

# STRATEGIC ECONOMIC DEVELOPMENT PLAN

## January 2012-December 2014



Prepared for:

City of Ormond Beach  
Department of Economic Development

Prepared by:



Strategic Planning Group, Inc.  
830-13 A1A, North Suite 402  
Ponte Vedra Beach, FL 32082  
1-800-213-PLAN — 904-339-0150  
[www.spginc.org](http://www.spginc.org)

**RESOLUTION NO. 2011-202**

A RESOLUTION OF THE CITY OF ORMOND BEACH  
ENDORISING THE CITY'S 2012-2014 STRATEGIC  
ECONOMIC DEVELOPMENT PLAN (SEDP); AND SETTING  
FORTH AN EFFECTIVE DATE

**WHEREAS**, the City's Economic Development Department prepared the 2006-2011 Strategic Economic Development Plan ("the Plan") that was unanimously endorsed by the City Commission, and

**WHEREAS**, the Plan was used as a guide by the City in implementing a comprehensive program of economic development for the past five years, and

**WHEREAS**, Strategic Planning Group, Inc., (SPG) was retained to assist staff in updating the City's Plan, and

**WHEREAS**, the City Commission was presented a draft 2011-2014 Strategic Economic Development Plan ("the SEDP") during a Commission workshop held on October 18, 2011, and

**WHEREAS**, the final SEDP reflects the Commissioners comments and recommendations as discussed during the workshop, and

**WHEREAS**, the SEDP has been developed to serve the City officials, residents, local businesses, and real estate investors as a guide to a tool in shaping the community's future financial viability, now therefore,

**BE IT RESOLVED BY THE CITY COMMISSION OF THE CITY OF  
ORMOND BEACH, FLORIDA, THAT:**

**SECTION ONE.** The City of Ormond Beach endorses the attached January 2012 - December 31, 2014 Strategic Economic Development Plan outlining the goals, objectives and action steps required to achieve the community's economic goals.

**SECTION TWO.** This Resolution shall take effect immediately upon its adoption.

**APPROVED AND AUTHENTICATED** this 13th day of December, 2011.



**ED KELLEY**

Mayor



**ATTEST:**



**JOSHUA FRUECHT**  
City Clerk

# Table of Contents

ACKNOWLEDGMENTS .....	1
<b>I. EXECUTIVE SUMMARY .....</b>	<b>2</b>
A. STRATEGIC ECONOMIC DEVELOPMENT PLAN .....	3
1. <i>Macro-Goals</i> .....	3
2. <i>Plan Summary</i> .....	3
3. <i>Goals and Objectives</i> .....	3
<b>II. INTRODUCTION .....</b>	<b>5</b>
A. WHY DO ECONOMIC DEVELOPMENT? .....	5
B. WHAT IS A STRATEGIC ECONOMIC DEVELOPMENT PLAN? .....	6
<b>III. CITY OF ORMOND BEACH ECONOMIC/DEMOGRAPHIC PROFILE .....</b>	<b>7</b>
A. LOCATION .....	7
B. POPULATION CHARACTERISTICS .....	8
1. <i>Population/Demographics Summary</i> .....	11
C. LABOR AND EMPLOYMENT .....	12
D. COMMUTING PATTERNS .....	14
E. TAX MILLAGE RATES .....	15
F. VOLUSIA COUNTY LOCATION QUOTIENTS AND TARGET INDUSTRIES .....	17
1. <i>Volusia County Location Quotients</i> .....	17
G. TARGET INDUSTRIES .....	20
H. HOSPITALITY SECTOR .....	21
I. RETAIL SECTOR .....	21
J. ECONOMY SUMMARY .....	26
<b>IV. PROGRESS REVIEW OF THE 2006-2011 SEDP .....</b>	<b>27</b>
A. PROGRESS REVIEW .....	27
B. SUMMARY OF ACCOMPLISHMENTS .....	28
C. DOWNTOWN ORMOND BEACH .....	28
<b>V. PREPARING THE STRATEGIC ECONOMIC DEVELOPMENT PLAN .....</b>	<b>30</b>
A. THE OLD PLAN .....	30
B. MACRO-GOALS: .....	30
C. THE NEW STRATEGIC ECONOMIC DEVELOPMENT PLAN .....	30
1. <i>Mission Statement</i> : .....	31
2. <i>Macro Goals</i> : .....	31
3. <i>Ormond Beach Strengths and Weaknesses</i> .....	31
4. <i>Objectives</i> .....	32
<b>VI. THE STRATEGIC ECONOMIC DEVELOPMENT PLAN .....</b>	<b>34</b>
A. RETENTION/EXPANSION .....	34
B. RECRUITMENT .....	35
C. DOWNTOWN TOWN, HOSPITALITY, RETAIL .....	37
<b>VII. STRATEGIC PLAN CONCLUSION .....</b>	<b>38</b>
<b>VIII. APPENDICES .....</b>	<b>39</b>
A. APPENDIX. 2007-2009 CENSUS DATA (AMERICAN COMMUNITY SURVEY) .....	40
B. APPENDIX. 2005-2009 CENSUS DATA (AMERICAN COMMUNITY SURVEY) .....	43
C. APPENDIX. CLARITAS DOWNTOWN (CRA) SOCIO ECONOMICS .....	46
D. APPENDIX. RETAIL GAP ANALYSIS – 3 MILE RADIUS .....	51

## Acknowledgments

The consultant team and the City of Ormond Beach's Economic Development Department extend special thanks to the individuals who participated in the Strategic Economic Development Workshop held on September 17, 2011. The workshop participants included the following individuals:

Pat Behnke  
Bob Behnke  
Larry Curran  
Jayne Fifer\*

Scott Ford  
Andrea Hall  
Ryck Hundredmark  
Bardia Khajenoori  
Vince Kinsler  
Chris Lambert  
Joe Lipscomb\*  
Juan Loebel\*  
Shannon Julien

Alan Jorczak\*  
Paul Mitchell  
Martin Press\*  
Rita Press\*  
Damien Richards  
Bob Selover\*  
Dr. Phillip Shapiro\*  
Michelle Slimak  
Kris Stockhammer  
Kerry Symolon  
Erlene Turner  
Garry Vance  
Wayne Vanorden

### **City Staff**

Joyce Shanahan  
Steven Lichliter  
Joe Mannarino\*

### **Consultants-SPG**

Robert Gray, AICP\*  
Mary Jane Stanley, CEcD

\*Participated in the crafting of original 2006 Plan

## **I. EXECUTIVE SUMMARY**

Strategic Planning Group, Inc., (SPG) was retained by the City of Ormond Beach to update the City's 2006-2011 Strategic Economic Development Plan (SEDP). The work was undertaken in conjunction with the City's Economic Development Department, which will ultimately be responsible for managing and implementing the plan.

As a part of the work program, SPG developed economic and demographic data on the City of Ormond Beach, Volusia County, and selected other cities and counties in the regional area, for comparative purposes. This work effort was designed to establish a comparative overview of the City. In addition, a focus group workshop session was conducted on September 17, 2011, to obtain input on community issues, goals, and objectives for the new three year plan. This Plan is effective January 1, 2012 through December 31, 2014. This effort resulted in a general consensus, refinement, and prioritization of objectives. This report is organized into seven sections:

**Section I** presents the Executive Summary.

**Section II** provides an overview of the economic development process including a Strategic Economic Development Plan.

**Section III** provides a demographic and economic profile of the City of Ormond Beach.

**Section IV** is a progress review of the 2006-2011 Strategic Economic Development Plan.

**Section V** concludes a summary of the stated objectives and related action steps within a time frame for accomplishment.

**Section VI** provides the Strategic Three-Year Economic Development Program conclusions.

**Section VII** provides the Technical Appendices which includes additional back ground information Tables used in the preparation of the Tables within the Strategic Economic Development Plan.

## **A. Strategic Economic Development Plan**

The mission of the Strategic Economic Development Plan is to influence the existing and future landscape of Ormond Beach by being proactive in business retention, expansion, and attraction. The summary of the plan is as follows:

### **1. Macro-Goals**

- Expand the Ormond Beach non-residential tax base and other revenue sources.
- Provide for a variety of employment opportunities in Ormond Beach.
- Maintain and increase financial wealth of Ormond Beach residents.
- Ensure quality commercial and industrial development.
- Participate and coordinate with regional economic development efforts.

### **2. Plan Summary**

The Three-Year Strategic Economic Development Plan (SEDP) has been developed to serve the City of Ormond Beach as a guide to identifying key priorities in diversifying the City's economy. The SEDP also identifies key challenges, ensures stakeholder consensus, and formulates recommendations for the implementation of the SEDP.

The goals, objectives, and policies of the SEDP are designed in the three main areas of economic development: business retention and expansion; business recruitment; and downtown development, retail development, and visitor attraction.

The SEDP is a document that City officials, residents, local businesses, and real estate investors should view as a tool in shaping the community's future financial viability.

### **3. Goals and Objectives**

#### **Retention and Expansion**

- OBJ. 1.1 Foster a healthy business environment
- OBJ. 1.2 Assist businesses in hiring/training skilled labor force
- OBJ. 1.3 Assist businesses to access capital/financial incentive programs
- OBJ. 1.4 Assist commercial/industrial business expansion
- OBJ. 1.5 Assist property owner in reuse opportunities for the former Florida Memorial Hospital properties
- OBJ. 1.6 Evaluate existing business regulations for simplicity and efficiency
- OBJ. 1.7 Identify additional economic opportunity areas

**Recruitment**

- OBJ. 2.1 Ensure sufficient properties available for business expansion
- OBJ. 2.2 Create regional commerce park (Ormond Crossings) and prepare a development plan for the southwest quadrant of the Airport
- OBJ. 2.3 Coordinate marketing strategies to attract industry
- OBJ. 2.4 Provide/identify businesses access to financial incentive programs
- OBJ. 2.5 Launch a marketing program to "brand the City"
- OBJ. 2.6 Attract new industries to the Ormond Beach Airport
- OBJ. 2.7 Identify/recruit "green"/sustainable energy industry
- OBJ. 2.8 Promote green industries and standards
- OBJ. 2.9 Analyze our competitiveness (incentives etc.)
- OBJ. 2.10 Partner with Embry Riddle Aeronautical University for additional facilities to support expansion of new tech park
- OBJ. 2.11 Develop active marketing program for the motorcycle industries

**Downtown, Visitation, Retail**

- OBJ. 3.1 Update current CRA Downtown Master Plan
- OBJ. 3.2 Provide financial assistance to Downtown businesses
- OBJ. 3.3 Promote visitor attractions to the Downtown
- OBJ. 3.4 Market the Main Street and Visitor Attractions
- OBJ. 3.5 Develop an Arts District
- OBJ. 3.6 Implement the Granada Opportunity Zone

A detail listing of the individual 57 action steps are found starting on page 34.

## **II. INTRODUCTION**

According to the Florida Economic Development Council (FEDC), economic development is:

*“The process of improving the economic health of a city, region or the state by bringing together its assets, resources and political action into a strategy to bring wealth and prosperity to that area.”*

Economic development is fundamentally about enhancing the factors of productive capacity – land, labor, capital, and technology – of a national, state, or local economy. By using its resources and powers to reduce the risks and costs which could prohibit investment, the public sector often has been responsible for setting the stage for employment-generating investment by the private sector.

The public sector generally seeks to increase incomes, the number of jobs, and the productivity of resources in regions, states, counties, cities, towns, and neighborhoods. Its tools and strategies have often been effective in enhancing a community’s:

- labor force (workforce preparation, accessibility, cost);
- infrastructure (accessibility, capacity, and service of basic utilities, as well as transportation and telecommunications);
- business and community facilities (access, capacity, and service to business incubators, industrial/technology/science parks);
- schools/community colleges/universities, sports/tourist facilities;
- environment (physical, psychological, cultural, and entrepreneurial);
- economic structure (composition); and
- institutional capacity (leadership, knowledge, skills) to support economic development and growth.

However, there can be trade-offs between economic development’s goals of job creation and wealth generation. Increasing productivity, for instance, may eliminate some types of jobs in the short-run.

### **A. Why do Economic Development?**

According to FEDC, the public sector is involved in economic development to:

- increase wealth and prosperity for the state, communities, and citizens;
- ensure job opportunities for all of Florida’s citizens;
- expand the tax base for local and state government to better serve the citizens;

- improve the quality of life of Florida's citizens by increasing the standard of living; and
- ensure a bright economic future for the state.

As noted by the FEDC, wealth generation occurs when products and services are exported outside of jurisdictional boundaries and money is imported in return. When companies have wages above the local or state average, the standard of living is raised. Local retail and service jobs, although needed, circulate money within the community but do not create wealth for the immediate area unless serving visitors to Ormond Beach/Volusia County.

Without an economic development program, the community would grow but not always in the way desired. Without a proactive approach to economic development, growth may result in the City having lower waged, service-oriented jobs and a lower standard of living. By targeting and attracting firms that produce high-wage, high-value jobs, which are competed for with other communities, prosperity is increased and the standard of living in Ormond Beach and Volusia County is raised. The Strategic Economic Development Plan will outline the goals, objectives and action steps required to achieve the community's goals.

By encouraging high levels of capital investment along with high-wage jobs, the tax base is expanded, thereby providing more dollars for local and state governments to provide high-quality services. This new tax base will continue to provide a strong return, especially at the local level, for many decades.

## **B. What is a Strategic Economic Development Plan?**

Strategic Planning is a visionary process of what an organization, place or group wants to be, at some determined point in time. Strategy is the framework that guides those decisions that determine the nature and direction of the process. Strategic planning is the development of that framework. The following are definitions used in this Plan to define the elements of strategic planning: goal, objective, strategy, and action steps.

There are several steps in preparing a Strategic Economic Development Plan. The Economic Development Administration (EDA) basically defines the strategic planning process in four parts:

- analysis, where we are;
- vision, where we want to be;
- action plan, how do we get there;
- evaluation, how are we doing.

The first step, where the City of Ormond Beach is, geographically and economically, is outlined in the next section of this document.

### III. CITY OF ORMOND BEACH ECONOMIC/DEMOGRAPHIC PROFILE

#### A. Location

The City of Ormond Beach is located near the very crossroads of Central Florida's High Tech Corridor, I-95 and I-4, and has become known as Central Florida's preferred business address. The City is almost equidistant to Jacksonville, Orlando and Merritt Island, as shown in Figure 1.

Figure 1. Location Ormond Beach



Source: Strategic Planning Group, Inc., 2011

When the 2006-2011 SEDP was prepared, the City of Ormond Beach and Volusia County were part of a two county "Consolidated Statistical Area (Deltona, Palm Coast CSA)". The US Government has changed the definition of a CSA, which is now referred to as a "Combined Statistical Area", and the City of Ormond Beach and Volusia County are now part of the seven county "Orlando, Deltona, and Daytona Beach CSA". This new designation shows that Volusia County has a strong economic linkage to the metro Orlando market.

**Figure 2 Orlando-Deltona-Daytona Beach CSA**



Source: Strategic Planning Group, Inc. 2011

## B. Population Characteristics

The Daytona Beach CSA contained approximately 554,000 residents in 2004, representing a 39% growth rate since 1990, as shown in Table 1. In terms of growth rate, Flagler County has shown significant growth over the last 14 years (143%). Ormond Beach, which as of 2004 had basically reached build-out, grew only by 31%.

**Table 1. Daytona Beach CSA Growth 1990-2004**

	1990	2000	2004	2010	2000-2010 Change	Percent Change
Daytona Beach CSA *	399,438	493,175	553,944	2,818,120	154,506	38.7%
Volusia County	370,737	443,343	484,261	494,593	10,332	2.3%
Flagler County	28,701	49,832	69,683	95,696	45,864	92.0%
Ormond Beach	29,721	36,301	39,009	38,137	1,836	5.1%

*Note major change in definition of CSA*

Source: 1990, 2000 and 2010 Census of Population, U.S. Department of Commerce, 2004 Estimates - BEBR University of Florida and Strategic Planning Group, Inc., 2011

Ormond Beach was the fourth largest city in Volusia County as shown in Table 2. It is of interest to note that the western part of the County appears to be growing faster than the eastern part; as well as the fact that the City of Daytona Beach experienced a negative growth or a loss of population between 2000 and 2010.

**Table 2. Volusia County Municipal Populations**

	2000	2004	2010	Amount Change	Percent Change
Deltona	69,543	80,052	85,182	15,639	22.5%
Daytona Beach	64,112	65,077	61,005	-3,107	-4.8%
Port Orange	45,823	53,217	56,048	10,225	22.3%
Ormond Beach	36,301	39,009	38,137	1,836	5.1%
Deland	20,904	23,829	27,031	6,127	29.3%
New Smyrna Beach	20,048	21,334	22,464	2,416	12.1%
Edgewater	18,668	20,637	20,750	2,082	11.2%
DeBary	15,559	17,856	19,310	3,751	24.1%
South Daytona	13,177	13,945	12,252	-925	-7.0%
Holly Hill	12,119	12,612	11,659	-460	-3.8%
Unincorporated Area	106,880	113,678	116,655	9,775	9.1%

Note: Includes municipalities with populations over 10,000 persons.

Source: 1990, 2000 and 2010 Census of Population, U.S. Department of Commerce, 2004 Estimates - BEBR University of Florida and Strategic Planning Group, Inc., 2011

Due to the fact that Ormond Beach is virtually built-out, the City's relative population ranking among Florida cities declined from 56<sup>th</sup> in 2000 to 66<sup>th</sup> in 2010. Deltona, which has experienced growth, increased in ranking from 27<sup>th</sup> in 2000 to 24<sup>th</sup> in 2010. Palm Coast had the most significant growth in the region, increasing from 62<sup>nd</sup> in 2000 to 30<sup>th</sup> largest city in Florida in 2010.

**Table 3. Comparative City Rankings 2000-2010**

Florida Rank	2000	2010
Ormond Beach	56	66
Deltona	27	24
Daytona Beach	30	36
Port Orange	44	45
Palm Coast	62	30

Source: BEBR; Strategic Planning Group, Inc. 2011

Table 4 shows the socio-economic comparison of Ormond Beach to other surrounding areas as well as to the State as a whole. Ormond Beach has a higher median age reflecting its large retirement population, and its mean income of \$84,000 is significantly higher than the comparative cities and the State. The residents of Ormond Beach are highly educated with approximately 94% having a high school or higher education of which 32% have a higher educational attainment.

