



CITY OF GROVELAND
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"The City with a future, watch us grow!"

Groveland City Council
City Manager Report
July 7, 2015

Pending Action Items:

- In lieu of the City Council discussion during goal setting regarding its desire to develop and implement Retail strategies that focus on prospects that specialize in restaurants, bowling alley, movie theater and an additional grocery; I would like the City Council to review a proposal that was presented to Staff in May. At this time I am asking City Council review the attached proposal for background purposes only. Since this was a priority established in our council goal setting, staff will be looking for budget funding direction for services of this nature in the coming budget workshops. **This is Homework Only.**
- Goal Setting was well received; however, due to the need for an additional day we over budget \$2,046.23 which equates to nine additional hours. This will also include a follow-up meeting with staff. **Unless otherwise directed by City Council the City Manager will approve the over-budgeted amount.**

Report from the Desk of the City Manager:

- Conflict Management Training - Special Thanks to Police Chief Tennyson and Human Resource Manager Christy Higdon for coordinating and facilitating two days of classes on conflict management, workplace violence, sexual harassment and customer service training. This training program was mandatory for all city employees. The training was delivered very professionally and was well received.
- The City Manager's Office is nearing reaching MOU agreement with CaptiveAire which anticipates expanding their current manufacturing plant by approximately 36,000 sq feet. This expansion is expected bring an additional 8 full time employees; thus, rising the potential plant capacity to 80 employees. Any Development Agreement reached must have City Council's Approval to be finalized. The investor / developer /owner understands that any incentives offered or temporarily held during the development agreement negotiation can be denied, changed or accepted as presented by the City Council.

Projects in the Funnel / Staff work Room: (Written only)

- Sunshine Well Drill (Lower Floridian)
- Fishing Pier (grants committee and/or budget process)
- ~~Economic Development Ordinance~~
- Police / Community Citizen Advisory Board
- Landscape / Conservation Plan
- ~~Arranging City Council Goal Setting~~
- ~~City Bi-Annual News Letter~~
- ~~Hwy 27 Welcome Sign (basic)~~
- Youth Council program / budget funding
- Water Rate / Water Issue Workshop
- ~~Inter-local Home Investment Partnership~~



RETAIL STRATEGIES PROPOSAL TO:

Groveland, FL

RETAIL RECRUITMENT



We make retail happen.

Retail Strategies is a leading national advisory firm focused on retail market analysis, strategic planning, retail recruitment and development.

Retail Strategies was formed to help cities take a comprehensive approach to retail recruitment. We go beyond research, recognizing the need for our clients to have a partner involved in the execution of a specific Retail Recruitment Strategy.

Community leaders, economic development authorities and Chambers of Commerce rely on our experienced team to provide tailored solutions to achieve retail growth and success.

OUR PROCESS



- Market Analysis
- Retail GAP Analysis
- Retail Peer Identification & Analysis

- Catalog Available Properties
- Identify Retail Prospects
- Develop Recruitment Plan

- Develop Marketing Materials
- Proactive Recruitment of Retail Prospects
- Monthly Reporting to City
- Representation at National & Regional Conferences

YOUR RESULTS



A FEW OF OUR SUCCESS STORIES



WALMART MARKET - STATESBORO, GA

In 2013, the City of Statesboro engaged Retail Strategies to assist their efforts in pro-actively recruiting retail. As part of the Retail Strategies process, we determined that the student population of Georgia Southern University had not been a focus of past research and recruitment initiatives. By incorporating the 21,000 student's spending potential with a regional trade area focus, we identified a substantial grocery GAP in the market and reached out to multiple grocery concepts at ICSC meetings and through follow-up phone calls. In June of 2014, WMT announced and began construction of a new Neighborhood Market near the GSU campus that will also serve the greater Statesboro population. At least one and possibly two additional national grocery chains we targeted are expected to announce expansion plans in Statesboro in the coming months.



TJ MAXX - LAGRANGE, GA

LaGrange officials made initial contact with TJ Maxx at ICSC Vegas in 2011 and received a positive response but were having difficulty determining the timing of TJ Maxx coming to the market. When Retail Strategies was hired in October 2012 to assist the city's retail recruitment efforts, we immediately reached out to TJ Maxx and the targeted property contacts and helped facilitate the decision process through research and direct communication with the retailer. TJ Maxx opened in LaGrange during the fall of 2013.



HOBBY LOBBY - JASPER, AL

Hobby Lobby is part of a shopping center redevelopment in Jasper that also includes TJ Maxx, Petco and Shoe Carnival. This was a project originally conceived several years prior to Retail Strategies engagement in Jasper. The U.S. recession and the project economics caused this project to be shelved. Immediately after the City of Jasper retained Retail Strategies, we reached out to the developer and, working with the city, we were able to quantify the economic gap and design an incentives package that was a win/win for the developer and the city.



CHICK FIL A - LAURENS COUNTY, SC

Chick-Fil-A has owned land in Laurens, SC for three years but there had been no official timeframe to open a location on their site in Laurens. After leveraging contacts to Chick-Fil-A and continued follow up, Chick-Fil-A has announced to open a location in Laurens, SC in 2015.



FIREHOUSE SUBS - EDMOND, OK

One of the target GAPS in our City of Edmond research is Restaurants. Firehouse was targeted early on in the process. The Retail Strategies Client Manager for Edmond reached out to Firehouse at multiple ICSC meetings to market Edmond as an opportunity and then followed up with specific sites meeting the restaurant's criteria.



