

**ECONOMIC DEVELOPMENT MARKET STUDY  
LEE'S SUMMIT, MISSOURI**

2015-2016

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# **NORTH STAR DESTINATION STRATEGIES**

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**COMMUNITY MARKETING AND COMMERCIAL REAL ESTATE RESEARCH AND ANALYSIS**

## **ECONOMIC DEVELOPMENT MARKET STUDY LEE'S SUMMIT, MISSOURI**

2015-2016

Prepared for:

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Report Compiled by:

Lee's Summit Economic Development Council

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# NORTH STAR DESTINATION STRATEGIES

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COMMUNITY MARKETING AND COMMERCIAL REAL ESTATE RESEARCH AND ANALYSIS

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## INTRODUCTION

About North Star, Lee's Summit and this Project

North Star Destination Strategies has been working exclusively with communities for more than a decade, helping them uncover, define, implement and integrate their own unique competitive identities.

In 2011, the City of Lee's Summit, MO partnered with North Star on a community branding project. Through comprehensive research, the initiative uncovered a competitive identity based on Lee's Summit's most relevant and distinct promise to its stakeholders—those who live, work and play in Lee's Summit. The strategic platform that resulted from the initiative states, "For those seeking unassuming, community-minded neighbors, Lee's Summit, the highest point between Kansas City and St. Louis, affords you a broader perspective on what's important so you can go above and belong." The tagline chosen to represent the brand positioning is "Yours Truly."

In 2014, Lee's Summit again partnered with North Star to evaluate brand marketing efforts and awareness by understanding current public perceptions of Lee's Summit and the extent to which Lee's Summit's reputation has changed since marketing efforts were put into place. The insights gleaned from North Star's in-depth process of analyzing the resulting data illustrated the extent to which branding efforts have been successful in influencing public perceptions of Lee's Summit and the extent to which Lee's Summit's brand image has changed.

In 2015, the Lee's Summit Chamber and Lee's Summit Economic Development Council again enlisted North Star's expertise to conduct economic development market research. The data identified industries and industry clusters that are best suited to Lee's Summit's existing business climate based on a variety of factors including regional growth industries, workforce attributes and demographic and household data. The research identified Lee's Summit's labor force and consumption profile utilizing data gathered from Environmental Systems Research Institute Inc. (ESRI), Tapestry Profile, which incorporates more than 200 geo-demographics, socio-economic, lifestyle, workforce and psychographic data points.

North Star's research is designed to help the Lee's Summit economic development team hone in on the most qualified business prospects nationwide using a variety of findings uncovered by traditional studies such as cluster analysis and targeting.

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## **PURPOSE AND METHODOLOGY**

North Star's research is designed to uncover industries and clusters that best correspond and complement successful, high growth industries in Lee's Summit, Missouri. This research component should be used to identify potential business prospects for recruitment, expansion or retention efforts based on industries that are succeeding in Lee's Summit and in communities with a similar economic and psychographic footprint. This data can be used to assist economic development professionals and leadership within the area to actively recruit businesses and industries to the City of Lee's Summit.

Using data gathered from Environmental Systems industries (ESRI), North Star developed a demographic and psychographic profile for Lee's Summit. North Star then identified complementary communities that most closely share similar consumer characteristics. Using the Bureau of Labor Statistics, Quarterly Census of Employment and Wages data, North Star identified the top growth industries.

North Star's approach was to examine long run and short-run net positive growth exhibited by industry sectors in terms of employment, firms and wages. From this analysis, North Star determined the top industry sectors—listed using the North American Industry Classification System (NAICS)—within Lee's Summit's economic landscape. These industries were then compared to those of complementary communities around the country. This allows researchers to compare Lee's Summit's economic growth to communities with similar economic profiles as well as determine other high potential industries that may not have been targeted previously.

North Star combined Lee's Summit's top NAICS codes and the city's workforce characteristics (using Resident Tapestry data derived from ESRI) to define a list of targeted industries that best match the city's existing business assets and labor market strengths.

For additional information and a full description of NAICS codes, see:  
<http://www.census.gov/eos/www/naics/> .

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## **STUDY SUMMARY**

The 2015-2016 Lee's Summit Economic Development Market study provided fundamental information about the Lee's Summit community and its demographic profile, its general business climate and employment base, as well as potential areas of growth and investment.

The data helped identify significant industry clusters, including advanced manufacturing and technology as well as aviation-related companies. In addition, Lee's Summit's core demographic profile has shifted slightly in the years after the Great Recession with the rise of the dual income, community-minded "Soccer Mom Family."

The information obtained from this market study will help the Lee's Summit Economic Development Council fine-tune its economic development strategy to attract new industry to Lee's Summit while identifying growth opportunities.

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## **Lee's Summit Business Landscape**



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## LEE'S SUMMIT BUSINESS LANDSCAPE

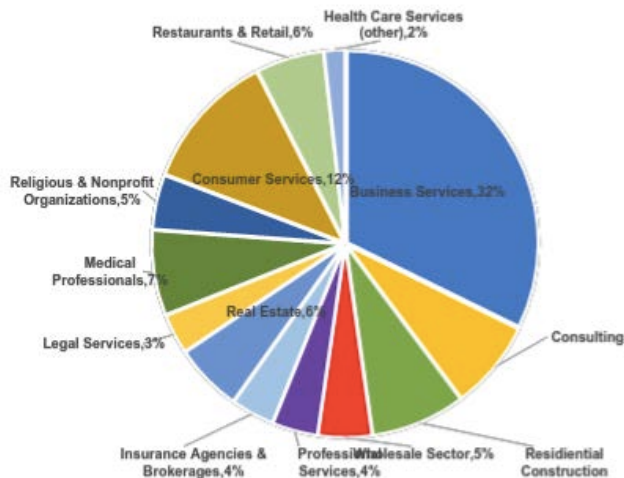
### TOP INDUSTRIES: FIRMS

North Star identified successful, high growth industries in Lee's Summit, Missouri. The data should be considered an important first step when targeting companies for economic development recruitment, expansion and retention efforts.

As part of the review of Lee's Summit's businesses, North Star conducted a review of all businesses that were either a headquarters or single location within the city limits utilizing our Dun & Bradstreet database. This resulted in the identification of approximately 5,700 companies with the top industries represented in the graph below.

Lee's Summit's top growth industries are in the business services and consulting services in management services that includes health care and financial management. Together, they account for nearly 39 percent of the city's businesses. The top growth sectors account for approximately 40 percent of all businesses in the city, as indicated in the pie chart below. *Note: Information is based on Dun & Bradstreet (D&B) business research and profiling.*

### Lee's Summit Top Industries: Firms



Number of Companies by Top Industry	
Business Services	1,053
Consulting Services	246
Residential Construction Contractors	261
Wholesale Sector	148
Professional Services	126
Insurance Agencies & Brokerages	120
Real Estate	188



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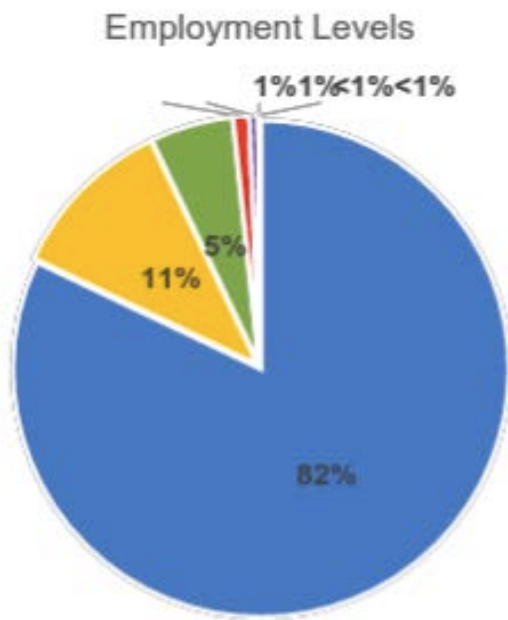
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## LEE'S SUMMIT BUSINESS LANDSCAPE

### TOP INDUSTRIES: EMPLOYMENT

With a total of 5,718 business licenses issued, the overwhelming majority of Lee's Summit companies (4,168) employ fewer than four employees, followed by companies who fall into the 5-10 employee range (550). Approximately 275 companies employ 11-49 people, with 86 having 50 or more employees.

Employment Level by Company	
< 4	4,168
5 - 10	550
11 - 49	275
50 - 99	52
100 - 499	30
500 - 999	2
1,000 - 4,999	2



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## LEE'S SUMMIT BUSINESS LANDSCAPE TOP INDUSTRIES: REVENUE

Over 94 percent of Lee's Summit businesses report revenue below \$1 million. These are typically small businesses and enterprises that may be indicative of an entrepreneurial climate. A small portion of businesses in (5%) report revenue between \$1 – \$5 million. According to Dun & Bradstreet, a little over one percent of companies in Lee's Summit (1.3%) indicated having revenue over \$5 million.

Revenue	
< \$1 million	4,860
\$1 - 5 million	235
\$5 - \$10 million	36
\$10 - \$50 million	26
\$50 - \$500 million	6
> \$1 billion	1

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## LEE'S SUMMIT BUSINESS LANDSCAPE TOP INDUSTRIES FOR RECRUITMENT BY NAICS CODE

NAICS Code	Industry
5415	Computer systems design and related services
5511	Management of companies and enterprises
5242	Insurance agencies and brokerages
48 & 49 (48412,486, 493)	Transportation & warehousing
5412, 54133, 54138, 5414, 5416, 5417	Professional, scientific, and technical services
6215, 623	Medical and diagnostic Laboratories/Nursing & Residential care
51 (5112, 51821)	Information sectors, particular related software and data warehousing
52232, 523, 524,525	Finance and Insurance
332	Fabricated metal manufacturing
311/312	Ag/food manufacturing
325/33911	Chemical manufacturing/pharma/medical device

### Lee's Summit Top Industries: Conclusion

Given that a large percentage of Lee's Summit businesses operate with fewer than four employees, North Star concluded that the heart of the city's economic landscape is paved with small businesses and entrepreneurial enterprises.

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## **Jackson County Economic Landscape**

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## COUNTY AND STATE ECONOMIC LANDSCAPE REGIONAL PERFORMANCE OUTCOMES

### Jackson County, Mo. and the State of Missouri

Regional economic performance can be measured by indicators of overall performance directly related to the standard of living in a region, as well as intermediate indicators of economic activity that may or may not translate into a region's standard of living. Below find data on a variety of factors from 1998-2014 for Jackson County and the State of Missouri in benchmarks ranging from workforce to innovation.

Key takeaways from the data for Jackson County, Mo:

- Private wage growth** rose 2.54 percent, ranking Jackson County 8<sup>th</sup> among counties tracked.
- GDP per capita** dropped by .02 percent, to \$48, 697.
- The employment rate** dropped just .37 percent, at No. 2 among peers, with a workforce of 328,883.
- The poverty rate** rose 5.2 percent, with 16.5 percent of residents living in poverty.
- Innovation growth rate** was 2.55 percent, with 1.91 utility patents per 10,000 employees (2005-2011)
- The total number of business establishments** dropped by 116, with 17,961 total businesses.

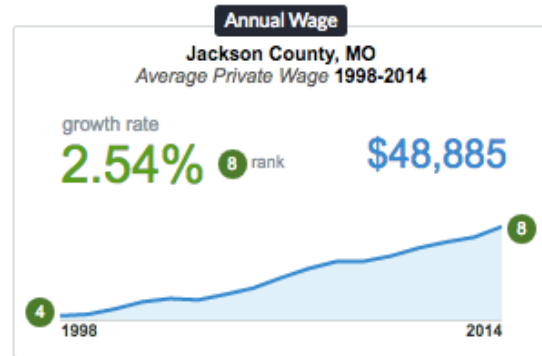
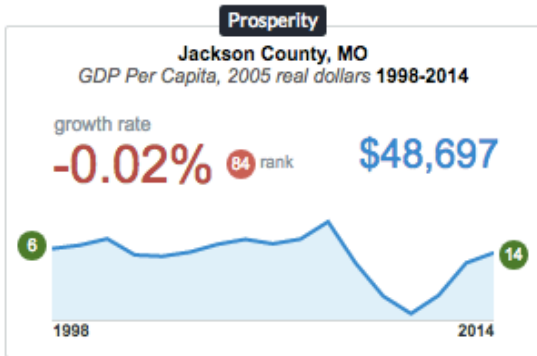
Key takeaways for the State of Missouri:

- The labor force participation rate** dropped by almost 6 percent, at 81.64 percent participation.
- The unemployment rate** rose by almost 2 percent, to 6.15 percent.
- Labor force productivity** rose .76 percent, to \$75,367 GDP per worker.
- Exports as a percent of GDP** rose 4.7 percent to 6.17 percent.

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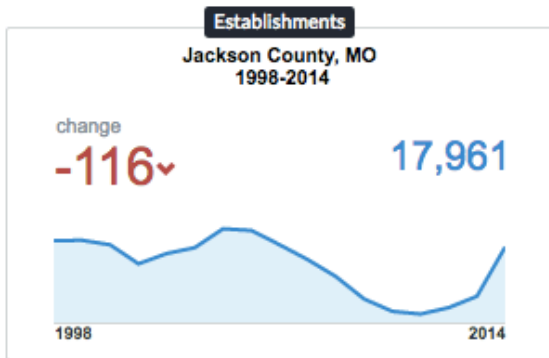
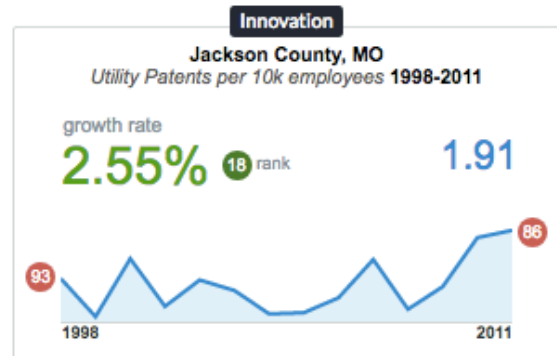
## Outcomes



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## Intermediate Outcomes



## International Trade & Investment



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## COUNTY AND STATE ECONOMIC LANDSCAPE BUSINESS ENVIRONMENT

### Jackson County, Mo. and the State of Missouri

The first key driver of regional economic performance is the quality of a region's business environment, which is shaped by policy and firm behavior. Below find data on a variety of factors from 1998-2014 for Jackson County and the State of Missouri in benchmarks ranging from tax rates, venture capital expenditures and advanced degrees awarded.

Key takeaways from the data for Jackson County, Mo:

Areas of significant growth or strength compared to peer counties or states noted in blue.

- **Venture Capital** expenditures were \$65 per \$10,000 GDP, an 86.52 percent growth rate, ranking the county 9<sup>th</sup> among peer counties.
- **Percentage of population receiving a high school diploma or more** was 88.70 percent, higher than the U.S. average of 86.33 percent, ranking the county 34<sup>th</sup> among peers.
- **Percentage of population with some college of Associates Degree or more** was 59.21 percent, higher than the U.S. average of 58.37 percent, ranking the county 20<sup>th</sup> among peers.
- **Percentage of population completing a Bachelor's Degree or more** rose 28 percent, slightly lower than the U.S. average of 29.28 percent, ranking the county 16<sup>th</sup> among peers.
- **The percentage of traded employment in strong clusters** was 44.17 percent, a growth rate of 1.26 percent.
- **Manufacturing jobs as a percentage of all jobs** was 6.49 percent, a decrease of 2.44 percent.