**Table 4. Comparative Socio-Economic Profile – 2009**

	Ormond Beach	Port Orange	Daytona Beach	Deltona	Palm Coast	Florida
Median Age	48.7	45.6	36.6	35.9	44.3	39.7
Household with children 18 yrs or less	21.3%	23.8%	17.3%	38.3%	27.9%	30.1%
Households with some one 65 yrs plus	42.0%	35.5%	31.2%	23.1%	38.4%	29.8%
Median Income	\$62,243	\$45,276	\$30,394	\$49,201	\$47,277	\$47,450
Mean Income	\$84,091	\$61,482	\$42,265	\$55,154	\$56,395	\$65,961
High School and over	93.7%	88.3%	84.2%	84.2%	91.8%	84.9%
Higher Education	32.0%	21.0%	21.2%	13.3%	20.7%	25.6%
Bachelors Degree	21.0%	14.0%	13.7%	9.8%	14.7%	16.6%
Graduate/Professional Degree	11.0%	6.9%	7.5%	3.5%	6.0%	9.0%

Source: American Community Survey, 2005-9 trends, 2011; Strategic Planning Group, Inc.

As briefly mentioned earlier, Ormond Beach's resident population has a large number of retirees representing over 27% of the population (over the age of 64), as shown in Table 5.

**Table 5. City of Ormond Beach Resident Age Characteristics – 2010**

Age	Number			Percent			Males per 100 females
	Both	Male	Female	Both	Male	Female	
Total population	38,137	17,985	20,152	100.0	100.0	100.0	89.2
Under 5 years	1,414	722	692	3.7	4.0	3.4	104.3
5 to 9 years	1,653	859	794	4.3	4.8	3.9	108.2
10 to 14 years	2,105	1,024	1,081	5.5	5.7	5.4	94.7
15 to 19 years	2,188	1,133	1,055	5.7	6.3	5.2	107.4
20 to 24 years	1,489	788	701	3.9	4.4	3.5	112.4
25 to 29 years	1,354	668	686	3.6	3.7	3.4	97.4
30 to 34 years	1,475	725	750	3.9	4.0	3.7	96.7
35 to 39 years	1,749	847	902	4.6	4.7	4.5	93.9
40 to 44 years	2,321	1,096	1,225	6.1	6.1	6.1	89.5
45 to 49 years	2,898	1,399	1,499	7.6	7.8	7.4	93.3
50 to 54 years	3,067	1,434	1,633	8.0	8.0	8.1	87.8
55 to 59 years	2,966	1,377	1,589	7.8	7.7	7.9	86.7
60 to 64 years	3,073	1,454	1,619	8.1	8.1	8.0	89.8
65 to 69 years	2,687	1,221	1,466	7.0	6.8	7.3	83.3
70 to 74 years	2,246	1,010	1,236	5.9	5.6	6.1	81.7
75 to 79 years	1,968	886	1,082	5.2	4.9	5.4	81.9
80 to 84 years	1,785	743	1,042	4.7	4.1	5.2	71.3
85 to 89 years	1,138	441	697	3.0	2.5	3.5	63.3
90 years and over	561	158	403	1.5	0.9	2.0	39.2
Under 18 years	6,563	3,325	3,238	17.2	18.5	16.1	102.7
18 to 64 years	21,189	10,201	10,988	55.6	56.7	54.5	92.8

Source: US Department of Commerce, Census Department, 2011, Strategic Planning Group, Inc.

As mentioned earlier, Ormond Beach residents are highly educated with 23% having some college education, 19% with a bachelor's degree, and 13% with graduate degrees as shown in Table 6.

**Table 6. Ormond Beach Resident Educational Attainment, 2009**

Selected Social Characteristics in the United States	Estimate	Margin of Error (+/-)	Percent	Margin of Error (+/-)
<b>EDUCATIONAL ATTAINMENT</b>				
<b>Population 25 years and over</b>	<b>29,262</b>	<b>512</b>	<b>29,262</b>	<b>(X)</b>
Less than 9th grade	545	175	1.9%	0.6
9th to 12th grade, no diploma	1,974	331	6.7%	1.1
High school graduate (includes equivalency)	8,112	560	27.7%	1.8
Some college, no degree	6,697	544	22.9%	1.8
Associate's degree	2,746	364	9.4%	1.2
Bachelor's degree	5,467	587	18.7%	2
Graduate or professional degree	3,721	367	12.7%	1.3

Source: American Community Survey, 2005-9 trends, 2011; Strategic Planning Group, Inc.

The City has excellent K-12 schools as shown in Table 7.

**Table 7. Ormond Beach School Ratings**

School Grades	2011	2010	
<b>High School</b>			
Seabreeze	n/a	B	1.
<b>Middle School</b>			2.
David Hinson	A	A	
Ormond Middle	A	A	3.
<b>Elementary School</b>			4.
Ormond Beach	A	B	
Pine Trail	A	A	
Tomoka	A	A	5.
Pathway	C	A	

Source: <http://schoolgrades.floe.org> 2011, Strategic Planning Group, Inc.

## 1. Population/Demographics Summary

- The City's estimated 2010 population was 38,137 persons, an increase of 1,836 persons or a 5.1% increase over the 2000 Census but less than the 2004 estimated population referenced in the 2006-11 SEDP.
- Ormond Beach is the fourth largest municipality in Volusia County and the seventh fastest growing in terms of population percentage increase from 2000-2010.

- The City's population is relatively older than that of the surrounding region, with the average age being 48.7 years as of the 2010 Census.
- The City's population is more highly educated than that of other metropolitan areas in the vicinity.
- 2010 Census information on ethnicity indicated a relatively homogeneous population with 93% being white, 3 % Asian and 2% Black. The Hispanic population is slightly over 2%.
- The City has relatively high mean household income which was estimated at \$84,000 reflecting the highly skilled occupational and retiree profile of the community.

### C. Labor and Employment

According to national statistics, Florida has experienced some of the worst impacts of the residential bust and subsequent recession. It continues to have high unemployment rates compared to national figures as shown in Tables 8 and 9.

**Table 8. Volusia County Civilian Workforce – 2011 versus 2010**

	Civilian Workforce			
	2nd qtr'10	2nd qtr'11	Net Change	% net change
Volusia County	253,419	253,449	30	0.0
Florida	9,214,333	9,241,000	26,667	0.3
U.S	154,181,333	153,628,333	-553,000	-0.4

Source: Volusia County Economic Development Department; Strategic Planning Group, Inc. 2011

**Table 9. Volusia County Unemployment – 2<sup>nd</sup> Quarter 2011**

	% Unemployed		
	April'11	May'11	June'11
Volusia County	10.6%	10.5%	0.1%
Florida	10.4%	10.5%	11.1%
U.S	8.7%	8.7%	9.3%

Source: Volusia County Economic Development Department; Strategic Planning Group, Inc. 2011

The County's top three employment sectors are: (1) Education and Health Services, (2) Leisure and Hospitality and (3) retail trade, as shown in Table 10.

**Table 10. Volusia County Employment by Major Industry, 2011**

Industry Sector	2 qtr'11	Avg 2010	Net Change	% Change
Construction	7,200	7,867	-667	-8.5%
Manufacturing	7,400	7,400	0	0.0%
Wholesale trade	4,700	4,800	-100	-2.1%
retail trade	23,633	23,367	266	1.1%
Transportation, warehousing, utilities	1,900	1,900	0	0.0%
Information	1,900	2,067	-167	-8.1%
Financial activities	7,000	7,100	-100	-1.4%
Professional and business services	16,600	17,033	-433	-2.5%
Education and health services	32,033	31,400	633	2.0%
Leisure and hospitality	24,033	22,033	2,000	9.1%
Other services	8,367	8,433	-66	-0.8%
Federal government	1,300	1,867	-567	-30.4%
State government	3,100	3,200	-100	-3.1%
Local government	16,967	17,067	-100	-0.6%
Total non-agricultural employment	156,133	155,534	599	0.4%

Source: Volusia County Economic Development Department; Strategic Planning Group, Inc. 2011

Eighty percent of Ormond Beach workers are private wage earners and 13% are government workers as shown in Table 11.

**Table 11. Ormond Beach Economic Characteristics, 2009**

Selected Economic Characteristics	Estimate	Margin of Error (+/-)	Percent	Margin of Error (+/-)
<b>CLASS OF WORKER</b>				
<b>Civilian employed population 16 years and over</b>	<b>16,647</b>	<b>682</b>	<b>16,647</b>	<b>(X)</b>
Private wage and salary workers	13,321	669	80.0%	2.2
Government workers	2,139	337	12.8%	2
Self-employed in own not incorporated business workers	1,136	235	6.8%	1.4
Unpaid family workers	51	46	0.3%	0.3
<b>INCOME AND BENEFITS (IN 2009 INFLATION-ADJUSTED DOLLARS)</b>				
<b>Total households</b>	<b>16,328</b>	<b>409</b>	<b>16,328</b>	<b>(X)</b>
Less than \$10,000	1,076	242	6.6%	1.5
\$10,000 to \$14,999	979	200	6.0%	1.2
\$15,000 to \$24,999	1,983	305	12.1%	1.8
\$25,000 to \$34,999	1,877	269	11.5%	1.6
\$35,000 to \$49,999	2,255	306	13.8%	1.8
\$50,000 to \$74,999	3,191	359	19.5%	2.1
\$75,000 to \$99,999	1,760	247	10.8%	1.5
\$100,000 to \$149,999	1,611	242	9.9%	1.5
\$150,000 to \$199,999	666	169	4.1%	1
\$200,000 or more	930	185	5.7%	1.1

Source: US Census ACS, 2005-9 trends, Strategic Planning Group, Inc. 2011

Education and health services is the largest employment sector for Ormond Beach residents; followed by, retail trade, arts and entertainment, and professional services as shown in Table 12.

**Table 12. Ormond Beach Resident Employment Characteristic, 2009**

Selected Economic Characteristics	Estimate	Margin of Error (+/-)	Percent	Margin of Error (+/-)
<b>INDUSTRY</b>				
<b>Civilian employed population 16 years and over</b>	<b>16,647</b>	<b>682</b>	<b>16,647</b>	<b>(X)</b>
Agriculture, forestry, fishing and hunting, and mining	37	36	0.2%	0.2
Construction	1,334	299	8.0%	1.8
Manufacturing	806	231	4.8%	1.4
Wholesale trade	513	192	3.1%	1.1
Retail trade	2,254	337	13.5%	2
Transportation and warehousing, and utilities	460	142	2.8%	0.9
Information	232	101	1.4%	0.6
Finance and insurance, and real estate and rental and leasing	1,444	296	8.7%	1.7
Professional, scientific, and management, and administrative and waste management services	1,876	303	11.3%	1.8
Educational services, and health care and social assistance	4,251	415	25.5%	2.5
Arts, entertainment, and recreation, and accommodation and food services	1,902	389	11.4%	2.2
Other services, except public administration	840	233	5.0%	1.4
Public administration	698	178	4.2%	1

Source: US Census ACS, 2005-9 trends, Strategic Planning Group, Inc. 2011

## D. Commuting Patterns

The commuting patterns of Ormond Beach residents are summarized in Table 13 on the following page. Approximately 38% of Ormond Beach residents work within the City. As a percentage, significantly more female residents work within the City than male residents.

**Table 13. Ormond Beach Commuting Patterns**

<b>Workers By Workplace</b>	<b>Estimate</b>	<b>Margin of Error (+/-)</b>
<b>Total</b>	16,221	695
<b>Living in a Ormond Beach</b>	16,221	695
<b>Worked in Ormond Beach</b>	6,147	591
<b>Worked outside of Ormond Beach</b>	10,074	611
<b>Not living in Ormond Beach</b>	0	136
<b>Male</b>	8,399	520
<b>Living in Ormond Beach</b>	8,399	520
<b>Worked in Ormond Beach</b>	2,795	375
<b>Worked outside of Ormond Beach</b>	5,604	497
<b>Not living in Ormond Beach</b>	0	136
<b>Female</b>	7,822	499
<b>Living in Ormond Beach</b>	7,822	499
<b>Worked in Ormond Beach</b>	3,352	378
<b>Worked outside of Ormond Beach</b>	4,470	412
<b>Not living in Ormond Beach</b>	0	136

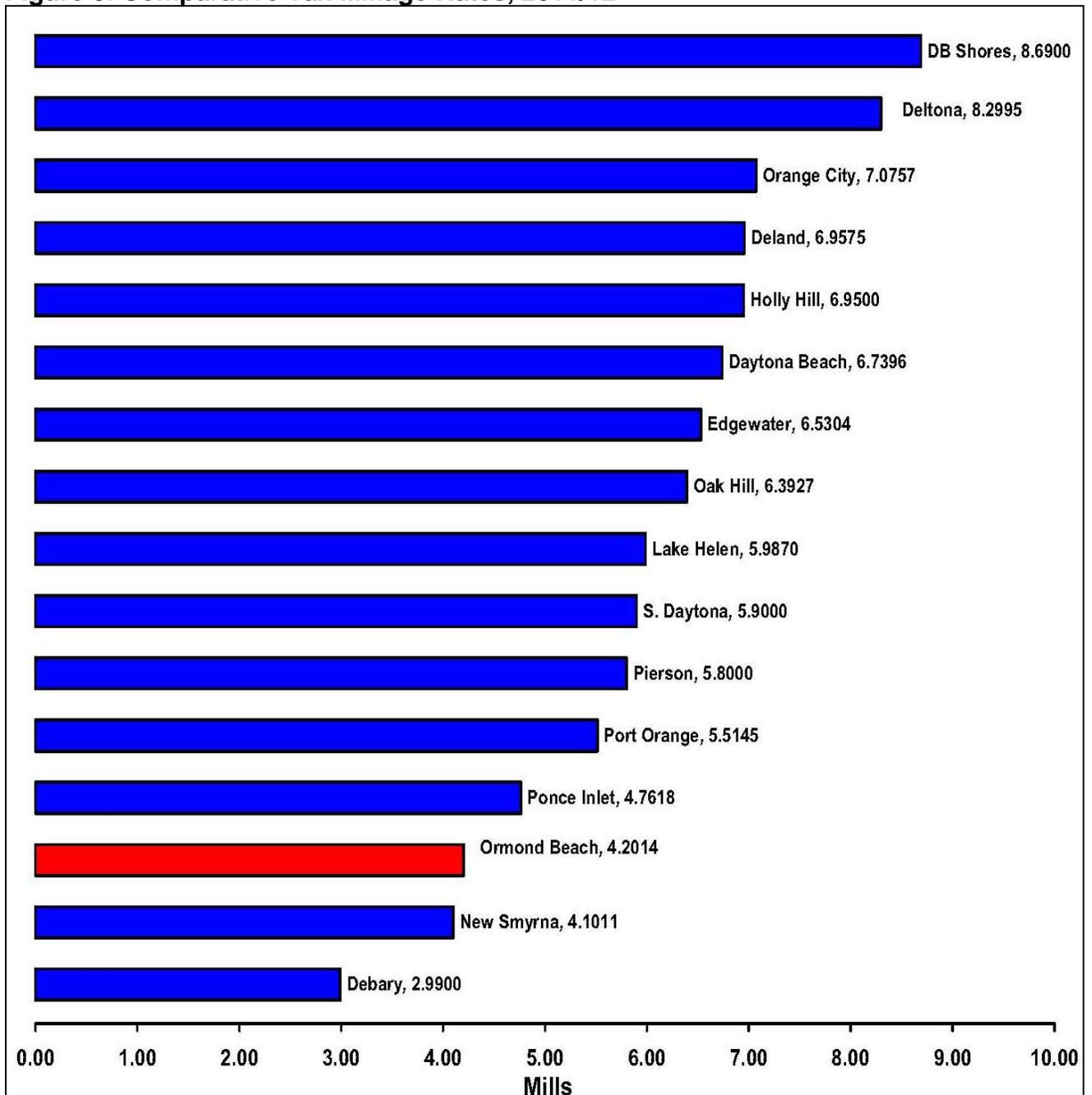
Source: U.S. Census Bureau, 2005-2009 American Community Survey

## **E. Tax Millage Rates**

As of 2011, the City of Ormond Beach has the third lowest operating tax millage rate of all the municipalities in Volusia County. The 2011/12 tax millage rates for municipalities and unincorporated areas of Volusia County are shown in Figure 3 on the following page.

Ormond Beach current millage rate is 4.2014, just slightly higher than New Smyrna Beach's millage of 4.1011, which was the County's second lowest. That said, the Ormond Beach's millage is significantly lower than its surrounding cities. Deltona's millage is 8.2995, and Holly Hill's millage is 6.9500.

Figure 3. Comparative Tax Millage Rates, 2011/12



Source: Ormond Beach 2011/12 City Budget and Strategic Planning Group, Inc.

Ormond Beach's utility rates are also competitive as its rates are the lowest in the County, as shown in Table 14.

**Table 14. Competitive Utility Rates, 2010/11**

City	Water	Sewer	Monthly Total	Annual Total
South Daytona	\$ 33.00	\$ 42.46	\$ 75.46	\$ 905.52
Daytona Beach Shores	\$ 28.22	\$ 38.00	\$ 66.22	\$ 794.64
Daytona Beach	\$ 28.22	\$ 37.71	\$ 65.93	\$ 791.16
Holly Hill	\$ 29.06	\$ 33.41	\$ 62.47	\$ 749.64
Port Orange	\$ 22.85	\$ 30.78	\$ 53.63	\$ 643.56
New Smyrna Beach	\$ 17.23	\$ 34.77	\$ 52.00	\$ 624.00
Ormond Beach	\$ 21.09	\$ 28.36	\$ 49.45	\$ 593.40

Source: Ormond Beach 2011/12 City Budget and Strategic Planning Group, Inc.

## F. Volusia County Location Quotients and Target Industries

### 1. Volusia County Location Quotients

Location Quotients (LQs) are ratios that allow an area's distribution of employment by industry to be compared to the entire U.S., but it can also be a state or a metropolitan area.

