



The**Retail**Coach®

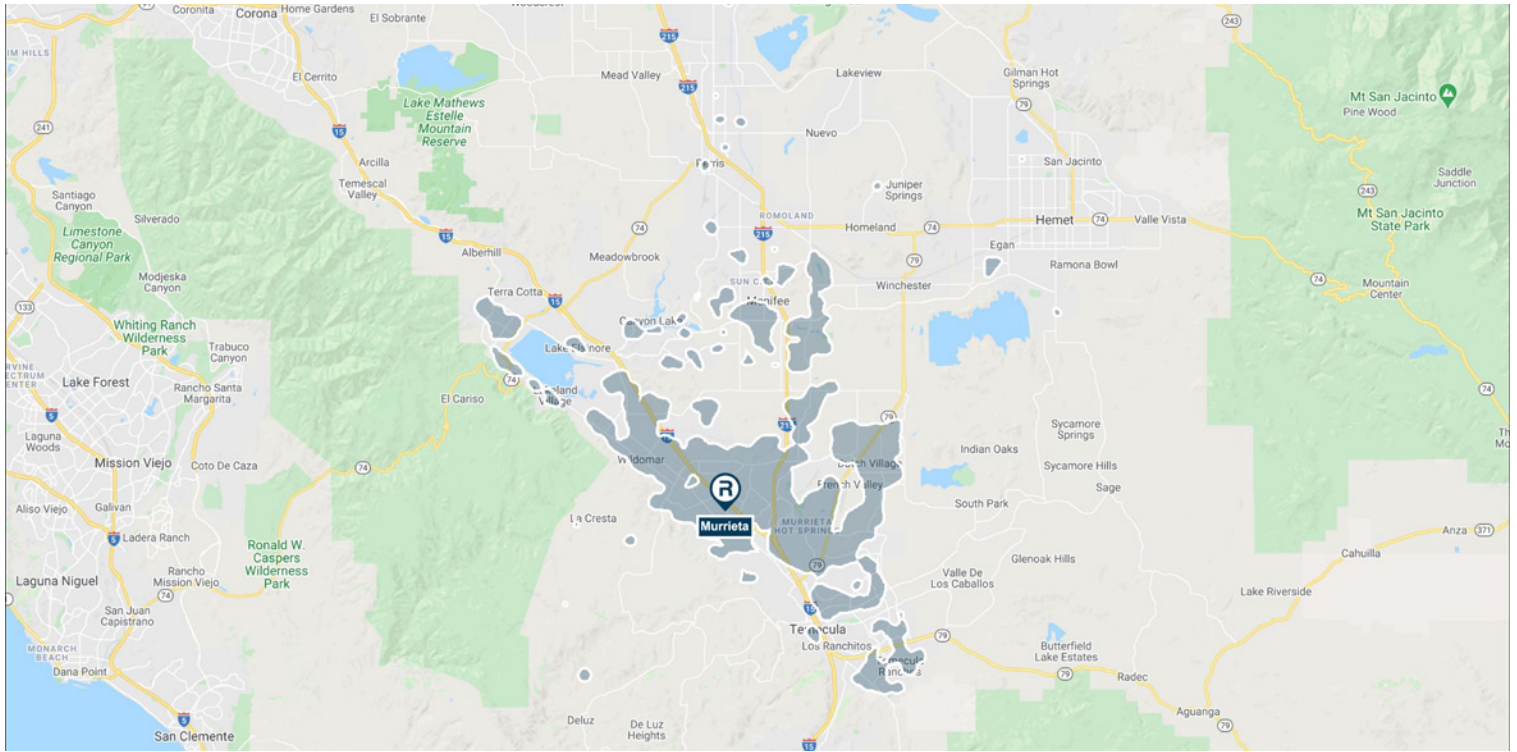
# Primary Retail Trade Area Psychographic Profile

MURRIETA, CALIFORNIA

Prepared for The City of Murrieta, CA  
February 2023

# Primary Retail Trade Area • Demographic Snapshot

## Murrieta, California



### Population

2010	320,538	0 - 9 Years	13.26%
2022	388,555	10 - 17 Years	12.27%
2027	406,276	18 - 24 Years	10.08%

### Educational Attainment (%)

Graduate or Professional Degree	9.07%	25 - 34 Years	13.99%
Bachelors Degree	18.14%	35 - 44 Years	13.08%
Associate Degree	9.60%	45 - 54 Years	13.34%
Some College	28.36%	55 - 64 Years	11.84%
High School Graduate (GED)	24.53%	65 and Older	12.15%
Some High School, No Degree	5.36%	Median Age	35.30
Less than 9th Grade	4.95%	Average Age	36.79

### Income

Average HH	\$128,154	Median Age	35.30
Median HH	\$102,657	Average Age	36.79
Per Capita	\$38,582		

### Race Distribution (%)

White	59.08%
Black/African American	6.80%
American Indian/Alaskan	0.92%
Asian	10.22%
Native Hawaiian/Islander	0.46%
Other Race	14.62%
Two or More Races	7.90%
Hispanic	38.02%



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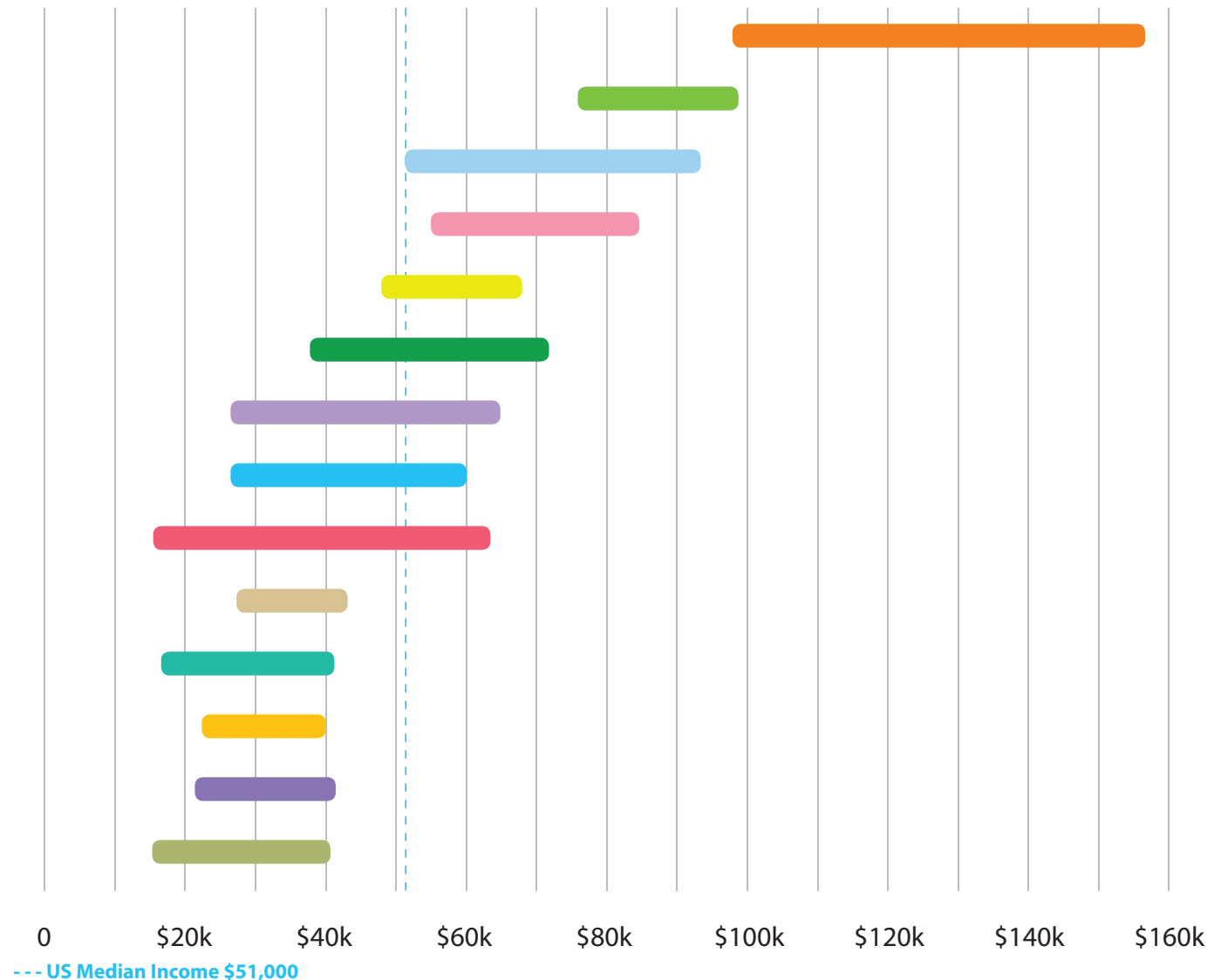
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# Income Range of Lifemode Summary Groups

