



TheRetailCoach®

RETAIL TRADE AREA PSYCHOGRAPHIC PROFILE

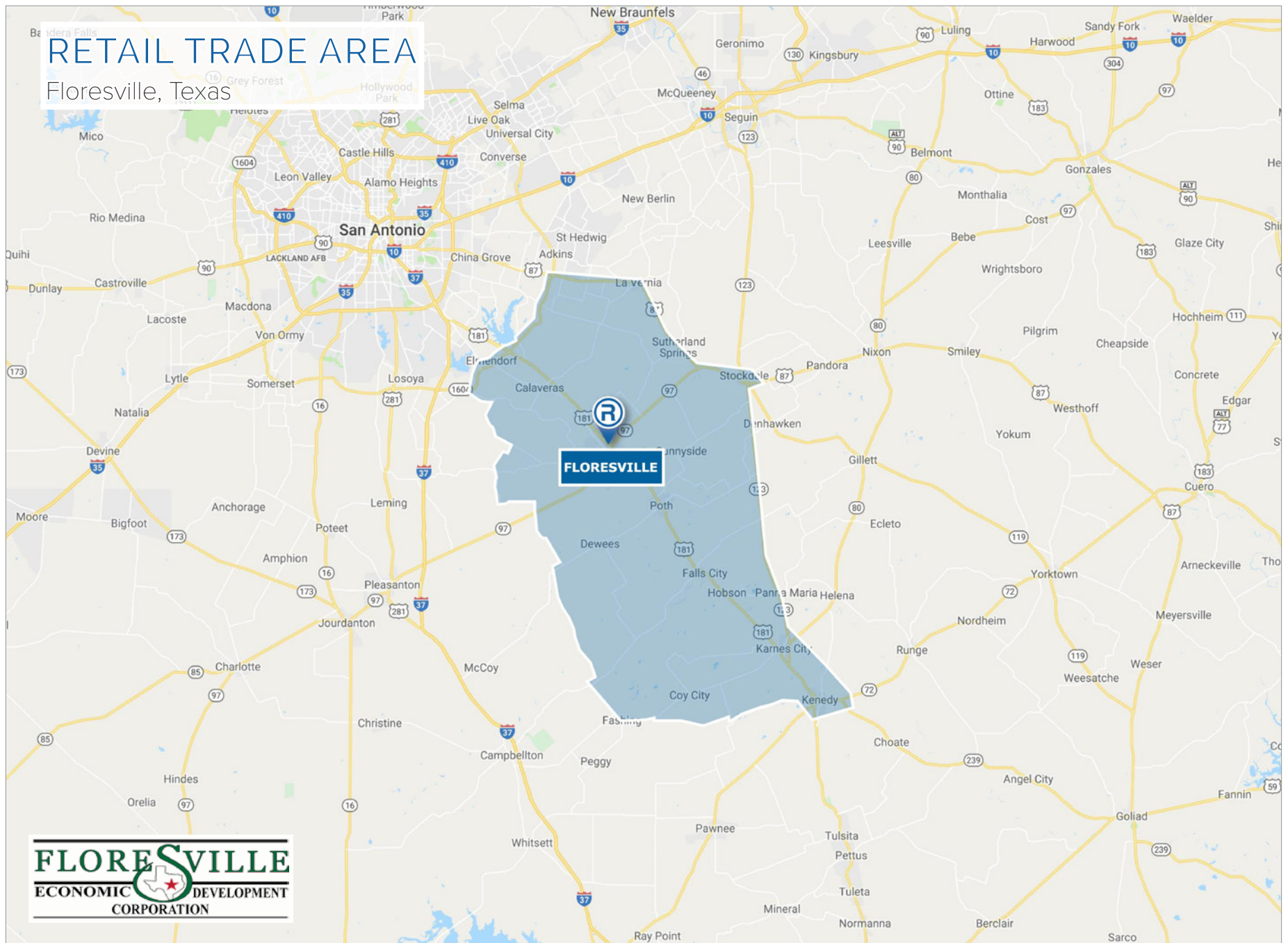
Floresville, Texas

Prepared for
Floresville Economic Development Corporation
December 2018



RETAIL TRADE AREA

Floresville, Texas



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TheRetailCoach®

TAPESTRY SEGMENTATION PROFILE

+ WHAT IS TAPESTRY SEGMENTATION?

Tapestry Segmentation is a market segmentation system that classifies US neighborhoods based on their socioeconomic and demographic compositions. Tapestry is a system for classifying consumers and constituents using all the variables that can distinguish consumer behavior, from household characteristics such as income and family type to personal traits like age, education, or employment and even housing choices.

Tapestry Segmentation classifies US neighborhoods into 67 distinct market segments. Neighborhoods with the most similar characteristics are grouped together, while neighborhoods with divergent characteristics are separated. Tapestry Segmentation combines the “who” of lifestyle demography with the “where” of local neighborhood geography to create a model of various lifestyle classifications, or segments, of actual neighborhoods with addresses—distinct behavioral market segments.

+ WHO SHOULD USE TAPESTRY SEGMENTATION?

