



The**Retail**Coach.



QUALITY RETAIL ATTRACTION INITIATIVE

UPDATE

MESA, ARIZONA

FEBRUARY 2024

THERETAILCOACH.NET



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 Development

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

RFP

Issued 08/2023

Responses Received
10/2023

Consultant Engaged
11/15/2023

SCOPE OF WORK

TASK 1: RETAIL ANALYSIS

- Competing Community Analysis
- Existing Amenity Analysis
- Retail Trade Area Analysis
- Demographic Profiling
- Retail Demand Analysis

TASK 2: STAKEHOLDER ENGAGEMENT

- Public Stakeholders
- Private Stakeholders
- Why? Research & Feedback

TASK 3: PLAN DEVELOPMENT & RETAIL RECRUITMENT

- Plan Development
- Identifying Retailers & Developers for Recruitment
- Marketing & Implementation

TASK 4: MARKETING & ONGOING OUTREACH

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



Project Timeline

Execution of Agreement

Initial On The Ground Visit

Tasks 1-3 Completed Within 90 Days From First Visit

90 Days – Through Remainder of First Year



Kick-Off Meeting

Project kick-off call with key staff and stakeholders.

- Review timeline, goals, and objectives with project team
- Discuss priority sites and key areas of focus

Initial On The Ground Visit

On-the-ground visit by The Retail Coach Team Members

Tasks 1-3

Deliverables provided

Task 4

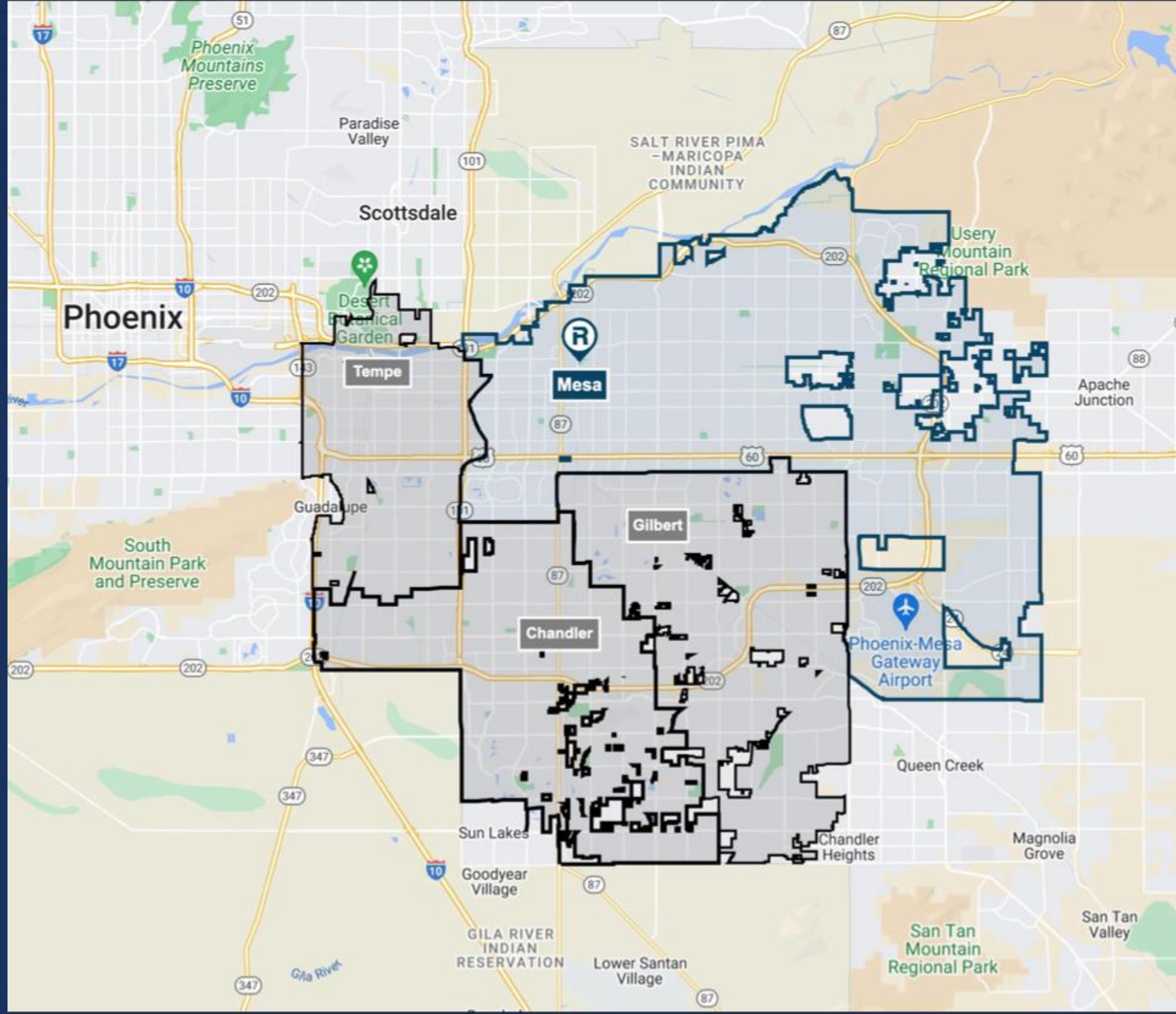
Strategy Implementation and Recruitment



Task 1: Retail Analysis

Understanding Mesa's Competing Communities

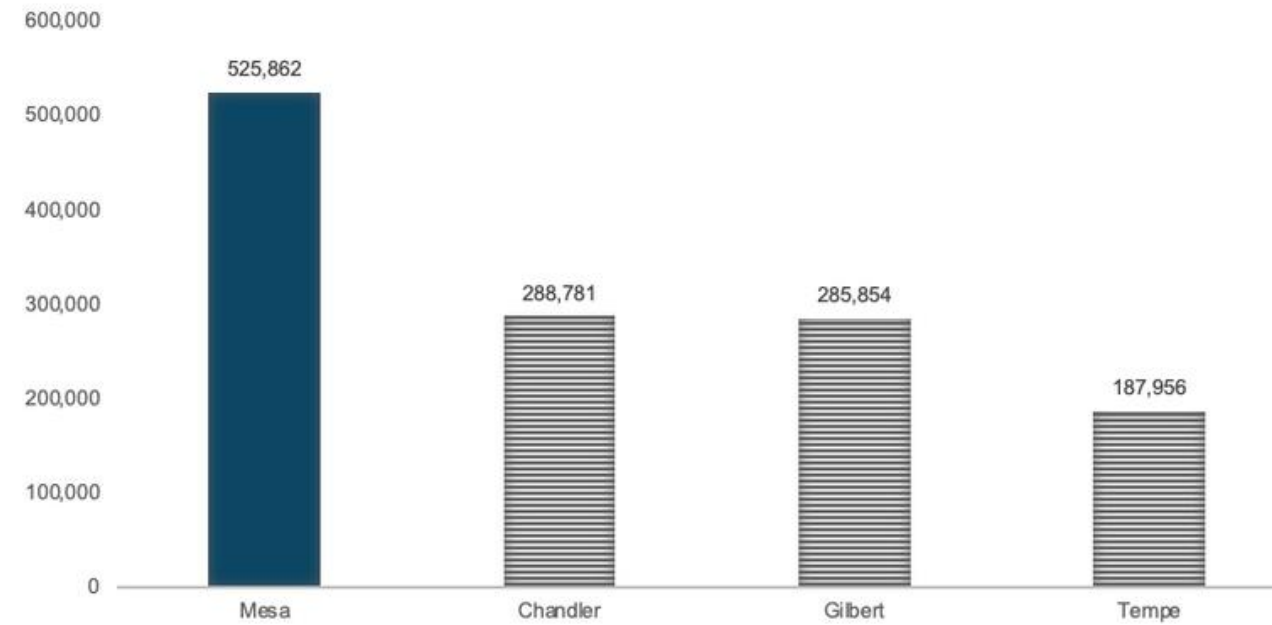
Why? When retailers look at Phoenix MSA for locations and growth, understanding the demographics of Mesa's competing communities and how those numbers drive retail matters.



