

# Downtown Liberty, SC

## Market Report



Prepared By Appalachian Council of Governments

## Contents

The Downtown Revitalization Committee .....	1
Strengths .....	2
Weakness .....	2
Threats .....	2
Opportunities .....	2
Steps Forward .....	3
Liberty Retail Market Profile .....	4
Market Definition .....	4
City of Liberty Market Segmentation .....	5
Tapestry Segmentation .....	6
Retail Market Analysis .....	14
Retail Market Performance .....	14
Sales Surplus and Leakage Estimates .....	15
Primary Market Analysis .....	16
Secondary Market Analysis .....	17
Economic Development Strategies .....	19
Strategy One: Business Recruitment and Retention .....	19
Strategy Two: Managing Infill Development .....	20
Strategy Three: Cultivating the Destination .....	21
Strategy Four: Organization and Partnerships .....	22

## *The Downtown Revitalization Committee*

During initial efforts to determine the path forward to revitalize downtown Liberty, key stakeholders were engaged to discuss the future growth and development of Liberty, as well as opportunities to attract a growing market. The City of Liberty, citizens, and business owners began the process of exploring ways for promoting a revitalization effort in the downtown area of the community through a SWOT analysis that helped identify objectives and actions for moving forward. The process included input with business owners, residents, and local officials to help determine ways to improve downtown.

<p><b><u>Strengths</u></b> (to maximize)</p> <p><b>Atmosphere &amp; Small Town Charm</b> (8)</p> <p><b>Downtown Layout</b> (6)</p> <p><b>Advantageous Location</b> (6)</p> <p><b>Great Restaurants</b> (3)</p>	<p><b><u>Weaknesses</u></b> (to minimize)</p> <p><b>Appearance</b> (7)</p> <p><b>Empty Buildings</b> (7)</p> <p><b>Not “Business Friendly”</b> (zoning, standards, signage, lighting, unity) (5)</p> <p><b>Parking &amp; Infrastructure</b> (5)</p>
<p><b><u>Opportunities</u></b> (to take advantage of)</p> <p><b>Downtown Marketing &amp; Events</b> (8)</p> <p><b>Business Recruitment &amp; Diversification</b> (6)</p> <p><b>Beautification, Building Renovation and Planning</b> (4)</p> <p><b>Fill Empty Buildings</b> (4)</p> <p><b>Hospitality Tax Revenue</b> (1)</p>	<p><b><u>Threats</u></b> (to eliminate)</p> <p><b>Lack of United Vision and Direction</b> (7)</p> <p><b>Loss of Appeal and Interest in Downtown</b> (7)</p> <p><b>Reputation of Dying Businesses</b> (5)</p> <p><b>Deteriorating Infrastructure and Buildings</b> (4)</p>

The SWOT analysis revealed many common issues and concerns that residents have about Downtown Liberty as well as agreement on the strengths of the community.

## Strengths

The biggest strength was what the group considered the distinct downtown core and the sense of place that it provided for Liberty. The advantageous location between Clemson and Greenville in the region as well as proximity to residential areas and the County Commerce Park were all identified as strengths that should be used as leverage for building a better downtown. The presence of several quality restaurants is another strength that the community can build on as it looks to recreate itself as a destination for area residents.

## Weakness

The biggest weakness of downtown were issues associated with image. The group felt that the overall image of downtown lacked character and the appearance of the district suffered. Deteriorating infrastructure was a key issue with residents. The need for sidewalk repair and improved lighting was noted. The condition of Commerce Street was also identified as a problem the community needed to address. The street has had some deterioration due to erosion of the road bed below the pavement that the City has had to patch over time.

Empty storefronts and the lack of upkeep was also mentioned as a reason for the negative image of downtown. The lack of parking downtown was seen as a weakness as well. Business owners and residents also noted that the city has not been "business friendly" in several ways. One concern was the lack of effectiveness of local zoning regulations that dealt with signage, lighting, and other development standards.

## Threats

The group acknowledged the primary threat to improving downtown was the lack of a unified vision. The revitalization committee was formed in large part to address the need for a common vision. The lack of a unified focus for business recruitment has caused confusion and hindered recruitment into downtown. The lack of a cohesive plan for improvements also threatens to contribute to the decline of the district.

The lack of progress in improving downtown has occurred at the same time other communities have revitalized their downtowns. As other communities continue to revitalize their downtowns the threat of becoming the forgotten community is a major concern. Apathy from residents and businesses leaving has created a reputation for the Liberty Downtown as a dying place. These threats all contribute to an decline in the appeal of the district and overall interest.

## Opportunities

Although there are many factors that have prevented Downtown Liberty from flourishing there are many opportunities for improvement. Improvements needed downtown have an excellent chance of improving downtown Liberty because of the many buildings available for use by businesses. The infrastructure improvements such as streetscaping, lighting, sidewalk improvements and road repairs would immediately make the downtown more attractive to businesses and residents which are the basis for revitalizing downtown. Additional opportunities for revitalization include the potential for a

marketing plan for downtown to create an image and brand for Liberty's downtown. The creation of downtown festivals and events could take advantage of Liberty's central location in the County and close proximity to universities.

### Steps Forward

The group identified both short term and long term goals for revitalizing downtown. The short term goals identified were with the specific purpose of giving credibility to this downtown revitalization movement and to establish momentum. Possible events should be considered carefully to ensure they are a success and achieve the desired effect. Ensuring good crowds will be essential to getting buy in from downtown businesses that are supportive of any efforts that lead to higher customer traffic and visibility for their storefronts.

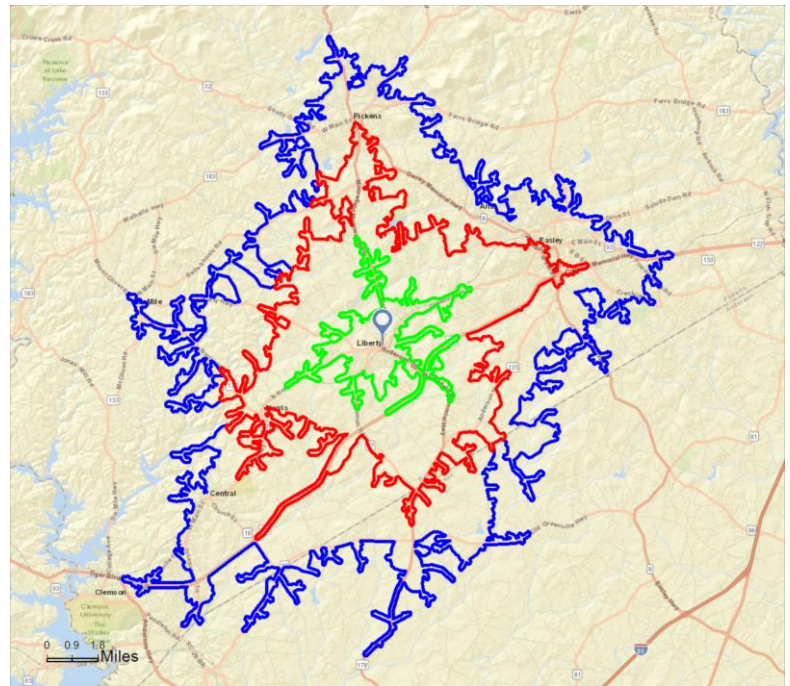
The long-term goals noted addressed the issues of creating a cohesive vision for downtown, outlining the necessary improvements to support the rebirth of Downtown Liberty. The initial long term goals include:

- Development of a downtown master plan to include business plan and marketing in addition to physical improvements.
- Identify physical design and planning projects that support economic and branding efforts and help develop the character of Liberty
- Develop a relationship with students/interns from Clemson University that can help with designing facade improvements, improving ordinances, and development standards.

