

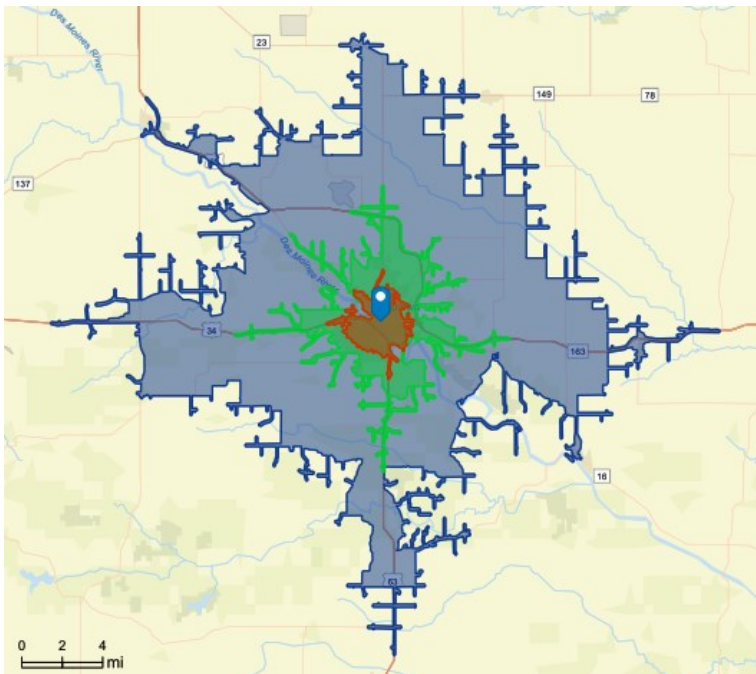
# DOWNTOWN OTTUMWA

OTTUMWA, IOWA



DOWNTOWN OTTUMWA DRIVE TIME MARKET

## DEMOGRAPHIC FAST FACTS Esri 2021



## MARKET SNAPSHOT Esri 2021

Ottumwa, a Main Street Iowa community, is taking a pro-active approach to planning for the future prosperity of the community's traditional downtown business district.

The efforts of the Main Street Ottumwa organization and its partners, along with investments made by the public and private sectors, are working to heighten the appeal of the historic neighborhood commercial district among consumers, investors and entrepreneurs. Moving forward, it will be critical to capitalize upon and leverage these investments and ongoing Main Street Ottumwa marketing efforts to position the downtown district as a local economic engine and center for commerce.

This Market Snapshot, prepared as part of a more comprehensive technical assistance service provided by Main Street Iowa, highlights and summarizes demographic, lifestyle and retail data, characteristics and trends in the marketplace. The information, provides groundwork, benchmarks and a basis for important decision-making processes that will help guide future real estate and business development strategies.



**Ottumwa is a Main Street Iowa community.**

*The mission of the Main Street Iowa Program is to improve the social and economic well-being of Iowa's communities by assisting selected communities to capitalize on the unique identity, assets and character of their historic commercial district.*



POPULATION

**25,565**

TEN MINUTES | 2021  
2021-26 GROWTH: -1.1%

Population	5 Min	10 Min	20 Min
2021 Estimate	14,790	25,565	33,142
Growth (2021-26)	-1.0%	-1.1%	-1.0%

**i** Est. State Pop Growth (2021-26) 2.6%



DAYTIME POP

**28,864**

TEN MINUTES | 2021  
DAYTIME CHANGE: 12.9%

Daytime Population	5 Min	10 Min	20 Min
Total Daytime Pop	19,900	28,864	34,739
Daytime Change	34.6%	12.9%	4.8%



HOUSEHOLDS

**10,429**

TEN MINUTES | 2021  
2021-26 GROWTH: -1.2%

Households	5 Min	10 Min	20 Min
2021 Estimate	6,085	10,429	13,533
Growth (2021-26)	-1.2%	-1.2%	-1.1%

**i** Est. State HH Growth (2021-26) 2.8%



MEDIAN HH INCOME

**\$42,648**

TEN MINUTES | 2021  
2021-26 GROWTH: 5.4%

Median HH Income	5 Min	10 Min	20 Min
2021 Estimate	\$38,748	\$42,648	\$46,449
Growth (2021-26)	4.2%	5.4%	7.4%

**i** 2021 State: \$60,413 | 2021-26 Growth: 8.1%

Source: Esri Market Profile | 08.21

# MARKET TRAITS ESRI 2021



HOUSING UNITS

## 2021 HOUSING UNITS SUMMARY

Housing Units	5 Min	10 Min	20 Min
2021 Estimate	6,883	11,685	15,123
- Owner Occupied	49.9%	57.2%	60.6%
- Renter Occupied	38.5%	32.0%	28.9%
- Vacant	11.6%	10.7%	10.5%
Estimated State Percent Vacant (2021)			9.9%



DIVERSITY

## 2021 DIVERSITY INDEX

Households	5 Min	10 Min	20 Min
<b>2021 Diversity Index</b>	<b>50.9</b>	<b>44.5</b>	<b>39.2</b>

The Diversity Index summarizes racial and ethnic diversity. The index shows the likelihood that two persons, chosen at random from the same area, belong to different race or ethnic groups. The index ranges from 0 (no diversity) to 100 (complete diversity).



