URBAN GEOANALYSIS

Chapultepec

Guadalajara, Jalisco

Report generated on August 25, 2026

GEOGRAPHIC INTELLIGENCE FOR INVESTMENT DECISIONS

Understand the market. Detect demand. Find the opportunity.

ISOCHRONE OF 5 MINUTES BY CAR

POPULATION	ECONOMIC ACTIVITY	COMMERCIAL ACTIVITY	MONTHLY SPEND	OPPORTUNITIES
16,992 RESIDENTS	**54,295** JOBS	**15,271** COMMERCIAL ACTIVITY INDEX	**$209.4 M** MXN	**10** RECOMMENDED CATEGORIES
66.3% SEL C y C-	**3.2x** jobs per resident	**89.9%** vs. population	**$33,781** average per household	**35** with unmet demand

KEY FINDINGS

In this 5-minute drive isochrone along Chapultepec Avenue, Guadalajara, 54,295 jobs coexist with only 16,992 residents — a 3.2-to-1 ratio that defines an employment corridor, not a residential neighborhood.

The core opportunity lies in daily-need services for the local workforce — chain coffee shop, pharmacy, beauty salon, laundry — with gaps of 56% to 71% against an almost entirely informal supply.

TECHNICAL SHEET

Points of interest	4,505
Economic units	4,340
Households	7,885 total · 6,198 occupied (78.6%)
Coordinates	20.6696, -103.3682
Sources	Census 2020, EC 2024, ENIGH 2024
Report date	August 25, 2026

01 · INTRODUCTION

Why does this analysis reduce the risk of your investment?

This report analyzes a 5-minute drive isochrone centered on Chapultepec Avenue, in the Colonia Americana neighborhood of Guadalajara, Jalisco, within the Guadalajara Metropolitan Area and a short distance from the Historic Center and Parque Revolución (Parque Rojo). An isochrone delimits the real territory from which a customer can reach a business within that travel time: it is the true market, not an arbitrary circle on a map.

Geomarketing combines geographic, demographic and economic data to answer, with evidence, the questions that define the success of a commercial investment. The data comes from INEGI (2020 Population Census, 2024 Economic Census and 2024 ENIGH household survey), processed with MktCompass's statistical model.

- Who are my potential customers and how much do they spend?
- How many businesses similar to mine already exist in the area?
- Which categories have unmet demand and represent a real opportunity?

Why decide with data?	Description
HARD DATA	Official INEGI censuses and surveys with nationwide coverage and rigorous methodology.
PRECISION	Exact geographic delimitation of the potential market by real travel time.
INSIGHTS	Actionable findings that reduce investment risk and improve decision-making.
ACTION	Identification of opportunities with unmet demand and saturated categories to avoid.

> *With the method in place, the first step is to understand who lives in this area in depth: how many they are, how they are distributed, and what their real purchasing power is.*

02 · SOCIOECONOMIC PROFILE OF THE POPULATION

Who lives here, how many are they, and how high is their purchasing power?

The Socioeconomic Level (SEL) is a classification tool that groups households by their spending capacity, education level and access to services. In Mexico the AMAI model uses the levels A/B (high), C+ (upper-middle), C (middle), C– (lower-middle), D+/D (working class) and E (very low). For any business or franchise, the SEL is the first filter: it determines which prices, products and strategies are appropriate for the area.

Socioeconomic distribution of the population

SEL	Population	% of total	Analysis vs. national average
Población NSE AB y C+	4,253	25%	Average
Población NSE C y C-	11,274	66.3%	Very High
Población NSE D+, D, E y NA	1,465	8.6%	**Low**
Total population	16,992	100%	—

The socioeconomic structure is dominated by SEL C and C- (66.3% of the population, Very High versus the national average), with 25.0% in AB and C+ and only 8.6% in D+, D and E (Low). This is a middle-income area, not a premium one — but it should be read alongside the employment profile, which is noticeably higher (see Section 03).

Population distribution by age group

Age group	Population	% of total	Analysis vs. national average
0 a 4 años	476	2.8%	Very Low
5 a 9 años	490	2.9%	Very Low
10 a 14 años	540	3.2%	Very Low
15 a 19 años	617	3.6%	Very Low
20 a 24 años	1,396	8.2%	**Low**
25 a 29 años	1,512	8.9%	Very High
30 a 39 años	2,903	17.1%	Very High
40 a 49 años	1,745	10.3%	Very Low
50 a 59 años	1,584	9.3%	Very Low
60 a 69 años	1,306	7.7%	**Low**
70 años o más	1,019	6%	Average
Total population	16,992	100%	—

The population is heavily concentrated between 25 and 39 years old (26.0% combined, both groups Very High versus the national average), while residents under 15 fall well below average across all three age brackets (Very Low): a profile of young adults and professionals, not families with young children.

