

WHO WE ARE

THE RETAIL COACH IS A NATIONAL RETAIL RECRUITMENT AND DEVELOPMENT FIRM THAT COMBINES STRATEGY, TECHNOLOGY AND RETAIL EXPERTISE TO DEVELOP AND EXECUTE HIGH-IMPACT RETAIL RECRUITMENT AND DEVELOPMENT PLANS.



NATIONAL CLIENT STATES

- 20 YEARS
- 600+ CLIENTS
- 37 STATES SERVED

MEET OUR TEAM



KELLY COFER, CCIM
Founder & CEO



AARON FARMER
President



NANCY DEES
Director of Finance



AUSTIN FARMER
Project Director



CHARLES PARKER
Project Director



MATTHEW LAUTENSACK
Director of Research
& Development



KYLE COFER
Project Manager



CAROLINE
HEARNSBERGER
Retail Recruitment
Specialist



CARY EVERITT
Retail Recruitment
Specialist



KATIE ZUNIGA
Marketing &
Communications
Manager



COVID-19 IMPACT

COVID-19 IMPACT

- RETAIL SALES ARE DOWN IN ALL MUNICIPALITIES - THE NATIONAL RETAIL FEDERATION IS EXPECTING A 20% (OR MORE) DROP IN RETAIL SALES OVER A PERIOD OF THREE MONTHS - SIMILAR TO WHAT CHINA HAS EXPERIENCED
- CONSUMER TRAFFIC TO BRICK AND MORTAR RETAILERS IS DOWN OR NON-EXISTENT
- SMALL BUSINESSES ARE TAKING THE HARDEST HIT
- SEVERAL RETAIL SECTORS ARE PERFORMING BETTER NOW THAN THEY WERE PRE COVID-19
- MANY RETAILERS/RESTAURANTS HAVE FURLOUGHED OR LAID OFF STAFF WHILE OTHERS ARE HIRING



COVID-19 IMPACT

THE RETAIL SECTORS TAKING THE HARDEST HIT INCLUDE:

- DEPARTMENT STORES
- CASUAL/SIT DOWN RESTAURANTS (OLIVE GARDEN, CHILI'S, ETC.)
- QUICK CASUAL RESTAURANTS (PANERA BREAD, CHIPOTLE, ETC.)
- APPAREL RETAILERS
- FURNITURE/HOME FURNISHING STORES



