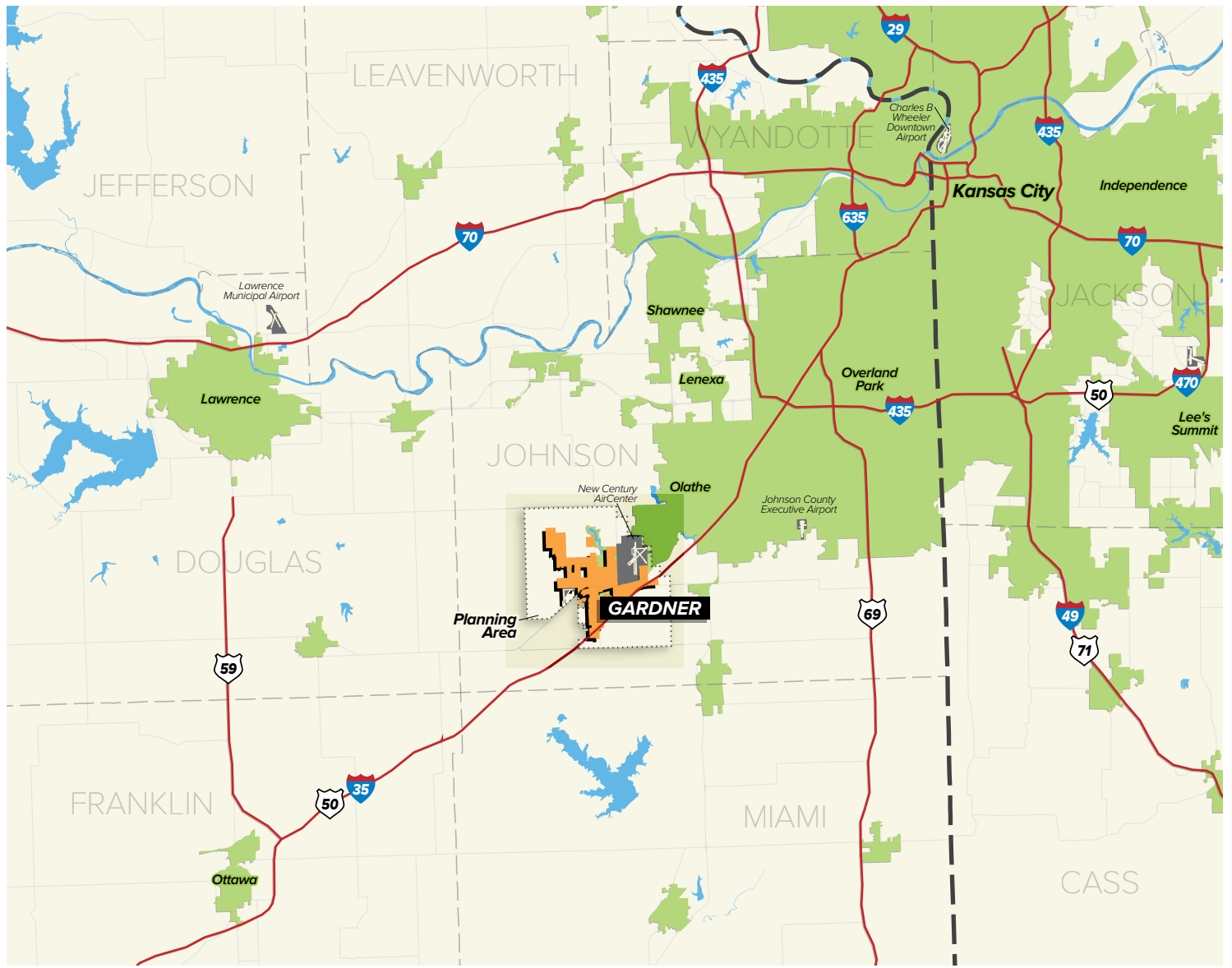




## 2 COMMUNITY PROFILE

In order to define and implement a clear vision, the Gardner community must first understand where it is today. This chapter includes analysis of current conditions in Gardner including a summary of the City's history, past plans and studies, existing land use and development patterns, transportation network, community facilities, and environmental features. It also includes an assessment of demographics and market potential that establish realistic parameters for future land use and development.

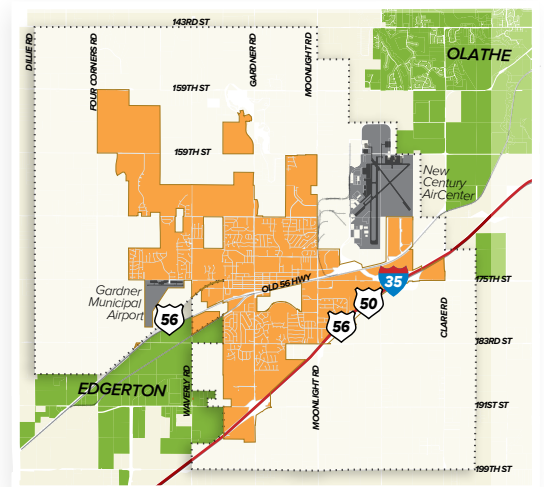


## COMMUNITY SETTING

Gardner's high level of accessibility to the Kansas City Metro Area is one of its primary assets. Lying on the southwestern edge of the Kansas City Metro Area, the City of Gardner offers a great location to residents and businesses alike.

Gardner is located approximately 30 miles southwest of Downtown Kansas City along Interstate 35. Its location at the fringe of development in the region makes it the next frontier for major regional commerce and industry, as well as a community valued for its traditional charm with access to the culture that the Kansas City region has to offer.

Gardner is located in Johnson County, and is bounded to the east by Olathe. To the west, it shares a border with Edgerton, though much of the area between the two communities is currently unincorporated. There are several major elements that will influence Gardner's growth over the next several decades including I-35 interchanges at US-56 and Gardner Road, the New Century AirCenter, Gardner Lake, and Logistics Park Kansas City Intermodal Facility. Set among these features is a traditional downtown on Main Street, centrally located neighborhoods, contemporary subdivisions, and quality amenities for residents, businesses and visitors.





## REGIONAL HISTORY

The City of Gardner has a long, rich history. Founded in 1857 and named after Massachusetts Governor Henry J. Gardner, the City was established by early settlers as a Free State. Gardner was attacked on several occasions over its position as a Free State, which was part of the larger Bleeding Kansas confrontations, serving as one of the precursors to the Civil War.

### “WHERE THE TRAILS DIVIDE”

Gardner is home to the historic location of where the Santa Fe Trail divides, with one fork leading to Oregon and California and the other to New Mexico. During the 19th Century, hundreds of thousands of travelers came through Gardner and chose to either follow the Santa Fe Trail, or head for the west coast on the Oregon and California Trails.

## A REGIONAL DESTINATION

Gardner has evolved from a community along a historic trading trail, to a community that serves as an important center for commerce and culture. The intermodal facility and New Century AirCenter provide the foundation for local, regional, and interstate commerce and distribution, while the Johnson County Fairgrounds host an annual county fair that draws thousands of visitors each year. These assets provide the foundation for employment, commerce, and housing that is transforming the community into an attractive and modern place to invest.

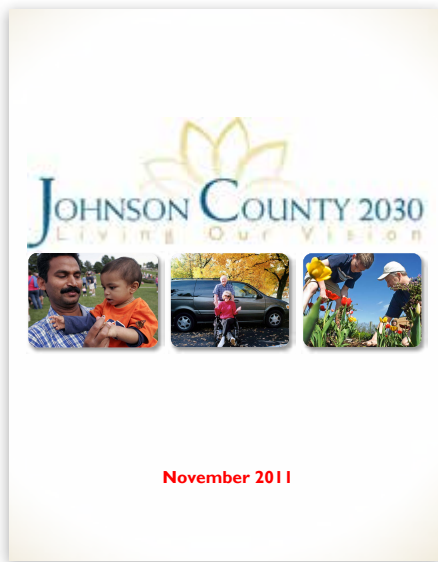
## PLANNING JURISDICTION

The Comprehensive Plan addresses issues within the municipal boundaries of Gardner, as well as unincorporated areas adjacent to the City, which form the planning boundary. Kansas State Statute ch. 12 § 7-47 allows cities to plan for areas within the city as well as unincorporated territory adjacent to existing city limits that “form the total community to which the city is a part.” The map on the previous page illustrates Gardner’s planning boundary.

