



TheRetailCoach®

PRIMARY RETAIL TRADE AREA PSYCHOGRAPHIC PROFILE

Cayce, South Carolina

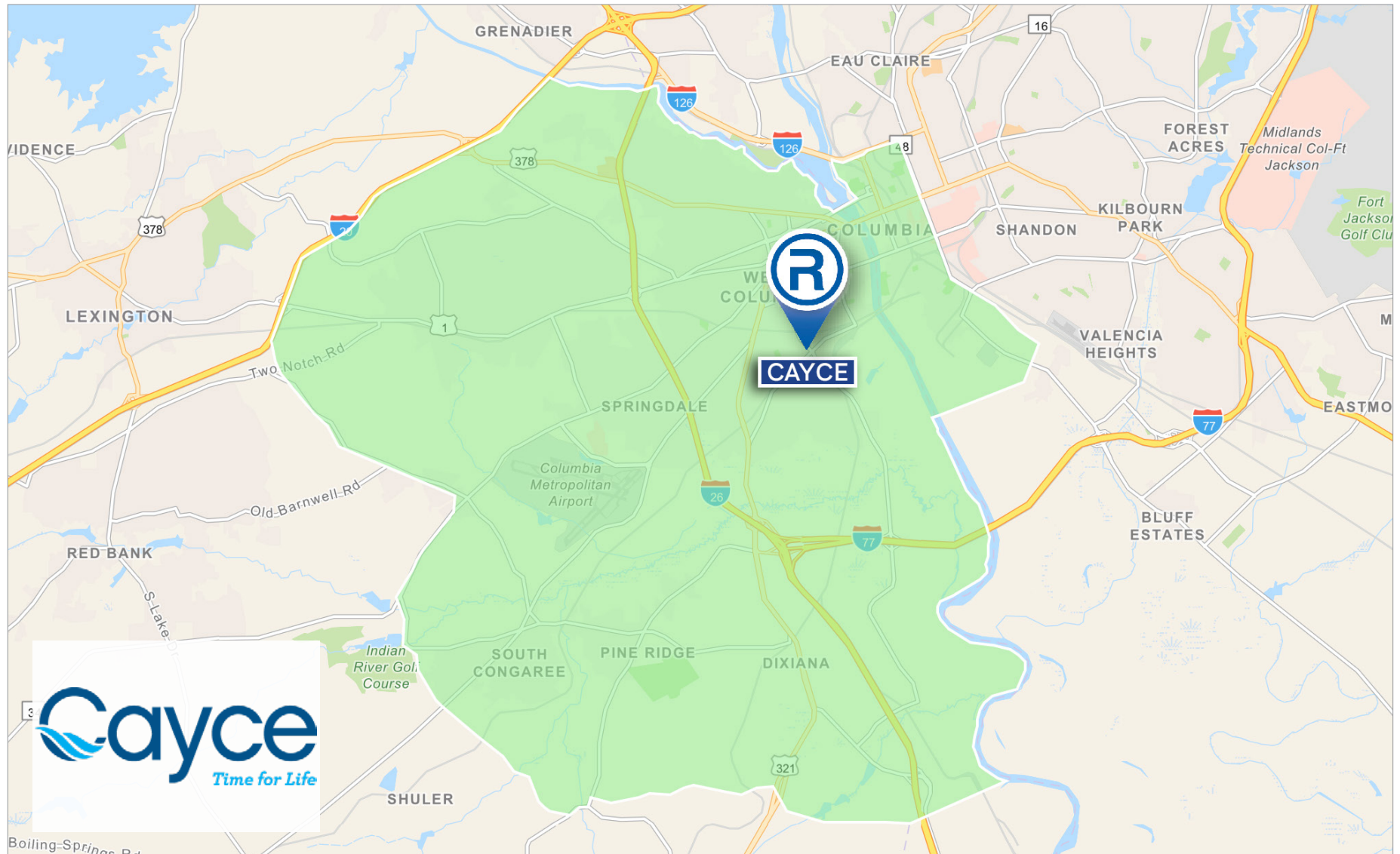
Prepared for
City of Cayce
November 2017





PRIMARY RETAIL TRADE AREA

Cayce, South Carolina



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TheRetailCoach®

TAPESTRY SEGMENTATION PROFILE

+ WHAT IS TAPESTRY SEGMENTATION?

Tapestry Segmentation is a market segmentation system that classifies US neighborhoods based on their socioeconomic and demographic compositions. Tapestry is a system for classifying consumers and constituents using all the variables that can distinguish consumer behavior, from household characteristics such as income and family type to personal traits like age, education, or employment and even housing choices.

Tapestry Segmentation classifies US neighborhoods into 67 distinct market segments. Neighborhoods with the most similar characteristics are grouped together, while neighborhoods with divergent characteristics are separated. Tapestry Segmentation combines the “who” of lifestyle demography with the “where” of local neighborhood geography to create a model of various lifestyle classifications, or segments, of actual neighborhoods with addresses—distinct behavioral market segments.

+ WHO SHOULD USE TAPESTRY SEGMENTATION?

All companies, agencies, and organizations need to understand consumers/constituents in order to supply them with the right products and services and to reach them via their preferred media. These applications require a robust segmentation system that can accurately profile these diverse markets. The versatility and predictive power of Tapestry Segmentation allow users to integrate their own data or national consumer surveys into Tapestry Segmentation to identify their best market segments and reach them through the most effective channels.

