

ECONOMIC DEVELOPMENT COMMITTEE

February 12, 2024

The Economic Development Committee of the City of Mesa met in the lower level meeting room of the Council Chambers, 57 East 1st Street, on February 12, 2024 at 9:30 a.m.

COMMITTEE PRESENT COMMITTEE ABSENT STAFF PRESENT

Scott Somers, Chairperson Alicia Goforth Julie Spilsbury None

Jaye O'Donnell Holly Moseley Kelly Whittemore

Chairperson Somers conducted a roll call.

1. Items from citizens present.

There were no items from citizens present.

2-a. Hear a presentation, discuss, and receive an update on Mesa's retail attraction strategy:

Deputy Economic Development Director Maria Laughner introduced Economic Development Project Manager Elyce Gobat; Caroline Harrelson, consultant with The Retail Coach; and displayed a PowerPoint presentation. (See Attachment 1)

Ms. Harrelson provided an overview of The Retail Coach, a national company that focuses on retail economic development mainly through retail recruitment to communities, as well as strategic planning for communities to attract retail. She mentioned the names of the members of her core project team who are also working on the Mesa project. (See Page 2 of Attachment 1)

Ms. Gobat summarized the strategy and goals to attract high quality retailers and developers for business. She indicated the scope of work for the Request for Proposal (RFP), which included hiring the consultants on November 15, 2023. (See Pages 3 and 4 of Attachment 1)

Ms. Harrelson reviewed the project timeline and the purpose of the retail analysis, which is to gain a better understanding of the retail market in Mesa and its competitor communities. She compared Mesa to competing communities to determine the type of retailers for Mesa. (See Pages 5 through 7 of Attachment 1)

Ms. Harrelson provided a map of the targeted submarkets where the retail analysis will begin and recognized the opportunity and need for retail throughout the City of Mesa (COM). (See Page 8 of Attachment 1)

Ms. Harrelson described the strategy of analyzing consumer spending in submarkets and retail areas by using mobile location data. She presented maps depicting the district boundaries and retail trade areas for the Northeast Mesa Study. She used an example of FatCats located in Northeast Mesa to illustrate a cell phone analysis heat map, which determines that while there is some crossover, most consumers are traveling within the immediate area to FatCats. (See Pages 9 through 11 of Attachment 1)

Ms. Harrelson commented that for each of the submarkets, a retail market profile was conducted to understand the demographics of consumers. She stated that the retail market profiles are important factors to convey to retailers for recruitment purposes. She discussed the demographic breakdown of different submarkets in Mesa, and stated retail recruitment is approached differently in each submarket based on their demographics. (See Pages 12 and 13 of Attachment 1)

In response to a question from Committeemember Goforth, Ms. Harrelson explained that retail recruitment involves capturing the number and demographics of shoppers but focuses on the advantages of employment or development in Mesa rather than focusing on specific submarkets.

Ms. Harrelson compared the retail demand outlook of various sectors within each submarket of Mesa. She explained a Compound Annual Growth Rate (CAGR) of over 2% in a submarket indicates a high growth rate and identifies a retail demand analysis, as well as retail gaps in each submarket. (See Pages 14 through 16 of Attachment 1)

In response to a question from Committeemember Spilsbury, Ms. Harrelson advised that the plan and competing community analysis will include information on the number of residents who shop outside of Mesa.

Ms. Harrelson reported on the retail market profile of several districts in Mesa that have high growth numbers across the board. She commented that in each of the reports there is high growth and demand for gas stations in several submarkets, recognizing that Council does not want the focus to be on recruiting gas stations. She elaborated that the data is used for the purpose of determining the type of retailer for each submarket. She advised that the Gateway/Power Road District has a higher growth rate of 5%, and the focus will be on finding nicer, elevated restaurants. (See Pages 17 through 22 of Attachment 1)

Ms. Harrelson described how Google maps is utilized to determine the retail needs for certain districts. She expressed the opinion that the Downtown area would benefit from more unique restaurants or boutique type retailers for a small-town feel. (See Page 23 of Attachment 1)

In response to multiple questions from Chairperson Somers, Ms. Harrelson replied that one strategy for recruiting retailers to Downtown Mesa is to research other unique downtown areas and approach their retailers about opportunities in Mesa.

Ms. Harrelson discussed the engagement of various developers, retailers, and stakeholders in order to strategize the recruitment process and explore Mesa's potential. She stressed the

importance of being proactive and identifying retailers who are seeking new locations in the Valley. She emphasized cultivating relationships with existing and new shopping centers and addressing some of the challenges. (See Pages 24 and 25 of Attachment 1)

Ms. Harrelson stated that the plan development and the strategic plan continue to grow daily. She mentioned the recommendations and findings are designed to serve as action items for the COM and the Office of Economic Development to grow the retail market over the next five years. She commented The Retail Coach determines which retailers are best suited for each submarket, and then actively pursues them. She shared some retailers and other brands that she would like to have in Mesa who are expected to grow in the next few years. (See Pages 26 through 28 of Attachment 1)

In response to multiple questions from Chairperson Somers, Ms. Harrelson commented that there is a lot of opportunity for Mesa. She explained that some retailers and restaurants desire second generation space due to financial costs, while some retailers or restaurants are seeking new ground for development opportunities. She indicated it depends on the level of retailer, the location of the submarket area, and the capital of the businesses.

Ms. Harrelson advised that outreach, recruitment, and marketing is ongoing throughout the remainder of their contract. She commented that discussions with retailers are already taking place at conferences, which provide the best opportunity for recruitment. (See Page 29 of Attachment 1)

Discussion ensued on competitive markets, the challenges for Mesa's shopping centers and the recruitment of retailers and developers, and The Retail Coach's strategic plan.

Andrew Cohn, City of Phoenix business owner, expressed his opinion regarding attracting high quality retail businesses to the COM. He shared his experiences within the retail industry.

Chairperson Somers thanked staff and Ms. Harrelson for the presentation.

Adjournment.

Without objection, the Economic Development Committee meeting adjourned at 10:55 a.m.

I hereby certify that the foregoing minutes are a true and correct copy of the minutes of the meeting of the Economic Development Committee of the City of Mesa, Arizona, held on the 12th day of February 2024. I further certify that the meeting was duly called and held and that a quorum was present.

HOLLY MOSELEY, CITY CLERK

Ir (Attachments – 1)

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MESA, ARIZONA

Economic Development Committee February 12, 2024 Attachment 1 Page 2 of 30

OUR TEAM

Mesa's dedicated project team brings over 50 years of retail and economic development experience to this project. Your core project team is below.

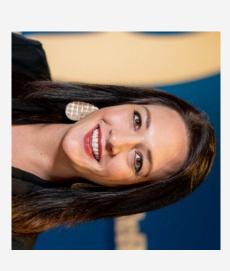


C. Kelly Cofer, CCIM
Founder & CEO



Aaron Farmer

President



Caroline Harrelson

Strategy Director



Kaleb Wilson
Project Manager

Office of Economic Deve Iopment

Elyce Gobat, Project Manager

OBJECTIVE:

 To attract and locate high quality retail/ restaurants, develop retail placemaking strategy and locations, engage developers and retailers for business attraction purposes.

PROJECT GOALS:

- · Identify quality retail opportunities specific to Mesa's retail trade areas.
- Identify what actions the City may take to support the attraction of quality retailers.
- Develop a plan for attracting retail/ restaurants, specifically addressing retail end-users, retail brokers, and retail developers



Issued 08/2023

Responses Received 10/2023

Consultant Engaged 11/15/2023

SCOPE OF WORK

RETAIL ANALYSIS TASK 1:

STAKEHOLDER ENGAGEMENT TASK 2:

- Competing Community Analysis Public Stakeholders
- Plan Development
- Identifying Retailers & Developers for Recruitment
- Marketing & Implementation

Retail Demand Analysis

Demographic Profiling

Retail Trade Area Analysis

Why? Research & Feedback

Private Stakeholders

Existing Amenity Analysis

MARKETING & ONGOING OUTREACH TASK 4:

PLAN DEVELOPMENT &

TASK 3:

RETAIL RECRUITMENT

- Site Marketing
- Retail Dashboard
- Recruitment of Retailers & Developers
- Retail Conference Representation
- Retail Recruitment Dashboard





Project Timeline

Execution of Agreement

Initial On The **Ground Visit**

Within 90 Days Completed

Tasks 1-3

From First Visit

90 Days –

Through Remainder of First Year

Kick-Off Meeting Initial On The

Review timeline, goals, and objectives with

Team Members

The Retail Coach

Project kick-off call with

key staff and stakeholders.