It should be noted that subsequent maps in this document show a slightly smaller area. This is due to the fact that little or no growth is anticipated in several areas near the edge of the City’s planning boundary. However, as Johnson County or other communities conduct planning in these areas, the City of Gardner should be engaged to assess potential impacts on the community and consider appropriate types of development.

## BOUNDARY AGREEMENTS

Boundary agreements between municipalities set jurisdictional control and annexation powers over adjacent, unincorporated land. These agreements help avoid bidding wars between communities over potential developments and ensure adequate provision of infrastructure and services as development occurs. The City of Gardner has boundary agreements in place with the City of Olathe and City of DeSoto. Established in 1989, the agreement defines Gardner’s northern and eastern growth boundaries.



## PAST PLANS & STUDIES

A thorough review of the City of Gardner’s existing and past plans, studies, and reports was conducted to gain a better understanding of prior initiatives, assessments, and objectives. While some have been implemented throughout the years, others remain as visionary goals for the future, and many have been influential in shaping the City’s policies and built environment today.

### REGIONAL PLANS Southwest Johnson County Area Plan (August 2013)

This plan describes a vision to help manage the interests of the development surrounding the BNSF Kansas City Intermodal Facility (KCIMF) and the Logistics Park Kansas City (LPKC). The plan identifies and evaluates potential development scenarios, and determines the transportation system necessary to support that development.

### Johnson County 2030 – November (2011)

Johnson County 2030 is a visioning plan that seeks to provide guidance for county-wide growth and development over the next 15-20 years.

### KDOT 5-County Regional Transportation Study

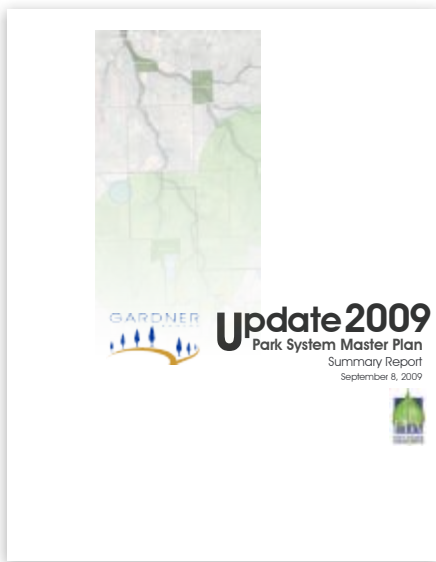
In 2013, the Kansas Department of Transportation released the second part of a two-phase study of the changing transportation needs in Douglas, Johnson, Leavenworth, Miami, and Wyandotte counties. The study provides strategies for future investment that will enhance transportation throughout the 5-county region in a sustainable way.

### US-56 Corridor Management Plan (2010)

The Kansas Department of Transportation (KDOT) and Partners undertook development of the US-56 Corridor Management Plan to improve access management and capacity along the corridor in a way that supports the needs and addresses the concerns of the community. The US-56 Corridor Management Plan was developed in three phases: foundations of fact, forecasting the future, and formulating a fit. In general, the recommendations of this plan indicate a concept of “no new access,” except at public streets.

### Johnson County Comprehensive Arterial Roadway Network Plan (2009)

This plan provides corridor development roadway categories and requirements for County arterial roads. Within Gardner, this includes Center Street from Main Street south, and W. Santa Fe Street/ W. 175th Street from Poplar Drive/US-56 west.



## LOCAL PLANS

### Gardner Municipal Airport Master Plan (2010)

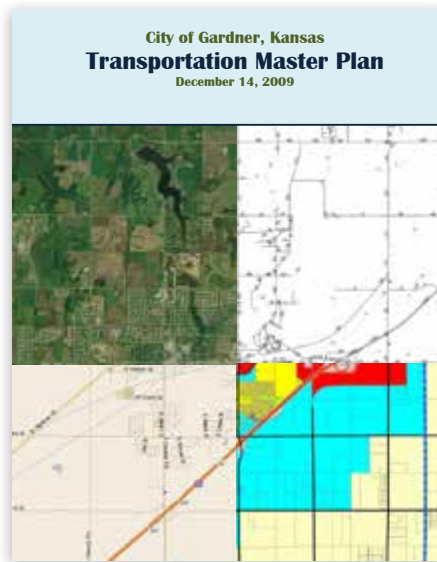
The Gardner Municipal Airport Master Plan is broken into seven chapters: airport inventory, demand forecasts, facility requirements, airport alternatives analysis, environmental review, airport layout plans, and airport capital financing plan. This plan gives two alternatives for new runway development, while favoring alternative B for its unconstrained design concept.

### Gardner Park System Master Plan (2009)

The 2009 update to the Park System Master Plan follows previous plans completed in 2002, 2003, and 2004/05. This plan identifies seven goals that target efforts to maintain the existing system and meet the needs Gardner's growing population. These seven goals recommend the following: conduct a community center feasibility study, expand the greenway and trail system, acquire additional park land, improve and maintain existing facilities, develop new facilities and amenities to meet the needs of a rapidly growing population, adopt and enforce trail system design guidelines, and adopt and enforce landscape guidelines.

### Main Street Corridor Plan (2001)

The Main Street Corridor Plan provides a vision for development and redevelopment of the corridor along Main Street/US-56 from Center Street on the west to I-35 interchange on the east. The plan divides the corridor into four districts with detailed guidelines and recommendations for building architecture, streetscape design, site and landscape improvements, and zoning regulations.



### Transportation Master Plan (2009)

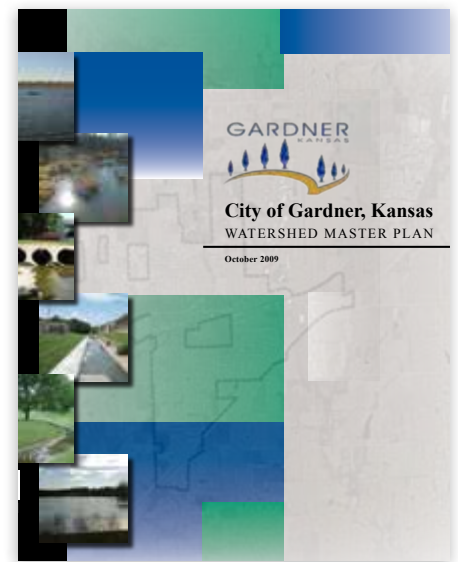
The City of Gardner initiated a Transportation Master Plan to assess the transportation needs within the community and recommend potential short-term and long-term improvements to address those needs. The focus of the plan is the roadway network, however, other transportation modes are also addressed in a general manner.

### Wastewater Master Plan (2009)

The purpose of the Wastewater Master Plan is to provide the City with a comprehensive plan for the development of its wastewater infrastructure to meet anticipated short-term and long-term growth of the City. It also establishes a plan for the conveyance and treatment of all wastewater that will be generated within the City. This plan provides the City of Gardner with a schedule indicating the recommended capital improvements over the next 20 years.

### Water Supply & Treatment Plant Study (2008)

This study was conducted in anticipation of continued substantial growth over the next 25 years. This project recommends a water supply and treatment plan and implementation through the next 25 years by assessing current water source location, available quantity, and associated treatment capacity data. The recommended improvements and the implementation schedule of this plan are used to develop the Capital Improvement Plan (CIP).



### Watershed Master Plan (2009)

The Watershed Master Plan provides the City of Gardner with a unique combination of comprehensive technical data, guiding principles, and tools that are readily available to City staff. This project was broken into 2 phases; first to establish the stream network, followed by a modeling system to estimate stormwater runoff flow rates from each subarea, and to route flows downstream and develop floodplain maps, conceptual stormwater improvement project solutions, and stream buffer limits.

### Access Management Code (2012)

The Access Management Code applies to all roadway rights-of-way (public and private) within the City of Gardner, as well as to all properties that abut these roadways. Its intention is to provide for and manage access to land development, while preserving the traffic flow and balancing reasonable access to private property and the right of citizens to safe and efficient travel. This code draws on existing and regional and national access management guidelines to set policies and standards for the City of Gardner.

