



retail strategies

RECRUITMENT PLAN

York, SC

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OVERCOMING

Our Role

CHALLENGES

GOALS

Resources

Tax Revenue

Job Creation

Time

Network

Quality of Life

New Business

Experience

WHO WE ARE

Your Team



Joshua Davis
Portfolio Director



Zach Price
Retail Development Associate

Leadership Team



Robert Jolly
CEO



Mead Silsbee
CFO



Lacy Beasley
President /COO



Clay Craft
VP of Client Services

Marketing Team



Courtney Hall
Chief Marketing Officer



Michelle Moultrie
Marketing Director



Ryder Richards
Creative Director



Lizzie Sanders
Marketing Associate

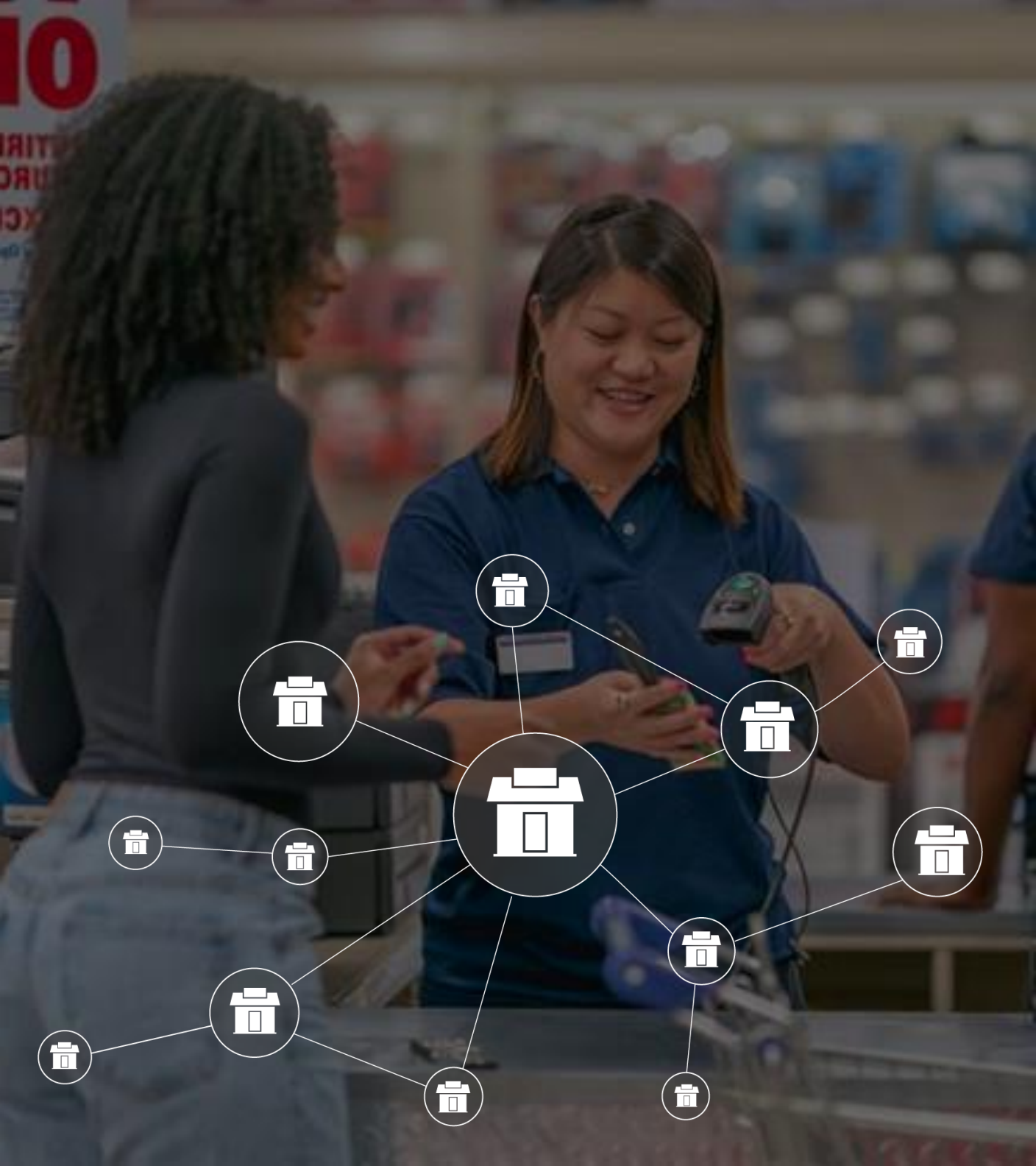
WHO WE ARE

Our Partnership

Retail Strategies is very pleased to partner with York, SC. We share a **common goal to generate new retail communication** that would not otherwise happen, and to **tell your story in a way that matters to retailers.**

We act as an **extension of your economic development arm**, and we surround your community with the resources and actions needed to create the desired results. Although we cannot guarantee success, we do guarantee you will be better off with us than without us.





RETAIL AS A CATALYST

Retail Empowers Economic Development

Standing as the **largest private-sector employer in the country** and with a remarkable contribution of **\$3.9 trillion** to the annual GDP, **retail is the backbone of the nation's financial well-being** and plays a pivotal role in **driving economic prosperity**.

What truly distinguishes retail is its ability to support a **workforce of 52 million Americans**, equivalent to **one in every four American jobs**. It's a dynamic industry that fosters career growth, offers well-compensated positions and acts as a launchpad for aspiring professionals.

RETAIL PROGRESSION CREATES COMMUNITY GROWTH

Why Should a Municipality Invest Resources in Retail?

Retail builds on retail. Retail economic impact adds up quickly. Retail attracts the workforce that attracts the primary jobs. Retail influences executives looking to locate their company in your community. Retail enhances the quality of life. Quality of life encourages the future growth of your community.

retail recruitment ladder



Retail builds tax base --- Retail adds jobs from entry-level to managerial --- Retail builds communities

A large, ornate library with high ceilings, arched windows, and rows of study tables with people working. The scene is dimly lit, with light coming from large windows and several ornate chandeliers hanging from the ceiling. The library has a classic, grand architectural style with stone walls and high vaulted ceilings. The study tables are arranged in long rows, and many people are seated at them, some using laptops. The overall atmosphere is quiet and studious.

discover

DATA

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. Retail Strategies has provided York's primary point of contact an electronic copy of each of these reports from multiple geographic parameters.

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

1

Demographic
Overview

2

Mobile Data
Collections

3

Customized Trade
Area Analysis

4

Lifestyle
Segmentation

5

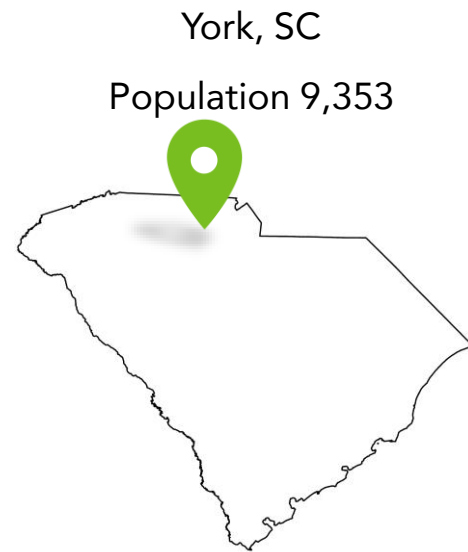
Retail
Gap Analysis

6

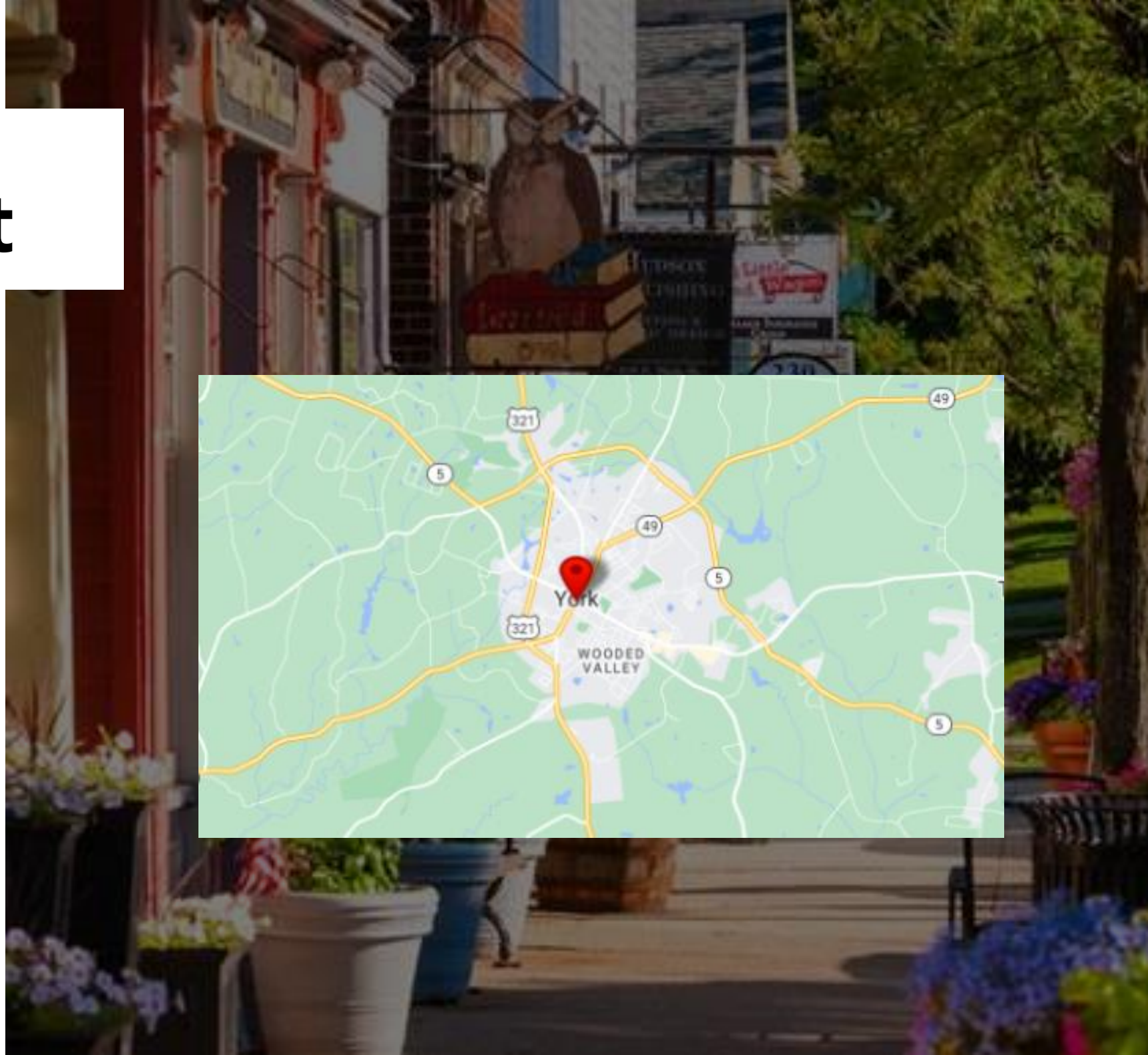
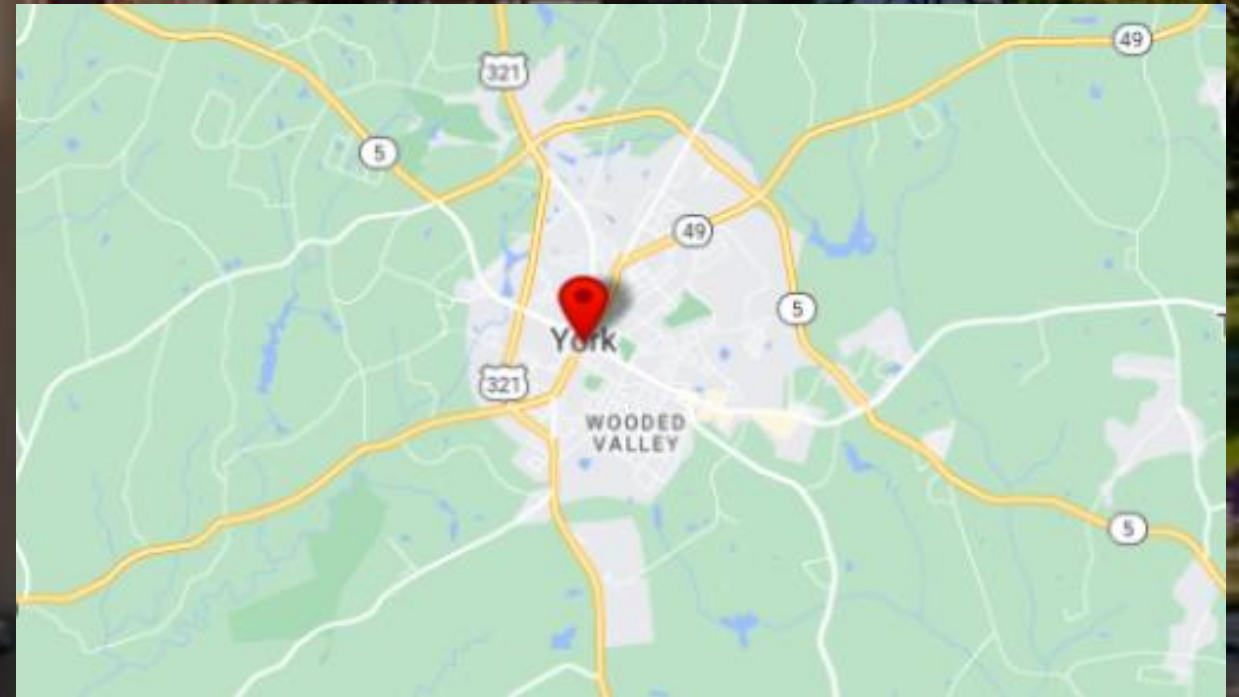
Peer
Analysis