HAVERTYS®

COVID-19 IMPACT

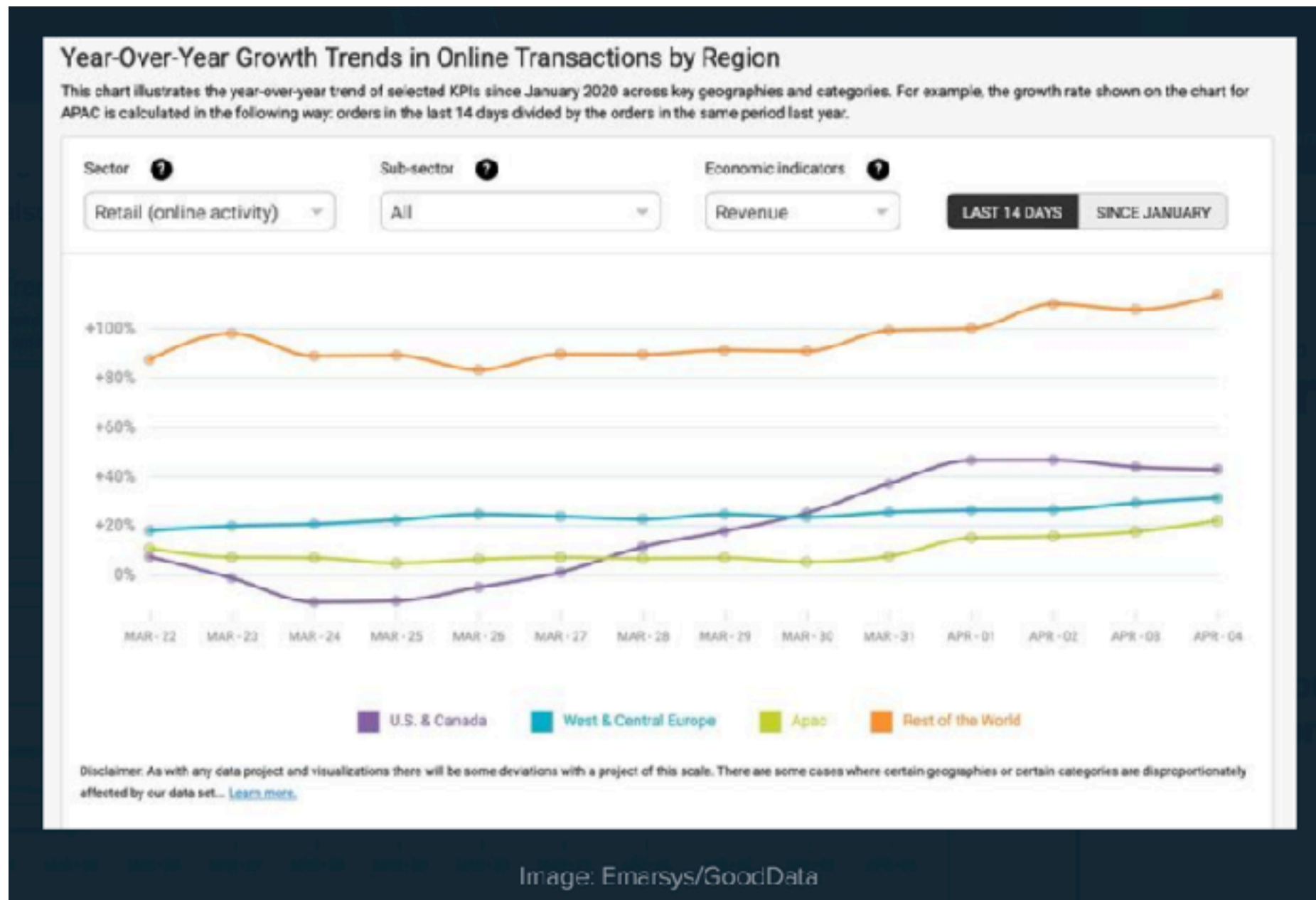
THE RETAIL SECTORS CURRENTLY EXPERIENCING GROWTH:

- GROCERY STORES (HEB, KROGER, ETC.)
- HOME IMPROVEMENT/HARDWARE STORES (HOME DEPOT, LOWES, ETC.)
- DOLLAR STORES (DOLLAR GENERAL, FAMILY DOLLAR, ETC.)
- FARM AND RANCH STORES (TRACTOR SUPPLY CO., LOCAL FEED STORES, ETC.)
- GAMING (GAMESTOP)



COVID-19 IMPACT

- MANY RETAILERS ARE USING E-COMMERCE SALES TO OFFSET LOSSES AT BRICK AND MORTAR LOCATIONS



COVID-19 IMPACT

IF A RETAIL BRAND WAS STRONG COMING INTO THE COVID-19 ERA, THEY WILL LIKELY CONTINUE TO BE STRONG AS WE MOVE AWAY FROM COVID-19.

FOR WEAKER BRANDS SUCH AS PIER 1, BED BATH & BEYOND, JCPENNY, NEIMAN MARCUS, ETC., COVID-19 COULD BE THEIR LAST STAND.

Pier1 imports®

JCPenny

BED BATH &
BEYOND®

COVID-19 IMPACT

CASH IS KING!

THOSE RETAILERS WITH LARGE CASH RESERVES WILL COME OUT OF THE COVID-19 ERA WITH CONTINUED GROWTH.

LULULEMON ENDED 2019 WITH \$1.1 BILLION IN CASH AND NO LONG TERM DEBT - BECAUSE OF THIS, LULULEMON PLANS TO CONTINUE THEIR AGGRESSIVE EXPANSION POST COVID-19.