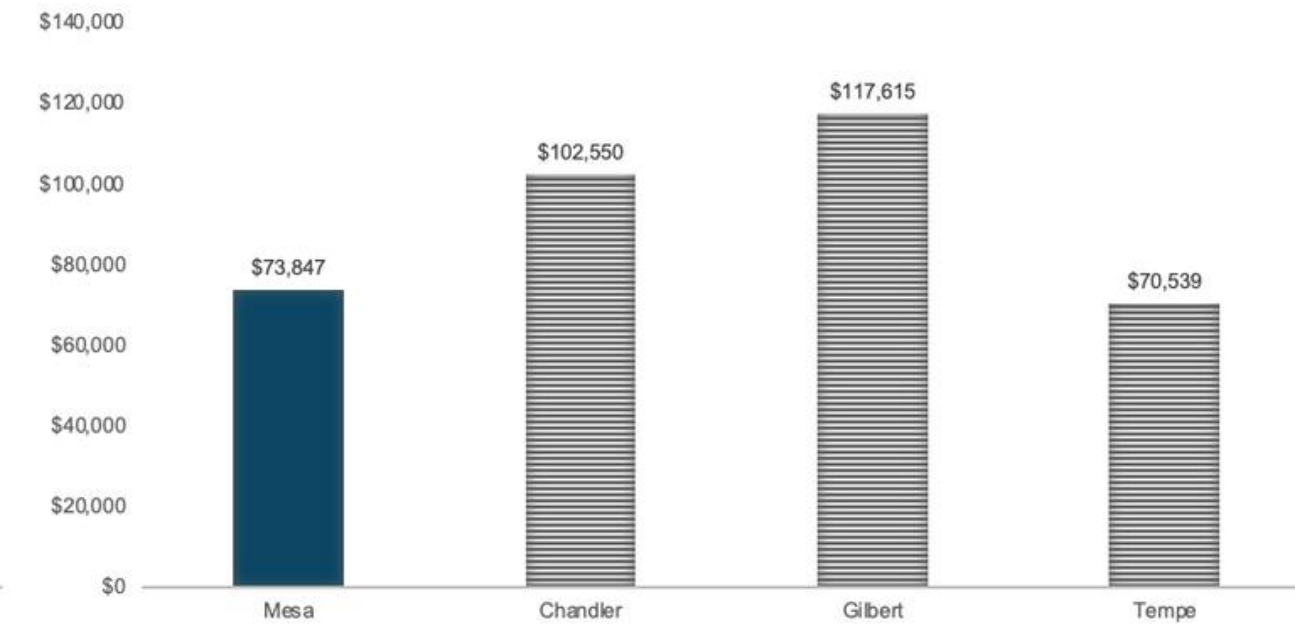
Task 1: Retail Analysis

Understanding Mesa's Competing Communities

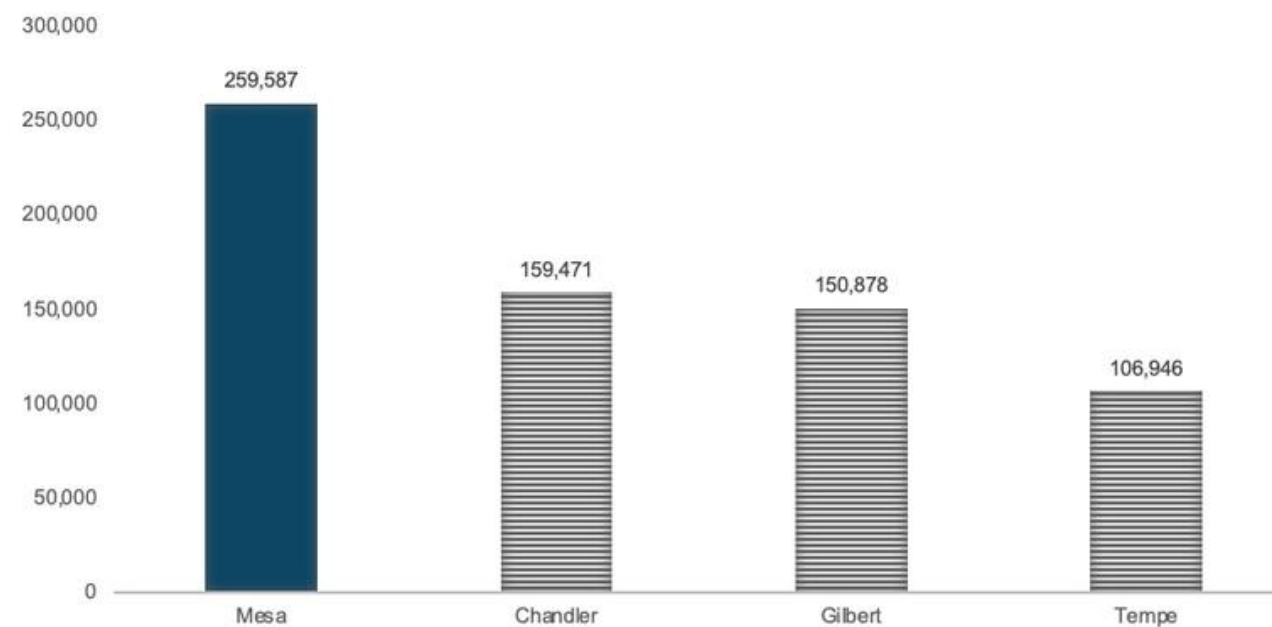
PEER COMMUNITY 2024 ESTIMATED POPULATION



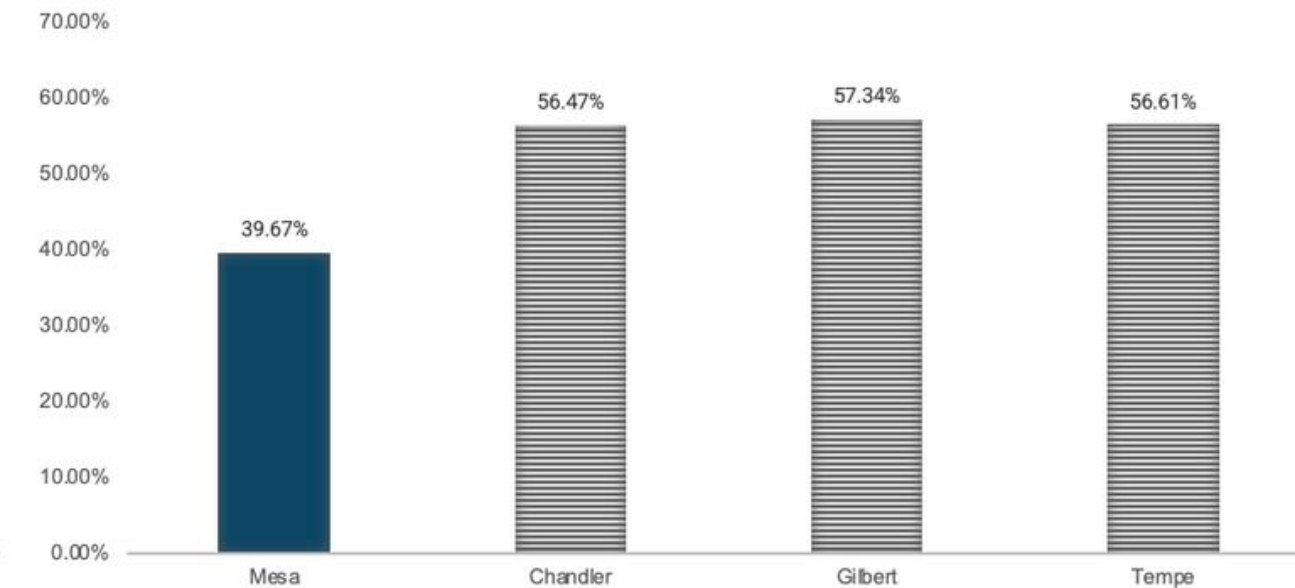
PEER COMMUNITY 2024 MEDIAN HOUSEHOLD INCOME



PEER COMMUNITY 2024 TOTAL EMPLOYMENT



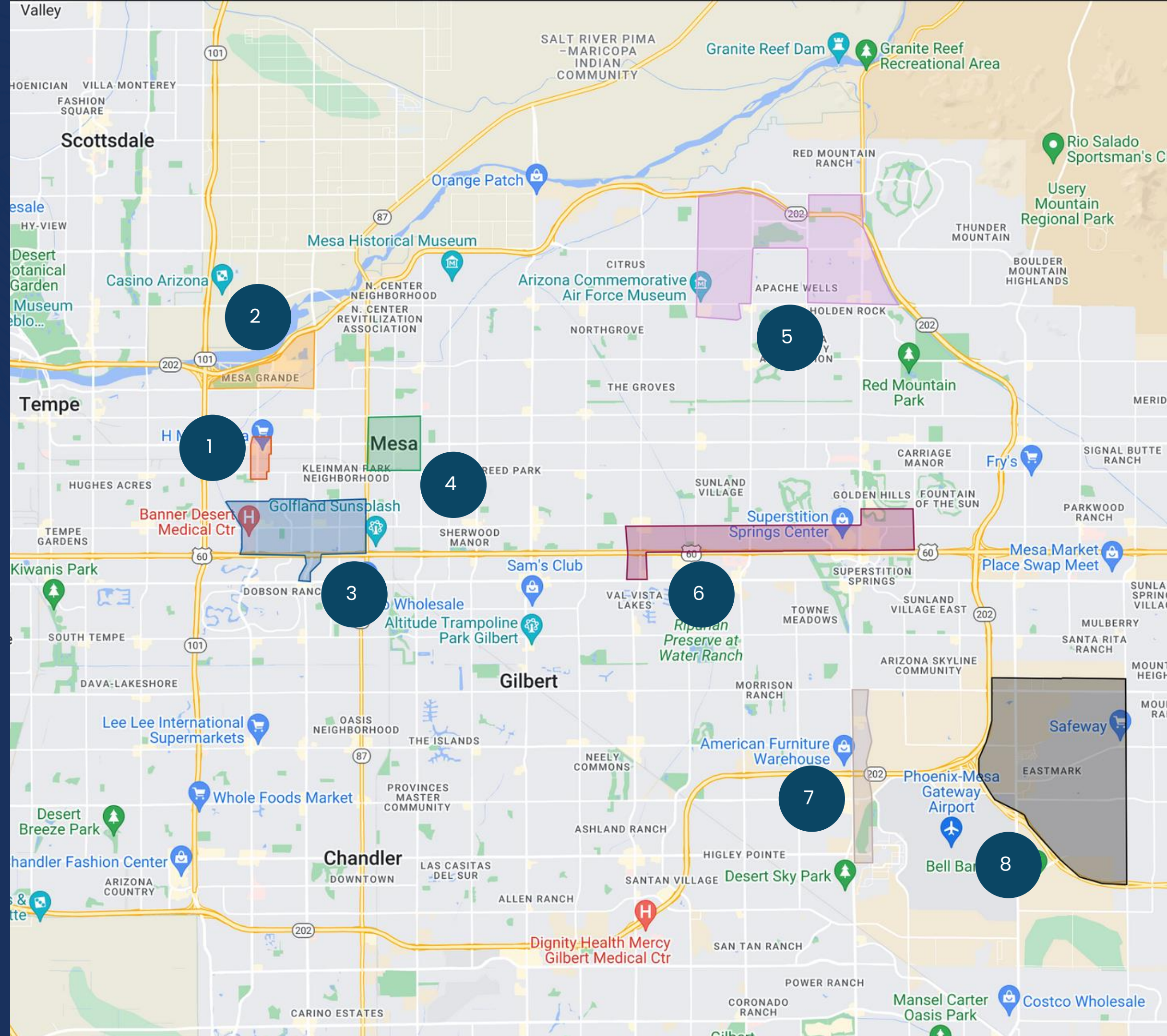
PEER COMMUNITY 2024 ASSOCIATES DEGREE OR HIGHER (AGE 25+)