EDUCATIONAL ATTAINMENT

## 2021 POP 25+ BY EDUCATIONAL ATTAINMENT

Education	5 Min	10 Min	20 Min
No HS Diploma	15.6%	13.1%	11.2%
HS Grad/GED	33.2%	33.4%	34.5%
Some College/Assoc	37.0%	34.8%	34.5%
Bachelor/Grad/Prof	14.2%	18.6%	19.8%



**\$20,794**

PER CAPITA INCOME  
5 MINUTES | 2021



**37.0**

MEDIAN AGE  
5 MINUTES | 2021



**94.4%**

2021 EMPLOYED  
5 MINUTES CIVILIAN POP 16+

10 Minutes	\$23,505
20 Minutes	\$25,480
State	\$32,417

10 Minutes	39.2
20 Minutes	41.0
State	39.4

10 Minutes	94.5%
20 Minutes	94.6%
State	95.7%



## 2021 EMPLOYMENT BY OCCUPATION

2021 Employed 16+	5 Min	10 Min	20 Min
Total Estimate	6,952	11,977	15,618
- White Collar	39.1%	42.7%	45.3%
- Services	17.1%	16.6%	15.3%
- Blue Collar	43.9%	40.7%	39.4%

# LIFESTYLE PROFILE ESRI 2021

Esri's Community Tapestry is a geodemographic segmentation system that integrates consumer traits with residential characteristics to identify markets and classify U.S. neighborhoods. Tapestry Segmentation combines the "who" of lifestyle demography with the "where" of local geography to create a classification with 67 distinct behavioral market segments (Tapestry Segments), each belonging to one of fourteen LifeMode Groups.

## Top Drive Time Area Esri Tapestry LifeMode Groups

Tapestry LifeMode groups represent markets that share a common experience—born in the same generation or immigration from another country—or a significant demographic trait, like affluence. The Hometown and GenXurban LifeMode Groups are among those most prevalent in the Downtown Ottumwa drive time market.



## Hometown (LM12) | #1 in 5 and 10 Minutes

5 Minutes		10 Minutes		20 Minutes	
HHs	Percent	HHs	Percent	HHs	Percent
2,683	44.1%	3,327	31.9%	3,327	24.6%

- ▶ Growing up and staying close to home; single householders
- ▶ Close knit urban communities of young singles (many with children)
- ▶ Owners of old, single-family houses, or renters in small multi-unit buildings
- ▶ Religion is the cornerstone of many of these communities
- ▶ Visit discount stores and clip coupons, frequently play the lottery at convenience stores
- ▶ Canned, packaged and frozen foods help to make ends meet
- ▶ Purchase used vehicles to get them to and from nearby jobs



## Cozy Country Living (LM6) | #1 in 20 Min

5 Minutes		10 Minutes		20 Minutes	
HHs	Percent	HHs	Percent	HHs	Percent
618	10.2%	1,617	15.5%	3,900	28.8%

- ▶ Empty nesters in bucolic settings
- ▶ Largest Tapestry group, almost half of households located in the Midwest
- ▶ Homeowners with pets, residing in single-family dwellings in rural areas; almost 30% have 3 or more vehicles and, therefore, auto loans
- ▶ Politically conservative and believe in the importance of buying American
- ▶ Own domestic trucks, motorcycles, and ATVs/UTVs
- ▶ Prefer to eat at home, shop at discount retail stores (especially Walmart), bank in person, and spend little time online
- ▶ Own every tool and piece of equipment imaginable to maintain their homes, vehicles, vegetable gardens, and lawns
- ▶ Listen to country music, watch auto racing on TV, and play the lottery; enjoy outdoor activities, such as fishing, hunting, camping, boating, and even bird watching

Information on Esri Tapestry methodology and applications, along with descriptions for Tapestry's 67 segments, are available from the Esri website at: <http://doc.arcgis.com/en/esri-demographics/data/tapestry-segmentation.htm>

# RETAIL VIEW

ESRI 2017 RETAIL MARKETPLACE DATA

Esri's Retail MarketPlace data provides a direct comparison between retail sales and consumer spending by industry. To capture a snapshot of an area's retail market place, a sales surplus or leakage, expressed in current dollars, is calculated to summarize the relationship between supply (retail sales by businesses) and demand (consumer spending by household). Deviations from potential sales, or demand, may reveal areas of opportunity in the trade area's retail sectors, keeping in mind any extenuating circumstances that may be driving the results.