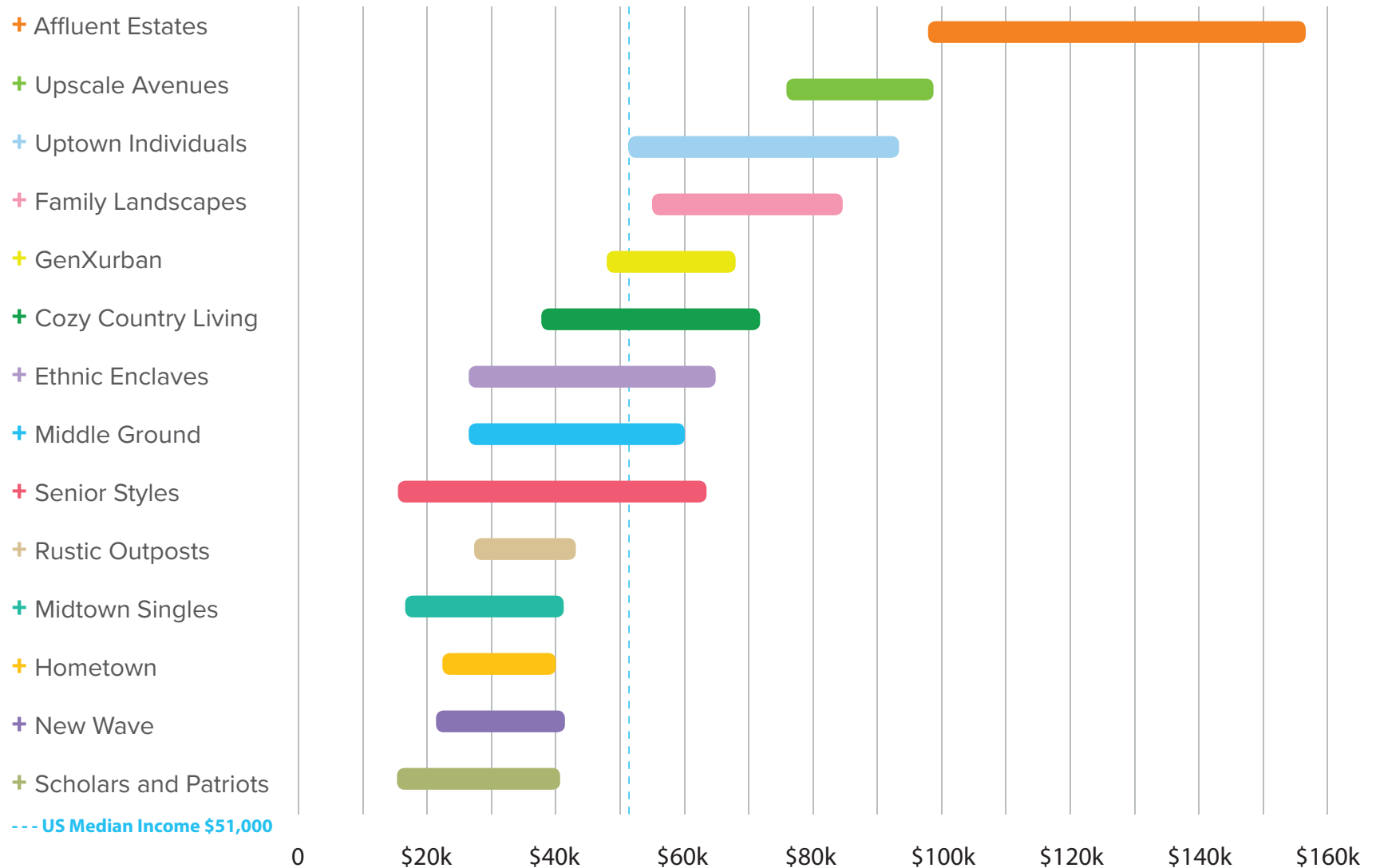
+ TAPESTRY SEGMENTATION SUMMARY GROUPS

Esri's Tapestry Segmentation provides a robust, powerful portrait of the 67 US consumer markets. To provide a broader view of these 67 segments, Esri combined them into 14 LifeMode Summary Groups based on lifestyle and lifestage composition.

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



INCOME RANGE OF LIFEMODE SUMMARY GROUPS





PRIMARY RETAIL TRADE AREA • LIFEMODE SUMMARY GROUPS MAP

Cayce, South Carolina

+ L1 AFFLUENT ESTATES

Established wealth — educated, well-traveled married couples

+ L2 UPSCALE AVENUES

Prosperous, married couples in higher density neighborhoods

+ L3 UPTOWN INDIVIDUALS

Younger, urban singles on the move

+ L4 FAMILY LANDSCAPES

Successful younger families in newer housing

+ L5 GENXURBAN

Gen X in middle age; families with fewer kids and a mortgage

+ L6 COZY COUNTRY

Empty nesters in bucolic settings

+ L7 ETHNIC ENCLAVES

Established diversity — young, Hispanic homeowners with families

+ L8 MIDDLE GROUND

Lifestyles of thirtysomethings

+ L9 SENIOR STYLES

Senior lifestyles reveal the effects of saving for retirement

+ L10 RUSTIC OUTPOSTS

Country life with older families, older homes

+ L11 MIDTOWN SINGLES

Millennials on the move; single, diverse, and urban

+ L12 HOMETOWN

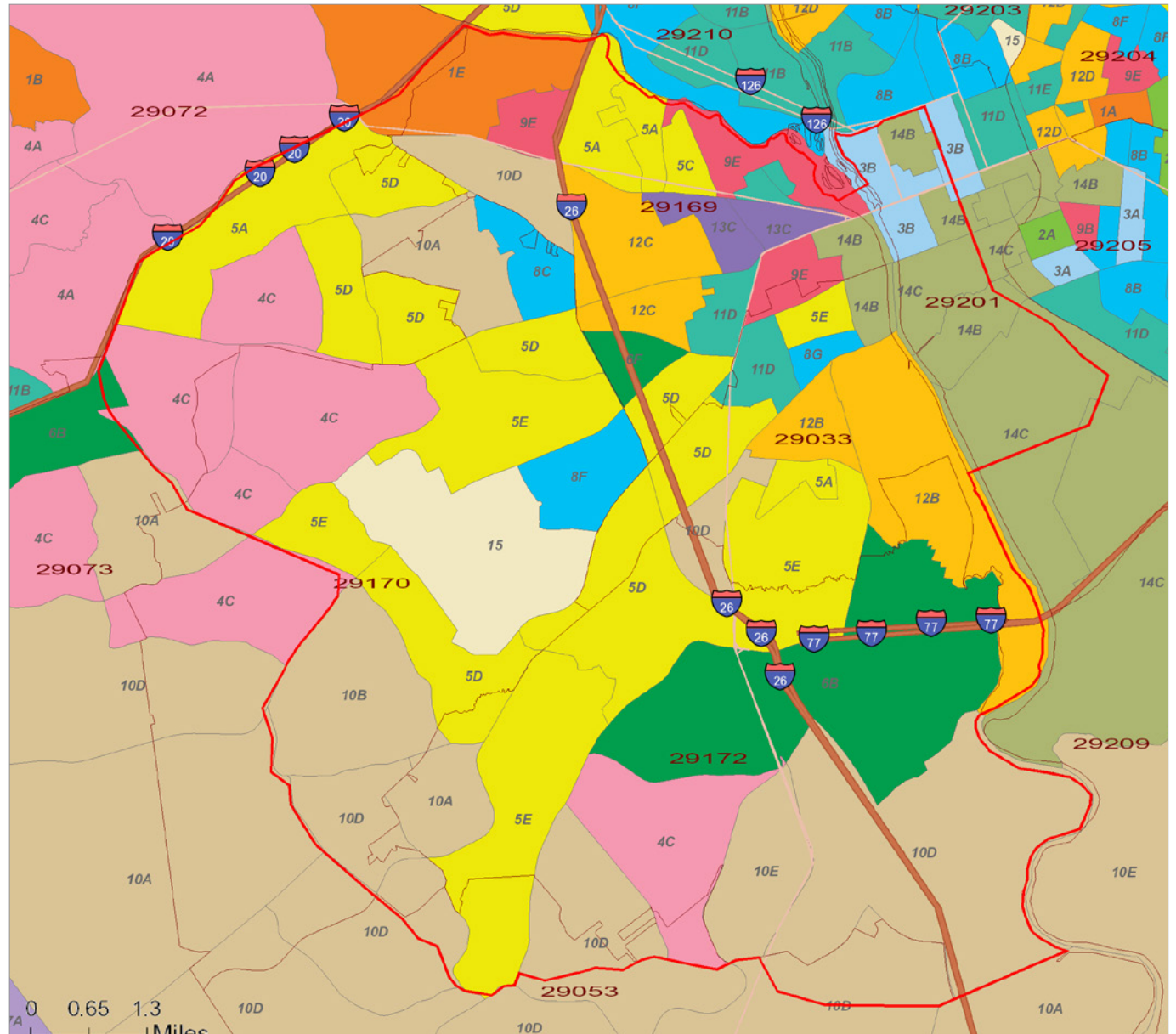
Growing up and staying close to home; single householders

