

THE ROAN REPORT[®]

**SH 528 at SH 518
Friendswood, Texas
Three, Five, and Seven Mile Radius
"A Diagnostic Analysis of Retail Potential"**

July 2008

**Prepared for:
Ms. Karen Capps
City of Friendswood
910 South Friendswood Drive
Friendswood, TX 77546**



**INSIGHT RESEARCH
CORPORATION**

**9441 LBJ Freeway, Lock Box 20
Dallas, TX 75243
(972) 238-8838 FAX (214) 495-7743**

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 - A. Guide to Interpreting the Statistical Supply and Demand Findings
 - B. Retail Categories within Standard Industrial Classifications

July 10, 2008

Ms. Karen Capps
City of Friendswood
910 South Friendswood Drive
Friendswood, TX 77546

**SUBJECT: ROAN Report® of Retail Opportunity – SH 528 at SH 518
Three, Five, and Seven Mile Radius**

Dear Ms. Capps:

Insight Research Corporation has completed an analysis of retail opportunity, the ROAN Report®, examining the opportunities for additional retail trade and the associated tax revenues which may be generated in various retail categories. This letter transmits findings of that analysis.

The ROAN Report® is a retail diagnostic report which measures the balance between retail supply and retail demand in your designated geographic trade area. The analysis determines existing consumer demand, (expendable income) then subtracts existing market supply (gross sales) by retail category. The difference is unmet retail opportunity, reported by category of retail sales potential.

I trust this analysis provides background that will be of use to you and your associates. If we may be of further assistance, please contact me, or our Director of Statistical Analysis, Mollie Tully, at (972) 238-8838.

Sincerely,

M. Elizabeth Morris
CEO / Chief Economist

SH 528 at SH 518 3, 5, and 7 Mile Radius



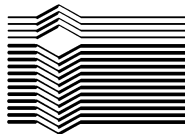
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**3 Mile Radius
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KEY FINDINGS

1. New Retail Opportunity: Findings suggest that the following business categories offer the greatest retail opportunities for consumers and taxing jurisdictions at this time:

- Liquor Stores, Beer & Wine Sales
- Hardware, Garden
- Misc Apparel & Accessories
- Appliances & Electronics
- Automotive Services, Repair, Parking & Rental
- Drugs & Sundries
- Men's & Boy's Clothing
- Restaurants
- Women's & Girls Clothing & Accessories
- Personal Services
- Misc Entertainment
- Furniture & Home Furnishings
- Misc Retail
- Children's & Infant's Wear
- Grocery

2. Annual Sales Tax Revenue Potential: New sales tax revenues which could be generated each year with the capture of these retail opportunities are as follows:

Jurisdiction	Potential New Sales Tax Revenue
State	\$32,167,767
City	\$7,720,264
Total	\$39,888,031

**Assumes the businesses are located within incorporated cities. Special tax rates may apply to certain goods for example jewelry and tobacco.*

3. Retail Needs Met: Basic retail demand has not been met in the trade area for any of the retail categories.

4. Population and Income Trends in the Study Area: Annual population and income trends are as follows:

	Studied Area	United States
• Average Household Income	\$88,155	\$66,670
• % Households with Incomes \$35K+	84.5%	64.9%
• Population Change 2000 to 2007	22.1%	7.0%

5. Retail Opportunities - Unmet Retail Demand: Retail opportunities, or unmet retail demand, and its supportable square footage is currently demonstrated in the following categories:

Category	% Unmet Capacity	Available Dollars	Supportable Square Feet
Liquor Stores, Beer & Wine Sales	89%	\$19,344,852	70,574
Hardware, Garden	85%	\$48,945,964	151,523
Misc Apparel & Accessories	85%	\$39,582,603	245,344
Appliances & Electronics	79%	\$71,703,740	330,494
Automotive Services, Repair, Parking & Rental	76%	\$37,743,188	90,195
Drugs & Sundries	72%	\$38,197,547	119,614
Men's & Boy's Clothing	70%	\$20,961,428	120,832
Restaurants	69%	\$98,171,434	410,802
Women's & Girls Clothing & Accessories	68%	\$29,585,518	197,070
Personal Services	67%	\$35,642,053	282,041
Misc Entertainment	61%	\$56,618,027	614,081
Furniture & Home Furnishings	58%	\$21,966,901	131,926
Misc Retail	54%	\$22,409,629	136,113
Children's & Infant's Wear	43%	\$1,181,634	5,879
Grocery	6%	\$7,620,708	24,055
Retail Totals		\$549,675,226	2,930,545

6. Estimate of Annual Retail Jobs Associated with this Square Footage: 5,861

Note: In trade areas with five or fewer retail outlets in a single category, supply data from the tax records may have been suppressed.

RETAIL OPPORTUNITY ANALYSIS

3 Mile Radius

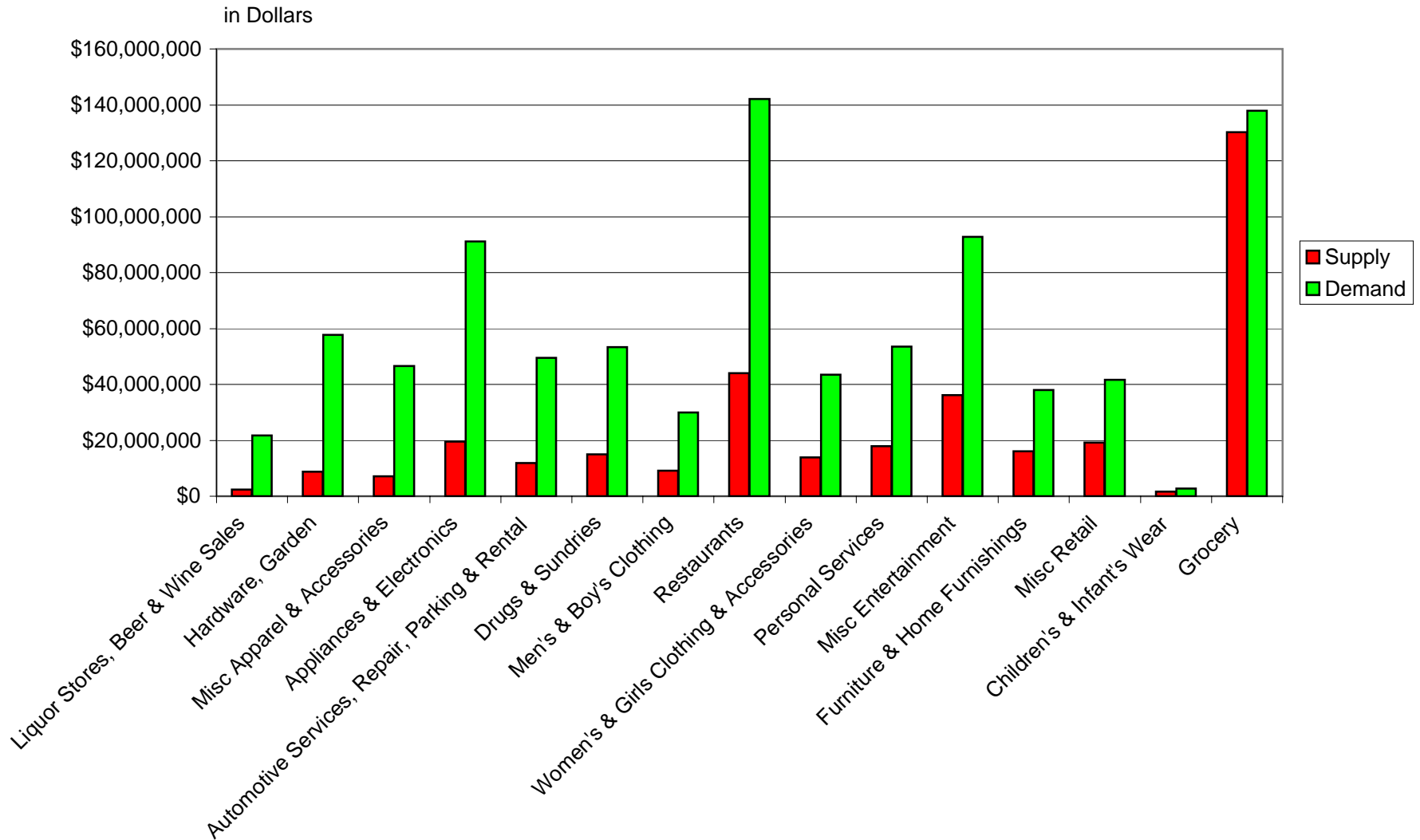
Friendswood, Texas

CATEGORY	DEMAND: CONSUMER SPENDING CAPACITY	SUPPLY: GROSS SALES AT YEAR END	TRADE SURPLUS + TRADE DEFICIT -	% UNMET MARKET CAPACITY
Liquor Stores, Beer & Wine Sales	\$21,744,852	\$2,400,000	-\$19,344,852	89%
Hardware, Garden	\$57,645,964	\$8,700,000	-\$48,945,964	85%
Misc Apparel & Accessories	\$46,630,603	\$7,048,000	-\$39,582,603	85%
Appliances & Electronics	\$91,162,740	\$19,459,000	-\$71,703,740	79%
Automotive Services, Repair, Parking & Rental	\$49,543,188	\$11,800,000	-\$37,743,188	76%
Drugs & Sundries	\$53,265,747	\$15,068,200	-\$38,197,547	72%
Men's & Boy's Clothing	\$30,041,428	\$9,080,000	-\$20,961,428	70%
Restaurants	\$142,171,434	\$44,000,000	-\$98,171,434	69%
Women's & Girls Clothing & Accessories	\$43,505,518	\$13,920,000	-\$29,585,518	68%
Personal Services	\$53,542,053	\$17,900,000	-\$35,642,053	67%
Misc Entertainment	\$92,718,027	\$36,100,000	-\$56,618,027	61%
Furniture & Home Furnishings	\$38,005,701	\$16,038,800	-\$21,966,901	58%
Misc Retail	\$41,633,629	\$19,224,000	-\$22,409,629	54%
Children's & Infant's Wear	\$2,743,634	\$1,562,000	-\$1,181,634	43%
Grocery	\$137,820,708	\$130,200,000	-\$7,620,708	6%
RETAIL TOTAL	\$902,175,226	\$352,500,000		

