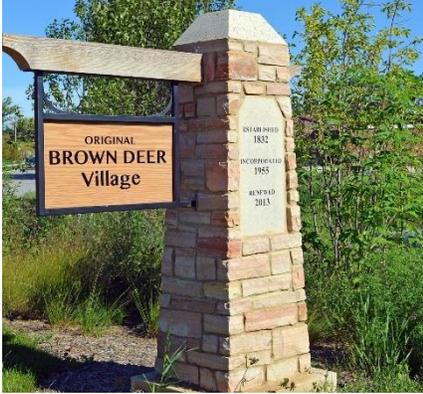


# The Village of Brown Deer Market Analysis

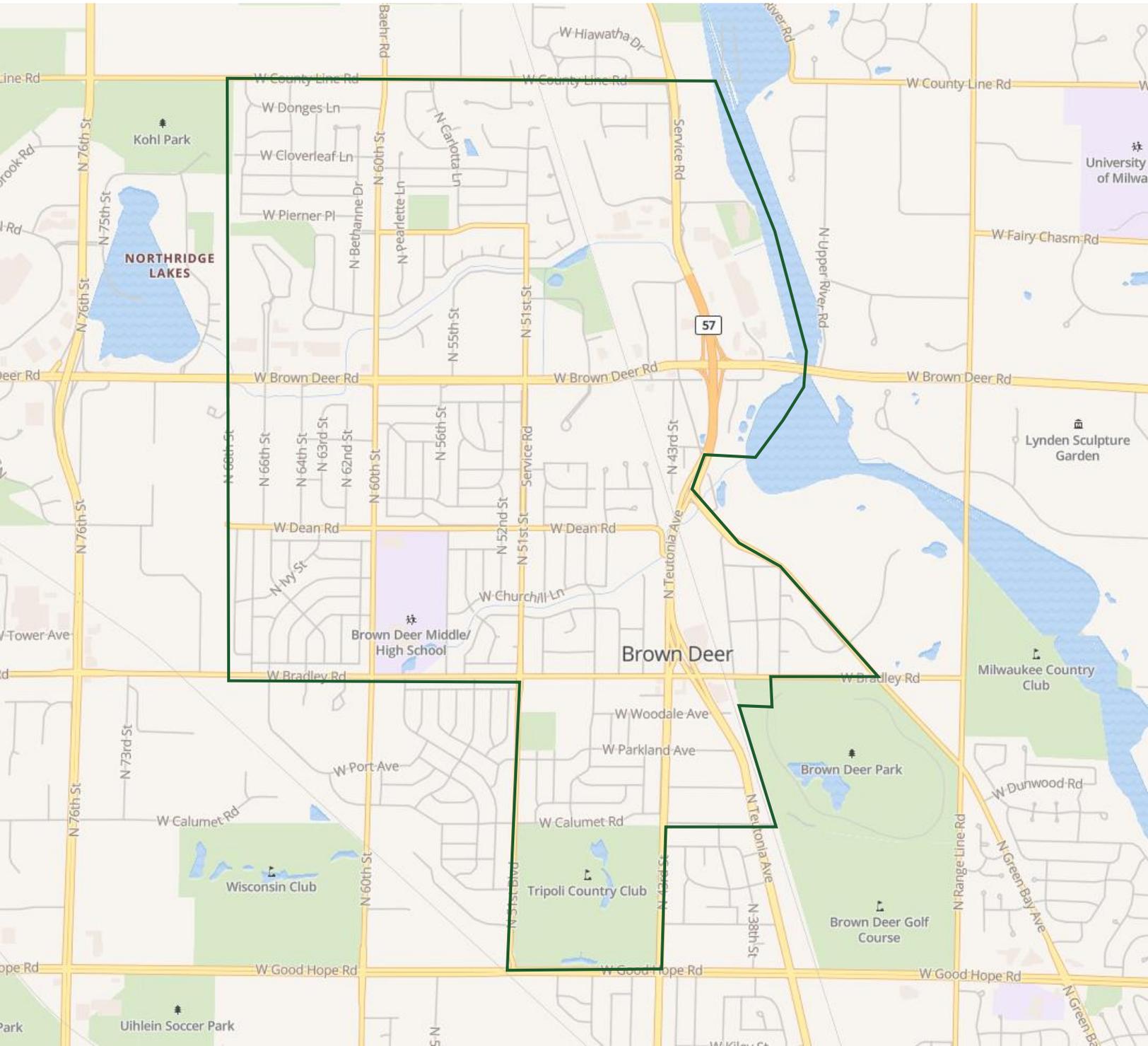


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# VILLAGE OF BROWN DEER



# Introduction

## Purpose

In January of 2016, the Village of Brown Deer (Village), Wisconsin retained Colliers International | Wisconsin to conduct a retail market analysis that examines the retail development potential for the Village. The purpose of the retail assessment is to provide an analytical explanation of the local retail market and identify a proposed mix of retail businesses likely to succeed given the local economic, demographic and retail environment. The Village is seeking to support local tenant recruitment to fill existing vacancies and redevelopment sites. This report presents the preliminary findings of the data analysis leading up to the subsequent retail mix marketing and strategy recommendations.

The assignment consisted of completing the following five elements:

1. Assembling retail attraction data for the Village of Brown Deer with particular attention to demographic characteristics important to targeted recruitment efforts.
2. Compiling and understanding the existing retail offering and environment in the Village of Brown Deer.
3. Surveying the Village of Brown Deer and surrounding area residents and stakeholders to determine their current shopping and dining behaviors and potential to increase local spending based on adding desired business categories.
4. Identifying the current sales potential within markets available to the Village of Brown Deer’s existing businesses to establish market opportunities for future business recruitment
5. Developing an information framework with useful tools to assist the Village in conducting and sustaining ongoing retail recruitment.

Colliers International reviewed relevant data from the Esri database including the Village of Brown Deer and proximate area. This data includes population, income, education and spending potential for the following markets:

- The Village of Brown Deer
- A Primary Trade Area for retail goods and services extending beyond the Village.
- A Secondary Trade Area for retail goods and services extending beyond the Primary Trade Area.

## Report Organization

This preliminary findings report is organized into nine sections and an Appendix. These sections include:

Section 1	Introduction
Section 2	Demographic & Economic Profile
Section 3	Tapestry Segmentation
Section 4	Retail Mix
Section 5	Retail Shopper Survey
Section 6	Potential Target Retail Sectors
Section 7	Proposed Retail Business Mix

2) Demographic and Economic Profile

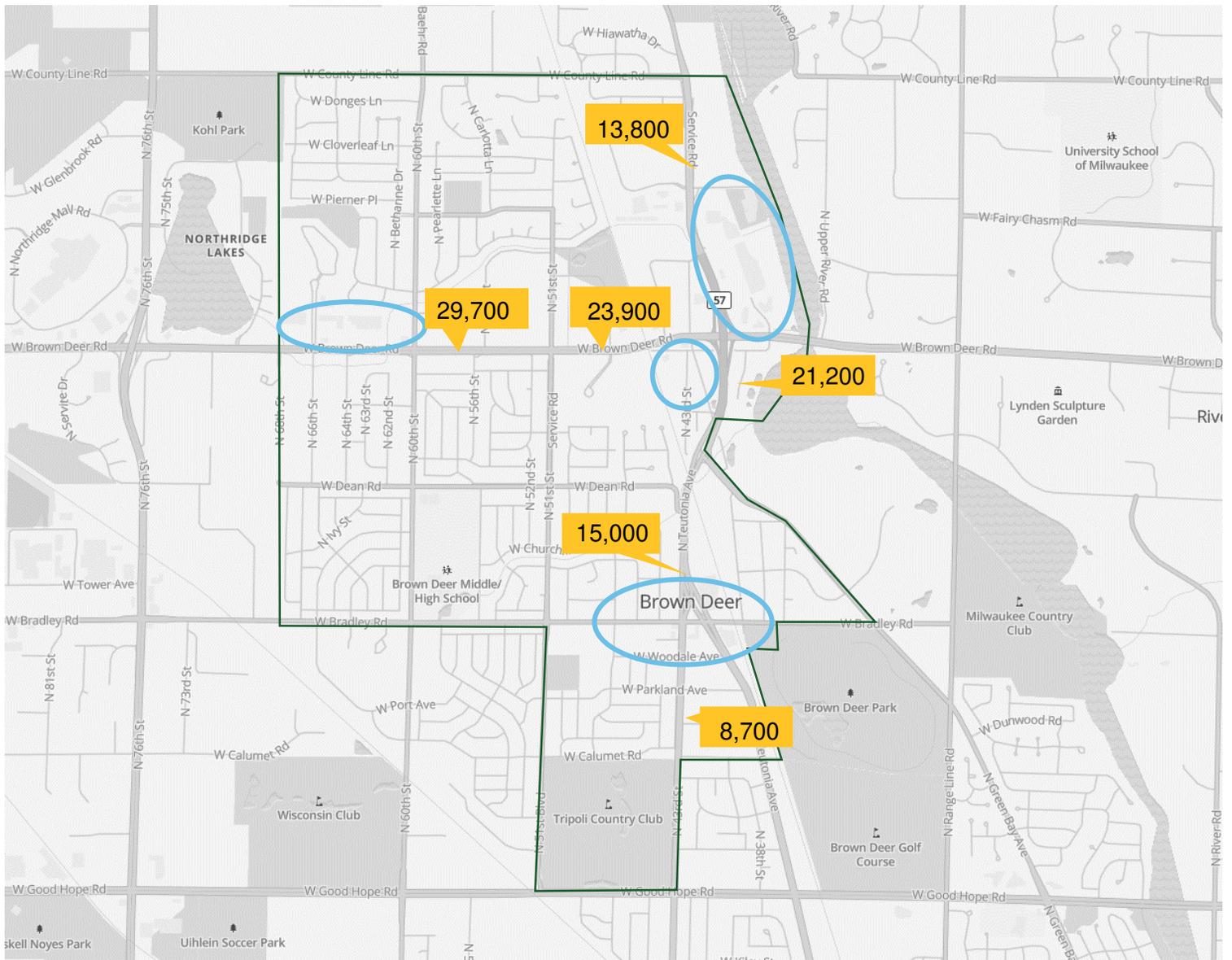
# Demographic and Economic Profile

Colliers conducted a demographic and economic profile of the Village in order to understand the opportunities present and begin to craft competitive advantages that will be useful in the outreach process. The first step in performing the analysis is identifying the analysis area.

The Village is well developed with no large tracts of readily developable space, thus the existing retail centers are sufficient anchor points for determining the analysis area. The majority of existing retail in Brown Deer is located in or near the highlighted areas below with traffic counts provided for the major intersections within the Village<sup>†</sup>. Section 4 of this study provides an overview of the existing retail presence in the Village.

Source: Wisconsin Department of Transportation Average Daily Traffic Count

## Existing Retail Concentration



2) Demographic and Economic Profile

**Analysis Area**

Using drive times from the existing retail centers, the following trade areas were identified. Using the areas of existing retail concentration as anchors, Colliers identified the following primary and secondary retail trade areas for the Village of Brown Deer, which are outlined below. Considering the Village of Brown Deer’s location, we believe that most the retail demand is captured within the Primary Trade Area.

Primary

Within 5 minutes of one or more of the retail centers in the village.  
 Estimated Capture: 75 percent of Village of Brown Deer’s retail demand

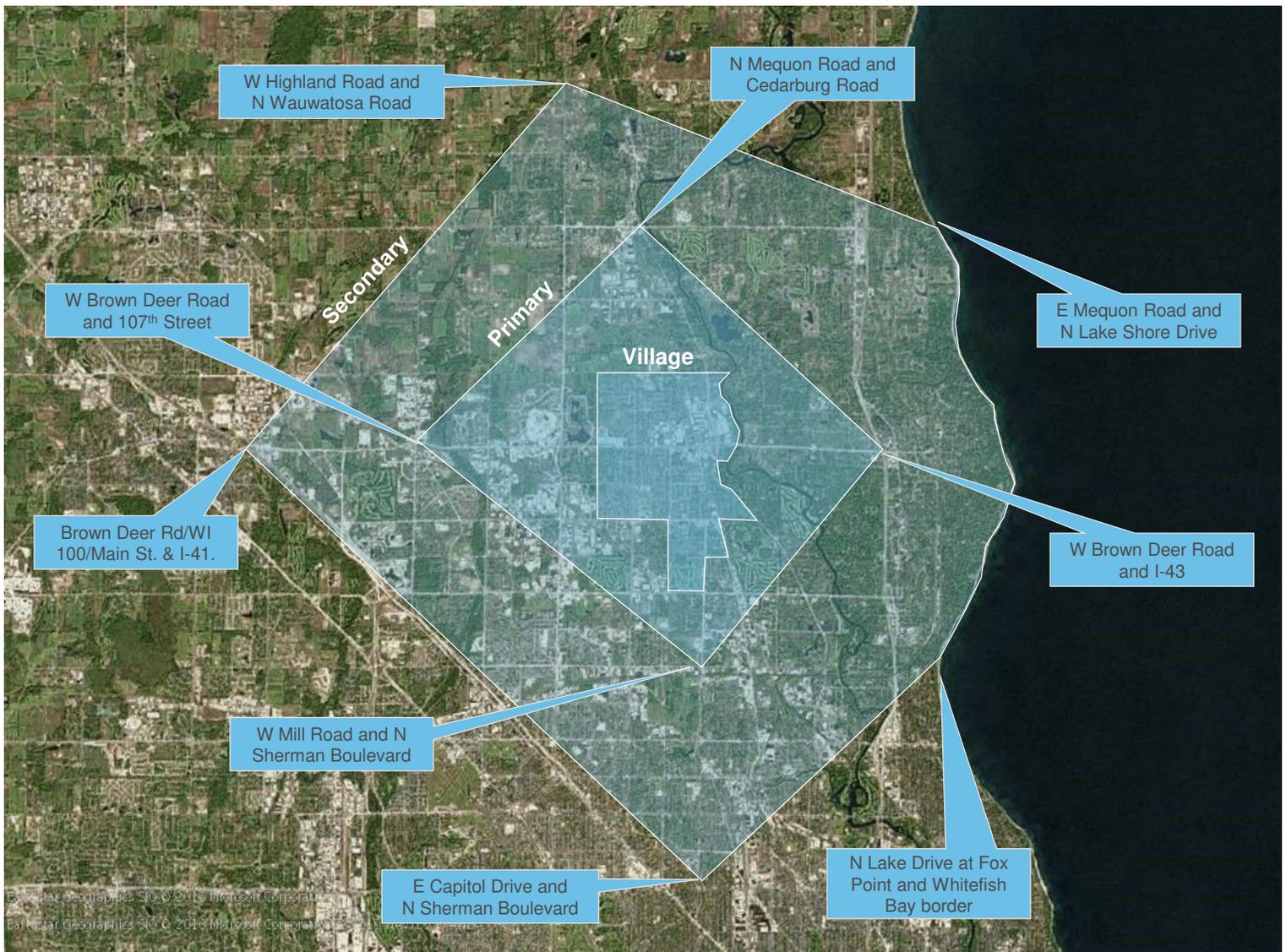
Secondary

Within 10 minutes of one or more of the retail centers in the village.  
 Estimated Capture: 15 percent of Village of Brown Deer’s retail demand

Other

Area outside of the primary and Secondary Trade Areas.  
 Estimated Capture: 10 percent of Village of Brown Deer’s retail demand

**Trade Area Overview**



2) Demographic and Economic Profile

### Demographic and Economic Profile

To evaluate the depth and characteristics of potential demand presented by households and firms for retail uses, an assessment of the demographic and economic conditions of the Village of Brown Deer Trade Area (including Primary and Secondary Trade Areas) and surrounding areas was performed.

	Village	Primary	Secondary	Milwaukee Co.	Milwaukee MSA
Population	12,252	36,454	147,321	939,707	2,310,091
Households	5,414	15,298	57,980	382,260	919,912
Average Household Size	2.25	2.35	2.51	2.4	2.45
Median Household Income	\$56,392	\$41,974	\$44,863	\$41,153	\$53,283
Per Capita Income	\$30,454	\$26,359	\$28,073	\$23,506	\$28,686
Median Age	42.9	37.4	36.7	34.6	38.3
Median Home Value	\$166,819	\$150,600	\$165,809	\$165,077	\$184,080
Employee to Resident Ratio	0.74	0.79	0.63	0.57	0.59
Employees	9,047	28,771	92,086	532,830	921,793
Civilian Unemployed	4.10%	6.90%	8.10%	7.60%	6.10%

### Household Income

The median household income for the Village of Brown Deer (\$56,392) is 37.03 percent higher than that of Milwaukee County. Additionally, both the Primary and Secondary Trade Areas have median household incomes that are 1.99 and 9.02 percent higher than the median household income of the county. The highest single subset of the Primary Trade Area earns between \$50,000 and \$74,999, with 11 percent earning between \$75,000 and \$99,999, and an estimated 16.2 percent earning over \$100,000.

