



TheRetailCoach®

RETAIL TRADE AREA PSYCHOGRAPHIC PROFILE

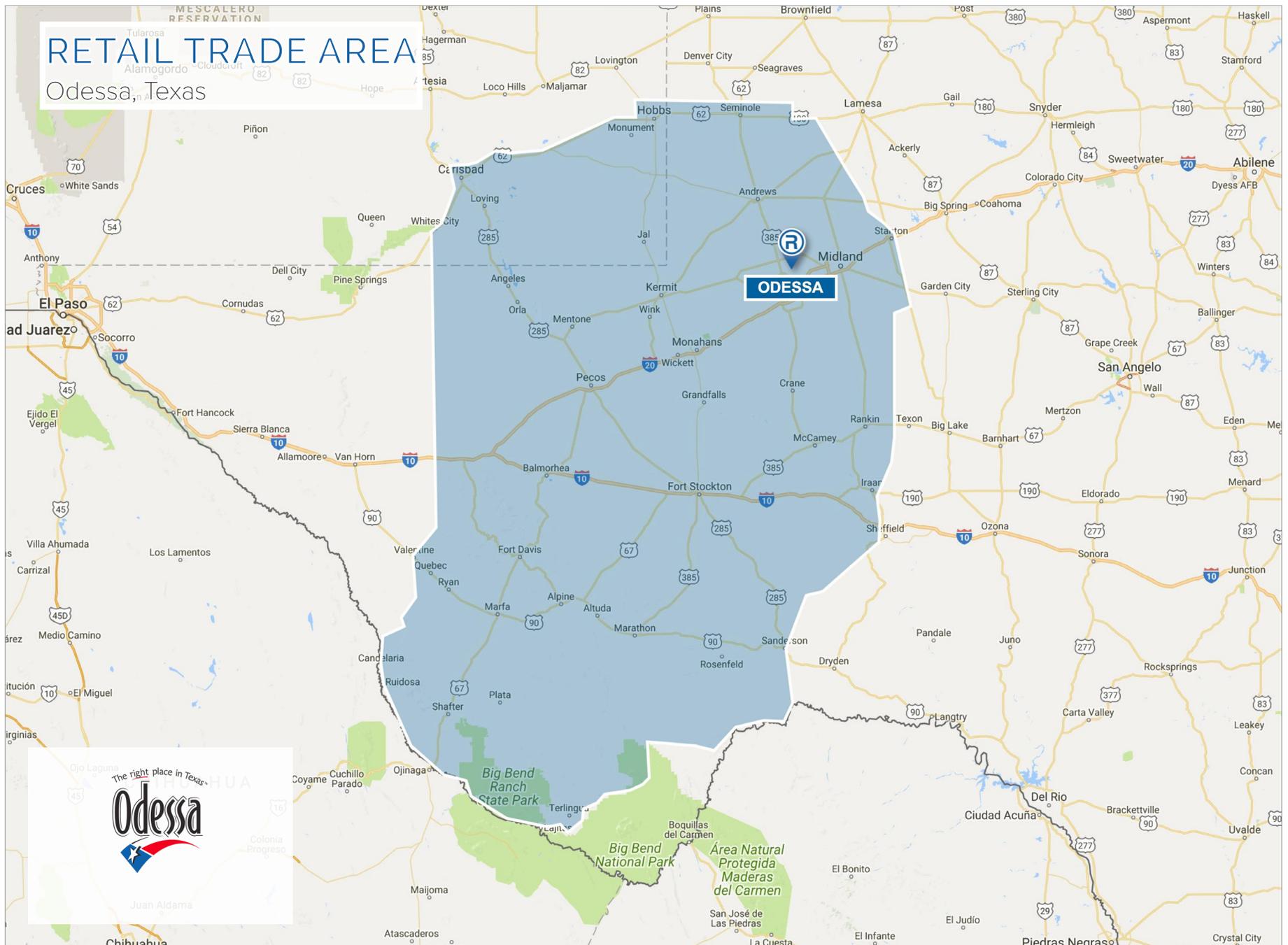
Odessa, Texas

Prepared for
City of Odessa
September 2018



RETAIL TRADE AREA

Odessa, 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?