If an LQ is equal to 1, then the industry has the same share of its area employment as that of the reference area (i.e. U.S. or Florida). An LQ greater than 1 indicates an industry with a greater share of the local area employment than that in the reference area. For example, (assuming the U.S. as the reference area), Las Vegas would have an LQ greater than 1 in the Leisure and Hospitality industry because this industry makes up a larger share of the Las Vegas employment total, than it does for the country as a whole.

LQ's are calculated by first dividing local industry employment by the all industry total of local employment. Then, reference area industry employment is divided by the all industry total for the reference area. Finally, the local ratio is divided by the reference area ratio.

In comparing Volusia County (as well as Florida and Flagler County) to the United States as a whole, Volusia County has 28 industry sectors that exceed US baseline standards and are therefore considered Basic or Importing industries. Those industries's that exceed 1.06 are shown in Table 15.

**Table 15. Volusia County Location Quotients based on US comparison**

Industry	Florida -- Statewide	Volusia County	Flagler County
Base Industry: Total, all industries	1	1	1
NAICS 111 Crop production	1.6	2.45	1.64
NAICS 711 Performing arts and spectator sports	1.47	2.4	ND
NAICS 314 Textile product mills	0.61	1.99	ND
NAICS 339 Miscellaneous manufacturing	0.84	1.74	0.24
NAICS 623 Nursing and residential care facilities	0.99	1.72	1.22
NAICS 487 Scenic and sightseeing transportation	1.53	1.64	ND
NAICS 611 Educational services	0.88	1.58	0.31
NAICS 441 Motor vehicle and parts dealers	1.17	1.57	1.42
NAICS 445 Food and beverage stores	1.17	1.51	2.12
NAICS 531 Real estate	1.45	1.5	1.63
NAICS 444 Building material and garden supply stores	1.03	1.44	2.13
NAICS 452 General merchandise stores	1.07	1.4	2.04
NAICS 621 Ambulatory health care services	1.14	1.38	0.92
NAICS 722 Food services and drinking places	1.1	1.37	1.38
NAICS 713 Amusements, gambling, and recreation	1.83	1.36	2.78
NAICS 622 Hospitals	0.96	1.3	ND
NAICS 446 Health and personal care stores	1.28	1.29	1.64
NAICS 813 Membership associations and organizations	0.94	1.27	1.43
NAICS 238 Specialty trade contractors	1.17	1.23	1.33
NAICS 453 Miscellaneous store retailers	1.13	1.23	1.14
NAICS 447 Gasoline stations	0.8	1.2	1.33
NAICS 448 Clothing and clothing accessories stores	1.34	1.19	0.79
NAICS 237 Heavy and civil engineering construction	1.08	1.18	0.94
NAICS 442 Furniture and home furnishings stores	1.25	1.16	0.14
NAICS 443 Electronics and appliance stores	1.23	1.15	0.39
NAICS 721 Accommodation	1.52	1.1	0.59
NAICS 811 Repair and maintenance	1.02	1.07	0.93
NAICS 333 Machinery manufacturing	0.41	1.06	0.33

Source: [www.bis.gov/cew/cewlq.htm](http://www.bis.gov/cew/cewlq.htm)

Most of the industries listed in Table 13 illustrate that the County's economic base is oriented to agriculture, tourism/hospitality, and retirees (health related). The County has no real industry "clusters" with only two manufacturing sectors that exceed national averages: miscellaneous manufacturing (1.74) and machinery manufacturing (1.06). To a large degree, Florida is not representative of the US.

Ormond's competitive position is really more oriented to companies that currently operate or desire to operate within Florida. Based on these assumptions, a location quotient analysis was also prepared using the State of Florida as the base. The findings are similar to Table 16.

**Table 16. Volusia County Location Quotients based on Florida comparison**

Industry	Volusia County	Flagler County
Base Industry: Total, all industries		
NAICS 314 Textile product mills	3.25	ND
NAICS 313 Textile mills	2.93	NC
NAICS 333 Machinery manufacturing	2.59	0.81
NAICS 339 Miscellaneous manufacturing	2.06	0.28
NAICS 611 Educational services	1.79	0.35
NAICS 623 Nursing and residential care facilities	1.75	1.23
NAICS 711 Performing arts and spectator sports	1.63	ND
NAICS 111 Crop production	1.53	1.02
NAICS 447 Gasoline stations	1.50	1.67
NAICS 444 Building material and garden supply stores	1.40	2.06
NAICS 622 Hospitals	1.36	ND
NAICS 813 Membership associations and organizations	1.35	1.52
NAICS 441 Motor vehicle and parts dealers	1.34	1.22
NAICS 452 General merchandise stores	1.31	1.91
NAICS 445 Food and beverage stores	1.29	1.82
NAICS 485 Transit and ground passenger transportation	1.28	ND
NAICS 722 Food services and drinking places	1.25	1.26
NAICS 332 Fabricated metal product manufacturing	1.23	0.26
NAICS 621 Ambulatory health care services	1.21	0.81
NAICS 336 Transportation equipment manufacturing	1.10	ND
NAICS 453 Miscellaneous store retailers	1.10	1.01
NAICS 237 Heavy and civil engineering construction	1.09	0.87
NAICS 334 Computer and electronic product manufacturing	1.08	0.55
NAICS 323 Printing and related support activities	1.07	0.29
NAICS 487 Scenic and sightseeing transportation	1.07	ND
NAICS 238 Specialty trade contractors	1.05	1.14
NAICS 562 Waste management and remediation services	1.05	0.9
NAICS 811 Repair and maintenance	1.05	0.91
NAICS 531 Real estate	1.03	1.12
NAICS 446 Health and personal care stores	1.01	1.28
NAICS 624 Social assistance	1.01	ND

Source: [www.bis.gov/cew/cewlq.htm](http://www.bis.gov/cew/cewlq.htm)

Based on Florida, the County has five manufacturing industries that could be considered as exporting sectors: machinery (2.59); miscellaneous (2.06) fabricated metal products (1.23), transportation equipment manufacturing (1.10), and computer and electronic product manufacturing (1.08)

Because location quotients indicate concentrations of industries in a given area they can be used to assist in developing target industries for either retention or expansion or for recruitment.

## **G. Target Industries**

- The 2006-11 SEDP identified the following seven industries as “Target Industries”. These industries were the target industries identified by the Volusia County Economic Development Department).
  - Medical Product Manufacturers
  - Aviation/Avionic Product Manufacturers
  - Marine/Recreational Product Manufacturers
  - Automotive Manufacturing
  - Customer Service & IT Technology Industries
  - Research Development/Manufacturing
  - “Green”/Sustainable Industries
  
- As reported earlier, Volusia County and the City of Ormond Beach are now part of the Orlando-Deltona-Daytona Beach seven-county CSA. The following is a list of sectors targeted by Metro Orlando EDC.
  - Digital Media
  - Modeling, simulation and training
  - Optics and photonics
  - Aviation/aerospace
  - Homeland security/defense
  - Financial services technology (fi-tech)
  - Information technology
  - Agri-technology
  - Energy and alternative fuels
  - Life science/biotechnology
  
- In March 2011, the City’s Economic Development staff arranged a meeting with Ormond Beach CEO’s, which resulted in identifying the following targeted industries for Ormond Beach:
  - Motorcycle parts
  - Companies that manufacture energy related products
  - Aviation/avionics
  - Custom manufacturing equipment builders
  - Aluminum casting
  
- The September 2011 SEDP workshop further identified medical services as another major target sector.

## H. Hospitality Sector

The City's hospitality industry has remained stable since the last SEDP. The City's inventory of hotel/motel rooms is 1,400 rooms as shown in Table 17. There are numerous condominium properties, i.e. Royal Floridian, that provide additional short term hospitality visitor accommodations. One of the City's new SEDP objectives is to attract a hotel with large conferencing facilities.

**Table 17. Hospitality Inventory, 2011**

Hotel/Motel	Number of Rooms
AQUA TERRACE	37
A1A TRAVEL INN	12
BEST WESTERN CASTILLO DEL SOL	147
COMFORT INN	50
COMFORT SUITES	65
CORAL BCH MOTEL	97
CORAL SANDS INN & SEASIDE COTTAGES	103
CORVETTE MOTEL	14
COVE ON ORMOND BEACH	54
DRIFTWOOD RESORT	37
ECONO LODGE INN	70
HAMPTON INN	84
JAMESON INN	67
LA BREEZE HOTEL	40
MAKAI BEACH RESORT	110
MAINSAIL INN & SUITES	43
MAVERICK CONDO HOTEL	140
ORMOND INN	14
QUALITY INN	46
SCOTTISH INNS	60
SLEEP INN	83
TRAVEL INN	11
VANGUARD MOTEL	16
<b>TOTAL ROOM COUNT</b>	<b>1,400</b>

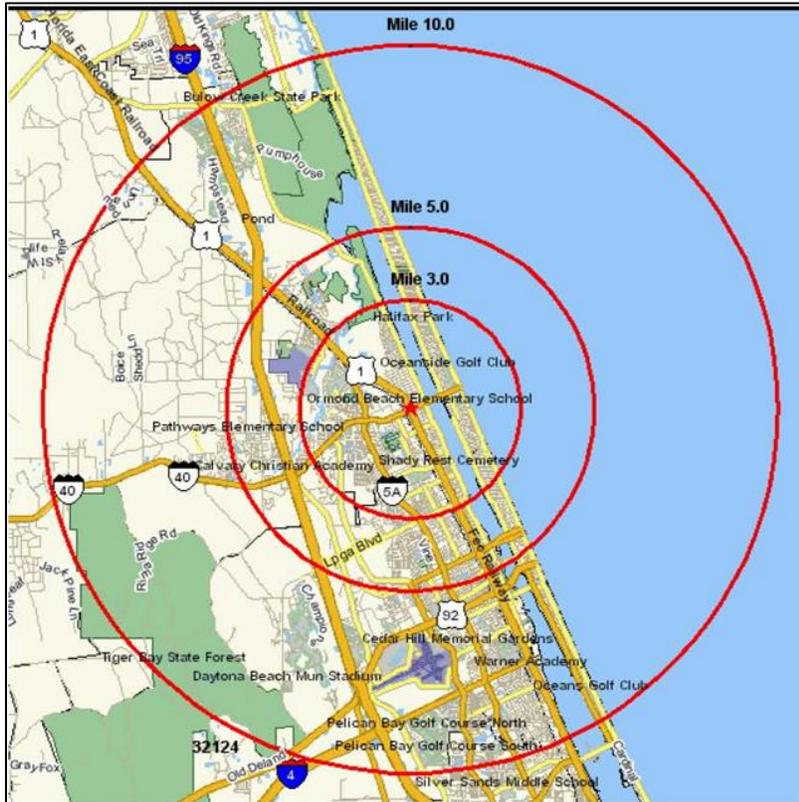
Source: City of Ormond Beach, 2011

## I. Retail Sector

This SEDP addresses the need for increased retail, both new construction and to fill existing vacancies. A detailed analysis for possible retail gaps was prepared for the downtown (3 mile radius) and for the entire city (5 and 10 mile radii). A 3 mile radius is a typical market area for neighborhood oriented retail which usually includes a grocery store as an anchor. The larger 5 and 10 mile radii delineate the primary and secondary

markets for general retail activities other than regional retail which can draw upon a 20 to 30 mile market area.

**Figure 4. Map of Retail Service Areas**



Source: Claritas, Inc., Strategic Planning Group, Inc. 2011

In order to determine the existing retail market supply and demand, SPG commissioned Claritas, Inc. to prepare a proprietary retail gap analysis of the City. Claritas, Inc. is part of The Nielsen Company, one of the largest providers of retail and marketing statistics in the Country. Most of the major retailers use Claritas data in their site selection studies. The Claritas retail gap study identifies total retail expenditures for retail goods (demand) as well as quantifying retail store sales within specified geographic markets (in this case radii). The difference between expenditures (demand) and store sales (supply) indicated that there is a potential for additional store types or that there is a potential surplus of stores in the market area. Detailed retail demand/supply Tables are provided in the appendices.

Table 18, starting on page 27, shows the results of the retail opportunity analysis. Data in red indicate that there are more store sales than local market (radii) demand. This means that the retail stores are attracting customers beyond the immediate markets.

As shown in Table 18, total retail activity (including eating and drinking) is negative for all three markets (i.e. that existing store sales exceed the demand). This can be

explained in a number of ways; the most significant is that retail expenditures come from tourist and other customers from outside the City. An example of the later would be that Wal-Mart attracts buyers from the region not just City residents.

It is important to note that while total retail activity may exceed local demand, individual niche retail demand may have unmet need. The retail sectors in black indicate potential retail opportunities within the three individual market areas (3, 5, 10 mile radii). In some cases there may be a gap (potential for more sales) at the three mile market while a surplus (red) exists at the five mile market. This usually means that stores located within the five mile market are capturing the demand from the smaller three mile market.

It should be noted these are only “potential” opportunities. The gap analysis is only a part of a full retail analysis used by the retail sector. The location and successes of other competitive retails is also an important part of an overall site specific retail analysis. For example, some types of retailer have the ability to cannibalize (or take sales away from existing stores) by virtue of reputation, advertising, lower costs, service, visibility etc.

Based on the Claritas retail gap analysis, there are limited existing retail opportunities without taking sales from existing retails. The top five opportunities (gap) identified at the five digit commodity/store code are<sup>1</sup>:

#### Three (3) Mile Market Area

1. Gasoline Stations with Convenience Store (44711) - \$17.97 million gap
2. Pharmacy/Drugstore (44611) - \$13.52 million gap
3. Other Gas Stations (44719) - \$12.59 million gap
4. Nursery and Garden Centers (44422) - \$5.03 million gap
5. Office Supplies and Stationery Stores (45321) - \$4.06 million gap

#### Five (5) Mile Market Area

1. Pharmacy/Drugstore (44711) - \$27.13 million gap
2. Other Gas Stations (44719) - \$20.04 million gap
3. Home Centers - \$8.79 million gap
4. Nursery and Garden Centers - \$7.88 million gap
5. Hardware Stores - \$5.79 million gap

#### Ten (10) Mile Market Area

1. Pharmacy/Drugstore (44611) - \$33.07 million gap
2. Nursery and Garden Centers (44422) - \$14.28 million gap
3. Hardware Stores (44413) - \$8.72
4. Home Centers (44411) - \$6.46 million gap
5. Sports Goods (45111) - \$5.45 million gap

The summary of the retail analysis (shown by 3 digit commodity/store type code) is shown on the next page. The data which form the basis of this Table are found in the Appendix.

---

<sup>1</sup> This list does not include non store retailers (i.e. catalog, internet based retail, etc.)

Table 18. Retail Opportunity Gap Analysis, 2010

	Opportunity	Opportunity	Opportunity
	Gap/Surplus	Gap/Surplus	Gap/Surplus
	3 mile	5 mile	10 mile
<b>Total Retail Sales Incl Eating and Drinking Places</b>	<b>(24,046,095)</b>	<b>(294,033,049)</b>	<b>(892,230,233)</b>
Motor Vehicle and Parts Dealers-441	62,742,239	(169,527,940)	(182,622,121)
Automotive Dealers-4411	62,723,866	(150,655,094)	(139,428,395)
Other Motor Vehicle Dealers-4412	2,105,926	(12,988,197)	(29,751,447)
Automotive Parts/Accsrs, Tire Stores-4413	(2,087,554)	(5,884,648)	(13,442,278)
Furniture and Home Furnishings Stores-442	(11,391,933)	(9,592,055)	(26,555,318)
Furniture Stores-4421	(12,534,900)	(12,561,457)	(21,799,440)
Home Furnishing Stores-4422	1,142,968	2,969,402	(4,755,879)
Electronics and Appliance Stores-443	6,521,425	(1,215,061)	(60,065,885)
Appliances, TVs, Electronics Stores-44311	4,025,111	(4,143,819)	(59,791,810)
Household Appliances Stores-443111	2,410,223	(5,487,931)	(12,037,907)
Radio, Television, Electronics Stores-443112	1,614,889	1,344,112	(47,753,903)
Computer and Software Stores-44312	1,855,798	3,205,260	1,275,529
Camera and Photographic Equipment Stores-44313	640,516	(276,503)	(1,549,603)
Building Material, Garden Equip Stores -444	(11,205,842)	(1,123,532)	1,526,174
Building Material and Supply Dealers-4441	(16,385,001)	(9,603,931)	(13,991,831)
Home Centers-44411	(5,556,508)	8,785,572	6,461,306
Paint and Wallpaper Stores-44412	(847,469)	185,261	(8,055,440)
Hardware Stores-44413	3,155,755	5,778,557	8,720,296
Other Building Materials Dealers-44419	(13,136,779)	(24,353,321)	(21,117,991)
Building Materials, Lumberyards-444191	(4,965,681)	(9,246,751)	(7,395,442)
Lawn, Garden Equipment, Supplies Stores-4442	5,179,160	8,480,398	15,518,004
Outdoor Power Equipment Stores-44421	149,597	595,833	1,230,538
Nursery and Garden Centers-44422	5,029,561	7,884,565	14,287,465
Food and Beverage Stores-445	(96,675,294)	(80,199,191)	(101,469,948)
Grocery Stores-4451	(96,474,979)	(80,661,159)	(105,352,879)
Supermarkets, Grocery (Ex Conv) Stores-44511	(95,782,111)	(77,900,410)	(100,326,440)
Convenience Stores-44512	(692,868)	(2,760,748)	(5,026,439)
Specialty Food Stores-4452	524,545	220,463	(53,946)
Beer, Wine and Liquor Stores-4453	(724,860)	241,505	3,936,877
Health and Personal Care Stores-446	10,622,831	19,939,635	22,116,826
Pharmancies and Drug Stores-44611	13,518,102	27,128,610	33,068,836
Cosmetics, Beauty Supplies, Perfume Stores-44612	1,299,106	1,513,008	1,227,044
Optical Goods Stores-44613	690,698	1,048,373	(2,046,920)
Other Health and Personal Care Stores-44619	(4,885,076)	(9,750,355)	(10,132,135)
Gasoline Stations-447	30,563,157	8,879,468	32,980,544
Gasoline Stations With Conv Stores-44711	17,972,886	(11,473,907)	(6,486,790)
Other Gasoline Stations-44719	12,590,270	20,353,376	39,467,334

