



BYRAM TOWNSHIP

The Sustainable Economic Development Plan

Adopted - Township of Byram Planning Board
Endorsed & Accepted - Township of Byram Council
May 17, 2016

L&G
Planning

JGSC
Group

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IN GRATEFUL ACKNOWLEDGMENT...

The principals of Latini & Gleitz and JGSC Group would like to thank the members of Byram Township's Sustainable Economic Plan Steering Committee; Byram's municipal employees who provided us with unfettered access to numerous Township records; the members of the public who took part in our survey and attended our public discussion meetings; the stakeholders, merchants, and commercial property owners who consented to be interviewed for this project; the Highlands Water Protection and Planning Council for providing major funding for completion of this project through its Plan Conformance Grant Program, Judy Thorton, PP,AICP for her insightful edits; and the Township Manager, Deputy Manager, Mayor and members of Byram Township Council—particularly Councilman Scott Olson and Councilwoman Marie Raffay—for their untiring cooperation and support in this extensive process.

While Byram is well known as the “Township of Lakes,” we would like to add that we found it to be the Township of concerned, helpful people. We are very grateful that the people of Byram Township extended us this opportunity to make this analysis, and offer these recommendations.



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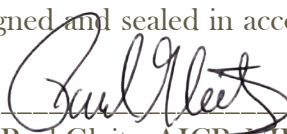
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The original copy of this Byram Township Master Plan Element was signed and sealed in accordance with NJAC 13:41-1.3.


Charles Latini Jr., AICP, NJPP#5721


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INTRODUCTION

-- WHAT DOES THIS PLAN DO? --

Expanding economic development is the goal of almost every level of government, industry groups, various interest groups and the public at large. A successful economy leads to successful businesses that provide workers and their families a chance at financial security for this and future generations, it also helps solidify a community's taxable base. Local government has a particular role to play in promoting economic development. Without the ability to affect interest rates, create international trade policies or to fund investment banks or business incubators, many times the best role of the local government is to try and determine where the market is going and get out of the way.

Reducing barriers to local and regional commerce to locate or expand in the local marketplace, while creating a vision and maintaining standards to ensure safe and effective high-quality development, is a the primary role for local governments in sustainable economic development. When local government partners with its business community, based on regional and local market forces, real progress can be made.

Developing a comprehensive economic development plan for a municipality like Byram creates opportunities based on a number of factors; a vision for the future, analyzing the abilities of market forces to attract certain types of desired development, transportation, and the environment – all coordinated to enhance and maintain quality of life. Very rarely however does the planning process include a Market Analysis that compares what the public and its decision makers may want, juxtaposed with what the market will actually support. This Plan does just that.

This Sustainable Economic Development Plan is designed to provide Byram Township, its decision makers, its business community, and its citizens with tools and guidance in crafting a way forward based on detailed market analysis and comprehensive public input. Recommendations in this Plan will include public actions, such as revisions to land use ordinances, private initiatives, such as events run by the Business Owners Association, and development of up to date data to share with potential developers and investors revealing opportunities and demonstrating that Byram is Open for Business.

VISION**-- WHAT DO WE WANT TO ACCOMPLISH? --****Vision**

In 2026, Byram Township has retained all of its local businesses and has added new businesses based on being a destination for outdoor activities, specialty retail and a variety of dining options. Vacancies in the commercial core are below 5% and retailers in the area are able to draw customers from within town, the surrounding area and from tourists and business travelers from across the region and beyond. The Business Owners Association hosts a variety of events in the community to bring people to the area to discover that Byram is “The Place to Be” and provides updated market data to the commercial development community to remind them that Byram “Is Open for Business”.

Byram Township’s vision for its future is squarely based on strengthening its assets so that all of its parts work together to create a distinctive and prosperous market for growth and economic sustainability. This Sustainable Economic Development Plan works to create a foundation for the Township to foster an atmosphere where companies will seek to invest and take advantage of its environmental assets and unique quality of life – where people of all ages and means can live, work, play and stay.

Byram Township will work to strengthen its place in the regional economy by taking a two-fold approach; the first is aimed at supporting the existing business community by expanding its market reach; the second is aimed at utilizing Byram’s natural and recreational assets and making it the go-to and go-do destination for eco-tourism.

The Township seeks to create a sustainable economy by embracing the three tenets of sustainability; Economy, Environment, and Equity.

- Economy – an attractive place to do and grow business;
- Environment – where natural resources are an integral part of the Township’s infrastructure and economic attractiveness;
- Equity – where residents of all ages and businesses alike are afforded an opportunity to succeed.

Byram Township will be a place where people can live and where business will not only seek to locate, but prosper because of the synergies created through teamwork and cooperation. Byram Township will be a place recognized and respected in the regional economy as an important component of the New Jersey economy.

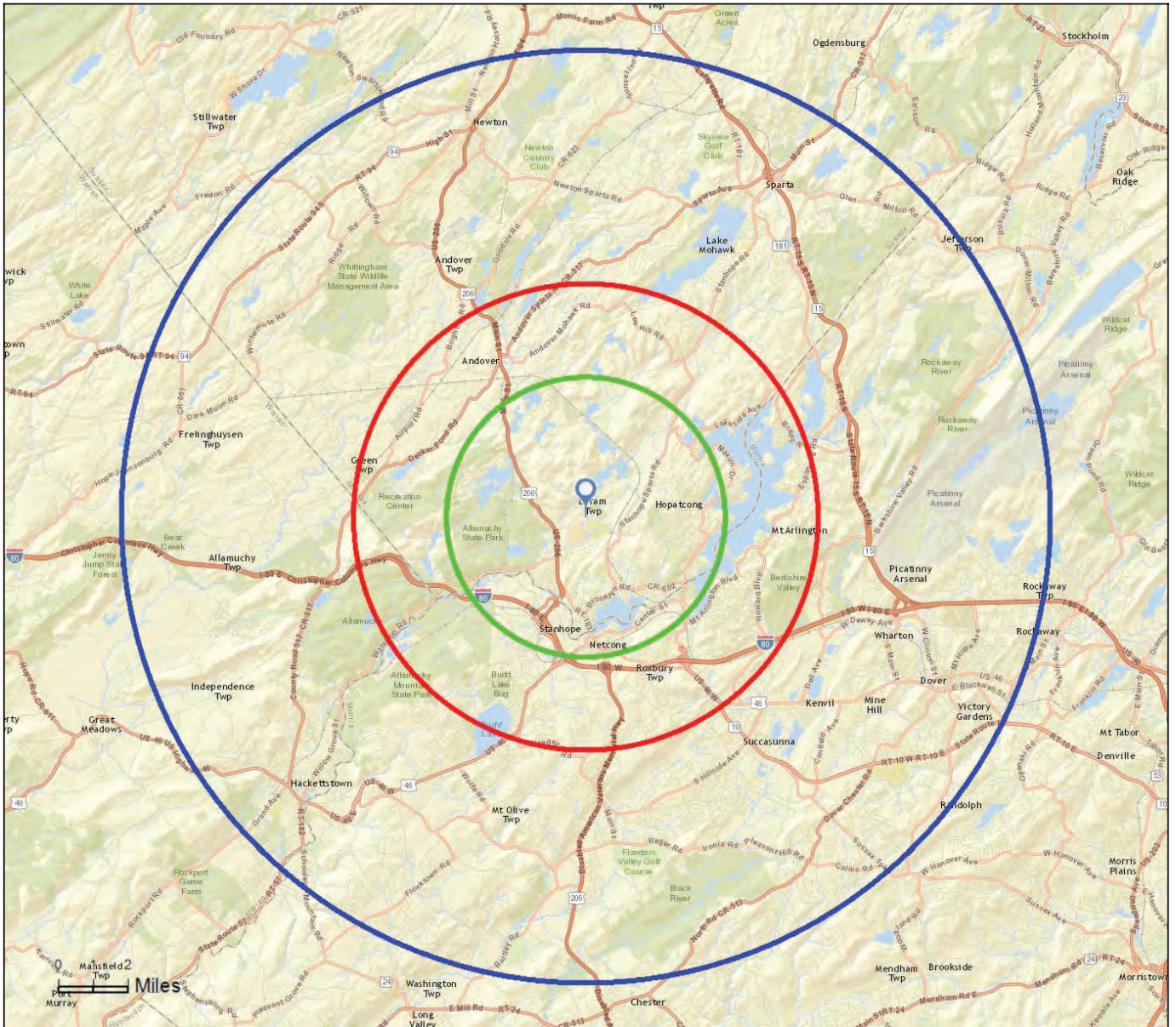


Site Details Map

Byram 3,5,10-miles
10 Mansfield Dr, Byram Twp, New Jersey, 07874
Rings: 3, 5, 10 mile radii

Prepared by Esri
Latitude: 40.93709
Longitude: -74.70656

3



This site is located in:

City: ---
County: Sussex County
State: New Jersey
ZIP Code: 07874
Census Tract: 34037374300
Census Block Group: 340373743002
CBSA: New York-Newark-Jersey City, NY-NJ-PA Metropolitan Statistical Area

The Byram Market Trade Area

Township of Byram
Sustainable Economic Plan

GOALS & OBJECTIVES

-- WHERE DO WE WANT TO GO? --

A goal is defined as a generalized idea, which provides a sense of direction for action. It represents an aspiration, which may or may not be achievable. An objective is a more tightly defined, often quantified, target, the achievement of which is a step toward fulfillment of the goal. The goals as set forth below are not necessarily in order of priority.

Goal 1. Create an environment that supports existing businesses and welcomes new businesses that work with the Township's assets and meet the Township's Vision.

Objective:

- 1.1) Create an identity for Byram Township as the go-to place to do business.
- 1.2) Strengthen the Township's abilities to support growth and economic development.
- 1.3) Ensure that all elements of the Master Plan are in sync with economic strategies and long term marketing strategies
- 1.4) Ensure that the Township Land Development Ordinances foster growth without undue burdens on the business community while maintaining Byram's unique sense of place
- 1.5) Ensure that the resources are in place to make the recommendations in this plan a reality in the short and long term

Goal 2: The Township of Byram will continue to recognize the significance of the regional economy and will ensure that the local economy and associated regulations and programming are ready to accommodate opportunities and be responsive to an ever-changing market.

Objective:

- 2.1) Continue to promote the Township's market opportunities to retailers and developers seeking to enter the local market
- 2.2) Maintain and enhance direct communication and partnerships with local government and business-oriented advocacy groups.
- 2.3) Continue to review and update land use planning and development regulations to provide and respond to new market opportunities
- 2.4) Ensure that necessary infrastructure and public services are available when needed to serve development opportunities
- 2.5) Use strategic incentives to aid in the redevelopment of underperforming or vacant business sites and areas
- 2.6) Maintain a direct dialogue with existing businesses to aid in their abilities to maintain and expand their presence in the community

Goal 3: The Township of Byram recognizes the significant economic opportunity offered by an expanding sports, entertainment, history and eco-tourism market and will support such opportunities and be a direct participant in the attraction, development, preservation and rehabilitation of venues used to support such efforts.

Objective:

- 3.1) Expand and enhance Township, State and private open space and recreation facilities that accommodate outdoor activities, athletic pursuits, nature study/appreciation, and cultural and historic tourism/education opportunities
- 3.2) Conduct and enhance direct communication and partnerships with hospitality-

- oriented, recreational advocacy groups, state agencies, and non-profit trusts.
- 3.3) Maintain a direct dialogue with existing providers of sports, entertainment, open space, historic sites and hospitality facilities and services to aid in their ability to maintain and expand their presence in the community
- 3.4) Develop marketing programming to broaden awareness of and better establish Byram as a destination for eco-/heritage-tourism, outdoor recreation, shopping, and dining.

Goal 4. The Township of Byram recognizes the significant economic opportunity offered by specialty retail and a variety of dining options and supports such opportunities

Objective:

- 4.1) Continue to work with the existing business community to support and expand existing opportunities for specialty retail and dining
- 4.2) Work to create additional opportunities
- 4.3) Update and continuously monitor the LUO to ensure that a variety of these uses remain permitted and that new business types, where appropriate, are accommodated.

Goal 5. The Township of Byram will facilitate smart growth strategies and principles aimed at market trends, in order to accommodate local growth and economic development in an orderly way while protecting the environmental assets from the individual and cumulative adverse impacts of uncoordinated growth.

Objective:

- 5.1) Review and continuously monitor the Village Center Plan to ensure it plays a pivotal role in creating and promoting the goals of economic growth and eco-tourism
- 5.2) Enhance and encourage the retention of existing businesses while establishing new entrepreneurial businesses.
- 5.3) Encourage infill and/or redevelopment of existing commercial sites along commercial corridors.

- 5.4) Work to diversify housing types with particular attention to how housing will be a necessary component of the Village Center's commercial success.



Quality streetscape and building placement that is designed to be attractive to visitors and residents alike will add an element to the Byram economy that is currently missing.

SUSTAINABLE ECONOMIC DEVELOPMENT STRATEGIES**-- WHAT ARE WE GOING TO DO? --****Achieving Byram's Economic Vision**

Exactly how should we capitalize on the opportunities that have been identified? The remainder of this Plan offers recommendations in response to this question.

Achieving Byram's economic vision needs a well-coordinated plan that considers all of the most essential components for making Byram "a place to be." To achieve this vision, the Plan needs to be inclusive of all of the major assets at the community's disposal: people, land use, activity, connectivity, and esteem. The plan developed by the Township takes a comprehensive approach that focuses on place making, rather than just economic development.

A Review of Market Analysis

Using the economic data to find where retail opportunities coincide with Byram's infrastructure characteristics and community preferences, the Plan provides a foundation to begin proactively shaping future markets within Byram.

The Township, primarily for the purpose of supporting the Sustainable Economic Development Plan and Marketing Strategies, conducted a Market Analysis. The study utilized rigorous analytical methodologies to examine the key economic/cultural aspects of the community. The study resulted in a set of five (5) precise conclusions/ recommendations that the community can use to develop strategies for achieving its aspirational vision, goals, and objectives for economic development.

Key Conclusions of the Study:

1. [Eco-tourism] is central to Byram's distinction as a place to do business. The Township is both advantaged and restricted by its location in New Jersey's Highlands Region. The community should utilize the advantages. Outdoor recreation attracts visitors, and provides an opportunity for niche retail in a setting that is appealing and distinctive.
2. [Destination marketing] is needed to support commerce in Byram. For commerce to survive and thrive, outside visitors must be induced to shop and dine here. Attracting new businesses alone won't bring shoppers; marketing must be used to do this.
3. [Retail growth] is difficult, but possible. There is some unmet demand for shopping and dining in Byram, with much more unmet demand within a 10-mile radius. Not all retail will work here, however. To attract visitors from a wider radius, Byram's commerce must be distinctive destination retail. Byram must proactively recruit these targeted retailers.
4. [Housing growth] is possible. There is demand for housing types not currently available in the Township. Additional housing would add \$58,235 per household in retail demand per year. For example, 150 new households = \$8.7 million in new retail spending/year.

5. Byram's commercial core is highway/auto-based. Opportunities exist to create a [walkable commercial district] through new development. This would require a dedicated recruitment effort for developers/retailers, the support of property owners, appropriate zoning, and possibly government incentives.

Key Recommendations of the Market Study:

1. Take action to [retain and support existing businesses];
2. Develop the framework that will allow Byram Township to [take advantage of eco-related assets] and market itself as an eco-tourism destination;
3. [Recruit new retailers] in sustainable categories that:
 - a. Fit infrastructure capacities,
 - b. Take advantage of local eco-tourism, and
 - c. Increase destination businesses in Byram Township;
4. [Generate trial visits] from people within the 10-mile radius;
5. [Review local land use, zoning and development regulations] to support the Plan's vision;
6. [Develop a source of revenue] that will support these activities.



Please note: To better define the assignment of tasks and responsibilities recommended in this Plan, these terms are used in the following section to define stakeholders groups:

- Business/Businesses, Business Community: refers to individual business owners, a business association, or a local/regional Chamber of Commerce.
- Community: refers to the entire group of stakeholders who affect, and are affected by, Byram's economy – residents and their families, non-resident visitors, business owners and workers, and Byram's elected and appointed officials, commissions, committees and volunteers.
- Township: Byram Township's government entity – its elected and appointed officials, commissions, committees and volunteers.

“The journey of a thousand miles begins with a single step.” Lao Tzu



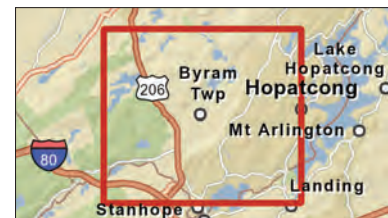
Traffic Count Map

Byram 2-miles
10 Mansfield Dr, Byram Twp, New Jersey, 07874
Ring: 2 Miles

Latitude: 40.93709
Longitude: -74.70656



Average Daily Traffic Volume
 ● Up to 6,000 vehicles per day
 ▲ 6,001 - 15,000
 ▲ 15,001 - 30,000
 ▲ 30,001 - 50,000
 ▲ 50,001 - 100,000
 ▲ More than 100,000 per day



Source: ©2012 Market Planning Solutions, Inc.

June 12, 2015

There are only 8,240 residents of Byram, and they spend \$169 million/year—less than half of that on stores in Byram—for retail goods and services. For businesses to flourish in town, they need to attract the business of outside visitors. If the district were to become a home to destination businesses that could attract outside visitors, the Township could reasonably expect to grow its trade area to a 20-30 minute drive time area. We believe that it would be possible for Byram to serve a secondary trade area of a 10-mile radius around the community:



Major Shopping Center Map

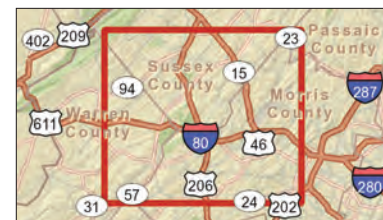
Byram 3,5,10-miles
10 Mansfield Dr, Byram Twp, New Jersey, 07874
Ring: 3, 5, 10 Miles

Latitude: 40.93709
Longitude: -74.70656



Gross Leasable Area

- Less than 200,000 sq ft
- 200,001 - 300,000
- 300,001 - 500,000
- 500,001 - 800,000
- More than 800,000



Source: Directory of Major Malls, Inc.

June 11, 2015

Byram's Economic Vision – Byram, "A P.L.A.C.E. to Be"

The success of any plan is dependent upon the community's ability and desire to implement the necessary actions. Local government will play a crucial role in bringing this Plan to fruition, which may be difficult at times given budgetary constraints, staffing and facility resources. Successful economic development, however, requires partnerships among all types of stakeholder: public/public, public/private, and private/private. The strongest local economies are those where all stakeholders are working together.

This Plan is designed with an understanding that competing interests can be aligned through a well-conducted planning process. A grant from the New Jersey Highlands Council has provided Byram with a solid initial investment, but now the hard work begins.

PLACE – People; Land Use; Activity; Creativity; and Esteem is a simple, yet comprehensive economic development plan that attempts to utilize all of the major assets at the Community's disposal. The five elements that make up PLACE are the ingredients to redefine Byram as a wholesome and vibrant town that has something for everyone.

This is not to say that Byram should try to be all things to everyone, but to use these five elements to find the advantages that Byram has over neighboring municipalities, and then leverage each of them in conjunction with the others to create a successful whole.

This section outlines these elements, and the next section provides recommendations on how to utilize them.



P – PEOPLE:

Groups of people are smarter than experts, and when individuals collaborate as a team, the collective potential is endless. People are the first and most crucial element of this Plan. Individuals making up the Community – local residents, visitors, business owners, and workers – are in Byram for a reason. People keep the local economy running. They work in the offices, run the businesses, and their kids go to local schools. Shop owners and businesses provide goods, services and employment. Private property owners and developers fuel new building and construction activity. The political and administrative leadership ensure efficient day-to-day running of the Township. People are not just numbers and demographics – these are individuals with a vision for their community!

L – LAND USE:

Byram is the Township of Lakes, and its natural resources – open and preserved space – rival that of many municipalities in New Jersey. While located in a rural environment, the Township is still connected to the rest of the state through accessible highways, and within an hour's drive of many places in the greater metropolitan area. Byram has a variety of land uses, and potential to add many more.

Several factors will define how Byram's land use develops, but the two main criteria should be efficiency and desirability. Efficiency is using existing land and resources to best advantage. Desirability is using design, density, variety, quality and the typology of the built environment to create spaces where people want to be.

A – ACTIVITY:

An economic plan should focus on jobs, unemployment, rising market and living costs – and therefore the economy. But that is not all. The Plan must look instead at why people are living and working in the area. What draws them to a particular place? Jobs provide livelihood, businesses provide goods and services, and schools, hospitals and parks provide basic amenities.

Each of these functional parts can be leveraged to provide more to their users. A community center can be an art gallery or host game nights. The school gym can be set up as a playtime theater once a month. A parking area can have a bike rental shop that encourages people to leave their cars for awhile and get on bicycles instead, to ride Byram's amazing trails.

C – CREATIVITY:

A coffee shop can be more than just a coffee shop. It can have books, newspapers, Wi-Fi, board games and jigsaw puzzles. It can provide seating around a fireplace in the winter and chilled lemonade on the patio in summer. Creative thinking makes it more than a ho-hum drive-thru place to get coffee, but "a place to be." Innovation opens the door to innumerable options that will help define where people choose to spend their time and money.

Environment and character are often the most intangible aspects of place making, yet may prove to be the decision-makers for many people. The visual and tactile qualities of a public space, the texture of street art, seasonal activity – farm stands in summer and carols for the holiday season – and human scale all define how people feel about a place.

E – ESTEEM:

Why Byram? This one question will guide the marketing plan – who are the customers, which retailers should set up business here, what events show Byram's brand of eco-tourism. Distinctive character and image will provide the most important marketing tool to promote Byram as an eco-tourism destination. Branding of Byram as a vibrant, family-friendly and eco-conscious place will bring all the ideas and recommendations that form this plan together.

All marketing is not the same, and depending on the target audience, different approaches and materials should be developed. The four main audiences are:

- Residents – current and future;
- Existing businesses;
- Shoppers/visitors; and
- Future businesses/investors/developers.

Residents look for quality of life and a vibrant environment in which to live and work. Existing and future businesses, investors, and developers want a clear understanding of the market and cooperation within the business community. Visitors want to explore and enjoy the best Byram has to offer – open space, active recreation, a quiet weekend. And Byram wants to attract the future businesses, investors, and developers that will succeed in the Township while helping to make it flourish.

Recommendations

Now that we know the ingredients, let's understand the ideas and recommendations to leverage each of them to achieve the Community's vision. The recommendations that follow are presented in order of significance. Each recommendation that follows will have the appropriate element of PLACE ("P" for people; "L" for Land use; "A" activity; "C" creativity; "E" esteem).

Please note: None of these recommendations are made independent of the other. All recommendations seek to drive the sustainable development and future marketability of Byram Township

1. Developing and Growing the Program (Elements P, L, A, C & E)

a) Develop a Source of Revenue that will Support these Activities:

In order to create a successful program, a Community needs a champion. Performing such an effort on a strictly volunteer basis, however, is difficult at-best. This Plan recommends the assistance of an experienced individual or small firm to become the facilitator/liaison for and between the Business Community and Township. Such a position can begin on a part-time basis and use incentive-based bonuses connected to metrics such as fund-raising and/or percentages of ratable tax base growth.

This Plan proposes an initial course of action with tasks that will allow the Community to

pursue its goals – specified by month – over the upcoming year. While led by a paid individual, the Plan also proposes an initial budget for activities, presuming that volunteers will assume the heavy task load, allowing funds to be reserved for services that cannot be volunteered. This includes but is not limited to costs for printing and mailing of marketing and promotional materials, etc. (The Work Plan Calendar, and Work Plan Budget are appended to this report.)

Revenue can be generated through:

- Modest budgeting
- Fund-raising (events, sponsorships and paid advertising)
- Business owners pooling financial resources.

Within a few years, new development should occur, and new retailers, restaurants, and the associated jobs attracted to the area will forge a stronger economy that will be compelling to residents and outside visitors. This should support future/increased investment in the program. Ultimately, the Plan encourages Byram Township and/or the Business Community to go beyond this initial modest budget, and take a very proactive, deliberate role in managing its retail mix, staging attractive events, and promoting its business district as a shopping/dining destination to the wider region.

b) The Mechanism

Businesses are interested in collective marketing and networking opportunities. The Township should seek to assist in creating a platform with and for Businesses to achieve this.

- i. The Township should begin by assisting the business community to create a strong Byram Business Owners Association (BBOA), or a presence as a local Chapter of the Regional Chamber of Commerce. Creating and supporting an organization like this could assist the Community by supporting collective marketing programs, including promotions for and by the Business Community. In addition, such a business group can provide education on best business practices, such as, optimization of hours of operation, social networking and online marketing, effective signage, shared parking facilities, informational and welcoming packets, and cross promotional opportunities.
- ii. The Township should research setting up business promotion and financing tools, such as Business Improvement Districts (BID) and Tax Increment Financing (TIF). Building a team of public-private stakeholders to leverage regulatory and financial authority of the Township through mutual cost and revenue sharing mechanisms. Study the feasibility of forming a Special Improvement District (SID) pursuant to the

Pedestrian Mall and Special Improvement District Act, N.J.S.A. 40:56-65, et seq. The creation of a SID would provide annual funding for business support programs that would be managed by Byram's Business Community.

- iii. Schedule and conduct regular business visits and brainstorming sessions with individual business owners, Township officials, BBOA, and/or Chamber of Commerce (Morris and/or Sussex County), et al., to understand and continuously evaluate the Business Community's needs. Collect and distribute pertinent market, demographic, and regulatory information as appropriate. In addition the group should work to achieve the following initiatives.
 - 1. Implement a small business program to support businesses that are independent, locally owned, and serve day-to-day needs of residents.
 - 2. Implement an incentive program to avoid long-term vacancies of existing commercial properties.
 - 3. Research and recommend a range of incentives to encourage and promote infill and redevelopment as economically viable options.
 - 4. Review and recommend revisions to existing zoning and land development requirements that would help to ensure that they are conducive to infill and redevelopment. Work to identify and attract unique eco-tourism businesses as well as business that could support such objectives.

2. Support Existing Property Owners & New Potential Developers (Elements P, L & E)

One of the most difficult aspects of real estate or business development is the barrier to entry that interested businesses may face – either real or perceived – which often take the form of prohibitive up-front costs. Providing help in navigating the system will promote Byram as a friendly and helpful place to do business – and serve as indirect marketing through experience and word-of-mouth. This recommendation supports the basis for the more detailed analysis of planning, zoning, and administrative procedures of the Township.

- a) Review development processes and procedures and identify areas to simplify or streamline. Public perception, be it right or wrong, is that Byram's local land use approval process is cumbersome and time consuming, ultimately becoming too costly for owners to improve or expand their Businesses. The Township should review its development application and permitting procedures to determine whether possibilities exist for simplifying or making the process easier.

- b) Provide public education documents about the land development and review process to make it less onerous. This can take the form of graphical representations or flowcharts of several development scenarios, such as re-tenanting an existing retail space, developing a vacant land and demolition of existing buildings for the development of a new business.
- c) The Township should develop custom checklists and handouts that clearly explain the development review and approval process. The guides can provide direction on each step of the process, including documents or forms required, fees, etc. This can be an on-line function as well.
- d) Continue to work toward improving the Municipal Complex into a 21st century facility aimed at the needs of a 21st century community in accordance with the Municipal Building Assessment and Municipal Complex Master plan.
- e) Be proactive toward addressing property maintenance and zoning code enforcement

3. Land Use Planning and Zoning (Element L)

a) Density and Design:

Consider the street-level retail along the Route 206 corridor right through Byram's main commercial area and what forms of activity can you see? Is there only vehicular traffic or are people walking to the stores? How many pedestrians, cyclists, dog walkers? Are there trees, lighting, bus or transit stops, community bulletin boards, trash cans, benches, and places suitable for people to sit or meet? Would teenagers skate here? Are there sidewalk events or vendors? Do stores have a stoop or front porch? A bike rack or dog bowls in the front? Is it downtown Byram, or is it just another retail strip in just another town? These are important considerations when assessing how Byram's commercial core might be retooled to strengthen its economy.

Main street revitalization, complete streets, lighting for safety, landscaping and maintenance standards – these are the first step in creating vibrant spaces. Encouraging people to spend more time in public areas vs. in their cars works directly with the Plan's land use planning recommendations.

Given that only 2% of Byram is in the Highlands Planning Area with limited vacant land available for development, it is important to use underdeveloped and vacant properties to their maximum potential. Without detriment to the public health and safety, many existing uses could be expanded or diversified to provide – at a minimum – design integration (e.g., via cross-access and shared

parking), and ideally, increased intensity of development, including mixed-use development with connectivity to adjacent neighborhoods and the future Village Center (VC)).

The Township should work to explore these ideas with private developers and relevant property owners. Where appropriate, policies such as density bonuses, enhanced conditional uses, revenue allocation districts, local district plans and/or the Local Redevelopment Housing Law should be used to support local demand and guide the supply of developable property and associated uses.

The Township must also pressure the NJ State Department of Transportation to change the character of the roadway (State Route 206) as appropriate. This has been done in numerous places nationwide where highways transect a community.

b) Zoning District Review

Commercial/Retail/Office Zoning and Land Uses:

Byram's zoning for the Village Business (VB), Neighborhood Commercial (NC) and Industrial/Professional/Recreation (IPR) zones has been relatively restrictive for some time. The number and types of permitted uses is very proscriptive and the list of prohibited uses is often nearly as long as the permitted uses. The Land Use Ordinances should be revised to simplify and generalize the permitted uses in the VB, NC and IPR zones. Consideration of specific uses being called out is important, however. For example: vape shops, adult businesses, etc., so as to not be confused with general categories such as retail or business services.

The Village Center zone is the largest possibility for new development and will prove to be the greatest opportunity to meet the public vision of a walkable village with distinctive shops and restaurants in the future. The Village Business (VB) zone is the most likely area for change at this time and thus the focus of this plan. Developed in varying degrees, the VB has regional highway frontage and infrastructure improvements in place – for single site development and redevelopment – which could be possible in the near term. Current permitted uses are remnants of the original B-1 and B-2 zones, and read more like an accurate wish list than a concise description of viable uses that can respond to new market forces. This plan recommends that the Planning Board, in cooperation with the Governing Body and the EDAC, review and revise the permitted, conditional and prohibited uses, and provide updated definitions of each, for potential revision of the Land Use Code. To coincide with the recommendation of section 3.a. above, bulk standards should be included in such a review.

i. Permitted Uses:

Preliminary recommendations in this report are to create a shorter and broader list of permitted uses in the commercial zoning districts.

ii. Conditional Uses:

Create a larger list of conditional uses to provide very basic controls for some use and to allow for the expansion and improvement of existing businesses that are beneficial to the overall health of the business district, but might not be appropriate in all locations.

iii. Prohibited Uses:

Prohibited uses should be limited only to those that are clearly detrimental to the safe and orderly development of the zone.

c) The Neighborhood Commercial Zone

While this zone is not as vital as the VB zone, it should also be reviewed in a similar manner. This plan recognizes that the NC zone is smaller and specifically designed for small-scale retail and services to serve neighborhood needs, and is not designed to act as the Township's key component in the regional market. Therefore, the limited nature of permitted uses and the more stringent nature of the prohibited uses are still valid. Consideration should be given, however, to the feasibility and appropriateness of the NC zone along the Route 206 corridor in the northern section of the Township.

d) The Industrial Professional Recreation Zone

This zone is recognized in the Market Study as possibly contributing to the development of the Village Center zone, as development of the IPR zone could contribute to the critical mass of retail space and residential space necessary to make a village center work effectively. The permitted uses in the zone currently offer a wide variety of complementary development options. The site has current approvals for a light industrial and construction contractor complex.

e) Housing Diversity and Growth:

The results of Byram's consumer preferences survey confirm that residents recognize that apart from single-family homes, there are few other housing types available in the Township for buyers and renters in need of other options. It also showed that residents have an interest in small apartments, starter homes for young people, and housing for empty nesters. The community also expressed that there is not enough affordable housing for those who need it in Byram.

4. The Village Center: A Comprehensive and Innovative Core (Elements P, L, A, C & E)

The Village Center zone could be a game changer on the land development side that leads the way in Byram's economic development. The Township's ability to promote new business types is immense in a development of this magnitude. A walkable live/work/shopping environment is desired by Byram residents, but not currently available. Moreover, it's impractical to create a destination-shopping environment in which each store must be reached individually by car. This survey process has not only validated the desire for this zone to continue, but has revealed it as critical toward the long-term economic viability of the Community.

The VC will likely aid in attracting full-service restaurants, specialty grocery markets (e.g., ethnic/imported foods, fresh/organic/exotic produce, fresh seafood, butchered meats) furniture stores, specialty goods in the general merchandise category (i.e., smaller vendors that sell distinctive goods), outdoor recreation-focused sporting goods (that could service eco-tourism interests in the region), and bakeries, all of which were identified in the survey results as viable and publicly supported. Some of the prohibited uses on the commercial side could be evaluated in light of this plan as well.

The VC zone was extensively debated and revised more recently. The permitted uses conform to the intent of the zone and the types of uses vetted through public input and the Planning Board adoption process. While the Township is limited by its utility allocations, density and design are important considerations in economic viability of a project of this scope, especially with affordable housing being an inclusionary component. Accordingly, careful consideration must be given to housing typology, when juxtaposed against not only the desires of the market to fill gaps in housing availability currently lacking in Byram, but also the need to enhance and expand retail opportunity.



On display in many places Nationwide, buildings oriented to create atmosphere and interest are critical to creating that Center Byram lacks. Above: Bordentown City, NJ and French Quarter, New Orleans

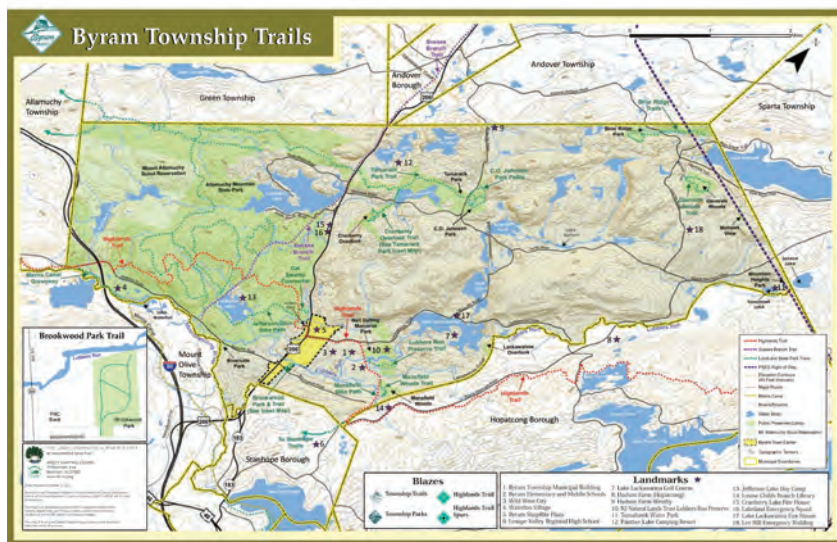
5. Open Space, Preserved Parklands and Trails (Elements A & E)

Byram is surrounded by public parks that attract visitors for biking, hiking, fishing, swimming, boating, kayaking, horseback riding, and more; in fact, 1.2 million tourists and residents visit State Parks in the Highlands each year, many of which are in or near Byram. Those that are in Byram need to be advertised and promoted as such.

The priority should be to develop an activity framework that will allow Byram Township to support current businesses while taking advantage of eco-related assets and market itself as an eco-tourism destination.

- A trail that is full of ups and downs – through a beautiful wild park – can be marketed as “stamina training” to runners. This could benefit a restaurant that is home to the local running club; a store on Main Street specializing in running shoes and gear; or Health store for “running fuel.”
- Rambling local trails that can be utilized to offer informational-guided tours on local ecology or bird watching could complement a niche store selling binoculars and trail equipment or deli shops offering boxed picnic lunches. Reviews by known authorities on outdoor topics in local or special interest publications could be marketed as celebrity-recommended tours. Coordinate activities such as Hike of the Month, featured Trail of Month, and other activities that can be promoted locally, regionally, and statewide tourism.
- A completely dark area in the middle of a local or state park could be used to target stargazers with evening gastro- and gazing-events, promoted by a store with specialty lenses, telescopes and night-vision equipment.

Some of these ideas may have a limited market, but it is one that is a captive market. People looking for specialized activities will come to Byram because it is the first and best-known place! Think of the lakes and lakefront in Byram, the active recreation, golf clubs, bicycle trails, and active theme parks. As we focus on the extensive array of such land uses, the possibilities seem endless. Every small idea becomes an initiative to enhance the resource, allowing it to add to the appeal of Byram as a place to be.



6. Eco-Tourism Infrastructure (Element L)

The Eco-tourism framework begins with the Township's and the Region's environmental assets. According to the definition and principles of eco-tourism, established by The International Eco-tourism Society (TIES) in 1990, eco-tourism is defined as "Responsible travel to natural areas that conserves the environment and improves the well-being of local people." It is crucial to consider the economic, social, and environmental impacts of tourism activities in order to ensure success. How these assets are utilized, accessed and connected to economic development is an important cog in the Township's economy. Whether hiking, biking, birding, boating, fishing or swimming, there are hundreds of acres of natural beauty to capitalize on in Byram Township.

The attractions, accommodations, services, and infrastructure that support a tourism destination are all integral components to its success. To solidify this framework, this Plan recommends:

- a) Reviewing and tailoring the Township's Open Space and Recreation Master Plan to meet the needs of eco-tourism objectives.
- b) Developing an initiative with a specific focus on marketing and promoting athletic events, cultural activities, and eco-tourism opportunities.
- c) Creating a program with context-sensitive transportation solutions identified in the Township's Master Plan to support bicycling and road running in concert with eco-tourism opportunities, to build on and support open space and recreational facilities.
- d) Working with Lake Associations, Byram Business Owners or similar groups and entertainment facilities to explore community-wide opportunities.



7. Building Capacity Through Local Pride: I live in Byram! (Elements P, L, A, C & E)

Consider Byram's residents – living, working, learning and participating in day-to-day activities. Working with the Community, start an interactive campaign. Find out what Byram means to people. Ask kids to create posters saying, "I like Byram because..." or collect photos of people enjoying kayaking or biking during "My weekend in Byram." These can be a great source of ideas for attractive promotional material. Instilling pride in a community always increases the capacity of volunteerism and support from the Business Community.

a) Coordination

Coordination can be difficult, since it takes time, patience, and collective thinking. The creation of new ideas – through a lens by which people from different groups view the world – should not be overlooked. The increased awareness of the values of different groups can lead to increased efficiencies in programming and budgeting. It can also lead to support from outside entities by furthering their understanding that what is good for the local economy can also be beneficial to the larger region.

- i. Coordinate the financial and technical resources and missions of the Township's EDAC; Open Space Committee; Environmental Commission; and Recreation Commission to work collectively for the economy of Byram.
- ii. Work with Federal and State entities – including Waterloo Village and Allamuchy State Park – to garner support for this Plan's recommendations and to build the Byram Brand
 - 1) Advertise and encourage residents to utilize Byram, NJ as their postal address where possible, regardless of zip code.
 - 2) Work with USDOT and NJDOT to get Byram added to highway signage;
 - Route 206 Exit on Interstate 80
 - Mileage to Byram on Route 206, Route 183, etc

b) Business retention programs

Any business retention program should be designed to drive more business to existing merchants, such as:

- i. Cooperative Business Community marketing programs by which retailers jointly market their business and one or more other businesses in Byram to their own customer base. For example, Hobby Town and Wild West City both target young families and probably keep databases of their customers; they could collaborate on a direct mail and/or e-mail campaign to their respective customer bases offering discounts or simply promoting both businesses to that entire audience, effectively increasing market share for both businesses;

- ii. Sweepstakes program offering desirable prizes to shoppers of the secondary trade area. To enter, shoppers must obtain entry forms from participating Byram merchants. Shoppers may enter as often as they like, but may only enter once per store. This compels them to visit multiple stores, driving up foot traffic. Entry forms would also ask that shoppers provide their e-mail addresses, which could become part of Byram Businesses' customer e-mail database for future e-marketing;
- iii. Internet support to make sure that all Byram merchants have an effective website for their business, with links to a primary Byram Business website that includes interactive features like a map/directory showing store locations by name and type. This could provide a single place to find such things as special offers currently available from Byram merchants each month. This should also include support to enable Byram merchants selling goods to do so whenever possible on their websites, expanding their potential markets. The Internet assistance should also include development of social media capability, using Facebook, Twitter, Instagram, Snapchat and other emerging internet applications;
- iv. Shopper loyalty programs designed to encourage existing shoppers to shop in Byram more frequently, and to spend more per visit. For example, a Shop Local program using "Byram Bucks" to promote local businesses.

c) Provide Educational Resources to the Business Community

- i. Collect and distribute pertinent market, demographic, and regulatory information
- ii. Regularly attend trade shows and events where opportunities within the Township are promoted
- iii. Conduct a retail leakage analysis to determine which goods and service are being purchased outside of the Township and share the findings with the Byram Business Owners or similar group
- iv. Understand and evaluate workforce needs and respond accordingly through technical and financial assistance provided locally, regionally or statewide.
- v. Schedule and conduct regular business visits with key Township officials to understand and continuously evaluate the business community's needs

d) Year-Round and Seasonal Events

Attracting visitors with events is a way to drum up business for the existing Business Community. A comprehensive calendar of events is a great place to start. By publicizing

events, the Community could market to specific groups of people, such as hiking, biking and other clubs. Direct links, ads, or mentions of business specials within the existing Business Community can also be included.

The Township and Business Community could also work to create public event spaces, allowing larger parcels and/or parking lot facilities to be used to create fairs and public markets. Event development could be designed to attract new outside visitors of various types (young families, seniors, singles, music lovers, bike race fans, hikers, birdwatchers, antique collectors, art lovers, etc.) to visit Byram at public locations convenient to the businesses of Byram, and to be encouraged to dine in Byram restaurants, and shop in Byram businesses through a variety of means, including sponsorships, discounts, and bounce-back coupons.

e) Creating the Environment

Create aesthetically pleasing landscapes through gateway treatments, way-finding, and branding.

8. Creating and Marketing the Byram Brand (Elements A, C & E)

Piggy-backing on Building Capacity Through Local Pride, in order for commerce to survive and thrive in Byram, outside visitors must be induced to shop and dine here. Attracting new business alone won't bring the shoppers; marketing must be utilized to accomplish this. Successful marketing depends on two critical components: messaging, and the ability to deliver it thoroughly and efficiently.

Local marketing needs must also consider growing the Township. Working with the Community to create a brand for Byram Township as a place to do business will be a tiered pursuit. Today, there is a need to promote and support the existing local market, but this Plan foresees a future for Byram that includes the much broader regional marketplace.

Accordingly, this Plan proposes the following:

- a) Set short- and long-range goals. Develop a budget for staff and/or consultants to begin and facilitate implementation. Find sponsors and contributions.
- b) Work toward branding Byram in a way that recognizes its place in today's market, while teeing up future promotional activities once the branding begins to gel. Capitalize on Byram's attractions to promote opportunities for existing businesses to attract other business. Such an effort will include;

- i. Evaluating and understanding the Byram’s image.
 - ii. Messaging – Create a slogan, a rallying call. Currently, Sussex County utilizes “People and Nature.” Byram, “Gateway to New Jersey Trails” or “Township of Lakes.” In order to facilitate such an effort, the Township (through its EDAC, Recreation Committee, Environmental Commission and Open Space Committee) should work to draw interest from naturalists, outdoor recreation enthusiasts, the State Tourism board, Sussex County Chamber of Commerce, etc.
- c) Targeted marketing campaigns should be launched for specific purposes, as follows:
 - i. Attract qualified mixed-use developers to design and build the Village Center project, and other mixed-use project opportunities that there may be along Route 206. Identify developers/investors that have successful experience developing similar projects in NJ, metro NY market, or the northeast region and build a database with contact information for them.
 - ii. Create marketing materials to promote the development sites that are available in Byram, and that emphasize the Township’s research and planning for mixed-use development. Those marketing materials should be mailed to each of the developer prospects with a letter from the Mayor offering a tour of Byram.
 - iii. Implement a campaign to proactively recruit new businesses into town. A list of business prospects in the recommended categories of retail that were determined through the JGSC Group Retail Market Study (see Appendices) should be compiled, and these prospects should be targeted for direct mail marketing materials (emphasizing the positive retail aspects of Byram), invitations to tour the town, and direct “warm” follow-up phone calls.
 - iv. Invite local commercial real estate brokers to a presentation to hear about Byram’s analysis and plan for revitalization, provide them with a list of retail prospects, and invite them to help recruit these prospects to Byram.
- d) The Township and Business Community should create an ongoing marketing program to market the Byram brand and its shopping/dining/recreational opportunities to consumers of the primary and secondary trade areas on a regular, sustained basis.
- e) A program of seasonal retail marketing should be developed through which the Business Community may separately stimulate consumer visits for local businesses by promoting shopping and dining opportunities in Byram that dovetail with annual shopping seasons (Super Bowl, Valentines, Presidents’ Day, St. Patrick’s Day, Easter/Passover, Memorial Day,

Mother's and Father's Days, Graduation, Fourth of July, Back to School, Halloween, Thanksgiving, and Holiday seasons). Marketing can include various media, but at a minimum e-mail blasts, and special promotions, offers, or product announcements that feature specific merchants in Byram.

- f) Finally, in view of the fact that a funding vehicle will be necessary to design and execute these marketing programs, the Plan once again recommends the formation, by ordinance, of a Special Improvement District (SID), if it were found feasible to do so. A SID would allow the business community to make annual marketing plans, fund and execute them.

9. Strategic Retail Recruitment (Elements L & A)

To create a more compelling retail mix that would spur additional shopping visits by existing shoppers – and help attract new visitors from the wider secondary trade area – the Township must utilize the combination of a marketing plan it will create with a list of business it wants to attract. Strategic development will provide new retail locations – suitable for retailers in sustainable categories – that fit the Township's infrastructure capacities. Targeted retail recruitment will help fill commercial spaces with more destination businesses, and take advantage of local eco-tourism. Once those businesses are in place, Byram can begin attracting visitors from the 10-mile radius.

- a) Generate pre-leasing interest in the Village Center zone's development that could be communicated to potential developers. Attempt to attract retail businesses that cater to eco-tourism audiences;
- b) Market Byram's businesses directly to the eco-tourism population, particularly through cooperative marketing with the public and with private attraction managers;
- c) Develop events designed to appeal directly to eco-tourists that would bring them to Byram's commercial center during peak times of their respective seasons.



IMPLEMENTATION PLAN

-- HOW ARE WE GOING TO DO IT? --

The D.O.M.E. Framework:

The implementation strategy for Byram’s Sustainable Economic Development (SED) Plan follows a systematic and logical path to understanding and ultimately achieving the goals and objectives we are proposing to the community. This chapter reviews the operational side of ensuring the success of the Implementation Matrix that follows. It should be clear that the outcomes desired from a plan do not happen just because it was adopted by a community and then put on the shelf; the plan must be worked on, refreshed and updated along the way as new data is accumulated and shared with all of the stakeholders to ensure everyone is working toward the common goal. It takes the entire community to come together and make it happen – especially to reshape and capture a dynamic market that changes and evolves fairly quickly. The DOME framework assists in identifying the members of the Community that will be necessary to achieve success while educating and coordinating with those that may be added down the road.

DOME is an acronym for the four elements of how the “PLACE” based plan will be implemented. It presents an idea of the operational side of the work to come. DOME is;

- D - Data & Demographics;
- O – Operations Management
- M – Measures & Metrics
- E – Engagement & Evaluation

Each activity or recommendation of the Plan will have several moving pieces to it. Having a structure in place ensures that the big picture does not become overwhelming, and the Plan becomes easier to implement. When the work is streamlined and shared, the PLACE vision will become reality.

DATA & DEMOGRAPHICS:

The demographics information is important to understand the critical mass of consumers that will be required to support the desired services and products. Numbers inform decisions; therefore it is important to keep up to speed with relevant, current, and projected data for deciding the scale and direction of implementation. These data sets should include the following:

Demographics:

- ☐ Population by age cohorts, education, employment location and commutes.
- ☐ Resident (living in Byram) or temporary (daytime working) populations
- ☐ Growth projections in terms of population (births and migration) and employment

Socio-Economic Indicators:

Socio-economic data informs the type of housing and shopping that would appeal to the community - or the target market - for development due diligence and for business development. This information should include, at a minimum:

- ☐ Income and educational attainment of market area residents
- ☐ Number of employers and jobs
- ☐ Number and type of industries (sectors)
- ☐ If the employment is seasonal, permanent or pilot/branch office of a larger employer
- ☐ Sector requirement for education and skills - agricultural sector will have very different needs from, for example, the pharmaceutical sector.

The data sets at the time this Plan was drafted were derived from current demographic and economic data from ESRI, an international data subscription service based in California that is widely respected and utilized by the retail industry. ESRI provides GIS-based data; that is, information that is expressly descriptive of a specific geographic area. We solicited data for Byram Township, as well as for the 3-mile, 5-mile, and 10-mile radii surrounding the Township. This data source would be helpful in subsequent updates and analysis.

Market Analysis:

The market area for purposes of economic development encompasses not only the area of Byram Township. As noted in the retail market study, a 10-mile radius would be considered a reasonable market for Byram's business and housing market. Such an analysis would also include both qualitative and quantitative information such as desirable housing types, preferred activities that could also generate income for local businesses, and shopping habits and disposable income (amount available for discretionary spending by a household). Demographic data changes year to year and is summarized every 10 years in the national census, Socio-economic indicators change as the market change. Markets fluctuate and follow cycles. The Basic market data presented in this Plan should be updated every 5 to 10 years to determine if the plan is having positive results or if the underlying assumptions are no longer relevant and the plan needs to be updated.

OPERATIONS MANAGEMENT

The operations part of the implementation, as the name suggests, is about the actual work - policy, people, infrastructure and process. Each of these should come from the stakeholder group most capable of handling the job as well as the most eligible - i.e. efficiency and effectiveness.

Policy:

Upon adoption, this Plan will guide the policies of the Township. The policies the Township will consider will be established on a number of fronts based on the expectations of this economic development plan and other pressures from within and outside of the Township. For example, the Township will have to make changes to zoning ordinances, enforcement, parks and recreation, and perhaps someday even community policing. The policies the Township chooses to focus on should also clearly coordinate with the terminology used in the plan and they should outline the rules for information sharing and standardizing the procedures for implementation.

As implementation of the Plan progresses, the Township's policies will need to be addressed in the budget process. Consideration should also be given to Capital Improvements, PILOT reinvestment, and the potential for a BID, SID, or TIF. Costs and benefits should be considered for distribution and reinvestment to ensure a cooperative spirit of progress. Discontent stakeholders - public and private - become unwilling to continue implementing the Plan.

People:

- Identify the implementers:
 - First, define the responsibilities and skills needed to complete each task. The human resources and the time they dedicate to implementing the Plan will impact how smoothly the process flows. The Implementation Matrix should be the baseline analysis for this task, to help identify the responsibilities and skills needed.
 - Second, identify what you already have. Is there a numbers genius who can work on the business budget or a writer who can create content for the website? Are they willing to work - as a volunteer or does the effort require a paid employee? For identified gaps in skills, implementation may require hiring outside consultants or creation of projects that can be handed off.
 - Finally, ensure that each task is being handled by the person most suited. For example, a third-party neutral planning consultant may be the most effective in negotiating between property owners and the planning/zoning department on land use issues while also being efficient due to knowledge and experience in land use planning. Similarly, a marketing consultant with a strong local network in retail would be better equipped to work with a business association to promote existing businesses and conduct outreach to potential investors.

- Identify the customers: It is also important to identify the "customers" of the SED Plan in order to tailor the policy and process more effectively. Customer fall into two major categories:
 - Internal consumers: People within the implementation process who provide goods/ services to each other. For example, information from the planning department about rules is a goods supplied to land developers to be used in due diligence.

- External consumers: People outside the implementation framework who are the target market. For instance, the landowner (internal/stakeholder) will take the potential land use building capacity to retailers (external consumer) for purchase/leasing.

Infrastructure:

The implementation of a SED Plan as varied as Byram's will require different tools for each proposed activity, and in varying proportions. These tools can be both physical and digital, and choosing the appropriate mix can enhance the impact of each activity. The infrastructure also costs money and should be adequately identified in quantity and with enough notice. One or more persons may also be made responsible for oversight of the infrastructure, as needed.

- Physical: Includes meeting or event space, an office (which may or may not be within the Township offices), office supplies, easels to display information, and even such amenities as coffee on meeting days!
- Digital: Website, social media, photos and documents, data on demographics and markets, software to process the information.
 - Content management should be coordinated between the various stakeholders for consistent messaging whether for flyers, etc or on social media. However, partnerships will be required based on the ownership of information.
 - Information: For confidential information, the Township attorney may suggest keeping the data secure and identifying ownership of the content/document. For open records information, it is important to have clear and accessible content for ease of use (and for lowering the cost of doing business in Byram - the Byram brand).
 - Communications and publicity material should be relevant and consistent with the marketing plan, and be customized for each section of the audience. It should be approved with adequate notice before handing off to the marketing/publicity person.

Process:

This is the final piece of operations and brings the policy, people and infrastructure together in a cohesive and logical manner. The process is made up of actions and timelines.

- Actions: The actions will include tasks for each entity involved and comes from Implementation Matrix. To start the process, the inputs, outputs, gaps, and hand-off points for each of the tasks should be identified. Some activities will have pre-established tasks and responsible stakeholders - e.g. proposed land use revisions. Some will need to be identified and allocated by consensus - e.g. setting up the website and social media content. Inputs will also come from varied sources and may be handed off to external agencies.

□ **Timeline:** The phasing of the plan, based on timing of implementation and impact desired, can be short-term, long-term or a hybrid of both. This plan identifies four different types of actions to be taken, as identified in the Implementation Matrix.

- **Foundation Activities** – These are activities that must be accomplished early in the plan implementation process to create a strong foundation to ensure the success of the remaining plan activities. These Foundation Activities should be accomplished in the first year of the plan and often establish or redefine the various plan participants.
- **Milestone Activities** – These are activities that mark an important milestone in the progress of the plan. These Milestone Activities should be accomplished throughout the length of the plan implementation process. Some are early achievements and others or long range projects.
- **Strategic Activities** – These are activities that occur throughout the plan and are individual actions or strategies that are intended to move the plan forward. These Strategic Activities are not necessarily inter-related and need not be done in a specific sequence. These represent the various strategies identified throughout the plan.
- **Ongoing Activities** – These are activities that are continuous and ongoing over the life of the plan. These Ongoing Activities occur regularly and are intended to function as background activities necessary to keep the plan moving forward.

MEASURES & METRICS

Measuring success is a good practice, both for understanding the direction of the plan and for defining what it means for each activity Byram undertakes. Two questions that should be ask are: 1) what outcome will define a successful implementation? and 2) how do we measure this outcome? For example, to increase housing diversity in Byram, the desired outcome may be to have a pre-determined mix of housing types in a given period (say next 2 years) and to ensure that any future development in the Township adds up to the required units for each type. The metric could also be based on the increase in the age cohorts that would require such housing types. If those numbers are achieved, the implementation can be called a success. Although more common in the private/ corporate sector, the SED Plan is, in a way, the development, packaging and marketing of the Byram brand.

The first undertaking should be to identify the appropriate metrics for each task, activity or recommendation. For example, if changes in the land use ordinance lead to more land uses filling up the previously vacant or underdeveloped properties, then the number of applications can be a metric. If variety is the goal, then mixed-use applications with the number of uses can be a metric.

It is important to reflect what is to be measured, and to determine whether that metric can be quantified.

The most basic measure of anything is a starting point. From the previous example, each property might currently be allowed one primary and one accessory use. But for retail properties, the current unit of measurement may be “retail” or “office” whereas the retail may actually be 4 or 5 different businesses.

The second measure is a benchmark - such as “Main Street should be 50% mixed use in next 4 years.” For businesses, a benchmark could be 10% annual growth in revenue - if marketing and other efforts increase revenue by 7% then things are moving in the right direction, but why are you falling short? The answer could be that not enough effort was made to reach more customers, or that 10% was not a realistic goal. The business could then evaluate its strategy and effort to maximize its return on investment. Such benchmarks are useful in understanding whether the ongoing efforts are yielding the desired results.

The standards and requirements of each recommendation will dictate which metrics will be most indicative of success and what the target measure should be. Periodic measurements, such as a quarterly or annual report, will ensure that the implementation process is making good use of available resources.. The measures will also be a guide to comparing the ideal vs. realistic targets during evaluation and alert implementers to any need for changes in strategy.

ENGAGEMENT & EVALUATION

Customers, clients, and stakeholders have a distinct set of needs and preferences, which, over time, will change. Whatever the latest trend was last quarter may no longer be the most desired. This is a reality when considering a subjective measure such as preferences. Market choices, economic environment and lifestyle changes can negatively impact a rigid implementation strategy. However, if the strategy is regularly evaluated and adjusted, then there are opportunities to add value. It is important to be aware of the quantitative and qualitative changes to be able to provide personalized service to the target audience, thus getting a better return for the Township, its residents, businesses and future stakeholders. The two most common ways to accomplish this are:

- Engagement: Interaction with the target audience is a great way to get quantitative feedback. These could be hands on sessions such as design charettes to create posters for a Byram art show or online questionnaires asking about how people enjoyed the latest pop-up market. Such information can provide ideas for tweaking the process, continuing or stopping an activity, etc. In addition to providing an open and informal place to voice opinions, such interaction is a great way to involve more people in building the Byram brand and to celebrate Byram. Public acknowledgement and praise of good work can be great motivators.
- Evaluation: The regular evaluation of strategy will help find value-added opportunities as Byram builds its development capacity and begins to take advantage of its desirability. For example, when there are thriving businesses and no vacant storefronts in the VB district, then the demand for any upcoming

commercial space in the VC will be high, and the community will be able to pick retailers that provide greatest return both in monetary and branding terms. But without information as to how many stores were vacant or how well VB businesses are doing, one cannot effectively market the VC space.

Evaluation is also applicable to the various components of the implementation plan. An audience group or a benchmark that is valid today may not be relevant 5 years from now when some of the targets are already achieved. A new lifestyle trend may make a recommendation invalid, or a new mode of communication will change marketing outreach. Given that such evaluation will depend on the quality and timeliness of information, it should be done with the bigger picture in mind and at regular intervals.



IMPLEMENTATION MATRIX

This Matrix is meant to guide activities necessary to Implement the plan. They are broken down into four categories; Foundational, Milestone, Strategic, and Ongoing Activities. The estimated time to completion is meant to provide some idea of how long each activity could take, not the anticipated time to complete when this plan is adopted. Some of the action items require completion before subsequent activities can realistically take place. In cases where these circumstances may not be so readily apparent, the notes section points this out. The Township's Planning Director along with the Township's Government Entity – its elected and appointed officials, commissions, committees and volunteers – will work to develop a project plan for implementation of the matrix. The project plan will identify: critical path; resources; dependencies; track time; identify budget; and monitor progress. As the plan is defined, owners of each action item will be identified, as well as individuals that are responsible for implementation and additional resources. Together, the Township's Planning Director and Township will focus its first thrust on prioritizing the Foundational Activities while beginning to assess how the Strategic Activities can catapult the effort forward once the foundation is solidified.