DOLLAR TREE - TULLAHOMA, TN

Dollar Tree is relocating and expanding in the Tullahoma market. While their current store was performing well, they expect, with the relocation, that the trend will continue with an uptick in sales. This is a winning scenario for both Dollar Tree and Tullahoma. Materials provided by Lacy Beasley at Retail Strategies and the city's business friendly environment assisted Dollar Tree in this process.



LANE PARKE - MOUNTAIN BROOK, AL

Retail recruitment, market analysis and leasing services were provided to the owner of a 1950's-era shopping center and apartment complex, which is being redeveloped into a high-end, mixed-use development. Retail Strategies completed the research and made a presentation to the city to rezone the 27 acre site to PUD. Research uncovered an opportunity to recruit luxury retail tenants, most of which are locating in Alabama for the first time. Lane Parke will feature over 160,000 square feet of luxury retail, 25,000 square feet of office space, a 100 room boutique inn, and 320 luxury residential units.



HARBOR FREIGHT - LAKE CITY, FL

In 2013, Retail Strategies was engaged by the Columbia County-Lake City Chamber of Commerce to provide retail market research and retail recruitment services. Research revealed an \$11.3M gap in the trade area for building materials stores. As part of the strategic planning process, the Retail Strategies team identified a number of retail prospects to fill the gap and immediately began calling on them to discuss the market opportunity. One of the retail prospects, Harbor Freight Tools, expressed strong interest in the market in early 2014. By June of that year, the retailer had contracted with a developer to open a new store in Lake City.



ALDI - HUEYTOWN, AL

Within a week of being engaged by the City of Hueytown, the second largest grocery store filed for bankruptcy and chose to auction all store locations. Retail Strategies reached out to the local Aldi developer and suggested, based on our research, that the acquisition of this grocery location made sense for Aldi to enter the market. In addition to Aldi locating in Hueytown, the property will also support two new outparcel restaurants.

A photograph of a young couple walking past a store window. The woman is on the left, wearing a light-colored trench coat, blue jeans, and white sneakers, carrying a purple and a red shopping bag. The man is on the right, wearing a red and white plaid shirt, grey pants, and brown shoes, carrying a tan shopping bag. A semi-transparent white box is overlaid on the center of the image, containing the text for the table of contents.

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Executive Summary

Retail attraction and retention is a primary goal for communities across the country. To accomplish this communities in the past have spent valuable time and public funds to hire a consultant to attract retail only to be left with research reports, a list of retailers, and limited guidance on the actual process of recruiting prospects to their community.

Robert Jolly and Mead Silsbee, brokers and developers in Birmingham, AL, saw the opportunity to partner with Chuck Branch, an expert data analyst, to take their years of research and retail real estate experience to develop a firm to take a holistic approach to retail recruitment. Their vision was build a team and provide a service that would allow communities the opportunity to have retail real estate professionals develop and execute a tailored strategic plan on behalf of their community.

Over the past four years Retail Strategies has developed a team of thirty highly motivated and skilled retail real estate professionals from a variety of backgrounds including marketing, research, analytics, sales, communication and commercial real estate to provide an industry leading service. Retail Strategies has offices in Birmingham, AL and Fort Worth, TX Retail Strategies is working with 115 Clients in Twenty States.

The model is both strategic and comprehensive. By combining research, analysis, Strategic Retail Recruitment Plan, marketing materials, conference representation, and pro-active retail recruitment, our firm has helped over a hundred communities define and execute against specific opportunities.

The World of Retail is a dynamic and evolving market. Due to the nature of our business, Retail Strategies plans are not static documents. The Strategic Retail Recruitment Plan is a dynamic document and provides a starting line for the partnership. The plan identifies where we are today and where we want to be in the short and long term.

Following the presentation of the Strategic Plan the Retail Strategies team goes to work on your behalf executing against the opportunities defined in the Strategic Retail Recruitment Plan and the new opportunities that arise on a daily basis to create tangible results for your community.

The following pages of this document further define and explain our process.

Team Description

Our Difference

Our team of twenty-nine is unparalleled within the industry. Our firm is the only firm in the Country to assign dedicated professionals to execute against the opportunities within your markets. These dedicated professionals have roles and responsibilities that complement each other so we can create the desired results within your markets. These roles and responsibilities include Vice President of Retail Recruitment, Account Executive, Client Manager, Senior Retail Recruitment Coordinator, Junior Retail Recruitment Coordinator, Marketing Assistants, and a Data and Research Analysis Professional.

Our Expertise

Our team has a combined 125 years of Retail Real Estate Experience. In addition to our retail real estate expertise, our team consists of self-motivated professionals throughout a variety of disciplines that execute against opportunities daily to create tangible results for our clients.

Our Promise

Our promise to our clients are:

- 1) Progress Updates
 - ✓ Every call, email, face-to-face meeting, or trade show meeting is logged and recorded to the Retail Prospect list and uploaded to Basecamp each month for your review.
 - ✓ Interaction with the Client Manager, Retail Recruiters, and other members of your team.
- 2) Dynamic Performance
 - ✓ Our team will react to the rapidly changing retail environment throughout the course of the engagement
 - ✓ Our focus is to daily identify newly announced expansions, closures, and relocations to position our clients appropriately.
 - ✓ On-Demand Reporting
- 3) Provide Answers
 - ✓ Provide feedback and direction on barriers to entry when retailers turn down a site
 - ✓ Provide feedback and direction for entrepreneurial opportunities
- 4) Your Success is Our Goal

Groveland Core Team

Built for You

The Core Team consists of marketing, research, and real estate professionals who will work hand in hand with you to identify and achieve results. Our firm has carefully devised a structure that can be implemented in to your community to provide tailored solutions to this unique engagement.

