

Redevelopment Vision and Strategy for the Former Springs Mill in Lancaster, SC



Table of Contents

Executive Summary	2
The Creative Give Back.....	3
Springs Mill Redevelopment Vision and Strategy	4
Appendix A: Economic Impact Scenarios of Potential New Business Activities.....	14
Appendix B: Community Survey Results	21
Appendix C: Market Profiles for Lancaster and 1, 3, and 5-mile Radii of the Site.....	26
Appendix D: Retail Leakage Analysis of 1, 3, and 5-Mile Radii of the Site	41
Study Partners	45

Executive Summary

The City of Lancaster and the Red Rose City Development Corporation have a vision to redevelop the former Springs Mill site into a catalyst for redevelopment of the Brooklyn neighborhood and all of Lancaster. The 25-acre former mill site was once a hub of economic activity employing hundreds of people. Today, it is the center of blight for a former mill village now turned high-crime and impoverished neighborhood.

The Red Rose City Development Corporation was awarded the 2020 Creative Give Back to create a redevelopment vision to transform the former mill site into a catalyst for redevelopment. The Creative Give Back is an award of up to \$25,000 of consulting services provided by Creative Economic Development Consulting. The study process included site review, economic analysis, community engagement, best practices, and creating a redevelopment strategy.

Throughout the process citizens provided input on the types of activities they would like to see on the site. They want jobs, opportunities for youth, and activities that uplift the neighborhood. Due to contamination on the site, it is likely that the majority of the site will be used for businesses purposes.

Redevelopment Vision Statement: The former Springs Mill site is a catalyst for redevelopment of the Brooklyn Neighborhood and all of Lancaster.

Redevelopment Strategic Priorities:

- Uplift the surrounding neighborhood through job creation and economic activity
- Reactivate the industrial site to remove blight
- Contribute to the long-term, sustainable development of Lancaster and the surrounding area

The consultants recommend pursuing a mix of activities on the site. The highest and best use of the site is a mixed-use development with the anchor tenant(s) being government services and/or small, light manufacturing. In addition to the anchor business activity, there could be a restaurant, retail store, and other development. It is also recommended to explore a nonprofit, cultural arts use of the former mill office building. This could be a museum or youth arts program facility. The next steps to advance the project include community communications, commitment from partners, securing the property, brownfields agreement, and seeking funding for redevelopment.

The City of Lancaster and Red Rose City Development Corporation will take the lead on the project but will need significant assistance from a wide range of community organizations. A project this transformational will need many champions.

The Creative Give Back

The Red Rose City Development Corporation was selected as the 2020 Creative Give Back winner. The Creative Give Back is Creative Economic Development Consulting's way to give back to the field of economic development. Starting in 2014, Creative EDC began giving away one consulting project a year through a competitive application process. Previous winners have included Waynesboro, VA, Cabarrus County EDC, NC, Wayne County Development Alliance, NC, City of Graham, NC, and the Blacksburg Partnership, VA.



To be considered for The Creative Give Back, the project must:

- BE CREATIVE
- Challenge us to think outside the box
- Have the ability to significantly impact the local economy
- Have a true, demonstrated consulting need
- Be consistent with sustainable economic development practices
- Give us the opportunity to work with a great community and great people

The Red Rose City Development Corporation project aims to spark redevelopment interest in the former Springs Mill site. Once an economic driver employing hundreds of people and supporting a thriving residential area, the site now contributes to the blight of the neighborhood. By engaging the community in a strategic planning process, this project hopes to create a vision for how the property can be redeveloped and catalyze revitalization in Lancaster.

Creative EDC's scope of work for the project included:

- GIS desktop review of the site
- Economic analysis of Lancaster and the area to identify business development opportunities
- Input from key development partners and stakeholders into redevelopment vision for the project
- Community input sessions with citizens to gain input on their vision for redevelopment
- Property re-use assumptions and model the potential economic impact
- Best practices in similar revitalization projects
- Redevelopment strategy for the property

The report resulting from this project will be shared with other communities, hopefully sparking ideas for redevelopment.

Springs Mill Redevelopment Vision & Strategy

The former Springs Mill site is approximately 25 acres located just outside the city limits of downtown Lancaster. The property once housed a thriving mill that employed hundreds of people throughout the region. The property has heavy infrastructure (electric, rail, water, wastewater) due to its former heavy industrial use. The mill was demolished around 2004 and the site has remained vacant for almost two decades. Due to its location near downtown, the site offers promising redevelopment opportunities.

City of Lancaster

The City of Lancaster's 2019 population is estimated at 9,119 (U.S. Census). The city has been growing at an annual rate of approximately 0.5%. The median household income is \$30,122 and per capita income is \$23,744. The city has been getting older, with the median age increasing from 36.8 years old in 2010 to 39.1 in 2019. The city is predominantly Black (51%) and White (46%), and has been growing in diversity (diversity index 63.5). The city has a high percentage of people who have not completed high school (24.8%). Most people work in the services sector (49.9%) with manufacturing being the second largest employment sector (18.9%).

Lancaster is an employment, education, and commerce hub for most of Lancaster County. People come to the city to work, shop, dine, recreate, enjoy cultural arts, and attend school. It is also the county seat, attracting people for a wide range of government services.

Springs Mill Surrounding Neighborhood

The neighborhood surrounding the former Springs Mill is blighted and suffers from low-income levels, crime, and dilapidated housing and buildings. Median household (\$23,404) and per capita (\$15,356) incomes are about one-third less than the city as a whole. Almost one-third of the population in this one-mile radius does not have a high school education. There is 6% more rental housing in the neighborhood than in the city. Anecdotally, residents discussed the decline from a thriving mill village to a neighborhood of despair.

The former mill site now contributes to the blight of the neighborhood. Residents believe redeveloping the mill site will help transform the economic and social dynamics of the neighborhood.

One hurdle in overcoming the blight is that the property is in the county, outside Lancaster city limits. The county has less emphasis/resources for code enforcement, revitalization, and redevelopment. One key to revitalizing the area will be city-county cooperation in the redevelopment and/or annexing the property into the city.

Site Assessment

The former Springs Mill site is comprised of approximately 25 acres that lie generally between two rail lines, Bear Creek, S York Street, and 15th Street. Most of the former mill structures have been demolished, leaving the property with some demolition rubble. There are two

The property is currently owned by a demolition company, purchased for reclamation purposes. Ownership is expected to be transferred to the Red Rose City Development Corporation; a nonprofit development corporation associated with the City of Lancaster. It is currently not inside the Lancaster city limits but is expected to be so once ownership is transferred.



Parcel Identification Number	Acres	Taxable Value	Assessed Value
0081H-0A-008.00	245 front feet	\$8,600	\$516
0081H-0B-001.00	285 front feet	\$10,000	\$600
0082E-0C-010.00	7.01	\$37,990	\$2,279
0082D-0Q-001.00	1.97	\$14,800	\$888
0082E-0A-002.01	16.465	\$46,500	\$2,790
	25.445	\$117,890	\$7,073

Surrounding Land Use: Residential

Streams: Bear Creek on the western edge of parcel 0082E-0A-002.01

Owner: KMAC Soil and Environmental Services
2631 Shuttlesworth Drive, Birmingham, AL 35234

Opportunity Zone: Yes

Redevelopment Vision and Strategic Priorities

Vision Statement

The former Springs Mill site is a catalyst for redevelopment of the Brooklyn Neighborhood and all of Lancaster.

Strategic Priorities

- Uplift the surrounding neighborhood through job creation and economic activity
- Reactivate the industrial site to remove blight
- Contribute to the long-term, sustainable development of Lancaster and the surrounding area

Development Opportunities

There are a wide range of development opportunities for the former Springs Mill site. Whereas other mill redevelopment projects start with the mill structure still in place, the Springs Mill was demolished, leaving only a couple of small structures in place. Thus, the path to redevelopment could take many shapes as funding and partners come together. The recommendations in this study are meant to offer one path for the City and Red Rose City Development Corporation.

We believe the highest and best use of the site is a mixed-use development with the anchor tenant(s) being government services and/or small, light manufacturing. If there are parts of the site found to have no contamination, there could be some residential use within the mix of uses. The anchor activities could support additional business activity such as a restaurant and retail store.

Envision a few buildings that are a mix of office space for government services and light industrial space for manufacturing. Beyond anchor employment activities, the buildings can house a restaurant and retail store that serve the development and neighborhood.

Government Operations

Expanded government operations, building upon the law enforcement training center, is the best development opportunity for the former Springs Mill site. The current law enforcement center houses EMS, public works, IT, and training space. Given the site's environmental challenges and location in a distressed area, it is an ideal candidate for grant and publicly funded projects such as government training and services. A few examples of government activities that could be located on the site:

- The current law enforcement training center could be expanded to include more training space to attract larger training events. A larger space could attract statewide training events for South and North Carolina.
- Firefighter training could be expanded to serve larger, regional organizations.
- Another public safety training activity could be paramedics and other first responder training.
- A satellite police office/station/dispatch/call center would provide added security to the neighborhood and increase the number of people working at the site.
- Back-office government services such as finance/processing, call center, and records management, in addition to IT, could be housed in an officed complex on the site. These services could be in partnership with adjacent local governments to form regional back-office services. Residents were clear that quality jobs is one desired outcome of the redevelopment. Housing government back-office operations would provide stable, well-paying jobs.
- Explore state government services center. Some back-office services such as payment processing do not need to be in the state capital.

In the economic impact analysis, government services have the highest economic multiplier. Expanded government services operations would bring workers to the area each day to support other economic activity such as a limited-service restaurant (see below) and retail. It would also signify Lancaster's commitment to revitalizing the now blighted neighborhood.

There is and will continue to be additional federal funding for economic recovery and resiliency. The recent CARES act is one example of federal funding targeted to support communities. It is anticipated that there will be future funding to support local public services for post-pandemic recovery, especially public safety.

Light Manufacturing

The site has heavy infrastructure that would support another heavy industrial user; however, the neighborhood has developed around the site such that a heavy industrial use would not be consistent with current land use. The site is surrounded by residential neighborhoods making it not ideal for heavy industry. Also, the community survey showed no support for large-scale industrial development. However, the site could support light manufacturing/assembly uses. A small manufacturer, or multiple small manufacturers, could take advantage of the infrastructure and not disturb the neighborhood with heavy truck traffic.

One hurdle for this type of development is that it would be difficult for individual small manufacturers to take on the potential cost/liability of redevelopment. A large developer, or public development, could take the lead and lease space to small companies. For example, a developer, public or private, could develop a 50,000 SF building and lease in 10,000 SF increments. This type of flex space development would provide little infrastructure and neighborhood impact for the level of jobs and investment that is possible on the site.

There could be public/grant funding for this type of development targeted at support of small businesses. U.S. Economic Development Administration has additional pandemic-related funding for recovery and resiliency that could be used to fund a feasibility study. RR CDC could be the developer, leasing space to small companies.

Retail – Grocery

With more people working at government services and manufacturing operations, there is opportunity to develop a small retail store that could include grocery staples. A small retailer would not only serve people working on the site but also residents of the neighborhood.

A retail establishment could be part of a mixed-use development housed within, or attached to, a government services office building or multi-tenant manufacturing facility.

Restaurant – Limited-Service Dining

There is currently no restaurant in the immediate area to serve people that come to the law enforcement training center. An onsite limited-service dining establishment could be housed, as suggested with the retail store above, within or attached to a government services and manufacturing complex.

The restaurant could provide catering for training/corporate events, meal delivery for workers in facilities, and support a food truck to participate in festivals and events in Lancaster.

Historic Office Building

The former Springs Mill office building sits on the northwest portion of the site. It could be developed for nonprofit use (museum, art gallery, cultural arts center) and not impede development of the rest of the site. It could serve as a history museum preserving the history of the textile industry in the region. It could become a center for arts programs for disadvantaged youth. There is significant interest from the community to include youth development programs in the redevelopment strategy. There are many possibilities due to the building's unique architectural features, which make it appealing for some cultural resources use.

Given the site's environmental challenges and location in a distressed area, this building could be a good candidate for a grant-funded project. USC Lancaster, Lancaster County Society for Historical Preservation, and/or Lancaster County Council of the Arts could be partners to expand already rich cultural arts and history programs.