The Draft Matrix that follows is a guide, it is not a strict recipe as there are many paths to achieve success. As actions are taken, the Township may find other issues it needs to address as new opportunities are revealed. This Plan is not static, it will be a fluid effort. In order to align the Implementation Matrix with the Plan's Sustainable Economic Development Strategies chapter, we have a column in the matrix that identifies the strategy section in which the Action Items are discussed. Additionally, there are many partners and resources both known and unknown at this point in time. We have provided a list of some of them which is by no means meant to be exhaustive;

- | | |
|-----------------------------------|---------------------------------------|
| 1) The Township of Byram | 3) Clubs |
| a. The Governing Body | a. Recreation clubs |
| b. Administrative Staff | b. Hiking clubs |
| c. Various Departments | c. Bicycling clubs |
| d. Land Use Board | 4) Private enterprise |
| e. EDAC | a. Businesses and related organiza- |
| f. Open Space Committee | tions |
| g. Recreation Committee | b. Entertainment organizations |
| h. ARC | 5) Nongovernmental Organizations |
| 2) Intergovernmental | a. BBOA |
| a. County of Sussex | b. Chamber of Commerce |
| b. County of Morris | c. Service Providers (Kiwanis, Lions, |
| c. Newton, Stanhope, Mount Olive, | etc.) |
| etc. | d. Rotary |
| d. State of New Jersey | e. Etc. |
| e. NJDEP – State Parks | |
| f. NJDOT | |
| g. USDOT | |

Foundational Activities – Those items that will underlie a successful program and will serve as the basis for moving forward.							
<i>Action Item</i>	<i>Strategy Section</i>	<i>Owner</i>	<i>Implemented by</i>	<i>Additional Resources</i>	<i>Estimated Time to Complete</i>	<i>Status/Notes</i>	
Research hiring a Program Facilitator/liason	<i>1</i>	Governing Body	Township Manager	EDAC	3 months	Can be part-time to start.	
Develop a budget	<i>1</i>	Governing Body	Township Manager	EDAC	1 year	Based upon how a full or part time staff can deliver initial setup and facilitation of the program.	
Develop a source of revenue for the Program/fundraising	<i>1</i>	Governing Body	EDAC	Township	1 year	Work to develop alternate ways of generating funds to supplement the Township budget toward eventually becoming self-sustaining. Including a BBOA.	
Find sponsors and contributions for marketing	<i>8</i>	Planning Director	Program Facilitator	BBOA, EDAC	Ongoing	Once hiring is in place.	
Redefine/Re-organize the EDAC	<i>1</i>	Governing Body	Township Manager	Township	6 months		
Create and support a Byram Business Owners Association (BBOA)	<i>1</i>	EDAC	Program Facilitator	Township	1 year		
Develop marketing materials specific to the Village Center	<i>4</i>	Planning Director	Program Facilitator	EDAC, Township	1 year		
Research best practices in Eco-tourism	<i>6</i>	EDAC	Program Facilitator	EDAC, Township, BBOA	6 months		

Create a Calendar of Events	7	EDAC	Program Facilitator	BBOA, EDAC	6 months	
Evaluate and understand Byram's image	8	Planning Director	EDAC	BBOA, EDAC	1 year	
Set short- and long-range Marketing goals	8	EDAC	Program Facilitator	BBOA, EDAC, Township	6 months	
Create a slogan	8	EDAC	Program Facilitator	BBOA, EDAC	1 year	
Milestone Activities – An activity whose implementation is significant enough to potentially influence the course of how the Township conducts business and therefore begins to shape the market.						
Action Item	Strategy Section	Owner	Implemented by	Additional Resources	Estimated Time to Complete	Status/Notes
Review land development/ approval processes and simplify or streamline	2		Planning Board	EDAC	6 months	
Implement a small business program to support businesses that are independent, locally owned	1		Program Facilitator	BBOA, EDAC	1 year	
Municipal Building Assessment and Municipal Complex Masterplan	2		Township		1 year	
Revise LUO to simplify the permitted uses in the VB, NC and IPR zones	3		Planning Board	Township	1 year	
Revise LUO to specify the conditional and prohibited uses in the VB, NC and IPR zones	3		Planning Board	Township	1 year	
Review NC zone along the northern Route 206 corridor	3		Planning Board	Township	1 year	

Begin Cooperative Business Community marketing programs	7		Program Facilitator	BBOA, EDAC	1 year	
Identify developers/investors that have successful experience developing Town Centers and contact them	4		Program Facilitator	Township	2 year	
Attract qualified mixed-use developers to design and build the Village Center	4		Program Facilitator	Township, EDAC	2 years	
Generate pre-leasing interest in the Village Center development that could be communicated to potential developers.	9		Program Facilitator	Township BBOA, EDAC	2 years	
Develop a budget for staff and/or consultants to begin and facilitate implementation of marketing	1		Program Facilitator	Township	1 year	
Create Public Event spaces and Public Events	7		Program Facilitator	BBOA, EDAC	Ongoing	
Implement a campaign to proactively recruit new businesses	8		Program Facilitator	BBOA, EDAC	Ongoing	
Strategic Actions – Those actions whose implementation is meant to have impact on other short or longer-term aspects of sustained Implementation.						
Action Item	Strategy Section	Owner	Implemented by	Additional Resources	Estimated Time to Complete	Status/Notes

Provide public education documents about the land development and review process	2		Planning Board	EDAC	1 year	
Develop custom checklists and handouts	2		Planning Board	Township	2 years	
Review policies such as density bonuses, enhanced conditional uses, revenue allocation districts, etc.	3		Township	Planning Board, EDAC	6 months	
Research creating a SID	1		Township		6 months	
Research BIDs and TIF.	1		Township		6 months	
Research and Implement an incentive program to avoid long-term vacancies	1		Program Facilitator	BBOA, EDAC	1 year	
Research incentives to promote infill and redevelopment	1		Program Facilitator	Township, EDAC	1 year	
Develop Eco-related marketing materials/ business partnerships	5		Program Facilitator	BBOA, EDAC	1 year	
Review Township's Open Space and Recreation Master Plan to include eco-tourism objectives	5		Open Space Committee	Planning Board, EDAC	2 years	
Transportation solutions to support bicycling and road running	6		Open Space Committee	Planning Board, EDAC	2 years	

Start an interactive campaign to find out what Byram means to people	7		Program Facilitator	BBOA, EDAC	1 year	
Work with Federal and State entities to build the Byram Brand	7		Township	BBOA, EDAC	1 year	
Advertise and encourage residents to utilize Byram as their postal address	7		Program Facilitator	BBOA, EDAC	1 year	
Work with USDOT and NJDOT to get Byram placed on Signs	7		Township	BBOA, EDAC	2 years	
Develop a Customer Sweepstakes program	7		Program Facilitator	BBOA, EDAC	1 year	
Develop Shopper loyalty programs	7		Program Facilitator	BBOA, EDAC	2 year	
Create aesthetically pleasing gateway treatments, way-finding, and branding	7		Township	BBOA, EDAC	2 years	
Create marketing materials to promote the development sites that are available in Byram	8		Program Facilitator	BBOA, EDAC	2 years	
Provide local commercial real estate brokers a copy of retail prospects and invite them to help recruit	8		Program Facilitator	BBOA, EDAC	1 year	
Create an ongoing marketing program to consumers of the primary and secondary trade areas	8		Program Facilitator	BBOA, EDAC	1 year	

Develop a program of seasonal retail marketing that dovetails with annual shopping seasons	8		Program Facilitator	BBOA, EDAC	2 years	
Attempt to attract retail businesses that cater to eco-tourism audiences	9		Program Facilitator	BBOA, EDAC	1 year	
Market Byram's businesses directly to the eco-tourism population	9		Program Facilitator	BBOA, EDAC	1 year	
Develop events designed to appeal directly to eco-tourists	9		Program Facilitator	BBOA, EDAC	1 year	
Ongoing Activities – Those activities that require monitoring and assessment in order to evaluate program success.						
Action Item	Strategy Section	Owner	Implemented by	Additional Resources	Estimated Time to Complete	Status/Notes
Collect and distribute pertinent market, demographic, and regulatory information	1		Program Facilitator	BBOA, EDAC	Ongoing	
Schedule business visits with business owners, BBOA, Township officials and Chamber	1		Program Facilitator	BBOA, EDAC	Ongoing	
Coordinate resources EDAC; Open Space Committee; Environmental Commission; and Recreation Commission	7		Program Facilitator	BBOA, EDAC, OSC, EC, RC, Etc.	Ongoing	

Property maintenance and zoning code enforcement	2		Township		Ongoing	
Market and promote athletic events, cultural and ecotourism activities	7		Program Facilitator	BBOA, EDAC	Ongoing	
Explore community-wide promotional opportunities	8		Program Facilitator	BBOA, EDAC	Ongoing	
Provide social media and internet support	7		Program Facilitator	BBOA, EDAC	Ongoing	
Collect and distribute pertinent market, demographic, and regulatory information	7		Program Facilitator	BBOA, EDAC	Ongoing	
Regularly attend trade shows and events where opportunities within the Township are promoted	7		Program Facilitator	BBOA, EDAC	Ongoing	
Conduct and distribute a retail leakage analysis	7		Program Facilitator	BBOA, EDAC	Ongoing	
Evaluate workforce needs and respond accordingly through technical and financial assistance	7		Program Facilitator	BBOA, EDAC	Ongoing	
Schedule and conduct regular business visits with key Township officials	1		Program Facilitator	BBOA, EDAC	Ongoing	

APPENDICIES

-- THE DATA, RESEARCH, & INPUT --

Public Outreach Findings

Public outreach is a critical component of the planning process. This Sustainable Economic Development Plan utilized the public process to not only gauge how the Byram community feels about itself, but also to begin to understand why and how the market affects the Township through real data and public perceptions. Detailed below is a synopsis of the input we received based on a variety of constituents we engaged from the start of the project. Our process included;

- ☐ SWOT Analysis (Strength, Weakness, Opportunities & Threats)
- ☐ Open Public Meetings
- ☐ Stakeholder Interviews
- ☐ Economic Survey

SWOT Analysis (Strength, Weakness, Opportunities & Threats)

This summary contains both real AND perceived feelings regarding the Byram community. Perception is often viewed as nine tenths of reality. The key to successful analysis of this information is understanding that while the Plan is trying to create a game plan for economic growth in Byram Township, perceptions regarding how people feel about it is as important as fact. Creating a strong argument as to why do business in Byram Township needs to be ground in addressing perception and building assets. This is accomplished through openly hearing how the people and businesses in Byram feel about the issues while then taking known best practices and real market data to shape the direction the Township is best suited taking. This is not personal, its business.

Strengths – (Those aspects of the Byram community that make it an attractive place to live, work, and/or play)

- ☐ Great Highway access to the region at large (Rt 206, I-80, etc)
- ☐ Natural Beauty and Resources
 - Lakes, Parks
 - Active and Passive recreation
 - Rock climbing; hiking; campgrounds; waterpark
- ☐ Schools with enrollment capacity
 - Attractive to families
 - Good schools keep real estate stable
- ☐ Quality governmental services
 - Good value (i.e. Emergency services)
- ☐ Exurban/Rural character – wholesome, good old fashion neighborhoods
- ☐ Proximity to regional rail lines (Netcong and Dover Stations)

Weaknesses – (Those aspects of the Byram community that detract from its ability to reach its full potential)

- ☐ Utilities (Sewer and water capacities)
- ☐ Large land area in relationship to density and market accessibility.
- ☐ Taxes (New Jersey)
- ☐ No communal commercial areas (Village Center)
 - Reliance on the auto and access to other modes of transportation (ie. Transit, and bicycle pedestrian amenities)
- ☐ Interconnectivity through town and local access
- ☐ High amount of preserved land versus the ability to expand the ratable tax base
- ☐ Viability of commercial development

- Related vacancies
- Upkeep and business practices (maintenance and hours of operation)
- Relevancy of older businesses / properties
- Communications and Collaboration
 - Marketing and advertising
 - Businesses feel isolated

Opportunities – (Taking into account both the strengths and weaknesses how can the Byram community enhance its positive traits while minimizing its negative traits or underutilized assets)

- Making good schools GREAT
 - Be more progressive (ie 21st Century technology)
 - Hands on learning versus testing focus (teaching to the test)
 - Lenape Regional HS needs special focus
 - Build on the value of real estate in relation to quality of schools
 - Build on the value of elementary and middle schools to boost High School
- Reshape perception with Relators marketing (or redlining) Byram
- Enhance business collaboration (ie. Marketing)
- Review incentives to do business in Byram (Local Redevelopment and Housing Law, Special Improvement Districts, etc)
- Work with property owners/businesses to make them more relevant
- Provide technical and financial assistance to businesses
- Focus infrastructure capacities
- Develop welcome packet / marketing brochure
- Strengthen the Town's image (including Township Hall)
- Work to alleviate restrictions and review development process and protocol
- Develop the Hub where transit becomes a viable option
- Highlands (both in preservation efforts and development of VC growth)
- Utilize affordable housing regulations to the town's advantage
- Take advantage of the live/work trends

Threats – (Those issues that could potentially hinder the Byram community's ability to achieve its desired vision)

- Trenton (State Government)
- Highlands Council
- Staff and budgetary resources available to provide economic development guidance
- The process - plans and approvals
 - Municipal Land Use Law
 - Outside agencies (utilities, DEP, DOT etc)
- Road network and inability to make local connections
- Housing
 - Lack of senior housing – age in place
 - Rentals and starter homes
 - Affordable Housing (Lack of AND State Obligations)

Public Meetings

Several public meetings¹ were conducted to review research results and obtain additional feedback while being able to be conversant about both real and perceived issues Byram should address in this plan. The basic summary of the input we received during the course of these meetings revealed basic interest in addressing, and potentially implementing, the following considerations;

- 1) Improve the identity of the Community
 - a. Redevelop Town Hall
 - b. Continue to try working with US Postal Service
 - c. Develop Sales/marketing brochure
 - d. Evaluate and understand “image” issues
- 2) Strengthen Public Services
 - a. Attract health services and health related programs
 - b. Township Services and processes
- 3) Strengthen Byram’s attractiveness
 - a. Create Ecotourism program
 - b. Be proactive in code/zoning enforcement
- 4) Make Byram and viable and attractive place to do business
 - a. Proactively address vacancy issues
 - b. Review permitted versus prohibited uses (Zoning vs Context)
 - c. Evaluate and understand business/investor to government relationships, services and process
- 5) Educate the market
 - a. Address both real and perceived views
 - b. Assist the business community in marketing, advertising, and practice.
 - c. Convene meeting with the real estate community
 - d. Work to promote a better understanding of the development process, Vision, and including the Village Center.

Economic Surveys and Stakeholder Interviews

Appended to this Plan is a full Market Analysis Report provided by the JGSC Group, known experts in the field of economic analysis and market research as it pertains to municipal planning in the area vision, goals and objectives setting and economic development plan implementation. Their work interfaced directly with several components of the community at-large; merchants, key community leaders and stakeholders, and consumers – the public randomly sampled. This report was finalized in December of 2015.

¹ August 14, 2015; September 10, 2015; October 25, 2015; February 10, 2016

Merchants-

Byram merchants were addressed at random across the community. Most would not consent to interviews, but fifteen² did talk with us. Our intent was to gain a cross-section of opinions from individuals that own their retail space, those who rent it, those that sell goods, those that provide services, those that are restaurateurs, those that have been in Byram for many years, and those that are newcomers. Their issues are fully summarized in a document that is appended to this report, but in short we found;

- Some merchants have seen improved economic performance this year over last, they are few—most have experienced lower revenues 2015 over 2014. All merchants interviewed would like to see efforts mounted to increase business; many favor new development to add to the number of businesses in Byram.
- One key finding was that most merchants do little marketing of their own, including websites and social media. They need help to learn how to gather email addresses for their customers, and to create websites. There are significant opportunities for cooperative marketing.

Stakeholders-

Nearly two-dozen individuals³ that the Township identified as stakeholders: people with a vested interest in the future of commerce in Byram Township. From the stakeholders, we learned that:

- There is no center of Byram, but unlinked and isolated neighborhoods;
- There is a sense that local government is trying to be business-friendly, but that a series of measures (prohibition of B.Y.O.B. in restaurants without liquor licenses; restrictive sign ordinance; restrictions against privately-sponsored events in the shopping center parking lot; prohibition of new gas stations; support of anti-commercial development residents of Brookdale Road) suggest instead that there may be some further improvements necessary;
- There are conflicting visions for the future of commerce in Byram, with some stakeholders favoring development of a walkable village center with small boutique stores, others favoring attraction of only large national retailers, and still others opposed to any development whatsoever in the Township;
- There is not enough inter-connectivity among merchants, and with community agencies (Allamuchy State Parks, Waterloo Village) with whom common marketing programs could yield more business for Byram merchants.
- There are too few events in Byram to bring residents together, and there is no common location close to Byram merchants where events could be held in a way that benefits business.

² We interviewed representatives of the Byram Diner; Pro Plaza 206/Khanna Financial Advisors; Frogmore; Realty Executives; Trout & Troll/Salt; ShopRite; Halulu Restaurant; Byram Jewelers; Nutrition Zone; Hafner Laboratories, Inc.; Cones By Design/Re-Designs Thrift Shoppe; Nissan; and GNC.

³ Katie Baron, Brad Boyle, Steve Ellis, Clerk Doris Flynn, Mike & Penny Holenstine, Dan Kreuder, Rich Kuncken, Andrew McElroy, Margaret McGarrity, Dan & Barbara McLaughlin, Jeanne Moran, Mayor James Oscovitch, Andrea Proctor, Mario Provenzano, Dave Romano, Luis Rodriguez, Dan Ruth, Angel Sabatini, George Shivas, and Mike Tufaro.

Community At-large-

We also spoke with the community at large, through an online survey in which we invited people to respond to three-dozen questions about Byram. Many were multiple choice, several applied Likert scales for degrees of interest, and still others allowed open, unprompted responses for which people could type-in their answers. In one month, we received 1,415 responses: a remarkable sampling! With such a high response, the margin of error is extremely low (2.7%)—meaning that when we apply the answers of this representative group to the 8,240 residents of Byram, it would be an accurate reflection of their viewpoints within a two-and-a-half point swing in either direction. This means that the data is highly reliable. Retailers and developers that use survey data normally require a 5% margin of error for accuracy; your data is much more reliable. A copy of the survey questions, and a summary of the survey results, are appended to this report. Here are a few of the salient points from those results;

Who took the survey

- ☐ Of the 1,415 completed surveys, 86% were from residents of Byram Township.
- ☐ 71% of residents have lived in their current zip code for 10 years or more.
- ☐ Among all respondents, 61% are female and 39% are male.
- ☐ The typical household has 2.4 adults and 1.2 children.
- ☐ The average respondent is 47.3 years old and 57% are age 45 or older.
- ☐ The average household income of respondents is \$129,805 and 63% of all respondent households have income greater than \$100,000 annually.

What's important to accomplish

- ☐ Among all respondents, 74% say it's "very important" to retain existing businesses.
- ☐ 65% of all respondents say it's "very important" to attract new dining places, while 62% want more new retail businesses.
- ☐ 54% of all respondents say it's "very important" to actively revitalize storefronts and building facades.
- ☐ Half of all respondents said that it is "very important" to attract more eco-tourism business.

Overview – The survey was conducted online from September 7, through October 12, 2015. A total of 1,415 responses were received, resulting in a 2.7% margin of error. The survey was promoted to residents and visitors using roadside signs, email and social media messages, press releases, and flyers distributed to schools and businesses.

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Dining and shopping preferences

- ☐ On average, respondents dine out 7.9 times a month and spend \$180 per person in a month.
- ☐ Among residents, Byram captures just 37% of dining visits and 31% of dining spending.
- ☐ More than one-third (36%) of all respondents indicated that they never shop in Byram. Nearly one-half (48%) of non-residents indicated that they never shop in Byram. This reveals a huge market opportunity within Byram's current trade area.

Preferred shopping centers

- ☐ The shopping centers visited most often by Byram residents are ITC Crossing, Rockaway Mall, Roxbury Mall, and Ledgewood Mall.
- ☐ The shopping centers shopped least frequently by Byram Residents include Sutton Plaza shopping center, Hackettstown Mall, and Village Green shopping center.

Main reasons for not visiting more often

- ☐ 72% of all respondents say they don't visit more often because of the limited offering of stores / shops.

Would shop and/or dine more often if Byram offered more...

- ☐ 70% of all respondents say they would shop and/or dine in Byram if it offered more full-service restaurants.
- ☐ 68% want a fresh produce market.

Features of commerce rated "good" along route 206, in order:

- ☐ Among all respondents, the most (55%) said "safety during the evening" is good.

Features of commerce rated "poor" along route 206, in order:

- ☐ Nearly one-third of all respondents (30%) indicated that "overall appearance" is poor; however, significantly fewer non-residents (19%) feel this way than do residents (32%).

Types of commercial development rated "very appealing" for the Village Center, in order:

- ☐ The choice rated "very appealing" to nearly two-thirds (63%) of all respondents was a "walkable village with distinctive shops / restaurants". This was true of residents (63%)

and non-residents (62%) alike. This was the dominant preference of a strong majority of the group.

Types of commercial development rated “not appealing” for the Village Center, in order:

- The results indicate strong support for development of the Village Center zone, and a preference for destination retail (“distinctive shops and restaurants”) rather than convenience retail (“stores to serve everyday needs”). Moreover, the respondents clearly would like to see this commercial development in a traditional neighborhood development format (“walkable village”).

Number that agree with statements about types of housing, ranked in order:

- Among all respondents, the largest amount (61%) agree there is “adequate move-up housing” (single-family homes larger than start-up homes). However, only 41% of non-residents agree that this is true.

Number that disagree with statements about types of housing, ranked in order:

- Nearly two-thirds (63%) of all respondents disagree with the statement that Byram provides adequate housing for empty nesters. Among residents, the number rises to 65% who disagree, while 48% of non-residents disagree with the statement. This is a clear showing that a strong majority of residents feel that there are not enough housing options for empty nesters in Byram. By their estimation, this is least-adequately served housing category in Byram.

Interest in types of housing:

- 30% of all respondents expressed high or moderate interest in townhouses for purchase.

PLANNING AND LAND USE ANALYSIS

DEMOGRAPHIC CHARACTERISTICS

A detailed review of demographic data for Byram Township and the Market Area are included in the Market Profiles appended to the Market Study. The information below summarizes some of that data, compared it to Sussex County and the State of New Jersey and highlights some relevant information. For a complete breakdown, please refer to the appendices.

POPULATION

The 2010 population of Byram Township was 8,350, which was an increase of 96 people from the 2000 population. The population trends experienced in Byram Township, Sussex County, and the State of New Jersey from 1930 through 2010 are shown below. After years of population increase, associated with summer visitors becoming full-time residents, the Township's population growth has slowed down to 1.16% in 2010. The State of New Jersey has seen steady growth since the 1930's, with large population swells occurring during the sixties and seventies. Sussex County and Township of Byram had large increases through the 1970s and 1980s.

The 2015 population of Byram Township is projected to have declined to 8,240 and is projected to decline further by 2020 to 8,169. This represents a 0.17% decline over the 5-year period ending in 2020. This population decline, which began as a decline in the growth rate in the 1980's has transformed into a true decline in population and represents a challenge to local merchants.

Populations Trends, 1930 to 2000 – Municipality, County, and State

	Byram Township			Sussex County			New Jersey	
		Change			Change			Change
Year	Population	Number	Percent	Population	Number	Percent	Population	Number
1930	245	-	-	27,830	-	-	4,041,334	-
1940	373	128	34.30%	29,632	1,802	6.5%	4,160,165	118,831
1950	761	388	51.00%	34,423	4,791	16.2%	4,835,329	675,164
1960	1,616	855	52.90%	49,255	14,832	43.1%	6,066,782	1,231,453
1970	4,592	2,976	64.80%	77,528	28,273	57.4%	7,171,112	1,104,330
1980	7,502	2,910	38.80%	116,119	38,591	49.8%	7,365,011	463,899
1990	8,048	546	6.80%	130,943	14,824	12.8%	7,730,188	365,177
2000	8,254	206	2.50%	144,166	13,223	10.1%	8,414,350	684,162
2010	8,350	96	1.16%	149,265	5,099	3.54%	8,791,894	377,544

Data Source: U.S. Census Bureau, 2010 Census

POPULATION COMPOSITION BY AGE

The largest increases in the Township from 2000 to 2010 occurred in the 55 to 65 and 65 and over age cohorts, which experienced increases of 53.2% and 68.3%, respectively. There were significant declines in the 25 to 34 (-33.7%) and under 5 years (-29%) age groups.

The chart below illustrates three separate challenges that Byram Township must face. The first is the decline of the under 15 year old cohort, which can represent the bulk of family spending on

clothing, food and entertainment. The second is the decline in the 25 to 45 year old cohort, which represents a large portion of wage earning adulthood and a significant portion of the population with disposable income. The final challenge is the significant increase the 55 and over cohort in which earning begins to decline and many people shift into a fixed income lifestyle. While 55 to 65 can represent the peak earnings potential of individuals, it is the rise in 65 and over that represents the increase in individuals entering retirement and relying on retirement savings and other fixed income sources.

Population by Age 1990 and 2000, Byram Township

Population	2000		2010		Change, 2000 to 2010	
	Number	Percent	Number	Percent	Number	Percent
Under 5	644	7.8%	457	5.5%	-187	-29.0%
5 to 14	1,344	16.3%	1275	15.3%	-69	-5.1%
15 to 24	867	10.5%	1008	12.1%	141	16.3%
25 to 34	1,060	12.8%	703	8.4%	-357	-33.7%
35 to 44	1,614	19.6%	1324	15.9%	-290	-18.0%
45 to 54	1,447	17.5%	1550	18.6%	103	7.1%
55 to 64	777	9.4%	1190	14.3%	413	53.2%
65 and over	501	6.1%	843	10.1%	342	68.3%
Total	8,254	100	8350	100.0%	96	1.2%

Data Source: U.S. Census Bureau, 2010 Census

Population by Age, 1990 and 2000, Sussex County

Population	2000		2010		Change, 2000 to 2010	
	Number	Percent	Number	Percent	Number	Percent
Under 5	9,815	6.8	7,963	5.3%	-1,852	-18.9%
5 to 14	23,876	16.6	20,571	13.8%	-3,305	-13.8%
15 to 24	15,517	10.7	18,528	12.4%	3,011	19.4%
25 to 34	17,501	12.1	14,178	9.5%	-3,323	-19.0%
35 to 44	27,881	19.3	21,480	14.4%	-6,401	-23.0%
45 to 54	23,384	16.2	27,845	18.7%	4,461	19.1%
55 to 64	13,040	9.0	20,850	14.0%	7,810	59.9%
65 and over	13,152	9.1	17,850	12.0%	4,698	35.7%
Total	144,166	100	149,265	100.0%	5,099	3.5%

Data Source: U.S. Census Bureau, 2010 Census

The County saw significant increases in the 55 to 64 (59.9%) and 65 and over (35.7%) age cohorts as well and a significant decrease in the 35 to 44 years (-23%) age cohort. The median age of the population in Byram Township in 2010 was 41.1 years and that in Sussex County was 41.8 years. The median age of the population in Byram Township in 2015 is 42.6 and for 2020 is projected to be 43.3, another indication of an aging population.

HOUSEHOLDS

A household is defined as one or more persons, whether related or not, living together in a dwelling unit. In 2010, there were a total of 2,926 households in Byram Township. The average number of persons per household for the Township in 2010 was 2.85, slightly higher than the County's average of 2.69. Both the Township and the County had the greatest number of two-person households (33.4% and 32.5% respectively).

The number of households in 2015 in Byram Township is projected to have declined to 2,901 and is projected to decline further by 2020 to 2,889. This represents a 0.12% decline over the 5-year period ending in 2020.

Household Size- Occupied Housing Units- Byram Township and Sussex County

	Byram Township		Sussex County	
	Number	Percent	Number	Percent
1-person household	435	14.9%	11,482	21.0%
2-person household	976	33.4%	17,807	32.5%
3-person household	582	19.9%	10,100	18.4%
4-person household	588	20.1%	9,412	17.2%
5-person household	254	8.7%	4,108	7.5%
6-person household	65	2.2%	1,290	2.4%
7-or-more-person household	26	0.9%	553	1.0%
Total number of households	2,926		54,752	
Average Household Size	2.85		2.69	

Data Source: U.S. Census Bureau, 2010 Census

Family households are defined as two or more persons, living in the same household, related by blood, marriage or adoption. The largest number of households in the Township was two or more person family-households, comprising 80.7%. In 2010 there were 2,361 family households and the average family size for the Township was 3.19 persons. Only 14.9% of households were one-person households of which 6.9% were 1- person female households and 7.9% were 1-person male households. The number of family households in 2015 in Byram Township is projected to have declined to 2,349 with an average family size of 3.17 and that number is projected to decline further by 2020 to 2,336 with an average family size of 3.16. This represents a 0.11% decline over the 5-year period ending in 2020.

The 2010 Census also included the sub-groups of nontraditional households (Other family) and of Non-family households. Non-family households are defined as households that consist of a householder living alone or where the householder shares the home exclusively with people whom he/she is not related. These households only comprised 19.3% of the Township while Other Family households were 11.3%.

Household Size and Type - Byram Township, 2010

	Number	Percent
Total Households	2,926	100.0%
1-person household:	435	14.9%
Male householder	232	7.9%
Female householder	203	6.9%
Family households:	2,361	80.7%
Married-couple family:	2,029	69.3%
With own children under 18 years	943	32.2%
No own children under 18 years	1,086	37.1%
Other family:	332	11.3%
Male householder, no wife present:	99	3.4%
With own children under 18 years	44	1.5%
No own children under 18 years	55	1.9%
Female householder, no husband present:	233	8.0%
With own children under 18 years	108	3.7%
No own children under 18 years	125	4.3%
Nonfamily households:	565	19.3%
Male householder	232	7.9%
Female householder	203	6.9%
Average Family Size	3.19	

Data Source: U.S. Census Bureau, 2010 Census

INCOME

As measured in 2013, Byram Township had a higher median income than the County and the State. The median household income in Byram Township was \$103,906, approximately \$16,000 more than the County and \$31,000 more than the State's median income. Over 80% of the households within the Township had a household income larger than \$50,000; more than 50% of households had incomes greater than \$100,000.

The median household income in Byram in 2015 is projected to have increased to \$108,961 and is projected to increase further by 2020 to \$128,180. This represents a 17% increase over the 5-year period ending in 2020.

Per Capita and Median Household Income 2013

	Per Capita (\$)	Median Household (\$)
Byram Township	\$41,292	\$103,906
Sussex County	\$37,949	\$87,335
New Jersey	\$36,027	\$71,629

Data Source: U.S. Census Bureau, 2009-2013 5-Year American Community Survey

Households Income In 2013

	Byram Township		Sussex County	
	Number	Percent	Number	Percent
Total households	2,909		54,746	
Less than \$10,000	21	0.7%	1,419	2.6%
\$10,000 to \$14,999	44	1.5%	1,447	2.6%
\$15,000 to \$24,999	100	3.4%	3,069	5.6%
\$25,000 to \$34,999	136	4.7%	3,425	6.3%
\$35,000 to \$49,999	273	9.4%	5,042	9.2%
\$50,000 to \$74,999	442	15.2%	8,845	16.2%
\$75,000 to \$99,999	357	12.3%	8,716	15.9%
\$100,000 to \$149,999	749	25.7%	12,708	23.2%
\$150,000 or more	787	27.1%	10,075	18.4%
Median household income (\$)	\$103,906		\$87,335	

Data Source: U.S. Census Bureau, 2009-2013 5-Year American Community Survey

EMPLOYMENT TRENDS

The following tables detail changes in employment from 2000 to 2014 for Byram Township, Sussex County, and New Jersey. The number of those who are employed has increased steadily between 2000 and 2009 as the labor force has increased overall. However, the labor force has also steadily decreased between 2010 and 2014. The Byram Township unemployment rate peaked at 9% in 2009 during the Recession and then again in 2012-2013, yet remaining below the Sussex county and New Jersey unemployment rates. Increasing and decreasing trends were seen in both the County and the State.

Unemployment rarely fully explains employment trends because the unemployment rate often undercounts the number of people without work. Usually, there are two factors that make unemployment rates inaccurate. The first factor is underemployed workers, those who take jobs simply to earn money but are not employed at a level commensurate with their skills. Secondly, as workers remain unemployed, they may stop looking, become discouraged with the job market, and stop being counted in either the total labor force or the officially unemployed. Finally, the recent Recession also caused loss of employment and affects the employment/unemployment numbers from 2009 onwards as seen in the table below.

Consequently, considering the three factors mentioned above, one must also look at changes in the total labor force and current market dynamics as a whole to fully understand the employment dynamics in Byram Township. Therefore, while the 9.0% of 2009 and 8.3% of 2012 unemployment rates show a dramatic increase compared to the unemployment rate of around 4 to 4.6 % of the preceding years, these numbers continue to be lower than Sussex county and the State for the same time period. Discouraged workers and reduced employment opportunities due to the Recession may explain the reduction in the total labor force for the period since 2009.

Employment and Labor Force, 2000-2014, Byram Township

	Labor Force			Unemployment Rate
2000	4,820	4,679	141	2.9
2001	4,852	4,678	174	3.6
2002	4,943	4,703	240	4.9
2003	4,999	4,744	255	5.1
2004	4,997	4,785	212	4.2
2005	5,088	4,868	220	4.3
2006	5,159	4,923	236	4.6
2007	5,160	4,944	216	4.2
2008	5,230	4,958	272	5.2
2009	5,269	4,793	476	9.0
2010	4,829	4,546	283	5.9
2011	4,768	4,470	298	6.3
2012	4,657	4,269	388	8.3
2013	4,528	4,186	342	7.6
2014	4,520	4,242	278	6.2

Data Source: Total Labor Force, Employed, Unemployed and Unemployment Rate Estimates 2000-2014, NJ Department of Labor and Workforce Development

Employment and Labor Force, 2000-2014, Sussex County

	Labor Force			Unemployment Rate
2000	79,409	77,055	2,354	3.0
2001	79,952	77,042	2,910	3.6
2002	81,456	77,459	3,997	4.9
2003	82,395	78,133	4,262	5.2
2004	82,333	78,796	3,537	4.3

	Labor Force			Unemployment Rate
2005	82,976	79,727	3,249	3.9
2006	84,041	80,543	3,498	4.2
2007	84,106	80,801	3,305	3.9
2008	85,205	81,001	4,204	4.9
2009	85,607	78,265	7,342	8.6
2010	82,352	74,595	7,757	9.4
2011	81,875	74,346	7,529	9.2
2012	81,319	74,052	7,267	8.9
2013	78,962	72,764	6,198	7.8
2014	78,651	73,737	4,914	6.2

Data Source: Total Labor Force, Employed, Unemployed and Unemployment Rate Estimates 2000-2014, NJ Department of Labor and Workforce Development

Employment and Labor Force, 2000-2014, New Jersey

	Labor Force			Unemployment Rate
2000	4,282,100	4,123,700	158,400	3.7
2001	4,288,800	4,106,200	182,600	4.3
2002	4,346,200	4,095,200	251,100	5.8
2003	4,347,200	4,093,700	253,500	5.8
2004	4,349,200	4,138,800	210,300	4.8
2005	4,391,600	4,194,900	196,700	4.5
2006	4,445,900	4,236,500	209,400	4.7
2007	4,441,800	4,251,800	190,000	4.3
2008	4,504,400	4,264,000	240,500	5.3
2009	4,550,600	4,138,600	412,100	9.1
2010	4,555,300	4,121,500	433,900	9.5
2011	4,565,700	4,140,500	425,300	9.3
2012	4,588,100	4,162,100	426,000	9.3
2013	4,534,400	4,164,400	370,000	8.2
2014	4,518,700	4,218,400	300,300	6.6

Data Source: Total Labor Force, Employed, Unemployed and Unemployment Rate Estimates 2000-2014, NJ Department of Labor and Workforce Development

CLASS OF WORKER AND OCCUPATION

The majority of workers in 2013 living in Byram Township were a part of the private wage and salary worker group (84%). The second largest category was government workers (12%) followed by those who were self-employed. Those that worked within the private wage field were concentrated heavily in management/professional positions, which employed just under half the employed population in Byram Township. The sales and office and service occupations together employed another 40% of Township's employed population.

Class of Worker, 2013 - Byram Township

	Number	Percent
Civilian employed population 16 years and over	4,372	100%
Private wage and salary workers	3,661	83.70%
Government workers	516	11.80%
Self-employed in own not incorporated business workers	195	4.50%

Data Source: U.S. Census Bureau, 2009-2013 5-Year American Community Survey

Occupation, 2013 - Byram Township

	Number	Percent
Civilian employed population 16 years and over	4,372	100%
Management, business, science, and arts occupations	2,092	47.80%
Service occupations	583	13.30%
Sales and office occupations	1,155	26.40%
Natural resources, construction, and maintenance occupations	317	7.30%
Production, transportation, and material moving occupations	225	5.10%

Data Source: U.S. Census Bureau, 2009-2013 5-Year American Community Survey

COMMUTING TO WORK

According to the 2013 5-Year American Community Survey the mean travel time to work for those who lived in Byram Township was approximately forty minutes. More than 22% traveled more than an hour to get to work while 14.4% only had to travel less than fifteen minutes. The largest proportion of workers commuted by automobile (89.9%) with an overwhelming 80% driving alone while only 9.9% carpooled. 7.5% of Byram labor force worked from home.

Travel Time to Work, 2013 - Byram Township

		Percent
Less than 5 minutes	44	1.1%
5 to 9 minutes	175	4.4%
10 to 14 minutes	356	8.9%

15 to 19 minutes	459	11.5%
20 to 24 minutes	580	14.5%
25 to 29 minutes	145	3.6%
30 to 34 minutes	342	8.6%
35 to 39 minutes	115	2.9%
40 to 44 minutes	309	7.8%
45 to 59 minutes	550	13.8%
60 to 89 minutes	596	14.9%
90 or more minutes	316	7.9%
Total	3,987	100.0%
Mean travel time to work (minutes)	37.6	

Data Source: U.S. Census Bureau, 2009-2013 5-Year American Community Survey

Means of Commute, 2013 - Byram Township

	Number	
Workers 16 years and over	4,312	100%
Car, truck, or van -- drove alone	3,448	80.00%
Car, truck, or van -- carpooled	427	9.90%
Public transportation (excluding taxicab)	59	1.40%
Walked	31	0.70%
Other means	22	0.50%
Worked at home	325	7.50%

Data Source: U.S. Census Bureau, 2009-2013 5-Year American Community Survey

COVERED EMPLOYMENT

The Department of Labor collects information on covered employment, which is employment and wage data for employees covered by unemployment insurance. The tables below provide a snapshot of private employers located within Byram Township. The first table reflects the number of jobs covered in private employment from 2004 through 2014. The second table reflects the disbursement of jobs by industry and salaries in 2014. According to data from the New Jersey Department of Labor and Workforce Development, there was very little private employment in Byram Township from 2004-2014.

Private Wage Covered Employment*, Byram Township

Year	# of Jobs	# Change	% Change
2004	242		
2005	275	33	13.6%

Year	# of Jobs	# Change	% Change
2006	279	4	1.5%
2007	236	-43	-15.4%
2008	212	-24	-10.2%
2009	181	-31	-14.6%
2010	185	4	2.2%
2011	195	10	5.4%
2012	146	-49	-25.1%
2013	129	-17	-11.6%
2014	140	11	8.5%

Data Source: New Jersey Department of Labor and Workforce Development, Quarterly Census of Employment and Wages (QCEW), Annual Municipal Reports 2004- 2014

The table below reflects the disbursement of jobs by industry and salaries in 2014. It provides a snapshot of private employers located within Byram Township, and reflects disbursement of jobs by industry and salaries in 2014. Using annual average data, the most dominant industry was accommodations/food services and yet paid the third highest wages of all the industries. Retail/Trade was the second highest employment industry. The professional/technical services ranked lowest in employment, but was the highest paying industry of all, averaging an annual salary of \$40,106.

Private Employment and Wages 2014, Byram Township

Industry	Employment				Wages	
	March	June	Sept	Dec	Weekly	Annual
Utilities	.	.	.	.	-	-
Construction	.	.	.	.
Manufacturing	.	.	.	.	-	-
Retail/Trade	22	24	25	24	\$610	
Transportation/Warehousing	-	-	-	-	-	-
Finance/Insurance	-	-	-	-	-	-
Professional/Technical Services	7	7	8	8	\$771	
Admin./Waste Services	-	-	-	-	-	-
Healthcare/Social Assistance	-	-	-	-	-	-
Arts/Entertainment/Recreation	-	-	-	-	-	-
Accommodations/Food Services	51	93	76	54	\$284	
Other Services (except public administration)	.	.	.	.
Total	113	175	156	133	\$453	

Data Source: New Jersey Department of Labor and Workforce Development, Quarterly Census of Employment and Wages (QCEW), Annual Municipal Reports 2014

FUTURE EMPLOYMENT

According to the New Jersey Transportation Planning Authority estimates, the population in Byram Township will increase by 2,740 between 2010 and 2040, an overall increase of almost 33%. Employment is forecasted to more than double in the same 30 years.

New Jersey Transportation Planning Authority - Population, Households & Employment 2010-2040

	2010 Population (US Census SF1)	2040 Estimates	Estimated Number Change 2010- 2040	Total Percent Change 2010- 2014	Annualized Percent Change 2010-2040
Population	8,350	11,090	2,740	32.81%	0.90%
Households	2,930	3,970	1,040	35.49%	1.00%
Employment	1,110	2,410	1,300	117.12%	2.60%

Data Source: 2013 NJTPA Board-approved Municipal Forecasts

UTILITY INFRASTRUCTURE

A limited network of utilities serves the Township of Byram. Oil heat, individual septic systems, private neighborhood water companies, and individual wells comprise the primary utilities. The Township has no natural gas or town-wide potable water network. Only a small part of Byram is served by a sanitary sewer system, therefore, the primary method of wastewater disposal is through on-site septic systems.

The extreme environmental constraints placed on the Township by its topography, surface waters, surface geology, and soils and the limited development of regional systems have been the dominant factors in minimizing the utility network. In addition, the nature of utilities in the Township has been determined largely by the fragmented character of residential development, mostly centered on the Township's several lake communities, and by the Township's limited commercial sector. Although Byram maintains an identity as a lake resort community, most of the seasonal cottages are now year-round homes. This trend has placed a strain on the existing utility network of individual septic systems, small water companies, and private wells. The lack of sewers within the Township has caused the Township to enact legislation to regulate septic systems. New planning initiatives, on the local and State level, now support this approach and call upon municipalities like Byram to confine utility networks to limited growth centers and to prevent their spread into more rural areas.

ZONING

The following is a general outline of zoning within Byram Township with a more detailed review and discussion of the Commercial zones as they relate to Economic Development. The remaining zones are described generally.

Commercial

The Township of Byram contains one main commercial corridor along the southern section of Route 206 in the Township. The uses along the corridor range from small strip retail establishments to larger retailers such as Shop-Rite. There are other, smaller commercial areas scattered along the Route 206 corridor to the North at certain intersections and other locations. In total, commercial land uses comprise only 2.4% of Township parcels and 2.3% of Township acreage. Byram has only two purely commercial zone districts.

VB Village Business Zone

The Village Business Zone is intended to complement and be architecturally influenced by the primary focal point of development in the Village Center Mixed-Use Zone. The primary purpose of the VB Zone is to provide for complementary development in proximity to the Village Center Mixed-Use Zone through specific commercial uses and a limited number of apartment-style residential units above the first floor. This zone is currently not intended for single-family, townhouse, or condominium residential development.

The VB Zone plans for new commercial development and promotes the redesign or redevelopment of existing commercial development to establish a more village-like downtown that invites pedestrians and bicyclists and promotes certain architectural and landscape elements. The intent is to transform the high-speed, auto-oriented thoroughfare typical of highway-strip development into a neo-traditional 'Main Street' to attract residents and visitors.

Permitted uses include retail establishments, such as:

- ☐ Antiques store.
- ☐ Appliance/furniture store.
- ☐ Art studio.
- ☐ Bakery.
- ☐ Banks and financial institution, exclusive of drive-up service.
- ☐ Beauty/barbershop.
- ☐ Book shop.
- ☐ Clothing and apparel.
- ☐ Computer/office systems (not to exceed 2,000 square feet).
- ☐ Delicatessen/convenience market (not to exceed 1,500 square feet).
- ☐ Drugstore.
- ☐ Gallery and craft store.
- ☐ Gift shop.
- ☐ Paint and hardware store (not to exceed 2,000 square feet).
- ☐ Restaurant, exclusive of drive-up service.
- ☐ Shoe repair.
- ☐ Sports shop.
- ☐ Variety store.

And Service establishments, such as:

- ☐ Charitable and nonprofit organizations.
- ☐ Emergency services.
- ☐ Fraternal and civic organizations.
- ☐ Funeral home.
- ☐ Health and fitness center.
- ☐ Library.
- ☐ Photographer and/or photography store.

And Professional offices, such as:

- ☐ Business office.
- ☐ Medical and dental clinic.
- ☐ Professional/medical office.
- ☐ Veterinary clinic.

As well as Bed-and-breakfasts, inns, bars and taverns.

Conditional Uses include:

- ☐ Apartments above permitted commercial uses may be permitted as a second principal use, and
- ☐ The sale of fresh fruits and vegetables, service of foods and beverages and incidental entertainment may be permitted outdoors as accessory to a permitted existing principal use

Prohibited uses.

- ☐ Gasoline station, auto repair, auto body.
- ☐ Car wash.
- ☐ Adult entertainment and retail.
- ☐ Outdoor recreational facility.
- ☐ Drive-up service/facility
- ☐ Wholesale store and/or warehouse
- ☐ Industrial use
- ☐ Outdoor display or storage.
- ☐ Outdoor advertising or billboard.
- ☐ Dump, junkyard or environmentally destructive or contaminating use.
- ☐ On-site dry-cleaning facility.
- ☐ Banquet hall/catering facility
- ☐ Self-storage facility.
- ☐ Any use not specifically listed as a permitted or conditional use.

NC Neighborhood Commercial

The purpose of the NC zone is to maintain existing commercial uses and encourage small-scale neighborhood retail and service establishments for residential neighborhoods and lake communities to provide convenient shopping within walking or biking distance. The uses in this district are intended to be of low intensity and compatible with the surrounding residential uses in order to promote implementation of the objectives and goals of the Township's Smart Growth Plan. The NC zone provides both vehicular- and pedestrian-oriented commercial services to existing residential neighborhoods. The NC zone is not intended for uses that, due to size or method of operation, increase normal vehicular or truck traffic in the neighboring community.

Permitted uses include retail establishments, such as:

- ☐ Antiques store.
- ☐ Bakery.
- ☐ Book shop.
- ☐ Delicatessen/convenience market (not to exceed 1,500 square feet).
- ☐ Drugstore.
- ☐ Restaurant, exclusive of drive-up service.
- ☐ Variety store.
- ☐ Paint and hardware store (not to exceed 2,000 square feet).

And Service establishments, such as:

- ☐ Charitable nonprofit organizations.
- ☐ Emergency services.

Conditional Uses include:

- ☐ Outdoor cafes.

Prohibited uses:

- ☐ Strip shopping center. "Strip shopping center" means a commercial use or uses contained in one structure having a linear orientation which is approximately parallel to a roadway, with the majority of off-street parking located between the commercial structure and the roadway, which is designed primarily for automobile access and not pedestrian access.
- ☐ Gasoline station, auto repair, auto body uses.
- ☐ Drive-up service/facility.
- ☐ Wholesale store and/or warehouse.
- ☐ Industrial use.
- ☐ Use requiring delivery by tractor-trailer.
- ☐ Outdoor display or storage.
- ☐ Outdoor advertising or billboard.
- ☐ Dump, junkyard or environmentally destructive or contaminating use.
- ☐ On-site dry-cleaning facility.
- ☐ Banquet hall/catering facility.
- ☐ Self-storage facility.
- ☐ Any use not specifically listed as a permitted or conditional use.

Industrial

Only 171 acres of the township are used for Industrial purposes. The quarry located on Lackawanna Drive is the only Industrial center in Byram Township. Through legislation and the restrictions of the Highlands Act, the Quarry will expand very little if at all in the coming years.

IPR Industrial Professional Recreational

The IPR Zone accommodates the existing quarry use and encourages the development of clean industrial facilities, professional office parks, or commercial recreation businesses. Permitted uses in the IPR include car washes, professional offices, light manufacturing, car rental, and medical offices. The zone has a minimum lot size of 21.5 acres and large setback requirements, up to 300 feet, to provide a buffer between the uses and Route 206 and Lackawanna Drive.

Permitted uses include:

- ☐ Professional office development.
- ☐ Car wash.
- ☐ Car rental.
- ☐ Light manufacturing, fabricating and assembly plant.
- ☐ Printing and publishing.
- ☐ Research laboratory.
- ☐ Agricultural, farm and horticultural use.
- ☐ Greenhouse and nursery.
- ☐ Commercial recreation business.
- ☐ Medical office park and/or clinic.
- ☐ Veterinary clinic.
- ☐ Private school or college.
- ☐ Charitable, environmental or land trust organization.

Prohibited uses:

- ☐ Commercial incineration.
- ☐ Junkyard.
- ☐ Rubbish, garbage or trash dump.
- ☐ Trucking terminal.
- ☐ Mining, quarrying, crushing, smelting and operations related thereto.
- ☐ Gasoline stations, public garages, auto repair and car sales lot.
- ☐ Outdoor storage of material or equipment.
- ☐ Residential use.
- ☐ Tar plant or concrete or bituminous concrete processing plant.
- ☐ Sludge composting facility.
- ☐ Dry-cleaning plant.
- ☐ Auto body shop.

Mixed Use**VC Village Center Mixed-Use Zone**

The Village Center Mixed-Use Zone is intended to be the primary focal point of new development and takes advantage of its central location and proximity to community amenities and infrastructure. The primary purpose of the VC Mixed-Use Zone is to provide for carefully planned development, through mixed-uses and specific commercial and residential components. The VC Mixed-Use Zone is intended to provide pedestrian-oriented commercial services to future and existing residential neighborhoods, and to create a new, 'neo-traditional' 'Center' that serves as a community focus for the Township.

The intent of this zone is to encourage reasonable new development, while still providing for open space, common greens, and civic centers. The Village Center concept, through comprehensive project design, is to be the defining element for any new development. The Village Center Mixed-Use Zone is approximately 60 acres in size and is located along Route 206. Development is highly restricted by the limited reserved sewerage capacity of 40,000 gallons for this specific area. The Village Center Mixed-Use Zone has access to wastewater utility services via a contract agreement with the Musconetcong Sewer Authority, to provide capacity of approximately 40,000 gallons per day. The total capacity of Center based development and redevelopment will primarily be limited by sewer capacity conditions. The public water utility for the Center is anticipated to be with NJ American Water via an extension of the existing water line at the Route 206 Stanhope border. Project developers may explore alternate options including exploring on-site water sources, however, with final proposed plans to be incorporated into development applications.

Primary intended uses.

- ☐ Retail stores, such as bookstore, clothing and accessory boutique, bakery, jeweler, florist, pharmacy.
- ☐ Service establishments.
- ☐ Professional offices.
- ☐ Financial institutions exclusive of drive-up service.
- ☐ Restaurants exclusive of drive-up service.
- ☐ Mixed-use buildings containing a combination of permitted uses. Residential shall be on the second floor only.
- ☐ Community and municipal buildings.
- ☐ Public open space.

- ☐ Apartments (on upper floors) of permitted commercial uses.
- ☐ Single-family detached dwellings.
- ☐ Two- to four-family dwellings.
- ☐ Senior housing.
- ☐ Live/work uses for licensed professionals, service providers and artisans.
- ☐ Bed-and-breakfast facilities; inns.
- ☐ Bars and taverns.
- ☐ Health and fitness centers.
- ☐ Open space land permanently protected through conservation easements.

Prohibited uses:

- ☐ Gasoline stations or auto repair, auto body uses.
- ☐ Commercial uses with a footprint of structure in excess of 10,000 square feet or requiring more than 40 parking spaces.
- ☐ Drive-up facilities and uses.
- ☐ Wholesale stores and/or warehouses.
- ☐ Industrial uses.
- ☐ Uses requiring delivery by tractor-trailer.
- ☐ Outdoor display or storage.
- ☐ Dump, junkyard, or environmentally destructive or contaminating uses.
- ☐ On-site dry-cleaning facilities.
- ☐ Banquet hall/catering facilities.

Residential

Residential parcels constitute the majority in the Township. They represent 77.4% of the total number of parcels and about 17% of the land area. Apartments are an insignificant land use classification in the Township, representing only three parcels and about 0.1% of net taxable value. Almost 86% of the municipal tax base is generated from residential properties. Byram has five different single-family residential zones and a recently adopted multi-family zone.

R-1 Residential

The R-1 zone permits single-family homes, agricultural uses, home businesses, and commercial greenhouses. The R-1 zone has a maximum density of 1 unit per 10 acres with a minimum building lot of 1 acre. The 10-Acre Density Residential Zone (R-1) is intended to preserve much of the constrained and undeveloped land in the Township. The R-1 10-Acre Density Residential Zone occurs in three large areas and several smaller areas.

R-2 Residential

The R-2 zone allows for a maximum density of 1 unit per 5 acres with a 1-acre minimum building lot. Permitted uses in the R-2 zone include single-family homes, agricultural uses, home businesses, and commercial greenhouses. The R-2 5-acre Density Residential Zone is intended to provide low-density residential development opportunities in forested areas and serve as a transition between 10-acre R-1 zones and higher density residential areas. The R-2 5-acre Density Residential Zone occurs in five large areas and several smaller areas. The basic extent of the R-2 is the lower density areas surrounding or between higher density zones in the Lake Communities.

R-3 Residential

The R-3 zone permits single-family homes, home businesses, and up to two boarders per family on lots with a minimum area of 40,000 square feet.

R-4 Residential

The R-4 zone permits single-family homes, home businesses, and up to two boarders per family on lots with a minimum area of 20,000 square feet. The R-4 Zones are scattered throughout the Township.

R-5 Residential

The R-5 zone permits single-family homes and home businesses on lots with a minimum area of 10,000 square feet. These R-5 Zones are scattered throughout the Township.

MF Multifamily Residential Zone

The Multifamily Residential Zone is 5.2 acres in size and includes the former Consolidated School building and grounds. The permitted uses of the new Multi-Family zone provide for the adaptive reuse of the existing building as multifamily housing at a density of no more than 4.1 units per acre (no more than 21 housing units) or the continued use of the buildings as an educational or municipal use. The reuse of the existing building as multifamily housing also requires that 15% of the residential units be deed restricted as affordable housing if the project is a rental project and that 20% of the residential units be deed restricted as affordable housing if the project is a for-sale project.

Other

The Township also has considerable open space and other miscellaneous space that is tax exempt and does not produce any employment or residential development. The Township does not expect growth in these miscellaneous areas.

OS Open Space

The Township created an Open Space Zone (OS Zone) to recognize areas under public ownership that are not planned for future development, including parcels currently in permanent open space protection or those that become protected in the future (where zoning would automatically change to OS once such parcels are preserved). Only areas actually in public ownership should be included in this zone, because of the highly restrictive nature of the requirements that will ensure their continued use as open space. Any commercial or residential uses are prohibited in the OS zone.

GC Golf Course

The Township created a Golf Course Zone (GC Zone) for those areas already developed as golf courses. This zone recognizes these areas as golf courses and limits their development potential if the current use ceases.

FP Family Theme Recreation Park

Only the Wild West City Theme Park is currently zoned FP, and there are no plans to change this use. The Wild West City FP Zone lies immediately northeast of the Village Center Mixed-Use Zone.

CR Commercial Recreation

The Commercial Recreation Zone encompasses all private campgrounds or recreational vehicle parks. The largest CR Zone is the Allamuchy Boy Scout Reservation, surrounded by Allamuchy Mountain State Park. There are five other private campgrounds in the Township that are in this zone at Panther Lake, Tomahawk Lake, Columbia Valley, Jefferson Lake, and the area along Lubbers Run associated with the Hudson Farm. The CR zone is designed to permit certain commercial, recreational and open-air uses limited to golf courses, golf driving ranges, pitch-and-putt courses, riding stables, swim clubs, tennis clubs, picnic grounds, children's camps, campsites and retail sales and services that are accessory to these recreational activities. The minimum lot size for the zone is 20 acres.



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INTRODUCTION:

Over the summer months of 2015, JGSC made multiple field visits to Byram Township to examine multiple facets of the local economy in order to determine:

1. What is Byram's trade area¹?
2. What retail categories do the people of Byram's trade area want?
3. What categories does Byram's economic data reveal that they would support?
4. And, does Byram have the commercial infrastructure to support those categories?

JGSC's process is called "Community Insights™", and it investigates 3 areas—infrastructure,

spot



community opinion, and economic data—to find the sweet

of business categories where all three areas overlap. In other words, where a category of retail—for example,

“shoe stores”—is compatible with the physical infrastructure available (or developable) in the community, and not obstructed by area competition; is desired by expressed community opinion; and is shown to be sustainable by available economic performance data for the

community's trade area, then JGSC may recommend that

category as part of Byram's strategic plan for commercial growth. Our research goes a step further, to determine whether the community's current trade area is appropriate, or whether, through enhanced retail mix, events, and marketing the community might expand its trade area to attract more visitors. We refer to the actual trade area as the “primary” one, and the potential expansion (where that is possible) as its “secondary” one.

INFRASTRUCTURE:

¹ The “trade area” for the business district of a community is the geography from which the large majority—for our purposes, at least 70%—of the shoppers of that community derive.

² At 16.2%, Byram's retail vacancy rate exceeds the northern NJ State average by 10% for that period, based on

Our examination of commercial infrastructure was a field inventory of all commercial buildings and businesses in Byram. From this documentation, we were able to determine the level of vacancy, the number of commercial locations with retail, and the nature of the retail businesses, also described as “retail mix.”

These are the dominant categories of your retail mix throughout Byram.

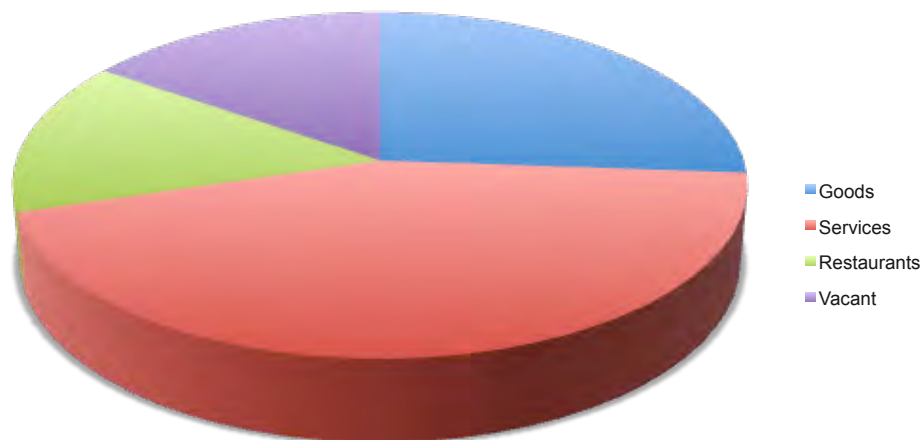
Total commercial locations at grade: 115

Total commercial locations at grade that can offer retail: 105

Retail businesses by major category:

- Vendors of retail goods: 29 (27.6%)
- Vendors of retail services: 45 (42.9%)
- Restaurants: 18 (17.1%)
- Vacant retail locations: 17 (16.2%)

This chart demonstrates how your retail businesses break down among the major categories of vendors of goods, vendors of services, restaurants, and vacant storefronts:



The sizable purple wedge in the chart represents Byram's vacant storefronts. We take particular note that your commercial vacancy rate is significantly higher than the regional average for the period this observation was made². This raises a concern that there may be an underlying problem contributing to that high rate. However, it is also noteworthy that Byram is a relatively small commercial district with a small number of total commercial locations; a single vacancy in such a small total number of stores results in a higher vacancy percentage than would a single vacancy in a district with 300 commercial locations or more. We determined to explore the vacancy issue more in depth in our merchant and stakeholder interviews, and this report offers further discussion of the issue in that section.

Byram's offering of stores that sell goods is particularly low, in comparison with other similar districts we have measured. If one recognizes that retailers in Byram's commercial district are in direct competition with retailers in regional malls and shopping centers, the problem of a retail mix with low participation of vendors of retail goods becomes apparent. Only stores that sell goods can stimulate visits for browse-shopping and for comparison shopping, it is apparent that the dominant presence of service businesses in Byram makes it less attractive for shopping visits. When the high percentage of retail vacancies is also considered, the visitor attraction problem is even more apparent.

Access:

We considered the configuration of the retail infrastructure, and found that it is strictly auto-oriented. The vast majority of retail businesses in Byram are located on or near State Route 206. Although the speed limit on that road is 35 mph through town, the traffic keeps a faster pace of 40-55 mph; particularly now that the roadway is a two-lane highway. The highway poses advantages and disadvantages to retailers and their consumers:

² At 16.2%, Byram's retail vacancy rate exceeds the northern NJ State average by 10% for that period, based on data we obtained from the Goldstein Group. They measure retail commercial vacancy in northern and central markets in NJ, and published an average rate of 6.2% in their report "2015 Mid Year Vacancy Report Shows Retail Vacancy Rate Remains the Same," dated October 5, 2015. That report is found here: <http://www.thegoldsteingroup.com/category/vacancy-reports/>



Advantages of Route 206:

- Route 206 is the main route of ingress/egress into Sussex County from Morris County, so the high number of travelers utilizing this route must pass by retail storefronts³ located there;
- It is the primary route for access to Interstate 80, adding additional traffic volume to this section of Route 206;
- It carries high volumes of traffic through a town with an otherwise small population, giving businesses there exposure to much higher population counts than the total town population.

Disadvantages of Route 206:

- Traffic moves faster than it would through a traditional downtown business district, making it difficult for car travelers to identify the businesses they are passing;
- Concrete barriers to divide the traffic prevent some left turns into businesses;
- High traffic can deter people from making left turns across oncoming traffic into businesses;
- High traffic during commuter hours can deter people from stopping to shop or dine in Byram.
- All businesses on Route 206 are auto-oriented: set back behind on-site parking, they can be difficult to identify without appropriate monument signage.
- Driveway entrances into Route 206 businesses can be narrow, sudden, and confusing.
- Businesses not located along the Route 206 corridor must survive on the strength of resident business alone, and there is too little of that: only 8,240 residents in 2,907 households.

³ The measure of car counts that pass a storefront location is one of several criteria that major retailers use to determine the viability of a retail location; the high car counts of Route 206 are an attractive feature to many retailers. Current, actual car counts for Route 206 in Byram are provided in the economic data appended to this report.

Other infrastructural disadvantages apply to the businesses located on Route 206, although these are not related to the highway:

- Restaurant businesses must deal with the limitation on liquor licenses; if unable to acquire a license, new restaurants are further restricted from offering BYOB service.
- Restraints on sewer, water, and natural gas access on developable sites make new retail development more challenging.

Next, we considered ease of access to Byram's commercial district, and to its individual stores. Byram scores very highly with regard to access: Interstate Route 80 passes east/west through the southern end of Byram Township, and State Route 206 runs north/south through the town. With the commercial district positioned on the State highway, it is very direct, quick, and simple to find the district from local and regional points. As already noted above, Route 206 is a primary gateway of Sussex County residents into their county. As a result, both area residents and regional visitors not only find it easy to reach the commercial district; they are compelled to pass through it on a regular basis. Moreover, the recent addition of a second lane of traffic through Byram on Route 206 has eased what used to be perpetual traffic jams during rush hours in town.

Parking is another component of access, and Byram scores well in this, too. Most downtown business districts rely heavily upon on-street parking to accommodate shoppers. Instead, all Byram retailers have on-site parking lots at their locations, so parking is never a problem for shoppers.

The only negative issues that we note with regard to access to Byram's commercial district are these:

- Because it is located on a State highway, access from one side of the district to the other—either by left turn in a motor vehicle, or by pedestrians crossing on foot—is challenging. At some places, left turns are blocked by concrete barriers; at others, waiting for traffic to pass to allow the left turn is tedious, and may discourage shoppers. Pedestrian crosswalks are well-developed with clearly marked pathways,

pedestrian signals, and buttons to summon traffic light changes; however, the heavy traffic on Route 206 and the lack of practical, comfortable walkways along some parts of the highway may explain why we rarely saw pedestrians using them.

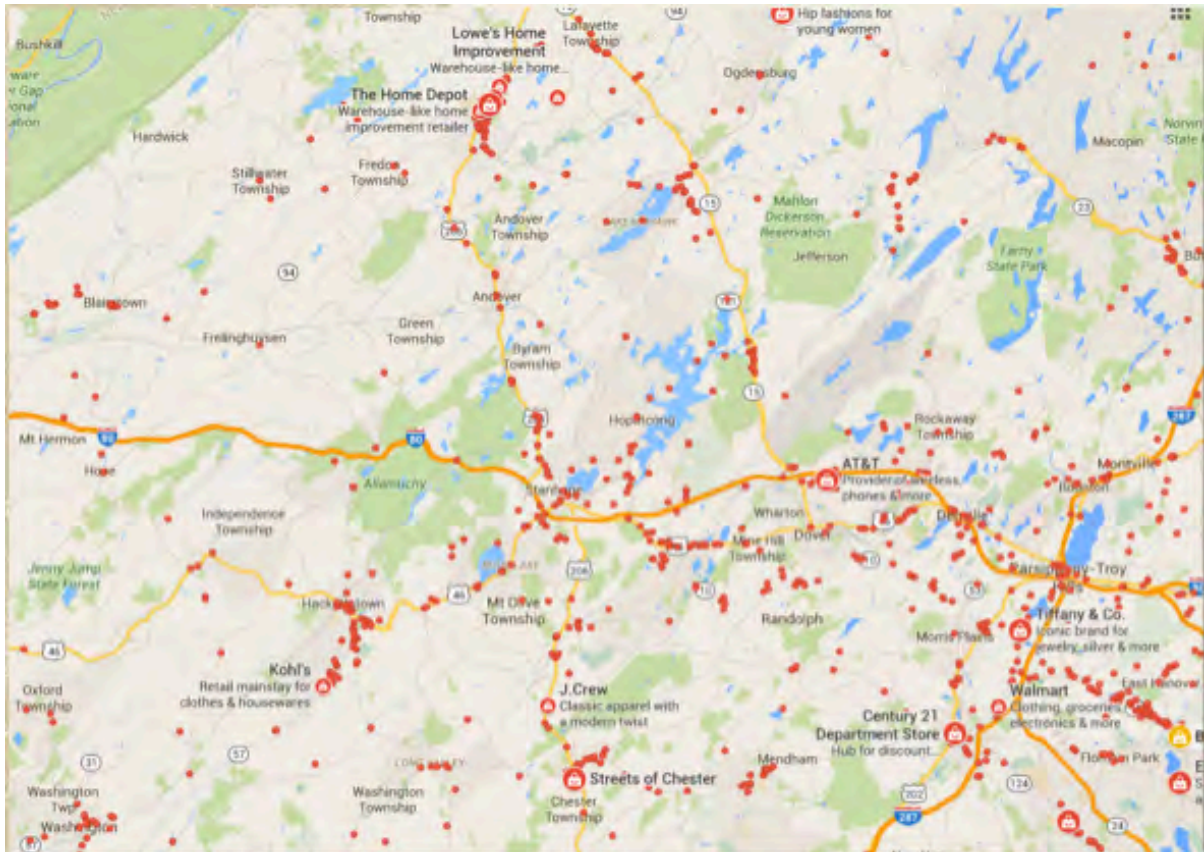
- There are no signs directing visitors to Byram's commercial district, or gateway signs announcing arrival there.

