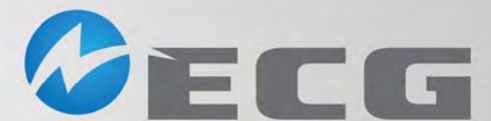




**SUPPORTING GREATNESS.
DEVELOPING OPPORTUNITIES.**

ECG Roundtable

Forsyth, GA March 26th, 2019





Introductions



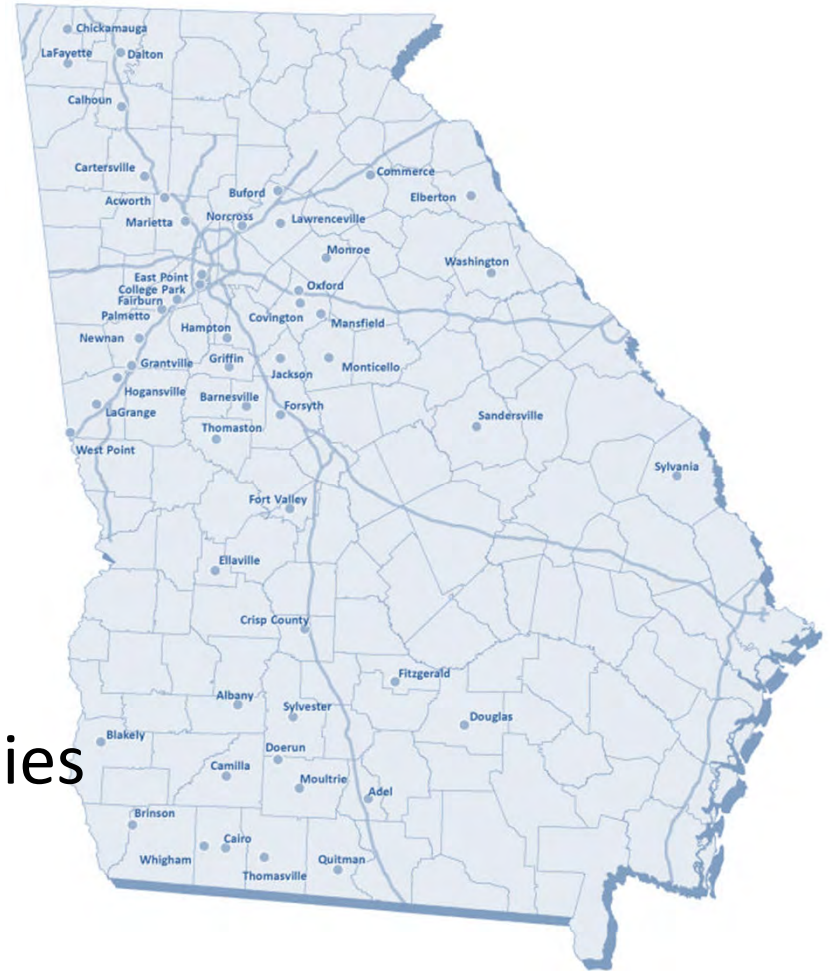
Discussion Agenda

- Retail Evolution to Main Street Comeback
- Incremental & practical approaches for community resiliency
- Rural Georgia chat: Happenings from downtown Sylvester to Hwy 82



What Are Folks Saying?

- Community Survey
 - E-commerce
 - Business recruitment
 - Marketing
 - Incentives
 - Downtown
 - Challenges & opportunities



