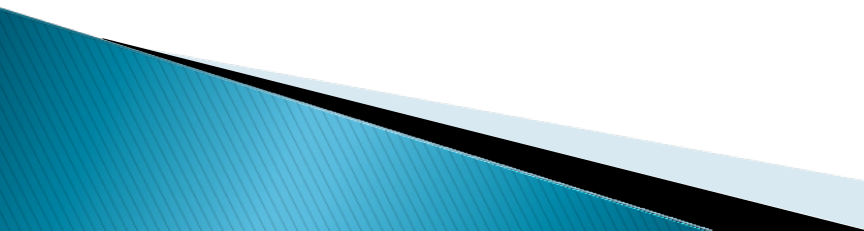


Today's Presentation: Understanding STDBonline Retail Data

- ▶ Training Resources
 - ▶ Getting Retail Reports
 - ▶ Retail Market Potential
 - ▶ Retail MarketPlace Profile
 - ▶ Question and Answer Session
-
- ▶ Learning to understand how to use STDBonline reports more effectively and efficiently.
- 

Retail Market Potential Report Overview

Retail Market Potential – a collection of data that measures the likely demand for a product or service in a given trade area.

This data is organized into a MPI (market potential index)

– MPI of 100 represents the U.S. average.

$$\text{Market Potential Index} = \frac{\text{Local Consumption Rate}}{\text{U.S. Consumption Rate}} \times 100$$



Using The Report

- ▶ An effective real estate professional may use the data in a number of ways.
 - Optimize the merchandize mix
 - Invest marketing dollars more effectively
 - Develop successful advertising and marketing plans
 - Deciding where expansions are likely to be most profitable

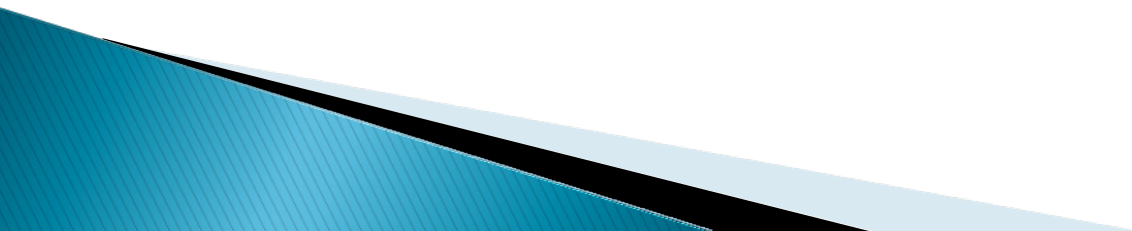
How Is The Data Segmented?

- ▶ Apparel
 - ▶ Automobiles
 - ▶ Automotive Aftermarket
 - ▶ Beverages
 - ▶ Cameras/Film
 - ▶ Computers
 - ▶ Convenience Stores
 - ▶ Entertainment
 - ▶ Financial Services
 - Food
 - Health
 - Home
 - Insurance
 - Pets
 - Reading Material
 - Telephone/Service
 - Television/Sound Equipment
 - Travel
- 

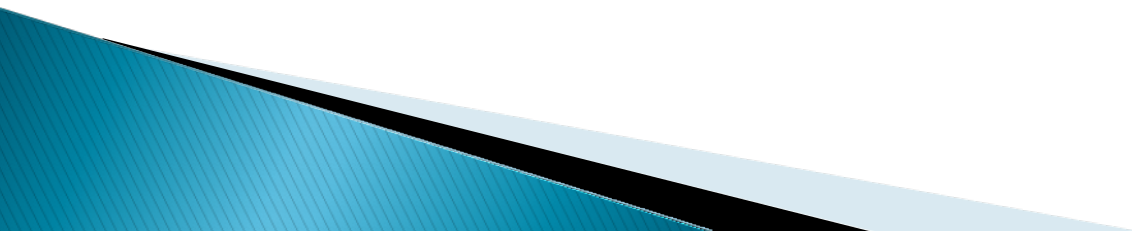
Detailed Segmentation

- ▶ Apparel  Segment
 - Bought any men's apparel
 - Bought any women's apparel
 - Bought apparel for child <13 in last 6 months
 - Bought any shoes
 - Bought any costume jewelry
 - Bought any fine jewelry
 - Bought a watch
- 
- Subgroup

Why Use Market Potential Data?

