



TheRetailCoach®

OTHELLO RETAIL TRADE AREA PSYCHOGRAPHIC PROFILE

Adams County, Washington

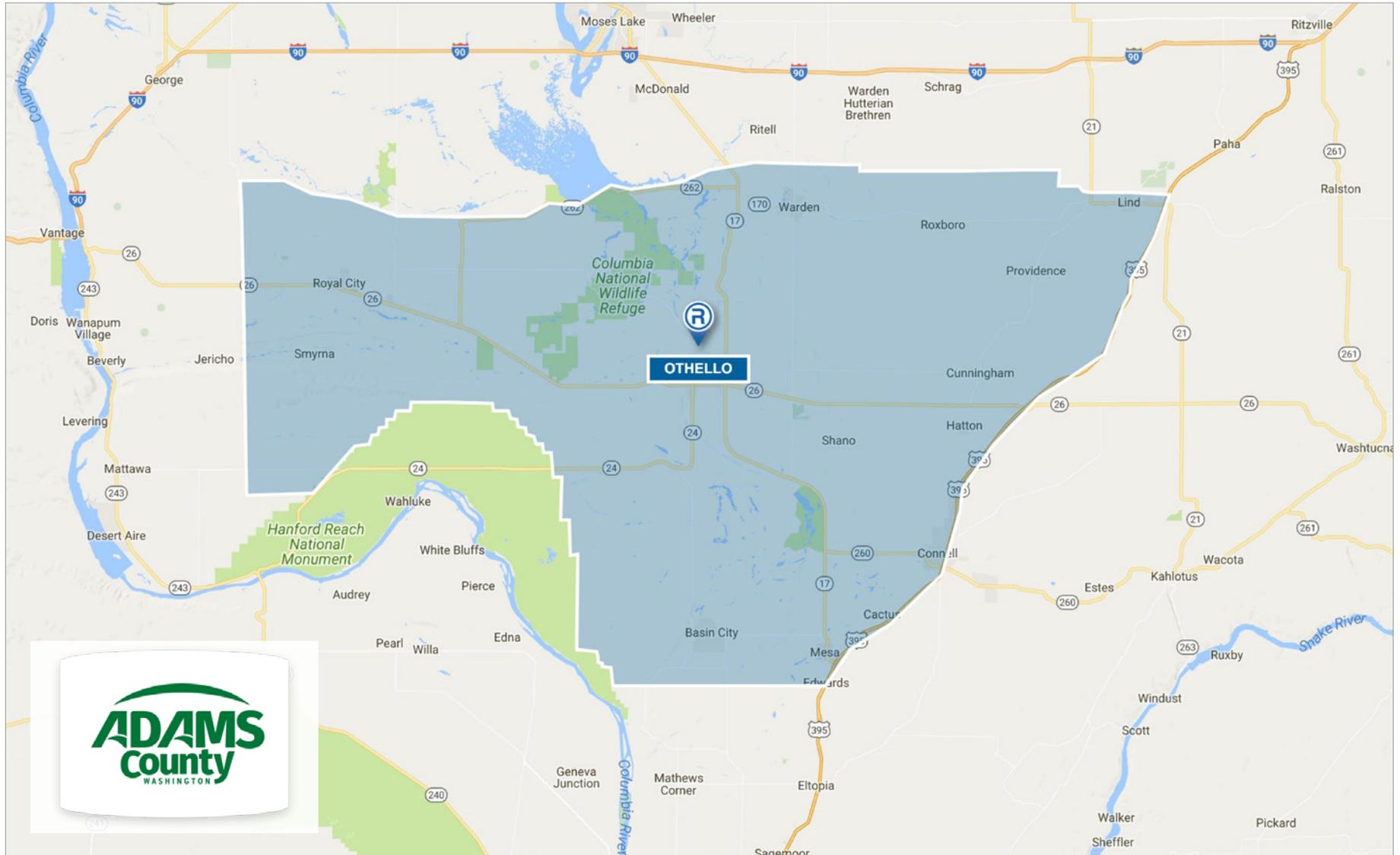
Prepared for
Adams County
May 2018





OTHELLO RETAIL TRADE AREA

Adams County, Washington



CONTACT

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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.

