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# Media Kit

## 2024

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## ABOUT US AT A GLANCE

RetailStat is a one-stop provider of financial, credit, and locational intelligence tailored to retail and retail real estate leaders seeking swift, data-driven decisions. Meticulously gathering and analyzing credit and locational data from both public and private sources, RetailStat transforms raw information into actionable reports and valuable insights. RetailStat's mission is to simplify complex data, providing vital support to diverse customer segments including consumer product companies, retailers, retail real estate owners, investors, and lenders. These stakeholders benefit from our extensive industry experience with subject matter experts in all areas of retail and retail real estate, our focus on our clients' workflows and a broad suite of products to make astute, strategic business decisions. For more information, visit [www.retailstat.com](http://www.retailstat.com).

## HISTORY

For over thirty years, we've serviced clients through a range of trusted brands to drive better decision making through reliable data, insights, and analytics. Today, RetailStat unites those brands as an industry-leading retail intelligence provider dedicated to unwavering quality and client services. Today, RetailStat has more than 100 employees, monitors over 425 companies across 30 retail segments, and offers nearly 10,000 lists providing essential data points sourced from its regularly updated real estate database."



## RETAILSTAT STORY

RetailStat is a premier provider of financial, credit, and locational intelligence tailored for leaders in retail and retail real estate who seek faster data-driven decision-making. Focused on primarily North American brands, both private and public, RetailStat adeptly collects and analyzes retail credit and locational data, subsequently transforming this data into actionable, fact-based reports and invaluable insights. The Company amasses, synthesizes, and simplifies complex information for a diverse set of customer segments, including consumer product companies, retailers, retail real estate owners, investors, and lenders. These stakeholders rely on RetailStat's team of experts to make astute, strategic business decisions regarding retail brands, both financially and locationally.

RetailStat's product portfolio provides services through two primary segments, RetailStat Financial and RetailStat Location. The financial intelligence products facilitate credit decisions across the retail landscape and deliver research, analytics, and insights on hundreds of public and private retailers. This information is generated by our seasoned, industry-focused analyst team. Additionally, the geospatial intelligence products seamlessly combine nearly 1 million up-to-date retail locations, foot-traffic data, demographics, and proprietary algorithms to generate powerful analytics and insights at the shopping center and individual storefront levels. Together, these services offer clients a 360-degree view of retailer and retail real estate performance and potential opportunities.

Subscribers benefit from tailored services and can customize which products they receive based on their individual needs, building a customized portfolio of data, reports, workflows, and analysis. RetailStat reports span a spectrum of categories, including news alerts, private company coverage, quarterly earnings analyses, analyst consultations, daily Chapter 11 briefings, industry insights, retail segment benchmarking updates, and more. Additionally, the services offered include access to a payment trends database, retail foot traffic insights, automated monitoring alerts, industry credit scoring, bankruptcy notification, an industry-leading database of supplier payment history, future store openings and closings, store overlap analysis, and sales per square foot intelligence. RetailStat offers personalized consulting services facilitated by our expert analysts and advisory team. These professionals deliver tailor-made solutions to address critical challenges and identify avenues for growth and transformation within their businesses.

RetailStat, along with its former brands CreditIntell and F&D Reports, is headquartered in New York. For further details, please visit [www.retailstat.com](http://www.retailstat.com).

### Who uses RetailStat's Products?

RetailStat's products cater to a diverse range of clientele spanning various industries within the retail ecosystem. Our valued customers include consumer product companies, retailers, retail real estate owners and investors, lenders, and more.