Task 1: Retail Analysis

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

1. Asian District
2. Riverview
3. Fiesta
4. Downtown
5. Northeast Mesa
6. Superstition Springs
7. Power Road Corridor
8. Gateway



Task 1: Retail Analysis

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

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

Mobile Location Data & Retail Trade Area Mapping



Collection of Consumer Mobile Device Data

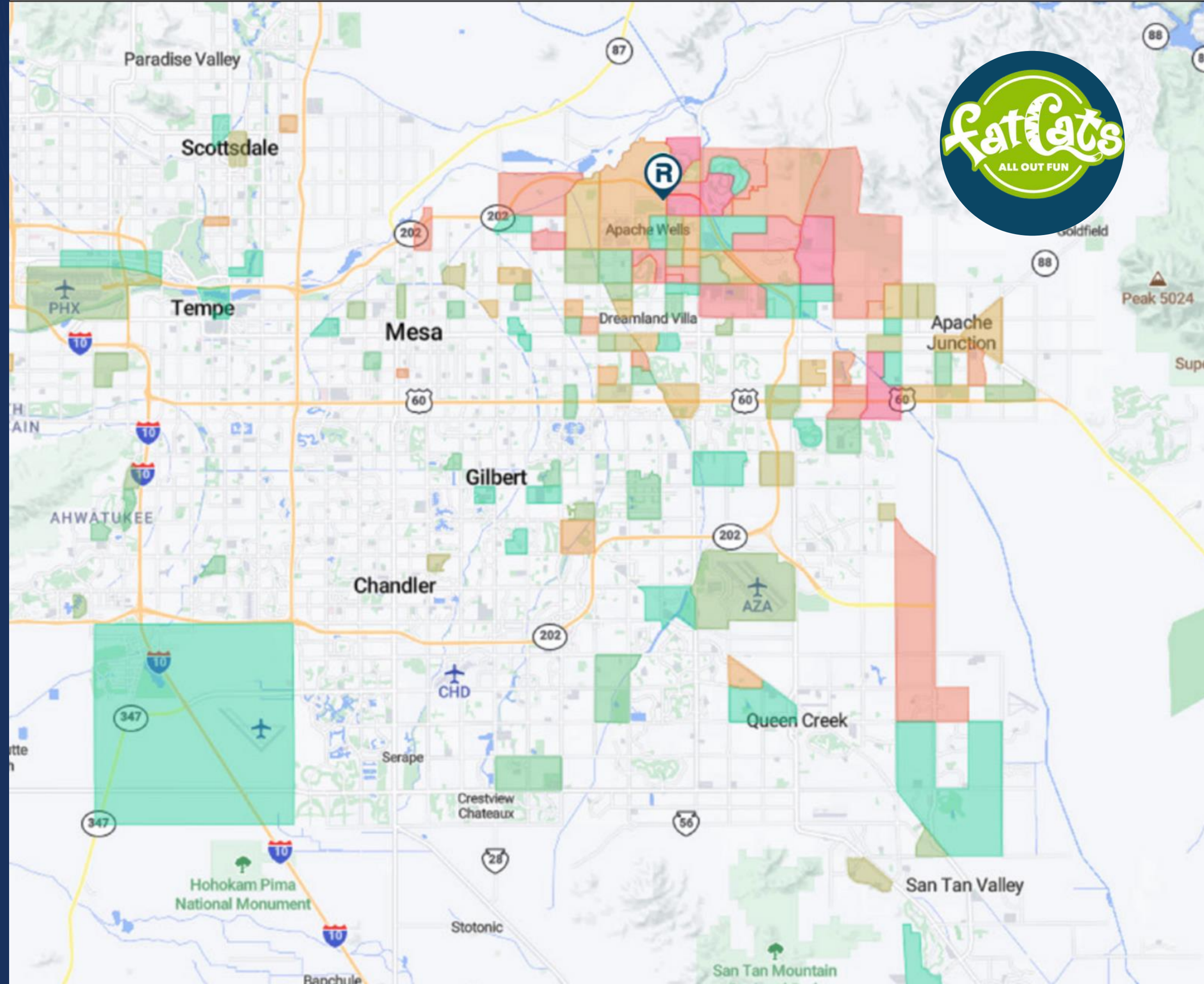
- High-confidence technology
- Geo-codes telephone calls, emails & texts
- Pinpoints consumer evening locations
- Determines consumer path-to-purchase