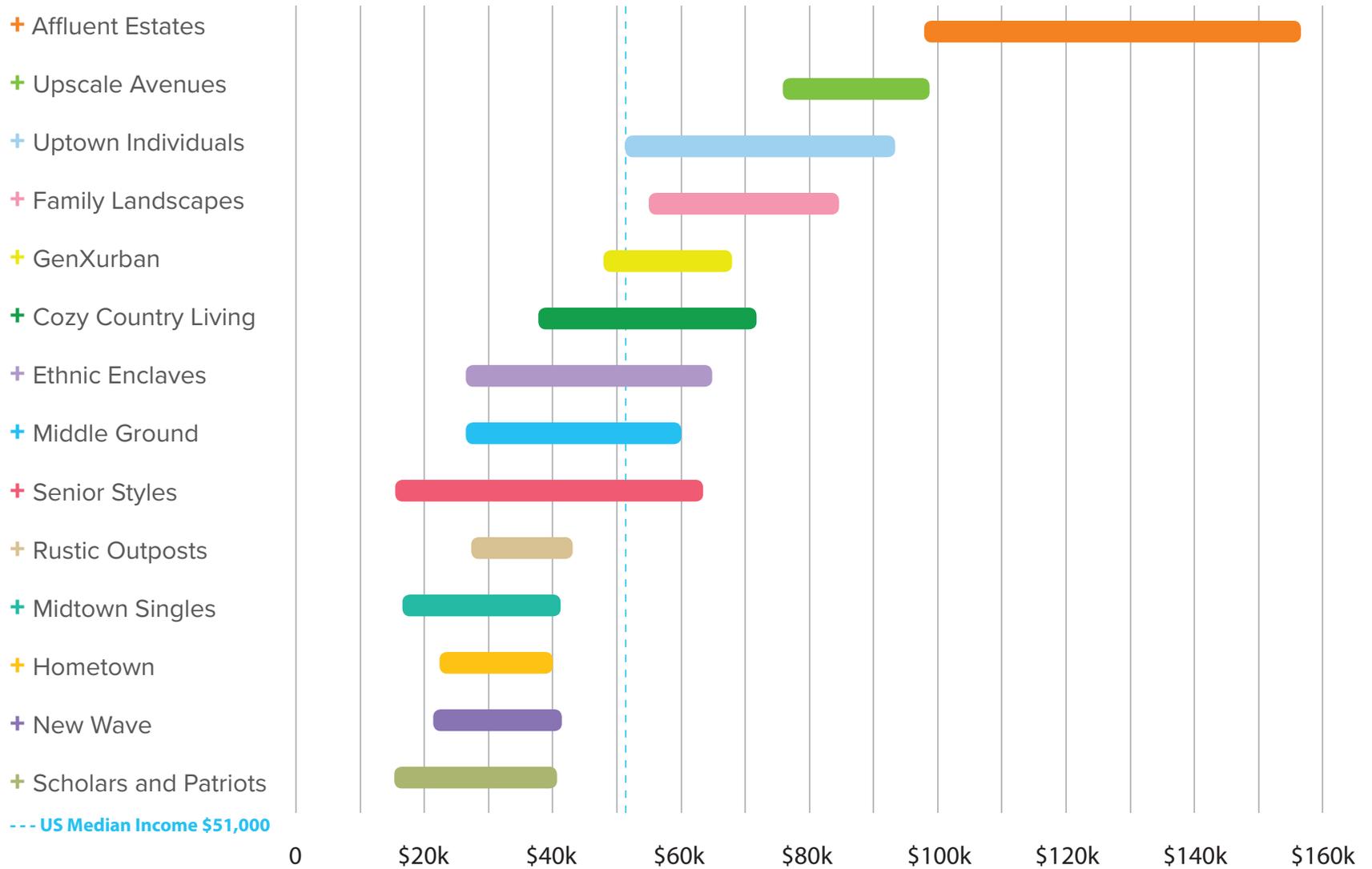
All companies, agencies, and organizations need to understand consumers/constituents in order to supply them with the right products and services and to reach them via their preferred media. These applications require a robust segmentation system that can accurately profile these diverse markets. The 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

