



RETAIL MARKET ANALYSIS

POMEROY & MIDDLEPORT, OHIO

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EXTENSION

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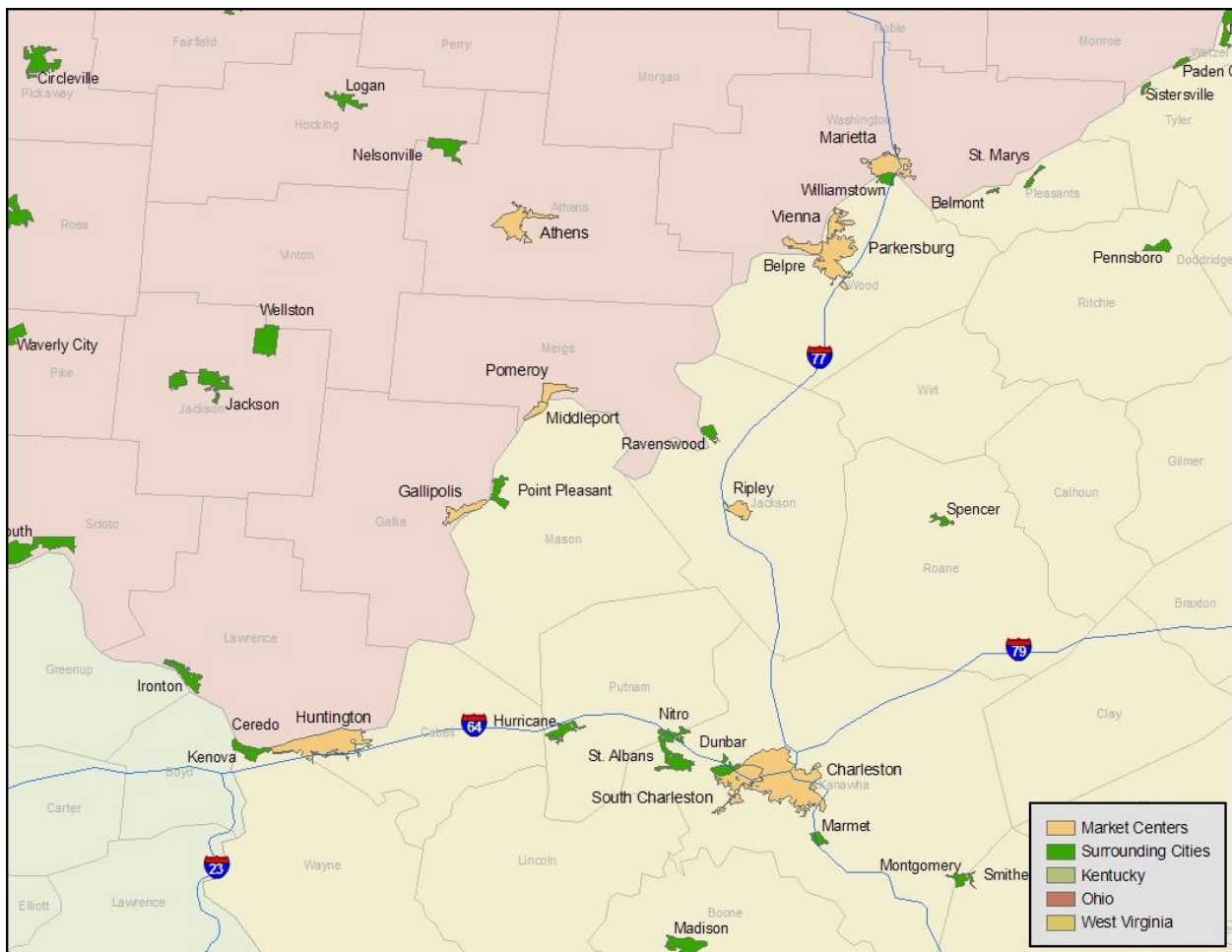
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Preface

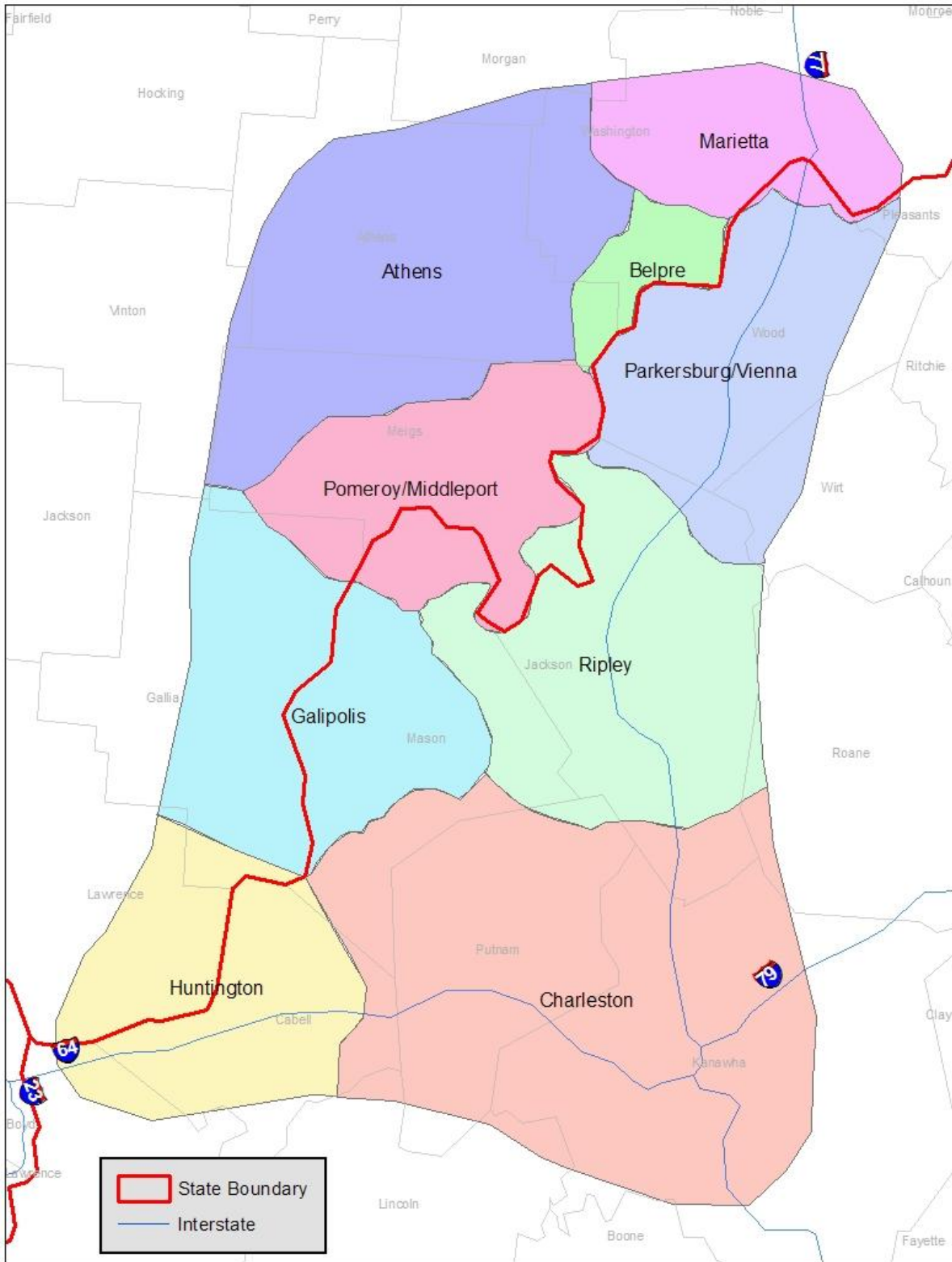
The following retail market analysis for Pomeroy and Middleport (Ohio) compares the retail economies of these two communities to the retail economy of the broader market region (center of Map 1). This regional approach enables us to better understand the retail economies of Pomeroy and Middleport. Recognizing that the residents of Pomeroy and Middleport purchase retail goods in retail centers other than Pomeroy and Middleport, a Pomeroy/Middleport market region was developed which extends north into Athens, Morgan, and Washington Counties and south into several West Virginia counties. Map 2 shows the entire market region, the study cities and their competing market centers.

Competing Market Centers were identified by the task force, and for purposes of this report, are defined as population centers and retail centers with a population greater than 2,000. The area around the center from which that center “pulls” its customers is referred to as the retail Market Area. The larger Market Region is comprised of Market Areas and Market Centers which compete with Pomeroy and Middleport.

In addition to this analysis, retail sales are examined in Meigs County proper, where the two study communities are located, to illustrate the retail economy from a county perspective.



Map 1: Pomeroy/Middleport Area Reference Map



Map 2: Competing Market Areas of the Pomeroy/Middleport Market Region

I. Introduction

Retail market analysis is a tool for identifying retail market trends within a local community. While the analysis focuses specifically on the performance of local retail markets, information on the broader demographic and economic trends within the region is critical to understanding current and future changes in these retail markets. Changes in population, the age and income distributions of the population, and the number of people employed by different industrial sectors will change the demand for retail goods within a local community and therefore are important factors to be considered in an analysis of retail market trends.

Of primary importance is an understanding of the pattern of retail spending within the local community relative to spending in neighboring areas. Retail sales leakages could reflect that the local demand for a particular product is not being met within the local community, whereas retail sales surpluses may indicate that the local community serves a regional market that pulls consumers in from outside the local area to purchase particular retail items. Estimation of retail surpluses and leakages by specific retail sectors provides a means to identify the relative strengths and weaknesses of an area's retail markets and thereby inform economic development strategies for local communities. A retail market analysis is not a detailed plan of action, but rather provides facts and analysis for input into the community's decision-making process about future economic development.¹

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Acknowledgements

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¹ This report uses a number of project-specific terms, including market area, potential sales and retail sales surplus and leakage. For definitions of these terms please see Section VII.

II. Demographic and Economic Trends

Consumer characteristics influence consumers' lifestyles and their demand for different retail goods. For example, characteristics such as age, income, and family structure provide insights on consumers' stage of life and therefore into local shopping habits. For example, young, single people are more focused on non-durable goods such as clothing and entertainment, while married couples with young children are focused more on durable goods, such as furniture and home furnishings. Generally speaking, population and income are the two major factors that drive retail demand/purchasing power within a market area. Income is highly correlated with age and education. Furthermore, the movement of people from places of work to residences greatly affects the probability of "out shopping", or in other words, the likelihood that residents shop outside of their market area. Finally, Tables 1, 2 and 3 and Maps 3 and 4 detail the population, income, and housing trends in the Pomeroy/Middleport Market Area and the Market Region. The highlights of these trends, in addition to a comparison of locales, are summarized below:

POPULATION (TABLE 1) (MAPS 3-5):

- Estimated 2006 population density shows the most densely settled areas in the market region were located along the Ohio River and in Charleston, WV.
- Charleston was also the area that has experienced the greatest population declines in the market region between 1990 and 2000. The Pomeroy/Middleport market area also experienced a decline during this period.
- More than half of the Market Areas in the Market Region are projected to have population decreases including Pomeroy/Middleport. Projected strong growth in the Ripley Market Area and moderate population growth in the Athens Market Area should help to balance projected population losses in the remainder of the Market Region, resulting in only slightly negative growth for the overall Market Region from 2000-2011.

