



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		2017	2022
Population		9,311	9,721
Households		3,675	3,840
Families		2,566	2,667
Median Age		43.3	44.5
Median Household Income		\$79,998	\$86,024
	Spending Potential Index	Average Amount Spent	Total
Assets			
Value of Checking/Savings/Money Market Accounts & CDs	159	\$6,297.00	\$23,141,457
Value of Checking/Savings/Money Market Accounts & CDs (1 year ago)	162	\$5,863.85	\$21,549,644
Value of Stocks/Bonds/Mutual Funds	174	\$10,772.37	\$39,588,452
Value of Stocks/Bonds/Mutual Funds (1 year ago)	174	\$9,850.38	\$36,200,143
Value of Other Financial Assets	158	\$2,050.83	\$7,536,809
Value of Other Financial Assets (1 year ago)	158	\$1,898.16	\$6,975,745
Value of Retirement Plans	169	\$41,009.11	\$150,708,467
Value of Retirement Plans (1 year ago)	168	\$38,200.34	\$140,386,250
Surrender Value of Whole Life Policies	155	\$2,325.90	\$8,547,700
Surrender Value of Whole Life Policies (1 year ago)"	153	\$1,860.16	\$6,836,070
Earnings			
Interest/Dividends	172	\$1,871.28	\$6,876,962
Royalty/Estate/Trust Income	170	\$696.52	\$2,559,706
Liabilities			
Original Mortgage Amount (Owned Home)	161	\$17,613.47	\$64,729,504
Vehicle Loan Amount (1)	135	\$3,686.17	\$13,546,659
Value of Credit Card Debt	148	\$866.51	\$3,184,434
Value of Credit Card Debt (1 year ago)	150	\$829.91	\$3,049,937
Value Owed on Student Loans	128	\$1,872.24	\$6,880,475
Value Owed on Student Loans (1 year ago)	130	\$1,764.98	\$6,486,319
Value Owed on Non-student Loans	123	\$256.53	\$942,740
Value Owed on Non-student Loans (1 year ago)	119	\$187.62	\$689,487
Amount Paid: Interest			
Home Mortgage	160	\$5,806.05	\$21,337,219
Lump Sum Home Equity Loan	171	\$90.68	\$333,252
New Car/Truck/Van Loan	143	\$181.71	\$667,801
Used Car/Truck/Van Loan	132	\$172.70	\$634,670
Finance/Late/Interest Charges for Credit Cards	148	\$125.49	\$461,169
Finance/Late/Interest Charges for Student Loans	140	\$60.53	\$222,440
Finance/Late/Interest Charges for Non-student Loans	140	\$16.05	\$59,001
Amount Paid: Principal			
Home Mortgage	161	\$3,115.69	\$11,450,159
Lump Sum Home Equity Loan	168	\$139.75	\$513,583
New Car/Truck/Van Loan	147	\$1,419.39	\$5,216,256
Used Car/Truck/Van Loan	132	\$1,065.86	\$3,917,024
Checking Account and Banking Service Charges	132	\$46.10	\$169,411

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. Detail may not sum to totals due to rounding.

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

Source: Esri forecasts for 2017 and 2022; Consumer Spending data are derived from the 2014 and 2015 Consumer Expenditure Surveys, Bureau of Labor Statistics.

