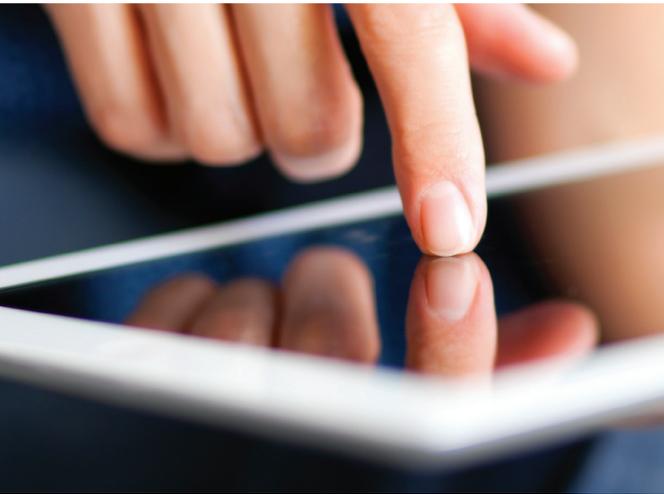


# FRANKLIN COUNTY RETAIL REPORT 2014



## An Analysis of Trends in:

- EMPLOYMENT
- SALES TAX REVENUE
- REAL ESTATE
- E-COMMERCE TRENDS & IMPACTS
- CONSUMER DEMOGRAPHICS







**Commissioner** Marilyn Brown  
President

**Commissioner** Paula Brooks

**Commissioner** John O'Grady

To the Residents of Franklin County and our partners in the Retail Sector:

Welcome to the 2014 Franklin County Retail Report, a product of the ongoing collaboration between the Franklin County Board of Commissioners, our Economic Development and Planning Department, and the Columbus Chamber of Commerce. This report details that, while the retail sector continues to be a pillar of the regional economy, there is still work to be done to ensure a full recovery from the recent recession.

This yearly Retail Report is a snapshot of what the local retail sector looks like right now. It also helps us to identify trends in the retail marketplace, and can be predictive of future successes and challenges. We believe this is valuable information for retailers to have and understand so they may tweak their business plans to steer along with existing trends. As you will see, Franklin County's retail sector is resilient; businesses are hiring and investing, and consumers are spending.

As much as any sector of the economy, retail drives Franklin County forward. Sales tax receipts make up about half of the county's yearly General Fund balance. Those are the dollars that Franklin County invests in safety and justice, vital human services, energy and environmental sustainability initiatives, and economic development and job creation. It is clear that a strong and thriving retail marketplace is important for the future of Franklin County.

Franklin County continues to be the fastest growing county in Ohio and, compared to the rest of the country, Franklin County residents tend to be younger, more urban, and more affluent. The secret to continued growth lies in targeting and unlocking the potential spending power of our young, well-educated residents who are the pulse of our university districts, thriving arts community, and of local innovation. These are the folks who start businesses, invent new technologies, and who continue to make Central Ohio the vibrant, exciting place to live that it is. A thriving retail sector, however, also needs to be inclusive of all generations and socio-economic groups; an understanding of how current trends affect everyone is what we strive to present yearly.

Thank you for your interest in this report, and for all that you do for your businesses and your community.

Remember to Buy Franklin County!

Sincerely,

Marilyn Brown  
President

Paula Brooks

John O'Grady

# FRANKLIN COUNTY RETAIL REPORT

Presented by Franklin County and the Columbus Chamber

## FRANKLIN COUNTY BOARD OF COMMISSIONERS

The Franklin County Board of Commissioners has established the Economic Development and Planning Department to promote organized growth supported by the principles of environmental responsibility, progressive land use, planning, social equity and economic vitality.

For more information on business development assistance in Franklin County please contact: the Department of Economic Development and Planning 150 South Front Street, FSL Suite 10, Columbus, Ohio, visit [Development.FranklinCountyOhio.gov](http://Development.FranklinCountyOhio.gov), call 614.525.5631 or email [edinfo@franklincountyohio.gov](mailto:edinfo@franklincountyohio.gov).

## COLUMBUS CHAMBER

The Columbus Chamber provides connections, resources and solutions to help businesses thrive. Founded 130 years ago, the Columbus Chamber has evolved to become the largest business services organization and primary advocate for the Columbus Region business community. Leveraging a customized, consultative approach to support members that range from small businesses to Fortune 500 enterprises, the Columbus Chamber is helping to grow the Columbus Region economy one business at a time.

As part of its business solutions, the Chamber maintains a wide range of information and research services. Its team of research experts studies the economy and can provide customized research reports.

To learn more about the Columbus Chamber, visit [columbus.org](http://columbus.org) or call 614.221.1321.

## FRANKLIN COUNTY RETAIL REPORT

Prepared by Jung Kim, Research Director, Columbus Chamber



As Research Director at the Columbus Chamber, Jung conducts economic and business research in support of Columbus 2020 economic development efforts and provides research services to Chamber members.

His prior experience includes Community Research Partners, a nonprofit research center based in Columbus; the State of New Jersey's Office of Smart Growth; and Strategic Planning Advice, an economics and planning consulting firm in the UK. He is a member of the American Planning Association and the Urban Land Institute. Kim has a Master of Science in regional and urban planning from the London School of Economics and a Bachelor of Arts in sociology and urban studies from Northwestern University.

Jung Kim, AICP | 614.225.6913 | [Jung\\_Kim@Columbus.org](mailto:Jung_Kim@Columbus.org)

# INTRODUCTION

After signs of a full recovery from the recession in 2012, retail in Franklin County showed mixed signals in 2013. Good news includes increasing retail employment and a continued drop in retail real estate vacancy rates. Retail categories such as motor vehicles and clothing stores have now shown four consecutive years of taxable expenditure growth. On the other hand, the county’s retail-based sales tax revenue fell back 1.9 percent in 2013 compared to the previous year, even though overall sales tax revenue rose 3.9 percent. This resumes a longer-term trend where retail comprises a smaller share of revenue.

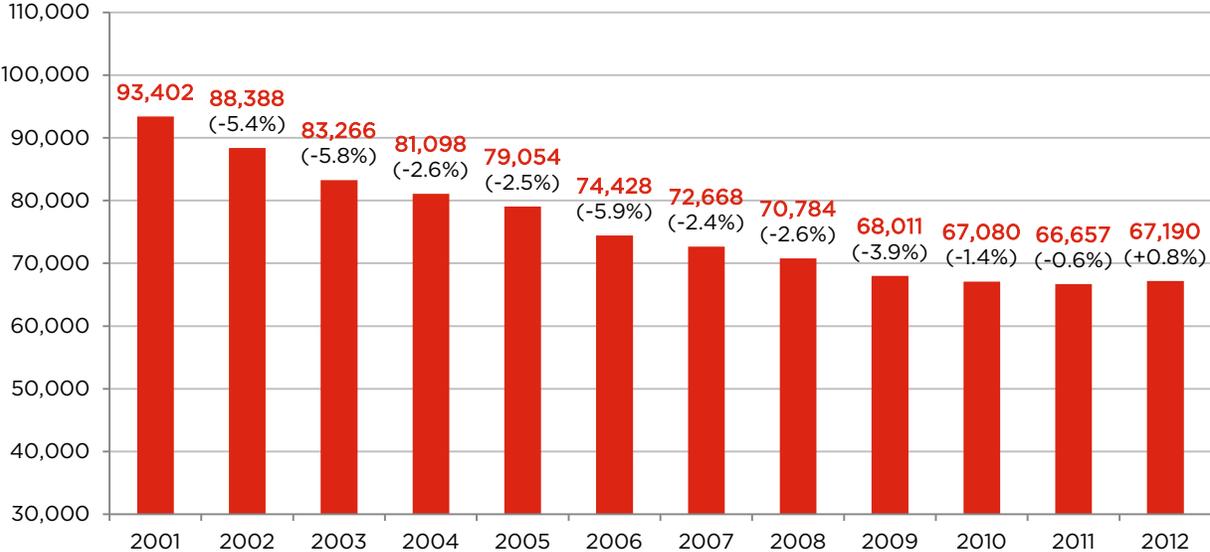
Even with the stabilization of retail employment, e-commerce continues to shift employment away from stores and toward logistics activities such as trucking and warehousing. The logistics industry has developed a pattern of seasonal hiring increasingly similar to retail. More uniform taxation of internet sales can only help in regaining sales tax revenue. In the meantime, e-commerce continues to affect big-box stores and other comparison retail. While the middle hollows out, convenience retail (groceries, gas stations, etc.) and destination retail (e.g. Easton Town Center), if executed well, provide better real estate opportunities.