DISCOVER

How you see it



State of South Carolina
Population 5.46 million



DISCOVER

How retailers see it

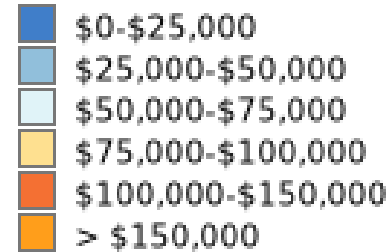
Residential Population Density

• 1 dot = 100

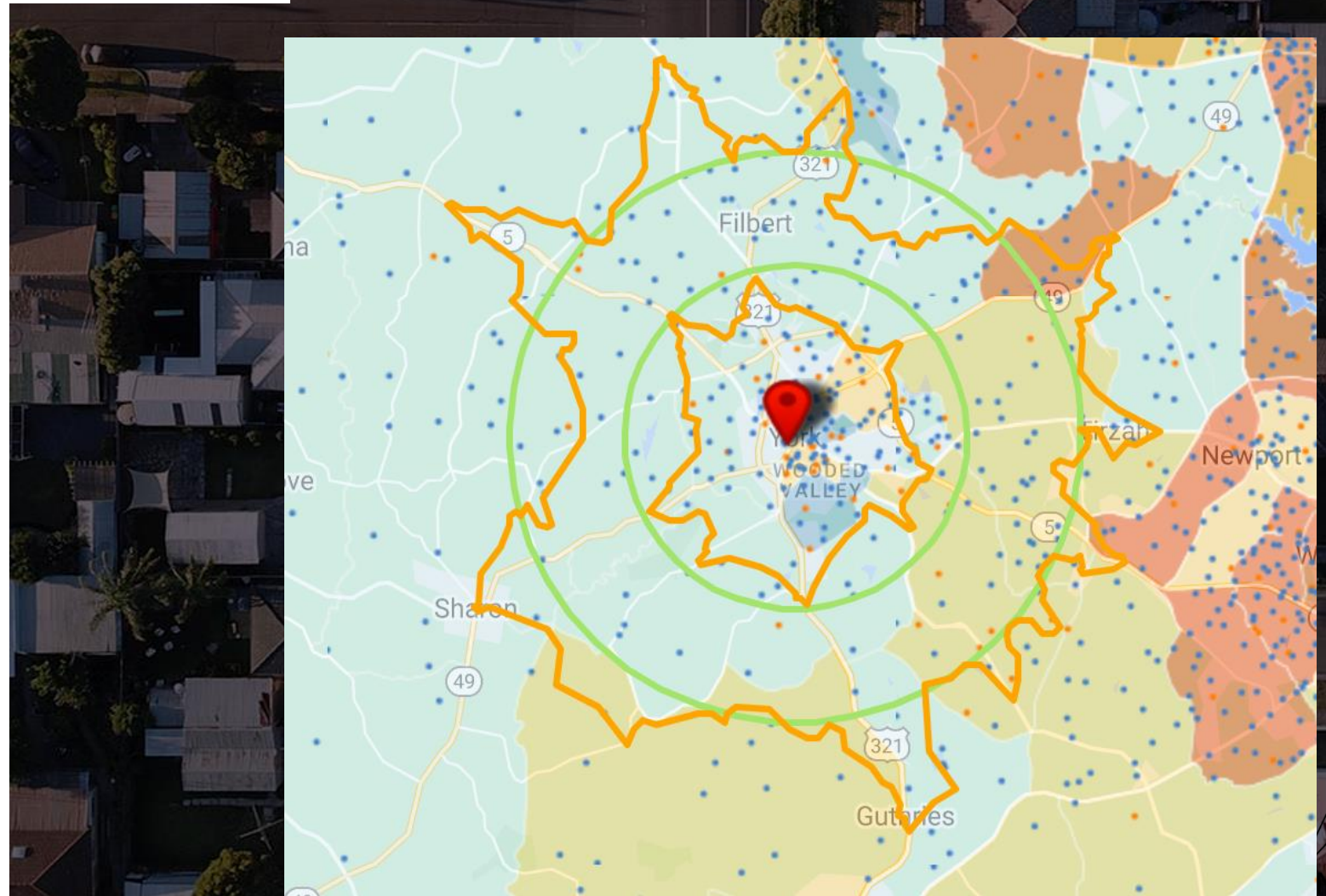
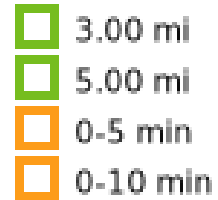
Daytime Employee Population Density

• 1 dot = 100

Median Household Income



Study Area



DISCOVER

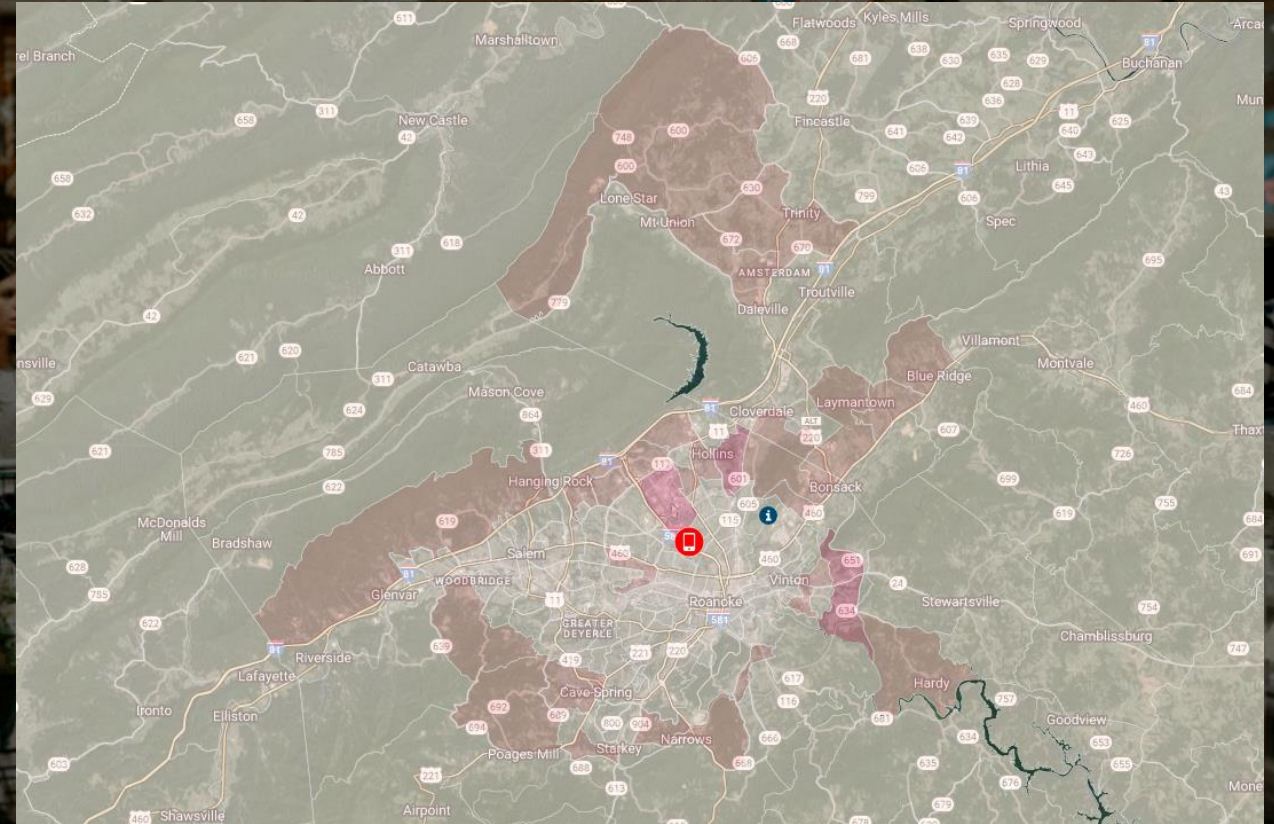
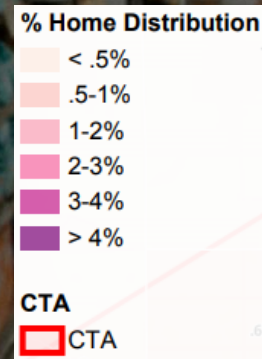
Your Demographic Playbook

Category	3-Mile Radius	5-Mile Radius	5-Minute Drive Time	10-Minute Drive Time
Current Year Estimated Population	13,173	23,132	3,798	20,632
Number of Households	4,897	8,541	1,440	7,674
Average Home Value	\$ 294,857	\$ 326,025	\$ 269,991	\$ 335,775
Population Growth % ('23-28)	1.3%	1.5%	2.3%	1.1%
Current Year Average Age	39.4	40.2	39.1	40.2
Current Year Median Household Income	\$ 53,000	\$ 61,792	\$ 50,473	\$ 62,172
Current Year % Bachelor's Degree	18.6%	17.6%	17.2%	18.9%
Total Number of Employees	5,237	6,444	1,728	6,351
Daytime Population	15,887	21,224	5,187	20,491