## DOWNTOWN OTTUMWA DRIVE TIME MARKET SALES SURPLUS AND LEAKAGE ESTIMATES | (\$MM)

Total Retail Trade (NAICS 44 – 45)	5 Minutes	10 Minutes	20 Minutes
- Est. Sales (Supply)	\$274.3	\$370.9	\$404.1
- Potential Sales (Demand)	\$128.6	\$250.9	\$350.9
- Est. Surplus/(Leakage)	\$145.7	\$120.0	\$53.2
Total Food and Drink (NAICS 722)	5 Minutes	10 Minutes	20 Minutes
- Est. Sales (Supply)	\$30.9	\$38.1	\$39.5
- Potential Sales (Demand)	\$12.2	\$23.7	\$32.5
- Est. Surplus/(Leakage)	\$18.8	\$14.4	\$7.0
Total Retail, Food and Drink (NAICS 44 – 45, 722)	5 Minutes	10 Minutes	20 Minutes
- Est. Sales (Supply)	\$305.2	\$409.0	\$443.6
- Potential Sales (Demand)	\$140.8	\$274.6	\$383.4
- Est. Surplus/(Leakage)	\$164.5	\$134.4	\$60.2

Estimates rounded to nearest one hundred thousand dollars.

Esri estimates of actual sales reflect current dollars derived from receipts of businesses primarily engaged in selling merchandise. Potential sales is estimated by using Esri's consumer spending data, which provides estimated expenditures for more than 700 products and services that are consumed by U.S. households. The estimate of an area's demand is based upon estimated expenditures by households within the defined geography.

Source: Esri and Data Axle. Esri 2021 Updated Demographics. Esri 2017 Retail MarketPlace.

Date Note 1: The Esri Retail MarketPlace database is in mature status. While the data are presented in current year geography, all supply- and demand-related estimates remain vintage 2017.

Data Note 2: The polarity of surplus/leakage estimates shown in this document (as compared to those shown in source Esri reports) have been reversed to show surplus as a positive value, and to show leakage as a negative value. The Retail Gap (Sales Surplus/Leakage) represents the difference between Retail Potential and Retail Sales. A positive value represents a surplus in retail sales, often indicating a market where customers are drawn in from outside the defined trade area.

Esri uses the North American Industry Classification System (NAICS) to classify businesses by their primary type of economic activity. Retail establishments are classified into 27 industry groups in the Retail Trade sector, as well as three industry groups within the Food Services & Drinking Places subsector. For more information on Retail MarketPlace data and to download the methodology statement visit:

<http://doc.arcgis.com/en/esri-demographics/data/retail-marketplace.htm>

# TOTAL SALES

[Retail Trade (NAICS 44—45) + Food & Drink (NAICS 722) | Esri 2017 Retail Data

\$305 Million	\$409 Million	\$444 Million
5 Minutes	10 Minutes	20 Minutes

## PERFORMANCE BY CATEGORY

Sales gap factors provide a quick-look means of assessing the relative strength of retail categories for a defined geography. The factor is a measure of the relationship between supply and demand that ranges from +100 (total surplus) to -100 (total leakage). A positive value represents a surplus of retail sales and can be indicative of a market where customers are drawn from outside the defined area. Categories showing the highest surplus factors might signal opportunities for expansion or the introduction of complementary products and services to build on market strengths or niches. Likewise, categories with negative factors might offer an indication of gaps in the business mix and potential for re-positioning, expansion or recruitment.

## SALES GAP FACTORS | DOWNTOWN OTTUMWA DRIVE TIME MARKET

Category—Factor	5 Minutes	10 Minutes	20 Minutes
Motor Vehicle and Parts Dealers	(0.2)	(15.2)	(24.7)
Furniture and Home Furnishings Stores	(21.5)	(8.9)	(9.2)
Electronics and Appliance Stores	9.8	(12.2)	(24.7)
Building Materials, Garden & Supply	54.2	34.6	19.8
Food and Beverage Stores	37.6	29.8	16.4
Health and Personal Care Stores	57.2	38.0	23.2
Gasoline Stations	40.0	24.2	23.0
Clothing and Clothing Accessories	29.0	6.8	(8.3)
Sporting Goods, Hobby, Book, Music	14.9	(9.2)	(19.2)
General Merchandise Stores	54.1	35.0	20.5
Miscellaneous Store Retailers	26.2	3.7	(12.7)
Nonstore Retailers	(70.2)	(44.5)	(51.4)
Food Services and Drinking Places	43.6	23.3	9.7

Source: Esri and Data Axle. Esri 2021 Updated Demographics. Esri 2017 Retail MarketPlace.

### Limitations and Disclaimers

Retail market analyses, their components (such as retail sales gap analyses) and derivative business development plans provide important guidance on how a commercial area should, theoretically, be able to perform and on the sales levels businesses should be able to achieve. However, many factors affect the actual performance of businesses and commercial areas, including the skills of the business operator, level of business capitalization, the quality of the physical environment, changes in overall economic conditions, the effectiveness of business and district marketing programs, and other variables. The information in this document is intended to provide a foundation of information for making business development decisions, but it does not and cannot ensure business success.

As is true of all demographic, economic and market studies, our analysis' reliability is limited to the reliability and quality of the data available. Our research assumes that all data made available by and procured from federal, state, city, primary and third party sources is accurate and reliable.

Because market conditions change rapidly and sometimes without warning, the information and opinions expressed here represent a snapshot in time and cannot predict or gauge future changes or results.

Ottumwa, Iowa  
River Hills Dental  
Drive Time: 5, 10, 20 minute radii

Iowa Downtown Resource Center  
Latitude: 41.01700  
Longitude: -92.41200