### What Industries does RetailStat serve?

RetailStat specializes in the following industries:

- Retail
- Apparel
- Arts & Crafts
- Auto Parts
- Books /toys /Gaming
- Convenience Stores/Distributors
- Cruise Lines
- Department Stores
- Drug Retailers
- Electronics / Distributors
- Experiential
- Facility & Support Services
- Foodservice Distributors
- Footwear
- Furniture / Mattress
- Grocery
- Grocery Wholesale
- Gym / Fitness
- Health /Beauty
- Home Improvement / Building Materials
- Housewares & Home Furnishings
- Jewelry & Accessories
- Mass Merchandisers
- Movie Theaters
- Office & Computer
- Pet Care
- Pharmaceutical / Medical Distributors & Healthcare
- Restaurants
- Specialty / Other
- Sporting Goods
- Real Estate
- Finance

## FAST FACT SHEET



### How many years has RetailStat been in business?

**67.** RetailStat has been in business for 67 years. Founded in 1957 in Great Neck, NY, Information Clearinghouse Inc. evolved to become a leading global provider of credit intelligence across various business segments. RetailStat was formed when Information Clearinghouse Inc. (ICI) merged its industry-leading intelligence providers Creditntell, F&D Reports, ARMS, AggData, and MTN under a unified brand in 2023. In December 2021, New York City-based Endicott Growth Equity Partners announced that it acquired a majority stake in ICI.



### How many companies does RetailStat monitor

**Approximately 500.** RetailStat's analyst team monitors roughly 500 private and public companies across 30 retail segments and offers nearly 10,000 lists providing essential data points sourced from its regularly updated real estate database. ARMS' credit report database includes comprehensive profiles on over 30,000 industry operators.



### How many industries does RetailStat monitor?

**More than 30.** RetailStat monitors more than 30 industries. For more information on RetailStat's monitored industries, visit [www.retailstat.com](http://www.retailstat.com)



### Where is RetailStat headquartered?

**New York City, New York.** RetailStat is based in New York, but has employees situated all over the United States.



### Alongside retail, does RetailStat specialize in grocery data?

**Yes.** RetailStat features a specialized team of 14 seasoned financial analysts and real estate professionals, each with over a decade of experience in the grocery industry. Our analysts meticulously cover over 100 grocers and conduct approximately 20,000 store visits annually, ensuring accurate boots-on-the-ground data.



### How many points of interest make up the POI product datasets?

**Millions.** RetailStat's POI library comprises over 9,300 lists, with more than 1,000 lists updated monthly. The library also includes over 1,000 distributor lists and over 1,000 closed lists. The dataset encompasses more than 6,900 locations in the United States and 3,700 locations internationally. Each list guarantees at least 14 metadata points.



### How many reports does RetailStat produce each year?

**Thousands.** RetailStat's analyst team works around the clock to deliver thousands of comprehensive company and industry analyses throughout the year each year.



### Does RetailStat offer customized studies to meet specific client needs?

**Yes.** We collaborate closely with our clients to address strategic questions using our data sets, models, and expert insights.



### What sets RetailStat apart from similar solutions?

**Our expert analysts.** RetailStat's expertise is what sets it apart. Across both the financial and locational sides of the business, everything we do – from data to workflow tools, reports, and expert advice – is driven and quality-checked by the trained eyes of our retail experts.



## LEADERSHIP & SUBJECT MATTER EXPERTS

At RetailStat, our team of media-ready, subject matter experts loves collaborating with publications and influencers to enhance stories with curated, data-driven content. Below are just a few of our experts:

### Sondra Scott, Chief Executive Officer



Sondra Scott has been the Chief Executive Officer of RetailStat since 2022, bringing a wealth of experience in executive leadership. Previously, she served as the CEO for the U.S. and Europe at ADEC Innovations, leading a team in providing ESG, environmental, and sustainability strategy solutions. With a robust background, Sondra has held pivotal roles as the COO of Verisk Financial and President of Verisk Maplecroft, as well as various leadership roles at Wood Mackenzie.

Sondra's multifaceted career is complemented by her commitment to environmental and social causes. She serves on the board of Gran Tierra Energy and is the Chairman and Co-Founder of the UK nonprofit Girl Stats, an organization that develops tools, data analytics, and insights to highlight the risks faced by women in global supply chains. She holds a Bachelor's Degree in Economics and Earth Sciences from Wesleyan University and a Master's Degree in Petroleum Engineering and Economics from the University of Pennsylvania and Institut Français du Pétrole.