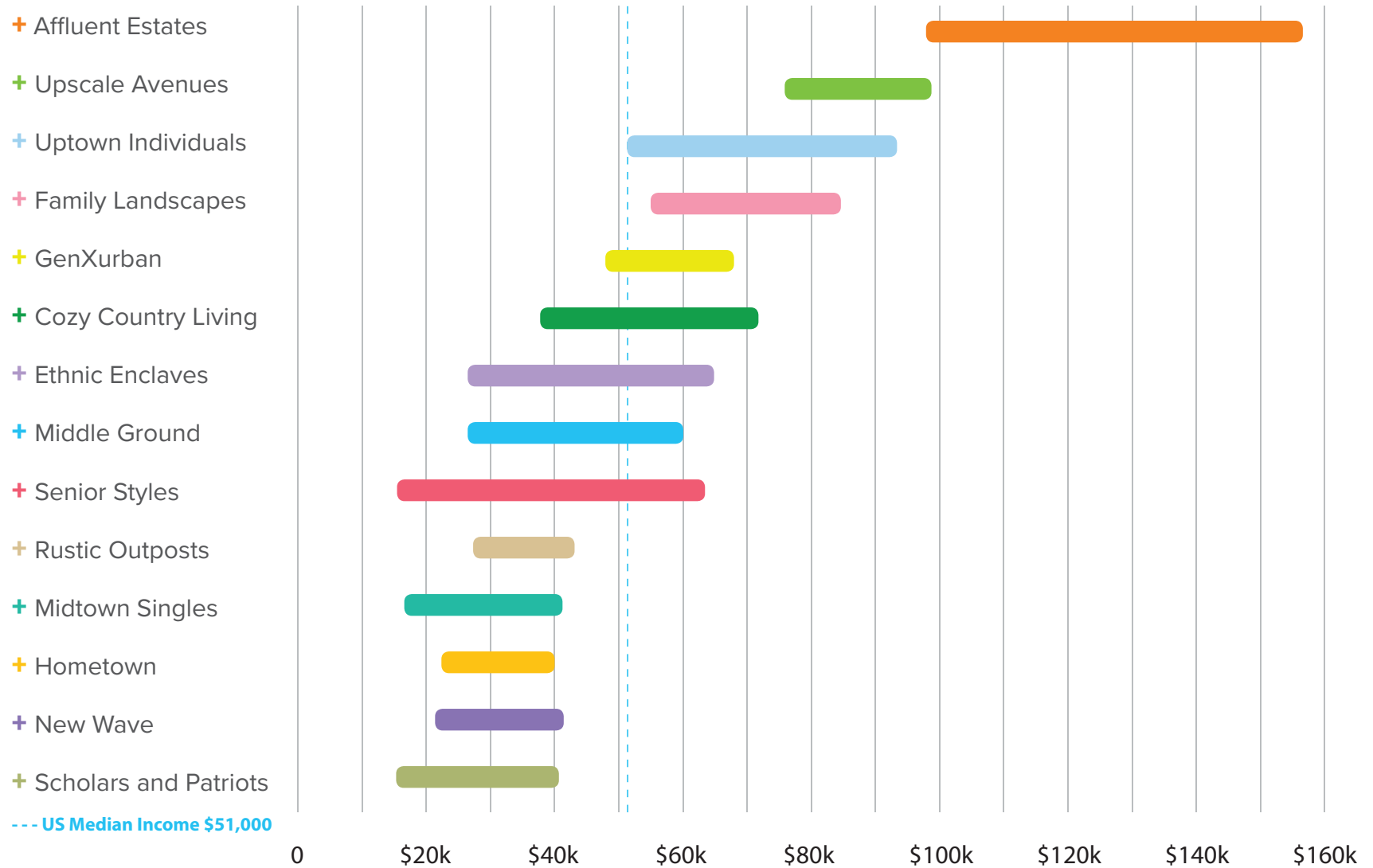
All companies, agencies, and organizations need to understand consumers/constituents in order to supply them with the right products and services and to reach them via their preferred media. These applications require a robust segmentation system that can accurately profile these diverse markets. The versatility and predictive power of Tapestry Segmentation allow users to integrate their own data or national consumer surveys into Tapestry Segmentation to identify their best market segments and reach them through the most effective channels.

+ TAPESTRY SEGMENTATION SUMMARY GROUPS

Esri's Tapestry Segmentation provides a robust, powerful portrait of the 67 US consumer markets. To provide a broader view of these 67 segments, Esri combined them into 14 LifeMode Summary Groups based on lifestyle and lifestage composition.

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

INCOME RANGE OF LIFEMODE SUMMARY GROUPS



Floresville, Texas

Established wealth — educated, well-traveled married couples

Prosperous, married couples
in higher density neighborhoods

Younger, urban singles on the move

Successful younger families in newer housing

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

Empty nesters in bucolic settings

Established diversity — young, Hispanic homeowners with families

Lifestyles of thirtysomethings

Senior lifestyles reveal the effects of saving for retirement

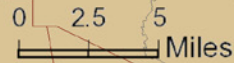
Country life with older families, older homes

Millennials on the move; single, diverse, and urban

Growing up and staying close to home;
single householders

Urban denizens; young, diverse,
hardworking families

College campuses and military neighborhoods



RETAIL TRADE AREA • TOP TAPESTRY SEGMENTS

Floresville, Texas

	TAPESTRY SEGMENTATION	HOUSEHOLDS PERCENT	CUMULATIVE PERCENT	US HOUSEHOLDS PERCENT	CUMULATIVE PERCENT	INDEX
1	Southern Satellites (10A)	31.1%	31.1%	3.1%	3.1%	993
2	Green Acres (6A)	28.7%	59.8%	3.2%	6.3%	897
3	Small Town Simplicity (12C)	6.4%	66.2%	1.9%	8.2%	346
4	Soccer Moms (4A)	4.6%	70.8%	2.9%	11.1%	159
5	Diners & Miners (10C)	4.0%	74.8%	0.7%	11.8%	610
	Subtotal	74.8%		11.8%		
6	Heartland Communities (6F)	3.5%	78.3%	2.3%	14.1%	150
7	Boomburbs (1C)	3.2%	81.5%	1.7%	15.8%	191
8	Prairie Living (6D)	3.2%	84.7%	1.1%	16.9%	299
9	Salt of the Earth (6B)	3.1%	87.8%	2.9%	19.8%	108
10	Southwestern Families (7F)	2.8%	90.6%	0.8%	20.6%	336
	Subtotal	15.8%		8.8%		
11	Savvy Suburbanites (1D)	2.5%	93.1%	3.0%	23.6%	86
12	Middleburg (4C)	2.0%	95.1%	2.9%	26.5%	68
13	Professional Pride (1B)	1.8%	96.9%	1.6%	28.1%	110
14	Rural Resort Dwellers (6E)	1.5%	98.4%	1.0%	29.1%	154
15	The Great Outdoors (6C)	0.9%	99.3%	1.6%	30.7%	59
	Subtotal	8.7%		10.1%		
16	Comfortable Empty Nesters (5A)	0.7%	100.0%	2.5%	33.2%	27
17	Down the Road (10D)	0.1%	100.1%	1.1%	34.3%	4
	Subtotal	0.8%		3.6%		
	Total	100.0%		34.1%		293



LifeMode Group • Rustic Outposts

10A

SOUTHERN SATELLITES

Southern Satellites is the second largest market found in rural settlements but within metropolitan areas located primarily in the South.