Key takeaways for the State of Missouri:

- **Research and development expenditure** per capita was \$1,312, an 8.84 percent growth rate, ranking the state 4<sup>th</sup> among peer states.
- **Federal funding for R&D per capita** was \$92, a 3.85 percent growth rate.
- **The number of science and engineering degrees** awarded was 17,390, for a 28<sup>th</sup> ranking.
- **The number of advanced scientific workers** rose by .18 percent, for a 2.90 percent growth rate, ranking the state 16<sup>th</sup> among peers.
- **The percent of workers represented by unions** was 7.47 percent, a decline of 4.03 percent, ranking Missouri 7<sup>th</sup> among peers.
- **State and local taxes as a percent of GDP** were 9.23 percent, ranking the state 25<sup>th</sup> among peers.
- **Corporate taxes as a percent of GDP** were .20 percent, ranking the state 11<sup>th</sup> among peers.



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## Factor Input Conditions

### R&D Expenditure per Capita



### Federal Funding for R&D per Capita



### Venture Capital



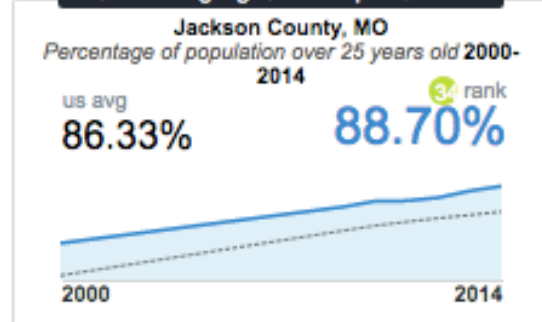
### Scientific Degrees Awarded



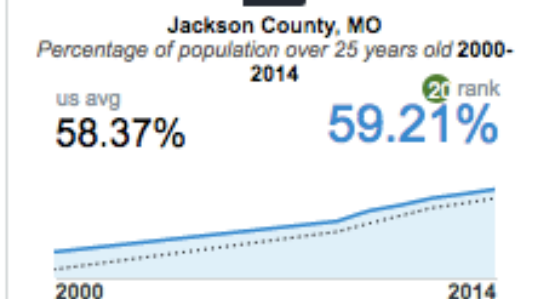
### Advanced Scientific Workers



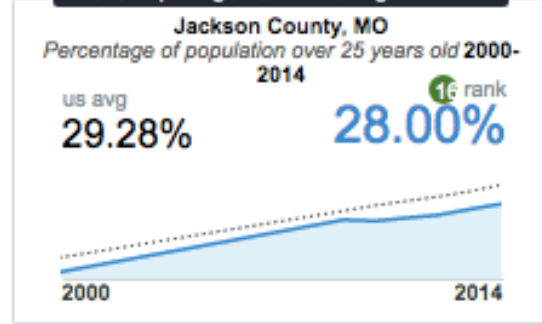
### Total Receiving High School Diploma or More



### Total with Some College or Associates Degree or More



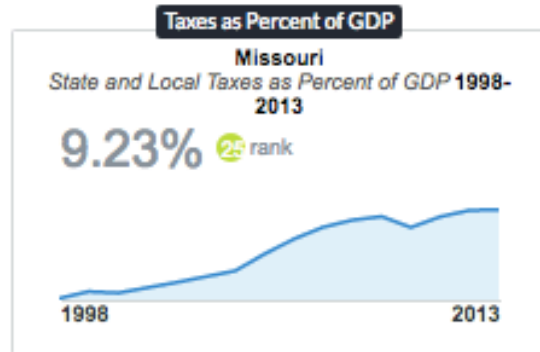
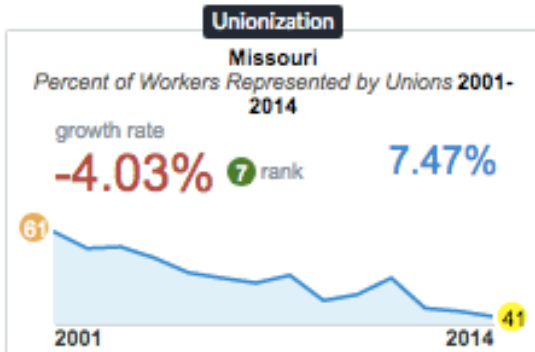
### Total Completing a Bachelor's Degree or More



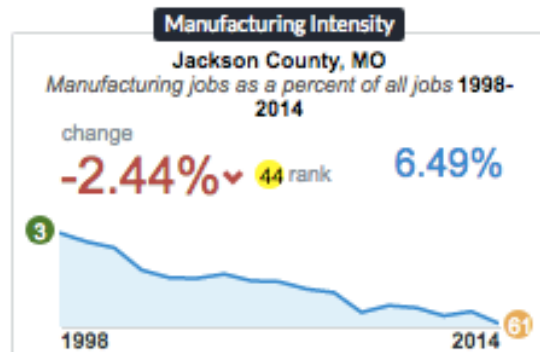
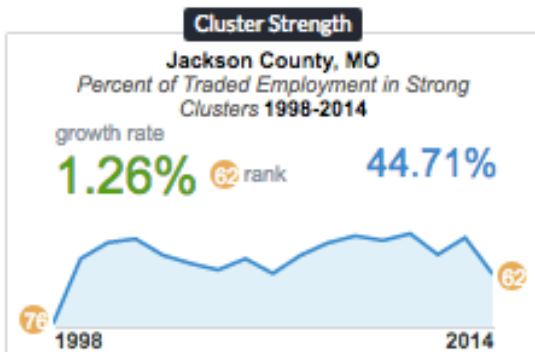
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## Context for Firm Strategy and Rivalry



## Related or Supporting Industries



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## COUNTY AND STATE ECONOMIC LANDSCAPE TAX CLIMATE & FISCAL RESPONSIBILITY

### TAX CLIMATE

#### State Business Tax Climate Index 2015

State	Overall Rank
Missouri	17
Kansas	22
Oklahoma	32

#### State and Local Tax Burden

State	Total Taxes Paid per Capita	Rank (1 is Highest Taxes)
Missouri	\$2,298	33
Kansas	\$2,566	24
Oklahoma	\$2,143	34

Source: The Tax Foundation

### FISCAL RESPONSIBILITY

#### State Debt per Capita (FY2010)

State	State Debt per Capita	Rank (1 is Highest Debt)
Missouri	\$3,416	26
Kansas	\$2,276	37
Oklahoma	\$2,664	34

Source: The Tax Foundation

#### Missouri Credit Ratings

Moody's	Standard & Poor's	Fitch
AAA	AAA	AAA

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## COUNTY AND STATE ECONOMIC LANDSCAPE TAX SUMMARY

### TAX SUMMARY

	MISSOURI	KANSAS	OKLAHOMA
CORPORATE INCOME (EXCISE) TAX AND FRANCHISE TAXES	Corporate Income Tax Rate: 6.25% Franchise Tax: The franchise tax rate is 1/1150 of 1% (.00067) for tax year 2015, and 0% for tax year 2016 and thereafter.	Corporate Income Tax Rate: 4% Franchise Tax: There is no franchise tax after 2010	Corporate Income Tax Rate: 6% Franchise Tax: \$1.25 for each \$1,000 of capital invested or used in Oklahoma
INDIVIDUAL INCOME TAX ON WAGES	Tiered beginning at 1.5% for the first \$1,000 of income. Income of over \$9,000 is taxed at 6%.	Taxed at a rate of 2.7% for \$15,000 and below. All income above \$15,000 is taxed at 4.6%	Six tiers up to \$8,700 in income All income above \$8,700 is taxed at 5.25%.
SALES TAX	State sales tax rate is 4.225% Local rates can push the total rate to 10.863%	State sales tax rate is 6.15% Local rates can push the total rate to 9.8%	State sales tax rate is 4.5% County rate up to 2% City rate up to 5%
PROPERTY TAX	Property is taxed at the local level.	Property is taxed at the local level.	Property is taxed at the local level.
UNEMPLOYMENT INSURANCE TAX	Taxable wage base: \$13,000 New employer rate: 2.7% Experienced rate range: 0.0% - 6.0%	Taxable wage base: \$12,000 New employer rate: 4.0% Experienced rate range: 0.0% - 5.4%	Taxable wage base: \$18,700 New employer rate: 2.4% Experienced rate range: 0.2% - 7.3%

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## COUNTY AND STATE ECONOMIC LANDSCAPE MISSOURI CORPORATE INCOME TAX SUMMARY

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<b>Missouri</b>	<p><b>Corporate Income Tax</b></p> <ul style="list-style-type: none"><li>• Tax rate is 6.25%</li><li>• Basis for income is federal tax return</li></ul> <p><b>Franchise Tax</b></p> <ul style="list-style-type: none"><li>• Tax is based on the "par value of the corporation's outstanding shares and surplus".</li><li>• This is defined as the "total assets or the par value of issued and outstanding capital stock, whichever is greater".</li><li>• For capital stock with no par value, the value is \$5.00 per share or actual value, whichever is higher</li><li>• The franchise tax rate is 1/30 of 1% (.000333) for tax years 2011 and prior; 1/37 of 1% (.000270) for tax year 2012; 1/50 of 1% (.000200) for tax year 2013; 1/75 of 1% (.000133) for tax year 2014; 1/150 of 1% (.000067) for tax year 2015; and 0% for tax year 2016 and thereafter.</li></ul>
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## COUNTY AND STATE ECONOMIC LANDSCAPE MISSOURI TAX INCENTIVES PROGRAMS

- Missouri Works

- o Facilitates creation of quality jobs based on specific criteria met by certain types of businesses

Program	Minimum New Jobs	Minimum New Private Capital Investment	Minimum Average Wage	Automatic Benefit
Zone Works (Note 1)	2	\$100,000	80% of County Avg. Wage	WH, 5 or 6 years (Note 3)
Rural Works (Note 2)	2	\$100,000	90% of County Avg. Wage	WH, 5 or 6 years (Note 3)
Statewide Works	10	N/A	90% of County Avg. Wage	WH, 5 or 6 years (Note 3)
Mega Works 120	100	N/A	120% of County Avg. Wage	6% of new payroll, 5 or 6 years (Note 3)
Mega Works 140	100	N/A	140%	7% of new payroll, 5 or 6 years (Note 3)

- Missouri Manufacturing Jobs Act

- o Allows qualified automotive manufacturing facilities or suppliers that bring innovative production lines to the state to retain withholding taxes
- o Must make a capital investment of at least \$75,000 per retained job at the manufacturing facility within two years of beginning to retain withholding taxes or
- o Commit to make a capital investment of at least \$50,000 per retained job at the facility for the modification or expansion of the manufacture of an existing product within two years of beginning to retain withholding taxes.
- o Businesses must submit a report documenting the retained jobs or new jobs created, the total payroll, and confirming that the business meets the health insurance requirements for new jobs.

- Business Use Incentives for Large Scale Development (BUILD)

- o An eligible industry in manufacturing, processing, assembly, research and development, agricultural processing or services in interstate commerce must invest a minimum of \$15 million; or \$10 million for an office industry (regional, national or international headquarters, telecommunications operations, computer operations, insurance companies or credit card billing and processing centers) in an economic development project; and
- o Create a minimum of 100 new jobs for eligible employees at the economic development project or a minimum of 500 jobs if the economic development project is an office industry or a minimum of 200 new jobs if the economic development project is an office industry located within a distressed community.

- Brownfield Redevelopment Program

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## **Demographics**

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## DEMOGRAPHICS POPULATION TRENDS

### Jackson County, Mo. and State of Missouri

The second key driver of regional economic performance is a region's structure, which is largely shaped by population and demographic characteristics. Below find data on a variety of factors from 1998-2014 for Jackson County and the State of Missouri in benchmarks ranging from tax rates, venture capital expenditures and advanced degrees awarded.

- **Total population** was 683,683, a growth rate of .27 percent.
- **Government employment in local services** was **1,405**, ranking the county 3<sup>rd</sup> among peers.
- **Government employment in federal services** was **1,207**, ranking the county 2<sup>nd</sup> among peers.
- **Average traded establishment size** was **18**, higher than the U.S. average of 16, ranking the county 8<sup>th</sup> among peers.
- **Young adult population** was 188,653, a negative growth rate of -0.59 percent.
- **The percentage of the population ages 0-4 (preschool)** was 6.85 percent, higher than the U.S. average of 6.23 percent.
- **The percentage of the population ages 5-17 (school age)** was 17.21 percent, higher than the U.S. average of 16.85 percent.
- **The percentage of the population ages 18-24 (college age)** was 8.77 percent, lower than the U.S. average of 9.87 percent.
- **The percentage of the population ages 25-44 (young adult)** was 27.59 percent, higher than the U.S. average of 26.37 percent.
- **The percentage of the population ages 45-64 (older adult)** was 26.05 percent, slightly lower than the U.S. average of 26.20 percent.
- **The percentage of the population ages 65 and older (older adult)** was 13.53 percent, lower than the U.S. average of 14.49 percent.
- **Population density per square mile** was 1,118, higher than the U.S. average of 88.
- **Net international migration** was .18 percent of total population, lower than the national average of .31 percent.
- **Net domestic migration** was -.14 percent of total population.
- **Agriculture output as a percentage of GDP** was .10 percent, a growth rate of .80 percent.