Source: Claritas, Inc.; Strategic Planning Group, Inc. 2011

Table 18. Retail Opportunity Gap Analysis, 2010, continued

	Opportunity Gap/Surplus	Opportunity Gap/Surplus	Opportunity Gap/Surplus
	3 mile	5 mile	10 mile
Clothing and Clothing Accessories Stores-448	(10,319,254)	(11,008,655)	(101,114,854)
Clothing Stores-4481	(11,178,568)	(9,348,162)	(86,256,097)
Men's Clothing Stores-44811	588,008	462,862	(893,373)
Women's Clothing Stores-44812	807,292	2,300,379	(38,771)
Childrens, Infants Clothing Stores-44813	910,799	1,753,241	985,693
Family Clothing Stores-44814	(12,477,360)	(8,812,504)	(76,656,408)
Clothing Accessories Stores-44815	(179,840)	(975,952)	(1,904,738)
Other Clothing Stores-44819	(827,466)	(4,076,189)	(7,748,500)
Shoe Stores-4482	703,063	2,601,478	(4,045,572)
Jewelry, Luggage, Leather Goods Stores-4483	156,250	(4,261,970)	(10,813,185)
Jewelry Stores-44831	947,441	2,124,666	(3,987,732)
Luggage and Leather Goods Stores-44832	(791,190)	(6,386,636)	(6,825,453)
Sporting Goods, Hobby, Book, Music Stores-451	4,138,975	6,555,235	(7,410,786)
Sportng Goods, Hobby, Musical Inst Stores-4511	1,051,918	5,343,660	1,700,065
Sporting Goods Stores-45111	2,542,894	4,663,650	5,453,075
Hobby, Toys and Games Stores-45112	1,963,762	3,110,143	(1,333,688)
Sew/Needlework/Piece Goods Stores-45113	92,095	537,554	1,066,562
Musical Instrument and Supplies Stores-45114	(3,546,831)	(2,967,685)	(3,485,885)
Book, Periodical and Music Stores-4512	3,087,057	1,211,573	(9,110,850)
Book Stores and News Dealers-45121	2,639,543	907,472	(9,827,186)
Book Stores-451211	2,475,446	626,359	(10,362,931)
News Dealers and Newsstands-451212	164,098	281,113	535,744
Prerecorded Tapes, CDs, Record Stores-45122	447,514	304,101	716,337
General Merchandise Stores-452	(2,299,392)	(7,106,943)	(285,980,899)
Department Stores Excl Leased Depts-4521	8,206,432	25,957,762	(30,185,462)
Other General Merchandise Stores-4529	(10,505,823)	(33,064,705)	(255,795,437)
Miscellaneous Store Retailers-453	4,921,544	(7,315,380)	(43,776,396)
Florists-4531	740,847	1,339,681	1,894,548
Office Supplies, Stationery, Gift Stores-4532	657,308	(14,947,384)	(41,483,169)
Office Supplies and Stationery Stores-45321	4,056,905	(9,260,000)	(26,418,592)
Gift, Novelty and Souvenir Stores-45322	(3,399,597)	(5,687,384)	(15,064,577)
Used Merchandise Stores-4533	(339,933)	(1,294,045)	(1,552,075)
Other Miscellaneous Store Retailers-4539	3,863,322	7,586,368	(2,635,701)
Non-Store Retailers-454	47,240,389	61,331,038	90,770,787
Foodservice and Drinking Places-722	(58,904,943)	(103,649,670)	(230,628,356)
Full-Service Restaurants-7221	(32,421,227)	(45,755,332)	(99,942,520)
Limited-Service Eating Places-7222	(30,247,338)	(46,612,906)	(107,614,528)
Special Foodservices-7223	3,320,588	(669,656)	(2,627,407)
Drinking Places -Alcoholic Beverages-7224	443,036	(10,611,775)	(20,443,901)

Source: Claritas, Inc.; Strategic Planning Group, Inc. 2011

Claritas also generates data on retail activity sold in department stores (as opposed to store specific retail). These department store retail activities are referred to as GAFO sales and include general merchandise, clothing and clothing accessories, furniture and “other” sales. These figures are not included in those figures contained in Table 18.

The GAFO potential opportunities identified by Claritas include electronics, and sporting goods, hobby, book and music sales.

**Table 19. Retail Opportunity Gap Analysis, 2010, continued**

	Opportunity	Opportunity	Opportunity
	Gap/Surplus	Gap/Surplus	Gap/Surplus
	3 mile	5 mile	10 mile
<b>GAFO *</b>	(12,692,869)	(37,314,863)	(522,610,909)
General Merchandise Stores-452	(2,299,392)	(7,106,943)	(285,980,899)
Clothing and Clothing Accessories Stores-448	(10,319,254)	(11,008,655)	(101,114,854)
Furniture and Home Furnishings Stores-442	(11,391,933)	(9,592,055)	(26,555,318)
Electronics and Appliance Stores-443	6,521,425	(1,215,061)	(60,065,885)
Sporting Goods, Hobby, Book, Music Stores-451	4,138,975	6,555,235	(7,410,786)
Office Supplies, Stationery, Gift Stores-4532	657,308	(14,947,384)	(41,483,169)
* GAFO (General merchandise, Apparel, Furniture and Other) represents sales at stores that sell merchandise normally sold in department stores. This category is not included in Total Retail Sales Including Eating and Drinking Places.			

Source: Claritas, Inc.; Strategic Planning Group, Inc. 2011

## J. Economy Summary

- Ormond Beach’s local economy has been, and is forecast to remain, relatively stable during the near future. The positive impact of Ormond Crossings was not felt due to the extended time required for the development to secure all its permits. These permits are either in place or should be in place within the next six months.
- The City has a strong existing manufacturing base to build on.
- The hospitality industry plays a major role in both the Volusia County and City of Ormond Beach economies. According to State statistics there has been a slight increase in overall lodging rooms within the City.
- There are limited but still significant retail opportunities for the downtown area as well as the City as a whole.
- As of 2011, the City of Ormond Beach had the third lowest operating tax millage rate and the lowest monthly utility fees in the County.

## IV. PROGRESS REVIEW OF THE 2006-2011 STRATEGIC ECONOMIC DEVELOPMENT PROGRAM

### A. Progress Review

For the most part all of the macro goals, objectives and action steps defined within the 2006-11 SEDP have been accomplished. The major action steps not accomplished all relate to Ormond Crossings and the fact that it did not obtain all its permits during the 2006-11 time period. The following Table shows an accounting of the progress made by specific objective. A “Y” under Status means that the action step has been completed.

**Table 20. Progress Review of 2006-11 SEDP**

	Action Steps	Status 2011	Year 1	Year 2	Year 3	Year 4	Year 5
<b>OBJ. 1.1</b>	<b>Create a healthy business environment</b>						
1.1.1	Streamline permitting process	Y					
1.1.2	Evaluate workforce housing opportunities	Y					
1.1.3	Evaluation of infrastructure needs	Y					
1.1.4	Annual tax rate analysis	Y					
1.1.5	Review development standards	Y					
1.1.6	Fiscal impact analysis software	not needed					
1.1.7	Business assistance program	Y					
1.1.8	Promote community activities	Y					
<b>OBJ. 1.2</b>	<b>Assist businesses in hiring/training skilled labor force</b>	-----					
1.2.1	Coordinate with Workforce Development Board	Y					
<b>OBJ. 1.3</b>	<b>Assist businesses access to capital/financial incentive</b>	-----					
1.3.1	Establish informational repository for financial incentive programs	Y					
1.3.2	Establish process for financial institutions to review capital	Y					
1.3.3	Prepare forms and guidelines for Ad Valorem Tax Abatement	Y					
1.3.4	State and Federal grants assistance	Y					
1.3.5	Establish/promote venture capital group(s)	N					
<b>OBJ. 1.4</b>	<b>Assist commercial/industrial business expansion</b>	-----					
1.4.1	Inventory airport/business park properties/prepare marketing	Y					
1.4.2	Coordinate Ormond Crossings development process	Y					
<b>OBJ. 1.5</b>	<b>Develop reuse program for Florida Memorial Hospital</b>	-----					
1.5.1	Inventory hospital property - conduct highest & best use study	Y					
1.5.2	Solicit local developer interest for hospital property re-use	Y					
1.5.3	Solicit national developer interest for property reuse	Y					
<b>OBJ. 2.1</b>	<b>Ensure sufficient properties available for business</b>	-----					
2.1.1	Prepare inventory & data base-vacant public lands	Y					
2.1.2	Identify appropriate properties for pre-permitting/evaluation process	Y					
2.1.3	Fast-track development process for target industries	Y					
<b>OBJ. 2.2</b>	<b>Create regional commerce park (Ormond Crossings)</b>	-----					
2.2.1	Assist City staff with technical analysis of DRI & DO	Y					
2.2.2	Finalize North Mainland CRA Plan - funding/timing	Y					
2.2.3	Review designs and funding options for modified interchange	Y					

## B. Summary of Accomplishments

Since the completion of the City's first Strategic Economic Development Program in 2006, the City was able to assist in creating or retaining 955 jobs, and received over \$3 million in land sales, leases or grants. These activities generated 147,000 square feet of new construction and over \$30 million in capital investment. These figures are significant given that for most of this time period the region, State and Nation have been in a recession or significant economic downturn.

**Figure 5. 2006-11 Performance Measures.**

Economic Development Performance Measures 2006-2011				
ED Initiative	Jobs	City Revenue land sales/lease/grant\$	Building constr.	Construction/ Capital investment
Business Recruitment	150	\$ 746,000	66,600 sf	\$6,050,000
Business Expansion	245	\$ 20,000	80,000 sf	\$24,320,000
Business Retention	550	NA	NA	\$50,000
Airport/Bus. Park	10	\$2,486,000	NA	NA
<b>Total</b>	<b>955</b>	<b>\$3,252,000</b>	<b>146,600 sf</b>	<b>\$30,420,000</b>

Note: Business Retention/Expansion projects are due to acquisitions, merger, consolidation, or reduction in business. Staff worked with companies exploring possible plant relocation or consolidation to a business division in an area outside of Ormond beach. Job and investment figures obtained from company at the time of staff involvement.

Financial impact analysis does not include revenue generated by Ad Valorem Tax Revenue, Franchise Fees or utility taxes.

Job Creation Numbers are direct and do not include 1.37 additional jobs will be created based on the RIMS II multiplier, US Department of Commerce: Bureau of Labor Statistics.

## C. Downtown Ormond Beach

The 2006-11 SEDP addressed the need to strengthen the Downtown (CRA) which is shown on the following figure.

Figure 6. Downtown (CRA) Boundaries

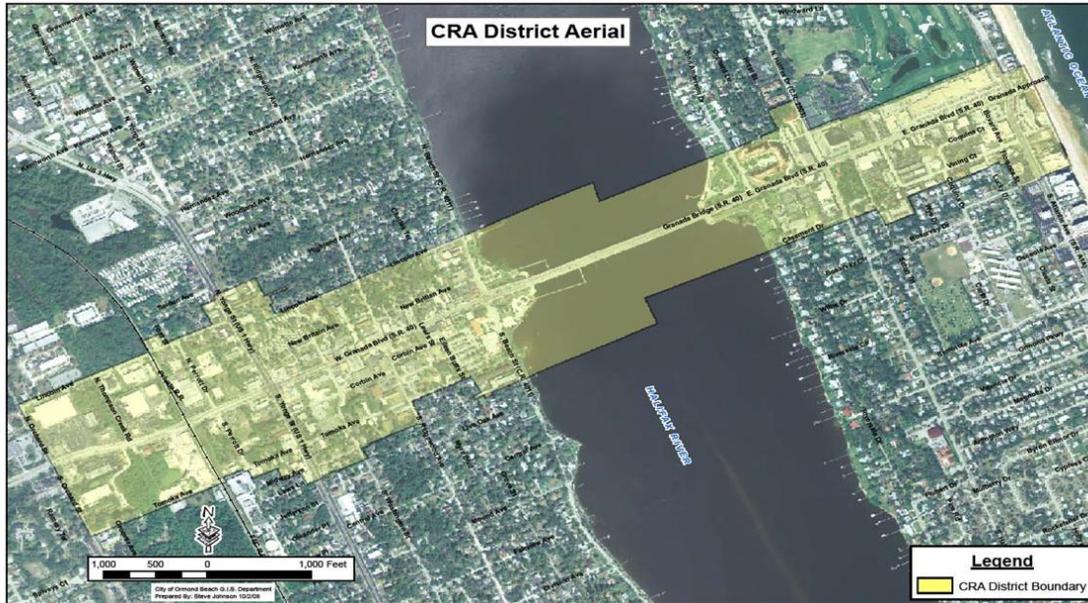


Figure 7 summarizes the initiatives made to the Downtown. They include a \$15 million private investment in the Grand Floridian and slightly over \$1 million in private investment in property improvements throughout downtown.

Figure 7. Ormond Main Street Initiatives.

<b>Private Sector Investment:</b>	
➤ Grand Floridian time share hotel restoration of 115 units and construction of 53 new units-	\$15,400,000
➤ Property improvement projects-	\$1,025,000
<b>Public Sector Investment:</b>	
➤ Casements & Rockefeller Gardens Improvements	\$1,270,000
➤ Property Improvement Grants	\$800,000
➤ LED street Lights & Poles	\$418,500
➤ Granada Beach Approach	\$253,600
➤ Streetscape/Roadway Improvements	\$225,000
➤ Thompson Creek Improvements	\$250,000
➤ Art projects	\$50,000
<b>Total</b>	<b>\$ 3,242,100</b>
➤ Estimated jobs created from new restaurants, fitness club, hardware store, and other service businesses: 110	

## V. PREPARING THE STRATEGIC ECONOMIC DEVELOPMENT PLAN

### A. The Old Plan

The 2006-11 SEDP stated the Five-Year Strategic Economic Development Plan would be created to shape the existing and future landscape of Ormond Beach by being proactive in business retention, expansion, and attraction. The plan was relatively comprehensive and contained 3 major goals, 24 objectives and 54 strategies.

It defined its macro goals as:

### B. Macro-Goals:

- Expand the Ormond Beach non-residential tax base and other revenue sources.
- Provide for a variety of employment opportunities in Ormond Beach.
- Maintain and increase financial wealth of Ormond Beach residents.
- Ensure quality commercial and industrial development.

The objectives and action steps of the Economic Development Strategic Plan were based on three major goals or areas of economic development. These included:

- Business Retention and Expansion
- Business Recruitment and Future Business Centers
- Downtown Redevelopment and Visitor Attraction

### C. The New Strategic Economic Development Plan

Using the 2006-11 SEDP as a starting point, Strategic Planning Group, Inc., working with the City's Economic Development Department staff, conducted a workshop on September 17, 2011 that included some participants from business and industry, public agencies, and the general public. Some 27 persons attended the five-hour session. A presentation of economic and demographic data establishing "what and where" the City is at the present time as well as a review of what was accomplished as it related to the 2006-11 SEDP, was given by the SPG team. The participants were then divided into three focus groups to provide principal oversight and input as it related to the review of the older SEDP with respect to its overall Mission, its macro goals and objectives. The workshop resulted in revising some of the older wording as it related to the Mission, as well as refinement to older objectives and added new objectives to the new Three-Year Strategic Economic Development Plan that will be managed by the City's Economic Development Department.

### **1. Mission Statement:**

The mission of the Strategic Economic Plan is to influence the existing and future landscape of Ormond Beach by being proactive in business retention, expansion and attraction.

### **2. Macro Goals:**

- Expand the Ormond Beach non-residential tax base and other revenue sources.
- Provide for a variety of employment opportunities in Ormond Beach.
- Maintain and increase financial wealth of Ormond Beach residents.
- Ensure quality commercial and industrial development.
- Increase participation and regional coordination of economic development efforts to eliminate redundancies.

### **3. Ormond Beach Strengths and Weaknesses**

The City's strengths and weaknesses were determined in part by the consultant team and by the participants of the Strategic Economic Development Workshop.

#### **Weakness**

Several of the older weaknesses, such as affordable housing are now strengths. The weaknesses identified by the workshop were:

- Limited airport service from Daytona International.
- Lack of independent identity/branding.
- A limited skilled labor pool.
- Lack of a major chain flagship type hotel with large business conference center.
- Awareness of downtown parking availability.
- Lack of entry level employment opportunities.

#### **Strengths**

The following are the City's strengths as defined in the workshop:

- Positive local image.
- Highest ranked schools in Volusia County.
- Part of the High-tech Corridor.
- Proximity to 10 colleges & universities (Daytona State College, Bethune-Cookman College, University of Central Florida, Stetson University, Embry-Riddle Aeronautical University, Palmer Chiropractic College, Nova Southeastern University, International Academy, Keiser University, University of Phoenix, Phoenix College of Aeronautics) and Wyotech Institute.
- Rail service – Florida East Coast Railroad.
- Ormond Beach Municipal Airport (1,128 acres).