### Robert Marzo, Head of Content & Analytics



Robert (Bobby) Marzo, Head of Content and Analytics at RetailStat, has been a key member of the executive leadership team since joining in 2004. In his current role, Bobby leads a dynamic team of financial and credit analysts responsible for analyzing the financial health of retailers and advising clients on managing and mitigating risk. He has played a pivotal role in positioning RetailStat as an industry leader by driving continuous improvements in analysis and spearheading the successful launch of cutting-edge financial products and advisory services.

Bobby is widely recognized as an expert in retail and credit risk analysis. With two decades of experience, he has not only contributed to RetailStat's success but has also become a trusted advisor to major CPG companies and landlords worldwide.

### Gregg Katz, Head of Product Innovation & Marketing



Gregg Katz has served as RetailStat's Head of Product Innovation and Marketing since 2021. Gregg's focus is to provide enhanced strategic insights into industry trends, market dynamics, and consumer shopping behavior by leveraging best-in-class data and analytics. Before his current role, Gregg spent 15 years at TSCG (The Shopping Center Group) creating and implementing strategies for organizational structure and human capital, data, analytics, social platforms, websites, GIS, mobile technology, and branding. Prior roles include 15 years in restaurant operations, consulting, marketing, and site selection, including owning and operating a quick-casual restaurant group in Orlando, Florida.

A graduate of Boston University with a degree in Business Management, he received his MBA from the University of Florida (Go Gators!). Gregg and his wife Elena, are the proud parents of two amazing boys.

## John Tippetts, Head of Grocery Locational Data & Research



John Tippetts co-founded MTN Retail Advisors, an industry leader in grocery retail research and data nationwide, which was acquired by RetailStat in 2021. As part of RetailStat, John has contributed in various leadership capacities before assuming his current role as Head of Grocery Locational Data & Research. With roots dating back to 1982, John boasts over a decade of experience in numerous store management positions within the grocery industry. His journey into site location and consumer research began in 1998, during his tenure as a Senior Site Location Analyst for Kroger.

Outside of his professional endeavors, John has obtained certifications in retail management and data analysis. These academic achievements not only expanded his knowledge base but also equipped him with the skills to navigate the intricate dynamics of the retail landscape. Today, John seamlessly integrates his practical expertise with his academic insights, playing a pivotal role in RetailStat's mission to deliver cutting-edge locational data and research services to clients.

## Andrew Mearns, Head of Retention



Andrew Mearns joined RetailStat in January 2024 as the Head of Retention. Andrew brings a wealth of experience in building client relationships and helping customers utilize and derive value from data and research products. Before joining RetailStat, Andrew led multiple high-performing teams at S&P Global Market Intelligence, mostly in the fast-moving technology, media, and telecom sectors. It was at S&P Global where Andrew also developed a deep understanding of credit, strategy, and M&A workflows.

Andrew holds a bachelor's degree in philosophy from the University of Virginia in Charlottesville – where he still resides today. Andrew remains involved with the university as a mentor to undergraduate students and as a fan of their sports teams. He and his wife, Abigail, enjoy spending time with their family and others in their community.

## Josh Suffin, Head of Real Estate Services



Josh Suffin joined RetailStat in 2011, where he has held multiple leadership positions and has been instrumental in introducing new marketing initiatives and product offerings, particularly within the retail real estate segment. Through his diligent efforts with key players in the growing customer base, Josh has innovated and created a new array of services and networking events tailored to meet the diverse needs of this industry. Equipped with extensive real estate expertise and an expansive network, he now leads the company's growth efforts within this major sector.

In addition to his professional accomplishments, Josh attained his BA in Entrepreneurship from Hofstra University, laying the foundation for his career in the dynamic realm of business innovation.

