



# Landrum Market Analysis Recommendations

*Funding and support generously provided by:*

*Prepared by:*





# *Today's Meeting*

- Process to Date
- Zip Code Survey
- Trade Areas
- Trade Area Demographic
- Market Analysis
  - Leakage
  - Opportunities
- Recommendations





# *Process to Date*

- Reconnaissance of Landrum and surroundings
- Six roundtable meetings with themed stakeholder groups
- Meeting with Planning Commission
- Zip code survey distributed





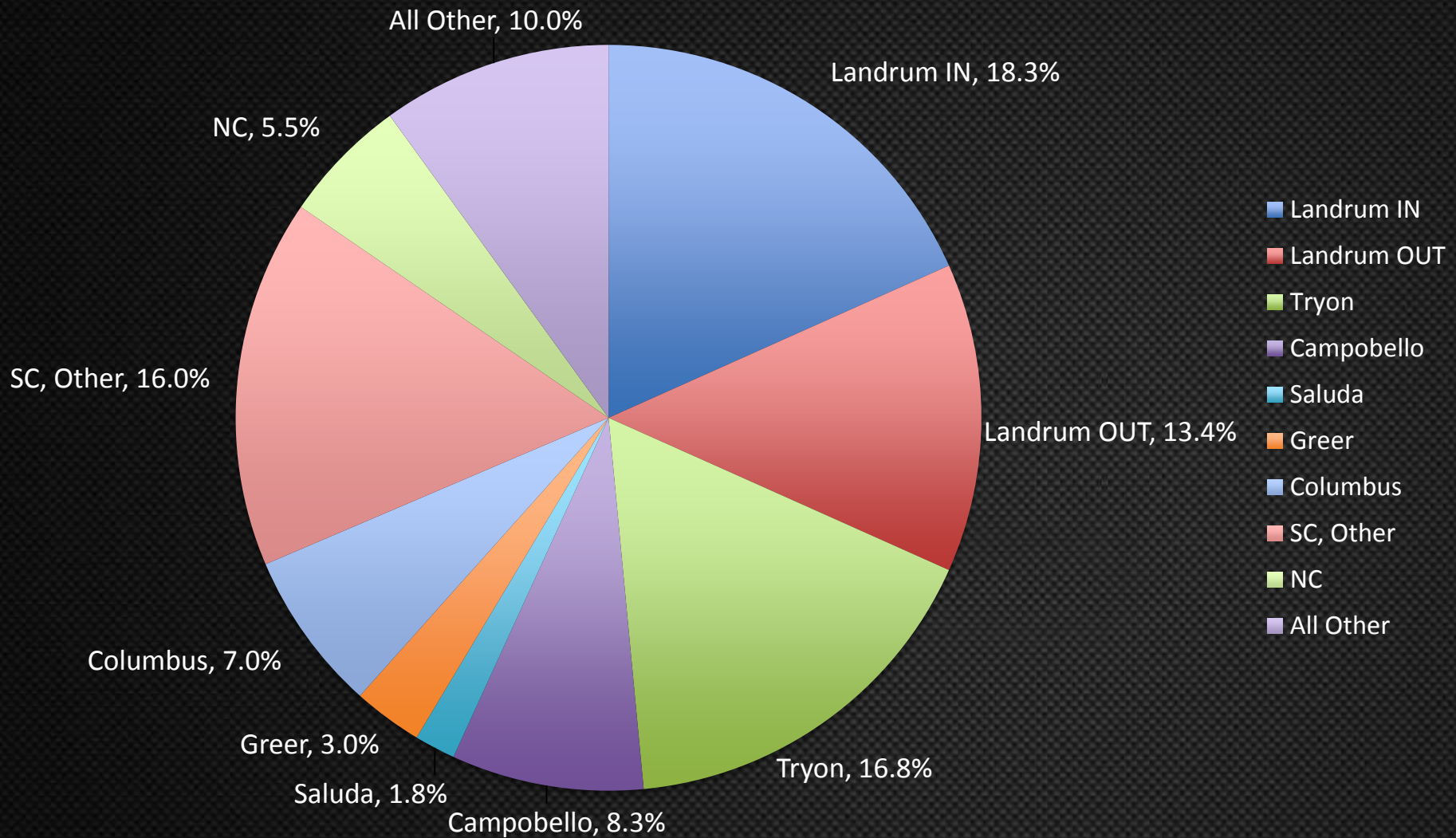
# *Zip Code Survey*

- Survey: November 2 – 10, 2015
- 8 participants tallied
- 732 customer visits
- 140 unique zip codes
- 22 states