## *Liberty Retail Market Profile*

The Town of Liberty lies in the Center of Pickens County with convenient access to Greenville, Clemson and the I-85 corridor through the Upstate of South Carolina. The map below shows three areas that are related to the 5, 10, and 20 minute drive time radius from downtown Liberty. These areas represent the populations that Liberty can consider within their market area and from which the majority of people that Liberty will target to live, work, shop, and eat in their downtown.

There are detailed reports attached with this document that provide demographic information on each of the three areas depicted on the map. From those reports it shows that within a 5 minute drive time



of Liberty's downtown there are 3,706 residents and 1,518 households. Looking further out at the 10 minute drive time radius there are just over 19,000 people and over 54,000 within a 15 minute drive. That is a significant market from which Liberty can draw patrons. There is also a lot of competition for these residents which is a challenge for the community. The opportunity it presents though is tremendous because you only need to attract a relatively low percentage of these people to make a significant improvement in patronage of downtown Liberty.

This shows a stable population base within a 10 minute drive of downtown that establishes a strong core for Liberty to market to. These residents could be the focus of efforts to attract more activity downtown as they are in close proximity and will be the people most likely to use downtown businesses on a regular basis.

This section presents the findings of the market analysis for the Town of Liberty. The market definition section of this report provides a description of the geography of Liberty's customer base, and the individual market studies present specific business recruitment and development opportunities. The data will prove to be useful to Liberty, its partners, as well as to individual businesses and property owners looking to make investments in the community.

### **Market Definition**

The market definition exercise establishes the geography of the retail trade area for Liberty and provides the baseline data for the subsequent analyses. In order for the conclusions to be accurate, it is important that the market analysis reflect the consumer habits within Liberty's trade areas rather than arbitrary study areas such as political boundaries and concentric circles. Therefore, the process began



with a population defined by relative drive times from downtown Liberty to determine the market base relevant to Liberty and its businesses. This includes determining its place within the larger region and nearby competitive markets.

In addition to defining the geographic market area, residents lifestyles also define market potential. People who share the same demographic characteristics often have widely divergent desires and preferences. Using Community Tapestry data (developed by ESRI Business information Solutions) we are able to define lifestyle segmentations that identify buying habits and preferences of consumers in geographic areas. Community Tapestry descriptions help bring to life demographic variables by sharing information on consumer spending habits, household types, hobbies and preferences of local market segments.

Tapestry Segmentation classifies US neighborhoods into 67 distinct market segments. Tapestry Segmentation combines the “who” of lifestyle demography with the “where” of local neighborhood geography to create a model of various lifestyle classifications, or segments, of actual neighborhoods with addresses—distinct behavioral market segments. Below is a table showing the Tapestry market segments identified for each of the three drive time areas which are used to identify Liberty’s market areas.

#### City of Liberty Market Segmentation

5 Minute Drive Time				
Top Tapestry Segments	Percent	Demographic Summary	2016	2021
Heartland Communities (6F)	93.2%	Population	3,761	3,770
Southern Satellites (10A)	6.9%	Households	1,518	1,512
Top Tier (1A)	0.0%	Families	1,033	1,024
Professional Pride (1B)	0.0%	Median Age	40.0	41.5
Boomburbs (1C)	0.0%	Median Household Income	\$40,753	\$40,376
10 Minute Drive Time				
Top Tapestry Segments	Percent	Demographic Summary	2016	2021
Southern Satellites (10A)	32.3%	Population	19,090	19,357
Heartland Communities (6F)	30.4%	Households	7,314	7,370
Traditional Living (12B)	13.6%	Families	5,175	5,195
Down the Road (10D)	12.2%	Median Age	38.6	39.8
Salt of the Earth (6B)	3.6%	Median Household Income	\$38,338	\$38,825
15 Minute Drive Time				
Top Tapestry Segments	Percent	Demographic Summary	2016	2021
Heartland Communities (6F)	22.3%	Population	54,558	55,929
Southern Satellites (10A)	17.6%	Households	21,668	22,062
Middleburg (4C)	8.0%	Families	13,666	13,815
Dorms to Diplomas (14C)	7.4%	Median Age	36.5	37.5
Traditional Living (12B)	4.9%	Median Household Income	\$38,082	\$39,187

### Tapestry Segmentation

The chart below represents a breakdown of all the segments in the overall market base broken into primary, secondary, and outlying trade areas based on drive times. This table below breaks down the counts and percentages of social group cluster identified in the Market Segmentation table. The Tapestry Segments are centered on two primary groups: Heartland Communities and Southern Satellites. There are 1,518 households in Liberty's primary trade area, the 5-minute drive time market, which is classified as 93.2% Heartland Communities. Heartland Communities and Southern Satellites make up the two largest segments of the secondary market defined by the 10 drive time radius. The secondary market has 7,314 households and Southern Satellites (32.3%) and Heartland Communities (30.4%) account for over 62% of the total market.

2016 Households	Primary Trade Area 5 Minute Drive Time			Secondary Trade Area 10 Minute Drive Time			Outlying Market 15 Minute Drive Time		
Tapestry Segment	Pop	Pct	Rank	Pop	Pct	Rank	Pop	Pct	Rank
Heartland Communities (6F)	3,505	0.93%	1	6,166	30.4%	2	12,166	22.3%	1
Southern Satellites (10A)	256	0.07%	2	5,803	32.3%	1	9,602	17.6%	2
Traditional Living (12B)				2,596	13.6%	3	2,673	4.9%	5
Down the Road (10D)				2,329	12.2%	4	-		
Salt of the Earth (6B)				687	3.6%	5	-		
Middleburg (4C)							4,365	8.0%	3
Dorms to Diplomas (14C)							4,037	7.4%	4
<b>Total Count/Pct of Area</b>	<b>3,761</b>	<b>100%</b>		<b>17,582</b>	<b>92.1%</b>		<b>32,844</b>	<b>60.2%</b>	

Additional segments of note include Traditional Living, Middleburg, and Dorms to Diplomas. Each Tapestry Segment is described below to provide a better understanding of the habits of persons in these categories.





LifeMode Group: Cozy Country Living

## Heartland Communities

6F

Households: 2,864,000

Average Household Size: 2.38

Median Age: 41.5

Median Household Income: \$39,000

### WHO ARE WE?

Well settled and close-knit, *Heartland Communities* are semirural and semiretired. These older householders are primarily homeowners, and many have paid off their mortgages. Their children have moved away, but they have no plans to leave their homes. Their hearts are with the country; they embrace the slower pace of life here but actively participate in outdoor activities and community events. Traditional and patriotic, these residents support their local businesses, always buy American, and favor domestic driving vacations over foreign plane trips.