DISCOVER

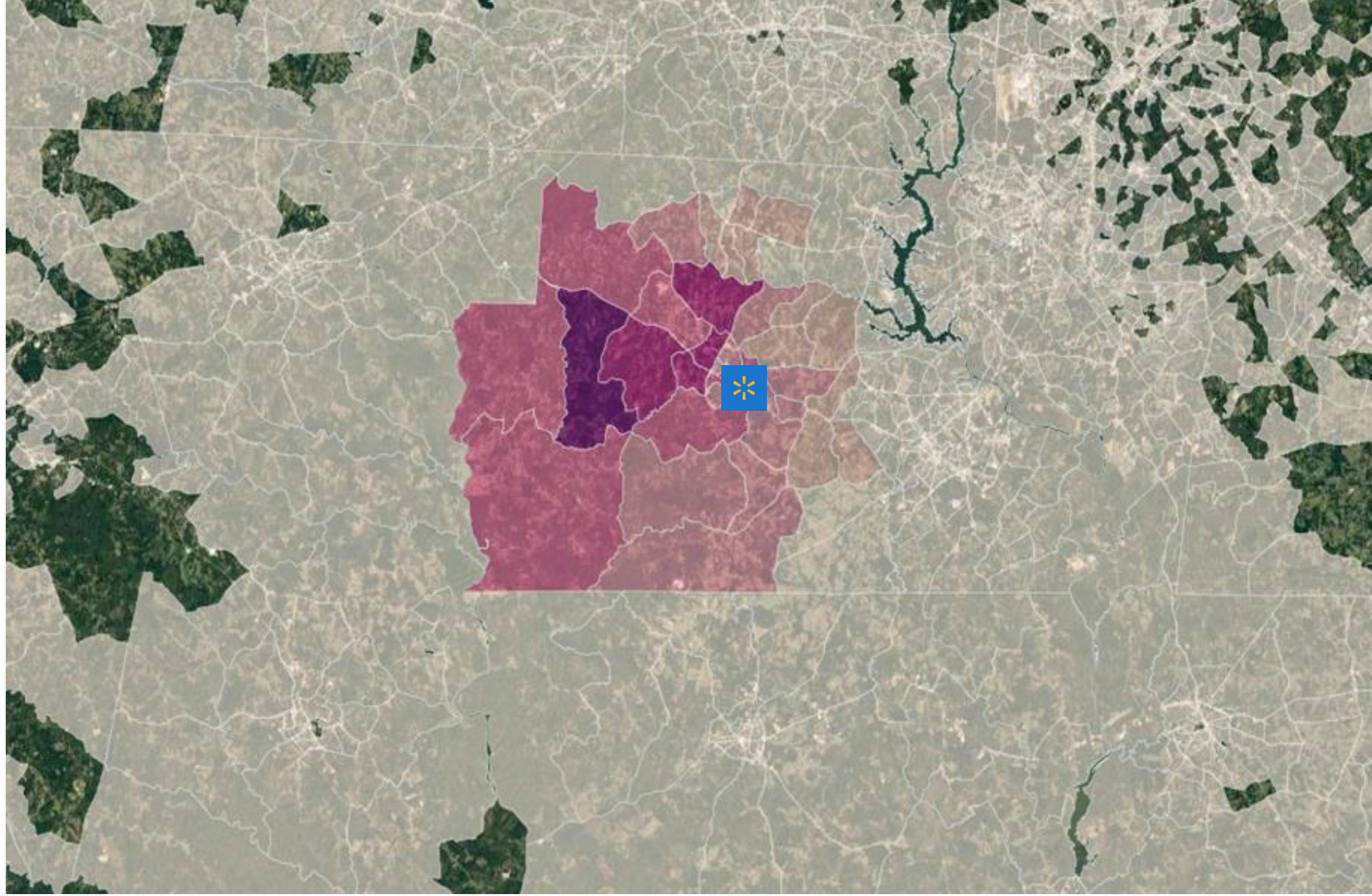
Mobile Data Collection

This mobile tracking service uses data collected from mobile phone users who have agreed within their apps and phone settings to enable location information. By drawing a geofence around a specific business or location, we are able to gather valuable data about the customer base that has actively used their mobile device while in the identified location. **This tool allows us to see where customers are coming from to shop in your market using actual data.** This information is used to optimize your trade area, analyze business locations, compare the frequency of visitors, and assist retailers in site selection. This is intended to support the trade area but does not solely define the trade area.



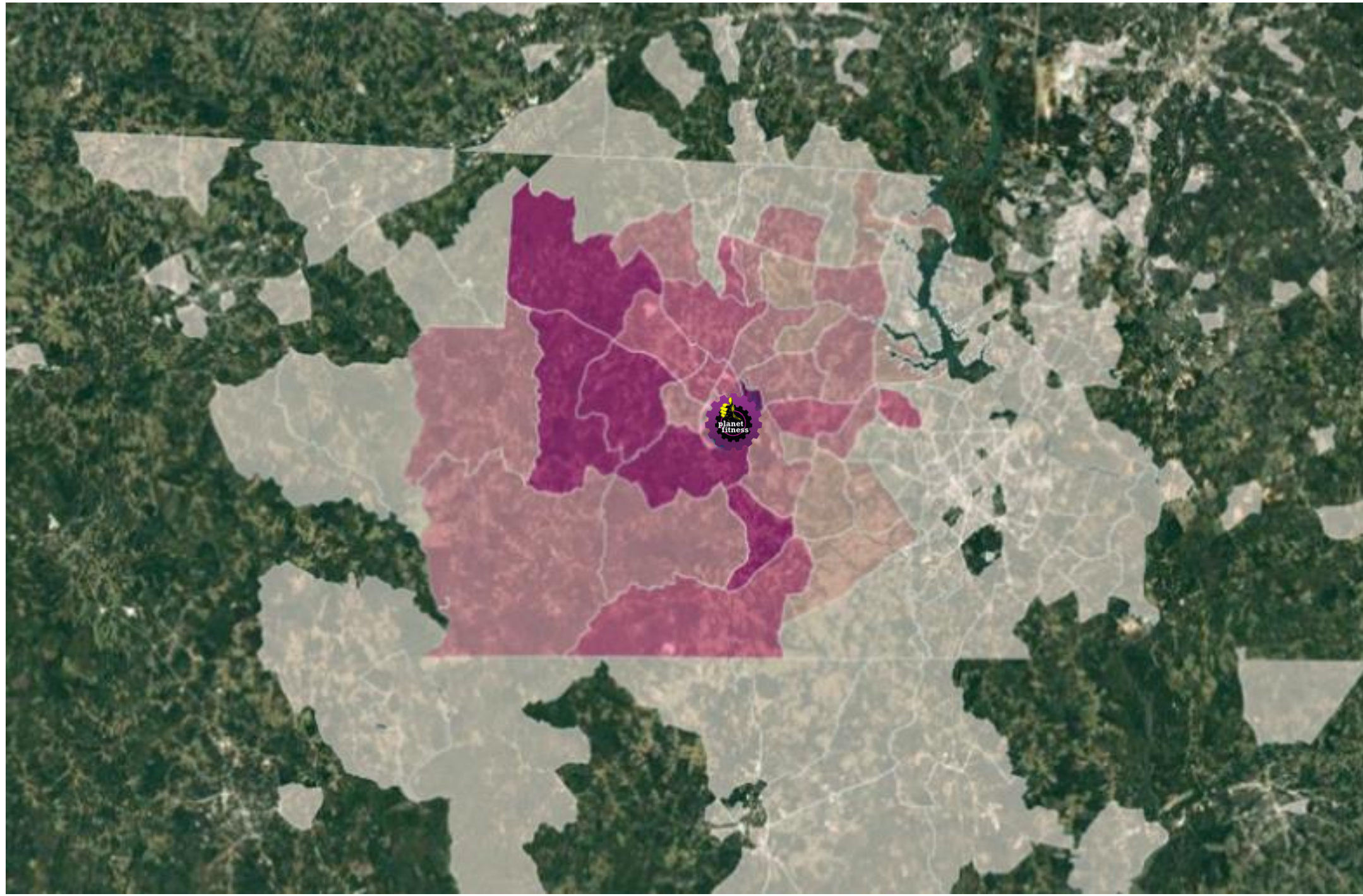
DISCOVER

Mobile Insights - Walmart



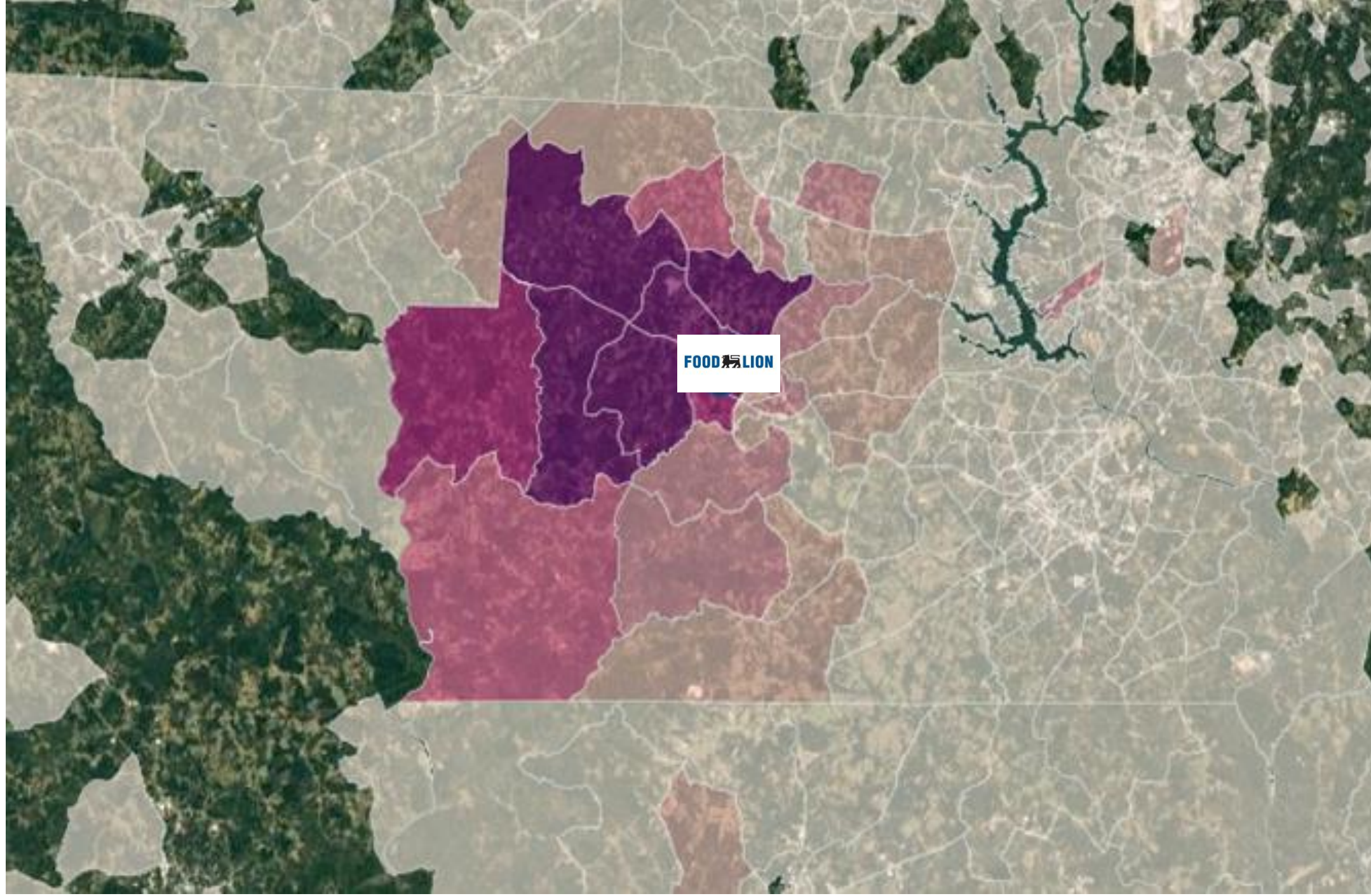
DISCOVER

Mobile Insights – Planet Fitness



DISCOVER

Mobile Insights – Food Lion

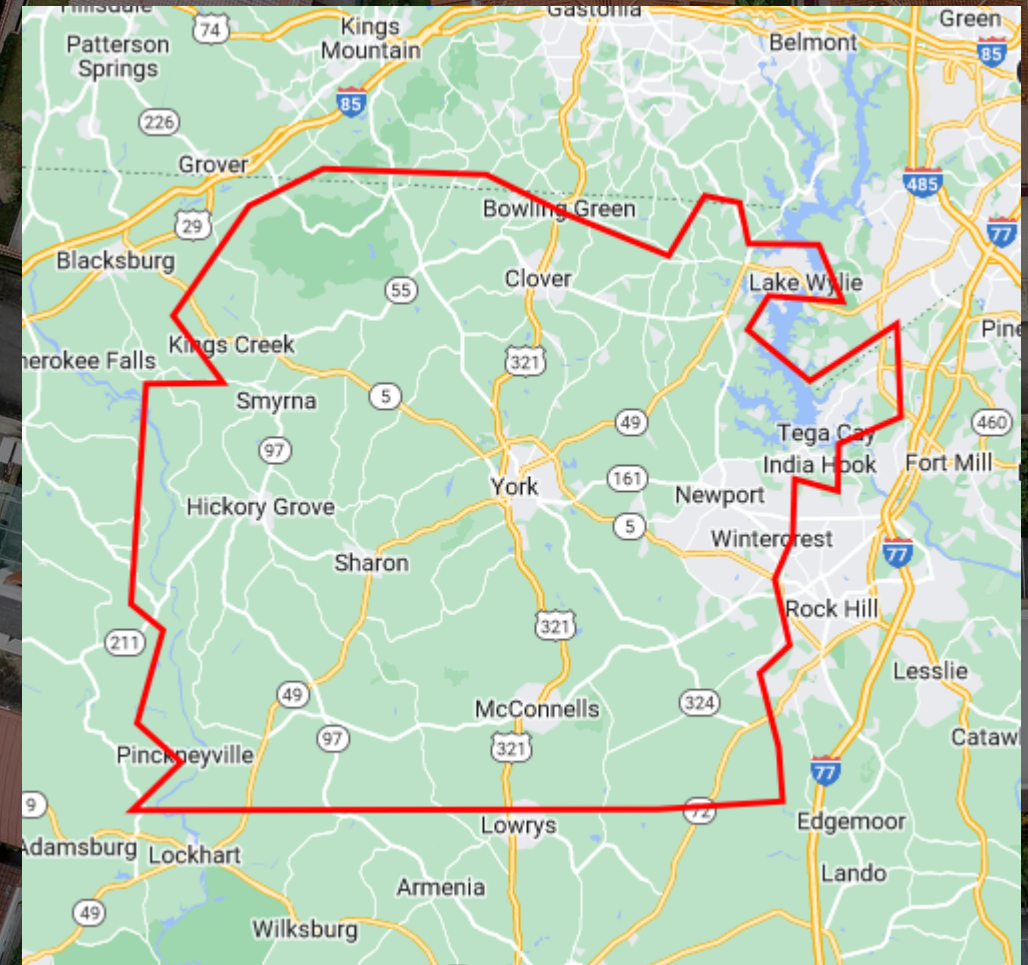


DISCOVER

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 are a start to evaluating the information sought by these decision makers. 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 the mobile tracking data with drive times, 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.