- Airport Business Park – competitive, lower-cost land.
- Cost competitive infrastructure (water, sewer, electric, and communications) to service industrial/commercial expansion.
- Planned 3,000-acre Ormond Crossings – 4.7 Million square feet commercial/industrial space (1,000 acres).
- Superior quality of Life – beaches, ocean, recreational facilities and parks.
- Quality of residential developments.
- Low crime rate.
- Highly educated work force.
- Numerous special events that bring in additional dollars.
- Consistent/stable/supportive local government
- Best place to retire
- Available workforce housing
- Available and buildable industrial sites
- Large variety of places of worship

#### **4. Objectives**

The expanded Objectives by the three main Economic Development areas are:

##### **Retention and Expansion**

- OBJ. 1.1 Foster a healthy business environment
- OBJ. 1.2 Assist businesses in hiring/training skilled labor force
- OBJ. 1.3 Assist businesses access to capital/financial incentive programs
- OBJ. 1.4 Assist commercial/industrial business expansion
- OBJ. 1.5 Develop reuse program for Florida Memorial Hospital properties
- OBJ. 1.6 Evaluate existing business regulations for simplicity and efficiency
- OBJ. 1.7 Identify additional economic opportunity areas

##### **Recruitment**

- OBJ. 2.1 Ensure sufficient properties available for business expansion
- OBJ. 2.2 Create regional commerce park (Ormond Crossings) and SW Quadrant of the Airport
- OBJ. 2.3 Coordinate marketing strategies to attract industry
- OBJ. 2.4 Provide/identify businesses access to financial incentive programs
- OBJ. 2.5 Launch a marketing program to "brand the City"
- OBJ. 2.6 Attract new industries to the Ormond Beach Airport
- OBJ. 2.7 Identify/recruit "green"/sustainable energy industry
- OBJ. 2.8 Promote green industries and standards
- OBJ. 2.9 Analyze our competitiveness (incentives etc.)
- OBJ. 2.10 Partner with ERAU for additional facilities to support expansion of new tech park
- OBJ. 2.11 Develop active marketing program for the motorcycle industries

### **Downtown, Visitation, Retail**

- OBJ. 3.1 Update current CRA Downtown Master Plan
- OBJ. 3.2 Review and design financial assistance programs for downtown businesses
- OBJ. 3.3 Promote visitor attractions to the downtown
- OBJ. 3.4 Market the Main Street and visitor attractions
- OBJ. 3.5 Develop an Arts District
- OBJ. 3.6 Implement the Granada Opportunity Zone

## VI. THE STRATEGIC ECONOMIC DEVELOPMENT PLAN

### A. Retention/Expansion

	Action Steps	Year 1	Year 2	Year 3
<b>OBJ. 1.1 Foster a healthy business environment</b>				
1.1.1	Conduct Annual Business Survey (create new business list/inventory)			
1.1.2	Annual tax rate analysis			
1.1.3	Business assistance program			
1.1.4	Promote community activities			
1.1.5	Conduct Business Visitation Program			
1.1.6	Create "Gateways" into the City			
<b>OBJ. 1.2 Assist businesses in hiring/training skilled labor force</b>				
1.2.1	Coordinate with Workforce Development Board			
<b>OBJ. 1.3 Assist businesses access to capital/financial incentive programs</b>				
1.3.1	Establish a City incentive program			
1.3.2	Establish informational repository for financial incentive programs			
1.3.3	Establish process for financial institutions to review capital needs			
1.3.4	Assist with State and Federal grants			
<b>OBJ. 1.4 Assist commercial/industrial business expansion</b>				
1.4.1	Update Inventory airport/business park properties/prepare marketing material			
1.4.2	Work with County on possible trade opportunites			
1.4.3	Develop Furniture/Home Improvement District Marketing Program			
<b>OBJ. 1.5 Develop reuse program for Florida Memorial Hospital properties</b>				
1.5.1	Work with the Hospital/agents to assist in reuse of property			
<b>OBJ. 1.6 Evaluate existing business regulations for simplicity and efficiency</b>				
1.6.1	Streamline permitting process			
1.6.2	Review development standards			
<b>OBJ. 1.7 Identify additional economic opportunity areas</b>				
1.7.1	Promote internship with businesses and educational institutions			

## B. RECRUITMENT

	Action Steps	Year 1	Year 2	Year 3
<b>OBJ. 2.1 Ensure sufficient properties available for business expansion</b>				
2.1.1	Update inventory & data base-vacant public lands			
2.1.2	Fast-track development process for target industries			
<b>OBJ. 2.2 Create regional commerce park (Ormond Crossings) and SW Quadrant of Airport</b>				
2.2.1	Approve Design Standards and PMUD			
2.2.2	Support Developer with wetland permits			
2.2.3	Encourage infrastructure construction			
2.2.4	Approve Master Development Plans for SW Quadrant			
2.2.5	Infrastructure construction of SW Quadrant			
<b>OBJ. 2.3 Coordinate marketing strategies to attract industry</b>				
2.3.1	Identify and prepare list of target industries			
2.3.2	Prepare marketing package for Ormond Crossings Commerce Park and Southwest Quad			
2.3.3	Create a business attraction team for Ormond Crossings			
2.3.4	Identify and attend trade shows and conferences			
2.3.5	Work with CBE to communicate/coordinate job skills needs for future industries			
2.3.6	Develop marketing strategies for each key industries			
2.3.7	Work with local business CEOs to identify sector businesses			
2.3.8	Explore medical sector growth opportunities			
2.3.9	Work with retailers, brokers, developers and property owners to fill vacant spaces and/or expand retail opportunities within the City			
2.3.10	Continually update the City's Webpage (economic development)			

Recruitment, cont.

	Action Steps	Year 1	Year 2	Year 3
<b>OBJ. 2.4</b>	<b>Provide/identify businesses access to financial incentive programs</b>			
2.4.1	Identify capital resources for new businesses			
2.4.2	Prepare an inventory business incentives			
<b>OBJ. 2.5</b>	<b>Launch a marketing program to "Brand the City"</b>			
2.5.1	Explore new branding concepts			
<b>OBJ. 2.6</b>	<b>Attract new industries to the Ormond Beach Airport</b>			
2.6.1	Identify/recruit aviation industry businesses			
<b>OBJ. 2.7</b>	<b>Identify/recruit "green"/sustainable energy industry</b>			
2.7.1	Recruit green/energy sustainable businesses			
2.7.2	Utilize funding incentives for energy renewable businesses			
<b>OBJ. 2.8</b>	<b>Promote green industry standards</b>			
2.8.1	Work with staff/commission/business community to develop/implement building standards			
<b>OBJ. 2.9</b>	<b>Analyze our Competitiveness</b>			
2.9.1	Evaluate annually our competitive position related to millage, utilities, incentives, etc.			
<b>OBJ. 2.10</b>	<b>Partner with ERAU for additional facilities to support expansion of new tech park</b>			
2.10.1	Work with ERAU administration to expand facilities into Ormond Beach			
<b>OBJ. 2.11</b>	<b>Develop active marketing program for the motorcycle industry</b>			
2.11.1	Research motorcycle and related industry for possible recruitment			

### C. Downtown Town, Hospitality, Retail

	Action Steps	Year 1	Year 2	Year 3
<b>OBJ. 3.1 Update current CRA Downtown Master Plan</b>				
3.1.1	Participate in downtown plan implementation program			
3.1.2	Present retail/commercial gap opportunities to Mainstreet Inc.			
3.1.3	Establish a downtown retail recruitment team			
3.1.4	Conduct more site specific retail market studies			
<b>OBJ 3.2 Review and design financial assistance programs for Downtown businesses</b>				
3.2.1	Promote downtown grant program			
3.2.2	Evaluate the feasibility of business loans/grant program			
<b>OBJ. 3.3 Promote visitor attraction to the Downtown</b>				
3.3.1	Work with Mainstreet Inc. to develop a marketing plan to attract visitors			
3.3.2	Promote use of Casements by business community			
<b>OBJ 3.4 Market the Main Street and Visitor Attraction</b>				
3.4.1	Work with Mainstreet Inc. to produce and distribute Main Street marketing material			
3.4.2	Coordinate with Mainstreet Inc.the creation of new cultural, retail stores, restuarants, and special events to attract visitors downtown			
<b>OBJ 3.5 Develop an Arts District</b>				
3.5.1	Support Mainstreet Inc. in implementing an Arts District			
<b>OBJ 3.6 Implement the Granada Opportunity Zone</b>				
3.6.1	Support implementation of the Granada Opportunity Zone program			

## VII. STRATEGIC PLAN CONCLUSION

The 2011-2014 Strategic Economic Development Plan for the City of Ormond Beach is intended to serve as a guide for the diversification and strengthening of the local economy and to identify economic development opportunities most appropriate for the City over the next three years.

Historically, the City's tax base and resultant revenue generation has been heavily dependent upon residential development which accounted for 74 percent of the City's tax revenues. In addition, only 449 acres of undeveloped commercial/industrial land existed within the City for future commercial/industrial development. However, with Ormond Crossings in position to plan the infrastructure and subsequent marketing of Commerce Park site, the City's commercial/industrial inventory has increased to just over 1,449 acres.

The plan's major goals are focused on business retention/expansion and the recruitment of business within the City of Ormond Beach. The third goal is orientated toward strengthening the downtown Central Business District (CBD), as a means for anchoring the City, expanding the community's sense of place and attracting visitors. It also focuses on expanding retail opportunities throughout the City.

The implementation of the 2011-14 SEDP will result in a positive cost benefit ratio for the City as outlined above by continuing the success of the 2006-2011 SEDP by increasing the amount of commercial/industrial versus residential land uses since the commercial/industrial land uses generate greater revenues, i.e. property, franchise, sales taxes than required municipal services/costs. The exact cost benefit ratio will vary by specific projects depending upon specific capital investment levels, new employment generated, and employee wages or salary levels. The analysis of the implementation of the 2006-11 SEDP revealed that initiatives of the Plan assisted businesses in retaining and growing 995 jobs with an associated \$30 million private capital investment, all during a period that included a national and regional recession and without the development of Ormond Crossings.

The new 2011-14 SEDP is designed to encourage a cooperative public/private approach to accomplishing the goals, objectives, and action steps, related to business retention/expansion, business recruitment, and retail/downtown redevelopment.

## VIII. APPENDICES

- A. CENSUS PROFILE DATA - 2007- 2009 ACS
- B. CENSUS PROFILE DATA – 2005-2009 ACS
- C. CLARITAS DOWNTOWN DEMOGRAPHICS
- D. ORMOND BEACH RETAIL GAP ANALYSIS

## A. APPENDIX. 2007-2009 CENSUS DATA (American Community Survey)



### Ormond Beach city, Florida

#### Selected Economic Characteristics: 2007-2009

Data Set: 2007-2009 American Community Survey 3-Year Estimates

Survey: American Community Survey

NOTE: Although the American Community Survey (ACS) produces population, demographic and housing unit estimates, it is the Census Bureau's Population Estimates Program that produces and disseminates the official estimates of the population for the nation, states, counties, cities and towns and estimates of housing units for states and counties.

For more information on confidentiality protection, sampling error, nonsampling error, and definitions, see Survey Methodology.

Selected Economic Characteristics	Estimate	Margin of Error	Percent	Margin of Error
<b>EMPLOYMENT STATUS</b>				
<b>Population 16 years and over</b>	<b>32,522</b>	<b>+/-650</b>	<b>32,522</b>	<b>(X)</b>
In labor force	17,486	+/-899	53.8%	+/-2.7
Civilian labor force	17,486	+/-899	53.8%	+/-2.7
Employed	16,830	+/-862	51.7%	+/-2.6
Unemployed	656	+/-235	2.0%	+/-0.7
Armed Forces	0	+/-177	0.0%	+/-0.2
Not in labor force	15,036	+/-990	46.2%	+/-2.7
<b>Civilian labor force</b>	<b>17,486</b>	<b>+/-899</b>	<b>17,486</b>	<b>(X)</b>
Percent Unemployed	3.8%	+/-1.3	(X)	(X)
<b>Females 16 years and over</b>				
<b>Population 16 years and over</b>	<b>17,415</b>	<b>+/-626</b>	<b>17,415</b>	<b>(X)</b>
In labor force	8,161	+/-748	46.9%	+/-3.8
Civilian labor force	8,161	+/-748	46.9%	+/-3.8
Employed	7,831	+/-737	45.0%	+/-3.7
<b>Own children under 6 years</b>	<b>1,674</b>	<b>+/-456</b>	<b>1,674</b>	<b>(X)</b>
All parents in family in labor force	937	+/-371	56.0%	+/-16.5
<b>Own children 6 to 17 years</b>	<b>4,504</b>	<b>+/-667</b>	<b>4,504</b>	<b>(X)</b>
All parents in family in labor force	3,015	+/-605	66.9%	+/-9.0
<b>COMMUTING TO WORK</b>				
<b>Workers 16 years and over</b>	<b>16,543</b>	<b>+/-859</b>	<b>16,543</b>	<b>(X)</b>
Car, truck, or van -- drove alone	13,956	+/-958	84.4%	+/-3.0
Car, truck, or van -- carpooled	1,139	+/-323	6.9%	+/-2.0
Public transportation (excluding taxicab)	57	+/-57	0.3%	+/-0.3
Walked	101	+/-73	0.6%	+/-0.4
Other means	540	+/-208	3.3%	+/-1.2
Worked at home	750	+/-237	4.5%	+/-1.5
Mean travel time to work (minutes)	20.9	+/-1.8	(X)	(X)
<b>OCCUPATION</b>				
<b>Civilian employed population 16 years and over</b>	<b>16,830</b>	<b>+/-862</b>	<b>16,830</b>	<b>(X)</b>
Management, professional, and related occupations	6,994	+/-643	41.6%	+/-3.3
Service occupations	2,910	+/-493	17.3%	+/-2.8
Sales and office occupations	4,441	+/-584	26.4%	+/-3.2
Farming, fishing, and forestry occupations	37	+/-42	0.2%	+/-0.3
Construction, extraction, maintenance, and repair occupations	1,509	+/-405	9.0%	+/-2.3
Production, transportation, and material moving occupations	939	+/-316	5.6%	+/-1.8
<b>INDUSTRY</b>				
<b>Civilian employed population 16 years and over</b>	<b>16,830</b>	<b>+/-862</b>	<b>16,830</b>	<b>(X)</b>

**APPENDIX A. 2007-2009 CENSUS DATA (American Community Survey), continued**

Selected Economic Characteristics	Estimate	Margin of Error	Percent	Margin of Error
Agriculture, forestry, fishing and hunting, and mining	41	+/-48	0.2%	+/-0.3
Construction	1,634	+/-470	9.7%	+/-2.8
Manufacturing	813	+/-330	4.8%	+/-1.9
Wholesale trade	627	+/-252	3.7%	+/-1.5
Retail trade	2,652	+/-492	15.8%	+/-2.7
Transportation and warehousing, and utilities	480	+/-221	2.9%	+/-1.3
Information	181	+/-94	1.1%	+/-0.5
Finance and insurance, and real estate and rental and leasing	1,047	+/-253	6.2%	+/-1.4
Professional, scientific, and management, and administrative and waste management services	1,725	+/-435	10.2%	+/-2.7
Educational services, and health care and social assistance	4,459	+/-602	26.5%	+/-3.4
Arts, entertainment, and recreation, and accommodation and food services	1,963	+/-480	11.7%	+/-2.7
Other services, except public administration	671	+/-275	4.0%	+/-1.6
Public administration	537	+/-225	3.2%	+/-1.3
<b>CLASS OF WORKER</b>				
<b>Civilian employed population 16 years and over</b>	<b>16,830</b>	<b>+/-862</b>	<b>16,830</b>	<b>(X)</b>
Private wage and salary workers	13,584	+/-830	80.7%	+/-2.6
Government workers	2,081	+/-395	12.4%	+/-2.3
Self-employed in own not incorporated business workers	1,110	+/-281	6.6%	+/-1.6
Unpaid family workers	55	+/-50	0.3%	+/-0.3
<b>INCOME AND BENEFITS (IN 2009 INFLATION-ADJUSTED DOLLARS)</b>				
<b>Total households</b>	<b>16,045</b>	<b>+/-608</b>	<b>16,045</b>	<b>(X)</b>
Less than \$10,000	1,225	+/-382	7.6%	+/-2.3
\$10,000 to \$14,999	845	+/-230	5.3%	+/-1.4
\$15,000 to \$24,999	1,705	+/-313	10.6%	+/-1.8
\$25,000 to \$34,999	2,174	+/-406	13.5%	+/-2.6
\$35,000 to \$49,999	2,182	+/-350	13.6%	+/-2.2
\$50,000 to \$74,999	3,190	+/-392	19.9%	+/-2.4
\$75,000 to \$99,999	1,733	+/-360	10.8%	+/-2.3
\$100,000 to \$149,999	1,605	+/-312	10.0%	+/-2.0
\$150,000 to \$199,999	684	+/-209	4.3%	+/-1.3
\$200,000 or more	702	+/-193	4.4%	+/-1.2
Median household income (dollars)	49,324	+/-3,099	(X)	(X)
Mean household income (dollars)	67,519	+/-3,713	(X)	(X)
With earnings	10,297	+/-532	64.2%	+/-2.6
Mean earnings (dollars)	70,979	+/-5,429	(X)	(X)
With Social Security	7,095	+/-535	44.2%	+/-2.7
Mean Social Security income (dollars)	16,278	+/-805	(X)	(X)
With retirement income	3,941	+/-460	24.6%	+/-2.7
Mean retirement income (dollars)	23,241	+/-2,884	(X)	(X)
With Supplemental Security Income	408	+/-141	2.5%	+/-0.9
Mean Supplemental Security Income (dollars)	9,731	+/-2,954	(X)	(X)
With cash public assistance income	144	+/-100	0.9%	+/-0.6
Mean cash public assistance income (dollars)	2,578	+/-1,358	(X)	(X)
With Food Stamp/SNAP benefits in the past 12 months	480	+/-191	3.0%	+/-1.2
<b>Families</b>				
<b>Total families</b>	<b>9,882</b>	<b>+/-465</b>	<b>9,882</b>	<b>(X)</b>
Less than \$10,000	161	+/-122	1.6%	+/-1.2
\$10,000 to \$14,999	307	+/-127	3.1%	+/-1.3
\$15,000 to \$24,999	657	+/-236	6.6%	+/-2.3
\$25,000 to \$34,999	996	+/-295	10.1%	+/-2.9
\$35,000 to \$49,999	1,312	+/-257	13.3%	+/-2.6
\$50,000 to \$74,999	2,493	+/-360	25.2%	+/-3.6
\$75,000 to \$99,999	1,501	+/-310	15.2%	+/-3.1
\$100,000 to \$149,999	1,245	+/-270	12.6%	+/-2.7
\$150,000 to \$199,999	623	+/-204	6.3%	+/-2.0
\$200,000 or more	587	+/-176	5.9%	+/-1.7
Median family income (dollars)	62,243	+/-2,883	(X)	(X)
Mean family income (dollars)	84,096	+/-5,151	(X)	(X)
Per capita income (dollars)	30,110	+/-1,643	(X)	(X)
<b>Nonfamily households</b>				
<b>Total nonfamily households</b>	<b>6,163</b>	<b>+/-648</b>	<b>6,163</b>	<b>(X)</b>
Median nonfamily income (dollars)	26,644	+/-1,909	(X)	(X)
Mean nonfamily income (dollars)	39,064	+/-4,857	(X)	(X)
Median earnings for workers (dollars)	29,495	+/-2,007	(X)	(X)