Murrieta, California



## + L1 AFFLUENT ESTATES

Established wealth — educated, well-traveled married couples

## + L2 UPSCALE AVENUES

Prosperous, married couples in higher density neighborhoods

## + L3 UPTOWN INDIVIDUALS

Younger, urban singles on the move

## + L4 FAMILY LANDSCAPES

Successful younger families in newer housing

## + L5 GENXURBAN

Gen X in middle age; families with fewer kids and a mortgage

## + L6 COZY COUNTRY

Empty nesters in bucolic settings

## + L7 ETHNIC ENCLAVES

Established diversity — young, Hispanic homeowners with families

## + L8 MIDDLE GROUND

Lifestyles of thirtysomethings

## + L9 SENIOR STYLES

Senior lifestyles reveal the effects of saving for retirement

## + L10 RUSTIC OUTPOSTS

Country life with older families, older homes

## + L11 MIDTOWN SINGLES

Millennials on the move; single, diverse, and urban

## + L12 HOMETOWN

Growing up and staying close to home; single householders

## + L13 NEXT WAVE

Urban denizens; young, diverse, hardworking families

## + L14 SCHOLARS AND PATRIOTS

College campuses and military neighborhoods



# Primary Retail Trade Area • Top Tapestry Segments

## Murrieta, California

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College campuses and military neighborhoods

	TAPESTRY SEGMENTATION	HOUSEHOLDS PERCENT	CUMULATIVE PERCENT	US HOUSEHOLDS PERCENT	CUMULATIVE PERCENT	INDEX
1	Boomburbs (1C)	23.0%	23.0%	1.9%	1.9%	1203
2	Up and Coming Families (7A)	21.6%	44.7%	2.8%	4.7%	777
3	Workday Drive (4A)	11.5%	56.2%	3.1%	7.8%	376
4	Home Improvement (4B)	6.4%	62.5%	1.7%	9.4%	377
5	Bright Young Professionals (8C)	4.0%	66.5%	2.3%	11.8%	171
	Subtotal	66.5%		11.8%		
6	The Elders (9C)	3.8%	70.3%	0.7%	12.5%	524
7	Pleasantville (2B)	3.8%	74.1%	2.1%	14.6%	179
8	Urban Edge Families (7C)	3.5%	77.6%	1.5%	16.1%	233
9	Metro Fusion (11C)	3.1%	80.7%	1.5%	17.6%	215
10	Exurbanites (1E)	1.8%	82.5%	1.9%	19.5%	93
	Subtotal	16.0%		7.7%		
11	Savvy Suburbanites (1D)	1.7%	84.2%	3.0%	22.5%	57
12	Front Porches (8E)	1.5%	85.7%	1.6%	24.1%	94
13	Down the Road (10D)	1.3%	87.0%	1.2%	25.2%	110
14	Professional Pride (1B)	1.3%	88.2%	1.6%	26.8%	76
15	Retirement Communities (9E)	1.2%	89.4%	1.2%	28.0%	100
	Subtotal	7.0%		8.6%		
16	Urban Villages (7B)	1.0%	90.4%	1.0%	29.1%	99
17	Enterprising Professionals (2D)	0.9%	91.4%	1.5%	30.5%	63
18	NeWest Residents (13C)	0.9%	92.3%	0.8%	31.3%	115
19	Middleburg (4C)	0.9%	93.2%	3.1%	34.4%	29
20	Family Extensions (13B)	0.8%	94.0%	0.7%	35.1%	110
	Subtotal	4.5%		7.1%		
	Total	94.0%		35.1%		268



# 1C LifeMode Group: Affluent Estates Boomburbs

**US Households:** 2,004,400  
**Average Household Size:** 3.25

**Median Age:** 34.0  
**Median Household Income:** \$113,400

## WHO ARE WE?

This is the new growth market, with a profile similar to the original: young professionals with families that have opted to trade up to the newest housing in the suburbs. The original Boomburbs neighborhoods began growing in the 1990s and continued through the peak of the housing boom. Most of those neighborhoods are fully developed now. This is an affluent market but with a higher proportion of mortgages. Rapid growth still distinguishes the Boomburbs neighborhoods, although the boom is more subdued now than it was 10 years ago. So is the housing market. Residents are well-educated professionals with a running start on prosperity.

## OUR NEIGHBORHOOD

- Growth markets are in the suburban periphery of large metropolitan areas.
- Young families are married with children (Index 220); average household size is 3.25.
- Home ownership is 84% (Index 134), with the highest rate of mortgages, 71.5% (Index 173).
- Primarily single-family homes, in new neighborhoods, 66% built since 2000 (Index 441).
- Median home value is \$350,000 (Index 169).
- Lower housing vacancy rate at 3.7%.
- The cost of affordable new housing comes at the expense of one of the longest commutes to work, over 30 minutes average, including a disproportionate number (33.6%) commuting across county lines (Index 141).

## SOCIOECONOMIC TRAITS

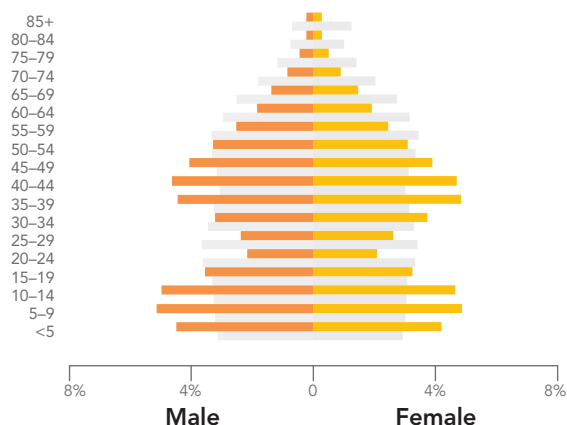
- Well educated young professionals, 55% are college graduates (Index 178).
- Unemployment is low at 3.3% (Index 61); high labor force participation at 71.3% (Index 114); most households have more than two workers (Index 124).
- Longer commute times from the suburban growth corridors have created more home workers (Index 156).
- They are well connected: own the latest devices and understand how to use them efficiently; biggest complaints—too many devices and too many intrusions on personal time.
- Financial planning is well under way for these professionals.