# Where are they from?



# The Trade Area Defined

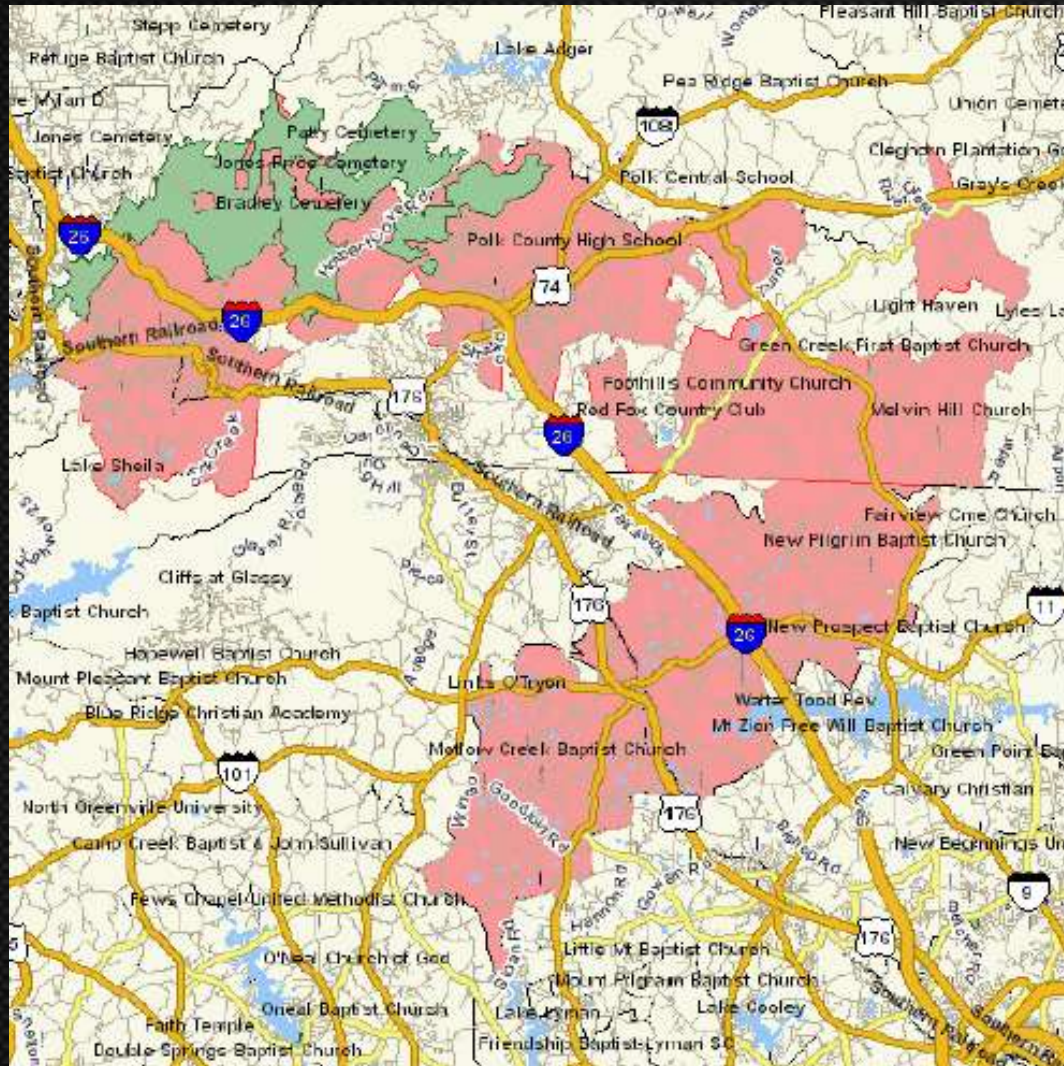


Zip Code	Area	2015 Pop	Visits	Visits/1000 Pop
29356	Landrum	8,422	232	27.55
28782	Tryon	6,237	123	19.72
28722	Columbus	7,011	51	7.27
29322	Campobello	9,226	64	6.94
28773	Saluda	3,006	14	4.66
28756	MILL SPRING	4,558	6	1.32
28160	SPINDALE	4,394	4	0.91
29356	Landrum Unspecified	8,422	6	0.71
29651	Greer	45,952	23	0.50
29369	MOORE	13,867	6	0.43
29365	LYMAN	10,755	4	0.37
29330	COWPENS	8,413	3	0.36
28731	FLAT ROCK	8,549	3	0.35
29303	SPARTANBURG	25,609	6	0.23
28712	BREVARD	19,186	4	0.21
29323	CHESNEE	15,023	3	0.20
29687	TAYLORS	42,759	8	0.19
29316	BOILING SPRINGS	25,095	4	0.16
28739	HENDERSONVILLE	20,156	3	0.15
29681	SIMPSONVILLE	54,526	8	0.15
29690	TRAVELERS REST	22,082	3	0.14
28792	HENDERSONVILLE	33,951	4	0.12
29072	LEXINGTON	56,310	3	0.05
29356 IN	Landrum	2,439	134	54.94
29356 OUT	Landrum	5,983	98	16.38

