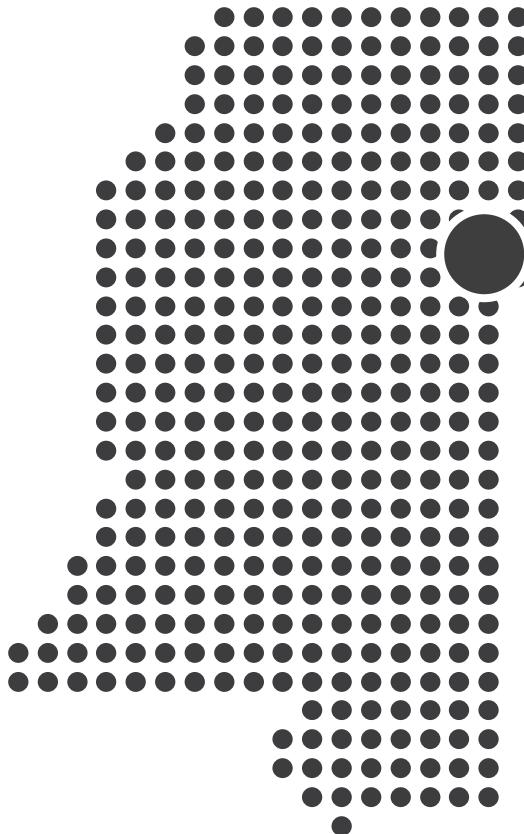


RETAIL OPPORTUNITY ANALYSIS

2017



COLUMBUS, MS

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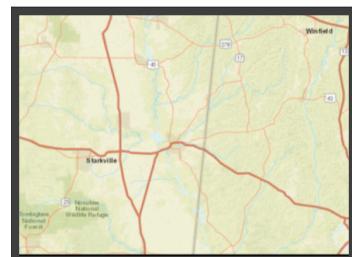
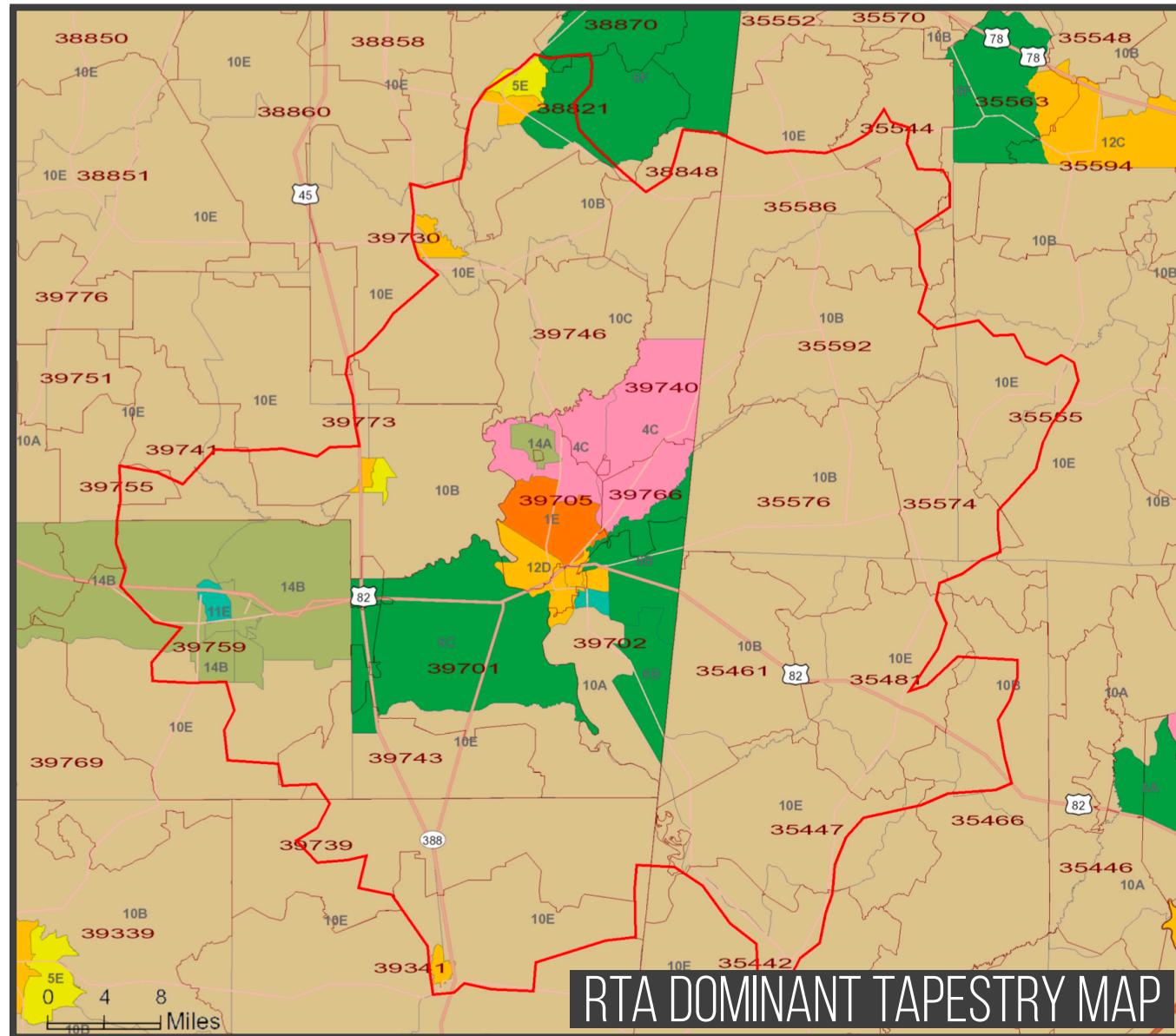
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RETAIL OPPORTUNITY/GAP ANALYSIS