- ▶ Market Potential data helps organizations to understand, predict, and influence consumer behavior by providing insight into areas with the highest growth potential. This allows you to make informed decisions about products and services based on the latest trends and consumer demand.
- 

Where Do We Get The Data?

- ▶ Mediamark Research Incorporated provides the data.
 - ▶ They are a nationally representative survey of U.S. households. Their 25 year history and dedication to a single goal “to understand the American consumer” has led them to be the most reliable source of media and consumer research.
- 

How Is Market Potential Calculated?

- ▶ The calculation is created by combining ESRI's Tapestry segmentation data and 2009 Doublebase data from Mediamark Research.

Expected Number of Consumers $\sum_{n=1}^{65} (\text{Count}_n \times \text{Consumption Rate}_n)$

The Report



5956 Sherry Lane
5956 Sherry Ln
Dallas, TX 75225

Site Type: Radius

Retail Market Potential

Prepared by: Ben Wilson

Latitude: 32.862285
Longitude: -96.809906
Radius: 1.0 mile

Demographic Summary	2008	2013
Population	11,578	11,673
Total Number of Adults	8,597	8,721
Households	5,105	5,099
Median Household Income	\$107,456	\$111,752

Product/Consumer Behavior	Expected Number of Adults/HHs	Percent of Adults/HHs	MPI
Apparel (Adults)			
Bought any men's apparel in last 12 months	4,898	54.7%	109
Bought any women's apparel in last 12 months	3,870	45.1%	101
Bought apparel for child <13 in last 6 months	1,833	21.3%	80
Bought any shoes in last 12 months	4,704	54.8%	107
Bought costume jewelry in last 12 months	2,001	23.3%	113
Bought any fine jewelry in last 12 months	2,016	23.5%	102
Bought a watch in last 12 months	1,724	20.1%	87

The Report

This is what a typical page of the Retail Market Potential Report looks like.



6868 Sherry Lane
6868 Sherry Ln
Dallas, TX 75226

Site Type: Radius

Retail Market Potential

Prepared by: Ben Wilson

Latitude: 32.882286
Longitude: -98.808808
Radius: 1.0 mile

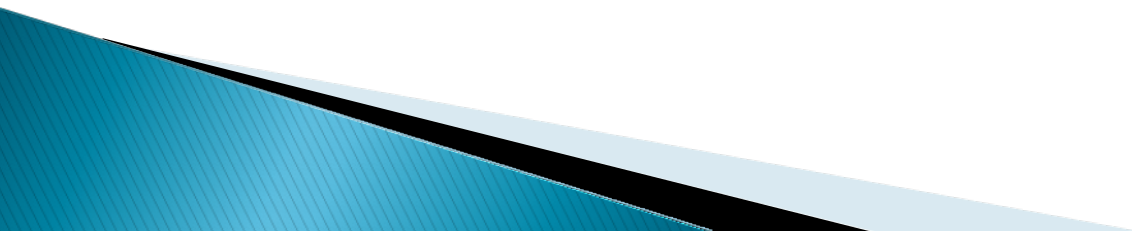
Demographic Summary	2008	2013
Population	11,578	11,673
Total Number of Adults	8,587	8,721
Households	5,105	5,099
Median Household Income	\$107,456	\$111,752