HOUSING CHARACTERISTICS (TABLE 1):

- Median home values in the Pomeroy/Middleport Market Area are also expected to rise at higher rate (18%) than that of the entire Market Region (13%) over the 2006-2011 time period. This is a good sign for retail development.
- The Pomeroy/Middleport Market Area has slightly higher home ownership rates (71% vs 67%) than the rest of the Market Region on average. High rates of home ownership are a positive force in increasing retail health because they promote community stability and loyalty between customers and local retailers.
- After strong growth in home ownership over the past 5 years, both the Pomeroy/Middleport Market Area and the entire Market Region are projected to decrease slightly (approximately 1%) in home ownership (at similar rates). Despite the decrease, the Pomeroy/Middleport Market Area will still have a higher rate of home ownership compared to the Market Region.

INCOME (TABLE 1):

- Average household income (\$32,265) and the per capita income (\$16,929) in the Pomeroy/Middleport Market Area was 20% less than the average household income of the Market Region (\$37,092). The average household income of the Pomeroy/Middleport Market Area is projected to grow at a rate roughly equal to inflation (3.2%) and slightly lower than that of the Market Region (3.4%).
- While the Pomeroy/Middleport Market Area had a similar percentage of individuals earning middle incomes compared to the Market Region, they currently and are projected to have a significantly higher percentage of individuals (22% vs 18%) earning less than \$15,000 a year.

LIFE CYCLE (TABLE 2):

The life cycle describes how people's consuming behavior evolves as their life style evolves from bachelorhood, to marriage and family, to empty nesting. As mentioned earlier, the stage at which people are in the life cycle greatly affects the type and amount of retail goods that they purchase. For instance, newly married couples buy more home improvement items, and senior citizens purchase more health-related goods while unmarried singles purchase less durable goods.

- The average age of residents in the Pomeroy/Middleport Market Area was slightly higher (41.7 years) than the average age of residents of the overall Market Region (41.4 years). The average age of Pomeroy/Middleport Market Area residents is increasing at a rate faster than the population of the Market Region with a projected average age gap of .8 years by 2011.
- The Pomeroy/Middleport Market Area had below average percentages of young adults (less than 35 years of age) and above average percentages of middle age individuals, senior citizens (35 years of age and older) and families compared to the Market Region (71% vs 67%).

EMPLOYMENT (TABLE 3):

- The Pomeroy/Middleport Market Area had an unemployment rate (6%) higher than that of the overall Market Region (4%).
- The Pomeroy/Middleport Market Area employs more in the industries of Agriculture/Mining (8%) than compared to the Market Region in this same industrial sector (2%). These sectors, as a whole in Ohio, are declining, while the Service sector is the fastest growing.
- The Market Region as a whole had a higher percentage of residents employed in the Service sector (45%) than residents in the Pomeroy/Middleport Market Area (41%).

EDUCATIONAL ATTAINMENT (TABLE 3):

- On average the Market Region as a whole boasts a higher percentage of residents (42%) with post-secondary education than residents of the Pomeroy/Middleport Market Area (25%).

COMMUTING (TABLE 4):

- 52% of the of the Pomeroy/Middleport Market Area (Meigs County) workers traveled outside Meigs County for employment in 2000; a 7% increase from 1990.
- In 2000, 15% of the workers in surrounding Ohio counties commuting into Meigs County for employment. This figure decreased 3% since 1990. Residents of Mason County (WV) comprised the largest group of Meigs County in-commuting workers. However, that number has decreased 40% between 1990 and 2000 (from 334 to 199).
- The largest destination for Meigs County out-commuting workers was Athens County; increasing 27% from 1990-2000 (from 1047 to 1334). Out-commuters are potentially shopping on their way to or from their work destination resulting in retail sales shifting from Meigs County to other counties, such as Athens.

COMPARING THE MARKET AREA AND MARKET REGION TO THE STATE OF OHIO

HOUSING CHARACTERISTICS

- The home ownership rate in the Pomeroy/Middleport Market Area (69%) was more similar to that of the State of Ohio (71%) than of the larger Market Region (65%). (<http://www.census.gov/hhes/www/housing/hvs/annual04/ann04t13.html>)
- The median home value for the Pomeroy/Middleport Market Area (\$53,700) was slightly over 50% of the median home value for the State of Ohio (\$103,700) in 2000. The Market Region's median home value was \$74,000 in 2000. (<http://www.census.gov/hhes/www/housing/census/historic/values.html>)

INCOME

- In 2000, the per capita income for the Pomeroy/Middleport Market Area was 49% (\$13,900) and the overall Market Region was 60% (\$17,000) compared to the per capita income for Ohio (\$28,200).
- By 2005, the per capita income gap between the Pomeroy/Middleport Market Area and the State of Ohio decreased 4%, with a per capita income of \$16,900 vs \$31,900. The percentage increase in per capita income over the time period 2000-2005 for the Pomeroy/Middleport Market Area was 22%, compared to 23% for the region, and 13% for the State of Ohio. (<http://www.odod.state.oh.us/Research/files/E200/e200000001.pdf>)

LIFE CYCLE

- In 2000, the median age of residents in the Pomeroy/Middleport Market Area and the Market Region was 39.1. This compares to a median age of 36.2 for the State of Ohio. (<http://www.ams.usda.gov/statesummaries/OH/MSA/MSA.pdf/Ohio.pdf>)

EMPLOYMENT

- The average annual unemployment rate for the Pomeroy/Middleport Market Area in 2000 was 6%. The Market Region and the State of Ohio unemployment rates were 4%. (<http://www.economagic.com/em-cgi/data.exe/blsla/lasst39000003>)
- The 2006 unadjusted annual average for Meigs County was 8.5% compared to the State of Ohio's 5.5%. (<http://lmi.state.oh.us/ASP/LAUS/vbLAUS.asp>)
- The agriculture and mining sectors account for 8% of employment in the Pomeroy/Middleport Market Area. These sectors account for only 2% of employment in the Market Region overall and less than .01% of employment in the State of Ohio. (http://lmi.state.oh.us/ces/lmr_aa/CES_2005aeN.pdf)

EDUCATIONAL ATTAINMENT

- On average the Market Region as a whole boasts a higher percentage of residents (42%) with post-secondary education than residents of the Pomeroy/Middleport Market Area (25%). The Pomeroy/Middleport Market Area is similar to the percentage of residents in the State of Ohio (27%) with post-secondary education. (<http://www.odod.state.oh.us/research/FILES/P000210002.pdf>)

Socio-Economics 2000, 2005 (estimated), 2010 (projected)						
For the Pomeroy Market Area and the Entire Pomeroy Market Region						
	2000		2005		2010	
	Pomeroy Market Area	Market Region	Pomeroy Market Area	Market Region	Pomeroy Market Area	Market Region
Population	26699	650944	26649	648919	26561	647458
2000 Group Quarters	334	18873	334	19656	N/A	N/A
Households	10744	267177	10986	272459	11074	274631
Average Household Size	2.45	2.00	2.40	2.35	2.37	2.32
Families	7610	178397	7586	176224	7467	172487
Average Family Size	2.99	2.96	2.89	2.86	2.88	2.85
Housing Units	12504	293565	12641	300996	12828	305293
Owner Occupied Housing Units	69%	65%	71%	67%	70%	67%
Renter Occupied Housing Units	17%	26%	16%	24%	16%	23%
Vacant Housing Units	14%	9%	13%	9%	14%	10%
Median Household Income	\$27,398	\$32,382	\$32,265	\$37,092	\$36,637	\$42,047
Median Home Value	\$53,747	\$74,030	\$73,182	\$98,520	\$89,330	\$113,859
Per Capita Income	\$13,932	\$17,081	\$16,929	\$20,959	\$19,729	\$24,652
	2000		2005		2010	
	Pomeroy	Region	Pomeroy	Region	Pomeroy	Region
Household Income Base	10765	267387	10986	272459	11074	274631
<15,000	26%	23%	22%	18%	20%	15%
\$15,000 - \$24,999	20%	16%	17%	14%	13%	12%
\$25,000 - \$34,999	15%	14%	14%	13%	15%	12%
\$35,000 - \$49,999	17%	17%	17%	16%	17%	15%
\$50,000 - \$74,999	15%	16%	17%	18%	18%	19%
\$75,000 - \$99,999	5%	7%	7%	9%	9%	10%
\$100,000 - \$149,999	2%	4%	4%	8%	7%	11%
\$150,000 - \$199,999	0%	1%	1%	2%	1%	3%
\$200,000+	0%	1%	1%	2%	1%	3%
Average Household Income	\$34,345	\$41,675	\$40,721	\$49,839	\$46,943	\$58,067

Table 1: Socio-Economics 2000, 2005 (estimated), 2010 (projected)

	2000		2005		2010	
	Pomeroy/Mid	Region	Pomeroy/Mid	Region	Pomeroy/Mid	Region
Median Age	39.1	39.1	41.7	41.4	43.6	42.8
Population by Age	2000		2005		2010	
	Pomeroy/Mid	Region	Pomeroy/Mid	Region	Pomeroy/Mid	Region
Total	26699	677643	26649	648919	26561	647458
0 - 4	6%	6%	6%	6%	6%	5%
5 - 9	6%	6%	6%	6%	5%	5%
10 - 14	7%	6%	6%	6%	6%	6%
15 - 24	13%	15%	12%	14%	11%	14%
25 - 34	12%	13%	12%	13%	11%	11%
35 - 44	15%	15%	14%	13%	13%	13%
45 - 54	14%	15%	16%	16%	16%	15%
55 - 64	11%	10%	13%	12%	15%	14%
65 - 74	9%	8%	9%	8%	9%	8%
75 - 84	5%	5%	5%	6%	6%	5%
85 +	2%	2%	2%	2%	2%	2%
18 +	76%	78%	79%	80%	79%	80%
2000 Households by Type	Pomeroy/Mid		Region			
Total	10744	267177				
Family Households	71%	67%				
Married-couple Family	57%	53%				
With Related Children	5%	4%				
Other Family (No Spouse)	14%	14%				
With Related Children	1%	1%				
Nonfamily Households	29%	33%				
Householder Living Alone	26%	28%				
Householder Not Living Alone	3%	5%				
Households with Persons 65+	15%	14%				