COVID-19 IMPACT

Who's hiring?

Some companies need to hire more people to keep up with demand, despite millions of people losing their jobs elsewhere



Source: MarketWatch reporting

COVID-19 IMPACT

FURLOUGHED/LAID OFF:

THESE BRANDS HAVE FURLOUGHED OR LAID OFF MOST OF THEIR STAFF:

- MACY'S
- GAP
- OLD NAVY
- BANANA REPUBLIC
- VICTORIA'S SECRET
- BATH AND BODY WORKS
- ANN TAYLOR
- LANE BRYANT
- KOHL'S



LANE BRYANT

ANNTAYLOR

BANANA
REPUBLIC

VICTORIA'S
SECRET

OLD NAVY

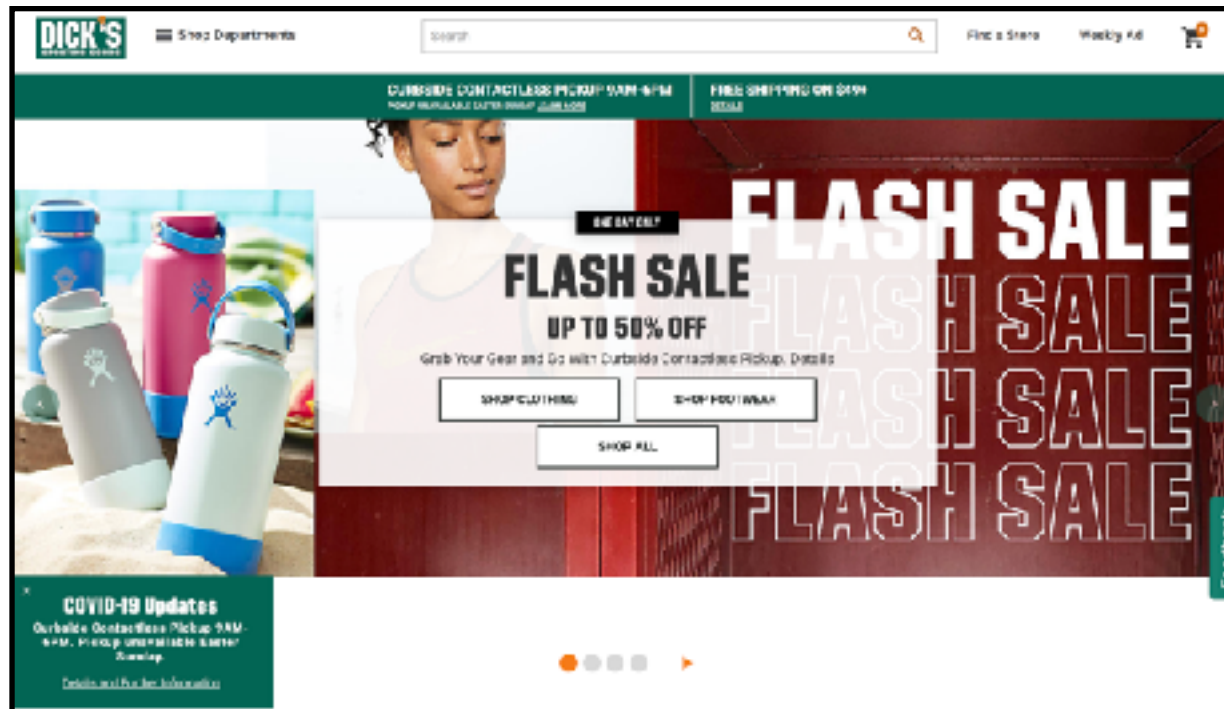
KOHL'S

GAP

COVID-19 IMPACT

BIG DISCOUNTS

MANY SMALL, REGIONAL, AND NATIONAL BRANDS ARE OFFERING BIG DISCOUNTS



COVID-19 IMPACT

PUBLIX SUPER MARKETS IS OFFERING TWO MONTHS OF RENT RELIEF TO BUSINESSES THAT OPERATE WITHIN PUBLIX-OWNED SHOPPING CENTERS THAT HAVE CLOSED DUE TO THE CORONAVIRUS OUTBREAK.





