



PRIMARY RETAIL TRADE AREA PSYCHOGRAPHIC PROFILE

Leon Valley, Texas

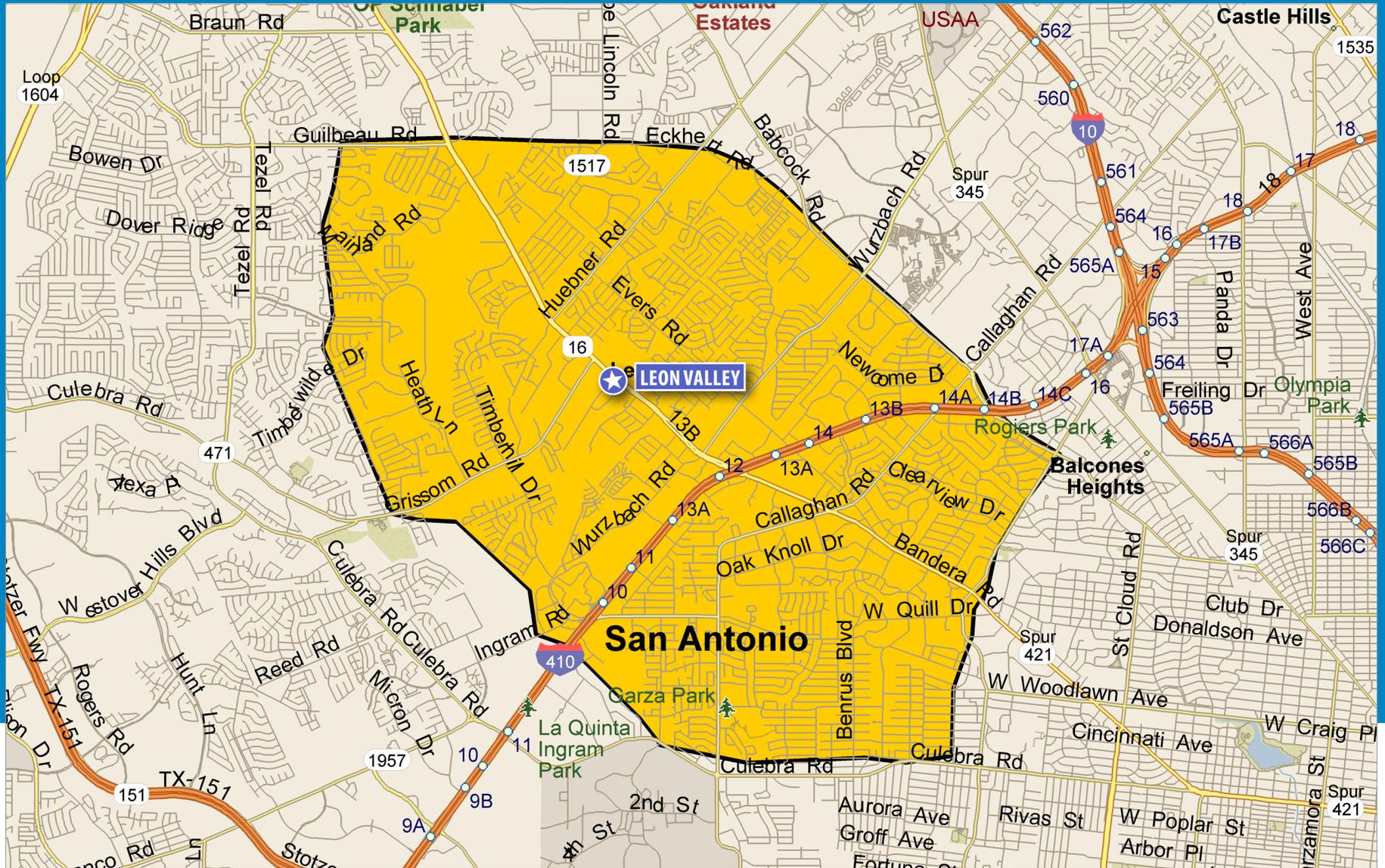


Prepared for
City of Leon Valley
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Primary Retail Trade Area

Leon Valley, Texas



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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.