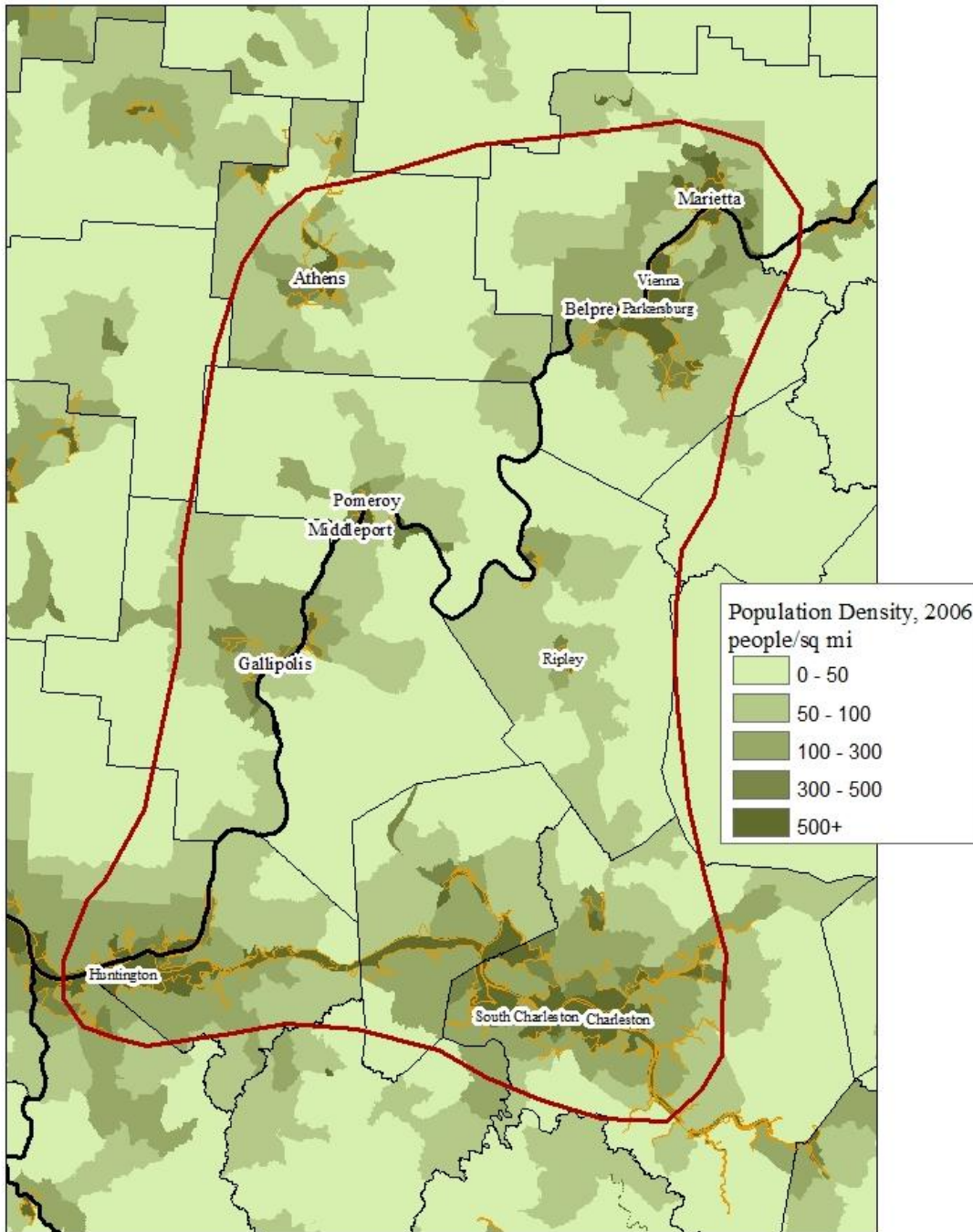
Table 2. Socio-Economics 2000, 2005 (estimated), 2010 (projected)

2000 Pop. 25+ by Educational Attainment	Pomeroy/Mid	Region	2000 Pop 16+ by Employment Status	Pomeroy/Mid	Region
Total	18171	436856	Total	21208	525431
Less Than 9th Grade	9%	7%	In Labor Force		
9th to 12th Grade, No Diploma	18%	13%	Civilian Employed	47%	54%
High School Graduate	47%	38%	Civilian Unemployed	6%	4%
Some College, No Degree	13%	19%	In Armed Forces	0.1%	0.1%
Associate Degree	5%	5%	Not In Labor Force	47%	42%
Bachelor's Degree	5%	11%			
Master's/Prof/Doctorate Degree	2%	7%			
			2005 Employed Population 16+ by Industry		
2005 Civilian Pop. 16+ in Labor Force	Pomeroy/Mid	Region	Total	9666	291720
Civilian Employed	88%	95%	Agriculture/Mining	8%	2%
Civilian Unemployed	12%	5%	Construction	9%	7%
			Manufacturing	8%	10%
2005 Employed Pop. 16+ by Occupation	Pomeroy/Mid	Region	Wholesale Trade	2%	3%
Total	9666	291720	Retail Trade	14%	13%
White Collar	56%	68%	Transportation/Utilities	10%	6%
Management/Business/Financial	7%	9%	Information	1%	2%
Sales	9%	12%	Finance/Insurance/Real Estate	3%	6%
Administrative Support	11%	15%	Other Services	41%	45%
Blue Collar	44%	32%	Public Administration	4%	6%
Farming/Forestry/Fishing	2%	0%			
Construction/Extraction	9%	6%			
Installation/Maintenance/Repair	7%	4%			
Production	8%	5%			
Transportation/Material Moving	10%	7%			

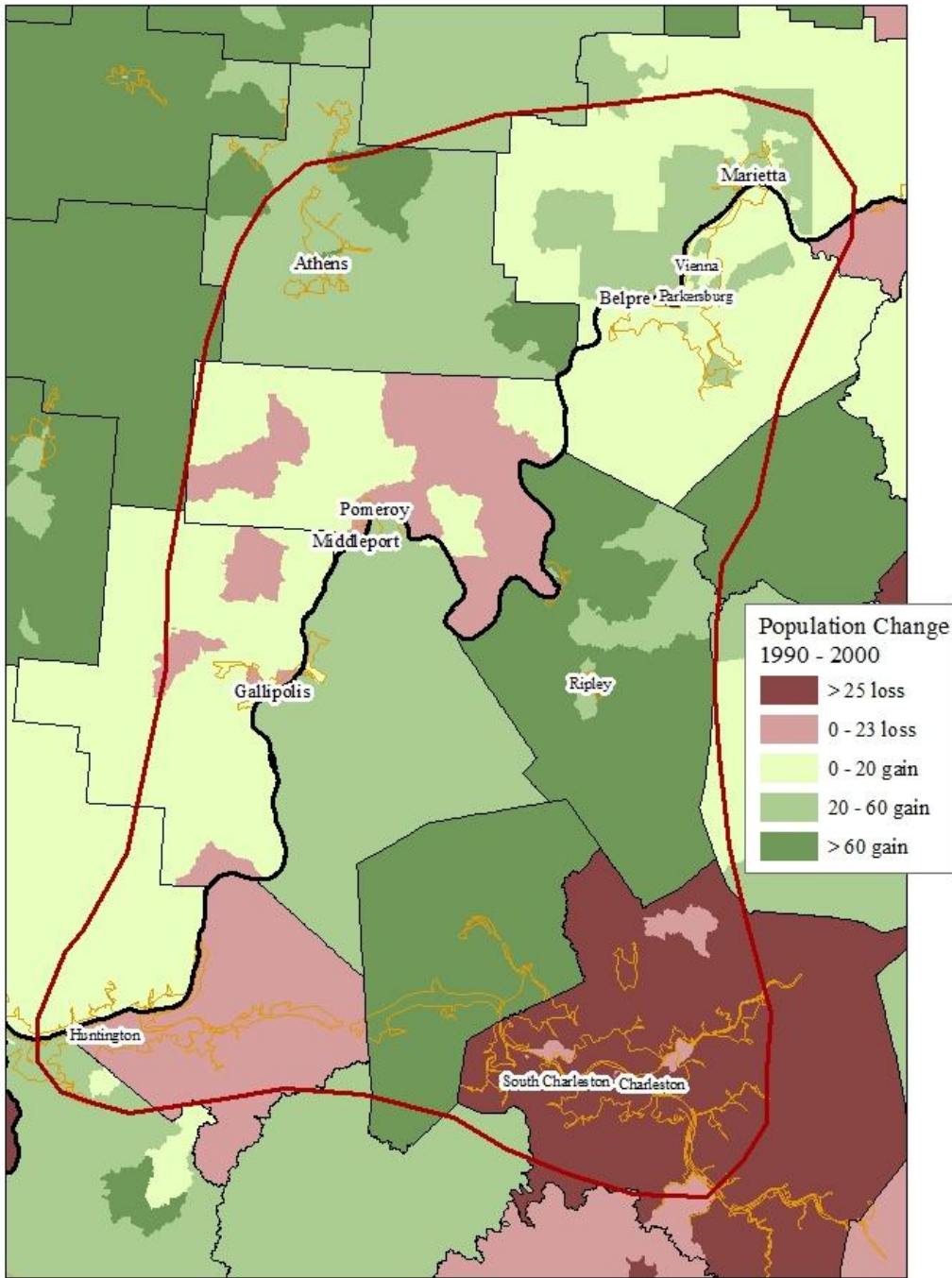
Table 3. Socio-Economics 2000, 2005 (estimated), 2010 (projected)

Commuting Patterns	1990	2000	% Change
Total Workers	7518	8752	16%
Commuting Out of County(Total)	3380	4521	34%
% Commuting Out of County	45%	52%	7%
Largest Destination (2000): Athens County, Ohio	1047	1334	27%
	1990	2000	% Change
Total Commuting from other Ohio Counties into Meigs County	951	800	-16%
% Commuting from other Ohio Counties into Meigs County	18%	15%	-3%
Largest Contributor (2000): Mason County, WV	334	199	-40%