# COMMUNITY CHARACTERISTICS

This section includes information about various functional aspects of the Gardner community including:

- Land Use and Development;
- Transportation and Mobility;
- Environmental Features and Open Space; and
- Community Facilities and Infrastructure.

## LAND USE & DEVELOPMENT

Gardner’s current land use pattern is partially built out with a majority of its land use consisting of Agriculture (32.8%), Residential (21.2), and Utility, Infrastructure, and Vacancy (21.9%). The majority of the residential neighborhoods are predominantly single family homes. These neighborhoods surround local schools and community facilities. The community’s denser housing is scattered throughout the City near a variety of amenities such as commercial nodes and public/semi-public uses.

Gardner’s commercial areas cover 5.6% of the community, and are concentrated along key corridors including US-56, Santa Fe Street, and the Downtown along Main Street. Scattered among those commercial corridors and among residential neighborhoods are a variety of public/semi-public uses including schools, government buildings, and religious institutions.

## Land Use & Development Characteristics

### Land Use &

### Development Potential

- Impact of Intermodal Facility and Airport
- Johnson County Fair Grounds are under-utilized
- Lack of retail shopping and entertainment opportunities

### Neighborhoods & Housing

- Manufacturing uses impacting commercial and residential areas
- Housing is considered very affordable

### Zoning

- 21 zoning districts plus Planned Districts
- Multiple Planned Districts create confusion and unpredictability
- Excessively high parking requirements (up to 4/unit in R-1, 4/1,000 s.f. in CO-A)
- Areas of intensive zoning (M-2) adjacent to primary corridors or residential areas (C-2, R-1)

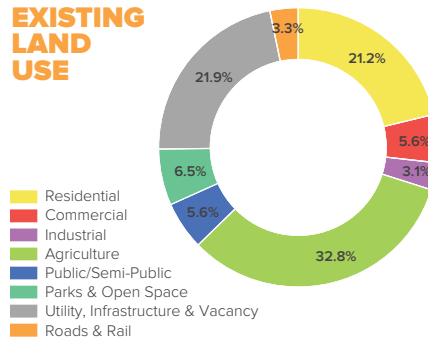
### Vacancies

- Incomplete subdivisions
- Make up 20.5% of land use
- Includes large areas planned for commercial or industrial development

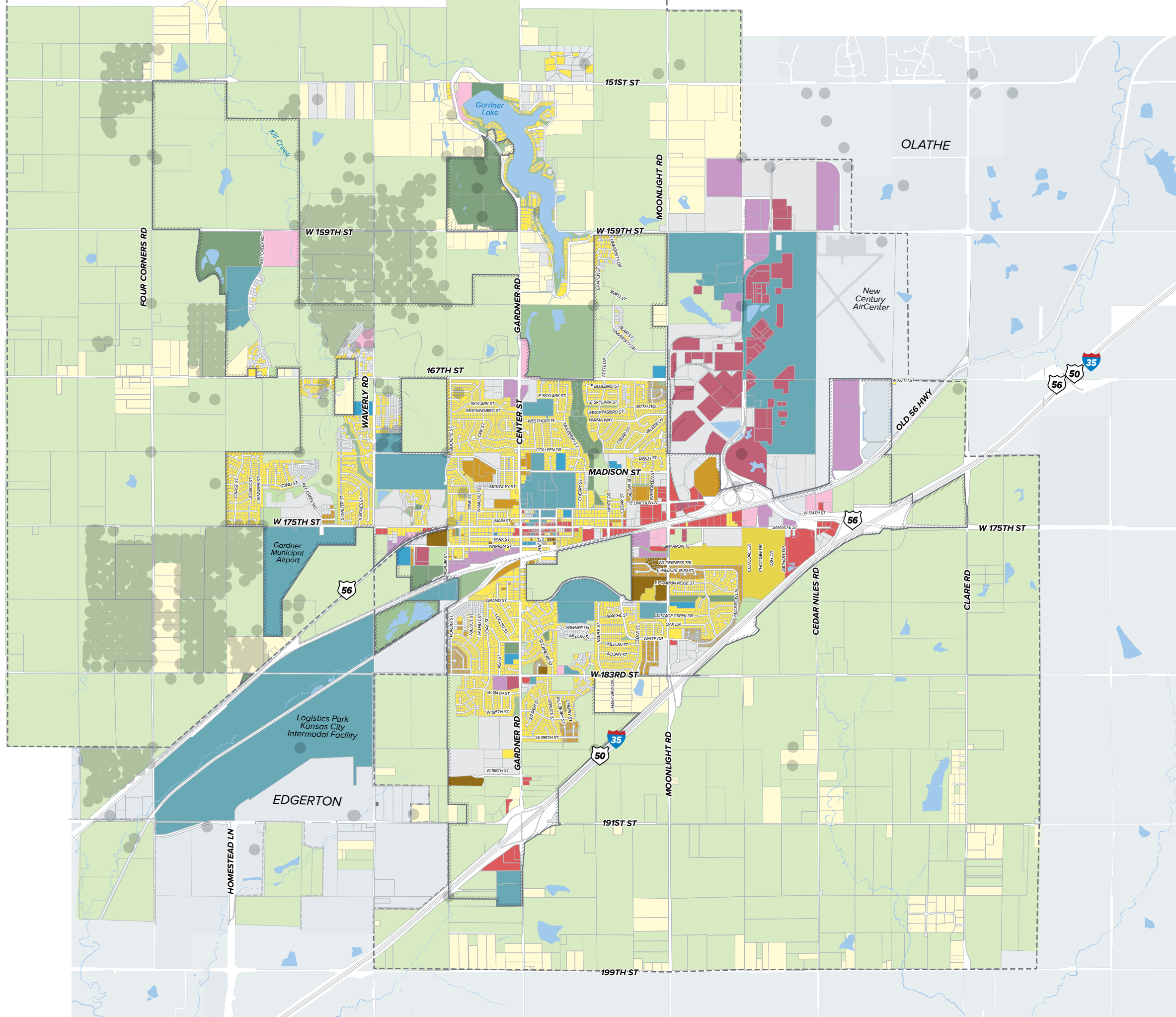
### Annexation & Growth Areas

- No boundary agreement with Edgerton
- Unincorporated islands within City boundaries
- Opportunities for growth within existing urbanized area
- Gardner’s growth area is impacted by Olathe and Edgerton
- Many potential growth areas host oil drilling operations that may have long-term land use impacts
- There are opportunities for infill development

## EXISTING LAND USE



Land Use	Acres	%
Residential	1,464	21.2
Commercial	385	5.6
Industrial	217	3.1
Agriculture	2,265	32.8
Public/Semi-Public	386	5.6
Parks & Open Space	451	6.5
Utility, Infrastructure, Vacancy	1,514	21.9
Roads & Rail	226	3.3
<b>Total</b>	<b>6,908</b>	<b>100</b>



## CITY OF GARDNER EXISTING LAND USE

- Agriculture
- Rural Residential
- Mobile Home Park
- Single Family Detached
- Single Family Attached
- Multi-Family
- Commercial
- Office
- Industrial
- Open Space
- Parks & Recreation
- Public/Semi-Public
- Religious
- Vacant
- Utility
- Oil Well
- Municipal Boundary
- Planning Area





## ENVIRONMENTAL FEATURES & OPEN SPACE

The Parks and Recreation Department is responsible for the operation and maintenance of 22 facilities, including community parks, neighborhood parks, bike/ped paths, and greenways. In its 2009 Park System Master Plan update, the Department recommended a park acreage level of service (LOS) of 12 acres per 1000 residents. This would require approximately 240 acres of parkland, according to 2013 population estimates (20,008). With 195 acres of park space, which includes greenways, parks, and trails, the City falls short of its projected LOS.\*

\*LOS calculation does not include the Gardner Golf Course.

### Parks & Recreation Characteristics

#### 2009 Park System Master Plan

- The Parks and Recreation Department added 3 new bike/ped side paths since the plan. The plan set a goal of acquiring 20.5 acres of parkland/year in order to meet the Plan's 2040 population projections.