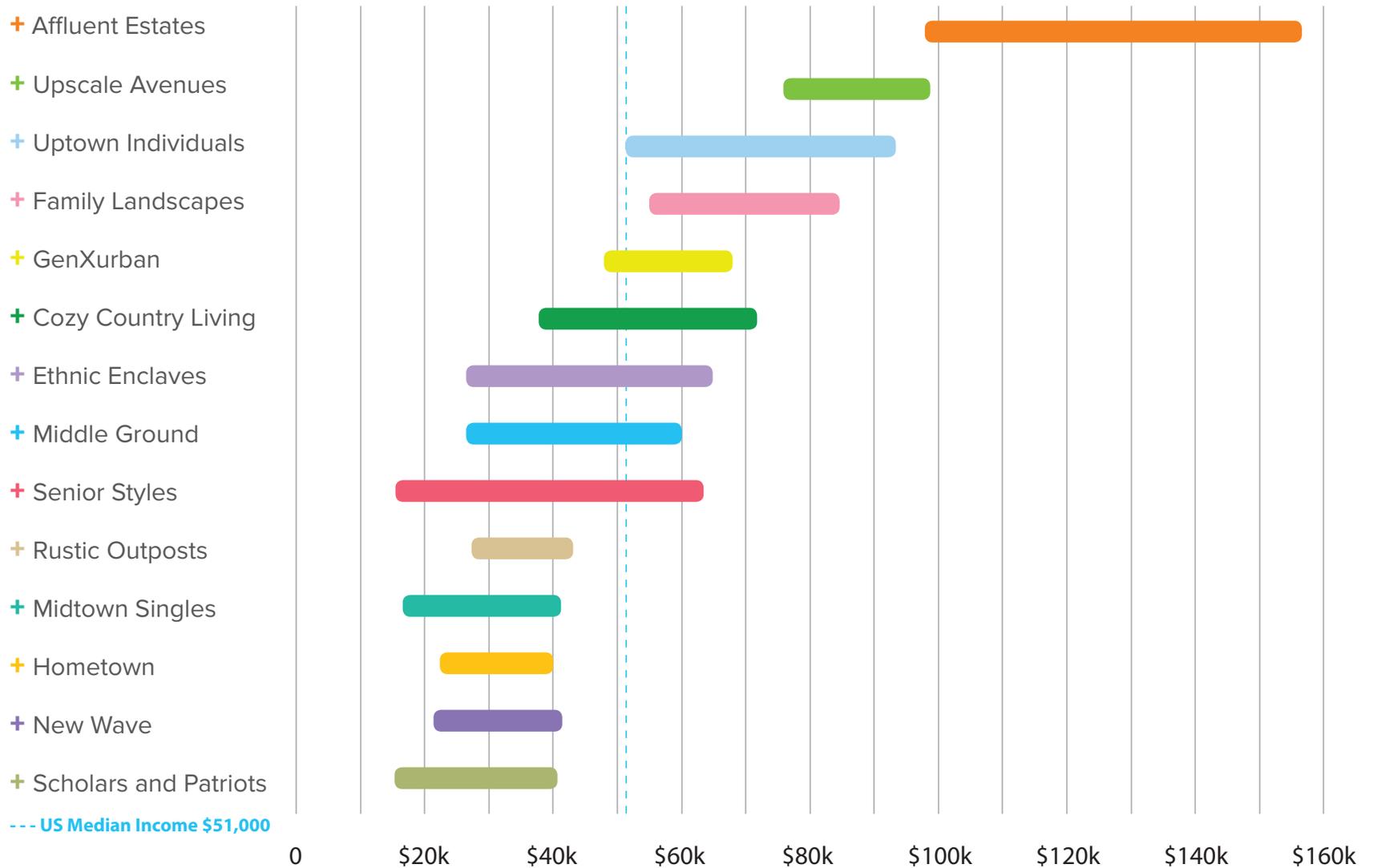
+ TAPESTRY SEGMENTATION SUMMARY GROUPS

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

Leon Valley, Texas

+ 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

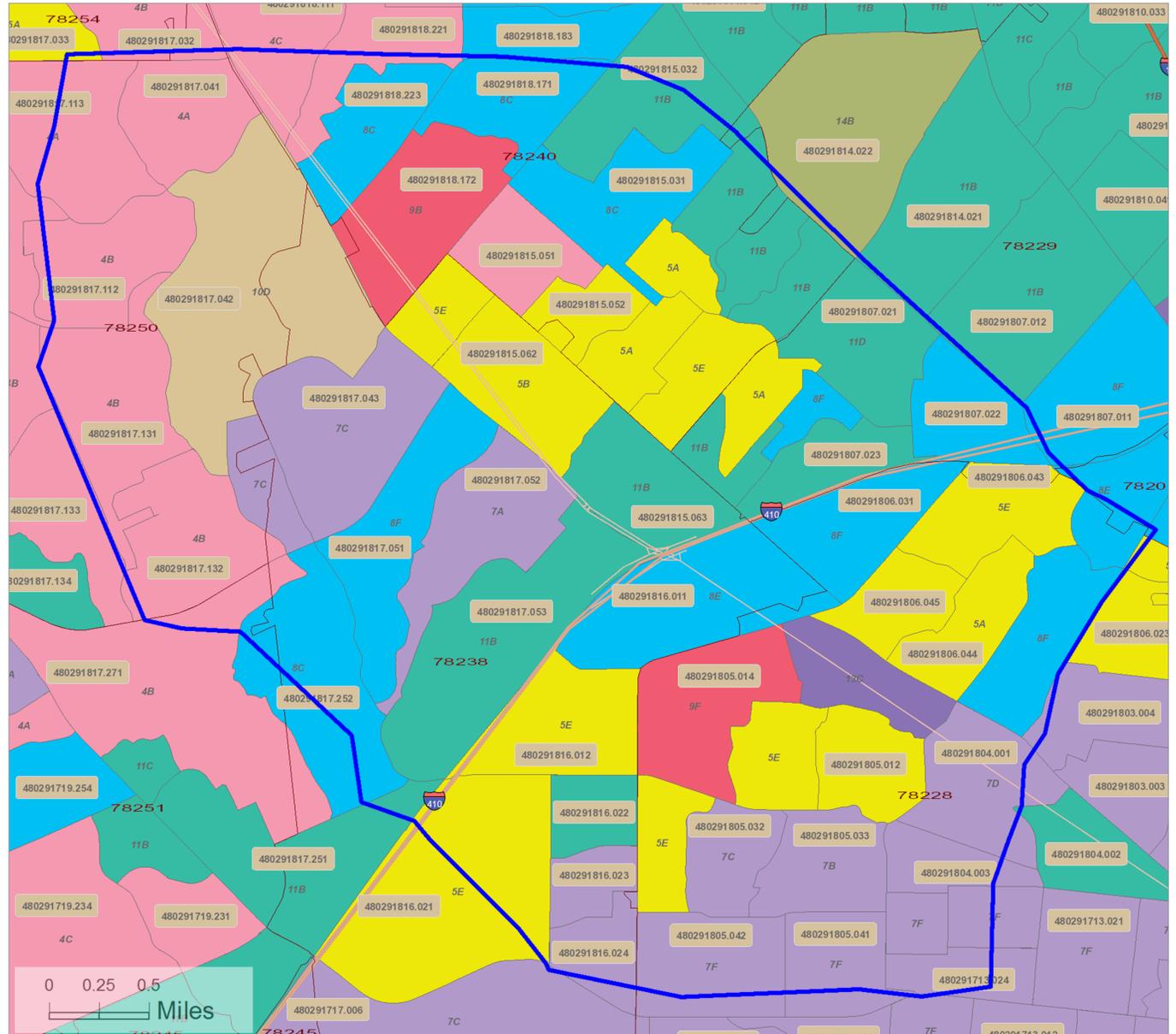
Growing up and staying close to home; single householders

