



Retail Market Research & Strategic Plan Overview



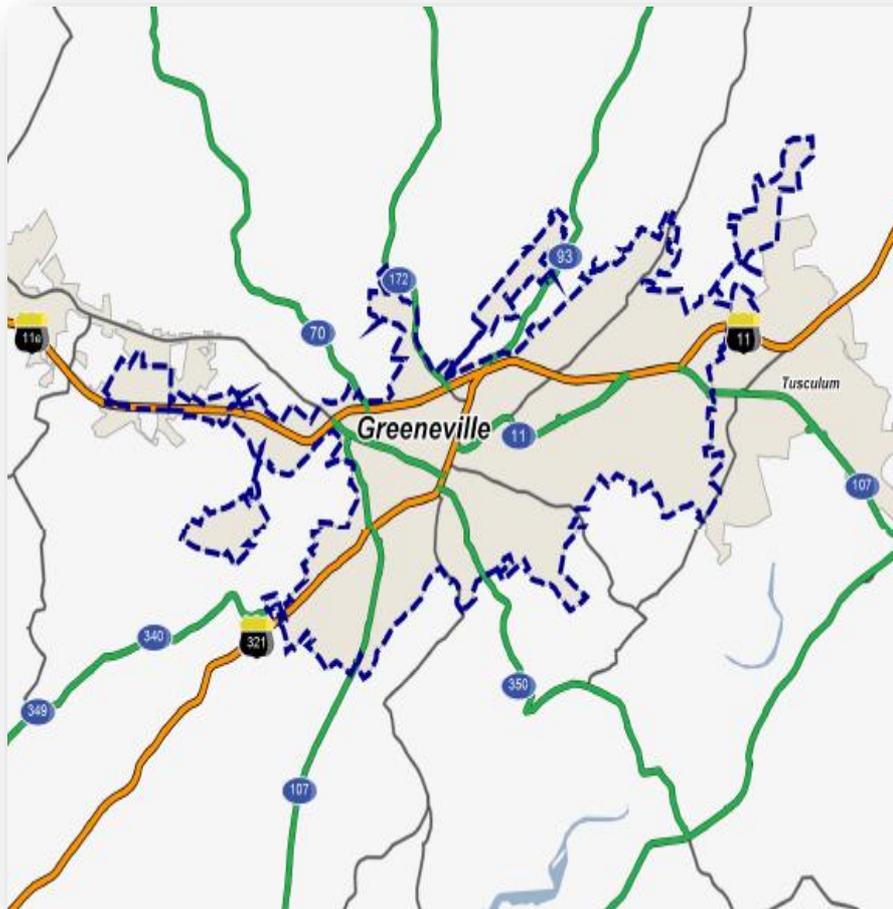


our research

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our research

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DEMOGRAPHIC REPORTS

- Detailed Demographics
- Age by Gender
- Age by Income
- Household Wealth
- Income and Disposable Income
- Consumer Behaviors
- Consumer Attitudes

TAPESTRY SEGMENTATION ANALYSIS

PEER ANALYSIS

RETAIL SPENDING REPORTS

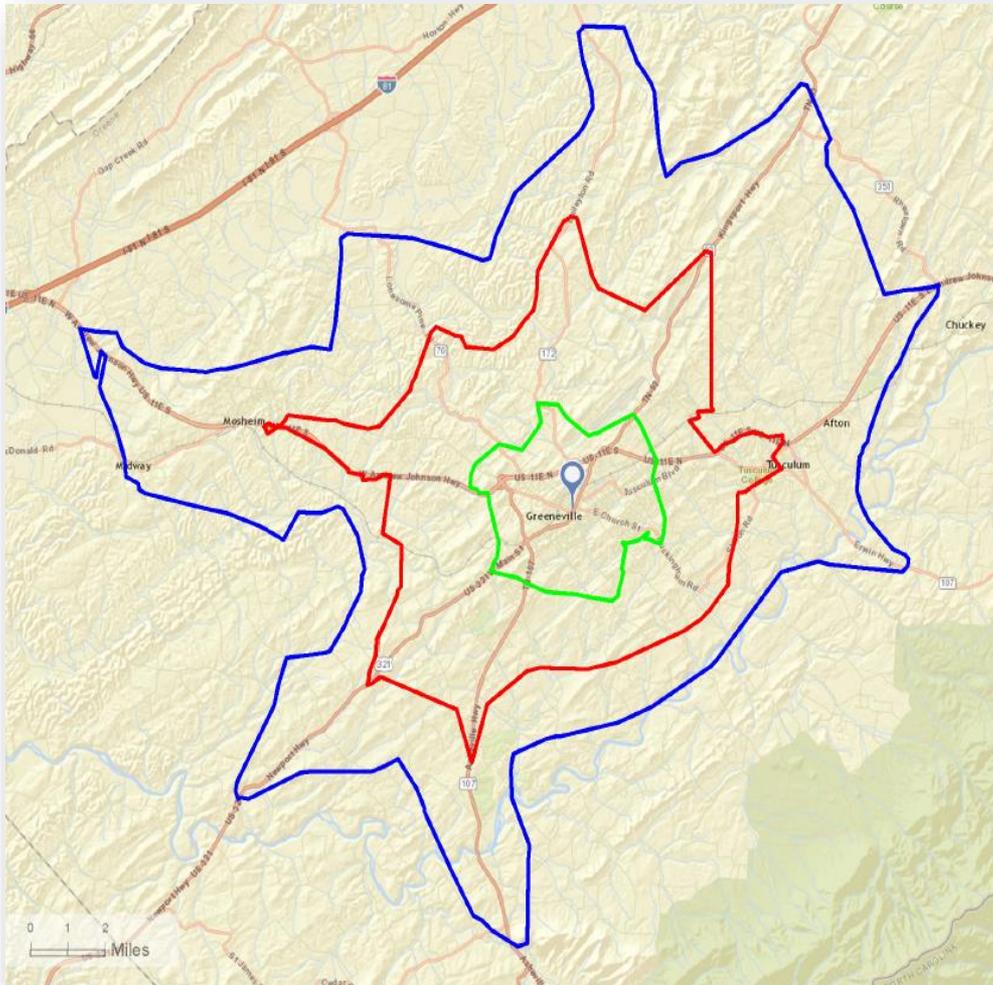
- Consumer Expenditures
- Consumer Attitudes