APPENDIX A. 2007-2009 (American Community Survey), continued

Selected Economic Characteristics	Estimate	Margin of Error	Percent	Margin of Error
	41,676	+/-6,383	(X)	(X)
Median earnings for female full-time, year-round workers (dollars)	31,601	+/-3,236	(X)	(X)
<b>HEALTH INSURANCE COVERAGE</b>				
<b>Civilian Noninstitutionalized Population</b>				
With health insurance coverage	(X)	(X)	(X)	(X)
With private health insurance coverage	(X)	(X)	(X)	(X)
With public health coverage	(X)	(X)	(X)	(X)
No health insurance coverage	(X)	(X)	(X)	(X)
<b>Civilian Noninstitutionalized Population Under 18 years</b>				
No health insurance coverage	(X)	(X)	(X)	(X)
<b>PERCENTAGE OF FAMILIES AND PEOPLE WHOSE INCOME IN THE PAST 12 MONTHS IS BELOW THE POVERTY LEVEL</b>				
All families	4.3%	+/-2.0	(X)	(X)
With related children under 18 years	8.2%	+/-5.2	(X)	(X)
With related children under 5 years only	0.0%	+/-26.7	(X)	(X)
Married couple families	3.1%	+/-1.7	(X)	(X)
With related children under 18 years	5.8%	+/-5.0	(X)	(X)
With related children under 5 years only	0.0%	+/-31.4	(X)	(X)
Families with female householder, no husband present	9.7%	+/-8.3	(X)	(X)
With related children under 18 years	14.8%	+/-13.6	(X)	(X)
With related children under 5 years only	0.0%	+/-100.0	(X)	(X)
All people	9.4%	+/-2.6	(X)	(X)
Under 18 years	11.0%	+/-6.4	(X)	(X)
Related children under 18 years	9.8%	+/-6.2	(X)	(X)
Related children under 5 years	9.5%	+/-9.6	(X)	(X)
Related children 5 to 17 years	9.9%	+/-6.4	(X)	(X)
18 years and over	9.1%	+/-2.2	(X)	(X)
18 to 64 years	9.6%	+/-2.7	(X)	(X)
65 years and over	7.8%	+/-3.0	(X)	(X)
People in families	5.0%	+/-2.5	(X)	(X)
Unrelated individuals 15 years and over	25.1%	+/-5.1	(X)	(X)

Source: U.S. Census Bureau, 2007-2009 American Community Survey

Data are based on a sample and are subject to sampling variability. The degree of uncertainty for an estimate arising from sampling variability is represented through the use of a margin of error. The value shown here is the 90 percent margin of error. The margin of error can be interpreted roughly as providing a 90 percent probability that the interval defined by the estimate minus the margin of error and the estimate plus the margin of error (the lower and upper confidence bounds) contains the true value. In addition to sampling variability, the ACS estimates are subject to nonsampling error (for a discussion of nonsampling variability, see Accuracy of the Data). The effect of nonsampling error is not represented in these tables.

Notes:

- Employment and unemployment estimates may vary from the official labor force data released by the Bureau of Labor Statistics because of differences in survey design and data collection. For guidance on differences in employment and unemployment estimates from different sources go to Labor Force Guidance.
- Workers include members of the Armed Forces and civilians who were at work last week.
- Occupation codes are 4-digit codes and are based on Standard Occupational Classification 2000.
- Industry codes are 4-digit codes and are based on the North American Industry Classification System 2002 and 2007. The 2007 ACS data are coded using NAICS 2002 while the 2008 and 2009 ACS data use NAICS 2007 codes. Categories that differ between 2002 and 2007 NAICS are aggregated so that the 3 years of data are consistent in display and reflect the NAICS 2007 codes. The Industry categories adhere to the guidelines issued in Clarification Memorandum No. 2, "NAICS Alternate Aggregation Structure for Use By U.S. Statistical Agencies," issued by the Office of Management and Budget.
- While the 2007-2009 American Community Survey (ACS) data generally reflect the November 2008 Office of Management and Budget (OMB) definitions of metropolitan and micropolitan statistical areas; in certain instances the names, codes, and boundaries of the principal cities shown in ACS tables may differ from the OMB definitions due to differences in the effective dates of the geographic entities.
- Estimates of urban and rural population, housing units, and characteristics reflect boundaries of urban areas defined based on Census 2000 data. Boundaries for urban areas have not been updated since Census 2000. As a result, data for urban and rural areas from the ACS do not necessarily reflect the results of ongoing urbanization.

Explanation of Symbols:

1. An '\*\*\*' entry in the margin of error column indicates that either no sample observations or too few sample observations were available to compute a standard error and thus the margin of error. A statistical test is not appropriate.
2. An '-' entry in the estimate column indicates that either no sample observations or too few sample observations were available to compute an estimate, or a ratio of medians cannot be calculated because one or both of the median estimates falls in the lowest interval or upper interval of an open-ended distribution.
3. An '-' following a median estimate means the median falls in the lowest interval of an open-ended distribution.
4. An '+' following a median estimate means the median falls in the upper interval of an open-ended distribution.
5. An '\*\*\*\*' entry in the margin of error column indicates that the median falls in the lowest interval or upper interval of an open-ended distribution. A statistical test is not appropriate.
6. An '\*\*\*\*\*' entry in the margin of error column indicates that the estimate is controlled. A statistical test for sampling variability is not appropriate.
7. An 'N' entry in the estimate and margin of error columns indicates that data for this geographic area cannot be displayed because the number of sample cases is too small.
8. An '(X)' means that the estimate is not applicable or not available.

## B. APPENDIX. 2005-2009 CENSUS DATA (American Community Survey)

Selected Economic Characteristics	Estimate	Margin of Error	Percent	Margin of Error
<b>EMPLOYMENT STATUS</b>				
<b>Population 16 years and over</b>	<b>32,059</b>	<b>+/-441</b>	<b>32,059</b>	<b>(X)</b>
In labor force	17,195	+/-662	53.6%	+/-2.0
Civilian labor force	17,195	+/-662	53.6%	+/-2.0
Employed	16,647	+/-682	51.9%	+/-2.1
Unemployed	548	+/-155	1.7%	+/-0.5
Armed Forces	0	+/-136	0.0%	+/-0.1
Not in labor force	14,864	+/-712	46.4%	+/-2.0
<b>Civilian labor force</b>	<b>17,195</b>	<b>+/-662</b>	<b>17,195</b>	<b>(X)</b>
Percent Unemployed	3.2%	+/-0.9	(X)	(X)
<b>Females 16 years and over</b>				
<b>Population 16 years and over</b>	<b>17,340</b>	<b>+/-467</b>	<b>17,340</b>	<b>(X)</b>
In labor force	8,406	+/-465	48.5%	+/-2.4
Civilian labor force	8,406	+/-465	48.5%	+/-2.4
Employed	8,090	+/-485	46.7%	+/-2.4
<b>Own children under 6 years</b>				
<b>Population 16 years and over</b>	<b>1,856</b>	<b>+/-299</b>	<b>1,856</b>	<b>(X)</b>
All parents in family in labor force	1,264	+/-291	68.1%	+/-9.3
<b>Own children 6 to 17 years</b>				
<b>Population 16 years and over</b>	<b>4,813</b>	<b>+/-433</b>	<b>4,813</b>	<b>(X)</b>
All parents in family in labor force	3,402	+/-407	70.7%	+/-5.4
<b>COMMUTING TO WORK</b>				
<b>Workers 16 years and over</b>	<b>16,221</b>	<b>+/-695</b>	<b>16,221</b>	<b>(X)</b>
Car, truck, or van -- drove alone	13,728	+/-670	84.6%	+/-2.3
Car, truck, or van -- carpooled	1,105	+/-297	6.8%	+/-1.8
Public transportation (excluding taxicab)	100	+/-82	0.6%	+/-0.5
Walked	191	+/-136	1.2%	+/-0.8
Other means	384	+/-171	2.4%	+/-1.0
Worked at home	713	+/-161	4.4%	+/-1.0
Mean travel time to work (minutes)	20.5	+/-1.0	(X)	(X)
<b>OCCUPATION</b>				
<b>Civilian employed population 16 years and over</b>	<b>16,647</b>	<b>+/-682</b>	<b>16,647</b>	<b>(X)</b>
Management, professional, and related occupations	7,082	+/-544	42.5%	+/-3.0
Service occupations	3,111	+/-517	18.7%	+/-3.0
Sales and office occupations	4,263	+/-488	25.6%	+/-2.7
Farming, fishing, and forestry occupations	34	+/-32	0.2%	+/-0.2
Construction, extraction, maintenance, and repair occupations	1,261	+/-264	7.6%	+/-1.5
Production, transportation, and material moving occupations	896	+/-241	5.4%	+/-1.4

[http://factfinder.census.gov/servlet/ADPTable?\\_bm=y&-geo\\_id=16000US1253150&-qr\\_name=ACS\\_2...](http://factfinder.census.gov/servlet/ADPTable?_bm=y&-geo_id=16000US1253150&-qr_name=ACS_2...) 8/29/201

APPENDIX B. 2005-2009 (American Community Survey, continued)

Selected Economic Characteristics	Estimate	Margin of Error	Percent	Margin of Error
<b>INDUSTRY</b>				
<b>Civilian employed population 16 years and over</b>	<b>16,647</b>	<b>+/-682</b>	<b>16,647</b>	<b>(X)</b>
Agriculture, forestry, fishing and hunting, and mining	37	+/-36	0.2%	+/-0.2
Construction	1,334	+/-299	8.0%	+/-1.8
Manufacturing	806	+/-231	4.8%	+/-1.4
Wholesale trade	513	+/-192	3.1%	+/-1.1
Retail trade	2,254	+/-337	13.5%	+/-2.0
Transportation and warehousing, and utilities	460	+/-142	2.8%	+/-0.9
Information	232	+/-101	1.4%	+/-0.6
Finance and insurance, and real estate and rental and leasing	1,444	+/-296	8.7%	+/-1.7
Professional, scientific, and management, and administrative and waste management services	1,876	+/-303	11.3%	+/-1.8
Educational services, and health care and social assistance	4,251	+/-415	25.5%	+/-2.5
Arts, entertainment, and recreation, and accommodation and food services	1,902	+/-389	11.4%	+/-2.2
Other services, except public administration	840	+/-233	5.0%	+/-1.4
Public administration	698	+/-178	4.2%	+/-1.0
<b>CLASS OF WORKER</b>				
<b>Civilian employed population 16 years and over</b>	<b>16,647</b>	<b>+/-682</b>	<b>16,647</b>	<b>(X)</b>
Private wage and salary workers	13,321	+/-669	80.0%	+/-2.2
Government workers	2,139	+/-337	12.8%	+/-2.0
Self-employed in own not incorporated business workers	1,136	+/-235	6.8%	+/-1.4
Unpaid family workers	51	+/-46	0.3%	+/-0.3
<b>INCOME AND BENEFITS (IN 2009 INFLATION-ADJUSTED DOLLARS)</b>				
<b>Total households</b>	<b>16,328</b>	<b>+/-409</b>	<b>16,328</b>	<b>(X)</b>
Less than \$10,000	1,076	+/-242	6.6%	+/-1.5
\$10,000 to \$14,999	979	+/-200	6.0%	+/-1.2
\$15,000 to \$24,999	1,983	+/-305	12.1%	+/-1.8
\$25,000 to \$34,999	1,877	+/-269	11.5%	+/-1.6
\$35,000 to \$49,999	2,255	+/-306	13.8%	+/-1.8
\$50,000 to \$74,999	3,191	+/-359	19.5%	+/-2.1
\$75,000 to \$99,999	1,760	+/-247	10.8%	+/-1.5
\$100,000 to \$149,999	1,611	+/-242	9.9%	+/-1.5
\$150,000 to \$199,999	666	+/-169	4.1%	+/-1.0
\$200,000 or more	930	+/-185	5.7%	+/-1.1
Median household income (dollars)	49,951	+/-2,859	(X)	(X)
Mean household income (dollars)	71,492	+/-4,208	(X)	(X)
With earnings	10,618	+/-407	65.0%	+/-2.1
Mean earnings (dollars)	76,544	+/-5,747	(X)	(X)
With Social Security	7,303	+/-357	44.7%	+/-2.0
Mean Social Security income (dollars)	16,346	+/-606	(X)	(X)
With retirement income	4,215	+/-313	25.8%	+/-1.9
Mean retirement income (dollars)	22,194	+/-1,943	(X)	(X)
With Supplemental Security Income	445	+/-146	2.7%	+/-0.9
Mean Supplemental Security Income (dollars)	9,617	+/-1,891	(X)	(X)
With cash public assistance income	107	+/-61	0.7%	+/-0.4
Mean cash public assistance income (dollars)	1,976	+/-1,199	(X)	(X)
With Food Stamp/SNAP benefits in the past 12 months	467	+/-175	2.9%	+/-1.1
<b>Families</b>				
<b>Families</b>	<b>10,339</b>	<b>+/-366</b>	<b>10,339</b>	<b>(X)</b>
Less than \$10,000	165	+/-96	1.6%	+/-0.9
\$10,000 to \$14,999	269	+/-105	2.6%	+/-1.0
\$15,000 to \$24,999	784	+/-190	7.6%	+/-1.8
\$25,000 to \$34,999	916	+/-180	8.9%	+/-1.7
\$35,000 to \$49,999	1,439	+/-228	13.9%	+/-2.2
\$50,000 to \$74,999	2,490	+/-311	24.1%	+/-2.8
\$75,000 to \$99,999	1,556	+/-210	15.0%	+/-1.9
\$100,000 to \$149,999	1,285	+/-214	12.4%	+/-2.1
\$150,000 to \$199,999	621	+/-164	6.0%	+/-1.6
\$200,000 or more	814	+/-171	7.9%	+/-1.7
Median family income (dollars)	65,267	+/-3,731	(X)	(X)
Mean family income (dollars)	89,904	+/-6,180	(X)	(X)
Per capita income (dollars)	31,835	+/-1,694	(X)	(X)

**APPENDIX B. 2005-2009 (American Community Survey, continued)**

Selected Economic Characteristics	Estimate	Margin of Error	Percent	Margin of Error
	5,989	+/-425	5,989	(X)
Median nonfamily income (dollars)	25,611	+/-2,167	(X)	(X)
Mean nonfamily income (dollars)	37,923	+/-3,642	(X)	(X)
Median earnings for workers (dollars)	30,472	+/-1,729	(X)	(X)
Median earnings for male full-time, year-round workers (dollars)	46,564	+/-2,226	(X)	(X)
Median earnings for female full-time, year-round workers (dollars)	34,753	+/-2,518	(X)	(X)
<b>HEALTH INSURANCE COVERAGE</b>				
<b>Civilian Noninstitutionalized Population</b>	(X)	(X)	(X)	(X)
With health insurance coverage	(X)	(X)	(X)	(X)
With private health insurance coverage	(X)	(X)	(X)	(X)
With public health coverage	(X)	(X)	(X)	(X)
No health insurance coverage	(X)	(X)	(X)	(X)
<b>Civilian Noninstitutionalized Population Under 18 years</b>	(X)	(X)	(X)	(X)
No health insurance coverage	(X)	(X)	(X)	(X)
<b>PERCENTAGE OF FAMILIES AND PEOPLE WHOSE INCOME IN THE PAST 12 MONTHS IS BELOW THE POVERTY LEVEL</b>				
All families	4.1%	+/-1.4	(X)	(X)
With related children under 18 years	6.8%	+/-3.2	(X)	(X)
With related children under 5 years only	1.5%	+/-2.4	(X)	(X)
Married couple families	2.4%	+/-1.0	(X)	(X)
With related children under 18 years	3.7%	+/-2.4	(X)	(X)
With related children under 5 years only	2.1%	+/-3.3	(X)	(X)
Families with female householder, no husband present	10.8%	+/-5.9	(X)	(X)
With related children under 18 years	17.3%	+/-10.5	(X)	(X)
With related children under 5 years only	0.0%	+/-41.1	(X)	(X)
All people	8.0%	+/-1.7	(X)	(X)
Under 18 years	8.8%	+/-3.5	(X)	(X)
Related children under 18 years	7.7%	+/-3.5	(X)	(X)
Related children under 5 years	6.8%	+/-4.4	(X)	(X)
Related children 5 to 17 years	7.9%	+/-3.7	(X)	(X)
18 years and over	7.9%	+/-1.5	(X)	(X)
18 to 64 years	8.8%	+/-1.9	(X)	(X)
65 years and over	5.8%	+/-2.0	(X)	(X)
People in families	4.4%	+/-1.6	(X)	(X)
Unrelated individuals 15 years and over	21.9%	+/-3.8	(X)	(X)

