retail academy

Washington, Georgia

Retail Recruitment Plan

Your Research

Discover: Research

Memberships, Subscriptions & Customized Reports

Crittenden Research

RLT RETAIL LEASE TRAC

salesgenie

Nation's Restaurant News

PlainVanillaShell

SN SUPERMARKET NEWS

UberRetail

Research Partners & Geographic Information Systems

TETRAD

Sitewise

CCIM STDB

SitesUSA

REGIS online

Discover: Research

where does all this information come from?

here are a few of the demographic data sources used

Discover: Research

You have at your disposal thousands of variables from population and household incomes to spending patterns by retail category.

The information covered in this document represents the key highlights for your community.

The following are the highlights from a data and analytic perspective.

Demographic Overview

Cell Phone Tracking Data

Customized Trade Area Analysis

Lifestyle Segmentation

Retail Gap Analysis

Peer Analysis

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Residential Population Density

- 1 dot = 100

Daytime Employee Population Density

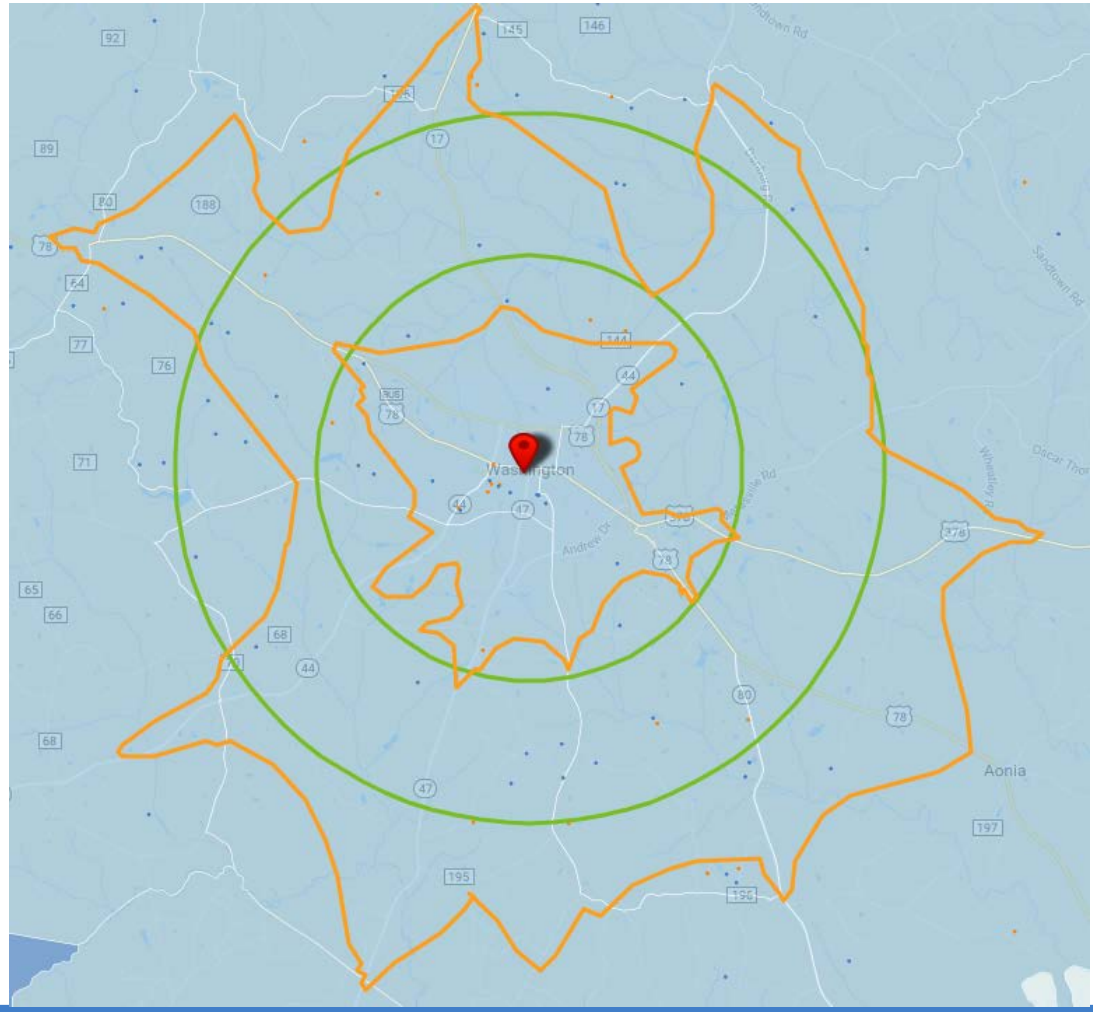
- 1 dot = 100

Median Household Income

- $0-$25,000
- $25,000-$50,000
- $50,000-$75,000
- $75,000-$100,000
- $100,000-$150,000
- > $150,000

Study Area

- 3.00 mi
- 5.00 mi
- 0-5 min
- 0-10 min



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Category	3-Mile Radius	5-Mile Radius	10-Mile Radius	5-Minute Drive Time	10-Minute Drive Time	15-Minute Drive Time
Current Year Estimated Population	4,429	5,483	8,496	2,811	5,774	7,882
Number of Households	1,828	2,174	3,425	1,206	2,303	3,168
Projected Annual Growth (5 YR)	-0.72%	-0.70%	-0.77%	-0.50%	-0.72%	-0.74%
Median HH Income 2016	$32,840	$33,262	$34,476	$34,817	$33,598	$34,499
Current Year Average Age	41.2	41.1	42	42.5	41.3	42
Average Home Value	$168,802	$168,785	$166,606	$180,627	$170,313	$167,993
Current Year % Bachelor's Degree	16%	15%	13%	19%	15%	14%
Daytime Population	6,641	7,549	9,213	5,244	7,901	9,090
Labor Force	1,837	2,283	3,568	1,207	2,410	3,306

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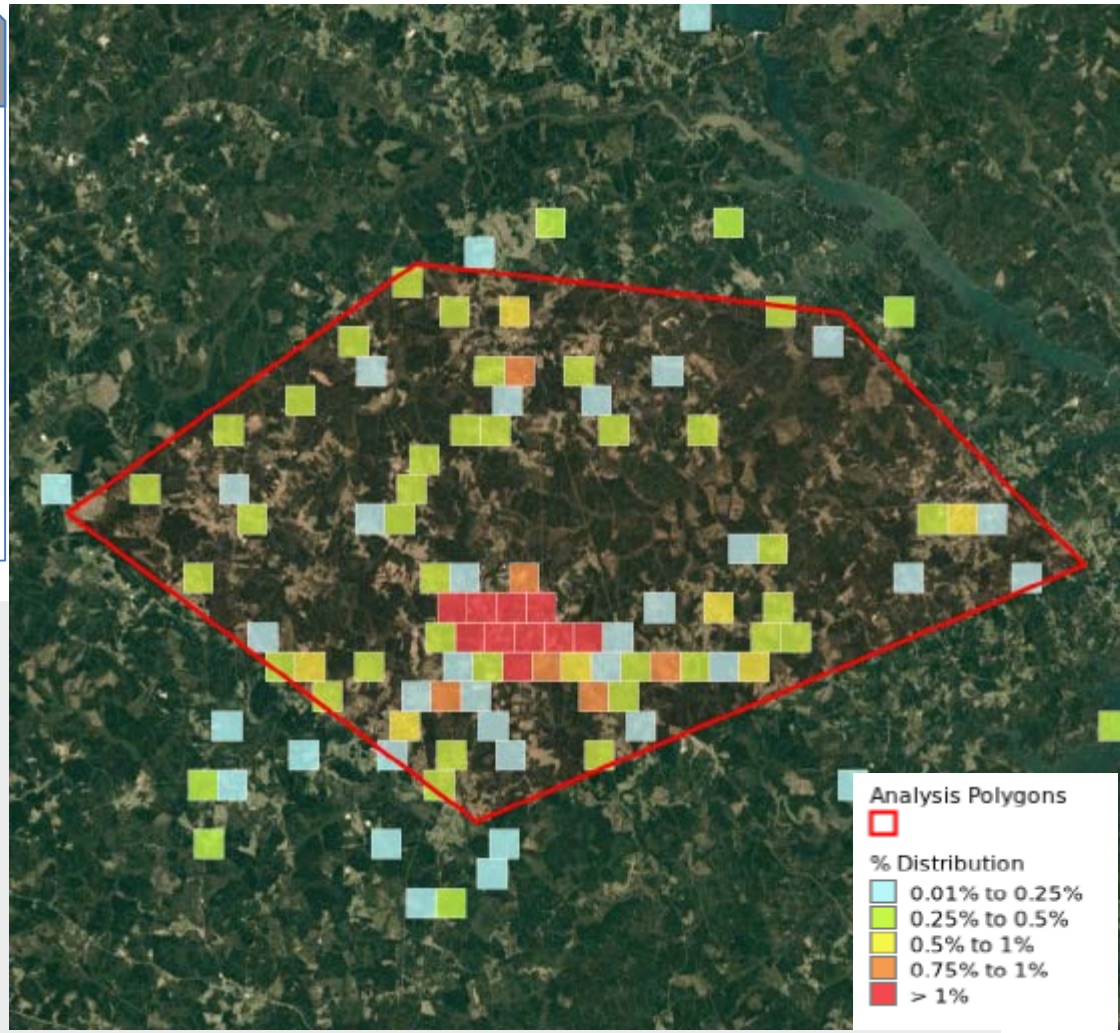
Mobile Data Collection

The Service uses data collected from mobile phone users who have agreed within their apps and phone settings to enable location information. The Service includes mobile phone data with latitude/longitude points that are accurate to approximately 20 feet. Data inputs are updated as quickly as every 24-hours. The data shown includes shopper who visited the defined location during the designated time period.

The location tracked was
INGLES MARKET
for the time period of
OCTOBER 1, 2016-
OCTOBER 1, 2017

This tool is intended to support the trade area but does not solely define the trade area.



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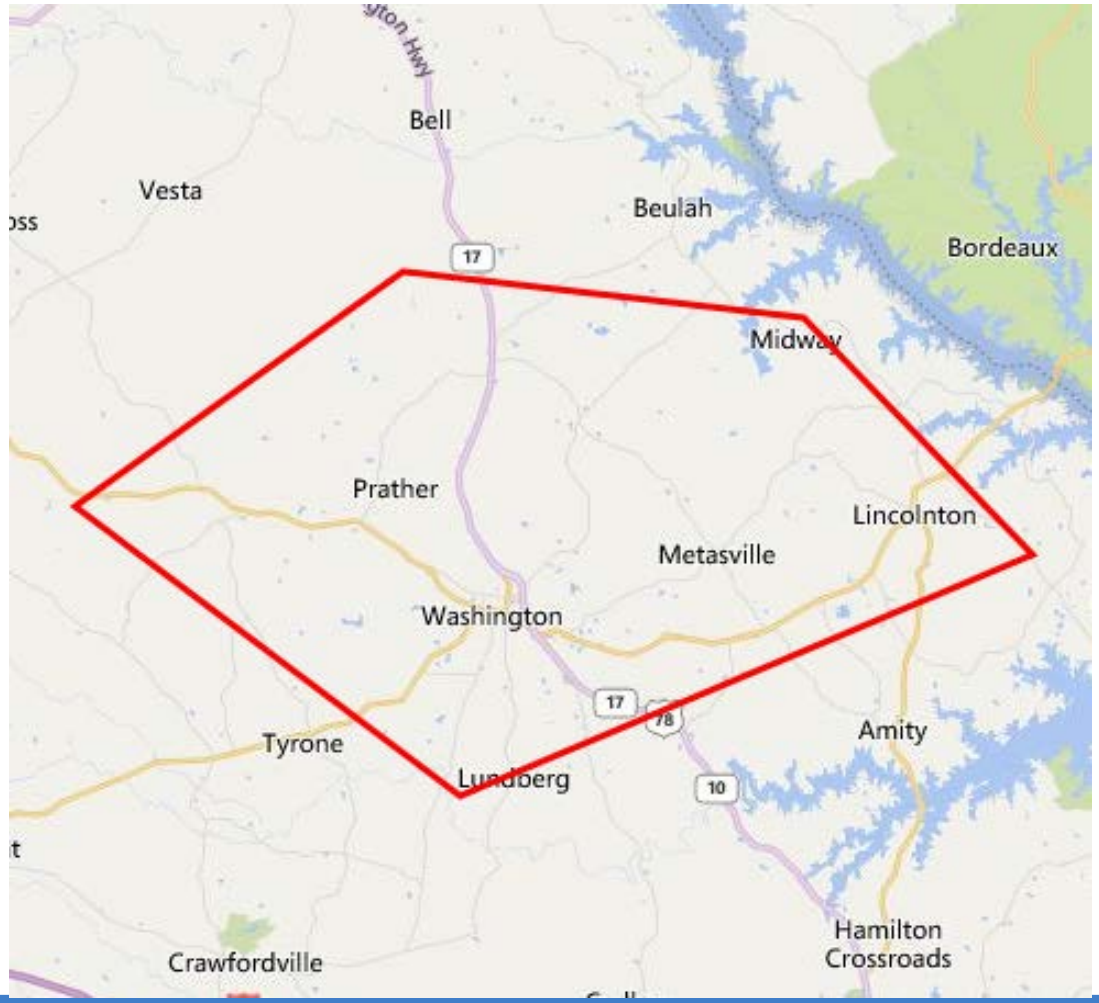
Customized Trade Area

Each retailer has a specific set of site selection criteria they use to determine if they will have a profitable store. Municipal boundaries, radius rings and drive times area is a start.

A customized trade area is the next step to analyzing a market. A trade area defines a core customer base of consumers highly likely to shop and eat in the market at least once a month.

Your trade area has been created by combining a series of drive times, mobile data analysis, geographic boundaries and proximity to neighboring shopping destinations.