# 1C LifeMode Group: Affluent Estates Boomburbs

## AGE BY SEX (Esri data)

Median Age: **34.0** US: 38.2

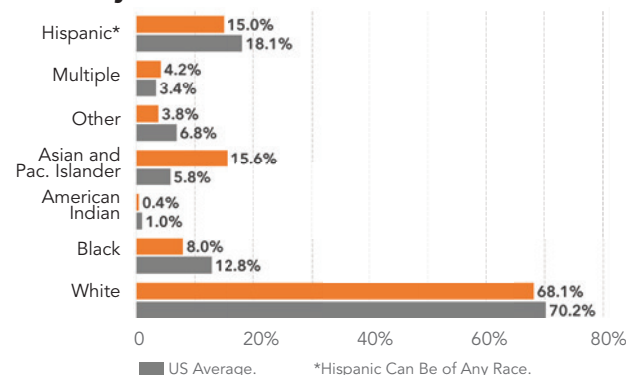
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## RACE AND ETHNICITY (Esri data)

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

Diversity Index: **63.2** US: 64.0



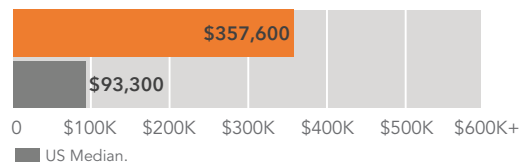
## INCOME AND NET WORTH

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

### Median Household Income



### Median Net Worth



## HOUSING

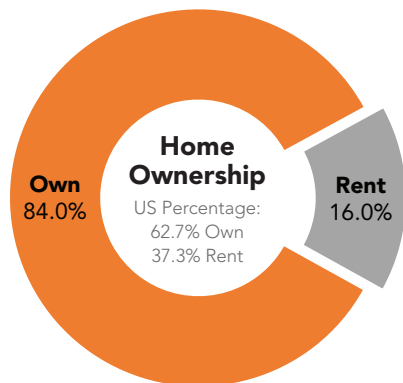
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Typical Housing:  
Single Family

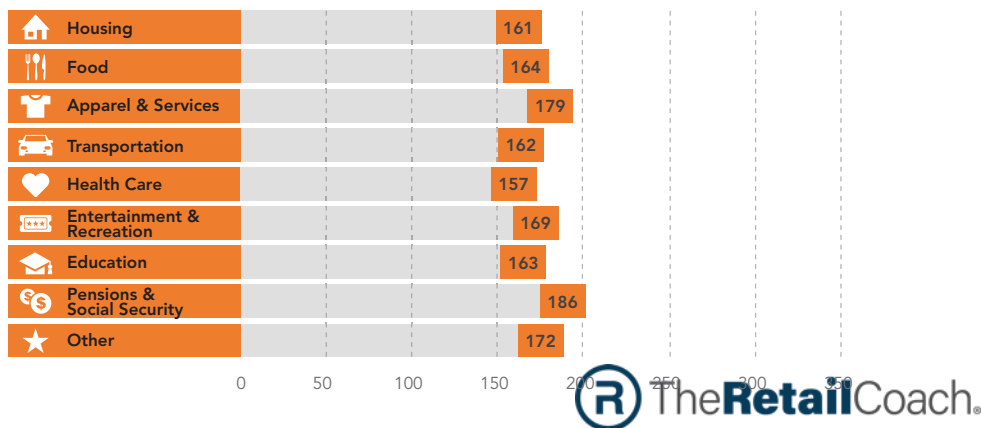
Median Value:  
\$350,000

US Median: \$207,300



## AVERAGE HOUSEHOLD BUDGET INDEX

The index compares the average amount spent in this market's household budgets for housing, food, apparel, etc., to the average amount spent by all US households. An index of 100 is average. An index of 120 shows that average spending by consumers in this market is 20 percent above the national average. Consumer expenditures are estimated by Esri.



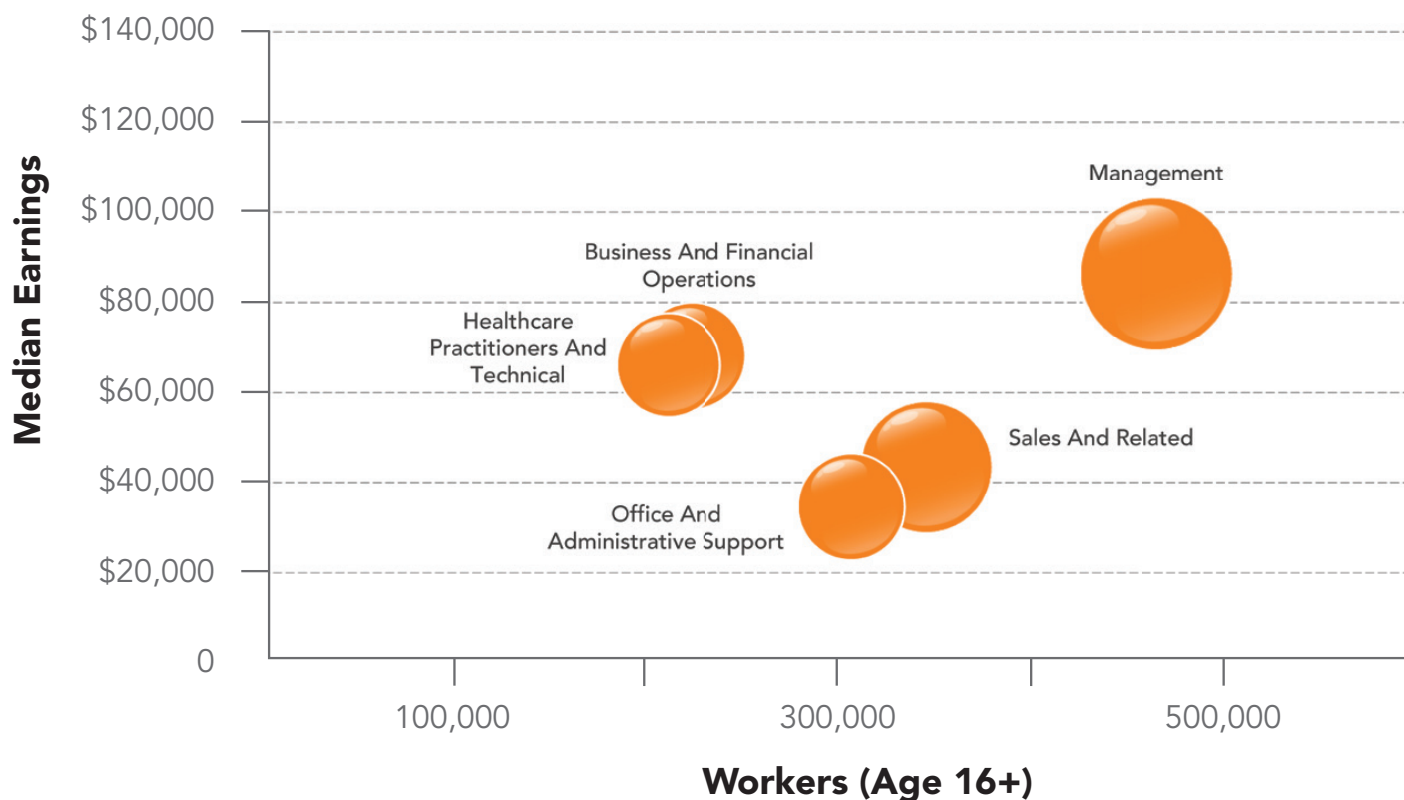
# 1C LifeMode Group: Affluent Estates Boomburbs

## Market Profile

- Boomburbs residents prefer late model imports, primarily SUVs, and also luxury cars and minivans.
- This is one of the top markets for the latest in technology, from smartphones to tablets to Internet connectable televisions.
- Style matters in the Boomburbs, from personal appearance to their homes. These consumers are still furnishing their new homes and already remodeling.
- They like to garden but more often contract for home services.
- Physical fitness is a priority, including club memberships and home equipment.
- Leisure includes a range of activities from sports (hiking, bicycling, swimming, golf) to visits to theme parks or water parks.
- Residents are generous supporters of charitable organizations.

## OCCUPATION BY EARNINGS

The five occupations with the highest number of workers in the market are displayed by median earnings. Data from the Census Bureau's American Community Survey.





# 7A LifeMode Group: Ethnic Enclaves

## Up and Coming Families

**US Households:** 2,901,200  
**Average Household Size:** 3.12

**Median Age:** 31.4  
**Median Household Income:** \$72,000

### WHO ARE WE?

Up and Coming Families is a market in transition—residents are younger and more mobile and ethnically diverse than the previous generation. They are ambitious, working hard to get ahead, and willing to take some risks to achieve their goals. The recession has impacted their financial well-being, but they are optimistic. Their homes are new; their families are young. And this is one of the fastest-growing markets in the country.