Source: U.S. Census Bureau, 2005-2009 American Community Survey

## C. APPENDIX. Claritas Downtown (CRA) Socio Economics

### Pop-Facts: Demographic Trend 2011

Ormond CBD

Polygon 1: N ORCHARD ST AT LINCOLN AVE, ORMOND BEACH, FL 32174, Total

Description	2000 Census	%	2011 Estimate	%	2016 Projection	%
<b>Population by Age</b>	479		425		405	
Age 0 - 4	19	3.97%	18	4.24%	17	4.20%
Age 5 - 9	23	4.80%	19	4.47%	19	4.69%
Age 10 - 14	26	5.43%	18	4.24%	18	4.44%
Age 15 - 17	12	2.51%	13	3.06%	11	2.72%
Age 18 - 20	11	2.30%	13	3.06%	10	2.47%
Age 21 - 24	17	3.53%	15	3.53%	14	3.46%
Age 25 - 34	48	10.02%	43	10.12%	37	9.14%
Age 35 - 44	65	13.57%	49	11.53%	51	12.59%
Age 45 - 54	68	14.20%	58	13.65%	48	11.85%
Age 55 - 64	55	11.48%	65	15.29%	61	15.06%
Age 65 - 74	68	14.20%	56	13.18%	62	15.31%
Age 75 - 84	51	10.65%	40	9.41%	40	9.88%
Age 85 and over	18	3.76%	18	4.24%	18	4.44%
Age 16 and over	408	85.18%	366	86.12%	348	85.93%
Age 18 and over	401	83.72%	357	84.00%	341	84.20%
Age 21 and over	390	81.42%	344	80.94%	331	81.73%
Age 65 and over	136	28.39%	114	26.82%	121	29.88%
<b>Median Age</b>	47.90		49.24		50.41	
<b>Average Age</b>	46.80		47.10		48.00	
<b>Population by Sex</b>	479		425		405	
Male	222	46.35%	200	47.06%	190	46.91%
Female	258	53.86%	225	52.94%	215	53.09%
Male/Female Ratio	0.86		0.89		0.88	

APPENDIX C. Claritas Downtown (CRA) Socio Economics, continued

**Pop-Facts: Demographic Trend 2011**

Ormond CBD

Polygon 1: N ORCHARD ST AT LINCOLN AVE, ORMOND BEACH, FL 32174, Total

Description	2000 Census	%	2011 Estimate	%	2016 Projection	%
<b>Pop. by Single Race Class. and Hispanic or Latino</b>						
<b>Hispanic or Latino:</b>	13		15		14	
White Alone	11	84.62%	13	86.67%	12	85.71%
Black or African American Alone	1	7.69%	1	6.67%	1	7.14%
American Indian and Alaska Native Alone	0	0.00%	0	0.00%	0	0.00%
Asian Alone	0	0.00%	0	0.00%	0	0.00%
Native Hawaiian and Other Pacific Islander Alone	0	0.00%	0	0.00%	0	0.00%
Some Other Race Alone	1	7.69%	0	0.00%	0	0.00%
Two or More Races	0	0.00%	0	0.00%	0	0.00%
<b>Not Hispanic or Latino:</b>	466		410		391	
White Alone	431	92.49%	381	92.93%	364	93.09%
Black or African American Alone	25	5.36%	18	4.39%	15	3.84%
American Indian and Alaska Native Alone	1	0.21%	1	0.24%	2	0.51%
Asian Alone	4	0.86%	5	1.22%	6	1.53%
Native Hawaiian and Other Pacific Islander Alone	0	0.00%	0	0.00%	0	0.00%
Some Other Race Alone	0	0.00%	0	0.00%	0	0.00%
Two or More Races	4	0.86%	5	1.22%	5	1.28%
<b>Households by Age of Householder</b>						
	238		210		201	
Householder Under 25 Years	7	2.94%	7	3.33%	6	2.99%
Householder 25 to 34 Years	21	8.82%	19	9.05%	16	7.96%
Householder 35 to 44 Years	38	15.97%	29	13.81%	30	14.93%
Householder 45 to 54 Years	41	17.23%	35	16.67%	28	13.93%
Householder 55 to 64 Years	32	13.45%	38	18.10%	35	17.41%
Householder 65 to 74 Years	47	19.75%	39	18.57%	43	21.39%
Householder 75 to 84 Years	38	15.97%	30	14.29%	29	14.43%
Householder 85 Years and over	14	5.88%	14	6.67%	14	6.97%
<b>Median Age of Householder</b>						
	58.79		59.10		60.83	

APPENDIX C. Claritas Downtown (CRA) Socio Economics, continued

**Pop-Facts: Demographic Trend 2011**

Ormond CBD

Polygon 1: N ORCHARD ST AT LINCOLN AVE, ORMOND BEACH, FL 32174, Total

Description	2000 Census	%	2011 Estimate	%	2016 Projection	%
<b>Households by Household Income</b>	248		210		201	
Income Less than \$15,000	47	18.95%	33	15.71%	32	15.92%
Income \$15,000 - \$24,999	46	18.55%	37	17.62%	35	17.41%
Income \$25,000 - \$34,999	25	10.08%	23	10.95%	22	10.95%
Income \$35,000 - \$49,999	57	22.98%	50	23.81%	47	23.38%
Income \$50,000 - \$74,999	42	16.94%	40	19.05%	39	19.40%
Income \$75,000 - \$99,999	16	6.45%	10	4.76%	10	4.98%
Income \$100,000 - \$124,999			8	3.81%	7	3.48%
Income \$100,000 - \$149,999	5	2.02%				
Income \$125,000 - \$149,999			1	0.48%	2	1.00%
Income \$150,000 - \$199,999			3	1.43%	3	1.49%
Income \$150,000 - \$249,999	7	2.82%				
Income \$200,000 - \$499,999			4	1.90%	4	1.99%
Income \$250,000 - \$499,999	3	1.21%				
Income \$500,000 or more	0	0.00%	0	0.00%	0	0.00%
<b>Average Household Income</b>	\$45,162		\$48,909		\$49,635	
<b>Median Household Income</b>	\$36,412		\$38,585		\$38,813	
<b>Per Capita Income</b>	\$22,771		\$24,251		\$24,657	
<b>2011 Median HH Inc. by Single Race Class</b>						
White Alone	36,332		38,732		39,039	
Black or African American Alone	14,999		17,838		18,665	
American Indian and Alaska Native Alone	62,500		14,999		14,999	
Asian Alone	200,001		95,485		80,412	
Native Hawaiian and Other Pacific Islander Alone	0		62,500		62,500	
Some Other Race Alone	0		43,347		43,347	
Two or More Races	75,723		88,384		64,987	
Hispanic or Latino	14,999		40,464		42,395	
Not Hispanic or Latino	36,429		38,556		38,721	

Some fields are intentionally left blank due to lack of data in those particular data vintages.

APPENDIX C. DOWNTOWN (CRA) HOUSEHOLD TRENDS

**Household Trend 2011**  
Ormond CBD

Polygon 1: N ORCHARD ST AT LINCOLN AVE, ORMOND BEACH, FL 32174, Total

Description	2000 Census	2011 Estimate	%Change 2000-2011	2016 Projection	%Change 2011-2016
<b>Universe Totals</b>					
Population	479	425	-11.27%	405	-4.71%
Households	238	210	-11.76%	201	-4.29%
Families	121	105	-13.22%	100	-4.76%
Housing Units	334	315	-5.69%	300	-4.76%
Group Quarters Population	1	1	0.00%	1	0.00%
Average Household Size	2.01	2.02		2.01	

<b>Income Totals</b>					
Aggregate(\$MM) Household Income	0.00	0.00	-7.93%	0.00	-3.04%
Per Capita(\$)	22,771	24,251	6.39%	24,657	1.76%

Description	2000 Census	%	2011 Estimate	%	2016 Projection	%
<b>Total Household Income</b>						
Income Less than \$15,000	47	18.95%	33	15.71%	32	15.92%
Income \$15,000 - \$24,999	46	18.55%	37	17.62%	35	17.41%
Income \$25,000 - \$34,999	25	10.08%	23	10.95%	22	10.95%
Income \$35,000 - \$49,999	57	22.98%	50	23.81%	47	23.38%
Income \$50,000 - \$74,999	42	16.94%	40	19.05%	39	19.40%
Income \$75,000 - \$99,999	16	6.45%	10	4.76%	10	4.98%
Income \$100,000 - \$124,999			8	3.81%	7	3.48%
Income \$100,000 - \$149,999	5	2.02%				
Income \$125,000 - \$149,999			1	0.48%	2	1.00%
Income \$150,000 - \$199,999			3	1.43%	3	1.49%
Income \$150,000 - \$249,999	7	2.82%				
Income \$200,000 - \$499,999			4	1.90%	4	1.99%
Income \$250,000 - \$499,999	3	1.21%				
Income \$500,000 or more	0	0.00%	0	0.00%	0	0.00%
<b>Average Household Income</b>	\$45,162		\$48,909		\$49,635	
<b>Median Household Income</b>	\$36,412		\$38,585		\$38,813	

APPENDIX C. DOWNTOWN (CRA) HOUSEHOLD TRENDS, CONTINUED

Household Trend 2011

Ormond CBD

Polygon 1: N ORCHARD ST AT LINCOLN AVE, ORMOND BEACH, FL 32174, Total

Description	2000 Census	%	2011 Estimate	%	2016 Projection	%
<b>Median HH Inc. by Single Race Class</b>						
White Alone	36,332		38,732		39,039	
Black or African American Alone	14,999		17,838		18,665	
Amer Indian and Alaska Native Alone	62,500		14,999		14,999	
Asian Alone	200,001		95,485		80,412	
Native Hawaiian and Other Pacific Island	0		62,500		62,500	
Some Other Race Alone	0		43,347		43,347	
Two or More Races	75,723		88,384		64,987	
Hispanic or Latino	14,999		40,464		42,395	
Not Hispanic or Latino	36,429		38,556		38,721	
<b>Households by Household Type and Size</b>						
<b>Nonfamily Households</b>	117		106		101	
1-person household	95	81.20%	84	79.25%	81	80.20%
2-person household	19	16.24%	18	16.98%	17	16.83%
3-person household	3	2.56%	2	1.89%	2	1.98%
4-person household	0	0.00%	0	0.00%	0	0.00%
5-person household	1	0.85%	1	0.94%	1	0.99%
6-person household	0	0.00%	0	0.00%	0	0.00%
7 or more person household	0	0.00%	0	0.00%	0	0.00%
<b>Family Households</b>	121		105		100	
2-person household	68	56.20%	58	55.24%	55	55.00%
3-person household	28	23.14%	24	22.86%	23	23.00%
4-person household	15	12.40%	13	12.38%	13	13.00%
5-person household	7	5.79%	6	5.71%	6	6.00%
6-person household	2	1.65%	2	1.90%	2	2.00%
7 or more person household	1	0.83%	1	0.95%	1	1.00%

Some fields are intentionally left blank due to lack of data in those particular data vintages.

## D. APPENDIX. RETAIL GAP ANALYSIS – 3 MILE RADIUS

### RMP Opportunity Gap - Retail Stores

#### Retail GAP

Radius 1: N YONGE ST AT W GRANADA BLVD, ORMOND BEACH, FL 32174, 0.00 - 3.00 Miles, Total

	2010 Demand (Consumer Expenditures)	2010 Supply (Retail Sales)	Opportunity Gap/Surplus
Total Retail Sales Incl Eating and Drinking Places	733,038,988	757,085,083	(24,046,095)
Motor Vehicle and Parts Dealers-441	103,328,838	40,586,599	62,742,239
Automotive Dealers-4411	84,758,562	22,034,696	62,723,866
Other Motor Vehicle Dealers-4412	7,637,788	5,531,862	2,105,926
Automotive Parts/Access, Tire Stores-4413	10,932,488	13,020,042	(2,087,554)
Furniture and Home Furnishings Stores-442	15,677,316	27,069,249	(11,391,933)
Furniture Stores-4421	8,364,916	20,899,816	(12,534,900)
Home Furnishing Stores-4422	7,312,400	6,169,432	1,142,968
Electronics and Appliance Stores-443	16,156,207	9,634,782	6,521,425
Appliances, TVs, Electronics Stores-44311	12,337,599	8,312,488	4,025,111
Household Appliances Stores-443111	2,944,753	534,530	2,410,223
Radio, Television, Electronics Stores-443112	9,392,846	7,777,957	1,614,889
Computer and Software Stores-44312	3,178,092	1,322,294	1,855,798
Camera and Photographic Equipment Stores-44313	640,516	0	640,516
Building Material, Garden Equip Stores -444	76,378,276	87,584,118	(11,205,842)
Building Material and Supply Dealers-4441	70,051,347	86,436,348	(16,385,001)
Home Centers-44411	29,982,955	35,539,463	(5,556,508)
Paint and Wallpaper Stores-44412	1,645,193	2,492,662	(847,469)
Hardware Stores-44413	6,437,733	3,281,978	3,155,755
Other Building Materials Dealers-44419	31,985,466	45,122,245	(13,136,779)
Building Materials, Lumberyards-444191	12,686,814	17,652,495	(4,965,681)
Lawn, Garden Equipment, Supplies Stores-4442	6,326,930	1,147,770	5,179,160
Outdoor Power Equipment Stores-44421	938,094	788,497	149,597
Nursery and Garden Centers-44422	5,388,835	359,274	5,029,561
Food and Beverage Stores-445	104,571,260	201,246,554	(96,675,294)
Grocery Stores-4451	94,453,580	190,928,559	(96,474,979)
Supermarkets, Grocery (Ex Conv) Stores-44511	89,634,169	185,416,280	(95,782,111)
Convenience Stores-44512	4,819,411	5,512,279	(692,868)
Specialty Food Stores-4452	3,107,819	2,583,274	524,545
Beer, Wine and Liquor Stores-4453	7,009,861	7,734,721	(724,860)
Health and Personal Care Stores-446	57,105,419	46,482,588	10,622,831
Pharmacies and Drug Stores-44611	49,969,647	36,451,545	13,518,102
Cosmetics, Beauty Supplies, Perfume Stores-44612	2,108,276	809,170	1,299,106
Optical Goods Stores-44613	1,390,834	700,136	690,698
Other Health and Personal Care Stores-44619	3,636,662	8,521,738	(4,885,076)

APPENDIX D. RETAIL GAP ANALYSIS – 3 MILE RADIUS

RMP Opportunity Gap - Retail Stores

Retail GAP

Radius 1: NYONGE ST AT W GRANADA BLVD, ORMOND BEACH, FL 32174, 0.00 - 3.00 Miles, Total

	2010 Demand (Consumer Expenditures)	2010 Supply (Retail Sales)	Opportunity Gap/Surplus
Gasoline Stations-447	64,042,656	33,479,499	30,563,157
Gasoline Stations With Conv Stores-44711	48,253,069	30,280,183	17,972,886
Other Gasoline Stations-44719	15,789,587	3,199,317	12,590,270
Clothing and Clothing Accessories Stores-448	30,377,910	40,697,164	(10,319,254)
Clothing Stores-4481	21,246,063	32,424,631	(11,178,568)
Men's Clothing Stores-44811	1,372,374	784,366	588,008
Women's Clothing Stores-44812	5,130,362	4,323,070	807,292
Childrens, Infants Clothing Stores-44813	1,197,203	286,404	910,799
Family Clothing Stores-44814	11,559,259	24,036,619	(12,477,360)
Clothing Accessories Stores-44815	510,989	690,829	(179,840)
Other Clothing Stores-44819	1,475,877	2,303,343	(827,466)
Shoe Stores-4482	4,134,246	3,431,183	703,063
Jewelry, Luggage, Leather Goods Stores-4483	4,997,600	4,841,350	156,250
Jewelry Stores-44831	4,618,200	3,670,759	947,441
Luggage and Leather Goods Stores-44832	379,401	1,170,591	(791,190)
Sporting Goods, Hobby, Book, Music Stores-451	13,225,950	9,086,975	4,138,975
Sporting Goods, Hobby, Musical Inst Stores-4511	9,311,760	8,259,842	1,051,918
Sporting Goods Stores-45111	4,524,858	1,981,964	2,542,894
Hobby, Toys and Games Stores-45112	3,169,724	1,205,962	1,963,762
Sew/Needlework/Piece Goods Stores-45113	749,103	657,008	92,095
Musical Instrument and Supplies Stores-45114	868,076	4,414,907	(3,546,831)
Book, Periodical and Music Stores-4512	3,914,190	827,133	3,087,057
Book Stores and News Dealers-45121	2,639,543	0	2,639,543
Book Stores-451211	2,475,446	0	2,475,446
News Dealers and Newsstands-451212	164,098	0	164,098
Pre-recorded Tapes, CDs, Record Stores-45122	1,274,647	827,133	447,514
General Merchandise Stores-452	100,826,038	103,125,430	(2,299,392)
Department Stores Excl Leased Depts-4521	47,036,661	38,830,229	8,206,432
Other General Merchandise Stores-4529	53,789,377	64,295,200	(10,505,823)
Miscellaneous Store Retailers-453	19,969,892	15,048,348	4,921,544
Florists-4531	1,480,138	739,291	740,847
Office Supplies, Stationery, Gift Stores-4532	7,654,018	6,996,710	657,308
Office Supplies and Stationery Stores-45321	4,390,731	333,826	4,056,905
Gift, Novelty and Souvenir Stores-45322	3,263,287	6,662,884	(3,399,597)
Used Merchandise Stores-4533	1,435,478	1,775,411	(339,933)
Other Miscellaneous Store Retailers-4539	9,400,258	5,536,936	3,863,322
Non-Store Retailers-454	54,769,773	7,529,384	47,240,389
Foodservice and Drinking Places-722	76,609,451	135,514,394	(58,904,943)
Full-Service Restaurants-7221	34,391,107	66,812,334	(32,421,227)

**APPENDIX D. RETAIL GAP ANALYSIS – 3 MILE RADIUS**

**RMP Opportunity Gap - Retail Stores**

Retail GAP

Radius 1: N YONGE ST AT W GRANADA BLVD, ORMOND BEACH, FL 32174, 0.00 - 3.00 Miles, Total

	2010 Demand (Consumer Expenditures)	2010 Supply (Retail Sales)	Opportunity Gap/Surplus
Limited-Service Eating Places-7222	32,018,756	62,266,094	(30,247,338)
Special Foodservices-7223	6,304,184	2,983,596	3,320,588
Drinking Places -Alcoholic Beverages-7224	3,895,405	3,452,369	443,036
GAFO *	183,917,440	196,610,309	(12,692,869)
General Merchandise Stores-452	100,826,038	103,125,430	(2,299,392)
Clothing and Clothing Accessories Stores-448	30,377,910	40,697,164	(10,319,254)
Furniture and Home Furnishings Stores-442	15,677,316	27,069,249	(11,391,933)
Electronics and Appliance Stores-443	16,156,207	9,634,782	6,521,425
Sporting Goods, Hobby, Book, Music Stores-451	13,225,950	9,086,975	4,138,975
Office Supplies, Stationery, Gift Stores-4532	7,654,018	6,996,710	657,308