Regional competitors:

Next, we considered the proximity and nature of regional retail competitors to the retailers of Byram's business district. The map on the next page shows major competitive centers that provide shopping/dining options for people in Byram's trade area. (On the survey, we asked about specific regional shopping choices, and this report includes a discussion of Byram residents' regional shopping preferences in the section on our consumer survey results.)

Here is a partial list of major retailers represented at area malls and shopping centers:

- | | |
|---------------------------------|---------------------------|
| • American Eagle Outfitters | • J.C. Penney |
| • Apple Store | • Kay Jewelers |
| • Bath & Body Works | • Kohl's |
| • Bed, Bath & Beyond | • Lane Bryant |
| • Best Buy | • Lord & Taylor |
| • Brookstone | • Lowe's Home Improvement |
| • Christmas Tree Shoppes | • Modell's |
| • Coach Leather | • Nordstrom Rack |
| • Cohen's Fashion Optical | • Old Navy |
| • Designer Shoe Warehouse (DSW) | • Sam's Club |
| • Dick's Sporting Goods | • Sears |
| • Foot Locker | • Target |
| • Game Stop | • TJ Maxx |
| • Home Depot | • Walmart |
| • J. Crew | • Zales The Diamond Store |



But for Newton, retail competitors (shown in red) are concentrated to the south and east of Byram. As it happens, most of these retailers are major national and regional businesses that are so dominant that they foreclose certain categories of retail to Byram. For example, women's, men's, juniors', and children's clothing categories are precluded in Byram (with the exception of specialty clothing categories, such as bridal, formal wear, infant, custom dress, work uniforms, and other similar specialties not found in malls or shopping centers) because these categories are so well served in by major retailers present in the region. Another major category that is essentially foreclosed is building materials/hardware, due to the presence of Lowe's Home Improvement and Home Depot.

We say a retail category is "foreclosed" always with a caveat: any small retailer that offers a special niche of product or distinctive level of service within a category that elevates them

out of head-to-head competition with a national or regional retail competitor may still be a viable candidate for a downtown business district. Still, it is important to recognize the high hurdle that is presented in the attraction of new retailers in an environment that is so well represented in so many retail categories by nationally or regionally-known department stores, chains, franchises, and big-box stores.

Redevelopment opportunities:

Next, we examined to find redevelopment opportunities within the business district. The primary opportunity is the “Village Center” site on the south side of Lackawanna Drive at Route 206, which has been approved by local zoning and Highlands Council review for development as a village center, with mixed-use structures that could contain up to 150 units of housing, retail, or office use. This approximately 60-acre, unimproved property is privately owned (by the Stabile family that also owns the adjacent Wild West City attraction to the north of the site); there are no plans or agreements in place for its development at present. It is the largest development site currently available in Byram Township.

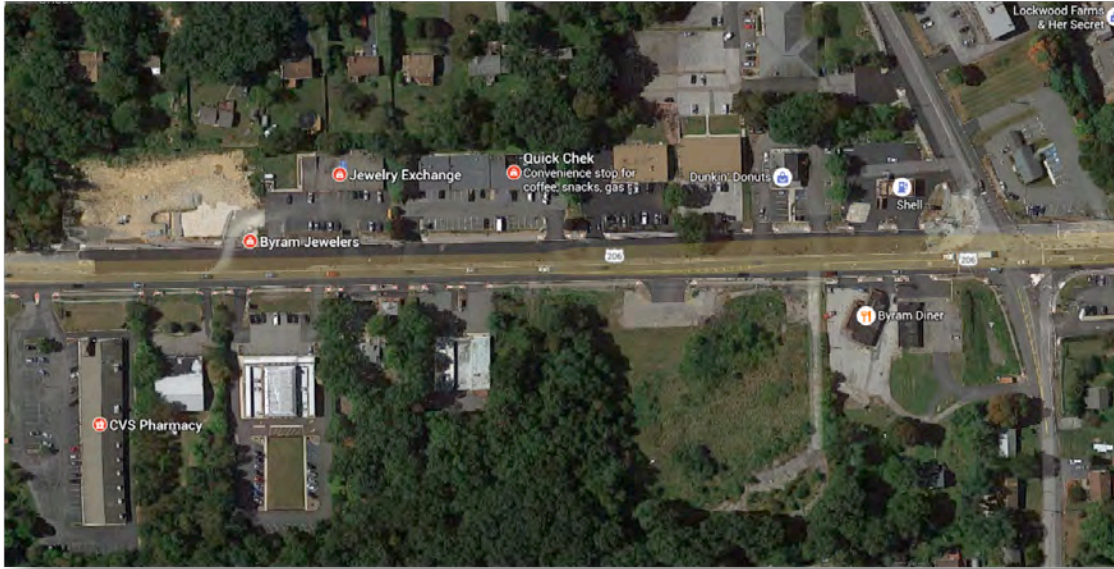
We also found several undeveloped/under-developed sites on or near Route 206 closer to the intersection of Waterloo Road/Brookwood Road in Byram. Our interviews disclosed that a few have private redevelopment plans that are pending. All of these sites offer opportunities to:

- Construct to the build-to line; (eliminate front setbacks);
- Raise the street-wall⁴ along the Route 206 corridor, or adjacent to it;
- Aggregate properties for integrated development rather than solitary strips;

⁴ “Street-wall” is an architectural concept that is a desirable feature of walkable business districts. It is defined as a sense of enclosure of the pedestrian thoroughfare that is created by the facades of commercial buildings in relation to the width of the street that they face. Enclosure lends definition to the business district, and gives the pedestrian a feeling of comfort while walking in the district. The threshold when pedestrians first perceive enclosure is a 1:4 ratio of building height to thoroughfare width—typical of low-density environments. In denser urban contexts, height-to-width ratios between 1:3 and 1:2 create an appropriate enclosure on a thoroughfare. See this reference material on walkable commercial thoroughfares:

<http://www.ite.org/css/online/DWUT04.html>

- Initiate development of a walkable retail corridor with potential linkage to any new retail/residential development at the Village Center site.



This aerial photo shows vacant lots on both sides of the Route 206 corridor, and under-utilized commercial properties (such as the Byram Diner, and the vacant storefront next to it at 26 Route 206).

One other redevelopment opportunity worth mentioning here is a site currently owned by Tilcon New Jersey at 111 Lackawanna Drive, opposite the Village Center site, and directly north of the ShopRite Plaza shopping center. This site is large, virtually unimproved (there is one storage building on the site), and due to its adjacencies, this would be prime retail real estate. It is not on the market, but it should be included in discussion of any plan for creation of a village center, as development of this site could contribute to the critical mass of retail space and residential space necessary to make a village center work effectively.



This aerial photo shows the Tilcon New Jersey site at 111 Lackawanna Drive, the undeveloped Village Center site across the Drive, and the ShopRite Plaza, immediately west of the site.

Infrastructural conclusions:

These are the conclusions that we drew from our review of Byram's commercial infrastructure:

- Existing commercial infrastructure is older—built from 1930's to 1970's, and is configured for highway/auto only (any walkable retail infrastructure that may be desired would have to be developed);
- Vacancy is much higher than the regional average, which suggests a potential problem with existing commercial stock, location viability, rent levels, and/or regional retail competition;



- Access to the business district, with reference to connection to major highways, traffic counts, and parking, is excellent, although signage is poor;
- The amount of retail space is limited; with 105 units existing, and a new pharmacy-anchored strip center in development, we estimate total retail space to be less than 250,000 sf, and most units are less than 2,000 sf in size;
- Despite its limited size in square footage, the business district is too large to be supported by Byram's residential community (population of 8,240) alone; and requires the support of outside visitors;
- The retail mix is imbalanced: it is top-heavy with service businesses, hampered by significant vacancy, and less than one-third of all businesses are vendors of retail goods. A district that needs to attract outside visitors needs to have a higher concentration of businesses that sell retail goods;
- The retail space is scattered across separate sites along a length of Route 206 that extends for nearly 3 miles, requiring visitors to move by car from one store to the next;
- Sites are available for new retail development along Route 206, but they are somewhat constrained by limited sewer and water availability, and their limited size precludes consideration of large-space retail development;
- Regional competition includes major national and regional retailers that foreclose entire retail goods categories from consideration, including family (men's, women's, juniors', children, etc.) clothing, shoes, building supply/hardware, housewares, and jewelry.

COMMUNITY OPINION

Merchants

We stopped and spoke with Byram merchants at random all over the community. Most would not consent to interviews, but fifteen⁵ did talk with us. Our intent was to gain a cross-section of opinions from individuals that own their retail space, those who rent it, those that sell goods, those that provide services, those that are restaurateurs, those that have been in Byram for many years, and those that are newcomers.

Their issues are fully summarized in a document that is appended to this report.

While some merchants have seen improved economic performance this year over last, they are few—most have experienced lower revenues 2015 over 2014. All merchants interviewed would like to see efforts mounted to increase business; many favor new development to add to the number of businesses in Byram.

One key finding was that most merchants do little marketing of their own, including websites and social media. They need help to learn how to gather email addresses for their customers, and to create websites. There are significant opportunities for cooperative marketing.

⁵ We interviewed representatives of the Byram Diner; Pro Plaza 206/Khanna Financial Advisors; Frogmore; Realty Executives; Trout & Troll/Salt; ShopRite; Halulu Restaurant; Byram Jewelers; Nutrition Zone; Hafner Laboratories, Inc.; Cones By Design/Re-Designs Thrift Shoppe; Nissan; and GNC.

Stakeholders

We also interviewed nearly two-dozen individuals⁶ that the Township identified as stakeholders: people with a vested interest in the future of commerce in Byram Township.

From the stakeholders, we learned that:

- There is no center of Byram, but unlinked and isolated neighborhoods;
- There is a sense that local government is trying to be business-friendly, but that a series of measures (prohibition of B.Y.O.B. in restaurants without liquor licenses; restrictive sign ordinance; restrictions against privately-sponsored events in the shopping center parking lot; prohibition of new gas stations; support of anti-commercial development residents of Brookwood Road) suggest instead that there may be some further improvements necessary;
- There are conflicting visions for the future of commerce in Byram, with some stakeholders favoring development of a walkable village center with small boutique stores, others favoring attraction of only large national retailers, and still others opposed to any development whatsoever in the Township;
- There is not enough inter-connectivity among merchants, and with community agencies (Allamuchy State Parks, Waterloo Village) with whom common marketing programs could yield more business for Byram merchants.
- There are too few events in Byram to bring residents together, and there is no common location close to Byram merchants where events could be held in a way that benefits business.

Most stakeholders want change/improvement, and embrace some form of development.

There is high awareness of the Village Center plan, and substantial stakeholder support for it.

A few stakeholders consider the plan to be unworkable, and that only auto-oriented shopping

⁶ Katie Baron, Brad Boyle, Steve Ellis, Clerk Doris Flynn, Mike & Penny Holenstein, Dan Kreuder, Rich Kuncken, Andrew McElroy, Margaret McGarrity, Dan & Barbara McLaughlin, Jeanne Moran, Mayor James Oscovitch, Andrea Proctor, Mario Provenzano, Dave Romano, Luis Rodriguez, Dan Ruth, Angel Sabatini, George Shivas, and Mike Tufaro.

centers will work commercially along Route 206. A few other stakeholders are opposed to development altogether, preferring to minimize or halt development to preserve Byram's natural aspect.

We also spoke with some merchants, commercial property owners, and stakeholders about commercial rents in Byram, in an attempt to better understand the high rate of commercial vacancy. In addition, we examined commercial rent records maintained by the Township. We learned that some owners have had to offer rent reductions in order to maintain tenants, in the face of rising property taxes and maintenance costs that are dynamic pass-through components of commercial leases. One major commercial property owner provided proof that they have reduced rent by one-third for their commercial tenants, and that with that reduction, property taxes now comprise an amount equal to the rent rate: \$10/sf.

The quandary that this poses for new retail development is that it may not be possible to recoup the cost of a new building for retail with such low rents. We learned from one stakeholder that the cost to build modern retail space in Sussex County is about \$200/sf. To recover that cost over a reasonable amortization period, retail rates need to be in the \$18-\$20/sf range. In practical terms, that is roughly double the rate of rent that most commercial tenants are paying in Byram.

For retailers, rent is a function of sales. The amount of rent should not exceed 10% of the gross revenue a business is earning in sales, or it begins to affect the profitability of the enterprise, and the ability of the business to remain open. Clearly, part of the challenge of finding new businesses for Byram will be to identify business categories that generate higher revenue per square foot, and/or to find ways to supplement their rent contribution in order to subsidize the retail business. One such supplement would be to create new retail space in mixed-use buildings, for which the financing is tied to the rental of the residential units above, allowing the retail space to be rented at lower cost. Another method might be real estate tax incentives that would lower the overall cost of the commercial space.

Consumers

We also spoke with the community at large, through an online survey in which we invited people to respond to three-dozen questions about Byram. Many were multiple choice, several applied Likert scales for degrees of interest, and still others allowed open, unprompted responses for which people could type-in their answers. In one month, we received 1,415 responses: a remarkable sampling! With such a high response, the margin of error is extremely low (2.7%)—meaning that when we apply the answers of this representative group to the 8,240 residents of Byram, it would be an accurate reflection of their viewpoints within a two-and-a-half point swing in either direction.

This means that the data is highly reliable. Retailers and developers that use survey data normally require a 5% margin of error for accuracy; your data is much more reliable.

A copy of the survey questions, and a summary of the survey results, are appended to this report. Here are a few of the salient points from those results:

Overview – The survey was conducted online from September 7, through October 12, 2015. A total of 1,415 responses were received, resulting in a 2.7% margin of error. The survey was promoted to residents and visitors using roadside signs, email and social media messages, press releases, and flyers distributed to schools and businesses.

Who took the survey

- Of the 1,415 completed surveys, 86% were from residents of Byram Township.
- 71% of residents have lived in their current zip code for 10 years or more.
- Among all respondents, 61% are female and 39% are male.
- The typical household has 2.4 adults and 1.2 children.
- The average respondent is 47.3 years old and 57% are age 45 or older.
- The average household income of respondents is \$129,805 and 63% of all respondent households have income greater than \$100,000 annually.

What's important to accomplish

- Among all respondents, 74% say it's "very important" to retain existing businesses.



- 65% of all respondents say it's "very important" to attract new dining places, while 62% want more new retail businesses.
- 54% of all respondents say it's "very important" to actively revitalize storefronts and building facades.
- Half of all respondents said that it is "very important" to attract more eco-tourism business.

Dining and shopping preferences

- On average, respondents dine out 7.9 times a month and spend \$180 per person in a month.
- Among residents, Byram captures just 37% of dining visits and 31% of dining spending.
- Among non-residents, Byram captures 31% of visits and 26% of dining spending.
- A small percentage (16%) indicated that they never dine in Byram.
- On average respondents shop 9.0 times a month and spend \$527 a month on retail goods and services.
- Among residents, Byram captures only 26% of shopping visits and just 10% of spending.
- Among non-residents, Byram captures 21% of shopping visits and 7.5% of spending.
- More than one-third (36%) of all respondents indicated that they never shop in Byram. Nearly one-half (48%) of non-residents indicated that they never shop in Byram. This reveals a huge market opportunity within Byram's current trade area.

*Preferred shopping centers*

- The shopping centers visited most often by Byram residents are ITC Crossing, Rockaway Mall, Roxbury Mall, and Ledgewood Mall.
- The shopping centers shopped least frequently by Byram Residents include Sutton Plaza shopping center, Hackettstown Mall, and Village Green shopping center.

Main reasons for not visiting more often

- 72% of all respondents say they don't visit more often because of the limited offering of stores / shops.
- 67% don't visit more often because of the limited selection of dining places.
- 57% don't visit more often because Byram "doesn't have the stores I like."
- Only 2% of residents list traffic congestion as their main reason for not visiting, while 15% of non-residents gave this reason. This indicates that non-residents may not be as aware as residents that the improvements to Route 206 have been completed, and traffic congestion is no longer commonplace in Byram.

Would shop and/or dine more often if Byram offered more...

- 70% of all respondents say they would shop and/or dine in Byram if it offered more full-service restaurants.
- 68% want a fresh produce market.
- 57% want a butcher shop for fresh meats and poultry.
- 52% want a gourmet food store.
- 51% want a seafood, fish market.
- 50% want baked goods / bakery.

Features of commerce rated "good" along route 206, in order:

- Among all respondents, the most (55%) said "safety during the evening" is good.
- 53% ranked convenient parking as good.
- 49% ranked the clear directional signage as good.



- 45% ranked “smoothness of traffic flow” as good; however, only 30% of non-residents said this. (Once again, this indicates that non-residents are not as aware that Route 206 improvements are complete, and have eased traffic congestion through Byram.)
- 38% of all respondents rated the “cleanliness of streets, sidewalks” as good; but note that significantly more non-residents (48%) feel this way.
- Only 11% rated “comfortable places to sit” as good.

Features of commerce rated “poor” along route 206, in order:

- Among all respondents, the most (52%) indicated that “comfortable places to sit” is poor.
- 49% said the “selection of eating places” is poor; although fewer non-residents (38%) feel this way than do residents (50%).
- 47% of all respondents named the “variety of businesses” as poor.
- Nearly one-third of all respondents (30%) indicated that “overall appearance” is poor; however, significantly fewer non-residents (19%) feel this way than do residents (32%).

Types of commercial development rated “very appealing” for the Village Center, in order:

- The choice rated “very appealing” to nearly two-thirds (63%) of all respondents was a “walkable village with distinctive shops / restaurants”. This was true of residents (63%) and non-residents (62%) alike. This was the dominant preference of a strong majority of the group.
- The next largest group (41% of all respondents) indicated that a “shopping center with national retailers” would be “very appealing”.
- Slightly more than one-third (36%) of all respondents considered a “small group of stores to serve everyday retail needs” as “very appealing”.
- One in five of all respondents (20%) found “no commercial development” to be very appealing



- 19% of all respondents considered “professional and/or medical offices” to be “very appealing.”

Types of commercial development rated “not appealing” for the Village Center, in order:

- The only choice selected by a majority of all respondents (52%) as “not appealing” was “no commercial development”.
- Next, 37% of all respondents indicated “professional/medical offices” were “not appealing”.
- Just over one-third (34%) of all respondents rated “shopping center with national retailers” as “not appealing”.
- Just over one-fourth (27%) of all respondents described a “small group of stores to serve everyday retail needs” as “not appealing”.
- Only 12% of all respondents considered a “walkable village with distinctive shops / restaurants” to be “not appealing”. Moreover, while 13% of residents felt this way, a much smaller percentage (8%) of non-residents indicated this.

These results indicate strong support for development of the Village Center zone, and a preference for destination retail (“distinctive shops and restaurants”) rather than convenience retail (“stores to serve everyday needs”). Moreover, the respondents clearly would like to see this commercial development in a traditional neighborhood development format (“walkable village”).

Number that agree with statements about types of housing, ranked in order:

- Among all respondents, the largest amount (61%) agrees there is “adequate move-up housing” (single-family homes larger than start-up homes). However, only 41% of non-residents agree that this is true.
- Slightly less than one-third (31%) of all respondents agree there are “adequate affordable housing options”. Only one in five (20%) of non-residents agree with this.
- Just under one-fourth (24%) of all respondents agree there is “adequate housing for young people”. Only 14% of non-residents agree with this.

- Just 8% think there is adequate housing in which empty nesters may downsize.

Number that disagree with statements about types of housing, ranked in order:

- Nearly two-thirds (63%) of all respondents disagree with the statement that Byram provides adequate housing for empty nesters. Among residents, the number rises to 65% who disagree, while 48% of non-residents disagree with the statement. This is a clear showing that a strong majority of residents feel that there are not enough housing options for empty nesters in Byram. By their estimation, this is least-adequately served housing category in Byram.
- 44% of all respondents disagreed that Byram “provides adequate housing for young people”.
- 39% of all respondents disagreed that Byram “provides adequate affordable housing options”.
- 16% of all respondents disagreed that Byram “provides adequate move-up housing options”.

Interest in types of housing:

- 30% of all respondents expressed high or moderate interest in townhouses for purchase.
- 29% have high or moderate interest in single-family homes for purchase.
- 24% have high or moderate interest in condos for purchase.

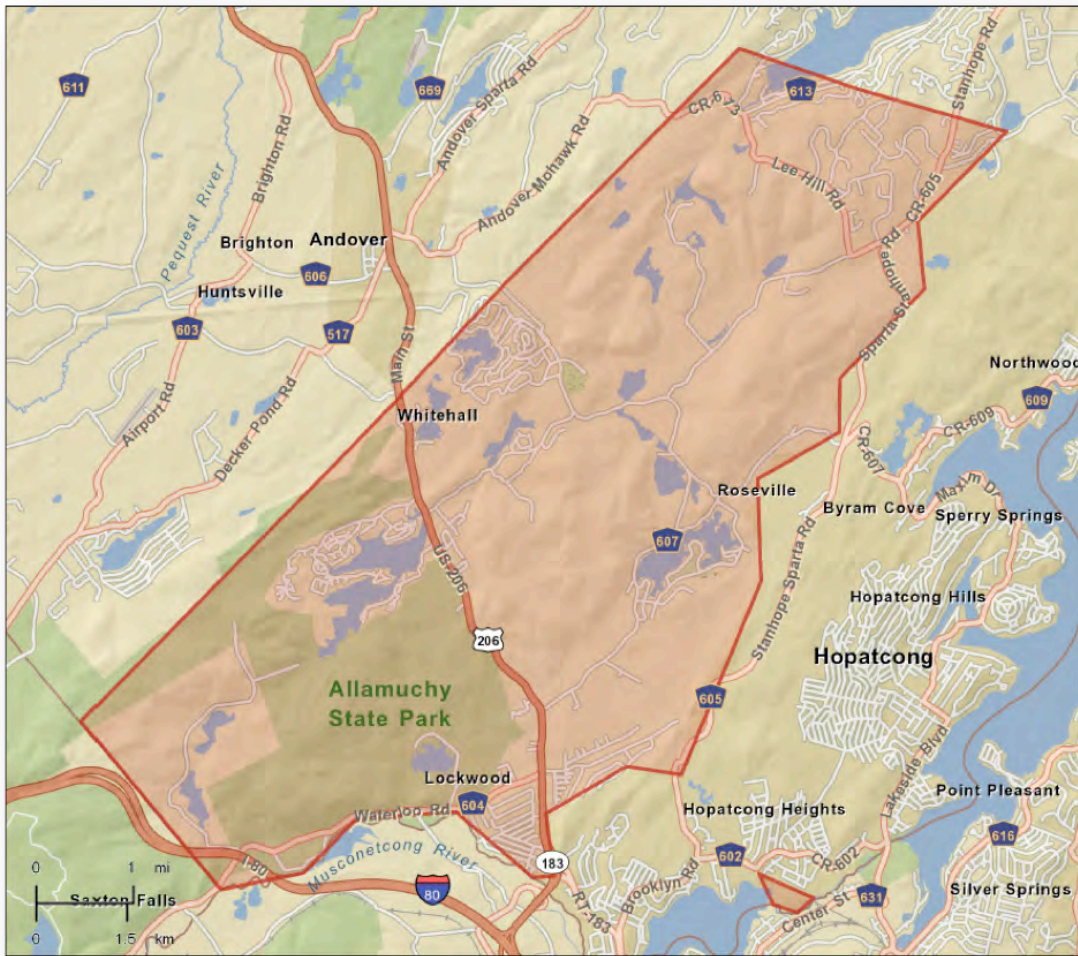
Rental housing choices did not fare as well among respondents:

- Only 17% expressed high or moderate interest in garden apartment for rent.
- Only 16% indicated high or moderate interest in apartments over commercial space.

Multi-family home was the least desired housing option, with only 10% of all respondents expressing high or moderate interest.

Trade area:

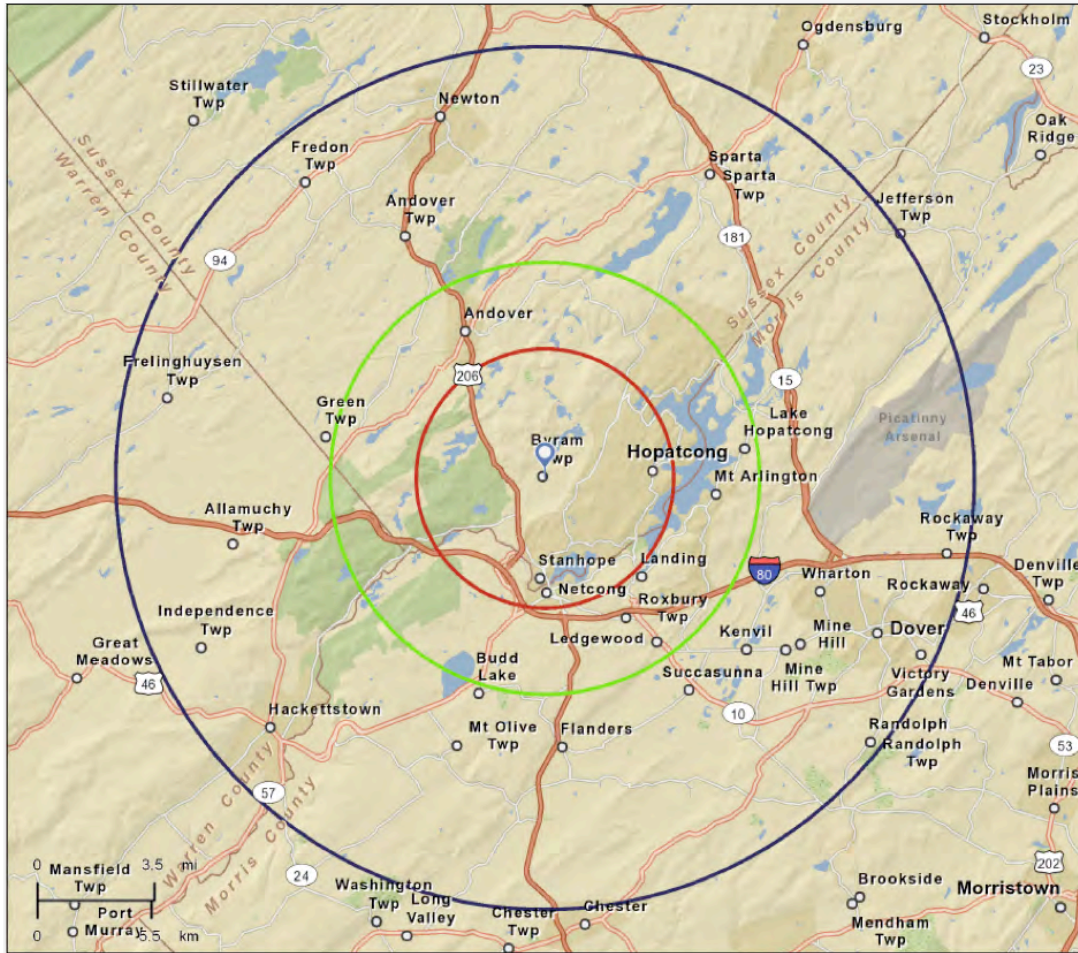
From the survey results, we know that Byram's primary trade area is Byram Township itself. (The survey was advertised to all visitors to Byram's business district, and 86% of the survey respondents were Byram residents.) Very few of Byram's shoppers come from outside of town.



Byram's primary trade area

This shows us why many retailers in Byram are struggling: they are drawing sales from too small of an audience. There are only 8,240 residents of Byram, and they spend \$169 million/year—less than half of that on stores in Byram—for retail goods and services. For businesses to flourish in town, they need to attract the business of outside visitors. If the

district were to become a home to destination businesses that could attract outside visitors, the Township could reasonably expect to grow its trade area to a 20-30 minute drive time area. We believe that it would be possible for Byram to serve a secondary trade area of a 10-mile radius around the community:



This map shows the 3-mile (red line), 5-mile (green line), and 10-mile radii around Byram

The 10-mile radius hosts a population of nearly one-quarter million people that spend \$3.79 billion/year on retail goods and services. If the businesses of Byram could capture just 2% of that spending, it would add more than \$75 million to their annual receipts. That is almost double the \$82.2 million/year that they currently earn in sales.

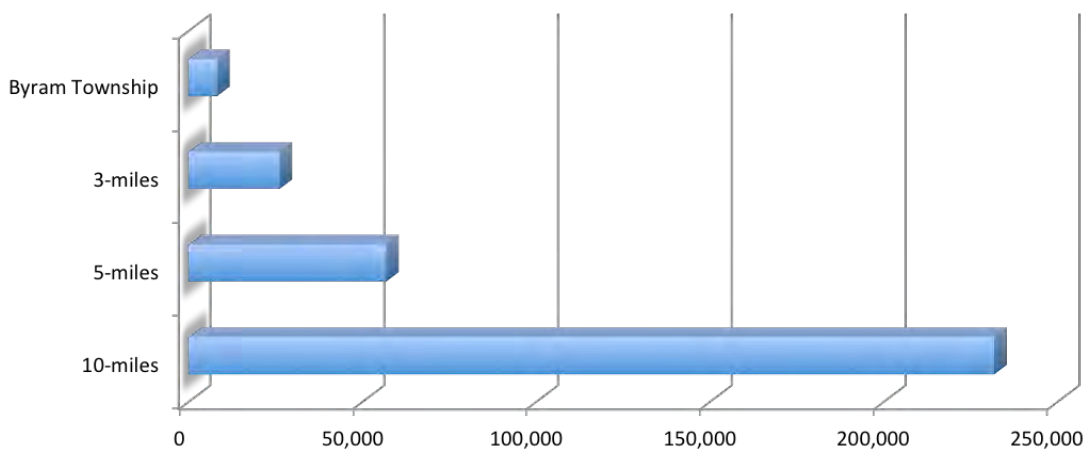
ECONOMIC DATA

We obtained current demographic and economic data for this report from ESRI, an international data subscription service based in California that is widely respected and utilized by the retail industry. ESRI provides GIS-based data; that is, information that is expressly descriptive of a specific geographic area. We solicited data for Byram Township, as well as for the 3-mile, 5-mile, and 10-mile radii surrounding the Township. We did this because it is useful for us to base our analysis on your current (primary) trade area, as well as to project what we believe to be your potential (secondary) trade area. We also did this because many retailers like to see comparative data for that series of radii in a suburban/rural setting. The complete data sets for the Township, and for the three radii, are appended to this report.

Demographics

As already noted, U.S. Census data shows Byram's population to be 8,240 in 2,907 households. This is a small market that is not sufficient to sustain the retail already present in the community, let alone additional new retail.

The wider radii around Byram greatly expand the available consumer population, within a relatively short driving area. At the 3-mile radius, the population triples, to 26,249. At 5-miles it increases to 56,895. At 10-miles, the population is nearly one-quarter million: 231,864. This is strikingly apparent in a bar graph:



Comparative populations of Byram and surrounding radii

We measured Median Disposable Income for each of the areas, and then compared them. We also included the MDI for the State of NJ, which shows that while Byram Twp residents have a much higher MDI than their surrounding radii, it is still \$13,000/year lower than the State average:

\$83,545 Byram Township
\$62,988 3-mile radius
\$64,002 5-mile radius
\$64,963 10-mile radius
\$96,500 New Jersey

While the lower median disposable incomes of the surrounding radii may be disappointing from a retail perspective, the better news is the higher population makes up for that discrepancy—in essence, it’s a smaller slice of a much, much larger pie—so it still represents a good opportunity for Byram merchants.

Next, we examined the psychographics, or lifestyles, of the populations in each area. (ESRI refers to these analyses as their “Tapestry” profiles.) These profiles are useful to sophisticated retailers who are interested in the lifestyles of area consumers when making business-siting locations. The profiles classify resident groups by type, and describe shopping preferences that are supported by each group. ESRI has identified 67 such groups nationwide based on socioeconomic and demographic characteristics, and given each group a descriptive name (i.e., “Laptops & Lattés”).

Byram Township is comprised largely (96%) of four groups:

- 43%-Pleasantville
- 18%-Home Improvement
- 18%-City Lights
- 17%-Savvy Suburbanites

Attached below is the “Pleasantville” description sheet; others are provided in the appendix for “Home Improvement,” “City Lights,” “Savvy Suburbanites,” and “Professional Pride,” which are the primary groups represented within the radii. While we need not go into detail in this report about all of Byram’s Tapestry profiles, suffice it so say that we have identified all of them for Byram Township and the three radii around the Township. The profile references for Byram and all radii are included among the economic data in the appendix of this report, and will be useful for Byram’s retail recruitment campaigns.

“Pleasantville” Tapestry description sheet:



LifeMode Group: Upscale Avenues

Pleasantville

2B

Households: 2,674,000

Average Household Size: 2.86

Median Age: 41.9

Median Household Income: \$85,000

WHO ARE WE?

Prosperous domesticity best describes the settled denizens of *Pleasantville*. Situated principally in older housing in suburban areas in the Northeast (especially in New York and New Jersey) and secondarily in the West (especially in California), these slightly older couples move less than any other market. Many couples have already transitioned to empty nesters; many are still home to adult children. Families own older, single-family homes and maintain their standard of living with dual incomes. These consumers have higher incomes and home values and much higher net worth (Index 400). Older homes require upkeep; home improvement and remodeling projects are a priority—preferably done by contractors. Residents spend their spare time participating in a variety of sports or watching movies. They shop online and in a variety of stores, from upscale to discount, and use the Internet largely for financial purposes.



OUR NEIGHBORHOOD

- Suburban periphery of large metropolitan areas, primarily in Middle Atlantic or Pacific states.
- Most homes owned (and mortgaged) (Index 141).
- Households composed of older married-couple families, more without children under 18, but many with children over 18 years (Index 141).
- Older, single-family homes: two-thirds built before 1970, close to half from 1950 to 1969.
- One of the lowest percentages of vacant housing units at 4.7% (Index 42).
- Suburban households with 1 or 2 vehicles and a longer travel time to work (Index 119).

SOCIOECONOMIC TRAITS

- Education: 64% college educated, 34% with a bachelor's degree or higher.
- Low unemployment at 7.8%; higher labor force participation rate at 67% (Index 107); higher proportion of HHs with 2 or more workers (Index 116).
- Many professionals in finance, information/technology, or management.
- Median household income denotes affluence, with income primarily from salaries, but also from investments (Index 131) or Social Security (Index 108) and retirement income (Index 124).
- Not cost-conscious, these consumers willing to spend more for quality and brands they like.
- Prefer fashion that is classic and timeless as opposed to trendy.
- Use all types of media equally (newspapers, magazines, radio, Internet, TV).

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

Next, we examined overall retail demand (how much residents of each area spend on retail goods and services each year) and overall retail supply (how much the retail businesses in each area are selling each year) for Byram Township, and for each of the three radii. We also obtained data for supply and demand by general retail categories for each area.

Where there is more supply than demand that indicates a surplus supply condition. Surplus usually indicates that there are too many retail stores of a category concentrated in that area, and that there is insufficient demand in that category to support a new retailer. (At times, however, surplus indicates that the area is a destination for retailers in that category. For example, car dealers often cluster in one area, and attract business from consumers from many miles away. On a supply and demand chart, the supply of car dealerships for that town would appear to be in high surplus, because the demand of local residents is not enough to support the level of sales the dealers are making. That does not mean that more car dealerships could not do well.)

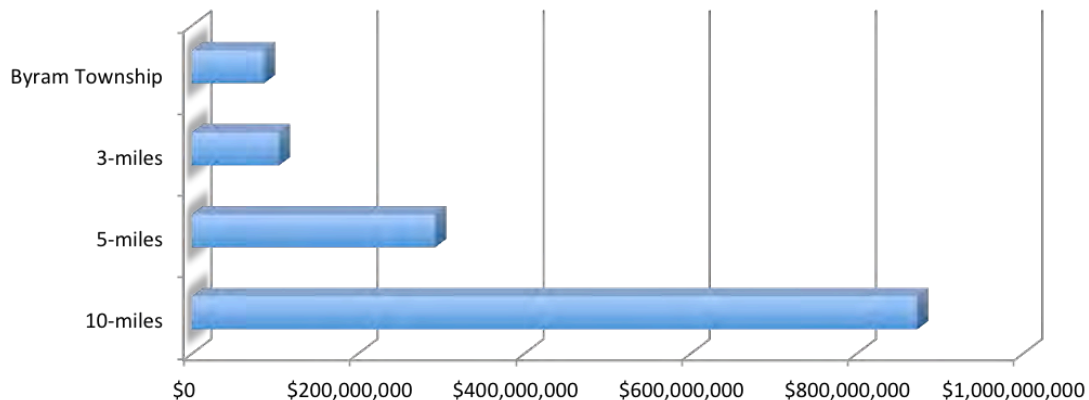
In cases of more demand than supply, that is an indication of a normal condition called “leakage.” Consumer dollars are said to be “leaking” out of the business district because there are not enough sales within the district to satisfy the demand. This often indicates that there is opportunity for more retail stores of that category in that area, (although at times it may instead signal that consumer spending in that category is being satisfied just outside the area measured, often at the regional mall or shopping center).

Here is the overall demand, expressed in millions of dollars, for Byram and its three radii:

- \$169 Byram Twp.
- \$399 3-miles
- \$922 5-miles
- \$3,789 10-miles
- \$2,043 Richmond VA

For comparison's sake, we threw in a data point about the overall demand for the city of Richmond, Virginia—a major market—showing that the 10-mile radius around Byram has nearly double the amount of retail purchasing power than that southern city.

The amount of retail leakage (excess of demand over supply) for all regions looks like this:



Specifically, those leakage numbers are:

- Byram Township:\$87 million
- 3-miles:\$105 million
- 5-miles:\$293 million
- 10-miles:\$ 873 million

Those blue bars represent dollars that are leaking away from Byram's primary and secondary trade areas. Some share of these dollars could and should be captured by Byram's merchants.

If we examine leakage by retail category, we find good opportunities in specifically sustainable categories (ones that are in line with preferences expressed by your consumers in the online survey, that include retailers who could meet your infrastructural requirements, and that would serve as destination businesses attracting visitors from outside of your community). Those categories are full-service restaurants, specialty grocery categories (ethnic/imported foods, fresh/organic/exotic produce, fresh seafood, butchered meats) furniture stores, specialty goods in the general merchandise category (smaller vendors that sell distinctive goods), outdoor recreation-focused sporting goods (that could service eco-

tourism interests of the region), and bakeries⁷. We also examined the home furnishings category, but found that there was insufficient demand in the wider radii to warrant its inclusion:

Retail Category	Unmet demand in millions of dollars at:			
	Byram Twp	3-miles	5-miles	10-miles
Furniture Stores	\$1.3	\$3.5	\$7.9	\$26.6
Home Furnishings	\$1.3	\$3.5	\$2.5	\$5.7
Grocery Stores	\$11.9	\$9.7	\$51.0	\$153.4
Specialty Food Stores	\$0.9	\$2.2	\$4.7	\$35.2
Sporting Goods/Hobby	\$2.7	\$6.1	\$1.8	\$6.7
Other General Merchandise Stores	\$8.4	\$20.0	\$48.3	\$106.6
Full-service restaurants	\$3.2	\$5.4	\$18.7	\$83.4

The black numbers in this chart represent the amount of spending (in millions of dollars) that consumers of an area are spending each year over and above the local supply actually sold in that area—dollars that are leaking, and are available for capture by merchants in Byram.

Where the numbers are red that indicates the amount that retail supply in that area exceeds consumer demand of the residents. You will note that the Home Furnishings (decorator items for the home, and some housewares/small appliances) category shows promise in Byram, and at the 3-mile radius, but then at the 5-mile and 10-mile radii, supply exceeds demand dramatically. These numbers would make it difficult to recruit a retailer in that category.

Over-supply in other categories, such as specialty food stores, sporting goods, and other general merchandise are not as concerning, as the wide variation that is possible within these

⁷ Note: Our supply and demand data shows that there are additional categories with significant unmet demand in both Byram and across all three radii around it; however, we did not include those categories in this discussion because they did not match community preferences. For example, the Auto Parts/Accessories/Tire Store category has such unmet demand, but stores of this category would not meet community goals for destination retail that is walkable and browse-shoppable.



categories create opportunities for small retailers to pursue niches of product that are not in direct competition with national or regional retailers in the wider radii.

Finally, we examined the economic data to find where the retail opportunities coincided with Byram's infrastructural characteristics, and community preferences. We compiled a set of strategic goals, and five major recommendations. In addition, we created a work plan with specific tasks that will allow the community to implement the recommendations, and proposed a conservative budget with which to fund those activities. Those recommendations and plans follow in the final section of this report.

CONCLUSIONS AND RECOMMENDATIONS; STRATEGIC PLAN GOALS:

We draw five major conclusions from our analysis of the infrastructure, community opinions, and economic data for Byram:

- 1. Retail growth is difficult, but possible: There is some unmet demand for shopping & dining in Byram, but there is much more unmet demand in the 10-mile radius around Byram. However, not all retail will work here; to attract visitors from the wider radius, Byram's commerce must be distinctive destination retail. Also, Byram must proactively recruit retailers.**
 - Byram residents spend \$169,231,343/yr on retail goods and services
 - More than half of that: \$87,020,318 leaks out of Byram each year to be spent on retail goods elsewhere.
 - Those residents have told us that they would shop and dine here more often if we provided more of what they want. Targeted retail recruitment will allow us to better meet their needs.
 - But the wider 10-mile radius around Byram offers much greater opportunity.
 - There are 30 times as many households (85,623) as in Byram (2,907);
 - There is 22 times more spending (\$3.78 Billion) on retail goods and services as in Byram (\$169 million).
 - However, the shoppers of the wider area are unfamiliar with shopping/dining opportunities in Byram, and no one is telling them about it.
 - More importantly, Byram today does not represent a shopping destination that would draw them. Strategic development will provide the new retail locations suitable for new retailers, and targeted retail recruitment will help us to fill commercial spaces with more of those destination businesses. Once those businesses are in place, Byram can begin attracting visitors from the 10-mile radius.
- 2. Eco-tourism is central to Byram's distinction. The Township is both advantaged and restricted by highlands preservation; we should utilize the advantages.**



Outdoor recreation features attract visitors, and provide an opportunity for distinctive retail to be supported, in a setting that is appealing and distinctive.

Byram is surrounded by public parks that attract visitors for hiking, fishing, swimming, boating, kayaking, horseback riding, and more; in fact, 1.2 mm visit State Parks in the Highlands each year, many of which are in or near Byram:

- Allamuchy State Park
- Kittatinny Valley State Park
- Hacklebarney State Park
- Stephens State Park
- Waterloo Village
- Public lakes in Byram

There are also several private attractions in town, and more in the region:

- Wild West City
- Tomahawk Lake Water Park

These outdoor recreational attractions offer Byram at least three opportunities for retail business growth:

- Byram could attract retail businesses that cater to eco-tourism audiences;
- Byram could market its businesses directly to the eco-tourism population, particularly through cooperative marketing with the public and private attraction managers;
- Byram could develop events designed to appeal directly to eco-tourists that would bring them to your commercial center during peak times of their annual visits.

3. Housing growth is possible: There is demand for housing types not now available in Byram Township. Additional housing in Byram would add \$58,235

per HH in retail demand per year. 150 new homes = \$8.7 million new retail spending/year.

Byram's consumer preferences survey confirmed that your residents recognize that apart from single-family homes, there are few other housing types available for buyers and renters in need of other options. It also documented that your residents have interest in small apartments, starter homes for young people, and housing for empty-nesters. The community also expressed that there is not enough affordable housing for those who need it in Byram.

- 4. The commercial infrastructural orientation is highway/auto-based. Opportunities exist to create a walkable commercial district through new development; this would require a dedicated recruitment effort for developers/retailers; support of property owners; appropriate zoning; and possibly government incentives.**

A walkable shopping environment is desired by Byram residents, but not currently available. Moreover, it's impractical to create a destination shopping environment in which each store must be reached individually by car.

- Most businesses are on Rte 206, reachable only by car;
- Most have on-site parking;
- Most are set-back from curb;
- Most are isolated from others;
- Not practical for shoppers to walk, or to visit more than 1 store.

New mixed-use development could resolve these problems:

- The Village Center site is zoned for mixed-use development;
- Several vacant lots along Rte 206 could be developed;
- New development could inter-connect mixed-use retail served by common parking;

- Augmenting with a system of trails with connections to retail goods and services locations in tandem with site design related to commercial development;
- If necessary, remote parking could be used with shuttle conveyance.

5. Destination marketing is needed to support commerce in Byram.

For commerce to survive and thrive in Byram, outside visitors must be induced to shop and dine there. Attracting new businesses alone won't bring the shoppers; marketing must be used to do this:

- Byram could attract visitors with events—and create a public event space adjacent to businesses;
- Byram could support businesses with retention programs;
- Byram could recruit new businesses that would stimulate more shopping and dining visits;
- With new businesses in place, Byram could brand and market the community as a destination to visitors.

Consistent with those recommendations, we propose the following goals for your strategic plan:

1. Recruit new retailers in sustainable categories that:
 - a. Fit your infrastructural options,
 - b. Take advantage of local eco-tourism, and
 - c. Increase destination businesses in Byram;
2. Generate trial visits from people within the 10-mile radius;
3. Take action to retain existing businesses;
4. Market Byram's business district as a destination; and
5. Develop a source of revenue that will support these activities.



We propose a plan of action with tasks that will allow you to pursue these goals, with the tasks specified by month over the period of the upcoming year. We also propose an initial, modest budget that presumes that volunteer staff will take on the heavy task load, allowing dollars to be reserved for services that cannot be volunteered, such as the costs of printing and mailing marketing materials. (The Work Plan Calendar, and Work Plan Budget are appended to this report.)

Within a few years, new development can be instituted, and new retailers/restaurants attracted that will forge a better retail mix, in an environment that will be compelling to residents and outside visitors.

Ultimately, we encourage Byram Township to go beyond this initial modest budget, and take on a very proactive, deliberate role in managing its retail mix, staging attractive events, and promoting its business district as a shopping/dining destination to the wider region.



APPENDIX

A. Survey questions



TOWNSHIP OF BYRAM Market Analysis Report



PO Box 1148
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Merchantville, NJ 08109
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JGSCgroup.com

BYRAM TOWNSHIP, NJ RECOMMENDED SURVEY QUESTIONS Second Draft: September 3, 2015

These are the questions we are recommending for the consumer survey, which we propose to launch by September 14, 2015. This is NOT the final layout of the survey, and the questions may not follow in this exact order. Once the questions are approved, the online survey will be programmed and you will have an opportunity to test it before it goes live at www.ByramSurvey.com.

The launch page will be branded with the Township logo and will provide a brief description of the purpose of the survey, asking all who live, work, shop, dine or visit Byram to participate. Draft language for the launch page is attached for your review at the end of these questions.

1. What is your home ZIP code? [We will provide radio buttons for 07821 as well as 07843; 07871; 07874; and "other".]
2. How long have you lived in your current ZIP code?
 - a. Less than 1 year
 - b. 1 to 5 years
 - c. 5 to 10 years
 - d. Longer than 10 years
3. [Branching question if (a) through (c) above is selected:] What was your previous home ZIP code? [Open ended]
4. What is your gender? [Radio buttons]
5. Which of the following best describes your age group? [Radio buttons]
 - a. Under 18
 - b. 18 to 24
 - c. 25 to 34
 - d. 35 to 44
 - e. 45 to 54
 - f. 55 to 64
 - g. 65 or older
6. How many persons (INCLUDING yourself) reside in your household?
 - a. Adults (age 18 and older) [Radio buttons: 1, 2, 3, 4, 5, 6 or more]
 - b. Children (under age 18) [Radio buttons: 1, 2, 3, 4, 5, 6 or more]
7. Byram Township is working on initiatives aimed at making Byram a more appealing place to live, shop, dine, and visit. Please rate the importance of accomplishing the following: [Very Important; Somewhat Important; Not Important]
 - a. Actively pursue revitalization of storefronts and building façades
 - b. Attract new retail businesses
 - c. Attract more restaurants and eating places
 - d. Attract more professional offices—particularly medical professionals
 - e. Attract more outdoor recreational attractions ("eco-tourism")
 - f. Focus efforts on retaining existing businesses
 - g. Pursue redevelopment to create new housing and retail space
 - h. Attract more shoppers
 - i. Improve streetscapes (trees, planters, benches, etc.)
 - j. Improve pedestrian crosswalks and traffic control



TOWNSHIP OF BYRAM Market Analysis Report



BYRAM TOWNSHIP, NJ
Recommended Survey Questions

- k. Provide more public parking spaces
 - l. Market Byram to attract more visitors here
- 8. During a typical MONTH, about how many times do you...
 - a. Dine at restaurants or eating places in Byram?
 - b. Dine at restaurants or eating places other than in Byram?
 - c. Shop at stores (EXCLUDE grocery shopping) in Byram?
 - d. Shop in all other areas (EXCLUDE internet purchases and grocery shopping)
- 9. When dining out, about how much do you typically spend (per person/per outing) when dining in Byram? How about when dining in all other locations?
- 10. When shopping in Byram (other than for groceries), about how much do you normally spend per shopping outing? How about when shopping at other locations? (EXCLUDING grocery and internet purchases.)
- 11. About how often do you shop at the following? [Radio buttons: Once a week or more; Several times a month; About once a month; Less than once a month; Not at all]
 - a. Ledgewood Mall
 - b. Roxbury Mall
 - c. Itc Crossing Shopping Centers (north & south)
 - d. Village Green Shopping Center
 - e. Hackettstown Mall
 - f. Sutton Plaza Shopping Center
 - g. Sussex County Mall, Newton
 - h. Olde Lafayette Village
 - i. Others?
- 12. What are the MAIN reasons that you DO NOT shop and/or dine in Byram more often? [Checkboxes]
 - a. Too few stores / shops
 - b. Poor selection of restaurants / eating places
 - c. Selection or quality of merchandise is poor
 - d. Doesn't have the stores I like
 - e. Parking
 - f. Traffic congestion
 - g. Store hours are uncertain / inconvenient
 - h. My time/schedule
 - i. Other (specify)
- 13. When you drive to the stores, restaurants, and businesses in Byram is adequate parking available? [Radio buttons]
 - a. Always
 - b. Usually
 - c. Sometimes
 - d. Rarely
 - e. Never
- 14. Would you shop and/or dine in Byram more often if it offered more of the following? [Matrix: Yes; No; Possibly]

a. Full service (table service) restaurants	c. Limited service (counter service) eating places
b. Kid-friendly restaurants	d. Sporting goods
	e. Crafts and hobbies
	f. Clothing – women's



TOWNSHIP OF BYRAM Market Analysis Report



BYRAM TOWNSHIP, NJ
Recommended Survey Questions

- | | |
|--|---|
| g. Clothing – men's | r. Unique home décor and decorating boutiques |
| h. Clothing – children's | s. Antiques / vintage boutiques |
| i. Shoes | t. Consignment shops |
| j. Uniforms / work wear | u. Bicycle shop |
| k. Specialty / gourmet food store | v. Furniture and appliances |
| l. Baked goods | w. Mattresses / beds / futons |
| m. Fresh produce | x. Office supplies |
| n. Meats, poultry, butcher | y. Upscale paint and wallpaper store |
| o. Seafood, fish | z. Interior design / decorators |
| p. Wine and spirits store | aa. Kitchen and bath design |
| q. Housewares / home goods / household furnishings | bb. Pharmacy |
| | cc. Doctor |
| | dd. Dentist |
| | ee. Eye care |

15. Please name a specific restaurant or type of eating place that you would like to have in Byram. [Open-ended]
16. Please name a specific store or type of retail that you would like to have in Byram. [Open-ended]
17. Are you adequately served, or would you like to see more medical professional offices (doctors, dentists, eye care, and other specialists) in Byram?
18. Thinking of children and teens in Byram, what type of entertainment, activities, or events should we offer? [Open-ended]
19. Please name a type of entertainment or recreation (other than those for children/teens) that you would like offered in Byram. [Open-ended]
20. Other than stores, professional services, restaurants or entertainment, what other changes would make Byram more appealing? [Open-ended]
21. Please rate Byram's commerce on or near Route 206 in each of the following categories as Good; Fair; or Poor
 - a. Overall appearance
 - b. Variety of businesses
 - c. Quality of merchandise/products/services
 - d. Selection and quality of eating places
 - e. Convenient parking
 - f. Smoothness of traffic flow
 - g. Cleanliness of streets, sidewalks, parking areas
 - h. Comfortable places to sit
 - i. Safety during the evening
 - j. Clear directional signage
22. Do you rent or own your current home? [Radio buttons]
23. Please tell us how you feel about the following statements [Radio buttons: Agree; Disagree: No Opinion]:
 - a. Byram offers adequate housing options for young couples seeking a starter home.
 - b. Byram offers adequate housing options for established residents who want to move into larger homes.



TOWNSHIP OF BYRAM Market Analysis Report



BYRAM TOWNSHIP, NJ
Recommended Survey Questions

- c. Byram offers adequate housing options for "empty nesters" seeking apartments, or "above age-55" and assisted-living housing.
- d. Byram offers adequate affordable housing choices.

Highlands Council rules significantly restrict new development in most of Byram Township. The Village Center zone at Lackawanna Avenue and Route 206 would allow development of new commercial space for retail, and/or office use. It would also allow for development of up to 125 units of new housing, clustered together to preserve green space on the site. The next two questions concern the possible development of that zone.

24. Which one of the following types of commercial development would you favor for the Village Center?

- a. A shopping center with national or regional brand stores (for example, "Target," "Burlington Coat Factory," "Eastern Mountain Sports" or similar major brand business).
- b. A walkable shopping village destination, with distinctive shops and restaurants intended to attract residents and outside visitors (for example, a bicycle shop, a bakery, a full-service ethnic restaurant, or similar destination business).
- c. A small group of stores with businesses intended to serve just the needs of local residents (for example, a convenience store, a barber shop, a dry cleaner, or similar neighborhood business).
- d. A professional office center, (for example, medical offices).
- e. No commercial development.

25. Would you have interest now, or in the near future in any one of the following types of housing being considered for the Village Center?

- a. Townhome for purchase.
- b. Single family home for purchase.
- c. 2 to 4-unit condominium for purchase.
- d. Garden apartment for rent.
- e. Apartments for rent above commercial space.
- f. Other: (describe) _____.
- g. None of the above.

26. Please rate the importance [as: Very Important; Somewhat Important; Not Important] of the following when making your decision to purchase or rent a home:

- a. Proximity to highways
- b. Quality and price of housing
- c. Convenient access to public transportation
- d. Planned future development projects
- e. Nearby entertainment and recreation options
- f. Selection of shopping and dining nearby
- g. Walkable downtown
- h. Public school system
- i. Outdoor recreational activities
- j. Other important influence (specify):

27. Which of the following best represents your ANNUAL HOUSEHOLD income? [Radio buttons]



TOWNSHIP OF BYRAM Market Analysis Report



BYRAM TOWNSHIP, NJ
Recommended Survey Questions

- a. Less than \$25,000 per year
- b. \$25,000 to \$34,999 per year
- c. \$35,000 to \$49,999 per year
- d. \$50,000 to \$74,999 per year
- e. \$75,000 to \$99,999 per year
- f. \$100,000 to \$149,999 per year
- g. \$150,000 to \$199,999 per year
- h. \$200,000 to \$249,999 per year
- i. \$250,000 or more per year

28. How did you learn of the survey?

- a. Letter mailed to my house
- b. Lawn sign
- c. Flyer
- d. Email message
- e. Phone message
- f. Saw a link to it on a website
- g. Newspaper story
- h. Radio announcement
- i. Other

END OF SURVEY



TOWNSHIP OF BYRAM Market Analysis Report



BYRAM TOWNSHIP, NJ
Recommended Survey Questions

Draft language for the launch page of the survey, to be branded with the community's logo.

The following is the proposed text for the launch page prior to going live:

THE BYRAM SURVEY IS COMING SOON!

Byram Township's Mayor and Council are working to make Byram a more desirable place to live, shop, dine, and socialize. As part of our efforts, we'll be conducting a survey to learn what kinds of stores, restaurants, and other changes would make shopping and dining here more appealing to you, and what housing choices you might have interest in for development in our town.

The survey will launch here on September 14th, so please check back soon. If you would like us to send you an email when the survey goes live, please provide your email address below.

Email: _____

We look forward to your participation in our survey!

The following is the proposed text for the launch once it is live:

Welcome to the Byram Township survey!

Byram Township's Mayor and Council are working to make Byram a more desirable place to live, shop, dine, and socialize. As part of our efforts, we are conducting this survey to learn what kinds of stores, restaurants, and other changes would make shopping and dining here more appealing to you. We also want to hear your opinions about housing choices here.

Whether you live in, work in, or just visit Byram Township, we want to hear from you! The survey is anonymous—you will NOT be asked to provide any personal contact information.

It should take you about 12 minutes to complete the survey. Once you leave the survey site you will not be allowed re-entry, so please make sure you'll have enough time to finish the survey before continuing. When you're ready to begin, click "go to survey".

Thank you for your interest in the future of Byram!