This market is typically nondiverse, slightly older, settled married-couple families, who own their homes. Almost two-thirds of the homes are single-family structures; a third are mobile homes. Median household income and home value are below average. Workers are employed in a variety of industries, such as manufacturing, health care, retail trade, and construction, with higher proportions in mining and agriculture than the US. Residents enjoy country living, preferring outdoor activities and DIY home projects.

US Household // 3,775,000

Average Household Size // 2.65

Median Age // 39.7

Median Household Income // \$44,000

+ OUR NEIGHBORHOOD

- About 79% of households are owned.
- Married couples with no children are the dominant household type, with a number of multigenerational households (Index 112).
- Most are single-family homes (65%), with a number of mobile homes (Index 523).
- Most housing units were built in 1970 or later.
- Most households own 1 or 2 vehicles, but owning 3+ vehicles is common (Index 146).



10A

+ MARKET PROFILE

(Consumer preferences are estimated from data by GfK MRI)

- Usually own a truck; likely to service it themselves.
- Frequent the convenience store, usually to fill up a vehicle with gas.
- Typical household has a satellite dish.
- Work on home improvement and remodeling projects.
- Own a pet, commonly a dog.
- Participate in fishing and hunting.
- Prefer to listen to country music and watch Country Music Television (CMT).
- Read fishing/hunting and home service magazines.
- Partial to eating at low-cost family restaurants and drive-ins.
- Use Walmart for all their shopping needs (groceries, clothing, pharmacy, etc.).

+ SOCIOECONOMIC TRAITS

- Education: almost 40% have a high school diploma only (Index 137); 41% have college education (Index 72).
- Unemployment rate is 9.2%, slightly higher than the US rate.
- Labor force participation rate is 59.7%, slightly lower than the US.
- These consumers are more concerned about cost rather than quality or brand loyalty.
- They tend to be somewhat late in adapting to technology.
- They obtain a disproportionate amount of their information from TV, compared to other media.

+ 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;
Mobile Homes

Median Value:

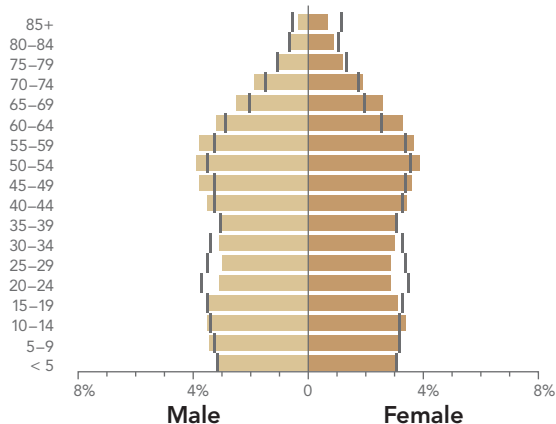
\$119,000
US Median: \$177,000



AGE BY SEX (Esri data)

Median Age: 39.7 US: 37.6

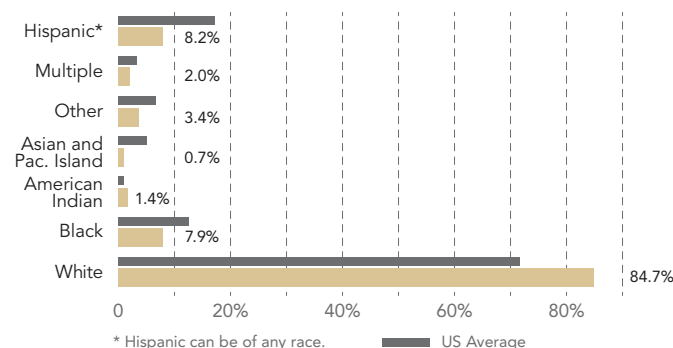
I Indicates US



RACE AND ETHNICITY (Esri data)

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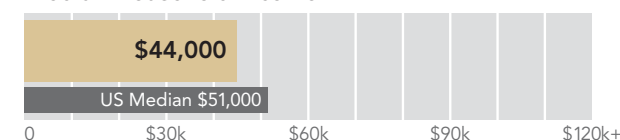
Diversity Index: 38.6 US: 62.1