Summary of Economic Impact of Potential New Business Activities

As the vision to redevelop the former Springs Mill site takes shape, one of the most often cited objectives is for the property to become a catalyst to revitalize the neighborhood. To demonstrate potential future impacts that businesses could have on the city and the neighborhood, four potential business activities were analyzed and modeled as if they existed on the former Springs Mill site. These are “what-if” scenarios – what would happen if this business activity located on the site? The analysis offers an estimate of the economic benefits of redeveloping the site. This information can be used in grant applications and funding requests.

We modeled expanded government operations with approximately 20 employees. The current training center could be expanded to include government back-office services, additional public safety training, maintenance, and other activities (see Appendix A). The model predicts that new government operations would generate an additional 6 jobs (26 total) in the local economy and stimulate \$4.4M in value-added in the local economy. Government services has the highest jobs multiplier in the analysis.

Citizens want to see economic activity return to the site. They want quality jobs in the neighborhood. The Springs Mill site is a former heavy industrial site; thus, we modeled what would happen if one or more small, light manufacturers employing 20 people operated on the site. (See Appendix A). The model predicts that a manufacturer would generate an additional 4 jobs (24 total) in the local economy and stimulate \$4.5M in value-added income. The economic term “value-added” refers to the economic activities, wages, services, and salaries which take place at local establishments.

The most common activity in nearby downtown Lancaster is retail, with a variety of store types and sizes currently in business. We modeled a small retail store providing groceries and produce. Such a store could be located in the government/manufacturing complex and serve employees of the facility as well as the surrounding neighborhood providing staples. A small retail store with approximately 10 total employees was modeled as a potential future business activity. Based on an economic impact analysis completed for this project (see Appendix A), a new retail store with 10 employees could generate \$473,305 in additional value in the local economy and add an additional 0.7 employees (total of 10.7) in the city. More importantly, the activity at this new retail store will attract people to the area, contributing to other economic activity.

We also modeled a limited-service restaurant with approximately 5 employees. It is another business activity that could be co-located on the campus serving the neighborhood and people at the government center and manufacturers. (See Appendix A). The restaurant could be a quick service diner, offer grab-and-go meals, provide catering to the center, and support a food

truck for Lancaster events. The model predicts that such a restaurant would generate an additional 0.3 jobs (5.3 total) in the local economy and stimulate \$174,109 in value-added in the local economy.

These are four examples of prospective economic activities that may be expected as the former Springs Mill site is redeveloped, people are employed at the site, and spending increases in the neighborhood and city. Each new storefront or place of business will further solidify the site as a center of activity and economic generation for the city.

Potential New Business Impact

65 jobs

\$21.3M annual output

Redevelopment Steps

Redevelopment of the former Springs Mill site will take diligence, creativity, funding opportunities, and most of all, champions. Like most challenging redevelopment projects, it will likely take two steps forward and one back. The key to success will be champions committed to advancing the vision. Through the engagement process, we found several champions who can carry this project forward.

Communications Strategy

The Brooklyn neighborhood has a history of being disenfranchised. Throughout the redevelopment study process, the consultants heard loud and clear that the community should be engaged through constant communications and feedback loops.

- Organize a Community Redevelopment Task Force with membership from the city, Red Rose City Development Corporation, and key neighborhood leaders. Examples of area nonprofits that could be included are Promise Neighborhood, Fatherhood Project, and local ministers. Meet quarterly until redevelopment ramps up, then monthly. The goal is to provide first-hand information to neighborhood leaders on the redevelopment plan.
- Hold community meetings every six months to provide updates. Invite the entire city with specific intention to draw participation from the Brooklyn neighborhood.
 - Canvass the neighborhood handing out flyers that include updates.
- Create a page on the city's website for updates on the redevelopment project. This could be a blog-style page with entries by date.
- Create a project brief (starting with the summary brochure provided in this study) that can be shared and tagged in online communications.
- Use social media to communicate redevelopment updates - #SpringsMillRedevelopment.
- Develop a speakers' bureau (of a few RRCDC members) to give updates to churches, civic groups, and nonprofits.
- At every appropriate point in the redevelopment process, engage the community, seeking input. For example, in charrettes for site planning, building design, transportation improvements, etc.

Project Commitment

This project will need widespread commitment from government, business, and nonprofits. Formal records of commitment will be important to funding sources.

- Request the city pass a resolution of support that includes a commitment to allocate staff and financial resources. The resolution can be used to support grant applications.
- Request a resolution of support from the county to be included in grant applications.

- Other organizations which could adopt resolutions of support include Lancaster County Economic Development, Lancaster County Chamber of Commerce, nonprofits such as Promise Neighborhood, and USC.

Secure the Property

Accelerate the timeline to transfer ownership of the site to the Red Rose City Development Corporation. No progress can be made on the brownfield's agreement or funding requests until the property is owned by the city's nonprofit development corporation.

We recommend appointing a city staff person as Redevelopment Project Manager and Staff Liaison to the RRCDC. Formally placing the redevelopment with a city staff person will ensure it remains a priority.

Discuss with the county whether the property will remain in the county or be annexed into the city. Advantages to annexing the property include more city control of the development and the city's ability to advance the project and grant requests. A disadvantage is additional taxes companies would pay.

Brownfields Program

Participating in the Brownfields Program will open the door to funding and redevelopment opportunities. Brownfields are properties for which the expansion, redevelopment, or reuse may be complicated by the presence or potential presence of hazardous substances, pollutants, or contaminants. Former textile mills often have real contamination from industrial process. However, brownfield sites only need to have the potential for contaminants. The former Springs Mill facility is an ideal candidate for the Brownfields Program.

From SC Department of Health and Environmental Control - "The Brownfields component of the Voluntary Cleanup Program allows a non-responsible party to acquire a contaminated property with State Superfund liability protection for existing contamination by agreeing to perform an environmental assessment and/or remediation. The amount of environmental work is site specific and dependent on the intended future use of the site. Our goal is to facilitate redevelopment of a property that hopefully will create new jobs and boost our economy, while protecting human health and the environment.

Once staff and a non-responsible party have agreed upon an approved scope of work for a site investigation and/or remediation, the party enters into a voluntary cleanup contract. Staff oversees the cleanup efforts to ensure that activities are performed to our satisfaction. Upon completion of the negotiated work in the voluntary cleanup contract, the non-responsible party receives State Superfund liability protection."

Local governments, businesses, non-profit organizations, and public and private parties across South Carolina are eligible to apply for a total of \$900,000 in revolving loan funds as long as they are a non-responsible party performing a removal action under South Carolina's Brownfields/Voluntary Cleanup Program.

Funding

Funding opportunities will depend upon the pursued use, development partners, and ownership entity. Below are a few suggestions beyond the brownfields revolving loan program.

Government Services Complex

- U.S. Economic Development Administration, USDA Rural Development, and other federal funding partners may provide grant opportunities to expand government services operations. For example, the recent pandemic relief funds were available for public safety. There may be similar funding in the future.
- U.S. Economic Development Administration has been a funding partner on the construction/redevelopment of facilities that will create jobs.
- Partnerships with local governments in the region could provide opportunity for consolidated back office services. There could be grants for regional government cooperation projects. In addition to grants, multiple local governments could pool funding for a regional services complex. Do not overlook special state legislative appropriations for public services during post-pandemic recovery.
- Since one use of the government services center would be training, explore funding partnerships with higher educational institutions for shared training space (technical college system, USC system). An educational partner could be the grant conduit.

Light Manufacturing Flex Space – Seek a U.S. Economic Development Administration grant to study the feasibility of space for small manufacturers as part of an economic recovery strategy from the pandemic. U.S. EDA has recently funding studies for entrepreneurship hubs which could include flex space for small manufacturers. In South Carolina a good example is the manufacturing incubator in Abbeville, SC. It was funded through several federal and state programs.

There are some foundations, such as the Arras Foundation, that support community development projects.

Development Entity

In addition to the site itself, facilities will most likely be owned by a public or nonprofit entity, such as the city or Red Rose City Development Corporation. RRCDC could build and lease facilities to government entities and the private sector. For example, RRCDC could be the developer/owner of office or flex space, renting to government and small manufacturers. If this is the case, the internal capacity for administration at RRCDC will need to be expanded. This could be done through an agreement with the City of Lancaster to provide staff support.

Appendix A: Economic Impact Scenarios of Potential New Business Activities

Introduction

This analysis estimates the economic impacts of four types of potential new economic activities at the former Springs Mills site in Lancaster, South Carolina. The city is interested in redeveloping this site to enhance the neighborhood, provide job opportunities, and maximize the use of the land for the local economy. Examples of new businesses that could be successful here include a small grocery store, a limited-service restaurant, light manufacturing, and expanded local government operations. We modeled these example businesses, or “what-if” scenarios, to show Lancaster the potential economic impact and return to the city for investments in redevelopment.

Creative Economic Development Consulting uses IMPLAN software for economic impact modeling. IMPLAN develops local level input-output models to estimate the economic impact of new companies moving into an area, plant closures, and other development and economic activities. This model is widely used by local, state, and federal government agencies as well as private industry and universities. The following table summarizes data and assumptions used in developing the economic impact model for this project.

Project Location	Lancaster, SC
IMPLAN Sectors	IMPLAN Sector 337 - Wiring Device Manufacturer IMPLAN Sector 352 – Other Motor Vehicle Parts Manufacturer IMPLAN Sector 406 – Retail- Food and Beverage Store IMPLAN Sector 510 – Limited-Service Restaurant IMPLAN Sector 534 – Other Local Government Employment

Project Specifications for New Developments

Estimated Employment	
Additional Local Government Employment	20
New Light Manufacturing Employers	20
New Grocery Store	10
New Limited-Service Restaurant	5
Total	83

Example: New Light Manufacturing Operations Impact

With prior uses in the industrial sector, it may be possible to attract multiple light manufacturers to the site. Light manufacturing such as communication device assembly or motor vehicle parts assembly will have a higher return to the local economy than retail uses. If one or more light manufacturers were to employ up to 20 people, that would generate another four jobs in the City of Lancaster, and for Lancaster County, there would be 11 jobs in addition to the 20 jobs at the manufacturing site. These additional jobs include jobs locally in the supply chain and new jobs stimulated to support the personal expenditures associated with the wages at the manufacturer. The jobs associated with light manufacturing will be permanent and continuous jobs, therefore these impacts will continue on an annual basis. The ongoing operations of the manufacturers will account for **\$11.9 million** in new output in the City of Lancaster and **\$4.5 million** in value added to city businesses. In Lancaster County, the total new output is **\$13.1 million**, and value added to county businesses is **\$5.2 million**.

Manufacturing Operations Impacts – City of Lancaster (Zip 29720)

	Employment	Value Added	Output
Direct Effect	20	\$4,168,287	\$11,167,824
Indirect Effect	3	\$287,070	\$570,845
Induced Effect	1	\$70,464	\$120,168
Total Effect	24	\$4,525,822	\$11,858,838

Manufacturing Operations Impacts – Lancaster County, SC

	Employment	Value Added	Output
Direct Effect	20	\$4,168,287	\$11,167,824
Indirect Effect	7	\$720,184	\$1,307,171
Induced Effect	5	\$380,110	\$645,844
Total Effect	31	\$5,268,582	\$13,120,839

Example: New Retail Operations Impact

A new retail store providing groceries and produce will serve the residential community as well as employees at the site. A small grocery store is estimated to employ 10 people in Lancaster. This economic activity will stimulate approximately one additional job throughout the city in the supply chain and business relationships of the store. In Lancaster County, there will be two jobs associated with the supply chain and wages and personal spending of the store. The jobs associated with the store will be permanent and continuous jobs, therefore these impacts will continue on an annual basis. The ongoing operations of the store will account for **\$821,720** in new output in the city of Lancaster and **\$473,305** value added to town businesses. In Lancaster County, there will be total value added of **\$601,093** and increased output of **\$1,047,740**.

Retail Operations Impacts – City of Lancaster (Zip 29720)

	Employment	Value Added	Output
Direct Effect	10.0	\$420,718	\$713,139
Indirect Effect	0.5	\$38,537	\$84,633
Induced Effect	0.2	\$14,050	\$23,948
Total Effect	10.7	\$473,305	\$821,720

Retail Operations Impacts – Lancaster County, SC

	Employment	Value Added	Output
Direct Effect	10	\$420,718	\$713,139
Indirect Effect	1	\$115,368	\$224,148
Induced Effect	1	\$65,007	\$110,453
Total Effect	12	\$601,093	\$1,047,740

Example: New Restaurant Operations Impact

A new limited-service restaurant is estimated to directly employ 5 people in Lancaster. This restaurant will serve the neighborhood, employees at the site, and through traffic. This economic activity will stimulate another 0.3 jobs throughout the city in the supply chain and business relationships of the restaurant. In Lancaster County, there will be an additional job in the supply chain and business relationships. The ongoing operations of the restaurant will account for **\$409,797** in new output in Lancaster and **\$174,109** in value added to city businesses. In Lancaster County, the additional value added is \$254,935 and increase in total output is \$547,264. While the restaurant's monetary contribution to the local economy is modest, it will provide job opportunities and services for the neighborhood, strengthening its retail profile.