Key demographic data

Indicator	Value	% / Reference	Analysis
Total population 2020	16,992	100%	—
Total population 2010	17,435	Growth: -2.5%	**Low**
Female population	8,540	50.3%	—
Male population	8,248	48.5%	—
EAP (economically active population)	10,214	60.1%	**High**
Population with social security	786	4.6%	Very Low
Population without social security	3,904	23%	**Low**
Total dwellings	7,885	—	—
Occupied dwellings	6,198	78.6% occupancy	—

Population fell -2.5% between 2010 and 2020 (Low versus the national average), while the area's job base is more than triple its population (jobs-to-population ratio of 3.2). This is consistent with an urban corridor that has tilted toward commercial and office use, although this indicator alone does not confirm it (a stated inference, not verifiable from this data point in isolation). The economically active population (PEA) stands at 60.1% (High). Of the economically active population, 3,904 people are reported without social security coverage (Low versus the national average) and 786 with registered social security (Very Low); the source reports both indicators separately. 78.6% of the area's 7,885 total dwellings are occupied.

Household goods (penetration)

Good or service	Households	% penetration	Analysis
Energía eléctrica	5,767	93%	Very Low
Drenaje	5,766	93%	Very Low
Energía eléctrica, agua entubada de la red pública y drenaje	5,755	92.9%	Very Low
Agua entubada y se abastecen del servicio público	5,732	92.5%	**Low**
Refrigerador	5,684	91.7%	**Low**
Teléfono celular	5,437	87.7%	Very Low
Televisor	5,394	87%	Very Low
Internet	5,014	80.9%	Average
Lavadora	4,926	79.5%	**Low**
Computadora, laptop o tablet	4,350	70.2%	**High**

60.0% of households own a car (Average) and 70.2% have a computer, laptop or tablet (High), but the most distinctive figure is the 26.6% of households that use a bicycle as a means of transportation, well above the national average (Very High): any business here must plan for pedestrian and cyclist access, not just parking.

Estimated monthly household spending (ENIGH 2024)

Spending category	Monthly estimate (MXN)	% of total	Analysis
Alimentos y bebidas consumidas dentro del hogar	$46.6 M	22.2%	Average
Transporte; mantenimiento, accesorios y servicios para vehículos	$36.1 M	17.3%	Average
Vivienda y servicios de conservación	$20.3 M	9.7%	Average
Refacciones, partes, accesorios, mantenimiento, combustibles y servicio para vehículos	$14.7 M	7%	**High**
Educación servicios y artículos	$13.4 M	6.4%	Average
Alimentos y bebidas consumidas fuera del hogar	$11 M	5.3%	Average
Cuidados personales	$10.2 M	4.9%	Average
Comunicaciones (teléfono, internet, celular, tv paga)	$9.9 M	4.7%	Average
Electricidad y combustibles	$8.1 M	3.8%	Average
Artículos y servicios para la limpieza y cuidados de la casa	$7.9 M	3.8%	**Low**
ESTIMATED TOTAL	$209.4 M	100%	—

Estimated monthly household spending totals $209.4 million (about $33,781 per occupied household), with overweighting in vehicle parts and maintenance (High, 7.0% of spend) and in pregnancy and childbirth medical spending (High, specific line items): these are pointed signals, not a generalized premium spending pattern — the area's real purchasing power lives more in employment than in resident consumption.

Key socioeconomic insights

01

TWO ECONOMIES IN ONE CORRIDOR

The typical resident is SEL C/C-, but 22.6% of the area's jobs are SEL ABC+ (Very High versus the national average): a proposition built only for the resident leaves out the segment with the greatest purchasing power, which arrives here to work every day.

02

YOUNG ADULTS, FEW CHILDREN

With 26.0% of the population aged 25 to 39 and residents under 15 well below average, businesses built for families with young children do not find their natural market here; those built for young professionals do.

03

ACTIVE MOBILITY AS AN ADVANTAGE

26.6% of households use a bicycle as a means of transportation, well above the national average: businesses with good pedestrian and cyclist access capture a segment that parking alone does not solve.

04 POPULATION SHRINKING, EMPLOYMENT DOMINATING

The -2.5% population decline over the decade should not be read as a fading market: the dominant signal in this area is employment, not residential (see Section 03).

16,992 residents	**-2.5%** 2010-2020 growth	**66.3%** SEL C and C-
26.0% population aged 25-39	**60.0%** households with a car	**26.6%** households with a bicycle (Very High)
$209.4 M monthly spend	**$33,781** spend per household	**6,198** occupied dwellings

> *Residents are only part of the market: more than three times that number arrive each day as workers. Let's see how many they are and what their profile looks like.*

03 · ECONOMIC PROFILE: EMPLOYMENT AND BUSINESS ESTABLISHMENTS

How many employees move through this area daily, and how formal is the business ecosystem?

Local employment defines weekday, working-hours consumption: in an area where jobs outnumber residents three to one, daily-need and personal-service businesses live more off the worker than the resident.

Employment distribution by sector

Sector	Jobs	% of total	Analysis vs. average
Sector 1: Agricultura, mineria, pesca y ganaderia	72	0.1%	**Low**
Sector 2: Industrial y energía	7,897	14.5%	Very High
Sector 3: Comercio	12,699	23.4%	**Low**
Sector 3: Servicios	31,987	58.9%	Average
Sector 4: Tecnologías y comunicación	1,640	3%	Very High
TOTAL	54,295	100%	—

Services account for 58.9% of employment (Average) and commerce 23.4% (Low versus average), but the most telling figure is the overrepresentation of the industrial sector (14.5%, Very High) and technology (3.0%, Very High): a corridor of professional offices and technical activity, not a traditional retail neighborhood.