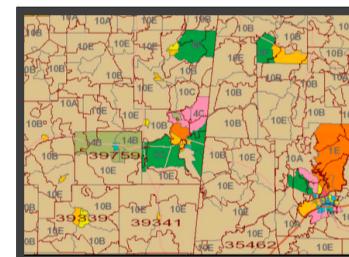
A RETAIL OPPORTUNITY OR “GAP” ANALYSIS TELLS US WHAT AMOUNT OF SALES A COMMUNITY MAKES IN RETAIL & RESTAURANT SALES VS. THE POTENTIAL FOR SALES IF THEY CAPTURE THEIR ENTIRE RETAIL TRADE AREA. WHEN THERE IS POTENTIAL TO MAKE MORE SALES IN A GIVEN SECTOR THIS IS KNOWN AS “SALES LEAKAGE”. IF A COMMUNITY BRINGS IN MORE THAN THEIR CALCULATED POTENTIAL IN A PARTICULAR SECTOR THEY HAVE A “SALES SURPLUS” IN THAT SECTOR. THROUGH BUILDING ACTIONABLE STRATEGIES BASED OFF OF THIS INFORMATION WE ARE ABLE TO CREATE THE HIGHEST OPPORTUNITY FOR SALES REVENUE AND BUSINESS SUCCESS AS WELL AS AMENITIES THAT THE RESIDENTS OF THE AREA ENJOY AND APPRECIATE.