Product/Consumer Behavior	Exceeded Number of Adults/HH	Percent of Adults/HH	MPI
Apparel (Adults)			
Bought any men's apparel in last 12 months	4,598	54.7%	109
Bought any women's apparel in last 12 months	3,870	45.1%	101
Bought apparel for child <13 in last 6 months	1,833	21.3%	80
Bought any shoes in last 12 months	4,704	54.8%	107
Bought costume jewelry in last 12 months	2,001	23.5%	113
Bought any fine jewelry in last 12 months	2,016	23.5%	102
Bought a watch in last 12 months	1,724	20.1%	87
Automobiles (Households)			
HH owns/leases any vehicle	4,480	87.9%	100
HH bought new vehicle in last 12 months	803	11.6%	110
Automotive Aftermarket (Adults)			
Bought gasoline in last 6 months	7,734	90.1%	104
Bought/changed motor oil	3,714	43.2%	85
Had tune-up	3,254	37.9%	122
Beverages (Adults)			
Drank bottled water/seltzer in last 6 months	6,299	73.4%	119
Drank regular cola in last 6 months	3,757	43.8%	82
Drank beer/ale in last 6 months	4,332	50.4%	119
Cameras & Film (Adults)			
Bought any camera in last 12 months	1,501	17.5%	98
Bought film in last 12 months	2,479	28.9%	106
Bought digital camera in last 12 months	962	11.2%	144
Bought memory card for camera in last 12 months	748	8.7%	126
Computers (Households)			
HH owns a personal computer	4,324	84.7%	121
HH spent <\$500 on home PC	392	7.7%	84
HH spent \$500-\$999 on home PC	855	16.7%	98
HH spent \$1000-\$1499 on home PC	961	18.8%	129
HH spent \$1500-\$1999 on home PC	738	14.5%	169
Spent \$2000+ on home PC	756	14.8%	165
Convenience Stores (Adults)			
Shopped at convenience store in last 6 months	4,556	53.1%	90
Bought cigarettes at convenience store in last 30 days	641	7.5%	54
Bought gas at convenience store in last 30 days	1,871	19.5%	61
Spent at convenience store in last 30 days: <\$20	936	10.9%	108
Spent at convenience store in last 30 days: \$20-\$39	995	11.6%	111
Spent at convenience store in last 30 days: \$40+	1,920	22.4%	69

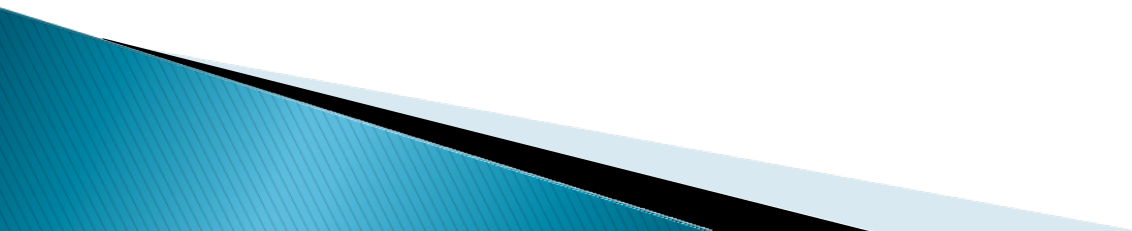
Data Note: An MPI (Market Potential Index) measures the relative likelihood of the adults/HHs in the specified trade area to exhibit certain consumer behavior or purchasing patterns compared to the U.S. average. An MPI of 100 represents the U.S. average.

Source: These data are based upon national propensities to use various products and services, applied to local demographic composition. Usage data were collected by Mediarmark Research Inc. in a nationally representative survey of U.S. households. ESRI forecasts for 2008 and 2013.

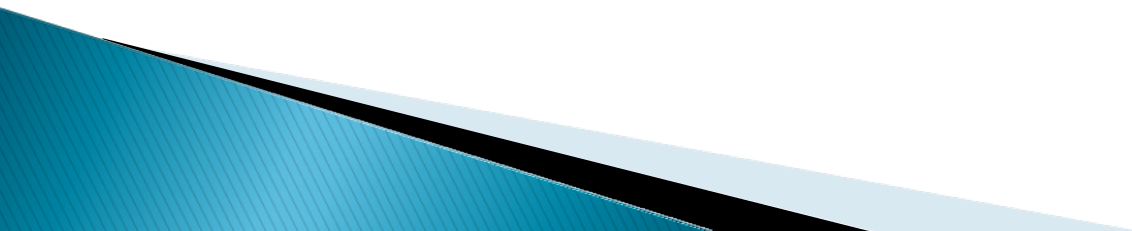
Retail MarketPlace Profile Overview

- ▶ Retail MarketPlace data – measures the retail activity for a specified trade area and provides a direct comparison between retail sales and consumer spending by industry. It also measures the gap between supply and demand.
- 

Why Use Retail MarketPlace Profile?