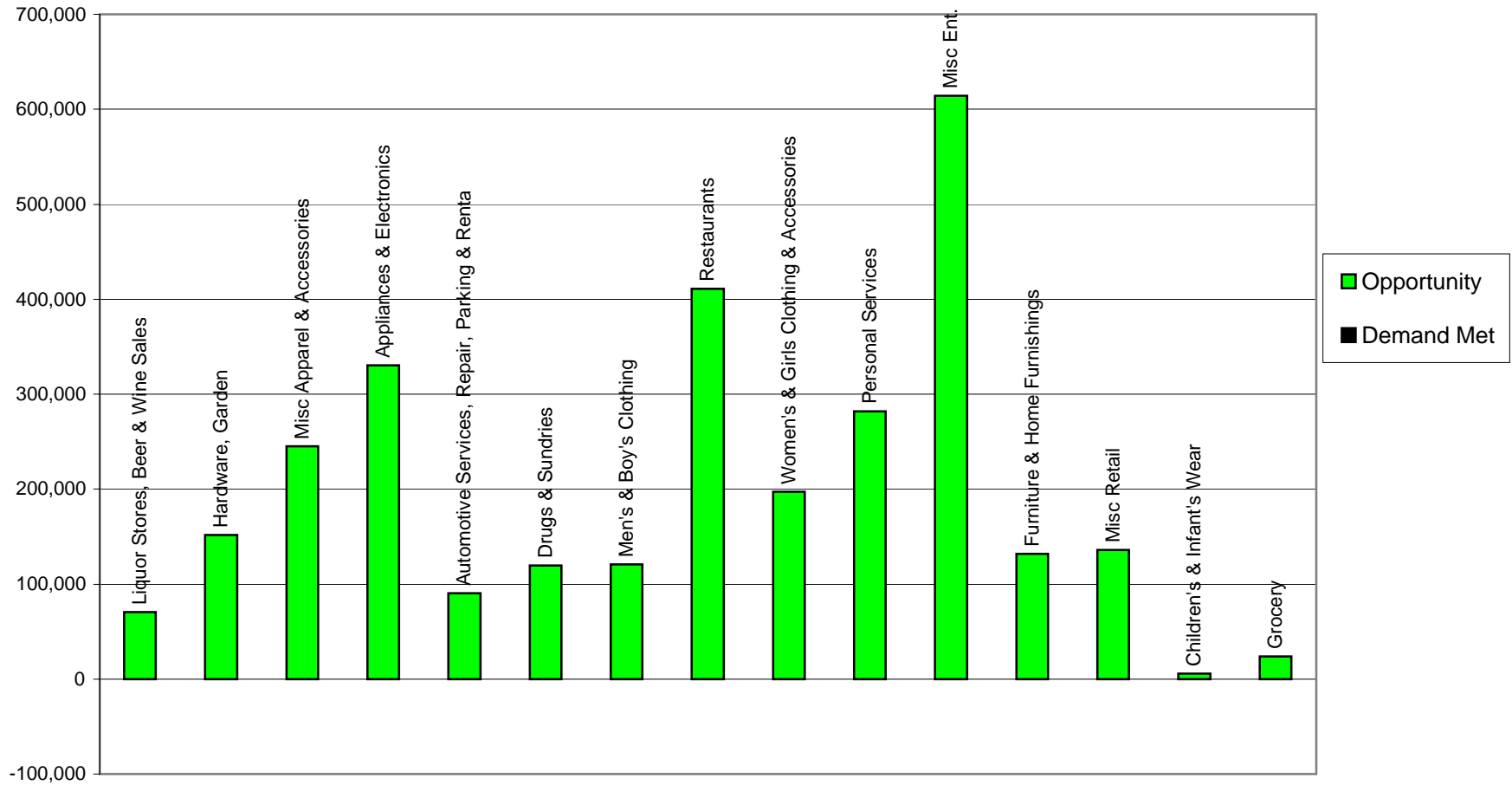
**RETAIL SQUARE FEET ESTIMATES
 BASED ON UNMET DEMAND
 3 Mile Radius
 Friendswood, Texas**

CATEGORY	TRADE SURPLUS + TRADE DEFICIT -	% UNMET MARKET CAPACITY	AVG REGIONAL SALES PER SQUARE FOOT	UNMET SQUARE FEET
Liquor Stores, Beer & Wine Sales	-\$19,344,852	88.96%	\$274.11	70,574
Hardware, Garden	-\$48,945,964	84.91%	\$323.03	151,523
Misc Apparel & Accessories	-\$39,582,603	84.89%	\$161.34	245,344
Appliances & Electronics	-\$71,703,740	78.65%	\$216.96	330,494
Automotive Services, Repair, Parking & Rental	-\$37,743,188	76.18%	\$418.46	90,195
Drugs & Sundries	-\$38,197,547	71.71%	\$319.34	119,614
Men's & Boy's Clothing	-\$20,961,428	69.78%	\$173.48	120,832
Restaurants	-\$98,171,434	69.05%	\$238.97	410,802
Women's & Girls Clothing & Accessories	-\$29,585,518	68.00%	\$150.13	197,070
Personal Services	-\$35,642,053	66.57%	\$126.37	282,041
Misc Entertainment	-\$56,618,027	61.06%	\$92.20	614,081
Furniture & Home Furnishings	-\$21,966,901	57.80%	\$166.51	131,926
Misc Retail	-\$22,409,629	53.83%	\$164.64	136,113
Children's & Infant's Wear	-\$1,181,634	43.07%	\$200.98	5,879
Grocery	-\$7,620,708	5.53%	\$316.80	24,055