### OUR NEIGHBORHOOD

- New suburban periphery: new families in new housing subdivisions.
- Building began in the housing boom of the 2000s and continues in this fast-growing market.
- Single-family homes with a median value of \$194,400 and a lower vacancy rate.
- The price of affordable housing: longer commute times (Index 217).

### SOCIOECONOMIC TRAITS

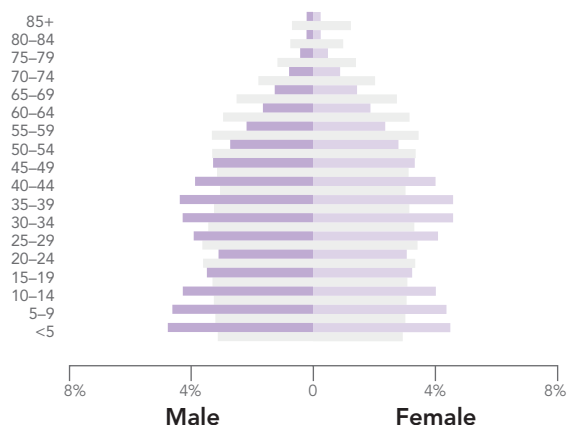
- Education: 67% have some college education or degree(s).
- Hard-working labor force with a participation rate of 71% (Index 114) and low unemployment at 4.6% (Index 84).
- Most households (61%) have 2 or more workers.
- Careful shoppers, aware of prices, willing to shop around for the best deals and open to influence by others' opinions.
- Seek the latest and best in technology.
- Young families still feathering the nest and establishing their style.

# 7A LifeMode Group: Ethnic Enclaves Up and Coming Families

## AGE BY SEX (Esri data)

Median Age: **31.4** US: 38.2

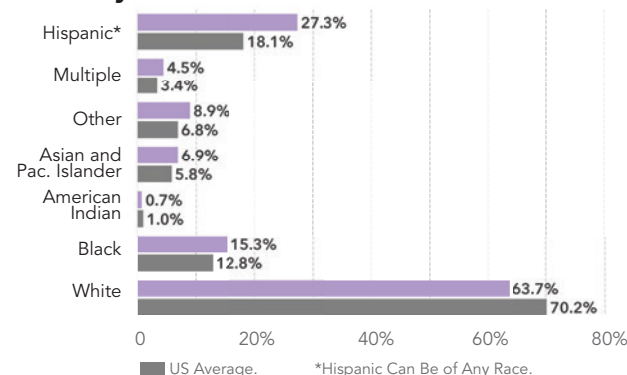
■ Indicates US



## RACE AND ETHNICITY (Esri data)

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

Diversity Index: **73.9** US: 64.0



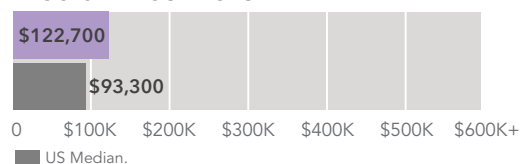
## INCOME AND NET WORTH

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### Median Household Income



### Median Net Worth



## HOUSING

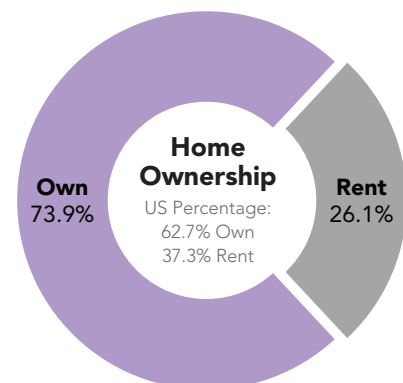
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Typical Housing:  
Single Family

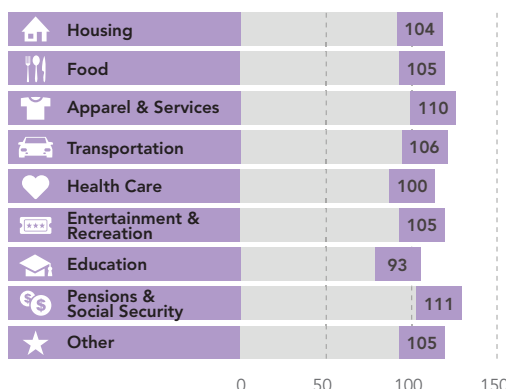
Median Value:  
\$194,400

US Median: \$207,300



## AVERAGE HOUSEHOLD BUDGET INDEX

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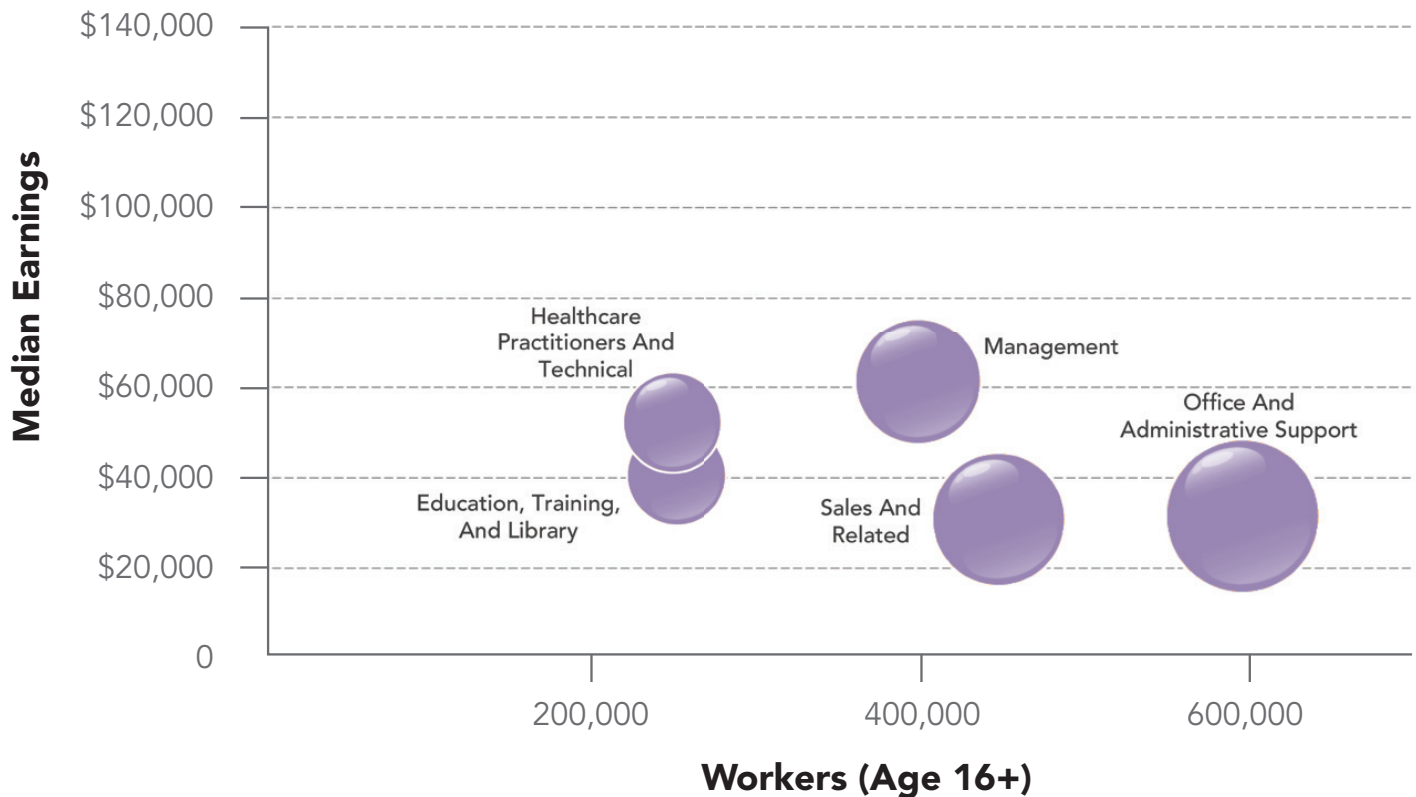
# 7A LifeMode Group: Ethnic Enclaves Up and Coming Families

## Market Profile

- Rely on the Internet for entertainment, information, shopping, and banking.
- Prefer imported SUVs or compact cars, late models.
- Carry debt from credit card balances to student loans and mortgages, but also maintain retirement plans and make charitable contributions.
- Busy with work and family; use home and landscaping services to save time.
- Find leisure in family activities, movies at home, trips to theme parks or the zoo, and sports; from golfing, weight lifting, to taking a jog or run.