# Primary Trade Area

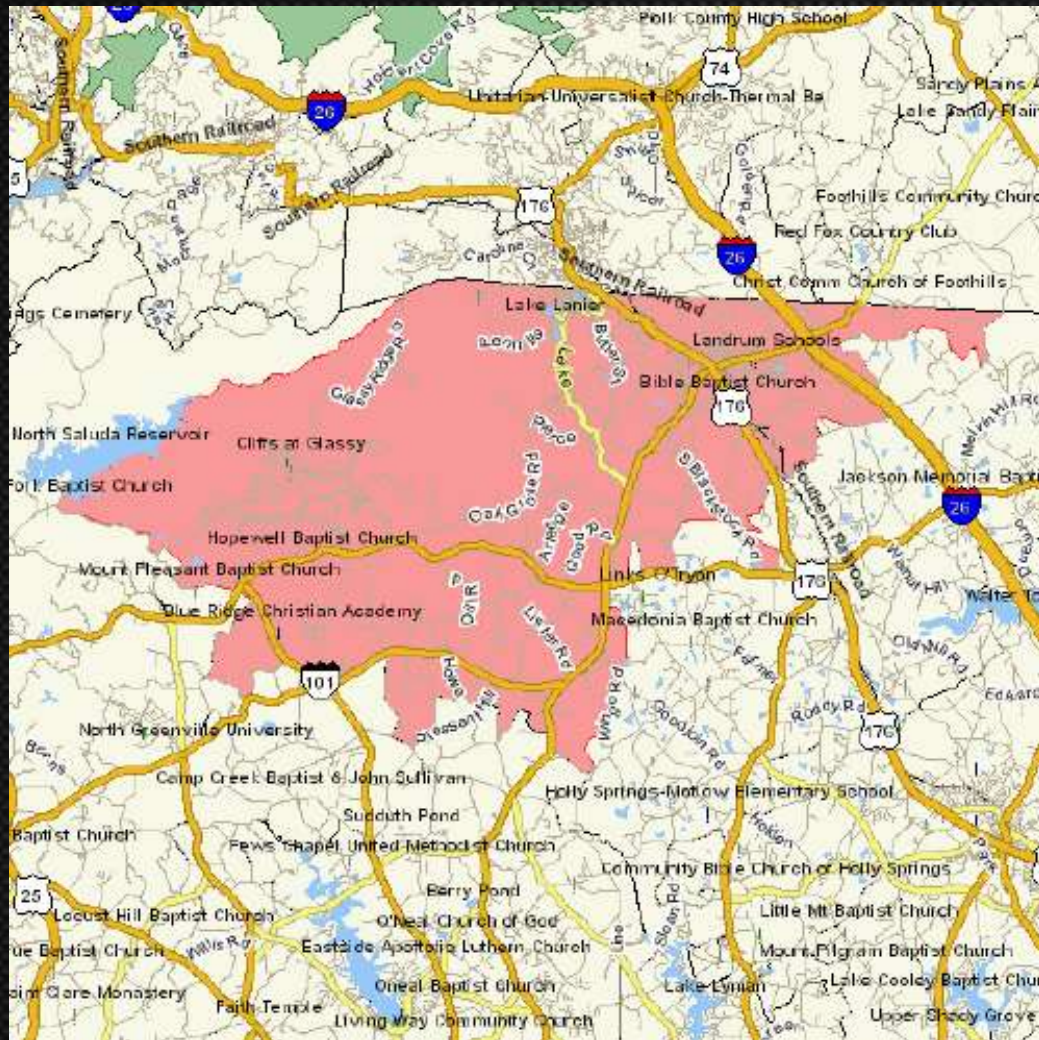


# Secondary Trade Area





# Landrum Zip Code



# Demographics -- Population



- Primary Trade Area
- Secondary Trade Area
- Landrum Zip

Population	
2020 Projection	14,972
2015 Estimate	14,659
2010 Census	14,538
2000 Census	13,922
Growth 2015-2020	2.14%
Growth 2010-2015	0.83%
Growth 2000-2010	4.42%

Population	
2020 Projection	19,744
2015 Estimate	19,243
2010 Census	19,000
2000 Census	16,502
Growth 2015-2020	2.60%
Growth 2010-2015	1.28%
Growth 2000-2010	15.14%

Population	
2020 Projection	8,685
2015 Estimate	8,422
2010 Census	8,243
2000 Census	8,098
Growth 2015-2020	3.12%
Growth 2010-2015	2.17%
Growth 2000-2010	1.79%