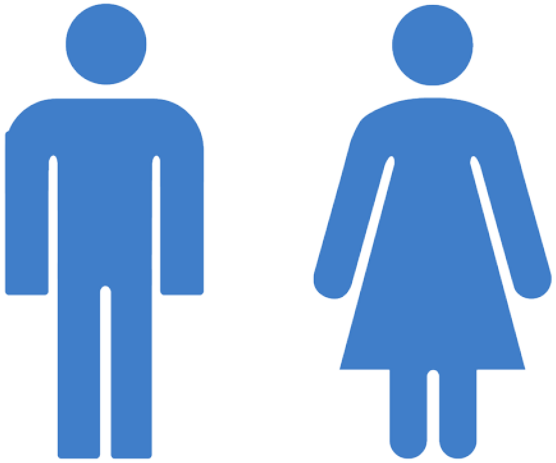
Each retailer will analyze their own trade area based on their existing stores, their competition and site selection criteria.



Discover

12,308
2017 estimated population

12,138
projected 2022 population

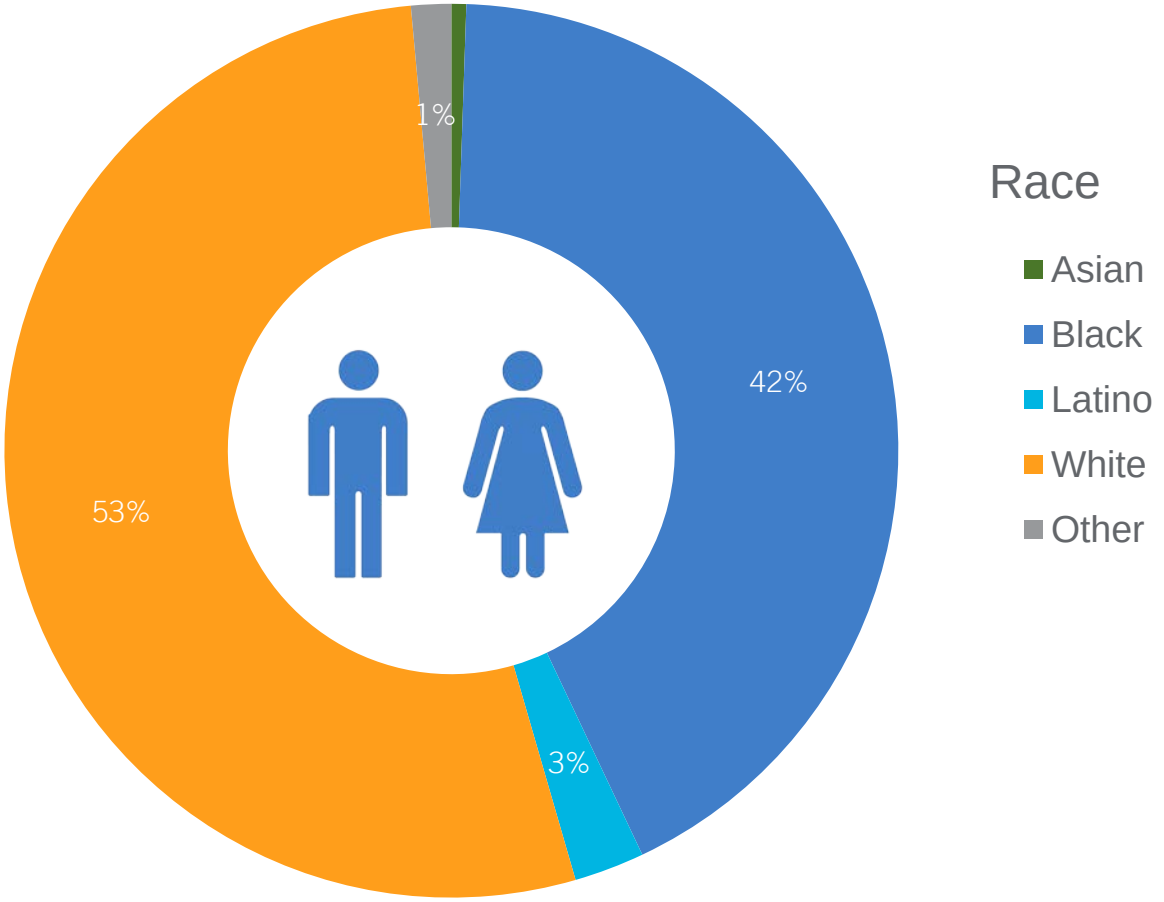


-1.4%
projected growth rate
2017-2022

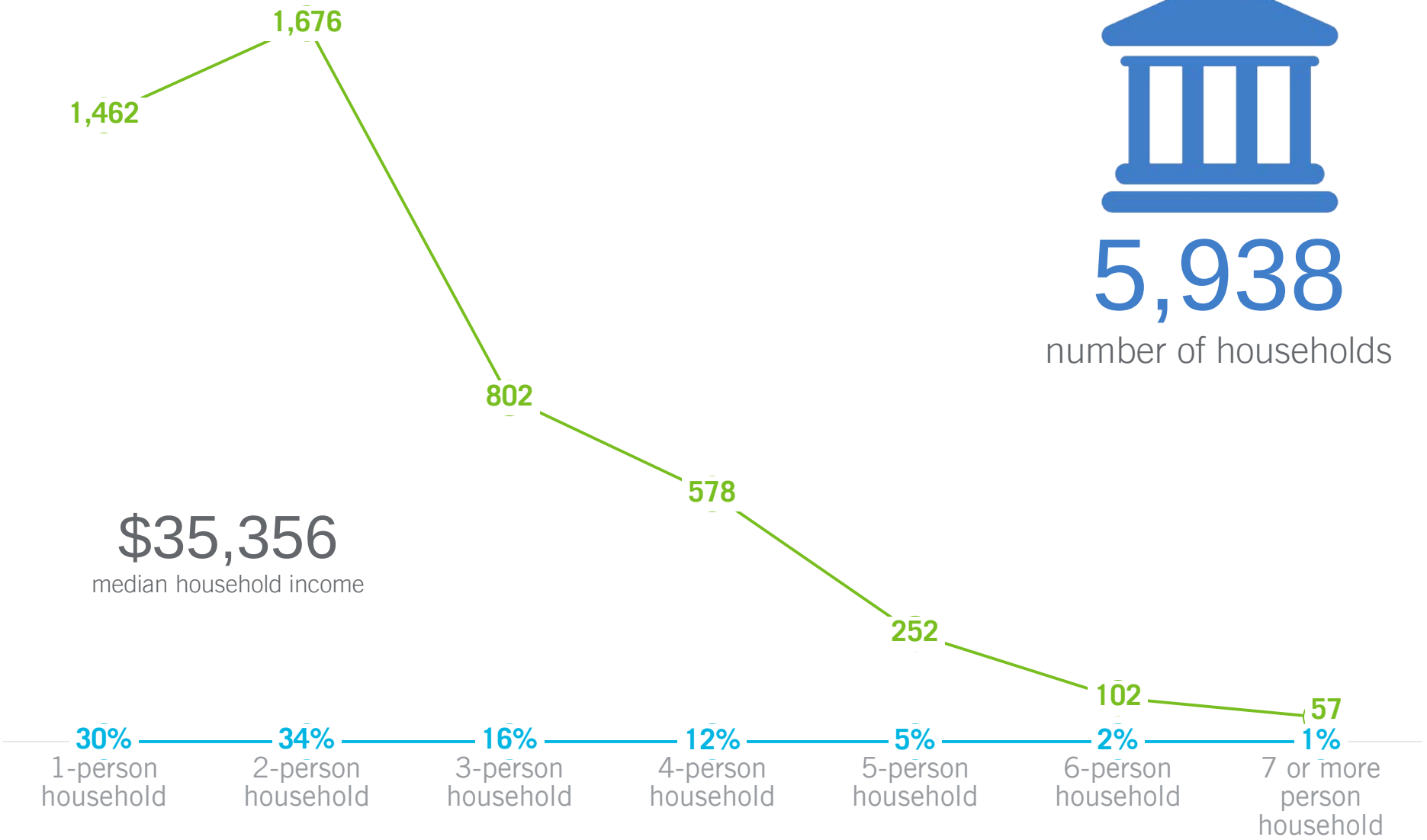
40
male average age

43
female average age

Discover



Discover

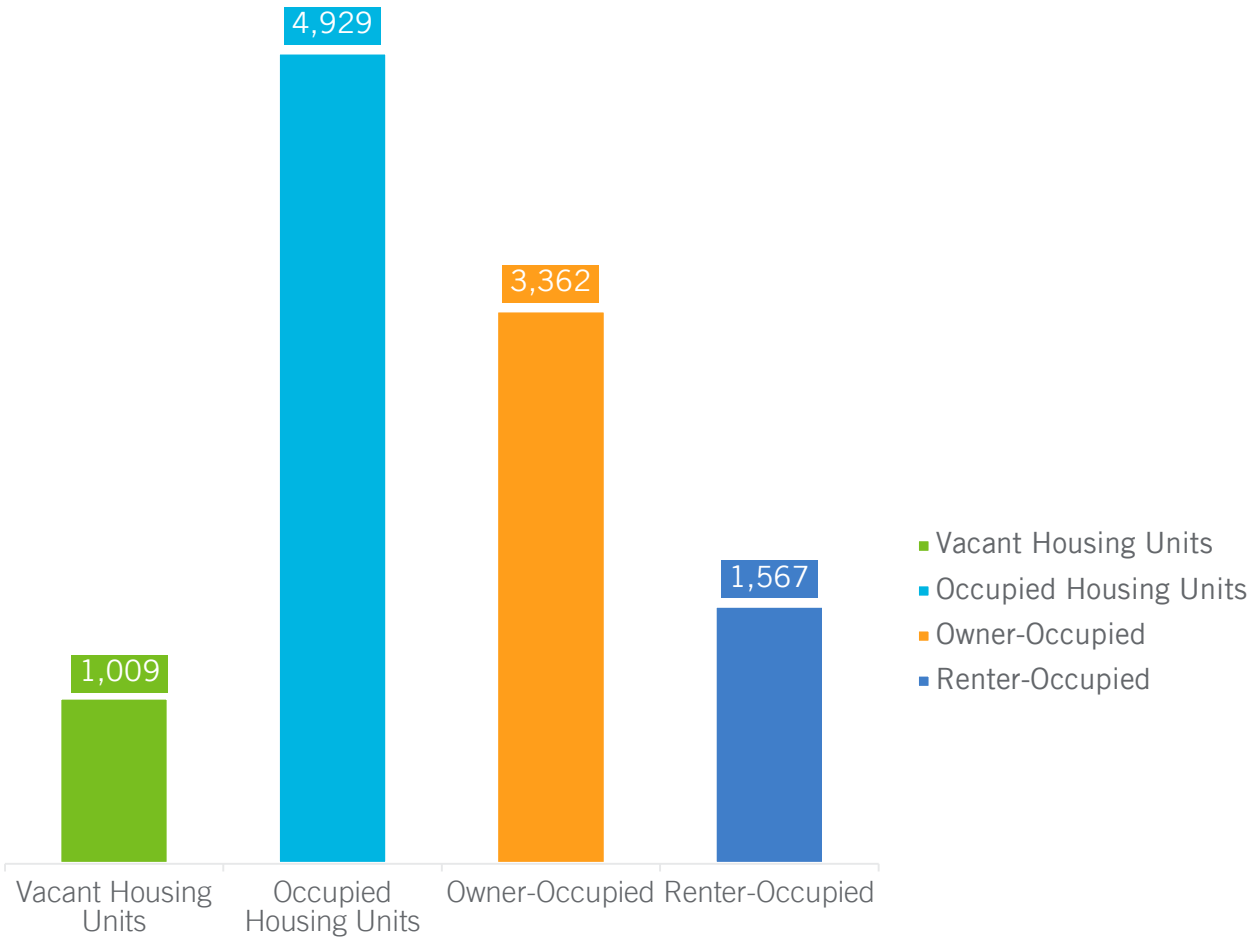


5,938
number of households

$35,356
median household income

