

## **APPENDIX B**

### **Market Analysis Summary (2015 Master Plan)**

# TOWN OF CAREFREE CAREFREE VILLAGE CENTER MASTER PLAN

## MARKET ANALYSIS



SUBMITTED BY:



ESI CORPORATION

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## Disclaimer

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*All direct and indirect written information supplied by the client, its agents and assigns, concerning the community is assumed to be true, accurate and complete; additionally, information identified as supplied or prepared by others is believed to be reliable. However, no responsibility for the accuracy of such information is assumed.*

*This analysis is for the sole purpose of assisting the Town of Carefree in assessing commercial demand to aid in the creation of the downtown redevelopment plan and marketing to prospective tenants or investors.*

*ESI Corp makes no claim that this study may be used for a specific development and makes no claims that any business sited will be financially successful. This analysis is not intended to be a specific market study for a specific type of retail, office or housing development and should not be viewed as such. Any entity that seeks to invest in, develop or redevelop any retail, office or residential project should undertake their own detailed and specific market study for the exact intended type of development. ESI Corp takes no responsibility for any results or consequences resulting from using this study in any way, intended and, or unintended.*

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# I. INTRODUCTION

## **BACKGROUND**

The Town of Carefree is situated in the northeastern quadrant of the Phoenix metropolitan area. The community is located approximately 35 miles from downtown Phoenix, approximately 10 miles north of Loop 101 and approximately 10 miles west of the I-17. Carefree is bordered on its western boundary by the Town of Cave Creek; on the south and east by the City of Scottsdale and on the north by unincorporated land in Maricopa County. The City of Phoenix is located south and west of Carefree.

The Carefree Village is the heart of the central business district for the Town of Carefree and historically has been a place where Carefree residents shop, dine and visit. Over the years the Carefree Village has faced several challenges including expanded competition for retail sales from neighboring communities, aging commercial space, an increase in vacancy rates, the absence of private sector investment within the Village, and a lack of sense of entry and visibility to potential visitors. This has resulted in a steady decline in per capita government revenues to adequately sustain the community's quality of life. Town leaders recognize these challenges and have determined that a market study is needed to uncover the Carefree Village market potential and provide general guidance to the creation of a Carefree Village Master Plan.

This market study was conducted to provide timely information on existing and future market dynamics for Carefree, including socio-demographics, retail trade leakage, real estate supply and demand, and a consumer survey of residents and visitors to Carefree. This survey was conducted to understand existing shopping patterns and identify potential opportunities that attract and retain the types of businesses that complement the Carefree Village and meet consumer demands.

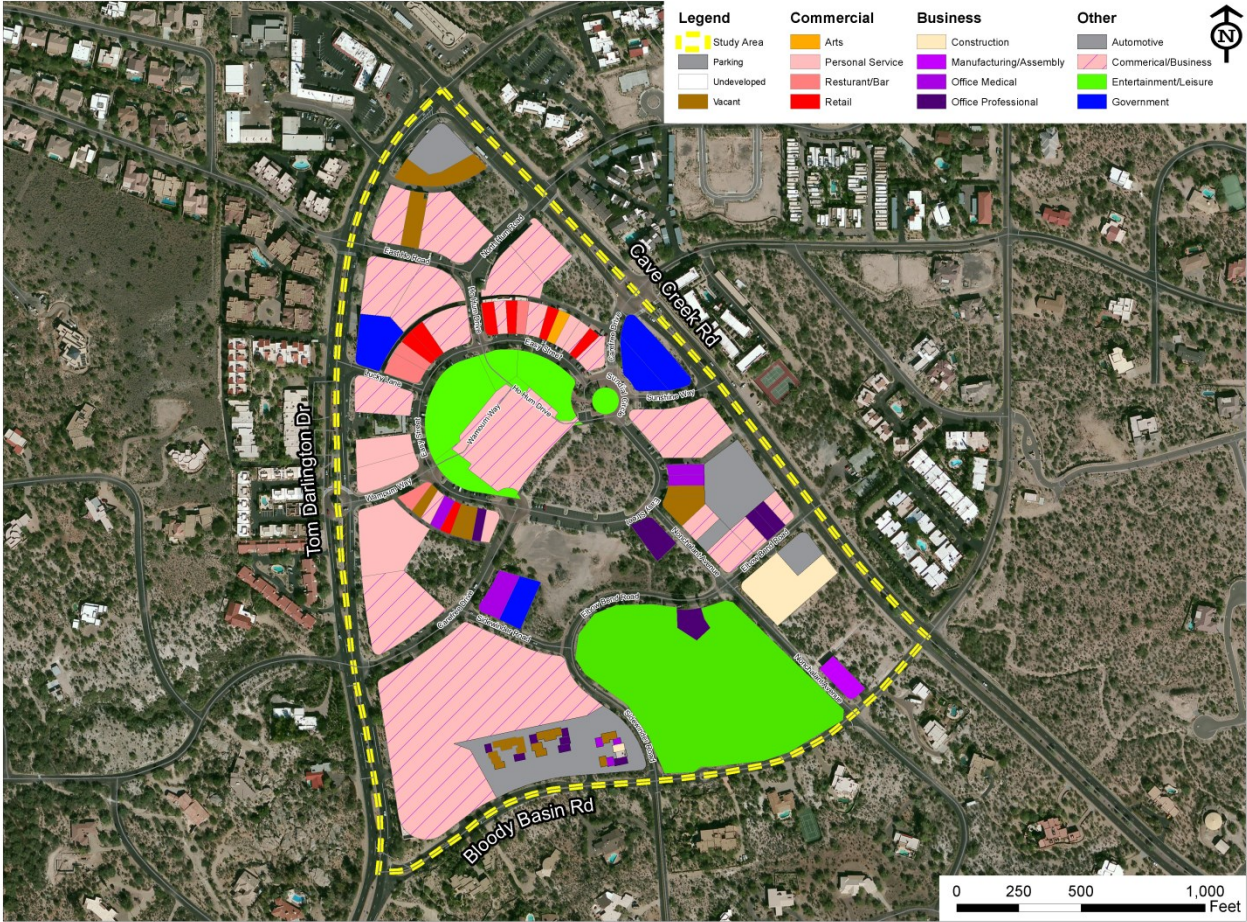
Data that was utilized in this market analysis come from a variety of sources including the Town of Carefree, U.S. Census, Maricopa Association of Governments (MAG), Maricopa County Assessor's Office, Esri, and Colliers International.

## **STUDY AREA**

The Carefree Village is estimated to consist of 68 acres and is located generally south of Cave Creek Road, east of Tom Darlington Drive and north of Bloody Basin Road, as depicted in Figure 1. The Village Center is home to Carefree's municipal government and community amenities including the Desert Garden and Sundial. The mix of business establishments range from retail and restaurants to office, including professional and healthcare services, entertainment and government.



Figure 1 - Carefree Village Town Center



A database of establishments was provided by the Maricopa County Assessor’s Office which lists each establishment by parcel number. According to this database there are 153 establishments located in the Carefree Village. The following table provides a breakdown by type of business currently located within the Carefree Village. There is a total of 42 retail and restaurant/bar establishments and a very high concentration of non-retail type businesses including medical, personal and professional office uses.



**Table 1 - Carefree Town Center Establishment Mix**

<b>Establishment Type</b>	<b>Count</b>
Construction	9
Government/Religious	3
Manufacturing	5
Office Medical	19
Office Professional	31
Personal Services	44
Restaurant/Bar	12
Retail	30
<b>Total</b>	<b>153</b>

Source: Town of Carefree

There is a total of 403,291 square feet of space within the Carefree Village, which includes office, retail, restaurants, government, and religious and civic organizations. The predominate land use by square feet is office at 209,724 square feet followed by retail at 108,802 square feet. Medical and dental comprise 10,486 square feet with government at 13,013.

### REPORT OVERVIEW

This report is organized in a series of chapters that provide background information, original research and real estate demand analysis. Chapter 2 provides a summary of the key findings. Chapter 3 provides a comprehensive overview of the Carefree market and Market Trade Area including socio-demographics and Tapestry Segmentation. Chapter 4 reveals the high level findings of the consumer survey, and Chapter 5 covers historical tax collections, trade leakage, retail gaps and the projected demand for retail and office space within Carefree Village.



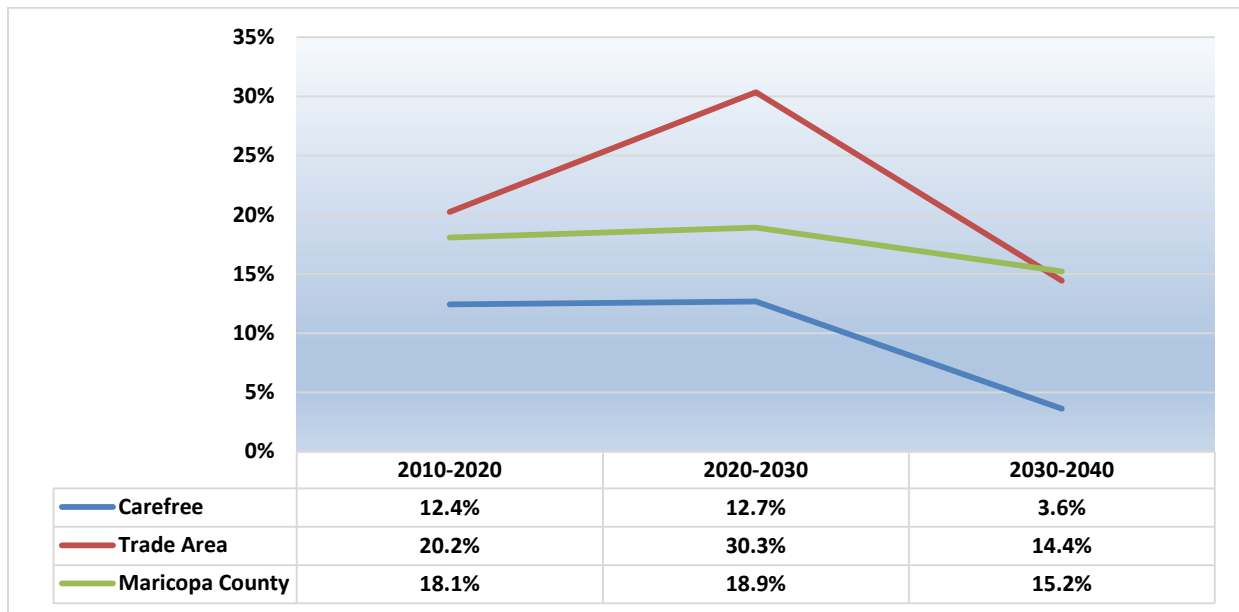


## II. SUMMARY OF FINDINGS

### SOCIO-DEMOGRAPHICS

Research was conducted on the socio-demographics of the Town of Carefree and a geographically defined trade area. The Market Trade Area for Carefree encompasses 148 square miles and includes Cave Creek, and portions of the cities of Phoenix and Scottsdale, as depicted in Figure 3. The current population of the trade area is 82,150 compared to the Town of Carefree at 3,451. Carefree population projections were compared against the Market Trade Area and Maricopa County as a whole by decade. The population growth rate varies by region and shows that the greatest rate of growth for Carefree will occur between 2020 and 2030 at nearly 13 percent and then drops sharply between 2030 and 2040. The Trade Area outpaces the County’ projected growth rate for the periods between 2010 through 2030.

**Figure 2 - Population Growth Rate per Decade, Carefree, Market Trade Area and Maricopa County**



Source: MAG

Residents of the Town and Carefree and the Market Trade Area are among the most affluent in the metro Phoenix area with a median household income of \$87,938 and \$102,972 respectively. Carefree residents are higher educated than the County with 61 percent, more than double, having a Bachelor’s Degree or higher compared to the County at 30 percent.

When it comes to income and net worth, residents in Carefree and the Market Trade Area hold an impressive amount of wealth. Their disposable income is significant and they spend it on dining, specialty food and luxury items, household furnishings, and travel and leisure activities. They are generous supporters of charitable organizations and the arts.

On a workday basis, there are nearly an equal number of people out commuting to work as in commuting to Carefree for jobs. These workers who come to Carefree represent a potential customer base for the restaurants, bars and retail in the Carefree Village, and are included in the retail demand model.



## SURVEY RESULTS

Obtaining original research was a cornerstone of the market analysis to understanding shopping patterns, buying habits, and opinions about the Carefree Village, as well as desires for the type of retail and improvements needed. To accomplish this an internet based survey was conducted that yielded a total of 505 responses received from primarily Carefree and Cave Creek residents, but also residents in Scottsdale and Phoenix.

Overall, the respondents have expressed the need for more variety in retail and restaurant offerings within the Carefree Village. Below is a summary of the key findings for all respondents:

- 43% eat out 2-4 times per week
- 20% frequent the Village Center to eat out once or more per week
- The top 3 reasons for coming to the Carefree Village are dining, grocery shopping, and attending festivals.
- 32% shop at the Basha's Center more than once per week
- 40% shop at Kierland Commons once every few months
- 78% want a greater variety of stores and 60% want more restaurants
- Of the top five business that respondents desire, the top three are food related and include restaurants, specialty food store, and bakery
- The top two type of restaurants that respondents would like include Mexican and delicatessen
- 73% would like to see concerts and shows in the amphitheater
- 41% would consider or might consider living in the Village Center
- 68% indicated that the most appealing scenario for the Carefree Village is “a meeting place and the center of community activities with a mix of coffee shops, brew pubs, cultural and recreation spaces.”

Survey data was also tabulated to carve out Carefree residents from total respondents in order to identify any significant differences in their responses. The findings of the survey conclude that a larger percentage of Carefree residents eat out once a week than nonresidents; and 27% of Carefree residents visit the Carefree Village once a week or more, and want more competitive pricing and better quality merchandise. Changes that nonresidents want include evening store hours, consistent store hours and improved parking.

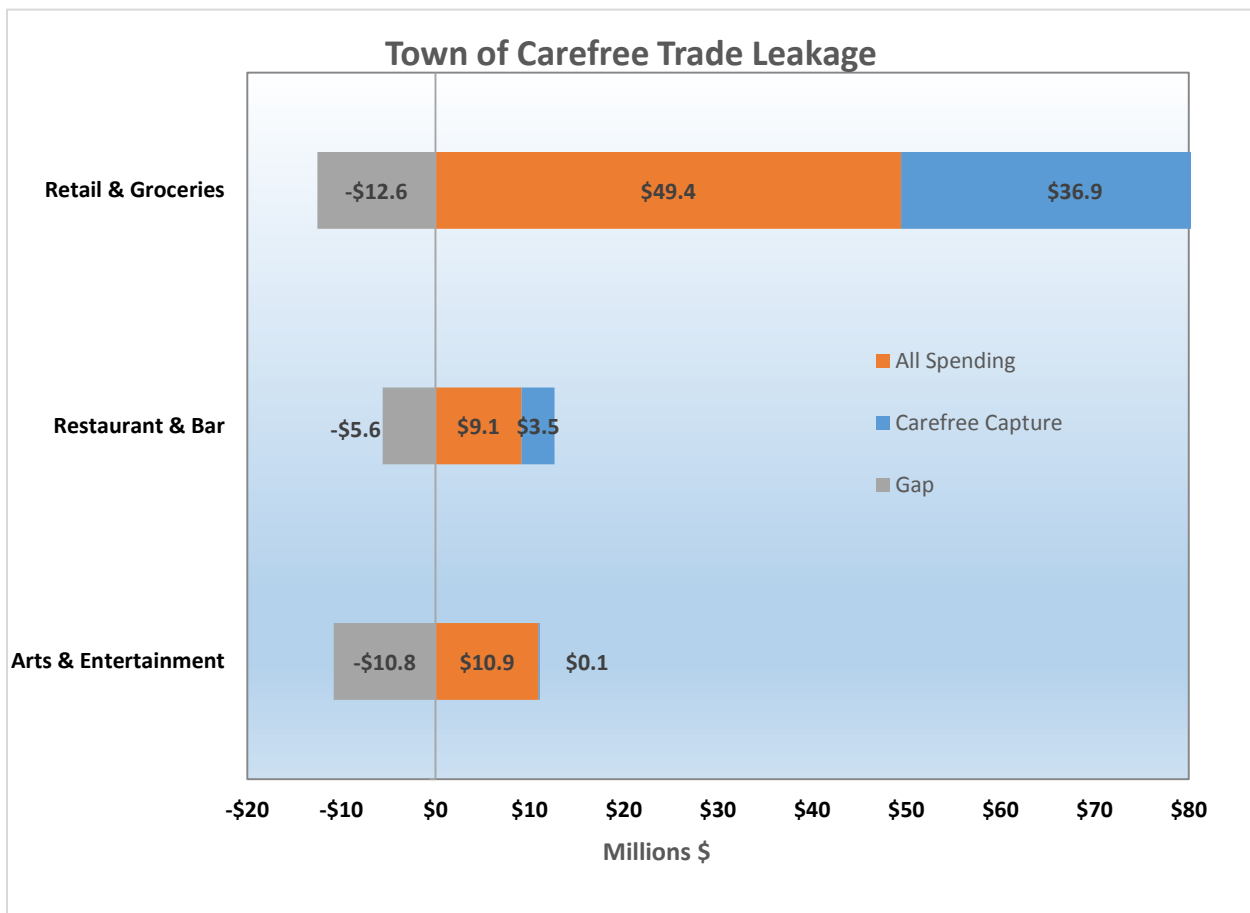




## DEMAND ANALYSIS

Several tasks were undertaken within the demand analysis to gain a comprehensive understanding of consumer spending, and trade leakage and gaps. Commercial real estate trends for Carefree and the Market Trade Area were analyzed and the future demand for square feet was forecasted. These findings, coupled with the Tapestry Lifestyle data provide the market intelligence to identify potential commercial and entertainment activities for Carefree Village.

Over the last five years, retail tax collections have experienced a steady decline from \$347 per capita to \$332 per capita. The biggest amount of trade leakage occurs within the retail-grocery category at \$12.6 million followed by arts and entertainment at \$10.8 million and restaurant and bar at \$5.6 million. Carefree residents spend \$69.4 million annual on all retail items of which 58.4% percent of the spending remains in Carefree.



A Leakage/Surplus index was calculated across several retail product categories to compare the supply and demand. Out shopping is taking place in nearly every category with the exception of lawn and garden equipment and supplies and beer, wine and liquor. In these two categories, Carefree is capturing resident spending from outside the Town of Carefree.

The demand for retail and office space was analyzed beginning with a baseline year of 2014 and projecting square feet of demand for 2020, 2030 and 2040. In 2014 the Carefree market can support a total of 261,598 square feet of retail space. However, when compared to the total inventory of retail



space in Carefree (286,081 square feet) there is a calculated surplus of 24,483 square feet of space. By 2020 the market is presumed to support 289,013 square feet showing a shortage of 2,932 square feet. Over the 26 year time horizon, the net new demand for retail space amounts to 82,165 square feet.

	2014	2020	2030	2040
<b>Retail</b>				
Total Forecast Demand in sq. ft.	261,598	289,013	327,261	343,763
Existing Square Feet	<u>286,081</u>	<u>286,081</u>	<u>286,081</u>	<u>286,081</u>
(Excess)/Shortage	(24,483)	2,932	41,180	57,682
<b>Office</b>				
Total Forecast Demand in sq. ft.	197,596	236,344	252,358	239,684
Existing Square Feet	<u>231,579</u>	<u>231,579</u>	<u>231,579</u>	<u>231,579</u>
(Excess)/Shortage	(33,983)	4,765	20,779	8,105

What the analysis does not take into consideration is the amount of existing square footage that is not desirable to retail tenants due to its location or size. Meaning, that the market may very well be likely to support additional retail if existing space was redeveloped or new space built.

## MARKET SEGMENTS

It is important to bear in mind that there are a variety of variables that will influence the outcome of these findings, including existing and future competition, growth in the market and area demographics. In addition to the site location criteria of population threshold, many retailers and restaurants also have additional location criteria including: a minimum number of cars per day, a targeted demographic group (age, income, etc.), type of location, and preferred co-tenants such as grocery/supermarket, entertainment, fashion, etc.

Utilizing the findings of the consumer expenditure gap analysis combined with the Carefree consumer survey and Tapestry Segmentation information there appears to be a variety of commercial and entertainment related activity that Carefree should target, as noted below.

### Carefree Village Commercial and Entertainment Potential

#### Restaurants

- Mexican
- Delicatessen/casual cafes and bistros
- Organic/healthy
- Seafood
- Brew pub/wine bar
- Organic/healthy

#### Specialty Food Stores

- Bakery
- Wine and artisan cheese
- Organic/healthy
- Butcher/specialty meats

#### Retail

- Clothing and Accessories
- Pet supplies and services
- Luggage and leather goods
- Sports/recreation/exercise equipment
- Health and personal care stores
- Book, periodical and music stores

#### Entertainment

- Performing arts
- Culinary festivals
- Concerts and shows in the amphitheater
- Art festivals



The current mix of retail uses in the Carefree Village is not in line with what consumer's desire, as concluded from the consumer survey. Getting the right mix of retail that consumer's demand will invigorate the Carefree Village and allow it to compete with other comparable retail destinations. The challenge will be encouraging landlords to recruit appropriate high-quality tenants that match the interests of Carefree residents and the Market Trade Area, rather than leasing space to whomever is willing to pay the rent.

Office uses are demand anchors for retailers and restaurants, especially in the morning and at noontime. Professional practices that include medical, legal and financial services are also desirable as they steadily attract visitors and employ office staff, all who are potential shoppers.

Civic, cultural and entertainment anchors also attract a high number of visitors and create the opportunity for cross marketing with area restaurants and retailers. Nighttime uses such as restaurants and theaters can help make up for the smaller daytime population from office workers.

Adding residential living to a downtown or urban village has proven to be successful in other markets. New housing opportunities add excitement and helps create a sense of place. In addition, a residential component provides a built in customer base that can support existing retail and restaurants and serve as a draw to attract new business. Finally, the survey findings indicated a desire for living in the Carefree Village.



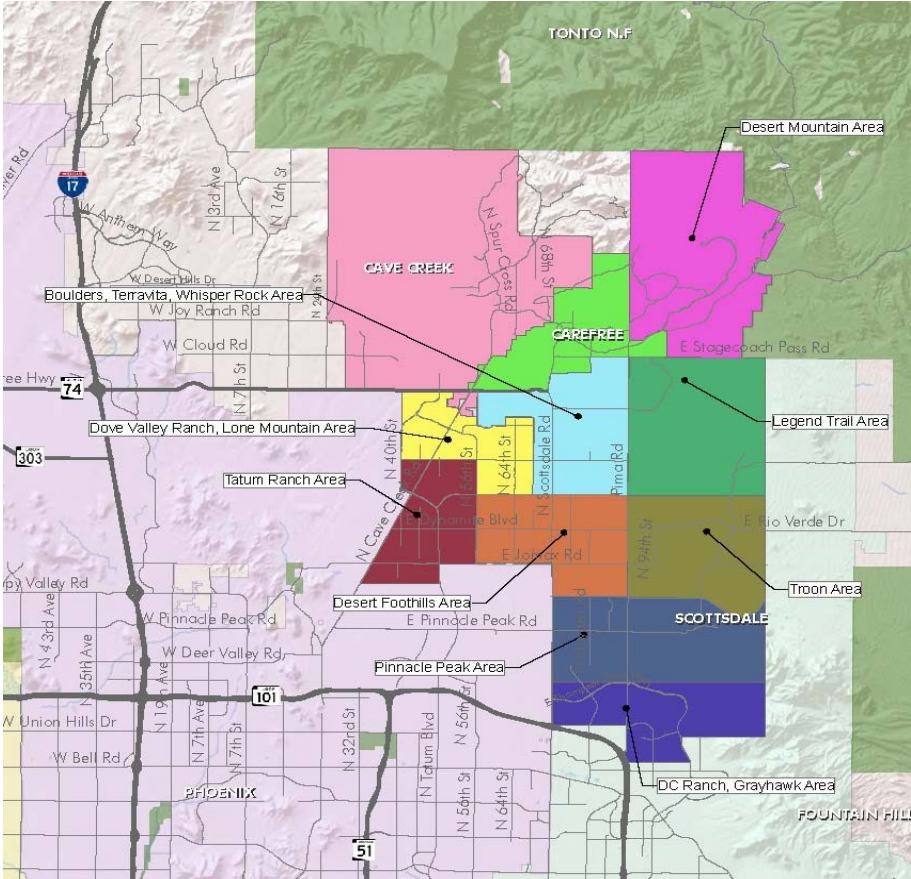
# III. MARKET OVERVIEW

Research was conducted on the socio-demographics of the Town of Carefree and a geographically defined trade area. The findings of this research paints a picture of the consumer marketplace including population, household types, and spending patterns. In collaboration with the Carefree Steering Committee, a market trade that extends beyond the boundaries of the Town of Carefree was defined. This market trade area represents the potential “reach” that Carefree has in drawing in consumers from outside the Town. Delineating the trade area helps with understanding the buying power of the customer base and the potential for any new business or real estate opportunities.

## CAREFREE TRADE AREA

The Market Trade Area for Carefree, as depicted in Figure 3, encompasses 148 square miles and includes Cave Creek, and portions of the cities of Phoenix and Scottsdale. The current population of the trade area is 82,150 compared to the Town of Carefree at 3,451. Population projections show that through 2040 Carefree is expected to experience a 28 percent growth rate compared to the trade area at 72 percent.

Figure 3 - Carefree Market Trade Area



## SOCIO-DEMOGRAPHICS

### Population and Households

Population projections through 2040 were obtained from the Maricopa Association of Governments for the Town of Carefree, the Market Trade Area and Maricopa County. These projections were used in the retail and office demand models to identify future demand for square feet that could be supported in the Carefree Village. The projected rate of growth over the 30 year time horizon, shown in Table 2, is the greatest for the market trade area at 72 percent, which leads the projected growth rate for all of Maricopa County. The Town of Carefree is projected to increase by 28 percent.

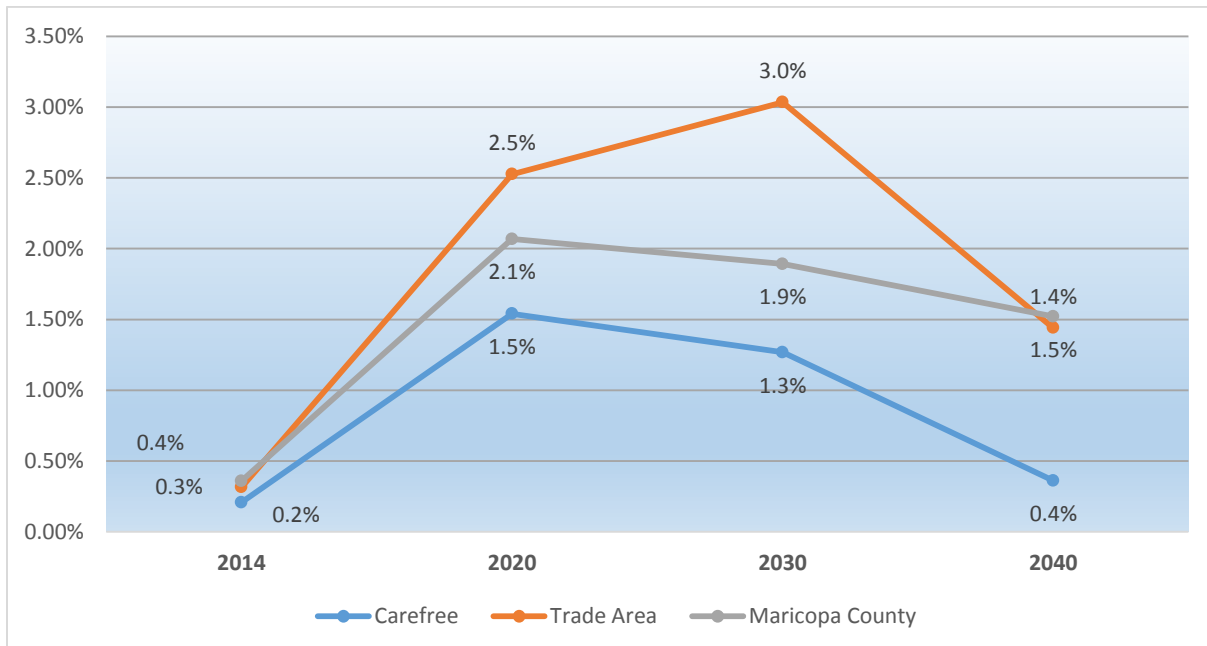
**Table 2 - Population and Projections, 2010-2040**

	2010	2014	2020	2030	2040	% Change 2010-2040
Carefree	3,353	3,451	3,770	4,248	4,402	28%
Market Trade Area	78,673	82,150	94,600	123,303	141,077	72%
Maricopa County	3,817,117	4,009,412	4,506,946	5,359,497	6,174,940	54%

Source: MAG, U.S. Census

When looking at the compounded annual growth rate in Figure 4, Carefree and Maricopa County show a steady decline in the rate of population growth beginning in 2020, while the Market Trade Area continues to increase through 2030, but thereafter begins to experience a rapid decline.

**Figure 4 - Compounded Annual Growth Rate, 2014-2040**



Source: MAG



The household size for the Town of Carefree remains constant at 1.4 people, while the Market Trade Area shows a slight increase by 2040. By comparison, the countywide average household size is 2.7 people.

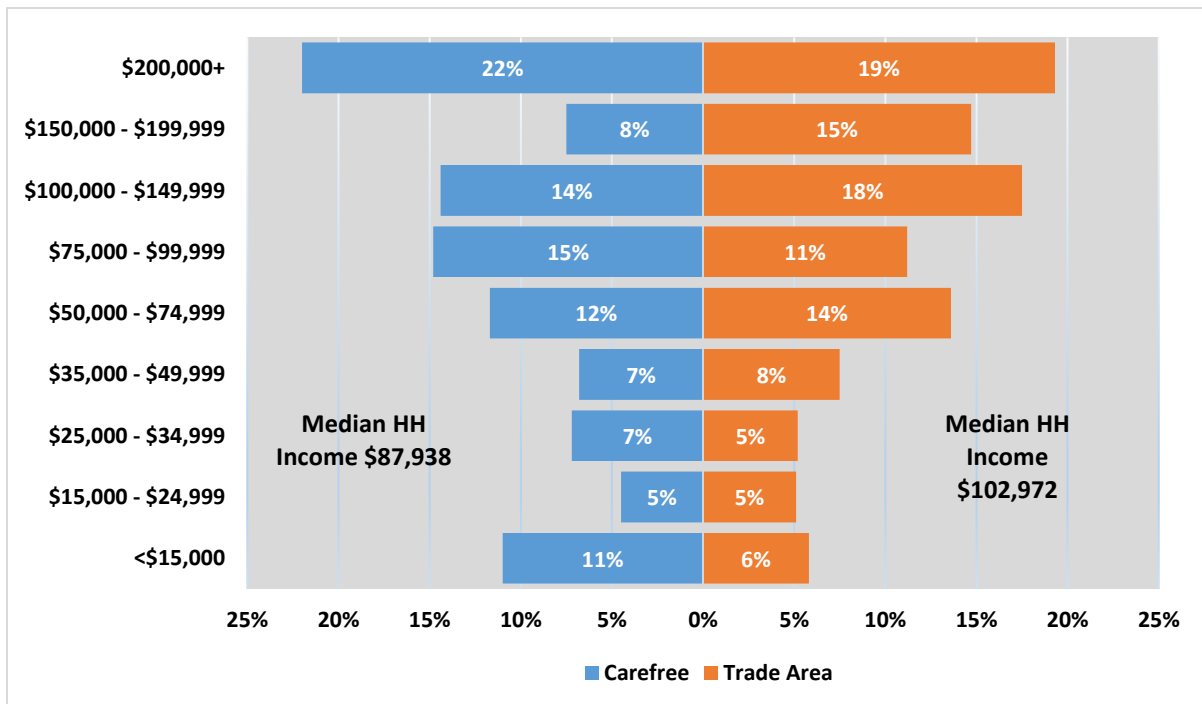
Table 3 - Households and Projections, 2010-2040					
	2010	2014	2020	2030	2040
Carefree	1,651	1,696	1,839	2,077	2,146
Average Household Size	2.00	2.00	2.01	1.98	1.97
Market Trade Area	32,336	33,819	39,196	51,372	58,774
Average Household Size	2.43	2.42	2.41	2.39	2.39
Maricopa County	1,411,590	1,459,136	2,312,650	1,968,799	2,265,740
Average Household Size	2.7	2.7	2.7	2.7	2.7

Note: Maricopa County data for 2013 from AGS  
 Source: MAG, AGS

### Income

When considering the spending power of Carefree and residents in the Market Trade Area, it is apparent that this portion of Metro Phoenix is very affluent. Carefree residents have a median household income of \$87,938 and the Market Trade Area residents boast an income of \$102,972. The median household income for all of Maricopa County is \$54,385.

Figure 5 - Median Household Income, 2014



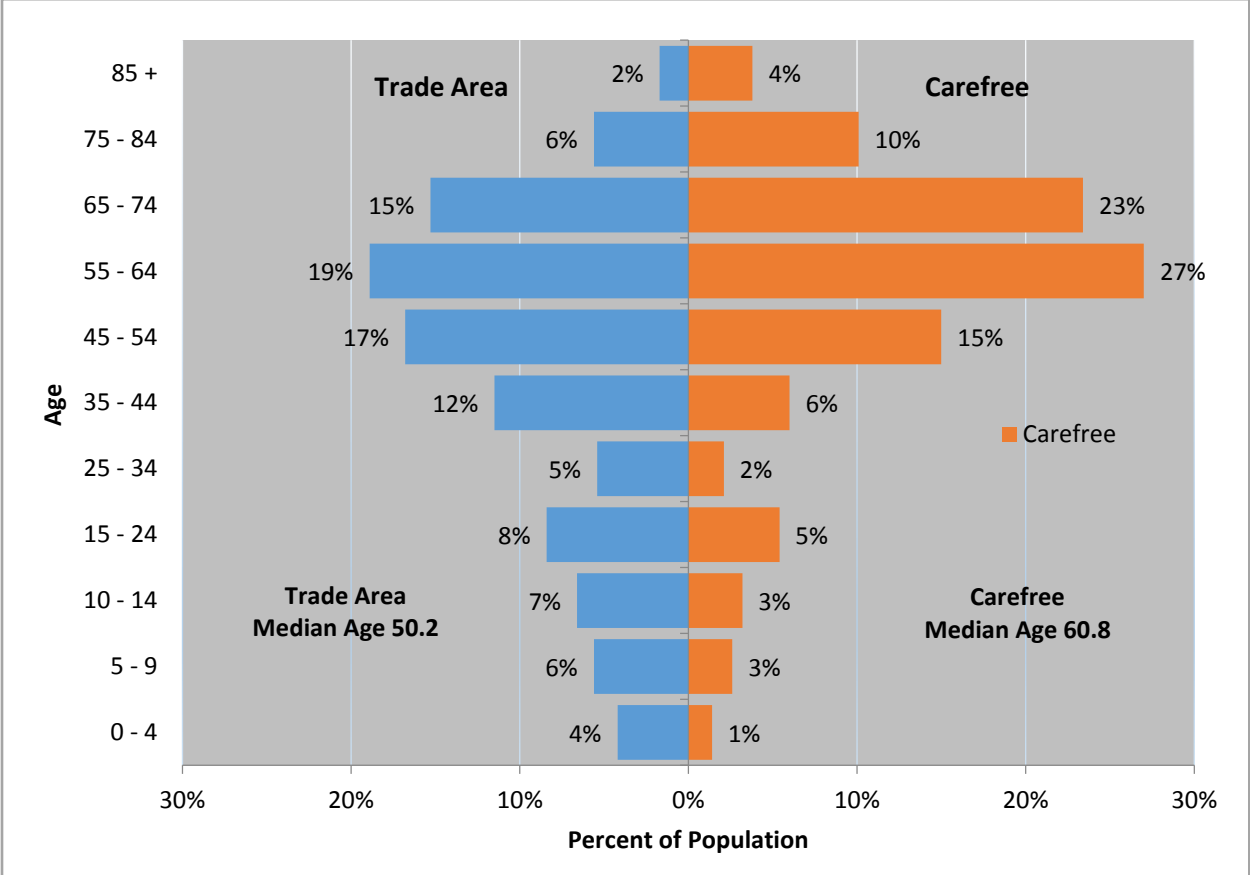
Source: Esri



### Age

When examining the age distribution displayed in Figure 6, the Market Trade Area has a larger percentage of children, young adults and people between the ages of 35 and 54 than Carefree, while Carefree has a greater percentage of people over the age of 55. This is evident in the median age of Carefree residents at 60.8 compared to the Market Trade Area at 50.2.

Figure 6 - Age Distribution, Carefree and Market Trade Area, 2014



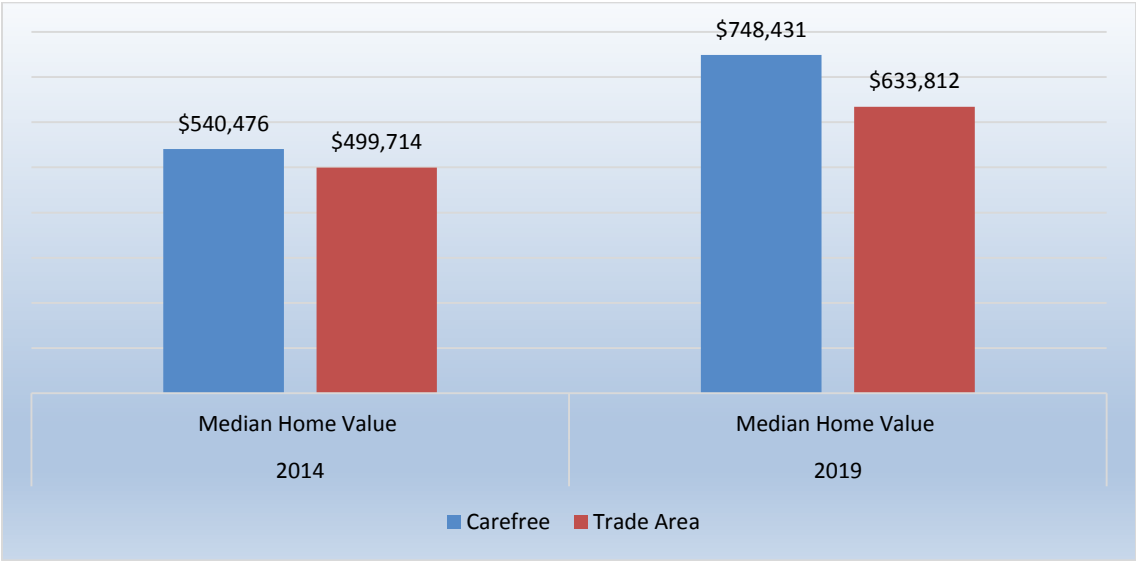
Source: Esri

### Housing

The median home values in Carefree are projected to increase from \$540,476 in 2014 to \$748,431 in 2019 noted in Figure 7. The Trade Area has a higher percentage of owner occupied units at 69.1 percent compared to Carefree at 63.5 percent. Carefree has a higher percentage of housing that is vacant, which is primarily due to the seasonality of some residents (Figure 8).

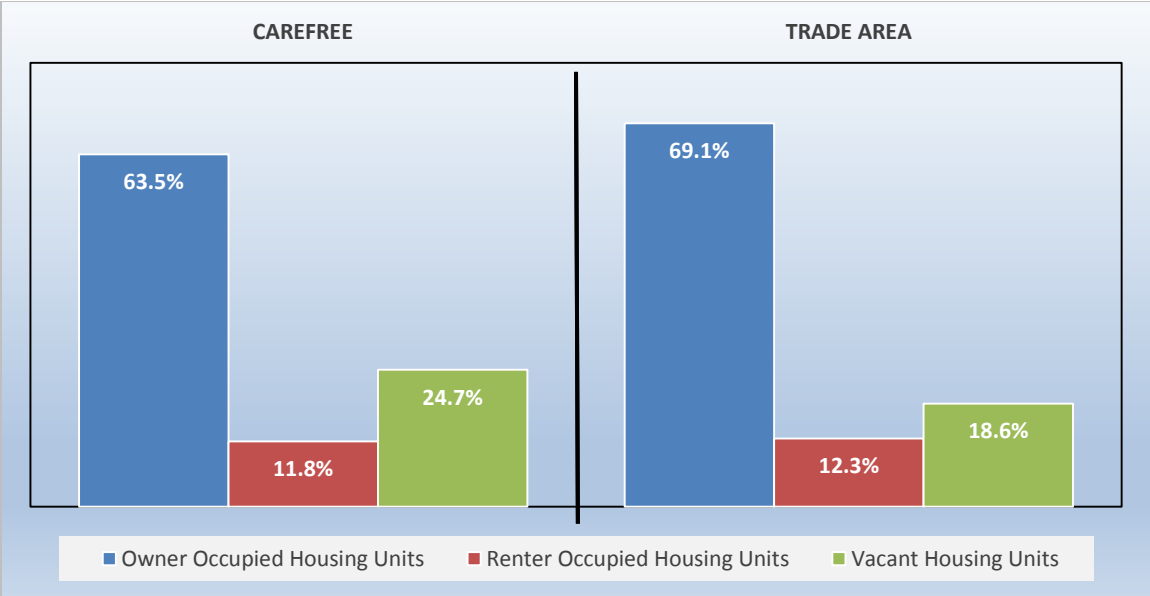


Figure 7 - Median Home Values, Carefree and Market Trade Area



Source: Esri

Figure 8 - Housing Occupancy, Carefree and Market Trade Area, 2014



Source: Esri

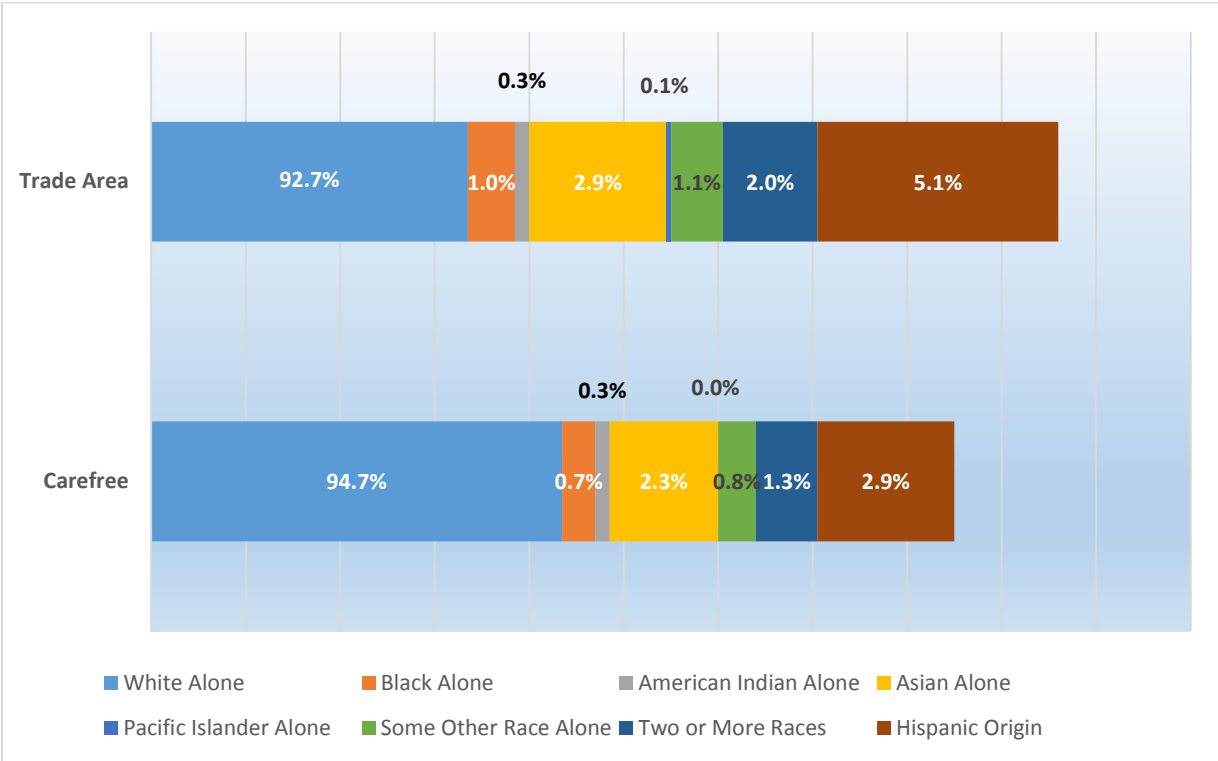
### Race and Ethnicity

The largely white population in Carefree and the Market Trade area is projected to experience a small decrease between 2014 and 2019; while the amount of people who identify themselves as being Hispanic is projected to increase slightly over the same timeframe. As seen in Figure 9, the Trade Area contains the largest share of Hispanic individuals as a percent of the total population at 5.1 percent, in contrast to Carefree at 2.9 percent.





Figure 9 - Race and Ethnicity, Carefree and Market Trade Area, 2014



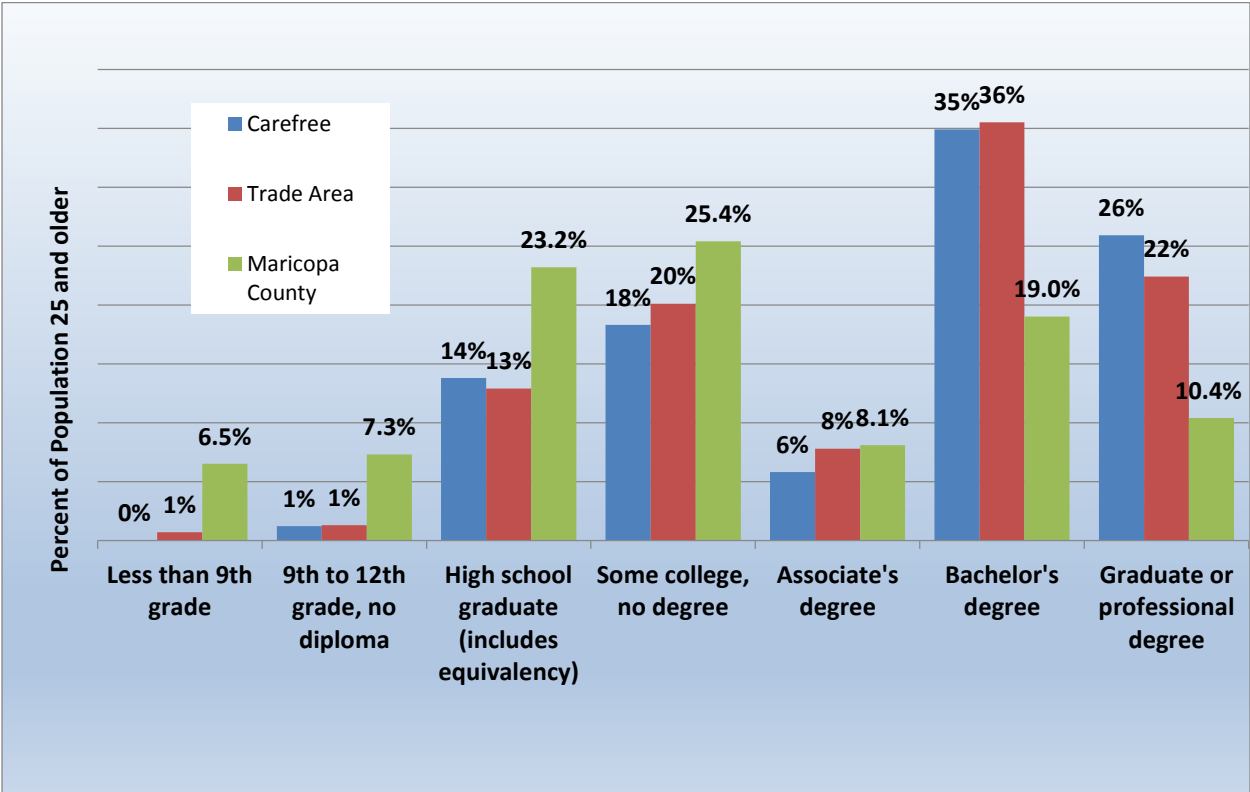
Source: Esri

### Educational Attainment

Educational attainment is another indicator of socio-economic status of a population. With advancing educational attainment comes an increase in disposable income. Both Carefree and the Trade Area substantially exceed Maricopa County in higher educational attainment, with nearly 61 percent of the population in Carefree possessing a Bachelor’s or Graduate degree and 58 percent in the Trade Area. This is double that of the county at 29 percent.



Figure 10 - Educational Attainment, 2014



Source: Esri

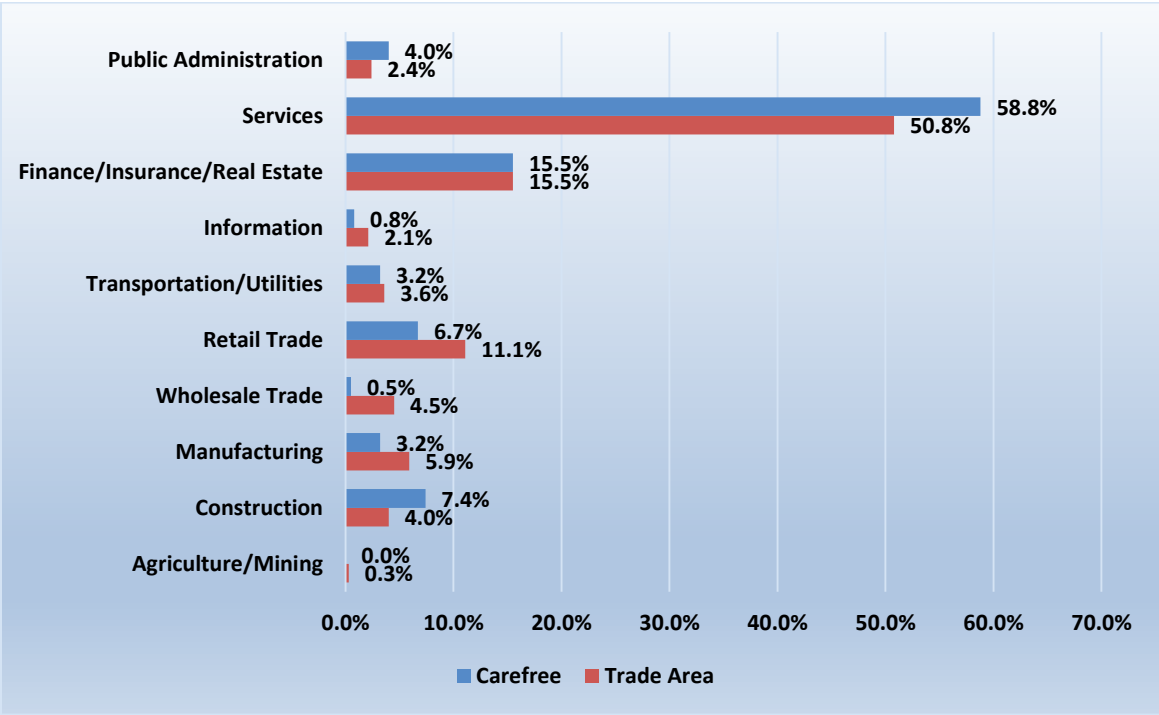
### Employment

The vast majority of residents in Carefree and the larger trade area are employed within the services sector, which includes professional services, healthcare, and entertainment industries. This is followed by finance, insurance and real estate, which employs 15.5 percent of all residents. According to the U.S. Census there are 1,491 Carefree residents over the age of 16 employed in civilian jobs.

In terms of occupations within these industry sectors, nearly 86 percent of Carefree residents are employed in white collar jobs within management, business, financial, professional services, and sales. This is also the case with residents within the Trade Area. Blue collar occupations within Carefree comprise 14 percent of all occupations, which includes construction, manufacturing, agriculture and mining.

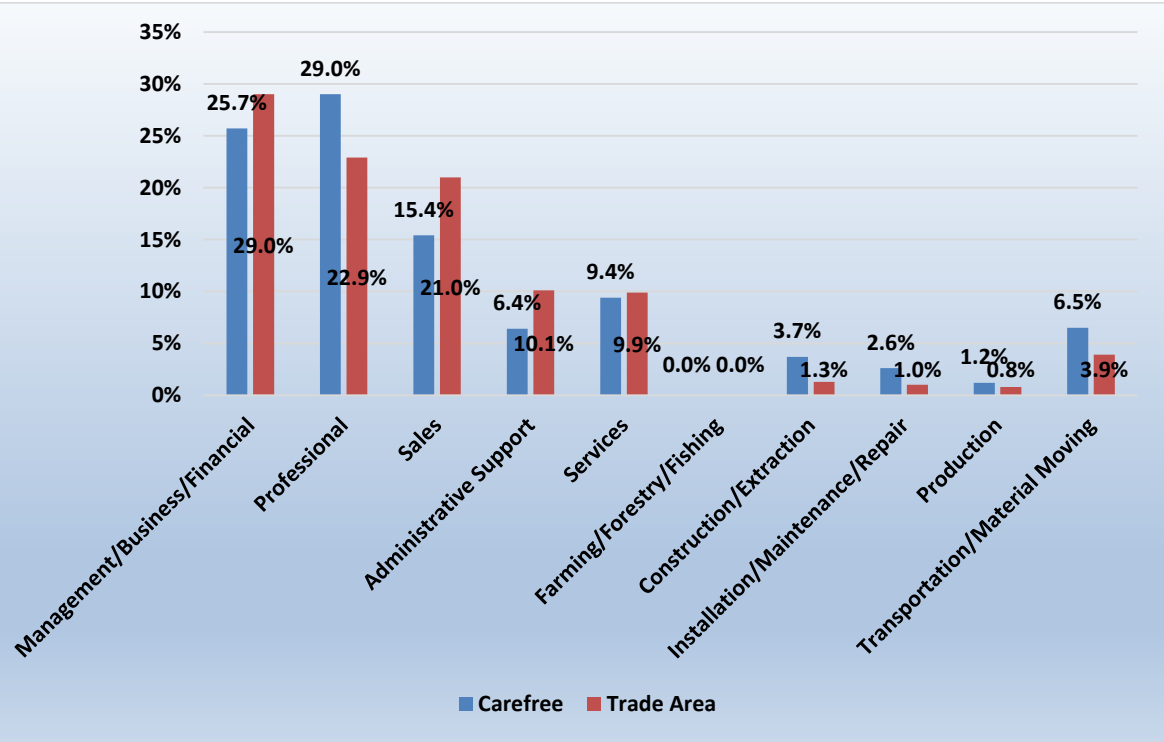


Figure 11 - Employment by Industry, Carefree and Trade Area, 2014



Source: Esri

Figure 12 - Occupation of Employed People 16 years and Older, 2014



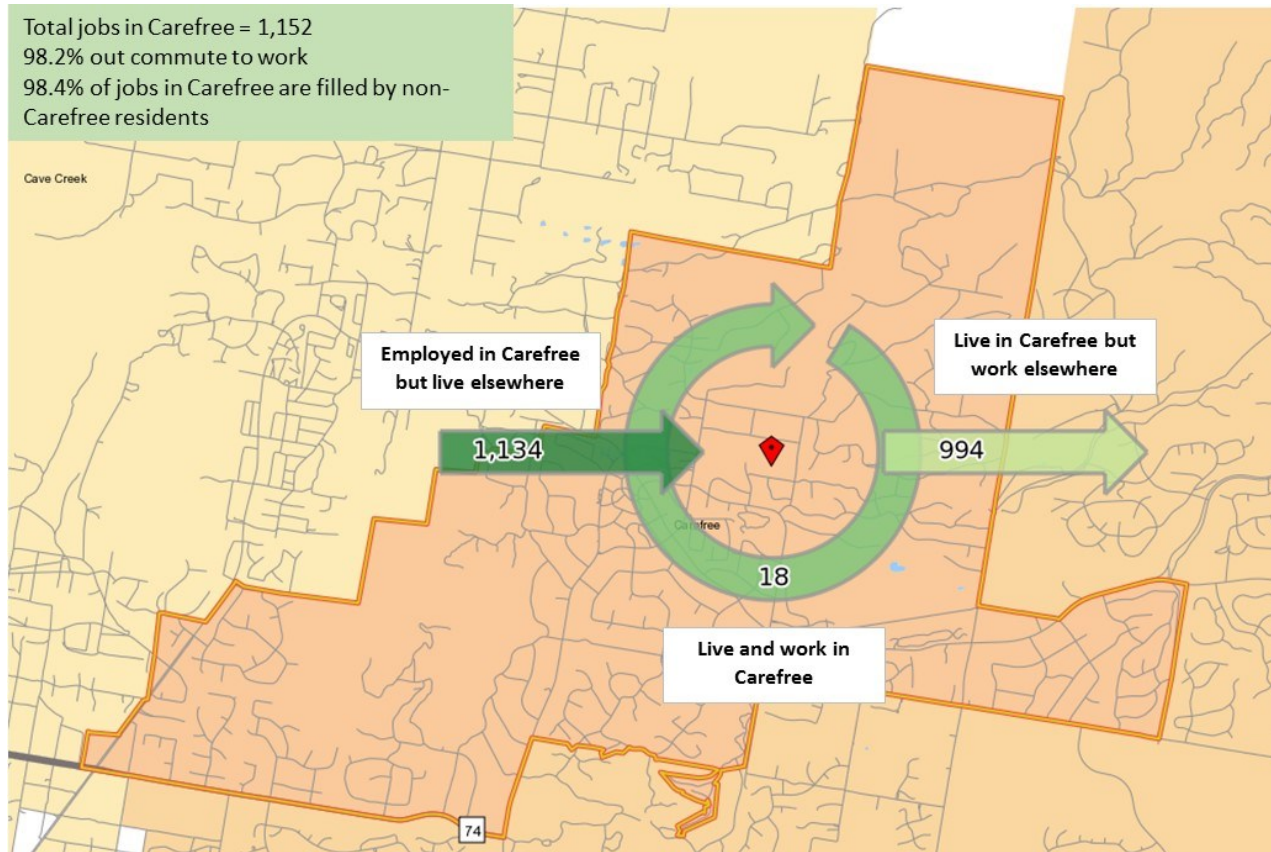
Source: Esri



## Worker Inflow/Outflow

On a workday basis, the Town of Carefree experiences a substantial worker out migration to jobs in other cities throughout the region, including as far away as Tucson. In 2011 the workforce living in Carefree totaled 1,0121 people, of which 994 or 98.2 percent out-commuted to work. Conversely, there were 1,134 jobs in Carefree that were filled by residents from other valley cities. There were only 18 people that both lived and worked in Carefree (Figure 13).

