



## Financial Expenditures

Anchorage Plaza- Phase Three  
12910 Factory Ln, Louisville, Kentucky, 40245  
Ring: 1 mile radius

Prepared by Charlotte Hollkamp  
Latitude: 38.28821  
Longitude: -85.51154

Demographic Summary		2017	2022	
Population		3,946	4,124	
Households		1,673	1,740	
Families		1,075	1,109	
Median Age		34.2	34.7	
Median Household Income		\$103,100	\$110,746	
		Spending Potential Index	Average Amount Spent	Total
Assets				
Value of Checking/Savings/Money Market Accounts & CDs	146	\$5,768.94	\$9,651,439	
Value of Checking/Savings/Money Market Accounts & CDs (1 year ago)	146	\$5,308.73	\$8,881,511	
Value of Stocks/Bonds/Mutual Funds	150	\$9,272.40	\$15,512,726	
Value of Stocks/Bonds/Mutual Funds (1 year ago)	146	\$8,293.15	\$13,874,446	
Value of Other Financial Assets	142	\$1,850.85	\$3,096,474	
Value of Other Financial Assets (1 year ago)	142	\$1,705.66	\$2,853,571	
Value of Retirement Plans	149	\$36,242.94	\$60,634,432	
Value of Retirement Plans (1 year ago)	147	\$33,216.70	\$55,571,532	
Surrender Value of Whole Life Policies	130	\$1,956.14	\$3,272,620	
Surrender Value of Whole Life Policies (1 year ago)''	137	\$1,674.90	\$2,802,101	
Earnings				
Interest/Dividends	141	\$1,531.66	\$2,562,469	
Royalty/Estate/Trust Income	165	\$677.54	\$1,133,530	
Liabilities				
Original Mortgage Amount (Owned Home)	198	\$21,718.06	\$36,334,308	
Vehicle Loan Amount (1)	159	\$4,328.04	\$7,240,812	
Value of Credit Card Debt	156	\$908.37	\$1,519,709	
Value of Credit Card Debt (1 year ago)	156	\$867.90	\$1,451,994	
Value Owed on Student Loans	160	\$2,329.45	\$3,897,178	
Value Owed on Student Loans (1 year ago)	162	\$2,196.26	\$3,674,350	
Value Owed on Non-student Loans	134	\$279.44	\$467,503	
Value Owed on Non-student Loans (1 year ago)	128	\$202.45	\$338,704	
Amount Paid: Interest				
Home Mortgage	183	\$6,618.28	\$11,072,388	
Lump Sum Home Equity Loan	150	\$79.69	\$133,325	
New Car/Truck/Van Loan	168	\$213.07	\$356,464	
Used Car/Truck/Van Loan	158	\$207.05	\$346,399	
Finance/Late/Interest Charges for Credit Cards	161	\$136.60	\$228,526	
Finance/Late/Interest Charges for Student Loans	168	\$72.55	\$121,384	
Finance/Late/Interest Charges for Non-student Loans	158	\$18.16	\$30,380	
Amount Paid: Principal				
Home Mortgage	172	\$3,334.20	\$5,578,118	
Lump Sum Home Equity Loan	138	\$115.05	\$192,483	
New Car/Truck/Van Loan	167	\$1,619.17	\$2,708,875	
Used Car/Truck/Van Loan	157	\$1,261.90	\$2,111,158	
Checking Account and Banking Service Charges	148	\$51.85	\$86,742	

**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

Anchorage Plaza- Phase Three  
12910 Factory Ln, Louisville, Kentucky, 40245  
Ring: 3 mile radius