Retail Strategies has created the customized core trade area shown in the map here which is focused on a consumer who might travel to the market to shop or dine.



DISCOVER

Customized Trade Area

150,952
projected 2028 population



141,881
2023 estimated population

\$46,916
Median household income
\$71,351
(United States)

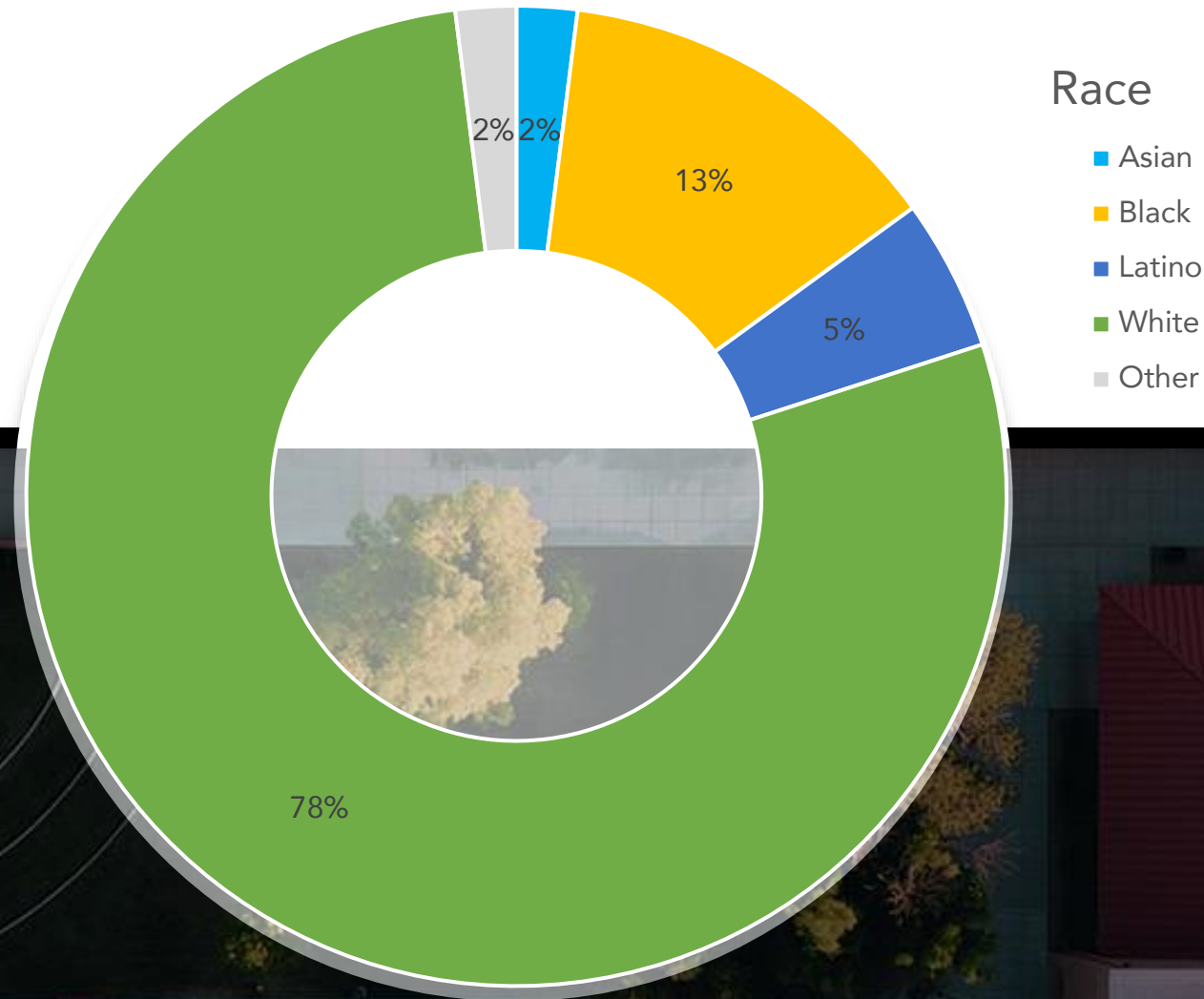
40
male average age
37.7
US Male Average

42
female average age
41.1
US Female Average

DISCOVER

Customized Trade Area

CURRENT YEAR ESTIMATED POPULATION BY RACE



DISCOVER

Customized Trade Area

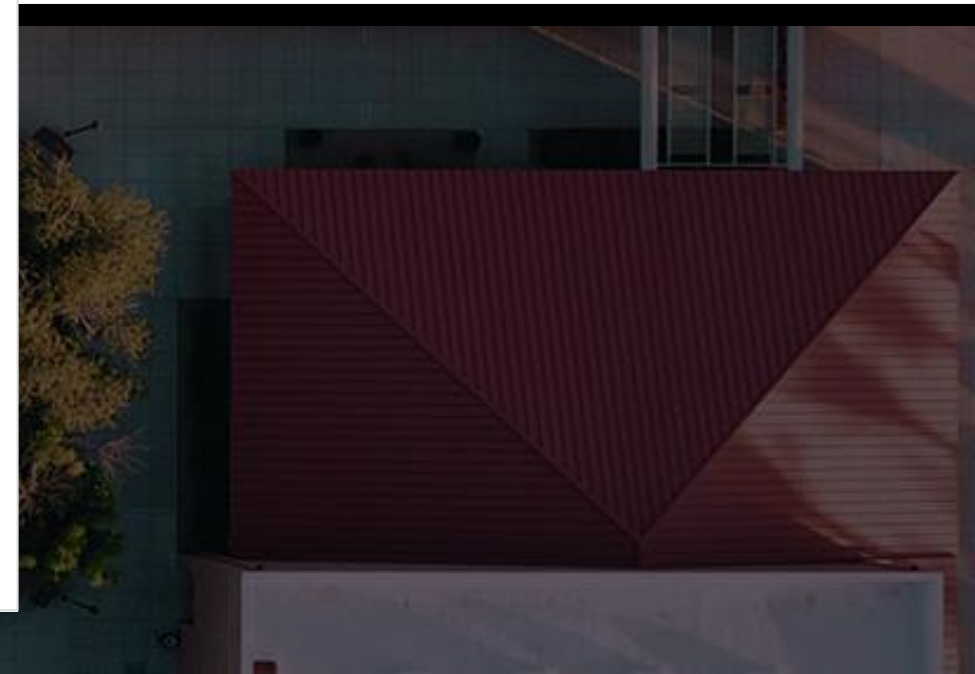
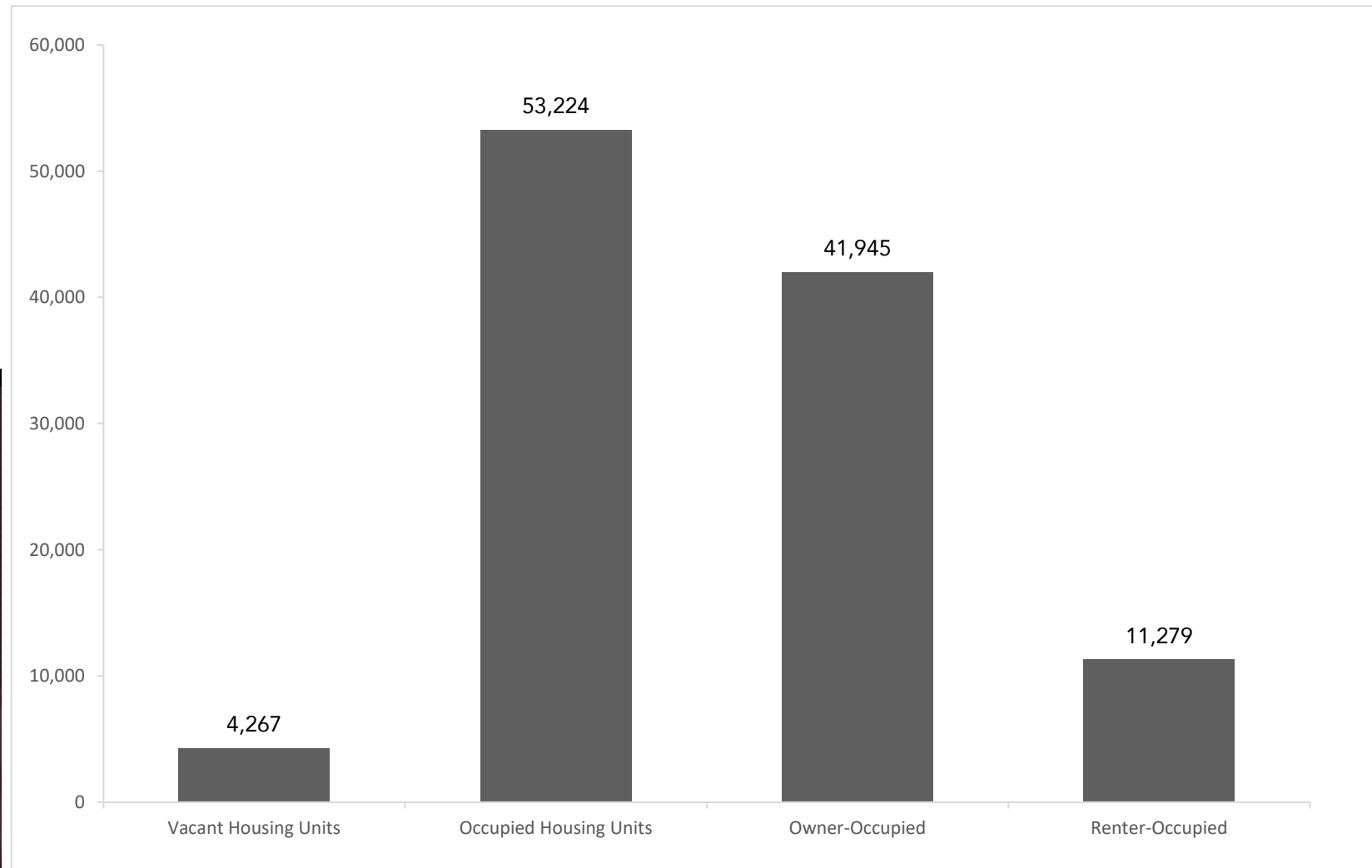
2023 ESTIMATED HOUSING
UNITS BY TENURE

\$453,996

average housing unit value

\$523,956

(United States)