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

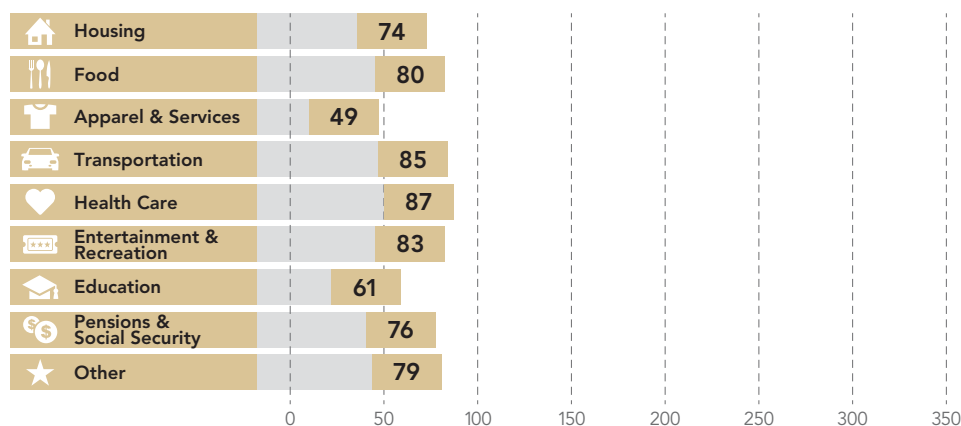


Median Net Worth



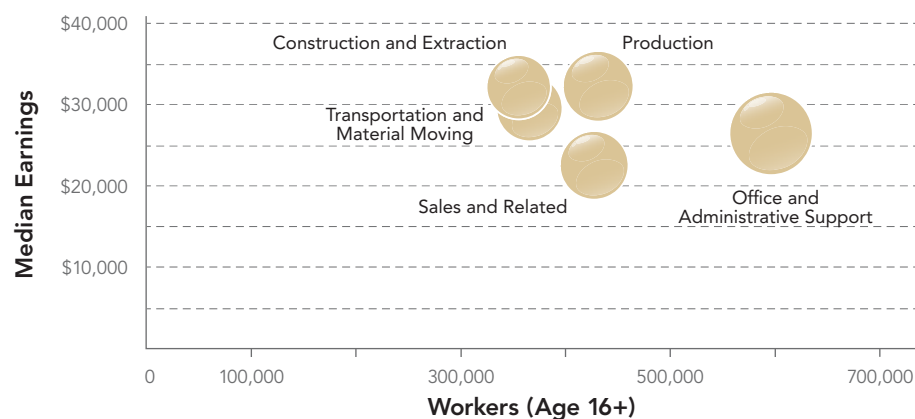
AVERAGE HOUSEHOLD BUDGET INDEX

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.



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.





LifeMode Group • Cozy Country Living

6A GREEN ACRES

The Green Acres lifestyle features country living and self-reliance.

They are avid do-it-yourselfers, maintaining and remodeling their homes, with all the necessary power tools to accomplish the jobs. Gardening, especially growing vegetables, is also a priority, again with the right tools, tillers, tractors, and riding mowers. Outdoor living also features a variety of sports: hunting and fishing, motorcycling, hiking and camping, and even golf. Self-described conservatives, residents of Green Acres remain pessimistic about the near future yet are heavily invested in it.

US Household // 3,794,000
Average Household Size // 2.69
Median Age // 43.0
Median Household Income // \$72,000

+ OUR NEIGHBORHOOD

- Rural enclaves in metropolitan areas, primarily (not exclusively) older homes with acreage; new housing growth in the past 10 years.
- Single-family, owner-occupied housing, with a median value of \$197,000.
- An older market, primarily married couples, most with no children.



+ MARKET PROFILE

(Consumer preferences are estimated from data by GfK MRI)

- Purchasing choices reflect Green Acres' residents country life, including a variety of vehicles from trucks and SUVs to ATVs and motorcycles, preferably late model.
- Homeowners favor DIY home improvement projects and gardening.
- Media of choice are provided by satellite service, radio, and television, also with an emphasis on country and home and garden.
- Green Acres residents pursue physical fitness vigorously, from working out on home exercise equipment to playing a variety of sports.
- Residents are active in their communities and a variety of social organizations, from fraternal orders to veterans' clubs.

+ SOCIOECONOMIC TRAITS

- Education: 60% are college educated.
- Unemployment is low at 6% (Index 70); labor force participation rate is high at 67.4% (Index 108).
- Income is derived not only from wages and salaries but also from self-employment (more than 15% of households), investments (30% of households), and increasingly, from retirement.
- They are cautious consumers with a focus on quality and durability.
- Comfortable with technology, more as a tool than a trend: banking or paying bills online is convenient; but the Internet is not viewed as entertainment.
- Economic outlook is professed as pessimistic, but consumers are comfortable with debt, primarily as home and auto loans, and investments.

+ 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

Median Value:

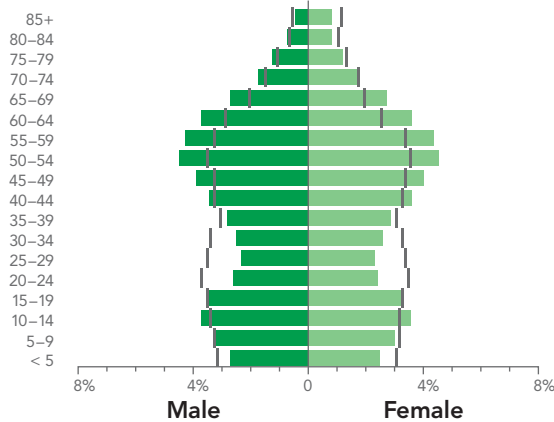
\$197,000

US Median: \$177,000

AGE BY SEX (Esri data)

Median Age: 43.0 US: 37.6

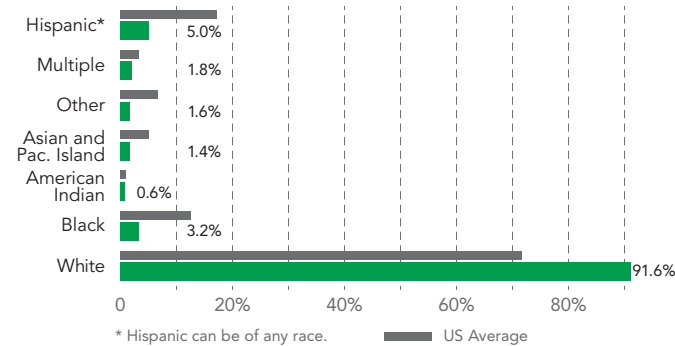
I Indicates US



RACE AND ETHNICITY (Esri data)

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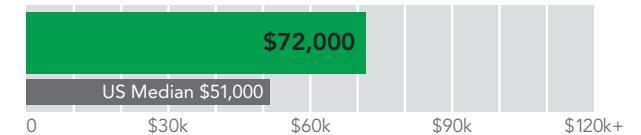
Diversity Index: 24.0 US: 62.1