Prepared by Charlotte Hollkamp  
Latitude: 38.28821  
Longitude: -85.51154

Demographic Summary		2017	2022
Population		44,658	46,512
Households		17,016	17,682
Families		12,153	12,573
Median Age		38.9	39.4
Median Household Income		\$84,387	\$91,737
	Spending Potential Index	Average Amount Spent	Total
<b>Assets</b>			
Value of Checking/Savings/Money Market Accounts & CDs	150	\$5,938.87	\$101,055,812
Value of Checking/Savings/Money Market Accounts & CDs (1 year ago)	152	\$5,497.35	\$93,542,913
Value of Stocks/Bonds/Mutual Funds	163	\$10,091.67	\$171,719,937
Value of Stocks/Bonds/Mutual Funds (1 year ago)	161	\$9,137.35	\$155,481,186
Value of Other Financial Assets	148	\$1,920.38	\$32,677,120
Value of Other Financial Assets (1 year ago)	148	\$1,777.42	\$30,244,496
Value of Retirement Plans	159	\$38,641.52	\$657,524,044
Value of Retirement Plans (1 year ago)	157	\$35,709.57	\$607,633,967
Surrender Value of Whole Life Policies	146	\$2,189.50	\$37,256,483
Surrender Value of Whole Life Policies (1 year ago)"	146	\$1,774.79	\$30,199,865
<b>Earnings</b>			
Interest/Dividends	156	\$1,695.62	\$28,852,701
Royalty/Estate/Trust Income	163	\$667.81	\$11,363,533
<b>Liabilities</b>			
Original Mortgage Amount (Owned Home)	174	\$19,081.69	\$324,694,066
Vehicle Loan Amount (1)	143	\$3,897.78	\$66,324,565
Value of Credit Card Debt	148	\$865.24	\$14,722,897
Value of Credit Card Debt (1 year ago)	149	\$829.59	\$14,116,263
Value Owed on Student Loans	135	\$1,964.76	\$33,432,294
Value Owed on Student Loans (1 year ago)	137	\$1,856.88	\$31,596,684
Value Owed on Non-student Loans	124	\$258.78	\$4,403,347
Value Owed on Non-student Loans (1 year ago)	119	\$188.95	\$3,215,202
<b>Amount Paid: Interest</b>			
Home Mortgage	168	\$6,105.63	\$103,893,334
Lump Sum Home Equity Loan	161	\$85.17	\$1,449,176
New Car/Truck/Van Loan	152	\$192.97	\$3,283,587
Used Car/Truck/Van Loan	140	\$183.04	\$3,114,570
Finance/Late/Interest Charges for Credit Cards	150	\$127.51	\$2,169,712
Finance/Late/Interest Charges for Student Loans	148	\$64.01	\$1,089,256
Finance/Late/Interest Charges for Non-student Loans	143	\$16.43	\$279,526
<b>Amount Paid: Principal</b>			
Home Mortgage	165	\$3,192.12	\$54,317,195
Lump Sum Home Equity Loan	155	\$129.06	\$2,196,044
New Car/Truck/Van Loan	154	\$1,491.18	\$25,373,973
Used Car/Truck/Van Loan	140	\$1,123.63	\$19,119,738
Checking Account and Banking Service Charges	134	\$46.76	\$795,671

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(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

Anchorage Plaza- Phase Three  
12910 Factory Ln, Louisville, Kentucky, 40245  
Ring: 5 mile radius

Prepared by Charlotte Hollkamp  
Latitude: 38.28821  
Longitude: -85.51154

Demographic Summary		2017	2022	
Population		117,205	122,602	
Households		46,231	48,242	
Families		31,735	33,006	
Median Age		40.9	41.6	
Median Household Income		\$82,507	\$89,735	
		Spending Potential Index	Average Amount Spent	Total
Assets				
Value of Checking/Savings/Money Market Accounts & CDs		146	\$5,794.76	\$267,897,372
Value of Checking/Savings/Money Market Accounts & CDs (1 year ago)		148	\$5,371.89	\$248,347,881
Value of Stocks/Bonds/Mutual Funds		159	\$9,822.50	\$454,103,785
Value of Stocks/Bonds/Mutual Funds (1 year ago)		157	\$8,930.55	\$412,868,149
Value of Other Financial Assets		144	\$1,874.53	\$86,661,356
Value of Other Financial Assets (1 year ago)		144	\$1,731.60	\$80,053,406
Value of Retirement Plans		154	\$37,500.23	\$1,733,673,192
Value of Retirement Plans (1 year ago)		153	\$34,790.56	\$1,608,402,194
Surrender Value of Whole Life Policies		143	\$2,149.72	\$99,383,786
Surrender Value of Whole Life Policies (1 year ago)''		142	\$1,733.14	\$80,124,802
Earnings				
Interest/Dividends		153	\$1,668.06	\$77,115,926
Royalty/Estate/Trust Income		155	\$636.62	\$29,431,592
Liabilities				
Original Mortgage Amount (Owned Home)		158	\$17,291.61	\$799,408,571
Vehicle Loan Amount (1)		134	\$3,644.65	\$168,495,829
Value of Credit Card Debt		142	\$826.59	\$38,214,185
Value of Credit Card Debt (1 year ago)		142	\$790.82	\$36,560,621
Value Owed on Student Loans		129	\$1,881.65	\$86,990,470
Value Owed on Student Loans (1 year ago)		130	\$1,772.00	\$81,921,348
Value Owed on Non-student Loans		120	\$250.02	\$11,558,648
Value Owed on Non-student Loans (1 year ago)		116	\$183.08	\$8,464,202
Amount Paid: Interest				
Home Mortgage		155	\$5,612.24	\$259,459,665
Lump Sum Home Equity Loan		156	\$82.56	\$3,817,006
New Car/Truck/Van Loan		141	\$179.05	\$8,277,632
Used Car/Truck/Van Loan		131	\$171.45	\$7,926,267
Finance/Late/Interest Charges for Credit Cards		142	\$120.88	\$5,588,397
Finance/Late/Interest Charges for Student Loans		139	\$60.24	\$2,784,896
Finance/Late/Interest Charges for Non-student Loans		135	\$15.48	\$715,444
Amount Paid: Principal				
Home Mortgage		153	\$2,971.55	\$137,377,769
Lump Sum Home Equity Loan		153	\$126.99	\$5,870,781
New Car/Truck/Van Loan		143	\$1,388.36	\$64,185,227
Used Car/Truck/Van Loan		131	\$1,055.17	\$48,781,413
Checking Account and Banking Service Charges		129	\$44.97	\$2,078,891

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