+ L13 NEXT WAVE

Urban denizens; young, diverse, hardworking families

+ L14 SCHOLARS AND PATRIOTS

College campuses and military neighborhoods





PRIMARY RETAIL TRADE AREA • TOP TAPESTRY SEGMENTS

Cayce, South Carolina

	TAPESTRY SEGMENTATION	HOUSEHOLDS PERCENT	CUMULATIVE PERCENT	US HOUSEHOLDS PERCENT	CUMULATIVE PERCENT	INDEX
1	Middleburg (4C)	14.3%	14.3%	2.9%	2.9%	501
2	Rustbelt Traditions (5D)	11.9%	26.2%	2.2%	5.1%	538
3	Down the Road (10D)	9.8%	36.0%	1.1%	6.2%	861
4	Midlife Constants (5E)	7.9%	43.9%	2.5%	8.7%	316
5	College Towns (14B)	6.7%	50.6%	1.0%	9.7%	701
	Subtotal	50.6%		9.7%		
6	Dorms to Diplomas (14C)	5.8%	56.4%	0.5%	10.2%	1,124
7	Retirement Communities (9E)	5.5%	61.9%	1.2%	11.4%	450
8	Comfortable Empty Nesters (5A)	5.4%	67.3%	2.5%	13.9%	219
9	Small Town Simplicity (12C)	4.6%	71.9%	1.9%	15.8%	248
10	Southern Satellites (10A)	4.4%	76.3%	3.1%	18.9%	142
	Subtotal	25.7%		9.2%		
11	Set to Impress (11D)	3.4%	79.7%	1.4%	20.3%	242
12	Traditional Living (12B)	3.2%	82.9%	1.9%	22.2%	163
13	NeWest Residents (13C)	2.5%	85.4%	0.8%	23.0%	322
14	Young and Restless (11B)	2.3%	87.7%	1.7%	24.7%	130
15	Exurbanites (1E)	1.8%	89.5%	1.9%	26.6%	92
	Subtotal	13.2%		7.7%		
16	Bright Young Professionals (8C)	1.8%	91.3%	2.2%	28.8%	80
17	Old and Newcomers (8F)	1.5%	92.8%	2.3%	31.1%	66
18	Parks and Rec (5C)	1.4%	94.2%	2.0%	33.1%	69
19	Metro Renters (3B)	1.2%	95.4%	1.6%	34.7%	80
20	Salt of the Earth (6B)	1.2%	96.6%	2.9%	37.6%	42
	Subtotal	7.1%		11.0%		
	Total	96.5%		37.6%		257



LifeMode Group • Family Landscapes

4C MIDDLEBURG

Middleburg neighborhoods transformed from the easy pace of country living to semirural subdivisions in the last decade, when the housing boom reached out.

Residents are conservative, family-oriented consumers. Still more country than rock and roll, they are thrifty but willing to carry some debt and are already investing in their futures. They rely on their smartphones and mobile devices to stay in touch and pride themselves on their expertise. They prefer to buy American and travel in the US. This market is younger but growing in size and assets.

US Household // 3,319,000
Average Household Size // 2.73
Median Age // 35.3
Median Household Income // \$55,000

+ OUR NEIGHBORHOOD

- Semirural locales within metropolitan areas.
- Neighborhoods changed rapidly in the previous decade with the addition of new single-family homes.
- Include a number of mobile homes (Index 152).
- Affordable housing, median value of \$158,000 (Index 89) with a low vacancy rate.
- Young couples, many with children; average household size is 2.73.



4C

+ MARKET PROFILE

(Consumer preferences are estimated from data by GfK MRI)

- Residents are partial to trucks, SUVs, and occasionally, convertibles, or motorcycles.
- Entertainment is primarily family-oriented, TV and movie rentals or theme parks and family restaurants.
- Spending priorities also focus on family (children's toys and apparel) or home DIY projects.
- Sports include hunting, target shooting, bowling, and baseball.
- TV and magazines provide entertainment and information.
- Media preferences include country and Christian channels.

+ SOCIOECONOMIC TRAITS

- Education: 66% with a high school diploma or some college.
- Unemployment rate lower at 7.4% (Index 85).
- Labor force participation typical of a younger population at 66.7% (Index 106).
- Traditional values are the norm here—faith, country, and family.
- Prefer to buy American and for a good price.
- Comfortable with the latest in technology, for convenience (online banking or saving money on landlines) and entertainment.

+ HOUSING

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Typical Housing:

Single Family

Median Value:

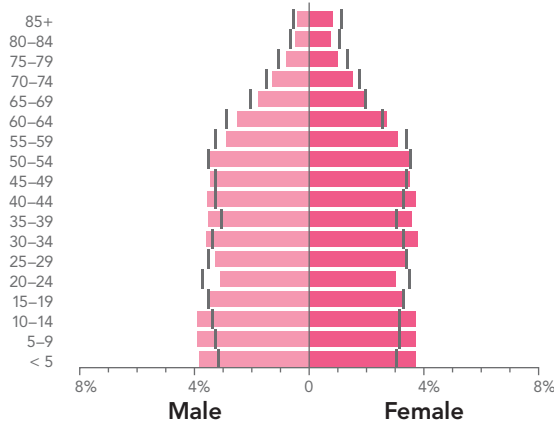
\$158,000

US Median: \$177,000

AGE BY SEX (Esri data)

Median Age: 35.3 US: 37.6

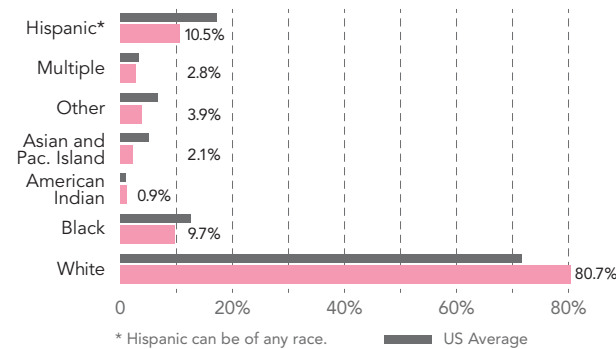
I Indicates US



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).