Discover

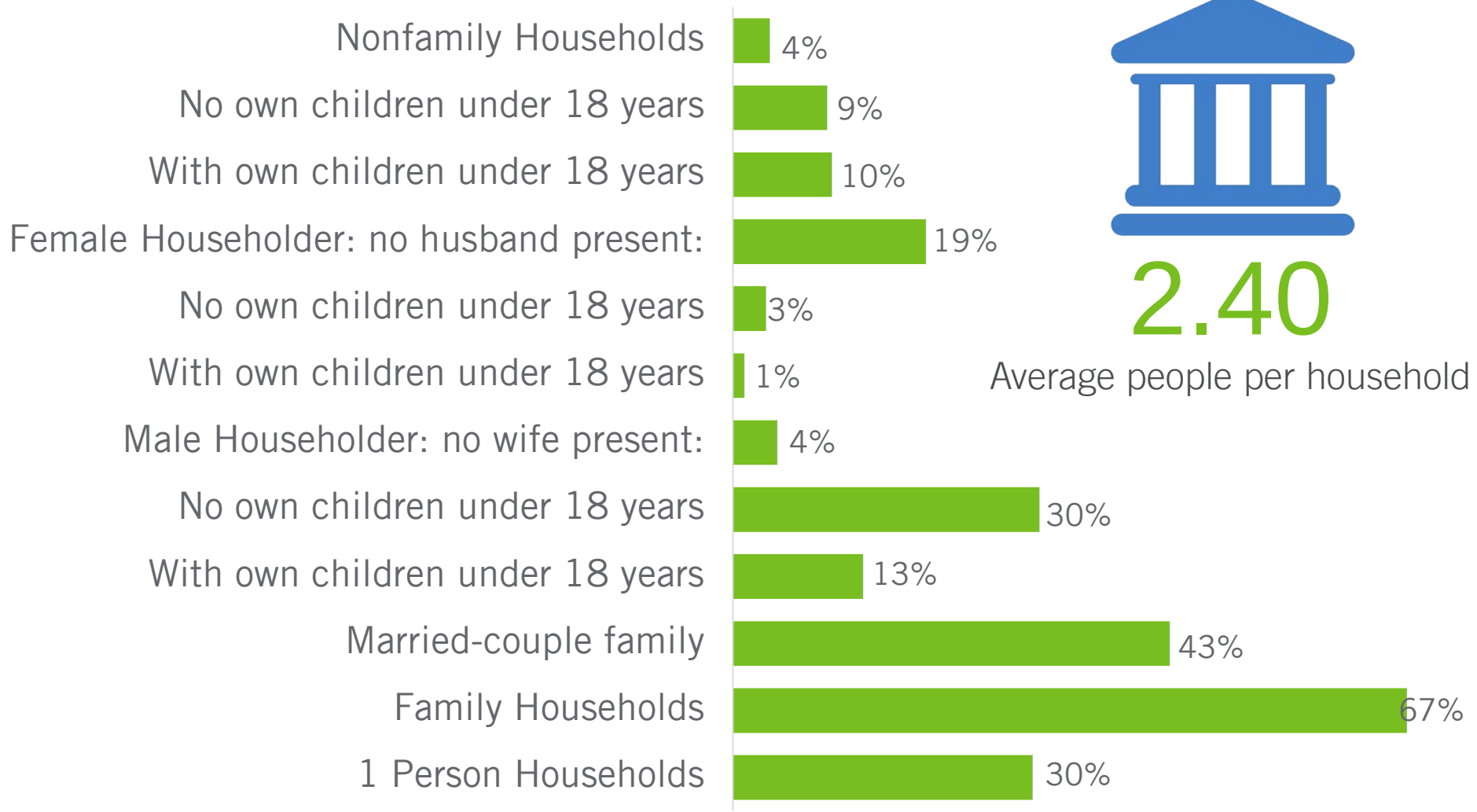
2017 ESTIMATED HOUSING UNITS BY TENURE



$163,216

average housing unit value

Discover



2.40

Average people per household

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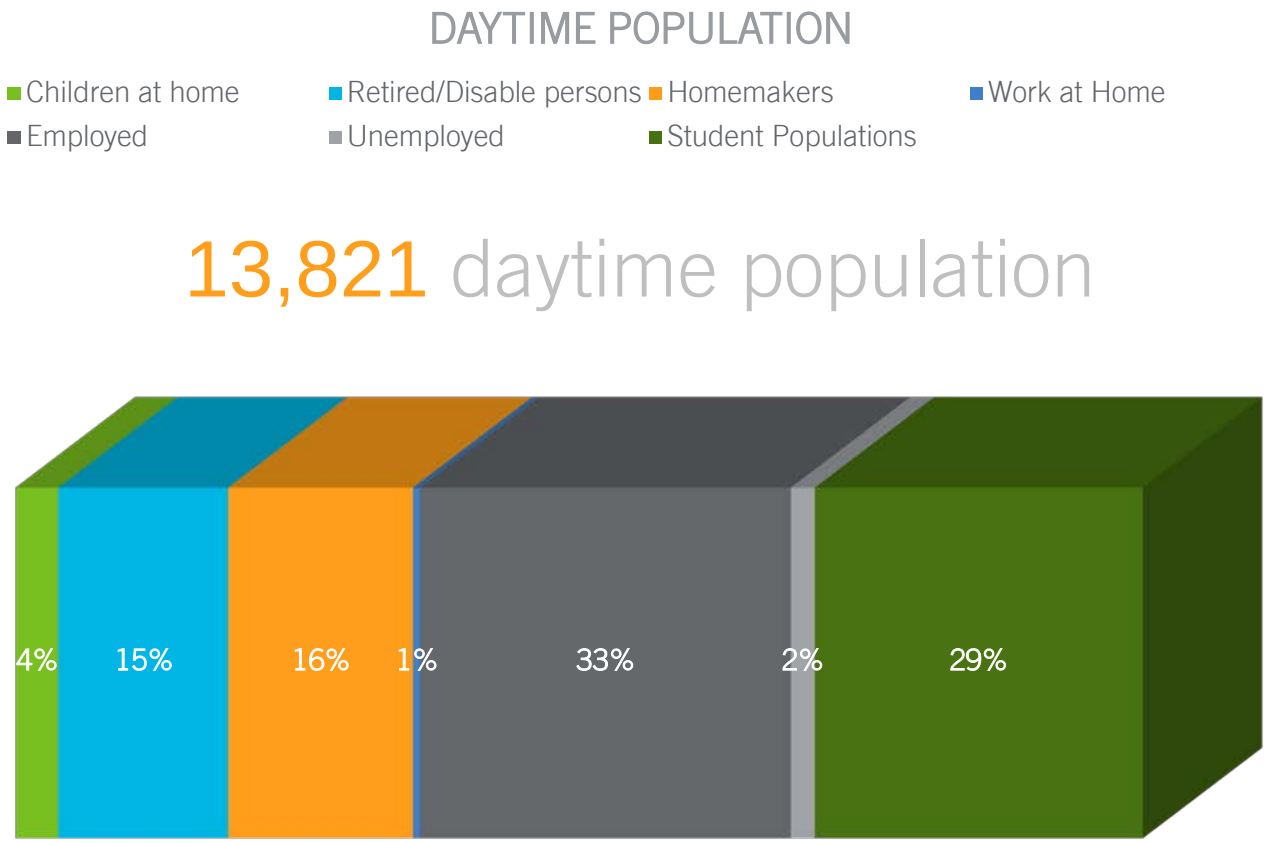
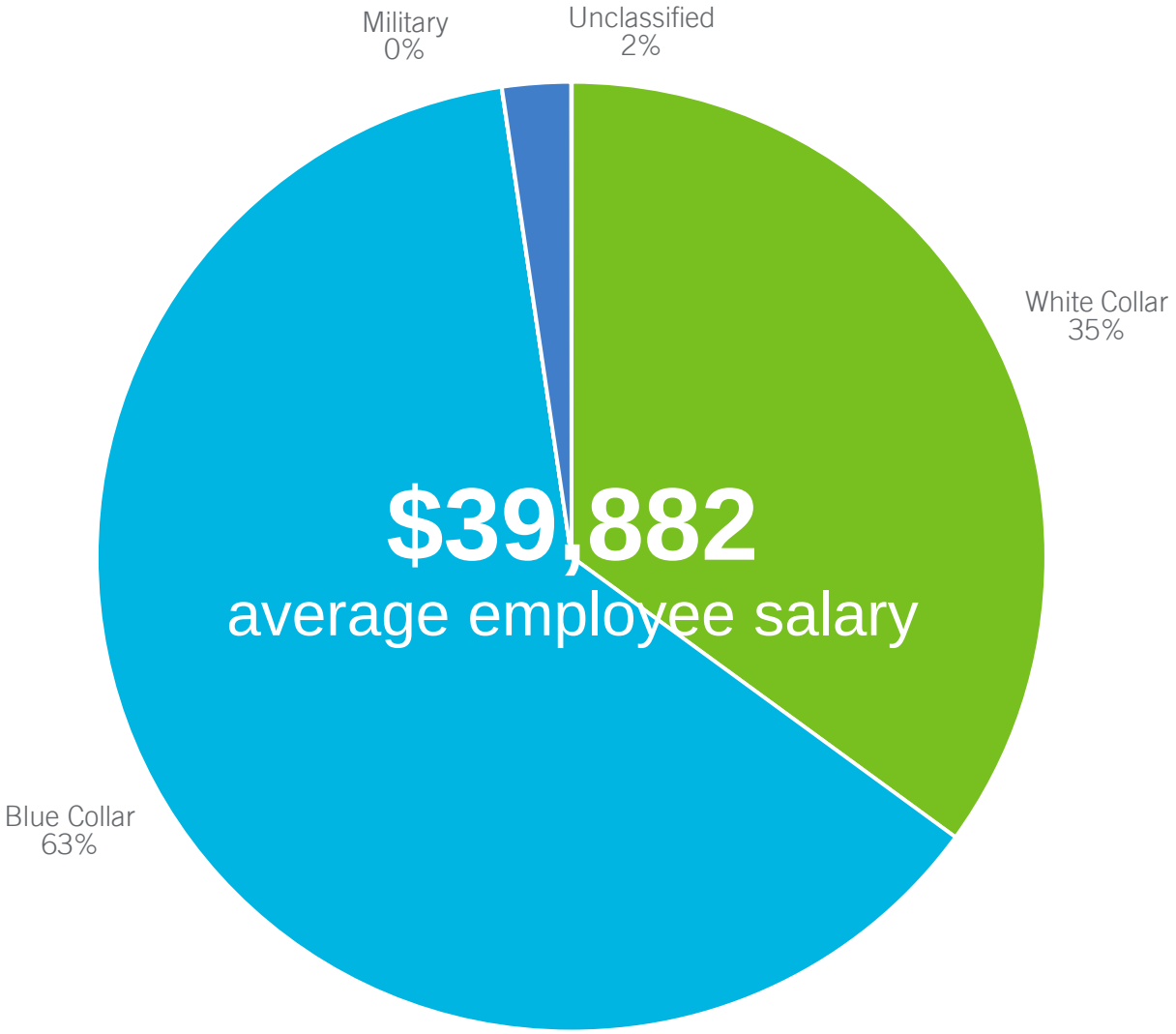
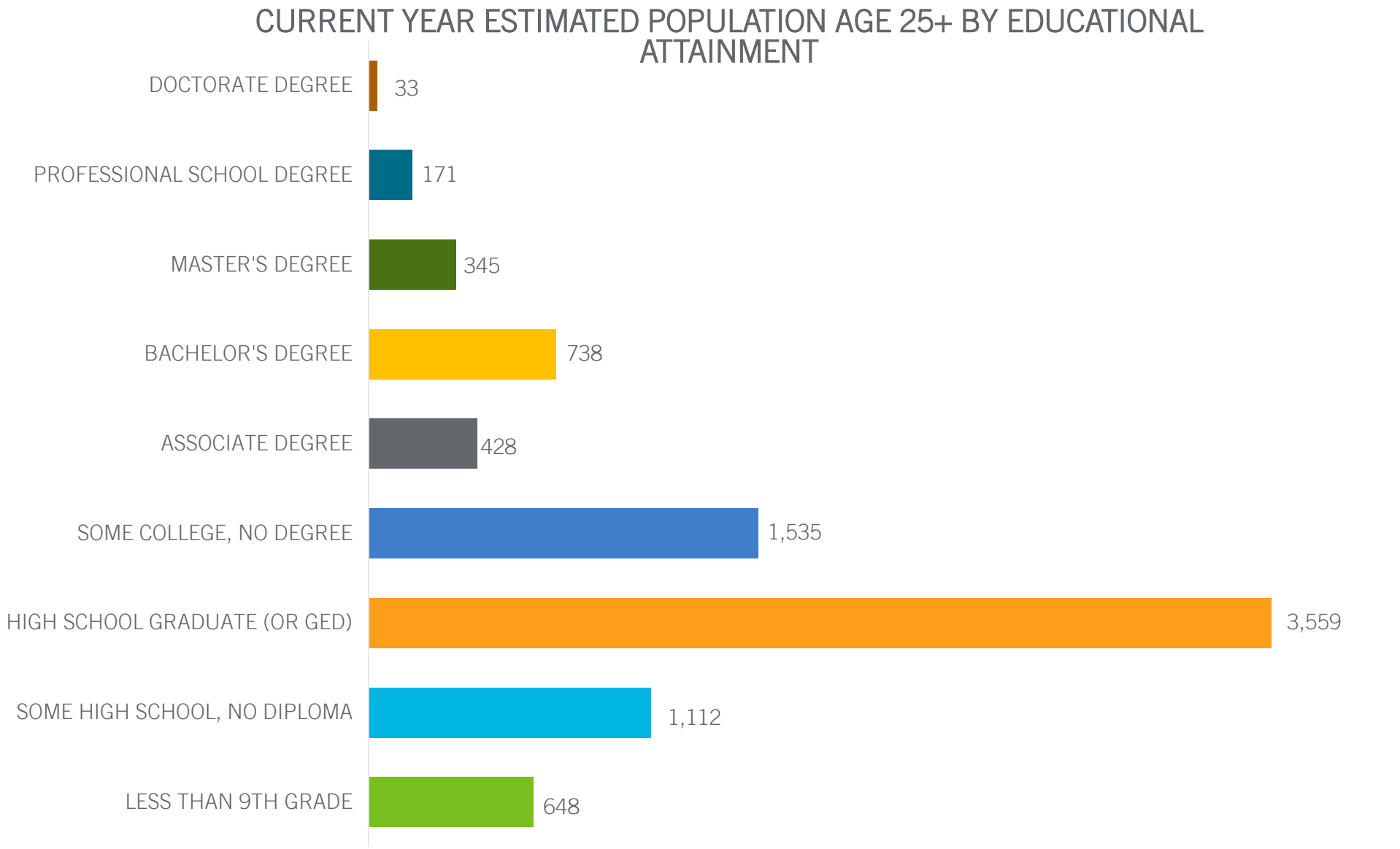

DAYTIME POPULATION
Children at home
Retired/Disable persons
Homemakers
Work at Home
Employed
Unemployed
Student Populations
13,821 daytime population
4%
15%
16%
1%
33%
2%
29%