## OCCUPATION BY EARNINGS

The five occupations with the highest number of workers in the market are displayed by median earnings. Data from the Census Bureau's American Community Survey.



# 4A LifeMode Group: Family Landscapes

## Soccer Moms

**US Households:** 3,541,300  
**Average Household Size:** 2.97

**Median Age:** 37.0  
**Median Household Income:** \$90,500

### WHO ARE WE?

Soccer Moms is an affluent, family-oriented market with a country flavor. Residents are partial to new housing away from the bustle of the city but close enough to commute to professional job centers. Life in this suburban wilderness offsets the hectic pace of two working parents with growing children. They favor time-saving devices, like banking online or housekeeping services, and family-oriented pursuits.

### OUR NEIGHBORHOOD

- Soccer Moms residents prefer the suburban periphery of metropolitan areas.
- Predominantly single family, homes are in newer neighborhoods, 34% built in the 1990s (Index 236), 31% built since 2000.
- Owner-occupied homes have high rate of mortgages at 68% (Index 164), and low rate vacancy at 4%.
- Median home value is \$257,400.
- Most households are married couples with children; average household size is 2.97.
- Most households have 2 or 3 vehicles; long travel time to work including a disproportionate number commuting from a different county (Index 132).

### SOCIOECONOMIC TRAITS

- Education: 40.5% college graduates; more than 72% with some college education.
- Low unemployment at 3.8%; high labor force participation rate at 71%; 2 out of 3 households include 2+ workers (Index 124).
- Connected, with a host of wireless devices from iPods to tablets—anything that enables convenience, like banking, paying bills, or even shopping online.
- Well insured and invested in a range of funds, from savings accounts or bonds to stocks.
- Carry a higher level of debt, including first (Index 149) and second mortgages (Index 154) and auto loans (Index 149).

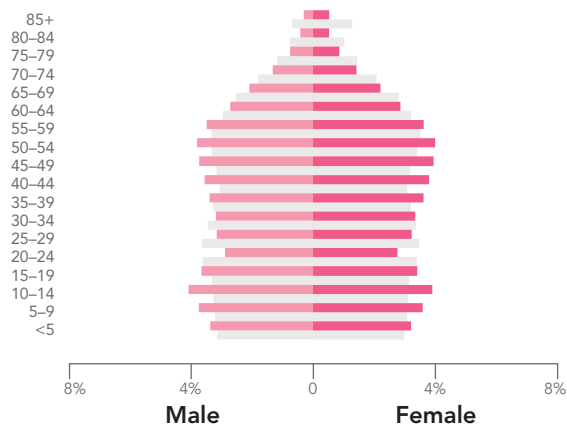
# 4A LifeMode Group: Family Landscapes

## Soccer Moms

### AGE BY SEX (Esri data)

Median Age: **37.0** US: 38.2

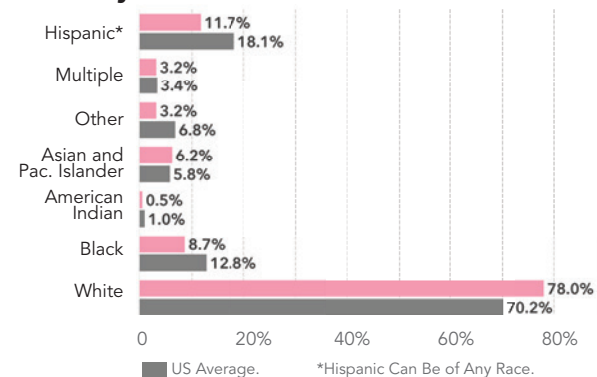
■ Indicates US



### RACE AND ETHNICITY (Esri data)

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

Diversity Index: **50.8** US: 64.0



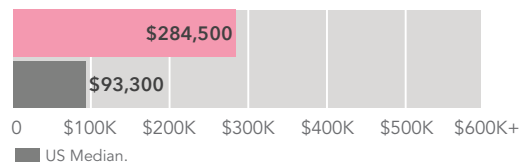
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#### Median Household Income



#### Median Net Worth



### HOUSING

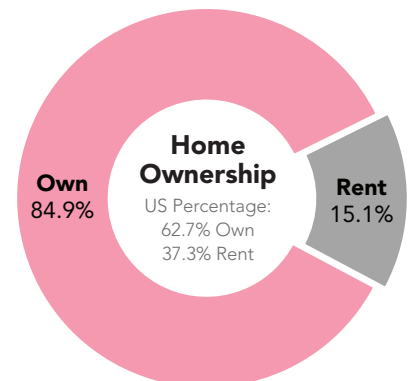
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Typical Housing:  
Single Family

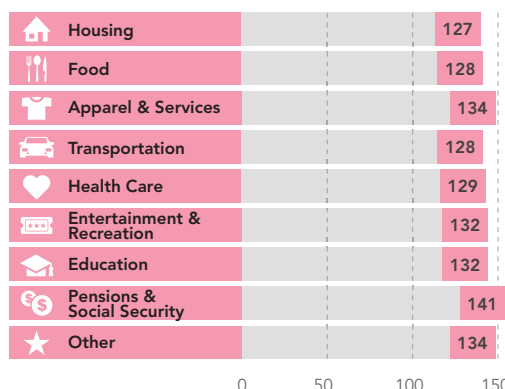
Median Value:  
\$257,400

US Median: \$207,300



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# 4A LifeMode Group: Family Landscapes