- ▶ Retail MarketPlace data helps you understand your market by providing information that helps determine whether a store is attracting customers or if customers are leaving the area to shop. It also provides insight into whether a store's merchandise mix meets residential customer demand by revealing changes in consumer tastes and preferences by geography.
- 

Using The Report

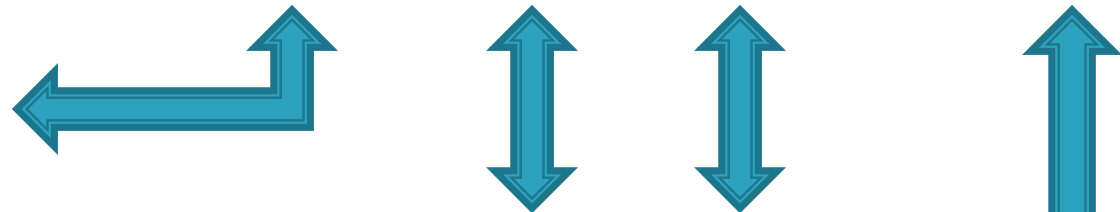
- ▶ The Retail MarketPlace Profile data can be used in a number of ways including
 - Measuring the retail sectors with the largest demand
 - Measuring local demand for goods and services
 - Analyzing the potential of future sites
 - Analyzing the Leakage/Surplus Factor in a study area
- 

Understanding Leakage/Surplus

Industry Summary

	Demand (Retail Potential)	Supply (Retail Sales)	Retail Gap	Leakage/Surplus Factor	Number of Businesses
Total Retail Trade and Food & Drink (NAICS 44-45, 722)	\$347,762,780	\$258,962,251	\$88,800,529	14.6	340
Total Retail Trade (NAICS 44-45)	\$297,747,124	\$177,245,915	\$120,501,209	25.4	259
Total Food & Drink (NAICS 722)	\$50,015,656	\$81,716,336	-\$31,700,680	-24.1	81

Estimates the expected amount spent by consumers in study area at retail establishments anywhere.



Estimates sales to consumers by establishments in the study area.

Demand (Retail Potential) - Supply (Retail Sales) = Gap

The Leakage/Surplus Factor presents a snapshot of retail opportunity. It is a measure of the relationship between supply and demand that ranges from +100 (leakage) to -100 (surplus).

How Is The Data Segmented?

- ▶ Automotive Dealers
 - ▶ Other Motor Vehicle Dealers
 - ▶ Auto Parts, Accessories, and Tire Stores
- NAICS Code 441 (Motor Vehicle & Parts Dealers)
-
- ▶ Furniture Stores
 - ▶ Home Furnishings Stores
- NAICS Code 442 (Furniture & Home Furnishings Stores)
-
- ▶ Electronics
- NAICS Code 443 (Appliances)

- ▶ Building Material and Supplies Dealers
- ▶ Lawn and Garden Equipment and Supplies Stores

NAICS Code 444
(Building Materials,
Garden Equipment &
Supply Stores)

- ▶ Grocery Stores
- ▶ Specialty Food Stores
- ▶ Beer, Wine, and Liquor Stores

NAICS Code 445 (Food
& Beverage Stores)

- ▶ Health & Personal Care Stores

NAICS Code 446
(Health Stores)

- ▶ Gasoline Stations → NAICS Code 447 (Service Stations)
 - ▶ Clothing Stores
 - ▶ Shoe Stores
 - ▶ Jewelry, Luggage, and Leather Goods Stores
- NAICS Code 448 (Clothing and Clothing Accessories Stores)
- ▶ Sporting Goods/ Hobby/Musical Instrument Stores
 - ▶ Book, Periodical, and Music Stores
- NAICS Code 451 (Sporting Goods, Hobby, Book, and Music Stores)

- ▶ Department Stores
- ▶ Other Merchandise Stores

NAICS Code 452
(General Merchandise Stores)


- ▶ Florists
- ▶ Office Supplies, Stationery, and Gift Stores
- ▶ Used Merchandise Stores
- ▶ Other Miscellaneous Store Retailers

NAICS Code 453
(Miscellaneous Store Retailers)

- ▶ Electronic Shopping and Mail-Order
- ▶ Vending Machine Operators
- ▶ Direct Selling Establishments

