, 2025 AND 2030
(Acres)

Category	2010	2015	2020	2025	2030
Office Warehouse/Industrial	12	31	57	93	140
Commercial Office	2	8	15	25	40
Office Showroom	-	3	6	10	15
Bulk Warehouse	3	8	17	30	50
Total	17	50	95	158	245
Contingency (25%)	4	13	24	40	61
Total	21	63	119	198	306

Source: McComb Group, Ltd.

Appendices

FARMINGTON

RETAIL AND BUSINESS PARK DEVELOPMENT POTENTIAL

Prepared for

October 2007

Appendices

FARMINGTON

RETAIL AND BUSINESS PARK DEVELOPMENT POTENTIAL

Prepared for

City of Farmington

Prepared by

Maus Group
McComb Group, Ltd.

October 2007

APPENDIX A

RETAIL AND SERVICE ESTABLISHMENTS

Table A-1 Farmington
- **Downtown**
- **Highway 3**
- **Pilot Knob**
- **Spruce Street**
- **Tamarack**
- **Other Areas**

Table A-2 Competitive Retail Areas
- **Apple Valley**
- **Lakeville**
- **Rosemount**
- **Cannon Falls**
- **Hampton**
- **Randolph**

Table A-1

FARMINGTON RETAIL - DOWNTOWN

CONVENIENCE RETAIL
Food
Econo Foods
Liquor
Farmington Liquors
Hardware
Pellicci Ace Hardware
Floral
Welcome Friends Floral & Gifts
Video
Mr. Movies

FOOD SERVICE
Full Service
Long Branch Saloon & Eatery
Farmington Steak House
Limited Service
Vart Hem Coffee Cafe
New Moon Buffet
Burger King
Farmington Bakery
B & B Pizza
Farmington Subway
Bugaloo's Ice Cream Shoppe
Pizza Man
Drinking Establishments
Gossips

CONVENIENCE/GASOLINE
Convenience/Gasoline
Kwik Trip

SHOPPING GOODS
Apparel/Accessories
Fan Club Athletics
Lillians
Furniture & Home Furnishings
Linn's Carpet
Other Shopping Goods
Servicos Latina Mena's
Gerster Jewelers Inc.
Treasures Past or Present
Memory Creek
Feely Elevator

HOME IMPROVEMENT
Home Improvement
Lamperts Yards
Dakota Wood Design

AUTOMOTIVE
Auto/RV Sales
Dakota Motors
Hansen Motor Sports
Auto Services
Pederson Auto Shop
M.R. Auto Repair
Reding Repair (Small Engine Repair)
Auto Parts
Carquest
Motor Parts Service

SERVICES
Personal Care
Great Clips For Hair
USA Nails
D.B.S. Hair Design
Farmington Barbers
Personal Services
Galaxy Travel/CWT
Heikkila Studios
TAT24U & Piercings2 Inc
Performance Travel
Business Services
Xpress Personnel
Laundry/Dry Cleaning
Launder On In
Financial
Wells Federal Bank
Expert T Billing, Inc.
Otten Seymour Law Offices
Premier Bank
Anchor Bank of Farmington
Anchor Investment Management
Edward Jones Investments
Minnesota Credit Association
Real Estate
Edina Realty
Janie's Hometeam
Insurance
Mark Phillips, Farm Bureau Insurance Agency
First National Insurance
Dakota County Farm Bureau Insurance
Miller-Hartwig Insurance
Farmer's Insurance Group
Farmer's Union/Wade Motter Agency

Table A-1 (continued)

FARMINGTON RETAIL - DOWNTOWN

SERVICES (Continued)

Medical

- Farmington Chiropractic
- Swedin Chiropractic Clinic P.A.
- Farmington Clinic
- Journey Counseling

Dental

- River's Edge Dental Clinic
- Dexterity Dental
- Orthodontic Care Specialists

Entertainment/Recreation

- America's Fitness Center
- Schmitz-Maki Arena
- Farmington Lanes
- River Church Teen Center
- USA Tae Kwon Do

Professional Services

- Burville Law Office, PA

Other Services

- Sauber Plumbing & Heating
- Performance Plumbing
- Installed Building Solutions
- Clearview Glass & Mirror
- K & C Restoration
- Meyer Custom Woodworking

Fraternal

- Farmington Eagles Club
- Corinthian Lodge 67
- VFW

Government Office

- United States Post Office
- City of Farmington
- Dakota County Library

Table A-1 (continued)

FARMINGTON RETAIL - HIGHWAY 3

FOOD SERVICE
Full Service
El Tequila

CONVENIENCE/GASOLINE
Convenience/Gasoline
Conoco
Oasis Market Marathon Gas Station

SHOPPING GOODS
Furniture and Home Furnishings
Happy Harry's Furniture

HOME IMPROVEMENT
Home Improvement
Castle Rock Air Tool

AUTOMOTIVE
Auto/RV Sales
K & K Auto Ranch
JR Wholesale
G & M Select Autos
Auto Services
Dakota Marine and Motor Sports
Cleaves Transmission
J & L Auto Repair
AB Auto Body
Battery Center
Parkway Auto Body & Repair
Starr Automotive

SERVICES
Personal Care
Rite Touch Salon & Tanning
Towns Edge Barber
Personal Services
Brenda's School of Dance
Action Driving School
Laundry/Dry Cleaning
Total Care Dry Cleaners Inc
Financial
Farm Credit Services
Castle Rock Bank
Insurance
American Family Insurance
Dakota-Stanton Mutual Insurance Co.
Medical
Farmington Vet Clinic and Pet Hospital
Hadler Family Chiropractic, LLC
Dental
Dental Health Center, DDS, PA
Entertainment/Recreation
Curves for Women of Farmington
Farmington Billiards
Other Services
Heikes Equipment, Inc.
Farmington Mini Storage
C.R. Fischer and Sons, Inc.
C.G. Construction and Farmington Truck Center

Table A-1 (continued)

FARMINGTON RETAIL - PILOT KNOB

CONVENIENCE RETAIL
Drug
CVS
Liquor
Farmington Liquors
Video
Movie Gallery

FOOD SERVICE
Full Service
Ugly Mug
Ted's Pizza
Limited Service
Farmington Subway II
Mei Wei
Dominos

CONVENIENCE/GASOLINE
Convenience/Gasoline
SuperAmerica
Kwik Trip

SERVICES
Personal Care
Cahill Salon
Fantastic Sam's
Great Clips
TC Nails
Get Tan
Massage
Personal Services
Pampered Pet Spa
Business Services
Midwest Staffing Group, Inc
Financial
Anchor Bank
Insurance
Allstate - J. Pitonyak Agency
Medical
Fairview*
Family Vision Clinic
Prairie Counseling
Akin Hills Pet Hospital
Quickview Integrity Chiropractic
Entertainment/Recreation
Snap Fitness

* Under Construction Charleswood Crossing.

Table A-1 (continued)

FARMINGTON RETAIL - SPRUCE STREET

FOOD SERVICE
Limited Service
McDonald's

HOME IMPROVEMENT
Home Improvement
Vinge Tile & Stone
Debates Decorating, Inc.
Thelen Cabinet Company

SERVICES
Auto Service
Lake Marion Marine & Small Engine Repair
Personal Service
Just Kidding Around Daycare & Preschool
Business Service
TEAM Personnel Services, Inc
Financial
Barbara J. Ackerman, PA Tax & Acctg.
Real Estate
Re/Max Real Metro South
Medical
Family Health Medical Clinic Farmington
River Valley Home Care, Inc.

Table A-1 (continued)

FARMINGTON RETAIL - TAMARACK

FOOD SERVICE
Limited Service
Dunn Bros Coffee

SHOPPING GOODS
Electronics
Sprint

SERVICES
Financial
H & R Block
Roundbank
Insurance
Roundbank Insurance
Entertainment/Recreation
Anytime Fitness

Table A-1 (continued)

FARMINGTON RETAIL - OTHER AREAS

FOOD SERVICE

Full Service

County Lane Café

Limited Service

Dairy Queen

HOME IMPROVEMENT

Home Improvement

Dakota County Lumber

Lawn & Garden

Landscape Depot, Inc.

Farmington Greenhouse

AUTOMOTIVE

Auto Services

Car Wash

Rambling River Repair

Block's Auto Service

SERVICES

Personal Services

Anna's Bananas Day Care

White Funeral Home

Medical

Trinity Terrace

Allina Medical Clinic - Eye Center

Allina Medical Clinic - Farmington

Dental

Immanuel Dental

Other Services

A-Quality Home Inspections

Always Handy Handyman Services

Mobile Mini, Inc.

Groen's Vacu-man

C & M Homes

Broadband Solutions

Farmington Printing

Roschen Dairy Distributing

Schmidtke Fuels

Servicemaster South Metro

Bauer Counter Tops

Dakota Storage

Bugbee's Locksmith

Fraternal

American Legion (Clifford Larson Post 189)

Lodging

Rest Well Motel

Table A-2

APPLE VALLEY RETAIL - CEDAR AVENUE & COUNTY RD 42
August 2007

CONVENIENCE RETAIL

Food
- Cub Foods
- Von Hansen’s Fresh Meats and Produce
- Desi Foods (Indian Grocery)
- Rainbow Foods
- Let's Dish

Drug Store
- Walgreens

Liquor
- Apple Valley Liquors

Floral
- Apple Valley Florist
- Florist

Video
- Hollywood Video

FOOD SERVICE

Full Service
- Osaka Seafood and Steakhouse
- Wing Street
- Pizza Hut
- Sung Lung Chinese Cuisine
- Old Chicago Restaurant
- Grizzly’s Grill and Saloon
- Bakers Square
- World Buffet (Chinese Cuisine)
- Broadway Station Pizza

Limited Service
- MacDonald’s
- Kalli’s Popcorn Shop
- Dairy Queen
- Brueggers
- Taco Bell
- Raising Canes (Chicken Fast Food)
- KFC
- A & W
- LeeAnn Chin
- Chipotle
- Subway
- Boston Market
- Arby's
- Wendy’s
- Cold Stone Creamery
- Papa Murphy’s Pizza
- Panera

SHOPPING GOODS

General Merchandise
- Walmart.
- Super Target

Apparel/Accessories
- Christopher & Banks
- Westwood Sports (Sports Clothing)
- Fashion Bug
- Burlington Coat Factory
- Twins Pro Shop
- Payless Shoe Store

Furniture & Home Furnishings
- Cinaura Consignment Furniture
- Home Crafters (Home Furnishings)
- Warner Stellian
- Galley Additions (Housewares and Stuff)
- Original Mattress Factory
- Oreck Vacuum Cleaner Store

Electronics
- AT&T
- Radio Shack
- Best Buy

Other Shopping Goods
- Fabric Town
- Wet Pet (Fish Store)
- Apple Valley Jewelers
- Creative Sewing Center
- Valley Bike and Ski Shop
- Tobacco Store
- Party America
- JoAnn Fabric Store
- PetCo
- Office Max
- Party City
- J.F. Jeweler
- GNC
- Cartridge World
- Arts and Frame Depot

Pr-Owned Merchandise
- Video and CD Outlet Store
- Echo Used DVDs and Games
- Half Price Books

Table A-2 (continued)

APPLE VALLEY RETAIL - CEDAR AVENUE & COUNTY RD 42
August 2007

HOME IMPROVEMENT
Lawn & Garden
Bachman's

AUTOMOTIVE
Auto Parts
Napa Auto Parts
Car Quest Auto Parts
Red Rooster Auto Parts
Checker Auto Parts

SERVICES
Auto Service
Tires Plus
Personal Care
Nails by Diane
Tanning Salon
Barber Shop
Great Clips
Salon Picasso Hair Stylist
Pet Clips
Great Clips
Nail Spa
Cole’s Salon (Hair)
Super Cuts
Personal Services
ProEx Portrait Studio
Business Services
Mail, Pack and Ship
UPS Store
Laundry/Dry Cleaning
Manner Cleaners
Valley Cleaners
Laundromat
Pilgrim Cleaners
Financial
H & R Block
Liberty Income Tax
TCF Bank
US Bank
Medical
Rusoff Chiropractic Center
Entertainment/Recreation
Karate Place
Lodging
American Inn

VACANT
Vacant (3)

Table A-2 (continued)

APPLE VALLEY RETAIL - FISCHER MARKETPLACE
August 2007

CONVENIENCE RETAIL
Food
Durango Market
Drug Store
CVS Pharmacy
Snyder's Drug Store

FOOD SERVICE
Full Service
Ruby Tuesday Restaurant
I-Hop Restaurant
Noodles and Company
Majors Bar and Restaurant
El Azteca (Mexican Restaurant)
Limited Service
Milio's Sandwiches
Satay to Go (Indian Food)

CONVENIENCE/GASOLINE
Convenience/Gasoline
Kwik Trip Gas Station

SHOPPING GOODS
General Merchandise
Kohl's
Sam's Club
Apparel/Accessories
Famous Footwear
The Avenue
Furniture & Home Furnishings
Bed Bath and Beyond
Mattress Giant
Electronics
Verizon Store
T-Mobile
Other Shopping Goods
Barnes and Noble
Michael's Craft Store
Hallmark
Golf, Etc.

HOME IMPROVEMENT
Home Improvement
Menards
Home Depot

SERVICES
Personal Care
KC Cuts
KC Nails
Personal Services
Carlson Wagonlit
Financial
Eagle Valley Bank
Insurance
State Farm Insurance
Real Estate
GMAC Mortgage
Dental
Metro Dental Care
Entertainment/Recreation
Any Time Fitness
Other Services
Excel Tailor

Table A-2 (continued)

APPLE VALLEY RETAIL - EAST VALLEY PLAZA
August 2007

CONVENIENCE RETAIL
Drug Store
Walgreens
Liquor
Apple Valley Liquor
Video
Mr. Movies

FOOD SERVICE
Full Service
Mei Fun Chinese Food
Lynwood Pizza
Laiwah Restaurant (Asian Cuisine)
Limited Service
Domino's Pizza
Subway

CONVENIENCE /GASOLINE
Convenience/Gasoline
PDQ
Oasis Market

SHOPPING GOODS
Variety
A Dollar Store (Closing soon)
Apparel/Accessories
Mainstream Boutique
Furniture & Home Furnishings
Tessa Works (Gifts and Home Décor)

SERVICES
Personal Care
Apple Valley Hair Salon
Great Clips
Cabana Tan
Tams Spa and Nails
Business Services
Mail N Parcel Store
Laundry/Dry Cleaning
Premiere Cleaners
Real Estate
Help U Sell Real Estate
US Mortgage
Medical
Chiropractor Office
Dental
East Valley Dental
Entertainment/Recreation
Budo Karate Center
Snap Fitness
Other Services
New Horizon Child Care

Table A-2 (continued)

APPLE VALLEY RETAIL - CEDAR AVE & 146th St. W
August 2007

FOOD SERVICE
Full Service
Buffalo Wild Wings
Applebee’s
Joey's Seafood
Limited Service
Caribou Coffee

SHOPPING GOODS
Furniture & Home Furnishings
Carpet's Plus
Other Shopping Goods
Archivers

SERVICES
Personal Care
Kid's Hair
Other Services
FedExKinko’s

Table A-2 (continued)

LAKEVILLE RETAIL - DOWNTOWN

CONVENIENCE RETAIL
Drug Store
Erickson Drug
Hardware
Ace Hardware
Floral
Flora

FOOD SERVICE
Full Service
Babe's
Main Street Coffee Café
Limited Service
Dairy Delight

SHOPPING GOODS
Variety/Dollar
Ben Franklin
Furniture & Home Furnishings
Patriot Stove & Fireplace
Hertaus Floors
The Porch
Other Shopping Goods
World of Games
Lakeville Jewelers
Whimsy Redhot Boutique
Lakeville Vacuum

AUTOMOTIVE
Auto Services
Good Year Lakeville Tire & Auto Service

SERVICES
Personal Care
Lakeville Barbers
Mohn Barber Shop
Barger's Hair Design
Pearl Light Nails
Personal Services
South of the River Driving School
HDC Hockey Development Center
ATA Karate
Financial
ATS Accounting & Tax Solutions
Larson Accounting & Tax
Wells Fargo Bank
Edward Jones Investments
Discovery Financial Centers Inc.
Rainbow Mortgage
Columbia Mortgage
Insurance
Miller Hartwig Insurance
State Farm Insurance
Lakeville Insurance
Kohlnhofer Insurance
Entertainment/Recreation
Lakeville Family Bowl
Curves for Women
Professional Services
Glen Nord & Tom M. Dwire Attorneys at Law
Sieben, Grose, Von Holtum & Carey Ltd.
Other Services
PC Service
Gold Mine Design
McGuire Mechanical
Twin Cities Promotions & Apparel
Fraternal
VFW

Table A-2 (continued)

LAKEVILLE RETAIL - HERITAGE COMMONS

CONVENIENCE RETAIL
Food
Cub Foods (soon to open)
Liquor
Lakeville Liquors

FOOD SERVICE
Full Service
Teresa's Mexican Restaurant
Limited Service
Subway
Cold Stone Creamery
Pizza Prime
McDonalds

CONVENIENCE/GASOLINE
Convenience/Gasoline
Marathon "C" Store
Qwik Trip

SHOPPING GOODS
Apparel/Accessories
Lakeville Athletics Apparel

HOME IMPROVEMENT
Home Improvement
Pro Build

AUTOMOTIVE
Auto Services
Hometown Auto Services
Lake Marion Collision

SERVICES
Personal Care
Great Clips
Five Star Nails
Beachcombers Tanning
Personal Service
Minnesota School of Beauty
New Horizon Day Care
White Funeral Home
Business Services
Cornerstone Copy
Laundry/Dry Cleaning
Lakeville Cleaners
Financial
US Bank
Provincial Bank
Anchor Bank
New Market Bank
Insurance
Lakeville Insurance Agency
Medical
Lake Marion Chiropractic
Dakota Pet Clinic
McDonald Eye Care Associates
Dental
Orthodontic Specialists PA
South Metro and Enodontrics PA
Peterson Dental Clinic
Lakeville Dental
Entertainment/Recreation
Lakeville Any Time Fitness
Other Services
South Metro Rental
Friedges Landscaping and Excavating
Showroom - Equipment storage

VACANT
Possibly a vacant store

Table A-2 (continued)

LAKEVILLE RETAIL - CROSSROADS

CONVENIENCE RETAIL
Food
Cub Foods
Drug Store
CVS Pharmacy
Video
Mr. Movies

FOOD SERVICE
Full Service
Chan's
Dino's - The Greek Place
Copper Bleu
El Patio
Limited Service
Caribou Coffee
Insta Juice
Quiznos
Blue Sky Creamery

SHOPPING GOODS
Furniture & Home Furnishings
Sile Stone
Saavy Spaces
Electronics
Sprint
All Star Wireless
Other Shopping Goods
Sea of Beads
Chuck & Don's Pet Food Outlet

AUTOMOTIVE
Auto Services
Paramount Auto Service

SERVICES
Personal Care
Great Clips
Salon Onyx
Heidi Nails
Catch A Tan
Delux Nails
Personal Services
New Horizon
Mathnasium
LA Weight Loss
Suki's Tailor
Business Services
Kwik Copy
Laundry/Dry Cleaning
Martinizing Dry Cleaning
Financial
TCF Bank
Bank of the West
Insurance
American Family Insurance
Dental
Childrens Dental Care
Metro Dental Care
Entertainment/Recreation
Danceworks
Snap Fitness
American Academy of Tae Quan Do
Healthworks

Table A-2 (continued)

LAKEVILLE RETAIL - LAKEVILLE CROSSING

CONVENIENCE RETAIL
Drug Store
Walgreens
Liquor
Lakeville Liquors
Video
Box Office Video

FOOD SERVICE
Full Service
Fang
Papagayos
Pizza N Pasta
Limited Service
Carbone's

CONVENIENCE/GASOLINE
Convenience/Gasoline
Holiday Gas Station
Super America

SHOPPING GOODS
Apparel/Accessories
Dance Apparel
Electronics
Wireless Toyz
Other Shopping Goods
Runner's Gate
Knitter's Palace
Holy Cross
Penzey's Spices
Play It Again Sports

AUTOMOTIVE
Auto Services
Northland Collision
Pro-Tech Automotive

SERVICES
Personal Care
Fanstastic Sam's
Infinty Salon
Trade Secret
Jolies Nails
Planet Beach
Personal Services
Aravada Massage
Cruise Holidays
Seattle Sutton's Healthy Eating
Laundry/Dry Cleaning
Dry Cleaning Station
Financial
Provincial Bank
US Federal Credit Union
Provincial Mortgage
Summit Title
Real Estate
Edina Realty
Insurance
American Family Insurance
State Farm Insurance
Medical
Apple-Lake Animal Hosptal
Dental
Metro Dental Care
Entertainment/Recreation
Ladies Workout Express
Other Services
ABC Computer Repair
Computers
Super Suppers
I Sold It On E-bay
Shoe Repair
Toll Gasses & Welding Supplies

Table A-2 (continued)

ROSEMOUNT RETAIL - DOWNTOWN
August 2007

CONVENIENCE RETAIL
Food
Morning Glory Bakery
Hardware
Terry's Ace Hardware
Floral
Rosemount Floral

FOOD SERVICE
Full Service
McDevitt's Sports Pub and Eatery
Reno's Pizza
Reno's Pizza
Shenanigans Pub
Celts Pub

CONVENIENCE/GASOLINE
Convenience/Gasoline
BP Convenience Store
Kwik Trip
Marathon "C" Store

SHOPPING GOODS
Other Shopping Goods
Dakota Awards and Engraving
Fluegel's Farm,Garden and Pet Supply
Quilters Haven for your Quilting needs
Rosemount Saw and Tool
Pre-Owned Merchandise
Hop Antiek Market
Irish Loon Antiques

HOME IMPROVEMENT
Home Improvement
Boulder Images Building Materials

AUTOMOTIVE
Auto/RV Sales
Budget Auto and Truck Rental
Save More Auto
Auto Services
Car Wash
Cha's Auto Repair
Master Transmission
Rosemount Car Wash
Save More Auto Towing
Soder Repair
Tire One
Young Garage
Other Equipment Sales/Marine
Carlson Tractor and Equipment Co.
Will's Boats

SERVICES
Personal Care
Barber Parlor
Cahill Salon
Rosemount Hair Shop
Strokes for Folks – Therapeutic Massage
Personal Services
Child Care and Preschool – Opening in October
In the Light Dance Studio
Paws Appeal Pet Salon
Financial
First State Bank of Rosemount
Hanson, McCann and O'Conner, PA
Horizon Financial Mortgage Corp
Warweg and Thommes Tax and Accounting
Real Estate
ERA Real Estate
Twin City Homes
Insurance
All State Insurance
Anderson Insurance Consultants
State Farm Insurance
Medical
Johnson Chiropractic
Rosemount Chiropractic Center
Shamrock Animal Hospital
Dental
Art J. Nelson, DDS
Dentist
Mardell, Carlson and Neuenschwander Family Dentistry
Entertainment/Recreation
America's Fitness Center
Betty Jo's Dance Center
It Figures Exercise
Marcus Theater
OOMA Worldwide Health and Wellness Center
Other Services
Basic Builders
Corrigan Electric
Graff's Heating and Air
Hawkins Services
Rosemount AA
Schwanz Land Surveyors
Fraternal
American Legion
Government Office
United States Post Office

VACANT
Vacant Building
Vacant Building
Vacant Building
Vacant Store

Table A-2 (continued)

ROSEMOUNT RETAIL - ROSEMOUNT MARKET SQUARE
August 2007

CONVENIENCE RETAIL
Liquor
Rosemount Liquor
Floral
Bella Bouquet
Video
Movie Gallery (store is closing)

FOOD SERVICE
Full Service
Pizza Man
Seng Foon (Asian Food)
Pizza Hut
Limited Service
Burger King
Dairy Queen
McDonald's
Taco John's

CONVENIENCE/GASOLINE
Convenience/Gasoline
Holiday Gas Station Store

SHOPPING GOODS
Furniture & Home Furnishings
Stestedts Carpet and Linoleum

AUTOMOTIVE
Auto Parts
Checker Auto Parts

SERVICES
Auto Services
Vavoline Oil Change
Personal Care
USA Nails
Laundry/Dry Cleaning
Cleaners
Financial
Edward Jones
Real Estate
Help U Sell Real Estate
Entertainment/Recreation
Curves for Women

VACANT
Vacant (1)

Table A-2 (continued)

ROSEMOUNT RETAIL - ROSEMOUNT CROSSING
August 2007

CONVENIENCE RETAIL
Food
Aldi's Grocery Store
Liquor
MGM Wine and Spirits

FOOD SERVICE
Full Service
Rudy's Red Eye Grill
Eddie Cheng (Asian Cuisine)
Limited Service
Starbuck's Coffee

SERVICES
Personal Care
Nail Design Shop
Fantastic Sam's
Sol 360 Degree Tanning
Entertainment/Recreation
Any Time Fitness
Jamm Dance Company

VACANT
Vacant (1)

Table A-2 (continued)

ROSEMOUNT RETAIL - ROSEMOUNT VILLAGE CUB
August 2007

CONVENIENCE RETAIL
Food
Cub Foods
Liquor
Shenanigans
Video
Blockbuster

FOOD SERVICE
Full Service
East Meets West (Chinese Cuisne)
Applebees
Limited Service
Subway
Papa Murphy's Pizza
Dunn Brothers Coffee
Quizzno's
Caribou
A&W
KFC
Pizza and Pasta
Wendy's

SHOPPING GOODS
Other Shopping Goods
Hallmark Store

SERVICES
Personal Care
Nivala & Company Salon
Cost Cutters
Impress Nails
Great Clips
Touch of Sun Tanning
Color Me Perfect Salon
Laundry/Dry Cleaning
Lakes Tailors and Cleaners
Medical
Rosemount Eye Clinic
Dental
Robinson's Dental
Entertainment/Recreation
Butterfly Life (Nutrition/Fitness)

VACANT
Vacant (6)

Table A-2 (continued)