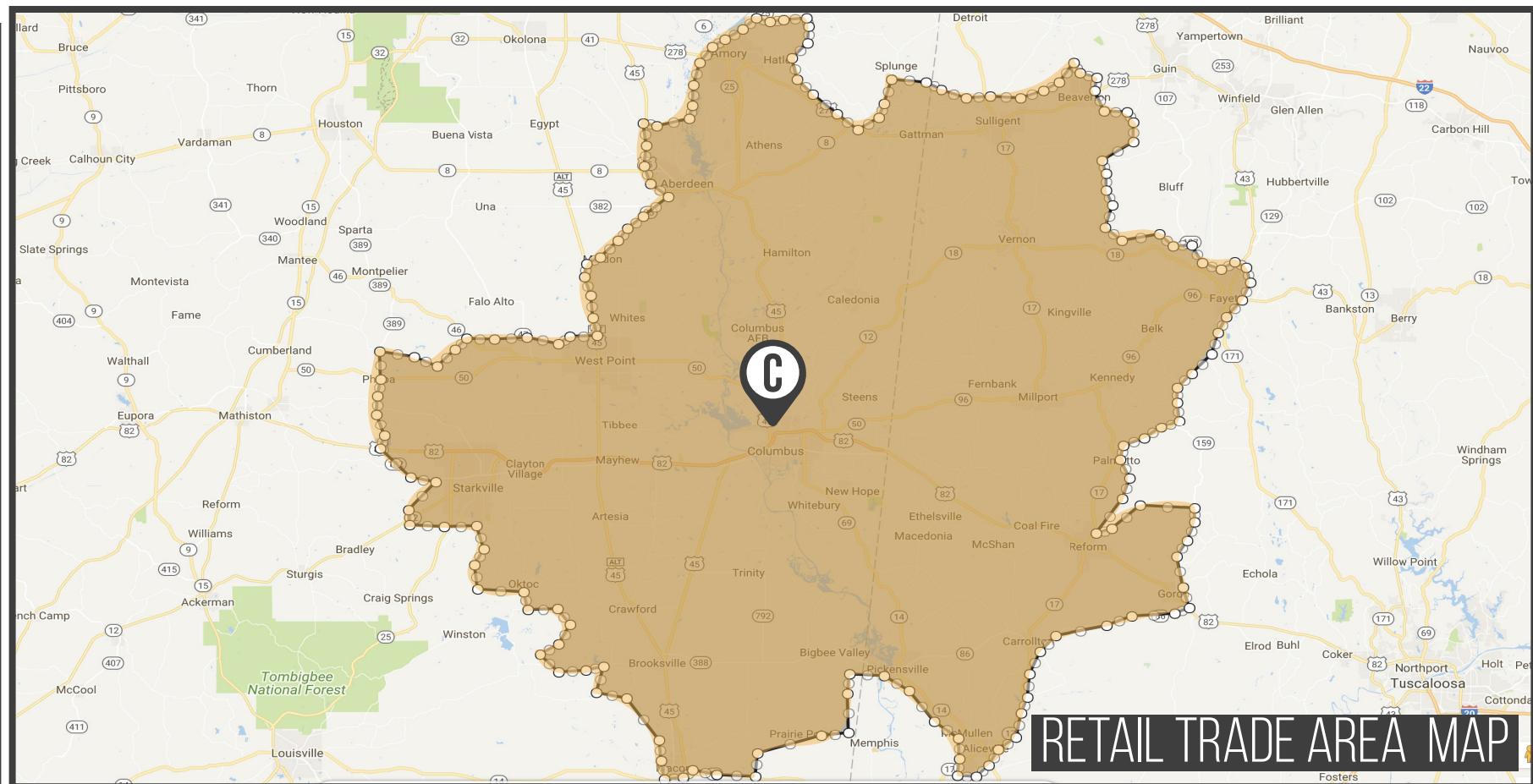
GAP=RTA POTENTIAL SALES-COMMUNITY ACTUAL SALES



Tapestry LifeMode

- L1: Affluent Estates
- L2: Upscale Avenues
- L3: Uptown Individuals
- L4: Family Landscapes
- L5: GenXurban
- L6: Cozy Country
- L7: Ethnic Enclaves
- L8: Middle Ground
- L9: Senior Styles
- L10: Rustic Outposts
- L11: Midtown Singles
- L12: Hometown
- L13: Next Wave
- L14: Scholars and Patriots