Task 1: Retail Analysis

Cell Phone Analysis Heatmap

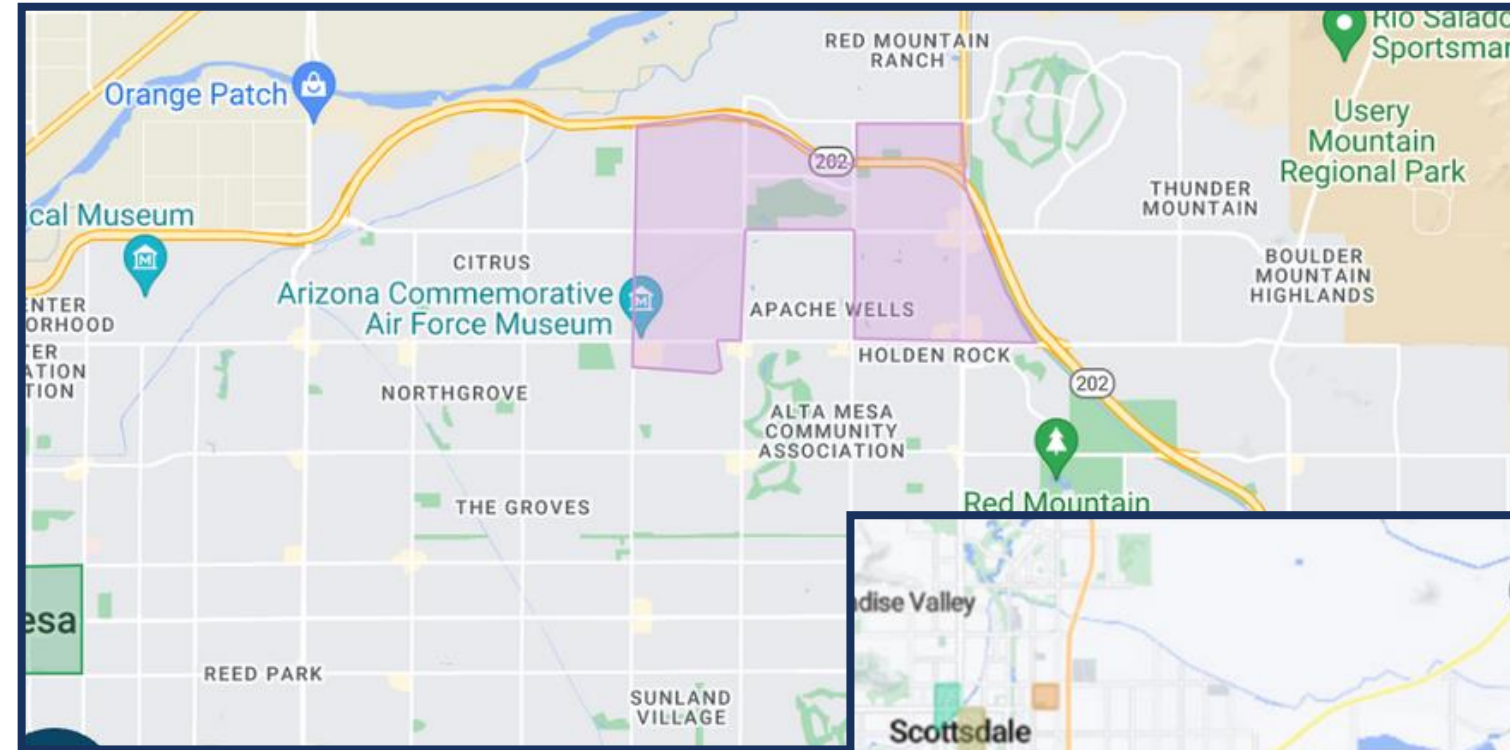
Northeast Mesa Submarket
Fat Cats Study



Task 1: Retail Analysis

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

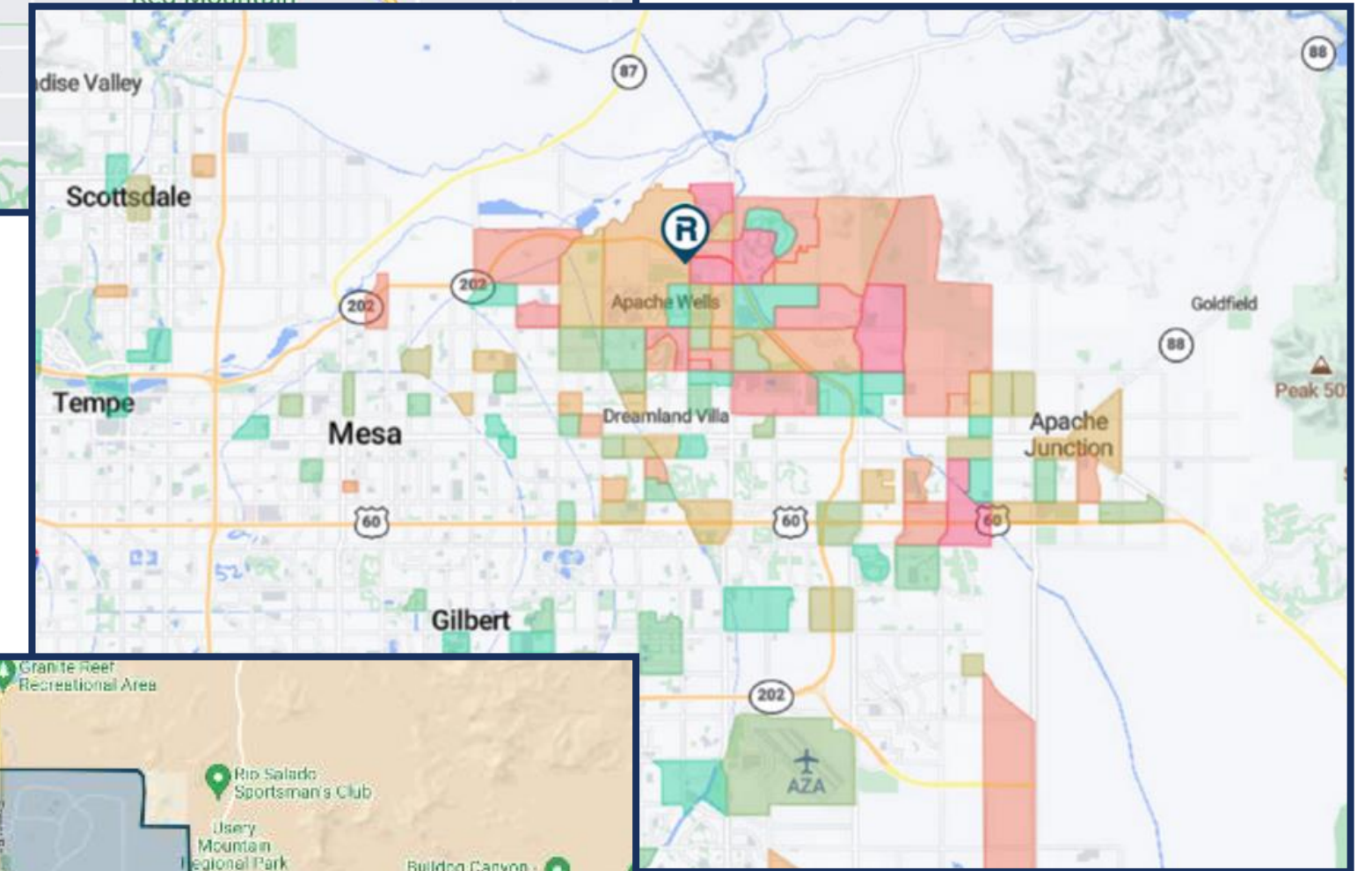
The retail trade area is the foundation of the strategy, and its accuracy is critical.



District Boundary Map



Cell Phone Analysis Heat Map



NE Mesa Retail Trade Area

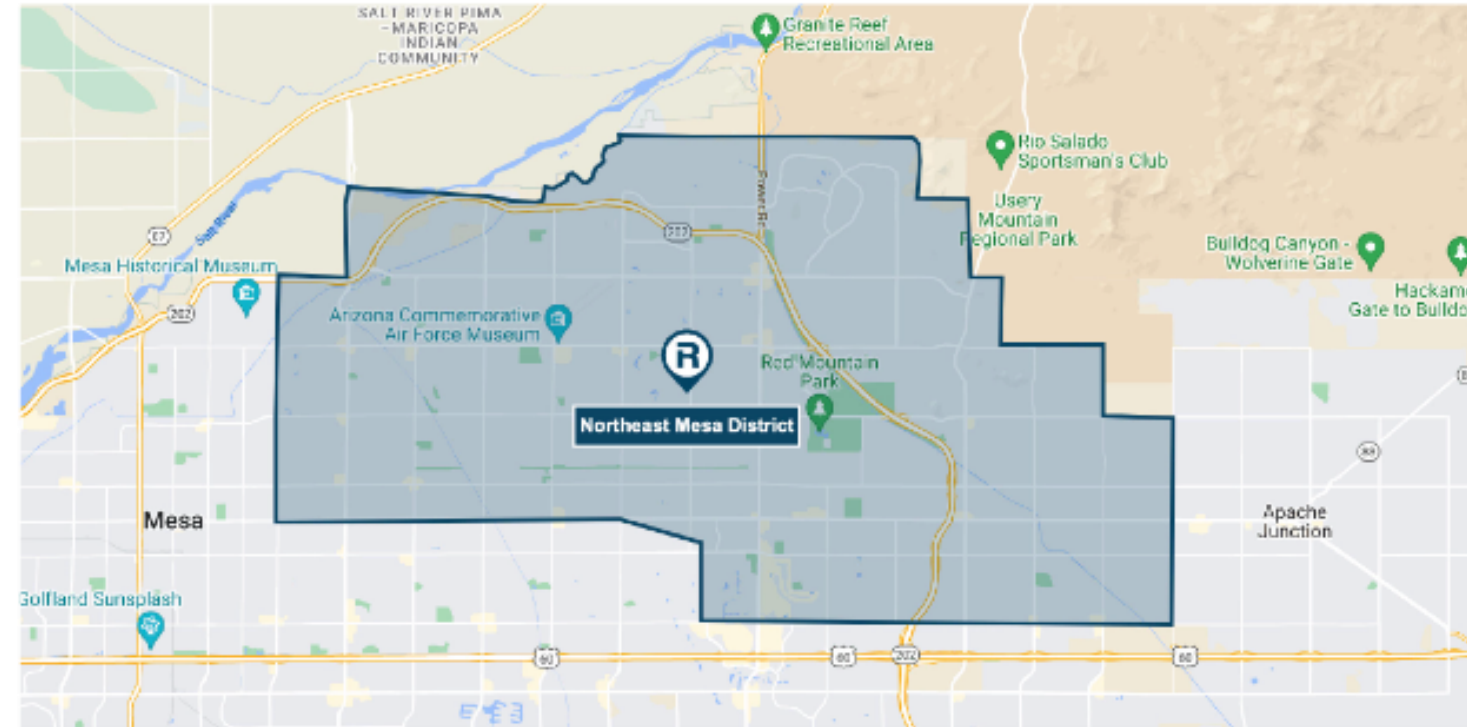


Task 1: Retail Analysis

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

Northeast Mesa District Retail Trade Area • Retail Market Profile

Mesa, Arizona



Population		Age	
2020	209,704	0 - 9 Years	10.44%
2024	215,999	10 - 17 Years	9.33%
2029	220,149	18 - 24 Years	7.99%
Educational Attainment (%)		25 - 34 Years	10.73%
Graduate or Professional Degree	10.30%	35 - 44 Years	10.95%
Bachelors Degree	19.98%	45 - 54 Years	10.88%
Associate Degree	9.85%	55 - 64 Years	13.56%
Some College	26.94%	65 and Older	26.13%
High School Graduate (or GED)	24.96%	Median Age	45.53
Some High School, No Degree	5.42%	Average Age	44.50
Less than 9th Grade	2.54%	Race Distribution (%)	
Income		White	73.81%
Average HH	\$108,177	Black/African American	2.83%
Median HH	\$78,063	American Indian/Alaskan	1.68%
Per Capita	\$43,485	Asian	2.02%
		Native Hawaiian/Islander	0.29%
		Other Race	8.20%
		Two or More Races	11.17%
		Hispanic	20.67%

The information contained herein was obtained from sources believed to be reliable, however, The Retail Coach, LLC makes no guarantees, warranties or representations as to the completeness or accuracy thereof. The presentation of this property is submitted subject to errors, omissions, changes of price or conditions, prior sale or lease or withdrawn without notice.