#### Facilities

- 4 Community Parks
- 6 Neighborhood Parks
- Gardner Golf Course
- Gardner Aquatic Center
- Gardner Senior Citizens Building
- Trails and Greenways

#### Park Level of Service

- City is 45 acres short of meeting LOS goal (12 acres/1,000 residents)

### Open Space & Environment Characteristics

#### Gardner Lake

- 125 acres
- The City of Gardner owns the lake and limited lakefront property but not the surrounding residential properties

#### KCPL Prairie Wetland

- 55 acre wetland
- Trails, shelters, and picnic areas
- Ecological and educational resource

#### Tree Cover

- Includes tree-lined neighborhoods and natural areas
- May impact development patterns in new growth areas

#### Ground Oil

- Harvested by oil drilled on the western edge of the community
- Impacts potential viability of residential growth

## COMMUNITY FACILITIES & INFRASTRUCTURE

Gardner citizens are served by a variety of community facility providers. City government includes administrative services, public works, and police services while the County provides the Johnson County Fire Protection District and the Johnson County Library (Gardner Branch). Additionally, Gardner has a historical society and museum which hosts a variety of community exhibits and events throughout the year.

### Local Government Characteristics

#### City Hall

- Newer building that houses City Administration and the Finance, Community Development, Parks and Recreation, and Public Works Departments

#### Senior Citizen Building

- Community center building that hosts a variety of events

### Public Works Characteristics

#### Street construction, maintenance, & site-specific projects

- Heavier on maintenance operations
- Completes 2-3 site-specific projects per year

#### Water treatment and distribution

- Water is pumped from a treatment plant located at Hillsdale Lake at a maximum rate of 4.0 MGD

#### Wastewater collection & treatment

- Wastewater is treated at the Kill Creek Wastewater Treatment Plant (KCWWTP)
- KCWWTP has the capacity to treat 2.5 MGD, but can be expanded to 7.5 MGD as demand increases

#### Stormwater & Wastewater

##### Management

- Guided by the Wastewater Master Plan (2009) and Watershed Master Plan (2009)

### Johnson County Fire Protection District Characteristics

- Fire protection and emergency services for Gardner and Edgerton
- Four stations: 2 in Gardner, 1 in New Century, 1 in Edgerton
- Coverage area includes 100 square miles and 13 miles of I-35
- Responded to 2,100 calls in 2012

### Gardner Police Department Characteristics

- Patrol operations, investigative services, and animal control
- Police facility is inadequate for current and future needs

### Gardner-Edgerton Unified School District Characteristics

- 6 elementary schools
- 2 middle schools with an additional to open in the Fall of 2014
- 1 high school
- 5,500 enrollment

### Johnson County Library – Gardner Branch Characteristics

- Current facility opened in 2001
- 166,000 visitors in 2010
- Plans for new carpeting and lighting
- Receives a great deal of youth traffic due to proximity to schools

### Gardner Historical Museum & Historical Society Characteristics

- Historical Museum on National Register of Historic Places
- Bray House used for administration, archives, and research
- Rotating exhibits
- Free admission

## TRANSPORTATION & MOBILITY

The existing transportation and mobility network within Gardner presents a number of issues and opportunities for the community. Although the City of Gardner has a fragmented trail network and a large amount of truck traffic generated by the intermodal facility, Gardner also has great potential for street and trail “infill” through new development, and the airports and intermodal facility present opportunities to spur economic development in these areas.

### Street & Highway Characteristics

#### Classification

- Interstate (I-35)
- Principal Arterial (US-56)
- Minor Arterials
  - Gardner Rd./Center St.;
  - W. 175th St. within city limits;
  - W. 183rd St. between Poplar St. and Moonlight Rd.;
  - Moonlight Rd. between 159th St. and W. 183rd St.;
  - 167th St. between Ingalls St. and Magnolia Rd.;
  - 159th St. between Four Corners Rd. and Gardner Rd.; and
  - Waverly Rd. between Agnes St. and 175th St.
- Major Collectors
  - Four Corners Rd.;
  - Old 56 Hwy.;
  - 164th St.;
  - Grand St.;
  - Wildcat Run/Woodson Ln.;
  - Madison Rd. between Waverly Rd. and Moonlight Rd.; and
  - New Century Pkwy.
- Local Roads (All others)

#### Jurisdiction

- US-56 and I-35 under KDOT
- All others are under the City of Gardner

### Public Transportation Characteristics

#### Public Bus (1 Route)

- Johnson County Transit
- Runs Route 670: Gardner- Overland Xpress,
- Makes limited stops from Edgerton to Kansas City

#### Park & Ride

- Tradenet: Santa Fe & Energy Center Dr. west of Wal-Mart

#### Trail Characteristics

- Gardner Greenway
- Grand Street Pathway
- Madison Street Bike/Ped Path
- Moonlight Road Bike/Ped Path
- North Center Bike/Ped Path
- South Center Bike/Ped Path
- 183rd Street Bike/Ped Path

### Airport Characteristics

#### Gardner Municipal Airport

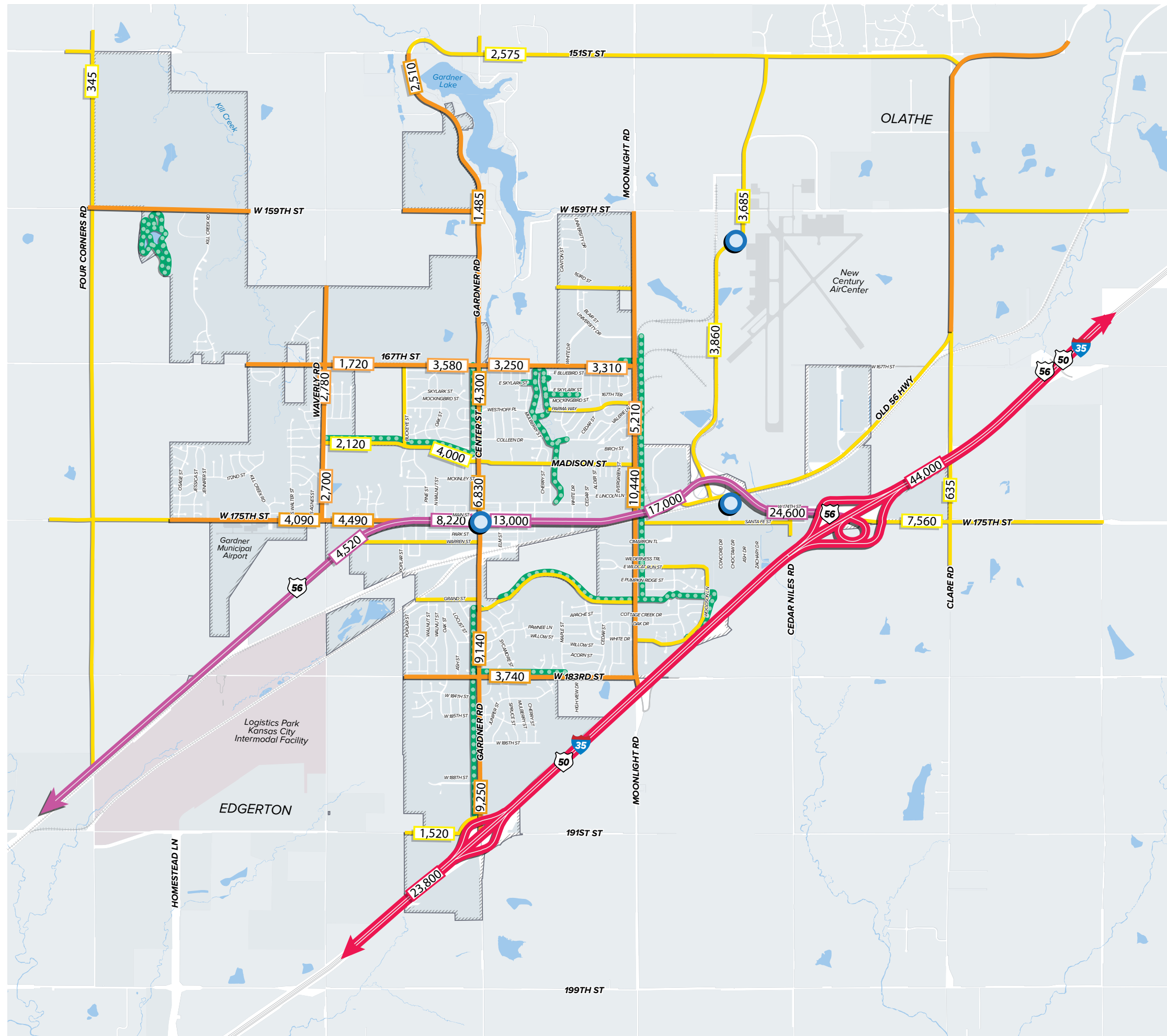
- Owned by the City of Gardner
- Includes more than 100 registered aircraft