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Industry Summary	NAICS	Potential Sales (RTA)	Actual Sales (Community)	Leakage/Surplus
TOTAL RETAIL TRADE AND FOOD & DRINK	44-45,722	\$1,845,639,489	\$678,651,150	\$1,166,988,339
TOTAL RETAIL TRADE	44-45	\$1,681,129,574	\$605,658,263	\$1,075,471,311
TOTAL FOOD & DRINK	7222,473	\$164,509,915	\$72,992,887	\$91,517,028
MOTOR VEHICLE & PARTS DEALERS	441	\$381,576,097	\$123,179,262	\$258,396,835
AUTOMOBILE DEALERS	4411	\$309,943,552	\$89,632,476	\$220,311,076
OTHER MOTOR VEHICLE DEALERS	4412	\$37,222,373	\$3,259,075	\$33,963,298
AUTO PARTS, ACCESSORIES & TIRE STORES	4413	\$34,410,173	\$30,287,711	\$4,122,462
FURNITURE & HOME FURNISHINGS STORES	442	\$55,897,755	\$8,519,379	\$47,378,376
FURNITURE STORES	4421	\$37,898,433	\$7,228,138	\$30,670,295
HOME FURNISHINGS STORES	4422	\$17,999,321	\$1,291,241	\$16,708,080
ELECTRONICS & APPLIANCE STORES	443	\$38,226,442	\$10,889,544	\$27,336,898
BLDG MATERIALS, GARDEN EQUIP. & SUPPLY STORES	444	\$111,827,394	\$30,203,440	\$81,623,954
BLDG MATERIAL & SUPPLIES DEALERS	4441	\$105,154,058	\$29,788,798	\$75,365,260
LAWN & GARDEN EQUIP & SUPPLY STORES	4442	\$6,673,336	\$414,642	\$6,258,694
FOOD & BEVERAGE STORES	445	\$270,679,099	\$119,455,165	\$151,223,934
GROCERY STORES	4451	\$242,148,851	\$111,809,892	\$130,338,959
SPECIALTY FOOD STORES	4452	\$11,474,681	\$1,902,865	\$9,571,816
BEER, WINE & LIQUOR STORES	4453	\$17,055,567	\$5,742,408	\$11,313,159
HEALTH & PERSONAL CARE STORES	4,464,461	\$101,402,465	\$46,660,820	\$54,741,645
GASOLINE STATIONS	4,474,471	\$225,043,780	\$42,321,292	\$182,722,488
CLOTHING & CLOTHING ACCESSORIES STORES	448	\$53,283,571	\$32,779,498	\$20,504,073
CLOTHING STORES	4481	\$35,759,695	\$23,449,191	\$12,310,504

Industry Summary	NAICS	Potential Sales (RTA)	Actual Sales (Community)	Leakage/Surplus
SHOE STORES	4482	\$9,306,171	\$4,944,535	\$4,361,636
JEWELRY, LUGGAGE & LEATHER GOODS STORES	4483	\$8,217,705	\$4,385,772	\$3,831,933
SPORTING GOODS, HOBBY, BOOK & MUSIC STORES	451	\$42,015,760	\$22,432,741	\$19,583,019
SPORTING GOODS/HOBBY/MUSICAL INSTR STORES	4511	\$35,529,366	\$20,510,488	\$15,018,878
BOOK, PERIODICAL & MUSIC STORES	4512	\$6,486,395	\$1,922,253	\$4,564,142
GENERAL MERCHANDISE STORES	452	\$307,428,927	\$144,680,266	\$162,748,661
DEPARTMENT STORES EXCLUDING LEASED DEPTS.	4521	\$221,618,530	\$129,536,250	\$92,082,280
OTHER GENERAL MERCHANDISE STORES	4529	\$85,810,397	\$15,144,016	\$70,666,381
MISCELLANEOUS STORE RETAILERS	453	\$71,300,912	\$20,935,585	\$50,365,327
FLORISTS	4531	\$3,092,802	\$619,820	\$2,472,982
OFFICE SUPPLIES, STATIONERY & GIFT STORES	4532	\$18,727,937	\$3,823,636	\$14,904,301
USED MERCHANDISE STORES	4533	\$7,022,489	\$1,476,365	\$5,546,124
OTHER MISCELLANEOUS STORE RETAILERS	4539	\$42,457,684	\$15,015,764	\$27,441,920
NONSTORE RETAILERS	454	\$22,447,372	\$3,601,271	\$18,846,101
ELECTRONIC SHOPPING & MAIL-ORDER HOUSES	4541	\$12,854,728	\$0	\$12,854,728
VENDING MACHINE OPERATORS	4542	\$2,482,135	\$497,331	\$1,984,804
DIRECT SELLING ESTABLISHMENTS	4543	\$7,110,509	\$3,103,940	\$4,006,569
FOOD SERVICES & DRINKING PLACES	722	\$164,509,915	\$72,992,887	\$91,517,028
SPECIAL FOOD SERVICES	7223	\$1,702,179	\$911,735	\$790,444
DRINKING PLACES - ALCOHOLIC BEVERAGES	7224	\$3,266,526	\$194,816	\$3,071,710
RESTAURANTS/OTHER EATING PLACES	7225	\$159,541,209	\$71,886,336	\$87,654,873