ECONOMIC DEVELOPMENT

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Task 1: Retail Analysis

Retail Trade Area: Demographic Snapshot

Trade Area	2024 Population	Associates Degree or Higher Education (Age 25+)	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



Task 1: Retail Analysis

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

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

Mesa, Arizona

NAICS	DESCRIPTION	2023 DEMAND	2028 DEMAND	GROWTH	CAGR (%)*
44, 45, 722	Total retail trade including food and drinking places	\$2,346,481,451	\$2,997,032,774	\$650,551,323	5.02%
441	Motor vehicle and parts dealers	\$452,915,769	\$600,319,369	\$147,403,600	5.80%
4411	Automobile dealers	\$401,099,999	\$531,791,515	\$130,691,516	5.80%
4412	Other motor vehicle dealers	\$22,915,997	\$33,174,501	\$10,258,504	7.68%
4413	Automotive parts, accessories, and tire stores	\$28,899,772	\$35,353,352	\$6,453,580	4.11%
442	Furniture and home furnishings stores	\$26,440,900	\$35,120,865	\$8,679,965	5.84%
4421	Furniture stores	\$17,149,012	\$23,030,628	\$5,881,616	6.08%
4422	Home furnishings stores	\$9,291,888	\$12,090,238	\$2,798,350	5.41%
443	Electronics and appliance stores	\$38,330,141	\$47,475,138	\$9,144,997	4.37%
443141	Household appliance stores	\$7,554,959	\$9,325,925	\$1,770,967	4.30%
443142	Electronics stores	\$30,775,182	\$38,149,213	\$7,374,031	4.39%
444	Building material and garden equipment and supplies dealers	\$146,047,109	\$186,318,122	\$40,271,014	4.99%
4441	Building material and supplies dealers	\$128,172,372	\$163,427,089	\$35,254,716	4.98%
44411	Home centers	\$71,976,400	\$91,611,599	\$19,635,199	4.94%
44412	Paint and wallpaper stores	\$4,963,622	\$7,717,968	\$2,754,346	9.23%
44413	Hardware stores	\$10,683,219	\$13,534,608	\$2,851,389	4.85%
44419	Other building material dealers	\$40,549,131	\$50,562,914	\$10,013,783	4.51%
4442	Lawn and garden equipment and supplies stores	\$17,874,737	\$22,891,034	\$5,016,297	5.07%
44421	Outdoor power equipment stores	\$3,358,316	\$4,346,871	\$988,555	5.30%
44422	Nursery, garden center, and farm supply stores	\$14,516,421	\$18,544,163	\$4,027,742	5.02%
445	Food and beverage stores	\$359,685,606	\$455,663,733	\$95,978,127	4.84%
4451	Grocery stores	\$325,600,596	\$412,188,823	\$86,588,227	4.83%
44511	Supermarkets and other grocery (except convenience) stores	\$312,294,576	\$395,586,948	\$83,292,372	4.84%
44512	Convenience stores	\$13,306,021	\$16,601,875	\$3,295,855	4.53%
4452	Specialty food stores	\$9,970,548	\$12,644,831	\$2,674,284	4.87%
4453	Beer, wine, and liquor stores	\$24,114,462	\$30,830,079	\$6,715,617	5.04%
446	Health and personal care stores	\$62,048,058	\$78,584,802	\$16,536,744	4.84%
44611	Pharmacies and drug stores	\$46,890,590	\$59,292,558	\$12,401,968	4.81%
44612	Cosmetics, beauty supplies, and perfume stores	\$3,093,930	\$3,919,832	\$825,902	4.85%
44613	Optical goods stores	\$9,450,245	\$12,040,529	\$2,590,284	4.96%
44619	Other health and personal care stores	\$2,613,293	\$3,331,884	\$718,591	4.98%
447	Gasoline stations	\$222,862,940	\$290,693,536	\$67,830,596	5.46%
448	Clothing and clothing accessories stores	\$79,245,329	\$92,575,427	\$13,330,098	3.16%
4481	Clothing stores	\$51,842,317	\$58,871,892	\$7,029,575	2.58%
44811	Men's clothing stores	\$1,552,277	\$1,745,144	\$192,867	2.37%
44812	Women's clothing stores	\$8,347,199	\$9,526,767	\$1,179,568	2.68%
44813	Children's and infants' clothing stores	\$5,341,823	\$5,648,355	\$306,531	1.12%
44814	Family clothing stores	\$30,572,524	\$35,232,476	\$4,659,952	2.88%
44815	Clothing accessories stores	\$2,115,041	\$2,402,760	\$287,718	2.58%
44819	Other clothing stores	\$3,913,453	\$4,316,391	\$402,938	1.98%
4482	Shoe stores	\$12,071,513	\$15,509,581	\$3,438,068	5.14%
4483	Jewelry, luggage, and leather goods stores	\$15,331,499	\$18,193,954	\$2,862,455	3.48%
44831	Jewelry stores	\$10,523,724	\$12,558,971	\$2,035,247	3.60%
44832	Luggage and leather goods stores	\$4,807,775	\$5,634,983	\$827,208	3.23%

Task 1: Retail Analysis

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

Downtown District Retail Trade 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%

Task 1: Retail Analysis

Demographic & Growth
Comparisons By Submarket

Retail Trade Area: Demographic Snapshot

Trade Area	2024 Population	Associates Degree or Higher Education (Age 25+)	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

Retail Trade Area: Retail Demand Outlook Snapshot

Trade Area	2023 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

Task 1: Retail Analysis

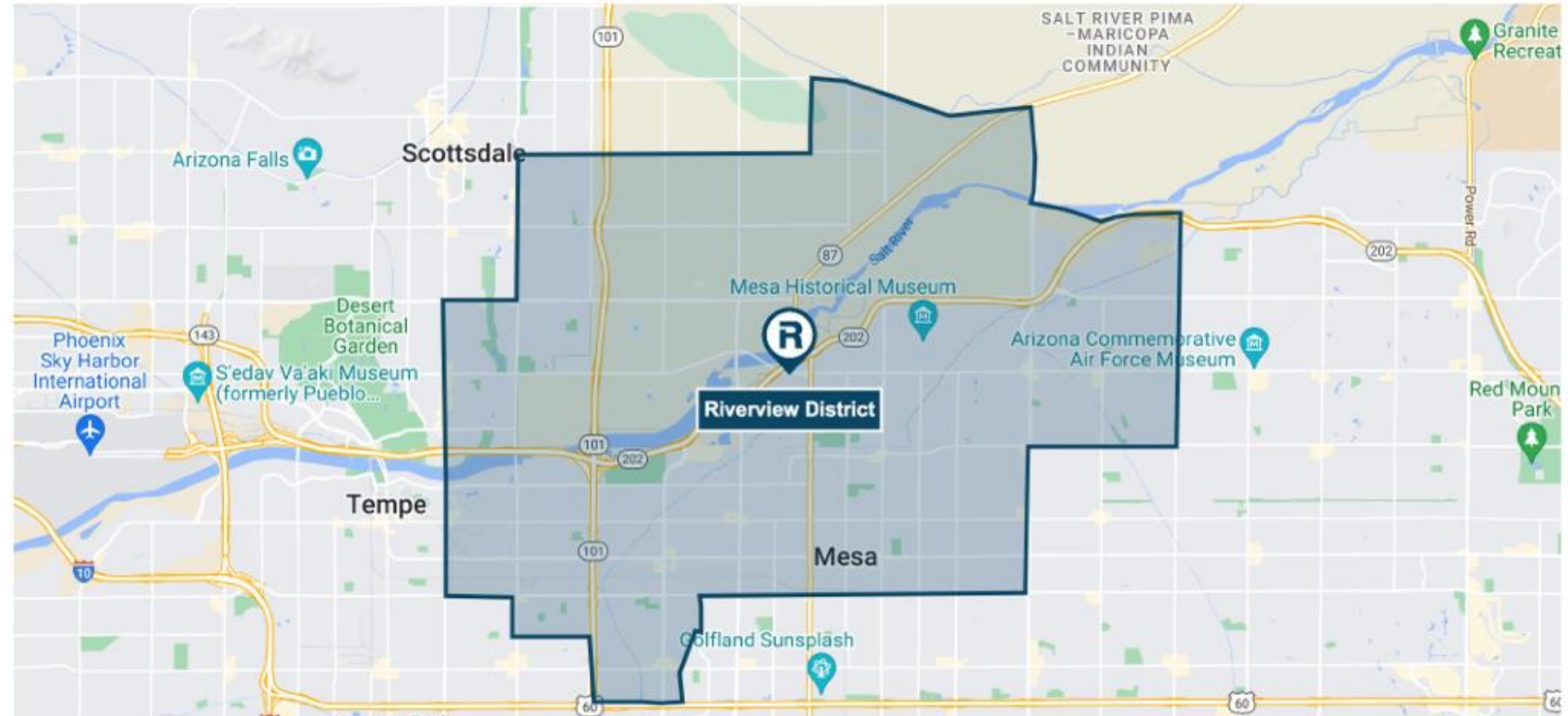
Demographic & Growth Comparisons By Submarket

Population

2020	199,964
2024	206,603
2029	211,290

Riverview District Retail Trade Area • Retail Market Profile

Mesa, Arizona



Description	2023 DEMAND	2028 DEMAND	GROWTH	CAGR (%)
Total retail trade including food and drinking places	\$1,977,913,742	\$2,324,620,732	\$346,706,990	3.28%