DISCOVER

Custom Trade Area

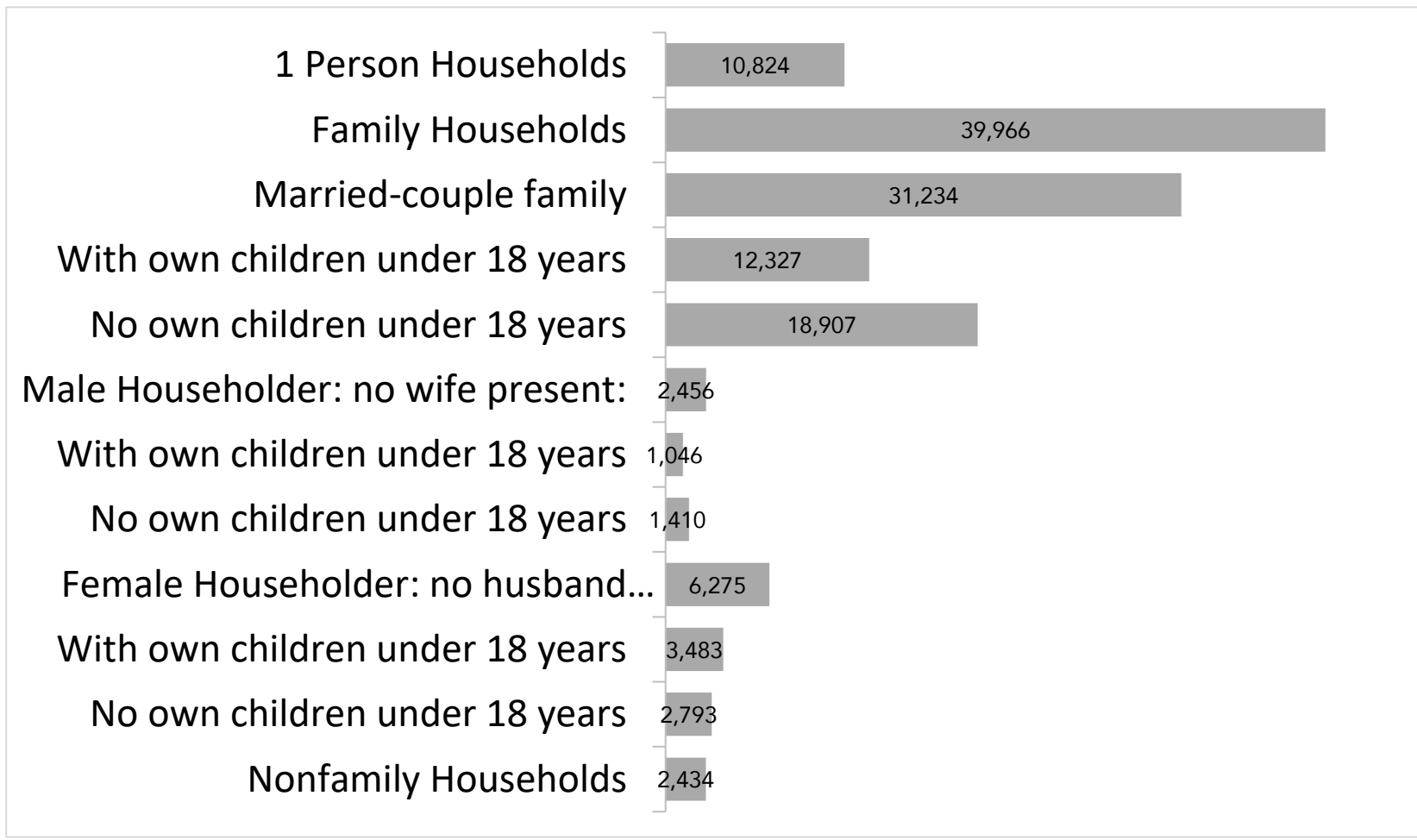
CURRENT YEAR ESTIMATED HOUSEHOLD BY TYPE

2.65

people per household

2.58

(United States)



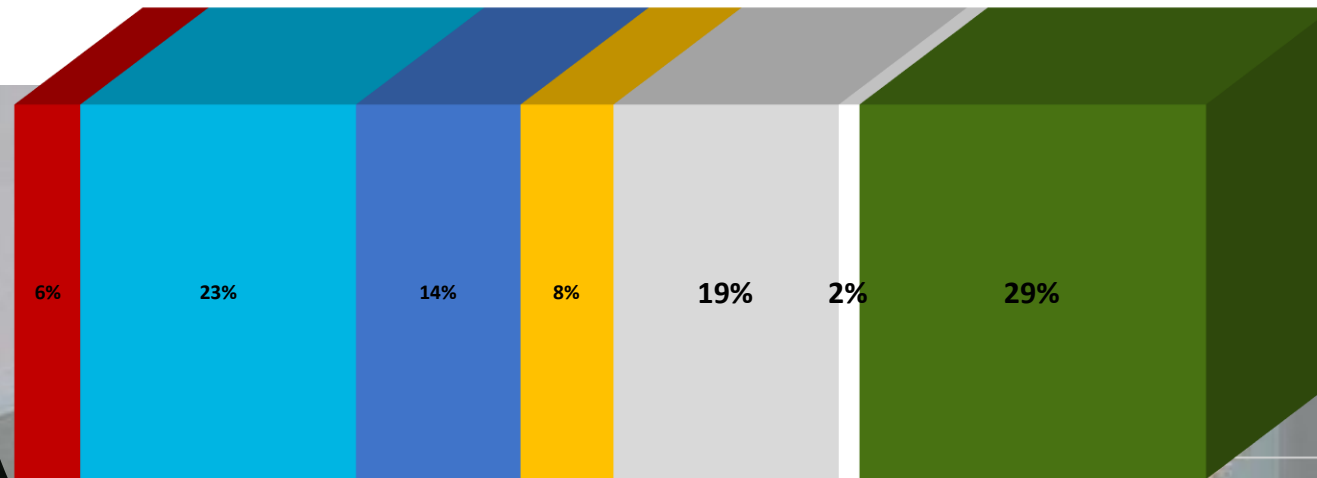
DISCOVER

Customized Trade Area

101,189
daytime population

DAYTIME POPULATION

- Children at home
- Retired/Disable persons
- Homemakers
- Work at Home
- Employed
- Unemployed
- Student Populations



DISCOVER

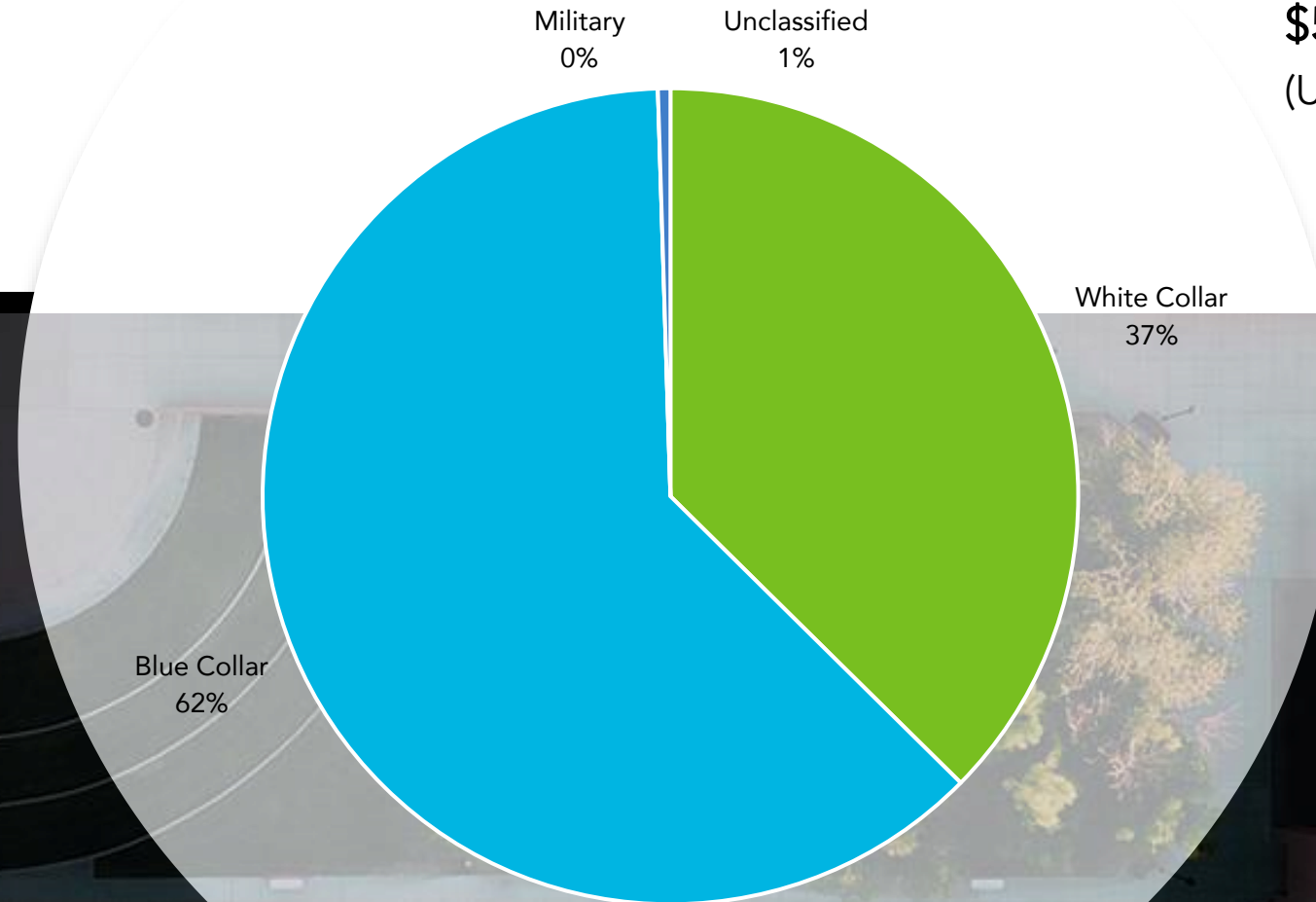
Customized Trade Area

\$53,897

average employee salary

\$59,428

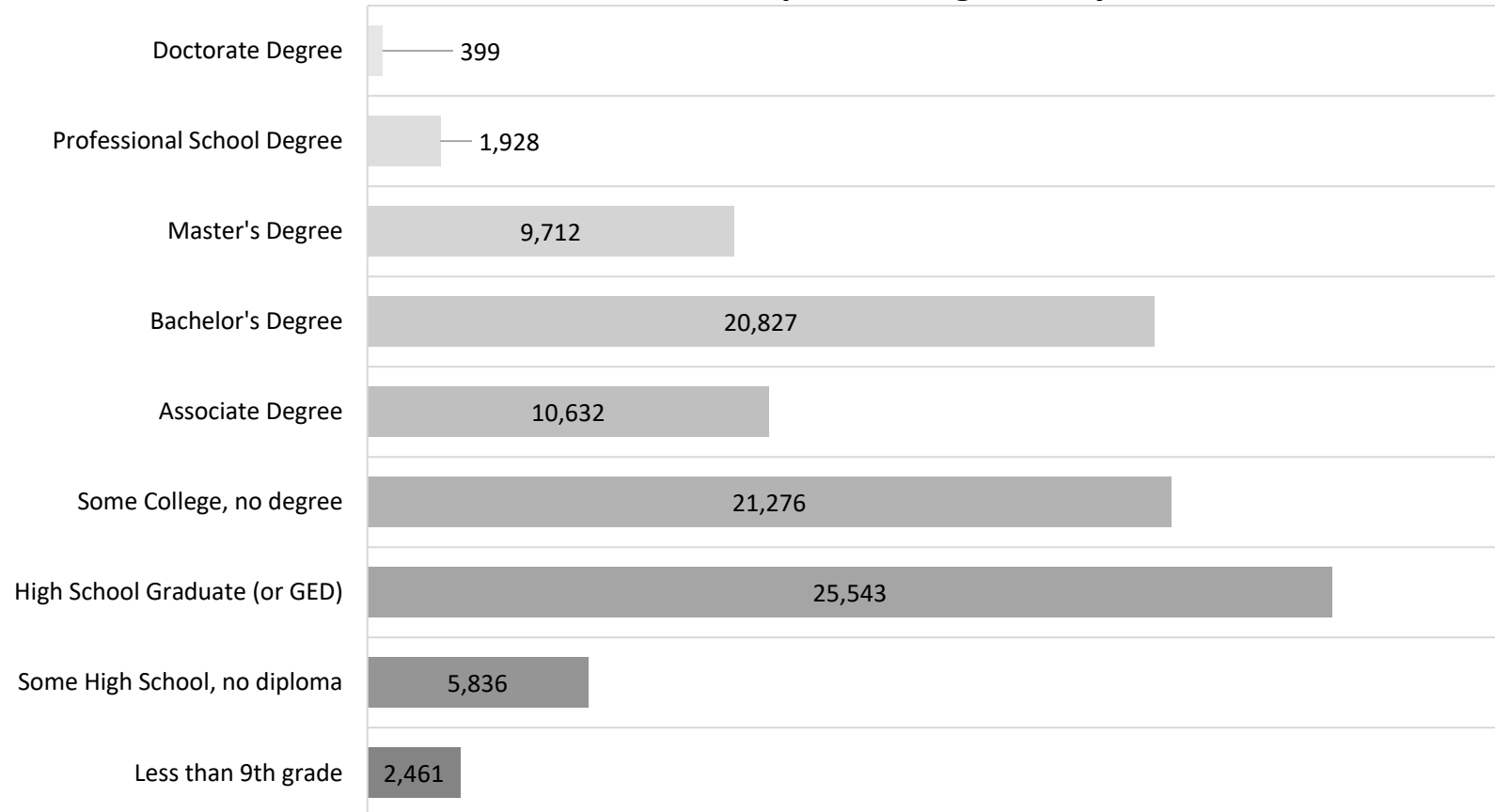
(United States)