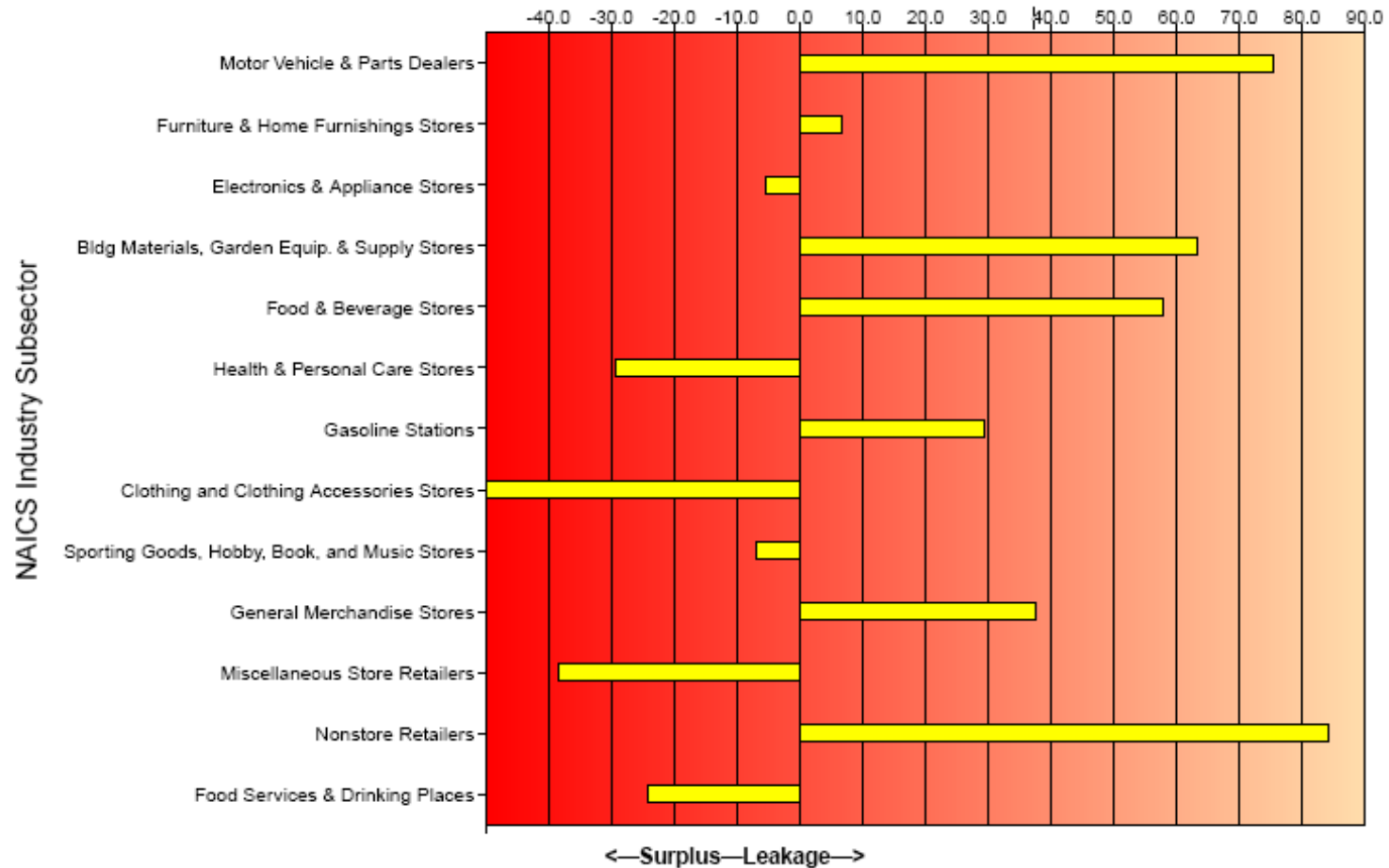
NAICS Code 454
(Nonstore Retailers)

- ▶ Full-Service Restaurants
- ▶ Limited-Service Eating Places
- ▶ Special Food Services
- ▶ Drinking Places – Alcoholic Beverages



NAICS Code 722 (Food Services & Drinking Places)

Leakage/Surplus Factor



The Report



Retail MarketPlace Profile

Prepared by: Ben Wilson

Office Location
5956 Sherry Ln
Dallas, TX 75225

Latitude: 32.862285
Longitude: -96.809906
Radius: 1.0 mile

Site Type: Radius

Summary Demographics

2008 Population	11,578
2008 Households	5,105
2008 Median Disposable Income	\$85,590
2008 Per Capita Income	\$80,197

Industry Summary

	Demand (Retail Potential)	Supply (Retail Sales)	Retail Gap	Leakage/Surplus Factor	Number of Businesses
Total Retail Trade and Food & Drink (NAICS 44-45, 722)	\$347,762,780	\$268,962,251	\$88,800,529	14.6	340
Total Retail Trade (NAICS 44-45)	\$297,747,124	\$177,245,915	\$120,501,209	26.4	259
Total Food & Drink (NAICS 722)	\$50,015,656	\$81,716,336	-\$31,700,680	-24.1	81