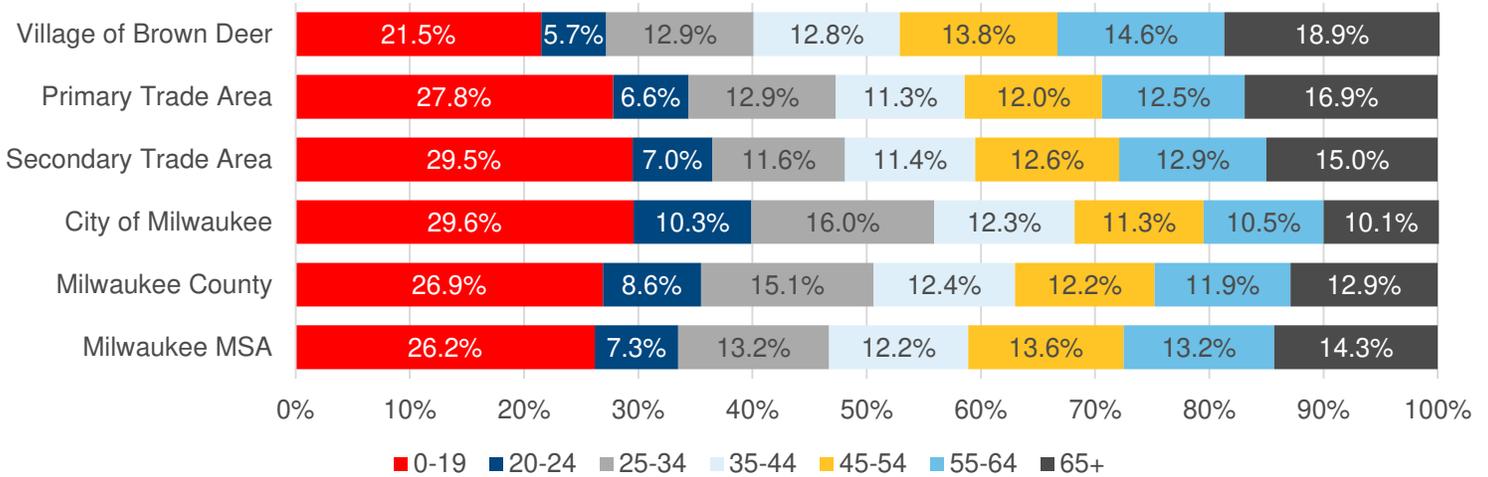
	Village	Primary	Secondary	Milwaukee Co.	Milwaukee MSA
less than \$15,000	9.2%	18.0%	16.4%	17.5%	12.8%
\$15,000-\$24,999	9.4%	12.0%	11.5%	12.5%	10.2%
\$25,000-\$34,999	10.6%	11.8%	11.6%	12.8%	10.8%
\$35,000-\$49,999	14.2%	15.1%	14.6%	14.8%	13.3%
\$50,000-\$74,999	19.5%	16.0%	15.9%	17.3%	17.4%
\$75,000-\$99,999	15.5%	11.0%	10.1%	10.7%	12.5%
\$100,000-\$149,999	15.0%	10.1%	10.5%	9.6%	13.4%
\$150,000-\$199,999	5.0%	2.7%	3.9%	2.8%	5.2%
\$200,000 or greater	1.7%	3.4%	5.6%	2.1%	4.4%

Source: Esri 2015

2) Demographic and Economic Profile

**Age**

The Primary and Secondary Trade Area residents are substantially younger when compared to the actual Village of Brown Deer. The Trade Area is in line with Milwaukee MSA and slightly older than Milwaukee County’s population. Approximately 21.5 percent of the Village’s residents are school age (less than 20 years old) compared to 29.5 percent for the Secondary Trade Area. Notably, residents aged 65 years and older represent 18.9 percent of the residents in the Village of Brown Deer compared to 12.9 percent in the County as a whole.



**Own vs Rent Housing**

Within the Village of Brown Deer Trade Area, homeownership rates are 8.1 percent higher than ownership rates for Milwaukee County. Over 30 percent of homeowners do not have a mortgage on their home, a rate that is consistent across the metropolitan area. Focusing only on the Primary Trade Area decreases the percent who own, but ownership rates do not fall below Milwaukee County levels. Vacancy rates for the Village are 4.6% with median rental rates being 23.23 percent higher than the county median contract rent.

	Village	Primary	Secondary	Milwaukee Co.	Milwaukee MSA
Total Housing Units	5,677	16,787	63,336	423,316	680,630
Owner Occupied Housing Units	67.6%	50.9%	57.5%	49.4%	59.7%
Renter Occupied Housing Units	27.8%	40.3%	34.1%	40.9%	32.4%
Vacant Housing Units	4.6%	8.9%	8.5%	9.7%	8.0%
Owner Households with Mortgage <sup>1</sup>	70.4%	68.9%	70.3%	70.0%	70.3%
Median Contract Rent <sup>1</sup>	\$817	\$689	\$679	\$663	\$682

Source: 2015 Esri data unless otherwise noted.

<sup>1</sup>2009 to 2013 ACS data

2) Demographic and Economic Profile

### Household Type

Compared to Milwaukee County, the Village has a higher percentage of husband-wife family households. Expanding to the Primary and Secondary Trade Areas, the household mix changes to include more “other” family households. Once expanded, the mix of different types of households for the Trade Area are similar to that of Milwaukee County. The percentage of nonfamily households, individuals living alone or with others not related by birth or marriage, is lower than Milwaukee County for all subject Trade Areas.

	Village	Primary	Secondary	Milwaukee Co.	Milwaukee MSA
Husband-wife Family Households	45.48%	34.84%	38.90%	35.13%	44.92%
Other Family Households	15.17%	25.63%	27.09%	22.49%	17.95%
Total Nonfamily Households	39.36%	39.53%	34.01%	42.38%	37.13%

Source: Census 2010

### Race and Ethnicity

The racial and ethnic makeup of the Trade Area is similar to the race/ethnic breakdown of Milwaukee County. 89.6 percent of the population within the Village of Brown Deer Trade Area is Black / African American (46.0%) or White alone (40.6%). Most surrounding geographies contain similar diverse populations with the exception of Milwaukee MSA, a population that is 69.4 percent White.

	Village	Primary	Secondary	Milwaukee Co.	Milwaukee MSA
White	58.2%	40.6%	41.8%	54.7%	69.4%
Black/African American	30.9%	49.0%	47.9%	27.5%	16.9%
Hispanic Population	4.6%	5.8%	4.2%	13.1%	9.7%
American Indian/Alaska Native	0.4%	0.4%	0.3%	0.6%	0.5%
Asian	5.7%	4.1%	5.5%	4.0%	3.4%
Pacific Islander	0.0%	0.0%	0.0%	0.0%	0.0%
Other Race	0.2%	0.2%	0.1%	0.1%	0.1%
2015 Diversity Index (Esri)	60	64	63	68	55

Source: 2015 Esri data. Colliers normalized.

### Education

Of the population within the Primary Trade Area, 32.09 percent of residents have obtained a Bachelor’s Degree. Consistent across the Metropolitan Area, 23.95 percent have had some college, with an additional 23.6 percent having a high school diploma. This results in less than 10 percent of the population within the Primary Trade Area not having graduated high school. The level of educational attainment within the Primary and Secondary Trade Areas are consistent with those of the Milwaukee Metropolitan Statistical Area.

	Village	Primary	Secondary	Milwaukee Co.	Milwaukee MSA
Less than 9th Grade	1.16%	3.13%	3.06%	4.46%	3.19%
9-12th Grade/No Diploma	4.83%	6.53%	7.58%	8.64%	6.38%
High School Diploma	20.5%	23.6%	21.5%	24.33%	23.55%
GED/Alternative Credential	2.99%	3.14%	3.43%	3.87%	3.23%
Some College/No Degree	23.88%	23.95%	22.91%	21.28%	21.19%
Associate’s Degree	8.51%	7.55%	7.02%	7.63%	8.52%
Bachelor’s Degree	24.25%	19.93%	21.01%	19.31%	22.4%
Graduate/Professional Degree	13.89%	12.16%	13.5%	10.49%	11.54%

2015 Population Age 25+

Source: Esri 2015.

2) Demographic and Economic Profile

**Labor Force**

For the Primary Trade Area, the rate of unemployment is 6.9 percent, which while lower than Milwaukee County, is significantly higher than the national unemployment rate (5.0 percent, Dec. 2015)<sup>†</sup>. With only 50 percent of the population within the Primary Trade Area being apart of the labor force, the 6.9 percent unemployment rate becomes more significant. Expanding to the Secondary Trade Area depicts a similar story of high unemployment rates, and less than 50 percent of the population being in the labor force. The types of jobs that residents within the Primary Trade Area have are similar to residents of Milwaukee County and the Metropolitan area. The one notable difference being the 2.8 percent increase in Finance / Insurance employees living within the Primary Trade Area.

<sup>†</sup> Source: Bureau of Labor Statistics

	Village	Primary	Secondary	Milwaukee Co.	Milwaukee MSA
Civilian Population Age 16+ in Labor Force	7,097	17,993	71,568	492,469	838,043
Employed Civilian Population Age 16+	95.9%	93.1%	91.9%	92.4%	93.9%
Agriculture/Forestry/Fishing/Hunting	0.3%	1.4%	0.6%	0.5%	0.6%
Mining/Quarrying/Oil & Gas Extraction	0.0%	0.0%	0.0%	0.1%	0.1%
Construction	3.5%	2.4%	2.3%	3.6%	4.4%
Manufacturing	17.0%	16.2%	15.1%	15.2%	17.0%
Wholesale Trade	1.4%	1.4%	2.1%	2.3%	2.8%
Retail Trade	10.8%	9.9%	10.6%	10.8%	11.2%
Transportation/Warehousing	3.2%	3.3%	3.8%	4.1%	3.6%
Utilities	1.1%	0.5%	0.4%	0.6%	0.6%
Information	2.8%	2.1%	2.1%	1.9%	1.8%
Finance/Insurance	8.1%	8.8%	7.8%	6.0%	6.3%
Real Estate/Rental/Leasing	1.1%	1.0%	1.6%	1.4%	1.4%
Professional/Scientific/Tech Services	6.1%	5.2%	6.0%	5.3%	6.0%
Management of Companies/Enterprises	0.2%	0.1%	0.1%	0.2%	0.2%
Admin/Support/Waste Memt Services	4.7%	5.0%	4.6%	4.9%	4.2%
Educational Services	5.9%	7.4%	8.5%	8.9%	8.4%
Health Care/Social Assistance	16.2%	17.9%	19.3%	16.8%	15.7%
Arts/Entertainment/Recreation	1.6%	2.1%	2.1%	2.1%	1.9%
Accommodation/Food Services	4.3%	5.5%	4.5%	7.1%	6.2%
Other Services (excl Public Administration)	8.0%	6.5%	5.4%	4.7%	4.6%
Public Administration	3.8%	3.3%	3.1%	3.6%	3.0%
Unemployed Population Age 16+	4.1%	6.9%	8.1%	7.6%	6.1%
Unemployment Rate	4.1%	6.9%	8.1%	7.6%	6.1%

Source: Esri 2015

2) Demographic and Economic Profile

**Employees**

For the Primary Trade Area, the amount of employees working within the manufacturing sector is substantial. Within Milwaukee County only 10 percent of all employees work in manufacturing, whereas within the Primary Trade Area 31.41 percent work in the industry, a 21.40 percent difference. Furthermore, there is an additional 9.22 percent of employees working within Wholesale Trade in the Primary Trade Area. Compared to the county there is a significant decrease in percentage of employees working in Service and Health Services jobs. Overall, the area employs industrial workers at a higher percentage than both the county and Milwaukee MSA.

	<b>Village</b>	<b>Primary</b>	<b>Secondary</b>	<b>Milwaukee Co.</b>	<b>Milwaukee MSA</b>
Total Employees	9,371	29,291	101,019	579,214	982,466
Agriculture	76	232	893	3,126	8,857
Construction	187	773	3,805	20,978	41,739
Manufacturing	904	9,201	24,046	57,988	135,144
Transportation	107	356	4,373	23,152	34,205
Communication	270	296	651	5,288	6,875
Utility	6	36	165	3,393	4,564
Wholesale Trade	1,912	3,905	8,539	23,825	47,141
Retail Trade	1,713	4,777	21,836	108,668	191,683
Home Improvement	18	413	838	5,814	12,023
General Merchandise	406	778	9,957	19,587	34,046
Food Stores	124	195	1,525	11,437	21,557
Auto Dealer / Gas Station	68	589	1,991	10,469	17,698
Apparel / Accessory	81	308	567	4,525	6,575
Furniture / Home Furnishings	141	470	1,182	5,678	11,727
eating & Drinking	492	1,244	3,812	36,743	61,711
Misc Retail	383	779	1,964	14,415	26,346
Finance/Insur/Real Estate	760	1,235	3,933	41,687	68,046
Banks	263	417	781	9,677	16,209
Securities Brokers	125	139	969	6,595	10,245
Insurance	22	47	585	11,675	20,711
Real Estate / Holdings	350	633	1,598	13,740	20,881
Service	3,219	8,055	30,089	261,878	397,003
Hotel / Lodging	213	245	485	5,008	8,172
Auto Services	72	503	1,170	5,891	9,745
Movie Amusement	377	665	1,419	11,884	19,883
Health Services	600	1,642	7,121	95,378	123,460
Legal Services	22	26	392	10,347	12,519
Education / Library	387	897	5,664	42,922	66,890
Other Service	1,548	4,076	13,837	90,448	156,334
Government	217	284	2,382	28,388	45,594
Unclassified Establishments	0	141	308	843	1,615

Source: Esri 2016

2) Demographic and Economic Profile

### Consumer Spending

Household consumer spending data shows the amount spent on a variety of goods and services by households. On average, households within the Village of Brown Deer spend approximately \$23,109 on retail goods. This is considerably more than the Primary Trade Area and Milwaukee County as a whole but slightly less than the Secondary Trade Area and Milwaukee MSA. In sum, this suggests the Village is in a middle ground position between the lower income areas in the City of Milwaukee and the affluent areas of River Hills, Mequon, Fox Point, Bayside, Whitefish Bay and Glendale.

	Village	Primary	Secondary	Milwaukee Co.	Milwaukee MSA
Apparel & Services	\$2,078.93	\$1,945.02	\$2,215.21	\$1,817.72	\$2,282.37
Education	\$1,452.83	\$1,313.66	\$1,504.41	\$1,228.83	\$1,567.89
Entertainment/Recreation	\$3,040.77	\$2,694.63	\$3,105.63	\$2,487.51	\$3,203.59
Food at Home	\$4,704.36	\$4,391.48	\$4,983.56	\$4,074.22	\$5,097.08
Food Away from Home	\$2,974.31	\$2,725.98	\$3,099.51	\$2,547.69	\$3,224.58
Health Care	\$4,437.64	\$3,864.97	\$4,471.35	\$3,515.03	\$4,559.81
Housing	\$20,023.09	\$18,505.97	\$20,970.17	\$17,044.71	\$21,434.44
Household Operations	\$1,736.32	\$1,515.94	\$1,742.74	\$1,390.95	\$1,803.15
Housekeeping Supplies	\$649.92	\$593.52	\$676.80	\$546.56	\$694.73
Investments	\$2,153.78	\$1,855.90	\$2,120.06	\$1,702.24	\$2,289.79
Personal Care Products & Services	\$710.55	\$646.86	\$739.53	\$598.28	\$766.36
Travel	\$1,834.53	\$1,563.77	\$1,815.49	\$1,437.65	\$1,902.63
Transportation	\$9,579.67	\$8,660.57	\$9,944.64	\$8,056.47	\$10,217.77
<b>Annual Budget Expenditures</b>	<b>\$66,132.95</b>	<b>\$59,788.68</b>	<b>\$68,421.55</b>	<b>\$55,241.71</b>	<b>\$70,378.92</b>

Source: Esri 2015

## 2) Demographic and Economic Profile

### Key Observations

Key observations and findings from the economic and demographic profile will focus on the Primary Trade Area, as this is the market group that contributes to the majority of retail spending within the Village of Brown Deer. The key observations and findings include:

#### General

- An estimated 3.88 percent of Milwaukee County's population and 1.58 percent of Milwaukee MSA is included in the Primary Trade Area.
- The average age within the Village of Brown Deer is high (42.9), but when looking at the Primary Trade Area average age drops to 37.4 years old.
- The race/ethnic makeup of the trade area is consistent with the surrounding areas, with the exception of Milwaukee County.