+ 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

Leon Valley, Texas

	TAPESTRY SEGMENTATION	HOUSEHOLDS PERCENT	CUMULATIVE PERCENT	US HOUSEHOLDS PERCENT	CUMULATIVE PERCENT	INDEX
1	Young and Restless (11B)	20.3%	20.3%	1.7%	1.7%	1,201
2	Midlife Constants (5E)	10.1%	30.4%	2.5%	4.2%	397
3	Bright Young Professionals (8C)	9.8%	40.2%	2.2%	6.4%	444
4	Southwestern Families (7F)	8.8%	49.0%	0.8%	7.2%	1,055
5	Old and Newcomers (8F)	8.1%	57.1%	2.3%	9.5%	347
	Subtotal	57.1%		9.5%		
6	Home Improvement (4B)	7.7%	64.8%	1.7%	11.2%	450
7	American Dreamers (7C)	4.6%	69.4%	1.5%	12.7%	315
8	Comfortable Empty Nesters (5A)	3.8%	73.2%	2.5%	15.2%	151
9	Soccer Moms (4A)	3.3%	76.5%	2.8%	18.0%	116
10	Front Porches (8E)	3.0%	79.5%	1.6%	19.6%	187
	Subtotal	22.4%		10.1%		
11	Metro Fusion (11C)	2.4%	81.9%	1.4%	21.0%	172
12	Set to Impress (11D)	2.4%	84.3%	1.4%	22.4%	172
13	NeWest Residents (13C)	1.9%	86.2%	0.8%	23.2%	249
14	Urban Villages (7B)	1.7%	87.9%	1.1%	24.3%	160
15	Up and Coming Families (7A)	1.7%	89.6%	2.2%	26.5%	77
	Subtotal	10.1%		6.9%		
16	In Style (5B)	1.6%	91.2%	2.3%	28.8%	72
17	Golden Years (9B)	1.5%	92.7%	1.3%	30.1%	115
18	Parks and Rec (5C)	1.4%	94.1%	2.0%	32.1%	72
19	Down the Road (10D)	1.4%	95.5%	1.1%	33.2%	127
20	Barrios Urbanos (7D)	1.4%	96.9%	1.0%	34.2%	137
	Subtotal	7.3%		7.7%		
	Total	97.0%		34.3%		283



LifeMode Group • Midtown Singles

11B YOUNG AND RESTLESS

Gen Y comes of age: Well-educated young workers, some of whom are still completing their education, are employed in professional/technical occupations, as well as sales and office/administrative support roles.

These residents are not established yet, but striving to get ahead and improve themselves. This market ranks in the top 5 for renters, movers, college enrollment, and labor force participation rate. Almost 1 in 5 residents move each year. Close to half of all householders are under the age of 35, the majority living alone or in shared nonfamily dwellings. Median household income is still below the US. Smartphones are a way of life, and they use the Internet extensively. Young and Restless consumers are diverse, favoring densely populated neighborhoods in large metropolitan areas; over 50% are located in the South (almost a fifth in Texas), with the rest chiefly in the West and Midwest.

US Household // 2,005,000

Average Household Size // 2.02

Median Age // 29.4

Median Household Income // \$36,000

+ OUR NEIGHBORHOOD

- One of the youngest markets: Half the householders under age 35; median age 29.4.
- Primarily single-person households (Index 163) with some shared households (Index 201).
- Highly mobile market, beginning careers and changing addresses frequently.
- Naturally, one of the top 5 renter markets (Index 237).
- Apartment rentals popular: 45% in 5–19 unit buildings (Index 507), 26% in 20+ unit buildings (Index 325).
- Majority of housing built in 1970 or later (83%).

+ MARKET PROFILE

(Consumer preferences are estimated from data by GfK MRI)

- No landline telephone for majority of HHs, preferring a cell phone only.
- Use their cell phone to text, listen to music, pay bills, redeem coupons, look up directions, and access financial information.
- Online activities include banking (with paperless statements), purchasing items on eBay, accessing Twitter and Facebook, and watching movies and TV shows.
- Enjoy dancing, playing pool, watching MTV and Comedy Central programs, reading fashion magazines, and playing volleyball.
- Listen to blues, jazz, rap, hip hop, and dance music, and read music magazines.
- Purchase natural/organic food, but frequent fast food restaurants.

+ SOCIOECONOMIC TRAITS

- Education completed: 2 out of 3 have some college, an associate's degree, or a bachelor's degree or higher. Education in progress: almost 15% are still enrolled in college (Index 185).
- Labor force participation rate is exceptionally high at 75.4%; unemployment is low at 7.8%.
- These are careful shoppers, aware of prices, and demonstrate little brand loyalty.
- They like to be the first to try new products, but prefer to do research before buying the latest electronics.
- Most of their information comes from the Internet and TV, rather than traditional media.
- Carry their cell phone everywhere they go.