Tapestry LifeMode Groups	2017 Households			2017 Adult Population		
	NUMBER	PERCENT	INDEX	NUMBER	PERCENT	INDEX
TOTAL:	73,438	100.0%		148,324	100.0%	
1. AFFLUENT ESTATES	874	1.2%	12	1,710	1.2%	11
TOP TIER (1A)	0	0.0%	0	0	0.0%	0
PROFESSIONAL PRIDE (1B)	0	0.0%	0	0	0.0%	0
BOOMBURBS (1C)	0	0.0%	0	0	0.0%	0
SAVVY SUBURBANITES (1D)	0	0.0%	0	0	0.0%	0
EXURBANITES (1E)	874	1.2%	61	1,710	1.2%	59
2. UPSCALE AVENUES	0	0.0%	0	0	0.0%	0
URBAN CHIC (2A)	0	0.0%	0	0	0.0%	0
PLEASANTVILLE (2B)	0	0.0%	0	0	0.0%	0
PACIFIC HEIGHTS (2C)	0	0.0%	0	0	0.0%	0
ENTERPRISING PROFESSIONALS (2D)	0	0.0%	0	0	0.0%	0
3. UPTOWN INDIVIDUALS	0	0.0%	0	0	0.0%	0
LAPTOPS AND LATTES (3A)	0	0.0%	0	0	0.0%	0
METRO RENTERS (3B)	0	0.0%	0	0	0.0%	0
TRENDSETTERS (3C)	0	0.0%	0	0	0.0%	0
4. FAMILY LANDSCAPES	2,759	3.8%	50	5,613	3.8%	49
SOCcer MOMS (4A)	0	0.0%	0	0	0.0%	0
HOME IMPROVEMENT (4B)	0	0.0%	0	0	0.0%	0
MIDDLEBURG (4C)	2,759	3.8%	132	5,613	3.8%	133
5. GENXURBAN	5,112	7.0%	61	9,912	6.7%	61
COMFORTABLE EMPTY NESTERS (5A) (5A)	859	1.2%	48	1,742	1.2%	48
IN STYLE (5B)	1,125	1.5%	68	2,085	1.4%	67
PARKS AND REC (5C)	0	0.0%	0	0	0.0%	0
RUSTBELT TRADITIONS (5D)	0	0.0%	0	0	0.0%	0
MIDLIFE CONSTANTS (5E)	3,128	4.3%	171	6,085	4.1%	174

DATA NOTE: THIS REPORT IDENTIFIES NEIGHBORHOOD SEGMENTS IN THE AREA, AND DESCRIBES THE SOCIOECONOMIC QUALITY OF THE IMMEDIATE NEIGHBORHOOD. THE INDEX IS A COMPARISON OF THE PERCENT OF HOUSEHOLDS OR TOTAL POPULATION 18+ IN THE AREA, BY TAPESTRY SEGMENT, TO THE PERCENT OF HOUSEHOLDS OR TOTAL POPULATION 18+ IN THE UNITED STATES, BY SEGMENT. AN SPENDING POTENTIAL INDEX OF 100 IS THE US AVERAGE.

Tapestry LifeMode Groups	2017 Households			2017 Adult Population		
	NUMBER	PERCENT	INDEX	NUMBER	PERCENT	INDEX
TOTAL:	73,438	100.0%		148,324	100.0%	
6. COZY COUNTRY LIVING	8,179	11.1%	93	16,408	11.1%	94
GREEN ACRES (6A)	527	0.7%	23	1,128	0.8%	23
SALT OF THE EARTH (6B)	5,577	7.6%	264	11,223	7.6%	262
THE GREAT OUTDOORS (6C)	706	1.0%	62	1,394	0.9%	62
PRAIRIE LIVING (6D)	0	0.0%	0	0	0.0%	0
RURAL RESORT DWELLERS (6E)	0	0.0%	0	0	0.0%	0
HEARTLAND COMMUNITIES (6F)	1,369	1.9%	81	2,663	1.8%	83
7. ETHNIC ENCLAVES	0	0.0%	0	0	0.0%	0
UP AND COMING FAMILIES (7A)	0	0.0%	0	0	0.0%	0
URBAN VILLAGES (7B)	0	0.0%	0	0	0.0%	0
AMERICAN DREAMERS (7C)	0	0.0%	0	0	0.0%	0
BARRIOS URBANOS (7D)	0	0.0%	0	0	0.0%	0
VALLEY GROWERS (7E)	0	0.0%	0	0	0.0%	0
SOUTHWESTERN FAMILIES (7F)	0	0.0%	0	0	0.0%	0
8. MIDDLE GROUND	3,109	4.2%	39	5,731	3.9%	38
CITY LIGHTS (8A)	0	0.0%	0	0	0.0%	0
EMERALD CITY (8B)	0	0.0%	0	0	0.0%	0
BRIGHT YOUNG PROFESSIONALS (8C)	0	0.0%	0	0	0.0%	0
DOWNTOWN MELTING POT (8D)	0	0.0%	0	0	0.0%	0
FRONT PORCHES (8E)	769	1.0%	66	1,439	1.0%	64
OLD AND NEWCOMERS (8F)	1,916	2.6%	112	3,544	2.4%	119
HARDSCRABBLE ROAD (8G)	424	0.6%	47	748	0.5%	43
9. SENIOR STYLES	789	1.1%	19	1,442	1.0%	19
SILVER & GOLD (9A)	0	0.0%	0	0	0.0%	0
GOLDEN YEARS (9B)	0	0.0%	0	0	0.0%	0
THE ELDERS (9C)	0	0.0%	0	0	0.0%	0
SENIOR ESCAPES (9D)	0	0.0%	0	0	0.0%	0
RETIREMENT COMMUNITIES (9E)	789	1.1%	88	1,442	1.0%	95
SOCIAL SECURITY SET (9F)	0	0.0%	0	0	0.0%	0