RETAIL GAP ANALYSIS

RETAIL VOID ANALYSIS

market analysis

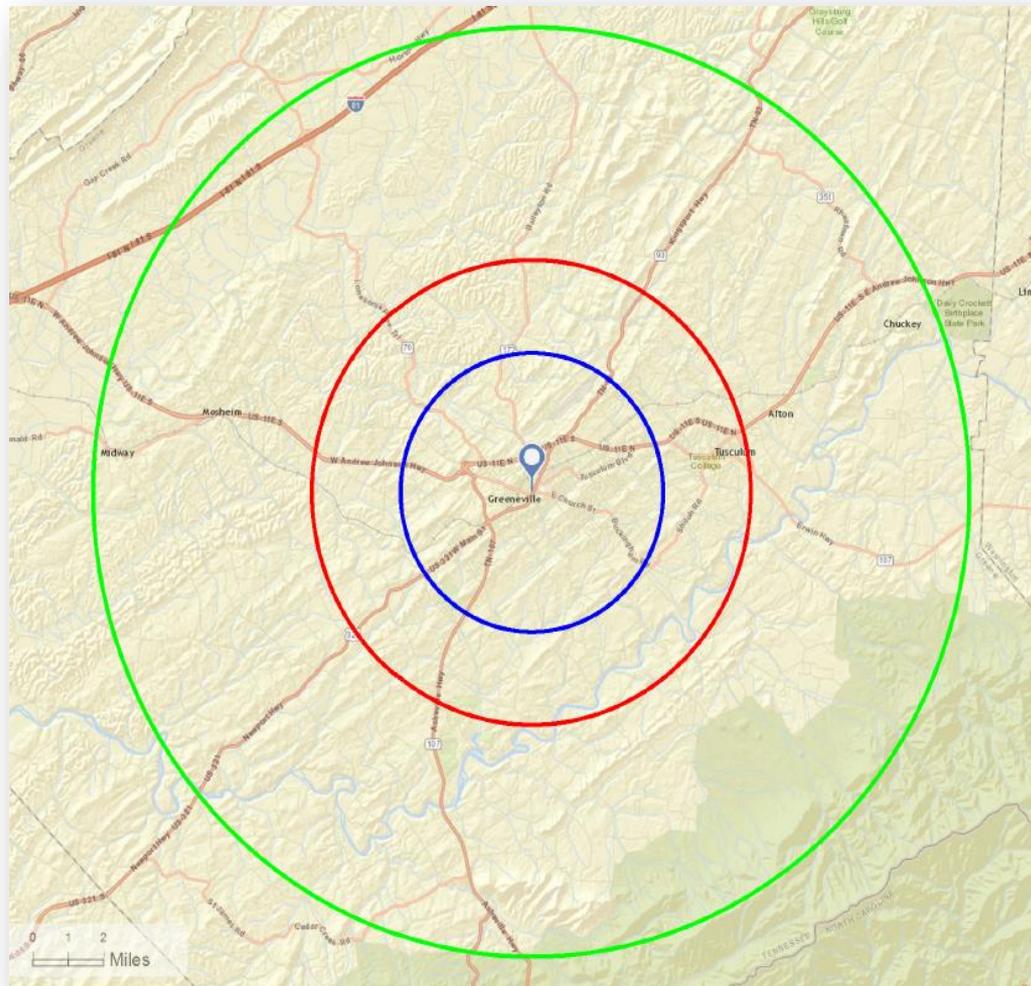
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Category	5 Minute	10 Minute	15 Minute
Population 2014	10,789	25,291	38,878
Population 2019	10,812	25,228	38,931
Median Household Income 2014	\$26,864	\$30,596	\$33,168
Median Household Income 2019	\$31,829	\$35,476	\$37,647
Median Disposable Income 2014	\$24,035	\$27,035	\$28,766

market analysis

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Category	3 Mile Radius	5 Mile Radius	10 Mile Radius
Population 2014	18,055	28,189	53,614
Population 2019	18,043	28,146	53,727
Median Household Income 2014	\$29,751	\$31,507	\$33,980
Median Household Income 2019	\$35,014	\$36,315	\$37,988
Median Disposable Income 2014	\$26,423	\$27,683	\$29,136



demographic highlights

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tapestry segmentation

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Segmentation 101

Segmentation systems operate on the theory that people with similar tastes, lifestyles, and behaviors seek others with the same tastes—“like seeks like.” These behaviors can be measured, predicted, and targeted. Esri’s Tapestry Segmentation system 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.

What is Tapestry Segmentation?

Tapestry Segmentation represents the fourth generation of market segmentation systems that began more than 30 years ago. The 65-segment Tapestry Segmentation system classifies US neighborhoods based on their socioeconomic and demographic compositions. The power of Tapestry Segmentation allows you to profile consumers and constituents.

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.

demographic highlights

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LifeMode Group: GenXurban

Midlife Constants



TAPESTRY
SEGMENTATION
esri.com/tapestry

WHO ARE WE?

Midlife Constants residents are seniors, at or approaching retirement, with below average labor force participation and above average net worth. Although located in predominantly metropolitan areas, they live outside the central cities, in smaller communities. Their lifestyle is more country than urban. They are generous, but not spendthrifts.

22.3%

of Households within a 5 Mile Radius of Greeneville

35.2%

of Households within a 5 Minute Drive Time of Greeneville

OUR NEIGHBORHOOD

- Older homes (most built before 1980) found in the suburban periphery of smaller metropolitan markets.
- Primarily married couples, with a growing share of singles.
- Settled neighborhoods with slow rates of change and residents that have lived in the same house for years.
Single-family homes, less than half still mortgaged, with a median home value of \$41,000 (Index 80).



SOCIOECONOMIC TRAITS

- Education: 64% have a high school diploma or some college.
- Unemployment is lower in this market at 7.4% (Index 86), but so is the labor force participation rate (Index 89).
- Almost 42% of households are receiving Social Security (Index 150); 28% also receive retirement income (Index 160).
- Traditional, not trendy; opt for convenience and comfort, not cutting-edge. Technology has its uses, but the bells and whistles are a bother.
- Attentive to price, but not at the expense of quality, they prefer to buy American and natural products.
- Radio and newspapers are the media of choice (after television).