Discover

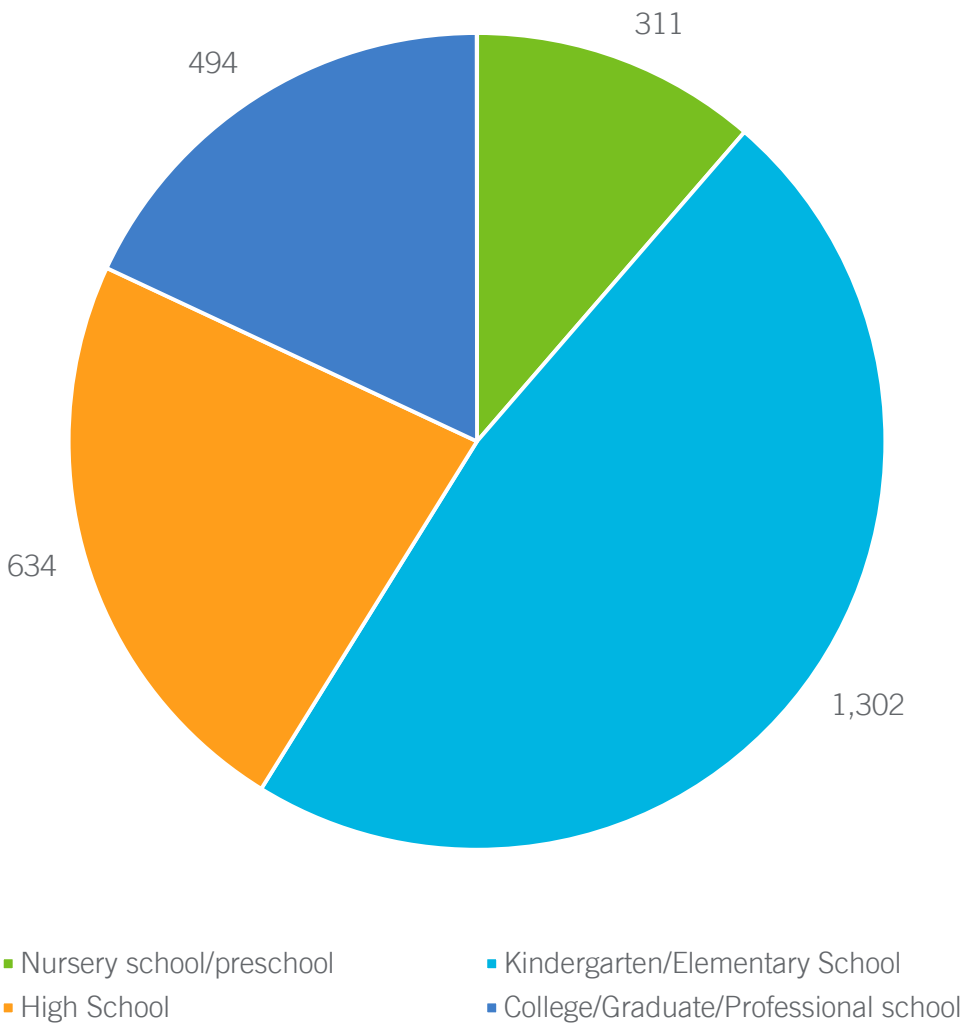

Military
0%
Unclassified
2%
White Collar
35%
Blue Collar
63%
$39,882
average employee salary

Discover


CURRENT YEAR ESTIMATED POPULATION AGE 25+ BY EDUCATIONAL ATTAINMENT
DOCTORATE DEGREE
33
PROFESSIONAL SCHOOL DEGREE
171
MASTER'S DEGREE
345
BACHELOR'S DEGREE
738
ASSOCIATE DEGREE
428
SOME COLLEGE, NO DEGREE
1,535
HIGH SCHOOL GRADUATE (OR GED)
3,559
SOME HIGH SCHOOL, NO DIPLOMA
1,112
LESS THAN 9TH GRADE
648

Discover

CURRENT YEAR ESTIMATED POPULATION BY ENROLLMENT



Discover: Research & Analytics

Lifestyle Reports allow BIG DATA to be summed up into a simple narrative on the personality of the majority of your households.

When asked to describe “Who is Washington, GA?”, often times the community leadership describes themselves rather than the dominate personality of the area. Understanding consumer shopping patterns based on personality allow Retail strategies to better align the retail prospects with the purchasing patterns.

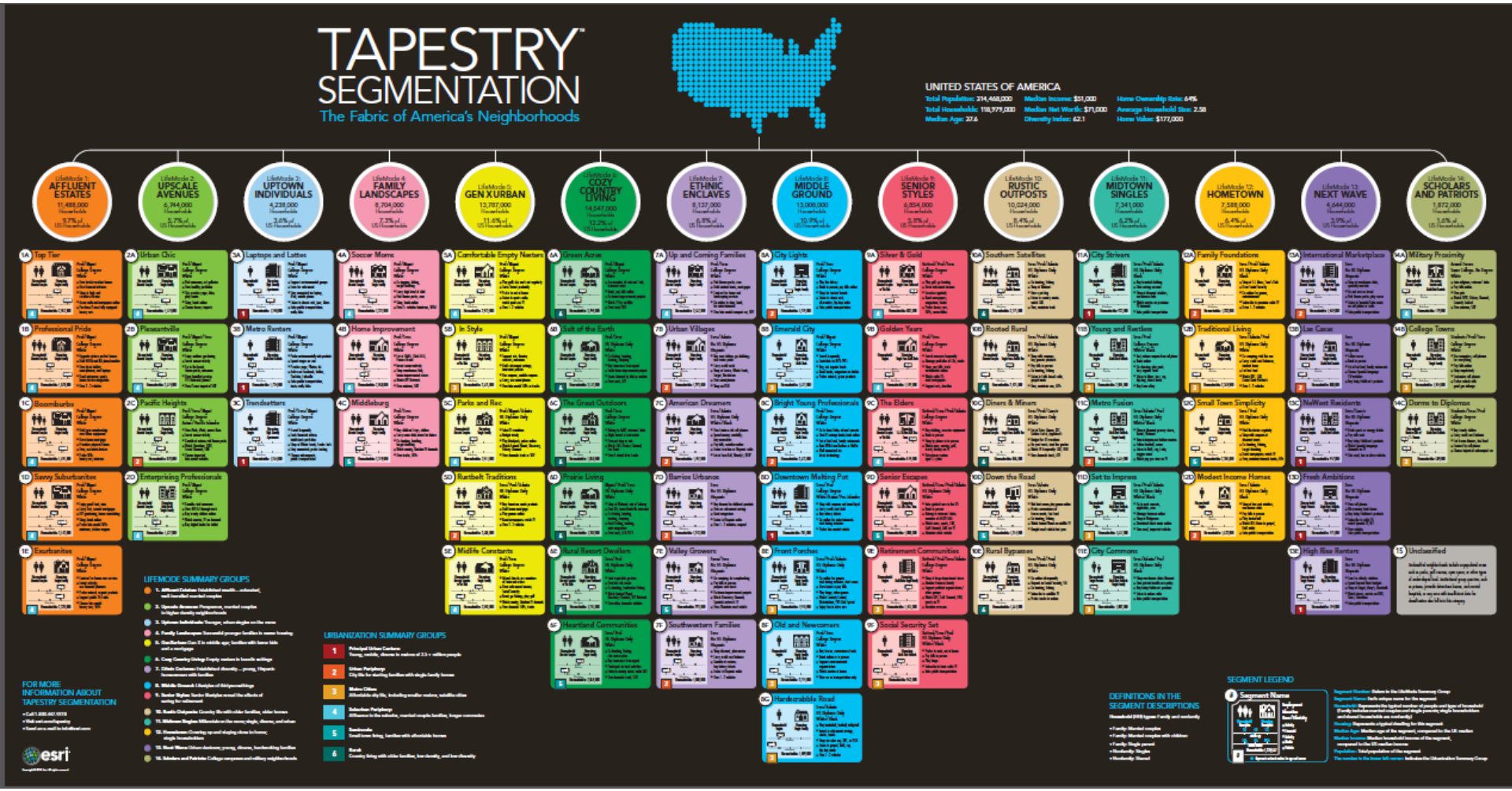
Selection of the variables used to identify consumer markets begins with data that includes household characteristics such as single person or family, income, relationships (married or multigenerational), and tenure; personal traits such as age, sex, education, employment, and marital status; and housing characteristics like home value or rent, type of housing (single family, apartment, town house, or mobile home), seasonal status, and owner costs relative to income. In essence, any characteristic that is likely to differentiate consumer spending and preferences is assessed for use in identifying consumer markets.

ESRI Tapestry Segmentation

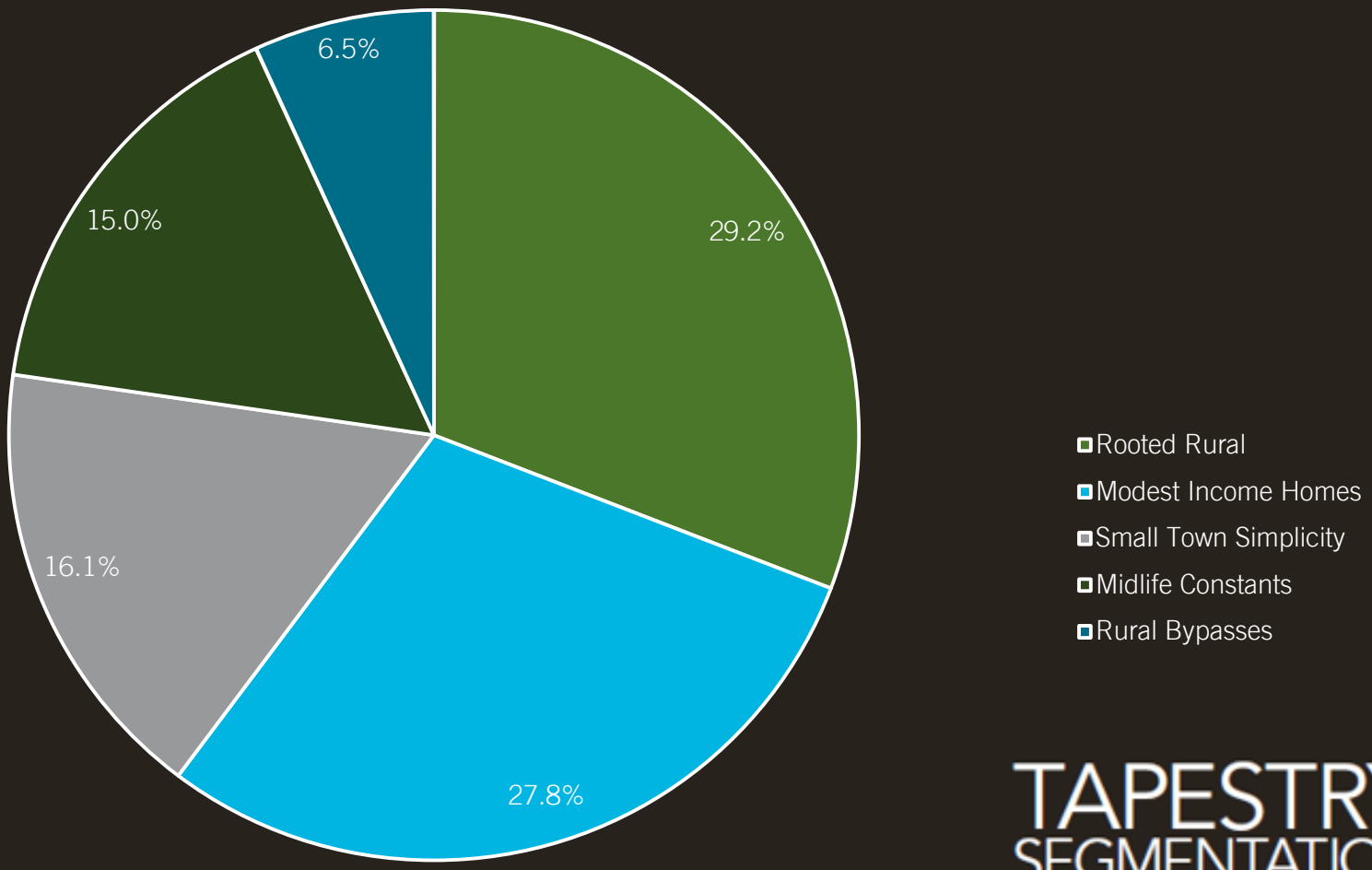
is a geodemographic segmentation system that integrates consumer traits with residential characteristics to identify markets and classify US neighborhoods. Neighborhoods with the most similar characteristics are grouped together, while neighborhoods with divergent characteristics are separated. Internally homogenous, externally heterogeneous market segments depict consumers' lifestyles and life stages. Tapestry Segmentation combines the "who" of lifestyle demography with the "where" of local geography to create a classification model with 67 distinct, behavioral market segments.

***Tapestry Segmentations available in Appendix A**

Discover: Research & Analytics



Discover: Research & Analytics



TAPESTRY SEGMENTATION
The Fabric of America's Neighborhoods

Understanding the GAP Analysis:

The GAP Analysis helps us uncover the number of dollars being spent outside of the community on an annual basis from a categorical perspective.

The difference between demand and supply represents the opportunity gap or surplus available for each merchandise line in the specified reporting geography. When the demand is greater than (less than) the supply, there is an opportunity gap (surplus)for that merchandise line. For example, a positive value signifies an opportunity gap, while a negative value signifies a surplus.

Retail Strategies uses STI:PopStats as our provider of the Consumer Demand and Supply by Establishment (or GAP) information. Several demographers provide the data in a variety of ways. Following are the sources and methodologies used by STI:PopStats and Retail Strategies to draw conclusions for you.

The market supply data is derived from annual retail sales and expenditures from the source data. The source for market supply is U.S. Census Bureau's monthly and annual Census of Retail Trade (CRT) Reports; U.S. Census Bureau's Economic Census. The source for the establishment is Bureau of Labor Statistics (BLS). The consumer demand data by establishment is derived from the BLS Consumer Expenditure Survey (CE).

Industries for the consumer expenditures survey are categorized and defined by the North American Industry Classification System (NAICS). Retail Strategies has narrowed down the categories to only those with real estate growth potential based on national trends.

Data is rarely perfect, but with proper analysis can get us a lot closer to the answer than we would be without it. This is one of several tools used to identify focus categories for recruitment. Our focus or more on the category than the actual dollar amounts.

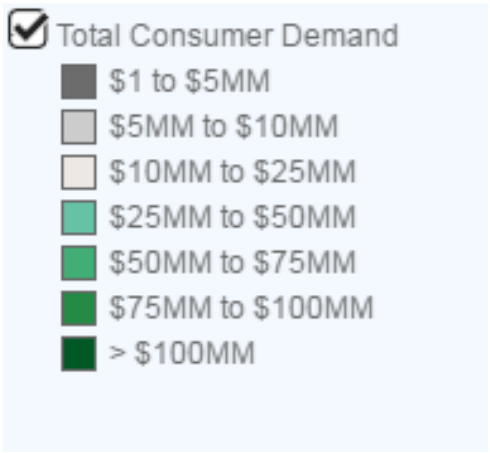
Discover: Total Market Supply

Total Market Supply

$107,046,456

This represents the amount captured by businesses located in the defined trade area. By block group the areas with darker green captured more dollars than the gray areas.