# RETAIL EMPLOYMENT

## RETAIL EMPLOYMENT STABILIZING

From 2001 to 2009, the annual loss in retail employment in Franklin County ranged from 2.4 to 5.9 percent (Figure 1). After smaller losses in 2010 and 2011, retail employment finally showed an uptick in 2012 with an increase of 533 jobs (+0.8 percent). According to EMSI, county retail employment increased again in 2013, up 1.7 percent to 68,349 employees.

**FIGURE 1: FRANKLIN COUNTY RETAIL EMPLOYMENT, 2001-2012 (% CHANGE FROM PREVIOUS YEAR)**

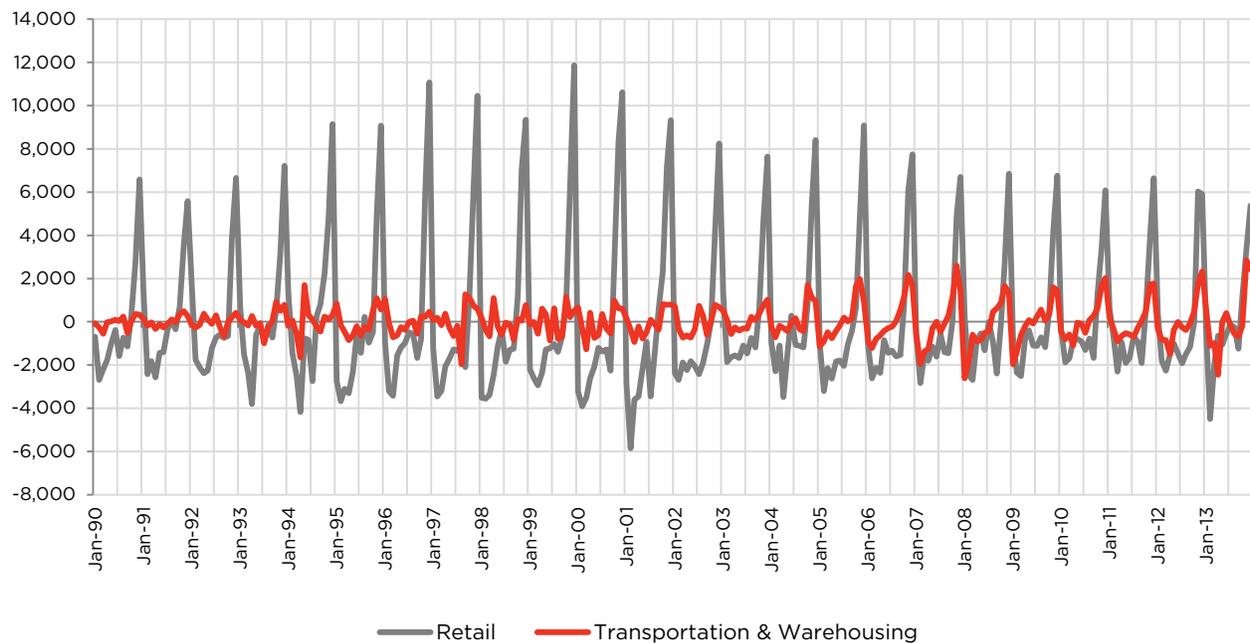


Source: U.S. Bureau of Labor Statistics, Quarterly Census of Employment and Wages

## LOGISTICS, THE NEW RETAIL

Even as retail employment in the county recovers, it is clear that e-commerce will have a long-term impact, shifting jobs from stores to distribution and fulfillment centers. In the early- to mid-2000s, transportation and warehousing employment began to show seasonality similar to retail, with additional hiring leading up to the holidays (Figure 2). As advances in logistics move e-commerce to ever tighter delivery times closer to Christmas Day, the seasonal peak has shifted from October-November to November-December and continues to strengthen each year. In the meantime, seasonal retail employment is not as prominent as it was in the early 2000s.

**FIGURE 2: SEASONAL EFFECT ON RETAIL AND TRANSPORTATION & WAREHOUSING EMPLOYMENT, COLUMBUS MSA, 1990-2013**



Source: U.S. Bureau of Labor Statistics, Quarterly Census of Employment and Wages; Columbus Chamber

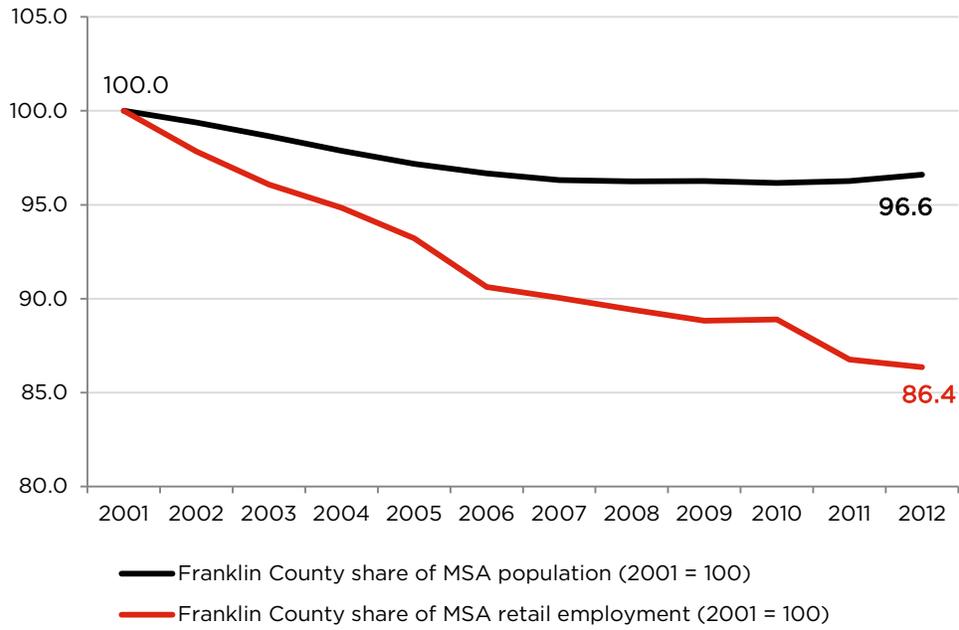
## RETAIL LEAKAGE OUT OF FRANKLIN COUNTY

From 2001 to 2012, Franklin County's population grew by 10 percent. In comparison, the rest of the metro area increased by 22 percent, reflecting a trend of ongoing suburbanization and growth further out from the urban core. During the same period, Franklin County lost more than 26,000 jobs in the retail sector (NAICS 44-45), a decline of 28 percent. The rest of the metro area saw retail employment increase by 6,400 jobs, not enough to counterbalance Franklin County's loss, but a gain of 25 percent among the outer counties.

Figure 3 (next page) displays Franklin County's shares of Columbus metro area population and retail employment indexed to 100 in 2001. From 2001 to 2012, the county's share of retail

employment (red) has declined more steeply than has its share of the population (black). Despite population growth since 2010 outpacing the metro area, Franklin County has seen retail employment continue to decline.

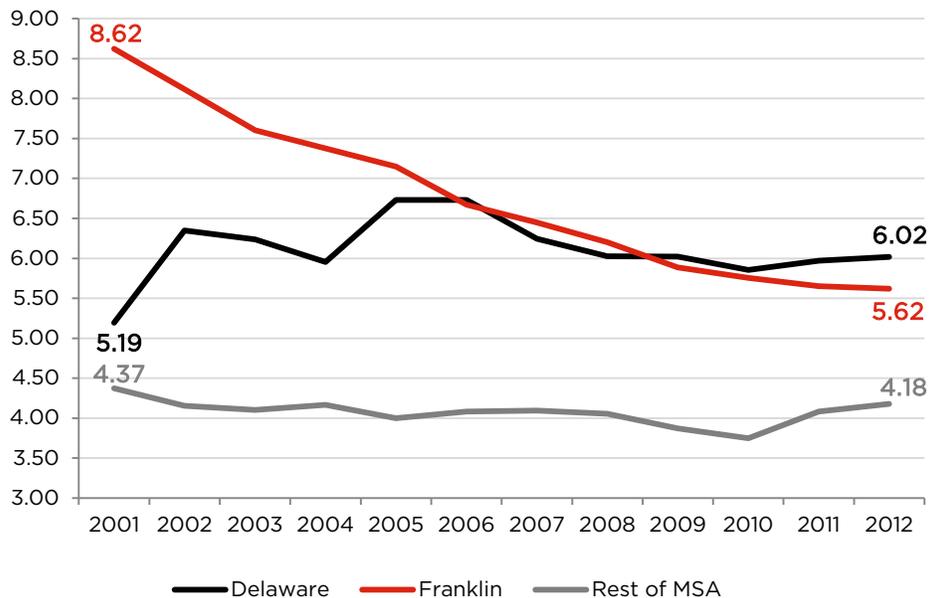
**FIGURE 3: FRANKLIN COUNTY SHARE OF MSA POPULATION & RETAIL EMPLOYMENT**



Sources: U.S. Census Bureau, Annual Population Estimates; U.S. Bureau of Labor Statistics, Quarterly Census of Employment and Wages

On a per capita basis, the number of retail jobs per 100 residents in Franklin County fell from 8.62 in 2001 to 5.62 in 2012 (Figure 4, next page). Delaware County, which includes Polaris, has exceeded Franklin County in this measure since 2009. The gap between Delaware and Franklin counties in 2012, while small at 0.40 jobs per resident, was higher than previous years. The other six counties in the metro area have had a much smaller retail presence than either Franklin or Delaware County, but they have also shown greater recovery since 2010.