Note: The Index represents the ratio of the segment rate to the US rate multiplied by 100. Consumer preferences are estimated from data by GfK MRI.

demographic highlights

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LifeMode Group: GenXurban

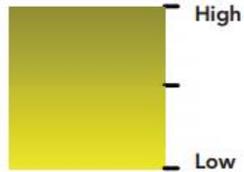
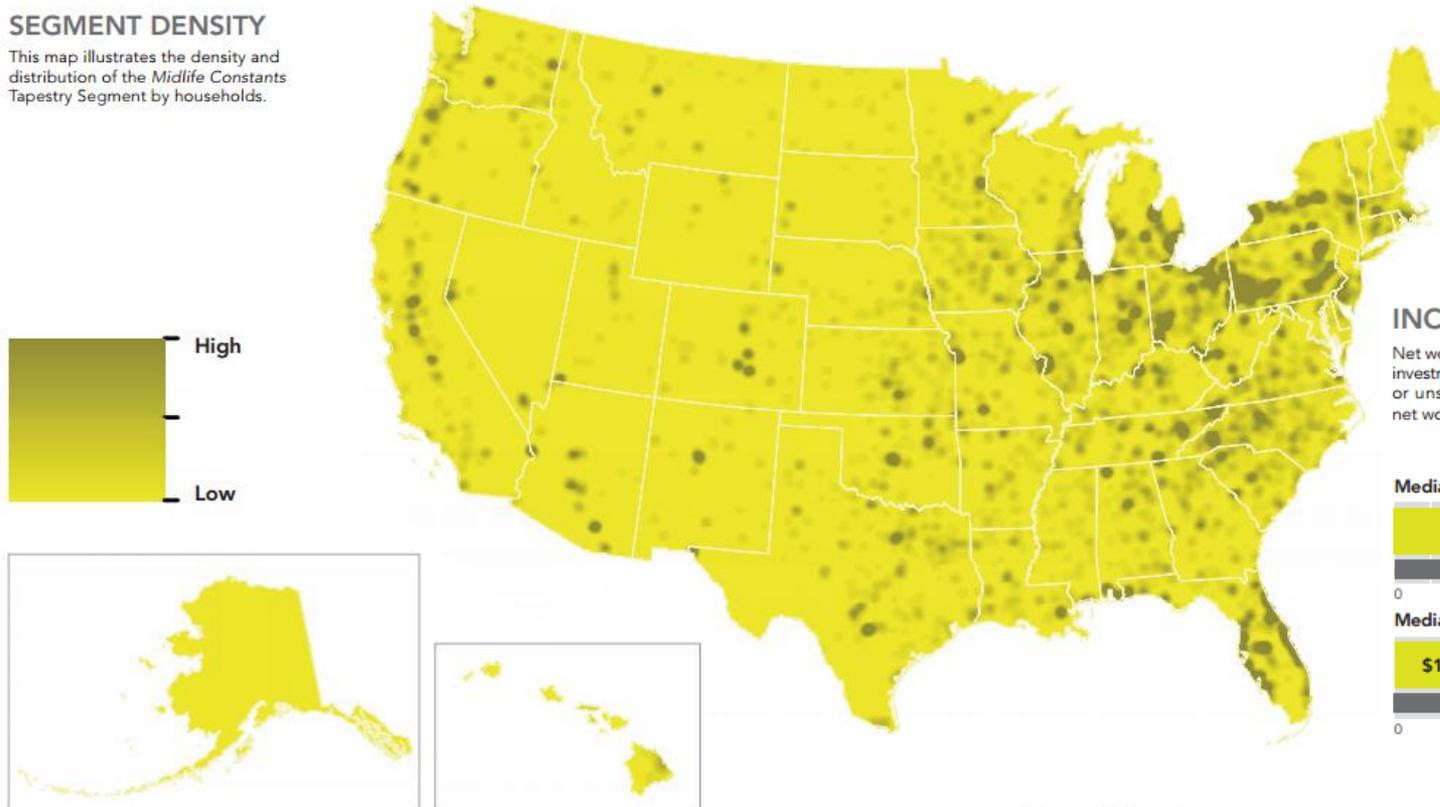
Midlife Constants



TAPESTRY
SEGMENTATION
esri.com/tapestry

SEGMENT DENSITY

This map illustrates the density and distribution of the *Midlife Constants* Tapestry Segment by households.



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



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For more information
1-800-447-9778
info@esri.com
esri.com



demographic highlights

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10B

LifeMode Group: Rustic Outposts

Rooted Rural



WHO ARE WE?

Rooted Rural is heavily concentrated in the Appalachian mountain range as well as in Texas and Arkansas. Employment in the forestry industry is common, and *Rooted Rural* residents live in many of the heavily forested regions of the country. Nearly 9 of 10 residents are non-Hispanic whites. This group enjoys time spent outdoors, hunting, fishing, or working in their gardens. Indoors, they enjoy watching television with a spouse and spending time with their pets. When shopping, they look for American-made and generic products. These communities are heavily influenced by religious faith, traditional gender roles, and family history.

35.2%

**of Households within a
10 Mile Radius of Greeneville**

29.1%

**of Households within a
15 Minute Drive Time of Greeneville**

OUR NEIGHBORHOOD

- This market is dominated by married couples, few with children at home.
- 80% of homes are owner occupied: primarily single family (73%) or mobile homes (23%).
- Nearly one in five housing units are vacant, with a high proportion for seasonal use.
- Home values are very low—almost half of owned homes are valued under \$100,000.



SOCIOECONOMIC TRAITS

- Thrifty shoppers that use coupons frequently and buy generic goods.
- Far-right political values on religion and marriage.
- Do-it-yourself mentality; grow their own produce and work on their cars and ATVs.
- Pay bills in person and avoid using the Internet for financial transactions.
- Often find computers and cell phones too complicated and confusing.
- Clothes a necessity, not a fashion statement; only buy new clothes when old clothes wear out.