#### New Century AirCenter

- Operated by the Johnson County Airport Commission, which reviews zoning and development proposals within 1 mile of airport boundaries

# CITY OF GARDNER EXISTING TRANSPORTATION

- Bus Transit Stops - Route 670
- Existing Multi-Use Trails
- Interstate
- Principal Arterial
- Minor Arterial
- Major Collector
- Average Daily Traffic (2014)
- Kansas Department of Transportation Jurisdiction



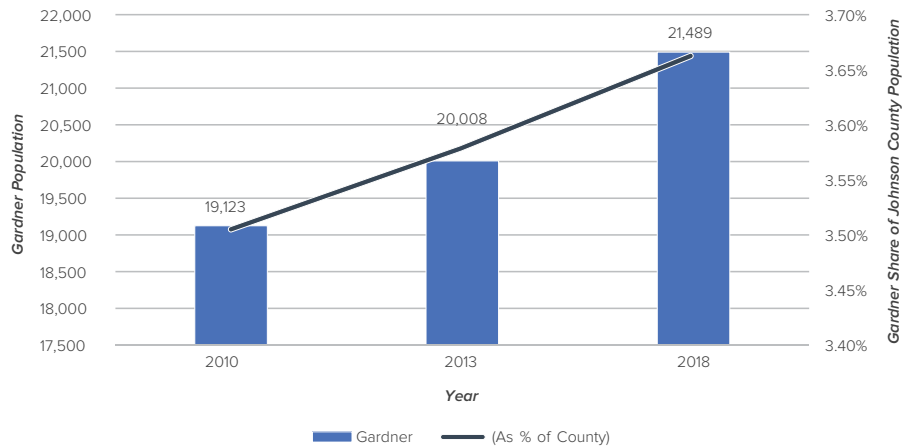


# MARKET & DEMOGRAPHICS

A market and demographic overview was conducted to establish a firm understanding of Gardner’s existing demographic and economic profile as well as current market forces. The overview includes an analysis of recent trends in population, income, and age as well as housing and commercial trends. This overview was an important component in the foundation for land use and development recommendations.

Data for this study were acquired from a variety of sources, including the 2010 U.S. Census, the 2008-2012 American Community Survey (ACS), the U.S. Census “On the Map” Application, the State of Kansas Department of Labor, the Kansas City Area Development Council, the Mid-America Regional Council, and ESRI Business Analyst, a nationally recognized provider of business and market data.

## POPULATION (2010, 2013, 2018) Gardner



## DEMOGRAPHICS

At the time of this analysis, data from the 2013 ESRI Business Analyst software represents the most accurate snapshot of Gardner’s current demographics. 2013 data has been contrasted with 2010 Census and 2018 ESRI estimates to document expected demographic shifts over time. In cases where 2010 Census data was unavailable, data from the 2008-2012 American Community Survey was used.

### Gardner’s population is growing at a faster rate than Johnson County.

- Between 2010 and 2018, the population is projected to increase by 2,366 residents from 19,123 to 21,489
- This 12.4% increase is larger than Johnson County’s increase of 7.9%

### By 2040, Gardner’s population will increase by half.

- Between 2010 and 2040, Gardner is projected to grow by 9,128 residents
- Gardner will grow at an average yearly rate of 1.3% between 2010 and 2040
- Gardner is projected to capture 3.4% of the total population growth in Johnson County between 2010-2040, which is slightly lower than the 2010 population share of 3.5%

## ESTIMATED POPULATION PROJECTIONS

		Year			
		2010	2020	2030	2040
Population	City of Gardner	19,195	22,674	25,341	28,323
	Johnson County	544,179	638,498	727,083	810,939

Source: Mid-America Regional Council

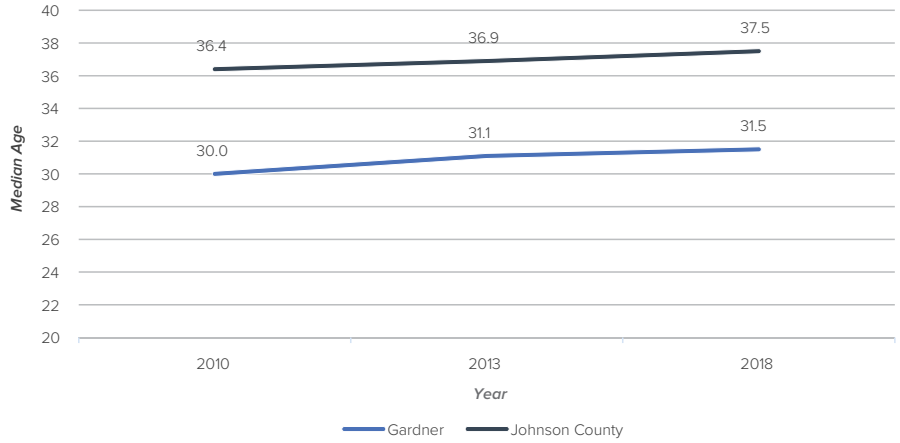
**Gardner’s population is aging at a faster rate than the County, however, the City remains younger than the County.**

- Between 2010 and 2018, the median age in Gardner is projected to increase from 30 to 31.5, an increase of 5.0%
- Between 2010 and 2018, the median age in Johnson County is projected to increase from 36.4 to 37.5, an increase of 3.0%

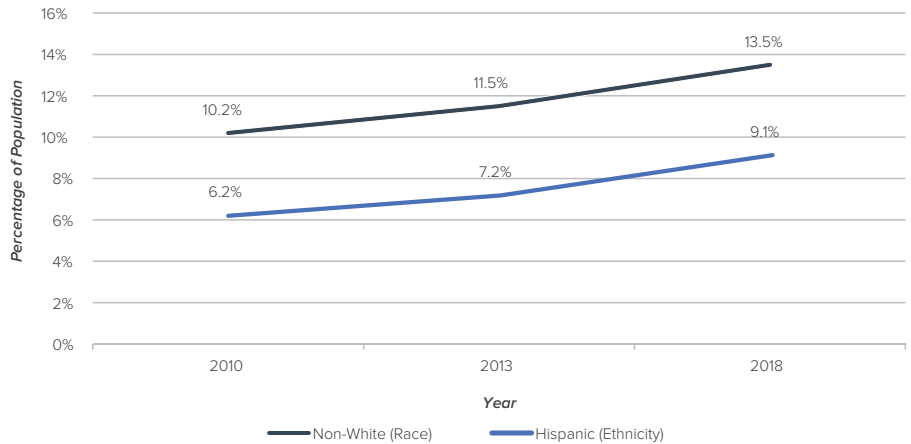
**Both Gardner and Johnson County are becoming more diverse.**

- Between 2010 and 2018, the “non-white” share of the population, by race, is projected to rise from 10.2% to 13.5%
- By 2018, nearly 1 in 10 residents (9.1%) will identify as being of Hispanic origin
- The County is experiencing similar trends

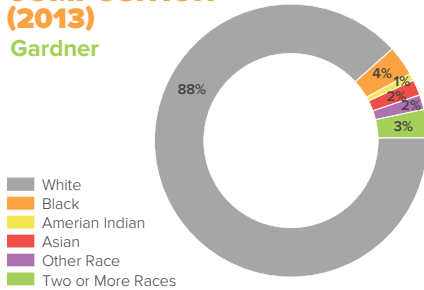
**MEDIAN AGE (2010, 2013, 2018)**  
Gardner & Johnson County