**Figure 13 - Carefree Worker Inflow and Outflow**



Source: U.S. Census

Carefree imports 98.4 percent of its workforce (1,134) from other cities to fill the demand by area employers. As noted in Table 4, most of the in-commuters come from Phoenix (37.6%) followed by Scottsdale (13.8%). Only 1.6 percent of the workforce both live and work in Carefree.

<sup>1</sup> This figure comes from US Census LEHD Origin-Destination Employment Statistics, which will not match the figure provided in the Esri 2014 Employment by Industry data.



Table 4 - Carefree Location of Employment/ Residence, 2011

	Out Commuter's Workplace		In Commuter's Residence	
	Count	Percent	Count	Percent
Phoenix	336	33.2%	433	37.6%
Scottsdale	142	14.0%	159	13.8%
Tucson	77	7.6%		--
Tempe	42	4.2%		--
Mesa	38	3.8%	40	3.5%
Chandler	33	3.3%		--
Glendale	24	2.4%	41	3.6%
<b>Carefree</b>	<b>18</b>	<b>1.8%</b>	<b>18</b>	<b>1.6%</b>
Gilbert	18	1.8%		--
Flagstaff	16	1.6%		--
Peoria	0	--	41	3.6%
Anthem	0	--	35	3.0%
Cave Creek	0	--	34	3.0%
New River	0	--	29	2.5%
Avondale	0	--	18	1.6%
All Other Locations	268	26.5%	304	26.4%
<b>Totals</b>	<b>1,012</b>	<b>100.0%</b>	<b>1,152</b>	<b>100.0%</b>

Source: U.S. Census Bureau, OnTheMap Application and LEHD Origin-Destination Employment Statistics Beginning of Quarter Employment, 2nd Quarter of 2002-2011

Table 5 shows that Carefree is exporting a large percentage of highly skilled workers in the industries of healthcare, educational services, administrative support, and finance and insurance; while importing workers to fill jobs mostly in accommodations and food services and construction. Carefree imports nearly as many jobs in retail trade as it exports.

An examination of the earnings shows that the jobs which Carefree imports workers to fill are lower wage earning jobs with 26.7 percent earning more than \$3,333 a month compared to Carefree residents at 43.7 percent. Also important to know is worker educational attainment. Carefree residents hold a greater percentage of Bachelor's and Advanced Degrees than employees that come to Carefree to work.

The workers who come to Carefree represent a potential customer base for existing and future retail and restaurants. While the numbers may be small, they still augment the size of the potential market for business retention and attraction purposes.



Table 5 - Carefree Employment and Workforce Statistics, 2011

	Working in Carefree		Living in Carefree	
	Count	Percent	Count	Percent
<b>Total All Jobs</b>	1,152	100%	1,012	100%
<b>Jobs by Worker Age</b>				
Age 29 or younger	242	21.0%	215	21.2%
Age 30 to 54	599	52.0%	533	52.7%
Age 55 or older	311	27.0%	264	26.1%
<b>Jobs by Earnings</b>				
\$1,250 per month or less	401	34.8%	259	25.6%
\$1,251 to \$3,333 per month	443	38.5%	311	30.7%
More than \$3,333 per month	308	26.7%	442	43.7%
<b>Jobs by NAICS Industry Sector</b>				
Agriculture, Forestry, Fishing and Hunting	1	0.1%	20	2.0%
Mining, Quarrying, and Oil and Gas Extraction	1	0.1%	1	0.1%
Utilities	5	0.4%	3	0.3%
Construction	97	8.4%	50	4.9%
Manufacturing	16	1.4%	45	4.4%
Wholesale Trade	44	3.8%	62	6.1%
Retail Trade	185	16.1%	155	15.3%
Transportation and Warehousing	19	1.6%	41	4.1%
Information	11	1.0%	23	2.3%
Finance and Insurance	48	4.2%	70	6.9%
Real Estate and Rental and Leasing	45	3.9%	16	1.6%
Professional, Scientific, and Technical Services	100	8.7%	78	7.7%
Management of Companies and Enterprises	0	0.0%	10	1.0%
Administration & Support, Waste Management and Remediation	63	5.5%	88	8.7%
Educational Services	22	1.9%	69	6.8%
Health Care and Social Assistance	85	7.4%	105	10.4%
Arts, Entertainment, and Recreation	37	3.2%	32	3.2%
Accommodation and Food Services	311	27.0%	93	9.2%
Other Services (excluding Public Administration)	37	3.2%	23	2.3%
Public Administration	25	2.2%	28	2.8%
<b>Jobs by Worker Race</b>				
White Alone	1,083	94.0%	939	92.8%
Black or African American Alone	23	2.0%	25	2.5%
American Indian or Alaska Native Alone	15	1.3%	15	1.5%
Asian Alone	16	1.4%	20	2.0%
Native Hawaiian or Other Pacific Islander Alone	2	0.2%	0	0.0%
Two or More Race Groups	13	1.1%	13	1.3%
<b>Jobs by Worker Ethnicity</b>				
Not Hispanic or Latino	975	84.6%	864	85.4%
Hispanic or Latino	177	15.4%	148	14.6%
<b>Jobs by Worker Educational Attainment</b>				
Less than high school	119	10.3%	85	8.4%
High school or equivalent, no college	228	19.8%	185	18.3%
Some college or Associate degree	308	26.7%	244	24.1%
Bachelor's degree or advanced degree	255	22.1%	283	28.0%
Educational attainment not available (workers aged 29 or younger)	242	21.0%	215	21.2%
<b>Jobs by Worker Sex</b>				
Male	595	51.6%	568	56.1%
Female	557	48.4%	444	43.9%

Source: U.S. Census Bureau, OnTheMap Application and LEHD Origin-Destination Employment Statistics



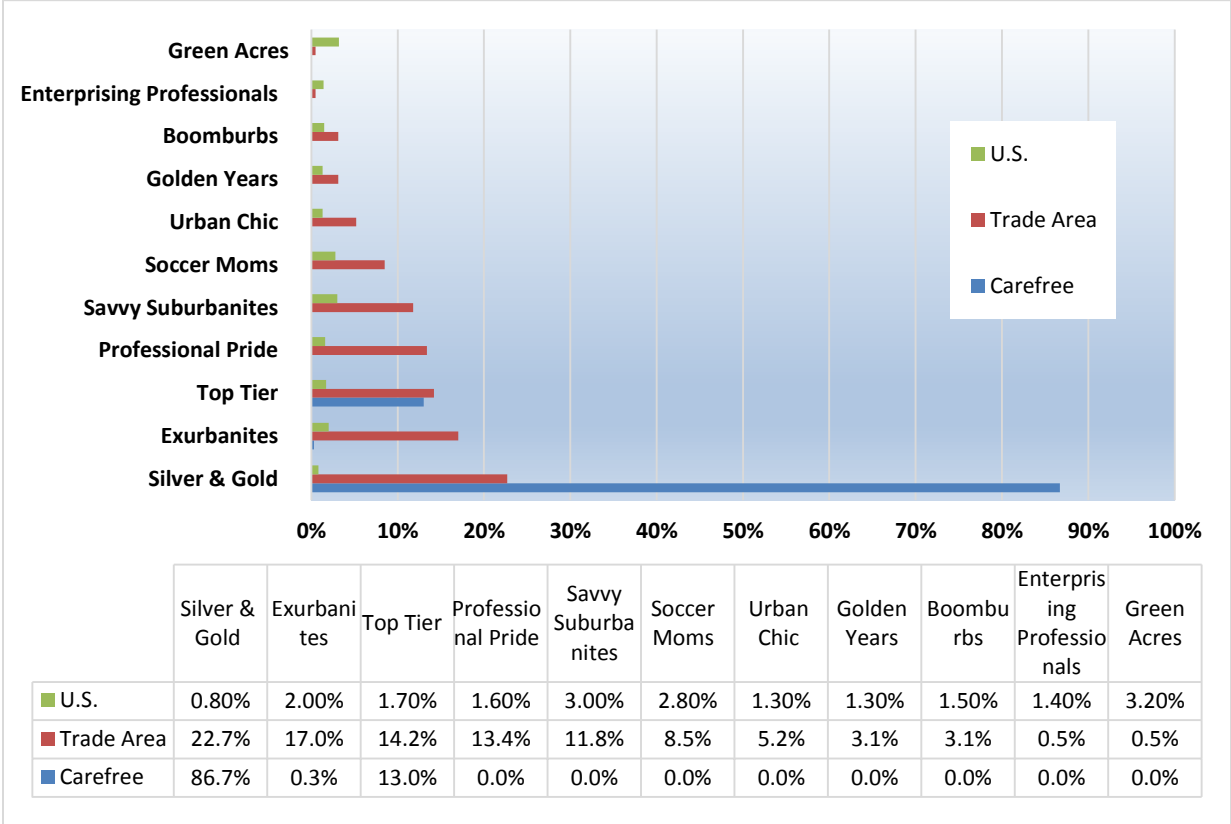
## TAPESTRY SEGMENTATION

Segmentation systems operate on the theory that people with similar tastes, lifestyles, and behaviors seek others with the same tastes—“like seeks like.” These behaviors can be measured, predicted, and targeted. Esri’s Tapestry Segmentation system combines the “who” of lifestyle demography with the “where” of local neighborhood geography to create a model of various lifestyle classifications or segments of actual neighborhoods with addresses—distinct behavioral market segments.

The Tapestry Segmentation system has 67 classifications of US neighborhoods based on their socioeconomic and demographic compositions. The system provides a picture of US neighborhoods based on proven segmentation methodology and socioeconomic and demographic characteristics. Customer profiles created with segmentation can help find the best location for new stores, study differences in population segments and direct advertising with the right message to the right audience.

The Town of Carefree and the Market Trade Area have some distinct differences in the lifestyle segmentation concentrations, as pictured in Figure 14. Most notably is the majority concentration of Silver & Gold segment in Carefree with 87 percent of the households, compared to the Trade Area at 23 percent and the US with less than 1 percent. The Trade Area has a more diverse mix of consumers with 11 segments compared to Carefree with 3 segments.

Figure 14 - Tapestry Segmentation, Carefree, Market Trade Area and U.S.



Source: Esri



The following table provides a market profile each Tapestry segment for Carefree and the Trade Area. Full descriptions of each segment is included in Appendix A. This information, combined with the consumer survey results and trade leakage analysis should be helpful to the Town in targeting the appropriate mix of retail, restaurants, entertainment and services.

<b>Table 6 - Tapestry Segmentation Market Profiles</b>			
<b>Tapestry Segmentation</b>	<b>Market Profile</b>	<b>Carefree %</b>	<b>Trade Area %</b>
<b>Silver &amp; Gold</b>	<ul style="list-style-type: none"> <li>• Median age is 61.8 with a median household income of \$63,000; 83.8% own their home and 16.2% rent</li> <li>• This is the most affluent senior market segment and is growing</li> <li>• Partial to luxury cars or SUVs; highest demand market for convertibles.</li> <li>• Active seniors that maintain a regular exercise regimen and pay attention to healthier eating habits.</li> <li>• Pursue the luxuries that well-funded retirement affords: an active social life, travel, hobbies, and sports (especially golf and boating) and liberal use of home maintenance services to minimize chores.</li> <li>• Avid readers of newspapers, magazines (sports and travel), and books (audio, e-readers, or tablets).</li> <li>• Generous supporters of charitable organizations.</li> </ul>	86.7%	22.7%
<b>Exurbanites</b>	<ul style="list-style-type: none"> <li>• Median age is 49.6 with a median household income of \$98,000; 85.4% own their home and 14.6% rent</li> <li>• Median age is 49.6 with an average household size of 2.48.</li> <li>• These residents are active in their community, generous with donations, support the arts and are seasoned travelers</li> <li>• Well connected and use the internet for everything from shopping to managing their finances</li> <li>• Sociable and hardworking, and still find the time to stay in shape</li> <li>• Exurbanites residents' preferred vehicles are late model luxury cars or SUVs.</li> <li>• They are active supporters of the arts and public television/radio.</li> <li>• Attentive to ingredients, they prefer natural or organic products.</li> <li>• Gardening and home improvement are priorities, but they also use a number of services, from home care and maintenance to personal care.</li> <li>• Financially active with wide-ranging investments, these investors rely on financial planners, extensive reading, and the Internet to handle their money.</li> </ul>	0.3%	17.0%





Tapestry Segmentation	Market Profile	Carefree %	Trade Area %
<b>Top Tier</b>	<ul style="list-style-type: none"> <li>• Median age is 46.2 with a median household income of \$157,000; 90.5% own their home and 9.5% rent</li> <li>• They purchase or lease luxury cars with the latest trim, preferably imports.</li> <li>• They contribute to arts/cultural organizations, educational and social groups, as well as NPR and PBS.</li> <li>• Top Tier residents farm out their household chores—every service from property and garden maintenance and professional housekeeping to contracting for home improvement or maintenance projects.</li> <li>• Consumers spend money on themselves; they frequently visit day spas and salons, use dry cleaning services, and exercise at exclusive clubs.</li> <li>• When at home, their schedules are packed with lunch dates, book club meetings, charity dinners, classical music concerts, opera shows, and visits to local art galleries.</li> <li>• Top Tier consumers are shoppers. They shop at high-end retailers such as Nordstrom (readily paying full price), as well as Target, Kohl’s, Macy’s, and Bed Bath &amp; Beyond, and online at Amazon.com.</li> <li>• They make several domestic and foreign trips a year for leisure and pay for every luxury along the way—a room with a view, limousines, and rental cars are part of the package.</li> </ul>	13.0%	14.2%
<b>Professional Pride</b>	<ul style="list-style-type: none"> <li>• Median age is 40.5 with a median household income of \$127,000; 92% own their home and 8% rent</li> <li>• These frequent travelers take several domestic trips a year, preferring to book their plane tickets, accommodations, and rental cars via the Internet.</li> <li>• Residents take pride in their picture-perfect homes, which they continually upgrade. They shop at Home Depot and Bed Bath &amp; Beyond to tackle the smaller home improvement and remodeling tasks but contract out the larger projects.</li> <li>• To keep up with their busy households, they hire housekeepers or professional cleaners.</li> <li>• 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.</li> <li>• 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.</li> <li>• 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.</li> <li>• 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.</li> </ul>	0%	13.4%



Tapestry Segmentation	Market Profile	Carefree %	Trade Area %
<b>Savvy Suburbanites</b>	<ul style="list-style-type: none"> <li>• Median age is 44.1 with a median household income of \$104,000; 91% own their home and 9% rent</li> <li>• Residents prefer late model, family-oriented vehicles: SUVs, minivans, and station wagons.</li> <li>• Gardening and home remodeling are priorities, usually DIY. Riding mowers and power tools are popular, although they also hire contractors for the heavy lifting.</li> <li>• There is extensive use of housekeeping and personal care services.</li> <li>• Foodies: They like to cook and prefer natural or organic products.</li> <li>• These investors are financially active, using a number of resources for informed investing. They are not afraid of debt; many households carry first and second mortgages, plus home equity credit lines.</li> <li>• Physically fit, residents actively pursue a number of sports, from skiing to golf, and invest heavily in sports gear and exercise equipment.</li> </ul>	0%	11.8%
<b>Soccer Moms</b>	<ul style="list-style-type: none"> <li>• Median age is 36.6 with a median household income of \$84,000; 85.5% own their home and 14.5% rent</li> <li>• Most households own at least 2 vehicles; the most popular types are minivans and SUVs.</li> <li>• 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.</li> <li>• Outdoor activities and sports are characteristic of life in the suburban periphery, like bicycling, jogging, golfing, boating, and target shooting.</li> <li>• 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.</li> </ul>	0%	8.5%
<b>Urban Chic</b>	<ul style="list-style-type: none"> <li>• Median age is 42.6 with a median household income of \$98,000; 66.6% own their home and 33.3% rent</li> <li>• Shop at Trader Joe’s, Costco, or Whole Foods.</li> <li>• Eat organic foods, drink imported wine, and truly appreciate a good cup of coffee.</li> <li>• Travel extensively (domestically and internationally).</li> <li>• Prefer to drive luxury imports and shop at upscale establishments.</li> <li>• Embrace city life by visiting museums, art galleries, and movie theaters for a night out.</li> <li>• Avid book readers of both digital and audio formats.</li> <li>• Financially shrewd residents that maintain a healthy portfolio of stocks, bonds, and real estate.</li> <li>• In their downtime, enjoy activities such as skiing, yoga, hiking, and tennis.</li> </ul>	0%	5.2%



Tapestry Segmentation	Market Profile	Carefree %	Trade Area %
<b>Golden Years</b>	<ul style="list-style-type: none"> <li>• Median Age is 51 with a median household income of \$61,000; 63.7% own their home and 36.3% rent</li> <li>• Avid readers, they regularly read daily newspapers, particularly the Sunday edition.</li> <li>• They subscribe to cable TV; news and sports programs are popular as well as on-demand movies.</li> <li>• They use professional services to maintain their homes inside and out and minimize their chores.</li> <li>• Leisure time is spent on sports (tennis, golf, boating, and fishing) or simple exercise like walking.</li> <li>• Good health is a priority; they believe in healthy eating, coupled with vitamins and dietary supplements.</li> <li>• Active social lives include travel, especially abroad, plus going to concerts and museums.</li> <li>• Residents maintain actively managed financial portfolios that include a range of instruments such as common stock and certificates of deposit (more than six months).</li> </ul>	0%	3.1%
<b>Boomburbs</b>	<ul style="list-style-type: none"> <li>• Median age is 33.6 with a median household income of \$105,000; 84.5% own their home and 15.5% rent</li> <li>• Boomburbs residents prefer late model imports, primarily SUVs, and also luxury cars and minivans.</li> <li>• This is one of the top markets for the latest in technology, from smartphones to tablets to Internet connectable televisions.</li> <li>• Style matters in the Boomburbs, from personal appearance to their homes. These consumers are still furnishing their new homes and already remodeling.</li> <li>• They like to garden but more often contract for home services.</li> <li>• Physical fitness is a priority, including club memberships and home equipment.</li> <li>• Leisure includes a range of activities from sports (hiking, bicycling, swimming, golf) to visits to theme parks or water parks.</li> <li>• Residents are generous supporters of charitable organizations.</li> </ul>	0%	3.1%
<b>Enterprising Professionals</b>	<ul style="list-style-type: none"> <li>• Median age is 34.8 and median household income is \$77,000; 52.3% own their home and 47.7% rent</li> <li>• Buy digital books for tablet reading, along with magazines and newspapers.</li> <li>• Go on business trips, a major part of work.</li> <li>• Watch movies and TV with video-on-demand and HDTV over a high-speed connection.</li> <li>• Convenience is key—shop at Amazon.com and pick up drugs at the Target pharmacy.</li> <li>• Eat out at The Cheesecake Factory and Chick-fi I-A; drop by Starbucks for coffee.</li> <li>• Leisure activities include gambling, trips to museums and the beach.</li> <li>• Have health insurance and a 401(k) through work.</li> </ul>	0%	0.5%



Tapestry Segmentation	Market Profile	Carefree %	Trade Area %
Green Acres	<ul style="list-style-type: none"> <li>• Median age is 43 with a median household income of \$72,000; 86.7% own their home and 13.3% rent</li> <li>• Purchasing choices reflect Green Acres’ resident’s country life, including a variety of vehicles from trucks and SUVs to ATVs and motorcycles, preferably late model.</li> <li>• Homeowners favor DIY home improvement projects and gardening.</li> <li>• Media of choice are provided by satellite service, radio, and television, also with an emphasis on country and home and garden.</li> <li>• Green Acres residents pursue physical fitness vigorously, from working out on home exercise equipment to playing a variety of sports.</li> <li>• Residents are active in their communities and a variety of social organizations, from fraternal orders to veterans’ clubs.</li> </ul>	0%	0.5%



## IV. CONSUMER SURVEY

As part of the comprehensive Carefree Village master plan a consumer survey was conducted that was designed to accomplish several objectives, including identifying the type of business that would complement Carefree’s commercial district and identifying opportunities that would enhance the city’s quality of life and help meet consumer demands in the region.

An internet based survey was launched through the Town’s COINS system on September 5, 2014 and closed on October 12, 2014. In addition to the COINS system, additional outreach was conducted to civic organizations requesting their assistance to promote the survey. A total of 505 responses were received primarily from residents living in Carefree and other metro Phoenix communities. A few respondents were from out of state.

The survey instrument was subdivided into three topical sections, which included:

1. Shopping location and personal experience
2. Desires of the Respondent for the Carefree Village
3. Information about the Respondent

For certain questions relating to dining, type of restaurant desired, shopping at the Carefree Village, and participation in Carefree events, cross tabulations were conducted for Carefree residents versus non-Carefree residents. Survey findings are presented in a series of charts and in some cases the chart represents total respondents and in other cases there is a comparison between Carefree residents and non-Carefree residents. Full survey results for Carefree are included in Appendix B and for all respondents in Appendix C.

A combination of the size of the market and the number of responses establishes the accuracy of the survey results. The total number of completed surveys (449) was used in calculating the margin of error. This figure is different from the total responses of 505, since not everyone provided their zip code in order to tabulate the number of Carefree residents.

	Trade Area	Carefree
Number of People	82,150	3,451
Completed Surveys	449	283

Confidence Level	Margin of Error	Margin of Error
90%	3.90%	4.70%
95%	4.60%	5.60%
99%	6.10%	7.30%

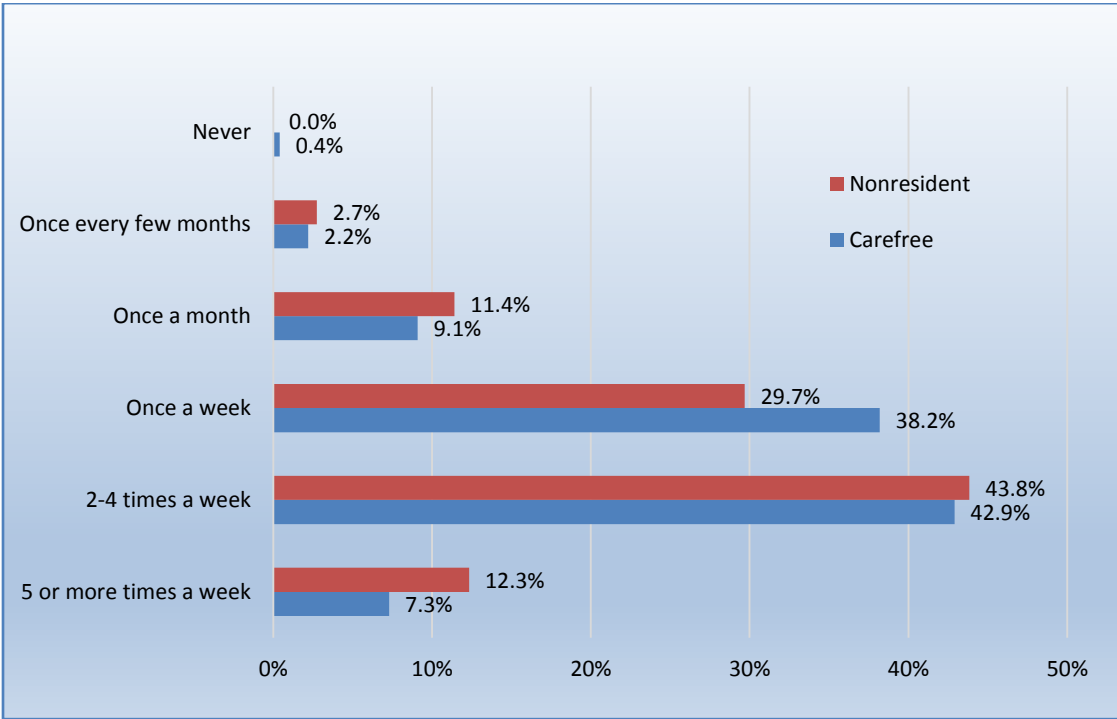
At a 95% level of confidence the margin of error for the Trade Area was 4.6%, as compared to Carefree at 5.6%. This means that if you conducted the survey 100 more times, 95 times out of 100 you would get the same response +/- 4.6%.

Overall, the residents of Carefree have indicated a strong desire for more variety in retail and restaurant offerings within the Carefree Village.



## SHOPPING LOCATION AND EXPERIENCE

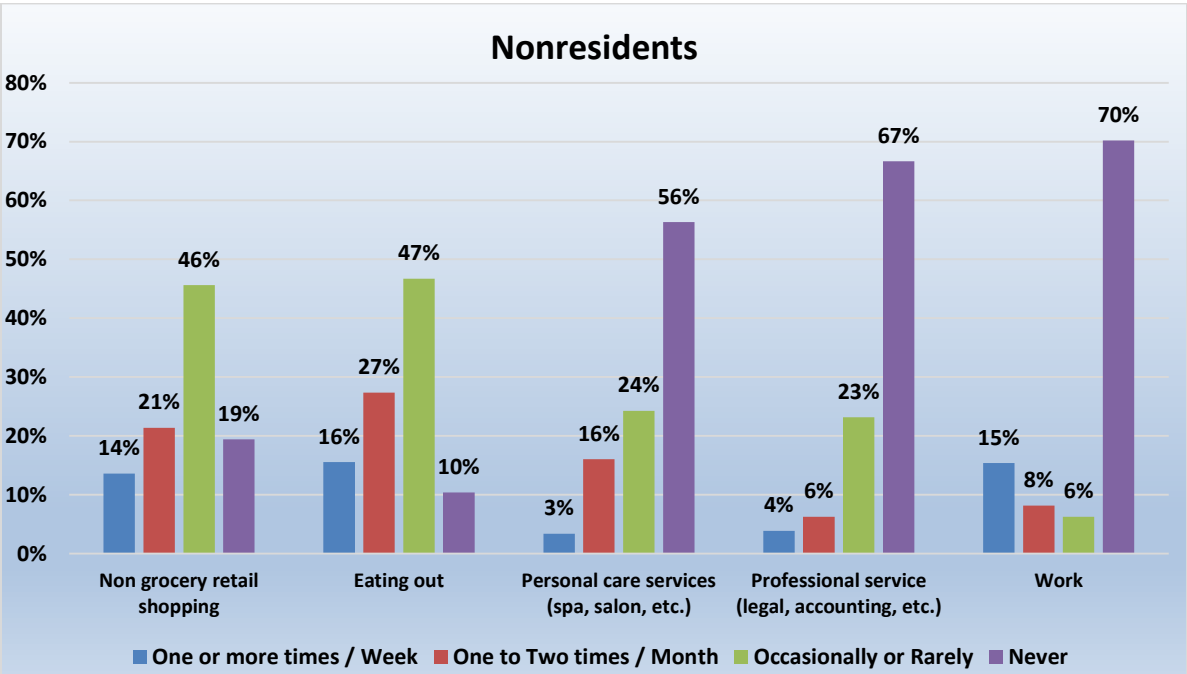
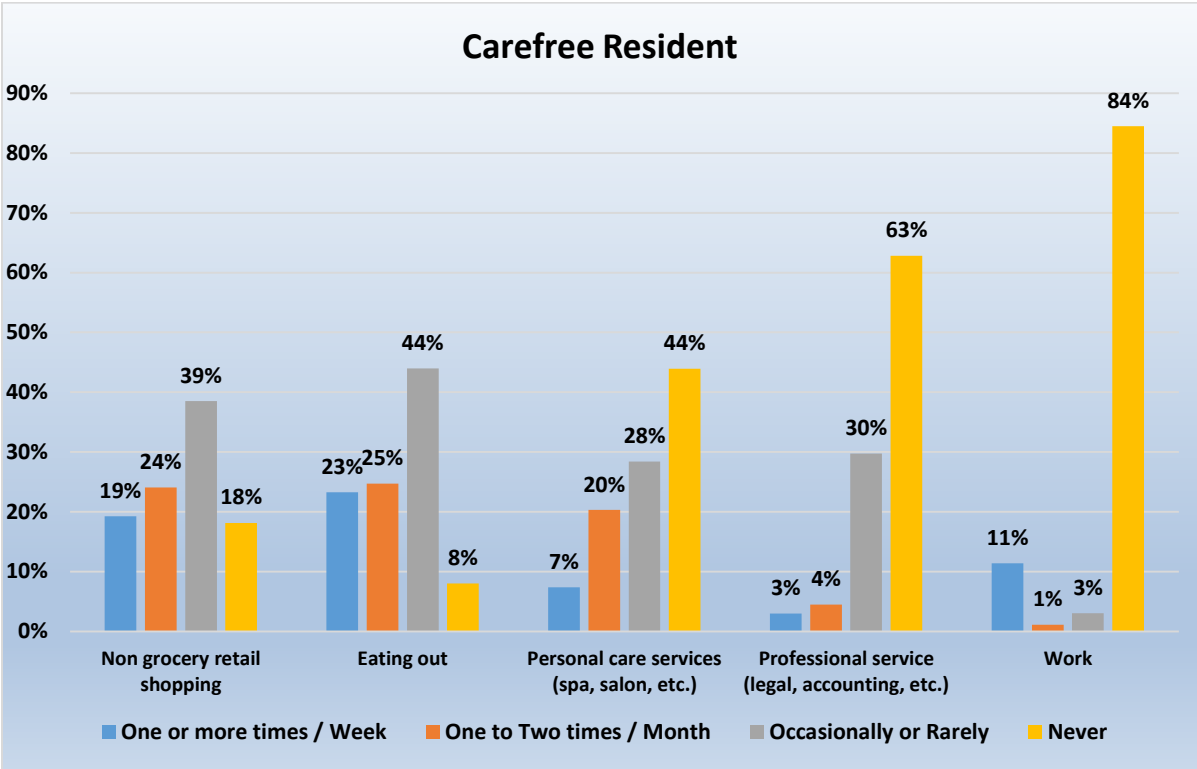
Q1. How often do you eat out?



- There is a larger percentage of Carefree residents (38.2%) that eat out once a week than nonresidents (29.7%).
- 43.8% of nonresidents eat out 2-4 times a week compared to Carefree residents at 42.9%



Q2. How often do you come to Carefree Town Center for the following?



- The primary reason for visiting the Carefree Village for both Carefree residents and nonresidents is for dining followed by non grocery shopping.



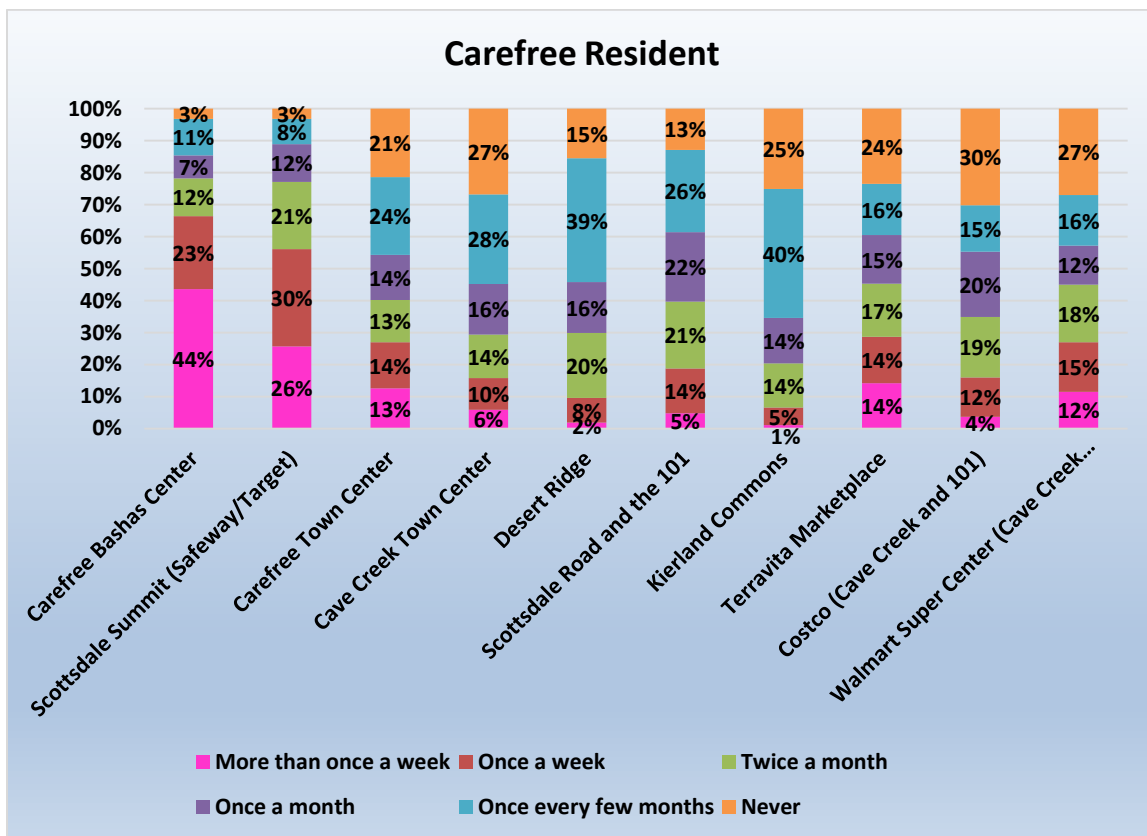
- Carefree residents come to the Village Center for dining at a greater frequency than nonresidents. 23% of Carefree residents versus 16% of nonresidents eat out one or more times per week in the Village Center.
- More nonresidents come to the Village Center for work than Carefree residents, 15% versus 11%.

**Q3. What are the two biggest reasons for you to stop downtown?**

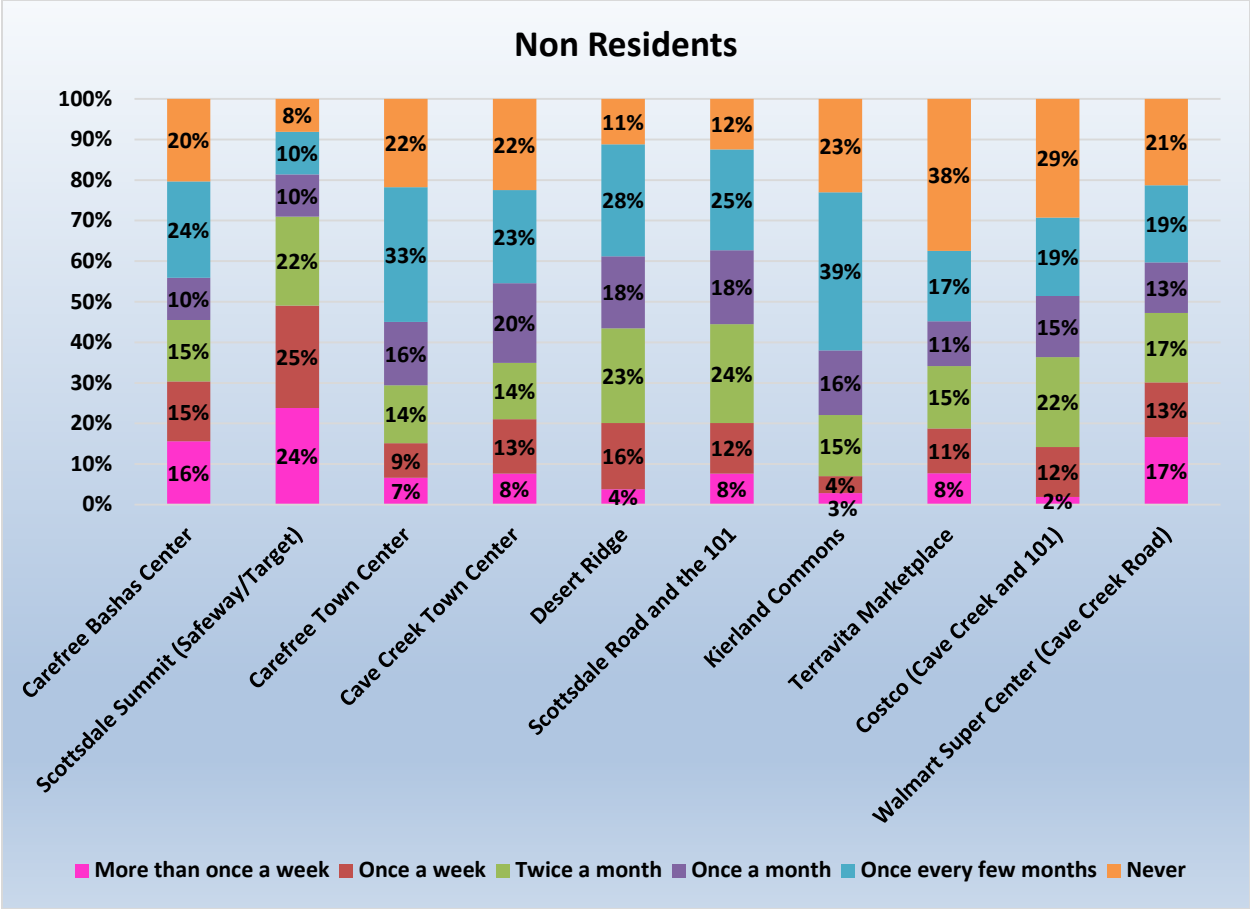
Rank	Carefree Residents	Non-Carefree Residents	Combined Responses
1	Grocery shopping	Dining	Dining
2	Dining/beverages	Festivals, activities and events	Grocery shopping
3	Festivals, activities and events	Shopping	Festivals, activities and events
4	Shopping	Personal/professional services tied with grocery	Shopping
5	Hardware	Hardware	Personal/professional services

- The top two reasons for Carefree residents to visit downtown is for grocery shopping and dining, while non-Carefree residents come for dining and the festivals.

**Q4. How often do you shop at the following locations/stores?**



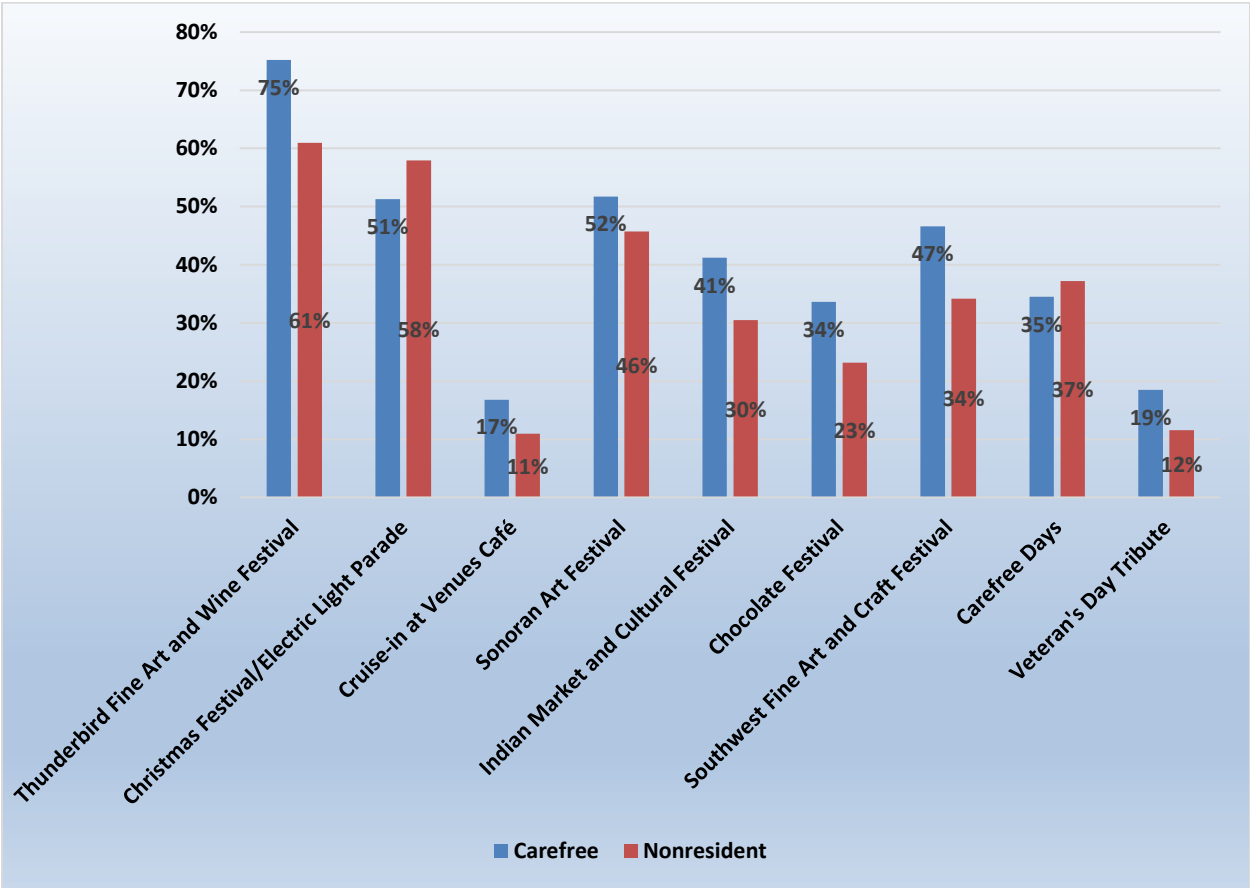




- There are some noticeable differences where Carefree residents and nonresidents go to shop. A combined 67% of Carefree residents shop at the Bhashas Center once a week or more compared to nonresidents at 31%.
- 27% shop at the Carefree Village Center once a week or more, compared to nonresidents at 16%.
- For greater shopping variety both residents and nonresidents shop at Kierland Commons once every few months.



Q5. Which of the following events did you attend in the last 12 months?

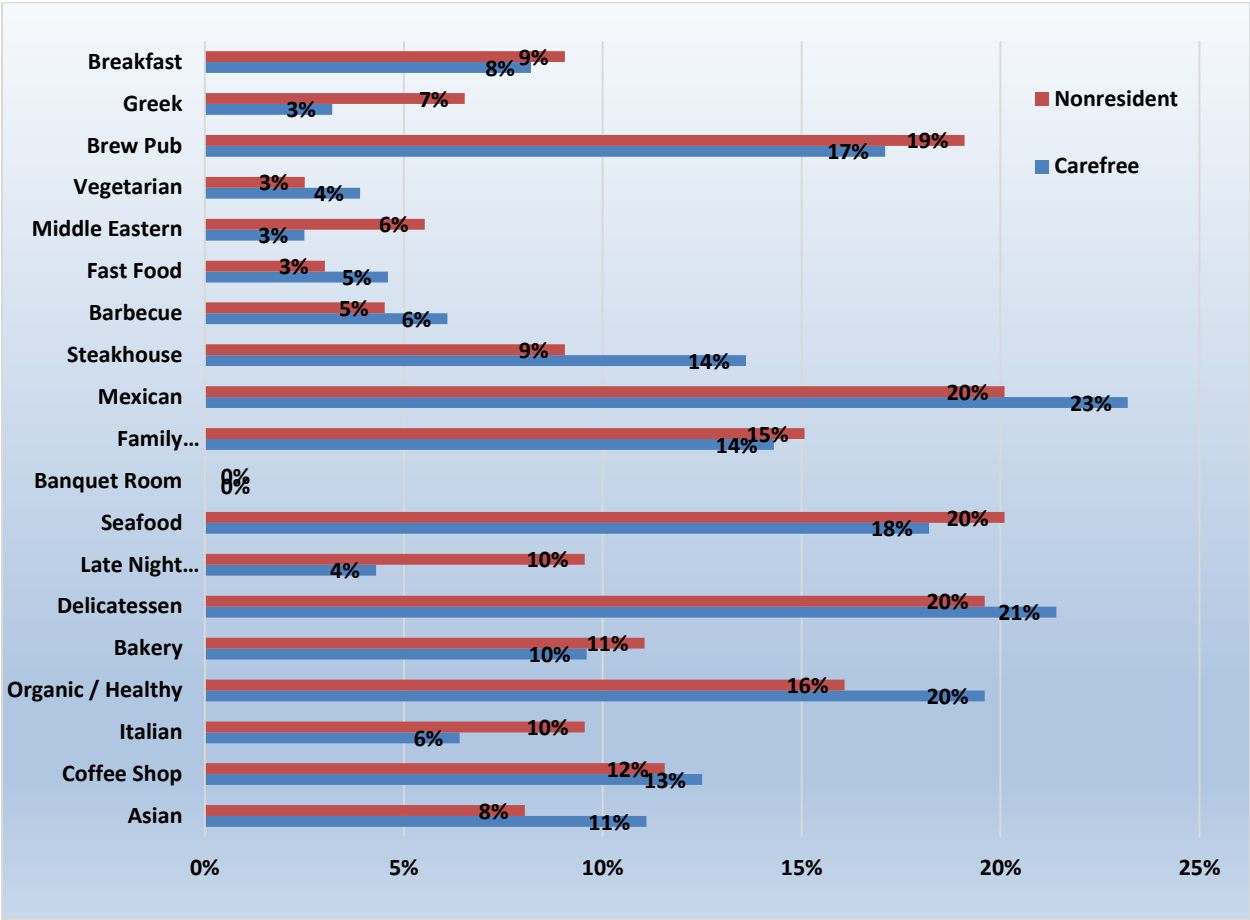


- When comparing the attendance rates of Carefree residents to nonresidents, there is a great deal of similarities in the festivals and activities that respondents attended.
- The vast majority of respondents attended the Thunderbird Fine Art and Wine Festival with 75% of Carefree residents and 61% of nonresidents.
- Nonresidents attended the Christmas Festival at a greater rate than Carefree residents 58% versus 51%.



### WHAT YOU WANT

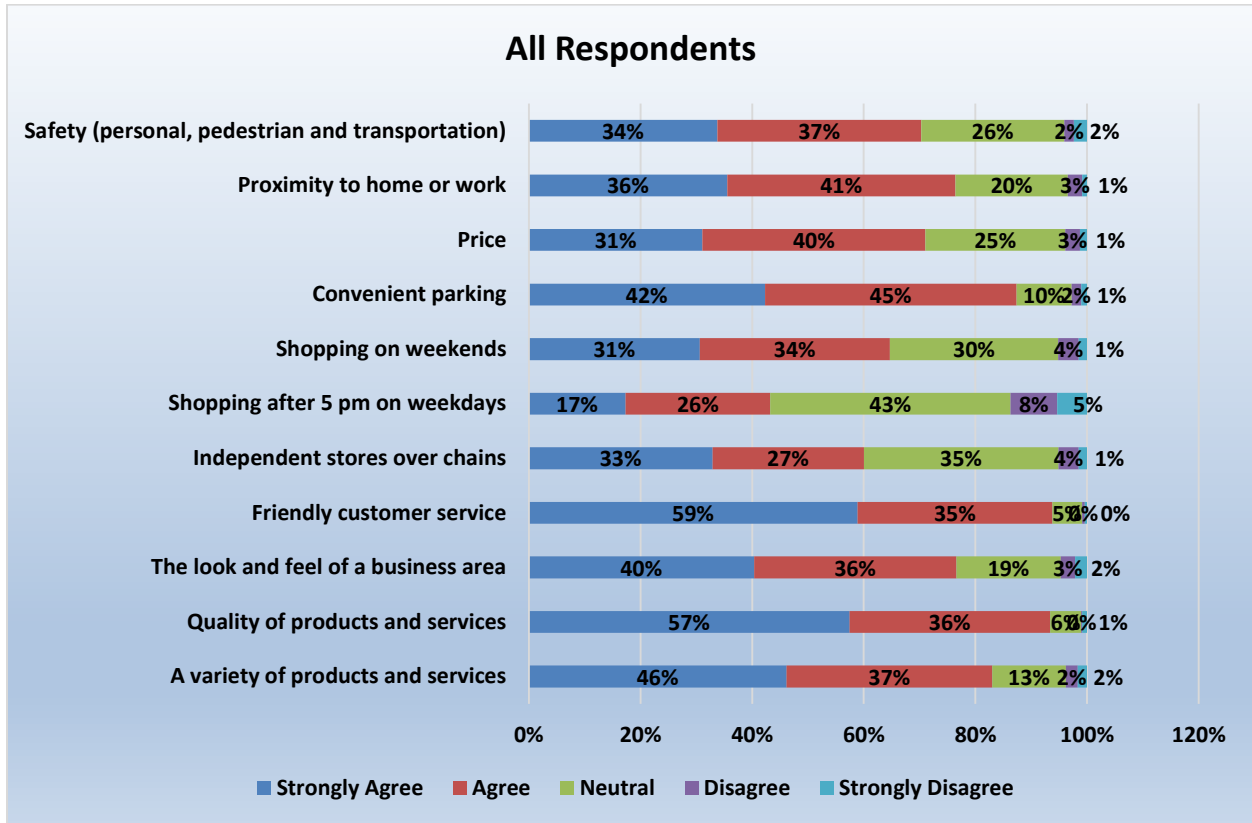
Q6. What TWO TYPES of restaurants would you most like to see in the Carefree Town Center?



- The greatest interest in type of restaurant for all respondents is Mexican food.
- The top choices of restaurants among Carefree residents include Mexican at 23%, delicatessen at 21%, and organic/healthy at 19%.
- Nonresidents desire Mexican, seafood, and delicatessen at 20% each
- Also high on the list with residents and nonresidents is a brew pub.
- There is little interest in fast food, barbeque, Middle Eastern, or Greek cuisine.



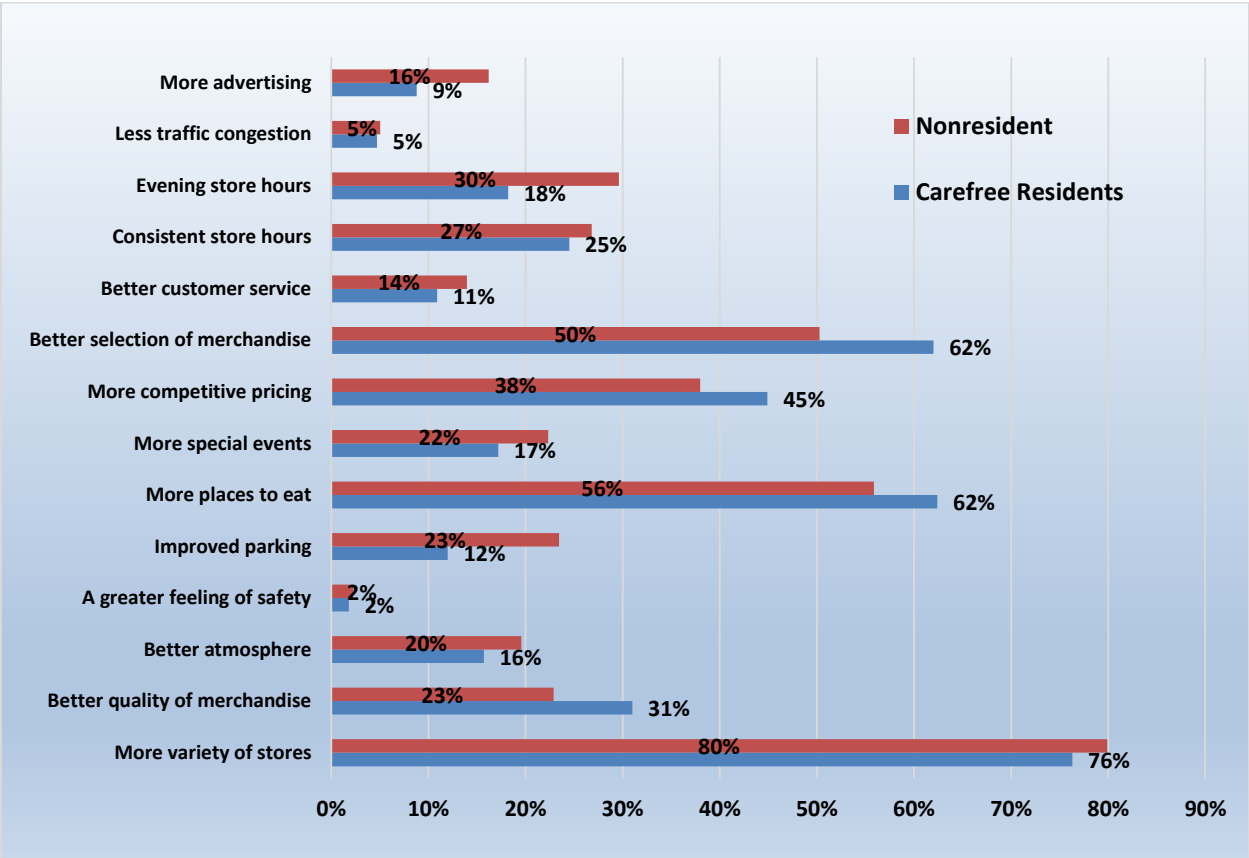
**Q7. What of the following attracts you to a shopping/business area?**



- The two most important features that attract shoppers are friendly customer service (59%) and quality of products and services (57%).
- Also of noted importance is the draw of convenient parking with a combined score of 87% of people who agree or strongly agree, and a variety of products and services with a combined score of 83%.