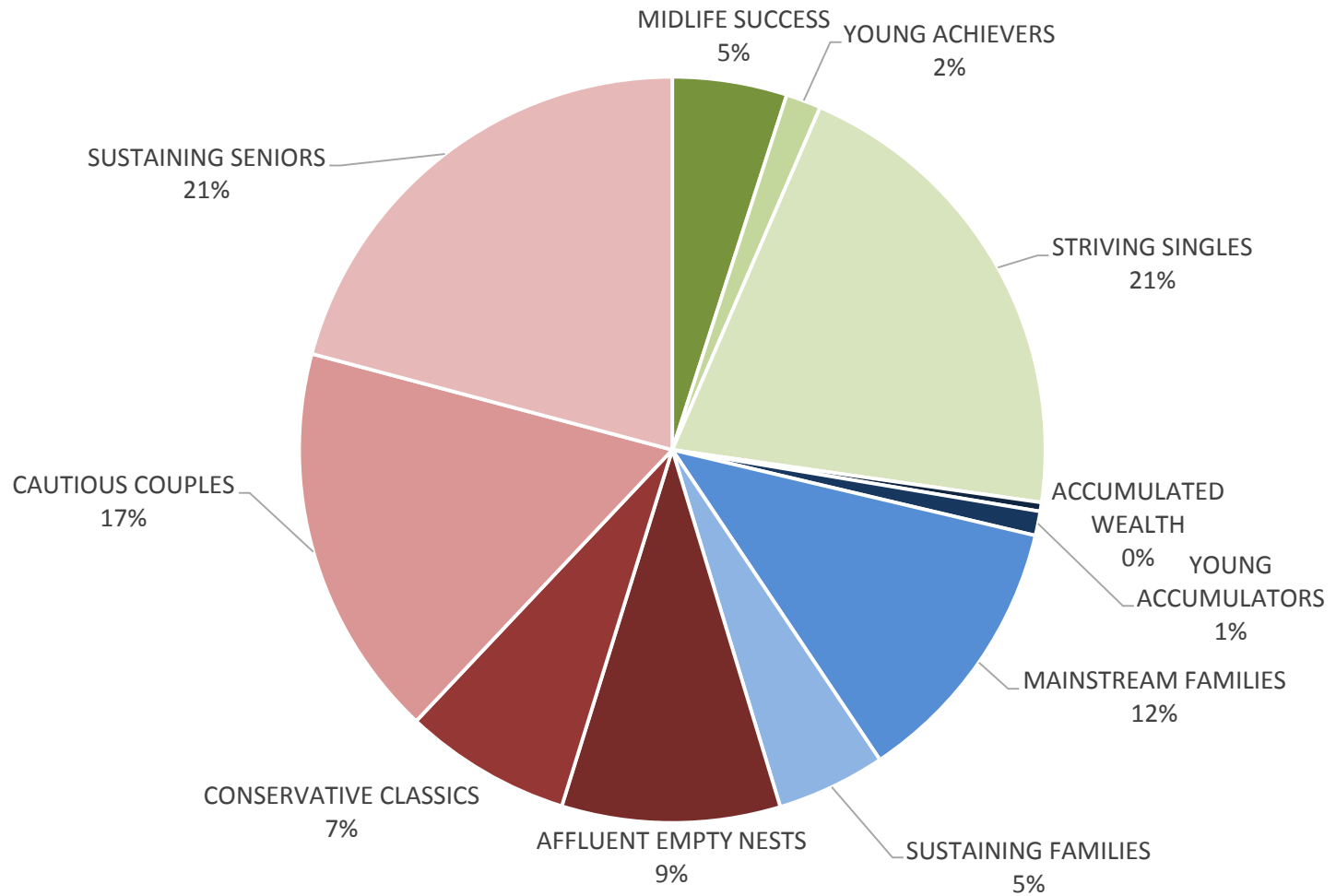


# Demographics – Income

- Primary Trade Area      \$44,942 Med    \$62,481 Avg
- Secondary Trade Area    \$43,423 Med    \$54,727 Avg
- Landrum Zip              \$46,402 Med    \$65,600 Avg
- Spartanburg              \$42,919 Med    \$60,115 Avg
- South Carolina          \$43,916 Med



# PTA Psychographics





# *Retail Leakage Study*

A study to establish the retail dollars leaving or entering a community from its primary and secondary trade areas.



# *Trade Areas – At a Glance*

- PTA Stores sold \$151,113,124
- PTA Consumers spent \$268,533,367
- Primary Trade Area **LEAKED \$117,400,243** overall in the previous year.
  
- STA Stores sold \$191,800,667
- STA Consumers spent \$320,674,084
- Secondary Trade Area **LEAKED \$128,873,417** last year.

# Trade Areas – Market Analysis



Opportunity Gap - Retail Stores	PTA			STA		
	(Consumer Expenditures)	(Retail Sales)	Leakage (Inflow)	(Consumer Expenditures)	(Retail Sales)	Leakage (Inflow)
<b>Total Retail Sales Incl Eating and Drinking Places</b>	<b>268533367</b>	<b>151133124</b>	<b>117,400,243</b>	<b>320674084</b>	<b>191800667</b>	<b>128,873,417</b>
<b>Motor Vehicle and Parts Dealers-441</b>	<b>52348083</b>	<b>5904857</b>	<b>46,443,226</b>	<b>61551510</b>	<b>13650174</b>	<b>47,901,336</b>
Automotive Dealers-4411	42059845	5304250	36,755,595	49508006	10033911	39,474,095
Other Motor Vehicle Dealers-4412	6231475	117109	6,114,366	7297335	2482720	4,814,615
Automotive Parts/Accesss, Tire Stores-4413	4056763	483498	3,573,265	4746169	1133543	3,612,626
<b>Furniture and Home Furnishings Stores-442</b>	<b>5014349</b>	<b>2695252</b>	<b>2,319,097</b>	<b>5728766</b>	<b>2315434</b>	<b>3,413,332</b>