DISCOVER

Customized Trade Area

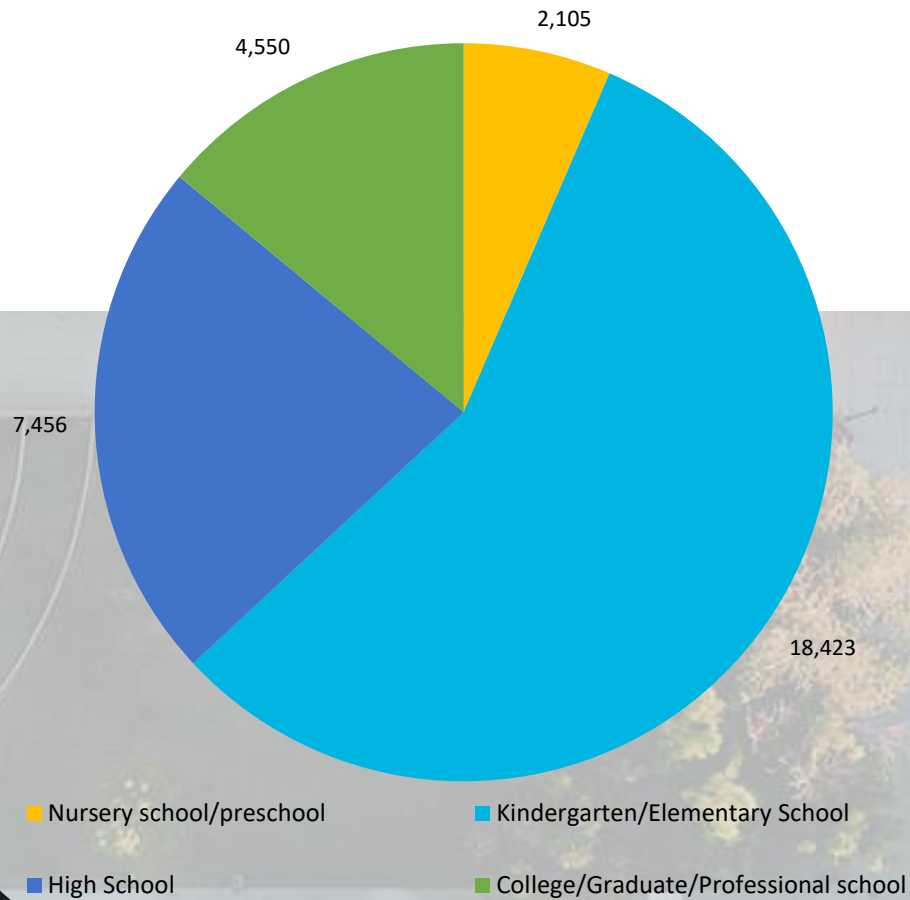
Current Year Estimated Population Age 25+ by Educational Attainment



DISCOVER

Customized Trade Area

Current Year Estimated Population by Enrollment



DISCOVER

Lifestyle Reports

Lifestyle reports allow BIG DATA to be summed up into a simple narrative on the personality of most households.

When asked "Who is York, SC?", often the community leadership describes themselves rather than the dominant personality of the area. Understanding consumer spending behavior based on personality allows Retail Strategies to better align the retail prospects with the purchasing patterns of the consumers in your market.

ESRI Tapestry Segmentation is a geodemographic segmentation system that integrates consumer traits with residential characteristics to identify markets and classify US neighborhoods.

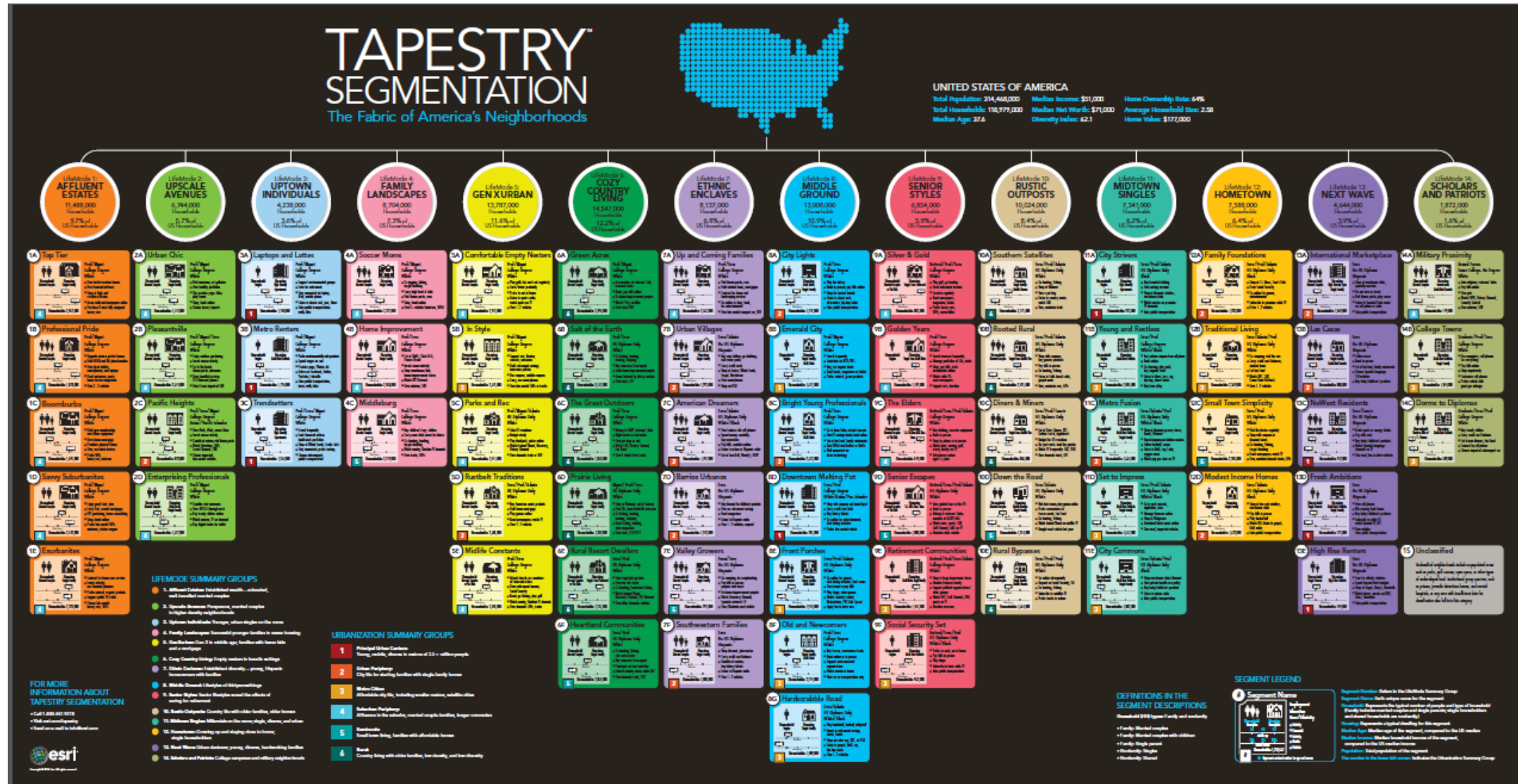
Neighborhoods with the most similar characteristics are grouped together, while neighborhoods with divergent characteristics are separated. Internally homogenous, externally heterogeneous market segments depict

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.

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, townhouse, 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.

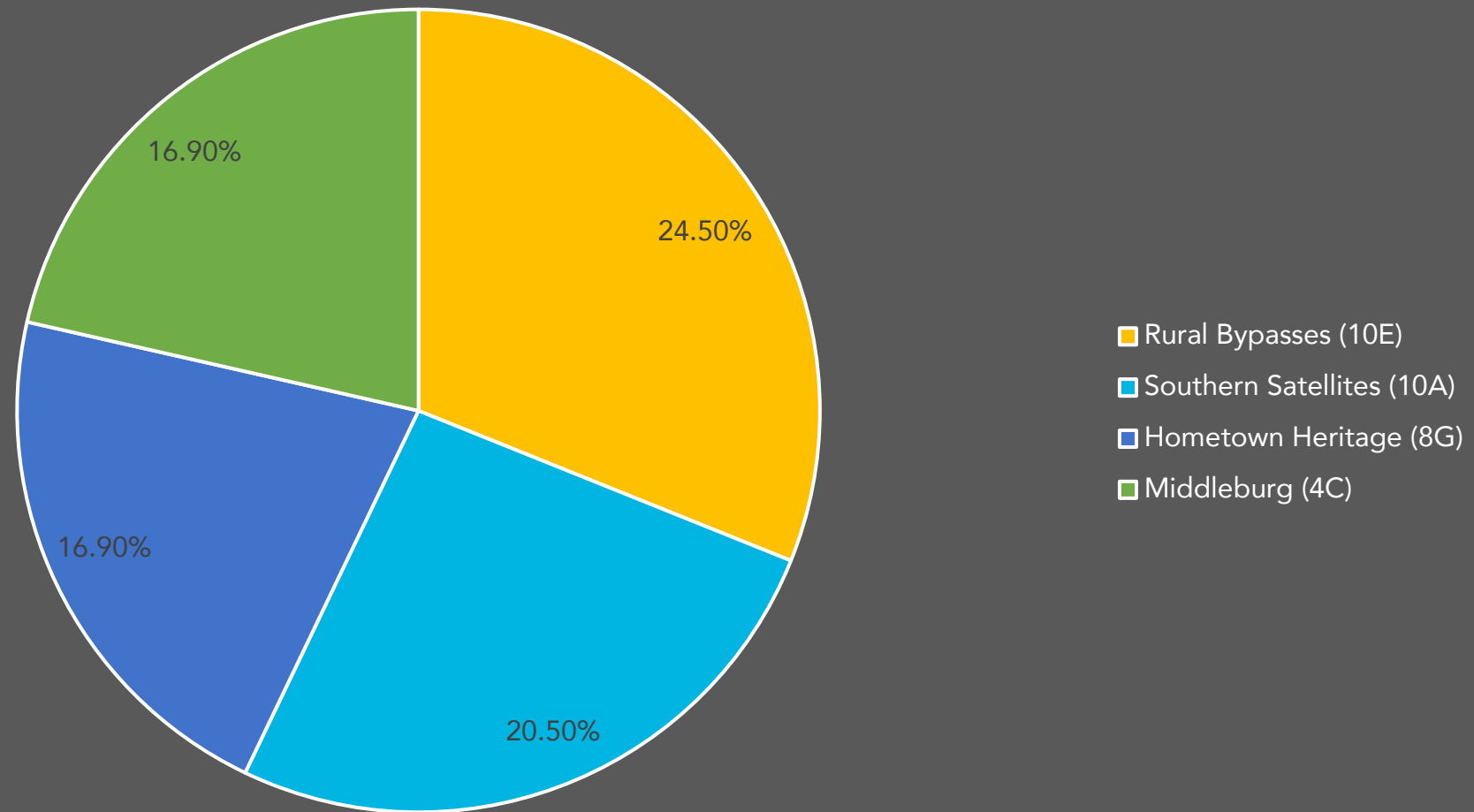
DISCOVER

Research & Analytics



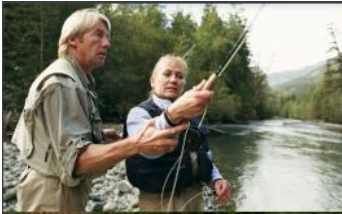
DISCOVER

ESRI Tapestry Segmentation



DISCOVER: PSYCHOGRAPHIC PROFILE

ESRI Tapestry Segmentation



LifeMode Group: Rustic Outposts
Rural Bypasses

10E

Households: 1,646,400
Average Household Size: 2.55
Median Age: 40.4
Median Household Income: \$33,000



LifeMode Group: Middle Ground
Hometown Heritage

8G

Households: 1,507,700
Average Household Size: 2.66
Median Age: 32.4
Median Household Income: \$28,200



LifeMode Group: Rustic Outposts
Southern Satellites

10A

Households: 3,856,800
Average Household Size: 2.67
Median Age: 40.3
Median Household Income: \$47,800



LifeMode Group: Family Landscapes
Middleburg

4C

Households: 3,511,200
Average Household Size: 2.75
Median Age: 36.1
Median Household Income: \$59,800



DISCOVER

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 (leakage) 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 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 the 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 the Bureau of Labor Statistics (BLS). The consumer demand data by the 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.