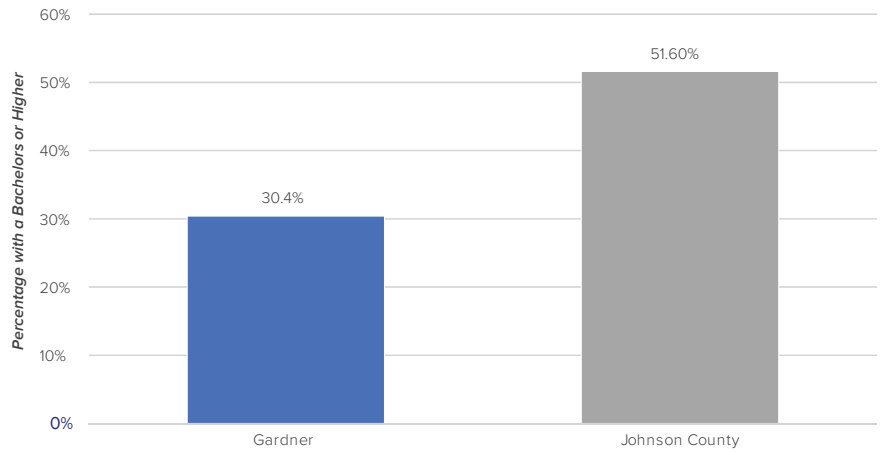
**RACE & ETHNICITY (2010, 2013, 2018)**  
Gardner



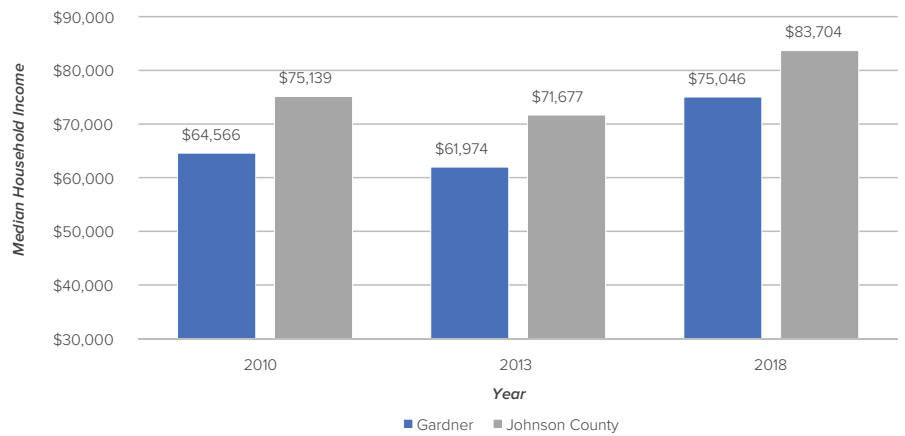
**RACIAL COMPOSITION (2013)**  
Gardner



**COLLEGE ATTAINMENT - 25+ YEARS OLD (2008-2012 AVG.)**  
 Gardner & Johnson County



**MEDIAN HOUSEHOLD INCOME (2010, 2013, 2018)**  
 Gardner & Johnson County



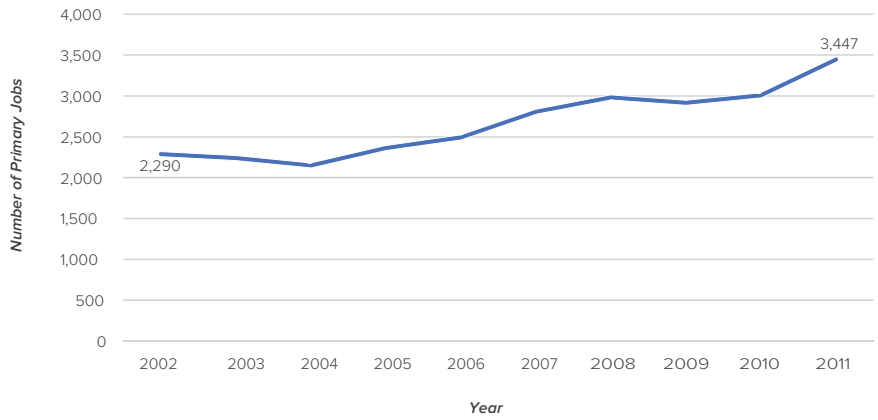
**Gardner’s median household income is increasing at a faster rate than the County, however, the County is projected to stay wealthier.**

- Between 2010 and 2018, the City’s median household income is projected to grow from \$64,566 to \$75,046 (+16.2%)
- In 2013, the median County worker earned roughly \$9,700 more than the median Gardner worker; by 2018, that gap will decline to about \$8,600

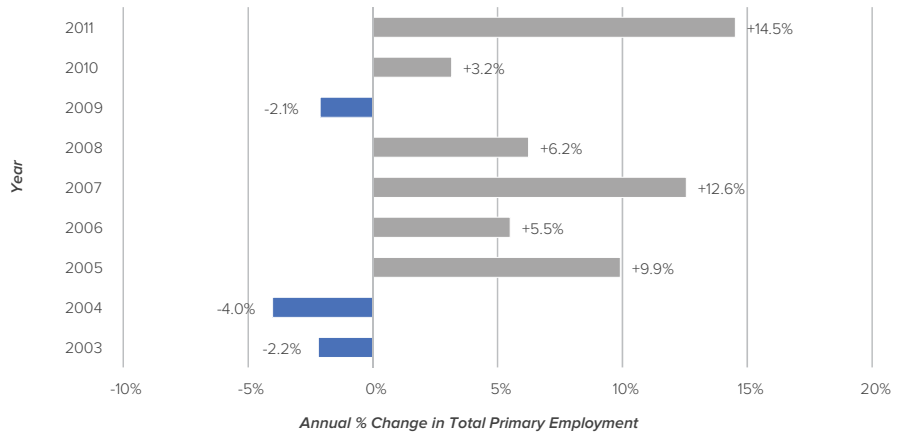
**Roughly 1 in 3 (30.4%) of Gardner residents over the age of 25 have a bachelor’s degree or higher.**

- This is lower than Johnson County’s rate of about 1 in 2 (51.6%)

**TOTAL PRIMARY EMPLOYMENT LEVELS (2002-2011)**  
Gardner



**ANNUAL PRIMARY EMPLOYMENT CHANGE (2002-2011)**  
Gardner





## EMPLOYMENT

Gardner experienced job growth in 6 of the 9 years between 2002 and 2011.

2013 estimates suggest that Gardner is home to 3,324 jobs in a multitude of diverse industries.

Top local industries include:

- Retail Trade (20.2%)
- Educational Services (16.9%)
- Admin & Support & Waste Mgmt. & Remediation (9.3%)
- Manufacturing (8.8%)
- Other Services (8.3%)

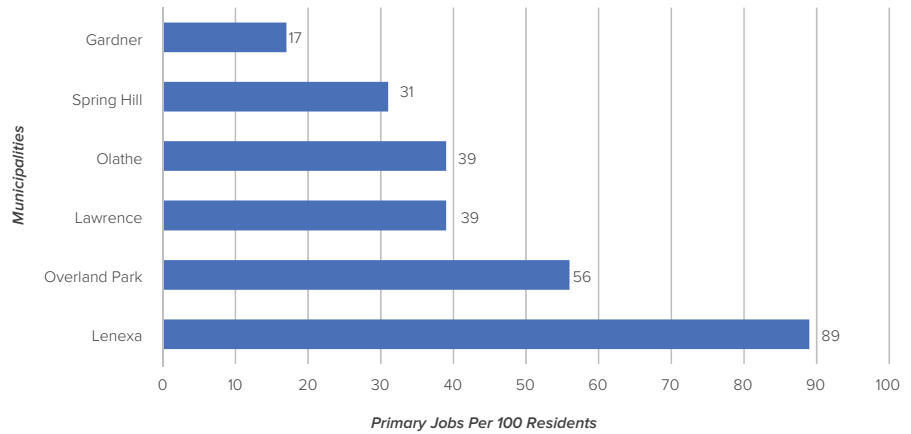
Top County employers include:

- Sprint (7,500 jobs)
- AT&T (3,822 jobs)
- Ford Motor Company (3,800 jobs)
- Olathe School District (3,713 jobs)
- Johnson County Government (3,531 jobs)

### Most Gardner residents work outside of the City.

The Inflow/Outflow Jobs Count paints a picture of commuting patterns and workforce mobility on a daily basis. In 2011, most of Gardner's primary jobs were filled by non-residents commuting into the City, an "inflow" of 3,040 workers. At the same time, most of Gardner's employed residents left the City to work elsewhere, an "outflow" of 7,277. Only 977 workers both live and are employed in Gardner. This influx of workers into Gardner shows that the City's daytime population is larger than its reported population.