### OUR NEIGHBORHOOD

- Rural communities or small towns are concentrated in the Midwest, from older Rustbelt cities to the Great Plains.
- Distribution of household types is comparable to the US, primarily (but not the majority) married couples, more with no children, and a slightly higher proportion of singles (Index 112) that reflects the aging of the population.
- Residents own modest, single-family homes built before 1970.
- They own one or two vehicles; commutes are short (Index 95).

### SOCIOECONOMIC TRAITS

- Retirees in this market depress the average labor force participation rate to less than 60% (Index 95), but the unemployment rate is comparable to the US.
- More workers are white collar than blue collar; more skilled than unskilled.
- The rural economy of this market provides employment in the manufacturing, construction, and agriculture industries.
- These are budget savvy consumers; they stick to brands they grew up with and know the price of goods they purchase. Buying American is important.
- Daily life is busy, but routine. Working on the weekends is not uncommon.
- Residents trust TV and newspapers more than any other media.
- Skeptical about their financial future, they stick to community banks and low-risk investments.

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.

## 6F LifeMode Group: Cozy Country Living Heartland Communities



### MARKET PROFILE

(Consumer preferences are estimated from data by GfK MRI)

- Traditional in their ways, residents of *Heartland Communities* choose to bank and pay their bills in person and purchase insurance from an agent.
- Most have high-speed Internet access at home or on their cell phone but aren't ready to go paperless.
- Many residents have paid off their home mortgages but still hold auto loans and student loans. Noninterest checking accounts are common.
- To support their local community, residents participate in public activities.
- Home remodeling is not a priority, but homeowners do tackle necessary maintenance work on their cherished homes. They have invested in riding lawn mowers to maintain their larger yards.
- They enjoy country music and watch CMT.
- Motorcycling, hunting, and fishing are popular; walking is the main form of exercise.
- To get around these semirural communities, residents prefer domestic trucks or SUVs.
- They prefer to travel in the US and favor the convenience of packaged deals.

### HOUSING

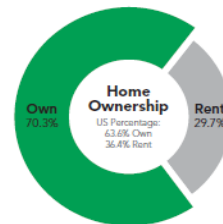
Median home value is displayed for markets that are primarily owner occupied; average rent is shown for renter-occupied markets. Tenure and home value are estimated by Esri. Housing type and average rent are from the Census Bureau's American Community Survey.



**Typical Housing:**  
Single Family

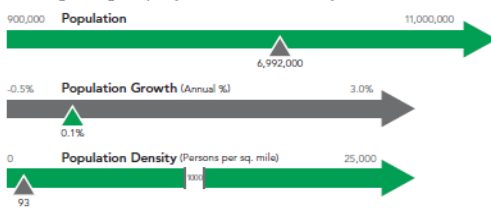
**Median Value:**  
\$89,000

US Median: \$177,000



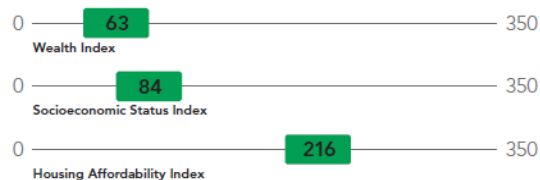
### POPULATION CHARACTERISTICS

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: Rustic Outposts

## Southern Satellites

10A

Households: 3,775,000

Average Household Size: 2.65

Median Age: 39.7

Median Household Income: \$44,000

### 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 nondiverse, slightly older, settled married-couple families, who own their homes. Almost two-thirds of the homes are single-family structures; 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 79% 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 (65%), with a number of mobile homes (Index 523).
- Most housing units were built in 1970 or later.
- Most households own 1 or 2 vehicles, but owning 3+ vehicles is common (Index 146).

### SOCIOECONOMIC TRAITS

- Education: almost 40% have a high school diploma only (Index 137); 41% have college education (Index 72).
- Unemployment rate is 9.2%, slightly higher than the US rate.
- Labor force participation rate is 59.7%, 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 GR. MR.

10A

LifeMode Group: Rustic Outposts

## Southern Satellites



### MARKET PROFILE

(Consumer preferences are estimated from data by GR. MR.)

- 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 Country Music Television (CMT).
- Read fishing/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

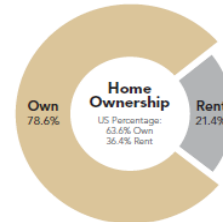
Median home value is displayed for markets that are primarily owner occupied; average rent is shown for renter-occupied markets. Tenure and home value are estimated by Esri. Housing type and average rent are from the Census Bureau's American Community Survey.



**Typical Housing:**  
Single Family;  
Mobile Homes

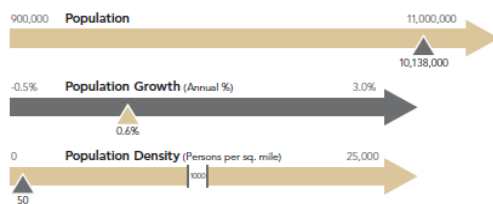
**Median Value:**  
\$119,000

US Median: \$177,000



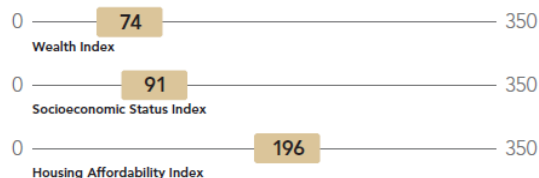
### POPULATION CHARACTERISTICS

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### ESRI INDEXES

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## LifeMode Group: Family Landscapes Middleburg

4C

Households: 3,319,000

Average Household Size: 2.73

Median Age: 35.3

Median Household Income: \$55,000

### 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 152).
- Affordable housing, median value of \$158,000 (Index 89) with a low vacancy rate.
- Young couples, many with children; average household size is 2.73.

### SOCIOECONOMIC TRAITS

- Education: 66% with a high school diploma or some college.
- Unemployment rate lower at 7.4% (Index 85).
- Labor force participation typical of a younger population at 66.7% (Index 106).
- 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 MR.

## 4C LifeMode Group: Family Landscapes Middleburg



### MARKET PROFILE

(Consumer preferences are estimated from data by GfK MR)

- Residents are partial to trucks, SUVs, and occasionally, convertibles, 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, target shooting, bowling, and baseball.
- TV and magazines provide entertainment and information.
- Media preferences include country and Christian channels.