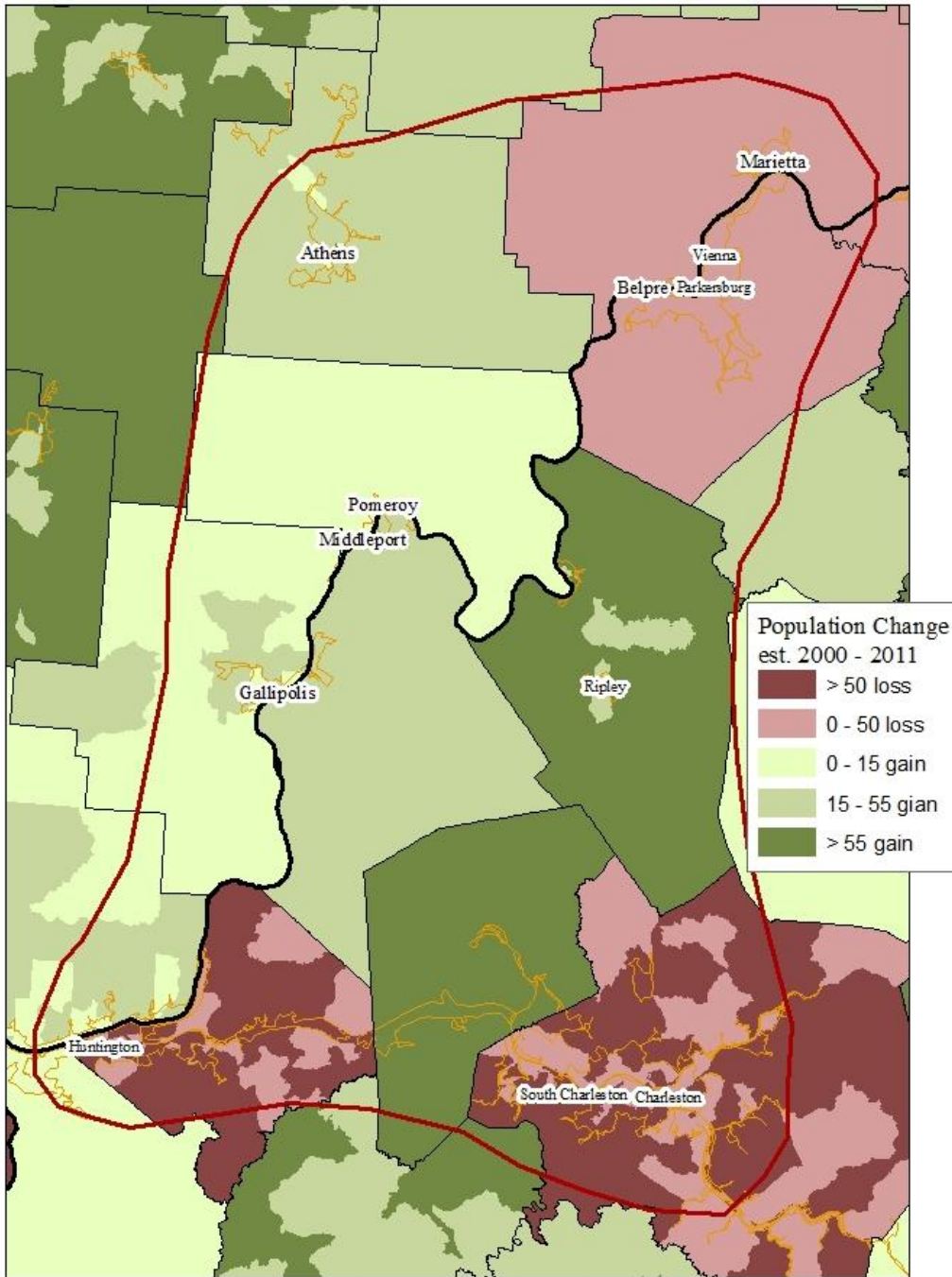
Table 4: Commuting Patterns, 1990 and 2000



Map 3: Population Distribution, Estimated 2006



Map 4: Population Change, 1990 - 2000



Map 5: Projected Population Change, 2000-2011

III. Estimated Surplus/Leakage Results for the Pomeroy/Middleport, Ohio Market Area and Competing Market Areas

The larger Pomeroy/Middleport Market Region is comprised of businesses located within the communities of Pomeroy and Middleport and surrounding areas including: Athens, Belpre, Charleston, Gallipolis, Huntington, Marietta, Parkersburg/Vienna and Ripley (**Map 2**). This Market Region was determined from task force input regarding the average maximum distance traveled by local residents for retail shopping.

For the purpose of this report, competing Market Centers are defined as population centers identified by the task force and other centers with a population over 2,000. The area around the center from which that center “pulls” its customers is that center’s retail Market Area. **Table 5** illustrates the differences in estimated Market Area population and per capita income. Again, population and income are the two most important indicators of retail demand.

Market Area	2005 Pop	Pcap income, 2005
Athens	56,412	\$19,354
Belpre	14,857	\$22,500
Charleston	236,292	\$25,723
Galipolis	37,323	\$19,258
Huntington	124,301	\$21,165
Marietta	36,785	\$22,648
Parkersburg/Vienna	84,317	\$22,258
Pomeroy/Middleport	26,649	\$16,929
Ripley	31,983	\$18,794
Total	648,919	Ave. = \$25,524

Table 5: Estimated Market Area Population and Per Cap Income

Estimated Retail Sales:

RETAIL SALES BY MARKET AREA (**TABLE 6** AND **MAP 5**):

- Of the nine Market Areas in the Market Region, the Charleston Market Area ranked highest in estimated retail sales with nearly \$4.4 billion. This represents over 40% of the \$10.7 billion in total retail sales in the Market Region. The Huntington Market Area ranked second in sales and per capita sales behind the Charleston Market Area. The Pomeroy/Middleport Market Area ranked seventh (of nine) in per capita sales. In general, the most populated places have the greatest sales and the greatest sales/person.
- The Belpre Market Area had the lowest sales and lowest per capita sales.

RETAIL SALES WITHIN POMEROY/MIDDLEPORT MARKET AREA (**TABLE 7**):

- The Pomeroy/Middleport Market Area accounted for \$255 million of the \$10.7 billion in total estimated sales of the Market Region.
- The retail sector with highest estimated sales in the Pomeroy/Middleport Market Area was Grocery Stores at \$74,857,000. This sector accounts for almost 30% of all retail sales within the Pomeroy/Middleport Market Area. Non-Discount Department Stores account for about 17% of retail sales at \$44,388,000. Gasoline Service Stations and

Motor Vehicles & Supplies round out the top for retail sales at \$38,084,000 and \$21,000,000.

Estimated Retail Sales Surplus/Leakage:

Retail sales surpluses and leakages were estimated for each retail sector for each Market Area by comparing the actual retail sales in that sector with “potential” sales. Potential sales were estimated based on the population of the Market Area and the per capita income of the residents living in the Market Area relative to the whole region. Potential sales are the annual sales that a Market Area could achieve if all the residents shopped locally. A surplus results if actual sales are greater than potential sales, and vice versa, a leakage results if actual sales are less than potential sales.

By summing all surpluses and leakages across all retail sectors, a total retail sales surplus/leakage estimate is calculated. This number indicates if there is a net surplus or leakage of total retail dollars for each of the Market Areas.

RETAIL SALES SURPLUS/LEAKAGE BY MARKET AREA (TABLE 6 AND MAP 6):

- Out of a total of 32 retail sectors, the Belpre Market Area had the fewest sectors with surpluses at a total of 8. The Huntington Market Area and Parkersburg/Vienna Market Area both are at the top with 19 sectors with a sales surplus.
- The Huntington Market Area accounted for the largest surplus with over \$300 million in surplus retail sales. The Parkersburg/Vienna Market Area ranked second with \$152 million in surplus sales.
- Ranked by per capita surplus sales, the Huntington Market Area ranked highest with nearly \$2,677 in per capita surplus sales.
- Despite the Charleston Market Area’s strong showing in sales, this Market Area ranks low in surplus and leakages.
- The Athens Market Area also ranks low, perhaps as a result of the overwhelming presence of students. Students have very different lifestyles and therefore purchasing habits.

RETAIL SALES SURPLUS/LEAKAGE WITHIN THE POMEROY/MIDDLEPORT MARKET AREA (TABLE 7):

Table 7 lists the 2005 potential retail sales and surplus/leakage calculations for each retail sector for the Pomeroy/Middleport Market Area.

- Of 32 retail sectors studied, the Pomeroy/Middleport Market Area contained 10 sectors with a retail sales surplus. There were 22 sectors with a retail sales leakage.
- Sectors with the greatest sales surplus in the Pomeroy/Middleport Market Area were: Hardware Stores (+253%); Grocery Stores (+71%); and Gas Stations (+61%).

- Sectors with a relatively high degree of sales leakages in which the Pomeroy/Middleport Market Area had any sales include: Books & Office Supplies (-96%); Recreational Vehicle Dealers (-94%); Apparel & Accessory Stores (-89%); and Electronics, Music & Videos (-80%).
- Six of the 8 other Market Areas in the Market Region had surpluses in Recreational Vehicles. Four out of the other 8 Market Areas in the Market Region had surpluses in Retail Nurseries and Lawn Supplies, Household Appliances, Books and Office Supplies and Sporting Goods & Bicycle Shops.
- The Pomeroy/Middleport Market Area had surpluses in some sectors that only three other market areas did: Variety and General Merchandise, Florists and Non-Discount Department Stores.

Retail Diversity (Surplus Sectors) by Market Area (Table 6 and Map 7):

A key indicator of retail health is the diversity of retail sectors recording a surplus. Local economies which enjoy a large number of surplus sectors may be more stable in terms of dealing with fluctuations in the local and national economies. For example, a community with a large aggregate retail sales surplus that is based primarily in motor vehicle sales would be much more sensitive to a national decline in auto sales than a community with a smaller aggregate surplus that was distributed across many retail sectors.

- The Pomeroy/Middleport Market Area had retail sales surplus in 10 of 32 retail sectors. The more populous Huntington and Parkersburg/Vienna Market Areas have the greatest diversity of surplus sectors, with 19 each.
- The most-populated Charleston Market Area had 10 surplus sectors.

Retail Hierarchy of the Pomeroy/Middleport Market Area (Figure 1):

Figure 1 lists the retail sectors that are analyzed in this report according to their place in the hierarchy of retail goods from convenience to specialty sectors and sales. The items at the bottom of the hierarchy are labeled convenience or “everyday” items that people buy frequently and that they are most likely to buy locally. Stores that sell these items, including grocery stores and gas stations, are found in almost all towns. As **Figure 1** indicates, towns with only these basic retail services are labeled minimum convenience places. On the other hand, the items at the top of the hierarchy are specialty items that are not bought on a frequent basis, including hobby goods, optical goods, books, and cameras. Stores specializing in goods such as these are usually found in larger towns and cities. A complete shopping place is one that has all of the retail sectors considered here.

Based on the distribution of sales and its population, the Pomeroy/Middleport Market Area would most likely be considered a partial shopping destination. The Pomeroy/Middleport Market Area appears to have more leakage sectors than surplus sectors in the more specialized sectors that comprise the complete shopping category. However, the Pomeroy/Middleport Market Area also has leakages in some of the most very basic convenience sectors, such as Drug

Stores & Proprietary Stores and other more convenience sectors such as restaurants. This indicates a variety of potential sectors in which to plug leakages.

Discussion:

In comparison to other Market Areas in the Market Region, the Pomeroy/Middleport Market Area is struggling. But this Market Area still is faring better than expectations, given that the Pomeroy/Middleport Market Area by far has the lowest per capita income of any of the Market Areas. In addition, the Pomeroy/Middleport Market Area is second to last in estimated population. Population and income are the two biggest drivers of retail health.

The Pomeroy/Middleport Market Area ranks sixth in terms of the number of sectors with retail sales surplus and in total retail sales. It ranks seventh in terms of per capita retail sales surplus. And, the Pomeroy/Middleport Market Area also ranks seventh in terms of surplus per capita. What is key to note is that almost \$3000 per capita of retail spending which could be taking place within the Pomeroy/Middleport Market Area is occurring elsewhere. This may be explained by the significant percentage of out-commuting to other surrounding counties. However, Athens County in many respects is faring worse than the Pomeroy/Middleport Market Area, yet it receives largest number of in-commuters.

