

Downtown Market Assessment

Sylvania, Georgia

July 7, 2023

*Prepared on behalf of
City of Sylvania, Georgia*

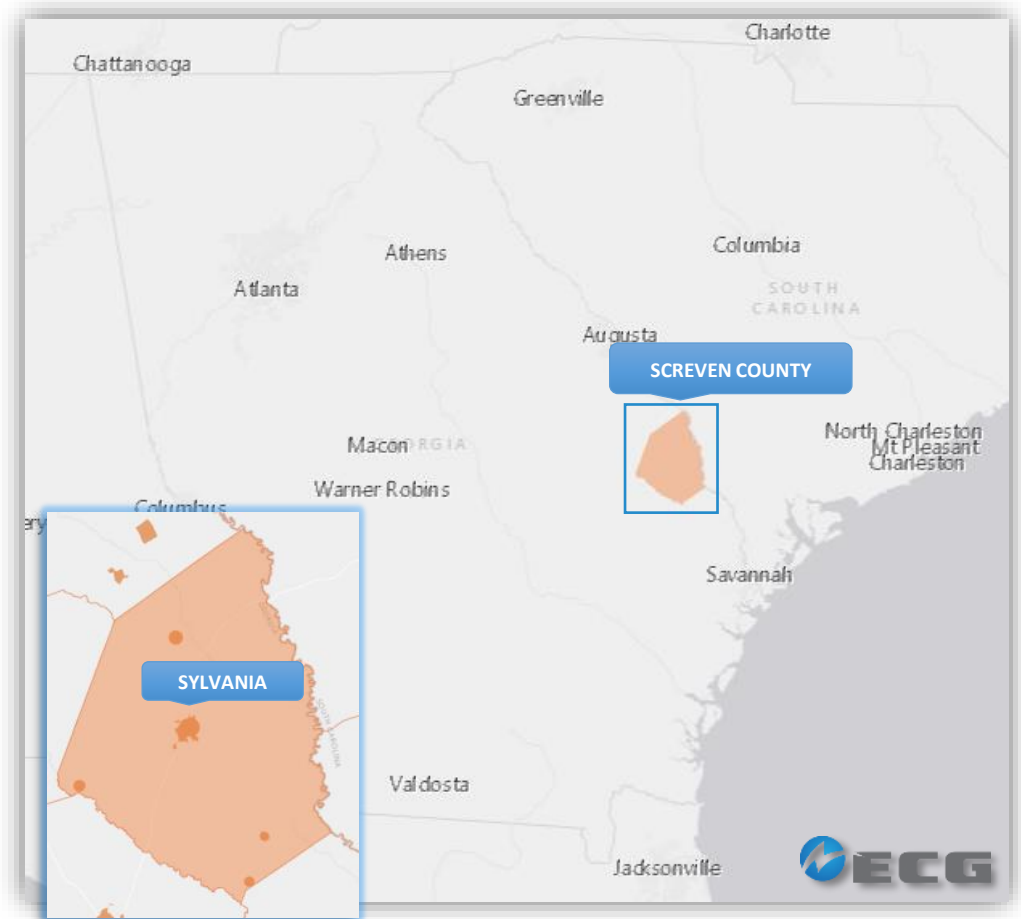
*Prepared by
ECG Office of Economic & Community Development*



Sylvania Downtown Market Assessment

About Sylvania

Sylvania is a city of approximately four-square miles located midway between Augusta and Savannah in Screven County. It is situated less than 15 miles from the border of South Carolina, which is demarcated by the Savannah River. US Highway 301 passes through the city and forms a connection with I-16 to the southwest, and Georgia Highway 21 links Sylvania and Savannah to the southeast. With a revitalized downtown district, Sylvania offers a high quality of life for its residents and provides an attractive tourist destination.



Sylvania Downtown Market Assessment

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Retail leakage refers to the phenomenon where retail sales in a given area are less than the retail spending (demand) of the residents in the same region. Conversely, a **retail surplus** refers to when retail sales in an area exceed retail spending by residents. A **retail leakage** often, though not always, indicates an opportunity to recruit and open new retail establishments allowing the opportunity to capture the excess spending by residents.

Retail Trade Areas

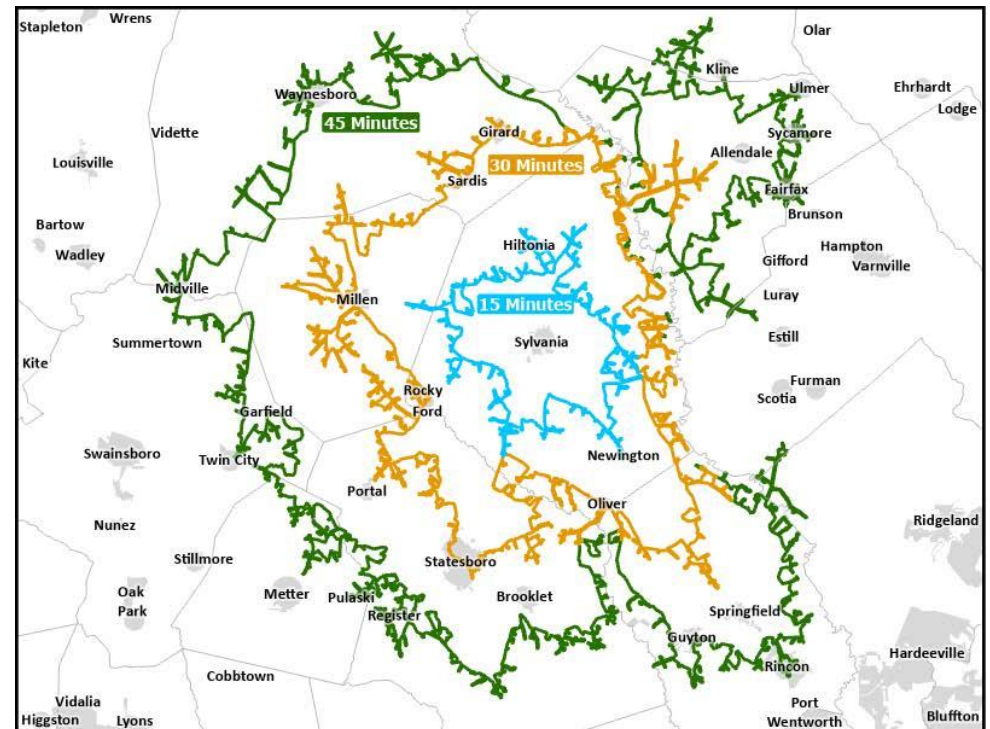
Primary Retail Trade Area

The primary retail trade area for Sylvania is the 15-minute drive time area from downtown Sylvania, which includes the cities of Sylvania and Hilltonia. The primary retail trade area has a population of 8,582 as of 2022 and a median household income of \$50,034. Within the area, there is an overall \$20.1 million retail leakage or opportunity. Specific categories of retail and dining experiencing a retail leakage, which may indicate an opportunity for new or expanded businesses in those categories, are Building/Garden Equipment/Supply Stores, Food & Beverage Stores, Clothing & Accessories Stores, Sports/Hobby/Book/Music Stores, and Food Services & Drinking Places. Please see the appendix of this document for the full leakage report for the Primary Retail Trade Area (15-minute drive time).

Regional Retail Trade Area

The regional retail trade area for Sylvania extends to the 45-minute drive time area from downtown Sylvania. This region represents the potential retail draw area for specialty retail and dining that may not be found in consumers' residential area. The regional retail trade area extends to encompass many Georgia cities including Statesboro, Guyton, Rincon, and various South Carolina cities, as well.

The population within the regional trade area is 136,023 as of 2022, with a median household income of \$51,688, which is slightly higher than the primary trade area and indicates an increased capacity for discretionary spending. The residents of the regional retail trade area make over \$1.14 billion in annual retail purchases, while the retailers in the area had over \$1.26 billion in retail sales, resulting in a retail surplus of about \$122 million. Please see the appendix of this document for the full leakage report for the Regional Retail Trade Area (45-minute drive time).



Retail Opportunity

Retail In Downtown Sylvania

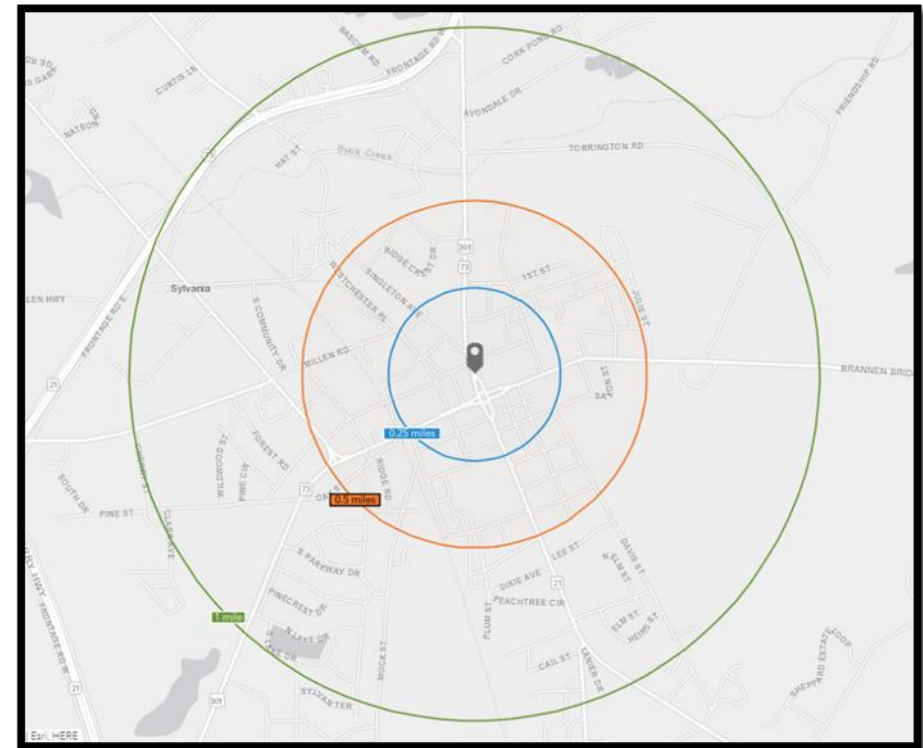
0.25 Miles From Downtown Sylvania

Within a quarter-mile of Sylvania's downtown, there are an estimated 212 people with a median age of nearly 38 years old. The median household income for those living within this radius is \$27,646, significantly lower than Georgia's median household income of \$67,470.

0.50 Miles From Downtown Sylvania

Within half of a mile of Sylvania's downtown, there are an estimated 792 people with a median age of nearly 39 years old. The median household income for those living within this radius is \$29,191, significantly lower than Georgia's median household income of \$67,470.

Within the area, there is an overall \$7.2 million retail surplus; however, there are three categories experiencing a leakage – Furniture/Home Furnishing Stores, Electronics/Appliances Stores, and Food/Beverage Stores. This may indicate an opportunity for new or expanded businesses in those categories. Please see the appendix of this document for the full leakage report for Downtown Buffer (0.50-mile radius).



Sylvania Retail Market

Downtown Sylvania is located near a number of retail businesses and restaurants throughout Screven County.

Restaurants

4 & 20 Bakers
Chilitos Mexican Grill
Huddle House
Little Dipper Ice Cream & Coffee
Little Dipper Café and Bakery
McDonald's
New China Restaurant
Pizza Hut
Pops Kitchen Inc
Road Tisserie
Stoner's Pizza
Subway
Walls Diner
Wing Street

Hotels & Motels

Sylvania Inn
Village Green Motel

Retailers

| | |
|--------------------------------|--------------------------------|
| 5 Star Collision Inc | Luxury Nails |
| Advance Auto Parts | Mary Joyce Florist |
| Ash's Creation of Beauty Salon | Mary's Beauty Shop |
| Auto Aid Inc | Maxway |
| Bazemore Auto Repair | Neighbors Express |
| Brooks Auto Parts | Nevaeh Grace Boutique |
| Brower Oil Co Inc | O'reilly Auto Parts |
| Brower Tire Store | Pampered Pet |
| Camilles Hair Studio | Possum Eddy Ace Hardware |
| Christina's Fashion Jewelry | Possum Eddy Inc |
| Clippers | Ray's Service Station |
| Cosmotique Hair Fashion | Rebecca's |
| Cotton Patch | Roses Express |
| Dollar General | Rusty's One Stop |
| Elcheapo | Salon On Maple |
| Family Dollar | Screven Tire Co |
| Farmers Home Furniture | Shear Perfection Salon |
| Food Lion | Sign & Drive Auto Sales |
| Four Way Stop | Skating Rink & Entertainment |
| Gary's Southside Mini-Mart | Southern Star Fitness |
| Hair Plus | Southernoutlet.com |
| Hunter's Garage | Studio B Salon |
| In & Out Llc | Sylvania Discount Tobacco |
| Just Cut'n up | Sylvania Florist |
| Kathleen's Pet Grooming Salon | Variety Store |
| Kj's Market IGA | VIP Barber Shop & Beauty Salon |
| La Nails & Tanning Salon | Wallis Paint & Body Inc |

Retail Opportunity

Additional Retail Demand Generators

There are several factors and attractions that contribute to retail demand in the Sylvania primary and regional trade areas.

- **Historical and Recreational Tourist Destination:** Downtown Sylvania is only minutes away from many historical sites throughout Screven County, including the Dell Goodall House, Wade Plantation, a monument for the site of Battle of Brier Creek, the only operating water-powered grist mill at the Robbins Grist Mill, and what is recognized as the State's oldest Welcome Center. Recreational activities available in the Sylvania area include Black Creek Scout Reservation (a 350-acre site offering a private lake for swimming, boating, and fishing, a 50-foot climbing tower, a ropes course, and archer and firearm ranges) and Tuckahoe Wildlife Management Area (15,000 acres of state-owned hunting and fishing preserve).
- **Proximity to Statesboro, Georgia:** Statesboro, is a city of more than 54,000 as of 2021 and is within Sylvania's regional trade area. People could be drawn from this regional population center if induced by the right dining or shopping options in Sylvania.

Downtown Sylvania Retail Market: Challenges, Assets, and Opportunities

Challenges

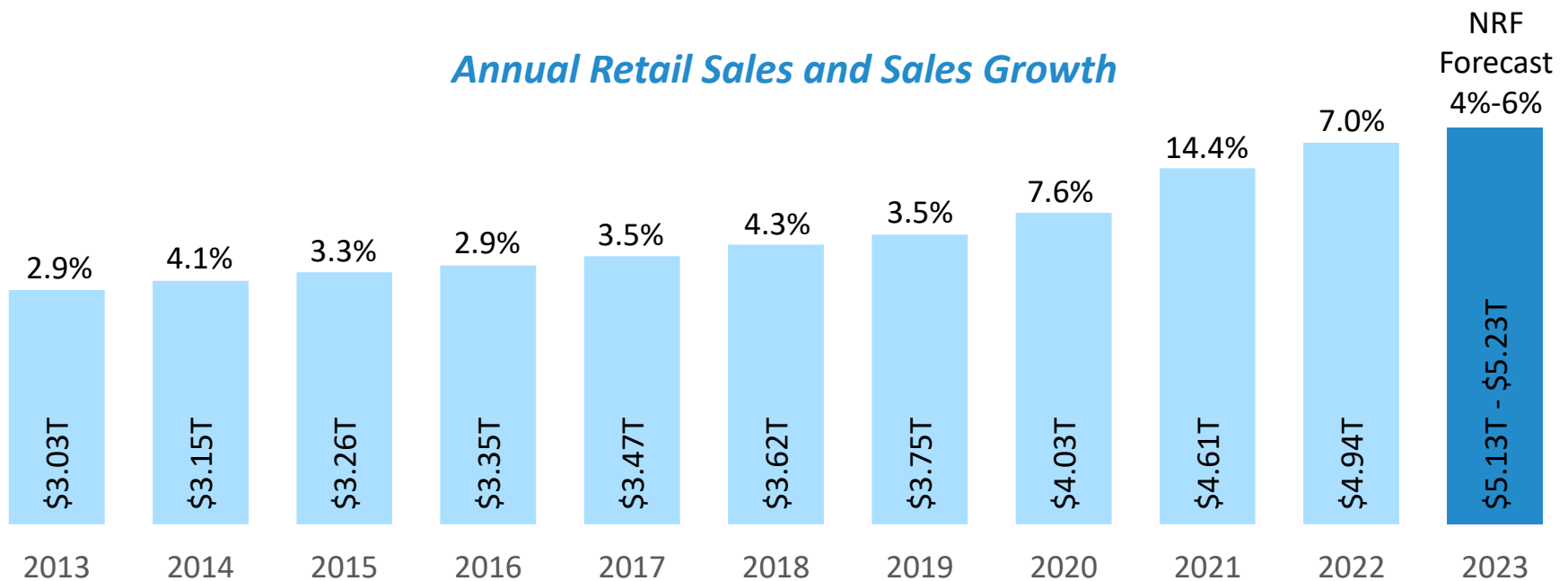
- The median household income of the City of Sylvania and the retail trade areas is lower than some national retailers look for in their customer base.
- With a smaller local population, attracting a wide variety of retail options may be more difficult. Sylvania stakeholders will have to tell the story of Sylvania in a way that goes beyond the hard numbers.

Assets and Opportunities

- Sylvania has a historic downtown with an abundance of charm.
- Sylvania has a net commuter inflow, contributing to a higher daytime population.

National Retail Market

The national retail market has undergone rapid changes in the past few years due to the COVID-19 pandemic and the economic and social changes that have come from it. Shifting consumer preferences and needs, the growth of e-commerce, and supply chain and logistics challenges have all contributed to recent retail changes. Temporary shifts toward food at home and away from dining out created a shift in the food supply chain that has slowly been returning to its pre-pandemic patterns. NRF forecasts that retail sales during 2023 will grow between 4% and 6% over 2022 to between \$5.13 trillion and \$5.23 trillion. Last year's annual retail sales grew 7.0% over 2021 and totaled \$4.9 trillion. This growth rate is above the pre-pandemic, average annual retail sales growth of 3.6%.