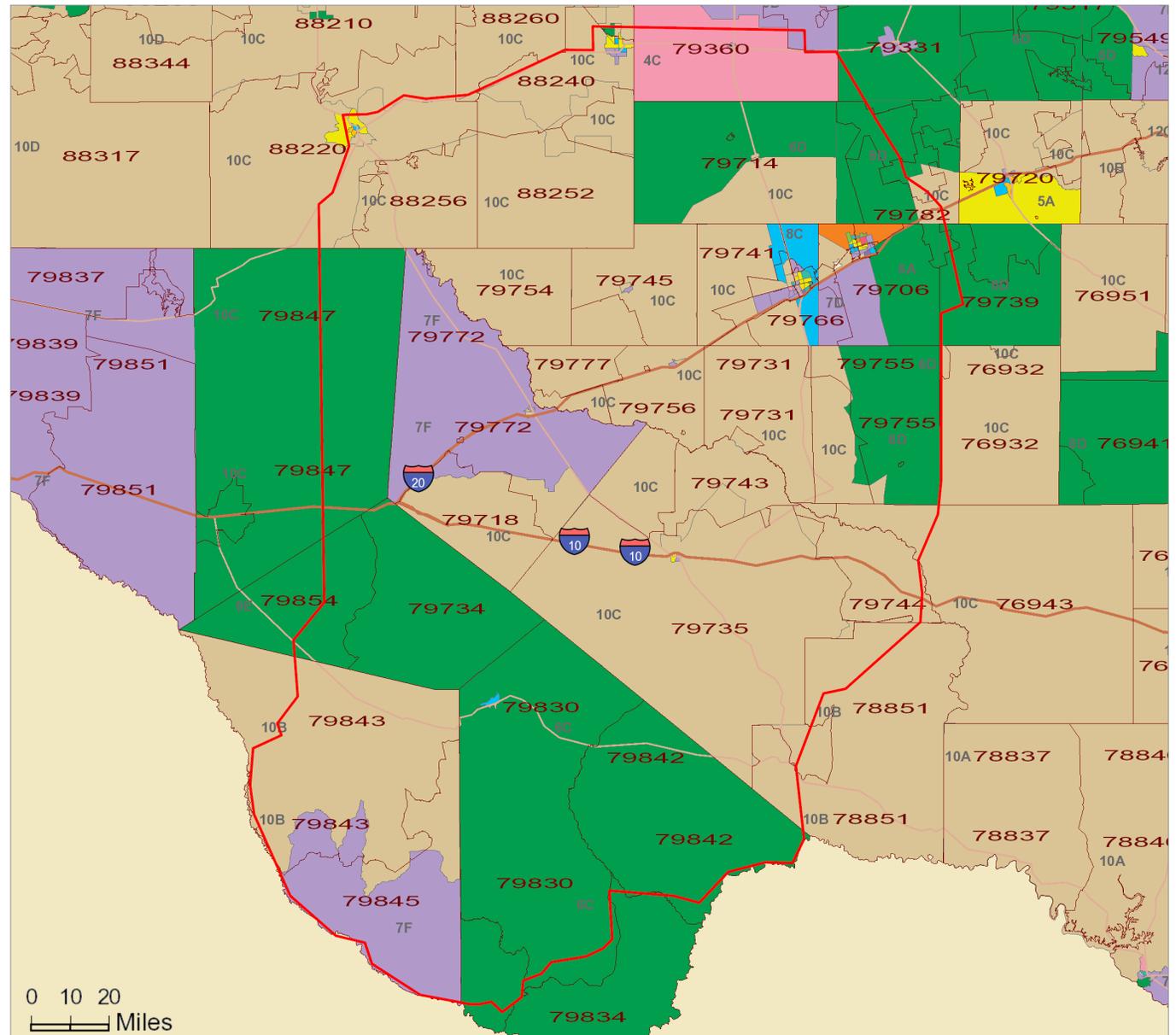
INCOME RANGE OF LIFEMODE SUMMARY GROUPS



RETAIL TRADE AREA • LIFEMODE SUMMARY GROUPS MAP

Odessa, 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



RETAIL TRADE AREA • TOP TAPESTRY SEGMENTS

Odessa, Texas



	TAPESTRY SEGMENTATION	HOUSEHOLDS PERCENT	CUMULATIVE PERCENT	US HOUSEHOLDS PERCENT	CUMULATIVE PERCENT	INDEX
1	Diners & Miners (10C)	12.0%	12.0%	0.7%	0.7%	1821
2	Barrios Urbanos (7D)	11.3%	23.3%	1.0%	1.7%	1,084
3	Southwestern Families (7F)	7.7%	31.0%	0.8%	2.5%	938
4	Down the Road (10D)	7.4%	38.4%	1.1%	3.6%	647
5	Rustbelt Traditions (5D)	5.7%	44.1%	2.2%	5.8%	258
	Subtotal	44.1%		5.8%		
6	In Style (5B)	5.0%	49.1%	2.2%	8.0%	224
7	Bright Young Professionals (8C)	4.9%	54.0%	2.2%	10.2%	218
8	Young and Restless (11B)	3.4%	57.4%	1.7%	11.9%	195
9	Green Acres (6A)	3.4%	60.8%	3.2%	15.1%	106
10	Old and Newcomers (8F)	3.3%	64.1%	2.3%	17.4%	143
	Subtotal	20.0%		11.6%		
11	Southern Satellites (10A)	3.1%	67.2%	3.1%	20.5%	98
12	Comfortable Empty Nesters (5A)	3.0%	70.2%	2.5%	23.0%	121
13	Middleburg (4C)	2.9%	73.1%	2.9%	25.9%	99
14	Traditional Living (12B)	2.5%	75.6%	1.9%	27.8%	127
15	Exurbanites (1E)	2.2%	77.8%	1.9%	29.7%	113
	Subtotal	13.7%		12.3%		
16	Professional Pride (1B)	1.9%	79.7%	1.6%	31.3%	117
17	American Dreamers (7C)	1.8%	81.5%	1.5%	32.8%	122
18	Small Town Simplicity (12C)	1.5%	83.0%	1.9%	34.7%	80
19	Prairie Living (6D)	1.5%	84.5%	1.1%	35.8%	138
20	Hardscrabble Road (8G)	1.4%	85.9%	1.2%	37.0%	116
	Subtotal	8.1%		7.3%		
	Total	85.7%		37.2%		231



LifeMode Group • Rustic Outposts

10C

DINERS AND MINERS

Close to one in five employed residents work in mining, oil and gas extraction, or quarrying industries.

Diners and Miners is a very rural, primarily Southern market. Married-couple families reside in over half of the households, and over a quarter of householders live in mobile homes. This socially conservative group earns a living working with their hands. In addition to mining, construction and agriculture are common industries for employment. They take pride in the appearance of their homes and their vehicles. Budget-minded residents enjoy home cooking, but nothing too fancy. This is a gregarious group that values time spent with friends.