The Groveland Core team consists of our three Principals, Executive VP of Retail Recruitment, Client Manager, Senior Retail Recruitment Coordinator, Account Executive, Marketing Assistants, and Research and Analytics Specialists. The responsibilities of your core team encompass all aspects of retail recruitment and the individuals working with Groveland will each utilize their unique skill set to execute on behalf of the community.

Retail Strategies Team

Leverage

In addition to your Core Team, Retail Strategies puts connections made from a National perspective to work for your community. Investors, developers, and retailers are looking for the right sites Nationwide. Thus, our firm will get your market opportunities in front of the decision makers to make retail happen.

“We Make Retail Happen”



Our Process

Research:

- Identify Groveland market Retail Trade Areas using political boundaries, drive times and radii and custom boundary geographies
- Perform Market & Retail GAP Analysis for each trade area (Leakage and Surplus)
- Provide Consumer Attitude and Behavior Analysis
- Conduct Retail Peer Market Analysis
- Competition analysis between Groveland market trade area(s) and surrounding competitive communities
- Cannibalization Analysis (Distance Tolerance) for all recommended retail prospects between nearest existing locations and Groveland
- Tapestry Lifestyles – Psychographic Profile of Trade Area / Market Segmentation Analysis
- Thematic Mapping and Aerial Imagery by trade area
- Retail Competitor Mapping/Analysis
- Market Maximization Summary and Strategic Leasing Plan
- Analysis of future retail space requirements in relation to the retail market analysis, the market's growth potential and trends in the retail industry
- Identification of Retail Prospects to be targeted for recruitment
- Retailer Recruitment and Execution of the Retail Strategic Plan
- Updates on Retail Industry Trends
- Custom On-Demand Demographic Research – Historical, Current, and Projected Demographics – to include market trade areas by radius/drive-time, and custom trade areas associated with Groveland

Boots on the Ground Analysis:

- Identify/Evaluate/Catalog Priority Commercial Properties for Development, Re-development and higher and best use opportunities
- Identification of Priority Business Categories for Recruitment and/or Local Expansion
- Perform Competitive Analysis of Existing Shopping Centers and retail corridors

Retail Recruitment

- Pro-Active Retail Recruitment
- ICSC Representation
- Monthly Updates

Further Explanation and Examples to Follow.

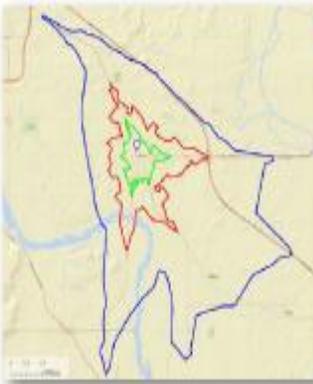
Quantitative Research

We Speak Retail

Our research solutions are not “one size fits all”. Each City, neighborhood, or retail trade area requires unique analysis based on numerous factors including natural boundary areas, retail tenant mix, travel times, radius areas, and existing sites/buildings. Our research focuses on identifying the data points that are most likely to influence the site location decisions of retailers. Speaking their language to provide realistic expansion opportunities. In addition, we provide thematic maps, aerial photos, asset maps, and customized reports by retail concept.

market analysis: coweta

Retail Strategies



Category	3 Mile Drive Time	6 Mile Drive Time	10 Mile Drive Time
Population 2014	4,339	7,219	14,793
Population 2019	4,403	7,414	15,403
Median Household Income 2014	\$42,310	\$45,108	\$52,907
Median Household Income 2019	\$40,320	\$51,200	\$57,834
Median Disposable Income 2014	\$30,422	\$37,036	\$42,902

market analysis: coweta

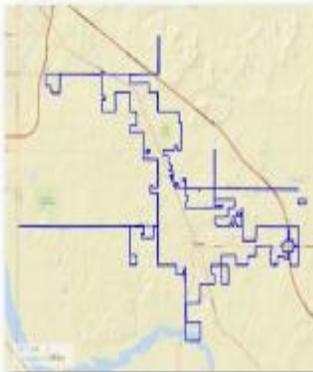
Retail Strategies



Category	3 Mile Radius	6 Mile Radius	10 Mile Radius
Population 2014	10,102	16,006	26,707
Population 2019	10,450	16,700	27,982
Median Household Income 2014	\$50,939	\$54,034	\$59,143
Median Household Income 2019	\$54,949	\$59,275	\$67,316
Median Disposable Income 2014	\$40,709	\$44,051	\$50,143

market analysis: coweta

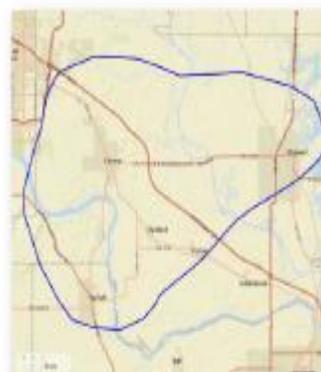
Retail Strategies



Category	City Boundary
Population 2014	10,272
Population 2019	10,684
Median Household Income 2014	\$51,409
Median Household Income 2019	\$56,070
Median Disposable Income 2014	\$41,499

market analysis: custom

Retail Strategies



Category	Custom Trade Area (99.53 Square Miles)
Population 2014	38,330
Population 2019	41,134
Median Household Income 2014	\$51,823
Median Household Income 2019	\$57,750
Median Disposable Income 2014	\$41,821

TAPESTRY SEGMENTATION

The Fabric of America's Neighborhoods



UNITED STATES OF AMERICA

Total Households: 119,143,000	Median Income: \$42,000	Total Population: 312,400,000
Total Households: 17,917,000	Median Income: \$37,000	Average Household Size: 2.48
Median Age: 34.2	Median Rent: \$617	Total Value: \$1.17 TRILLION

What is Tapestry?