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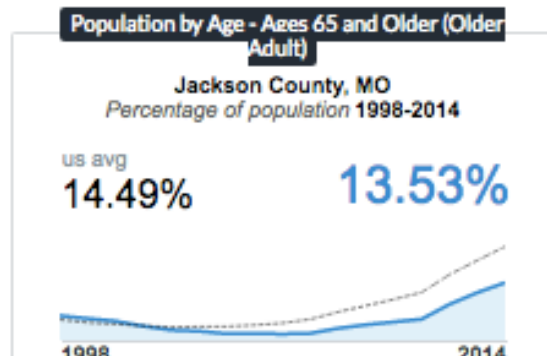
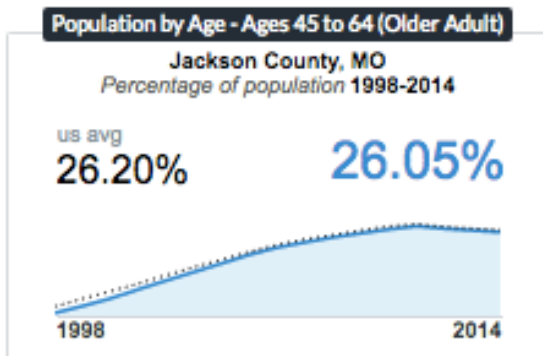
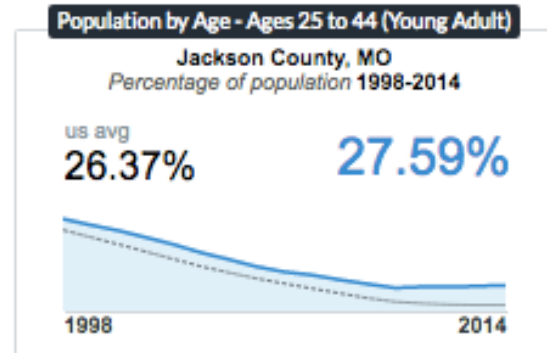
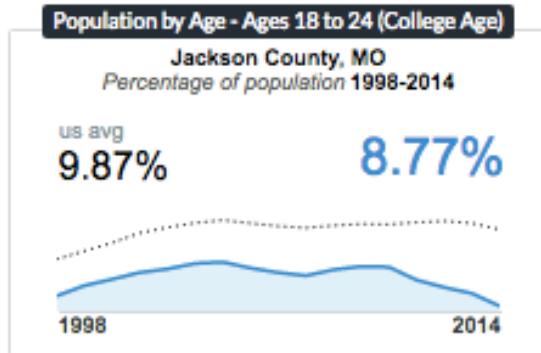
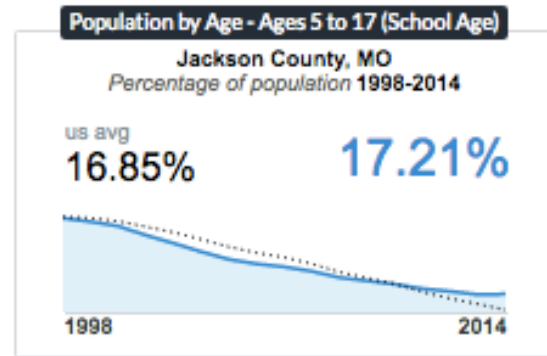
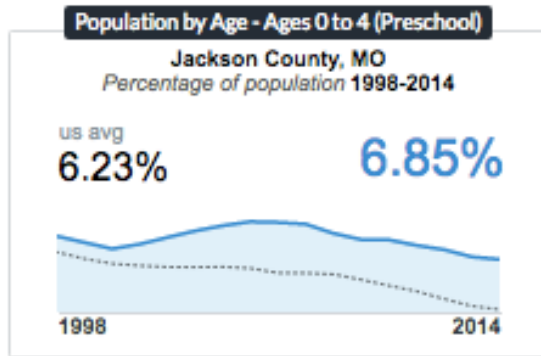
COMMUNITY MARKETING AND COMMERCIAL REAL ESTATE RESEARCH AND ANALYSIS

## DEMOGRAPHICS

### POPULATION TRENDS & GROWTH

#### Jackson County, Mo. and the State of Missouri

##### Population



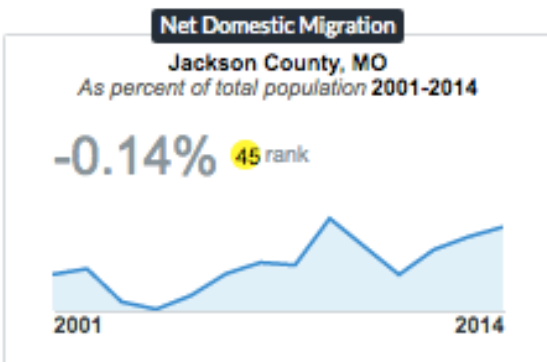
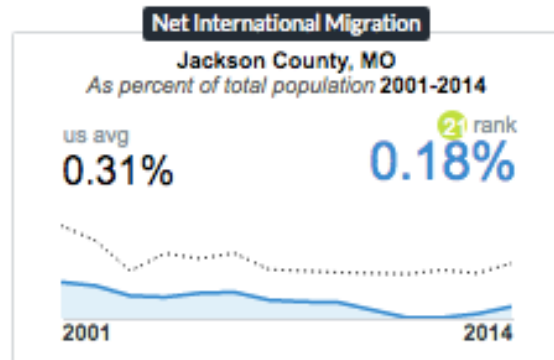
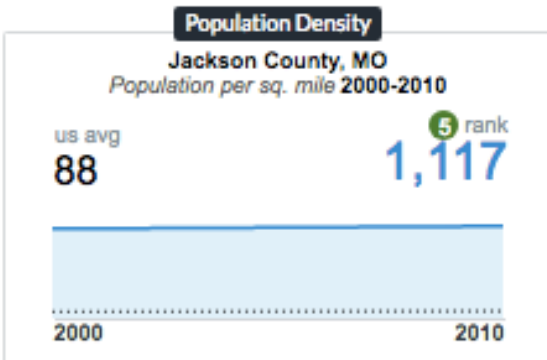
# NORTH STAR DESTINATION STRATEGIES

COMMUNITY MARKETING AND COMMERCIAL REAL ESTATE RESEARCH AND ANALYSIS

## DEMOGRAPHICS

### POPULATION DENSITY, MIGRATION, GDP

#### Jackson County, Mo. and the State of Missouri...



# NORTH STAR DESTINATION STRATEGIES

COMMUNITY MARKETING AND COMMERCIAL REAL ESTATE RESEARCH AND ANALYSIS

## DEMOGRAPHICS

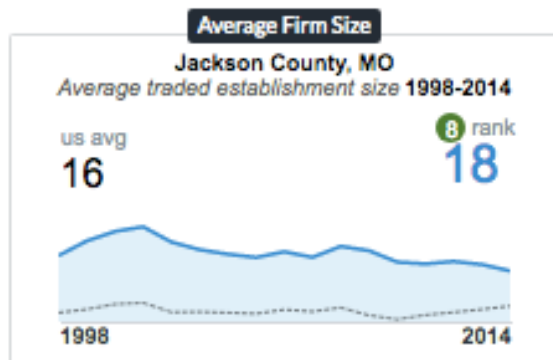
### GOVERNMENT EMPLOYMENT & HEADQUARTERS

#### Jackson County, Mo. and the State of Missouri

- Jackson County had 1,405 local government employees in 2013, ranking 3<sup>rd</sup>.
- Jackson County had 1,207 federal employees in 2013, ranking 2<sup>nd</sup>.
- Missouri government employment in higher education was 43,862.
- Missouri government employment in health and hospitals was 14,616.
- Jackson County's average firm size was 18, ranking 8<sup>th</sup>.
- Missouri is the headquarters home for 29 Fortune 1000 firms, ranking 24<sup>th</sup>.



#### Firm Demographics



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# **NORTH STAR DESTINATION STRATEGIES**

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**COMMUNITY MARKETING AND COMMERCIAL REAL ESTATE RESEARCH AND ANALYSIS**

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## **Industry Clusters**

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# NORTH STAR DESTINATION STRATEGIES

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COMMUNITY MARKETING AND COMMERCIAL REAL ESTATE RESEARCH AND ANALYSIS

## CLUSTER ANALYSIS JACKSON COUNTY EMPLOYMENT *(FIVE-YEAR TREND 2009-2014)*

Jackson County job growth was most significant in the transportation, manufacturing and service industries, with freight transportation arrangement jobs leading the way:

- **Freight transportation arrangement jobs rose 371% from 247 to 1,164 employees.**
- **Railroad rolling stock manufacturing jobs rose 31% from 135 to 177 employees.**
- **Auto equipment rental and leasing jobs rose 28.9% from 329 to 424 employees.**
- **Specialty food stores jobs rose 22.6% from 434 to 532 employees.**
- **Gas station jobs rose 26.5% from 1,663 to 2,104 employees.**
- **Utility system construction jobs rose 27.3% from 487 to 620 employees.**
- **Cut and sew apparel manufacturing jobs rose 33.3% from 18 to 24 employees.**
- **Soap, cleaning compound, toilet manufacturing jobs rose 20.6% from 180 employees to 217 employees.**

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# **NORTH STAR DESTINATION STRATEGIES**

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COMMUNITY MARKETING AND COMMERCIAL REAL ESTATE RESEARCH AND ANALYSIS

## **CLUSTER ANALYSIS JACKSON COUNTY WAGE GROWTH (FIVE-YEAR TREND 2009-2014)**

Wage growth in Jackson County from 2009-2014 was most significant in the following sectors: Software publishing, sound recording, messenger and delivery services, freight transportation, railroad support manufacturing and residential construction.

•**Software publishers: Average Annual Wage (AAW) rose 72% from \$63,362 to \$109,070.**

•**Sound recording industry: AAW rose 43% from \$48,421 to \$69,391.**

•**Local messengers and local delivery: AAW rose 42.3% from \$26,470 to \$37,657.**

•**Support activities for freight transportation: AAW rose 42.1% from \$25,983 to \$36,926.**

•**Freight transportation arrangement: AAW rose 33.6% from \$48,795 to \$65,211.**

•**Railroad rolling stock manufacturing: AAW rose 23.5% from \$57,987 to \$71,642.**

•**Residential building construction: AAW rose 23.2% from \$36,037 to \$44,412.**

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# **NORTH STAR DESTINATION STRATEGIES**

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COMMUNITY MARKETING AND COMMERCIAL REAL ESTATE RESEARCH AND ANALYSIS

## **CLUSTER ANALYSIS**

### **JACKSON COUNTY NUMBER OF ESTABLISHMENTS**

*(FIVE-YEAR TREND 2009-2014)*

- **Support activities for road transportation establishments rose 36% from 22 to 30.**
- **Facilities support services establishments rose 120% from 5 establishments to 11.**
- **Boiler, tank, shipping container manufacturing establishments rose 20% from 5 establishments to 6.**
- **Psychological and substance abuse hospital establishments rose 50% from 4 establishments to 6.**
- **Ground passenger transportation establishments rose 50% from 10 establishments to 15.**
- **Cut and sew apparel manufacturing establishments rose 33% from 3 establishments to 4.**

# NORTH STAR DESTINATION STRATEGIES

COMMUNITY MARKETING AND COMMERCIAL REAL ESTATE RESEARCH AND ANALYSIS

## CLUSTER ANALYSIS JACKSON COUNTY DATA POINTS (FIVE-YEAR TREND 2009-2014)

Industry Industry Title	2009			2010			2011			2012			2013			2014									
	EST09	EMP09	AAW09	Est10	EMP10	AAW10	Est11	EMP11	AAW11	Est12	EMP12	AAW12	Est13	EMP13	AAW13	Est14	EMP14	AAW14	1 YR Δ	1 YR Δ	1 YR Δ	5 YR Δ	5 YR Δ	5 YR Δ	
5112 Software publishers	22	152	63362	15	89	309547	16	166	109070										6.7%	86.5%	5.1%	-27.1%	9.2%	72.1%	
4922 Local messengers and local delivery	14	169	26470	9	64	32074	12	113	37617										11.1%	76.6%	17.4%	-14.1%	-33.1%	42.1%	
4805 Freight transportation arrangement	41	247	48795	32	209	52104	35	1304	55211										12.5%	64.2%	4.9%	-12.2%	171.3%	13.6%	
1114 Greenhouse and nursery production	6	0	0	5	76	22817	6	122	26985										20.0%	60.5%	18.3%	0.0%			
4241 Apparel and piece goods merchant wholesalers	15	58	55088	12	30	35219	12	47	32647										0.0%	56.7%	-7.2%	-20.0%	-19.0%	-40.7%	
5615 Travel arrangement and reservation services	17	0	0	30	75	19993	26	103	44116										-13.1%	17.1%	10.1%	-29.7%			
4812 Specialty food stores	64	434	29753	41	430	24236	42	532	30992										2.4%	24.2%	14.1%	-4.5%	22.6%	1.0%	
1121 Cattle ranching and farming	6	0	0	5	17	162064	5	21	156662										0.0%	23.5%	-14.0%	-16.7%			
2372 Land subdivision	21	64	42082	10	27	32427	9	33	45466										-10.0%	22.2%	40.2%	-57.1%	-48.4%	8.0%	
4884 Support activities for road transportation	22	224	25983	26	160	39052	30	195	38926										15.4%	21.9%	-5.4%	36.4%	-12.9%	42.1%	
5321 Automotive equipment rental and leasing	39	329	30956	44	348	32042	43	424	30642										-2.3%	21.8%	-4.4%	10.1%	28.9%	-1.0%	
5612 Facilities support services	5	0	0	9	133	30423	11	182	35387										22.2%	21.8%	16.3%	120.0%			
3328 Coating, engraving, and heat treating metals	30	178	15279	28	172	15785	27	449	40423										-3.6%	20.7%	13.0%	-10.0%	18.0%	21.5%	
4471 Gasoline stations	200	1663	22184	214	1781	21665	223	2104	21894										3.7%	18.1%	-7.5%	11.0%	26.5%	-1.2%	
2371 Utility system construction	44	487	47794	36	326	58895	41	420	55200										13.9%	17.0%	-6.3%	-6.8%	27.3%	15.3%	
5614 Business support services	127	1548	34684	116	1443	37484	118	1694	36335										1.7%	17.4%	-3.1%	-7.1%	9.4%	4.8%	
2361 Residential building construction	329	892	36037	254	828	42023	269	960	44412										5.9%	15.9%	5.7%	-14.2%	7.6%	21.2%	
3256 Soap, cleaning compound, and toiletry mfg.	13	180	37647	10	191	34917	9	217	30033										-10.0%	13.6%	-14.0%	-30.4%	20.6%	-20.2%	
3324 Boiler, tank, and shipping container mfg.	5	210	64358	5	143	54942	6	162	51143										20.0%	13.3%	-6.9%	20.0%	-22.9%	-20.5%	
4541 Electronic shopping and mail-order houses	41	322	39932	46	310	41098	41	351	41371										-10.9%	13.2%	0.0%	0.0%	9.0%	3.6%	
2373 Highway, street, and bridge construction	18	364	58817	13	854	72737	12	965	72387										15.4%	13.0%	-0.5%	-16.7%	0.1%	5.5%	
2389 Other specialty trade contractors	156	1313	47381	130	1043	43487	133	1389	47229										2.3%	12.1%	8.4%	-14.7%	-11.0%	-0.3%	
2383 Building finishing contractors	340	2069	43237	254	1618	41953	250	1808	43564										-1.6%	11.7%	3.8%	-26.5%	-12.6%	0.8%	
3371 Household and institutional furniture mfg.	35	379	34689	27	364	37153	26	629	39003										-3.7%	11.9%	5.0%	-25.7%	8.6%	12.3%	
5122 Sound recording industries	6	12	48421	4	9	64255	4	10	69391										0.0%	11.1%	8.0%	-31.3%	-16.7%	41.3%	
8129 Other personal services	75	879	18213	75	929	19114	82	1032	18699										9.3%	11.1%	-2.2%	9.1%	17.4%	2.7%	
6222 Psychiatric and substance abuse hospitals	4	0	0	5	829	41401	6	918	41584											20.0%	10.7%	0.4%	50.0%		
5418 Advertising, pr, and related services	171	1898	64612	157	1646	66833	157	1820	73875										0.0%	10.6%	10.5%	-8.2%	-4.1%	14.3%	
8114 Household goods repair and maintenance	43	142	29466	39	91	26225	42	100	26184										7.7%	9.9%	-0.2%	-2.3%	-29.6%	-11.1%	
3315 Foundries	7	0	0	7	136	45380	8	149	53261											14.3%	9.0%	17.4%	14.3%		
5622 Waste treatment and disposal	6	71	43547	5	43	51700	5	47	52088										0.0%	9.3%	0.8%	-16.7%	-33.8%	19.6%	
7121 Museums, historical sites, zoos, and parks	8	749	31512	10	796	29467	9	869	29302										-10.0%	9.2%	-0.6%	12.5%	16.0%	-7.0%	
5417 Scientific research and development services	23	1372	66225	27	1385	74654	25	1512	75113										-7.4%	9.2%	0.6%	8.7%	10.2%	13.4%	
3152 Cut and sew apparel manufacturing	3	18	17384	6	22	20283	4	24	20450										-31.3%	9.1%	0.6%	31.3%	31.3%	17.6%	
4899 Other ground passenger transportation	10	417	24361	16	474	23524	15	516	27341										-6.3%	8.9%	4.7%	50.0%	23.7%	11.4%	
8141 Private households	906	946	14046	232	305	21632	262	332	22272										12.9%	8.9%	3.0%	-71.1%	-64.9%	58.6%	
3365 Railroad rolling stock manufacturing	3	135	57947	4	163	79608	4	177	71642										0.0%	8.6%	-9.3%	33.3%	31.1%	23.5%	



