



MEMORANDUM

TO: Trustee Johnston, Chairperson
Economic and Community Development Committee

FROM: Jennifer Ganser, AICP
Assistant Director of Community Development

DATE: March 11, 2019

SUBJECT: Leakage and Retail Analysis

Staff obtained the 2019 Retail Market Power Report thru Choose DuPage and it was prepared by Environics Analytics. The report shows an opportunity gap or surplus for different industries (by NAICS Code). There is a column for demand and supply in the geographic location assigned to the report. The last column shows the gap or surplus. When supply is greater than demand, the difference is negative (noted in red) and there is a surplus.

Lombard has a surplus in many clothing categories due to Yorktown Mall. People from outside Lombard come into Lombard to shop at Yorktown Mall. We also have a surplus in furniture stores, grocery stores, and restaurants.

When demand is greater than supply, the difference is positive and there is an opportunity gap. A gap can also be called a leakage. There is a potential opportunity in these categories for growth. In these categories residents are leaving Lombard to shop elsewhere, which can impact sales tax dollars collected by the Village. There is a gap in building material stores and gas stations.

Overall, Lombard has a surplus (\$5,658,277). This should not be interpreted that no more retail is needed in Lombard.

COMMITTEE ACTION REQUESTED

This item is being placed on the March 11, 2019 ECDC agenda for review. No action is required.

Retail Market Power® | Opportunity Gap by Retail Store Types

Trade Area: 60148 (Lombard, IL)

	2019 Demand (\$)	2019 Supply (\$)	Opportunity Gap/Surplus (\$)
Totals			
Total retail trade including food and drink (NAICS 44, 45 and 722)	1,144,017,870	1,781,557,920	-637,540,050
Total retail trade (NAICS 44 and 45)	1,010,325,212	1,586,275,707	-575,950,495
Motor Vehicle and Parts Dealers			
Motor vehicle and parts dealers (NAICS 441)	231,779,201	381,743,856	-149,964,655
Automobile dealers (NAICS 4411)	196,687,801	371,622,412	-174,934,611
New car dealers (NAICS 44111)	178,348,664	338,312,031	-159,963,367
Used car dealers (NAICS 44112)	18,339,136	33,310,380	-14,971,244
Other motor vehicle dealers (NAICS 4412)	17,789,405	751,715	17,037,689
Recreational vehicle dealers (NAICS 44121)	5,489,916	6,041	5,483,875
Motorcycle, boat, and other motor vehicle dealers (NAICS 44122)	12,299,488	745,674	11,553,814
Boat dealers (NAICS 441222)	4,218,615	0	4,218,615
Motorcycle, ATV, and all other motor vehicle dealers (NAICS 441228)	8,080,874	745,674	7,335,199
Automotive parts, accessories, and tire stores (NAICS 4413)	17,301,995	9,369,729	7,932,266
Automotive parts and accessories stores (NAICS 44131)	10,331,191	6,903,770	3,427,421
Tire dealers (NAICS 44132)	6,970,804	2,465,959	4,504,845
Furniture and Home Furnishings Stores			
Furniture and home furnishings stores (NAICS 442)	29,602,472	67,987,184	-38,384,712
Furniture stores (NAICS 4421)	13,717,886	48,881,093	-35,163,208