Employment distribution by SEL

Employee SEL	Estimated jobs	% of total	Analysis
Estimación de empleos de NSE ABC+	12,247	22.6%	Very High
Estimación de empleos de NSE C y C-	27,705	51%	**Low**
Estimación de empleos de NSE D+,D y E	14,343	26.4%	Very Low
TOTAL	54,295	100%	—

22.6% of jobs correspond to SEL ABC+ (Very High versus the national average) and only 26.4% to SEL D+, D and E (Very Low): the area's jobs are, on average, better quality than the national average.

Business establishments by size

Size	Count	% of total	Analysis	Representative type
Unidades económicas 1 a 5 empleos	2,799	64.5%	**Low**	Small practices, small law offices, neighborhood coffee shops
Unidades económicas 6 a 25 empleos	1,265	29.1%	Very High	Restaurants, dental clinics, mid-sized firms

Size	Count	% of total	Analysis	Representative type
Unidades económicas 26 a 100 empleos	194	4.5%	**High**	Established law firms, banks, mid-sized corporate offices
Unidades económicas >100 empleos	82	1.9%	**High**	Office towers and large corporate campuses
TOTAL	4,340	100%	—	—

Micro-businesses (1 to 5 employees) make up 64.5% of economic units, below the national average (Low) — the opposite of the usual pattern in Mexico: 35.5% are small, medium or large businesses, with a far more formal and institutional payroll than average.

Key economic insights

01

NEARLY TRIPLE THE JOBS OF RESIDENTS

54,295 jobs against 16,992 residents (a 3.2 ratio) make office hours, not the weekend, the strongest opportunity window for almost any daily-need business.

02

FORMALITY AS A SIGN OF STABILITY

The unusually low share of micro-businesses (64.5%, Low) against 35.5% small, medium and large businesses implies more formal payrolls and predictable, recurring weekday spending.

03

A PROFESSIONAL-SERVICES CORRIDOR

Overrepresented technical and technology employment (Very High), together with 142 units in the Legales (legal services) category and 100 in Bancos (banks) in the business directory, describe a corridor of professional and financial services, not heavy manufacturing, despite the weight of the industrial sector in the aggregate employment figure.

54,295 total jobs	**58.9%** in services	**23.4%** in commerce
14.5% in industrial (Very High)	**22.6%** SEL ABC+ jobs	**4,340** economic units
35.5% non-micro businesses	**64.5%** micro-businesses (Low)	**1,541** small businesses or larger

> *Residents plus workers make up the potential market. The next question is how much of that mass turns into active commercial foot traffic — and the CAI measures that with precision.*

04 · LEVEL OF COMMERCIAL ACTIVITY

How many active people move through the area, and at what times is there the most activity?

The Commercial Activity Index (CAI) measures employment in sectors that generate foot traffic and shoppers: coffee shops, pharmacies, retail, entertainment, restaurants, bars and personal services. The higher the CAI, the more active consumers move through the area each day.

The total points of interest in this report (4,505) and the Economic Census total of business units (4,340) differ because they list different business categories with different counting methodologies within the area — this is a normal methodological note, not a data discrepancy.

Commercial Activity Index: 15,271 — LOW classification in absolute volume (HIGH threshold: 100,000 / AVERAGE: 40,000-100,000).

The CAI-to-total-jobs ratio is 28.1% and the CAI-to-population ratio is 89.9%: commercial activity is proportional to the area's population size, but low relative to the enormous workforce that crosses it daily. The correct reading: the area sustains comparison and impulse categories mainly through the demand of those who work here and through differentiation from the nearby competing hub, not through weekend foot traffic.

Key points of interest by category (Top 10 by volume)

Category	Count	Leading brands	Relevance for daily foot traffic
Otros restaurantes chicos	188	Independientes sin marca reconocida	Midday quick food for the workforce, high weekday turnover
Consultorios privados	188	Independientes sin marca reconocida	High-dwell-time appointment traffic; nearby pharmacies and coffee shops can capture the flow
Legales	142	Bufetes jurídicos, Notarías públicas, Servicios de apoyo para efectuar trámites legales	Law firms dominate this category (69%); professional, appointment-driven traffic, not pass-through
Pisos	137	Independientes sin marca reconocida	—
Salones de belleza	131	Salón de belleza o estética, Barberías, Spa o masajes	Recurring visits; a base for complementary personal-care services
Actividades Manufactureras	111	Impresión de formas continuas y otros impresos, Productos de herrería, Artículos de alfarería, porcelana y loza	—
Artículos para el hogar	106	Telas, Cristalería, loza y utensilios de cocina, Alfombras y cortinas	—

Category	Count	Leading brands	Relevance for daily foot traffic
Maquinaría y equipo	104	Equipo y material eléctrico, Independientes sin marca reconocida, Para otros servicios y para actividades comerciales	—
Bancos	100	Cajero bancario, Santander, Banorte IXE	Mid-morning errands; captive foot traffic at the ATM
Consultorios dentales privados	89	Independientes sin marca reconocida	—