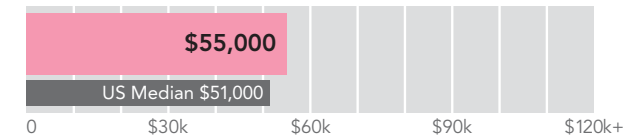
Diversity Index: 46.3 US: 62.1



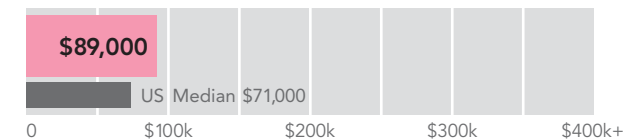
INCOME AND NET WORTH

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

Median Household Income

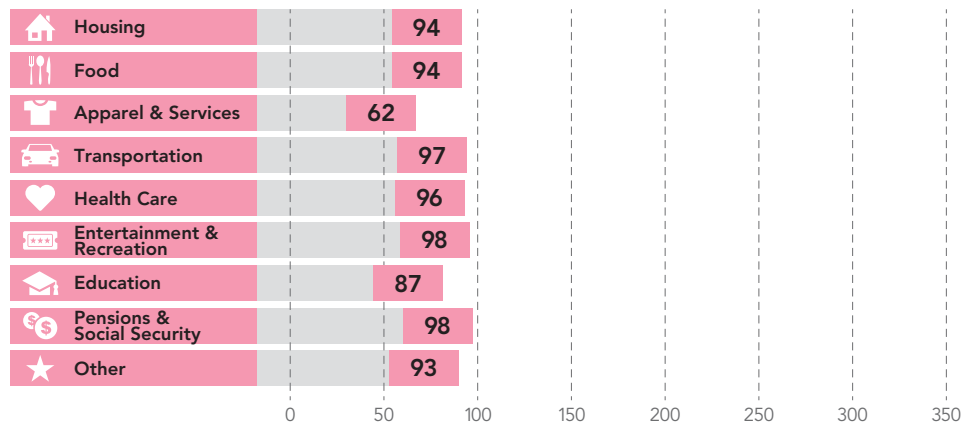


Median Net Worth



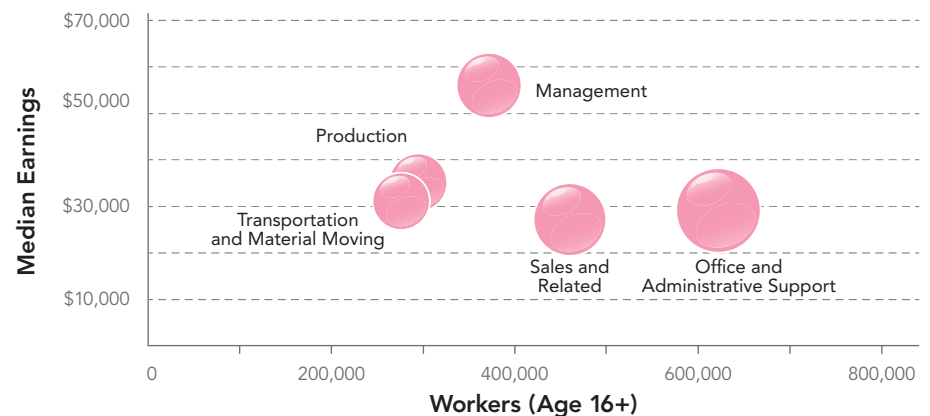
AVERAGE HOUSEHOLD BUDGET INDEX

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



OCCUPATION BY EARNINGS

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





LifeMode Group • GenXurban



RUSTBELT TRADITIONS

The backbone of older industrial cities in states surrounding the Great Lakes, Rustbelt Traditions residents are a mix of married-couple families and singles living in older developments of single-family homes.

While varied, the work force is primarily white collar, with a higher concentration of skilled workers in manufacturing, retail trade, and health care. Rustbelt Traditions represents a large market of stable, hard-working consumers with modest incomes but above average net worth (Index 111). Family oriented, they value time spent at home. Most have lived, worked, and played in the same area for years.

US Household // 2,685,000

Average Household Size // 2.46

Median Age // 38.4

Median Household Income // \$49,000

+ OUR NEIGHBORHOOD

- Almost half (46%) of the households are married-couple families, similar to the US (48%), most without children (also similar to the US); the slightly higher proportion of singles (Index 105) reflects the aging of the population.
- Average household size is slightly lower at 2.46.
- They are movers, slightly more mobile than the US population (Index 109), but almost half of householders (46%) moved into their current homes before 2000.
- Most residents live in modest, single-family homes in older neighborhoods built in the 1950s (Index 218).
- Nearly three quarters own their homes; over half of households have mortgages.
- A large and growing market, Rustbelt Traditions residents are located in the dense urban fringe of metropolitan areas throughout the Midwest and South.
- Most households have two or more vehicles available.



5D

+ MARKET PROFILE

(Consumer preferences are estimated from data by GfK MRI)

- Residents take advantage of convenience stores for fueling up and picking up incidentals.
- Watching television is a common pastime; many households have more than four TVs.
- Favorite programming ranges from ESPN, Animal Planet, and AMC to children's shows on Nickelodeon and Cartoon Network.
- Residents are connected; entertainment activities like online gaming dominate their Internet usage.
- Favorite family restaurants include Applebee's, Outback Steakhouse, and Texas Roadhouse.
- Radio dials are typically tuned to classic rock stations.

+ SOCIOECONOMIC TRAITS

- Most have graduated from high school or spent some time at a college or university.
- Unemployment below the US at 8%; labor force participation slightly higher than the US at 67%.
- While most income derived from wages and salaries, nearly 30% of households collecting Social Security and nearly 20% drawing income from retirement accounts.
- Family-oriented consumers who value time spent at home.
- Most lived, worked, and played in the same area for years.
- Budget aware shoppers that favor American-made products.
- Read newspapers, especially the Sunday editions.