Note: The Index represents the ratio of the segment rate to the US rate multiplied by 100. Consumer preferences are estimated from data by GfK MRI.

demographic highlights

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10B

LifeMode Group: Rustic Outposts

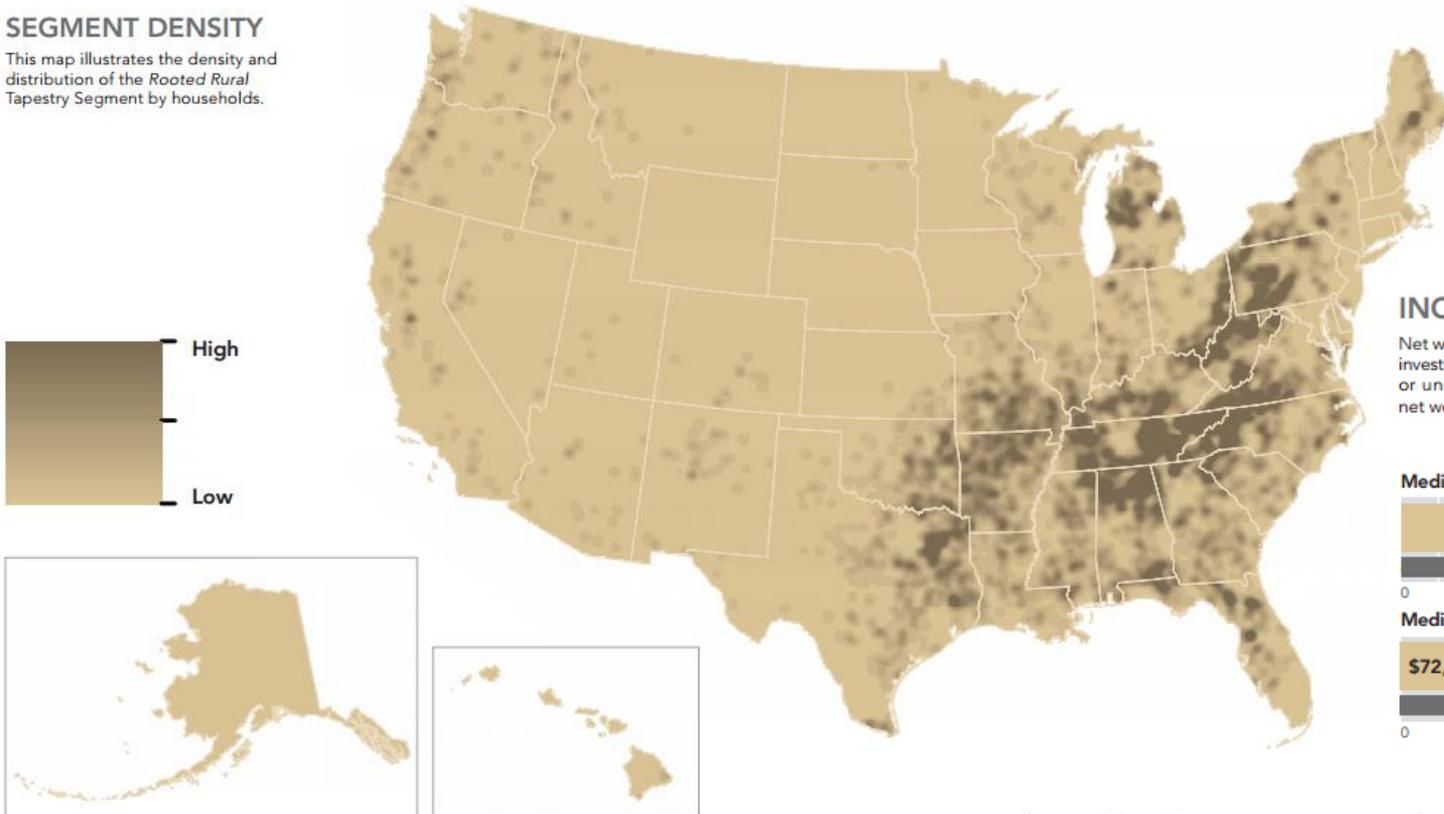
Rooted Rural



TAPESTRY
SEGMENTATION
esri.com/tapestry

SEGMENT DENSITY

This map illustrates the density and distribution of the *Rooted Rural* Tapestry Segment by households.



INCOME AND NET WORTH

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Median Household Income



Median Net Worth





peer analysis

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peer analysis

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City	State	Population (2010)	Population (2014)	Population (2019)	Households (2014)	Average Household Income (2014)	Total Retail Expenditures (2014)
Seagoville	TX	15,022	15,982	17,045	4,484	\$48,814	\$82,225,933
Dickson	TN	15,364	15,531	16,016	6,382	\$49,346	\$118,216,722
Sevierville	TN	14,807	15,360	15,925	6,274	\$49,039	\$116,180,865
Greeneville	TN	15,062	15,244	15,594	6,537	\$48,307	\$119,443,345
Fort Leonard Wood	MO	15,061	15,197	15,378	1,712	\$48,125	\$30,999,047
Warrington	FL	14,531	15,061	15,855	6,552	\$48,765	\$119,745,138
Gibsonton	FL	14,234	14,814	15,525	5,041	\$48,757	\$92,190,816
Dentsville	SC	14,062	14,575	15,182	6,496	\$50,499	\$122,086,279
Berea	KY	13,897	14,196	14,564	5,478	\$50,370	\$102,631,919
Moss Point	MS	13,704	14,008	14,264	5,615	\$49,041	\$103,280,120

The Peer Analysis focuses on identifying cities across the Southeast United States that are similar to the City of Greeneville from an economic and demographic perspective.