US Household // 806,000

Average Household Size // 2.53

Median Age // 40.5

Median Household Income // \$37,000

+ OUR NEIGHBORHOOD

- Rural living; homes are sparsely located throughout the countryside.
- These families have roots in their communities and do not move often; over three-quarters of all households are owner occupied.
- Over half of owned homes are worth less than \$100,000.
- Married-couple families make up over half the households.
- Nearly a quarter of all housing units are mobile homes; the rest are primarily single-family dwellings.
- High-vacancy rate—nearly one in six housing units is vacant.



+ MARKET PROFILE

(Consumer preferences are estimated from data by GfK MRI)

- Own a domestic truck, dog, and ATV.
- Watch a lot of TV, including CMT and HSN.
- A few still hanging on to their landlines (no cell phones) and dial-up modems.
- Dine at Dairy Queen, KFC, Golden Corral, and Applebee's.
- Hunting, yard work, and gardening popular activities.
- Shop at department and discount stores—mostly Walmart.
- Many enrolled in Medicare and pick up prescriptions at the closest Walmart pharmacy.

+ SOCIOECONOMIC TRAITS

- They hold strong to religious beliefs.
- Most residents did not go to college.
- They are slow to adopt technology; “if it’s not broke, don’t fix it,” mentality.
- TV is the main source of information, news, and entertainment.
- They make purchases for today because tomorrow is uncertain.
- They are happy to go to work whenever the opportunity presents itself.
- Budgeted vacations are taken within the US, not abroad.

+ 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:

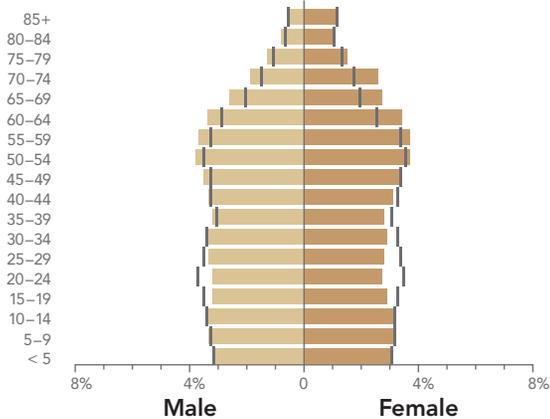
\$92,000
US Median: \$177,000



AGE BY SEX (Esri data)

Median Age: 40.5 US: 37.6

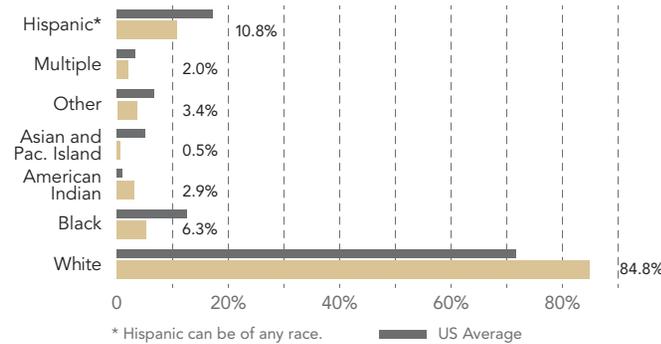
I Indicates US



RACE AND ETHNICITY (Esri data)

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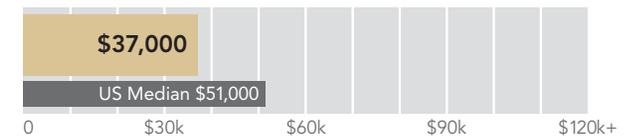
Diversity Index: 41.5 US: 62.1