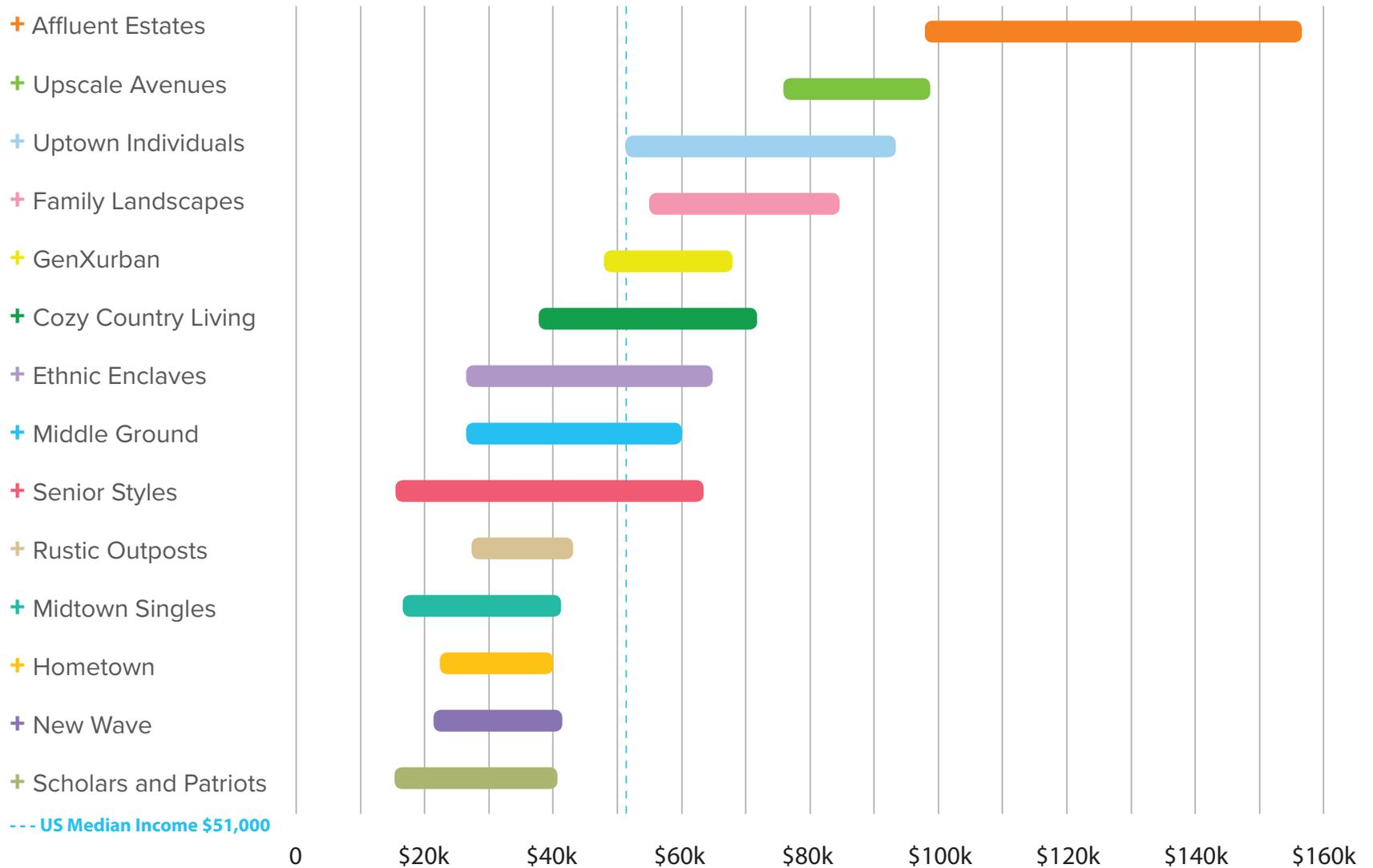
+ TAPESTRY SEGMENTATION SUMMARY GROUPS

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

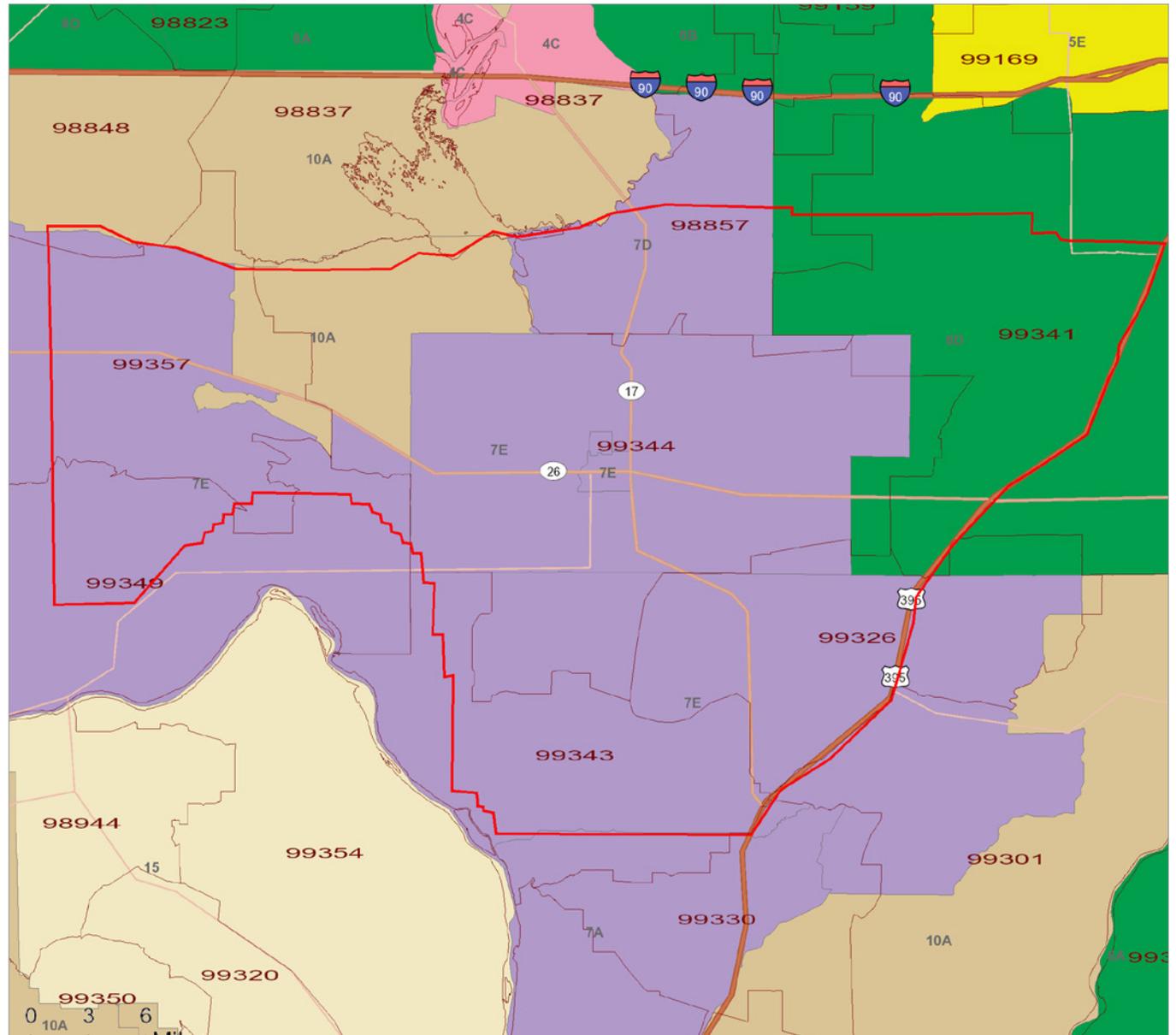




OTHELLO RETAIL TRADE AREA • LIFEMODE SUMMARY GROUPS MAP

Adams County, Washington

- + 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





OTHELLO RETAIL TRADE AREA • TOP TAPESTRY SEGMENTS

Adams County, Washington

	TAPESTRY SEGMENTATION	HOUSEHOLDS PERCENT	CUMULATIVE PERCENT	US HOUSEHOLDS PERCENT	CUMULATIVE PERCENT	INDEX
1	Valley Growers (7E)	49.3%	49.3%	0.2%	0.2%	20245
2	Barrios Urbanos (7D)	21.5%	70.8%	1.0%	1.2%	2,054
3	Southern Satellites (10A)	9.8%	80.6%	3.1%	4.3%	312
4	American Dreamers (7C)	6.9%	87.5%	1.5%	5.8%	466
5	Prairie Living (6D)	5.6%	93.1%	1.1%	6.9%	525
	Subtotal	93.1%		6.9%		
6	Soccer Moms (4A)	4.8%	97.9%	2.9%	9.8%	166
7	Middleburg (4C)	2.1%	100.0%	2.9%	12.7%	75
	Subtotal	6.9%		5.8%		
	Total	100.0%		12.7%		787



LifeMode Group • Ethnic Enclaves

7E

VALLEY GROWERS

Valley Growers is a small, but distinctive market, located almost entirely in the West (primarily in California and Washington).

These neighborhoods are home to young, Hispanic families with children and, frequently, multiple generations living in single-family homes. Most residents are Hispanic (mostly of Mexican origin). A third is foreign born; 30% of households are linguistically isolated. This market is all about spending time with family, taking care of family and home, and following the Hispanic heritage. More homes are rented than owned, located in semirural areas where agriculture dominates. Unemployment is high, and household income is much lower than the US, supplemented by self-employment, home-grown products, and some public assistance. Consumers favor Spanish language media and outdoor activities.

US Household // 293,000

Average Household Size // 3.96

Median Age // 26.6

Median Household Income // \$32,000

+ OUR NEIGHBORHOOD

- Young families dominate this market, with a median age less than 27 and an average household size of 3.96 (Index 153). Average family size is also higher, at 4.24 (Index 135), with a number of multigenerational households (Index 266).