Leading brands in the highest-presence categories

Category	Total	Leading brand (loc.)	% of category	Second brand (loc.)
Otros restaurantes chicos	188	Independientes sin marca reconocida (188)	100%	—
Consultorios privados	188	Independientes sin marca reconocida (188)	100%	—
Legales	142	Bufetes jurídicos (98)	69%	Notarías públicas (29)
Pisos	137	Independientes sin marca reconocida (137)	100%	—
Salones de belleza	131	Salón de belleza o estética (80)	61.1%	Barberías (18)
Actividades Manufactureras	111	Impresión de formas continuas y otros impresos (36)	32.4%	Productos de herrería (7)
Artículos para el hogar	106	Telas (24)	22.6%	Cristalería, loza y utensilios de cocina (18)
Maquinaría y equipo	104	Equipo y material eléctrico (37)	35.6%	Independientes sin marca reconocida (27)
Bancos	100	Cajero bancario (51)	51%	Santander (12)
Consultorios dentales privados	89	Independientes sin marca reconocida (89)	100%	—

Commercial activity insights

01

WORKER CONSUMPTION, NOT VISITOR CONSUMPTION

The weekday morning window has a jobs-to-population ratio of 3.2, the highest of the three windows measured: the dominant traffic arrives to work, not to stroll.

02

UNDERESTIMATED GENERATOR: THE OFFICE AND LAW-FIRM CORRIDOR

188 units of Consultorios privados (private medical offices) and 142 of Legales (legal services) generate high-dwell-time appointment visits that nearby pharmacies, stationery stores and coffee shops can capture without relying on pass-through traffic.

03

WEEKDAY EVENING POTENTIAL, NOT WEEKEND

The weekday evening window is also estimated as HIGH (jobs weighted by extended-presence POI share over population, close to 1.5): the dining and coffee corridor already consolidated as a cluster (Cafetería de especialidad +304.8%, Mariscos +483.3%, Bares +240.9%) confirms after-work traffic exists, even though the weekend CAI is low.

04

A MARKET MOSTLY WITHOUT A FORMAL BRAND

Of the main opportunity categories in Section 05, most have no recognized brand at all; where one does exist (Starbucks, Sanborns, Soriana, Cinepolis, Oxxo, chain pharmacies), no single player dominates the category — fertile ground for the first consistent, formal brand.

> *The traffic map is clear. The critical question for investment: which categories have proven unmet demand, and which are saturated and should be avoided?*

05 · BUSINESS OPPORTUNITIES

Which businesses have unmet demand, and which should I avoid due to extreme saturation?

The MktCompass model compares the existing businesses in each category against the expected average for an area with these characteristics of population, employment and commercial activity.

Important note: the number of businesses is only the first filter. A seemingly saturated category may still hold opportunity if the existing offering is low quality or does not serve the area's dominant SEL. Always validate with field research.

One or more categories in this table are classified as Cluster: the number found is more than triple what the model would expect for a zone this size. This isn't just any oversupply — it's a commercial concentration that draws customers from a wider area, as happens in shopping centers with dozens of stores in the same category or in dining corridors dense with restaurants and bars. It's classified as a risk for a new business, but with nuance: a differentiation strategy built on quality, variety, atmosphere, or specialization can compete successfully within a cluster, tapping into destination traffic that already exists. It's never presented as a gap-based opportunity; if it appears in a recommendation, it's always framed as a deliberate differentiation play, not a market gap.

One or more categories in this table are classified as Low Supply: the gap between what was found and what was expected is so extreme that it may reflect a structural limitation — the zone's socioeconomic profile, a lack of suitable retail space or shopping centers, hard-to-obtain special permits, or the type of avenue — rather than genuine unmet demand. The information available isn't enough to tell which of these causes applies in each case, so this report does not recommend these categories as business opportunities.

CONVENIENCE PRODUCTS AND SERVICES (3-5 MINUTE DRIVE, 10 MINUTE WALK)

Category	Found	Expected	Analysis	Leading brands
Cafetería de cadena	2	7	**Opportunity**	Black Coffee, Starbucks
Carne de ave	6	9	**Opportunity**	Independents predominate
Carnicerías	7	23	**Opportunity**	Independents predominate
Frutas y verduras	8	23	**Opportunity**	Independents predominate
Paletas y helados	14	26	**Opportunity**	Dolphy
Papelerías	23	50	**Opportunity**	Independents predominate
Pastelería	4	10	**Opportunity**	Independents predominate
Perfumerías	14	27	**Opportunity**	Independents predominate
Tienda de abarrotes	82	154	**Opportunity**	Independents predominate
Tiendas de bebidas	3	5	**Opportunity**	Independents predominate
Tiendas de conveniencia	35	60	**Opportunity**	Oxxo, 7Eleven
Tiendas de vinos y licores	14	22	**Opportunity**	Tecate Six

Category	Found	Expected	Analysis	Leading brands
Cadena F. Nacional	16	24	**Opportunity**	Benavides, F. del Ahorro
F. Independiente	8	26	**Opportunity**	Independents predominate
Comida típica	52	89	**Opportunity**	Independents predominate
Gimnasios	14	30	**Opportunity**	Gimnasio, Centro deportivo
Lavanderías/Tintorerías	21	48	**Opportunity**	Independents predominate
Artículos de uso personal	60	37	**Risk**	Anteojos y lentes, Artículos ortopédicos
Cafetería de especialidad	85	21	**Cluster**	Independents predominate
Pescadería	0	6	**Low Supply**	—
Tortillería	5	27	**Low Supply**	Independents predominate

The pattern is consistent: everyday food-supply, personal-care and coffee categories show severe gaps and almost no formal brand presence, while bike shops and specialty coffee are already saturated or consolidated as a cluster.