On-the-ground visit by

Ground Visit

project team

key areas of focus Discuss priority sites and

Tasks 1-3

Deliverables

provided

Task 4

Implementation and Recuritment Strategy

Economic Development Committee February 12, 2024 Attachment 1 Page 6 of 30

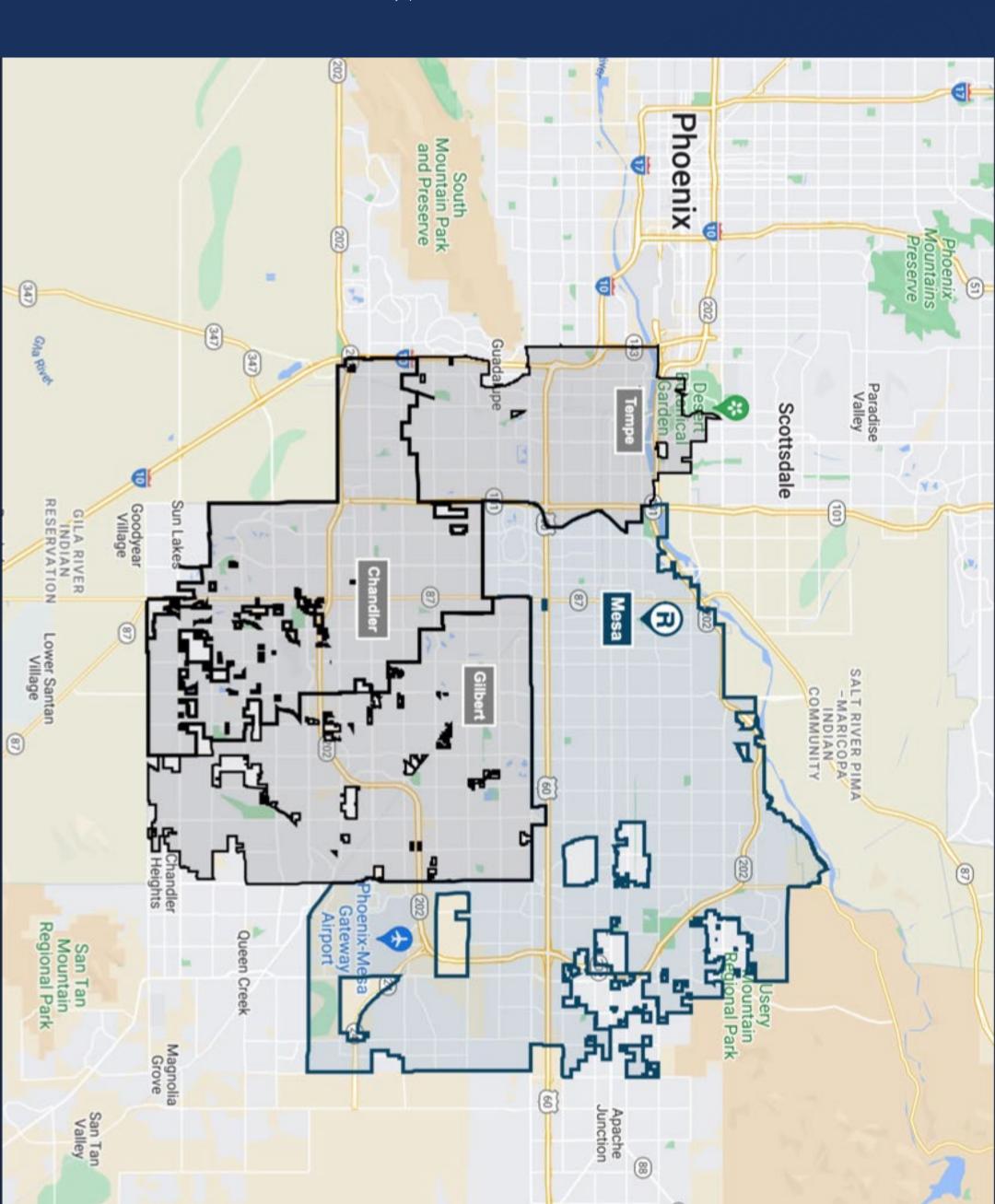
The**Retail**Coach

Task 1:

Retail Analysis

Understanding Mesa's Competing Communities

Why? When retailers look at Phoenix MSA for locations and growth, understanding the demographics of Mesa's competing communities and how those numbers drive retail matters.



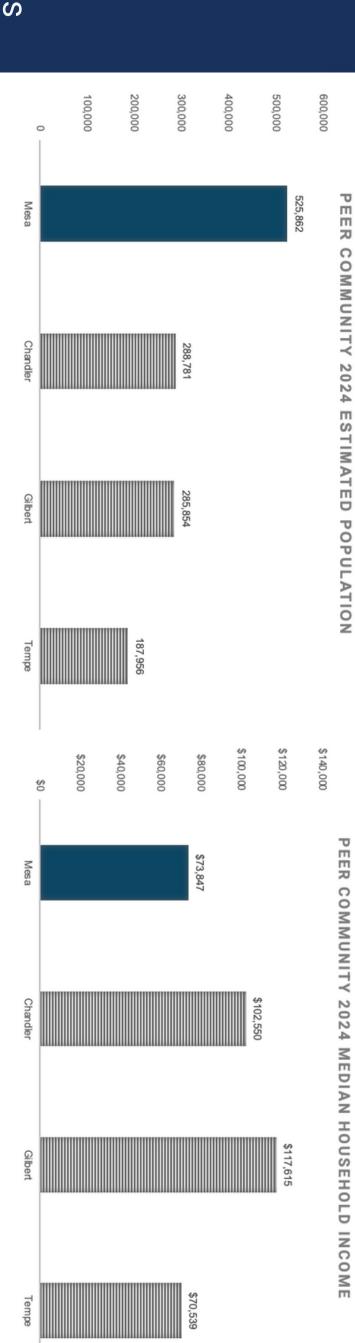
Economic Development Committee February 12, 2024 Attachment 1 Page 7 of 30

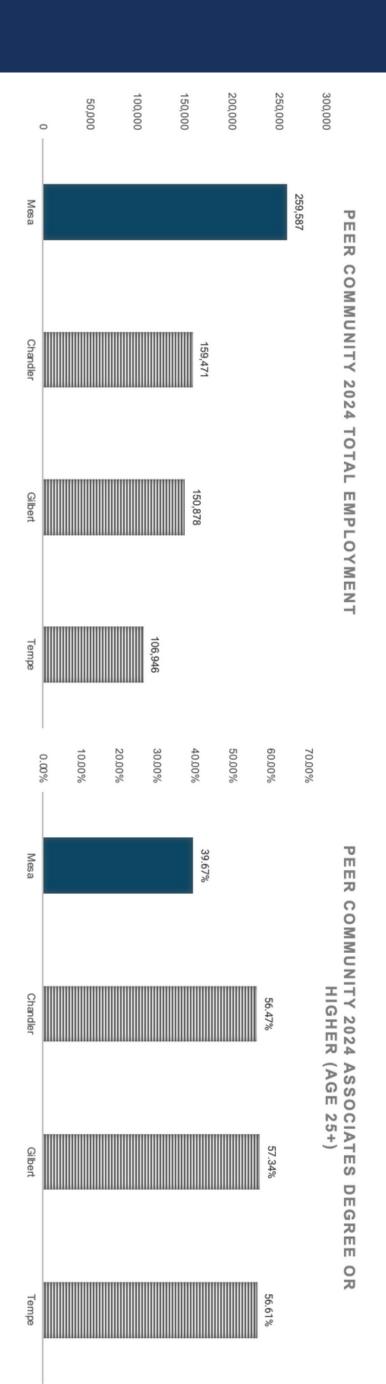
The**Retail**Coach

Task 1:

Retail Analysis

Understanding Mesa's Competing Communities





Economic Development Committee February 12, 2024 Attachment 1 Page 8 of 30

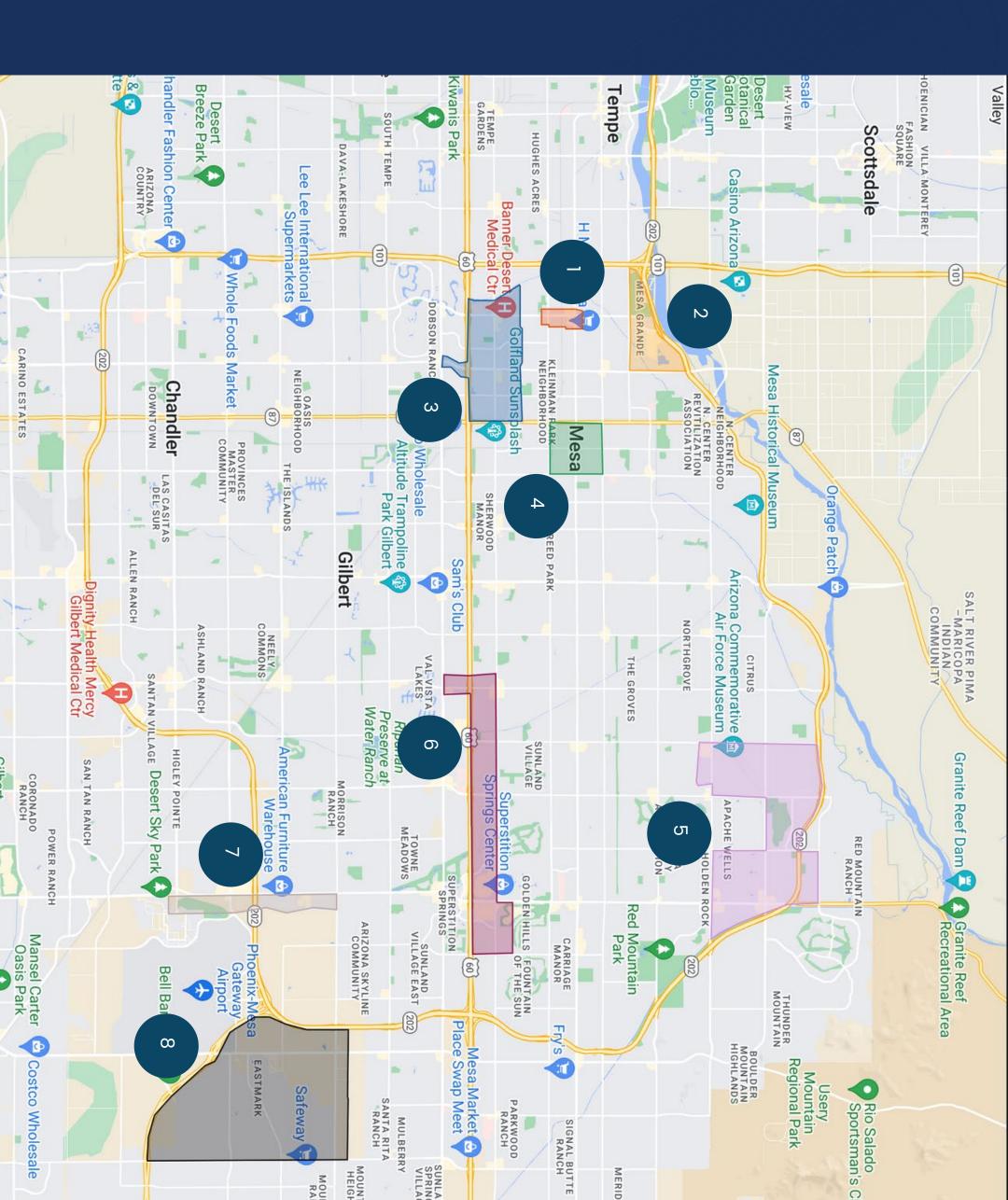
he**Retail**Coach

Task

Retail Analysis

Eight (8) Submarkets for Retail Analysis Understanding Mesa's Targeted

- Asian District
- Riverview
- ω Fiesta
- Downtown
- Northeast Mesa
- 9 Superstition Springs
- **Power Road Corridor**
- Gateway