CANNON FALLS RETAIL - DOWNTOWN

CONVENIENCE RETAIL
Food
- Econo Foods
- Lorentz Meats & Deli

Drug Store
- Scofield Drug & Gift

Liquor
- Rod's Liquor
- Cannon River Winery

Hardware
- Althoff's Hardware & Appliances
- Hjermstad Trustworthy Hardware

Video
- Valu Plus Video
- Cannon Valley Video & Tanning

FOOD SERVICE
Full Service
- Chugger's
- Brewster's Bar & Grill
- Mill Street Tavern
- Oriental Lodge
- Stone Mill & Coffee House Eatery
- Dudley's Pizza & Sandwich Shop

Limited Service
- Hi-Quality Bakery & Coffee Shop
- Dairy Inn
- Pizza Man
- 4th Street Marketplace & Coffee Bar

Drinking Establishments
- VFW
- American Legion

CONVENIENCE/GASOLINE
Convenience/Gasoline
- Oasis Market/Marathon Gas (south end)
- Oasis Market/Marathon Gas (north end)
- Cenex Gas

SHOPPING GOODS
Variety/Dollar
- EECI Discount Outlet

Electronics
- EDP Computer Systems

Other Shopping Goods
- Northside Bait Shop
- Pine & Prints Custom Framing
- Chicago Ed's Jewelry & Watches
- Kitty Applegates
- Dave's TV

Pre-Owned Merchandise
- Schaffer's Antiques

HOME IMPROVEMENT
Home Improvement
- Cannon Falls Greenhouse & Floral

AUTOMOTIVE
Auto Services
- Sandstorm Repair
- Johnson's Collision Center
- Doc's Service
- Cannon Auto Repair
- Lindahl Tire Service Good Year
- Lee's Chevrolet-Oldsmobile Company Body Shop
- Dakota Car Wash (self serve)
- Cannon Electric Motor
- Cooper Tire Store

Other Equipment Sales/Marine/Small Engine
- Arena Trailer Sales
- Northridge Truck Accessories

SERVICES
Personal Care
- Old Fashion Barber
- Lookin Good Full Service Salon
- The Family Salon

Personal Services
- Lundberg Funeral Home
- Acaccia Studios Massage & Healing Center
- Four Seasons Travel

Laundry/Dry Cleaning
- 5-Star Laundry and Cleaners
- Coin Laundry Mat

Financial
- Larry J. Dammer, LTD CPA
- Bob Carnell Appraisals
- First National Bank
- First Farmers & Merchants National Bank
- Edward Jones Investments
- Thrivent Financial for Lutherans
- Todd Prink, IEA Wealth Management
- My Mortgage Pro, Kerry Quam
- Haugen Consulting Tax Preparation
- Cannon Valley Title

Real Estate
- Carnel & Company Realtor's
- Resource Realty
- Cannon Realty
- Edina Realty

Table A-2 (continued)

CANNON FALLS RETAIL - DOWNTOWN

SERVICES (continued)

Insurance

- Freeberg Insurance
- IB Insurance Brokers of Minnesota, Inc. Todd Prink
- Flom Insurance
- Mutual Insurance Company
- AAA Independent Insurance Agent
- American Family Insurance, Bob Brintnall
- Vasa Spring Garden Mutual Insurance
- Farm Bureau Financial Services
- Nelson Insurance

Medical

- Bodyworks Clinic, Chiropractic, Acupuncture & Massage
- Cannon Falls Medical Center
- Animal Health Center

Entertainment/Recreation

- Cycle America
- Cannon Falls Canoe Rental
- Cannon Golf Club
- Fit on 4th/A Gathering Place for Women's Health & Fitness

Professional Services

- Timothy K. Dillon, Attorney at Law
- Law Offices of J.M. Burkhardt

Other Services

- Lindell Heating and Air Conditioning, Inc.
- Lindell Heating & A/C
- Cannon Falls Storage
- Stor-Rite Storage
- Lorentz Storage
- United Vanlines
- New Beginnings

Government Office

- Chamber of Commerce
- Library
- United States Post Office

VACANT

- Deb's Pets

Table A-2 (continued)

CANNON FALLS RETAIL - TH-52 AND CR 24

CONVENIENCE RETAIL
Hardware
Ace Hardware

FOOD SERVICE
Full Service
China City Restaurant
Country Kitchen
Piccadeli's Circus Pizza
Limited Service
Dairy Queen
McDonald's
Rockets
Subway
Drinking Establishments
Class Act

CONVENIENCE/GASOLINE
Convenience/Gasoline
Cannonball Auto & Truck Plaza
Rapp's Short Stop (Mobile Gas)
Marathon Gas
Super America Gas

SHOPPING GOODS
Variety/Dollar
Family Dollar
Furniture & Home Furnishings
Lindell Cabinets
Cannon Flooring
Other Shopping Goods
The Picket Fence
Country Supply Antique Mall
Triple C Carts, Inc.
Banks Outdoors
Cannon Valley Ranch Country Supply

HOME IMPROVEMENT
Home Improvement
Interstate Building Supply & Design Center

AUTOMOTIVE
Auto/RV Sales
Cannon Falls Outlet Auto
Kevin's Klassic Cars
Auto Services
Juracich Auto Repair
J's Quick 'n Lube
Triangle Complete Machine Shop & Radiator Repair
Ferguson Process Services
Cannon Mall Car Wash
Siewert's Towing
Fillmore Express Inc.
Transmission Repair, Auto, Truck & Farm
Professional Restoration
Auto Parts
Bumper to Bumper Auto Parts
O'Rielly Auto Parts
Other Equipment Sales/Marine/Small Engine
Rental Cannon Valley Engine Powered Equipment
Country Side Implements Inc.
Cannon Power Sports
Honda/Yamaha
Cannon Falls Trailer Sales

SERVICES
Personal Services
Wee Care Daycare & Learning Center
Express Personnel Services
Financial
White Rock Bank
Community Resource Bank
Total Wealth Care
Real Estate
Edina Realty
Insurance
State Farm Insurance
Entertainment/Recreation
Workout 24/7
Curves for Women
Lodging
Best Western Saratoga Inn
Caravan Motel
Other Services
Grandpa's Garage
Bonnie's Grooming and Pet Fashions
Cannon Mall Storage
Quality Storage
MRC-Auction.com
Write-On
Cannon Valley Rental
Uhaul Rental
Franklin Welding & Repair

Table A-2 (continued)

HAMPTON RETAIL

FOOD SERVICE
Full Service
Black Stallion
Little Oscar's Restaurant
Drinking Establishments
Frank's Place
Lucky's Roundup Bar

CONVENIENCE/GASOLINE
Convenience/Gasoline
Phillips 66

AUTOMOTIVE
Auto Services
BMD Auto Body & Painting

SERVICES
Personal Care
Main Street Salon
Financial
Merchant's Bank
Lodging
Silver Bell Motel

Table A-2 (continued)

RANDOLPH AREA RETAIL

FOOD SERVICE
Full Service
Rocky's Country Crossroads
Drinking Establishments
Red Diamond Saloon

CONVENIENCE/GASOLINE
Convenience/Gasoline
Cenex Gas, Woody's Pump N Munch

AUTOMOTIVE
Auto/RV Sales
Woody's Auto, Inc.
Auto Services
Klahr's Garage

SERVICES
Personal Care
City's Edge Family Hair Salon
Other Services
Farmers Union Co-op Oil Assn.
Walco USA, Inc.
Picnic Tables on the Go

APPENDIX B

DEMOGRAPHIC CHARACTERISTICS

Table B-1 **Farmington Downtown and Marketplace Trade Areas and Minneapolis-St. Paul MSA; Population and Households: 1990 and 2000 Census; 2006 and 2011 Estimated**

Table B-2 **Farmington Downtown and Marketplace Trade Areas and Minneapolis-St. Paul MSA; Average and Median Household Incomes: 1990 and 2000 Census; 2006 and 2011 Estimated**

Table B-3 **Farmington Downtown and Marketplace Trade Areas and Minneapolis-St. Paul MSA; Household Income: 1990 and 2000 Census; 2006 and 2011 Estimated**

Table B-4 **Farmington Downtown and Marketplace Trade Areas and Minneapolis-St. Paul MSA; Households, Families and Household Size: 1990 and 2000 Census; 2006 and 2011 Estimated**

Table B-5 **Farmington Downtown and Marketplace Trade Areas and Minneapolis-St. Paul MSA; Educational Attainment: 1990 and 2000 Census; 2006 and 2011 Estimated**

Table B-6 **Farmington Downtown and Marketplace Trade Areas and Minneapolis-St. Paul MSA; Gender and Marital Status: 1990 and 2000 Census; 2006 and 2011 Estimated**

Table B-7 **Farmington Downtown and Marketplace Trade Areas and Minneapolis-St. Paul MSA; Age Distribution: 1990 and 2000 Census; 2006 and 2011 Estimated**

Table B-8 **Farmington Downtown and Marketplace Trade Areas and Minneapolis-St. Paul MSA; Ethnicity: 1990 and 2000 Census; 2006 and 2011 Estimated**

Table B-1

FARMINGTON
DOWNTOWN AND MARKETPLACE TRADE AREAS AND MINNEAPOLIS-ST. PAUL MSA
POPULATION AND HOUSEHOLDS: 1990 AND 2000 CENSUS; 2006 AND 2011 ESTIMATED

	Population		Households	
Trade Area / Year	Number	Rate of Change	Number	Rate of Change
DOWNTOWN TRADE AREA				
1990	14,501	N/A	4,812	N/A
2000	24,100	5.21 %	8,062	5.30 %
2006 E	29,971	4.46	10,675	5.78
2011 E	34,906	3.10	13,043	4.09
MARKETPLACE TRADE AREA				
1990	4,857	N/A	1,485	N/A
2000	12,700	10.09 %	3,944	10.26 %
2006 E	16,479	5.35	5,479	6.79
2011 E	19,521	3.45	6,819	4.47
MINNEAPOLIS-ST. PAUL MSA				
1990	2,538,834	N/A	960,170	N/A
2000	2,968,806	1.58 %	1,136,615	1.70 %
2006 E	3,183,477	1.41	1,294,208	2.63
2011 E	3,351,906	1.04	1,422,203	1.90

N/A: Not Available.

E: Estimated.

Source: U.S. Census, Scan/US and McComb Group, Ltd.

Table B-2

FARMINGTON
DOWNTOWN AND MARKETPLACE TRADE AREAS AND MINNEAPOLIS-ST. PAUL MSA
AVERAGE AND MEDIAN HOUSEHOLD INCOMES
1990 AND 2000 CENSUS; 2006 AND 2011 ESTIMATED

Income Type / Year	DOWNTOWN TRADE AREA	MARKETPLACE TRADE AREA	MINNEAPOLIS-ST. PAUL MSA
Average Household Income			
1990	$ 42,036	$ 45,446	$ 43,716
2000	69,085	76,951	67,670
2006 E	79,803	90,901	76,477
2011 E	86,636	99,049	82,628
Median Household Income			
1990	$ 38,150	$ 43,250	$ 36,409
2000	61,343	66,887	54,571
2006 E	69,693	75,497	62,601
2011 E	76,059	81,989	68,762

E: Estimated.

Source: U.S. Census, Scan/US and McComb Group, Ltd.

Table B-3

FARMINGTON
DOWNTOWN AND MARKETPLACE TRADE AREAS AND MINNEAPOLIS-ST. PAUL MSA
HOUSEHOLD INCOME: 1990 AND 2000 CENSUS; 2006 AND 2011 ESTIMATED

	1990		2000		2006 E		2011 E	
	Number	Percent	Number	Percent	Number	Percent	Number	Percent
DOWNTOWN TRADE AREA								
Households	4,812	N/A	8,062	N/A	10,675	N/A	13,043	N/A
Average Size	3.00	N/A	2.98	N/A	2.80	N/A	2.67	N/A
Household Income								
Median	$ 38,150	N/A	$ 61,343	N/A	$ 69,693	N/A	$ 76,059	N/A
Average	$ 42,036	N/A	$ 69,085	N/A	$ 79,803	N/A	$ 86,636	N/A
Households Above $50,000	1,408	29.5 %	5,417	67.2 %	7,968	74.6 %	9,841	77.9 %
Households Above $75,000	333	7.0	2,582	32.0	4,903	45.9	6,845	54.2
Income Distribution								
Less than $15,000	539	11.3 %	377	4.7 %	383	3.6 %	400	3.2 %
$15,000 - $24,999	610	12.8	415	5.1	457	4.3	494	3.9
$25,000 - $34,999	831	17.4	716	8.9	675	6.3	704	5.6
$35,000 - $49,999	1,385	29.0	1,137	14.1	1,193	11.2	1,202	9.5
$50,000 - $74,999	1,075	22.5	2,835	35.2	3,065	28.7	2,996	23.7
$75,000 - $99,999	267	5.6	1,577	19.6	2,628	24.6	3,338	26.4
$100,000 - $149,999	46	1.0	791	9.8	1,742	16.3	2,636	20.9
$150,000 +	20	0.4	214	2.6	533	5.0	872	6.9
MARKETPLACE TRADE AREA								
Households	1,485	N/A	3,944	N/A	5,479	N/A	6,819	N/A
Average Size	3.27	N/A	3.22	N/A	3.01	N/A	2.86	N/A
Household Income								
Median	$ 43,250	N/A	$ 66,887	N/A	$ 75,497	N/A	$ 81,989	N/A
Average	$ 45,446	N/A	$ 76,951	N/A	$ 90,901	N/A	$ 99,049	N/A
Households Above $50,000	487	32.8 %	37,448	949.4 %	46,251	844.1 %	56,166	823.7 %
Households Above $75,000	99	6.7	25,650	650.3	34,117	622.7	43,755	641.7
Income Distribution								
Less than $15,000	53	3.6 %	2,852	5.3 %	3,025	4.7 %	3,256	4.4 %
$15,000 - $24,999	122	8.2	3,255	6.0	3,508	5.5	3,511	4.7
$25,000 - $34,999	259	17.4	3,917	7.2	4,002	6.2	4,398	5.9
$35,000 - $49,999	564	38.0	6,693	12.4	7,496	11.7	7,060	9.5
$50,000 - $74,999	388	26.1	11,798	21.8	12,134	18.9	12,411	16.7
$75,000 - $99,999	77	5.2	9,259	17.1	10,965	17.1	10,923	14.7
$100,000 - $149,999	20	1.3	9,443	17.4	13,228	20.6	17,768	23.9
$150,000 +	3	0.2	6,948	12.8	9,924	15.4	15,064	20.2
MINNEAPOLIS-ST. PAUL MSA								
Households	960,170	N/A	1,136,615	N/A	1,294,208	N/A	1,422,203	N/A
Average Size	2.59	N/A	2.56	N/A	2.41	N/A	2.31	N/A
Household Income								
Median	$ 36,409	N/A	$ 54,571	N/A	$ 62,601	N/A	$ 68,762	N/A
Average	$ 43,716	N/A	$ 67,670	N/A	$ 76,477	N/A	$ 82,628	N/A
Households Above $50,000	297,199	31.0 %	622,657	54.8 %	794,636	61.4 %	923,876	65.0 %
Households Above $75,000	108,546	11.3	357,444	31.4	513,201	39.7	639,773	45.0
Income Distribution								
Less than $15,000	159,335	16.6 %	104,761	9.2 %	99,435	7.7 %	99,550	7.0 %
$15,000 - $24,999	145,443	15.1	104,767	9.2	101,157	7.8	100,102	7.0
$25,000 - $34,999	151,575	15.8	125,176	11.0	120,082	9.3	125,439	8.8
$35,000 - $49,999	206,623	21.5	179,254	15.8	178,898	13.8	173,236	12.2
$50,000 - $74,999	188,653	19.6	265,213	23.3	281,435	21.7	284,103	20.0
$75,000 - $99,999	60,042	6.3	165,570	14.6	205,089	15.8	233,665	16.4
$100,000 - $149,999	30,956	3.2	124,913	11.0	197,859	15.3	251,556	17.7
$150,000 +	17,548	1.8	66,961	5.9	110,253	8.5	154,552	10.9

N/A: Not Available or Not Applicable
E: Estimated.

Source: U.S. Census, Scan/US and McComb Group, Ltd.

Table B-4

FARMINGTON
DOWNTOWN AND MARKETPLACE TRADE AREAS AND MINNEAPOLIS-ST. PAUL MSA
HOUSEHOLDS, FAMILIES AND HOUSEHOLD SIZE; 1990 AND 2000 CENSUS; 2006 AND 2011 ESTIMATED

	1990		2000		2006 E		2011 E	
	Number	Percent	Number	Percent	Number	Percent	Number	Percent
DOWNTOWN TRADE AREA								
Households	4,812		8,062		10,675		13,043	
Families	3,808		6,367		8,329		9,701	
As Percent of Households		79.1 %		79.0 %		78.0 %		74.4 %
Household Size								
1 Person	N/A	N/A %	1,245	15.4 %	1,861	17.4 %	2,432	19.2 %
2 Persons	N/A	N/A	2,267	28.1	3,403	31.9	4,301	34.0
3-4 Persons	N/A	N/A	3,454	42.8	4,246	39.8	4,733	37.4
5+ Persons	N/A	N/A	1,096	13.6	1,165	10.9	1,175	9.3
Average Household Size	3.00		2.98		2.80		2.67	
MARKETPLACE TRADE AREA								
Households	1,485		3,944		5,479		6,819	
Families	1,281		3,391		4,625		5,418	
As Percent of Households		86.3 %		86.0 %		84.4 %		79.5 %
Household Size								
1 Person	N/A	N/A %	805	20.4 %	1,178	21.5 %	1,507	22.1 %
2 Persons	N/A	N/A	1,274	32.3	1,983	36.2	3,266	47.9
3-4 Persons	N/A	N/A	1,436	36.4	1,792	32.7	1,527	22.4
5 + Persons	N/A	N/A	430	10.9	526	9.6	518	7.6
Average Household Size	3.27		3.22		3.01		2.86	
MINNEAPOLIS-ST. PAUL MSA								
Households	960,170		1,136,615		1,294,208		1,422,203	
Families	648,958		744,303		850,619		937,431	
As Percent of Households		67.6 %		65.5 %		65.7 %		65.9 %
Household Size								
1 Person	N/A	N/A %	303,050	26.7 %	373,040	28.8 %	428,860	30.2 %
2 Persons	N/A	N/A	370,926	32.6	453,239	35.0	518,534	36.5
3-4 Persons	N/A	N/A	348,717	30.7	360,713	27.9	382,746	26.9
5 + Persons	N/A	N/A	113,922	10.0	107,216	8.3	92,063	6.5
Average Household Size	2.59		2.56		2.41		2.31	

N/A: Not Available or Not Applicable.

E: Estimated.

Source: U.S. Census, Scan/US and McComb Group, Ltd.

Table B-4a

FARMINGTON
DOWNTOWN AND MARKETPLACE TRADE AREAS AND MINNEAPOLIS-ST. PAUL MSA
HOUSEHOLDS, FAMILIES AND HOUSEHOLD SIZE: 1990 AND 2000 CENSUS; 2006 AND 2011 ESTIMATED

	DOWNTOWN TRADE AREA	MARKETPLACE TRADE AREA	MINNEAPOLIS-ST. PAUL MSA
1990			
Families			
As Percent of Households	79.1 %	86.3 %	67.6 %
Household Size			
1 Person	N/A %	N/A %	N/A %
2 Persons	N/A	N/A	N/A
3-4 Persons	N/A	N/A	N/A
5+ Persons	N/A	N/A	N/A
2000			
Families			
As Percent of Households	79.0 %	86.0 %	65.5 %
Household Size			
1 Person	15.4 %	20.4 %	26.7 %
2 Persons	28.1	32.3	32.6
3-4 Persons	42.8	36.4	30.7
5+ Persons	13.6	10.9	10.0
2006 E			
Families			
As Percent of Households	78.0 %	84.4 %	65.7 %
Household Size			
1 Person	17.4 %	21.5 %	28.8 %
2 Persons	31.9	36.2	35.0
3-4 Persons	39.8	32.7	27.9
5+ Persons	10.9	9.6	8.3
2011 E			
Families			
As Percent of Households	74.4 %	79.5 %	65.9 %
Household Size			
1 Person	19.2 %	22.1 %	30.2 %
2 Persons	34.0	47.9	36.5
3-4 Persons	37.4	22.4	26.9
5+ Persons	9.3	7.6	6.5

N/A: Not Available or Not Applicable.

E: Estimated.

Source: U.S. Census, Scan/US and McComb Group, Ltd.

Table B-5

FARMINGTON
DOWNTOWN AND MARKETPLACE TRADE AREAS AND MINNEAPOLIS-ST. PAUL MSA
EDUCATIONAL ATTAINMENT: 1990 AND 2000 CENSUS; 2006 AND 2011 ESTIMATED

	1990		2000		2006 E		2011 E	
Attainment	Number	Percent	Number	Percent	Number	Percent	Number	Percent
DOWNTOWN TRADE AREA								
No College	3,416	47.4 %	4,115	31.7 %	4,530	27.2 %	4,494	23.3 %
Some College/2 yr. Degree	2,659	36.9	4,269	32.9	4,214	25.3	3,944	20.4
College Graduate	871	12.1	4,013	31.0	7,009	42.2	9,735	50.5
Graduate School	267	3.7	565	4.4	873	5.3	1,117	5.8
MARKETPLACE TRADE AREA								
No College	1,009	41.1 %	1,854	27.2 %	2,271	25.2 %	2,291	22.0 %
Some College/2 yr. Degree	1,027	41.8	2,213	32.4	2,175	24.2	2,004	19.2
College Graduate	331	13.5	2,483	36.4	4,137	45.9	5,586	53.6
Graduate School	90	3.7	273	4.0	424	4.7	545	5.2
MINNEAPOLIS-ST. PAUL MSA								
No College	493,826	35.3 %	482,956	30.6 %	519,351	26.5 %	540,598	25.4 %
Some College/2 yr. Degree	474,661	33.9	461,152	29.2	460,615	23.5	454,344	21.3
College Graduate	309,159	22.1	440,355	27.9	756,945	38.6	889,513	41.7
Graduate School	123,226	8.8	192,417	12.2	223,885	11.4	246,453	11.6

N/A: Not Available or Not Applicable.

E: Estimated.

Source: U.S. Census, Scan/US and McComb Group, Ltd.

Table B-5a

FARMINGTON
DOWNTOWN AND MARKETPLACE TRADE AREAS AND MINNEAPOLIS-ST. PAUL MSA
EDUCATIONAL ATTAINMENT: 1990 AND 2000 CENSUS; 2006 AND 2011 ESTIMATED

Year / Attainment	DOWNTOWN TRADE AREA	MARKETPLACE TRADE AREA	MINNEAPOLIS-ST. PAUL MSA
1990			
No College	47.4 %	41.1 %	35.3 %
Some College/2 yr. Degree	36.9	41.8	33.9
College Graduate	12.1	13.5	22.1
Graduate School	3.7	3.7	8.8
2000			
No College	31.7 %	27.2 %	30.6 %
Some College/2 yr. Degree	32.9	32.4	29.2
College Graduate	31.0	36.4	27.9
Graduate School	4.4	4.0	12.2
2006 E			
No College	27.2 %	25.2 %	26.5 %
Some College/2 yr. Degree	25.3	24.2	23.5
College Graduate	42.2	45.9	38.6
Graduate School	5.3	4.7	11.4
2011 E			
No College	23.3 %	22.0 %	25.4 %
Some College/2 yr. Degree	20.4	19.2	21.3
College Graduate	50.5	53.6	41.7
Graduate School	5.8	5.2	11.6

N/A: Not Available or Not Applicable.

E: Estimated.

Source: U.S. Census, Scan/US and McComb Group, Ltd.

Table B-6

FARMINGTON
DOWNTOWN AND MARKETPLACE TRADE AREAS AND MINNEAPOLIS-ST. PAUL MSA
GENDER AND MARITAL STATUS: 1990 AND 2000 CENSUS; 2006 AND 2011 ESTIMATED

	1990		2000		2006 E		2011 E	
Ethnicity	Number	Percent	Number	Percent	Number	Percent	Number	Percent
DOWNTOWN TRADE AREA								
Gender								
Male	7,275	50.2 %	12,251	50.8 %	15,272	51.0 %	17,245	51.0 %
Female	7,226	49.8	11,850	49.2	14,698	49.0	16,585	49.0
Marital Status								
Single	3,555	34.8 %	253	4.0 %	413	5.0 %	603	6.2 %
Single With Children	N/A	N/A	705	11.1	837	10.0	942	9.7
Married	6,673	65.2	5,411	85.0	7,079	85.0	8,156	84.1
MARKETPLACE TRADE AREA								
Gender								
Male	2,483	51.1	6,493	51.1	8,454	51.3	9,591	51.3
Female	2,374	48.9	6,207	48.9	8,025	48.7	9,089	48.7
Marital Status								
Single	845	26.7 %	92	2.8 %	191	4.1 %	295	5.4 %
Single With Children	N/A	N/A	328	9.8	400	8.6	458	8.5
Married	2,322	73.3	2,922	87.4	4,035	87.2	4,664	86.1
MINNEAPOLIS-ST. PAUL MSA								
Gender								
Male	1,242,014	48.9 %	1,466,277	49.4 %	1,579,480	49.6 %	1,668,298	49.8 %
Female	1,296,820	51.1	1,502,529	50.6	1,603,997	50.4	1,683,608	50.2
Marital Status								
Single	879,347	44.8 %	49,097	6.6 %	59,415	7.0 %	68,405	7.3 %
Single With Children	N/A	N/A	102,069	13.7	112,454	13.2	121,596	13.0
Married	1,084,372	55.2	593,137	79.7	678,750	79.8	747,430	79.7

1990 Marital Status data represents population numbers, while 2000 through 2011 respresents households

N/A: Not Available or Not Applicable.

E: Estimated.

Source: U.S. Census, Scan/US and McComb Group, Ltd.