COMPARISON PRODUCTS AND SERVICES (5-10 MINUTE DRIVE, 15 MINUTE WALK)

Category	Found	Expected	Analysis	Leading brands
Supermercados	2	8	**Opportunity**	Soriana
Tiendas de deportes	6	17	**Opportunity**	Independents predominate
Tiendas de mascotas	7	11	**Opportunity**	Independents predominate
Tiendas departamentales	1	4	**Opportunity**	Sanborns
E. Básica públicas	9	36	**Opportunity**	Independents predominate
E. Básica-Media privadas	6	11	**Opportunity**	Independents predominate
E. Básica-Media públicas	1	2	**Opportunity**	Independents predominate
Boliches	1	0	**Opportunity**	Independents predominate
Cines	1	2	**Opportunity**	Cinepolis
Salones para eventos	9	17	**Opportunity**	Independents predominate
Cadenas otras	1	4	**Opportunity**	Subway
Hamburguesas	11	17	**Opportunity**	Hotdogs, Carls Junior
Otros restaurantes grandes	2	3	**Opportunity**	Independents predominate
Autolavados	8	19	**Opportunity**	Independents predominate
Moteles	1	3	**Opportunity**	Independents predominate
Salones de belleza	131	303	**Opportunity**	Salón de belleza o estética, Barberías

Category	Found	Expected	Analysis	Leading brands
Otro tipo de ropa	67	113	Opportunity	Independents predominate
Tienda de lencería	5	7	Opportunity	Independents predominate
Tiendas de bicicletas	7	3	Risk	Independents predominate
Tiendas de electrodomésticos	16	8	Risk	Independents predominate
Alitas	7	5	Risk	Alas Wings, Wingman
Carnes	11	7	Risk	Independents predominate
Comida saludable	7	3	Risk	Independents predominate
Otros restaurantes chicos	188	126	Risk	Independents predominate
Servicios de revelado e impresión de fotografías	2	1	Risk	Independents predominate
Tiendas de cómputo y accesorios	30	5	Cluster	Independents predominate
Bares	75	22	Cluster	Independents predominate
Mariscos	35	6	Cluster	Independents predominate
Casinos	0	7	Low Supply	—
Carnitas y chicharrones	1	5	Low Supply	Independents predominate
Pollos	3	16	Low Supply	Pollo Rostizado
Ropa de dama	0	4	Low Supply	—
Ropa de marca	0	6	Low Supply	—
Ropa infantil	0	6	Low Supply	—
Tienda de accesorios	0	6	Low Supply	—
Zapatería	5	26	Low Supply	Independents predominate

In comparison goods and services, the area combines real gaps in health, beauty and general apparel with extreme, highly concentrated saturation in destination dining (seafood, bars, computers and accessories): two different stories under the same subsection.

SPECIALTY PRODUCTS AND SERVICES (10-15 MINUTE DRIVE)

MktCompass model notice: the analyzed isochrone is smaller than the valid range for this subsection (10-15 minutes by car); with such a small area it cannot be concluded whether the number of businesses per category is below, equal to, or above the expected amount. Only the inventory of counts found is presented, without an opportunity or risk classification, and its categories are not candidates for gap-based recommendations.

Sector	Category	Count found
Comercio	Joyerías	0
Comercio	Jugueterías	4

Sector	Category	Count found
Comercio	Lámparas ornamentales y candiles	4
Comercio	Mueblerías	62
Comercio	Tiendas de instrumentos musicales	1
Educación	E. Media privadas	18
Educación	E. Media públicas	2
Educación	Educación especial	2
Educación	Escuela de artes	11
Educación	Escuelas de Computación	0
Educación	Escuelas de deportes	8
Educación	Escuelas de idiomas	12
Entretenimiento	Teatros	1
Finanzas	Cajas de ahorro popular	3
Finanzas	Casas de cambio	1
Finanzas	Casas de empeño	0
Restaurantes	Centros nocturnos	7
Salud	Clínicas privadas	9
Salud	Hospitales privados	7
Salud	Laboratorios privados	29
Servicios	Hoteles	45

Key opportunity insights

01

CAFETERÍA DE CADENA: THE CORRIDOR'S LEAST FORMALIZED CATEGORY

2 found against 7 expected (-71.4%) in the convenience subsection, in the area with the highest jobs-to-population ratio in the whole analysis: two brands present (Black Coffee, Starbucks) without clear dominance leave room for a third player.

02

PERSONAL SERVICES WITH THE LARGEST ABSOLUTE GAP

172 Salones de belleza (beauty salons) are missing (131 of 303 expected, -56.8%), fragmented across 8 categories with none above 61.1% of the category: enough volume for a chain format with clear standards.

03

EXTREME RISK: BICYCLE SHOPS AND HEALTHY FOOD ARE SATURATED

Tiendas de bicicletas (bike shops) and Comida saludable (healthy food) both exceed expectations by +133.3%; entering either without a radically different concept is a bet against the statistics, even given the area's high bicycle use (26.6% of households, Very High).