[Go to Survey Button]



APPENDIX

B. Survey responses



TOWNSHIP OF BYRAM Market Analysis Report



Byram Township Consumer Survey Results

Completed Surveys	Count	Margin
All Responses	1,415	2.7%
Byram Resident	1,213	2.9%
Non-resident	202	7.0%

	All (1,415)	Residents (1,213)	Non-Residents (202)
Q1 Are you a resident of Byram			
Yes	86%	100%	0%
No	14%	0%	100%

	All (1,410)	Residents (1,210)	Non-Residents (196)
Q2 Home Zip Code			
07821 - Andover	45%	50%	8%
07871 - Sparta	12%	13%	5%
07874 - Stanhope	33%	36%	13%
All other zip codes	11%	0%	74%

	All (1,407)	Residents (1,209)	Non-Residents (194)
Q3 How long have you lived in your current zip?			
Less than 1 year	3%	2%	7%
1 year to 5 years	13%	12%	20%
5 years to 10 years	14%	14%	16%
Longer than 10 years	69%	71%	57%

	All (1,410)	Residents (333)	Non-Residents (80)
Q4 Previous Home Zip Code			
07821 - Andover	9%	6%	23%
07840 - Hackettstown	5%	5%	4%
07871 - Sparta	5%	5%	4%
07874 - Stanhope	14%	13%	21%

	All (1,333)	Residents (1,162)	Non-Residents (167)
Q5 Please rate the importance of accomplishing the following... (% saying "Very Important")			
Focus on retaining existing businesses	74%	73%	77%
Attract more restaurants and eating places	65%	64%	73%
Attract new retail businesses	62%	63%	60%
Actively revitalize storefronts and building facades	54%	54%	53%
Attract recreational ("eco-tourism")	50%	48%	63%
Improve streetscapes	49%	49%	49%
Improve crosswalks and traffic control	38%	37%	43%
Attract more shoppers	37%	36%	39%
Market Byram to attract more visitors	34%	33%	42%
Attract more professional offices, particularly medical	30%	31%	20%
Pursue redevelopment for housing & retail space	28%	27%	30%
Provide more parking spaces	12%	10%	25%

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TOWNSHIP OF BYRAM Market Analysis Report



Byram Township Consumer Survey Results

	All (1,333)	Residents (1,161)	Non-Residents (168)
Q6 Make no changes. Byram is fine as it is.			
Agree	13%	12%	18%
Disagree	87%	88%	82%

	All (1,341)	Residents (1,168)	Non-Residents (169)
Q7. When you drive to the stores, restaurants and businesses, is there adequate parking?			
Always	36%	37%	31%
Usually	53%	53%	54%
Sometimes	10%	9%	14%
Rarely	1%	1%	1%
Never	0%	0%	0%

	All (1,317)	Residents (1,152)	Non-Residents (161)
Q8 / Q9 Would you shop and/or dine in Byram more often if it offered more... (% saying "Yes")			
Full-service restaurants	70%	70%	72%
Fresh produce market	68%	68%	69%
Meats, poultry, butcher	57%	57%	58%
Specialty / gourmet food store	52%	51%	55%
Seafood, fish market	51%	51%	52%
Baked goods	50%	50%	50%
Clothing stores for women	37%	37%	33%
Shoe stores	35%	36%	31%
Child-friendly restaurants	34%	34%	27%
Wine and spirits shop	33%	34%	38%
Clothing stores for men	31%	31%	28%
Clothing stores for children	27%	28%	19%
Limited-service eating places	24%	25%	21%
Housewares / home goods / home furnishings	43%	43%	38%
Unique home décor / decorating boutiques	35%	35%	34%
Doctor / medical offices	28%	30%	15%
Pharmacy	26%	27%	18%
Dental offices	25%	26%	18%
Antiques / vintage boutiques	24%	24%	31%
Upscale consignment shops	24%	24%	29%
Eye care services	24%	25%	18%
Furniture and appliances	21%	22%	12%
Office supplies	21%	22%	16%
Bicycle shop	20%	19%	23%
Interior design / decorators	15%	15%	10%
Kitchen / bath design	12%	13%	7%

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TOWNSHIP OF BYRAM Market Analysis Report



Byram Township Consumer Survey Results

Q10-17 Averages for shopping & dining visits and spending	All (1,298)	Residents (1138)	Non-Residents (156)
Q10 Dining visits/mo in Byram	2.9	2.9	2.5
Q12 Dining visits/mo elsewhere	5.0	4.9	5.5
Q10 Never dine in Byram	16%	16%	21%
Q11 Avg. \$ dining pp/visit in Byram	\$19.11	\$18.97	\$20.32
Q13 Avg. \$ dining pp/visit elsewhere	\$25.24	\$25.16	\$25.99
Q14 Shopping visits/mo in Byram	2.3	2.4	1.7
Q16 Shopping visits/mo elsewhere	6.7	6.8	6.3
Q14 Never shop in Byram	36%	34%	48%
Q15 Avg. \$ shopping/visit in Byram	\$22.34	\$22.89	\$18.46
Q17 Avg. \$ shopping/visit elsewhere	\$70.82	\$72.30	\$60.96

Q18 Main reason you do not visit more often.	All (1,259)	Residents (1,106)	Non-Residents (149)
Limited offering of stores / shops	72%	74%	60%
Limited selection of restaurants / eating places	67%	69%	54%
Doesn't have the stores I like	57%	59%	44%
Selection or quality of merchandise offered	34%	35%	25%
My time / schedule	11%	10%	13%
Store hours are uncertain / inconvenient	5%	5%	7%
Traffic congestion	4%	2%	15%
Parking	2%	1%	3%
Other	11%	10%	18%

Q19 How often do you shop at the following locations (% "weekly & several times a month")	All (1,258)	Residents (1,105)	Non-Residents (149)
Ledgewood Mall	20%	20%	16%
Roxbury Mall	25%	25%	23%
ITC Crossing (north and south)	72%	76%	42%
Village Green shopping center	6%	7%	2%
Hackettstown Mall	3%	2%	5%
Sutton Plaza shopping center	1%	1%	2%
Sussex County Mall, Newton	15%	13%	26%
Sparta / Lake Mohawk	16%	18%	8%
Rockaway Mall	33%	35%	22%

Q19 How often do you shop at the following locations (% "less than 1x a month & not at all")	All (1,258)	Residents (1,105)	Non-Residents (149)
Ledgewood Mall	58%	58%	62%
Roxbury Mall	51%	50%	61%
ITC Crossing (north and south)	14%	10%	41%
Village Green shopping center	80%	80%	79%
Hackettstown Mall	91%	91%	90%
Sutton Plaza shopping center	96%	96%	96%
Sussex County Mall, Newton	72%	73%	65%
Sparta / Lake Mohawk	71%	70%	83%
Rockaway Mall	37%	35%	52%

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TOWNSHIP OF BYRAM

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Byram Township Consumer Survey Results

Q20 Name a restaurant or type of eating place you would like to see in Byram	All (1,073)	Residents (949)	Non-Residents (121)
Italian	7%	7%	7%
Diner	6%	5%	6%
Panera Bread	6%	6%	2%
Mexican	5%	4%	5%
Starbucks	4%	4%	5%
Chipolte	3%	3%	7%
Applebees	3%	3%	
Steakhouse	3%	3%	2%
Olive Garden	3%	2%	4%
Seafood	3%	3%	

Q21 Name a store or type of business you would like to see in Byram	All (1,020)	Residents (903)	Non-Residents (114)
Target	12%	12%	11%
Trader Joes	8%	8%	8%
Clothing stores	7%	7%	5%
Kohl's	5%	5%	5%
Walmart	5%	5%	4%
Hardware store	4%	4%	2%
Home Depot	4%	4%	3%
Lowes	3%	4%	
Sporting goods	3%	4%	
Marshalls	2%	2%	

Q22 Are residents adequately served, or do they need more medical professional offices?	All (1,192)	Residents (1,062)	Non-Residents (126)
We have sufficient medical services	54%	53%	62%
We need more medical services	46%	47%	38%

Q23 What type of entertainment, activities or events should be available for kids in Byram?	All (877)	Residents (787)	Non-Residents (88)
Movies	27%	26%	35%
Parks	10%	10%	15%
Sports programs	9%	9%	5%
Teen center	4%	4%	3%
Playing fields	4%	4%	2%
Music	3%	3%	2%
Recreation center	5%	4%	5%
Mini golf	2%	2%	3%
YMCA	2%		2%
Roller rink	2%	2%	2%

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TOWNSHIP OF BYRAM

Market Analysis Report



Byram Township Consumer Survey Results

Q24 Other than for kids, what entertainment, activities or events should be available in Byram?	All (788)	Residents (698)	Non-Residents (87)
Movies	25%	24%	31%
Concerts	7%	8%	5%
Parks	7%	7%	6%
Bowling	6%	5%	10%
Music	5%	5%	8%
Pool	4%	5%	
Golf	3%	3%	
YMCA	2%	2%	
Hiking trails	2%		6%

Q25 What other changes would make Byram more appealing?	All (916)	Residents (823)	Non-Residents (91)
Lower taxes	9%	9%	
More / better stores	8%	8%	10%
Landscaping	5%	6%	
Sidewalks	4%	4%	

Q26 Rate our commerce on or near Route 206 in each of the categories (% saying "good")	All (1,095)	Residents (967)	Non-Residents (124)
Overall appearance	20%	20%	24%
Variety of businesses	8%	7%	8%
Quality of merchandise / selection	17%	16%	25%
Selection of eating places	8%	8%	7%
Convenient parking	53%	53%	52%
Smoothness of traffic flow	45%	47%	30%
Cleanliness of streets, sidewalks, etc.	38%	37%	48%
Comfortable places to sit	11%	11%	9%
Safety during the evening	55%	56%	50%
Clear directional signage	49%	50%	47%

Q26 Rate our commerce on or near Route 206 in each of the categories (% saying "poor")	All (1,095)	Residents (967)	Non-Residents (124)
Overall appearance	30%	32%	19%
Variety of businesses	47%	48%	39%
Quality of merchandise / selection	26%	26%	18%
Selection of eating places	49%	50%	38%
Convenient parking	4%	4%	5%
Smoothness of traffic flow	10%	9%	24%
Cleanliness of streets, sidewalks, etc.	19%	20%	12%
Comfortable places to sit	52%	53%	44%
Safety during the evening	6%	7%	6%
Clear directional signage	9%	9%	9%



TOWNSHIP OF BYRAM

Market Analysis Report



Byram Township Consumer Survey Results

Q27 Please tell us how you feel about the following statements (% agree)	All (1,178)	Residents 1,042	Non-Residents (132)
Byram provides adequate housing for young people	24%	25%	14%
Byram provides adequate move-up housing options	61%	63%	41%
Byram provides adequate housing for empty nesters	8%	8%	8%
Byram provides adequate affordable housing options	31%	32%	20%

Q27 Please tell us how you feel about the following statements (% disagree)	All (1,178)	Residents 1,026	Non-Residents (128)
Byram provides adequate housing for young people	44%	45%	37%
Byram provides adequate move-up housing options	16%	16%	16%
Byram provides adequate housing for empty nesters	63%	65%	48%
Byram provides adequate affordable housing options	39%	40%	33%

Q28 Rate the following when deciding to rent or purchase a home (% saying "very important")	All (1,158)	Residents 1,026	Non-Residents (128)
Proximity to highways	50%	50%	49%
Quality and price of housing	89%	89%	89%
Access to public transit	31%	31%	33%
Planned future development	38%	38%	42%
Nearby entertainment / recreation	48%	49%	40%
Nearby shopping / dining	49%	50%	46%
Walkable downtown	31%	31%	32%
Public schools	74%	75%	66%
Outdoor recreation activities	53%	53%	52%

Q29 The appeal of commercial development for the Village Center (% saying "very appealing")	All (1,152)	Residents (1,021)	Non-Residents (127)
Shopping center with national retailers	41%	42%	37%
A walkable village with distinctive shops/restaurants	63%	63%	62%
Small group of stores to serve everyday retail needs	36%	36%	38%
Professional and/or medical offices	19%	19%	20%
No commercial development	20%	20%	24%

Q29 The appeal of commercial development for the Village Center (% saying "not appealing")	All (1,152)	Residents (1,021)	Non-Residents (127)
Shopping center with national retailers	34%	34%	31%
A walkable village with distinctive shops/restaurants	12%	13%	8%
Small group of stores to serve everyday retail needs	27%	28%	18%
Professional and/or medical offices	37%	37%	41%
No commercial development	52%	52%	46%

Q30 Have any interest in the following types of housing? (% "High or Moderate Interest")	All (1,149)	Residents (1,019)	Non-Residents (126)
Townhouse for purchase	30%	31%	27%
Single family home for purchase	29%	28%	34%
Multi-family home for purchase	10%	11%	6%
Condo for purchase	24%	24%	23%
Garden apartment for rent	17%	17%	18%
Apartments over commercial space	16%	16%	17%

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TOWNSHIP OF BYRAM

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Byram Township Consumer Survey Results

	All	Residents	Non-Residents
Q31 Respondent Gender	(1,152)	(1,018)	(130)
Female	61%	60%	65%
Male	39%	40%	35%

	All	Residents	Non-Residents
Q32 Household Adults/Children	(1,148)	(908)	(129)
# Adults	2.44	2.47	2.20
# Children	1.21	1.26	0.85

	All	Residents	Non-Residents
Q32 Respondent Age	(1,134)	(907)	(128)
Under 18	1%	1%	0
18 to 24	3%	3%	3%
25 to 34	14%	13%	23%
35 to 44	25%	25%	23%
45 to 54	27%	28%	22%
55 to 64	18%	18%	18%
65 or older	12%	12%	10%
Average age	47.3 yrs	47.5 yrs	45.5 yrs

	All	Residents	Non-Residents
Q33 Respondent Income	(1,029)	(838)	(120)
Less than \$25,000 per year	2%	2%	3%
\$25,000 to \$34,999 per year	3%	3%	3%
\$35,000 to \$49,999 per year	6%	5%	8%
\$50,000 to \$74,999 per year	11%	10%	17%
\$75,000 to \$99,999 per year	14%	16%	15%
\$100,000 to \$149,999 per year	33%	33%	31%
\$150,000 to \$199,999 per year	17%	17%	16%
\$200,000 to \$249,999 per year	7%	7%	5%
\$250,000 or more per year	6%	7%	3%
Average Household Income	\$129,805	\$131,663	\$115,791



APPENDIX

C. Summary of merchant interviews

JGSC interviewed the owners or managers of fifteen businesses⁸ in the Township:

- Byram Diner
- Byram Jewelers
- Cones By Design
- Frogmore
- GNC
- Hafner Laboratories, Inc.
- Halulu Restaurant
- Nissan
- Nutrition Zone
- Pro Plaza 206/Khanna Financial Advisors
- Re-Designs Thrift Shoppe
- Realty Executives
- Salt Gastropub
- ShopRite
- The Trout & The Troll Restaurant

Our questions were intended to provide information about their perception of the way things work in the local retail economy, why they chose to do business in Byram, where their customers come from, how they market their business, and what they consider the obstacles to the growth of business here. Some of those questions were asked to help JGSC formulate a better understanding of the nature of the retail market in Byram (whether it primarily serves residents or attracts visitors), while others were asked to learn what if any contrast there might be between old, established businesses and newcomers, or merchants that rent and those who own, or different impressions among vendor of goods, vendors of services, and restaurateurs.

⁸ We sought to interview about three-dozen different business operators; only the operators of these 15 would consent to talk with us.

Equally important, we asked merchants about their feeling regarding new measures to grow business, such as hosting events to attract visitors, maintaining and sharing customer database information, and cooperative marketing with other merchants. Finally, we asked what they thought are obstacles to their business, and what local government might do to alleviate those obstacles.

Note: All of the interview responses were given to JGSC in confidence, so the information presented here is in paraphrased summary format only; none of the comments are direct quotes of any individual, nor should they be attributed to any business, or any single person. The responses are intended to provide the reader with a sense of what the common concerns/desires may be of merchants operating in Byram Township, with recognition that this is a limited sampling of those merchants.

Business experience

We asked each merchant how long they had been in business, and then how much of that time had been in business in Byram. The longest period of time in business was 47 years; the shortest was 3 weeks. These were also the longest and shortest periods in business, respectively, in Byram Township. The average amount of time in business was 22.8 years per merchant, of which 16.8 years were in Byram. All in all, the group that spoke to us was extensively experienced, and deeply rooted in the community. Six of the merchants also live in Byram Township.

One or more locations

We asked whether they operate other business locations, and 6 of the 15 indicated that this was their only business. A few are franchisees, and although their Byram store may be their only location, their business is part of a larger network of stores that are marketed by their franchisor.

Why locate in Byram?

We asked what was their reason for locating their business in Byram Township, and the majority (8 out of 15) cited high traffic counts on Route 206 as the reason. Three noted that

they had the opportunity to purchase pre-existing, successful businesses. Two merchants cited the convenience of working near to where they live. Other reasons included the lack of regional competition, above average household incomes, and perception of demand for medical professional space.

Space satisfaction

We asked whether their current space still met their needs, and for the overwhelming majority (12) the answer was “yes”. Two indicated that their space had become too large for the needs of their business, and that they intended to downsize by sub-letting space. A third indicated that the disruption of business caused by the Route 206 construction had been so great that his clientele had not returned, and he was seeking to change the nature of the business altogether. As such, his was the only business that would be closing (he did not project a date; it would turn upon his ability to redevelop his property into a different business). None of the interviewees were planning to retire (although two seemed eligible), and none were seeking other commercial space.

Business performance

We asked whether their business had performed better, worse, or about the same in 2015 as it had one year before. Only 3 indicated that their sales were higher; 5 said that sales were lower, and 4 said that sales were about the same. (Two businesses were unable to answer this question, as they had been in business for less than 1 year, and one other business refused to answer this question.) With only 3 businesses acknowledging an increase in sales, this suggests that the local retail economy is performing poorly in Byram.

Where do your customers come from?

We were curious to know whether any Byram businesses are drawing customers from outside of the region, as this would be a benefit to all the other businesses in town. The wider their net that is cast, the more consumers can be attracted into town, where they are exposed

to all of the other businesses. We asked each retail merchant⁹ where their customers came from, and their responses broke down into three categories:

- From Byram Township (3)
- From Byram Township, and adjacent communities (8)
- From outside of the region (3)

The majority of merchants interviewed draw their customers from a 20-minute drive-time area, which incorporates Byram and its adjacent towns. None of these retailers draw customers from south of Route I-80, nor from north of Newton. Only 3 businesses qualify as destination businesses that draw customers from outside of the region. One of those three is an income tax/financial services business, which means that the customers he attracts are not coming to Byram to shop; their business visit is likely to end without exploration of the shopping opportunities here.

We asked how new customers find their businesses, and most of them (12) said by referral from existing customers. Eleven of the 15 merchants told us that they do get people to come in who have noticed their business after driving by. Only 1 merchant indicated that new customers just walk-in while they were walking by the store. Just over half of them (8) indicated that they get new customers from the Internet; typically from Facebook and other social media. Most of these 8 merchants also make online sales via their business websites, something that JGSC Group encourages for all vendors of goods, and something that Byram Township could teach its merchant community to do¹⁰.

⁹ One business, Hafner Laboratories, is not a retail business, and although it serves business customers, they do their business by mail; no customers come to Byram to be serviced.

¹⁰ Internet sales are a great way to increase revenue at reduced cost, as the vendor is just expanding his/her audience without increasing marketing or inventory. The only added cost/effort to the merchant is shipping and handling, which is normally compensated in the sale price.

JGSC Group encourages the businesses in the communities we serve to seek and maintain customer contact data, so that a relationship may be developed with the customer. That relationship is often transferable to the business district, or at least to other related businesses in the district, by sharing their customer contact information. We asked each merchant if they kept contact information (mailing address, phone, and email address) for their clients, and less than half (7) do so. Some of those do so because it is required by their franchisor (i.e., GNC, Nissan, and Nutrition Zone), and they are not permitted to share the information with third parties. Even in these circumstances, Byram Township may be able to utilize these databases by offering a marketing message (i.e., “Come to the Byram Festival!”) to each of these vendors, and asking them to send it out to their customer database. Currently, none of the merchants interviewed are sharing their databases with other businesses, or with the Township, for cooperative marketing purposes in Byram.

What do you do to market your business?

We asked each merchant to tell us whether they use any of the following media to market their business, and whether they do anything in addition to these traditional media:

- Direct mail:5
- Circulars:3
- Newspaper advertisements:4
- TV advertisements:2
- Radio advertisements:3
- Billboards:0
- Email blasts:1
- Website:11
- Social media:4
- No proactive marketing2

As you can see, most merchants in Byram do very little to promote their own businesses. Most—but not all—of them have a website for their business, but very few do much beyond

that. A few boast real success with their Facebook business pages. It is surprising that only 1 of 15 merchants utilizes emails to communicate with their clients, considering that of all methods, email is the lowest cost, and can be very effective. Two merchants indicated that they do nothing at all to market their business.

Cross-promotion with other merchants in Byram

Cross-promotion is the concept of marketing one's business in conjunction with one or more others, to share the cost and increase the effectiveness of the campaign. Some businesses combine well for advertising purposes: a wine shop can pair well with a cheese shop; a candy shop can pair well with a florist as can a formal-wear store, etc. We asked all merchants whether they cross-promote, and only 3 are doing so. Two of the three are restaurants, and they are cross-promoting with charities in Byram, not with other businesses. Cross promotion is a very low-cost way to reach a wider audience than a single business could do on its own, and more of this should be occurring in Byram. One way that two businesses could help each other is by sending out a joint email blast to all of the customers on each of their customer databases. Very often, the loyal customers of one business are unaware of the other businesses they could patronize nearby, and the simple recommendation of their favorite merchant could get them to try the other business. This is an activity that the Township could help to organize for its merchants.

What co-tenant businesses would you like to see come to Byram?

Existing merchants usually have an interest in the type of new retail businesses that a community might seek to recruit into town, and we wanted to give these merchants the opportunity to tell us what those should be. Surprisingly, most of the merchants we spoke with did not express a preference, but four of those who did urged that the Township recruit more full-service restaurants, as something that would be beneficial to their business. Two merchants urged that the Town recruit nationally known retailers, as a way to attract new shoppers into town, while another merchant suggested the opposite: that the Township should seek only small, distinctive retailers to attract new visitors. One restaurant operator suggested that the Township should recruit a wholesale fish market, to more conveniently

and economically supply her restaurant. Another merchant urged that whatever the Township does, that it should not recruit any more auto parts/auto servicing businesses.

What should Byram Township do to help your business?

We asked this question to see whether merchants thought of local government as having a role in the well being of their business, and if so, what that role should be. We also wanted to take the opportunity to hear whether the business community has any complaints of which Township government should be aware as it seeks to support and improve local business.

The most-repeated request (by 6 merchants) was that the Township should market Byram as a place for visitors to come to shop and dine. Most of them saw that as a way for them to boost their retail sales by attracting a new consumer audience, while one of them saw this as a way to stimulate outside retailers to want to locate their business in Byram—something that would alleviate his commercial tenant vacancy problem.

Four merchants spoke about property tax relief for businesses as a way to help retail commerce in Byram. They feel that the property tax is a high and steadily increasing business expense that makes it difficult to operate a retail business, or to lease to retail tenants, and to develop new retail property here. One of these merchants urged that the Township should at least offer a tax reduction to businesses that have vacant commercial property, as they are not generating revenue with which to pay the tax. Another of those merchants has had to reduce the rents he collects from his commercial tenants in order not to increase their overall rent with the pass-through of property tax increases.

Another issue with the Township raised by four merchants regarded the recent sign ordinance. Each of them worried that the ordinance would impose fines and costs to make sign changes, that might have been better dealt with instead through merchant input in advance of the formulation of the ordinance, and a phased-in implementation of the ordinance. One of these merchants argued that signage along Route 206 is critical to the success of small businesses there, and sign enforcement can be strict with small businesses, while at the same time being

lenient with franchise businesses whose sign requirements are imposed by their managing corporation.

Three merchants expressed support for a change in the Township’s “bring your own booze” (BYOB) policy for Township restaurants: they believe that more dining would be supported if the Township would allow restaurants without liquor licenses to permit their patrons to bring their own wine or beer to dinner. (Interestingly, one of these merchants owns restaurants with liquor licenses.) [JGSC Group agrees that the allowance of BYOB would likely stimulate more dining business for the restaurants not now allowed to take advantage of it.]

While talking about things the Township could do, we asked whether they thought the Township should consider creating a business improvement district (BID) to take on any of these tasks, and others. Only two of the merchants were familiar with the concept of the business improvement district, and agreed that a BID could be an effective vehicle to help merchants; however, they were also wary of the new tax that it would entail. One of those indicated that if the merchants could manage the BID and get things done to benefit the businesses, that the tax could be worthwhile.

Several merchants commented on the Route 206 improvements for various reasons; some arguing that the Township should promote to outsiders the fact that the improvements are completed now, and all businesses are open. Others spoke to the lack of maintenance of the new Route 206 streetscaping, and argued that the Township should keep that grass cut, and the lettering of the gateway sign maintained, while their disagreement with the State is pending; failing to do so just hurts business.

Four merchants offered thoughts on the proposed Village Center: three consider the concept for a walkable shopping district to be either unworkable (arguing that it won’t attract sufficient shoppers to be self-sustaining), or less productive for Byram than the attraction of a single major national retailer. One merchant was an enthusiastic supporter of the Village

Center concept, saying that more vendors of goods are needed in Byram, and distinctive vendors are preferable to homogenous national retailers.

One merchant indicated that the Township should be more business-friendly, and relax zoning restrictions to accommodate business needs; however, we note that another merchant remarked that the Township was extremely prompt in reviewing and approving their new business permit.

What other thoughts did you want to share?

Finally, we invited open suggestions, to see what ideas the business community might want to offer regarding the proposed Village Center, or generally to help with the revitalization of the local retail economy. We list below their paraphrased comments:

- The old Adam Todd restaurant will never be sold as is; it should be demolished and redeveloped as a parking deck at grade with restaurant above overlooking lake;
- The Byram Carpet Store is closing; the Township should buy the property and move the municipal complex there, consolidating all municipal functions together, and siting the municipal center conveniently on Route 206;
- Byram should emulate public events like Somerville's "Sunday, Fun Day" brunch--it attracts outside visitors;
- The Township should take action on vacant, abandoned properties--like the former gas station across Route 206 from the ShopRite Plaza, vacant now for 24 years;
- The Township should not allow Byram homeowners to block needed commercial development in commercial zones;
- Byram's elected officials should meet and greet new merchants in town, and make a practice of shopping when possible in Byram's stores; and
- The Township should attract industries that provide employment, which would spur more housing demand.



APPENDIX

D. Economic data



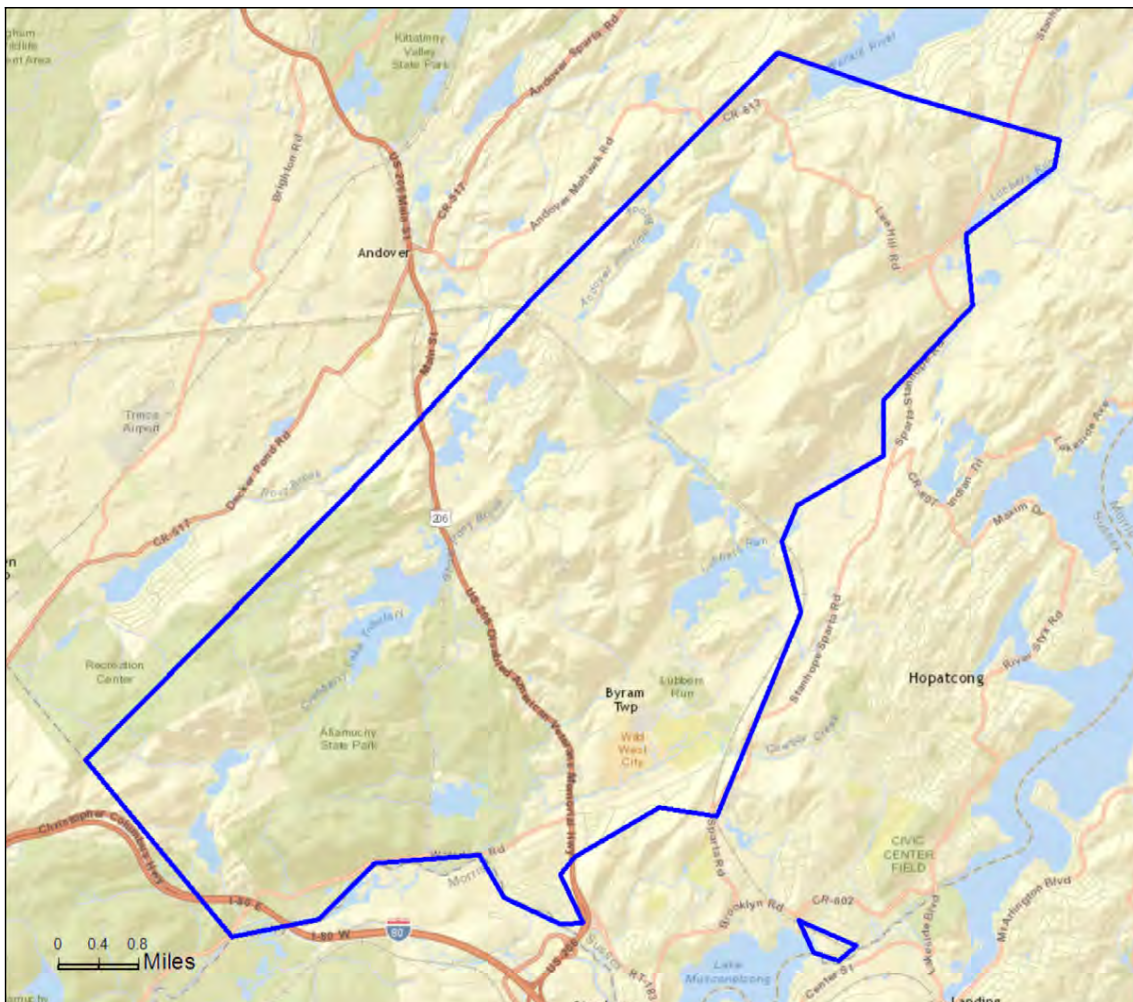
TOWNSHIP OF BYRAM Market Analysis Report



Site Details Map

Byram township
Byram township, NJ (3403709160)
County Subdivision

Prepared by Esri



This site is located in:

City: ---
County: Sussex County
State: New Jersey
ZIP Code: 07821
Census Tract: 34037374300
Census Block Group: 340373743002
CBSA: New York-Newark-Jersey City, NY-NJ-PA Metropolitan Statistical Area

October 31, 2015



TOWNSHIP OF BYRAM

Market Analysis Report



Market Profile

Byram township
Byram township, NJ (3403709160)
County Subdivision

Prepared by Esri

	Byram township, ...
Population Summary	
2000 Total Population	8,254
2010 Total Population	8,350
2015 Total Population	8,240
2015 Group Quarters	5
2020 Total Population	8,169
2015-2020 Annual Rate	-0.17%
Household Summary	
2000 Households	2,833
2000 Average Household Size	2.91
2010 Households	2,926
2010 Average Household Size	2.85
2015 Households	2,907
2015 Average Household Size	2.83
2020 Households	2,889
2020 Average Household Size	2.83
2015-2020 Annual Rate	-0.12%
2010 Families	2,361
2010 Average Family Size	3.19
2015 Families	2,349
2015 Average Family Size	3.17
2020 Families	2,336
2020 Average Family Size	3.16
2015-2020 Annual Rate	-0.11%
Housing Unit Summary	
2000 Housing Units	3,078
Owner Occupied Housing Units	85.5%
Renter Occupied Housing Units	6.5%
Vacant Housing Units	8.0%
2010 Housing Units	3,207
Owner Occupied Housing Units	85.4%
Renter Occupied Housing Units	5.9%
Vacant Housing Units	8.8%
2015 Housing Units	3,229
Owner Occupied Housing Units	83.6%
Renter Occupied Housing Units	6.4%
Vacant Housing Units	10.0%
2020 Housing Units	3,239
Owner Occupied Housing Units	82.9%
Renter Occupied Housing Units	6.3%
Vacant Housing Units	10.8%
Median Household Income	
2015	\$108,961
2020	\$128,180
Median Home Value	
2015	\$289,352
2020	\$315,603
Per Capita Income	
2015	\$50,619
2020	\$58,786
Median Age	
2010	41.1
2015	42.6
2020	43.3

Data Note: Household population includes persons not residing in group quarters. Average Household Size is the household population divided by total households.

Persons in families include the householder and persons related to the householder by birth, marriage, or adoption. Per Capita Income represents the income received by all persons aged 15 years and over divided by the total population.

Source: U.S. Census Bureau, Census 2010 Summary File 1. Esri forecasts for 2015 and 2020. Esri converted Census 2000 data into 2010 geography.

October 31, 2015



TOWNSHIP OF BYRAM Market Analysis Report



Market Profile

Byram township
Byram township, NJ (3403709160)
County Subdivision

Prepared by Esri

	Byram township, ...
2015 Households by Income	
Household Income Base	2,907
<\$15,000	3.2%
\$15,000 - \$24,999	2.5%
\$25,000 - \$34,999	2.6%
\$35,000 - \$49,999	6.0%
\$50,000 - \$74,999	17.0%
\$75,000 - \$99,999	14.0%
\$100,000 - \$149,999	19.0%
\$150,000 - \$199,999	14.8%
\$200,000+	20.9%
Average Household Income	\$143,453
2020 Households by Income	
Household Income Base	2,889
<\$15,000	2.6%
\$15,000 - \$24,999	1.7%
\$25,000 - \$34,999	1.6%
\$35,000 - \$49,999	5.0%
\$50,000 - \$74,999	15.5%
\$75,000 - \$99,999	11.0%
\$100,000 - \$149,999	19.1%
\$150,000 - \$199,999	18.7%
\$200,000+	24.7%
Average Household Income	\$166,192
2015 Owner Occupied Housing Units by Value	
Total	2,699
<\$50,000	0.2%
\$50,000 - \$99,999	0.7%
\$100,000 - \$149,999	2.0%
\$150,000 - \$199,999	7.0%
\$200,000 - \$249,999	18.2%
\$250,000 - \$299,999	27.8%
\$300,000 - \$399,999	30.0%
\$400,000 - \$499,999	8.8%
\$500,000 - \$749,999	4.2%
\$750,000 - \$999,999	0.8%
\$1,000,000 +	0.2%
Average Home Value	\$313,579
2020 Owner Occupied Housing Units by Value	
Total	2,684
<\$50,000	0.4%
\$50,000 - \$99,999	0.7%
\$100,000 - \$149,999	1.2%
\$150,000 - \$199,999	5.1%
\$200,000 - \$249,999	14.1%
\$250,000 - \$299,999	24.4%
\$300,000 - \$399,999	26.3%
\$400,000 - \$499,999	16.1%
\$500,000 - \$749,999	10.1%
\$750,000 - \$999,999	1.6%
\$1,000,000 +	0.1%
Average Home Value	\$352,459

Data Note: Income represents the preceding year, expressed in current dollars. Household income includes wage and salary earnings, interest dividends, net rents, pensions, SSI and welfare payments, child support, and alimony.

Source: U.S. Census Bureau, Census 2010 Summary File 1. Esri forecasts for 2015 and 2020. Esri converted Census 2000 data into 2010 geography.

October 31, 2015



TOWNSHIP OF BYRAM Market Analysis Report



Market Profile

Byram township
Byram township, NJ (3403709160)
County Subdivision

Prepared by Esri

	Byram township, ...
2010 Population by Age	
Total	8,350
0 - 4	5.5%
5 - 9	7.2%
10 - 14	8.1%
15 - 24	12.1%
25 - 34	8.4%
35 - 44	15.9%
45 - 54	18.6%
55 - 64	14.3%
65 - 74	7.2%
75 - 84	2.2%
85 +	0.7%
18 +	74.3%
2015 Population by Age	
Total	8,240
0 - 4	5.0%
5 - 9	6.6%
10 - 14	7.9%
15 - 24	11.4%
25 - 34	9.2%
35 - 44	13.4%
45 - 54	17.9%
55 - 64	15.5%
65 - 74	9.4%
75 - 84	2.8%
85 +	0.9%
18 +	76.3%
2020 Population by Age	
Total	8,169
0 - 4	4.9%
5 - 9	6.0%
10 - 14	8.0%
15 - 24	10.5%
25 - 34	8.8%
35 - 44	14.2%
45 - 54	16.1%
55 - 64	15.5%
65 - 74	10.9%
75 - 84	4.2%
85 +	1.0%
18 +	76.9%
2010 Population by Sex	
Males	4,198
Females	4,152
2015 Population by Sex	
Males	4,145
Females	4,095
2020 Population by Sex	
Males	4,119
Females	4,050

Source: U.S. Census Bureau, Census 2010 Summary File 1. Esri forecasts for 2015 and 2020. Esri converted Census 2000 data into 2010 geography.

October 31, 2015



TOWNSHIP OF BYRAM Market Analysis Report



Market Profile

Byram township
Byram township, NJ (3403709160)
County Subdivision

Prepared by Esri

	Byram township, ...
2010 Population by Race/Ethnicity	
Total	8,350
White Alone	94.3%
Black Alone	1.5%
American Indian Alone	0.1%
Asian Alone	2.1%
Pacific Islander Alone	0.0%
Some Other Race Alone	0.6%
Two or More Races	1.3%
Hispanic Origin	5.0%
Diversity Index	19.4
2015 Population by Race/Ethnicity	
Total	8,240
White Alone	93.4%
Black Alone	1.7%
American Indian Alone	0.1%
Asian Alone	2.5%
Pacific Islander Alone	0.0%
Some Other Race Alone	0.7%
Two or More Races	1.5%
Hispanic Origin	5.8%
Diversity Index	22.2
2020 Population by Race/Ethnicity	
Total	8,169
White Alone	92.4%
Black Alone	2.0%
American Indian Alone	0.2%
Asian Alone	2.9%
Pacific Islander Alone	0.0%
Some Other Race Alone	0.8%
Two or More Races	1.8%
Hispanic Origin	6.9%
Diversity Index	25.6
2010 Population by Relationship and Household Type	
Total	8,350
In Households	99.9%
In Family Households	91.4%
Householder	28.3%
Spouse	24.3%
Child	35.0%
Other relative	2.7%
Nonrelative	1.1%
In Nonfamily Households	8.6%
In Group Quarters	0.1%
Institutionalized Population	0.1%
Noninstitutionalized Population	0.0%

Data Note: Persons of Hispanic Origin may be of any race. The Diversity Index measures the probability that two people from the same area will be from different race/ethnic groups.

Source: U.S. Census Bureau, Census 2010 Summary File 1. Esri forecasts for 2015 and 2020. Esri converted Census 2000 data into 2010 geography.

October 31, 2015



TOWNSHIP OF BYRAM Market Analysis Report



Market Profile

Byram township
Byram township, NJ (3403709160)
County Subdivision

Prepared by Esri

	Byram township, ...
2015 Population 25+ by Educational Attainment	
Total	5,691
Less than 9th Grade	0.4%
9th - 12th Grade, No Diploma	1.4%
High School Graduate	21.3%
GED/Alternative Credential	2.1%
Some College, No Degree	24.2%
Associate Degree	9.4%
Bachelor's Degree	28.6%
Graduate/Professional Degree	12.6%
2015 Population 15+ by Marital Status	
Total	6,631
Never Married	25.8%
Married	64.8%
Widowed	3.1%
Divorced	6.3%
2015 Civilian Population 16+ in Labor Force	
Civilian Employed	95.9%
Civilian Unemployed	4.1%
2015 Employed Population 16+ by Industry	
Total	4,669
Agriculture/Mining	0.6%
Construction	5.2%
Manufacturing	13.5%
Wholesale Trade	2.8%
Retail Trade	8.6%
Transportation/Utilities	4.8%
Information	2.2%
Finance/Insurance/Real Estate	8.3%
Services	47.9%
Public Administration	6.1%
2015 Employed Population 16+ by Occupation	
Total	4,669
White Collar	73.4%
Management/Business/Financial	22.4%
Professional	26.9%
Sales	8.2%
Administrative Support	15.8%
Services	13.8%
Blue Collar	12.9%
Farming/Forestry/Fishing	0.0%
Construction/Extraction	3.6%
Installation/Maintenance/Repair	3.4%
Production	2.5%
Transportation/Material Moving	3.4%

Source: U.S. Census Bureau, Census 2010 Summary File 1. Esri forecasts for 2015 and 2020. Esri converted Census 2000 data into 2010 geography.

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TOWNSHIP OF BYRAM Market Analysis Report



Market Profile

Byram township
Byram township, NJ (3403709160)
County Subdivision

Prepared by Esri

	Byram township, ...
2010 Households by Type	
Total	2,926
Households with 1 Person	14.9%
Households with 2+ People	85.1%
Family Households	80.7%
Husband-wife Families	69.3%
With Related Children	33.5%
Other Family (No Spouse Present)	11.3%
Other Family with Male Householder	3.4%
With Related Children	1.7%
Other Family with Female Householder	8.0%
With Related Children	4.1%
Nonfamily Households	4.4%
All Households with Children	39.6%
Multigenerational Households	3.7%
Unmarried Partner Households	4.6%
Male-female	4.0%
Same-sex	0.6%
2010 Households by Size	
Total	2,926
1 Person Household	14.9%
2 Person Household	33.4%
3 Person Household	19.9%
4 Person Household	20.1%
5 Person Household	8.7%
6 Person Household	2.2%
7 + Person Household	0.9%
2010 Households by Tenure and Mortgage Status	
Total	2,926
Owner Occupied	93.6%
Owned with a Mortgage/Loan	75.6%
Owned Free and Clear	17.9%
Renter Occupied	6.4%

Data Note: Households with children include any households with people under age 18, related or not. Multigenerational households are families with 3 or more parent-child relationships. Unmarried partner households are usually classified as nonfamily households unless there is another member of the household related to the householder. Multigenerational and unmarried partner households are reported only to the tract level. Esri estimated block group data, which is used to estimate polygons or non-standard geography.

Source: U.S. Census Bureau, Census 2010 Summary File 1. Esri forecasts for 2015 and 2020. Esri converted Census 2000 data into 2010 geography.

October 31, 2015



TOWNSHIP OF BYRAM

Market Analysis Report



Market Profile

Byram township
Byram township, NJ (3403709160)
County Subdivision

Prepared by Esri

Byram township, ...	
Top 3 Tapestry Segments	
1.	Savvy Suburbanites (1D)
2.	Professional Pride (1B)
3.	Pleasantville (2B)
2015 Consumer Spending	
Apparel & Services: Total \$	\$12,406,443
Average Spent	\$4,267.78
Spending Potential Index	184
Computers & Accessories: Total \$	\$1,444,234
Average Spent	\$496.81
Spending Potential Index	195
Education: Total \$	\$10,114,837
Average Spent	\$3,479.48
Spending Potential Index	228
Entertainment/Recreation: Total \$	\$18,538,032
Average Spent	\$6,377.03
Spending Potential Index	193
Food at Home: Total \$	\$26,643,009
Average Spent	\$9,165.12
Spending Potential Index	175
Food Away from Home: Total \$	\$17,739,674
Average Spent	\$6,102.40
Spending Potential Index	186
Health Care: Total \$	\$25,871,531
Average Spent	\$8,899.74
Spending Potential Index	188
HH Furnishings & Equipment: Total \$	\$10,070,554
Average Spent	\$3,464.24
Spending Potential Index	188
Investments: Total \$	\$14,921,901
Average Spent	\$5,133.09
Spending Potential Index	186
Retail Goods: Total \$	\$135,699,580
Average Spent	\$46,680.28
Spending Potential Index	183
Shelter: Total \$	\$91,796,266
Average Spent	\$31,577.66
Spending Potential Index	192
TV/Video/Audio: Total \$	\$6,665,936
Average Spent	\$2,293.06
Spending Potential Index	175
Travel: Total \$	\$12,197,224
Average Spent	\$4,195.81
Spending Potential Index	215
Vehicle Maintenance & Repairs: Total \$	\$6,038,401
Average Spent	\$2,077.19
Spending Potential Index	186

Data Note: Consumer spending shows the amount spent on a variety of goods and services by households that reside in the area. Expenditures are shown by broad budget categories that are not mutually exclusive. Consumer spending does not equal business revenue. Total and Average Amount Spent Per Household represent annual figures. The Spending Potential Index represents the amount spent in the area relative to a national average of 100.

Source: Consumer Spending data are derived from the 2011 and 2012 Consumer Expenditure Surveys, Bureau of Labor Statistics. Esri.

Source: U.S. Census Bureau, Census 2010 Summary File 1. Esri forecasts for 2015 and 2020. Esri converted Census 2000 data into 2010 geography.

October 31, 2015



Retail MarketPlace Profile

Byram township
Byram township, NJ (3403709160)
Geography: County Subdivision

Prepared by Esri

Summary Demographics						
2015 Population						8,240
2015 Households						2,907
2015 Median Disposable Income						\$83,545
2015 Per Capita Income						\$50,619
Industry Summary	NAICS	Demand (Retail Potential)	Supply (Retail Sales)	Retail Gap	Leakage/Surplus Factor	Number of Businesses
Total Retail Trade and Food & Drink	44-45,722	\$169,291,343	\$82,271,025	\$87,020,318	34.6	52
Total Retail Trade	44-45	\$152,027,606	\$73,571,909	\$78,455,697	34.8	38
Total Food & Drink	722	\$17,263,737	\$8,699,116	\$8,564,621	33.0	14
Industry Group	NAICS	Demand (Retail Potential)	Supply (Retail Sales)	Retail Gap	Leakage/Surplus Factor	Number of Businesses
Motor Vehicle & Parts Dealers	441	\$31,682,066	\$50,075,885	-\$18,393,819	-22.5	4
Automobile Dealers	4411	\$27,599,840	\$47,758,802	-\$20,158,962	-26.8	1
Other Motor Vehicle Dealers	4412	\$2,001,123	\$1,482,073	\$519,050	14.9	1
Auto Parts, Accessories & Tire Stores	4413	\$2,081,103	\$835,010	\$1,246,093	42.7	2
Furniture & Home Furnishings Stores	442	\$3,964,572	\$1,296,729	\$2,667,843	50.7	2
Furniture Stores	4421	\$1,903,527	\$591,386	\$1,312,141	52.6	1
Home Furnishings Stores	4422	\$2,061,045	\$705,343	\$1,355,702	49.0	1
Electronics & Appliance Stores	443	\$4,637,721	\$661,575	\$3,976,146	75.0	3
Bldg Materials, Garden Equip. & Supply Stores	444	\$5,518,419	\$1,660,974	\$3,857,445	53.7	3
Bldg Material & Supplies Dealers	4441	\$4,740,894	\$178,035	\$4,562,859	92.8	2
Lawn & Garden Equip & Supply Stores	4442	\$777,525	\$1,482,939	-\$705,414	-31.2	1
Food & Beverage Stores	445	\$29,947,598	\$14,013,504	\$15,934,094	36.2	6
Grocery Stores	4451	\$25,673,246	\$13,787,572	\$11,885,674	30.1	5
Specialty Food Stores	4452	\$1,128,255	\$225,932	\$902,323	66.6	1
Beer, Wine & Liquor Stores	4453	\$3,146,097	\$0	\$3,146,097	100.0	0
Health & Personal Care Stores	446,4461	\$11,861,719	\$0	\$11,861,719	100.0	0
Gasoline Stations	447,4471	\$13,829,993	\$1,382,014	\$12,447,979	81.8	1
Clothing & Clothing Accessories Stores	448	\$11,050,389	\$0	\$11,050,389	100.0	0
Clothing Stores	4481	\$8,238,535	\$0	\$8,238,535	100.0	0
Shoe Stores	4482	\$1,303,857	\$0	\$1,303,857	100.0	0
Jewelry, Luggage & Leather Goods Stores	4483	\$1,507,997	\$0	\$1,507,997	100.0	0
Sporting Goods, Hobby, Book & Music Stores	451	\$3,626,066	\$458,418	\$3,167,648	77.6	5
Sporting Goods/Hobby/Musical Instr Stores	4511	\$2,996,797	\$282,309	\$2,714,488	82.8	3
Book, Periodical & Music Stores	4512	\$629,269	\$176,109	\$453,160	56.3	2
General Merchandise Stores	452	\$17,938,775	\$0	\$17,938,775	100.0	0
Department Stores Excluding Leased Depts.	4521	\$9,573,126	\$0	\$9,573,126	100.0	0
Other General Merchandise Stores	4529	\$8,365,649	\$0	\$8,365,649	100.0	0
Miscellaneous Store Retailers	453	\$4,903,745	\$1,061,466	\$3,842,279	64.4	11
Florists	4531	\$317,415	\$0	\$317,415	100.0	0
Office Supplies, Stationery & Gift Stores	4532	\$1,530,514	\$0	\$1,530,514	100.0	0
Used Merchandise Stores	4533	\$279,148	\$95,057	\$184,091	49.2	1
Other Miscellaneous Store Retailers	4539	\$2,776,668	\$966,409	\$1,810,259	48.4	10
Nonstore Retailers	454	\$13,066,543	\$2,961,344	\$10,105,199	63.0	3
Electronic Shopping & Mail-Order Houses	4541	\$10,657,665	\$861,263	\$9,796,402	85.0	1
Vending Machine Operators	4542	\$286,428	\$0	\$286,428	100.0	0
Direct Selling Establishments	4543	\$2,122,450	\$2,100,081	\$22,369	0.5	2
Food Services & Drinking Places	722	\$17,263,737	\$8,699,116	\$8,564,621	33.0	14
Full-Service Restaurants	7221	\$9,133,113	\$5,912,514	\$3,220,599	21.4	6
Limited-Service Eating Places	7222	\$6,525,328	\$1,812,054	\$4,713,274	56.5	3
Special Food Services	7223	\$1,049,460	\$72,962	\$976,498	87.0	1
Drinking Places - Alcoholic Beverages	7224	\$555,836	\$901,586	-\$345,750	-23.7	4

Data Note: Supply (retail sales) estimates sales to consumers by establishments. Sales to businesses are excluded. Demand (retail potential) estimates the expected amount spent by consumers at retail establishments. Supply and demand estimates are in current dollars. The Leakage/Surplus Factor presents a snapshot of retail opportunity. This is a measure of the relationship between supply and demand that ranges from +100 (total leakage) to -100 (total surplus). A positive value represents 'leakage' of retail opportunity outside the trade area. A negative value represents a surplus of retail sales, a market where customers are drawn in from outside the trade area. The Retail Gap represents the difference between Retail Potential and Retail Sales. Esri uses the North American Industry Classification System (NAICS) to classify businesses by their primary type of economic activity. Retail establishments are classified into 27 industry groups in the Retail Trade sector, as well as four industry groups within the Food Services & Drinking Establishments subsector. For more information on the Retail MarketPlace data, please view the methodology statement at <http://www.esri.com/library/whitepapers/pdfs/esri-data-retail-marketplace.pdf>.

Source: Esri and Dun & Bradstreet. Copyright 2015 Dun & Bradstreet, Inc. All rights reserved.

October 31, 2015

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TOWNSHIP OF BYRAM Market Analysis Report

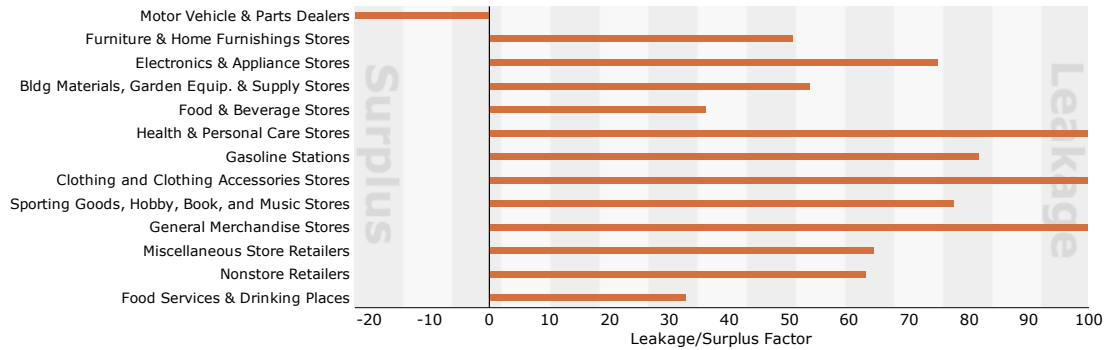


Retail MarketPlace Profile

Byram township
Byram township, NJ (3403709160)
Geography: County Subdivision

Prepared by Esri

Leakage/Surplus Factor by Industry Subsector



Leakage/Surplus Factor by Industry Group



Source: Esri and Dun & Bradstreet. Copyright 2015 Dun & Bradstreet, Inc. All rights reserved.

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TOWNSHIP OF BYRAM Market Analysis Report



Business Summary

Byram township
Byram township, NJ (3403709160)
Geography: County Subdivision

Prepared by Esri

Data for all businesses in area		Byram township, ...			
Total Businesses:		306			
Total Employees:		2,416			
Total Residential Population:		8,240			
Employee/Residential Population Ratio:		0.29:1			
by SIC Codes	Number	Percent	Number	Percent	Employees
Agriculture & Mining	17	5.6%	66	2.7%	
Construction	33	10.8%	119	4.9%	
Manufacturing	13	4.2%	81	3.4%	
Transportation	5	1.6%	13	0.5%	
Communication	1	0.3%	8	0.3%	
Utility	5	1.6%	19	0.8%	
Wholesale Trade	15	4.9%	73	3.0%	
Retail Trade Summary	63	20.6%	632	26.2%	
Home Improvement	3	1.0%	12	0.5%	
General Merchandise Stores	4	1.3%	18	0.7%	
Food Stores	7	2.3%	347	14.4%	
Auto Dealers, Gas Stations, Auto Aftermarket	10	3.3%	86	3.6%	
Apparel & Accessory Stores	1	0.3%	10	0.4%	
Furniture & Home Furnishings	6	2.0%	18	0.7%	
Eating & Drinking Places	17	5.6%	95	3.9%	
Miscellaneous Retail	15	4.9%	46	1.9%	
Finance, Insurance, Real Estate Summary	29	9.5%	153	6.3%	
Banks, Savings & Lending Institutions	15	4.9%	20	0.8%	
Securities Brokers	4	1.3%	9	0.4%	
Insurance Carriers & Agents	1	0.3%	3	0.1%	
Real Estate, Holding, Other Investment Offices	9	2.9%	121	5.0%	
Services Summary	96	31.4%	996	41.2%	
Hotels & Lodging	8	2.6%	135	5.6%	
Automotive Services	6	2.0%	12	0.5%	
Motion Pictures & Amusements	7	2.3%	106	4.4%	
Health Services	8	2.6%	40	1.7%	
Legal Services	3	1.0%	8	0.3%	
Education Institutions & Libraries	6	2.0%	400	16.6%	
Other Services	58	19.0%	295	12.2%	
Government	17	5.6%	224	9.3%	
Unclassified Establishments	12	3.9%	32	1.3%	
Totals	306	100.0%	2,416	100.0%	

Source: Copyright 2015 Infogroup, Inc. All rights reserved. Esri Total Residential Population forecasts for 2015.

October 31, 2015



TOWNSHIP OF BYRAM Market Analysis Report



Business Summary

Byram township
Byram township, NJ (3403709160)
Geography: County Subdivision

Prepared by Esri

by NAICS Codes	Businesses		Employees	
	Number	Percent	Number	Percent
Agriculture, Forestry, Fishing & Hunting	3	1.0%	12	0.5%
Mining	2	0.7%	6	0.2%
Utilities	3	1.0%	12	0.5%
Construction	34	11.1%	121	5.0%
Manufacturing	13	4.2%	82	3.4%
Wholesale Trade	15	4.9%	73	3.0%
Retail Trade	43	14.1%	514	21.3%
Motor Vehicle & Parts Dealers	6	2.0%	78	3.2%
Furniture & Home Furnishings Stores	3	1.0%	7	0.3%
Electronics & Appliance Stores	4	1.3%	14	0.6%
Bldg Material & Garden Equipment & Supplies Dealers	3	1.0%	12	0.5%
Food & Beverage Stores	4	1.3%	333	13.8%
Health & Personal Care Stores	3	1.0%	9	0.4%
Gasoline Stations	4	1.3%	8	0.3%
Clothing & Clothing Accessories Stores	3	1.0%	13	0.5%
Sport Goods, Hobby, Book, & Music Stores	2	0.7%	9	0.4%
General Merchandise Stores	4	1.3%	18	0.7%
Miscellaneous Store Retailers	6	2.0%	10	0.4%
Nonstore Retailers	1	0.3%	3	0.1%
Transportation & Warehousing	3	1.0%	6	0.2%
Information	3	1.0%	15	0.6%
Finance & Insurance	20	6.5%	32	1.3%
Central Bank/Credit Intermediation & Related Activities	15	4.9%	20	0.8%
Securities, Commodity Contracts & Other Financial	4	1.3%	9	0.4%
Insurance Carriers & Related Activities; Funds, Trusts &	1	0.3%	3	0.1%
Real Estate, Rental & Leasing	10	3.3%	125	5.2%
Professional, Scientific & Tech Services	21	6.9%	103	4.3%
Legal Services	4	1.3%	11	0.5%
Management of Companies & Enterprises	0	0.0%	0	0.0%
Administrative & Support & Waste Management & Remediation	22	7.2%	90	3.7%
Educational Services	6	2.0%	400	16.6%
Health Care & Social Assistance	11	3.6%	76	3.1%
Arts, Entertainment & Recreation	9	2.9%	109	4.5%
Accommodation & Food Services	27	8.8%	250	10.3%
Accommodation	8	2.6%	135	5.6%
Food Services & Drinking Places	19	6.2%	115	4.8%
Other Services (except Public Administration)	33	10.8%	139	5.8%
Automotive Repair & Maintenance	4	1.3%	6	0.2%
Public Administration	17	5.6%	224	9.3%
Unclassified Establishments	11	3.6%	27	1.1%
Total	306	100.0%	2,416	100.0%

Source: Copyright 2015 Infogroup, Inc. All rights reserved. Esri Total Residential Population forecasts for 2015.

October 31, 2015



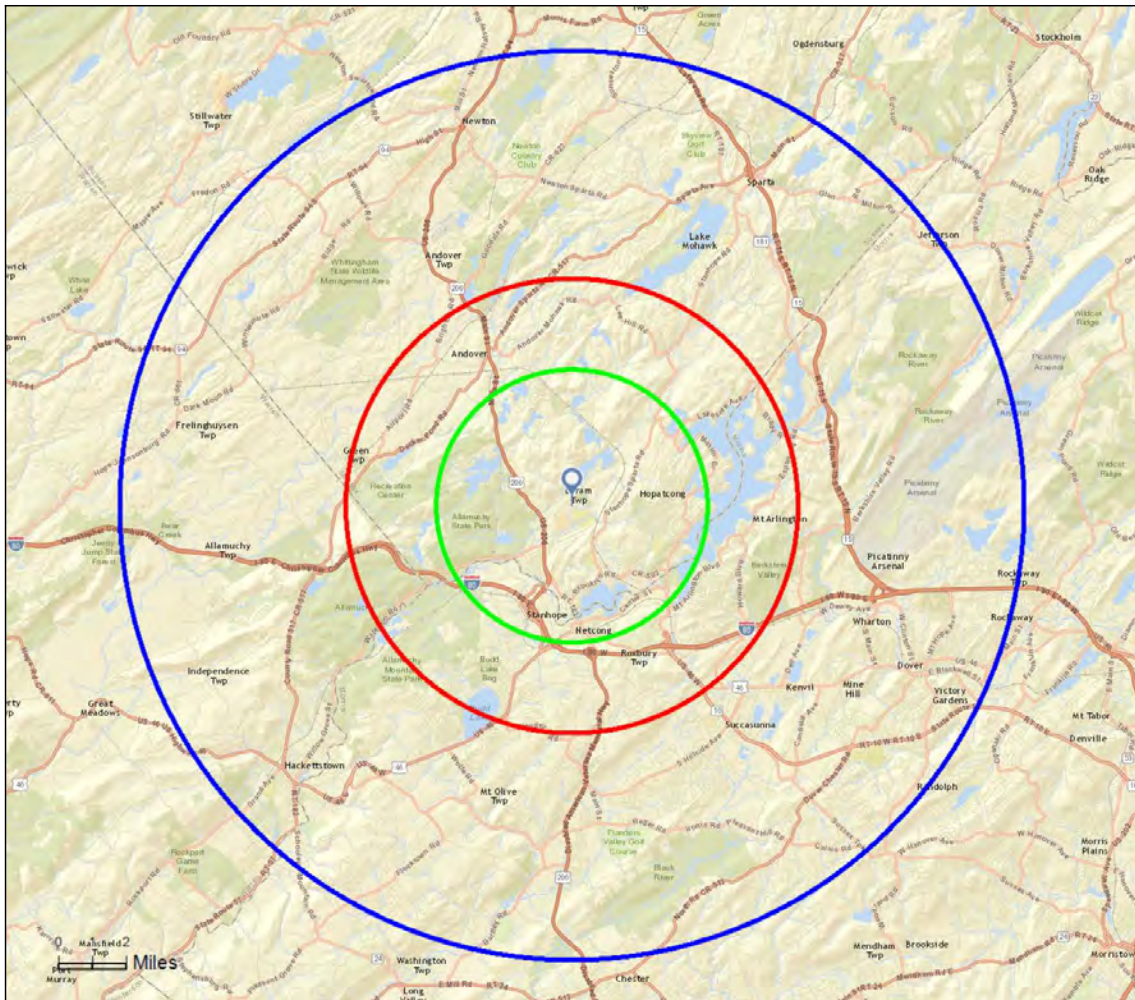
TOWNSHIP OF BYRAM Market Analysis Report



Site Details Map

Byram 3,5,10-miles
10 Mansfield Dr, Byram Twp, New Jersey, 07874
Rings: 3, 5, 10 mile radii

Prepared by Esri
Latitude: 40.93709
Longitude: -74.70656



This site is located in:

City: ---
County: Sussex County
State: New Jersey
ZIP Code: 07874
Census Tract: 34037374300
Census Block Group: 340373743002
CBSA: New York-Newark-Jersey City, NY-NJ-PA Metropolitan Statistical Area

October 31, 2015



TOWNSHIP OF BYRAM Market Analysis Report



Market Profile

Byram 3,5,10-miles
10 Mansfield Dr, Byram Twp, New Jersey, 07874
Rings: 3, 5, 10 mile radii

Prepared by Esri
Latitude: 40.93709
Longitude: -74.70656

	3 miles	5 miles	10 miles
Population Summary			
2000 Total Population	27,063	55,916	220,228
2010 Total Population	26,459	57,018	231,019
2015 Total Population	26,249	56,895	231,864
2015 Group Quarters	34	54	2,966
2020 Total Population	26,156	57,036	233,589
2015-2020 Annual Rate	-0.07%	0.05%	0.15%
Household Summary			
2000 Households	9,796	20,455	79,270
2000 Average Household Size	2.76	2.73	2.75
2010 Households	9,906	21,710	84,806
2010 Average Household Size	2.67	2.62	2.69
2015 Households	9,919	21,817	85,623
2015 Average Household Size	2.64	2.61	2.67
2020 Households	9,923	21,928	86,464
2020 Average Household Size	2.63	2.60	2.67
2015-2020 Annual Rate	0.01%	0.10%	0.20%
2010 Families	7,143	15,379	60,577
2010 Average Family Size	3.14	3.13	3.18
2015 Families	7,166	15,501	61,275
2015 Average Family Size	3.10	3.09	3.16
2020 Families	7,177	15,607	61,952
2020 Average Family Size	3.08	3.08	3.14
2015-2020 Annual Rate	0.03%	0.14%	0.22%
Housing Unit Summary			
2000 Housing Units	10,406	21,807	82,614
Owner Occupied Housing Units	76.8%	75.2%	70.5%
Renter Occupied Housing Units	17.3%	18.6%	25.5%
Vacant Housing Units	5.9%	6.2%	4.0%
2010 Housing Units	10,686	23,675	90,383
Owner Occupied Housing Units	76.6%	73.0%	69.0%
Renter Occupied Housing Units	16.1%	18.7%	24.8%
Vacant Housing Units	7.3%	8.3%	6.2%
2015 Housing Units	10,793	23,940	91,557
Owner Occupied Housing Units	74.6%	71.3%	67.3%
Renter Occupied Housing Units	17.3%	19.8%	26.2%
Vacant Housing Units	8.1%	8.9%	6.5%
2020 Housing Units	10,857	24,230	92,812
Owner Occupied Housing Units	74.1%	70.7%	66.9%
Renter Occupied Housing Units	17.3%	19.8%	26.3%
Vacant Housing Units	8.6%	9.5%	6.8%
Median Household Income			
2015	\$84,048	\$84,853	\$85,683
2020	\$92,737	\$93,750	\$96,020
Median Home Value			
2015	\$245,984	\$280,282	\$340,824
2020	\$262,951	\$320,747	\$405,042
Per Capita Income			
2015	\$37,606	\$40,011	\$41,266
2020	\$42,795	\$45,165	\$47,015
Median Age			
2010	39.9	40.7	40.4
2015	41.3	42.2	41.6
2020	42.1	43.2	42.5

Data Note: Household population includes persons not residing in group quarters. Average Household Size is the household population divided by total households.

Persons in families include the householder and persons related to the householder by birth, marriage, or adoption. Per Capita Income represents the income received by all persons aged 15 years and over divided by the total population.

Source: U.S. Census Bureau, Census 2010 Summary File 1. Esri forecasts for 2015 and 2020. Esri converted Census 2000 data into 2010 geography.

October 31, 2015



TOWNSHIP OF BYRAM Market Analysis Report



Market Profile

Byram 3,5,10-miles
10 Mansfield Dr, Byram Twp, New Jersey, 07874
Rings: 3, 5, 10 mile radii

Prepared by Esri
Latitude: 40.93709
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	3 miles	5 miles	10 miles
2015 Households by Income			
Household Income Base	9,919	21,817	85,623
<\$15,000	4.1%	3.7%	4.8%
\$15,000 - \$24,999	4.2%	3.8%	4.5%
\$25,000 - \$34,999	6.0%	6.0%	6.1%
\$35,000 - \$49,999	9.7%	10.7%	10.7%
\$50,000 - \$74,999	17.6%	17.6%	16.3%
\$75,000 - \$99,999	18.9%	17.5%	15.0%
\$100,000 - \$149,999	24.2%	23.2%	20.2%
\$150,000 - \$199,999	8.6%	9.6%	11.3%
\$200,000+	6.7%	8.1%	11.0%
Average Household Income	\$99,555	\$104,088	\$111,258
2020 Households by Income			
Household Income Base	9,923	21,928	86,464
<\$15,000	3.5%	3.1%	4.2%
\$15,000 - \$24,999	2.9%	2.6%	3.3%
\$25,000 - \$34,999	4.0%	4.0%	4.2%
\$35,000 - \$49,999	8.7%	9.7%	9.6%
\$50,000 - \$74,999	16.8%	17.0%	15.9%
\$75,000 - \$99,999	18.3%	16.9%	14.6%
\$100,000 - \$149,999	26.7%	25.5%	21.6%
\$150,000 - \$199,999	11.1%	11.6%	13.4%
\$200,000+	8.0%	9.6%	13.2%
Average Household Income	\$112,848	\$117,189	\$126,556
2015 Owner Occupied Housing Units by Value			
Total	8,051	17,079	61,641
<\$50,000	0.1%	0.1%	0.1%
\$50,000 - \$99,999	1.5%	0.9%	0.8%
\$100,000 - \$149,999	7.5%	4.8%	2.7%
\$150,000 - \$199,999	17.1%	12.3%	7.5%
\$200,000 - \$249,999	25.8%	20.0%	12.7%
\$250,000 - \$299,999	22.5%	19.6%	14.9%
\$300,000 - \$399,999	17.4%	22.4%	27.8%
\$400,000 - \$499,999	5.0%	10.4%	15.6%
\$500,000 - \$749,999	2.2%	7.3%	13.4%
\$750,000 - \$999,999	0.5%	1.3%	2.9%
\$1,000,000 +	0.2%	0.8%	1.6%
Average Home Value	\$265,478	\$319,853	\$383,788
2020 Owner Occupied Housing Units by Value			
Total	8,040	17,119	62,080
<\$50,000	0.3%	0.2%	0.2%
\$50,000 - \$99,999	1.6%	1.0%	0.6%
\$100,000 - \$149,999	5.2%	3.1%	1.5%
\$150,000 - \$199,999	14.5%	9.5%	5.2%
\$200,000 - \$249,999	22.8%	15.9%	9.2%
\$250,000 - \$299,999	21.4%	16.4%	11.4%
\$300,000 - \$399,999	16.9%	19.5%	20.8%
\$400,000 - \$499,999	9.9%	18.1%	22.6%
\$500,000 - \$749,999	6.2%	13.2%	21.0%
\$750,000 - \$999,999	0.9%	2.3%	5.7%
\$1,000,000 +	0.2%	1.0%	1.9%
Average Home Value	\$296,589	\$366,374	\$442,067

Data Note: Income represents the preceding year, expressed in current dollars. Household income includes wage and salary earnings, interest dividends, net rents, pensions, SSI and welfare payments, child support, and alimony.