Furniture Stores-4421	2593238	2010582	582,656	2949588	1133472	1,816,116
Home Furnishing Stores-4422	2421111	684670	1,736,441	2779178	1181962	1,597,216
<b>Electronics and Appliance Stores-443</b>	<b>4429685</b>	<b>586548</b>	<b>3,843,137</b>	<b>5152607</b>	<b>995759</b>	<b>4,156,848</b>
Appliances, TVs, Electronics Stores-44311	3471472	279320	3,192,152	4047550	767066	3,280,484
Household Appliances Stores-443111	641298	0	641,298	753747	125834	627,913
Radio, Television, Electronics Stores-443112	2830174	279320	2,550,854	3293803	641232	2,652,571
Computer and Software Stores-44312	856804	307228	549,576	987469	228693	758,776
Camera and Photographic Equipment Stores-44313	101409	0	101,409	117588	0	117,588
<b>Building Material, Garden Equip Stores -444</b>	<b>28842702</b>	<b>19524362</b>	<b>9,318,340</b>	<b>33538332</b>	<b>10182172</b>	<b>23,356,160</b>
Building Material and Supply Dealers-4441	24348854	14427320	9,921,534	28244572	7704556	20,540,016
Home Centers-44411	9761055	1050236	8,710,819	11311397	252692	11,058,705
Paint and Wallpaper Stores-44412	425833	451228	(25,395)	480483	0	480,483
Hardware Stores-44413	2382023	3504318	(1,122,295)	2819075	1444123	1,374,952
Other Building Materials Dealers-44419	11779943	9421538	2,358,405	13633617	6007741	7,625,876
Building Materials, Lumberyards-444191	4371306	3523697	847,609	5086814	2246921	2,839,893
Lawn, Garden Equipment, Supplies Stores-4442	4493848	5097042	(603,194)	5293760	2477616	2,816,144
Outdoor Power Equipment Stores-44421	1626721	123944	1,502,777	1892999	230180	1,662,819
Nursery and Garden Centers-44422	2867127	4973098	(2,105,971)	3400761	2247436	1,153,325