04

A PHARMACY GAP NEXT TO A HEALTH CLUSTER

8 independent pharmacies against 26 expected (-69.2%), around the corner from 188 private medical offices and 89 private dental offices: the health demand is already there, the nearby medication supply is not.

05

THE LARGEST CLUSTER DOESN'T HAVE A SINGLE BRAND

85 Cafetería de especialidad (specialty coffee shops) against 21 expected (+304.8%, cluster), 100% independent with no recognized brand: the destination traffic already exists, but nobody is capturing it with consistent branding.

> *With the gaps quantified and the competitive profile clear, the next step is concrete: the ten businesses with the highest probability of success, in order.*

06 · STRATEGIC BUSINESS RECOMMENDATIONS

What are the 10 businesses with the highest probability of success in this specific area?

The following recommendations cross three filters: proven supply gap in the applicable subsections (Section 05), alignment with the area's SEL and spending patterns (Section 02), and job mass and foot traffic (Sections 03-04). The assumed investor profile is an individual or neighborhood-scale format ($300 thousand to $5 million MXN). Outside that scope are anchor formats that exceed this range — Supermercados (supermarkets, -75.0%, Soriana present), Tiendas departamentales (department stores, -75.0%, Sanborns present) and Cines (movie theaters, -50.0%, Cinepolis present) — which represent a real opportunity, but for a larger operator, not for this section's scorecard. Positions 9 and 10 are reserved for a declared differentiation play within already-consolidated clusters, per the area's doctrine: they don't compete on the gap, they compete on quality within traffic that already exists.

1

Cafetería de cadena — chain coffee shop

71.4% gap (2 found against 7 expected) in the convenience subsection, in the area with the highest jobs-to-population ratio in the analysis (3.2). Two brands present (Black Coffee, Starbucks) without clear dominance; the 22.6% SEL ABC+ job share supports a chain-level ticket.

SEL: SEL ABC+ and C+ (via employment) | Age: 25-45 | Gender: Mixed | Competition: LOW | Peak hours: Mon-Fri 7:00-10:00 and 13:00-16:00

2

Carnicería — butcher shop

69.6% gap (7 against 23 expected), a 100% independent market with no recognized brand, in a daily-need category for the area's 6,198 occupied households.

SEL: SEL C and C- | Age: 30-59 | Gender: Mixed | Competition: LOW | Peak hours: Mon-Sat 8:00-19:00

3

Pharmacy — independent or regional chain (F. Independiente / Cadena F. Nacional)

A double gap in this category: independent pharmacies at -69.2% (8 against 26) and national chain pharmacies at -33.3% (16 against 24, with Benavides and Farmacias del Ahorro present but insufficient). Demand is backed by 188 private medical offices and 89 private dental offices nearby.

SEL: SEL C, C- and ABC+ (via medical offices) | Age: All ages | Gender: Mixed | Competition: LOW | Peak hours: Every day 8:00-21:00

4

Frutas y verduras — produce store

65.2% gap (8 against 23 expected), a 100% independent market. The high rate of bicycle use as a means of transportation (26.6% of households, Very High) is consistent with a young resident profile with active-mobility habits.

SEL: SEL C and C- | Age: 25-45 | Gender: Mixed | Competition: LOW | Peak hours: Mon-Sat 7:00-15:00

5

Pastelería — bakery / pastry shop

60.0% gap (4 against 10 expected), no formal brand in the category. It naturally complements the chain-coffee-shop opportunity and the office-worker traffic flow.

SEL: SEL C and C-, ABC+ via employment | Age: 25-45 | Gender: Mixed | Competition: LOW | Peak hours: Mon-Fri 7:00-19:00, Sat 9:00-15:00

6

Autolavado — car wash

57.9% gap (8 against 19 expected), 100% independent. 60.0% of households own a car, and thousands of workers leave their cars parked all day during the workday: a 'wash while you work' service captures that dead time without depending on weekend traffic.

SEL: SEL C and C- | Age: 25-55 | Gender: Mixed | Competition: LOW | Peak hours: Mon-Fri 8:00-18:00

7

Salón de belleza — beauty salon with chain-level standards

The largest absolute gap in the analysis: 172 units are missing (131 against 303 expected, -56.8%), fragmented across 8 categories with none above 61.1% of the category. With 26.0% of the population aged 25 to 39, there is a recurring customer base for a format with digital appointment booking.

SEL: SEL C and C- | Age: 25-39 | Gender: Mixed | Competition: LOW | Peak hours: Mon-Sat 10:00-19:00

8

Lavandería / tintorería — laundry and dry cleaning

56.2% gap (21 against 48 expected), 100% independent. It fits directly with the time-poor office-worker profile: the 3.2 jobs-to-population ratio is the strongest single signal in the entire report that this area lives off the worker, not the resident.

SEL: SEL C and C-, ABC+ via employment | Age: 25-55 | Gender: Mixed | Competition: LOW | Peak hours: Mon-Fri 8:00-19:00

9

Cafetería de especialidad — declared differentiation play (cluster)

A consolidated cluster (+304.8%, 85 against 21 expected), 100% independent with no recognized brand: destination traffic already exists, but nobody captures it with consistent branding or a loyalty program. This is a differentiation play, not a gap play: enter to compete on quality and experience within a corridor that already functions as a coffee hub, not to open new demand.

