



Demographic and Income Profile

Fm 518 at West Ranch
 FM 518 & W Ranch Dr, Friendswood, TX 77546
 Ring: 1 mile radius

Latitude: 29.49233
 Longitude: -95.17257

Summary	2000	2010	2015
Population	2,020	2,913	3,080
Households	660	936	987
Families	574	821	864
Average Household Size	3.06	3.11	3.12
Owner Occupied Housing Units	593	822	868
Renter Occupied Housing Units	67	114	119
Median Age	34.3	36.2	35.7
Trends: 2010 - 2015 Annual Rate	Area	State	National
Population	1.12%	1.65%	0.76%
Households	1.07%	1.63%	0.78%
Families	1.03%	1.48%	0.64%
Owner HHS	1.09%	1.72%	0.82%
Median Household Income	1.83%	2.54%	2.36%

Households by Income	2000		2010		2015	
	Number	Percent	Number	Percent	Number	Percent
< \$15,000	18	2.6%	17	1.8%	13	1.3%
\$15,000 - \$24,999	26	3.8%	25	2.7%	18	1.8%
\$25,000 - \$34,999	47	6.9%	39	4.2%	28	2.8%
\$35,000 - \$49,999	107	15.7%	100	10.7%	55	5.6%
\$50,000 - \$74,999	200	29.3%	226	24.2%	253	25.7%
\$75,000 - \$99,999	116	17.0%	161	17.2%	183	18.6%
\$100,000 - \$149,999	100	14.6%	200	21.4%	240	24.3%
\$150,000 - \$199,999	33	4.8%	92	9.8%	112	11.4%
\$200,000+	36	5.3%	75	8.0%	84	8.5%

Median Household Income	\$67,795	\$82,578	\$90,406
Average Household Income	\$85,062	\$104,435	\$111,547
Per Capita Income	\$28,667	\$33,003	\$35,158

Population by Age	2000		2010		2015	
	Number	Percent	Number	Percent	Number	Percent
0 - 4	163	8.1%	222	7.6%	229	7.4%
5 - 9	184	9.1%	255	8.8%	273	8.9%
10 - 14	205	10.2%	285	9.8%	316	10.3%
15 - 19	166	8.2%	239	8.2%	246	8.0%
20 - 24	69	3.4%	122	4.2%	124	4.0%
25 - 34	244	12.1%	276	9.5%	318	10.3%
35 - 44	401	19.8%	498	17.1%	493	16.0%
45 - 54	353	17.5%	531	18.2%	518	16.8%
55 - 64	145	7.2%	325	11.2%	348	11.3%
65 - 74	60	3.0%	110	3.8%	156	5.1%
75 - 84	21	1.0%	36	1.2%	45	1.5%
85+	10	0.5%	11	0.4%	13	0.4%

Race and Ethnicity	2000		2010		2015	
	Number	Percent	Number	Percent	Number	Percent
White Alone	1,732	85.7%	2,444	83.9%	2,583	83.9%
Black Alone	111	5.5%	164	5.6%	178	5.8%
American Indian Alone	12	0.6%	14	0.5%	15	0.5%
Asian Alone	68	3.4%	128	4.4%	133	4.3%
Pacific Islander Alone	1	0.0%	1	0.0%	1	0.0%
Some Other Race Alone	49	2.4%	85	2.9%	90	2.9%
Two or More Races	47	2.3%	77	2.6%	80	2.6%
Hispanic Origin (Any Race)	150	7.4%	277	9.5%	296	9.6%

Data Note: Income is expressed in current dollars

Source: U.S. Bureau of the Census, 2000 Census of Population and Housing. ESRI forecasts for 2010 and 2015.

July 28, 2010

Made with ESRI Business Analyst

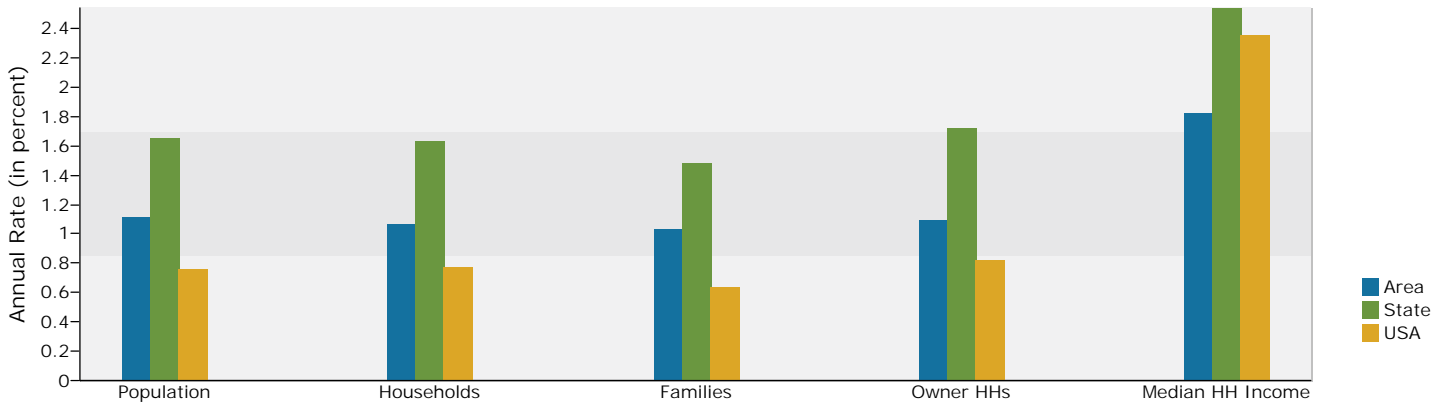


Demographic and Income Profile

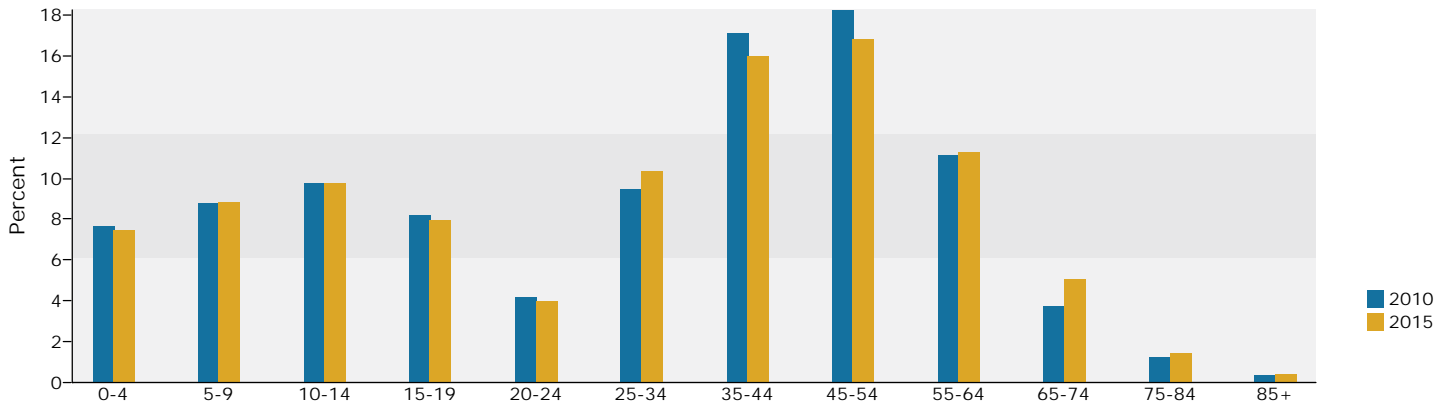
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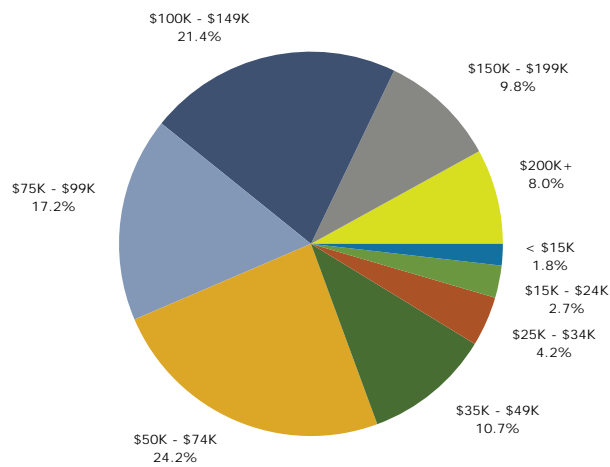
Trends 2010-2015



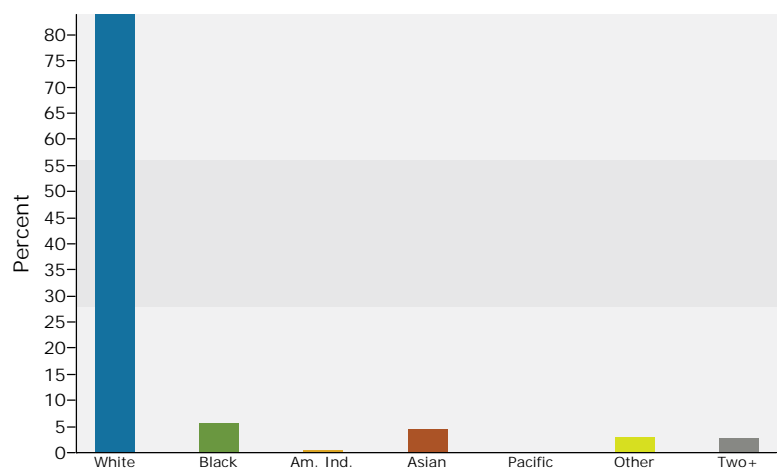
Population by Age



2010 Household Income



2010 Population by Race



2010 Percent Hispanic Origin: 9.5%

Source: U.S. Bureau of the Census, 2000 Census of Population and Housing. ESRI forecasts for 2010 and 2015.