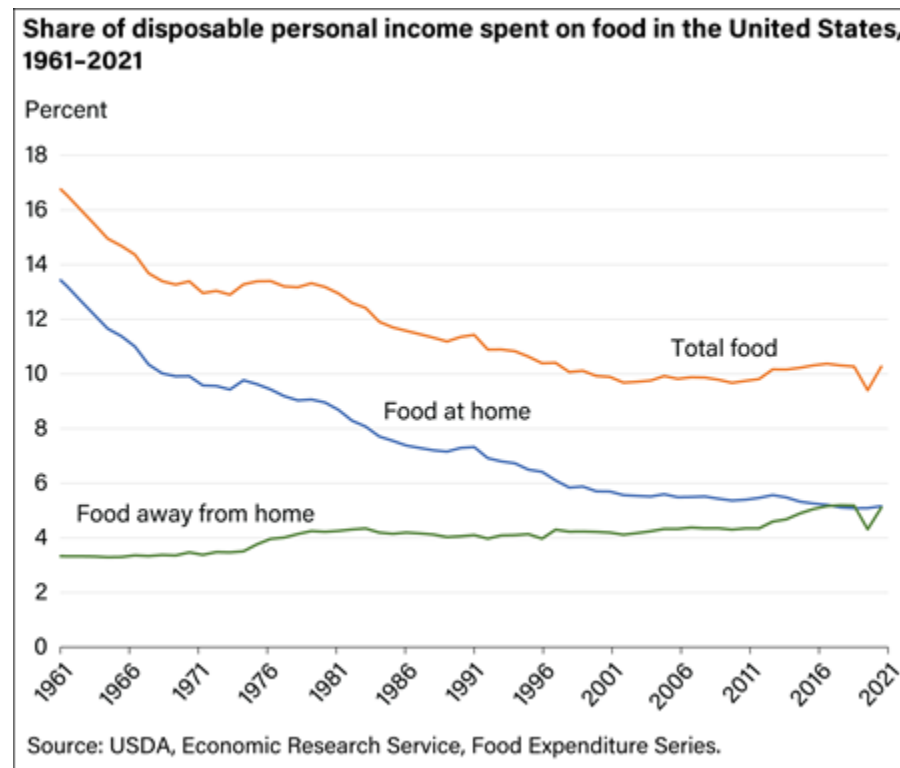


*National Retail Foundation (NRF), based on U.S. Census Bureau data
Note: Excludes automobile dealers, gasoline stations, and restaurants
2022 figures are preliminary as of March 15, 2023, and 2023 figures are NRF projections*

National Retail Market

Food Sales in the United States

Trends leading up to 2021 had seen food sales in the United States shift from mostly food at home to mostly food away from home. In 2020 and 2021, due to lockdowns and fears of catching COVID while dining out, consumer preferences shifted toward food at home in a break with previous trends. In 2020, in Screven equal shares of sales were spent on food at home and food away from home, and, in 2021, more money was spent on food at home than food away from home. However, many analysts expect this to be a temporary situation and expect the previous shift toward food away from home to continue in 2023 and beyond.



Note: Data shown is the latest available. Data is on a two-year lag.

Demographics & Psychographics

The following analysis consists of an overview of the demographic and socioeconomic status of the residents of the **City of Sylvania**, alongside comparative statistics for the surrounding area to provide context.

Population

The City of Sylvania's estimated 2022 population of 2,646 is almost the same as the city's 2020 population of 2,634. It is projected that the population will stay almost the same over the next five years.

Over the period between 2010 and 2022, the populations of Sylvania and Screven County have decreased slightly. In the next five years, the populations of both the city and the county are expected to stay relatively steady.

| Population | City of Sylvania | Screven County | State of Georgia |
|-----------------|------------------|----------------|------------------|
| 2010 Census | 2,679 | 14,593 | 9,687,653 |
| 2020 Census | 2,634 | 14,067 | 10,711,908 |
| 2022 Estimate | 2,646 | 13,968 | 10,940,545 |
| 2027 Projection | 2,620 | 13,940 | 11,223,497 |

| Population | City of Sylvania | Screven County | State of Georgia |
|---------------------------------|------------------|----------------|------------------|
| Percent Change: 2010 to 2020 | -1.7% | -3.4% | 10.6% |
| Percent Change: 2020 to 2022 | 0.5% | -0.7% | 2.1% |
| Percent Change: 2022 to 2027 | -0.1% | -0.2% | 2.6% |

U.S. Census Bureau, Decennial Census (2010, 2020); Esri (2022, 2027)

Demographics & Psychographics

Race/Ethnicity

The two main racial groups in Sylvania and Screven County are White and Black, followed by “Two or More Races.” Other racial groups make up a relatively small share of the population. Residents of Hispanic of Latino origin, who can be of any race, make up about 2.5 percent of the population of Sylvania and 2.0 percent of the population of Screven County.

Age

The median age of Sylvania residents is 40.2 years, which is younger than the Screven County median age of 41.7 years and older than the State of Georgia median age of 37.2 years. By comparing the populations of Sylvania and Screven County, it is evident that the age distribution of the county skews slightly older than that of the city.

| Race/Ethnicity | City of Sylvania | Screven County | State of Georgia |
|--|------------------|----------------|------------------|
| White | 48.2% | 57.5% | 51.4% |
| Black / African American | 44.8% | 37.7% | 31.0% |
| American Indian | 0.2% | 0.4% | 0.5% |
| Asian | 1.4% | 0.4% | 4.6% |
| Native Hawaiian / Pacific Islander | 0.0% | 0.1% | 0.1% |
| Some Other Race | 1.1% | 0.8% | 5.3% |
| Two or More Races | 4.4% | 3.2% | 7.2% |
| Hispanic / Latino Origin (of Any Race) | 2.5% | 2.0% | 10.6% |

| Age | City of Sylvania | Screven County | State of Georgia |
|------------------|------------------|----------------|------------------|
| Median Age | 40.2 | 41.7 | 37.2 |
| Under Age 18 | 23.7% | 22.2% | 23.0% |
| Age 65 and Older | 20.1% | 20.3% | 14.9% |

Esri (2022)

Demographics & Psychographics

Educational Attainment

Educational attainment levels tend to go hand-in-hand with income levels and can impact growth of a community and its recreational spending capacity. The City of Sylvania and Screven County have lower overall levels of educational attainment than the State of Georgia average.

| Highest Educational Attainment (Population Ages 25+) | City of Sylvania | Screven County | State of Georgia |
|---|-------------------------|-----------------------|-------------------------|
| No High School Diploma | 19.4% | 15.5% | 10.6% |
| High School Graduate (or GED) | 45.2% | 41.6% | 27.6% |
| Some College, No Degree | 17.2% | 20.3% | 18.4% |
| Associate's Degree | 4.2% | 6.4% | 8.8% |
| Bachelor's Degree | 10.5% | 9.8% | 21.3% |
| Graduate or Professional Degree | 3.6% | 6.4% | 13.3% |
| High School Graduate or Higher | 80.6% | 84.5% | 89.4% |
| Bachelor's Degree or Higher | 14.1% | 16.2% | 34.6% |

Esri (2022)

Demographics & Psychographics

Households

As of 2022, the City of Sylvania has an estimated 1,068 households, which is a slight 0.7 percent decrease from the 2020 Census figure of 1,076 households. From 2010 to 2020, Sylvania experienced a 5.1 percent increase in the number of households. Georgia is expected to see an increase in the number of households in the next five years, while Sylvania will see a slight decrease and Screven County will see a slight increase.

| Households | City of Sylvania | Screven County | State of Georgia |
|-----------------|------------------|----------------|------------------|
| 2010 Census | 1,024 | 5,596 | 3,585,584 |
| 2020 Census | 1,076 | 5,646 | 4,020,808 |
| 2022 Estimate | 1,068 | 5,633 | 4,113,426 |
| 2027 Projection | 1,062 | 5,664 | 4,229,425 |

| Household Growth | City of Sylvania | Screven County | State of Georgia |
|------------------------------|------------------|----------------|------------------|
| Percent Change: 2010 to 2020 | 5.1% | 0.9% | 12.1% |
| Percent Change: 2020 to 2022 | -0.7% | -0.2% | 2.3% |
| Percent Change: 2022 to 2027 | -0.6% | 0.6% | 2.8% |

| Household Characteristics | City of Sylvania | Screven County | State of Georgia |
|--|------------------|----------------|------------------|
| Average Household Size | 2.44 | 2.44 | 2.60 |
| % of Households with Children Under Age 18 | 33.3% | 34.0% | 32.6% |

Esri (2022)

Household Characteristics

In 2022, the estimated average household size in the City of Sylvania and Screven County was 2.44, close to the average household size in the State of Georgia (2.60). Approximately 33.3 percent of Sylvania households have at least one child, which is comparable to Screven County (34.0 percent) and the State of Georgia (32.6 percent).

Demographics & Psychographics

Income

Household income can indicate purchasing power and economic potential of a community. As of 2022, the estimated median household income for the City of Sylvania is \$38,847, compared with \$50,485 in Screven County, and \$67,470 in the State of Georgia. The household income distribution is more concentrated at lower income levels in Sylvania and Screven County than it is in the State of Georgia.

| Income | City of Sylvania | Screven County | State of Georgia |
|--------------------------|-------------------------|-----------------------|-------------------------|
| Median Household Income | \$38,847 | \$50,485 | \$67,470 |
| Average Household Income | \$56,985 | \$68,840 | \$98,333 |

Esri (2022)

Demographics & Psychographics

Poverty, Disability, and Social Characteristics

The percentage of the population living at or below the poverty level in Sylvania and Screven County is slightly higher than the state average at 17 percent and 20.4 percent, respectively. Households receiving SNAP or food stamps amount to 21.2 percent and 15.8 percent of Sylvania and Screven County, respectively.

| Poverty , Disability, and Social Characteristics | City of Sylvania | Screven County | State of Georgia |
|---|------------------|----------------|------------------|
| Poverty Level (of all people) | 17.0% | 20.4% | 14.3% |
| Households Receiving Food Stamps/SNAP | 21.2% | 15.8% | 12.2% |
| Enrolled in Grade 12 (% of total population) | 2.0% | 1.0% | 1.5% |
| Disconnected Youth* | 0.0% | 11.8% | 3.1% |
| Children in Single Parent Families (% of all children) | 44.4% | 56.2% | 38.1% |
| Uninsured | 16.5% | 13.6% | 13.0% |
| With a Disability, Age 18-64 | 17.8% | 12.8% | 10.6% |
| With a Disability, Age 18-64, Labor Force Participation Rate and Size | 19.1% | 25.6% | 41.0% |
| Foreign Born | 2.1% | 1.4% | 10.2% |
| Speak English Less Than Very Well (population 5 yrs and over) | 0.7% | 0.9% | 5.4% |

U.S. Census Bureau American Community Survey 5-Year Estimates 2016-2020

**Disconnected Youth are 16–19-year-olds who are (1) not in school, (2) not high school graduates, and (3) either unemployed or not in the labor force.*

Demographics & Psychographics

Housing

Owner-occupied housing units account for 59.1 percent of the occupied housing units in Sylvania and 70.5 percent of Screven County as of 2020.

| Housing | City of Sylvania | Screven County | State of Georgia |
|--|------------------|----------------|------------------|
| Total Housing Units | 1,294 | 6,798 | 4,329,675 |
| Median House Value (of owner-occupied units) | \$86,800 | \$85,700 | \$190,200 |
| Homeowner Vacancy | 2.4% | 0.6% | 1.7% |
| Rental Vacancy | 18.5% | 20.2% | 6.5% |
| Renter-Occupied Housing Units (% of Occupied Units) | 40.9% | 29.5% | 36.0% |
| Occupied Housing Units with No Vehicle Available (% of Occupied Units) | 9.7% | 6.5% | 6.3% |

U.S. Census Bureau American Community Survey 5-Year Estimates 2016-2020

Demographics & Psychographics

Psychographics

Esri produces a psychographic classification system, which categorizes people in each area by their values and purchasing behavior, called Tapestry Segmentation. Tapestry Segmentation classifies US neighborhoods into 67 unique segments, based on demographics and socioeconomic characteristics. Esri Tapestry Segmentation includes three indexes displaying average household wealth, socioeconomic status, and housing affordability for the market relative to US standards. Below are the top three tapestry segments within the primary and regional retail trade areas of downtown Sylvania. Please see the Appendix for details about these tapestry segments.

| Primary Retail Trade Area (15-Minute Drive Time Area of Downtown Sylvania) | | Regional Retail Trade Area (45-Minute Drive Time Area of Downtown Sylvania) | |
|---|----------------------------|--|---------------------------|
| 1. | Rural Bypasses (10E) | 1. | Rural Bypasses (10E) |
| 2. | Small Town Sincerity (12C) | 2. | Middleburg (4C) |
| 3. | Rooted Rural (10B) | 3. | Southern Satellites (10A) |

Esri (2022)

Economic Conditions & Labor Force

The following section presents an overview of economic conditions in the **City of Sylvania**, including labor force breakdowns, commuter patterns, occupational data, and industry data.

Labor Force and Unemployment

About 52.6 percent of the population of Screven County ages 16 and older are in the labor force, which means they are either employed or unemployed and actively seeking work. This is lower than the labor force participation rate* of the State of Georgia (63.1 percent).

The March 2023 unemployment rate in Screven County is 5.7 percent, compared with 3.3 percent in Georgia. The prime-age labor force participation rate* in Screven County is 71.7 percent, lower than the Georgia rate of 81.1 percent.

| Labor Force | City of Sylvania | Screven County | State of Georgia |
|---|-------------------------|-----------------------|-------------------------|
| Labor Force Size (Ages 16 and older) | 922 | 5,960 | 5,201,775 |
| Labor Force Participation Rate* | 44.5% | 52.6% | 63.1% |
| Unemployment Rate** | N/A | 5.7% | 3.3% |
| Prime-Age Labor Force Size (Ages 25-54) | 580 | 3,642 | 3,421,408 |
| Prime-Age Labor Force Participation Rate* | 75.7% | 71.7% | 81.1% |

JobsEQ

**The labor force participation rate is defined as the percentage of the civilian population of an area ages 16 and older who are in the labor force, which means they are either employed or unemployed and actively seeking work. The prime-age labor force participation rate is defined as the percentage of the civilian population of an area ages 25 to 54 who are in the labor force.*

***Unemployment rate is as of March 2023 and sourced from the Bureau of Labor Statistics Local Area Unemployment Statistics (LAUS).*

Economic Conditions & Labor Force

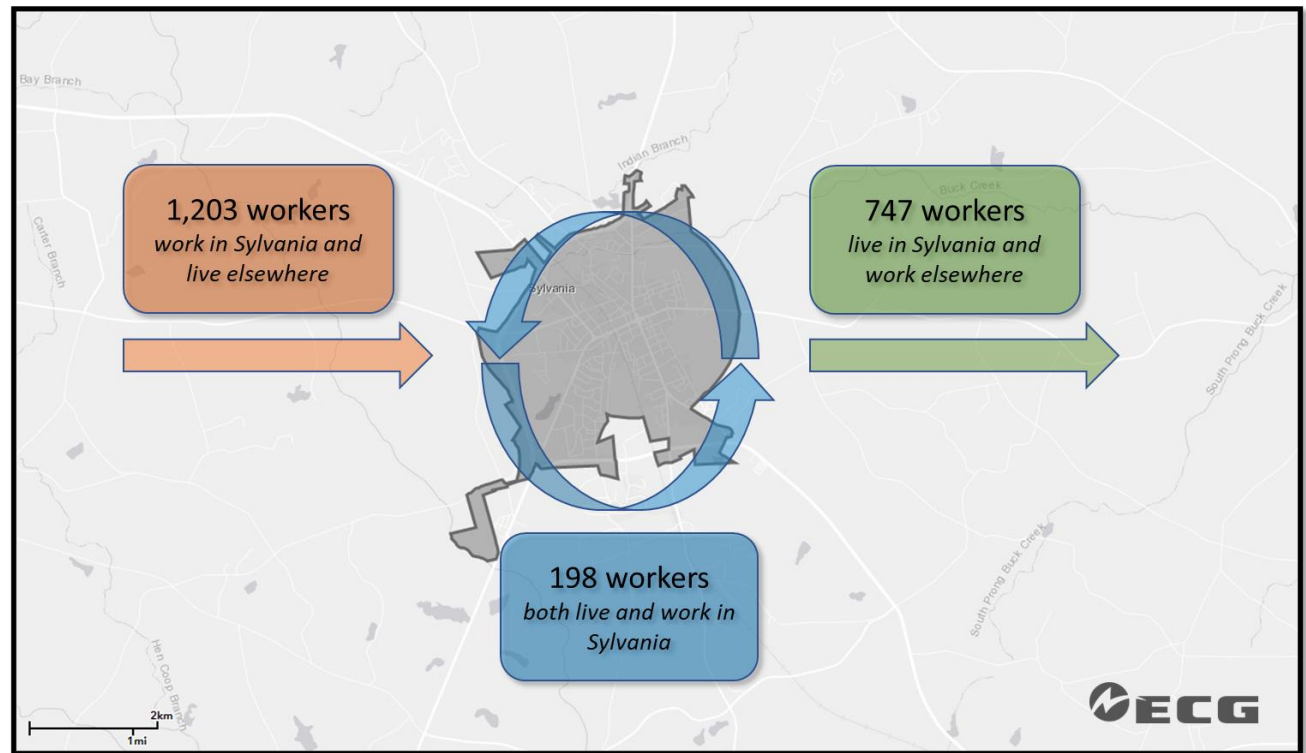
| Labor Market Size | Count | Share |
|----------------------|-------|--------|
| Employed in Sylvania | 1,401 | 100.0% |
| Living in Sylvania | 945 | 67.5% |
| Net Job Inflow (+) | +456 | - |

| Labor Force Efficiency | Count | Share |
|---|-------|--------|
| Living in Sylvania | 945 | 100.0% |
| Living and Employed in Sylvania | 198 | 21.0% |
| Living in Sylvania but Employed Elsewhere | 747 | 79.0% |

| Employment Efficiency | Count | Share |
|---|-------|--------|
| Employed in Sylvania | 1,401 | 100.0% |
| Employed and Living in Sylvania | 198 | 14.1% |
| Employed in Sylvania but Living Elsewhere | 1,203 | 85.9% |

Commute

In 2021, Sylvania and Screven County residents had much higher average commute times at 35.0 and 33.7 minutes, respectively, than Georgia residents at 28.6 minutes. About 79 percent of Sylvania residents with jobs commuted to workplaces outside of the city. For Screven County residents with jobs, about 62 percent commuted to workplaces outside of the county. More workers commute into Sylvania than commute out of Sylvania, resulting in a net commuter inflow. Conversely, Screven County has a net commuter outflow.