#### Above Average

- The percent of owner occupied units in the Primary Trade Area is higher than Milwaukee County, with favorable vacancy and rental rates in both the Village and its Trade Areas.
- Due to employment opportunities within the Primary Trade Area, an area whose resident population is only 3.88 percent of Milwaukee County's population, swells to a daytime workforce population of 5.06 percent, or 29,291 people.

#### Average

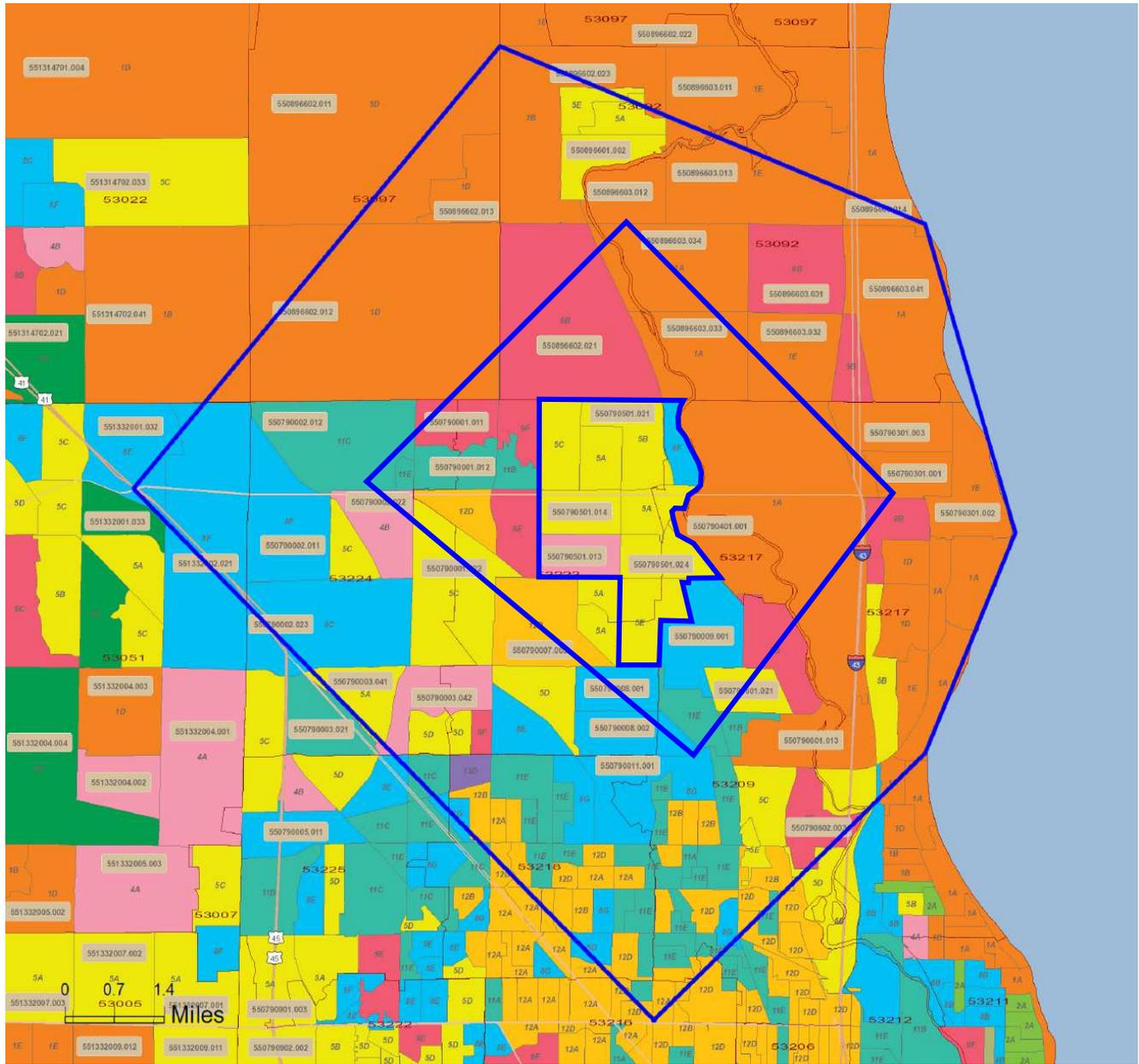
- The median household income is 1.99 percent higher than Milwaukee county; and, when narrowing the focus to the Village of Brown Deer, the median household income is 37.03 percent higher than the county's median.
- Annual consumer expenditure, within the Primary Trade Area is consistent with other areas of the Milwaukee market including Milwaukee County.
- Unemployment rates for the Primary Trade Area are consistent with employment numbers within Milwaukee County, however unemployment rates are higher than the national average.

3) Tapestry Segmentation

# Tapestry Segmentation

Tapestry segmentation identifies prevailing characteristics about the residents of a community. An analysis of the Village, Primary and Secondary Trade Areas show a broad range of characteristics.

## Primary Tapestry LifeMode by Block Group



Tapestry LifeMode

- Affluent Estates
- Middle Ground
- Upscale Avenues
- Senior Styles
- Uptown Individuals
- Rustic Outposts
- Family Landscapes
- Midtown Singles
- GenXurban
- Hometown
- Cozy Country
- Next Wave
- Ethnic Enclaves
- Scholars and Patriots

The Tapestry map above depicts the dominant LifeMode in each of the area's outlined. Additionally, each block group has a two or three digit label that corresponds to a Tapestry Segmentation.

Source: Esri

### 3) Tapestry Analysis

## Tapestry Analysis

### LifeMode 5: GenXUrban

The Village of Brown Deer largely falls into GenXUrban, the second largest tapestry group. This group is comprised of married couples with fewer kids and a growing number of retirees. About a fifth of the residents are 65 or older, with a fourth of the households having retirement income. Households within this group tend to own older single family homes located in urban areas and generally have a mortgage. Owning 1 or 2 cars is common, and the group tends to live and work within the same county, cutting down on commute times. They invest wisely, are well insured, and are comfortable with online banking. Additionally, they are news junkies, enjoy reading, playing board games and cards, doing crossword puzzles, going to museums, dining out, and walking for exercise.

### LifeMode 4: Family Landscapes

One block within the Village falls into the category of Family Landscapes. Comprised of young families owning their first home, generally newer single family homes, this group is mostly homeowners (80%) with mortgages (second highest percentage of any group). The group has the second highest labor force participation rate, as well as low unemployment rates. These non-diverse, two worker married-couple families are do-it-yourselfers who work on their home improvement projects, as well as lawns and gardens. The group is sports enthusiasts, who typically own newer sedans or SUV's, dogs, and have savings accounts. They are also comfortable with the newest technologies. To accommodate their busy lifestyles, the group eats out a lot at fast food or family restaurants. Leisure activities include bowling, swimming, playing golf, video games, watching movies rented via Redbox, and going to the zoo or theme parks.

### LifeMode 8: Middle Ground

The last Village block falls into the Middle Ground group. Made-up of thirtysomethings who attended or graduated college, this group is millennials in the middle: single/married, renters/homeowners, and middle class/working class. They live in a mix of single family homes, townhomes, and multi-unit buildings. The group no longer has landlines as they are reliant upon their cellphones for music, reading the news, and receiving updates on their favorite sports teams. Comprised of high internet users, the group uses the internet for entertainment, social media, shopping and the news. They also enjoy night life, going to the beach, traveling, and hiking.

### Primary Trade Area

Expanding focus to include the Primary Trade Area, additional LifeModes are important. While GenXUrban appears to remain the dominant group, other groups such as Affluent Estates and Senior Styles are also sizeable. Midtown Singles and Hometown are also apart of the Primary Trade Area, with their impact being rather small.

Segmentation overviews can also be downloaded for free at [arcgis.com](http://arcgis.com).

Source: Esri

4) Retail Mix

## Retail Mix

### Overview

Due to the geographic location of the Village of Brown Deer, retail demand is primarily driven from households within a five minute drive to at least one of the retail concentrations that exist within the Village; the location of each concentration is to follow. Below is an overview of the retailers that are active within the Village.

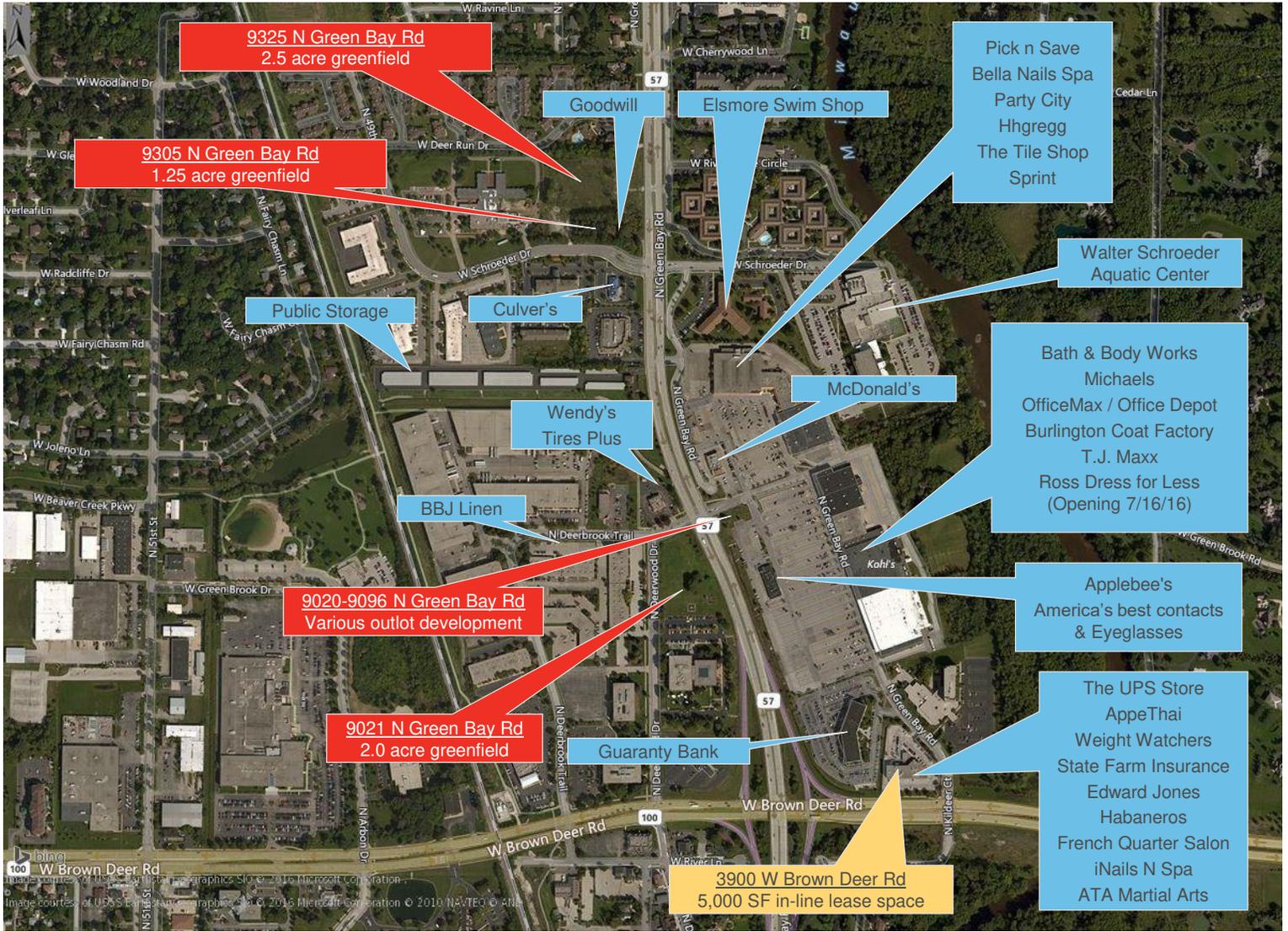
### The Village of Brown Deer

Local	<ul style="list-style-type: none"> <li>Larry's Market</li> <li>Kurt Schulz Deli &amp; Restaurant</li> <li>Pastiche</li> <li>Poco Loco</li> <li>Otto's Wine Cast</li> </ul>
Fast Food	<ul style="list-style-type: none"> <li>Applebee's</li> <li>Culver's</li> <li>McDonald's</li> <li>Papa John's Pizza</li> <li>Subway</li> <li>Wendy's</li> </ul>
Small shop space	<ul style="list-style-type: none"> <li>America's Best Contacts &amp; Eyeglasses</li> <li>Bath &amp; Body Works</li> <li>Bella Nails</li> <li>Bradley Village Barbers</li> <li>Factory Card Outlet</li> <li>Family Dollar</li> <li>I Nails N Spa</li> <li>Snap Fitness</li> <li>Sprint</li> <li>The UPS Store</li> <li>Tuesday Morning</li> <li>Weight Watchers</li> </ul>
Mid-Box	<ul style="list-style-type: none"> <li>Aldi</li> <li>Burlington Coat Factory</li> <li>Goodwill</li> <li>Hhgregg</li> <li>Michaels</li> <li>OfficeMax</li> <li>Party City</li> <li>Pick N Save</li> <li>Ross Dress for Less – opening July 16<sup>th</sup></li> <li>TJ Maxx</li> <li>The Tile Shop</li> <li>Walgreens</li> </ul>
Big Box	<ul style="list-style-type: none"> <li>Walmart</li> </ul>