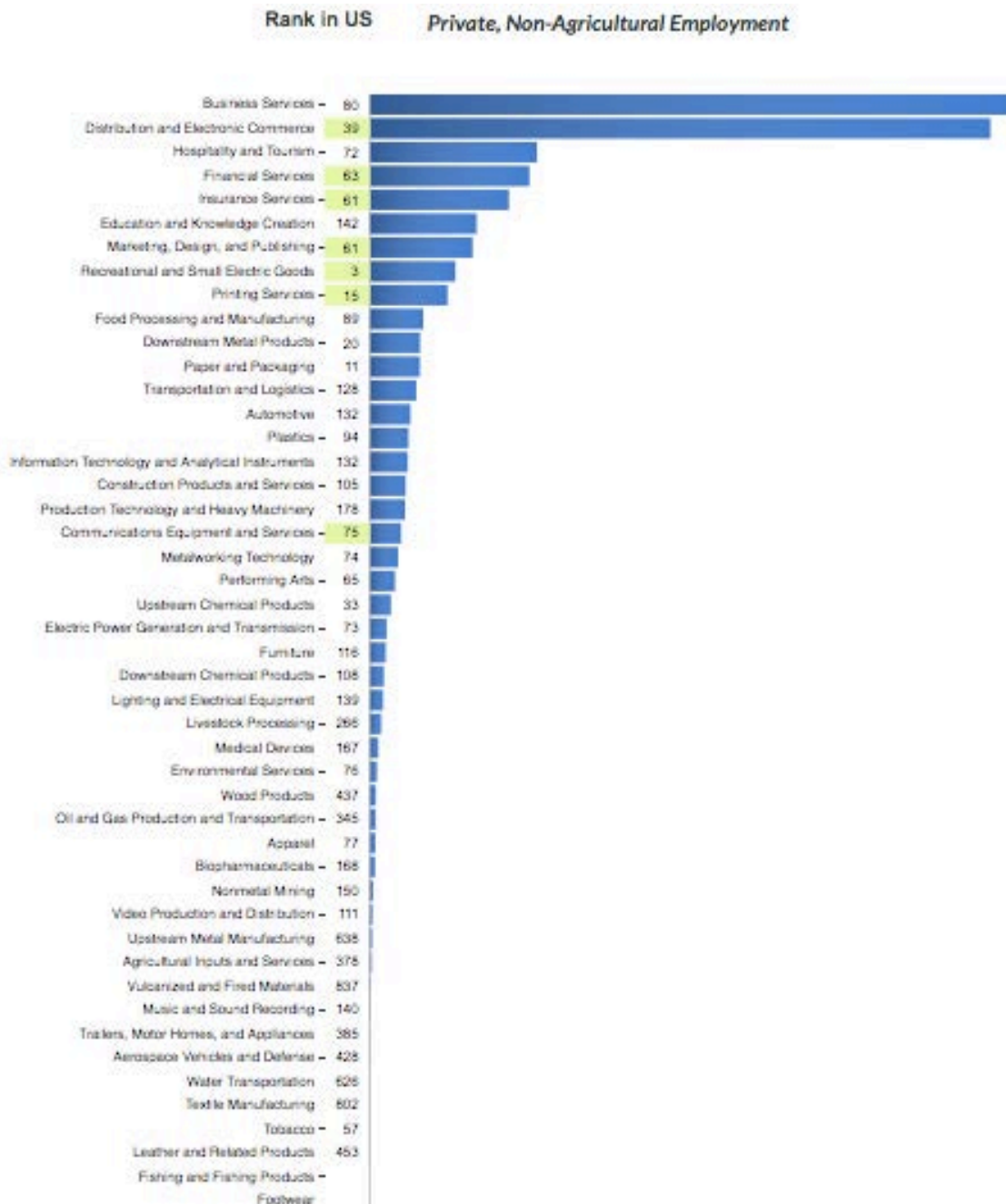
# NORTH STAR DESTINATION STRATEGIES

COMMUNITY MARKETING AND COMMERCIAL REAL ESTATE RESEARCH AND ANALYSIS

## CLUSTER PORTFOLIO

### Jackson County 2014 Employment by Traded Cluster

The charts below rank the leading clusters in the Jackson County region based on a set of core performance indicators. Traded clusters serve markets in other regions or nations, and are concentrated in regions that afford specific competitive advantages. Local clusters sell products and services primarily for the local market and are located in every region. (Rank numbers are out of 3,221 U.S. counties.)



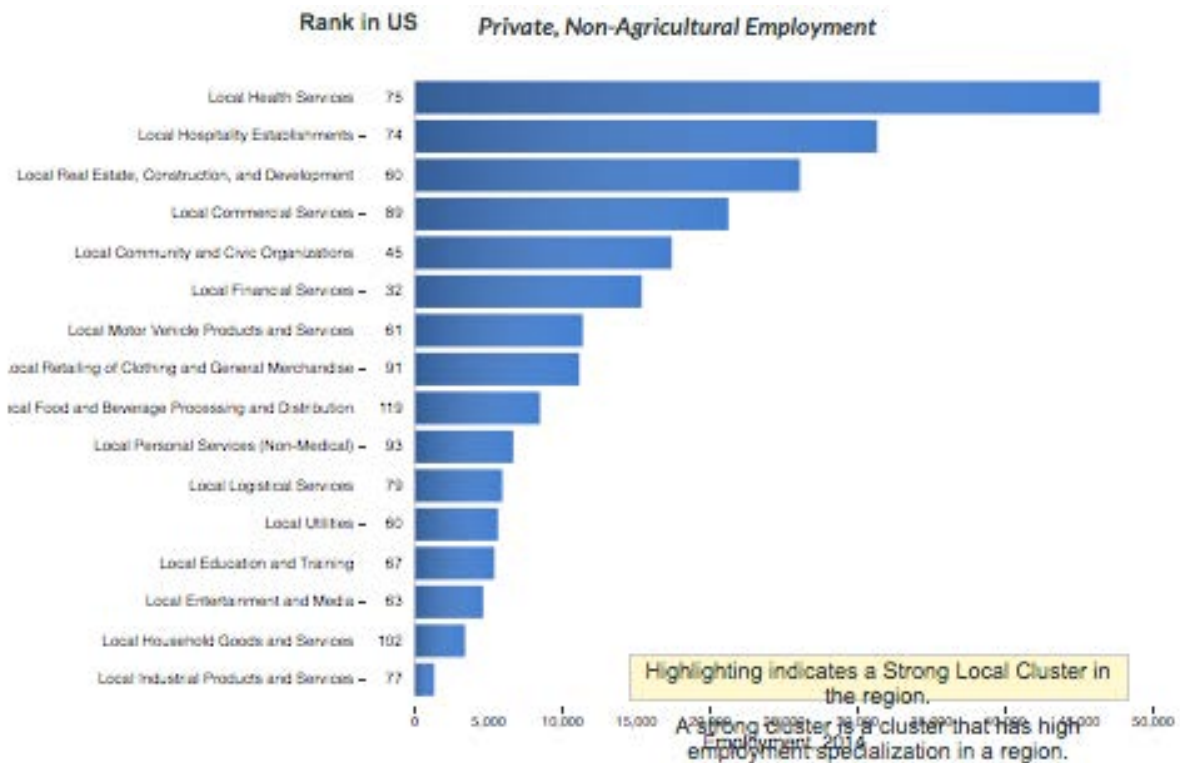
# NORTH STAR DESTINATION STRATEGIES

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# NORTH STAR DESTINATION STRATEGIES

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COMMUNITY MARKETING AND COMMERCIAL REAL ESTATE RESEARCH AND ANALYSIS

## CLUSTER PORTFOLIO

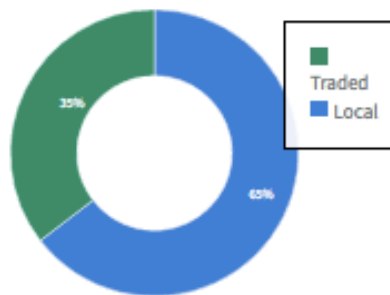
### Jackson County Traded vs. Local Clusters

Traded clusters serve markets in other regions or nations, and are concentrated in regions that afford specific competitive advantages. Local clusters sell products and services primarily for the local market and are located in every region.

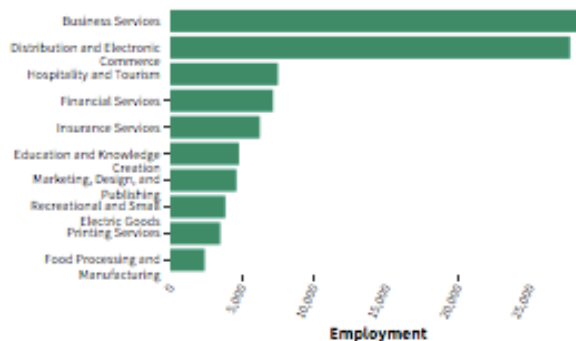
#### Cluster Portfolio



#### Traded vs. Local Clusters



#### Top Clusters by Employment



# NORTH STAR DESTINATION STRATEGIES

COMMUNITY MARKETING AND COMMERCIAL REAL ESTATE RESEARCH AND ANALYSIS

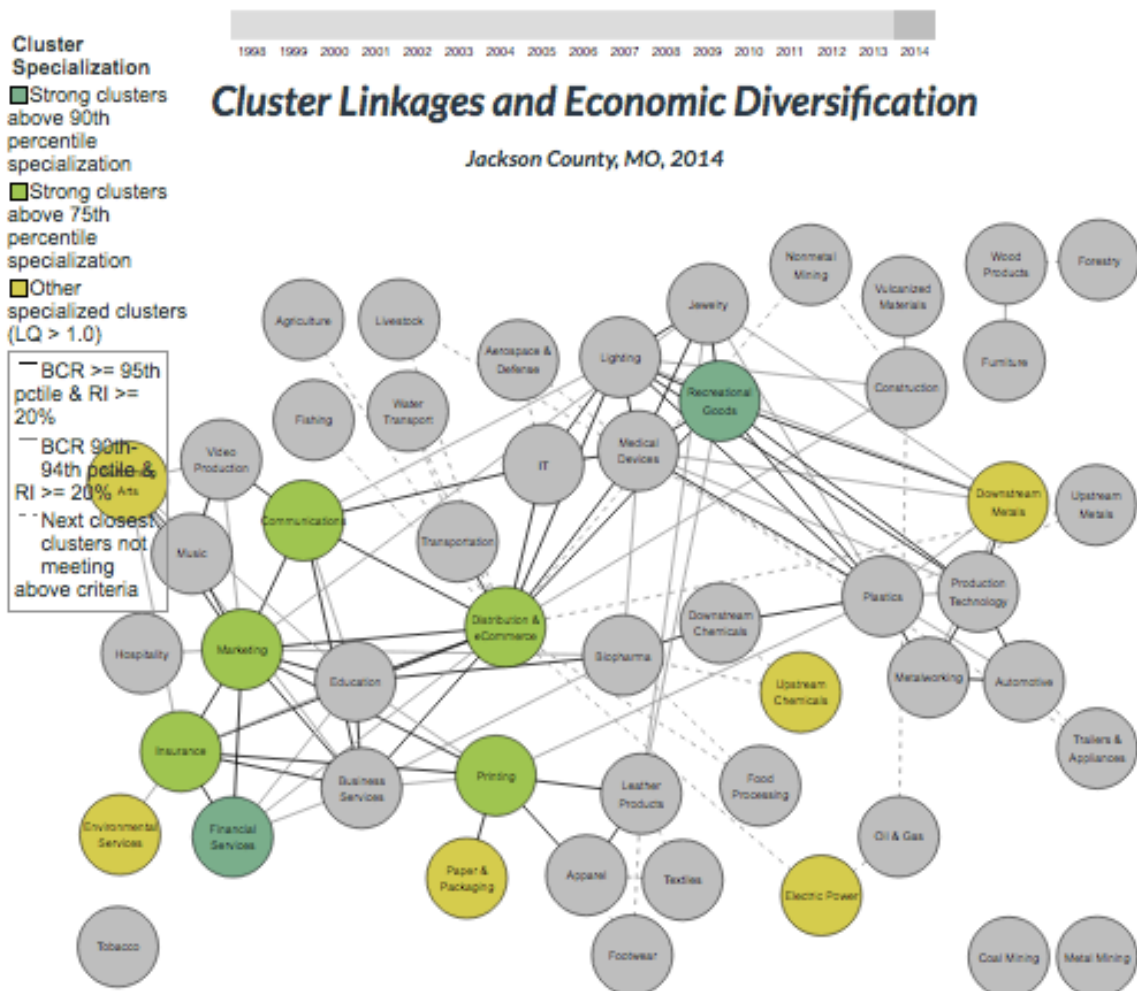
## CLUSTER PORTFOLIO

### Jackson County Cluster Linkages/Economic Diversification

#### Related Clusters

The data visualization below displays the related clusters with information about the specialization for this region.

More information on Related Clusters available [here](#).



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# **NORTH STAR DESTINATION STRATEGIES**

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**COMMUNITY MARKETING AND COMMERCIAL REAL ESTATE RESEARCH AND ANALYSIS**

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## **Lee's Summit Tapestry**

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# NORTH STAR DESTINATION STRATEGIES

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COMMUNITY MARKETING AND COMMERCIAL REAL ESTATE RESEARCH AND ANALYSIS

## LEE'S SUMMIT TAPESTRY LIFEMODE GROUPS: FAMILY LANDSCAPES, AFFLUENT ESTATES, MIDDLE GROUND & GENXURBAN

According to market research into Lee's Summit families and residents, four general LIFEMODE groups emerged, with the strongest representation in the Family Landscapes and Affluent Estates LIFEMODE groups, followed by Middle Ground and GenXUrban LIFEMODE groups. Descriptions of each group are below.