Restaurant Operations Impacts – City of Lancaster (Zip 29720)

	Employment	Value Added	Output
Direct Effect	5.0	\$146,352	\$352,806
Indirect Effect	0.3	\$22,844	\$48,617
Induced Effect	0.1	\$4,912	\$8,373
Total Effect	5.3	\$174,109	\$409,797

Restaurant Operations Impacts – Lancaster County, SC

	Employment	Value Added	Output
Direct Effect	5	\$146,352	\$352,806
Indirect Effect	1	\$81,321	\$148,139
Induced Effect	0	\$27,261	\$46,319
Total Effect	6	\$254,935	\$547,264

Example: New Local Government Operations Impact

Redevelopment of the site is expected to create additional opportunities for local government operations, perhaps including maintenance for public sector vehicles and equipment, a consolidated back-office center for local government information calls, finance processing, etc. Expansion of training operations will allow for increased traffic from public safety personnel, and a satellite police station is another possibility. If there is an increase of **20 local government jobs** at the site, this economic activity will stimulate another **5 jobs** throughout the city in the supply chain and business relationships. An additional new job will be attributed to this economic activity in the city to support the personal expenditures associated with the wages of the increase in government employees. For Lancaster County, there will be an increase of **12 indirect jobs** in the supply chain and business relationships and another **5 jobs** from the personal expenditures of the new local government employees. The jobs associated with the new operations will be permanent and continuous jobs, therefore these impacts will continue on an annual basis. The ongoing operations of the local government operations will account for **\$8.2M** in new output in the city of Lancaster and **\$4.5M** in value added to city businesses. For Lancaster County, the new output will be **\$10.1M** and new value added for county businesses will be **\$5.5m**.

Additional Local Government Operations Impacts – City of Lancaster (Zip 29720)

	Employment	Value Added	Output
Direct Effect	20	\$3,973,539	\$7,230,165
Indirect Effect	5	\$403,624	\$894,086
Induced Effect	1	\$73,570	\$125,432
Total Effect	26	\$4,450,733	\$8,249,683

Additional Local Government Operations Impacts – Lancaster County, SC

	Employment	Value Added	Output
Direct Effect	20	\$3,973,539	\$7,230,165
Indirect Effect	12	\$1,096,180	\$2,197,753
Induced Effect	5	\$410,209	\$696,982
Total Effect	37	\$5,479,927	\$10,124,900

Total Operations Impact of Example Developments

To derive the total economic impact of these example developments, we added the impacts of the new grocery store, the new restaurant, the new light manufacturer, and the expanded local government operations. The total impact of the new developments for the city of Lancaster is approximately **65** jobs and **\$21M** in additional output in the economy. Looking at Lancaster County, the total new jobs is **86** with additional economic output of **\$25M**.

Total New Developments Operations Impacts – City of Lancaster (Zip 29720)

	Employment	Value Added	Output
Direct Effect	55	\$8,708,897	\$19,463,935
Indirect Effect	8	\$752,075	\$1,598,182
Induced Effect	2	\$162,997	\$277,922
Total Effect	65	\$9,623,969	\$21,340,038

Total New Developments Operations Impacts – Lancaster County, SC

	Employment	Value Added	Output
Direct Effect	55	\$8,708,897	\$19,463,935
Indirect Effect	21	\$2,013,053	\$3,877,211
Induced Effect	11	\$882,587	\$1,499,598
Total Effect	86	\$11,604,537	\$24,840,743

IMPLAN Economic Impact Definitions

Source: www.implan.com

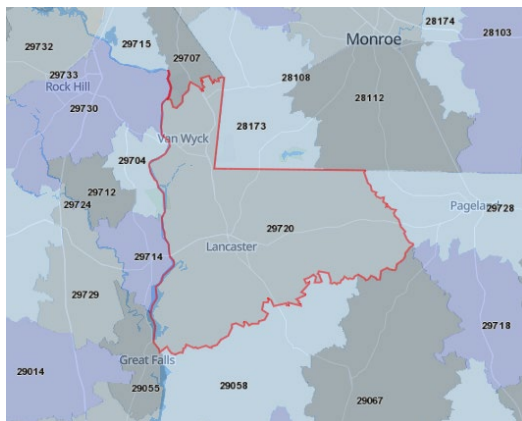
- Direct Impacts: The known or predicted change in the economy that is being studied.
- Indirect Impact: Secondary impact caused to industries in the supply chain of the direct impact.
- Induced Impact: Direct and indirect employment (and increases in labor income) creates additional household spending on goods and services.
- Employment: The number of full-time and part-time jobs; measured by place of employment. Employees, sole proprietors, and active partners are included, but unpaid family workers and volunteers are not.
- Job-Years: IMPLAN measures employment impacts in job-years with each unit of employment equivalent to one job for one year. This is important when IMPLAN is used to measure construction or other non-permanent operations. For example, IMPLAN does not distinguish between ten units of employment (workers) employed over five years, and fifty workers employed in one year. Therefore, one construction worker may account for multiple units of employment if that person is employed over multiple years. Unlike construction impacts, operation employment and economic activity are illustrated as yearly impact estimates. That is, the impacts shown can be expected to occur in every year.
- Output: The amount of production, including all intermediate goods purchased, as well as value added (compensation and profit). Output is equal to sales in service industries and equal to sales plus the change in inventory for manufacturers.
- Value Added: Value added is the difference between total output and the cost of intermediate inputs. Value added is a measure of an individual producer, industry, or sector's contribution to the state's gross domestic product.
- This analysis was produced using IMPLAN and model year 2018.

Disclaimer: Economic modeling provides general impact estimates for economic development projects. However, future results will be affected by political, social, and economic conditions. Economic modeling is most informative when used in conjunction with other forms of analysis, such as cost-benefit analysis and fiscal impact analysis, to estimate the overall impact of a project. The completion of this analysis by Creative EDC is neither an endorsement for nor against this project. Additionally, the analysis is based on information provided by the developer and consultant. If that information were to change for any reason, it would change the results of the analysis.

Geographic Definitions

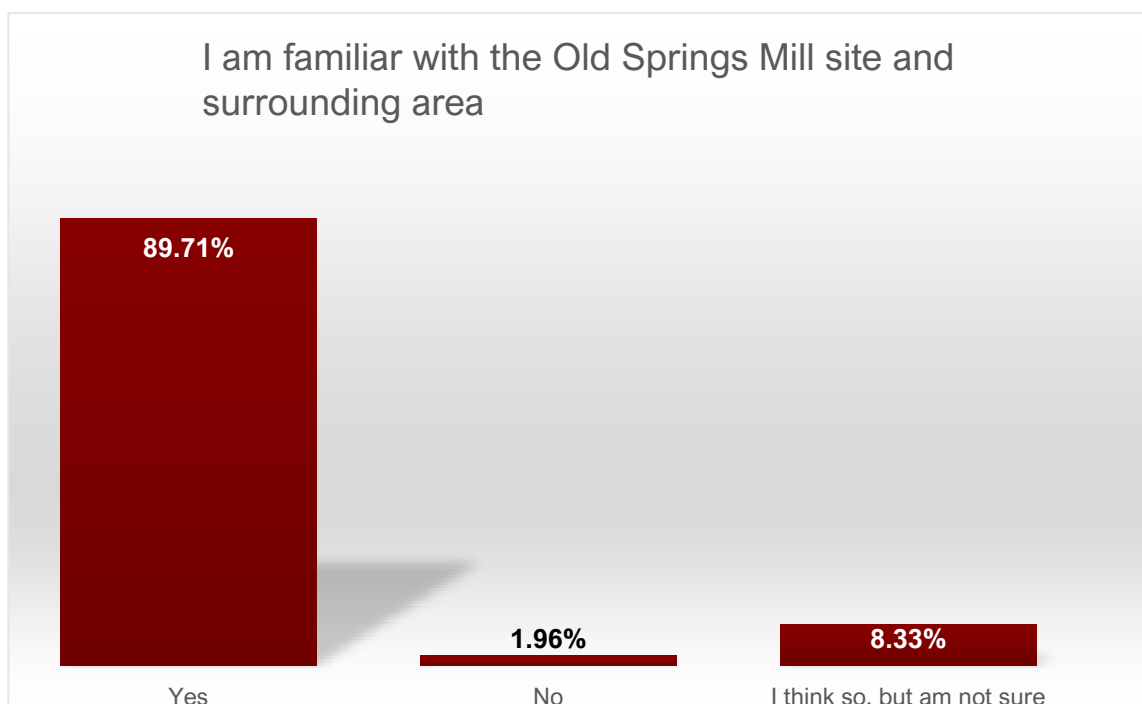
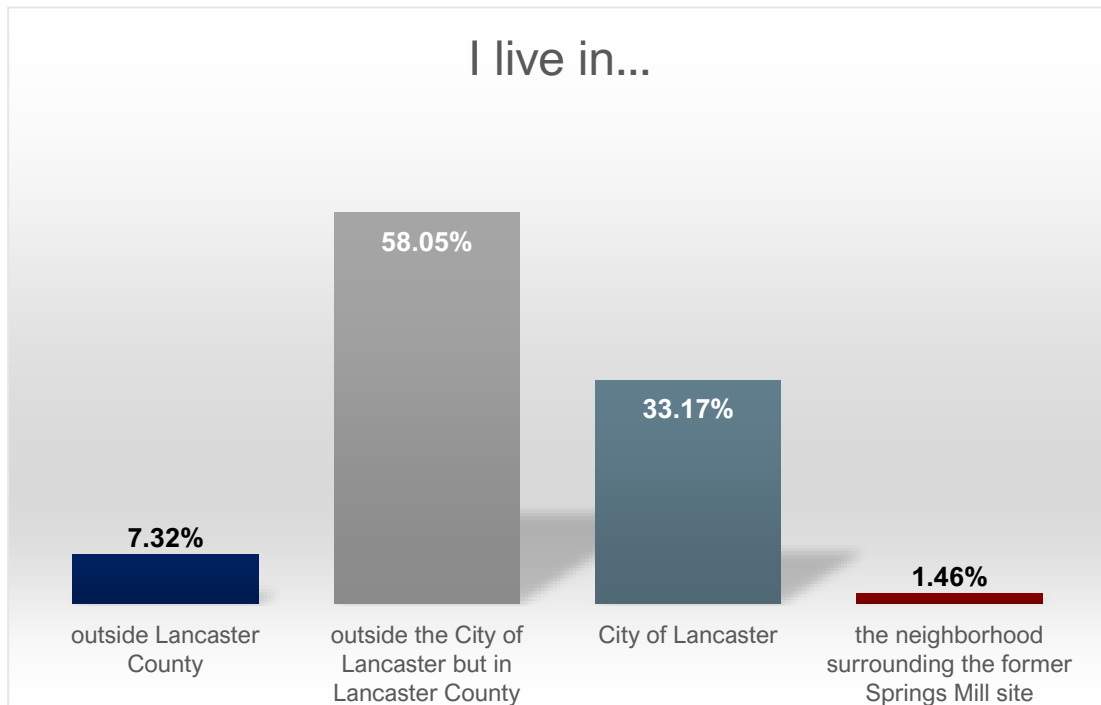
Due to limitations of the IMPLAN software and municipal boundaries, the city of Lancaster was modeled based on zip code 29720. This area has an estimated population of 46,041 and is larger than the city of Lancaster.

Lancaster, SC Zip Code 29720



Appendix B: Community Survey Results

The City of Lancaster distributed an online survey to databases, posted on its website, shared on social media, and asked partners to promote the survey. There were 205 responses to the survey, a good response for a community the size of Lancaster.