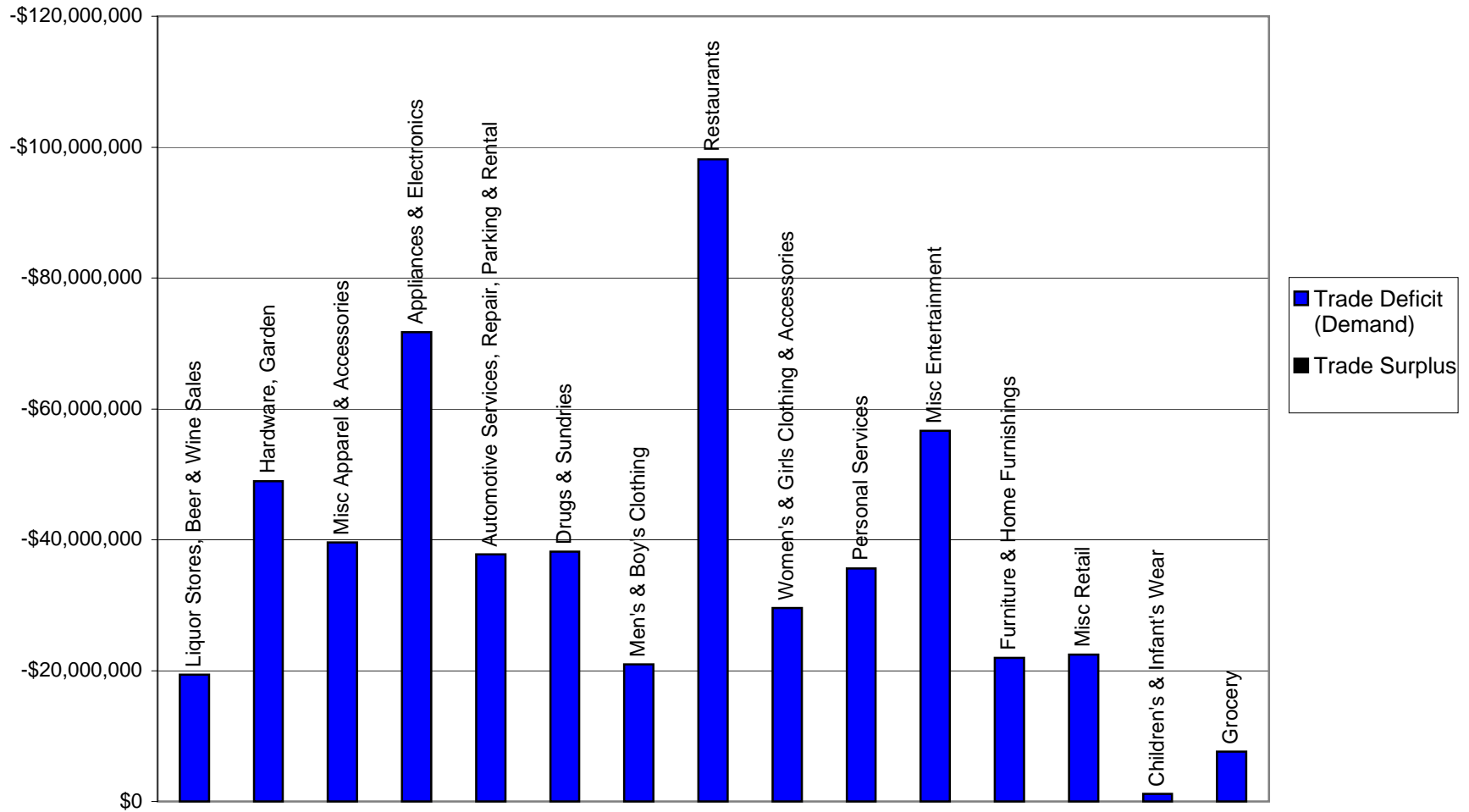
Supply and Demand by Retail Category



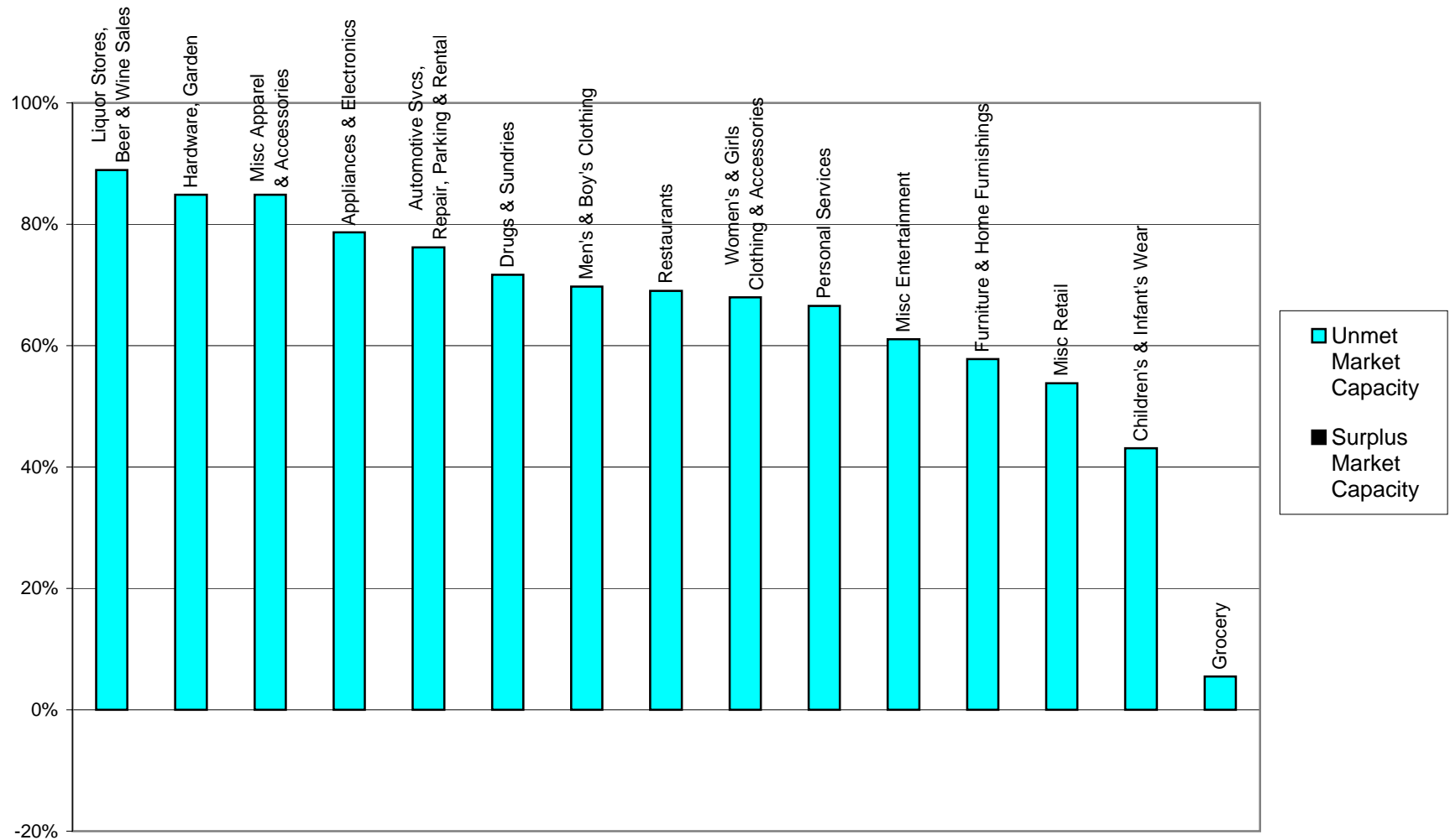
Unmet Square Feet of Retail Demand by Retail Category



Dollars of Unmet Demand or Surplus Sales by Retail Category



Percentage of Unmet Market Capacity by Retail Category



POPULATION AND INCOME TREND
3 Mile Radius
Friendswood, Texas

	CENSUS 2000	ESTIMATE 2007	% CHG	PROJECTED 2012	% CHG
Population	47,360	57,850	22.1%	64,251	11.1%
Households	16,505	20,202	22.4%	22,463	11.2%
Families	12,971	15,888	22.5%	17,665	11.2%
Housing Units	17,101	21,070	23.2%	23,450	11.3%
Group Quarter Population	279	300	7.5%	321	7.0%
Household Size	2.85	2.85	0%	2.85	0%
Aggregate(\$MM)	\$1,264	\$1,781	40.9%	\$2,168	21.7%
Per Capita Income	\$26,829	\$30,880	15.1%	\$33,828	9.5%

HOUSEHOLD INCOME DISTRIBUTION
3 Mile Radius
Friendswood, Texas

INCOME	2000	%	2007	%	2012	%
	# HH		# HH		# HH	
Less than \$15,000	882	5.3%	914	4.5%	939	4.2%
\$15,000 to \$24,999	992	6.0%	971	4.8%	977	4.3%
\$25,000 to \$34,999	1,178	7.1%	1,252	6.2%	1,269	5.6%
\$35,000 to \$49,999	2,455	14.9%	2,674	13.2%	2,559	11.4%
\$50,000 to \$74,999	4,103	24.8%	4,400	21.8%	4,611	20.5%
\$75,000 to \$99,999	3,129	18.9%	3,731	18.5%	4,009	17.8%
\$100,000 to \$149,999	2,655	16.1%	4,220	20.9%	5,054	22.5%
\$150,000 to \$249,999	904	5.5%	1,595	7.9%	2,339	10.4%
\$250,000 to \$499,999	179	1.1%	352	1.7%	543	2.4%
\$500,000 or more	36	0.2%	93	0.5%	163	0.7%
Total	16,513	100.0%	20,202	100.0%	22,463	100.0%
Average Household Income	76,555		88,155		96,494	
Median Household Income	66,752		74,372		80,468	

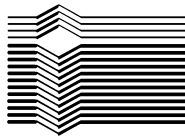
THE ROAN REPORT®

**5 Mile Radius
Friendswood, Texas**

"A Diagnostic Analysis of Retail Potential"

July 2008

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KEY FINDINGS

1. New Retail Opportunity: Findings suggest that the following business categories offer the greatest retail opportunities for consumers and taxing jurisdictions at this time:

- Liquor Stores, Beer & Wine Sales
- Drugs & Sundries
- Personal Services
- Automotive Services, Repair, Parking & Rental
- Misc Entertainment
- Appliances & Electronics
- Hardware, Garden
- Grocery
- Restaurants

2. Annual Sales Tax Revenue Potential: New sales tax revenues which could be generated each year with the capture of these retail opportunities are as follows:

Jurisdiction	Potential New Sales Tax Revenue
State	\$19,228,015
City	\$4,614,724
Total	\$23,842,739

**Assumes the businesses are located within incorporated cities. Special tax rates may apply to certain goods for example jewelry and tobacco.*

3. Retail Needs Met: Basic retail demand is now met in the trade area for the following categories:

- Men's & Boy's Clothing
- Misc Apparel & Accessories
- Misc Retail
- Women's & Girls Clothing & Accessories
- Furniture & Home Furnishings
- Children's & Infant's Wear

4. Population and Income Trends in the Study Area: Annual population and income trends are as follows:

	Studied Area	United States
• Average Household Income	\$80,695	\$66,670
• % Households with Incomes \$35K+	80.6%	64.9%
• Population Change 2000 to 2007	26.9%	7.0%

5. Retail Opportunities - Unmet Retail Demand: Retail opportunities, or unmet retail demand, and its supportable square footage is currently demonstrated in the following categories:

Category	% Unmet Capacity	Available Dollars	Supportable Square Feet
Liquor Stores, Beer & Wine Sales	90%	\$38,964,101	142,149
Drugs & Sundries	51%	\$53,726,103	168,242
Personal Services	46%	\$46,639,999	369,070
Automotive Services, Repair, Parking & Rental	43%	\$41,782,205	99,847
Misc Entertainment	42%	\$73,007,774	791,844
Appliances & Electronics	24%	\$43,115,513	198,726
Hardware, Garden	20%	\$21,757,596	67,355
Grocery	17%	\$46,832,725	147,831
Restaurants	9%	\$24,857,521	104,017
Retail Totals		\$390,683,537	2,089,081

6. Estimate of Annual Retail Jobs Associated with this Square Footage: 4,178

Note: In trade areas with five or fewer retail outlets in a single category, supply data from the tax records may have been suppressed.