RETAIL RECRUITMENT: NOW & IN THE FUTURE

RETAIL RECRUITMENT: NOW AND IN THE FUTURE

OPTIMISM IN THE RETAIL INDUSTRY:

MOST NATIONAL AND REGIONAL RETAIL BRANDS REMAIN OPTIMISTIC.

TIM PULTE, SENIOR VICE PRESIDENT AT COLLIERS INTERNATIONAL, SAYS THAT WITH THE PROPER GOVERNMENT INTERVENTION NOW, THE PASSING OF THE VIRUS WILL SEE THINGS GET BACK ON TRACK. COLLIERS BELIEVES THAT ONCE THE VIRUS HAS CLEARED AND PEOPLE ARE ABLE TO GO BACK TO WORK, **THE REAL ESTATE MARKET WILL PICK UP SPEED AGAIN AND WILL NOT EXPERIENCE ANY LONG-TERM FALLOUT.**

RETAIL RECRUITMENT: NOW AND IN THE FUTURE

RETAIL SITE SELECTORS AND BROKERS ARE ALSO STUCK IN THEIR HOMES -
AND THEY ARE STILL WORKING:

WE WERE ON A CONFERENCE CALL RECENTLY WITH A NATIONAL RETAIL CHAIN AND WERE TOLD THAT THEY ARE GEARING UP DURING THIS LOCKDOWN AND THAT THEY SEE THE COMING WEEKS AS AN OPPORTUNITY TO IDENTIFY NEW LOCATIONS IN COMMUNITIES FOR EXPANSION.

THEY ALSO SAID NOT TO EXPECT A SLOW DOWN FROM THEM WHATSOEVER AND THAT THEY STILL HAVE AGGRESSIVE EXPANSION PLANS FOR 2020.

RETAIL RECRUITMENT: NOW AND IN THE FUTURE

SCHEDULE WEBINARS AND CONFERENCE CALLS WITH PROSPECTS:

UTILIZE ZOOM, GOTOMEETING, AND OTHER PROGRAMS TO STAY IN TOUCH WITH PROSPECTS.



GoToMeeting

zoom



Google Hangouts

RETAIL RECRUITMENT: NOW AND IN THE FUTURE

FOCUS ON SITES:

SITE SELECTORS HAVE NOTHING BUT TIME RIGHT NOW. GET SITES IN FRONT OF PROSPECTS NOW, SO THAT THEY ARE PREPARED TO MOVE QUICKLY, POST COVID-19 PANDEMIC.



Retail Pads & Shop Spaces Available
Ceres Gateway Center Highway 99 & Mitchell Road | Ceres, CA

New mixed-use development including retail, hotels, restaurants and office space being developed on Highway 99 and Mitchell Road in Ceres, California.

Property Features

- Proposed Super Walmart across street - 60/6 permits issued Feb. 2019
- Mitchell Road interchange access with new Interchange planned at Service Road.
- 1,100 linear feet of Highway 99 frontage
- 85' freeway pylon sign planned
- New signalized entry into project on Mitchell Road
- High traffic counts on Hwy 99 with great positioning between south Modesto and Turlock

Demographics

	Trade Area	3 mile	5 mile	10 mile
Est. Population	250,049	57,541	129,612	416,068
Avg. HH Income	\$76,143	\$73,900	\$71,472	\$79,579

Subject Site
CERES GATEWAY CENTER

100,000 VPD
84,000 VPD

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RETAIL RECRUITMENT: NOW AND IN THE FUTURE

PLAN FOR AN INFLUX OF AVAILABLE JUNIOR/BIG BOX SPACE IN THE MARKET
POST COVID-19



RETAIL RECRUITMENT: NOW AND IN THE FUTURE

THE RETURN OF GROCERY?