- Dominant household types: 38% are married-couple families with children (Index 174) and 21% are single-parent families (Index 182).
- Most households (about 56%) rent their homes.
- Homes are primarily single family homes (60%), with a large share of mobile homes (more than twice the US) and multiunit (2–4 units) dwellings (Index 143).
- Three-fifths of homes were built before 1980.



7E

+ MARKET PROFILE

(Consumer preferences are estimated from data by GfK MRI)

- Commonly own a used station wagon or subcompact car, serviced by an HH member.
- Many pay bills in person and prepare their taxes manually.
- Work on home improvement projects, such as painting the house.
- Key expenditures include groceries and children’s products.
- Favor shopping at Costco, Marshalls, Kmart, Sears, Walmart, and Target.
- Minimal online usage, but visit Spanish language websites.
- Enjoy listening to the radio, doing crossword puzzles, photo album/scrapbooking, dancing, going on overnight camping trips, backpacking, hiking, and playing pool, Frisbee, and football.
- Prefer to watch programs on Spanish TV networks and Discovery Channel, and read parenting and automotive magazines.
- Listen to a variety of music, especially Spanish/Latin music.

+ SOCIOECONOMIC TRAITS

- Only 44% have a high school diploma; half of the high school graduates have completed some college or a degree.
- 30% of households have members who speak only Spanish (Index 635).
- Primarily skilled work force, in agriculture; unemployment is high at 14% (Index 163).
- Median household income is lower, primarily from wages with assistance from Supplemental Security Income (Index 185) and public assistance income (Index 325).
- They are cost-conscious consumers, willing to shop around to obtain the best price, as their number one goal when shopping is to save as much money as possible.
- Spending time with family is a top priority.
- They use TV more than any other media to stay informed.

+ 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.



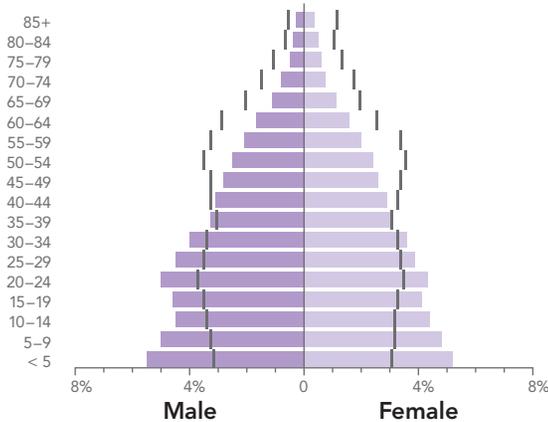
Typical Housing:
Single Family
Average Rent:
\$810
US Average \$990



AGE BY SEX (Esri data)

Median Age: 26.6 US: 37.6

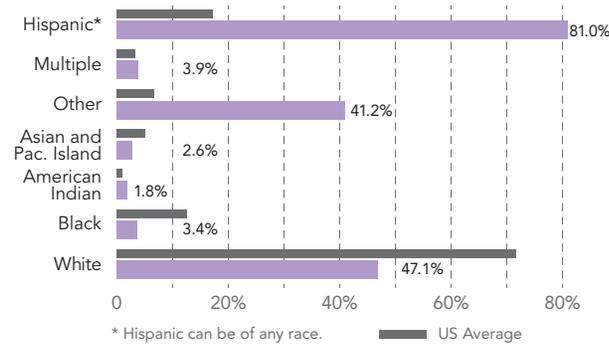
I Indicates US



RACE AND ETHNICITY (Esri data)