RETAIL OPPORTUNITY ANALYSIS

5 Mile Radius

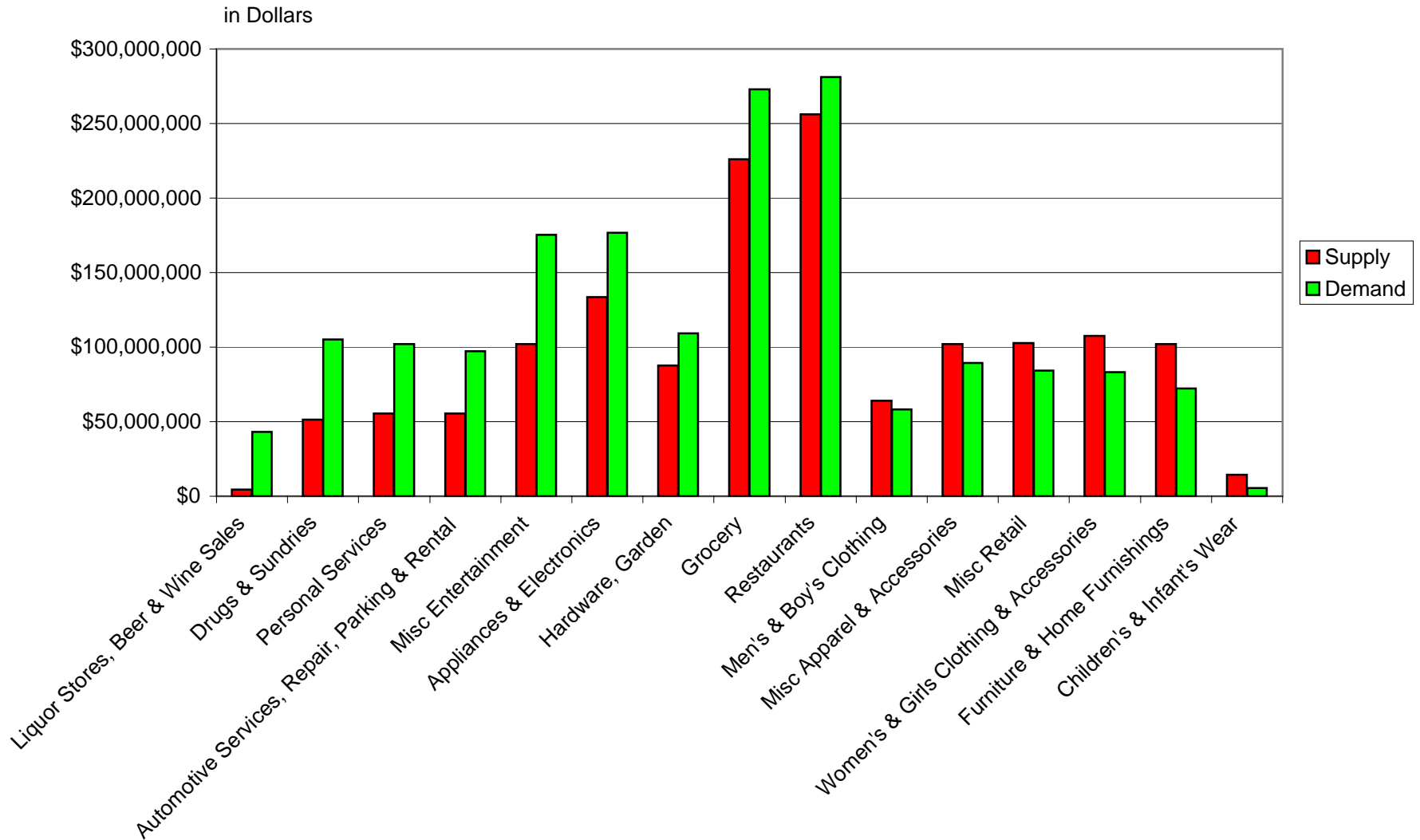
Friendswood, Texas

CATEGORY	DEMAND: CONSUMER SPENDING CAPACITY	SUPPLY: GROSS SALES AT YEAR END	TRADE SURPLUS + TRADE DEFICIT -	% UNMET MARKET CAPACITY
Liquor Stores, Beer & Wine Sales	\$43,264,101	\$4,300,000	-\$38,964,101	90%
Drugs & Sundries	\$105,202,803	\$51,476,700	-\$53,726,103	51%
Personal Services	\$102,039,999	\$55,400,000	-\$46,639,999	46%
Automotive Services, Repair, Parking & Rental	\$97,182,205	\$55,400,000	-\$41,782,205	43%
Misc Entertainment	\$175,207,774	\$102,200,000	-\$73,007,774	42%
Appliances & Electronics	\$176,782,013	\$133,666,500	-\$43,115,513	24%
Hardware, Garden	\$109,357,596	\$87,600,000	-\$21,757,596	20%
Grocery	\$272,932,725	\$226,100,000	-\$46,832,725	17%
Restaurants	\$281,157,521	\$256,300,000	-\$24,857,521	9%
Men's & Boy's Clothing	\$58,354,888	\$63,980,000	\$5,625,112	-10%
Misc Apparel & Accessories	\$89,347,520	\$101,988,000	\$12,640,480	-14%
Misc Retail	\$84,234,189	\$102,894,000	\$18,659,811	-22%
Women's & Girls Clothing & Accessories	\$83,130,757	\$107,570,000	\$24,439,243	-29%
Furniture & Home Furnishings	\$72,309,941	\$102,077,800	\$29,767,859	-41%
Children's & Infant's Wear	\$5,601,481	\$14,247,000	\$8,645,519	-154%
RETAIL TOTAL	\$1,756,105,513	\$1,465,200,000		

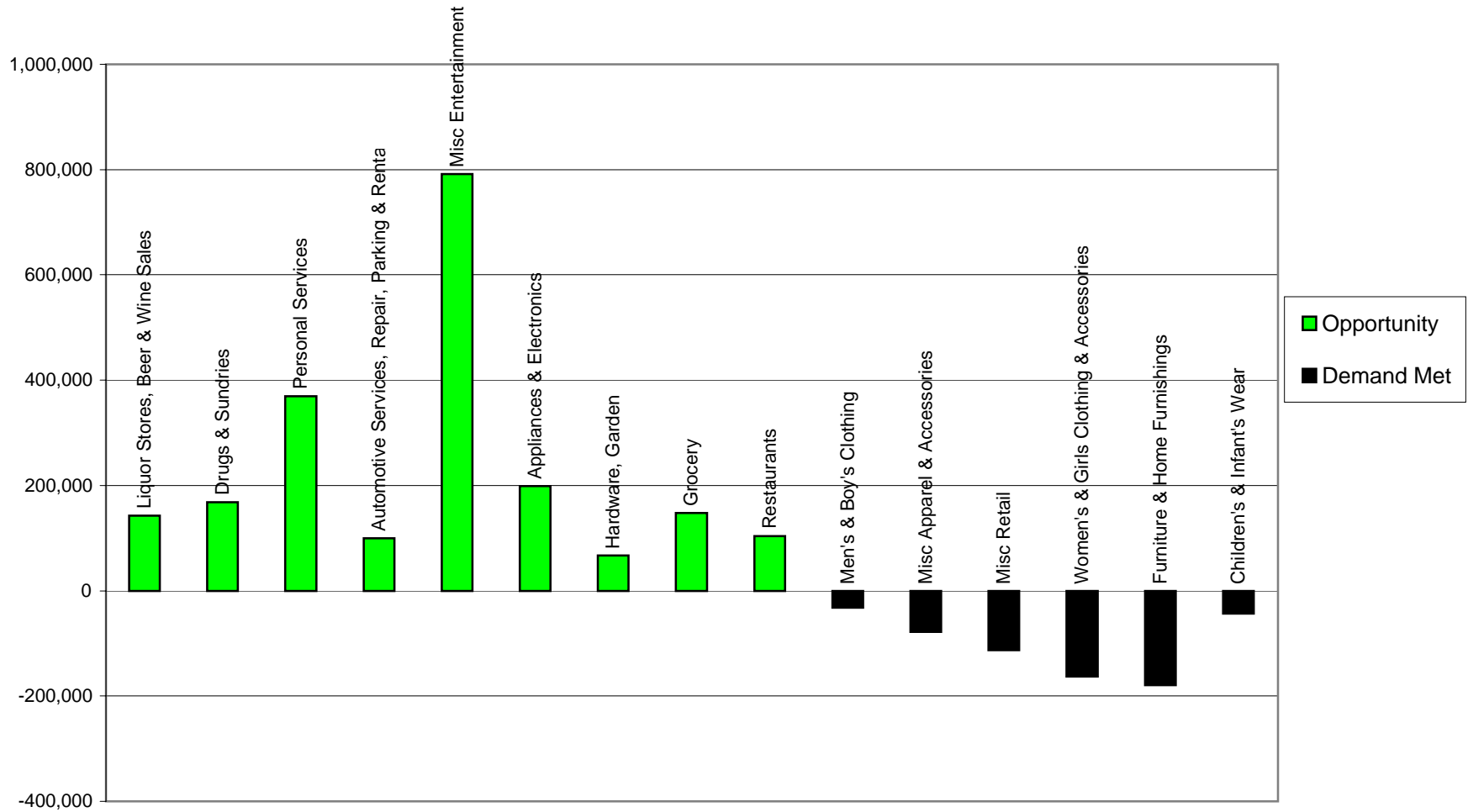
**RETAIL SQUARE FEET ESTIMATES
 BASED ON UNMET DEMAND
 5 Mile Radius
 Friendswood, Texas**

CATEGORY	TRADE SURPLUS + TRADE DEFICIT -	% UNMET MARKET CAPACITY	AVG REGIONAL SALES PER SQUARE FOOT	UNMET SQUARE FEET
Liquor Stores, Beer & Wine Sales	-\$38,964,101	90.06%	\$274.11	142,149
Drugs & Sundries	-\$53,726,103	51.07%	\$319.34	168,242
Personal Services	-\$46,639,999	45.71%	\$126.37	369,070
Automotive Services, Repair, Parking & Rental	-\$41,782,205	42.99%	\$418.46	99,847
Misc Entertainment	-\$73,007,774	41.67%	\$92.20	791,844
Appliances & Electronics	-\$43,115,513	24.39%	\$216.96	198,726
Hardware, Garden	-\$21,757,596	19.90%	\$323.03	67,355
Grocery	-\$46,832,725	17.16%	\$316.80	147,831
Restaurants	-\$24,857,521	8.84%	\$238.97	104,017
Men's & Boy's Clothing	\$5,625,112	-9.64%	\$173.48	-32,426
Misc Apparel & Accessories	\$12,640,480	-14.15%	\$161.34	-78,349
Misc Retail	\$18,659,811	-22.15%	\$164.64	-113,338
Women's & Girls Clothing & Accessories	\$24,439,243	-29.40%	\$150.13	-162,790
Furniture & Home Furnishings	\$29,767,859	-41.17%	\$166.51	-178,777
Children's & Infant's Wear	\$8,645,519	-154.34%	\$200.98	-43,018