What are three potential new uses for the former mill site? *(responses summarized by removing duplicates)*

Top Responses:

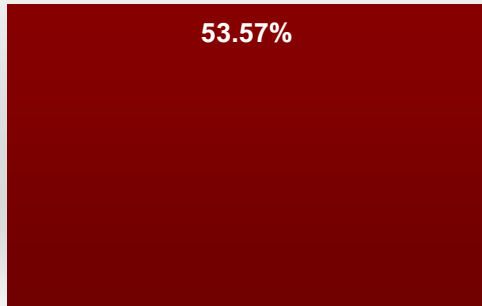
Family park with picnic shelters, walking track, pond, ball fields, amphitheater, greenway
Sports complex
Affordable housing
Apartments with amenities
Manufacturing facility
Restaurant, coffee shop, food truck venue, breweries
Community center
Youth center
Business Incubator
Shopping center
Retail shops
Warehouse/Distribution Center
Senior housing
Farmers Market
Community farm and market
YMCA
Job training center
Training center for all city and county police, fire, medics
Conference center

Other responses:

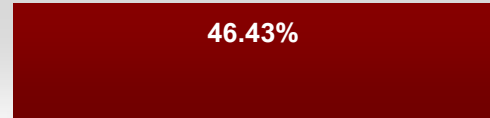
Open theater, concert venue
Artist studios with living quarters
Transportation museum including autos, trains, planes, bicycles
Coworking space
Camp for underprivileged youth
Tiny home community
Solar farm
Water park
Educational/children's museum, discovery science center
Downtown hotel
Social and median services

Skateboard park
City/county offices
Bakery
Freight transfer
Homeless shelter
Landfill
Research campus for USC Medical
School
Childcare center
Historical park
Amusement park
Sports arena
Flea market
Entertainment venues, arcade, Top Golf
Lancaster campus for York Tech

Are there any uses of the site you are opposed to?



No



If yes, list the uses you are opposed to:

If yes, list the uses you are opposed to:

Top Responses:

Anything pertaining to alcohol sales
Anything that will result in gentrification
Anything that marginalizes citizens
Anything that puts kids at risk
Environmentally irresponsible behaviors
Chemical storage
Hazardous materials
Manufacturing that produces waste,
outside storage, noise
Apartments
Government, low-income housing
Industrial

Other responses:

Sports center
Junk yards, industrial recycling

Monument to Springs Mill
Fast food restaurants
Commercial development
Racetrack
Night club
Shopping places
Police station
Vape sales
Bank
Museum
Recreational space
Wedding venue
Warehousing
Storage units
Pharmacies
Doctor offices
Office space

What are three challenges in redeveloping the former mill site?

(responses summarized by removing duplicates)

Surrounding area	Truck access
Cost of cleanup, development, economic feasibility	Thinking too small
Contamination	Public investment in the project
Finding the right vision for future use	Train access
Mill-town mentality	Fire and EMS response
Security in the area	Opposition
Crime, vandalism	Lack of natural landscape features
Foundation of former building	Infrastructure
Location	Lack of interest
Do not displace residents	Outside city limits
Community apathy	Active railroad
Community buy-in	Marketing the site
Depressed property values in the area	Not thinking outside the box
	Not connected to downtown

What are some organizations in Lancaster that should be involved in redeveloping the site? *(responses summarized by removing duplicates)*

City of Lancaster, Public Safety, Planning, Zoning, Inspections, Parks and Recreation Departments	Springs Family/Foundation
Lancaster County	Lancaster County Airport
Lancaster Chamber of Commerce	Tourism organizations
Arras Foundation	SC DOT
Lancaster County Economic Development	Civic clubs and organizations, garden clubs
University of South Carolina Lancaster	Realtors
Churches	The Children's Council
Promise Neighborhood	Partners for Youth
Fatherhood	Coalition for Healthy Youth
Founders Federal Credit Union	Hope of Lancaster
United Way	Carolina Community Action
Lancaster Rotary Club	Historical Association
Builder Supply	HOPE
Founders Federal Credit Union	State agencies
Area residents and businesses	Better Business Bureau
A Father's Way	Arts Council
Lindsay Pettus Greenway	Housing Authority of Lancaster
NAACP	Habitat for Humanity
Counsel on Aging	Battered but not Broken Ministries
	MUSC Health

Nutramax
Catawba Regional Development
Corporation/Council of Governments

DHECUtilities
Native American Studies Center
Katawba Valley Land Trust

For any redevelopment project to be successful, the whole neighborhood must be a part of the vision. **What support does the surrounding neighborhood need to make a redevelopment project successful?**

(responses summarized by removing duplicates)

Be informed, communication, a concerted effort to inform, educate, and gain input
Neighborhood cleanup and improvement
Involvement of people and businesses in the area
Consensus on vision
Community leadership
Lower crime
Coordination with churches, civic, and community groups
Jobs
Property redevelopment/revitalization
Commitment
Improved traffic flow
Broadband
Partnership with police and community crime watch
Code enforcement

What is the one key to making redevelopment of this property a success? *(responses summarized by removing duplicates)*

Buy-in from the community, community backing	Clear vision
Safety	Transparency
Communication	Teamwork
Neighborhood cleanup and improvement	Environmental green light
Consider all input	Link to matters of social justice
Money, private and public investment	Aesthetically pleasing
Commitment from city and county	Unified neighborhood approach
Persistence	New businesses and people in the area
Leadership	Beautification
	Property owner commitment
	Integration into city master plan

Appendix C: Market Profiles for Lancaster and 1, 3, and 5-mile Radii of the Site

(on the following pages)

DRAFT



Market Profile

Lancaster City, SC
Lancaster City, SC (4539895)
Geography: Place

Prepared by Esri

		Lancaster cit...
Population Summary		
2000 Total Population		8,532
2010 Total Population		8,523
2019 Total Population		8,825
2019 Group Quarters		128
2024 Total Population		9,055
2019-2024 Annual Rate		0.52%
2019 Total Daytime Population		12,774
Workers		7,126
Residents		5,648
Household Summary		
2000 Households		3,525
2000 Average Household Size		2.38
2010 Households		3,509
2010 Average Household Size		2.40
2019 Households		3,618
2019 Average Household Size		2.40
2024 Households		3,711
2024 Average Household Size		2.41
2019-2024 Annual Rate		0.51%
2010 Families		2,159
2010 Average Family Size		3.05
2019 Families		2,194
2019 Average Family Size		3.08
2024 Families		2,231
2024 Average Family Size		3.09
2019-2024 Annual Rate		0.34%
Housing Unit Summary		
2000 Housing Units		3,919
Owner Occupied Housing Units		47.3%
Renter Occupied Housing Units		42.7%
Vacant Housing Units		10.1%
2010 Housing Units		3,980
Owner Occupied Housing Units		40.4%
Renter Occupied Housing Units		47.8%
Vacant Housing Units		11.8%
2019 Housing Units		4,123
Owner Occupied Housing Units		48.3%
Renter Occupied Housing Units		39.4%
Vacant Housing Units		12.2%
2024 Housing Units		4,229
Owner Occupied Housing Units		49.4%
Renter Occupied Housing Units		38.3%
Vacant Housing Units		12.2%
Median Household Income		
2019		\$32,946
2024		\$38,947
Median Home Value		
2019		\$128,167
2024		\$138,242
Per Capita Income		
2019		\$23,136
2024		\$26,160
Median Age		
2010		36.8
2019		39.1
2024		40.1

Data Note: Household population includes persons not residing in group quarters. Average Household Size is the household population divided by total households. Persons in families include the householder and persons related to the householder by birth, marriage, or adoption. Per Capita Income represents the income received by all persons aged 15 years and over divided by the total population.

Source: U.S. Census Bureau, Census 2010 Summary File 1. Esri forecasts for 2019 and 2024 Esri converted Census 2000 data into 2010 geography.



Market Profile

Lancaster City, SC
Lancaster City, SC (4539895)
Geography: Place

Prepared by Esri

		Lancaster cit...
2019 Households by Income		
Household Income Base		3,617
<\$15,000		22.1%
\$15,000 - \$24,999		17.2%
\$25,000 - \$34,999		12.8%
\$35,000 - \$49,999		8.5%
\$50,000 - \$74,999		15.5%
\$75,000 - \$99,999		8.7%
\$100,000 - \$149,999		9.3%
\$150,000 - \$199,999		2.4%
\$200,000+		3.6%
Average Household Income		\$57,171
2024 Households by Income		
Household Income Base		3,709
<\$15,000		19.7%
\$15,000 - \$24,999		15.5%
\$25,000 - \$34,999		12.3%
\$35,000 - \$49,999		7.8%
\$50,000 - \$74,999		16.9%
\$75,000 - \$99,999		9.8%
\$100,000 - \$149,999		11.1%
\$150,000 - \$199,999		2.9%
\$200,000+		4.0%
Average Household Income		\$64,795
2019 Owner Occupied Housing Units by Value		
Total		1,993
<\$50,000		11.7%
\$50,000 - \$99,999		25.6%
\$100,000 - \$149,999		22.6%
\$150,000 - \$199,999		19.2%
\$200,000 - \$249,999		6.1%
\$250,000 - \$299,999		5.6%
\$300,000 - \$399,999		1.8%
\$400,000 - \$499,999		0.5%
\$500,000 - \$749,999		5.7%
\$750,000 - \$999,999		0.0%
\$1,000,000 - \$1,499,999		1.3%
\$1,500,000 - \$1,999,999		0.0%
\$2,000,000 +		0.0%
Average Home Value		\$173,006
2024 Owner Occupied Housing Units by Value		
Total		2,092
<\$50,000		11.1%
\$50,000 - \$99,999		23.5%
\$100,000 - \$149,999		20.1%
\$150,000 - \$199,999		19.0%
\$200,000 - \$249,999		6.5%
\$250,000 - \$299,999		7.0%
\$300,000 - \$399,999		2.5%
\$400,000 - \$499,999		0.7%
\$500,000 - \$749,999		7.9%
\$750,000 - \$999,999		0.0%
\$1,000,000 - \$1,499,999		1.8%
\$1,500,000 - \$1,999,999		0.0%
\$2,000,000 +		0.0%
Average Home Value		\$195,710

Data Note: Income represents the preceding year, expressed in current dollars. Household income includes wage and salary earnings, interest dividends, net rents, pensions, SSI and welfare payments, child support, and alimony.

Source: U.S. Census Bureau, Census 2010 Summary File 1. Esri forecasts for 2019 and 2024 Esri converted Census 2000 data into 2010 geography.



Market Profile

Lancaster City, SC
Lancaster City, SC (4539895)
Geography: Place

Prepared by Esri

		Lancaster cit...
2010 Population by Age		
Total		8,523
0 - 4		8.2%
5 - 9		6.8%
10 - 14		6.5%
15 - 24		13.8%
25 - 34		12.3%
35 - 44		12.3%
45 - 54		12.4%
55 - 64		11.4%
65 - 74		8.5%
75 - 84		5.6%
85 +		2.3%
18 +		74.7%
2019 Population by Age		
Total		8,824
0 - 4		7.0%
5 - 9		7.0%
10 - 14		6.5%
15 - 24		11.4%
25 - 34		13.1%
35 - 44		11.5%
45 - 54		11.6%
55 - 64		12.5%
65 - 74		10.5%
75 - 84		6.0%
85 +		2.8%
18 +		76.1%
2024 Population by Age		
Total		9,055
0 - 4		6.9%
5 - 9		6.8%
10 - 14		6.8%
15 - 24		11.4%
25 - 34		11.7%
35 - 44		12.3%
45 - 54		11.5%
55 - 64		12.0%
65 - 74		11.1%
75 - 84		6.9%
85 +		2.7%
18 +		76.2%
2010 Population by Sex		
Males		3,915
Females		4,608
2019 Population by Sex		
Males		4,100
Females		4,724
2024 Population by Sex		
Males		4,248
Females		4,807

Source: U.S. Census Bureau, Census 2010 Summary File 1. Esri forecasts for 2019 and 2024 Esri converted Census 2000 data into 2010 geography.