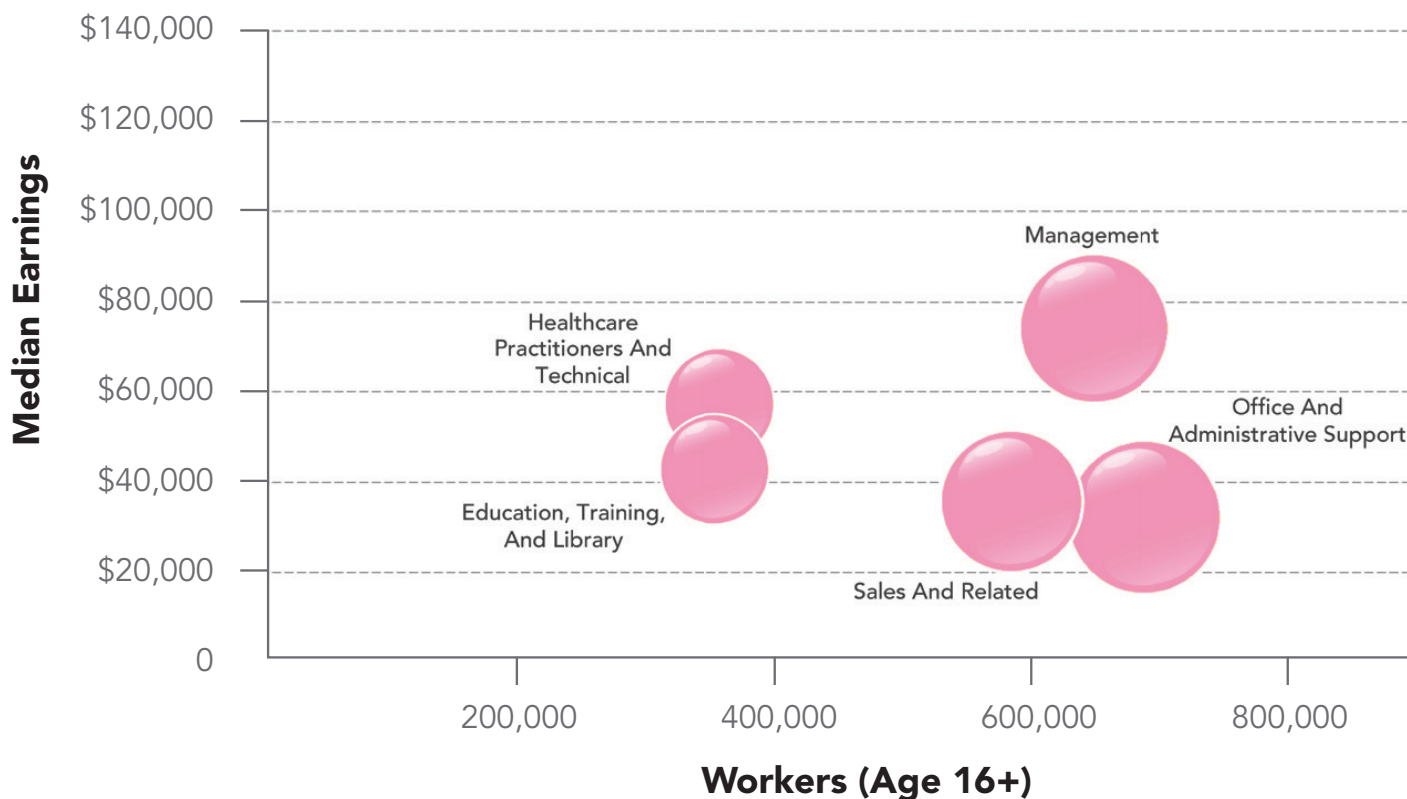
## Soccer Moms

### Market Profile

- Most households own at least 2 vehicles; the most popular types are minivans and SUVs.
- Family-oriented purchases and activities dominate, like 4+ televisions (Index 154), movie purchases or rentals, children's apparel and toys, and visits to theme parks or zoos.
- Outdoor activities and sports are characteristic of life in the suburban periphery. They attend sporting events, as well as participate in them like bicycling, jogging, golfing, and boating.
- Home maintenance services are frequently contracted, but these families also like their gardens and own the tools for minor upkeep, like lawn mowers, trimmers, and blowers.

### OCCUPATION BY EARNINGS

The five occupations with the highest number of workers in the market are displayed by median earnings. Data from the Census Bureau's American Community Survey.





# 4B LifeMode Group: Family Landscapes

## Home Improvement

**US Households:** 2,114,500  
**Average Household Size:** 2.88

**Median Age:** 37.7  
**Median Household Income:** \$72,100

### WHO ARE WE?

Married-couple families occupy well over half of these suburban households. Most Home Improvement residences are single-family homes that are owner occupied, with only one-fifth of the households occupied by renters. Education and diversity levels are similar to the US as a whole. These families spend a lot of time on the go and therefore tend to eat out regularly. When at home, weekends are consumed with home improvement and remodeling projects.

### OUR NEIGHBORHOOD

- These are low density suburban neighborhoods.
- Eight of every 10 homes are traditional single-family dwellings, owner occupied.
- Majority of the homes were built between 1970 and 2000.
- More than half of the households consist of married-couple families; another 12% include single-parent families.

### SOCIOECONOMIC TRAITS

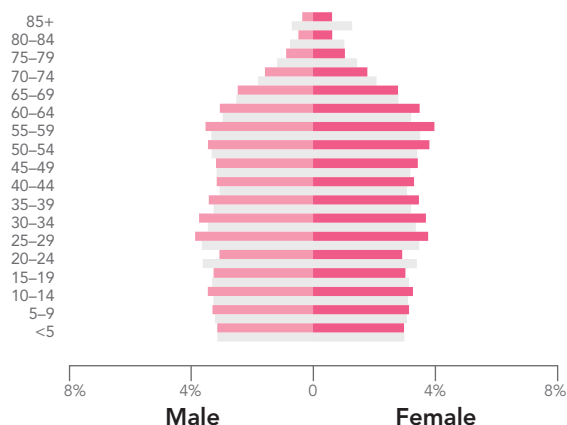
- Higher participation in the labor force and lower unemployment than US levels; most households have 2+ workers.
- Cautious consumers that do their research before buying, they protect their investments.
- Typically spend 4–7 hours per week commuting, and, therefore, spend significant amounts on car maintenance (performed at a department store or auto repair chain store).
- They are paying off student loans and home mortgages.
- They spend heavily on eating out, at both fast-food and family restaurants.
- They like to work from home, when possible.

# 4B LifeMode Group: Family Landscapes Home Improvement

## AGE BY SEX (Esri data)

Median Age: **37.7** US: 38.2

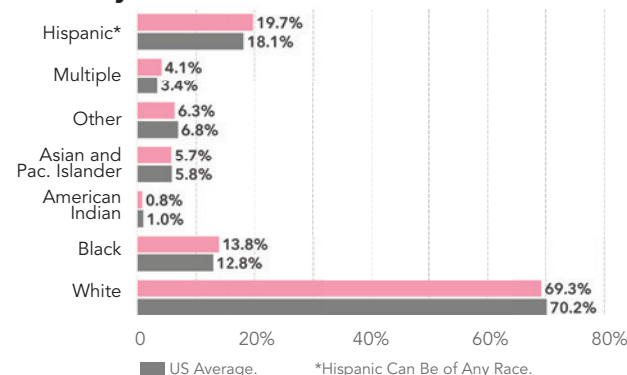
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## RACE AND ETHNICITY (Esri data)

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Diversity Index: **65.7** US: 64.0



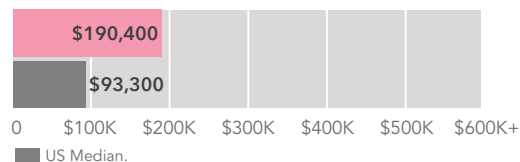
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### Median Household Income



### Median Net Worth



## HOUSING

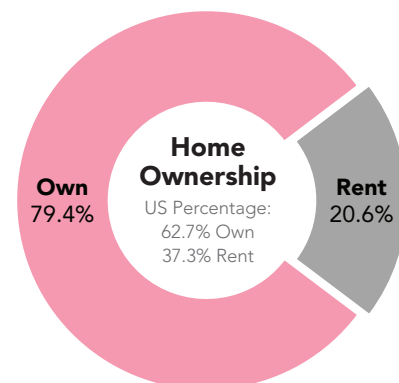
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Typical Housing:  
Single Family