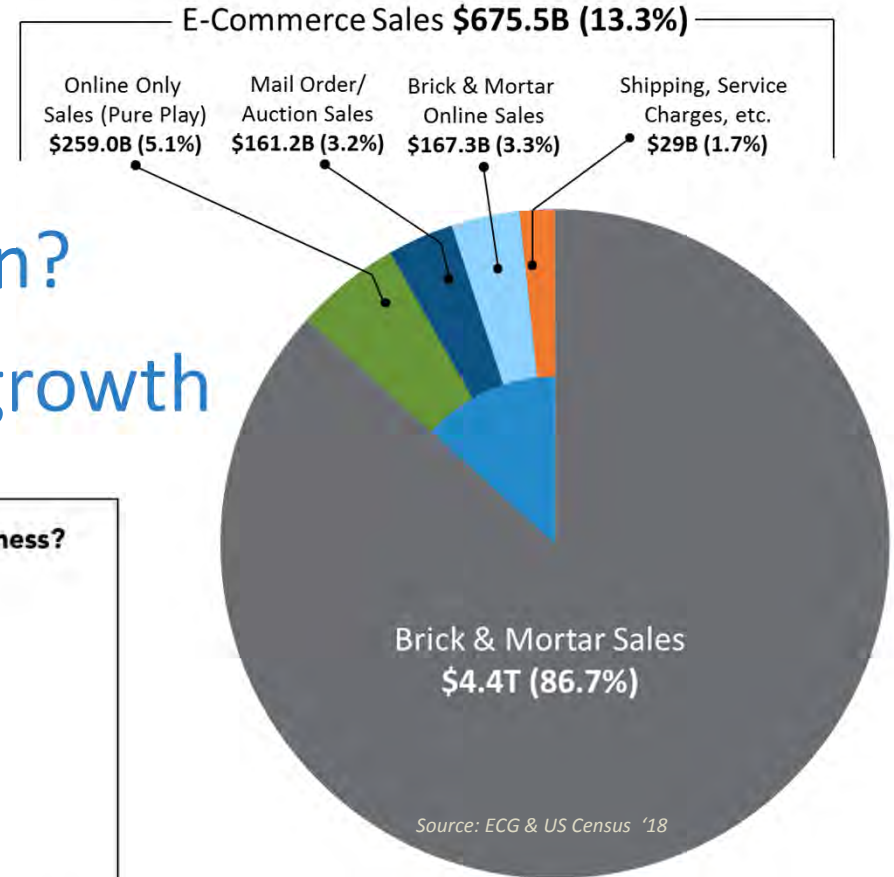
What You Said

- E-commerce
 - Small business expansion
 - ‘mom & pop’
 - Challenge to quantify
 - Leakage trends shifting
 - Big box suffering
 - Industrial opportunity
 - Distribution facilities
 - Freeport exemption



E-Commerce

- Walmart to Amazon
- Apocalypse or *evolution*?
- Omni-channel driving growth



Omni-Channeling

- Physical stores enduring, rollouts changing
- Online sales and brick & mortar not mutually exclusive- digital and physical integration



- 37% average increase in web traffic
- 80% of new openings
- Inverse holds true
- Consumer demographics matter

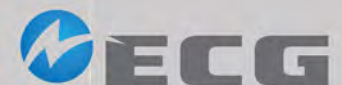


What You Said

- Retail Needs & Demands
 - Perception & reality
 - Distinction of national & local
 - Macro-economic forces
 - Location metrics
 - Restaurants, Grocery, Hotel
 - Entertainment, destination, local
- Business Recruitment & Marketing
 - Incentives
 - Broker, landowner, developer, end user
 - Insight: team sport



Source: Terramore Development



Craft Your Process & Narrative

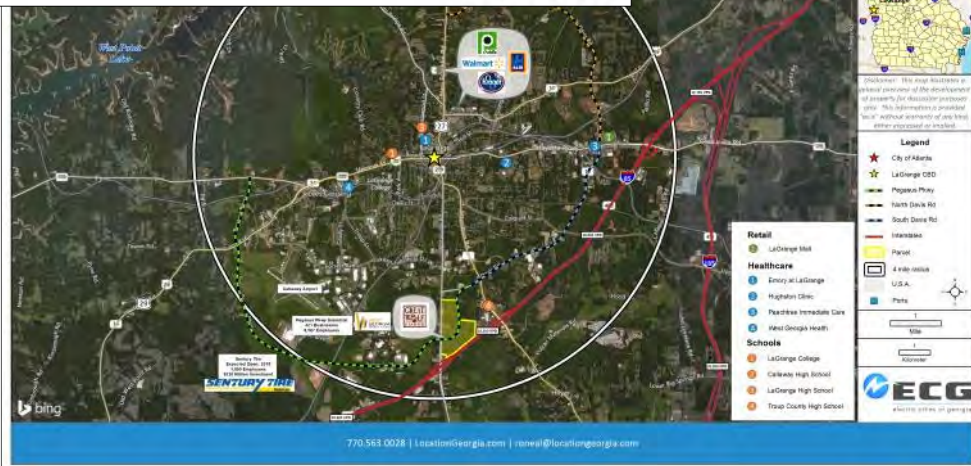
North Creek Shopping Center



Please follow QR Code for additional information on these and more retail opportunities.