The anchors of this Market Region, namely the Huntington and Parkersburg/Vienna Market Areas, are doing quite well. However, projected population gains are expected to take place outside these two Market Areas. Furthermore, one would expect the Charleston Market Area to be faring better in surplus given the high population and high income. One contributing factor to this ranking could be the consistent population loss in the Charleston Market Area.

**Pomeroy / Middleport and Surrounding Market Areas
Ranked by Per Capita Sales, Per Capita Surplus and
Number of Surplus Retail Sectors ***

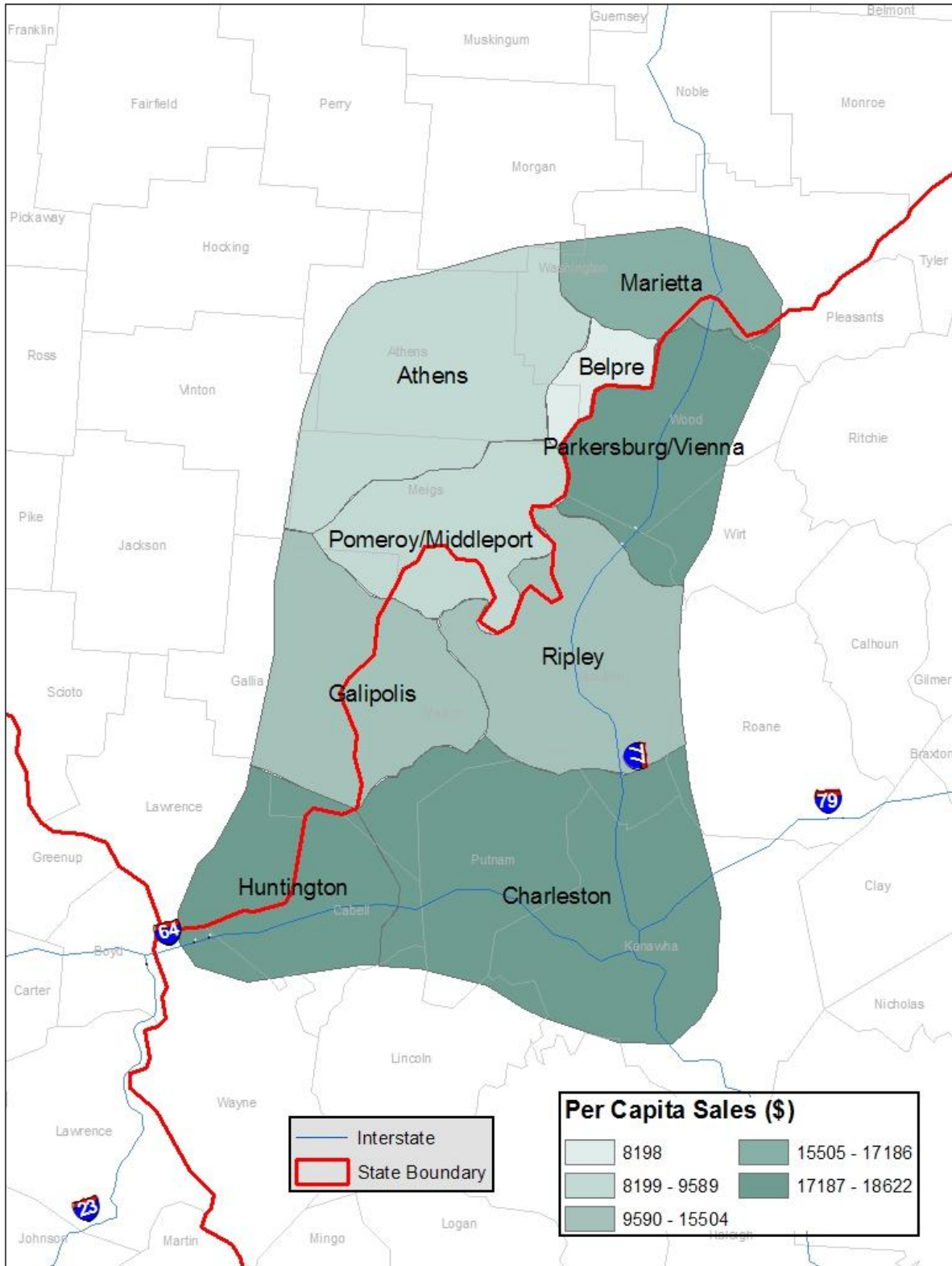
Rank	Market Area	\$ Sales in 2005	Per capita sales
1	Charleston	\$ 4,400,339,500	\$ 18,622
2	Huntington	\$ 2,277,584,000	\$ 18,323
3	Parkersburg/Vienna	\$ 1,538,685,000	\$ 18,249
4	Marietta	\$ 632,182,500	\$ 17,186
5	Galipolis	\$ 578,653,000	\$ 15,504
6	Ripley	\$ 451,791,000	\$ 14,126
7	Pomeroy/Middleport	\$ 255,526,000	\$ 9,589
8	Athens	\$ 539,943,000	\$ 9,571
9	Belpre	\$ 121,799,000	\$ 8,198

Rank	Market Area	\$ Surplus 2005	Per capita surplus
1	Huntington	\$ 332,741,706	\$ 2,677
2	Parkersburg/Vienna	\$ 152,325,467	\$ 1,807
3	Galipolis	\$ 47,304,790	\$ 1,267
4	Marietta	\$ 16,744,157	\$ 455
5	Ripley	\$ 8,296,159	\$ 259
6	Charleston	\$ (92,926,516)	\$ (393)
7	Pomeroy/Middleport	\$ (77,980,050)	\$ (2,926)
8	Athens	\$ (267,168,860)	\$ (4,736)
9	Belpre	\$ (119,488,430)	\$ (8,043)

Rank	Market Area	# of Surplus Sectors 2005
1	Huntington	19
2	Parkersburg/Vienna	19
3	Marietta	16
4	Athens	12
5	Galipolis	12
6	Pomeroy/Middleport	10
7	Charleston	10
8	Ripley	9
9	Belpre	8

* out of 33 retail sectors

Table 6: Pomeroy/Middleport and Surrounding Market Areas Ranked by: Total Retail Sales, Total Surplus/Leakage, & Total of Surplus Sectors*