U.S. Census Bureau, Center for Economic Studies, LEHD / OnTheMap (2020)

Economic Conditions & Labor Force

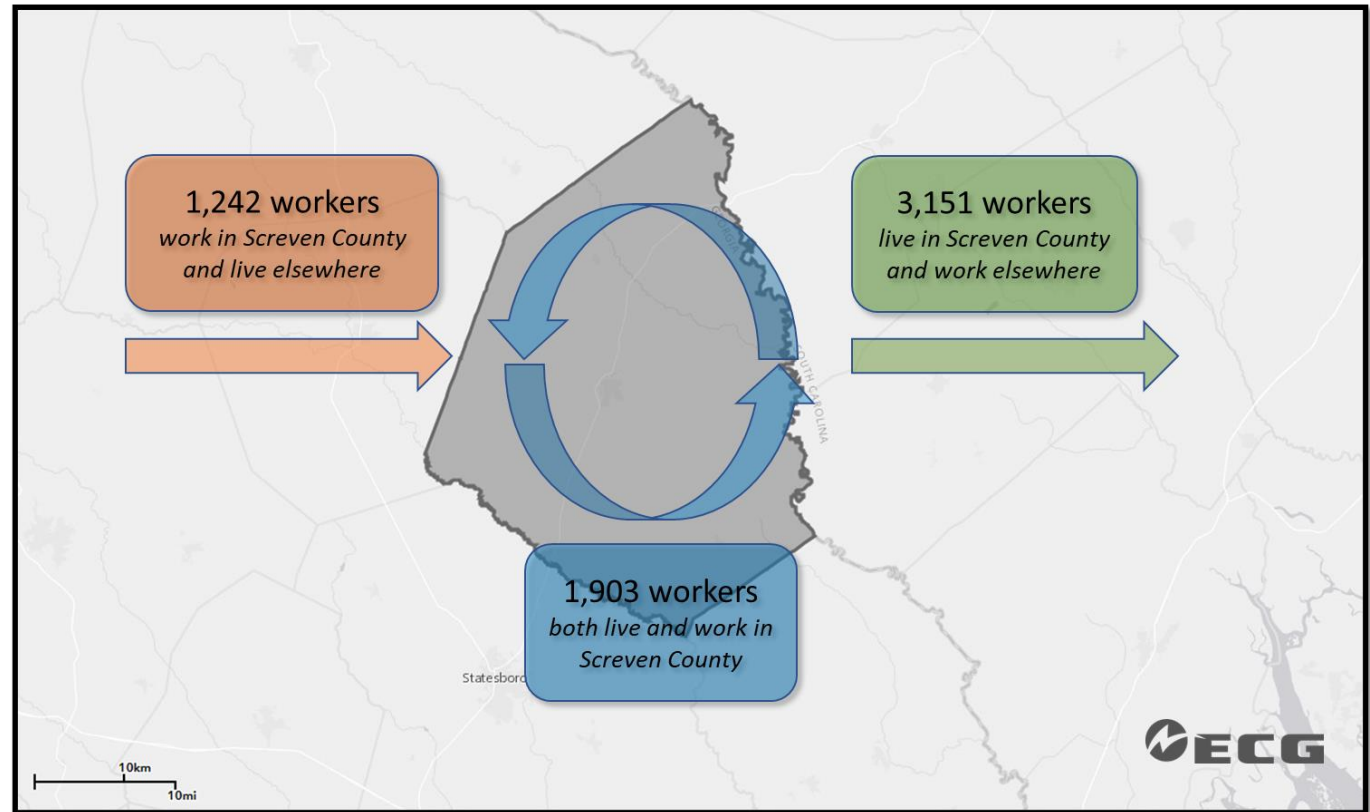
| Labor Market Size | Count | Share |
|----------------------------|--------|--------|
| Employed in Screven County | 3,145 | 100.0% |
| Living in Screven County | 5,054 | 160.7% |
| Net Job Outflow (-) | -1,909 | - |

| Labor Force Efficiency | Count | Share |
|---|-------|--------|
| Living in Screven County | 5,054 | 100.0% |
| Living and Employed in Screven County | 1,903 | 37.7% |
| Living in Screven County but Employed Elsewhere | 3,151 | 62.3% |

| Employment Efficiency | Count | Share |
|---|-------|--------|
| Employed in Screven County | 3,145 | 100.0% |
| Employed and Living in Screven County | 1,903 | 60.5% |
| Employed in Screven County but Living Elsewhere | 1,242 | 39.5% |

Commute

Note: In some instances, OnTheMap commuter data may capture employees who work remotely or who work in a different office location than is reflected in the data. Data is based on self-reporting from employers and errors or misclassifications are possible. In addition, the latest official commuter data is from 2020 and it is possible that the commuter patterns may have shifted significantly since then, reflecting national trends.



U.S. Census Bureau, Center for Economic Studies, LEHD / OnTheMap (2020)

Economic Conditions & Labor Force

Occupations

Approximately 51 percent of Sylvania workers (who live in the city but may work anywhere) are employed in “White Collar” occupations, 32.3 percent work in “Blue Collar” occupations, and 16.7 percent work in “Services.” Screven County’s occupational breakdown is similar to Sylvania, with 49.2 percent of Screven County workers employed in White Collar occupations, 36.8 percent employed in Blue Collar occupations, and 13.9 percent in Services. Sylvania and Screven County both have a lower percentage of workers in White Collar occupations and a higher percentage of workers in Blue Collar occupations than in the State of Georgia.

| Occupations | City of Sylvania | Screven County | State of Georgia |
|---------------------------------|------------------|----------------|------------------|
| White Collar | 51.0% | 49.2% | 61.5% |
| Management/Business/Financial | 9.5% | 9.8% | 18.0% |
| Professional | 23.1% | 20.4% | 22.7% |
| Sales | 7.4% | 8.2% | 9.5% |
| Administrative Support | 11.0% | 10.9% | 11.3% |
| Services | 16.7% | 13.9% | 14.6% |
| Blue Collar | 32.3% | 36.8% | 23.9% |
| Farming/Forestry/Fishing | 1.6% | 1.0% | 0.4% |
| Construction/Extraction | 2.3% | 5.6% | 4.9% |
| Installation/Maintenance/Repair | 2.1% | 4.7% | 3.4% |
| Production | 9.7% | 8.9% | 5.8% |
| Transportation/Material Moving | 16.6% | 16.6% | 9.4% |

Esri (2022)

Economic Conditions & Labor Force

Industry Employment

There are approximately 1,030 workers who live in the City of Sylvania as of 2022 and 5,589 workers in Screven County. The largest category of employment for both Sylvania and Screven County is Services, followed by Manufacturing, Transportation/Utilities, and Retail Trade.

| Industry | City of Sylvania | Screven County | State of Georgia |
|-------------------------------|-------------------------|-----------------------|-------------------------|
| Agriculture/Mining | 2.8% | 3.1% | 0.9% |
| Construction | 4.7% | 7.9% | 7.0% |
| Manufacturing | 18.2% | 16.7% | 10.2% |
| Wholesale Trade | 1.4% | 0.4% | 2.8% |
| Retail Trade | 10.2% | 11.0% | 10.6% |
| Transportation/Utilities | 9.4% | 12.4% | 8.0% |
| Information | 0.7% | 1.5% | 2.3% |
| Finance/Insurance/Real Estate | 3.2% | 2.5% | 6.6% |
| Services | 44.7% | 40.5% | 46.8% |
| Public Administration | 4.8% | 4.0% | 4.8% |

Esri (2022)

Downtown Market Recommendations

Downtown Sylvania has challenges to developing its retail potential, but it has as many or more assets and opportunities. The following recommendations are aimed to provide focus areas and steps to follow to develop the retail potential of downtown Sylvania and the City of Sylvania as a whole:

Focus on attracting customers from the regional retail trade area to enjoy downtown dining, shopping, and recreational opportunities

The regional retail trade area has a larger population with a higher disposable income than the primary retail trade area. By leveraging nearby tourist attractors, downtown Sylvania can draw in customers with spending potential to its businesses.

Target business development in downtown to create a regional destination.

Develop additional venues, dining, and shopping opportunities to attract visitors to downtown Sylvania.

Develop businesses in the downtown district to serve residents of the primary retail trade area.

Attracting businesses in industry sectors with a retail leakage may help draw in additional retail dollars from residents in the immediate area. These industry sectors include Building/Garden Equipment/Supply Stores, Food/Beverage Stores, Clothing/Accessories Stores, Sports/Hobby/Book/Music Stores, and Food Services & Drinking Places. Please see the Appendix for additional retail leakage and surplus data.

Expand marketing efforts for attractions, events, and festivals in trade magazines and other channels.

Advertise special attractions and events in specialty magazines and on social media to draw more visitors to the community.

Appendix

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|-----------------------------|----|
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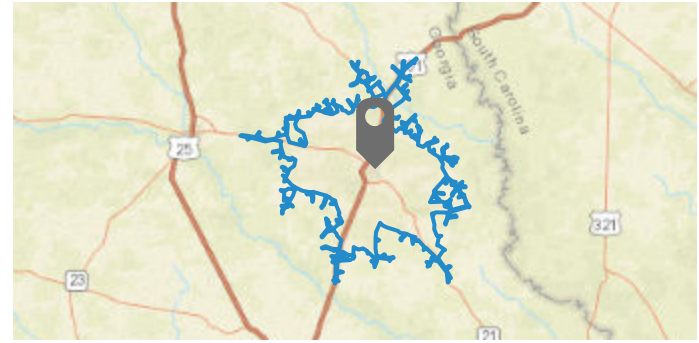
For inquiries, please contact:

Michelle Holbrook
ECG – Director, External Affairs
c. 678.313.4441
e. mholbrook@ecoga.org

Morgan Ferguson
ECG - Research Analyst
c. 678.682.4777
e. mferguson@locationgeorgia.com



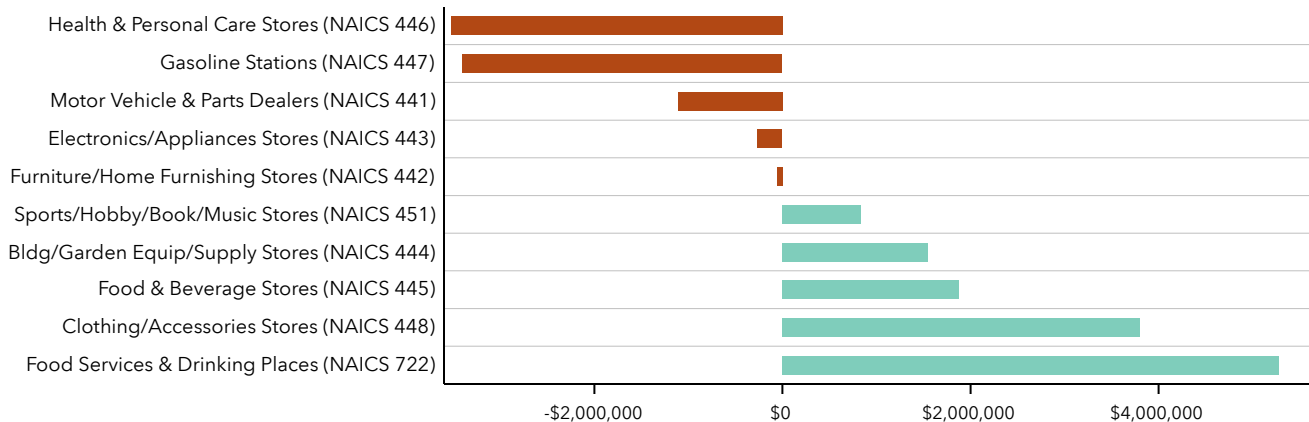
| Summary Information | 2022 | 2027 |
|--------------------------|----------|----------|
| Population | 8,582 | 8,525 |
| Households | 3,450 | 3,445 |
| Families | 6,872 | 6,807 |
| Average Household Size | 2.43 | 2.42 |
| Median Household Income | \$50,034 | \$54,151 |
| Average Household Income | \$66,137 | \$74,742 |
| Per Capita Income | \$26,542 | \$30,150 |
| Median Age | 40.5 | 42.1 |



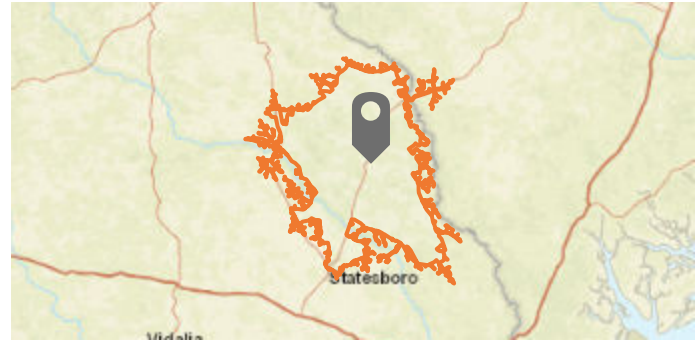
| Industry Summary | NAICS Code | Demand (Retail Potential) | Supply (Retail Sales) | Retail Gap Leakage(+) Surplus(-) | No. of Businesses |
|---------------------------------|------------|------------------------------|--------------------------|---------------------------------------|-------------------|
| Total Retail Trade | 44-45 | \$71,171,392 | \$56,262,000 | \$14,909,392 | 59 |
| Total Food/Drink | 722 | \$10,216,960 | \$4,941,000 | \$5,275,960 | 12 |
| Total Retail Sales & Food/Drink | 44-45, 722 | \$81,388,352 | \$61,203,000 | \$20,185,352 | 71 |

| Industry Groups | NAICS Code | Demand (Retail Potential) | Supply (Retail Sales) | Retail Gap Leakage(+) Surplus(-) | No. of Businesses |
|----------------------------------|------------|------------------------------|--------------------------|---------------------------------------|-------------------|
| Motor Vehicle & Parts Dealers | 441 | \$9,069,960 | \$10,178,000 | -\$1,108,040 | 9 |
| Furniture/Home Furnishing Stores | 442 | \$1,825,872 | \$1,886,000 | -\$60,128 | 2 |
| Electronics/Appliances Stores | 443 | \$1,759,846 | \$2,024,000 | -\$264,154 | 2 |
| Bldg/Garden Equip/Supply Stores | 444 | \$4,301,187 | \$2,756,000 | \$1,545,187 | 3 |
| Food & Beverage Stores | 445 | \$16,891,227 | \$15,019,000 | \$1,872,227 | 13 |
| Health & Personal Care Stores | 446 | \$2,124,272 | \$5,653,000 | -\$3,528,728 | 4 |
| Gasoline Stations | 447 | \$8,279,901 | \$11,684,000 | -\$3,404,099 | 5 |
| Clothing/Accessories Stores | 448 | \$5,128,827 | \$1,330,000 | \$3,798,827 | 5 |
| Sports/Hobby/Book/Music Stores | 451 | \$1,097,923 | \$268,000 | \$829,923 | 1 |
| Food Services & Drinking Places | 722 | \$10,216,960 | \$4,941,000 | \$5,275,960 | 12 |

Leakage/Surplus (Retail Gap) by Retail Type



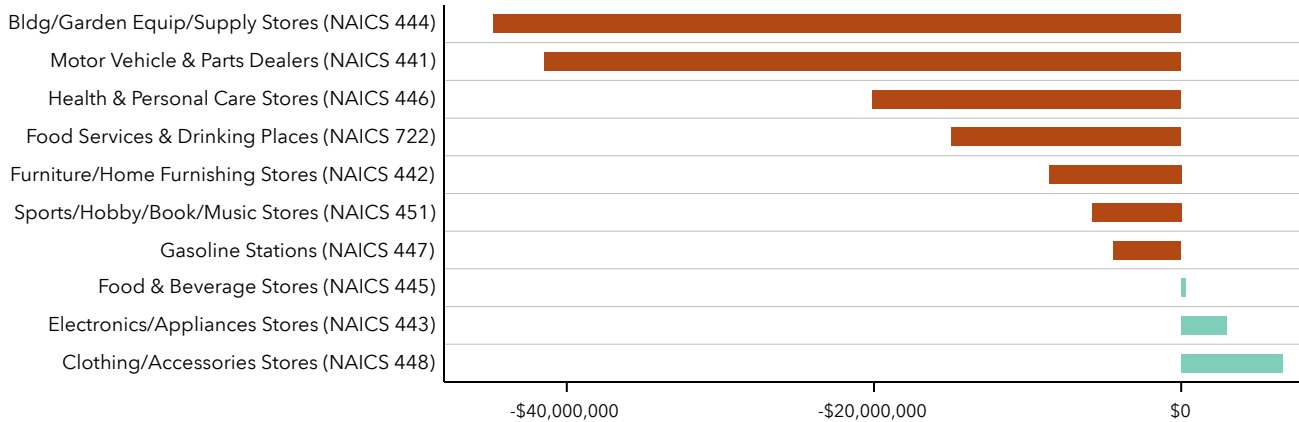
| Summary Information | 2022 | 2027 |
|--------------------------|----------|----------|
| Population | 35,850 | 36,338 |
| Households | 14,091 | 14,432 |
| Families | 27,430 | 27,678 |
| Average Household Size | 2.41 | 2.39 |
| Median Household Income | \$48,601 | \$53,939 |
| Average Household Income | \$64,577 | \$73,599 |
| Per Capita Income | \$25,516 | \$29,379 |
| Median Age | 38.2 | 39.6 |



| Industry Summary | NAICS Code | Demand (Retail Potential) | Supply (Retail Sales) | Retail Gap Leakage(+) Surplus(-) | No. of Businesses |
|---------------------------------|------------|------------------------------|--------------------------|---------------------------------------|-------------------|
| Total Retail Trade | 44-45 | \$267,639,683 | \$427,021,000 | -\$159,381,317 | 263 |
| Total Food/Drink | 722 | \$40,993,514 | \$55,963,000 | -\$14,969,486 | 66 |
| Total Retail Sales & Food/Drink | 44-45, 722 | \$308,633,197 | \$482,984,000 | -\$174,350,803 | 329 |

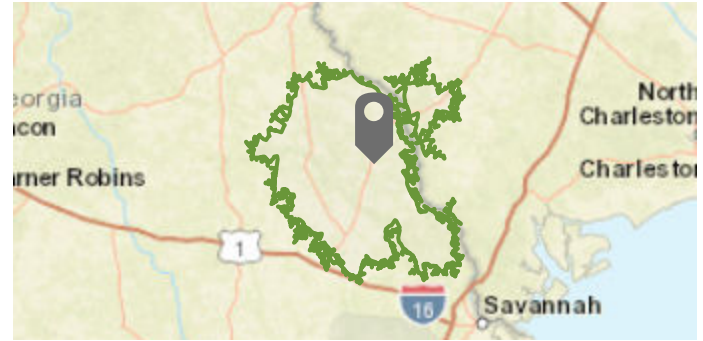
| Industry Groups | NAICS Code | Demand (Retail Potential) | Supply (Retail Sales) | Retail Gap Leakage(+) Surplus(-) | No. of Businesses |
|----------------------------------|------------|------------------------------|--------------------------|---------------------------------------|-------------------|
| Motor Vehicle & Parts Dealers | 441 | \$33,626,499 | \$75,069,000 | -\$41,442,501 | 41 |
| Furniture/Home Furnishing Stores | 442 | \$6,999,871 | \$15,599,000 | -\$8,599,129 | 16 |
| Electronics/Appliances Stores | 443 | \$6,846,962 | \$3,876,000 | \$2,970,962 | 5 |
| Bldg/Garden Equip/Supply Stores | 444 | \$14,828,091 | \$59,625,000 | -\$44,796,909 | 15 |
| Food & Beverage Stores | 445 | \$64,572,678 | \$64,279,000 | \$293,678 | 48 |
| Health & Personal Care Stores | 446 | \$8,707,436 | \$28,786,000 | -\$20,078,564 | 18 |
| Gasoline Stations | 447 | \$30,312,669 | \$34,718,000 | -\$4,405,331 | 14 |
| Clothing/Accessories Stores | 448 | \$20,923,759 | \$14,273,000 | \$6,650,759 | 23 |
| Sports/Hobby/Book/Music Stores | 451 | \$4,399,469 | \$10,217,000 | -\$5,817,531 | 15 |
| Food Services & Drinking Places | 722 | \$40,993,514 | \$55,963,000 | -\$14,969,486 | 66 |

Leakage/Surplus (Retail Gap) by Retail Type



Source: U.S. Census Bureau, Decennial Census 2020 and ACS 2016-2020.
Esri forecasts for 2022 and 2027