SEL: SEL ABC+ and C+ (via employment) | Age: 22-40 | Gender: Mixed | Competition: HIGH — destination cluster, no dominant brand | Peak hours: Mon-Fri 8:00-13:00 and Saturday afternoon

10

Tiendas de cómputo y accesorios — declared differentiation play (cluster)

The most extreme cluster in the report (+500.0%, 30 against 5 expected), 100% independent. With 142 units in Legales, 100 in Bancos, and a workforce of 54,295 office jobs, demand for tech support, supplies and equipment repair is structural, not incidental; a format with warranty and on-site office service competes on service quality, not price.

SEL: SEL ABC+ (via office employment) | Age: 25-50 | Gender: Mixed | Competition: HIGH — destination cluster, no dominant brand | Peak hours: Mon-Fri 9:00-19:00

Days and hours of highest general consumption

Business type	Peak days	Peak hours	Consumer type
Coffee and breakfast	Mon-Fri	7:00-10:00	Office and medical-office employees on their way to work
Daily-need shopping and midday meal	Mon-Fri	13:00-16:00	Workers on their lunch break, residents
Personal services (salon, laundry, car wash)	Mon-Sat	10:00-19:00	Workers after office hours and residents

Business type	Peak days	Peak hours	Consumer type
Destination dining and coffee (already-consolidated clusters)	Thu-Sat	19:00-23:00	Workers leaving the office, corridor diners

Categories to avoid — Extreme saturation

CATEGORIES NOT RECOMMENDED DUE TO EXTREME SATURATION:

Tiendas de bicicletas (bike shops, 7 against 3 expected, +133.3%) and Comida saludable (healthy food, 7 against 3, +133.3%) sit at the highest saturation level in the report. Tiendas de electrodomésticos (appliance stores, 16 against 8, +100.0%) and Artículos de uso personal (personal-use items, 60 against 37, +62.2%, led by optical and orthopedic goods) round out the list. The Mariscos (seafood dining, +483.3%) and Bares (bars, +240.9%) dining clusters are also saturated: they are only viable as a declared differentiation play, never as a direct bet on the gap.

Key success factors in the area

- Design hours and staffing around the workforce flow (3.2 jobs-to-population ratio), not around a residential neighborhood: the strong window is Monday through Friday, morning and evening.
- Respond with a concrete differentiator against the nearby competing commercial hub in comparison categories where it directly competes: walkable proximity, speed and personalized service.
- Solve for pedestrian and cyclist access, not just parking: 26.6% of households use a bicycle as a means of transportation, well above the national average.
- Calibrate pricing for two distinct audiences under the same roof: the SEL C/C- resident (66.3% of the population) and the higher-SEL office worker (22.6% of jobs are SEL ABC+).
- Formalize where the market is still informal: in most of the recommended categories, all current supply is independent with no recognized brand — the first consistent brand has a first-mover advantage.

> *With the ten bets ranked, it's time to step back: how the area classifies as a whole, and what risks anyone deciding to invest here should know.*

07 · AREA CLASSIFICATION AND RISKS

How is this area classified, and what are the commercial risks you should know before investing?

Area classification

Type of area	EMPLOYMENT ZONE — a 3.2 jobs-to-population ratio (54,295 jobs against 16,992 residents, HIGH band ≥1.5) with a CAI-to-jobs ratio of 28.1% (LOW band <40%): the corridor functions primarily as a weekday employment destination, not as a residential neighborhood or a weekend foot-traffic hub.
Spending capacity	MIXED, WITH TWO SPEEDS — the resident population is predominantly SEL C and C- (66.3%), but 22.6% of jobs correspond to SEL ABC+ (Very High versus the national average): daily worker spending lifts effective purchasing power above what resident SEL alone would suggest.
Customer profile	Young professionals aged 25 to 39 (26.0% of the population, Very High versus average) employed across the office, law-firm and medical-office corridor, plus a smaller resident core with high non-motorized mobility (26.6% by bicycle, Very High).
Commercial activity	CAI of 15,271, LOW classification (below 40,000) but with a CAI-to-population ratio of 89.9%: activity is proportional to the area's population weight, not a sign of a dead market. The real ceiling is serving the 54,295 jobs that already cross the area daily, not attracting more weekend visitors.

Main commercial risks

Commercial risk	Level
CAI classified as LOW: weekend visitor traffic is limited, and comparison and impulse businesses depend almost entirely on weekday demand	High
Extreme saturation in seafood dining, bars and specialty coffee (clusters of +240% to +500%): entering without a clearly differentiated proposition is a high-risk bet	High
A consolidated commercial hub a short drive away competes for comparison categories such as general apparel and sporting goods	Medium
Resident population in decline (-2.5% 2010-2020) while employment concentrates: the fixed weekend customer base is smaller than in a purely residential neighborhood	Medium
Partial car dependency combined with a high share of non-motorized mobility (26.6% bicycle): businesses without good pedestrian and cyclist access leave out a relevant segment	Low

Key success factors

- The corridor lives off those who work here, not those who stroll through: any financial model should anchor on weekday flow, not the weekend.
- Near-total informality in the opportunity categories is both the risk and the opportunity: the first business to formalize each category gets the first-mover advantage.