July 28, 2010

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Demographic and Income Profile

Fm 518 at West Ranch
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 Ring: 3 miles radius

Latitude: 29.49233
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Summary	2000	2010	2015
Population	34,847	51,798	57,910
Households	12,122	18,107	20,277
Families	9,657	14,189	15,722
Average Household Size	2.86	2.85	2.84
Owner Occupied Housing Units	9,535	13,683	15,314
Renter Occupied Housing Units	2,587	4,423	4,964
Median Age	34.3	35.4	34.6
Trends: 2010 - 2015 Annual Rate	Area	State	National
Population	2.26%	1.65%	0.76%
Households	2.29%	1.63%	0.78%
Families	2.07%	1.48%	0.64%
Owner HHS	2.28%	1.72%	0.82%
Median Household Income	1.18%	2.54%	2.36%

Households by Income	2000		2010		2015	
	Number	Percent	Number	Percent	Number	Percent
< \$15,000	631	5.2%	564	3.1%	434	2.1%
\$15,000 - \$24,999	690	5.7%	545	3.0%	434	2.1%
\$25,000 - \$34,999	794	6.5%	701	3.9%	506	2.5%
\$35,000 - \$49,999	1,885	15.5%	1,399	7.7%	857	4.2%
\$50,000 - \$74,999	3,123	25.6%	4,753	26.3%	5,491	27.1%
\$75,000 - \$99,999	2,298	18.8%	4,282	23.7%	5,091	25.1%
\$100,000 - \$149,999	1,927	15.8%	3,878	21.4%	5,076	25.0%
\$150,000 - \$199,999	512	4.2%	1,281	7.1%	1,579	7.8%
\$200,000+	332	2.7%	702	3.9%	809	4.0%

Median Household Income	\$66,111	\$79,611	\$84,416
Average Household Income	\$77,146	\$92,447	\$97,616
Per Capita Income	\$26,754	\$32,049	\$33,892

Population by Age	2000		2010		2015	
	Number	Percent	Number	Percent	Number	Percent
0 - 4	2,559	7.3%	3,932	7.6%	4,395	7.6%
5 - 9	2,994	8.6%	4,048	7.8%	4,555	7.9%
10 - 14	3,345	9.6%	4,141	8.0%	4,733	8.2%
15 - 19	2,633	7.6%	3,750	7.2%	3,906	6.7%
20 - 24	1,528	4.4%	2,995	5.8%	3,158	5.5%
25 - 34	4,712	13.5%	6,706	12.9%	8,597	14.8%
35 - 44	7,012	20.1%	8,013	15.5%	8,257	14.3%
45 - 54	5,419	15.6%	8,723	16.8%	8,404	14.5%
55 - 64	2,562	7.4%	5,662	10.9%	6,793	11.7%
65 - 74	1,185	3.4%	2,398	4.6%	3,417	5.9%
75 - 84	616	1.8%	1,005	1.9%	1,231	2.1%
85+	280	0.8%	425	0.8%	464	0.8%

Race and Ethnicity	2000		2010		2015	
	Number	Percent	Number	Percent	Number	Percent
White Alone	29,700	85.2%	41,088	79.3%	44,948	77.6%
Black Alone	1,739	5.0%	3,318	6.4%	3,954	6.8%
American Indian Alone	155	0.4%	272	0.5%	320	0.6%
Asian Alone	1,359	3.9%	2,762	5.3%	3,229	5.6%
Pacific Islander Alone	13	0.0%	30	0.1%	33	0.1%
Some Other Race Alone	1,207	3.5%	2,951	5.7%	3,789	6.5%
Two or More Races	674	1.9%	1,378	2.7%	1,637	2.8%
Hispanic Origin (Any Race)	3,688	10.6%	8,496	16.4%	10,705	18.5%

Data Note: Income is expressed in current dollars

Source: U.S. Bureau of the Census, 2000 Census of Population and Housing. ESRI forecasts for 2010 and 2015.

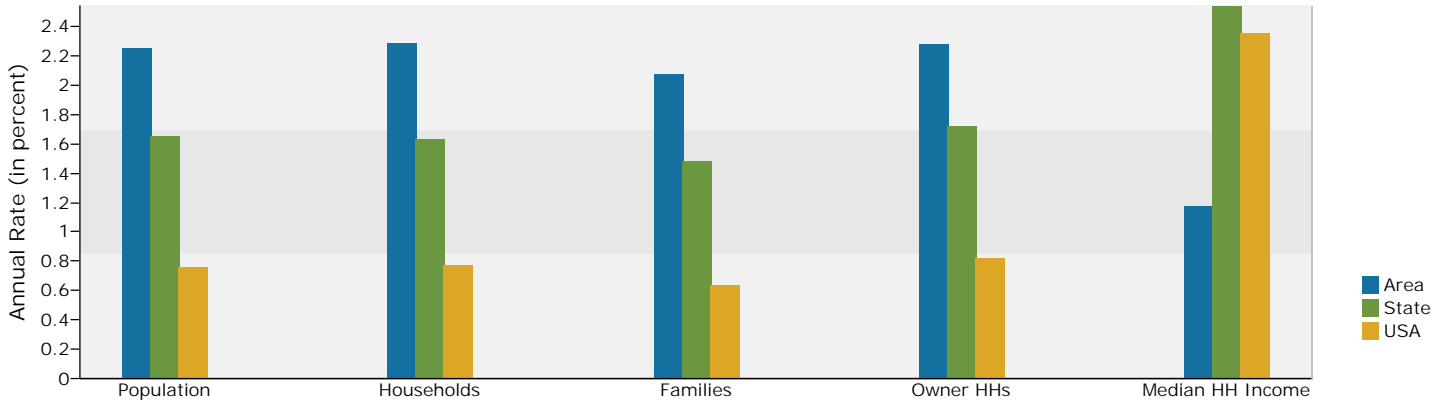
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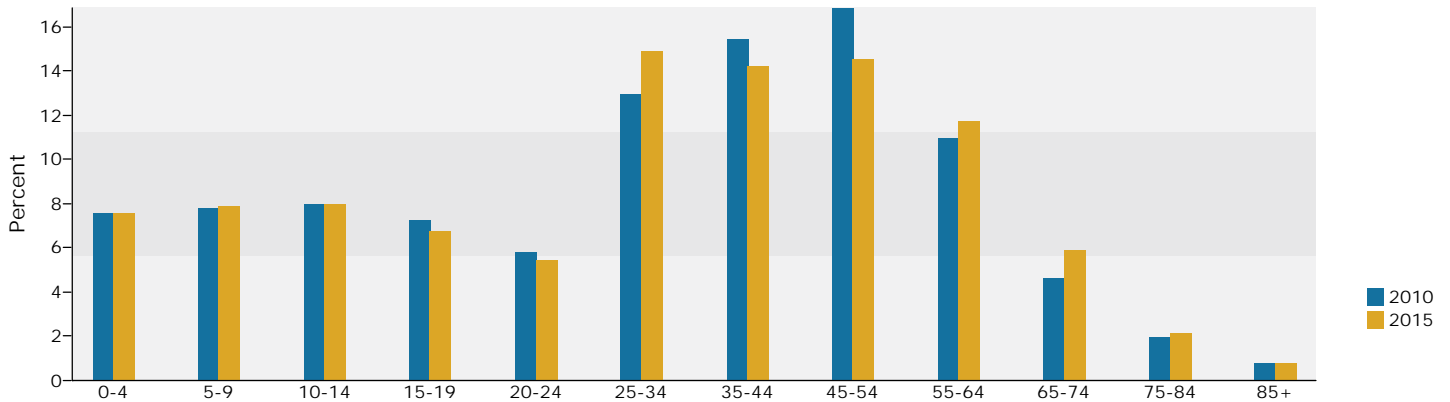
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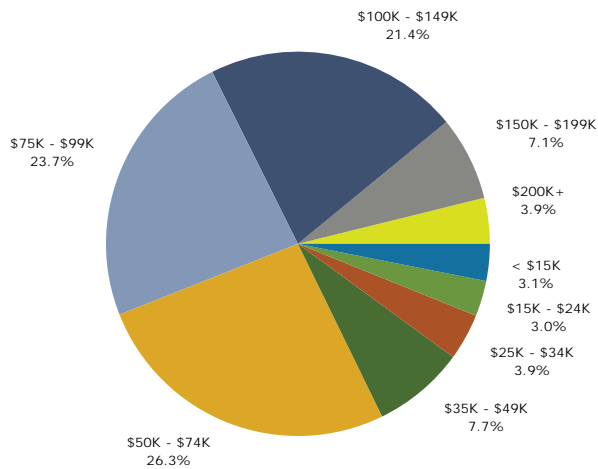
Trends 2010-2015



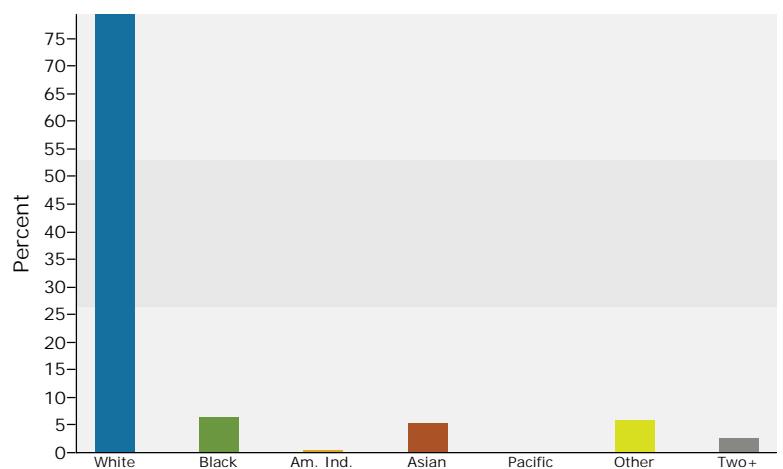
Population by Age



2010 Household Income



2010 Population by Race



2010 Percent Hispanic Origin: 16.4%

Source: U.S. Bureau of the Census, 2000 Census of Population and Housing. ESRI forecasts for 2010 and 2015.



Demographic and Income Profile

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Summary	2000	2010	2015
Population	78,218	106,545	117,861
Households	28,076	38,036	42,018
Families	20,992	27,813	30,375
Average Household Size	2.76	2.78	2.79
Owner Occupied Housing Units	19,807	26,278	29,084
Renter Occupied Housing Units	8,268	11,758	12,934
Median Age	33.3	34.4	34.1
Trends: 2010 - 2015 Annual Rate	Area	State	National
Population	2.04%	1.65%	0.76%
Households	2.01%	1.63%	0.78%
Families	1.78%	1.48%	0.64%
Owner HHs	2.05%	1.72%	0.82%
Median Household Income	1.49%	2.54%	2.36%

Households by Income	2000		2010		2015	
	Number	Percent	Number	Percent	Number	Percent
< \$15,000	1,803	6.4%	1,662	4.4%	1,352	3.2%
\$15,000 - \$24,999	2,044	7.3%	1,659	4.4%	1,389	3.3%
\$25,000 - \$34,999	2,543	9.1%	2,152	5.7%	1,618	3.9%
\$35,000 - \$49,999	4,429	15.8%	3,979	10.5%	2,562	6.1%
\$50,000 - \$74,999	7,057	25.1%	9,756	25.7%	11,389	27.1%
\$75,000 - \$99,999	4,939	17.6%	8,276	21.8%	9,931	23.6%
\$100,000 - \$149,999	3,809	13.6%	7,316	19.2%	9,771	23.3%
\$150,000 - \$199,999	874	3.1%	2,024	5.3%	2,542	6.0%
\$200,000+	596	2.1%	1,210	3.2%	1,464	3.5%

Median Household Income	\$60,938	\$74,267	\$79,961
Average Household Income	\$70,070	\$84,619	\$91,176
Per Capita Income	\$25,363	\$30,332	\$32,639

