



## 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		2018	2023
Population		4,280	4,600
Households		1,858	2,005
Families		1,177	1,256
Median Age		34.3	35.5
Median Household Income		\$100,529	\$105,676
		Spending Potential Index	Average Amount
			Total
<b>Assets</b>			
Value of Checking/Savings/Money Market Accounts & CDs	138	\$5,774.39	\$10,728,816
Value of Checking/Savings/Money Market Accounts & CDs (1 year ago)	137	\$5,083.19	\$9,444,575
Value of Stocks/Bonds/Mutual Funds	137	\$6,918.19	\$12,854,001
Value of Stocks/Bonds/Mutual Funds (1 year ago)	137	\$6,457.90	\$11,998,776
Value of Other Financial Assets	125	\$1,765.06	\$3,279,480
Value of Other Financial Assets (1 year ago)	125	\$1,673.58	\$3,109,517
Value of Retirement Plans	138	\$31,987.86	\$59,433,440
Value of Retirement Plans (1 year ago)	136	\$29,208.40	\$54,269,209
Surrender Value of Whole Life Policies	126	\$2,267.45	\$4,212,915
Surrender Value of Whole Life Policies (1 year ago)"	133	\$1,886.07	\$3,504,317
<b>Earnings</b>			
Interest/Dividends	132	\$1,445.38	\$2,685,508
Royalty/Estate/Trust Income	140	\$662.13	\$1,230,238
<b>Liabilities</b>			
Original Mortgage Amount (Owned Home)	171	\$18,581.13	\$34,523,741
Vehicle Loan Amount (1)	146	\$4,089.05	\$7,597,457
Value of Credit Card Debt	146	\$861.00	\$1,599,747
Value of Credit Card Debt (1 year ago)	147	\$807.57	\$1,500,463
Value Owed on Student Loans	152	\$2,365.12	\$4,394,394
Value Owed on Student Loans (1 year ago)	152	\$2,241.60	\$4,164,898
Value Owed on Non-student Loans	136	\$277.77	\$516,093
Value Owed on Non-student Loans (1 year ago)	130	\$199.70	\$371,048
<b>Amount Paid: Interest</b>			
Home Mortgage	165	\$5,898.57	\$10,959,534
Lump Sum Home Equity Loan	127	\$55.51	\$103,146
New Car/Truck/Van Loan	154	\$205.33	\$381,494
Used Car/Truck/Van Loan	147	\$194.64	\$361,637
Finance/Late/Interest Charges for Credit Cards	145	\$128.19	\$238,171
Finance/Late/Interest Charges for Student Loans	148	\$71.74	\$133,296
Finance/Late/Interest Charges for Non-student Loans	158	\$19.09	\$35,470
<b>Amount Paid: Principal</b>			
Home Mortgage	156	\$2,969.08	\$5,516,549
Lump Sum Home Equity Loan	129	\$92.07	\$171,069
New Car/Truck/Van Loan	153	\$1,588.20	\$2,950,871
Used Car/Truck/Van Loan	146	\$1,275.13	\$2,369,183
Checking Account and Banking Service Charges	137	\$50.75	\$94,299

**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.

July 16, 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		2018	2023
Population		45,553	48,000
Households		17,438	18,416
Families		12,388	13,006
Median Age		38.9	39.7
Median Household Income		\$88,482	\$96,236
	Spending Potential Index	Average Amount	Total
<b>Assets</b>			
Value of Checking/Savings/Money Market Accounts & CDs	148	\$6,175.96	\$107,696,333
Value of Checking/Savings/Money Market Accounts & CDs (1 year ago)	149	\$5,514.92	\$96,169,250
Value of Stocks/Bonds/Mutual Funds	158	\$7,950.23	\$138,636,070
Value of Stocks/Bonds/Mutual Funds (1 year ago)	157	\$7,443.71	\$129,803,442
Value of Other Financial Assets	143	\$2,024.51	\$35,303,343
Value of Other Financial Assets (1 year ago)	144	\$1,927.63	\$33,613,989
Value of Retirement Plans	156	\$35,989.00	\$627,576,235
Value of Retirement Plans (1 year ago)	154	\$33,176.33	\$578,528,819
Surrender Value of Whole Life Policies	145	\$2,618.41	\$45,659,799
Surrender Value of Whole Life Policies (1 year ago)"	146	\$2,078.77	\$36,249,644
<b>Earnings</b>			
Interest/Dividends	156	\$1,705.98	\$29,748,839
Royalty/Estate/Trust Income	161	\$763.17	\$13,308,107
<b>Liabilities</b>			
Original Mortgage Amount (Owned Home)	166	\$18,037.47	\$314,537,487
Vehicle Loan Amount (1)	140	\$3,904.53	\$68,087,251
Value of Credit Card Debt	147	\$864.19	\$15,069,740
Value of Credit Card Debt (1 year ago)	149	\$817.84	\$14,261,491
Value Owed on Student Loans	135	\$2,096.84	\$36,564,623
Value Owed on Student Loans (1 year ago)	136	\$2,002.31	\$34,916,279
Value Owed on Non-student Loans	133	\$271.83	\$4,740,182
Value Owed on Non-student Loans (1 year ago)	129	\$198.97	\$3,469,631
<b>Amount Paid: Interest</b>			
Home Mortgage	164	\$5,883.23	\$102,591,782
Lump Sum Home Equity Loan	151	\$65.92	\$1,149,553
New Car/Truck/Van Loan	149	\$198.47	\$3,460,835
Used Car/Truck/Van Loan	137	\$181.82	\$3,170,620
Finance/Late/Interest Charges for Credit Cards	144	\$127.14	\$2,217,065
Finance/Late/Interest Charges for Student Loans	141	\$68.24	\$1,189,890
Finance/Late/Interest Charges for Non-student Loans	145	\$17.44	\$304,061
<b>Amount Paid: Principal</b>			
Home Mortgage	161	\$3,065.04	\$53,448,237
Lump Sum Home Equity Loan	153	\$109.01	\$1,900,884
New Car/Truck/Van Loan	150	\$1,558.15	\$27,170,965
Used Car/Truck/Van Loan	137	\$1,200.34	\$20,931,562
Checking Account and Banking Service Charges	129	\$47.79	\$833,444