Table B-6a

FARMINGTON
DOWNTOWN AND MARKETPLACE TRADE AREAS AND MINNEAPOLIS-ST. PAUL MSA
GENDER AND MARITAL STATUS: 1990 AND 2000 CENSUS; 2006 AND 2011 ESTIMATED

Ethnicity	DOWNTOWN TRADE AREA	MARKETPLACE TRADE AREA	MINNEAPOLIS-ST. PAUL MSA
1990			
Gender			
Male	50.2 %	51.1 %	48.9 %
Female	49.8	48.9	51.1
Marital Status			
Single	34.8 %	26.7 %	44.8 %
Single With Children	N/A	N/A	N/A
Married	65.2	73.3	55.2
2000			
Gender			
Male	50.8 %	51.1 %	49.4 %
Female	49.2	48.9	50.6
Marital Status			
Single	4.0 %	2.8 %	6.6 %
Single With Children	11.1	9.8	13.7
Married	85.0	87.4	79.7
2006 E			
Gender			
Male	51.0 %	51.3 %	49.6 %
Female	49.0	48.7	50.4
Marital Status			
Single	5.0 %	4.1 %	7.0 %
Single With Children	10.0	8.6	13.2
Married	85.0	87.2	79.8
2011 E			
Gender			
Male	51.0 %	51.3 %	49.8 %
Female	49.0	48.7	50.2
Marital Status			
Single	6.2 %	5.4 %	7.3 %
Single With Children	9.7	8.5	13.0
Married	84.1	86.1	79.7

N/A: Not Available or Not Applicable.

E: Estimated.

Source: U.S. Census, Scan/US and McComb Group, Ltd.

Table B-7

FARMINGTON
DOWNTOWN AND MARKETPLACE TRADE AREAS AND MINNEAPOLIS-ST. PAUL MSA
AGE DISTRIBUTION: 1990 AND 2000 CENSUS; 2006 AND 2011 ESTIMATED

	1990		2000		2006 E		2011 E	
Age Distribution	Number	Percent	Number	Percent	Number	Percent	Number	Percent
DOWNTOWN TRADE AREA								
Under 5	1,520	10.7 %	2,581	10.7 %	2,906	9.7 %	3,176	9.4 %
5 - 9	1,563	11.0	2,376	9.9	2,622	8.7	2,758	8.2
10 - 14	932	6.6	2,138	8.9	2,440	8.1	2,507	7.4
15 - 19	955	6.7	1,656	6.9	2,215	7.4	2,495	7.4
20 - 24	839	5.9	1,082	4.5	1,760	5.9	2,177	6.4
25 - 34	3,237	22.8	4,868	20.2	5,347	17.8	5,769	17.1
35 - 44	2,207	15.5	4,738	19.7	5,119	17.1	4,935	14.6
45 - 54	1,230	8.7	2,346	9.7	3,558	11.9	4,313	12.7
55 - 64	741	5.2	1,157	4.8	2,202	7.3	3,163	9.3
65 - 74	528	3.7	596	2.5	945	3.2	1,461	4.3
75 +	449	3.2	563	2.3	856	2.9	1,077	3.2
25 - 64	7,415	52.2 %	13,109	54.4 %	16,226	54.1 %	18,180	53.7 %
65 and Over	977	6.9	1,159	4.8	1,801	6.0	2,537	7.5
MARKETPLACE TRADE AREA								
Under 5	682	14.1 %	12,364	8.3 %	13,056	7.8 %	13,986	7.5 %
5 - 9	610	12.6	13,332	8.9	13,261	7.9	14,071	7.6
10 - 14	422	8.7	12,663	8.5	13,270	7.9	13,799	7.4
15 - 19	263	5.4	9,721	6.5	11,270	6.7	12,596	6.8
20 - 24	256	5.3	6,556	4.4	9,616	5.7	11,331	6.1
25 - 34	1,421	29.3	21,305	14.3	21,864	13.0	22,376	12.0
35 - 44	780	16.1	30,306	20.3	30,481	18.2	29,032	15.6
45 - 54	250	5.2	21,993	14.8	27,608	16.4	32,258	17.4
55 - 64	95	2.0	10,487	7.0	15,277	9.1	21,069	11.3
65 - 74	51	1.1	5,811	3.9	6,886	4.1	9,565	5.1
75 +	19	0.4	4,428	3.0	5,324	3.2	5,782	3.1
25 - 64	2,547	52.5 %	84,091	56.4 %	95,229	56.7 %	104,734	56.3 %
65 and Over	70	1.4	10,239	6.9	12,210	7.3	15,348	8.3
MINNEAPOLIS-ST. PAUL MSA								
Under 5	17,343	1.2 %	212,810	7.7 %	22,273	0.7 %	24,286	0.8 %
5 - 9	16,389	1.1	225,355	8.1	216,114	7.2	225,376	7.2
10 - 14	14,439	1.0	225,652	8.1	222,043	7.4	220,189	7.0
15 - 19	161,840	11.3	17,318	0.6	223,805	7.5	226,412	7.2
20 - 24	192,614	13.4	193,790	7.0	216,341	7.3	227,434	7.2
25 - 34	41,776	2.9	457,105	16.5	439,470	14.7	434,959	13.8
35 - 44	415,180	28.9	528,024	19.0	510,905	17.1	477,556	15.2
45 - 54	252,828	17.6	405,724	14.6	489,259	16.4	528,477	16.8
55 - 64	180,327	12.5	225,540	8.1	322,787	10.8	407,161	12.9
65 - 74	138,814	9.7	145,808	5.3	168,199	5.6	219,774	7.0
75 +	6,447	0.4	139,135	5.0	151,490	5.1	154,542	4.9
25 - 64	890,111	61.9 %	1,616,393	58.2 %	1,762,421	59.1 %	1,848,153	58.7 %
65 and Over	145,261	10.1	284,943	10.3	319,689	10.7	374,316	11.9

E: Estimated.

Source: U.S. Census, Scan/US and McComb Group, Ltd.

Table B-7a

FARMINGTON
DOWNTOWN AND MARKETPLACE TRADE AREAS AND MINNEAPOLIS-ST. PAUL MSA
AGE DISTRIBUTION: 1990 AND 2000 CENSUS; 2006 AND 2011 ESTIMATED

Age Distribution	DOWNTOWN TRADE AREA	MARKETPLACE TRADE AREA	MINNEAPOLIS-ST. PAUL MSA
1990			
Under 5	10.7 %	14.1 %	1.2 %
5 - 9	11.0	12.6	1.1
10 - 14	6.6	8.7	1.0
15 - 19	6.7	5.4	11.3
20 - 24	5.9	5.3	13.4
25 - 34	22.8	29.3	2.9
35 - 44	15.5	16.1	28.9
45 - 54	8.7	5.2	17.6
55 - 64	5.2	2.0	12.5
65 - 74	3.7	1.1	9.7
75 +	3.2	0.4	0.4
25 - 64	52.2 %	52.5 %	61.9 %
65 and Over	6.9	1.4	10.1
2000			
Under 5	10.7 %	8.3 %	7.7 %
5 - 9	9.9	8.9	8.1
10 - 14	8.9	8.5	8.1
15 - 19	6.9	6.5	0.6
20 - 24	4.5	4.4	7.0
25 - 34	20.2	14.3	16.5
35 - 44	19.7	20.3	19.0
45 - 54	9.7	14.8	14.6
55 - 64	4.8	7.0	8.1
65 - 74	2.5	3.9	5.3
75 +	2.3	3.0	5.0
25 - 64	54.4 %	56.4 %	58.2 %
65 and Over	4.8	6.9	10.3
2006 E			
Under 5	9.7 %	7.8 %	0.7 %
5 - 9	8.7	7.9	7.2
10 - 14	8.1	7.9	7.4
15 - 19	7.4	6.7	7.5
20 - 24	5.9	5.7	7.3
25 - 34	17.8	13.0	14.7
35 - 44	17.1	18.2	17.1
45 - 54	11.9	16.4	16.4
55 - 64	7.3	9.1	10.8
65 - 74	3.2	4.1	5.6
75 +	2.9	3.2	5.1
25 - 64	54.1 %	56.7 %	59.1 %
65 and Over	6.0	7.3	10.7
2011 E			
Under 5	9.4 %	7.5 %	0.8 %
5 - 9	8.2	7.6	7.2
10 - 14	7.4	7.4	7.0
15 - 19	7.4	6.8	7.2
20 - 24	6.4	6.1	7.2
25 - 34	17.1	12.0	13.8
35 - 44	14.6	15.6	15.2
45 - 54	12.7	17.4	16.8
55 - 64	9.3	11.3	12.9
65 - 74	4.3	5.1	7.0
75 +	3.2	3.1	4.9
25 - 64	53.7 %	56.3 %	58.7 %
65 and Over	7.5	8.3	11.9

E: Estimated.

Source: U.S. Census, Scan/US and McComb Group, Ltd.

Table B-8

FARMINGTON
DOWNTOWN AND MARKETPLACE TRADE AREAS AND MINNEAPOLIS-ST. PAUL MSA
ETHNICITY: 1990 AND 2000 CENSUS; 2006 AND 2011 ESTIMATED

Ethnicity	1990 Number	1990 Percent	2000 Number	2000 Percent	2006 E Number	2006 E Percent	2011 E Number	2011 E Percent
DOWNTOWN TRADE AREA								
Caucasian	14,235	98.2 %	22,922	95.1 %	28,072	93.7 %	31,186	92.2 %
African-American	91	0.6	195	0.8	339	1.1	572	1.7
Native American	57	0.4	91	0.4	83	0.3	82	0.2
Asian/Pacific Islander	87	0.6	419	1.7	771	2.6	1,171	3.5
Other	30	0.2	473	2.0	706	2.4	820	2.4
Hispanic (any race)	81	0.6 %	459	1.9 %	810	2.7 %	1,102	3.3 %
MARKETPLACE TRADE AREA								
Caucasian	102,772	97.6 %	139,476	94.7 %	153,777	93.9 %	171,957	92.5 %
African-American	56	0.1	1,796	1.2	3,061	1.9	4,839	2.6
Native American	32	0.0	433	0.3	561	0.3	671	0.4
Asian/Pacific Islander	32	0.0	4,045	2.7	5,935	3.6	8,340	4.5
Other	3	0.0	1,549	1.1	379	0.2	59	0.0
Hispanic (any race)	35	0.0 %	3,815	2.6 %	5,765	3.5 %	8,021	4.3 %
MINNEAPOLIS-ST. PAUL MSA								
Caucasian	2,343,908	92.3 %	2,556,851	88.0 %	2,660,079	83.6 %	2,737,139	81.7 %
African-American	90,055	3.5	157,963	5.4	205,332	6.4	243,820	7.3
Native American	24,251	1.0	21,590	0.7	18,686	0.6	16,587	0.5
Asian/Pacific Islander	65,580	2.6	124,025	4.3	171,264	5.4	210,566	6.3
Other	15,040	0.6	46,083	1.6	128,116	4.0	143,794	4.3
Hispanic (any race)	37,903	1.5 %	99,121	3.4 %	145,591	4.6 %	180,608	5.4 %

E: Estimated.

Source: U.S. Census, Scan/US and McComb Group, Ltd.

Table B-8a

FARMINGTON
DOWNTOWN AND MARKETPLACE TRADE AREAS AND MINNEAPOLIS-ST. PAUL MSA
ETHNICITY: 1990 AND 2000 CENSUS; 2006 AND 2011 ESTIMATED

Year / Ethnicity	DOWNTOWN TRADE AREA	MARKETPLACE TRADE AREA	MINNEAPOLIS-ST. PAUL MSA
1990			
Caucasian	98.2 %	97.6 %	92.3 %
African-American	0.6	0.1	3.5
Native American	0.4	0.0	1.0
Asian/Pacific Islander	0.6	0.0	2.6
Other	0.2	0.0	0.6
Hispanic (any race)	0.6 %	0.0 %	1.5 %
2000			
Caucasian	95.1 %	94.7 %	88.0 %
African-American	0.8	1.2	5.4
Native American	0.4	0.3	0.7
Asian/Pacific Islander	1.7	2.7	4.3
Other	2.0	1.1	1.6
Hispanic (any race)	1.9 %	2.6 %	3.4 %
2006 E			
Caucasian	93.7 %	93.9 %	83.6 %
African-American	1.1	1.9	6.4
Native American	0.3	0.3	0.6
Asian/Pacific Islander	2.6	3.6	5.4
Other	2.4	0.2	4.0
Hispanic (any race)	2.7 %	3.5 %	4.6 %
2011 E			
Caucasian	92.2 %	92.5 %	81.7 %
African-American	1.7	2.6	7.3
Native American	0.2	0.4	0.5
Asian/Pacific Islander	3.5	4.5	6.3
Other	2.4	0.0	4.3
Hispanic (any race)	3.3 %	4.3 %	5.4 %

E: Estimated.

Source: U.S. Census, Scan/US and McComb Group, Ltd.

Appendix C

RETAIL AND SERVICES PURCHASING POWER

Table C-1

DOWNTOWN FARMINGTON TRADE AREA
RETAIL PURCHASING POWER, 1997 TO 2030
(In Thousands of Dollars)

Merchandise Category	1997	2000	2005	2010	2015	2020	2025	2030
General Merchandise	**$ 20,647**	**$ 28,355**	**$ 39,246**	**$ 52,650**	**$ 67,869**	**$ 85,437**	**$ 105,774**	**$ 129,096**
Department stores (Incl. leased depts.)	17,860	24,528	36,261	48,645	62,706	78,938	97,728	119,276
Discount stores	13,259	18,209	26,332	35,325	45,536	57,323	70,968	86,616
Department Stores	4,601	6,319	9,929	13,320	17,170	21,615	26,760	32,660
Other general merchandise stores	2,787	3,827	2,985	4,005	5,163	6,499	8,046	9,820
Warehouse Clubs & Supercenters	NA	NA	2,482	3,330	4,293	5,404	6,690	8,165
Variety stores	231	317	503	675	870	1,095	1,356	1,655
Miscellaneous general mdse.	2,556	3,510	2,482	3,330	4,293	5,404	6,690	8,165
Apparel and accessories	$ 6,975	$ 9,580	$ 14,285	$ 19,164	$ 24,704	$ 31,098	$ 38,502	$ 46,990
Furniture & home furnishings	5,212	7,157	11,438	15,345	19,781	24,901	30,828	37,625
Electronics & appliance	6,250	8,583	12,277	16,470	21,231	26,727	33,088	40,384
Other shopping goods	10,060	13,816	21,501	28,841	37,177	46,803	57,943	70,718
Total Shopping Goods	**$ 49,144**	**$ 67,491**	**$ 98,747**	**$ 132,470**	**$ 170,762**	**$ 214,966**	**$ 266,135**	**$ 324,813**
Food Service & Drinking	**$ 17,200**	**$ 23,622**	**$ 37,134**	**$ 49,815**	**$ 64,214**	**$ 80,836**	**$ 100,077**	**$ 122,145**
Convenience Goods	**$ 35,176**	**$ 48,308**	**$ 72,691**	**$ 97,515**	**$ 125,702**	**$ 158,242**	**$ 195,910**	**$ 239,103**
Food stores	24,836	34,107	48,035	64,440	83,067	104,570	129,461	158,004
Drug & proprietary stores	5,277	7,248	14,357	19,260	24,827	31,254	38,694	47,225
Hardware stores	1,237	1,699	2,482	3,330	4,293	5,404	6,690	8,165
Beer, wine & liquor stores	3,001	4,122	6,206	8,325	10,731	13,509	16,725	20,413
Florists	660	906	1,208	1,620	2,088	2,629	3,255	3,972
Health supplement stores	165	226	403	540	696	876	1,085	1,324
Gasoline Service Stations & Conv.	**$ 15,271**	**$ 20,972**	**$ 28,478**	**$ 38,205**	**$ 49,249**	**$ 61,997**	**$ 76,754**	**$ 93,677**
Other Stores	**$ 65,983**	**$ 90,615**	**$ 116,462**	**$ 156,240**	**$ 201,402**	**$ 253,535**	**$ 313,890**	**$ 383,096**
Building materials & supply stores	15,403	21,153	22,977	30,825	39,735	50,022	61,928	75,583
Lawn & garden equipment	1,913	2,627	3,086	4,140	5,337	6,718	8,318	10,151
Used merchandise stores	396	544	637	855	1,102	1,387	1,718	2,096
Motor vehicles & parts dealers	48,271	66,291	89,762	120,420	155,228	195,408	241,926	295,266
Total	**$ 182,774**	**$ 251,008**	**$ 353,512**	**$ 474,245**	**$ 611,329**	**$ 769,576**	**$ 952,766**	**$ 1,162,834**

NA: Not Available.
Source: McComb Group, Ltd.

Table C-1 (continued)

DOWNTOWN FARMINGTON TRADE AREA
RETAIL PURCHASING POWER, 1997 TO 2030
(In Thousands of Dollars)

Merchandise Category	1997	2000	2005	2010	2015	2020	2025	2030
Shopping Goods								
General Merchandise								
Department stores (Incl. leased depts.)	**$ 17,860**	**$ 24,528**	**$ 36,261**	**$ 48,645**	**$ 62,706**	**$ 78,938**	**$ 97,728**	**$ 119,276**
Discount stores	13,259	18,209	26,332	35,325	45,536	57,323	70,968	86,616
Department Stores	4,601	6,319	9,929	13,320	17,170	21,615	26,760	32,660
Other general merchandise stores	**2,787**	**3,827**	**2,985**	**4,005**	**5,163**	**6,499**	**8,046**	**9,820**
Warehouse Clubs and Supercenters	NA	NA	2,482	3,330	4,293	5,404	6,690	8,165
Variety stores	231	317	503	675	870	1,095	1,356	1,655
Miscellaneous general mdse.	2,556	3,510	2,482	3,330	4,293	5,404	6,690	8,165
Subtotal	$ 20,647	$ 28,355	$ 39,246	$ 52,650	$ 67,869	$ 85,437	$ 105,774	$ 129,096
Apparel and accessories	$ 6,975	$ 9,580	$ 14,285	$ 19,164	$ 24,704	$ 31,098	$ 38,502	$ 46,990
Furniture & home furnishings	5,212	7,157	11,438	15,345	19,781	24,901	30,828	37,625
Electronics & appliance	6,250	8,583	12,277	16,470	21,231	26,727	33,088	40,384
Other shopping goods	10,060	13,816	21,501	28,841	37,177	46,803	57,943	70,718
Total Shopping Goods	**$ 49,144**	**$ 67,491**	**$ 98,747**	**$ 132,470**	**$ 170,762**	**$ 214,966**	**$ 266,135**	**$ 324,813**
Food Service & Drinking Places								
Food Service	$ 16,211	$ 22,263	$ 35,289	$ 47,340	$ 61,024	$ 76,820	$ 95,105	$ 116,076
Drinking Places	989	1,359	1,845	2,475	3,190	4,016	4,972	6,069
Convenience Goods								
Food stores	$ 24,836	$ 34,107	$ 48,035	$ 64,440	$ 83,067	$ 104,570	$ 129,461	$ 158,004
Drug & proprietary stores	5,277	7,248	14,357	19,260	24,827	31,254	38,694	47,225
Liquor stores	3,001	4,122	6,206	8,325	10,731	13,509	16,725	20,413
Hardware	1,237	1,699	2,482	3,330	4,293	5,404	6,690	8,165
Florists	660	906	1,208	1,620	2,088	2,629	3,255	3,972
Health supplement stores	165	226	403	540	696	876	7,865	9,599
Subtotal	$ 35,176	$ 48,308	$ 72,288	$ 96,975	$ 125,006	$ 157,366	$ 194,825	$ 237,779
TOTAL	**$ 101,520**	**$ 139,421**	**$ 208,169**	**$ 279,260**	**$ 359,982**	**$ 453,168**	**$ 561,037**	**$ 684,737**

Table C-1 (continued)

DOWNTOWN FARMINGTON TRADE AREA
RETAIL PURCHASING POWER, 1997 TO 2030
(In Thousands of Dollars)

Merchandise Category	1997	2000	2005	2010	2015	2020	2025	2030
CONVENIENCE GOODS								
Food Stores	**$ 24,836**	**$ 34,107**	**$ 48,035**	**$ 64,440**	**$ 83,067**	**$ 104,570**	**$ 129,461**	**$ 158,004**
Grocery stores	22,445	30,823	46,794	62,775	80,921	101,868	126,116	153,922
Supermarkets	21,802	29,940	45,888	61,560	79,355	99,896	123,675	150,943
Convenience Stores	643	883	906	1,215	1,566	1,972	2,441	2,979
Specialty food stores	610	838	1,107	1,485	1,914	2,410	2,983	3,641
Meat Markets	N/A	N/A	369	495	638	803	994	1,214
Fish & Seafood Markets	N/A	N/A	134	180	232	292	362	441
Fruit & Vegetable Markets	N/A	N/A	235	315	406	511	633	772
Other Specialty Food Stores	N/A	N/A	369	495	638	803	994	1,214
Baked Goods	N/A	N/A	134	180	232	292	362	441
Confectionery and Nut Stores	N/A	N/A	101	135	174	219	271	331
All Other Specialty Food Stores	1,781	2,446	134	180	232	292	362	441
Other Convenience Goods	**$ 10,340**	**$ 14,201**	**$ 24,656**	**$ 33,075**	**$ 42,635**	**$ 53,672**	**$ 66,449**	**$ 81,099**
Drug	5,277	7,248	14,357	19,260	24,827	31,254	38,694	47,225
Hardware	1,237	1,699	2,482	3,330	4,293	5,404	6,690	8,165
Liquor	3,001	4,122	6,206	8,325	10,731	13,509	16,725	20,413
Florist	660	906	1,208	1,620	2,088	2,629	3,255	3,972
Food/health supplement store	165	226	403	540	696	876	1,085	1,324
Total Convenience Goods	**$ 35,176**	**$ 48,308**	**$ 72,691**	**$ 97,515**	**$ 125,702**	**$ 158,242**	**$ 195,910**	**$ 239,103**
Food Service & Drinking Places	**$ 17,200**	**$ 23,622**	**$ 37,134**	**$ 49,815**	**$ 64,214**	**$ 80,836**	**$ 100,077**	**$ 122,145**
Food Service	**16,211**	**22,263**	**37,202**	**49,905**	**64,330**	**80,981**	**100,257**	**122,365**
Full-service restaurants	7,982	10,962	16,638	22,320	28,772	36,220	44,841	54,728
Limited service restaurants	5,673	7,791	12,277	16,470	21,231	26,727	33,088	40,384
Cafeterias	66	91	503	675	870	1,095	1,356	1,655
Snack & beverage places	874	1,200	1,913	2,565	3,306	4,161	5,152	6,289
Ice Cream & Soft Serve	N/A	N/A	302	405	522	657	814	993
Frozen Yogurt	N/A	N/A	34	45	58	73	90	110
Doughnut Shops	N/A	N/A	403	540	696	876	1,085	1,324
Bagel Shops	N/A	N/A	201	270	348	438	542	662
Coffee Shops	N/A	N/A	570	765	986	1,241	1,537	1,876
Cookie Shops	N/A	N/A	34	45	58	73	90	110
Other Snack Shops	N/A	N/A	369	495	638	803	994	1,214
Specialized food places	1,616	2,219	3,958	5,310	6,845	8,617	10,668	13,020
Drinking Places	**$ 989**	**$ 1,359**	**1,845**	**2,475**	**$ 3,190**	**$ 4,016**	**$ 4,972**	**$ 6,069**
Gasoline Svs Stations/Conv.	**$ 15,271**	**$ 20,972**	**$ 28,478**	**$ 38,205**	**$ 49,249**	**$ 61,997**	**$ 76,754**	**$ 93,677**
Gas/Convenience food store	13,094	17,982	25,560	34,290	44,202	55,644	68,889	84,078
Other Gas Stations & Truck Stops	2,177	2,990	2,918	3,915	5,047	6,353	7,865	9,599

DOWNTOWN FARMINGTON TRADE AREA
RETAIL PURCHASING POWER, 1997 TO 2030
(In Thousands of Dollars)