Tapestry helps you understand your customers' lifestyle choices, what they buy, and how they spend their free time. Tapestry classifies US residential neighborhoods into 67 unique segments based on demographic and socioeconomic characteristics. That's how you get more insights so you can identify your best customers and underserved markets.

“Identify Where the Desired Consumer is Located”

14B LifeMode Group: Scholars and Patrons
College Towns



Households: 1,104,000
Average Household Size: 2.12
Median Age: 24.2
Median Household Income: \$20,000

WHO ARE WE?

Almost all the members of College Towns are enrolled in college, while the rest work for college or the services that support it. Students have jobs of various kinds, but the common activity and job involves jobs for teaching and grade. Students that are not working in their area of study tend to have regular jobs and work on the side before they graduate. They typically graduate with a bachelor's and all go on to all aspects of life including shopping, school work, work, social events, and entertainment. College Towns are all about new experiences, professional work and social and educational their lives.

OUR NEIGHBORHOOD

- There are mostly households and many students living close to each other.
- The segment is a mix of densely populated student housing and dorms with HOV households.
- HOV houses, low rent apartments comprise half of the housing stock.
- Close to many of the households are other occupied with use in an existing model.
- Overhead houses are single family, mostly occupied by HOV residents who own their homes.
- The median lot and potential density.

SOCIOECONOMIC TRAITS

- They tend to consume more in highly populated.
- They do not make healthcare goods, nor do they use a doctor regularly.
- They tend to agree with the labor before the other.
- They prefer environmentally friendly products and vehicles that get good gas mileage.
- They are heavily influenced by celebrity endorsements and trends in fashion.
- They like getting that car to drive while a make that is unique.
- They have liberal political views.



14B LifeMode Group: Scholars and Patrons
College Towns



AGE BY SEX

Median Age: 24.2 (20-37)



RACE AND ETHNICITY

The Diversity Index measures the probability that two randomly selected people from the population will be of different races or ethnicities. The index ranges from 0 (no diversity) to 100 (maximum diversity).



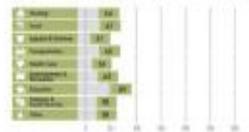
INCOME AND NET WORTH

The median income and household net worth, relative to the national average, are shown by the bars. The bars are color-coded by income level: red for low, yellow for middle, and green for high.



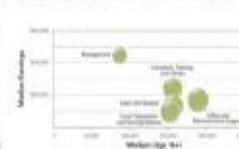
AVERAGE HOUSEHOLD BUDGET INDEX

The index compares the average amount spent in the market for each product category to the average amount spent in the market for each product category in the US. The index ranges from 0 (below average) to 100 (above average).



OCCUPATION BY EARNINGS

The bar chart shows the highest median income in the market for each occupation category. The bars are color-coded by income level: red for low, yellow for middle, and green for high.



14B LifeMode Group: Scholars and Patrons
College Towns



MARKET PROFILE

- Close to a large and profitable DMU hub.
- Watch movies and TV programs online, MTV and Comedy Central on TV.
- Use the Internet for social media connections, shopping, paying bills, and downloading music.
- Have cell phones only (no landline) and enjoy streaming music.
- Popular activities: backpacking, hiking, and fishing.
- Go use the internet and use for news.

HOUSING

Median home value is calculated by dividing the average price of all homes in the market by the number of homes. The average price is calculated by the housing type and the size of the home.



POPULATION CHARACTERISTICS

Age distribution, average annual income, average household size, and average household size are shown by the bars. The bars are color-coded by income level: red for low, yellow for middle, and green for high.



ESRI INDEXES

The ESRI Indexes are a set of three indices that measure the relative density of the population, the relative density of the population, and the relative density of the population.



14B LifeMode Group: Scholars and Patrons
College Towns



SEGMENT DENSITY

The map shows the density of the population in the market for each product category. The density is measured by the number of households per square mile.



GAP Analysis

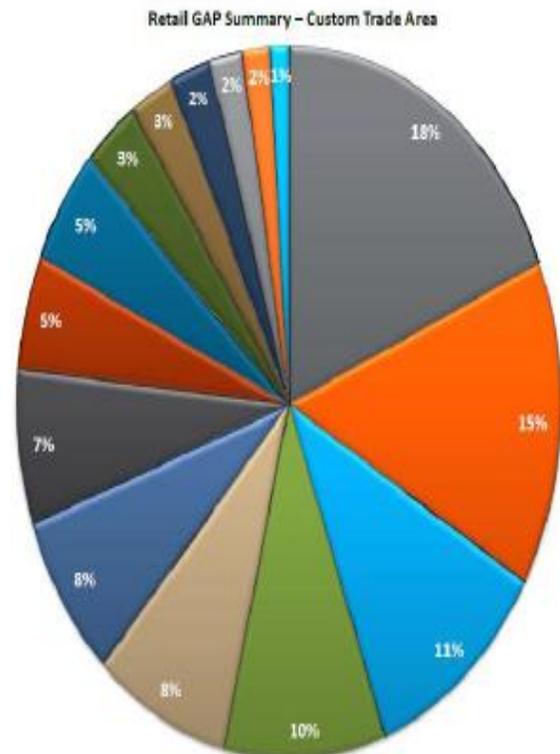
What is GAP Analysis?