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The**Retail**Coach

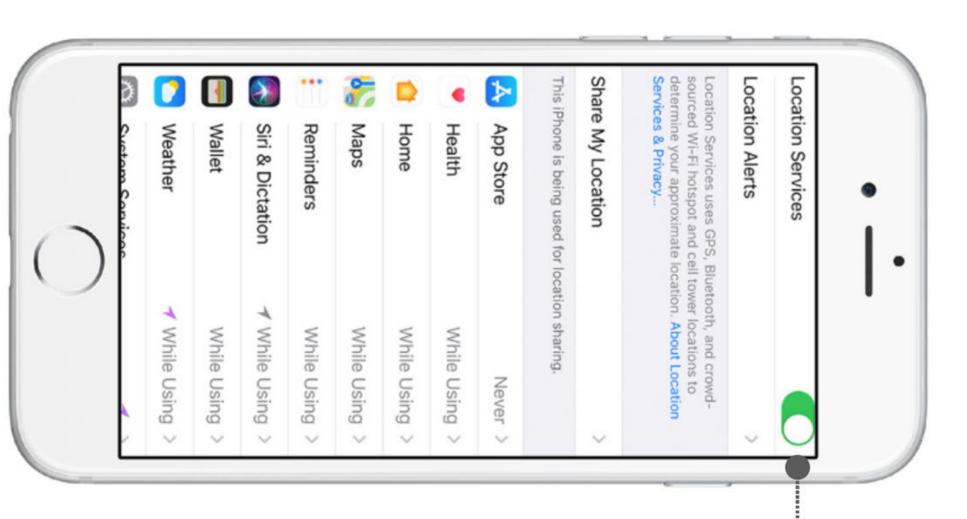
Task 1:

Retail Analysis

Mobile Location Data for Retail Analyzing the Market Using Trade Area Mapping

strategy, and its accuracy is critical. The retail trade area is the foundation of the

Mobile Location Data & Retail Trade Area Mapping



Data **Collection of Consumer Mobile Device**

- High-confidence technology
- Geo-codes telephone calls, emails & texts
- Pinpoints consumer evening locations
- Determines consumer pathto-purchase

Economic Development Committee February 12, 2024 Attachment 1 Page 10 of 30

The Retail Coach

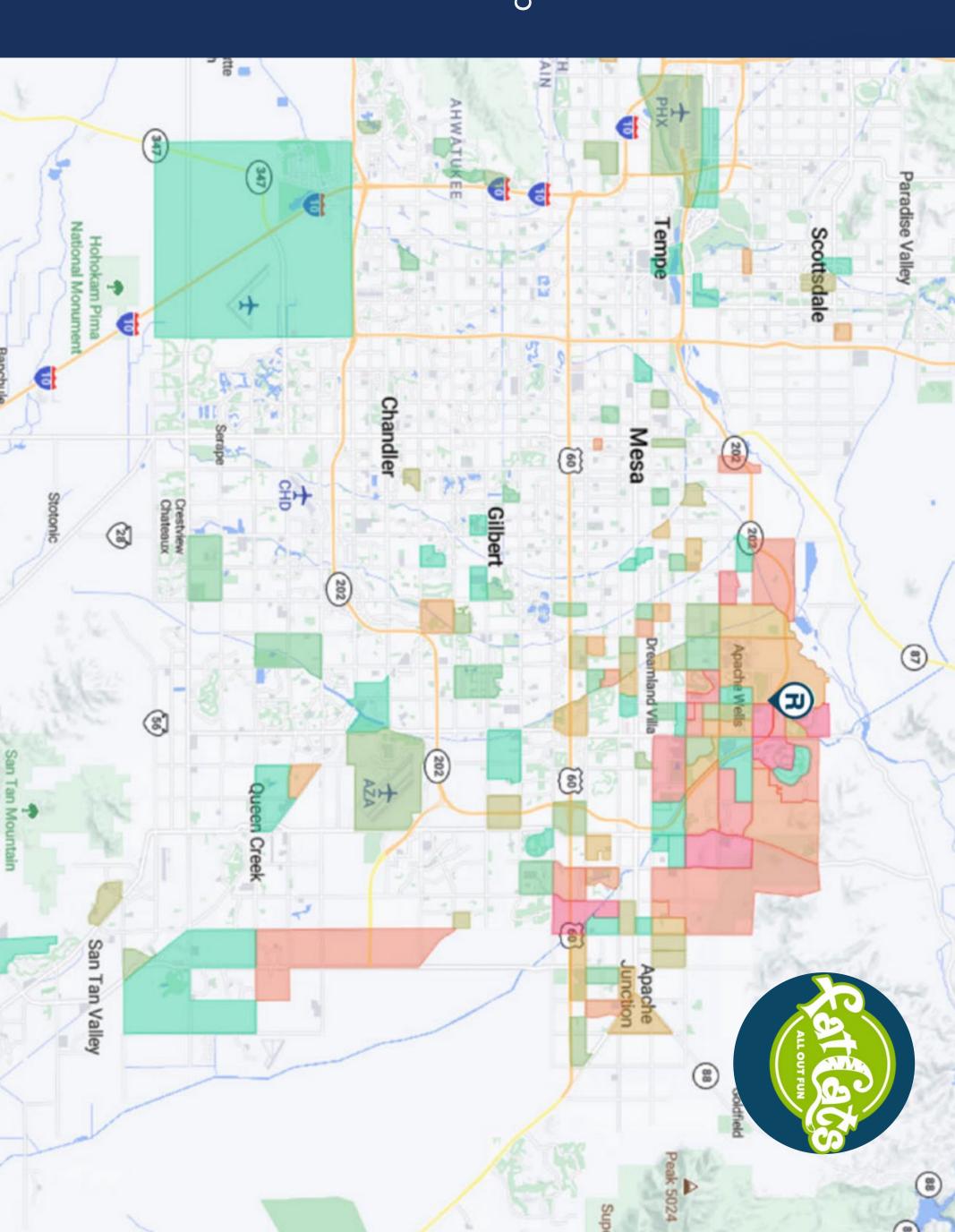
Task 1:

Retail Analysis

Cell Phone Analysis Heatmap

Northeast Mesa Submarket Fat Cats Study





Economic Development Committee February 12, 2024 Attachment 1 Page 11 of 30

The**Retail**Coach

Task 1:

Retail Analysis

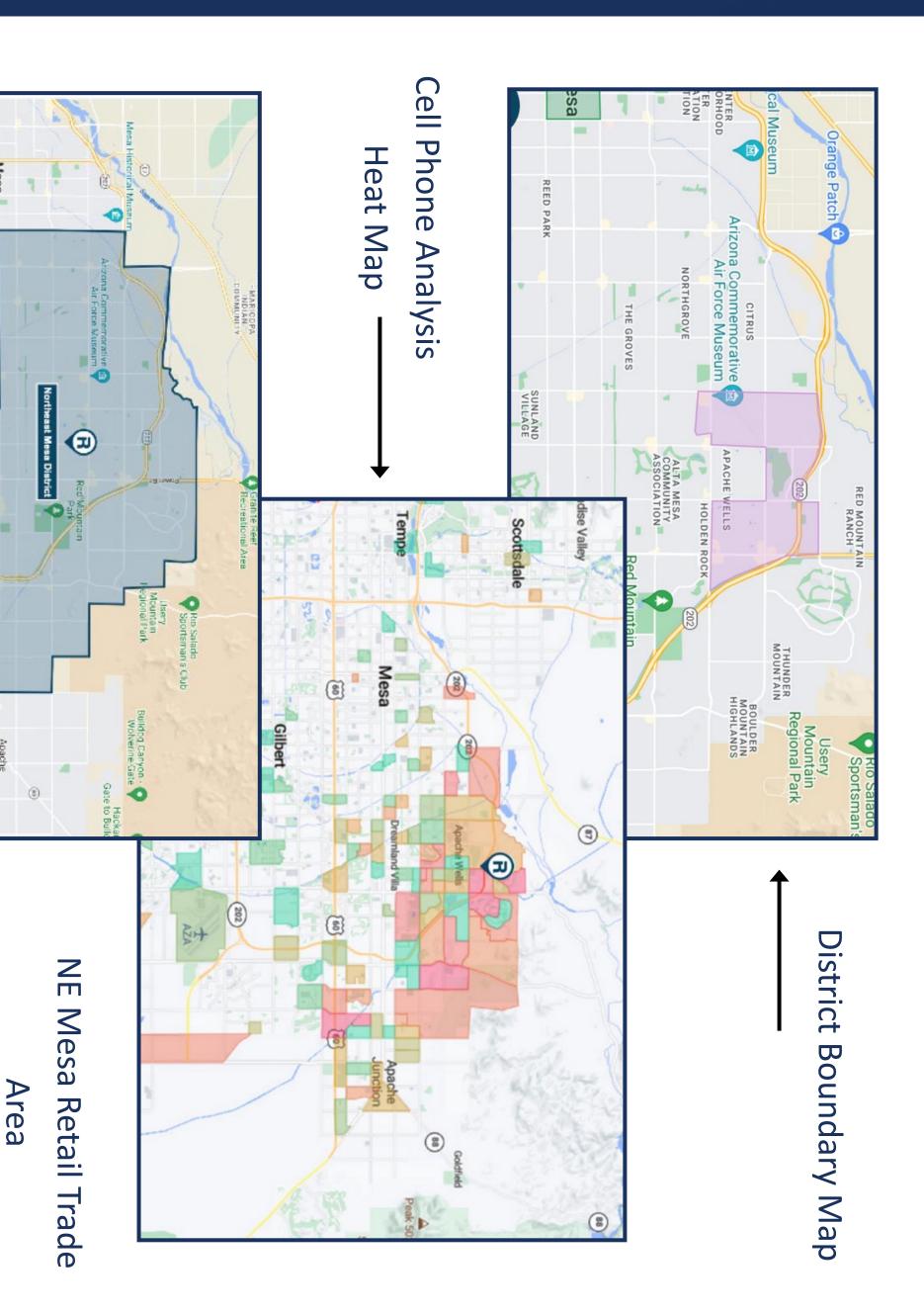
Mapping a Submarket's Retail Trade Area: Northeast Mesa Study

The retail trade area is the foundation of the strategy, and its accuracy is critical.