Population by Age	2000		2010		2015	
	Number	Percent	Number	Percent	Number	Percent
0 - 4	6,134	7.8%	8,419	7.9%	9,268	7.9%
5 - 9	6,470	8.3%	8,215	7.7%	9,119	7.7%
10 - 14	6,604	8.4%	8,051	7.6%	9,137	7.8%
15 - 19	5,674	7.3%	7,472	7.0%	7,840	6.7%
20 - 24	4,158	5.3%	6,461	6.1%	6,991	5.9%
25 - 34	12,294	15.7%	15,495	14.5%	18,348	15.6%
35 - 44	15,204	19.4%	16,225	15.2%	16,835	14.3%
45 - 54	11,085	14.2%	16,849	15.8%	16,303	13.8%
55 - 64	5,633	7.2%	11,117	10.4%	13,287	11.3%
65 - 74	2,829	3.6%	5,067	4.8%	7,045	6.0%
75 - 84	1,503	1.9%	2,231	2.1%	2,661	2.3%
85+	629	0.8%	943	0.9%	1,028	0.9%

Race and Ethnicity	2000		2010		2015	
	Number	Percent	Number	Percent	Number	Percent
White Alone	64,533	82.5%	81,558	76.5%	88,054	74.7%
Black Alone	4,374	5.6%	7,237	6.8%	8,469	7.2%
American Indian Alone	347	0.4%	610	0.6%	715	0.6%
Asian Alone	3,371	4.3%	5,923	5.6%	6,853	5.8%
Pacific Islander Alone	41	0.1%	90	0.1%	100	0.1%
Some Other Race Alone	3,830	4.9%	7,983	7.5%	9,953	8.4%
Two or More Races	1,724	2.2%	3,144	3.0%	3,716	3.2%
Hispanic Origin (Any Race)	10,293	13.2%	20,870	19.6%	25,873	22.0%

Data Note: Income is expressed in current dollars

Source: U.S. Bureau of the Census, 2000 Census of Population and Housing. ESRI forecasts for 2010 and 2015.

July 28, 2010

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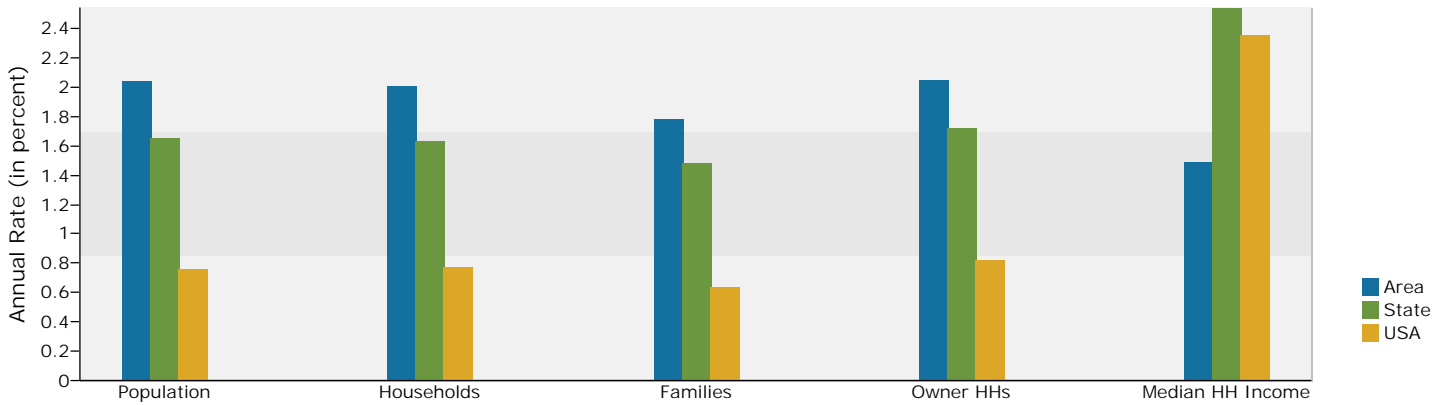


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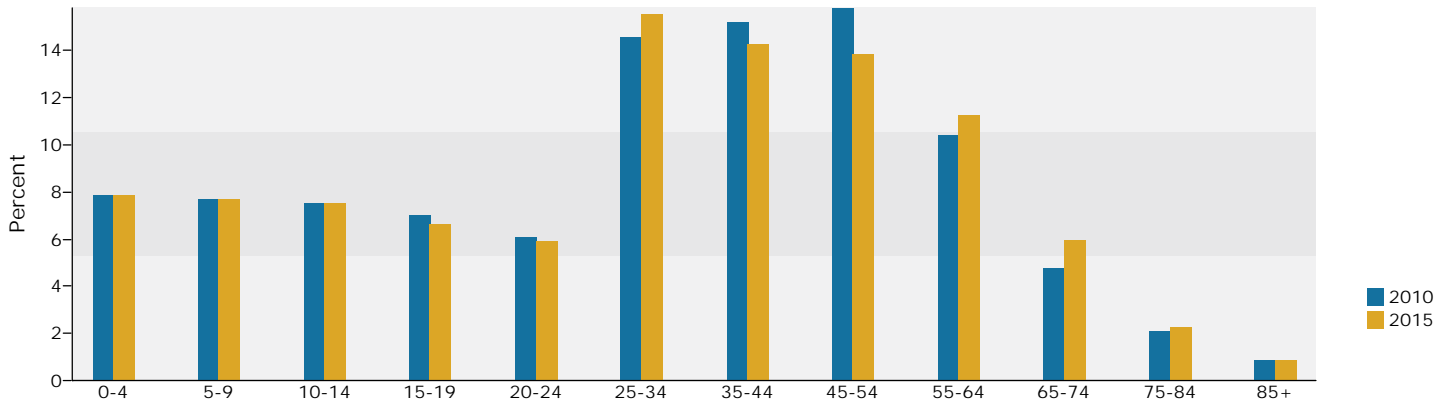
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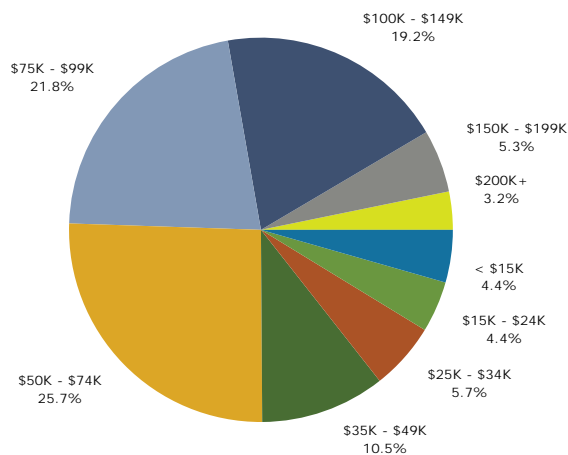
Trends 2010-2015



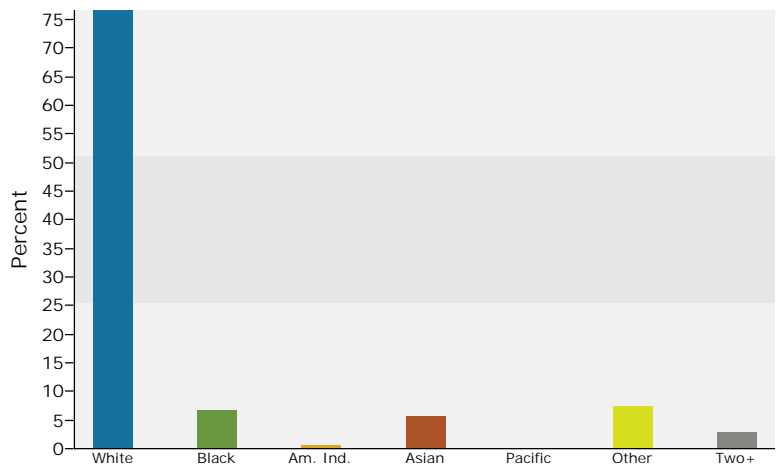
Population by Age



2010 Household Income



2010 Population by Race

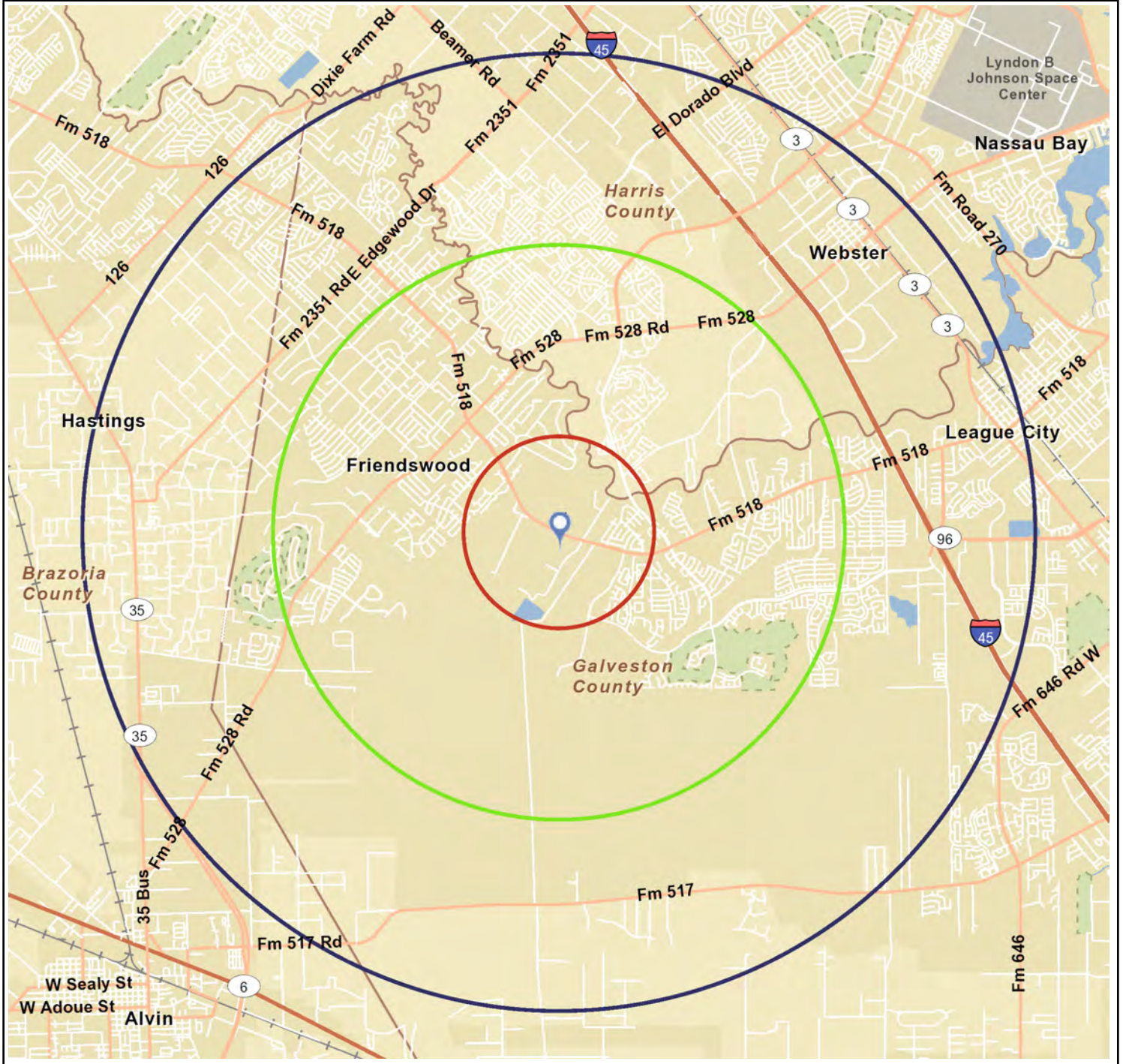


2010 Percent Hispanic Origin: 19.6%

Source: U.S. Bureau of the Census, 2000 Census of Population and Housing. ESRI forecasts for 2010 and 2015.