The Retail GAP Analysis examines the quantitative aspect of the community's retail opportunities. It is a guide to understanding retail opportunities but it is not an analysis that indicates unconditional opportunities. The analysis is sometimes called "a leakage report" or "a supply and demand analysis" and can aid in the following:

- Indicating how well the retail needs of local residents are being met
- Uncovering unmet demand and possible opportunities
- Understanding the strengths and weaknesses of the local retail sector
- Measuring the difference between actual and potential retail sales

gap analysis

Retail GAP Summary - Coweta OK Custom Retail Trade Area	
Retail Stores	Opportunity GAP
General Merchandise Stores	\$25,645,757
Supermarkets, Grocery Stores	\$20,515,468
Home Centers/Outdoor Power Equipment Stores	\$15,107,091
Pharmacies & Drug Stores	\$13,370,839
Full-Service Restaurants	\$11,225,960
Limited-Service Restaurants	\$10,440,421
Home Furnishing, Furniture, & Household Appliance Stores	\$9,754,442
Family Clothing Stores	\$7,205,458
Office Supplies, Stationery, Gift Stores	\$7,116,015
Sporting Goods Stores	\$4,650,165
Automotive Parts/Accessories	\$3,535,335
Health & Personal Care Stores	\$3,396,849
Women's Clothing Stores	\$2,720,538
Shoe Stores	\$2,287,086
Cosmetics, Beauty Supplies, Perfume Stores	\$1,537,731
Total	\$138,509,155



Consumer Expenditure, Attitudes, and Behaviors

You're Market in Action

Our detailed consumer attitude, expenditures, and behavior data allows us to drill down to the consumer level and understand their preferences and likelihood to purchase products and services. Local retail businesses can use this data to better understand the product and service mix needed to grow their company and capture spending that may be leaving the immediate trade area.

Over 1,000 Variables that Cover 95% of Household Spending



Health and Beauty Market Potential

City of Bixby, OK 3-5-10 Minute Drive Time
 Bixby, Oklahoma, United States
 Drive Time: 3 minute

Latitude: 35.94204
 Longitude: -95.88332

Demographic Summary	2014	2019
Population	2,523	2,848
Population 18+	1,862	2,124
Households	987	1,118
Median Household Income	\$38,090	\$44,900

Product/Consumer Behavior	Expected Number of		
	Adults	Percent	MPI
Typically spend 6+ hours exercising per week	363	19.5%	86
Typically spend 3-5 hours exercising per week	384	20.6%	95
Typically spend 1-2 hours exercising per week	371	19.9%	99
Exercise at home 2+ times per week	435	23.4%	82
Exercise at club 2+ times per week	185	9.9%	77
Exercise at other facility (not club) 2+ times/wk	134	7.2%	93
Own elliptical	57	3.1%	77
Own stationary bicycle	95	5.1%	91



Pets and Products Market Potential

City of Bixby, OK 3-5-10 Minute Drive Time
 Bixby, Oklahoma, United States
 Drive Time: 3 minute

Latitude: 35.94204
 Longitude: -95.88332

Demographic Summary	2014	2019
Population	2,523	2,848
Population 18+	1,862	2,124
Households	987	1,118
Median Household Income	\$38,090	\$44,900

Product/Consumer Behavior	Expected Number of		
	Households	Percent	MPI
HH owns any pet	567	57.4%	108
HH owns any bird	28	2.8%	101
HH owns any cat	282	28.6%	126
HH owns any dog	403	40.8%	103
HH owns 1 cat	153	15.5%	125
HH owns 2+ cats	129	13.1%	124

Peer Analysis

What is Peer Analysis?

Retailers have a tendency to locate in similar communities and/or trade areas. By identifying similar communities from a demographic and business scope, we can analyze those retailers who have shown a propensity to locate in these peer areas.

peer analysis

| Retail Strategies

City	State	Population (2010)	Population (2014)	Population (2019)	Households (2014)	Average Household Income (2014)	Total Retail Expenditures (2014)
Spearfish	SD	10,526	10,814	11,155	4,884	\$59,518	\$102,724,537
Carroll	IA	10,103	10,203	10,487	4,413	\$58,514	\$91,244,335
Brownfield	TX	9,657	9,821	10,240	3,250	\$60,818	\$67,663,700
Coweta	OK	9,384	9,573	10,049	3,636	\$69,049	\$75,468,198
Grinnell	IA	9,378	9,415	9,491	3,677	\$60,129	\$77,263,404
Augusta	KS	9,274	9,326	9,596	3,790	\$58,142	\$78,123,801
Becliff	TX	8,619	9,304	10,179	3,294	\$58,389	\$67,712,156
Perryton	TX	8,841	8,987	9,198	3,149	\$58,258	\$64,806,042
Fort Stockton	TX	8,368	8,439	8,668	3,049	\$60,209	\$64,195,628
Bernalillo	NM	8,320	8,372	8,778	3,088	\$59,480	\$64,209,649
Bloomfield	NM	8,112	8,078	8,283	2,930	\$58,458	\$60,536,935
Webster City	IA	8,070	8,064	8,089	3,485	\$58,363	\$72,025,610



Boots on the Ground Analysis

What Does a Retailer See?