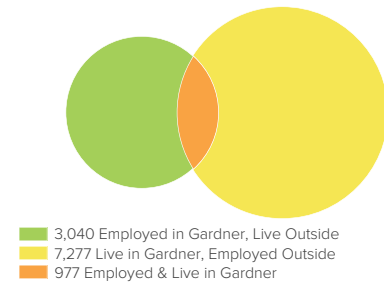
## EMPLOYMENT RATIO (2013) Gardner & Nearby Municipalities



### Gardner is primarily a community of commuters, but has the potential to grow new industries.

- Only 32% of local jobs are filled by residents
- Roughly 7,000 residents commute to jobs outside the City
- Only 17 jobs per 100 residents, one of the lowest ratios in the County
- However, between 2010 and 2020, Gardner may gain 620 jobs based on State employment projections
- Key growth industries include educational services, healthcare and social assistance, and professional, scientific, and tech services

## INFLOW/OUTFLOW JOBS COUNT 2011



## HOUSING

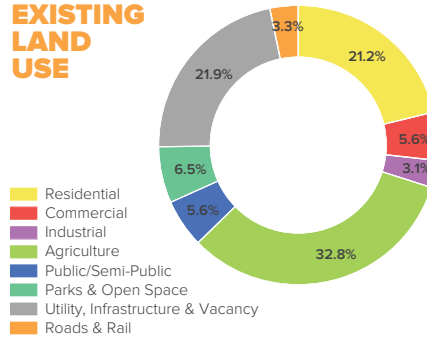
The typical Gardner housing unit is an owner-occupied, single family detached home with 3 bedrooms or less.

- 69.9% of all units are owner occupied
- 66.6% of all units are single family detached
- 74.3% of all units have 3 bedrooms or less

**1 in 4 Gardner residents live in a rental property, however, multi-family units compose only 11.1% of the total housing stock.**

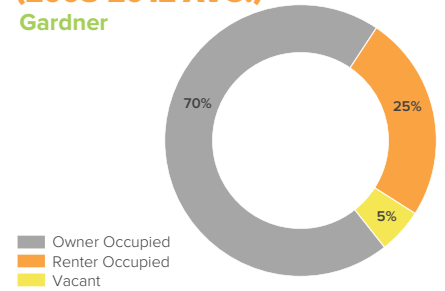
- This suggests that rental properties have larger households and/or many rental properties are not multi-family units (i.e. single family, mobile)

## EXISTING LAND USE



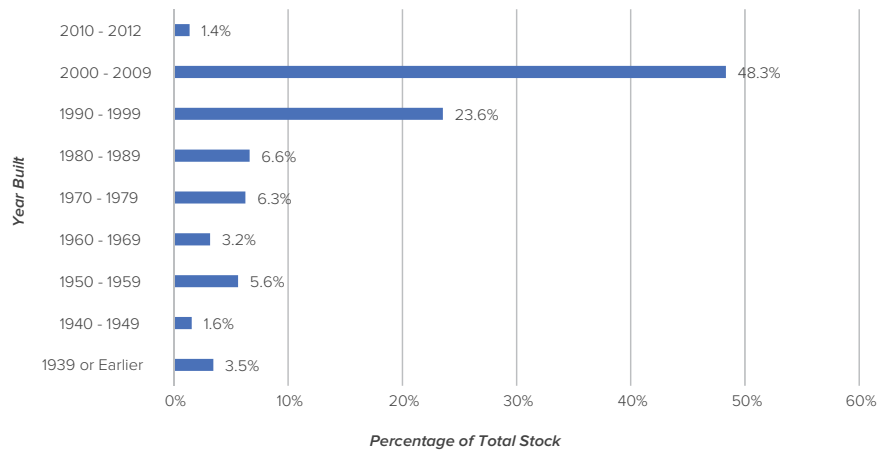
## HOUSING TENURE BY TYPE (2008-2012 AVG.)

Gardner



## HOUSING AGE (2008-2012 AVG.)

Gardner



**Gardner's housing stock is fairly new.**

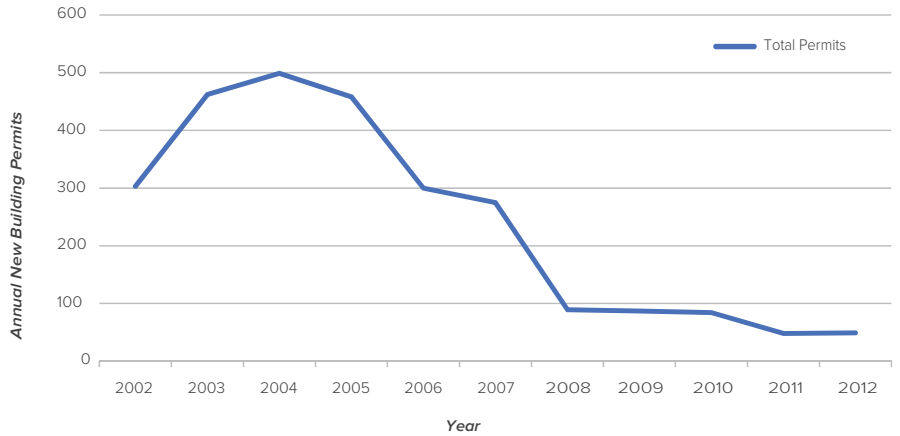
- 73.3% of all units were built between 1990-2012
- Only 5.1% were built prior to 1950

**Both the number of new construction permits and the median home listing price have stayed relatively stable since 2008.**

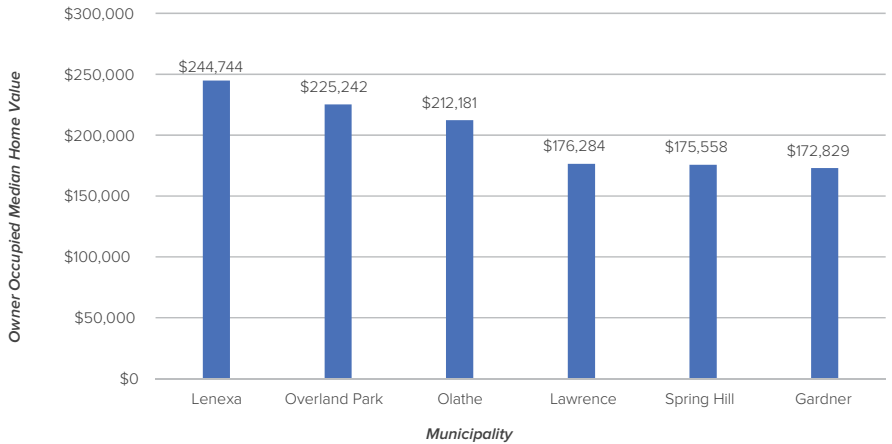
**In 2013, the median home value was \$172,829.**

- This is roughly on par with Spring Hill and Lawrence, but less than Olathe, Overland Park, and Lenexa

**NEW RESIDENTIAL BUILDING PERMITS (2002-2013)**  
Gardner



**MEDIAN HOME VALUE (2013)**  
Gardner & Nearby Municipalities



**DECEMBER MEDIAN HOME LISTING PRICE (2008-2013)**  
Gardner





## RETAIL/COMMERCIAL

**158,711 people live within a 15-minute drive of the intersection of Main Street and Moonlight Road.**

- The median disposable income per household in this drive time is roughly \$54,000

**The retail market is relatively saturated, with a surplus of \$286.8M in total retail spending.**

However, key growth opportunities could include:

- Grocery stores – undersupplied by \$49.3M or 123,370 square feet
- Gasoline stations – undersupplied by \$35.2M or 87,877 square feet
- Bars – undersupplied by \$10.7M or 26,645 square feet
- Furniture stores – undersupplied by \$10.4M or 25,919 square feet

**Other opportunities may exist to capture a proportionate share of the market.**

## Retail Gap Analysis

Gardner's retail market potential has been assessed through a comparison of supply and demand within a 10, 15, and 20-minute drive time from the center of the City. An overview of these findings is provided in the accompanying chart.