+ 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

Average Rent:

\$920

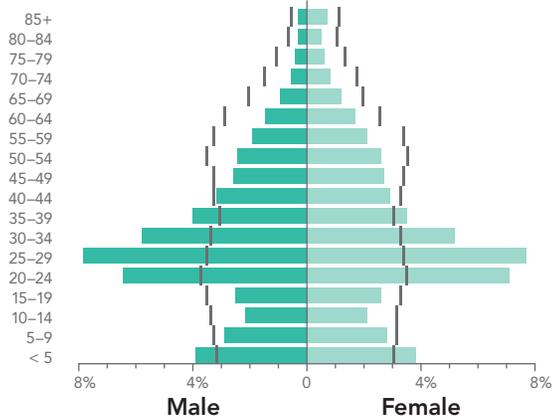
US Average: \$990



AGE BY SEX (Esri data)

Median Age: 29.4 US: 37.6

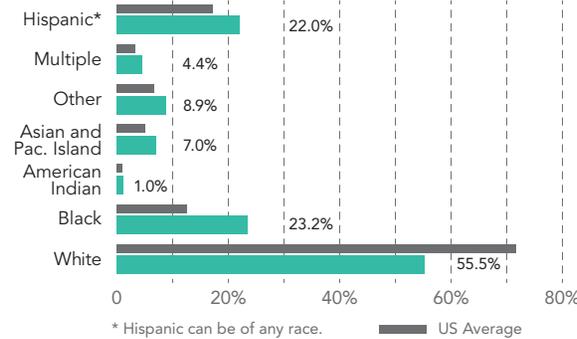
I Indicates US



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).

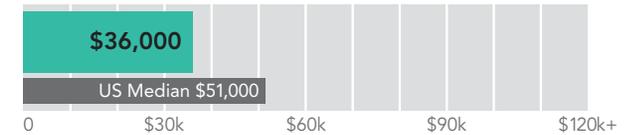
Diversity Index: 76.0 US: 62.1



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

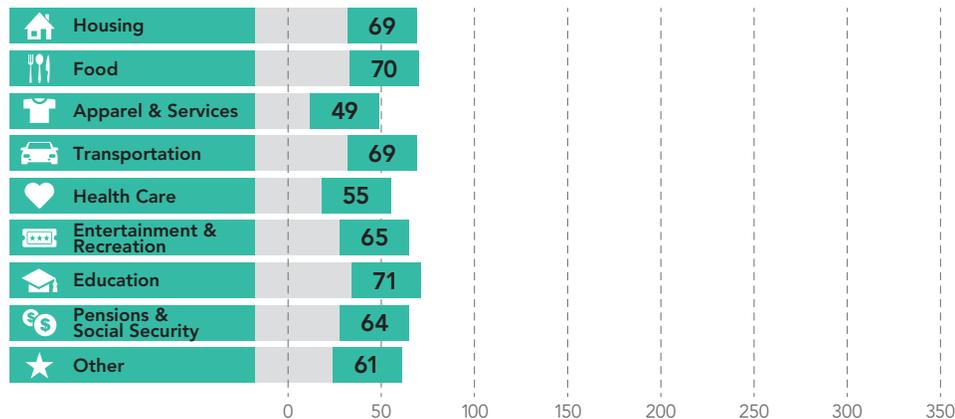


Median Net Worth



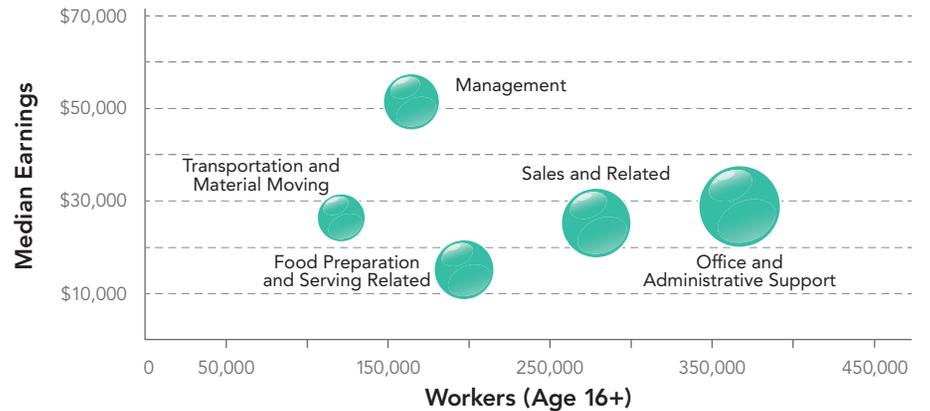
AVERAGE HOUSEHOLD BUDGET INDEX

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

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).



+ 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

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:

\$141,000

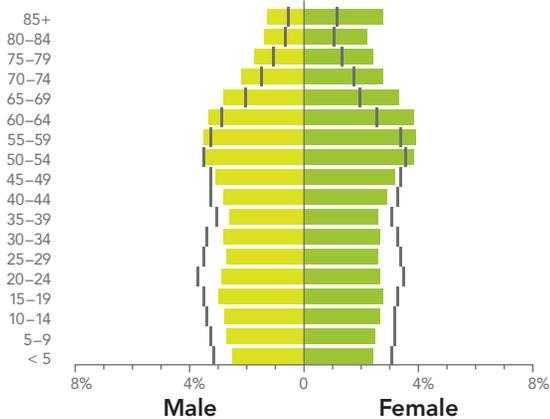
US Median \$177,000



AGE BY SEX (Esri data)