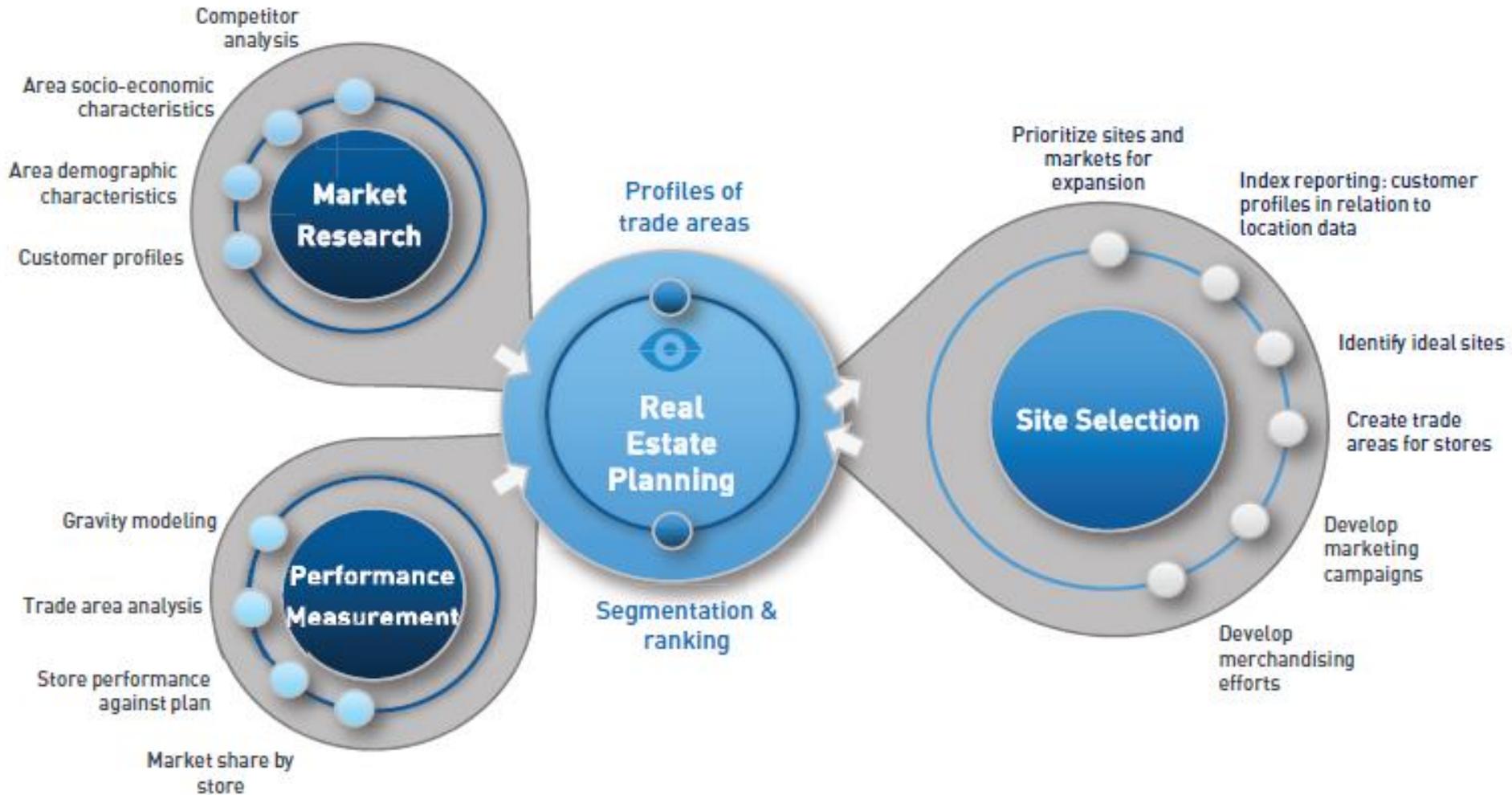


site selection process

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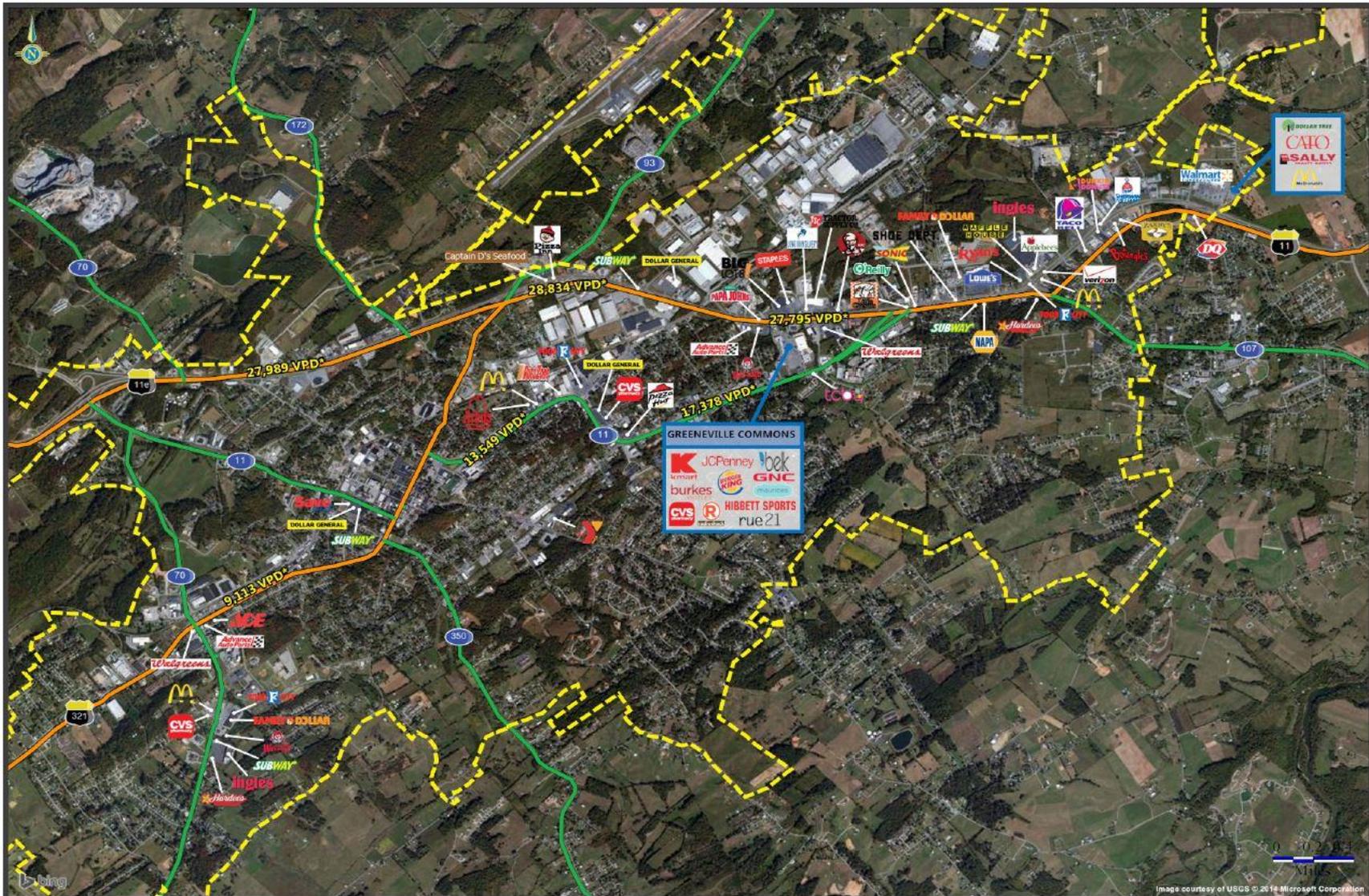
site selection process