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Summary Demographics

2010 Population	2,913
2010 Households	936
2010 Median Disposable Income	\$65,881
2010 Per Capita Income	\$33,003

Industry Summary

	Demand (Retail Potential)	Supply (Retail Sales)	Retail Gap	Leakage/Surplus Factor	Number of Businesses
Total Retail Trade and Food & Drink (NAICS 44-45, 722)	\$39,609,620	\$4,224,895	\$35,384,725	80.7	3
Total Retail Trade (NAICS 44-45)	\$33,805,719	\$2,982,583	\$30,823,136	83.8	1
Total Food & Drink (NAICS 722)	\$5,803,901	\$1,242,312	\$4,561,589	64.7	2

Industry Group	Demand (Retail Potential)	Supply (Retail Sales)	Retail Gap	Leakage/Surplus Factor	Number of Businesses
Motor Vehicle & Parts Dealers (NAICS 441)	\$8,896,005	\$32,165	\$8,863,840	99.3	1
Automobile Dealers (NAICS 4411)	\$7,723,589	\$0	\$7,723,589	100.0	0
Other Motor Vehicle Dealers (NAICS 4412)	\$722,561	\$32,165	\$690,396	91.5	1
Auto Parts, Accessories, and Tire Stores (NAICS 4413)	\$449,855	\$0	\$449,855	100.0	0
Furniture & Home Furnishings Stores (NAICS 442)	\$1,387,790	\$0	\$1,387,790	100.0	0
Furniture Stores (NAICS 4421)	\$861,922	\$0	\$861,922	100.0	0
Home Furnishings Stores (NAICS 4422)	\$525,868	\$0	\$525,868	100.0	0
Electronics & Appliance Stores (NAICS 443/NAICS 4431)	\$805,585	\$44,398	\$761,187	89.6	1
Bldg Materials, Garden Equip. & Supply Stores (NAICS 444)	\$1,622,122	\$0	\$1,622,122	100.0	0
Building Material and Supplies Dealers (NAICS 4441)	\$1,557,353	\$0	\$1,557,353	100.0	0
Lawn and Garden Equipment and Supplies Stores (NAICS 4442)	\$64,769	\$0	\$64,769	100.0	0
Food & Beverage Stores (NAICS 445)	\$7,678,395	\$2,600,691	\$5,077,704	49.4	1
Grocery Stores (NAICS 4451)	\$7,302,752	\$2,531,308	\$4,771,444	48.5	1
Specialty Food Stores (NAICS 4452)	\$98,144	\$19,326	\$78,818	67.1	1
Beer, Wine, and Liquor Stores (NAICS 4453)	\$277,499	\$50,057	\$227,442	69.4	1
Health & Personal Care Stores (NAICS 446/NAICS 4461)	\$982,374	\$1,970	\$980,404	99.6	1
Gasoline Stations (NAICS 447/4471)	\$5,144,410	\$162,279	\$4,982,131	93.9	1
Clothing and Clothing Accessories Stores (NAICS 448)	\$1,367,054	\$58,268	\$1,308,786	91.8	1
Clothing Stores (NAICS 4481)	\$1,034,644	\$58,268	\$976,376	89.3	1
Shoe Stores (NAICS 4482)	\$108,623	\$0	\$108,623	100.0	0
Jewelry, Luggage, and Leather Goods Stores (NAICS 4483)	\$223,787	\$0	\$223,787	100.0	0
Sporting Goods, Hobby, Book, and Music Stores (NAICS 451)	\$426,484	\$5,559	\$420,925	97.4	1
Sporting Goods/Hobby/Musical Instrument Stores (NAICS 4511)	\$307,320	\$5,559	\$301,761	96.4	1
Book, Periodical, and Music Stores (NAICS 4512)	\$119,164	\$0	\$119,164	100.0	0

Data Note: Supply (retail sales) estimates sales to consumers by establishments. Sales to businesses are excluded. Demand (retail potential) estimates the expected amount spent by consumers at retail establishments. Supply and demand estimates are in current dollars. The Leakage/Surplus Factor presents a snapshot of retail opportunity. This is a measure of the relationship between supply and demand that ranges from +100 (total leakage) to -100 (total surplus). A positive value represents 'leakage' of retail opportunity outside the trade area. A negative value represents a surplus of retail sales, a market where customers are drawn in from outside the trade area. The Retail Gap represents the difference between Retail Potential and Retail Sales. 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 in the Retail Trade sector, as well as four industry groups within the Food Services & Drinking Establishments subsector.

Source: ESRI and Infogroup

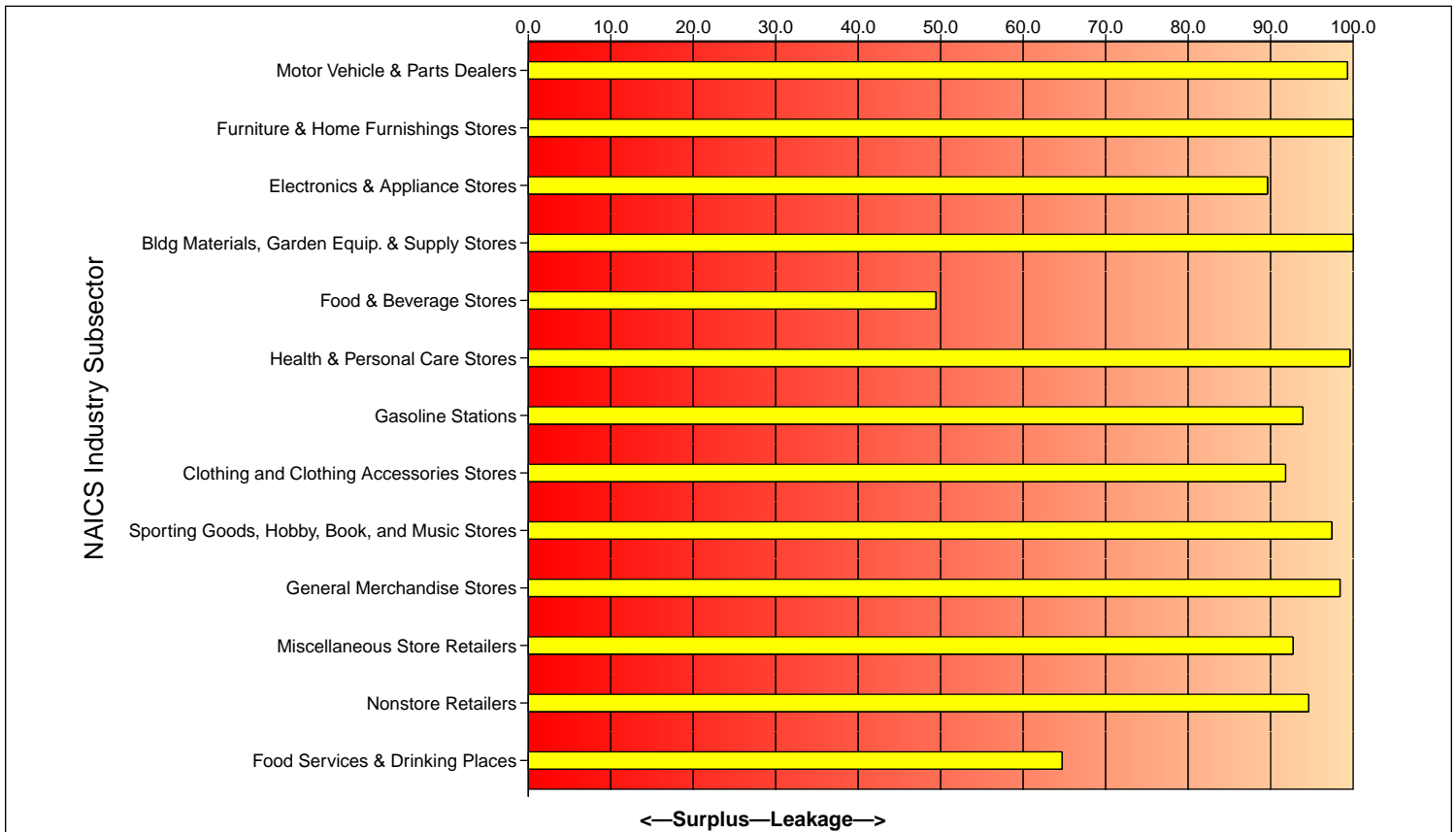


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Industry Group	Demand (Retail Potential)	Supply (Retail Sales)	Retail Gap	Leakage/Surplus Factor	Number of Businesses
General Merchandise Stores (NAICS 452)	\$4,251,347	\$34,965	\$4,216,382	98.4	1
Department Stores Excluding Leased Depts.(NAICS 4521)	\$2,277,450	\$0	\$2,277,450	100.0	0
Other General Merchandise Stores (NAICS 4529)	\$1,973,897	\$34,965	\$1,938,932	96.5	1
Miscellaneous Store Retailers (NAICS 453)	\$757,847	\$28,684	\$729,163	92.7	1
Florists (NAICS 4531)	\$76,027	\$0	\$76,027	100.0	0
Office Supplies, Stationery, and Gift Stores (NAICS 4532)	\$273,734	\$22,645	\$251,089	84.7	1
Used Merchandise Stores (NAICS 4533)	\$149,236	\$6,039	\$143,197	92.2	1
Other Miscellaneous Store Retailers (NAICS 4539)	\$258,850	\$0	\$258,850	100.0	0
Nonstore Retailers (NAICS 454)	\$486,306	\$13,604	\$472,702	94.6	1
Electronic Shopping and Mail-Order Houses (NAICS 4541)	\$326,858	\$0	\$326,858	100.0	0
Vending Machine Operators (NAICS 4542)	\$31,497	\$0	\$31,497	100.0	0
Direct Selling Establishments (NAICS 4543)	\$127,951	\$13,604	\$114,347	80.8	1
Food Services & Drinking Places (NAICS 722)	\$5,803,901	\$1,242,312	\$4,561,589	64.7	2
Full-Service Restaurants (NAICS 7221)	\$1,683,882	\$360,446	\$1,323,436	64.7	1
Limited-Service Eating Places (NAICS 7222)	\$3,408,598	\$809,485	\$2,599,113	61.6	1
Special Food Services (NAICS 7223)	\$467,917	\$18,121	\$449,796	92.5	1
Drinking Places - Alcoholic Beverages (NAICS 7224)	\$243,504	\$54,260	\$189,244	63.6	1