Industry Group

	Demand (Retail Potential)	Supply (Retail Sales)	Retail Gap	Leakage/Surplus Factor	Number of Businesses
Motor Vehicle & Parts Dealers (NAICS 441)	\$75,029,808	\$10,527,807	\$64,501,999	75.4	2
Automobile Dealers (NAICS 4411)	\$64,032,399	\$10,271,304	\$53,761,095	72.4	1
Other Motor Vehicle Dealers (NAICS 4412)	\$6,975,971	\$233,822	\$5,742,149	92.5	1
Auto Parts, Accessories, and Tire Stores (NAICS 4413)	\$5,021,236	\$22,451	\$4,998,785	99.1	0

Furniture & Home Furnishings Stores (NAICS 442)	\$14,867,334	\$13,054,918	\$1,832,418	6.8	24
Furniture Stores (NAICS 4421)	\$7,964,067	\$6,924,791	-\$940,274	-6.8	12
Home Furnishings Stores (NAICS 4422)	\$6,903,267	\$4,130,125	\$2,773,142	25.1	12

Electronics & Appliance Stores (NAICS 443/NAICS 4431)	\$12,136,280	\$13,523,704	-\$1,387,424	-5.4	28
---	--------------	--------------	--------------	------	----

Bldg Materials, Garden Equip. & Supply Stores (NAICS 444)	\$13,591,819	\$3,066,774	\$10,525,045	63.2	11
Building Material and Supplies Dealers (NAICS 4441)	\$12,801,227	\$1,561,342	\$11,239,885	78.3	6
Lawn and Garden Equipment and Supplies Stores (NAICS 4442)	\$790,592	\$1,505,432	-\$714,840	-31.1	5

Food & Beverage Stores (NAICS 445)	\$57,803,501	\$15,371,657	\$42,431,844	58.0	13
Grocery Stores (NAICS 4451)	\$53,991,134	\$9,733,376	\$44,257,758	69.5	3
Specialty Food Stores (NAICS 4452)	\$1,068,532	\$1,268,573	-\$200,041	-6.8	5
Beer, Wine, and Liquor Stores (NAICS 4453)	\$2,743,835	\$4,369,708	-\$1,625,873	-22.9	5

Health & Personal Care Stores (NAICS 446/NAICS 4461)	\$7,937,565	\$14,544,863	-\$6,607,298	-29.4	20
--	-------------	--------------	--------------	-------	----

Gasoline Stations (NAICS 447/4471)	\$38,236,457	\$20,869,267	\$17,367,190	29.4	4
------------------------------------	--------------	--------------	--------------	------	---

Clothing and Clothing Accessories Stores (NAICS 448)	\$18,153,211	\$54,278,018	-\$36,124,807	-49.9	84
Clothing Stores (NAICS 4481)	\$14,797,981	\$37,095,082	-\$22,297,101	-43.0	53
Shoe Stores (NAICS 4482)	\$1,773,914	\$7,082,760	-\$5,298,846	-59.9	7
Jewelry, Luggage, and Leather Goods Stores (NAICS 4483)	\$1,581,316	\$10,120,176	-\$8,538,860	-73.0	24

Sporting Goods, Hobby, Book, and Music Stores (NAICS 451)	\$4,441,311	\$5,092,550	-\$651,239	-6.8	17
Sporting Goods/Hobby/Musical Instrument Stores (NAICS 4511)	\$2,335,352	\$4,264,368	-\$1,929,036	-29.2	14
Book, Periodical, and Music Stores (NAICS 4512)	\$2,105,959	\$828,182	\$1,277,797	43.5	3

Data Note: Supply (retail sales) estimates sales to consumers by establishments. Sales to businesses are excluded. Demand (retail potential) estimates the expected amount spent by consumers at retail establishments. Supply and demand estimates are in current dollars. The Leakage/Surplus Factor presents a snapshot of retail opportunity. This is a measure of the relationship between supply and demand that ranges from +100 (total leakage) to -100 (total surplus). A positive value represents 'leakage' or retail opportunity outside the trade area. A negative value represents a surplus of retail sales, a market where customers are drawn in from outside the trade area. The Retail Gap represents the difference between Retail Potential and Retail Sales. ESRI uses the North American Industry Classification System (NAICS) to classify businesses by their primary type of economic activity. Retail establishments are classified into 27 industry groups in the Retail Trade sector, as well as four industry groups within the Food Services & Drinking Establishments subsector.