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

Diversity Index: 84.5 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

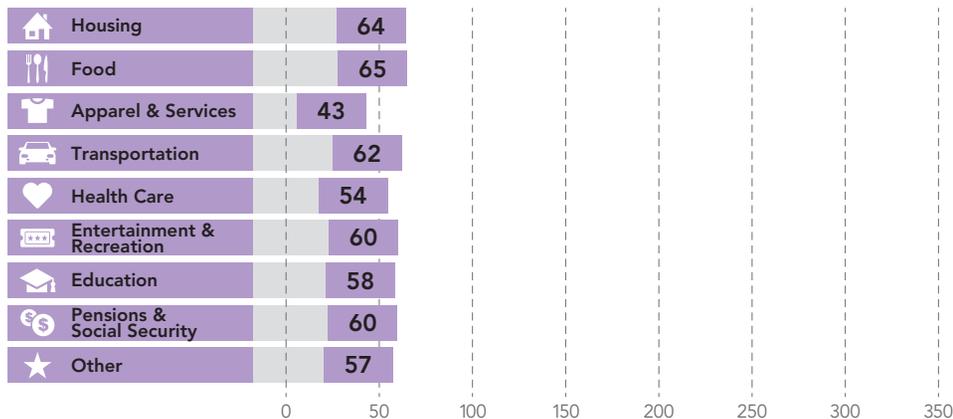


Median Net Worth



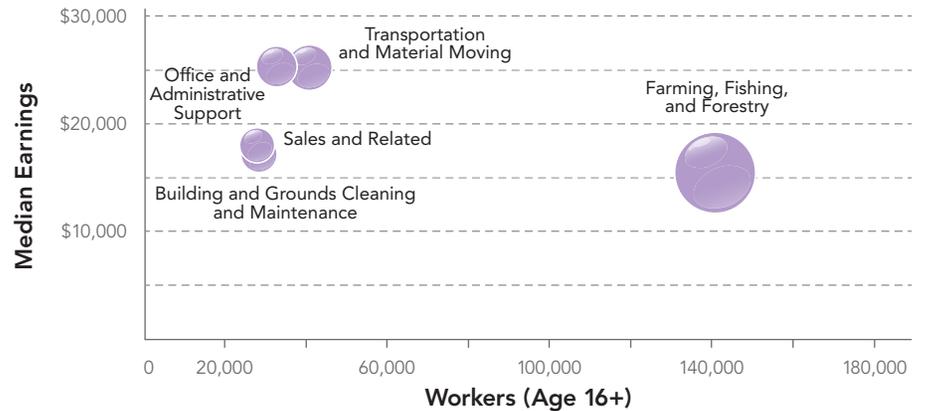
AVERAGE HOUSEHOLD BUDGET INDEX

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.





LifeMode Group • Ethnic Enclaves



BARRIOS URBANOS

Family is central within these diverse communities. Hispanics make up more than 70% of the residents.

More than one in four are foreign born, bringing rich cultural traditions to these neighborhoods in the urban outskirts. Dominating this market are younger families with children or single-parent households with multiple generations living under the same roof. These households balance their budgets carefully but also indulge in the latest trends and purchase with an eye to brands. Most workers are employed in skilled positions across the manufacturing, construction, or retail trade sectors.

US Household // 1,243,000
Average Household Size // 3.59
Median Age // 28.3
Median Household Income // \$36,000

+ OUR NEIGHBORHOOD

- Family market; over a third of all households are married couples with children, with a number of multigenerational households and single-parent families; household size is higher at 3.59.
- While most residents live in single-family homes, almost 10% of householders reside in mobile home parks.
- Homes are owner occupied, with slightly higher monthly costs (Index 106) but fewer mortgages (Index 89).
- Most are older homes, more than 60% built from 1950 to 1989.
- Most households have one or two vehicles; many commuters car pool or walk to work (Index 152).
- Barrios Urbanos residents live within the urban periphery of larger metropolitan areas across the South and West.



7D

+ MARKET PROFILE

(Consumer preferences are estimated from data by GfK MRI)

- Residents shop at discount department stores for baby and children’s products.
- Many households subscribe to satellite television to watch their favorite Hispanic programs.
- Magazines are extremely popular sources of news and the latest trends, including baby, bridal, and parenthood types of magazines.
- Typical of this diverse segment, Hispanic programming dominates the radio dials.

+ SOCIOECONOMIC TRAITS

- While a majority finished high school, over 40% have not (Index 303).
- Unemployment is higher at 12% (Index 135); labor force participation is slightly lower at 61%.
- Nearly one in four households is below the poverty level (Index 179).
- Residents balance their budgets carefully by spending only on necessities and limiting activities like dining out.
- Many have no financial investments or retirement savings, but they have their homes.

+ 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.



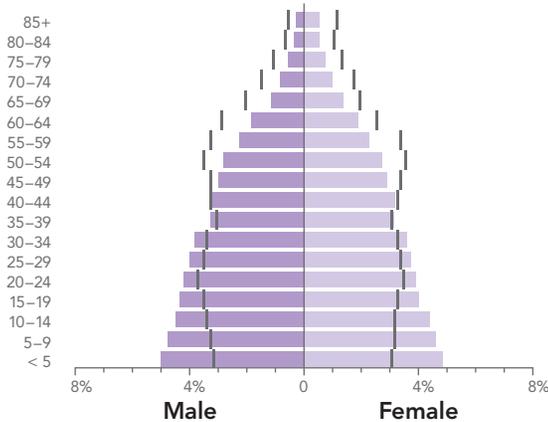
Typical Housing:
Single Family
Median Value:
\$92,000
US Median \$177,000



AGE BY SEX (Esri data)

Median Age: 28.3 US: 37.6

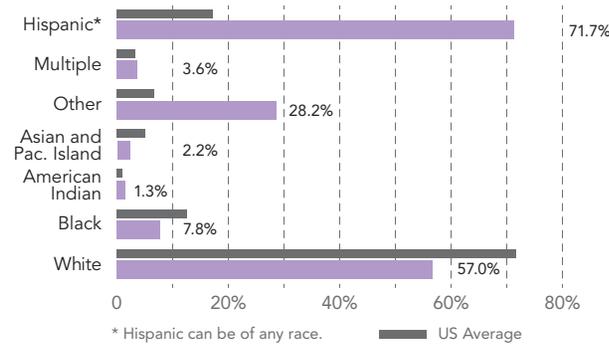
I Indicates US



RACE AND ETHNICITY (Esri data)