(2)

(8)

Apache



Economic Development Committee February 12, 2024 Attachment 1 Page 12 of 30

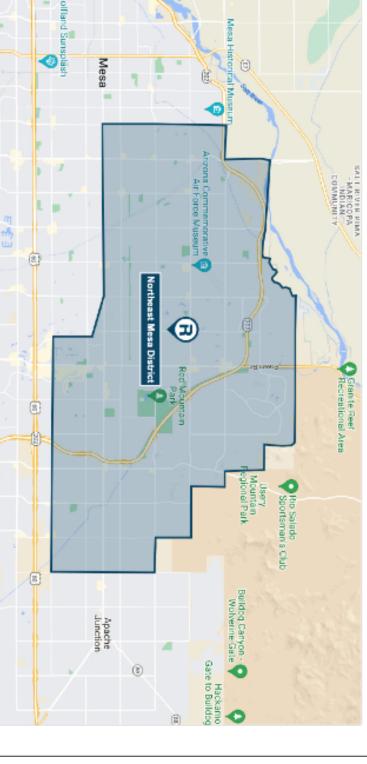
The**Retail**Coach

Task 1: Retail Analysis

Mapping a Submarket's Retail Trade Area: Northeast Mesa Study

Northeast Mesa District Retail Trade Area • Retail Market Profile

Mesa, Arizona



ambisions, changes of price or conditions, prior sale or lease or	guarantees, warranties or representations as to the completeness or accuracy thereof. The properties of this properties is submitted to bioette accura-	The information contained herein was obtained from sources believed to be reliable, however, The Retail Coach, LLC makes no	Per Capita	Median HH		Average HH		Less than 9th Grade	Some High School, No Degree	High School Graduate (or GED)	Some College	Associate Degree	Bachelors Degree	Degree	Graduate or Professional	Educational Attainment (%)	2029	2024	2020	Population
or lease or	completeness or	C makes no	\$43,485	\$70,003	\$78 D63	\$108,177		2.54%	5.42%	24.96%	26.94%	9.85%	19.98%	10.30%		8	220,149	215,999	209,704	
Hispanic	Two or More Races	Other Race	Islander	Native Hawaiian/	Asian	American Indian/ Alaskan	Black/African American	White	Race Distribution (%)	Average Age	Median Age	65 and Older	55 - 64 Years	45 - 54 Years	35 - 44 Years	25 - 34 Years	18 - 24 Years	10 - 17 Years	0 - 9 Years	Age
20.67%	11.17%	8.20%	0.29%		2.02%	1.68%	2.83%	73.81%		44.50	45.53	26.13%	13.56%	10.88%	10.95%	10.73%	7.99%	9.33%	10.44%	



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R The Retail Coach.

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The Retail Coach

Task 1: Retail Analysis

Retail Trade Area: Demographic Snapshot

Total Hade Alea Dellogiapillo Gliapollog	Sindailo Olimballor		
Trade Area	2024 Population	Associates Degree or Higher Education (Age 25+) M	Median Household Income
Riverview	206,603	55,920 (28.25%)	\$62,675
Fiesta	116,123	28,093 (36.12%)	\$58,742
Downtown	118,384	11,953 (28.26%)	\$54,454
Northeast Mesa	215,999	62,630 (40.13%)	\$78,063
Superstition Springs	465,066	137,879 (41.45%)	\$79,648
Gateway/Power Road	222,068	75,571 (55.03%)	\$114,590

Comparing Mesa's Submarkets

Economic Development Committee
February 12, 2024
Attachment 1
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The**Retail**Coach