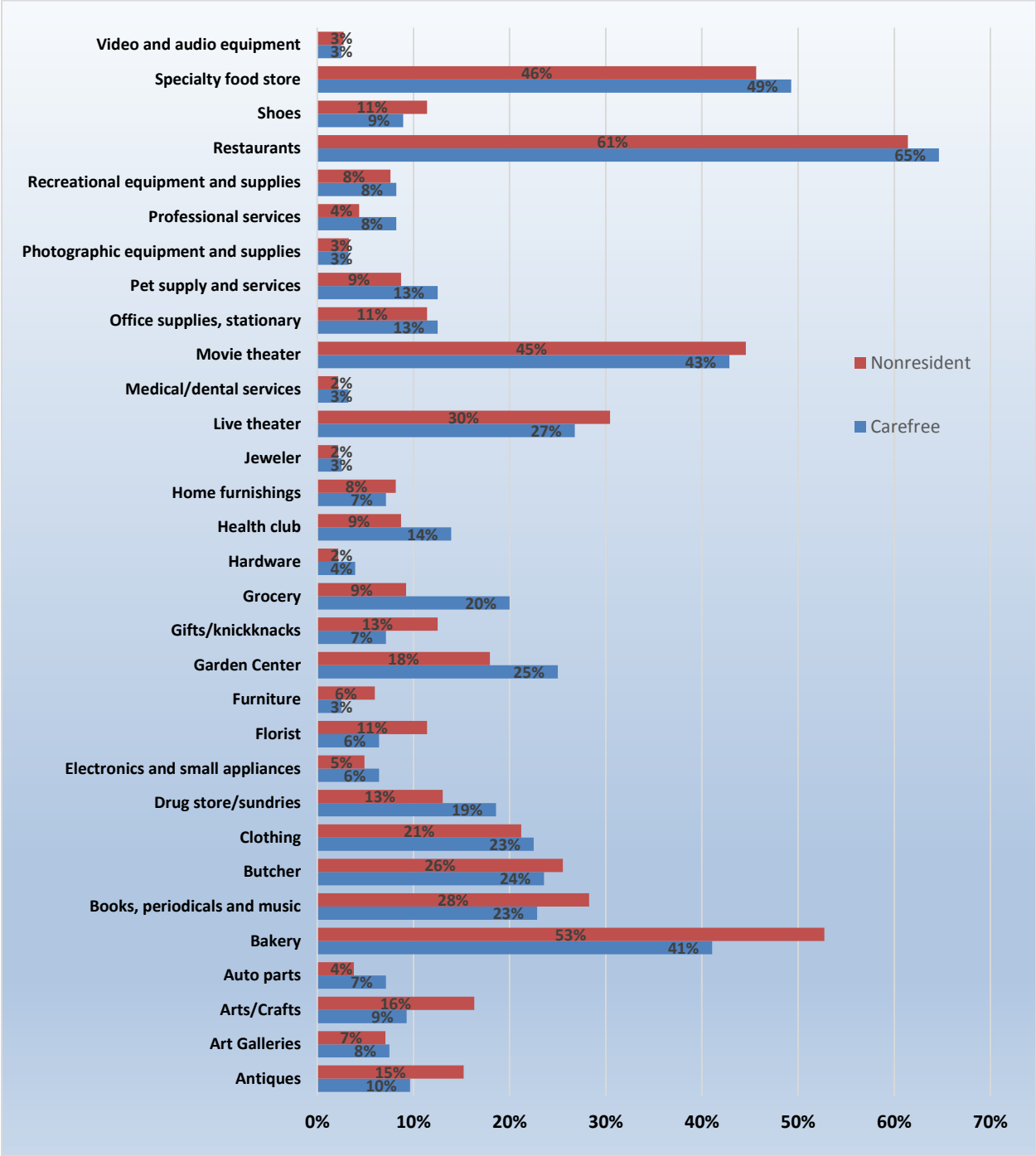
**Q8. Considering the Carefree Town Center, check up to FIVE changes that are necessary for merchants to get even more of your business.**



- Both Carefree residents and nonresidents want more variety of stores with nonresidents at 80% and residents at 76%.
- 62% of Carefree residents have a greater desire for more places to eat and better selection of merchandise.
- A greater percentage of nonresidents than Carefree residents want evening store hours (30%) consistent store hours (27%) improved parking (23%) better atmosphere, and more advertising.
- A greater percentage of Carefree residents than nonresidents want more competitive pricing (45%) and better quality of merchandise (31%).



**Q9. What FIVE potential businesses would you most likely use if they were to open in the Carefree Town Center?**



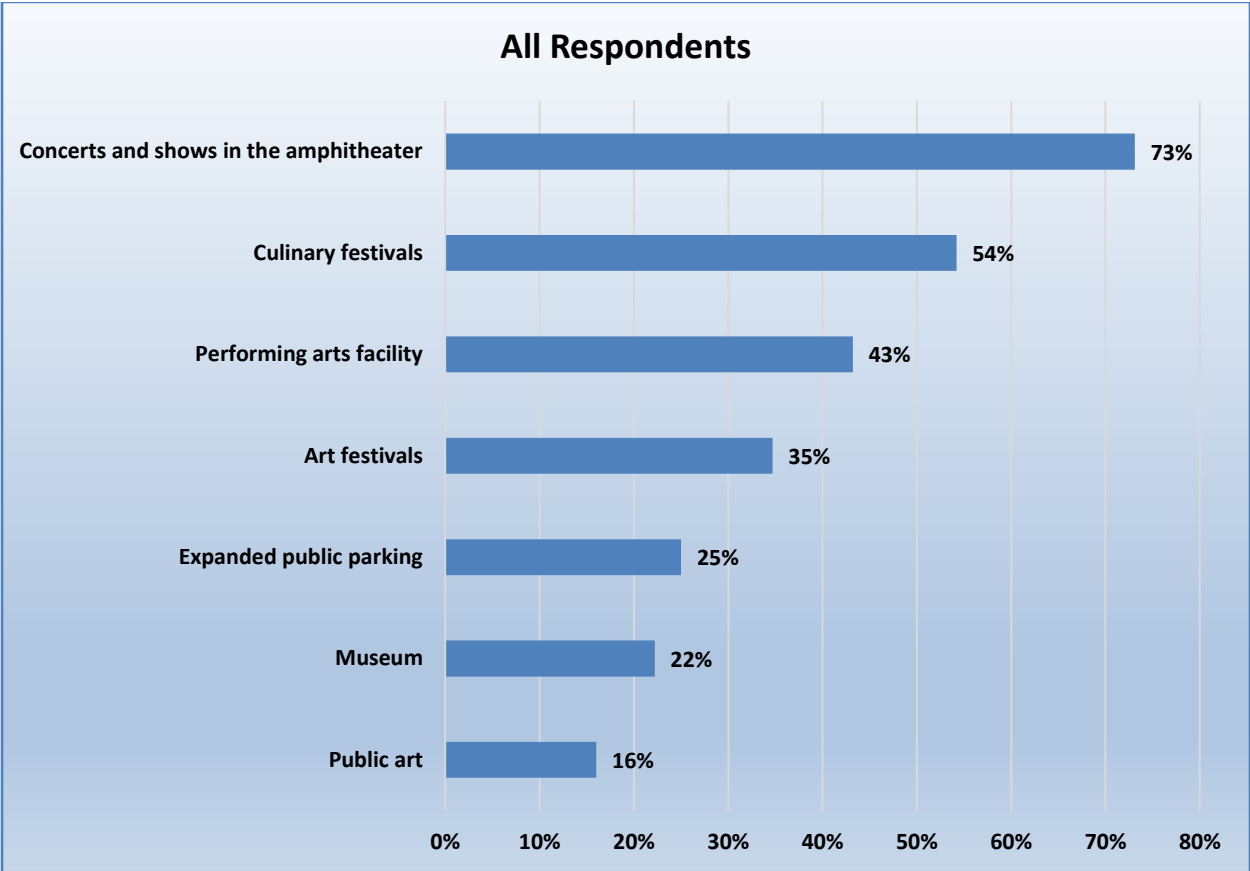
- Of the top five business that respondents desire three are food related. Both Carefree residents and nonresidents indicated that restaurants were their first choice with 65% of Carefree residents and 61% of nonresidents.
- Strong support is indicated for a specialty food store, bakery and movie theater.



- Below is the top five choices for Carefree residents and nonresidents:

Carefree Residents	Nonresident
1. Restaurants	1. Restaurants
2. Specialty food store	2. Bakery
3. Movie theater	3. Specialty food store
4. Bakery	4. Movie theater
5. Live theater	5. Live theater

**Q10. Which community assets/activities would you most like to see come to the Carefree Town Center?**

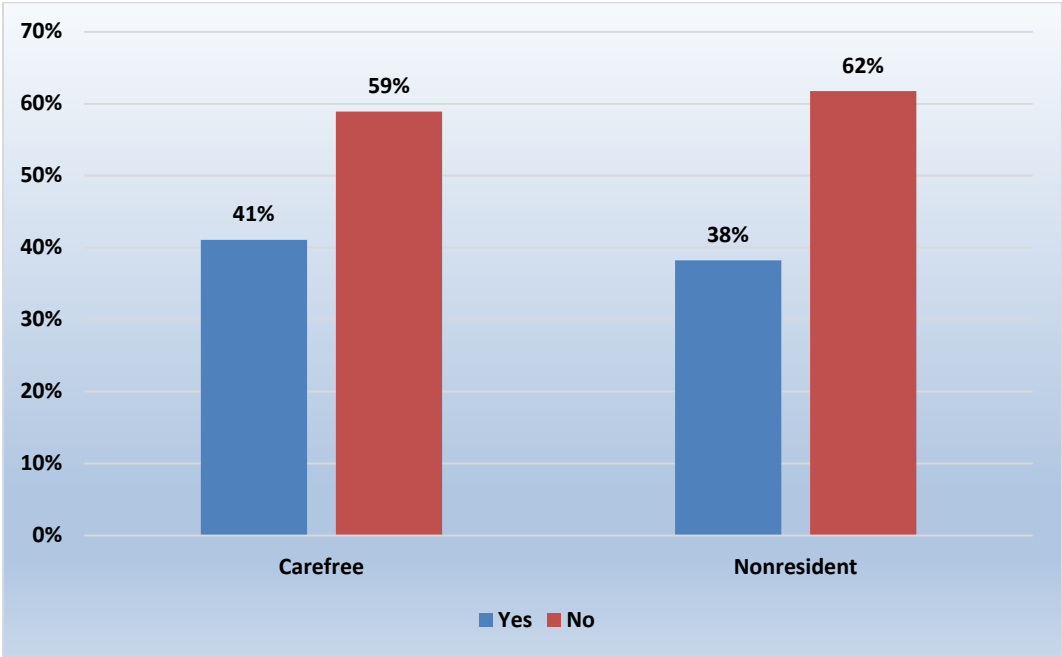


- Concerts and shows in the amphitheater is the top choice among all respondents at 73%.
- A breakdown of Carefree residents and nonresidents is remarkable the same. The top four choices did not change, however the fifth choice among carefree residents is a museum at 26% followed by expanded public parking at 22%.
- The following table provides a comparison of the ranking of all respondents, Carefree residents and nonresidents.



Community Assets/Activities	All Respondents	Carefree Resident	Nonresident
Concerts and shows in the amphitheater	1	1	1
Culinary festivals	2	2	2
Performing arts facility	3	3	3
Art festivals	4	4	4
Expanded public parking	5	6	5
Museum	6	5	6
Public art	7	7	7

**Q11. Have you ever lived downtown in any community?**

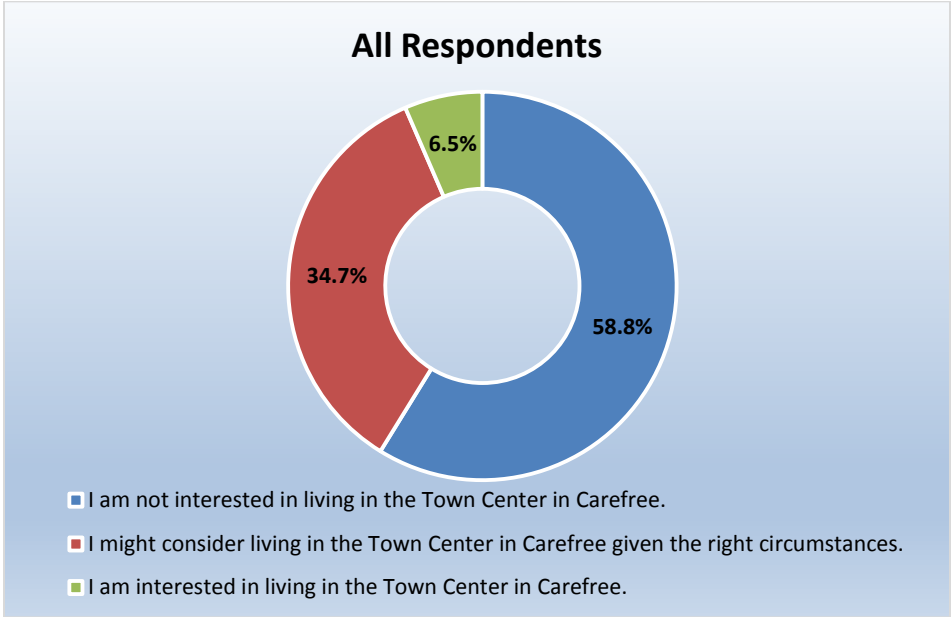


- The majority of respondents have not lived downtown in any community
- A larger percentage of Carefree residents have lived downtown than nonresidents.

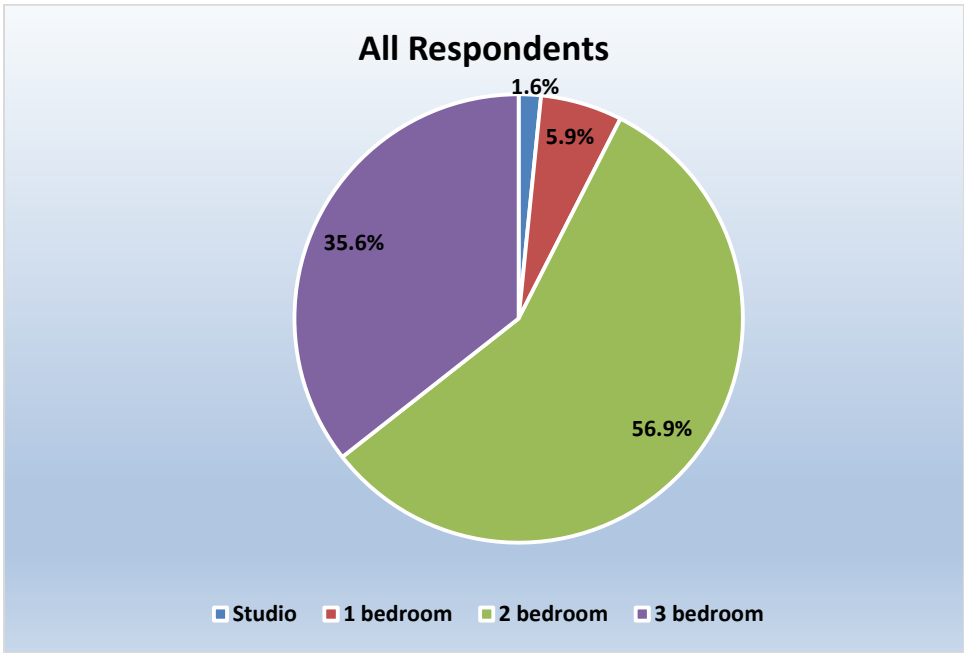




**Q12. What is your opinion about living in Carefree Town Center?**



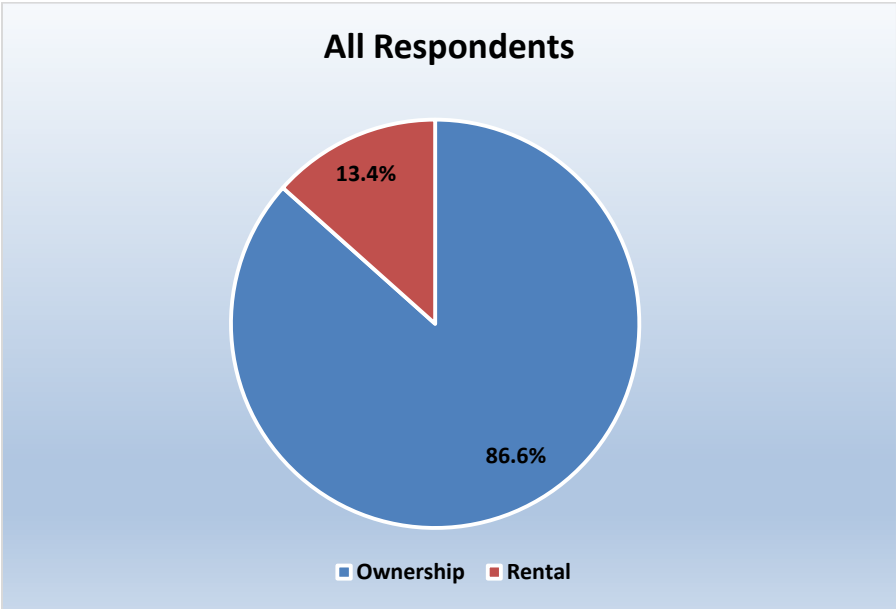
**Q13. If you moved to Carefree Town Center, what size housing unit would you require?**



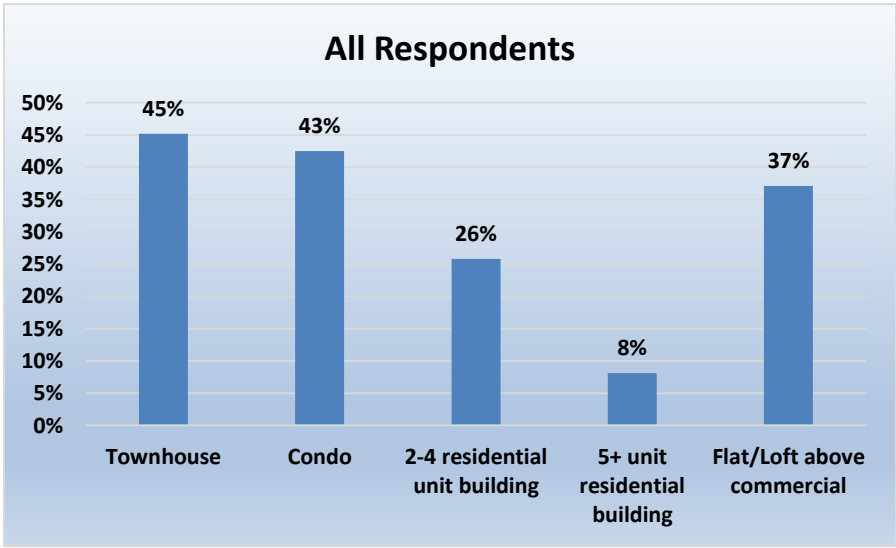
- 41% of the respondents indicated an interest in living in the Carefree Village
- Of the respondents who indicated an interest, nearly 57% would be interested in a 2-bedroom unit.



Q14. What housing arrangement would you choose?



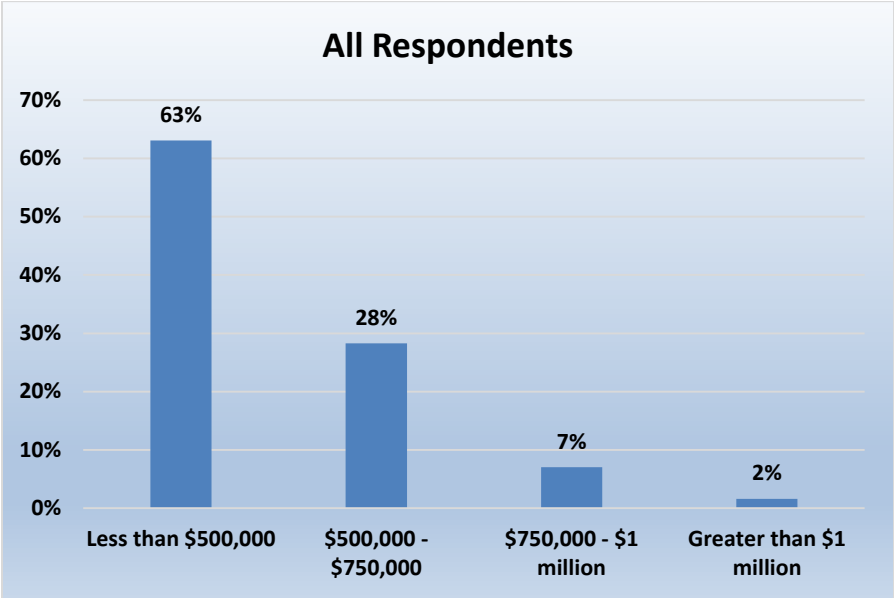
Q15. What type of Carefree Town Center housing would you prefer?



- The vast majority of those who might be interested in living in the Carefree Village would prefer to own rather than rent, 86.6% versus 13.4%.
- A greater percentage of nonresidents would rent (17%) than own (83%).
- The type of housing respondents are most interested in are townhouses and condos.



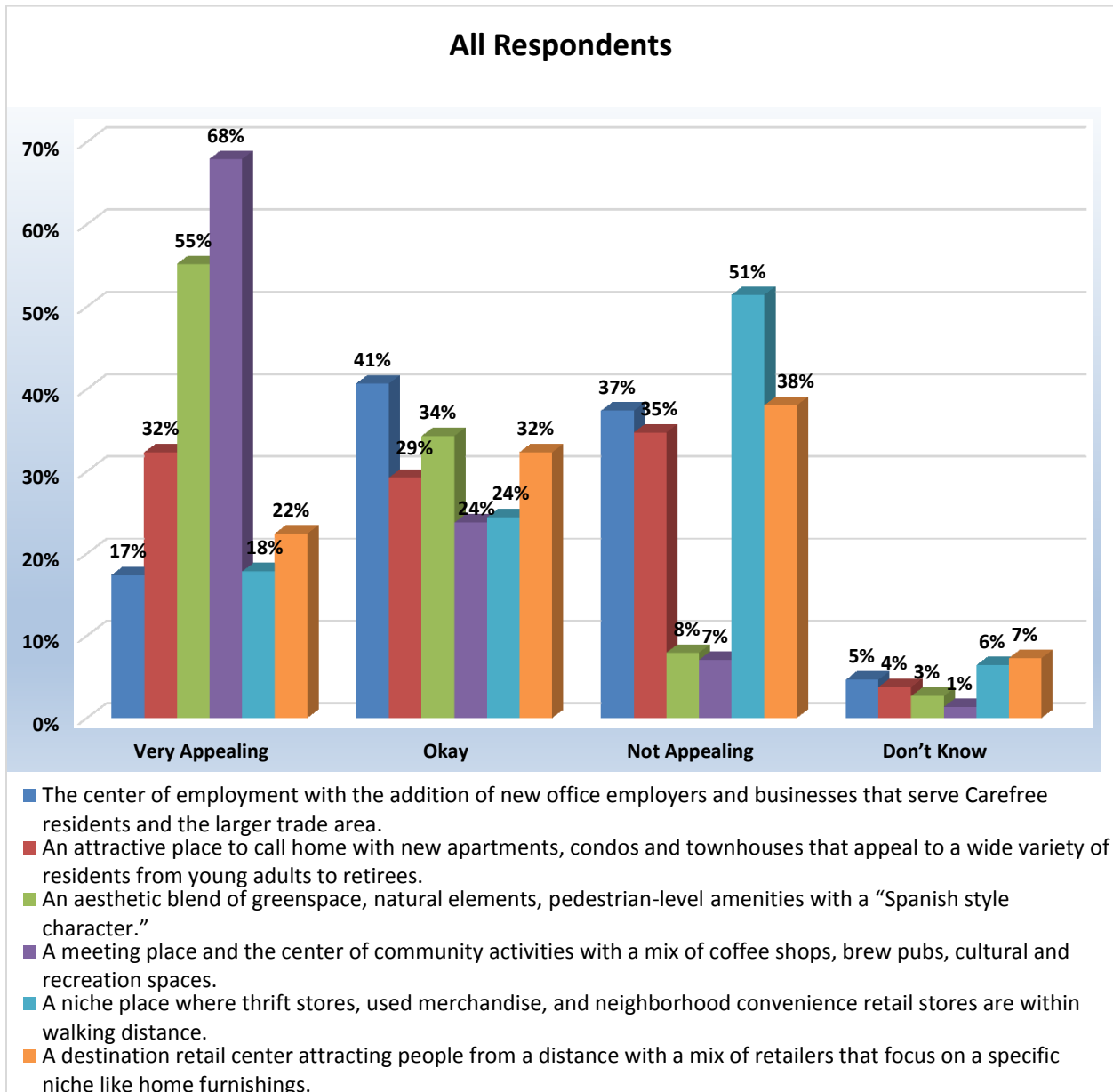
Q16. What price range would you consider?



- 63% of all respondents would be interested in a price range below \$500,000, with 28% indicating a price range of \$500,000 to \$750,000.
- When examining just Carefree residents, there is a greater percentage (34%) that would be interested in the \$500,000-\$750,000 price point.



**Q17. Imagine the Carefree Town Center in ten years. How appealing are these future scenarios?**



- 68% of the respondents indicated that the most appealing scenario for the Carefree Village is “a meeting place and the center of community activities with a mix of coffee shops, brew pubs cultural and recreation spaces.”
- When reviewing the responses from Carefree residents only, they also selected the same scenario as very appealing.



## ABOUT YOU

### Q 18. What is the number of people living in your household?

What is your home zip code?

What is your work zip code?

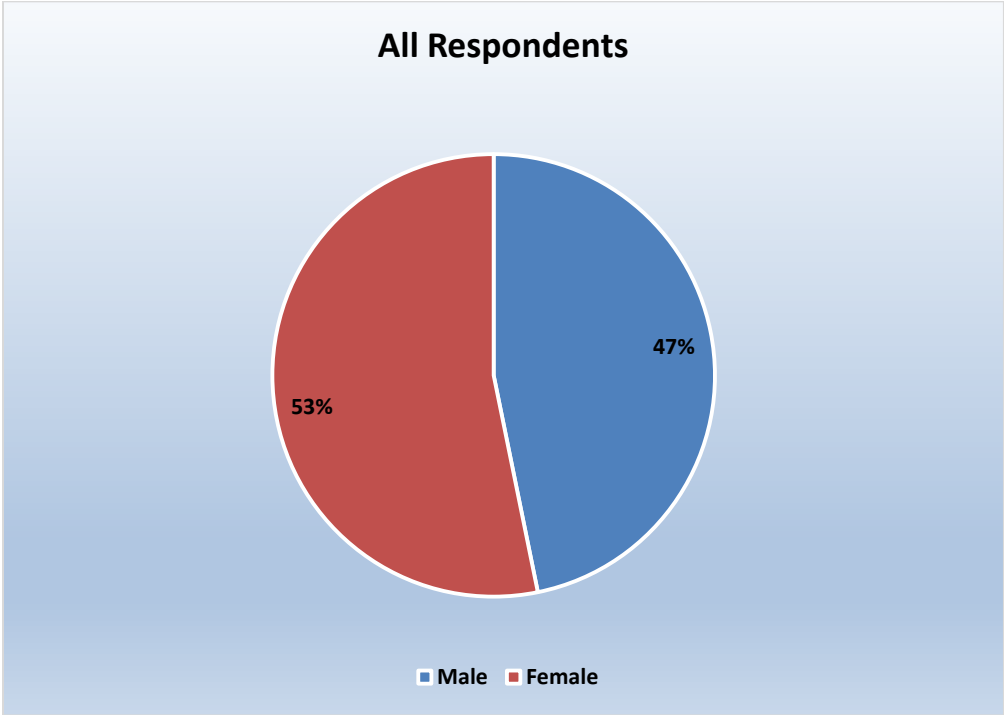
- The average number of people living in a household for all respondents is 2.2.

Home City	No.	Percent	Work City	Count	Percent
Carefree	283	63.0%	Carefree	138	46.3%
Cave Creek	76	16.9%	Cave Creek	60	20.1%
Scottsdale	48	10.7%	Scottsdale	54	18.1%
Phoenix	25	5.6%	Phoenix	23	7.7%
Mesa	2	0.4%	Mesa	1	0.3%
Glendale	1	0.2%	Glendale	2	0.7%
Peoria	1	0.2%	Gila Bend	1	0.3%
Gila Bend	1	0.2%	Palo Verde	1	0.3%
Sammamish, WA	1	0.2%	Sun City West	1	0.3%
Seattle, WA	1	0.2%	Casa Grande	1	0.3%
Gambrills, MD	1	0.2%	New River	1	0.3%
Apopka, FL	1	0.2%	Salt Lake City, UT	1	0.3%
Melber, KY	2	0.4%	Dillon, CO	1	0.3%
Iowa City IA	1	0.2%	Boulder, CO	1	0.3%
Bismark, ND	1	0.2%	Chicago, IL	3	1.0%
Chicago, IL	1	0.2%	Northbrook, IL	1	0.3%
Oklahoma City, OK	1	0.2%	Island Lake, IL	1	0.3%
Boulder, CO	1	0.2%	Bismarck, ND	1	0.3%
Ft. Collins, CO	1	0.2%	Iowa City, IA	1	0.3%
<b>Total</b>	<b>449</b>	<b>100.0%</b>	Northville, MI	1	0.3%
			Melber, KY	1	0.3%
			Schenectady, NY	1	0.3%
			Purchase, NY	1	0.3%
			Chappaqua, NY	1	0.3%
			<b>Total</b>	<b>298</b>	<b>100.0%</b>

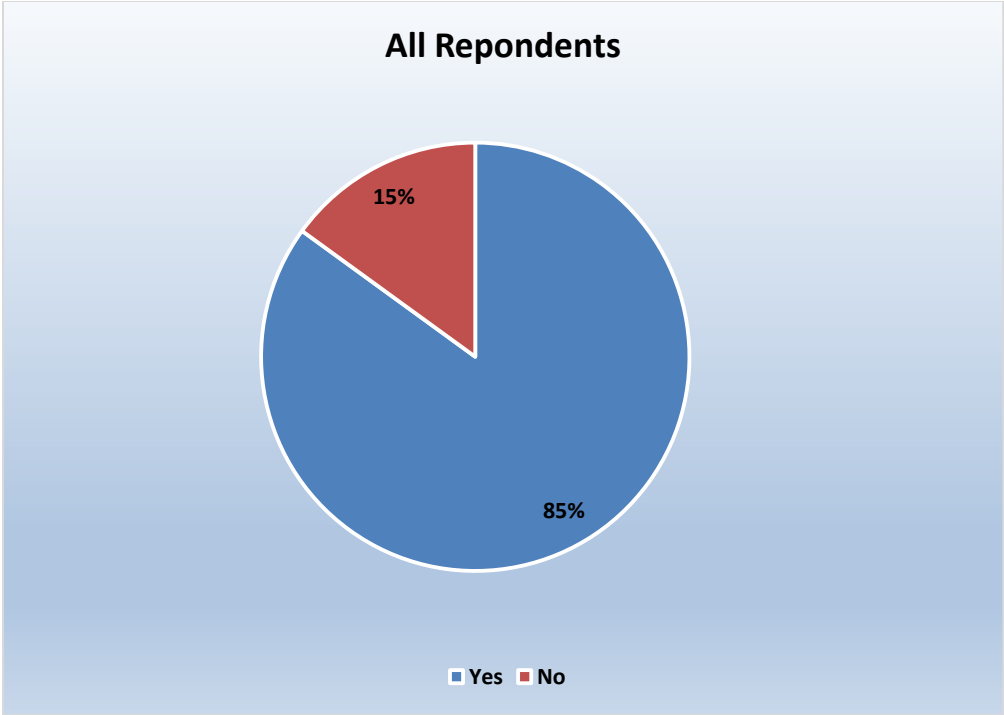
- 63% of the respondents reside in Carefree with 34% living in other valley communities. 3% of the respondents reside out of state.
- 46% of respondents work in Carefree with another 49% working in other valley cities. 5% work out of state.



Q19. What is your gender?



Q20. Do you reside full time in Carefree or other Arizona City?



**Q21. What is the zip code of your seasonal/other residence?**

Seasonal Residence	Count	Percent
Alaska	1	2.2%
California	3	6.7%
Colorado	3	6.7%
France	1	2.2%
Illinois	9	20.0%
Kansas	1	2.2%
Michigan	4	8.9%
Minnesota	2	4.4%
Montana	2	4.4%
New York	1	2.2%
North Dakota	1	2.2%
Ohio	3	6.7%
Oklahoma	1	2.2%
Utah	1	2.2%
Washington	10	22.2%
Wisconsin	2	4.4%
<b>Total</b>	<b>45</b>	<b>100.0%</b>

- The two biggest markets in which seasonal homes are located are Washington State at 22% and Illinois at 20%. Michigan comes in at 9%.

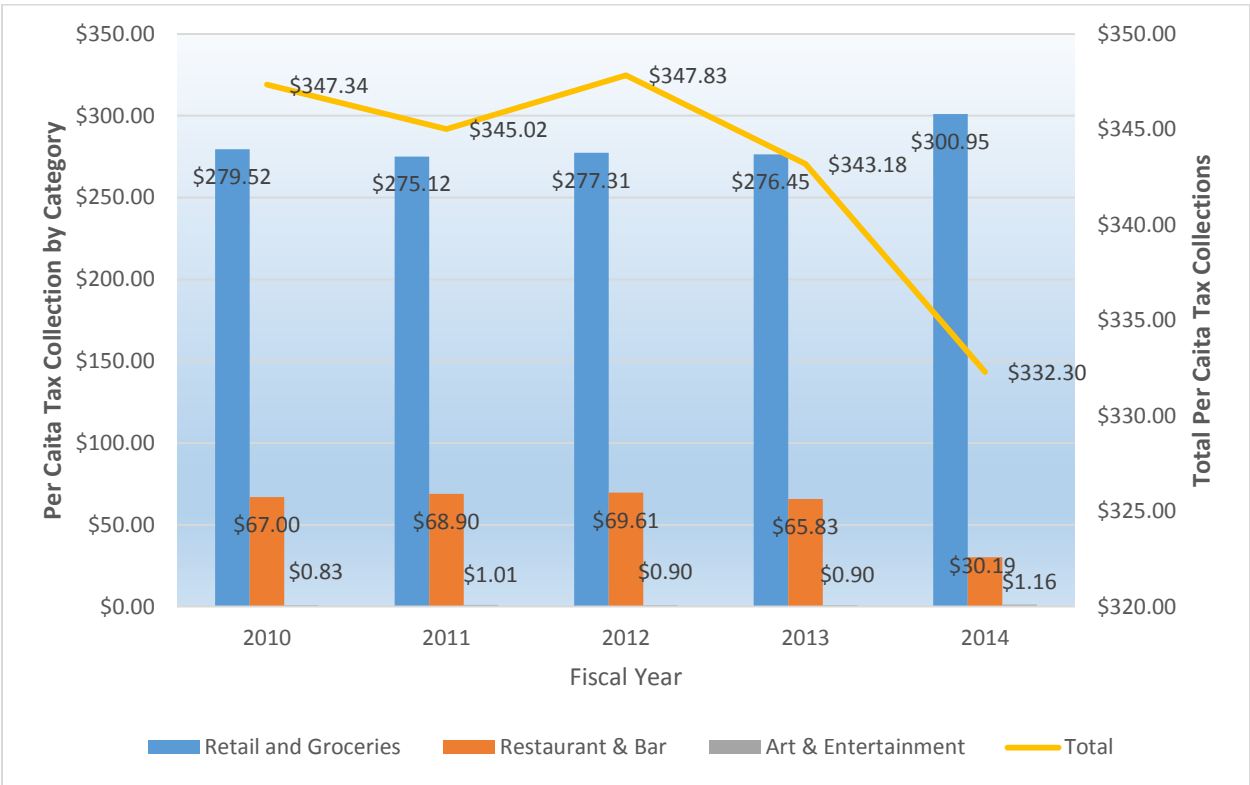


# V. DEMAND ANALYSIS

## HISTORICAL TAX COLLECTIONS

An analysis of Carefree’s tax collections was conducted over five fiscal years to understand trends and identify where revenue growth is derived. The three categories analyzed include retail, restaurant/bar and arts and entertainment. Retail sales tax comprise the lion’s share of Carefree’s tax collections, representing 90 percent of all collections in 2014. Restaurant and bar amounts to 9 percent and arts and entertainment is barely 1 percent of all collections. The biggest decline in tax revenue during FY 2014 was in restaurant and bar sales. Tax revenue in this category decreased by more than half of all other preceding fiscal years. Since 2010 the overall per capita tax collections have shown a pattern of decline from \$347 to \$332 per capita in 2014, which represents a 4 percent decrease.

Figure 15 - Per Capita Tax Collections by Fiscal Year





## TRADE LEAKAGE

Within every market there exists some retail trade leakage. Trade leakage suggests that there is unmet demand in the community and that additional store space can be supported. This trade leakage analysis examines the spending taking place outside of the Town of Carefree, some of which could potentially be captured by the local market.

The sales tax data that the city collects was aggregated into three categories (retail/groceries, restaurant/bar and arts and entertainment) and the Carefree sales tax rate of 3% for retail and 2% for groceries was applied to derive total sales for each category. Fiscal Year 2014, noted in Table 7, shows tax collections of \$1.16 million translating to \$40.8 million in sales revenue.

**Table 7 - Carefree Sales Tax Collections and Total Sales by Fiscal Year**

	FY2010	FY2011	FY2012	FY2013	FY2014
<b>Tax Collections</b>					
Retail & Groceries	\$941,136	\$934,291	\$955,619	\$963,974	\$1,053,324
Restaurant & Bar	\$225,575	\$233,973	\$239,891	\$229,558	\$105,262
Art & Entertainment	\$2,799	\$3,420	\$3,116	\$3,140	\$4,069
Total	\$1,169,510	\$1,171,684	\$1,198,626	\$1,196,672	\$1,162,655
<b>Sales Revenue</b>					
Retail & Groceries	\$33,241,292	\$33,210,101	\$33,873,510	\$34,055,153	\$36,886,832
Restaurant & Bar	\$7,519,167	\$7,799,100	\$7,996,367	\$7,651,933	\$3,508,733
Art & Entertainment	\$93,300	\$114,000	\$103,867	\$104,667	\$135,633
Total	\$40,853,759	\$41,123,201	\$41,973,744	\$41,811,753	\$40,531,199

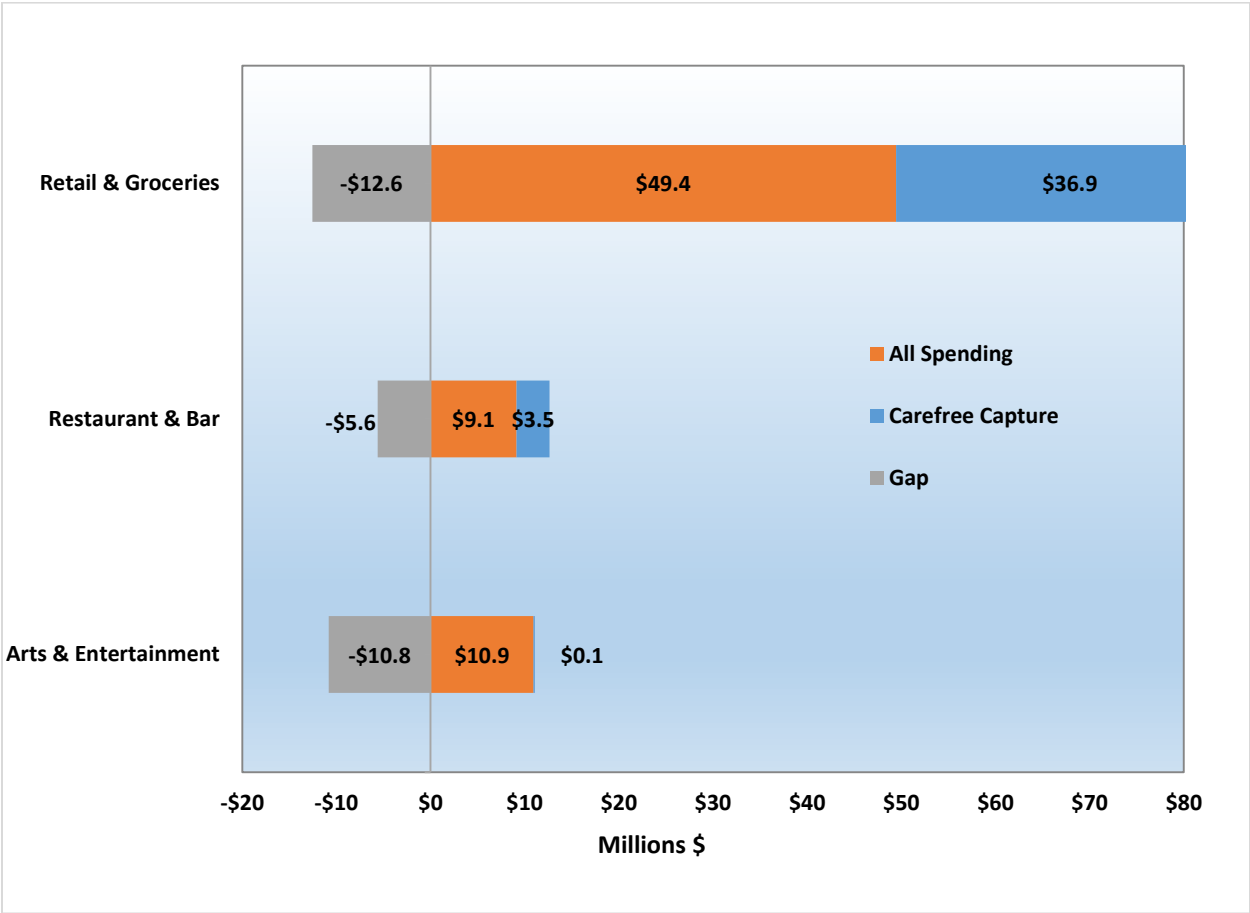
Sales generated per household for Fiscal Year 2014 was calculated and then compared to the most recent consumer household expenditure data prepared by the U.S. Bureau of Labor Statistics for the Phoenix MSA. For evaluation purposes, this data was aggregated into the same three categories used by the Town of Carefree. The consumer expenditure analysis was then compared to the Town's total revenue by retail category.



Figure 16 provides a comparison of the potential spending against the actual spending captured in Carefree. Actual sales lag potential sales in all of the three retail categories. Retail shows a gap of \$12.6 million with Restaurant and Bar at \$5.6 million and Art and Entertainment at \$10.8 million.



Figure 16 - Town of Carefree Trade Leakage



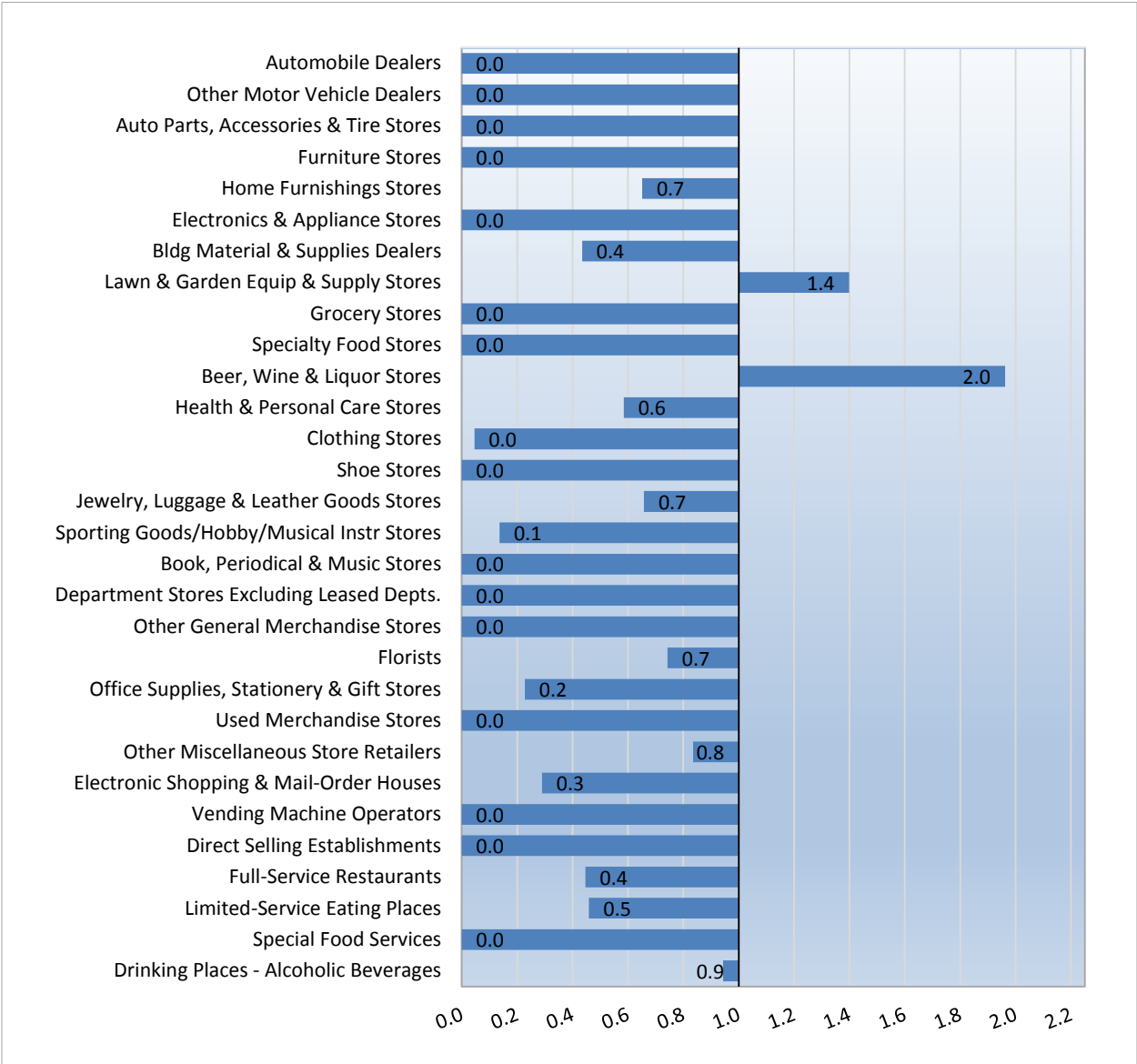
Source: Town of Carefree, Consumer Expenditure Survey

### RETAIL GAPS

ESI Corp utilized Esri Retail Marketplace data to identify where retail gaps occur by calculating the Leakage/Surplus Index for the Town of Carefree and the Market Trade Area. This index provides a relative comparison of the supply and demand across several retail product categories. The measurement scale starts at zero and goes up from there, with 1.0 representing equilibrium, less than 1.0 means that out-shopping is taking place, and an index greater than 1.0 means that Carefree is attracting trade from outside of the Town. As can be seen in Figure 17, home furnishing has an index of .70 which means that demand exceeds sales by 30 percent and that consumers are leaving the area. In contrast, lawn and garden equipment has an index of 1.4 which means that sales exceed demand and Carefree is capturing residents and attracting consumers from outside the Town.



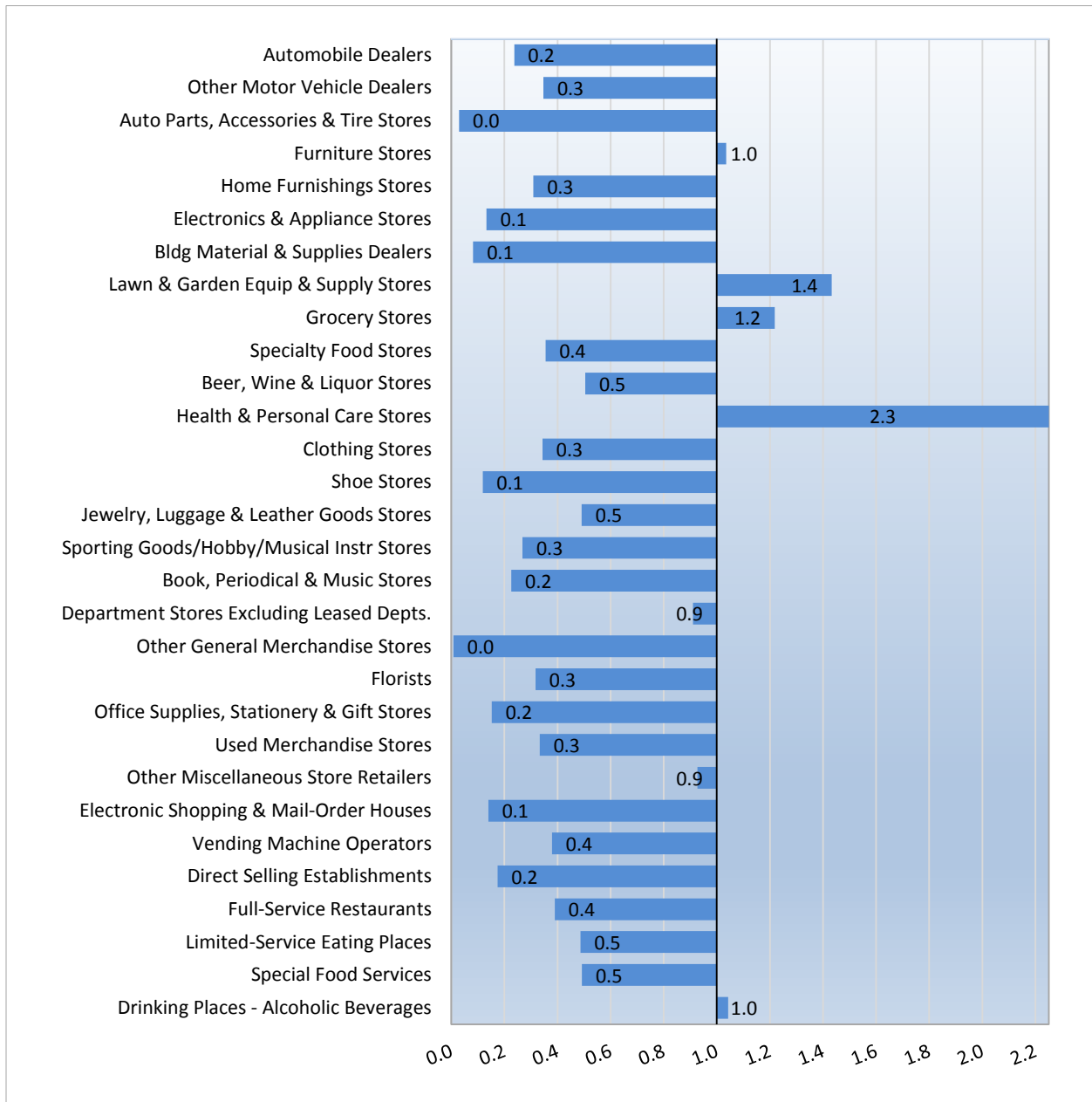
Figure 17 - Town of Carefree Leakage/Surplus Index



In contrast to the Town of Carefree is the Market Trade Area Leakage/Surplus Index. As mentioned earlier the trade area contains 82,150 people with a median household income of \$102,972. As can be seen in Figure 18, the trade area also suffers from retail trade leakage in the same categories as Carefree with the exception of furniture stores, grocery stores, health and personal care and drinking establishments.



Figure 18 - Trade Area Leakage/Surplus Index



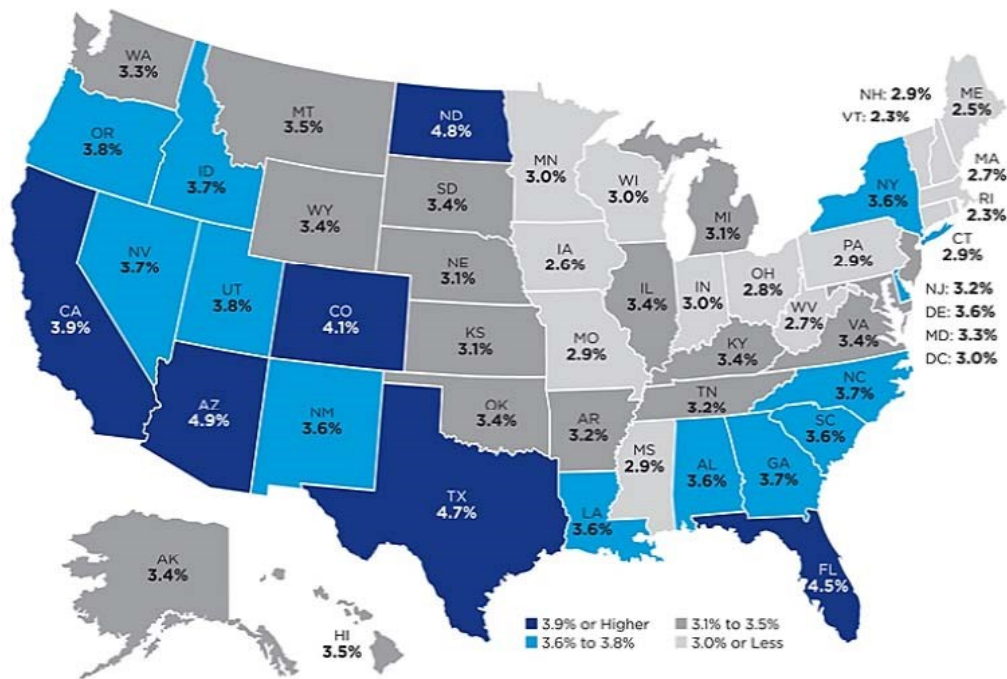
## CONSUMER EXPENDITURE PROJECTION

As Carefree and the Trade Area continues to grow the potential for increased consumer demand is envisioned. Using the U.S. Consumer Expenditure Survey data for the Phoenix MSA, combined with the household average annual expenditures and MAG’s resident household projections, ESI calculated household spending for residents living within Carefree and the Trade Area, identified in Table 8 on the following page.

Of the total annual Carefree household expenditures of \$145,301,408 for the year 2014, retail purchases amount to 47.8 percent of all spending or \$69.4 million. Of this amount the Town of Carefree captures 58.4 percent, which is based on retail sales revenue calculated from the Town’s sales tax collections. When comparing Carefree actual sales of \$40.5 million to the total retail expenditures in the Market Trade Area (\$1.3 billion) Carefree captures 2.9 percent of all spending within the Market Trade Area. Between 2014 and 2020, retail expenditures in Carefree are projected to increase by \$5.8 million, which could potentially be available to support net new retail and eating and drinking establishments in the Carefree Village.

As another indicator of projected growth in restaurant sales, the National Restaurant Association prepares an industry forecast by state and Arizona is among the top six states that is projected to experience sales growth 3.9 percent or greater.