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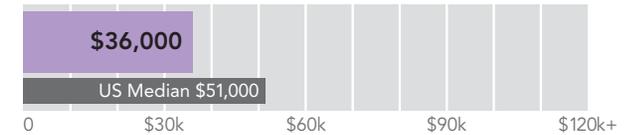
Diversity Index: 80.3 US: 62.1



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

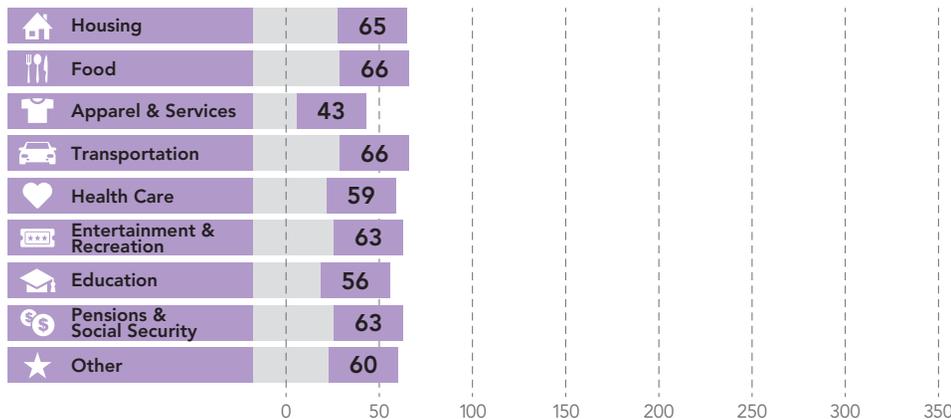


Median Net Worth



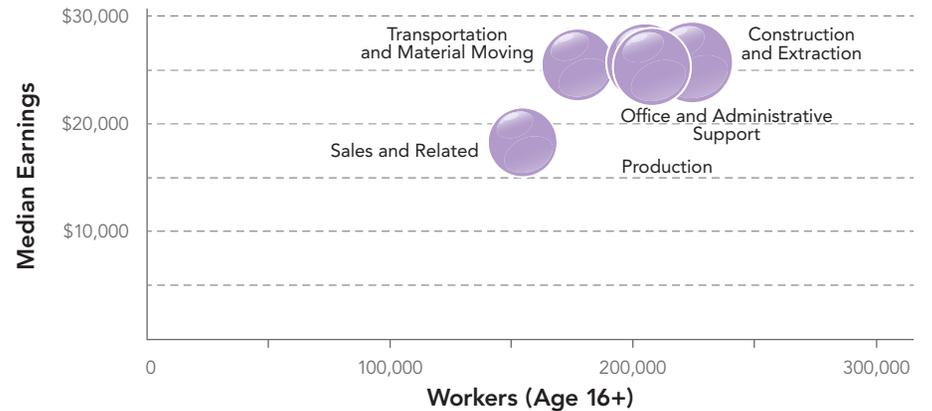
AVERAGE HOUSEHOLD BUDGET INDEX

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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 • Rustic Outposts

10A

SOUTHERN SATELLITES

Southern Satellites is the second largest market found in rural settlements but within metropolitan areas located primarily in the South.

This market is typically nondiverse, slightly older, settled married-couple families, who own their homes. Almost two-thirds of the homes are single-family structures; a third are mobile homes. Median household income and home value are below average. Workers are employed in a variety of industries, such as manufacturing, health care, retail trade, and construction, with higher proportions in mining and agriculture than the US. Residents enjoy country living, preferring outdoor activities and DIY home projects.

US Household // 3,775,000

Average Household Size // 2.65

Median Age // 39.7

Median Household Income // \$44,000

+ OUR NEIGHBORHOOD

- About 79% of households are owned.
- Married couples with no children are the dominant household type, with a number of multigenerational households (Index 112).
- Most are single-family homes (65%), with a number of mobile homes (Index 523).
- Most housing units were built in 1970 or later.
- Most households own 1 or 2 vehicles, but owning 3+ vehicles is common (Index 146).



10A

+ MARKET PROFILE

(Consumer preferences are estimated from data by GfK MRI)

- Usually own a truck; likely to service it themselves.
- Frequent the convenience store, usually to fill up a vehicle with gas.
- Typical household has a satellite dish.
- Work on home improvement and remodeling projects.
- Own a pet, commonly a dog.
- Participate in fishing and hunting.
- Prefer to listen to country music and watch Country Music Television (CMT).
- Read fishing/hunting and home service magazines.
- Partial to eating at low-cost family restaurants and drive-ins.
- Use Walmart for all their shopping needs (groceries, clothing, pharmacy, etc.).

+ SOCIOECONOMIC TRAITS

- Education: almost 40% have a high school diploma only (Index 137); 41% have college education (Index 72).
- Unemployment rate is 9.2%, slightly higher than the US rate.
- Labor force participation rate is 59.7%, slightly lower than the US.
- These consumers are more concerned about cost rather than quality or brand loyalty.
- They tend to be somewhat late in adapting to technology.
- They obtain a disproportionate amount of their information from TV, compared to other media.