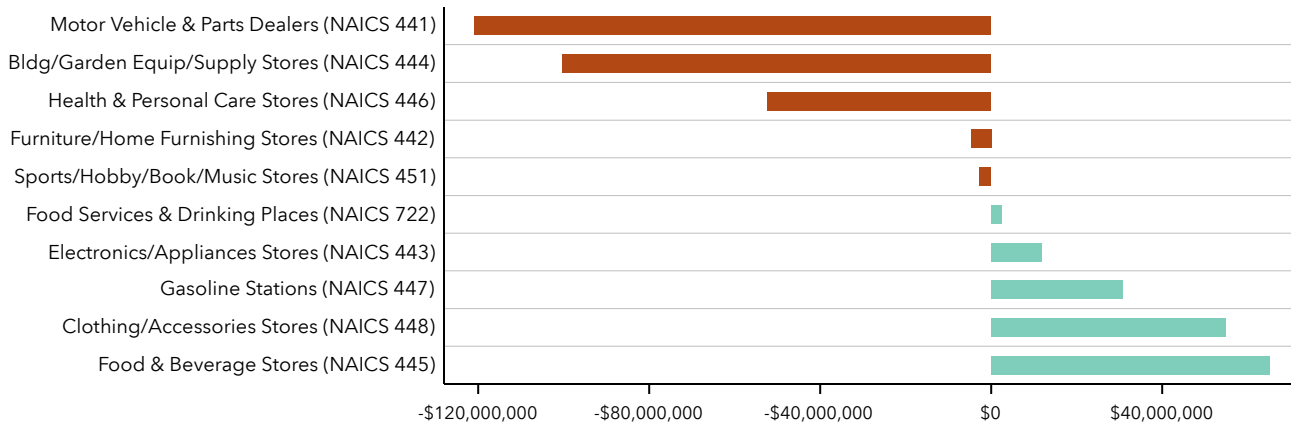
| Summary Information | 2022 | 2027 |
|--------------------------|----------|----------|
| Population | 136,023 | 139,230 |
| Households | 51,212 | 52,925 |
| Families | 94,637 | 96,650 |
| Average Household Size | 2.47 | 2.45 |
| Median Household Income | \$51,688 | \$56,745 |
| Average Household Income | \$69,497 | \$79,916 |
| Per Capita Income | \$26,510 | \$30,735 |
| Median Age | 32.4 | 33.6 |



| Industry Summary | NAICS Code | Demand (Retail Potential) | Supply (Retail Sales) | Retail Gap Leakage(+) Surplus(-) | No. of Businesses |
|---------------------------------|------------|------------------------------|--------------------------|---------------------------------------|-------------------|
| Total Retail Trade | 44-45 | \$980,067,834 | \$1,104,397,000 | -\$124,329,166 | 691 |
| Total Food/Drink | 722 | \$161,827,769 | \$159,393,000 | \$2,434,769 | 216 |
| Total Retail Sales & Food/Drink | 44-45, 722 | \$1,141,895,603 | \$1,263,790,000 | -\$121,894,397 | 907 |

| Industry Groups | NAICS Code | Demand (Retail Potential) | Supply (Retail Sales) | Retail Gap Leakage(+) Surplus(-) | No. of Businesses |
|----------------------------------|------------|------------------------------|--------------------------|---------------------------------------|-------------------|
| Motor Vehicle & Parts Dealers | 441 | \$121,290,385 | \$242,158,000 | -\$120,867,615 | 94 |
| Furniture/Home Furnishing Stores | 442 | \$26,579,173 | \$31,331,000 | -\$4,751,827 | 32 |
| Electronics/Appliances Stores | 443 | \$26,388,188 | \$14,535,000 | \$11,853,188 | 18 |
| Bldg/Garden Equip/Supply Stores | 444 | \$48,855,650 | \$149,194,000 | -\$100,338,350 | 46 |
| Food & Beverage Stores | 445 | \$238,778,793 | \$173,542,000 | \$65,236,793 | 129 |
| Health & Personal Care Stores | 446 | \$34,667,097 | \$87,022,000 | -\$52,354,903 | 51 |
| Gasoline Stations | 447 | \$108,735,069 | \$78,032,000 | \$30,703,069 | 39 |
| Clothing/Accessories Stores | 448 | \$83,617,221 | \$28,703,000 | \$54,914,221 | 56 |
| Sports/Hobby/Book/Music Stores | 451 | \$17,175,291 | \$19,937,000 | -\$2,761,709 | 30 |
| Food Services & Drinking Places | 722 | \$161,827,769 | \$159,393,000 | \$2,434,769 | 216 |

Leakage/Surplus (Retail Gap) by Retail Type



Source: U.S. Census Bureau, Decennial Census 2020 and ACS 2016-2020.
Esri forecasts for 2022 and 2027



Retail Leakage/Surplus Report

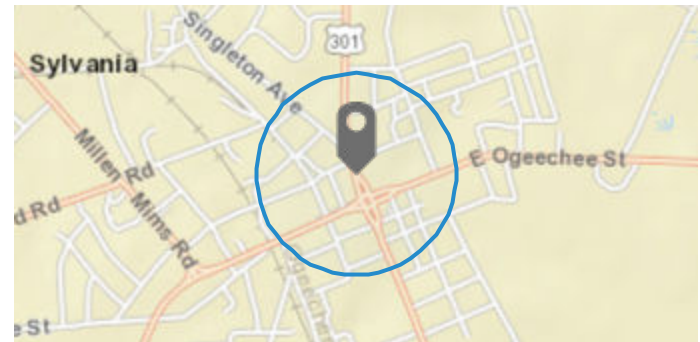
N Main St, Sylvania, Georgia, 30467

Ring of 0.25 miles

32.75143

-81.63685

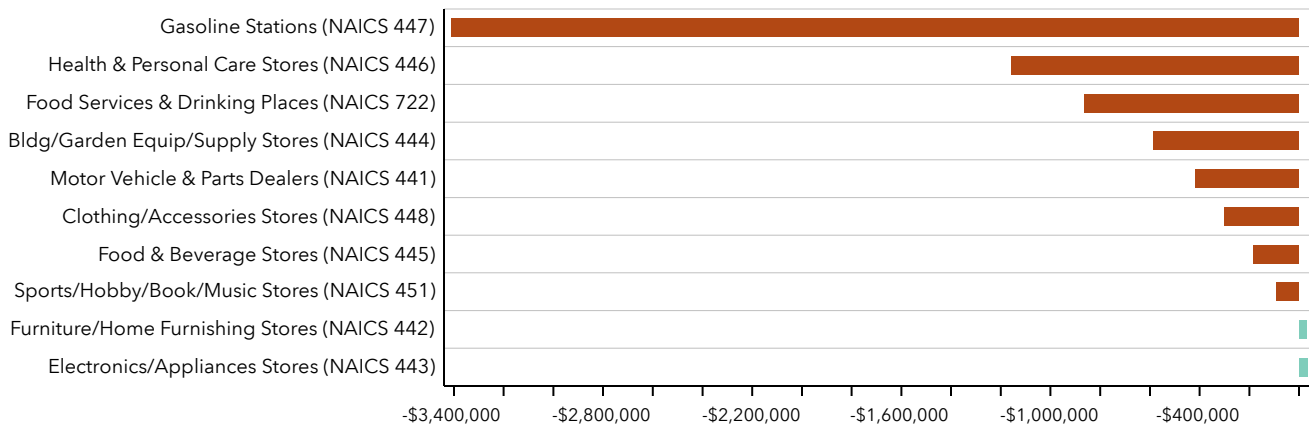
| Summary Information | 2023 | 2028 |
|--------------------------|----------|----------|
| Population | 212 | 205 |
| Households | 89 | 87 |
| Families | 169 | 162 |
| Average Household Size | 2.36 | 2.33 |
| Median Household Income | \$27,646 | \$28,727 |
| Average Household Income | \$39,888 | \$44,540 |
| Per Capita Income | \$16,522 | \$18,677 |
| Median Age | 37.9 | 40.2 |



| Industry Summary | NAICS Code | Demand (Retail Potential) | Supply (Retail Sales) | Retail Gap Leakage(+) Surplus(-) | No. of Businesses |
|---------------------------------|------------|------------------------------|--------------------------|---------------------------------------|-------------------|
| Total Retail Trade | 44-45 | \$1,130,512 | \$7,168,761 | -\$6,038,249 | 9 |
| Total Food/Drink | 722 | \$133,018 | \$995,004 | -\$861,986 | 2 |
| Total Retail Sales & Food/Drink | 44-45, 722 | \$1,263,530 | \$8,163,765 | -\$6,900,235 | 11 |

| Industry Groups | NAICS Code | Demand (Retail Potential) | Supply (Retail Sales) | Retail Gap Leakage(+) Surplus(-) | No. of Businesses |
|----------------------------------|------------|------------------------------|--------------------------|---------------------------------------|-------------------|
| Motor Vehicle & Parts Dealers | 441 | \$137,943 | \$553,506 | -\$415,563 | 1 |
| Furniture/Home Furnishing Stores | 442 | \$31,923 | \$0 | \$31,923 | 0 |
| Electronics/Appliances Stores | 443 | \$34,440 | \$0 | \$34,440 | 0 |
| Bldg/Garden Equip/Supply Stores | 444 | \$72,248 | \$656,810 | -\$584,562 | 1 |
| Food & Beverage Stores | 445 | \$280,276 | \$463,195 | -\$182,919 | 2 |
| Health & Personal Care Stores | 446 | \$30,178 | \$1,185,888 | -\$1,155,710 | 1 |
| Gasoline Stations | 447 | \$121,360 | \$3,532,755 | -\$3,411,395 | 1 |
| Clothing/Accessories Stores | 448 | \$68,822 | \$368,873 | -\$300,051 | 2 |
| Sports/Hobby/Book/Music Stores | 451 | \$19,830 | \$110,589 | -\$90,759 | 1 |
| Food Services & Drinking Places | 722 | \$133,018 | \$995,004 | -\$861,986 | 2 |

Leakage/Surplus (Retail Gap) by Retail Type



Source: U.S. Census Bureau, Decennial Census 2020 and ACS 2017-2021.
Esri forecasts for 2023 and 2028

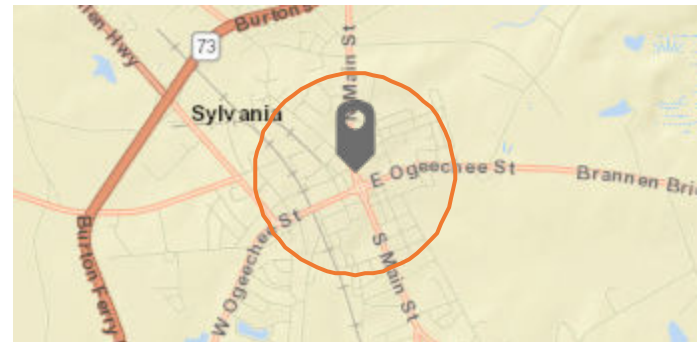


Retail Leakage/Surplus Report

N Main St, Sylvania, Georgia, 30467
 Ring of 0.5 miles

32.75143
 -81.63685

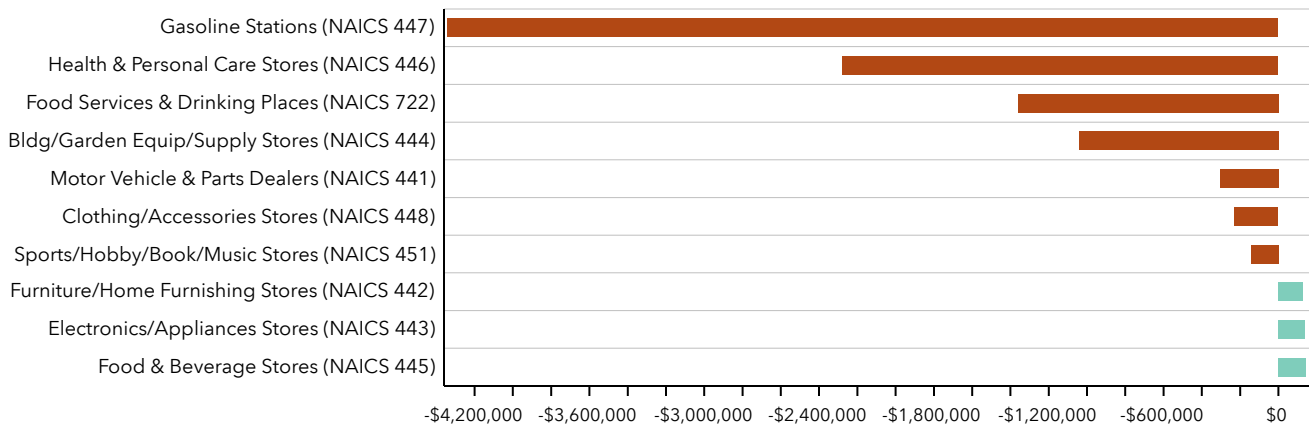
| Summary Information | 2023 | 2028 |
|--------------------------|----------|----------|
| Population | 792 | 769 |
| Households | 322 | 315 |
| Families | 631 | 610 |
| Average Household Size | 2.44 | 2.42 |
| Median Household Income | \$29,191 | \$30,197 |
| Average Household Income | \$45,636 | \$51,725 |
| Per Capita Income | \$18,795 | \$21,441 |
| Median Age | 38.6 | 40.6 |



| Industry Summary | NAICS Code | Demand (Retail Potential) | Supply (Retail Sales) | Retail Gap Leakage(+) Surplus(-) | No. of Businesses |
|---------------------------------|------------|------------------------------|--------------------------|---------------------------------------|-------------------|
| Total Retail Trade | 44-45 | \$4,587,492 | \$11,751,444 | -\$7,163,952 | 16 |
| Total Food/Drink | 722 | \$543,553 | \$1,905,496 | -\$1,361,943 | 4 |
| Total Retail Sales & Food/Drink | 44-45, 722 | \$5,131,045 | \$13,656,940 | -\$8,525,895 | 20 |

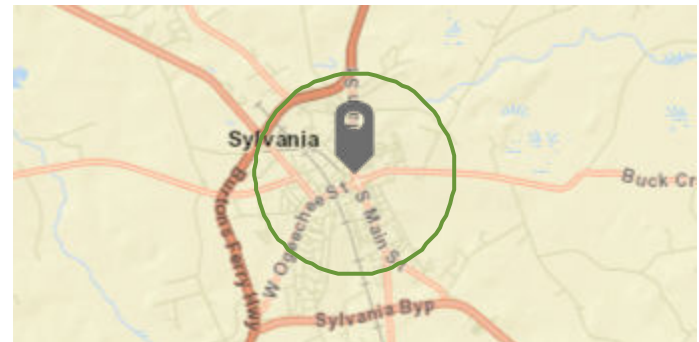
| Industry Groups | NAICS Code | Demand (Retail Potential) | Supply (Retail Sales) | Retail Gap Leakage(+) Surplus(-) | No. of Businesses |
|----------------------------------|------------|------------------------------|--------------------------|---------------------------------------|-------------------|
| Motor Vehicle & Parts Dealers | 441 | \$554,811 | \$860,438 | -\$305,627 | 2 |
| Furniture/Home Furnishing Stores | 442 | \$128,933 | \$0 | \$128,933 | 0 |
| Electronics/Appliances Stores | 443 | \$139,944 | \$0 | \$139,944 | 0 |
| Bldg/Garden Equip/Supply Stores | 444 | \$287,743 | \$1,330,039 | -\$1,042,296 | 1 |
| Food & Beverage Stores | 445 | \$1,138,988 | \$993,710 | \$145,278 | 3 |
| Health & Personal Care Stores | 446 | \$124,204 | \$2,401,421 | -\$2,277,217 | 1 |
| Gasoline Stations | 447 | \$484,876 | \$4,826,275 | -\$4,341,399 | 2 |
| Clothing/Accessories Stores | 448 | \$284,463 | \$513,902 | -\$229,439 | 2 |
| Sports/Hobby/Book/Music Stores | 451 | \$81,675 | \$223,942 | -\$142,267 | 3 |
| Food Services & Drinking Places | 722 | \$543,553 | \$1,905,496 | -\$1,361,943 | 4 |

Leakage/Surplus (Retail Gap) by Retail Type



Source: U.S. Census Bureau, Decennial Census 2020 and ACS 2017-2021.
 Esri forecasts for 2023 and 2028

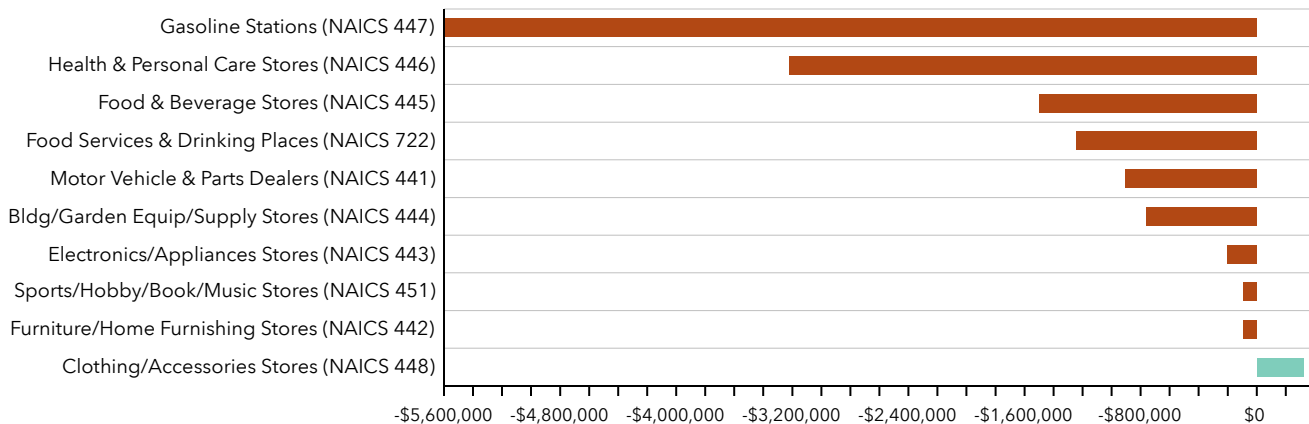
| Summary Information | 2023 | 2028 |
|--------------------------|----------|----------|
| Population | 2,223 | 2,174 |
| Households | 945 | 933 |
| Families | 1,773 | 1,728 |
| Average Household Size | 2.34 | 2.31 |
| Median Household Income | \$31,213 | \$33,150 |
| Average Household Income | \$52,507 | \$59,995 |
| Per Capita Income | \$22,171 | \$25,550 |
| Median Age | 39.4 | 41.0 |



| Industry Summary | NAICS Code | Demand (Retail Potential) | Supply (Retail Sales) | Retail Gap Leakage(+) Surplus(-) | No. of Businesses |
|---------------------------------|------------|------------------------------|--------------------------|---------------------------------------|-------------------|
| Total Retail Trade | 44-45 | \$15,431,364 | \$24,921,049 | -\$9,489,685 | 28 |
| Total Food/Drink | 722 | \$1,834,103 | \$3,079,109 | -\$1,245,006 | 7 |
| Total Retail Sales & Food/Drink | 44-45, 722 | \$17,265,467 | \$28,000,158 | -\$10,734,691 | 35 |

| Industry Groups | NAICS Code | Demand (Retail Potential) | Supply (Retail Sales) | Retail Gap Leakage(+) Surplus(-) | No. of Businesses |
|----------------------------------|------------|------------------------------|--------------------------|---------------------------------------|-------------------|
| Motor Vehicle & Parts Dealers | 441 | \$1,858,806 | \$2,763,804 | -\$904,998 | 4 |
| Furniture/Home Furnishing Stores | 442 | \$432,792 | \$523,894 | -\$91,102 | 1 |
| Electronics/Appliances Stores | 443 | \$471,027 | \$677,982 | -\$206,955 | 1 |
| Bldg/Garden Equip/Supply Stores | 444 | \$959,711 | \$1,724,122 | -\$764,411 | 2 |
| Food & Beverage Stores | 445 | \$3,833,820 | \$5,332,596 | -\$1,498,776 | 6 |
| Health & Personal Care Stores | 446 | \$420,426 | \$3,638,614 | -\$3,218,188 | 2 |
| Gasoline Stations | 447 | \$1,619,571 | \$7,212,358 | -\$5,592,787 | 3 |
| Clothing/Accessories Stores | 448 | \$964,707 | \$644,528 | \$320,179 | 3 |
| Sports/Hobby/Book/Music Stores | 451 | \$276,562 | \$371,361 | -\$94,799 | 4 |
| Food Services & Drinking Places | 722 | \$1,834,103 | \$3,079,109 | -\$1,245,006 | 7 |

Leakage/Surplus (Retail Gap) by Retail Type



Source: U.S. Census Bureau, Decennial Census 2020 and ACS 2017-2021.
Esri forecasts for 2023 and 2028



LifeMode Group: Family Landscapes
Middleburg

4C

Households: 3,511,200

Average Household Size: 2.75

Median Age: 36.1

Median Household Income: \$59,800

WHO ARE WE?