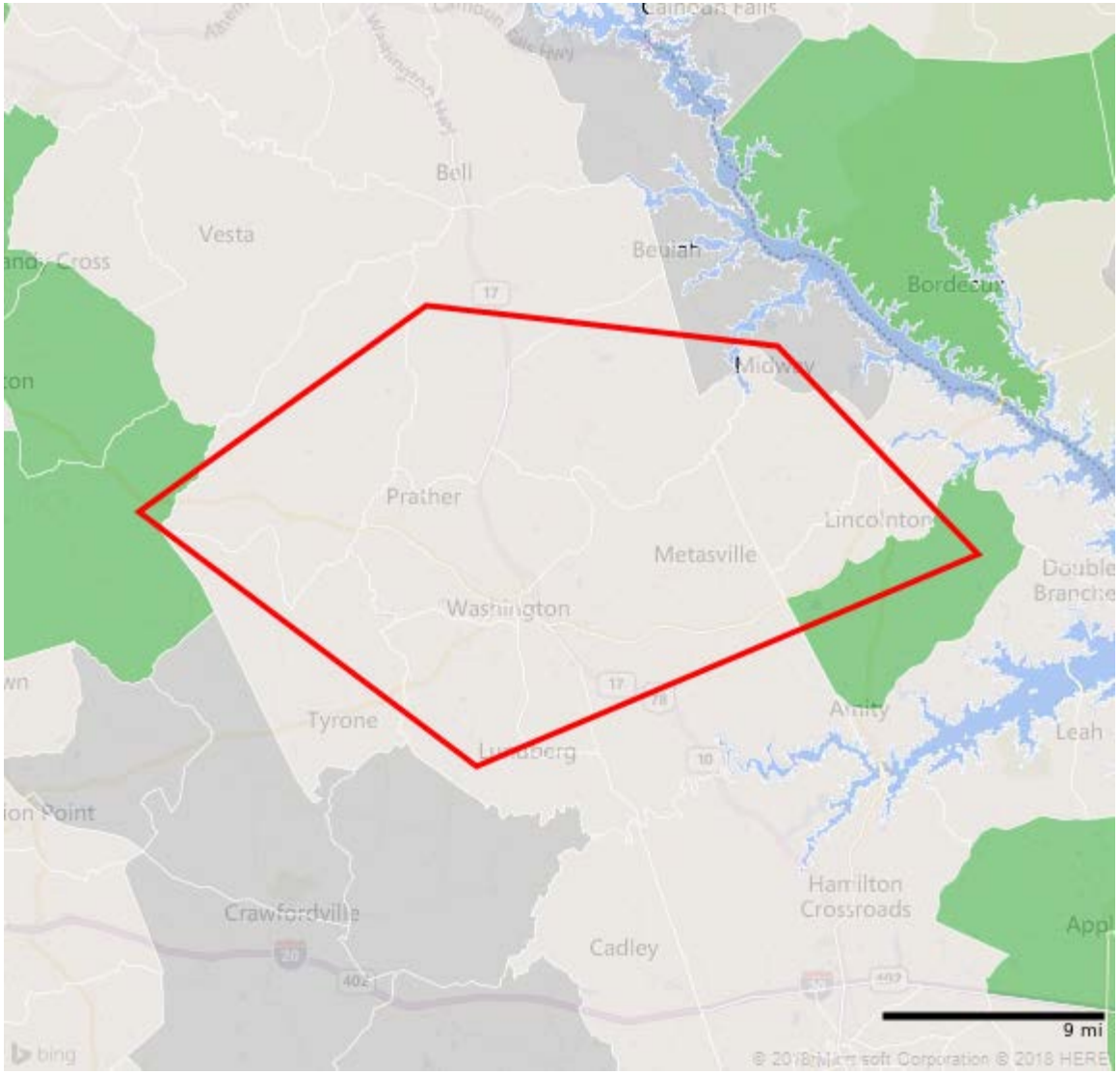
Discover: Total Market Demand



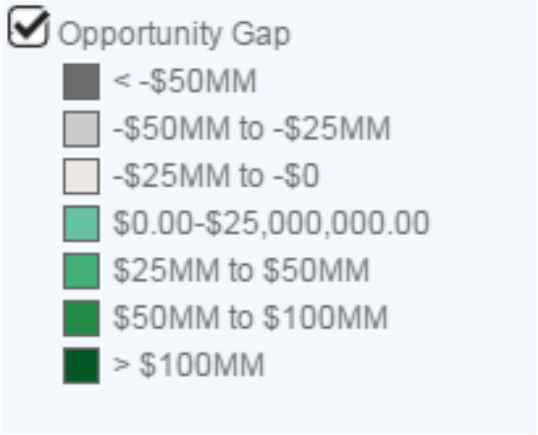
Total Market Demand

$180,237,761

This represents the amount spent by consumers located in the defined trade area. By block group the areas with darker green captured more dollars than the gray areas.



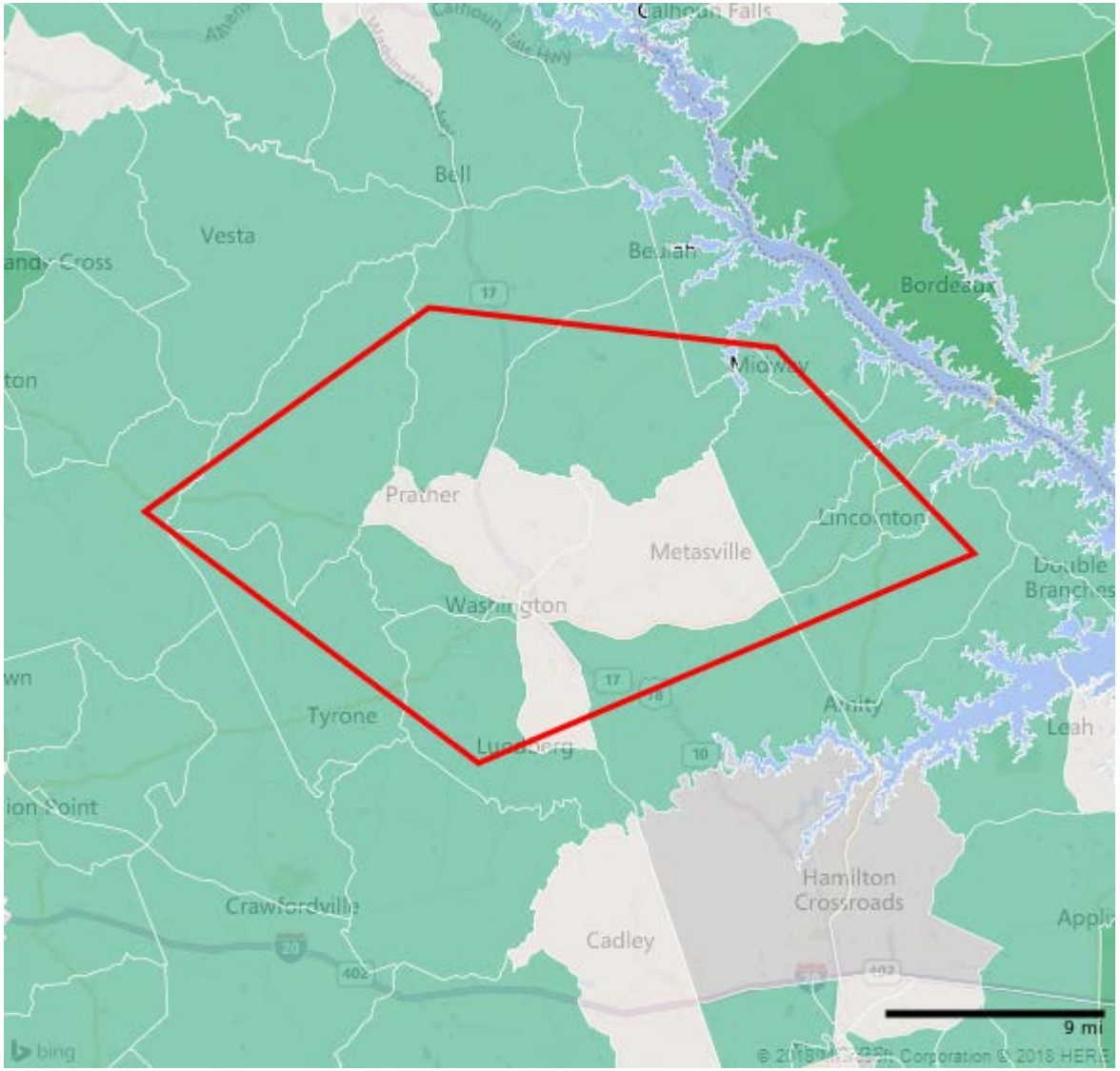
Discover: Opportunity Gap



Total Market Leakage of

$73,191,305

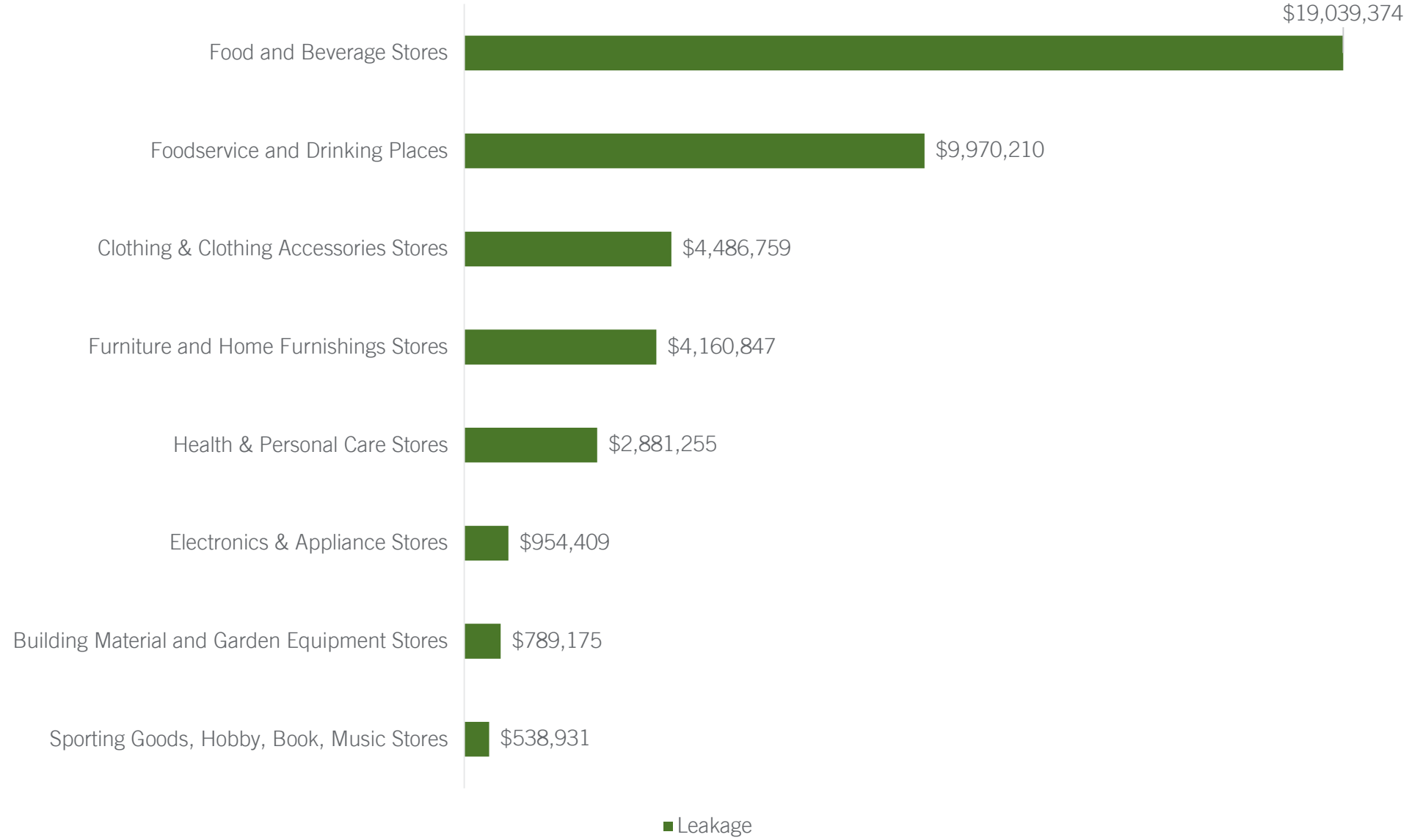
This means more people purchase items outside of the defined trade area than in the defined trade area for their consumer goods and services. Finding the specific categories where they are leaving the market is the key. Dark gray shows block groups of retail synergy capturing those dollars. This is where our focus will be to place new retailers and restaurants.