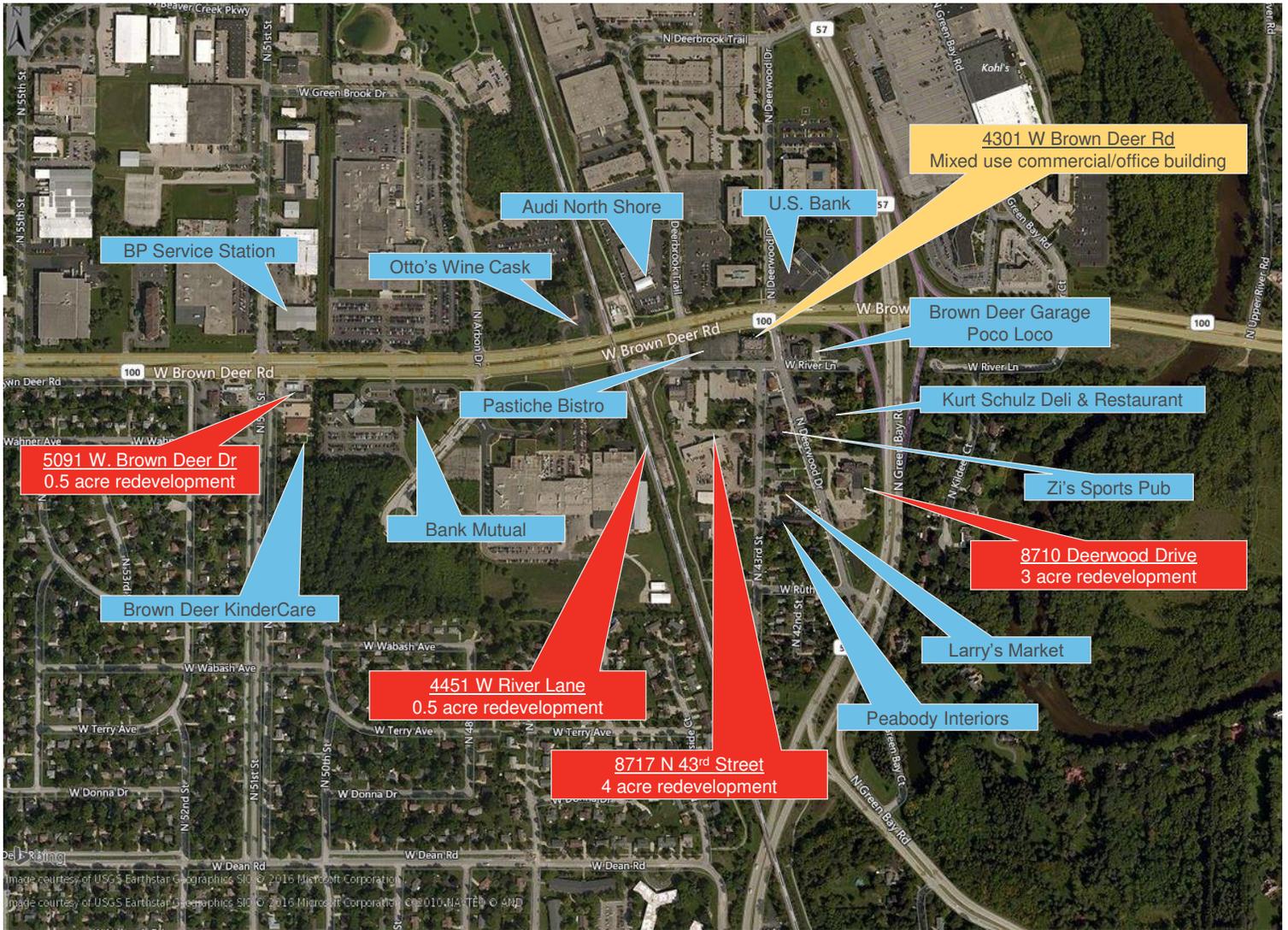
4) Retail Mix

**Aerial Overview – Green Bay Road North of Brown Deer**



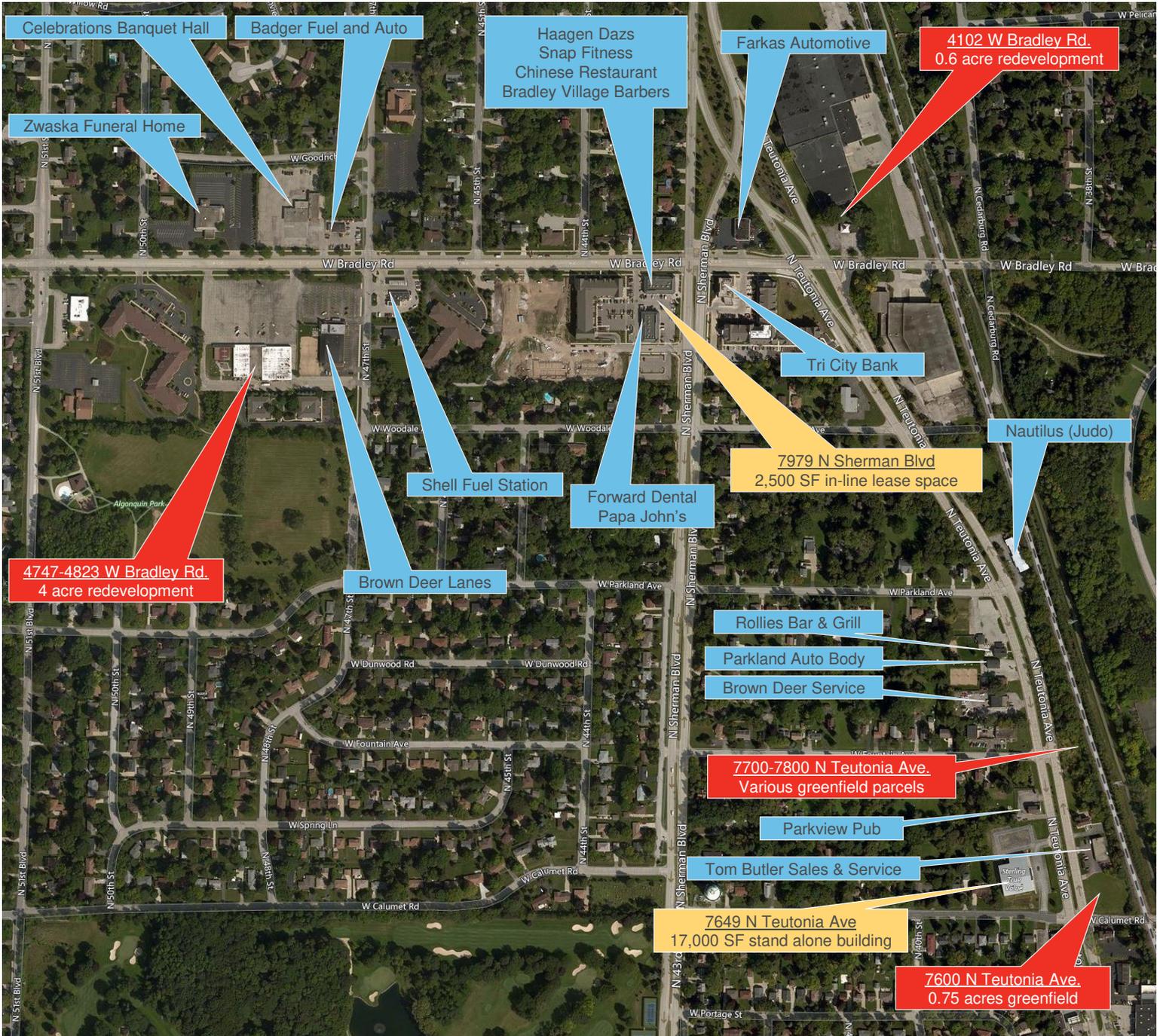
4) Retail Mix

**Aerial Overview – Southwest of Green Bay and Brown Deer**



4) Retail Mix

Aerial Overview – Sherman & Bradley



## Consumer Demand

### Project Overview

Colliers conducted an online shopper preference survey. The survey received over 400 responses with an overwhelming majority (just over 85%) of respondents being residents of Brown Deer. Over 50% of these respondents have lived in Brown Deer for 10 or more years. The residents and shoppers who participated in the survey were asked about their shopping habits and preferences regarding Brown Deer stores and surrounding retail corridors, and how often and where they shop.



## 5) Consumer Demand

**Survey Questions**

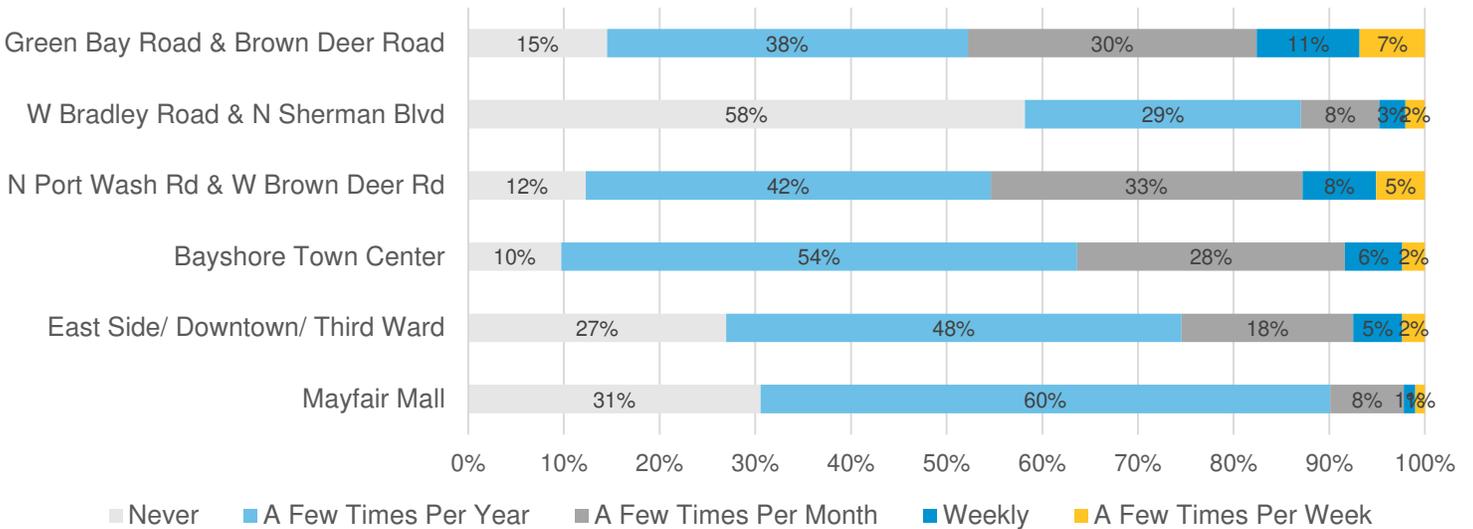
- Question 1** In an average month, how often do you dine in these commercial areas?
- Question 2** In an average month, how often do you purchase goods and/or services in these commercial areas?
- Question 3** When shopping in Brown Deer, how often do you:
- Question 4** How would the addition of these types of stores and services affect the amount of money you that you spend in Brown Deer?
- Question 5** In the last month, what have you purchased that you wish you could have bought in Brown Deer?
- Question 6** Please provide the name and location of the store where you made those purchases.
- Question 7** In an average week, how much would you estimate your household spends on meals away from home (full-service restaurants, take-out, drive-through, etc)?
- Question 8** How would the addition of these restaurants affect the amount you spend in Brown Deer?
- Question 9** In the past month, what non-Brown Deer restaurants did you frequent that you believe would be good additions to Brown Deer?
- Question 10** Rate your overall satisfaction with these factors as they apply to Brown Deer:
- Question 11** When is it the most convenient time for you to shop?
- Question 12** How long have you lived in Brown Deer?
- Question 13** If you are employed, please tell us how frequently you work from home.
- Question 14** Choose the answer that best describes your household:
- Question 15** Please choose the category that best describes how you travel in Brown Deer to shop and dine:
- Question 16** Please choose the category that best matches your age:
- Question 17** Please provide the category of which your employer falls:
- Question 18** If employed, please provide the zip code of your current employer:

5) Consumer Demand

**1. In the average month, how often do you dine in these commercial areas?**

This question details the respondents dining frequency for Brown Deer commercial districts, and alternative commercial districts. The subgroup response analysis compares the percent of respondents who reported visiting each area at least once per month.

	Never	A Few Times Per Year	A Few Times Per Month	Weekly	A Few Times Per Week	Response Count
Green Bay Road & Brown Deer Road	85	<b>221</b>	177	63	40	586
W Bradley Road & N Sherman Blvd	<b>341</b>	169	48	16	12	586
N Port Wash Rd & W Brown Deer Rd	72	<b>248</b>	191	45	30	586
Bayshore Town Center	57	<b>316</b>	164	35	14	586
East Side/ Downtown/ Third Ward	158	<b>279</b>	105	30	14	586
Mayfair Mall	179	<b>349</b>	45	7	6	586



**Observations**

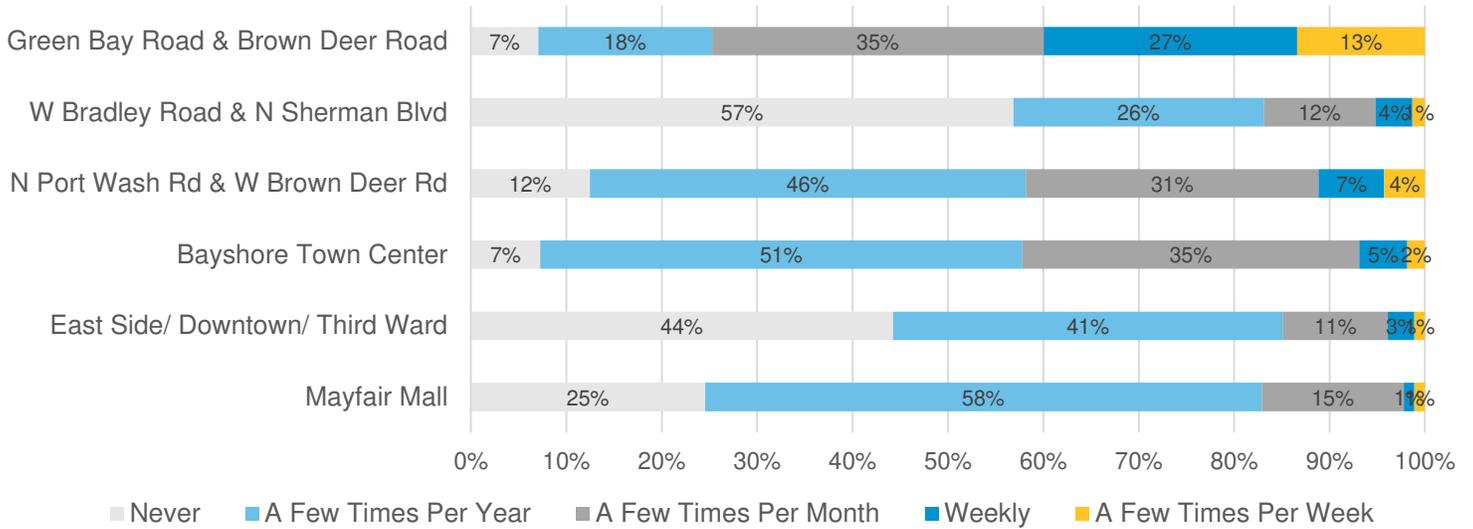
- Almost 50 percent of respondents utilize dining options within the Green Bay Rd and Brown Deer Rd corridor at least a few times a month. Similarly, respondents utilize the dining offerings located at Port Washington Rd & Brown Deer Rd almost as often (located outside of the Village of Brown Deer).
- 90 percent of respondents visit Bayshore Town Center at least a few times a year, suggesting that they are willing to travel slightly further for an increase in dining options.

5) Consumer Demand

**2. In an average month, how often do you purchase goods and/or services in these commercial areas?**

This question details the respondents shopping frequency for Brown Deer commercial districts and alternative commercial districts.

	Never	A Few Times Per Year	A Few Times Per Month	Weekly	A Few Times Per Week	Response Count
Green Bay Road & Brown Deer Road	38	98	<b>187</b>	143	72	538
W Bradley Road & N Sherman Blvd	<b>306</b>	141	63	21	7	538
N Port Wash Rd & W Brown Deer Rd	67	<b>246</b>	165	37	23	538
Bayshore Town Center	39	<b>272</b>	190	27	10	538
East Side/ Downtown/ Third Ward	<b>238</b>	220	59	15	6	538
Mayfair Mall	132	<b>314</b>	80	6	6	538



Observations

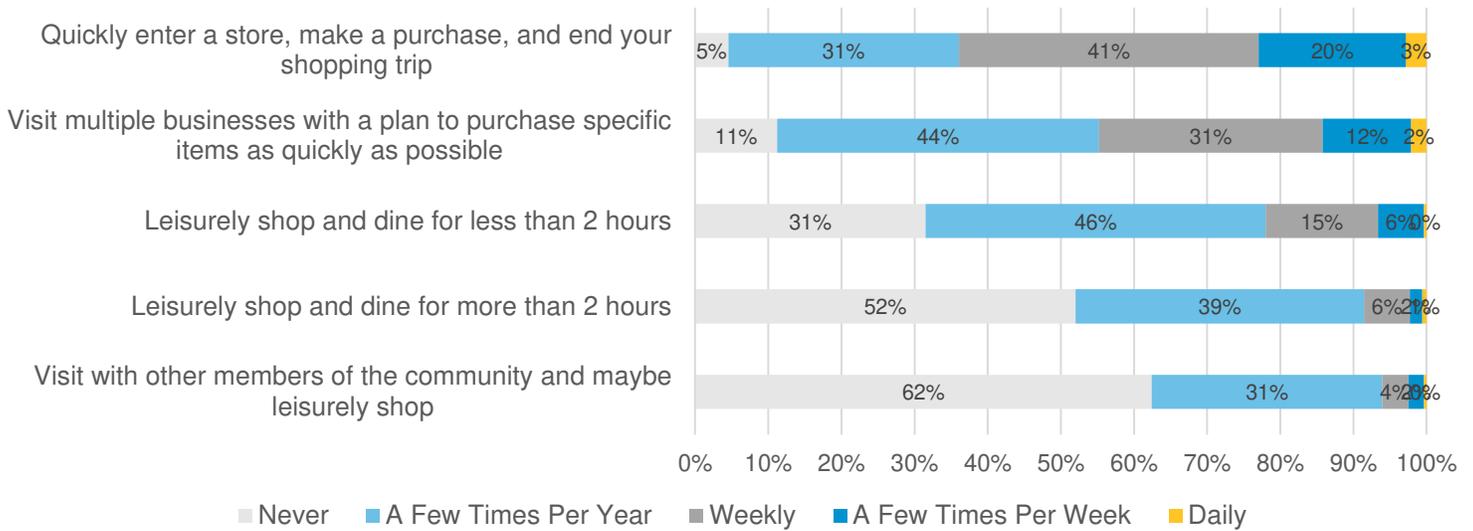
- Location plays a large role in the purchasing activity that occurs in the area.
- Occasionally, respondents are willing to travel farther for businesses not offered in the area. But, when the stores and products that are desired by respondents are located within Brown Deer, the frequency of visits increases.

5) Consumer Demand

**3. When shopping in Brown Deer, how often do you:**

This question seeks to understand how respondent’s currently utilize the businesses in Brown Deer. The results help policy markers determine parking policies and support the need to promote multi-stop visits as a way to improve store and restaurant sales and profitability.

