



Financial Expenditures

Shoppes at Forest Green
10023 Forest Green Blvd, Louisville, Kentucky, 40223
Ring: 1 mile radius

Prepared by Charlotte Hollkamp
Latitude: 38.26339
Longitude: -85.57101

Demographic Summary		2019	2024
Population		9,526	9,928
Households		3,760	3,916
Families		2,622	2,719
Median Age		43.6	44.7
Median Household Income		\$94,715	\$106,702
		Spending Potential Index	Average Amount
			Total
Assets			
Value of Checking/Savings/Money Market Accounts & CDs	154	\$26,451.43	\$99,457,359
Value of Checking/Savings/Money Market Accounts & CDs (1 year ago)	155	\$24,141.75	\$90,772,987
Value of Stocks/Bonds/Mutual Funds	167	\$35,774.87	\$134,513,496
Value of Stocks/Bonds/Mutual Funds (1 year ago)	166	\$33,319.65	\$125,281,893
Value of Other Financial Assets	157	\$8,925.69	\$33,560,602
Value of Other Financial Assets (1 year ago)	157	\$8,152.72	\$30,654,241
Value of Retirement Plans	165	\$156,801.27	\$589,572,792
Value of Retirement Plans (1 year ago)	164	\$139,780.61	\$525,575,089
Surrender Value of Whole Life Policies	146	\$8,283.00	\$31,144,084
Surrender Value of Whole Life Policies (1 year ago)"	151	\$6,848.54	\$25,750,508
Earnings			
Interest/Dividends	166	\$1,791.75	\$6,736,983
Royalty/Estate/Trust Income	179	\$842.66	\$3,168,395
Liabilities			
Original Mortgage Amount (Owned Home)	154	\$17,377.46	\$65,339,240
Vehicle Loan Amount (1)	133	\$3,793.56	\$14,263,800
Value of Credit Card Debt	141	\$3,457.54	\$13,000,362
Value of Credit Card Debt (1 year ago)	143	\$3,301.59	\$12,413,975
Value Owed on Student Loans	127	\$8,341.15	\$31,362,717
Value Owed on Student Loans (1 year ago)	128	\$7,842.23	\$29,486,781
Value Owed on Non-student Loans	121	\$1,134.46	\$4,265,562
Value Owed on Non-student Loans (1 year ago)	113	\$795.65	\$2,991,659
Owned Dwellings - Special Lump Sum Mortgage Payments	155	\$462.47	\$1,738,898
Owned Dwellings - Special Assessments	150	\$20.88	\$78,509
Owned Dwellings - Property Purchase Closing Costs	143	\$352.54	\$1,325,556
Amount Paid: Interest			
Home Mortgage	154	\$5,852.12	\$22,003,976
Home Equity Loan	156	\$56.06	\$210,780
Home Equity Line of Credit	160	\$179.10	\$673,403
New Car/Truck/Van Loan	136	\$181.43	\$682,180
Used Car/Truck/Van Loan	126	\$161.78	\$608,293
Finance/Late/Interest Charges for Credit Cards	139	\$133.36	\$501,419
Finance/Late/Interest Charges for Student Loans	129	\$57.70	\$216,948
Finance/Late/Interest Charges for Non-student Loans	139	\$14.75	\$55,447
Amount Paid: Principal			
Home Mortgage	154	\$2,956.92	\$11,118,028
Home Equity Loan	157	\$101.51	\$381,681
Home Equity Line of Credit	161	\$574.51	\$2,160,154
New Car/Truck/Van Loan	138	\$1,504.29	\$5,656,126
Used Car/Truck/Van Loan	126	\$1,171.68	\$4,405,520
Checking Account and Banking Service Charges	122	\$42.23	\$158,769

Data Note: The Spending Potential Index (SPI) is household-based, and represents the amount spent for a product or service relative to a national average of 100.

(1) **Vehicle Loan Amount** is the amount of a loan for a car, truck, van, SUV, motor home, boat, camper, motorcycle, motor scooter, moped, plane, snowmobile, dune buggy, ATV, or Segway, excluding interest.