Middleburg neighborhoods transformed from the easy pace of country living to semirural subdivisions in the last decade, when the housing boom reached out. Residents are conservative, family-oriented consumers. Still more country than rock and roll, they are thrifty but willing to carry some debt and are already investing in their futures. They rely on their smartphones and mobile devices to stay in touch and pride themselves on their expertise. They prefer to buy American and travel in the US. This market is younger but growing in size and assets.

OUR NEIGHBORHOOD

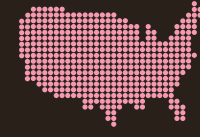
- Semirural locales within metropolitan areas.
- Neighborhoods changed rapidly in the previous decade with the addition of new single-family homes.
- Include a number of mobile homes (Index 150).
- Affordable housing, median value of \$175,000 (Index 84) with a low vacancy rate.
- Young couples, many with children; average household size is 2.75.

SOCIOECONOMIC TRAITS

- Education: 65% with a high school diploma or some college.
- Unemployment rate lower at 4.7% (Index 86).
- Labor force participation typical of a younger population at 66.7% (Index 107).
- Traditional values are the norm here—faith, country, and family.
- Prefer to buy American and for a good price.
- Comfortable with the latest in technology, for convenience (online banking or saving money on landlines) and entertainment.



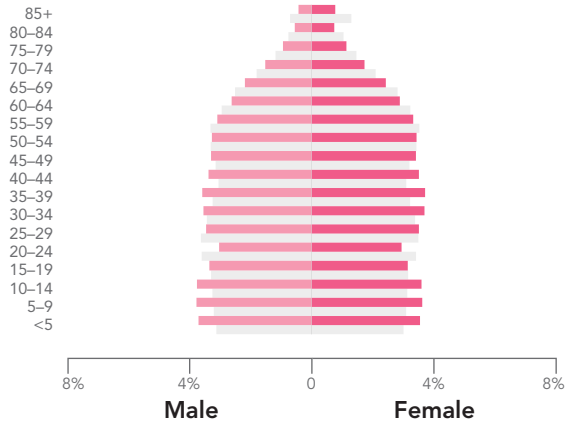
Note: The Index represents the ratio of the segment rate to the US rate multiplied by 100. Consumer preferences are estimated from data by GfK MRI.



AGE BY SEX (Esri data)

Median Age: **36.1** US: 38.2

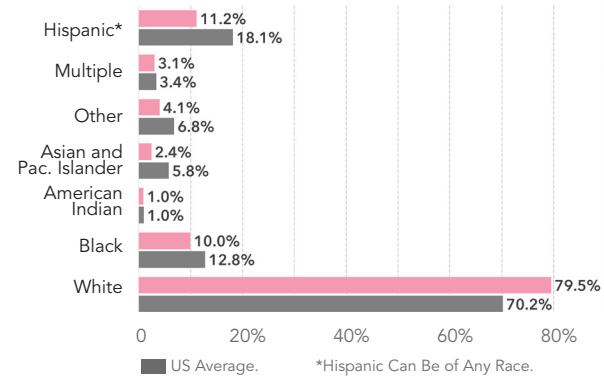
■ Indicates US



RACE AND ETHNICITY (Esri data)

The Diversity Index summarizes racial and ethnic diversity. The index shows the likelihood that two persons, chosen at random from the same area, belong to different race or ethnic groups. The index ranges from 0 (no diversity) to 100 (complete diversity).

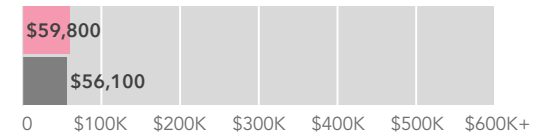
Diversity Index: **48.5** US: 64.0



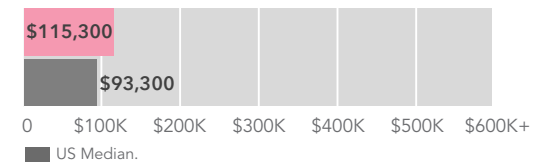
INCOME AND NET WORTH

Net worth measures total household assets (homes, vehicles, investments, etc.) less any debts, secured (e.g., mortgages) or unsecured (credit cards). Household income and net worth are estimated by Esri.

Median Household Income

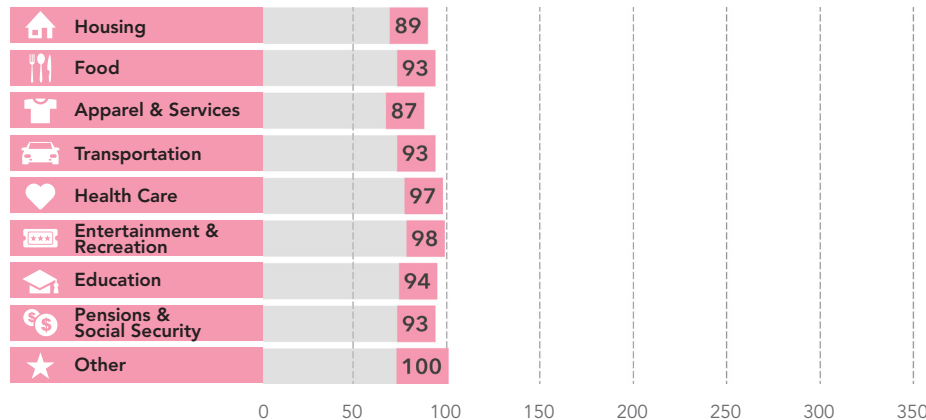


Median Net Worth



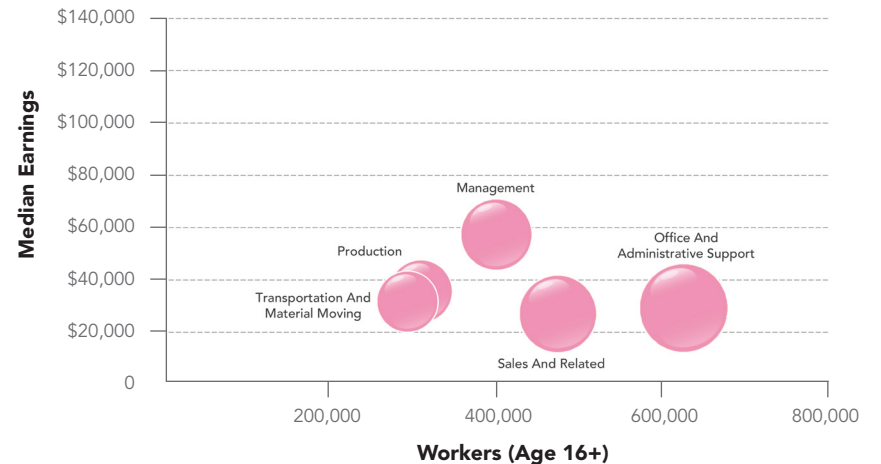
AVERAGE HOUSEHOLD BUDGET INDEX

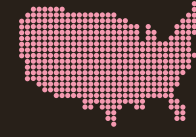
The index compares the average amount spent in this market's household budgets for housing, food, apparel, etc., to the average amount spent by all US households. An index of 100 is average. An index of 120 shows that average spending by consumers in this market is 20 percent above the national average. Consumer expenditures are estimated by Esri.



OCCUPATION BY EARNINGS

The five occupations with the highest number of workers in the market are displayed by median earnings. Data from the Census Bureau's American Community Survey.





MARKET PROFILE (Consumer preferences are estimated from data by GfK MRI)

- Residents are partial to domestic vehicles; they like to drive trucks, SUVs, or motorcycles.
- Entertainment is primarily family-oriented, TV and movie rentals or theme parks and family restaurants.
- Spending priorities also focus on family (children’s toys and apparel) or home DIY projects.
- Sports include hunting, fishing, bowling, and baseball.
- TV and magazines provide entertainment and information.
- Media preferences include country and Christian channels.

HOUSING

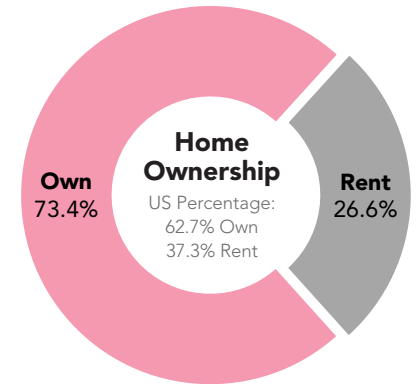
Median home value is displayed for markets that are primarily owner occupied; average rent is shown for renter-occupied markets. Tenure and home value are estimated by Esri. Housing type and average rent are from the Census Bureau’s American Community Survey.



Typical Housing:
Single Family

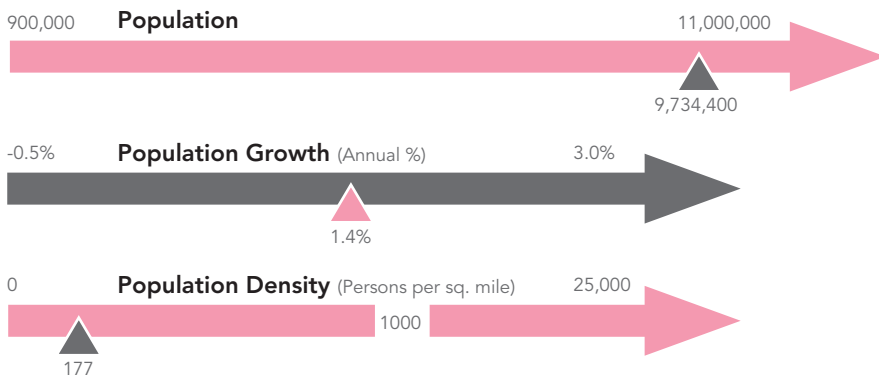
Median Value:
\$175,000

US Median: \$207,300



POPULATION CHARACTERISTICS

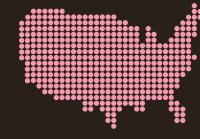
Total population, average annual population change since Census 2010, and average density (population per square mile) are displayed for the market relative to the size and change among all Tapestry markets. Data estimated by Esri.



ESRI INDEXES

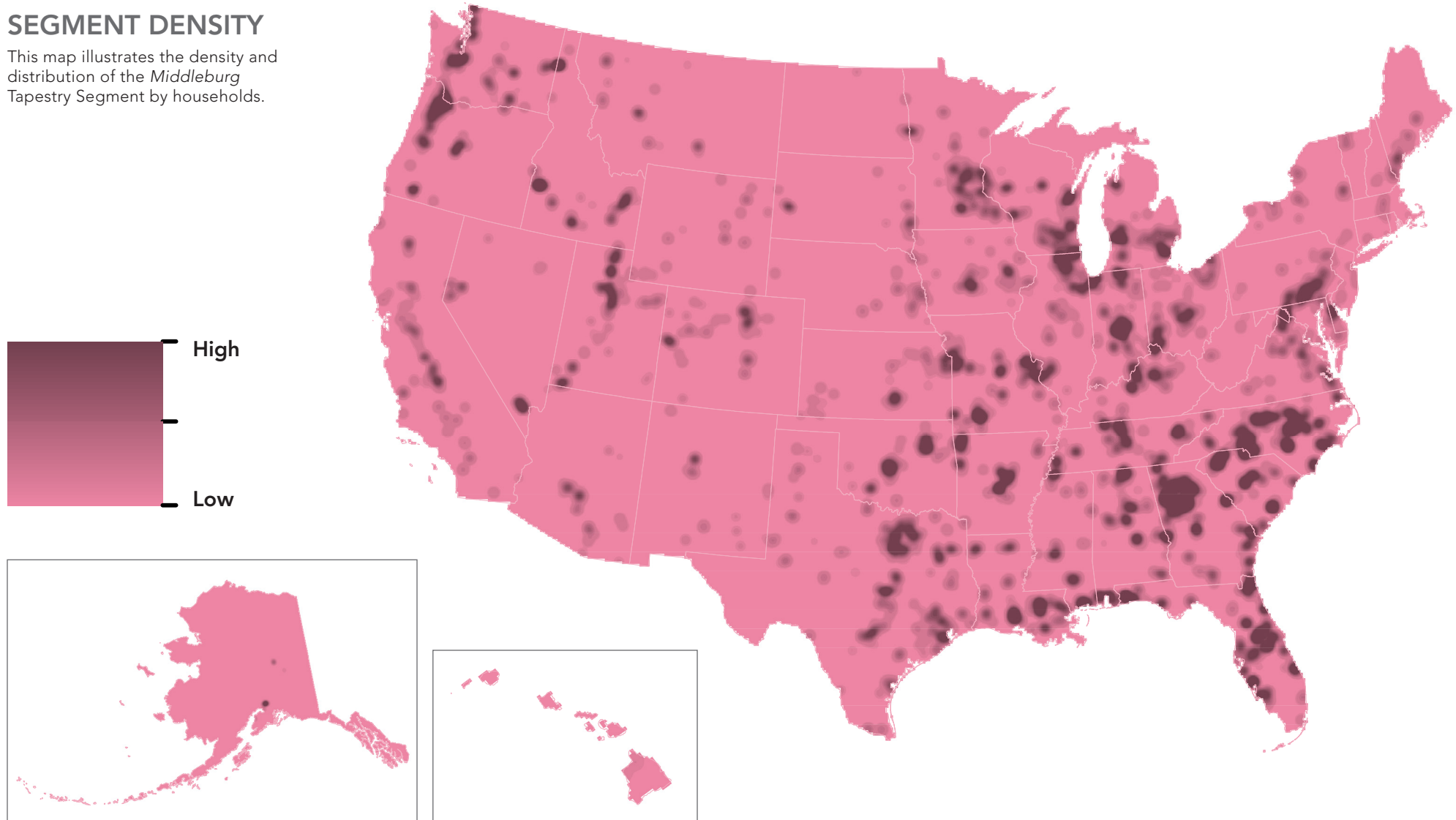
Esri developed three indexes to display average household wealth, socioeconomic status, and housing affordability for the market relative to US standards.





SEGMENT DENSITY

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



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LifeMode Group: Rustic Outposts

Southern Satellites

10A

Households: 3,856,800

Average Household Size: 2.67

Median Age: 40.3

Median Household Income: \$47,800

WHO ARE WE?

Southern Satellites is the second largest market found in rural settlements but within metropolitan areas located primarily in the South. This market is typically slightly older, settled married-couple families, who own their homes. Two-thirds of the homes are single-family structures; almost a third are mobile homes. Median household income and home value are below average. Workers are employed in a variety of industries, such as manufacturing, health care, retail trade, and construction, with higher proportions in mining and agriculture than the US. Residents enjoy country living, preferring outdoor activities and DIY home projects.

OUR NEIGHBORHOOD

- About 78% of households are owned.
- Married couples with no children are the dominant household type, with a number of multigenerational households (Index 112).
- Most are single-family homes (67%), with a number of mobile homes (Index 509).
- Most housing units were built in 1970 or later.
- Most households own one or two vehicles, but owning more than three vehicles is common (Index 144).

SOCIOECONOMIC TRAITS

- Education: almost 40% have a high school diploma only (Index 140); 45% have college education (Index 73).
- Labor force participation rate is 59.1%, slightly lower than the US.
- These consumers are more concerned about cost rather than quality or brand loyalty.
- They tend to be somewhat late in adapting to technology.
- They obtain a disproportionate amount of their information from TV, compared to other media.

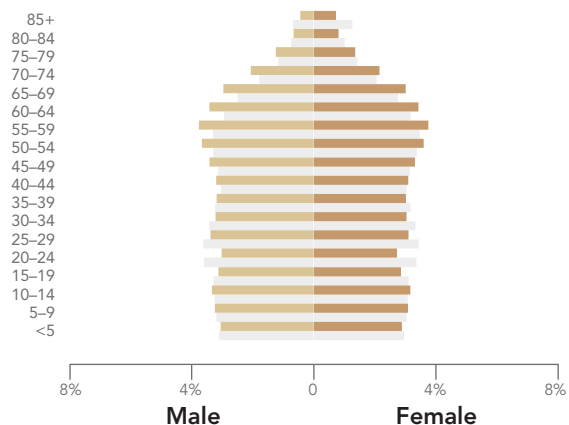


Note: The Index represents the ratio of the segment rate to the US rate multiplied by 100. Consumer preferences are estimated from data by MRI-Simmons.

AGE BY SEX (Esri data)

Median Age: **40.3** US: 38.2

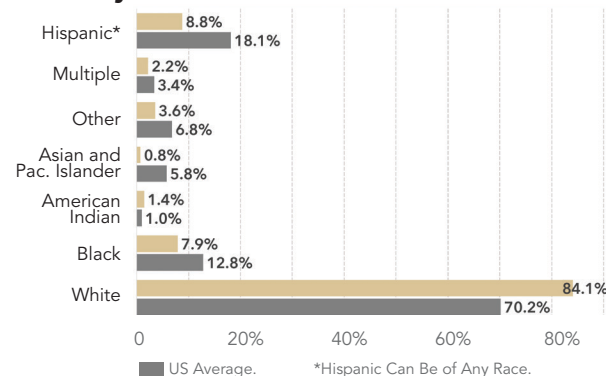
■ Indicates US



RACE AND ETHNICITY (Esri data)

The Diversity Index summarizes racial and ethnic diversity. The index shows the likelihood that two persons, chosen at random from the same area, belong to different race or ethnic groups. The index ranges from 0 (no diversity) to 100 (complete diversity).

Diversity Index: **40.1** US: 64.0



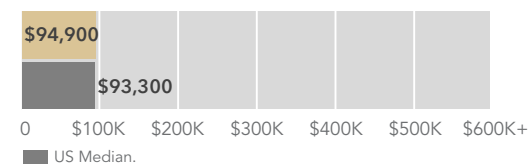
INCOME AND NET WORTH

Net worth measures total household assets (homes, vehicles, investments, etc.) less any debts, secured (e.g., mortgages) or unsecured (credit cards). Household income and net worth are estimated by Esri.