	Never	A Few Times Per Year	Weekly	A Few Times Per Week	Daily	Response Count
Quickly enter a store, make a purchase, and end your shopping trip	24	166	<b>216</b>	106	15	527
Visit multiple businesses with a plan to purchase specific items as quickly as possible	59	<b>232</b>	161	64	11	527
Leisurely shop and dine for less than 2 hours	166	<b>245</b>	81	33	2	527
Leisurely shop and dine for more than 2 hours	<b>274</b>	208	33	9	3	527
Visit with other members of the community and maybe leisurely shop	<b>329</b>	166	19	11	2	527



Observations

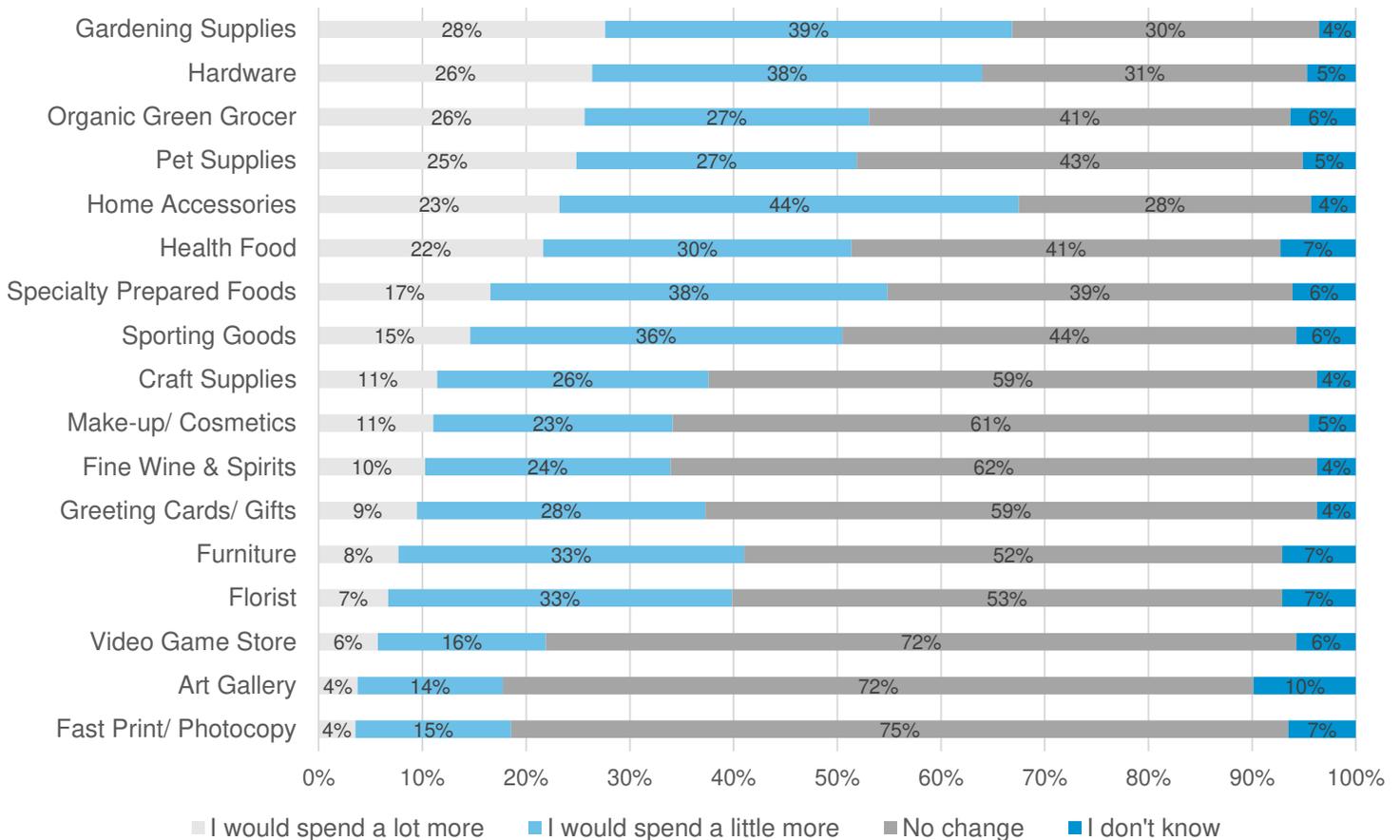
- Convenience is a driving force behind how respondents currently utilize the retail offerings within Brown Deer.
- Most respondents utilize businesses to quickly make purchases, whether that is visiting one or multiple stores with specific items in mind.
- Do respondents utilize businesses this way because it is how they want to shop or because they are limited by the type of retail offerings currently available?

5) Consumer Demand

**4. How would the addition of these types of stores and services affect the amount of money you that you spend in Brown Deer?**

This question provides information on the most desirable items and new tenants. The analysis examines how spending behavior is projected to change if various business categories were added to Brown Deer’s business mix.

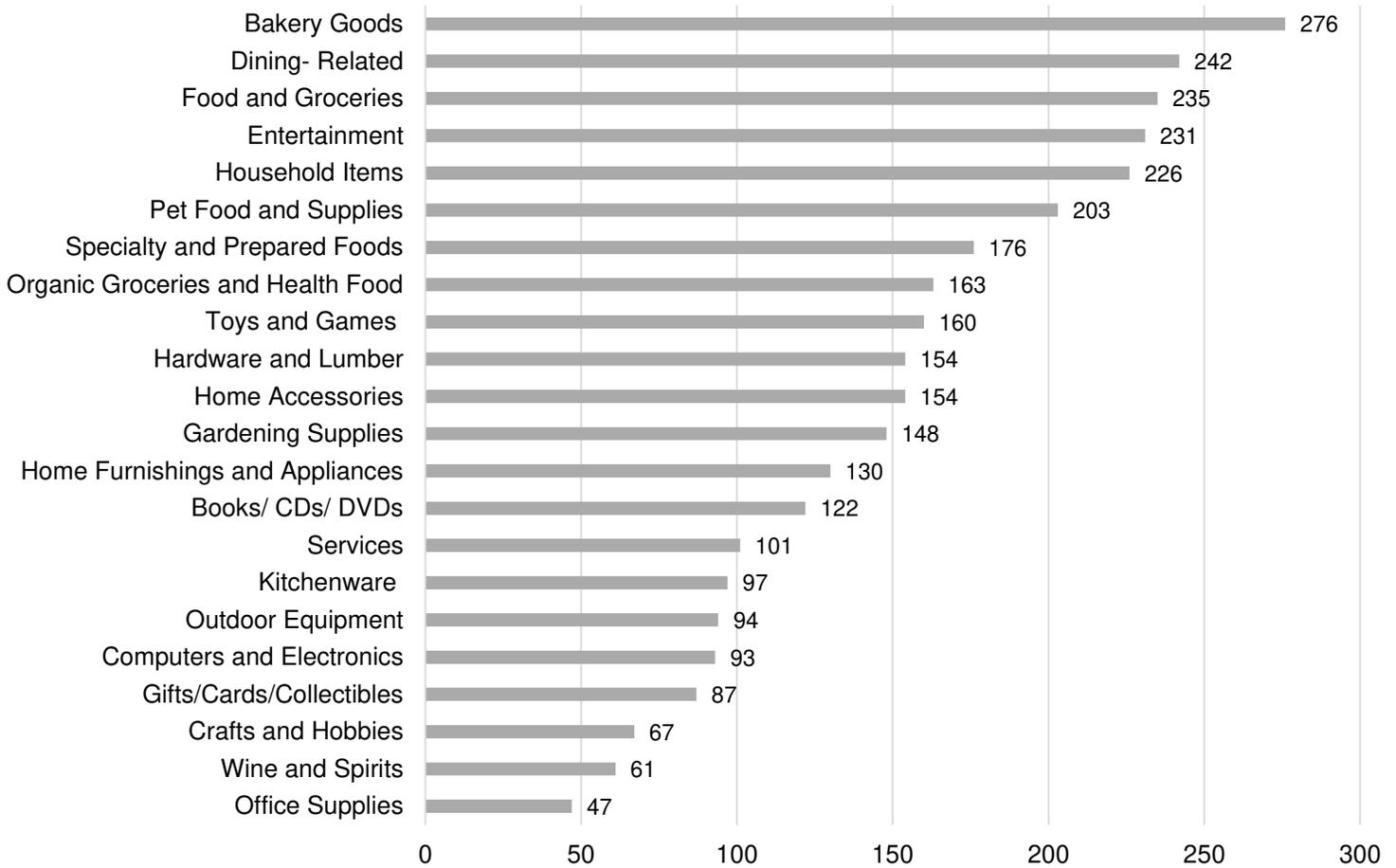
	I would spend a lot more	I would spend a little more	No change	I don't know	Response Count
Gardening Supplies	140	<b>199</b>	150	18	507
Hardware	134	<b>191</b>	159	24	508
Organic Green Grocer	130	139	<b>206</b>	32	507
Pet Supplies	126	137	<b>218</b>	26	507
Home Accessories	118	<b>225</b>	143	22	508
Health Food	110	151	<b>210</b>	37	508
Specialty Prepared Foods	84	194	<b>198</b>	31	507
Sporting Goods	74	182	<b>222</b>	29	507
Craft Supplies	58	133	<b>298</b>	19	508
Make-up/ Cosmetics	56	117	<b>311</b>	23	507
Fine Wine & Spirits	52	120	<b>316</b>	19	507
Greeting Cards/ Gifts	48	141	<b>299</b>	19	507
Furniture	39	169	<b>263</b>	36	507
Florist	34	168	<b>269</b>	36	507
Video Game Store	29	82	<b>367</b>	29	507
Art Gallery	19	71	<b>367</b>	50	507
Fast Print/ Photocopy	18	76	<b>380</b>	33	507



5) Consumer Demand

**5. In the last month, what have you purchased that you wish you could have bought in Brown Deer?**

This question provides information that will be useful in encouraging existing and potential businesses to tailor their offering to the items most desired by survey respondents.



Recurring 'Other' responses:

- Coffee
- Outdoor Goods
- Clothing/Cosmetics

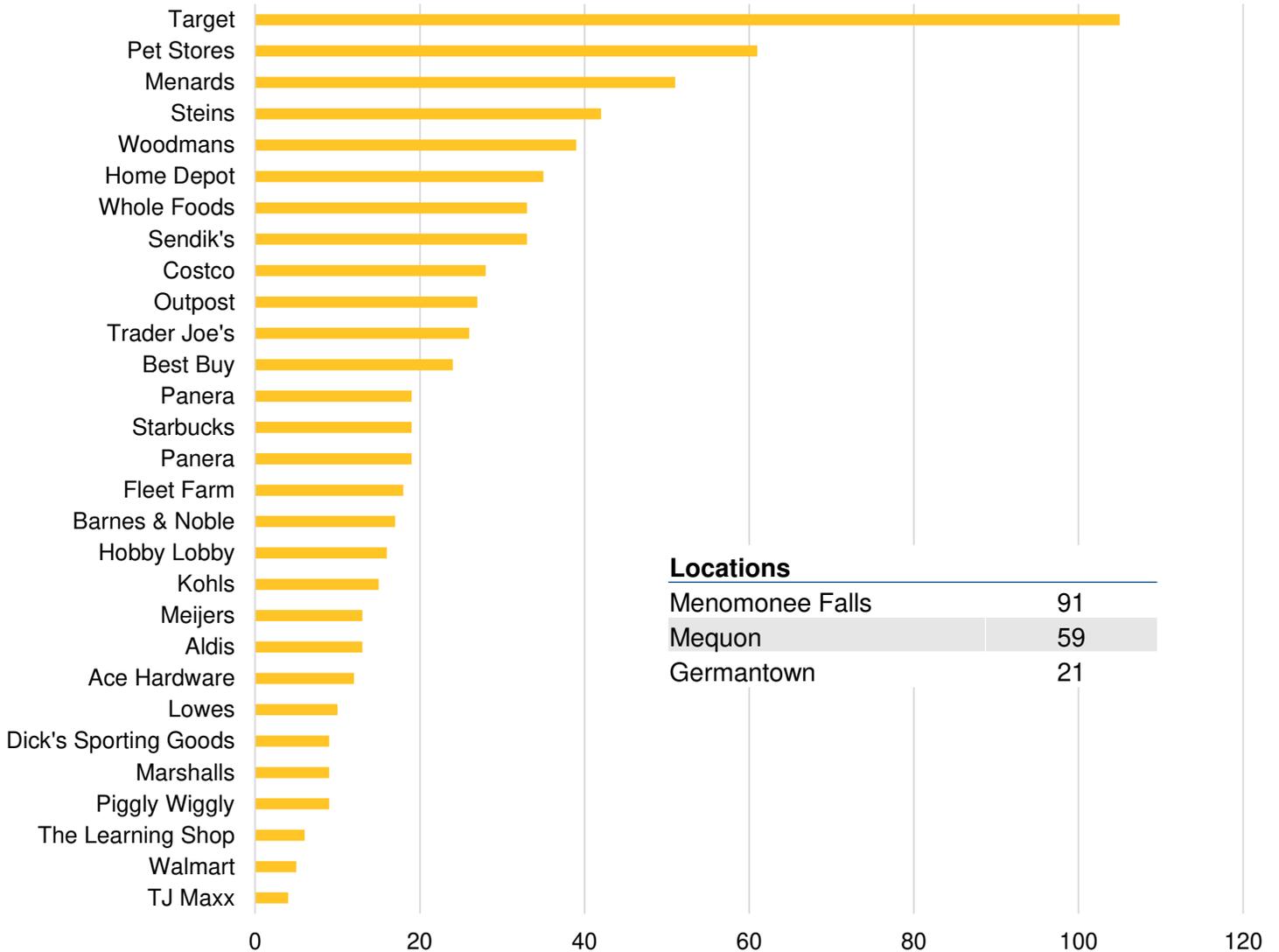
Observations

- The top three answers reveal the desire for more food related businesses within Brown Deer.
- This question provides insight into the tastes of preferences of respondents, as well as provides a foundation for the types of businesses that recruiting efforts ought to be focused on.

5) Consumer Demand

**6. Please provide the name and location of the store where you made those purchases.**

This question provides a list of recruitment targets. The table below indicates those stores with the greatest number of purchases indicated by survey respondents.



**Observations**

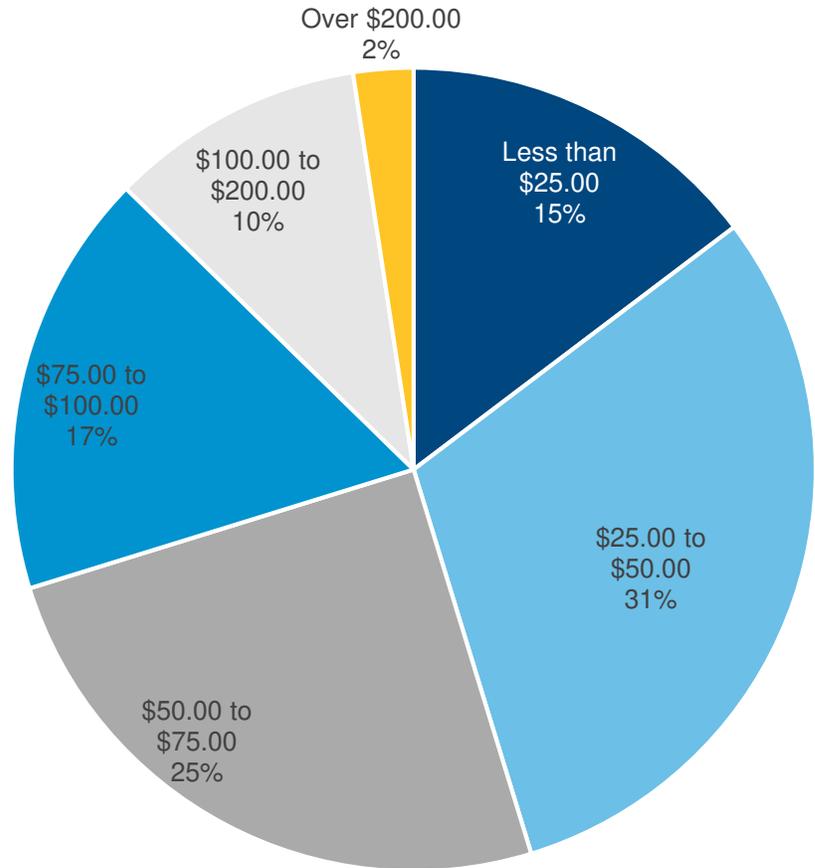
- The nature of this question reveals the price points and merchandise categories as well as generating a list of potential recruitment targets.
- Recent market activity and nearby market coverage from existing locations may preclude recruiting these businesses.

5) Consumer Demand

**7. In an average week, how much would you estimate your household spends on meals away from home (full-service restaurants, take-out, drive-through, etc)?**

This question quantifies the amount that could be spent by respondents on various dining options in Brown Deer.