### Restaurant Sales Growth in 2014 (Projected)



Source: National Restaurant Association, 2014 Restaurant Industry Forecast



Table 8 - Carefree and Trade Area Projected Consumer Expenditures

Carefree				
Category	2014	2020	2030	2040
<b>Average annual household expenditures</b>	\$145,301,408	\$157,552,647	\$177,942,821	\$183,854,258
Total Non-Retail (52.2%)	\$75,847,335	\$82,242,482	\$92,886,153	\$95,971,923
Total Retail (47.8%)	\$69,454,073	\$75,310,165	\$85,056,668	\$87,882,335
Food	\$18,887,696	\$20,480,231	\$23,130,745	\$23,899,172
Alcoholic Beverage	\$1,592,678	\$1,726,966	\$1,950,467	\$2,015,263
Housing	\$50,508,700	\$54,767,394	\$61,855,289	\$63,910,183
Apparel and services	\$5,051,140	\$5,477,033	\$6,185,860	\$6,391,360
Transportation	\$23,114,105	\$25,062,995	\$28,306,602	\$29,246,975
Healthcare	\$8,387,922	\$9,095,158	\$10,272,237	\$10,613,490
Entertainment	\$10,937,828	\$11,860,062	\$13,394,970	\$13,839,964
Personal care products and services	\$1,676,503	\$1,817,859	\$2,053,123	\$2,121,329
Reading	\$383,973	\$416,348	\$470,231	\$485,853
Education	\$1,105,951	\$1,199,200	\$1,354,399	\$1,399,393
Tobacco products and smoking supplies	\$1,116,767	\$1,210,929	\$1,367,645	\$1,413,079
Miscellaneous	\$2,649,956	\$2,873,390	\$3,245,258	\$3,353,069
Cash contributions	\$4,007,382	\$4,345,269	\$4,907,626	\$5,070,662
Personal insurance and pensions	\$15,875,399	\$17,213,950	\$19,441,748	\$20,087,622
Trade Area				
Category	2014	2020	2030	2040
<b>Average annual household expenditures</b>	\$2,902,346,580	\$3,363,800,720	\$4,408,745,040	\$5,043,984,680
Total Non-Retail (52.2%)	\$1,515,024,915	\$1,755,903,976	\$2,301,364,911	\$2,632,960,003
Total Retail (47.8%)	\$1,387,321,665	\$1,607,896,744	\$2,107,380,129	\$2,411,024,677
Food	\$377,275,349	\$437,259,664	\$573,091,730	\$655,666,381
Alcoholic Beverage	\$31,813,197	\$36,871,287	\$48,325,129	\$55,288,117
Housing	\$1,008,894,236	\$1,169,301,827	\$1,532,538,357	\$1,753,356,096
Apparel and services	\$100,894,825	\$116,936,443	\$153,262,040	\$175,344,996
Transportation	\$461,696,447	\$535,103,165	\$701,329,722	\$802,381,707
Healthcare	\$167,545,903	\$194,184,607	\$254,506,878	\$291,177,826
Entertainment	\$218,479,425	\$253,216,226	\$331,876,313	\$379,695,134
Personal care products and services	\$33,487,576	\$38,811,881	\$50,868,557	\$58,198,018
Reading	\$7,669,735	\$8,889,173	\$11,650,541	\$13,329,223
Education	\$22,090,998	\$25,603,322	\$33,556,839	\$38,391,918
Tobacco products and smoking supplies	\$22,307,046	\$25,853,721	\$33,885,023	\$38,767,389
Miscellaneous	\$52,931,974	\$61,347,813	\$80,405,139	\$91,990,416
Cash contributions	\$80,046,108	\$92,772,916	\$121,592,261	\$139,112,037
Personal insurance and pensions	\$317,105,737	\$367,523,477	\$481,692,419	\$551,097,684

Source: BLS, ESRI, and ESI Corp



## DEMAND FORECAST

An assessment of current real estate market conditions and available supply was prepared to determine the residual demand for additional retail and office space in Carefree through 2040. This chapter details ESI Corporation's analysis of retail and office demand in Carefree. To begin, a review of the general market conditions in the Phoenix Metro area was conducted to serve as a barometer for the current market cycle and to illustrate the uniqueness of Carefree's market. A demand model was then prepared to forecast the total square feet of commercial and office space that could be supported within the Carefree Village.

## Real Estate Trends

By the end of second quarter 2014, the metropolitan Phoenix market had 148.7 million square feet of retail space with an overall vacancy rate of 9.8 percent, which represents a decrease from a year ago when the vacancy rate was 10.9 percent. Net absorption during this period amounted to 753,891 square feet.<sup>2</sup> The total square feet of retail space within the Market Trade Area represents 2.7 percent of the total space in metro Phoenix.

**Table 9 - Retail Inventory Comparison, Carefree, Trade Area and Phoenix MSA, 2nd Quarter 2014**

	<b>Total Square Feet</b>	<b>Vacancy Rate</b>	<b>Net Absorption</b>	<b>Sq. Ft. Under Construction</b>
Carefree	286,081	18.9%	1,895	0
Trade Area	3,974,617	10.9%	31,963	79,202
Phoenix MSA	148,704,953	9.8%	753,891	411,997

Source: Colliers International and CBRE

During the same quarter, Carefree had 286,081 square feet of retail space with a vacancy rate of 18.9 percent. Unlike metro Phoenix, Carefree's vacancy rate has been trending upwards (Figure 19). The Market Trade Area has 3.9 million square feet of retail space with a second quarter vacancy rate of 10.9 percent. The trend in vacancy rate for the Market Trade Area is similar to metro Phoenix and has been trending downward (Figure 20). The North Scottsdale market, in general, has a lower overall vacancy rate at 7 percent compared to the metro Phoenix market.<sup>3</sup>

<sup>2</sup> CBRE, "Phoenix Retail MarketView," 2<sup>nd</sup> Quarter 2014.

<sup>3</sup> Ibid.





Figure 19 - Carefree Retail Trends

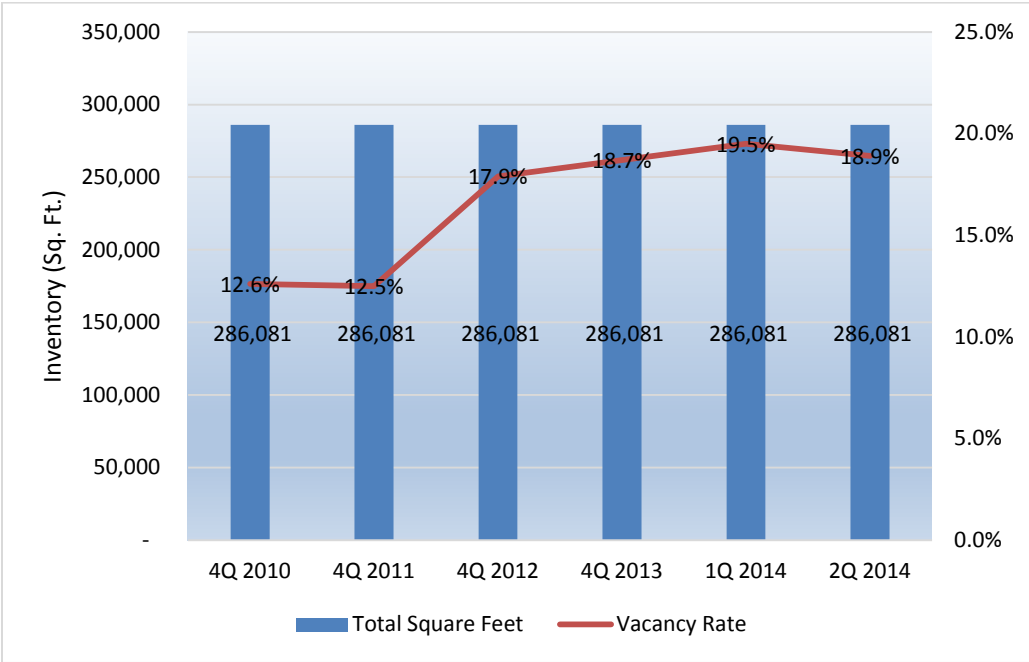
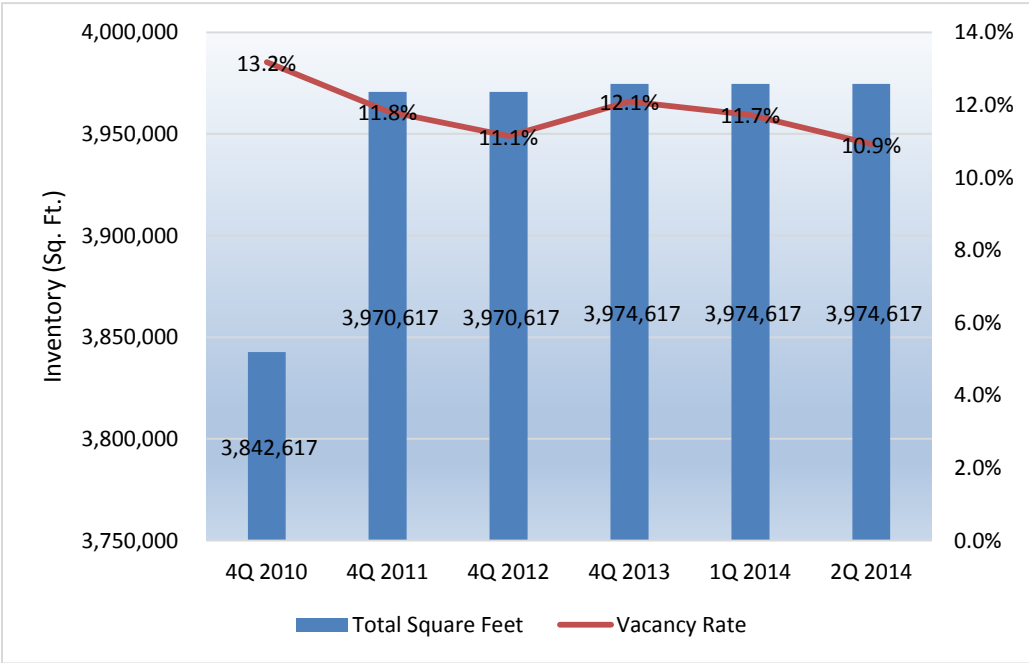


Figure 20 - Market Trade Area Retail Trends



With respect to the office market, the Phoenix metropolitan area had 80.9 million square feet of office space in third quarter 2014 with an overall vacancy rate of 21.7 percent. Net absorption within this quarter experienced the largest gain seen in seven quarters.<sup>4</sup> The total square feet of office space within the Market Trade Area represents 3.5 percent of the total office space for the metro Phoenix market.

<sup>4</sup> CBRE, "Phoenix Office MarketView," 3<sup>rd</sup> Quarter, 2014.



**Table 10 - Office Inventory Comparison, Carefree, Trade Area and Phoenix MSA, 2nd Quarter 2014**

	Total Square Feet	Vacancy Rate	Net Absorption	Under Construction
Carefree	231,579	25.9%	(6,626)	-
Trade Area	2,860,796	25.9%	(38,897)	-
Phoenix MSA <sup>1</sup>	80,962,881	21.7%	1,458,189	2,039,189

<sup>1</sup>3rd Qtr, 2014

Source: Colliers International and CBRE

The total square feet of office space in Carefree has held constant at 231,579 square feet over the last four years. Vacancy rates experienced an increase to 18.9 percent since the first quarter of this year (Figure 21) but is less than it was during 2010 through 2012. By contrast the Market Trade Area has 2.8 million square feet of office space with a second quarter vacancy rate of 25.9 percent (Figure 22).

**Figure 21 - Carefree Office Trends**

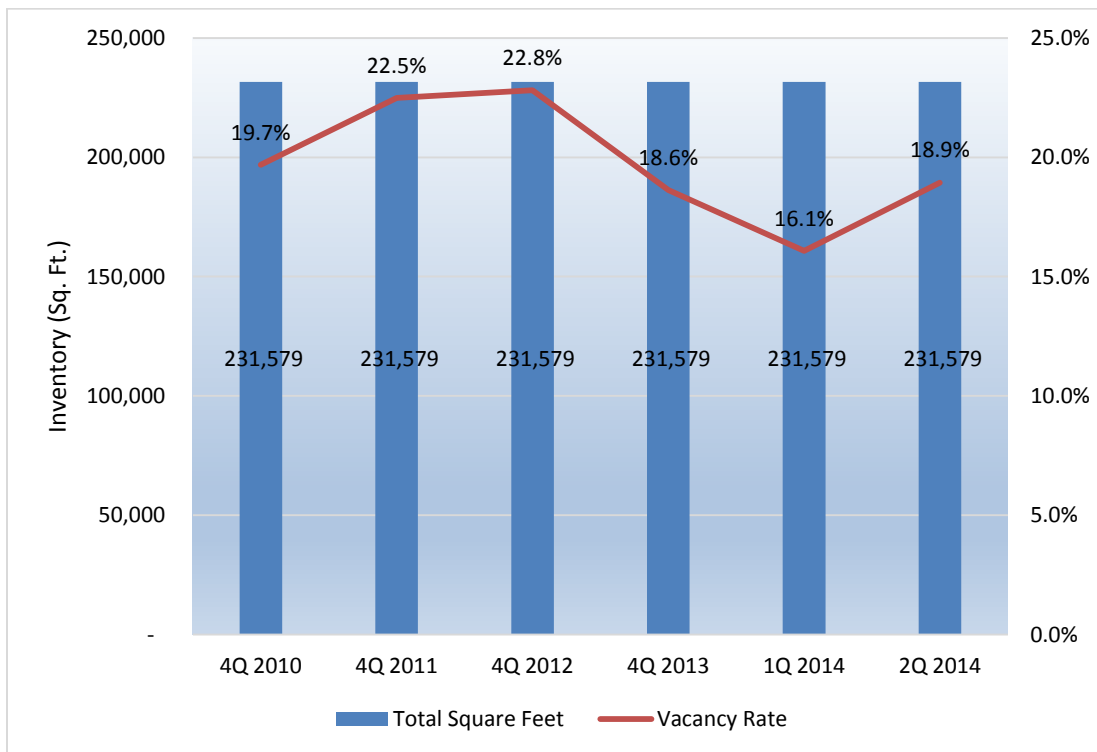
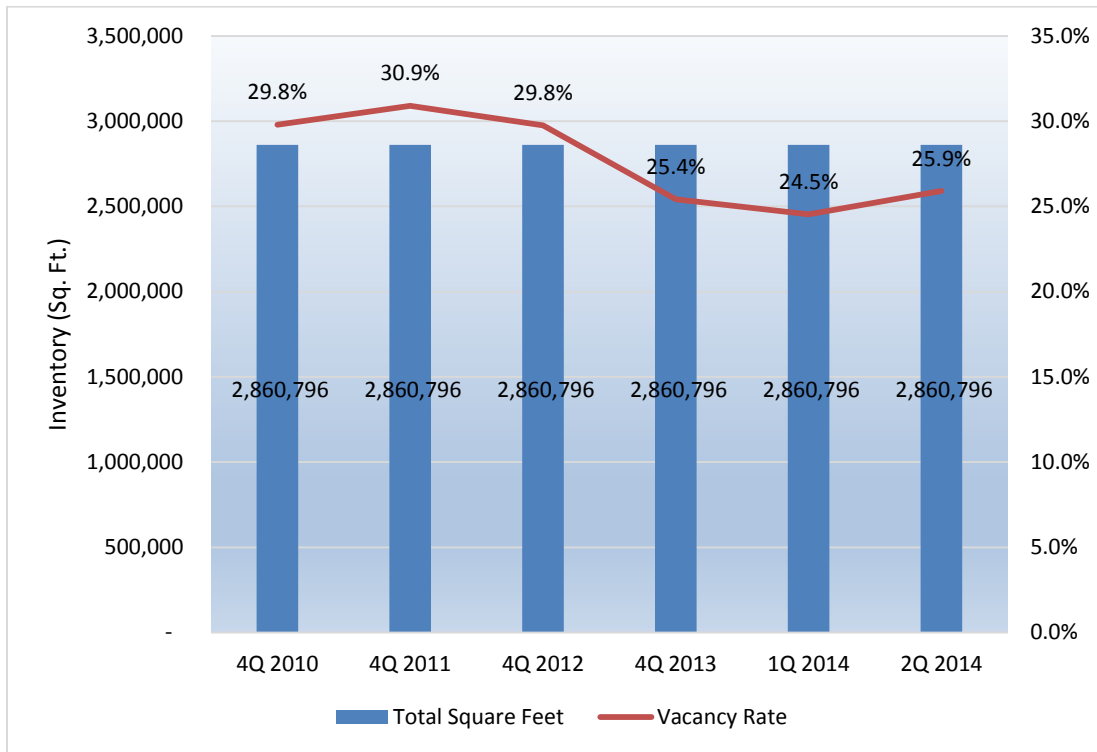


Figure 22 - Market Trade Area Office Trends



## Retail Demand

When forecasting the demand for retail space within the Carefree Village, a number of market segments were analyzed including: households, employees, and demand from the secondary trade area. Varied assumptions were incorporated into the demand model including the percentage of household income spent on retail items, retention of sales within Carefree, employee spending within the commercial core, and demand from the secondary trade area.

Several data sources were utilized in this analysis and include MAG's household projections, Esri's median household income, Colliers retail and office occupied square feet, and the Bureau of Labor Statistics Consumer Expenditure Survey. In addition, the Town of Carefree sales tax collections were converted into sales revenue, which was used to calculate the percent of resident spending that is retained in Carefree, as well as retail sales per square foot. Factors that were held constant throughout each timeframe include the percent of discretionary income spent on retail items (47.8%), the percent of Carefree resident spending in Carefree (58.4%) and the retail sales per square foot (\$175).

Also factored into this demand analysis is the potential spending by office workers. In a recent retail spending study conducted by the International Council of Shopping Centers (ICSC) results show that spending by office workers as they head to and return from work can be a major source of sales revenue. Their findings concluded that office workers in an urban market spent \$165 per week on the purchase of goods and services within the vicinity of their office building. They also found that the demand is 2.5 times higher if the market has an abundance of retail, as opposed to other markets with limited offerings. The total amount spent annually on transportation, dining and goods and services is \$8,580. For this analysis, weekly spending was calculated based on 50 weeks to account for personal leave. In addition, the annual spending amount was discounted by 50 percent in 2014 to reflect the lack



of retail offerings in the Carefree Village. This percentage increases to 60 percent in 2020 and remains constant for the subsequent years.

The retail demand analysis presented in Table 11 shows that in 2014 the Carefree market can support a total of 261,598 square feet of retail space. However, when compared to the total inventory of retail space in Carefree (286,081 square feet) there is a calculated surplus of 24,483 square feet of space. What the analysis does not take into consideration is the amount of existing square footage that is not desirable to retail tenants due to its location or size. Meaning, that the market may very well be likely to support additional retail if new space was available or existing space redeveloped.

By 2020 the market is presumed to support 289,081 square feet showing a shortage of 2,932 square feet. Over the 26 year time horizon, the net new demand for retail space amounts to 82,165 square feet of retail space.

**Table 11 - Carefree Village Retail Market Demand**

	2014	2020	2030	2040
Households	1,696	1,839	2,077	2,146
Median Household Income	\$87,938	\$87,938	\$87,938	\$87,938
Percent of Income spent on Retail	47.8%	47.8%	47.8%	47.8%
Total Potential Retail Spending	\$69,454,073	\$75,310,165	\$85,056,668	\$87,882,335
Capture in Carefree	58.4%	58.4%	58.4%	58.4%
Retail Sales Potential Carefree Residents	\$40,531,199	\$43,948,629	\$49,636,379	\$51,285,349
Sales Per Square Foot	\$175	\$175	\$175	\$175
Sq. Ft. Demand from Households	232,126	251,698	284,272	293,716
Sq. Ft. Demand from Employees	9,660	15,565	18,382	24,341
Sq. Ft. Demand from Secondary Trade Area	6,732	7,299	8,244	8,518
Total occupied Retail Space	248,518	274,563	310,898	326,575
Plus frictional vacancy @ 5%	13,080	14,451	16,363	17,188
<b>Total Forecast Demand in sq. ft.</b>	<b>261,598</b>	<b>289,013</b>	<b>327,261</b>	<b>343,763</b>
Less Sq. Ft. Supply of Existing Retail	286,081	286,081	286,081	286,081
Less Sq. Ft. Proposed/Under Construction	0	0	0	0
<b>Residual Demand of Retail Space (Excess)/Shortage</b>	<b>(24,483)</b>	<b>2,932</b>	<b>41,180</b>	<b>57,682</b>

Source: MAG, Esri, Consumer Expenditure Survey, Colliers International, ESI Corp



## Office Demand

The analysis for office demand is based on MAG's projected employment, number of employees in office jobs, and employees per square foot. For 2014 the employees per square foot was calculated on the total occupied square feet (187,716) divided by the total number of office workers, resulting in 428 square feet per employee. MAG uses a target of 330 square feet per office job, so for subsequent years it was assumed that square feet per job would decrease. Office jobs are multiplied by the applicable employment per square foot figure to calculate the total square feet needed.

The findings in Table 12 show that there exists a surplus of 33,983 square feet of office space in Carefree in 2014. Based on employment growth by 2020 there is a shortage of 4,765 square feet of office space. Over the course of 26 years of this analysis, net new demand for office space is 42,088 square feet.

**Table 12 - Carefree Village Office Market Demand**

	2014	2020	2030	2040
Total citywide employment	1,549	1,899	2,157	2,423
Percentage occupying office space	28%	30%	31%	28%
Total employed in office space	439	569	663	690
Average sq. ft. per employee	428	395	362	330
Total occupied Office Space in Sq. Ft.	187,716	224,527	239,740	227,700
Plus frictional vacancy @ 5%	9,880	11,817	12,618	11,984
<b>Gross estimate of office demand in sq. ft.</b>	<b>197,596</b>	<b>236,344</b>	<b>252,358</b>	<b>239,684</b>
Less Sq. Ft. Supply of Existing Office	231,579	231,579	231,579	231,579
Less Sq. Ft. Proposed/Under Construction	0	0	0	0
<b>Marginal Demand - net (excess) shortage</b>	<b>(33,983)</b>	<b>4,765</b>	<b>20,779</b>	<b>8,105</b>

Source: MAG, Colliers International, ESI Corp

## MARKET SEGMENTS

It is important to bear in mind that there are a variety of variables that will influence the outcome of these findings, including existing and future competition, growth in the market and area demographics. In addition to the site location criteria of population threshold, many retailers and restaurants also have additional location criteria including: a minimum number of cars per day, a targeted demographic group (age, income, etc.), type of location<sup>5</sup> and preferred co-tenants such as grocery/supermarket, entertainment, fashion, etc. In addition to households, there will also be demand from employees, and visitors. Local and regionally based companies may have more relaxed site selection criteria.

Utilizing the findings of the consumer expenditure gap analysis, combined with the Carefree consumer survey and Tapestry Segmentation information, there appears to be a variety of commercial and entertainment related activity that Carefree should target, which is noted in Table 13.

<sup>5</sup> Type of location can include: enclosed super regional mall, enclosed regional mall, power center, outlet center, community strip center, neighborhood strip center, pad site/outparcel, mixed use center, downtown/central business district, freestanding, airport/transportation center, and college campus.



**Table 13 - Carefree Village Commercial and Entertainment Potential****Restaurants**

- Mexican
- Delicatessen/casual cafes and bistros
- Organic/healthy
- Seafood
- Brew pub/wine bar
- Organic/healthy

**Retail**

- Clothing and Accessories
- Pet supplies and services
- Luggage and leather goods
- Sports/Recreation/Exercise Equipment
- Health and personal care stores
- Book, periodical and music stores

**Specialty Food Stores**

- Bakery
- Wine and artisan cheese
- Organic/healthy
- Butcher/specialty meats

**Entertainment**

- Performing arts
- Culinary festivals
- Concerts and shows in the amphitheater
- Art festivals

The current mix of retail uses in the Carefree Village is not in line with what consumer's desire, as concluded from the consumer survey. Getting the right mix of retail that consumer's demand will invigorate the Carefree Village and allow it to compete with other comparable retail destinations. The challenge will be encouraging landlords to recruit appropriate high-quality tenants that match the interests of Carefree residents and the Market Trade Area, rather than leasing space to whomever is willing to pay the rent.

Office uses are demand anchors for retailers and restaurants, especially in the morning and at noontime. Professional practices that include medical, legal and financial services are also desirable as they steadily attract visitors and employ office staff, all who are potential shoppers.

Civic, cultural and entertainment anchors, such as a performing arts theater or museum, also attract a high number of visitors and create the opportunity for cross marketing with area restaurants and retailers. Nighttime uses such as restaurants and theaters can help make up for the smaller daytime population from office workers.

Adding residential living to a downtown or urban village has proven to be successful in other markets. New housing opportunities add excitement and helps create a sense of place. In addition, a residential component provides a built in customer base that can support existing retail and restaurants and serve as a draw to attract new business. Finally, the survey findings indicated a desire for living in the Carefree Village.



# APPENDIX A - TAPESTRY SEGMENTATION PROFILES



LifeMode Group: Senior Styles

# Silver and Gold

Households: 883,000

Average Household Size: 2.02

Median Age: 61.8

Median Household Income: \$63,000

9A



## WHO ARE WE?

Almost the oldest senior market (second to *The Elders*), the difference of 10 years in median age reveals a socioeconomic difference: This is the most affluent senior market and is still growing. The affluence of *Silver and Gold* has afforded the opportunity to retire to sunnier climates that feature exclusive communities and vacation homes. These consumers have the free time, stamina, and resources to enjoy the good life.

## OUR NEIGHBORHOOD

- Residents of *Silver and Gold* prefer a more bucolic setting, but close to metropolitan cities.
- Predominantly single-family, owner-occupied homes that have a median value of \$289,000 (Index 163).
- Neighborhoods include seasonal or vacation homes, reflected in the high vacancy rate of 35%.
- Mostly older married couples with no children, average household size is 2.02.

## SOCIOECONOMIC TRAITS

- Well-educated seniors, 44% have college degree(s).
- Primarily retired, but many still active in the labor force, participation rate of 41%.
- Low unemployment at 7.2% (Index 83); with self-employment highest among Tapestry markets (Index 222).
- More than half of the households with income from wages/salaries, Social Security, or investments, many drawing retirement income (Index 219).
- Connected, but primarily to get news and track investments, more likely to own an e-reader or tablet than a smartphone.



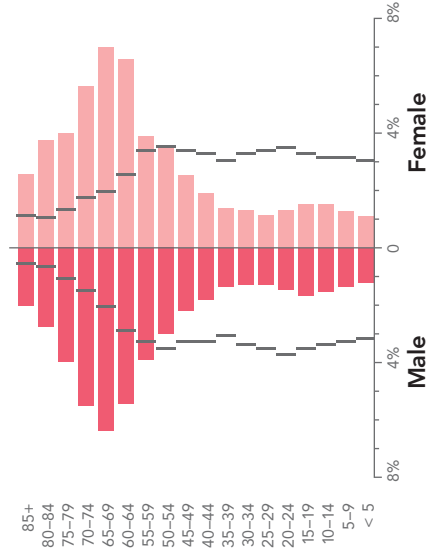
Note: The Index represents the ratio of the segment rate to the US rate multiplied by 100. Consumer preferences are estimated from data by GfK MRI.



## AGE BY SEX (Esri data)

**Median Age: 61.8** US: 37.6

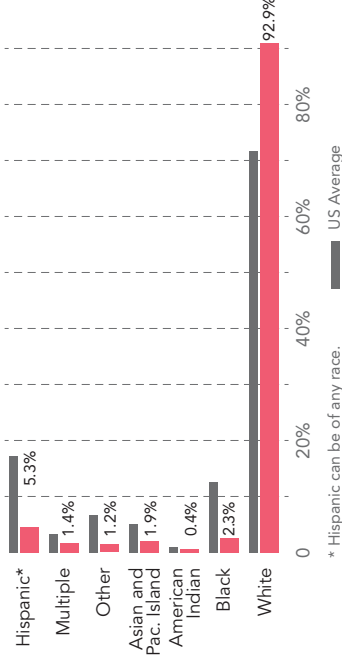
I Indicates US



## RACE AND ETHNICITY (Esri data)

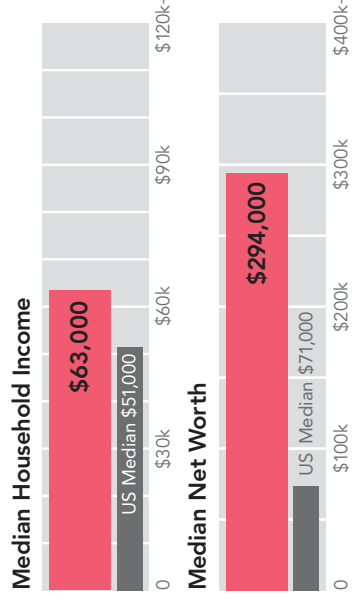
The Diversity Index summarizes racial and ethnic diversity. The index shows the likelihood that two persons, chosen at random from the same area, belong to different race or ethnic groups. The index ranges from 0 (no diversity) to 100 (complete diversity).

**Diversity Index: 22.4** US: 62.1



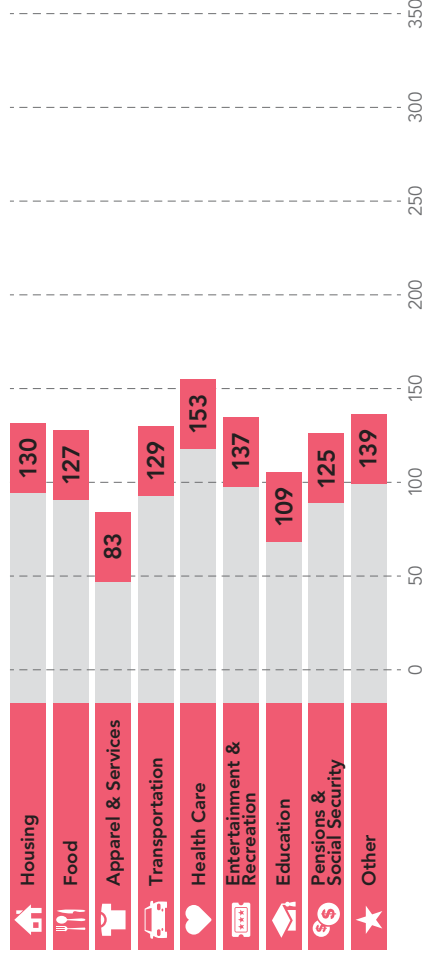
## INCOME AND NET WORTH

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.



## 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.



### MARKET PROFILE

(Consumer preferences are estimated from data by GfK MRI)

- Partial to luxury cars or SUVs; highest demand market for convertibles.
- Active seniors that maintain a regular exercise regimen and pay attention to healthier eating habits.
- Pursue the luxuries that well-funded retirement affords: an active social life, travel, hobbies, and sports (especially golf and boating) and liberal use of home maintenance services to minimize chores.
- Avid readers of newspapers, magazines (sports and travel), and books (audio, e-readers, or tablets).
- Generous supporters of charitable organizations.

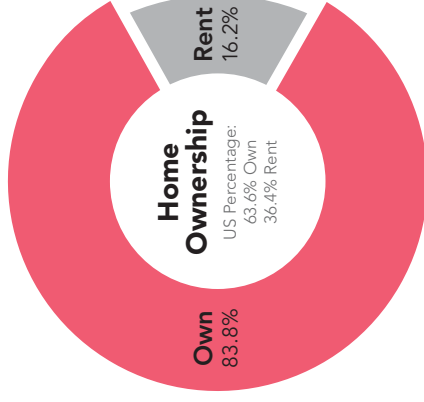
### HOUSING

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.



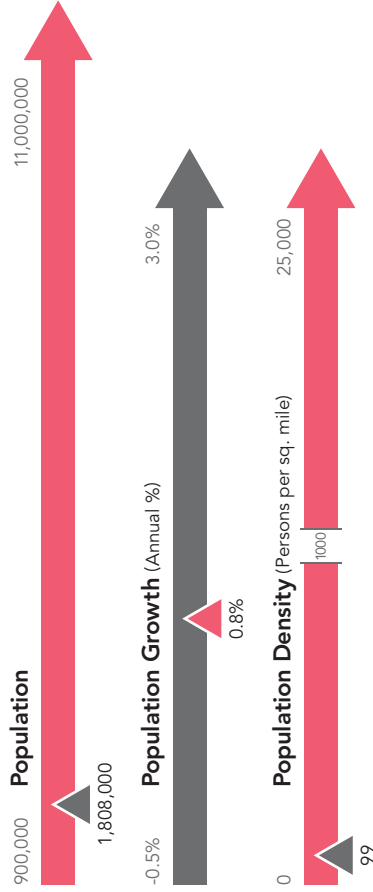
**Typical Housing:**  
Single Family

**Median Value:**  
\$289,000  
US Median: \$177,000



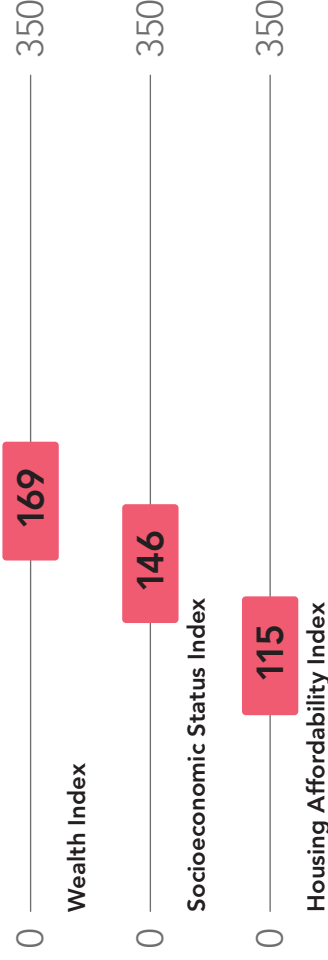
### POPULATION CHARACTERISTICS

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.



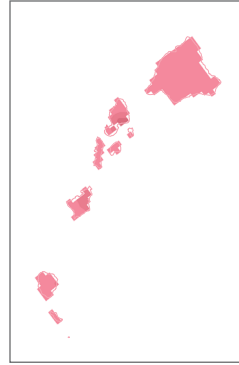
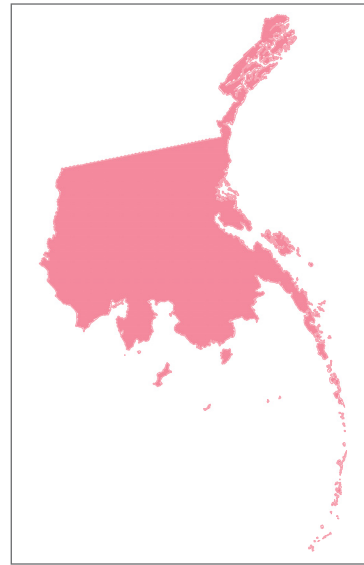
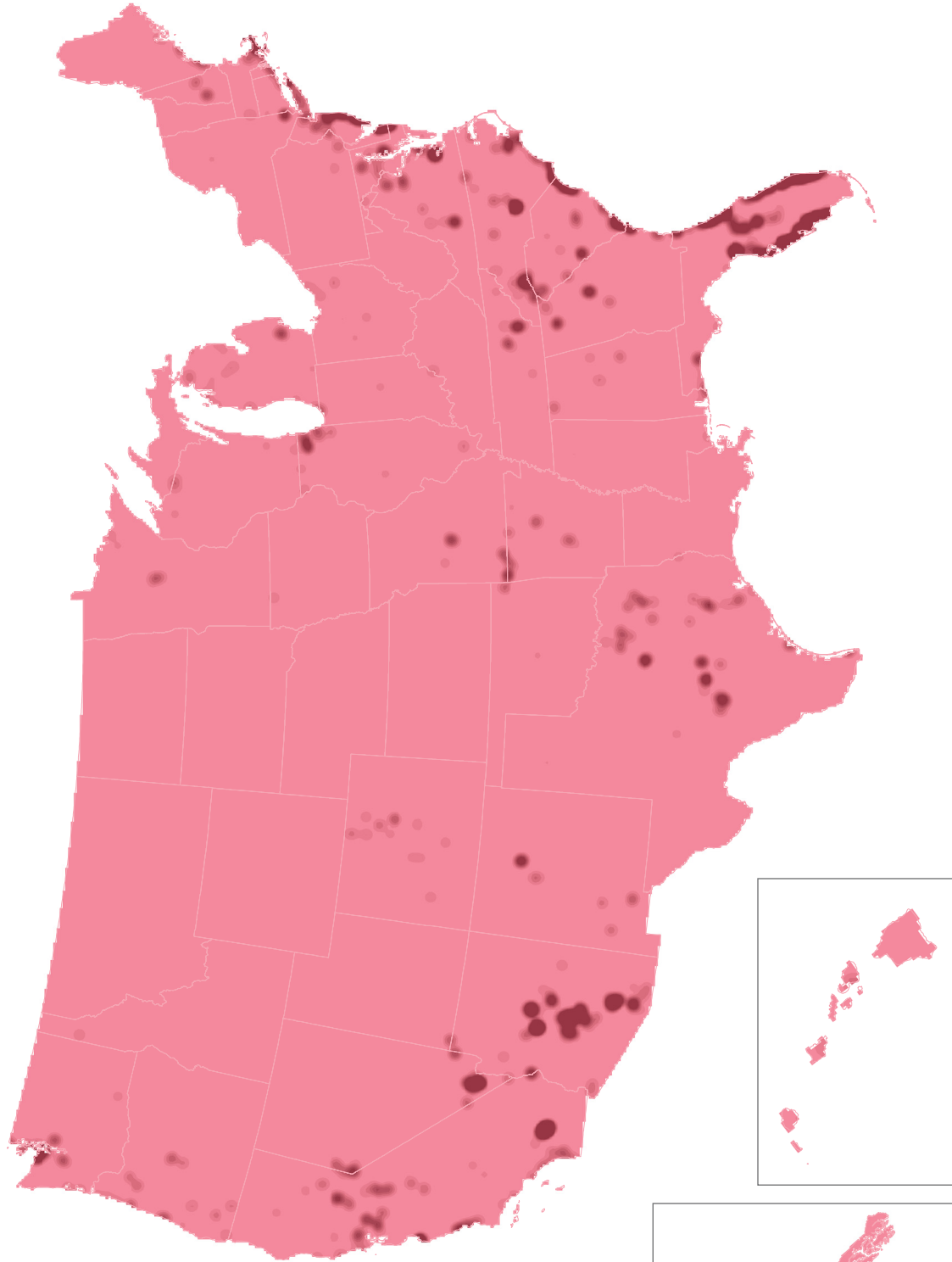
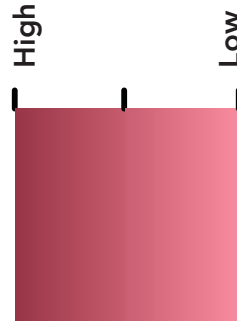


# LifeMode Group: Senior Styles Silver and Gold



## SEGMENT DENSITY

This map illustrates the density and distribution of the *Silver and Gold* Tapestry Segment by households.



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For more information  
1-800-447-9778  
info@esri.com  
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LifeMode Group: Affluent Estates  
**Exurbanites**

1E

Households: 2,320,000

Average Household Size: 2.48

Median Age: 49.6

Median Household Income: \$98,000



## WHO ARE WE?

Ten years later, *Exurbanites* residents are now approaching retirement but showing few signs of slowing down. They are active in their communities, generous in their donations, and seasoned travelers. They take advantage of their proximity to large metropolitan centers to support the arts, but prefer a more expansive home style in less crowded neighborhoods. They have cultivated a lifestyle that is both affluent and urbane.

## OUR NEIGHBORHOOD

- Established neighborhoods (most built between 1970 and 1990) found in the suburban periphery of large metropolitan markets.
- A larger market of empty nesters, married couples with no children; average household size is 2.48.
- Primarily single-family homes with a high median value of \$346,000 (Index 195), most still carrying mortgages.
- Higher vacancy rate at 9%.

## SOCIOECONOMIC TRAITS

- Residents are college educated; more than half have a bachelor's degree or higher; almost 80% have some college education.
- This labor force is beginning to retire. 1 in 3 households currently receive Social Security or retirement income. Labor force participation has declined to less than 60% (Index 94).
- Unemployment remains low at 5.5% (Index 64); more of the residents prefer self-employment (Index 184) or working from home (Index 181).
- Consumers are more interested in quality than cost. They take pride in their homes and foster a sense of personal style.
- *Exurbanites* residents are well connected, using the Internet for everything from shopping to managing their finances.
- Sociable and hardworking, they still find time to stay physically fit.

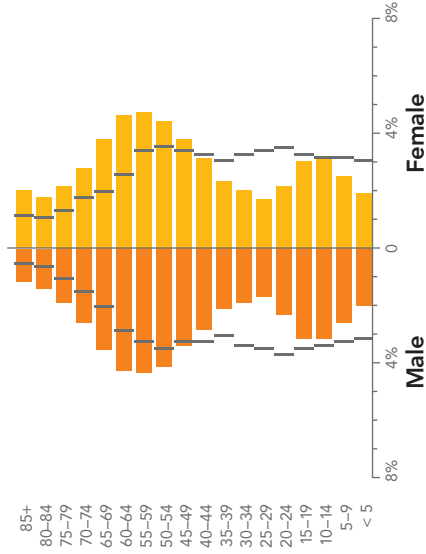


Note: The Index represents the ratio of the segment rate to the US rate multiplied by 100. Consumer preferences are estimated from data by GfK MRI.

## AGE BY SEX (Esri data)

**Median Age: 49.6** US: 37.6

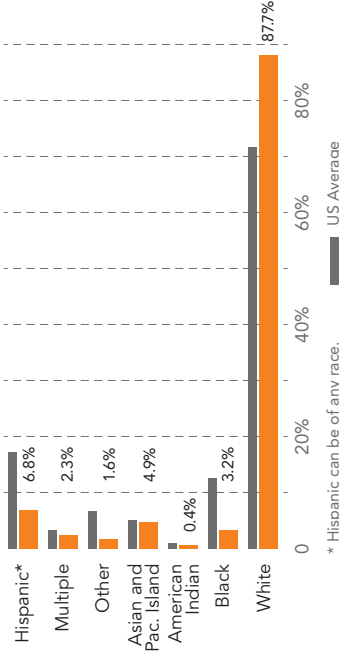
I Indicates US



## RACE AND ETHNICITY (Esri data)

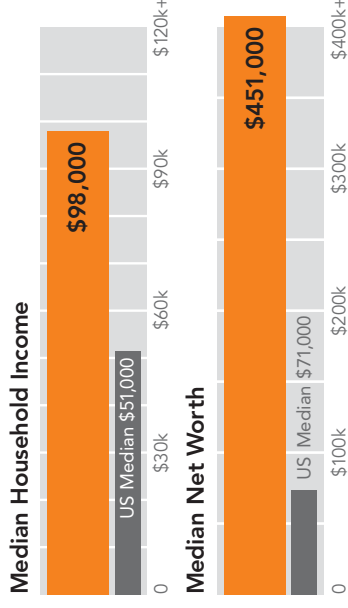
The Diversity Index summarizes racial and ethnic diversity. The index shows the likelihood that two persons, chosen at random from the same area, belong to different race or ethnic groups. The index ranges from 0 (no diversity) to 100 (complete diversity).

**Diversity Index: 32.6** US: 62.1



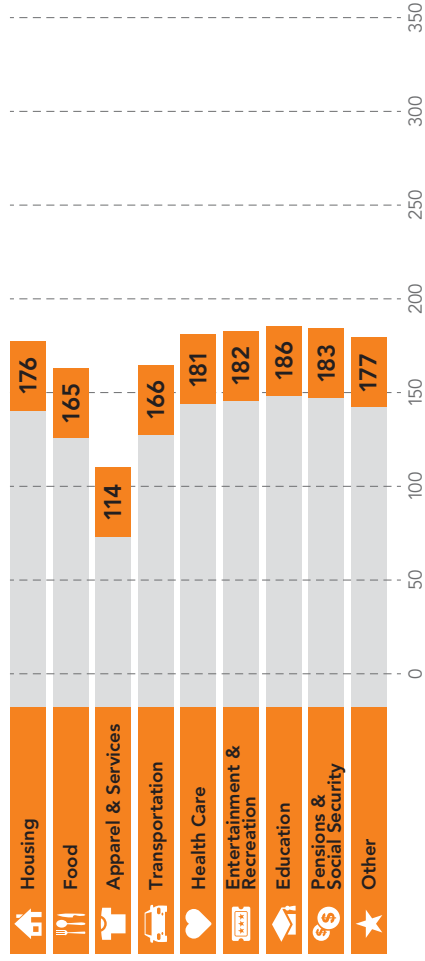
## INCOME AND NET WORTH

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.



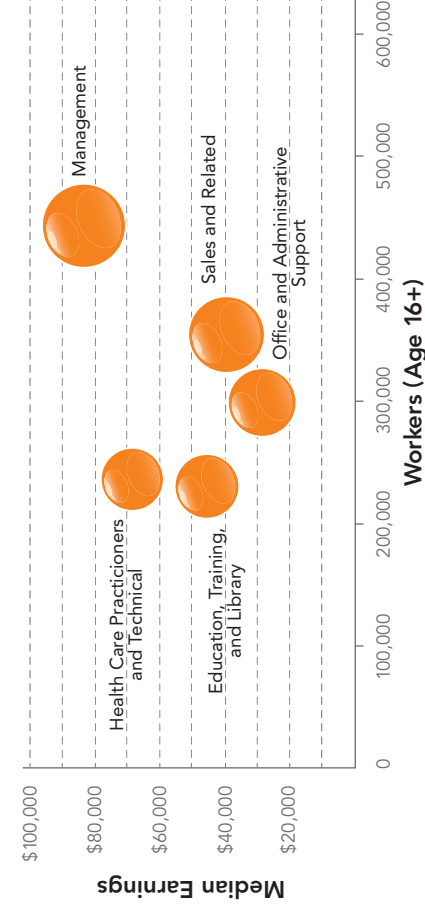
## AVERAGE HOUSEHOLD BUDGET INDEX

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.





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

- Exurbanites residents' preferred vehicles are late model luxury cars or SUVs.
- They are active supporters of the arts and public television/radio.
- Attentive to ingredients, they prefer natural or organic products.
- Gardening and home improvement are priorities, but they also use a number of services, from home care and maintenance to personal care.
- Financially active with wide-ranging investments, these investors rely on financial planners, extensive reading, and the Internet to handle their money.

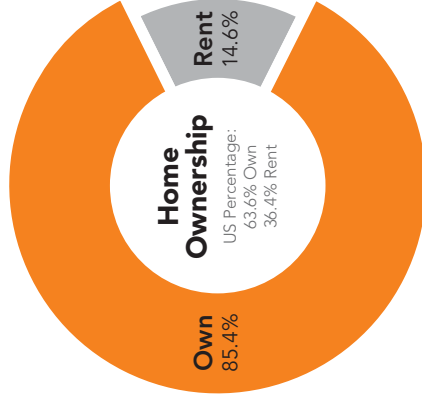
## HOUSING

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.



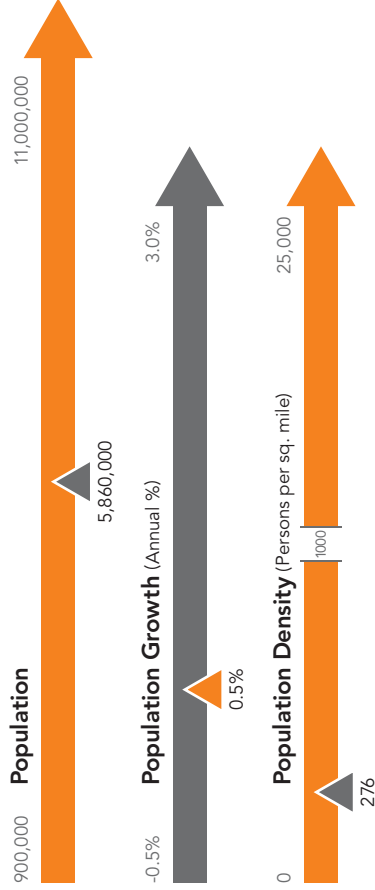
**Typical Housing:**  
 Single Family

**Median Value:**  
 \$346,000  
 US Median: \$177,000



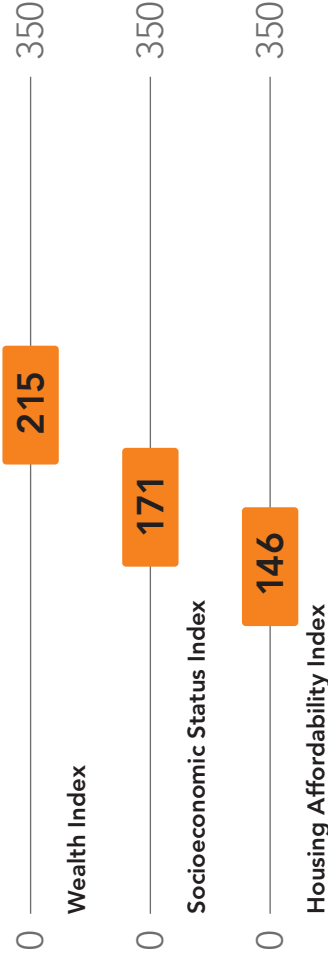
## POPULATION CHARACTERISTICS

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.



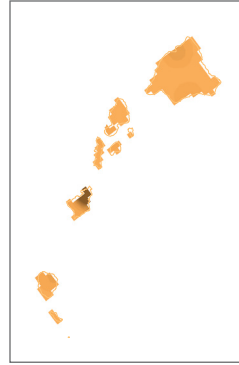
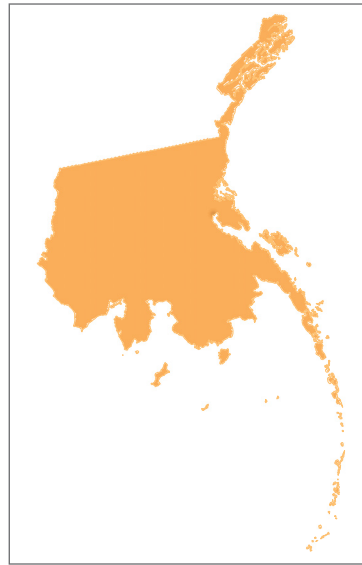
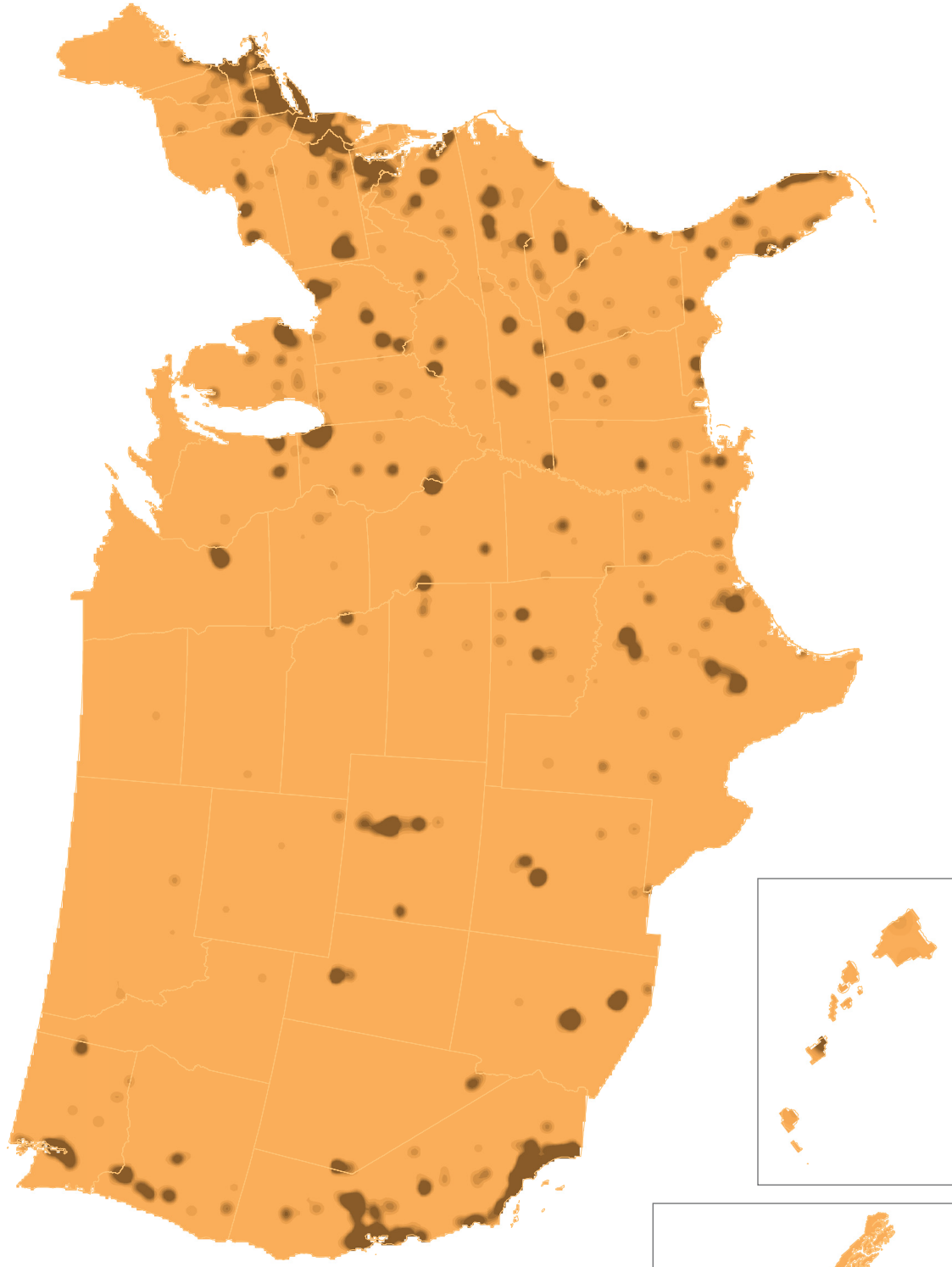
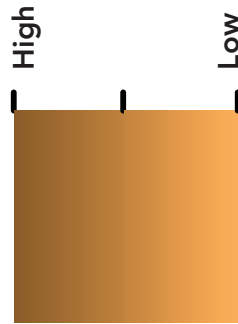


# LifeMode Group: Affluent Estates Exurbanites



## SEGMENT DENSITY

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



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# LifeMode Group: Affluent Estates Top Tier

1A

Households: 2,052,000

Average Household Size: 2.82

Median Age: 46.2

Median Household Income: \$157,000



## WHO ARE WE?

The residents of the wealthiest Tapestry market, *Top Tier*, earn more than three times the US household income. They have the purchasing power to indulge any choice, but what do their hearts' desire? Aside from the obvious expense for the upkeep of their lavish homes, consumers select upscale salons, spas, and fitness centers for their personal well-being and shop at high-end retailers for their personal effects. Whether short or long, domestic or foreign, their frequent vacations spare no expense. Residents fill their weekends and evenings with opera, classical music concerts, charity dinners, and shopping. These highly educated professionals have reached their corporate career goals. With an accumulated average net worth of over 1.5 million dollars and income from a strong investment portfolio, many of these older residents have moved into consulting roles or operate their own businesses.

## OUR NEIGHBORHOOD

- Married couples without children or married couples with older children dominate this market.
- Housing units are owner occupied with the highest home values—and above average use of mortgages.
- Neighborhoods are older and located in the suburban periphery of the largest metropolitan areas, especially along the coasts.

## SOCIOECONOMIC TRAITS

- *Top Tier* is a highly educated, successful consumer market: more than one in three residents has a postgraduate degree.
- Annually, they earn more than three times the US median household income, primarily from wages and salary, but also self-employment income (Index 177) and investments (Index 242).
- These are the nation's wealthiest consumers. They hire financial advisers to manage their diverse investment portfolios but stay abreast of current financial trends and products.
- Socially responsible consumers who aim for a balanced lifestyle, they are goal oriented and hardworking but make time for their kids or grandkids and maintain a close-knit group of friends.
- These busy consumers seek variety in life. They take an interest in the fine arts; read to expand their knowledge; and consider the Internet, radio, and newspapers as key media sources.
- They regularly cook their meals at home, attentive to good nutrition and fresh organic foods.



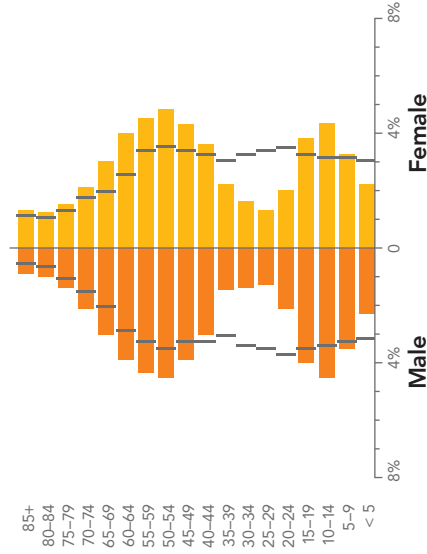
Note: The Index represents the ratio of the segment rate to the US rate multiplied by 100. Consumer preferences are estimated from data by GfK MRI.