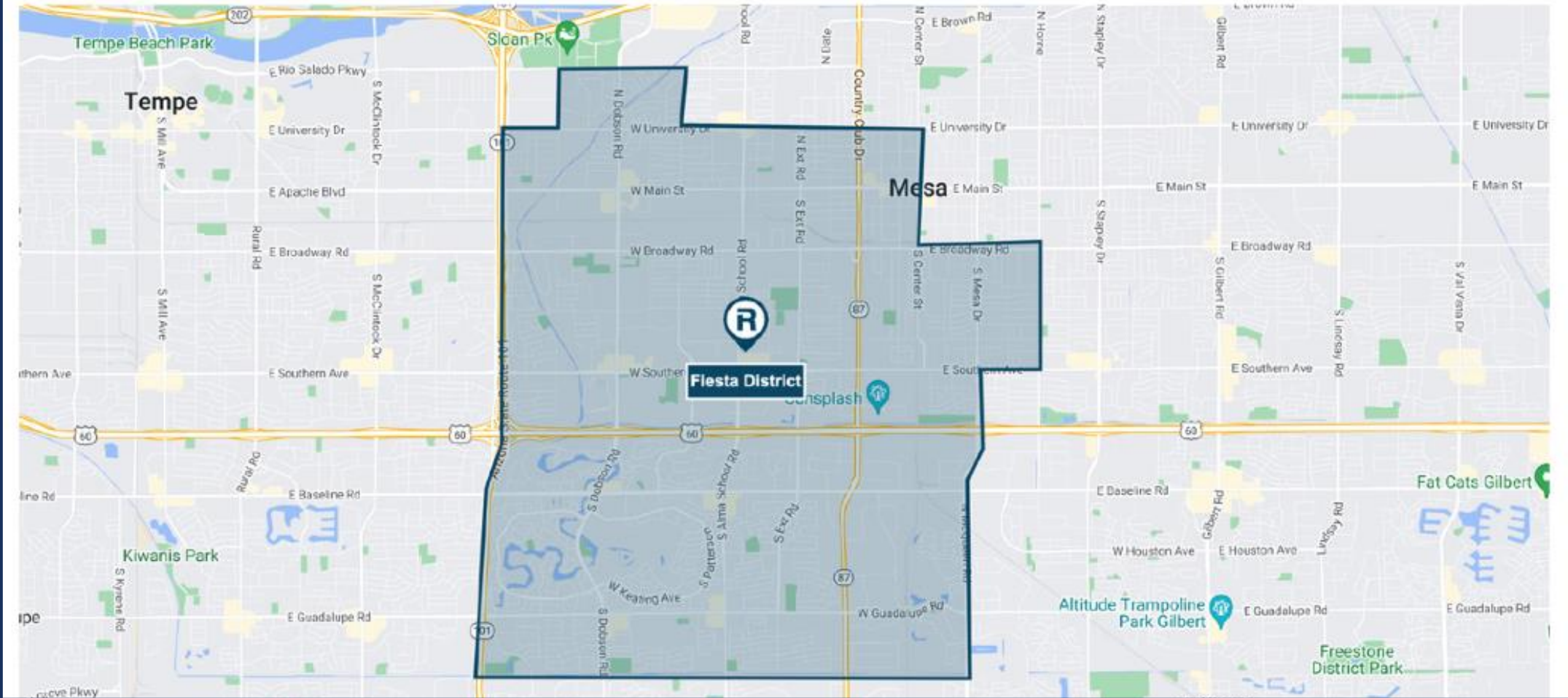
Electronics and appliance stores	\$32,395,141	\$37,957,661	\$5,562,520	3.22%
Building material and garden equipment and supplies dealers	\$119,519,829	\$147,449,563	\$27,929,734	4.29%
Food and beverage stores	\$302,536,754	\$355,698,836	\$53,162,082	3.29%
Health and personal care stores	\$50,968,977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

Task 1: Retail Analysis

Demographic & Growth Comparisons By Submarket

Fiesta District Retail Trade Area • Retail Market Profile

Mesa, Arizona



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

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%

Population

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

Task 1: Retail Analysis

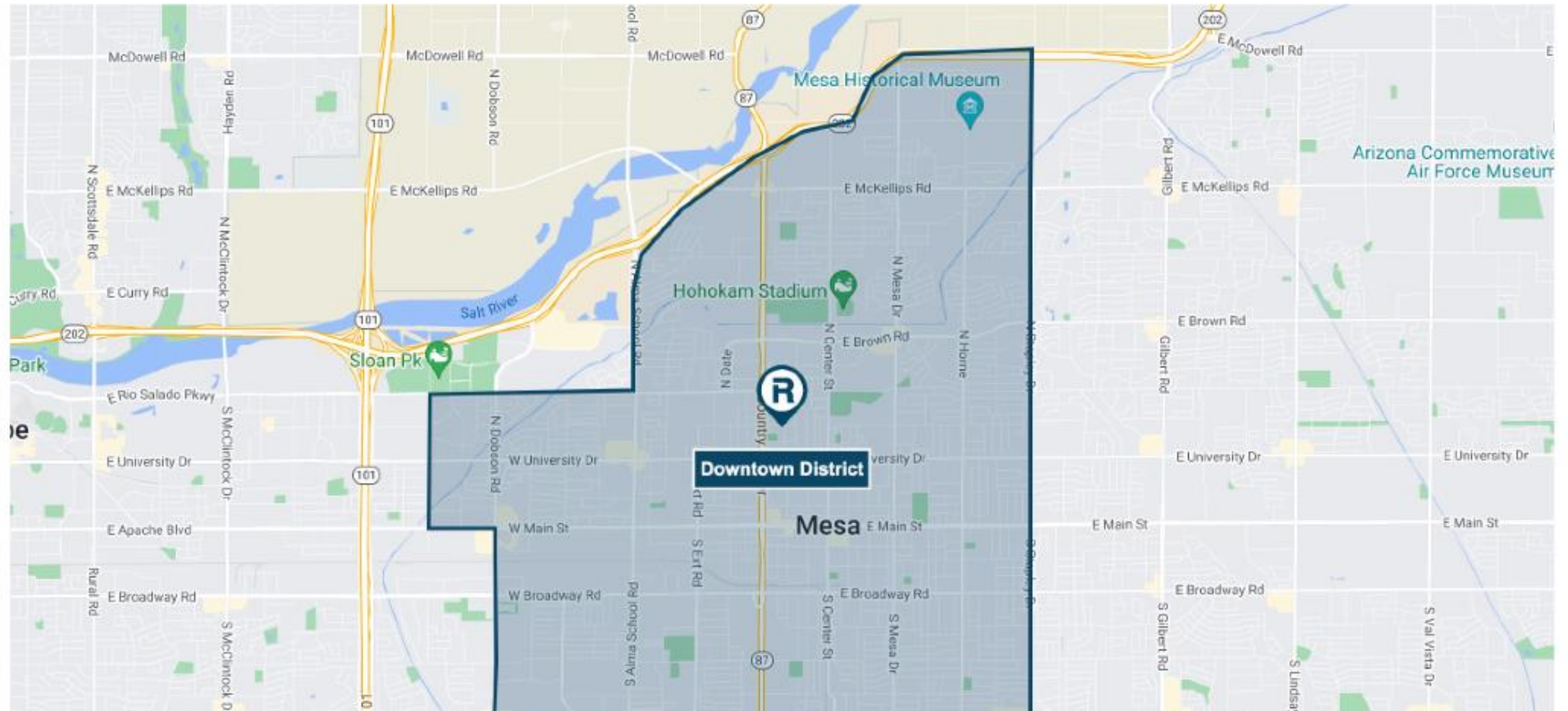
Demographic & Growth Comparisons By Submarket

Population

2020	115,673
2024	118,384
2029	119,899

Downtown District Retail Trade Area • Retail Market Profile

Mesa, Arizona



Description	2023 DEMAND	2028 DEMAND	GROWTH	CAGR (%)
Total retail trade including food and drinking places	\$977,474,298	\$1,128,588,004	\$151,113,706	2.92%