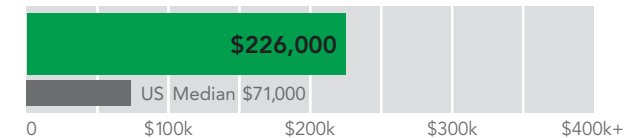
INCOME AND NET WORTH

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

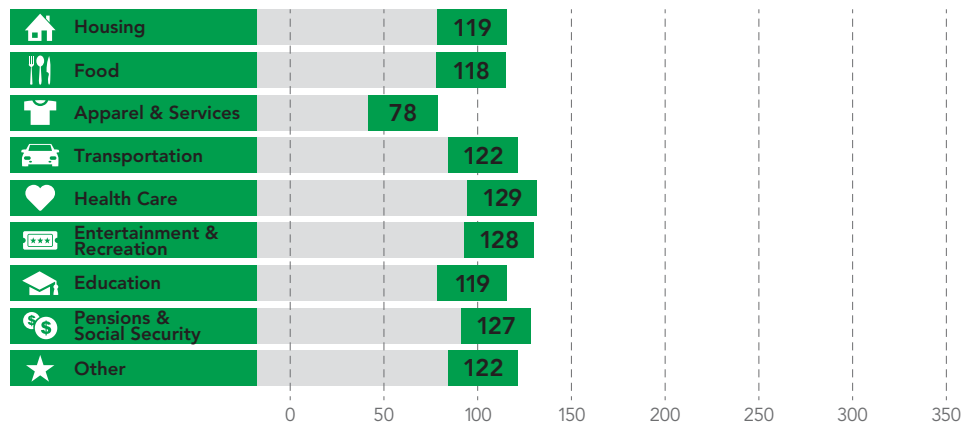


Median Net Worth



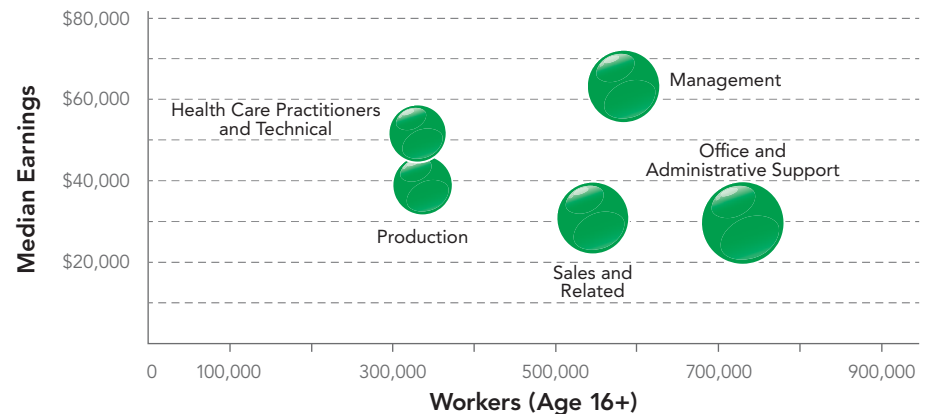
AVERAGE HOUSEHOLD BUDGET INDEX

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.



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.





LifeMode Group • Hometown

12C

SMALL TOWN SIMPLICITY

Small Town Simplicity includes young families and senior householders that are bound by community ties.

The lifestyle is down-to-earth and semirural, with television for entertainment and news, and emphasis on convenience for both young parents and senior citizens. Residents embark on pursuits including online computer games, scrapbooking, and rural activities like hunting and fishing. Since almost 1 in 4 households is below poverty level, residents also keep their finances simple—paying bills in person and avoiding debt.

US Household // 2,305,000
Average Household Size // 2.25
Median Age // 40.0
Median Household Income // \$27,000

+ OUR NEIGHBORHOOD

- They reside in small towns or semirural neighborhoods, mostly outside metropolitan areas.
- Homes are a mix of older single-family houses (61%), apartments, and mobile homes.
- A majority, 51%, of homes are owner occupied. (Index 80).
- Median home value of \$88,000 is about half the US median.
- Average rent is \$600 (Index 62).
- This is an older market, with almost half of the householders aged 55 years or older, and predominantly single-person households (Index 139).



12C

+ MARKET PROFILE

(Consumer preferences are estimated from data by GfK MRI)

- Small Town Simplicity features a semirural lifestyle, complete with trucks (domestic, of course), ATVs, and vegetable gardens.
- Hunting, fishing, and target shooting are favorite pastimes.
- A large senior population visit doctors and health practitioners regularly.
- However, a largely single population favors convenience over cooking—frozen meals and fast food.
- Home improvement is not a priority, but vehicle maintenance is.

+ SOCIOECONOMIC TRAITS

- Education: 65% with high school diploma or some college.
- Unemployment higher at 11.9% (Index 138).
- Labor force participation lower at 51% (Index 81), which could result from lack of jobs or retirement.
- Income from wages and salaries (Index 82), Social Security (Index 142) or retirement (Index 112), increased by Supplemental Security Income (Index 203).
- Price-conscious consumers that shop accordingly, with coupons at discount centers.
- Connected, but not to the latest or greatest gadgets; keep their landlines.
- Community-orientated residents; more conservative than middle-of-the-road.
- Rely on television or newspapers to stay informed.

+ HOUSING

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Typical Housing:

Single Family

Median Value:

\$88,000

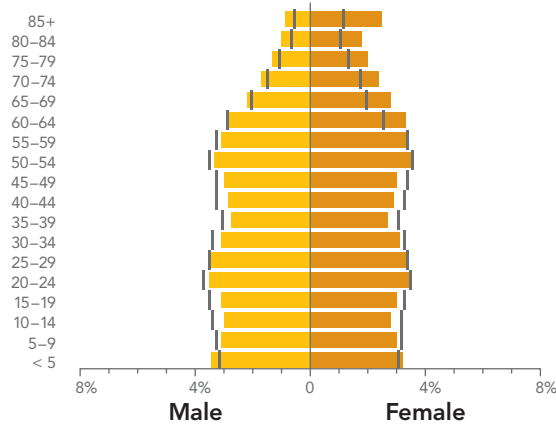
US Median: \$177,000



AGE BY SEX (Esri data)