## AGE BY SEX (Esri data)

**Median Age: 46.2** US: 37.6

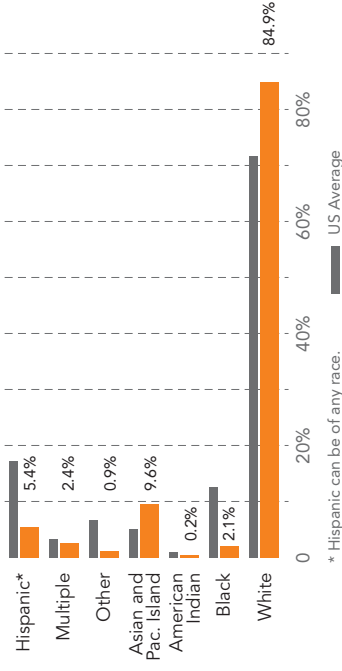
I Indicates US



## RACE AND ETHNICITY (Esri data)

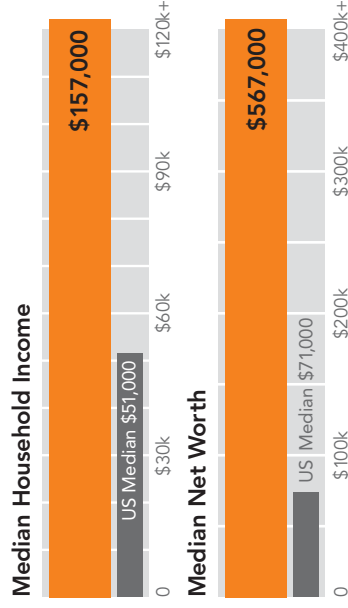
The Diversity Index summarizes racial and ethnic diversity. The index shows the likelihood that two persons, chosen at random from the same area, belong to different race or ethnic groups. The index ranges from 0 (no diversity) to 100 (complete diversity).

**Diversity Index: 34.4** US: 62.1



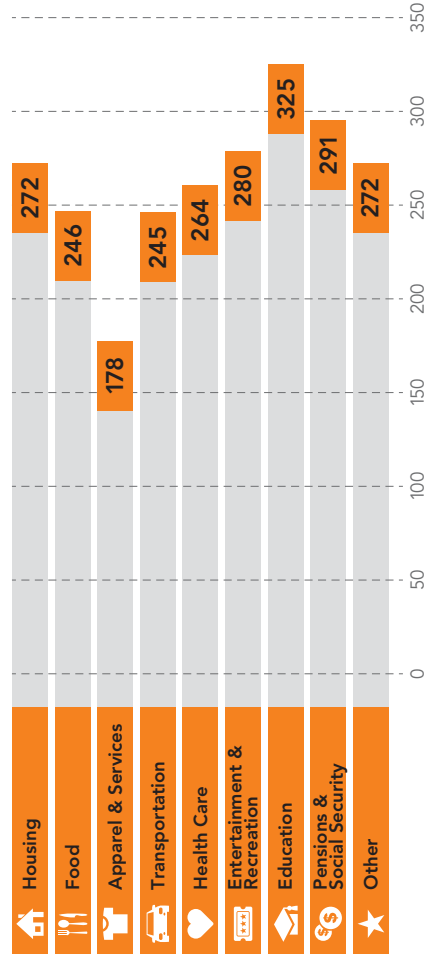
## INCOME AND NET WORTH

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.



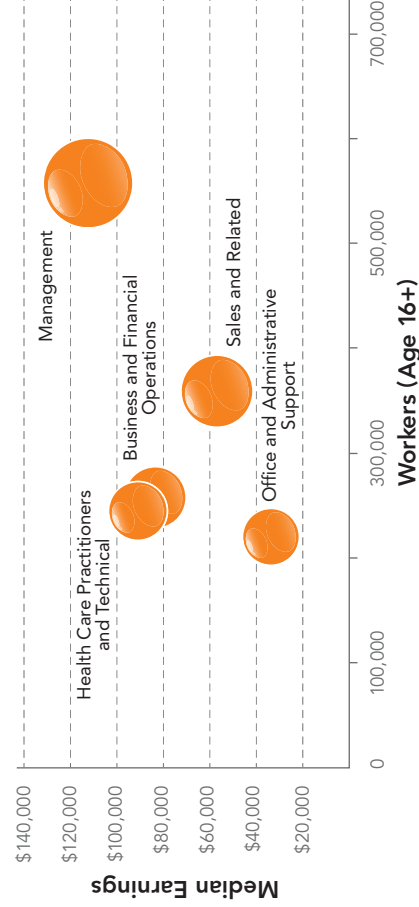
## AVERAGE HOUSEHOLD BUDGET INDEX

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.



## MARKET PROFILE

(Consumer preferences are estimated from data by GfK MRI)

- They purchase or lease luxury cars with the latest trim, preferably imports.
- They contribute to arts/cultural organizations, educational and social groups, as well as NPR and PBS.
- Top Tier residents farm out their household chores—every service from property and garden maintenance and professional housekeeping to contracting for home improvement or maintenance projects.
- Consumers spend money on themselves; they frequently visit day spas and salons, use dry cleaning services, and exercise at exclusive clubs.
- Near or far, downtown or at the beach, they regularly visit their lavish vacation homes.
- When at home, their schedules are packed with lunch dates, book club meetings, charity dinners, classical music concerts, opera shows, and visits to local art galleries.
- Top Tier consumers are shoppers. They shop at high-end retailers such as Nordstrom (readily paying full price), as well as Target, Kohl's, Macy's, and Bed Bath & Beyond, and online at Amazon.com.
- At their level of spending, it makes sense to own an airline credit card. They make several domestic and foreign trips a year for leisure and pay for every luxury along the way—a room with a view, limousines, and rental cars are part of the package.

## HOUSING

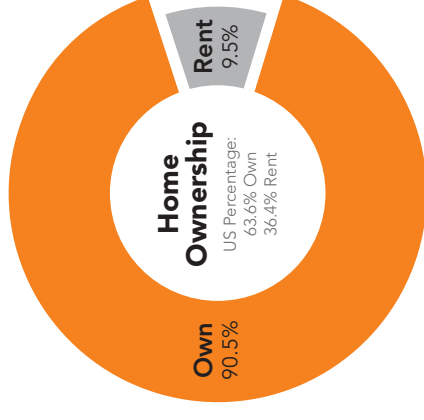
Median home value is displayed for markets that are primarily owner occupied; average rent is shown for renter-occupied markets. Tenure and home value are estimated by Esri. Housing type and average rent are from the Census Bureau's American Community Survey.



**Typical Housing:**  
Single Family

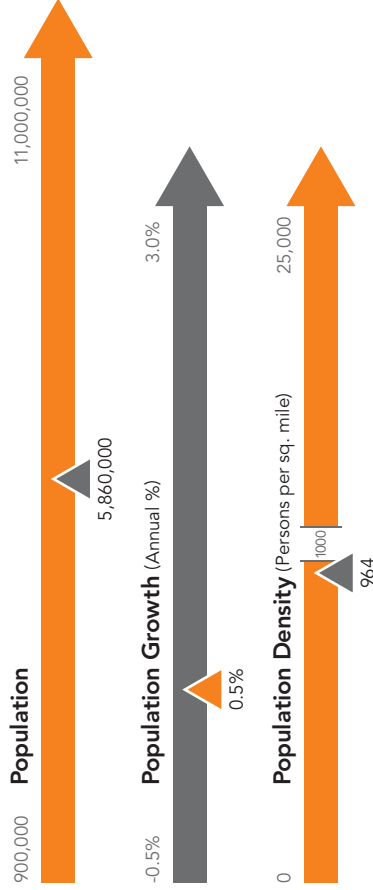
**Median Value:**  
\$666,000

US Median: \$177,000



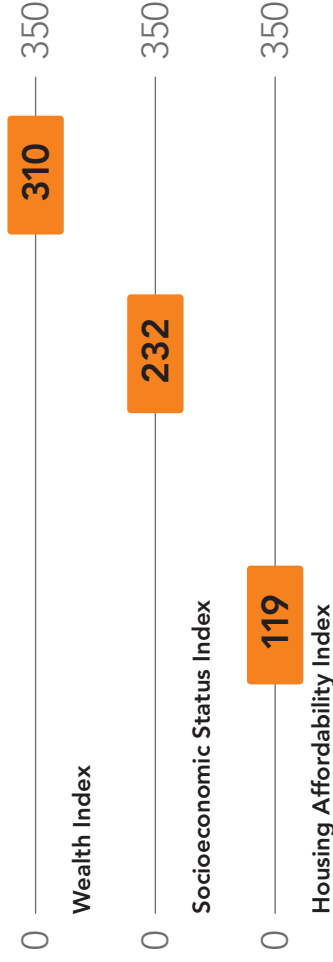
## POPULATION CHARACTERISTICS

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.



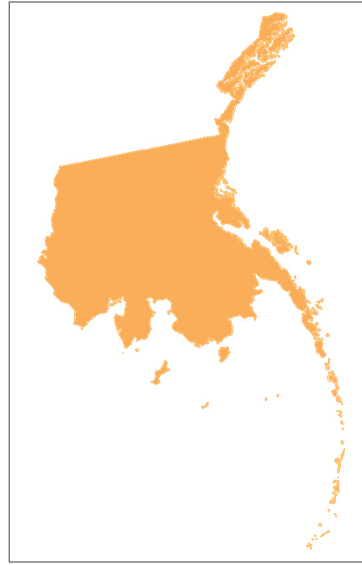
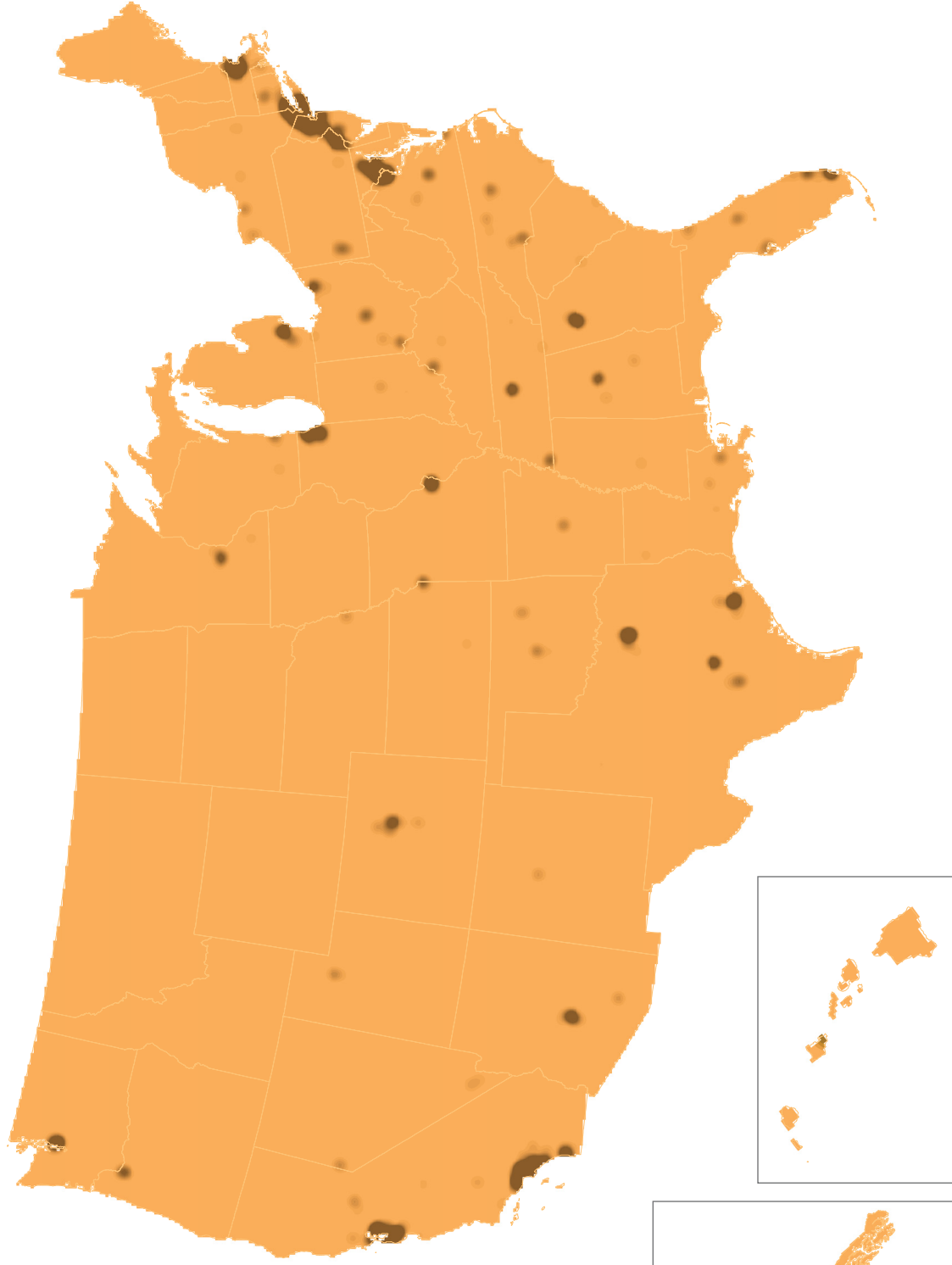
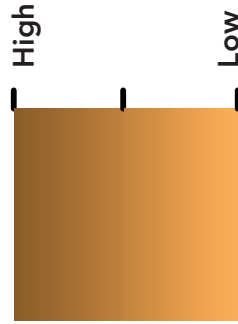


# LifeMode Group: Affluent Estates Top Tier



## SEGMENT DENSITY

This map illustrates the density and distribution of the *Top Tier* Tapestry Segment by households.



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LifeMode Group: Affluent Estates

# Professional Pride

Households: 1,878,000

Average Household Size: 3.11

Median Age: 40.5

Median Household Income: \$127,000

1B



## 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

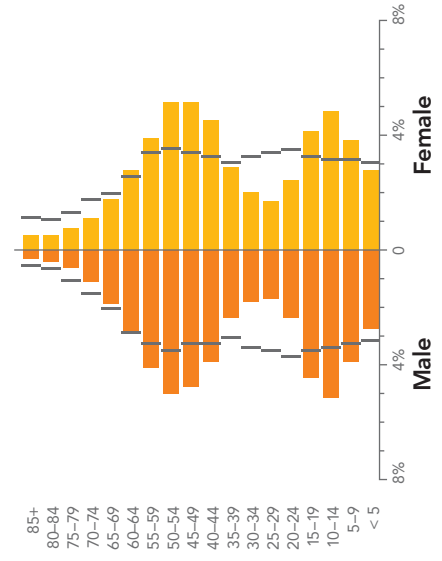
- Professional Pride consumers are highly qualified in the science, technology, law, or finance fields; they've worked hard to build their professional reputation or their start-up businesses.
- These consumers are willing to risk their accumulated wealth in the stock market.
- They have a preferred 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 ratio of the segment rate to the US rate multiplied by 100. Consumer preferences are estimated from data by GfK MRI.

### AGE BY SEX (Esri data)

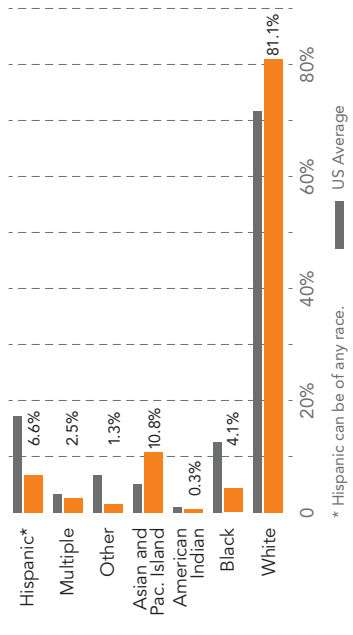
**Median Age: 40.5** US: 37.6  
I Indicates US



### RACE AND ETHNICITY (Esri data)

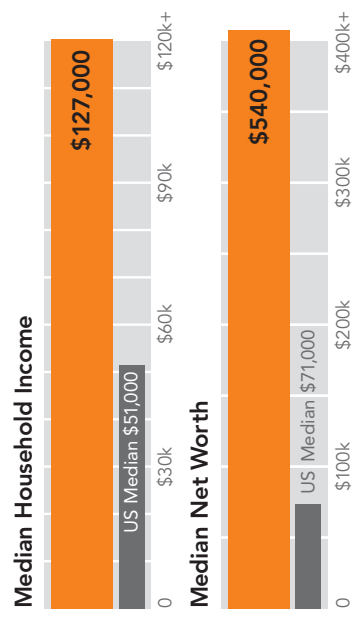
The Diversity Index summarizes racial and ethnic diversity. The index shows the likelihood that two persons, chosen at random from the same area, belong to different race or ethnic groups. The index ranges from 0 (no diversity) to 100 (complete diversity).

**Diversity Index: 41.2** US: 62.1



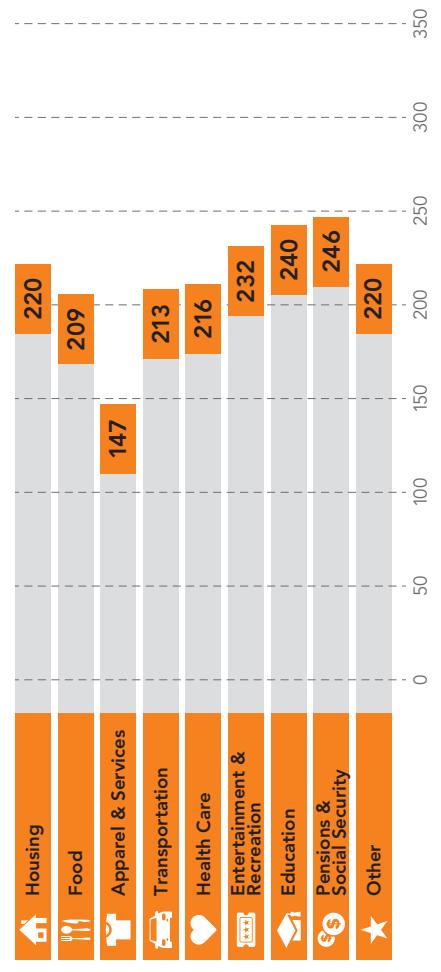
### INCOME AND NET WORTH

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.



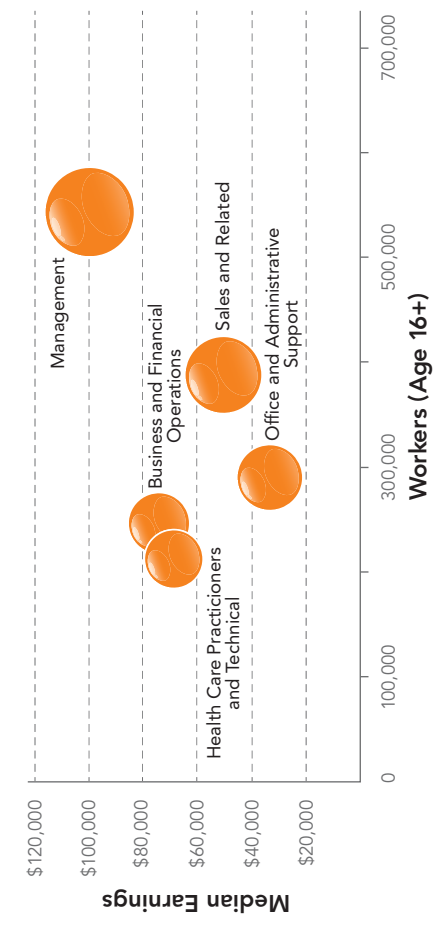
### AVERAGE HOUSEHOLD BUDGET INDEX

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.





## MARKET PROFILE

(Consumer preferences are estimated from data by GfK MRI)

- 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.

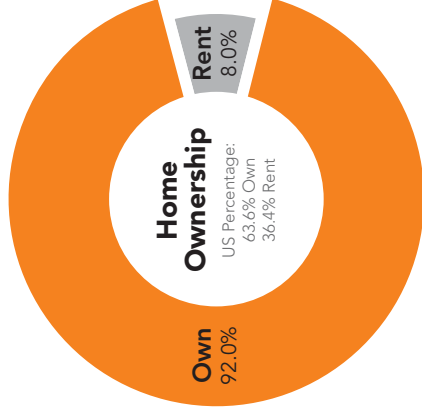
## HOUSING

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.



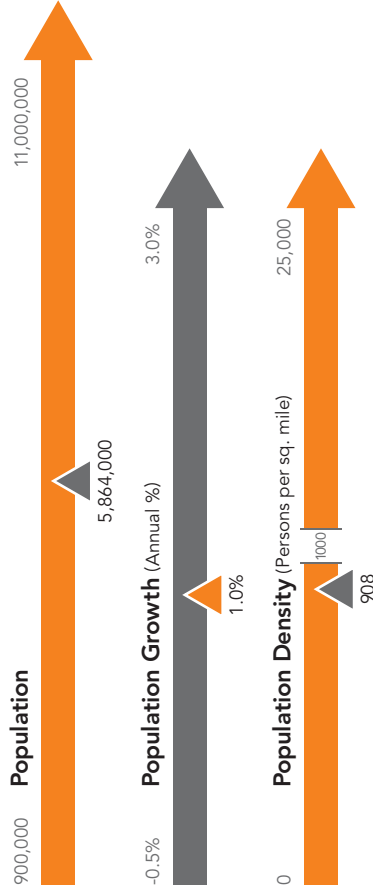
**Typical Housing:**  
 Single Family

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



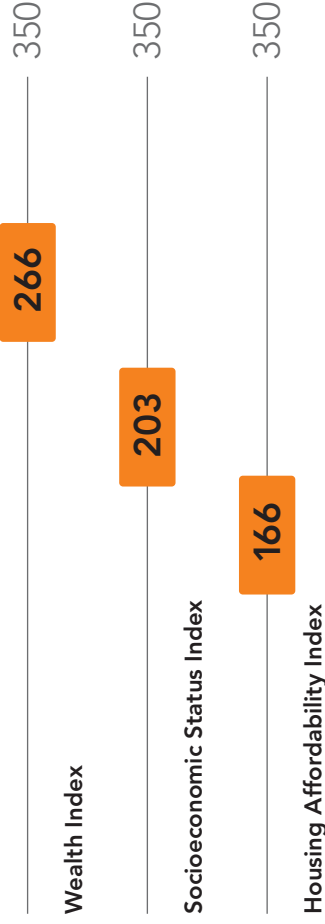
## POPULATION CHARACTERISTICS

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.



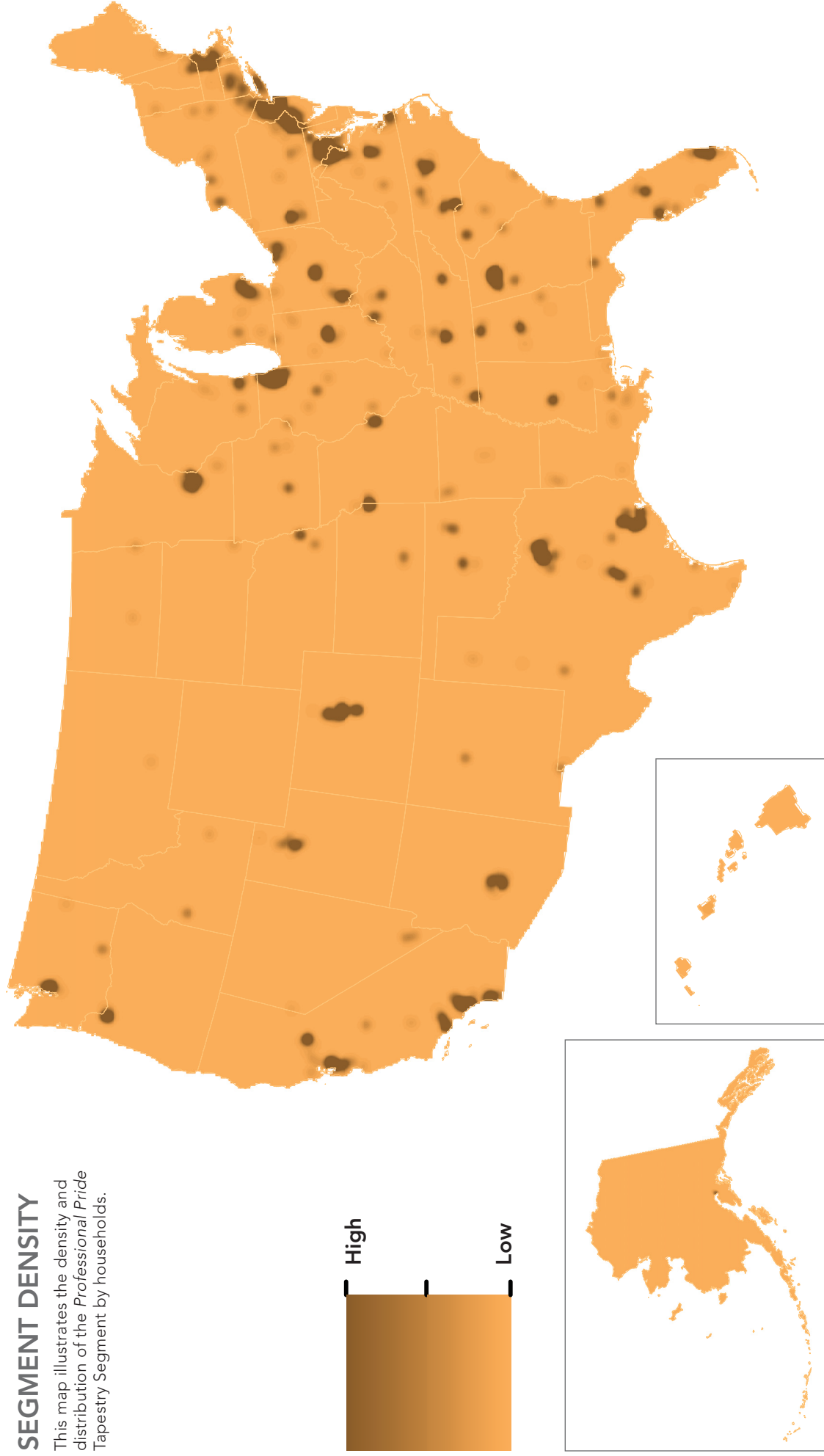
## ESRI INDEXES

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



## SEGMENT DENSITY

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



LifeMode Group: Affluent Estates

# Savvy Suburbanites

Households: 3,543,000

Average Household Size: 2.83

Median Age: 44.1

Median Household Income: \$104,000



## WHO ARE WE?

Savvy Suburbanites residents are well educated, well read, and well capitalized. Families include empty nesters and empty nester wannabes, who still have adult children at home. Located in older neighborhoods outside the urban core, their suburban lifestyle includes home remodeling and gardening plus the active pursuit of sports and exercise. They enjoy good food and wine, plus the amenities of the city's cultural events.

## OUR NEIGHBORHOOD

- Established neighborhoods (most built between 1970 and 1990) found in the suburban periphery of large metropolitan markets.
- Married couples with no children or older children; average household size is 2.83.
- 91% owner occupied; 71% mortgaged (Index 156).
- Primarily single-family homes, with a median value of \$311,000 (Index 175).
- Low vacancy rate at 4.5%.

## SOCIOECONOMIC TRAITS

- Education: 48.1% college graduates; 76.1% with some college education.
- Low unemployment at 5.8% (Index 67); higher labor force participation rate at 68.5% (Index 109) with proportionately more 2-worker households at 65.4%, (Index 122).
- Well-connected consumers that appreciate technology and make liberal use of it for everything from shopping and banking to staying current and communicating.
- Informed shoppers that do their research prior to purchasing and focus on quality.



Note: The Index represents the ratio of the segment rate to the US rate multiplied by 100. Consumer preferences are estimated from data by GfK MRI.





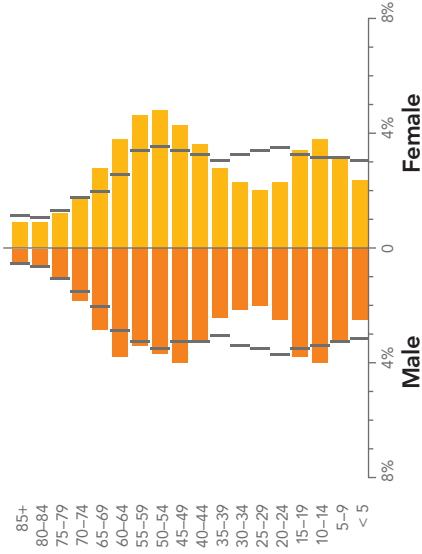
# LifeMode Group: Affluent Estates Savvy Suburbanites



## AGE BY SEX (Esri data)

**Median Age: 44.1** US: 37.6

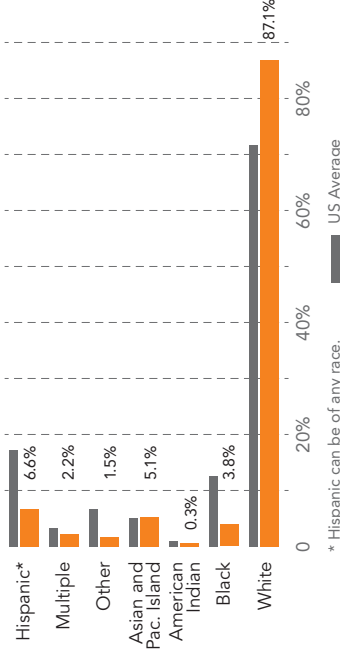
I Indicates US



## RACE AND ETHNICITY (Esri data)

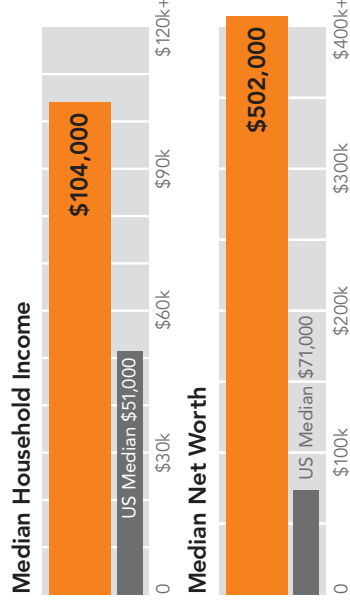
The Diversity Index summarizes racial and ethnic diversity. The index shows the likelihood that two persons, chosen at random from the same area, belong to different race or ethnic groups. The index ranges from 0 (no diversity) to 100 (complete diversity).

**Diversity Index: 33.2** US: 62.1



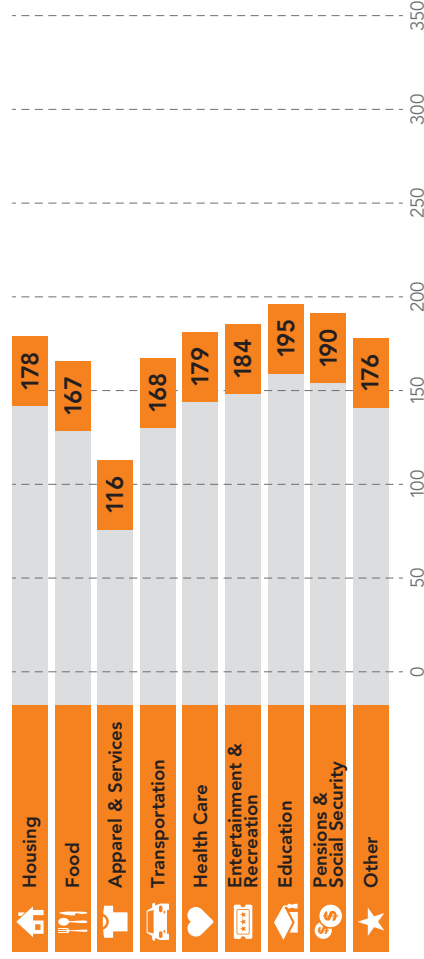
## INCOME AND NET WORTH

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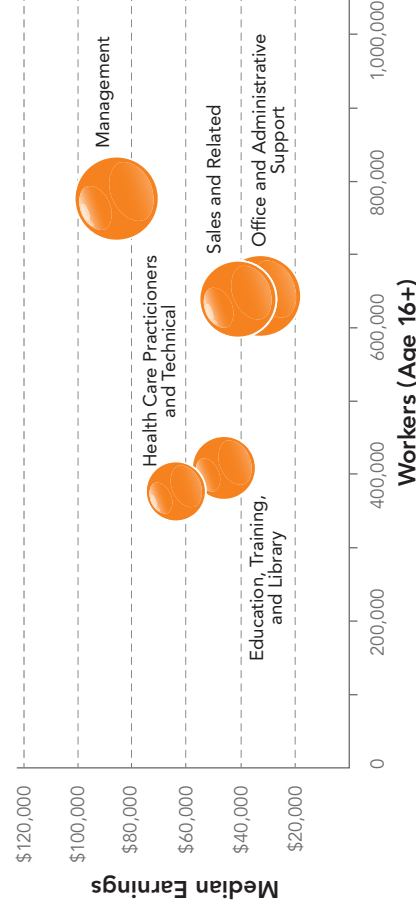
## AVERAGE HOUSEHOLD BUDGET INDEX

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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.





## MARKET PROFILE

(Consumer preferences are estimated from data by GfK MRI)

- Residents prefer late model, family-oriented vehicles: SUVs, minivans, and station wagons.
- Gardening and home remodeling are priorities, usually DIY. Riding mowers and power tools are popular, although they also hire contractors for the heavy lifting.
- There is extensive use of housekeeping and personal care services.
- Foodies: They like to cook and prefer natural or organic products.
- These investors are financially active, using a number of resources for informed investing. They are not afraid of debt; many households carry first and second mortgages, plus home equity credit lines.
- Physically fit, residents actively pursue a number of sports, from skiing to golf, and invest heavily in sports gear and exercise equipment.

## 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.



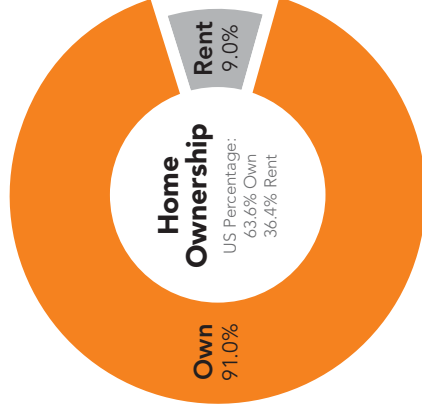
### Typical Housing:

Single Family

### Median Value:

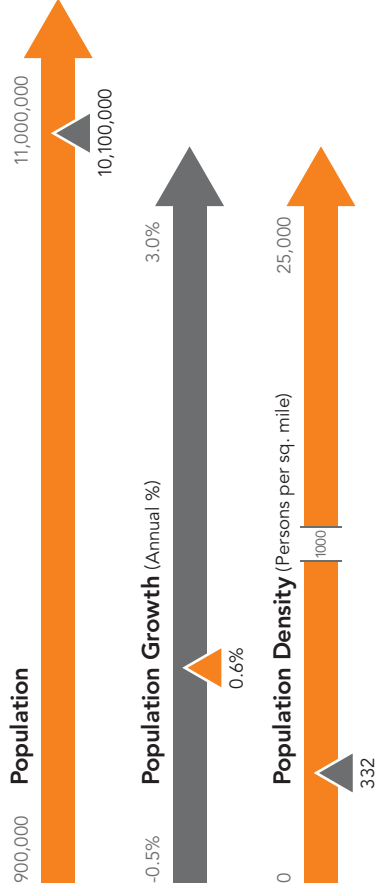
\$311,000

US Median: \$177,000



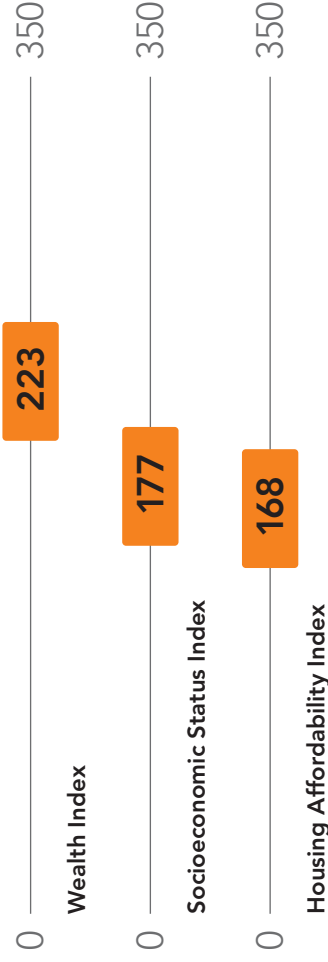
## POPULATION CHARACTERISTICS

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.





LifeMode Group: Affluent Estates

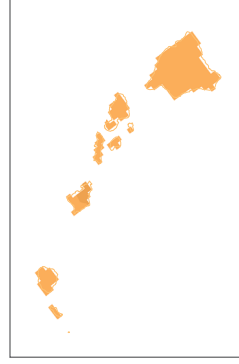
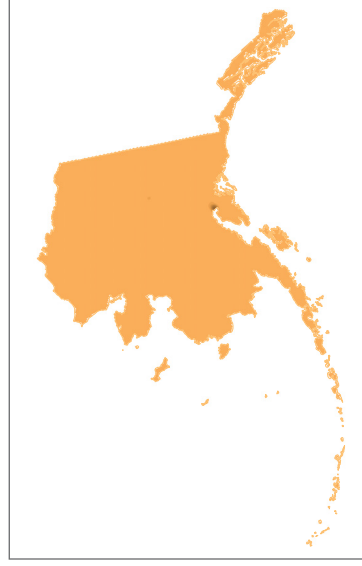
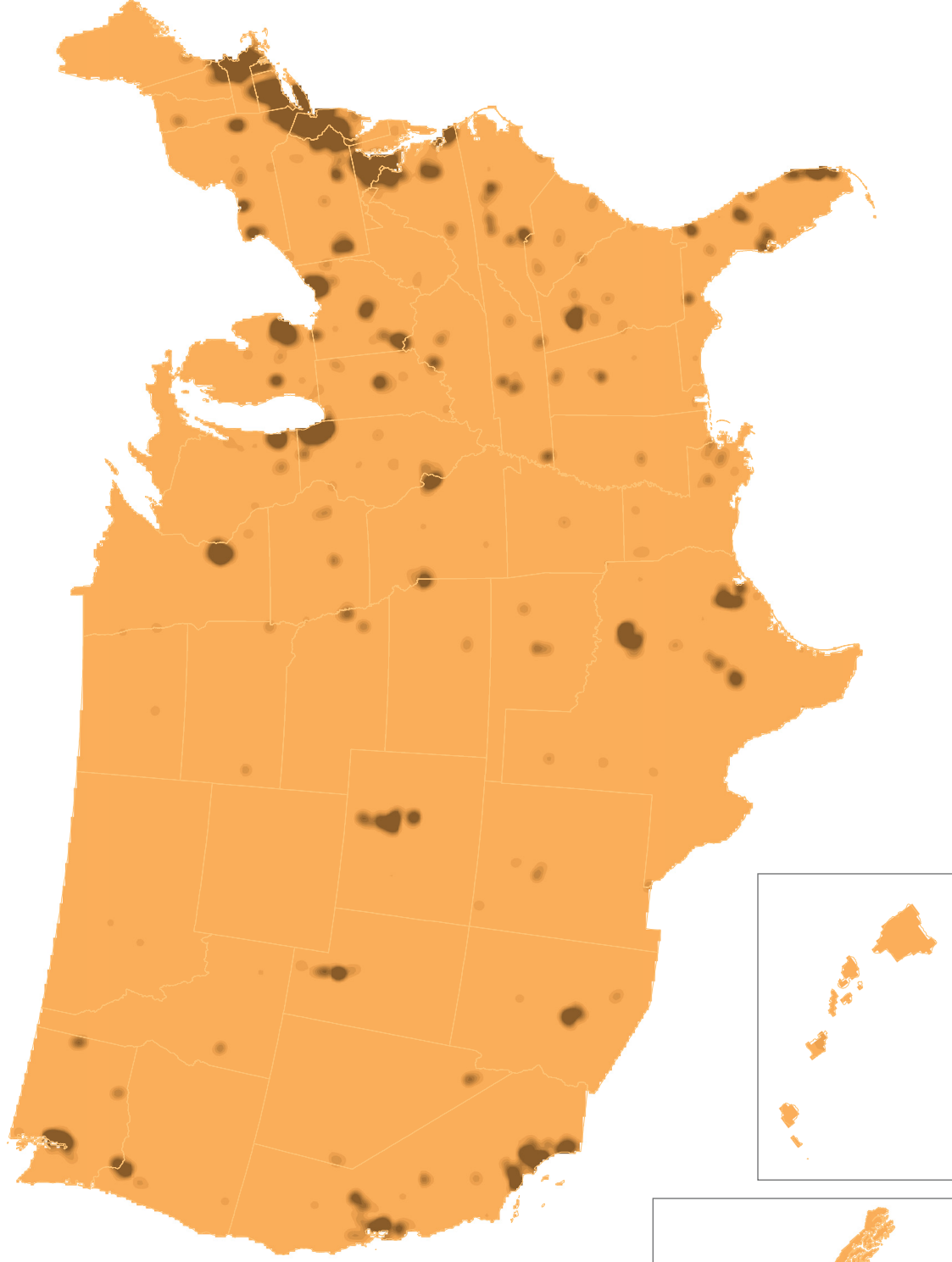
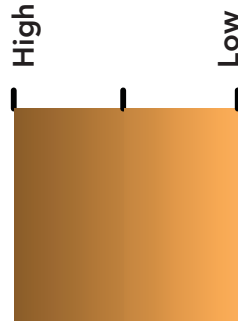
# Savvy Suburbanites



esri.com/tapestry

## SEGMENT DENSITY

This map illustrates the density and distribution of the Savvy Suburbanites Tapestry Segment by households.



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For more information  
1-800-447-9778  
info@esri.com  
esri.com





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).



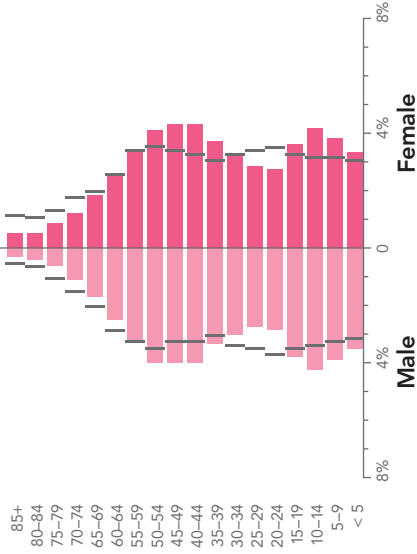
**TAPESTRY**  
**SEGMENTATION**  
[esri.com/tapestry](http://esri.com/tapestry)

Note: The Index represents the ratio of the segment rate to the US rate multiplied by 100. Consumer preferences are estimated from data by GfK MRI.

### AGE BY SEX (Esri data)

**Median Age: 36.6** US: 37.6

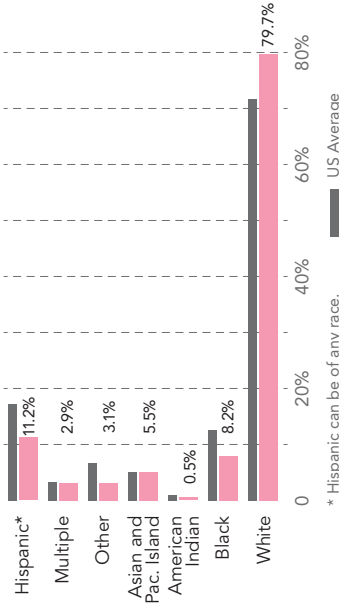
I Indicates US



### RACE AND ETHNICITY (Esri data)

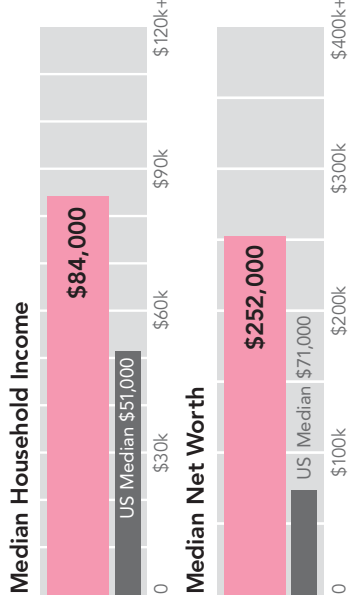
The Diversity Index summarizes racial and ethnic diversity. The index shows the likelihood that two persons, chosen at random from the same area, belong to different race or ethnic groups. The index ranges from 0 (no diversity) to 100 (complete diversity).

**Diversity Index: 48.3** US: 62.1



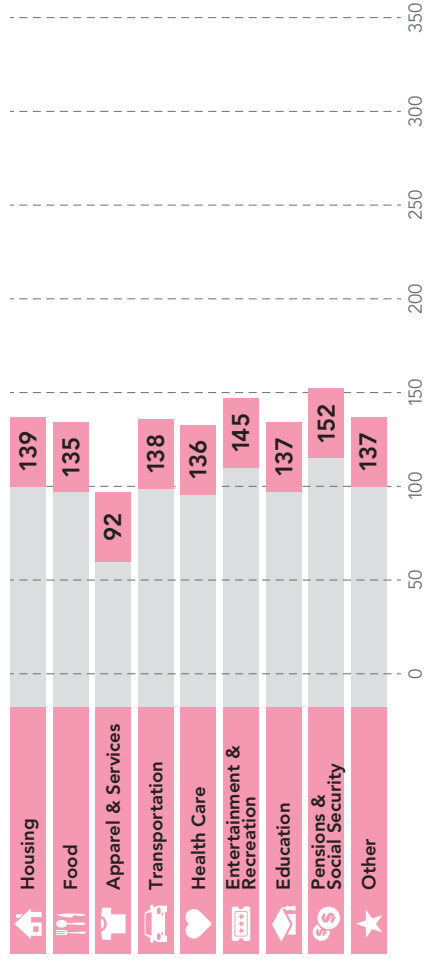
### INCOME AND NET WORTH

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.

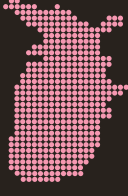


### OCCUPATION BY EARNINGS

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.







## MARKET PROFILE

(Consumer preferences are estimated from data by GfK MRI)

- 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.

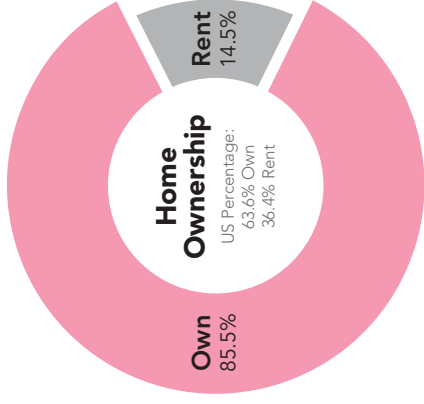
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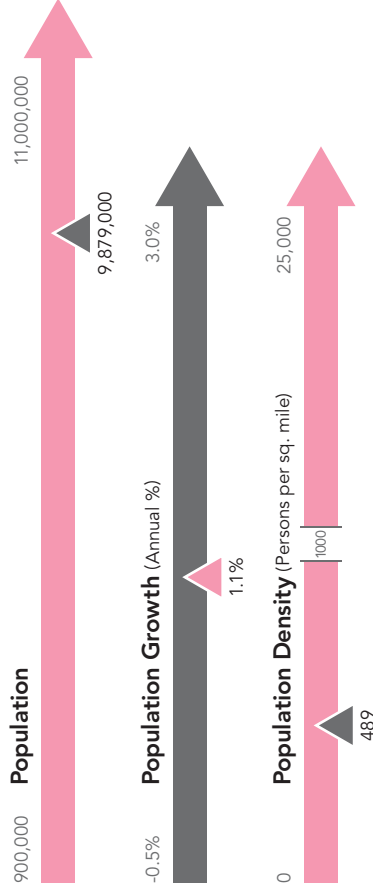
**Typical Housing:**  
 Single Family

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



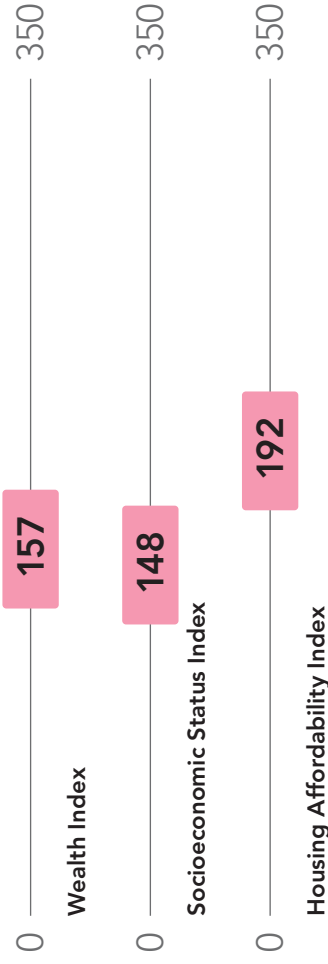
## POPULATION CHARACTERISTICS

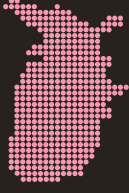
Total population, average annual population change since Census 2010, and average density (population per square mile) are displayed for the market relative to the size and change among all Tapestry markets. Data estimated by Esri.



## ESRI INDEXES

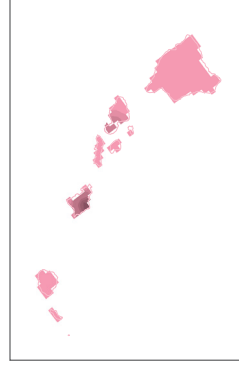
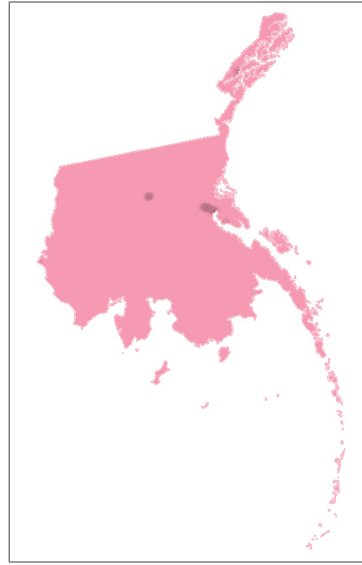
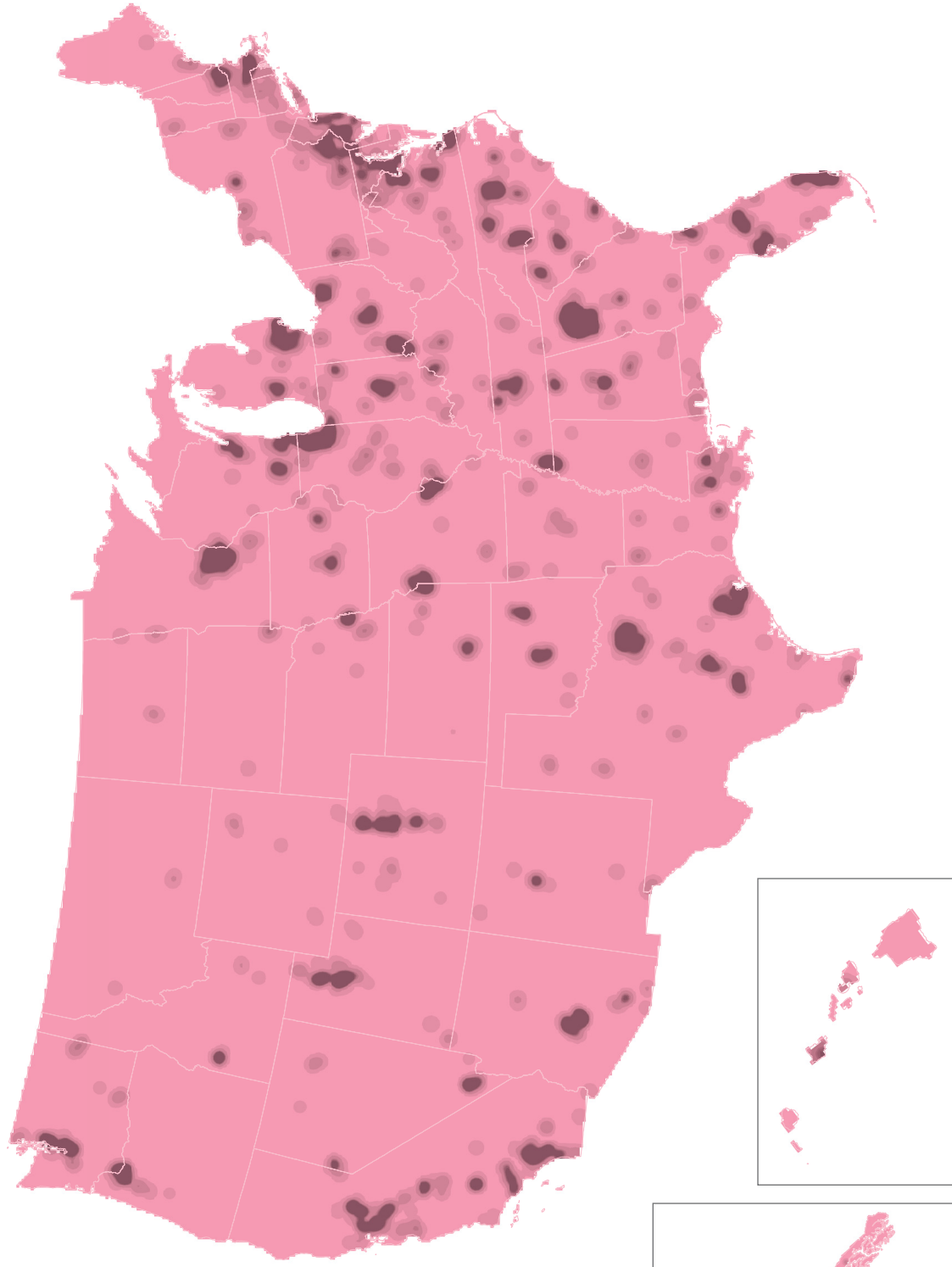
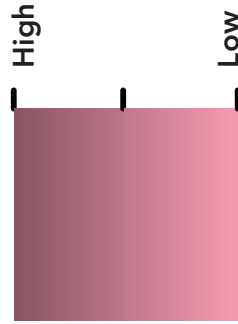
Esri developed three indexes to display average household wealth, socioeconomic status, and housing affordability for the market relative to US standards.





### SEGMENT DENSITY

This map illustrates the density and distribution of the Soccer Moms Tapestry Segment by households.



LifeMode Group: Upscale Avenues  
**Urban Chic**

2A

Households: 1,574,000

Average Household Size: 2.37

Median Age: 42.6

Median Household Income: \$98,000



## WHO ARE WE?

Urban Chic residents are professionals that live a sophisticated, exclusive lifestyle. Half of all households are occupied by married-couple families and about 30% are singles. These are busy, well-connected, and well-educated consumers—avid readers and moviegoers, environmentally active, and financially stable. This market is a bit older, with a median age of almost 43 years, and growing slowly, but steadily.

## OUR NEIGHBORHOOD

- More than half of Urban Chic households include married couples; 30% are singles.
- Average household size is slightly lower at 2.37.
- Homes range from prewar to recent construction, high-rise to single family. Over 60% of householders live in single-family homes; more than one in four live in multiunit structures.
- Two-thirds of homes are owner occupied.
- Major concentrations of these neighborhoods are found in the suburban periphery of large metropolitan areas on the California coast and along the East Coast.
- Most households have two vehicles available. Commuting time is slightly longer, but commuting by bicycle is common (Index 236).

## SOCIOECONOMIC TRAITS

- Well educated, more than 60% of residents hold a bachelor's degree or higher (Index 223).
- Unemployment rate is well below average at 5% (Index 62); labor force participation is higher at 69%.
- Residents are employed in white collar occupations—in managerial, technical, and legal positions.
- Over 40% of households receive income from investments.
- Environmentally aware, residents actively recycle and maintain a “green” lifestyle.
- These busy, tech-savvy residents use PCs extensively for an array of activities such as shopping, banking, and staying current—a top market for Apple computers.