Purpose of this analysis is to:

- Identify/Evaluate/Catalog Priority Commercial Properties for Development, Re-development and higher and best use opportunities
- Identification of Priority Business Categories for Recruitment and/or Local Expansion
- Perform Competitive Analysis of Existing Shopping Centers and retail corridors



development opportunity

State HWY 51
Multi-Use Development

- 3,055,743 OLA
- Multiple Retail Opportunities
 - Grocery
 - Restaurant
 - Other Retail

focus properties

Number on Aerial	Name	Address	City	State
1	Land North of Vassar	11521 S Highway 51	Coweta	OK
2	Land Between Vassar and Weather Center	11222 S Highway 51	Coweta	OK
3	Weather Break Center	11119 S Highway 51	Coweta	OK
4	Coweta Crossing	11059 S Highway 51	Coweta	OK
5	Land North of Mugginking	11001 S Highway 51	Coweta	OK
6	Land North of Dolar General	11037 S Highway 51	Coweta	OK
7	Oak Grove Shopping Center	11190 S Highway 51	Coweta	OK
8	Coweta Mart	11017 S Highway 51	Coweta	OK
9	Vassar Building South of Vassar	10241 S Highway 51	Coweta	OK
10	Land West of Phillips Rd	3045 S Highway 51	Coweta	OK
11	FTD Malls Building	13222 S Highway 51	Coweta	OK
12	Land	11381 S Highway 51	Coweta	OK
13	Land	6 Highway 51 & N.24th Street	Wagoner	Oklahoma

Boots On the Ground

information collected on **BOG** tour ...

- Address and Property Description
- Coordinates
- Listing Agent if applicable
- Contact info for Agent or Owner
- Website address for Agent or Owner
- Link to Property Information on Agent or Owner's Website
- Google Earth Link to aerial and ground photo
- Total Size of Center if existing
- Available Space in Center
- Parcel Size if vacant land
- Existing Tenants if existing shopping center
- Traffic Count at property
- Summary of Recruitment opportunities specific to property
- Specific Prospects for property
- Overall strategy for property
- General comments



Development of the Strategic Retail Recruitment Plan

Explanation of Opportunities. Action Plan Moving Forward.

Recruitment Strategy

After analyzing the data, boots on the ground analysis, and input from the client, Retail Strategies team will devise a Recruitment Strategy for the community. The Recruitment Strategy will identify both short-term and long-term recruitment objectives and goals.

Retail Prospects

The Retail Prospect List, which will include targeted retail prospects for recruitment to Groveland, is a list of opportunities based on the initial research and analysis (both quantitative and in-market). The Retail Prospect List is a dynamic document which is continuously updated based on real time conversations with both retailers and developers. As we represent Groveland nationally, present opportunities within Groveland to retailers and developers, and learn of newly announced retail expansion plans and concepts, the prospect list will be updated accordingly.

Recommendations for Site Locations for Retail/Restaurant Companies

Retail Strategies will work with the city to prioritize commercial properties that may be suitable sites to present to prospective new retailers. This will include maps, marked aerials, and all pertinent contact and site specific information relative to each site.

Monthly Update

Through Basecamp, emails, and phone calls our team will keep the identified contacts updated relative to recruitment efforts and specific interaction with prospective retailers and developers interested in Groveland retail trade area.



Marketing Materials

Give Them What They Want

Marketing materials are an essential tool to recruiting retailers. Our team will build custom materials to attract retail to your community. We carefully crafted the information within each Marketing piece to best represent the opportunities in the community, and show the decision makers the information the desire when looking at an expansion opportunity.



Market Highlights

Quick Facts

- Economy of Bixby, Oklahoma has one the Social Index Society Segmentation (SIS) Plus. Bixby ranks 8 on efficient, low-income market with a diverse floor. Residents are 20% to 30% less likely than the rest of the city but close enough to commute to professional job centers. Life in this suburban wilderness offers the best of both worlds: access to green spaces, parks, and family-oriented services, and family-oriented services.
- The median household income for Bixby, Oklahoma is \$77,455. The five-year projection for total household income in Bixby is \$88,144. This represents an increase of 13.1%.
- Tulsa County (OKLADOT)

Year 41	14,000 MPO
Year 50	15,000 MPO

Major Area Employers

Company Name	Total Employees
Major Plaza	405
Bixby Public Schools	400
Country Club	180
Target	140
Lenox	130
Genex	121
Wal-Mart	100
City of Bixby	100
Cherry Security Serv	100
Reser's	100

Major Area Schools

Bixby Public Schools	Total Enrollment
Wichita Hills	6,798

FOCUS PROPERTIES

SITE	ADDRESS	SITE	ADDRESS
• Squares Family Center	15040 S Memorial	• Vacant Land	12101 S Memorial
• Vacant Land - 20 AC	14047 S Memorial	• Vacant Land - 1.8 AC	12100 S Memorial
• Vacant Land - 1.92 AC	13404 S Memorial	• Vacant Texas Roadhouse	11982 S Memorial
• Vacant Land	12801 S Memorial	• Vacant Bank	Sauk Memorial Drive
• Baby Crossing	13803 S Memorial	• Vacant Lot	11712 S Memorial
• Vacant Land	12801 S Memorial	• The Shopper at Major Plaza	15458 E 80th S Ave
• Vacant Land - 1.24 AC	13200 S Memorial	• Pad Site	8250 E 101st Street

GAP ANALYSIS

10 Minute Drive Time

General Merchandise Stores	\$27,582,464	Electronics Stores	\$4,589,612
Full-Service Restaurants	\$8,838,927	Learning Goods Stores	\$3,609,440
Building Materials Dealers	\$8,936,444	Office Supplies & Stationery Stores	\$2,190,487
Family Clothing Stores	\$6,082,396	Women's Clothing Stores	\$2,875,580
Limited-Service Restaurants	\$6,039,704	Health & Personal Care Stores	\$1,927,675
Jewelry Stores	\$5,021,705	Cosmetics & Beauty Supply Stores	\$1,482,927

BIXBY, OK

Marketing Guide



Bixby, Oklahoma - Tulsa & Wagoner County




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DEMOGRAPHIC PROFILE	5 Mile Radius	10 Mile Radius	5 Minute Drive Time	10 Minute Drive Time
2014 Estimated Population	37,371	208,548	5,535	41,381
Total Number of Employees	10,901	117,699	3,081	13,216
Median HH Income	\$77,985	\$56,080	\$47,277	\$73,210

National Representation

How Do We Represent?