Market Profile

Lancaster City, SC
Lancaster City, SC (4539895)
Geography: Place

Prepared by Esri

		Lancaster cit...
2010 Population by Race/Ethnicity		
Total		8,523
White Alone		43.0%
Black Alone		51.3%
American Indian Alone		0.2%
Asian Alone		0.9%
Pacific Islander Alone		0.0%
Some Other Race Alone		3.5%
Two or More Races		1.1%
Hispanic Origin		5.7%
Diversity Index		60.0
2019 Population by Race/Ethnicity		
Total		8,826
White Alone		39.8%
Black Alone		52.0%
American Indian Alone		0.2%
Asian Alone		0.6%
Pacific Islander Alone		0.0%
Some Other Race Alone		5.6%
Two or More Races		1.7%
Hispanic Origin		8.1%
Diversity Index		63.5
2024 Population by Race/Ethnicity		
Total		9,055
White Alone		38.4%
Black Alone		52.4%
American Indian Alone		0.2%
Asian Alone		0.6%
Pacific Islander Alone		0.0%
Some Other Race Alone		6.5%
Two or More Races		1.9%
Hispanic Origin		9.1%
Diversity Index		64.8
2010 Population by Relationship and Household Type		
Total		8,523
In Households		98.7%
In Family Households		80.5%
Householder		25.3%
Spouse		12.8%
Child		34.5%
Other relative		4.7%
Nonrelative		3.1%
In Nonfamily Households		18.2%
In Group Quarters		1.3%
Institutionalized Population		0.4%
Noninstitutionalized Population		0.9%

Data Note: Persons of Hispanic Origin may be of any race. The Diversity Index measures the probability that two people from the same area will be from different race/ethnic groups.

Source: U.S. Census Bureau, Census 2010 Summary File 1. Esri forecasts for 2019 and 2024 Esri converted Census 2000 data into 2010 geography.



Market Profile

Lancaster City, SC
Lancaster City, SC (4539895)
Geography: Place

Prepared by Esri

		Lancaster cit...
2019 Population 25+ by Educational Attainment		
Total		6,004
Less than 9th Grade		5.9%
9th - 12th Grade, No Diploma		16.0%
High School Graduate		25.0%
GED/Alternative Credential		3.8%
Some College, No Degree		22.6%
Associate Degree		8.8%
Bachelor's Degree		9.9%
Graduate/Professional Degree		7.9%
2019 Population 15+ by Marital Status		
Total		7,010
Never Married		41.8%
Married		36.5%
Widowed		10.1%
Divorced		11.7%
2019 Civilian Population 16+ in Labor Force		
Civilian Employed		89.9%
Civilian Unemployed (Unemployment Rate)		10.1%
2019 Employed Population 16+ by Industry		
Total		3,224
Agriculture/Mining		0.1%
Construction		2.4%
Manufacturing		18.9%
Wholesale Trade		6.5%
Retail Trade		9.7%
Transportation/Utilities		5.2%
Information		1.2%
Finance/Insurance/Real Estate		3.6%
Services		49.9%
Public Administration		2.4%
2019 Employed Population 16+ by Occupation		
Total		3,225
White Collar		52.1%
Management/Business/Financial		8.4%
Professional		16.2%
Sales		13.2%
Administrative Support		14.4%
Services		19.1%
Blue Collar		28.8%
Farming/Forestry/Fishing		0.5%
Construction/Extraction		1.9%
Installation/Maintenance/Repair		5.8%
Production		10.1%
Transportation/Material Moving		10.6%
2010 Population By Urban/ Rural Status		
Total Population		8,523
Population Inside Urbanized Area		0.0%
Population Inside Urbanized Cluster		99.6%
Rural Population		0.4%

Source: U.S. Census Bureau, Census 2010 Summary File 1. Esri forecasts for 2019 and 2024 Esri converted Census 2000 data into 2010 geography.



Market Profile

Lancaster City, SC
Lancaster City, SC (4539895)
Geography: Place

Prepared by Esri

	Lancaster cit...
2010 Households by Type	
Total	3,509
Households with 1 Person	33.7%
Households with 2+ People	66.3%
Family Households	61.5%
Husband-wife Families	31.0%
With Related Children	12.1%
Other Family (No Spouse Present)	30.5%
Other Family with Male Householder	5.3%
With Related Children	2.5%
Other Family with Female Householder	25.2%
With Related Children	17.4%
Nonfamily Households	4.8%
All Households with Children	32.5%
Multigenerational Households	6.1%
Unmarried Partner Households	7.5%
Male-female	6.7%
Same-sex	0.7%
2010 Households by Size	
Total	3,509
1 Person Household	33.7%
2 Person Household	30.2%
3 Person Household	15.2%
4 Person Household	11.2%
5 Person Household	5.5%
6 Person Household	2.7%
7 + Person Household	1.5%
2010 Households by Tenure and Mortgage Status	
Total	3,509
Owner Occupied	45.8%
Owned with a Mortgage/Loan	29.3%
Owned Free and Clear	16.5%
Renter Occupied	54.2%
2010 Housing Units By Urban/ Rural Status	
Total Housing Units	3,980
Housing Units Inside Urbanized Area	0.0%
Housing Units Inside Urbanized Cluster	99.7%
Rural Housing Units	0.3%

Data Note: Households with children include any households with people under age 18, related or not. Multigenerational households are families with 3 or more parent-child relationships. Unmarried partner households are usually classified as nonfamily households unless there is another member of the household related to the householder. Multigenerational and unmarried partner households are reported only to the tract level. Esri estimated block group data, which is used to estimate polygons or non-standard geography.

Source: U.S. Census Bureau, Census 2010 Summary File 1. Esri forecasts for 2019 and 2024 Esri converted Census 2000 data into 2010 geography.



Market Profile

Lancaster City, SC
Lancaster City, SC (4539895)
Geography: Place

Prepared by Esri

		Lancaster cit...
Top 3 Tapestry Segments		
1.		Modest Income Homes (12D)
2.		Hardscrabble Road (8G)
3.		Comfortable Empty Nesters
2019 Consumer Spending		
Apparel & Services: Total \$		\$5,168,392
Average Spent		\$1,428.52
Spending Potential Index		67
Education: Total \$		\$3,578,170
Average Spent		\$988.99
Spending Potential Index		62
Entertainment/Recreation: Total \$		\$7,924,329
Average Spent		\$2,190.25
Spending Potential Index		67
Food at Home: Total \$		\$12,974,403
Average Spent		\$3,586.07
Spending Potential Index		69
Food Away from Home: Total \$		\$8,806,006
Average Spent		\$2,433.94
Spending Potential Index		66
Health Care: Total \$		\$15,180,540
Average Spent		\$4,195.84
Spending Potential Index		71
HH Furnishings & Equipment: Total \$		\$5,078,331
Average Spent		\$1,403.63
Spending Potential Index		66
Personal Care Products & Services: Total \$		\$2,129,610
Average Spent		\$588.62
Spending Potential Index		66
Shelter: Total \$		\$43,479,676
Average Spent		\$12,017.60
Spending Potential Index		65
Support Payments/Cash Contributions/Gifts in Kind: Total \$		\$6,022,071
Average Spent		\$1,664.47
Spending Potential Index		67
Travel: Total \$		\$4,933,551
Average Spent		\$1,363.61
Spending Potential Index		61
Vehicle Maintenance & Repairs: Total \$		\$2,837,909
Average Spent		\$784.39
Spending Potential Index		69

Data Note: Consumer spending shows the amount spent on a variety of goods and services by households that reside in the area. Expenditures are shown by broad budget categories that are not mutually exclusive. Consumer spending does not equal business revenue. Total and Average Amount Spent Per Household represent annual figures. The Spending Potential Index represents the amount spent in the area relative to a national average of 100.

Source: Consumer Spending data are derived from the 2016 and 2017 Consumer Expenditure Surveys, Bureau of Labor Statistics. Esri.

Source: U.S. Census Bureau, Census 2010 Summary File 1. Esri forecasts for 2019 and 2024 Esri converted Census 2000 data into 2010 geography.



Market Profile

Lancaster Lat/Log Radii
900-920 12th St, Lancaster, South Carolina, 29720
Rings: 1, 3, 5 mile radii

Prepared by Esri
Latitude: 34.71237
Longitude: -80.77591

	1 mile	3 miles	5 miles
Population Summary			
2000 Total Population	5,192	19,583	30,935
2010 Total Population	4,960	19,658	31,808
2019 Total Population	5,054	20,388	32,897
2019 Group Quarters	49	321	475
2024 Total Population	5,133	20,926	33,904
2019-2024 Annual Rate	0.31%	0.52%	0.60%
2019 Total Daytime Population	6,961	23,432	31,773
Workers	3,657	10,758	12,071
Residents	3,304	12,674	19,702
Household Summary			
2000 Households	2,118	7,844	12,056
2000 Average Household Size	2.43	2.45	2.52
2010 Households	1,977	7,776	12,408
2010 Average Household Size	2.48	2.48	2.52
2019 Households	1,985	8,011	12,766
2019 Average Household Size	2.52	2.50	2.54
2024 Households	2,008	8,216	13,144
2024 Average Household Size	2.53	2.51	2.54
2019-2024 Annual Rate	0.23%	0.51%	0.59%
2010 Families	1,207	5,105	8,519
2010 Average Family Size	3.14	3.04	3.03
2019 Families	1,173	5,125	8,556
2019 Average Family Size	3.24	3.11	3.09
2024 Families	1,174	5,211	8,738
2024 Average Family Size	3.27	3.13	3.10
2019-2024 Annual Rate	0.02%	0.33%	0.42%
Housing Unit Summary			
2000 Housing Units	2,409	8,604	12,998
Owner Occupied Housing Units	39.4%	53.4%	62.4%
Renter Occupied Housing Units	48.5%	37.7%	30.3%
Vacant Housing Units	12.1%	8.8%	7.2%
2010 Housing Units	2,370	8,778	13,713
Owner Occupied Housing Units	31.9%	47.3%	57.3%
Renter Occupied Housing Units	51.5%	41.3%	33.2%
Vacant Housing Units	16.6%	11.4%	9.5%
2019 Housing Units	2,413	9,082	14,147
Owner Occupied Housing Units	37.1%	52.9%	62.2%
Renter Occupied Housing Units	45.2%	35.3%	28.1%
Vacant Housing Units	17.7%	11.8%	9.8%
2024 Housing Units	2,447	9,313	14,551
Owner Occupied Housing Units	37.9%	53.8%	63.1%
Renter Occupied Housing Units	44.1%	34.4%	27.2%
Vacant Housing Units	17.9%	11.8%	9.7%
Median Household Income			
2019	\$23,404	\$32,890	\$39,064
2024	\$26,309	\$39,528	\$49,585
Median Home Value			
2019	\$85,217	\$121,341	\$132,687
2024	\$90,596	\$135,453	\$149,732
Per Capita Income			
2019	\$15,356	\$20,499	\$22,400
2024	\$17,636	\$23,381	\$25,534
Median Age			
2010	33.3	36.4	38.0
2019	34.5	37.9	39.7
2024	35.3	39.1	41.0

Data Note: Household population includes persons not residing in group quarters. Average Household Size is the household population divided by total households. Persons in families include the householder and persons related to the householder by birth, marriage, or adoption. Per Capita Income represents the income received by all persons aged 15 years and over divided by the total population.

Source: U.S. Census Bureau, Census 2010 Summary File 1. Esri forecasts for 2019 and 2024 Esri converted Census 2000 data into 2010 geography.