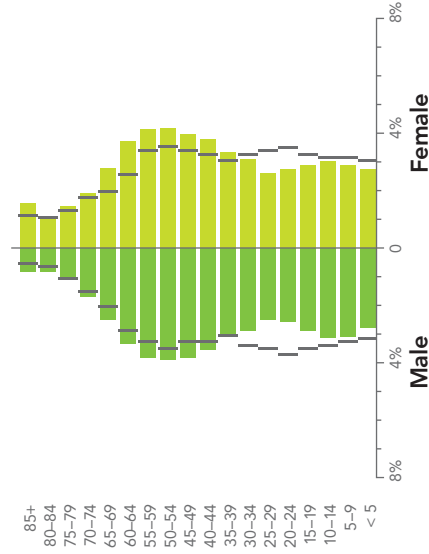
Note: The Index represents the ratio of the segment rate to the US rate multiplied by 100. Consumer preferences are estimated from data by GfK MRI.



## AGE BY SEX (Esri data)

**Median Age: 42.6** US: 37.6

I Indicates US



## RACE AND ETHNICITY (Esri data)

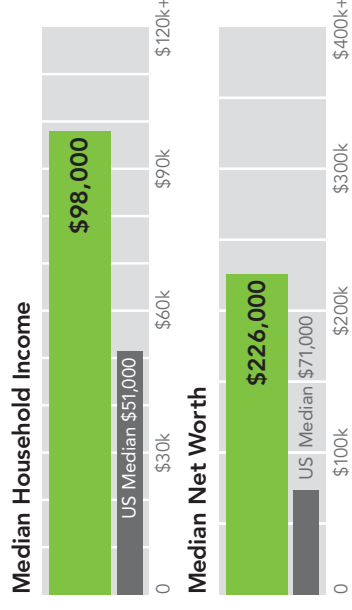
The Diversity Index summarizes racial and ethnic diversity. The index shows the likelihood that two persons, chosen at random from the same area, belong to different race or ethnic groups. The index ranges from 0 (no diversity) to 100 (complete diversity).

**Diversity Index: 45.2** US: 62.1



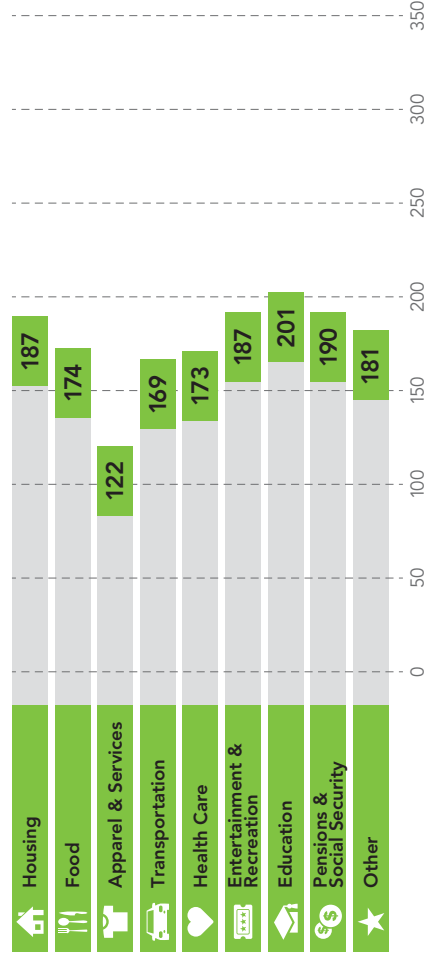
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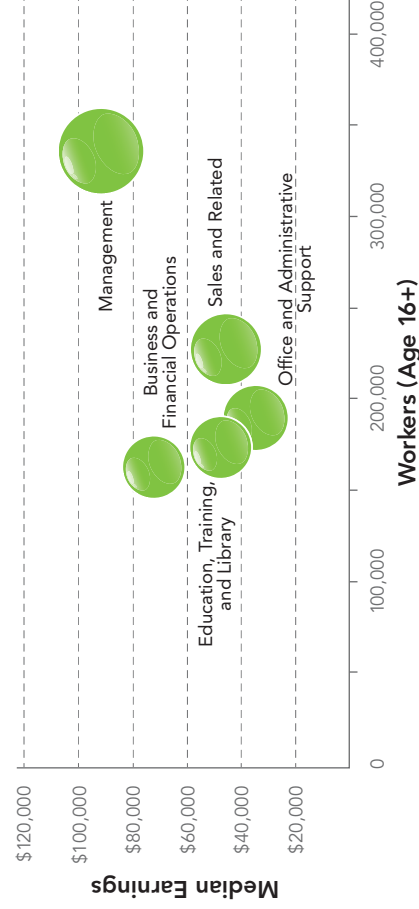
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## OCCUPATION BY EARNINGS

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.



## MARKET PROFILE

(Consumer preferences are estimated from data by GfK MRI)

- Shop at Trader Joe's, Costco, or Whole Foods.
- Eat organic foods, drink imported wine, and truly appreciate a good cup of coffee.
- Travel extensively (domestically and internationally).
- Prefer to drive luxury imports and shop at upscale establishments.
- Embrace city life by visiting museums, art galleries, and movie theaters for a night out.
- Avid book readers of both digital and audio formats.
- Financially shrewd residents that maintain a healthy portfolio of stocks, bonds, and real estate.
- In their downtime, enjoy activities such as skiing, yoga, hiking, and tennis.

## 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.



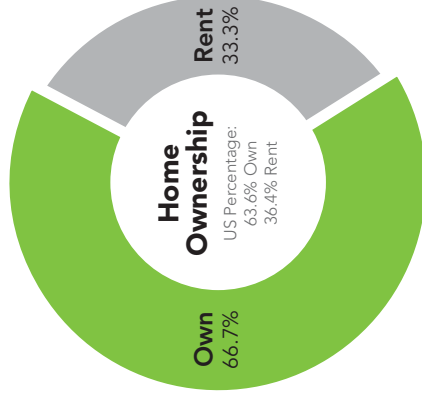
### Typical Housing:

Single Family

### Median Value:

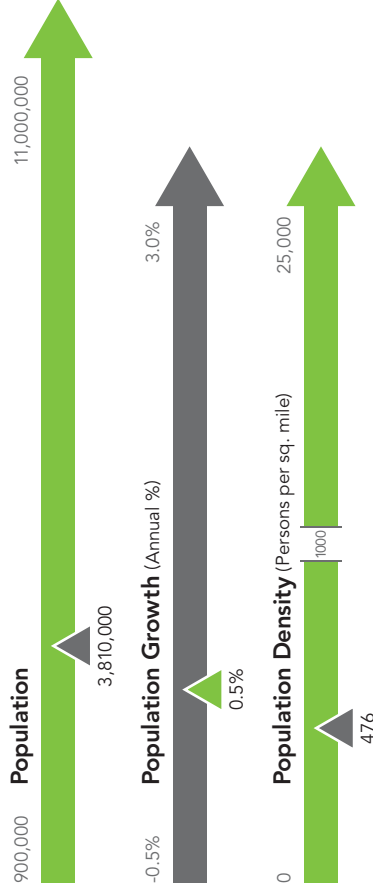
\$465,000

US Median: \$177,000



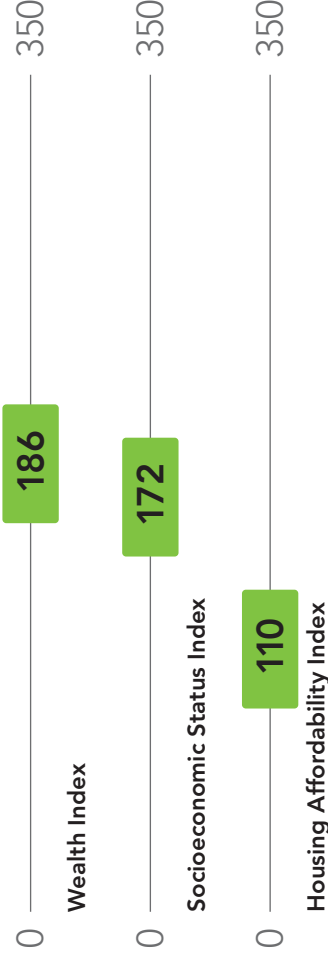
## POPULATION CHARACTERISTICS

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

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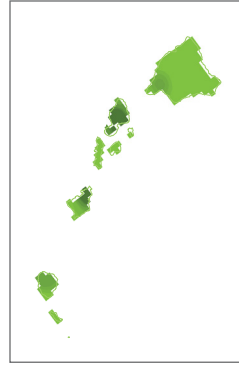
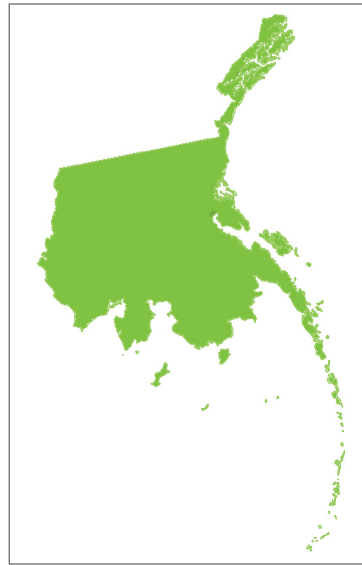
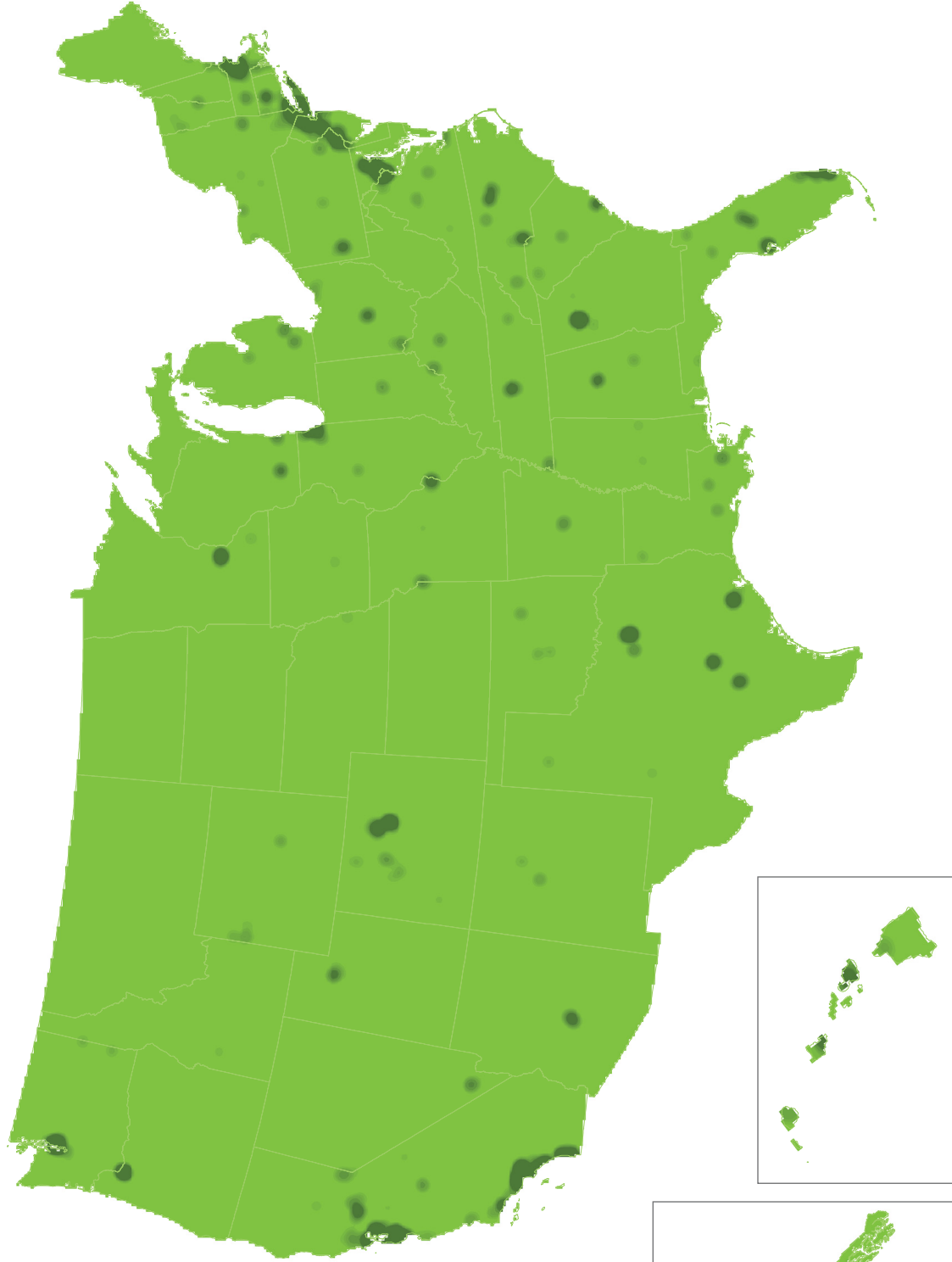
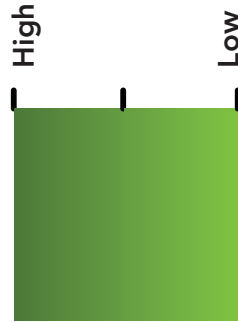


# LifeMode Group: Upscale Avenues Urban Chic



## SEGMENT DENSITY

This map illustrates the density and distribution of the *Urban Chic* Tapestry Segment by households.



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LifeMode Group: Senior Styles

# Golden Years

Households: 1,597,000

Average Household Size: 2.05

Median Age: 51.0

Median Household Income: \$61,000

9B



## WHO ARE WE?

Independent, active seniors nearing the end of their careers or already in retirement best describes Golden Years residents. This market is primarily singles living alone or empty nesters. Those still active in the labor force are employed in professional occupations; however, these consumers are actively pursuing a variety of leisure interests—travel, sports, dining out, museums, and concerts. They are involved, focused on physical fitness, and enjoying their lives. This market is smaller, but growing, and financially secure.

## OUR NEIGHBORHOOD

- This older market has a median age of 51 years and a disproportionate share (nearly 30%) of residents aged 65 years or older.
- Single-person households (over 40%) and married-couple families with no children (one-third) dominate these neighborhoods; average household size is low at 2.05 (Index 79).
- Most of the housing was built after 1970; approximately 43% of householders live in single-family homes and 42% in multiunit dwellings.
- These neighborhoods are found in large metropolitan areas, outside central cities, scattered across the US.

## SOCIOECONOMIC TRAITS

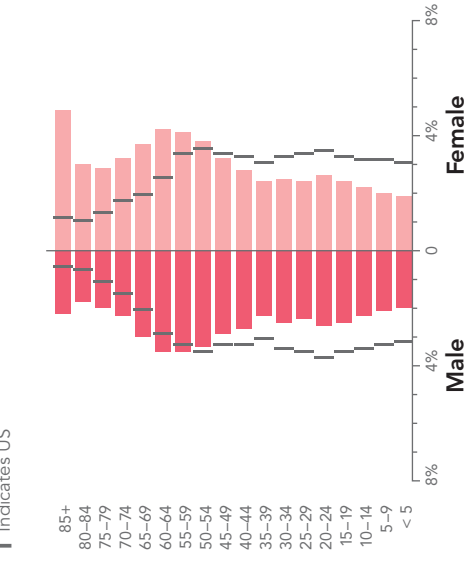
- Golden Years residents are well educated—20% have graduate or professional degrees, 26% have bachelor's degrees, and 26% have some college credits.
- Unemployment is low at 7% (Index 76), but so is labor force participation at 55% (Index 88), due to residents reaching retirement.
- Median household income is higher in this market, more than \$61,000. Although wages still provide income to 2 out of 3 households, earned income is available from investments (Index 172), Social Security benefits (Index 153), and retirement income (Index 149).
- These consumers are well connected: Internet access is used for everything from shopping or paying bills to monitoring investments and entertainment.
- They are generous supporters of the arts and charitable organizations.
- They keep their landlines and view cell phones more as a convenience.

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



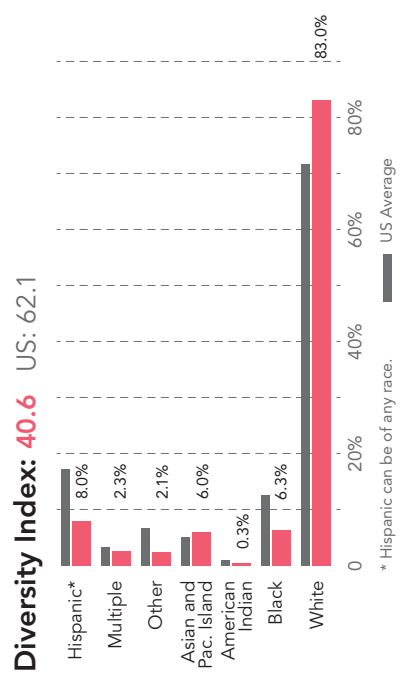
### AGE BY SEX (Esri data)

**Median Age: 51.0** US: 37.6  
I Indicates US



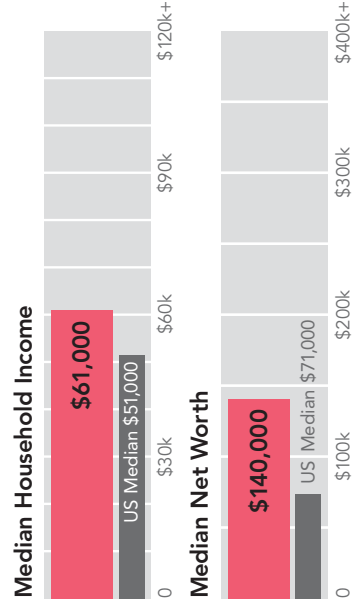
### RACE AND ETHNICITY (Esri data)

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).



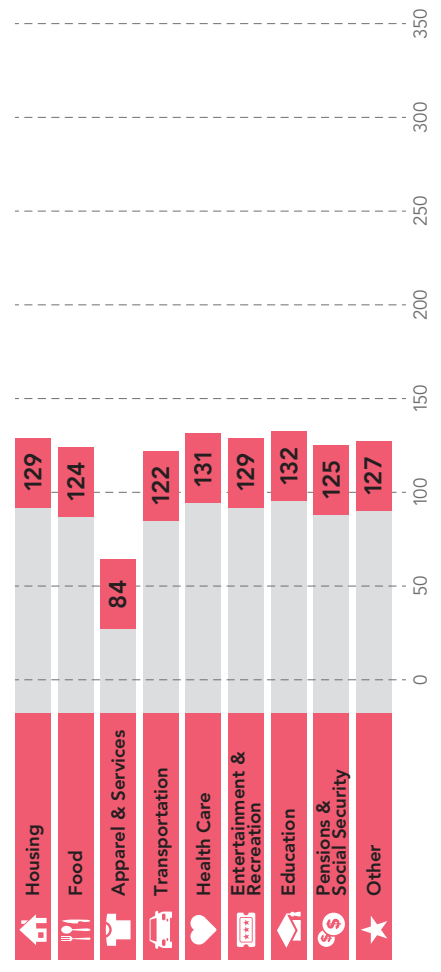
### INCOME AND NET WORTH

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.



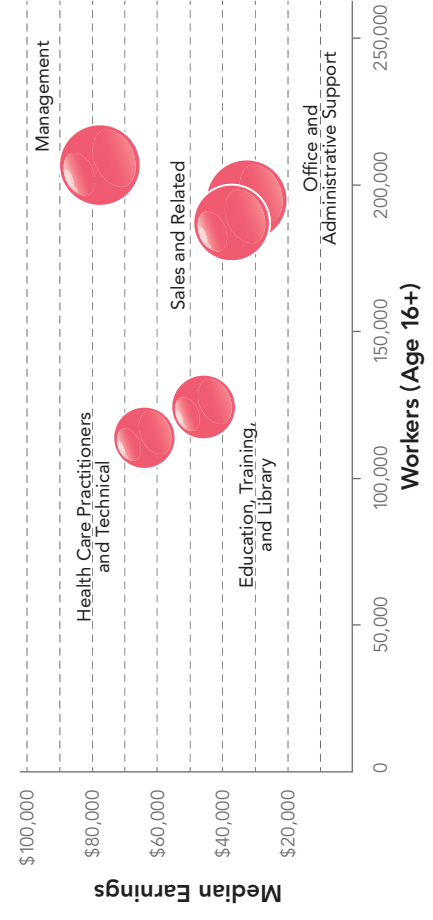
### AVERAGE HOUSEHOLD BUDGET INDEX

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.





## MARKET PROFILE

(Consumer preferences are estimated from data by GfK MRI)

- Avid readers, they regularly read daily newspapers, particularly the Sunday edition.
- They subscribe to cable TV; news and sports programs are popular as well as on-demand movies.
- They use professional services to maintain their homes inside and out and minimize their chores.
- Leisure time is spent on sports (tennis, golf, boating, and fishing) or simple exercise like walking.
- Good health is a priority; they believe in healthy eating, coupled with vitamins and dietary supplements.
- Active social lives include travel, especially abroad, plus going to concerts and museums.
- Residents maintain actively managed financial portfolios that include a range of instruments such as common stock and certificates of deposit (more than six months).

## 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.



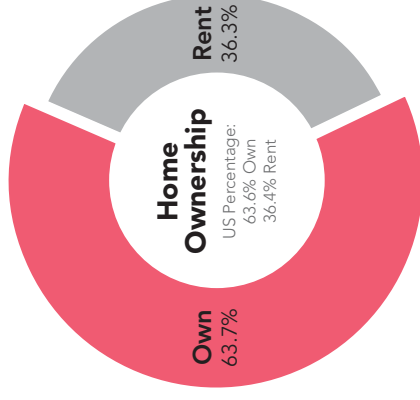
### Typical Housing:

Single Family;  
Multiunits

### Median Value:

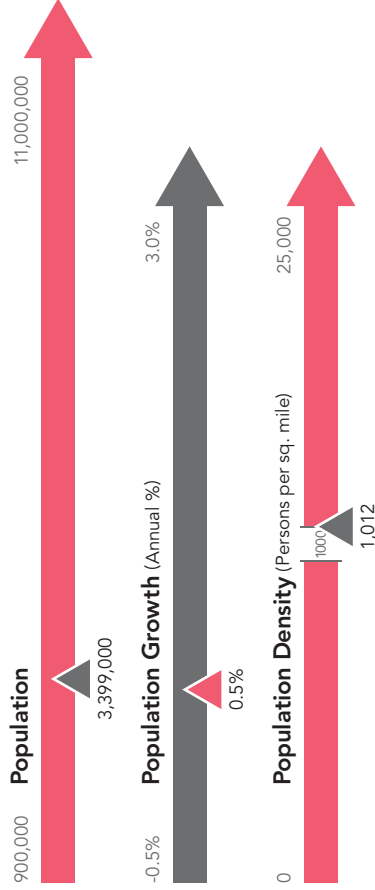
\$283,000

US Median: \$177,000



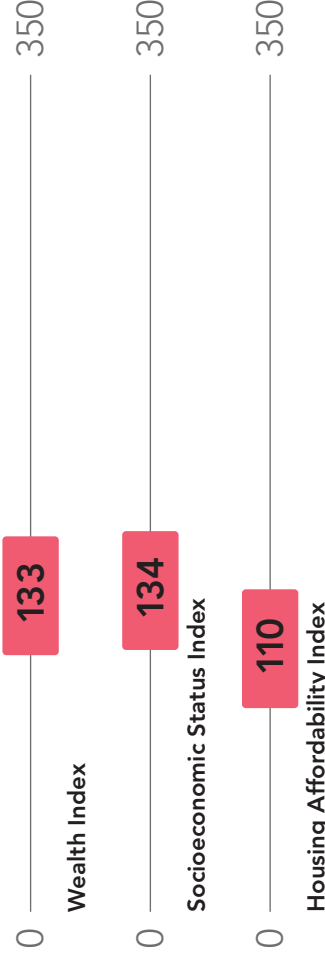
## POPULATION CHARACTERISTICS

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.



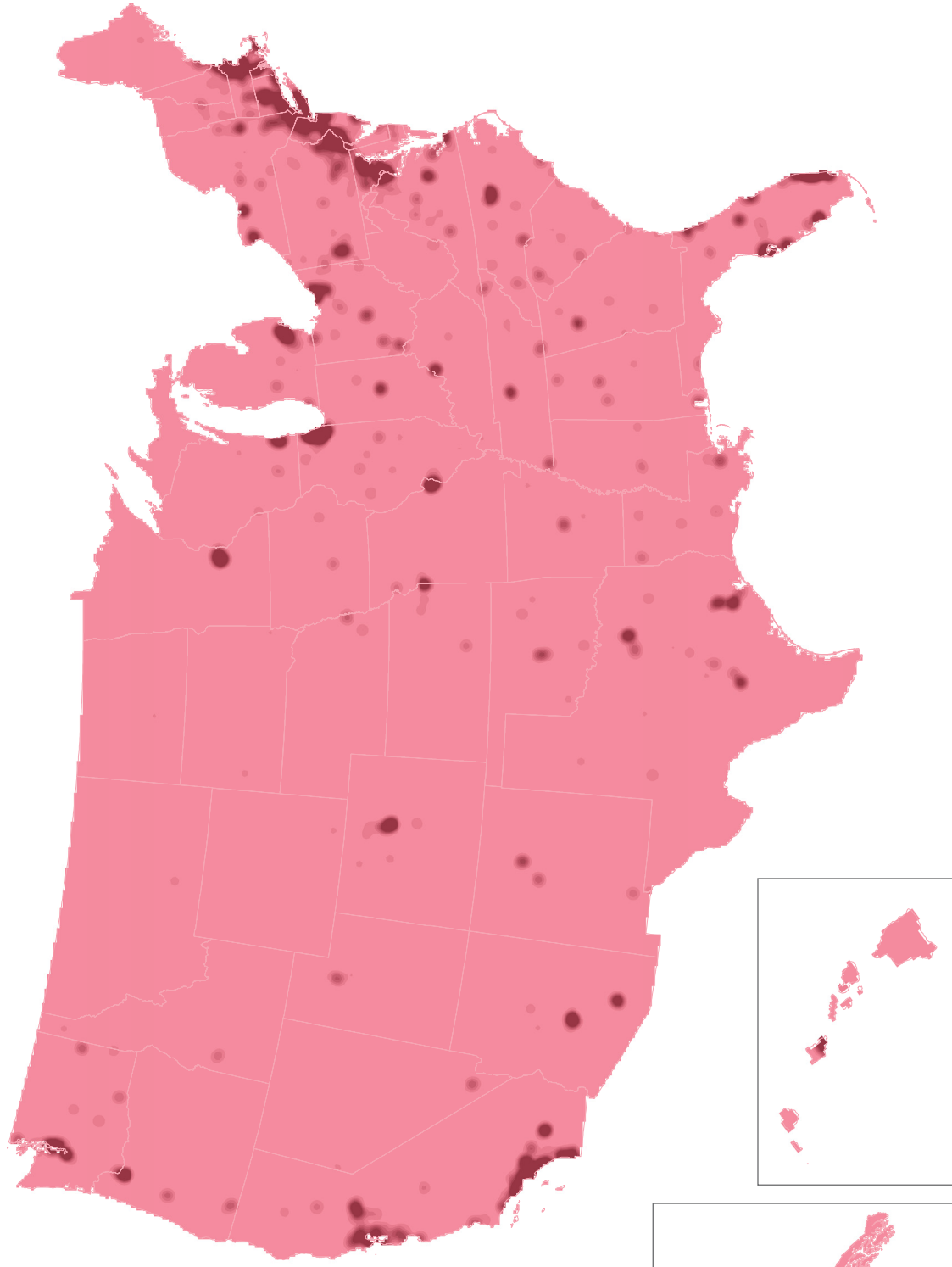
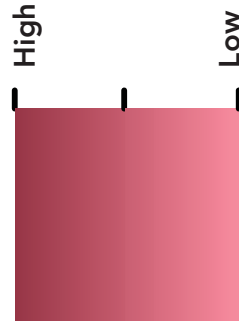
## ESRI INDEXES

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



### SEGMENT DENSITY

This map illustrates the density and distribution of the Golden Years Tapestry Segment by households.



# LifeMode Group: Affluent Estates Boomburbs

Households: 1,695,000

Average Household Size: 3.22

Median Age: 33.6

Median Household Income: \$105,000



## WHO ARE WE?

This is the new growth market, with a profile similar to the original: young professionals with families that have opted to trade up to the newest housing in the suburbs. The original Boomburbs neighborhoods began growing in the 1990s and continued through the peak of the housing boom. Most of those neighborhoods are fully developed now. This is an affluent market but with a higher proportion of mortgages. Rapid growth still distinguishes the Boomburbs neighborhoods, although the boom is more subdued now than it was 10 years ago. So is the housing market. Residents are well-educated professionals with a running start on prosperity.

## OUR NEIGHBORHOOD

- Growth markets are in the suburban periphery of large metropolitan areas.
- Young families are married with children (Index 221); average household size is 3.22.
- Home ownership is 84% (Index 133), with the highest rate of mortgages, 78% (Index 173).
- Primarily single-family homes, in new neighborhoods, 72% built since 2000 (Index 521).
- Median home value is \$293,000 (Index 165).
- Lower housing vacancy rate at 5.3%.
- The cost of affordable new housing comes at the expense of one of the longest commutes to work, over 30 minutes average, including a disproportionate number (34.5%) commuting across county lines (Index 146).

## SOCIOECONOMIC TRAITS

- Well educated young professionals, 52% are college graduates (Index 185).
- Unemployment is low at 5.2% (Index 60); high labor force participation at 72% (Index 115); most households have more than two workers (Index 123).
- Longer commute times from the suburban growth corridors (Index 121) have created more home workers (Index 154).
- They are well connected: own the latest devices and understand how to use them efficiently; biggest complaints—too many devices and too many intrusions on personal time.
- Financial planning is well under way for these professionals.



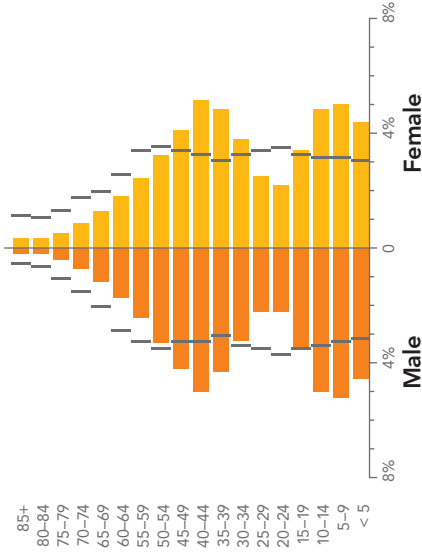
Note: The Index represents the ratio of the segment rate to the US rate multiplied by 100. Consumer preferences are estimated from data by GfK MRI.



## AGE BY SEX (Esri data)

**Median Age: 33.6** US: 37.6

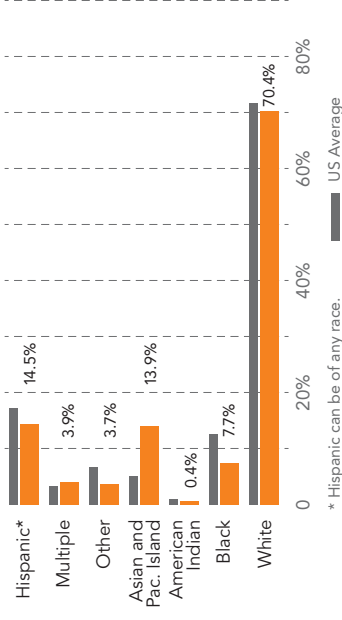
I Indicates US



## RACE AND ETHNICITY (Esri data)

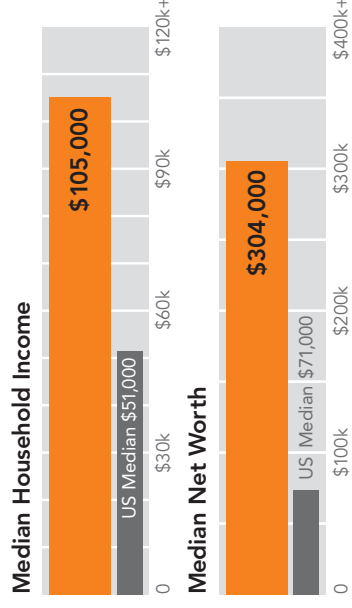
The Diversity Index summarizes racial and ethnic diversity. The index shows the likelihood that two persons, chosen at random from the same area, belong to different race or ethnic groups. The index ranges from 0 (no diversity) to 100 (complete diversity).

**Diversity Index: 60.9** US: 62.1



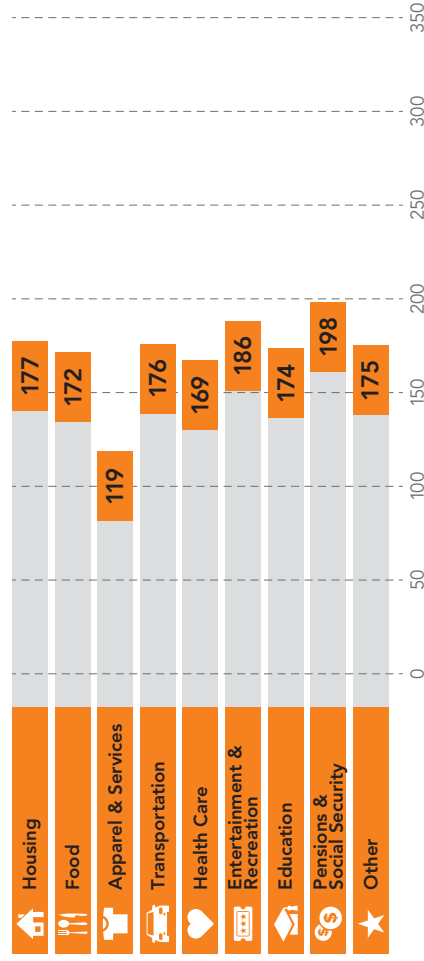
## INCOME AND NET WORTH

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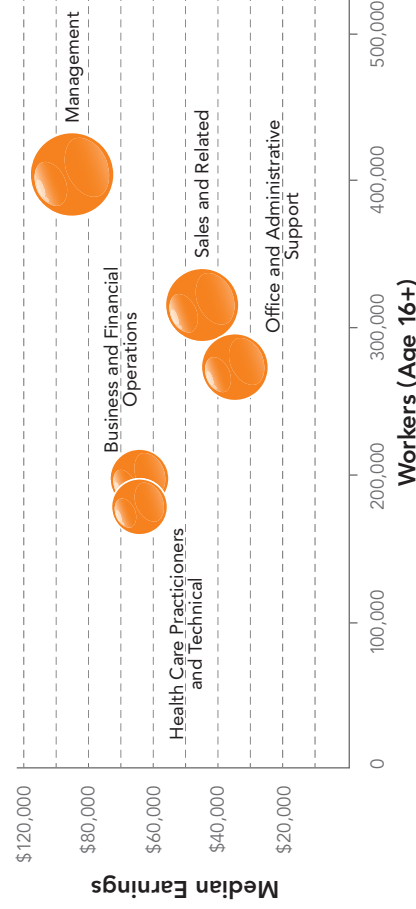
## AVERAGE HOUSEHOLD BUDGET INDEX

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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.



## MARKET PROFILE

(Consumer preferences are estimated from data by GfK MRI)

- Boomburbs residents prefer late model imports, primarily SUVs, and also luxury cars and minivans.
- This is one of the top markets for the latest in technology, from smartphones to tablets to Internet connectable televisions.
- Style matters in the Boomburbs, from personal appearance to their homes. These consumers are still furnishing their new homes and already remodeling.
- They like to garden but more often contract for home services.
- Physical fitness is a priority, including club memberships and home equipment.
- Leisure includes a range of activities from sports (hiking, bicycling, swimming, golf) to visits to theme parks or water parks.
- Residents are generous supporters of charitable organizations.

## 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.



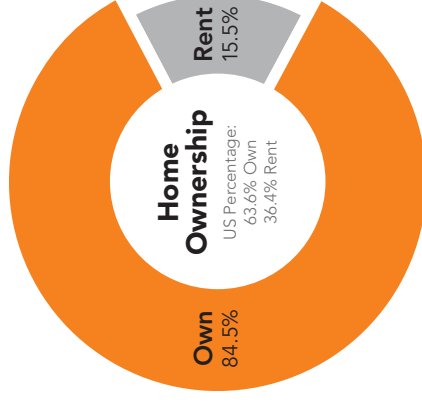
### Typical Housing:

Single Family

### Median Value:

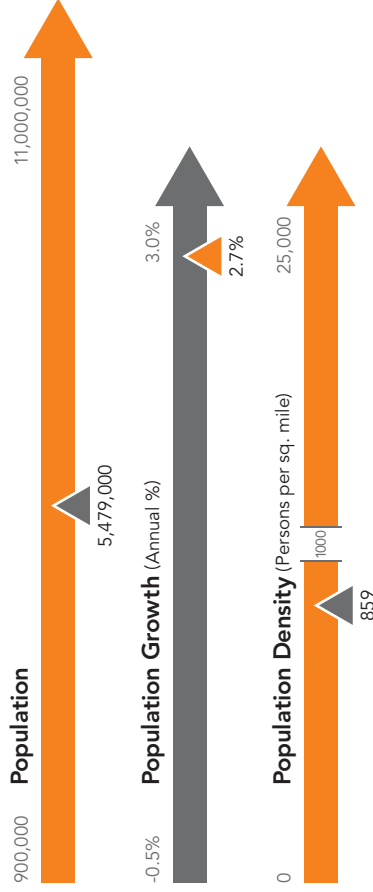
\$293,000

US Median: \$177,000



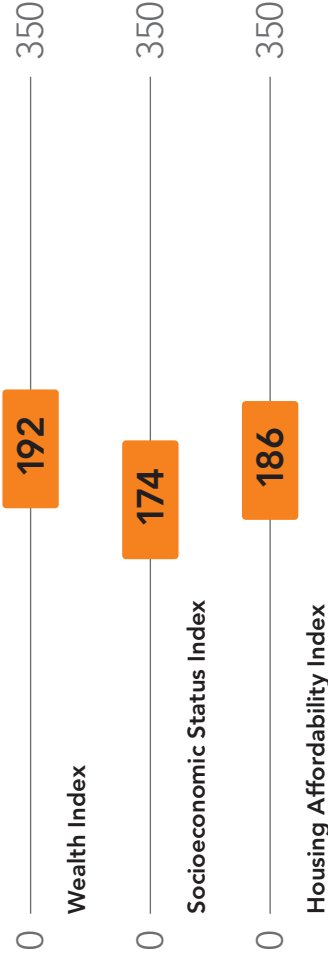
## POPULATION CHARACTERISTICS

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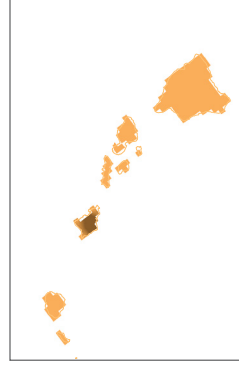
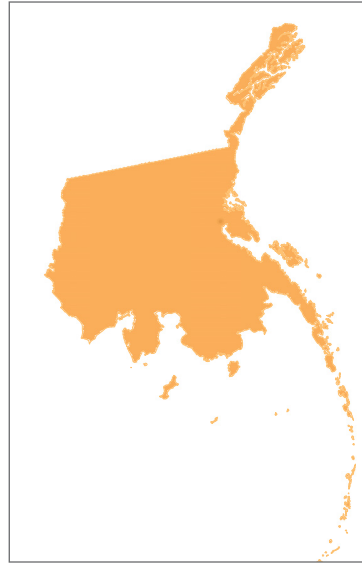
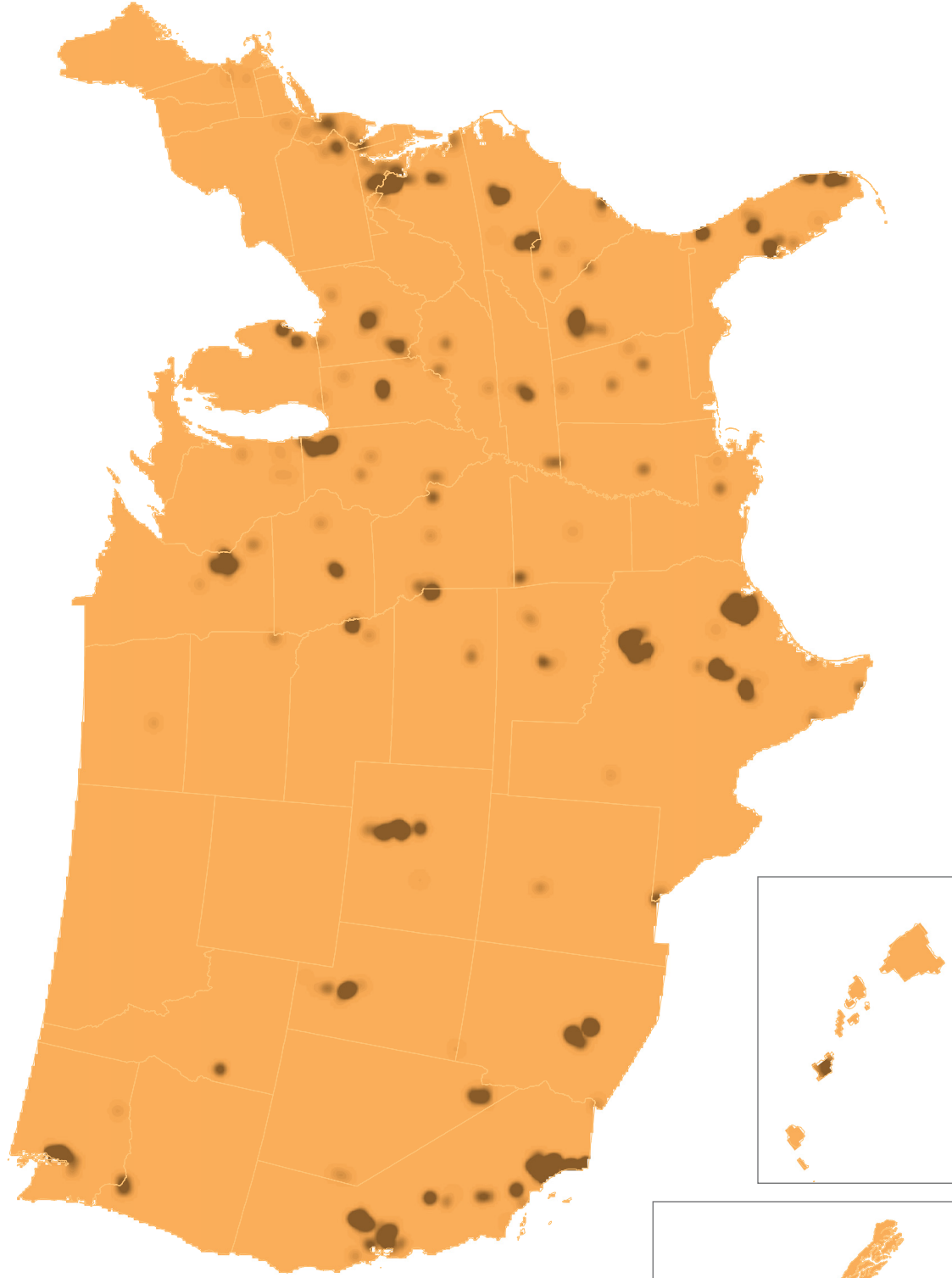
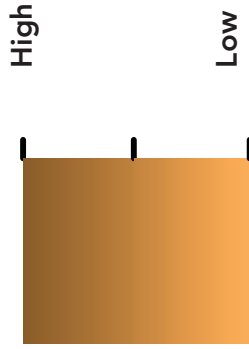


# LifeMode Group: Affluent Estates Boomburbs



## SEGMENT DENSITY

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



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1-800-447-9778  
info@esri.com  
esri.com



LifeMode Group: Upscale Avenues

# Enterprising Professionals

2D

Households: 1,627,000

Average Household Size: 2.46

Median Age: 34.8

Median Household Income: \$77,000



## WHO ARE WE?

*Enterprising Professionals* residents are well educated and climbing the ladder in STEM (science, technology, engineering, and mathematics) occupations. They change jobs often and therefore choose to live in condos, town homes, or apartments; many still rent their homes. The market is fast-growing, located in lower density neighborhoods of large metro areas. *Enterprising Professionals* residents are diverse, with Asians making up over one-fifth of the population. This young market makes over one and a half times more income than the US median, supplementing their income with high-risk investments. At home, they enjoy the Internet and TV on high-speed connections with premier channels and services.

## OUR NEIGHBORHOOD

- Almost half of households are married couples, and 30% are single person households.
- Housing is a mixture of suburban single-family homes, row homes, and larger multiunit structures.
- Close to three quarters of the homes were built after 1980; 22% are newer, built after 2000.
- Renters make up nearly half of all households.

## SOCIOECONOMIC TRAITS

- Median household income one and a half times that of the US.
- Over half hold a bachelor's degree or higher.
- Early adopters of new technology in hopes of impressing peers with new gadgets.
- Enjoy talking about and giving advice on technology.
- Half have smartphones and use them for news, accessing search engines, and maps.
- Work long hours in front of a computer.
- Strive to stay youthful and healthy, eat organic and natural foods, run and do yoga.
- Buy name brands and trendy clothes online.



Note: The Index represents the ratio of the segment rate to the US rate multiplied by 100. Consumer preferences are estimated from data by GfK MRI.



LifeMode Group: Upscale Avenues

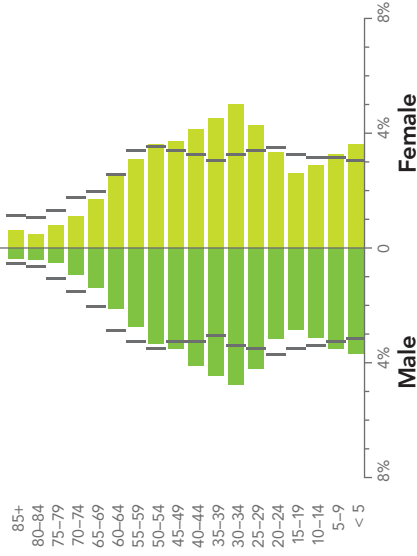
# Enterprising Professionals



## AGE BY SEX (Esri data)

**Median Age: 34.8** US: 37.6

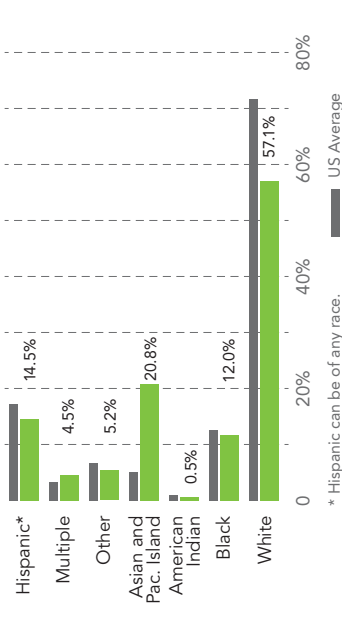
Indicates US



## RACE AND ETHNICITY (Esri data)

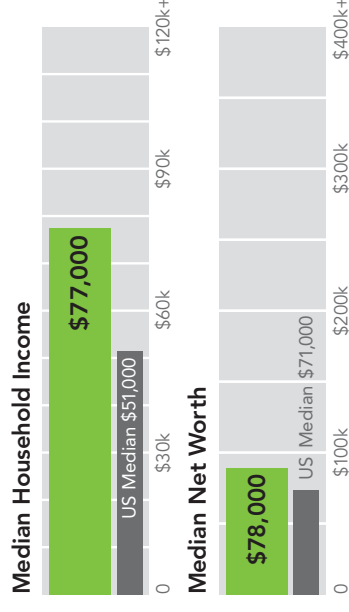
The Diversity Index summarizes racial and ethnic diversity. The index shows the likelihood that two persons, chosen at random from the same area, belong to different race or ethnic groups. The index ranges from 0 (no diversity) to 100 (complete diversity).

**Diversity Index: 71.2** US: 62.1



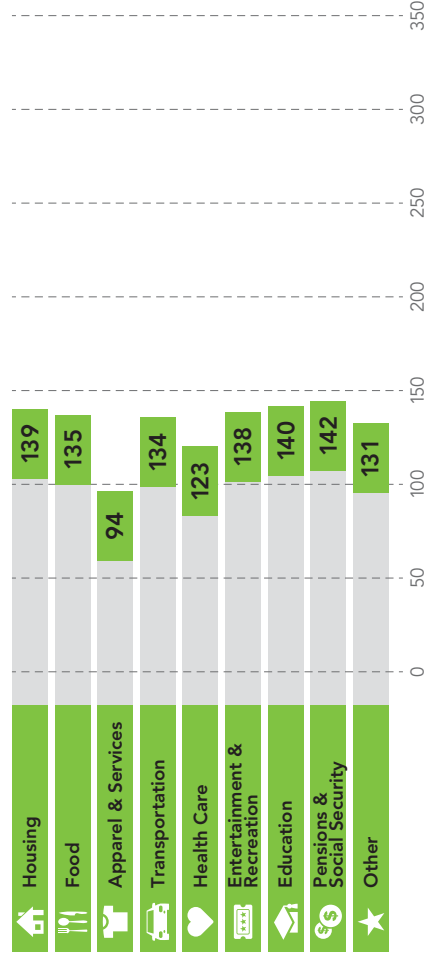
## INCOME AND NET WORTH

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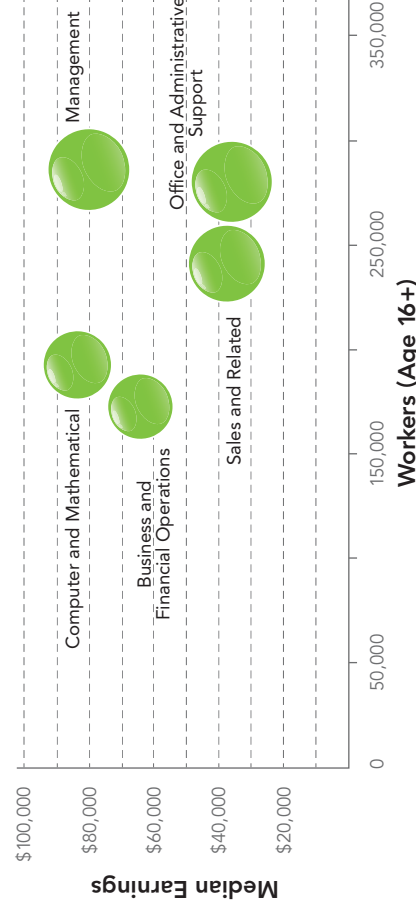
## AVERAGE HOUSEHOLD BUDGET INDEX

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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.



Workers (Age 16+)





LifeMode Group: Upscale Avenues

# Enterprising Professionals



TAPESTRY  
SEGMENTATION  
esri.com/tapestry

## MARKET PROFILE

(Consumer preferences are estimated from data by GfK MRI)

- Buy digital books for tablet reading, along with magazines and newspapers.
- Frequent the dry cleaner.
- Go on business trips, a major part of work.
- Watch movies and TV with video-on-demand and HDTV over a high-speed connection.
- Convenience is key—shop at Amazon.com and pick up drugs at the Target pharmacy.
- Eat out at The Cheesecake Factory and Chick-fil-A; drop by Starbucks for coffee.
- Leisure activities include gambling, trips to museums and the beach.
- Have health insurance and a 401(k) through work.

## 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:

Multifunits;  
Single Family

### Median Value:

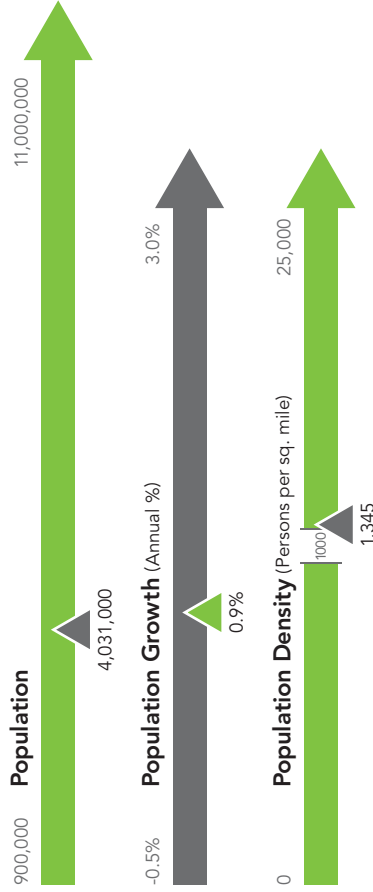
\$295,000

US Median: \$177,000



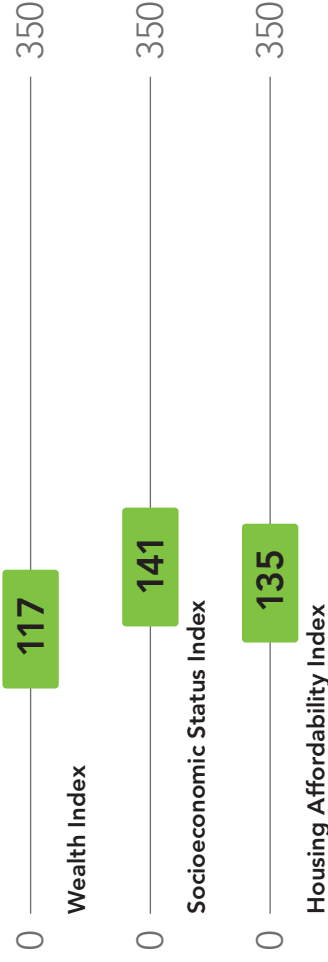
## POPULATION CHARACTERISTICS

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LifeMode Group: Upscale Avenues

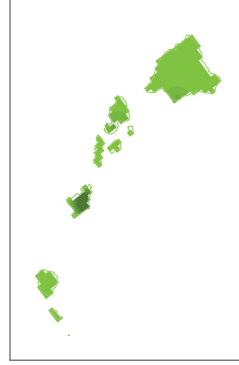
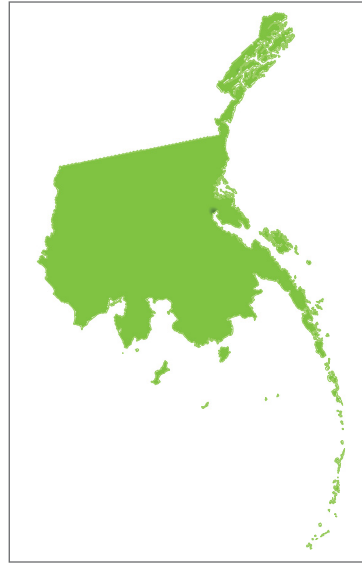
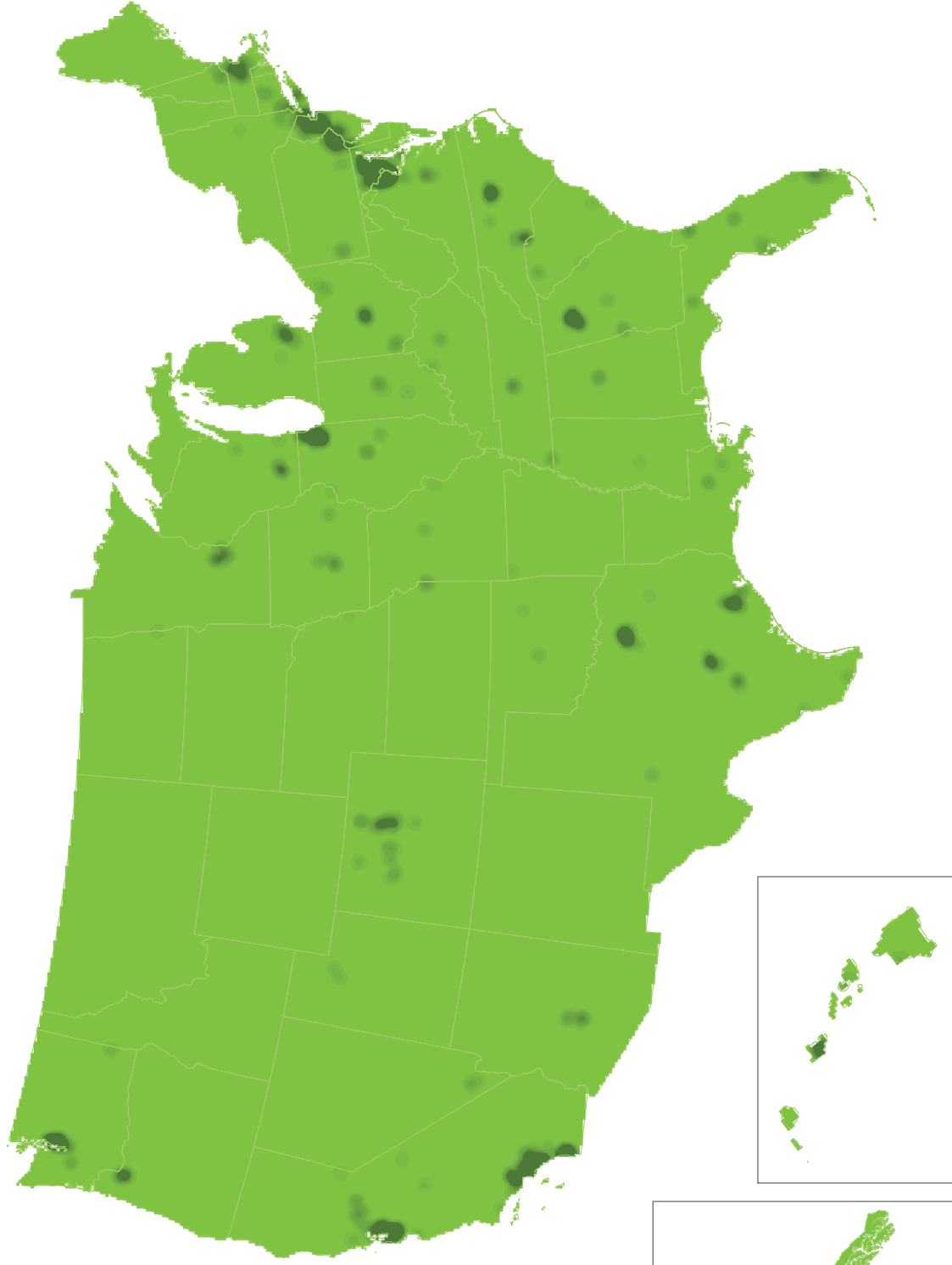
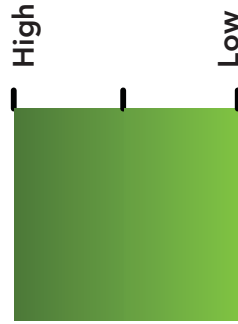
# Enterprising Professionals



**TAPESTRY  
SEGMENTATION**  
esri.com/tapestry

## SEGMENT DENSITY

This map illustrates the density and distribution of the *Enterprising Professionals* Tapestry Segment by households.