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

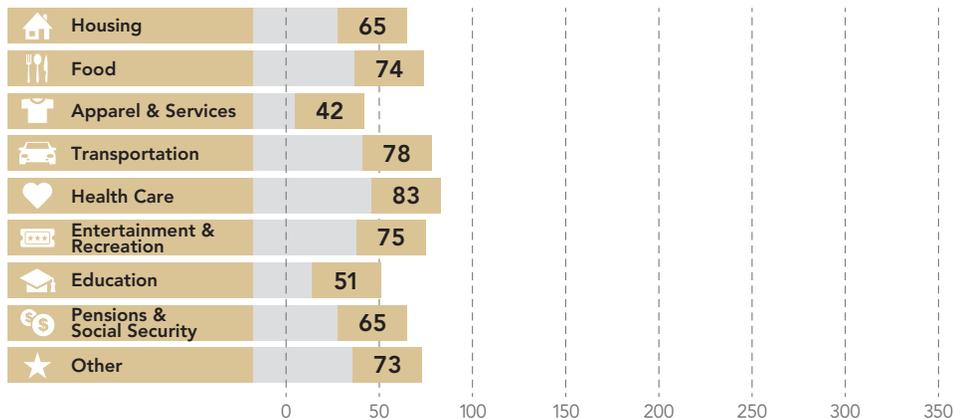


Median Net Worth



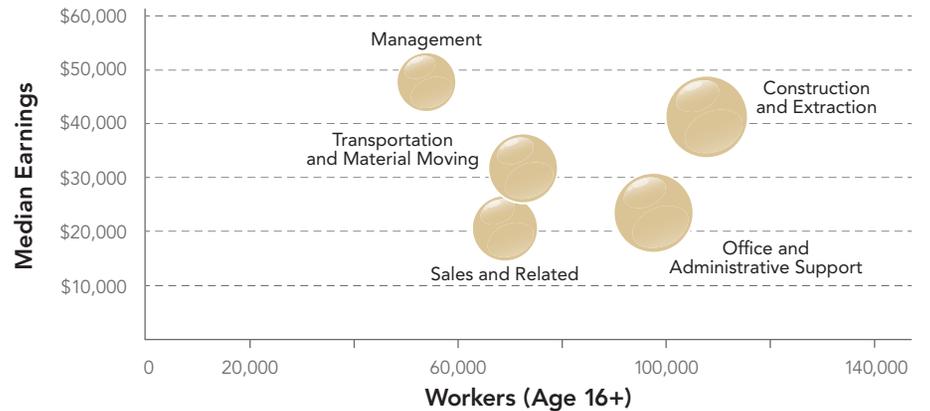
AVERAGE HOUSEHOLD BUDGET INDEX

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

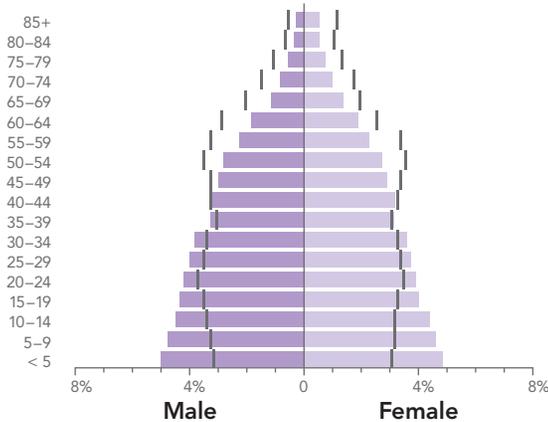
US Median \$177,000



AGE BY SEX (Esri data)

Median Age: 28.3 US: 37.6

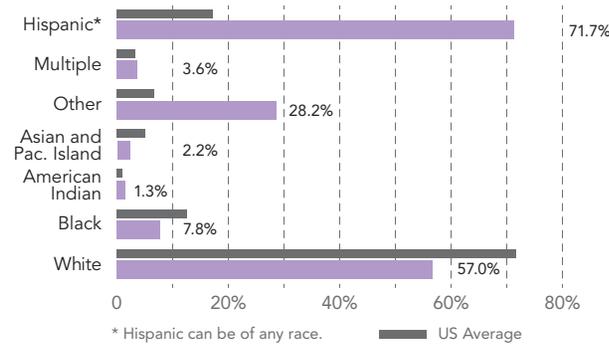
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RACE AND ETHNICITY (Esri data)

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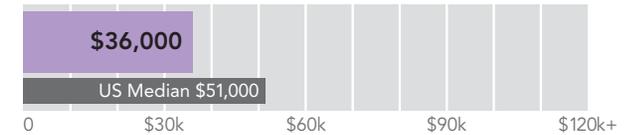
Diversity Index: 80.3 US: 62.1