	Count
Less than \$25.00	73
<b>\$25.00 to \$50.00</b>	<b>152</b>
<b>\$50.00 to \$75.00</b>	<b>124</b>
\$75.00 to \$100.00	85
\$100.00 to \$200.00	51
Over \$200.00	12



Observations

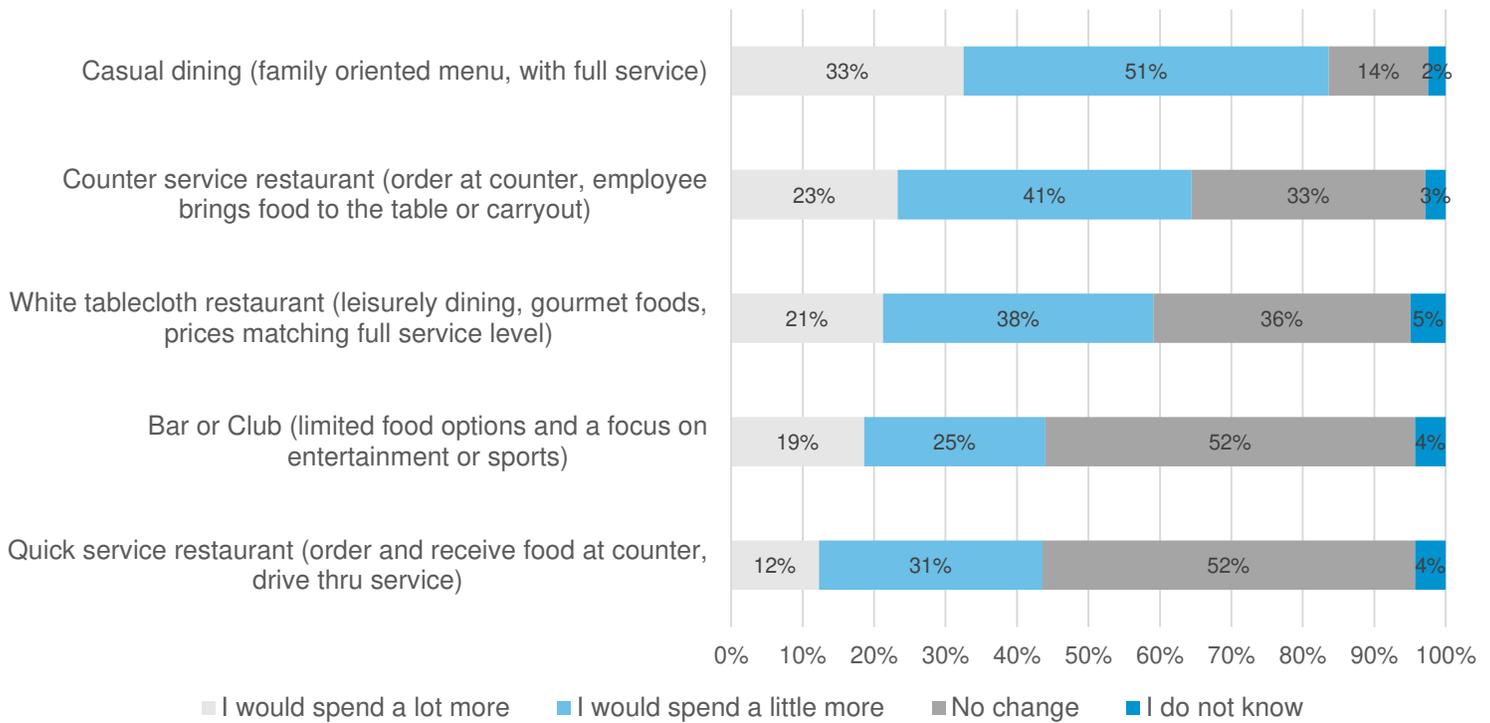
- The question reveals the spending activity of respondents as it relates to dining. With previous questions revealing a large desire for additional dining options, the majority of respondents spend between \$25 to \$75 on dining every week.
- The price point provides additional clarity surrounding the types of restaurants that should be targeted, perhaps suggesting additional fast casual and casual restaurant options in the area.

5) Consumer Demand

**8. How would the addition of these restaurants affect the amount you spend in Brown Deer?**

This question provides information on the most desirable new restaurant categories.

	I would spend a lot more	I would spend a little more	No change	I do not know	Response Count
Casual dining (family oriented menu, with full service)	159	250	68	12	489
Counter service restaurant (order at counter, employee brings food to the table or carryout)	114	201	160	14	489
White tablecloth restaurant (leisurely dining, gourmet foods, prices matching full service level)	104	185	176	24	489
Bar or Club (limited food options and a focus on entertainment or sports)	91	124	253	21	489
Quick service restaurant (order and receive food at counter, drive thru service)	60	153	255	21	489



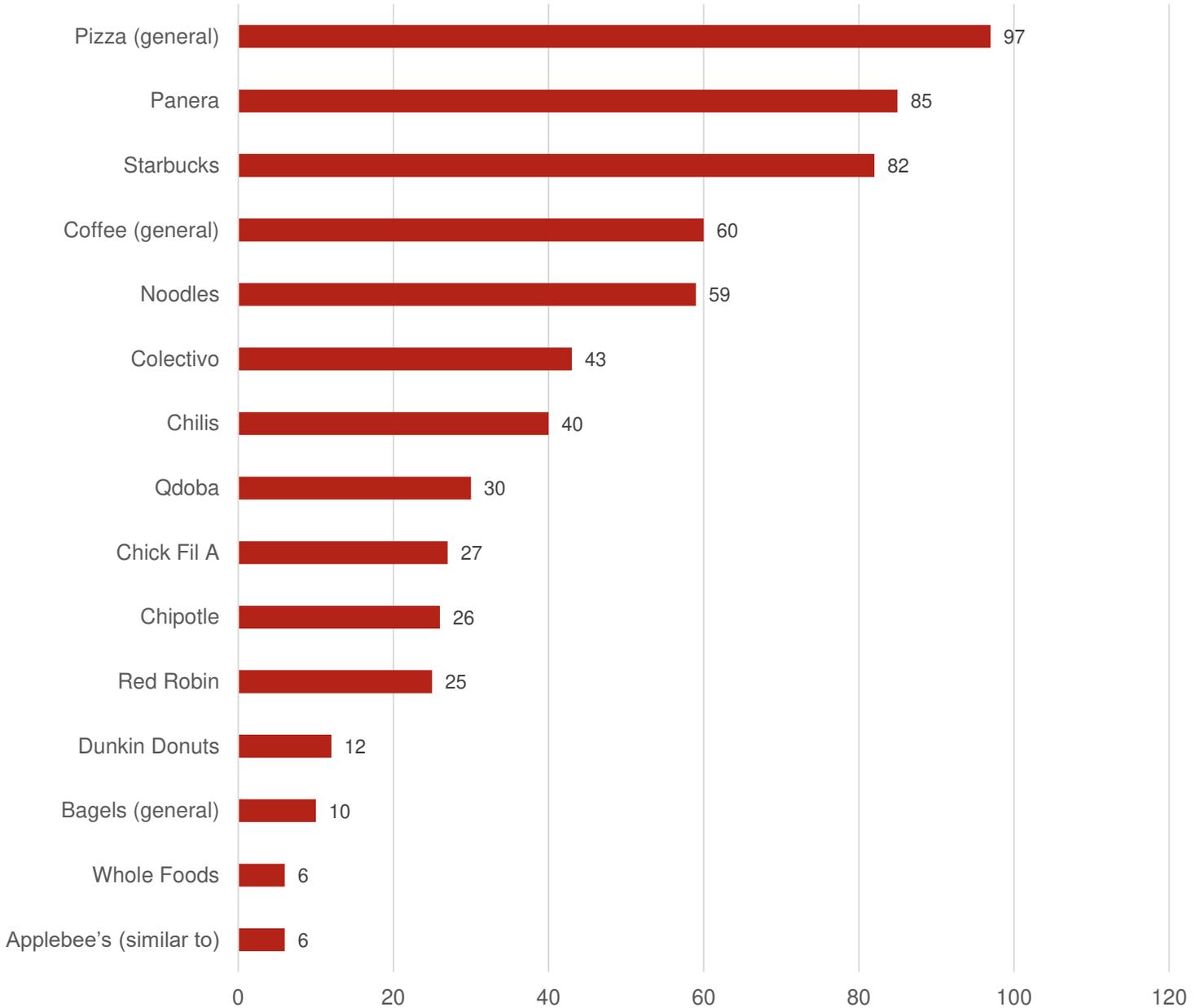
**Observations**

- The question assesses the effect that the inclusion of new restaurants, depending on type, has on the respondent’s future spending.
- 84 percent of respondents report that they would spend more money if casual dining were added to the retail mix in Brown Deer.
- Recruitment efforts can be focused to target casual dining and counter service restaurants as the potential spending increases are highest for these two categories.

5) Consumer Demand

**9. In the past month, what non-Brown Deer restaurants did you frequent that you believe would be good additions to Brown Deer?**

This question provides tenant suggestions for multiple dining formats. For the most patronized restaurants by numbers of responses see below.



**Observations**

- Existing businesses could use the requested formats to gain direction for specials and advertising.
- The goal is not to move requested restaurants but to get experienced operators to open a second location in Brown Deer.

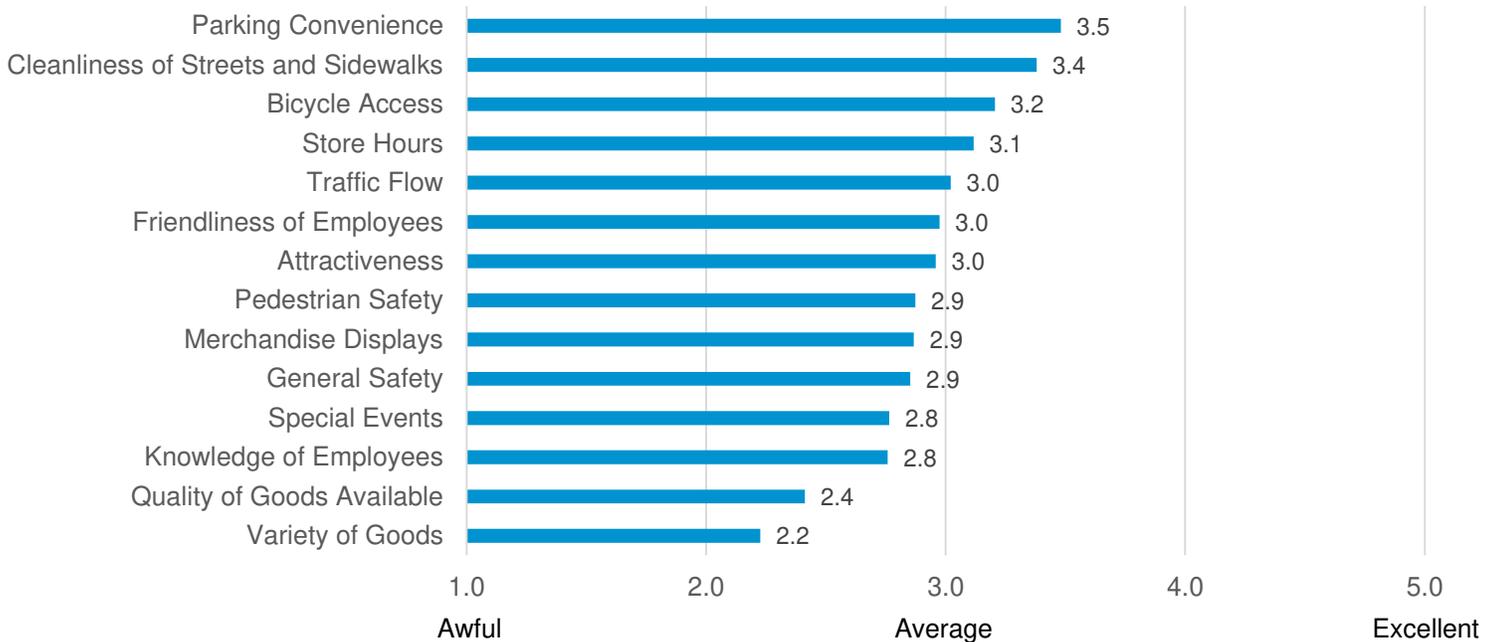
5) Consumer Demand

**10. Rate your overall satisfaction with these factors as they apply to Brown Deer:**

This question provides general guidance on elements of the general Brown Deer experience. The summary table and accompanying graph compare the ratings of “Excellent” and “Very Good” for each factor.

	Awful	Below Average	Average	Above Average	Excellent	I do not know	Response Count
General Safety	36	123	<b>179</b>	76	27	3	444
Cleanliness of Streets and Sidewalks	<b>9</b>	48	193	147	43	4	444
Friendliness of Employees	38	<b>76</b>	203	83	29	15	444
Attractiveness	19	<b>99</b>	219	83	18	6	444
Pedestrian Safety	<b>31</b>	109	198	76	20	10	444
Bicycle Access	18	<b>74</b>	143	118	36	55	444
Special Events	<b>34</b>	125	161	70	14	40	444
Quality of Goods Available	59	<b>175</b>	175	25	5	5	444
Knowledge of Employees	<b>42</b>	79	226	42	12	43	444
Parking Convenience	10	<b>18</b>	205	160	44	7	444
Merchandise Displays	<b>14</b>	71	292	30	7	30	444
Store Hours	5	<b>36</b>	317	61	18	7	444
Traffic Flow	<b>27</b>	49	263	76	18	11	444
Variety of Goods	84	<b>192</b>	145	13	4	6	444

**Aggregate Weighted Score**



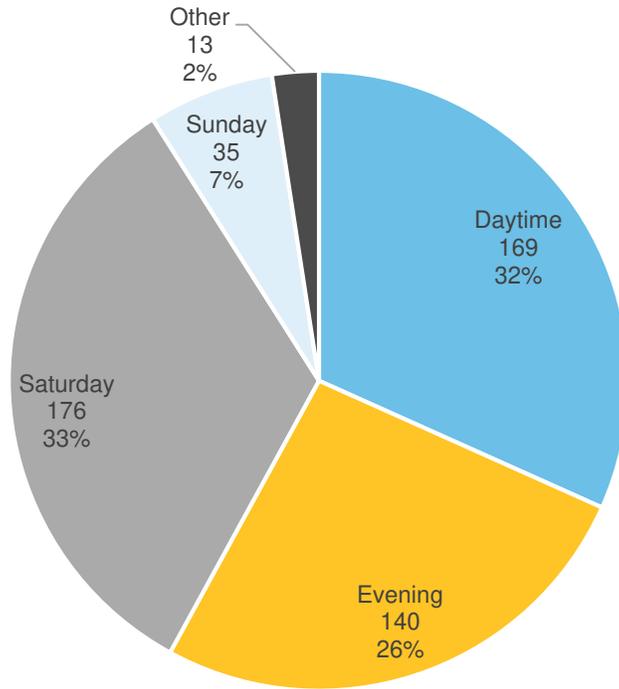
**Observations**

- The two largest points of discontent of respondents pertains to the quality and variety of goods available within Brown Deer. This is shown most clearly by the aggregate weighted score.

5) Consumer Demand

### 11. When is it the most convenient time for you to shop?

This question seeks to clarify the optimal operating hours for Brown Deer businesses.



#### Observations

- Combined, 65 percent of the market finds “Daytime” or “Saturday” as the most convenient time to shop.
- “Sunday” does not appear to be desirable time to shop, which could aid in recruitment efforts of businesses not wanting to operate 7 days a week.

5) Consumer Demand

Sample Characteristics Questions

**12. How long have you lived in Brown Deer?**

	Responses	%
Less than 1 year	12	3%
1 to 5 years	70	17%
5 to 10 years	65	16%
10 or more years	237	58%
I do not live in Brown Deer	27	7%

**13. If you are employed, please tell us how frequently you work from home.**

	Responses	%
Never	234	57%
Less than 20%	97	24%
Between 20% and 50%	29	7%
Over 50%	28	7%
Home based business	20	5%

**14. Choose the answer that best describes your household:**

	Responses	%
I live alone	31	8%
Empty nester	62	15%
Double income, no kids	79	19%
Adult roommates	15	4%
Family with children	223	54%

**15. Please choose the category that best describes how you travel in Brown Deer to shop and dine:**

	Responses	%
I walk	2	0%
I bicycle	0	0%
I drive in 5 minutes or less	326	76%
I drive, but it takes 10 or more minutes	102	24%

## 5) Consumer Demand

**16. Please choose the category that best matches your age:**

	Responses	%
Under 20	8	2%
20 to 24	10	2%
25 to 34	75	17%
35 to 44	151	34%
45 to 54	96	22%
55 to 64	69	16%
65 to 74	26	6%
75 or older	7	2%

**17. Please provide the category of which your employer falls:**

	Responses	%
Technology	36	8%
Education & Health Services	115	27%
Financial Activities	28	7%
Manufacturing	41	10%
Construction	9	2%
Insurance	14	3%
Unemployed	18	4%
Government	22	5%
Retail	17	4%
Retired	21	5%
Other	109	25%

**18. If employed, please provide the zip code of your current employer:**

Top 10 Zip Codes	Responses
53223 (Milwaukee/Brown Deer)	62
53209 (Milwaukee/ Glendale)	37
53217 (Milwaukee/ North Shore)	25
53202 (Milwaukee/ Central Business District)	24
53092 (Milwaukee/ Mequon)	21
53051 (Menomonee Falls)	18
53226 (Wauwatosa)	16
53224 (Milwaukee)	12
53211 (Milwaukee/ East Side_Shorewood)	10
53212 (Milwaukee/ East Side_Shorewood)	9

## Retail Leakage Analysis

### Overview

Colliers examined a variety of retail categories, provided by ESRI, to determine target retail categories within the Village of Brown Deer using the following 3-step method.