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current retail overview

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GREENEVILLE, TENNESSEE
Major Retail & Restaurants

Retail STRATEGIES

economic drivers

| Retail Strategies

Major Area Employers

Company Name	Total Employees
Greene County School System	1158
Laughlin Memorial Hospital	796
DTR Tennessee, Inc.	775
Greene Valley Developmental Center	682
Walmart Logistics	654
Greeneville City Schools	550
Takoma Regional Hospital	542
American Greetings	505
Parker Hannifin	410
Wal-Mart Stores, Inc.	338
Worthington Industries	337
Huf North America	320
Old Castle Building Envelope	230
Jarden Zinc Products	219
TI Automotive	213
Crown Tonka Walk-Ins	206
Holston United Methodist Home	190
Donaldson Company	184
Packaging Services, Inc.	140
LMR Plastics	128
C&C Millwright Maintenance	120
MECO	114
Ceradyne 3M Company	109
Premium Waters	91



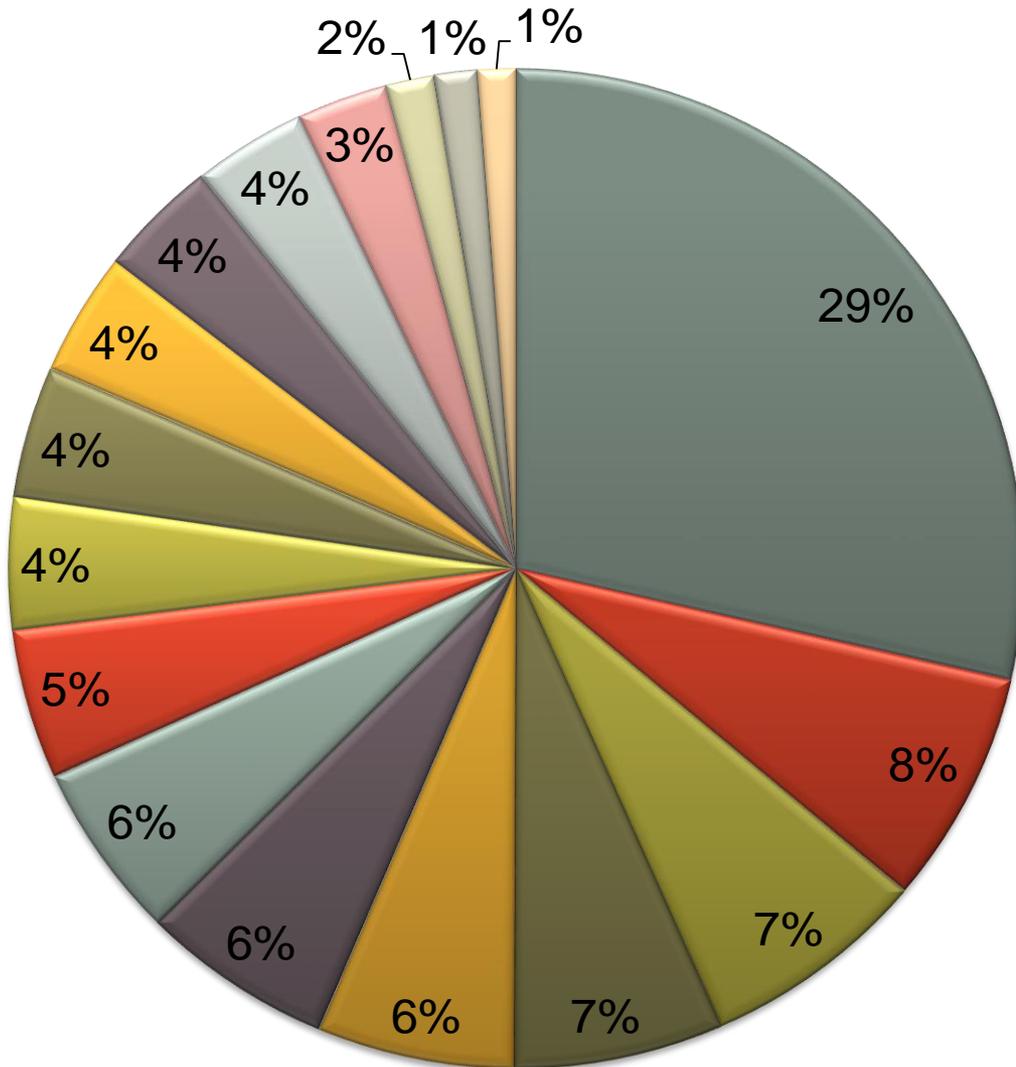


retail prospects

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gap analysis

| Retail Strategies



- Supermarkets/Grocery Stores
- Family Clothing Stores
- Limited-Service Eating Places
- Hardware Stores
- Sporting Goods Stores
- Full-Service Restaurants
- Home Furnishing Stores
- Health and Personal Care Stores
- Outdoor Power Equipment Stores
- Jewelry Stores
- Cosmetics, Beauty Supplies, Perfume Stores
- Women's Clothing Stores
- Hobby, Toys and Games Stores
- Furniture Stores
- Optical Goods Stores
- Household Appliances Stores
- Children's, Infants Clothing Stores

gap analysis

Greeneville, TN Retail GAP Summary

10 Mile Radius

Retail Stores	Opportunity GAP
Supermarkets/Grocery Stores	\$24,391,107
Family Clothing Stores	\$6,437,656
Limited-Service Eating Places	\$6,203,497
Hardware Stores	\$5,687,863
Sporting Goods Stores	\$5,371,050
Full-Service Restaurants	\$5,238,422
Home Furnishing Stores	\$4,873,530
Health and Personal Care Stores	\$4,132,124
Outdoor Power Equipment Stores	\$3,639,427
Jewelry Stores	\$3,605,222
Cosmetics, Beauty Supplies, Perfume Stores	\$3,405,531
Women's Clothing Stores	\$3,275,069
Hobby, Toys and Games Stores	\$3,078,613
Furniture Stores	\$2,489,470
Optical Goods Stores	\$1,314,953
Household Appliances Stores	\$1,165,576
Children's, Infants Clothing Stores	\$1,034,612
Total	\$85,343,722