Task 1: Retail Analysis

Studying Compound Annual
Growth Rate (CAGR%) of Retail
Sectors in Each Submarket

Gateway/Power Road District Retail Trade Area • Retail Demand Outlook

Mesa, Arizona

\$2,346,481,451 \$2,997,032,774 \$550,551,323 \$452,915,769 \$500,319,369 \$147,403,5600 \$4201,099,99 \$531,791,515 \$130,691,516 \$22,915,997 \$33,714,501 \$10,258,504 \$22,915,997 \$33,714,501 \$10,258,504 \$28,899,772 \$35,352,25 \$6,453,580 \$17,149,012 \$23,030,628 \$2,798,350 \$38,330,141 \$47,475,138 \$9,144,997 \$7,554,959 \$13,611,599 \$19,635,199 \$47,954,020 \$186,318,122 \$40,271,014 \$128,172,372 \$163,427,089 \$25,254,716 \$10,683,219 \$41,346,871 \$98,525 \$17,874,031 \$14,516,421 \$13,534,608 \$2,784,346 \$10,683,219 \$413,534,608 \$2,785,139 \$14,516,421 \$18,544,163 \$40,277,742 \$13,330,602 \$417,188,823 \$25,016,297 \$335,069,596 \$412,188,823 \$25,016,297 \$225,600,596 \$412,188,823 \$25,016,297 \$225,600,596 \$412,188,823 \$25,016,297 \$225,600,596 \$412,188,823 \$25,016,297 \$225,600,596 \$412,644,831 \$2,013,232 \$25,025,248 \$12,644,831 \$2,64	NAICS	DESCRIPTION	2023 DEMAND	2028 DEMAND	GROWTH	CAGR (%)*
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Home furnishings stores \$9,291,888 \$12,090,238 \$2,798,350	4421	Furniture stores	\$17,149,012	\$23,030,628	\$5,881,616	6
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Building material and garden equipment and supplies dealers \$11,2,72,372 \$163,427,089 \$35,254,716 Building material and supplies dealers \$11,976,407 \$113,299 \$19,352,999 \$19,353,999 \$19,353,620 \$17,976,60 \$27,743,346 \$113 \$113 \$113 \$113 \$113 \$113 \$113 \$11	443142	Electronics stores	\$30,775,182	\$38,149,213	\$7,374,031	4
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Paint and wallpaper stores \$4,96,3622 \$17,179,668 \$2,754,346	44411	Home centers	\$71,976,400	\$91,611,599	\$19,635,199	4
till delelers (1905) Lawn and garden equipment and supplies (1905) Lawn and garden equipment and supplies (1905) Lawn and garden equipment stores (1905) Mursery, garden center, and farm supply (1905) Food and beverage stores (1905) Food and beverage stores (1905) Food and beverage stores (1905) Food and other gooety (except) (1905) Food and other goods (except) (1905) Food and beverage stores (1905) Food and beverage stores (1905) Food and other goods (except) (1905) Food and personal care stores (1905) Food and double goods (except) (1905) Fo	44412	Paint and wallpaper stores	\$4,963,622	\$7,717,968	\$2,754,346	9
Children's supplies, and legaler's \$40,549,131 \$50,562,914 \$10,013,783 \$1,774,777 \$2,2891,034 \$5,016,297 \$11 Outdoor power equipment and supplies \$4,346,871 \$588,555 \$12,241,163 \$4,346,871 \$588,555 \$12,241,164,221 \$18,544,163 \$4,027,742 \$18,544,163 \$4,027,742 \$18,544,163 \$4,027,742 \$18,544,163 \$4,027,742 \$18,544,163 \$4,027,742 \$18,544,163 \$4,027,742 \$18,544,163 \$4,027,742 \$18,544,163 \$4,027,742 \$18,544,163 \$4,027,742 \$18,544,163 \$4,027,742 \$18,544,163 \$4,027,742 \$16,00,396 \$412,188,823 \$12,540,245 \$18,544,163 \$4,027,742 \$16,00,396 \$412,188,823 \$12,540,245 \$12,644,831 \$1,00,377 \$1,00,491,462 \$12,644,831 \$1,00,377 \$1,00,491,462 \$12,644,831 \$1,00,491,277 \$1,00,491,462 \$12,644,831 \$1,00,491,277 \$1,00,491,462 \$1	44413	Hardware stores	\$10,683,219	\$13,534,608	\$2,851,389	4
Lawn and garden equipment and supplies stores (17,874,737) \$22,891,034 \$5,016,297 Outdoor power equipment stores \$4,346,871 \$988,555 (17,294,742) \$1,100 (17,422) \$1,100 (17,4	44419	Other building material dealers	\$40,549,131	\$50,562,914	\$10,013,783	4
121 Outdoor power equipment stores \$3,358,316 \$4,346,871 \$988,555 122 Nursery, garden center, and farm supply \$11,516,421 \$18,544,163 \$4,027,742 511 Food and beverage stores \$359,685,606 \$455,663,733 \$95,978,127 1511 Supermarkets and other grocery (sevent) \$312,294,576 \$412,188,823 \$86,588,227 1522 Convenience stores \$133,06,021 \$16,601,875 \$3,259,855 22 Specialty food stores \$9,970,548 \$12,644,831 \$2,674,284 23 Beer, wine, and liquor stores \$46,890,590 \$578,564,802 \$16,536,744 4111 Pharmacles and order stores \$46,890,590 \$59,225,588 \$12,401,968 511 Pharmacles and drug stores \$46,890,590 \$59,225,588 \$12	4442	Lawn and garden equipment and supplies	\$17,874,737	\$22,891,034	\$5,016,297	5
Nursery, garden center, and farm supply stores stores \$359,685,606 \$455,663,733 \$95,978,127 Food and beverage stores \$359,685,606 \$455,663,733 \$95,978,127 Grocery stores \$325,600,596 \$412,188,823 \$86,588,227 Grocery (except convenience) stores \$325,600,596 \$412,188,823 \$86,588,227 Convenience stores \$312,294,576 \$395,586,948 \$83,292,372 Convenience stores \$13,306,021 \$16,601,875 \$3,225,855 \$2,674,284 \$12,644,831 \$2,644,831 \$2,674,284 \$12,644,831 \$2,674,284 \$12,644,831 \$2,674,284 \$12,644,831 \$2,674,284 \$12,644,831 \$2,674,284 \$12,644,831 \$2,674,284 \$12,644,831 \$2,674,284 \$12,644,831 \$2,674,284 \$12,644,831 \$2,674,284 \$12,644,831 \$2,674,284 \$12,644,831 \$2,674,284 \$12,644,831 \$2,674,284 \$12,644,831 \$2,674,284 \$12,644,831 \$2,674,284 \$12,644,831 \$2,674,284 \$12,644,831 \$2,674,284 \$12,644,831 \$2,674,284 \$12,644,831 \$2,674,284 \$12,644,831 \$2,674,284 \$12,644,831 \$1,644,284 \$1,644,831 \$	44421	Outdoor power equipment stores	\$3,358,316	\$4,346,871	\$988,555	5
Food and beverage stores \$35,685,606 \$45,563,733 \$95,978,127	44422	Nursery, garden center, and farm supply stores	\$14,516,421	\$18,544,163	\$4,027,742	5
Grocery stores \$325,600,596 \$412,188,823 \$86,588,227 convenience stores \$312,294,576 \$395,586,948 \$83,292,372 convenience stores \$13,294,576 \$395,586,948 \$83,292,372 convenience stores \$13,204,576 \$395,586,948 \$83,292,372 convenience stores \$13,306,021 \$16,601,875 \$3,295,855 \$2,292,585 \$2,292,592 \$2,292,292,585 \$2,292,292,588 \$2,292,292,588 \$2,292,292,588 \$2,292,292,588 \$2,292,292,588 \$2,292,292,588 \$2,292,292,588 \$2,292,292,588 \$2,292,292,593 \$2,292,292,292,593 \$2,292,292,292,292,292,292,292,292,292,2	445	Food and beverage stores	\$359,685,606	\$455,663,733	\$95,978,127	4
Supermarkets and other grocery (except \$312,294,576 \$395,586,948 \$83,292,372	4451	Grocery stores	\$325,600,596	\$412,188,823	\$86,588,227	4.83%
Convenience stores \$13,306,021 \$16,601,875 \$3,295,855 \$22 \$22,044,831 \$2,674,284 \$12,644,831 \$2,674,284 \$12,644,831 \$2,674,284 \$12,644,831 \$2,674,284 \$12,644,831 \$2,674,284 \$12,644,831 \$2,674,284 \$12,644,831 \$2,674,284 \$12,644,831 \$2,674,284 \$12,644,831 \$2,674,284 \$12,644,831 \$2,674,284 \$12,644,831 \$2,674,284 \$12,644,831 \$2,674,284 \$12,644,831 \$2,674,284 \$12,644,831 \$2,674,284 \$12,644,831 \$2,674,284 \$12,644,831 \$2,674,284 \$12,644,831 \$2,674,284 \$12,644,831 \$2,674,284 \$12,641,968 \$111 Pharmacies and drug stores \$46,890,590 \$59,292,558 \$12,401,968 \$112 Cosmetics, beauty supplies, and perfume \$3,093,930 \$3,919,832 \$825,902 \$112 Cosmetics, beauty supplies, and perfume \$3,093,930 \$3,919,832 \$825,902 \$112 Cothing and clothing accessories stores \$42,642,940 \$290,693,536 \$67,830,596 \$113 Clothing and clothing stores \$479,245,229 \$92,575,427 \$13,330,098 \$114 Pharmacy clothing stores \$47,245,229 \$92,575,427 \$1,330,998 \$114 Pharmacy clothing stores \$47,245,247 \$1,745,144 \$192,867 \$1179,2867 \$1179,	44511	Supermarkets and other grocery (except	\$312,294,576	\$395,586,948	\$83,292,372	4
Specialty food stores \$9,970,548 \$12,644,831 \$2,674,284 Beer, wine, and liquor stores \$24,114,462 \$30,830,079 \$6,715,617 Health and personal care stores \$62,048,058 \$78,584,802 \$16,536,744 Pharmacies and drug stores \$46,890,590 \$59,292,558 \$12,401,968 Cosmetics, beauty supplies, and perfume stores \$3,093,930 \$3,919,832 \$825,902 Optical goods stores \$9,450,245 \$12,040,529 \$2,590,284 Gasoline stations \$222,862,940 \$290,693,536 \$67,830,596 Clothing accessories stores \$1,842,317 \$58,871,892 \$7,029,575 R811 Women's clothing stores \$1,842,317 \$58,871,892 \$7,029,575 R812 Children's and infants' clothing stores \$1,842,317 \$1,745,144 \$192,867 R813 Children's and infants' clothing stores \$30,572,524 \$35,232,476 \$1,79,568 R814 Clothing accessories stores \$3,913,433 \$4,316,391 \$40,659,952 R815 Clothing stores \$1,2071,513 \$1,745,144 \$1,79,568 R816 Clothing stores \$1,2071,513 \$4,316,391 \$40,659,952 Shoe stores \$1,2071,513 \$1,509,581 \$3,488,068 Shoe stores \$1,2071,513 \$1,509,581 \$3,488,068 Shoe stores \$1,533,499 \$1,8193,954 \$2,862,445 Shoe stores \$1,533,499 \$1,8193,954 \$2,862,455 Shoe stores \$1,533,499 \$1,8193,954 \$2,862,455 Shoe stores \$1,533,499 \$1,8193,954 \$2,862,455	44512	Convenience stores	\$13,306,021	\$16,601,875	\$3,295,855	4
Beer, wine, and liquor stores \$24,114,462 \$30,830,079 \$6,715,617 Health and personal care stores \$62,048,058 \$78,584,802 \$16,536,744 Pharmacies and drug stores \$46,890,590 \$59,292,558 \$12,401,968 Cosmetics, beauty supplies, and perfume \$3,093,930 \$3,919,832 \$825,902 Stores \$9,450,245 \$12,040,529 \$2,590,284 Optical goods stores \$2,613,293 \$3,331,884 \$718,591 Gasoline stations \$222,862,940 \$290,693,536 \$67,830,596 Clothing and clothing accessories stores \$1,842,317 \$13,330,098 Refail Men's clothing stores \$1,582,277 \$1,745,144 \$192,867 Refaily clothing stores \$4,347,199 \$9,526,767 \$1,799,568 Refail Children's and infants' clothing stores \$4,347,199 \$9,526,767 \$1,799,568 Clothing accessories stores \$4,347,199 \$9,526,767 \$1,799,568 Clothing accessories stores \$4,347,199 \$9,526,767 \$1,799,568 Clothing accessories stores \$4,315,331,499 \$9,526,767 \$4,869,952 Shoe stores \$1,531,499 \$18,193,954 \$2,862,455 Jewelry, luggage, and leather goods stores \$15,331,499 \$18,193,954 \$2,862,455 Ball Jewelry, luggage, and leather goods stores \$15,331,499 \$18,193,954 \$2,862,455	4452	Specialty food stores	\$9,970,548	\$12,644,831	\$2,674,284	4
Health and personal care stores \$62,048,058 \$78,584,802 \$16,536,744 Pharmacies and drug stores \$46,890,590 \$59,292,558 \$12,401,968 Cosmetics, beauty supplies, and perfume \$3,093,930 \$3,919,832 \$825,902 Stores \$9,450,245 \$12,040,529 \$2,590,284 Cosmetics, beauty supplies, and perfume \$3,093,930 \$3,919,832 \$825,902 Stores \$9,450,245 \$12,040,529 \$2,590,284 Cosmetics, beauty supplies, and perfume \$2,613,293 \$3,331,884 \$718,591 Gasoline stations \$222,862,940 \$290,693,536 \$67,830,596 Clothing accessories stores \$47,045,329 \$92,575,427 \$13,330,098 Stores \$1,842,317 \$58,871,892 \$7,029,575 Men's clothing stores \$1,842,317 \$58,871,892 \$7,029,575 Women's clothing stores \$1,842,317 \$1,745,144 \$192,867 B811 Children's and infants' clothing stores \$1,347,199 \$9,526,767 \$1,719,568 B813 Children's and infants' stores \$1,347,199 \$9,526,767 \$1,179,568 B814 Family clothing stores \$3,072,524 \$35,232,476 \$4,659,952 Clothing accessories stores \$1,071,513 \$15,509,581 \$4,629,952 Shoe stores \$1,071,513 \$15,509,581 \$3,438,068 Jewelry, luggage, and leather goods stores \$1,5331,499 \$18,193,954 \$2,862,455 B831 Jewelry, luggage, and leather goods stores \$1,5331,499 \$18,193,954 \$2,862,455	4453	Beer, wine, and liquor stores	\$24,114,462	\$30,830,079	\$6,715,617	5
511 Pharmacies and drug stores \$46,890,590 \$59,292,558 \$12,401,968 512 Cosmetics, beauty supplies, and perfume stores \$3,093,930 \$3,919,832 \$825,902 513 Optical goods stores \$9,450,245 \$12,040,529 \$2,590,284 519 Other health and personal care stores \$222,862,940 \$290,693,536 \$67,830,596 Clothing and clothing accessories stores \$79,245,329 \$29,575,427 \$13,330,098 S11 Clothing and clothing stores \$79,245,329 \$92,575,427 \$13,330,098 S811 Men's clothing stores \$1,552,277 \$1,745,144 \$192,867 I812 Women's clothing stores \$3,347,199 \$9,526,767 \$1,179,568 I813 Children's and infants' clothing stores \$3,471,99 \$9,526,767 \$1,179,568 I814 Clothing accessories stores \$3,913,453 \$4,363,91 \$306,531 I819 Children's and infants' clothing stores \$3,471,99 \$9,526,767 \$1,179,568 I819 Children's and infants' clothing stores \$3,431,633 \$3,432,69,952	446	Health and personal care stores	\$62,048,058	\$78,584,802	\$16,536,744	4
Clothing and clothing stores \$1,245,277 \$1,330,098 (Clothing stores stations station	44611	Pharmacies and drug stores	\$46,890,590	\$59,292,558	\$12,401,968	4
Optical goods stores \$9,450,245 \$12,040,529 \$2,590,284 \$19 Other health and personal care stores \$2,613,293 \$3,331,884 \$718,591 \$19 Other health and personal care stores \$2,2862,940 \$2,90,693,536 \$67,830,596 \$11 Glothing accessories stores \$79,245,329 \$92,575,427 \$13,330,098 \$11 Clothing stores \$51,842,317 \$58,871,892 \$7,029,575 \$11 Men's clothing stores \$1,552,277 \$1,745,144 \$192,867 \$1812 Women's clothing stores \$1,552,277 \$1,745,144 \$192,867 \$1,79,568 \$1,719,568 \$1,	44612	Cosmetics, beauty supplies, and perfume	\$3,093,930	\$3,919,832	\$825,902	4
Gasoline stations \$2,21,862,940 \$290,693,536 \$67,830,596 \$13,331,884 \$718,591 \$1 \$222,862,940 \$290,693,536 \$67,830,596 \$1 \$1 \$Clothing and clothing accessories stores \$79,245,329 \$92,575,427 \$13,330,098 \$11 \$Men's clothing stores \$1,842,317 \$58,871,892 \$7,029,575 \$1811 \$Men's clothing stores \$1,552,277 \$1,745,144 \$192,867 \$1812 \$Children's and infants' clothing stores \$8,347,199 \$9,526,767 \$1,779,568 \$1,179,568 \$1,	44613	Optical goods stores	\$9,450,245	\$12,040,529	\$2,590,284	4.96%
Clothing and clothing stores \$79,245,329 \$92,575,427 \$13,330,098 Residence of the property of	44619	Other health and personal care stores	\$2,613,293	\$3,331,884	\$718,591	4
Clothing and clothing accessories stores \$79,245,329 \$92,575,427 \$13,330,098 81 Clothing stores \$51,842,317 \$58,871,892 \$7,029,575 811 Men's clothing stores \$1,552,277 \$1,745,144 \$192,867 812 Women's clothing stores \$8,347,199 \$9,526,767 \$1,179,568 813 Children's and infants' clothing stores \$5,341,823 \$5,648,355 \$306,531 Family clothing stores \$30,572,524 \$35,232,476 \$4,659,952 815 Clothing accessories stores \$2,115,041 \$2,402,760 \$287,718 819 Other clothing stores \$3,913,453 \$4,316,391 \$402,938 810 Shoe stores \$12,071,513 \$15,509,581 \$3,438,068 810 Jewelry, luggage, and leather goods stores \$15,331,499 \$18,193,954 \$2,862,455 811 Jewelry, luggage, and leather \$1,023,724 \$12,558,971 \$2,035,247	447	Gasoline stations	\$222,862,940	\$290,693,536	\$67,830,596	5.
Clothing stores \$51,842,317 \$58,871,892 \$7,029,575 11	448	Clothing and clothing accessories stores	\$79,245,329	\$92,575,427	\$13,330,098	3.16%
Men's clothing stores \$1,552,277 \$1,745,144 \$192,867 Women's clothing stores \$8,347,199 \$9,526,767 \$1,179,568 Children's and infants' clothing stores \$5,341,823 \$5,648,355 \$306,531 Family clothing stores \$30,572,524 \$35,232,476 \$4,659,952 Clothing accessories stores \$2,115,041 \$2,402,760 \$287,718 Clothing stores \$3,913,453 \$4,316,391 \$402,938 Shoe stores \$12,071,513 \$15,509,581 \$3,438,068 Jewelry, luggage, and leather goods stores \$15,331,499 \$18,193,954 \$2,862,455 Jewelry, luggage, and leather stores \$10,523,724 \$12,558,971 \$2,035,247	4481	Clothing stores	\$51,842,317	\$58,871,892	\$7,029,575	2.
Women's clothing stores \$8,347,199 \$9,526,767 \$1,179,568 Children's and infants' clothing stores \$5,341,823 \$5,648,355 \$306,531 Children's and infants' clothing stores \$5,341,823 \$5,648,355 \$306,531 Family clothing stores \$30,572,524 \$35,232,476 \$4,659,952 Clothing accessories stores \$2,115,041 \$2,402,760 \$287,718 Other clothing stores \$3,913,453 \$4,316,391 \$402,938 Shoe stores \$12,071,513 \$15,509,581 \$3,438,068 Jewelry, luggage, and leather goods stores \$15,331,499 \$18,193,954 \$2,862,455 Jewelry, luggage, and leather goods \$10,523,724 \$12,558,971 \$2,035,247	44811	Men's clothing stores	\$1,552,277	\$1,745,144	\$192,867	2.
Children's and infants' clothing stores \$5,341,823 \$5,648,355 \$306,531 Family clothing stores \$30,572,524 \$35,232,476 \$4,659,952 Clothing accessories stores \$2,115,041 \$2,402,760 \$287,718 Clothing stores \$3,913,453 \$4,316,391 \$402,938 Shoe stores \$12,071,513 \$15,509,581 \$3,438,068 Jewelry, luggage, and leather goods stores \$15,331,499 \$18,193,954 \$2,862,455 Jewelry, luggage, and leather goods \$10,523,724 \$12,558,971 \$2,035,247	44812	Women's clothing stores	\$8,347,199	\$9,526,767	\$1,179,568	2
14 Family clothing stores \$30,572,524 \$35,232,476 \$4,659,952 15 Clothing accessories stores \$2,115,041 \$2,402,760 \$287,718 19 Other clothing stores \$3,913,453 \$4,316,391 \$402,938 19 Shoe stores \$12,071,513 \$15,509,581 \$3,438,068 25 Shoe stores \$15,331,499 \$18,193,954 \$2,862,455 26 Jewelry, luggage, and leather goods stores \$10,523,724 \$12,558,971 \$2,035,247 26 Jewelry stores \$10,523,724 \$12,558,971 \$2,035,247	44813	Children's and infants' clothing stores	\$5,341,823	\$5,648,355	\$306,531	_
Clothing accessories stores \$2,115,041 \$2,402,760 \$287,718 Other clothing stores \$3,913,453 \$4,316,391 \$402,938 Shoe stores \$12,071,513 \$15,509,581 \$3,438,068 Jewelry, luggage, and leather goods stores \$15,331,499 \$18,193,954 \$2,862,455 Jewelry, luggage, and leather goods \$10,523,724 \$12,558,971 \$2,035,247	44814	Family clothing stores	\$30,572,524	\$35,232,476	\$4,659,952	2.
Other clothing stores \$3,913,453 \$4,316,391 \$402,938 Shoe stores \$12,071,513 \$15,509,581 \$3,438,068 Jewelry, luggage, and leather goods stores \$15,331,499 \$18,193,954 \$2,862,455 Jewelry stores \$10,523,724 \$12,558,971 \$2,035,247	44815	Clothing accessories stores	\$2,115,041	\$2,402,760	\$287,718	2.
Shoe stores \$12,071,513 \$15,509,581 \$3,438,068 Jewelry, luggage, and leather goods stores \$15,331,499 \$18,193,954 \$2,862,455 Jewelry stores \$10,523,724 \$12,558,971 \$2,035,247	44819	Other clothing stores	\$3,913,453	\$4,316,391	\$402,938	
Jeweiry, luggage, and leatner goods stores \$15,331,499 \$18,193,954 \$2,862,455 31 Jeweiry stores \$10,523,724 \$12,558,971 \$2,035,247	4482	Shoe stores	\$12,071,513	\$15,509,581	\$3,438,068	ı vı
Jeweil A 10/2001/21 +1 (2/2001/21 +1/2001/21 +1/2001/21 +1/2001/21 +1/2001/21 +1/2001/21	4483	Jeweiry, luggage, and learner goods stores	\$10,531,499 \$10,533,734	\$13,193,954	\$2,862,455	. u
	44831	Jeweiry stores	\$10,523,724	\$12,558,971	\$2,035,24/	3.60%