Source: U.S. Census Bureau, Census 2010 Summary File 1. Esri forecasts for 2015 and 2020. Esri converted Census 2000 data into 2010 geography.

October 31, 2015



TOWNSHIP OF BYRAM Market Analysis Report



Market Profile

Byram 3,5,10-miles
10 Mansfield Dr, Byram Twp, New Jersey, 07874
Rings: 3, 5, 10 mile radii

Prepared by Esri
Latitude: 40.93709
Longitude: -74.70656

	3 miles	5 miles	10 miles
2010 Population by Age			
Total	26,459	57,018	231,018
0 - 4	5.9%	5.7%	5.7%
5 - 9	5.9%	6.2%	6.6%
10 - 14	6.6%	6.8%	7.1%
15 - 24	12.4%	11.8%	12.1%
25 - 34	12.2%	11.1%	11.0%
35 - 44	15.6%	15.7%	15.2%
45 - 54	17.8%	18.0%	17.7%
55 - 64	13.4%	13.4%	12.5%
65 - 74	6.6%	6.8%	6.7%
75 - 84	2.7%	3.1%	3.7%
85 +	1.0%	1.1%	1.7%
18 +	77.2%	76.8%	75.9%
2015 Population by Age			
Total	26,249	56,895	231,864
0 - 4	5.4%	5.2%	5.2%
5 - 9	6.2%	6.1%	6.1%
10 - 14	6.2%	6.5%	7.0%
15 - 24	11.4%	11.4%	12.3%
25 - 34	12.2%	11.3%	11.3%
35 - 44	14.1%	13.4%	12.9%
45 - 54	16.7%	17.2%	16.8%
55 - 64	14.8%	14.7%	14.1%
65 - 74	8.8%	9.2%	8.6%
75 - 84	3.2%	3.6%	3.9%
85 +	1.1%	1.3%	1.9%
18 +	78.6%	78.4%	77.6%
2020 Population by Age			
Total	26,157	57,035	233,591
0 - 4	5.2%	5.0%	5.1%
5 - 9	5.5%	5.4%	5.5%
10 - 14	6.4%	6.5%	6.4%
15 - 24	10.1%	10.4%	11.2%
25 - 34	12.6%	11.9%	12.2%
35 - 44	14.2%	13.1%	12.8%
45 - 54	14.7%	15.1%	14.7%
55 - 64	15.4%	15.6%	15.2%
65 - 74	10.4%	10.6%	10.1%
75 - 84	4.3%	4.8%	4.8%
85 +	1.2%	1.5%	2.0%
18 +	79.4%	79.4%	79.1%
2010 Population by Sex			
Males	13,166	28,220	113,856
Females	13,293	28,798	117,163
2015 Population by Sex			
Males	13,057	28,156	114,281
Females	13,192	28,738	117,583
2020 Population by Sex			
Males	13,056	28,273	115,222
Females	13,100	28,763	118,367

Source: U.S. Census Bureau, Census 2010 Summary File 1. Esri forecasts for 2015 and 2020. Esri converted Census 2000 data into 2010 geography.

October 31, 2015



TOWNSHIP OF BYRAM Market Analysis Report



Market Profile

Byram 3,5,10-miles
10 Mansfield Dr, Byram Twp, New Jersey, 07874
Rings: 3, 5, 10 mile radii

Prepared by Esri
Latitude: 40.93709
Longitude: -74.70656

	3 miles	5 miles	10 miles
2010 Population by Race/Ethnicity			
Total	26,458	57,018	231,017
White Alone	90.5%	89.8%	85.2%
Black Alone	2.7%	2.7%	3.3%
American Indian Alone	0.1%	0.1%	0.2%
Asian Alone	2.4%	3.5%	5.2%
Pacific Islander Alone	0.0%	0.0%	0.0%
Some Other Race Alone	2.4%	1.9%	3.9%
Two or More Races	1.9%	2.0%	2.2%
Hispanic Origin	10.9%	9.4%	15.6%
Diversity Index	33.9	33.0	46.3
2015 Population by Race/Ethnicity			
Total	26,249	56,895	231,864
White Alone	89.0%	88.1%	83.1%
Black Alone	3.0%	3.1%	3.7%
American Indian Alone	0.2%	0.2%	0.3%
Asian Alone	2.8%	4.1%	5.9%
Pacific Islander Alone	0.0%	0.1%	0.0%
Some Other Race Alone	2.8%	2.2%	4.5%
Two or More Races	2.2%	2.3%	2.5%
Hispanic Origin	12.7%	11.2%	17.7%
Diversity Index	38.1	37.6	50.7
2020 Population by Race/Ethnicity			
Total	26,155	57,036	233,587
White Alone	87.3%	86.2%	80.9%
Black Alone	3.5%	3.5%	4.1%
American Indian Alone	0.2%	0.2%	0.3%
Asian Alone	3.2%	4.7%	6.7%
Pacific Islander Alone	0.0%	0.1%	0.0%
Some Other Race Alone	3.3%	2.7%	5.1%
Two or More Races	2.5%	2.7%	2.8%
Hispanic Origin	14.9%	13.3%	20.1%
Diversity Index	42.9	42.6	55.1
2010 Population by Relationship and Household Type			
Total	26,459	57,018	231,019
In Households	99.9%	99.9%	98.7%
In Family Households	86.6%	86.0%	85.7%
Householder	27.0%	27.0%	26.2%
Spouse	21.3%	21.8%	21.1%
Child	32.8%	32.2%	32.2%
Other relative	3.7%	3.3%	4.0%
Nonrelative	1.9%	1.7%	2.2%
In Nonfamily Households	13.2%	13.9%	13.0%
In Group Quarters	0.1%	0.1%	1.3%
Institutionalized Population	0.0%	0.0%	0.8%
Noninstitutionalized Population	0.1%	0.1%	0.5%

Data Note: Persons of Hispanic Origin may be of any race. The Diversity Index measures the probability that two people from the same area will be from different race/ethnic groups.

Source: U.S. Census Bureau, Census 2010 Summary File 1. Esri forecasts for 2015 and 2020. Esri converted Census 2000 data into 2010 geography.

October 31, 2015



TOWNSHIP OF BYRAM Market Analysis Report



Market Profile

Byram 3,5,10-miles
10 Mansfield Dr, Byram Twp, New Jersey, 07874
Rings: 3, 5, 10 mile radii

Prepared by Esri
Latitude: 40.93709
Longitude: -74.70656

	3 miles	5 miles	10 miles
2015 Population 25+ by Educational Attainment			
Total	18,590	40,222	160,988
Less than 9th Grade	1.6%	1.7%	3.8%
9th - 12th Grade, No Diploma	4.2%	3.6%	4.0%
High School Graduate	29.3%	27.5%	24.2%
GED/Alternative Credential	3.3%	3.0%	2.5%
Some College, No Degree	22.8%	21.6%	17.3%
Associate Degree	9.1%	7.9%	7.9%
Bachelor's Degree	20.6%	23.1%	26.3%
Graduate/Professional Degree	9.1%	11.6%	14.0%
2015 Population 15+ by Marital Status			
Total	21,585	46,734	189,403
Never Married	29.5%	28.2%	29.5%
Married	56.5%	57.2%	56.0%
Widowed	4.3%	4.9%	5.1%
Divorced	9.7%	9.6%	9.4%
2015 Civilian Population 16+ in Labor Force			
Civilian Employed	94.0%	94.2%	94.8%
Civilian Unemployed	6.0%	5.8%	5.2%
2015 Employed Population 16+ by Industry			
Total	14,613	31,497	125,036
Agriculture/Mining	0.1%	0.4%	0.4%
Construction	7.0%	5.8%	6.3%
Manufacturing	10.2%	11.8%	11.7%
Wholesale Trade	3.0%	3.2%	3.0%
Retail Trade	11.9%	11.7%	11.2%
Transportation/Utilities	5.9%	5.7%	5.0%
Information	2.4%	3.0%	2.6%
Finance/Insurance/Real Estate	8.8%	8.4%	7.8%
Services	46.2%	46.0%	48.2%
Public Administration	4.5%	4.0%	3.7%
2015 Employed Population 16+ by Occupation			
Total	14,613	31,495	125,037
White Collar	64.7%	68.7%	66.7%
Management/Business/Financial	14.6%	17.1%	18.4%
Professional	21.9%	23.3%	23.6%
Sales	12.6%	12.7%	11.6%
Administrative Support	15.6%	15.5%	13.2%
Services	16.4%	14.0%	16.0%
Blue Collar	18.9%	17.3%	17.3%
Farming/Forestry/Fishing	0.0%	0.1%	0.1%
Construction/Extraction	5.2%	3.8%	4.3%
Installation/Maintenance/Repair	4.5%	4.6%	3.5%
Production	3.5%	3.8%	4.4%
Transportation/Material Moving	5.8%	5.0%	4.9%

Source: U.S. Census Bureau, Census 2010 Summary File 1. Esri forecasts for 2015 and 2020. Esri converted Census 2000 data into 2010 geography.

October 31, 2015



TOWNSHIP OF BYRAM Market Analysis Report



Market Profile

Byram 3,5,10-miles
10 Mansfield Dr, Byram Twp, New Jersey, 07874
Rings: 3, 5, 10 mile radii

Prepared by Esri
Latitude: 40.93709
Longitude: -74.70656

	3 miles	5 miles	10 miles
2010 Households by Type			
Total	9,906	21,710	84,806
Households with 1 Person	21.7%	23.0%	23.2%
Households with 2+ People	78.3%	77.0%	76.8%
Family Households	72.1%	70.8%	71.4%
Husband-wife Families	56.9%	57.3%	57.6%
With Related Children	26.3%	26.9%	28.4%
Other Family (No Spouse Present)	15.2%	13.6%	13.9%
Other Family with Male Householder	4.8%	4.1%	4.3%
With Related Children	2.4%	2.2%	2.2%
Other Family with Female Householder	10.4%	9.4%	9.5%
With Related Children	5.6%	5.1%	5.5%
Nonfamily Households	6.2%	6.1%	5.3%
All Households with Children	34.6%	34.5%	36.4%
Multigenerational Households	4.4%	3.8%	3.8%
Unmarried Partner Households	6.6%	6.4%	5.7%
Male-female	5.9%	5.6%	5.0%
Same-sex	0.7%	0.8%	0.7%
2010 Households by Size			
Total	9,905	21,710	84,807
1 Person Household	21.7%	23.0%	23.2%
2 Person Household	32.1%	32.5%	30.6%
3 Person Household	18.8%	18.0%	17.6%
4 Person Household	16.8%	16.7%	17.3%
5 Person Household	7.2%	6.9%	7.5%
6 Person Household	2.3%	2.0%	2.4%
7 + Person Household	1.0%	0.9%	1.4%
2010 Households by Tenure and Mortgage Status			
Total	9,906	21,710	84,806
Owner Occupied	82.6%	79.6%	73.6%
Owned with a Mortgage/Loan	67.5%	64.5%	58.1%
Owned Free and Clear	15.1%	15.1%	15.5%
Renter Occupied	17.4%	20.4%	26.4%

Data Note: Households with children include any households with people under age 18, related or not. Multigenerational households are families with 3 or more parent-child relationships. Unmarried partner households are usually classified as nonfamily households unless there is another member of the household related to the householder. Multigenerational and unmarried partner households are reported only to the tract level. Esri estimated block group data, which is used to estimate polygons or non-standard geography.

Source: U.S. Census Bureau, Census 2010 Summary File 1. Esri forecasts for 2015 and 2020. Esri converted Census 2000 data into 2010 geography.

October 31, 2015



TOWNSHIP OF BYRAM Market Analysis Report



Market Profile

Byram 3,5,10-miles
10 Mansfield Dr, Byram Twp, New Jersey, 07874
Rings: 3, 5, 10 mile radii

Prepared by Esri
Latitude: 40.93709
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	3 miles	5 miles	10 miles
Top 3 Tapestry Segments			
1. Pleasantville (2B)	Pleasantville (2B)	Pleasantville (2B)	Pleasantville (2B)
2. Home Improvement (4B)	Savvy Suburbanites (1D)	Savvy Suburbanites (1D)	Savvy Suburbanites (1D)
3. City Lights (8A)	Home Improvement (4B)	Professional Pride (1B)	
2015 Consumer Spending			
Apparel & Services: Total \$	\$29,704,160	\$68,562,901	\$291,829,780
Average Spent	\$2,994.67	\$3,142.64	\$3,408.31
Spending Potential Index	129	136	147
Computers & Accessories: Total \$	\$3,453,473	\$7,946,699	\$33,535,449
Average Spent	\$348.17	\$364.24	\$391.66
Spending Potential Index	137	143	154
Education: Total \$	\$23,360,784	\$53,297,982	\$222,651,808
Average Spent	\$2,355.16	\$2,442.96	\$2,600.37
Spending Potential Index	155	160	171
Entertainment/Recreation: Total \$	\$43,534,798	\$100,110,298	\$419,179,139
Average Spent	\$4,389.03	\$4,588.64	\$4,895.64
Spending Potential Index	133	139	148
Food at Home: Total \$	\$64,689,570	\$149,176,984	\$633,616,066
Average Spent	\$6,521.78	\$6,837.65	\$7,400.07
Spending Potential Index	125	131	142
Food Away from Home: Total \$	\$42,389,545	\$97,799,959	\$414,501,728
Average Spent	\$4,273.57	\$4,482.74	\$4,841.01
Spending Potential Index	130	136	147
Health Care: Total \$	\$60,334,836	\$139,110,241	\$577,617,466
Average Spent	\$6,082.75	\$6,376.23	\$6,746.05
Spending Potential Index	128	134	142
HH Furnishings & Equipment: Total \$	\$23,399,227	\$54,178,444	\$228,343,230
Average Spent	\$2,359.03	\$2,483.31	\$2,666.84
Spending Potential Index	128	135	145
Investments: Total \$	\$37,358,138	\$83,346,279	\$357,443,992
Average Spent	\$3,766.32	\$3,820.24	\$4,174.63
Spending Potential Index	137	139	152
Retail Goods: Total \$	\$320,332,565	\$739,451,590	\$3,106,756,562
Average Spent	\$32,294.84	\$33,893.37	\$36,284.14
Spending Potential Index	127	133	142
Shelter: Total \$	\$226,822,594	\$517,987,608	\$2,172,538,100
Average Spent	\$22,867.49	\$23,742.38	\$25,373.30
Spending Potential Index	139	144	154
TV/Video/Audio: Total \$	\$16,175,019	\$37,359,810	\$157,146,588
Average Spent	\$1,630.71	\$1,712.42	\$1,835.33
Spending Potential Index	125	131	140
Travel: Total \$	\$27,940,747	\$63,974,833	\$266,434,623
Average Spent	\$2,816.89	\$2,932.34	\$3,111.72
Spending Potential Index	144	150	159
Vehicle Maintenance & Repairs: Total \$	\$14,436,529	\$33,183,838	\$139,200,061
Average Spent	\$1,455.44	\$1,521.01	\$1,625.73
Spending Potential Index	130	136	146

Data Note: Consumer spending shows the amount spent on a variety of goods and services by households that reside in the area. Expenditures are shown by broad budget categories that are not mutually exclusive. Consumer spending does not equal business revenue. Total and Average Amount Spent Per Household represent annual figures. The Spending Potential Index represents the amount spent in the area relative to a national average of 100.

Source: Consumer Spending data are derived from the 2011 and 2012 Consumer Expenditure Surveys, Bureau of Labor Statistics. Esri.

Source: U.S. Census Bureau, Census 2010 Summary File 1. Esri forecasts for 2015 and 2020. Esri converted Census 2000 data into 2010 geography.

October 31, 2015



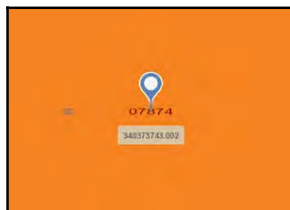
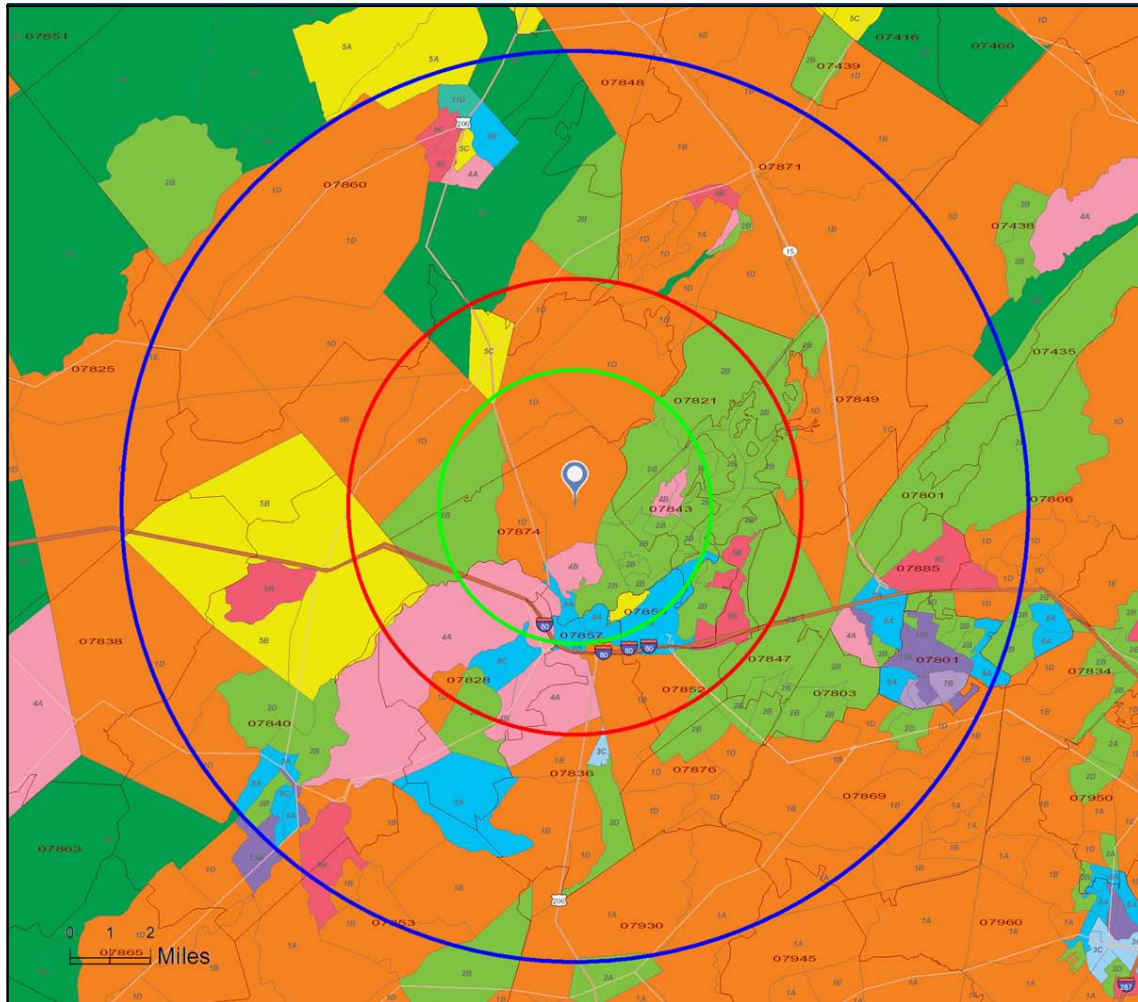
TOWNSHIP OF BYRAM Market Analysis Report



Dominant Tapestry Map

Byram 3,5,10-miles
10 Mansfield Dr, Byram Twp, New Jersey, 07874
Rings: 3, 5, 10 mile radii

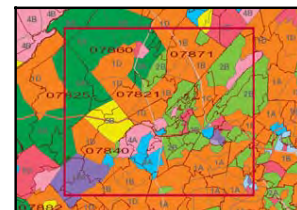
Prepared by Esri
Latitude: 40.93709
Longitude: -74.70656



Source: Esri

Tapestry LifeMode

- | | |
|------------------------|----------------------------|
| L1: Affluent Estates | L8: Middle Ground |
| L2: Upscale Avenues | L9: Senior Styles |
| L3: Uptown Individuals | L10: Rustic Outposts |
| L4: Family Landscapes | L11: Midtown Singles |
| L5: GenXurban | L12: Hometown |
| L6: Cozy Country | L13: Next Wave |
| L7: Ethnic Enclaves | L14: Scholars and Patriots |



October 31, 2015

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TOWNSHIP OF BYRAM Market Analysis Report



Dominant Tapestry Map

Byram 3,5,10-miles
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Rings: 3, 5, 10 mile radii

Prepared by Esri
Latitude: 40.93709
Longitude: -74.70656

Tapestry Segmentation

Tapestry Segmentation represents the fifth generation of market segmentation systems that began 30 years ago. The 67-segment Tapestry Segmentation system classifies U.S. neighborhoods based on their socioeconomic and demographic composition. Each segment is identified by its two-digit Segment Code. Match the two-digit segment labels on the map to the list below. Click each segment below for a detailed description.

Segment 1A (Top Tier)	Segment 8C (Bright Young Professionals)
Segment 1B (Professional Pride)	Segment 8D (Downtown Melting Pot)
Segment 1C (Boomburbs)	Segment 8E (Front Porches)
Segment 1D (Savvy Suburbanites)	Segment 8F (Old and Newcomers)
Segment 1E (Exurbanites)	Segment 8G (Hardscrabble Road)
Segment 2A (Urban Chic)	Segment 9A (Silver & Gold)
Segment 2B (Pleasantville)	Segment 9B (Golden Years)
Segment 2C (Pacific Heights)	Segment 9C (The Elders)
Segment 2D (Enterprising Professionals)	Segment 9D (Senior Escapes)
Segment 3A (Laptops and Lattes)	Segment 9E (Retirement Communities)
Segment 3B (Metro Renters)	Segment 9F (Social Security Set)
Segment 3C (Trendsetters)	Segment 10A (Southern Satellites)
Segment 4A (Soccer Moms)	Segment 10B (Rooted Rural)
Segment 4B (Home Improvement)	Segment 10C (Diners & Miners)
Segment 4C (Middleburg)	Segment 10D (Down the Road)
Segment 5A (Comfortable Empty Nesters)	Segment 10E (Rural Bypasses)
Segment 5B (In Style)	Segment 11A (City Strivers)
Segment 5C (Parks and Rec)	Segment 11B (Young and Restless)
Segment 5D (Rustbelt Traditions)	Segment 11C (Metro Fusion)
Segment 5E (Midlife Constants)	Segment 11D (Set to Impress)
Segment 6A (Green Acres)	Segment 11E (City Commons)
Segment 6B (Salt of the Earth)	Segment 12A (Family Foundations)
Segment 6C (The Great Outdoors)	Segment 12B (Traditional Living)
Segment 6D (Prairie Living)	Segment 12C (Small Town Simplicity)
Segment 6E (Rural Resort Dwellers)	Segment 12D (Modest Income Homes)
Segment 6F (Heartland Communities)	Segment 13A (International Marketplace)
Segment 7A (Up and Coming Families)	Segment 13B (Las Casas)
Segment 7B (Urban Villages)	Segment 13C (NeWest Residents)
Segment 7C (American Dreamers)	Segment 13D (Fresh Ambitions)
Segment 7D (Barrios Urbanos)	Segment 13E (High Rise Renters)
Segment 7E (Valley Growers)	Segment 14A (Military Proximity)
Segment 7F (Southwestern Families)	Segment 14B (College Towns)
Segment 8A (City Lights)	Segment 14C (Dorms to Diplomas)
Segment 8B (Emerald City)	Segment 15 (Unclassified)

Source: Esri

October 31, 2015

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TOWNSHIP OF BYRAM Market Analysis Report



Tapestry Segmentation Area Profile

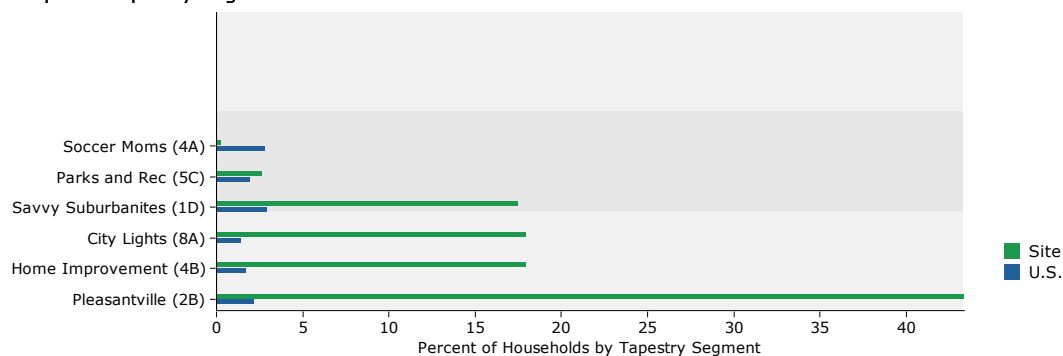
Byram 3,5,10-miles
10 Mansfield Dr, Byram Twp, New Jersey, 07874
Ring: 3 mile radius

Prepared by Esri
Latitude: 40.93709
Longitude: -74.70656

Top Twenty Tapestry Segments

Rank	Tapestry Segment	2015 Households		2015 U.S. Households		Index
		Percent	Cumulative Percent	Percent	Cumulative Percent	
1	Pleasantville (2B)	43.4%	43.4%	2.2%	2.2%	1936
2	Home Improvement (4B)	18.0%	61.4%	1.7%	3.9%	1,046
3	City Lights (8A)	18.0%	79.4%	1.5%	5.4%	1,220
4	Savvy Suburbanites (1D)	17.5%	96.9%	3.0%	8.4%	589
5	Parks and Rec (5C)	2.7%	99.6%	2.0%	10.4%	131
Subtotal		99.6%		10.4%		
6	Soccer Moms (4A)	0.4%	100.0%	2.8%	13.2%	13
Subtotal		0.4%		2.8%		
Total		100.0%		13.3%		755

Top Ten Tapestry Segments Site vs. U.S.



Data Note: This report identifies neighborhood segments in the area, and describes the socioeconomic quality of the immediate neighborhood. The index is a comparison of the percent of households or population in the area, by Tapestry segment, to the percent of households or population in the United States, by segment. An index of 100 is the US average.

Source: Esri

October 31, 2015

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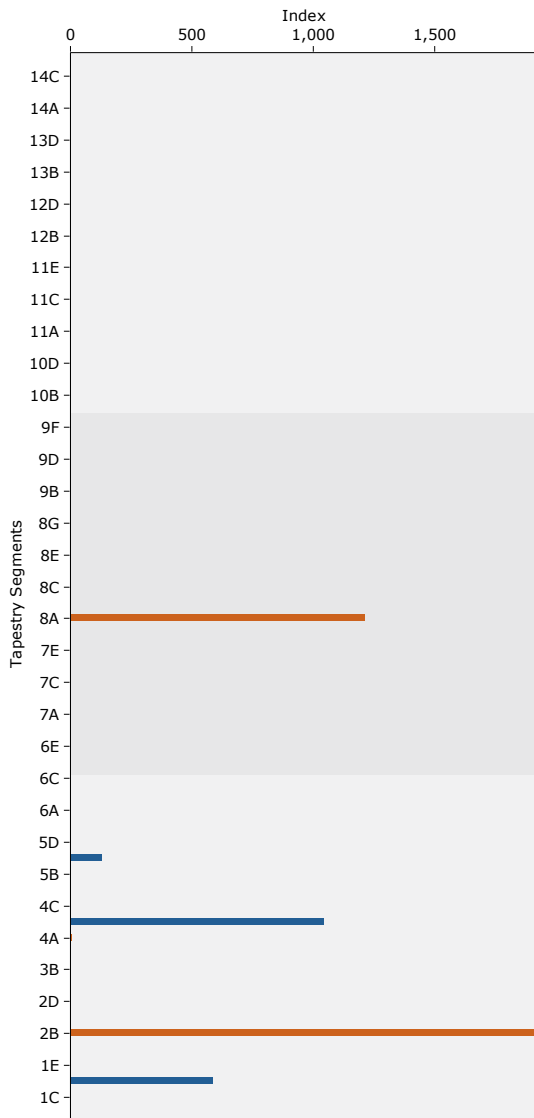


Tapestry Segmentation Area Profile

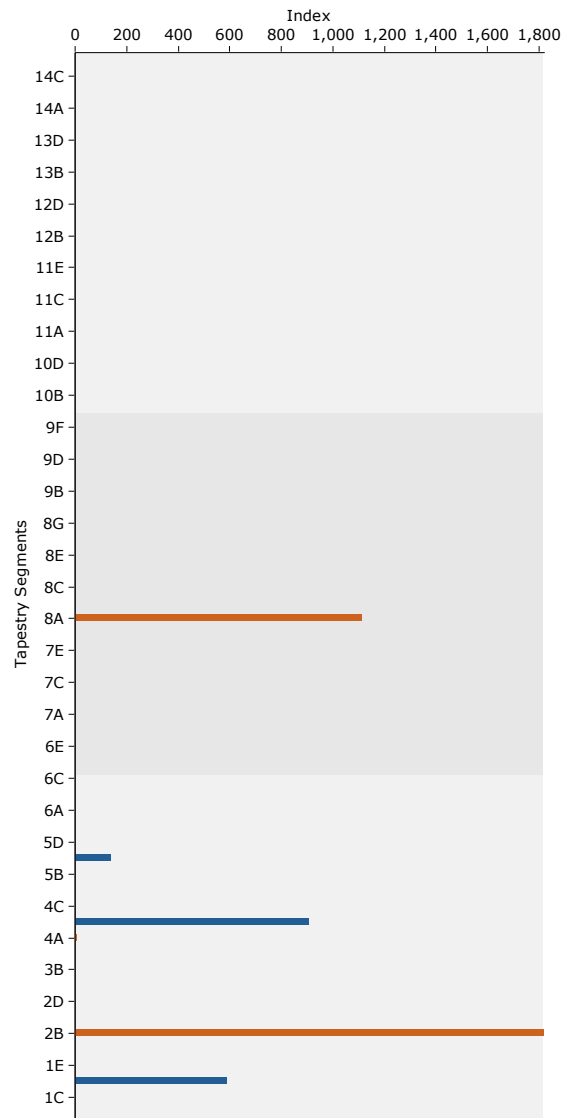
Byram 3,5,10-miles
10 Mansfield Dr, Byram Twp, New Jersey, 07874
Ring: 3 mile radius

Prepared by Esri
Latitude: 40.93709
Longitude: -74.70656

2015 Tapestry Indexes by Households



2015 Tapestry Indexes by Population



Data Note: This report identifies neighborhood segments in the area, and describes the socioeconomic quality of the immediate neighborhood. The index is a comparison of the percent of households or population in the area, by Tapestry segment, to the percent of households or population in the United States, by segment. An index of 100 is the US average.

Source: Esri

October 31, 2015



Tapestry Segmentation Area Profile

Byram 3,5,10-miles
10 Mansfield Dr, Byram Twp, New Jersey, 07874
Ring: 3 mile radius

Prepared by Esri
Latitude: 40.93709
Longitude: -74.70656

Tapestry LifeMode Groups	2015 Households			2015 Population		
	Number	Percent	Index	Number	Percent	Index
Total:	9,919	100.0%		26,249	100.0%	
1. Affluent Estates	1,740	17.5%	181	4,980	19.0%	179
Top Tier (1A)	0	0.0%	0	0	0.0%	0
Professional Pride (1B)	0	0.0%	0	0	0.0%	0
Boomburbs (1C)	0	0.0%	0	0	0.0%	0
Savvy Suburbanites (1D)	1,740	17.5%	589	4,980	19.0%	591
Exurbanites (1E)	0	0.0%	0	0	0.0%	0
2. Upscale Avenues	4,305	43.4%	766	11,738	44.7%	767
Urban Chic (2A)	0	0.0%	0	0	0.0%	0
Pleasantville (2B)	4,305	43.4%	1,936	11,738	44.7%	1,822
Pacific Heights (2C)	0	0.0%	0	0	0.0%	0
Enterprising Professionals (2D)	0	0.0%	0	0	0.0%	0
3. Uptown Individuals	0	0.0%	0	0	0.0%	0
Laptops and Lattes (3A)	0	0.0%	0	0	0.0%	0
Metro Renters (3B)	0	0.0%	0	0	0.0%	0
Trendsetters (3C)	0	0.0%	0	0	0.0%	0
4. Family Landscapes	1,823	18.4%	251	4,546	17.3%	218
Soccer Moms (4A)	35	0.4%	13	87	0.3%	10
Home Improvement (4B)	1,788	18.0%	1,046	4,459	17.0%	908
Middleburg (4C)	0	0.0%	0	0	0.0%	0
5. GenXurban	263	2.7%	23	712	2.7%	25
Comfortable Empty Nesters (5A)	0	0.0%	0	0	0.0%	0
In Style (5B)	0	0.0%	0	0	0.0%	0
Parks and Rec (5C)	263	2.7%	131	712	2.7%	141
Rustbelt Traditions (5D)	0	0.0%	0	0	0.0%	0
Midlife Constants (5E)	0	0.0%	0	0	0.0%	0
6. Cozy Country Living	0	0.0%	0	0	0.0%	0
Green Acres (6A)	0	0.0%	0	0	0.0%	0
Salt of the Earth (6B)	0	0.0%	0	0	0.0%	0
The Great Outdoors (6C)	0	0.0%	0	0	0.0%	0
Prairie Living (6D)	0	0.0%	0	0	0.0%	0
Rural Resort Dwellers (6E)	0	0.0%	0	0	0.0%	0
Heartland Communities (6F)	0	0.0%	0	0	0.0%	0
7. Ethnic Enclaves	0	0.0%	0	0	0.0%	0
Up and Coming Families (7A)	0	0.0%	0	0	0.0%	0
Urban Villages (7B)	0	0.0%	0	0	0.0%	0
American Dreamers (7C)	0	0.0%	0	0	0.0%	0
Barrios Urbanos (7D)	0	0.0%	0	0	0.0%	0
Valley Growers (7E)	0	0.0%	0	0	0.0%	0
Southwestern Families (7F)	0	0.0%	0	0	0.0%	0

Data Note: This report identifies neighborhood segments in the area, and describes the socioeconomic quality of the immediate neighborhood. The index is a comparison of the percent of households or population in the area, by Tapestry segment, to the percent of households or population in the United States, by segment. An index of 100 is the US average.

Source: Esri

October 31, 2015



TOWNSHIP OF BYRAM Market Analysis Report



Tapestry Segmentation Area Profile

Byram 3,5,10-miles
10 Mansfield Dr, Byram Twp, New Jersey, 07874
Ring: 3 mile radius

Prepared by Esri
Latitude: 40.93709
Longitude: -74.70656

Tapestry LifeMode Groups	2015 Households			2015 Population		
	Number	Percent	Index	Number	Percent	Index
Total:	9,919	100.0%		26,249	100.0%	
8. Middle Ground	1,788	18.0%	165	4,273	16.3%	162
City Lights (8A)	1,788	18.0%	1,220	4,273	16.3%	1,115
Emerald City (8B)	0	0.0%	0	0	0.0%	0
Bright Young Professionals (8C)	0	0.0%	0	0	0.0%	0
Downtown Melting Pot (8D)	0	0.0%	0	0	0.0%	0
Front Porches (8E)	0	0.0%	0	0	0.0%	0
Old and Newcomers (8F)	0	0.0%	0	0	0.0%	0
Hardscrabble Road (8G)	0	0.0%	0	0	0.0%	0
9. Senior Styles	0	0.0%	0	0	0.0%	0
Silver & Gold (9A)	0	0.0%	0	0	0.0%	0
Golden Years (9B)	0	0.0%	0	0	0.0%	0
The Elders (9C)	0	0.0%	0	0	0.0%	0
Senior Escapes (9D)	0	0.0%	0	0	0.0%	0
Retirement Communities (9E)	0	0.0%	0	0	0.0%	0
Social Security Set (9F)	0	0.0%	0	0	0.0%	0
10. Rustic Outposts	0	0.0%	0	0	0.0%	0
Southern Satellites (10A)	0	0.0%	0	0	0.0%	0
Rooted Rural (10B)	0	0.0%	0	0	0.0%	0
Diners & Miners (10C)	0	0.0%	0	0	0.0%	0
Down the Road (10D)	0	0.0%	0	0	0.0%	0
Rural Bypasses (10E)	0	0.0%	0	0	0.0%	0
11. Midtown Singles	0	0.0%	0	0	0.0%	0
City Strivers (11A)	0	0.0%	0	0	0.0%	0
Young and Restless (11B)	0	0.0%	0	0	0.0%	0
Metro Fusion (11C)	0	0.0%	0	0	0.0%	0
Set to Impress (11D)	0	0.0%	0	0	0.0%	0
City Commons (11E)	0	0.0%	0	0	0.0%	0
12. Hometown	0	0.0%	0	0	0.0%	0
Family Foundations (12A)	0	0.0%	0	0	0.0%	0
Traditional Living (12B)	0	0.0%	0	0	0.0%	0
Small Town Simplicity (12C)	0	0.0%	0	0	0.0%	0
Modest Income Homes (12D)	0	0.0%	0	0	0.0%	0
13. Next Wave	0	0.0%	0	0	0.0%	0
International Marketplace (13A)	0	0.0%	0	0	0.0%	0
Las Casas (13B)	0	0.0%	0	0	0.0%	0
NeWest Residents (13C)	0	0.0%	0	0	0.0%	0
Fresh Ambitions (13D)	0	0.0%	0	0	0.0%	0
High Rise Renters (13E)	0	0.0%	0	0	0.0%	0
14. Scholars and Patriots	0	0.0%	0	0	0.0%	0
Military Proximity (14A)	0	0.0%	0	0	0.0%	0
College Towns (14B)	0	0.0%	0	0	0.0%	0
Dorms to Diplomas (14C)	0	0.0%	0	0	0.0%	0
Unclassified (15)	0	0.0%	0	0	0.0%	0

Data Note: This report identifies neighborhood segments in the area, and describes the socioeconomic quality of the immediate neighborhood. The index is a comparison of the percent of households or population in the area, by Tapestry segment, to the percent of households or population in the United States, by segment. An index of 100 is the US average.

Source: Esri

October 31, 2015



TOWNSHIP OF BYRAM

Market Analysis Report



Tapestry Segmentation Area Profile

Byram 3,5,10-miles
10 Mansfield Dr, Byram Twp, New Jersey, 07874
Ring: 3 mile radius

Prepared by Esri
Latitude: 40.93709
Longitude: -74.70656

Tapestry Urbanization Groups	2015 Households			2015 Population		
	Number	Percent	Index	Number	Percent	Index
Total:	9,919	100.0%		26,249	100.0%	
1. Principal Urban Center	0	0.0%	0	0	0.0%	0
Laptops and Lattes (3A)	0	0.0%	0	0	0.0%	0
Metro Renters (3B)	0	0.0%	0	0	0.0%	0
Trendsetters (3C)	0	0.0%	0	0	0.0%	0
Downtown Melting Pot (8D)	0	0.0%	0	0	0.0%	0
City Strivers (11A)	0	0.0%	0	0	0.0%	0
NeWest Residents (13C)	0	0.0%	0	0	0.0%	0
Fresh Ambitions (13D)	0	0.0%	0	0	0.0%	0
High Rise Renters (13E)	0	0.0%	0	0	0.0%	0
2. Urban Periphery	1,788	18.0%	107	4,273	16.3%	87
Pacific Heights (2C)	0	0.0%	0	0	0.0%	0
Rustbelt Traditions (5D)	0	0.0%	0	0	0.0%	0
Urban Villages (7B)	0	0.0%	0	0	0.0%	0
American Dreamers (7C)	0	0.0%	0	0	0.0%	0
Barrios Urbanos (7D)	0	0.0%	0	0	0.0%	0
Southwestern Families (7F)	0	0.0%	0	0	0.0%	0
City Lights (8A)	1,788	18.0%	1,220	4,273	16.3%	1,115
Bright Young Professionals (8C)	0	0.0%	0	0	0.0%	0
Metro Fusion (11C)	0	0.0%	0	0	0.0%	0
Family Foundations (12A)	0	0.0%	0	0	0.0%	0
Modest Income Homes (12D)	0	0.0%	0	0	0.0%	0
International Marketplace (13A)	0	0.0%	0	0	0.0%	0
Las Casas (13B)	0	0.0%	0	0	0.0%	0
3. Metro Cities	0	0.0%	0	0	0.0%	0
In Style (5B)	0	0.0%	0	0	0.0%	0
Emerald City (8B)	0	0.0%	0	0	0.0%	0
Front Porches (8E)	0	0.0%	0	0	0.0%	0
Old and Newcomers (8F)	0	0.0%	0	0	0.0%	0
Hardscrabble Road (8G)	0	0.0%	0	0	0.0%	0
Retirement Communities (9E)	0	0.0%	0	0	0.0%	0
Social Security Set (9F)	0	0.0%	0	0	0.0%	0
Young and Restless (11B)	0	0.0%	0	0	0.0%	0
Set to Impress (11D)	0	0.0%	0	0	0.0%	0
City Commons (11E)	0	0.0%	0	0	0.0%	0
Traditional Living (12B)	0	0.0%	0	0	0.0%	0
College Towns (14B)	0	0.0%	0	0	0.0%	0
Dorms to Diplomas (14C)	0	0.0%	0	0	0.0%	0

Data Note: This report identifies neighborhood segments in the area, and describes the socioeconomic quality of the immediate neighborhood. The index is a comparison of the percent of households or population in the area, by Tapestry segment, to the percent of households or population in the United States, by segment. An index of 100 is the US average.

Source: Esri

October 31, 2015



TOWNSHIP OF BYRAM Market Analysis Report



Tapestry Segmentation Area Profile

Byram 3,5,10-miles
10 Mansfield Dr, Byram Twp, New Jersey, 07874
Ring: 3 mile radius

Prepared by Esri
Latitude: 40.93709
Longitude: -74.70656

Tapestry Urbanization Groups	2015 Households			2015 Population		
	Number	Percent	Index	Number	Percent	Index
Total:	9,919	100.0%		26,249	100.0%	
4. Suburban Periphery	8,131	82.0%	261	21,976	83.7%	260
Top Tier (1A)	0	0.0%	0	0	0.0%	0
Professional Pride (1B)	0	0.0%	0	0	0.0%	0
Boomburbs (1C)	0	0.0%	0	0	0.0%	0
Savvy Suburbanites (1D)	1,740	17.5%	589	4,980	19.0%	591
Exurbanites (1E)	0	0.0%	0	0	0.0%	0
Urban Chic (2A)	0	0.0%	0	0	0.0%	0
Pleasantville (2B)	4,305	43.4%	1,936	11,738	44.7%	1,822
Enterprising Professionals (2D)	0	0.0%	0	0	0.0%	0
Soccer Moms (4A)	35	0.4%	13	87	0.3%	10
Home Improvement (4B)	1,788	18.0%	1,046	4,459	17.0%	908
Comfortable Empty Nesters (5A)	0	0.0%	0	0	0.0%	0
Parks and Rec (5C)	263	2.7%	131	712	2.7%	141
Midlife Constants (5E)	0	0.0%	0	0	0.0%	0
Up and Coming Families (7A)	0	0.0%	0	0	0.0%	0
Silver & Gold (9A)	0	0.0%	0	0	0.0%	0
Golden Years (9B)	0	0.0%	0	0	0.0%	0
The Elders (9C)	0	0.0%	0	0	0.0%	0
Military Proximity (14A)	0	0.0%	0	0	0.0%	0
5. Semirural	0	0.0%	0	0	0.0%	0
Middleburg (4C)	0	0.0%	0	0	0.0%	0
Heartland Communities (6F)	0	0.0%	0	0	0.0%	0
Valley Growers (7E)	0	0.0%	0	0	0.0%	0
Senior Escapes (9D)	0	0.0%	0	0	0.0%	0
Down the Road (10D)	0	0.0%	0	0	0.0%	0
Small Town Simplicity (12C)	0	0.0%	0	0	0.0%	0
6. Rural	0	0.0%	0	0	0.0%	0
Green Acres (6A)	0	0.0%	0	0	0.0%	0
Salt of the Earth (6B)	0	0.0%	0	0	0.0%	0
The Great Outdoors (6C)	0	0.0%	0	0	0.0%	0
Prairie Living (6D)	0	0.0%	0	0	0.0%	0
Rural Resort Dwellers (6E)	0	0.0%	0	0	0.0%	0
Southern Satellites (10A)	0	0.0%	0	0	0.0%	0
Rooted Rural (10B)	0	0.0%	0	0	0.0%	0
Diners & Miners (10C)	0	0.0%	0	0	0.0%	0
Rural Bypasses (10E)	0	0.0%	0	0	0.0%	0
Unclassified (15)	0	0.0%	0	0	0.0%	0

Data Note: This report identifies neighborhood segments in the area, and describes the socioeconomic quality of the immediate neighborhood. The index is a comparison of the percent of households or population in the area, by Tapestry segment, to the percent of households or population in the United States, by segment. An index of 100 is the US average.

Source: Esri

October 31, 2015



TOWNSHIP OF BYRAM

Market Analysis Report



Tapestry Segmentation Area Profile

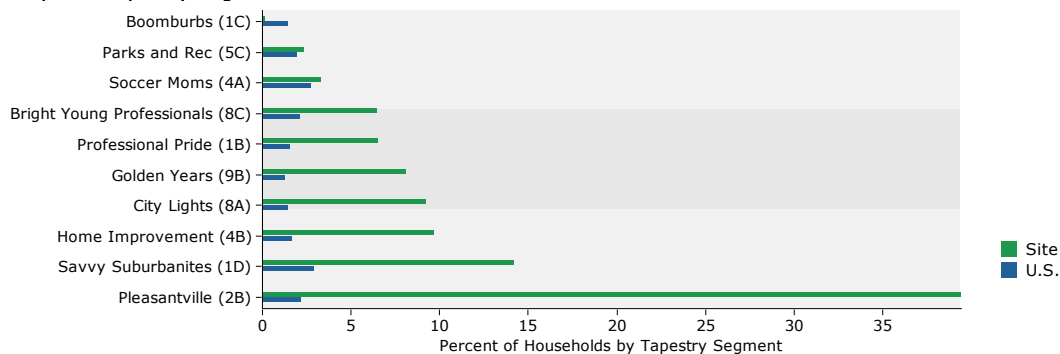
Byram 3,5,10-miles
10 Mansfield Dr, Byram Twp, New Jersey, 07874
Ring: 5 mile radius

Prepared by Esri
Latitude: 40.93709
Longitude: -74.70656

Top Twenty Tapestry Segments

		2015 Households		2015 U.S. Households		
		Cumulative		Cumulative		
Rank	Tapestry Segment	Percent	Percent	Percent	Percent	Index
1	Pleasantville (2B)	39.5%	39.5%	2.2%	2.2%	1761
2	Savvy Suburbanites (1D)	14.2%	53.7%	3.0%	5.2%	477
3	Home Improvement (4B)	9.7%	63.4%	1.7%	6.9%	565
4	City Lights (8A)	9.3%	72.7%	1.5%	8.4%	628
5	Golden Years (9B)	8.2%	80.9%	1.3%	9.7%	610
	Subtotal	80.9%		9.7%		
6	Professional Pride (1B)	6.6%	87.5%	1.6%	11.3%	415
7	Bright Young Professionals (8C)	6.5%	94.0%	2.2%	13.5%	297
8	Soccer Moms (4A)	3.3%	97.3%	2.8%	16.3%	118
9	Parks and Rec (5C)	2.4%	99.7%	2.0%	18.3%	119
10	Boomburbs (1C)	0.2%	99.9%	1.5%	19.8%	15
	Subtotal	19.0%		10.1%		
11	In Style (5B)	0.0%	99.9%	2.3%	22.1%	1
12	Enterprising Professionals (2D)	0.0%	99.9%	1.4%	23.5%	1
13	Green Acres (6A)	0.0%	99.9%	3.2%	26.7%	1
Total		100.0%		26.7%		375

Top Ten Tapestry Segments Site vs. U.S.



Data Note: This report identifies neighborhood segments in the area, and describes the socioeconomic quality of the immediate neighborhood. The index is a comparison of the percent of households or population in the area, by Tapestry segment, to the percent of households or population in the United States, by segment. An index of 100 is the US average.

Source: Esri

October 31, 2015

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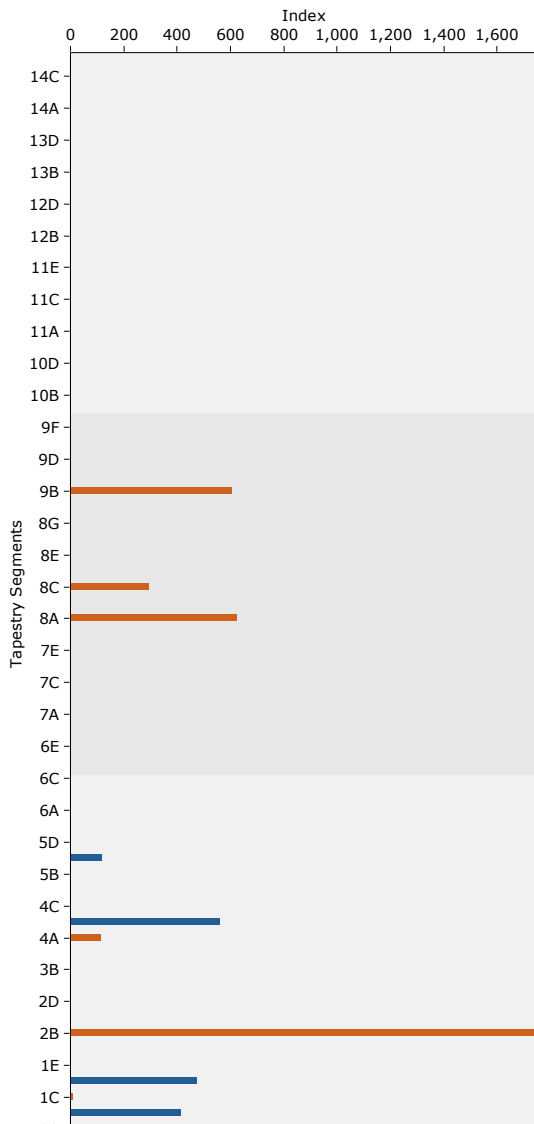


Tapestry Segmentation Area Profile

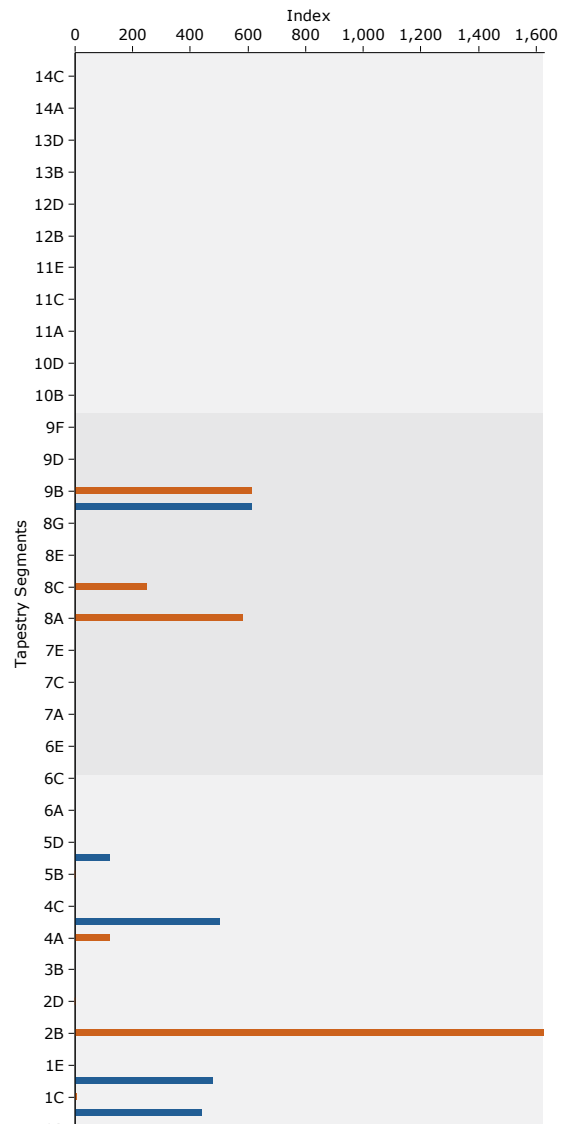
Byram 3,5,10-miles
10 Mansfield Dr, Byram Twp, New Jersey, 07874
Ring: 5 mile radius

Prepared by Esri
Latitude: 40.93709
Longitude: -74.70656

2015 Tapestry Indexes by Households



2015 Tapestry Indexes by Population



Data Note: This report identifies neighborhood segments in the area, and describes the socioeconomic quality of the immediate neighborhood. The index is a comparison of the percent of households or population in the area, by Tapestry segment, to the percent of households or population in the United States, by segment. An index of 100 is the US average.

Source: Esri

October 31, 2015



TOWNSHIP OF BYRAM Market Analysis Report



Tapestry Segmentation Area Profile

Byram 3,5,10-miles
10 Mansfield Dr, Byram Twp, New Jersey, 07874
Ring: 5 mile radius

Prepared by Esri
Latitude: 40.93709
Longitude: -74.70656

Tapestry LifeMode Groups	2015 Households			2015 Population		
	Number	Percent	Index	Number	Percent	Index
Total:	21,817	100.0%		56,895	100.0%	
1. Affluent Estates	4,586	21.0%	216	13,595	23.9%	225
Top Tier (1A)	0	0.0%	0	0	0.0%	0
Professional Pride (1B)	1,436	6.6%	415	4,702	8.3%	440
Boomburbs (1C)	48	0.2%	15	115	0.2%	11
Savvy Suburbanites (1D)	3,102	14.2%	477	8,778	15.4%	480
Exurbanites (1E)	0	0.0%	0	0	0.0%	0
2. Upscale Avenues	8,614	39.5%	697	22,777	40.0%	686
Urban Chic (2A)	0	0.0%	0	0	0.0%	0
Pleasantville (2B)	8,610	39.5%	1,761	22,767	40.0%	1,630
Pacific Heights (2C)	0	0.0%	0	0	0.0%	0
Enterprising Professionals (2D)	4	0.0%	1	10	0.0%	1
3. Uptown Individuals	0	0.0%	0	0	0.0%	0
Laptops and Lattes (3A)	0	0.0%	0	0	0.0%	0
Metro Renters (3B)	0	0.0%	0	0	0.0%	0
Trendsetters (3C)	0	0.0%	0	0	0.0%	0
4. Family Landscapes	2,848	13.1%	178	7,616	13.4%	168
Soccer Moms (4A)	725	3.3%	118	2,233	3.9%	124
Home Improvement (4B)	2,123	9.7%	565	5,383	9.5%	506
Middleburg (4C)	0	0.0%	0	0	0.0%	0
5. GenXurban	529	2.4%	21	1,376	2.4%	23
Comfortable Empty Nesters (5A)	0	0.0%	0	0	0.0%	0
In Style (5B)	6	0.0%	1	15	0.0%	1
Parks and Rec (5C)	523	2.4%	119	1,361	2.4%	124
Rustbelt Traditions (5D)	0	0.0%	0	0	0.0%	0
Midlife Constants (5E)	0	0.0%	0	0	0.0%	0
6. Cozy Country Living	4	0.0%	0	7	0.0%	0
Green Acres (6A)	4	0.0%	1	7	0.0%	0
Salt of the Earth (6B)	0	0.0%	0	0	0.0%	0
The Great Outdoors (6C)	0	0.0%	0	0	0.0%	0
Prairie Living (6D)	0	0.0%	0	0	0.0%	0
Rural Resort Dwellers (6E)	0	0.0%	0	0	0.0%	0
Heartland Communities (6F)	0	0.0%	0	0	0.0%	0
7. Ethnic Enclaves	0	0.0%	0	0	0.0%	0
Up and Coming Families (7A)	0	0.0%	0	0	0.0%	0
Urban Villages (7B)	0	0.0%	0	0	0.0%	0
American Dreamers (7C)	0	0.0%	0	0	0.0%	0
Barrios Urbanos (7D)	0	0.0%	0	0	0.0%	0
Valley Growers (7E)	0	0.0%	0	0	0.0%	0
Southwestern Families (7F)	0	0.0%	0	0	0.0%	0

Data Note: This report identifies neighborhood segments in the area, and describes the socioeconomic quality of the immediate neighborhood. The index is a comparison of the percent of households or population in the area, by Tapestry segment, to the percent of households or population in the United States, by segment. An index of 100 is the US average.

Source: Esri

October 31, 2015



TOWNSHIP OF BYRAM Market Analysis Report



Tapestry Segmentation Area Profile

Byram 3,5,10-miles
10 Mansfield Dr, Byram Twp, New Jersey, 07874
Ring: 5 mile radius

Prepared by Esri
Latitude: 40.93709
Longitude: -74.70656

Tapestry LifeMode Groups	2015 Households			2015 Population		
	Number	Percent	Index	Number	Percent	Index
Total:	21,817	100.0%		56,895	100.0%	
8. Middle Ground	3,448	15.8%	145	7,728	13.6%	135
City Lights (8A)	2,023	9.3%	628	4,861	8.5%	585
Emerald City (8B)	0	0.0%	0	0	0.0%	0
Bright Young Professionals (8C)	1,425	6.5%	297	2,867	5.0%	251
Downtown Melting Pot (8D)	0	0.0%	0	0	0.0%	0
Front Porches (8E)	0	0.0%	0	0	0.0%	0
Old and Newcomers (8F)	0	0.0%	0	0	0.0%	0
Hardscrabble Road (8G)	0	0.0%	0	0	0.0%	0
9. Senior Styles	1,788	8.2%	142	3,796	6.7%	151
Silver & Gold (9A)	0	0.0%	0	0	0.0%	0
Golden Years (9B)	1,788	8.2%	610	3,796	6.7%	617
The Elders (9C)	0	0.0%	0	0	0.0%	0
Senior Escapes (9D)	0	0.0%	0	0	0.0%	0
Retirement Communities (9E)	0	0.0%	0	0	0.0%	0
Social Security Set (9F)	0	0.0%	0	0	0.0%	0
10. Rustic Outposts	0	0.0%	0	0	0.0%	0
Southern Satellites (10A)	0	0.0%	0	0	0.0%	0
Rooted Rural (10B)	0	0.0%	0	0	0.0%	0
Diners & Miners (10C)	0	0.0%	0	0	0.0%	0
Down the Road (10D)	0	0.0%	0	0	0.0%	0
Rural Bypasses (10E)	0	0.0%	0	0	0.0%	0
11. Midtown Singles	0	0.0%	0	0	0.0%	0
City Strivers (11A)	0	0.0%	0	0	0.0%	0
Young and Restless (11B)	0	0.0%	0	0	0.0%	0
Metro Fusion (11C)	0	0.0%	0	0	0.0%	0
Set to Impress (11D)	0	0.0%	0	0	0.0%	0
City Commons (11E)	0	0.0%	0	0	0.0%	0
12. Hometown	0	0.0%	0	0	0.0%	0
Family Foundations (12A)	0	0.0%	0	0	0.0%	0
Traditional Living (12B)	0	0.0%	0	0	0.0%	0
Small Town Simplicity (12C)	0	0.0%	0	0	0.0%	0
Modest Income Homes (12D)	0	0.0%	0	0	0.0%	0
13. Next Wave	0	0.0%	0	0	0.0%	0
International Marketplace (13A)	0	0.0%	0	0	0.0%	0
Las Casas (13B)	0	0.0%	0	0	0.0%	0
NeWest Residents (13C)	0	0.0%	0	0	0.0%	0
Fresh Ambitions (13D)	0	0.0%	0	0	0.0%	0
High Rise Renters (13E)	0	0.0%	0	0	0.0%	0
14. Scholars and Patriots	0	0.0%	0	0	0.0%	0
Military Proximity (14A)	0	0.0%	0	0	0.0%	0
College Towns (14B)	0	0.0%	0	0	0.0%	0
Dorms to Diplomas (14C)	0	0.0%	0	0	0.0%	0
Unclassified (15)	0	0.0%	0	0	0.0%	0

Data Note: This report identifies neighborhood segments in the area, and describes the socioeconomic quality of the immediate neighborhood. The index is a comparison of the percent of households or population in the area, by Tapestry segment, to the percent of households or population in the United States, by segment. An index of 100 is the US average.