Home furnishings stores (NAICS 4422)	15,884,587	19,106,091	-3,221,504
Floor covering stores (NAICS 44221)	8,230,019	5,246,099	2,983,919
Other home furnishings stores (NAICS 44229)	7,654,568	13,859,991	-6,205,423
Window treatment stores (NAICS 442291)	342,846	7	342,839
All other home furnishings stores (NAICS 442299)	7,311,722	13,859,985	-6,548,263
Electronics and Appliance Stores			
Electronics and appliance stores (NAICS 443)	18,443,284	30,411,693	-11,968,408
Household appliance stores (NAICS 443141)	2,665,173	6,904,660	-4,239,487
Electronics stores (NAICS 443142)	15,778,112	23,507,033	-7,728,921
Building Material and Garden Equipment and Supplies Dealers			
Building material and garden equipment and supplies dealers (NAICS 444)	80,381,617	44,910,336	35,471,280
Building material and supplies dealers (NAICS 4441)	69,625,884	37,627,281	31,998,602
Home centers (NAICS 44411)	39,011,233	21,914,730	17,096,503
Paint and wallpaper stores (NAICS 44412)	1,753,873	1,337,056	416,817
Hardware stores (NAICS 44413)	5,667,388	2,505,166	3,162,222
Other building material dealers (NAICS 44419)	23,193,389	11,870,329	11,323,060
Lawn and garden equipment and supplies stores (NAICS 4442)	10,755,733	7,283,055	3,472,678
Outdoor power equipment stores (NAICS 44421)	1,614,375	1,589,470	24,905
Nursery, garden center, and farm supply stores (NAICS 44422)	9,141,358	5,693,585	3,447,773
Food and Beverage Stores			
Food and beverage stores (NAICS 445)	132,878,875	203,686,782	-70,807,907
Grocery stores (NAICS 4451)	117,394,516	173,402,258	-56,007,742
Supermarkets and other grocery (except convenience) stores (NAICS 44511)	111,956,433	160,064,566	-48,108,133
Convenience stores (NAICS 44512)	5,438,083	13,337,692	-7,899,608
Specialty food stores (NAICS 4452)	4,087,478	21,939,398	-17,851,920
Meat markets (NAICS 44521)	1,339,712	776	1,338,936
Fish and seafood markets (NAICS 44522)	491,530	3,728,703	-3,237,173
Fruit and vegetable markets (NAICS 44523)	837,163	4,538,017	-3,700,853
Other specialty food stores (NAICS 44529)	1,419,072	13,671,902	-12,252,830
Baked goods stores and confectionery and nut stores (NAICS 445291 + 445292)	761,033	9,693,669	-8,932,636
All other specialty food stores (NAICS 445299)	658,039	3,978,233	-3,320,193
Beer, wine, and liquor stores (NAICS 4453)	11,396,881	8,345,126	3,051,755
Health and Personal Care Stores			
Health and personal care stores (NAICS 446)	67,072,096	85,805,965	-18,733,869
Pharmacies and drug stores (NAICS 44611)	54,850,023	72,984,544	-18,134,521
Cosmetics, beauty supplies, and perfume stores (NAICS 44612)	4,203,815	5,140,125	-936,310
Optical goods stores (NAICS 44613)	3,370,845	4,813,687	-1,442,841
Other health and personal care stores (NAICS 44619)	4,647,413	2,867,609	1,779,803
Food (health) supplement stores (NAICS 446191)	1,683,524	1,796	1,681,728
All other health and personal care stores (NAICS 446199)	2,963,889	2,865,814	98,075
Gasoline Stations			
Gasoline stations (NAICS 447)	93,873,660	64,562,195	29,311,465