+ 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:

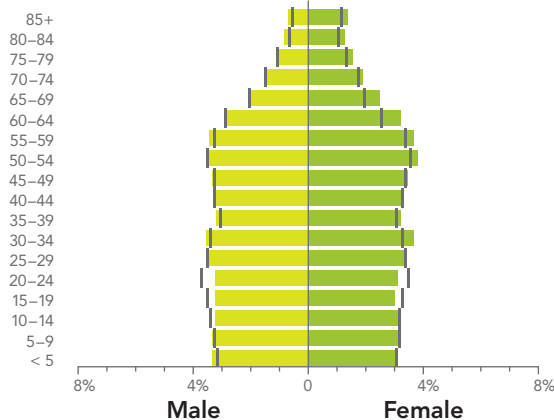
\$118,000

US Median \$177,000

AGE BY SEX (Esri data)

Median Age: 38.4 US: 37.6

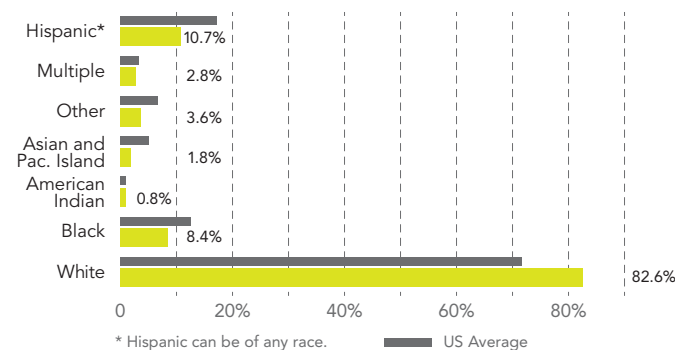
I Indicates US



RACE AND ETHNICITY (Esri data)

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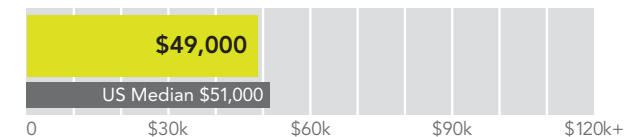
Diversity Index: 44.2 US: 62.1



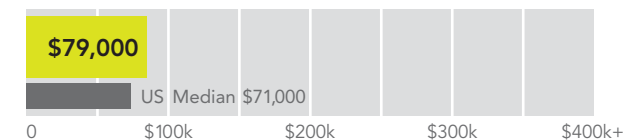
INCOME AND NET WORTH

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Median Household Income

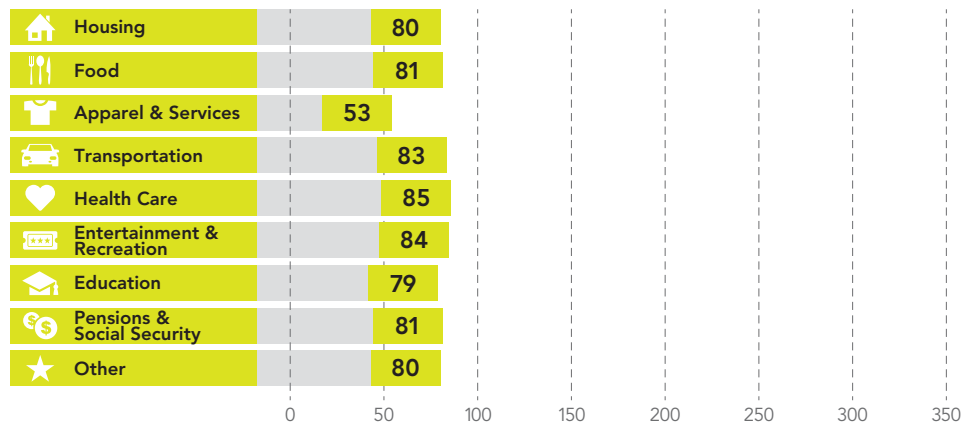


Median Net Worth



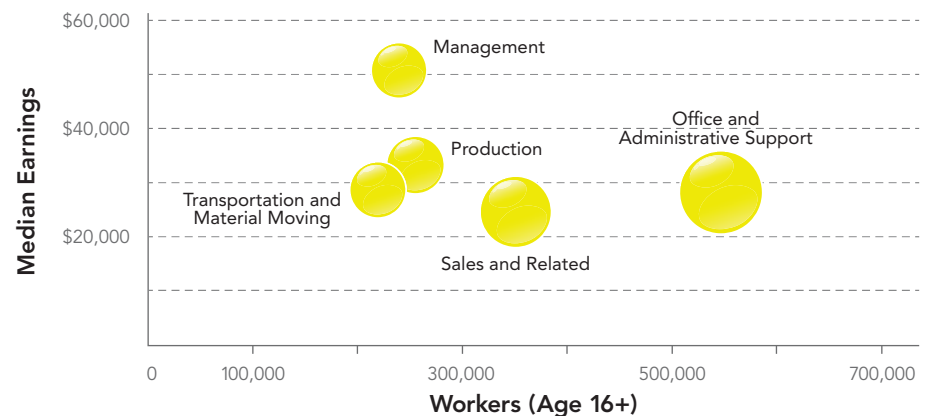
AVERAGE HOUSEHOLD BUDGET INDEX

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



OCCUPATION BY EARNINGS

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





LifeMode Group • Rustic Outposts

10D

DOWN THE ROAD

Down the Road is a mix of low-density, semirural neighborhoods in large metropolitan areas; half are located in the South, with the rest chiefly in the West and Midwest.

Almost half of householders live in mobile homes; approximately two-fifths live in single-family homes. These are younger, diverse communities, with the highest proportion of American Indians of any segment. These family-oriented consumers value their traditions. Workers are in service, retail trade, manufacturing, and construction industries, with higher proportions in agriculture and mining, compared to the US. This market has higher unemployment, much lower median household income and home value, and a fifth of households with income below poverty level.

US Household // 1,354,000

Average Household Size // 2.74

Median Age // 34.3

Median Household Income // \$36,000

+ OUR NEIGHBORHOOD

- Two-thirds of households are owned.
- Family market, primarily married couples or single-parent households (Index 145).
- Close to half of all households live in mobile homes (Index 808).
- Four-fifths of households were built in 1970 or later.
- About 18% of owned homes are valued under \$50,000 (over 3 times the US percentage).



10D

+ MARKET PROFILE

(Consumer preferences are estimated from data by GfK MRI)

- Purchased a used vehicle in the past year, likely maintaining the vehicle themselves.
- Routinely stop by the convenience store to purchase a lottery ticket.
- Participate in fishing and hunting.
- Visit chat rooms and play games online.
- Listen to the radio, especially at work, with a preference for rap, R&B, and hip-hop music.
- Enjoy programs on Animal Planet, typically watching via satellite dish.
- Often prepare quick meals, using packaged or frozen dinner entrees.
- Favorite fast food: pizza.
- Frequent Walmart for all their shopping needs (groceries, clothing, pharmacy, etc.).

+ SOCIOECONOMIC TRAITS

- Education completed: 37% with a high school diploma only, 38% with some college education or a degree.
- Unemployment rate is 11.6%, higher than the US rate.
- Labor force participation rate is 59.6%, slightly lower than the US.
- Family-oriented, outgoing consumers; they place importance on preserving time-honored customs.
- They put a premium on convenience rather than health and nutrition.