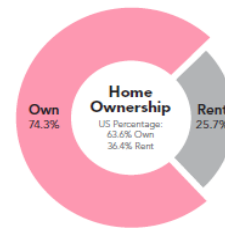
### HOUSING

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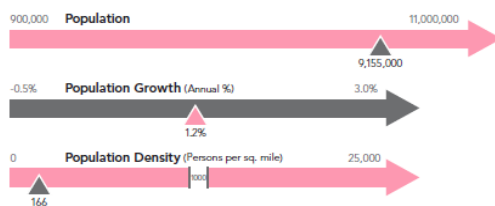
**Typical Housing:**  
Single Family

**Median Value:**  
\$158,000  
US Median: \$177,000



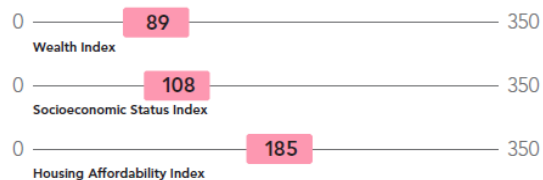
### POPULATION CHARACTERISTICS

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### ESRI INDEXES

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LifeMode Group: Scholars and Patriots

## Dorms to Diplomas

14C

Households: 589,000

Average Household Size: 2.20

Median Age: 21.5

Median Household Income: \$17,000

### WHO ARE WE?

On their own for the first time, *Dorms to Diplomas* residents are just learning about finance and cooking. Frozen dinners and fast food are common options. Shopping trips are sporadic, and preferences for products are still being established. Many carry a balance on their credit card so they can buy what they want now. Although school and part-time work take up many hours of the day, the remainder is usually filled with socializing and having fun with friends. They are looking to learn life lessons inside and outside of the classroom. This is the first online generation, having had lifelong use of computers, the Internet, cell phones, and MP3 players.

### OUR NEIGHBORHOOD

- Mix of dorms, on-campus and off-campus housing cater to young renters.
- Off-campus householders are commonly students living alone or with roommates; average household size is 2.2.
- 80% of the housing are apartments; many older homes in town have been converted into multifamily living units.
- With limited parking on campus, many walk, bike, or car pool to class.
- Only one in ten homes are owner occupied.

### SOCIOECONOMIC TRAITS

- They're the youngest market with half of the population aged 20–24.
- They're impulse buyers who experiment with different brands.
- They buy trendy clothes on a budget.
- Vehicles are just a means of transportation—economy and environmental impact are factors in purchases; used, imported subcompact cars are a popular choice.
- They value socializing, having fun, and learning new things.
- They're always connected; their cell phone is never out of reach.



Note: This marker represents the ratio of the segment rate to the US rate multiplied by 100. Consumer preferences are estimated from data by GRM MR.

14C

LifeMode Group: Scholars and Patriots

## Dorms to Diplomas



### MARKET PROFILE

(Consumer preferences are estimated from data by GRM MR)

- They enjoy going out to bars for drinks and maybe a game of billiards.
- With little experience cooking, fast food and frozen dinners are the "go-to" choices.
- Appearance and fashion preferences come from magazines; hair color and teeth whiteners are commonplace.
- They listen to all the latest music on mobile MP3 players.
- They're very active, participating in many sports, especially yoga.
- Use a computer for just about everything including news, entertainment, shopping, blogging, social media, TV, movies, and homework.

### HOUSING

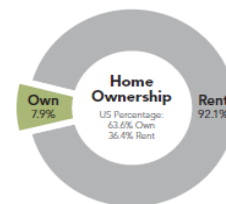
Median home value is displayed for markets that are primarily owner occupied; average rent is shown for renter-occupied markets. Tenure and home value are estimated by Esri. Housing type and average rent are from the Census Bureau's American Community Survey.



**Typical Housing:**  
Multiunit Rentals

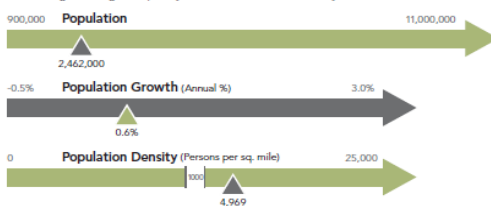
**Average Rent:**  
\$990

US Average: \$990



### POPULATION CHARACTERISTICS

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### 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 Traditional Living

12B

Households: 2,369,000

Average Household Size: 2.50

Median Age: 34.8

Median Household Income: \$37,000

### WHO ARE WE?

Residents in this segment live primarily in low-density, settled neighborhoods in the Midwest. The households are a mix of married-couple families and singles. Many families encompass two generations who have lived and worked in the community; their children are likely to follow suit. The manufacturing, retail trade, and health care sectors are the primary sources of employment for these residents. This is a younger market—beginning householders who are juggling the responsibilities of living on their own or a new marriage, while retaining their youthful interests in style and fun.



### OUR NEIGHBORHOOD

- Married couples are the dominant household type, but fewer than expected from the younger age profile and fewer with children (Index 79); however, there are higher proportions of single-parent (Index 146) and single-person households (Index 112).
- Average household size is slightly lower at 2.50.
- Homes are primarily single family or duplexes in older neighborhoods, built before 1940 (Index 183).
- Most neighborhoods are located in lower-density urban clusters of metro areas throughout the Midwest and South.
- Average commuting time to work is slightly shorter (Index 88).
- Households have one or two vehicles.

### SOCIOECONOMIC TRAITS

- Over 70% have completed high school or some college.
- Unemployment is higher at 10.9% (Index 127); labor force participation is also a bit higher at 64.6%.
- Over three quarters of households derive income from wages and salaries, augmented by Supplemental Security Income (Index 122) and public assistance (Index 149).
- Cost-conscious consumers that are comfortable with brand loyalty, unless the price is too high.
- Connected and comfortable with the Internet, they are more likely to participate in online gaming or to access dating websites.
- TV is seen as the most trusted 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 GRM MR.

## 12B LifeMode Group: Hometown Traditional Living



### MARKET PROFILE

(Consumer preferences are estimated from data by GRM MR)

- They shop for groceries at discount stores such as Walmart supercenters; Kmart is also a favorite for apparel and sundry household and personal care products.
- Convenience stores are commonly used for fuel or picking up incidentals like lottery tickets.
- They tend to carry credit card balances, have student loans, and pay bills in person.
- Half of households have abandoned landlines for cell phones only.
- They watch their favorite channels including QVC, CMT, and Game Show Network.
- They're fast food devotees.
- They enjoy outdoor activities such as camping and taking trips to the zoo.

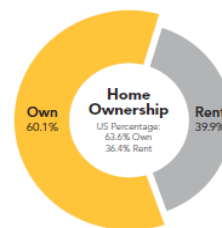
### HOUSING

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.