**FIGURE 4: NUMBER OF RETAIL JOBS PER 100 RESIDENTS**



Sources: U.S. Census Bureau, Annual Population Estimates; U.S. Bureau of Labor Statistics, Quarterly Census of Employment and Wages

### **RETAIL LEAKAGE IN OTHER CORE URBAN COUNTIES**

Franklin County is not unique in the U.S. in losing retail to outer counties. Among selected metro areas (Figure 5, next page) roughly similar to Columbus in size, Nashville, Indianapolis, Charlotte and Austin also show leakage out of their core counties. Leakage here is defined as the difference in the percentage change in the core county's share of the metro area's population versus the change in its share of retail employment.

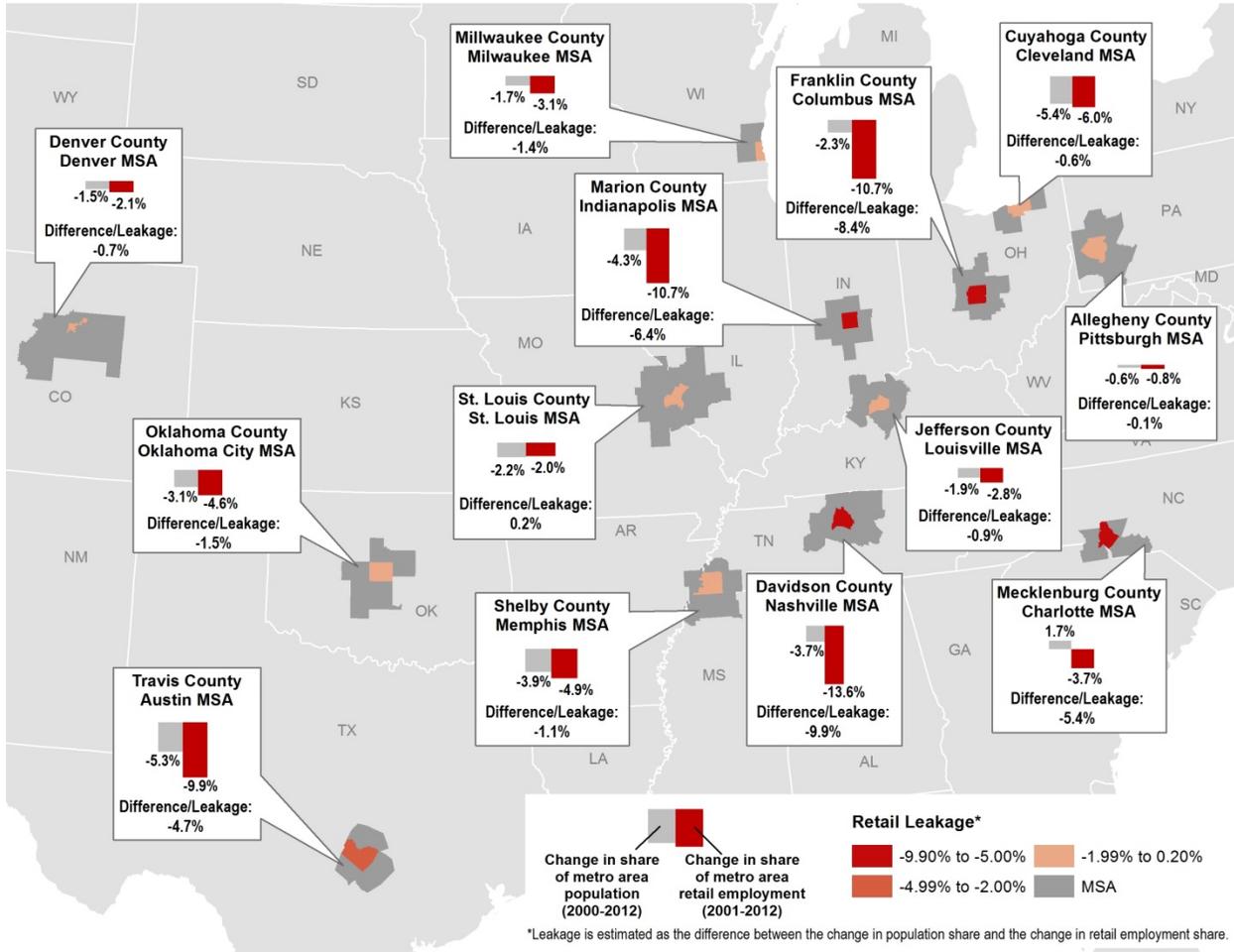
Based on this measure, Franklin County had a loss in retail employment share from 2001 to 2012 that exceeded its loss in population share by 8.4 percentage points. Davidson County, Tennessee (Nashville) had an even larger difference, a leakage of 9.9 percentage points.

Although it is difficult to draw definitive conclusions, retail leakage seems to occur more in fast-growing metro areas that do not have significant natural barriers to development. Columbus, Nashville, Indianapolis, Charlotte and Austin all fit these two rules. Denver is fast-growing but has the Rocky Mountains to the west. Louisville's somewhat slower growth rate, combined with just three bridge crossings across the Ohio River, appears to suppress its leakage. Core counties of slow- or no-growth metro areas such as Cleveland, Pittsburgh and St. Louis do not show as much sign of leakage.

Whether or not there is a local option sales tax does not appear to be a factor. The few among the selected counties that are in states with no local option sales tax (Marion, IN; Jefferson, KY; Allegheny, PA; though Allegheny County itself is permitted a sales tax by the state) are spread across the list. As much as a suburban county that has sales tax revenue

might try to spur retail development, their efforts may be much less impactful than regional economic health and topography.

**FIGURE 5: CORE COUNTY CHANGE IN SHARE OF METRO AREA POPULATION AND RETAIL EMPLOYMENT**



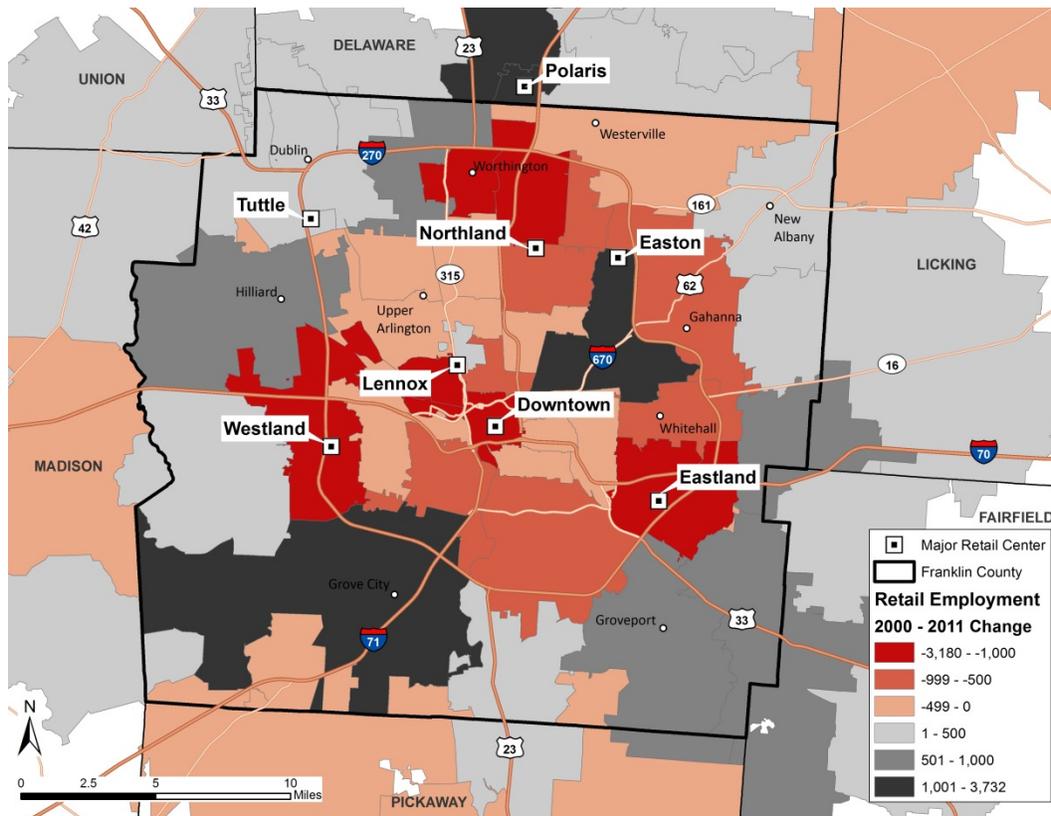
## RE-URBANIZATION OF RETAIL?