Tapestry LifeMode Groups	2017 Households			2017 Adult Population		
	NUMBER	PERCENT	INDEX	NUMBER	PERCENT	INDEX
TOTAL:	73,438	100.0%		148,324	100.0%	
10. RUSTIC OUTPOSTS	26,573	36.2%	439	54,152	36.5%	439
SOUTHERN SATELLITES (10A)	3,019	4.1%	131	6,137	4.1%	131
ROOTED RURAL (10B)	8,511	11.6%	587	16,781	11.3%	579
DINERS & MINERS (10C)	845	1.2%	175	1,703	1.0%	176
DOWN THE ROAD (10D)	658	0.9%	78	1,282	0.9%	75
RURAL BYPASSES (10E)	13,540	18.4%	1,379	28,249	19.0%	1,369
11. MIDTOWN SINGLES	5,367	7.3%	117	9,467	6.4%	116
CITY STRIVERS (11A)	0	0.0%	0	0	0.0%	0
YOUNG AND RESTLESS (11B)	435	0.6%	34	603	0.4%	29
METRO FUSION (11C)	0	0.0%	0	0	0.0%	0
SET TO IMPRESS (11D)	2,194	3.0%	215	3,766	2.5%	213
CITY COMMONS (11E)	2,738	3.7%	415	5,098	3.4%	426
12. HOMETOWN	10,003	13.6%	220	19,823	13.4%	228
FAMILY FOUNDATIONS (12A)	934	1.3%	121	1,905	1.3%	119
TRADITIONAL LIVING (12B)	784	1.1%	55	1,383	0.9%	51
SMALL TOWN SIMPLICITY (12C)	2,360	3.2%	172	4,357	2.9%	174
MODEST INCOME HOMES (12D)	5,925	8.1%	610	12,178	8.2%	647
13. NEXT WAVE	0	0.0%	0	0	0.0%	0
INTERNATIONAL MARKETPLACE (13A)	0	0.0%	0	0	0.0%	0
LAS CASAS (13B)	0	0.0%	0	0	0.0%	0
NEWEST RESIDENTS (13C)	0	0.0%	0	0	0.0%	0
FRESH AMBITIONS (13D)	0	0.0%	0	0	0.0%	0
HIGH RISE RENTERS (13E)	0	0.0%	0	0	0.0%	0
14. SCHOLARS AND PATRIOTS	10,673	14.5%	897	24,066	16.2%	707
MILITARY PROXIMITY (14A)	621	0.8%	558	1,014	0.7%	251
COLLEGE TOWNS (14B)	8,913	12.1%	1,271	20,698	14.0%	1,346
DORMS TO DIPLOMAS (14C)	1,139	1.6%	303	2,354	1.6%	161

ACKNOWLEDGEMENTS

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IN ORDER TO OBTAIN CURRENT DATA ESTIMATES, PORTIONS OF ESTIMATED ACTUAL SALES MAY BE CALCULATED VIA AVERAGE SALES PER SQUARE FOOT EQUATIONS.

*REPORT COMPLETED BY BRICK+MORTAR, LLC (DECEMBER, 2017)