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For more information  
1-800-447-9778  
info@esri.com  
esri.com







LifeMode Group: Cozy Country Living  
**Green Acres**

6A

**Households:** 3,794,000

**Average Household Size:** 2.69

**Median Age:** 43.0

**Median Household Income:** \$72,000

## WHO ARE WE?

The Green Acres lifestyle features country living and self-reliance. They are avid do-it-yourselfers, maintaining and remodeling their homes, with all the necessary power tools to accomplish the jobs. Gardening, especially growing vegetables, is also a priority, again with the right tools, tillers, tractors, and riding mowers. Outdoor living also features a variety of sports: hunting and fishing, motorcycling, hiking and camping, and even golf. Self-described conservatives, residents of Green Acres remain pessimistic about the near future yet are heavily invested in it.

## OUR NEIGHBORHOOD

- Rural enclaves in metropolitan areas, primarily (not exclusively) older homes with acreage; new housing growth in the past 10 years.
- Single-family, owner-occupied housing, with a median value of \$197,000.
- An older market, primarily married couples, most with no children.

## SOCIOECONOMIC TRAITS

- Education: 60% are college educated.
- Unemployment is low at 6% (Index 70); labor force participation rate is high at 67.4% (Index 108).
- Income is derived not only from wages and salaries but also from self-employment (more than 15% of households), investments (30% of households), and increasingly, from retirement.
- They are cautious consumers with a focus on quality and durability.
- Comfortable with technology, more as a tool than a trend: banking or paying bills online is convenient; but the Internet is not viewed as entertainment.
- Economic outlook is professed as pessimistic, but consumers are comfortable with debt, primarily as home and auto loans, and investments.

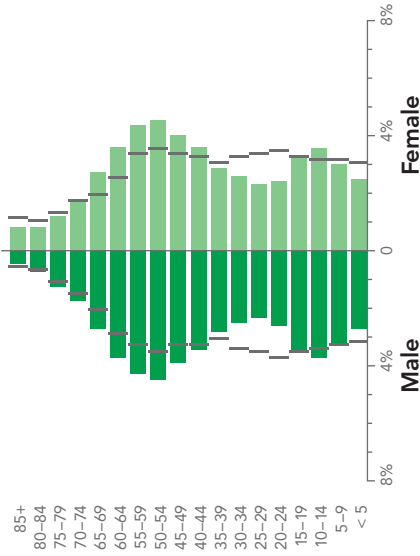


Note: The index represents the ratio of the segment rate to the US rate multiplied by 100. Consumer preferences are estimated from data by GfK MRI.

### AGE BY SEX (Esri data)

**Median Age: 43.0** US: 37.6

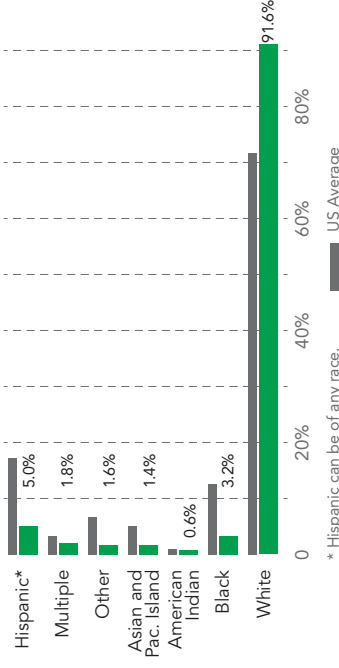
I Indicates US



### RACE AND ETHNICITY (Esri data)

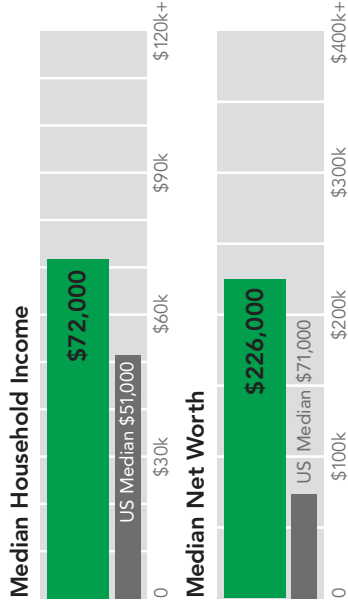
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**Diversity Index: 24.0** US: 62.1



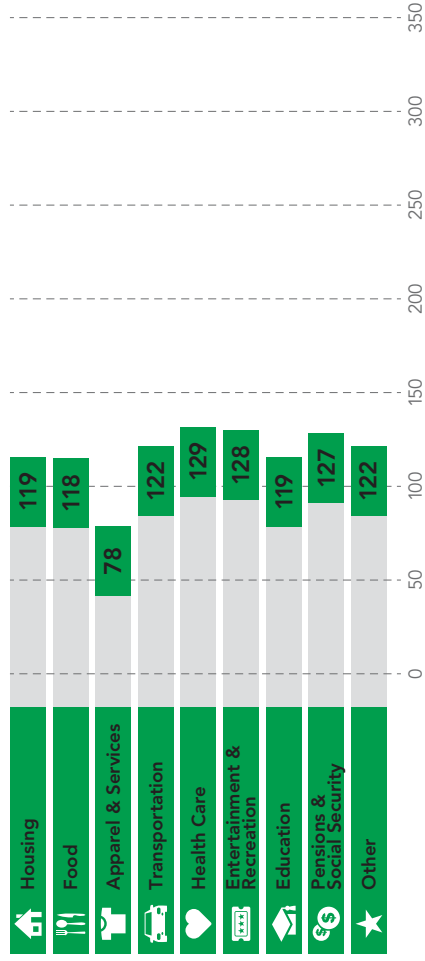
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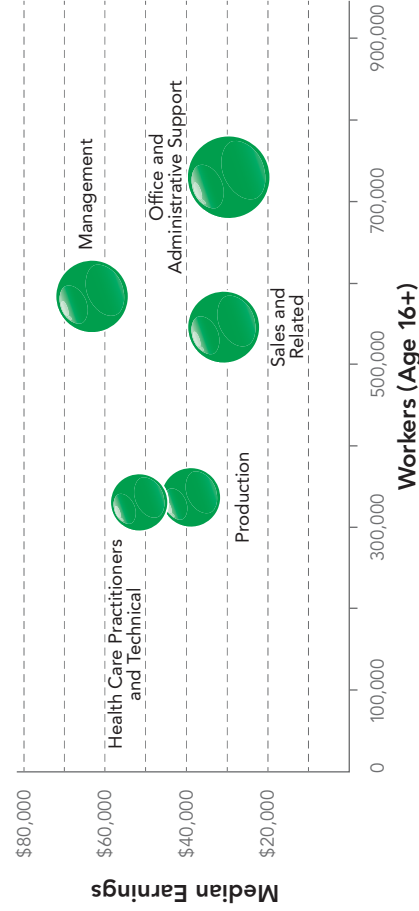
### AVERAGE HOUSEHOLD BUDGET INDEX

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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.



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

- Purchasing choices reflect Green Acres' residents country life, including a variety of vehicles from trucks and SUVs to ATVs and motorcycles, preferably late model.
- Homeowners favor DIY home improvement projects and gardening.
- Media of choice are provided by satellite service, radio, and television, also with an emphasis on country and home and garden.
- Green Acres residents pursue physical fitness vigorously, from working out on home exercise equipment to playing a variety of sports.
- Residents are active in their communities and a variety of social organizations, from fraternal orders to veterans' clubs.

## 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.



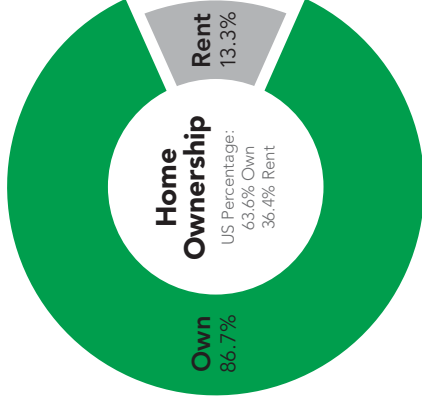
### Typical Housing:

Single Family

### Median Value:

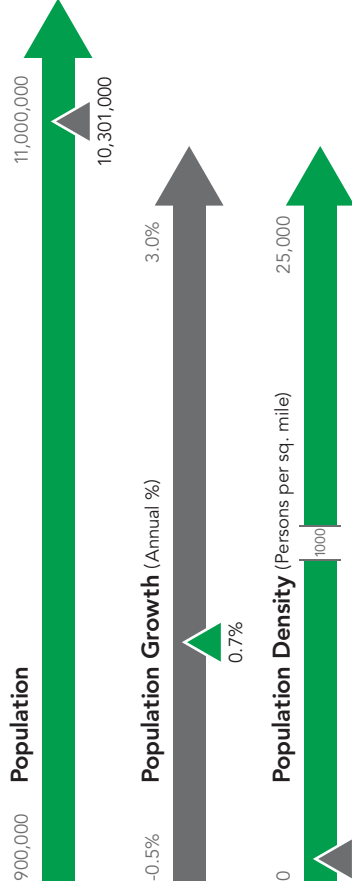
\$197,000

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.



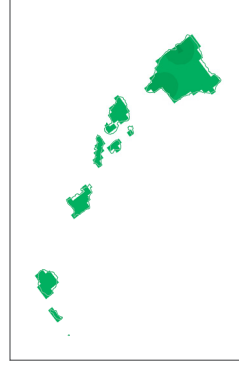
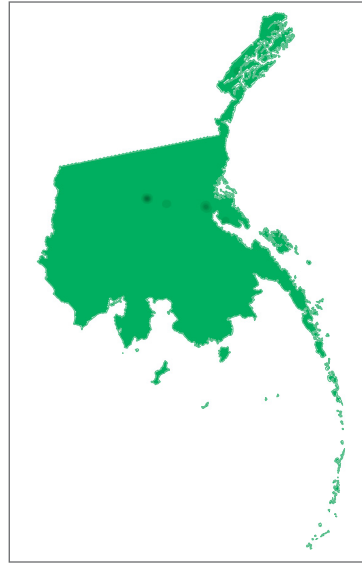
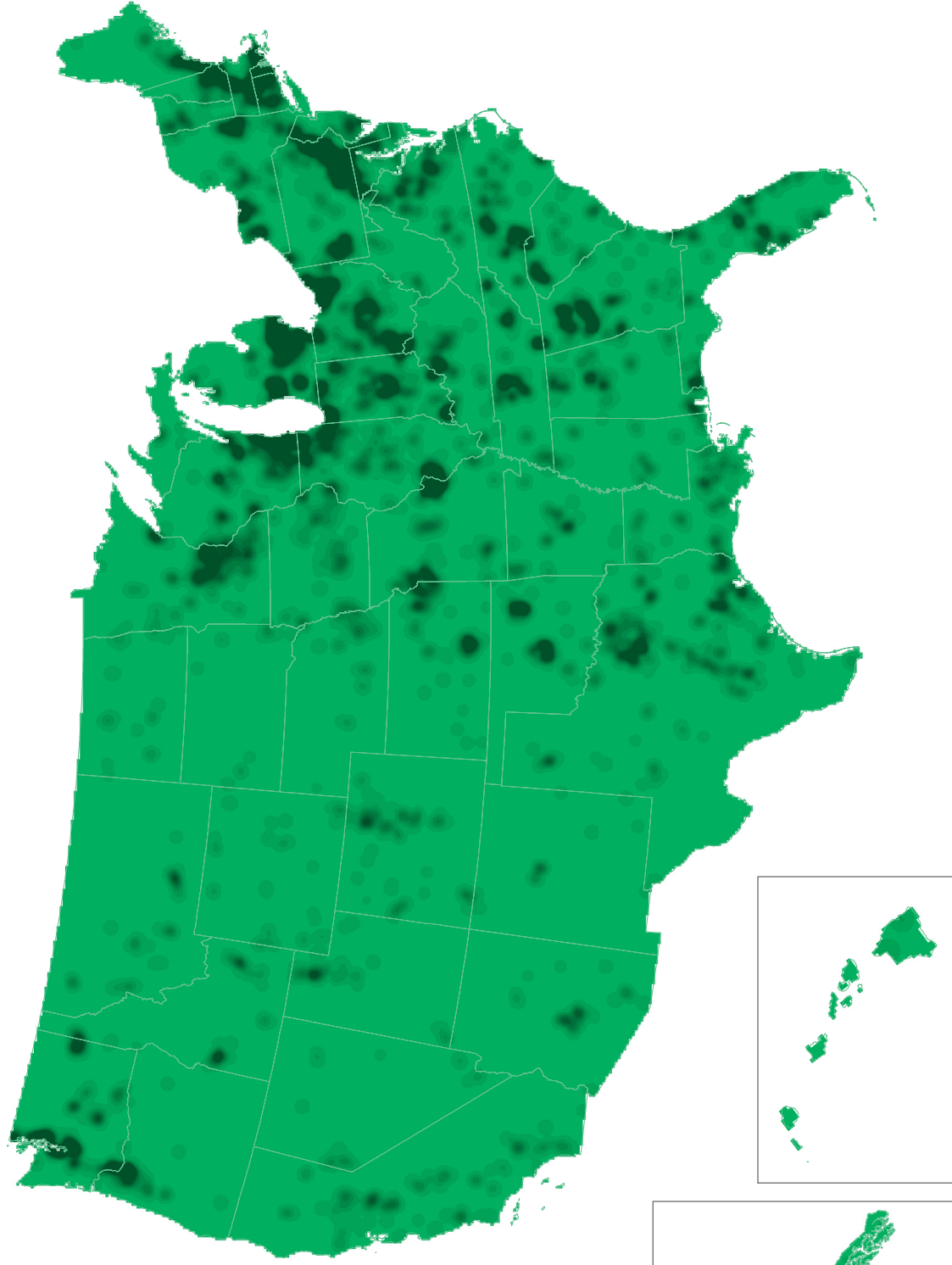
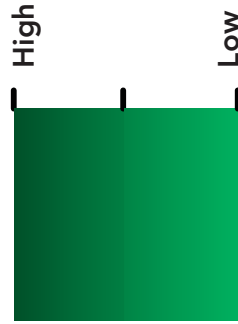


# LifeMode Group: Cozy Country Living Green Acres



## SEGMENT DENSITY

This map illustrates the density and distribution of the Green Acres Tapestry Segment by households.



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# APPENDIX B – CAREFREE CONSUMER SURVEY TABLES



Carefree Village Center Master Plan  
 Consumer Survey Response  
 Carefree Resident

Q1. How often do you eat out?		
Answer Options	Response Percent	Response Count
5 or more times a week	7.3%	20
2-4 times a week	42.9%	118
Once a week	38.2%	105
Once a month	9.1%	25
Once every few months	2.2%	6
Never	0.4%	1
<i>answered question</i>		<b>275</b>
<i>skipped question</i>		<b>5</b>

Q2. How often do you come to Carefree Town Center for the following?					
Answer Options	One or more times / Week	One to Two times / Month	Occasionally or Rarely	Never	Response Count
Non grocery retail shopping	52	65	104	49	270
Eating out	64	68	121	22	275
Personal care services (spa, salon, etc.)	20	55	77	119	271
Professional service (legal, accounting, etc.)	8	12	80	169	269
Work	30	3	8	223	264
<i>answered question</i>					<b>280</b>
<i>skipped question</i>					<b>0</b>

Q3. What are the two biggest reasons for you to stop downtown? For those living in Carefree, please identify reasons besides picking up your mail. (i.e. specific establishment, attraction or		
Answer Options	Response Percent	Response Count
Reason One	100.0%	262
Reason Two	90.1%	236
<i>answered question</i>		<b>262</b>
<i>skipped question</i>		<b>18</b>

Carefree Village Center Master Plan  
Consumer Survey Response  
Carefree Resident

Q4. How often do you shop at the following locations/stores?							
Answer Options	More than once a week	Once a week	Twice a month	Once a month	Once every few months	Never	Response Count
Carefree Bhashas Center	122	64	33	20	32	9	280
Scottsdale Summit (Safeway/Target)	72	85	59	33	22	9	280
Carefree Town Center	34	39	36	38	66	58	271
Cave Creek Town Center	16	27	37	43	76	73	272
Desert Ridge	5	21	55	43	105	42	271
Scottsdale Road and the 101	13	38	57	59	70	35	272
Kierland Commons	3	15	38	39	111	69	275
Terravita Marketplace	39	40	46	42	44	65	276
Costco (Cave Creek and 101)	10	34	52	56	40	83	275
Walmart Super Center (Cave Creek Road)	32	43	50	34	44	75	278
						<i>answered question</i>	<b>280</b>
						<i>skipped question</i>	<b>0</b>

Q5. Which of the following events did you attend in the last 12 months? (Check all that apply).		
Answer Options	Response Percent	Response Count
Thunderbird Fine Art and Wine Festival	75.2%	179
Christmas Festival/Electric Light Parade	51.3%	122
Cruise-in at Venues Café	16.8%	40
Sonoran Art Festival	51.7%	123
Indian Market and Cultural Festival	41.2%	98
Chocolate Festival	33.6%	80
Southwest Fine Art and Craft Festival	46.6%	111
Carefree Days	34.5%	82
Veteran's Day Tribute	18.5%	44
	<i>answered question</i>	<b>238</b>
	<i>skipped question</i>	<b>42</b>



Carefree Village Center Master Plan  
 Consumer Survey Response  
 Carefree Resident

Q6. What TWO TYPES of restaurants would you most like to see in the Carefree Town Center?		
Answer Options	Response Percent	Response Count
Asian	11.1%	31
Coffee Shop	12.5%	35
Italian	6.4%	18
Organic / Healthy	19.6%	55
Bakery	9.6%	27
Delicatessen	21.4%	60
Late Night Eat/Drink	4.3%	12
Seafood	18.2%	51
Banquet Room	0.0%	0
Family Restaurant	14.3%	40
Mexican	23.2%	65
Steakhouse	13.6%	38
Barbecue	6.1%	17
Fast Food	4.6%	13
Middle Eastern	2.5%	7
Vegetarian	3.9%	11
Brew Pub	17.1%	48
Greek	3.2%	9
Breakfast	8.2%	23
Other (please specify)		41
<b>answered question</b>		<b>280</b>
<b>skipped question</b>		<b>0</b>

Carefree Village Center Master Plan  
Consumer Survey Response  
Carefree Resident

**Q7. What of the following attracts you to a shopping/business area? Select ONE for EACH.**

Answer Options	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree	Response Count
A variety of products and services	122	103	42	6	5	278
Quality of products and services	163	95	16	1	3	278
The look and feel of a business area	107	99	54	7	7	274
Friendly customer service	163	98	11	1	2	275
Independent stores over chains	76	76	102	14	6	274
Shopping after 5 pm on weekdays	41	73	123	25	13	275
Shopping on weekends	73	102	84	12	4	275
Convenient parking	117	128	24	5	2	276
Price	83	106	74	5	4	272
Proximity to home or work	102	109	51	9	3	274
Safety (personal, pedestrian and transportation)	98	93	70	6	9	276
Other (please specify)						19
					<i>answered question</i>	<b>279</b>
					<i>skipped question</i>	<b>1</b>

**Q8. Considering the Carefree Town Center, check up to FIVE changes that are necessary for merchants to get even more of your business.**

Answer Options	Response Percent	Response Count
More variety of stores	76.3%	209
Better quality of merchandise	31.0%	85
Better atmosphere	15.7%	43
A greater feeling of safety	1.8%	5
Improved parking	12.0%	33
More places to eat	62.4%	171
More special events	17.2%	47
More competitive pricing	44.9%	123
Better selection of merchandise	62.0%	170
Better customer service	10.9%	30
Consistent store hours	24.5%	67
Evening store hours	18.2%	50
Less traffic congestion	4.7%	13
More advertising	8.8%	24
Other (please specify)		34
	<i>answered question</i>	<b>274</b>
	<i>skipped question</i>	<b>6</b>

Carefree Village Center Master Plan  
Consumer Survey Response  
Carefree Resident

Q9. Please review the choices listed below. What FIVE potential businesses would you most likely use if they were to open in the Carefree Town Center?		
Answer Options	Response Percent	Response Count
Antiques	9.6%	27
Art Galleries	7.5%	21
Arts/Crafts	9.3%	26
Auto parts	7.1%	20
Bakery	41.1%	115
Books, periodicals and music	22.9%	64
Butcher	23.6%	66
Clothing	22.5%	63
Drug store/sundries	18.6%	52
Electronics and small appliances	6.4%	18
Florist	6.4%	18
Furniture	2.5%	7
Garden Center	25.0%	70
Gifts/knickknacks	7.1%	20
Grocery	20.0%	56
Hardware	3.9%	11
Health club	13.9%	39
Home furnishings	7.1%	20
Jeweler	2.5%	7
Live theater	26.8%	75
Medical/dental services	3.2%	9
Movie theater	42.9%	120
Office supplies, stationary	12.5%	35
Pet supply and services	12.5%	35
Photographic equipment and supplies	3.2%	9
Professional services	8.2%	23
Recreational equipment and supplies	8.2%	23
Restaurants	64.6%	181
Shoes	8.9%	25
Specialty food store	49.3%	138
Video and audio equipment	2.5%	7
Other (please specify)		36
<b>answered question</b>		<b>280</b>
<b>skipped question</b>		<b>0</b>

Carefree Village Center Master Plan  
 Consumer Survey Response  
 Carefree Resident

Q10. Which community assets/activities would you most like to see come to the Carefree Town Center? (Check all that apply)			
Answer Options	Response Percent	Response Count	
Performing arts facility	40.6%	102	
Museum	26.3%	66	
Concerts and shows in the amphitheater	73.7%	185	
Culinary festivals	53.0%	133	
Art festivals	35.5%	89	
Public art	17.5%	44	
Expanded public parking	21.5%	54	
Other (please specify)		25	
<i>answered question</i>			<b>251</b>
<i>skipped question</i>			<b>29</b>

Q11. Have you ever lived downtown in any community?			
Answer Options	Response Percent	Response Count	
Yes	41.1%	115	
No	58.9%	165	
<i>answered question</i>			<b>280</b>
<i>skipped question</i>			<b>0</b>

Q12. What is your opinion about living in Carefree Town Center?			
Answer Options	Response Percent	Response Count	
I am not interested in living in the Town Center in Carefree.	61.8%	173	
I might consider living in the Town Center in Carefree given	32.1%	90	
I am interested in living in the Town Center in Carefree.	6.1%	17	
<i>answered question</i>			<b>280</b>
<i>skipped question</i>			<b>0</b>

Q13. If you moved to Carefree Town Center, what size housing unit would you require?			
Answer Options	Response Percent	Response Count	
Studio	0.9%	1	
1 bedroom	7.5%	8	
2 bedroom	63.2%	67	
3 bedroom	28.3%	30	
<i>answered question</i>			<b>106</b>
<i>skipped question</i>			<b>174</b>

Carefree Village Center Master Plan  
Consumer Survey Response  
Carefree Resident

Q14. What housing arrangement would you choose?			
Answer Options	Response Percent	Response Count	
Ownership	89.5%	94	
Rental	10.5%	11	
			<b>105</b>
<i>answered question</i>			<b>175</b>
<i>skipped question</i>			

Q15. What type of Carefree Town Center housing would you prefer? (Check all that apply)			
Answer Options	Response Percent	Response Count	
Townhouse	40.0%	42	
Condo	46.7%	49	
2-4 residential unit building	25.7%	27	
5+ unit residential building	7.6%	8	
Flat/Loft above commercial	39.0%	41	
			<b>105</b>
<i>answered question</i>			<b>175</b>
<i>skipped question</i>			

Q16. What price range would you consider?			
Answer Options	Response Percent	Response Count	
Less than \$500,000	54.7%	58	
\$500,000 - \$750,000	34.0%	36	
\$750,000 - \$1 million	8.5%	9	
Greater than \$1 million	2.8%	3	
			<b>106</b>
<i>answered question</i>			<b>174</b>
<i>skipped question</i>			

Q17. Imagine the Carefree Town Center in ten years. How appealing are these future scenarios?					
Answer Options	Very Appealing	Okay	Not Appealing	Don't Know	Response Count
The center of employment with the addition of new office	41	113	117	9	280
An attractive place to call home with new apartments, condos	80	83	109	8	280
An aesthetic blend of greenspace, natural elements,	142	106	24	8	280
A meeting place and the center of community activities with a	176	73	27	4	280
A niche place where thrift stores, used merchandise, and	40	63	166	11	280
A destination retail center attracting people from a distance	60	82	119	19	280
					<b>280</b>
<i>answered question</i>					<b>0</b>
<i>skipped question</i>					

**Carefree Village Center Master Plan  
Consumer Survey Response  
Carefree Resident**

**Q18. Please tell us about you.**  
 What is your home zip code  
 What is your work zip code (if retired enter 00000)  
 Number of people living in your household

Home City	Count	Percent	Work City	Count	Percent	
Carefree	283	63.0%	Carefree	138	46.3%	
Cave Creek	76	16.9%	Cave Creek	60	20.1%	
Phoenix	25	5.6%	Scottsdale	54	18.1%	
Scottsdale	48	10.7%	Phoenix	23	7.7%	
Mesa	2	0.4%	Mesa	1	0.3%	
Glendale	1	0.2%	Glendale	2	0.7%	
Peoria	1	0.2%	Gila Bend	1	0.3%	
Gila Bend	1	0.2%	Palo Verde	1	0.3%	
Sammamish, WA	1	0.2%	Sun City West	1	0.3%	
Seattle, WA	1	0.2%	Casa Grande	1	0.3%	
Gambrills, MD	1	0.2%	New River	1	0.3%	
Apopka, FL	1	0.2%	Salt Lake City	1	0.3%	
Melber, KY	2	0.4%	Dillon, CO	1	0.3%	
Iowa City IA	1	0.2%	Boulder, CO	1	0.3%	
Bismark, ND	1	0.2%	Chicago, IL	3	1.0%	
Chicago, IL	1	0.2%	Northbrook, IL	1	0.3%	
Oklahoma City, OK	1	0.2%	Island Lake, IL	1	0.3%	
Boulder, CO	1	0.2%	Bismarck, ND	1	0.3%	
Ft. Collins, CO	1	0.2%	Iowa City, IA	1	0.3%	
	Total	449	100.0%	Northville, MI	1	0.3%
			Melber, KY	1	0.3%	
			Schenectady, NY	1	0.3%	
			Purchase, NY	1	0.3%	
			Chappaqua, NY	1	0.3%	
			Total	298	100.0%	

Carefree Village Center Master Plan  
Consumer Survey Response  
Carefree Resident

Q19. What is your gender?			
Answer Options	Response Percent	Response Count	
Male	46.8%	130	
Female	53.2%	148	
<i>answered question</i>			<b>278</b>
<i>skipped question</i>			<b>2</b>

Q20. Do you reside FULL TIME in Carefree or other Arizona City?			
Answer Options	Response Percent	Response Count	
Yes	85.0%	238	
No	15.0%	42	
<i>answered question</i>			<b>280</b>
<i>skipped question</i>			<b>0</b>

Q21. What is the zip code of your seasonal/other residence?			
Answer Options	Response Average	Response Total	Response Count
Zip Code			45
<i>answered question</i>			<b>45</b>
<i>skipped question</i>			<b>238</b>

Seasonal Residence	Count	Percent
Alaska	1	2.2%
California	3	6.7%
Colorado	3	6.7%
France	1	2.2%
Illinois	9	20.0%
Kansas	1	2.2%
Michigan	4	8.9%
Minnesota	2	4.4%
Montana	2	4.4%
New York	1	2.2%
North Dakota	1	2.2%
Ohio	3	6.7%
Oklahoma	1	2.2%
Utah	1	2.2%
Washington	10	22.2%
Wisconsin	2	4.4%
Total	45	100.0%



Carefree Village Center Master Plan  
Consumer Survey Response  
Carefree Resident

<p><b>Q22. Please share any other thoughts, comments ideas or suggestions that you have regarding the Carefree Town Center.</b></p>
<p><b>Answered Question: 182</b></p>
<p><b>Skipped Qs: 98</b></p>
<p>Lovely little city that seriously needs some attention. When passing through, it looks deserted. Main crossroads need to be fixed up and make a statement about this small town and its relaxed sophistication. It needs help to show we care.</p>
<p>We miss Carefree Station restaurant. Would love another restaurant to fill that space.</p>
<p>Help businesses and avoid constructing unneeded municipal buildings</p>
<p>A beautiful place to visit.</p>
<p>The idea I've heard of making Carefree Town Center into something like Kierland shopping center is appalling, with condos above retail shops. It does NOT belong in Carefree. We need businesses to fill in all of the empty buildings we already have. The place looks mostly like a ghost town. Most of the current retail property owners in CTC do not seem interested in having a lively, lovely town center. Why anyone other than Carefree residents would want to come here to shop is beyond me. There is barely anything there now. Adding new retail buildings will do nothing if the rest of the CTC is void of businesses. Thank goodness for the various art fairs. At least the Not appealing to visit since there are so many empty stores. Unless going to a specific place not worth the trip to browse.</p>
<p>An addition of a Native American museum, a few upscale casual shoe and clothing stores, but a strong emphasis on the natural beauty of the Sonoran. Less is more when incorporated into the unique landscape with the natural flora &amp; fauna. Any new structures should be small, hacienda type Eco-friendly structures that serve as a model for conservation.</p>
<p>Southwest ambiance and character. Art supply store. Clean up the vacant lots - trash, dead trees etc.</p>
<p>Please do not completely change the charm and feeling of Carefree. That is the primary reason most of the residents moved here. I hear people suggest that we need to do more business in the town center and I ask why? What is the town trying to achieve? Bigger is not necessarily better.</p>
<p>Love the rural feel &amp; small town feel, nice to not have to deal with traffic, keep Carefree unique with out franchise stores or chain fast food outlets. Keep Carefree peaceful and serene as it's name and founders intended.</p>
<p>I moved here 20+ years ago because Carefree was a quiet, affluent community. I don't want to see more tourists, businesses, condos or additional businesses move into the area. Too many snowbirds already that spoil it for us that live here full time.</p>
<p>Support the idea of condos over retail/office space. Very opposed to new city hall, government building.</p>
<p>the town has made this area so very beautiful. We walk there often (now with the grandchildren) and visit the park and walk the paths. Thank you for the careful attention to this lovely detail. I would say one change I would make is to the Iguana slide. Because it is also used for pet droppings, which I know really can't be helped. If it was not sand and rubber instead that would keep the puppies off and keep it more sanitary for children.</p>
<p>One complaint that has really escalated in the last 5 years is the noise from the Cave Creek bars (Harolds/Buffalo Chip; maybe others.</p>
<p>As I asserted to previously, we have been here (same location, which is just over one mile South of Cave Creek Rd, Harolds ) for almost 30 years and this has never been a problem before. My husband and I love the fact that these places are busy; they are doing well and bringing the town revenue. We would just ask that there be a respect to the sound decibels' when they are outside. Sometimes it is so loud that our widows are shaking; and even with the windows closed we can hear clearly the words of the MC and the musicians. Again this has only been the last 5-6 years and we have never made a complaint before.</p>
<p>Having been in real estate, it concerns me that if this goes unchecked and not monitored according to law, it will hurt property values North of Stage Coach.</p>
<p>Thank you</p>
<p>We just purchased a new home within walking distance of the sundial so we could live close to the town center. Carefree just needs more of a population.</p>
<p>I moved from North Scottsdale to Carefree and like the small town feel. That said change is inevitable and I appreciate your asking for input.</p>

**Carefree Village Center Master Plan  
Consumer Survey Response  
Carefree Resident**

no more signs!!!, the circle is so dangerous for our seniors. big lights used at Christmas etc turned off sooner. Some people work on weekends and holidays too. Do we need fireworks? Some military people can't take them. so many people speed, the police seem to be out during summer months instead of winter too. Imagine if we had more to do downtown Carefree. People need to say hello at the post office. I do and I hold the door open. Very interesting little town we have. Lets all be The City of Carefree Town Center des not need to attract any more individuals to the area than it already does. I moved here for the small town atmosphere and I don't want us to become Cave Creek full of bars, drunks and excessive traffic. It's bad enough that it already spills over to the residents of Carefree. Close it down .Carefree is a residential town.If you want a business move to the circus town called Cave Creek and open a biker bar Promote noise ,drunkenness speeding and a general disregard for the residents..

Town Center buildings that presently exists need to be refreshed. Need to improve the occupancy rate on the existing buildings prior to building additional building

Continue with a solid Town leadership foundation that will attract cultural activities and all types of restaurants and specialty shops.

We support the concept of DFT and would also like to space to be used for concerts.

Need more sidewalks and bike paths.

We need more business opened in the evenings,We need a starbucks to have coffee with friends and walk around.

Carefree needs more locals; not more retailers-build lots of condos and apts. in the town center. in order to boost foot traffic.

Encourage businesses like Starbucks; Trader Joe's, etc.

Support local businesses more than visiting road shows that might benefit town coffers but reduce retail income.

Don't block the streets during road shows.

Encourage an evening adult education center (YMCA style) etc.,etc.

I think the mayor and council need to focus on minimizing waste and be more business friendly. Why do they want 4 year terms?

I moved to Carefree 20 years ago because I wanted to live in a quiet small town without a busy downtown and lots of traffic and commerce.

beautiful Palo Verde trees and make the core more quaint and clean! How about some hanging plants around the Los Portales Mall. Also take the white covering off the Stained Glass on the roof so the color can shine thru the ceiling of the Mall. duh! More stuff at the Theater, like a local talent show. Dumb dog tricks etc....Local musicians and maybe music all over down town center ( like Sirius Radio) from remote speakers.Basically clean up the down town. Repaint the yellow and red along the curbs. Make sure the water coming out of the drinking fountains actually comes out of the nozzle of the fountain so one could actually get a drink. The Garden is Dog Friendly so why not self filling water stations for the doggy's. Fix the Sundial Fountain back to original and replace the "devils star" that used to hang from the mollusc. Make it like it was!!! Maybe have a Car Show with a street dance. And not just old classics but New Cars too. BUT DO NOT PARK UNDER THE SUNDIAL THAT SPACE SHOULD BE SACRED GROUND MR SANDERSON!!! NOT A CAR LOT! ( everyone in Carefree agrees it looks so stupid with cars under the Sundial) Spend some money and get a real music band or individual musician or even some GREAT cover bands! Have a Chilly cook off with competing fire houses around the foothills.... By the way.. lets say you get a great cover band and they play at night tell the merchants to stay open that night. Where I grew up in Redlands Ca. the downtown stores would stay open till 9pm every Friday night from The Friday before Thanksgiving till the Friday before Christmas with a street dance every Friday night. There was food and drink and music from a local bands. Let the people bring things to sell for Christmas gifts or have a Cake and Pie sell and competition. If you need help with the cost have a 50/50 raffle at a \$1.00 per ticket or 6 for \$5.00 which is drawn at the end of the night (at 9pm) with winner present! Maybe have give aways from the local merchants like a free dinner at a local restaurant for example. Raffle everything for the \$'s. Have a BINGO night with plenty of new wine for sampling..PLEASE TAKE NOTE: IF YOU Lets not spend more than our community can afford. This is not the time to raise taxes. Don't spend money just to spend it or just because it's in the bank. get people to live in the town center with boutique shops for food and home accessories

Carefree Village Center Master Plan  
 Consumer Survey Response  
 Carefree Resident

Vibrant, active, beautifully displayed boutique stores and restaurants with unique flavor combined with a well lit, landscaped area and a mecca for all town cultural events...a home fun! Live theater, music, mimes in the park, concerts, evening movie night under the stars with wine/beer/refreshments...a delightful way to spend the day or evening. Outside patios, pedestrian walkways and a way for bikes to get to the town center safely and park safely. More parking: Government ruined the Town Center over the past many years (including this administration).. Fire House is NOT inviting, Post Office is OK, but further adds to GOVERNMENT Bldg control of town center. The Crème de la crème was when the Town Center had the Gaul to TAKE potential INCOME PRUCING/RETAIL/Business space on Cave Creek Rd (Space that could of been a draw for guests, now DETERS them!). Tsk Tsk on the Town "Planner" and cronies that approve this kind of mis-direction! Now all it seems that we are trying to do is a "Band aid" to salvage the space/

Spending money on new public buildings for the arts or culture center is foolish when there are places within five miles or less and those have had issues meeting It is the retailers responsibility to attract business by their marketing and service. The should make the business environment more business friendly not subsidize their business! A lower sales tax rate would make it more attractive to shop downtown and controlling the town spending better.

Please no more galleries. A cultural center with live theater and music performances would be very nice. Please don't make anything taller than two stories. Maybe 30 ft max. You need to keep the views of Black Mountain and all of the open scenery. Whatever you do, there needs to be a balance.

I don't like the seasonal restaurants because they are closed all summer.

Improve Bike Paths

Create a pedestrian area

THIS TOWN HAS BECOME A TOUR AND HEAVILY TRAFFICKED PLACE TO LIVE. NOT WHY WE MOVED HERE IN 1990. WE DON'T SHOP HERE MUCH WITH THE EXCEPTION OF BUSINESS WHICH HAS gone down hill product quality wise. We would prefer to see less activity (traffic through the town virtually uncontrolled) and noise at night. Get a speed camera (simulated only to avoid legal issues) and reduce the speed limit to 15mph at the turnarounds and extend that slower speed further to the south on Tom Dar. to Spur Cross. Enforce noise ordinance. Put in cross walk at Carefree Dr and Tom Dar.

The neighborhood art tours only seem to bring in trash left on the streets and more security issues not to mention the noise and traffic at night.

The neighbor living on 37488 No Piedra Grande between Carefree dr. and Bella Vista runs a yard sale business almost every week during the winter season and uses the front L/S area of Hawks Nest as sign advertising. Allowing this kind of activity really cheapens the neighborhood. I believe this operation is being run by a current and former employee at the building department in Carefree who lives at the yard sale address.

The worst thing that's happened to this town is the evening noise from the bars in Cave Creek. Its a residential killer for this town. Please put pressure on Cave Creek to eliminate the outdoor night time events.

with the improvements of the last 10 years, little more needs to be improved except for more businesses and the remodeling or demolition of Los Portales and Spanish Village. The Magic Bird festivals are little help to the town as they are of poor quality and do not bring in people that spend money in the town's businesses.

Need to do something about all the vacant buildings. I go get my mail up there and need a reason to shop/ stay there... Nail salon, movie theater, more restaurants we like the open area without walls.,no fast foods,no high buildings,keep the farwest village spirit

Love the idea of desert foothills theater with other uses adjacent to town hall. I think this would help to anchor the town center and bring more people.

We need night time activities. I read about a performing art theater and seen this work to add activity in the evening. Would be gret way to attract new dining options and help existing restaurants.

I think a live theater would be a great addition and bring more people to the Town Center in the evening to support our great restaurants and bring others.

The gardens (incl the slide & playground) are a positive draw in the community. Many Carefree residents are retired and/or seasonal visitors who already have homes and closets filled with beautiful things. They may window-shop, but for them it's all about new experiences. Younger people are relying on the big box stores to stretch their family \$\$\$. I don't know how Carefree can compete with that. Has any thought been given to partnering with Cave Creek a couple of times a year... maybe the Cavefree Brew Fest or the Care Creek Marathon. Bottom line... I think that people are simply tired of shopping.

Carefree Village Center Master Plan  
 Consumer Survey Response  
 Carefree Resident

<p>Any thing would be an improvement over the mish mash of tourist junk stores</p> <p>I have lived in Carefree for 30yrs. I think the local shops in Carefree need more support from the town to help there business.</p> <p>Moved to this location to avoid crowds. Disgusted with the circus-style signage everywhere. Too small of population to support anymore local restaurants. When dining out, Scottsdale has EVERYTHING available in close proximity</p> <p>We are full time retired local residents. At this point in our lives our day to day purchases tend toward food, clothing, gasoline, restaurants and movies because we don't need more furniture, cameras, dishes, audio, etc. In short, we don't need more things. We need quality stores and restaurants so we don't have to drive to Scottsdale to find them. Their addition would also make Carefree more of a day trip destination to make up for the lack of population density in the area.</p> <p>Activities should be targeted at high end adults, not children as the Christmas Festival is</p> <p>The extra sales tax is what kills Carefree businesses. Why would I pay the extra 4% just to shop in Carefree?</p> <p>We do not like the special festivals. We do not want to attract outsiders to this area. We have enjoyed Carefree as a quiet retirement community--not a vibrant</p> <p>If you wanted tax revenue, you would not have blown the</p> <p>Target, Walmart, or Home Depot opportunities. Most of the folks I know moved here to get away from what you are trying to do.</p> <p>The town center gardens are outstanding, and a source of pride for our community. Maybe you should consider leveling buildings and expanding it to include more floral and fauna.</p> <p>Keep it elegant, simple.</p> <p>Cave Creek pulls in thousands of customers on the weekends - while Carefree seems to close up its sidewalks. I do not want to compete with Cave Creek for bars and motorcyclists - but there should be other "up-scale" venues to attract customers to our town..currently Carefree is UNREMARKABLE except for the "desert gardens" center. Too many empty storefronts and a ghost town feel.</p> <p>We need a theater to help bring better dining options to town and create additional recreation options after the sun goes down.</p> <p>Support year-round residents preferably. There was an excellent chance watching stars. Reckless installation of lights have polluted the night-sky. Our ridiculous mail disservice has been a hindrance of substantial business</p> <p>We lived in a community that spent a fortune on a performing center. In ten years it all but bankrupted the community and raised the local taxes.</p> <p>We came here because it was quiet. Now there are too many activities, especially during the winter. The weekends in the winter are awful with all those festivals. During the last 15 years the quality of life in Carefree did not improve. And neighboring Cave Creek is even worse.</p> <p>The town hall or chambers do not need a new building. We cant even find the money to care for the streets and infrastructure.</p> <p>transportation between Carefree and other specific locations like Cave Creek and maybe Kierland may bring more shoppers, an Ollie Trolley type service maybe.</p> <p>My thought is to make the Carefree town center a success there needs to be food and beverage sites. Updated stores with a competitive price and stores of interest and not stores mostly designed for visitors. Another issue I see is that when you drive through Cave Creek you are able to see the variety of stores from the street as you drive. Carefree, however, remains out of sight and many people unfamiliar with the area would never come to Carefree as they may not know it exists. The first thing though is to find the right mix of stores to attract people from different ages. Word of mouth will help bring attention to an attractive town center, then, concentrate on providing easy access and parking to the town center and make it clear how to get to the town center by posting signs, which is not my favorite option,</p> <p>A wider variety of shops would be great, especially a bakery, butcher, ice cream shop, and more restaurants.</p> <p>The real reason Carefree residents moved here and our guests come to visit is to see the beautiful Sonoran desert. Carefree is a Town and not an Urban Village. We enjoy peace and quiet. We also enjoy art, music and the wildlife in the natural desert surroundings. A boutique hotel and spa with fabulous architecture would do well in the Town Center. Local area residents, however, do not want a lot more traffic, noise or cars parked in front of their property.</p> <p>It is been ignored by our Town leaders and is deteriorating rapidly.</p>
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**Carefree Village Center Master Plan  
Consumer Survey Response  
Carefree Resident**

<p>Parking can be an issue during festivals. If town center condos/residences were increased (desirable) parking will get worse. As a town center business owner, the festivals can be a problem as our customers have difficulty accessing us.</p>
<p>more restaurants</p>
<p>I like the small town atmosphere that the town center has now and would not like a commercial hub. I can head south into main Scottsdale or Phoenix for that. I like the feeling of a small town and community which is there now.</p>
<p>I LOVE the Town like it is.</p>
<p>I would love to see a more vibrant downtown Carefree where there is mixed use property and more local run businesses that are useful to residents so that going downtown is not necessary. live local/shop local.</p>
<p>A museum would be wonderful as well as an expanded farmers market where signage is permitted for market days. More lower priced apartments/condo are necessary as well as improved sidewalks getting to town. Bike path would be tremendous!</p>
<p>What would it take to make Carefree a DESTINATION spot where people go out of their way to come here? More hotels would be appropriate.</p>
<p>Carefree would benefit from less commercial signage. Do not need neon signs, no pawn shops and no gun stores WE look too commercial.</p>
<p>Carefree is a winter destination</p>
<p>The seasonal business is what makes it particularly difficult for the business community THAT WILL NOT CHANGE</p>
<p>Would love to see Las Portales mall cleaned up. It's a eye sore. Would love to see the town become more upscale in all areas.</p>
<p>We do not need apartments in Town Center. This is a small town that enjoys visitors. Carefree needs to help the businesses that are here. The ones that pay taxes here.</p>
<p>As someone who lives and works in Carefree, these questions are insulting. I feel like the ideas of a few "Town Center" merchants or town council members are forcing their ideas on the community. It seems like you have been told a few times by the community that they are not interested in apartments and condos in town center.</p>
<p>You are not taking "no" for an answer. I think you are going to do exactly what you want to do.</p>
<p>Update the lighting at the Post Office, it does not make me feel safe if I need to pick up my mail as the afternoon turns in to evening.</p>
<p>Implementing the Ed Lewis multi-use, condo combination project would be a major mistake</p>
<p>There should be some healthy food stores/restaurants available. Scones and teas, coffee and eggs, are awesome but there is no restaurants where you can get a good salad, soup, etc. Or, a small Sprouts even would be good. I'd be there everyday. Also, doesn't it seem like the post office is prime downtown space. You could move it up the hill or by Bashes and use that space of town center activities, concerts, etc.</p>
<p>The Town should start working with businesses, the Chamber of Commerce, residents, investors and stakeholders to make something of substance occur in what is becoming a ghost town. Instead of inflating town staff and expenses, the town needs to start understanding their brand and taking action to save itself from becoming our restaurants are either excellent and too expensive to eat at very often OR affordable and lack creativity OR they are just badly managed. We never choose to eat out in Carefree. Instead we opt for places like Rancho Manana (special now that Carefree Inn is gone), Oregano's (great on all fronts but too busy to go to often), Lamp Pizza in Scottsdale, or The Grotto Cave for a sandwich.</p>
<p>Landlords need to lower retail space rent to attract businesses.</p>
<p>Reduce the art etc shows to one a year. No good retail would open here because of all the weekends used up by the shows.....</p>
<p>KEEP IT FAMILY FRIENDLY TO ENCOURAGE YOUNG PEOPLE TO SHOP THERE. ALLOW FRANCHISE OPERATIONS. THERE ARE SOME GOOD ONES.</p>
<p>We and 2 other couples used to go to Venues regularly, bringing us to the Town Center, galleries, etc., but the customer service was so poor that all of us have stopped going. It is very important that whatever establishment is the biggest draw for a particular person or family not sabotage other retailers by reducing trips to the Town Center. You-all depend on each other! Each establishment needs to provide a great customer experience, so that the community's desire to repeat and increase its</p>

**Carefree Village Center Master Plan  
Consumer Survey Response  
Carefree Resident**

Parking can be a problem with activities. If bus service came up to carefree might help stores. I believe the business people would know what is needed. black mountain, Ortega ,tea room , sun dial cafe all do well along with the jewelers who are very friendly. It's nice to have real estate offices but not over run. When you have no draw you get no people. Need a good variety of stores.many that are successful would be your best indicator of what is needed. Ask them.

I would hate to see Carefree become commercialized. I would like to see all spaces utilized before anything new is built. I would enjoy more of a cafe inspired feeling Please keep the charming character that made Carefree appealing. Increase in businesses and residences needs to match the current population and not try to be larger than it should or will be. We love Carefree for its quaintness and natural fit in the desert foothills.

Love Carefree as a whole, however, the restaurants are awful so we don't eat there and go to Per Wei when we want inexpensive yet good Asian food. Venues is limited and way too expensive and the food is mediocre. Same with Binks Cafe, where the service is awful. We've heard it from many. Pizzafarros used to be good but it is terrible now and expensive. The Chinese restaurant in Bashas center is just dreadful. Other area restaurants are the same. Sorry to be negative but it's the truth from our perspective. Carefree needs to attract energetic, unique restaurants of high quality with some ethnic offerings that will draw people from all over. Who says they go to Carefree for the great restaurants and dining experiences? Shops should be interesting and eclectic. We'd LOVE a store like Whole Foods and Carefree is the perfect place to have one! Carefree should also be advertised and projected as an arts community. More public art in the gardens and elsewhere, more concerts, more Do not shop in Carefree or Cave Creek because of inflated prices. Rents should be adjusted.

I would like to see more nightlife (restaurants, shops open) in the evening

We would like to see the Easy Street project completed.

You need the mixed use plan tried a few years ago.

The Ed Lewis project is critical to Carefree. Making that happen should be the top priority.

Please, please, please bring more small businesses & restaurants, museums, etc. to Carefree.

I agree improvements are needed to attract people to the town center, however, added residential homes are not necessary or appealing. We have an ample variety of town homes, condos, apartments & assisted living homes already. Would love to see Trader Joe's in town.

None at this time.

Too much government buildings.. Carefree is a bedroom community.

Question 14 forces an answer, we are retired and there is no work zip code

Vibrant small town feel

Need businesses that cater to residents. No more Southwest trinkets. Doesn't even appeal to most visitors today.

Stores with good merchandise, restaurants, breweries, family friendly activities

No work zip code. I'm retired.

Currently the town is offering things that appeal to children (park & Santa etc) as well as adults (arts festivals, tea room). I think more activities that appeal to a broad demographic would be good.

Lived here 15 years and still can't tell you what is downtown other than bashas and ace hardware. Completely unaware probably due to non existent or poor advertising/marketing. This is true for both the town and most of the individual businesses. Partly, the businesses along Tom Darlington do nothing to inspire people to "turn in" to the downtown area. Cave Creek, for example, provides an interesting assortment of storefronts that actually cause people to SLOW down and see what is down that side street or behind that building.

need to attract eateries like Orgenos that went into Cave Creek, lower cost and family directed.

Get Bashas to put up a large BBQ tent in parking lot. for sell and tell

Already live in town center. Deli and pub would be nice.