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**Source:** Esri forecasts for 2018 and 2023; Consumer Spending data are derived from the 2015 and 2016 Consumer Expenditure Surveys, Bureau of Labor Statistics.

July 16, 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		2018	2023
Population		121,103	128,090
Households		47,790	50,483
Families		32,727	34,453
Median Age		41.0	41.8
Median Household Income		\$87,476	\$95,495
		Spending Potential Index	Average Amount
			Total
<b>Assets</b>			
Value of Checking/Savings/Money Market Accounts & CDs	146	\$6,092.09	\$291,141,166
Value of Checking/Savings/Money Market Accounts & CDs (1 year ago)	147	\$5,458.53	\$260,863,005
Value of Stocks/Bonds/Mutual Funds	156	\$7,859.39	\$375,600,375
Value of Stocks/Bonds/Mutual Funds (1 year ago)	155	\$7,356.37	\$351,561,062
Value of Other Financial Assets	145	\$2,052.81	\$98,103,908
Value of Other Financial Assets (1 year ago)	146	\$1,959.80	\$93,658,675
Value of Retirement Plans	154	\$35,564.87	\$1,699,644,901
Value of Retirement Plans (1 year ago)	153	\$32,922.18	\$1,573,351,070
Surrender Value of Whole Life Policies	144	\$2,587.20	\$123,642,361
Surrender Value of Whole Life Policies (1 year ago)"	143	\$2,040.48	\$97,514,327
<b>Earnings</b>			
Interest/Dividends	155	\$1,694.32	\$80,971,580
Royalty/Estate/Trust Income	161	\$763.57	\$36,490,978
<b>Liabilities</b>			
Original Mortgage Amount (Owned Home)	154	\$16,804.21	\$803,073,075
Vehicle Loan Amount (1)	132	\$3,693.06	\$176,491,177
Value of Credit Card Debt	142	\$834.09	\$39,861,297
Value of Credit Card Debt (1 year ago)	143	\$788.57	\$37,685,648
Value Owed on Student Loans	130	\$2,018.61	\$96,469,479
Value Owed on Student Loans (1 year ago)	131	\$1,927.79	\$92,129,248
Value Owed on Non-student Loans	129	\$264.44	\$12,637,652
Value Owed on Non-student Loans (1 year ago)	126	\$194.47	\$9,293,505
<b>Amount Paid: Interest</b>			
Home Mortgage	154	\$5,511.17	\$263,378,777
Lump Sum Home Equity Loan	151	\$66.03	\$3,155,507
New Car/Truck/Van Loan	140	\$187.20	\$8,946,118
Used Car/Truck/Van Loan	130	\$172.37	\$8,237,530
Finance/Late/Interest Charges for Credit Cards	139	\$122.66	\$5,862,108
Finance/Late/Interest Charges for Student Loans	136	\$65.83	\$3,146,240
Finance/Late/Interest Charges for Non-student Loans	136	\$16.40	\$783,980
<b>Amount Paid: Principal</b>			
Home Mortgage	152	\$2,907.69	\$138,958,517
Lump Sum Home Equity Loan	153	\$108.96	\$5,207,165
New Car/Truck/Van Loan	142	\$1,473.47	\$70,417,340
Used Car/Truck/Van Loan	131	\$1,140.71	\$54,514,360
Checking Account and Banking Service Charges	125	\$46.52	\$2,223,102

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