From 2000 to 2011, retail employment in Franklin County migrated toward outer areas and new development (Figure 6). Within the county, Easton (ZIP 43219) was the top gainer during this period, followed by Grove City (43123) and Groveport (43125).

Areas that lost the most retail jobs in the county mainly comprised older retail centers and cores (Table 1, next page). The ZIP code 43229, including Northgate and Forest Park, had the greatest retail employment loss. The ZIP codes including Eastland, Westland and Northland ranked third, fifth and ninth respectively in jobs lost. ZIP code 43215 ranked second with a loss of nearly 2,400 retail jobs, primarily due to the decline of City Center in the first half of the decade.

Despite the longer-term trends, a closer look at retail employment trends since 2007 show a turnaround in some more central areas of the county, including Bexley, Clintonville, Hilltop, Upper Arlington and Whitehall (Figure 7). Future editions of this report will continue to monitor whether urban retail employment truly emerges with continued growth in neighborhoods such as Downtown and the Short North and with projects such as Grandview Yard and the Shops at Worthington Place.

**FIGURE 6: CHANGE IN RETAIL EMPLOYMENT, FRANKLIN COUNTY ZIP CODES, 2000-2011**



Source: U.S. Census Bureau, County Business Patterns

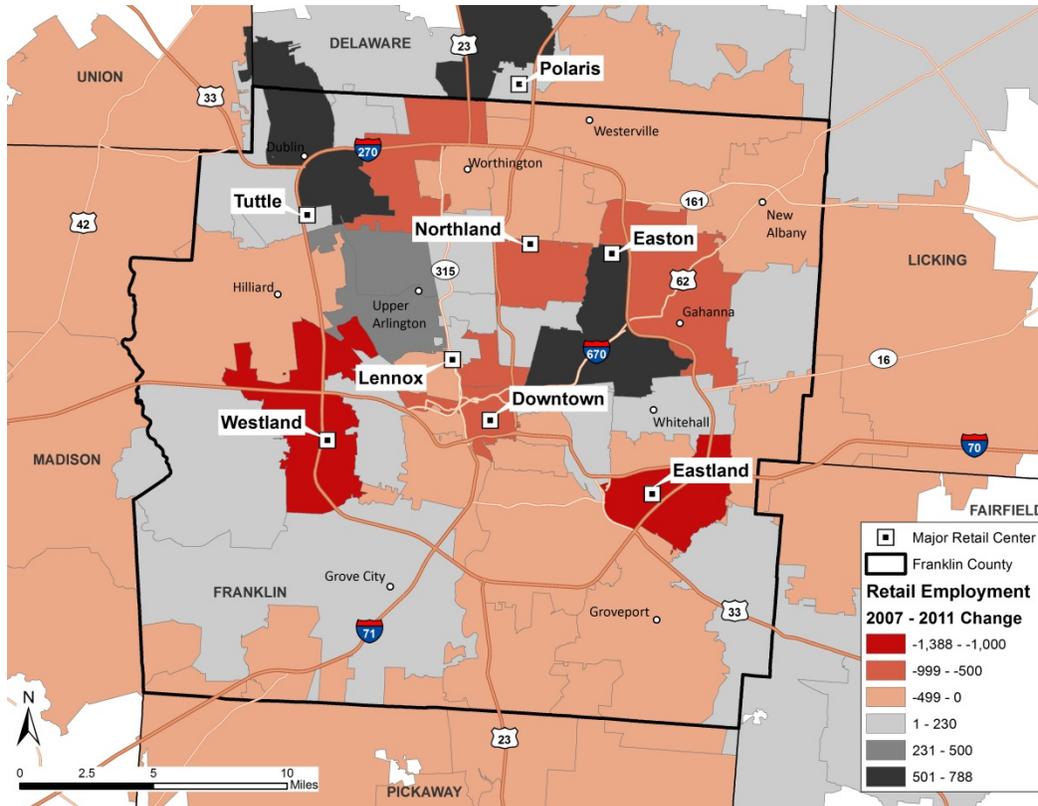
**TABLE 1: CHANGE IN RETAIL EMPLOYMENT, TOP AND BOTTOM 10 FRANKLIN COUNTY ZIP CODES, 2000-2011**

Top 10 ZIP Codes - Retail Employment Gain			
ZIP Code	Area	Change in employment	Change %
43219	Easton	3,513	75.6%
43123	Grove City	1,061	51.8%
43125	Groveport	990	271.2%
43110	Canal Winchester	958	203.8%
43068	Reynoldsburg	734	22.6%
43026	Hilliard	680	31.4%
43235	NW Columbus/ Worthington	593	22.8%
43016	Tuttle Crossing	342	11.7%
43054	New Albany	290	111.1%
43119	Galloway	194	404.2%

Bottom 10 ZIP Codes - Retail Employment Loss			
ZIP Code	Area	Change in employment	Change %
43229	Northgate/Forest Park - 161/Karl Rd	-3,180	-51.8%
43215	Downtown	-2,387	-59.2%
43232	Eastland Area	-2,056	-41.6%
43212	Grandview Heights	-1,923	-60.1%
43228	Westland/Lincoln Village	-1,557	-20.9%
43227	Linwood	-1,539	-71.4%
43085	Worthington	-1,090	-47.0%
43223	South Hilltop - Harrisburg Pike	-942	-52.3%
43231	Minerva Park - 161/3	-828	-48.9%
43201	University District/ Italian Village	-715	-43.8%

Source: U.S. Census Bureau, County Business Patterns

**FIGURE 7: CHANGE IN RETAIL EMPLOYMENT, FRANKLIN COUNTY ZIP CODES, 2007-2011**



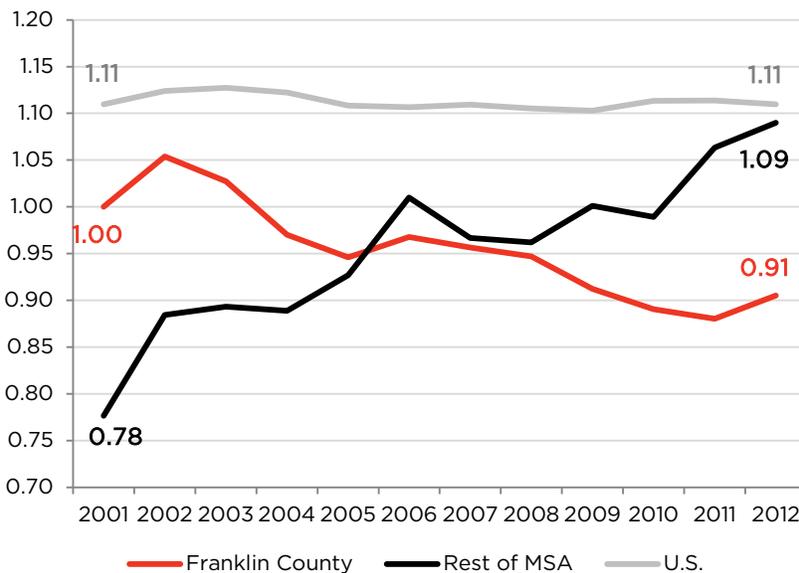
Source: U.S. Census Bureau, County Business Patterns

## RESTAURANTS: FULL SERVICE VERSUS LIMITED SERVICE

In contrast to retail, employment in Franklin County restaurants and bars (NAICS 722 – food services and drinking places) has remained steady over time, up 9.4 percent from 47,527 in 2001 to 51,973 in 2012. The rest of the metro area has seen restaurant and bar employment increase 50.8 percent from 14,332 in 2001 to 21,614 in 2012.