+ 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:

Mobile Homes:
Single Family

Median Value:

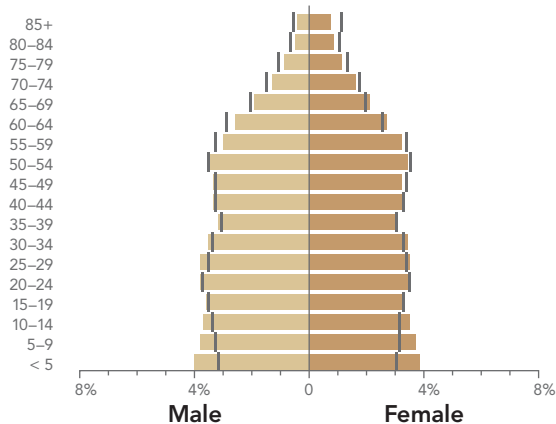
\$104,000

US Median: \$177,000

AGE BY SEX (Esri data)

Median Age: 34.3 US: 37.6

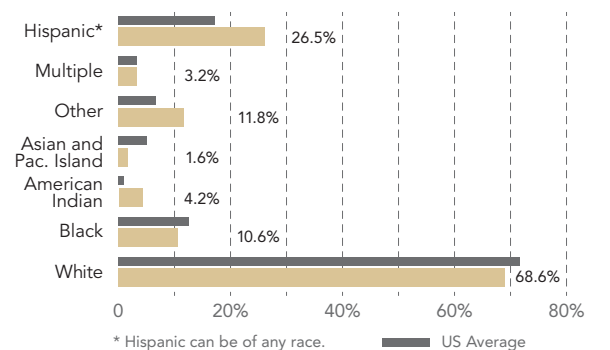
I Indicates US



RACE AND ETHNICITY (Esri data)

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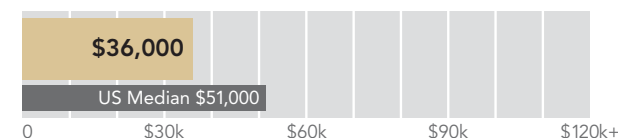
Diversity Index: 70.5 US: 62.1



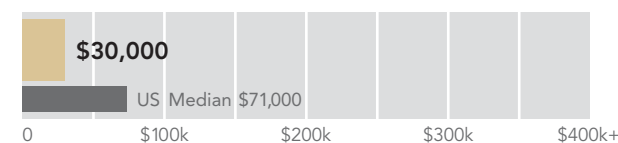
INCOME AND NET WORTH

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Median Household Income

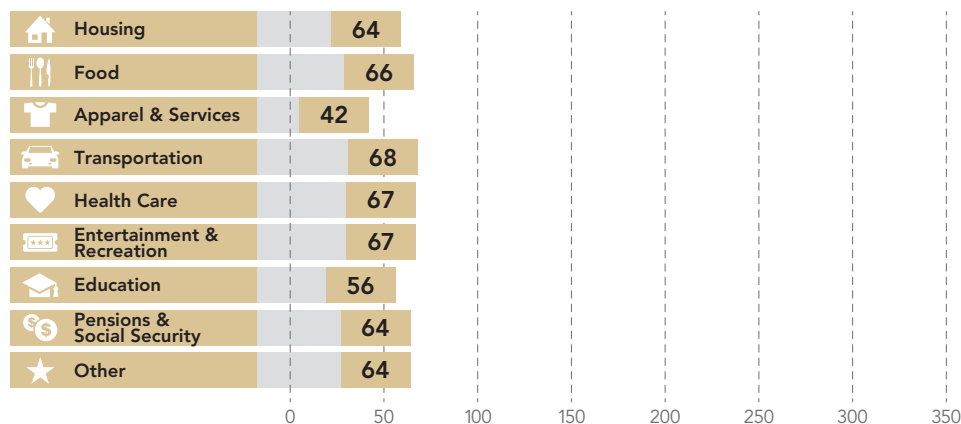


Median Net Worth



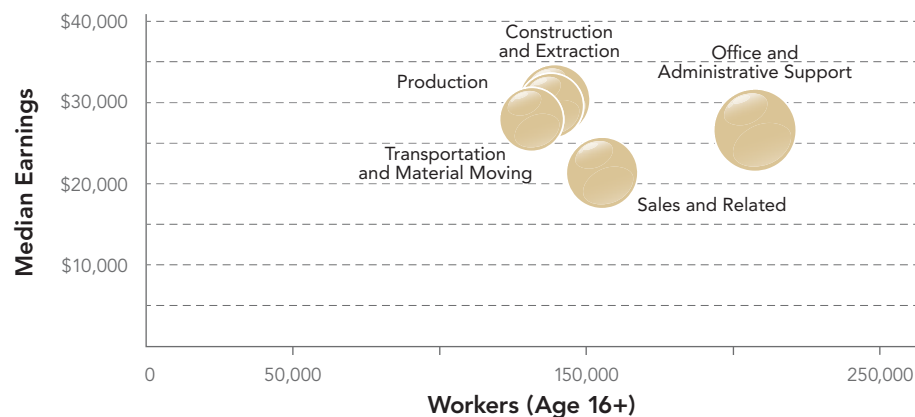
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OCCUPATION BY EARNINGS

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





LifeMode Group • GenXurban

5E MIDLIFE CONSTANTS

Midlife Constants residents are seniors, at or approaching retirement, with below average labor force participation and above average net worth.

Although located in predominantly metropolitan areas, they live outside the central cities, in smaller communities. Their lifestyle is more country than urban. They are generous, but not spendthrifts.

US Household // 3,043,000
Average Household Size // 2.30
Median Age // 45.9
Median Household Income // \$48,000

+ OUR NEIGHBORHOOD

- Older homes (most built before 1980) found in the suburban periphery of smaller metropolitan markets.
- Primarily married couples, with a growing share of singles.
- Settled neighborhoods with slow rates of change and residents that have lived in the same house for years.
- Single-family homes, less than half still mortgaged, with a median home value of \$141,000 (Index 80).



5E

+ MARKET PROFILE

(Consumer preferences are estimated from data by GfK MRI)

- Prefer practical vehicles like SUVs and trucks (domestic, of course).
- Sociable, church-going residents belonging to fraternal orders, veterans' clubs and charitable organizations and do volunteer work and fund-raising.
- Contribute to arts/cultural, educational, political, and social services organizations.
- DIY homebodies that spend on home improvement and gardening.
- Media preferences: country or Christian channels.
- Leisure activities include scrapbooking, movies at home, reading, fishing, and golf.

+ SOCIOECONOMIC TRAITS

- Education: 64% have a high school diploma or some college.
- Unemployment is lower in this market at 7.4% (Index 86), but so is the labor force participation rate (Index 89).
- Almost 42% of households are receiving Social Security (Index 150); 28% also receive retirement income (Index 160).
- Traditional, not trendy; opt for convenience and comfort, not cutting-edge. Technology has its uses, but the bells and whistles are a bother.
- Attentive to price, but not at the expense of quality, they prefer to buy American and natural products.
- Radio and newspapers are the media of choice (after television).