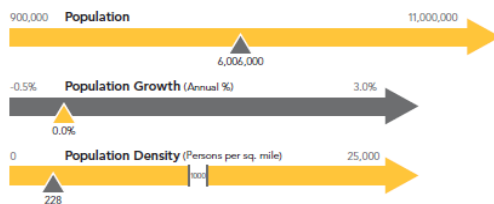
**Typical Housing:**  
Single Family

**Median Value:**  
\$79,000  
US Median: \$177,000



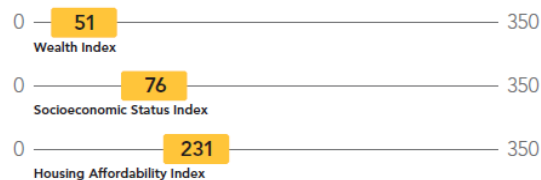
### POPULATION CHARACTERISTICS

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: Rustic Outposts Down the Road

10D

Households: 1,354,000

Average Household Size: 2.74

Median Age: 34.3

Median Household Income: \$36,000

### WHO ARE WE?

*Down the Road* is a mix of low-density, semirural neighborhoods in large metropolitan areas; half are located in the South, with the rest chiefly in the West and Midwest. Almost half of householders live in mobile homes; approximately two-fifths live in single-family homes. These are younger, diverse communities, with the highest proportion of American Indians of any segment. These family-oriented consumers value their traditions. Workers are in service, retail trade, manufacturing, and construction industries, with higher proportions in agriculture and mining, compared to the US. This market has higher unemployment, much lower median household income and home value, and a fifth of households with income below poverty level.

### OUR NEIGHBORHOOD

- Two-thirds of households are owned.
- Family market, primarily married couples or single-parent households (Index 145).
- Close to half of all households live in mobile homes (Index 808).
- Four-fifths of households were built in 1970 or later.
- About 18% of owned homes are valued under \$50,000 (over 3 times the US percentage).

### SOCIOECONOMIC TRAITS

- Education completed: 37% with a high school diploma only, 38% with some college education or a degree.
- Unemployment rate is 11.6%, higher than the US rate.
- Labor force participation rate is 59.6%, slightly lower than the US.
- Family-oriented, outgoing consumers; they place importance on preserving time-honored customs.
- They put a premium on convenience rather than health and nutrition.



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 MR.

## 10D LifeMode Group: Rustic Outposts Down the Road



### MARKET PROFILE

(Consumer preferences are estimated from data by GfK MR)

- Purchased a used vehicle in the past year, likely maintaining the vehicle themselves.
- Routinely stop by the convenience store to purchase a lottery ticket.
- Participate in fishing and hunting.
- Visit chat rooms and play games online.
- Listen to the radio, especially at work, with a preference for rap, R&B, and hip-hop music.
- Enjoy programs on Animal Planet, typically watching via satellite dish.
- Often prepare quick meals, using packaged or frozen dinner entrees.
- Favorite fast food: pizza.
- Frequent Walmart for all their shopping needs (groceries, clothing, pharmacy, etc.).

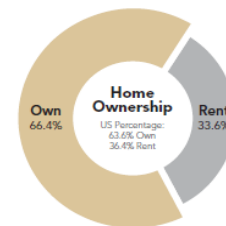
### HOUSING

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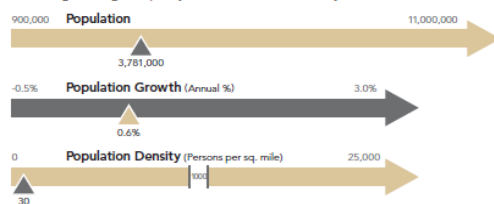
**Typical Housing:**  
Mobile Homes;  
Single Family

**Median Value:**  
\$104,000  
US Median: \$177,000



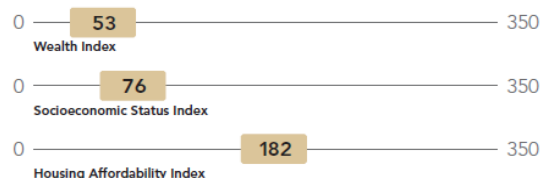
### POPULATION CHARACTERISTICS

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: Cozy Country Living**

## Salt of the Earth

**Households: 3,517,000**

**Average Household Size: 2.58**

**Median Age: 43.1**

**Median Household Income: \$53,000**

6B

### WHO ARE WE?

*Salt of the Earth* residents are entrenched in their traditional, rural lifestyles. Citizens here are older, and many have grown children that have moved away. They still cherish family time and also tending to their vegetable gardens and preparing homemade meals. Residents embrace the outdoors; they spend most of their free time preparing for their next fishing, boating, or camping trip. The majority has at least a high school diploma or some college education; many have expanded their skill set during their years of employment in the manufacturing and related industries. They may be experts with DIY projects, but the latest technology is not their forte. They use it when absolutely necessary, but seek face-to-face contact in their routine activities.

### OUR NEIGHBORHOOD

- This large segment is concentrated in the Midwest, particularly in Ohio, Pennsylvania, and Indiana.
- Due to their rural setting, households own two vehicles to cover their long commutes, often across county boundaries.
- Home ownership rates are very high (Index 132). Single-family homes are affordable, valued at 25 percent less than the national market.
- Two in three households are composed of married couples; less than half have children at home.

### SOCIOECONOMIC TRAITS

- Steady employment in construction, manufacturing, and related service industries.
- Completed education: 42% with a high school diploma only.
- Household income just over the national median, while net worth is double the national median.
- Spending time with family their top priority.
- Cost-conscious consumers, loyal to brands they like, with a focus on buying American.
- Last to buy the latest and greatest products.
- Try to eat healthy, tracking the nutrition and ingredients in the food they purchase.



Note: This index represents the ratio of the segment rate to the US rate multiplied by 100. Consumer preferences are estimated from data by GfK MRB.

## 6B LifeMode Group: Cozy Country Living Salt of the Earth



### MARKET PROFILE

(Consumer preferences are estimated from data by GfK MRB)

- Outdoor sports and activities, such as fishing, boating, hunting, and overnight camping trips are popular.
- To support their pastimes, truck ownership is high; many also own an ATV.
- They own the equipment to maintain their lawns and tend to their vegetable gardens.
- Residents often tackle home remodeling and improvement jobs themselves.
- Due to their locale, they own satellite dishes, and many still require dial-up modems to access the Internet.
- These conservative consumers prefer to conduct their business in person rather than online. They use an agent to purchase insurance.

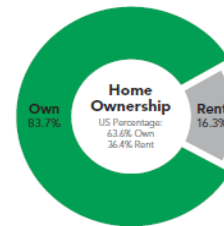
### HOUSING

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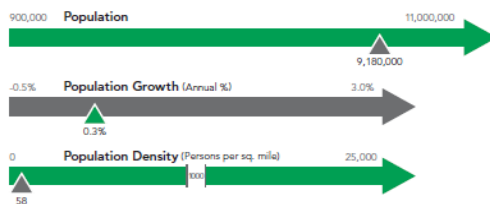
**Typical Housing:**  
Single Family

**Median Value:**  
\$134,000  
US Median: \$177,000



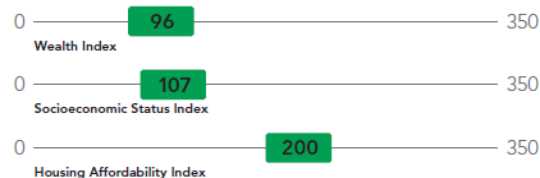
### POPULATION CHARACTERISTICS

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.