Source: ESRI and InfoUSA®



Retail MarketPlace Profile

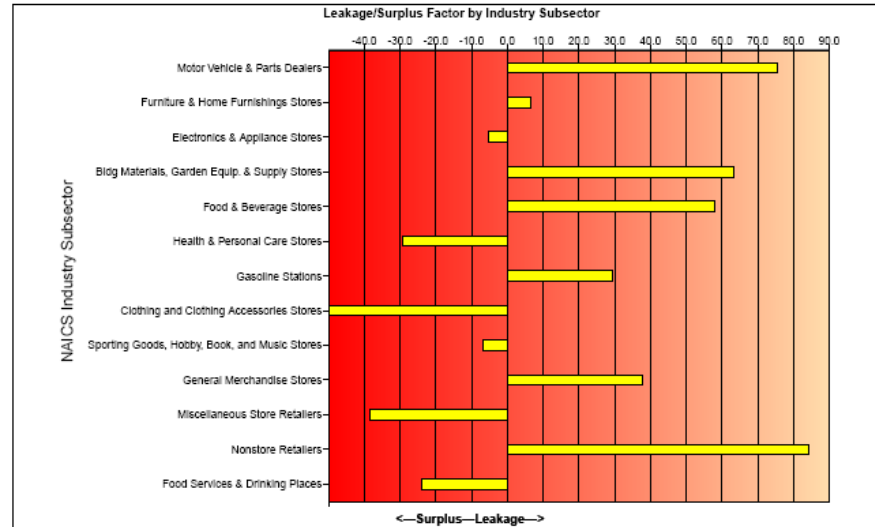
Prepared by: Ben Wilson

Office Location
5956 Sherry Ln
Dallas, TX 75225

Latitude: 32.862285
Longitude: -96.809906
Radius: 1.0 mile

Site Type: Radius

Industry Group	Demand (Retail Potential)	Supply (Retail Sales)	Retail Gap	Leakage/Surplus Factor	Number of Businesses
General Merchandise Stores (NAICS 452)	\$34,043,097	\$15,407,888	\$18,635,109	37.7	5
Department Stores Excluding Leased Depts.(NAICS 4521)	\$14,899,148	\$5,716,513	\$9,182,635	44.5	2
Other General Merchandise Stores (NAICS 4529)	\$19,143,949	\$9,691,475	\$9,452,474	32.8	3
Miscellaneous Store Retailers (NAICS 453)	\$4,469,282	\$10,051,704	-\$5,582,422	-38.4	48
Florists (NAICS 4531)	\$672,438	\$2,089,219	-\$1,416,781	-51.3	5
Office Supplies, Stationery, and Gift Stores (NAICS 4532)	\$1,551,228	\$5,034,101	-\$3,482,873	-52.9	19
Used Merchandise Stores (NAICS 4533)	\$446,258	\$966,748	-\$560,490	-38.1	11
Other Miscellaneous Store Retailers (NAICS 4539)	\$1,799,358	\$1,931,636	-\$132,278	-3.5	13
Nonstore Retailers (NAICS 454)	\$17,017,861	\$1,456,867	\$15,560,994	84.2	3
Electronic Shopping and Mail-Order Houses (NAICS 4541)	\$12,014,604	\$579,835	\$11,434,769	90.8	1
Vending Machine Operators (NAICS 4542)	\$2,046,348	\$191,777	\$1,854,571	82.9	1
Direct Selling Establishments (NAICS 4543)	\$2,958,709	\$685,255	\$2,273,454	62.4	1
Food Services & Drinking Places (NAICS 722)	\$50,015,656	\$81,716,336	-\$31,700,680	-24.1	81
Full-Service Restaurants (NAICS 7221)	\$17,314,604	\$48,618,970	-\$31,304,366	-47.5	54
Limited-Service Eating Places (NAICS 7222)	\$24,186,963	\$27,409,056	-\$3,222,093	-6.2	21
Special Food Services (NAICS 7223)	\$6,771,604	\$5,058,421	\$1,713,483	14.5	5
Drinking Places - Alcoholic Beverages (NAICS 7224)	\$1,742,185	\$629,889	\$1,112,296	46.9	1



Source: ESRI and InfoUSA®

Understanding the Report

- ▶ Just because a certain site location has a leakage or surplus in a certain retail segment does not necessarily mean that a new store should or should not be implemented.