+ HOUSING

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Typical Housing:

Single Family

Median Value:

\$141,000

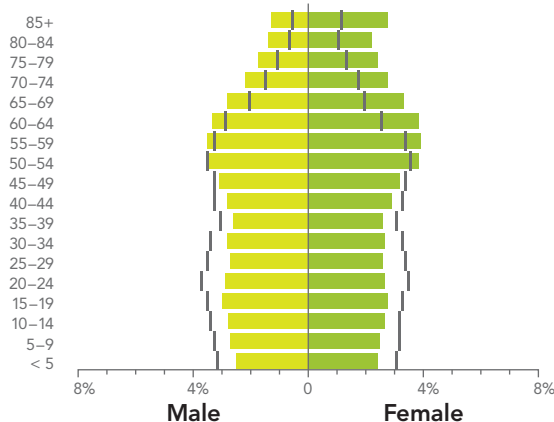
US Median \$177,000

AGE BY SEX

(Esri data)

Median Age: **45.9** US: 37.6

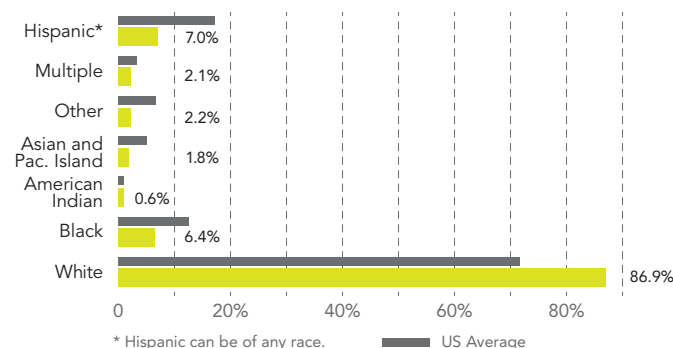
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RACE AND ETHNICITY

(Esri data)

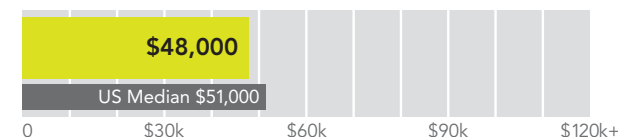
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Diversity Index: **34.0** US: 62.1

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Median Household Income

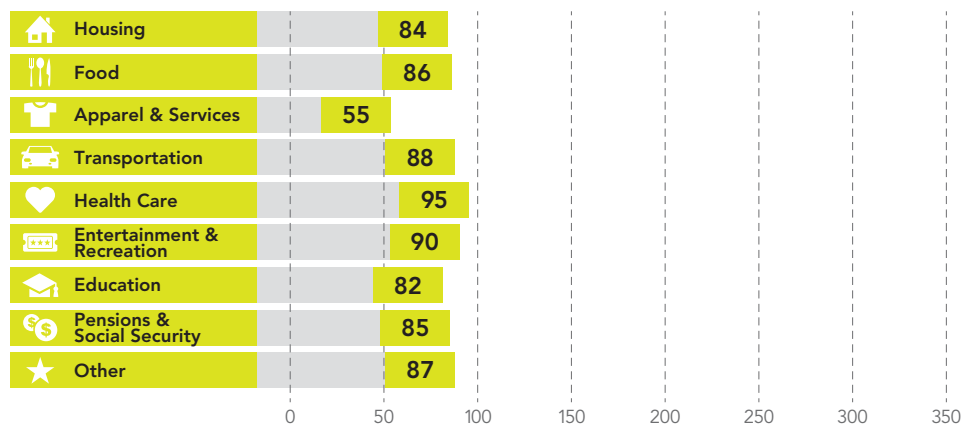


Median Net Worth



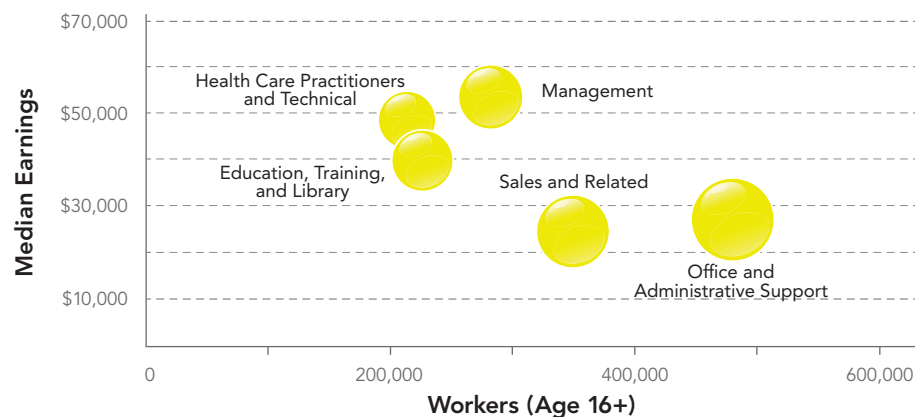
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OCCUPATION BY EARNINGS

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LifeMode Group • Scholars and Patriots

14B

COLLEGE TOWNS

About half the residents of College Towns are enrolled in college, while the rest work for a college or the services that support it.

Students have busy schedules, but make time between studying and part-time jobs for socializing and sports. Students that are new to managing their own finances tend to make impulse buys and splurge on the latest fashions. This digitally engaged group uses computers and cell phones for all aspects of life including shopping, school work, news, social media, and entertainment. College Towns are all about new experiences, and residents seek out variety and adventure in their lives.

US Household // 1,104,000
Average Household Size // 2.12
Median Age // 24.3
Median Household Income // \$28,000

+ OUR NEIGHBORHOOD

- These are non-family households with many students living alone or with roommates for the first time.
- This segment is a mix of densely developed student housing and dorms with local residences.
- Off-campus, low rent apartments comprise half of the housing stock.
- Over three-quarters of the households are renter occupied, with one in ten remaining vacant.
- One-third of homes are single family; mostly occupied by local residents who own their homes.
- This market is bike and pedestrian friendly.



+ MARKET PROFILE

(Consumer preferences are estimated from data by GfK MRI)

- Own a laptop and a portable MP3 player.
- Watch movies and TV programs online; MTV and Comedy Central on TV.
- Use the Internet for social media connections, blogging, paying bills, and downloading music.
- Have cell phones only (no landlines) and enjoy customizing them.
- Popular activities: backpacking, Pilates, and Frisbee.
- Go out to the movies and out for drinks.