<https://arcg.is/4GyqC>



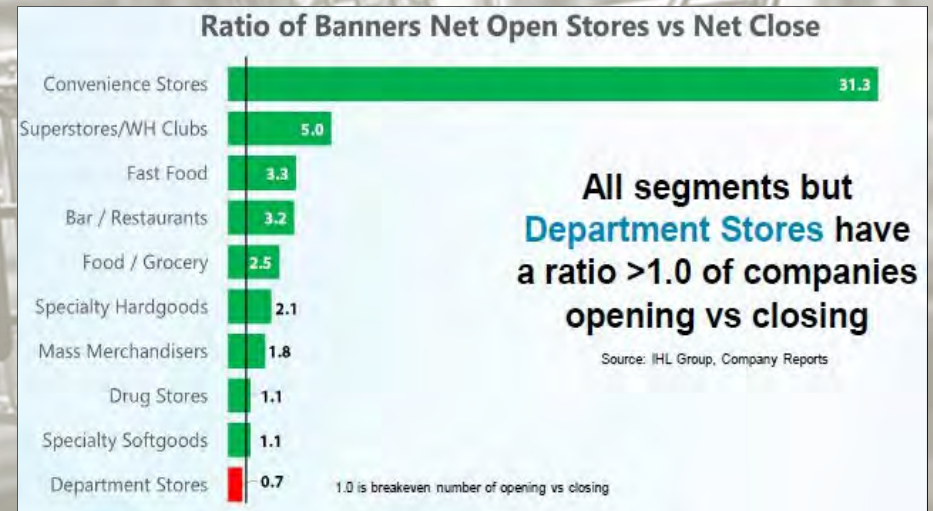
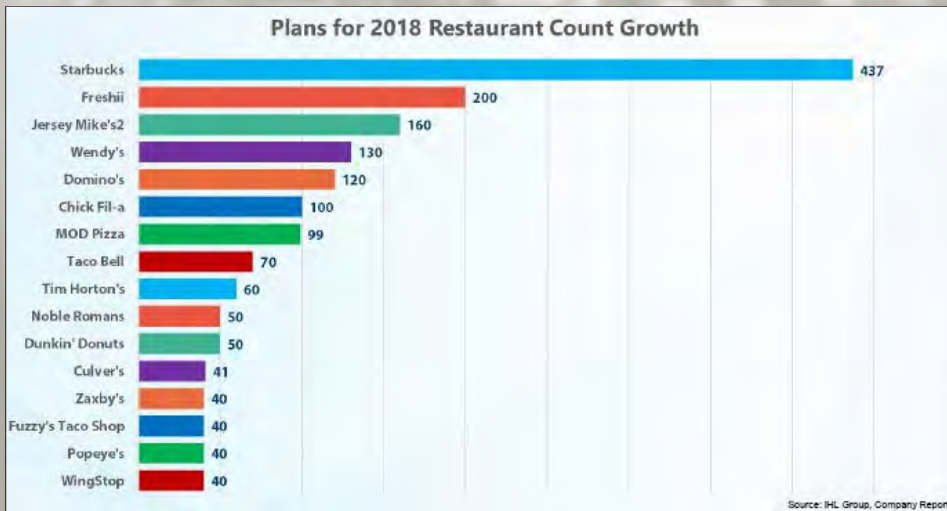
NAICS	Demand (Retail Potential)	Supply (Retail Sales)	Retail Gap
44-45,722	\$339,608,301	\$255,965,437	\$83,642,864
44-45	\$307,908,448	\$222,630,873	\$85,277,575
722	\$31,699,853	\$33,334,564	-\$1,634,711

- [Web based marketing](#)



Who's hot, who's not?

- US retail footprint vs. the world
- Store sector growth
 - Food, Drug, Convenience, MM (FDCM)
- Trends favor restaurants



Franchise Retail Opportunities

- A semi-local and regional approach to retail
- Target list of opportunities
 - Less than \$100K
 - Veterans



The UPS Store



Trends Moving Forward...