Median Age: 45.9 US: 37.6

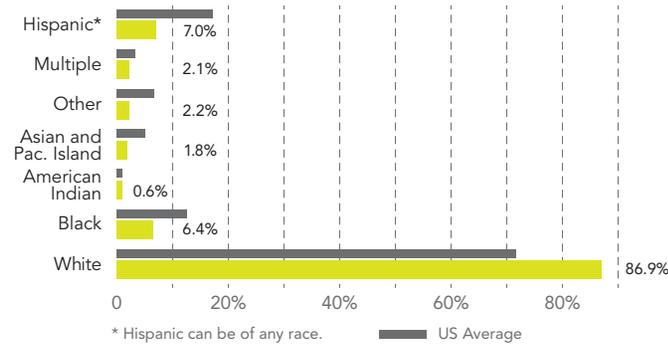
I Indicates US



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: 34.0 US: 62.1



INCOME AND NET WORTH

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Median Household Income

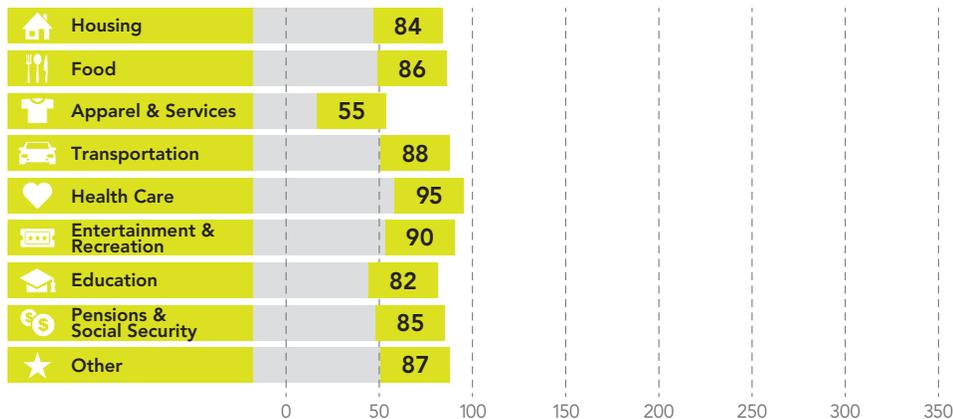


Median Net Worth



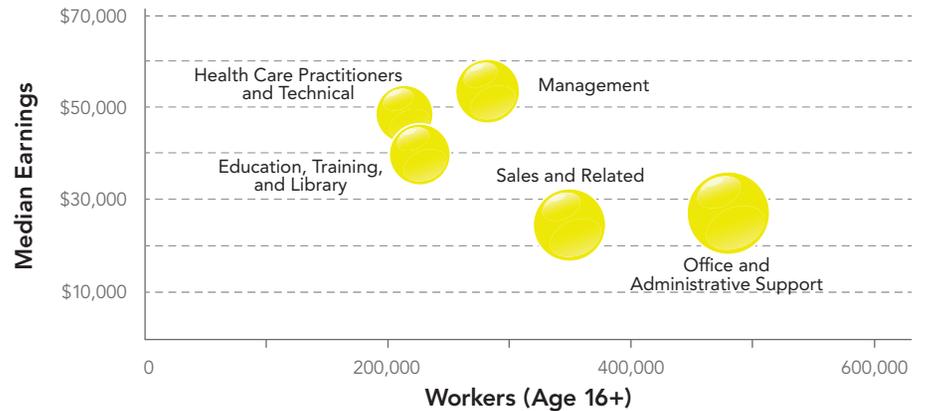
AVERAGE HOUSEHOLD BUDGET INDEX

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 • Middle Ground



BRIGHT YOUNG PROFESSIONALS

Bright Young Professionals is a large market, primarily located in urban outskirts of large metropolitan areas.

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

US Household // 2,613,000
Average Household Size // 2.40
Median Age // 32.2
Median Household Income // \$50,000

+ OUR NEIGHBORHOOD

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



8C

+ MARKET PROFILE

(Consumer preferences are estimated from data by GfK MRI)

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

+ SOCIOECONOMIC TRAITS

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

+ HOUSING

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



Typical Housing:

Single Family;
Multiunits

Average Rent:

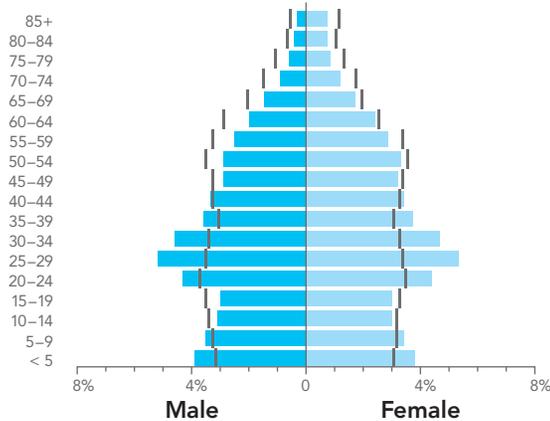
\$1,000
US Average \$990



AGE BY SEX (Esri data)

Median Age: 32.2 US: 37.6

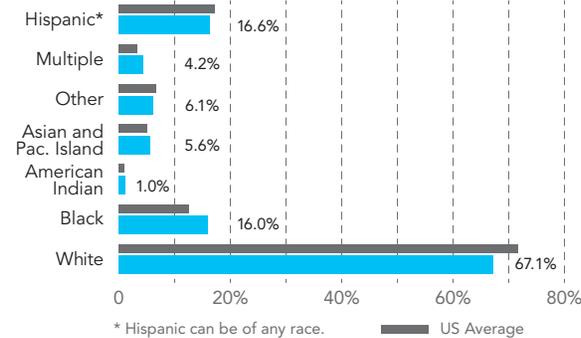
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RACE AND ETHNICITY (Esri data)