Economic Development Committee February 12, 2024 Attachment 1 Page 15 of 30

The**Retail**Coach

Task 1: Retail Analysis

Studying Compound Annual
Growth Rate (CAGR%) of Retail
Sectors in Each Submarket

Downtown District Retail Tra de Area • Retail Demand Outlook

Mesa, Arizona

NAICS	DESCRIPTION	2023 DEMAND	2028 DEMAND	GROWTH	CAGR (%)*
451	Sporting goods, hobby, musical instrument, and book stores	\$20,247,845	\$22,923,439	\$2,675,594	2.51%
4511	Sporting goods, hobby, and musical instrument stores	\$14,785,295	\$16,366,895	\$1,581,600	2.05%
45111	Sporting goods stores	\$9,643,153	\$10,697,401	\$1,054,248	2.10%
45112	Hobby, toy, and game stores	\$3,707,507	\$4,112,631	\$405,124	2.10%
45113	Sewing, needlework, and piece goods stores	\$725,625	\$737,440	\$11,814	0.32%
45114	Musical instrument and supplies stores	\$709,010	\$819,424	\$110,414	2.94%
4512	Book stores and news dealers	\$5,462,550	\$6,556,544	\$1,093,994	3.72%
452	General merchandise stores	\$111,463,981	\$127,129,637	\$15,665,656	2.67%
4522	Department stores	\$10,327,247	\$10,797,923	\$470,676	0.90%
4523	Other general merchandise stores	\$101,136,734	\$116,331,714	\$15,194,980	2.84%
453	Miscellaneous store retailers	\$16,727,425	\$19,391,801	\$2,664,376	3.00%
4531	Florists	\$738,477	\$870,739	\$132,262	3.35%
4532	Office supplies, stationery, and gift stores	\$2,634,803	\$3,028,079	\$393,276	2.82%
45321	Office supplies and stationery stores	\$1,203,165	\$1,403,871	\$200,706	3.13%
45322	Gift, novelty, and souvenir stores	\$1,431,638	\$1,624,208	\$192,570	2.56%
4533	Used merchandise stores	\$2,270,035	\$2,559,148	\$289,113	2.43%
4539	Other miscellaneous store retailers	\$11,084,110	\$12,933,835	\$1,849,725	3.13%
45391	Pet and pet supplies stores	\$4,806,032	\$5,755,280	\$949,249	3.67%
45399	All other miscellaneous store retailers	\$6,278,078	\$7,178,554	\$900,476	2.72%
454	Non-store retailers	\$142,356,258	\$164,922,214	\$22,565,956	2.99%
722	Food services and drinking places	\$111,400,791	\$130,301,563	\$18,900,772	3.18%
7223	Special food services	\$7,569,461	\$8,868,665	\$1,299,205	3.22%
7224	Drinking places (alcoholic beverages)	\$2,614,308	\$3,156,972	\$542,665	3.84%
7225	Restaurants and other eating places	\$101,217,023	\$118,275,925	\$17,058,902	3.16%
722511	Full-service restaurants	\$48,544,708	\$56,882,694	\$8,337,986	3.22%
722513	Limited-service restaurants	\$44,647,735	\$52,047,270	\$7,399,535	3.11%
722514	Cafeterias, grill buffets, and buffets	\$1,138,923	\$1,327,704	\$188,782	3.11%
722515	Snack and nonalcoholic beverage bars	\$6,885,657	\$8,018,257	\$1,132,600	3.09%

Economic Development Committee February 12, 2024 Attachment 1 Page 16 of 30

The**Retail**Coach

Task 1: Retail Analysis

Demographic & Growth Comparisons By Submarket

Retail Trade Area: Demographic Snapshot

Trade Area	2024 Population	2024 Population Associates Degree or Higher Education (Age 25+) Median Househo	Median Household Income
Riverview	206,603	55,920 (28.25%)	\$62,675
Fiesta	116,123	28,093 (36.12%)	\$58,742
Downtown	118,384	11,953 (28.26%)	\$54,454
Northeast Mesa	215,999	62,630 (40.13%)	\$78,063
Superstition Springs	465,066	137,879 (41.45%)	\$79,648
Gateway/Power Road	222,068	75,571 (55.03%)	\$114,590