Franklin County continues to lag the U.S. in the ratio of full-service restaurant (sit down, waiter service) employment to limited-service restaurant (fast food, casual) employment. This trend contrasts the rest of the metro area, which has seen more employment growth in full-service restaurants (Figure 8) and is now near parity with the U.S. Previous editions of this report have speculated that Franklin County may be more attractive as a test market and consumer base for fast food and fast casual restaurants, while full-service restaurants in outer counties have a larger role in fulfilling demand for leisure and entertainment.

**FIGURE 8: RATIO OF FULL-SERVICE RESTAURANT EMPLOYMENT TO LIMITED-SERVICE RESTAURANT EMPLOYMENT**

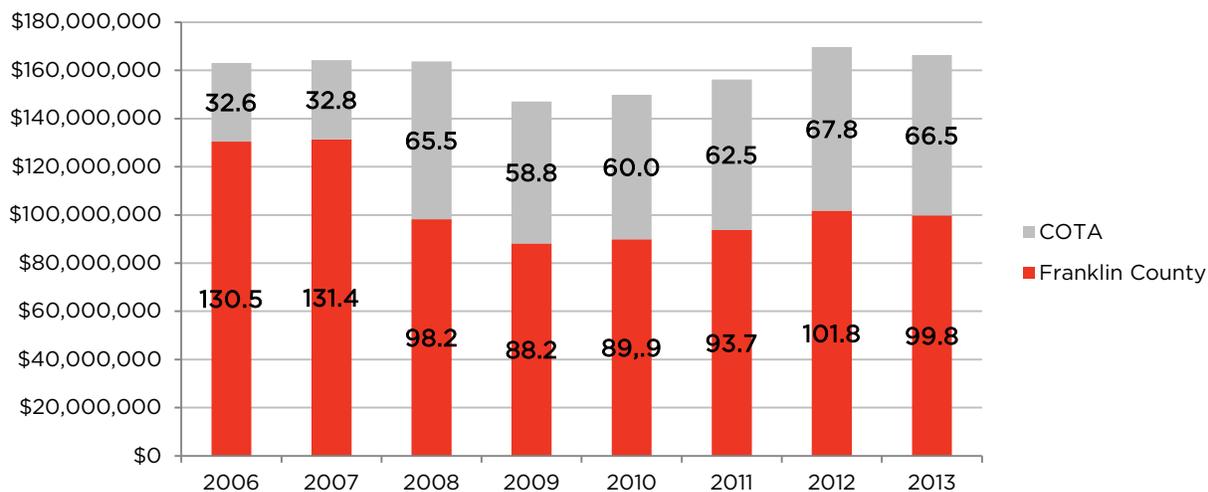


Source: U.S. Bureau of Labor Statistics, Quarterly Census of Employment and Wages

## SALES TAX REVENUES

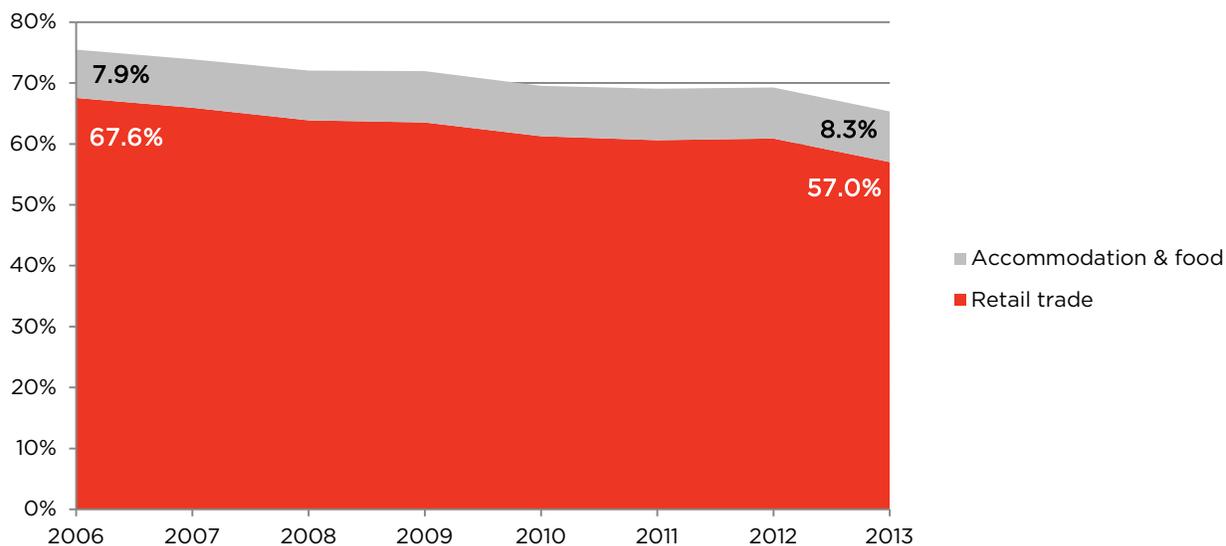
Franklin County's overall sales tax revenue, not including COTA's share, rose 3.9 percent from \$146.9 million in 2012 to \$152.7 million in 2013. However, revenue based on retail trade and accommodation and food declined 1.9 percent from \$101.8 million to \$99.8 million (Figure 9). These contrasting trends represent the resumption of a decline in retail's share of Franklin County's sales tax revenue. While accommodation and food have maintained an 8 percent share since 2006, retail trade has seen its share fall from 67.6 percent in 2006 to 57.0 percent in 2013 (Figure 10).

**FIGURE 9: RETAIL SALES TAX REVENUE (\$ MILLION), FRANKLIN COUNTY, 2006-2013**



Source: Ohio Department of Taxation

**FIGURE 10: RETAIL AND ACCOMMODATION & FOOD SHARE OF FRANKLIN COUNTY SALES TAX REVENUE**



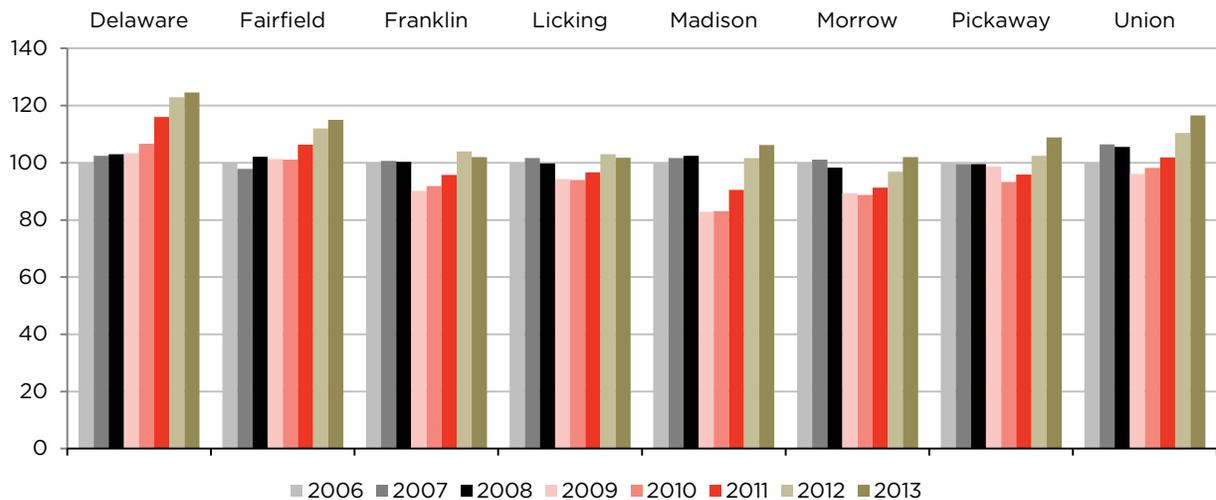
Source: Ohio Department of Taxation

To compare across counties and the various tax rate changes occurring in different years, the data can be standardized by calculating the consumer expenditure base<sup>1</sup> from which the revenues were derived. Figure 11 shows this base of taxable retail sales indexed to 100 in

<sup>1</sup> The taxable sales base is an indicator of overall retail spending but does not include all retail, in particular groceries that are not subject to sales tax. There is a wide range of other exemptions and exceptions to the Ohio sales tax: [http://tax.ohio.gov/faqs/Sales/sales\\_taxability.stm](http://tax.ohio.gov/faqs/Sales/sales_taxability.stm). Noncompliance with paying sales tax is another factor.