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

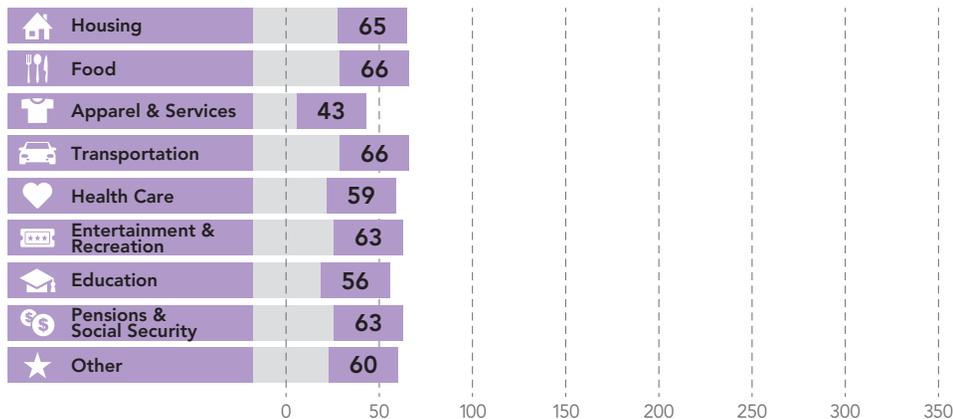


Median Net Worth



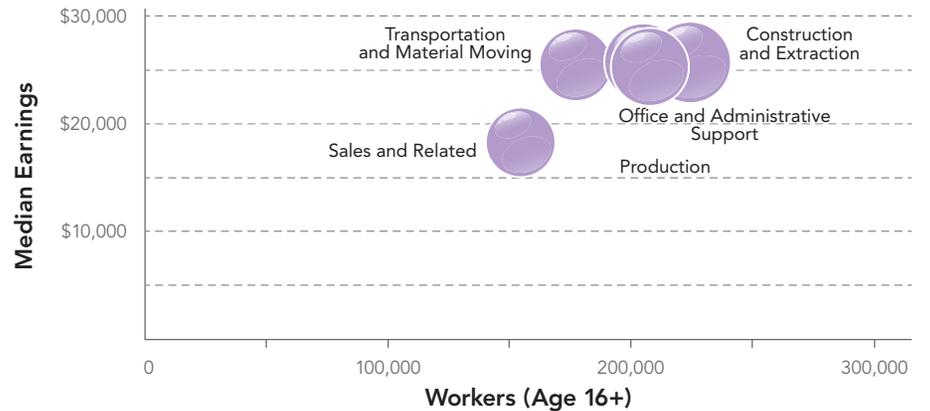
AVERAGE HOUSEHOLD BUDGET INDEX

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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 • 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

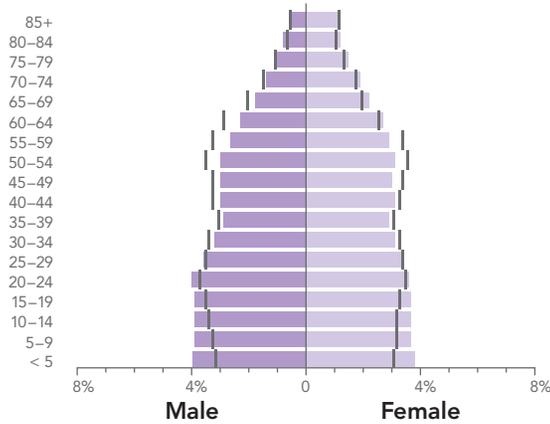
US Median: \$177,000



AGE BY SEX (Esri data)

Median Age: 33.8 US: 37.6

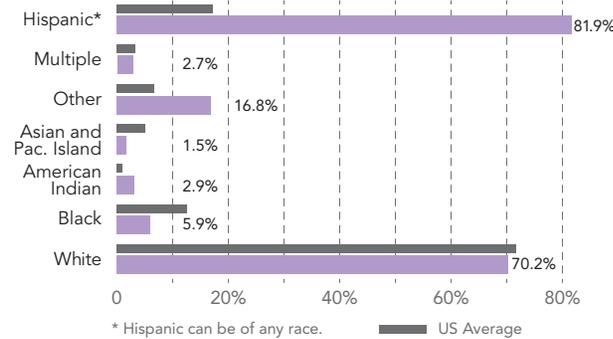
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RACE AND ETHNICITY (Esri data)

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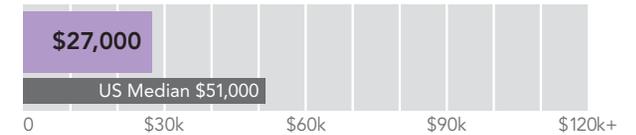
Diversity Index: 65.0 US: 62.1



INCOME AND NET WORTH

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Median Household Income

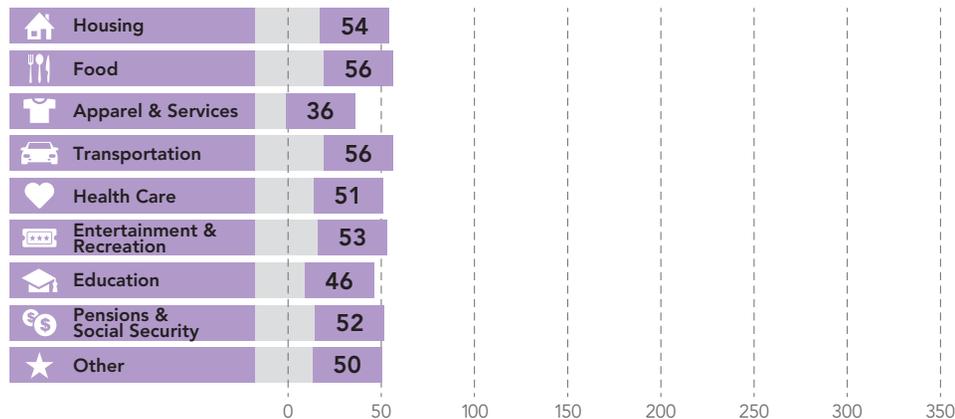


Median Net Worth



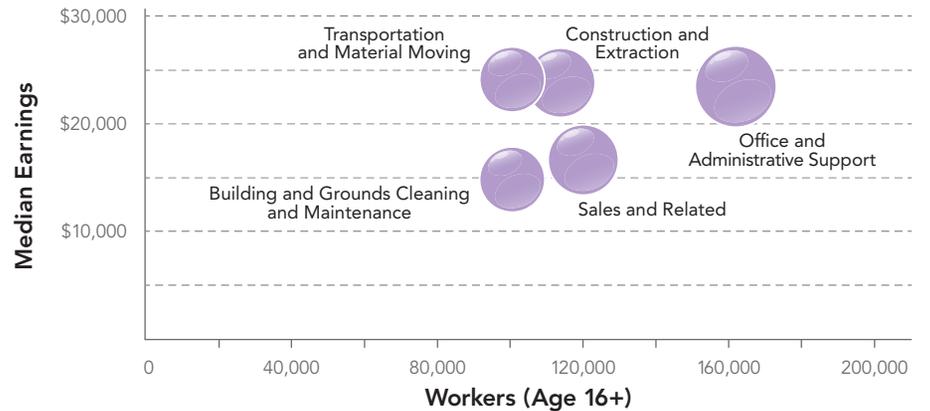
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OCCUPATION BY EARNINGS