### **LifeMode 4 Family Landscapes**

- Successful young families in their first homes
- Non-diverse, prosperous married-couple families, residing in suburban or semirural areas with a low vacancy rate (second lowest)
- Homeowners (80%) with mortgages (second highest %), living in newer single-family homes, with median home value slightly higher than the U.S.
- Two workers in the family, contributing to the second highest labor force participation rate, as well as low unemployment
- Do-it-yourselfers, who work on home improvement projects, as well as their lawns and gardens
- Sports enthusiasts, typically owning newer sedans or SUVs, dogs, and savings accounts/plans, comfortable with the latest technology
- Eat out frequently at fast food or family restaurants to accommodate their busy lifestyle
- Especially enjoy bowling, swimming, playing golf, playing video games, watching movies rented via Redbox, and taking trips to a zoo or theme park

### **LifeMode 1 Affluent Estates**

- Established wealth—educated, well-traveled married couples
- Accustomed to "more": less than 10% of all households, with 20% of household income
- Homeowners (almost 90%), with mortgages (70%)
- Married couple families with children ranging from grade school to college
- Expect quality; invest in time-saving services
- Participate actively in their communities
- Active in sports and enthusiastic travelers

### **LifeMode 8 Middle Ground**

- Lifestyles of thirtysomethings
- Millennials in the middle: single/married, renters/homeowners, middle class/working class
- Urban market mix of single-family, townhome, and multi-unit dwellings
- Majority of residents attended college or attained a college degree
- Householders have ditched their landlines for cell phones, which they use to listen to music (generally contemporary hits), read the news, and get the latest sports updates of their favorite teams
- Online all the time: use the Internet for entertainment (downloading music, watching YouTube, finding dates), social media (Facebook, Twitter, LinkedIn), shopping and news
- Leisure includes night life (clubbing, movies), going to the beach, some travel and hiking

### **LifeMode 5 GenXurban**

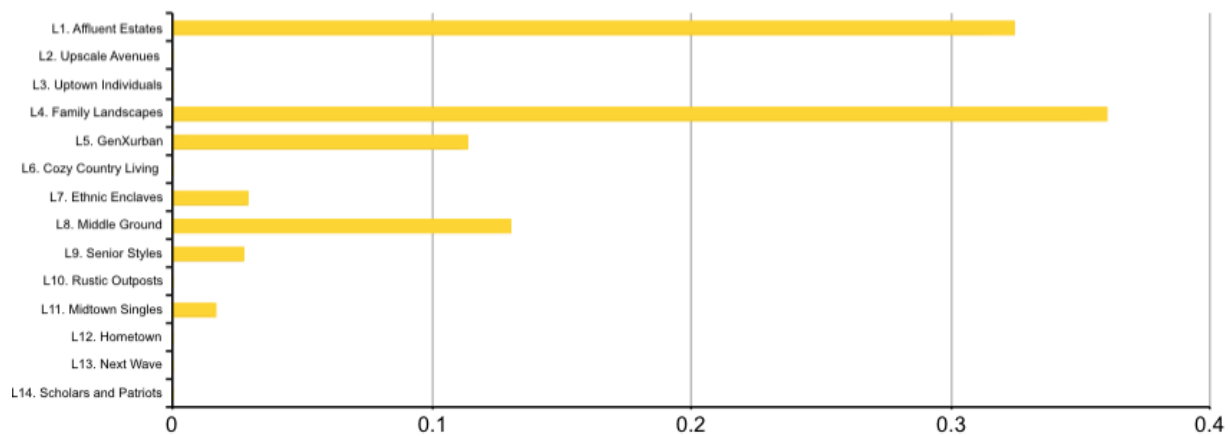
- Gen X in middle age; families with fewer kids and a mortgage
- Second largest Tapestry group, comprised of Gen X married couples, and a growing population of retirees
- About a fifth of residents are 65 or older; about a fourth of households have retirement income
- Own older single-family homes in urban areas, with 1 or 2 vehicles
- Live and work in the same county, creating shorter commute times
- Invest wisely, well-insured, comfortable banking online or in person
- News junkies (read a daily newspaper, watch news on TV, and go online for news)
- Enjoy reading, photo album/scrapbooking, playing board games and cards, doing crossword puzzles, going to museums and rock concerts, dining out, and walking for exercise

# NORTH STAR DESTINATION STRATEGIES

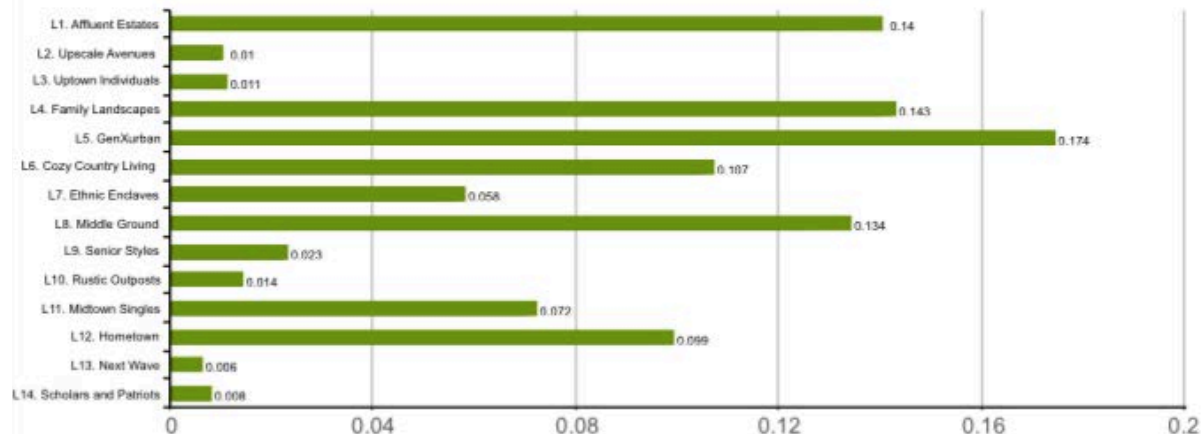
COMMUNITY MARKETING AND COMMERCIAL REAL ESTATE RESEARCH AND ANALYSIS

## LEE'S SUMMIT TAPESTRY LIFEMODE GROUPS: FAMILY LANDSCAPES, AFFLUENT ESTATES, MIDDLE GROUND & GENXURBAN

LifeMode Groups | Lee's Summit Residents



LifeMode Groups | Kansas City MSA Residents



# NORTH STAR DESTINATION STRATEGIES

COMMUNITY MARKETING AND COMMERCIAL REAL ESTATE RESEARCH AND ANALYSIS

## LEE'S SUMMIT TAPESTRY TAPESTRY SEGMENTATION #1: SOCCER MOMS

The rise of the dual income, community-minded family is a demographic trend that's taken hold in Lee's Summit over the past five years. That insight is among several key demographic trends identified by North Star Destination Strategies and presented to EDC and City leaders in 2015.

The information will inform the City's economic development efforts by offering valuable insight into key demographic trends, North Star's research will now enable the EDC and City to target specific industries for expansion and new business attraction. A description of the Soccer Moms Tapestry Segmentation is below.

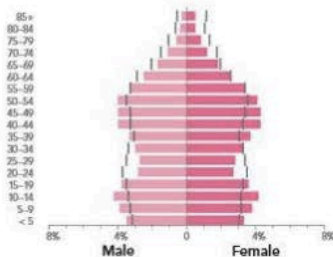
LifeMode Group: Family Landscapes

**4A Soccer Moms**

TAPESTRY SEGMENTATION  
esri.com/tapestry

### AGE BY SEX (Esri data)

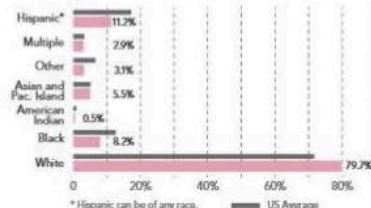
Median Age: **36.6** US: 37.6  
1 Indicates US



### RACE AND ETHNICITY (Esri data)

The Diversity Index summarizes racial and ethnic diversity. The index shows the likelihood that two persons, chosen at random from the same area, belong to different race or ethnic groups. The index ranges from 0 (no diversity) to 100 (complete diversity).

Diversity Index: **48.3** US: 62.1



### INCOME AND NET WORTH

Net worth measures total household assets (homes, vehicles, investments, etc.) less any debts, secured (e.g., mortgages) or unsecured (credit cards). Household income and net worth are estimated by Esri.



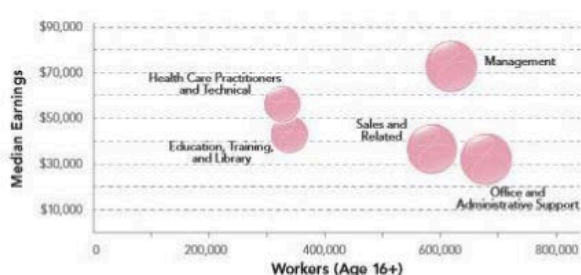
### AVERAGE HOUSEHOLD BUDGET INDEX

The index compares the average amount spent in this market's household budgets for housing, food, apparel, etc., to the average amount spent by all US households. An index of 100 is average. An index of 120 shows that average spending by consumers in this market is 20 percent above the national average. Consumer expenditures are estimated by Esri.



### OCCUPATION BY EARNINGS

The five occupations with the highest number of workers in the market are displayed by median earnings. Data from the Census Bureau's American Community Survey.





# NORTH STAR DESTINATION STRATEGIES

COMMUNITY MARKETING AND COMMERCIAL REAL ESTATE RESEARCH AND ANALYSIS

## LEE'S SUMMIT TAPESTRY

### TAPESTRY SEGMENTATION #1: SOCCER MOMS



LifeMode Group: Family Landscapes

## Soccer Moms

4A

Households: 3,327,000

Average Household Size: 2.96

Median Age: 36.6

Median Household Income: \$84,000

#### WHO ARE WE?

Soccer Moms is an affluent, family-oriented market with a country flavor. Residents are partial to new housing away from the bustle of the city but close enough to commute to professional job centers. Life in this suburban wilderness offsets the hectic pace of two working parents with growing children. They favor time-saving devices, like banking online or housekeeping services, and family-oriented pursuits.

#### OUR NEIGHBORHOOD

- Soccer Moms residents prefer the suburban periphery of metropolitan areas.
- Predominantly single family, homes are in newer neighborhoods, 36% built in the 1990s (Index 253), 31% built since 2000.
- Owner-occupied homes have high rate of mortgages at 74% (Index 163), and low rate vacancy at 5%.
- Median home value is \$226,000.
- Most households are married couples with children; average household size is 2.96.
- Most households have 2 or 3 vehicles; long travel time to work including a disproportionate number commuting from a different county (Index 133).

#### SOCIOECONOMIC TRAITS

- Education: 37.7% college graduates; more than 70% with some college education.
- Low unemployment at 5.9%; high labor force participation rate at 72%; 2 out of 3 households include 2+ workers (Index 124).
- Connected, with a host of wireless devices from iPods to tablets—anything that enables convenience, like banking, paying bills, or even shopping online.
- Well insured and invested in a range of funds, from savings accounts or bonds to stocks.
- Carry a higher level of debt, including first (Index 159) and second mortgages (Index 154) and auto loans (Index 151).



Note: The index represents the ratio of the segment rate to the US rate multiplied by 100. Consumer preferences are indicated from data by CEMIS.

4A

LifeMode Group: Family Landscapes

## Soccer Moms



# NORTH STAR DESTINATION STRATEGIES

COMMUNITY MARKETING AND COMMERCIAL REAL ESTATE RESEARCH AND ANALYSIS

## LEE'S SUMMIT TAPESTRY

### TAPESTRY SEGMENTATION #1: SOCCER MOMS

LifeMode Group: Family Landscapes

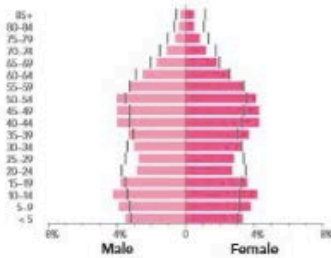
**4A Soccer Moms**



#### AGE BY SEX Esri data

Median Age: **36.6** US: 37.6

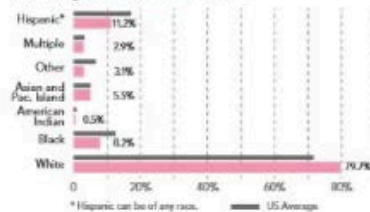
1 Indicates US



#### RACE AND ETHNICITY Esri data

The Diversity Index summarizes racial and ethnic diversity. The index shows the likelihood that two persons, chosen at random from the same area, belong to different race or ethnic groups. The index ranges from 0 (no diversity) to 100 (complete diversity).

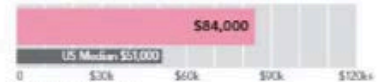
Diversity Index: **48.3** US: 62.1



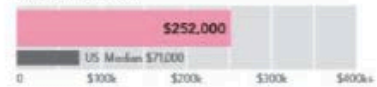
#### INCOME AND NET WORTH

Net worth measures total household assets (homes, vehicles, investments, etc.) less any debts, secured (e.g., mortgages) or unsecured (credit cards). Household income and net worth are estimated by Esri.

##### Median Household Income



##### Median Net Worth



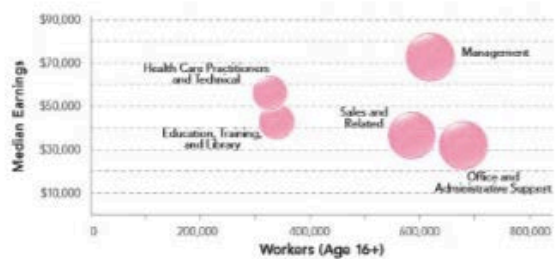
#### AVERAGE HOUSEHOLD BUDGET INDEX

The index compares the average amount spent in this market's household budgets for housing, food, apparel, etc., to the average amount spent by all US households. An index of 100 is average. An index of 120 shows that average spending by consumers in this market is 20 percent above the national average. Consumer expenditures are estimated by Esri.



#### OCCUPATION BY EARNINGS

The five occupations with the highest number of workers in the market are displayed by median earnings. Data from the Census Bureau's American Community Survey.



# NORTH STAR DESTINATION STRATEGIES

COMMUNITY MARKETING AND COMMERCIAL REAL ESTATE RESEARCH AND ANALYSIS

## LEE'S SUMMIT TAPESTRY

### TAPESTRY SEGMENTATION #1: SOCCER MOMS

4A

LifeMode Group: Family Landscapes

## Soccer Moms



TAPESTRY  
SEGMENTATION  
esri.com/tapestry

#### MARKET PROFILE

(Consumer preferences are estimated from data by CIRMI®)

- Most households own at least 2 vehicles; the most popular types are minivans and SUVs.
- Family-oriented purchases and activities dominate, like 4+ televisions (Index 165), movie purchases or rentals, children's apparel and toys, and visits to theme parks or zoos.
- Outdoor activities and sports are characteristic of life in the suburban periphery, like bicycling, jogging, golfing, boating, and target shooting.
- Home maintenance services are frequently contracted, but these families also like their gardens and own the tools for minor upkeep, like riding mowers and tillers.

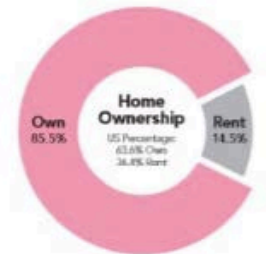
#### HOUSING

Median home value is displayed for markets that are primarily owner occupied; average rent is shown for renter-occupied markets. Tenure and home value are estimated by Esri. Housing type and average rent are from the Census Bureau's American Community Survey.



Typical Housing:  
Single Family

Median Value:  
\$226,000  
US Median: \$177,000



#### POPULATION CHARACTERISTICS

Total population, average annual population change since Census 2010, and average density (population per square mile) are displayed for the market relative to the size and change among all Tapestry markets. Data estimated by Esri.



#### ESRI INDEXES

Esri developed three indexes to display average household wealth, socioeconomic status, and housing affordability for the market relative to US standards.