Median Age: 40.0 US: 37.6

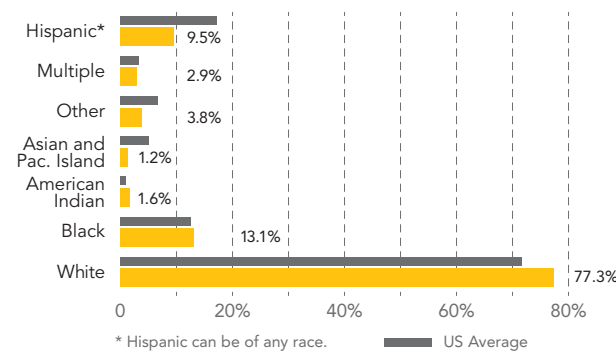
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RACE AND ETHNICITY (Esri data)

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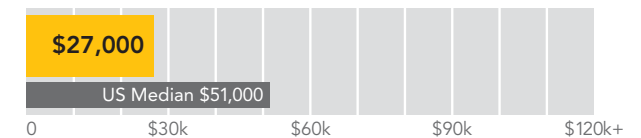
Diversity Index: 49.1 US: 62.1



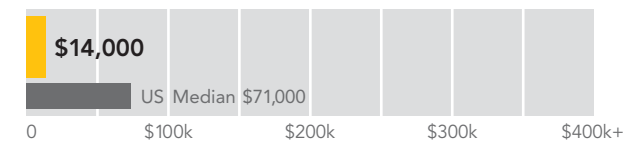
INCOME AND NET WORTH

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Median Household Income

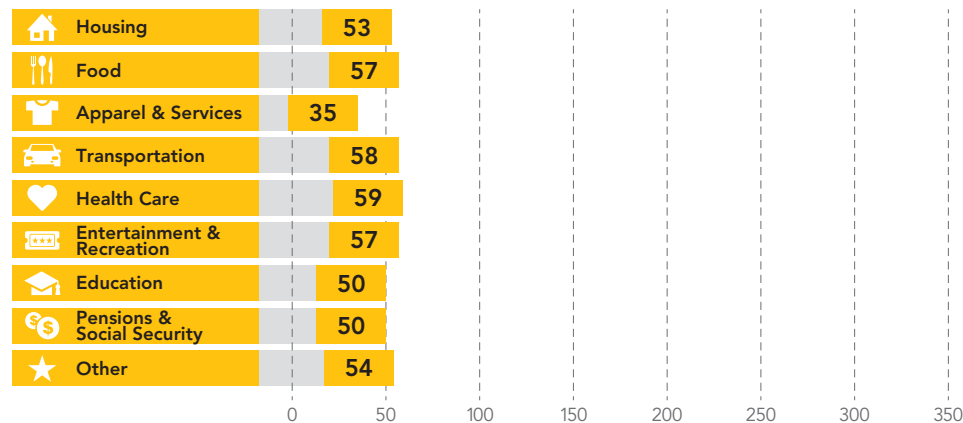


Median Net Worth



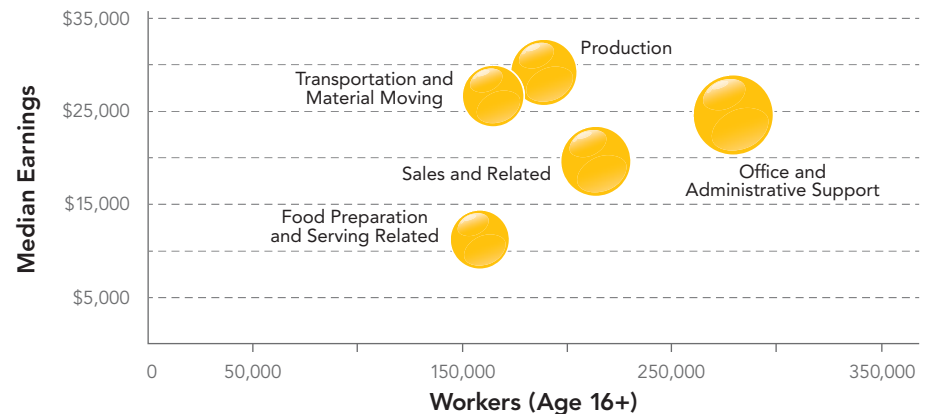
AVERAGE HOUSEHOLD BUDGET INDEX

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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.





LifeMode Group • Family Landscapes



SOCCER MOMS

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.

US Household // 3,327,000
Average Household Size // 2.96
Median Age // 36.6
Median Household Income // \$84,000

+ OUR NEIGHBORHOOD

- Soccer Moms residents prefer the suburban periphery of metropolitan areas.
- Predominantly single family, homes are in newer neighborhoods, 36% built in the 1990s (Index 253), 31% built since 2000.
- Owner-occupied homes have high rate of mortgages at 74% (Index 163), and low rate vacancy at 5%.
- Median home value is \$226,000.
- Most households are married couples with children; average household size is 2.96.
- Most households have 2 or 3 vehicles; long travel time to work including a disproportionate number commuting from a different county (Index 133).



4A

+ MARKET PROFILE

(Consumer preferences are estimated from data by GfK MRI)

- 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 165), 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, like bicycling, jogging, golfing, boating, and target shooting.
- Home maintenance services are frequently contracted, but these families also like their gardens and own the tools for minor upkeep, like riding mowers and tillers.

+ SOCIOECONOMIC TRAITS

- Education: 37.7% college graduates; more than 70% with some college education.
- Low unemployment at 5.9%; high labor force participation rate at 72%; 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 159) and second mortgages (Index 154) and auto loans (Index 151).