+ 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;
Mobile Homes

Median Value:

\$119,000

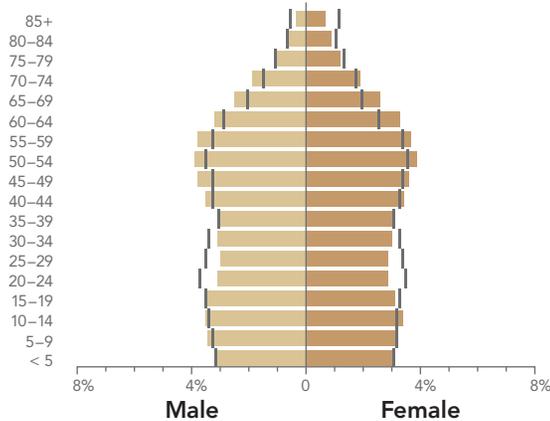
US Median: \$177,000



AGE BY SEX (Esri data)

Median Age: 39.7 US: 37.6

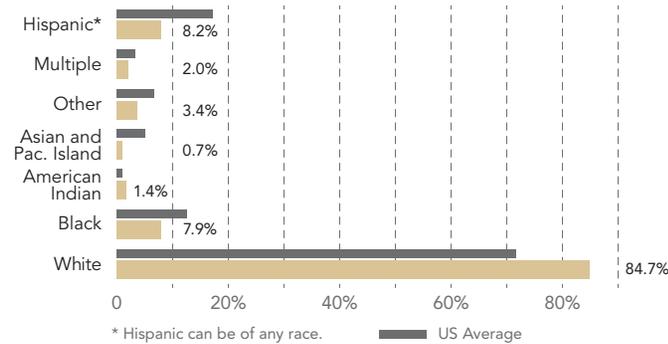
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RACE AND ETHNICITY (Esri data)

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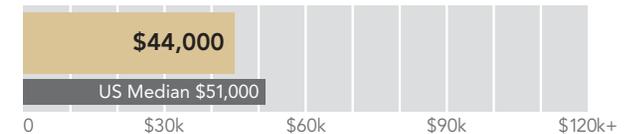
Diversity Index: 38.6 US: 62.1



INCOME AND NET WORTH

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Median Household Income

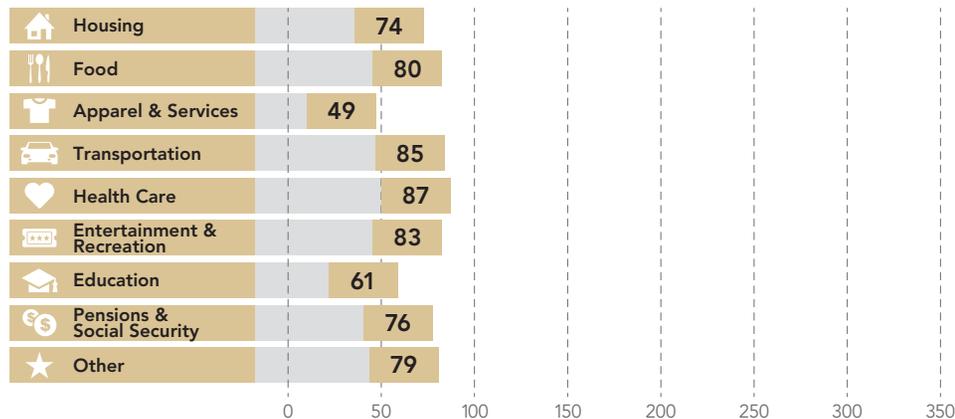


Median Net Worth



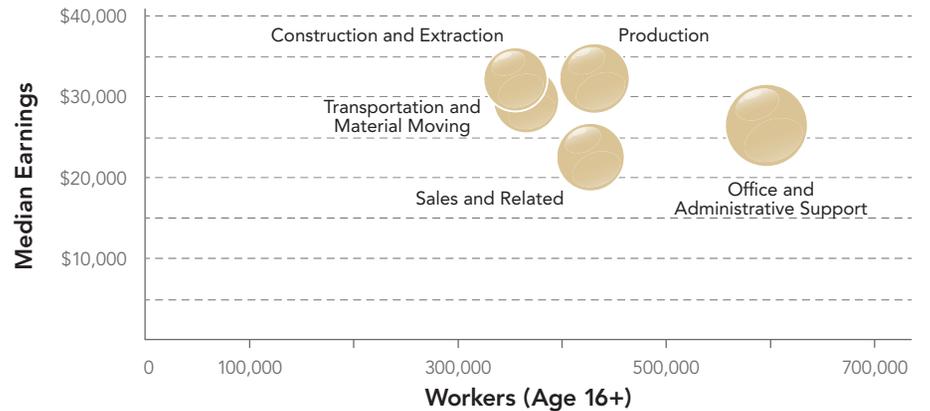
AVERAGE HOUSEHOLD BUDGET INDEX

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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

7C

AMERICAN DREAMERS

Located throughout the South and West, most American Dreamers residents own their own homes, primarily single-family housing, farther out of the city where housing is more affordable.

Median household income is slightly below average (Index 94). The majority of households include younger married-couple families with children and, frequently, grandparents. Diversity is high; many residents are foreign born, of Hispanic origin. Hard work and sacrifice have improved their economic circumstance as they pursue a better life for themselves and their family. Spending is focused more on the members of the household than the home. Entertainment includes multiple televisions, movie rentals, and video games at home or visits to theme parks and zoos. This market is connected and adept at accessing what they want from the Internet.

US Household // 1,747,000

Average Household Size // 3.16

Median Age // 31.8

Median Household Income // \$48,000

+ OUR NEIGHBORHOOD

- American Dreamers residents are family-centric and diverse. Most are married couples with children of all ages or single parents; multigenerational homes are common (Index 201).
- Average household size is higher at 3.16 (Index 122).
- Residents tend to live further out from urban centers—more affordable single-family homes and more elbow room.
- Tenure is slightly above average with 65% owner occupancy; primarily single-family homes with more mortgages (Index 122) and slightly higher monthly costs (Index 122).
- Three quarters of all housing were built since 1970.
- Many neighborhoods are located in the urban periphery of the largest metropolitan areas across the South and West.
- Most households have one or two vehicles available and a longer commute to work.



+ MARKET PROFILE

(Consumer preferences are estimated from data by GfK MRI)

- When dining out, these residents favor fast-food dining places such as Taco Bell or Wendy's, as well as family-friendly restaurants like Olive Garden, Denny's, or IHOP.
- Cell phones are preferred over landlines.
- Favorite channels include Animal Planet, MTV, Cartoon Network, and Disney, as well as programming on Spanish TV.
- Residents listen to urban or Hispanic radio.
- During the summer, family outings to theme parks are especially popular.