Merchandise Category	1997	2000	2005	2010	2015	2020	2025	2030
SHOPPING GOODS								
General Merchandise	**$ 20,647**	**$ 28,355**	**$ 39,246**	**$ 52,650**	**$ 67,869**	**$ 85,437**	**$ 105,774**	**$ 129,096**
Department stores (Incl. leased depts.)	**17,860**	**24,528**	**36,261**	**48,645**	**62,706**	**78,938**	**97,728**	**119,276**
Discount stores	13,259	18,209	26,332	35,325	45,536	57,323	70,968	86,616
Conventional	4,601	6,319	9,929	13,320	17,170	21,615	26,760	32,660
Other general merchandise stores	**2,787**	**3,827**	**2,985**	**4,005**	**5,163**	**6,499**	**8,046**	**9,820**
Warehouse clubs and Supercenters	NA	NA	2,482	3,330	4,293	5,404	6,690	8,165
Variety stores	231	317	503	675	870	1,095	1,356	1,655
Miscellaneous general mdse.	2,556	3,510	2,482	3,330	4,293	5,404	6,690	8,165
Apparel & Accessories	**$ 6,975**	**$ 9,580**	**$ 14,285**	**$ 19,164**	**$ 24,704**	**$ 31,098**	**$ 38,502**	**$ 46,990**
Clothing Stores	**5,887**	**8,085**	**12,277**	**16,470**	**21,231**	**26,726**	**33,089**	**40,383**
Mens and boys	412	566	604	810	1,044	1,314	1,627	1,986
Womens clothing	1,468	2,016	2,918	3,915	5,047	6,353	7,865	9,599
Children's & infant	264	362	704	945	1,218	1,533	1,899	2,317
Family clothing	3,150	4,326	6,910	9,270	11,950	15,043	18,624	22,730
Clothing accessories stores	82	113	235	315	406	511	633	772
Other clothing stores	511	702	906	1,215	1,566	1,972	2,441	2,979
Shoe Stores	**1,088**	**1,495**	**2,008**	**2,694**	**3,473**	**4,372**	**5,413**	**6,607**
Men's	99	136	119	160	207	260	322	393
Women's	148	204	145	194	250	315	390	476
Children's & infant	33	45	67	90	116	146	181	221
Family shoe stores	511	702	1,140	1,530	1,972	2,483	3,074	3,752
Athletic footwear	297	408	537	720	928	1,168	1,446	1,765
Furniture & Home Furnishings	**$ 5,212**	**$ 7,157**	**$ 11,438**	**$ 15,345**	**$ 19,781**	**$ 24,901**	**$ 30,828**	**$ 37,625**
Furniture	2,672	3,669	5,736	7,695	9,919	12,487	15,459	18,868
Home furnishings stores	2,540	3,488	5,702	7,650	9,862	12,414	15,369	18,757
Floor coverings	1,583	2,174	2,918	3,915	5,047	6,353	7,865	9,599
Window treatment stores	49	68	134	180	232	292	362	441
All other home furnishings stores	891	1,223	2,684	3,600	4,641	5,842	7,232	8,827
Electronics & Appliances Stores	**$ 6,250**	**$ 8,583**	**$ 12,277**	**$ 16,470**	**$ 21,231**	**$ 26,727**	**$ 33,088**	**$ 40,384**
Appliance, tv and other electronics	3,595	4,937	9,962	13,365	17,228	21,688	26,850	32,771
Household appliance stores	561	770	1,744	2,340	3,016	3,797	4,701	5,738
Radio, tv & electronics stores	3,034	4,167	8,218	11,025	14,212	17,891	22,149	27,033
Computers and Software	2,655	3,646	2,315	3,105	4,003	5,039	6,238	7,613
Other Shopping Goods	**$ 9,005**	**$ 12,367**	**$ 21,098**	**$ 28,301**	**$ 36,481**	**$ 45,927**	**$ 56,858**	**$ 69,394**
Sporting goods	2,210	3,035	4,294	5,760	7,425	9,347	11,572	14,124
General Line Sporting Gds.	973	1,336	1,845	2,475	3,190	4,016	4,972	6,069
Specialty Line Sporting Gds.	1,237	1,699	2,449	3,285	4,235	5,331	6,600	8,055
Book stores & newsdealers	709	974	1,376	1,845	2,378	2,994	3,707	4,524
Stationery Stores and Office Supply	N/A	N/A	2,046	2,745	3,538	4,454	5,515	6,731
Musical Instrument & Supplies	N/A	N/A	906	1,215	1,566	1,972	2,441	2,979
Jewelry stores	1,072	1,472	2,315	3,105	4,003	5,039	6,238	7,613
Hobby, toy & game	1,039	1,427	1,677	2,250	2,900	3,651	4,520	5,517
Camera & photographic supply	297	408	772	1,035	1,334	1,680	2,079	2,538
Gift, novelty & souvenirs	1,187	1,631	2,147	2,880	3,713	4,673	5,786	7,062
Luggage & leather goods	115	159	134	180	232	292	362	441
Sewing, needlework & piece goods	297	408	839	1,125	1,450	1,826	2,260	2,758
Pet stores	627	861	1,241	1,665	2,146	2,702	3,345	4,083
Art dealers	165	226	302	405	522	657	814	993
Optical goods stores	594	815	1,006	1,350	1,740	2,191	2,712	3,310
Pre-Recorded Tapes, Compact Discs	NA	NA	607	815	1,051	1,322	1,637	1,998
Cosmetics, beauty supplies & perfume	330	453	597	801	1,033	1,301	1,610	1,965
All other health & personal care	363	498	839	1,125	1,450	1,826	2,260	2,758
Total Shopping Goods	**$ 48,089**	**$ 66,042**	**$ 98,344**	**$ 131,930**	**$ 170,066**	**$ 214,090**	**$ 265,050**	**$ 323,489**

Table C-1 (continued)

DOWNTOWN FARMINGTON TRADE AREA
RETAIL PURCHASING POWER, 1997 TO 2030
(In Thousands of Dollars)

Merchandise Category	1997	2000	2005	2010	2015	2020	2025	2030
OTHER RETAIL STORES								
Building Materials & Garden Supplies	**$ 17,316**	**$ 23,780**	**$ 26,063**	**$ 34,965**	**$ 45,072**	**$ 56,740**	**$ 70,246**	**$ 85,734**
Building materials & supplies stores	15,403	21,153	22,977	30,825	39,735	50,022	61,928	75,583
Home centers	4,519	6,205	9,694	13,005	16,764	21,104	26,127	31,888
Paint, glass & wallpaper	610	838	1,040	1,395	1,798	2,264	2,803	3,421
Other building materials dealers	10,274	14,110	12,243	16,425	21,173	26,654	32,998	40,274
Lawn & garden equipment	1,913	2,627	3,086	4,140	5,337	6,718	8,318	10,151
Outdoor power equipment	363	498	637	855	1,102	1,387	1,718	2,096
Retail nurseries, lawn & garden	1,550	2,129	2,449	3,285	4,235	5,331	6,600	8,055
Used Merchandise Stores	**$ 396**	**$ 544**	**$ 637**	**$ 855**	**$ 1,102**	**$ 1,387**	**$ 1,718**	**$ 2,096**
Motor Vehicles & Parts Dealers	**$ 48,271**	**$ 66,291**	**$ 89,762**	**$ 120,420**	**$ 155,228**	**$ 195,408**	**$ 241,926**	**$ 295,266**
Automotive dealers	41,229	56,620	78,123	104,805	135,101	170,071	210,555	256,979
New and used car dealers	40,091	55,057	74,836	100,395	129,416	162,915	201,695	246,166
Used car dealers	1,138	1,563	3,287	4,410	5,685	7,156	8,860	10,813
Misc. auto dealers	2,292	3,148	6,138	8,235	10,614	13,362	16,544	20,192
Boat dealers	841	1,155	1,845	2,475	3,190	4,016	4,972	6,069
Recreational vehicle dealers	544	747	1,509	2,025	2,610	3,286	4,068	4,965
Motorcycle dealers	561	770	2,113	2,835	3,654	4,600	5,696	6,951
Automotive dealers, nec	346	476	671	900	1,160	1,460	1,808	2,207
Auto parts, accessories & tires	4,750	6,523	5,501	7,380	9,513	11,975	14,827	18,095
Auto parts & accessories stores	3,612	4,960	3,388	4,545	5,859	7,375	9,131	11,144
Tire dealers	1,138	1,563	2,113	2,835	3,654	4,600	5,696	6,951
Total Other Retail Stores	**$ 65,983**	**$ 90,615**	**$ 116,462**	**$ 156,240**	**$ 201,402**	**$ 253,535**	**$ 313,890**	**$ 383,096**

Table C-2

DOWNTOWN FARMINGTON TRADE AREA
SERVICES PURCHASING POWER, 1997 TO 2030
(In Thousands of Dollars)

Services Category	1997	2000	2005	2010	2015	2020	2025	2030
PERSONAL SERVICES	$ **4,405**	$ **5,142**	$ **16,117**	$ **21,951**	$ **29,683**	$ **40,407**	$ **55,002**	$ **74,871**
Personal care services	1,521	1,776	3,813	5,194	7,023	9,560	13,014	17,715
Hair, nail & skin care services	1,341	1,565	3,242	4,416	5,971	8,128	11,064	15,061
Barber shops	21	25	93	127	171	233	317	432
Beauty Shops	1,289	1,505	2,976	4,054	5,481	7,462	10,157	13,826
Nail salons	34	40	173	235	318	433	589	802
Other personal care services	181	211	571	778	1,052	1,432	1,950	2,654
Diet & weight reducing services	52	60	266	362	489	666	907	1,234
Other personal care services	125	145	306	416	563	766	1,043	1,420
Drycleaning & laundry services	$ **572**	$ **667**	$ **2,179**	$ **2,968**	$ **4,013**	$ **5,463**	$ **7,436**	$ **10,123**
Coin-operated laundries & drycleaners	103	120	372	507	685	933	1,270	1,728
Drycleaning & laundry services (except coin-op.)	464	542	824	1,122	1,517	2,065	2,811	3,827
Laundries, family & commercial	26	30	93	127	171	233	317	432
Drycleaning plants	413	482	651	887	1,199	1,632	2,222	3,024
Garment pressing & agents for laundries	30	35	66	90	122	167	227	309
Other personal services	$ **2,312**	$ **2,699**	$ **10,125**	$ **13,790**	$ **18,647**	$ **25,383**	$ **34,552**	$ **47,033**
Photofinishing	1,375	1,605	757	1,032	1,395	1,899	2,585	3,518
Photofinishing Laboratories	937	1,094	611	832	1,126	1,532	2,086	2,839
One Hour Photo Finishing	937	1,094	146	199	269	366	499	679
Other Personal Services	0	0	0	0	0	0	0	0
Child Day Care Services	937	1,094	2,843	3,873	5,237	7,129	9,704	13,209
Funeral Homes & Funeral Services	937	1,094	797	1,086	1,468	1,999	2,721	3,703
Photographic Services	937	1,094	2,790	3,800	5,139	6,995	9,522	12,962
Photographic Studios	937	1,094	890	1,212	1,640	2,232	3,038	4,135
Veteranarian Services	937	1,094	1,780	2,425	3,279	4,464	6,076	8,271
Pet Care	937	1,094	266	362	489	666	907	1,234
RENTAL AND LEASING	$ **640**	$ **747**	$ **1,076**	$ **1,466**	**1,982**	$ **2,698**	$ **3,673**	$ **5,000**
Formalwear & costume rental	47	55	106	145	196	266	363	494
Video tape and disk rental	593	692	970	1,321	1,786	2,432	3,310	4,506
RECREATION	$ **2,171**	$ **2,142**	$ **5,739**	$ **7,818**	**10,571**	$ **14,390**	$ **19,589**	$ **26,664**
Bowling centers	335		611	832	$ 1,126	1,532	2,086	2,839
Physical fitness facilites	1,135	1,324	2,976	4,054	5,481	7,462	10,157	13,826
Golf courses and country clubs	701	818	2,152	2,932	3,964	5,396	7,346	9,999
PROFESSIONAL SERVICES	**$ 3,576**	**$ 4,174**	**$ 11,001**	**$ 14,984**	**$ 20,262**	**$ 27,582**	**$ 37,545**	**$ 51,107**
Offices of real estate agents & brokers	3,120	3,642	9,739	13,265	17,937	24,417	33,237	45,243
Offices of real estate appraisers	456	532	1,262	1,719	2,325	3,165	4,308	5,864

Source: McComb Group, Ltd.

Table C-2 (continued)

DOWNTOWN FARMINGTON TRADE AREA
SERVICES PURCHASING POWER, 1997 TO 2030
(In Thousands of Dollars)

Services Category	1997	2000	2005	2010	2015	2020	2025	2030
REPAIR SERVICES	$ **5,299**	$ **6,186**	$ **10,922**	$ **14,875**	$ **20,115**	$ **27,382**	$ **37,273**	$ **50,737**
General automotive repair	$ **1,960**	$ **2,288**	$ **4,584**	$ **6,243**	$ **8,442**	$ **11,492**	$ **15,644**	$ **21,295**
Automotive exhaust system repair	168	196	120	163	220	300	408	556
Automotive transmission repair	185	216	292	398	538	733	998	1,358
Carburetor repair shops	30	35	319	434	587	799	1,088	1,481
Brake, front end & wheel alignment	185	216	226	308	416	566	771	1,049
Electrical repair shops, motor vehicle	34	40	40	54	73	100	136	185
Paint or body repair shops	1,582	1,846	3,255	4,434	5,995	8,161	11,109	15,122
Automotive glass replacement	503	587	997	1,357	1,835	2,498	3,401	4,629
Automotive oil change & lubrication shops	232	271	478	651	881	1,199	1,632	2,222
Carwashes	340	396	598	814	1,101	1,499	2,040	2,778
Personal & household goods repair & maint.	$ **473**	$ **552**	$ **930**	$ **1,267**	$ **1,713**	$ **2,332**	$ **3,174**	$ **4,321**
Home & garden equipment & appliance repair & maint.	266	311	306	416	563	766	1,043	1,420
Home & garden equipment repair & maint.	56	65	53	72	98	133	181	247
Appliance repair & maint.	211	246	252	344	465	633	862	1,173
Reupholstery & furniture repair	112	130	213	290	392	533	726	988
Footwear & leather goods repair	26	30	27	36	49	67	91	123
Watch, clock & jewelry repair	26	30	53	72	98	133	181	247
Garment repair & alteration services	39	45	40	54	73	100	136	185

Source: McComb Group, Ltd.

Table C-2 (continued)

DOWNTOWN FARMINGTON TRADE AREA
SERVICES PURCHASING POWER, 1997 TO 2030
(In Thousands of Dollars)

Services Category	1997	2000	2005	2010	2015	2020	2025	2030
HEALTH CARE	$ **16,456**	$ **19,210**	$ **28,234**	$ **38,455**	$ **52,001**	$ **70,787**	$ **96,356**	$ **131,163**
Offices of physicians	10,310	12,036	16,595	22,603	30,564	41,606	56,635	77,093
Offices of physicians (except mental health specialists)	10,078	11,765	16,223	22,096	29,879	40,673	55,365	75,365
Offices of physicians, mental health specialists	236	276	372	507	685	933	1,270	1,728
Offices of dentists	3,795	4,430	6,112	8,324	11,257	15,323	20,858	28,393
Offices of other health practitioners	2,347	2,739	3,773	5,139	6,950	9,460	12,878	17,530
Offices of chiropractors	765	893	1,236	1,683	2,276	3,098	4,217	5,740
Offices of optometrists	271	316	438	597	808	1,099	1,496	2,037
Offices of mental health practitioners (except physicians)	215	251	345	471	636	866	1,179	1,605
Offices of physical, occup, & speech therapists & audiologists	653	763	1,050	1,430	1,933	2,632	3,582	4,876
Speech therapist & audiologists	43	50	66	90	122	167	227	309
Physical & occupational therapists	610	712	983	1,339	1,811	2,465	3,355	4,568
Offices of all other health practitioners	438	512	704	959	1,297	1,766	2,403	3,271
Offices of podiatrists	69	80	106	145	196	266	363	494
Offices of all other misc. health practitioners	370	431	598	814	1,101	1,499	2,040	2,778
Outpatient care centers	**1,427**	**1,666**	**2,299**	**3,131**	**4,233**	**5,763**	**7,844**	**10,678**
Outpatient mental health & substance abuse centers	713	833	1,143	1,556	2,105	2,865	3,900	5,308
Other outpatient care centers	713	833	1,143	1,556	2,105	2,865	3,900	5,308
Kidney dialysis centers	292	341	465	633	856	1,166	1,587	2,160
All other outpatient care centers	421	492	678	923	1,248	1,699	2,313	3,148
Home health care services	1,289	1,505	2,073	2,823	3,817	5,197	7,074	9,629
Subtotal - Health Care	$ 19,167	$ 22,376	$ 30,533	$ 41,586	$ 56,234	$ 76,550	$ 104,200	$ 141,841

Source: McComb Group, Ltd.

Appendix D

RETAIL AND SERVICES PURCHASING POWER, MARKET SHARE AND SALES POTENTIAL

Table D-1

DOWNTOWN FARMINGTON TRADE AREA
RETAIL PURCHASING POWER, MARKET SHARE AND SALES POTENTIAL, 201
BY MERCHANDISE CATEGORY
(In Thousands of Dollars)

Merchandise Category	Resident Purchasing Power	Estimated Market Share	Trade Area Sales	Trade Area Percent	Other Shoppers	Estimated Total Sales
SHOPPING GOODS						
General Merchandise						
Department stores (Incl. leased depts.)						
Discount stores	$ 35,325	15.0%	$ 5,299	70%	$ 2,271	$ 7,570
Department Stores	13,320	20.0	2,664	70	1,142	3,806
Other general merchandise stores	4,005	20.0	801	75	267	1,068
Warehouse Club & Supercenters	3,330	40.0	1,332	70	571	1,903
Variety stores	675	20.0	135	70	58	193
Miscellaneous general mdse.	3,330	20.0	666	70	285	951
Apparel & Accessories	$ 19,164	20.0%	$ 3,833	75%	$ 1,278	$ 5,111
Clothing Stores	16,470	20.0	3,294	75	1,098	4,392
Mens and boys	810	20.0	162	75	54	216
Womens clothing	3,915	20.0	783	75	261	1,044
Children's & infant	945	20.0	189	75	63	252
Family clothing	9,270	20.0	1,854	75	618	2,472
Clothing accessories stores	315	20.0	63	75	21	84
Other clothing stores	1,215	20.0	243	75	81	324
Shoe Stores	$ 2,694	20.0	$ 539	75	180	719
Men's	160	20.0	32	75	11	43
Women's	194	20.0	39	75	13	52
Children's & infant	90	20.0	18	75	6	24
Family shoe stores	1,530	20.0	306	75	102	408
Athletic footwear	720	20.0	144	75	48	192
Furniture & Home Furnishings	$ 15,345	20.0%	$ 3,069	75%	$ 1,023	$ 4,092
Furniture	7,695	20.0	1,539	75	513	2,052
Floor coverings	3,915	20.0	783	75	261	1,044
Window treatment stores	180	20.0	36	75	12	48
All other home furnishings stores	3,600	20.0	720	75	240	960
Electronics & Appliances Stores	$ 16,470	20.0%	$ 3,294	75%	$ 1,098	$ 4,392
Household appliance stores	2,340	20.0	468	75	156	624
Radio, tv & electronics stores	11,025	20.0	2,205	75	735	2,940
Computers & Software	3,105	20.0	621	75	207	828
Other Shopping Goods						
Sporting goods	$ 5,760	25.0%	$ 1,440	75%	$ 480	$ 1,920
General Line Sporting Gds.	2,475	25.0	619	75	206	825
Specialty Line Sporting Gds.	3,285	25.0	821	75	274	1,095
Book stores & newsdealers	1,845	20.0	369	75	123	492
Stationery Stores and Office Supply	2,745	20.0	549	75	183	732
Musical Instrument & Supplies	1,215	20.0	243	75	81	324
Jewelry stores	3,105	25.0	776	75	259	1,035
Hobby, toy & game	2,250	20.0	450	75	150	600
Camera & photographic supply	1,035	20.0	207	75	69	276
Gift, novelty & souvenirs	2,880	20.0	576	75	192	768
Luggage & leather goods	180	20.0	36	75	12	48
Sewing, needlework & piece goods	1,125	20.0	225	75	75	300
Pet stores	1,665	20.0	333	75	111	444
Art dealers	405	20.0	81	75	27	108
Optical goods stores	1,350	25.0	338	75	113	451
Pre-Recorded Tapes, Compact Discs	815	25.0	204	75	68	272
Cosmetics, beauty supplies & perfume	801	20.0	160	75	53	213
All other health & personal care	1,665	20.0	333	75	111	444

Table D-1 (continued)

DOWNTOWN FARMINGTON TRADE AREA
RETAIL PURCHASING POWER, MARKET SHARE AND SALES POTENTIAL, 2010
BY MERCHANDISE CATEGORY
(In Thousands of Dollars)

Merchandise Category	Resident Purchasing Power	Estimated Market Share	Trade Area Sales	Trade Area Percent	Other Shoppers	Estimated Total Sales
CONVENIENCE GOODS						
Food Stores	$ 64,440	0.0%	$ 0	85%	$ 0	$ 0
Grocery stores	62,775	35.0	21,971	85	3,877	25,848
Supermarkets	61,560	35.0	21,546	85	3,802	25,348
Convenience food	1,215	25.0	304	90	34	338
Specialty food stores	1,485	25.0	371	90	41	412
Meat Markets	495	25.0	124	90	14	138
Fish & Seafood Markets	180	25.0	45	90	5	50
Fruit & Vegetable Markets	315	25.0	79	90	9	88
Other Specialty Food Stores	495	25.0	124	90	14	138
Baked Goods	180	25.0	45	90	5	50
Confectionery and Nut Stores	135	25.0	34	90	4	38
All Other Specialty Food Stores	180	25.0	45	90	5	50
Other Convenience Goods						
Drug & proprietary stores	$ 19,260	45.0%	$ 8,667	90%	$ 963	$ 9,630
Hardware	3,330	35.0	1,166	85	206	1,372
Liquor	8,325	25.0	2,081	85	367	2,448
Florist	1,620	35.0	567	85	100	667
Food/health supplement stores	540	35.0	189	85	33	222
Food Service & Drinking Places	$ 49,815	0.0%	$ 0	75%	$ 0	$ 0
Food Service	47,340	20.0	9,468	75	3,156	12,624
Full-service restaurants	22,320	35.0	7,812	75	2,604	10,416
Limited service restaurants	16,470	65.0	10,706	75	3,569	14,275
Cafeterias	675	0.0	0	75	0	0
Snack & beverage places	2,565	25.0	641	75	214	855
Ice Cream & Soft Serve	405	25.0	101	75	34	135
Frozen Yogurt	45	25.0	11	75	4	15
Doughnut Shops	540	25.0	135	75	45	180
Bagel Shops	270	25.0	68	75	23	91
Coffee Shops	765	25.0	191	75	64	255
Cookie Shops	45	25.0	11	75	4	15
Other Snack Shops	495	25.0	124	75	41	165
Drinking Places	$ 2,475	0.0%	$ 0	75%	$ 0	$ 0
Gasoline Svs Stations/Conv.						
Gas/Convenience food stores	$ 34,290	60.0%	$ 20,574	70%	$ 8,817	$ 29,391
Other Gas Stations & Truck Stops	3,915	60.0	2,349	70	1,007	3,356
OTHER RETAIL STORES						
Building Materials & Garden Supplies	$ 34,965	0.0%	$ 0	85%	$ 0	$ 0
Building materials & supplies stores	30,825	35.0	10,789	85	1,904	12,693
Home centers	13,005	50.0	6,503	85	1,148	7,651
Paint, glass & wallpaper	1,395	35.0	488	85	86	574
Other building materials dealers	16,425	25.0	4,106	85	725	4,831
Lawn & garden equipment						
Outdoor power equipment	855	35.0	299	85	53	352
Retail nurseries, lawn & garden	3,285	35.0	1,150	85	203	1,353
Motor Vehicles & Parts Dealers						
Auto parts, accessories & tires	$ 7,380	20.0%	$ 1,476	75%	$ 492	$ 1,968
Auto parts & accessories stores	4,545	20.0	909	75	303	1,212
Tire dealers	2,835	20.0	567	75	189	756
Auto Dealers	100,395	20.0	20,079	75	6,693	26,772

Source: McComb Group, Ltd.