Median Household Income

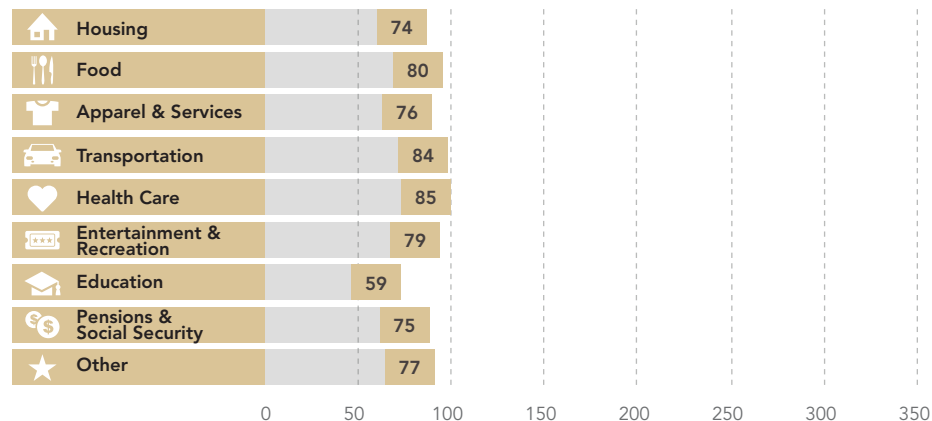


Median Net Worth



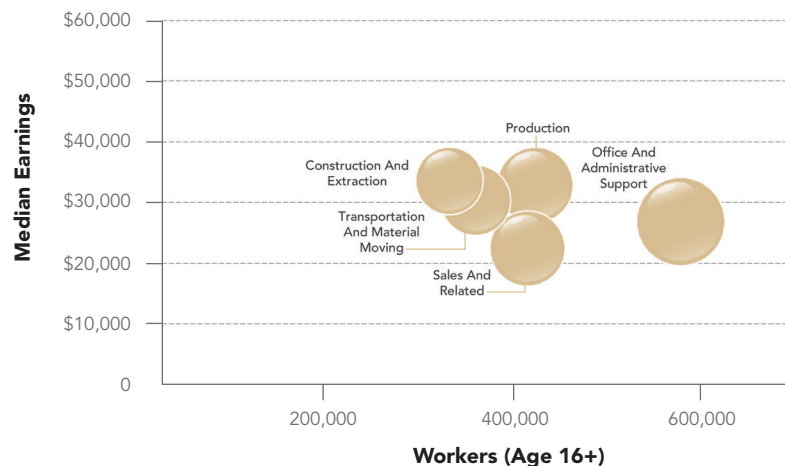
AVERAGE HOUSEHOLD BUDGET INDEX

The index compares the average amount spent in this market's household budgets for housing, food, apparel, etc., to the average amount spent by all US households. An index of 100 is average. An index of 120 shows that average spending by consumers in this market is 20 percent above the national average. Consumer expenditures are estimated by Esri.



OCCUPATION BY EARNINGS

The five occupations with the highest number of workers in the market are displayed by median earnings. Data from the Census Bureau's American Community Survey.



MARKET PROFILE (Consumer preferences are estimated from data by MRI-Simmons.)

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

HOUSING

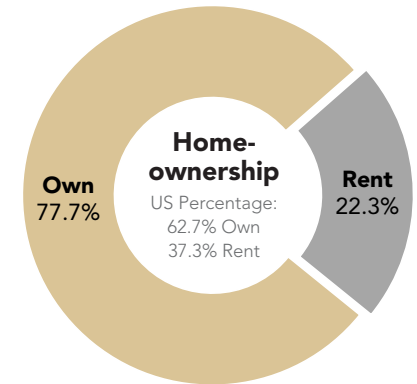
Median home value is displayed for markets that are primarily owner occupied; average rent is shown for renter-occupied markets. Tenure and home value are estimated by Esri. Housing type and average rent are from the Census Bureau's American Community Survey.



Typical Housing:
 Single Family;
 Mobile Homes

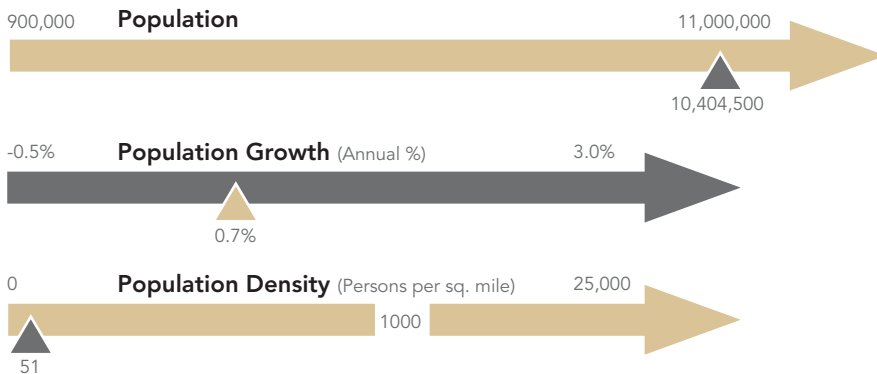
Median Value:
 \$128,500

US Median: \$207,300



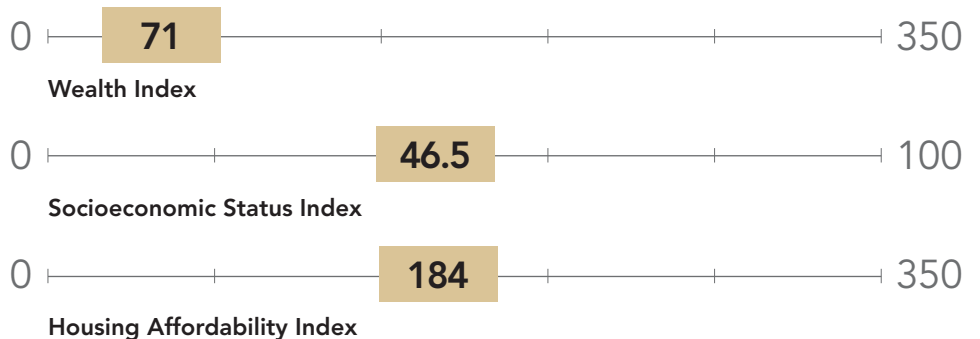
POPULATION CHARACTERISTICS

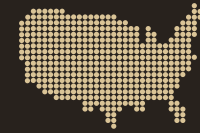
Total population, average annual population change since Census 2010, and average density (population per square mile) are displayed for the market relative to the size and change among all Tapestry markets. Data estimated by Esri.



ESRI INDEXES

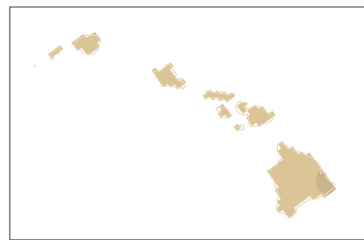
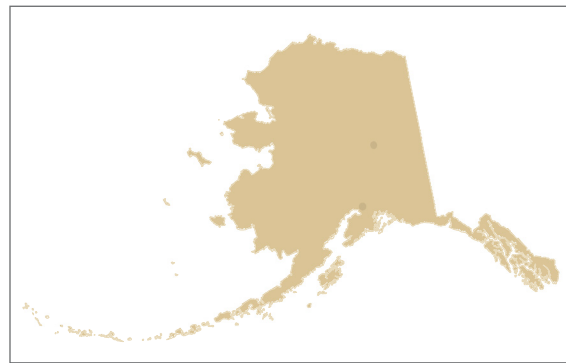
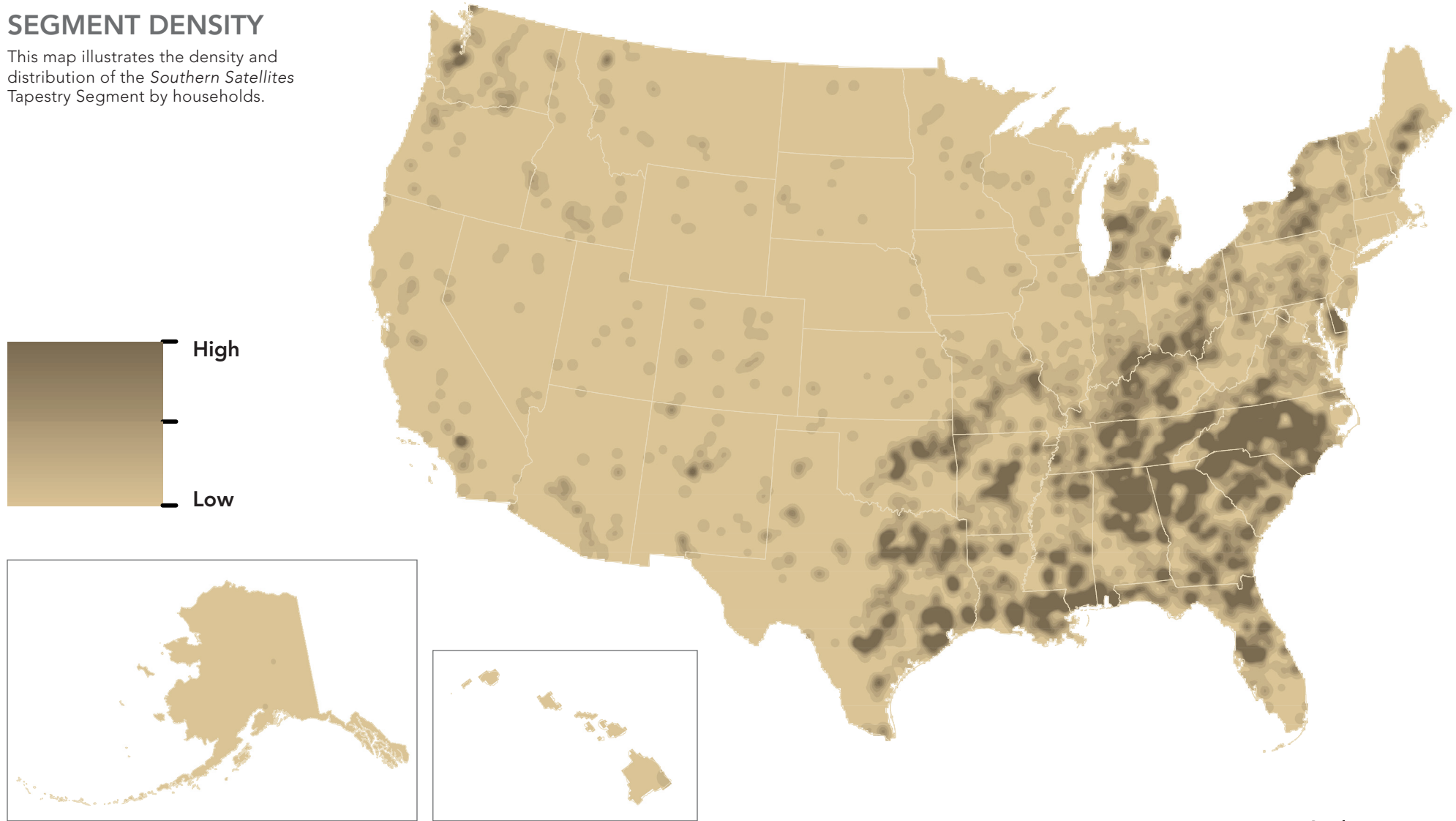
Esri developed three indexes to display average household wealth, socioeconomic status, and housing affordability for the market relative to US standards.





SEGMENT DENSITY

This map illustrates the density and distribution of the *Southern Satellites* Tapestry Segment by households.





LifeMode Group: Rustic Outposts

Rooted Rural

10B

Households: 2,430,900

Average Household Size: 2.48

Median Age: 45.2

Median Household Income: \$42,300

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. 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 and family history.

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 (24%).
- Nearly one in five housing units is 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

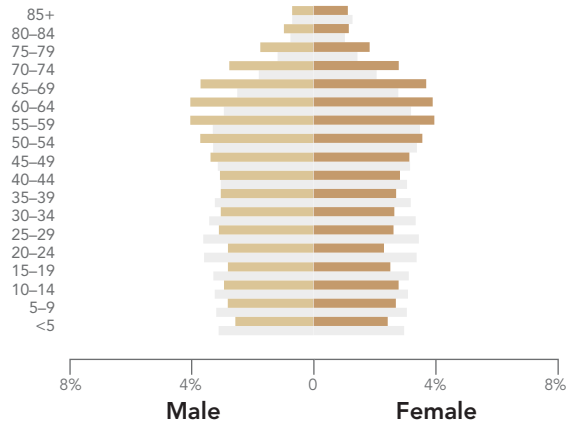
- Shoppers use coupons frequently and buy generic goods.
- Do-it-yourself mentality; grow their own produce and work on their cars and ATVs.
- Pay bills in person and avoid using the internet for financial transactions.
- Often find computers and cell phones too complicated and confusing.
- Clothes a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



AGE BY SEX (Esri data)

Median Age: **45.2** US: 38.2

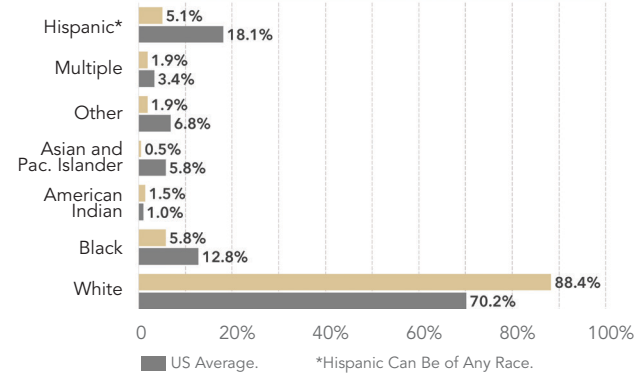
■ Indicates US



RACE AND ETHNICITY (Esri data)

The Diversity Index summarizes racial and ethnic diversity. The index shows the likelihood that two persons, chosen at random from the same area, belong to different race or ethnic groups. The index ranges from 0 (no diversity) to 100 (complete diversity).

Diversity Index: **29.2** US: 64.0



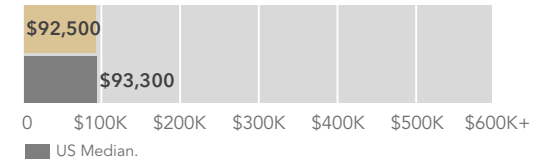
INCOME AND NET WORTH

Net worth measures total household assets (homes, vehicles, investments, etc.) less any debts, secured (e.g., mortgages) or unsecured (credit cards). Household income and net worth are estimated by Esri.

Median Household Income

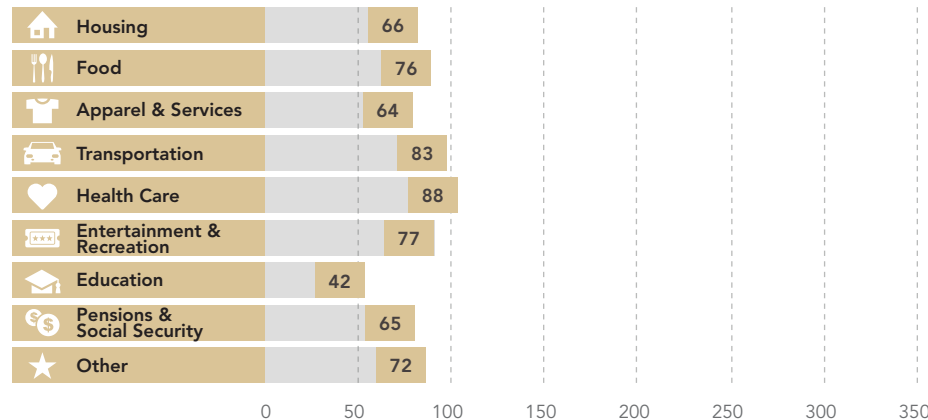


Median Net Worth



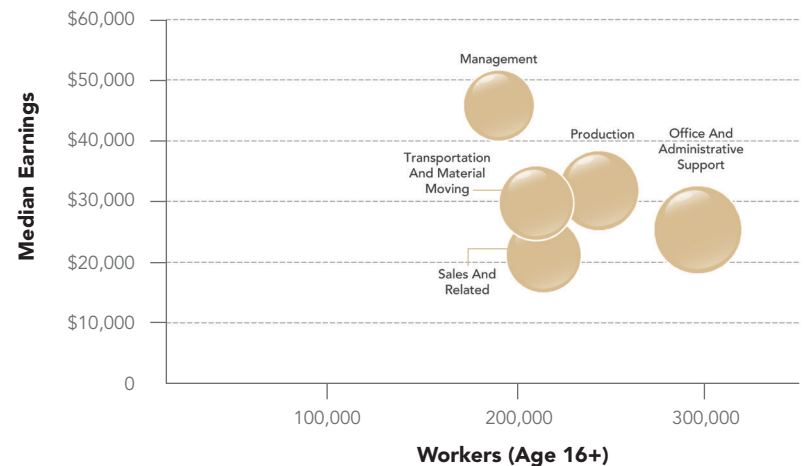
AVERAGE HOUSEHOLD BUDGET INDEX

The index compares the average amount spent in this market's household budgets for housing, food, apparel, etc., to the average amount spent by all US households. An index of 100 is average. An index of 120 shows that average spending by consumers in this market is 20 percent above the national average. Consumer expenditures are estimated by Esri.



OCCUPATION BY EARNINGS

The five occupations with the highest number of workers in the market are displayed by median earnings. Data from the Census Bureau's American Community Survey.





MARKET PROFILE (Consumer preferences are estimated from data by MRI-Simmons.)

- They own a riding lawn mower, as well as a garden tiller, and have vegetable gardens.
- More than half of the households have a high-speed internet connection.
- They use a satellite dish to watch CMT, the History Channel, and GSN.
- Pets are popular—dogs, cats, and birds.
- Leisure activities include hunting and fishing.
- They listen to faith-based radio, country, and gospel music.
- Many are on Medicare and frequent the Walgreens pharmacy.

HOUSING

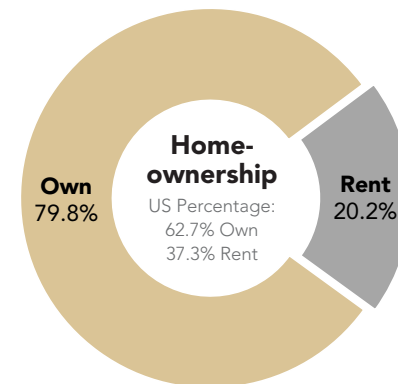
Median home value is displayed for markets that are primarily owner occupied; average rent is shown for renter-occupied markets. Tenure and home value are estimated by Esri. Housing type and average rent are from the Census Bureau's American Community Survey.