Benchmark: USA

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Retail Market Power® | Opportunity Gap by Retail Store Types



Trade Area: 60148 (Lombard, IL)

	2019 Demand (\$)	2019 Supply (\$)	Opportunity Gap/Surplus (\$)
Clothing and Clothing Accessories Stores			
Clothing and clothing accessories stores (NAICS 448)	48,997,399	129,008,258	-80,010,859
Clothing stores (NAICS 4481)	34,978,382	102,735,869	-67,757,487
Men's clothing stores (NAICS 44811)	1,622,598	418,485	1,204,113
Women's clothing stores (NAICS 44812)	6,856,310	13,277,980	-6,421,670
Children's and infants' clothing stores (NAICS 44813)	1,916,169	8,019,298	-6,103,128
Family clothing stores (NAICS 44814)	20,189,510	63,425,293	-43,235,782
Clothing accessories stores (NAICS 44815)	1,866,506	9,419,083	-7,552,577
Other clothing stores (NAICS 44819)	2,527,287	8,175,730	-5,648,442
Shoe stores (NAICS 4482)	6,208,664	10,640,915	-4,432,250
Jewelry, luggage, and leather goods stores (NAICS 4483)	7,810,353	15,631,475	-7,821,121
Jewelry stores (NAICS 44831)	7,256,769	15,516,543	-8,259,774
Luggage and leather goods stores (NAICS 44832)	553,584	114,932	438,652
Sporting Goods, Hobby, Musical Instrument, and Book Stores			
Sporting goods, hobby, musical instrument, and book stores (NAICS 451)	15,737,898	22,522,778	-6,784,880
Sporting goods, hobby, and musical instrument stores (NAICS 4511)	13,832,121	21,948,732	-8,116,611
Sporting goods stores (NAICS 45111)	8,398,545	11,687,806	-3,289,261
Hobby, toy, and game stores (NAICS 45112)	3,891,900	9,020,824	-5,128,924
Sewing, needlework, and piece goods stores (NAICS 45113)	767,606	949,090	-181,484
Musical instrument and supplies stores (NAICS 45114)	774,070	291,011	483,059
Book stores and news dealers (NAICS 4512)	1,905,777	574,046	1,331,731
Book stores (NAICS 45121)	1,742,628	573,691	1,168,937
News dealers and newsstands (NAICS 451212)	163,149	356	162,793
General Merchandise Stores			
General merchandise stores (NAICS 452)	133,004,856	210,867,126	-77,862,269
Department stores (NAICS 4522)	28,532,107	141,556,384	-113,024,277
Other general merchandise stores (NAICS 4523)	104,472,750	69,310,742	35,162,008
Warehouse clubs and supercenters (NAICS 452311)	88,267,704	64,657,854	23,609,850
All other general merchandise stores (NAICS 452319)	16,205,046	4,652,887	11,552,158
Miscellaneous Store Retailers			
Miscellaneous store retailers (NAICS 453)	24,355,570	30,971,667	-6,616,097
Florists (NAICS 4531)	1,307,807	475,471	832,336
Office supplies, stationery, and gift stores (NAICS 4532)	4,958,904	7,313,599	-2,354,695
Office supplies and stationery stores (NAICS 45321)	2,122,969	4,805,042	-2,682,074
Gift, novelty, and souvenir stores (NAICS 45322)	2,835,935	2,508,556	327,379
Used merchandise stores (NAICS 4533)	4,058,694	3,226,340	832,354
Other miscellaneous store retailers (NAICS 4539)	14,030,165	19,956,257	-5,926,092
Pet and pet supplies stores (NAICS 45391)	4,587,619	13,194,643	-8,607,024
Art dealers (NAICS 45392)	1,925,489	30	1,925,458
Manufactured (mobile) home dealers (NAICS 45393)	1,026,840	30	1,026,810
All other miscellaneous store retailers (NAICS 45399)	6,490,217	6,761,553	-271,336
Tobacco stores (NAICS 453991)	2,198,408	3,645,986	-1,447,578
All other miscellaneous store retailers (except tobacco stores) (NAICS 453998)	4,291,809	3,115,568	1,176,241
Non-store Retailers			
Non-store retailers (NAICS 454)	134,198,284	313,797,867	-179,599,584
Electronic shopping and mail-order houses (NAICS 4541)	113,698,231	247,229,816	-133,531,586
Vending machine operators (NAICS 4542)	1,576,067	14	1,576,053
Direct selling establishments (NAICS 4543)	18,923,987	66,568,037	-47,644,051
Fuel dealers (NAICS 45431)	9,609,240	5,854,419	3,754,821
Other direct selling establishments (NAICS 45439)	9,314,746	60,713,618	-51,398,872
Food Services and Drinking Places			
Food services and drinking places (NAICS 722)	133,692,658	195,282,213	-61,589,555
Special food services (NAICS 7223)	10,955,493	18,466,525	-7,511,032
Food service contractors (NAICS 72231)	8,925,215	15,917,800	-6,992,584
Caterers (NAICS 72232)	1,866,409	2,539,906	-673,497
Mobile food services (NAICS 72233)	163,869	8,819	155,050
Drinking places (alcoholic beverages) (NAICS 7224)	6,932,110	4,606,996	2,325,114
Restaurants and other eating places (NAICS 7225)	115,805,055	172,208,693	-56,403,637
Full-service restaurants (NAICS 722511)	60,012,858	78,312,019	-18,299,160
Limited-service restaurants (NAICS 722513)	46,144,960	86,813,363	-40,668,403
Cafeterias, grill buffets, and buffets (NAICS 722514)	1,721,635	1,612,470	109,165
Snack and non-alcoholic beverage bars (NAICS 722515)	7,925,602	5,470,841	2,454,761
Ice cream, soft serve and frozen yogurt shops (NAICS 7225151C + 7225152)	1,209,253	1,124,367	84,886
Doughnut shops (NAICS 7225153)	1,248,527	731,661	516,866
Bagel shops (NAICS 7225154)	360,814	68	360,747
Coffee shops (NAICS 7225155)	3,384,615	2,737,640	646,975
Cookie shops (NAICS 7225156)	54,902	44	54,858
Other snack and non-alcoholic beverage bars (NAICS 7225157)	1,667,489	877,061	790,428