## Retail Market Analysis

Liberty and its commercial offerings serve the market defined in the previous section. The primary and secondary trade areas in particular are the basis for the analysis below. In this section, Liberty's retail market is examined to identify potential opportunities for retail growth through a **retail leakage** gap analysis. "Retail Leakage" refers to the difference between the retail expenditures by residents living in a particular area and the retail sales produced by the stores located in the same area. If desired products are not available within that area, consumers will travel to other places or use different methods to obtain those products. Consequently, the dollars spent outside the area are said to be "leaking." If a community is a major retail center with a variety of stores, it will be "gaining" rather than "leaking" retail sales. Even large communities may see leakage in certain retail categories. This section will look at the primary and secondary trade areas to see how much money is "leaking" from the area to stores in other areas.

### Retail Market Performance

Esri's Retail MarketPlace data provides a direct comparison between retail sales and consumer spending by industry. To capture a snapshot of an area's retail market place, the leakage and surplus factor summarizes the relationship between supply (retail sales by businesses) and demand (consumer spending by household). Deviations from potential sales may reveal areas of opportunity in the trade area's retail sectors, keeping in mind any extenuating circumstances that may be driving the results.

Esri uses the North American Industry Classification System (NAICS) to classify businesses by their primary type of economic activity. Retail establishments are classified into 27 industry groups within Retail Trade sector, and four industry groups within the Food Services & Drinking Establishments subsector. To estimate sales, the Retail MarketPlace database combines a number of data sources, including

- ► Census Bureau's Census of Retail Trade (CRT) and Monthly Retail Trade (MRT)
- ► Census Bureau's Nonemployer Statistics (NES)
- ► Esri's demographic data
- ► Infogroup
- ► Consumer Expenditure surveys from the Bureau of Labor Statistics

All estimates of actual sales (supply) reflect current dollars derived from receipts of businesses primarily engaged in selling merchandise. Potential sales (demand) is estimated by using Esri's consumer spending data which provides estimated expenditures for more than 700 products and services that are consumed by U.S. households. The estimate of a trade area's demand is based upon estimated expenditures by households within the trade area. Leakage within a specified trade area represents a condition where supply is less than demand. Retailers outside of the trade area are fulfilling demand for retail products. Surplus within a specified trade area represents a condition where supply exceeds the area's demand. Thus retailers are attracting customers that reside outside the trade area.

### Sales Surplus and Leakage Estimates

Total Retail Trade and Food & Drink demand versus sales estimates for the study areas show sizable sales leakage at the primary and secondary market levels, ranging from about \$14.4 million for the 5-minute drive time to nearly \$80 million for the 10-minute drive time area.

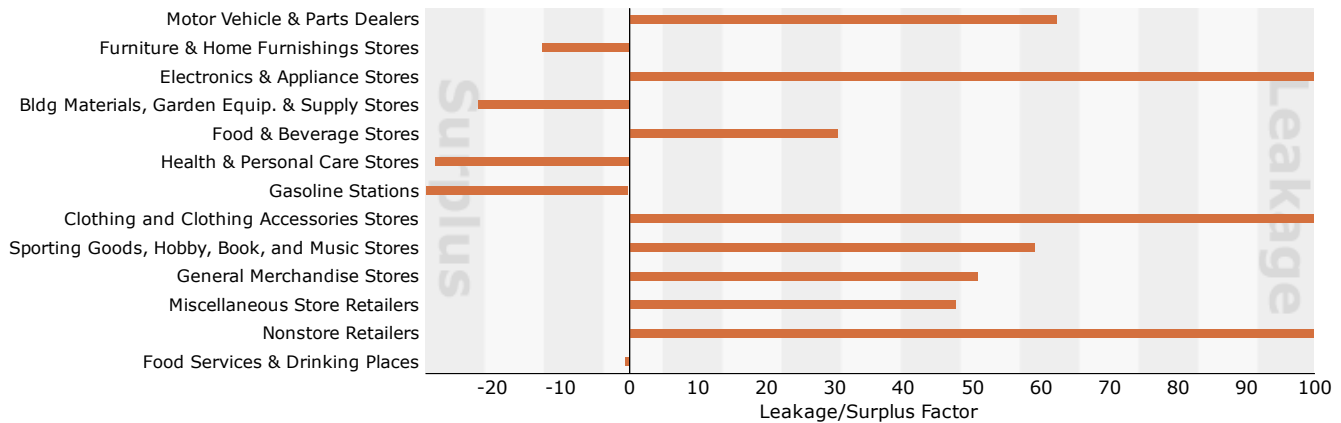
5 Minute Drive Time (Primary Market)					
Industry Summary	Demand (Retail Potential)	Supply (Retail Sales)	Retail Gap	Leakage/ Surplus Factor	# of Businesses
Total Retail Trade and Food & Drink (44-45,722)	\$42,879,733	\$28,428,783	\$14,450,950	20.3	38
Total Retail Trade (44-45)	\$39,231,205	\$24,736,518	\$14,494,687	22.7	26
Total Food & Drink (722)	\$3,648,528	\$3,692,266	-\$43,738	-0.6	12
10 Minute Drive Time (Secondary Market)					
Industry Summary	Demand (Retail Potential)	Supply (Retail Sales)	Retail Gap	Leakage/ Surplus Factor	# of Businesses
Total Retail Trade and Food & Drink (44-45,722)	\$213,316,139	\$125,860,949	\$87,455,190	25.8	116
Total Retail Trade (44-45)	\$194,377,353	\$114,980,731	\$79,396,622	25.7	86
Total Food & Drink (722)	\$18,938,786	\$10,880,218	\$8,058,568	27.0	30
15 Minute Drive Time (Outlying Market)					
Industry Summary	Demand (Retail Potential)	Supply (Retail Sales)	Retail Gap	Leakage/ Surplus Factor	# of Businesses
Total Retail Trade and Food & Drink (44-45,722)	\$659,595,644	\$899,527,447	-\$239,931,803	-15.4	529
Total Retail Trade (44-45)	\$600,046,842	\$815,907,555	-\$215,860,713	-15.2	370
Total Food & Drink (722)	\$59,548,801	\$83,619,892	-\$24,071,091	-16.8	159

Within both these areas the driving source of the leakage is in Retail Trade. Retail Trade sales surplus figures reported for the 5-minute drive time area are the sole source of leakage as total food and drink has a surplus in the primary market area. However, within the secondary market there is a gap of just over \$8 million that creates significant leakage within a 10-minute drive time of Liberty.

### Primary Market Analysis

The following table presents a breakdown of sales surplus and leakage estimates for 13 subsectors in the Retail Trade and Food Services & Drinking Places industry groups for the primary market area for Liberty. There are several categories that show significant leakage which means that residents are spending more for products than local businesses capture. Retail sales leakage suggests that there is unmet demand in the trade area and that the community can support additional store space for that type of business.