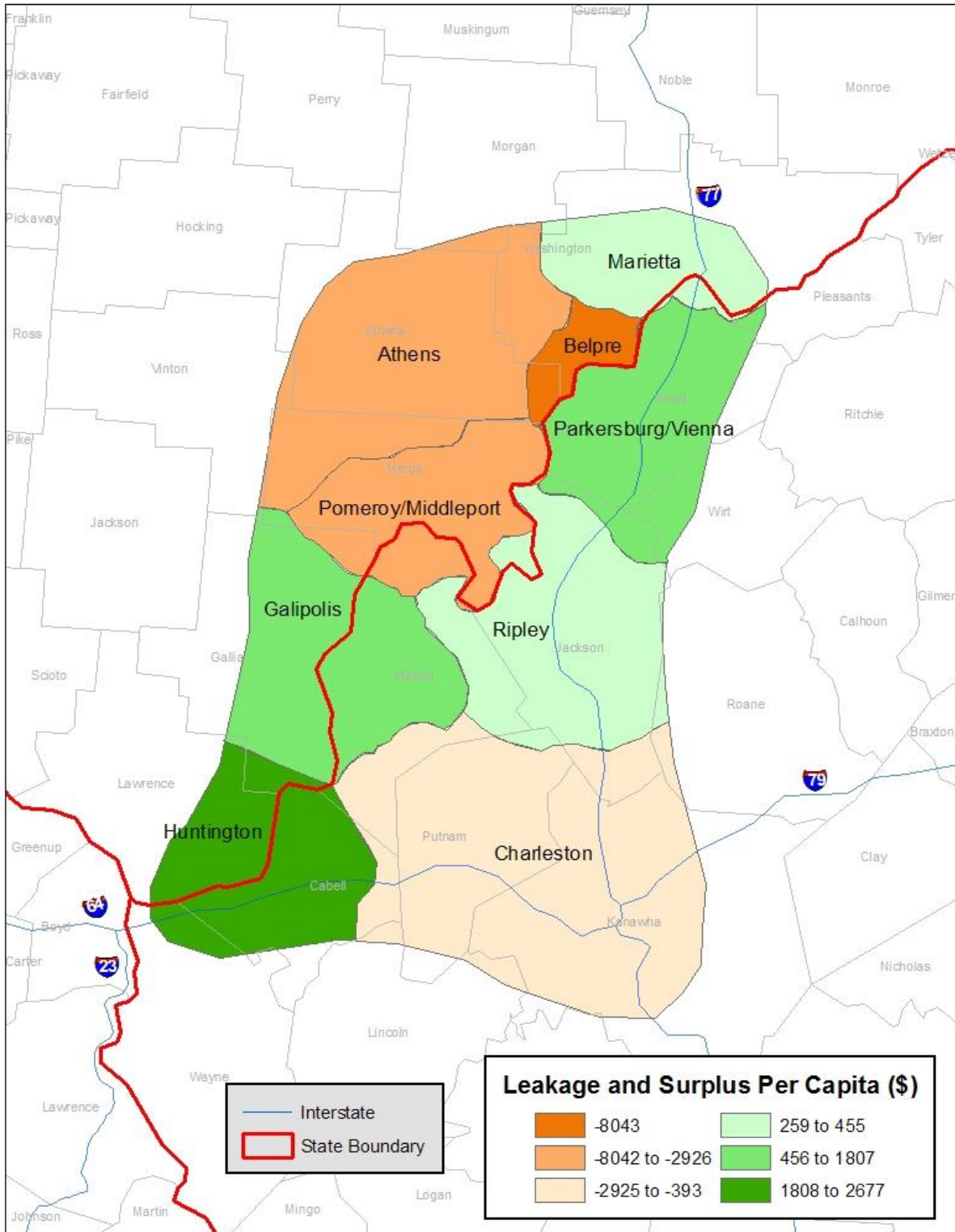


Map 6: Estimated 2006 Sales per Capita by Market Area

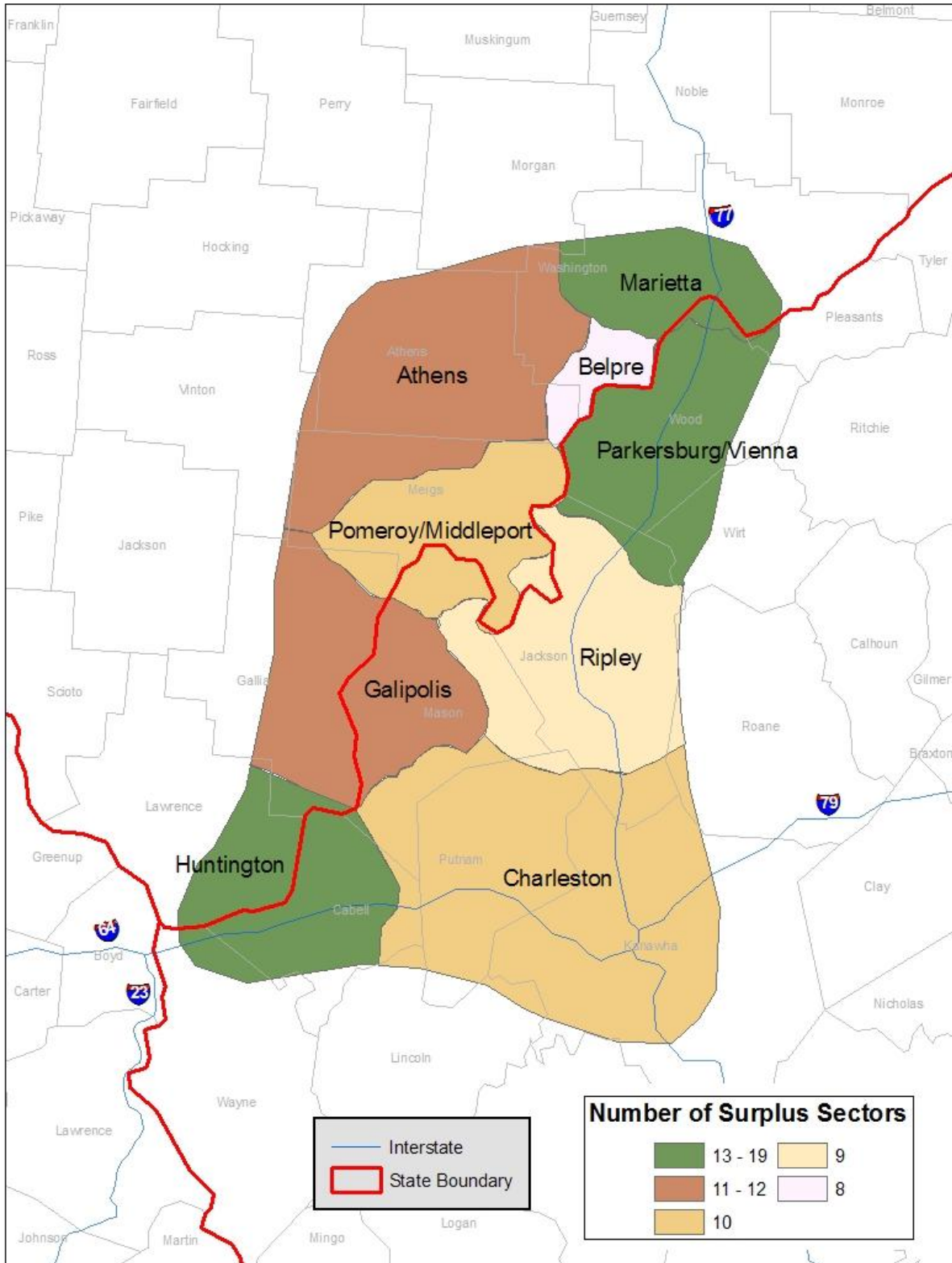
Retail Type	Potential Sales	Actual Sales	Surplus/Leakage	Surplus/Leakage per capita	% Surplus/Leakage	Areas with a Surplus
Apparel & Accessory Stores	\$6,512,000	\$706,000	\$ (5,806,000)	\$ (218)	-89%	3
Bakeries	\$1,141,697	\$280,000	\$ (861,697)	\$ (32)	-75%	3
Books & Office Supplies	\$3,043,701	\$121,000	\$ (2,922,701)	\$ (110)	-96%	4
Camera & Photographic Supply Stores	\$103,711	\$0	\$ (103,711)	\$ (4)	-100%	1
Candy Nut & Confectionary Stores	\$81,024	\$0	\$ (81,024)	\$ (3)	-100%	1
Discount Department Stores	\$7,305,513	\$4,860,000	\$ (2,445,513)	\$ (92)	-33%	1
Drinking Establishments	\$781,161	\$1,050,000	\$ 268,839	\$ 10	34%	4
Drug Stores & Proprietary Stores	\$13,867,702	\$11,163,000	\$ (2,704,702)	\$ (101)	-20%	2
Electronics, Music & Videos	\$7,884,658	\$1,570,000	\$ (6,314,658)	\$ (237)	-80%	4
Florists	\$881,543	\$952,000	\$ 70,457	\$ 3	8%	3
Furniture and Home Furnishings	\$7,726,376	\$6,167,000	\$ (1,559,376)	\$ (59)	-20%	3
Gasoline Service Stations	\$12,475,999	\$21,000,000	\$ 8,524,001	\$ 320	68%	4
Gift Novelty & Souvenir Shops	\$1,544,862	\$1,547,000	\$ 2,138	\$ 0	0%	4
Grocery Store	\$43,685,041	\$74,857,000	\$ 31,171,959	\$ 1,170	71%	4
Hardware Stores	\$1,572,796	\$5,547,000	\$ 3,974,204	\$ 149	253%	4
Hobby Toy & Game Shops	\$2,253,985	\$1,022,000	\$ (1,231,985)	\$ (46)	-55%	2
Household Appliance Stores	\$2,072,491	\$2,834,000	\$ 761,509	\$ 29	37%	4
Jewelry Stores	\$1,892,355	\$1,560,000	\$ (332,355)	\$ (12)	-18%	2
Liquor Stores	\$1,241,692	\$1,130,000	\$ (111,692)	\$ (4)	-9%	3
Lumber and Other Building Materials	\$24,016,006	\$10,293,000	\$ (13,723,006)	\$ (515)	-57%	3
Miscellaneous Retail	\$7,007,436	\$6,313,000	\$ (694,436)	\$ (26)	-10%	3
Mobile Home Dealers	\$1,968,904	\$0	\$ (1,968,904)	\$ (74)	-100%	5
Motor Vehicles & Supplies	\$100,557,057	\$38,084,000	\$ (62,473,057)	\$ (2,344)	-62%	4
Non-Discount Department Stores	\$42,237,964	\$44,388,000	\$ 2,150,036	\$ 81	5%	3
Optical Goods Stores	\$614,086	\$0	\$ (614,086)	\$ (23)	-100%	2
Recreational Vehicle Dealers	\$5,457,945	\$332,000	\$ (5,125,945)	\$ (192)	-94%	6
Restaurants	\$29,063,196	\$15,280,000	\$ (13,783,196)	\$ (517)	-47%	4
Retail Nurseries & Lawn Supply Stores	\$941,733	\$1,080,000	\$ 138,267	\$ 5	15%	4
Shoe Stores	\$1,320,093	\$1,152,000	\$ (168,093)	\$ (6)	-13%	3
Sporting Goods & Bicycle Shops	\$2,423,318	\$740,000	\$ (1,683,318)	\$ (63)	-69%	4
Used Merchandise Stores	\$861,048	\$352,000	\$ (509,048)	\$ (19)	-59%	5
Variety and General Merchandise	\$968,957	\$1,146,000	\$ 177,043	\$ 7	18%	3
Grand Total	\$333,506,050	\$255,526,000	-\$77,980,050	\$ (2,926)	-23%	5

* Shaded Areas indicate Surplus Sector for Pomeroy/Middleport

Table 7: Surplus/Leakage for Pomeroy/Middleport Market Area

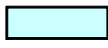


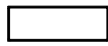
Map 7: Estimated 2006 Surplus/Leakage per Capita by Market Area



Map 8: Total Number of Estimated 2006 Surplus Sectors by Market Area

			Retail Sector	Actual Sales	Surplus/ Leakage*
			Optical Goods Stores	\$ -	\$ (614,086)
			Hobby Toy & Game Shops	\$ 1,022,000	\$ (1,231,985)
			Books & Office Supplies	\$ 121,000	\$ (2,922,701)
			Recreational Vehicle Dealers	\$ 332,000	\$ (5,125,945)
			Camera & Photographic Supply Stores	\$ -	\$ (103,711)
			Candy Nut & Confectionery Stores	\$ -	\$ (81,024)
			Sporting Goods & Bicycle Shops	\$ 740,000	\$ (1,683,318)
			Mobile Home Dealers	\$ -	\$ (1,968,904)
			Jewelry Stores	\$ 1,560,000	\$ (332,355)
			Florists	\$ 952,000	\$ 70,457
			Gift Novelty & Souvenir Shops	\$ 1,547,000	\$ 2,138
			Shoes Stores	\$ 1,152,000	\$ (168,093)
			Apparel & Accessory Stores	\$ 706,000	\$ (5,806,000)
			Lumber & Other Building Materials	\$ 10,293,000	\$ (13,723,006)
			Discount Department Stores	\$ 4,860,000	\$ (2,445,513)
			Non-Discount Department Stores	\$ 44,388,000	\$ 2,150,036
			Electronics, Music & Videos	\$ 1,570,000	\$ (6,314,658)
			Retail Nurseries & Lawn Supply Stor	\$ 1,080,000	\$ 138,267
			Furniture & Home Furnishings	\$ 6,167,000	\$ (1,559,376)
			Household Appliance Stores	\$ 2,834,000	\$ 761,509
			Motor Vehicles & Supplies	\$ 38,084,000	\$ (62,473,057)
			Retail Bakeries	\$ 280,000	\$ (861,697)
			Used Merchandise Stores	\$ 352,000	\$ (509,048)
			Liquor Stores	\$ 1,130,000	\$ (111,692)
			Variety and General Merchandise	\$ 1,146,000	\$ 177,043
			Drinking Places	\$ 1,050,000	\$ 268,839
			Eating Places	\$ 15,280,000	\$ (13,783,196)
			Hardware Stores	\$ 5,547,000	\$ 3,974,204
			Drug Stores & Proprietary Stores	\$ 11,163,000	\$ (2,704,702)
			Grocery Stores	\$ 74,857,000	\$ 31,171,959
			Gasoline Service Stations	\$ 21,000,000	\$ 8,524,001
				\$ 255,526,000	\$ (77,980,050)

 Indicates that all goods are sold at this retail center level

 Indicates that some goods are sold at this retail center level

*Leakages are shown in parentheses

Figure 1: Hierarchy of Retail Sales for Pomeroy/Middleport Market Area

IV. Meigs County

For the purpose of the analysis above, the retail sales occurring within Meigs County were divided among the larger Pomeroy/Middleport Market Area, Ripley Market Area, Athens Market Area, and Gallipolis Market Areas based on proximity and ease of travel to the neighboring market centers. Gaining a better understanding of Meigs County's retail sales (independent of the market region approach) can be helpful from a county and local governance perspective.

