



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		2018	2023
Population		9,603	10,094
Households		3,782	3,969
Families		2,637	2,755
Median Age		43.5	44.6
Median Household Income		\$85,675	\$91,938
		Spending Potential Index	Average Amount
			Total
Assets			
Value of Checking/Savings/Money Market Accounts & CDs	156	\$6,517.56	\$24,649,423
Value of Checking/Savings/Money Market Accounts & CDs (1 year ago)	158	\$5,867.17	\$22,189,653
Value of Stocks/Bonds/Mutual Funds	171	\$8,643.35	\$32,689,135
Value of Stocks/Bonds/Mutual Funds (1 year ago)	171	\$8,080.59	\$30,560,777
Value of Other Financial Assets	161	\$2,278.95	\$8,618,997
Value of Other Financial Assets (1 year ago)	163	\$2,183.59	\$8,258,319
Value of Retirement Plans	166	\$38,501.37	\$145,612,171
Value of Retirement Plans (1 year ago)	166	\$35,723.40	\$135,105,909
Surrender Value of Whole Life Policies	152	\$2,731.08	\$10,328,926
Surrender Value of Whole Life Policies (1 year ago)"	150	\$2,139.93	\$8,093,220
Earnings			
Interest/Dividends	172	\$1,877.78	\$7,101,761
Royalty/Estate/Trust Income	180	\$852.80	\$3,225,300
Liabilities			
Original Mortgage Amount (Owned Home)	158	\$17,264.23	\$65,293,331
Vehicle Loan Amount (1)	132	\$3,704.08	\$14,008,828
Value of Credit Card Debt	147	\$867.06	\$3,279,215
Value of Credit Card Debt (1 year ago)	149	\$821.13	\$3,105,526
Value Owed on Student Loans	129	\$2,007.73	\$7,593,238
Value Owed on Student Loans (1 year ago)	131	\$1,923.06	\$7,273,016
Value Owed on Non-student Loans	131	\$268.72	\$1,016,292
Value Owed on Non-student Loans (1 year ago)	128	\$197.68	\$747,641
Amount Paid: Interest			
Home Mortgage	158	\$5,677.27	\$21,471,432
Lump Sum Home Equity Loan	166	\$72.44	\$273,969
New Car/Truck/Van Loan	141	\$188.75	\$713,863
Used Car/Truck/Van Loan	130	\$172.08	\$650,793
Finance/Late/Interest Charges for Credit Cards	143	\$126.23	\$477,409
Finance/Late/Interest Charges for Student Loans	138	\$66.89	\$252,979
Finance/Late/Interest Charges for Non-student Loans	134	\$16.19	\$61,223
Amount Paid: Principal			
Home Mortgage	159	\$3,035.63	\$11,480,769
Lump Sum Home Equity Loan	167	\$119.20	\$450,811
New Car/Truck/Van Loan	144	\$1,494.81	\$5,653,360
Used Car/Truck/Van Loan	131	\$1,142.34	\$4,320,346
Checking Account and Banking Service Charges	127	\$47.34	\$179,047

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 2018 and 2023; Consumer Spending data are derived from the 2015 and 2016 Consumer Expenditure Surveys, Bureau of Labor Statistics.