2006 across all the counties in the Columbus metro area. After a 10 percent drop from 2008 to 2009 in its tax base, Franklin County recovered to above its 2006-2008 levels by 2012. In terms of growth rate, however, Franklin County lags several of its neighbors such as Delaware, Fairfield and Union counties.

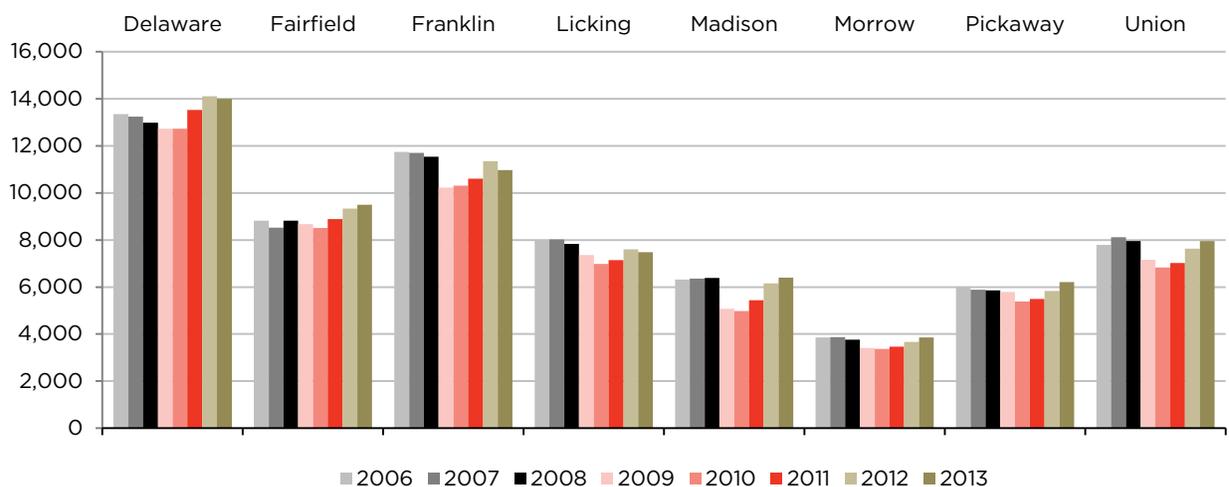
**FIGURE 11: TAXABLE RETAIL SALES, 2006-2013 (INDEXED TO 2006=100)**



Source: Ohio Department of Taxation

In 2013, Franklin County had an average of \$10,974 in taxable retail sales per resident, significantly higher than all other counties in the metro area except for Delaware, which had \$13,992 per resident (Figure 12). Even including Delaware County, the Franklin County average exceeds the rest of the metro area by 17.5 percent. Franklin County's sales per capita is higher for a number of reasons, including the presence of major retail centers, more tourism spending, and a greater daytime working population.

**FIGURE 12: TAXABLE RETAIL SALES (\$) PER CAPITA, 2006-2013**



Source: Ohio Department of Taxation

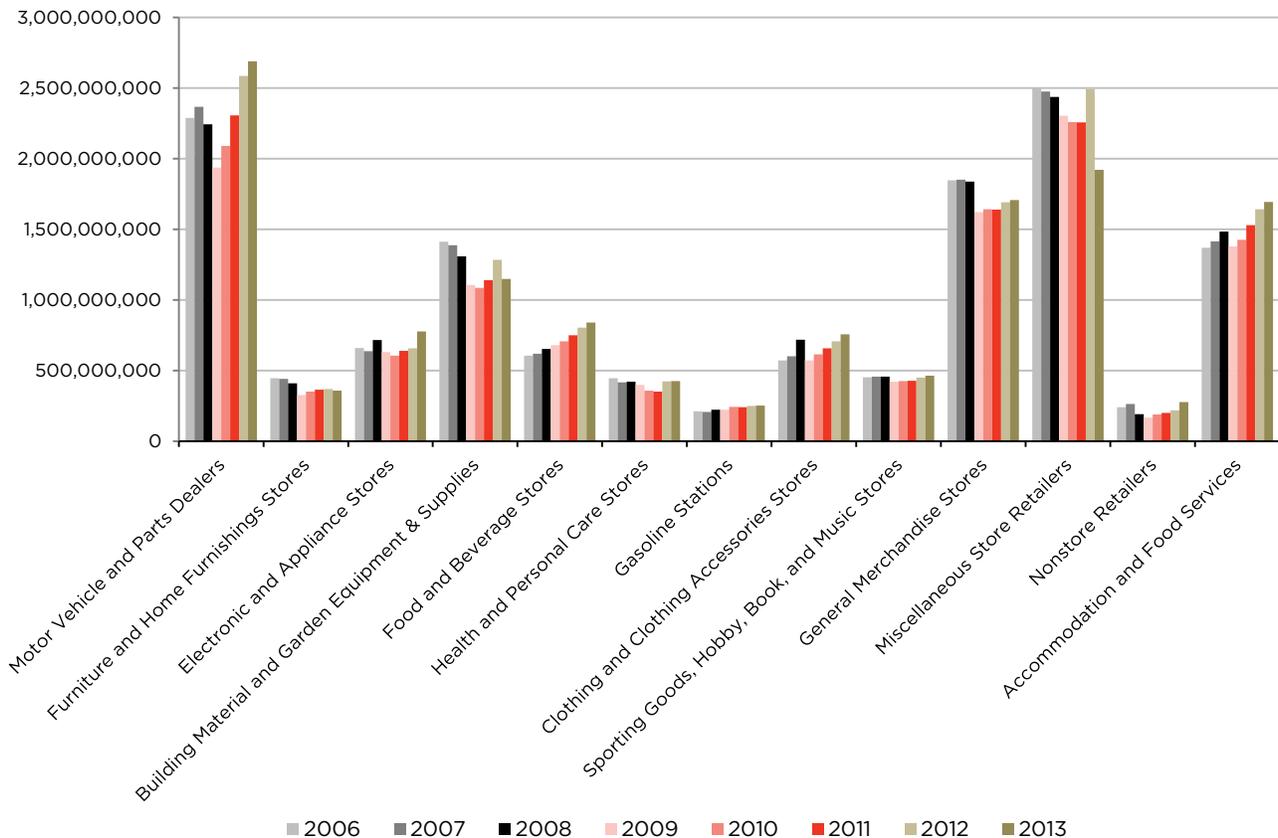
Among the 12 major retail trade categories in Franklin County, the top gainers between 2012 and 2013 were nonstore retail (26.7%) and electronic and appliance stores (18.3%) (Figure 13). The worst performing categories were miscellaneous stores<sup>2</sup> (-22.9%) and building material and garden supplies (-10.6%), a significant reversal of their growth the previous year.

Several categories have now shown growth each year since 2009:

- Motor vehicles and parts: 8.5 percent average annual growth rate since 2009
- Food and beverage stores (grocery): 5.4%
- Gasoline stations: 3.0%
- Clothing stores: 7.2%
- Sporting goods, hobby, music: 2.4%
- General merchandise: 1.3%
- Nonstore retail (online, mail order, direct): 13.5%

Accommodation and food services have also experienced year-on-year growth with a 5.3 percent rate since 2009.

**FIGURE 13: TAXABLE RETAIL SALES (\$) BY CATEGORY, FRANKLIN COUNTY, 2006-2013**



Source: Ohio Department of Taxation

<sup>2</sup> Miscellaneous store retail includes florists, office supplies, stationery, used merchandise and other retail.