Leakage/Surplus Factor by Industry Subsector



### 5-Minute Drive Time Sales Potential

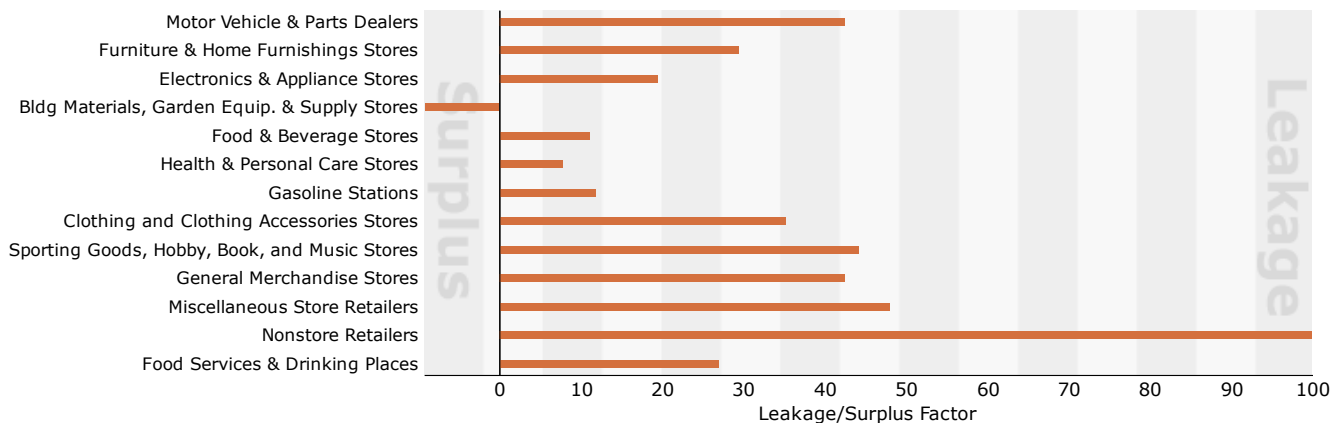
Industry Group	NAICS	Demand (Retail)	Supply (Retail)	Retail Gap	Leakage/Surplus Factor	Number of Businesses
Motor Vehicle & Parts Dealers	441	\$9,593,731	\$2,216,365	\$7,377,366	62.5	2
General Merchandise	452	\$6,638,933	\$2,161,800	\$4,477,133	50.9	3
Food & Beverage Stores	445	\$7,160,773	\$3,804,457	\$3,356,316	30.6	5
Electronics & Appliance	443	\$1,554,179	\$0	\$1,554,179	100.0	0
Clothing & Clothing Accessories Stores	448	\$1,377,891	\$0	\$1,377,891	100.0	0
Miscellaneous Retailers	453	\$1,854,263	\$656,830	\$1,197,433	47.7	4
Nonstore Retailers	454	\$868,995	\$0	\$868,995	100.0	0
Sporting Goods, Hobby, Book & Music Stores	451	\$947,467	\$242,243	\$705,224	59.3	1
Food Services & Drinking Places	722	\$3,648,528	\$3,692,266	\$43,738	-0.6	12
Furniture & Home Furnishings Stores	442	\$1,134,871	\$1,470,522	\$335,651	-12.9	2
Bldg Materials, Garden Equip. & Supply Stores	444	\$2,569,319	\$4,035,796	\$1,466,477	-22.2	3
Health & Personal Care	446	\$2,490,759	\$4,469,621	\$1,978,862	-28.4	3
Gasoline Stations	447	\$3,040,024	\$5,620,698	\$2,580,674	-29.8	4

Motor Vehicle & Parts Dealers, General Merchandise, and Food & Beverage stores present the greatest sales potential with a combined \$15 million in unmet sales demand in the market area. Two other areas of note are the Electronics & Appliance stores and Clothing stores which together have just over \$1.9 million in unmet demand but have no stores in the Primary Market area to serve that need. One positive for the Primary Market area is that several categories have sales that exceed expected demand. This means the City is drawing customers from surrounding markets which benefits the City.

### Secondary Market Analysis

The following table presents a breakdown of sales surplus and leakage estimates for the Secondary Market area for Liberty which is the 10 minute drive time area. The Secondary Market shows unmet retail potential in all categories except Building Material and associated businesses. There is considerable leakage in several categories. The two largest are consistent with the Primary Market with Motor Vehicle & Parts Dealers and General Merchandise accounting for roughly \$48 million of unmet sales. Retail sales leakage in the broad range of categories suggests that there are many opportunities to take advantage of unmet demand in the trade area and that the community can support additional store space for that several businesses.

Leakage/Surplus Factor by Industry Subsector



Other categories of note include Food Services and Drinking Places which show a significant retail gap of \$8 million in the Secondary Market. While Liberty's Primary Market showed virtually no gap this suggests that Liberty could still support additional restaurants if they are able to attract customers from the Secondary Market and beyond. In addition, the Clothing and Electronics categories shows additional demand in the Secondary Market that Liberty could take advantage of since they currently don't have any stores in their Primary Market area. Overall the unmet needs within the 10-minute driving radius of Liberty provide ample demand to support additional business to their downtown area.

### 10-Minute Drive Time Sales Potential

Industry Group	NAICS	Demand (Retail)	Supply (Retail)	Retail Gap	Leakage/Surplus Factor	Number of Businesses
Motor Vehicle & Parts Dealers	441	\$46,761,287	\$18,863,515	\$27,897,772	42.5	16
General Merchandise Stores	452	\$33,812,960	\$13,618,566	\$20,194,394	42.6	8
Food Services & Drinking Places	722	\$18,938,786	\$10,880,218	\$8,058,568	27.0	30
Food & Beverage Stores	445	\$35,718,690	\$28,509,319	\$7,209,371	11.2	10
Miscellaneous Store Retailers	453	\$8,892,100	\$3,127,544	\$5,764,556	48.0	13
Nonstore Retailers	454	\$3,910,093	\$0	\$3,910,093	100.0	0
Clothing & Clothing Accessories Stores	448	\$7,177,426	\$3,428,382	\$3,749,044	35.3	5
Gasoline Stations	447	\$15,077,681	\$11,879,954	\$3,197,727	11.9	7
Sporting Goods, Hobby, Book & Music Stores	451	\$4,766,093	\$1,842,695	\$2,923,398	44.2	4
Furniture & Home Furnishings Stores	442	\$5,876,211	\$3,196,034	\$2,680,177	29.5	4
Electronics & Appliance Stores	443	\$8,013,442	\$5,402,247	\$2,611,195	19.5	3
Health & Personal Care	446	\$12,136,253	\$10,371,639	\$1,764,614	7.8	6
Bldg Materials, Garden Equip. & Supply Stores	444	\$12,235,116	\$14,740,835	-\$2,505,719	-9.3	11



## Economic Development Strategies

The stakeholder input, as well as data and conclusions of the retail market analysis, were used to develop “emerging themes”. Based on further input from community stakeholders and additional market research, these themes were broken into four economic development strategies. Each of these strategies is described in detail below.

### Strategy One: Business Recruitment and Retention

#### Issues

Key issues regarding business recruitment and retention are as follows:

- The Liberty market has a local market base but also experiences a considerable amount of retail spending leakage to markets outside of Liberty.
- There is a lack of critical mass for some types of retail establishments that would attract customers to downtown.
- Several market gaps and key opportunities have been identified in the retail leakage study.

#### Goal

“By 2020, the City of Liberty will recruit the restaurants, specialty shops, and customer base to support a vibrant downtown core and a robust retail corridor along U.S. 178 & Main Street.”