New York City, New York



Retail MarketPlace Profile

Prepared by: Ben Wilson

New York City Location
Park Ave and E 96th St
New York, NY 10128

Site Type: Radius

Latitude: 40.786598
Longitude: -73.952683
Radius: 1.0 mile

Summary Demographics

2008 Population	244,517
2008 Households	117,630
2008 Median Disposable Income	\$57,481
2008 Per Capita Income	\$65,378

Industry Summary

	Demand (Retail Potential)	Supply (Retail Sales)	Retail Gap	Leakage/Surplus Factor	Number of Businesses
Total Retail Trade and Food & Drink (NAICS 44-45, 722)	\$6,123,904,777	\$2,127,414,432	\$3,996,490,345	48.4	1,923
Total Retail Trade (NAICS 44-45)	\$5,163,093,963	\$1,678,019,780	\$3,485,074,183	50.9	1,289
Total Food & Drink (NAICS 722)	\$960,810,814	\$449,394,652	\$511,416,162	36.3	634

Industry Group	Demand (Retail Potential)	Supply (Retail Sales)	Retail Gap	Leakage/Surplus Factor	Number of Businesses
Motor Vehicle & Parts Dealers (NAICS 441)	\$1,190,168,067	\$62,115,324	\$1,128,052,743	90.1	12
Automobile Dealers (NAICS 4411)	\$1,073,845,734	\$56,066,881	\$1,017,778,853	90.1	3
Other Motor Vehicle Dealers (NAICS 4412)	\$76,846,525	\$3,562,807	\$73,283,718	91.1	4
Auto Parts, Accessories, and Tire Stores (NAICS 4413)	\$39,475,808	\$2,485,636	\$36,990,172	88.2	5

Addison, Texas



Retail MarketPlace Profile

Prepared by: Ben Wilson

Addison, Texas

Belt Line Rd & Addison Rd

Addison, TX 75001

Site Type: Radius

Latitude: 32.954161

Longitude: -96.829909

Radius: 1.0 mile

Summary Demographics

2008 Population	7,770
2008 Households	4,922
2008 Median Disposable Income	\$54,971
2008 Per Capita Income	\$55,681

Industry Summary

	Demand (Retail Potential)	Supply (Retail Sales)	Retail Gap	Leakage/Surplus Factor	Number of Businesses
Total Retail Trade and Food & Drink (NAICS 44-45, 722)	\$175,140,978	\$930,809,201	\$-755,668,223	-68.3	771
Total Retail Trade (NAICS 44-45)	\$149,315,840	\$732,313,441	\$-582,997,601	-66.1	561
Total Food & Drink (NAICS 722)	\$25,825,138	\$198,495,760	\$-172,670,622	-77.0	210

Industry Group

	Demand (Retail Potential)	Supply (Retail Sales)	Retail Gap	Leakage/Surplus Factor	Number of Businesses
Motor Vehicle & Parts Dealers (NAICS 441)	\$37,622,858	\$137,863,124	\$-100,240,266	-57.1	43
Automobile Dealers (NAICS 4411)	\$32,803,257	\$123,364,415	\$-90,561,158	-58.0	18
Other Motor Vehicle Dealers (NAICS 4412)	\$2,342,443	\$11,076,107	\$-8,733,664	-65.1	16
Auto Parts, Accessories, and Tire Stores (NAICS 4413)	\$2,477,158	\$3,422,602	\$-945,444	-16.0	9

Data Sources

Retail MarketPlace Profile

- ▶ http://www.pcensus.com/pub/documents/esri_rm_meth.pdf

Retail Market Potential

- ▶ http://www.esri.com/data/esri_data/market-potential.html

Questions or Need Help?

- ▶ Contact customer support via phone at 469-232-2615
- ▶ Monday-Friday 8AM-5PM
- ▶ Contact online at sasupport@stdbonline.com