Discover: Consumer Demand & Supply

Category	Consumer Demand	Market Supply	Opportunity Gap
Furniture and Home Furnishings Stores	$4,160,847	$0	$4,160,847
Electronics & Appliance Stores	$3,234,346	$2,279,938	$954,409
Building Material and Garden Equipment Stores	$12,116,191	$11,327,016	$789,175
Food and Beverage Stores	$30,932,289	$11,892,915	$19,039,374
Health & Personal Care Stores	$9,451,472	$6,570,217	$2,881,255
Clothing & Clothing Accessories Stores	$8,904,542	$4,417,782	$4,486,759
Sporting Goods, Hobby, Book, Music Stores	$3,030,731	$2,491,800	$538,931
Foodservice and Drinking Places	$18,867,914	$8,897,704	$9,970,210

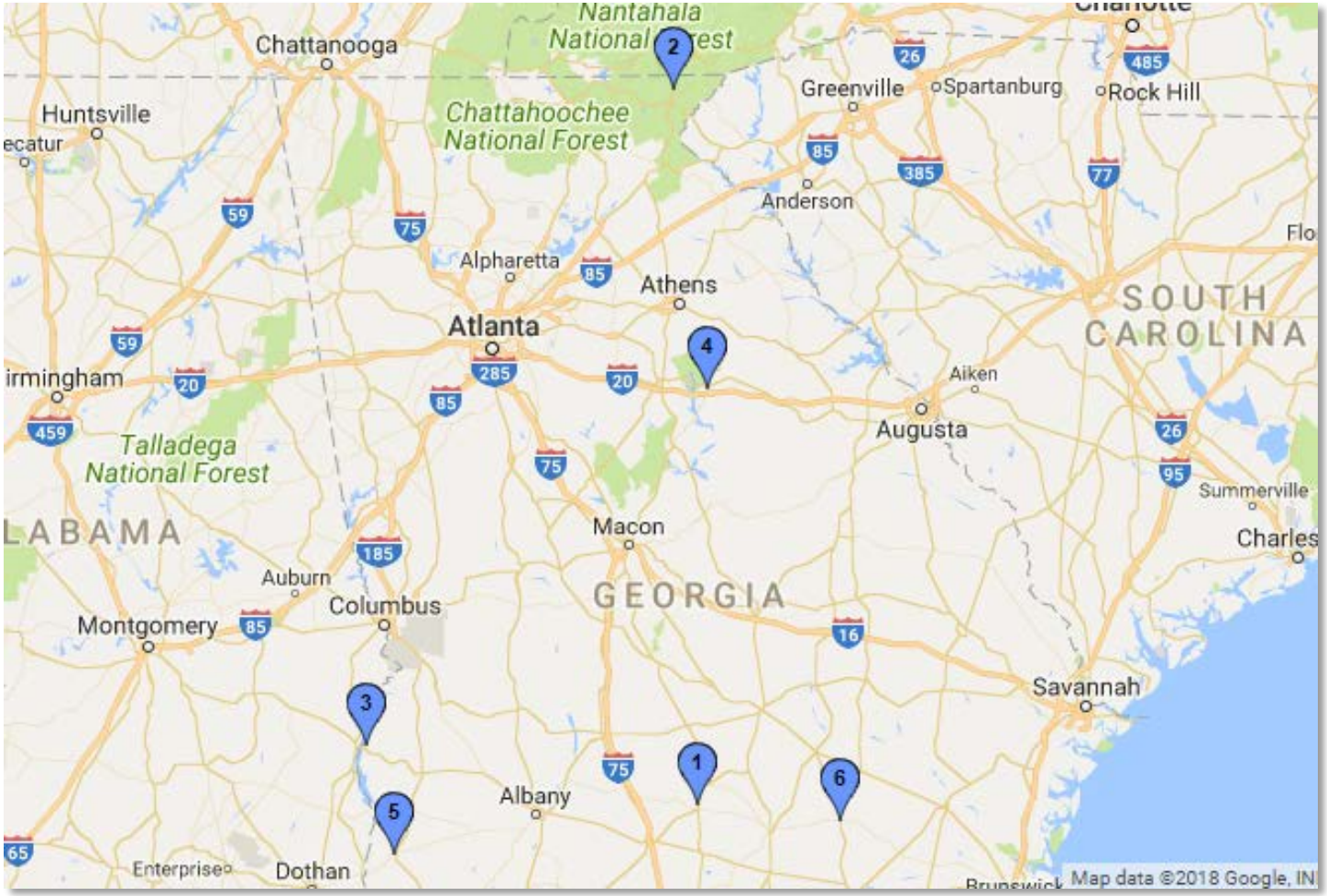
Discover: Leakage



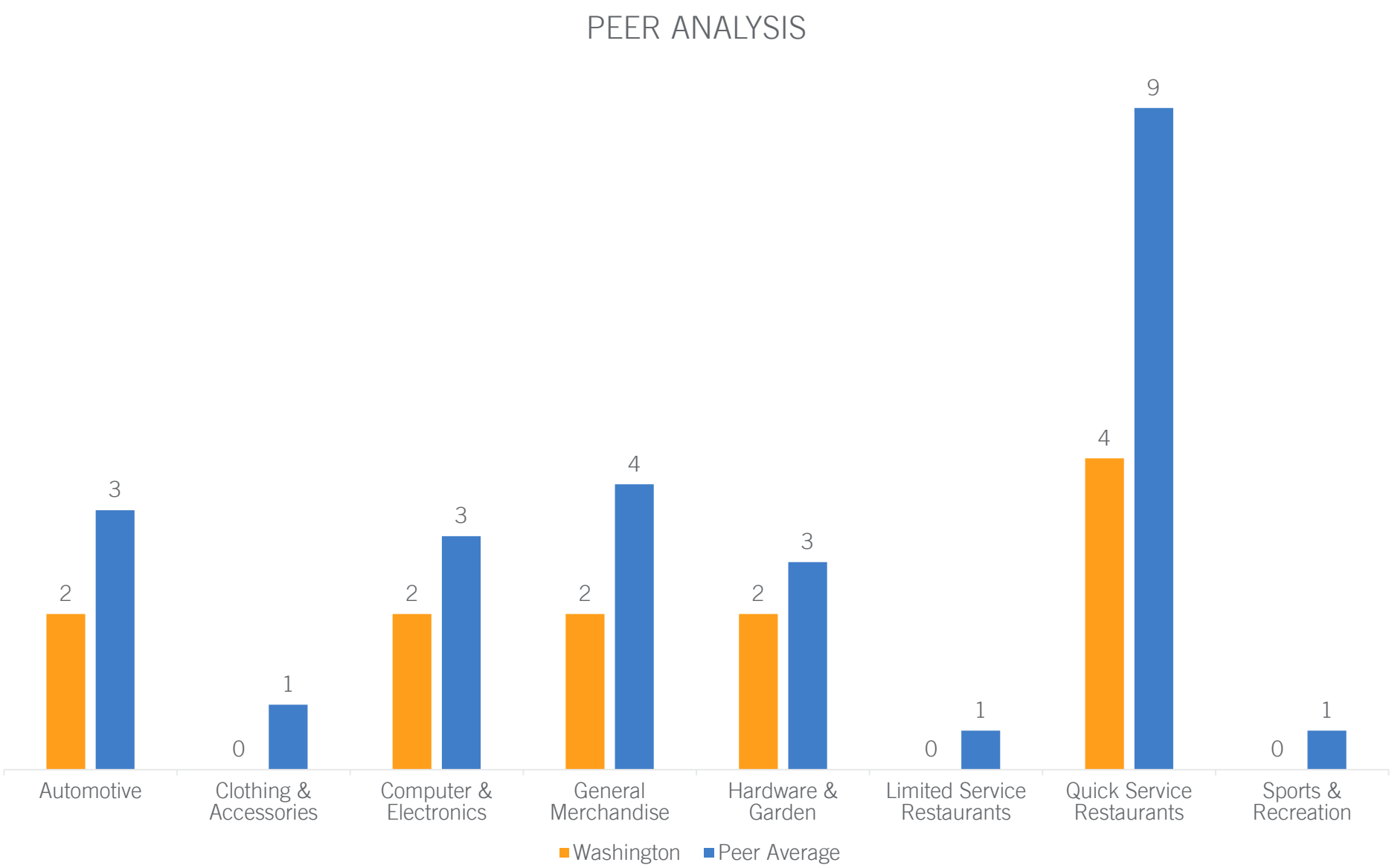
Discover: Peer Analysis

City	State	Residential Pop	Employed Daytime Pop	Median HH Income	Market Supply
Washington	GA	5,774	7,901	$33,598	$65,373,590
(1) Ocilla	GA	5,483	8,046	$31,834	$78,313,689
(2) Clayton	GA	6,687	7,751	$31,326	$181,021,126
(3) Georgetown	GA	6,252	9,294	$30,507	$161,535,652
(4) Greensboro	GA	5,354	8,025	$35,110	$159,484,365
(5) Blakely	GA	5,647	7,415	$36,743	$56,796,791
(6) Alma	GA	6,552	9,216	$35,947	$159,647,203