Trade Area: Retail Demand Outlook Snapshot

Retail Trade Area: Retail Demand Outlook Snapshot	Demand Outlook	onapsnot	
Trade Area	2023 DEMAND 2028 DEMAND	2028 DEMAND	GROWTH
Riverview	\$1,977,913,742	\$2,324,620,732	\$346,706,990
Fiesta	\$1,085,024,882	\$1,252,601,944	\$167,577,062
Downtown	\$977,474,298	\$1,128,588,004	\$151,113,706
Northeast Mesa	\$2,490,601,810	\$2,914,682,581	\$424,080,771
Superstition Springs	\$5,210,767,627	\$6,179,257,242	\$968,489,615
Gateway/Power Road	\$2,346,481,451	\$2,997,032,774	\$650,551,323

Economic Development Committee February 12, 2024 Attachment 1 Page 17 of 30

[he**Retail**Coach

Task 1:

Retail Analysis

Demographic & Growth Comparisons By Submarket

 Population
 199,964

 2020
 206,603

 2029
 211,290

Mesa, Arizona Riverview District Retail Trade Area • Retail Market Profile Tempe Scottsdal (2) Riverview District nd Sunsplash Mesa Historical Museum R Mesa Arizona Commem Air Force M SALT RIVER PIMA -MARICOPA INDIAN COMMUNITY d useum 202 Granite Red Moun Park

4.08%	\$11,273,456	\$62,242,432	\$50,968,977	Health and personal care stores
3.29%	\$53,162,082	\$355,698,836	\$302,536,754	Food and beverage stores
4.29%	\$27,929,734	\$147,449,563	\$119,519,829	Building material and garden equipment and supplies dealers
3.22%	\$5,562,520	\$37,957,661	\$32,395,141	Electronics and appliance stores

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The**Retail**Coach

Task 1 Retail Analysis

Demographic & Growth

Comparisons By Submarket

2029	2024	2020	Population
117,552	116,123	113,485	

Mesa, Arizona Fiesta District Retail Trade Tempe DH nosdod M (60) B **Area** • Retail Market Profile Mesa E Main St Freestone District Park Fat Cats Gilbert

Total retail trade including food and drinking places	Description
\$1,085,024,882	2023 DEMAND
\$1,252,601,944	2028 DEMAND
\$167,577,062	GROWTH
2.91%	CAGR (%)

Electronics and appliance stores	\$17,802,825	\$20,634,858	\$2,832,033	3.00%
Building material and garden equipment and supplies dealers	\$64,880,241	\$80,403,705	\$15,523,464	4.38%
Food and beverage stores	\$166,639,958	\$192,639,880	\$25,999,922	2.94%
Health and personal care stores	\$27,845,924	\$33,913,024	\$6,067,100	4.02%
Gasoline stations	\$99,895,439	\$121,990,348	\$22,094,909	4.08%

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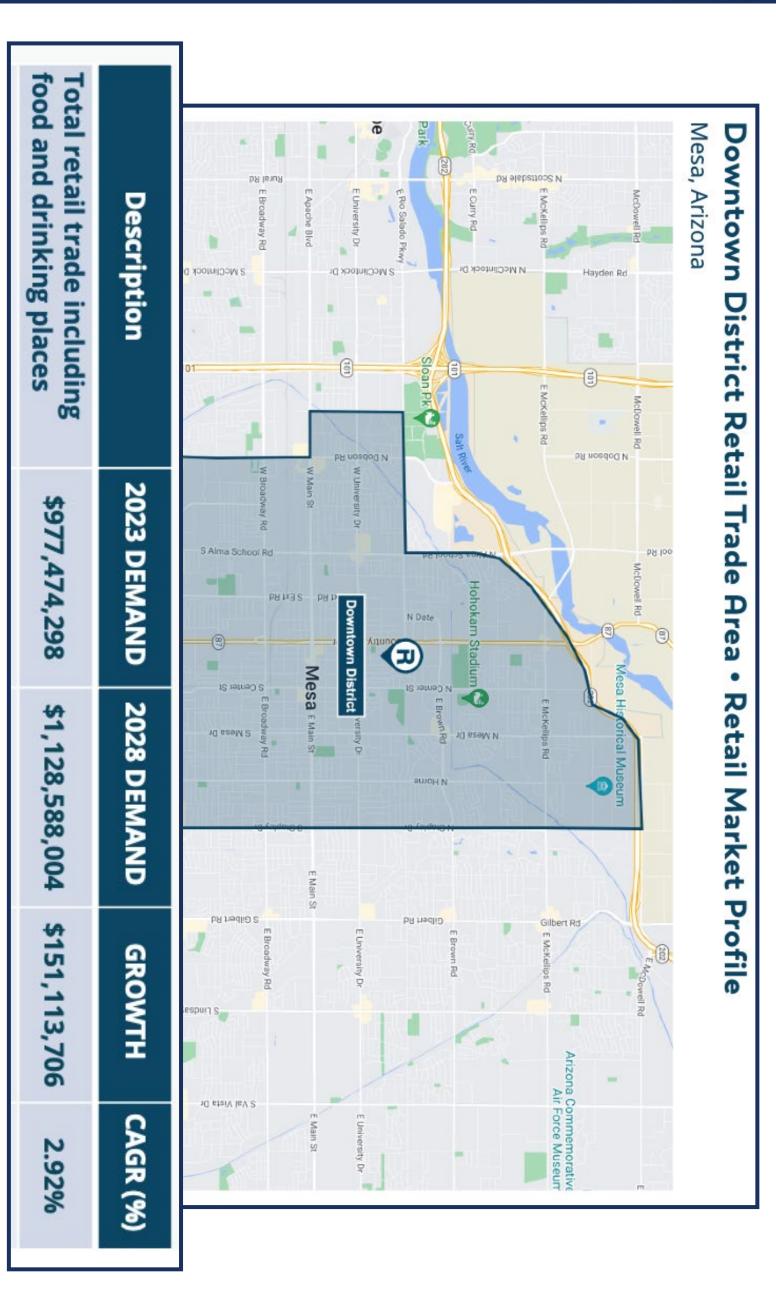
The**Retail**Coach

Task 1:

Retail Analysis

Demographic & Growth Comparisons By Submarket

110 900	2029
118,384	2024
115,673	2020



3.18%	\$18,900,772	\$130,301,563	\$111,400,791	Food services and drinking places
4.75%	\$14,982,568	\$72,379,465	\$57,396,897	Building material and garden equipment and supplies dealers

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The**Retail**Coach

Task 1:

Retail Analysis

Demographic & Growth Comparisons By Submarket

Population	
2020	209,704
2024	215,999
2029	220,149

food and drinking places

Total retail trade including

\$2,490,60

01,810

\$2,914,682,581

\$424,080,771

3.19%

Description

2023 DEN

AND

2028 DEMAND

GROWTH

CAGR (%)

Solfland Sunsplash Mesa, Arizona Northeast Mesa District Retail Mesa Historical Museum Mesa (202 Arizona Commemorative SALT RIVER PIMA -MARICOPA INDIAN COMMUNITY 8 Northeast \odot Mesa District Trade Area • Retail Market Profile Recreational Area Red Mountain Park 8 (202) Usery Mountain egional Park Rio Salado Sportsman's Club (8) Bulldog Canyon - Wolverine Gate Apache Hackamo Gate to Bulldog (88)

3.72%	\$12,984,580	\$77,823,142	\$64,838,562	Health and personal care stores
3.93%	\$78,410,874	\$447,262,124	\$368,851,250	Food and beverage stores
3.63%	\$31,375,187	\$192,149,510	\$160,774,323	Building material and garden equipment and supplies dealers
3.04%	\$6,535,096	\$46,957,630	\$40,422,535	Electronics and appliance stores

Economic Development Committee . February 12, 2024 Attachment 1 Page 21 of 30

The**Retail**Coach。 Task 1:

Retail Analysis

Comparisons By Submarket Demographic & Growth

482,005	2029
465,066	2024
442,281	2020
	Population

food and drinking places

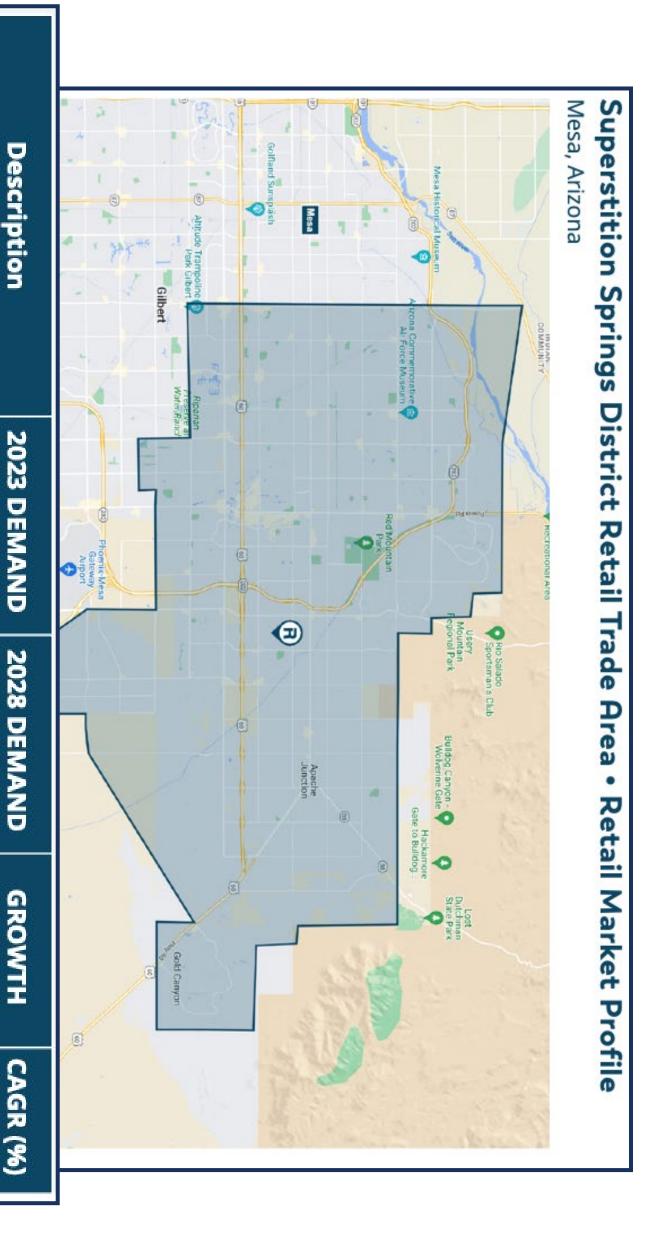
Total retail trade including

\$5,210,767,627

\$6,179,257,242

\$968,489,615

3.47%



General merchandise stores	Sporting goods, hobby, musical instrument, and book stores
\$581,218,259	\$110,664,229
\$691,149,188	\$126,880,980
\$109,930,929	\$16,216,751
3.53%	2.77%