#### Recommendations

**Encourage the development of a downtown specialty shopping and dining district.** Opportunities to market shopping and dining should focus on two primary desired markets:

*The local resident.* Liberty residents comprise the largest market share for local businesses. The local customer must remain engaged and be a marketing target for any business to be sustainable.

*The regional customer.* Liberty should work to establish themselves as a regional draw. As the retail base matures in Liberty, the community should be able to broaden its appeal as a regional shopping destination.

In the short term, the objective should be to create critical mass of retail and food offerings. In the medium-term, the focus should shift to nights and weekends as opportunities to activate the downtown core in the evenings and weekends. Promoting existing special events and developing ongoing programming at the McKissick Center are an important part of activating the downtown. In general, the City should leverage the existing festivals and local events to do much of the heavy lifting in terms of attracting people to downtown.

**Continue existing and launch new marketing assistance initiatives for retailers and restaurateurs.**

Liberty should explore a variety of ways to promote local businesses through print material, collateral items, and online resources. Some suggestions to improve the marketing material include the following:

*Develop a new shopping and dining guide to the community in both print and online forms.* This guide might include special events, a directory of shops and dining establishments, and other information for visitors. This could be distributed at the McKissick Center, Clemson University, and in shops and restaurants in Liberty as well as nearby community centers.

*Create a link-to-link program among businesses in downtown Liberty to elevate both the businesses and the district on Google searches.* Each business would link to others in the district as well as to a website. Google's search algorithms strongly elevate businesses and districts that are linked.

**Recruit appropriate businesses and attractions into downtown based on retail market data.** This report provides a solid basis of data to use to recruit desired businesses to Liberty. One way to start the recruitment process would be for the Liberty Chamber of Commerce to host an open house to provide information to potential business owners, connect them with property owners,

**Launch a volunteer-based business recruitment team.** Many communities have formed programs that involve grassroots recruitment of retailers interested in expanding into new markets. Liberty should consider a similar group that could share economic information about this study with potential retailers interested in expanding in the community. This effort could be spearheaded by the Liberty Chamber of Commerce, and could "lead the charge" to recruit additional businesses to the City.

**Develop a local loyalty program for restaurants and shops.** To encourage greater exploration of local businesses and to spur customer browsing, the City and Chamber could partner with a high school or college-level marketing class to develop a loyalty program that helps local businesses feed off of one another's customer base.

**Develop a facade grant program.** A façade grant program can leverage public monies to spur private investment in downtown's building stock. The program could be extended to downtown commercial properties to improve their appearance and improve the overall attractiveness of downtown Liberty.

## Strategy Two: Managing Infill Development

Key issues regarding infill development in Liberty are as follows:

- Streetscape improvements have set the table for development, yet work remains to be done on Main Street as well as on key arterial roads.
- The City needs to take a closer look at incentives, marketing tools, and guidelines/expectations for property owners and future investors.
- Derelict properties remain a problem throughout the City, especially along key corridors and at major intersections.
- Unless the City has a proactive strategy for infill development, City leadership will have to react to what others propose.

## Goal

“Liberty will continue to develop as a complete community, filling in vacant sites, rehabilitating existing buildings, and improving its streetscape.”

## Recommendations

**Examine the regulatory environment to encourage property upkeep.** The City should examine its current code enforcement regulations in order to streamline processes to more easily allow for proactive code enforcement. Proactive code enforcement will help protect business and residential investments and also create a Liberty that is more desirable for potential investors and residents.

**Continue to implement citywide streetscape improvements.** The City’s recent downtown streetscape project has been a remarkable success and should be continued in the coming years. The City should focus on arterial corridor improvements.

**Create and maintain an “Available Properties” database.** Establish a baseline for a database of available commercial properties that can be provided to prospective entrepreneurs. The Liberty Chamber of Commerce may be the ideal group to take ownership of this inventory, as it would help with business-to-business relationships and recruitment initiatives.

## Strategy Three: Cultivating the Destination

### Issues

Key issues related to cultivating Liberty as a destination are as follows:

- Downtown Liberty is practically closed in evenings and on Sunday afternoons. This represents both a significant challenge and an opportunity for downtown retailers.

## Goal

“Liberty will work to develop a pedestrian-friendly shopping and dining destination in their downtown that provides a high-quality of living for residents and visitors.”

## Recommendations

**Continue to host large-scale events like seasonal festivals.** Events like downtown festivals draw visitors to the area, create awareness of local offerings, and provide an opportunity to foster community pride and promote the Liberty brand.

**Consider a weekly event series to attract people downtown on a regular basis.** Sometimes small regularly held events can be more valuable than extravagant annual events. The events should always be located in an area where participants can see the retail shops and should, whenever possible, actually involve the local shopkeepers. Sundays in warm-weather months may be a good time to capture a family audience, and well-attended events would signal to local businesses that Sundays are viable. The City could work with area restaurants as well as chain restaurants to provide family-friendly food options.

## Strategy Four: Organization and Partnerships

### Issues

Key issues regarding organization and partnerships in Liberty include the following:

- The City enjoys many strong partnerships, and has potential for even more.
- There is no protocol or staffing strategy for engaging potential investors.
- There are many different ways to address such issues.

### Goal

“The City, Chamber of Commerce, and other partners will unite to implement economic development initiatives and ensure ongoing activity and growth in the community.”

### Recommendations

**Organize a committee to promote the findings of this study.** This data and recommendations are only as valuable as they are known in the community and region. The City and Liberty Chamber of Commerce should present this information to civic groups, regional partnerships, developers, and property owners to ensure that many people know the efforts that are about to take place.

**Develop a “Go Team” for economic development initiatives.** There are a number of groups that may play a role in development activity in Liberty. This is particularly true of large-scale commercial development and the creation of catalyst projects in the community. Liberty should be poised to have a development team in place that involves the City, Chamber, and other partners as needed.

**Explore ways to foster downtown investment.** There are many creative ways that an innovative community can explore to foster investment in downtown. The conventional wisdom has been that a community must recruit or wait for a developer to assemble capital and invest in a building. Several evolving models are turning the traditional thinking upside down. Some options to consider might be: *Downtown Renovation Corporation*. This would be a private sector investment “club” to buy, renovate, and repurpose downtown buildings. The most direct way of raising capital to ensure that downtown is in a position for investment is through a capital campaign that could be dedicated to purchasing and renovating buildings. As a donation effort, the return on investment is the overall health of downtown allowing the maximum flexibility to find the right investors, tenants, and owners for buildings. Greer, South Carolina has succeeded in raising nearly \$7 million in ten years through capital campaigns. This investment has transformed their downtown from a near empty declining district into one of the most successful small towns in the Upstate.

**Strengthen relationships between community partners.** The City should work to enhance working relationships between the Liberty Chamber of Commerce, the Alliance Pickens, Meals on Wheels of Pickens County, and Pickens County. While many of these organizations are already strong community partners, the City of Liberty stands to gain from enhanced working relationships with these parties. Many of the recommendations in this report provide examples of how these partners can work together on various projects.