Source: Esri

October 31, 2015



TOWNSHIP OF BYRAM Market Analysis Report

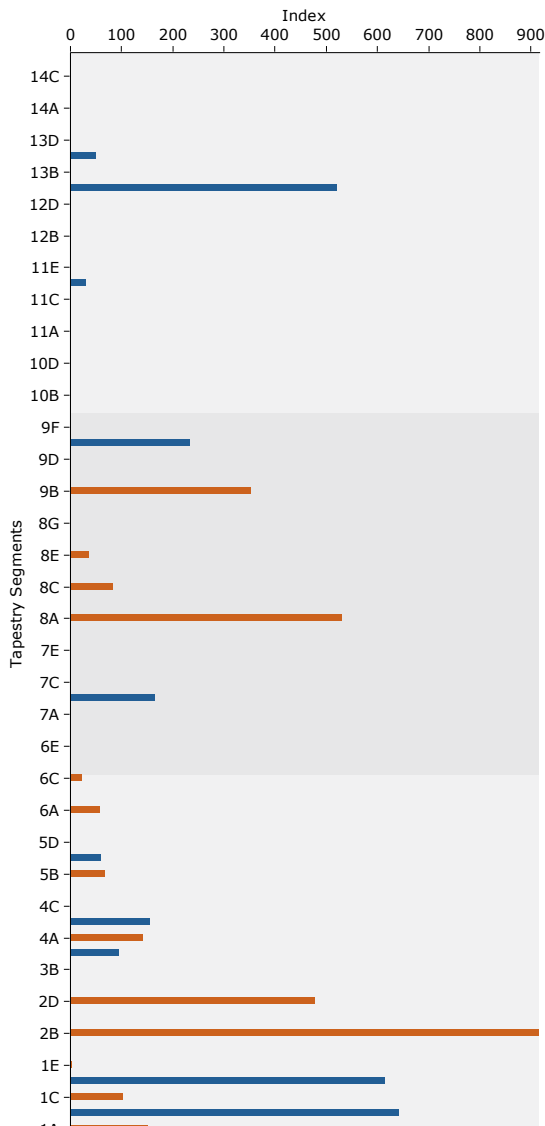


Tapestry Segmentation Area Profile

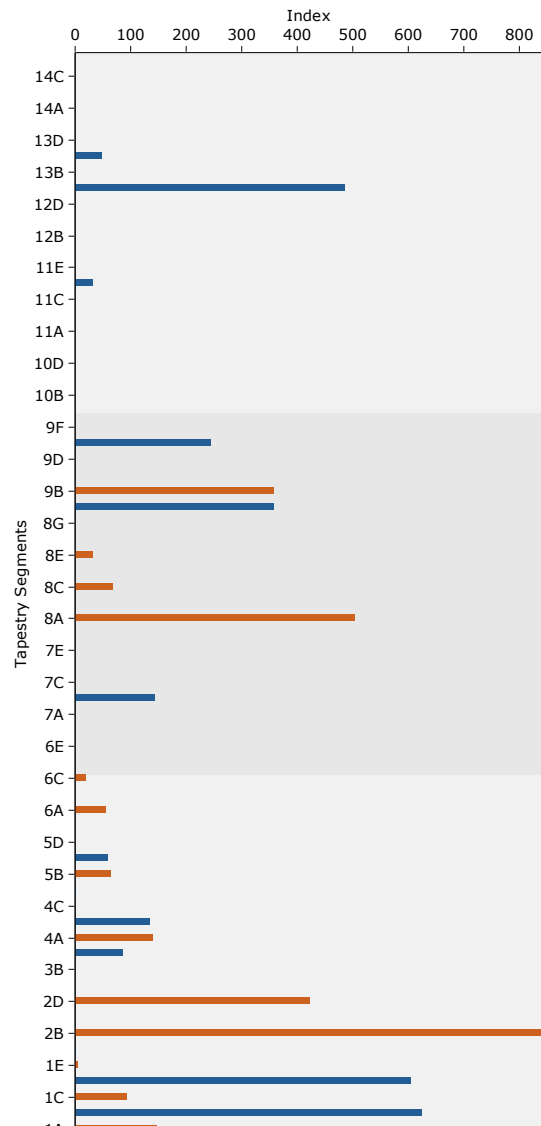
Byram 3,5,10-miles
10 Mansfield Dr, Byram Twp, New Jersey, 07874
Ring: 10 mile radius

Prepared by Esri
Latitude: 40.93709
Longitude: -74.70656

2015 Tapestry Indexes by Households



2015 Tapestry Indexes by Population



Data Note: This report identifies neighborhood segments in the area, and describes the socioeconomic quality of the immediate neighborhood. The index is a comparison of the percent of households or population in the area, by Tapestry segment, to the percent of households or population in the United States, by segment. An index of 100 is the US average.

Source: Esri

October 31, 2015



TOWNSHIP OF BYRAM Market Analysis Report



Tapestry Segmentation Area Profile

Byram 3,5,10-miles
10 Mansfield Dr, Byram Twp, New Jersey, 07874
Ring: 5 mile radius

Prepared by Esri
Latitude: 40.93709
Longitude: -74.70656

Tapestry Urbanization Groups	2015 Households			2015 Population		
	Number	Percent	Index	Number	Percent	Index
Total:	21,817	100.0%		56,895	100.0%	
1. Principal Urban Center	0	0.0%	0	0	0.0%	0
Laptops and Lattes (3A)	0	0.0%	0	0	0.0%	0
Metro Renters (3B)	0	0.0%	0	0	0.0%	0
Trendsetters (3C)	0	0.0%	0	0	0.0%	0
Downtown Melting Pot (8D)	0	0.0%	0	0	0.0%	0
City Strivers (11A)	0	0.0%	0	0	0.0%	0
NeWest Residents (13C)	0	0.0%	0	0	0.0%	0
Fresh Ambitions (13D)	0	0.0%	0	0	0.0%	0
High Rise Renters (13E)	0	0.0%	0	0	0.0%	0
2. Urban Periphery	3,448	15.8%	94	7,728	13.6%	73
Pacific Heights (2C)	0	0.0%	0	0	0.0%	0
Rustbelt Traditions (5D)	0	0.0%	0	0	0.0%	0
Urban Villages (7B)	0	0.0%	0	0	0.0%	0
American Dreamers (7C)	0	0.0%	0	0	0.0%	0
Barrios Urbanos (7D)	0	0.0%	0	0	0.0%	0
Southwestern Families (7F)	0	0.0%	0	0	0.0%	0
City Lights (8A)	2,023	9.3%	628	4,861	8.5%	585
Bright Young Professionals (8C)	1,425	6.5%	297	2,867	5.0%	251
Metro Fusion (11C)	0	0.0%	0	0	0.0%	0
Family Foundations (12A)	0	0.0%	0	0	0.0%	0
Modest Income Homes (12D)	0	0.0%	0	0	0.0%	0
International Marketplace (13A)	0	0.0%	0	0	0.0%	0
Las Casas (13B)	0	0.0%	0	0	0.0%	0
3. Metro Cities	6	0.0%	0	15	0.0%	0
In Style (5B)	6	0.0%	1	15	0.0%	1
Emerald City (8B)	0	0.0%	0	0	0.0%	0
Front Porches (8E)	0	0.0%	0	0	0.0%	0
Old and Newcomers (8F)	0	0.0%	0	0	0.0%	0
Hardscrabble Road (8G)	0	0.0%	0	0	0.0%	0
Retirement Communities (9E)	0	0.0%	0	0	0.0%	0
Social Security Set (9F)	0	0.0%	0	0	0.0%	0
Young and Restless (11B)	0	0.0%	0	0	0.0%	0
Set to Impress (11D)	0	0.0%	0	0	0.0%	0
City Commons (11E)	0	0.0%	0	0	0.0%	0
Traditional Living (12B)	0	0.0%	0	0	0.0%	0
College Towns (14B)	0	0.0%	0	0	0.0%	0
Dorms to Diplomas (14C)	0	0.0%	0	0	0.0%	0

Data Note: This report identifies neighborhood segments in the area, and describes the socioeconomic quality of the immediate neighborhood. The index is a comparison of the percent of households or population in the area, by Tapestry segment, to the percent of households or population in the United States, by segment. An index of 100 is the US average.

Source: Esri

October 31, 2015



TOWNSHIP OF BYRAM Market Analysis Report



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Byram 3,5,10-miles
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Ring: 5 mile radius

Prepared by Esri
Latitude: 40.93709
Longitude: -74.70656

Tapestry Urbanization Groups	2015 Households			2015 Population		
	Number	Percent	Index	Number	Percent	Index
Total:	21,817	100.0%		56,895	100.0%	
4. Suburban Periphery	18,359	84.1%	268	49,145	86.4%	268
Top Tier (1A)	0	0.0%	0	0	0.0%	0
Professional Pride (1B)	1,436	6.6%	415	4,702	8.3%	440
Boomburbs (1C)	48	0.2%	15	115	0.2%	11
Savvy Suburbanites (1D)	3,102	14.2%	477	8,778	15.4%	480
Exurbanites (1E)	0	0.0%	0	0	0.0%	0
Urban Chic (2A)	0	0.0%	0	0	0.0%	0
Pleasantville (2B)	8,610	39.5%	1,761	22,767	40.0%	1,630
Enterprising Professionals (2D)	4	0.0%	1	10	0.0%	1
Soccer Moms (4A)	725	3.3%	118	2,233	3.9%	124
Home Improvement (4B)	2,123	9.7%	565	5,383	9.5%	506
Comfortable Empty Nesters (5A)	0	0.0%	0	0	0.0%	0
Parks and Rec (5C)	523	2.4%	119	1,361	2.4%	124
Midlife Constants (5E)	0	0.0%	0	0	0.0%	0
Up and Coming Families (7A)	0	0.0%	0	0	0.0%	0
Silver & Gold (9A)	0	0.0%	0	0	0.0%	0
Golden Years (9B)	1,788	8.2%	610	3,796	6.7%	617
The Elders (9C)	0	0.0%	0	0	0.0%	0
Military Proximity (14A)	0	0.0%	0	0	0.0%	0
5. Semirural	0	0.0%	0	0	0.0%	0
Middleburg (4C)	0	0.0%	0	0	0.0%	0
Heartland Communities (6F)	0	0.0%	0	0	0.0%	0
Valley Growers (7E)	0	0.0%	0	0	0.0%	0
Senior Escapes (9D)	0	0.0%	0	0	0.0%	0
Down the Road (10D)	0	0.0%	0	0	0.0%	0
Small Town Simplicity (12C)	0	0.0%	0	0	0.0%	0
6. Rural	4	0.0%	0	7	0.0%	0
Green Acres (6A)	4	0.0%	1	7	0.0%	0
Salt of the Earth (6B)	0	0.0%	0	0	0.0%	0
The Great Outdoors (6C)	0	0.0%	0	0	0.0%	0
Prairie Living (6D)	0	0.0%	0	0	0.0%	0
Rural Resort Dwellers (6E)	0	0.0%	0	0	0.0%	0
Southern Satellites (10A)	0	0.0%	0	0	0.0%	0
Rooted Rural (10B)	0	0.0%	0	0	0.0%	0
Diners & Miners (10C)	0	0.0%	0	0	0.0%	0
Rural Bypasses (10E)	0	0.0%	0	0	0.0%	0
Unclassified (15)	0	0.0%	0	0	0.0%	0

Data Note: This report identifies neighborhood segments in the area, and describes the socioeconomic quality of the immediate neighborhood. The index is a comparison of the percent of households or population in the area, by Tapestry segment, to the percent of households or population in the United States, by segment. An index of 100 is the US average.

Source: Esri

October 31, 2015



TOWNSHIP OF BYRAM Market Analysis Report



Tapestry Segmentation Area Profile

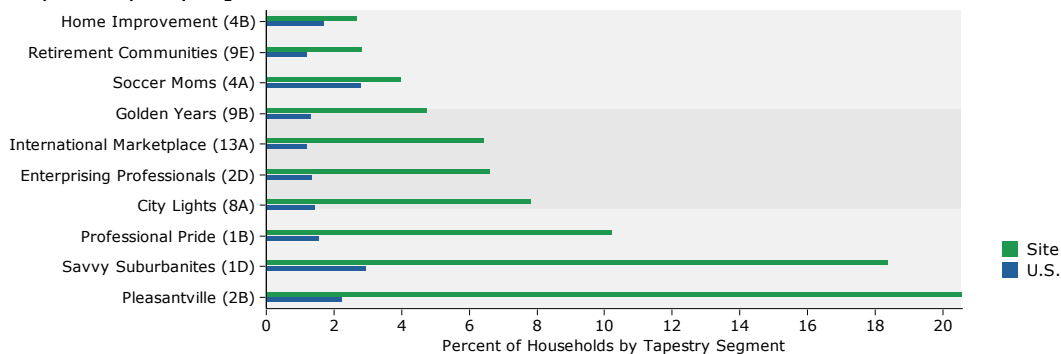
Byram 3,5,10-miles
10 Mansfield Dr, Byram Twp, New Jersey, 07874
Ring: 10 mile radius

Prepared by Esri
Latitude: 40.93709
Longitude: -74.70656

Top Twenty Tapestry Segments

Rank	Tapestry Segment	2015 Households		2015 U.S. Households		Index
		Percent	Cumulative Percent	Percent	Cumulative Percent	
1	Pleasantville (2B)	20.6%	20.6%	2.2%	2.2%	918
2	Savvy Suburbanites (1D)	18.4%	39.0%	3.0%	5.2%	617
3	Professional Pride (1B)	10.2%	49.2%	1.6%	6.8%	644
4	City Lights (8A)	7.9%	57.1%	1.5%	8.3%	532
5	Enterprising Professionals (2D)	6.6%	63.7%	1.4%	9.7%	481
Subtotal		63.7%		9.7%		
6	International Marketplace (13A)	6.4%	70.1%	1.2%	10.9%	523
7	Golden Years (9B)	4.8%	74.9%	1.3%	12.2%	355
8	Soccer Moms (4A)	4.0%	78.9%	2.8%	15.0%	143
9	Retirement Communities (9E)	2.8%	81.7%	1.2%	16.2%	235
10	Home Improvement (4B)	2.7%	84.4%	1.7%	17.9%	156
Subtotal		20.7%		8.2%		
11	Top Tier (1A)	2.6%	87.0%	1.7%	19.6%	153
12	Green Acres (6A)	1.9%	88.9%	3.2%	22.8%	59
13	Bright Young Professionals (8C)	1.8%	90.7%	2.2%	25.0%	84
14	Urban Villages (7B)	1.8%	92.5%	1.1%	26.1%	167
15	In Style (5B)	1.6%	94.1%	2.3%	28.4%	70
Subtotal		9.7%		10.5%		
16	Boomburbs (1C)	1.5%	95.6%	1.5%	29.9%	104
17	Parks and Rec (5C)	1.2%	96.8%	2.0%	31.9%	61
18	Trendsetters (3C)	1.1%	97.9%	1.1%	33.0%	98
19	Front Porches (8E)	0.6%	98.5%	1.6%	34.6%	38
20	Set to Impress (11D)	0.5%	99.0%	1.4%	36.0%	34
Subtotal		4.9%		7.6%		
Total		99.1%		36.0%		275

Top Ten Tapestry Segments Site vs. U.S.



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Source: Esri

October 31, 2015

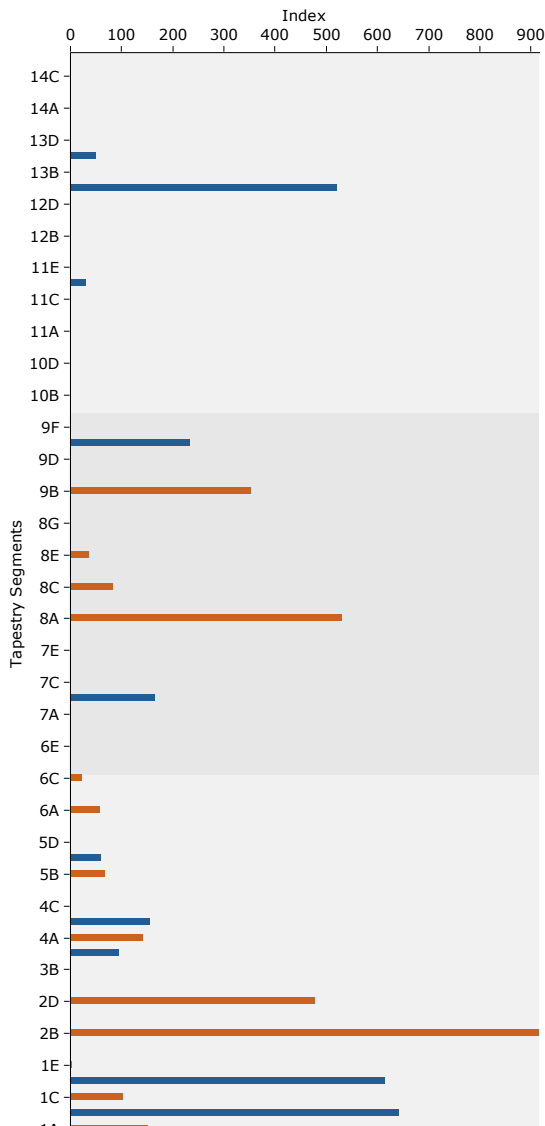


Tapestry Segmentation Area Profile

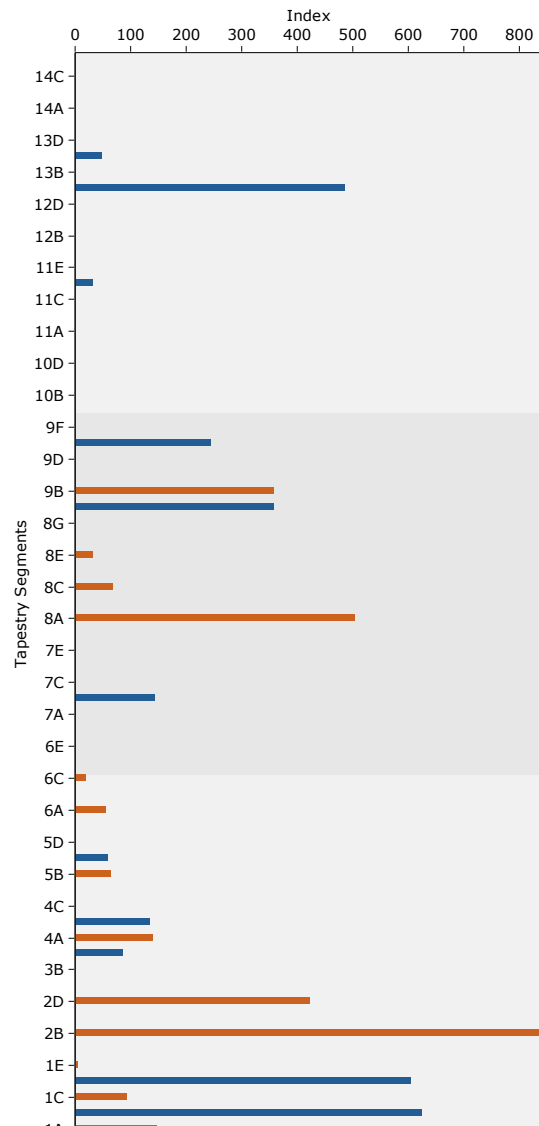
Byram 3,5,10-miles
10 Mansfield Dr, Byram Twp, New Jersey, 07874
Ring: 10 mile radius

Prepared by Esri
Latitude: 40.93709
Longitude: -74.70656

2015 Tapestry Indexes by Households



2015 Tapestry Indexes by Population



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Source: Esri

October 31, 2015



TOWNSHIP OF BYRAM Market Analysis Report



Tapestry Segmentation Area Profile

Byram 3,5,10-miles
10 Mansfield Dr, Byram Twp, New Jersey, 07874
Ring: 10 mile radius

Prepared by Esri
Latitude: 40.93709
Longitude: -74.70656

Tapestry LifeMode Groups	2015 Households			2015 Population		
	Number	Percent	Index	Number	Percent	Index
Total:	85,623	100.0%		231,864	100.0%	
1. Affluent Estates	28,160	32.9%	339	82,949	35.8%	337
Top Tier (1A)	2,265	2.6%	153	6,466	2.8%	150
Professional Pride (1B)	8,760	10.2%	644	27,184	11.7%	625
Boomburbs (1C)	1,312	1.5%	104	3,956	1.7%	95
Savvy Suburbanites (1D)	15,737	18.4%	617	45,094	19.4%	606
Exurbanites (1E)	86	0.1%	5	249	0.1%	6
2. Upscale Avenues	23,313	27.2%	481	60,861	26.2%	450
Urban Chic (2A)	24	0.0%	2	65	0.0%	2
Pleasantville (2B)	17,627	20.6%	918	48,145	20.8%	846
Pacific Heights (2C)	0	0.0%	0	0	0.0%	0
Enterprising Professionals (2D)	5,662	6.6%	481	12,651	5.5%	423
3. Uptown Individuals	900	1.1%	29	1,774	0.8%	29
Laptops and Lattes (3A)	0	0.0%	0	0	0.0%	0
Metro Renters (3B)	0	0.0%	0	0	0.0%	0
Trendsetters (3C)	900	1.1%	98	1,774	0.8%	88
4. Family Landscapes	5,748	6.7%	92	16,169	7.0%	88
Soccer Moms (4A)	3,442	4.0%	143	10,288	4.4%	140
Home Improvement (4B)	2,306	2.7%	156	5,881	2.5%	136
Middleburg (4C)	0	0.0%	0	0	0.0%	0
5. GenXurban	2,420	2.8%	24	5,885	2.5%	24
Comfortable Empty Nesters (5A)	13	0.0%	1	46	0.0%	1
In Style (5B)	1,352	1.6%	70	3,123	1.3%	66
Parks and Rec (5C)	1,055	1.2%	61	2,716	1.2%	61
Rustbelt Traditions (5D)	0	0.0%	0	0	0.0%	0
Midlife Constants (5E)	0	0.0%	0	0	0.0%	0
6. Cozy Country Living	1,937	2.3%	19	4,973	2.1%	18
Green Acres (6A)	1,613	1.9%	59	4,289	1.8%	56
Salt of the Earth (6B)	0	0.0%	0	0	0.0%	0
The Great Outdoors (6C)	324	0.4%	24	684	0.3%	20
Prairie Living (6D)	0	0.0%	0	0	0.0%	0
Rural Resort Dwellers (6E)	0	0.0%	0	0	0.0%	0
Heartland Communities (6F)	0	0.0%	0	0	0.0%	0
7. Ethnic Enclaves	1,546	1.8%	26	5,164	2.2%	25
Up and Coming Families (7A)	0	0.0%	0	0	0.0%	0
Urban Villages (7B)	1,546	1.8%	167	5,164	2.2%	144
American Dreamers (7C)	0	0.0%	0	0	0.0%	0
Barrios Urbanos (7D)	0	0.0%	0	0	0.0%	0
Valley Growers (7E)	0	0.0%	0	0	0.0%	0
Southwestern Families (7F)	0	0.0%	0	0	0.0%	0

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Source: Esri

October 31, 2015



TOWNSHIP OF BYRAM Market Analysis Report



Tapestry Segmentation Area Profile

Byram 3,5,10-miles
10 Mansfield Dr, Byram Twp, New Jersey, 07874
Ring: 10 mile radius

Prepared by Esri
Latitude: 40.93709
Longitude: -74.70656

Tapestry LifeMode Groups	2015 Households			2015 Population		
	Number	Percent	Index	Number	Percent	Index
Total:	85,623	100.0%		231,864	100.0%	
8. Middle Ground	8,824	10.3%	94	21,616	9.3%	92
City Lights (8A)	6,729	7.9%	532	17,136	7.4%	506
Emerald City (8B)	0	0.0%	0	0	0.0%	0
Bright Young Professionals (8C)	1,579	1.8%	84	3,238	1.4%	69
Downtown Melting Pot (8D)	0	0.0%	0	0	0.0%	0
Front Porches (8E)	516	0.6%	38	1,242	0.5%	34
Old and Newcomers (8F)	0	0.0%	0	0	0.0%	0
Hardscrabble Road (8G)	0	0.0%	0	0	0.0%	0
9. Senior Styles	6,523	7.6%	132	14,227	6.1%	139
Silver & Gold (9A)	0	0.0%	0	0	0.0%	0
Golden Years (9B)	4,086	4.8%	355	9,028	3.9%	360
The Elders (9C)	0	0.0%	0	0	0.0%	0
Senior Escapes (9D)	0	0.0%	0	0	0.0%	0
Retirement Communities (9E)	2,437	2.8%	235	5,199	2.2%	246
Social Security Set (9F)	0	0.0%	0	0	0.0%	0
10. Rustic Outposts	0	0.0%	0	0	0.0%	0
Southern Satellites (10A)	0	0.0%	0	0	0.0%	0
Rooted Rural (10B)	0	0.0%	0	0	0.0%	0
Diners & Miners (10C)	0	0.0%	0	0	0.0%	0
Down the Road (10D)	0	0.0%	0	0	0.0%	0
Rural Bypasses (10E)	0	0.0%	0	0	0.0%	0
11. Midtown Singles	399	0.5%	8	911	0.4%	7
City Strivers (11A)	0	0.0%	0	0	0.0%	0
Young and Restless (11B)	0	0.0%	0	0	0.0%	0
Metro Fusion (11C)	0	0.0%	0	0	0.0%	0
Set to Impress (11D)	399	0.5%	34	911	0.4%	34
City Commons (11E)	0	0.0%	0	0	0.0%	0
12. Hometown	0	0.0%	0	0	0.0%	0
Family Foundations (12A)	0	0.0%	0	0	0.0%	0
Traditional Living (12B)	0	0.0%	0	0	0.0%	0
Small Town Simplicity (12C)	0	0.0%	0	0	0.0%	0
Modest Income Homes (12D)	0	0.0%	0	0	0.0%	0
13. Next Wave	5,853	6.8%	176	17,335	7.5%	153
International Marketplace (13A)	5,518	6.4%	523	16,227	7.0%	487
Las Casas (13B)	0	0.0%	0	0	0.0%	0
NeWest Residents (13C)	335	0.4%	51	1,108	0.5%	49
Fresh Ambitions (13D)	0	0.0%	0	0	0.0%	0
High Rise Renters (13E)	0	0.0%	0	0	0.0%	0
14. Scholars and Patriots	0	0.0%	0	0	0.0%	0
Military Proximity (14A)	0	0.0%	0	0	0.0%	0
College Towns (14B)	0	0.0%	0	0	0.0%	0
Dorms to Diplomas (14C)	0	0.0%	0	0	0.0%	0
Unclassified (15)	0	0.0%	0	0	0.0%	0

Data Note: This report identifies neighborhood segments in the area, and describes the socioeconomic quality of the immediate neighborhood. The index is a comparison of the percent of households or population in the area, by Tapestry segment, to the percent of households or population in the United States, by segment. An index of 100 is the US average.

Source: Esri

October 31, 2015



TOWNSHIP OF BYRAM Market Analysis Report



Tapestry Segmentation Area Profile

Byram 3,5,10-miles
10 Mansfield Dr, Byram Twp, New Jersey, 07874
Ring: 10 mile radius

Prepared by Esri
Latitude: 40.93709
Longitude: -74.70656

Tapestry Urbanization Groups	2015 Households			2015 Population		
	Number	Percent	Index	Number	Percent	Index
Total:	85,623	100.0%		231,864	100.0%	
1. Principal Urban Center	1,235	1.4%	21	2,882	1.2%	19
Laptops and Lattes (3A)	0	0.0%	0	0	0.0%	0
Metro Renters (3B)	0	0.0%	0	0	0.0%	0
Trendsetters (3C)	900	1.1%	98	1,774	0.8%	88
Downtown Melting Pot (8D)	0	0.0%	0	0	0.0%	0
City Strivers (11A)	0	0.0%	0	0	0.0%	0
NeWest Residents (13C)	335	0.4%	51	1,108	0.5%	49
Fresh Ambitions (13D)	0	0.0%	0	0	0.0%	0
High Rise Renters (13E)	0	0.0%	0	0	0.0%	0
2. Urban Periphery	15,372	18.0%	106	41,765	18.0%	96
Pacific Heights (2C)	0	0.0%	0	0	0.0%	0
Rustbelt Traditions (5D)	0	0.0%	0	0	0.0%	0
Urban Villages (7B)	1,546	1.8%	167	5,164	2.2%	144
American Dreamers (7C)	0	0.0%	0	0	0.0%	0
Barrios Urbanos (7D)	0	0.0%	0	0	0.0%	0
Southwestern Families (7F)	0	0.0%	0	0	0.0%	0
City Lights (8A)	6,729	7.9%	532	17,136	7.4%	506
Bright Young Professionals (8C)	1,579	1.8%	84	3,238	1.4%	69
Metro Fusion (11C)	0	0.0%	0	0	0.0%	0
Family Foundations (12A)	0	0.0%	0	0	0.0%	0
Modest Income Homes (12D)	0	0.0%	0	0	0.0%	0
International Marketplace (13A)	5,518	6.4%	523	16,227	7.0%	487
Las Casas (13B)	0	0.0%	0	0	0.0%	0
3. Metro Cities	4,704	5.5%	30	10,475	4.5%	29
In Style (5B)	1,352	1.6%	70	3,123	1.3%	66
Emerald City (8B)	0	0.0%	0	0	0.0%	0
Front Porches (8E)	516	0.6%	38	1,242	0.5%	34
Old and Newcomers (8F)	0	0.0%	0	0	0.0%	0
Hardscrabble Road (8G)	0	0.0%	0	0	0.0%	0
Retirement Communities (9E)	2,437	2.8%	235	5,199	2.2%	246
Social Security Set (9F)	0	0.0%	0	0	0.0%	0
Young and Restless (11B)	0	0.0%	0	0	0.0%	0
Set to Impress (11D)	399	0.5%	34	911	0.4%	34
City Commons (11E)	0	0.0%	0	0	0.0%	0
Traditional Living (12B)	0	0.0%	0	0	0.0%	0
College Towns (14B)	0	0.0%	0	0	0.0%	0
Dorms to Diplomas (14C)	0	0.0%	0	0	0.0%	0

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Source: Esri

October 31, 2015



TOWNSHIP OF BYRAM Market Analysis Report



Tapestry Segmentation Area Profile

Byram 3,5,10-miles
10 Mansfield Dr, Byram Twp, New Jersey, 07874
Ring: 10 mile radius

Prepared by Esri
Latitude: 40.93709
Longitude: -74.70656

Tapestry Urbanization Groups	2015 Households			2015 Population		
	Number	Percent	Index	Number	Percent	Index
Total:	85,623	100.0%		231,864	100.0%	
4. Suburban Periphery	62,375	72.8%	232	171,769	74.1%	230
Top Tier (1A)	2,265	2.6%	153	6,466	2.8%	150
Professional Pride (1B)	8,760	10.2%	644	27,184	11.7%	625
Boomburbs (1C)	1,312	1.5%	104	3,956	1.7%	95
Savvy Suburbanites (1D)	15,737	18.4%	617	45,094	19.4%	606
Exurbanites (1E)	86	0.1%	5	249	0.1%	6
Urban Chic (2A)	24	0.0%	2	65	0.0%	2
Pleasantville (2B)	17,627	20.6%	918	48,145	20.8%	846
Enterprising Professionals (2D)	5,662	6.6%	481	12,651	5.5%	423
Soccer Moms (4A)	3,442	4.0%	143	10,288	4.4%	140
Home Improvement (4B)	2,306	2.7%	156	5,881	2.5%	136
Comfortable Empty Nesters (5A)	13	0.0%	1	46	0.0%	1
Parks and Rec (5C)	1,055	1.2%	61	2,716	1.2%	61
Midlife Constants (5E)	0	0.0%	0	0	0.0%	0
Up and Coming Families (7A)	0	0.0%	0	0	0.0%	0
Silver & Gold (9A)	0	0.0%	0	0	0.0%	0
Golden Years (9B)	4,086	4.8%	355	9,028	3.9%	360
The Elders (9C)	0	0.0%	0	0	0.0%	0
Military Proximity (14A)	0	0.0%	0	0	0.0%	0
5. Semirural	0	0.0%	0	0	0.0%	0
Middleburg (4C)	0	0.0%	0	0	0.0%	0
Heartland Communities (6F)	0	0.0%	0	0	0.0%	0
Valley Growers (7E)	0	0.0%	0	0	0.0%	0
Senior Escapes (9D)	0	0.0%	0	0	0.0%	0
Down the Road (10D)	0	0.0%	0	0	0.0%	0
Small Town Simplicity (12C)	0	0.0%	0	0	0.0%	0
6. Rural	1,937	2.3%	13	4,973	2.1%	13
Green Acres (6A)	1,613	1.9%	59	4,289	1.8%	56
Salt of the Earth (6B)	0	0.0%	0	0	0.0%	0
The Great Outdoors (6C)	324	0.4%	24	684	0.3%	20
Prairie Living (6D)	0	0.0%	0	0	0.0%	0
Rural Resort Dwellers (6E)	0	0.0%	0	0	0.0%	0
Southern Satellites (10A)	0	0.0%	0	0	0.0%	0
Rooted Rural (10B)	0	0.0%	0	0	0.0%	0
Diners & Miners (10C)	0	0.0%	0	0	0.0%	0
Rural Bypasses (10E)	0	0.0%	0	0	0.0%	0
Unclassified (15)	0	0.0%	0	0	0.0%	0

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Source: Esri

October 31, 2015



Retail MarketPlace Profile

Byram 3.5, 10-miles
10 Mansfield Dr, Byram Twp, New Jersey, 07874
Ring: 3 mile radius

Prepared by Esri
Latitude: 40.93709
Longitude: -74.70656

Summary Demographics						
2015 Population						26,249
2015 Households						9,919
2015 Median Disposable Income						\$62,988
2015 Per Capita Income						\$37,606
Industry Summary	NAICS	Demand (Retail Potential)	Supply (Retail Sales)	Retail Gap	Leakage/Surplus Factor	Number of Businesses
Total Retail Trade and Food & Drink	44-45,722	\$399,425,809	\$294,311,280	\$105,114,529	15.2	167
Total Retail Trade	44-45	\$358,628,223	\$271,578,914	\$87,049,309	13.8	129
Total Food & Drink	722	\$40,797,586	\$22,732,366	\$18,065,220	28.4	38
Industry Group	NAICS	Demand (Retail Potential)	Supply (Retail Sales)	Retail Gap	Leakage/Surplus Factor	Number of Businesses
Motor Vehicle & Parts Dealers	441	\$73,358,466	\$77,522,848	-\$4,164,382	-2.8	14
Automobile Dealers	4411	\$63,789,206	\$70,293,645	-\$6,504,439	-4.9	4
Other Motor Vehicle Dealers	4412	\$4,616,568	\$2,881,368	\$1,735,200	23.1	5
Auto Parts, Accessories & Tire Stores	4413	\$4,952,692	\$4,347,835	\$604,857	6.5	4
Furniture & Home Furnishings Stores	442	\$9,150,995	\$2,073,984	\$7,077,011	63.0	6
Furniture Stores	4421	\$4,343,025	\$830,425	\$3,512,600	67.9	2
Home Furnishings Stores	4422	\$4,807,970	\$1,243,559	\$3,564,411	58.9	4
Electronics & Appliance Stores	443	\$10,931,638	\$1,031,976	\$9,899,662	82.7	4
Bldg Materials, Garden Equip. & Supply Stores	444	\$12,758,852	\$3,232,677	\$9,526,175	59.6	9
Bldg Material & Supplies Dealers	4441	\$10,999,565	\$1,564,371	\$9,435,194	75.1	8
Lawn & Garden Equip & Supply Stores	4442	\$1,759,287	\$1,668,307	\$90,980	2.7	1
Food & Beverage Stores	445	\$71,999,853	\$75,995,930	-\$3,996,077	-2.7	25
Grocery Stores	4451	\$61,774,468	\$71,527,389	-\$9,752,921	-7.3	18
Specialty Food Stores	4452	\$2,711,443	\$475,997	\$2,235,446	70.1	4
Beer, Wine & Liquor Stores	4453	\$7,513,941	\$3,992,544	\$3,521,397	30.6	3
Health & Personal Care Stores	446,4461	\$27,785,788	\$79,920,123	-\$52,134,335	-48.4	7
Gasoline Stations	447,4471	\$32,810,661	\$12,296,748	\$20,513,913	45.5	7
Clothing & Clothing Accessories Stores	448	\$26,293,612	\$741,450	\$25,552,162	94.5	5
Clothing Stores	4481	\$19,651,374	\$596,277	\$19,055,097	94.1	4
Shoe Stores	4482	\$3,176,847	\$0	\$3,176,847	100.0	0
Jewelry, Luggage & Leather Goods Stores	4483	\$3,465,390	\$145,173	\$3,320,217	92.0	1
Sporting Goods, Hobby, Book & Music Stores	451	\$8,565,109	\$1,272,509	\$7,292,600	74.1	12
Sporting Goods/Hobby/Musical Instr Stores	4511	\$7,088,788	\$943,599	\$6,145,189	76.5	8
Book, Periodical & Music Stores	4512	\$1,476,321	\$328,910	\$1,147,411	63.6	4
General Merchandise Stores	452	\$42,420,752	\$808,224	\$41,612,528	96.3	1
Department Stores Excluding Leased Depts.	4521	\$22,417,653	\$808,224	\$21,609,429	93.0	1
Other General Merchandise Stores	4529	\$20,003,100	\$0	\$20,003,100	100.0	0
Miscellaneous Store Retailers	453	\$11,439,346	\$2,216,299	\$9,223,047	67.5	27
Florists	4531	\$716,493	\$498,160	\$218,333	18.0	3
Office Supplies, Stationery & Gift Stores	4532	\$3,591,779	\$122,601	\$3,469,178	93.4	4
Used Merchandise Stores	4533	\$653,741	\$172,974	\$480,767	58.2	2
Other Miscellaneous Store Retailers	4539	\$6,477,333	\$1,422,564	\$5,054,769	64.0	18
Nonstore Retailers	454	\$31,113,151	\$14,466,147	\$16,647,004	36.5	12
Electronic Shopping & Mail-Order Houses	4541	\$25,049,385	\$9,305,818	\$15,743,567	45.8	3
Vending Machine Operators	4542	\$688,786	\$193,154	\$495,632	56.2	1
Direct Selling Establishments	4543	\$5,374,980	\$4,967,174	\$407,806	3.9	8
Food Services & Drinking Places	722	\$40,797,586	\$22,732,366	\$18,065,220	28.4	38
Full-Service Restaurants	7221	\$21,552,168	\$16,191,479	\$5,360,689	14.2	20
Limited-Service Eating Places	7222	\$15,505,529	\$5,322,782	\$10,182,747	48.9	12
Special Food Services	7223	\$2,392,365	\$121,077	\$2,271,288	90.4	1
Drinking Places - Alcoholic Beverages	7224	\$1,347,524	\$1,097,028	\$250,496	10.2	5

Data Note: Supply (retail sales) estimates sales to consumers by establishments. Sales to businesses are excluded. Demand (retail potential) estimates the expected amount spent by consumers at retail establishments. Supply and demand estimates are in current dollars. The Leakage/Surplus Factor presents a snapshot of retail opportunity. This is a measure of the relationship between supply and demand that ranges from +100 (total leakage) to -100 (total surplus). A positive value represents 'leakage' of retail opportunity outside the trade area. A negative value represents a surplus of retail sales, a market where customers are drawn in from outside the trade area. The Retail Gap represents the difference between Retail Potential and Retail Sales. Esri uses the North American Industry Classification System (NAICS) to classify businesses by their primary type of economic activity. Retail establishments are classified into 27 industry groups in the Retail Trade sector, as well as four industry groups within the Food Services & Drinking Establishments subsector. For more information on the Retail MarketPlace data, please view the methodology statement at <http://www.esri.com/library/whitepapers/pdfs/esri-data-retail-marketplace.pdf>.

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October 31, 2015



TOWNSHIP OF BYRAM Market Analysis Report

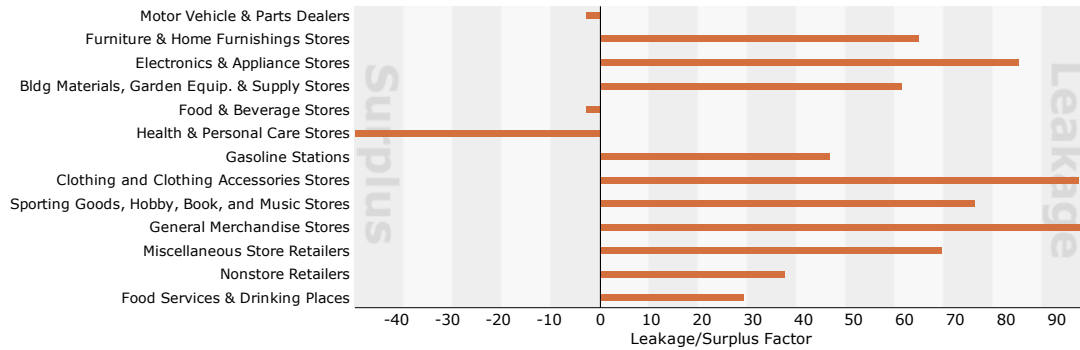


Retail MarketPlace Profile

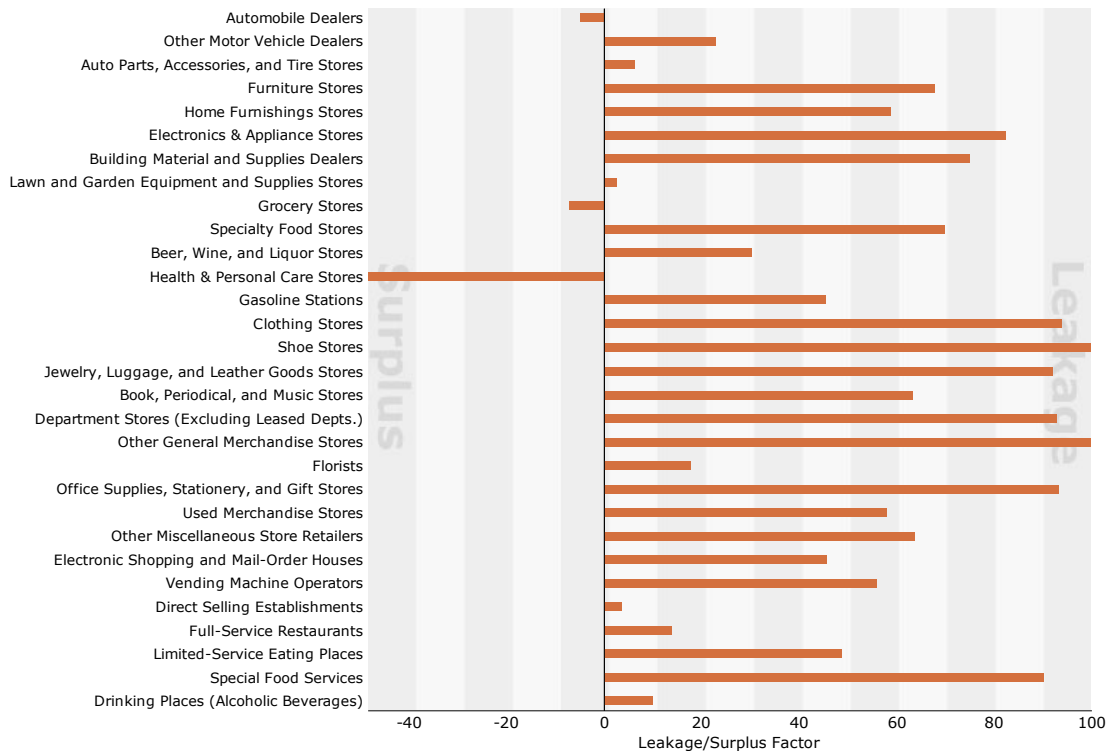
Byram 3,5,10-miles
10 Mansfield Dr, Byram Twp, New Jersey, 07874
Ring: 3 mile radius

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Latitude: 40.93709
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Leakage/Surplus Factor by Industry Subsector



Leakage/Surplus Factor by Industry Group



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TOWNSHIP OF BYRAM Market Analysis Report



Retail MarketPlace Profile

Byram 3,5,10-miles
10 Mansfield Dr, Byram Twp, New Jersey, 07874
Ring: 5 mile radius

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Latitude: 40.93709
Longitude: -74.70656

Summary Demographics						
2015 Population						56,895
2015 Households						21,817
2015 Median Disposable Income						\$64,002
2015 Per Capita Income						\$40,011
Industry Summary	NAICS	Demand (Retail Potential)	Supply (Retail Sales)	Retail Gap	Leakage/Surplus Factor	Number of Businesses
Total Retail Trade and Food & Drink	44-45,722	\$922,586,788	\$629,675,310	\$292,911,478	18.9	394
Total Retail Trade	44-45	\$828,382,506	\$578,957,251	\$249,425,255	17.7	313
Total Food & Drink	722	\$94,204,283	\$50,718,059	\$43,486,224	30.0	82
Industry Group	NAICS	Demand (Retail Potential)	Supply (Retail Sales)	Retail Gap	Leakage/Surplus Factor	Number of Businesses
Motor Vehicle & Parts Dealers	441	\$170,153,118	\$121,847,165	\$48,305,953	16.5	32
Automobile Dealers	4411	\$148,188,658	\$89,484,571	\$58,704,087	24.7	7
Other Motor Vehicle Dealers	4412	\$10,585,170	\$23,838,371	-\$13,253,201	-38.5	15
Auto Parts, Accessories & Tire Stores	4413	\$11,379,290	\$8,524,223	\$2,855,067	14.3	10
Furniture & Home Furnishings Stores	442	\$21,186,213	\$15,718,418	\$5,467,795	14.8	20
Furniture Stores	4421	\$10,138,883	\$2,158,706	\$7,980,177	64.9	7
Home Furnishings Stores	4422	\$11,047,330	\$13,559,713	-\$2,512,383	-10.2	13
Electronics & Appliance Stores	443	\$25,194,812	\$3,134,237	\$22,060,575	77.9	11
Bldg Materials, Garden Equip. & Supply Stores	444	\$29,228,202	\$16,935,937	\$12,292,265	26.6	16
Bldg Material & Supplies Dealers	4441	\$25,185,758	\$14,794,206	\$10,391,552	26.0	14
Lawn & Garden Equip & Supply Stores	4442	\$4,042,444	\$2,141,731	\$1,900,713	30.7	2
Food & Beverage Stores	445	\$166,118,565	\$100,802,496	\$65,316,069	24.5	48
Grocery Stores	4451	\$142,577,890	\$91,564,989	\$51,012,901	21.8	32
Specialty Food Stores	4452	\$6,253,715	\$1,560,258	\$4,693,457	60.1	10
Beer, Wine & Liquor Stores	4453	\$17,286,960	\$7,677,249	\$9,609,711	38.5	6
Health & Personal Care Stores	446,4461	\$64,319,052	\$97,643,602	-\$33,324,550	-20.6	24
Gasoline Stations	447,4471	\$75,925,371	\$29,691,573	\$46,233,798	43.8	18
Clothing & Clothing Accessories Stores	448	\$60,563,922	\$3,067,891	\$57,496,031	90.4	12
Clothing Stores	4481	\$45,233,483	\$1,890,711	\$43,342,772	92.0	7
Shoe Stores	4482	\$7,290,966	\$782,912	\$6,508,054	80.6	2
Jewelry, Luggage & Leather Goods Stores	4483	\$8,039,473	\$394,267	\$7,645,206	90.7	3
Sporting Goods, Hobby, Book & Music Stores	451	\$19,755,612	\$15,121,028	\$4,634,584	13.3	30
Sporting Goods/Hobby/Musical Instr Stores	4511	\$16,330,766	\$14,540,794	\$1,789,972	5.8	25
Book, Periodical & Music Stores	4512	\$3,424,847	\$580,234	\$2,844,613	71.0	5
General Merchandise Stores	452	\$98,059,027	\$124,998,263	-\$26,939,236	-12.1	10
Department Stores Excluding Leased Depts.	4521	\$51,904,480	\$30,576,517	\$21,327,963	25.9	4
Other General Merchandise Stores	4529	\$46,154,547	\$94,421,746	-\$48,267,199	-34.3	6
Miscellaneous Store Retailers	453	\$26,445,529	\$12,866,743	\$13,578,786	34.5	66
Florists	4531	\$1,647,019	\$671,483	\$975,536	42.1	5
Office Supplies, Stationery & Gift Stores	4532	\$8,304,532	\$5,709,943	\$2,594,589	18.5	13
Used Merchandise Stores	4533	\$1,512,809	\$942,022	\$570,787	23.3	10
Other Miscellaneous Store Retailers	4539	\$14,981,169	\$5,543,295	\$9,437,874	46.0	37
Nonstore Retailers	454	\$71,433,082	\$37,129,897	\$34,303,185	31.6	24
Electronic Shopping & Mail-Order Houses	4541	\$57,871,109	\$18,849,223	\$39,021,886	50.9	8
Vending Machine Operators	4542	\$1,588,820	\$12,922,026	-\$11,333,206	-78.1	4
Direct Selling Establishments	4543	\$11,973,153	\$5,358,648	\$6,614,505	38.2	13
Food Services & Drinking Places	722	\$94,204,283	\$50,718,059	\$43,486,224	30.0	82
Full-Service Restaurants	7221	\$49,777,044	\$31,108,344	\$18,668,700	23.1	35
Limited-Service Eating Places	7222	\$35,799,752	\$11,719,028	\$24,080,724	50.7	27
Special Food Services	7223	\$5,529,838	\$2,985,851	\$2,543,987	29.9	6
Drinking Places - Alcoholic Beverages	7224	\$3,097,649	\$4,904,837	-\$1,807,188	-22.6	15

Data Note: Supply (retail sales) estimates sales to consumers by establishments. Sales to businesses are excluded. Demand (retail potential) estimates the expected amount spent by consumers at retail establishments. Supply and demand estimates are in current dollars. The Leakage/Surplus Factor presents a snapshot of retail opportunity. This is a measure of the relationship between supply and demand that ranges from +100 (total leakage) to -100 (total surplus). A positive value represents 'leakage' of retail opportunity outside the trade area. A negative value represents a surplus of retail sales, a market where customers are drawn in from outside the trade area. The Retail Gap represents the difference between Retail Potential and Retail Sales. Esri uses the North American Industry Classification System (NAICS) to classify businesses by their primary type of economic activity. Retail establishments are classified into 27 industry groups in the Retail Trade sector, as well as four industry groups within the Food Services & Drinking Establishments subsector. For more information on the Retail MarketPlace data, please view the methodology statement at <http://www.esri.com/library/whitepapers/pdfs/esri-data-retail-marketplace.pdf>.

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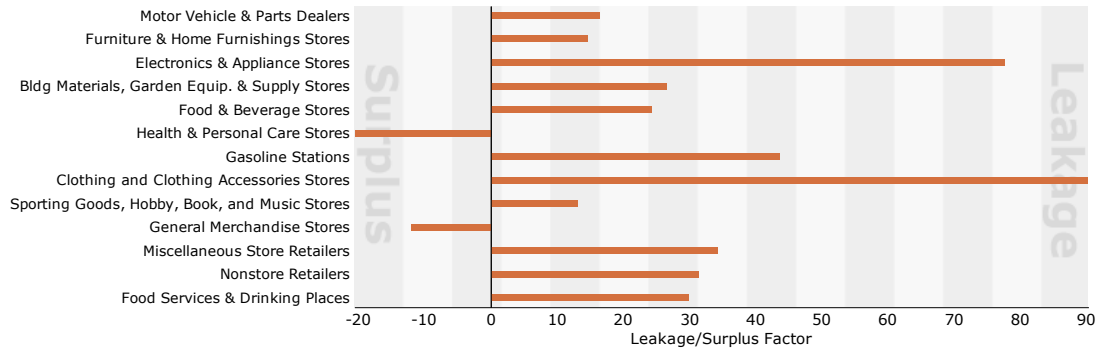


Retail MarketPlace Profile

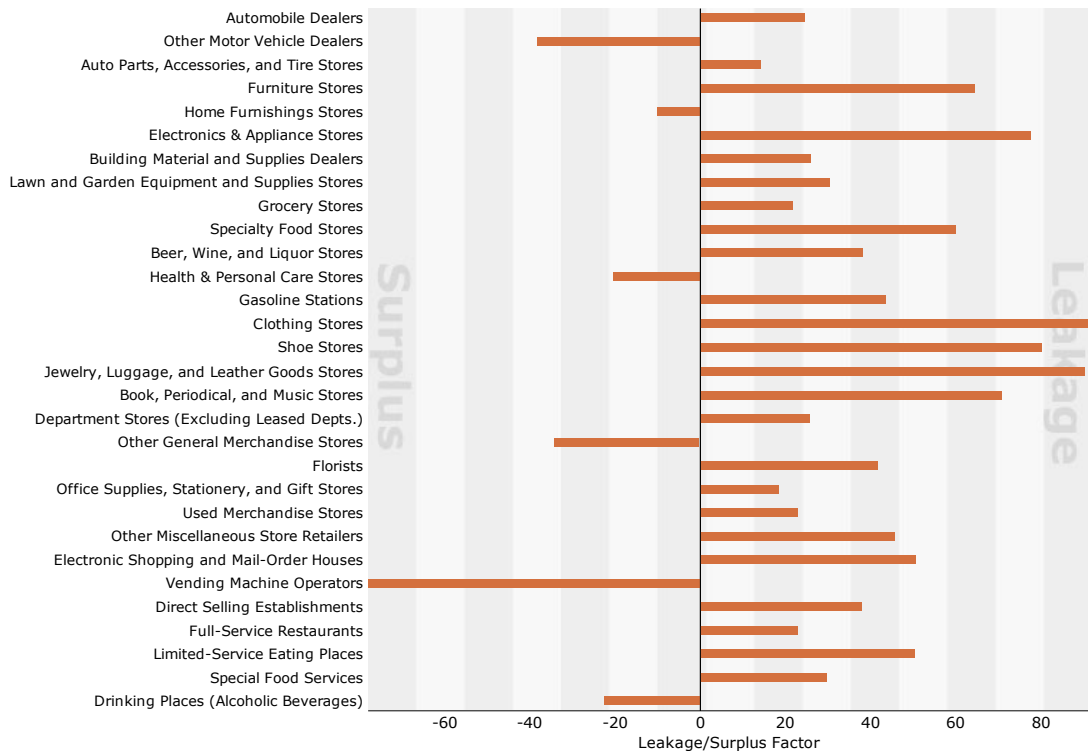
Byram 3,5,10-miles
10 Mansfield Dr, Byram Twp, New Jersey, 07874
Ring: 5 mile radius

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Leakage/Surplus Factor by Industry Subsector



Leakage/Surplus Factor by Industry Group



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Retail MarketPlace Profile

Byram 3.5, 10-miles
10 Mansfield Dr, Byram Twp, New Jersey, 07874
Ring: 10 mile radius

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Longitude: -74.70656

Summary Demographics						
2015 Population						231,864
2015 Households						85,623
2015 Median Disposable Income						\$64,963
2015 Per Capita Income						\$41,266
Industry Summary	NAICS	Demand (Retail Potential)	Supply (Retail Sales)	Retail Gap	Leakage/Surplus Factor	Number of Businesses
Total Retail Trade and Food & Drink	44-45,722	\$3,788,686,412	\$2,915,687,715	\$872,998,697	13.0	1,798
Total Retail Trade	44-45	\$3,400,565,857	\$2,682,224,385	\$718,341,472	11.8	1,456
Total Food & Drink	722	\$388,120,555	\$233,463,330	\$154,657,225	24.9	342
Industry Group	NAICS	Demand (Retail Potential)	Supply (Retail Sales)	Retail Gap	Leakage/Surplus Factor	Number of Businesses
Motor Vehicle & Parts Dealers	441	\$699,182,745	\$477,406,595	\$221,776,150	18.8	127
Automobile Dealers	4411	\$609,536,256	\$424,002,110	\$185,534,146	18.0	49
Other Motor Vehicle Dealers	4412	\$43,175,911	\$33,295,726	\$9,880,185	12.9	34
Auto Parts, Accessories & Tire Stores	4413	\$46,470,578	\$20,108,759	\$26,361,819	39.6	44
Furniture & Home Furnishings Stores	442	\$87,147,502	\$66,299,298	\$20,848,204	13.6	94
Furniture Stores	4421	\$42,093,332	\$15,505,431	\$26,587,901	46.2	28
Home Furnishings Stores	4422	\$45,054,169	\$50,793,868	-\$5,739,699	-6.0	66
Electronics & Appliance Stores	443	\$103,265,965	\$136,546,126	-\$33,280,161	-13.9	68
Bldg Materials, Garden Equip. & Supply Stores	444	\$118,924,128	\$121,638,528	-\$2,714,400	-1.1	88
Bldg Material & Supplies Dealers	4441	\$102,598,709	\$111,028,246	-\$8,429,537	-3.9	76
Lawn & Garden Equip & Supply Stores	4442	\$16,325,419	\$10,610,282	\$5,715,137	21.2	12
Food & Beverage Stores	445	\$683,234,368	\$542,902,654	\$140,331,714	11.4	204
Grocery Stores	4451	\$586,880,094	\$433,414,870	\$153,465,224	15.0	117
Specialty Food Stores	4452	\$25,736,819	\$60,966,933	-\$35,230,114	-40.6	54
Beer, Wine & Liquor Stores	4453	\$70,617,454	\$48,520,850	\$22,096,604	18.5	34
Health & Personal Care Stores	446,4461	\$264,181,234	\$180,072,136	\$84,109,098	18.9	110
Gasoline Stations	447,4471	\$311,512,461	\$183,907,798	\$127,604,663	25.8	64
Clothing & Clothing Accessories Stores	448	\$248,670,667	\$128,609,924	\$120,060,743	31.8	144
Clothing Stores	4481	\$185,519,090	\$102,725,884	\$82,793,206	28.7	102
Shoe Stores	4482	\$29,896,458	\$18,958,040	\$10,938,418	22.4	11
Jewelry, Luggage & Leather Goods Stores	4483	\$33,255,119	\$6,926,001	\$26,329,118	65.5	31
Sporting Goods, Hobby, Book & Music Stores	451	\$81,345,296	\$85,609,706	-\$4,264,410	-2.6	129
Sporting Goods/Hobby/Musical Instr Stores	4511	\$67,128,437	\$73,859,912	-\$6,731,475	-4.8	103
Book, Periodical & Music Stores	4512	\$14,216,860	\$11,749,794	\$2,467,066	9.5	26
General Merchandise Stores	452	\$403,803,754	\$596,997,655	-\$193,193,901	-19.3	57
Department Stores Excluding Leased Depts.	4521	\$214,010,048	\$300,545,311	-\$86,535,263	-16.8	32
Other General Merchandise Stores	4529	\$189,793,706	\$296,452,344	-\$106,658,638	-21.9	26
Miscellaneous Store Retailers	453	\$108,635,025	\$61,960,949	\$46,674,076	27.4	283
Florists	4531	\$6,655,643	\$4,777,420	\$1,878,223	16.4	32
Office Supplies, Stationery & Gift Stores	4532	\$34,145,709	\$19,062,531	\$15,083,178	28.3	52
Used Merchandise Stores	4533	\$6,249,999	\$3,991,249	\$2,258,750	22.1	37
Other Miscellaneous Store Retailers	4539	\$61,583,674	\$34,129,750	\$27,453,924	28.7	162
Nonstore Retailers	454	\$290,662,712	\$100,273,014	\$190,389,698	48.7	88
Electronic Shopping & Mail-Order Houses	4541	\$238,110,392	\$58,962,493	\$179,147,899	60.3	21
Vending Machine Operators	4542	\$6,540,304	\$14,586,187	-\$8,045,883	-38.1	19
Direct Selling Establishments	4543	\$46,012,017	\$26,724,334	\$19,287,683	26.5	48
Food Services & Drinking Places	722	\$388,120,555	\$233,463,330	\$154,657,225	24.9	342
Full-Service Restaurants	7221	\$205,096,791	\$121,657,775	\$83,439,016	25.5	138
Limited-Service Eating Places	7222	\$147,475,650	\$84,717,459	\$62,758,191	27.0	136
Special Food Services	7223	\$22,804,686	\$15,512,305	\$7,292,381	19.0	24
Drinking Places - Alcoholic Beverages	7224	\$12,743,428	\$11,575,791	\$1,167,637	4.8	44

Data Note: Supply (retail sales) estimates sales to consumers by establishments. Sales to businesses are excluded. Demand (retail potential) estimates the expected amount spent by consumers at retail establishments. Supply and demand estimates are in current dollars. The Leakage/Surplus Factor presents a snapshot of retail opportunity. This is a measure of the relationship between supply and demand that ranges from +100 (total leakage) to -100 (total surplus). A positive value represents 'leakage' of retail opportunity outside the trade area. A negative value represents a surplus of retail sales, a market where customers are drawn in from outside the trade area. The Retail Gap represents the difference between Retail Potential and Retail Sales. Esri uses the North American Industry Classification System (NAICS) to classify businesses by their primary type of economic activity. Retail establishments are classified into 27 industry groups in the Retail Trade sector, as well as four industry groups within the Food Services & Drinking Establishments subsector. For more information on the Retail MarketPlace data, please view the methodology statement at <http://www.esri.com/library/whitepapers/pdfs/esri-data-retail-marketplace.pdf>.

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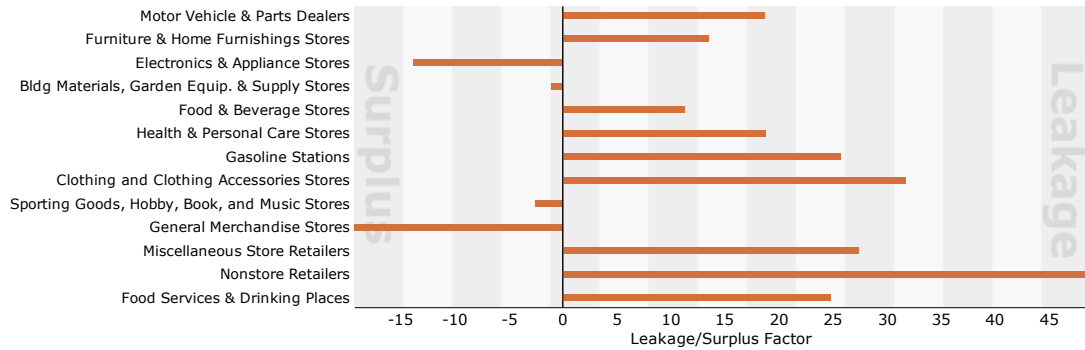


Retail MarketPlace Profile

Byram 3,5,10-miles
10 Mansfield Dr, Byram Twp, New Jersey, 07874
Ring: 10 mile radius

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Longitude: -74.70656

Leakage/Surplus Factor by Industry Subsector



Leakage/Surplus Factor by Industry Group



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TOWNSHIP OF BYRAM Market Analysis Report



Retail Goods and Services Expenditures

Byram 3,5,10-miles
10 Mansfield Dr, Byram Twp, New Jersey, 07874
Ring: 3 mile radius

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Latitude: 40.93709
Longitude: -74.70656

Top Tapestry Segments	Percent	Demographic Summary	2015	2020
Pleasantville (2B)	43.4%	Population	26,249	26,156
Home Improvement (4B)	18.0%	Households	9,919	9,923
City Lights (8A)	18.0%	Families	7,166	7,177
Savvy Suburbanites (1D)	17.5%	Median Age	41.3	42.1
Parks and Rec (5C)	2.7%	Median Household Income	\$84,048	\$92,737
		Spending Potential Index	Average Amount Spent	Total
Apparel and Services		129	\$2,994.67	\$29,704,160
Men's		133	\$578.37	\$5,736,812
Women's		128	\$1,033.48	\$10,251,087
Children's		129	\$482.72	\$4,788,115
Footwear		125	\$570.18	\$5,655,651
Watches & Jewelry		135	\$195.87	\$1,942,826
Apparel Products and Services (1)		137	\$134.05	\$1,329,667
Computer				
Computers and Hardware for Home Use		133	\$286.94	\$2,846,140
Portable Memory		130	\$7.00	\$69,450
Computer Software		137	\$27.78	\$275,598
Computer Accessories		138	\$26.44	\$262,285
Entertainment & Recreation		133	\$4,389.03	\$43,534,798
Fees and Admissions		151	\$973.78	\$9,658,929
Membership Fees for Clubs (2)		147	\$252.88	\$2,508,353
Fees for Participant Sports, excl. Trips		145	\$175.03	\$1,736,132
Admission to Movie/Theatre/Opera/Ballet		145	\$238.82	\$2,368,828
Admission to Sporting Events, excl. Trips		142	\$94.40	\$936,307
Fees for Recreational Lessons		173	\$212.06	\$2,103,426
Dating Services		98	\$0.59	\$5,883
TV/Video/Audio		125	\$1,630.71	\$16,175,019
Cable and Satellite Television Services		122	\$1,093.57	\$10,847,127
Televisions		126	\$186.58	\$1,850,660
Satellite Dishes		105	\$1.65	\$16,401
VCRs, Video Cameras, and DVD Players		125	\$13.75	\$136,381
Miscellaneous Video Equipment		116	\$12.50	\$123,958
Video Cassettes and DVDs		121	\$38.74	\$384,281
Video Game Hardware/Accessories		113	\$26.14	\$259,260
Video Game Software		121	\$33.27	\$329,964
Streaming/Downloaded Video		141	\$8.10	\$80,300
Rental of Video Cassettes and DVDs		120	\$28.15	\$279,195
Installation of Televisions		149	\$1.67	\$16,576
Audio (3)		146	\$179.66	\$1,782,064
Rental and Repair of TV/Radio/Sound Equipment		129	\$6.94	\$68,852
Pets		124	\$703.75	\$6,980,460
Toys and Games (4)		130	\$160.15	\$1,588,480
Recreational Vehicles and Fees (5)		146	\$317.06	\$3,144,881
Sports/Recreation/Exercise Equipment (6)		127	\$239.73	\$2,377,929
Photo Equipment and Supplies (7)		137	\$111.65	\$1,107,426
Reading (8)		140	\$213.38	\$2,116,541
Catered Affairs (9)		163	\$38.83	\$385,132
Food		127	\$10,795.35	\$107,079,115
Food at Home		125	\$6,521.78	\$64,689,570
Bakery and Cereal Products		126	\$918.21	\$9,107,680
Meats, Poultry, Fish, and Eggs		124	\$1,423.77	\$14,122,376
Dairy Products		127	\$714.56	\$7,087,716
Fruits and Vegetables		130	\$1,282.59	\$12,721,974
Snacks and Other Food at Home (10)		122	\$2,182.66	\$21,649,824
Food Away from Home		130	\$4,273.57	\$42,389,545
Alcoholic Beverages		137	\$760.61	\$7,544,452
Nonalcoholic Beverages at Home		121	\$605.59	\$6,006,802

Data Note: The Spending Potential Index (SPI) is household-based, and represents the amount spent for a product or service relative to a national average of 100. Detail may not sum to totals due to rounding.