In 2015 Retail Strategies will attend more than thirty (30) Retail Real Estate Conferences to represent our clients to developers and expanding retailers. After thorough preparation for each convention, our team sits down with decision makers with data, sites, and other creative tools to position your community to attract the right retailer.

What is ICSC?

The International Council of Shopping Centers (ICSC) is the global trade association for the retail industry. ICSC helps both the public and private sector understand the market through educational programs, monthly publications, certification programs, and (most popular) Deal Making Conventions. The most well known and most attended is ICSC RECON which takes place annually in May in Las Vegas, NV. This year there are over 35,000 attendees and is the largest year on record. RECON is one of the largest opportunities for Retail Strategies to represent your community each year to expanding retail concepts. In addition, Regional Deal Making Shows are another great opportunity to meet with retail decision makers.

Deal Making Space

Retail Strategies invests heavily each year to provide a leading platform for our Clients at retail conferences nationally. By having this platform, retailers, brokers, developers, and investors take notice and will connect with our team to discuss your community. In 2015 Retail Strategies will have over 5,000 sf of deal making space for our team to represent and our clients to utilize across the Country at more than a dozen retail conferences.



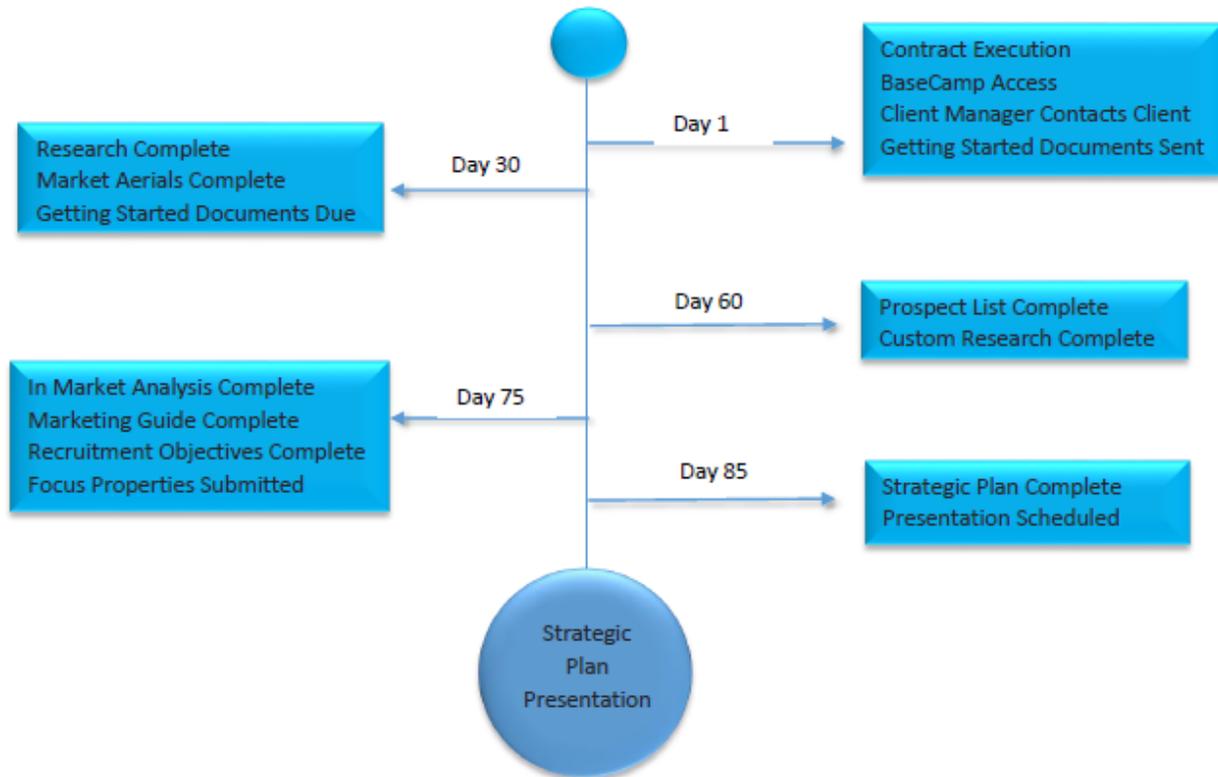
LAS VEGAS	2015
NEW YORK CITY	2015
DALLAS	2015
ATLANTA	2015
CHICAGO	2015
ORLANDO	2015
OKLAHOMA CITY	2015
NEW ORLEANS	2016
CHARLOTTE	2016



Timeline

On Boarding Process

Following the execution of our agreement Retail Strategies begins immediately working to better understand and identify opportunities within the market. The following diagram gives you a brief perspective on the completion dates for the materials that go in to the Strategic Retail Recruitment Plan.



Investment

Year 1

\$50,000

- Research Quantitative and In-Market Assessment of Real Estate Assets
- Access to BaseCamp
- Development of the Strategic Retail Recruitment Plan
 - Recruitment Strategy for New Retail and Restaurant Companies
 - Provide Identification and Recommendation of Retail Prospects
 - Recommendation of Site Locations for Retail/Restaurant Concepts
 - Development of Marketing Materials
 - Call List and Recruitment Updates
- Execution of Strategic Recruitment Plan
 - Working with local property owners, developers and real estate professionals in order to facilitate retail growth, including On Demand Research/Analysis
 - Outreach to retail prospects with continuous updating of Retail Prospect List
 - Representation at national and regional retail real estate conferences

Year 2 & 3

\$30,000

Retail Strategies, for year two and three of the engagement, will provide updated research and continue on-demand research reports/analysis.