+ SOCIOECONOMIC TRAITS

- While nearly 16% have earned a college degree, the majority, or 63%, hold a high school diploma only or spent some time at a college or university.
- Unemployment is higher at 10.7% (Index 124); labor force participation is also higher at 67%.
- Most American Dreamers residents derive income from wages or salaries, but the rate of poverty is a bit higher in this market (Index 126).
- They tend to spend money carefully and focus more on necessities.
- They are captivated by new technology, particularly feature-rich smartphones.
- Connected: They use the Internet primarily for socializing but also for convenience, like paying bills online.

+ HOUSING

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Typical Housing:

Single Family

Median Value:

\$130,000

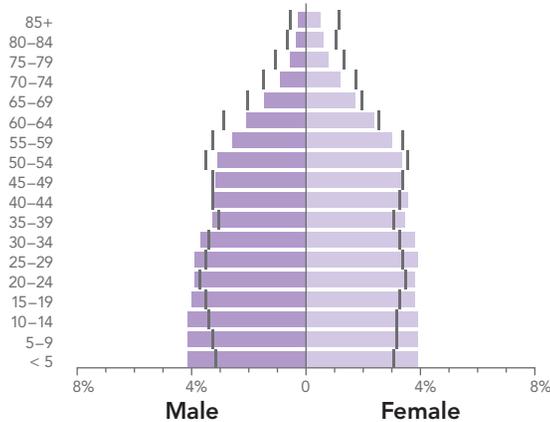
US Median: \$177,000



AGE BY SEX (Esri data)

Median Age: 31.8 US: 37.6

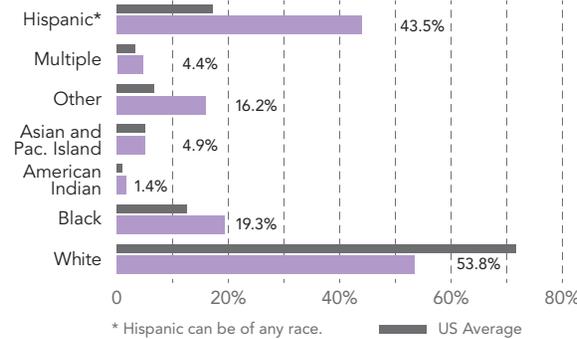
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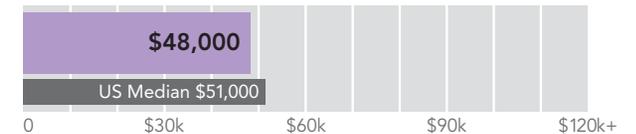
Diversity Index: 83.3 US: 62.1



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Median Household Income

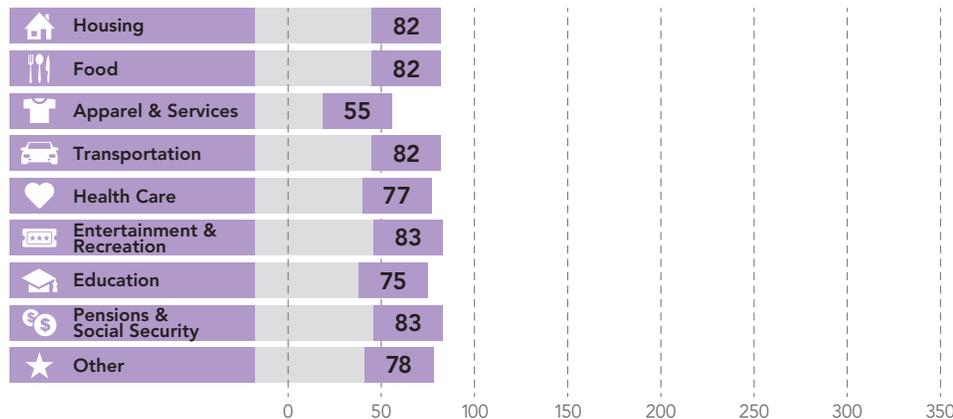


Median Net Worth



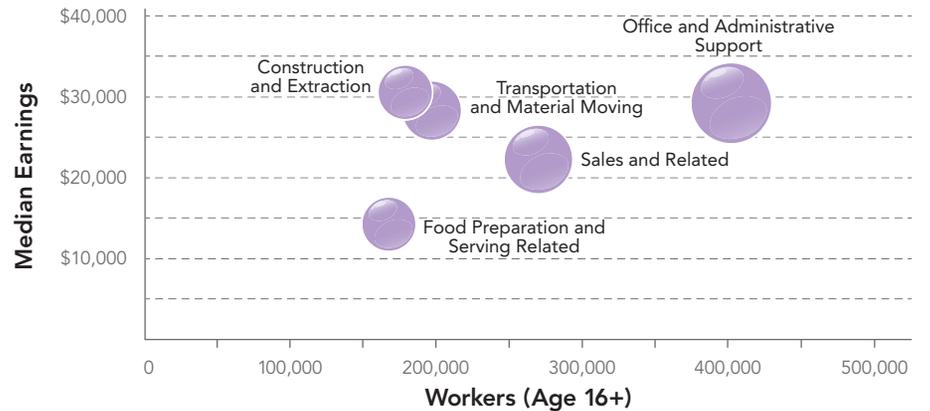
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OCCUPATION BY EARNINGS

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 • Cozy Country Living

6D PRAIRIE LIVING

Prairie Living is Tapestry Segmentation's most rural market, comprising about 1 percent of households, located mainly in the Midwest, with a predominance of self-employed farmers.

These agricultural communities are not diverse, dominated by married-couple families that own single-family dwellings and many vehicles. Median household income is similar to the US, and labor force participation is slightly higher. Faith is important to this hardworking market. When they find time to relax, they favor outdoor activities.

US Household // 1,307,000
Average Household Size // 2.50
Median Age // 43.4
Median Household Income // \$51,000

+ OUR NEIGHBORHOOD

- About four-fifths of households are owner occupied.
- Dominant household type is married-couples with no children.
- Most are single-family homes (87%) built before 1980; a higher proportion were built before 1940 (Index 225).
- Higher percentage of vacant housing units is at 16% (Index 137).
- Most households own 2 or 3 vehicles; this is the highest ranked market for owning 4 or more vehicles.