Leakage/Surplus Factor by Industry Subsector



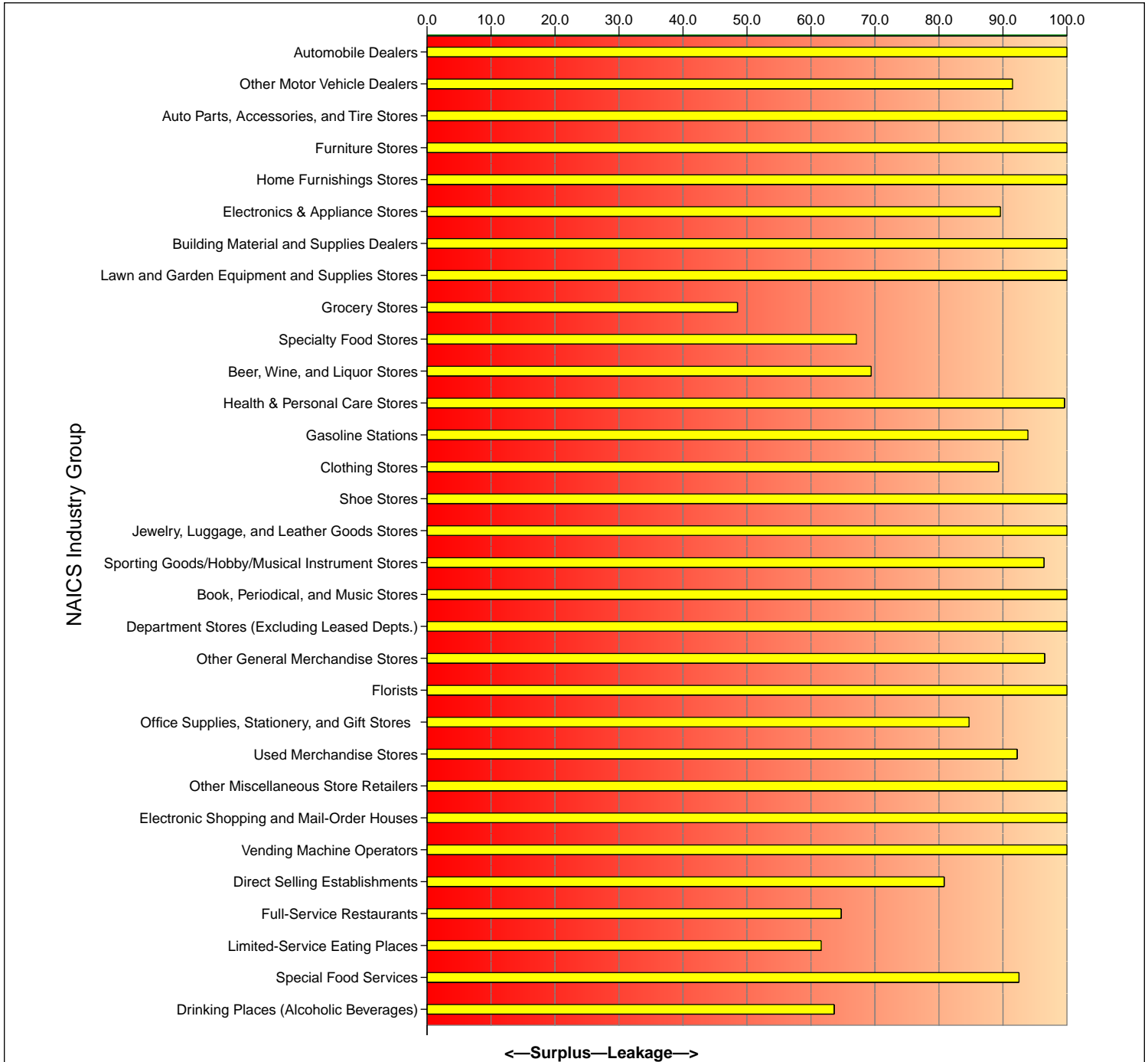
Source: ESRI and Infogroup



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Leakage/Surplus Factor by Industry Group



Source: ESRI and Infogroup



Fm 518 at West Ranch
 FM 518 & W Ranch Dr, Friendswood, TX 77546
 Ring: 3 miles radius

Latitude: 29.49233
 Longitude: -95.17257

Summary Demographics

2010 Population	51,798
2010 Households	18,107
2010 Median Disposable Income	\$62,087
2010 Per Capita Income	\$32,049

Industry Summary

Industry Summary	Demand (Retail Potential)	Supply (Retail Sales)	Retail Gap	Leakage/Surplus Factor	Number of Businesses
Total Retail Trade and Food & Drink (NAICS 44-45, 722)	\$624,693,683	\$225,875,053	\$398,818,630	46.9	230
Total Retail Trade (NAICS 44-45)	\$532,909,900	\$178,561,061	\$354,348,839	49.8	168
Total Food & Drink (NAICS 722)	\$91,783,783	\$47,313,992	\$44,469,791	32.0	62

Industry Group	Demand (Retail Potential)	Supply (Retail Sales)	Retail Gap	Leakage/Surplus Factor	Number of Businesses
Motor Vehicle & Parts Dealers (NAICS 441)	\$139,063,905	\$6,903,554	\$132,160,351	90.5	12
Automobile Dealers (NAICS 4411)	\$121,442,152	\$1,389,835	\$120,052,317	97.7	1
Other Motor Vehicle Dealers (NAICS 4412)	\$10,379,913	\$3,000,795	\$7,379,118	55.1	5
Auto Parts, Accessories, and Tire Stores (NAICS 4413)	\$7,241,840	\$2,512,924	\$4,728,916	48.5	6
Furniture & Home Furnishings Stores (NAICS 442)	\$22,063,477	\$10,862,709	\$11,200,768	34.0	13
Furniture Stores (NAICS 4421)	\$13,448,829	\$8,334,432	\$5,114,397	23.5	7
Home Furnishings Stores (NAICS 4422)	\$8,614,648	\$2,528,277	\$6,086,371	54.6	6
Electronics & Appliance Stores (NAICS 443/NAICS 4431)	\$13,959,121	\$2,086,521	\$11,872,600	74.0	14
Bldg Materials, Garden Equip. & Supply Stores (NAICS 444)	\$24,609,091	\$2,781,457	\$21,827,634	79.7	12
Building Material and Supplies Dealers (NAICS 4441)	\$23,527,492	\$1,910,419	\$21,617,073	85.0	8
Lawn and Garden Equipment and Supplies Stores (NAICS 4442)	\$1,081,599	\$871,038	\$210,561	10.8	4
Food & Beverage Stores (NAICS 445)	\$113,710,205	\$73,008,833	\$40,701,372	21.8	17
Grocery Stores (NAICS 4451)	\$107,429,557	\$67,258,010	\$40,171,547	23.0	8
Specialty Food Stores (NAICS 4452)	\$2,014,019	\$1,664,065	\$349,954	9.5	3
Beer, Wine, and Liquor Stores (NAICS 4453)	\$4,266,629	\$4,086,758	\$179,871	2.2	6
Health & Personal Care Stores (NAICS 446/NAICS 4461)	\$16,199,959	\$8,642,662	\$7,557,297	30.4	15
Gasoline Stations (NAICS 447/4471)	\$81,903,260	\$27,650,809	\$54,252,451	49.5	10
Clothing and Clothing Accessories Stores (NAICS 448)	\$23,156,112	\$8,503,226	\$14,652,886	46.3	17
Clothing Stores (NAICS 4481)	\$17,641,678	\$5,429,955	\$12,211,723	52.9	13
Shoe Stores (NAICS 4482)	\$2,111,044	\$1,345,656	\$765,388	22.1	1
Jewelry, Luggage, and Leather Goods Stores (NAICS 4483)	\$3,403,390	\$1,727,615	\$1,675,775	32.7	3
Sporting Goods, Hobby, Book, and Music Stores (NAICS 451)	\$6,894,922	\$3,166,112	\$3,728,810	37.1	14
Sporting Goods/Hobby/Musical Instrument Stores (NAICS 4511)	\$4,542,407	\$2,094,606	\$2,447,801	36.9	13
Book, Periodical, and Music Stores (NAICS 4512)	\$2,352,515	\$1,071,506	\$1,281,009	37.4	1

Data Note: Supply (retail sales) estimates sales to consumers by establishments. Sales to businesses are excluded. Demand (retail potential) estimates the expected amount spent by consumers at retail establishments. Supply and demand estimates are in current dollars. The Leakage/Surplus Factor presents a snapshot of retail opportunity. This is a measure of the relationship between supply and demand that ranges from +100 (total leakage) to -100 (total surplus). A positive value represents 'leakage' of retail opportunity outside the trade area. A negative value represents a surplus of retail sales, a market where customers are drawn in from outside the trade area. The Retail Gap represents the difference between Retail Potential and Retail Sales. 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 in the Retail Trade sector, as well as four industry groups within the Food Services & Drinking Establishments subsector.