The economic interdependence between Meigs County and the larger Pomeroy/Middleport Market Area is significant since the majority of the Meigs County retail sales (and residents) occur within in the Pomeroy/Middleport Market Area. To better understand the economic role that Meigs County plays in the Pomeroy/Middleport Market Area, it is helpful to examine the proportion of retail sales in the Pomeroy/Middleport Market Area that are attributed to retailers in Meigs County. In other words, this level of analysis is meant to illustrate the extent to which Meigs County retail sales contribute to the retail sales of the Pomeroy/Middleport Market Area.

Table 8 shows the proportion of sales in the Pomeroy/Middleport Market Area that are attributed to retailers within Meigs County. A few items of note:

- Retailers in Meigs County accounted for 100% of the retail sales in the Pomeroy/Middleport Market Area in the following nine sectors:
 - Apparel & Accessory Stores
 - Bakeries
 - Books and Office Supplies
 - Hobby Toy & Game Shops
 - Household Appliances Stores
 - Liquor Stores
 - Recreational Vehicle Dealers
 - Retail Nurseries & lawn Supply Stores
 - Used Merchandise Stores
- There were Meigs County retailers in two retail sectors with sales from beyond the Pomeroy/Middleport Market Area. These retail sectors with a sales surplus include:
 - Motor Vehicles & Supplies
 - Electronic, Music & Videos.
- Finally, it is equally important from the county's perspective to examine the retail sectors that Meigs County retailers contribute little to in the way of sales to the Pomeroy/Middleport Market Area. Seventeen of the 32 sectors fit this category. Two of the sectors that the county contributes very little to are Grocery Stores,

and Non-Discount Department Stores. Many of these sectors have leakages, suggesting there may be opportunities for development officials to work with these retailers to increase sales of these types of businesses.

		% of Market
	Retail Types	Retail Sales
		Area Sales
	Apparel & Accessory Stores \$	706,000 100%
	Bakeries \$	280,000 100%
	Books & Office Supplies \$	121,000 100%
	Camera & Photographic Supply Stores \$	-
	Candy Nut & Confectionary Stores \$	-
	Discount Department Stores \$	2,916,000 60%
	Drinking Establishments \$	750,000 71%
	Non-Discount Department Stores \$	162,000 0%
	Drug Stores & Proprietary Stores \$	9,699,000 87%
	Electronics, Music & Videos \$	1,972,000 126%
	Florists \$	612,000 64%
	Furniture and Home Furnishings \$	4,567,000 74%
	Gasoline Service Stations \$	15,900,000 76%
	Gift Novelty & Souvenir Shops \$	1,274,000 82%
	Grocery Store \$	27,969,000 37%
	Hardware Stores \$	5,031,000 91%
	Hobby Toy & Game Shops \$	1,022,000 100%
	Household Appliance Stores \$	2,834,000 100%
	Jewelry Stores \$	624,000 40%
	Liquor Stores \$	1,130,000 100%
	Lumber and Other Building Materials \$	8,343,000 81%
	Miscellaneous Retail \$	1,876,000 30%
	Mobile Home Dealers \$	-
	Motor Vehicles & Supplies \$	43,143,000 113%
	Optical Goods Stores \$	-
	Restaurants \$	12,920,000 85%
	Recreational Vehicle Dealers \$	332,000 100%
	Retail Nurseries & Lawn Supply Stores \$	1,080,000 100%
	Shoe Stores \$	576,000 50%
	Sporting Goods & Bicycle Shops \$	444,000 60%
	Used Merchandise Stores \$	352,000 100%
	Variety and General Merchandise \$	306,000 27%
	Grand Total \$	146,941,000 58%

Table 8: Sales Associated for Meigs County (by Sector)

VI. Developing Local Retail Strategies

There are several general approaches that local communities may choose to follow in developing targeted retail strategies based on the results from a retail market analysis and their own knowledge regarding the local retail market. Community leaders may want to consider the following common strategies:

Plug leakages in sales of non-specialized goods

Leakages in sales from the more specialized retail stores (those sectors identified toward the top of **Figure 1**, such as optical goods and toy stores) are expected from a place with a lower population and per capita income. However, because people are more inclined to shop locally for convenience goods such as groceries, drugstore items, and hardware; large leakages in sales from stores selling convenience goods should not be expected.

Large leakages in such convenience goods sales suggest that retailers located *outside* the Pomeroy/Middleport Market Area are out-competing the local retailers and drawing local residents and their retail dollars away from their local market area. This may occur for a variety of reasons. For example: local residents who commute outside the local area to work spend their retail dollars at retailers near their place of work; regional retail centers may exist within close proximity of the Pomeroy/Middleport Market Area that contain larger stores with more variety and lower prices, and/or; a lack of competitive pricing, selection, quality, or customer service from local stores exists which discourages local residents from spending their retail dollars at retailers in the Pomeroy/Middleport Market Area.

Large leakages in the convenience goods sectors can be addressed by working with existing local retailers to address issues identified above and/or by recruiting new retail businesses to the community.

Build on existing surpluses

A retail surplus signals either that people from outside the Pomeroy/Middleport Market Area are traveling to shop in that Market Area or that local residents are spending more (on average) than what people within the larger region spend on average. In either case, the surplus signals that a store or a group of stores have been able to establish themselves as the providers of a particular retail good or mix of goods. If the surplus is generated by one store, it is often the case that this store is well-established and has been successful at generating and maintaining a strong customer base over time. If the surplus is generated by a group of stores, it suggests that the local Market Area is known within the broader region as a place to shop for a particular good.

It may be possible to leverage such retail surpluses by considering the type of customer that is shopping at the store(s) with surplus sales and the type of goods they are purchasing there. In some cases, these customers may be willing to purchase complementary goods from other stores that are located conveniently nearby. For example, a community with a surplus in hardware sales might consider whether the hardware store customers might also be interested in shopping at other home-improvement stores, such as a nearby paint and lumber store or appliance store. As another example, a community with a surplus in sales from book stores may consider whether customers might be interested in other entertainment options, such as a movie theater or restaurant. Obtaining the right “mix of businesses” within close proximity to each other hinges on identifying stores that are complementary in some way to each other and (if they were located together or in close proximity) consumers would be likely to take advantage of one-stop shopping opportunities.

Identify underserved segments of the population

In addition to retaining existing retail customers with exceptional customer service, competitive prices, and a variety of product options, retailers also should consider the needs of *potential* new customers and work to meet those needs. Demographic information from the retail market analysis can be helpful in identifying growing segments of the population that may have unmet demands or shrinking segments of the population that have declining demands. Some examples of growing population segments are: (1) the racial or ethnic composition of local communities can change in response to local job opportunities (for example, local construction or other manual labor jobs); (2) the population of certain age groups may be increasing in size due to baby booms, or (3) higher income households may be increasing within the local area due to nearby urbanization pressures or the attraction of high-end residential development. In communities undergoing such changes, retailers must always be on the lookout for opportunities to attract new customers, which may require initiating a targeted marketing campaign or expanding their product selection.

Identify niche markets

It can often be difficult for stores in smaller shopping districts to compete against a large retailer that is able to offer lower prices and more variety or against large regional retail centers that contain a variety of specialized retail shops. However, there are still many opportunities for smaller stores and smaller shopping districts to carve out niche markets. For example, small retailers can focus on filling the “voids” in products or customer service which oftentimes exist in large retail stores or by focusing on quality over just low prices. A key advantage for small merchants is their ability to provide a high level of customer service; something that is oftentimes not found in large retail establishments. Strategies to develop special services such as home delivery, special ordering of merchandise, or free installation could also help to maximize this advantage.

Capitalize on other “attractive” aspects of the local community

There are often other aspects of a local community that draw visitors from outside the local area such as recreational opportunities (for example, a nearby lake or state park), natural amenities (the Ohio River for example) or other tourist destination sites such as a sports venue or historical site. Even though these activities may not center on shopping, there may be opportunities to draw people into the Market Area through targeted marketing and other promotional efforts.

VII. Definition of Terms

Retail center: A downtown or regional shopping district. In the case of the Pomeroy/Middleport, Ohio retail market analysis, the primary Market Center of interest is Pomeroy/Middleport, Ohio and the neighboring Market Centers are identified as: Baltimore, Bremen, Circleville, Logan, Nelsonville, New Lexington, Somerset, and Southeast Columbus.

Market Area: A geographic area that contains most of the customers that primarily shop in the retail center. The local Market Area is defined as the primary area in which the majority of customers live who shop in the local Market Center. The Market Area boundaries are estimated based on the amount of sales in the retail center and distance from this center. See the Methodology section for a more detailed description of this calculation.

Market Region: The larger geographic area that includes all the Market Areas of interest (see **Maps 2, 5, 6 and 7** for an illustration).

Potential sales: An estimate of sales that could be achieved in a Market Area if all the population living within the Market Area shopped within the Market Area. See the Methodology section for a more detailed description of this calculation.

Surplus: The positive difference between actual and potential sales. If actual retail sales within a Market Area are greater than the potential sales, then there is a sales surplus. A surplus implies either that people from outside the Market Area shop there or that people living within the Market Area consume more than the average person living within the region. This number may be expressed either in terms of dollars or as a percentage of potential sales.

Leakage: The negative difference between actual and potential sales. If actual retail sales within a Market Area are less than the potential sales, then there is a sales leakage. A leakage implies either that people living within the Market Area shop outside the Market Area or that people living within the Market Area consume less than the average person living within the region. *A leakage does not imply that businesses within this sector are failing—on the contrary, these businesses may be doing quite well. A leakage simply means that the total sales within the local area are not as much as they could be based on the local area's population and income. In other words, a leakage suggests that there is a potential opportunity for local businesses to capture additional local retail dollars.*

Estimated Actual Sales vs. Surplus/Leakage of Sales: A Market Area may have a large amount of actual sales within a certain sector, but still experience a leakage. Vice versa, the amount of actual sales of a particular sector may be small, but the Market Area has a surplus of sales. This is because surpluses and leakages take into account the average consumption of shoppers within the region. As a result, if the average consumer buys a large amount and if the population within the Market Area is large, then the potential sales within this sector will be high and may be greater than the actual sales, even if actual sales are high.

VIII. Methodology

Determining the Market Region: The definition of the relevant Market Region for each of the study areas is very important in analyzing regional retail market trends. The region should include all surrounding areas that either help (i.e. are complementary) or hinder (i.e. are competitive) retail sales activity within the local Market Areas. The relevant regions shown in **Maps 2, 5, 6 and 7** were identified for this study by an initial survey given to the respective community task force concerning shopping habits and calculating an outer boundary that was within reasonable shopping distance from the center of each study area. Market Centers were again determined by used local knowledge about the competing Market Areas to refine our selection.

Defining Market Area Boundaries: The boundaries for each of the Market Areas were determined based on three main factors: (1) sales for 2005 in each Market Center, (2) distance to the Market Center, and (3) input from the local taskforce. In general, the larger the Market Center, the larger the Market Area that corresponds to the center. Initial boundaries are determined using geographic information systems and then are modified according to feedback from the local taskforce.