Market Profile

Lancaster Lat/Log Radi
900-920 12th St, Lancaster, South Carolina, 29720
Rings: 1, 3, 5 mile radii

Prepared by Esri
Latitude: 34.71237
Longitude: -80.77591

	1 mile	3 miles	5 miles
2019 Households by Income			
Household Income Base	1,985	8,011	12,766
<\$15,000	28.7%	20.2%	16.8%
\$15,000 - \$24,999	23.9%	18.6%	17.1%
\$25,000 - \$34,999	12.0%	13.4%	13.1%
\$35,000 - \$49,999	8.6%	8.7%	9.2%
\$50,000 - \$74,999	14.3%	15.6%	16.7%
\$75,000 - \$99,999	4.6%	11.1%	12.8%
\$100,000 - \$149,999	4.8%	8.8%	10.3%
\$150,000 - \$199,999	1.9%	1.5%	1.6%
\$200,000+	1.1%	2.1%	2.5%
Average Household Income	\$39,674	\$52,825	\$57,687
2024 Households by Income			
Household Income Base	2,008	8,216	13,144
<\$15,000	25.8%	17.7%	14.5%
\$15,000 - \$24,999	22.2%	16.8%	15.3%
\$25,000 - \$34,999	12.2%	12.7%	12.3%
\$35,000 - \$49,999	8.3%	7.8%	8.1%
\$50,000 - \$74,999	16.0%	17.0%	17.7%
\$75,000 - \$99,999	5.7%	12.8%	14.5%
\$100,000 - \$149,999	6.2%	10.9%	12.7%
\$150,000 - \$199,999	2.4%	1.9%	2.0%
\$200,000+	1.3%	2.4%	2.9%
Average Household Income	\$45,752	\$60,378	\$65,840
2019 Owner Occupied Housing Units by Value			
Total	895	4,804	8,797
<\$50,000	22.8%	13.4%	10.5%
\$50,000 - \$99,999	38.5%	26.8%	23.4%
\$100,000 - \$149,999	19.6%	23.0%	24.6%
\$150,000 - \$199,999	13.1%	17.7%	16.7%
\$200,000 - \$249,999	1.6%	4.5%	7.1%
\$250,000 - \$299,999	0.0%	5.8%	7.5%
\$300,000 - \$399,999	0.0%	3.4%	5.5%
\$400,000 - \$499,999	1.7%	1.8%	1.9%
\$500,000 - \$749,999	0.0%	2.6%	1.8%
\$750,000 - \$999,999	0.0%	0.6%	0.8%
\$1,000,000 - \$1,499,999	2.7%	0.5%	0.3%
\$1,500,000 - \$1,999,999	0.0%	0.0%	0.0%
\$2,000,000 +	0.0%	0.0%	0.0%
Average Home Value	\$126,650	\$156,665	\$165,651
2024 Owner Occupied Housing Units by Value			
Total	928	5,013	9,182
<\$50,000	21.3%	11.9%	9.0%
\$50,000 - \$99,999	35.2%	23.5%	19.8%
\$100,000 - \$149,999	18.9%	20.5%	21.3%
\$150,000 - \$199,999	15.7%	18.5%	17.4%
\$200,000 - \$249,999	1.9%	5.2%	8.1%
\$250,000 - \$299,999	0.0%	7.9%	9.7%
\$300,000 - \$399,999	0.0%	4.4%	7.6%
\$400,000 - \$499,999	2.9%	3.0%	3.2%
\$500,000 - \$749,999	0.0%	3.5%	2.5%
\$750,000 - \$999,999	0.0%	0.8%	1.1%
\$1,000,000 - \$1,499,999	3.9%	0.7%	0.4%
\$1,500,000 - \$1,999,999	0.0%	0.0%	0.0%
\$2,000,000 +	0.0%	0.0%	0.0%
Average Home Value	\$148,975	\$179,354	\$190,052

Data Note: Income represents the preceding year, expressed in current dollars. Household income includes wage and salary earnings, interest dividends, net rents, pensions, SSI and welfare payments, child support, and alimony.

Source: U.S. Census Bureau, Census 2010 Summary File 1. Esri forecasts for 2019 and 2024 Esri converted Census 2000 data into 2010 geography.



Market Profile

Lancaster Lat/Log Radi
900-920 12th St, Lancaster, South Carolina, 29720
Rings: 1, 3, 5 mile radii

Prepared by Esri
Latitude: 34.71237
Longitude: -80.77591

	1 mile	3 miles	5 miles
2010 Population by Age			
Total	4,961	19,656	31,811
0 - 4	9.6%	8.4%	7.5%
5 - 9	7.3%	6.8%	6.5%
10 - 14	6.8%	6.5%	6.5%
15 - 24	14.6%	13.7%	13.5%
25 - 34	13.8%	12.8%	12.1%
35 - 44	12.5%	12.4%	13.0%
45 - 54	12.1%	13.0%	13.8%
55 - 64	10.8%	11.5%	12.5%
65 - 74	6.5%	7.8%	8.2%
75 - 84	4.0%	4.9%	4.6%
85 +	1.8%	2.2%	1.9%
18 +	72.3%	74.3%	75.3%
2019 Population by Age			
Total	5,056	20,389	32,897
0 - 4	8.7%	7.4%	6.6%
5 - 9	8.3%	7.3%	6.7%
10 - 14	7.1%	6.7%	6.4%
15 - 24	12.1%	11.5%	11.0%
25 - 34	14.7%	13.5%	13.5%
35 - 44	12.0%	11.9%	11.9%
45 - 54	11.5%	11.8%	12.6%
55 - 64	11.3%	12.3%	13.1%
65 - 74	8.6%	9.8%	10.7%
75 - 84	4.1%	5.6%	5.6%
85 +	1.8%	2.3%	2.0%
18 +	72.3%	75.2%	76.9%
2024 Population by Age			
Total	5,133	20,925	33,907
0 - 4	8.6%	7.2%	6.4%
5 - 9	8.0%	7.0%	6.4%
10 - 14	7.6%	7.0%	6.7%
15 - 24	12.6%	11.7%	11.0%
25 - 34	12.8%	11.8%	11.6%
35 - 44	12.8%	12.6%	12.7%
45 - 54	11.3%	11.5%	12.0%
55 - 64	11.0%	11.9%	12.8%
65 - 74	8.9%	10.5%	11.3%
75 - 84	4.8%	6.5%	6.8%
85 +	1.6%	2.3%	2.2%
18 +	71.9%	75.0%	76.7%
2010 Population by Sex			
Males	2,332	9,245	15,090
Females	2,628	10,413	16,718
2019 Population by Sex			
Males	2,389	9,642	15,683
Females	2,665	10,746	17,214
2024 Population by Sex			
Males	2,442	9,952	16,235
Females	2,691	10,974	17,669

Source: U.S. Census Bureau, Census 2010 Summary File 1. Esri forecasts for 2019 and 2024 Esri converted Census 2000 data into 2010 geography.



Market Profile

Lancaster Lat/Log Radi
900-920 12th St, Lancaster, South Carolina, 29720
Rings: 1, 3, 5 mile radii

Prepared by Esri
Latitude: 34.71237
Longitude: -80.77591

	1 mile	3 miles	5 miles
2010 Population by Race/Ethnicity			
Total	4,961	19,658	31,808
White Alone	38.9%	52.4%	58.7%
Black Alone	53.9%	40.0%	35.2%
American Indian Alone	0.3%	0.2%	0.2%
Asian Alone	0.5%	0.6%	0.5%
Pacific Islander Alone	0.0%	0.0%	0.0%
Some Other Race Alone	4.6%	5.2%	4.1%
Two or More Races	1.8%	1.5%	1.3%
Hispanic Origin	7.3%	7.6%	6.0%
Diversity Index	61.8	62.6	58.4
2019 Population by Race/Ethnicity			
Total	5,054	20,388	32,897
White Alone	33.6%	47.1%	53.2%
Black Alone	56.3%	42.2%	38.1%
American Indian Alone	0.3%	0.2%	0.2%
Asian Alone	0.4%	0.5%	0.4%
Pacific Islander Alone	0.0%	0.0%	0.0%
Some Other Race Alone	6.7%	7.7%	6.1%
Two or More Races	2.7%	2.3%	2.1%
Hispanic Origin	10.0%	10.5%	8.4%
Diversity Index	64.7	67.5	63.8
2024 Population by Race/Ethnicity			
Total	5,133	20,925	33,904
White Alone	31.9%	45.4%	51.5%
Black Alone	56.8%	42.7%	38.8%
American Indian Alone	0.3%	0.2%	0.2%
Asian Alone	0.4%	0.5%	0.4%
Pacific Islander Alone	0.0%	0.0%	0.0%
Some Other Race Alone	7.6%	8.7%	6.9%
Two or More Races	3.0%	2.5%	2.3%
Hispanic Origin	11.0%	11.6%	9.3%
Diversity Index	65.9	69.2	65.5
2010 Population by Relationship and Household Type			
Total	4,960	19,658	31,808
In Households	98.9%	98.2%	98.4%
In Family Households	80.6%	82.1%	83.9%
Householder	23.9%	25.7%	26.8%
Spouse	9.8%	14.2%	16.5%
Child	36.8%	34.2%	33.4%
Other relative	5.8%	4.9%	4.4%
Nonrelative	4.2%	3.2%	2.8%
In Nonfamily Households	18.3%	16.1%	14.5%
In Group Quarters	1.1%	1.8%	1.6%
Institutionalized Population	0.5%	1.4%	1.3%
Noninstitutionalized Population	0.5%	0.4%	0.3%

Data Note: Persons of Hispanic Origin may be of any race. The Diversity Index measures the probability that two people from the same area will be from different race/ethnic groups.

Source: U.S. Census Bureau, Census 2010 Summary File 1. Esri forecasts for 2019 and 2024 Esri converted Census 2000 data into 2010 geography.



Market Profile

Lancaster Lat/Log Radi
900-920 12th St, Lancaster, South Carolina, 29720
Rings: 1, 3, 5 mile radii

Prepared by Esri
Latitude: 34.71237
Longitude: -80.77591

	1 mile	3 miles	5 miles
2019 Population 25+ by Educational Attainment			
Total	3,230	13,697	22,808
Less than 9th Grade	11.4%	6.9%	6.0%
9th - 12th Grade, No Diploma	21.1%	14.4%	13.1%
High School Graduate	25.3%	32.6%	33.5%
GED/Alternative Credential	5.6%	5.8%	6.1%
Some College, No Degree	20.7%	17.7%	18.2%
Associate Degree	7.1%	9.0%	8.9%
Bachelor's Degree	4.1%	8.0%	8.9%
Graduate/Professional Degree	4.8%	5.6%	5.4%
2019 Population 15+ by Marital Status			
Total	3,840	16,039	26,418
Never Married	46.0%	37.6%	36.1%
Married	29.0%	39.7%	43.1%
Widowed	9.3%	10.0%	9.3%
Divorced	15.8%	12.7%	11.5%
2019 Civilian Population 16+ in Labor Force			
Civilian Employed	88.1%	91.9%	93.6%
Civilian Unemployed (Unemployment Rate)	11.9%	8.1%	6.4%
2019 Employed Population 16+ by Industry			
Total	1,769	7,830	13,314
Agriculture/Mining	0.1%	0.2%	0.3%
Construction	3.4%	5.5%	7.0%
Manufacturing	18.8%	20.2%	19.2%
Wholesale Trade	4.3%	3.5%	3.1%
Retail Trade	15.2%	12.9%	12.8%
Transportation/Utilities	6.2%	5.7%	5.6%
Information	3.4%	2.1%	1.8%
Finance/Insurance/Real Estate	2.2%	4.5%	5.8%
Services	45.1%	41.0%	40.0%
Public Administration	1.2%	4.4%	4.6%
2019 Employed Population 16+ by Occupation			
Total	1,770	7,830	13,312
White Collar	39.5%	44.6%	47.4%
Management/Business/Financial	2.2%	7.1%	8.3%
Professional	10.2%	11.7%	13.5%
Sales	12.0%	11.7%	10.8%
Administrative Support	15.0%	14.1%	14.8%
Services	23.8%	20.1%	19.8%
Blue Collar	36.8%	35.3%	32.8%
Farming/Forestry/Fishing	1.1%	0.3%	0.2%
Construction/Extraction	2.2%	3.7%	5.2%
Installation/Maintenance/Repair	6.4%	6.3%	5.5%
Production	14.1%	15.4%	13.5%
Transportation/Material Moving	13.0%	9.5%	8.3%
2010 Population By Urban/ Rural Status			
Total Population	4,960	19,658	31,808
Population Inside Urbanized Area	0.0%	0.0%	0.0%
Population Inside Urbanized Cluster	99.9%	87.9%	73.3%
Rural Population	0.1%	12.1%	26.7%

Source: U.S. Census Bureau, Census 2010 Summary File 1. Esri forecasts for 2019 and 2024 Esri converted Census 2000 data into 2010 geography.