Carefree Village Center Master Plan  
 Consumer Survey Response  
 Carefree Resident

There are not enough customers in the summer months.
Needs a change but I do not know if anything will work. Cave Creek is more interesting and I do not know if our limited population will support new business.
We need to get additional restaurants established in the town center. Middle of the road restaurants not just high end.
I like living in Carefree. There are plenty of restaurants, grocery stores, hardware and other desired shopping is close by in metro Phoenix. I like the quiet of living here with the activity of the city close by. I LOVE we have no stop lights. I LOVE we have no fast food. Life is good here!
Upgrade the Basha store to a better grocery store to serve as a daytime anchor. Put in art house/independent films cinema for evening anchor. Don't bother with adding residential. Thanks for all your hard work for the town. Good idea to do a survey.
Assisted Living for elderly residents
Would love to see a Trader Joes here. Also things like yoga studios, pilate studios etc.
The town of Carefree is a jewel! Please preserve the small town atmosphere, but add some class. The retailers should be unique and upscale and the entertainment and restaurants sophisticated. We should be attracting those kinds of visitors.
Good questions.
The loss of the big restaurant in the center is a huge loss.
Carefree town center desperately needs a facelift and reason for people to go there. It needs a atmosphere of living and shopping like Carmel California.
Any and all efforts should be made by this town to jump start the Butte Property expansion. We don't need a community center for performing arts. need to bring in new businesses that attract more families
A nice movie theater showing good movies as Camelview5 and Shea 14 will attract more people down town in Carefree than anything else .
PRESENT STORE OWNERS SHOULD BE MORE WILLING TO LEASE SPACE AND MAINTAIN THE BUILDINGS THEY OWN .TOO MANY VACANCIES DUE TO ATTITUDES OF
Why require a work zip code for the many residents who do not work in Carefree?
The garden area is very attractive and unique, but probably not much of a tourist "destination" by itself. Is there perhaps a way to expand upon it by having daily docent-led tours (could be led by local volunteers), or a butterfly pavilion, something artsy that botanical gardens have to offer (Chihuly exhibit), or an adjacent animal rescue (Wild at Heart) facility (bringing Sonoran fauna and flora together)? As it is today, it's fine for a short stroll and as "eye candy" for the Carefree Town Center, but not so much as a "destination attraction".
We need more later evening places to dine and have a cocktail.
More bars and nightlife. Walking paths. Bike paths along cave creek road btwn carefree and desert mtn
The current town center looks run down and outdated. "Spanish Style" is no longer appealing. Carefree would be better off shedding its "retirement community" status, because the retirees don't go out to the local businesses. DOWNTOWN needs to be cleaned out and started over, with a design theory that carries through the
Need signs saying walk facing traffic
Need walking & bike paths
Need to cut bushes back from street for walkers
Bike & walking paths would be great in the Carefree/Cave Creek areas



Carefree Village Center Master Plan  
 Consumer Survey Response  
 Carefree Resident

<p>Saturday morning farmers market instead of Friday so people with jobs can participate.</p> <p>Family movie night in amphitheater with food trucks</p> <p>Food truck weekly visits</p> <p>Specialty grocer with fresh prepared meals, butcher, bakery</p> <p>Casual dining options like Chipotle, Pei Wei, Zoe's.</p> <p>Less art festivals. They do nothing but block town for the residents.</p> <p>Reopen Carefree Drive as a thru town road. By closing it the town has diverted the traffic around town center. The planners of the town wanted it to be the gateway into town. Now people have no reason to drive through town center.</p> <p>Weekend, street side dining with music, ala St. Marks Square in Milan, Italy</p> <p>Whole Food or Sprouts</p> <p>Help with the shops and stores that are already there instead of "filling it up with residences". This would harm the ambiance of the "real Carefree" and trying to emulate Kierland. It would be ashamed to destroy the ambiance of my Town. Thank you.</p> <p>Having a Trader Joe's or Whole Foods or other organic specialty market</p> <p>Thank you for providing this consumer survey.</p> <p>Whatever development is done maintaining a quiet, desert atmosphere is critical. Harold's is about as close as it should be to Carefree.</p> <p>Should retain its charm. Artsy, something like Taos or Santa Fe</p> <p>I have lived in Carefree for 7 yrs and have never shopped in any store in the town center. I don't even know what stores are there. Everytime I think of going to explore, parking is such a hassle I just give up.</p> <p>Parking and constant closing of streets is the biggest inhibitor to businesses in Carefree.</p> <p>Western atmosphere and a fun place to bring friends...the summer heat will hamper town activities June thru September...</p> <p>Carefree should be an enclave of serenity and calm with a variety of nice shops that appeal across the board. Places like the English Tea Room are the best examples of businesses that have great customer service, great products/services and give everyone in Carefree a place to relax and "hang out" . we don't want Carefree to become like Desert Ridge or the Scottsdale Rd/101 corridor - that's too commercial. It's also a shame that El Pedregal isn't more developed and lowers its lease rates to get good retailers in there (along with Stefan Mann) - Chico's, etc. that would appeal to the clientele in the area.</p> <p>Offer uniqueness. Promote the area, the history, the flora &amp; fauna. Art &amp; music, and things that aren't available at other cities. Evening trolleys or carriages. Music, late night events (later than 8pm). Trolleys that take guests during the day around carefree. Bring in more unique places that draw people to the marketplace. Offer affordable rents for small merchants.</p> <p>If the pricing of goods in stores and art &amp; craft shows continues to be very high (far from competitive), don't expect to make any money. Lots of lookers... very few</p> <p>New buildings or extensive remodeling of old ones. A few new restaurants and better quality merchandise in the local stores. More parking areas for special events.</p> <p>Pedestrian and bicycle friendly downtown. Plentiful green/natural desert space, minimal concrete!</p> <p>As a 20 year resident, I go downtown for mail, the hardware store and to Bashas for groceries. My Dentist is also there. Downtown Carefree seems to be oriented for tourists. I have never seen any notable advertising that would attract me there for any other reason. We have eaten downtown a few times but have found it to be expensive for what we like. We do enjoy using the Farmer's market.</p> <p>A lower sale tax rate would attract more spending in the town core.</p> <p>I like what has been done in the landscaping, shade cloth awnings and events that are held there. Need more places to stop and linger.</p> <p>None</p> <p>Think about Solvang, CA. Great mix of high end/ low end/ restaurants / speciality. Sure it's Danish, but Carefree could be Southwestern.</p>
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**Carefree Village Center Master Plan  
Consumer Survey Response  
Carefree Resident**

<p>Allow it to evolve on its own or devise a coop plan to entice the landowners to invest in their properties and upgrade their appearance</p> <p>We should focus on health food shops, biking lanes, affordable restaurants \$15.00 entres, live theatre, movie theatre, brew pubs, museums, parks and fun..</p> <p>Carefree is no longer a "destination" like it was years ago. It should focus on enhancing the center for those who live here and not work so hard to bring in temporary interlopers that close down the center. If we wanted to live in town, we would move to Kierland.</p> <p>Do not need Town Hall at this time. Town needs entry gateways.</p> <p>town should spend more on maintaining streets and NO CULTURAL CENTER</p> <p>it needs new management. I read some notes about how to improve traffic to Carefree and the mayor said, "Put some lighting on the signs." With that kind of leadership, Carefree is going to stay the way it is. DEAD. It will never be the vibrant Cave Creek but it has to find it's niche. Without that, it will stay a poor neighbor run by a bunch of poor leaders. This survey shows the leaders have no clue.</p> <p>Small town charm that needs cultural attractions, reasonable restaurants, bakery-café, deli, specialty grocery, green space and good street design.</p> <p>Cheaper rent for business so they stay more than one season. Chain stores n restaurants.</p> <p>I believe we need more restaurants of different types as well as cultural and artistic venues.</p> <p>For most people, Carefree is just a place for festivals and galleries. There is no real day-today draw. It lacks higher energy restaurants and shopping. Outside of Basha's and Ace, there is no familiar retail bolstering the locals shops. I'm not saying we should fill our town with chain establishments, but we should have goods and services that meet daily needs that we currently have to leave our town to get. We need a couple of mainstream, family friendly, moderately priced restaurants.</p> <p>Lastly, many of the current retail strip centers are not charming and really need a facelift. They send a signal that Carefree is not with the times.</p> <p>A New Town Manager</p> <p>I would prefer very little change, with perhaps a little more selection of businesses for residents, but nothing major. The is plenty of selection for most necessities Please refer to specific questions. Shared my thoughts there. But, to reiterate to some degree -- need places to buy real household &amp; gift merchandise. The closest place to buy a towel is Target. If you want good towels, the closest place is PV Mall. For a real shopping experience with upscale merchandise one has to go clear to Fashion Square! I cannot buy a nice gift for a wedding or new baby locally, at all. Nor, can I buy myself an outfit, etc., etc., etc. Farmer's Market availability is only Friday AMs. Who goes when you are working in Scottsdale at the time? You need to consider the needs/wants of the working people &amp; Year-round residents as We are opposed to the Ed Lewis Easy Street project, which will destroy the nature and character of Carefree. The town does not need a town hall/theatre complex, which will become a financial burden.</p> <p>I have always thought transportation into Scottsdale or Desert Ridge would be an advantage. More needed than bringing bike riders into town.</p> <p>I think there are enough gift shops. There needs to be something that will attract people to the area. As it is now this is more like a bedroom community.</p> <p>I do NOT like the "SPANISH style" architecture concept for the town center housing, but like the rest of the idea. Carefree has NO style to it's buildings to much of a mix/match. More moderate/elegant style housing would blend better than a specific heavy style like Spanish. Also housing needs to have good use of space for living. It appears town officials are attempting to remake Carefree in an image they have envisioned instead of honoring their oaths to protect it. Pity. Such are the delusions of grandeur those who seek public office embrace. They have to destroy things to prove they are alive instead of accepting their duties as caretakers of the dream not crazy about the "Spanish style character" part of the description - otherwise OK</p> <p>We do not need a theater or condos.</p> <p>Parking can be a bit difficult during events. I would love to see one of the new gyms open that have low costs and lots of cardio equipment. I would really like to see a restaurant back at the old Carefree Station location. The idea of a brew pub is fantastic!</p> <p>* We are not in favor of the Lewis development as it will only add more empty retail space. Carefree is a lovely town and we should strive to maintain its smaller, distinctively carefree, quaint character. That is why we chose to live here!</p> <p>* Question 14 has a glitch. We are retired and do not have a work zip code but this survey will not allow a blank or "retired" or "n/a" answer.</p>
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Carefree Village Center Master Plan  
Consumer Survey Response  
Carefree Resident

just try to get some stores there which offer interesting things and not the same tourist stuff ... a really nice clothing store would be fine ....

We moved to Carefree 20 years ago, as we were impressed with kind of town it was then. A fine residential neighborhood type of town. The huge urge to commercialize it makes no sense to most people we know, and likely will ruin the place.

With the loss of the Heard North, there is a real vacuum in the area for healthy lunch. Would love a Grotto or Janey type restaurant in Carefree. Would like to see a Camelview 5 type independent theatre in area. I don't like going "SOB"

A quiet atmosphere would be important.

Need support for local area

The town center needs a mixture of value (not price) restaurants and easy parking. All the talk about museums, culture centers, and fine arts theater is a waste of time. Look at the Heard and the other "cultural" projects in the valley and how well they are doing.

I think putting in condos/apartments over retail stores (like there are in Kierland) is the most awful idea I've ever heard of. I don't think that type of lifestyle addition to Carefree is appealing and would detract from the area.

Would love to have patio/townhome home with a 2 stall garage. So many of our friends want to scale down but all the townhomes are so old in Carefree. Also under \$

You need another SunDial or some attraction that takes people here - then they'll come to shop . Gotta have a gimmick.

35' tall thermometer ( height of SunDial) LED lights glow to match temperature - Atmosfera Columna - Galileo Galilei JJ ++

I would like carefree to offer an experience to living in an upscale area with awesome dining,french bakery.. upscale shopping.. Much like Kierland commons top notch brand names and get rid of the junk stores.. We need to up our game

It is becoming more pedestrian & bike friendly every year, but need more variety of "consistent" restaurants, coffee shops, specialty shops and year-round cultural

I think interesting public art, such as the desert life bronzes in Wickenburg would be a great addition to the town center. I think a small oldfashioned icecream parlour would be a huge draw. A coffee shop that served Canadian Tim Horton's coffee would draw people from miles around.

# APPENDIX C – ALL RESPONDENT SURVEY TABLES



Carefree Village Center Master Plan  
Consumer Survey Response  
Carefree Resident

Q1. How often do you eat out?		
Answer Options	Response Percent	Response Count
5 or more times a week	7.3%	20
2-4 times a week	42.9%	118
Once a week	38.2%	105
Once a month	9.1%	25
Once every few months	2.2%	6
Never	0.4%	1
<i>answered question</i>		<b>275</b>
<i>skipped question</i>		<b>5</b>

Q2. How often do you come to Carefree Town Center for the following?					
Answer Options	One or more times / Week	One to Two times / Month	Occasionally or Rarely	Never	Response Count
Non grocery retail shopping	52	65	104	49	270
Eating out	64	68	121	22	275
Personal care services (spa, salon, etc.)	20	55	77	119	271
Professional service (legal, accounting, etc.)	8	12	80	169	269
Work	30	3	8	223	264
<i>answered question</i>					<b>280</b>
<i>skipped question</i>					<b>0</b>

Q3. What are the two biggest reasons for you to stop downtown? For those living in Carefree, please identify reasons besides picking up your mail. (i.e. specific establishment, attraction or		
Answer Options	Response Percent	Response Count
Reason One	100.0%	262
Reason Two	90.1%	236
<i>answered question</i>		<b>262</b>
<i>skipped question</i>		<b>18</b>

Carefree Village Center Master Plan  
Consumer Survey Response  
Carefree Resident

Q4. How often do you shop at the following locations/stores?							
Answer Options	More than once a week	Once a week	Twice a month	Once a month	Once every few months	Never	Response Count
Carefree Bhashas Center	122	64	33	20	32	9	280
Scottsdale Summit (Safeway/Target)	72	85	59	33	22	9	280
Carefree Town Center	34	39	36	38	66	58	271
Cave Creek Town Center	16	27	37	43	76	73	272
Desert Ridge	5	21	55	43	105	42	271
Scottsdale Road and the 101	13	38	57	59	70	35	272
Kierland Commons	3	15	38	39	111	69	275
Terravita Marketplace	39	40	46	42	44	65	276
Costco (Cave Creek and 101)	10	34	52	56	40	83	275
Walmart Super Center (Cave Creek Road)	32	43	50	34	44	75	278
						<i>answered question</i>	<b>280</b>
						<i>skipped question</i>	<b>0</b>

Q5. Which of the following events did you attend in the last 12 months? (Check all that apply).		
Answer Options	Response Percent	Response Count
Thunderbird Fine Art and Wine Festival	75.2%	179
Christmas Festival/Electric Light Parade	51.3%	122
Cruise-in at Venues Café	16.8%	40
Sonoran Art Festival	51.7%	123
Indian Market and Cultural Festival	41.2%	98
Chocolate Festival	33.6%	80
Southwest Fine Art and Craft Festival	46.6%	111
Carefree Days	34.5%	82
Veteran's Day Tribute	18.5%	44
	<i>answered question</i>	<b>238</b>
	<i>skipped question</i>	<b>42</b>

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Q6. What TWO TYPES of restaurants would you most like to see in the Carefree Town Center?		
Answer Options	Response Percent	Response Count
Asian	11.1%	31
Coffee Shop	12.5%	35
Italian	6.4%	18
Organic / Healthy	19.6%	55
Bakery	9.6%	27
Delicatessen	21.4%	60
Late Night Eat/Drink	4.3%	12
Seafood	18.2%	51
Banquet Room	0.0%	0
Family Restaurant	14.3%	40
Mexican	23.2%	65
Steakhouse	13.6%	38
Barbecue	6.1%	17
Fast Food	4.6%	13
Middle Eastern	2.5%	7
Vegetarian	3.9%	11
Brew Pub	17.1%	48
Greek	3.2%	9
Breakfast	8.2%	23
Other (please specify)		41
<b>answered question</b>		<b>280</b>
<b>skipped question</b>		<b>0</b>

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**Q7. What of the following attracts you to a shopping/business area? Select ONE for EACH.**

Answer Options	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree	Response Count
A variety of products and services	122	103	42	6	5	278
Quality of products and services	163	95	16	1	3	278
The look and feel of a business area	107	99	54	7	7	274
Friendly customer service	163	98	11	1	2	275
Independent stores over chains	76	76	102	14	6	274
Shopping after 5 pm on weekdays	41	73	123	25	13	275
Shopping on weekends	73	102	84	12	4	275
Convenient parking	117	128	24	5	2	276
Price	83	106	74	5	4	272
Proximity to home or work	102	109	51	9	3	274
Safety (personal, pedestrian and transportation)	98	93	70	6	9	276
Other (please specify)						19
					<i>answered question</i>	<b>279</b>
					<i>skipped question</i>	<b>1</b>

**Q8. Considering the Carefree Town Center, check up to FIVE changes that are necessary for merchants to get even more of your business.**

Answer Options	Response Percent	Response Count
More variety of stores	76.3%	209
Better quality of merchandise	31.0%	85
Better atmosphere	15.7%	43
A greater feeling of safety	1.8%	5
Improved parking	12.0%	33
More places to eat	62.4%	171
More special events	17.2%	47
More competitive pricing	44.9%	123
Better selection of merchandise	62.0%	170
Better customer service	10.9%	30
Consistent store hours	24.5%	67
Evening store hours	18.2%	50
Less traffic congestion	4.7%	13
More advertising	8.8%	24
Other (please specify)		34
	<i>answered question</i>	<b>274</b>
	<i>skipped question</i>	<b>6</b>



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**Q9. Please review the choices listed below. What FIVE potential businesses would you most likely use if they were to open in the Carefree Town Center?**

Answer Options	Response Percent	Response Count
Antiques	9.6%	27
Art Galleries	7.5%	21
Arts/Crafts	9.3%	26
Auto parts	7.1%	20
Bakery	41.1%	115
Books, periodicals and music	22.9%	64
Butcher	23.6%	66
Clothing	22.5%	63
Drug store/sundries	18.6%	52
Electronics and small appliances	6.4%	18
Florist	6.4%	18
Furniture	2.5%	7
Garden Center	25.0%	70
Gifts/knickknacks	7.1%	20
Grocery	20.0%	56
Hardware	3.9%	11
Health club	13.9%	39
Home furnishings	7.1%	20
Jeweler	2.5%	7
Live theater	26.8%	75
Medical/dental services	3.2%	9
Movie theater	42.9%	120
Office supplies, stationary	12.5%	35
Pet supply and services	12.5%	35
Photographic equipment and supplies	3.2%	9
Professional services	8.2%	23
Recreational equipment and supplies	8.2%	23
Restaurants	64.6%	181
Shoes	8.9%	25
Specialty food store	49.3%	138
Video and audio equipment	2.5%	7
Other (please specify)		36
<b>answered question</b>		<b>280</b>
<b>skipped question</b>		<b>0</b>

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Q10. Which community assets/activities would you most like to see come to the Carefree Town Center? (Check all that apply)		
Answer Options	Response Percent	Response Count
Performing arts facility	40.6%	102
Museum	26.3%	66
Concerts and shows in the amphitheater	73.7%	185
Culinary festivals	53.0%	133
Art festivals	35.5%	89
Public art	17.5%	44
Expanded public parking	21.5%	54
Other (please specify)		25
<i>answered question</i>		<b>251</b>
<i>skipped question</i>		<b>29</b>

Q11. Have you ever lived downtown in any community?		
Answer Options	Response Percent	Response Count
Yes	41.1%	115
No	58.9%	165
<i>answered question</i>		<b>280</b>
<i>skipped question</i>		<b>0</b>

Q12. What is your opinion about living in Carefree Town Center?		
Answer Options	Response Percent	Response Count
I am not interested in living in the Town Center in Carefree.	61.8%	173
I might consider living in the Town Center in Carefree given	32.1%	90
I am interested in living in the Town Center in Carefree.	6.1%	17
<i>answered question</i>		<b>280</b>
<i>skipped question</i>		<b>0</b>

Q13. If you moved to Carefree Town Center, what size housing unit would you require?		
Answer Options	Response Percent	Response Count
Studio	0.9%	1
1 bedroom	7.5%	8
2 bedroom	63.2%	67
3 bedroom	28.3%	30
<i>answered question</i>		<b>106</b>
<i>skipped question</i>		<b>174</b>

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Q14. What housing arrangement would you choose?			
Answer Options	Response Percent	Response Count	
Ownership	89.5%	94	
Rental	10.5%	11	
			<b>105</b>
<i>answered question</i>			<b>175</b>
<i>skipped question</i>			

Q15. What type of Carefree Town Center housing would you prefer? (Check all that apply)			
Answer Options	Response Percent	Response Count	
Townhouse	40.0%	42	
Condo	46.7%	49	
2-4 residential unit building	25.7%	27	
5+ unit residential building	7.6%	8	
Flat/Loft above commercial	39.0%	41	
			<b>105</b>
<i>answered question</i>			<b>175</b>
<i>skipped question</i>			

Q16. What price range would you consider?			
Answer Options	Response Percent	Response Count	
Less than \$500,000	54.7%	58	
\$500,000 - \$750,000	34.0%	36	
\$750,000 - \$1 million	8.5%	9	
Greater than \$1 million	2.8%	3	
			<b>106</b>
<i>answered question</i>			<b>174</b>
<i>skipped question</i>			

Q17. Imagine the Carefree Town Center in ten years. How appealing are these future scenarios?						
Answer Options	Very Appealing	Okay	Not Appealing	Don't Know	Response Count	
The center of employment with the addition of new office	41	113	117	9	280	
An attractive place to call home with new apartments, condos	80	83	109	8	280	
An aesthetic blend of greenspace, natural elements,	142	106	24	8	280	
A meeting place and the center of community activities with a	176	73	27	4	280	
A niche place where thrift stores, used merchandise, and	40	63	166	11	280	
A destination retail center attracting people from a distance	60	82	119	19	280	
					<b>280</b>	
<i>answered question</i>					<b>0</b>	
<i>skipped question</i>						

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**Q18. Please tell us about you.**

What is your home zip code  
 What is your work zip code (if retired enter 00000)  
 Number of people living in your household

Home City	Count	Percent	Work City	Count	Percent
Carefree	283	63.0%	Carefree	138	46.3%
Cave Creek	76	16.9%	Cave Creek	60	20.1%
Phoenix	25	5.6%	Scottsdale	54	18.1%
Scottsdale	48	10.7%	Phoenix	23	7.7%
Mesa	2	0.4%	Mesa	1	0.3%
Glendale	1	0.2%	Glendale	2	0.7%
Peoria	1	0.2%	Gila Bend	1	0.3%
Gila Bend	1	0.2%	Palo Verde	1	0.3%
Sammamish, WA	1	0.2%	Sun City West	1	0.3%
Seattle, WA	1	0.2%	Casa Grande	1	0.3%
Gambrills, MD	1	0.2%	New River	1	0.3%
Apopka, FL	1	0.2%	Salt Lake City	1	0.3%
Melber, KY	2	0.4%	Dillon, CO	1	0.3%
Iowa City IA	1	0.2%	Boulder, CO	1	0.3%
Bismark, ND	1	0.2%	Chicago, IL	3	1.0%
Chicago, IL	1	0.2%	Northbrook, IL	1	0.3%
Oklahoma City, OK	1	0.2%	Island Lake, IL	1	0.3%
Boulder, CO	1	0.2%	Bismarck, ND	1	0.3%
Ft. Collins, CO	1	0.2%	Iowa City, IA	1	0.3%
Total	449	100.0%	Northville, MI	1	0.3%
			Melber, KY	1	0.3%
			Schenectady, NY	1	0.3%
			Purchase, NY	1	0.3%
			Chappaqua, NY	1	0.3%
			Total	298	100.0%

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Q19. What is your gender?			
Answer Options	Response Percent	Response Count	
Male	46.8%	130	
Female	53.2%	148	
<i>answered question</i>			<b>278</b>
<i>skipped question</i>			<b>2</b>

Q20. Do you reside FULL TIME in Carefree or other Arizona City?			
Answer Options	Response Percent	Response Count	
Yes	85.0%	238	
No	15.0%	42	
<i>answered question</i>			<b>280</b>
<i>skipped question</i>			<b>0</b>

Q21. What is the zip code of your seasonal/other residence?			
Answer Options	Response Average	Response Total	Response Count
Zip Code			45
<i>answered question</i>			<b>45</b>
<i>skipped question</i>			<b>238</b>

Seasonal Residence	Count	Percent
Alaska	1	2.2%
California	3	6.7%
Colorado	3	6.7%
France	1	2.2%
Illinois	9	20.0%
Kansas	1	2.2%
Michigan	4	8.9%
Minnesota	2	4.4%
Montana	2	4.4%
New York	1	2.2%
North Dakota	1	2.2%
Ohio	3	6.7%
Oklahoma	1	2.2%
Utah	1	2.2%
Washington	10	22.2%
Wisconsin	2	4.4%
Total	45	100.0%

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<p><b>Q22. Please share any other thoughts, comments ideas or suggestions that you have regarding the Carefree Town Center.</b></p>
<p><b>Answered Question: 182</b></p>
<p><b>Skipped Qs: 98</b></p>
<p>Lovely little city that seriously needs some attention. When passing through, it looks deserted. Main crossroads need to be fixed up and make a statement about this small town and its relaxed sophistication. It needs help to show we care.</p>
<p>We miss Carefree Station restaurant. Would love another restaurant to fill that space.</p>
<p>Help businesses and avoid constructing unneeded municipal buildings</p>
<p>A beautiful place to visit.</p>
<p>The idea I've heard of making Carefree Town Center into something like Kierland shopping center is appalling, with condos above retail shops. It does NOT belong in Carefree. We need businesses to fill in all of the empty buildings we already have. The place looks mostly like a ghost town. Most of the current retail property owners in CTC do not seem interested in having a lively, lovely town center. Why anyone other than Carefree residents would want to come here to shop is beyond me. There is barely anything there now. Adding new retail buildings will do nothing if the rest of the CTC is void of businesses. Thank goodness for the various art fairs. At least the Not appealing to visit since there are so many empty stores. Unless going to a specific place not worth the trip to browse.</p>
<p>An addition of a Native American museum, a few upscale casual shoe and clothing stores, but a strong emphasis on the natural beauty of the Sonoran. Less is more when incorporated into the unique landscape with the natural flora &amp; fauna. Any new structures should be small, hacienda type Eco-friendly structures that serve as a model for conservation.</p>
<p>Southwest ambiance and character. Art supply store. Clean up the vacant lots - trash, dead trees etc.</p>
<p>Please do not completely change the charm and feeling of Carefree. That is the primary reason most of the residents moved here. I hear people suggest that we need to do more business in the town center and I ask why? What is the town trying to achieve? Bigger is not necessarily better.</p>
<p>Love the rural feel &amp; small town feel, nice to not have to deal with traffic, keep Carefree unique with out franchise stores or chain fast food outlets. Keep Carefree peaceful and serene as it's name and founders intended.</p>
<p>I moved here 20+ years ago because Carefree was a quiet, affluent community. I don't want to see more tourists, businesses, condos or additional businesses move into the area. Too many snowbirds already that spoil it for us that live here full time.</p>
<p>Support the idea of condos over retail/office space. Very opposed to new city hall, government building.</p>
<p>the town has made this area so very beautiful. We walk there often (now with the grandchildren) and visit the park and walk the paths. Thank you for the careful attention to this lovely detail. I would say one change I would make is to the Iguana slide. Because it is also used for pet droppings, which I know really can't be helped. If it was not sand and rubber instead that would keep the puppies off and keep it more sanitary for children.</p>
<p>One complaint that has really escalated in the last 5 years is the noise from the Cave Creek bars (Harolds/Buffalo Chip; maybe others.</p>
<p>As I asserted to previously, we have been here (same location, which is just over one mile South of Cave Creek Rd, Harolds ) for almost 30 years and this has never been a problem before. My husband and I love the fact that these places are busy; they are doing well and bringing the town revenue. We would just ask that there be a respect to the sound decibels' when they are outside. Sometimes it is so loud that our widows are shaking; and even with the windows closed we can hear clearly the words of the MC and the musicians. Again this has only been the last 5-6 years and we have never made a complaint before.</p>
<p>Having been in real estate, it concerns me that if this goes unchecked and not monitored according to law, it will hurt property values North of Stage Coach.</p>
<p>Thank you</p>
<p>We just purchased a new home within walking distance of the sundial so we could live close to the town center. Carefree just needs more of a population.</p>
<p>I moved from North Scottsdale to Carefree and like the small town feel. That said change is inevitable and I appreciate your asking for input.</p>

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no more signs!!!, the circle is so dangerous for our seniors. big lights used at Christmas etc turned off sooner. Some people work on weekends and holidays too. Do we need fireworks? Some military people can't take them. so many people speed, the police seem to be out during summer months instead of winter too. Imagine if we had more to do downtown Carefree. People need to say hello at the post office. I do and I hold the door open. Very interesting little town we have. Lets all be The City of Carefree Town Center des not need to attract any more individuals to the area than it already does. I moved here for the small town atmosphere and I don't want us to become Cave Creek full of bars, drunks and excessive traffic. It's bad enough that it already spills over to the residents of Carefree. Close it down .Carefree is a residential town.If you want a business move to the circus town called Cave Creek and open a biker bar Promote noise ,drunkenness speeding and a general disregard for the residents..

Town Center buildings that presently exists need to be refreshed. Need to improve the occupancy rate on the existing buildings prior to building additional building

Continue with a solid Town leadership foundation that will attract cultural activities and all types of restaurants and specialty shops.

We support the concept of DFT and would also like to space to be used for concerts.

Need more sidewalks and bike paths.

We need more business opened in the evenings,We need a starbucks to have coffee with friends and walk around.

Carefree needs more locals; not more retailers-build lots of condos and apts. in the town center. in order to boost foot traffic.

Encourage businesses like Starbucks; Trader Joe's, etc.

Support local businesses more than visiting road shows that might benefit town coffers but reduce retail income.

Don't block the streets during road shows.

Encourage an evening adult education center (YMCA style) etc.,etc.

I think the mayor and council need to focus on minimizing waste and be more business friendly. Why do they want 4 year terms?

I moved to Carefree 20 years ago because I wanted to live in a quiet small town without a busy downtown and lots of traffic and commerce.

beautiful Palo Verde trees and make the core more quaint and clean! How about some hanging plants around the Los Portales Mall. Also take the white covering off the Stained Glass on the roof so the color can shine thru the ceiling of the Mall. duh! More stuff at the Theater, like a local talent show. Dumb dog tricks etc....Local musicians and maybe music all over down town center ( like Sirius Radio) from remote speakers.Basically clean up the down town. Repaint the yellow and red along the curbs. Make sure the water coming out of the drinking fountains actually comes out of the nozzle of the fountain so one could actually get a drink. The Garden is Dog Friendly so why not self filling water stations for the doggy's. Fix the Sundial Fountain back to original and replace the "devils star" that used to hang from the mollusc. Make it like it was!!! Maybe have a Car Show with a street dance. And not just old classics but New Cars too. BUT DO NOT PARK UNDER THE SUNDIAL THAT SPACE SHOULD BE SACRED GROUND MR SANDERSON!!! NOT A CAR LOT! ( everyone in Carefree agrees it looks so stupid with cars under the Sundial) Spend some money and get a real music band or individual musician or even some GREAT cover bands! Have a Chilly cook off with competing fire houses around the foothills.... By the way.. lets say you get a great cover band and they play at night tell the merchants to stay open that night. Where I grew up in Redlands Ca. the downtown stores would stay open till 9pm every Friday night from The Friday before Thanksgiving till the Friday before Christmas with a street dance every Friday night. There was food and drink and music from a local bands. Let the people bring things to sell for Christmas gifts or have a Cake and Pie sell and competition. If you need help with the cost have a 50/50 raffle at a \$1.00 per ticket or 6 for \$5.00 which is drawn at the end of the night (at 9pm) with winner present! Maybe have give aways from the local merchants like a free dinner at a local restaurant for example. Raffle everything for the \$'s. Have a BINGO night with plenty of new wine for sampling..PLEASE TAKE NOTE: IF YOU Lets not spend more than our community can afford. This is not the time to raise taxes. Don't spend money just to spend it or just because it's in the bank. get people to live in the town center with boutique shops for food and home accessories

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Vibrant, active, beautifully displayed boutique stores and restaurants with unique flavor combined with a well lit, landscaped area and a mecca for all town cultural events...a home fun! Live theater, music, mimes in the park, concerts, evening movie night under the stars with wine/beer/refreshments...a delightful way to spend the day or evening. Outside patios, pedestrian walkways and a way for bikes to get to the town center safely and park safely. More parking: Government ruined the Town Center over the past many years (including this administration).. Fire House is NOT inviting, Post Office is OK, but further adds to GOVERNMENT Bldg control of town center. The Crème de la crème was when the Town Center had the Gaul to TAKE potential INCOME PRUCING/RETAIL/Business space on Cave Creek Rd (Space that could of been a draw for guests, now DETERS them!). Tsk Tsk on the Town "Planner" and cronies that approve this kind of mis-direction! Now all it seems that we are trying to do is a "Band aid" to salvage the space/

Spending money on new public buildings for the arts or culture center is foolish when there are places within five miles or less and those have had issues meeting It is the retailers responsibility to attract business by their marketing and service. The should make the business environment more business friendly not subsidize their business! A lower sales tax rate would make it more attractive to shop downtown and controlling the town spending better.

Please no more galleries. A cultural center with live theater and music performances would be very nice. Please don't make anything taller than two stories. Maybe 30 ft max. You need to keep the views of Black Mountain and all of the open scenery. Whatever you do, there needs to be a balance.

I don't like the seasonal restaurants because they are closed all summer.

Improve Bike Paths

Create a pedestrian area

THIS TOWN HAS BECOME A TOUR AND HEAVILY TRAFFICKED PLACE TO LIVE. NOT WHY WE MOVED HERE IN 1990. WE DON'T SHOP HERE MUCH WITH THE EXCEPTION OF BUSINESS WHICH HAS gone down hill product quality wise. We would prefer to see less activity (traffic through the town virtually uncontrolled) and noise at night. Get a speed camera (simulated only to avoid legal issues) and reduce the speed limit to 15mph at the turnarounds and extend that slower speed further to the south on Tom Dar. to Spur Cross. Enforce noise ordinance. Put in cross walk at Carefree Dr and Tom Dar.

The neighborhood art tours only seem to bring in trash left on the streets and more security issues not to mention the noise and traffic at night.

The neighbor living on 37488 No Piedra Grande between Carefree dr. and Bella Vista runs a yard sale business almost every week during the winter season and uses the front L/S area of Hawks Nest as sign advertising. Allowing this kind of activity really cheapens the neighborhood. I believe this operation is being run by a current and former employee at the building department in Carefree who lives at the yard sale address.

The worst thing that's happened to this town is the evening noise from the bars in Cave Creek. Its a residential killer for this town. Please put pressure on Cave Creek to eliminate the outdoor night time events.

with the improvements of the last 10 years, little more needs to be improved except for more businesses and the remodeling or demolition of Los Portales and Spanish Village. The Magic Bird festivals are little help to the town as they are of poor quality and do not bring in people that spend money in the town's businesses.

Need to do something about all the vacant buildings. I go get my mail up there and need a reason to shop/ stay there... Nail salon, movie theater, more restaurants we like the open area without walls.,no fast foods,no high buildings,keep the farwest village spirit

Love the idea of desert foothills theater with other uses adjacent to town hall. I think this would help to anchor the town center and bring more people.

We need night time activities. I read about a performing art theater and seen this work to add activity in the evening. Would be gret way to attract new dining options and help existing restaurants.

I think a live theater would be a great addition and bring more people to the Town Center in the evening to support our great restaurants and bring others.

The gardens (incl the slide & playground) are a positive draw in the community. Many Carefree residents are retired and/or seasonal visitors who already have homes and closets filled with beautiful things. They may window-shop, but for them it's all about new experiences. Younger people are relying on the big box stores to stretch their family \$\$\$. I don't know how Carefree can compete with that. Has any thought been given to partnering with Cave Creek a couple of times a year... maybe the Cavefree Brew Fest or the Care Creek Marathon. Bottom line... I think that people are simply tired of shopping.



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<p>Any thing would be an improvement over the mish mash of tourist junk stores</p>
<p>I have lived in Carefree for 30yrs. I think the local shops in Carefree need more support from the town to help there business.</p>
<p>Moved to this location to avoid crowds. Disgusted with the circus-style signage everywhere. Too small of population to support anymore local restaurants. When dining out, Scottsdale has EVERYTHING available in close proximity</p>
<p>We are full time retired local residents. At this point in our lives our day to day purchases tend toward food, clothing, gasoline, restaurants and movies because we don't need more furniture, cameras, dishes, audio, etc. In short, we don't need more things. We need quality stores and restaurants so we don't have to drive to Scottsdale to find them. Their addition would also make Carefree more of a day trip destination to make up for the lack of population density in the area.</p>
<p>Activities should be targeted at high end adults, not children as the Christmas Festival is</p>
<p>The extra sales tax is what kills Carefree businesses. Why would I pay the extra 4% just to shop in Carefree?</p>
<p>We do not like the special festivals. We do not want to attract outsiders to this area. We have enjoyed Carefree as a quiet retirement community--not a vibrant</p>
<p>If you wanted tax revenue, you would not have blown the</p>
<p>Target, Walmart, or Home Depot opportunities. Most of the folks I know moved here to get away from what you are trying to do.</p>
<p>The town center gardens are outstanding, and a source of pride for our community. Maybe you should consider leveling buildings and expanding it to include more floral and fauna.</p>
<p>Keep it elegant, simple.</p>
<p>Cave Creek pulls in thousands of customers on the weekends - while Carefree seems to close up its sidewalks. I do not want to compete with Cave Creek for bars and motorcyclists - but there should be other "up-scale" venues to attract customers to our town..currently Carefree is UNREMARKABLE except for the "desert gardens" center. Too many empty storefronts and a ghost town feel.</p>
<p>We need a theater to help bring better dining options to town and create additional recreation options after the sun goes down.</p>
<p>Support year-round residents preferably. There was an</p>
<p>excellent chance watching stars. Reckless installation of lights have polluted the night-sky. Our ridiculous mail disservice has been a hindrance of substantial business</p>
<p>We lived in a community that spent a fortune on a performing center. In ten years it all but bankrupted the community and raised the local taxes.</p>
<p>We came here because it was quiet. Now there are too many activities, especially during the winter. The weekends in the winter are awful with all those festivals.</p>
<p>During the last 15 years the quality of life in Carefree did not improve. And neighboring Cave Creek is even worse.</p>
<p>The town hall or chambers do not need a new building. We cant even find the money to care for the streets and infrastructure.</p>
<p>transportation between Carefree and other specific locations like Cave Creek and maybe Kierland may bring more shoppers, an Ollie Trolley type service maybe.</p>
<p>My thought is to make the Carefree town center a success there needs to be food and beverage sites. Updated stores with a competitive price and stores of interest</p>
<p>and not stores mostly designed for visitors. Another issue I see is that when you drive through Cave Creek you are able to see the variety of stores from the street as you drive. Carefree, however, remains out of sight and many people unfamiliar with the area would never come to Carefree as they may not know it exists. The first thing though is to find the right mix of stores to attract people from different ages. Word of mouth will help bring attention to an attractive town center, then, concentrate on providing easy access and parking to the town center and make it clear how to get to the town center by posting signs, which is not my favorite option,</p>
<p>A wider variety of shops would be great, especially a bakery, butcher, ice cream shop, and more restaurants.</p>
<p>The real reason Carefree residents moved here and our guests come to visit is to see the beautiful Sonoran desert. Carefree is a Town and not an Urban Village. We enjoy peace and quiet. We also enjoy art, music and the wildlife in the natural desert surroundings. A boutique hotel and spa with fabulous architecture would do well in the Town Center. Local area residents, however, do not want a lot more traffic, noise or cars parked in front of their property.</p>
<p>It is been ignored by our Town leaders and is deteriorating rapidly.</p>

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<p>Parking can be an issue during festivals. If town center condos/residences were increased (desirable) parking will get worse. As a town center business owner, the festivals can be a problem as our customers have difficulty accessing us.</p>
<p>more restaurants</p>
<p>I like the small town atmosphere that the town center has now and would not like a commercial hub. I can head south into main Scottsdale or Phoenix for that. I like the feeling of a small town and community which is there now.</p>
<p>I LOVE the Town like it is.</p>
<p>I would love to see a more vibrant downtown Carefree where there is mixed use property and more local run businesses that are useful to residents so that going downtown is not necessary. live local/shop local.</p>
<p>A museum would be wonderful as well as an expanded farmers market where signage is permitted for market days. More lower priced apartments/condo are necessary as well as improved sidewalks getting to town. Bike path would be tremendous!</p>
<p>What would it take to make Carefree a DESTINATION spot where people go out of their way to come here? More hotels would be appropriate.</p>
<p>Carefree would benefit from less commercial signage. Do not need neon signs, no pawn shops and no gun stores WE look too commercial.</p>
<p>Carefree is a winter destination</p>
<p>The seasonal business is what makes it particularly difficult for the business community THAT WILL NOT CHANGE</p>
<p>Would love to see Las Portales mall cleaned up. It's a eye sore. Would love to see the town become more upscale in all areas.</p>
<p>We do not need apartments in Town Center. This is a small town that enjoys visitors. Carefree needs to help the businesses that are here. The ones that pay taxes here.</p>
<p>As someone who lives and works in Carefree, these questions are insulting. I feel like the ideas of a few "Town Center" merchants or town council members are forcing their ideas on the community. It seems like you have been told a few times by the community that they are not interested in apartments and condos in town center.</p>
<p>You are not taking "no" for an answer. I think you are going to do exactly what you want to do.</p>
<p>Update the lighting at the Post Office, it does not make me feel safe if I need to pick up my mail as the afternoon turns in to evening.</p>
<p>Implementing the Ed Lewis multi-use, condo combination project would be a major mistake</p>
<p>There should be some healthy food stores/restaurants available. Scones and teas, coffee and eggs, are awesome but there is no restaurants where you can get a good salad, soup, etc. Or, a small Sprouts even would be good. I'd be there everyday. Also, doesn't it seem like the post office is prime downtown space. You could move it up the hill or by Bashes and use that space of town center activities, concerts, etc.</p>
<p>The Town should start working with businesses, the Chamber of Commerce, residents, investors and stakeholders to make something of substance occur in what is becoming a ghost town. Instead of inflating town staff and expenses, the town needs to start understanding their brand and taking action to save itself from becoming our restaurants are either excellent and too expensive to eat at very often OR affordable and lack creativity OR they are just badly managed. We never choose to eat out in Carefree. Instead we opt for places like Rancho Manana (special now that Carefree Inn is gone), Oregano's (great on all fronts but too busy to go to often), Lamp Pizza in Scottsdale, or The Grotto Cave for a sandwich.</p>
<p>Landlords need to lower retail space rent to attract businesses.</p>
<p>Reduce the art etc shows to one a year. No good retail would open here because of all the weekends used up by the shows.....</p>
<p>KEEP IT FAMILY FRIENDLY TO ENCOURAGE YOUNG PEOPLE TO SHOP THERE. ALLOW FRANCHISE OPERATIONS. THERE ARE SOME GOOD ONES.</p>
<p>We and 2 other couples used to go to Venues regularly, bringing us to the Town Center, galleries, etc., but the customer service was so poor that all of us have stopped going. It is very important that whatever establishment is the biggest draw for a particular person or family not sabotage other retailers by reducing trips to the Town Center. You-all depend on each other! Each establishment needs to provide a great customer experience, so that the community's desire to repeat and increase its</p>

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Parking can be a problem with activities. If bus service came up to carefree might help stores. I believe the business people would know what is needed. black mountain, Ortega ,tea room , sun dial cafe all do well along with the jewelers who are very friendly. It's nice to have real estate offices but not over run. When you have no draw you get no people. Need a good variety of stores.many that are successful would be your best indicator of what is needed. Ask them.

I would hate to see Carefree become commercialized. I would like to see all spaces utilized before anything new is built. I would enjoy more of a cafe inspired feeling Please keep the charming character that made Carefree appealing. Increase in businesses and residences needs to match the current population and not try to be larger than it should or will be. We love Carefree for its quaintness and natural fit in the desert foothills.

Love Carefree as a whole, however, the restaurants are awful so we don't eat there and go to Per Wei when we want inexpensive yet good Asian food. Venues is limited and way too expensive and the food is mediocre. Same with Binks Cafe, where the service is awful. We've heard it from many. Pizzafarros used to be good but it is terrible now and expensive. The Chinese restaurant in Bashas center is just dreadful. Other area restaurants are the same. Sorry to be negative but it's the truth from our perspective. Carefree needs to attract energetic, unique restaurants of high quality with some ethnic offerings that will draw people from all over. Who says they go to Carefree for the great restaurants and dining experiences? Shops should be interesting and eclectic. We'd LOVE a store like Whole Foods and Carefree is the perfect place to have one! Carefree should also be advertised and projected as an arts community. More public art in the gardens and elsewhere, more concerts, more Do not shop in Carefree or Cave Creek because of inflated prices. Rents should be adjusted.

I would like to see more nightlife (restaurants, shops open) in the evening

We would like to see the Easy Street project completed.

You need the mixed use plan tried a few years ago.

The Ed Lewis project is critical to Carefree. Making that happen should be the top priority.

Please, please, please bring more small businesses & restaurants, museums, etc. to Carefree.

I agree improvements are needed to attract people to the town center, however, added residential homes are not necessary or appealing. We have an ample variety of town homes, condos, apartments & assisted living homes already. Would love to see Trader Joe's in town.

None at this time.

Too much government buildings.. Carefree is a bedroom community.

Question 14 forces an answer, we are retired and there is no work zip code

Vibrant small town feel

Need businesses that cater to residents. No more Southwest trinkets. Doesn't even appeal to most visitors today.

Stores with good merchandise, restaurants, breweries, family friendly activities

No work zip code. I'm retired.

Currently the town is offering things that appeal to children (park & Santa etc) as well as adults (arts festivals, tea room). I think more activities that appeal to a broad demographic would be good.

Lived here 15 years and still can't tell you what is downtown other than bashas and ace hardware. Completely unaware probably due to non existent or poor advertising/marketing. This is true for both the town and most of the individual businesses. Partly, the businesses along Tom Darlington do nothing to inspire people to "turn in" to the downtown area. Cave Creek, for example, provides an interesting assortment of storefronts that actually cause people to SLOW down and see what is down that side street or behind that building.

need to attract eateries like Orgenos that went into Cave Creek, lower cost and family directed.

Get Bashas to put up a large BBQ tent in parking lot. for sell and tell

Already live in town center. Deli and pub would be nice.

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There are not enough customers in the summer months.
Needs a change but I do not know if anything will work. Cave Creek is more interesting and I do not know if our limited population will support new business.
We need to get additional restaurants established in the town center. Middle of the road restaurants not just high end.
I like living in Carefree. There are plenty of restaurants, grocery stores, hardware and other desired shopping is close by in metro Phoenix. I like the quiet of living here with the activity of the city close by. I LOVE we have no stop lights. I LOVE we have no fast food. Life is good here!
Upgrade the Basha store to a better grocery store to serve as a daytime anchor. Put in art house/independent films cinema for evening anchor. Don't bother with adding residential. Thanks for all your hard work for the town. Good idea to do a survey.
Assisted Living for elderly residents
Would love to see a Trader Joes here. Also things like yoga studios, pilate studios etc.
The town of Carefree is a jewel! Please preserve the small town atmosphere, but add some class. The retailers should be unique and upscale and the entertainment and restaurants sophisticated. We should be attracting those kinds of visitors.
Good questions.
The loss of the big restaurant in the center is a huge loss.
Carefree town center desperately needs a facelift and reason for people to go there. It needs a atmosphere of living and shopping like Carmel California.
Any and all efforts should be made by this town to jump start the Butte Property expansion. We don't need a community center for performing arts. need to bring in new businesses that attract more families
A nice movie theater showing good movies as Camelview5 and Shea 14 will attract more people down town in Carefree than anything else .
PRESENT STORE OWNERS SHOULD BE MORE WILLING TO LEASE SPACE AND MAINTAIN THE BUILDINGS THEY OWN .TOO MANY VACANCIES DUE TO ATTITUDES OF
Why require a work zip code for the many residents who do not work in Carefree?
The garden area is very attractive and unique, but probably not much of a tourist "destination" by itself. Is there perhaps a way to expand upon it by having daily docent-led tours (could be led by local volunteers), or a butterfly pavilion, something artsy that botanical gardens have to offer (Chihuly exhibit), or an adjacent animal rescue (Wild at Heart) facility (bringing Sonoran fauna and flora together)? As it is today, it's fine for a short stroll and as "eye candy" for the Carefree Town Center, but not so much as a "destination attraction".
We need more later evening places to dine and have a cocktail.
More bars and nightlife. Walking paths. Bike paths along cave creek road btwn carefree and desert mtn
The current town center looks run down and outdated. "Spanish Style" is no longer appealing. Carefree would be better off shedding its "retirement community" status, because the retirees don't go out to the local businesses. DOWNTOWN needs to be cleaned out and started over, with a design theory that carries through the
Need signs saying walk facing traffic
Need walking & bike paths
Need to cut bushes back from street for walkers
Bike & walking paths would be great in the Carefree/Cave Creek areas

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<p>Saturday morning farmers market instead of Friday so people with jobs can participate.</p> <p>Family movie night in amphitheater with food trucks</p> <p>Food truck weekly visits</p> <p>Specialty grocer with fresh prepared meals, butcher, bakery</p> <p>Casual dining options like Chipotle, Pei Wei, Zoe's.</p> <p>Less art festivals. They do nothing but block town for the residents.</p> <p>Reopen Carefree Drive as a thru town road. By closing it the town has diverted the traffic around town center. The planners of the town wanted it to be the gateway into town. Now people have no reason to drive through town center.</p> <p>Weekend, street side dining with music, ala St. Marks Square in Milan, Italy</p> <p>Whole Food or Sprouts</p> <p>Help with the shops and stores that are already there instead of "filling it up with residences". This would harm the ambiance of the "real Carefree" and trying to emulate Kierland. It would be ashamed to destroy the ambiance of my Town. Thank you.</p> <p>Having a Trader Joe's or Whole Foods or other organic specialty market</p> <p>Thank you for providing this consumer survey.</p> <p>Whatever development is done maintaining a quiet, desert atmosphere is critical. Harold's is about as close as it should be to Carefree.</p> <p>Should retain its charm. Artsy, something like Taos or Santa Fe</p> <p>I have lived in Carefree for 7 yrs and have never shopped in any store in the town center. I don't even know what stores are there. Everytime I think of going to explore, parking is such a hassle I just give up.</p> <p>Parking and constant closing of streets is the biggest inhibitor to businesses in Carefree.</p> <p>Western atmosphere and a fun place to bring friends...the summer heat will hamper town activities June thru September...</p> <p>Carefree should be an enclave of serenity and calm with a variety of nice shops that appeal across the board. Places like the English Tea Room are the best examples of businesses that have great customer service, great products/services and give everyone in Carefree a place to relax and "hang out" . we don't want Carefree to become like Desert Ridge or the Scottsdale Rd/101 corridor - that's too commercial. It's also a shame that El Pedregal isn't more developed and lowers its lease rates to get good retailers in there (along with Stefan Mann) - Chico's, etc. that would appeal to the clientele in the area.</p> <p>Offer uniqueness. Promote the area, the history, the flora &amp; fauna. Art &amp; music, and things that aren't available at other cities. Evening trolleys or carriages. Music, late night events (later than 8pm). Trolleys that take guests during the day around carefree. Bring in more unique places that draw people to the marketplace. Offer affordable rents for small merchants.</p> <p>If the pricing of goods in stores and art &amp; craft shows continues to be very high (far from competitive), don't expect to make any money. Lots of lookers... very few</p> <p>New buildings or extensive remodeling of old ones. A few new restaurants and better quality merchandise in the local stores. More parking areas for special events.</p> <p>Pedestrian and bicycle friendly downtown. Plentiful green/natural desert space, minimal concrete!</p> <p>As a 20 year resident, I go downtown for mail, the hardware store and to Bashas for groceries. My Dentist is also there. Downtown Carefree seems to be oriented for tourists. I have never seen any notable advertising that would attract me there for any other reason. We have eaten downtown a few times but have found it to be expensive for what we like. We do enjoy using the Farmer's market.</p> <p>A lower sale tax rate would attract more spending in the town core.</p> <p>I like what has been done in the landscaping, shade cloth awnings and events that are held there. Need more places to stop and linger.</p> <p>None</p> <p>Think about Solvang, CA. Great mix of high end/ low end/ restaurants / speciality. Sure it's Danish, but Carefree could be Southwestern.</p>
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<p>Allow it to evolve on its own or devise a coop plan to entice the landowners to invest in their properties and upgrade their appearance</p> <p>We should focus on health food shops, biking lanes, affordable restaurants \$15.00 entres, live theatre, movie theatre, brew pubs, museums, parks and fun..</p> <p>Carefree is no longer a "destination" like it was years ago. It should focus on enhancing the center for those who live here and not work so hard to bring in temporary interlopers that close down the center. If we wanted to live in town, we would move to Kierland.</p> <p>Do not need Town Hall at this time. Town needs entry gateways.</p> <p>town should spend more on maintaining streets and NO CULTURAL CENTER</p> <p>it needs new management. I read some notes about how to improve traffic to Carefree and the mayor said, "Put some lighting on the signs." With that kind of leadership, Carefree is going to stay the way it is. DEAD. It will never be the vibrant Cave Creek but it has to find it's niche. Without that, it will stay a poor neighbor run by a bunch of poor leaders. This survey shows the leaders have no clue.</p> <p>Small town charm that needs cultural attractions, reasonable restaurants, bakery-café, deli, specialty grocery, green space and good street design.</p> <p>Cheaper rent for business so they stay more than one season. Chain stores n restaurants.</p> <p>I believe we need more restaurants of different types as well as cultural and artistic venues.</p> <p>For most people, Carefree is just a place for festivals and galleries. There is no real day-today draw. It lacks higher energy restaurants and shopping. Outside of Basha's and Ace, there is no familiar retail bolstering the locals shops. I'm not saying we should fill our town with chain establishments, but we should have goods and services that meet daily needs that we currently have to leave our town to get. We need a couple of mainstream, family friendly, moderately priced restaurants.</p> <p>Lastly, many of the current retail strip centers are not charming and really need a facelift. They send a signal that Carefree is not with the times.</p> <p>A New Town Manager</p> <p>I would prefer very little change, with perhaps a little more selection of businesses for residents, but nothing major. The is plenty of selection for most necessities Please refer to specific questions. Shared my thoughts there. But, to reiterate to some degree -- need places to buy real household &amp; gift merchandise. The closest place to buy a towel is Target. If you want good towels, the closest place is PV Mall. For a real shopping experience with upscale merchandise one has to go clear to Fashion Square! I cannot buy a nice gift for a wedding or new baby locally, at all. Nor, can I buy myself an outfit, etc., etc., etc. Farmer's Market availability is only Friday AMs. Who goes when you are working in Scottsdale at the time? You need to consider the needs/wants of the working people &amp; Year-round residents as We are opposed to the Ed Lewis Easy Street project, which will destroy the nature and character of Carefree. The town does not need a town hall/theatre complex, which will become a financial burden.</p> <p>I have always thought transportation into Scottsdale or Desert Ridge would be an advantage. More needed than bringing bike riders into town.</p> <p>I think there are enough gift shops. There needs to be something that will attract people to the area. As it is now this is more like a bedroom community.</p> <p>I do NOT like the "SPANISH style" architecture concept for the town center housing, but like the rest of the idea. Carefree has NO style to it's buildings to much of a mix/match. More moderate/elegant style housing would blend better than a specific heavy style like Spanish. Also housing needs to have good use of space for living. It appears town officials are attempting to remake Carefree in an image they have envisioned instead of honoring their oaths to protect it. Pity. Such are the delusions of grandeur those who seek public office embrace. They have to destroy things to prove they are alive instead of accepting their duties as caretakers of the dream not crazy about the "Spanish style character" part of the description - otherwise OK</p> <p>We do not need a theater or condos.</p> <p>Parking can be a bit difficult during events. I would love to see one of the new gyms open that have low costs and lots of cardio equipment. I would really like to see a restaurant back at the old Carefree Station location. The idea of a brew pub is fantastic!</p> <p>* We are not in favor of the Lewis development as it will only add more empty retail space. Carefree is a lovely town and we should strive to maintain its smaller, distinctively carefree, quaint character. That is why we chose to live here!</p> <p>* Question 14 has a glitch. We are retired and do not have a work zip code but this survey will not allow a blank or "retired" or "n/a" answer.</p>
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just try to get some stores there which offer interesting things and not the same tourist stuff ... a really nice clothing store would be fine ....

We moved to Carefree 20 years ago, as we were impressed with kind of town it was then. A fine residential neighborhood type of town. The huge urge to commercialize it makes no sense to most people we know, and likely will ruin the place.

With the loss of the Heard North, there is a real vacuum in the area for healthy lunch. Would love a Grotto or Janey type restaurant in Carefree. Would like to see a Camelview 5 type independent theatre in area. I don't like going "SOB"

A quiet atmosphere would be important.

Need support for local area

The town center needs a mixture of value (not price) restaurants and easy parking. All the talk about museums, culture centers, and fine arts theater is a waste of time. Look at the Heard and the other "cultural" projects in the valley and how well they are doing.

I think putting in condos/apartments over retail stores (like there are in Kierland) is the most awful idea I've ever heard of. I don't think that type of lifestyle addition to Carefree is appealing and would detract from the area.

Would love to have patio/townhome home with a 2 stall garage. So many of our friends want to scale down but all the townhomes are so old in Carefree. Also under \$

You need another SunDial or some attraction that takes people here - then they'll come to shop . Gotta have a gimmick.

35' tall thermometer ( height of SunDial) LED lights glow to match temperature - Atmosfera Columna - Galileo Galilei JJ ++

I would like carefree to offer an experience to living in an upscale area with awesome dining,french bakery.. upscale shopping.. Much like Kierland commons top notch brand names and get rid of the junk stores.. We need to up our game

It is becoming more pedestrian & bike friendly every year, but need more variety of "consistent" restaurants, coffee shops, specialty shops and year-round cultural

I think interesting public art, such as the desert life bronzes in Wickenburg would be a great addition to the town center. I think a small oldfashioned icecream parlour would be a huge draw. A coffee shop that served Canadian Tim Horton's coffee would draw people from miles around.