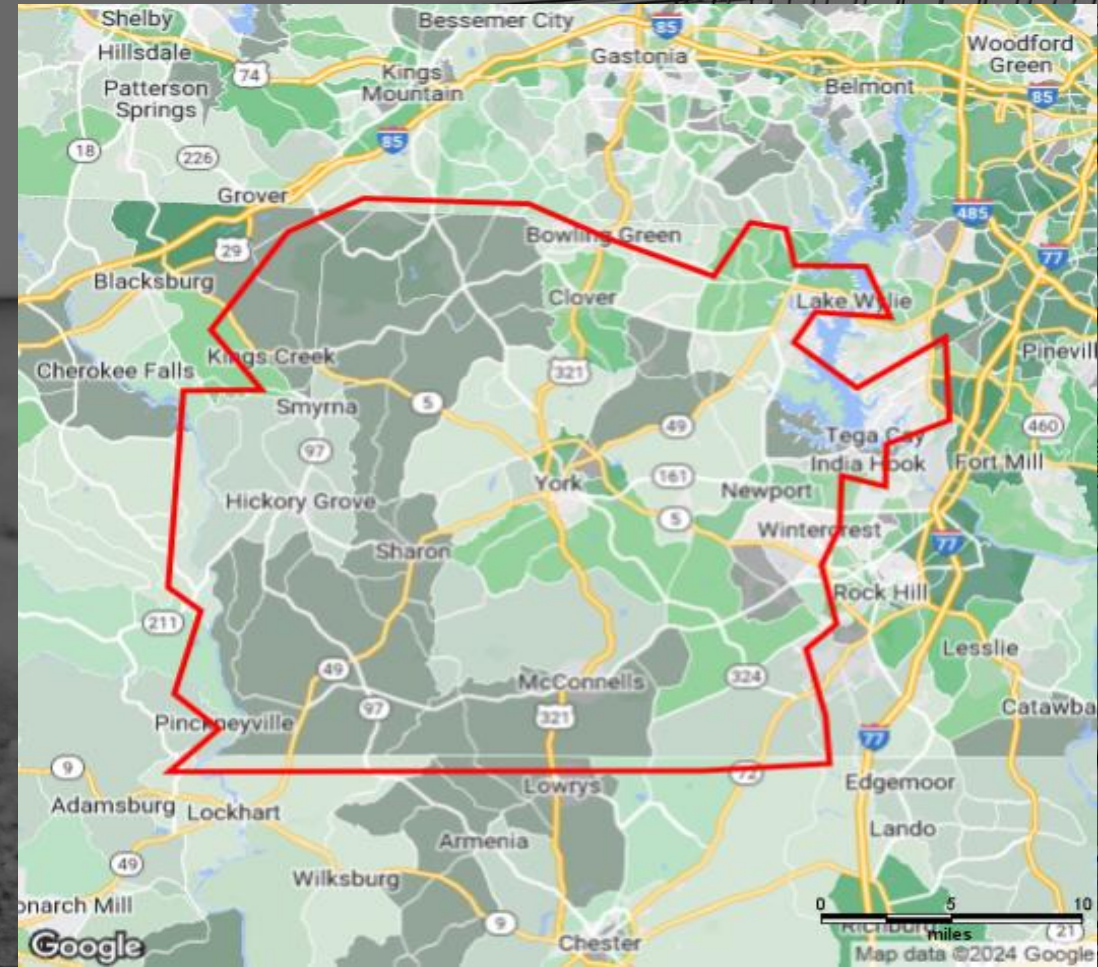
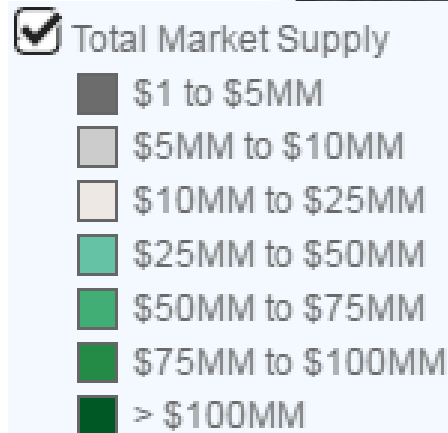
Data is rarely perfect, but proper analysis, it can get us a lot closer to the answer than we would be without it. This is one of several tools used to identify focus categories for recruitment. Our focus in this area is more on the category than the actual dollar amounts.

DISCOVER

Total Market Supply

\$739,454,423

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.

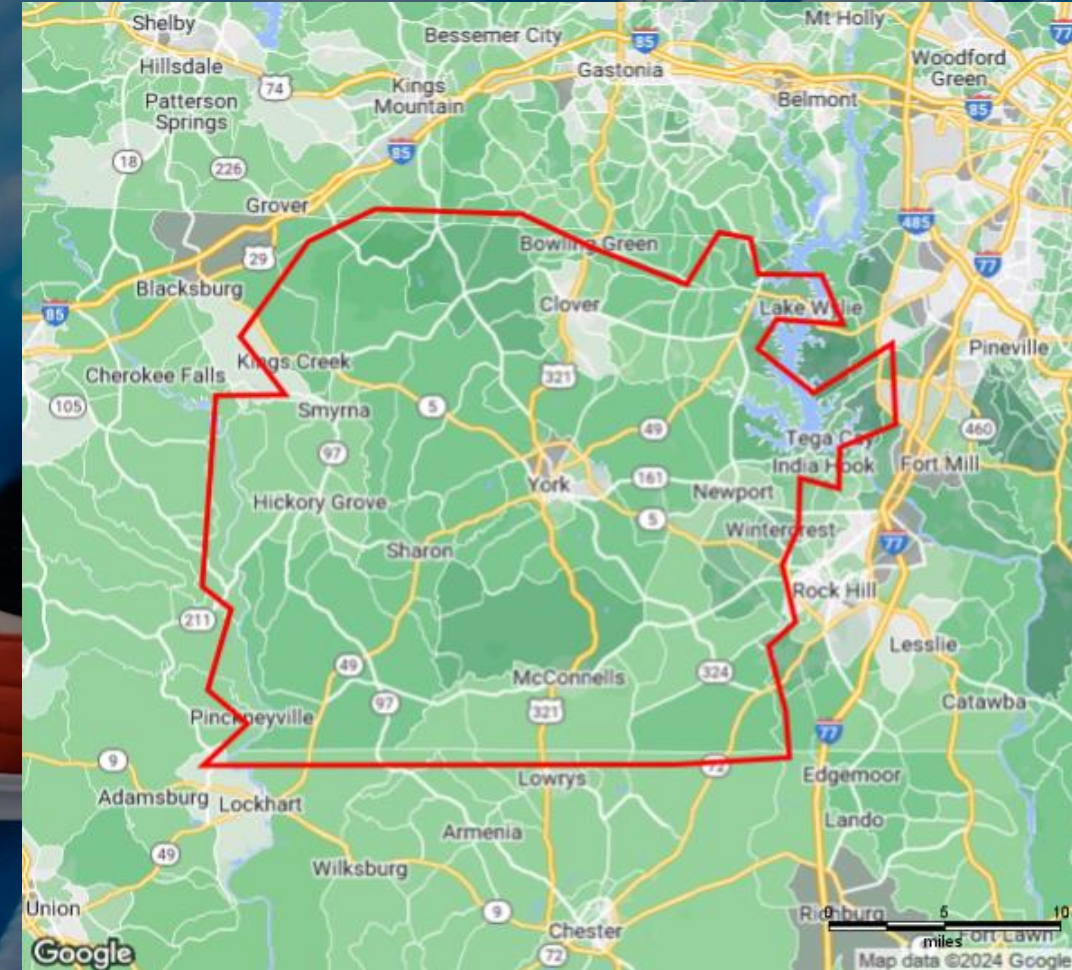


DISCOVER

Opportunity Gap

\$1,112,705,600

The significant market surplus in this trade area showcases its strength as an economic magnet. This Gap Analysis, which covers multiple markets, reveals the regions' ability to attract consumers from beyond its defined boundaries.



DISCOVER

Peer Analysis

Retail Node Comparison Report – 10 Minute Drive Time

Address	Location	State	Residential Population	Daytime Population	Median HH Income	Market Supply
970 E Liberty St	York	SC	20,632	20,491	\$62,172	\$329,678,379
434 S Columbia Ave	Rincon	GA	24,293	17,623	\$72,246	\$384,116,238
511 N Highway 52	Monks Corner	SC	18,852	19,621	\$58,593	\$426,570,157
2350 Robert Smalls Pkwy	Beaufort	SC	29,513	35,421	\$58,307	\$546,860,052
25 Northridge Commons Pkwy	Weaverville	NC	26,008	25,983	\$66,113	\$411,338,324

CONNECT

Boots on the Ground

We identify and record the primary real estate opportunities within the market.

This analysis is performed by licensed real estate professionals with experience in development, leasing, and redevelopment.

Information Collected

- Address
- Property Description
- Coordinates
- Listing Agent (if possible)
- Contact Info for Agent or Owner
- Web Address for Agent or Owner
- Link to Property Info on Agent or Owner's Website
- Google Earth Link to Aerial Photo
- Google Earth Link to Ground Photo
- Total Size of Center (if existing)
- Available Space in Center
- Parcel Size (if vacant land)
- Existing Tenants (if existing)
- Traffic Count at Property
- Summary of Recruitment
- Opportunities Specific to Property
- Specific Prospects for Property
- Overall Strategy for Property
- General Comments

CONNECT

Universal Site Metrics

- Signage/Visibility
- Parking
- Access
- Co-Tenancy
- Traffic



A group of business professionals in a meeting room, looking at documents on a table. The scene is dimly lit, with a semi-transparent dark overlay. The text 'connect' is written in a large, white, lowercase sans-serif font, and 'FOCUS gets RESULTS' is written in a smaller, white, uppercase sans-serif font below it.

connect

FOCUS gets RESULTS

After discovering your community's data and interpreting it into zones for recruitment we need to focus on which retailers and retail categories have the highest odds of success.