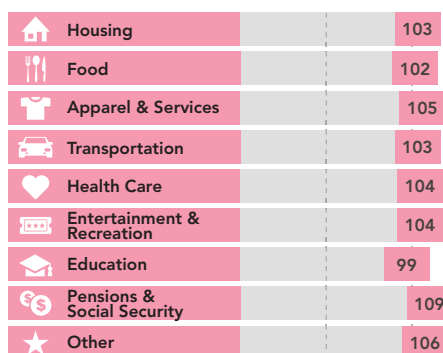
Median Value:  
\$192,600

US Median: \$207,300



## AVERAGE HOUSEHOLD BUDGET INDEX

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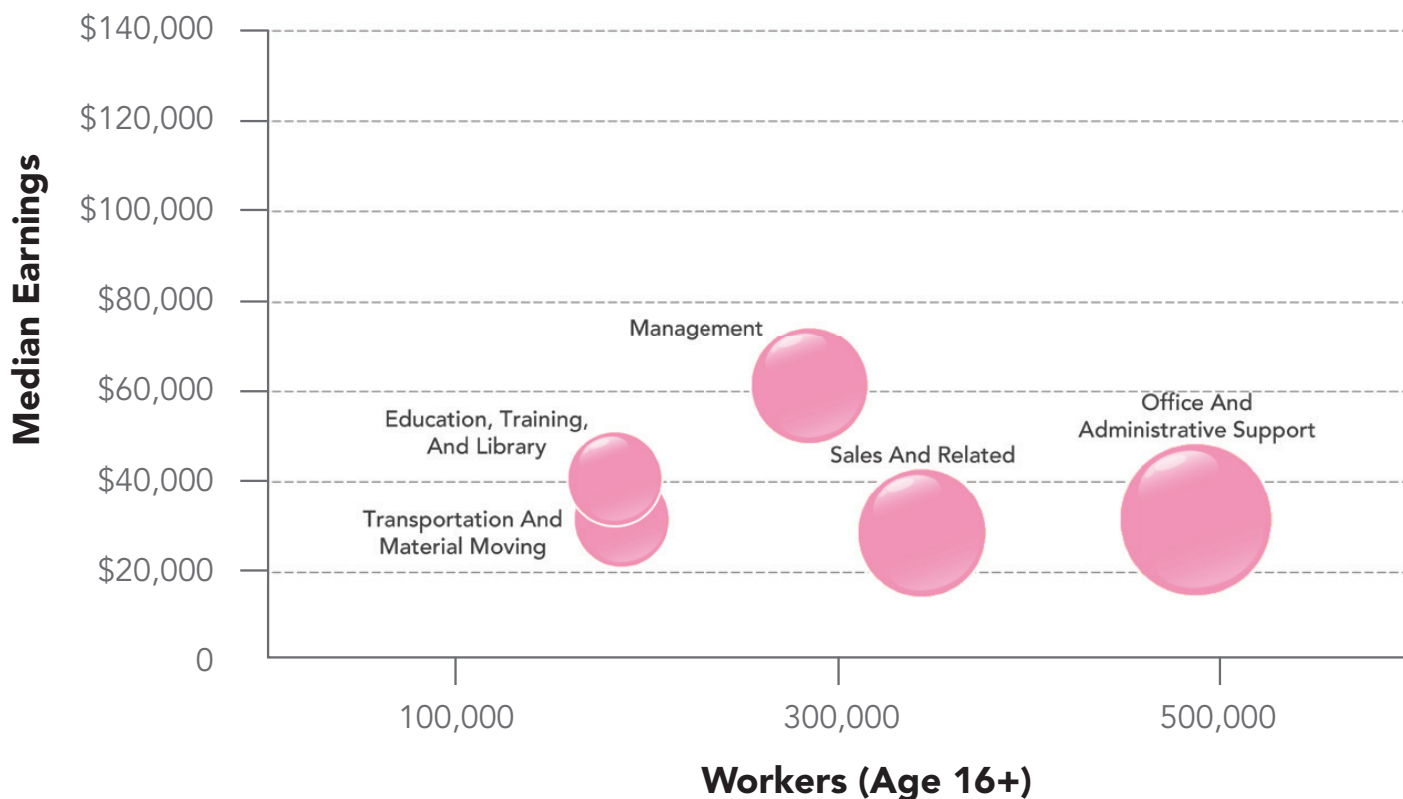
# 4B LifeMode Group: Family Landscapes Home Improvement

## Market Profile

- Enjoy working on home improvement projects and watching DIY networks.
- Make frequent trips to warehouse/club and home improvement stores in their minivan or SUV.
- Own a giant screen TV with fiber-optic connection and premium cable; rent DVDs from Redbox or Netflix.com.
- Very comfortable with new technology; embrace the convenience of completing tasks on a mobile device.
- Enjoy dining at Chili's, Chick-fil-A, and KFC.
- Frequently buy children's clothes and toys.

## OCCUPATION BY EARNINGS

The five occupations with the highest number of workers in the market are displayed by median earnings. Data from the Census Bureau's American Community Survey.



# 8C LifeMode Group: Middle Ground Bright Young Professionals

**US Households:** 2,750,200  
**Average Household Size:** 2.41

**Median Age:** 33.0  
**Median Household Income:** \$54,000

## WHO ARE WE?

Bright Young Professionals is a large market, primarily located in urban outskirts of large metropolitan areas. These communities are home to young, educated, working professionals. More than one out of three householders is under the age of 35. Slightly more diverse couples dominate this market, with more renters than homeowners. More than two-fifths of the households live in single-family homes; over a third live in 5+ unit buildings. Labor force participation is high, generally white-collar work, with a mix of food service and part-time jobs (among the college students). Median household income, median home value, and average rent are close to the US values. Residents of this segment are physically active and up on the latest technology.

## OUR NEIGHBORHOOD

- Approximately 57% of the households rent; 43% own their homes.
- Household type is primarily couples, married (or unmarried), with above average concentrations of both single-parent (Index 125) and single-person (Index 115) households.
- Multiunit buildings or row housing make up 56% of the housing stock (row housing (Index 178), buildings with 5–19 units (Index 275)); 43% built 1980–99.
- Average rent mirrors the US (Index 100).
- Lower vacancy rate is at 8.2%.

## SOCIOECONOMIC TRAITS

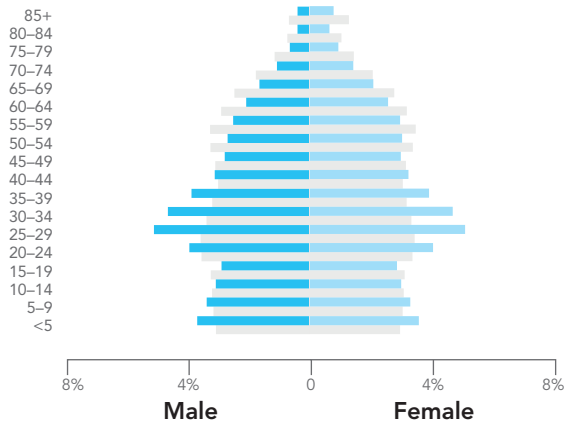
- Education completed: 35% with some college or an associate's degree, 33% with a bachelor's degree or higher.
- Unemployment rate is lower at 4.7%, and labor force participation rate of 72% is higher than the US rate.
- These consumers are up on the latest technology.
- They get most of their information from the Internet.
- Concern about the environment, impacts their purchasing decisions.

# 8C LifeMode Group: Middle Ground Bright Young Professionals

## AGE BY SEX (Esri data)

**Median Age: 33.0** US: 38.2

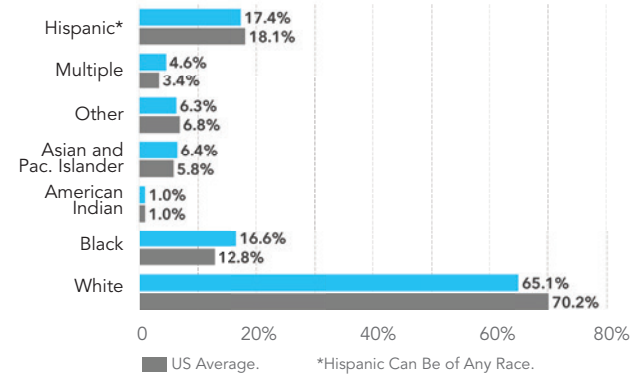
■ Indicates US



## RACE AND ETHNICITY (Esri data)

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

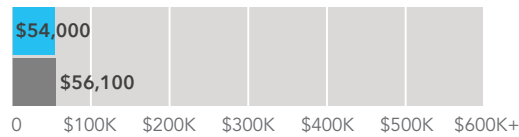
**Diversity Index: 67.5** US: 64.0



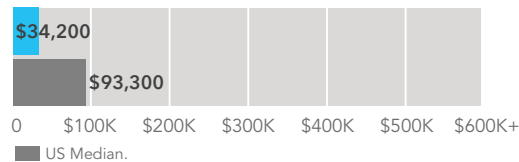
## INCOME AND NET WORTH

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

### Median Household Income



### Median Net Worth



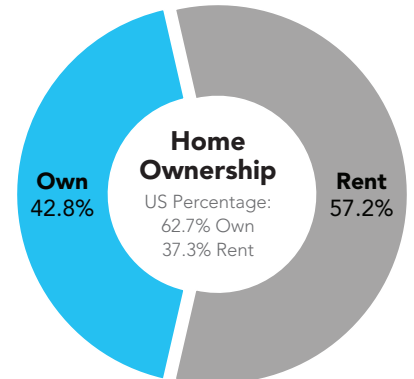
## HOUSING

Median home value is displayed for markets that are primarily owner occupied; average rent is shown for renter-occupied markets. Tenure and home value are estimated by Esri. Housing type and average rent are from the Census Bureau's American Community Survey.