Table D-1 (continued)

DOWNTOWN FARMINGTON TRADE AREA
RETAIL PURCHASING POWER, MARKET SHARE AND SALES POTENTIAL, 201
BY MERCHANDISE CATEGORY
(In Thousands of Dollars)

Merchandise Category	Resident Purchasing Power	Estimated Market Share	Trade Area Sales	Trade Area Percent	Other Shoppers	Estimated Total Sales
SHOPPING GOODS						
General Merchandise						
Department stores **(Incl. leased depts.)**						
Discount stores	$ 45,536	15.0%	$ 6,830	70%	$ 2,927	$ 9,757
Department Stores	17,170	20.0	3,434	70	1,472	4,906
Other general merchandise stores	5,163	20.0	1,033	75	344	1,377
Warehouse Clubs and Supercenters	4,293	40.0	1,717	70	736	2,453
Variety stores	870	20.0	174	70	75	249
Miscellaneous general mdse.	4,293	20.0	859	70	368	1,227
Apparel & Accessories	$ 24,704	20.0%	$ 4,941	75%	$ 1,647	$ 6,588
Clothing Stores	21,231	20.0	4,246	75	1,415	5,661
Mens and boys	1,044	20.0	209	75	70	279
Womens clothing	5,047	20.0	1,009	75	336	1,345
Children's & infant	1,218	20.0	244	75	81	325
Family clothing	11,950	20.0	2,390	75	797	3,187
Clothing accessories stores	406	20.0	81	75	27	108
Other clothing stores	1,566	20.0	313	75	104	417
Shoe Stores	$ 3,473	20.0	$ 695	75	232	927
Men's	207	20.0	41	75	14	55
Women's	250	20.0	50	75	17	67
Children's & infant	116	20.0	23	75	8	31
Family shoe stores	1,972	20.0	394	75	131	525
Athletic footwear	928	20.0	186	75	62	248
Furniture & Home Furnishings	$ 19,781	20.0%	$ 3,956	75%	$ 1,319	$ 5,275
Furniture	9,919	20.0	1,984	75	661	2,645
Floor coverings	5,047	20.0	1,009	75	336	1,345
Window treatment stores	232	20.0	46	75	15	61
All other home furnishings stores	4,641	20.0	928	75	309	1,237
Electronics & Appliances Stores	$ 21,231	20.0%	$ 4,246	75%	$ 1,415	$ 5,661
Household appliance stores	3,016	20.0	603	75	201	804
Radio, tv & electronics stores	14,212	20.0	2,842	75	947	3,789
Computers & Software	4,003	20.0	801	75	267	1,068
Other Shopping Goods						
Sporting goods	$ 7,425	25.0%	$ 1,856	75%	$ 619	2,475
General Line Sporting Gds.	3,190	25.0	798	75	266	1,064
Specialty Line Sporting Gds.	4,235	25.0	1,059	75	353	1,412
Book stores & newsdealers	2,378	20.0	476	75	159	635
Stationery Stores and Office Supply	3,538	20.0	708	75	236	944
Musical Instrument & Supplies	1,566	20.0	313	75	104	417
Jewelry stores	4,003	25.0	1,001	75	334	1,335
Hobby, toy & game	2,900	20.0	580	75	193	773
Camera & photographic supply	1,334	20.0	267	75	89	356
Gift, novelty & souvenirs	3,713	20.0	743	75	248	991
Luggage & leather goods	232	20.0	46	75	15	61
Sewing, needlework & piece goods	1,450	20.0	290	75	97	387
Pet stores	2,146	20.0	429	75	143	572
Art dealers	522	20.0	104	75	35	139
Optical goods stores	1,740	25.0	435	75	145	580
Pre-Recorded Tapes, Compact Discs	1,051	25.0	263	75	88	351
Cosmetics, beauty supplies & perfume	1,033	20.0	207	75	69	276
All other health & personal care	2,146	20.0	429	75	143	572

Table D-1 (continued)

DOWNTOWN FARMINGTON TRADE AREA
RETAIL PURCHASING POWER, MARKET SHARE AND SALES POTENTIAL, 2015
BY MERCHANDISE CATEGORY
(In Thousands of Dollars)

Merchandise Category	Resident Purchasing Power	Estimated Market Share	Trade Area Sales	Trade Area Percent	Other Shoppers	Estimated Total Sales
CONVENIENCE GOODS						
Food Stores	$ 83,067	0.0%	$ 0	85%	$ 0	$ 0
Grocery stores	80,921	35.0	28,322	85	4,998	33,320
Supermarkets	79,355	35.0	27,774	85	4,901	32,675
Convenience food	1,566	25.0	392	90	44	436
Specialty food stores	1,914	25.0	479	90	53	532
Meat Markets	638	25.0	160	90	18	178
Fish & Seafood Markets	232	25.0	58	90	6	64
Fruit & Vegetable Markets	406	25.0	102	90	11	113
Other Specialty Food Stores	638	25.0	160	90	18	178
Baked Goods	232	25.0	58	90	6	64
Confectionery and Nut Stores	174	25.0	44	90	5	49
All Other Specialty Food Stores	232	25.0	58	90	6	64
Other Convenience Goods						
Drug & proprietary stores	$ 24,827	45.0%	$ 11,172	90%	$ 1,241	$ 12,413
Hardware	4,293	35.0	1,503	85	265	1,768
Liquor	10,731	25.0	2,683	85	473	3,156
Florist	2,088	35.0	731	85	129	860
Food/health supplement stores	696	35.0	244	85	43	287
Food Service & Drinking Places	$ 64,214	0.0%	$ 0	75%	$ 0	$ 0
Food Service	61,024	20.0	12,205	75	4,068	16,273
Full-service restaurants	28,772	35.0	10,070	75	3,357	13,427
Limited service restaurants	21,231	65.0	13,800	75	4,600	18,400
Cafeterias	870	0.0	0	75	0	0
Snack & beverage places	3,306	25.0	827	75	276	1,103
Ice Cream & Soft Serve	522	25.0	131	75	44	175
Frozen Yogurt	58	25.0	15	75	5	20
Doughnut Shops	696	25.0	174	75	58	232
Bagel Shops	348	25.0	87	75	29	116
Coffee Shops	986	25.0	247	75	82	329
Cookie Shops	58	25.0	15	75	5	20
Other Snack Shops	638	25.0	160	75	53	213
Drinking Places	$ 3,190	0.0%	$ 0	75%	$ 0	$ 0
Gasoline Svs Stations/Conv.						
Gas/Convenience food stores	$ 44,202	60.0%	$ 26,521	70%	$ 11,366	$ 37,887
Other Gas Stations & Truck Stops	5,047	60.0	3,028	70	1,298	4,326
OTHER RETAIL STORES						
Building Materials & Garden Supplies	$ 45,072	0.0%	$ 0	85%	$ 0	$ 0
Building materials & supplies stores	39,735	35.0	13,907	85	2,454	16,361
Home centers	16,764	50.0	8,382	85	1,479	9,861
Paint, glass & wallpaper	1,798	35.0	629	85	111	740
Other building materials dealers	21,173	25.0	5,293	85	934	6,227
Lawn & garden equipment						
Outdoor power equipment	1,102	35.0	386	85	68	454
Retail nurseries, lawn & garden	4,235	35.0	1,482	85	262	1,744
Motor Vehicles & Parts Dealers						
Auto parts, accessories & tires	$ 9,513	20.0%	$ 1,903	75%	$ 634	$ 2,537
Auto parts & accessories stores	5,859	20.0	1,172	75	391	1,563
Tire dealers	3,654	20.0	731	75	244	975
Auto Dealers	129,416	20.0	25,883	75	8,628	34,511

Source: McComb Group, Ltd.

Table D-1 (continued)

DOWNTOWN FARMINGTON TRADE AREA
RETAIL PURCHASING POWER, MARKET SHARE AND SALES POTENTIAL, 2020
BY MERCHANDISE CATEGORY
(In Thousands of Dollars)

Merchandise Category	Resident Purchasing Power	Estimated Market Share	Trade Area Sales	Trade Area Percent	Other Shoppers	Estimated Total Sales
SHOPPING GOODS						
General Merchandise						
Department stores (Incl. leased depts.)						
Discount stores	$ 57,323	15.0%	$ 8,598	70%	$ 3,685	$ 12,283
Department Stores	21,615	20.0	4,323	70	1,853	6,176
Other general merchandise stores	6,499	20.0	1,300	75	433	1,733
Warehouse Clubs and Supercenters	5,404	40.0	2,162	70	927	3,089
Variety stores	1,095	20.0	219	70	94	313
Miscellaneous general mdse.	5,404	20.0	1,081	70	463	1,544
Apparel & Accessories	$ 31,098	20.0%	$ 6,220	75%	$ 2,073	$ 8,293
Clothing Stores	26,726	20.0	5,345	75	1,782	7,127
Mens and boys	1,314	20.0	263	75	88	351
Womens clothing	6,353	20.0	1,271	75	424	1,695
Children's & infant	1,533	20.0	307	75	102	409
Family clothing	15,043	20.0	3,009	75	1,003	4,012
Clothing accessories stores	511	20.0	102	75	34	136
Other clothing stores	1,972	20.0	394	75	131	525
Shoe Stores	$ 4,372	20.0	$ 874	75	291	1,165
Men's	260	20.0	52	75	17	69
Women's	315	20.0	63	75	21	84
Children's & infant	146	20.0	29	75	10	39
Family shoe stores	2,483	20.0	497	75	166	663
Athletic footwear	1,168	20.0	234	75	78	312
Furniture & Home Furnishings	$ 24,901	20.0%	$ 4,980	75%	$ 1,660	$ 6,640
Furniture	12,487	20.0	2,497	75	832	3,329
Floor coverings	6,353	20.0	1,271	75	424	1,695
Window treatment stores	292	20.0	58	75	19	77
All other home furnishings stores	5,842	20.0	1,168	75	389	1,557
Electronics & Appliances Stores	$ 26,727	20.0%	$ 5,345	75%	$ 1,782	$ 7,127
Household appliance stores	3,797	20.0	759	75	253	1,012
Radio, tv & electronics stores	17,891	20.0	3,578	75	1,193	4,771
Computers and Software	5,039	20.0	1,008	75	336	1,344
Other Shopping Goods						
Sporting goods	$ 9,347	25.0%	$ 2,337	75%	$ 779	$ 3,116
General Line Sporting Gds.	4,016	25.0	1,004	75	335	1,339
Specialty Line Sporting Gds.	5,331	25.0	1,333	75	444	1,777
Book stores & newsdealers	2,994	20.0	599	75	200	799
Stationery Stores and Office Supply	4,454	20.0	891	75	297	1,188
Musical Instrument & Supplies	1,972	20.0	394	75	131	525
Jewelry stores	5,039	25.0	1,260	75	420	1,680
Hobby, toy & game	3,651	20.0	730	75	243	973
Camera & photographic supply	1,680	20.0	336	75	112	448
Gift, novelty & souvenirs	4,673	20.0	935	75	312	1,247
Luggage & leather goods	292	20.0	58	75	19	77
Sewing, needlework & piece goods	1,826	20.0	365	75	122	487
Pet stores	2,702	20.0	540	75	180	720
Art dealers	657	20.0	131	75	44	175
Optical goods stores	2,191	25.0	548	75	183	731
Pre-Recorded Tapes, Compact Discs	1,322	25.0	331	75	110	441
Cosmetics, beauty supplies & perfume	1,301	20.0	260	75	87	347
All other health & personal care	2,702	20.0	540	75	180	720

Table D-1 (continued)

DOWNTOWN FARMINGTON TRADE AREA
RETAIL PURCHASING POWER, MARKET SHARE AND SALES POTENTIAL, 2020
BY MERCHANDISE CATEGORY
(In Thousands of Dollars)

Merchandise Category	Resident Purchasing Power	Estimated Market Share	Trade Area Sales	Trade Area Percent	Other Shoppers	Estimated Total Sales
CONVENIENCE GOODS						
Food Stores	$ 104,570	0.0%	$ 0	85%	$ 0	$ 0
Grocery stores	101,868	35.0	35,654	85	6,292	41,946
Supermarkets	99,896	35.0	34,964	85	6,170	41,134
Convenience food	1,972	25.0	493	90	55	548
Specialty food stores	2,410	25.0	603	90	67	670
Meat Markets	803	25.0	201	90	22	223
Fish & Seafood Markets	292	25.0	73	90	8	81
Fruit & Vegetable Markets	511	25.0	128	90	14	142
Other Specialty Food Stores	803	25.0	201	90	22	223
Baked Goods	292	25.0	73	90	8	81
Confectionery and Nut Stores	219	25.0	55	90	6	61
All Other Specialty Food Stores	292	25.0	73	90	8	81
Other Convenience Goods						
Drug & proprietary stores	$ 31,254	45.0%	$ 14,064	90%	$ 1,563	$ 15,627
Hardware	5,404	35.0	1,891	85	334	2,225
Liquor	13,509	25.0	3,377	85	596	3,973
Florist	2,629	35.0	920	85	162	1,082
Food/health supplement stores	876	35.0	307	85	54	361
Food Service & Drinking Places	$ 80,836	0.0%	$ 0	75%	$ 0	$ 0
Food Service	76,820	20.0	15,364	75	5,121	20,485
Full-service restaurants	36,220	35.0	12,677	75	4,226	16,903
Limited service restaurants	26,727	65.0	17,373	75	5,791	23,164
Cafeterias	1,095	0.0	0	75	0	0
Snack & beverage places	4,161	25.0	1,040	75	347	1,387
Ice Cream & Soft Serve	657	25.0	164	75	55	219
Frozen Yogurt	73	25.0	18	75	6	24
Doughnut Shops	876	25.0	219	75	73	292
Bagel Shops	438	25.0	110	75	37	147
Coffee Shops	1,241	25.0	310	75	103	413
Cookie Shops	73	25.0	18	75	6	24
Other Snack Shops	803	25.0	201	75	67	268
Drinking Places	$ 4,016	0.0%	$ 0	75%	$ 0	$ 0
Gasoline Svs Stations/Conv.						
Gas/Convenience food stores	$ 55,644	60.0%	$ 33,386	70%	$ 14,308	$ 47,694
Other Gas Stations & Truck Stops	6,353	60.0	3,812	70	1,634	5,446
OTHER RETAIL STORES						
Building Materials & Garden Supplies	$ 56,740	0.0%	$ 0	85%	$ 0	$ 0
Building materials & supplies stores	50,022	35.0	17,508	85	3,090	20,598
Home centers	21,104	50.0	10,552	85	1,862	12,414
Paint, glass & wallpaper	2,264	35.0	792	85	140	932
Other building materials dealers	26,654	25.0	6,664	85	1,176	7,840
Lawn & garden equipment						
Outdoor power equipment	1,387	35.0	485	85	86	571
Retail nurseries, lawn & garden	5,331	35.0	1,866	85	329	2,195
Motor Vehicles & Parts Dealers						
Auto parts, accessories & tires	$ 11,975	20.0%	$ 2,395	75%	$ 798	$ 3,193
Auto parts & accessories stores	7,375	20.0	1,475	75	492	1,967
Tire dealers	4,600	20.0	920	75	307	1,227
Auto Dealers	162,915	20.0	32,583	75	10,861	43,444

Source: McComb Group, Ltd.

Table D-1 (continued)

DOWNTOWN FARMINGTON TRADE AREA
RETAIL PURCHASING POWER, MARKET SHARE AND SALES POTENTIAL, 202
BY MERCHANDISE CATEGORY
(In Thousands of Dollars)

Merchandise Category	Resident Purchasing Power	Estimated Market Share	Trade Area Sales	Trade Area Percent	Other Shoppers	Estimated Total Sales
SHOPPING GOODS						
General Merchandise						
Department stores **(Incl. leased depts.)**						
Discount stores	$ 70,968	15.0%	$ 10,645	70%	$ 4,562	$ 15,207
Department Stores	26,760	20.0	5,352	70	2,294	7,646
Other general merchandise stores	8,046	20.0	1,609	75	536	2,145
Warehouse Clubs	6,690	40.0	2,676	70	1,147	3,823
Variety stores	1,356	20.0	271	70	116	387
Miscellaneous general mdse.	6,690	20.0	1,338	70	573	1,911
Apparel & Accessories	$ 38,502	20.0%	$ 7,700	75%	$ 2,567	$ 10,267
Clothing Stores	33,089	20.0	6,618	75	2,206	8,824
Mens and boys	1,627	20.0	325	75	108	433
Womens clothing	7,865	20.0	1,573	75	524	2,097
Children's & infant	1,899	20.0	380	75	127	507
Family clothing	18,624	20.0	3,725	75	1,242	4,967
Clothing accessories stores	633	20.0	127	75	42	169
Other clothing stores	2,441	20.0	488	75	163	651
Shoe Stores	$ 5,413	20.0	$ 1,083	75	361	1,444
Men's	322	20.0	64	75	21	85
Women's	390	20.0	78	75	26	104
Children's & infant	181	20.0	36	75	12	48
Family shoe stores	3,074	20.0	615	75	205	820
Athletic footwear	1,446	20.0	289	75	96	385
Furniture & Home Furnishings	$ 30,828	20.0%	$ 6,166	75%	$ 2,055	$ 8,221
Furniture	15,459	20.0	3,092	75	1,031	4,123
Floor coverings	7,865	20.0	1,573	75	524	2,097
Window treatment stores	362	20.0	72	75	24	96
All other home furnishings stores	7,232	20.0	1,446	75	482	1,928
Electronics & Appliances Stores	$ 33,088	20.0%	$ 6,618	75%	$ 2,206	$ 8,824
Household appliance stores	4,701	20.0	940	75	313	1,253
Radio, tv & electronics stores	22,149	20.0	4,430	75	1,477	5,907
Computers and Software	6,238	20.0	1,248	75	416	1,664
Other Shopping Goods						
Sporting goods	$ 11,572	25.0%	$ 2,893	75%	$ 964	$ 3,857
General Line Sporting Gds.	4,972	25.0	1,243	75	414	1,657
Specialty Line Sporting Gds.	6,600	25.0	1,650	75	550	2,200
Book stores & newsdealers	3,707	20.0	741	75	247	988
Stationery Stores and Office Supply	5,515	20.0	1,103	75	368	1,471
Musical Instrument & Supplies	2,441	20.0	488	75	163	651
Jewelry stores	6,238	25.0	1,560	75	520	2,080
Hobby, toy & game	4,520	20.0	904	75	301	1,205
Camera & photographic supply	2,079	20.0	416	75	139	555
Gift, novelty & souvenirs	5,786	20.0	1,157	75	386	1,543
Luggage & leather goods	362	20.0	72	75	24	96
Sewing, needlework & piece goods	2,260	20.0	452	75	151	603
Pet stores	3,345	20.0	669	75	223	892
Art dealers	814	20.0	163	75	54	217
Optical goods stores	2,712	25.0	678	75	226	904
Pre-Recorded Tapes, Compact Discs	1,637	25.0	409	75	136	545
Cosmetics, beauty supplies & perfume	1,610	20.0	322	75	107	429
All other health & personal care	3,345	20.0	669	75	223	892

Table D-1 (continued)

DOWNTOWN FARMINGTON TRADE AREA
RETAIL PURCHASING POWER, MARKET SHARE AND SALES POTENTIAL, 2025
BY MERCHANDISE CATEGORY
(In Thousands of Dollars)

Merchandise Category	Resident Purchasing Power	Estimated Market Share	Trade Area Sales	Trade Area Percent	Other Shoppers	Estimated Total Sales
CONVENIENCE GOODS						
Food Stores	$ 129,461	0.0%	$ 0	85%	$ 0	$ 0
Grocery stores	126,116	35.0	44,141	85	7,790	51,931
Supermarkets	123,675	35.0	43,286	85	7,639	50,925
Convenience food	2,441	25.0	610	90	68	678
Specialty food stores	2,983	25.0	746	90	83	829
Meat Markets	994	25.0	249	90	28	277
Fish & Seafood Markets	362	25.0	91	90	10	101
Fruit & Vegetable Markets	633	25.0	158	90	18	176
Other Specialty Food Stores	994	25.0	249	90	28	277
Baked Goods	362	25.0	91	90	10	101
Confectionery and Nut Stores	271	25.0	68	90	8	76
All Other Specialty Food Stores	362	25.0	91	90	10	101
Other Convenience Goods						
Drug & proprietary stores	$ 38,694	45.0%	$ 17,412	90%	$ 1,935	$ 19,347
Hardware	6,690	35.0	2,342	85	413	2,755
Liquor	16,725	25.0	4,181	85	738	4,919
Florist	3,255	35.0	1,139	85	201	1,340
Food/health supplement stores	1,085	35.0	380	85	67	447
Food Service & Drinking Places	$ 100,077	0.0%	$ 0	75%	$ 0	$ 0
Food Service	95,105	20.0	19,021	75	6,340	25,361
Full-service restaurants	44,841	35.0	15,694	75	5,231	20,925
Limited service restaurants	33,088	65.0	21,507	75	7,169	28,676
Cafeterias	1,356	0.0	0	75	0	0
Snack & beverage places	5,152	25.0	1,288	75	429	1,717
Ice Cream & Soft Serve	814	25.0	204	75	68	272
Frozen Yogurt	90	25.0	23	75	8	31
Doughnut Shops	1,085	25.0	271	75	90	361
Bagel Shops	542	25.0	136	75	45	181
Coffee Shops	1,537	25.0	384	75	128	512
Cookie Shops	90	25.0	23	75	8	31
Other Snack Shops	994	25.0	249	75	83	332
Drinking Places	$ 4,972	0.0%	$ 0	75%	$ 0	$ 0
Gasoline Svs Stations/Conv.						
Gas/Convenience food stores	$ 68,889	60.0%	$ 413	70%	$ 58,587	$ 59,000
Other Gas Stations & Truck Stops	7,865	60.0	4,719	70	2,022	6,741
OTHER RETAIL STORES						
Building Materials & Garden Supplies	$ 70,246	0.0%	$ 0	85%	$ 0	$ 0
Building materials & supplies stores	61,928	35.0	21,675	85	3,825	25,500
Home centers	26,127	50.0	13,064	85	2,305	15,369
Paint, glass & wallpaper	2,803	35.0	981	85	173	1,154
Other building materials dealers	32,998	25.0	8,250	85	1,456	9,706
Lawn & garden equipment						
Outdoor power equipment	1,718	35.0	601	85	106	707
Retail nurseries, lawn & garden	6,600	35.0	2,310	85	408	2,718
Motor Vehicles & Parts Dealers						
Auto parts, accessories & tires	$ 14,827	20.0%	$ 2,965	75%	$ 988	$ 3,953
Auto parts & accessories stores	9,131	20.0	1,826	75	609	2,435
Tire dealers	5,696	20.0	1,139	75	380	1,519
Auto Dealers	201,695	20.0	40,339	75	13,446	53,785

Source: McComb Group, Ltd.

TableD-1 (continued)

DOWNTOWN FARMINGTON TRADE AREA
RETAIL PURCHASING POWER, MARKET SHARE AND SALES POTENTIAL, 203
BY MERCHANDISE CATEGORY
(In Thousands of Dollars)

Merchandise Category	Resident Purchasing Power	Estimated Market Share	Trade Area Sales	Trade Area Percent	Other Shoppers	Estimated Total Sales
SHOPPING GOODS						
General Merchandise						
Department stores (Incl. leased depts.)						
Discount stores	$ 86,616	15.0%	$ 12,992	70%	$ 5,568	$ 18,560
Department Stores	32,660	20.0	6,532	70	2,799	9,331
Other general merchandise stores	9,820	20.0	1,964	75	655	2,619
Warehouse Clubs	8,165	40.0	3,266	70	1,400	4,666
Variety stores	1,655	20.0	331	70	142	473
Miscellaneous general mdse.	8,165	20.0	1,633	70	700	2,333
Apparel & Accessories	$ 46,990	20.0%	$ 9,398	75%	$ 3,133	$ 12,531
Clothing Stores	40,383	20.0	8,077	75	2,692	10,769
Mens and boys	1,986	20.0	397	75	132	529
Womens clothing	9,599	20.0	1,920	75	640	2,560
Children's & infant	2,317	20.0	463	75	154	617
Family clothing	22,730	20.0	4,546	75	1,515	6,061
Clothing accessories stores	772	20.0	154	75	51	205
Other clothing stores	2,979	20.0	596	75	199	795
Shoe Stores	$ 6,607	20.0	$ 1,321	75	440	1,761
Men's	393	20.0	79	75	26	105
Women's	476	20.0	95	75	32	127
Children's & infant	221	20.0	44	75	15	59
Family shoe stores	3,752	20.0	750	75	250	1,000
Athletic footwear	1,765	20.0	353	75	118	471
Furniture & Home Furnishings	$ 37,625	20.0%	$ 7,525	75%	$ 2,508	$ 10,033
Furniture	18,868	20.0	3,774	75	1,258	5,032
Floor coverings	9,599	20.0	1,920	75	640	2,560
Window treatment stores	441	20.0	88	75	29	117
All other home furnishings stores	8,827	20.0	1,765	75	588	2,353
Electronics & Appliances Stores	$ 40,384	20.0%	$ 8,077	75%	$ 2,692	$ 10,769
Household appliance stores	5,738	20.0	1,148	75	383	1,531
Radio, tv & electronics stores	27,033	20.0	5,407	75	1,802	7,209
Computers and Software	7,613	20.0	1,523	75	508	2,031
Other Shopping Goods						
Sporting goods	$ 14,124	25.0%	$ 3,531	75%	$ 1,177	$ 4,708
General Line Sporting Gds.	6,069	25.0	1,517	75	506	2,023
Specialty Line Sporting Gds.	8,055	25.0	2,014	75	671	2,685
Book stores & newsdealers	4,524	20.0	905	75	302	1,207
Stationery Stores and Office Supply	6,731	20.0	1,346	75	449	1,795
Musical Instrument & Supplies	2,979	20.0	596	75	199	795
Jewelry stores	7,613	25.0	1,903	75	634	2,537
Hobby, toy & game	5,517	20.0	1,103	75	368	1,471
Camera & photographic supply	2,538	20.0	508	75	169	677
Gift, novelty & souvenirs	7,062	20.0	1,412	75	471	1,883
Luggage & leather goods	441	20.0	88	75	29	117
Sewing, needlework & piece goods	2,758	20.0	552	75	184	736
Pet stores	4,083	20.0	817	75	272	1,089
Art dealers	993	20.0	199	75	66	265
Optical goods stores	3,310	25.0	828	75	276	1,104
Pre-Recorded Tapes, Compact Discs	1,998	25.0	500	75	167	667
Cosmetics, beauty supplies & perfume	1,965	20.0	393	75	131	524
All other health & personal care	4,082	20.0	816	75	272	1,088

Table D-1 (continued)

DOWNTOWN FARMINGTON TRADE AREA
RETAIL PURCHASING POWER, MARKET SHARE AND SALES POTENTIAL, 2030
BY MERCHANDISE CATEGORY
(In Thousands of Dollars)

Merchandise Category	Resident Purchasing Power	Estimated Market Share	Trade Area Sales	Trade Area Percent	Other Shoppers	Estimated Total Sales
CONVENIENCE GOODS						
Food Stores	$ 158,004	0.0%	$ 0	85%	$ 0	$ 0
Grocery stores	153,922	35.0	53,873	85	9,507	63,380
Supermarkets	150,943	35.0	52,830	85	9,323	62,153
Convenience food	2,979	25.0	745	90	83	828
Specialty food stores	3,641	25.0	910	90	101	1,011
Meat Markets	1,214	25.0	304	90	34	338
Fish & Seafood Markets	441	25.0	110	90	12	122
Fruit & Vegetable Markets	772	25.0	193	90	21	214
Other Specialty Food Stores	1,214	25.0	304	90	34	338
Baked Goods	441	25.0	110	90	12	122
Confectionery and Nut Stores	331	25.0	83	90	9	92
All Other Specialty Food Stores	441	25.0	110	90	12	122
Other Convenience Goods						
Drug & proprietary stores	$ 47,225	45.0%	$ 21,251	90%	$ 2,361	$ 23,612
Hardware	8,165	35.0	2,858	85	504	3,362
Liquor	20,413	25.0	5,103	85	901	6,004
Florist	3,972	35.0	1,390	85	245	1,635
Food/health supplement stores	1,324	35.0	463	85	82	545
Food Service & Drinking Places	$ 122,145	0.0%	$ 0	75%	$ 0	$ 0
Food Service	116,076	20.0	23,215	75	7,738	30,953
Full-service restaurants	54,728	35.0	19,155	75	6,385	25,540
Limited service restaurants	40,384	65.0	26,250	75	8,750	35,000
Cafeterias	1,655	0.0	0	75	0	0
Snack & beverage places	6,289	25.0	1,572	75	524	2,096
Ice Cream & Soft Serve	993	25.0	248	75	83	331
Frozen Yogurt	110	25.0	28	75	9	37
Doughnut Shops	1,324	25.0	331	75	110	441
Bagel Shops	662	25.0	166	75	55	221
Coffee Shops	1,876	25.0	469	75	156	625
Cookie Shops	110	25.0	28	75	9	37
Other Snack Shops	1,214	25.0	304	75	101	405
Drinking Places	$ 6,069	0.0%	$ 0	75%	$ 0	$ 0
Gasoline Svs Stations/Conv.						
Gas/Convenience food stores	$ 84,078	60.0%	$ 50,447	70%	$ 21,620	72,067
Other Gas Stations & Truck Stops	9,599	60.0	5,759	70	2,468	8,227
OTHER RETAIL STORES						
Building Materials & Garden Supplies						
Building materials & supplies stores	$ 75,583	35.0%	$ 26,454	85%	$ 4,668	$ 31,122
Home centers	31,888	50.0	15,944	85	2,814	18,758
Paint, glass & wallpaper	3,421	35.0	1,197	85	211	1,408
Other building materials dealers	40,274	25.0	10,069	85	1,777	11,846
Lawn & garden equipment						
Outdoor power equipment	2,096	35.0	734	85	130	864
Retail nurseries, lawn & garden	8,055	35.0	2,819	85	497	3,316
Motor Vehicles & Parts Dealers						
Auto parts, accessories & tires	$ 18,095	20.0%	$ 3,619	75%	$ 1,206	$ 4,825
Auto parts & accessories stores	11,144	20.0	2,229	75	743	2,972
Tire dealers	6,951	20.0	1,390	75	463	1,853
Auto Dealers	246,166	20.0	49,233	75	16,411	65,644

Source: McComb Group, Ltd.