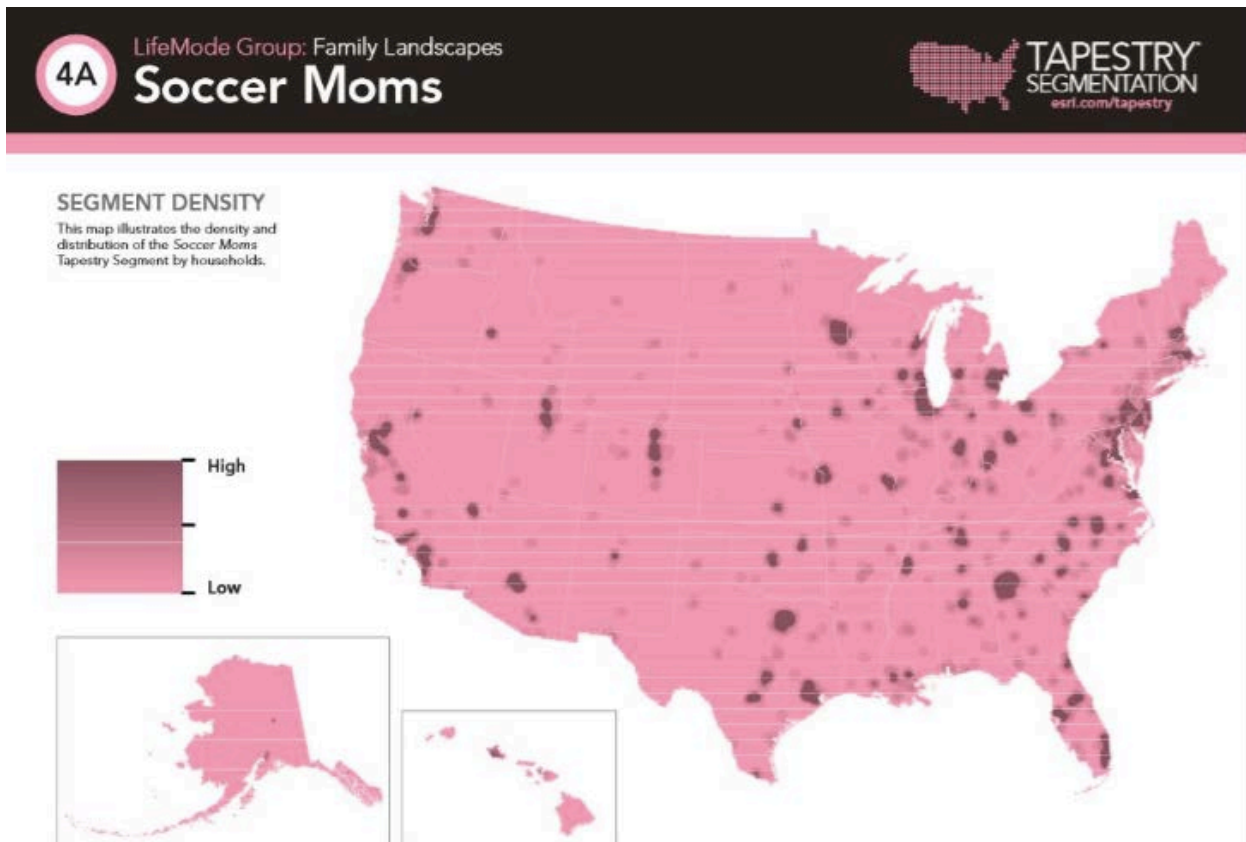


# NORTH STAR DESTINATION STRATEGIES

COMMUNITY MARKETING AND COMMERCIAL REAL ESTATE RESEARCH AND ANALYSIS

## LEE'S SUMMIT TAPESTRY

### TAPESTRY SEGMENTATION #1: SOCCER MOMS



# NORTH STAR DESTINATION STRATEGIES

COMMUNITY MARKETING AND COMMERCIAL REAL ESTATE RESEARCH AND ANALYSIS

## LEE'S SUMMIT TAPESTRY TAPESTRY SEGMENTATION #2: PROFESSIONAL PRIDE

In recent years, the Lee's Summit community has grown in the number of households characterized by Professional Pride. These consumers are well-educated professionals that have prospered throughout the Great Recession. Details about the Professional Pride Tapestry Segmentation are below.



LifeMode Group: Affluent Estates

### Professional Pride

1B

Households: 1,878,000

Average Household Size: 3.11

Median Age: 40.5

Median Household Income: \$127,000

#### WHO ARE WE?

*Professional Pride* consumers are well-educated career professionals that have prospered through the Great Recession. To maintain their upscale suburban lifestyles, these goal oriented couples work, often commuting far and working long hours. However, their schedules are fine-tuned to meet the needs of their school age children. They are financially savvy; they invest wisely and benefit from interest and dividend income. So far, these established families have accumulated an average of 1.5 million dollars in net worth, and their annual household income runs at more than twice the US level. They take pride in their newer homes and spend valuable time and energy upgrading. Their homes are furnished with the latest in home trends, including finished basements equipped with home gyms and in-home theaters.

#### OUR NEIGHBORHOOD

- Typically owner occupied (Index 173), single-family homes are in newer neighborhoods: 59% of units were built in the last 20 years.
- Neighborhoods are primarily located in the suburban periphery of large metropolitan areas.
- Most households own two or three vehicles; long commutes are the norm.
- Homes are valued at more than twice the US median home value, although three out of four homeowners have mortgages to pay off.
- Families are mostly married couples (almost 80% of households), and more than half of these families have kids. Their average household size, 3.11, reflects the presence of children.

#### SOCIOECONOMIC TRAITS

- *Professional Pride* consumers are highly qualified in the science, technology, law, or finance fields; they've worked hard to build their professional reputation or their start-up businesses.
- These consumers are willing to risk their accumulated wealth in the stock market.
- They have a preferred financial institution, regularly read financial news, and use the Internet for banking transactions.
- These residents are goal oriented and strive for lifelong earning and learning.
- Life here is well organized; routine is a key ingredient to daily life.



Note: The index represents the rate of the segment rate to the US rate multiplied by 100. Customer preferences are estimated from data by CTR M&E.



# NORTH STAR DESTINATION STRATEGIES

COMMUNITY MARKETING AND COMMERCIAL REAL ESTATE RESEARCH AND ANALYSIS

## LEE'S SUMMIT TAPESTRY

### TAPESTRY SEGMENTATION #2: PROFESSIONAL PRIDE

1B

LifeMode Group: Affluent Estates

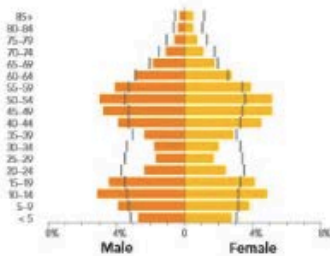
## Professional Pride



**TAPESTRY SEGMENTATION**  
esri.com/tapestry

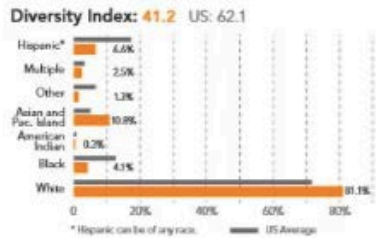
#### AGE BY SEX Est./data

Median Age: **40.5** US: 37.6  
1 Indicates US



#### RACE AND ETHNICITY Est./data

The Diversity Index summarizes racial and ethnic diversity. The index shows the likelihood that two persons, chosen at random from the same area, belong to different race or ethnic groups. The index ranges from 0 (no diversity) to 100 (complete diversity).



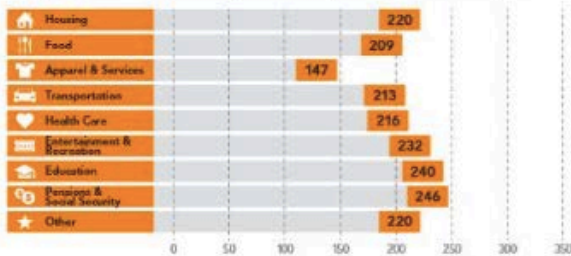
#### INCOME AND NET WORTH

Net worth measures total household assets (homes, vehicles, investments, etc.) less any debts, secured (e.g., mortgages) or unsecured (credit cards). Household income and net worth are estimated by Esri.



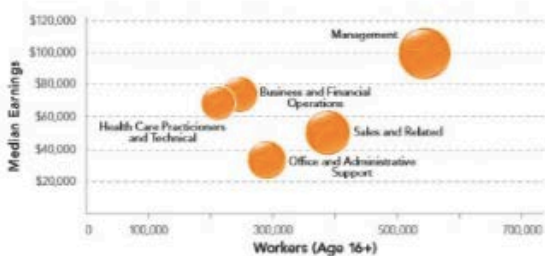
#### AVERAGE HOUSEHOLD BUDGET INDEX

The index compares the average amount spent in this market's household budgets for housing, food, apparel, etc., to the average amount spent by all US households. An index of 100 is average. An index of 120 shows that average spending by consumers in this market is 20 percent above the national average. Consumer expenditures are estimated by Esri.



#### OCCUPATION BY EARNINGS

The five occupations with the highest number of workers in the market are displayed by median earnings. Data from the Census Bureau's American Community Survey.



# NORTH STAR DESTINATION STRATEGIES

COMMUNITY MARKETING AND COMMERCIAL REAL ESTATE RESEARCH AND ANALYSIS

## LEE'S SUMMIT TAPESTRY

### TAPESTRY SEGMENTATION #2: PROFESSIONAL PRIDE

#### 1B LifeMode Group: Affluent Estates Professional Pride

TAPESTRY  
SEGMENTATION  
esri.com/tapestry

#### MARKET PROFILE (Consumer preferences are estimated from data by GfK Mill)

- These frequent travelers take several domestic trips a year, preferring to book their plane tickets, accommodations, and rental cars via the Internet.
- Residents take pride in their picture-perfect homes, which they continually upgrade. They shop at Home Depot and Bed Bath & Beyond to tackle the smaller home improvement and remodeling tasks but contract out the larger projects.
- To keep up with their busy households, they hire housekeepers or professional cleaners.
- Residents are prepared for the ups and downs in life; they maintain life insurance; homeowners and auto insurance; as well as medical, vision, dental, and prescription insurance through work. They are actively investing for the future; they hold 401(k) and IRA retirement plans, plus securities.
- Consumers spend on credit but have the disposable income to avoid a balance on their credit cards. They spend heavily on Internet shopping; Amazon.com is a favorite website.
- Consumers find time in their busy schedules for themselves. They work out in their home gyms, owning at least a treadmill, an elliptical, or weightlifting equipment. They also visit the salon and spa regularly.
- All family members are avid readers; they read on their smartphones, tablets, and e-readers but also read hard copies of epicurean, home service, and sports magazines.
- Residents, both young and old, are tech savvy; they not only own the latest and greatest in tablets, smartphones, and laptops but actually use the features each has to offer.

#### HOUSING

Median home value is displayed for markets that are primarily owner occupied; average rent is shown for renter-occupied markets. Tenure and home value are estimated by Esri. Housing type and average rent are from the Census Bureau's American Community Survey.



**Typical Housing:**  
Single Family

**Median Value:**  
\$387,000  
US Median: \$177,000



#### POPULATION CHARACTERISTICS

Total population, average annual population change since Census 2010, and average density (population per square mile) are displayed for the market relative to the size and change among all Tapestry markets. Data estimated by Esri.



#### ESRI INDEXES

Esri developed three indexes to display average household wealth, socioeconomic status, and housing affordability for the market relative to US standards.



# NORTH STAR DESTINATION STRATEGIES

COMMUNITY MARKETING AND COMMERCIAL REAL ESTATE RESEARCH AND ANALYSIS

## LEE'S SUMMIT TAPESTRY

### TAPESTRY SEGMENTATION #2: PROFESSIONAL PRIDE

1B

LifeMode Group: Affluent Estates

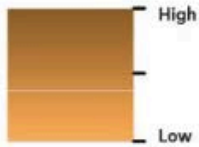
Professional Pride



TAPESTRY  
SEGMENTATION  
[esri.com/tapestry](http://esri.com/tapestry)

#### SEGMENT DENSITY

This map illustrates the density and distribution of the Professional Pride Tapestry Segment by households.





# NORTH STAR DESTINATION STRATEGIES

COMMUNITY MARKETING AND COMMERCIAL REAL ESTATE RESEARCH AND ANALYSIS

## LEE'S SUMMIT TAPESTRY TAPESTRY SEGMENTATION #3 : HOME IMPROVEMENT

Lee's Summit has seen an increasing number of Home Improvement households. These are generally married couple families with single-family homes that are owner-occupied. Details and a description of the Home Improvement Tapestry Segmentation are below.



LifeMode Group: Family Landscapes

### Home Improvement

4B

Households: 2,058,000

Average Household Size: 2.86

Median Age: 37.0

Median Household Income: \$67,000

#### WHO ARE WE?

Married-couple families occupy well over half of these suburban households. Most *Home Improvement* residences are single-family homes that are owner occupied, with only one-fifth of the households occupied by renters. Education and diversity levels are similar to the US as a whole. These families spend a lot of time on the go and therefore tend to eat out regularly. When at home, weekends are consumed with home improvement and remodeling projects.

#### OUR NEIGHBORHOOD

- These are low density suburban neighborhoods.
- Eight of every 10 homes are traditional single-family dwellings, owner occupied.
- Majority of the homes were built between 1970 and 2000.
- More than half of the households consist of married-couple families; another 12% include single-parent families.

#### SOCIOECONOMIC TRAITS

- Higher participation in the labor force and lower unemployment than US levels; most households have 2+ workers.
- Cautious consumers that do their research before buying, they protect their investments.
- Typically spend 4-7 hours per week commuting, and, therefore, spend significant amounts on car maintenance (performed at a department store or auto repair chain store).
- They are paying off student loans and second mortgages on homes.
- They spend heavily on eating out, at both fast-food and family restaurants.
- They like to work from home, when possible.




Note: The index represents the ratio of the segment rate to the US rate weighted by US. Consumer preferences are extracted from data by US CBS.

# NORTH STAR DESTINATION STRATEGIES

COMMUNITY MARKETING AND COMMERCIAL REAL ESTATE RESEARCH AND ANALYSIS


## LEE'S SUMMIT TAPESTRY

### TAPESTRY SEGMENTATION #3 : HOME IMPROVEMENT



LifeMode Group: Family Landscapes

## Home Improvement

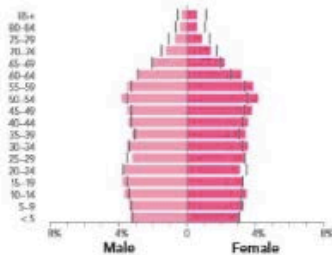


esri.com/tapestry

#### AGE BY SEX (Esri data)

Median Age: 37.0 US: 37.6

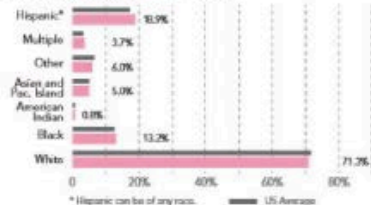
I Indicates US



#### RACE AND ETHNICITY (Esri data)

The Diversity Index summarizes racial and ethnic diversity. The index shows the likelihood that two persons, chosen at random from the same area, belong to different race or ethnic groups. The index ranges from 0 (no diversity) to 100 (complete diversity).