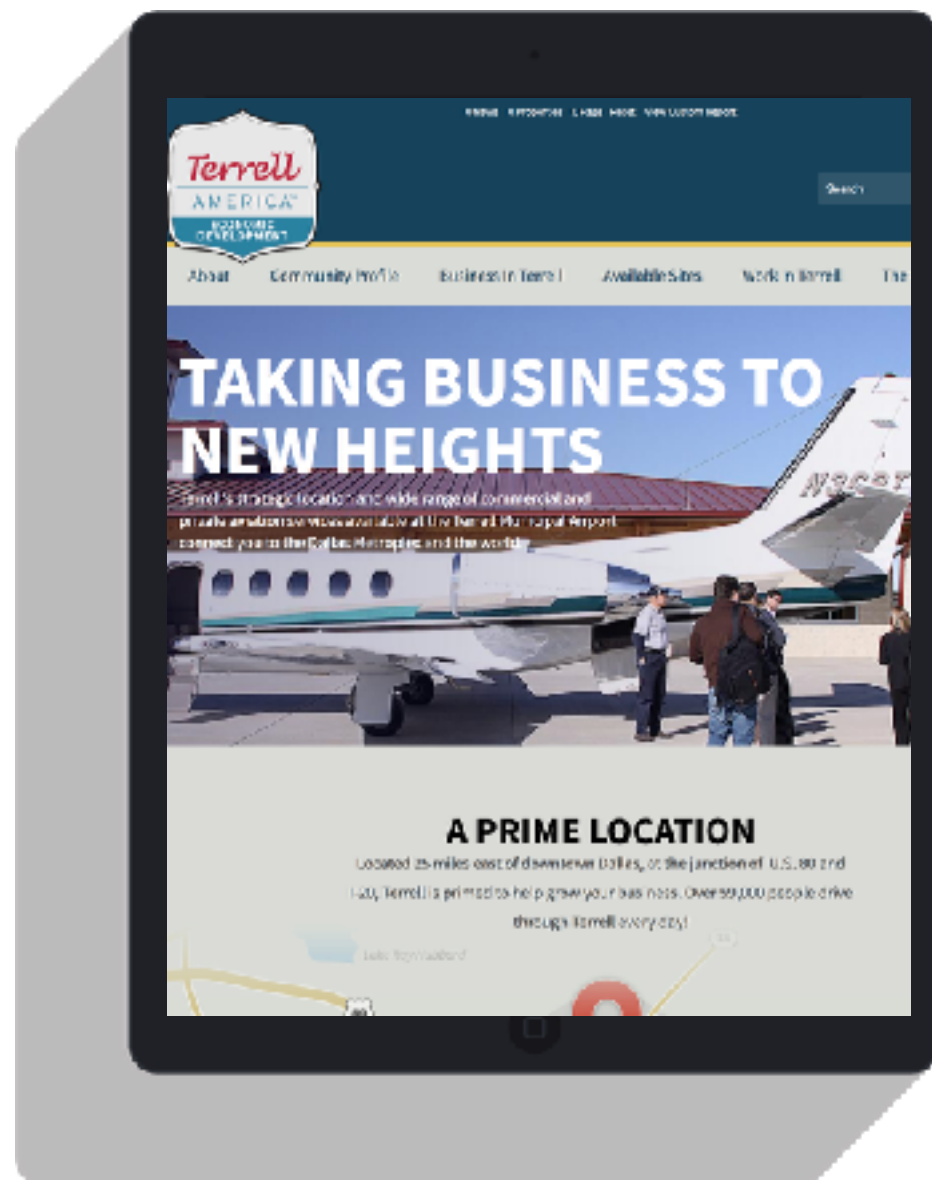
PRIOR TO COVID-19, HEB
WAS EXPANDING INTO NEW AREAS,
SUCH AS LUBBOCK AND
NORTH TEXAS. WITH INCREASING SALES
DURING COVID-19, WE EXPECT THIS
GROWTH TO CONTINUE AND POSSIBLY AT
A FASTER RATE