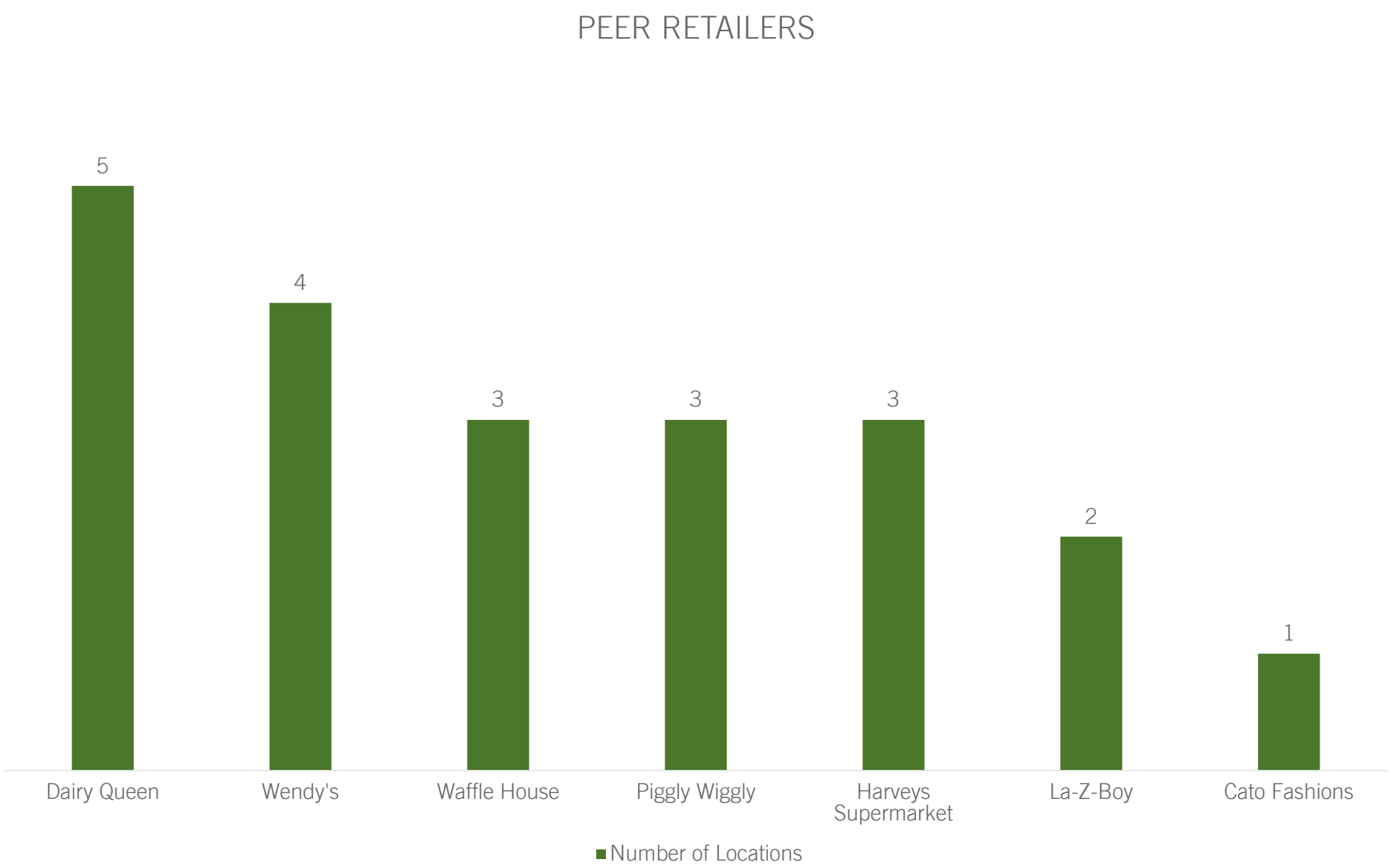
Discover: Peer Analysis



Discover: Peer Analysis

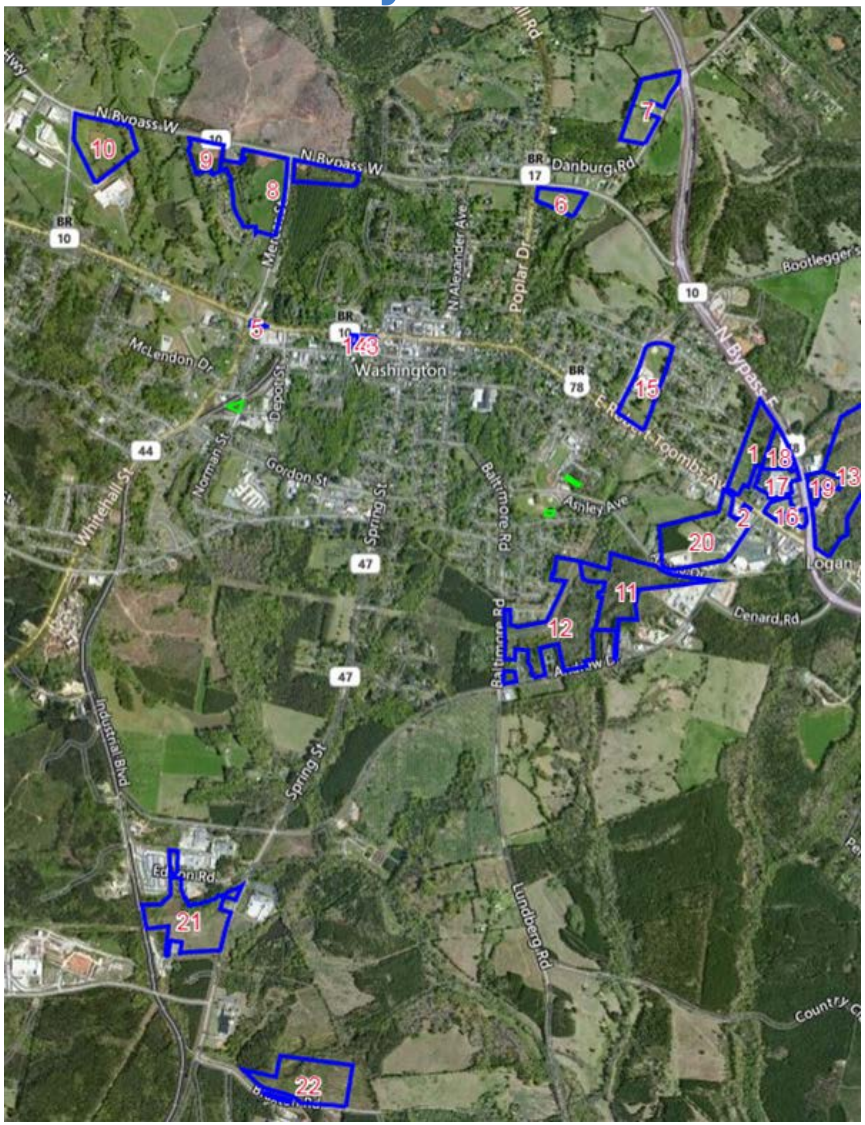


Retail Prospects



Focus Recruitment Zone Analysis

Focus Recruitment Zone Analysis



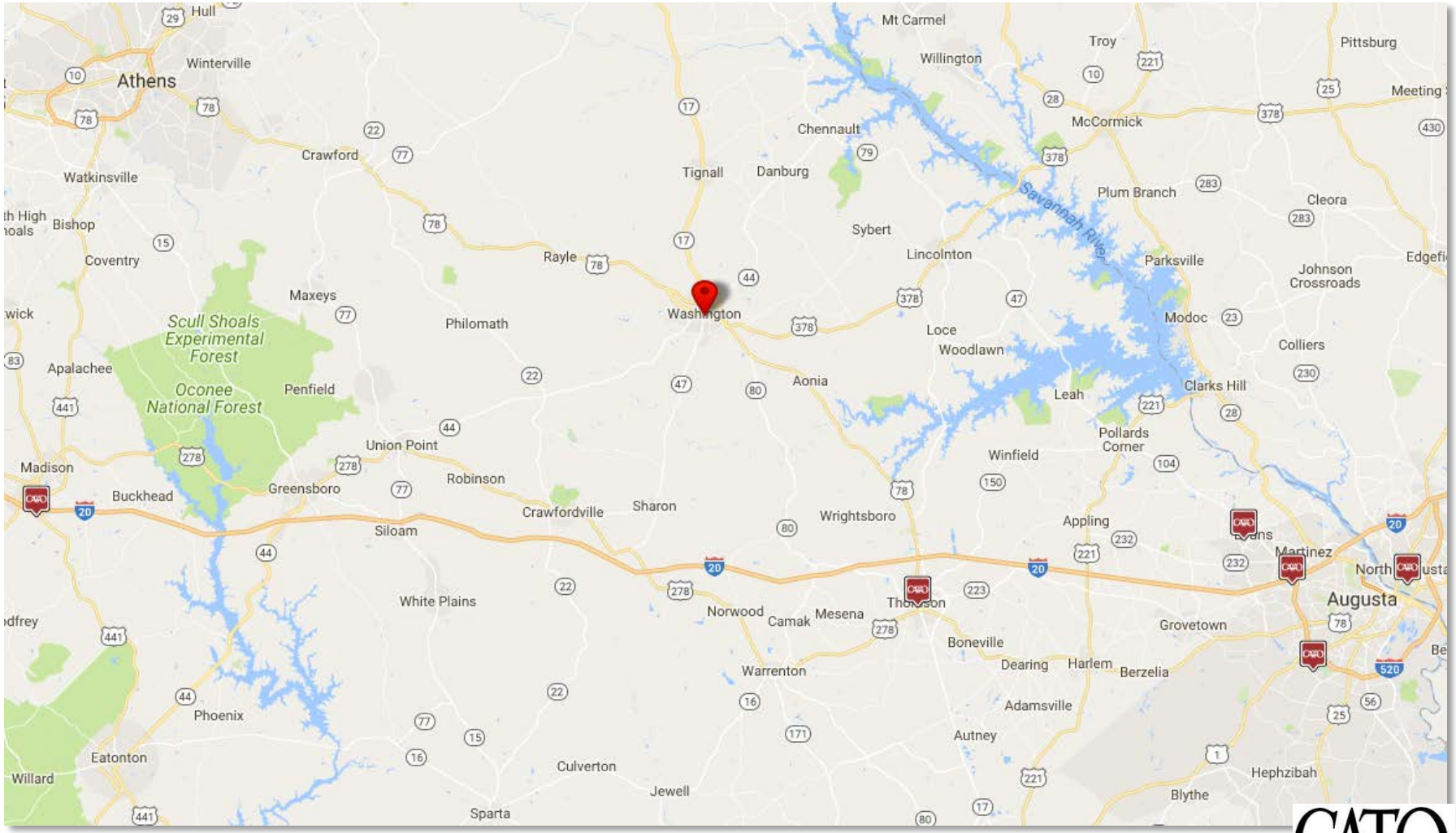
Focus Real Estate Analysis

Focus Real Estate Analysis

Focus Real Estate Analysis

Retail Prospects

Retail Prospects



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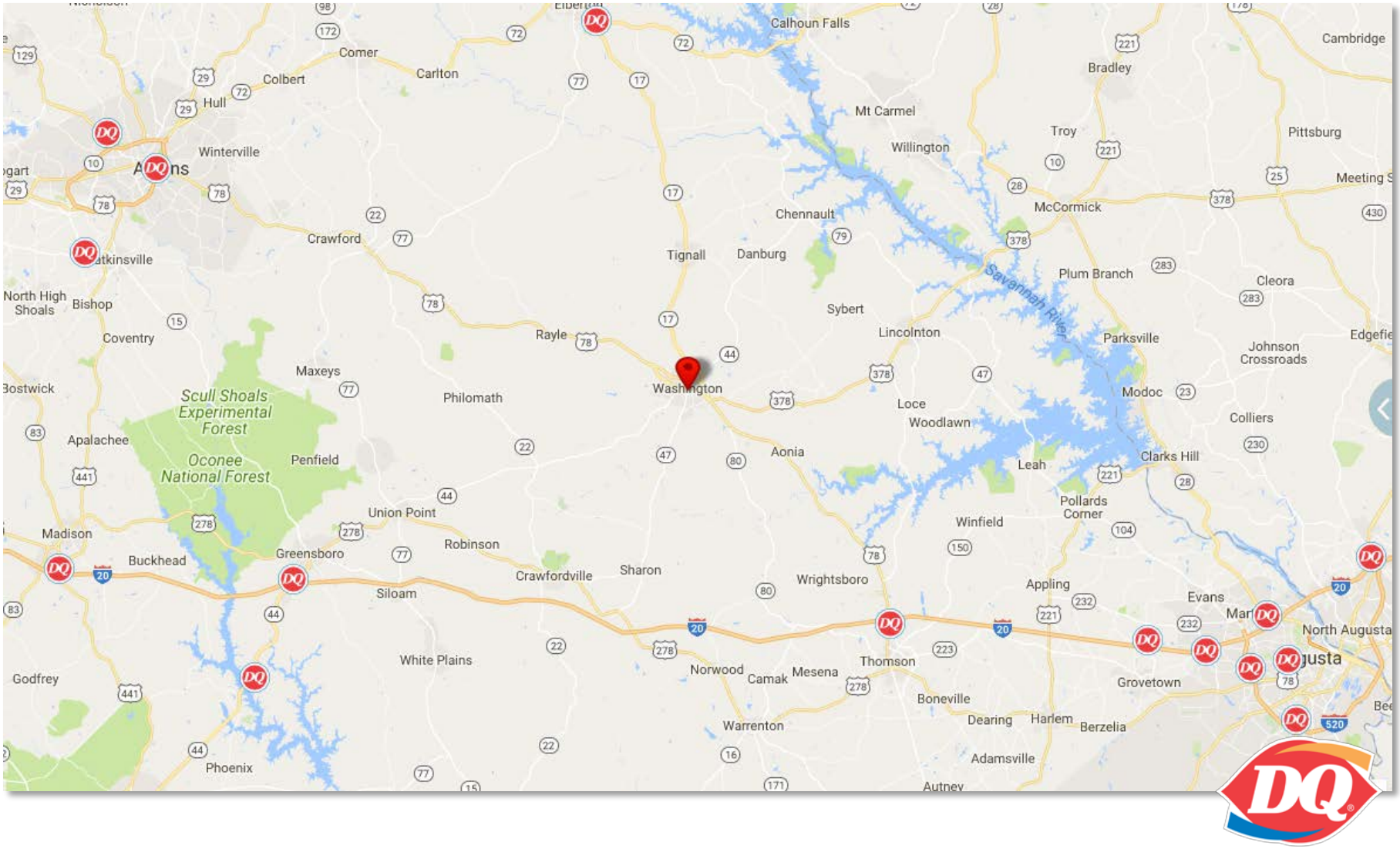
Cato Fashions

Category:	Apparel - Womens
Demographic Requirement Radius Ring:	Varies
Demographic Requirement Minimum Population Requirement:	30,000
Demographic Requirement Household Income Requirement:	Varies
Demographic Comments:	Demographic Composition: Metro, middle & rural markets are considered. A broad range of income levels.
Number of Square Feet and/or Acres:	4,000 SF
Comments on Desired Location:	Your presentation should include: Local map with site and surrounding retail centers clearly indicated. Large site plan with tenant listing, store dimensions, parking, curb cuts and traffic lights. Leasing plan showing building and space dimensions.

CATO

Retail Prospects



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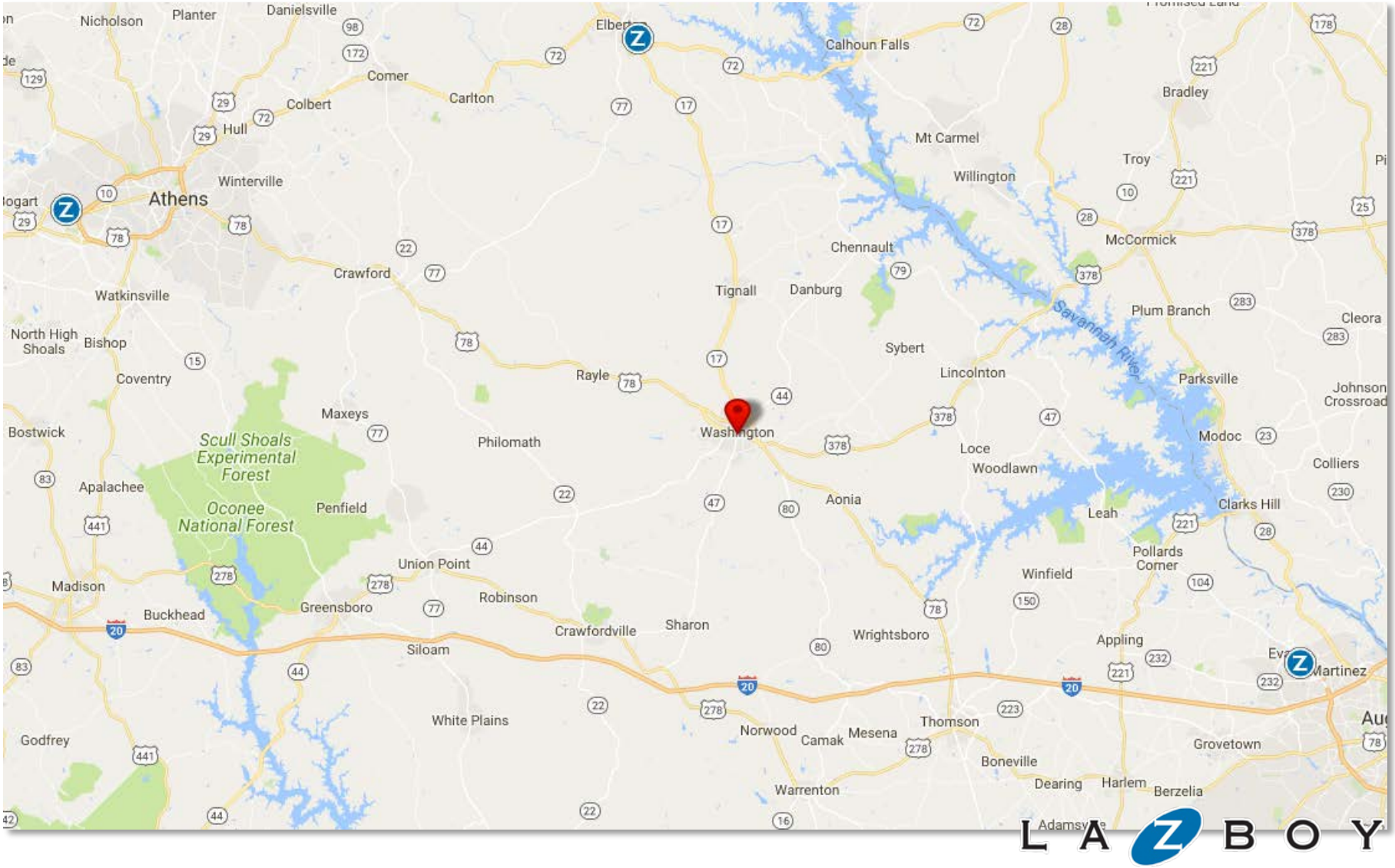
Dairy Queen Grill & Chill

Category:	Fast Food
Demographic Requirement Radius Ring:	Varies
Demographic Requirement Minimum Population Requirement:	12,000+
Demographic Requirement Household Income Requirement:	40,000+
Traffic Count:	20,000 VPD
Demographic Comments:	20k Average daily traffic in front of location, prefer additional traffic on intersecting street. Residential population: 12,500+ w/in 5 minute drive time. Employees: 5,000+ w/in 5 minute drive time. Median HH Income: minimum $40,000; prefer $50,000.
Number of Square Feet and/or Acres:	2,000 SF
Comments on Desired Location:	Seating: 72; Minimum lot size: 29,670 sq ft & 129' frontage; Minimum of 48 parking spaces; Site can acquire drive- thru zoning approval. Prefer 6 car stack between window and menu with additional stack at entrance of drive thru.
Facility Type:	Free Standing, Neighborhood Strip, Regional Strip, Special Strip