The Gap Analysis is a summary of the primary spending Gaps segmented by retail category. It measures actual consumer expenditures within the City's trade area and compares it to the potential retail revenue generated by retailers in the same area. The difference between the two numbers reflects leakages, or the degree to which consumers travel outside the community for certain retail goods and services. The Gap analysis is a useful tool to gauge retail supply and demand within the community.

retail prospects

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Supermarkets/Grocery Stores

GAP: \$24,391,107



Family/Women's/Children's Clothing Stores

GAP: \$10,747,337



Limited-Service Restaurants

GAP: \$6,203,497



Hardware Stores

GAP: \$5,687,863



retail prospects

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Sporting Goods Stores

GAP: \$5,371,050



Full Service Restaurants

GAP: \$5,238,422



Home Furnishing/Furniture Stores

GAP: \$7,363,000



Health & Personal Care Stores

GAP: \$4,132,124



retail prospects

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Outdoor Power Equipment Stores

GAP: \$3,639,427



Beauty Supply Stores

GAP: \$3,405,531



Jewelry Stores

GAP: \$3,605,222



Hobby, Toys and Games

GAP: \$3,078,613



focus properties

| Retail Strategies

information
collected
during
**Boots on
the Ground**
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

focus properties

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	Number on Aerial	Name	Address	City	State	Zip
Zone A	1	Former Food Lion - Fairgrounds Plaza	2325 East Andrew Johnson Hwy	Greeneville	TN	37745
	2	Car Wash	2510 East Andrew Johnson Hwy	Greeneville	TN	37745
	3	Crockett Crossing	2771 East Andrew Johnson Highway	Greeneville	TN	37745
	4	Property Across from Waffle House	2761 East Andrew Johnson Highway	Greeneville	TN	37745
	5	Land on E Andrew Johnson	3190 East Andrew Johnson Highway	Greeneville	TN	37745
	6	Land by Knights Inn	121 Serral Drive	Greeneville	TN	37745
	7	Town Square Shopping Center	3805 East Andrew Johnson Highway	Greeneville	TN	37745
	8	The Shoppes at Towne Crossing	3805 East Andrew Johnson Highway	Greeneville	TN	37745
	9	Walmart Outparcel	3626 E Andrew Johnson	Greeneville	TN	37745
	10	Morgan Pointe	3805 East Andrew Johnson Highway	Greeneville	TN	37745
	11	Andrew Johnson Hwy Land	3805 East Andrew Johnson Highway	Greeneville	TN	37745
Zone B	1	Greeneville Square	835 East Andrew Johnson Highway	Greeneville	TN	37745
	2	Greenevillage Shopping Center	104 Village Drive #3,	Greeneville	TN	37745
	3	Popcorn Video	1260 East Andrew Johnson Highway	Greeneville	TN	37745
	4	Tusculum View Centre	1410 East Andrew Johnson Highway	Greeneville	TN	37745
	5	BigLots! Staples Center	1475 East Andrew Johnson Highway	Greeneville	TN	37745
	6	Greeneville Commons	1353 Tusculum Boulevard	Greeneville	TN	37745
	7	Vacant Gas Station	1402 Tusculum Blvd	Greeneville	TN	37745
	8	SavMorFoods Center	1665 East Andrew Johnson Highway	Greeneville	TN	37745
	9	Former Single Tenant Space	4130 Tusclum	Greeneville	TN	37745
Zone C	N/A					
Zone D	N/A					
Zone E	1	West Greene Shopping Center	509 Asheville Highway	Greeneville	TN	37745
	2	Land at Food City	509 Asheville Highway	Greeneville	TN	37745
	3	Greenville West Shopping Center	621 Asheville Hwy	Greeneville	TN	37745
Other	1	Dollar General	130 W. Bernard Ave	Greeneville	TN	37745
	2	Vacant Don Smith Dealership (Gateway Ford)	1055 West Andrew Johnson Highway	Greeneville	TN	37745

Alderman
Sarah Webster

Mayor
W.T. Daniels

Alderman
Buddy Hawk

Five Golden Rings

Alderman
Darrell Bryan



Alderman
Keith Paxton

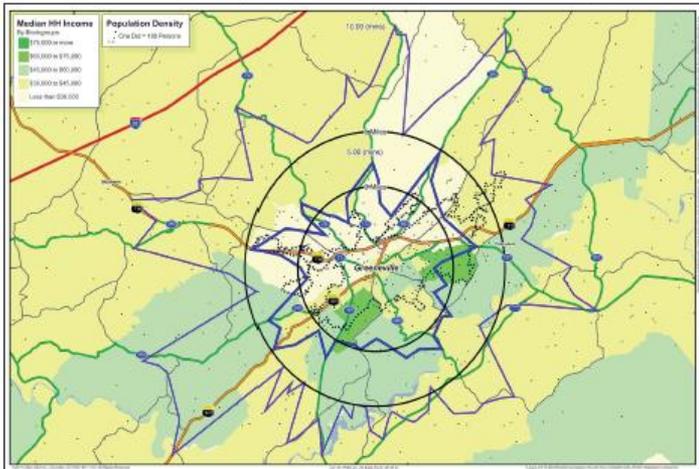
implementation

marketing guide

GREENEVILLE, TN Marketing Guide



Greenville, Tennessee - Greene County



GREENEVILLE TENNESSEE

Tom Ferguson
President/COO | Green County Partnership
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(623) 418-1247 (R)

Ashley Shelton
Economic Development Project Manager
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Greene County Partnership
115 Academy Street
Greenville, Tennessee 37743
www.growinggreenville.com

DEMOGRAPHIC PROFILE	3 Mile Radius	5 Mile Radius	5 Minute Drive Time	10 Minute Drive Time
2014 Estimated Population	18,055	28,189	10,789	25,291
Total Number of Employees	12,960	17,170	9,722	15,455
Median HH Income	\$29,751	\$31,507	\$26,864	\$30,596