Table D-2

DOWNTOWN FARMINGTON TRADE AREA
SERVICES PURCHASING POWER, MARKET SHARE AND SALES POTENTIAL, 2010
BY SERVICES CATEGORY
(In Thousands of Dollars)

Category	Resident Purchasing Power	Estimated Market Share	Trade Area Sales	Trade Area Percent	Other Shoppers	Estimated Total Sales
Personal Care Services						
Barber shops	$ 127	25.0%	$ 32	85%	$ 6	$ 38
Beauty shops	4,054	25.0	1,014	85	179	1,193
Nail salons	235	25.0	59	85	10	69
Diet & weight reducing services	362	25.0	91	85	16	107
Other personal care services	416	25.0	104	85	18	122
Drycleaning and Laundry Services						
Coin-operated laundries & drycleaners	$ 507	25.0%	$ 127	85%	$ 22	$ 149
Drycleaning & laundry services (except coin-op.)	1,122	25.0	281	85	50	331
Other Personal Services						
Photofinishing	$ 1,032	25.0%	$ 258	85%	$ 46	$ 304
Photofinishing Laboratories	832	25.0	208	85	37	245
One Hour Photo Finishing	199	25.0	50	85	9	59
Child Day Care Services	3,873	25.0	968	85	171	1,139
Funeral Homes & Funeral Services	1,086	25.0	272	85	48	320
Photographic Services	3,800	25.0	950	85	168	1,118
Photographic Studios	1,212	25.0	303	85	53	356
Veteranarian Services	2,425	25.0	606	85	107	713
Pet Care	362	25.0	91	85	16	107
Rental and Leasing						
Formalwear and costume rental	$ 145	25.0%	36	85%	$ 6	$ 42
Video tape and disc rental	1,321	25.0	330	85	58	388
Recreation						
Bowling centers	$ 832	25.0%	208	85%	$ 37	$ 245
Physical fitness facilites	4,054	25.0	1,014	85	179	1,193
Golf courses and country clubs	2,932	25.0	733	85	129	862
Professional Services						
Offices of real estate agents & brokers	$ 13,265	25.0%	$ 3,316	85%	$ 585	$ 3,901
Offices of real estate appraisers	1,719	25.0	430	85	76	506
Household Goods Repair						
Home & Garden Equipment & Appliance Repair	$ 416	25.0%	$ 104	85%	$ 18	$ 122
Reupholstery & furniture repair	290	25.0	73	85	13	86
Footwear and leather goods repair	36	25.0	9	85	2	11
Watch, clock and jewelry repair	72	25.0	18	85	3	21
Garment repair and alteration services	54	25.0	14	85	2	16
Automotive Repair and Maintenance						
General automotive repair	$ 6,243	25.0%	$ 1,561	85%	$ 275	$ 1,836
Automotive exhaust system repair	163	25.0	41	85	7	48
Automotive transmission repair	398	25.0	100	85	18	118
Carburetor repair shops	434	25.0	109	85	19	128
Brake, front end & wheel alignment	308	25.0	77	85	14	91
Electrical repair shops, motor vehicle	54	25.0	14	85	2	16
Paint or body repair shops	4,434	25.0	1,109	85	196	1,305
Automotive glass replacement	1,357	25.0	339	85	60	399
Automotive oil change & lubrication shops	651	25.0	163	85	29	192
Carwashes	814	25.0	204	85	36	240

Table D-2 (continued)

DOWNTOWN FARMINGTON TRADE AREA
SERVICES PURCHASING POWER, MARKET SHARE AND SALES POTENTIAL, 2010
BY SERVICES CATEGORY
(In Thousands of Dollars)

Category	Resident Purchasing Power	Estimated Market Share	Trade Area Sales	Trade Area Percent	Other Shoppers	Estimated Total Sales
Health Care						
Offices of physicians						
Offices of physicians (except mental health specialist	$ 22,096	20.0%	$ 4,419	85%	$ 780	$ 5,199
Offices of physicians, mental health specialists	507	20.0	101	85	18	119
Offices of dentists	8,324	20.0	1,665	85	294	1,959
Offices of other health practitioners						
Offices of chiropractors	1,683	20.0	337	85	59	396
Offices of optometrists	597	20.0	119	85	21	140
Offices of mental health practitioners (except physicians)	471	20.0	94	85	17	111
Offices of physical, occup, & speech therapists & audiologists						
Speech therapist & audiologists	90	20.0	18	85	3	21
Physical & occupational therapists	1,339	20.0	268	85	47	315
Offices of all other health practitioners						
Offices of podiatrists	145	20.0	29	85	5	34
Offices of all other misc. health practitioners	814	20.0	163	85	29	192
Outpatient care centers						
Outpatient mental health & substance abuse centers	1,556	10.0	156	85	28	184
Other outpatient care centers						
Kidney dialysis centers	633	10.0	63	85	11	74
All other outpatient care centers	923	10.0	92	85	16	108
Home health care services	2,823	10.0	282	85	50	332

Source: McComb Group, Ltd.

Table D-2 (continued)

DOWNTOWN FARMINGTON TRADE AREA
SERVICES PURCHASING POWER, MARKET SHARE AND SALES POTENTIAL, 2015
BY SERVICES CATEGORY
(In Thousands of Dollars)

Category	Resident Purchasing Power	Estimated Market Share	Trade Area Sales	Trade Area Percent	Other Shoppers	Estimated Total Sales
Personal Care Services						
Barber shops	$ 171	25.0%	$ 43	85%	$ 8	$ 51
Beauty shops	5,481	25.0	1,370	85	242	1,612
Nail salons	318	25.0	80	85	14	94
Diet & weight reducing services	489	25.0	122	85	22	144
Other personal care services	563	25.0	141	85	25	166
Drycleaning and Laundry Services						
Coin-operated laundries & drycleaners	$ 685	25.0%	$ 171	85%	$ 30	$ 201
Drycleaning & laundry services (except coin-op.)	1,517	25.0	379	85	67	446
Other Personal Services						
Photofinishing	$ 1,395	25.0%	$ 349	85%	$ 62	$ 411
Photofinishing Laboratories	1,126	25.0	282	85	50	332
One Hour Photo Finishing	269	25.0	67	85	12	79
Child Day Care Services	5,237	25.0	1,309	85	231	1,540
Funeral Homes & Funeral Services	1,468	25.0	367	85	65	432
Photographic Services	5,139	25.0	1,285	85	227	1,512
Photographic Studios	1,640	25.0	410	85	72	482
Veteranarian Services	3,279	25.0	820	85	145	965
Pet Care	489	25.0	122	85	22	144
Rental and Leasing						
Formalwear and costume rental	$ 196	25.0%	49	85%	$ 9	$ 58
Video tape and disc rental	1,786	25.0	447	85	79	526
Recreation						
Bowling centers	$ 1,126	25.0%	282	85%	$ 50	$ 332
Physical fitness facilites	5,481	25.0	1,370	85	242	1,612
Golf courses and country clubs	3,964	25.0	991	85	175	1,166
Professional Services						
Offices of real estate agents & brokers	$ 17,937	25.0%	$ 4,484	85%	$ 791	$ 5,275
Offices of real estate appraisers	2,325	25.0	581	85	103	684
Household Goods Repair						
Home & Garden Equipment & Appliance Repair	$ 563	25.0%	$ 141	85%	$ 25	$ 166
Reupholstery & furniture repair	392	25.0	98	85	17	115
Footwear and leather goods repair	49	25.0	12	85	2	14
Watch, clock and jewelry repair	98	25.0	25	85	4	29
Garment repair and alteration services	73	25.0	18	85	3	21
Automotive Repair and Maintenance						
General automotive repair	$ 8,442	25.0%	$ 2,111	85%	$ 373	$ 2,484
Automotive exhaust system repair	220	25.0	55	85	10	65
Automotive transmission repair	538	25.0	135	85	24	159
Carburetor repair shops	587	25.0	147	85	26	173
Brake, front end & wheel alignment	416	25.0	104	85	18	122
Electrical repair shops, motor vehicle	73	25.0	18	85	3	21
Paint or body repair shops	5,995	25.0	1,499	85	265	1,764
Automotive glass replacement	1,835	25.0	459	85	81	540
Automotive oil change & lubrication shops	881	25.0	220	85	39	259
Carwashes	1,101	25.0	275	85	49	324

Table D-2 (continued)

DOWNTOWN FARMINGTON TRADE AREA
SERVICES PURCHASING POWER, MARKET SHARE AND SALES POTENTIAL, 2015
BY SERVICES CATEGORY
(In Thousands of Dollars)

Category	Resident Purchasing Power	Estimated Market Share	Trade Area Sales	Trade Area Percent	Other Shoppers	Estimated Total Sales
Health Care						
Offices of physicians						
Offices of physicians (except mental health specialist	$ 29,879	20.0%	$ 5,976	85%	$ 1,055	$ 7,031
Offices of physicians, mental health specialists	685	20.0	137	85	24	161
Offices of dentists	11,257	20.0	2,251	85	397	2,648
Offices of other health practitioners						
Offices of chiropractors	2,276	20.0	455	85	80	535
Offices of optometrists	808	20.0	162	85	29	191
Offices of mental health practitioners (except physicians)	636	20.0	127	85	22	149
Offices of physical, occup, & speech therapists & audiologists						
Speech therapist & audiologists	122	20.0	24	85	4	28
Physical & occupational therapists	1,811	20.0	362	85	64	426
Offices of all other health practitioners						
Offices of podiatrists	196	20.0	39	85	7	46
Offices of all other misc. health practitioners	1,101	20.0	220	85	39	259
Outpatient care centers						
Outpatient mental health & substance abuse centers	2,105	10.0	211	85	37	248
Other outpatient care centers						
Kidney dialysis centers	856	10.0	86	85	15	101
All other outpatient care centers	1,248	10.0	125	85	22	147
Home health care services	3,817	10.0	382	85	67	449

Source: McComb Group, Ltd.

Table D-2 (continued)

DOWNTOWN FARMINGTON TRADE AREA
SERVICES PURCHASING POWER, MARKET SHARE AND SALES POTENTIAL, 2020
BY SERVICES CATEGORY
(In Thousands of Dollars)

Category	Resident Purchasing Power	Estimated Market Share	Trade Area Sales	Trade Area Percent	Other Shoppers	Estimated Total Sales
Personal Care Services						
Barber shops	$ 233	25.0%	$ 58	85%	$ 10	$ 68
Beauty shops	7,462	25.0	1,866	85	329	2,195
Nail salons	433	25.0	108	85	19	127
Diet & weight reducing services	666	25.0	167	85	29	196
Other personal care services	766	25.0	192	85	34	226
Drycleaning and Laundry Services						
Coin-operated laundries & drycleaners	$ 933	25.0%	$ 233	85%	$ 41	$ 274
Drycleaning & laundry services (except coin-op.)	2,065	25.0	516	85	91	607
Other Personal Services						
Photofinishing	$ 1,899	25.0%	$ 475	85%	$ 84	$ 559
Photofinishing Laboratories	1,532	25.0	383	85	68	451
One Hour Photo Finishing	366	25.0	92	85	16	108
Child Day Care Services	7,129	25.0	1,782	85	314	2,096
Funeral Homes & Funeral Services	1,999	25.0	500	85	88	588
Photographic Services	6,995	25.0	1,749	85	309	2,058
Photographic Studios	2,232	25.0	558	85	98	656
Veteranarian Services	4,464	25.0	1,116	85	197	1,313
Pet Care	666	25.0	167	85	29	196
Rental and Leasing						
Formalwear and costume rental	$ 266	25.0%	67	85%	$ 12	$ 79
Video tape and disc rental	2,432	25.0	608	85	107	715
Recreation						
Bowling centers	$ 1,532	25.0%	383	85%	$ 68	$ 451
Physical fitness facilites	7,462	25.0	1,866	85	329	2,195
Golf courses and country clubs	5,396	25.0	1,349	85	238	1,587
Professional Services						
Offices of real estate agents & brokers	$ 24,417	25.0%	$ 6,104	85%	$ 1,077	$ 7,181
Offices of real estate appraisers	3,165	25.0	791	85	140	931
Household Goods Repair						
Home & Garden Equipment & Appliance Repair	$ 766	25.0%	$ 192	85%	$ 34	$ 226
Reupholstery & furniture repair	533	25.0	133	85	23	156
Footwear & leather goods repair	67	25.0	17	85	3	20
Watch, clock & jewelry repair	133	25.0	33	85	6	39
Garment repair & alteration services	100	25.0	25	85	4	29
Automotive Repair and Maintenance						
General automotive repair	$ 11,492	25.0%	$ 2,873	85%	$ 507	$ 3,380
Automotive exhaust system repair	300	25.0	75	85	13	88
Automotive transmission repair	733	25.0	183	85	32	215
Carburetor repair shops	799	25.0	200	85	35	235
Brake, front end & wheel alignment	566	25.0	142	85	25	167
Electrical repair shops, motor vehicle	100	25.0	25	85	4	29
Paint or body repair shops	8,161	25.0	2,040	85	360	2,400
Automotive glass replacement	2,498	25.0	625	85	110	735
Automotive oil change & lubrication shops	1,199	25.0	300	85	53	353
Carwashes	1,499	25.0	375	85	66	441

Table D-2 (continued)

DOWNTOWN FARMINGTON TRADE AREA
SERVICES PURCHASING POWER, MARKET SHARE AND SALES POTENTIAL, 2020
BY SERVICES CATEGORY
(In Thousands of Dollars)

Category	Resident Purchasing Power	Estimated Market Share	Trade Area Sales	Trade Area Percent	Other Shoppers	Estimated Total Sales
Health Care						
Offices of physicians						
Offices of physicians (except mental health specialist	$ 40,673	20.0%	$ 8,135	85%	$ 1,436	$ 9,571
Offices of physicians, mental health specialists	933	20.0	187	85	33	220
Offices of dentists	15,323	20.0	3,065	85	541	3,606
Offices of other health practitioners						
Offices of chiropractors	3,098	20.0	620	85	109	729
Offices of optometrists	1,099	20.0	220	85	39	259
Offices of mental health practitioners (except physicians)	866	20.0	173	85	31	204
Offices of physical, occup, & speech therapists & audiologists						
Speech therapist & audiologists	167	20.0	33	85	6	39
Physical & occupational therapists	2,465	20.0	493	85	87	580
Offices of all other health practitioners						
Offices of podiatrists	266	20.0	53	85	9	62
Offices of all other misc. health practitioners	1,499	20.0	300	85	53	353
Outpatient care centers						
Outpatient mental health & substance abuse centers	2,865	10.0	287	85	51	338
Other outpatient care centers						
Kidney dialysis centers	1,166	10.0	117	85	21	138
All other outpatient care centers	1,699	10.0	170	85	30	200
Home health care services	5,197	10.0	520	85	92	612

Source: McComb Group, Ltd.

Table D-2 (continued)

DOWNTOWN FARMINGTON TRADE AREA
SERVICES PURCHASING POWER, MARKET SHARE AND SALES POTENTIAL, 2025
BY SERVICES CATEGORY
(In Thousands of Dollars)

Category	Resident Purchasing Power	Estimated Market Share	Trade Area Sales	Trade Area Percent	Other Shoppers	Estimated Total Sales
Personal Care Services						
Barber shops	$ 317	25.0%	$ 79	85%	$ 14	$ 93
Beauty shops	10,157	25.0	2,539	85	448	2,987
Nail salons	589	25.0	147	85	26	173
Diet & weight reducing services	907	25.0	227	85	40	267
Other personal care services	1,043	25.0	261	85	46	307
Drycleaning and Laundry Services						
Coin-operated laundries & drycleaners	$ 1,270	25.0%	$ 318	85%	$ 56	$ 374
Drycleaning & laundry services (except coin-op.)	2,811	25.0	703	85	124	827
Other Personal Services						
Photofinishing	$ 2,585	25.0%	$ 646	85%	$ 114	$ 760
Photofinishing Laboratories	2,086	25.0	522	85	92	614
One Hour Photo Finishing	499	25.0	125	85	22	147
Child Day Care Services	9,704	25.0	2,426	85	428	2,854
Funeral Homes & Funeral Services	2,721	25.0	680	85	120	800
Photographic Services	9,522	25.0	2,381	85	420	2,801
Photographic Studios	3,038	25.0	760	85	134	894
Veteranarian Services	6,076	25.0	1,519	85	268	1,787
Pet Care	907	25.0	227	85	40	267
Rental and Leasing						
Formalwear and costume rental	$ 363	25.0%	91	85%	$ 16	$ 107
Video tape and disc rental	3,310	25.0	828	85	146	974
Recreation						
Bowling centers	$ 2,086	25.0%	522	85%	$ 92	$ 614
Physical fitness facilites	10,157	25.0	2,539	85	448	2,987
Golf courses and country clubs	7,346	25.0	1,837	85	324	2,161
Professional Services						
Offices of real estate agents & brokers	$ 33,237	25.0%	$ 8,309	85%	$ 1,466	$ 9,775
Offices of real estate appraisers	4,308	25.0	1,077	85	190	1,267
Household Goods Repair						
Home & Garden Equipment & Appliance Repair	$ 1,043	25.0%	$ 261	85%	$ 46	$ 307
Reupholstery & furniture repair	726	25.0	182	85	32	214
Footwear & leather goods repair	91	25.0	23	85	4	27
Watch, clock & jewelry repair	181	25.0	45	85	8	53
Garment repair & alteration services	136	25.0	34	85	6	40
Automotive Repair and Maintenance						
General automotive repair	$ 15,644	25.0%	$ 3,911	85%	$ 690	$ 4,601
Automotive exhaust system repair	408	25.0	102	85	18	120
Automotive transmission repair	998	25.0	250	85	44	294
Carburetor repair shops	1,088	25.0	272	85	48	320
Brake, front end & wheel alignment	771	25.0	193	85	34	227
Electrical repair shops, motor vehicle	136	25.0	34	85	6	40
Paint or body repair shops	11,109	25.0	2,777	85	490	3,267
Automotive glass replacement	3,401	25.0	850	85	150	1,000
Automotive oil change & lubrication shops	1,632	25.0	408	85	72	480
Carwashes	2,040	25.0	510	85	90	600

Table D-2 (continued)

DOWNTOWN FARMINGTON TRADE AREA
SERVICES PURCHASING POWER, MARKET SHARE AND SALES POTENTIAL, 2025
BY SERVICES CATEGORY
(In Thousands of Dollars)

Category	Resident Purchasing Power	Estimated Market Share	Trade Area Sales	Trade Area Percent	Other Shoppers	Estimated Total Sales
Health Care						
Offices of physicians						
Offices of physicians (except mental health speciali	$ 55,365	20.0%	$ 11,073	85%	$ 1,954	$ 13,027
Offices of physicians, mental health specialists	1,270	20.0	254	85	45	299
Offices of dentists	20,858	20.0	4,172	85	736	4,908
Offices of other health practitioners						
Offices of chiropractors	4,217	20.0	843	85	149	992
Offices of optometrists	1,496	20.0	299	85	53	352
Offices of mental health practitioners (except physicians)	1,179	20.0	236	85	42	278
Offices of physical, occup, & speech therapists & audiologists						
Speech therapist & audiologists	227	20.0	45	85	8	53
Physical & occupational therapists	3,355	20.0	671	85	118	789
Offices of all other health practitioners						
Offices of podiatrists	363	20.0	73	85	13	86
Offices of all other misc. health practitioners	2,040	20.0	408	85	72	480
Outpatient care centers						
Outpatient mental health & substance abuse centers	3,900	10.0	390	85	69	459
Other outpatient care centers						
Kidney dialysis centers	1,587	10.0	159	85	28	187
All other outpatient care centers	2,313	10.0	231	85	41	272
Home health care services	7,074	10.0	707	85	125	832

Source: McComb Group, Ltd.

Table D-2 (continued)

DOWNTOWN FARMINGTON TRADE AREA
SERVICES PURCHASING POWER, MARKET SHARE AND SALES POTENTIAL, 2030
BY SERVICES CATEGORY
(In Thousands of Dollars)

Category	Resident Purchasing Power	Estimated Market Share	Trade Area Sales	Trade Area Percent	Other Shoppers	Estimated Total Sales
Personal Care Services						
Barber shops	$ 432	25.0%	$ 108	85%	$ 19	$ 127
Beauty shops	13,826	25.0	3,457	85	610	4,067
Nail salons	802	25.0	201	85	35	236
Diet & weight reducing services	1,234	25.0	309	85	55	364
Other personal care services	1,420	25.0	355	85	63	418
Drycleaning and Laundry Services						
Coin-operated laundries & drycleaners	$ 1,728	25.0%	$ 432	85%	$ 76	$ 508
Drycleaning & laundry services (except coin-op.)	3,827	25.0	957	85	169	1,126
Other Personal Services						
Photofinishing	$ 3,518	25.0%	$ 880	85%	$ 155	$ 1,035
Photofinishing Laboratories	2,839	25.0	710	85	125	835
One Hour Photo Finishing	679	25.0	170	85	30	200
Child Day Care Services	13,209	25.0	3,302	85	583	3,885
Funeral Homes & Funeral Services	3,703	25.0	926	85	163	1,089
Photographic Services	12,962	25.0	3,241	85	572	3,813
Photographic Studios	4,135	25.0	1,034	85	182	1,216
Veteranarian Services	8,271	25.0	2,068	85	365	2,433
Pet Care	1,234	25.0	309	85	55	364
Rental and Leasing						
Formalwear and costume rental	$ 494	25.0%	124	85%	$ 22	$ 146
Video tape and disc rental	4,506	25.0	1,127	85	199	1,326
Recreation						
Bowling centers	$ 2,839	25.0%	710	85%	$ 125	$ 835
Physical fitness facilites	13,826	25.0	3,457	85	610	4,067
Golf courses and country clubs	9,999	25.0	2,500	85	441	2,941
Professional Services						
Offices of real estate agents & brokers	$ 45,243	25.0%	$ 11,311	85%	$ 1,996	$ 13,307
Offices of real estate appraisers	5,864	25.0	1,466	85	259	1,725
Household Goods Repair						
Home & Garden Equipment & Appliance Repair	$ 1,420	25.0%	$ 355	85%	$ 63	$ 418
Reupholstery & furniture repair	988	25.0	247	85	44	291
Footwear & leather goods repair	123	25.0	31	85	5	36
Watch, clock & jewelry repair	247	25.0	62	85	11	73
Garment repair & alteration services	185	25.0	46	85	8	54
Automotive Repair and Maintenance						
General automotive repair	$ 21,295	25.0%	$ 5,324	85%	$ 940	$ 6,264
Automotive exhaust system repair	556	25.0	139	85	25	164
Automotive transmission repair	1,358	25.0	340	85	60	400
Carburetor repair shops	1,481	25.0	370	85	65	435
Brake, front end & wheel alignment	1,049	25.0	262	85	46	308
Electrical repair shops, motor vehicle	185	25.0	46	85	8	54
Paint or body repair shops	15,122	25.0	3,781	85	667	4,448
Automotive glass replacement	4,629	25.0	1,157	85	204	1,361
Automotive oil change & lubrication shops	2,222	25.0	556	85	98	654
Carwashes	2,778	25.0	695	85	123	818

Table D-2 (continued)

DOWNTOWN FARMINGTON TRADE AREA
SERVICES PURCHASING POWER, MARKET SHARE AND SALES POTENTIAL, 2030
BY SERVICES CATEGORY
(In Thousands of Dollars)

Category	Resident Purchasing Power	Estimated Market Share	Trade Area Sales	Trade Area Percent	Other Shoppers	Estimated Total Sales
Health Care						
Offices of physicians						
Offices of physicians (except mental health speciali	$ 75,365	20.0%	$ 15,073	85%	$ 2,660	$ 17,733
Offices of physicians, mental health specialists	1,728	20.0	346	85	61	407
Offices of dentists	28,393	20.0	5,679	85	1,002	6,681
Offices of other health practitioners						
Offices of chiropractors	5,740	20.0	1,148	85	203	1,351
Offices of optometrists	2,037	20.0	407	85	72	479
Offices of mental health practitioners (except physicians)	1,605	20.0	321	85	57	378
Offices of physical, occup, & speech therapists & audiologists						
Speech therapist & audiologists	309	20.0	62	85	11	73
Physical & occupational therapists	4,568	20.0	914	85	161	1,075
Offices of all other health practitioners						
Offices of podiatrists	494	20.0	99	85	17	116
Offices of all other misc. health practitioners	2,778	20.0	556	85	98	654
Outpatient care centers						
Outpatient mental health & substance abuse centers	5,308	10.0	531	85	94	625
Other outpatient care centers						
Kidney dialysis centers	2,160	10.0	216	85	38	254
All other outpatient care centers	3,148	10.0	315	85	56	371
Home health care services	9,629	10.0	963	85	170	1,133

Source: McComb Group, Ltd.