APPENDIX D. RETAIL GAP ANALYSIS – 5 MILE RADIUS

RMP Opportunity Gap - Retail Stores

Retail GAP

Radius 2: N YONGE ST AT W GRANADA BLVD, ORMOND BEACH, FL 32174, 0.00 - 5.00 Miles, Total

	2010 Demand (Consumer Expenditures)	2010 Supply (Retail Sales)	Opportunity Gap /Surplus
Total Retail Sales Incl Eating and Drinking Places	1,246,116,507	1,540,149,556	(294,033,049)
Motor Vehicle and Parts Dealers-441	174,614,192	344,142,132	(169,527,940)
Automotive Dealers-4411	143,256,799	293,911,893	(150,655,094)
Other Motor Vehicle Dealers-4412	13,225,702	26,213,899	(12,988,197)
Automotive Parts/Accsrs, Tire Stores-4413	18,131,691	24,016,339	(5,884,648)
Furniture and Home Furnishings Stores-442	26,116,241	35,708,296	(9,592,055)
Furniture Stores-4421	13,933,296	26,494,753	(12,561,457)
Home Furnishing Stores-4422	12,182,945	9,213,543	2,969,402
Electronics and Appliance Stores-443	27,368,592	28,583,653	(1,215,061)
Appliances, TVs, Electronics Stores-44311	20,940,030	25,083,849	(4,143,819)
Household Appliances Stores-443111	4,958,590	10,446,521	(5,487,931)
Radio, Television, Electronics Stores-443112	15,981,440	14,637,328	1,344,112
Computer and Software Stores-44312	5,373,027	2,167,767	3,205,260
Camera and Photographic Equipment Stores-44313	1,055,535	1,332,038	(276,503)
Building Material, Garden Equip Stores -444	127,150,878	128,274,410	(1,123,532)
Building Material and Supply Dealers-4441	116,402,105	126,006,036	(9,603,931)
Home Centers-44411	49,995,821	41,210,249	8,785,572
Paint and Wallpaper Stores-44412	2,704,823	2,519,562	185,261
Hardware Stores-44413	10,869,003	5,090,446	5,778,557
Other Building Materials Dealers-44419	52,832,458	77,185,779	(24,353,321)
Building Materials, Lumberyards-444191	20,949,477	30,196,228	(9,246,751)
Lawn, Garden Equipment, Supplies Stores-4442	10,748,773	2,268,375	8,480,398
Outdoor Power Equipment Stores-44421	1,610,041	1,014,208	595,833
Nursery and Garden Centers-44422	9,138,732	1,254,167	7,884,565
Food and Beverage Stores-445	179,567,033	259,766,224	(80,199,191)
Grocery Stores-4451	162,374,516	243,035,675	(80,661,159)
Supermarkets, Grocery (Ex Conv) Stores-44511	154,050,424	231,950,834	(77,900,410)
Convenience Stores-44512	8,324,093	11,084,841	(2,760,748)
Specialty Food Stores-4452	5,367,636	5,147,173	220,463
Beer, Wine and Liquor Stores-4453	11,824,880	11,583,375	241,505
Health and Personal Care Stores-446	94,783,149	74,843,514	19,939,635
Pharmacies and Drug Stores-44611	82,883,966	55,755,356	27,128,610
Cosmetics, Beauty Supplies, Perfume Stores-44612	3,486,070	1,973,062	1,513,008
Optical Goods Stores-44613	2,372,488	1,324,115	1,048,373
Other Health and Personal Care Stores-44619	6,040,625	15,790,980	(9,750,355)

APPENDIX D. RETAIL GAP ANALYSIS – 5 MILE RADIUS

RMP Opportunity Gap - Retail Stores

Retail GAP

Radius 2: N YONGE ST AT W GRANADA BLVD, ORMOND BEACH, FL 32174, 0.00 - 5.00 Miles, Total

	2010 Demand (Consumer Expenditures)	2010 Supply (Retail Sales)	Opportunity Gap/Surplus
Gasoline Stations-447	111,405,638	102,526,170	8,879,468
Gasoline Stations With Conv Stores-44711	83,931,869	95,405,776	(11,473,907)
Other Gasoline Stations-44719	27,473,769	7,120,393	20,353,376
Clothing and Clothing Accessories Stores-448	53,079,205	64,087,860	(11,008,655)
Clothing Stores-4481	37,315,667	46,663,829	(9,348,162)
Men's Clothing Stores-44811	2,419,253	1,956,391	462,862
Women's Clothing Stores-44812	8,984,312	6,683,933	2,300,379
Childrens, Infants Clothing Stores-44813	2,127,017	373,776	1,753,241
Family Clothing Stores-44814	20,324,534	29,137,038	(8,812,504)
Clothing Accessories Stores-44815	888,782	1,864,734	(975,952)
Other Clothing Stores-44819	2,571,768	6,647,957	(4,076,189)
Shoe Stores-4482	7,449,452	4,847,974	2,601,478
Jewelry, Luggage, Leather Goods Stores-4483	8,314,086	12,576,056	(4,261,970)
Jewelry Stores-44831	7,667,318	5,542,652	2,124,666
Luggage and Leather Goods Stores-44832	646,768	7,033,404	(6,386,636)
Sporting Goods, Hobby, Book, Music Stores-451	22,517,398	15,962,163	6,555,235
Sporting Goods, Hobby, Musical Inst Stores-4511	15,898,974	10,555,314	5,343,660
Sporting Goods Stores-45111	7,770,842	3,107,192	4,663,650
Hobby, Toys and Games Stores-45112	5,418,677	2,308,534	3,110,143
Sew/Needlework/Piece Goods Stores-45113	1,239,231	701,677	537,554
Musical Instrument and Supplies Stores-45114	1,470,225	4,437,910	(2,967,685)
Book, Periodical and Music Stores-4512	6,618,423	5,406,850	1,211,573
Book Stores and News Dealers-45121	4,451,026	3,543,554	907,472
Book Stores-451211	4,169,913	3,543,554	626,359
News Dealers and Newsstands-45122	281,113	0	281,113
Prerecorded Tapes, CDs, Record Stores-45122	2,167,397	1,863,296	304,101
General Merchandise Stores-452	173,072,162	180,179,105	(7,106,943)
Department Stores Excl Leased Depts-4521	80,890,107	54,932,345	25,957,762
Other General Merchandise Stores-4529	92,182,055	125,246,760	(33,064,705)
Miscellaneous Store Retailers-453	34,004,398	41,319,778	(7,315,380)
Florists-4531	2,458,308	1,118,627	1,339,681
Office Supplies, Stationery, Gift Stores-4532	12,816,690	27,764,074	(14,947,384)
Office Supplies and Stationery Stores-45321	7,299,312	16,559,312	(9,260,000)
Gift, Novelty and Souvenir Stores-45322	5,517,378	11,204,762	(5,687,384)
Used Merchandise Stores-4533	2,463,983	3,758,028	(1,294,045)
Other Miscellaneous Store Retailers-4539	16,265,417	8,679,049	7,586,368
Non-Store Retailers-454	92,481,514	31,150,476	61,331,038
Foodservice and Drinking Places-722	129,956,106	233,605,776	(103,649,670)
Full-Service Restaurants-7221	58,262,941	104,018,273	(45,755,332)

**APPENDIX D. RETAIL GAP ANALYSIS – 5 MILE RADIUS**

**RMP Opportunity Gap - Retail Stores**

Retail GAP

**Radius 2: NYONGE ST AT W GRANADA BLVD, ORMOND BEACH, FL 32174, 0.00 - 5.00 Miles, Total**

	<b>2010 Demand (Consumer Expenditures)</b>	<b>2010 Supply (Retail Sales)</b>	<b>Opportunity Gap/Surplus</b>
Limited-Service Eating Places-7222	54,388,059	101,000,965	(46,612,906)
Special Foodservices-7223	10,693,734	11,363,390	(669,656)
Drinking Places -Alcoholic Beverages-7224	6,611,373	17,223,148	(10,611,775)
<b>GAFO *</b>	<b>314,970,288</b>	<b>352,285,151</b>	<b>(37,314,863)</b>
General Merchandise Stores-452	173,072,162	180,179,105	(7,106,943)
Clothing and Clothing Accessories Stores-448	53,079,205	64,087,860	(11,008,655)
Furniture and Home Furnishings Stores-442	26,116,241	35,708,296	(9,592,055)
Electronics and Appliance Stores-443	27,368,592	28,583,653	(1,215,061)
Sporting Goods, Hobby, Book, Music Stores-451	22,517,398	15,962,163	6,555,235
Office Supplies, Stationery, Gift Stores-4532	12,816,690	27,764,074	(14,947,384)

APPENDIX D. RETAIL GAP ANALYSIS – 10 MILE RADIUS

RMP Opportunity Gap - Retail Stores

Retail GAP

Radius 3: N YONGE ST AT W GRANADA BLVD, ORMOND BEACH, FL 32174, 0.00 - 10.00 Miles, Total

	2010 Demand (Consumer Expenditures)	2010 Supply (Retail Sales)	Opportunity Gap/Surplus
Total Retail Sales Incl Eating and Drinking Places	2,314,135,437	3,206,365,670	(892,230,233)
Motor Vehicle and Parts Dealers-441	324,906,154	507,528,275	(182,622,121)
Automotive Dealers-4411	267,779,747	407,208,142	(139,428,395)
Other Motor Vehicle Dealers-4412	23,658,516	53,409,963	(29,751,447)
Automotive Parts/Access, Tire Stores-4413	33,467,891	46,910,169	(13,442,278)
Furniture and Home Furnishings Stores-442	47,488,415	74,043,733	(26,555,318)
Furniture Stores-4421	25,273,954	47,073,394	(21,799,440)
Home Furnishing Stores-4422	22,214,461	26,970,340	(4,755,879)
Electronics and Appliance Stores-443	51,814,707	111,880,592	(60,065,885)
Appliances, TVs, Electronics Stores-44311	39,553,556	99,345,366	(59,791,810)
Household Appliances Stores-443111	9,168,026	21,205,933	(12,037,907)
Radio, Television, Electronics Stores-443112	30,385,530	78,139,433	(47,753,903)
Computer and Software Stores-44312	10,308,750	9,033,221	1,275,529
Camera and Photographic Equipment Stores-44313	1,952,402	3,502,005	(1,549,603)
Building Material, Garden Equip Stores -444	231,268,726	229,742,552	1,526,174
Building Material and Supply Dealers-4441	211,657,322	225,649,153	(13,991,831)
Home Centers-44411	91,070,979	84,609,673	6,461,306
Paint and Wallpaper Stores-44412	4,876,470	12,931,910	(8,055,440)
Hardware Stores-44413	19,930,867	11,210,571	8,720,296
Other Building Materials Dealers-44419	95,779,007	116,896,998	(21,117,991)
Building Materials, Lumberyards-444191	38,336,416	45,731,858	(7,395,442)
Lawn, Garden Equipment, Supplies Stores-4442	19,611,403	4,093,399	15,518,004
Outdoor Power Equipment Stores-44421	2,874,290	1,643,752	1,230,538
Nursery and Garden Centers-44422	16,737,113	2,449,648	14,287,465
Food and Beverage Stores-445	333,021,950	434,491,898	(101,469,948)
Grocery Stores-4451	300,499,272	405,852,151	(105,352,879)
Supermarkets, Grocery (Ex Conv) Stores-44511	284,942,835	385,269,275	(100,326,440)
Convenience Stores-44512	15,556,437	20,582,876	(5,026,439)
Specialty Food Stores-4452	9,917,331	9,971,277	(53,946)
Beer, Wine and Liquor Stores-4453	22,605,347	18,668,470	3,936,877
Health and Personal Care Stores-446	172,947,967	150,831,141	22,116,826
Pharmacies and Drug Stores-44611	151,324,755	118,255,919	33,068,836
Cosmetics, Beauty Supplies, Perfume Stores-44612	6,350,184	5,123,140	1,227,044
Optical Goods Stores-44613	4,249,262	6,296,182	(2,046,920)
Other Health and Personal Care Stores-44619	11,023,765	21,155,900	(10,132,135)

APPENDIX D. RETAIL GAP ANALYSIS – 10 MILE RADIUS

RMP Opportunity Gap - Retail Stores

Retail GAP

Radius 3: N YONGE ST AT W GRANADA BLVD, ORMOND BEACH, FL 32174, 0.00 - 10.00 Miles, Total

	2010 Demand (Consumer Expenditures)	2010 Supply (Retail Sales)	Opportunity Gap/Surplus
Gasoline Stations-447	209,205,999	176,225,455	32,980,544
Gasoline Stations With Conv Stores-44711	157,562,294	164,049,084	(6,486,790)
Other Gasoline Stations-44719	51,643,705	12,176,371	39,467,334
Clothing and Clothing Accessories Stores-448	98,913,594	200,028,448	(101,114,854)
Clothing Stores-4481	69,403,446	155,659,543	(86,256,097)
Men's Clothing Stores-44811	4,546,297	5,439,670	(893,373)
Women's Clothing Stores-44812	16,743,859	16,782,630	(38,771)
Childrens, Infants Clothing Stores-44813	3,860,688	2,874,995	985,693
Family Clothing Stores-44814	37,810,549	114,466,957	(76,656,408)
Clothing Accessories Stores-44815	1,658,324	3,563,062	(1,904,738)
Other Clothing Stores-44819	4,783,730	12,532,230	(7,748,500)
Shoe Stores-4482	13,994,981	18,040,553	(4,045,572)
Jewelry, Luggage, Leather Goods Stores-4483	15,515,167	26,328,352	(10,813,185)
Jewelry Stores-44831	14,312,841	18,300,573	(3,987,732)
Luggage and Leather Goods Stores-44832	1,202,326	8,027,779	(6,825,453)
Sporting Goods, Hobby, Book, Music Stores-451	43,074,136	50,484,922	(7,410,786)
Sporting Goods, Hobby, Musical Inst Stores-4511	29,553,162	27,853,097	1,700,065
Sporting Goods Stores-45111	14,425,018	8,971,943	5,453,075
Hobby, Toys and Games Stores-45112	10,097,591	11,431,279	(1,333,688)
Sew/Needlework/Piece Goods Stores-45113	2,249,525	1,182,963	1,066,562
Musical Instrument and Supplies Stores-45114	2,781,027	6,266,912	(3,485,885)
Book, Periodical and Music Stores-4512	13,520,974	22,631,824	(9,110,850)
Book Stores and News Dealers-45121	9,373,248	19,200,434	(9,827,186)
Book Stores-451211	8,837,503	19,200,434	(10,362,931)
News Dealers and Newsstands-451212	535,744	0	535,744
Prerecorded Tapes, CDs, Record Stores-45122	4,147,727	3,431,390	716,337
General Merchandise Stores-452	320,246,342	606,227,241	(285,980,899)
Department Stores Excl Leased Depts-4521	149,540,268	179,725,730	(30,185,462)
Other General Merchandise Stores-4529	170,706,074	426,501,511	(255,795,437)
Miscellaneous Store Retailers-453	63,285,800	107,062,196	(43,776,396)
Florists-4531	4,461,723	2,567,175	1,894,548
Office Supplies, Stationery, Gift Stores-4532	23,905,522	65,388,691	(41,483,169)
Office Supplies and Stationery Stores-45321	13,631,778	40,050,370	(26,418,592)
Gift, Novelty and Souvenir Stores-45322	10,273,744	25,338,321	(15,064,577)
Used Merchandise Stores-4533	4,685,344	6,237,419	(1,552,075)
Other Miscellaneous Store Retailers-4539	30,233,210	32,868,911	(2,635,701)
Non-Store Retailers-454	172,518,263	81,747,476	90,770,787
Foodservice and Drinking Places-722	245,443,386	476,071,742	(230,628,356)
Full-Service Restaurants-7221	110,256,054	210,198,574	(99,942,520)

**APPENDIX D. RETAIL GAP ANALYSIS – 10 MILE RADIUS**

**RMP Opportunity Gap - Retail Stores**

**Retail GAP**

**Radius 3: N YONGE ST AT W GRANADA BLVD, ORMOND BEACH, FL 32174, 0.00 - 10.00 Miles, Total**

	<b>2010 Demand (Consumer Expenditures)</b>	<b>2010 Supply (Retail Sales)</b>	<b>Opportunity Gap/Surplus</b>
Limited-Service Eating Places-7222	102,462,671	210,077,199	(107,614,528)
Special Foodservices-7223	20,127,959	22,755,366	(2,627,407)
Drinking Places -Alcoholic Beverages-7224	12,596,702	33,040,603	(20,443,901)
<b>GAFO *</b>	<b>585,442,717</b>	<b>1,108,053,626</b>	<b>(522,610,909)</b>
General Merchandise Stores-452	320,246,342	606,227,241	(285,980,899)
Clothing and Clothing Accessories Stores-448	98,913,594	200,028,448	(101,114,854)
Furniture and Home Furnishings Stores-442	47,488,415	74,043,733	(26,555,318)
Electronics and Appliance Stores-443	51,814,707	111,880,592	(60,065,885)
Sporting Goods, Hobby, Book, Music Stores-451	43,074,136	50,484,922	(7,410,786)
Office Supplies, Stationery, Gift Stores-4532	23,905,522	65,388,691	(41,483,169)

\* GAFO (General merchandise, Apparel, Furniture and Other) represents sales at stores that sell merchandise normally sold in department stores. This category is not included in Total Retail Sales Including Eating and Drinking Places.

Claritas' RMP data is derived from two major sources of information. The demand data is derived from the Consumer Expenditure Survey (CE Survey), which is fielded by the U.S. Bureau of Labor Statistics (BLS). The supply data is derived from the Census of Retail Trade (CRT), which is made available by the U.S. Census. Additional data sources are incorporated to create both supply and demand estimates.

The difference between demand and supply represents the opportunity gap or surplus available for each retail outlet in the specified reporting geography. When the demand is greater than (less than) the supply, there is an opportunity gap (surplus) for that retail outlet. For example, a positive value signifies an opportunity gap, while a negative value signifies a surplus.