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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

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Typical Housing:

Mobile Homes:
Single Family

Median Value:

\$104,000

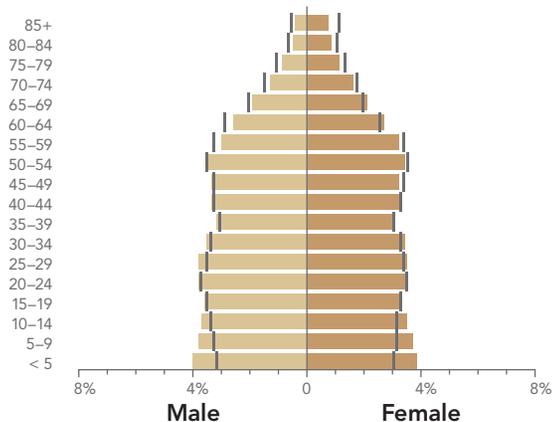
US Median: \$177,000



AGE BY SEX (Esri data)

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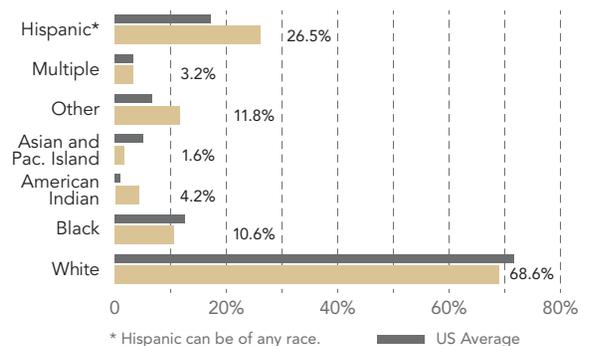
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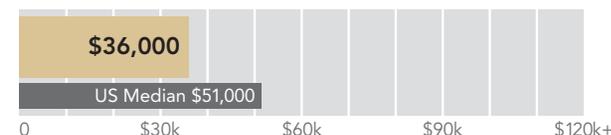
Diversity Index: 70.5 US: 62.1



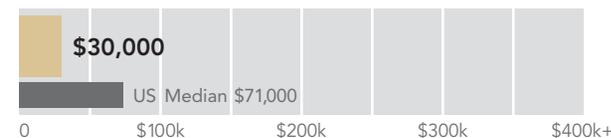
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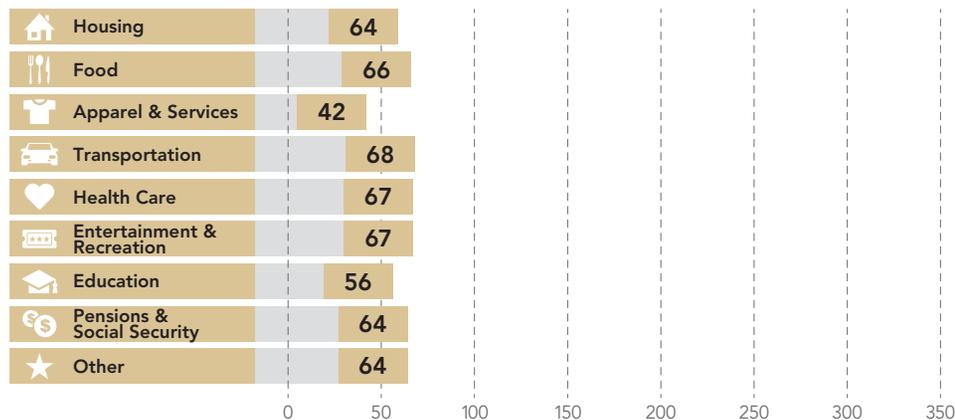


Median Net Worth



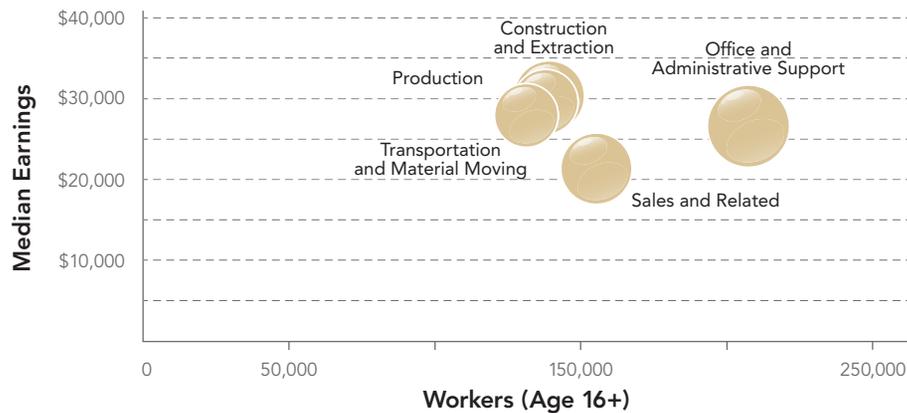
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OCCUPATION BY EARNINGS

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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.