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

Task 1: Retail Analysis

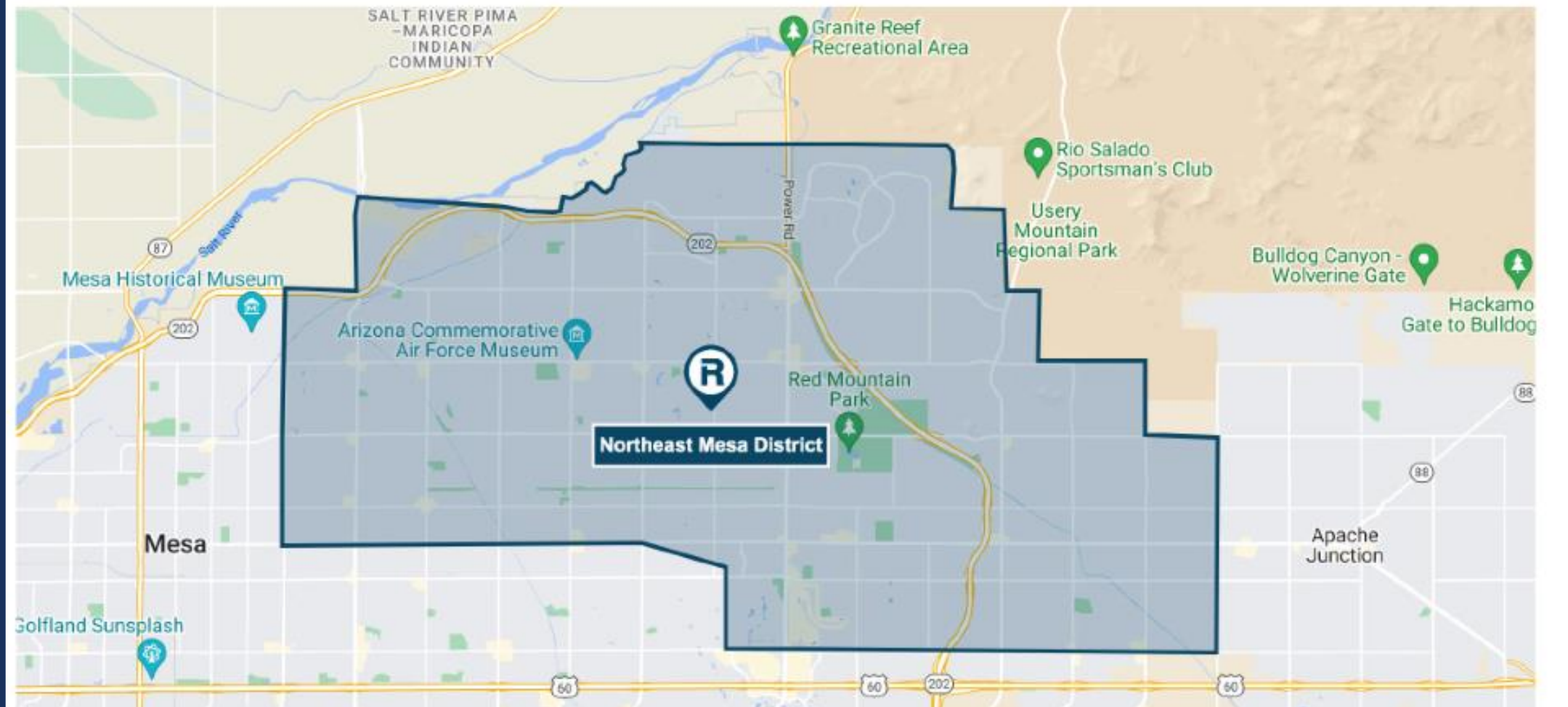
Demographic & Growth
Comparisons By Submarket

Population

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

Northeast Mesa District Retail Trade Area • Retail Market Profile

Mesa, Arizona



Description	2023 DEMAND	2028 DEMAND	GROWTH	CAGR (%)
Total retail trade including food and drinking places	\$2,490,601,810	\$2,914,682,581	\$424,080,771	3.19%

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

Task 1: Retail Analysis

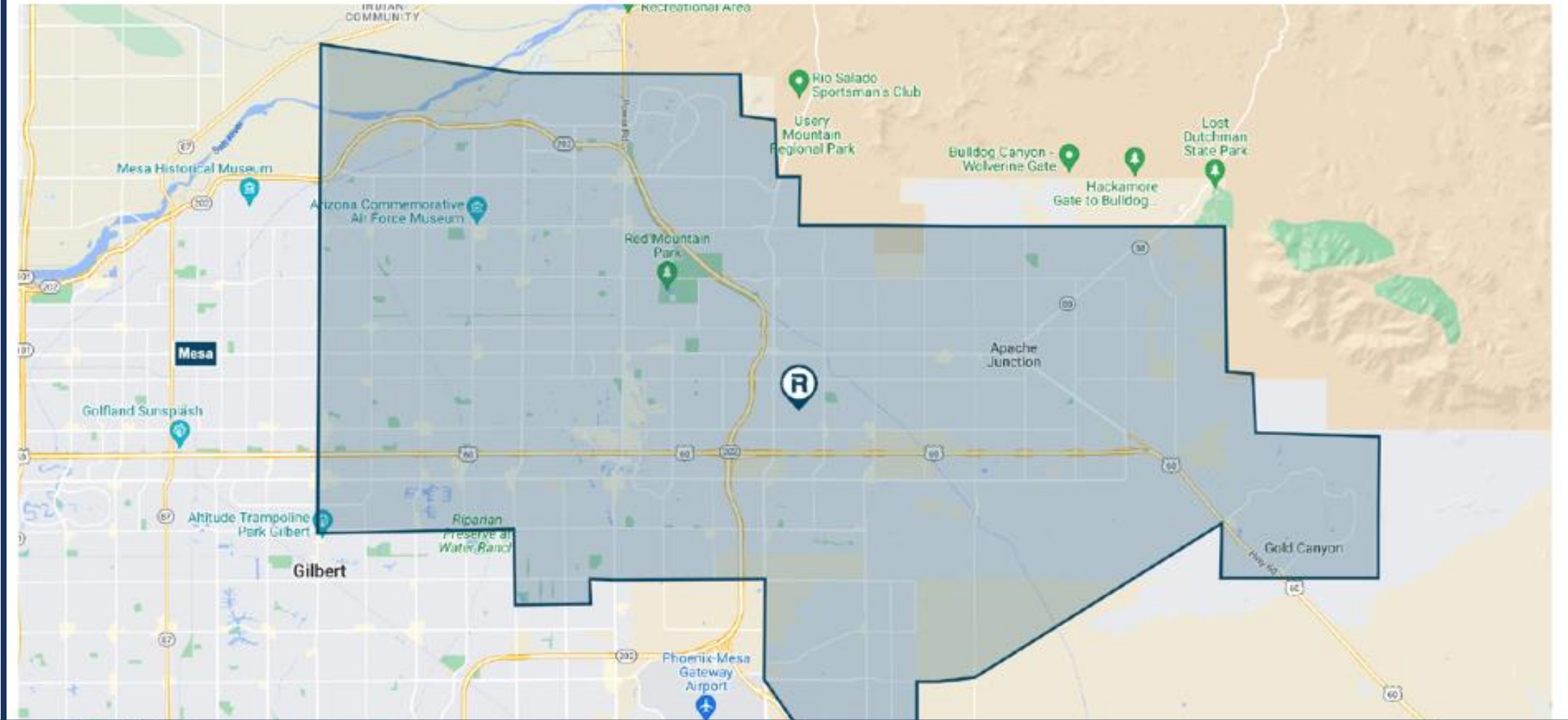
Demographic & Growth
Comparisons By Submarket

Population

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

Superstition Springs District Retail Trade Area • Retail Market Profile

Mesa, Arizona



Description	2023 DEMAND	2028 DEMAND	GROWTH	CAGR (%)
Total retail trade including food and drinking places	\$5,210,767,627	\$6,179,257,242	\$968,489,615	3.47%

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

Task 1: Retail Analysis

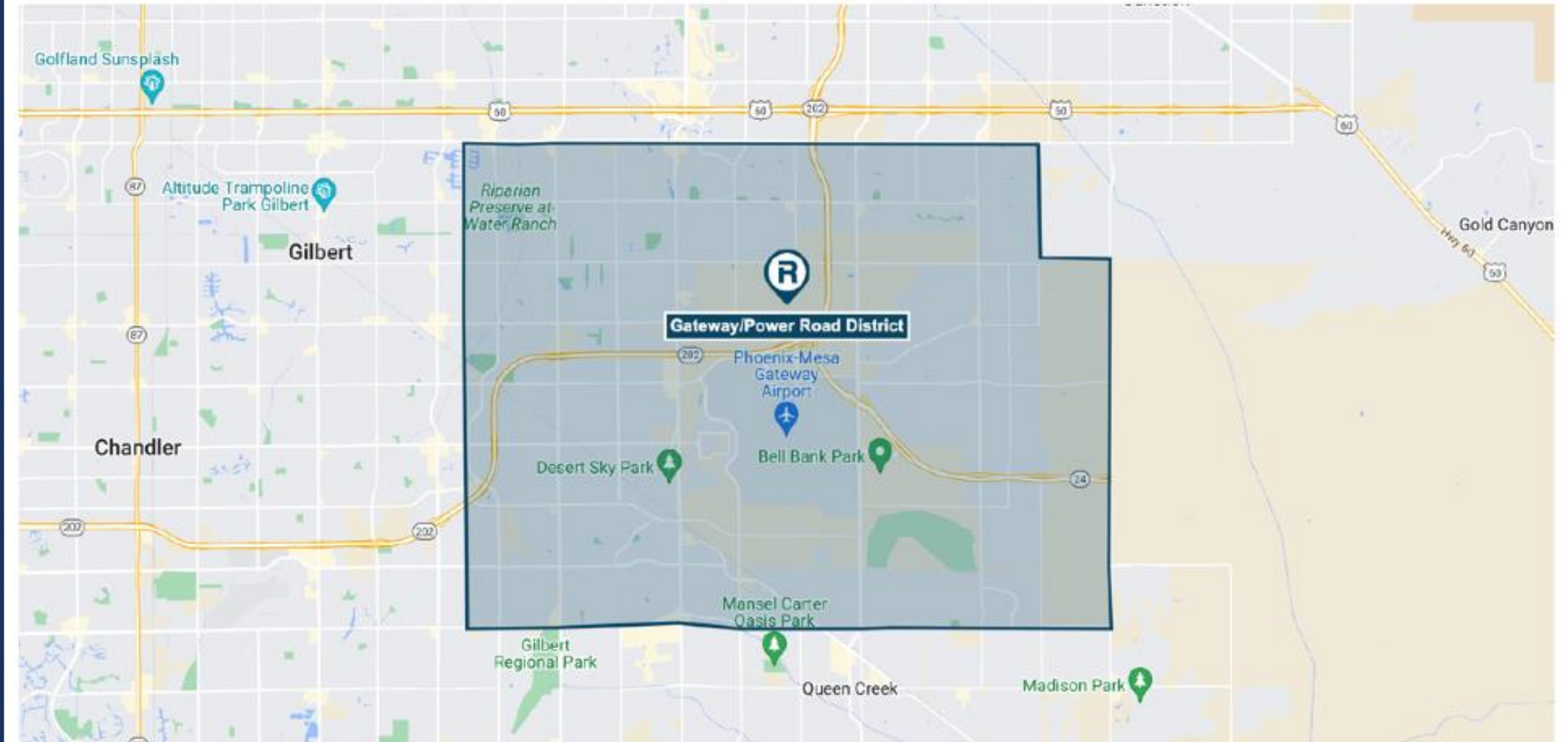
Demographic & Growth Comparisons By Submarket