Calculating Estimated Actual Retail Sales: Data on retail sales is available for all businesses. (See Data Sources.) Once the Market Areas were determined using the procedure outlined above, sales for each retail sector within each Market Area were calculated by summing up the sales for all businesses that fall within that Market Area.

Estimating Surplus/Leakages: Surplus and leakage calculations were performed for each retail sector within each Market Area. For the purposes of this report, potential sales of retail sector R in Market Area A is defined as:

$$\text{Potential Sales} = (\text{Population of Market Area A}) \times (\text{Income ratio of Market Area A}) \times (\text{Regional per capita consumption of retail good R})$$

- The income ratio is the ratio of per capita income in Market Area A to the regional per capita income. This ratio gives an indication of the relative spending power of residents in Market Area A.
- The regional per capita consumption of retail good R is the total regional sales in retail sector R divided by the population of the region. Because these values are dependent on the geographic extent of the regional boundary, they are relative measures that are specific to each study region.²
- Surplus/leakage numbers are reported in dollars as well as in percentage form. The percentage term is the percentage of the potential sales for the Market Area,

² In other words, the region is defined with the locale of interest as the central point. A study in which one of the other market areas was the focus would generate a different study region with that market area as the Center. As a result, surplus and leakage estimates for the same market area will vary according to the study region that has been defined.

which indicates the size of actual sales relative to the estimated potential sales. For example, a 50% surplus implies that the actual sales are 50% larger than the estimated potential sales and vice versa, a -50% surplus (i.e. a leakage) implies that actual sales are 50% less than potential sales. A -100% surplus results if actual sales are zero.

IX. Data Sources

Estimated retail sales data are compiled by infoUSA, a private market research company that compiles estimates of retail sales data. These data are then geo-coded by GeoResults and extracted using ESRI's ArcView. These data are estimated for 2005, using 4th quarter 2005 data. Several variables are available, including four digit Standard Industry Codes and sales.

1990 and 2000 data on population, housing, income, commuting, and labor force characteristics are from the U.S. Census Bureau's decennial census of housing and population. These data can be accessed at: <http://www.census.gov>. The 2005 estimates and 2010 projections are provided by ESRI.

For an explanation of the retail sectors that comprised this study, please visit: http://www.osha.gov/pls/imis/sic_manual.html.

APPENDIX A- Total Estimated Retail Surplus/Leakage by Market Area in the Pomeroy/Middleport, Ohio Market Region:

Retail Sectors	Athens	Belpre	Charleston	Galipolis	Huntington	Marietta	Parkersburg/Vienna	Pomeroy/Middleport	Ripley
Apparel & Accessory Stores	\$ (6,333,572)	\$ (4,361,206)	\$ 6,978,012	\$ (5,699,043)	\$ 20,402,236	\$ (9,453,491)	\$ 11,210,345	\$ (5,806,000)	\$ (6,936,421)
Bakeries	\$ (1,643,000)	\$ 610,035	\$ (12,357,873)	\$ 253,027	\$ 20,246,189	\$ (1,268,333)	\$ (3,461,412)	\$ (861,697)	\$ (1,409,167)
Books & Office Supplies	\$ 18,124,995	\$ 1,132,705	\$ (14,227,230)	\$ (3,918,283)	\$ 5,134,640	\$ (1,217,700)	\$ 1,586,327	\$ (2,922,701)	\$ (3,692,349)
Camera & Photographic Supply Stores	\$ (250,989)	\$ (76,847)	\$ 1,962,721	\$ (165,234)	\$ (604,791)	\$ (191,520)	\$ (431,433)	\$ (103,711)	\$ (138,182)
Candy Nut & Confectionary Stores	\$ 778,915	\$ (60,037)	\$ (41,624)	\$ (129,089)	\$ (22,493)	\$ (149,625)	\$ (187,057)	\$ (81,024)	\$ (107,955)
Discount Department Stores	\$ (3,585,937)	\$ (3,145,176)	\$ (415,836)	\$ (623,282)	\$ (9,554,136)	\$ (3,770,843)	\$ 25,823,366	\$ (2,445,513)	\$ (2,281,676)
Drinking Establishments	\$ 4,109,527	\$ (228,818)	\$ (2,574,440)	\$ 155,439	\$ (1,505,345)	\$ 157,456	\$ 600,402	\$ 268,839	\$ (1,040,799)
Drug Stores & Proprietary Stores	\$ (24,593,970)	\$ (4,236,570)	\$ 52,744,992	\$ 48,342,713	\$ (13,525,575)	\$ (15,544,016)	\$ (30,422,072)	\$ (2,704,702)	\$ (10,058,967)
Electronics, Music & Videos	\$ 2,946,483	\$ 360,694	\$ 8,222,441	\$ (6,137,988)	\$ (708,426)	\$ (6,132,332)	\$ 11,091,144	\$ (6,314,658)	\$ (3,326,315)
Florists	\$ 1,538,593	\$ (41,198)	\$ (2,016,872)	\$ 227,508	\$ (176,725)	\$ 1,024,084	\$ (403,184)	\$ 70,457	\$ (222,546)
Furniture and Home Furnishings	\$ (9,558,459)	\$ (4,516,023)	\$ (3,204,045)	\$ 19,664,191	\$ (4,499,400)	\$ 5,605,964	\$ 2,880,594	\$ (1,559,376)	\$ (4,812,423)
Gasoline Service Stations	\$ (5,592,936)	\$ (244,358)	\$ (71,685,853)	\$ 46,447,000	\$ 14,719,146	\$ (4,439,005)	\$ 10,596,354	\$ 8,524,001	\$ 1,677,301
Gift Novelty & Souvenir Shops	\$ (189,691)	\$ 38,302	\$ 1,390,364	\$ (914,303)	\$ 364,132	\$ 59,157	\$ (56,561)	\$ 2,138	\$ (693,334)
Grand Total	\$ (267,168,860)	\$ (119,488,430)	\$ (92,926,516)	\$ 47,304,790	\$ 332,741,706	\$ 16,744,157	\$ 152,325,467	\$ (77,980,050)	\$ 8,296,159
Grocery Store	\$ (31,687,365)	\$ 3,484,636	\$ (6,703,069)	\$ (20,048,842)	\$ 55,653,452	\$ 7,504,812	\$ (40,356,985)	\$ 31,171,959	\$ 987,180
Hardware Stores	\$ 2,256,706	\$ 3,478,604	\$ (7,386,987)	\$ 3,686,192	\$ (5,559,766)	\$ (66,428)	\$ (2,414,765)	\$ 3,974,204	\$ 2,032,448
Hobby Toy & Game Shops	\$ (3,627,828)	\$ (1,334,139)	\$ (5,090,532)	\$ (2,527,093)	\$ 12,048,873	\$ (1,635,358)	\$ 5,288,513	\$ (1,231,985)	\$ (1,890,152)
Household Appliance Stores	\$ (3,271,598)	\$ (1,535,657)	\$ 3,033,706	\$ (1,339,932)	\$ 4,046,257	\$ (3,391,199)	\$ 1,188,522	\$ 761,509	\$ 508,666
Jewelry Stores	\$ (1,615,654)	\$ (1,402,181)	\$ (3,031,353)	\$ (518,936)	\$ 3,316,722	\$ (998,548)	\$ 6,479,880	\$ (332,355)	\$ (1,897,325)
Liquor Stores	\$ 5,131,004	\$ (242,058)	\$ (6,559,090)	\$ 3,219,712	\$ (2,946,934)	\$ 4,487,009	\$ (1,323,388)	\$ (111,692)	\$ (1,654,398)
Lumber and Other Building Materials	\$ (40,420,696)	\$ (14,297,173)	\$ (7,686,262)	\$ (4,599,760)	\$ 91,040,532	\$ 1,931,453	\$ 61,395	\$ (13,723,006)	\$ (12,303,306)
Miscellaneous Retail	\$ (5,678,568)	\$ (2,612,310)	\$ (17,842,907)	\$ (2,853,381)	\$ 18,117,099	\$ 4,316,605	\$ 13,498,352	\$ (694,436)	\$ (6,249,527)
Mobile Home Dealers	\$ 407,093	\$ (1,458,901)	\$ 9,677,322	\$ 2,897,105	\$ 155,328	\$ (3,635,908)	\$ (7,328,559)	\$ (1,968,904)	\$ 1,255,684
Motor Vehicles & Supplies	\$ (86,673,285)	\$ (46,680,899)	\$ 134,117,162	\$ (33,951,424)	\$ (82,046,010)	\$ 34,577,684	\$ 54,078,754	\$ (62,473,057)	\$ 89,064,376
Non-Discount Department Stores	\$ (85,209,321)	\$ (31,297,122)	\$ (108,336,367)	\$ 20,023,668	\$ 143,137,088	\$ (563,420)	\$ 79,441,796	\$ 2,150,036	\$ (19,340,772)
Optical Goods Stores	\$ (1,486,139)	\$ (110,020)	\$ (568,472)	\$ (518,374)	\$ 3,778,952	\$ (444,012)	\$ 320,426	\$ (614,086)	\$ (358,193)
Recreational Vehicle Dealers	\$ 2,146,328	\$ 1,069,819	\$ 529,108	\$ (3,064,702)	\$ (1,038,034)	\$ 634,998	\$ 2,811,173	\$ (5,125,945)	\$ 2,037,975
Restaurants	\$ 8,616,694	\$ (9,262,996)	\$ (23,275,125)	\$ (11,224,039)	\$ 48,405,818	\$ 1,689,979	\$ 10,234,293	\$ (13,783,196)	\$ (11,643,051)
Retail Nurseries & Lawn Supply Stores	\$ (794,070)	\$ (427,797)	\$ (6,882,793)	\$ 3,089,613	\$ 4,768,280	\$ 960,934	\$ (947,570)	\$ 138,267	\$ 95,260
Shoe Stores	\$ (1,178,732)	\$ (978,151)	\$ (2,521,367)	\$ (87,197)	\$ 1,949,873	\$ 1,594,230	\$ 2,860,469	\$ (168,093)	\$ (1,470,857)
Sporting Goods & Bicycle Shops	\$ 943,372	\$ (637,609)	\$ (7,784,923)	\$ (1,048,877)	\$ 8,164,407	\$ 2,776,940	\$ 131,095	\$ (1,683,318)	\$ (860,767)
Used Merchandise Stores	\$ 116,193	\$ 241,988	\$ (2,360,743)	\$ 212,162	\$ 1,842,794	\$ 1,313,932	\$ (413,925)	\$ (509,048)	\$ (443,238)
Variety and General Merchandise	\$ (892,955)	\$ (717,969)	\$ 971,421	\$ (1,543,761)	\$ (2,362,477)	\$ 1,010,660	\$ (110,821)	\$ 177,043	\$ 3,468,987
Grand Total	\$ (534,337,720)	\$ (238,976,860)	\$ (185,853,032)	\$ 94,609,579	\$ 665,483,412	\$ 33,488,315	\$ 304,650,934	\$ (155,960,100)	\$ 16,592,319

*Highlighted numbers represent surplus retail sector within each market area