KROGER'S SALES WERE
UP 30% IN MARCH

RETAIL RECRUITMENT: NOW AND IN THE FUTURE

TAKE TIME NOW TO FRESHEN UP/UPDATE YOUR ECONOMIC DEVELOPMENT WEBSITE AND OVERALL WEB PRESENCE:



Google
Instagram
facebook
LinkedIn

RETAIL RECRUITMENT: NOW AND IN THE FUTURE

NOW IS THE TIME TO RE-TOOL YOUR TOOLBOX:

- DEMOGRAPHICS
- PSYCHOGRAPHICS
- CELL PHONE DATA
- RETAIL GAP DATA
- SITE PROFILES



RETAIL RECRUITMENT: NOW AND IN THE FUTURE

MARKETING & BRANDING:

TAKE TIME NOW TO FRESHEN UP/UPDATE YOUR MARKETING/BRANDING MATERIALS

- RETAIL MARKET PROFILE
- RETAILER MARKETING PACKAGES
- DEVELOPMENT/REDEVELOPMENT SITE PROFILES
- DEVELOPER MARKETING PACKAGES
- GIS DATA & SITE PLATFORM
- RETAIL MARKETING MATERIALS FOR USE AT CONFERENCES

RETAIL RECRUITMENT: NOW AND IN THE FUTURE

RETAIL RECRUITMENT: STAY ENGAGED WITH ICSC

INTERNATIONAL COUNCIL OF SHOPPING CENTERS (ICSC)

- ICSC RECON HAS BEEN POSTPONED - BUT THERE ARE PLANS TO RESCHEDULE IN THE FALL
- CURRENT INFORMATION AND RESOURCES FOR THE RETAIL INDUSTRY CAN BE FOUND AT [ICSC.ORG](https://www.icsc.org)
- ICSC IS OFFERING A FREE 3 MONTH MEMBERSHIP TO ANYONE LAID OFF IN THE INDUSTRY
- ICSC IS OFFERING EVERY MEMBER A DISCOUNT TO CONFERENCES IN 2020



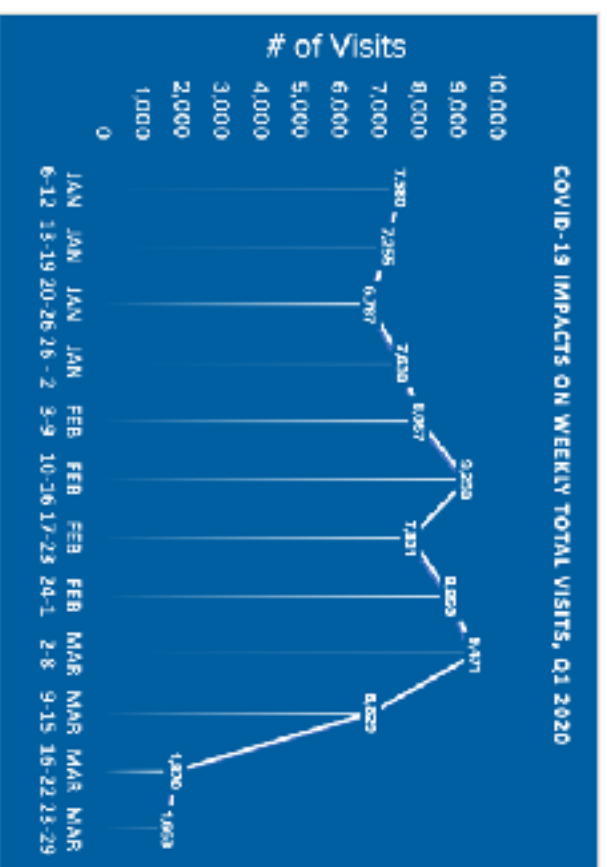
RETAIL RECRUITMENT: NOW AND IN THE FUTURE

TRACKING THE IMPACT:

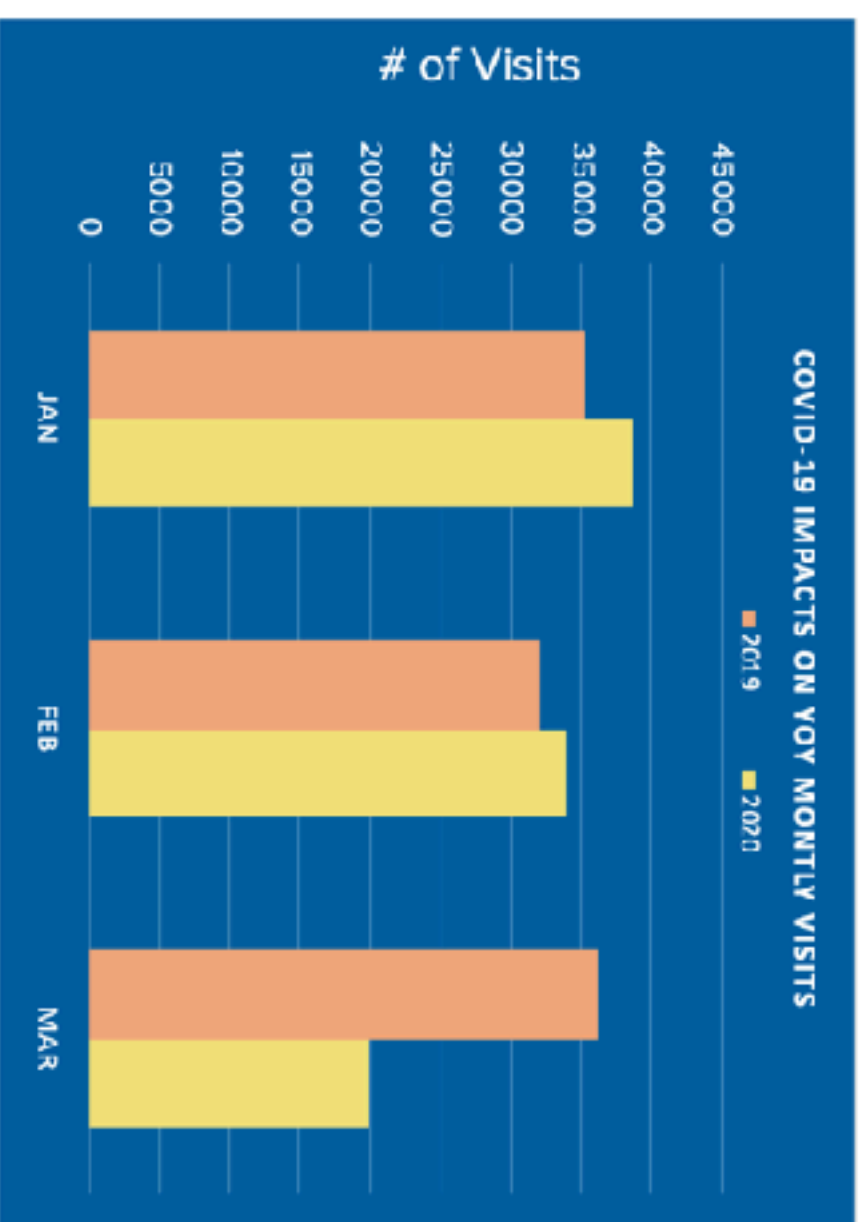
Impacts on Mobile Data Traffic: Apparel Stores

From January 6 to February 23, there were an average of 7,770 weekly visits to apparel stores in Camden, South Carolina. The following table and graph illustrate how visits to these locations were impacted over the following weeks as precautionary actions against the spread of the novel coronavirus were discussed and implemented across the United States.

Week	Total Weekly Visits	% Change from 2020 Average
February 23 - 29:	8,850	14%
March 1 - 7:	9,471	22%
March 8 - 14:	6,028	-12%
March 15 - 21:	1,870	-76%
March 22 - 28:	1,653	-79%



Month	Year		% Change
	2019	2020	
January	35,234	38,581	9%
February	32,154	33,988	6%
March	36,137	19,833	-45%



QUESTIONS?



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