#### Step 1: Identify retail trade areas

- Neighborhood Serving Retail: the primary demand analysis for the retail potential is based on neighborhood serving retail and primary and secondary market areas. This demand is independent of the potential demand for a regional big box retailer.
  - Primary Trade Area: represents the primary area from which the majority of the Village of Brown Deer retail demand is derived. Recall, for this analysis is defined as a five minute drive to one of the retail corridors that exist within the Village of Brown Deer.
  - Secondary Trade Area: represents the secondary area from which a significant amount of supplemental demand is derived. Accounts for the area within a ten minute drive to one the already existing retail corridors.
- Regional Big Box Retail Trade Area: represents a separate demand analysis based on the typical area from which majority of demand for big box retailers is derived. Based on the availability of space within the Village, this analysis will not be performed as Big-Box is not the best use of space and resources for the Village at this time.

#### Step 2: Analyze the existing retail demand (expenditures) and retail supply (sales) of each retail category (for both retail types described above)

- Retail Demand: Retail potential of households (expenditures) within the designated trade area.
- Retail Supply: Retail sales of existing retailers within the designated trade area.

#### Step 3: Determine the retail gap of each retail category

- Retail Gap: Difference between retail demand and retail supply within each designated trade area.
  - Retail Surplus: Retail supply exceeds retail demand. The market is oversupplied and will result in a negative value for the retail gap.
  - Retail Leakage: Retail demand exceeds retail supply. The market is undersupplied and results in a positive value for the retail gap.

### Neighborhood Serving Retail

Previously identified in the Demographic & Economic Profile, the Village of Brown Deer Trade Area, along with the Primary and Secondary Trade Areas will be examined in the retail leakage analysis. It is important to note that the supply, demand, and leakage findings for the trade areas are defined for this analysis through research and consumer interviews.

6) Retail Leakage Analysis

**Village of Brown Deer**

Industry Group	Demand (Retail Potential)	Supply (Retail Sales)	Retail Gap	Leakage/Surplus Factor
Motor Vehicle & Parts Dealers	\$41,462,435	\$14,715,644	\$26,746,791	47.6
Automobile Dealers	\$33,407,545	\$14,715,644	\$18,691,901	38.8
Other Motor Vehicle Dealers	\$5,499,424	\$0	\$5,499,424	100.0
Auto Parts, Accessories & Tire Stores	\$2,555,466	\$0	\$2,555,466	100.0
Furniture & Home Furnishings Stores	\$5,083,534	\$4,371,935	\$711,599	7.5
Furniture Stores	\$3,264,264	\$3,103,910	\$160,354	2.5
Home Furnishings Stores	\$1,819,270	\$1,268,025	\$551,245	17.9
Electronics & Appliance Stores	\$10,506,861	\$15,896,058	(\$5,389,197)	-20.4
Bldg Materials, Garden Equip. & Supply Stores	\$8,936,926	\$0	\$8,936,926	100.0
Bldg Material & Supplies Dealers	\$7,202,208	\$0	\$7,202,208	100.0
Lawn & Garden Equip & Supply Stores	\$1,734,718	\$0	\$1,734,718	100.0
Food & Beverage Stores	\$30,145,086	\$23,176,576	\$6,968,510	13.1
Grocery Stores	\$26,823,811	\$20,537,241	\$6,286,570	13.3
Specialty Food Stores	\$2,084,100	\$0	\$2,084,100	100.0
Beer, Wine & Liquor Stores	\$1,237,175	\$2,639,335	(\$1,402,160)	-36.2
Health & Personal Care Stores	\$12,979,815	\$13,338,327	(\$358,512)	-1.4
Gasoline Stations	\$13,967,877	\$8,047,527	\$5,920,350	26.9
Clothing & Clothing Accessories Stores	\$7,768,189	\$9,713,850	(\$1,945,661)	-11.1
Clothing Stores	\$4,667,361	\$8,804,809	(\$4,137,448)	-30.7
Shoe Stores	\$1,323,570	\$909,041	\$414,529	18.6
Jewelry, Luggage & Leather Goods Stores	\$1,777,258	\$0	\$1,777,258	100.0
Sporting Goods, Hobby, Book & Music Stores	\$4,602,252	\$6,627,589	(\$2,025,337)	-18.0
Sporting Goods/Hobby/Musical Instr Stores	\$3,569,305	\$6,627,589	(\$3,058,284)	-30.0
Book, Periodical & Music Stores	\$1,032,947	\$0	\$1,032,947	100.0
General Merchandise Stores	\$33,343,564	\$78,122,304	(\$44,778,740)	-40.2
Department Stores Excluding Leased Depts.	\$28,009,698	\$77,279,183	(\$49,269,485)	-46.8
Other General Merchandise Stores	\$5,333,866	\$843,121	\$4,490,745	72.7
Miscellaneous Store Retailers	\$6,515,843	\$4,938,759	\$1,577,084	13.8
Florists	\$277,369	\$155,892	\$121,477	28.0
Office Supplies, Stationery & Gift Stores	\$1,812,817	\$4,414,842	(\$2,602,025)	-41.8
Used Merchandise Stores	\$1,043,706	\$368,025	\$675,681	47.9
Other Miscellaneous Store Retailers	\$3,381,951	\$0	\$3,381,951	100.0
Nonstore Retailers	\$4,114,919	\$2,691,503	\$1,423,416	20.9
Electronic Shopping & Mail-Order Houses	\$2,849,067	\$2,691,503	\$157,564	2.8
Vending Machine Operators	\$449,704	\$0	\$449,704	100.0
Direct Selling Establishments	\$816,148	\$0	\$816,148	100.0
Food Services & Drinking Places	\$18,662,057	\$19,156,157	(\$494,100)	-1.3
Full-Service Restaurants	\$9,957,961	\$8,161,914	\$1,796,047	9.9
Limited-Service Eating Places	\$7,275,212	\$9,853,352	(\$2,578,140)	-15.1
Special Food Services	\$410,866	\$703,753	(\$292,887)	-26.3
Drinking Places - Alcoholic Beverages	\$1,018,018	\$437,138	\$580,880	39.9

## 6) Retail Leakage Analysis

## Primary Trade Area

Industry Group	Demand (Retail Potential)	Supply (Retail Sales)	Retail Gap	Leakage/Surplus Factor
Motor Vehicle & Parts Dealers	\$102,972,613	\$154,543,398	(\$51,570,785)	-20.0
Automobile Dealers	\$83,124,521	\$141,810,831	(\$58,686,310)	-26.1
Other Motor Vehicle Dealers	\$13,390,584	\$0	\$13,390,584	100.0
Auto Parts, Accessories & Tire Stores	\$6,457,507	\$12,732,566	(\$6,275,059)	-32.7
Furniture & Home Furnishings Stores	\$12,924,966	\$21,610,765	(\$8,685,799)	-25.2
Furniture Stores	\$8,364,451	\$8,452,188	(\$87,737)	-0.5
Home Furnishings Stores	\$4,560,515	\$13,158,577	(\$8,598,062)	-48.5
Electronics & Appliance Stores	\$26,605,275	\$60,315,756	(\$33,710,481)	-38.8
Bldg Materials, Garden Equip. & Supply Stores	\$22,466,624	\$23,618,594	(\$1,151,970)	-2.5
Bldg Material & Supplies Dealers	\$18,285,563	\$20,849,492	(\$2,563,929)	-6.6
Lawn & Garden Equip & Supply Stores	\$4,181,061	\$2,769,101	\$1,411,960	20.3
Food & Beverage Stores	\$77,219,616	\$50,829,745	\$26,389,871	20.6
Grocery Stores	\$68,716,298	\$44,367,221	\$24,349,077	21.5
Specialty Food Stores	\$5,341,268	\$988,833	\$4,352,435	68.8
Beer, Wine & Liquor Stores	\$3,162,049	\$5,473,691	(\$2,311,642)	-26.8
Health & Personal Care Stores	\$32,757,955	\$35,826,115	(\$3,068,160)	-4.5
Gasoline Stations	\$35,366,476	\$28,464,326	\$6,902,150	10.8
Clothing & Clothing Accessories Stores	\$20,121,015	\$35,724,005	(\$15,602,990)	-27.9
Clothing Stores	\$12,115,880	\$14,464,044	(\$2,348,164)	-8.8
Shoe Stores	\$3,462,644	\$20,991,294	(\$17,528,650)	-71.7
Jewelry, Luggage & Leather Goods Stores	\$4,542,492	\$268,668	\$4,273,824	88.8
Sporting Goods, Hobby, Book & Music Stores	\$11,627,114	\$18,124,648	(\$6,497,534)	-21.8
Sporting Goods/Hobby/Musical Instr Stores	\$8,945,020	\$15,422,454	(\$6,477,434)	-26.6
Book, Periodical & Music Stores	\$2,682,094	\$2,702,194	(\$20,100)	-0.4
General Merchandise Stores	\$85,346,124	\$169,852,242	(\$84,506,118)	-33.1
Department Stores Excluding Leased Depts.	\$71,754,089	\$116,229,183	(\$44,475,094)	-23.7
Other General Merchandise Stores	\$13,592,035	\$53,623,059	(\$40,031,024)	-59.6
Miscellaneous Store Retailers	\$16,577,949	\$25,785,233	(\$9,207,284)	-21.7
Florists	\$670,564	\$879,169	(\$208,605)	-13.5
Office Supplies, Stationery & Gift Stores	\$4,613,723	\$4,743,259	(\$129,536)	-1.4
Used Merchandise Stores	\$2,686,682	\$502,792	\$2,183,890	68.5
Other Miscellaneous Store Retailers	\$8,606,980	\$19,660,013	(\$11,053,033)	-39.1
Nonstore Retailers	\$10,338,645	\$5,406,780	\$4,931,865	31.3
Electronic Shopping & Mail-Order Houses	\$7,241,190	\$5,008,035	\$2,233,155	18.2
Vending Machine Operators	\$1,152,772	\$0	\$1,152,772	100.0
Direct Selling Establishments	\$1,944,682	\$398,746	\$1,545,936	66.0
Food Services & Drinking Places	\$47,760,251	\$48,290,817	(\$530,566)	-0.6
Full-Service Restaurants	\$25,500,827	\$18,222,698	\$7,278,129	16.6
Limited-Service Eating Places	\$18,596,036	\$27,116,978	(\$8,520,942)	-18.6
Special Food Services	\$1,036,986	\$1,210,893	(\$173,907)	-7.7
Drinking Places - Alcoholic Beverages	\$2,626,402	\$1,740,248	\$886,154	20.3

## 6) Retail Leakage Analysis

## Secondary Trade Area

Industry Group	Demand (Retail Potential)	Supply (Retail Sales)	Retail Gap	Leakage/Surplus Factor
Motor Vehicle & Parts Dealers	\$448,865,462	\$618,052,262	(\$169,186,800)	-15.9
Automobile Dealers	\$361,147,982	\$572,881,563	(\$211,733,581)	-22.7
Other Motor Vehicle Dealers	\$59,727,587	\$13,739,885	\$45,987,702	62.6
Auto Parts, Accessories & Tire Stores	\$27,989,892	\$31,430,813	(\$3,440,921)	-5.8
Furniture & Home Furnishings Stores	\$56,484,662	\$47,835,423	\$8,649,239	8.3
Furniture Stores	\$36,464,723	\$13,648,483	\$22,816,240	45.5
Home Furnishings Stores	\$20,019,939	\$34,186,939	(\$14,167,000)	-26.1
Electronics & Appliance Stores	\$115,411,888	\$125,215,765	(\$9,803,877)	-4.1
Bldg Materials, Garden Equip. & Supply Stores	\$101,004,224	\$57,771,877	\$43,232,347	27.2
Bldg Material & Supplies Dealers	\$82,623,305	\$39,701,130	\$42,922,175	35.1
Lawn & Garden Equip & Supply Stores	\$18,380,919	\$18,070,747	\$310,172	0.9
Food & Beverage Stores	\$329,798,932	\$305,505,192	\$24,293,740	3.8
Grocery Stores	\$293,328,816	\$277,841,078	\$15,487,738	2.7
Specialty Food Stores	\$22,788,221	\$10,540,655	\$12,247,566	36.7
Beer, Wine & Liquor Stores	\$13,681,895	\$17,123,460	(\$3,441,565)	-11.2
Health & Personal Care Stores	\$141,969,682	\$109,015,028	\$32,954,654	13.1
Gasoline Stations	\$151,164,764	\$96,703,895	\$54,460,869	22.0
Clothing & Clothing Accessories Stores	\$86,895,848	\$71,212,598	\$15,683,250	9.9
Clothing Stores	\$52,151,192	\$38,156,971	\$13,994,221	15.5
Shoe Stores	\$14,690,271	\$28,081,972	(\$13,391,701)	-31.3
Jewelry, Luggage & Leather Goods Stores	\$20,054,385	\$4,973,655	\$15,080,730	60.3
Sporting Goods, Hobby, Book & Music Stores	\$50,780,315	\$47,656,299	\$3,124,016	3.2
Sporting Goods/Hobby/Musical Instr Stores	\$39,192,937	\$41,825,815	(\$2,632,878)	-3.2
Book, Periodical & Music Stores	\$11,587,378	\$5,830,483	\$5,756,895	33.1
General Merchandise Stores	\$367,949,970	\$260,194,155	\$107,755,815	17.2
Department Stores Excluding Leased Depts.	\$309,685,166	\$159,576,493	\$150,108,673	32.0
Other General Merchandise Stores	\$58,264,804	\$100,617,662	(\$42,352,858)	-26.7
Miscellaneous Store Retailers	\$71,560,977	\$62,455,592	\$9,105,385	6.8
Florists	\$2,991,351	\$2,416,397	\$574,954	10.6
Office Supplies, Stationery & Gift Stores	\$20,007,918	\$7,093,678	\$12,914,240	47.7
Used Merchandise Stores	\$11,626,842	\$8,846,732	\$2,780,110	13.6
Other Miscellaneous Store Retailers	\$36,934,866	\$44,098,785	(\$7,163,919)	-8.8
Nonstore Retailers	\$44,428,107	\$14,264,944	\$30,163,163	51.4
Electronic Shopping & Mail-Order Houses	\$31,263,453	\$13,007,249	\$18,256,204	41.2
Vending Machine Operators	\$4,921,715	\$0	\$4,921,715	100.0
Direct Selling Establishments	\$8,242,939	\$1,033,901	\$7,209,038	77.7
Food Services & Drinking Places	\$206,371,544	\$131,508,131	\$74,863,413	22.2
Full-Service Restaurants	\$110,386,651	\$61,207,526	\$49,179,125	28.7
Limited-Service Eating Places	\$80,161,790	\$62,558,309	\$17,603,481	12.3
Special Food Services	\$4,529,326	\$3,041,724	\$1,487,602	19.6
Drinking Places - Alcoholic Beverages	\$11,293,777	\$4,700,573	\$6,593,204	41.2