+ 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

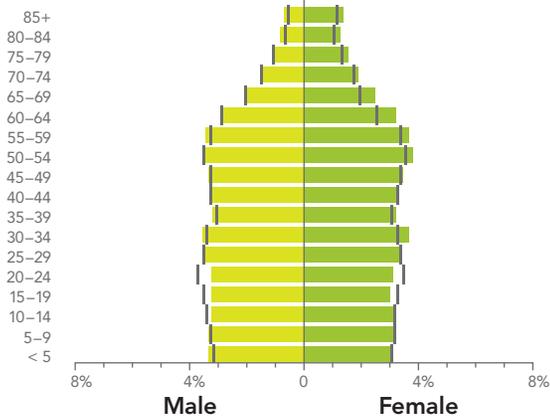
US Median \$177,000



AGE BY SEX (Esri data)

Median Age: 38.4 US: 37.6

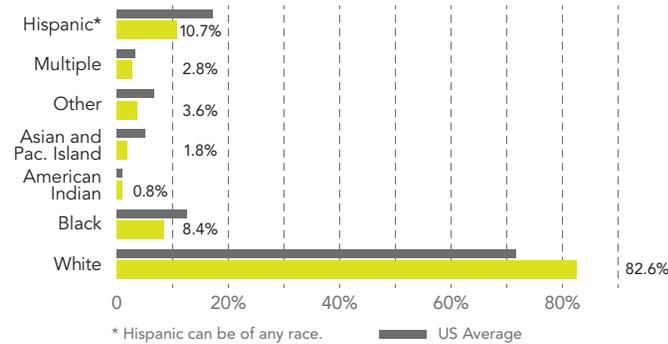
I Indicates US



RACE AND ETHNICITY (Esri data)

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: 44.2 US: 62.1



INCOME AND NET WORTH

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

Median Household Income

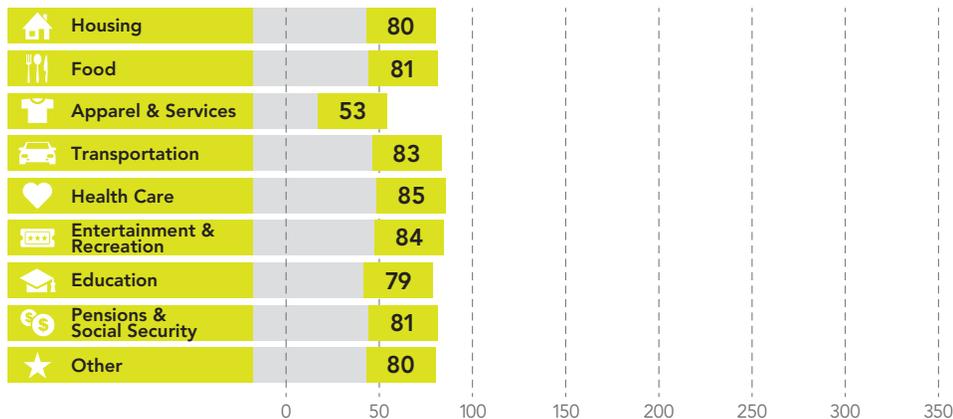


Median Net Worth



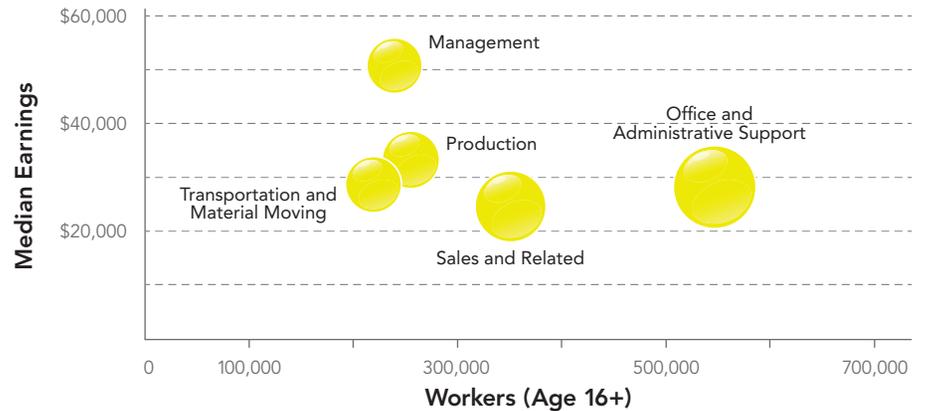
AVERAGE HOUSEHOLD BUDGET INDEX

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, Environics 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.