A "gap analysis" compares aggregate consumer spending (demand) to aggregate retail sales (supply) within a given retail category and drive time. When demand is greater than supply, "leakage" exists, suggesting that residents are spending dollars outside of the measured area. Accordingly, retail categories with leakage are potential opportunities for growth, as local demand for these goods and services already exists but is unmet by existing supply. Leakage is noted on the accompanying charts as a positive number.

Conversely, when supply outweighs demand, a "surplus" exists. This means that retail sales are greater than consumer spending, and that the market is saturated with customers from both within and outside the drive time window. Surplus is depicted on the accompanying charts as a negative number indicated by parentheses.

It is important to note, however, the difference between market potential ("leakage") and the tangible development of a particular site or location. While leakage may exist, the success of recapturing that lost revenue depends on a variety of factors beyond spending habits, including the availability of developable land, construction costs, rents, road conditions, competition from nearby municipalities, and/or the business climate.

## RETAIL GAP ANALYSIS SUMMARY

### East Main Street & North Moonlight Road, Gardner (2013)

Summary Demographics	10-Minute Drive Time	15-Minute Drive Time	20-Minute Drive Time
2013 Population	32,459	158,711	347,034
2013 Households	11,124	57,156	132,882
2013 Median Disposable Income	\$51,378	\$54,322	\$55,563
2013 Per Capita Income	\$26,227	\$29,893	\$35,219

#### Retail Gap by Market Area (\$M)

Summary	10 Minute Drive Time	15 Minute Drive Time	20 Minute Drive Time
Total Retail Trade and Food & Drink	(\$126.5)	(\$286.8)	(\$759.05)
Total Retail Trade	(\$113.7)	(\$210.1)	(\$725.29)
Total Food & Drink	(\$12.9)	(\$76.8)	(\$33.76)

Industry Group	10-Minute Drive Time		15-Minute Drive Time		20-Minute Drive Time	
	Retail Gap (\$M)	Potential <sup>1</sup> (S.F.)	Retail Gap (\$M)	Potential <sup>1</sup> (S.F.)	Retail Gap (\$M)	Potential <sup>1</sup> (S.F.)
<b>Motor Vehicle &amp; Parts Dealers</b>	<b>(\$34.45)</b>	<b>(86,135)</b>	<b>\$10.2</b>	<b>25,467</b>	<b>\$362.8</b>	<b>907,071</b>
<b>Furniture &amp; Home Furnishings Stores</b>	<b>(\$0.97)</b>	<b>(2,426)</b>	<b>\$0.9</b>	<b>2,348</b>	<b>(\$39.7)</b>	<b>(99,131)</b>
Furniture Stores	(\$0.12)	(305)	\$10.4	25,919	(\$18.2)	(45,526)
Home Furnishings Stores	(\$0.85)	(2,121)	(\$9.4)	(23,571)	(\$21.4)	(53,605)
<b>Electronics &amp; Appliance Stores</b>	<b>\$3.55</b>	<b>8,876</b>	<b>(\$11.7)</b>	<b>(29,370)</b>	<b>(\$56.6)</b>	<b>(141,397)</b>
<b>Bldg Materials, Garden Equip. &amp; Supply Stores</b>	<b>(\$29.33)</b>	<b>(73,319)</b>	<b>(\$41.0)</b>	<b>(102,540)</b>	<b>(\$42.4)</b>	<b>(106,051)</b>
Building Material & Supplies Dealers	(\$28.77)	(71,920)	(\$41.3)	(103,269)	(\$38.5)	(96,255)
Lawn and Garden Equipment & Supplies Stores	(\$0.56)	(1,399)	\$0.3	729	(\$3.9)	(9,796)
<b>Food &amp; Beverage Stores</b>	<b>\$8.74</b>	<b>21,841</b>	<b>\$54.8</b>	<b>137,046</b>	<b>\$10.0</b>	<b>24,879</b>
Grocery Stores	\$8.79	21,979	\$49.3	123,370	(\$8.7)	(21,630)
Specialty Food Stores	(\$0.42)	(1,038)	\$0.2	487	(\$9.7)	(24,141)
Beer, Wine, & Liquor Stores	\$0.36	900	\$5.3	13,189	\$28.3	70,651
<b>Health &amp; Personal Care Stores</b>	<b>(\$5.46)</b>	<b>(13,660)</b>	<b>(\$3.6)</b>	<b>(9,041)</b>	<b>(\$54.7)</b>	<b>(136,863)</b>
<b>Gasoline Stations</b>	<b>(\$4.81)</b>	<b>(12,025)</b>	<b>\$35.2</b>	<b>87,877</b>	<b>\$178.2</b>	<b>445,491</b>
<b>Clothing &amp; Clothing Accessories Stores</b>	<b>(\$17.75)</b>	<b>(44,368)</b>	<b>\$2.2</b>	<b>5,462</b>	<b>(\$146.7)</b>	<b>(366,827)</b>
Clothing Stores	(\$14.88)	(37,201)	(\$7.8)	(19,488)	(\$131.3)	(328,293)
Shoe Stores	(\$4.19)	(10,480)	\$4.1	10,191	(\$9.9)	(24,771)
Jewelry, Luggage, & Leather Goods Stores	\$1.33	3,314	\$5.9	14,760	(\$5.5)	(13,763)
<b>Sporting Goods, Hobby, Book, &amp; Music Stores</b>	<b>(\$12.58)</b>	<b>(31,452)</b>	<b>(\$30.5)</b>	<b>(76,270)</b>	<b>(\$86.2)</b>	<b>(215,469)</b>
Sporting Goods/Hobby/Musical Instrument Stores	(\$13.92)	(34,797)	(\$35.7)	(89,172)	(\$93.2)	(233,109)
Book, Periodical, & Music Stores	\$1.34	3,345	\$5.2	12,902	\$7.1	17,640
<b>General Merchandise Stores</b>	<b>(\$35.65)</b>	<b>(89,118)</b>	<b>(\$35.0)</b>	<b>(87,477)</b>	<b>(\$319.8)</b>	<b>(799,496)</b>
Department Stores Excluding Leased Depts.	(\$10.81)	(27,016)	\$14.5	36,272	(\$78.9)	(197,141)
Other General Merchandise Stores	(\$24.84)	(62,102)	(\$49.5)	(123,749)	(\$240.9)	(602,354)
<b>Miscellaneous Store Retailers</b>	<b>\$2.83</b>	<b>7,066</b>	<b>\$2.6</b>	<b>6,455</b>	<b>(\$4.7)</b>	<b>(11,800)</b>
Florists	\$0.15	366	\$0.5	1,168	\$1.1	2,716
Office Supplies, Stationery, & Gift Stores	\$0.27	676	(\$3.2)	(8,023)	(\$13.1)	(32,629)
Used Merchandise Stores	\$0.31	783	\$3.4	8,381	\$9.7	24,145
Other Miscellaneous Store Retailers	\$2.10	5,240	\$2.0	4,929	(\$2.4)	(6,032)
<b>Nonstore Retailers</b>	<b>\$12.23</b>	<b>30,582</b>	<b>(\$194.0)</b>	<b>(485,105)</b>	<b>(\$525.5)</b>	<b>(1,313,630)</b>
<b>Food Services &amp; Drinking Places</b>	<b>(\$12.87)</b>	<b>(32,166)</b>	<b>(\$76.8)</b>	<b>(191,959)</b>	<b>(\$33.8)</b>	<b>(84,410)</b>
Full-Service Restaurants	(\$16.91)	(42,273)	(\$28.8)	(72,070)	(\$51.4)	(128,518)
Limited-Service Eating Places	\$8.84	22,097	(\$50.9)	(127,245)	\$3.0	7,610
Special Food Services	(\$5.98)	(14,949)	(\$7.7)	(19,290)	(\$14.2)	(35,482)
Drinking Places - Alcoholic Beverages	\$1.18	2,958	\$10.7	26,645	\$28.8	71,980

<sup>1</sup>Potential based on an average annual sales per-square-foot of \$400.  
Source: ESRI Business Analyst ; Houseal Lavigne Associates