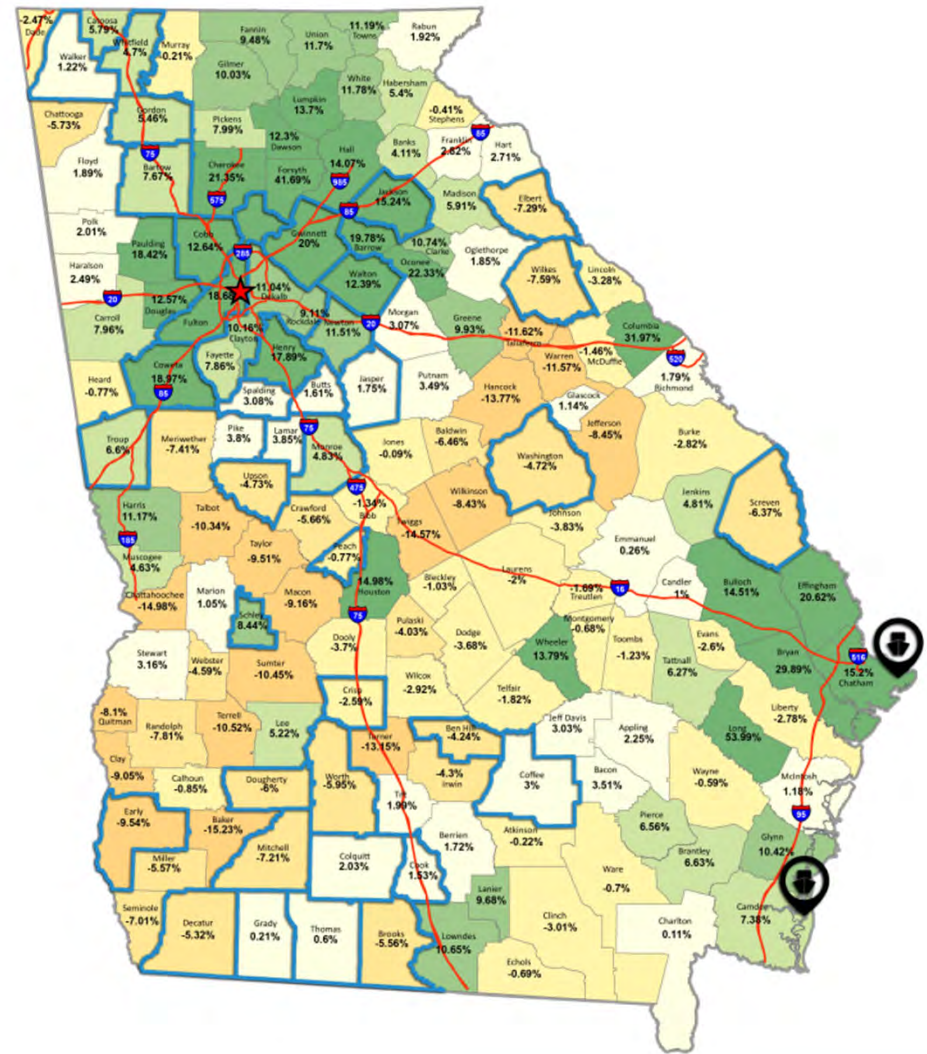
- Improving customer experience a must
 - 5 concepts in favor of brick & mortar
- Entrepreneurial and franchise growth
- Authentic, community, and local concepts
 - A brand consumers believe in
 - Personal connection
- *Where can these trends align and prosper in your community?*