- The nearest commercial hub competes on comparison retail, not on daily-need services: that is the safest ground for entry.

> *The risks are manageable with the right strategy. One dimension remains that conventional analyses ignore: the social data that opens opportunities with a positive impact.*

08 · SOCIAL CONSIDERATIONS

What social data opens up business opportunities with a positive impact on the community?

Market analysis cannot ignore the social aspects of the area. These data reveal both the responsibilities of the businesses that settle here and opportunities for business models with positive social impact and proven commercial returns.

Education and human capital

Educational indicator	People	% of population
15 años y más analfabeta	79	0.5%
15 años y más sin escolaridad	91	0.5%
15 años y más con primaria completa	647	3.8%
15 años y más con secundaria completa	1,294	7.6%
18 años y más con educación posbásica	10,612	62.5%

Disability in the area

Type of disability	People	% of population
Población con alguna discapacidad	563	3.3%
Caminar, subir o bajar	212	1.2%
Ver, aun usando lentes	119	0.7%
Hablar o comunicarse	24	0.1%
Oír, aun usando aparato auditivo	48	0.3%
Vestirse, bañarse o comer	56	0.3%
Recordar o concentrarse	43	0.3%
Con algún problema o condición mental	183	1.1%

Population origin

Indicator	People	% of population
Población nacida en otra entidad	2,898	17.1%
Población de 3 años y más que habla alguna lengua indígena	23	0.1%

Key social insights

01

ACCESSIBILITY AS A COMPETITIVE ADVANTAGE

Disability prevalence is below the national average (3.3% of the population, Low), but nearly all current supply in the categories analyzed is informal: an accessible format with clear service standards has an immediate edge over fragmented competition, without needing a large niche market to justify it.

02

SKILLED HUMAN CAPITAL

62.5% of the population aged 18 and older has post-basic education (High versus the national average): skilled talent to recruit for the recommended categories, and a customer base that expects consistency and good service, not just price.

03

A MIXED COMMUNITY, WITHOUT NEWCOMER DOMINANCE

17.1% of residents were born in another state (Average versus the national average): a community with a meaningful newcomer presence but without overtaking the local resident base — a favorable combination for new concepts that still need a recurring customer base.

> *With the demographic, economic, commercial and social context complete, it's time to synthesize the argument into actionable conclusions.*

09 · CONCLUSIONS AND NEXT STEPS

The area in 3 facts

3.2 jobs per resident	A market mostly without a formal brand	Enter on weekdays, not weekends
The corridor is, above all, an employment destination: 54,295 jobs against just 16,992 residents.	The ten recommended businesses face a supply dominated by independents, with no consolidated brand competition.	The low CAI confirms that weekend visitor traffic is limited: this bet is won or lost Monday through Friday.

The best bets — Opportunity scorecard

Recommended category	Opportunity	Competition
Cafetería de cadena	**HIGH**	Low — 2 brands present without dominance (Black Coffee, Starbucks)
Salón de belleza	**HIGH**	Low — fragmented across 8 categories, none above 61%
Pharmacy — independent or regional chain	**HIGH**	Low — national chains present but insufficient
Lavandería / tintorería	**HIGH**	Low — no formal brands
Carnicería	**HIGH**	Low — no formal brands

● HIGH opportunity (unmet demand + aligned SEL + low formal competition) ● MEDIUM opportunity (real demand but with greater competition or required investment)

The 2 risks you cannot ignore

Risk 1 — The weekend isn't the business

With a CAI classified as LOW, the area does not draw weekend visitors at the volume of a consolidated commercial corridor. A financial model that depends on Saturday and Sunday traffic to be profitable isn't calibrated to this area: the safe bet lives Monday through Friday.

Risk 2 — The nearby hub competes on comparison, not on necessity

A consolidated shopping center is a short drive away and can absorb part of the spending on general apparel and sporting goods. The daily-need categories recommended in this report — pharmacy, beauty salon, laundry, butcher shop — do not compete directly with that format.

Letter to the Investor

We found a corridor that works far more than it lives: many more people arrive here to work each day than actually live here, and nearly all the supply that serves them is still informal, unbranded, inconsistent.

The bet isn't to compete for the weekend visitor, who is scarce here, but to solve what that workforce needs on weekdays: a reliable morning coffee, a place to leave the car clean while at work, a pharmacy next to the medical office, a salon that doesn't depend on luck to find good service. Whoever formalizes these categories first keeps a captive customer base that today has nowhere else to go.

The corridor already has the traffic. What's missing is someone to meet it with a business worthy of it.

Recommendations for deeper study

- Comparative analysis with MktCompass: replicate this analysis across multiple areas of the city to compare isochrones and evaluate which location has the best balance of demand and lowest direct competition for the chosen category.
- Consumer-habit surveys in the area: validate with real consumers what they buy, where, how often, and what they find missing in the current offering.
- Mystery-shopper visits to competitors: assess quality, price, service and traffic at the existing businesses in the categories of interest.
- Vehicle and pedestrian counts at intersections of interest to estimate real traffic at different times and days of the week.
- Interviews with residents and employees about habits, needs and willingness to spend in the categories identified as opportunities.

Geomarketing · Guadalajara, Jalisco · 5-min drive isochrone | INEGI 2020 Census · 2024 EC · 2024 ENIGH + MktCompass