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		2018	2023
Population		73,160	75,759
Households		32,204	33,323
Families		18,944	19,480
Median Age		42.9	43.5
Median Household Income		\$72,820	\$81,003
	Spending Potential Index	Average Amount	Total
Assets			
Value of Checking/Savings/Money Market Accounts & CDs	126	\$5,279.47	\$170,019,972
Value of Checking/Savings/Money Market Accounts & CDs (1 year ago)	127	\$4,710.18	\$151,686,569
Value of Stocks/Bonds/Mutual Funds	131	\$6,602.43	\$212,624,710
Value of Stocks/Bonds/Mutual Funds (1 year ago)	131	\$6,176.78	\$198,916,960
Value of Other Financial Assets	132	\$1,863.30	\$60,005,811
Value of Other Financial Assets (1 year ago)	133	\$1,786.46	\$57,531,130
Value of Retirement Plans	127	\$29,414.13	\$947,252,747
Value of Retirement Plans (1 year ago)	127	\$27,312.36	\$879,567,091
Surrender Value of Whole Life Policies	121	\$2,179.08	\$70,175,188
Surrender Value of Whole Life Policies (1 year ago)"	121	\$1,723.33	\$55,498,161
Earnings			
Interest/Dividends	130	\$1,424.87	\$45,886,537
Royalty/Estate/Trust Income	138	\$654.06	\$21,063,240
Liabilities			
Original Mortgage Amount (Owned Home)	122	\$13,255.58	\$426,882,804
Vehicle Loan Amount (1)	115	\$3,215.52	\$103,552,609
Value of Credit Card Debt	122	\$718.76	\$23,146,986
Value of Credit Card Debt (1 year ago)	122	\$672.59	\$21,660,241
Value Owed on Student Loans	127	\$1,975.28	\$63,612,043
Value Owed on Student Loans (1 year ago)	127	\$1,865.66	\$60,081,613
Value Owed on Non-student Loans	119	\$243.64	\$7,846,096
Value Owed on Non-student Loans (1 year ago)	116	\$178.32	\$5,742,760
Amount Paid: Interest			
Home Mortgage	121	\$4,323.14	\$139,222,387
Lump Sum Home Equity Loan	124	\$54.10	\$1,742,124
New Car/Truck/Van Loan	119	\$158.29	\$5,097,658
Used Car/Truck/Van Loan	117	\$154.69	\$4,981,751
Finance/Late/Interest Charges for Credit Cards	122	\$107.67	\$3,467,481
Finance/Late/Interest Charges for Student Loans	126	\$61.28	\$1,973,468
Finance/Late/Interest Charges for Non-student Loans	121	\$14.57	\$469,221
Amount Paid: Principal			
Home Mortgage	120	\$2,296.74	\$73,964,126
Lump Sum Home Equity Loan	125	\$89.36	\$2,877,597
New Car/Truck/Van Loan	119	\$1,235.33	\$39,782,488
Used Car/Truck/Van Loan	117	\$1,021.14	\$32,884,764
Checking Account and Banking Service Charges	120	\$44.51	\$1,433,456

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July 11, 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		2018	2023
Population		188,613	195,754
Households		81,115	84,033
Families		49,394	50,928
Median Age		41.9	42.6
Median Household Income		\$75,828	\$83,533
	Spending Potential Index	Average Amount	Total
Assets			
Value of Checking/Savings/Money Market Accounts & CDs	130	\$5,408.08	\$438,676,243
Value of Checking/Savings/Money Market Accounts & CDs (1 year ago)	130	\$4,830.92	\$391,860,436
Value of Stocks/Bonds/Mutual Funds	135	\$6,788.21	\$550,625,894
Value of Stocks/Bonds/Mutual Funds (1 year ago)	134	\$6,352.96	\$515,320,603
Value of Other Financial Assets	133	\$1,876.40	\$152,204,008
Value of Other Financial Assets (1 year ago)	134	\$1,796.18	\$145,697,120
Value of Retirement Plans	132	\$30,534.19	\$2,476,780,970
Value of Retirement Plans (1 year ago)	132	\$28,329.94	\$2,297,983,372
Surrender Value of Whole Life Policies	125	\$2,255.48	\$182,953,057
Surrender Value of Whole Life Policies (1 year ago)"	125	\$1,783.32	\$144,653,979
Earnings			
Interest/Dividends	134	\$1,461.04	\$118,512,021
Royalty/Estate/Trust Income	141	\$668.21	\$54,202,001
Liabilities			
Original Mortgage Amount (Owned Home)	129	\$14,019.56	\$1,137,196,565
Vehicle Loan Amount (1)	118	\$3,307.53	\$268,290,196
Value of Credit Card Debt	126	\$739.78	\$60,007,230
Value of Credit Card Debt (1 year ago)	126	\$694.14	\$56,305,488
Value Owed on Student Loans	127	\$1,969.49	\$159,755,048
Value Owed on Student Loans (1 year ago)	127	\$1,865.88	\$151,350,645
Value Owed on Non-student Loans	120	\$246.72	\$20,012,975
Value Owed on Non-student Loans (1 year ago)	118	\$180.95	\$14,677,568
Amount Paid: Interest			
Home Mortgage	128	\$4,578.51	\$371,385,724
Lump Sum Home Equity Loan	129	\$56.22	\$4,560,536
New Car/Truck/Van Loan	123	\$164.08	\$13,309,573
Used Car/Truck/Van Loan	119	\$157.93	\$12,810,387
Finance/Late/Interest Charges for Credit Cards	125	\$110.19	\$8,938,345
Finance/Late/Interest Charges for Student Loans	127	\$61.71	\$5,005,219
Finance/Late/Interest Charges for Non-student Loans	124	\$14.95	\$1,212,269
Amount Paid: Principal			
Home Mortgage	127	\$2,425.00	\$196,703,837
Lump Sum Home Equity Loan	130	\$92.84	\$7,530,604
New Car/Truck/Van Loan	123	\$1,283.38	\$104,101,296
Used Car/Truck/Van Loan	119	\$1,043.24	\$84,622,630
Checking Account and Banking Service Charges	120	\$44.59	\$3,616,739

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