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: 65.4 US: 62.1



INCOME AND NET WORTH

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

Median Household Income

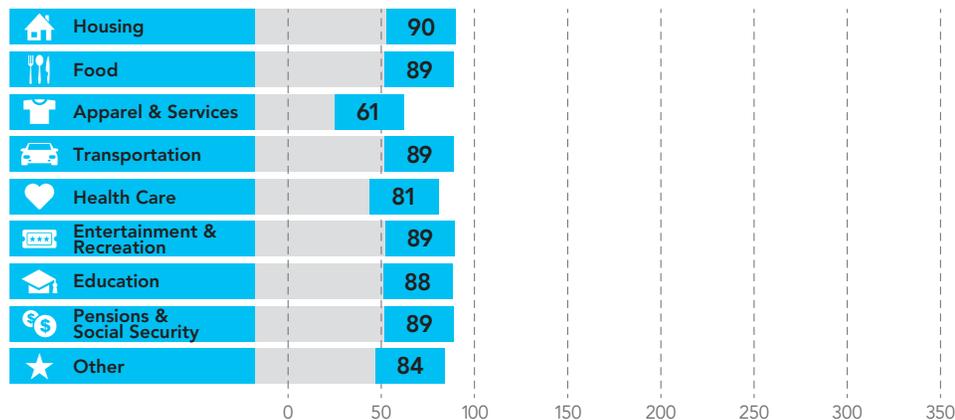


Median Net Worth



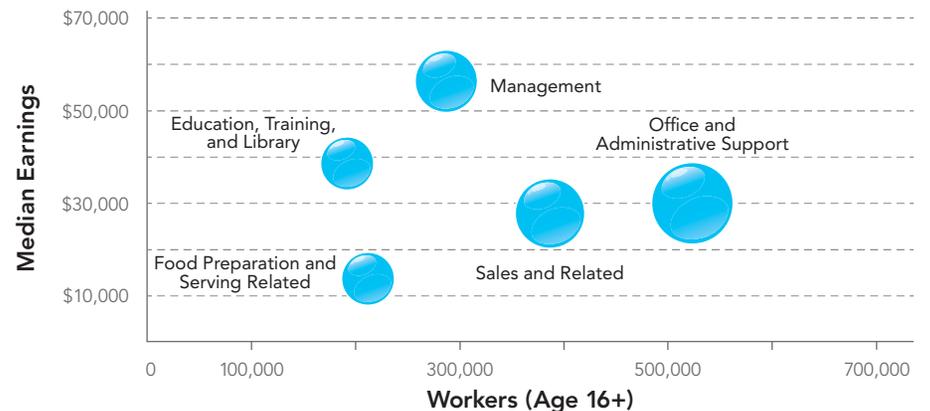
AVERAGE HOUSEHOLD BUDGET INDEX

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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 • Ethnic Enclaves



SOUTHWESTERN FAMILIES

Residents in these neighborhoods are young families that form the foundation of Hispanic life in the Southwest.

Children are the center of households that are composed mainly of married couples with children and single-parent families. Grandparents are caregivers in some of these households. Recent arrivals and older generations are language-isolated. Much of the working-age population is employed in blue-collar occupations, specializing in skilled work, as well as building maintenance and service jobs. Spending is focused on the family and at-home entertainment, but they do like to gamble (casinos and lottery tickets).

US Household // 1,000,000
Average Household Size // 3.17
Median Age // 33.8
Median Household Income // \$27,000

+ OUR NEIGHBORHOOD

- A family market: Married couples with kids, single parents, and grandparents head these households.
- Average household size is higher at 3.17 (Index 123).
- Many residents were born abroad (Index 237); many households have residents who speak only Spanish (Index 594).
- Over 40% of householders rent single-family homes within a mix of urban city centers and the suburbs in metropolitan areas.
- Neighborhoods are older; most of the homes constructed prior to 1970.
- Over 70% of all households have one or two vehicles available.



+ MARKET PROFILE

(Consumer preferences are estimated from data by GfK MRI)

- Television is a primary source of entertainment, and most homes have multiple sets.
- Although residents watch their spending, they typically carry balances on credit cards.
- Baby and children's products, such as food, clothing, and equipment, are common purchases.
- They shop at pharmacies such as CVS, as well as discount department stores like Marshalls and Sears.
- They listen to Hispanic radio and watch Hispanic programming on television.
- Most households have landlines—used frequently for international calls.
- About 2 out of 3 households are connected, although access to the Internet is used primarily for entertainment.

+ SOCIOECONOMIC TRAITS

- While close to 30% have attended or graduated from college, over 40% did not complete high school, which has limited their employment prospects.
- High rate of unemployment is at 12% (Index 139), and low labor force participation is at 52% (Index 83).
- Most households receive income from wages or salaries, but over 35% receive contributions from Social Security and over 10% from Supplemental Security Income.
- While budget-conscious consumers, they are also mindful of quality and attentive to environmental concerns in their purchasing decisions.
- Often, purchase decisions are based on how a product may improve or organize their lives.

+ HOUSING

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Typical Housing:

Single Family

Median Value:

\$92,000

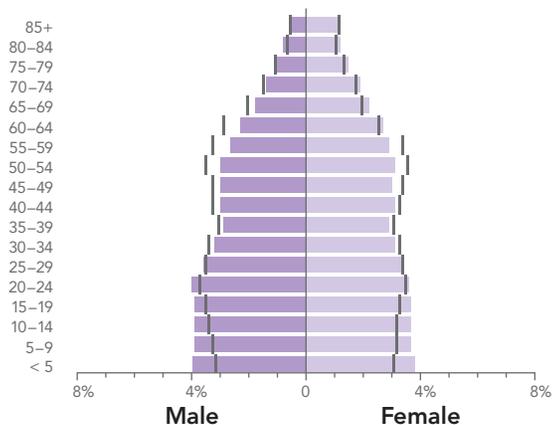
US Median: \$177,000



AGE BY SEX (Esri data)