CONNECT

Retail Real Estate Process: Terms



Retailers

Corporate Real Estate
Directors
Tenant Representatives
Franchisees
Franchisee brokers

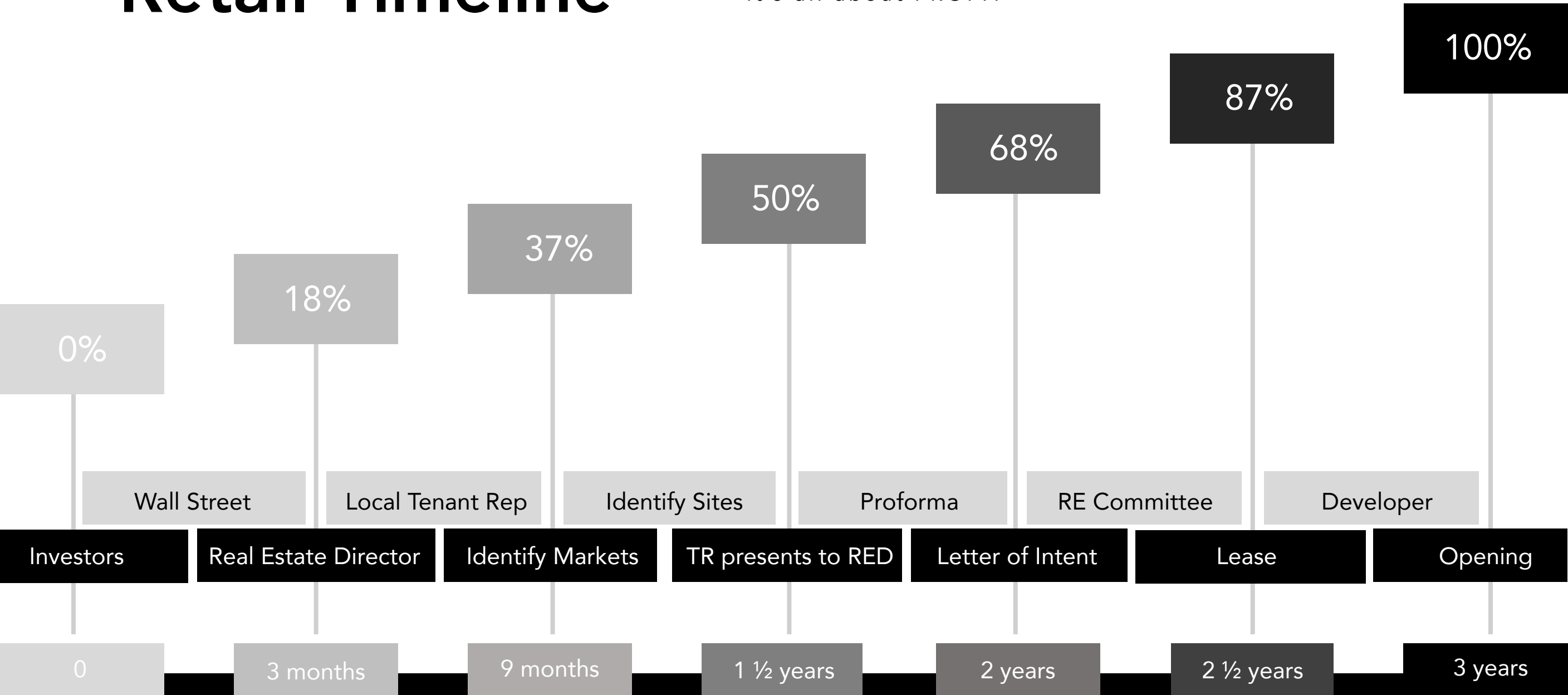
Sites

Property Owners
Brokers
Bank-owned
Local Government
Underperforming Businesses

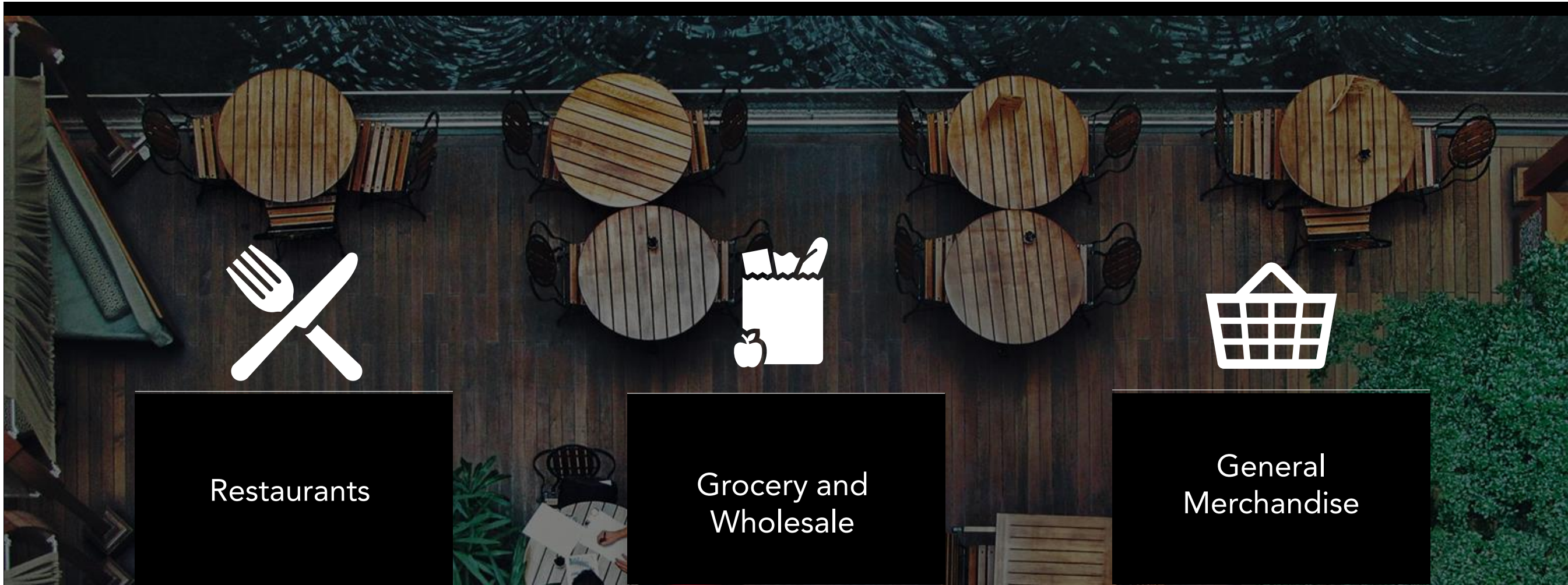
CONNECT

Retail Timeline

- Retailer Drives the Decision
- Small percentage of proposed sites equal new openings
- Long Process
- It's all about PROFIT



Your Top Categories for Recruitment



Restaurants



Grocery and
Wholesale



General
Merchandise

A group of business professionals in a meeting room, looking at documents and charts on a table. The scene is dimly lit, with a semi-transparent white box overlaid in the center containing the text.

advance

FORWARD MOVEMENT

Using our analytical tools combined with our real estate expertise and relationships, our team is positioned to identify opportunities in your market to bring growth to your community.

DISCOVER, CONNECT and

advance

Research,
Strategy, &
Deal-Making

LOCAL BROKERS

DEVELOPERS

RETAILERS & TENANT REPS

PROPERTY OWNERS

COMMUNITY LEADERS

ADVANCE

Reporting Information

Updates through Basecamp to a single Contact Person who disseminates information to the Community leaders.

- Retail Assets
- Retail Webinars
- National Retailers
- Industry Experts
- Broker Representatives
- Recruitment Tools
- Marketing Flyer
- Conference Recruitment

The screenshot shows a Basecamp project dashboard for 'York, SC Retail Recruitment'. The interface is dark-themed and includes a navigation bar at the top with links for Home, Lineup, Pings, Hey!, Activity, My Stuff, and Find. The main content area is divided into several sections:

- Project Notes & Updates:** A list of recent updates, including 'Retail Recruitment Update', 'Retail Specialists Housing Demand Survey - Request for Feedback', 'York, SC - Full Data & Demographic Package', 'ARPA Funds Webinar', and 'ICSC Las Vegas Conference Recap Report 2024'.
- To-Do Lists:** Two sections: 'Marketing Requests' with tasks like 'Upload the official seal of City/County/Parish to Client Files' and 'Upload high res photo to Client Files for marketing guide'; and 'To-Do List - Recruitment Team' with a task 'Onboarding Client'.
- Calendar:** A calendar view showing an event for 'WED, OCT 16' titled 'ICSC Southeast - Atlanta, GA'.
- Client Files:** A section containing three cards: 'Deliverables', 'Data & Research', and 'Market Visit'.
- Internal Files:** A section containing three cards: 'Partnership Agreement', 'Data & Research', and 'Deliverables'.
- Project Activity:** A section at the bottom showing the date 'Wednesday, July 31'.

ADVANCE

Marketing Guide

You need a document that showcases critical market intelligence, real estate assets, and compelling data that speaks the retail real estate language. This should include an aerial map with the national retailers plotted and traffic counts.

retail strategies

BEST USED?

Prim

Success than wo

Yes, ente the or n

We com succ

retail strategies

MARKET GUIDE

City, State

Demographics

20 min drive time

Custom Trade Area

20 min drive time

17,466 population	7,022 # of households
19,193 metro population	\$36,300 Household income (median)
41.4 avg age	\$51,000 Household income (average)

City Name

William Tannley, Portfolio Director
wtannley@retailstrategies.com
t: 205-935-5703
f: 205-746-4724

City Official Name, Director
director@cityname.com
t: 205-935-5703
f: 205-746-4724

DISCOVER

GAP Analysis

DISCOVER

Customized Trade Area

2022

Yes, We're Open

retail strategies

YOUR TEAM

Who We Are

retail specialists

OUR SUCCESS

New

Robert Jo

Meed Sis

Erill Gull

DATA & ANALYTICS

Market Analysis

YOUR RETAIL STRATEGY

Retail Recruitment



Las Vegas
New York City
Dallas
Atlanta
Orlando

New Orleans
Charlotte
Nashville
San Diego
Scottsdale

Austin
Chicago
Virginia D.C

ADVANCE

Conference Recruitment

We attend 15+ conferences per year to recruit retail to specific sites in our communities.



LACY BEASLEY
President, Retail Strategies



December 2021



Ongoing Effort

Strategy Update

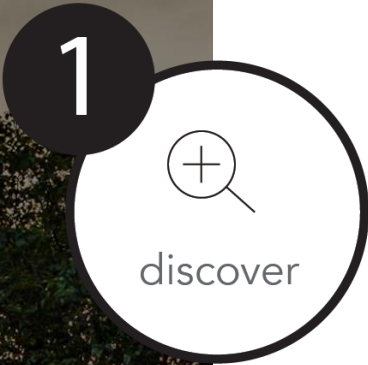
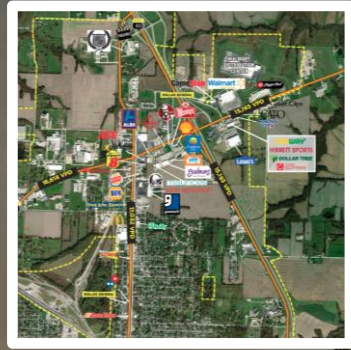
Continuously improving our efforts to maximize the retail potential in your community

Retail Expansion & Trends

Appropriately position your community
Update Municipal leaders on the latest in retail

On Demand Reporting

Your research concierge

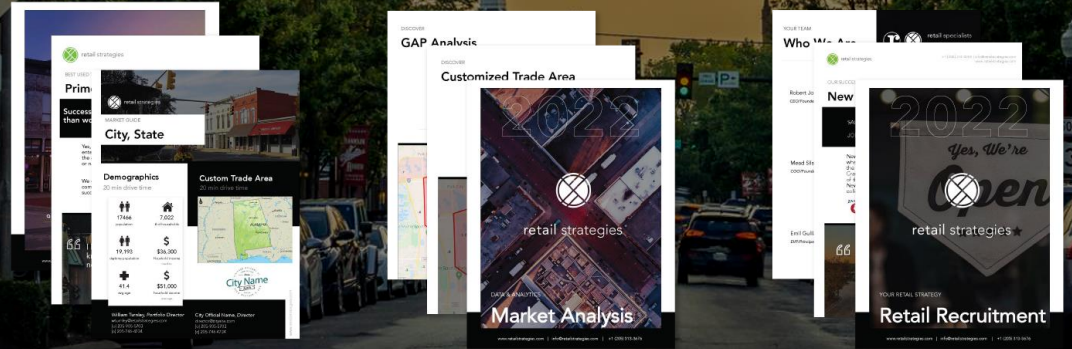


RECAP

The Process

After **discovering** and developing **connections** in the community and industry we proactively **advance** your community.

- We contact developers, retailers, tenant representatives, and franchisee groups - regionally and nationally.
- We make direct and indirect connections through conferences, in-person meetings, phone calls, and emails.
- We coordinate and communicate our efforts regularly with local brokers, property owners, and municipal staff
- We follow industry trends as well as changes in your local market to adjust our strategy and improve our efforts to maximize the retail potential in your community





retail strategies

THANK YOU

York, SC