Source: ESRI and Infogroup

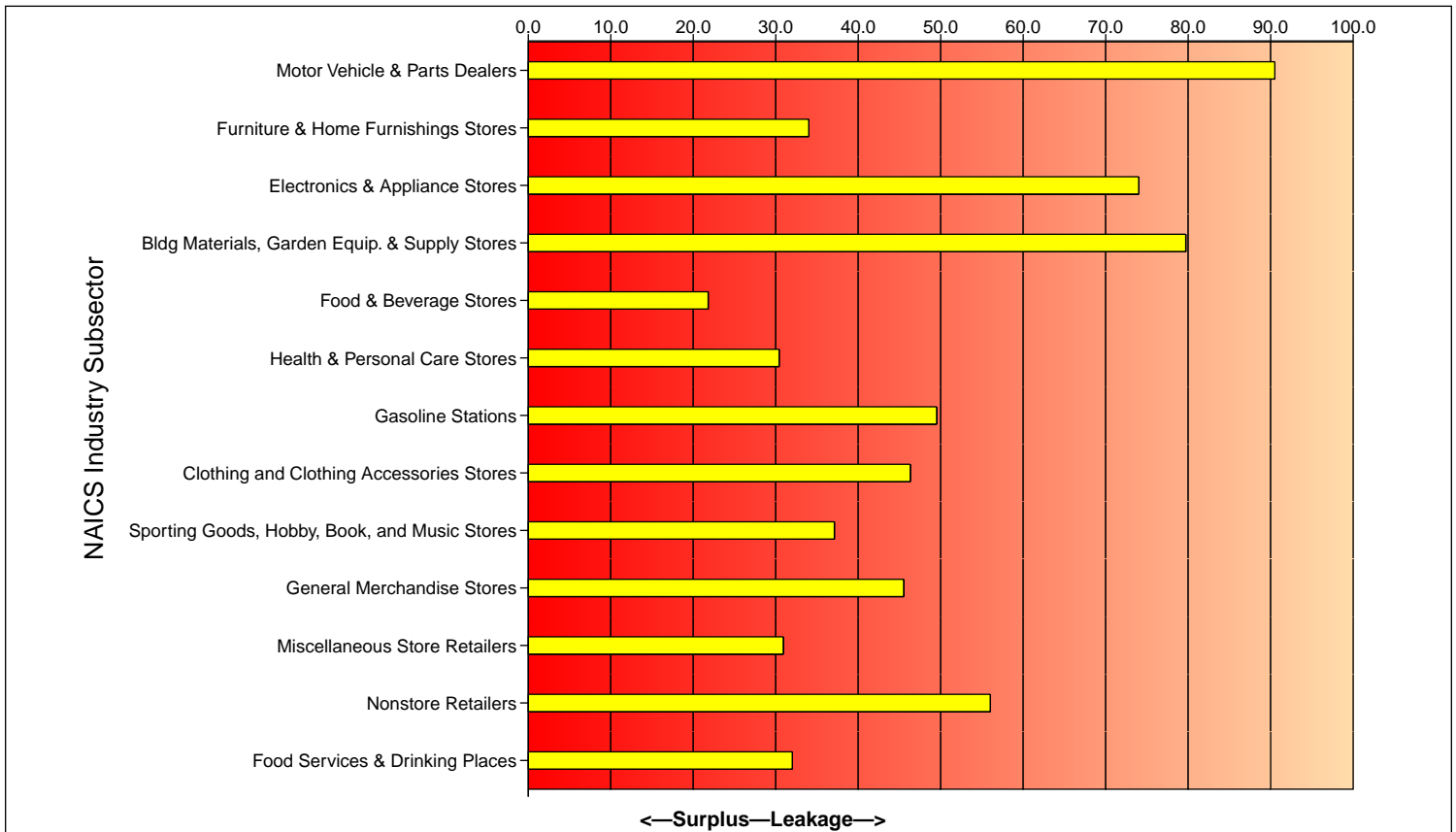


Fm 518 at West Ranch
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 Ring: 3 miles radius

Latitude: 29.49233
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Industry Group	Demand (Retail Potential)	Supply (Retail Sales)	Retail Gap	Leakage/Surplus Factor	Number of Businesses
General Merchandise Stores (NAICS 452)	\$71,035,882	\$26,597,924	\$44,437,958	45.5	8
Department Stores Excluding Leased Depts.(NAICS 4521)	\$32,461,343	\$17,746,864	\$14,714,479	29.3	5
Other General Merchandise Stores (NAICS 4529)	\$38,574,539	\$8,851,060	\$29,723,479	62.7	3
Miscellaneous Store Retailers (NAICS 453)	\$10,681,070	\$5,644,038	\$5,037,032	30.9	33
Florists (NAICS 4531)	\$1,091,405	\$422,819	\$668,586	44.2	4
Office Supplies, Stationery, and Gift Stores (NAICS 4532)	\$3,821,032	\$3,279,945	\$541,087	7.6	16
Used Merchandise Stores (NAICS 4533)	\$1,953,306	\$132,575	\$1,820,731	87.3	3
Other Miscellaneous Store Retailers (NAICS 4539)	\$3,815,327	\$1,808,699	\$2,006,628	35.7	10
Nonstore Retailers (NAICS 454)	\$9,632,896	\$2,713,216	\$6,919,680	56.0	3
Electronic Shopping and Mail-Order Houses (NAICS 4541)	\$6,064,487	\$1,640,861	\$4,423,626	57.4	1
Vending Machine Operators (NAICS 4542)	\$863,910	\$0	\$863,910	100.0	0
Direct Selling Establishments (NAICS 4543)	\$2,704,499	\$1,072,355	\$1,632,144	43.2	3
Food Services & Drinking Places (NAICS 722)	\$91,783,783	\$47,313,992	\$44,469,791	32.0	62
Full-Service Restaurants (NAICS 7221)	\$26,733,029	\$15,843,431	\$10,889,598	25.6	28
Limited-Service Eating Places (NAICS 7222)	\$53,084,903	\$28,846,585	\$24,238,318	29.6	28
Special Food Services (NAICS 7223)	\$8,104,646	\$543,568	\$7,561,078	87.4	2
Drinking Places - Alcoholic Beverages (NAICS 7224)	\$3,861,205	\$2,080,408	\$1,780,797	30.0	4

Leakage/Surplus Factor by Industry Subsector

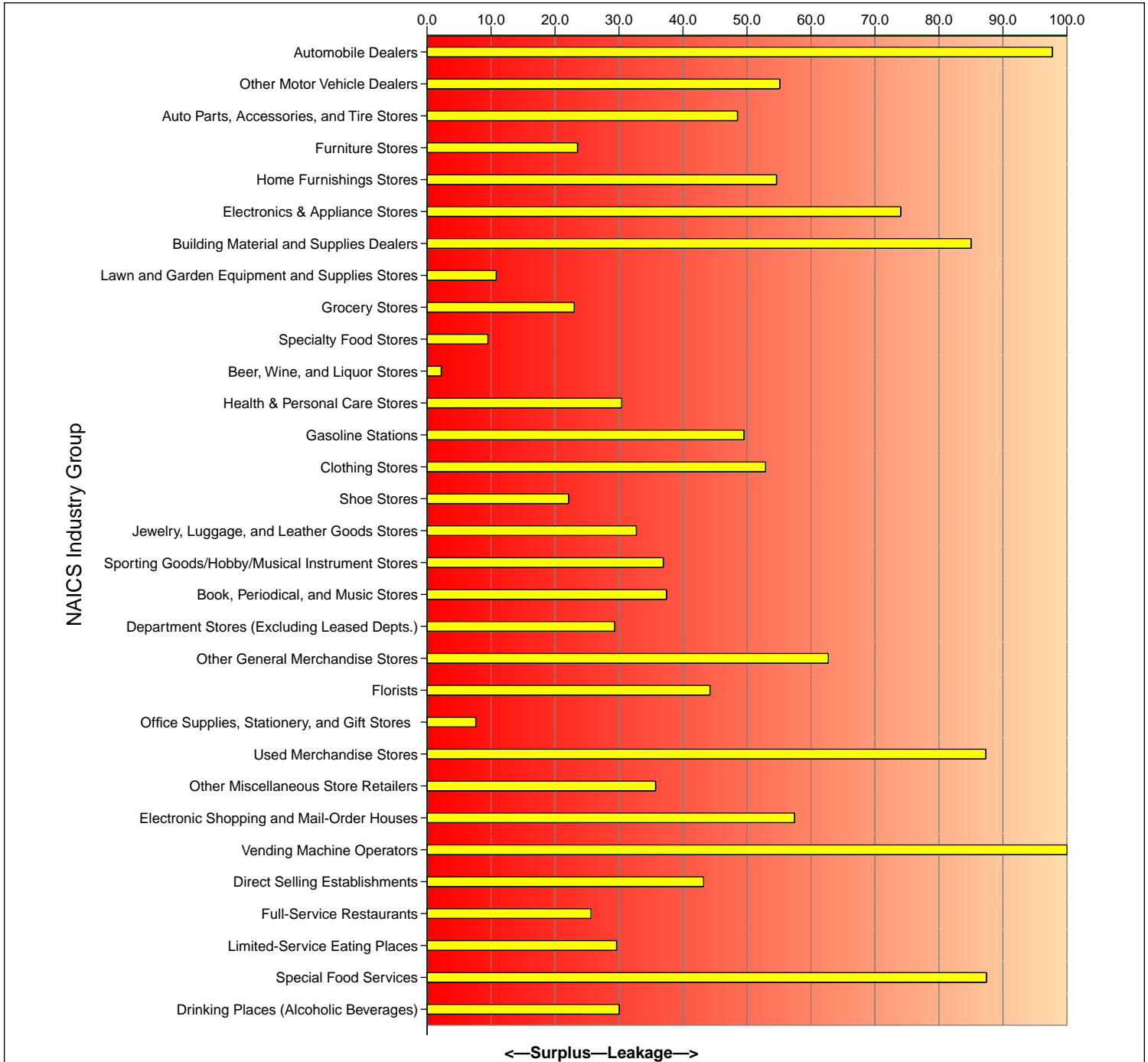


Source: ESRI and Infogroup

Fm 518 at West Ranch
 FM 518 & W Ranch Dr, Friendswood, TX 77546
 Ring: 3 miles radius

Latitude: 29.49233
 Longitude: -95.17257

Leakage/Surplus Factor by Industry Group



Source: ESRI and Infogroup



Fm 518 at West Ranch
 FM 518 & W Ranch Dr, Friendswood, TX 77546
 Ring: 5 miles radius

Latitude: 29.49233
 Longitude: -95.17257

Summary Demographics

2010 Population	106,545
2010 Households	38,036
2010 Median Disposable Income	\$57,616
2010 Per Capita Income	\$30,332

Industry Summary

	Demand (Retail Potential)	Supply (Retail Sales)	Retail Gap	Leakage/Surplus Factor	Number of Businesses
Total Retail Trade and Food & Drink (NAICS 44-45, 722)	\$1,232,444,749	\$1,521,446,577	\$-289,001,828	-10.5	943
Total Retail Trade (NAICS 44-45)	\$1,051,877,326	\$1,263,080,944	\$-211,203,618	-9.1	685
Total Food & Drink (NAICS 722)	\$180,567,423	\$258,365,633	\$-77,798,210	-17.7	258