# Trade Areas – Market Analysis



Opportunity Gap - Retail Stores	PTA			STA		
	(Consumer Expenditures)	(Retail Sales)	Leakage (Inflow)	(Consumer Expenditures)	(Retail Sales)	Leakage (Inflow)
<b>Food and Beverage Stores-445</b>	<b>34159444</b>	<b>30904902</b>	<b>3,254,542</b>	<b>41889060</b>	<b>47624328</b>	<b>(5,735,268)</b>
Grocery Stores-4451	21943670	18954643	2,989,027	27170773	31468329	(4,297,556)
Supermarkets, Grocery (Ex Conv) Stores-44511	20487745	16366297	4,121,448	25343773	28921991	(3,578,218)
Convenience Stores-44512	1455925	2588346	(1,132,421)	1827000	2546338	(719,338)
Specialty Food Stores-4452	2605403	104942	2,500,461	3242775	506746	2,736,029
Beer, Wine and Liquor Stores-4453	9610371	11845317	(2,234,946)	11475512	15649253	(4,173,741)
<b>Health and Personal Care Stores-446</b>	<b>17686925</b>	<b>40281922</b>	<b>(22,594,997)</b>	<b>21073132</b>	<b>53801712</b>	<b>(32,728,580)</b>
Pharmacies and Drug Stores-44611	14295508	19192435	(4,896,927)	17027058	50008062	(32,981,004)
Cosmetics, Beauty Supplies, Perfume Stores	1264389	6426250	(5,161,861)	1503112	0	1,503,112
Optical Goods Stores-44613	549106	3116190	(2,567,084)	659882	3470165	(2,810,283)
Other Health and Personal Care Stores-44619	1577922	11547047	(9,969,125)	1883080	323485	1,559,595
<b>Gasoline Stations-447</b>	<b>26347927</b>	<b>20988476</b>	<b>5,359,451</b>	<b>32567385</b>	<b>32154376</b>	<b>413,009</b>
Gasoline Stations With Conv Stores-44711	19263362	20463550	(1,200,188)	23898837	23957145	(58,308)
Other Gasoline Stations-44719	7084565	524926	6,559,639	8668548	8197231	471,317
<b>Clothing and Clothing Accessories Stores-448</b>	<b>10492818</b>	<b>682140</b>	<b>9,810,678</b>	<b>12147432</b>	<b>99653</b>	<b>12,047,779</b>
Clothing Stores-4481	5333012	359353	4,973,659	6516004	98907	6,417,097
Men's Clothing Stores-44811	261244	0	261,244	311828	0	311,828
Women's Clothing Stores-44812	1188777	204374	984,403	1441205	0	1,441,205
Childrens, Infants Clothing Stores-44813	309082	0	309,082	399901	0	399,901
Family Clothing Stores-44814	2864717	93029	2,771,688	3506012	16955	3,489,057
Clothing Accessories Stores-44815	232898	0	232,898	281230	39507	241,723
Other Clothing Stores-44819	476294	61950	414,344	575828	42445	533,383
Shoe Stores-4482	802557	49201	753,356	1016869	0	1,016,869
Jewelry, Luggage, Leather Goods Stores-4483	4357249	273586	4,083,663	4614559	746	4,613,813
Jewelry Stores-44831	3921792	273586	3,648,206	4090316	746	4,089,570
Luggage and Leather Goods Stores-44832	435457	0	435,457	524243	0	524,243