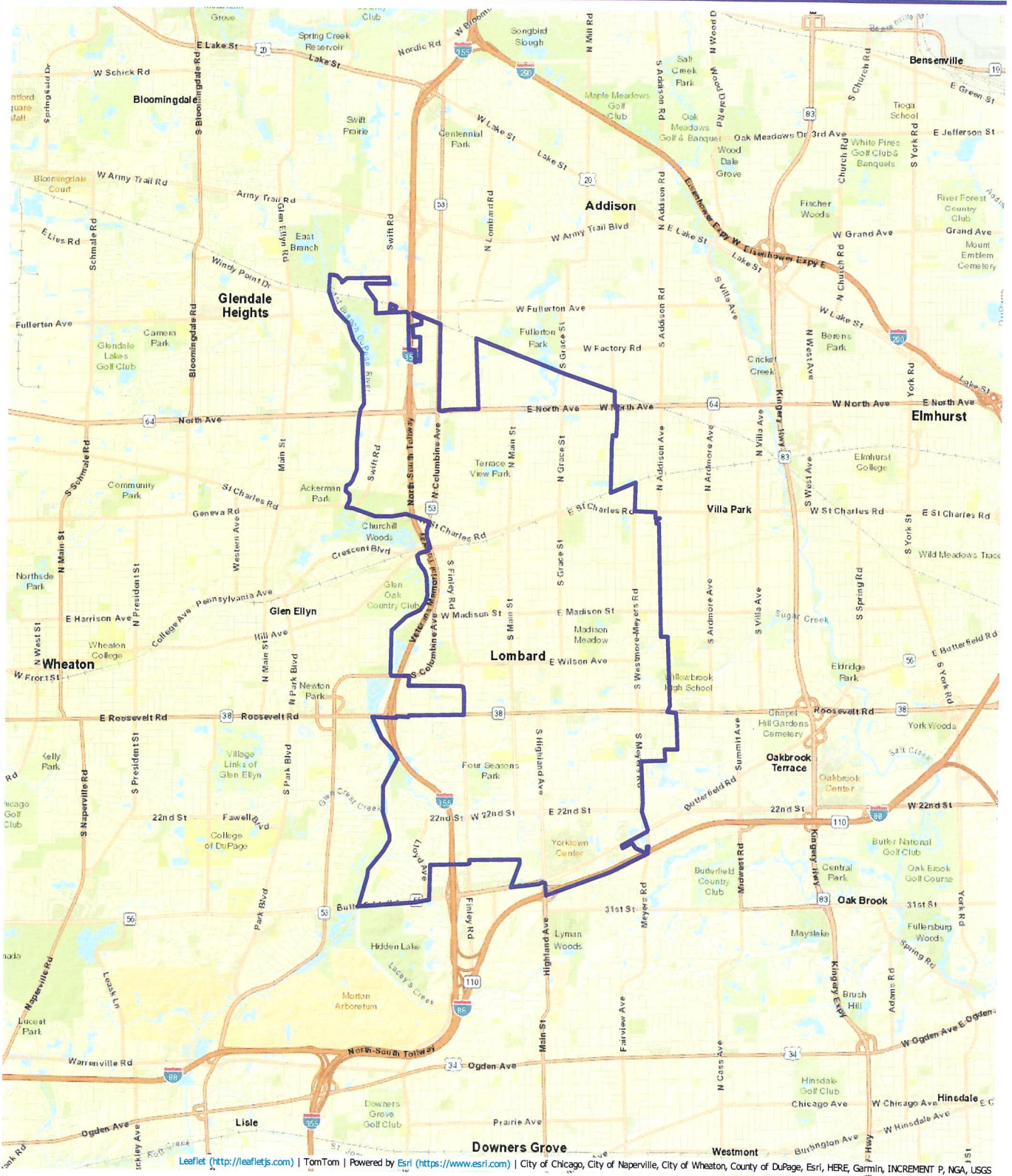
Benchmark: USA

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Trade Area: 60148 (Lombard, IL)



Benchmark: USA

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Report Details

Name: Retail Market Power® Opportunity Gap by Retail Store Types 2019
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DataVintage: 2019

Trade Area

Name	Level	Geographies
60148 (Lombard, IL)	ZIP Code	60148 (Lombard, IL)

Benchmark:

Name	Level	Geographies
USA	Entire US	United States

DataSource:

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