# REAL ESTATE

## GROWING STRATIFICATION OF RETAIL REAL ESTATE PRODUCT

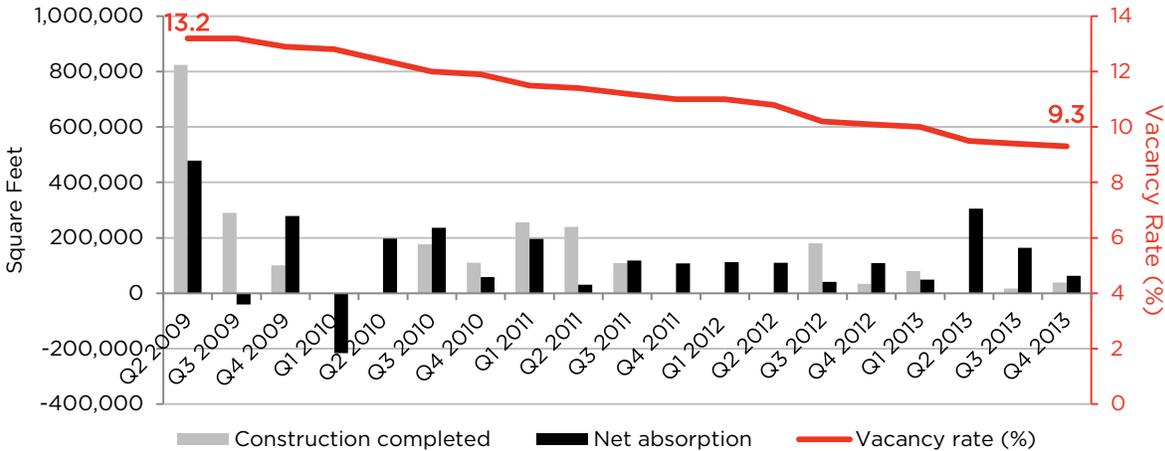
The Urban Land Institute (ULI) surveys real estate leaders and experts around the U.S. for its *Emerging Trends in Real Estate in 2014* report.<sup>3</sup> With regard to the retail sector, the real estate community identified better investment prospects for existing properties in good locations and markets, perhaps enhanced by improvements. They saw weaker prospects for new retail development. Neighborhood/community shopping centers and lifestyle/entertainment retail rated higher than power centers and regional malls for investment or development prospects.

Findings from a report by the local ULI District Council<sup>4</sup>, *Real Estate Trends in Central Ohio 2014*, concur with the national survey results. The local real estate community noted opportunities with grocery-anchored neighborhood centers on one end and destination retail on the other, where shopping is a social experience with restaurants, movie theaters and other uses beyond shops. Overall, retail continues to fluctuate with the threat of e-commerce.

## LOCAL MARKET TRENDS

Since a peak of 13.2 percent in the second quarter of 2009, the retail vacancy rate in the area comprising Franklin County and the adjacent six counties steadily decreased to 9.3 percent in the fourth quarter of 2013 (Figure 14). The lower vacancy rate, however, has not yet affected average asking rents nor completed construction. Since mid-2011, rent rates for both neighborhood and power center retail have hovered in the \$11-12 per square foot range (Figure 15, next page). Retail absorption in 2013 was the highest since 2009 but drew upon existing supply rather than new construction.

**FIGURE 14: RETAIL CONSTRUCTION, ABSORPTION AND VACANCY, COLUMBUS MARKET, Q2 2009-Q4 2013**

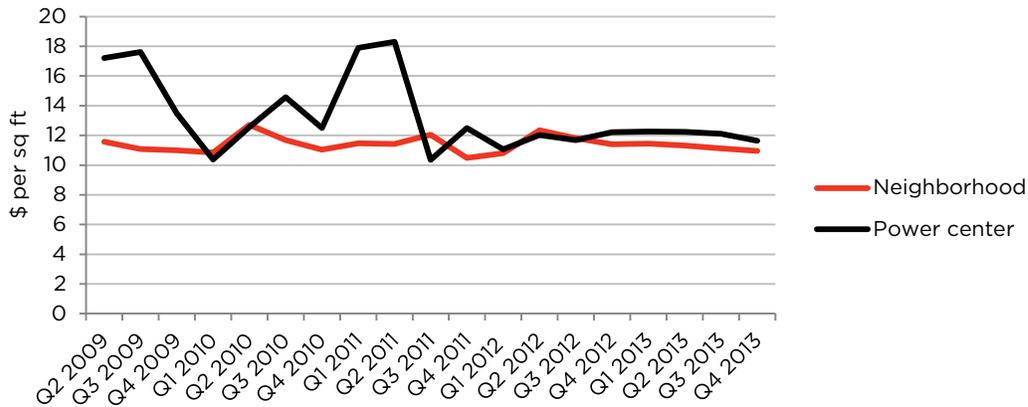


Source: Colliers International

<sup>3</sup> <http://www.uli.org/wp-content/uploads/ULI-Documents/Emerging-Trends-in-Real-Estate-Americas-2014.pdf>

<sup>4</sup> [http://columbus.uli.org/wp-content/uploads/sites/20/2012/11/Real\\_Estate\\_Trends\\_in\\_Central\\_Ohio\\_2014\\_FINAL.pdf](http://columbus.uli.org/wp-content/uploads/sites/20/2012/11/Real_Estate_Trends_in_Central_Ohio_2014_FINAL.pdf)

**FIGURE 15: RETAIL AVERAGE ASKING RENTS COLUMBUS MARKET, Q2 2009-Q4 2013**



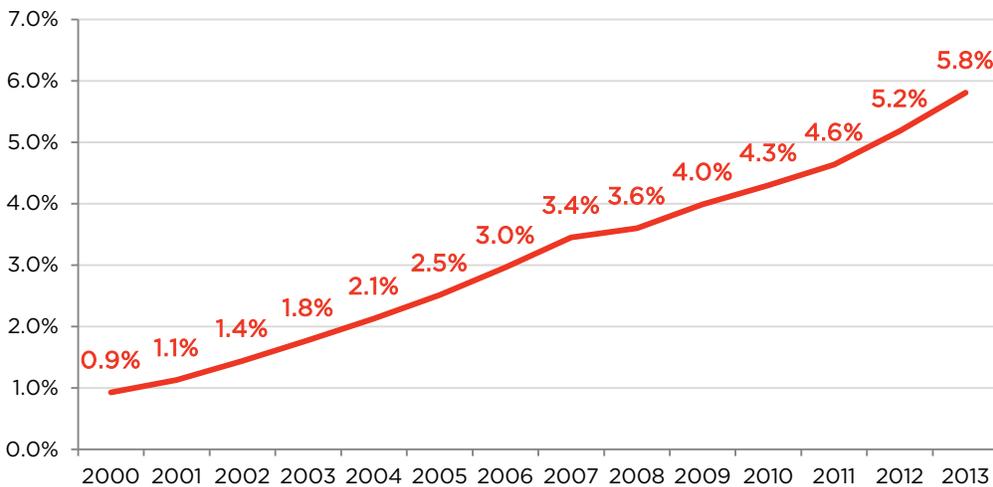
Source: Colliers International

## E-COMMERCE TRENDS AND IMPACTS

### *GROWTH OF E-COMMERCE*

According to the Census Bureau, e-commerce’s share of U.S. retail sales has risen from 0.9 percent in 2000 to 5.8 percent in 2013 (Figure 16).

**FIGURE 16: E-COMMERCE SHARE OF RETAIL SALES, U.S., 2000-2013**



Source: U.S. Census Bureau

From 2000 to 2013, online sales in the U.S. grew 19 percent annually, compared to less than 3 percent for physical bricks-and-mortar retail sales. On an inflation-adjusted basis, growth for

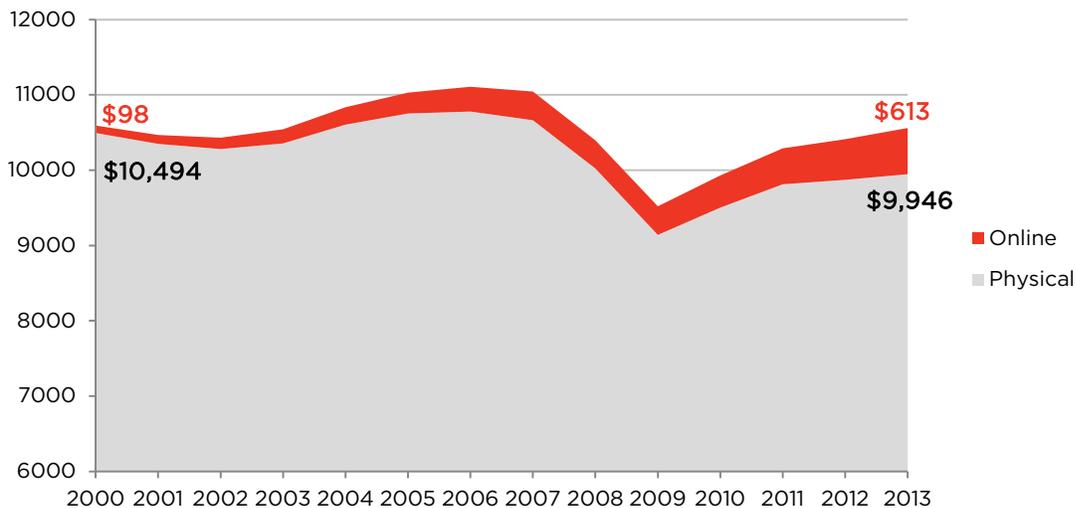
physical retail sales is nearly flat (Table 2). During the same period, the U.S. population grew 12 percent from 282 million in 2000 to 316 million in 2013. On a per capita basis, e-commerce has taken an increasingly greater slice of retail spending. Even though bricks-and-mortar spending has rebounded since 2009, it may be difficult to reach pre-recession levels when e-commerce was a lesser factor (Figure 17).