Median Age: 33.8 US: 37.6

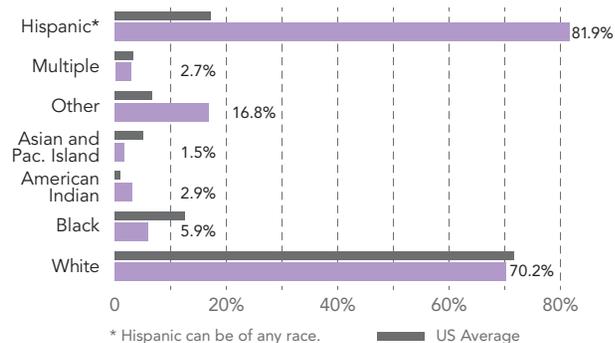
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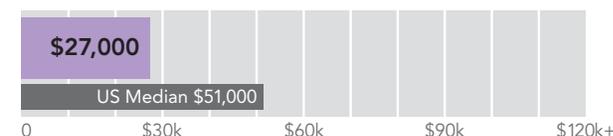
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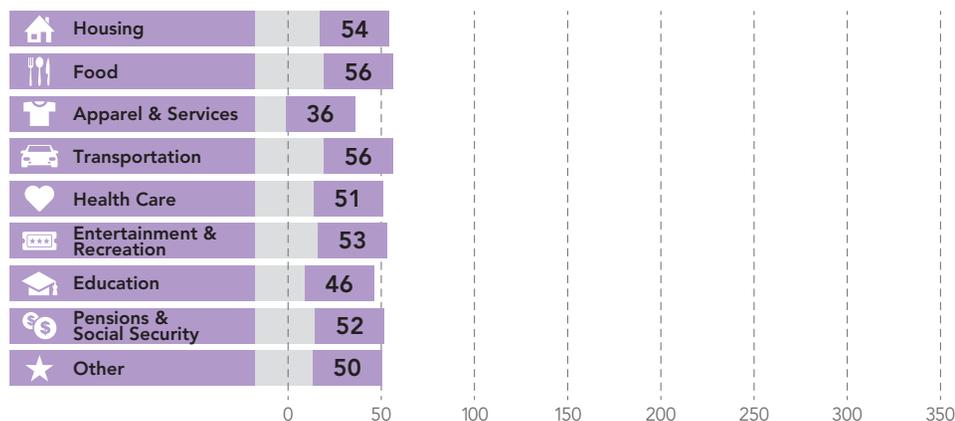


Median Net Worth



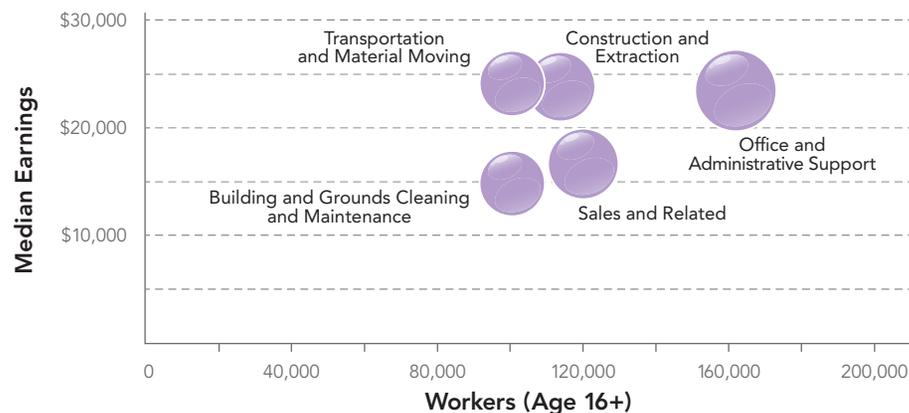
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LifeMode Group • Middle Ground

8F OLD AND NEWCOMERS

This market features singles' lifestyles, on a budget.

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

US Household // 2,774,000
Average Household Size // 2.11
Median Age // 38.5
Median Household Income // \$39,000

+ OUR NEIGHBORHOOD



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

8F

+ MARKET PROFILE

(Consumer preferences are estimated from data by GfK MRI)

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

+ SOCIOECONOMIC TRAITS

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

+ HOUSING

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



Typical Housing:

Single Family;
Multiunits

Average Rent:

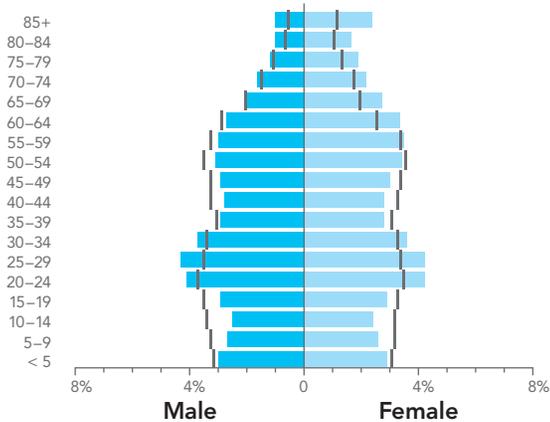
\$850
US Average \$990



AGE BY SEX (Esri data)

Median Age: 38.5 US: 37.6

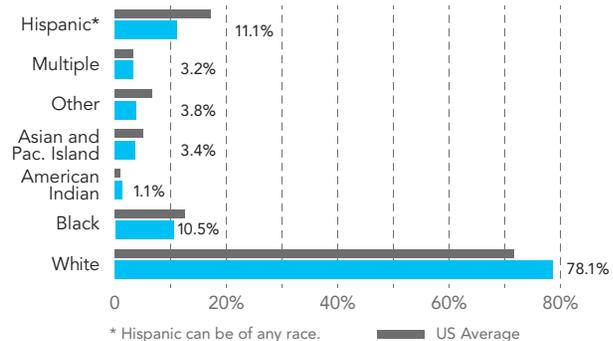
I Indicates US



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).