Population

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

Gateway/Power Road District Retail Trade Area • Retail Market Profile

Mesa, Arizona

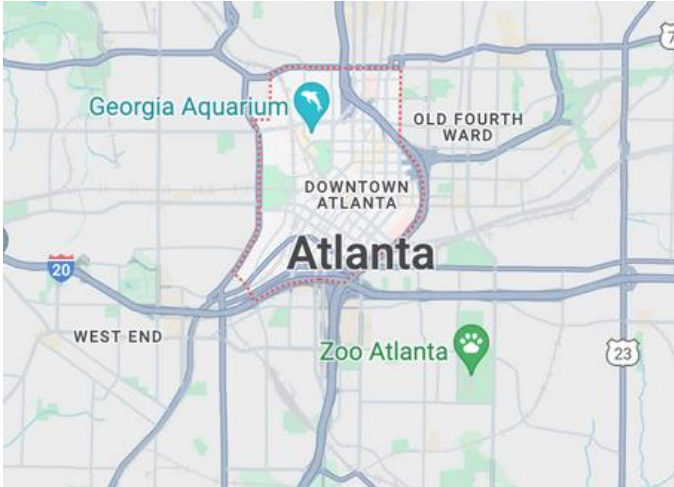


Description	2023 DEMAND	2028 DEMAND	GROWTH	CAGR (%)
Total retail trade including food and drinking places	\$2,346,481,451	\$2,997,032,774	\$650,551,323	5.02%

Food services and drinking places	\$256,474,035	\$331,189,872	\$74,715,836	5.25%
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TASK 1: FINDINGS & RECOMMENDATIONS

- Become a Google Maps Partner to Define Certain Districts



Chinatown
New York, NY

Sunny · 38°F
10:30 AM

Quick facts

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





Task 2: Stakeholder Engagement



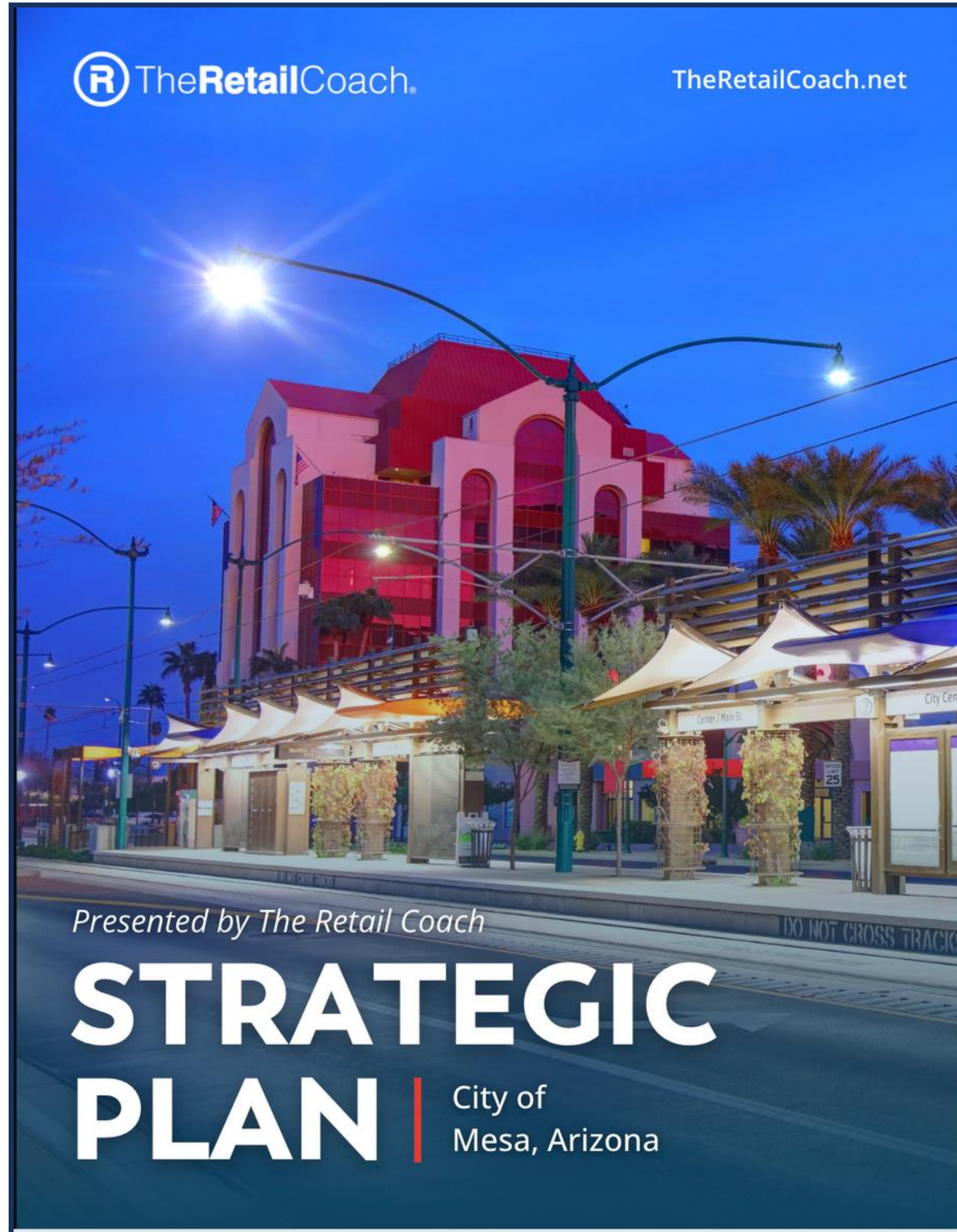
TASK 2:

FINDINGS & RECOMMENDATIONS

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



Task 3: Plan Development





Task 3: Retail & Developer Identification

Brand	Contact Info	Category	Avg. Rating	Nearest Location	Avg Size(Sq Ft)	US Locations	State Locations	Brand Synergy Match Score
Los Taquitos	HQ (20)	Retail Restaurants	★ 3.69 (2.39k)	9.93 mi	-	5	5	580
Hawaiian Experience Spa	HQ (18)	Retail Health & Personal Care	★ 4.50 (607)	9.48 mi	-	3	3	578
Coffee Rush	HQ (5)	Retail Restaurants	★ 3.74 (863)	3.99 mi	-	3	3	537
Inner Vision Yoga	HQ (4)	Retail Entertainment Venues	★ 4.25 (67)	8.79 mi	-	3	3	501
Carmine's Pizza Kitchen	HQ (16)	Retail Restaurants	★ 4.00 (940)	257.4 mi	-	4	-	517
Sunburst Smoke Shop	HQ (7)	Retail Restaurants	★ 4.00 (6)	25.08 mi	-	3	3	498
Green Valley Storage	HQ (48)	Retail Mailing & Delivery Service	★ 4.27 (93)	255.52 mi	-	5	-	511
Puff & Fluff Grooming and Pet	HQ (23)	Retail Pet Supply & Services	★ 4.29 (549)	11.73 mi	-	6	6	522
Zesty ZEEKS	HQ (0)	Retail Restaurants	★ 4.00 (271)	7.26 mi	1.7k - 3k	5	5	511
Purple Penguin Snowcone Sha	HQ (2)	Retail Restaurants	★ 4.37 (79)	253.62 mi	-	3	-	536
Pet Planet	HQ (3)	Retail Pet Supply & Services	★ 4.43 (279)	6.38 mi	2k - 2.5k	15	15	531
Smart Gym	HQ (6)	Retail Entertainment Venues	★ 3.00 (54)	28.82 mi	-	4	1	467
Marieta's	HQ (23)	Retail Restaurants	★ 3.40 (794)	299.86 mi	-	3	-	486

Task 3: Retail & Developer Identification

BLUE
sushi sake grill

ApricotLane.
BOUTIQUE


CULINARY DROPOUT

 **CINERGY**
ENTERTAINMENT

NORTH
ITALIA

 **NATURAL GROCERS**
good4u

Snooze
AN A.M. EATERY

EVEREVE

ILLEGAL★PETE'S

 **ATHLETA**


Fleming's
PRIME STEAKHOUSE & WINE BAR

Tommy John

Task 4: Marketing & Ongoing Outreach

**CICSC**
INNOVATING COMMERCE
SERVING COMMUNITIES

RETAIL LIVE!



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

QUESTIONS?