Diversity Index: 63.4 US: 62.1



#### INCOME AND NET WORTH

Net worth measures total household assets (homes, vehicles, investments, etc.) less any debts, secured (e.g., mortgages) or unsecured (credit cards). Household income and net worth are estimated by Esri.

##### Median Household Income

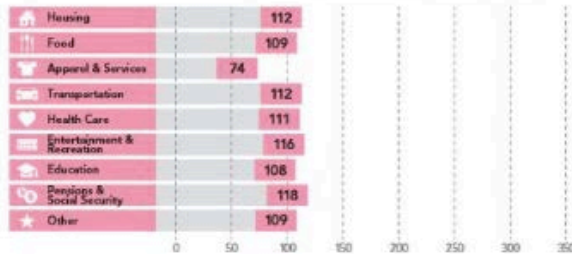


##### Median Net Worth



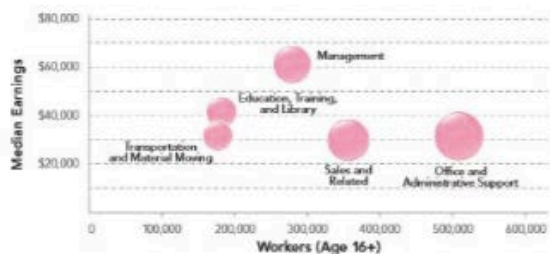
#### AVERAGE HOUSEHOLD BUDGET INDEX

The index compares the average amount spent in this market's household budgets for housing, food, apparel, etc., to the average amount spent by all US households. An index of 100 is average. An index of 120 shows that average spending by consumers in this market is 20 percent above the national average. Consumer expenditures are estimated by Esri.



#### OCCUPATION BY EARNINGS

The five occupations with the highest number of workers in the market are displayed by median earnings. Data from the Census Bureau's American Community Survey.



# NORTH STAR DESTINATION STRATEGIES

COMMUNITY MARKETING AND COMMERCIAL REAL ESTATE RESEARCH AND ANALYSIS

## LEE'S SUMMIT TAPESTRY

### TAPESTRY SEGMENTATION #3 : HOME IMPROVEMENT

#### 4B LifeMode Group: Family Landscapes Home Improvement



#### MARKET PROFILE (Consumer preferences are estimated from data by GfK MRI)

- Enjoy working on home improvement projects and watching DIY networks.
- Make frequent trips to warehouse/club and home improvement stores in their minivan or SUV.
- Own a giant screen TV with fiber-optic connection and premium cable; rent DVDs from Redbox or Netflix.
- Very comfortable with new technology; embrace the convenience of completing tasks on a mobile device.
- Enjoy dining at Chili's, Chick-fil-A, and Panera Bread.
- Frequently buy children's clothes and toys.

#### HOUSING

Median home value is displayed for markets that are primarily owner occupied; average rent is shown for renter-occupied markets. Tenure and home value are estimated by Esri. Housing type and average rent are from the Census Bureau's American Community Survey.



**Typical Housing:**  
Single Family  
**Median Value:**  
\$174,000  
US Median: \$177,000



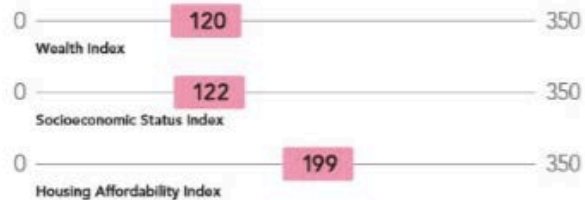
#### POPULATION CHARACTERISTICS

Total population, average annual population change since Census 2010, and average density (population per square mile) are displayed for the market relative to the size and change among all Tapestry markets. Data estimated by Esri.



#### ESRI INDEXES

Esri developed three indexes to display average household wealth, socioeconomic status, and housing affordability for the market relative to US standards.

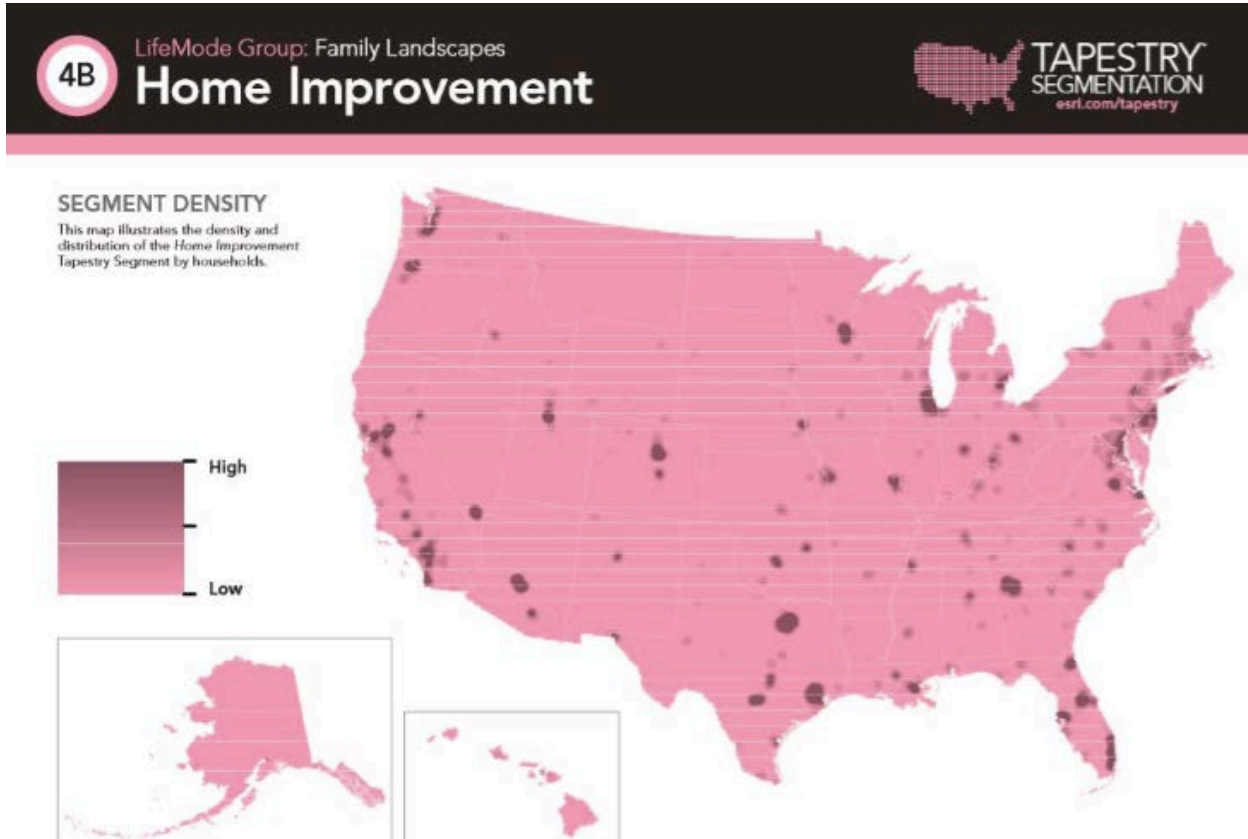


# NORTH STAR DESTINATION STRATEGIES

COMMUNITY MARKETING AND COMMERCIAL REAL ESTATE RESEARCH AND ANALYSIS

## LEE'S SUMMIT TAPESTRY

### TAPESTRY SEGMENTATION #3 : HOME IMPROVEMENT




# NORTH STAR DESTINATION STRATEGIES

COMMUNITY MARKETING AND COMMERCIAL REAL ESTATE RESEARCH AND ANALYSIS

## LEE'S SUMMIT TAPESTRY

### TAPESTRY SEGMENTATION #4 : OLD & NEWCOMERS

Another growing tapestry segmentation in Lee's Summit is the Old & Newcomers, characterized by a singles lifestyle that is budget conscious. Details and a description of the Old & Newcomer Tapestry Segmentation are below.



LifeMode Group: Middle Ground

## Old and Newcomers

8F

Households: 2,774,000

Average Household Size: 2.11

Median Age: 38.5

Median Household Income: \$39,000

#### WHO ARE WE?

This market features singles' lifestyles, on a budget. The focus is more on convenience than consumerism, economy over acquisition. *Old and Newcomers* is composed of neighborhoods in transition, populated by renters who are just beginning their careers or retiring. Some are still in college; some are taking adult education classes. They support environmental causes and Starbucks. Age is not always obvious from their choices.

#### OUR NEIGHBORHOOD

- Metropolitan city dwellers.
- Predominantly single households (Index 148), with a mix of married couples (no children); average household size lower at 2.11.
- 54% renter occupied; average rent, \$800 (Index 88).
- 45% of housing units are single-family dwellings; 44% are multiunit buildings in older neighborhoods, built before 1980.
- Average vacancy rate at 11%.

#### SOCIOECONOMIC TRAITS

- Unemployment is lower at 7.8% (Index 91), with an average labor force participation rate of 62.6%, despite the increasing number of retired workers.
- 30% of households are currently receiving Social Security.
- 28% have a college degree (Index 99), 33% have some college education, 10% are still enrolled in college (Index 126).
- Consumers are price aware and coupon clippers, but open to impulse buys.
- They are attentive to environmental concerns.
- They are more comfortable with the latest technology than buying a car.



Index 1 is the index represents the ratio of the segment rate to the US rate weighted by 100. Consumer preferences are estimated from data by CUREMI.

# NORTH STAR DESTINATION STRATEGIES

COMMUNITY MARKETING AND COMMERCIAL REAL ESTATE RESEARCH AND ANALYSIS

## LEE'S SUMMIT TAPESTRY

### TAPESTRY SEGMENTATION #4 : OLD & NEWCOMERS

8F

LifeMode Group: Middle Ground

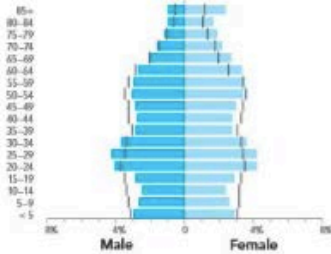
## Old and Newcomers



**TAPESTRY SEGMENTATION**  
esri.com/tapestry

#### AGE BY SEX (Est. data)

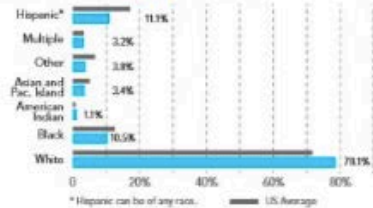
Median Age: **38.5** US: 37.6  
1 Indicates US



#### RACE AND ETHNICITY (Est. data)

The Diversity Index summarizes racial and ethnic diversity. The index shows the likelihood that two persons, chosen at random from the same area, belong to different race or ethnic groups. The index ranges from 0 (no diversity) to 100 (complete diversity).

Diversity Index: **50.1** US: 62.1



#### INCOME AND NET WORTH

Net worth measures total household assets (homes, vehicles, investments, etc.) less any debts, secured (e.g., mortgages) or unsecured (credit cards). Household income and net worth are estimated by Esri.

##### Median Household Income

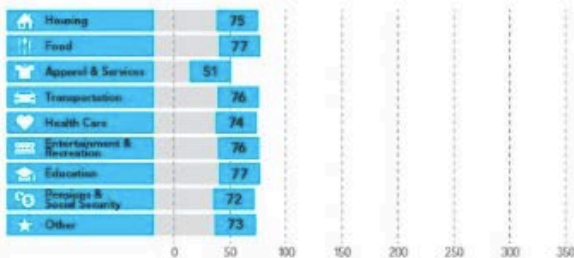


##### Median Net Worth



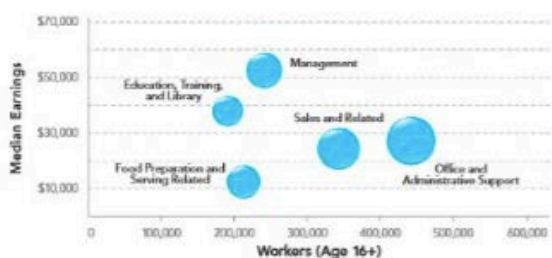
#### AVERAGE HOUSEHOLD BUDGET INDEX

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#### OCCUPATION BY EARNINGS

The five occupations with the highest number of workers in the market are displayed by median earnings. Data from the Census Bureau's American Community Survey.



# NORTH STAR DESTINATION STRATEGIES

COMMUNITY MARKETING AND COMMERCIAL REAL ESTATE RESEARCH AND ANALYSIS

## LEE'S SUMMIT TAPESTRY

### TAPESTRY SEGMENTATION #4 : OLD & NEWCOMERS

#### 8F LifeMode Group: Middle Ground Old and Newcomers



#### MARKET PROFILE (Consumer preferences are estimated from data by CTR MRI)

- Residents are strong supporters of environmental organizations.
- They prefer cell phones to landlines.
- Entertainment features the Internet (dating sites and games), movies at home, country music, and newspapers.
- Vehicles are basically just a means of transportation.
- Food features convenience, frozen and fast food.
- They do banking as likely in person as online.

#### HOUSING

Median home value is displayed for markets that are primarily owner occupied; average rent is shown for markets that are primarily renter occupied. Tenure and home value are estimated by Esri. Housing type and average rent are from the Census Bureau's American Community Survey.



**Typical Housing:**  
Single Family;  
Multiunits

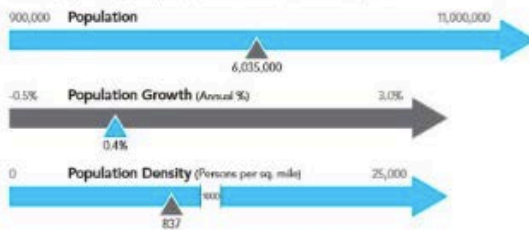
**Average Rent:**  
\$850

US Average: \$900



#### POPULATION CHARACTERISTICS

Total population, average annual population change since Census 2010, and average density (population per square mile) are displayed for the market relative to the size and change among all Tapestry markets. Data estimated by Esri.



#### ESRI INDEXES

Esri developed three indexes to display average household wealth, socioeconomic status, and housing affordability for the market relative to US standards.



# NORTH STAR DESTINATION STRATEGIES

COMMUNITY MARKETING AND COMMERCIAL REAL ESTATE RESEARCH AND ANALYSIS

## LEE'S SUMMIT TAPESTRY

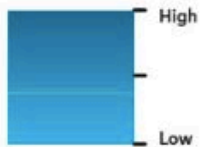
### TAPESTRY SEGMENTATION #4 : OLD & NEWCOMERS

**8F** LifeMode Group: Middle Ground  
**Old and Newcomers**

TAPESTRY SEGMENTATION  
[esri.com/tapestry](http://esri.com/tapestry)

#### SEGMENT DENSITY

This map illustrates the density and distribution of the Old and Newcomers Tapestry Segment by households.






# NORTH STAR DESTINATION STRATEGIES

COMMUNITY MARKETING AND COMMERCIAL REAL ESTATE RESEARCH AND ANALYSIS

## LEE'S SUMMIT TAPESTRY TAPESTRY SEGMENTATION #5: BRIGHT YOUNG PROFESSIONALS

The Bright Young Professionals tapestry segmentation is also noted in recent Lee's Summit data. Bright Young Professionals are typically young, educated professionals living on urban outskirts. Details and a description of The Bright Young Professionals tapestry segmentation are below.