Market Profile

Lancaster Lat/Log Radi
900-920 12th St, Lancaster, South Carolina, 29720
Rings: 1, 3, 5 mile radii

Prepared by Esri
Latitude: 34.71237
Longitude: -80.77591

	1 mile	3 miles	5 miles
2010 Households by Type			
Total	1,977	7,776	12,408
Households with 1 Person	32.8%	29.0%	26.6%
Households with 2+ People	67.2%	71.0%	73.4%
Family Households	61.1%	65.7%	68.7%
Husband-wife Families	25.0%	36.4%	42.5%
With Related Children	10.9%	14.8%	17.1%
Other Family (No Spouse Present)	36.0%	29.3%	26.2%
Other Family with Male Householder	6.6%	5.7%	5.2%
With Related Children	3.5%	2.9%	2.7%
Other Family with Female Householder	29.4%	23.6%	21.0%
With Related Children	20.6%	16.4%	14.1%
Nonfamily Households	6.1%	5.4%	4.7%
All Households with Children	35.8%	34.7%	34.5%
Multigenerational Households	7.3%	6.2%	5.8%
Unmarried Partner Households	10.1%	8.0%	7.3%
Male-female	9.2%	7.2%	6.6%
Same-sex	0.9%	0.8%	0.7%
2010 Households by Size			
Total	1,979	7,776	12,409
1 Person Household	32.8%	29.0%	26.6%
2 Person Household	27.2%	31.6%	33.1%
3 Person Household	16.0%	16.7%	17.5%
4 Person Household	12.1%	12.5%	13.2%
5 Person Household	6.1%	5.9%	5.9%
6 Person Household	3.6%	2.6%	2.2%
7 + Person Household	2.3%	1.7%	1.5%
2010 Households by Tenure and Mortgage Status			
Total	1,977	7,776	12,408
Owner Occupied	38.3%	53.4%	63.3%
Owned with a Mortgage/Loan	22.5%	33.5%	41.0%
Owned Free and Clear	15.8%	19.9%	22.3%
Renter Occupied	61.7%	46.6%	36.7%
2010 Housing Units By Urban/ Rural Status			
Total Housing Units	2,370	8,778	13,713
Housing Units Inside Urbanized Area	0.0%	0.0%	0.0%
Housing Units Inside Urbanized Cluster	99.8%	88.1%	74.2%
Rural Housing Units	0.2%	11.9%	25.8%

Data Note: Households with children include any households with people under age 18, related or not. Multigenerational households are families with 3 or more parent-child relationships. Unmarried partner households are usually classified as nonfamily households unless there is another member of the household related to the householder. Multigenerational and unmarried partner households are reported only to the tract level. Esri estimated block group data, which is used to estimate polygons or non-standard geography.

Source: U.S. Census Bureau, Census 2010 Summary File 1. Esri forecasts for 2019 and 2024 Esri converted Census 2000 data into 2010 geography.



Market Profile

Lancaster Lat/Log Radi
900-920 12th St, Lancaster, South Carolina, 29720
Rings: 1, 3, 5 mile radii

Prepared by Esri
Latitude: 34.71237
Longitude: -80.77591

	1 mile	3 miles	5 miles
Top 3 Tapestry Segments			
1.	Hardscrabble Road (8G)	Small Town Simplicity (12C)	Southern Satellites (10A)
2.	City Commons (11E)	Modest Income Homes (12D)	Small Town Simplicity (12C)
3.	Modest Income Homes (12D)	Down the Road (10D)	Heartland Communities (6F)
2019 Consumer Spending			
Apparel & Services: Total \$	\$2,044,337	\$10,619,051	\$18,266,836
Average Spent	\$1,029.89	\$1,325.56	\$1,430.90
Spending Potential Index	48	62	67
Education: Total \$	\$1,363,139	\$7,077,728	\$12,233,153
Average Spent	\$686.72	\$883.50	\$958.26
Spending Potential Index	43	55	60
Entertainment/Recreation: Total \$	\$3,013,249	\$16,446,265	\$28,774,013
Average Spent	\$1,518.01	\$2,052.96	\$2,253.96
Spending Potential Index	46	63	69
Food at Home: Total \$	\$5,099,045	\$26,962,344	\$46,638,250
Average Spent	\$2,568.79	\$3,365.67	\$3,653.32
Spending Potential Index	50	65	71
Food Away from Home: Total \$	\$3,438,920	\$18,163,059	\$31,498,819
Average Spent	\$1,732.45	\$2,267.26	\$2,467.40
Spending Potential Index	47	62	67
Health Care: Total \$	\$5,707,696	\$31,428,358	\$55,234,167
Average Spent	\$2,875.41	\$3,923.15	\$4,326.66
Spending Potential Index	48	66	73
HH Furnishings & Equipment: Total \$	\$1,932,223	\$10,459,834	\$18,183,907
Average Spent	\$973.41	\$1,305.68	\$1,424.40
Spending Potential Index	46	61	67
Personal Care Products & Services: Total \$	\$814,335	\$4,358,904	\$7,570,566
Average Spent	\$410.24	\$544.11	\$593.03
Spending Potential Index	46	61	67
Shelter: Total \$	\$16,909,722	\$87,454,482	\$148,545,355
Average Spent	\$8,518.75	\$10,916.80	\$11,636.01
Spending Potential Index	46	59	63
Support Payments/Cash Contributions/Gifts in Kind: Total \$	\$2,222,218	\$12,379,833	\$21,873,600
Average Spent	\$1,119.51	\$1,545.35	\$1,713.43
Spending Potential Index	45	62	69
Travel: Total \$	\$1,809,593	\$10,078,800	\$17,676,293
Average Spent	\$911.63	\$1,258.12	\$1,384.64
Spending Potential Index	41	56	62
Vehicle Maintenance & Repairs: Total \$	\$1,096,485	\$5,869,609	\$10,134,239
Average Spent	\$552.39	\$732.69	\$793.85
Spending Potential Index	48	64	69

Data Note: Consumer spending shows the amount spent on a variety of goods and services by households that reside in the area. Expenditures are shown by broad budget categories that are not mutually exclusive. Consumer spending does not equal business revenue. Total and Average Amount Spent Per Household represent annual figures. The Spending Potential Index represents the amount spent in the area relative to a national average of 100.

Source: Consumer Spending data are derived from the 2016 and 2017 Consumer Expenditure Surveys, Bureau of Labor Statistics. Esri.

Source: U.S. Census Bureau, Census 2010 Summary File 1. Esri forecasts for 2019 and 2024 Esri converted Census 2000 data into 2010 geography.

Appendix D: Retail Leakage Analysis of 1, 3, and 5-Mile Radii of the Site

(on the following pages)

DRAFT



Retail MarketPlace Profile

Lancaster Lat/Log Radi
900-920 12th St, Lancaster, South Carolina, 29720
Ring: 1 mile radius

Prepared by Esri
Latitude: 34.71237
Longitude: -80.77591

Summary Demographics

2019 Population	5,054
2019 Households	1,985
2019 Median Disposable Income	\$20,949
2019 Per Capita Income	\$15,356

	NAICS	Demand (Retail Potential)	Supply (Retail Sales)	Retail Gap	Leakage/Surplus Factor	Number of Businesses
2017 Industry Summary						
Total Retail Trade and Food & Drink	44-45,722	\$33,077,001	\$74,393,327	-\$41,316,326	-38.4	70
Total Retail Trade	44-45	\$29,997,025	\$68,156,878	-\$38,159,853	-38.9	56
Total Food & Drink	722	\$3,079,977	\$6,236,449	-\$3,156,472	-33.9	14
	NAICS	Demand (Retail Potential)	Supply (Retail Sales)	Retail Gap	Leakage/Surplus Factor	Number of Businesses
2017 Industry Group						
Motor Vehicle & Parts Dealers	441	\$6,553,989	\$7,419,062	-\$865,073	-6.2	11
Automobile Dealers	4411	\$5,333,298	\$5,705,201	-\$371,903	-3.4	7
Other Motor Vehicle Dealers	4412	\$561,640	\$0	\$561,640	100.0	0
Auto Parts, Accessories & Tire Stores	4413	\$659,052	\$1,383,595	-\$724,543	-35.5	4
Furniture & Home Furnishings Stores	442	\$1,013,540	\$2,622,531	-\$1,608,991	-44.3	2
Furniture Stores	4421	\$677,115	\$1,945,645	-\$1,268,530	-48.4	1
Home Furnishings Stores	4422	\$336,425	\$676,885	-\$340,460	-33.6	1
Electronics & Appliance Stores	443	\$839,213	\$3,306,008	-\$2,466,795	-59.5	1
Bldg Materials, Garden Equip. & Supply Stores	444	\$1,838,567	\$9,037,603	-\$7,199,036	-66.2	4
Bldg Material & Supplies Dealers	4441	\$1,746,086	\$8,965,744	-\$7,219,658	-67.4	4
Lawn & Garden Equip & Supply Stores	4442	\$92,482	\$0	\$92,482	100.0	0
Food & Beverage Stores	445	\$5,478,032	\$10,221,724	-\$4,743,692	-30.2	7
Grocery Stores	4451	\$5,030,599	\$9,567,011	-\$4,536,412	-31.1	5
Specialty Food Stores	4452	\$193,575	\$88,479	\$105,096	37.3	1
Beer, Wine & Liquor Stores	4453	\$253,859	\$566,235	-\$312,376	-38.1	1
Health & Personal Care Stores	446,4461	\$1,945,223	\$3,761,270	-\$1,816,047	-31.8	5
Gasoline Stations	447,4471	\$3,691,862	\$19,678,442	-\$15,986,580	-68.4	6
Clothing & Clothing Accessories Stores	448	\$1,269,060	\$2,205,033	-\$935,973	-26.9	5
Clothing Stores	4481	\$841,226	\$945,351	-\$104,125	-5.8	3
Shoe Stores	4482	\$205,142	\$0	\$205,142	100.0	0
Jewelry, Luggage & Leather Goods Stores	4483	\$222,691	\$738,351	-\$515,660	-53.7	1
Sporting Goods, Hobby, Book & Music Stores	451	\$801,451	\$349,089	\$452,362	39.3	1
Sporting Goods/Hobby/Musical Instr Stores	4511	\$674,569	\$349,089	\$325,480	31.8	1
Book, Periodical & Music Stores	4512	\$126,881	\$0	\$126,881	100.0	0
General Merchandise Stores	452	\$4,943,747	\$7,584,238	-\$2,640,491	-21.1	4
Department Stores Excluding Leased Depts.	4521	\$3,608,144	\$5,773,277	-\$2,165,133	-23.1	1
Other General Merchandise Stores	4529	\$1,335,602	\$1,810,961	-\$475,359	-15.1	2
Miscellaneous Store Retailers	453	\$1,157,455	\$1,971,878	-\$814,423	-26.0	9
Florists	4531	\$34,486	\$430,629	-\$396,143	-85.2	3
Office Supplies, Stationery & Gift Stores	4532	\$235,453	\$271,532	-\$36,079	-7.1	1
Used Merchandise Stores	4533	\$140,417	\$716,347	-\$575,930	-67.2	3
Other Miscellaneous Store Retailers	4539	\$747,098	\$553,371	\$193,727	14.9	2
Nonstore Retailers	454	\$464,886	\$0	\$464,886	100.0	0
Electronic Shopping & Mail-Order Houses	4541	\$320,472	\$0	\$320,472	100.0	0
Vending Machine Operators	4542	\$19,392	\$0	\$19,392	100.0	0
Direct Selling Establishments	4543	\$125,022	\$0	\$125,022	100.0	0
Food Services & Drinking Places	722	\$3,079,977	\$6,236,449	-\$3,156,472	-33.9	14
Special Food Services	7223	\$43,194	\$32,208	\$10,986	14.6	1
Drinking Places - Alcoholic Beverages	7224	\$191,102	\$0	\$191,102	100.0	0
Restaurants/Other Eating Places	7225	\$2,845,681	\$6,204,241	-\$3,358,560	-37.1	13

Data Note: Supply (retail sales) estimates sales to consumers by establishments. Sales to businesses are excluded. Demand (retail potential) estimates the expected amount spent by consumers at retail establishments. Supply and demand estimates are in current dollars. The Leakage/Surplus Factor presents a snapshot of retail opportunity. This is a measure of the relationship between supply and demand that ranges from +100 (total leakage) to -100 (total surplus). A positive value represents 'leakage' of retail opportunity outside the trade area. A negative value represents a surplus of retail sales, a market where customers are drawn in from outside the trade area. The Retail Gap represents the difference between Retail Potential and Retail Sales. 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 four industry groups within the Food Services & Drinking Establishments subsector. For more information on the Retail MarketPlace data, please click the link below to view the Methodology Statement.
<http://www.esri.com/library/whitepapers/pdfs/esri-data-retail-marketplace.pdf>

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Retail MarketPlace Profile

Lancaster Lat/Log Radi
900-920 12th St, Lancaster, South Carolina, 29720
Ring: 3 mile radius

Prepared by Esri
Latitude: 34.71237
Longitude: -80.77591

Summary Demographics

2019 Population	20,388
2019 Households	8,011
2019 Median Disposable Income	\$29,185
2019 Per Capita Income	\$20,499

2017 Industry Summary

	NAICS	Demand (Retail Potential)	Supply (Retail Sales)	Retail Gap	Leakage/Surplus Factor	Number of Businesses
Total Retail Trade and Food & Drink	44-45,722	\$192,021,126	\$411,969,172	-\$219,948,046	-36.4	252
Total Retail Trade	44-45	\$174,346,288	\$378,655,492	-\$204,309,204	-36.9	193
Total Food & Drink	722	\$17,674,838	\$33,313,680	-\$15,638,842	-30.7	59