# Trade Areas – Market Analysis



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	(Consumer Expenditures)	(Retail Sales)	Leakage (Inflow)	(Consumer Expenditures)	(Retail Sales)	Leakage (Inflow)
<b>Sporting Goods, Hobby, Book, Music Stores-451</b>	<b>4308625</b>	<b>5350503</b> ✓	<b>(1,041,878)</b>	<b>5106486</b>	<b>3612472</b> ✓	<b>1,494,014</b>
Sporting Goods, Hobby, Musical Inst Stores-4511	3780767	5281941 ✓	(1,501,174)	4507697	3597027 ✓	910,670
Sporting Goods Stores-45111	1938738	2108542 ✓	(169,804)	2333633	1579257 ✓	754,376
Hobby, Toys and Games Stores-45112	1063120	0 ✓	1,063,120	1270770	37185 ✓	1,233,585
Sew/Needlework/Piece Goods Stores-45113	386394	354463 ✓	31,931	461207	0 ✓	461,207
Musical Instrument and Supplies Stores-45114	392515	2818936 ✓	(2,426,421)	442087	1980585 ✓	(1,538,498)
Book, Periodical and Music Stores-4512	527858	68562 ✓	459,296	598789	15445 ✓	583,344
Book Stores and News Dealers-45121	443860	68562 ✓	375,298	502599	15445 ✓	487,154
Book Stores-451211	382734	68562 ✓	314,172	429005	15445 ✓	413,560
News Dealers and Newsstands-451212	61126	0 ✓	61,126	73594	0 ✓	73,594
Prerecorded Tapes, CDs, Record Stores-45122	83998	0 ✓	83,998	96190	0 ✓	96,190
<b>General Merchandise Stores-452</b>	<b>29406752</b>	<b>11178448</b> ✓	<b>18,228,304</b>	<b>35864913</b>	<b>6531571</b> ✓	<b>29,333,342</b>
Department Stores Excl Leased Depts-4521	11903955	732081 ✓	11,171,874	14480859	385366 ✓	14,095,493
Other General Merchandise Stores-4529	17502797	10446367 ✓	7,056,430	21384054	6146205 ✓	15,237,849
	7267004	2327791 ✓	4,939,213	8723342	1603664 ✓	7,119,678
<b>Miscellaneous Store Retailers-453</b>	<b>273593</b>	<b>88950</b> ✓	<b>184,643</b>	<b>319368</b>	<b>52155</b> ✓	<b>267,213</b>
Florists-4531	3179444	682494 ✓	2,496,950	3732282	1151952 ✓	2,580,330
Office Supplies, Stationery, Gift Stores-4532	1547746	58447 ✓	1,489,299	1785830	515061 ✓	1,270,769
Office Supplies and Stationery Stores-45321	1631698	624047 ✓	1,007,651	1946452	636891 ✓	1,309,561
Gift, Novelty and Souvenir Stores-45322	445285	251930 ✓	193,355	528023	55795 ✓	472,228
Used Merchandise Stores-4533	3368682	1304417 ✓	2,064,265	4143669	343762 ✓	3,799,907
Other Miscellaneous Store Retailers-4539	23014090	3463813 ✓	19,550,277	27382709	2257344 ✓	25,125,365
<b>Non-Store Retailers-454</b>	<b>33944290</b>	<b>12341980</b>	<b>21,602,310</b>	<b>27382709</b>	<b>2257344</b> ✓	<b>25,125,365</b>