- Updated quantitative research and on-demand research reports/analysis
- Updating of Strategic Retail Recruitment Plan
- Updating of Retail Prospect List
- Representation at national and regional retail real estate conferences
- Representation at national and regional retail real estate conferences

DATA ANALYSIS METHODOLOGY AND APPROACH

Our research solutions are not a "one size fits all" or pre-formatted by an industry standard radius or drive-time area. Each city, neighborhood or retail trade area requires unique analysis based on numerous factors including natural boundary areas, current retail tenant mix, travel times, radius areas and existing sites/buildings. Our research focuses on identifying the data points that are most likely to influence the site location decisions of retailers. Once these data points are determined – we provide thematic maps, aerial photos, asset maps, and customized research reports by retail concept.

PRIMARY DATA RESOURCES

Census, AGS, and ESRI Demographics: By incorporating demographic data from multiple sources, DDR is able to better understand the population, income and retail spending shifts taking place in the current economic environment.

Business Location Data: This location data is ideal for competitive analysis, understanding market opportunities and evaluating market dynamics. Sourced to D&B®, the world's most trusted source of sales and marketing solutions, all D&B information is powered by DUNSRight™, D&B's Quality Process which gives you the insight you need to identify and target prospects.

Consumer Expenditures: This data includes 18 reports and close to 1,000 variables that collectively cover almost 95% of household spending. Based on extensive modeling of the BLS Consumer Expenditure Survey, CEX provides reliable estimates of market demand and average household expenditures.

Retail Potential: This new tabulation utilizes the Census of Retail Trade tables which cross-tabulates store type by merchandise line. The Consumer Expenditure data was aggregated to the merchandise line classification and then distributed to each of the major store types.

Tapestry Psychographic Segmentation: Tapestry, an ESRI product, classifies US neighborhoods into 65 market segments based on socioeconomic and demographic factors, then consolidates them into LifeMode and Urbanization Groups.

Additional Information and Sources for our Research:

- Census data from 1980 through 2010 (Census years), current year and 5 year projections. Data and reports are updated annually and across all identified retail trade areas for all client engagements.
- Most of our data providers use similar methodologies for creating estimates and projections – which is then impacted by methodologies for aggregating that data across block groups up to trade area boundaries.
- AGS demographics for current year and 5 year projections.

- ESRI demographics for current year and 5 year projections.
- Claritas demographics for current year and 5 year projections.
- We use the following additional datasets for segmentation analysis:
 - MOSAIC
 - Tapestry
- MRI's Consumer Behavior and Attitude data.
- Additional data from the Bureau of Economic Analysis, Census of Retail/Consumer Spending, and the Department of Labor.
- Multiple sources for our GAP Analysis supplemented by business databases and our boots on the ground market research.
- Crime stats directly from the FBI.
- IPEDS for analysis of 2 year and 4 year education institutions when needed to better understand the demographics of college students in a given market/trade area.
- We create geographies and maps down to areas as small as .5 mile radius or 1 minute travel times.
- We create custom retail trade areas by aggregating geography boundaries or hand drawing polygons.
- Our software solutions allow us to filter a retailer's locations to then match targeted sites within each engaged clients retail trade area(s).
- We use Regus software to create aerials by city, retail trade area or development/redevelopment zones including locations of all existing retail. Regus also allows us to map identified development, redevelopment and higher and best use locations within targeted retail corridors.

Conduct Market Research

- Identify Groveland Retail Trade Areas

Retail Strategies will identify the appropriate radius, drive time and custom trade areas based on feedback from key community contacts, analysis of peer communities and through our onsite market visits

- Perform Market & Retail GAP Analysis

Once the Retail Trade Areas are identified, we begin the process of performing detailed demographic research, GAP/leakage analysis across all retail categories and household level consumer expenditure reviews to use as part of our pro-active outreach to retailers. Our Custom Demographic Research includes Historical, Current, and Projected Demographics from multiple sources

- Conduct Retail Peer Identification and Analysis

Retailers have a tendency to locate in similar communities and/or trade areas. By identifying communities similar to Groveland markets from a demographic and business scope, we can analyze those retailers who have shown a propensity to locate in these peer areas.

- Provide Consumer Attitude and Behavior Analysis

Our detailed consumer attitude and behavior data allows us to drill down to the consumer level and understand their preferences and likelihood to purchase products and services. Local retail businesses can use this data to better understand the product and service mix needed to grow their company and capture spending that may be leaving the immediate trade area

- Identify/Evaluate/Catalog Available Commercial Properties and Development Opportunities

Understanding the real estate options within the market for development, redevelopment and higher and best use allows the Retail Strategies team to position specific properties to retail prospects. Our licensed real estate professionals drive the market and retail corridors within Groveland to build a database of the available commercial properties

- Tapestry Lifestyles - Psychographic Profile of Trade Area / Market Segmentation Analysis

Retailers today know the psychographic profiles of their target consumer. Through Tapestry Lifestyles we are able to review 65 segmentation groups and match the consumer profile of Groveland shoppers to prospective retailers. This data can also be critical to retailers regarding the types of product and service offered once the location decision has been reached

- Thematic Mapping and Aerial Imagery by trade area

Data visualization allows retailers to identify and target areas for expansion/relocation and the consumers that match their customer profile