Source: Esri forecasts for 2015 and 2020; Consumer Spending data are derived from the 2011 and 2012 Consumer Expenditure Surveys, Bureau of Labor Statistics.

October 31, 2015



TOWNSHIP OF BYRAM Market Analysis Report



Retail Goods and Services Expenditures

Byram 3,5,10-miles
10 Mansfield Dr, Byram Twp, New Jersey, 07874
Ring: 3 mile radius

Prepared by Esri
Latitude: 40.93709
Longitude: -74.70656

	Spending Potential Index	Average Amount Spent	Total
Financial			
Investments	137	\$3,766.32	\$37,358,138
Vehicle Loans	122	\$5,181.81	\$51,398,368
Health			
Nonprescription Drugs	120	\$155.61	\$1,543,482
Prescription Drugs	120	\$597.24	\$5,924,064
Eyeglasses and Contact Lenses	133	\$119.56	\$1,185,876
Home			
Mortgage Payment and Basics (11)	154	\$14,415.38	\$142,986,107
Maintenance and Remodeling Services	152	\$2,559.29	\$25,385,616
Maintenance and Remodeling Materials (12)	134	\$401.18	\$3,979,273
Utilities, Fuel, and Public Services	126	\$6,361.25	\$63,097,256
Household Furnishings and Equipment			
Household Textiles (13)	136	\$133.61	\$1,325,244
Furniture	127	\$655.53	\$6,502,193
Rugs	156	\$38.44	\$381,332
Major Appliances (14)	132	\$355.20	\$3,523,218
Housewares (15)	130	\$93.78	\$930,240
Small Appliances	129	\$58.97	\$584,919
Luggage	147	\$13.51	\$134,004
Telephones and Accessories	115	\$57.74	\$572,759
Household Operations			
Child Care	148	\$663.61	\$6,582,322
Lawn and Garden (16)	140	\$608.90	\$6,039,726
Moving/Storage/Freight Express	122	\$90.50	\$897,650
Housekeeping Supplies (17)	125	\$903.63	\$8,963,102
Insurance			
Owners and Renters Insurance	134	\$672.16	\$6,667,201
Vehicle Insurance	130	\$1,573.95	\$15,612,043
Life/Other Insurance	132	\$610.39	\$6,054,468
Health Insurance	130	\$3,434.47	\$34,066,463
Personal Care Products (18)	121	\$564.13	\$5,595,573
School Books and Supplies (19)	123	\$222.31	\$2,205,112
Smoking Products	101	\$472.25	\$4,684,268
Transportation			
Vehicle Purchases (Net Outlay) (20)	121	\$4,894.89	\$48,552,429
Gasoline and Motor Oil	119	\$4,190.25	\$41,563,118
Vehicle Maintenance and Repairs	130	\$1,455.44	\$14,436,529
Travel			
Airline Fares	151	\$722.07	\$7,162,182
Lodging on Trips	148	\$669.77	\$6,643,495
Auto/Truck/Van Rental on Trips	147	\$49.68	\$492,738
Food and Drink on Trips	140	\$653.94	\$6,486,403

Data Note: The Spending Potential Index (SPI) is household-based, and represents the amount spent for a product or service relative to a national average of 100. Detail may not sum to totals due to rounding.

Source: Esri forecasts for 2015 and 2020; Consumer Spending data are derived from the 2011 and 2012 Consumer Expenditure Surveys, Bureau of Labor Statistics.

October 31, 2015



TOWNSHIP OF BYRAM

Market Analysis Report



Retail Goods and Services Expenditures

Byram 3,5,10-miles
10 Mansfield Dr, Byram Twp, New Jersey, 07874
Ring: 3 mile radius

Prepared by Esri
Latitude: 40.93709
Longitude: -74.70656

(1) Apparel Products and Services includes material for making clothes, sewing patterns and notions, shoe repair and other shoe services, apparel laundry and dry cleaning, alteration, repair and tailoring of apparel, clothing rental and storage, and watch and jewelry repair.

(2) Membership Fees for Clubs includes membership fees for social, recreational, and civic clubs.

(3) Audio includes satellite radio service, sound components and systems, digital audio players, records, CDs, audio tapes, streaming/downloaded audio, tape recorders, radios, musical instruments and accessories, and rental and repair of musical instruments.

(4) Toys and Games includes toys, games, arts and crafts, tricycles, playground equipment, arcade games, and online entertainment and games.

(5) Recreational Vehicles & Fees includes docking and landing fees for boats and planes, purchase and rental of RVs or boats, and camp fees.

(6) Sports/Recreation/Exercise Equipment includes exercise equipment and gear, game tables, bicycles, camping equipment, hunting and fishing equipment, winter sports equipment, water sports equipment, other sports equipment, and rental/repair of sports/recreation/exercise equipment.

(7) Photo Equipment and Supplies includes film, film processing, photographic equipment, rental and repair of photo equipment, and photographer fees.

(8) Reading includes digital book readers, books, magazine and newspaper subscriptions, and single copies of magazines and newspapers..

(9) Catered Affairs includes expenses associated with live entertainment and rental of party supplies.

(10) Snacks and Other Food at Home includes candy, chewing gum, sugar, artificial sweeteners, jam, jelly, preserves, margarine, fat, oil, salad dressing, nondairy cream and milk, peanut butter, frozen prepared food, potato chips, nuts, salt, spices, seasonings, olives, pickles, relishes, sauces, gravy, other condiments, soup, prepared salad, prepared dessert, baby food, miscellaneous prepared food, and nonalcoholic beverages.

(11) Mortgage Payment and Basics includes mortgage interest, mortgage principal, property taxes, homeowners insurance, and ground rent.

(12) Maintenance and Remodeling Materials includes supplies/tools/equipment for painting and wallpapering, plumbing supplies and equipment, electrical/heating/AC supplies, materials for hard surface flooring, materials for roofing/gutters, materials for plaster/panel/siding, materials for patio/fence/brick work, landscaping materials, and insulation materials for owned homes.

(13) Household Textiles includes bathroom linens, bedroom linens, kitchen linens, dining room linens, other linens, curtains, draperies, slipcovers, decorative pillows, and materials for slipcovers and curtains.

(14) Major Appliances includes dishwashers, disposals, refrigerators, freezers, washers, dryers, stoves, ovens, microwaves, window air conditioners, electric floor cleaning equipment, sewing machines, and miscellaneous appliances.

(15) Housewares includes plastic dinnerware, china, flatware, glassware, serving pieces, nonelectric cookware, and tableware.

(16) Lawn and Garden includes lawn and garden supplies, equipment and care service, indoor plants, fresh flowers, and repair/rental of lawn and garden equipment.

(17) Housekeeping Supplies includes soaps and laundry detergents, cleaning products, toilet tissue, paper towels, napkins, paper/plastic/foil products, stationery, giftwrap supplies, postage, and delivery services.

(18) Personal Care Products includes hair care products, nonelectric articles for hair, wigs, hairpieces, oral hygiene products, shaving needs, perfume, cosmetics, skincare, bath products, nail products, deodorant, feminine hygiene products, adult diapers, and personal care appliances.

(19) School Books and Supplies includes school books and supplies for College, Elementary school, High school, Vocational/Technical School, Preschool/Other Schools, and Other School Supplies.

(20) Vehicle Purchases (Net Outlay) includes net outlay for new and used cars, trucks, vans, motorcycles, and motor scooters.

Data Note: The Spending Potential Index (SPI) is household-based, and represents the amount spent for a product or service relative to a national average of 100. Detail may not sum to totals due to rounding.

Source: Esri forecasts for 2015 and 2020; Consumer Spending data are derived from the 2011 and 2012 Consumer Expenditure Surveys, Bureau of Labor Statistics.

October 31, 2015



TOWNSHIP OF BYRAM Market Analysis Report



Retail Goods and Services Expenditures

Byram 3,5,10-miles
10 Mansfield Dr, Byram Twp, New Jersey, 07874
Ring: 5 mile radius

Prepared by Esri
Latitude: 40.93709
Longitude: -74.70656

Top Tapestry Segments	Percent	Demographic Summary	2015	2020
Pleasantville (2B)	39.5%	Population	56,895	57,036
Savvy Suburbanites (1D)	14.2%	Households	21,817	21,928
Home Improvement (4B)	9.7%	Families	15,501	15,607
City Lights (8A)	9.3%	Median Age	42.2	43.2
Golden Years (9B)	8.2%	Median Household Income	\$84,853	\$93,750
		Spending Potential Index	Average Amount Spent	Total
Apparel and Services		136	\$3,142.64	\$68,562,901
Men's		139	\$604.62	\$13,190,924
Women's		135	\$1,089.59	\$23,771,501
Children's		135	\$504.03	\$10,996,367
Footwear		131	\$598.06	\$13,047,823
Watches & Jewelry		143	\$206.33	\$4,501,485
Apparel Products and Services (1)		143	\$140.02	\$3,054,802
Computer				
Computers and Hardware for Home Use		139	\$300.63	\$6,558,836
Portable Memory		136	\$7.32	\$159,792
Computer Software		142	\$28.83	\$629,013
Computer Accessories		144	\$27.46	\$599,058
Entertainment & Recreation		139	\$4,588.64	\$100,110,298
Fees and Admissions		157	\$1,015.18	\$22,148,128
Membership Fees for Clubs (2)		155	\$266.48	\$5,813,825
Fees for Participant Sports, excl. Trips		152	\$182.94	\$3,991,261
Admission to Movie/Theatre/Opera/Ballet		150	\$247.96	\$5,409,824
Admission to Sporting Events, excl. Trips		150	\$99.72	\$2,175,685
Fees for Recreational Lessons		177	\$217.44	\$4,743,798
Dating Services		105	\$0.63	\$13,735
TV/Video/Audio		131	\$1,712.42	\$37,359,810
Cable and Satellite Television Services		128	\$1,148.67	\$25,060,478
Televisions		133	\$196.36	\$4,283,952
Satellite Dishes		113	\$1.77	\$38,678
VCRs, Video Cameras, and DVD Players		132	\$14.49	\$316,056
Miscellaneous Video Equipment		128	\$13.78	\$300,738
Video Cassettes and DVDs		127	\$40.82	\$890,485
Video Game Hardware/Accessories		120	\$27.70	\$604,355
Video Game Software		128	\$35.19	\$767,828
Streaming/Downloaded Video		146	\$8.38	\$182,893
Rental of Video Cassettes and DVDs		126	\$29.64	\$646,613
Installation of Televisions		159	\$1.78	\$38,928
Audio (3)		151	\$186.66	\$4,072,469
Rental and Repair of TV/Radio/Sound Equipment		133	\$7.17	\$156,336
Pets		130	\$738.15	\$16,104,199
Toys and Games (4)		136	\$166.63	\$3,635,414
Recreational Vehicles and Fees (5)		150	\$326.04	\$7,113,175
Sports/Recreation/Exercise Equipment (6)		133	\$252.03	\$5,498,597
Photo Equipment and Supplies (7)		144	\$116.90	\$2,550,404
Reading (8)		146	\$221.54	\$4,833,277
Catered Affairs (9)		167	\$39.75	\$867,295
Food		133	\$11,320.39	\$246,976,943
Food at Home		131	\$6,837.65	\$149,176,984
Bakery and Cereal Products		132	\$961.99	\$20,987,799
Meats, Poultry, Fish, and Eggs		130	\$1,493.14	\$32,575,809
Dairy Products		133	\$747.29	\$16,303,727
Fruits and Vegetables		136	\$1,338.57	\$29,203,571
Snacks and Other Food at Home (10)		128	\$2,296.65	\$50,106,077
Food Away from Home		136	\$4,482.74	\$97,799,959
Alcoholic Beverages		143	\$794.26	\$17,328,397
Nonalcoholic Beverages at Home		128	\$636.42	\$13,884,832

Data Note: The Spending Potential Index (SPI) is household-based, and represents the amount spent for a product or service relative to a national average of 100. Detail may not sum to totals due to rounding.

Source: Esri forecasts for 2015 and 2020; Consumer Spending data are derived from the 2011 and 2012 Consumer Expenditure Surveys, Bureau of Labor Statistics.

October 31, 2015



TOWNSHIP OF BYRAM Market Analysis Report



Retail Goods and Services Expenditures

Byram 3,5,10-miles
10 Mansfield Dr, Byram Twp, New Jersey, 07874
Ring: 5 mile radius

Prepared by Esri
Latitude: 40.93709
Longitude: -74.70656

	Spending Potential Index	Average Amount Spent	Total
Financial			
Investments	139	\$3,820.24	\$83,346,279
Vehicle Loans	129	\$5,483.13	\$119,625,509
Health			
Nonprescription Drugs	127	\$163.77	\$3,573,077
Prescription Drugs	127	\$630.01	\$13,744,834
Eyeglasses and Contact Lenses	139	\$124.94	\$2,725,723
Home			
Mortgage Payment and Basics (11)	159	\$14,859.43	\$324,188,224
Maintenance and Remodeling Services	157	\$2,652.97	\$57,879,881
Maintenance and Remodeling Materials (12)	138	\$414.16	\$9,035,705
Utilities, Fuel, and Public Services	132	\$6,663.95	\$145,387,380
Household Furnishings and Equipment			
Household Textiles (13)	141	\$139.26	\$3,038,215
Furniture	135	\$695.01	\$15,163,099
Rugs	162	\$39.92	\$870,961
Major Appliances (14)	138	\$371.61	\$8,107,503
Housewares (15)	136	\$98.28	\$2,144,089
Small Appliances	134	\$61.48	\$1,341,225
Luggage	153	\$14.06	\$306,831
Telephones and Accessories	122	\$61.34	\$1,338,171
Household Operations			
Child Care	153	\$686.50	\$14,977,442
Lawn and Garden (16)	146	\$633.93	\$13,830,409
Moving/Storage/Freight Express	129	\$95.76	\$2,089,092
Housekeeping Supplies (17)	131	\$949.65	\$20,718,433
Insurance			
Owners and Renters Insurance	140	\$703.26	\$15,342,951
Vehicle Insurance	136	\$1,647.20	\$35,937,032
Life/Other Insurance	140	\$644.72	\$14,065,944
Health Insurance	136	\$3,597.35	\$78,483,286
Personal Care Products (18)	128	\$597.52	\$13,036,001
School Books and Supplies (19)	131	\$235.28	\$5,133,024
Smoking Products	108	\$501.39	\$10,938,915
Transportation			
Vehicle Purchases (Net Outlay) (20)	128	\$5,179.78	\$113,007,343
Gasoline and Motor Oil	126	\$4,416.66	\$96,358,269
Vehicle Maintenance and Repairs	136	\$1,521.01	\$33,183,838
Travel			
Airline Fares	157	\$747.57	\$16,309,645
Lodging on Trips	154	\$697.23	\$15,211,458
Auto/Truck/Van Rental on Trips	154	\$52.14	\$1,137,488
Food and Drink on Trips	146	\$682.27	\$14,885,152

Data Note: The Spending Potential Index (SPI) is household-based, and represents the amount spent for a product or service relative to a national average of 100. Detail may not sum to totals due to rounding.

Source: Esri forecasts for 2015 and 2020; Consumer Spending data are derived from the 2011 and 2012 Consumer Expenditure Surveys, Bureau of Labor Statistics.

October 31, 2015



Retail Goods and Services Expenditures

Byram 3,5,10-miles
10 Mansfield Dr, Byram Twp, New Jersey, 07874
Ring: 5 mile radius

Prepared by Esri
Latitude: 40.93709
Longitude: -74.70656

(1) Apparel Products and Services includes material for making clothes, sewing patterns and notions, shoe repair and other shoe services, apparel laundry and dry cleaning, alteration, repair and tailoring of apparel, clothing rental and storage, and watch and jewelry repair.

(2) Membership Fees for Clubs includes membership fees for social, recreational, and civic clubs.

(3) Audio includes satellite radio service, sound components and systems, digital audio players, records, CDs, audio tapes, streaming/downloaded audio, tape recorders, radios, musical instruments and accessories, and rental and repair of musical instruments.

(4) Toys and Games includes toys, games, arts and crafts, tricycles, playground equipment, arcade games, and online entertainment and games.

(5) Recreational Vehicles & Fees includes docking and landing fees for boats and planes, purchase and rental of RVs or boats, and camp fees.

(6) Sports/Recreation/Exercise Equipment includes exercise equipment and gear, game tables, bicycles, camping equipment, hunting and fishing equipment, winter sports equipment, water sports equipment, other sports equipment, and rental/repair of sports/recreation/exercise equipment.

(7) Photo Equipment and Supplies includes film, film processing, photographic equipment, rental and repair of photo equipment, and photographer fees.

(8) Reading includes digital book readers, books, magazine and newspaper subscriptions, and single copies of magazines and newspapers..

(9) Catered Affairs includes expenses associated with live entertainment and rental of party supplies.

(10) Snacks and Other Food at Home includes candy, chewing gum, sugar, artificial sweeteners, jam, jelly, preserves, margarine, fat, oil, salad dressing, nondairy cream and milk, peanut butter, frozen prepared food, potato chips, nuts, salt, spices, seasonings, olives, pickles, relishes, sauces, gravy, other condiments, soup, prepared salad, prepared dessert, baby food, miscellaneous prepared food, and nonalcoholic beverages.

(11) Mortgage Payment and Basics includes mortgage interest, mortgage principal, property taxes, homeowners insurance, and ground rent.

(12) Maintenance and Remodeling Materials includes supplies/tools/equipment for painting and wallpapering, plumbing supplies and equipment, electrical/heating/AC supplies, materials for hard surface flooring, materials for roofing/gutters, materials for plaster/panel/siding, materials for patio/fence/brick work, landscaping materials, and insulation materials for owned homes.

(13) Household Textiles includes bathroom linens, bedroom linens, kitchen linens, dining room linens, other linens, curtains, draperies, slipcovers, decorative pillows, and materials for slipcovers and curtains.

(14) Major Appliances includes dishwashers, disposals, refrigerators, freezers, washers, dryers, stoves, ovens, microwaves, window air conditioners, electric floor cleaning equipment, sewing machines, and miscellaneous appliances.

(15) Housewares includes plastic dinnerware, china, flatware, glassware, serving pieces, nonelectric cookware, and tableware.

(16) Lawn and Garden includes lawn and garden supplies, equipment and care service, indoor plants, fresh flowers, and repair/rental of lawn and garden equipment.

(17) Housekeeping Supplies includes soaps and laundry detergents, cleaning products, toilet tissue, paper towels, napkins, paper/plastic/foil products, stationery, giftwrap supplies, postage, and delivery services.

(18) Personal Care Products includes hair care products, nonelectric articles for hair, wigs, hairpieces, oral hygiene products, shaving needs, perfume, cosmetics, skincare, bath products, nail products, deodorant, feminine hygiene products, adult diapers, and personal care appliances.

(19) School Books and Supplies includes school books and supplies for College, Elementary school, High school, Vocational/Technical School, Preschool/Other Schools, and Other School Supplies.

(20) Vehicle Purchases (Net Outlay) includes net outlay for new and used cars, trucks, vans, motorcycles, and motor scooters.

Data Note: The Spending Potential Index (SPI) is household-based, and represents the amount spent for a product or service relative to a national average of 100. Detail may not sum to totals due to rounding.

Source: Esri forecasts for 2015 and 2020; Consumer Spending data are derived from the 2011 and 2012 Consumer Expenditure Surveys, Bureau of Labor Statistics.

October 31, 2015



TOWNSHIP OF BYRAM Market Analysis Report



Retail Goods and Services Expenditures

Byram 3,5,10-miles
10 Mansfield Dr, Byram Twp, New Jersey, 07874
Ring: 10 mile radius

Prepared by Esri
Latitude: 40.93709
Longitude: -74.70656

Top Tapestry Segments	Percent	Demographic Summary	2015	2020
Pleasantville (2B)	20.6%	Population	231,864	233,589
Savvy Suburbanites (1D)	18.4%	Households	85,623	86,464
Professional Pride (1B)	10.2%	Families	61,275	61,952
City Lights (8A)	7.9%	Median Age	41.6	42.5
Enterprising Professionals (2D)	6.6%	Median Household Income	\$85,683	\$96,020
		Spending Potential Index	Average Amount Spent	Total
Apparel and Services		147	\$3,408.31	\$291,829,780
Men's		150	\$651.82	\$55,811,041
Women's		146	\$1,180.32	\$101,062,310
Children's		146	\$547.72	\$46,897,637
Footwear		143	\$655.18	\$56,098,374
Watches & Jewelry		153	\$221.91	\$19,000,415
Apparel Products and Services (1)		155	\$151.36	\$12,960,003
Computer				
Computers and Hardware for Home Use		150	\$323.34	\$27,685,441
Portable Memory		147	\$7.92	\$678,120
Computer Software		155	\$31.34	\$2,683,267
Computer Accessories		152	\$29.06	\$2,488,621
Entertainment & Recreation		148	\$4,895.64	\$419,179,139
Fees and Admissions		167	\$1,078.86	\$92,375,513
Membership Fees for Clubs (2)		166	\$283.95	\$24,312,518
Fees for Participant Sports, excl. Trips		162	\$195.38	\$16,729,287
Admission to Movie/Theatre/Opera/Ballet		161	\$264.99	\$22,689,344
Admission to Sporting Events, excl. Trips		160	\$106.75	\$9,139,892
Fees for Recreational Lessons		185	\$227.06	\$19,441,433
Dating Services		123	\$0.74	\$63,040
TV/Video/Audio		140	\$1,835.33	\$157,146,588
Cable and Satellite Television Services		137	\$1,226.35	\$105,003,963
Televisions		143	\$211.75	\$18,130,738
Satellite Dishes		129	\$2.02	\$172,644
VCRs, Video Cameras, and DVD Players		143	\$15.72	\$1,346,230
Miscellaneous Video Equipment		144	\$15.46	\$1,324,145
Video Cassettes and DVDs		139	\$44.64	\$3,822,162
Video Game Hardware/Accessories		133	\$30.80	\$2,637,229
Video Game Software		139	\$38.16	\$3,267,387
Streaming/Downloaded Video		160	\$9.18	\$786,239
Rental of Video Cassettes and DVDs		138	\$32.54	\$2,785,968
Installation of Televisions		172	\$1.93	\$165,355
Audio (3)		161	\$199.08	\$17,046,191
Rental and Repair of TV/Radio/Sound Equipment		143	\$7.69	\$658,336
Pets		139	\$789.06	\$67,561,775
Toys and Games (4)		146	\$179.06	\$15,331,437
Recreational Vehicles and Fees (5)		156	\$339.68	\$29,084,179
Sports/Recreation/Exercise Equipment (6)		144	\$272.68	\$23,347,591
Photo Equipment and Supplies (7)		155	\$125.84	\$10,774,494
Reading (8)		153	\$233.15	\$19,962,796
Catered Affairs (9)		176	\$41.98	\$3,594,766
Food		144	\$12,241.08	\$1,048,117,794
Food at Home		142	\$7,400.07	\$633,616,066
Bakery and Cereal Products		142	\$1,038.22	\$88,895,873
Meats, Poultry, Fish, and Eggs		141	\$1,617.32	\$138,479,967
Dairy Products		143	\$805.68	\$68,984,480
Fruits and Vegetables		146	\$1,445.33	\$123,753,692
Snacks and Other Food at Home (10)		139	\$2,493.51	\$213,502,053
Food Away from Home		147	\$4,841.01	\$414,501,728
Alcoholic Beverages		153	\$850.77	\$72,845,717
Nonalcoholic Beverages at Home		138	\$689.63	\$59,048,096

Data Note: The Spending Potential Index (SPI) is household-based, and represents the amount spent for a product or service relative to a national average of 100. Detail may not sum to totals due to rounding.

Source: Esri forecasts for 2015 and 2020; Consumer Spending data are derived from the 2011 and 2012 Consumer Expenditure Surveys, Bureau of Labor Statistics.

October 31, 2015



TOWNSHIP OF BYRAM Market Analysis Report



Retail Goods and Services Expenditures

Byram 3,5,10-miles
10 Mansfield Dr, Byram Twp, New Jersey, 07874
Ring: 10 mile radius

Prepared by Esri
Latitude: 40.93709
Longitude: -74.70656

	Spending Potential Index	Average Amount Spent	Total
Financial			
Investments	152	\$4,174.63	\$357,443,992
Vehicle Loans	139	\$5,891.42	\$504,441,127
Health			
Nonprescription Drugs	137	\$176.58	\$15,118,934
Prescription Drugs	134	\$668.29	\$57,220,698
Eyeglasses and Contact Lenses	147	\$132.62	\$11,355,527
Home			
Mortgage Payment and Basics (11)	164	\$15,349.34	\$1,314,256,368
Maintenance and Remodeling Services	161	\$2,722.97	\$233,148,589
Maintenance and Remodeling Materials (12)	143	\$428.61	\$36,699,209
Utilities, Fuel, and Public Services	140	\$7,066.24	\$605,032,934
Household Furnishings and Equipment			
Household Textiles (13)	150	\$148.03	\$12,674,744
Furniture	146	\$751.40	\$64,337,234
Rugs	169	\$41.56	\$3,558,456
Major Appliances (14)	146	\$391.19	\$33,494,475
Housewares (15)	147	\$105.83	\$9,061,730
Small Appliances	144	\$65.71	\$5,626,371
Luggage	163	\$14.99	\$1,283,690
Telephones and Accessories	135	\$67.71	\$5,797,171
Household Operations			
Child Care	164	\$733.53	\$62,806,823
Lawn and Garden (16)	151	\$656.70	\$56,228,280
Moving/Storage/Freight Express	143	\$106.29	\$9,100,739
Housekeeping Supplies (17)	142	\$1,022.20	\$87,524,024
Insurance			
Owners and Renters Insurance	145	\$729.94	\$62,499,291
Vehicle Insurance	144	\$1,747.05	\$149,587,833
Life/Other Insurance	148	\$681.90	\$58,386,378
Health Insurance	143	\$3,790.84	\$324,582,733
Personal Care Products (18)	140	\$655.54	\$56,128,924
School Books and Supplies (19)	143	\$258.33	\$22,118,624
Smoking Products	117	\$546.86	\$46,823,603
Transportation			
Vehicle Purchases (Net Outlay) (20)	137	\$5,555.40	\$475,670,207
Gasoline and Motor Oil	135	\$4,741.85	\$406,011,617
Vehicle Maintenance and Repairs	146	\$1,625.73	\$139,200,061
Travel			
Airline Fares	167	\$797.50	\$68,284,404
Lodging on Trips	162	\$732.23	\$62,695,354
Auto/Truck/Van Rental on Trips	165	\$55.81	\$4,778,996
Food and Drink on Trips	156	\$724.86	\$62,064,297

Data Note: The Spending Potential Index (SPI) is household-based, and represents the amount spent for a product or service relative to a national average of 100. Detail may not sum to totals due to rounding.

Source: Esri forecasts for 2015 and 2020; Consumer Spending data are derived from the 2011 and 2012 Consumer Expenditure Surveys, Bureau of Labor Statistics.

October 31, 2015



Retail Goods and Services Expenditures

Byram 3,5,10-miles
10 Mansfield Dr, Byram Twp, New Jersey, 07874
Ring: 10 mile radius

Prepared by Esri
Latitude: 40.93709
Longitude: -74.70656

(1) Apparel Products and Services includes material for making clothes, sewing patterns and notions, shoe repair and other shoe services, apparel laundry and dry cleaning, alteration, repair and tailoring of apparel, clothing rental and storage, and watch and jewelry repair.

(2) Membership Fees for Clubs includes membership fees for social, recreational, and civic clubs.

(3) Audio includes satellite radio service, sound components and systems, digital audio players, records, CDs, audio tapes, streaming/downloaded audio, tape recorders, radios, musical instruments and accessories, and rental and repair of musical instruments.

(4) Toys and Games includes toys, games, arts and crafts, tricycles, playground equipment, arcade games, and online entertainment and games.

(5) Recreational Vehicles & Fees includes docking and landing fees for boats and planes, purchase and rental of RVs or boats, and camp fees.

(6) Sports/Recreation/Exercise Equipment includes exercise equipment and gear, game tables, bicycles, camping equipment, hunting and fishing equipment, winter sports equipment, water sports equipment, other sports equipment, and rental/repair of sports/recreation/exercise equipment.

(7) Photo Equipment and Supplies includes film, film processing, photographic equipment, rental and repair of photo equipment, and photographer fees.

(8) Reading includes digital book readers, books, magazine and newspaper subscriptions, and single copies of magazines and newspapers..

(9) Catered Affairs includes expenses associated with live entertainment and rental of party supplies.

(10) Snacks and Other Food at Home includes candy, chewing gum, sugar, artificial sweeteners, jam, jelly, preserves, margarine, fat, oil, salad dressing, nondairy cream and milk, peanut butter, frozen prepared food, potato chips, nuts, salt, spices, seasonings, olives, pickles, relishes, sauces, gravy, other condiments, soup, prepared salad, prepared dessert, baby food, miscellaneous prepared food, and nonalcoholic beverages.

(11) Mortgage Payment and Basics includes mortgage interest, mortgage principal, property taxes, homeowners insurance, and ground rent.

(12) Maintenance and Remodeling Materials includes supplies/tools/equipment for painting and wallpapering, plumbing supplies and equipment, electrical/heating/AC supplies, materials for hard surface flooring, materials for roofing/gutters, materials for plaster/panel/siding, materials for patio/fence/brick work, landscaping materials, and insulation materials for owned homes.

(13) Household Textiles includes bathroom linens, bedroom linens, kitchen linens, dining room linens, other linens, curtains, draperies, slipcovers, decorative pillows, and materials for slipcovers and curtains.

(14) Major Appliances includes dishwashers, disposals, refrigerators, freezers, washers, dryers, stoves, ovens, microwaves, window air conditioners, electric floor cleaning equipment, sewing machines, and miscellaneous appliances.

(15) Housewares includes plastic dinnerware, china, flatware, glassware, serving pieces, nonelectric cookware, and tableware.

(16) Lawn and Garden includes lawn and garden supplies, equipment and care service, indoor plants, fresh flowers, and repair/rental of lawn and garden equipment.

(17) Housekeeping Supplies includes soaps and laundry detergents, cleaning products, toilet tissue, paper towels, napkins, paper/plastic/foil products, stationery, giftwrap supplies, postage, and delivery services.

(18) Personal Care Products includes hair care products, nonelectric articles for hair, wigs, hairpieces, oral hygiene products, shaving needs, perfume, cosmetics, skincare, bath products, nail products, deodorant, feminine hygiene products, adult diapers, and personal care appliances.

(19) School Books and Supplies includes school books and supplies for College, Elementary school, High school, Vocational/Technical School, Preschool/Other Schools, and Other School Supplies.

(20) Vehicle Purchases (Net Outlay) includes net outlay for new and used cars, trucks, vans, motorcycles, and motor scooters.

Data Note: The Spending Potential Index (SPI) is household-based, and represents the amount spent for a product or service relative to a national average of 100. Detail may not sum to totals due to rounding.

Source: Esri forecasts for 2015 and 2020; Consumer Spending data are derived from the 2011 and 2012 Consumer Expenditure Surveys, Bureau of Labor Statistics.

October 31, 2015



TOWNSHIP OF BYRAM Market Analysis Report



Pets and Products Market Potential

Byram 3,5,10-miles
10 Mansfield Dr, Byram Twp, New Jersey, 07874
Ring: 3 mile radius

Prepared by Esri
Latitude: 40.93709
Longitude: -74.70656

Demographic Summary		2015	2020
Population		26,249	26,156
Population 18+		20,639	20,773
Households		9,919	9,923
Median Household Income		\$84,048	\$92,737
Product/Consumer Behavior	Expected Number of Households	Percent	MPI
HH owns any pet	5,677	57.2%	108
HH owns any bird	305	3.1%	109
HH owns any cat	2,369	23.9%	105
HH owns any dog	4,085	41.2%	104
HH owns 1 cat	1,306	13.2%	106
HH owns 2+ cats	1,061	10.7%	102
HH owns 1 dog	2,689	27.1%	113
HH owns 2+ dogs	1,395	14.1%	88
HH used canned/wet cat food in last 6 months	1,351	13.6%	116
HH used <4 containers of cat food in last 7 days	452	4.6%	97
HH used 8+ containers of cat food in last 7 days	435	4.4%	137
HH used packaged dry cat food in last 6 months	2,283	23.0%	105
HH used <4 pounds pkgd dry cat food last 30 days	806	8.1%	120
HH used 9+ pounds pkgd dry cat food last 30 days	931	9.4%	94
HH used cat treats in last 6 months	1,200	12.1%	106
HH used 3+ packages of cat treats in last 30 days	345	3.5%	96
HH used cat litter in last 6 months	2,128	21.5%	109
HH used 21+ pounds of cat litter in last 30 days	590	5.9%	104
HH used canned/wet dog food in last 6 months	1,530	15.4%	108
HH used <3 containers of dog food in last 7 days	694	7.0%	106
HH used 7+ containers of dog food in last 7 days	495	5.0%	106
HH used packaged dry dog food in last 6 months	3,949	39.8%	105
HH used <10 pounds pkgd dry dog food last 30 days	1,855	18.7%	106
HH used 25+ pounds pkgd dry dog food last 30 days	1,148	11.6%	100
HH used dog biscuits/treats in last 6 months	3,308	33.4%	106
HH used 3+ pkgs dog biscuits/treats last 30 days	950	9.6%	112
HH used flea/tick/parasite product for cat/dog	3,660	36.9%	103
HH Bought pet food from any pet specialty store/12 mo	2,680	27.0%	131
HH Bought pet food in last 12 months: from discount store	878	8.9%	89
HH Bought pet food in last 12 months: from grocery store	2,677	27.0%	99
HH Bought pet food in last 12 months: from PETCO	1,155	11.6%	136
HH Bought pet food in last 12 months: from PetSmart	1,443	14.5%	126
HH Bought pet food in last 12 months: from wholesale club	585	5.9%	132
HH Bought pet food in last 12 months: from vet	491	5.0%	108
HH Bought flea control product from vet in last 12 mo	1,288	13.0%	107
HH member took pet to vet in last 12 months: 1 time	1,355	13.7%	106
HH member took pet to vet in last 12 months: 2 times	1,221	12.3%	106
HH member took pet to vet in last 12 months: 3 times	591	6.0%	105
HH member took pet to vet in last 12 months: 4 times	418	4.2%	119
HH member took pet to vet in last 12 months: 5+ times	640	6.5%	128

Data Note: An MPI (Market Potential Index) measures the relative likelihood of households in the specified trade area to exhibit certain consumer behavior or purchasing patterns compared to the U.S. An MPI of 100 represents the U.S. average.

Source: These data are based upon national propensities to use various products and services, applied to local demographic composition. Usage data were collected by GfK MRI in a nationally representative survey of U.S. households. Esri forecasts for 2015 and 2020.

October 31, 2015



TOWNSHIP OF BYRAM Market Analysis Report



Pets and Products Market Potential

Byram 3,5,10-miles
10 Mansfield Dr, Byram Twp, New Jersey, 07874
Ring: 5 mile radius

Prepared by Esri
Latitude: 40.93709
Longitude: -74.70656

Demographic Summary		2015	2020
Population		56,895	57,036
Population 18+		44,583	45,276
Households		21,817	21,928
Median Household Income		\$84,853	\$93,750
Product/Consumer Behavior	Expected Number of Households	Percent	MPI
HH owns any pet	12,300	56.4%	106
HH owns any bird	602	2.8%	98
HH owns any cat	5,068	23.2%	102
HH owns any dog	8,930	40.9%	103
HH owns 1 cat	2,856	13.1%	106
HH owns 2+ cats	2,209	10.1%	96
HH owns 1 dog	5,926	27.2%	113
HH owns 2+ dogs	3,001	13.8%	86
HH used canned/wet cat food in last 6 months	2,860	13.1%	111
HH used <4 containers of cat food in last 7 days	976	4.5%	95
HH used 8+ containers of cat food in last 7 days	874	4.0%	125
HH used packaged dry cat food in last 6 months	4,868	22.3%	102
HH used <4 pounds pkgd dry cat food last 30 days	1,682	7.7%	114
HH used 9+ pounds pkgd dry cat food last 30 days	2,006	9.2%	92
HH used cat treats in last 6 months	2,533	11.6%	102
HH used 3+ packages of cat treats in last 30 days	698	3.2%	88
HH used cat litter in last 6 months	4,558	20.9%	106
HH used 21+ pounds of cat litter in last 30 days	1,275	5.8%	103
HH used canned/wet dog food in last 6 months	3,250	14.9%	105
HH used <3 containers of dog food in last 7 days	1,505	6.9%	104
HH used 7+ containers of dog food in last 7 days	1,019	4.7%	99
HH used packaged dry dog food in last 6 months	8,598	39.4%	104
HH used <10 pounds pkgd dry dog food last 30 days	4,037	18.5%	105
HH used 25+ pounds pkgd dry dog food last 30 days	2,467	11.3%	98
HH used dog biscuits/treats in last 6 months	7,210	33.0%	105
HH used 3+ pkgs dog biscuits/treats last 30 days	2,013	9.2%	108
HH used flea/tick/parasite product for cat/dog	7,907	36.2%	101
HH Bought pet food from any pet specialty store/12 mo	5,789	26.5%	128
HH Bought pet food in last 12 months: from discount store	1,882	8.6%	87
HH Bought pet food in last 12 months: from grocery store	5,813	26.6%	98
HH Bought pet food in last 12 months: from PETCO	2,473	11.3%	133
HH Bought pet food in last 12 months: from PetSmart	3,160	14.5%	126
HH Bought pet food in last 12 months: from wholesale club	1,224	5.6%	126
HH Bought pet food in last 12 months: from vet	1,056	4.8%	106
HH Bought flea control product from vet in last 12 mo	2,849	13.1%	107
HH member took pet to vet in last 12 months: 1 time	2,914	13.4%	104
HH member took pet to vet in last 12 months: 2 times	2,675	12.3%	106
HH member took pet to vet in last 12 months: 3 times	1,289	5.9%	104
HH member took pet to vet in last 12 months: 4 times	894	4.1%	115
HH member took pet to vet in last 12 months: 5+ times	1,389	6.4%	126

Data Note: An MPI (Market Potential Index) measures the relative likelihood of households in the specified trade area to exhibit certain consumer behavior or purchasing patterns compared to the U.S. An MPI of 100 represents the U.S. average.

Source: These data are based upon national propensities to use various products and services, applied to local demographic composition. Usage data were collected by GfK MRI in a nationally representative survey of U.S. households. Esri forecasts for 2015 and 2020.

October 31, 2015



TOWNSHIP OF BYRAM Market Analysis Report



Pets and Products Market Potential

Byram 3,5,10-miles
10 Mansfield Dr, Byram Twp, New Jersey, 07874
Ring: 10 mile radius

Prepared by Esri
Latitude: 40.93709
Longitude: -74.70656

Demographic Summary		2015	2020
Population		231,864	233,589
Population 18+		179,919	184,880
Households		85,623	86,464
Median Household Income		\$85,683	\$96,020
Product/Consumer Behavior	Expected Number of Households	Percent	MPI
HH owns any pet	46,905	54.8%	103
HH owns any bird	2,259	2.6%	94
HH owns any cat	19,300	22.5%	99
HH owns any dog	33,892	39.6%	99
HH owns 1 cat	10,802	12.6%	102
HH owns 2+ cats	8,502	9.9%	94
HH owns 1 dog	22,433	26.2%	109
HH owns 2+ dogs	11,455	13.4%	84
HH used canned/wet cat food in last 6 months	10,785	12.6%	107
HH used <4 containers of cat food in last 7 days	3,778	4.4%	94
HH used 8+ containers of cat food in last 7 days	3,159	3.7%	115
HH used packaged dry cat food in last 6 months	18,492	21.6%	99
HH used <4 pounds pkgd dry cat food last 30 days	6,175	7.2%	106
HH used 9+ pounds pkgd dry cat food last 30 days	7,576	8.8%	88
HH used cat treats in last 6 months	9,607	11.2%	99
HH used 3+ packages of cat treats in last 30 days	2,806	3.3%	90
HH used cat litter in last 6 months	17,298	20.2%	103
HH used 21+ pounds of cat litter in last 30 days	4,807	5.6%	99
HH used canned/wet dog food in last 6 months	12,337	14.4%	101
HH used <3 containers of dog food in last 7 days	5,818	6.8%	103
HH used 7+ containers of dog food in last 7 days	3,951	4.6%	98
HH used packaged dry dog food in last 6 months	32,521	38.0%	100
HH used <10 pounds pkgd dry dog food last 30 days	15,333	17.9%	102
HH used 25+ pounds pkgd dry dog food last 30 days	9,085	10.6%	92
HH used dog biscuits/treats in last 6 months	27,668	32.3%	103
HH used 3+ pkgs dog biscuits/treats last 30 days	7,355	8.6%	101
HH used flea/tick/parasite product for cat/dog	29,929	35.0%	98
HH Bought pet food from any pet specialty store/12 mo	22,125	25.8%	125
HH Bought pet food in last 12 months: from discount store	7,123	8.3%	84
HH Bought pet food in last 12 months: from grocery store	22,008	25.7%	94
HH Bought pet food in last 12 months: from PETCO	9,513	11.1%	130
HH Bought pet food in last 12 months: from PetSmart	12,127	14.2%	123
HH Bought pet food in last 12 months: from wholesale club	4,552	5.3%	119
HH Bought pet food in last 12 months: from vet	4,243	5.0%	108
HH Bought flea control product from vet in last 12 mo	10,726	12.5%	103
HH member took pet to vet in last 12 months: 1 time	11,251	13.1%	102
HH member took pet to vet in last 12 months: 2 times	10,501	12.3%	106
HH member took pet to vet in last 12 months: 3 times	5,050	5.9%	104
HH member took pet to vet in last 12 months: 4 times	3,243	3.8%	107
HH member took pet to vet in last 12 months: 5+ times	5,106	6.0%	118

Data Note: An MPI (Market Potential Index) measures the relative likelihood of households in the specified trade area to exhibit certain consumer behavior or purchasing patterns compared to the U.S. An MPI of 100 represents the U.S. average.

Source: These data are based upon national propensities to use various products and services, applied to local demographic composition. Usage data were collected by GfK MRI in a nationally representative survey of U.S. households. Esri forecasts for 2015 and 2020.

October 31, 2015



TOWNSHIP OF BYRAM Market Analysis Report



Medical Expenditures

Byram 3,5,10-miles
10 Mansfield Dr, Byram Twp, New Jersey, 07874
Ring: 3 mile radius

Prepared by Esri
Latitude: 40.93709
Longitude: -74.70656

Demographic Summary		2015	2020
Population		26,249	26,156
Households		9,919	9,923
Families		7,166	7,177
Median Household Income		\$84,048	\$92,737
Males per 100 Females		99.0	99.7
Population By Age			
Population <5 Years		5.4%	5.2%
Population 65+ Years		13.1%	15.9%
Median Age		41.3	42.1
	Spending Potential Index	Average Amount Spent	Total
Health Care	128	\$6,082.75	\$60,334,836
Medical Care	126	\$2,648.29	\$26,268,373
Physician Services	130	\$347.22	\$3,444,095
Dental Services	144	\$557.09	\$5,525,809
Eyecare Services	123	\$68.15	\$675,956
Lab Tests, X-Rays	118	\$79.29	\$786,491
Hospital Room and Hospital Services	107	\$216.89	\$2,151,361
Convalescent or Nursing Home Care	102	\$32.18	\$319,233
Other Medical services (1)	137	\$158.01	\$1,567,311
Nonprescription Drugs	120	\$155.61	\$1,543,482
Prescription Drugs	120	\$597.24	\$5,924,064
Nonprescription Vitamins	131	\$91.95	\$912,077
Medicare Prescription Drug Premium	113	\$99.16	\$983,611
Eyeglasses and Contact Lenses	133	\$119.56	\$1,185,876
Hearing Aids	140	\$37.84	\$375,350
Medical Equipment for General Use	136	\$8.22	\$81,531
Other Medical Supplies (2)	124	\$79.86	\$792,125
Health Insurance	130	\$3,434.47	\$34,066,463
Blue Cross/Blue Shield	132	\$1,131.97	\$11,228,055
Commercial Health Insurance	130	\$648.82	\$6,435,608
Health Maintenance Organization	139	\$618.79	\$6,137,813
Medicare Payments	116	\$606.79	\$6,018,702
Long Term Care Insurance	151	\$152.64	\$1,514,085
Other Health Insurance (3)	124	\$275.45	\$2,732,200

Data Note: The Spending Potential Index (SPI) is household-based, and represents the amount spent for a product or service relative to a national average of 100. Detail may not sum to totals due to rounding.

(1) Other Medical Services includes Services by Medical Professionals other than Physicians, Nursing Services, Therapeutic Treatments, Blood Donation, Ambulance, Emergency Room, and Outpatient Hospital Services

(2) Other Medical Supplies includes Topicals, Dressings, Supportive and Convalescent Medical Equipment, Rental of Medical Equipment for General Use, and Rental of Supportive and Convalescent Medical Equipment.

(3) Other Health Insurance includes Medicare Supplements and Other Health Insurance excluding Blue Cross/Blue Shield.

Source: Esri forecasts for 2015 and 2020; Consumer Spending data are derived from the 2011 and 2012 Consumer Expenditure Surveys, Bureau of Labor statistics

October 31, 2015



TOWNSHIP OF BYRAM Market Analysis Report



Medical Expenditures

Byram 3,5,10-miles
10 Mansfield Dr, Byram Twp, New Jersey, 07874
Ring: 5 mile radius

Prepared by Esri
Latitude: 40.93709
Longitude: -74.70656

Demographic Summary		2015	2020
Population		56,895	57,036
Households		21,817	21,928
Families		15,501	15,607
Median Household Income		\$84,853	\$93,750
Males per 100 Females		98.0	98.3
Population By Age			
Population <5 Years		5.2%	5.0%
Population 65+ Years		14.1%	16.9%
Median Age		42.2	43.2
	Spending Potential Index	Average Amount Spent	Total
Health Care	134	\$6,376.23	\$139,110,241
Medical Care	132	\$2,778.89	\$60,626,955
Physician Services	137	\$364.32	\$7,948,338
Dental Services	149	\$577.25	\$12,593,813
Eyecare Services	130	\$71.82	\$1,566,974
Lab Tests, X-Rays	125	\$83.78	\$1,827,909
Hospital Room and Hospital Services	115	\$232.35	\$5,069,187
Convalescent or Nursing Home Care	107	\$33.79	\$737,098
Other Medical services (1)	143	\$163.96	\$3,577,064
Nonprescription Drugs	127	\$163.77	\$3,573,077
Prescription Drugs	127	\$630.01	\$13,744,834
Nonprescription Vitamins	136	\$95.47	\$2,082,846
Medicare Prescription Drug Premium	119	\$104.80	\$2,286,429
Eyeglasses and Contact Lenses	139	\$124.94	\$2,725,723
Hearing Aids	147	\$39.68	\$865,752
Medical Equipment for General Use	141	\$8.54	\$186,275
Other Medical Supplies (2)	131	\$84.41	\$1,841,637
Health Insurance	136	\$3,597.35	\$78,483,286
Blue Cross/Blue Shield	139	\$1,186.87	\$25,893,916
Commercial Health Insurance	138	\$685.16	\$14,948,172
Health Maintenance Organization	143	\$639.00	\$13,941,080
Medicare Payments	122	\$640.55	\$13,974,874
Long Term Care Insurance	157	\$158.02	\$3,447,414
Other Health Insurance (3)	130	\$287.75	\$6,277,830

Data Note: The Spending Potential Index (SPI) is household-based, and represents the amount spent for a product or service relative to a national average of 100. Detail may not sum to totals due to rounding.

(1) Other Medical Services includes Services by Medical Professionals other than Physicians, Nursing Services, Therapeutic Treatments, Blood Donation, Ambulance, Emergency Room, and Outpatient Hospital Services

(2) Other Medical Supplies includes Topicals, Dressings, Supportive and Convalescent Medical Equipment, Rental of Medical Equipment for General Use, and Rental of Supportive and Convalescent Medical Equipment.

(3) Other Health Insurance includes Medicare Supplements and Other Health Insurance excluding Blue Cross/Blue Shield.

Source: Esri forecasts for 2015 and 2020; Consumer Spending data are derived from the 2011 and 2012 Consumer Expenditure Surveys, Bureau of Labor statistics

October 31, 2015



TOWNSHIP OF BYRAM Market Analysis Report



Medical Expenditures

Byram 3,5,10-miles
10 Mansfield Dr, Byram Twp, New Jersey, 07874
Ring: 10 mile radius

Prepared by Esri
Latitude: 40.93709
Longitude: -74.70656

Demographic Summary		2015	2020
Population		231,864	233,589
Households		85,623	86,464
Families		61,275	61,952
Median Household Income		\$85,683	\$96,020
Males per 100 Females		97.2	97.3
Population By Age			
Population <5 Years		5.2%	5.1%
Population 65+ Years		14.4%	16.9%
Median Age		41.6	42.5
	Spending Potential Index	Average Amount Spent	Total
Health Care	142	\$6,746.05	\$577,617,466
Medical Care	141	\$2,955.22	\$253,034,733
Physician Services	146	\$388.19	\$33,237,954
Dental Services	156	\$604.29	\$51,740,947
Eyecare Services	139	\$76.65	\$6,563,030
Lab Tests, X-Rays	134	\$89.91	\$7,698,673
Hospital Room and Hospital Services	126	\$254.61	\$21,800,211
Convalescent or Nursing Home Care	118	\$37.02	\$3,169,627
Other Medical services (1)	152	\$174.20	\$14,915,573
Nonprescription Drugs	137	\$176.58	\$15,118,934
Prescription Drugs	134	\$668.29	\$57,220,698
Nonprescription Vitamins	146	\$102.07	\$8,739,149
Medicare Prescription Drug Premium	125	\$110.28	\$9,442,586
Eyeglasses and Contact Lenses	147	\$132.62	\$11,355,527
Hearing Aids	149	\$40.29	\$3,449,510
Medical Equipment for General Use	147	\$8.91	\$763,001
Other Medical Supplies (2)	141	\$91.32	\$7,819,314
Health Insurance	143	\$3,790.84	\$324,582,733
Blue Cross/Blue Shield	146	\$1,247.18	\$106,787,718
Commercial Health Insurance	148	\$734.29	\$62,872,483
Health Maintenance Organization	152	\$678.13	\$58,063,927
Medicare Payments	128	\$670.85	\$57,440,406
Long Term Care Insurance	159	\$160.59	\$13,750,613
Other Health Insurance (3)	135	\$299.77	\$25,667,587

Data Note: The Spending Potential Index (SPI) is household-based, and represents the amount spent for a product or service relative to a national average of 100. Detail may not sum to totals due to rounding.

(1) Other Medical Services includes Services by Medical Professionals other than Physicians, Nursing Services, Therapeutic Treatments, Blood Donation, Ambulance, Emergency Room, and Outpatient Hospital Services

(2) Other Medical Supplies includes Topicals, Dressings, Supportive and Convalescent Medical Equipment, Rental of Medical Equipment for General Use, and Rental of Supportive and Convalescent Medical Equipment.

(3) Other Health Insurance includes Medicare Supplements and Other Health Insurance excluding Blue Cross/Blue Shield.

Source: Esri forecasts for 2015 and 2020; Consumer Spending data are derived from the 2011 and 2012 Consumer Expenditure Surveys, Bureau of Labor statistics

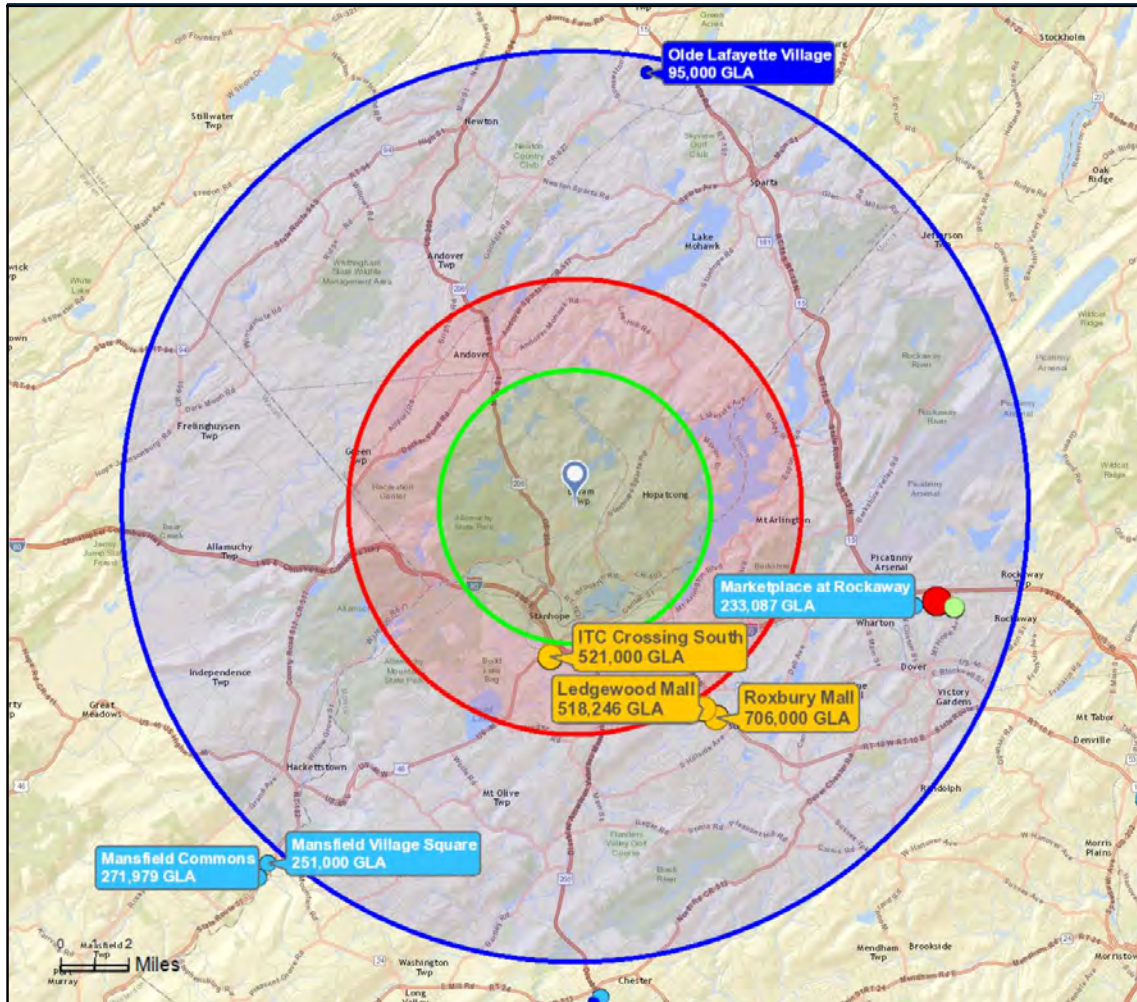
October 31, 2015



Major Shopping Center Map

Byram 3,5,10-miles
10 Mansfield Dr, Byram Twp, New Jersey, 07874
Rings: 3, 5, 10 mile radii

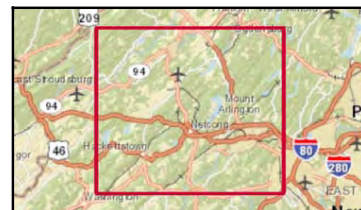
Prepared by Esri
Latitude: 40.93709
Longitude: -74.70656



Source: Directory of Major Malls, Inc.

Gross Leasable Area

- Less than 200,000 sq ft
- 200,001 - 300,000
- 300,001 - 500,000
- 500,001 - 800,000
- More than 800,000



October 31, 2015

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TOWNSHIP OF BYRAM Market Analysis Report



Business Summary

Byram 3,5,10-miles
10 Mansfield Dr, Byram Twp, New Jersey, 07874
Rings: 3, 5, 10 mile radii

Prepared by Esri
Latitude: 40.93709
Longitude: -74.70656

Data for all businesses in area			3 miles		5 miles		10 miles					
Total Businesses:			1,071		2,390		11,172					
Total Employees:			8,229		19,752		111,361					
Total Residential Population:			26,249		56,895		231,864					
Employee/Residential Population Ratio:			0.31:1		0.35:1		0.48:1					
by SIC Codes	Number	Percent	Employees	Percent	Number	Percent	Employees	Percent	Number	Percent	Employees	Percent
Agriculture & Mining	46	4.3%	198	2.4%	95	4.0%	477	2.4%	361	3.2%	1,814	1.6%
Construction	140	13.1%	546	6.6%	311	13.0%	1,285	6.5%	1,224	11.0%	5,889	5.3%
Manufacturing	31	2.9%	753	9.2%	73	3.1%	1,529	7.7%	362	3.2%	13,952	12.5%
Transportation	46	4.3%	581	7.1%	90	3.8%	1,135	5.7%	333	3.0%	3,604	3.2%
Communication	5	0.5%	46	0.6%	11	0.5%	79	0.4%	75	0.7%	594	0.5%
Utility	10	0.9%	36	0.4%	26	1.1%	247	1.3%	65	0.6%	554	0.5%
Wholesale Trade	47	4.4%	254	3.1%	109	4.6%	933	4.7%	519	4.6%	5,112	4.6%
Retail Trade Summary	203	19.0%	1,778	21.6%	485	20.3%	5,439	27.5%	2,397	21.5%	27,829	25.0%
Home Improvement	15	1.4%	45	0.5%	29	1.2%	363	1.8%	137	1.2%	1,755	1.6%
General Merchandise Stores	8	0.7%	44	0.5%	17	0.7%	494	2.5%	79	0.7%	3,705	3.3%
Food Stores	23	2.1%	776	9.4%	53	2.2%	1,360	6.9%	233	2.1%	5,769	5.2%
Auto Dealers, Gas Stations, Auto Aftermarket	26	2.4%	267	3.2%	57	2.4%	590	3.0%	286	2.6%	2,093	1.9%
Apparel & Accessory Stores	5	0.5%	27	0.3%	17	0.7%	170	0.9%	181	1.6%	1,840	1.7%
Furniture & Home Furnishings	21	2.0%	69	0.8%	57	2.4%	458	2.3%	247	2.2%	1,713	1.5%
Eating & Drinking Places	58	5.4%	397	4.8%	137	5.7%	1,463	7.4%	621	5.6%	7,013	6.3%
Miscellaneous Retail	47	4.4%	153	1.9%	116	4.9%	540	2.7%	612	5.5%	3,941	3.5%
Finance, Insurance, Real Estate Summary	88	8.2%	306	3.7%	200	8.4%	888	4.5%	958	8.6%	4,957	4.5%
Banks, Savings & Lending Institutions	44	4.1%	72	0.9%	91	3.8%	204	1.0%	402	3.6%	1,467	1.3%
Securities Brokers	6	0.6%	13	0.2%	10	0.4%	22	0.1%	57	0.5%	192	0.2%
Insurance Carriers & Agents	8	0.7%	21	0.3%	24	1.0%	98	0.5%	128	1.1%	816	0.7%
Real Estate, Holding, Other Investment Offices	29	2.7%	201	2.4%	76	3.2%	563	2.9%	370	3.3%	2,482	2.2%
Services Summary	361	33.7%	2,949	35.8%	812	34.0%	6,295	31.9%	4,119	36.9%	41,005	36.8%
Hotels & Lodging	10	0.9%	137	1.7%	24	1.0%	335	1.7%	49	0.4%	1,238	1.1%
Automotive Services	41	3.8%	142	1.7%	80	3.3%	266	1.3%	367	3.3%	1,323	1.2%
Motion Pictures & Amusements	31	2.9%	212	2.6%	65	2.7%	360	1.8%	332	3.0%	2,248	2.0%
Health Services	19	1.8%	107	1.3%	62	2.6%	444	2.2%	607	5.4%	10,698	9.6%
Legal Services	6	0.6%	37	0.4%	15	0.6%	70	0.4%	127	1.1%	605	0.5%
Education Institutions & Libraries	31	2.9%	1,176	14.3%	52	2.2%	1,758	8.9%	243	2.2%	9,524	8.6%
Other Services	223	20.8%	1,138	13.8%	514	21.5%	3,063	15.5%	2,393	21.4%	15,369	13.8%
Government	55	5.1%	717	8.7%	97	4.1%	1,307	6.6%	384	3.4%	5,438	4.9%
Unclassified Establishments	41	3.8%	65	0.8%	83	3.5%	139	0.7%	376	3.4%	613	0.6%
Totals	1,071	100.0%	8,229	100.0%	2,390	100.0%	19,752	100.0%	11,172	100.0%	111,361	100.0%

Source: Copyright 2015 Infogroup, Inc. All rights reserved. Esri Total Residential Population forecasts for 2015.