+ MARKET PROFILE

(Consumer preferences are estimated from data by GfK MRI)

- Many own a truck, riding lawn mower, and ATV/UTV and have a satellite dish.
- They purchased plants and seeds in the past year for their vegetable garden, where their tiller comes in handy.
- They favor banking in person, have noninterest checking accounts, invest in CDs (more than 6 months), and have term/whole life insurance.
- They are pet owners.
- Leisure activities include fishing, hunting, boating, camping, and attending country music concerts.
- Residents prefer to listen to faith and inspirational, as well as country music on the radio.
- They read home service, fishing/hunting, and automotive magazines.
- They contribute to religious organizations and belong to religious clubs.
- Walmart is a favorite shopping stop; Subway is a favorite eating spot.

+ SOCIOECONOMIC TRAITS

- Half have completed some college education or hold a degree.
- At 4.1%, the unemployment rate is less than half the US rate.
- Labor force participation rate slightly higher at 66%.
- Wage and salary income for 73% of households plus self-employment income for 27% (Index 242).
- Faith and religion are important to these residents.
- Tend to buy things when they need them, rather than when they want them or to be trendy.
- Somewhat resistant to new technology.
- Creatures of habit when purchasing food items.

+ HOUSING

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Typical Housing:

Single Family

Median Value:

\$125,000

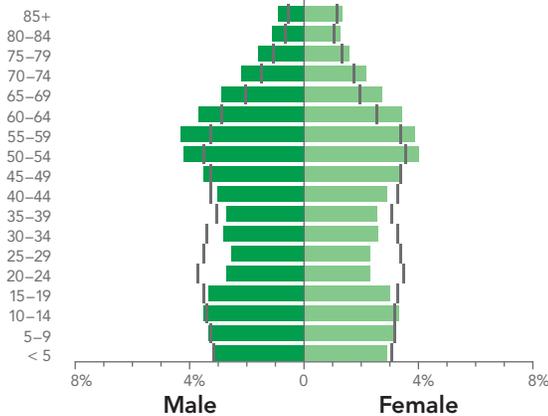
US Median \$177,000



AGE BY SEX (Esri data)

Median Age: 43.4 US: 37.6

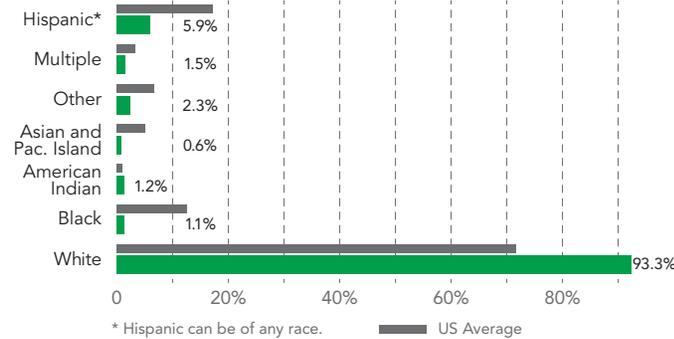
I Indicates US



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: 22.6 US: 62.1



INCOME AND NET WORTH

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

Median Household Income

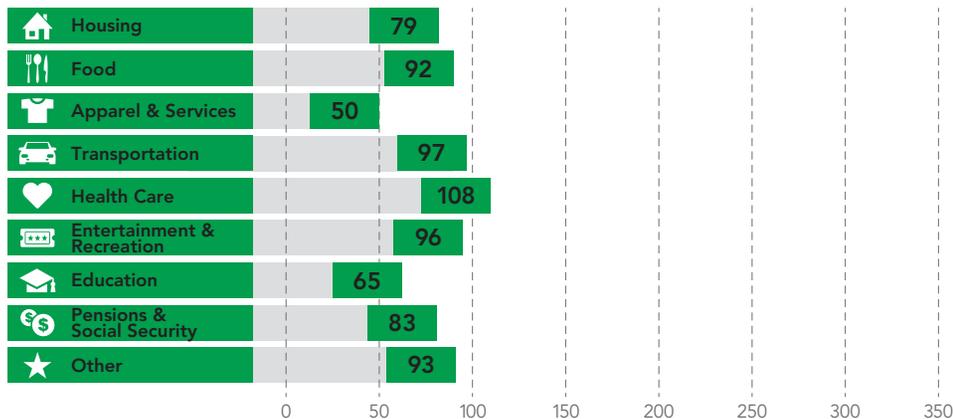


Median Net Worth



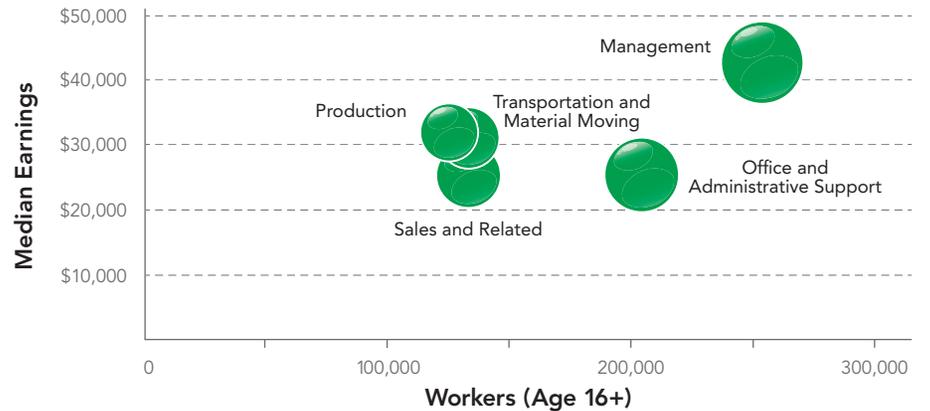
AVERAGE HOUSEHOLD BUDGET INDEX

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, Environic Analytics 2018, ESRI 2018, 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.