6) Retail Leakage Analysis

Side by Side Comparison

Industry Group	Retail Gap			Leakage/Surplus Factor		
	Village of Brown Deer	Primary Trade Area	Secondary Trade Area	Village of Brown Deer	Primary Trade Area	Secondary Trade Area
Motor Vehicle & Parts Dealers	\$26,746,791	(\$51,570,785)	(\$169,186,800)	47.6	-20.0	-15.9
Automobile Dealers	\$18,691,901	(\$58,686,310)	(\$211,733,581)	38.8	-26.1	-22.7
Other Motor Vehicle Dealers	\$5,499,424	\$13,390,584	\$45,987,702	100.0	100.0	62.6
Auto Parts, Accessories & Tire Stores	\$2,555,466	(\$6,275,059)	(\$3,440,921)	100.0	-32.7	-5.8
Furniture & Home Furnishings Stores	\$711,599	(\$8,685,799)	\$8,649,239	7.5	-25.2	8.3
Furniture Stores	\$160,354	(\$87,737)	\$22,816,240	2.5	-0.5	45.5
Home Furnishings Stores	\$551,245	(\$8,598,062)	(\$14,167,000)	17.9	-48.5	-26.1
Electronics & Appliance Stores	(\$5,389,197)	(\$33,710,481)	(\$9,803,877)	-20.4	-38.8	-4.1
Bldg Materials, Garden Equip. & Supply Stores	\$8,936,926	(\$1,151,970)	\$43,232,347	100.0	-2.5	27.2
Bldg Material & Supplies Dealers	\$7,202,208	(\$2,563,929)	\$42,922,175	100.0	-6.6	35.1
Lawn & Garden Equip & Supply Stores	\$1,734,718	\$1,411,960	\$310,172	100.0	20.3	0.9
Food & Beverage Stores	\$6,968,510	\$26,389,871	\$24,293,740	13.1	20.6	3.8
Grocery Stores	\$6,286,570	\$24,349,077	\$15,487,738	13.3	21.5	2.7
Specialty Food Stores	\$2,084,100	\$4,352,435	\$12,247,566	100.0	68.8	36.7
Beer, Wine & Liquor Stores	(\$1,402,160)	(\$2,311,642)	(\$3,441,565)	-36.2	-26.8	-11.2
Health & Personal Care Stores	(\$358,512)	(\$3,068,160)	\$32,954,654	-1.4	-4.5	13.1
Gasoline Stations	\$5,920,350	\$6,902,150	\$54,460,869	26.9	10.8	22.0
Clothing & Clothing Accessories Stores	(\$1,945,661)	(\$15,602,990)	\$15,683,250	-11.1	-27.9	9.9
Clothing Stores	(\$4,137,448)	(\$2,348,164)	\$13,994,221	-30.7	-8.8	15.5
Shoe Stores	\$414,529	(\$17,528,650)	(\$13,391,701)	18.6	-71.7	-31.3
Jewelry, Luggage & Leather Goods Stores	\$1,777,258	\$4,273,824	\$15,080,730	100.0	88.8	60.3
Sporting Goods, Hobby, Book & Music Stores	(\$2,025,337)	(\$6,497,534)	\$3,124,016	-18.0	-21.8	3.2
Sporting Goods/Hobby/Musical Instr Stores	(\$3,058,284)	(\$6,477,434)	(\$2,632,878)	-30.0	-26.6	-3.2
Book, Periodical & Music Stores	\$1,032,947	(\$20,100)	\$5,756,895	100.0	-0.4	33.1
General Merchandise Stores	(\$44,778,740)	(\$84,506,118)	\$107,755,815	-40.2	-33.1	17.2
Department Stores Excluding Leased Depts.	(\$49,269,485)	(\$44,475,094)	\$150,108,673	-46.8	-23.7	32.0
Other General Merchandise Stores	\$4,490,745	(\$40,031,024)	(\$42,352,858)	72.7	-59.6	-26.7
Miscellaneous Store Retailers	\$1,577,084	(\$9,207,284)	\$9,105,385	13.8	-21.7	6.8
Florists	\$121,477	(\$208,605)	\$574,954	28.0	-13.5	10.6
Office Supplies, Stationery & Gift Stores	(\$2,602,025)	(\$129,536)	\$12,914,240	-41.8	-1.4	47.7
Used Merchandise Stores	\$675,681	\$2,183,890	\$2,780,110	47.9	68.5	13.6
Other Miscellaneous Store Retailers	\$3,381,951	(\$11,053,033)	(\$7,163,919)	100.0	-39.1	-8.8
Nonstore Retailers	\$1,423,416	\$4,931,865	\$30,163,163	20.9	31.3	51.4
Electronic Shopping & Mail-Order Houses	\$157,564	\$2,233,155	\$18,256,204	2.8	18.2	41.2
Vending Machine Operators	\$449,704	\$1,152,772	\$4,921,715	100.0	100.0	100.0
Direct Selling Establishments	\$816,148	\$1,545,936	\$7,209,038	100.0	66.0	77.7
Food Services & Drinking Places	(\$494,100)	(\$530,566)	\$74,863,413	-1.3	-0.6	22.2
Full-Service Restaurants	\$1,796,047	\$7,278,129	\$49,179,125	9.9	16.6	28.7
Limited-Service Eating Places	(\$2,578,140)	(\$8,520,942)	\$17,603,481	-15.1	-18.6	12.3
Special Food Services	(\$292,887)	(\$173,907)	\$1,487,602	-26.3	-7.7	19.6
Drinking Places - Alcoholic Beverages	\$580,880	\$886,154	\$6,593,204	39.9	20.3	41.2

6) Retail Leakage Analysis

## Summary Conclusions

### Neighborhood Serving Retail Conclusions

Key observations and findings from the neighborhood serving retail leakage analysis for the Village of Brown Deer and its Primary and Secondary Trade Areas are as follows:

- The majority of retail categories within the Village of Brown Deer and the Secondary Trade Area are experiencing a retail leakage.
- The Primary Trade Area is underserved in food related categories, including but not limited to Food & Beverage Stores, Grocery Stores, and Full-Service Restaurants.
- The largest retail leakage categories, by dollar amount, for each of the trade areas are outlined in the table that follows, with the majority of leakage occurring in the logical markets of food, restaurants, transportation, and apparel and services:

**Top 10 Neighborhood Serving Retail Leakage Categories**

Village of Brown Deer		Primary Trade Area		Secondary Trade Area	
Motor Vehicle & Parts Dealers	\$26,746,791	Food & Beverage Stores	\$26,389,871	Department Stores Excluding Leased Depts.	\$150,108,673
Automobile Dealers	\$18,691,901	Grocery Stores	\$24,349,077	General Merchandise Stores	\$107,755,815
Bldg Materials, Garden Equip. & Supply Stores	\$8,936,926	Other Motor Vehicle Dealers	\$13,390,584	Food Services & Drinking Places	\$74,863,413
Bldg Material & Supplies Dealers	\$7,202,208	Full-Service Restaurants	\$7,278,129	Gasoline Stations	\$54,460,869
Food & Beverage Stores	\$6,968,510	Gasoline Stations	\$6,902,150	Full-Service Restaurants	\$49,179,125
Grocery Stores	\$6,286,570	Nonstore Retailers	\$4,931,865	Other Motor Vehicle Dealers	\$45,987,702
Gasoline Stations	\$5,920,350	Specialty Food Stores	\$4,352,435	Bldg Materials, Garden Equip. & Supply Stores	\$43,232,347
Other Motor Vehicle Dealers	\$5,499,424	Jewelry, Luggage & Leather Goods Stores	\$4,273,824	Bldg Material & Supplies Dealers	\$42,922,175
Other General Merchandise Stores	\$4,490,745	Electronic Shopping & Mail-Order Houses	\$2,233,155	Health & Personal Care Stores	\$32,954,654
Other Miscellaneous Store Retailers	\$3,381,951	Used Merchandise Stores	\$2,183,890	Nonstore Retailers	\$30,163,163

## Proposed Retail Categories

The purpose of this retail assessment is to identify retailers who, given the current market conditions are likely to succeed in the local retail environment. In order to identify what types of retailers might fit into the market, the following analysis is performed:

- Examine what types of retailers are missing from the Market.
- Address the desires of survey respondents, by examining what requests are sustainable and achievable within this community.
- Understand where retail leakage exists and what will bring demand back to the Market.
- Find growth opportunities and understand how leveraging the success of retailers already in the community can draw additional business and new businesses.

Based on the current retail mix, consumer survey results, and retail leakage, Colliers International | Wisconsin, proposes the following retail categories to the Village of Brown Deer. Through understanding the area and taking into consideration the opinion of a retail broker active in the local market, the proposed retail categories are separated into levels, based on the strength of support for the general use. An explanation of each level, Level 1, Level 2, and Level 3 is found below, with Level 1 having the strongest support. For each retail category the justification is explained in the pages that follow.

### Level 1

Level 1 retail categories are the categories that have the strongest support. Considering the consumer surveys, retail leakage analysis, and the opinions of brokers, support is defined. Most of the categories in this level have strong support from at least two of the three metrics, if not all three. These are the categories that ought to be considered first.

### Level 2

Level 2 retail categories still have strong support, but not as much as Level 1. Retailers in these categories are likely to be successful in the market, but either not all the metrics are in agreement or some metrics are not available for these categories. Retailers that fall into these categories are strong candidates to be added to the retail mix.

### Level 3

The support for Level 3 categories is the weakest of the three levels, but retailers that fall under these categories should still be considered. For many of these categories, the leakage analysis is either not available or does not support inclusion in the retail mix. However, the survey respondents show a strong demand for these categories. Often if the right retailer is found, they have the potential to be successful in the market. It is for this reason, that these categories are included in the proposed retail categories.

7) Proposed Retail Categories

## Level 1

Retail Category	Justification
Dining	With limited dining options in the area, the conclusions of the survey and leakage analysis, suggest that additional dining options are not only highly desired in the area, but that the primary Trade Area would be able to support this retail category. Depending on the type of dining that is desired, different requirements in terms of parking, location, and type of building will need to be satisfied in order to attract retailers.
Coffee / Bakery	Not currently included in the retail mix, respondents prefer to travel no more than five minutes to a coffee shop / bakery. For this category there is significant retail leakage, and there are positive survey responses that show a majority of respondents wanting a coffee shop/ bakery in the Village of Brown Deer’s retail mix. This type of business would need to be located in a high traffic area, ideally along common commute routes.
Pet Stores	Again survey respondents show there being strong demand for pet stores. Not only are pet stores an attractive business model, but this type of retailer would be the first of this category in the area. While there is no retail leakage data available for this type of use, the lack of offerings in the area, and the demand that is shown through the survey results shows that this is a use that could be successful in the area.
Fitness	While not included in the retail analysis or the survey questions, fitness facilities match with the local demographics. The median income and age match the target demographic of low cost large gym facilities.
Specialty Food Stores	Specialty Food Stores are highly desired within the community. Not only does the survey suggest this, but it is also supported by the leakage analysis. With the category obsolete from the Trade Area, there is significant opportunity for a user to enter the market. Additionally, Brown Deer is seen as a market that has the potential for this type of store to not only enter the market but also to be able to expand.
Hardware	Hardware was one category where respondents would have liked to purchase their items within Brown Deer, rather than traveling to Menomonee Falls or Mequon. The leakage analysis is very strong in favor of adding this category to the retail mix in both the Village and Secondary Trade Areas. Compared to a big box hardware store, a smaller hardware store would be a better fit for the market.
Entertainment	The survey results show that entertainment is highly desired by residents. Its inclusion into the retail mix, could draw consumers from the Secondary Trade Area and beyond if the right user is found. It is unlikely that a Movie Theater would locate in the market, but there may be opportunity for kids indoor trampoline park, play park or similar entertainment type businesses.

7) Proposed Retail Categories

## Level 2

Retail category	Justification
Dog Daycare / Kennel	Along with Pet Stores, in an area that has a high pet owning population, this could be a successful use for the Village of Brown Deer. Because the category is narrow in focus, there is no leakage analysis available, but this is currently not a offering that is available with the Village of Brown Deer Trade Area. Not only is this category not currently available, but these types of offerings are becoming very popular around the Milwaukee Metropolitan Area.
Household Items	Driving the proposal for inclusion of household item stores within the retail mix is strong survey response. Decent leakage exists for this category, through not as strong as some of the other categories. The demand coming directly from the Village of Brown Deer is strong but decreases once the primary and secondary Trade Areas are also considered. These types of retailers prefer to co-tenant with larger national users, of which Brown Deer has a couple.
Furniture Store	The leakage in this category is decent. There may be opportunities in this market for used furniture stores, which are slightly smaller in size. Mattress Stores also show potential within this category as national, regional, and local users could be attracted to the market.
Craft Brewery	Not included in the survey as an individual category is the idea of a craft brewery within the Village of Brown Deer. A category that has become increasingly popular within Milwaukee, this idea is supported in the high demand for “Drinking Places – Alcoholic Beverages”. The broad category has a large retail gap in the Village, Primary, and Secondary Trade Areas. As they often operate as a restaurant or bar, the user would need to be specific to Brown Deer.
Gardening	In looking at the consumer surveys, this ranked highly in terms of what residents desired. Additionally, respondents suggested that they would be willing to spend more if this offering came to Brown Deer. With a population that are do-it-yourselfers, and a favorable retail gap, this is another category that is likely to succeed in the area. Though with Steins Garden & Home recently closing in the area, it may be difficult to attract a new retailer.

7) Proposed Retail Categories

### Level 3

Retail category	Justification
Sporting Goods	While there is some retail leakage in the category, with growing online sales, these types of stores are struggling in the market. However, because of the leakage numbers, there may be a user that is interested in the market.
Craft / Hobby	With some survey interest in this category, residents and consumers support the addition of a craft store into the market. However, with a Michael's located at Brown Deer Rd and Green Bay Rd, and a Hobby Lobby located in Menomonee Falls, it may be difficult to attract an additional retailer to the market.
Auto Parts	Auto Parts dealers like to compete with each other along the same corridor so while there are none currently located within the Village, there may be opportunity within the retail corridor at West Brown Deer Rd, as there are a couple Auto Parts stores located just west of this corridor in Milwaukee.
Florist	With strong retail leakage data, the inclusion of a florist has the potential to be successful as part of the current retail mix. However, a local user would likely have to operate as the user to be
Toy Store	Not only does the Village have an older population, but the Trade Area and Village have a good amount of school aged individuals. There are also a substantial amount of empty nesters in the market, creating more demand for a Toy Store. This category is also supported with a positive response in the survey.

## Conclusion

If Brown Deer is to become the shopping district envisioned by community residents, increase category market shares, and improve the profitability of businesses; it must add sales in existing businesses and attract additional shopping and dining venues. Through the market analysis, including the analysis of retail competition, the survey results, and the retail leakage, it became clear that residents desire several retail categories be brought to the community.

Given that Brown Deer is a highly developed area, limited venues are available for development / redevelopment. In order for the retail mix to be supportable and sustainable, growth needs to be incorporated into the existing retail corridors. Section 4 outlined available land space that is feasible for new retail. Within the Village there are 19.1 non-contiguous acres available for development/redevelopment and an additional 32,500SF of vacant in-line leasable space.

Another challenge facing retail development within the city is that its main road, Brown Deer Rd, also known as County Highway 100, is a major thoroughway for drivers looking to travel East and West. Overall, the higher speed limit results in limited stops, hurting retail along the road. In this sense, it is similar to the Capital Drive Corridor.

Considering the constraints that the Village is facing, three levels of retail categories have been proposed; each a viable retail use for the Village of Brown Deer and Trade Area. While strength for certain categories may be stronger than other, all proposed categories have the potential to be successful within the Village. With next steps including a more detailed retail mix, the proposed categories, established through the market analysis, provide a foundation and an understanding of the demand that exists within the Trade Area and the potential revenue that can be captured by retailers, both present and future.

## Glossary

<b>Anchor Tenants</b>	The major tenant, sometimes tenants in larger development, that sets the tone for the rest of the development. In strip centers this is generally a grocery store or similar, mid-box sized store.
<b>Big Box</b>	A stand-alone building that usually offers a variety of products to its customers (usually greater than 50,000 square feet)
<b>Capture Rate</b>	
<b>Contiguous Space</b>	When two spaces are adjacent to each other
<b>In line space</b>	a space that is within a strip center or neighborhood center. Usually attracts smaller tenants who benefit from being in close proximity to other retailers and businesses. Not located on the corner or end of the building.
<b>Mid-Box</b>	a space that is between 15,000 and 50,000 square feet.
<b>Neighborhood Serving Retail</b>	the primary demand analysis for the retail potential was based on neighborhood serving retail and primary and secondary market areas. This demand is independent of the potential demand for a regional big box retailer.
<b>Primary Trade Area</b>	defined within the context of this report as the area which individuals can drive five minutes or less to one of the commercial retail corridors that have been defined within. represents the primary area from which the majority of the Village of Brown Deer retail demand is derived.
<b>Regional Big Box Retail Trade Area</b>	represents a separate demand analysis based on the typical area from which majority of demand for big box retailers is derived.
<b>Retail Demand</b>	Retail potential of households (expenditures) within the designated trade area
<b>Retail Gap</b>	Difference between retail demand and retail supply within each designated trade area
<b>Retail Leakage</b>	Occurs when there is unmet demand in a trade area. Residents are spending more on goods than local businesses are able to acquire. In other words, the amount of spending that is leaving the trade area. Retail demand exceeds retail supply
<b>Retail Supply</b>	Retail sales of existing retailers within the designated trade area
<b>Retail Surplus</b>	Retail supply exceeds retail demand
<b>Secondary Trade Area</b>	similar to the Primary Trade Area, but instead of being able to drive five minutes to one of the commercial retail corridors, it is the area that requires a 10-minute drive. represents the secondary area from which a significant amount of supplemental demand is derived
<b>Small shop space</b>	a space that is less than 15,000 square feet in size