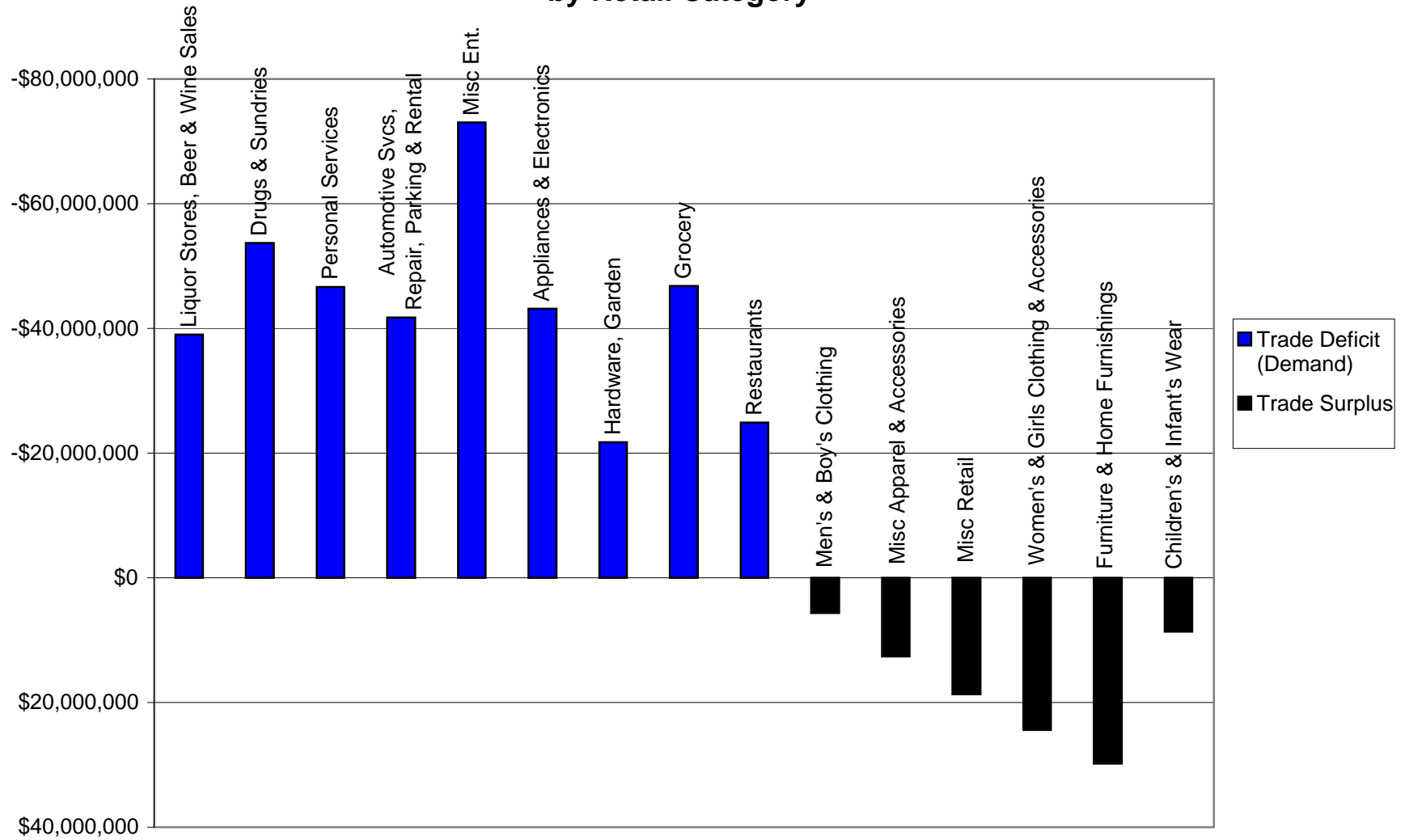
Supply and Demand by Retail Category



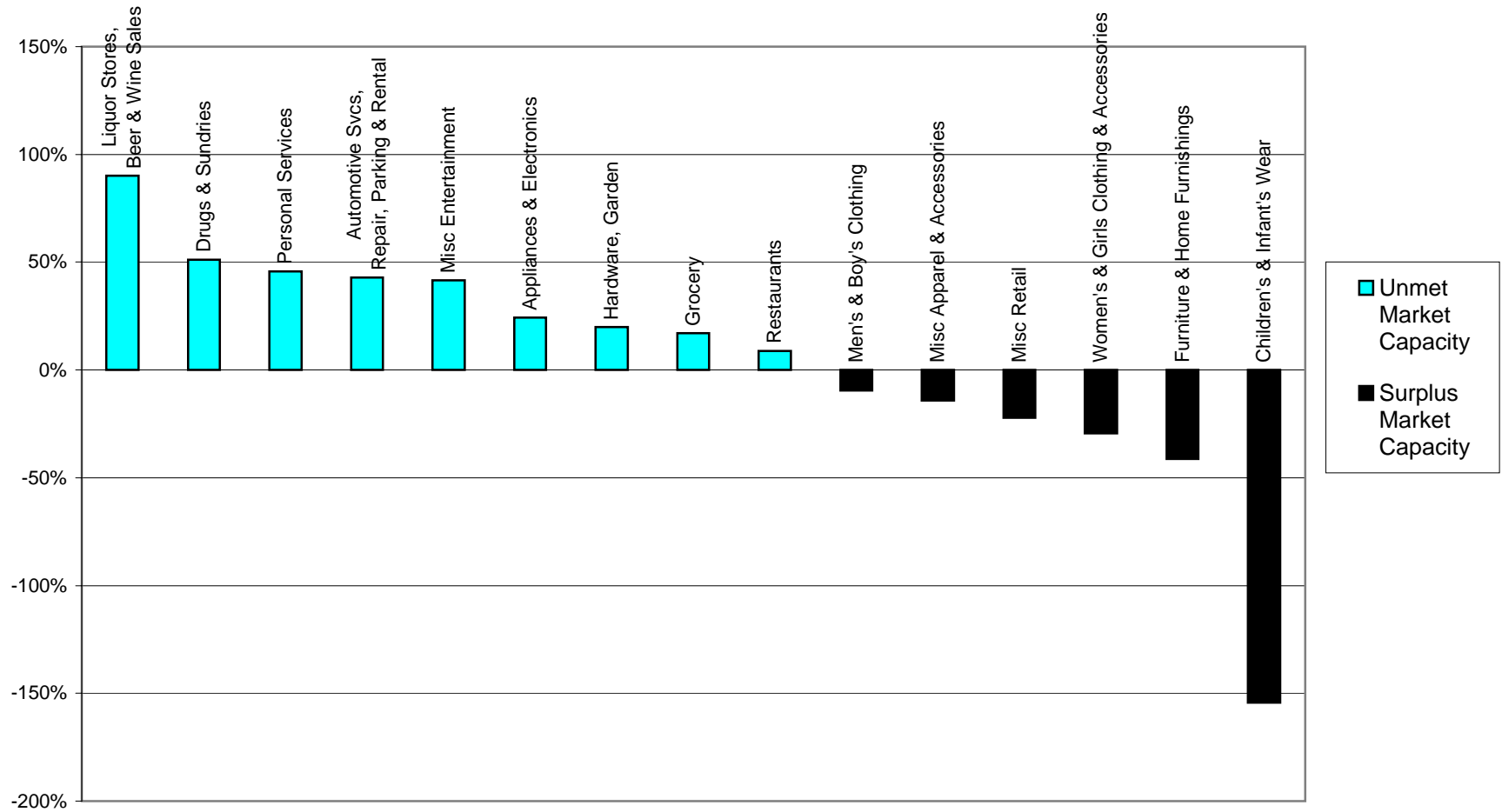
Unmet Square Feet of Retail Demand by Retail Category



Dollars of Unmet Demand or Surplus Sales by Retail Category



Percentage of Unmet Market Capacity by Retail Category



POPULATION AND INCOME TREND
5 Mile Radius
Friendswood, Texas

	CENSUS 2000	ESTIMATE 2007	% CHG	PROJECTED 2012	% CHG
Population	91,154	115,699	26.9%	130,686	13.0%
Households	32,963	41,704	26.5%	47,125	13.0%
Families	24,529	31,409	28.0%	35,666	13.6%
Housing Units	34,424	43,831	27.3%	49,524	13.0%
Group Quarter Population	598	643	7.5%	690	7.3%
Household Size	2.75	2.76	0%	2.76	0%
Aggregate(\$MM)	\$2,318	\$3,365	45.2%	\$4,177	24.1%
Per Capita Income	\$25,577	\$29,194	14.1%	\$32,065	9.8%

HOUSEHOLD INCOME DISTRIBUTION
5 Mile Radius
Friendswood, Texas

INCOME	2000	%	2007	%	2012	%
	# HH		# HH		# HH	
Less than \$15,000	2,160	6.5%	2,268	5.4%	2,307	4.9%
\$15,000 to \$24,999	2,428	7.4%	2,509	6.0%	2,558	5.4%
\$25,000 to \$34,999	3,130	9.5%	3,328	8.0%	3,375	7.2%
\$35,000 to \$49,999	5,002	15.2%	5,767	13.8%	5,857	12.4%
\$50,000 to \$74,999	8,236	24.9%	9,269	22.2%	9,739	20.7%
\$75,000 to \$99,999	5,804	17.6%	7,374	17.7%	8,213	17.4%
\$100,000 to \$149,999	4,521	13.7%	7,853	18.8%	9,881	21.0%
\$150,000 to \$249,999	1,442	4.4%	2,689	6.4%	4,120	8.7%
\$250,000 to \$499,999	248	0.8%	518	1.2%	839	1.8%
\$500,000 or more	42	0.1%	127	0.3%	235	0.5%
Total	33,013	100.0%	41,702	100.0%	47,124	100.0%
Average Household Income	70,210		80,695		88,637	
Median Household Income	61,494		68,823		74,295	

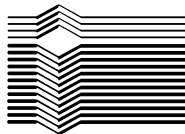
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- Liquor Stores, Beer & Wine Sales
- Drugs & Sundries
- Automotive Services, Repair, Parking & Rental
- Personal Services
- Misc Apparel & Accessories
- Men's & Boy's Clothing
- Misc Entertainment
- Appliances & Electronics
- Restaurants
- Women's & Girls Clothing & Accessories
- Grocery
- Furniture & Home Furnishings

2. Annual Sales Tax Revenue Potential: New sales tax revenues which could be generated each year with the capture of these retail opportunities are as follows:

Jurisdiction	Potential New Sales Tax Revenue
State	\$43,208,273
City	\$10,369,986
Total	\$53,578,259

**Assumes the businesses are located within incorporated cities. Special tax rates may apply to certain goods for example jewelry and tobacco.*

3. Retail Needs Met: Basic retail demand is now met in the trade area for the following categories:

- Hardware, Garden
- Misc Retail
- Children's & Infant's Wear

4. Population and Income Trends in the Study Area: Annual population and income trends are as follows:

	Studied Area	United States
• Average Household Income	\$80,024	\$66,670
• % Households with Incomes \$35K+	78.4%	64.9%
• Population Change 2000 to 2007	20.7%	7.0%

5. Retail Opportunities - Unmet Retail Demand: Retail opportunities, or unmet retail demand, and its supportable square footage is currently demonstrated in the following categories:

Category	% Unmet Capacity	Available Dollars	Supportable Square Feet
Liquor Stores, Beer & Wine Sales	91%	\$80,205,376	292,605
Drugs & Sundries	53%	\$116,371,628	364,414
Automotive Services, Repair, Parking & Rental	47%	\$91,407,981	218,437
Personal Services	44%	\$91,523,138	724,238
Misc Apparel & Accessories	31%	\$56,312,535	349,041
Men's & Boy's Clothing	29%	\$33,661,868	194,044
Misc Entertainment	25%	\$86,964,419	943,219
Appliances & Electronics	23%	\$81,792,205	376,993
Restaurants	18%	\$102,520,532	429,001
Women's & Girls Clothing & Accessories	16%	\$26,361,488	175,595
Grocery	14%	\$74,706,290	235,816
Furniture & Home Furnishings	5%	\$7,451,661	44,752
Retail Totals		\$849,279,121	4,348,155

6. Estimate of Annual Retail Jobs Associated with this Square Footage: 8,696

Note: In trade areas with five or fewer retail outlets in a single category, supply data from the tax records may have been suppressed.