Source: Esri forecasts for 2019 and 2024; Consumer Spending data are derived from the 2016 and 2017 Consumer Expenditure Surveys, Bureau of Labor Statistics.

December 31, 2019



Financial Expenditures

Shoppes at Forest Green
10023 Forest Green Blvd, Louisville, Kentucky, 40223
Ring: 3 mile radius

Prepared by Charlotte Hollkamp
Latitude: 38.26339
Longitude: -85.57101

Demographic Summary		2019	2024
Population		73,725	76,292
Households		32,554	33,664
Families		19,151	19,698
Median Age		43.1	43.8
Median Household Income		\$78,327	\$90,268
	Spending Potential Index	Average Amount	Total
Assets			
Value of Checking/Savings/Money Market Accounts & CDs	127	\$21,833.45	\$710,766,050
Value of Checking/Savings/Money Market Accounts & CDs (1 year ago)	127	\$19,754.13	\$643,076,037
Value of Stocks/Bonds/Mutual Funds	134	\$28,687.25	\$933,884,626
Value of Stocks/Bonds/Mutual Funds (1 year ago)	134	\$26,778.76	\$871,755,797
Value of Other Financial Assets	129	\$7,314.38	\$238,112,325
Value of Other Financial Assets (1 year ago)	129	\$6,701.83	\$218,171,280
Value of Retirement Plans	129	\$122,517.81	\$3,988,444,730
Value of Retirement Plans (1 year ago)	128	\$109,206.55	\$3,555,109,930
Surrender Value of Whole Life Policies	121	\$6,844.04	\$222,800,774
Surrender Value of Whole Life Policies (1 year ago)"	124	\$5,637.16	\$183,512,185
Earnings			
Interest/Dividends	130	\$1,398.44	\$45,524,953
Royalty/Estate/Trust Income	141	\$662.02	\$21,551,331
Liabilities			
Original Mortgage Amount (Owned Home)	122	\$13,806.55	\$449,458,585
Vehicle Loan Amount (1)	118	\$3,370.56	\$109,725,242
Value of Credit Card Debt	121	\$2,957.72	\$96,285,717
Value of Credit Card Debt (1 year ago)	122	\$2,804.49	\$91,297,289
Value Owed on Student Loans	124	\$8,147.88	\$265,246,062
Value Owed on Student Loans (1 year ago)	124	\$7,608.97	\$247,702,534
Value Owed on Non-student Loans	112	\$1,050.17	\$34,187,082
Value Owed on Non-student Loans (1 year ago)	107	\$754.95	\$24,576,743
Owned Dwellings - Special Lump Sum Mortgage Payments	121	\$359.60	\$11,706,546
Owned Dwellings - Special Assessments	134	\$18.67	\$607,866
Owned Dwellings - Property Purchase Closing Costs	120	\$296.02	\$9,636,562
Amount Paid: Interest			
Home Mortgage	120	\$4,569.89	\$148,768,227
Home Equity Loan	121	\$43.62	\$1,419,857
Home Equity Line of Credit	121	\$135.45	\$4,409,308
New Car/Truck/Van Loan	116	\$155.73	\$5,069,743
Used Car/Truck/Van Loan	117	\$149.86	\$4,878,701
Finance/Late/Interest Charges for Credit Cards	118	\$113.04	\$3,679,968
Finance/Late/Interest Charges for Student Loans	119	\$53.46	\$1,740,407
Finance/Late/Interest Charges for Non-student Loans	125	\$13.18	\$429,182
Amount Paid: Principal			
Home Mortgage	119	\$2,289.21	\$74,522,919
Home Equity Loan	121	\$78.37	\$2,551,273
Home Equity Line of Credit	119	\$426.28	\$13,877,054
New Car/Truck/Van Loan	117	\$1,271.60	\$41,395,745
Used Car/Truck/Van Loan	117	\$1,083.04	\$35,257,125
Checking Account and Banking Service Charges	119	\$41.46	\$1,349,682

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Source: Esri forecasts for 2019 and 2024; Consumer Spending data are derived from the 2016 and 2017 Consumer Expenditure Surveys, Bureau of Labor Statistics.