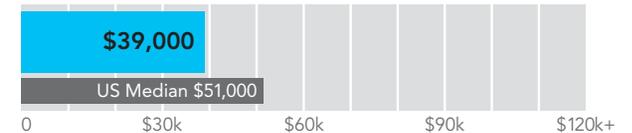
Diversity Index: 50.1 US: 62.1



INCOME AND NET WORTH

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

Median Household Income

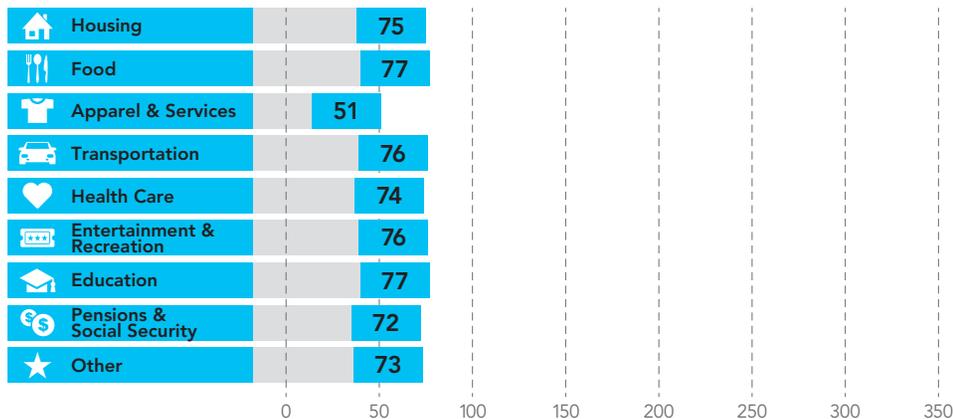


Median Net Worth



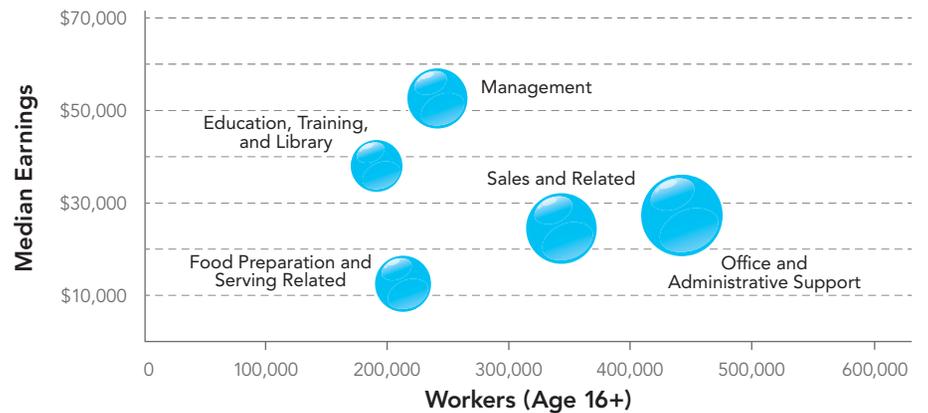
AVERAGE HOUSEHOLD BUDGET INDEX

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.





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

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 Retail:360 process, The Retail Coach offers a dynamic system of products and services that better enable communities to maximize their retail development potential.

Retail:360 Process

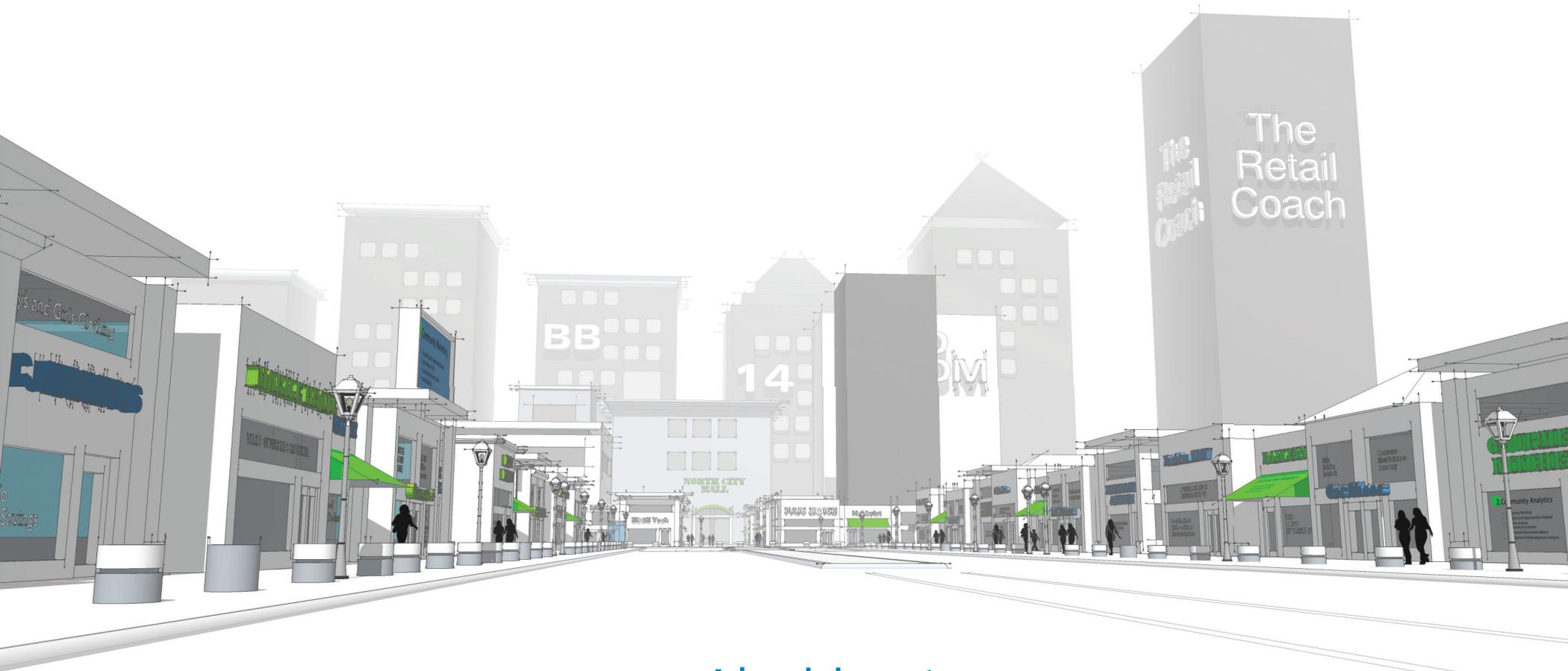
Providing more than simple data reports of psychographic and demographic trends, The Retail Coach goes well beyond other retail consulting and market research firms’ offerings by combining current national and statewide demographics and trend data with real-world, “on-the-ground” data gathered through 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 Retail:360 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.

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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.

Sources used in completing this study include: infoUSA™, Applied Geographic Solutions, Nielsen 2014/2015, ESRI 2014, 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.