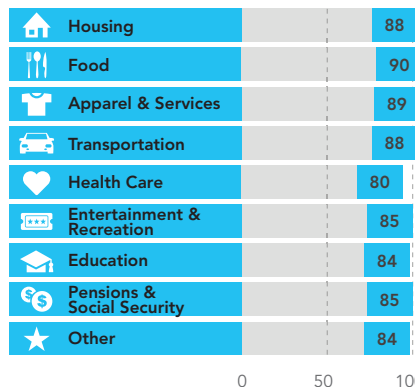
**Typical Housing:**  
Single Family;  
Multi-Units

**Average Rent:**  
\$1,042



## AVERAGE HOUSEHOLD BUDGET INDEX

The index compares the average amount spent in this market's household budgets for housing, food, apparel, etc., to the average amount spent by all US households. An index of 100 is average. An index of 120 shows that average spending by consumers in this market is 20 percent above the national average. Consumer expenditures are estimated by Esri.



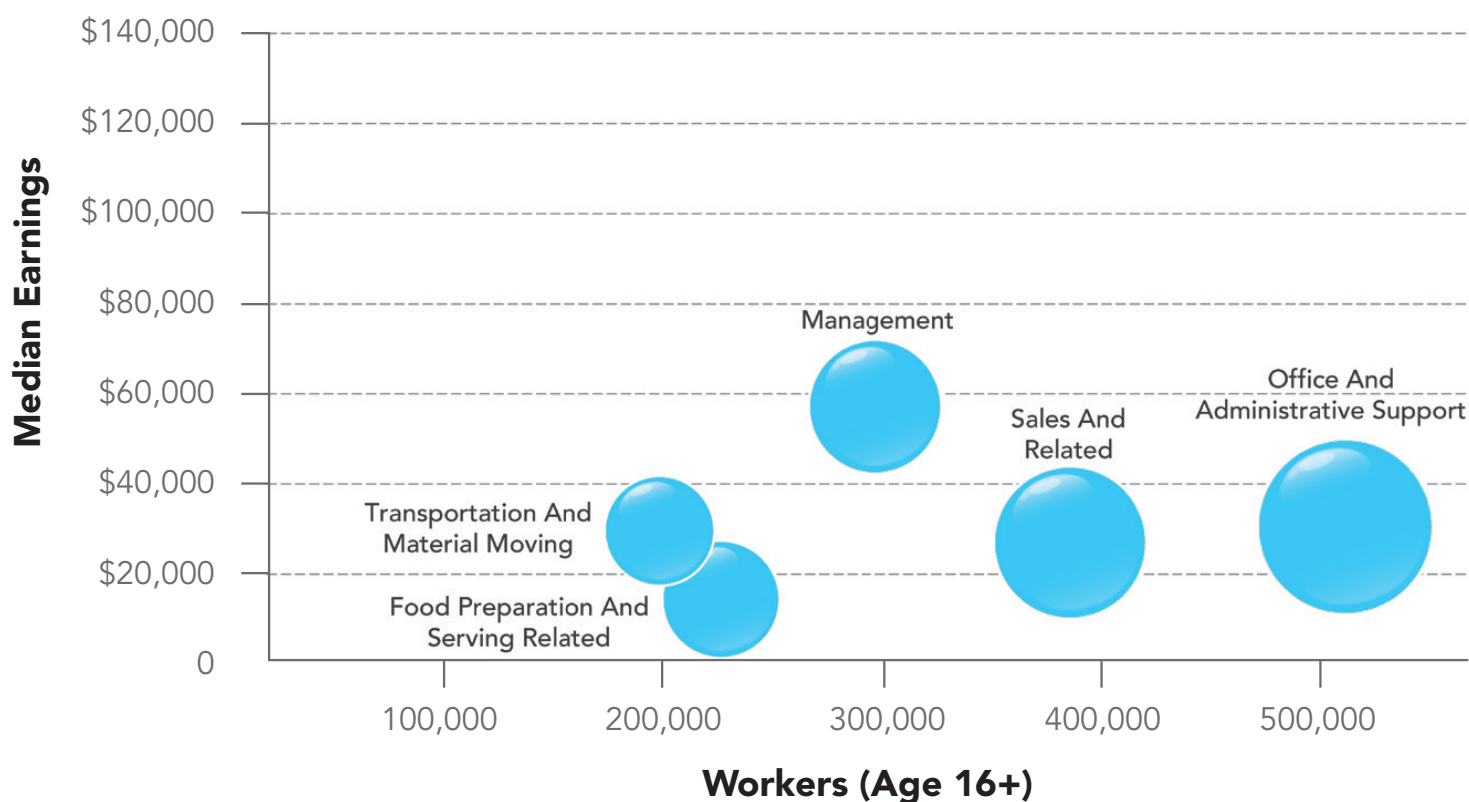
# 8C LifeMode Group: Middle Ground Bright Young Professionals

## Market Profile

- Own retirement savings and student loans.
- Own newer computers (desktop, laptop, or both), iPods, and 2+ TVs.
- Go online and use mobile devices for banking, access YouTube or Facebook, visit blogs, download movies, and play games.
- Use cell phones to text, redeem mobile coupons, listen to music, and check for news and financial information.
- Find leisure going to bars/clubs, attending concerts, going to the beach, and renting DVDs from Redbox or Netflix.
- Enjoy a variety of sports, including backpacking, rock climbing, football, Pilates, running, and yoga.
- Eat out often at fast-food and family restaurants.

## OCCUPATION BY EARNINGS

The five occupations with the highest number of workers in the market are displayed by median earnings. Data from the Census Bureau's American Community Survey.





# About The Retail Coach®

The Retail Coach is a national retail recruitment and development firm that combines strategy, technology, and creative expertise to develop and deliver high-impact retail recruitment and development plans to local governments, chambers of commerce, economic development organizations and private developers.

Through its unique Retail360® Process, The Retail Coach offers a dynamic system of products and services that better enable communities to maximize their retail development potential.

## Retail:360® Process

Providing more than simple data reports of psychographic and demographic trends, The Retail Coach goes well beyond other retail consulting and market research firms' offerings by combining current national and statewide demographics and trend data with real-world, "on-the-ground" information gathered through extensive visits to our clients' communities. Every community is different, and there is no "one size fits all" retail recruitment solution. Compiling the gathered data into client-tailored information packets that are uniquely designed for, and targeted to, specific retailers and restaurants who meet the community's needs help assure our clients that they are receiving the latest and best information for targeted retail recruitment efforts — all with personal service and coaching guidance that continues beyond the initial project scope and timeline.

Our Retail:360® Process assures that communities get timely, accurate and relevant information. Translating that data into the information that retailers need and seek assures our clients even better possibilities for tremendous retail growth and success.



The**Retail**Coach®

## ACKNOWLEDGMENTS

The observations, conclusions and recommendations contained in this study are solely those of The Retail Coach, LLC and should not be construed to represent the opinions of others, including its clients, or any other entity prior to such entity's express approval of this study.

All information furnished is from sources deemed reliable and is submitted subject to errors, omissions, change of terms and/or conditions.

Sources used in completing this study include: infoUSA™, Applied Geographic Solutions, Environics Analytics, ESRI, U.S. Census Bureau, Economy.com, Placer.AI, Spatial Insights Inc., Urban Land Institute, CensusViewer.com, International Council of Shopping Centers, and/or U.S. Bureau of Labor and Statistics. To better represent current data, where applicable, portions of estimated actual sales may be calculated using an average sales per square foot model. Mapping data is provided by Google, Nielsen, ESRI and/or Microsoft Corporation.

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