Typical Housing:
Single Family;
Mobile Homes

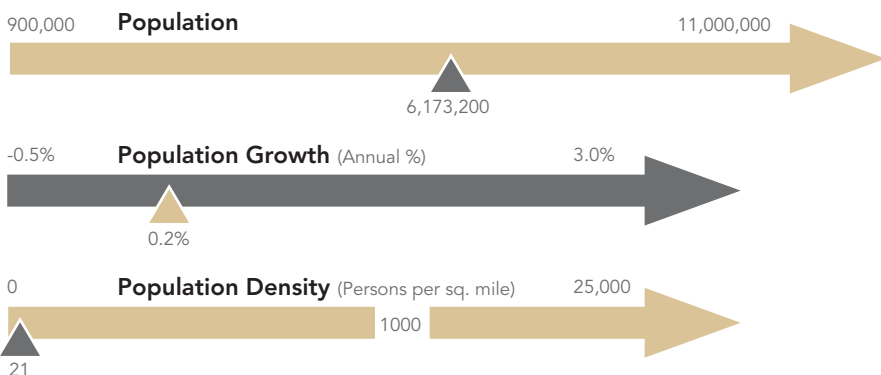
Median Value:
\$112,800

US Median: \$207,300



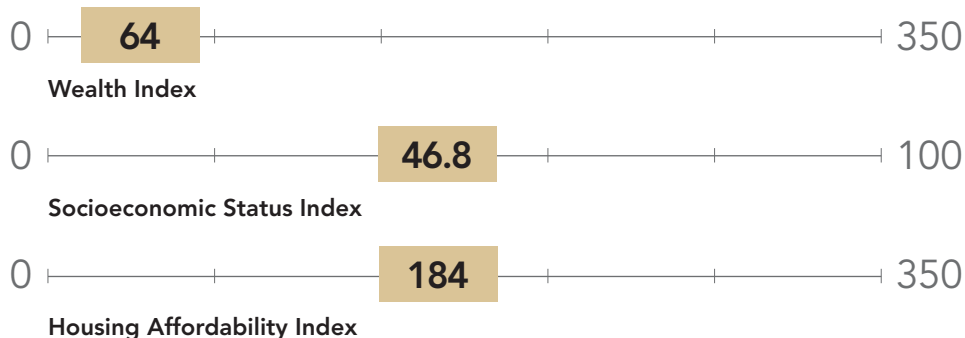
POPULATION CHARACTERISTICS

Total population, average annual population change since Census 2010, and average density (population per square mile) are displayed for the market relative to the size and change among all Tapestry markets. Data estimated by Esri.



ESRI INDEXES

Esri developed three indexes to display average household wealth, socioeconomic status, and housing affordability for the market relative to US standards.

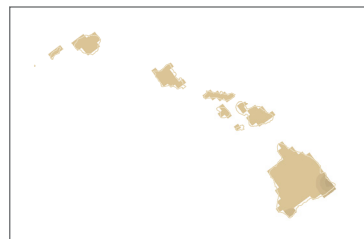
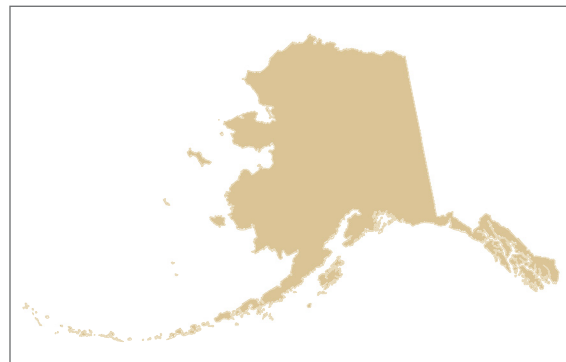
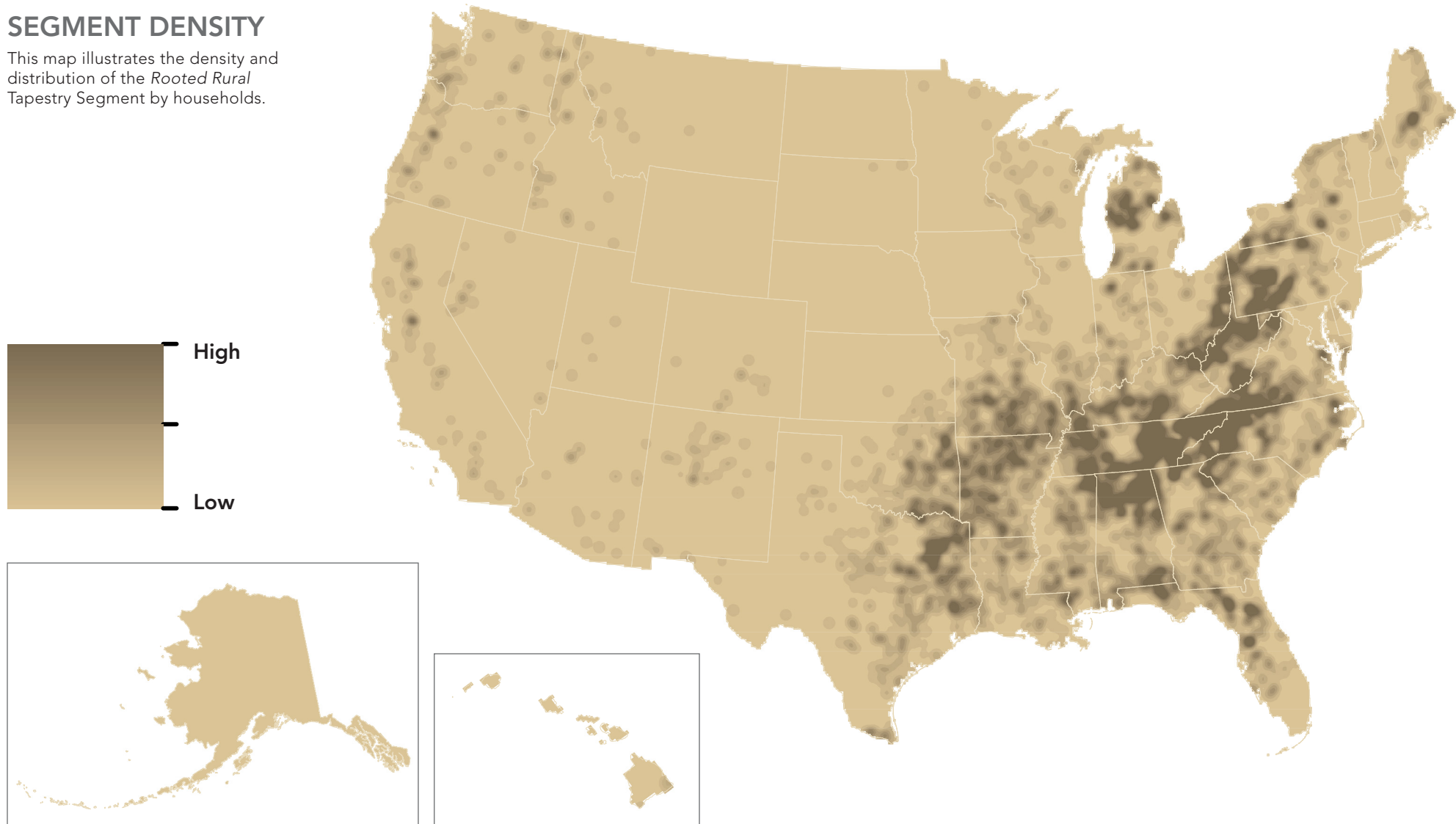


Rooted Rural



SEGMENT DENSITY

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





10E

LifeMode Group: Rustic Outposts

Rural Bypasses

Households: 1,646,400

Average Household Size: 2.55

Median Age: 40.4

Median Household Income: \$33,000

WHO ARE WE?

Open space, undeveloped land, and farmland characterize *Rural Bypasses*. These families live within small towns along country back roads and enjoy the open air in these sparsely populated neighborhoods. Their country lifestyle focuses on the outdoors, gardening, hunting, and fishing. They are more likely to own a satellite dish than a home computer. Although most households do have a connection to the internet, use is very limited. Those who are not yet retired work in blue-collar jobs in the agriculture or manufacturing industries.

OUR NEIGHBORHOOD

- An older market, with more married couples without children and single households, the average household size is slightly lower at 2.55.
- Most residents own single-family homes or mobile homes (Index 504).
- Most housing was built from 1970 to 1989; vacancy rates are higher due to seasonal housing.
- Residents live in very rural areas, almost entirely in the South.

SOCIOECONOMIC TRAITS

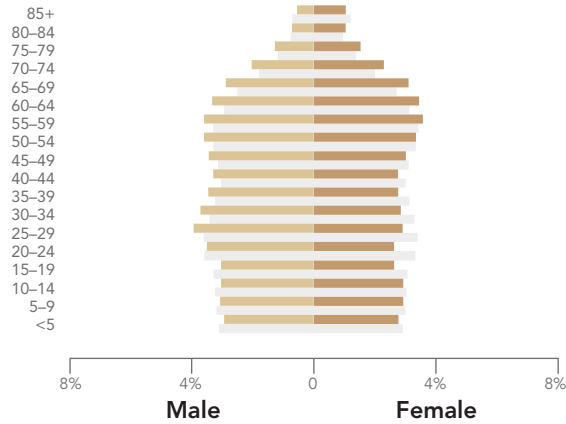
- Almost 25% have not finished high school; 11% have a bachelor's degree or higher.
- Labor force participation is low at 47% (Index 76).
- Income is primarily derived from wages and supplemented with Social Security and Supplemental Security Incomes.
- Religion and faith are central in their lives.
- They rely on television to stay informed.



AGE BY SEX (Esri data)

Median Age: **40.4** US: 38.2

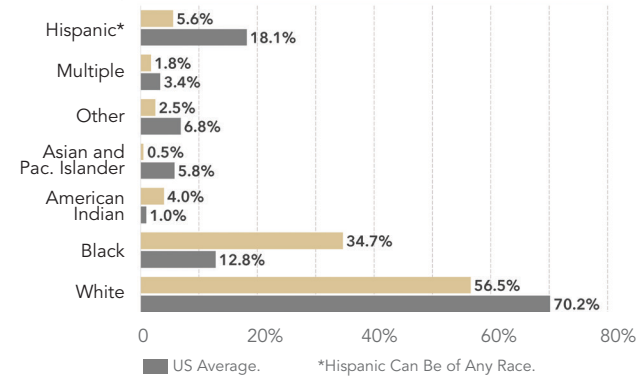
■ Indicates US



RACE AND ETHNICITY (Esri data)

The Diversity Index summarizes racial and ethnic diversity. The index shows the likelihood that two persons, chosen at random from the same area, belong to different race or ethnic groups. The index ranges from 0 (no diversity) to 100 (complete diversity).

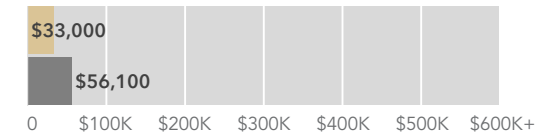
Diversity Index: **60.5** US: 64.0



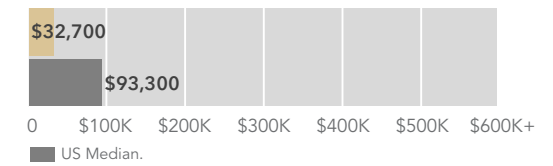
INCOME AND NET WORTH

Net worth measures total household assets (homes, vehicles, investments, etc.) less any debts, secured (e.g., mortgages) or unsecured (credit cards). Household income and net worth are estimated by Esri.

Median Household Income

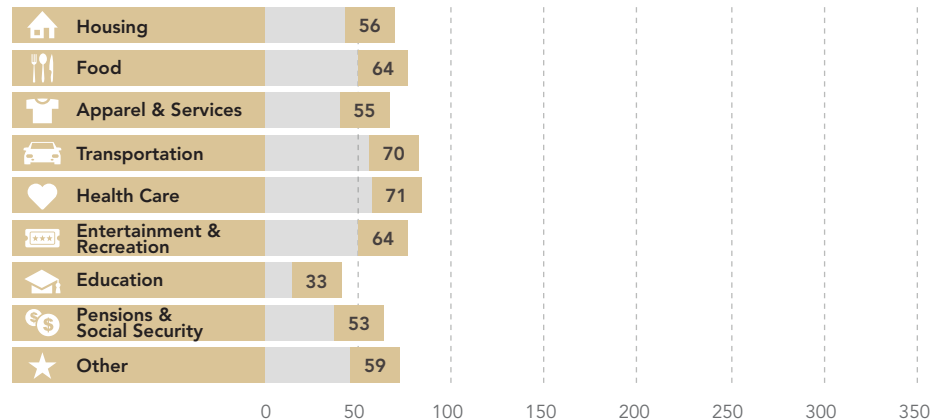


Median Net Worth



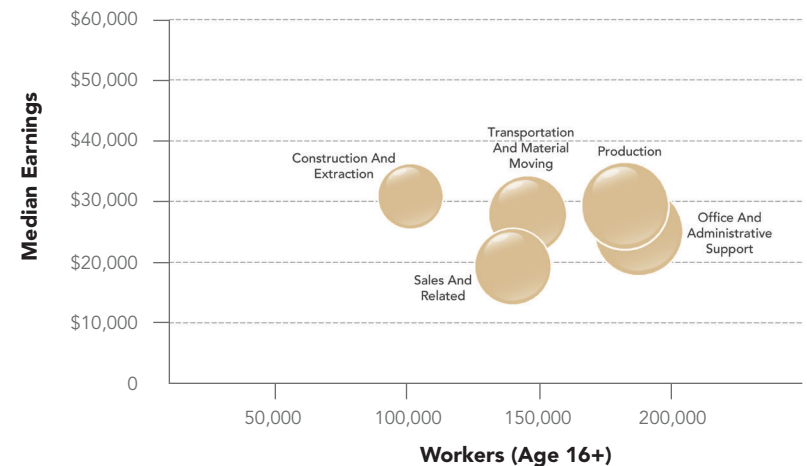
AVERAGE HOUSEHOLD BUDGET INDEX

The index compares the average amount spent in this market's household budgets for housing, food, apparel, etc., to the average amount spent by all US households. An index of 100 is average. An index of 120 shows that average spending by consumers in this market is 20 percent above the national average. Consumer expenditures are estimated by Esri.



OCCUPATION BY EARNINGS

The five occupations with the highest number of workers in the market are displayed by median earnings. Data from the Census Bureau's American Community Survey.





MARKET PROFILE (Consumer preferences are estimated from data by MRI-Simmons.)

- Typical of their country lifestyle, *Rural Bypasses* residents prefer trucks over sedans.
- To save money, households shop at discount department stores, such as Walmart, and warehouse clubs like Sam’s Club.
- Magazines are a popular source of news and entertainment, particularly fishing, hunting, and automotive types.
- As satellite TV subscribers, they regularly watch sports programming as well as their favorite shows on CMT, Freeform, USA Network, and TV Land.

HOUSING

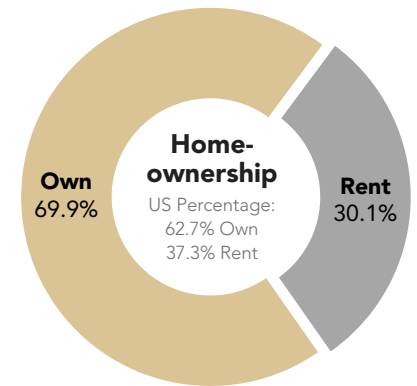
Median home value is displayed for markets that are primarily owner occupied; average rent is shown for renter-occupied markets. Tenure and home value are estimated by Esri. Housing type and average rent are from the Census Bureau’s American Community Survey.



Typical Housing:
Single Family;
Mobile Homes

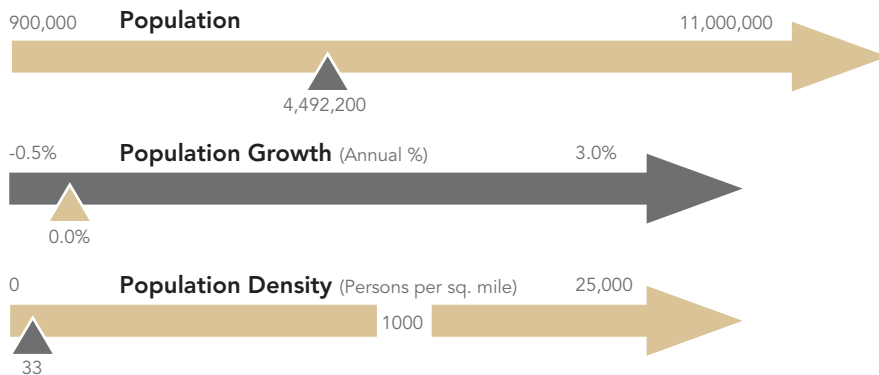
Median Value:
\$83,200

US Median: \$207,300



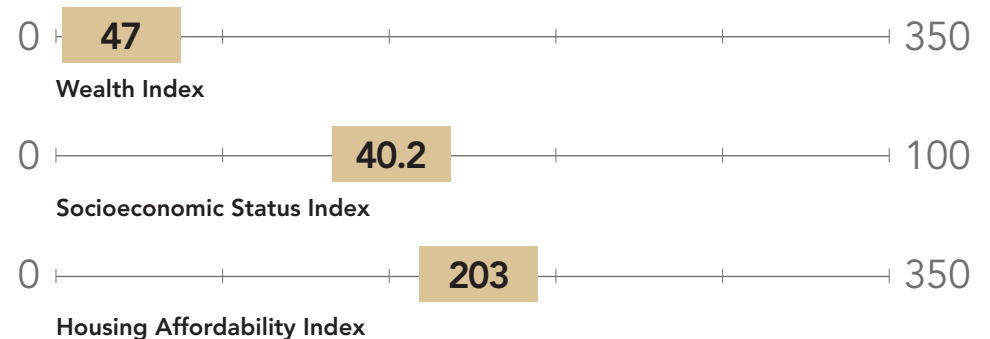
POPULATION CHARACTERISTICS

Total population, average annual population change since Census 2010, and average density (population per square mile) are displayed for the market relative to the size and change among all Tapestry markets. Data estimated by Esri.