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The**Retail**Coach

Task 1:

Retail Analysis

Demographic & Growth Comparisons By Submarket

2029	2024	2020	Population
236,874	222,068	203,376	

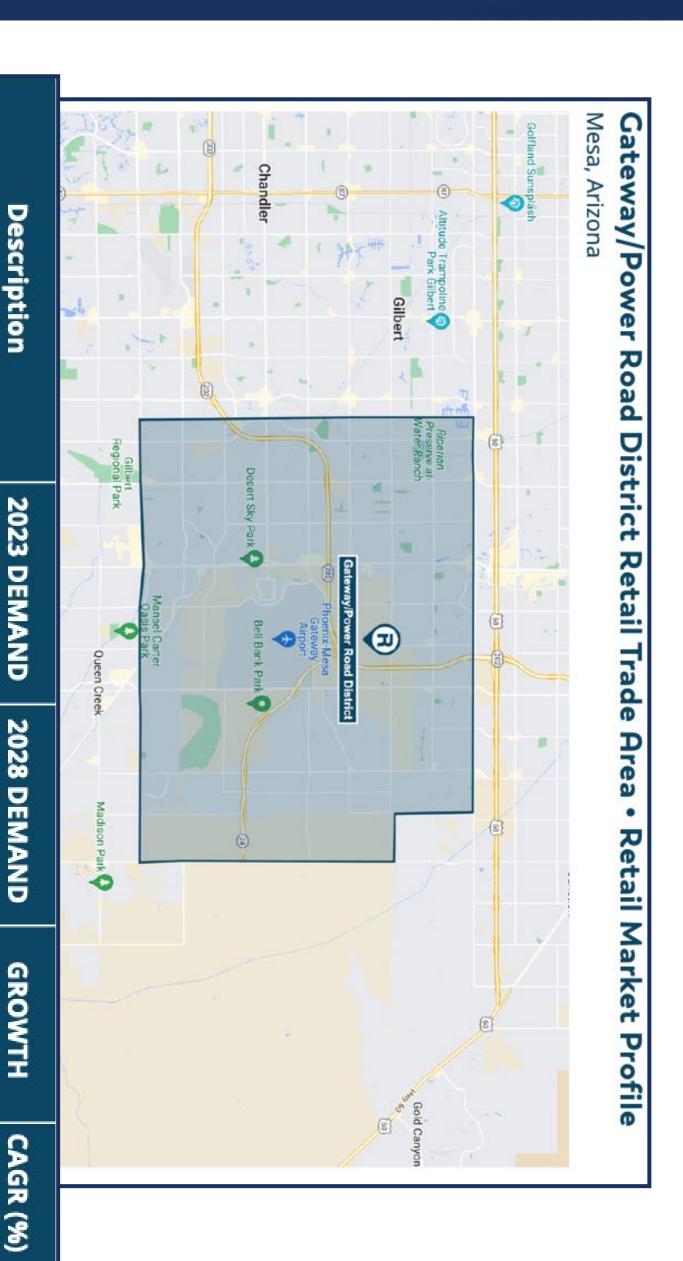
food and drinking places

\$2,346,481,451

\$2,997,032,774 \$650,551,323

5.02%

Total retail trade including

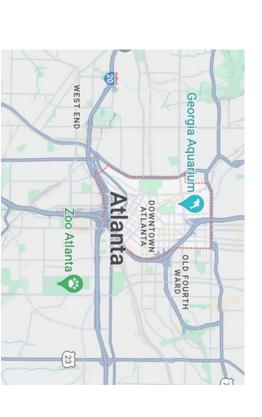


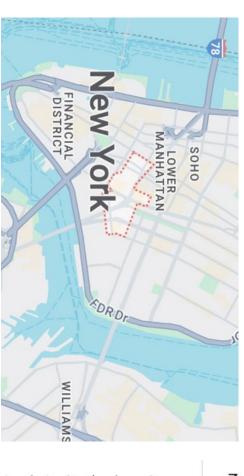


TAS

FINDINGS & RECOMMENDATIONS

Become a Google Maps Partner to **Define Certain Districts**





Chinatown

New York, NY

Sunny · 38°F 10:30 AM

Quick facts

spices. Locals hang out in leafy Columbus Park for Tai selling everything from fresh and dried fish to herbs and and hand-pulled noodles. The busy sidewalks are packed with souvenir stores, bubble tea shops, and markets Southeast Asian restaurants for dumplings, pork buns Chi, chess and mahjong. that draws foodies and tourists to its many Chinese and Vibrant Chinatown is a densely populated neighborhood

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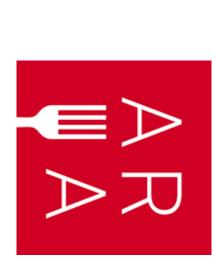












SUPERSTITION SPRINGS CENTER

m Z R S



HOSPITALITY



MESA RIVERVIEW

MANAGED BY AN AFFILIATE OF
REALTY





FINDINGS & RECOMMENDATIONS

TAS

Cultivate relationships with the leasing contact for the major shopping centers in Mesa. For example, Dana Park has lost retailers due to mismanagement and could use signage & website directories. Encouragement from OED's office through coordination assists with filling existing & future retail centers.



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The**Retail**Coach

Task 3: Plan Development



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The**Retail**Coach

Task 3: Retail & Developer Identification

Purple Penguin Snowcone Sha Pet Planet Pet Planet Smart Gym Pet Planet Ret Ret Ret Ret Ret Ret Ret	Purple Penguin Snowcone Sha Pet Planet All HQ (2)	Purple Penguin Snowcone Sha		Zesty Zzeeks	Puff & Fluff Grooming and Pet Retail Pet S	Green Valley Storage Ret (48) Ret	Sunburst Smoke Shop Ret Ret	Carmine's Pizza Kitchen Ret Ret	Inner Vision Yoga Retail Enter	Coffee Rush	Hawaiian Experience Spa Ret (18) He	Los Taquitos Retail Resta	Brand Contact Info Ca
	Retail Entertainment Venues	Retail Pet Supply & Services	Restaurants	Retail Restaurants	Retail Pet Supply & Services	Retail Mailing & Delivery Servic	Retail Restaurants	Retail Restaurants	Retail Entertainment Venues	Retail Restaurants	Retail Health & Personal Care	Retail Restaurants	Category
	3.00 (54)	4.43 (279)	4.37 (79)	4.00 (271)	4.29 (549)	2 4.27 (93)	☆ 4.00 (6)	<mark>∵</mark> 4.00 (940)	☆ 4.25 (67)	3.74 (863)	4.50 (607)	🔀 3.69 (2.39k)	Avg. Rating
	28.82 mi	6.38 mi	253.62 mi	7.26 mi	11.73 mi	255.52 mi	25.08 mi	257.4 mi	8.79 mi	3.99 mi	9.48 mi	9.93 mi	Nearest Location
	•	2k - 2.5k	,	1.7k - 3k	1	1	1	1	1	1	1	•	Avg Size(Sq Ft)
S	4	15	ω	ហ	o	ហ	ω	4	ω	ω	ω	Cī	US Locations
	_	15	,	CJ	o	,	ω		ω	ω	ω	IJ	State Locations
486	467	531	536	511	522	511	498	517	501	537	578	580	Brand Synerg) Match Score

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Task 3:

Retail & Developer Identification



















ILLEGAL* PETE'S





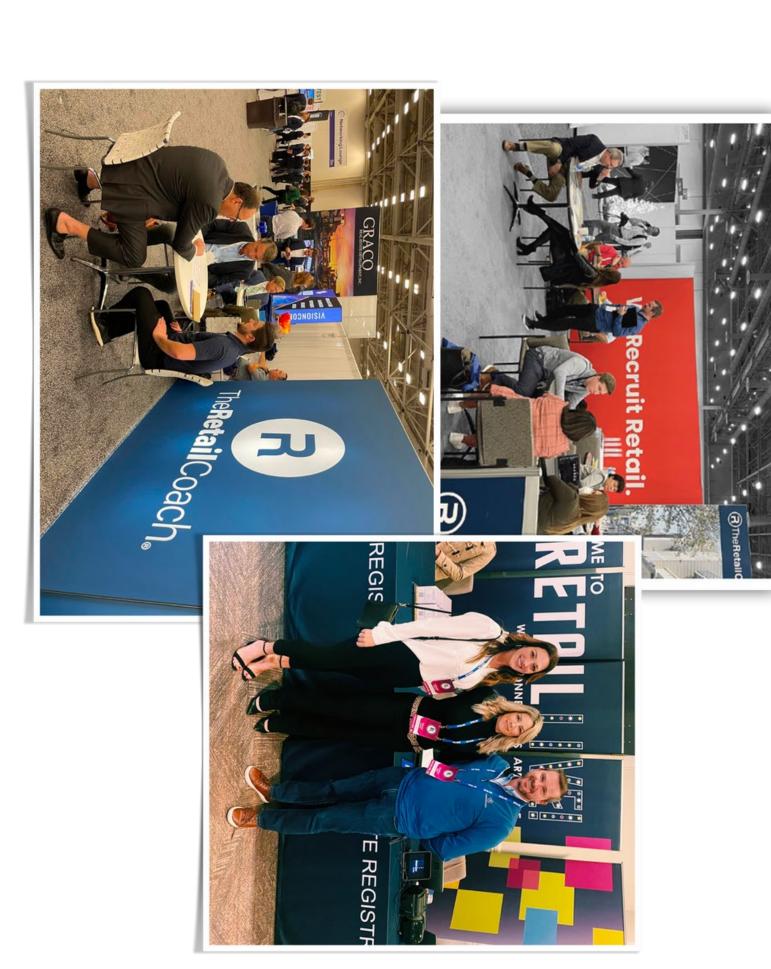


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The**Retail**Coach,

Task 4:
Marketing &
Ongoing
Outreach





Communities must be proactive in their recruitment efforts and trade shows provide excellent networking opportunities.

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The Retail Coach,

QUESTIONS?