RETAIL OPPORTUNITY ANALYSIS

7 Mile Radius

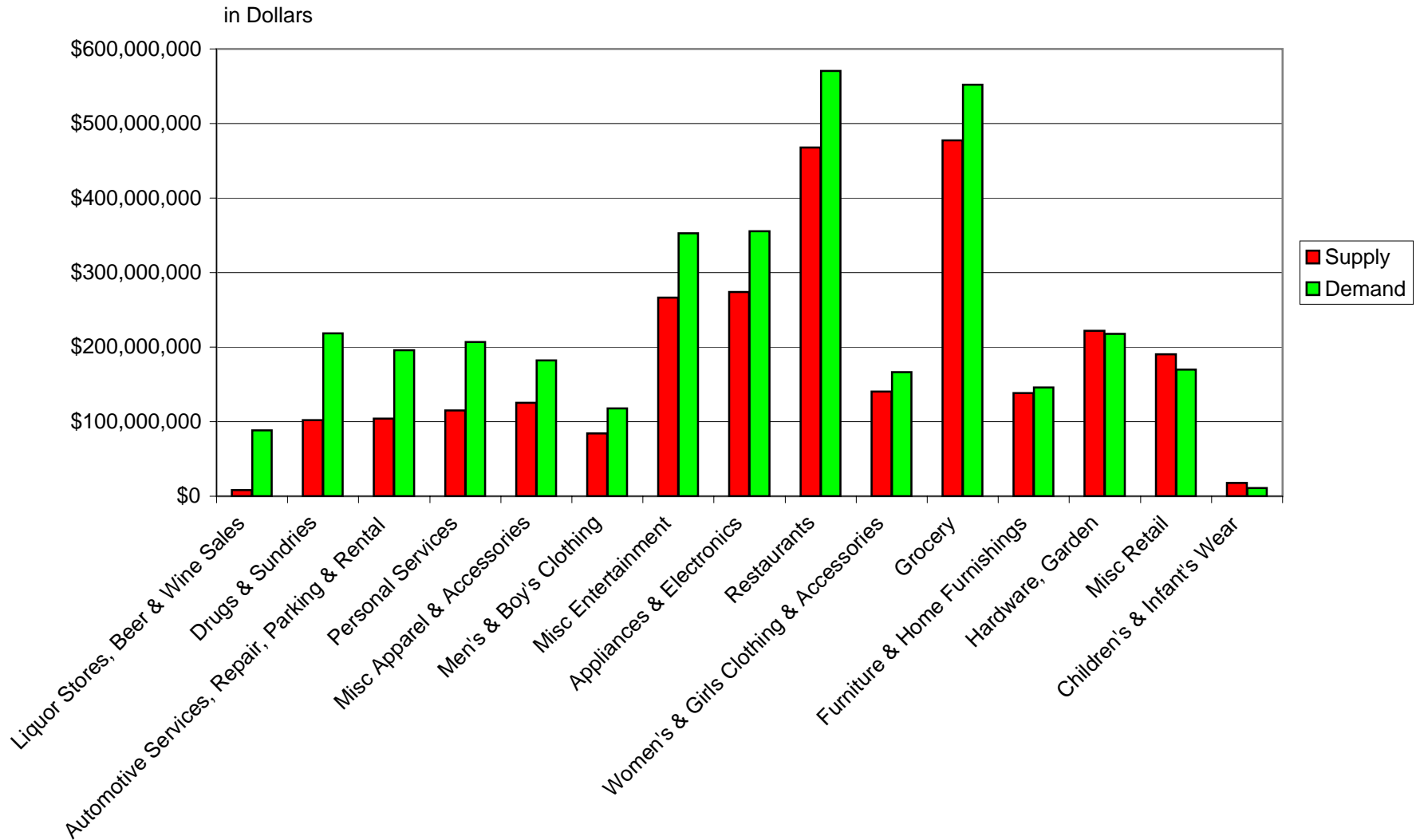
Friendswood, Texas

CATEGORY	DEMAND: CONSUMER SPENDING CAPACITY	SUPPLY: GROSS SALES AT YEAR END	TRADE SURPLUS + TRADE DEFICIT -	% UNMET MARKET CAPACITY
Liquor Stores, Beer & Wine Sales	\$88,505,376	\$8,300,000	-\$80,205,376	91%
Drugs & Sundries	\$218,489,828	\$102,118,200	-\$116,371,628	53%
Automotive Services, Repair, Parking & Rental	\$195,607,981	\$104,200,000	-\$91,407,981	47%
Personal Services	\$206,523,138	\$115,000,000	-\$91,523,138	44%
Misc Apparel & Accessories	\$181,960,535	\$125,648,000	-\$56,312,535	31%
Men's & Boy's Clothing	\$117,741,868	\$84,080,000	-\$33,661,868	29%
Misc Entertainment	\$353,064,419	\$266,100,000	-\$86,964,419	25%
Appliances & Electronics	\$355,601,205	\$273,809,000	-\$81,792,205	23%
Restaurants	\$570,420,532	\$467,900,000	-\$102,520,532	18%
Women's & Girls Clothing & Accessories	\$166,581,488	\$140,220,000	-\$26,361,488	16%
Grocery	\$551,806,290	\$477,100,000	-\$74,706,290	14%
Furniture & Home Furnishings	\$145,990,461	\$138,538,800	-\$7,451,661	5%
Hardware, Garden	\$217,705,376	\$221,600,000	\$3,894,624	-2%
Misc Retail	\$169,930,459	\$190,224,000	\$20,293,541	-12%
Children's & Infant's Wear	\$11,128,918	\$17,562,000	\$6,433,082	-58%
RETAIL TOTAL	\$3,551,057,874	\$2,732,400,000		

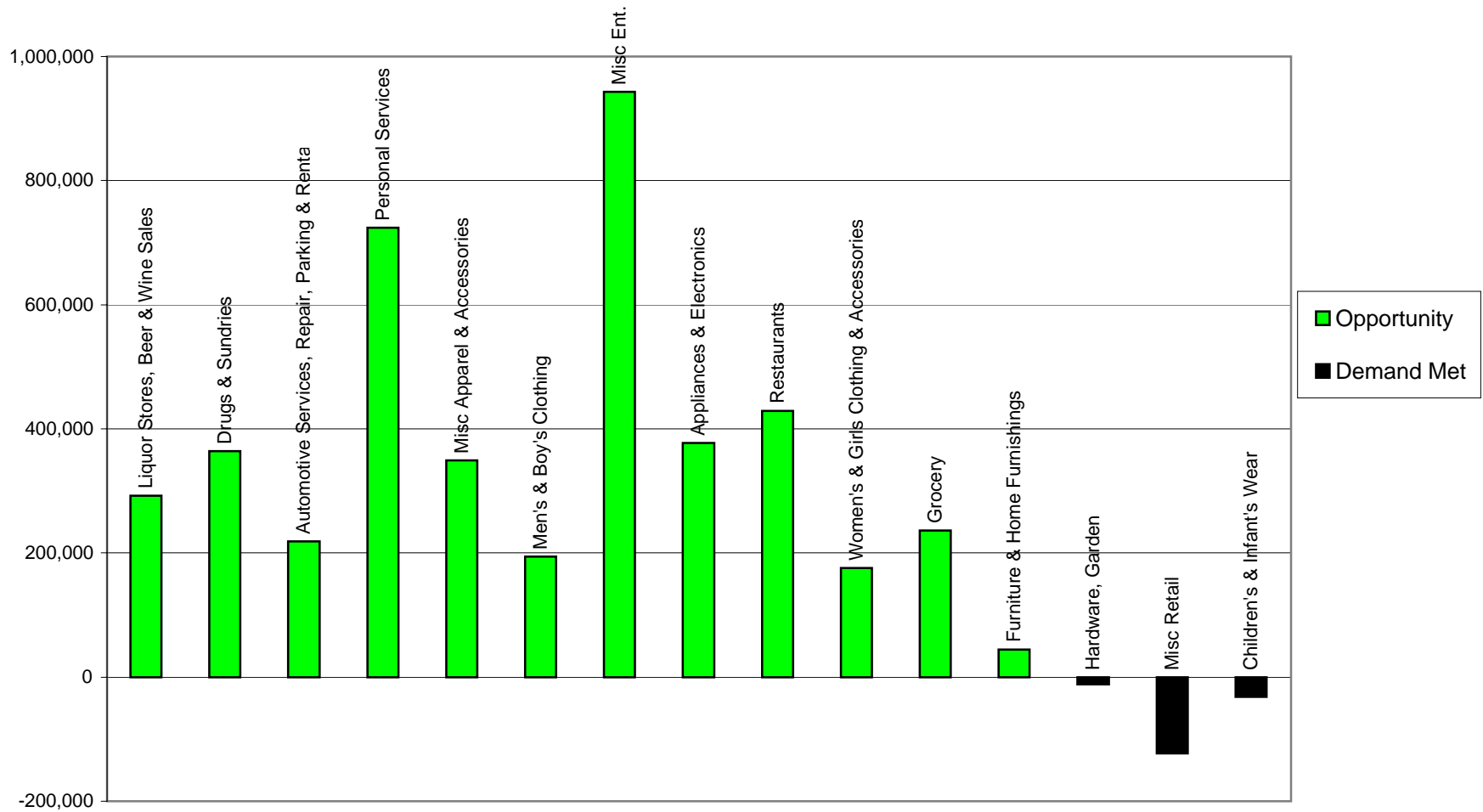
**RETAIL SQUARE FEET ESTIMATES
 BASED ON UNMET DEMAND
 7 Mile Radius
 Friendswood, Texas**

CATEGORY	TRADE SURPLUS + TRADE DEFICIT -	% UNMET MARKET CAPACITY	AVG REGIONAL SALES PER SQUARE FOOT	UNMET SQUARE FEET
Liquor Stores, Beer & Wine Sales	-\$80,205,376	90.62%	\$274.11	292,605
Drugs & Sundries	-\$116,371,628	53.26%	\$319.34	364,414
Automotive Services, Repair, Parking & Rental	-\$91,407,981	46.73%	\$418.46	218,437
Personal Services	-\$91,523,138	44.32%	\$126.37	724,238
Misc Apparel & Accessories	-\$56,312,535	30.95%	\$161.34	349,041
Men's & Boy's Clothing	-\$33,661,868	28.59%	\$173.48	194,044
Misc Entertainment	-\$86,964,419	24.63%	\$92.20	943,219
Appliances & Electronics	-\$81,792,205	23.00%	\$216.96	376,993
Restaurants	-\$102,520,532	17.97%	\$238.97	429,001
Women's & Girls Clothing & Accessories	-\$26,361,488	15.82%	\$150.13	175,595
Grocery	-\$74,706,290	13.54%	\$316.80	235,816
Furniture & Home Furnishings	-\$7,451,661	5.10%	\$166.51	44,752
Hardware, Garden	\$3,894,624	-1.79%	\$323.03	-12,057
Misc Retail	\$20,293,541	-11.94%	\$164.64	-123,261
Children's & Infant's Wear	\$6,433,082	-57.81%	\$200.98	-32,009