ESRI INDEXES

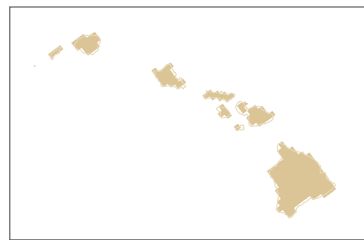
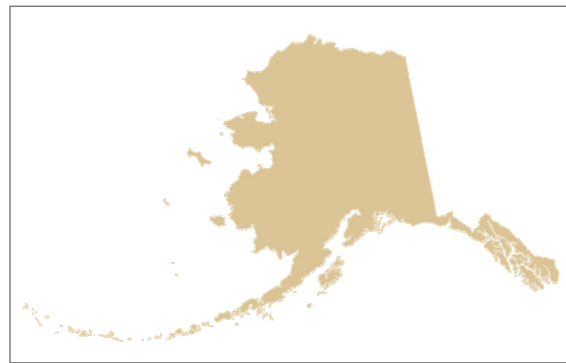
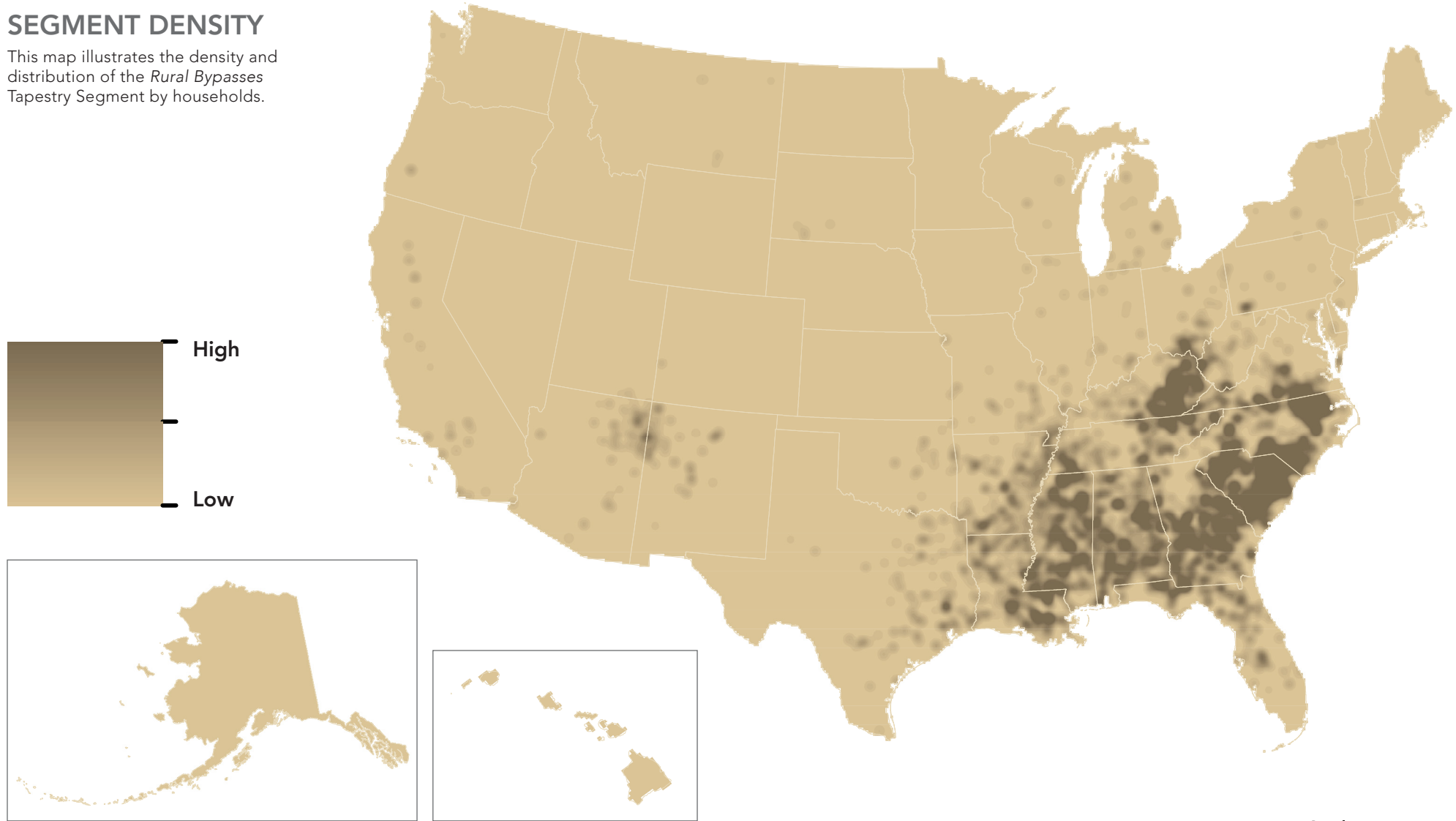
Esri developed three indexes to display average household wealth, socioeconomic status, and housing affordability for the market relative to US standards.





SEGMENT DENSITY

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



For more information
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esri.com



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THE
SCIENCE
OF
WHERE®



LifeMode Group: Hometown

Small Town Sincerity

12C

Households: 2,305,700

Average Household Size: 2.26

Median Age: 40.8

Median Household Income: \$31,500

WHO ARE WE?

Small Town Sincerity includes young families and senior householders that are bound by community ties. The lifestyle is down-to-earth and semirural, with television for entertainment and news, and emphasis on convenience for both young parents and senior citizens. Residents embark on pursuits including online computer games, renting movies, indoor gardening, and rural activities like hunting and fishing. Residents keep their finances simple—paying bills in person and avoiding debt.

OUR NEIGHBORHOOD

- Reside in small towns or semirural neighborhoods, mostly outside metropolitan areas.
- Homes are a mix of older single-family houses (61%), apartments, and mobile homes.
- Half of all homes are owner occupied (Index 79).
- Median home value of \$92,300 is about half the US median.
- Average rent is \$639 (Index 62).
- This is an older market, with half of the householders aged 55 years or older and predominantly single-person households (Index 139).

SOCIOECONOMIC TRAITS

- Education: 67% with high school diploma or some college.
- Labor force participation lower at 52% (Index 83), which could result from lack of jobs or retirement.
- Income from wages and salaries (Index 83), Social Security (Index 133) or retirement (Index 106), increased by Supplemental Security Income (Index 183).
- Price-conscious consumers that shop accordingly, with coupons at discount centers.
- Connected, but not to the latest or greatest gadgets; keep their landlines.
- Community-oriented residents; more conservative than middle of the road.
- Rely on television or newspapers to stay informed.



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



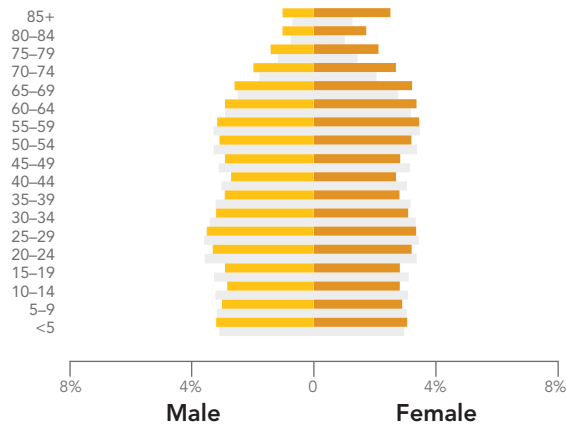
Small Town Sincerity



AGE BY SEX (Esri data)

Median Age: **40.8** US: 38.2

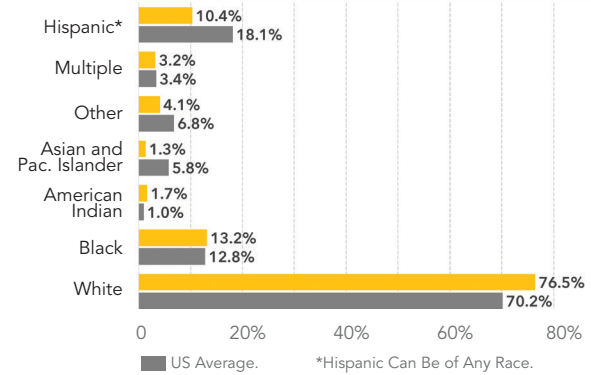
■ Indicates US



RACE AND ETHNICITY (Esri data)

The Diversity Index summarizes racial and ethnic diversity. The index shows the likelihood that two persons, chosen at random from the same area, belong to different race or ethnic groups. The index ranges from 0 (no diversity) to 100 (complete diversity).

Diversity Index: **51.0** US: 64.0



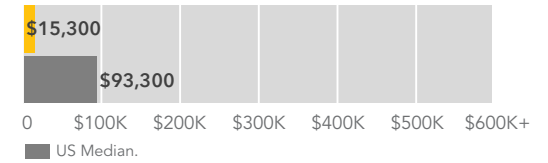
INCOME AND NET WORTH

Net worth measures total household assets (homes, vehicles, investments, etc.) less any debts, secured (e.g., mortgages) or unsecured (credit cards). Household income and net worth are estimated by Esri.

Median Household Income

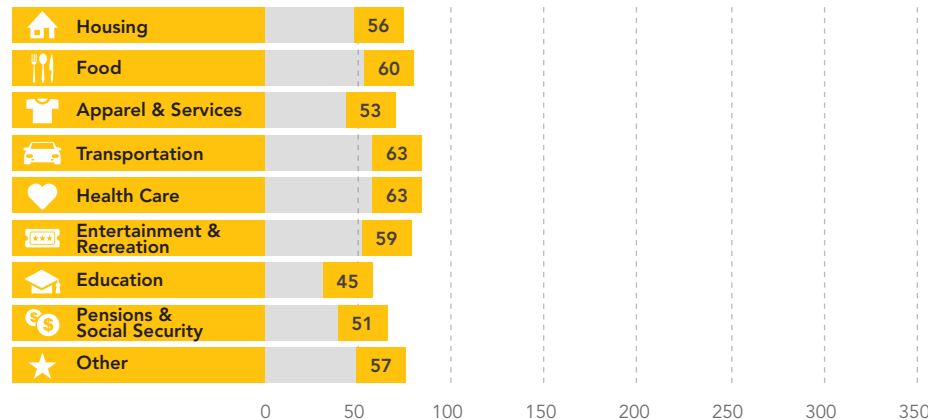


Median Net Worth



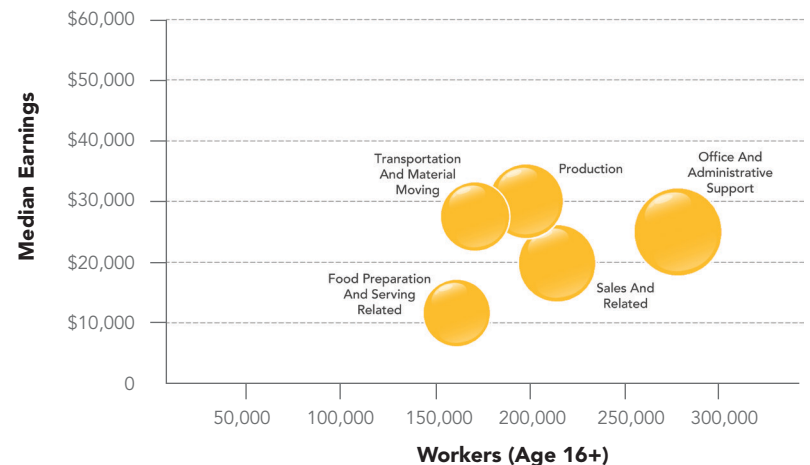
AVERAGE HOUSEHOLD BUDGET INDEX

The index compares the average amount spent in this market's household budgets for housing, food, apparel, etc., to the average amount spent by all US households. An index of 100 is average. An index of 120 shows that average spending by consumers in this market is 20 percent above the national average. Consumer expenditures are estimated by Esri.



OCCUPATION BY EARNINGS

The five occupations with the highest number of workers in the market are displayed by median earnings. Data from the Census Bureau's American Community Survey.





MARKET PROFILE (Consumer preferences are estimated from data by MRI-Simmons.)

- Small Town Sincerity features a semirural lifestyle, complete with domestic trucks and SUVs, ATVs, and vegetable gardens.
- Residents enjoy outdoor activities like hunting and fishing as well as watching NASCAR and college football and basketball on TV.
- A large senior population visit doctors and health practitioners regularly.
- A largely single population favors convenience over cooking—frozen meals and fast food.
- Home improvement is not a priority, but vehicle maintenance is.

HOUSING

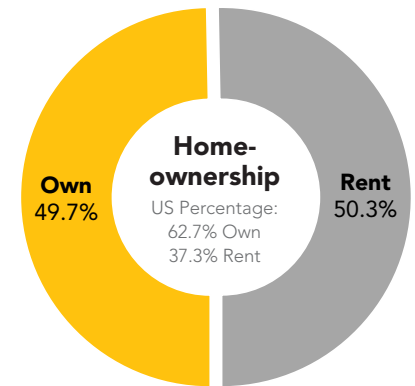
Median home value is displayed for markets that are primarily owner occupied; average rent is shown for renter-occupied markets. Tenure and home value are estimated by Esri. Housing type and average rent are from the Census Bureau's American Community Survey.



Typical Housing:
Single Family

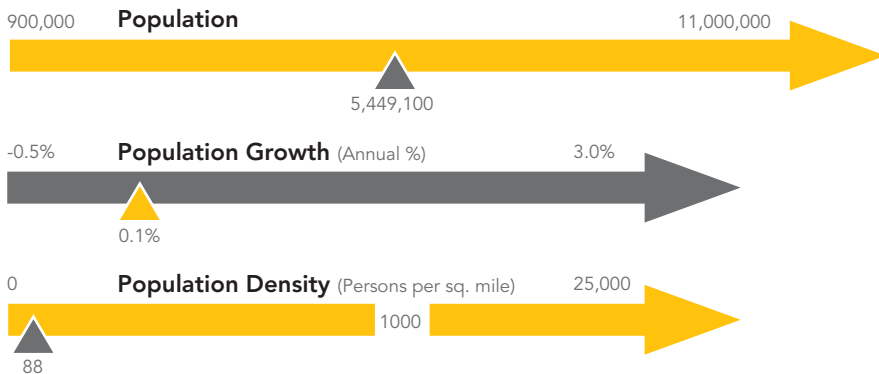
Median Value:
\$92,300

US Median: \$207,300



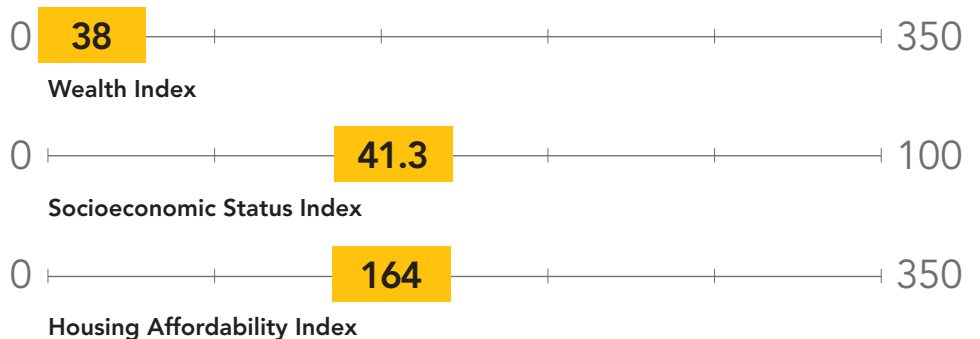
POPULATION CHARACTERISTICS

Total population, average annual population change since Census 2010, and average density (population per square mile) are displayed for the market relative to the size and change among all Tapestry markets. Data estimated by Esri.



ESRI INDEXES

Esri developed three indexes to display average household wealth, socioeconomic status, and housing affordability for the market relative to US standards.





LifeMode Group: Hometown

Small Town Sincerity

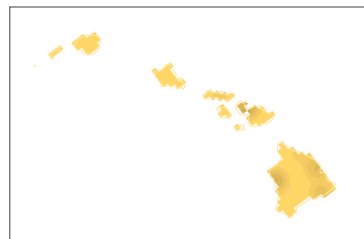
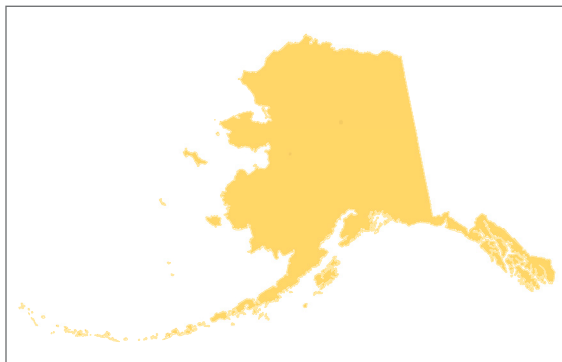
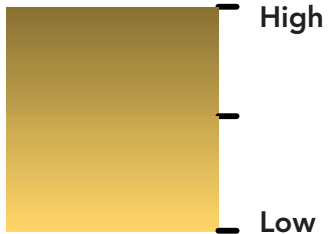
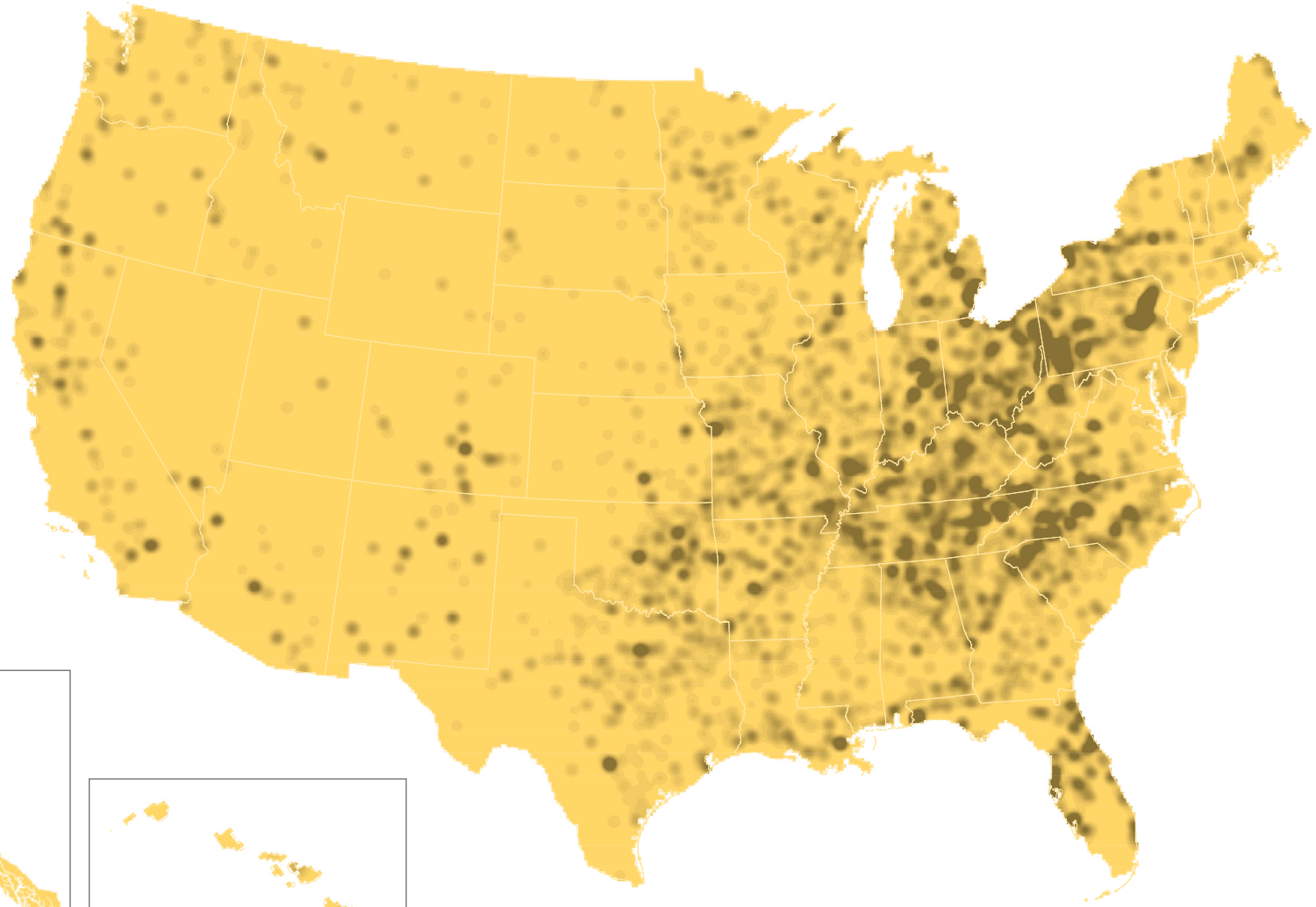


TAPESTRY
SEGMENTATION

esri.com/tapestry

SEGMENT DENSITY

This map illustrates the density and distribution of the *Small Town Sincerity* Tapestry Segment by households.



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1-800-447-9778
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