# Trade Areas – Market Analysis



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<b>Foodservice and Drinking Places-722</b>	<b>25214963</b>	<b>7244110</b> ✓	<b>17,970,853</b>	<b>29948410</b>	<b>16972008</b> ✓	<b>12,976,402</b>
Full-Service Restaurants-7221	11337055	6563315 ✓	4,773,740	13408883	6757805 ✓	6,651,078
Limited-Service Eating Places-7222	10002484	0 ✓	10,002,484	11936146	7555478 ✓	4,380,668
Special Foodservices-7223	2767845	680795 ✓	2,087,050	3299339	2658725 ✓	640,614
Drinking Places -Alcoholic Beverages-7224	1107579	0 ✓	1,107,579	1304042	0 ✓	1,304,042
<b>GAFO *</b>	<b>56831673</b>	<b>21175385</b> ✓	<b>35,656,288</b>	<b>67732486</b>	<b>14706841</b> ✓	<b>53,025,645</b>
General Merchandise Stores-452	29406752	11178448 ✓	18,228,304	35864913	6531571 ✓	29,333,342
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# *Retail Observations*

- Visitor traffic in Landrum is strong - particularly from Upstate South Carolina
- Landrum zip code residents loyal to downtown businesses
- Opportunity for further influence in Tryon, Campobello, Saluda, & Columbus
- Opportunity to enhance local business through retail leakage



# *Housing Observations*

- Landrum's market area has grown and is expected to grow at a fairly conservative pace.
- The community is projected to add 28 households per year over the next five years. (25 of these will be family households)
- Demographics point to an ageing population base as median age is 47 compared with 37 nationally.
- 78% of the housing units in the trade area are over 25 years old with a median year built of 1980.
- 15% of the housing units are mobile homes.





# *Recommendations*

- Continue to aggressively promote Landrum as a visitor destination:
  - Through regional efforts
  - Cooperative marketing among existing merchants
  - Leveraging County Tourism where possible





Whiskey Galore  
**May 3 @ 6:00 pm - 8:00 pm**

Tryon Fine Arts Film  
 Series showing of  
 Local Hero  
**May 3 @ 7:00 pm - 9:00 pm**

Tryon Farmer's Market  
**May 4 @ 9:00 am - 12:00 pm**

BRHJ Mother's Day  
 Celebration Horse  
 Show at Harmon Field  
**May 6 @ 8:00 am - May 8 @ 7:00 pm**

[View All Events](#)





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- Continue to aggressively promote Landrum as a visitor destination:
  - Through regional efforts
  - Cooperative marketing among existing merchants
  - Leveraging County Tourism where possible
- Examine opportunities for joint marketing of restaurant options in Landrum to cultivate the community as a dining destination.



# MAY WE HAVE THIS DANCE?



## BULLDOG BRUNCH & BROWSE

### SUNDAY SHOPPING HOURS

# 10am-1pm

## MARCH MADNESS EDITION

POWERED BY **HISTORIC STARKVILLE**  
MISSISSIPPI'S COLLEGE TOWN

Enjoy SUNDAY shopping at these participating shops! [www.starkville.org](http://www.starkville.org)





# Recommendations

- Continue to aggressively promote Landrum as a visitor destination:
  - Through regional efforts
  - Cooperative marketing among existing merchants
  - Leveraging County Tourism where possible
- Examine opportunities for joint marketing of restaurant options in Landrum to cultivate the community as a dining destination.
- Actively work with property owners at Exit 1 to promote quality infill development.
  - Keep ongoing dialogue with property owners/Spartanburg County
  - Ensure that policies encourage sensitive infill development
  - Pursue mid-range hotel







# *Recommendations*

- Consider “more to explore” wayfinding signs to make sure visitors know all of Landrum.





SHELBY  
*Life. In Perfect Harmony.*





**more to  
enjoy**



**On West Court St.**

**Christopher Ashley Salon**

**DomeniCo. Salon**

**The Poinsett Bride**

**downtown**



visit

visitor's  
center





# *Recommendations*

- Consider “more to explore” wayfinding signs to make sure visitors know all of Landrum.
- While no defined market demand exists for a “big box” retail store, Landrum should consider a regulatory framework to reflect resident desires regarding such a store.
- Pursue an “infill housing” policy that encourages sensitive housing within the town of Landrum on vacant and underutilized sites focusing on:
  - Active empty nest living
  - Starter housing



# Infill Design Toolkit – A Guide to Integrating Infill