October 31, 2015

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TOWNSHIP OF BYRAM

Market Analysis Report



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by NAICS Codes	Businesses		Employees		Businesses		Employees		Businesses		Employees	
	Number	Percent	Number	Percent	Number	Percent	Number	Percent	Number	Percent	Number	Percent
Agriculture, Forestry, Fishing & Hunting	7	0.7%	24	0.3%	11	0.5%	33	0.2%	38	0.3%	118	0.1%
Mining	4	0.4%	10	0.1%	4	0.2%	10	0.1%	17	0.2%	88	0.1%
Utilities	6	0.6%	24	0.3%	12	0.5%	98	0.5%	36	0.3%	281	0.3%
Construction	148	13.8%	607	7.4%	329	13.8%	1,391	7.0%	1,316	11.8%	6,293	5.7%
Manufacturing	32	3.0%	757	9.2%	74	3.1%	1,540	7.8%	392	3.5%	13,819	12.4%
Wholesale Trade	45	4.2%	236	2.9%	101	4.2%	872	4.4%	495	4.4%	4,988	4.5%
Retail Trade	138	12.9%	1,334	16.2%	331	13.8%	3,863	19.6%	1,684	15.1%	20,164	18.1%
Motor Vehicle & Parts Dealers	16	1.5%	239	2.9%	36	1.5%	515	2.6%	220	2.0%	1,834	1.6%
Furniture & Home Furnishings Stores	4	0.4%	10	0.1%	16	0.7%	104	0.5%	79	0.7%	507	0.5%
Electronics & Appliance Stores	15	1.4%	55	0.7%	38	1.6%	346	1.8%	146	1.3%	1,078	1.0%
Bldg Material & Garden Equipment & Supplies Dealers	15	1.4%	45	0.5%	29	1.2%	363	1.8%	137	1.2%	1,754	1.6%
Food & Beverage Stores	21	2.0%	747	9.1%	43	1.8%	1,187	6.0%	181	1.6%	5,334	4.8%
Health & Personal Care Stores	8	0.7%	60	0.7%	27	1.1%	272	1.4%	164	1.5%	1,344	1.2%
Gasoline Stations	10	0.9%	28	0.3%	21	0.9%	75	0.4%	67	0.6%	259	0.2%
Clothing & Clothing Accessories Stores	10	0.9%	36	0.4%	26	1.1%	189	1.0%	231	2.1%	2,007	1.8%
Sport Goods, Hobby, Book, & Music Stores	10	0.9%	27	0.3%	22	0.9%	99	0.5%	100	0.9%	867	0.8%
General Merchandise Stores	8	0.7%	44	0.5%	17	0.7%	494	2.5%	79	0.7%	3,705	3.3%
Miscellaneous Store Retailers	15	1.4%	27	0.3%	41	1.7%	178	0.9%	240	2.1%	1,066	1.0%
Nonstore Retailers	6	0.6%	17	0.2%	15	0.6%	39	0.2%	42	0.4%	408	0.4%
Transportation & Warehousing	41	3.8%	540	6.6%	78	3.3%	1,037	5.3%	257	2.3%	3,165	2.8%
Information	15	1.4%	93	1.1%	34	1.4%	168	0.9%	176	1.6%	1,742	1.6%
Finance & Insurance	59	5.5%	105	1.3%	124	5.2%	324	1.6%	591	5.3%	2,482	2.2%
Central Bank/Credit Intermediation & Related Activities	44	4.1%	72	0.9%	91	3.8%	204	1.0%	403	3.6%	1,470	1.3%
Securities, Commodity Contracts & Other Financial	6	0.6%	13	0.2%	10	0.4%	22	0.1%	57	0.5%	193	0.2%
Insurance Carriers & Related Activities; Funds, Trusts &	8	0.7%	21	0.3%	24	1.0%	98	0.5%	130	1.2%	820	0.7%
Real Estate, Rental & Leasing	39	3.6%	237	2.9%	95	4.0%	653	3.3%	453	4.1%	2,685	2.4%
Professional, Scientific & Tech Services	64	6.0%	314	3.8%	188	7.9%	996	5.0%	933	8.4%	5,381	4.8%
Legal Services	8	0.7%	41	0.5%	18	0.8%	76	0.4%	141	1.3%	672	0.6%
Management of Companies & Enterprises	1	0.1%	2	0.0%	2	0.1%	6	0.0%	11	0.1%	59	0.1%
Administrative & Support & Waste Management & Remediation	67	6.3%	406	4.9%	132	5.5%	866	4.4%	596	5.3%	3,778	3.4%
Educational Services	37	3.5%	1,196	14.5%	66	2.8%	1,816	9.2%	329	2.9%	9,693	8.7%
Health Care & Social Assistance	35	3.3%	260	3.2%	105	4.4%	1,004	5.1%	834	7.5%	13,953	12.5%
Arts, Entertainment & Recreation	25	2.3%	196	2.4%	53	2.2%	313	1.6%	223	2.0%	1,689	1.5%
Accommodation & Food Services	73	6.8%	576	7.0%	175	7.3%	1,902	9.6%	722	6.5%	8,704	7.8%
Accommodation	10	0.9%	137	1.7%	24	1.0%	335	1.7%	49	0.4%	1,238	1.1%
Food Services & Drinking Places	64	6.0%	439	5.3%	151	6.3%	1,567	7.9%	673	6.0%	7,465	6.7%
Other Services (except Public Administration)	142	13.3%	528	6.4%	295	12.3%	1,393	7.1%	1,299	11.6%	6,086	5.5%
Automotive Repair & Maintenance	27	2.5%	106	1.3%	57	2.4%	203	1.0%	277	2.5%	1,013	0.9%
Public Administration	55	5.1%	717	8.7%	97	4.1%	1,307	6.6%	386	3.5%	5,498	4.9%
Unclassified Establishments	39	3.6%	68	0.8%	83	3.5%	160	0.8%	381	3.4%	694	0.6%
Total	1,071	100.0%	8,229	100.0%	2,390	100.0%	19,752	100.0%	11,172	100.0%	111,361	100.0%

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October 31, 2015



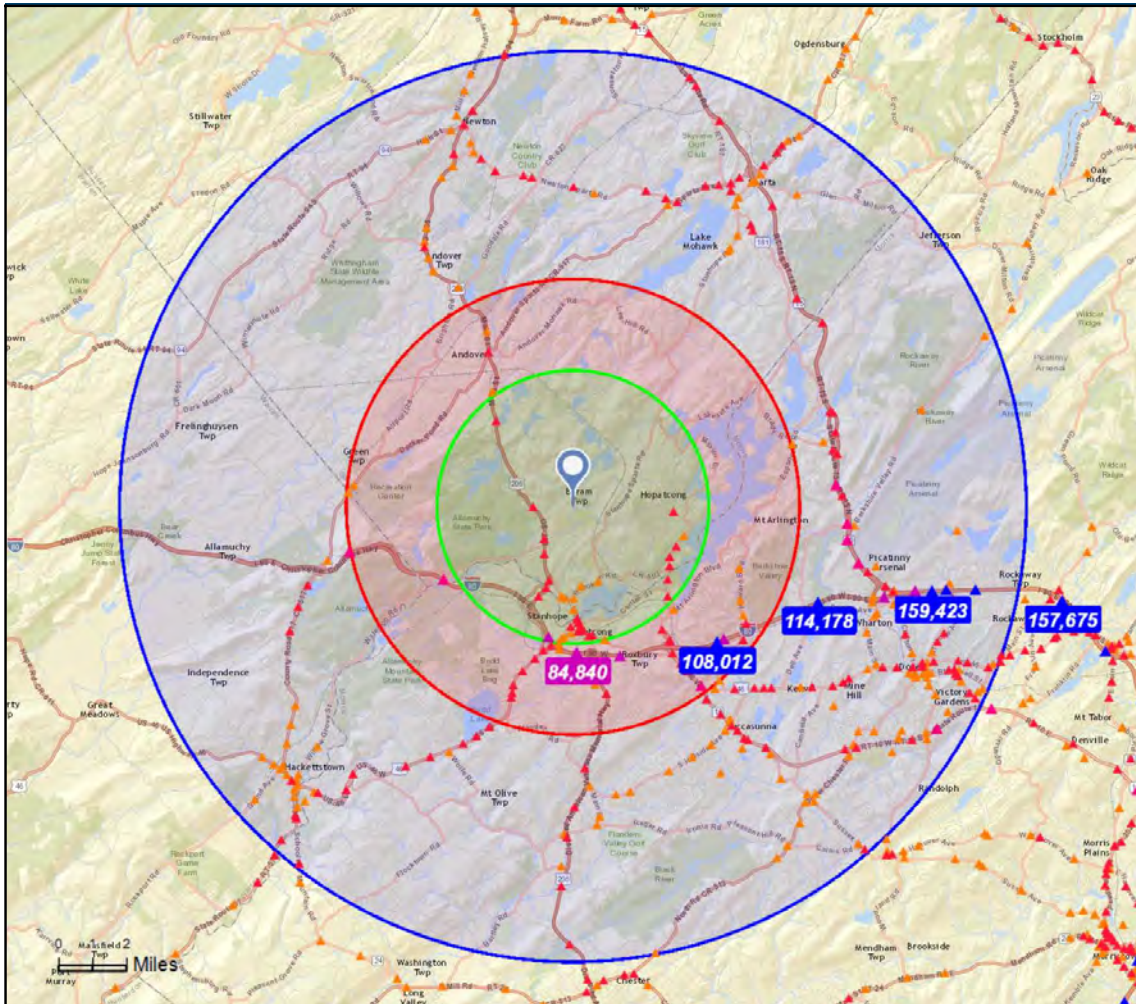
TOWNSHIP OF BYRAM Market Analysis Report



Traffic Count Map

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10 Mansfield Dr, Byram Twp, New Jersey, 07874
Rings: 3, 5, 10 mile radii

Prepared by Esri
Latitude: 40.93709
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Average Daily Traffic Volume
 ▲ Up to 6,000 vehicles per day
 ▲ 6,001 - 15,000
 ▲ 15,001 - 30,000
 ▲ 30,001 - 50,000
 ▲ 50,001 - 100,000
 ▲ More than 100,000 per day



Source: ©2015 Market Planning Solutions, Inc.

October 31, 2015

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TOWNSHIP OF BYRAM Market Analysis Report



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Distance:	Street:	Closest Cross-street:	Year of Count:	Count:
0.38	Lackawanna Dr	Bells Ln (0.04 miles SW)	2011	4,939
0.81	Stanhope Sparta Rd	Lenape Dr (0.59 miles S)	2013	5,342
0.89	US Hwy 206	High Glen Dr (0.29 miles SE)	1998	18,040
0.94	US Hwy 206	Hartman Ln (0.01 miles S)	2011	22,177
1.12	Lackawanna Dr	Orchard St (0.04 miles SW)	2013	3,584
1.16	Waterloo Rd	Hamblin Ln (0.01 miles SW)	2008	4,337
1.20	US Hwy 206	Acorn St (0.08 miles S)	2008	24,204
1.25	Stanhope Sparta Rd	Lenape Dr (0.02 miles S)	1998	3,000
1.36	Stanhope Sparta Rd	Columbia Valley Rd (0.52 miles N)	2013	5,955
1.43	Waterloo Rd	Sussex St (0.10 miles NE)	2013	4,315
1.55	Stanhope Sparta Rd	Smith St (0.04 miles N)	2011	5,699
1.70	US Hwy 206	State Rte 183 (0.25 miles N)	2007	19,332
1.70	Waterloo Rd	River Rd (0.06 miles E)	2011	3,085
1.71	Co Rd 602	Spring St (0.04 miles NE)	2008	11,117
1.75	Co Rd 602	Grove Rd (0.04 miles E)	2013	10,523
1.75	Dell Rd	State Rte 183 (0.04 miles SW)	2000	2,606
1.76	Co Rd 602	Canfield St (0.04 miles W)	2013	7,554
1.78	Durban Ave	Staten Trl (0.01 miles W)	2012	1,319
1.85	Flora Ave	Esther St (0.06 miles NE)	2007	4,510
1.87	US Hwy 206	International Dr (0.04 miles SW)	2010	15,859
1.97	State Rte 183	Main St (0.05 miles SE)	1998	12,480
2.01	Co Rd 602	Hill Rd (0.02 miles NE)	2008	8,748
2.01	McKinley St	Co Rd 602 (0.05 miles E)	2012	4,043
2.02	McKinley St	State Rte 183 (0.02 miles W)	2000	8,529
2.10	US Hwy 206	Waterloo Valley Rd (0.02 miles NE)	2013	15,229
2.12	Main St	Bell Ct (0.03 miles NW)	2007	1,818
2.18	Lackawanna Dr	Old Wolf Lake Rd (0.58 miles SW)	2009	2,449
2.20	Hopatchung Rd	Monroe Trl (0.00 miles NW)	1998	18,000
2.26	State Rte 183	Co Rd 602 (0.02 miles SE)	2011	13,830
2.29	Durban Ave	Papakating Rd (0.02 miles NE)	2012	3,829

Data Note: The Traffic Profile displays up to 30 of the closest available traffic counts within the largest radius around your site. The years of the

October 31, 2015



APPENDIX

E. Psychographic summaries

TOWNSHIP OF BYRAM Market Analysis Report



LifeMode Group: Upscale Avenues Pleasantville

2B

Households: 2,674,000

Average Household Size: 2.86

Median Age: 41.9

Median Household Income: \$85,000

WHO ARE WE?

Prosperous domesticity best describes the settled denizens of Pleasantville. Situated principally in older housing in suburban areas in the Northeast (especially in New York and New Jersey) and secondarily in the West (especially in California), these slightly older couples move less than any other market. Many couples have already transitioned to empty nesters; many are still home to adult children. Families own older, single-family homes and maintain their standard of living with dual incomes. These consumers have higher incomes and home values and much higher net worth (Index 400). Older homes require upkeep; home improvement and remodeling projects are a priority—preferably done by contractors. Residents spend their spare time participating in a variety of sports or watching movies. They shop online and in a variety of stores, from upscale to discount, and use the Internet largely for financial purposes.

OUR NEIGHBORHOOD

- Suburban periphery of large metropolitan areas, primarily in Middle Atlantic or Pacific states.
- Most homes owned (and mortgaged) (Index 141).
- Households composed of older married-couple families, more without children under 18, but many with children over 18 years (Index 141).
- Older, single-family homes: two-thirds built before 1970, close to half from 1950 to 1969.
- One of the lowest percentages of vacant housing units at 4.7% (Index 42).
- Suburban households with 1 or 2 vehicles and a longer travel time to work (Index 119).

SOCIOECONOMIC TRAITS

- Education: 64% college educated, 34% with a bachelor's degree or higher.
- Low unemployment at 7.8%, higher labor force participation rate at 67% (Index 107), higher proportion of HHs with 2 or more workers (Index 116).
- Many professionals in finance, information/technology, or management.
- Median household income denotes affluence, with income primarily from salaries, but also from investments (Index 131) or Social Security (Index 108) and retirement income (Index 124).
- Not cost-conscious, these consumers willing to spend more for quality and brands they like.
- Prefer fashion that is classic and timeless as opposed to trendy.
- Use all types of media equally (newspapers, magazines, radio, Internet, TV).

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

Pleasantville



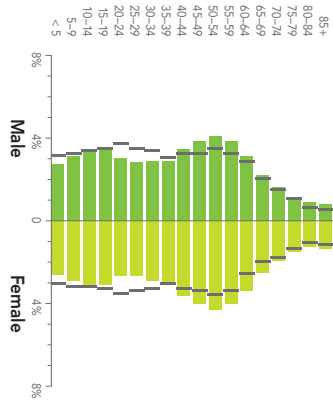
esri.com/tapestry

AGE BY SEX

[Esri data]

Median Age: **41.9** US: 37.6

I Indicates US

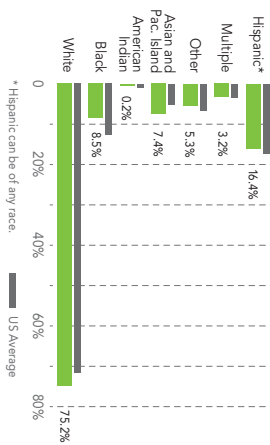


RACE AND ETHNICITY

[Esri data]

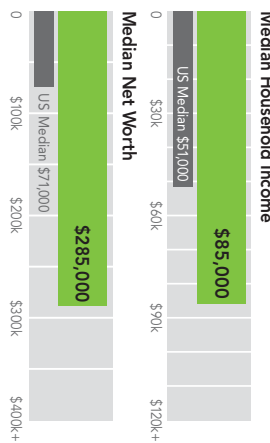
The Diversity Index summarizes racial and ethnic diversity. The index shows the likelihood that two persons, chosen at random from the same area, belong to different race or ethnic groups. The index ranges from 0 (no diversity) to 100 (complete diversity).

Diversity Index: **58.1** US: 62.1



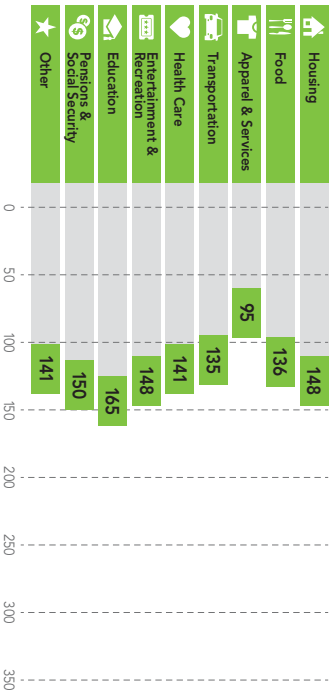
INCOME AND NET WORTH

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



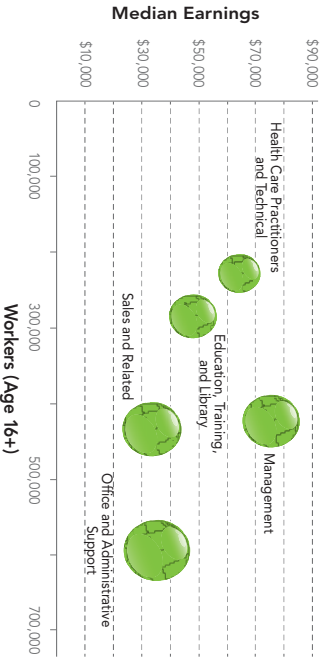
AVERAGE HOUSEHOLD BUDGET INDEX

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.



TOWNSHIP OF BYRAM Market Analysis Report



2B Pleasantville

LifeMode Group: Upscale Avenues



MARKET PROFILE

(Consumer preferences are estimated from data by GfK MRI)

- Prefer imported SUVs, serviced by a gas station or car dealer.
- Invest in conservative securities and contribute to charities.
- Work on home improvement and remodeling projects, but also hire contractors.
- Have bundled services (TV/Internet/phone).
- Access the Internet via fiber optics or cable modem, on a newer computer, to pay bills, make purchases, and track investments.
- Subscribe to premium channels (HBO, Showtime, or Starz) and use video-on-demand to watch TV shows and movies.
- Enjoy outdoor gardening, going to the beach, visiting theme parks, frequenting museums, and attending rock concerts.

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.



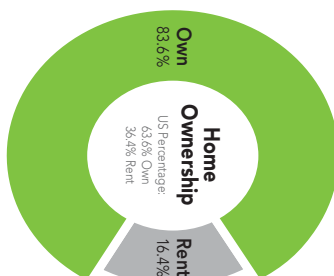
Typical Housing:

Single Family

Median Value:

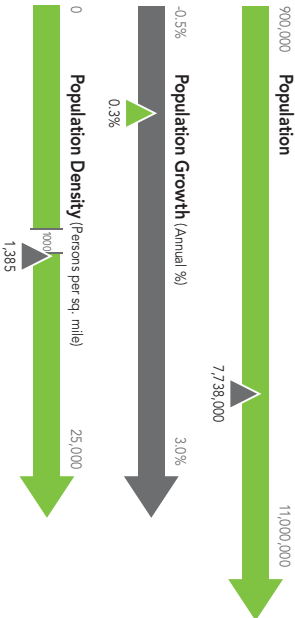
\$312,000

US Median: \$177,000



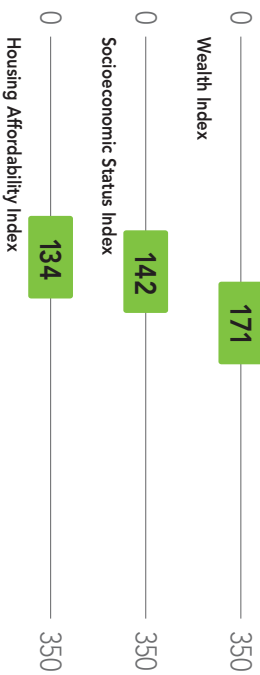
POPULATION CHARACTERISTICS

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.



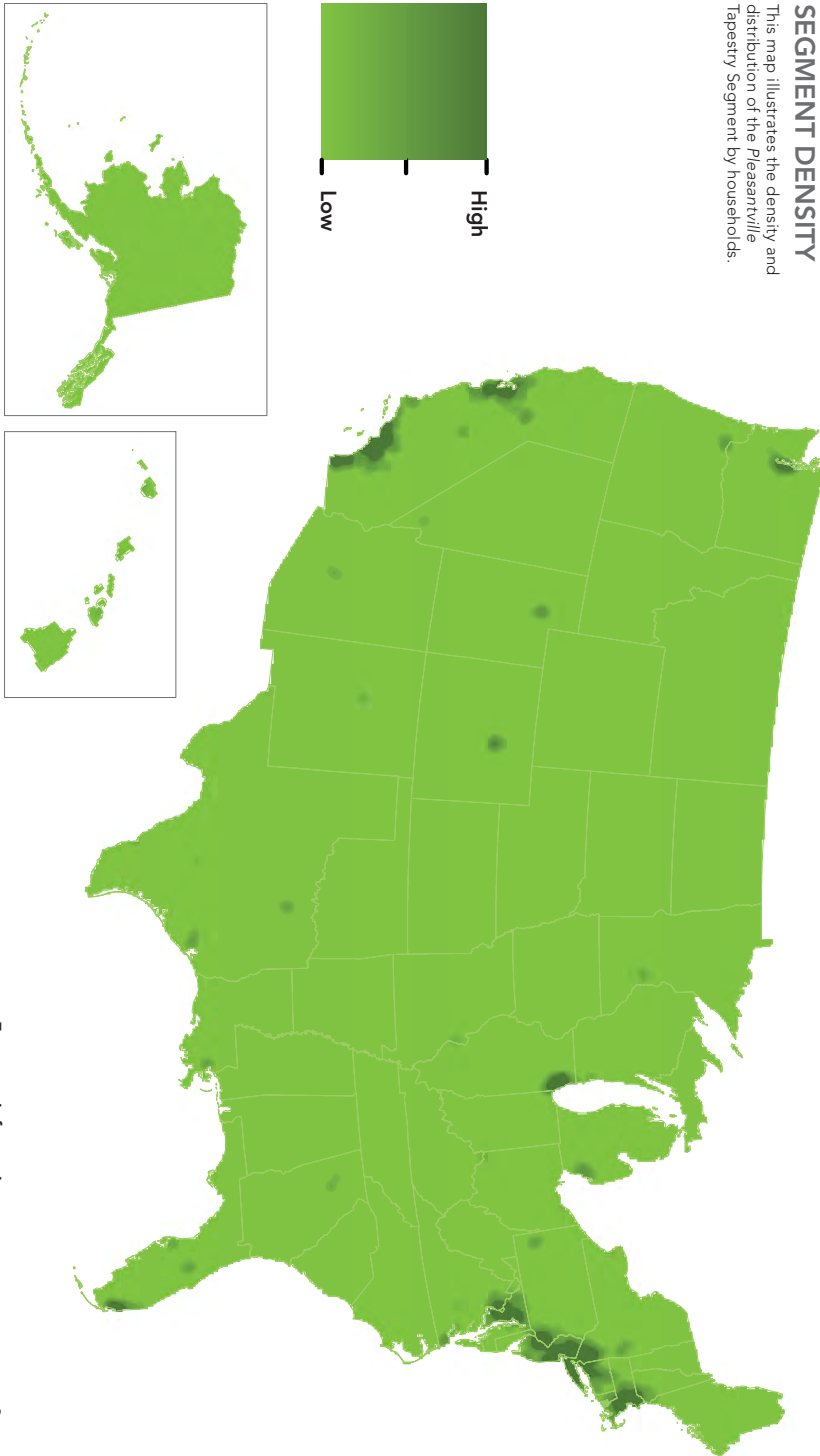
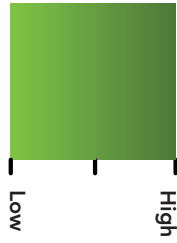


LifeMode Group: Upscale Avenues
Pleasantville



SEGMENT DENSITY

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



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For more information
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info@esri.com
esri.com





LifeMode Group: Family Landscapes

Home Improvement

4B

Households: 2,058,000

Average Household Size: 2.86

Median Age: 37.0

Median Household Income: \$67,000

WHO ARE WE?

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

OUR NEIGHBORHOOD

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

SOCIOECONOMIC TRAITS

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



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



LifeMode Group: Family Landscapes

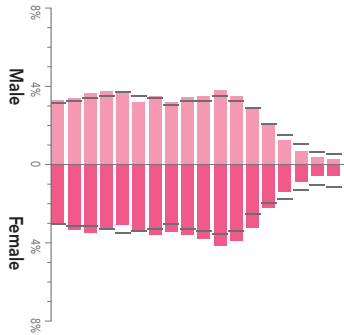
Home Improvement



AGE BY SEX

[Esri data]

Median Age: **37.0** US: 37.6
I indicates US

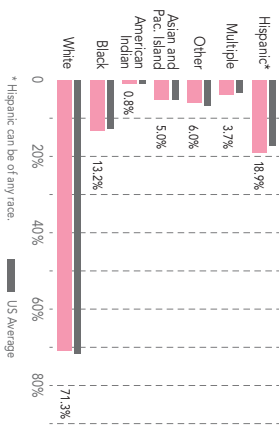


RACE AND ETHNICITY

[Esri data]

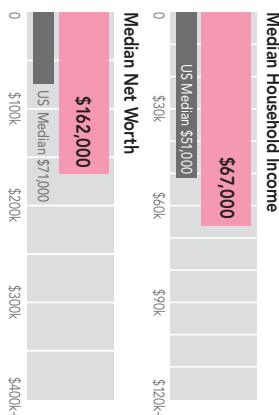
The Diversity Index summarizes racial and ethnic diversity. The index shows the likelihood that two persons, chosen at random from the same area, belong to different race or ethnic groups. The index ranges from 0 (no diversity) to 100 (complete diversity).

Diversity Index: **63.4** US: 62.1



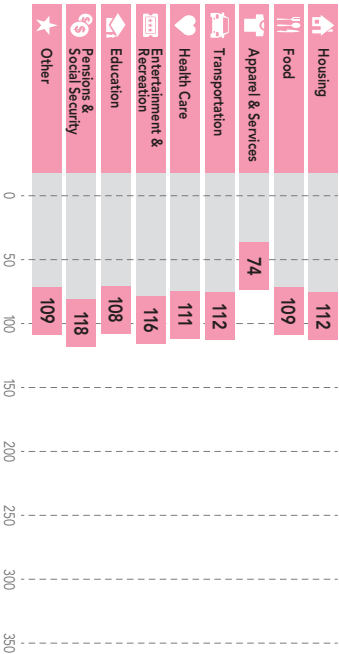
INCOME AND NET WORTH

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



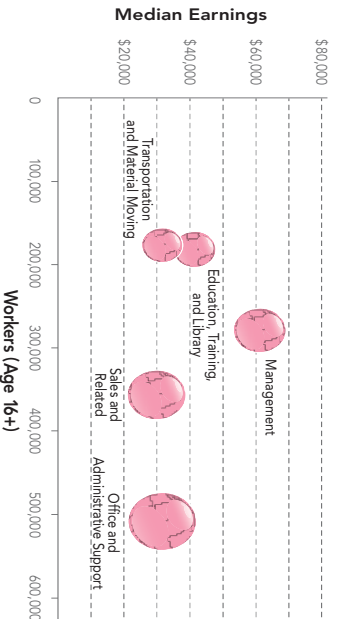
AVERAGE HOUSEHOLD BUDGET INDEX

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.



4B

LifeMode Group: Family Landscapes

Home Improvement



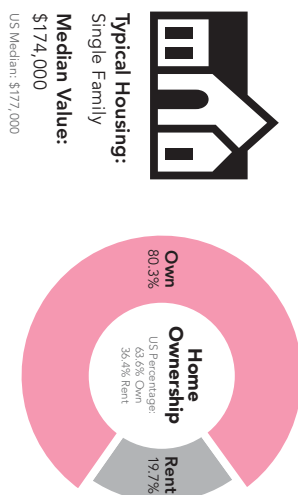
MARKET PROFILE

(Consumer preferences are estimated from data by GfK MRI)

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

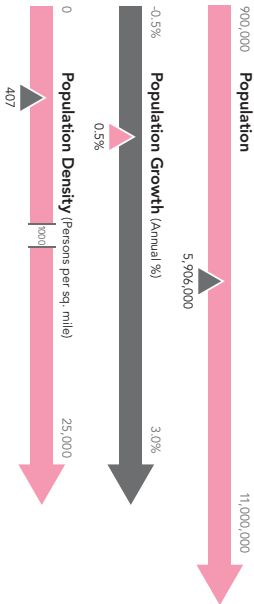
HOUSING

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



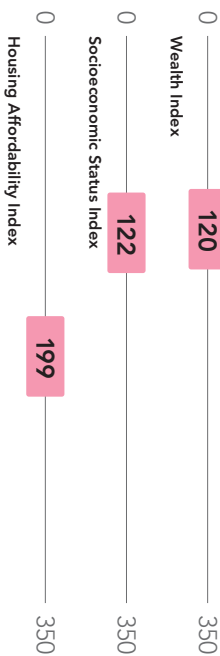
POPULATION CHARACTERISTICS

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.





4B

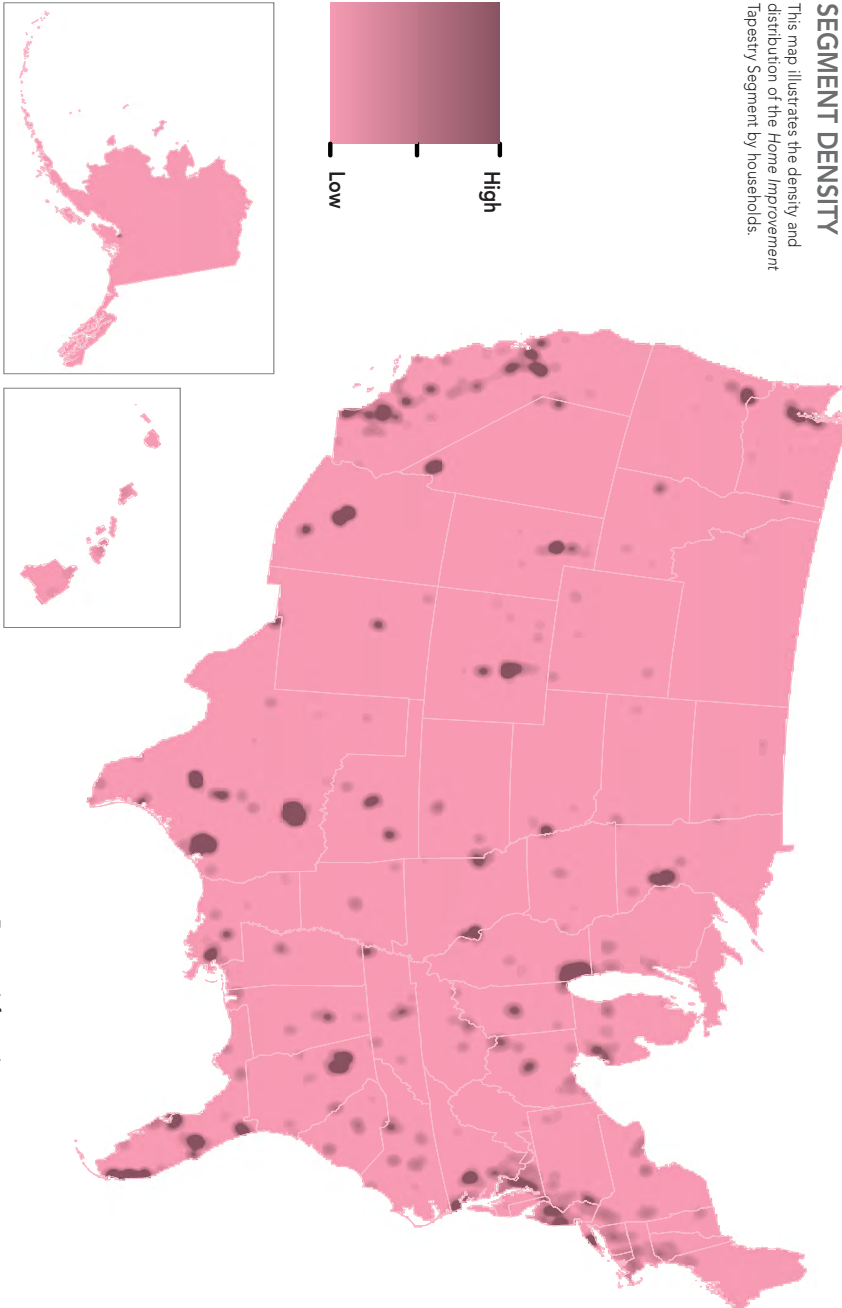
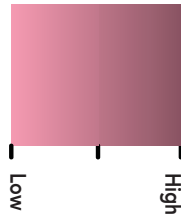
LifeMode Group: Family Landscapes

Home Improvement



SEGMENT DENSITY

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



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esri.com





LifeMode Group: Middle Ground City Lights

8A

Households: 1,759,000

Average Household Size: 2.56

Median Age: 38.8

Median Household Income: \$60,000

WHO ARE WE?

City Lights, a densely populated urban market, is the epitome of equality. The wide-ranging demographic characteristics of residents mirror their passion for social welfare and equal opportunity. Household types range from single person to married-couple families, with and without children. A blend of owners and renters, single-family homes and town homes, midrise and high-rise apartments, these neighborhoods are both racially and ethnically diverse. Many residents have completed some college or a degree, and they earn a good income in professional and service occupations. Willing to commute to their jobs, they work hard and budget well to support their urban lifestyles, laying the foundation for stable financial futures.

OUR NEIGHBORHOOD

- Half of the homes are single-family residences or townhomes.
- Tenure is 50-50: half of households are owned and half are rented. Median home value (Index 182) and average gross rent (Index 129) exceed US values.
- Households include families, both married couples and single parents, as well as singles. The distribution is similar to the US, with slightly more single-person households (Index 109).
- Housing is older in this market: 2 out of 3 homes were built before 1970.
- Most households own one vehicle, but public transportation is still a necessity for daily commutes.

SOCIOECONOMIC TRAITS

- *City Lights* residents earn above average incomes, but lag the nation in net worth.
- Labor force participation exceeds the US average (Index 105). Residents work hard in professional and service occupations but also seek to enjoy life.
- These consumers save for the future, often to achieve their dream of home ownership. They often engage in discussion about financial products and services among their peers. They earn dividend incomes from their portfolios but steer away from risky investments.
- These consumers are price savvy but will pay for quality brands they trust.
- Reflecting the diversity of their neighborhoods, residents stand by their belief in equal opportunity.
- Attuned to nature and the environment, and when they can, purchase natural products.



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.



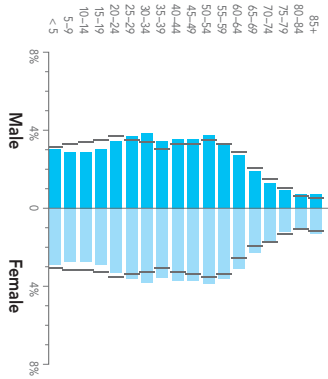
LifeMode Group: Middle Ground

City Lights



AGE BY SEX (Esri data)

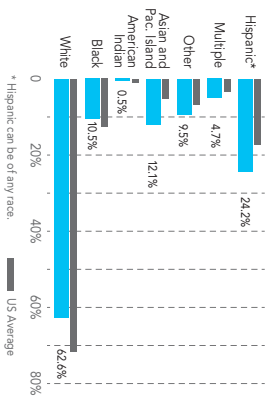
Median Age: 38.8 US: 37.6
1 indicates US



RACE AND ETHNICITY (Esri data)

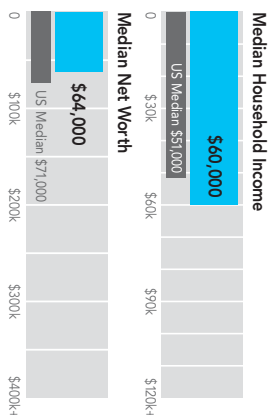
The Diversity Index summarizes racial and ethnic diversity. The index shows the likelihood that two persons, chosen at random from the same area, belong to different race or ethnic groups. The index ranges from 0 (no diversity) to 100 (complete diversity).

Diversity Index: 73.6 US: 62.1



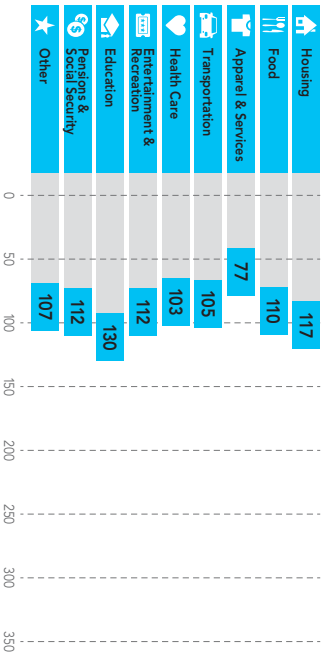
INCOME AND NET WORTH

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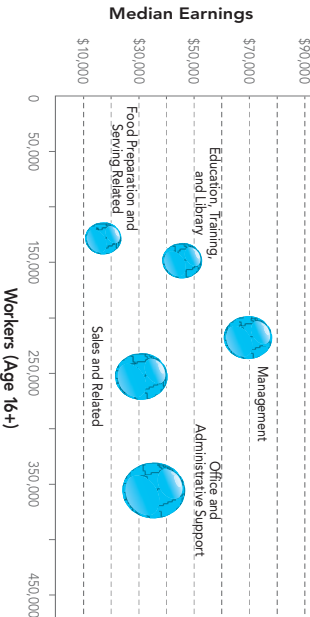
AVERAGE HOUSEHOLD BUDGET INDEX

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.





LifeMode Group: Middle Ground



MARKET PROFILE

(Consumer preferences are estimated from data by GfK MRI)

- Price-conscious consumers, they seek out deals on brands they like at warehouse clubs, Walmart, or Target.
- Residents are traditional in many ways. They prefer to bank in person but are increasingly paying their bills online. They rarely carry a credit card balance but occasionally buy on credit.
- Most residents have high-speed Internet access at home and use their computers for basic browsing and some shopping. They find technology cumbersome, preferring to make a phone call rather than text. They aren't that keen on social media either.
- These are health-conscious consumers, who purchase low-calorie and low-fat food.
- Dreaming of a brighter future, they often try their luck on the lottery.
- Their taste in music is varied, typically classic rock, alternative, or hip hop, and even classical music, listening during their daily commutes.

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.



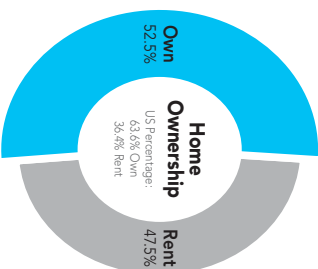
Typical Housing:

Multifunits;
Single Family

Median Value:

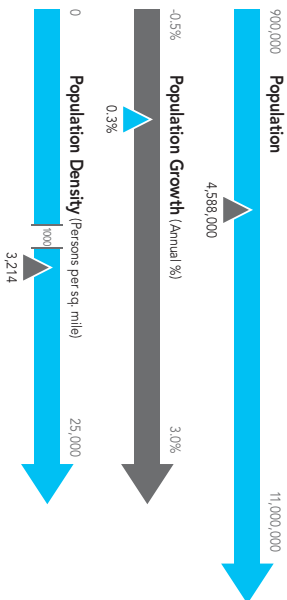
\$323,000

US Median: \$177,000



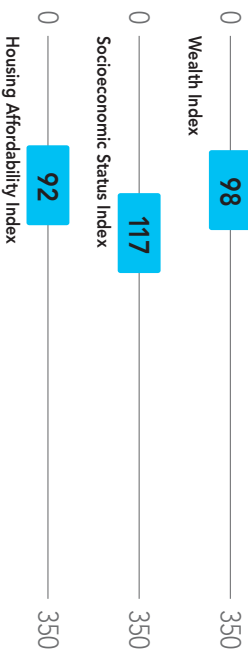
POPULATION CHARACTERISTICS

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: Middle Ground

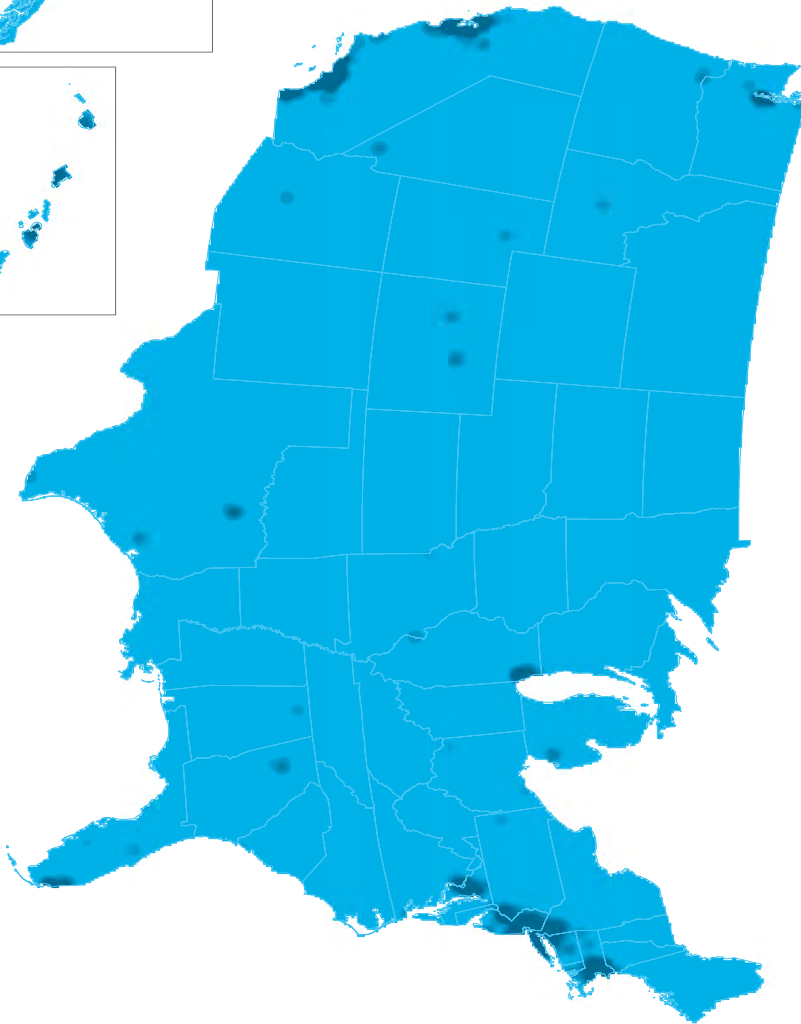
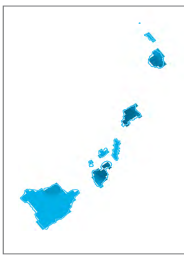
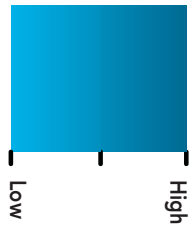
City Lights



**TAPESTRY
SEGMENTATION**
esri.com/tapestry

SEGMENT DENSITY

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



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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.



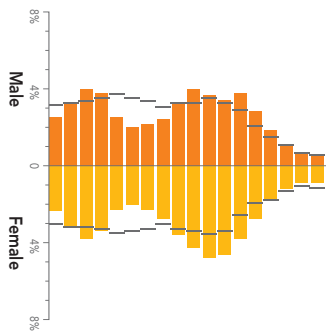
LifeMode Group: Affluent Estates
Savvy Suburbanites



AGE BY SEX

(Esri data)

Median Age: 44.1 US: 37.6
I Indicates US

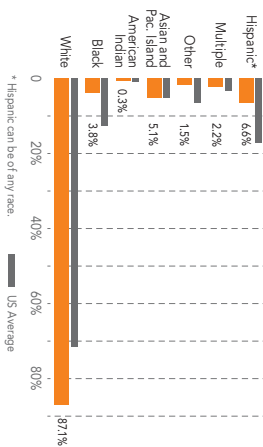


RACE AND ETHNICITY

(Esri data)

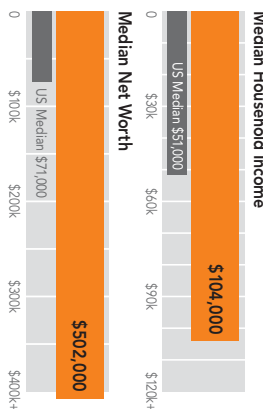
The Diversity Index summarizes racial and ethnic diversity. The index shows the likelihood that two persons, chosen at random from the same area, belong to different race or ethnic groups. The index ranges from 0 (no diversity) to 100 (complete diversity).

Diversity Index: 33.2 US: 62.1



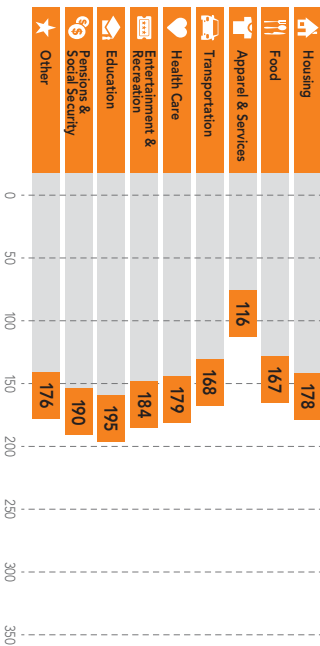
INCOME AND NET WORTH

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.



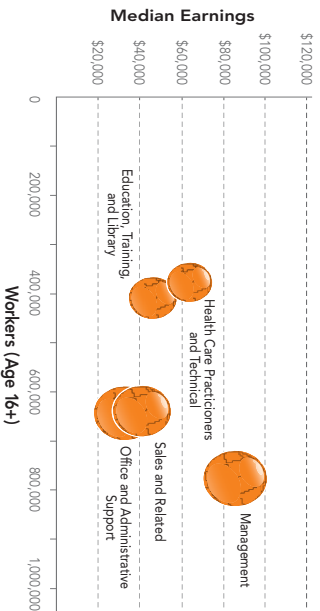
AVERAGE HOUSEHOLD BUDGET INDEX

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.





LifeMode Group: Affluent Estates
Savvy Suburbanites



MARKET PROFILE

(Consumer preferences are estimated from data by GfK MRI)

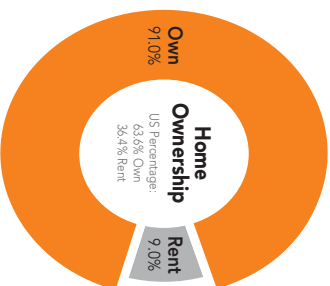
- Residents prefer late model, family-oriented vehicles: SUVs, minivans, and station wagons.
- Gardening and home remodeling are priorities, usually DIY. Riding mowers and power tools are popular, although they also hire contractors for the heavy lifting.
- There is extensive use of housekeeping and 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.

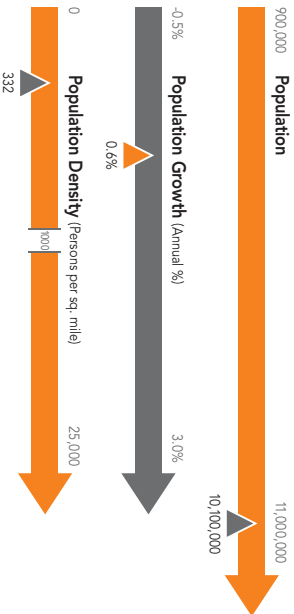


Typical Housing:
Single Family
Median Value:
\$311,000
US Median: \$177,000



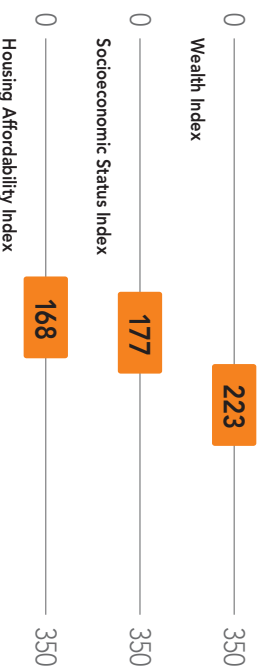
POPULATION CHARACTERISTICS

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.





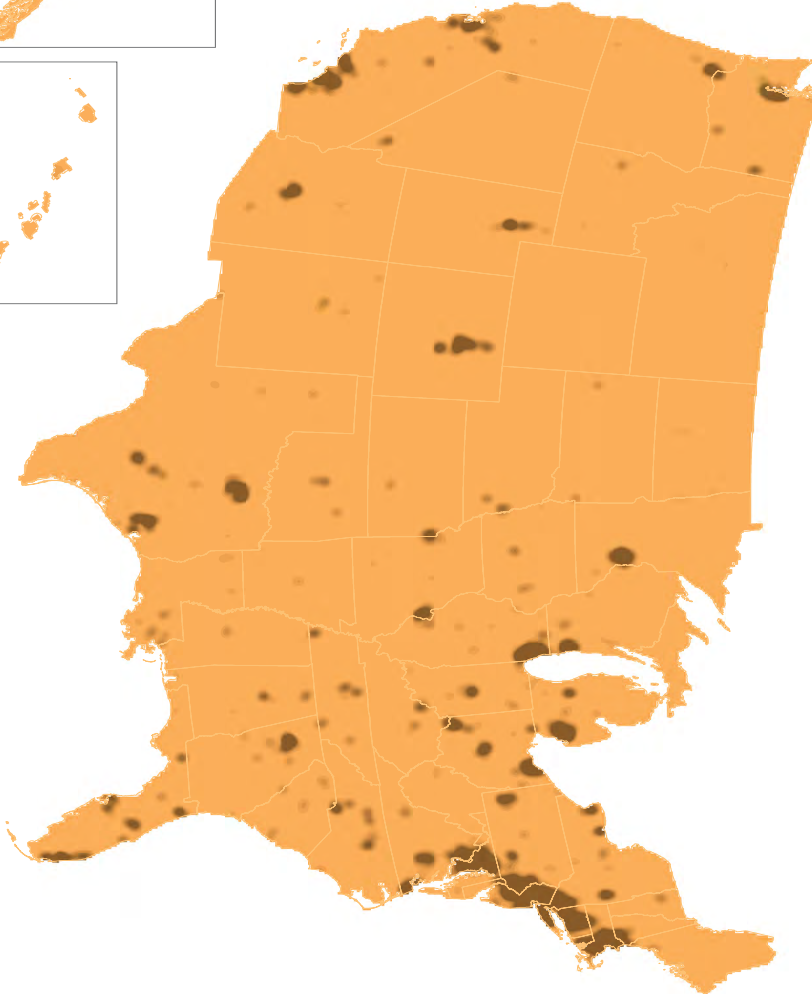
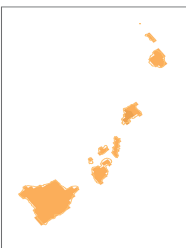
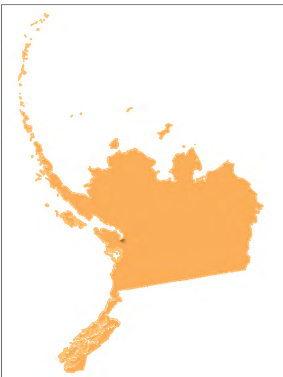
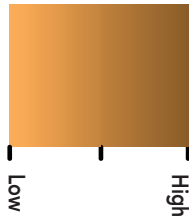
LifeMode Group: Affluent Estates

Savvy Suburbanites



SEGMENT DENSITY

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



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LifeMode Group: Affluent Estates

Professional Pride

1B

Households: 1,878,000

Average Household Size: 3.11

Median Age: 40.5

Median Household Income: \$127,000

WHO ARE WE?

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



OUR NEIGHBORHOOD

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

SOCIOECONOMIC TRAITS

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

Note: The index represents the 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

Professional Pride

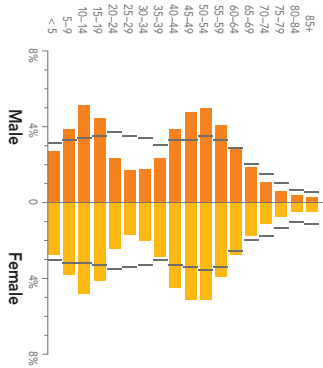


AGE BY SEX

[Esri data]

Median Age: **40.5** US: 37.6

I Indicates US

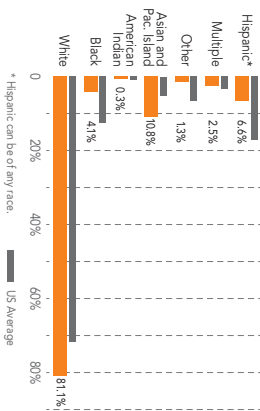


RACE AND ETHNICITY

[Esri data]

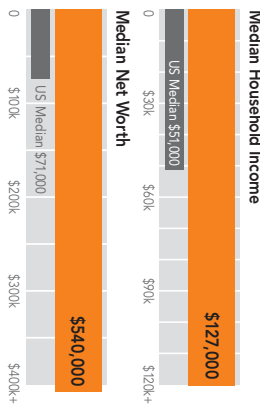
The Diversity Index summarizes racial and ethnic diversity. The index shows the likelihood that two persons, chosen at random from the same area, belong to different race or ethnic groups. The index ranges from 0 (no diversity) to 100 (complete diversity).

Diversity Index: **41.2** US: 62.1



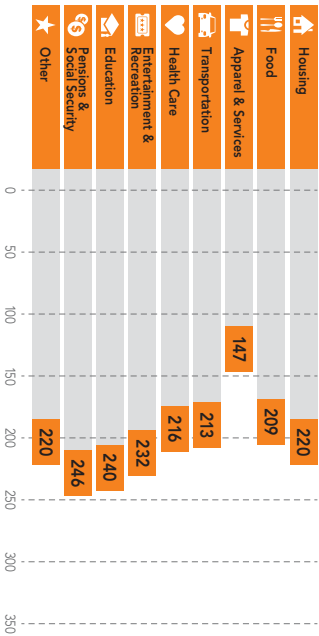
INCOME AND NET WORTH

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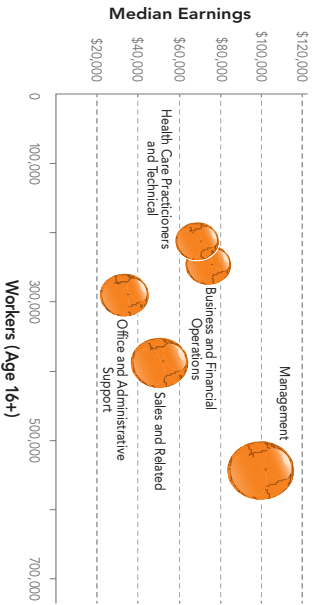
AVERAGE HOUSEHOLD BUDGET INDEX

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.





LifeMode Group: Affluent Estates

Professional Pride



TAPESTRY
SEGMENTATION
esri.com/tapestry

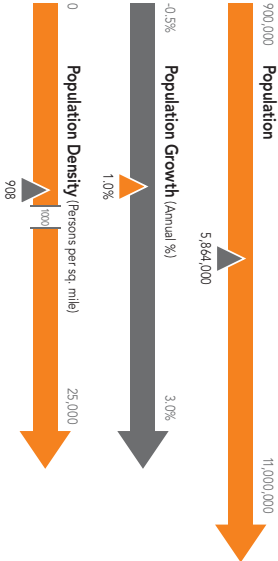
MARKET PROFILE

(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.

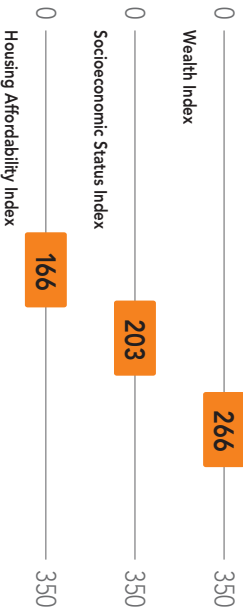
POPULATION CHARACTERISTICS

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ESRI INDEXES

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HOUSING

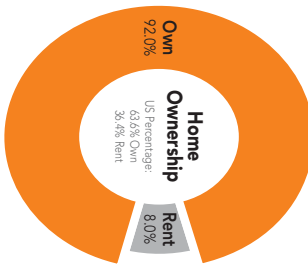
Median home value is displayed for markets that are primarily owner occupied; average rent is shown for renter-occupied markets. Tenure and home value are estimated by Esri. Housing type and average rent are from the Census Bureau's American Community Survey.



Typical Housing:
Single Family

Median Value:
\$387,000

US Median: \$177,000





LifeMode Group: Affluent Estates

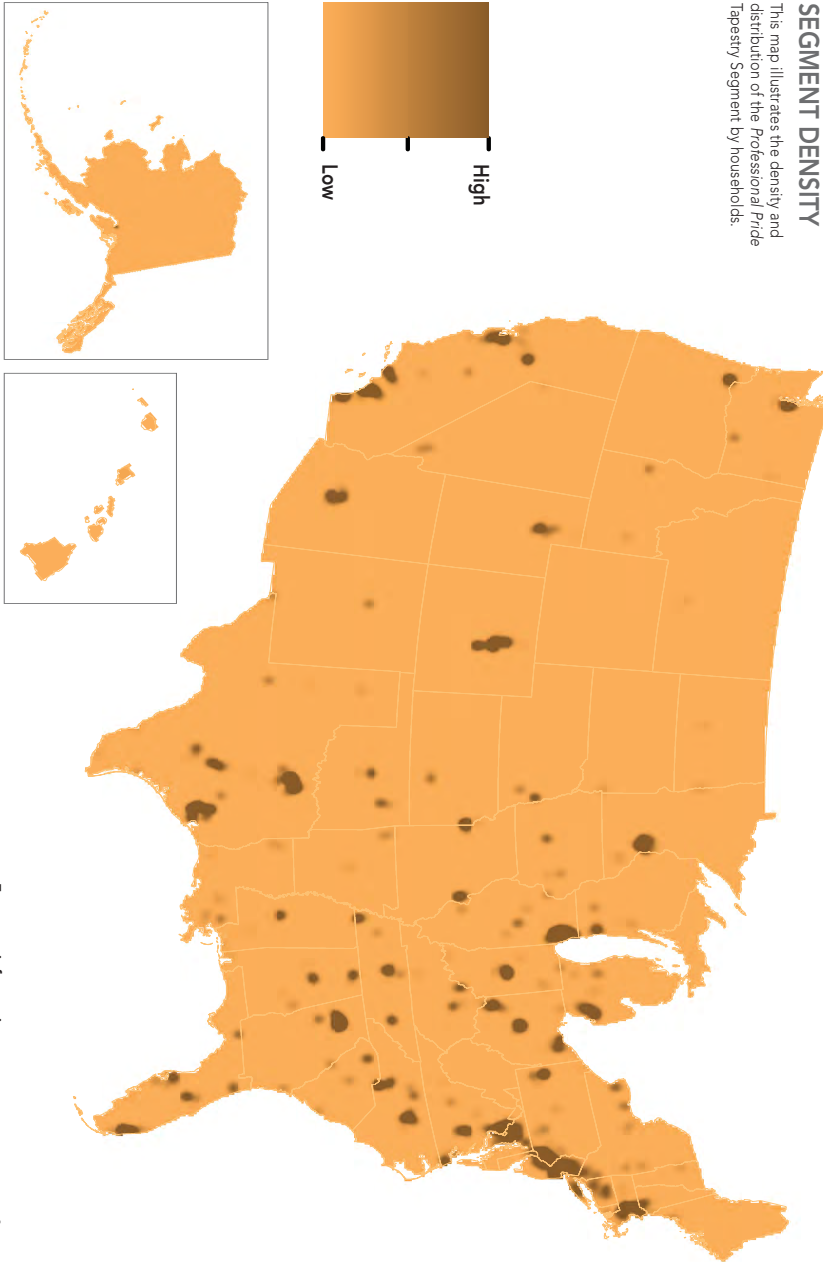
Professional Pride



TAPESTRY
SEGMENTATION
esri.com/tapestry

SEGMENT DENSITY

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



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636222
03/2015

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APPENDIX

F. Work plan budget



Byram Township, NJ

Work Plan Budget



Work Plan Tasks	Cost
Inventory/mix analysis	\$0
Physical conditions analysis	\$0
Public area maintenance*	\$0
Consumer preferences survey**	\$2,300
Market analysis	\$2,700
Chart area commercial rent/sf	\$0
Annual budget/strategic plan review	\$0
Business owner meetings	\$300
Property owner meetings	\$300
Broker/banker meetings	\$300
Organizational meetings	\$0
Monitor lease/sales/development activity	\$0
Retail-ready campaign*	\$0
Visual merchandising*	\$0
Create marketing materials	\$4,300
Create prospect list	\$750
Prospecting campaign	\$1,250
Create awareness*	\$0
Generate trial visits: events planning	\$0
Generate trial visits: events hosting	\$5,000
Retention campaign planning	\$0
Retention campaign hosting*	\$0
TOTAL:	\$17,200

* = Items that merit funding, but could be performed without it

** = Cost of tri-annual survey (\$6,900) has been annualized



APPENDIX

G. Work plan calendar

Byram Township, NJ

Work Plan Calendar



Calendar of Work Plan Tasks	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC
Inventory/mix analysis												
Physical conditions analysis	>	>	>	>	>	>	>	>	>	>	>	>
Public area maintenance												
Consumer preferences survey (every 3 years)										(>)		
Market analysis												
Chart area commercial rent/sf			>			>			>			>
Annual budget/strategic plan review	>											
Business owner meetings			>			>			>			>
Property owner meetings							>					
Broker/banker meetings			>						>			
Organizational meetings		>		>	>		>	>		>	>	
Monitor lease/sales/development activity		>		>	>	>	>	>		>	>	
Retail-ready campaign							>					
Visual merchandising			>		>				>		>	
Create marketing materials	>											
Create prospect list		>	>									
Prospecting campaign			>	>				>	>			
Create awareness					>					>		>
Generate trial visits: events planning		>								>		
Generate trial visits: events hosting				>		>	>				>	
Retention campaign planning												
Retention campaign hosting												