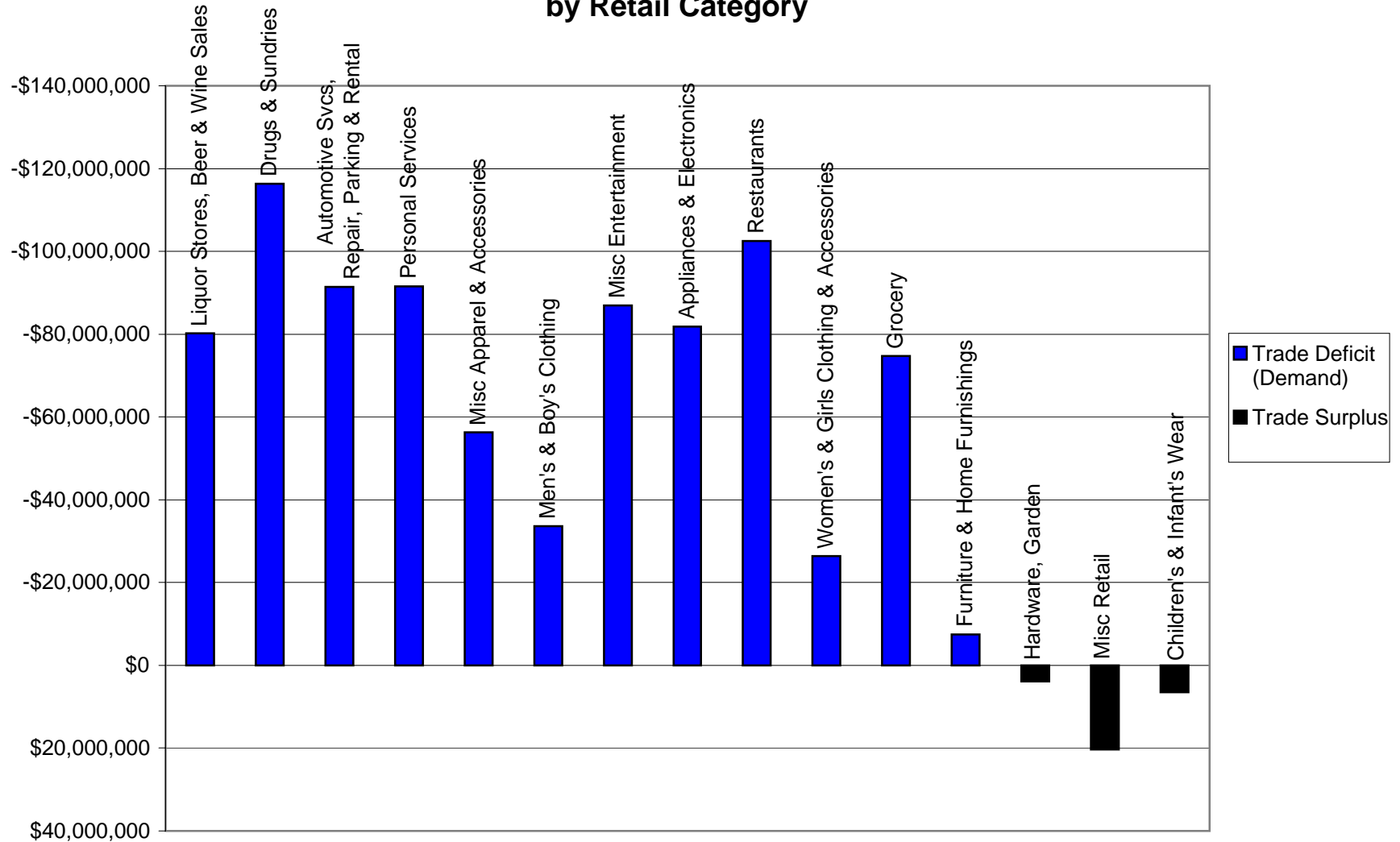
Supply and Demand by Retail Category



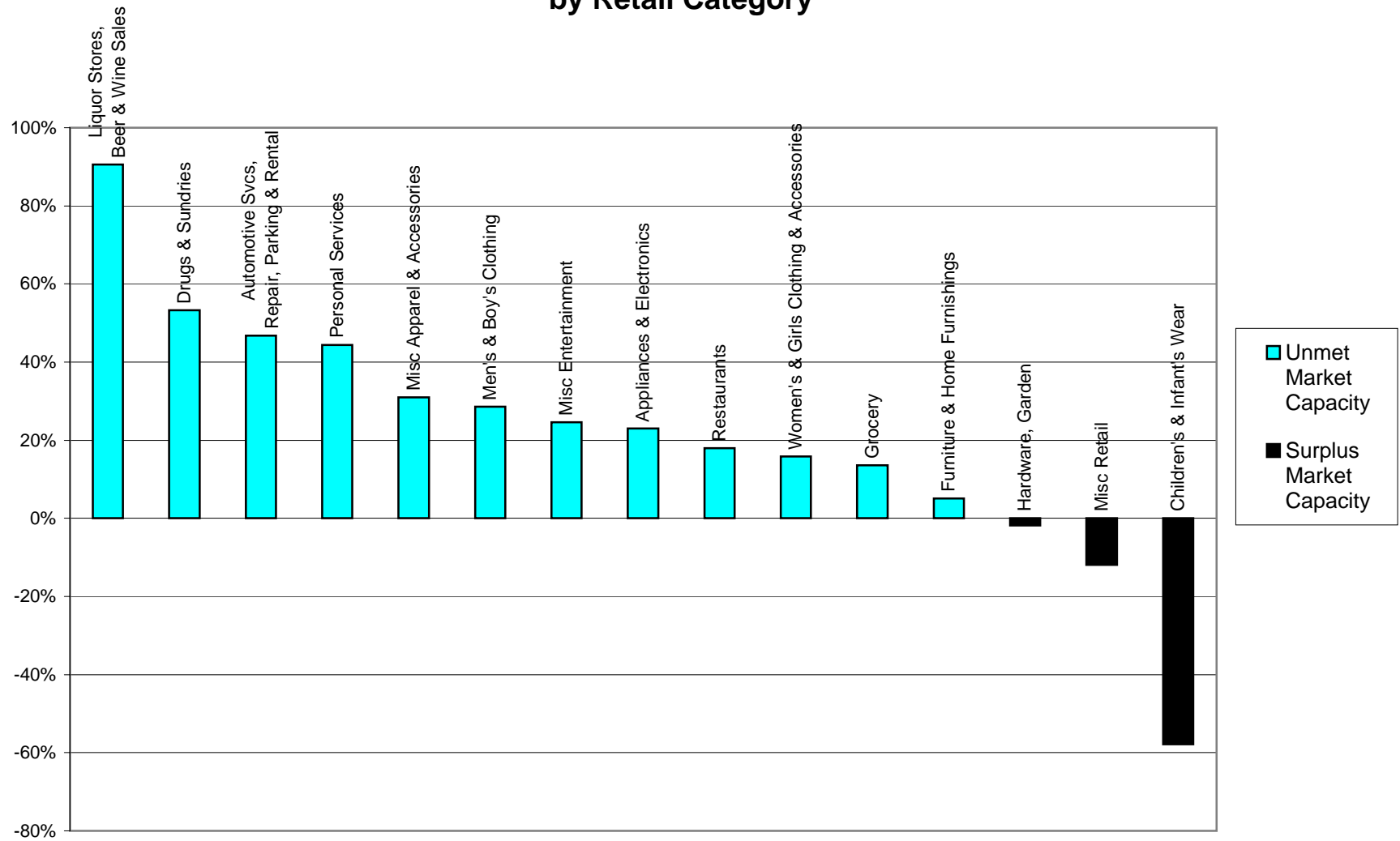
Unmet Square Feet of Retail Demand by Retail Category



Dollars of Unmet Demand or Surplus Sales by Retail Category



Percentage of Unmet Market Capacity by Retail Category



POPULATION AND INCOME TREND
7 Mile Radius
Friendswood, Texas

	CENSUS 2000	ESTIMATE 2007	% CHG	PROJECTED 2012	% CHG
Population	194,225	234,453	20.7%	259,038	10.5%
Households	71,553	85,765	19.9%	94,576	10.3%
Families	51,882	62,841	21.1%	69,621	10.8%
Housing Units	75,265	90,889	20.8%	100,147	10.2%
Group Quarter Population	1,231	1,353	9.9%	1,435	6.1%
Household Size	2.70	2.72	1%	2.72	0%
Aggregate(\$MM)	\$4,998	\$6,863	37.3%	\$8,276	20.6%
Per Capita Income	\$25,832	\$29,389	13.8%	\$32,061	9.1%

HOUSEHOLD INCOME DISTRIBUTION
7 Mile Radius
Friendswood, Texas

INCOME	2000	%	2007	%	2012	%
	# HH		# HH		# HH	
Less than \$15,000	5,223	7.3%	5,333	6.2%	5,379	5.7%
\$15,000 to \$24,999	5,740	8.0%	5,789	6.7%	5,789	6.1%
\$25,000 to \$34,999	7,303	10.2%	7,421	8.7%	7,388	7.8%
\$35,000 to \$49,999	10,944	15.3%	12,134	14.1%	12,334	13.0%
\$50,000 to \$74,999	17,184	24.0%	18,608	21.7%	19,237	20.3%
\$75,000 to \$99,999	11,411	15.9%	13,748	16.0%	15,087	16.0%
\$100,000 to \$149,999	9,821	13.7%	15,416	18.0%	18,611	19.7%
\$150,000 to \$249,999	3,315	4.6%	5,795	6.8%	8,362	8.8%
\$250,000 to \$499,999	623	0.9%	1,187	1.4%	1,831	1.9%
\$500,000 or more	132	0.2%	335	0.4%	558	0.6%
Total	71,696	100.0%	85,766	100.0%	94,576	100.0%
Average Household Income	69,715		80,024		87,507	
Median Household Income	59,657		66,399		71,310	

GUIDE TO INTERPRETING STATISTICAL SUPPLY AND DEMAND FINDINGS OF THE RETAIL OPPORTUNITY ANALYSIS

The Retail Opportunity Analysis in the preceding material is a diagnostic report which measures the balance between retail supply and retail demand in a designated geographic trade area. Dollar figures in the shaded column, "Trade Surplus or Trade Deficit," signal facts about consumer spending patterns and existing sales in the area designated for measurement.

Zero Dollars represents retail equilibrium, or economic balance between retail demand and retail supply in the trade area as geographically defined.

Negative Dollars signal potential retail opportunity, or unmet retail demand. Unless compelling reasons prohibit retail uses in this category, for example, unmet liquor demand in an area where liquor sales are not allowed, this is likely to present a retail opportunity.

Positive Dollars indicate that basic demand is met and that sales in the trade area as defined exceed expectations.

Should positive dollars result from the retail supply/demand diagnostic, the degree to which opportunity may still be present is dependent on two factors:

- A. The accuracy of the geographic trade area specified for measurement, and/or
- B. The type of goods or services as defined by industrial classification being measured.

Positive dollar figures for locally provided services, such as Personal Service, signal little retail opportunity, except in the case of a strong local competitor who might offer a clearly different product or service.

Positive dollar figures for destination draw are regionally appealing retail goods and services, such as Restaurants, General Merchandise and Miscellaneous Retail, indicate that the area serves as a destination draw effective at the time of measurement. In this case, educated consumers regularly come into the area for specific kinds of goods and services.