Appendix E

RETAIL AND SERVICES
SALES POTENTIAL AND SUPPORTABLE SPACE

Table E-1

DOWNTOWN FARMINGTON TRADE AREA
RETAIL SALES POTENTIAL AND SUPPORTABLE SPACE, 2010
BY MERCHANDISE CATEGORY

Category	Estimated Sales Potential	Sales Per Sq. Ft.	Supportable Square Feet	Median Store Size
SHOPPING GOODS				
General Merchandise				
Department stores	$ 0	$ 175	0	NA
Discount stores	7,570,000	175	43,257	110,000
Department Stores	3,806,000	175	21,749	150,000
Other general merchandise stores				
Warehouse Clubs and Supercenters	$ 1,903,000	$ 450	4,229	185,000
Variety stores	193,000	220	877	5,000
Miscellaneous general mdse.	951,000	250	3,804	80,000
Apparel & Accessories				
Clothing Stores	$ 4,392,000	$ 250	17,568	NA
Mens and boys	216,000	220	982	4,000
Womens clothing	1,044,000	200	5,220	4,200
Children's & infant	252,000	240	1,050	3,900
Family clothing	2,472,000	260	9,508	4,900
Clothing accessories stores	84,000	290	290	1,400
Other clothing stores	324,000	265	1,223	2,725
Shoe Stores	$ 719,000	$ 250	2,876	NA
Men's	43,000	290	148	2,200
Women's	52,000	270	193	2,400
Children's & infant	24,000	290	83	2,200
Family shoe stores	408,000	175	2,331	3,400
Athletic footwear	192,000	175	1,097	3,300
Furniture & Home Furnishings				
Furniture	$ 2,052,000	$ 260	7,892	7,900
Floor coverings	1,044,000	225	4,640	3,600
Window treatment stores	48,000	210	229	4,900
All other home furnishings stores	960,000	175	5,486	3,500
Electronics & Appliances Stores	$ 4,392,000	$ 350	12,549	NA
Household appliance stores	624,000	275	2,269	4,200
Radio, tv & electronics stores	2,940,000	300	9,800	2,500
Computers & Software	828,000	580	1,428	3,400
Other Shopping Goods	$ 0	$ 300	0	NA
Sporting goods	1,920,000	200	9,600	7,500
General Line Sporting Gds.	825,000	200	4,125	7,500
Specialty Line Sporting Gds.	1,095,000	225	4,867	2,900
Book stores & newsdealers	492,000	160	3,075	2,300
Stationery Stores and Office Supply	732,000	375	1,952	1,000
Musical Instrument & Supplies	324,000	240	1,350	7,300
Jewelry stores	1,035,000	325	3,185	1,500
Hobby, toy & game	600,000	175	3,429	2,740
Camera & photographic supply	276,000	275	1,004	2,200
Gift, novelty & souvenirs	768,000	150	5,120	3,000
Luggage & leather goods	48,000	200	240	2,300
Sewing, needlework & piece goods	300,000	100	3,000	12,400
Pet stores	444,000	200	2,220	2,900
Art dealers	108,000	225	480	2,000
Optical goods stores	451,000	290	1,555	1,500
Pre-Recorded Tapes, Compact Discs	272,000	230	1,183	3,500
Cosmetics, beauty supplies & perfume	213,000	320	666	2,000
All other health & personal care	444,000	275	1,615	1,650

Table E-1 (continued)

DOWNTOWN FARMINGTON TRADE AREA
RETAIL SALES POTENTIAL AND SUPPORTABLE SPACE, 2010
BY MERCHANDISE CATEGORY

Category	Estimated Sales Potential	Sales Per Sq. Ft.	Supportable Square Feet	Median Store Size
CONVENIENCE GOODS				
Food Stores				
Grocery stores	$ 25,848,000	$ 400	64,620	52,500
Supermarkets	25,348,000	400	63,370	52,500
Convenience food	338,000	300	1,127	2,000
Specialty food stores	412,000	200	2,060	2,400
Meat Markets	138,000	225	613	2,300
Fish & Seafood Markets	50,000	250	200	2,200
Fruit & Vegetable Markets	88,000	200	440	2,000
Other Specialty Food Stores	138,000	225	613	2,000
Baked Goods	50,000	250	200	1,800
Confectionery and Nut Stores	38,000	320	119	1,200
All Other Specialty Food Stores	50,000	200	250	2,200
Other Convenience Goods				
Drug & proprietary stores	$ 9,630,000	$ 460	20,935	11,700
Hardware	1,372,000	185	7,416	7,857
Liquor	2,448,000	375	6,528	2,900
Florist	667,000	190	3,511	1,600
Food/health supplement stores	222,000	250	888	1,500
Food Service & Drinking Places				
Food Service				
Full-service restaurants	$ 10,416,000	$ 360	28,933	4,500
Limited service restaurants	14,275,000	400	35,688	3,400
Cafeterias	0	235	0	10,000
Snack & beverage places	855,000	300	2,850	1,500
Ice Cream & Soft Serve	135,000	325	415	1,200
Frozen Yogurt	15,000	200	75	1,200
Doughnut Shops	180,000	220	818	1,200
Bagel Shops	91,000	275	331	2,150
Coffee Shops	255,000	400	638	1,500
Cookie Shops	15,000	400	38	1,200
Other Snack Shops	165,000	360	458	2,200
Drinking Places	$ 0	$ 250	0	N/A
Gasoline Svs Stations/Conv.				
Gas/Convenience food stores	$ 29,391,000	$ 1,400	20,994	2,400
Other Gas Stations & Truck Stops	3,356,000	1,000	3,356	2,000
OTHER RETAIL STORES				
Building Materials & Garden Supplies	$ 0	$ 350	0	N/A
Building materials & supplies stores	12,693,000	350	36,266	120,000
Home centers	7,651,000	350	21,860	120,000
Paint, glass & wallpaper	574,000	225	2,551	3,750
Other building materials dealers	4,831,000	225	21,471	N/A
Lawn & garden equipment				
Outdoor power equipment	352,000	100	3,520	N/A
Retail nurseries, lawn & garden	1,353,000	100	13,530	15,000
Motor Vehicles & Parts Dealers				
Auto parts, accessories & tires				
Auto parts & accessories stores	$ 1,968,000	$ 200	9,840	6,500
Tire dealers	756,000	200	3,780	2,500
Auto Dealers	26,772,000	1,050	25,497	

Source: McComb Group, Ltd.

Table E-1 (continued)

DOWNTOWN FARMINGTON TRADE AREA
RETAIL SALES POTENTIAL AND SUPPORTABLE SPACE, 2015
BY MERCHANDISE CATEGORY

Category	Estimated Sales Potential	Sales Per Sq. Ft.	Supportable Square Feet	Median Store Size
SHOPPING GOODS				
General Merchandise				
Department stores	$ 0	$ 175	0	NA
Discount stores	9,757,000	175	55,754	110,000
Department Stores	4,906,000	175	28,034	150,000
Other general merchandise stores				
Warehouse Clubs and Supercenters	$ 2,453,000	$ 450	5,451	185,000
Variety stores	$ 249,000	$ 220	1,132	5,000
Miscellaneous general mdse.	1,227,000	250	4,908	80,000
Apparel & Accessories				
Clothing Stores	$ 5,661,000	$ 250	22,644	NA
Mens and boys	279,000	220	1,268	4,000
Womens clothing	1,345,000	200	6,725	4,200
Children's & infant	325,000	240	1,354	3,900
Family clothing	3,187,000	260	12,258	4,900
Clothing accessories stores	108,000	290	372	1,400
Other clothing stores	417,000	265	1,574	2,725
Shoe Stores	$ 927,000	$ 250	3,708	NA
Men's	55,000	290	190	2,200
Women's	67,000	270	248	2,400
Children's & infant	31,000	290	107	2,200
Family shoe stores	525,000	175	3,000	3,400
Athletic footwear	248,000	175	1,417	3,300
Furniture & Home Furnishings				
Furniture	$ 2,645,000	$ 260	10,173	7,900
Floor coverings	1,345,000	225	5,978	3,600
Window treatment stores	61,000	210	290	4,900
All other home furnishings stores	1,237,000	175	7,069	3,500
Electronics & Appliances Stores	$ 5,661,000	$ 350	16,174	NA
Household appliance stores	804,000	275	2,924	4,200
Radio, tv & electronics stores	3,789,000	300	12,630	2,500
Computers & Software	1,068,000	580	1,841	3,400
Other Shopping Goods	$ 0	$ 300	0	NA
Sporting goods	2,475,000	200	12,375	7,500
General Line Sporting Gds.	1,064,000	200	5,320	7,500
Specialty Line Sporting Gds.	1,412,000	225	6,276	2,900
Book stores & newsdealers	635,000	160	3,969	2,300
Stationery Stores and Office Supply	944,000	375	2,517	1,000
Musical Instrument & Supplies	417,000	240	1,738	7,300
Jewelry stores	1,335,000	325	4,108	1,500
Hobby, toy & game	773,000	175	4,417	2,740
Camera & photographic supply	356,000	275	1,295	2,200
Gift, novelty & souvenirs	991,000	150	6,607	3,000
Luggage & leather goods	61,000	200	305	2,300
Sewing, needlework & piece goods	387,000	100	3,870	12,400
Pet stores	572,000	200	2,860	2,900
Art dealers	139,000	225	618	2,000
Optical goods stores	580,000	290	2,000	1,500
Pre-Recorded Tapes, Compact Discs	351,000	230	1,526	3,500
Cosmetics, beauty supplies & perfume	276,000	320	863	2,000
All other health & personal care	572,000	275	2,080	1,650

Table E-1 (continued)

DOWNTOWN FARMINGTON TRADE AREA
RETAIL SALES POTENTIAL AND SUPPORTABLE SPACE, 2015
BY MERCHANDISE CATEGORY

Category	Estimated Sales Potential	Sales Per Sq. Ft.	Supportable Square Feet	Median Store Size
CONVENIENCE GOODS				
Food Stores				
Grocery stores	$ 33,320,000	$ 400	83,300	52,500
Supermarkets	32,675,000	400	81,688	52,500
Convenience food	436,000	300	1,453	2,000
Specialty food stores	532,000	200	2,660	2,400
Meat Markets	178,000	225	791	2,300
Fish & Seafood Markets	64,000	250	256	2,200
Fruit & Vegetable Markets	113,000	200	565	2,000
Other Specialty Food Stores	178,000	225	791	2,000
Baked Goods	64,000	250	256	1,800
Confectionery and Nut Stores	49,000	320	153	1,200
All Other Specialty Food Stores	64,000	200	320	2,200
Other Convenience Goods				
Drug & proprietary stores	$ 12,413,000	$ 460	26,985	11,700
Hardware	1,768,000	185	9,557	7,857
Liquor	3,156,000	375	8,416	2,900
Florist	860,000	190	4,526	1,600
Food/health supplement stores	287,000	250	1,148	1,500
Food Service & Drinking Places				
Food Service				
Full-service restaurants	$ 13,427,000	$ 360	37,297	4,500
Limited service restaurants	18,400,000	400	46,000	3,400
Cafeterias	0	235	0	10,000
Snack & beverage places	1,103,000	300	3,677	1,500
Ice Cream & Soft Serve	175,000	325	538	1,200
Frozen Yogurt	20,000	200	100	1,200
Doughnut Shops	232,000	220	1,055	1,200
Bagel Shops	116,000	275	422	2,150
Coffee Shops	329,000	400	823	1,500
Cookie Shops	20,000	400	50	1,200
Other Snack Shops	213,000	360	592	2,200
Drinking Places	$ 0	$ 250	0	N/A
Gasoline Svs Stations/Conv.				
Gas/Convenience food stores	$ 37,887,000	$ 1,400	27,062	2,400
Other Gas Stations & Truck Stops	4,326,000	1,000	4,326	2,000
OTHER RETAIL STORES				
Building Materials & Garden Supplies	$ 0	$ 350	0	N/A
Building materials & supplies stores	16,361,000	350	46,746	120,000
Home centers	9,861,000	350	28,174	120,000
Paint, glass & wallpaper	740,000	225	3,289	3,750
Other building materials dealers	6,227,000	225	27,676	N/A
Lawn & garden equipment				
Outdoor power equipment	454,000	100	4,540	N/A
Retail nurseries, lawn & garden	1,744,000	100	17,440	15,000
Motor Vehicles & Parts Dealers				
Auto parts, accessories & tires				
Auto parts & accessories stores	$ 2,537,000	$ 200	12,685	6,500
Tire dealers	975,000	200	4,875	2,500
Auto Dealers	34,511,000	1,050	32,868	

Source: McComb Group, Ltd.

Table E-1 (continued)

DOWNTOWN FARMINGTON TRADE AREA
RETAIL SALES POTENTIAL AND SUPPORTABLE SPACE, 2020
BY MERCHANDISE CATEGORY

Category	Estimated Sales Potential	Sales Per Sq. Ft.	Supportable Square Feet	Median Store Size
SHOPPING GOODS				
General Merchandise				
Department stores	$ 0	$ 175	0	NA
Discount stores	12,283,000	175	70,189	110,000
Department Stores	6,176,000	175	35,291	150,000
Other general merchandise stores				
Warehouse Clubs and Supercenters	$ 3,089,000	$ 450	6,864	185,000
Variety stores	$ 313,000	$ 220	1,423	5,000
Miscellaneous general mdse.	1,544,000	250	6,176	80,000
Apparel & Accessories				
Clothing Stores	$ 7,127,000	$ 250	28,508	NA
Mens and boys	351,000	220	1,595	4,000
Womens clothing	1,695,000	200	8,475	4,200
Children's & infant	409,000	240	1,704	3,900
Family clothing	4,012,000	260	15,431	4,900
Clothing accessories stores	136,000	290	469	1,400
Other clothing stores	525,000	265	1,981	2,725
Shoe Stores	$ 1,165,000	$ 250	4,660	NA
Men's	69,000	290	238	2,200
Women's	84,000	270	311	2,400
Children's & infant	39,000	290	134	2,200
Family shoe stores	663,000	175	3,789	3,400
Athletic footwear	312,000	175	1,783	3,300
Furniture & Home Furnishings				
Furniture	$ 3,329,000	$ 260	12,804	7,900
Floor coverings	1,695,000	225	7,533	3,600
Window treatment stores	77,000	210	367	4,900
All other home furnishings stores	1,557,000	175	8,897	3,500
Electronics & Appliances Stores	$ 7,127,000	$ 350	20,363	NA
Household appliance stores	1,012,000	275	3,680	4,200
Radio, tv & electronics stores	4,771,000	300	15,903	2,500
Computers and Software	1,344,000	580	2,317	3,400
Other Shopping Goods	$ 0	$ 300	0	NA
Sporting goods	3,116,000	200	15,580	7,500
General Line Sporting Gds.	1,339,000	200	6,695	7,500
Specialty Line Sporting Gds.	1,777,000	225	7,898	2,900
Book stores & newsdealers	799,000	160	4,994	2,300
Stationery Stores and Office Supply	1,188,000	375	3,168	1,000
Musical Instrument & Supplies	525,000	240	2,188	7,300
Jewelry stores	1,680,000	325	5,169	1,500
Hobby, toy & game	973,000	175	5,560	2,740
Camera & photographic supply	448,000	275	1,629	2,200
Gift, novelty & souvenirs	1,247,000	150	8,313	3,000
Luggage & leather goods	77,000	200	385	2,300
Sewing, needlework & piece goods	487,000	100	4,870	12,400
Pet stores	720,000	200	3,600	2,900
Art dealers	175,000	225	778	2,000
Optical goods stores	731,000	290	2,521	1,500
Pre-Recorded Tapes, Compact Discs	441,000	230	1,917	3,500
Cosmetics, beauty supplies & perfume	347,000	320	1,084	2,000
All other health & personal care	720,000	275	2,618	1,650

Table E-1 (continued)

DOWNTOWN FARMINGTON TRADE AREA
RETAIL SALES POTENTIAL AND SUPPORTABLE SPACE, 2020
BY MERCHANDISE CATEGORY

Category	Estimated Sales Potential	Sales Per Sq. Ft.	Supportable Square Feet	Median Store Size
CONVENIENCE GOODS				
Food Stores				
Grocery stores	$ 41,946,000	$ 400	104,865	52,500
Supermarkets	41,134,000	400	102,835	52,500
Convenience food	548,000	300	1,827	2,000
Specialty food stores	670,000	200	3,350	2,400
Meat Markets	223,000	225	991	2,300
Fish & Seafood Markets	81,000	250	324	2,200
Fruit & Vegetable Markets	142,000	200	710	2,000
Other Specialty Food Stores	223,000	225	991	2,000
Baked Goods	81,000	250	324	1,800
Confectionery and Nut Stores	61,000	320	191	1,200
All Other Specialty Food Stores	81,000	200	405	2,200
Other Convenience Goods				
Drug & proprietary stores	$ 15,627,000	$ 460	33,972	11,700
Hardware	2,225,000	185	12,027	7,857
Liquor	3,973,000	375	10,595	2,900
Florist	1,082,000	190	5,695	1,600
Food/health supplement stores	361,000	250	1,444	1,500
Food Service & Drinking Places				
Food Service				
Full-service restaurants	$ 16,903,000	$ 360	46,953	4,500
Limited service restaurants	23,164,000	400	57,910	3,400
Cafeterias	0	235	0	10,000
Snack & beverage places	1,387,000	300	4,623	1,500
Ice Cream & Soft Serve	219,000	325	674	1,200
Frozen Yogurt	24,000	200	120	1,200
Doughnut Shops	292,000	220	1,327	1,200
Bagel Shops	147,000	275	535	2,150
Coffee Shops	413,000	400	1,033	1,500
Cookie Shops	24,000	400	60	1,200
Other Snack Shops	268,000	360	744	2,200
Drinking Places	$ 0	$ 250	0	N/A
Gasoline Svs Stations/Conv.				
Gas/Convenience food stores	$ 47,694,000	$ 1,400	34,067	2,400
Other Gas Stations & Truck Stops	5,446,000	1,000	5,446	2,000
OTHER RETAIL STORES				
Building Materials & Garden Supplies	$ 0	$ 350	0	N/A
Building materials & supplies stores	20,598,000	350	58,851	120,000
Home centers	12,414,000	350	35,469	120,000
Paint, glass & wallpaper	932,000	225	4,142	3,750
Other building materials dealers	7,840,000	225	34,844	N/A
Lawn & garden equipment				
Outdoor power equipment	571,000	100	5,710	N/A
Retail nurseries, lawn & garden	2,195,000	100	21,950	15,000
Motor Vehicles & Parts Dealers				
Auto parts, accessories & tires				
Auto parts & accessories stores	$ 3,193,000	$ 200	15,965	6,500
Tire dealers	1,227,000	200	6,135	2,500
Auto Dealers	43,444,000	1,050	41,375	

Source: McComb Group, Ltd.

Table E-1 (continued)

DOWNTOWN FARMINGTON TRADE AREA
RETAIL SALES POTENTIAL AND SUPPORTABLE SPACE, 2025
BY MERCHANDISE CATEGORY

Category	Estimated Sales Potential	Sales Per Sq. Ft.	Supportable Square Feet	Median Store Size
SHOPPING GOODS				
General Merchandise				
Department stores	$ 0	$ 175	0	NA
Discount stores	15,207,000	175	86,897	110,000
Conventional	7,646,000	175	43,691	150,000
Other general merchandise stores				
Variety stores	$ 3,823,000	$ 450	8,496	185,000
Variety stores	387,000	220	1,759	5,000
Miscellaneous general mdse.	1,911,000	250	7,644	80,000
Apparel & Accessories				
Clothing Stores	$ 8,824,000	$ 250	35,296	NA
Mens and boys	433,000	220	1,968	4,000
Womens clothing	2,097,000	200	10,485	4,200
Children's & infant	507,000	240	2,113	3,900
Family clothing	4,967,000	260	19,104	4,900
Clothing accessories stores	169,000	290	583	1,400
Other clothing stores	651,000	265	2,457	2,725
Shoe Stores	$ 1,444,000	$ 250	5,776	NA
Men's	85,000	290	293	2,200
Women's	104,000	270	385	2,400
Children's & infant	48,000	290	166	2,200
Family shoe stores	820,000	175	4,686	3,400
Athletic footwear	385,000	175	2,200	3,300
Furniture & Home Furnishings				
Furniture	$ 4,123,000	$ 260	15,858	7,900
Floor coverings	2,097,000	225	9,320	3,600
Window treatment stores	96,000	210	457	4,900
All other home furnishings stores	1,928,000	175	11,017	3,500
Electronics & Appliances Stores	$ 8,824,000	$ 350	25,211	NA
Household appliance stores	1,253,000	275	4,556	4,200
Radio, tv & electronics stores	5,907,000	300	19,690	2,500
Computers and Software	1,664,000	580	2,869	3,400
Other Shopping Goods	$ 0	$ 300	0	NA
Sporting goods	3,857,000	200	19,285	7,500
General Line Sporting Gds.	1,657,000	200	8,285	7,500
Specialty Line Sporting Gds.	2,200,000	225	9,778	2,900
Book stores & newsdealers	988,000	160	6,175	2,300
Stationery Stores and Office Supply	1,471,000	375	3,923	1,000
Musical Instrument & Supplies	651,000	240	2,713	7,300
Jewelry stores	2,080,000	325	6,400	1,500
Hobby, toy & game	1,205,000	175	6,886	2,740
Camera & photographic supply	555,000	275	2,018	2,200
Gift, novelty & souvenirs	1,543,000	150	10,287	3,000
Luggage & leather goods	96,000	200	480	2,300
Sewing, needlework & piece goods	603,000	100	6,030	12,400
Pet stores	892,000	200	4,460	2,900
Art dealers	217,000	225	964	2,000
Optical goods stores	904,000	290	3,117	1,500
Pre-Recorded Tapes, Compact Discs	545,000	230	2,370	3,500
Cosmetics, beauty supplies & perfume	429,000	320	1,341	2,000
All other health & personal care	892,000	275	3,244	1,650

Table E-1 (continued)

DOWNTOWN FARMINGTON TRADE AREA
RETAIL SALES POTENTIAL AND SUPPORTABLE SPACE, 2025
BY MERCHANDISE CATEGORY

Category	Estimated Sales Potential	Sales Per Sq. Ft.	Supportable Square Feet	Median Store Size
CONVENIENCE GOODS				
Food Stores				
Grocery stores	$ 51,931,000	$ 400	129,828	52,500
Supermarkets	50,925,000	400	127,313	52,500
Convenience food	678,000	300	2,260	2,000
Specialty food stores	829,000	200	4,145	2,400
Meat Markets	277,000	225	1,231	2,300
Fish & Seafood Markets	101,000	250	404	2,200
Fruit & Vegetable Markets	176,000	200	880	2,000
Other Specialty Food Stores	277,000	225	1,231	2,000
Baked Goods	101,000	250	404	1,800
Confectionery and Nut Stores	76,000	320	238	1,200
All Other Specialty Food Stores	101,000	200	505	2,200
Other Convenience Goods				
Drug & proprietary stores	$ 19,347,000	$ 460	42,059	11,700
Hardware	2,755,000	185	14,892	7,857
Liquor	4,919,000	375	13,117	2,900
Florist	1,340,000	190	7,053	1,600
Food/health supplement stores	447,000	250	1,788	1,500
Food Service & Drinking Places				
Food Service				
Full-service restaurants	$ 20,925,000	$ 360	58,125	4,500
Limited service restaurants	28,676,000	400	71,690	3,400
Cafeterias	0	235	0	10,000
Snack & beverage places	1,717,000	300	5,723	1,500
Ice Cream & Soft Serve	272,000	325	837	1,200
Frozen Yogurt	31,000	200	155	1,200
Doughnut Shops	361,000	220	1,641	1,200
Bagel Shops	181,000	275	658	2,150
Coffee Shops	512,000	400	1,280	1,500
Cookie Shops	31,000	400	78	1,200
Other Snack Shops	332,000	360	922	2,200
Drinking Places	$ 0	$ 250	0	N/A
Gasoline Svs Stations/Conv.				
Gas/Convenience food stores	$ 59,000,000	$ 1,400	42,143	2,400
Other Gas Stations & Truck Stops	6,741,000	1,000	6,741	2,000
OTHER RETAIL STORES				
Building Materials & Garden Supplies	$ 0	$ 350	0	N/A
Building materials & supplies stores	25,500,000	350	72,857	120,000
Home centers	15,369,000	350	43,911	120,000
Paint, glass & wallpaper	1,154,000	225	5,129	3,750
Other building materials dealers	9,706,000	225	43,138	N/A
Lawn & garden equipment				
Outdoor power equipment	707,000	100	7,070	N/A
Retail nurseries, lawn & garden	2,718,000	100	27,180	15,000
Motor Vehicles & Parts Dealers				
Auto parts, accessories & tires				
Auto parts & accessories stores	$ 3,953,000	$ 200	19,765	6,500
Tire dealers	1,519,000	200	7,595	2,500
Auto Dealers	53,785,000	1,050	51,224	

Source: McComb Group, Ltd.