Market Highlights

Quick Facts

- Residents of Greenville, Tennessee fall into the Midlife Constants Tapestry Segment (22.3%). Midlife Constants residents are seniors, or approaching retirement, with below average labor force participation and above average net worth. Although located in predominantly metropolitan areas, they live outside the central cities, in smaller communities. Their lifestyle is more country than urban. They are generous, but not spendthrifts. Primarily married couples, with a growing share of singles. Attentive to price, but not at the expense of quality, they prefer to buy American and natural products. They are DIY homebodies that spend on home improvement and gardening.
- The current Median Household Income for Greenville, Tennessee is \$31,507. The five-year projection for Median Household Income in Greenville is \$36,315. This represents an increase of 15.3%.
- Traffic Counts (TDOT):
Hwy 11a 27,989 VPD
Tusculum Blvd 17,378 VPD

Major Area Employers

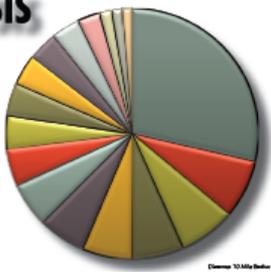
Company Name	Total Employees
Greene County School System	1150
Loughlin Memorial Hospital	796
DTR, Tennessee, Inc.	775
Greene Valley Developmental Center	692
Walmart Logistics	654
Greenville City Schools	650
Taloma Regional Hospital	642
American Greetings	605
Parker Hannifin	410
Wal-Mart Stores, Inc.	330
Washington Industries	337
Huf North America	320
Old Castle Building Envelope	230
Jordan Zinc Products	219
TI Automotive	213
Crown Torkio Walk-In	206
Holston United Methodist Home	190
Donaldson Company	184
Packaging Services, Inc.	180
LJR Plastics	128
C&C Millwright Maintenance	120
MECO	114
Candridge 3M Company	109
Premium Waters	91

Focus Properties

Property Name	Location	Property Name	Location
Walmart Outparcel	3626 E Andrew Johnson	Car Wash	2610 East Andrew Johnson Hwy
Former Food Lion - Fairgrounds Plaza	2326 East Andrew Johnson Hwy	Greenville Square	838 East Andrew Johnson Highway
Andrew Johnson Hwy Land	3781 Hwy 11 E	Greenville Shopping Center	104 Village Drive #3,
Former Single Tenon Space	4130 Tusculum	Popcorn Video	1240 East Andrew Johnson Highway
Crocket Crossing	2771 East Andrew Johnson Highway	Big Lots/ Staples Center	1476 East Andrew Johnson Highway
Property Across from Waffle House	2761 East Andrew Johnson Highway	Vacant Dan Smith Dealership	1065 West Andrew Johnson Highway
Morgan Pointe	3806 East Andrew Johnson Highway	Town Square Shopping Center	3806 East Andrew Johnson Highway
Land by Knights Inn	121 Serral Drive	The Shoppes at Towne Crossing	3806 East Andrew Johnson Highway
Greenville Commons	1383 Tusculum Boulevard	SauMarFoods Center	1646 East Andrew Johnson Highway
Tusculum View Courts	1410 East Andrew Johnson Highway	Land on E Andrew Johnson	3190 East Andrew Johnson Highway
Greenville West Shopping Center	621 Asheville Hwy	West Greene Shopping Center	609 Asheville Highway
Vacant Gas Station	1402 Tusculum Blvd	Land of Food City	609 Asheville Highway
Dollar General	130 W. Bernard Ave		

GAP ANALYSIS

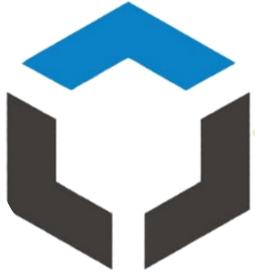
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Supermarkets/Grocery Stores	\$24,391,107	Jewelry Stores	\$3,606,222
Family Clothing Stores	\$6,437,666	Beauty Supply Stores	\$3,406,531
Limited-Service Restaurants	\$6,203,497	Women's Clothing Stores	\$3,275,069
Hardware Stores	\$6,687,863	Hobby, Toys & Games Stores	\$3,078,613
Sporting Goods Stores	\$6,371,080	Furniture Stores	\$2,489,470
Full-Service Restaurants	\$6,238,422	Optical Goods Stores	\$1,314,953
Home Furnishing Stores	\$4,873,630	Household Appliances Stores	\$1,165,576
Health & Personal Care Stores	\$4,132,124	Children's Clothing Stores	\$1,034,612
Outdoor Power Equipment Stores	\$3,639,427		

recruitment objectives

| Retail Strategies



Connections & Advocacy

- Contact Brokers – Landlord and Tenant Representation
- Contact Developers
- Contact Retail Real Estate Managers



Customized Research & Marketing

- Site and Project Specific Data Reports
- Site and Project Specific GIS Mapping



Manage Changing Retail Landscapes

- Work with New Development
- Assist with Vacant Space and Relocations

basecamp

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City of Greenville, TN Greene County - Greenville TN

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Project overview & activity

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MONDAY, 22 DECEMBER 2014

Message [Chick-fil-A](#)

Posted by **Todd S.**

TUESDAY, 25 NOVEMBER 2014

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Uploaded by **Ford F.**

THURSDAY, 13 NOVEMBER 2014

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FRIDAY, 31 OCTOBER 2014

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Lacy Beasley

Latest activity 5 days ago

Laura Marinos

Latest activity 11 days ago

Amanda Beshears

Latest activity 19 days ago

Ford Fitts

Latest activity 19 days ago

Matt Petro

Hasn't signed in recently

Scott vonCannon

Hasn't signed in recently

Mead Silsbee

Hasn't signed in recently

Chip Rodgers

Hasn't signed in recently

Joseph Fackel

Hasn't signed in recently

Rodney Barstein

Hasn't signed in recently

Laura Hudson

Hasn't signed in recently

Joe Strauss

Hasn't signed in recently

Brooks Corr





Questions?

We make retail happen.

Market **ANALYSIS** .
Strategic **PLANNING** .
Retail **RECRUITMENT** .