2017 Industry Group

	NAICS	Demand (Retail Potential)	Supply (Retail Sales)	Retail Gap	Leakage/Surplus Factor	Number of Businesses
Motor Vehicle & Parts Dealers	441	\$38,512,411	\$64,189,588	-\$25,677,177	-25.0	42
Automobile Dealers	4411	\$31,215,374	\$53,483,383	-\$22,268,009	-26.3	23
Other Motor Vehicle Dealers	4412	\$3,460,831	\$2,223,857	\$1,236,974	21.8	2
Auto Parts, Accessories & Tire Stores	4413	\$3,836,206	\$8,482,348	-\$4,646,142	-37.7	17
Furniture & Home Furnishings Stores	442	\$5,841,977	\$6,565,778	-\$723,801	-5.8	5
Furniture Stores	4421	\$3,777,186	\$5,585,458	-\$1,808,272	-19.3	4
Home Furnishings Stores	4422	\$2,064,791	\$980,320	\$1,084,471	35.6	1
Electronics & Appliance Stores	443	\$4,759,699	\$6,865,339	-\$2,105,640	-18.1	6
Bldg Materials, Garden Equip. & Supply Stores	444	\$12,109,902	\$36,422,662	-\$24,312,760	-50.1	16
Bldg Material & Supplies Dealers	4441	\$11,492,079	\$36,028,644	-\$24,536,565	-51.6	14
Lawn & Garden Equip & Supply Stores	4442	\$617,823	\$394,018	\$223,805	22.1	2
Food & Beverage Stores	445	\$30,874,091	\$78,731,798	-\$47,857,707	-43.7	26
Grocery Stores	4451	\$28,314,439	\$75,091,940	-\$46,777,501	-45.2	17
Specialty Food Stores	4452	\$1,082,894	\$569,521	\$513,373	31.1	2
Beer, Wine & Liquor Stores	4453	\$1,476,757	\$3,070,337	-\$1,593,580	-35.0	7
Health & Personal Care Stores	446,4461	\$11,487,060	\$38,399,370	-\$26,912,310	-53.9	21
Gasoline Stations	447,4471	\$20,984,505	\$60,616,335	-\$39,631,830	-48.6	23
Clothing & Clothing Accessories Stores	448	\$7,272,811	\$6,678,574	\$594,237	4.3	13
Clothing Stores	4481	\$4,796,036	\$2,546,784	\$2,249,252	30.6	7
Shoe Stores	4482	\$1,159,874	\$2,165,052	-\$1,005,178	-30.2	3
Jewelry, Luggage & Leather Goods Stores	4483	\$1,316,901	\$1,966,739	-\$649,838	-19.8	3
Sporting Goods, Hobby, Book & Music Stores	451	\$4,662,170	\$3,454,574	\$1,207,596	14.9	8
Sporting Goods/Hobby/Musical Instr Stores	4511	\$3,971,782	\$3,129,504	\$842,278	11.9	7
Book, Periodical & Music Stores	4512	\$690,388	\$325,070	\$365,318	36.0	1
General Merchandise Stores	452	\$28,287,083	\$68,174,972	-\$39,887,889	-41.4	11
Department Stores Excluding Leased Depts.	4521	\$20,689,623	\$60,664,234	-\$39,974,611	-49.1	5
Other General Merchandise Stores	4529	\$7,597,461	\$7,510,738	\$86,723	0.6	6
Miscellaneous Store Retailers	453	\$6,765,668	\$6,131,671	\$633,997	4.9	21
Florists	4531	\$227,136	\$494,873	-\$267,737	-37.1	4
Office Supplies, Stationery & Gift Stores	4532	\$1,375,385	\$618,308	\$757,077	38.0	2
Used Merchandise Stores	4533	\$766,824	\$2,447,410	-\$1,680,586	-52.3	7
Other Miscellaneous Store Retailers	4539	\$4,396,323	\$2,571,080	\$1,825,243	26.2	8
Nonstore Retailers	454	\$2,788,910	\$2,424,833	\$364,077	7.0	3
Electronic Shopping & Mail-Order Houses	4541	\$1,863,198	\$0	\$1,863,198	100.0	0
Vending Machine Operators	4542	\$108,686	\$72,440	\$36,246	20.0	1
Direct Selling Establishments	4543	\$817,027	\$2,352,393	-\$1,535,366	-48.4	2
Food Services & Drinking Places	722	\$17,674,838	\$33,313,680	-\$15,638,842	-30.7	59
Special Food Services	7223	\$250,505	\$300,873	-\$50,368	-9.1	3
Drinking Places - Alcoholic Beverages	7224	\$1,122,155	\$186,228	\$935,927	71.5	1
Restaurants/Other Eating Places	7225	\$16,302,179	\$32,826,579	-\$16,524,400	-33.6	55

Data Note: Supply (retail sales) estimates sales to consumers by establishments. Sales to businesses are excluded. Demand (retail potential) estimates the expected amount spent by consumers at retail establishments. Supply and demand estimates are in current dollars. The Leakage/Surplus Factor presents a snapshot of retail opportunity. This is a measure of the relationship between supply and demand that ranges from +100 (total leakage) to -100 (total surplus). A positive value represents 'leakage' of retail opportunity outside the trade area. A negative value represents a surplus of retail sales, a market where customers are drawn in from outside the trade area. The Retail Gap represents the difference between Retail Potential and Retail Sales. 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 four industry groups within the Food Services & Drinking Establishments subsector. For more information on the Retail MarketPlace data, please click the link below to view the Methodology Statement.
<http://www.esri.com/library/whitepapers/pdfs/esri-data-retail-marketplace.pdf>

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Retail MarketPlace Profile

Lancaster Lat/Log Radi
900-920 12th St, Lancaster, South Carolina, 29720
Ring: 5 mile radius

Prepared by Esri
Latitude: 34.71237
Longitude: -80.77591

Summary Demographics						
2019 Population						32,897
2019 Households						12,766
2019 Median Disposable Income						\$33,914
2019 Per Capita Income						\$22,400
2017 Industry Summary	NAICS	Demand (Retail Potential)	Supply (Retail Sales)	Retail Gap	Leakage/Surplus Factor	Number of Businesses
Total Retail Trade and Food & Drink	44-45,722	\$330,379,007	\$477,029,954	-\$146,650,947	-18.2	294
Total Retail Trade	44-45	\$300,230,352	\$440,481,653	-\$140,251,301	-18.9	227
Total Food & Drink	722	\$30,148,655	\$36,548,301	-\$6,399,646	-9.6	67
2017 Industry Group	NAICS	Demand (Retail Potential)	Supply (Retail Sales)	Retail Gap	Leakage/Surplus Factor	Number of Businesses
Motor Vehicle & Parts Dealers	441	\$67,040,034	\$72,153,125	-\$5,113,091	-3.7	48
Automobile Dealers	4411	\$54,378,021	\$59,989,174	-\$5,611,153	-4.9	25
Other Motor Vehicle Dealers	4412	\$6,087,202	\$2,420,592	\$3,666,610	43.1	3
Auto Parts, Accessories & Tire Stores	4413	\$6,574,811	\$9,743,360	-\$3,168,549	-19.4	21
Furniture & Home Furnishings Stores	442	\$9,998,572	\$6,667,895	\$3,330,677	20.0	6
Furniture Stores	4421	\$6,422,559	\$5,606,611	\$815,948	6.8	4
Home Furnishings Stores	4422	\$3,576,013	\$1,061,284	\$2,514,729	54.2	2
Electronics & Appliance Stores	443	\$8,049,548	\$7,509,880	\$539,668	3.5	7
Bldg Materials, Garden Equip. & Supply Stores	444	\$21,567,899	\$40,967,776	-\$19,399,877	-31.0	21
Bldg Material & Supplies Dealers	4441	\$20,475,913	\$40,559,156	-\$20,083,243	-32.9	19
Lawn & Garden Equip & Supply Stores	4442	\$1,091,986	\$408,620	\$683,366	45.5	2
Food & Beverage Stores	445	\$52,556,406	\$90,380,121	-\$37,823,715	-26.5	34
Grocery Stores	4451	\$48,218,952	\$85,303,795	-\$37,084,843	-27.8	22
Specialty Food Stores	4452	\$1,840,400	\$900,382	\$940,018	34.3	3
Beer, Wine & Liquor Stores	4453	\$2,497,055	\$4,175,944	-\$1,678,889	-25.2	9
Health & Personal Care Stores	446,4461	\$19,829,250	\$39,736,496	-\$19,907,246	-33.4	21
Gasoline Stations	447,4471	\$36,104,800	\$75,821,057	-\$39,716,257	-35.5	29
Clothing & Clothing Accessories Stores	448	\$12,360,795	\$6,924,254	\$5,436,541	28.2	14
Clothing Stores	4481	\$8,155,345	\$2,566,346	\$5,588,999	52.1	7
Shoe Stores	4482	\$1,981,436	\$2,227,033	-\$245,597	-5.8	3
Jewelry, Luggage & Leather Goods Stores	4483	\$2,224,014	\$2,130,875	\$93,139	2.1	4
Sporting Goods, Hobby, Book & Music Stores	451	\$7,961,548	\$3,976,052	\$3,985,496	33.4	11
Sporting Goods/Hobby/Musical Instr Stores	4511	\$6,807,291	\$3,630,379	\$3,176,912	30.4	10
Book, Periodical & Music Stores	4512	\$1,154,257	\$345,673	\$808,584	53.9	1
General Merchandise Stores	452	\$48,305,898	\$87,417,751	-\$39,111,853	-28.8	12
Department Stores Excluding Leased Depts.	4521	\$35,309,964	\$79,293,045	-\$43,983,081	-38.4	5
Other General Merchandise Stores	4529	\$12,995,934	\$8,124,706	\$4,871,228	23.1	7
Miscellaneous Store Retailers	453	\$11,676,181	\$6,317,274	\$5,358,907	29.8	22
Florists	4531	\$393,690	\$494,873	-\$101,183	-11.4	4
Office Supplies, Stationery & Gift Stores	4532	\$2,352,525	\$618,308	\$1,734,217	58.4	2
Used Merchandise Stores	4533	\$1,291,718	\$2,615,295	-\$1,323,577	-33.9	8
Other Miscellaneous Store Retailers	4539	\$7,638,248	\$2,588,798	\$5,049,450	49.4	8
Nonstore Retailers	454	\$4,779,422	\$2,609,972	\$2,169,450	29.4	4
Electronic Shopping & Mail-Order Houses	4541	\$3,170,857	\$0	\$3,170,857	100.0	0
Vending Machine Operators	4542	\$184,809	\$77,031	\$107,778	41.2	1
Direct Selling Establishments	4543	\$1,423,757	\$2,532,941	-\$1,109,184	-28.0	3
Food Services & Drinking Places	722	\$30,148,655	\$36,548,301	-\$6,399,646	-9.6	67
Special Food Services	7223	\$430,556	\$340,152	\$90,404	11.7	4
Drinking Places - Alcoholic Beverages	7224	\$1,901,674	\$186,228	\$1,715,446	82.2	1
Restaurants/Other Eating Places	7225	\$27,816,426	\$36,021,922	-\$8,205,496	-12.9	62

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Study Partners

Red Rose City Development Corporation

The Red Rose City Development Corporation, Inc. (RRCDC) is made up of five volunteer board members, the City of Lancaster's City Administrator, and the City of Lancaster's Finance Director. RRCDC's overall mission is to create employment, combat deterioration of commercial areas, to attract and retain new businesses and industries, and to implement sustainable community and economic development. <https://www.lancastercitysc.com/red-rose-city-development-corp/>



Lancaster, SC, is a charming small town (pop. 9,083) on US 521 in north central South Carolina near Charlotte, NC. The city is home to University of South Carolina – Lancaster which has a performing arts series and growing Native American art collection. Lancaster is a Main Street America affiliate. The city has been investing in downtown revitalization including

streetscape. Recreational opportunities abound in and nearby to Lancaster - golf courses, Forty Acre Rock Heritage Preserve, the Catawba River, and several state parks.

<https://www.lancastercitysc.com/>



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