Table E-1 (continued)

DOWNTOWN FARMINGTON TRADE AREA
RETAIL SALES POTENTIAL AND SUPPORTABLE SPACE, 2030
BY MERCHANDISE CATEGORY

Category	Estimated Sales Potential	Sales Per Sq. Ft.	Supportable Square Feet	Median Store Size
SHOPPING GOODS				
General Merchandise				
Department stores	$ 0	$ 175	0	NA
Discount stores	18,560,000	175	106,057	110,000
Conventional	9,331,000	175	53,320	150,000
Other general merchandise stores				
Variety stores	$ 4,666,000	$ 450	10,369	185,000
Variety stores	473,000	220	2,150	5,000
Miscellaneous general mdse.	2,333,000	250	9,332	80,000
Apparel & Accessories				
Clothing Stores	$ 10,769,000	$ 250	43,076	NA
Mens and boys	529,000	220	2,405	4,000
Womens clothing	2,560,000	200	12,800	4,200
Children's & infant	617,000	240	2,571	3,900
Family clothing	6,061,000	260	23,312	4,900
Clothing accessories stores	205,000	290	707	1,400
Other clothing stores	795,000	265	3,000	2,725
Shoe Stores	$ 1,761,000	$ 250	7,044	NA
Men's	105,000	290	362	2,200
Women's	127,000	270	470	2,400
Children's & infant	59,000	290	203	2,200
Family shoe stores	1,000,000	175	5,714	3,400
Athletic footwear	471,000	175	2,691	3,300
Furniture & Home Furnishings				
Furniture	$ 5,032,000	$ 260	19,354	7,900
Floor coverings	2,560,000	225	11,378	3,600
Window treatment stores	117,000	210	557	4,900
All other home furnishings stores	2,353,000	175	13,446	3,500
Electronics & Appliances Stores	$ 10,769,000	$ 350	30,769	NA
Household appliance stores	1,531,000	275	5,567	4,200
Radio, tv & electronics stores	7,209,000	300	24,030	2,500
Computers and Software	2,031,000	580	3,502	3,400
Other Shopping Goods	$ 0	$ 300	0	NA
Sporting goods	4,708,000	200	23,540	7,500
General Line Sporting Gds.	2,023,000	200	10,115	7,500
Specialty Line Sporting Gds.	2,685,000	225	11,933	2,900
Book stores & newsdealers	1,207,000	160	7,544	2,300
Stationery Stores and Office Supply	1,795,000	375	4,787	1,000
Musical Instrument & Supplies	795,000	240	3,313	7,300
Jewelry stores	2,537,000	325	7,806	1,500
Hobby, toy & game	1,471,000	175	8,406	2,740
Camera & photographic supply	677,000	275	2,462	2,200
Gift, novelty & souvenirs	1,883,000	150	12,553	3,000
Luggage & leather goods	117,000	200	585	2,300
Sewing, needlework & piece goods	736,000	100	7,360	12,400
Pet stores	1,089,000	200	5,445	2,900
Art dealers	265,000	225	1,178	2,000
Optical goods stores	1,104,000	290	3,807	1,500
Pre-Recorded Tapes, Compact Discs	667,000	230	2,900	3,500
Cosmetics, beauty supplies & perfume	524,000	320	1,638	2,000
All other health & personal care	1,088,000	275	3,956	1,650

Table E-1 (continued)

DOWNTOWN FARMINGTON TRADE AREA
RETAIL SALES POTENTIAL AND SUPPORTABLE SPACE, 2030
BY MERCHANDISE CATEGORY

Category	Estimated Sales Potential	Sales Per Sq. Ft.	Supportable Square Feet	Median Store Size
CONVENIENCE GOODS				
Food Stores				
Grocery stores	$ 63,380,000	$ 400	158,450	52,500
Supermarkets	62,153,000	400	155,383	52,500
Convenience food	828,000	300	2,760	2,000
Specialty food stores	1,011,000	200	5,055	2,400
Meat Markets	338,000	225	1,502	2,300
Fish & Seafood Markets	122,000	250	488	2,200
Fruit & Vegetable Markets	214,000	200	1,070	2,000
Other Specialty Food Stores	338,000	225	1,502	2,000
Baked Goods	122,000	250	488	1,800
Confectionery and Nut Stores	92,000	320	288	1,200
All Other Specialty Food Stores	122,000	200	610	2,200
Other Convenience Goods				
Drug & proprietary stores	$ 23,612,000	$ 460	51,330	11,700
Hardware	3,362,000	185	18,173	7,857
Liquor	6,004,000	375	16,011	2,900
Florist	1,635,000	190	8,605	1,600
Food/health supplement stores	545,000	250	2,180	1,500
Food Service & Drinking Places				
Food Service				
Full-service restaurants	$ 25,540,000	$ 360	70,944	4,500
Limited service restaurants	35,000,000	400	87,500	3,400
Cafeterias	0	235	0	10,000
Snack & beverage places	2,096,000	300	6,987	1,500
Ice Cream & Soft Serve	331,000	325	1,018	1,200
Frozen Yogurt	37,000	200	185	1,200
Doughnut Shops	441,000	220	2,005	1,200
Bagel Shops	221,000	275	804	2,150
Coffee Shops	625,000	400	1,563	1,500
Cookie Shops	37,000	400	93	1,200
Other Snack Shops	405,000	360	1,125	2,200
Drinking Places	$ 0	$ 250	0	N/A
Gasoline Svs Stations/Conv.				
Gas/Convenience food stores	$ 72,067,000	$ 1,400	51,476	2,400
Other Gas Stations & Truck Stops	8,227,000	1,000	8,227	2,000
OTHER RETAIL STORES				
Building Materials & Garden Supplies	$ 0	$ 350	0	N/A
Building materials & supplies stores	31,122,000	350	88,920	120,000
Home centers	18,758,000	350	53,594	120,000
Paint, glass & wallpaper	1,408,000	225	6,258	3,750
Other building materials dealers	11,846,000	225	52,649	N/A
Lawn & garden equipment				
Outdoor power equipment	864,000	100	8,640	N/A
Retail nurseries, lawn & garden	3,316,000	100	33,160	15,000
Motor Vehicles & Parts Dealers				
Auto parts, accessories & tires				
Auto parts & accessories stores	$ 4,825,000	$ 200	24,125	6,500
Tire dealers	1,853,000	200	9,265	2,500
Auto Dealers	65,644,000	1,050	62,518	

Source: McComb Group, Ltd.

Table E-2

DOWNTOWN FARMINGTON TRADE AREA
SERVICES SALES POTENTIAL AND SUPPORTABLE SQUARE FEET, 2010
BY SERVICES CATEGORY

Category	Estimated Sales Potential	Sales Per Sq. Ft.	Supportable Square Feet	Median Store Size
Personal Care Services				
Barber shops	$ 38,000	$ 200	190	725
Beauty Shops	1,193,000	190	6,279	1,400
Nail salons	69,000	110	627	1,200
Diet & weight reducing services	107,000	150	713	1,900
Other personal care services	122,000	175	697	1,300
Drycleaning & Laundry Services				
Coin-operated laundries & drycleaners	$ 149,000	$ 60	2,483	2,000
Drycleaning & laundry services (except coin-op.)	331,000	150	2,207	1,600
Other Personal Services				
Photofinishing	$ 304,000	$ 326	933	1,150
Photofinishing Laboratories	245,000	326	752	1,150
One Hour Photo Finishing	59,000	326	181	1,100
Child Day Care Services	1,139,000	N/A	N/A	5,000
Funeral Homes & Funeral Services	320,000	N/A	N/A	N/A
Photographic Services	1,118,000	275	4,065	2,000
Photographic Studios	356,000	275	1,295	1,800
Veteranarian Services	713,000	225	3,169	2,200
Pet Care	107,000	75	1,427	1,200
Rental and Leasing				
Formalwear & costume rental	$ 42,000	$ 365	115	1,200
Video tape and disc rental	388,000	200	1,940	6,000
Recreation				
Bowling Centers	$ 245,000	$ 110	2,227	20,000
Physical fitness facilites	1,193,000	80	14,913	6,500
Golf courses and country clubs	862,000	N/A	0	
Professional Services				
Offices of real estate agents & brokers	$ 3,901,000	$ 300	13,003	2,000
Offices of real estate appraisers	506,000	250	2,024	2,000
Household Goods Repair				
Home & Garden Equipment & Appliance Repair	$ 122,000	$ 175	697	
Reupholstery & furniture repair	86,000	155	555	600
Footwear and leather goods repair	11,000	155	71	750
Watch, clock and jewelry repair	21,000	155	135	900
Garment repair and alteration services	16,000	125	128	825
Automotive Repair and Maintenance				
General automotive repair	$ 1,836,000	$ 200	9,180	
Automotive exhaust system repair	48,000	200	240	
Automotive transmission repair	118,000	200	590	
Carburetor repair shops	128,000	200	640	
Brake, front end & wheel alignment	91,000	200	455	
Electrical repair shops, motor vehicle	16,000	200	80	
Paint or body repair shops	1,305,000	200	6,525	
Automotive glass replacement	399,000	200	1,995	
Automotive oil change & lubrication shops	192,000	200	960	
Carwashes	240,000	200	1,200	

Table E-2 (continued)

DOWNTOWN FARMINGTON TRADE AREA
SERVICES SALES POTENTIAL AND SUPPORTABLE SQUARE FEET, 2010
BY SERVICES CATEGORY

Category	Estimated Sales Potential	Sales Per Sq. Ft.	Supportable Square Feet	Median Store Size
Health Care				
Offices of physicians				
Offices of physicians (except mental health specialists)	$ 5,199,000	$ 285	18,242	1,800
Offices of physicians, mental health specialists	119,000	285	418	1,800
Offices of dentists	1,959,000	285	6,874	1,700
Offices of other health practitioners				
Offices of chiropractors	396,000	250	1,584	1,600
Offices of optometrists	140,000	250	560	1,600
Offices of mental health practitioners (except physicians)	111,000	285	389	1,800
Offices of physical, occup, & speech therapists & audiologists				
Speech therapist & audiologists	21,000	250	84	1,600
Physical & occupational therapists	315,000	250	1,260	1,600
Offices of all other health practitioners				
Offices of podiatrists	34,000	285	119	1,800
Offices of all other misc. health practitioners	192,000	285	674	1,800
Outpatient care centers				
Outpatient mental health & substance abuse centers	184,000	250	736	
Other outpatient care centers				
Kidney dialysis centers	74,000	285	260	
All other outpatient care centers	108,000	285	379	
Home health care services	332,000	285	1,165	

Source: McComb Group, Ltd.

Table E-2 (continued)

DOWNTOWN FARMINGTON TRADE AREA
SERVICES SALES POTENTIAL AND SUPPORTABLE SQUARE FEET, 2015
BY SERVICES CATEGORY

Category		Estimated Sales Potential		Sales Per Sq. Ft.	Supportable Square Feet	Median Store Size
Personal Care Services						
Barber shops	$	51,000	$	200	255	725
Beauty Shops		1,612,000		190	8,484	1,400
Nail salons		94,000		110	855	1,200
Diet & weight reducing services		144,000		150	960	1,900
Other personal care services		166,000		175	949	1,300
Drycleaning & Laundry Services						
Coin-operated laundries & drycleaners	$	201,000	$	60	3,350	2,000
Drycleaning & laundry services (except coin-op.)		446,000		150	2,973	1,600
Other Personal Services						
Photofinishing	$	411,000	$	326	1,261	1,150
Photofinishing Laboratories		332,000		326	1,018	1,150
One Hour Photo Finishing		79,000		326	242	1,100
Child Day Care Services		1,540,000			#DIV/0!	5,000
Funeral Homes & Funeral Services		432,000			#DIV/0!	
Photographic Services		1,512,000		275	5,498	2,000
Photographic Studios		482,000		275	1,753	1,800
Veteranarian Services		965,000		225	4,289	2,200
Pet Care		144,000		75	1,920	1,200
Rental and Leasing						
Formalwear & costume rental	$	58,000	$	365	159	1,200
Video tape and disc rental		526,000		200	2,630	6,000
Recreation						
Bowling Centers	$	332,000	$	110	3,018	20,000
Physical fitness facilites		1,612,000		80	20,150	6,500
Golf courses and country clubs		1,166,000		N/A	0	
Professional Services						
Offices of real estate agents & brokers	$	5,275,000	$	300	17,583	2,000
Offices of real estate appraisers		684,000		250	2,736	2,000
Household Goods Repair						
Home & Garden Equipment & Appliance Repair	$	166,000	$	175	949	
Reupholstery & furniture repair		115,000		155	742	600
Footwear & leather goods repair		14,000		155	90	750
Watch, clock & jewelry repair		29,000		155	187	900
Garment repair & alteration services		21,000		175	120	825
Automotive Repair and Maintenance						
General automotive repair	$	2,484,000	$	200	12,420	
Automotive exhaust system repair		65,000		200	325	
Automotive transmission repair		159,000		200	795	
Carburetor repair shops		173,000		200	865	
Brake, front end & wheel alignment		122,000		200	610	
Electrical repair shops, motor vehicle		21,000		200	105	
Paint or body repair shops		1,764,000		200	8,820	
Automotive glass replacement		540,000		200	2,700	
Automotive oil change & lubrication shops		259,000		200	1,295	
Carwashes		324,000		200	1,620	

Table E-2 (continued)

DOWNTOWN FARMINGTON TRADE AREA
SERVICES SALES POTENTIAL AND SUPPORTABLE SQUARE FEET, 2015
BY SERVICES CATEGORY

Category	Estimated Sales Potential	Sales Per Sq. Ft.	Supportable Square Feet	Median Store Size
Health Care				
Offices of physicians				
Offices of physicians (except mental health specialists)	$ 7,031,000	$ 285	24,670	1,800
Offices of physicians, mental health specialists	161,000	285	565	1,800
Offices of dentists	2,648,000	285	9,291	1,700
Offices of other health practitioners				
Offices of chiropractors	535,000	250	2,140	1,600
Offices of optometrists	191,000	250	764	1,600
Offices of mental health practitioners (except physicians)	149,000	285	523	1,800
Offices of physical, occup, & speech therapists & audiologists				
Speech therapist & audiologists	28,000	250	112	1,600
Physical & occupational therapists	426,000	250	1,704	1,600
Offices of all other health practitioners				
Offices of podiatrists	46,000	285	161	1,800
Offices of all other misc. health practitioners	259,000	285	909	1,800
Outpatient care centers				
Outpatient mental health & substance abuse centers	248,000	250	992	
Other outpatient care centers				
Kidney dialysis centers	101,000	285	354	
All other outpatient care centers	147,000	285	516	
Home health care services	449,000	285	1,575	

Source: McComb Group, Ltd.

Table E-2 (continued)

DOWNTOWN FARMINGTON TRADE AREA
SERVICES SALES POTENTIAL AND SUPPORTABLE SQUARE FEET, 2020
BY SERVICES CATEGORY

Category	Estimated Sales Potential	Sales Per Sq. Ft.	Supportable Square Feet	Median Store Size
Personal Care Services				
Barber shops	$ 68,000	$ 200	340	725
Beauty Shops	2,195,000	190	11,553	1,400
Nail salons	127,000	110	1,155	1,200
Diet & weight reducing services	196,000	150	1,307	1,900
Other personal care services	226,000	175	1,291	1,300
Drycleaning & Laundry Services				
Coin-operated laundries & drycleaners	$ 274,000	$ 60	4,567	2,000
Drycleaning & laundry services (except coin-op.)	607,000	150	4,047	1,600
Other Personal Services				
Photofinishing	$ 559,000	$ 326	1,715	1,150
Photofinishing Laboratories	451,000	326	1,383	1,150
One Hour Photo Finishing	108,000	326	331	1,100
Child Day Care Services	2,096,000		#DIV/0!	5,000
Funeral Homes & Funeral Services	588,000		#DIV/0!	
Photographic Services	2,058,000	275	7,484	2,000
Photographic Studios	656,000	275	2,385	1,800
Veteranarian Services	1,313,000	225	5,836	2,200
Pet Care	196,000	75	2,613	1,200
Rental and Leasing				
Formalwear & costume rental	$ 79,000	$ 365	216	1,200
Video tape and disc rental	715,000	200	3,575	6,000
Recreation				
Bowling Centers	$ 451,000	$ 110	4,100	20,000
Physical fitness facilites	2,195,000	80	27,438	6,500
Golf courses and country clubs	1,587,000	N/A	0	
Professional Services				
Offices of real estate agents & brokers	$ 7,181,000	$ 300	23,937	2,000
Offices of real estate appraisers	931,000	250	3,724	2,000
Household Goods Repair				
Home & Garden Equipment & Appliance Repair	$ 226,000	$ 175	1,291	
Reupholstery & furniture repair	156,000	155	1,006	600
Footwear & leather goods repair	20,000	155	129	750
Watch, clock & jewelry repair	39,000	155	252	900
Garment repair & alteration services	29,000	175	166	825
Automotive Repair and Maintenance				
General automotive repair	$ 3,380,000	$ 200	16,900	
Automotive exhaust system repair	88,000	200	440	
Automotive transmission repair	215,000	200	1,075	
Carburetor repair shops	235,000	200	1,175	
Brake, front end & wheel alignment	167,000	200	835	
Electrical repair shops, motor vehicle	29,000	200	145	
Paint or body repair shops	2,400,000	200	12,000	
Automotive glass replacement	735,000	200	3,675	
Automotive oil change & lubrication shops	353,000	200	1,765	
Carwashes	441,000	200	2,205	

Table E-2 (continued)

DOWNTOWN FARMINGTON TRADE AREA
SERVICES SALES POTENTIAL AND SUPPORTABLE SQUARE FEET, 2020
BY SERVICES CATEGORY

Category	Estimated Sales Potential	Sales Per Sq. Ft.	Supportable Square Feet	Median Store Size
Health Care				
Offices of physicians				
Offices of physicians (except mental health specialists)	$ 9,571,000	$ 285	33,582	1,800
Offices of physicians, mental health specialists	220,000	285	772	1,800
Offices of dentists	3,606,000	285	12,653	1,700
Offices of other health practitioners				
Offices of chiropractors	729,000	250	2,916	1,600
Offices of optometrists	259,000	250	1,036	1,600
Offices of mental health practitioners (except physicians)	204,000	285	716	1,800
Offices of physical, occup, & speech therapists & audiologists				
Speech therapist & audiologists	39,000	250	156	1,600
Physical & occupational therapists	580,000	250	2,320	1,600
Offices of all other health practitioners				
Offices of podiatrists	62,000	285	218	1,800
Offices of all other misc. health practitioners	353,000	285	1,239	1,800
Outpatient care centers				
Outpatient mental health & substance abuse centers	338,000	250	1,352	
Other outpatient care centers				
Kidney dialysis centers	138,000	285	484	
All other outpatient care centers	200,000	285	702	
Home health care services	612,000	285	2,147	

Source: McComb Group, Ltd.

Table E-2 (continued)

DOWNTOWN FARMINGTON TRADE AREA
SERVICES SALES POTENTIAL AND SUPPORTABLE SQUARE FEET, 2025
BY SERVICES CATEGORY

Category	Estimated Sales Potential	Sales Per Sq. Ft.	Supportable Square Feet	Median Store Size
Personal Care Services				
Barber shops	$ 93,000	$ 200	465	725
Beauty Shops	2,987,000	190	15,721	1,400
Nail salons	173,000	110	1,573	1,200
Diet & weight reducing services	267,000	150	1,780	1,900
Other personal care services	307,000	175	1,754	1,300
Drycleaning & Laundry Services				
Coin-operated laundries & drycleaners	$ 374,000	$ 60	6,233	2,000
Drycleaning & laundry services (except coin-op.)	827,000	150	5,513	1,600
Other Personal Services				
Photofinishing	$ 760,000	$ 326	2,331	1,150
Photofinishing Laboratories	614,000	326	1,883	1,150
One Hour Photo Finishing	147,000	326	451	1,100
Child Day Care Services	2,854,000		#DIV/0!	5,000
Funeral Homes & Funeral Services	800,000	N/A	#VALUE!	N/A
Photographic Services	2,801,000	275	10,185	1,500
Photographic Studios	894,000	275	3,251	1,500
Veteranarian Services	1,787,000	225	7,942	1,500
Pet Care	267,000	75	3,560	1,500
Rental and Leasing				
Formalwear & costume rental	$ 107,000	$ 365	293	1,200
Video tape and disc rental	974,000	200	4,870	6,000
Recreation				
Bowling Centers	$ 614,000	$ 110	5,582	20,000
Physical fitness facilites	2,987,000	80	37,338	6,500
Golf courses and country clubs	2,161,000	N/A	0	
Professional Services				
Offices of real estate agents & brokers	$ 9,775,000	$ 300	32,583	2,000
Offices of real estate appraisers	1,267,000	250	5,068	2,000
Household Goods Repair				
Home & Garden Equipment & Appliance Repair	$ 307,000	$ 175	1,754	
Reupholstery & furniture repair	214,000	155	1,381	600
Footwear & leather goods repair	27,000	155	174	750
Watch, clock & jewelry repair	53,000	155	342	900
Garment repair & alteration services	40,000	175	229	825
Automotive Repair and Maintenance				
General automotive repair	$ 4,601,000	$ 200	23,005	
Automotive exhaust system repair	120,000	200	600	
Automotive transmission repair	294,000	200	1,470	
Carburetor repair shops	320,000	200	1,600	
Brake, front end & wheel alignment	227,000	200	1,135	
Electrical repair shops, motor vehicle	40,000	200	200	
Paint or body repair shops	3,267,000	200	16,335	
Automotive glass replacement	1,000,000	200	5,000	
Automotive oil change & lubrication shops	480,000	200	2,400	
Carwashes	600,000	200	3,000	

Table E-2 (continued)

DOWNTOWN FARMINGTON TRADE AREA
SERVICES SALES POTENTIAL AND SUPPORTABLE SQUARE FEET, 2025
BY SERVICES CATEGORY

Category	Estimated Sales Potential	Sales Per Sq. Ft.	Supportable Square Feet	Median Store Size
Health Care				
Offices of physicians				
Offices of physicians (except mental health specialists)	$ 13,027,000	$ 285	45,709	1,800
Offices of physicians, mental health specialists	299,000	285	1,049	1,800
Offices of dentists	4,908,000	285	17,221	1,700
Offices of other health practitioners				
Offices of chiropractors	992,000	250	3,968	1,600
Offices of optometrists	352,000	250	1,408	1,600
Offices of mental health practitioners (except physicians)	278,000	285	975	1,800
Offices of physical, occup, & speech therapists & audiologists				
Speech therapist & audiologists	53,000	250	212	1,600
Physical & occupational therapists	789,000	250	3,156	1,600
Offices of all other health practitioners				
Offices of podiatrists	86,000	285	302	1,800
Offices of all other misc. health practitioners	480,000	285	1,684	1,800
Outpatient care centers				
Outpatient mental health & substance abuse centers	459,000	250	1,836	
Other outpatient care centers				
Kidney dialysis centers	187,000	285	656	
All other outpatient care centers	272,000	285	954	
Home health care services	832,000	285	2,919	

Source: McComb Group, Ltd.

Table E-2 (continued)

DOWNTOWN FARMINGTON TRADE AREA
SERVICES SALES POTENTIAL AND SUPPORTABLE SQUARE FEET, 2030
BY SERVICES CATEGORY

Category	Estimated Sales Potential	Sales Per Sq. Ft.	Supportable Square Feet	Median Store Size
Personal Care Services				
Barber shops	$ 127,000	$ 200	635	725
Beauty Shops	4,067,000	190	21,405	1,400
Nail salons	236,000	110	2,145	1,200
Diet & weight reducing services	364,000	150	2,427	1,900
Other personal care services	418,000	175	2,389	1,300
Drycleaning & Laundry Services				
Coin-operated laundries & drycleaners	$ 508,000	$ 60	8,467	2,000
Drycleaning & laundry services (except coin-op.)	1,126,000	150	7,507	1,600
Other Personal Services				
Photofinishing	$ 1,035,000	$ 326	3,175	1,150
Photofinishing Laboratories	835,000	326	2,561	1,150
One Hour Photo Finishing	200,000	326	613	1,100
Child Day Care Services	3,885,000		#DIV/0!	5,000
Funeral Homes & Funeral Services	1,089,000	N/A	#VALUE!	N/A
Photographic Services	3,813,000	275	13,865	1,500
Photographic Studios	1,216,000	275	4,422	1,500
Veteranarian Services	2,433,000	225	10,813	1,500
Pet Care	364,000	75	4,853	1,500
Rental and Leasing				
Formalwear & costume rental	$ 146,000	$ 365	400	1,200
Video tape and disc rental	1,326,000	200	6,630	6,000
Recreation				
Bowling Centers	$ 835,000	$ 110	7,591	20,000
Physical fitness facilites	4,067,000	80	50,838	6,500
Golf courses and country clubs	2,941,000	N/A	0	
Professional Services				
Offices of real estate agents & brokers	$ 13,307,000	$ 300	44,357	2,000
Offices of real estate appraisers	1,725,000	250	6,900	2,000
Household Goods Repair				
Home & Garden Equipment & Appliance Repair	$ 418,000	$ 175	2,389	
Reupholstery & furniture repair	291,000	155	1,877	600
Footwear & leather goods repair	36,000	155	232	750
Watch, clock & jewelry repair	73,000	155	471	900
Garment repair & alteration services	54,000	175	309	825
Automotive Repair and Maintenance				
General automotive repair	$ 6,264,000	$ 200	31,320	
Automotive exhaust system repair	164,000	200	820	
Automotive transmission repair	400,000	200	2,000	
Carburetor repair shops	435,000	200	2,175	
Brake, front end & wheel alignment	308,000	200	1,540	
Electrical repair shops, motor vehicle	54,000	200	270	
Paint or body repair shops	4,448,000	200	22,240	
Automotive glass replacement	1,361,000	200	6,805	
Automotive oil change & lubrication shops	654,000	200	3,270	
Carwashes	818,000	200	4,090	

Table E-2 (continued)

DOWNTOWN FARMINGTON TRADE AREA
SERVICES SALES POTENTIAL AND SUPPORTABLE SQUARE FEET, 2030
BY SERVICES CATEGORY

Category	Estimated Sales Potential	Sales Per Sq. Ft.	Supportable Square Feet	Median Store Size
Health Care				
Offices of physicians				
Offices of physicians (except mental health specialists)	$ 17,733,000	$ 285	62,221	1,800
Offices of physicians, mental health specialists	407,000	285	1,428	1,800
Offices of dentists	6,681,000	285	23,442	1,700
Offices of other health practitioners				
Offices of chiropractors	1,351,000	250	5,404	1,600
Offices of optometrists	479,000	250	1,916	1,600
Offices of mental health practitioners (except physicians)	378,000	285	1,326	1,800
Offices of physical, occup, & speech therapists & audiologists				
Speech therapist & audiologists	73,000	250	292	1,600
Physical & occupational therapists	1,075,000	250	4,300	1,600
Offices of all other health practitioners				
Offices of podiatrists	116,000	285	407	1,800
Offices of all other misc. health practitioners	654,000	285	2,295	1,800
Outpatient care centers				
Outpatient mental health & substance abuse centers	625,000	250	2,500	
Other outpatient care centers				
Kidney dialysis centers	254,000	285	891	
All other outpatient care centers	371,000	285	1,302	
Home health care services	1,133,000	285	3,975	

Source: McComb Group, Ltd.