Industry Group	Demand (Retail Potential)	Supply (Retail Sales)	Retail Gap	Leakage/Surplus Factor	Number of Businesses
Motor Vehicle & Parts Dealers (NAICS 441)	\$273,394,963	\$416,572,012	\$-143,177,049	-20.8	56
Automobile Dealers (NAICS 4411)	\$239,528,844	\$395,728,093	\$-156,199,249	-24.6	24
Other Motor Vehicle Dealers (NAICS 4412)	\$19,343,429	\$6,982,619	\$12,360,810	47.0	10
Auto Parts, Accessories, and Tire Stores (NAICS 4413)	\$14,522,690	\$13,861,300	\$661,390	2.3	22
Furniture & Home Furnishings Stores (NAICS 442)	\$43,100,855	\$48,429,090	\$-5,328,235	-5.8	53
Furniture Stores (NAICS 4421)	\$26,458,552	\$33,057,466	\$-6,598,914	-11.1	27
Home Furnishings Stores (NAICS 4422)	\$16,642,303	\$15,371,624	\$1,270,679	4.0	26
Electronics & Appliance Stores (NAICS 443/NAICS 4431)	\$28,150,882	\$45,407,831	\$-17,256,949	-23.5	48
Bldg Materials, Garden Equip. & Supply Stores (NAICS 444)	\$47,194,117	\$39,501,164	\$7,692,953	8.9	37
Building Material and Supplies Dealers (NAICS 4441)	\$45,011,054	\$37,717,899	\$7,293,155	8.8	27
Lawn and Garden Equipment and Supplies Stores (NAICS 4442)	\$2,183,063	\$1,783,265	\$399,798	10.1	10
Food & Beverage Stores (NAICS 445)	\$219,911,909	\$196,569,502	\$23,342,407	5.6	50
Grocery Stores (NAICS 4451)	\$207,569,668	\$182,034,504	\$25,535,164	6.6	25
Specialty Food Stores (NAICS 4452)	\$4,359,663	\$5,236,771	\$-877,108	-9.1	12
Beer, Wine, and Liquor Stores (NAICS 4453)	\$7,982,578	\$9,298,227	\$-1,315,649	-7.6	13
Health & Personal Care Stores (NAICS 446/NAICS 4461)	\$32,551,703	\$40,229,929	\$-7,678,226	-10.5	66
Gasoline Stations (NAICS 447/4471)	\$164,266,639	\$111,823,626	\$52,443,013	19.0	37
Clothing and Clothing Accessories Stores (NAICS 448)	\$46,002,892	\$125,986,234	\$-79,983,342	-46.5	135
Clothing Stores (NAICS 4481)	\$35,004,935	\$104,448,489	\$-69,443,554	-49.8	90
Shoe Stores (NAICS 4482)	\$4,396,275	\$10,261,433	\$-5,865,158	-40.0	20
Jewelry, Luggage, and Leather Goods Stores (NAICS 4483)	\$6,601,682	\$11,276,312	\$-4,674,630	-26.1	25
Sporting Goods, Hobby, Book, and Music Stores (NAICS 451)	\$13,890,420	\$29,362,443	\$-15,472,023	-35.8	60
Sporting Goods/Hobby/Musical Instrument Stores (NAICS 4511)	\$8,919,730	\$18,649,749	\$-9,730,019	-35.3	52
Book, Periodical, and Music Stores (NAICS 4512)	\$4,970,690	\$10,712,694	\$-5,742,004	-36.6	8

Data Note: Supply (retail sales) estimates sales to consumers by establishments. Sales to businesses are excluded. Demand (retail potential) estimates the expected amount spent by consumers at retail establishments. Supply and demand estimates are in current dollars. The Leakage/Surplus Factor presents a snapshot of retail opportunity. This is a measure of the relationship between supply and demand that ranges from +100 (total leakage) to -100 (total surplus). A positive value represents 'leakage' of retail opportunity outside the trade area. A negative value represents a surplus of retail sales, a market where customers are drawn in from outside the trade area. The Retail Gap represents the difference between Retail Potential and Retail Sales. 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 in the Retail Trade sector, as well as four industry groups within the Food Services & Drinking Establishments subsector.

Source: ESRI and Infogroup

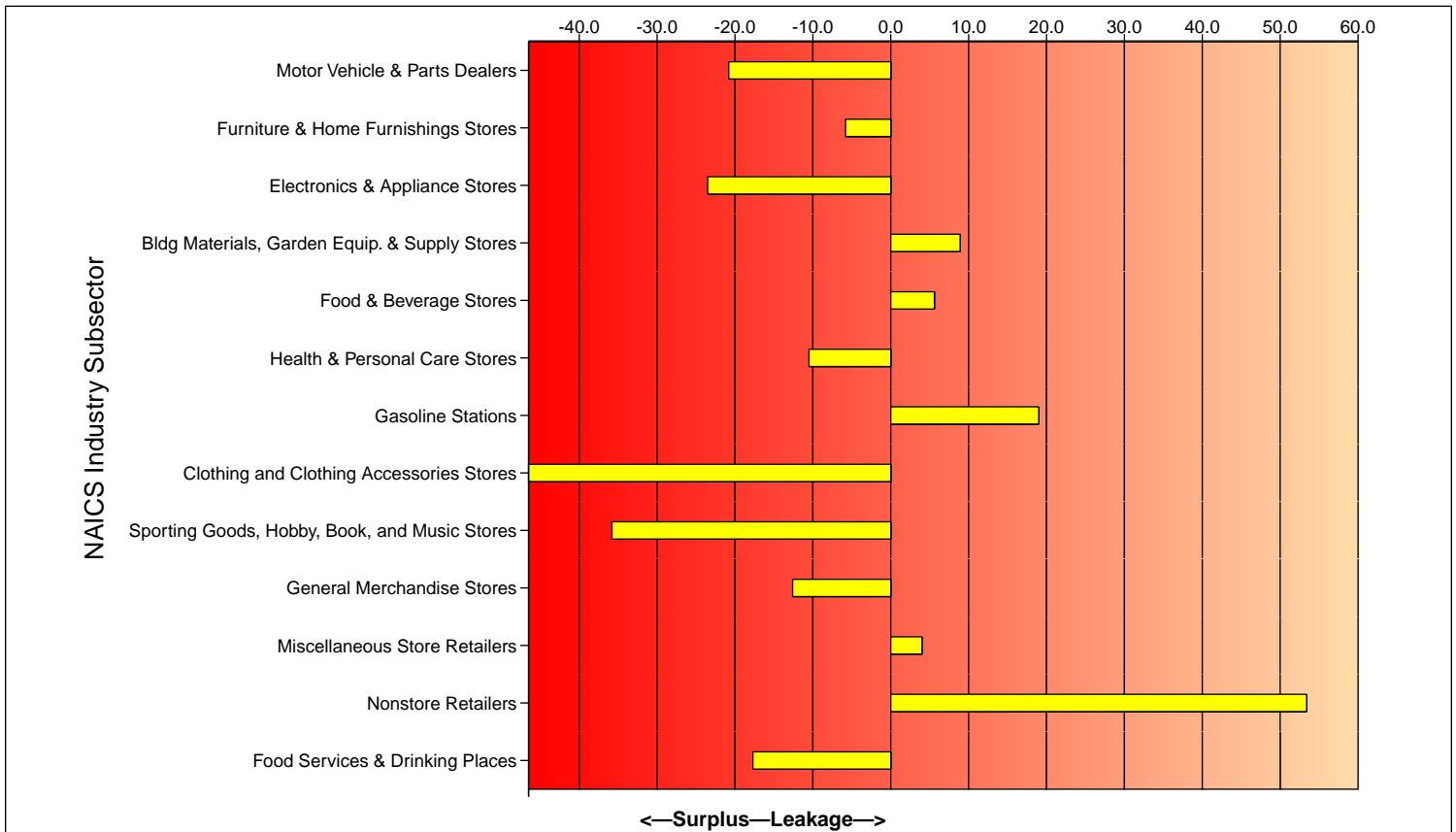


Fm 518 at West Ranch
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Industry Group	Demand (Retail Potential)	Supply (Retail Sales)	Retail Gap	Leakage/Surplus Factor	Number of Businesses
General Merchandise Stores (NAICS 452)	\$143,397,591	\$184,609,304	-\$41,211,713	-12.6	28
Department Stores Excluding Leased Depts.(NAICS 4521)	\$63,484,736	\$140,934,540	-\$77,449,804	-37.9	21
Other General Merchandise Stores (NAICS 4529)	\$79,912,855	\$43,674,764	\$36,238,091	29.3	7
Miscellaneous Store Retailers (NAICS 453)	\$20,080,864	\$18,539,019	\$1,541,845	4.0	108
Florists (NAICS 4531)	\$2,078,437	\$1,414,632	\$663,805	19.0	13
Office Supplies, Stationery, and Gift Stores (NAICS 4532)	\$7,082,872	\$9,141,440	-\$2,058,568	-12.7	44
Used Merchandise Stores (NAICS 4533)	\$3,553,207	\$1,366,822	\$2,186,385	44.4	18
Other Miscellaneous Store Retailers (NAICS 4539)	\$7,366,348	\$6,616,125	\$750,223	5.4	33
Nonstore Retailers (NAICS 454)	\$19,934,491	\$6,050,790	\$13,883,701	53.4	7
Electronic Shopping and Mail-Order Houses (NAICS 4541)	\$12,102,566	\$4,089,780	\$8,012,786	49.5	1
Vending Machine Operators (NAICS 4542)	\$1,977,422	\$112,291	\$1,865,131	89.3	1
Direct Selling Establishments (NAICS 4543)	\$5,854,503	\$1,848,719	\$4,005,784	52.0	5
Food Services & Drinking Places (NAICS 722)	\$180,567,423	\$258,365,633	-\$77,798,210	-17.7	258
Full-Service Restaurants (NAICS 7221)	\$50,724,793	\$116,292,538	-\$65,567,745	-39.3	121
Limited-Service Eating Places (NAICS 7222)	\$106,080,253	\$124,993,042	-\$18,912,789	-8.2	114
Special Food Services (NAICS 7223)	\$15,938,437	\$2,512,922	\$13,425,515	72.8	4
Drinking Places - Alcoholic Beverages (NAICS 7224)	\$7,823,940	\$14,567,131	-\$6,743,191	-30.1	19