+ SOCIOECONOMIC TRAITS

- Their limited incomes result in thrifty purchases.
- They do not eat the healthiest foods, nor do they see a doctor regularly.
- They dress to impress with the latest fashions of the season.
- They prefer environmentally friendly products and vehicles that get good gas mileage.
- They're heavily influenced by celebrity endorsements and trends in magazines.
- They feel anything that can be done online is easier than in person.
- They have liberal political views.

+ 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:

Multiunit Rentals;
Single Family

Average Rent:

\$890
US Average: \$990

AGE BY SEX (Esri data)

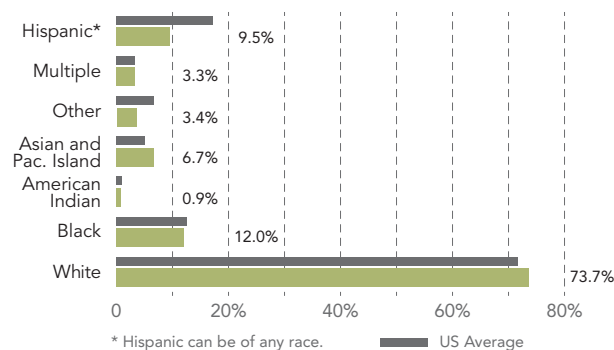
Median Age: **24.3** US: 37.6

I Indicates US



RACE AND ETHNICITY (Esri data)

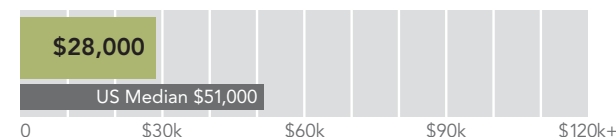
The Diversity Index summarizes racial and ethnic diversity. The index shows the likelihood that two persons, chosen at random from the same area, belong to different race or ethnic groups. The index ranges from 0 (no diversity) to 100 (complete diversity).

Diversity Index: **53.5** US: 62.1

INCOME AND NET WORTH

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

Median Household Income

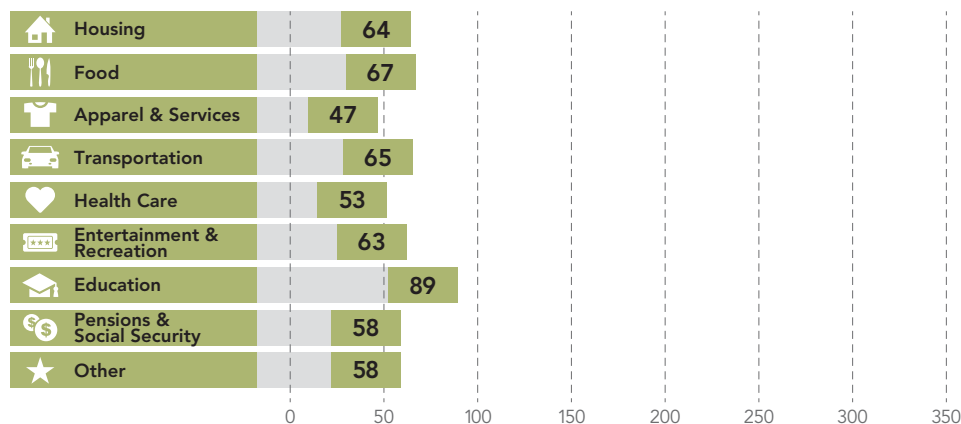


Median Net Worth



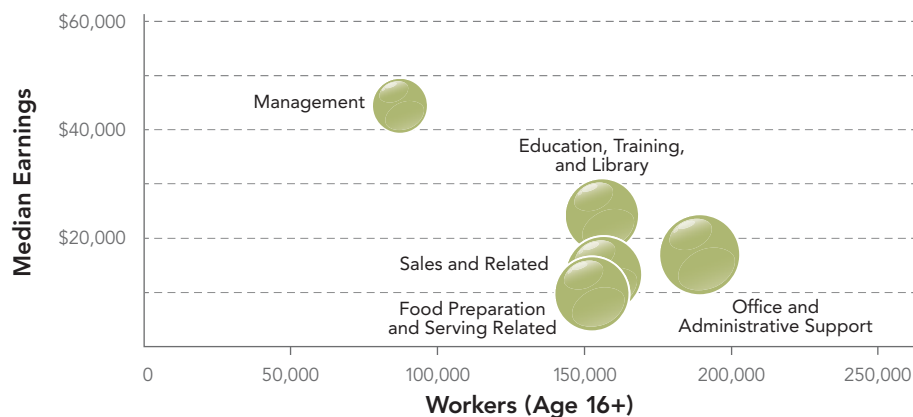
AVERAGE HOUSEHOLD BUDGET INDEX

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



OCCUPATION BY EARNINGS

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





ABOUT THE RETAIL COACH

The Retail Coach, LLC, is a national retail analytics and locational intelligence firm that specializes in all aspects of retail market analyses and recruitment, from “macro to micro” trade area assessment to actively recruiting retailers on behalf of our clients.

Through its unique Retail360® process, The Retail Coach offers a dynamic system of products and services that better enable communities to maximize their retail development potential.



C. Kelly Cofer
President & CEO
The Retail Coach, LLC

Retail360®

Providing more than simple data reports of psychographic and demographic trends, The Retail Coach goes well beyond other retail consulting and market research firms’ offerings by combining current national and statewide demographics and trend data with real-world, “on-the-ground” data gathered through extensive visits within our clients’ communities.

Every community is different, and there is no “one size fits all” retail recruitment solution. Compiling the gathered data into client-tailored information packets that are uniquely designed for, and targeted to, specific retailers and restaurants who meet the community’s needs helps assure our clients that they are receiving the latest and best information for their retail recruitment efforts—all with personal service and coaching guidance that continues beyond the initial project scope and timeline.

Our Retail360® process assures that communities get timely, accurate and relevant information. Translating that data into the information that retailers need and seek assures our clients even better possibilities for tremendous retail growth and success.

The Retail Coach –

“It’s not about data. It’s about your success.”



ACKNOWLEDGEMENTS

The observations, conclusions and recommendations contained in this study are solely those of The Retail Coach, LLC and should not be construed to represent the opinions of others, including its clients, or any other entity prior to such entity's express approval of this study.

All information furnished is from sources deemed reliable and is submitted subject to errors, omissions, change of terms and/or conditions.

Sources used in completing this study include: infoUSA™, Applied Geographic Solutions, Nielsen 2017, ESRI 2017, U.S. Census Bureau, Economy.com, Spatial Insights Inc., Urban Land Institute, CensusViewer.com, International Council of Shopping Centers, and/or U.S. Bureau of Labor and Statistics.

To better represent current data, where applicable, portions of estimated actual sales may be calculated using an average sales per square foot model.

Mapping data is provided by MapInfo, Nielsen, ESRI and/or Microsoft Corporation.

All information furnished is from sources deemed reliable and is submitted subject to errors, omissions, change of terms and/or conditions.