## Doug Munson, Head of Advisory Business Development



Doug Munson co-founded MTN Retail Advisors, an industry leader in nationwide grocery retail research and data. When RetailStat acquired MTN in 2021, Doug brought specialized experience in identifying and validating potential grocery retail locations, as well as assessing the viability of retail shopping centers. His journey in the grocery industry began in 1986, starting at the store level. Doug held previous positions with Smith's Food's (Kroger) in the Site Location/Real Estate department and with Giant Food Stores as Director of Site Location, where he played a pivotal role in developing real estate strategy for the Giant banner in Pennsylvania and Maryland. Today, Doug leads RetailStat in Consultancy, overseeing the facilitation of site location, customer insight, and market planning services for numerous retailers, landlords, and institutional investors.

Beyond his professional pursuits, Doug earned his BA in Business Administration from the University of Pennsylvania, where his passion for retail and real estate first flourished.

## MEDIA EXPERTS



### **Stacie Malinowski, Head of Consultancy Operations**

Stacie Malinowski has led as the Head of Consultancy Operations at RetailStat since 2023, leveraging over 15 years of expertise in commercial real estate research and marketing. She has numerous specialties including operations, locational data, data mining, and creative marketing strategies, which she honed through her tenure with REITs Regency Centers and Federal Realty before transitioning into consultancy.

Residing in Northern Virginia, Stacie is dedicated to her family, balancing her professional achievements with her role as a mother of five sons and grandmother of two grandsons. A passionate wine enthusiast, she holds WSET certification in wine and spirits. Stacie's academic journey includes her Bachelor's Degree in Political Science from Michigan State University enriching her professional acumen.

### **Albert Furst, Executive Vice President**

Al Furst joined the RetailStat team in 1998. Over his illustrious 25-year career with RetailStat, Al gained a wealth of expertise in the grocery industry and currently serves as Executive Vice President. In this role, he dedicates his time to providing analysis and credit consulting to numerous consumer product suppliers, landlords, and other creditors. His contributions span various aspects including store expansion, performance evaluation, M&A impact, debt assessment, and solvency analysis. Al's extensive track record includes advising on numerous grocers and grocery wholesalers that underwent acquisitions or faced bankruptcy, showcasing his deep understanding of the industry's complexities.

Alongside his impressive career, Al Furst attended Hofstra University, where he earned his MBA with a specialization in Finance. This educational journey not only deepened his understanding of financial matters but also honed his skills in retail management and data analysis.



### **Taylor Ricketts, Assistant Vice President**

Taylor Ricketts, Assistant Vice President, joined RetailStat in 2018, bringing over 15 years of astute analysis within the grocery and food wholesale sectors. His comprehensive experience spans both CPG environments and consultancy roles, advising clients across real estate and financial sectors. Taylor's expertise lies in discerning grocery trends and identifying sector winners and losers, contributing significantly to improving returns for his clients.

Outside of his professional pursuits, Taylor received his Master's Degree in Economics and Finance from the University of North Carolina at Greensboro (UNCG) in 2008. This education, combined with his practical insights, equips him to navigate the intricate dynamics of the retail landscape seamlessly.



## OUR VALUES

### Transparency

As a leading retail intelligence provider, an ethical approach informs everything we do. We make sure our clients have trustworthy resources and tools at their disposal to assess risk, analyze trends and make informed decisions.

### Integrity

Our clients can count on us for reliable, thoroughly vetted market intelligence and analysis, as well as unflinching data protection and governance practices. Doing the right thing is the only option for every team member at RetailStat.

### Client-First

We put our clients' needs first, acting as a responsive, trusted partner to help them gain the insights and understanding they need to move their business forward.

### Innovation

By employing experts at the top of their field and maintaining the latest technology capabilities, we're able to deliver the latest in assessment and analytics for retail and retail real estate leaders. Our clients can count on us for the most advanced, efficient methods for optimized decision making.