LifeMode Group: Middle Ground

### Bright Young Professionals

8C

Households: 2,613,000

Average Household Size: 2.40

Median Age: 32.2

Median Household Income: \$50,000

#### WHO ARE WE?

*Bright Young Professionals* is a large market, primarily located in urban outskirts of large metropolitan areas. These communities are home to young, educated, working professionals. One out of three householders is under the age of 35. Slightly more diverse couples dominate this market, with more renters than homeowners. More than two-fifths of the households live in single-family homes; over a third live in 5+ unit buildings. Labor force participation is high, generally white-collar work, with a mix of food service and part-time jobs (among the college students). Median household income, median home value, and average rent are close to the US values. Residents of this segment are physically active and up on the latest technology.

#### OUR NEIGHBORHOOD

- Approximately 56% of the households rent; 44% own their homes.
- Household type is primarily couples, married (or unmarried), with above average concentrations of both single-parent (Index 125) and single-person (Index 115) households.
- Multiunit buildings or row housing make up 55% of the housing stock (row housing (Index 182), buildings with 5–19 units (Index 277)); 44% built 1980–99.
- Average rent is slightly higher than the US (Index 102).
- Lower vacancy rate is at 8.9%.

#### SOCIOECONOMIC TRAITS

- Education completed: 36% with some college or an associate's degree, 30% with a bachelor's degree or higher. Education in progress is 10% (Index 127).
- Unemployment rate is lower at 7.1%, and labor force participation rate of 73% is higher than the US rate.
- These consumers are up on the latest technology.
- They got most of their information from the Internet.
- Concern about the environment, impacts their purchasing decisions.



Note: The Index represents the ratio of the segment rate to the US rate multiplied by 100. Consumer performance an estimated from data by QSR, INC.

# NORTH STAR DESTINATION STRATEGIES

COMMUNITY MARKETING AND COMMERCIAL REAL ESTATE RESEARCH AND ANALYSIS

## LEE'S SUMMIT TAPESTRY TAPESTRY SEGMENTATION #5: BRIGHT YOUNG PROFESSIONALS

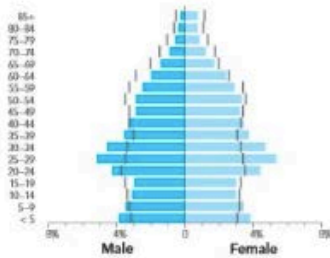
LifeMode Group: Middle Ground

### Bright Young Professionals

esri.com/Tapestry

### AGE BY SEX (in dist)

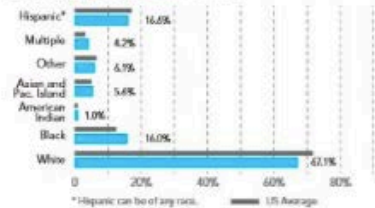
Median Age: **32.2** US: 37.6  
I indicates US



### RACE AND ETHNICITY (in dist)

The Diversity Index summarizes racial and ethnic diversity. The index shows the likelihood that two persons, chosen at random from the same area, belong to different races or ethnic groups. The index ranges from 0 (no diversity) to 100 (complete diversity).

Diversity Index: **65.4** US: 62.1



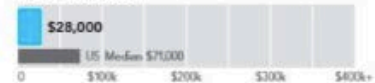
### INCOME AND NET WORTH

Net worth measures total household assets (homes, vehicles, investments, etc.) less any debts, secured (e.g., mortgages) or unsecured (credit cards). Household income and net worth are estimated by Esri.

#### Median Household Income

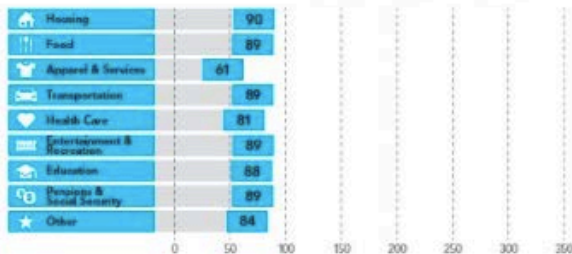


#### Median Net Worth



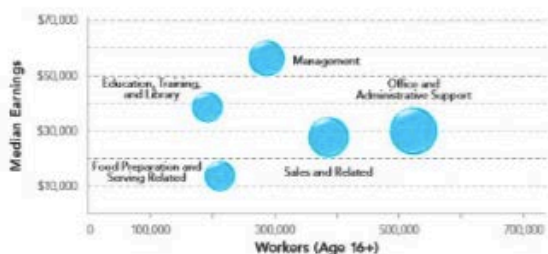
### AVERAGE HOUSEHOLD BUDGET INDEX

The index compares the average amount spent in this market's household budgets for housing, food, apparel, etc., to the average amount spent by all US households. An index of 100 is average. An index of 120 shows that average spending by consumers in this market is 20 percent above the national average. Consumer expenditures are estimated by Esri.



### OCCUPATION BY EARNINGS

The five occupations with the highest number of workers in the market are displayed by median earnings. Data from the Census Bureau's American Community Survey.



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LifeMode Group: Middle Ground

### Bright Young Professionals



TAPESTRY  
SEGMENTATION  
esri.com/tapestry

#### MARKET PROFILE

(Consumer preferences are estimated from data by GRM MR)

- Own US savings bonds.
- Own newer computers (desktop, laptop, or both), iPods, and 2+ TVs.
- Go online to do banking, access YouTube or Facebook, visit blogs, and play games.
- Use cell phones to text, redeem mobile coupons, listen to music, and check for news and financial information.
- Find leisure going to bars/clubs, attending concerts, going to the zoo, and renting DVDs from Redbox or Netflix.
- Read sports magazines and participate in a variety of sports, including backpacking, basketball, football, bowling, Pilates, weight lifting, and yoga.
- Eat out often at fast-food and family restaurants.

#### HOUSING

Median home value is displayed for markets that are primarily owner occupied; average rent is shown for renter-occupied markets. Tenure and home value are estimated by Esri. Housing type and average rent are from the Census Bureau's American Community Survey.



**Typical Housing:**  
Single Family;  
Multiunits  
**Average Rent:**  
\$1,000  
US Average: \$700



#### POPULATION CHARACTERISTICS

Total population, average annual population change since Census 2010, and average density (population per square mile) are displayed for the market relative to the size and change among all Tapestry markets. Data estimated by Esri.



#### ESRI INDEXES

Esri developed three indexes to display average household wealth, socioeconomic status, and housing affordability for the market relative to US standards.



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LifeMode Group: Middle Ground

### Bright Young Professionals



TAPESTRY  
SEGMENTATION  
[enr.com/tapestry](http://enr.com/tapestry)

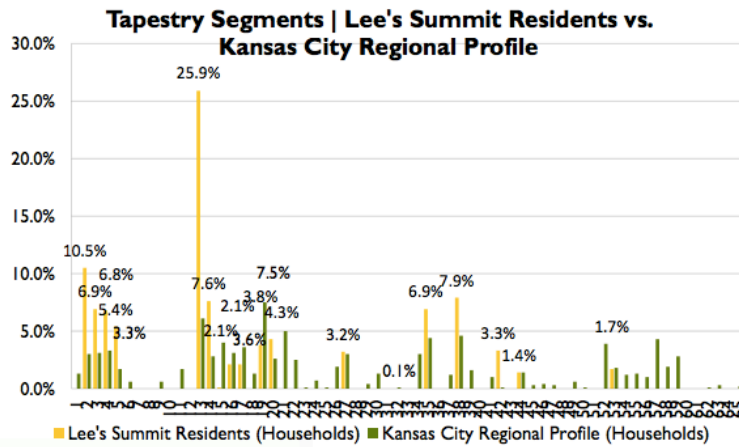
#### SEGMENT DENSITY

This map illustrates the density and distribution of the Bright Young Professionals Tapestry Segment by households.



# NORTH STAR DESTINATION STRATEGIES

## COMMUNITY MARKETING AND COMMERCIAL REAL ESTATE RESEARCH AND ANALYSIS



\$\$\$ Affluence Range \$

### LifeMode Group: Family Landscapes Soccer Moms

Soccer Moms is an affluent, family-oriented market with a country flavor. Residents are partial to new housing away from the bustle of the city but close enough to commute to professional job centers. Life in this suburban wilderness offsets the hectic pace of two working parents with growing children. They favor time-saving devices, like banking online or housekeeping services, and family-oriented pursuits.

- Education: 37.7% college graduates; more than 70% with some college education.
- Low unemployment at 5.9%; high labor force participation rate at 72%; 2 out of 3 households include 2+ workers (Index 124).

### LifeMode Group: Affluent Estates Professional Pride

Professional Pride consumers are well-educated career professionals that have prospered through the Great Recession. To maintain their upscale suburban lifestyles, these goal oriented couples work, often commuting far and working long hours. However, their schedules are fine-tuned to meet the needs of their school age children. They are financially savvy; they invest wisely and benefit from interest and dividend income. So far, these established families have accumulated an average of 1.5 million dollars in net worth, and their annual household income runs at more than twice the US level. They take pride in their newer homes and spend valuable time and energy upgrading. Their homes are furnished with the latest in home trends, including finished basements equipped with home gyms and in-home theaters.

2011

vs

2015

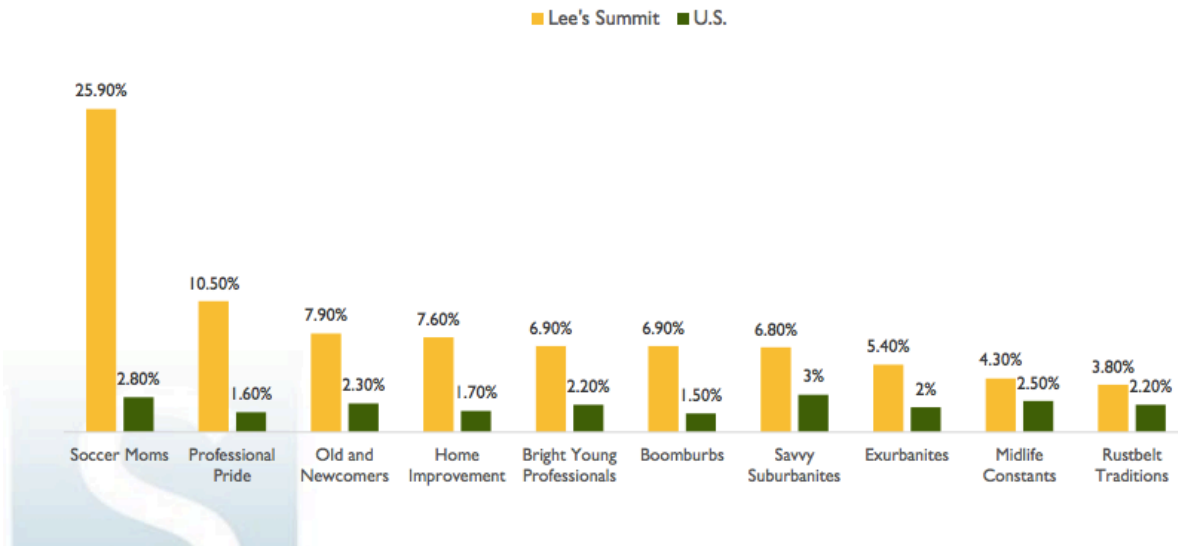
Residents	Percentage	Kansas City Regional Profile	Percentage
12 Up and Coming Families	22.6%	32 Rustbelt Traditions	8.4%
04 Boomburbs	15.0%	12 Up and Coming Families	6.7%
06 Sophisticated Squires	11.7%	04 Boomburbs	5.5%
13 In Style	7.3%	19 Milk and Cookies	5.1%
28 Aspiring Young Families	6.2%	17 Green Acres	4.7%
02 Suburban Splendor	6.0%	18 Cozy and Comfortable	4.4%
33 Midlife Junction	5.6%	06 Sophisticated Squires	4.3%
48 Great Expectations	5.5%	28 Aspiring Young Families	4.2%
07 Exurbanites	5.4%	48 Great Expectations	3.9%
43 The Elders	4.8%	39 Young and Restless	3.5%

Residents	Percentage	Kansas City Regional Profile	Percentage
4A Soccer Moms	25.9%	5D Rustbelt Traditions	7.5%
1B Professional Pride	10.5%	4A Soccer Moms	6.1%
8F Old and Newcomers	7.9%	6A Green Acres	5.0%
4B Home Improvement	7.6%	8F Old and Newcomers	4.6%
8C Bright Young Professionals	6.9%	8C Bright Young Professionals	4.4%
1C Boomburbs	6.9%	12B Traditional Living	4.3%
1D Savvy Suburbanites	6.8%	4C Middleburg	4.0%
1E Exurbanites	5.4%	11B Young and Restless	3.9%
5E Midlife Constants	4.3%	5B In Style	3.6%
5D Rustbelt Traditions	3.8%	1D Savvy Suburbanites	3.3%

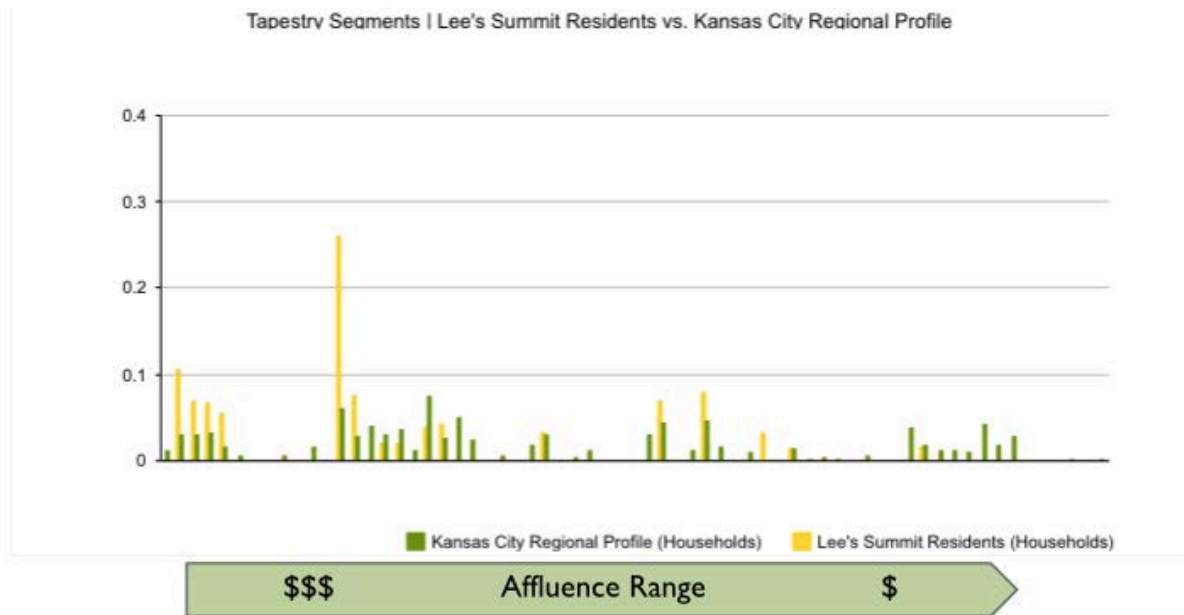
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## Top Ten Tapestry Segments Lee's Summit vs U.S.



## Tapestry Segments | Lee's Summit Residents vs. Kansas City Regional Profile



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