+ HOUSING

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Typical Housing:

Single Family

Median Value:

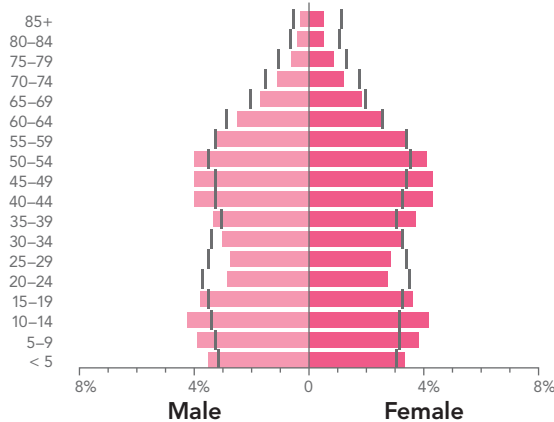
\$226,000

US Median: \$177,000

AGE BY SEX (Esri data)

Median Age: 36.6 US: 37.6

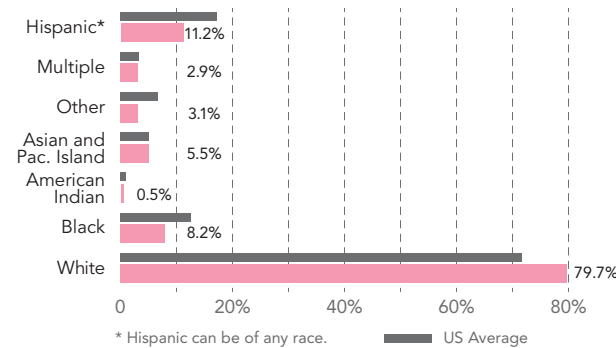
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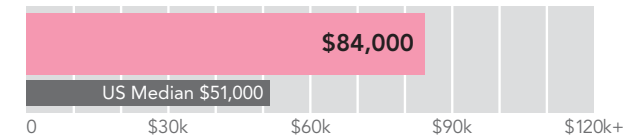
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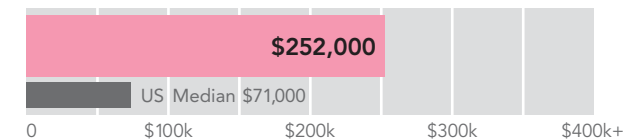
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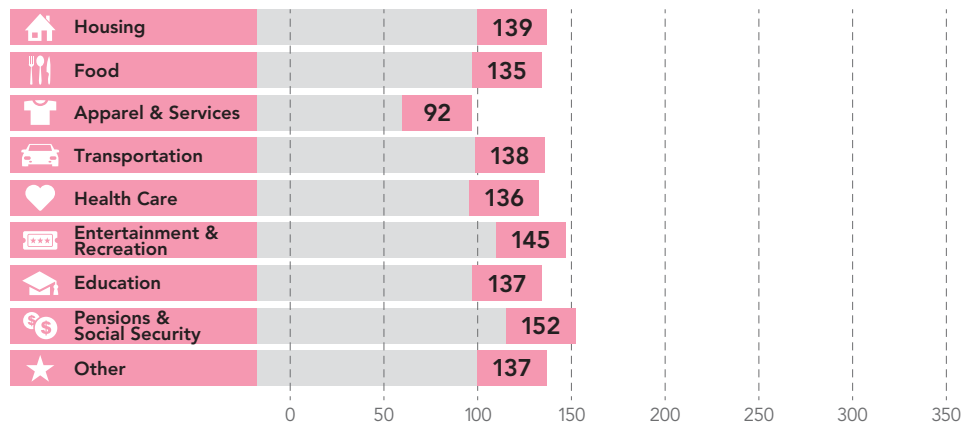


Median Net Worth



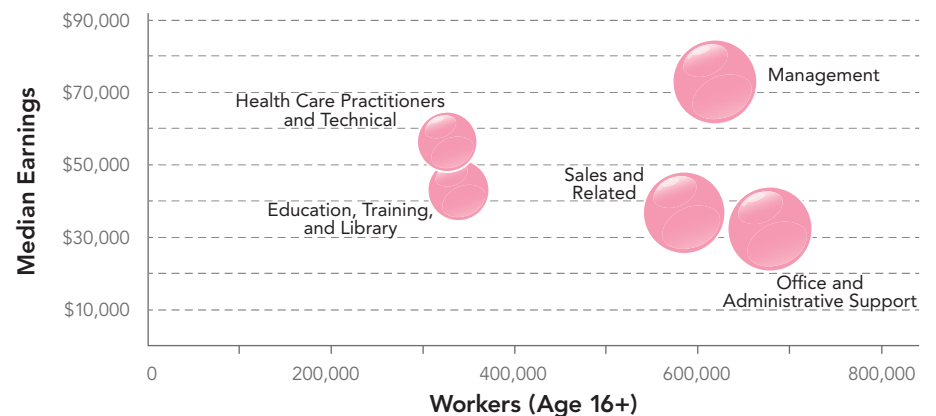
AVERAGE HOUSEHOLD BUDGET INDEX

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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.





LifeMode Group • Rustic Outposts

10C

DINERS AND MINERS

Close to one in five employed residents work in mining, oil and gas extraction, or quarrying industries.

Diners and Miners is a very rural, primarily Southern market. Married-couple families reside in over half of the households, and over a quarter of householders live in mobile homes. This socially conservative group earns a living working with their hands. In addition to mining, construction and agriculture are common industries for employment. They take pride in the appearance of their homes and their vehicles. Budget-minded residents enjoy home cooking, but nothing too fancy. This is a gregarious group that values time spent with friends.

US Household // 806,000

Average Household Size // 2.53

Median Age // 40.5

Median Household Income // \$37,000

+ OUR NEIGHBORHOOD

- Rural living; homes are sparsely located throughout the countryside.
- These families have roots in their communities and do not move often; over three-quarters of all households are owner occupied.
- Over half of owned homes are worth less than \$100,000.
- Married-couple families make up over half the households.
- Nearly a quarter of all housing units are mobile homes; the rest are primarily single-family dwellings.
- High-vacancy rate—nearly one in six housing units is vacant.



+ MARKET PROFILE

(Consumer preferences are estimated from data by GfK MRI)

- Own a domestic truck, dog, and ATV.
- Watch a lot of TV, including CMT and HSN.
- A few still hanging on to their landlines (no cell phones) and dial-up modems.
- Dine at Dairy Queen, KFC, Golden Corral, and Applebee's.
- Hunting, yard work, and gardening popular activities.
- Shop at department and discount stores—mostly Walmart.
- Many enrolled in Medicare and pick up prescriptions at the closest Walmart pharmacy.