## CUSTOMER TESTIMONIALS

“ RETAILSTAT KEEPS ME UPDATED ON A DAILY BASIS OF OUR FINANCIAL LIABILITIES, INCLUDING OUR SMALL & MID-SIZE CUSTOMERS THAT TEND TO FLY UNDER THE RADAR OF SOME OF THE OTHER CREDIT AGENCIES. RETAILSTAT HAS ALL THE BASES COVERED FROM DAILY EMAIL ALERTS, CUSTOMER MARKET INSIGHT REPORTS AS WELL AS A NEWLY UPDATED TRADE HISTORY & PAYMENT TREND SITE. ”

CORDERO GUYTON, Ricola 

“ WITH LIMITED INTERNAL RESOURCES (HEADCOUNT) MY TEAM WOULD NOT BE ABLE TO CONTINUE TO SUPPORT A GROWING PORTFOLIO WITHOUT ARMS PROVIDING US WITH THEIR SERVICES. BESIDES THE SERVICES THAT ARMS PROVIDES, IT'S THE SUPPORT OF THEIR PEOPLE THAT SETS THEM APART FROM OTHERS. THEY UNDERSTAND AND TRULY CARE ABOUT THE SUCCESS OF THEIR CLIENTS ”

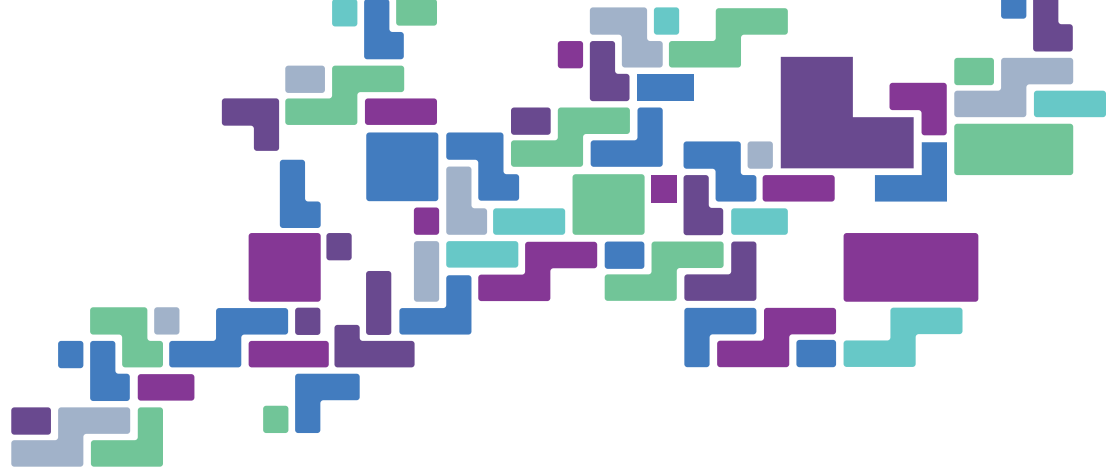
STU STURL, Sargento Foods 

“ OUR TEAM WAS ABLE TO UTILIZE RETAILSTAT'S REI PLATFORM WHICH HAS PARTNERED WITH SPATIAL.AI'S PERSONALIVE TOOL TO SHOW THAT THE TOP 4 PERSONAS IN OUR TRADE AREA WERE ABOVE THE NATIONAL AVERAGE FOR HOUSEHOLD INCOME, HOME OWNERSHIP, COLLEGE DEGREES, AND HOUSEHOLDS WITH CHILDREN - ALL DATA SETS THAT THIS GROCER LOVES TO SEE. USING THIS DEEP UNDERSTANDING OF THE PSYCHOGRAPHICS IN THIS MARKET, WE WERE ULTIMATELY ABLE TO COME TO TERMS ON A DEAL WITH THIS SPECIALTY GROCER WHICH IS SCHEDULED TO OPEN IN EARLY 2024 AND WILL BE A TRANSFORMATIONAL EVENT FOR THIS ASSET AND THIS COMMUNITY ”

DAVID GERSTENHABER, Brixmor 

## BRANDS THAT TRUST US





CONNECT WITH US TO EXPLORE A WEALTH OF  
INSIGHTS, SPEAK WITH OUR MEDIA-READY EXPERTS,  
AND UNCOVER VALUABLE RESOURCES FOR YOUR  
NEXT RETAIL STORY

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Contact **Gregg Katz**, RetailStat Head of Marketing,  
at [greggk@retailstat.com](mailto:greggk@retailstat.com) to request an interview or data source.