December 31, 2019



Financial Expenditures

Shoppes at Forest Green
10023 Forest Green Blvd, Louisville, Kentucky, 40223
Ring: 5 mile radius

Prepared by Charlotte Hollkamp
Latitude: 38.26339
Longitude: -85.57101

Demographic Summary		2019	2024
Population		189,101	196,232
Households		81,527	84,571
Families		49,564	51,181
Median Age		42.1	42.9
Median Household Income		\$81,837	\$94,808
		Spending Potential Index	Average Amount
			Total
Assets			
Value of Checking/Savings/Money Market Accounts & CDs	132	\$22,599.95	\$1,842,506,416
Value of Checking/Savings/Money Market Accounts & CDs (1 year ago)	132	\$20,467.56	\$1,668,658,950
Value of Stocks/Bonds/Mutual Funds	138	\$29,689.57	\$2,420,501,831
Value of Stocks/Bonds/Mutual Funds (1 year ago)	138	\$27,704.55	\$2,258,668,791
Value of Other Financial Assets	132	\$7,519.13	\$613,012,189
Value of Other Financial Assets (1 year ago)	132	\$6,877.95	\$560,738,903
Value of Retirement Plans	135	\$128,225.46	\$10,453,836,727
Value of Retirement Plans (1 year ago)	134	\$114,130.12	\$9,304,686,074
Surrender Value of Whole Life Policies	128	\$7,238.93	\$590,168,570
Surrender Value of Whole Life Policies (1 year ago)"	130	\$5,933.29	\$483,723,545
Earnings			
Interest/Dividends	135	\$1,451.64	\$118,347,463
Royalty/Estate/Trust Income	144	\$680.06	\$55,443,110
Liabilities			
Original Mortgage Amount (Owned Home)	130	\$14,754.67	\$1,202,903,756
Vehicle Loan Amount (1)	123	\$3,524.67	\$287,355,610
Value of Credit Card Debt	126	\$3,082.48	\$251,305,392
Value of Credit Card Debt (1 year ago)	127	\$2,923.81	\$238,369,224
Value Owed on Student Loans	127	\$8,298.78	\$676,574,373
Value Owed on Student Loans (1 year ago)	127	\$7,762.13	\$632,823,526
Value Owed on Non-student Loans	115	\$1,080.85	\$88,118,227
Value Owed on Non-student Loans (1 year ago)	110	\$774.10	\$63,109,911
Owned Dwellings - Special Lump Sum Mortgage Payments	128	\$382.45	\$31,179,942
Owned Dwellings - Special Assessments	139	\$19.34	\$1,576,403
Owned Dwellings - Property Purchase Closing Costs	127	\$313.23	\$25,536,589
Amount Paid: Interest			
Home Mortgage	129	\$4,897.59	\$399,285,582
Home Equity Loan	128	\$45.96	\$3,747,296
Home Equity Line of Credit	128	\$143.37	\$11,688,707
New Car/Truck/Van Loan	123	\$164.52	\$13,412,710
Used Car/Truck/Van Loan	121	\$155.38	\$12,667,594
Finance/Late/Interest Charges for Credit Cards	123	\$117.90	\$9,611,993
Finance/Late/Interest Charges for Student Loans	123	\$55.10	\$4,491,789
Finance/Late/Interest Charges for Non-student Loans	130	\$13.75	\$1,120,750
Amount Paid: Principal			
Home Mortgage	128	\$2,449.31	\$199,684,756
Home Equity Loan	128	\$82.87	\$6,756,488
Home Equity Line of Credit	128	\$456.03	\$37,178,931
New Car/Truck/Van Loan	124	\$1,345.15	\$109,666,076
Used Car/Truck/Van Loan	121	\$1,122.48	\$91,512,433
Checking Account and Banking Service Charges	121	\$42.02	\$3,425,384

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