Retail Prospects



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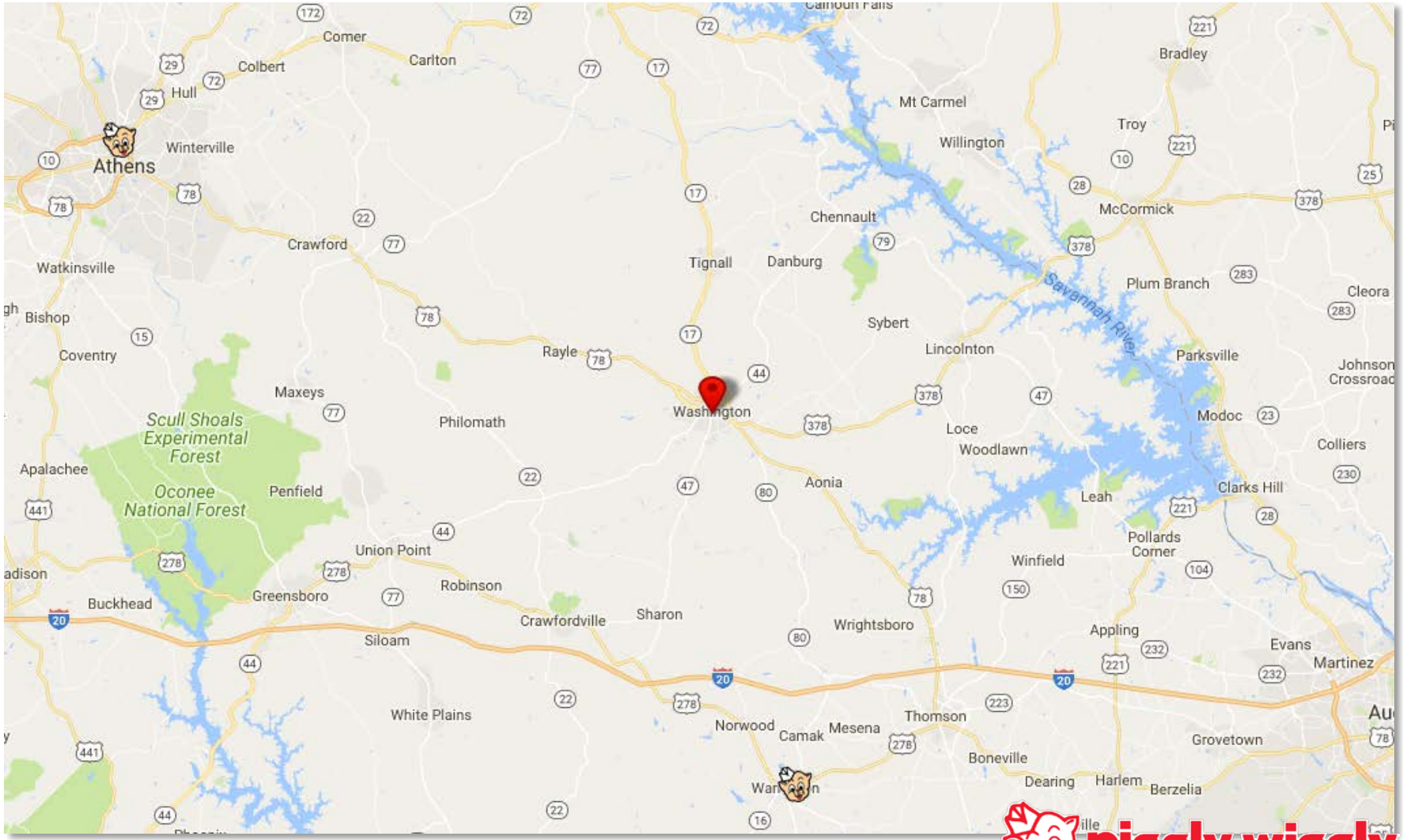
La-Z-Boy Furniture Galleries

Category:	Furniture
Demographic Requirement Radius Ring:	Varies
Demographic Requirement Minimum Population Requirement:	200,000
Traffic Count:	40,000 VPD
Demographic Comments:	Men & women, age 35-64, married with children, annual household income of $50,000+, college graduate or some college, homeowner. Must be located in an area that has a population of 200,000, a total of 90,000 single family homes and a traffic count of 40,000 cars per day or more.
Number of Square Feet and/or Acres:	12,000 SF
Comments on Desired Location:	Free Standing, Lifestyle Center, Power Center, Regional Mall

LA-Z-BOY

Retail Prospects



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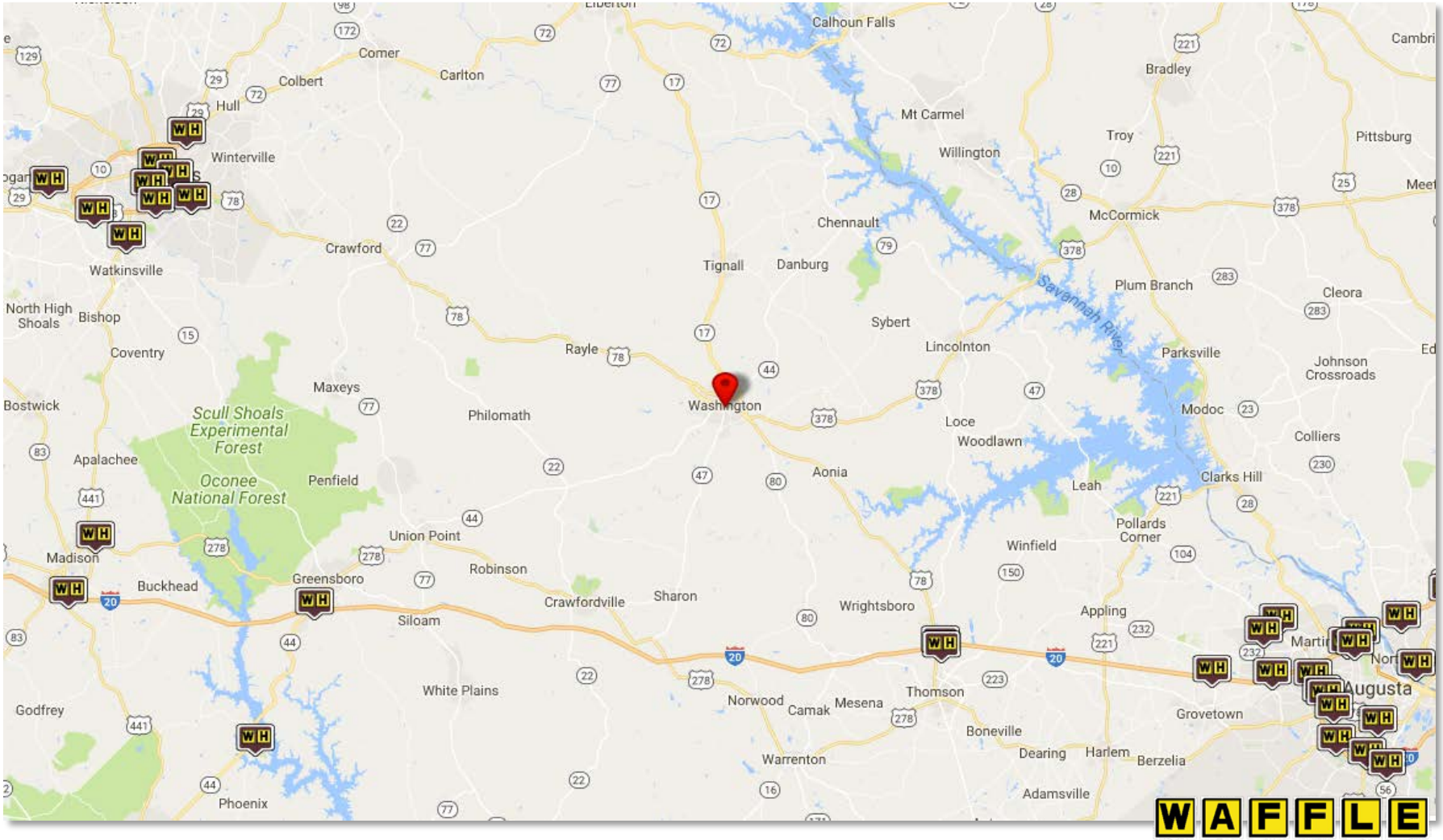
Piggly Wiggly

Category:	Supermarket / Grocery Store
Demographic Requirement Radius Ring:	Varies
Traffic Count:	Varies
Number of Square Feet and/or Acres:	17,000 SF
Comments on Desired Location:	Free Standing, Neighborhood Strip, Regional Strip, Special Strip

piggly wiggly

Retail Prospects



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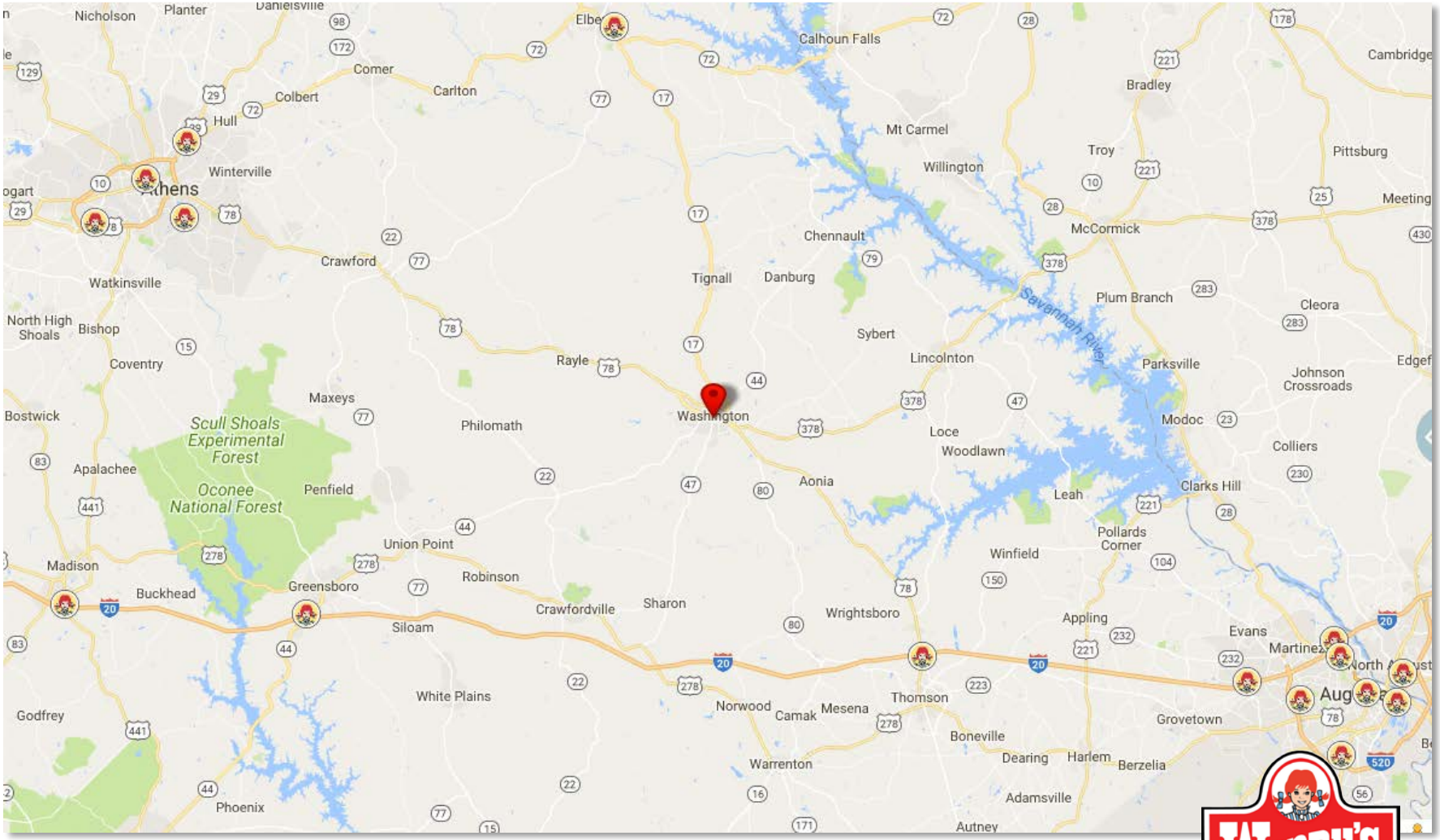
Waffle House

Category:	Restaurant (family)
Demographic Requirement Radius Ring:	Varies
Number of Square Feet and/or Acres:	1,800 SF
Comments on Desired Location:	Free Standing, Neighborhood Strip, Regional Strip, Special Strip

WAFFLE HOUSE

Retail Prospects



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Wendy's

Category:	Fast Food
Demographic Requirement Radius Ring:	1
Demographic Requirement Minimum Population Requirement:	12,000
Demographic Requirement Household Income Requirement:	Varies
Traffic Count:	10,000 VPD
Demographic Comments:	Demographics require 12,000 residents within 1 mile; 25,000 residents within 2 miles; 35,000 residents within 3 miles. Minimum daytime population of {4 to 5 minutes optimum drive time} 5,000 workers within 1 mile and 10,000 workers within 2 miles.
Number of Square Feet and/or Acres:	2,500 SF
Comments on Desired Location:	Lot size: Pad- Accommodate up to a 3900 sf building with drive-thru window; Freestanding- 25,000 to 40,000 sq ft. 160 feet minimum frontage required. Property zoned for Drive-thru window. Superior access and visibility, with comprehensive signage availalable. Traffic generators in immediate area, such as power centers, shopping malls, theater/entertainment, hotels, etc.

Thank you!

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120 18th Street South, Suite 120, Birmingham, AL 35233 205.314.0386 **retailstrategies.com**