What You Said



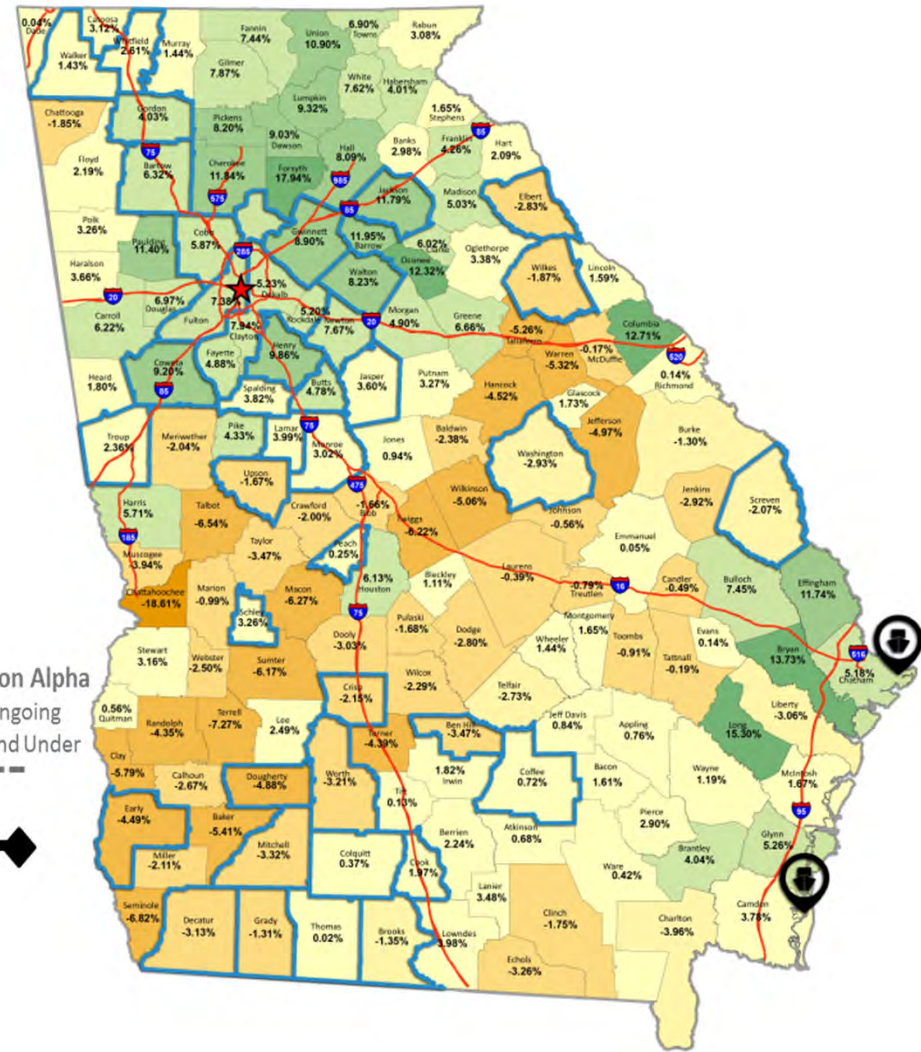
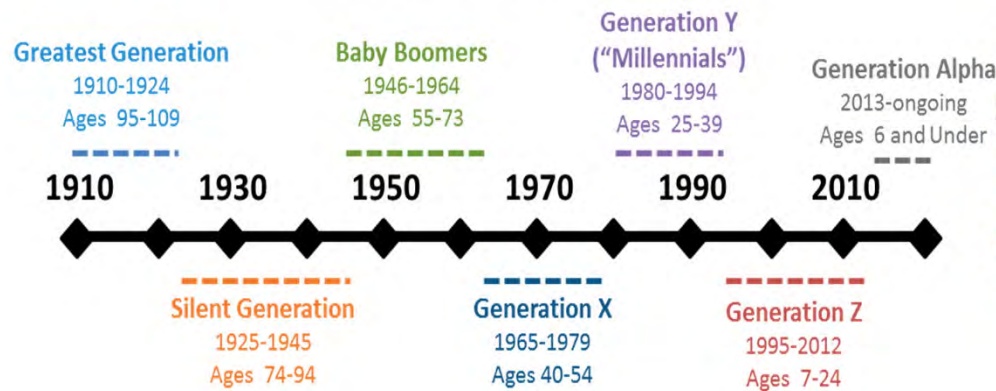
Headwinds & Opportunities

- 2008-2018



Headwinds & Opportunities

- 2018-2028
- Age groups
 - 70-74 up 25%
 - 75-79 up 23%
 - 20-24 down 3%



Downtown & Neighborhood Strategy

- Existing potential to support people & placemaking
 - Affordable housing options and alternative
 - Walkable neighborhoods
 - Authenticity, local economy, historic bones
 - Community fingerprint
 - Social cohesion in existing programs
- Aligning your built environment & assets with generational preferences & opportunities
 - More dynamic than retail following rooftops
 - Leverage existing demographics, but plan for what's coming
 - Deliberate and intentional community and place – 75% seek human connection, 80% instant gratification

Copyright ECG

Recreating the downtown....



Source: Exploregeorgia.org

Source:patch.com



The Economic Argument

- Vacant commercial building - \$420K
- Small Miscellaneous Store Retailer (ECG City)
 - 2 FTE employees
 - \$24,000 in labor income
 - \$35,000 in value added
 - \$75,000 in economic output
 - \$3,100 in city taxes
 - \$2,400 in county taxes



Source: Implan & ECG

The Economic Argument

Small Restaurant

- 5 FTE employees
- \$98,000 in labor income
- \$120,000 in value added
- \$263,000 in economic output
- \$6,000 in city taxes
- \$4,600 in county taxes



Source: Implan & ECG

Grassroots placemaking

- Tactical urbanism
- Artists & makerspaces



Visioning & Support Resources

- Rural zone application resources
- Downtown, corridor, and housing market studies
 - GIS support, research, analysis, recommendations
- [West Point, GA](#)



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