**TABLE 2: RETAIL SPENDING- BRICKS & MORTAR AND ONLINE, U.S., 2000-2013**

Year	Nominal (\$bn)		Real (inflation-adjusted*) (\$bn)		Real, per capita (\$)	
	Physical	Online	Physical	Online	Physical	Online
2000	2,960.99	27.76	2,960.99	27.76	10,494	98
2001	3,033.13	34.59	2,949.21	33.64	10,349	118
2002	3,089.11	45.21	2,956.89	43.28	10,280	150
2003	3,210.00	58.16	3,004.14	54.43	10,355	188
2004	3,406.26	74.18	3,105.12	67.62	10,605	231
2005	3,603.89	92.80	3,177.62	81.83	10,753	277
2006	3,765.22	114.91	3,216.13	98.15	10,779	329
2007	3,867.65	138.15	3,212.13	114.73	10,663	381
2008	3,810.65	142.28	3,047.77	113.80	10,022	374
2009	3,493.26	145.21	2,803.89	116.56	9,140	380
2010	3,722.13	167.34	2,939.38	132.15	9,503	427
2011	3,993.89	194.25	3,057.48	148.71	9,813	477
2012	4,131.66	225.94	3,098.82	169.46	9,872	540
2013	4,269.53	263.33	3,156.00	194.65	9,946	613
<b>Annualized change</b>	<b>2.86%</b>	<b>18.89%</b>	<b>0.49%</b>	<b>16.16%</b>	<b>-0.41%</b>	<b>15.12%</b>

Source: U.S. Census Bureau  
\*Adjusted to 2000 dollars

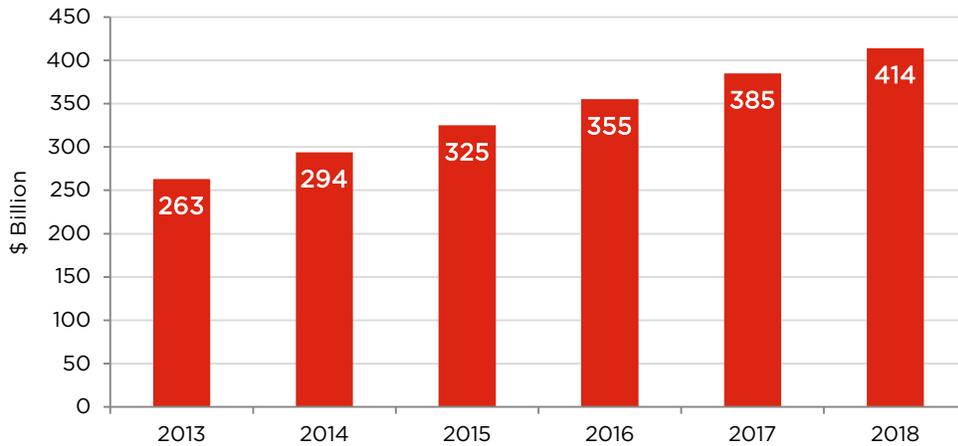
**FIGURE 17: RETAIL SPENDING PER CAPITA- BRICKS & MORTAR AND ONLINE, U.S., 2000-2013**



Source: U.S. Census Bureau  
\*Adjusted to 2000 dollars

Forrester Research forecasts that e-commerce will only continue to grow in the near future, from an estimate of \$263 billion in 2013 to \$414 billion in 2018 (Figure 18), a compound annual growth rate of 9.5 percent.

**FIGURE 18: E-COMMERCE MOBILE AND NON-MOBILE SALES (\$ BILLION), U.S., 2013-2018 PROJECTED**



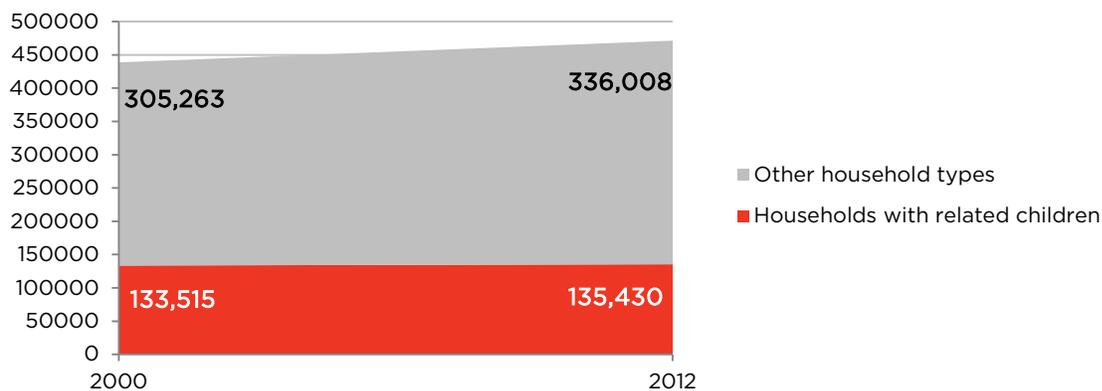
Source: Forrester Research Inc.

## CONSUMER BASE

### *GROWTH OF NON-TRADITIONAL HOUSEHOLDS*

From 2000 to 2012, the number of households in Franklin County with one or more related children increased just 1.4 percent from 133,515 to 135,430 (Figure 19). Nearly all of the net household growth in the county came from those with non-traditional family structures, including single persons, couples without children, etc. Other types of households increased in number by more than 30,000, from 305,263 in 2000 to 336,008 in 2012.

**FIGURE 19: HOUSEHOLDS IN FRANKLIN COUNTY BY TYPE, 2000-2012**



Source: Census Bureau, 2000 Decennial Census and 2012 American Community Survey

## THE FRANKLIN COUNTY CONSUMER: YOUNGER AND MORE AFFLUENT

Consumer data from ESRI further demonstrate the prevalence of nontraditional households in Franklin County. ESRI, a provider of demographics and business data, uses what it calls Tapestry Segmentation to understand the lifestyles and life-stages of consumers.<sup>5</sup> This method uses household/family, income, geography and other characteristics to classify households into 65 different market segments. Certain market segments that include younger professionals and families are far more common in Franklin County than in the U.S. Table 3 highlights these Tapestry segments in red. They represent a combined 34.3 percent of the county's households, compared to a 13.4 percent share nationwide.

**TABLE 3: TOP 10 TAPESTRY SEGMENTS IN FRANKLIN COUNTY**

Rank	Tapestry Segment	Percent of Franklin County households	Percent of U.S. households
1	Aspiring Young Families	8.6	2.3
2	Enterprising Professionals	6.6	1.9
3	Rustbelt Traditions	5.7	2.4
4	Metropolitans	5.0	1.4
5	Milk and Cookies	4.8	2.2
6	Young and Restless	4.7	1.5
7	Inner City Tenants	4.6	1.4
8	Up and Coming Families	4.6	4.1
9	Metro City Edge	3.7	0.9
10	Boomburbs	3.3	2.4

Source: ESRI, 2013

The top 10 Tapestry segments in Franklin County differ significantly from those of the U.S. overall (Figure 20). Franklin County is younger, more urban, and more affluent, at least relative to the life-stage of young families, professionals, and students. These demographics are helping to fuel the retail trends identified elsewhere in this report, including the growth in clothing sales (page 11) and the popularity of fast-casual and fast-food restaurants (page 8). Only two segments are represented in the top 10 lists of both Franklin County and the U.S.: Up and Coming Families and Rustbelt Traditions.

<sup>5</sup> For more information, see: [http://www.esri.com/data/esri\\_data/tapestry.html](http://www.esri.com/data/esri_data/tapestry.html).

FIGURE 20: TOP 10 TAPESTRY SEGMENTS IN FRANKLIN COUNTY VS. U.S.\*

*Franklin County*



*U.S.*



Source: ESRI, 2013

\*The sizes of the words are proportional to the percentage of households that each segment represents in their respective geography.