Leakage/Surplus Factor by Industry Subsector

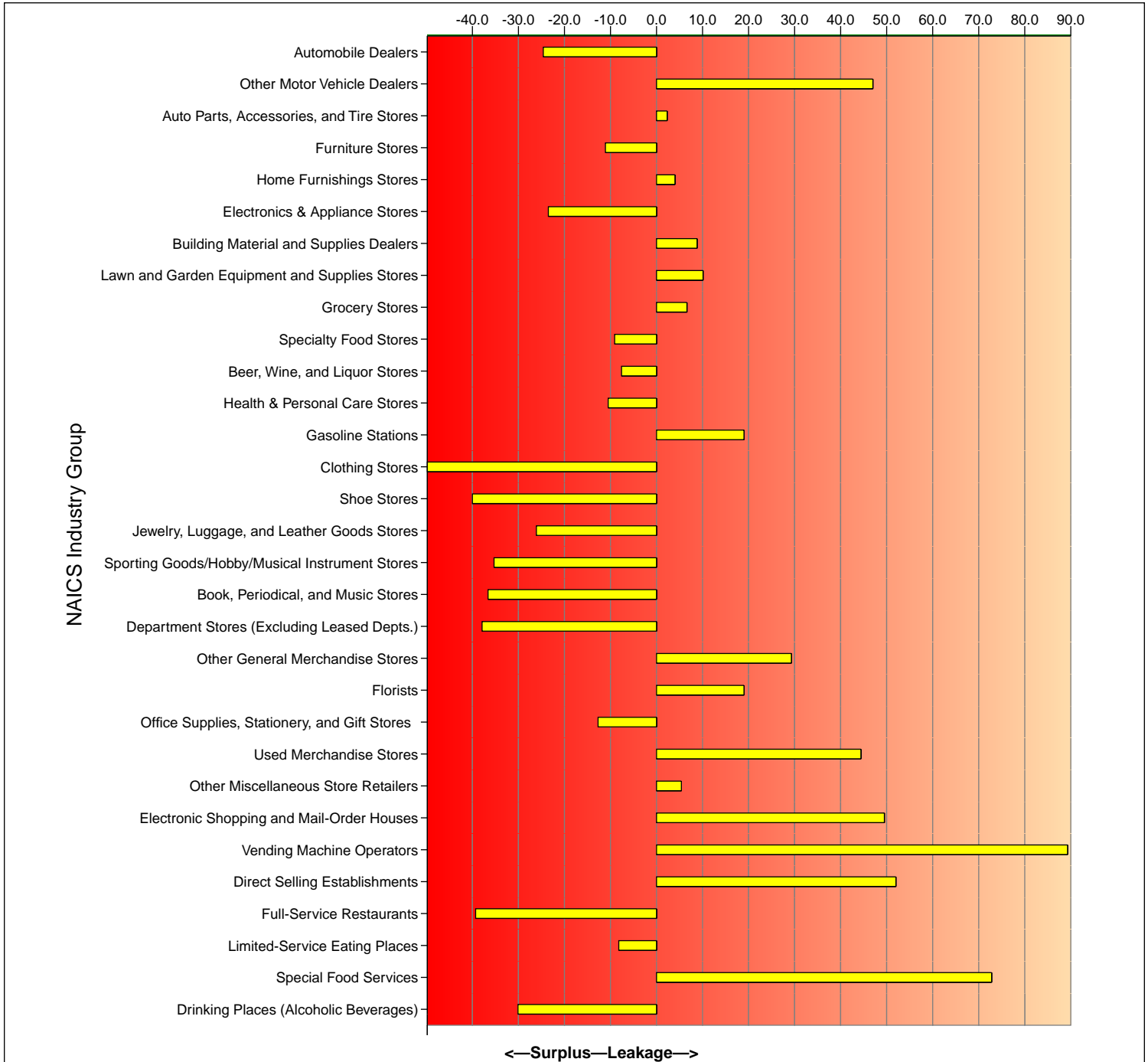


Source: ESRI and Infogroup

Fm 518 at West Ranch
 FM 518 & W Ranch Dr, Friendswood, TX 77546
 Ring: 5 miles radius

Latitude: 29.49233
 Longitude: -95.17257

Leakage/Surplus Factor by Industry Group



Source: ESRI and Infogroup



Fm 518 at West Ranch
 FM 518 & W Ranch Dr, Friendswood, TX 77546
 Ring: 1 mile radius

Latitude: 29.49233
 Longitude: -95.17257

	Census 2000	2010	2015	2010-2015 Change	2010-2015 Annual Rate
Population	2,020	2,913	3,080	167	1.12%
Median Age	34.3	36.2	35.7	-0.5	-0.28%
Households	660	936	987	51	1.07%
Average Household Size	3.06	3.11	3.12	0.01	0.06%

2010 Households by Net Worth

	Number	Percent
Total	935	100.0%
<\$15,000	37	4.0%
\$15,000 - \$34,999	28	3.0%
\$35,000 - \$49,999	29	3.1%
\$50,000 - \$74,999	41	4.4%
\$75,000 - \$99,999	37	4.0%
\$100,000 - \$149,999	71	7.6%
\$150,000 - \$249,999	123	13.2%
\$250,000 - \$499,999	189	20.2%
\$500,000 - \$999,999	178	19.0%
\$1,000,000+	202	21.6%
Median Net Worth	\$350,306	
Average Net Worth	\$993,781	

2010 Net Worth by Age of Householder

	Number of Households						
	<25	25-34	35-44	45-54	55-64	65-74	75+
Total	18	116	251	288	182	59	22
<\$15,000	5	13	8	6	3	2	2
\$15,000 - \$34,999	2	7	8	3	7	0	1
\$35,000 - \$49,999	5	4	9	5	5	0	1
\$50,000 - \$99,999	4	23	19	12	12	4	4
\$100,000 - \$149,999	0	14	22	15	15	3	1
\$150,000 - \$249,999	0	11	47	40	20	4	1
\$250,000 - \$499,999	2	20	73	50	26	12	6
\$500,000+	0	24	65	157	94	34	6
Median Net Worth	\$39,387	\$136,412	\$272,838	\$500,000	\$500,000	\$500,000	\$272,727
Average Net Worth	\$75,000	\$383,966	\$525,712	\$1,063,311	\$1,204,364	\$1,395,968	\$601,873

Data Note: Net Worth is total household wealth minus debt, secured and unsecured. Net worth includes home equity, equity in pension plans, net equity in vehicles, IRAs and Keogh accounts, business equity, interest-earning assets and mutual fund shares, stocks, etc. Examples of secured debt include home mortgages and vehicle loans; examples of unsecured debt include credit card debt, certain bank loans, and other outstanding bills. Forecasts of net worth are based on the Survey of Consumer Finances, Federal Reserve Board. Detail may not sum to totals due to rounding.

Source: U.S. Bureau of the Census, 2000 Census of Population and Housing. ESRI forecasts for 2010 and 2015.



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	Census 2000	2010	2015	2010-2015 Change	2010-2015 Annual Rate
Population	34,847	51,798	57,910	6,112	2.26%
Median Age	34.3	35.4	34.6	-0.8	-0.46%
Households	12,122	18,107	20,277	2,170	2.29%
Average Household Size	2.86	2.85	2.84	-0.01	-0.07%

2010 Households by Net Worth

	Number	Percent
Total	18,106	100.0%
<\$15,000	2,008	11.1%
\$15,000 - \$34,999	965	5.3%
\$35,000 - \$49,999	586	3.2%
\$50,000 - \$74,999	906	5.0%
\$75,000 - \$99,999	932	5.1%
\$100,000 - \$149,999	1,452	8.0%
\$150,000 - \$249,999	2,274	12.6%
\$250,000 - \$499,999	3,644	20.1%
\$500,000 - \$999,999	2,966	16.4%
\$1,000,000+	2,373	13.1%
Median Net Worth	\$245,645	
Average Net Worth	\$688,001	

2010 Net Worth by Age of Householder

	Number of Households						
	<25	25-34	35-44	45-54	55-64	65-74	75+
Total	591	3,073	4,178	4,920	3,281	1,389	678
<\$15,000	400	574	419	281	170	79	86
\$15,000 - \$34,999	44	447	236	87	76	49	25
\$35,000 - \$49,999	28	129	221	108	55	27	18
\$50,000 - \$99,999	46	437	442	470	190	179	74
\$100,000 - \$149,999	28	432	320	305	180	108	79
\$150,000 - \$249,999	6	550	730	559	244	88	97
\$250,000 - \$499,999	29	375	1,112	1,230	520	274	106
\$500,000+	10	129	698	1,880	1,846	585	193
Median Net Worth	\$11,081	\$91,406	\$201,409	\$345,271	\$500,000	\$366,875	\$198,977
Average Net Worth	\$49,734	\$170,703	\$388,924	\$805,847	\$1,297,802	\$1,054,204	\$600,888

Data Note: Net Worth is total household wealth minus debt, secured and unsecured. Net worth includes home equity, equity in pension plans, net equity in vehicles, IRAs and Keogh accounts, business equity, interest-earning assets and mutual fund shares, stocks, etc. Examples of secured debt include home mortgages and vehicle loans; examples of unsecured debt include credit card debt, certain bank loans, and other outstanding bills. Forecasts of net worth are based on the Survey of Consumer Finances, Federal Reserve Board. Detail may not sum to totals due to rounding.

Source: U.S. Bureau of the Census, 2000 Census of Population and Housing. ESRI forecasts for 2010 and 2015.



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	Census 2000	2010	2015	2010-2015 Change	2010-2015 Annual Rate
Population	78,218	106,545	117,861	11,316	2.04%
Median Age	33.3	34.4	34.1	-0.3	-0.18%
Households	28,076	38,036	42,018	3,982	2.01%
Average Household Size	2.76	2.78	2.79	0.01	0.07%

2010 Households by Net Worth

	Number	Percent
Total	38,037	100.0%
<\$15,000	6,270	16.5%
\$15,000 - \$34,999	2,552	6.7%
\$35,000 - \$49,999	1,470	3.9%
\$50,000 - \$74,999	2,109	5.5%
\$75,000 - \$99,999	1,962	5.2%
\$100,000 - \$149,999	3,055	8.0%
\$150,000 - \$249,999	4,496	11.8%
\$250,000 - \$499,999	6,838	18.0%
\$500,000 - \$999,999	5,500	14.5%
\$1,000,000+	3,785	10.0%
Median Net Worth	\$177,406	
Average Net Worth	\$558,693	

2010 Net Worth by Age of Householder

	Number of Households						
	<25	25-34	35-44	45-54	55-64	65-74	75+
Total	1,705	7,306	8,651	9,536	6,298	2,972	1,571
<\$15,000	1,339	2,223	1,210	697	369	211	221
\$15,000 - \$34,999	104	1,154	618	317	183	108	68
\$35,000 - \$49,999	58	342	485	313	161	57	55
\$50,000 - \$99,999	81	954	1,040	1,022	432	375	168
\$100,000 - \$149,999	47	803	667	742	403	226	168
\$150,000 - \$249,999	18	959	1,326	1,175	550	241	228
\$250,000 - \$499,999	43	634	2,100	2,188	1,055	585	232
\$500,000+	15	237	1,205	3,082	3,145	1,169	431
Median Net Worth	\$9,550	\$46,554	\$166,331	\$284,520	\$498,479	\$331,861	\$186,502
Average Net Worth	\$31,906	\$132,342	\$339,194	\$700,165	\$1,170,159	\$994,787	\$579,636

Data Note: Net Worth is total household wealth minus debt, secured and unsecured. Net worth includes home equity, equity in pension plans, net equity in vehicles, IRAs and Keogh accounts, business equity, interest-earning assets and mutual fund shares, stocks, etc. Examples of secured debt include home mortgages and vehicle loans; examples of unsecured debt include credit card debt, certain bank loans, and other outstanding bills. Forecasts of net worth are based on the Survey of Consumer Finances, Federal Reserve Board. Detail may not sum to totals due to rounding.

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