January 23, 2018



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		2017	2022
Population		71,886	73,565
Households		31,710	32,445
Families		18,722	19,010
Median Age		42.6	43.3
Median Household Income		\$67,922	\$76,615
	Spending Potential Index	Average Amount Spent	Total
Assets			
Value of Checking/Savings/Money Market Accounts & CDs	125	\$4,963.15	\$157,381,584
Value of Checking/Savings/Money Market Accounts & CDs (1 year ago)	126	\$4,582.58	\$145,313,658
Value of Stocks/Bonds/Mutual Funds	132	\$8,176.80	\$259,286,182
Value of Stocks/Bonds/Mutual Funds (1 year ago)	132	\$7,476.98	\$237,094,880
Value of Other Financial Assets	127	\$1,645.24	\$52,170,646
Value of Other Financial Assets (1 year ago)	127	\$1,519.04	\$48,168,891
Value of Retirement Plans	126	\$30,577.16	\$969,601,705
Value of Retirement Plans (1 year ago)	126	\$28,510.98	\$904,083,261
Surrender Value of Whole Life Policies	120	\$1,809.28	\$57,372,225
Surrender Value of Whole Life Policies (1 year ago)"	120	\$1,465.92	\$46,484,285
Earnings			
Interest/Dividends	130	\$1,409.07	\$44,681,669
Royalty/Estate/Trust Income	131	\$539.09	\$17,094,587
Liabilities			
Original Mortgage Amount (Owned Home)	122	\$13,404.54	\$425,058,047
Vehicle Loan Amount (1)	117	\$3,176.94	\$100,740,761
Value of Credit Card Debt	121	\$706.74	\$22,410,645
Value of Credit Card Debt (1 year ago)	121	\$671.41	\$21,290,474
Value Owed on Student Loans	127	\$1,848.68	\$58,621,621
Value Owed on Student Loans (1 year ago)	126	\$1,719.20	\$54,515,823
Value Owed on Non-student Loans	111	\$231.24	\$7,332,478
Value Owed on Non-student Loans (1 year ago)	108	\$170.92	\$5,419,862
Amount Paid: Interest			
Home Mortgage	121	\$4,370.39	\$138,585,055
Lump Sum Home Equity Loan	125	\$66.32	\$2,103,080
New Car/Truck/Van Loan	119	\$150.73	\$4,779,776
Used Car/Truck/Van Loan	117	\$153.28	\$4,860,371
Finance/Late/Interest Charges for Credit Cards	123	\$104.28	\$3,306,810
Finance/Late/Interest Charges for Student Loans	126	\$54.64	\$1,732,564
Finance/Late/Interest Charges for Non-student Loans	119	\$13.68	\$433,671
Amount Paid: Principal			
Home Mortgage	120	\$2,329.69	\$73,874,392
Lump Sum Home Equity Loan	123	\$102.55	\$3,251,764
New Car/Truck/Van Loan	119	\$1,155.16	\$36,630,202
Used Car/Truck/Van Loan	117	\$939.21	\$29,782,233
Checking Account and Banking Service Charges	121	\$42.31	\$1,341,509

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January 23, 2018



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		2017	2022
Population		183,983	189,697
Households		79,284	81,630
Families		48,359	49,505
Median Age		41.8	42.4
Median Household Income		\$70,982	\$79,136
	Spending Potential Index	Average Amount Spent	Total
Assets			
Value of Checking/Savings/Money Market Accounts & CDs	128	\$5,085.64	\$403,209,926
Value of Checking/Savings/Money Market Accounts & CDs (1 year ago)	130	\$4,700.38	\$372,664,871
Value of Stocks/Bonds/Mutual Funds	136	\$8,420.65	\$667,622,438
Value of Stocks/Bonds/Mutual Funds (1 year ago)	135	\$7,683.10	\$609,147,219
Value of Other Financial Assets	129	\$1,670.45	\$132,439,803
Value of Other Financial Assets (1 year ago)	128	\$1,540.41	\$122,130,177
Value of Retirement Plans	131	\$31,767.84	\$2,518,681,395
Value of Retirement Plans (1 year ago)	130	\$29,570.45	\$2,344,463,274
Surrender Value of Whole Life Policies	124	\$1,865.46	\$147,901,100
Surrender Value of Whole Life Policies (1 year ago)"	124	\$1,510.40	\$119,750,922
Earnings			
Interest/Dividends	133	\$1,441.84	\$114,314,601
Royalty/Estate/Trust Income	134	\$551.25	\$43,705,560
Liabilities			
Original Mortgage Amount (Owned Home)	130	\$14,211.78	\$1,126,766,476
Vehicle Loan Amount (1)	120	\$3,257.93	\$258,301,709
Value of Credit Card Debt	125	\$727.32	\$57,665,222
Value of Credit Card Debt (1 year ago)	125	\$692.11	\$54,873,536
Value Owed on Student Loans	126	\$1,838.54	\$145,767,169
Value Owed on Student Loans (1 year ago)	126	\$1,715.16	\$135,985,136
Value Owed on Non-student Loans	112	\$233.86	\$18,540,965
Value Owed on Non-student Loans (1 year ago)	109	\$172.46	\$13,673,444
Amount Paid: Interest			
Home Mortgage	128	\$4,622.41	\$366,482,841
Lump Sum Home Equity Loan	130	\$69.07	\$5,475,783
New Car/Truck/Van Loan	123	\$155.86	\$12,357,020
Used Car/Truck/Van Loan	119	\$156.21	\$12,384,814
Finance/Late/Interest Charges for Credit Cards	126	\$106.75	\$8,463,574
Finance/Late/Interest Charges for Student Loans	128	\$55.26	\$4,381,196
Finance/Late/Interest Charges for Non-student Loans	122	\$13.95	\$1,106,378
Amount Paid: Principal			
Home Mortgage	127	\$2,456.89	\$194,791,676
Lump Sum Home Equity Loan	128	\$106.72	\$8,461,209
New Car/Truck/Van Loan	124	\$1,198.38	\$95,012,605
Used Car/Truck/Van Loan	119	\$958.56	\$75,998,795
Checking Account and Banking Service Charges	122	\$42.48	\$3,368,037

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