+ SOCIOECONOMIC TRAITS

- They hold strong to religious beliefs.
- Most residents did not go to college.
- They are slow to adopt technology; “if it’s not broke, don’t fix it,” mentality.
- TV is the main source of information, news, and entertainment.
- They make purchases for today because tomorrow is uncertain.
- They are happy to go to work whenever the opportunity presents itself.
- Budgeted vacations are taken within the US, not abroad.

+ 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;
Mobile Homes

Median Value:

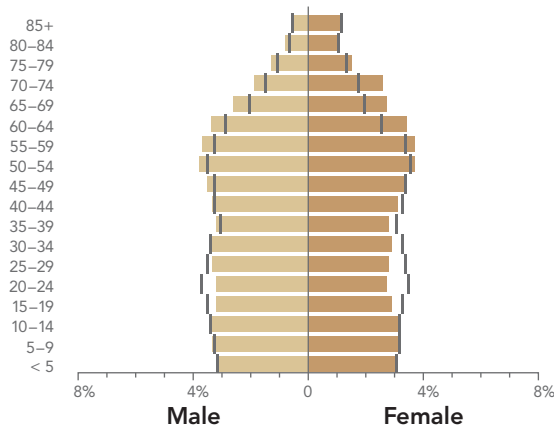
\$92,000
US Median: \$177,000



AGE BY SEX (Esri data)

Median Age: 40.5 US: 37.6

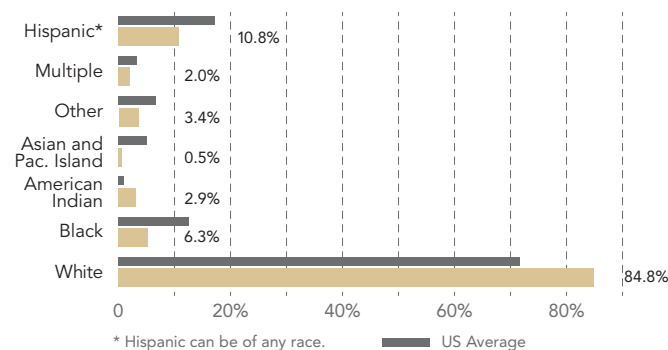
I Indicates US



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).

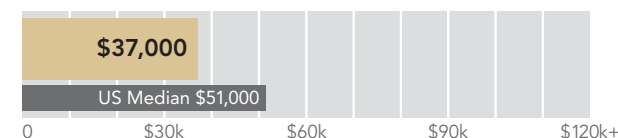
Diversity Index: 41.5 US: 62.1



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

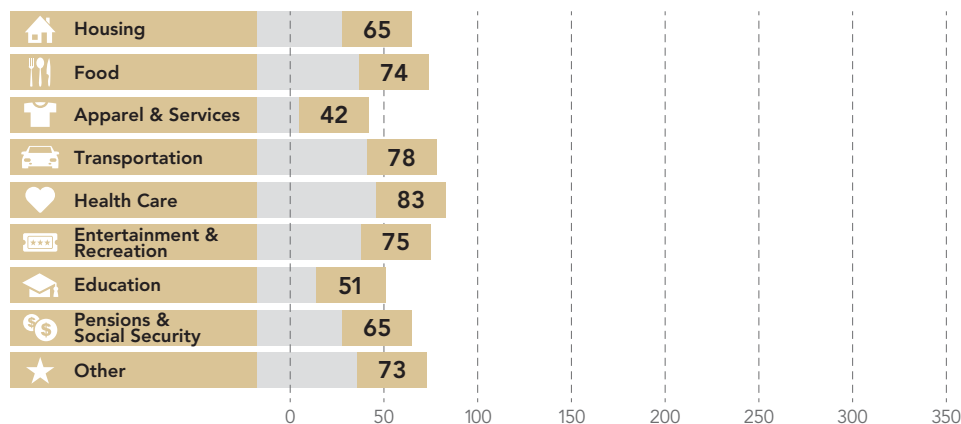


Median Net Worth



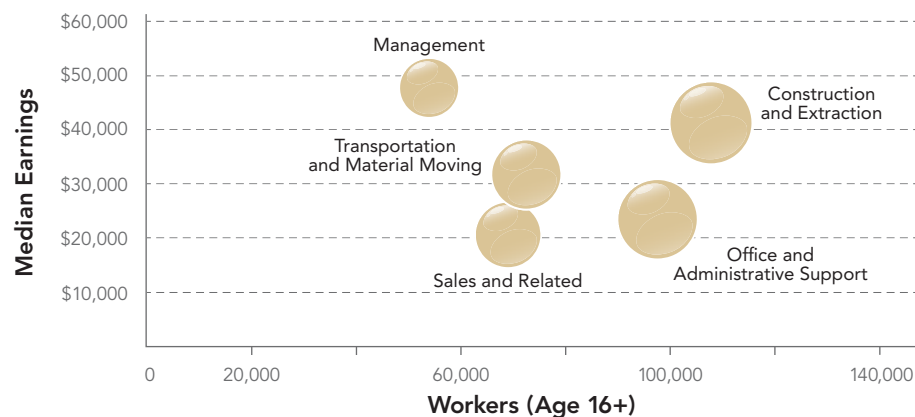
AVERAGE HOUSEHOLD BUDGET INDEX

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.



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, LLC, is a national retail analytics and locational intelligence firm that specializes in all aspects of retail market analyses and recruitment, from “macro to micro” trade area assessment to actively recruiting retailers on behalf of our clients.

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.



C. Kelly Cofer
President & CEO
The Retail Coach, LLC

Retail360®

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” data gathered through extensive visits within 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 helps assure our clients that they are receiving the latest and best information for their retail recruitment efforts—all with personal service and coaching guidance that continues beyond the initial project scope and timeline.

Our Retail360® 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 –

“It’s not about data. It’s about your success.”



ACKNOWLEDGEMENTS

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 2018, ESRI 2018, U.S. Census Bureau, Economy.com, 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 MapInfo, Nielsen, ESRI and/or Microsoft Corporation.

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