Amounts of positive dollars of more than twice the amount of retail demand mean that a well established draw pattern is in place. Additional restaurants with a different concept or exceptional service and food quality may do well in this retail environment. However, only exceptionally strong retail draw tenants are likely to succeed under such circumstances.

Limitations of the Uses of the Retail Opportunity Analysis:

This retail diagnostic report is intended for the use of retail professionals only.

1. Competitive trade areas for each type of retail goods or services vary substantially. The trade area designated for measurement should be specified by a retail marketing professional familiar with the retail draw patterns of the classified goods or services being tested.
2. Retail supply, represented by sales data, is drawn from data bases which are current to the end of the preceding tax year in which this analysis is being performed. Sales estimate adjustments for additional retail establishments, or those which have closed, should be made to the appropriately classified supply data, and Trade Surplus or Deficits be adjusted accordingly.
3. Due to available source data, results of this analysis are limited to the categories specified. Additional category refinement may be achieved through a detailed retail analysis by SIC code type within each broad retail classification.

RETAIL CATEGORIES WITHIN THE NORTH AMERICAN INDUSTRIAL CLASSIFICATION SYSTEM (NAICS)

A. Hardware, Garden

Building Materials, Hardware Stores, Paint Stores, Wallpaper, Nurseries, Household Services, Lawn Mowers, Decorative Hardware, Portable Building, Fencing, Bricks, and Lumber Yards.

B. Grocery

Supermarket, Convenience Stores, Bakeries, Food Retail Specialties, Delicatessen, Gourmet Shops, Meat and Seafood, Fruit and Vegetable Markets, Dairy Product Stores, Health Food Stores, Candy, Nuts, Cheeses.

C. Automotive Services, Repair, Parking & Rental

Automotive Services: Car, Truck and RV Rental/Lease, Parking Lots, Paint, Repair and Body Shops, Car Washes, Auto Detailing, Towing and Wrecking, Brake, Muffler Lube Services.

D. Men's & Boy's Clothing

Men's & Boy's Clothing, Work Clothes, Boy's Clothes, Upscale Men's Wear, Apparel accessory.

E. Women's Clothing & Accessories

Upscale Women's, Maternity, Women's Sportswear, Women's Specialty, Discount Apparel, Accessories, Hosiery, Discount Shoes, Dance Wear, Formal Wear, Larger Sizes, Resale Shops, Bridal Shops.

F. Children's & Infant's Wear

Children's Clothing, Children's Furnishings, Children's Accessories, Infants' Clothing, Infants' Furnishings, Infants' Accessories.

G. Misc Apparel & Accessories

Upscale Shoes, Discount Shoes, Sports Shoes, Boots, Family Clothing Stores, Jeans, Custom Tailors, Clothing Designers, Caps & Gowns, Uniforms, Wigs & Hair Goods

H. Furniture & Home Furnishing

Rattan, Bedding, Unfinished Furniture, Discount Furniture, Modern Furnishings, Flooring, Drapes and Upholstery, Design Studios, Upscale Furniture, Period Furnishings.

I. Appliances & Electronics

Vacuum, Electronics, Radio-Stereo/Television, Music Stores, Lighting, Piano and Organ, Major Appliance, Computer and Computer Software, Music and Video Tape Sales.

J. Restaurants

Restaurants, Sandwich Shops, Bakeries with seated service, Fast Food (with drive thru), Ice Cream, Hot Dog Stands, Drive-in Restaurants, Yogurt, Caterers, Cafes and Bars, Specialty Restaurants, including Barbecue, Chinese, Oriental, Polynesian, Mexican, American, Burgers, Steak Houses, Seafood, Italian, Cafeterias, Chicken, French, German, etc.

K. Drugs & Sundries

Drugstores, Proprietary, Pharmacy, Sundries

L. Liquor Stores, Beer & Wine Sales

Package Stores, Liquor Stores, Beer and Wine Sales, Liquor Sales at Eating and Drinking Establishments

M. Miscellaneous Retail

Miscellaneous Retail: Sporting Goods, Bookstores, Christian Books, Jewelry, Watches and Watch Repair, Toys, Games and Hobbies, Specialty Hobbies, Photo Developing, Cameras, Cards and Gifts, Imports, Paper Goods, Antiques, Home Accents, Leather Goods, Fabrics, Florists, Silk Flowers, Tobacco, Video, Frame Art and Galleries, Pool Supplies, Pet Stores, Pet Supplies, Photo Supplies, Health and Beauty, Bicycles, News Stands, Mail Order Houses, Direct Selling Organizations, Medical Retail, Feed and Farm Supplies, Farm Machinery and Tractors.

N. Personal Services

Personal Services: Shoe Repair, Tanning, Dance Studio, Health Studios, Rental Shops, Vision and Eyeglasses, Print Shops, Sign Shops, Mail Services, Dry Cleaners, Carpet Cleaning, Beauty Shops, Barber Shops, Nail and Manicures, Educational Centers, Locksmiths, Photo Studios, Funeral Homes, Tax Return Preparation.

O. Miscellaneous Entertainment

Movie Theaters, Video Rentals, Dancing Schools, Billiards, Amusement Parks, Membership Sports Clubs, Galleries, Museums, Martial Arts, Exercise Studios, Golf Ranges, Miniature Golf, Driving Ranges, Batting Cages, Video Arcades, Stables, Bowling Alley, Community Theater, Live Theatrical Performances, Concerts, Tourist Attractions.



INSIGHT RESEARCH
CORPORATION

INSIGHT RESEARCH CORPORATION

Our Mission

*“Insight Research Corporation clearly defines
the economic costs and benefits of project alternatives
so that decision makers have fully informed choices.”*

Insight Research Corporation is one of the nation's most respected and recognized economic analysis firms. Founded in 1981, the firm's custom approaches and pioneering methodologies have received wide industry acclaim. Completing assignments in the United States, Canada and Mexico -- in three languages and three currencies -- Insight Research Corporation has a long standing reputation for confidentiality, clarity, accuracy and added value.

Insight Research Corporation is a dominant competitor in several practice areas, including:

- Economic, Employment, and Investment Grade Tax Revenue Impact Analysis
- Cost/Benefit and Public Finance Analysis
- Simulation Modeling of Land Use Alternatives
- Economic Analysis of Transportation Improvements

Insight Research Corporation is noted for translating complex issues into clear communications for public audiences. To assure the complete objectivity of its work, Insight Research does no incentive negotiations; instead, providing its public and private clients with an independent, third-party statistical research laboratory.



**INSIGHT RESEARCH
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*“Every day in North America,
an Insight Research project is front page news.”*

INSIGHT RESEARCH CORPORATION

Our Services

*“Every day in North America,
an Insight Research project is front page news.”*

Insight Research Corporation is a dominant competitor in the measurement of economic, employment, and investment grade tax revenue impacts.

The firm has special depth in freight and passenger transportation, traditional and high-tech manufacturing. Insight Research Corporation also provides specific services for the needs of fast-growing municipalities.

Economic Analysis Services:

- Economic, Employment, and Tax Revenue Impact Analysis
 - Investment-Grade Tax Revenue Projections
 - Project Cost/Benefit Analysis
- Development Simulation Modeling of Land Use Alternatives
- Impact of Transportation Design Alternatives
- The ROAN Report® of Retail Opportunity
- The “FAST TRAKKER” Cost/Benefit Analysis
- The Final Decision Model

All analytical services provided by Insight Research Corporation are confidential and are custom-designed to address the specific needs of each client.



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INSIGHT RESEARCH CORPORATION
Economic Impact Analysis
**A Multi-Jurisdictional Analysis of Economic,
Employment and Tax Revenue Impact**

In a clearly stated, color illustrated format, an Economic Impact Analysis answers the question:

“What will the proposed facility, project, move or expansion mean to the target community in jobs, new dollars in the economy and tax revenues over time?”

Insight Research Corporation has refined an economic analysis protocol to evaluate the detailed economic, employment and tax impacts of public and private capital investments, major projects and business site locations and expansions. Insight Research Corporation’s approach employs the methodologies of the US Bureau of Economic Analysis and the Bureau of Canadian Statistics, the “gold standards” of economic analysis in the United States and Canada respectively.

While economic impact is highly quantifiable and uses traditional methodologies, measuring direct and indirect tax impact is a technical breakthrough in applied microeconomics. This analytical system has many successful applications for a wide variety of projects in the United States and Canada.

Benefits of the economic impact protocol can include investment-grade tax revenue forecasts for public and/or private financing and cost/benefit analysis as needed.

For further information about your Economic Impact Analysis needs, please contact::

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Email: theteam@getinsight.com

Insight Research Corporation
Development Simulation Modeling for Local Government

Development Simulation Modeling (DSM) is a highly accurate new method of financial forecasting. It allows modeling of a community's future growth and land use under different development scenarios while simultaneously estimating the financial impacts to the jurisdiction of each scenario.

DSM modeling provides for short and long term, risk-free examination of future zoning, annexation, community and economic development alternatives, helping to answer the key question, **"Can our city afford its future?"**

Some of the issues in which the DSM has been valuable include:

- Defining the optimum balance of residential to commercial tax base
- Examining the city's future operating and capital needs under current development trends
- Testing alternative land use and public management strategies to achieve a more favorable outcome

Development Simulation Modeling provides statistical support to elected officials and municipal professionals as they examine municipal issues including:

- Forecasting community growth under alternative hypothetical scenarios
- Testing many different opinions and options in a risk-free environment, using variable assumptions
- Examining the tax revenue balance produced from different types of residential and commercial development
- Facilitating consensus on community goals

For further information about your community's
Development Simulation Modeling needs, please contact:

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Dallas, TX 75243
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INSIGHT RESEARCH CORPORATION

Transportation Impact Analysis

A Multi-Jurisdictional Analysis of Economic, Employment, Tax Revenue and Cost/Benefit Impact for Transportation Projects

Insight Research Corporation has recognized expertise in quantifying the effects of transportation projects including freight and passenger rail, bridge and overpass placement, airport and seaport improvements. Using federal methodologies and its proprietary databases of design, construction and operating budgets, Insight Research augments the required socioeconomic and environmental analyses to help achieve the following results:

- Quantify the economic, employment and fiscal impact of highway design alternatives
- Build public understanding of the value of these major public and private investments
- Assist the jurisdiction in placing bonds and obtaining right-of-way

Insight Research Corporation's advanced modeling capacity captures not only the often cited economic and employment impacts of public design and construction expenditures, but also includes the **direct and indirect tax impacts by specific jurisdiction** of the following transportation project phases:

- Design and Construction Investments for Alignment Alternatives
- Right-of-Way Purchase and Reinvestment
- Estimates of Adjacent Private Development Potential
- Construction Phase Business Interruption Losses
- Business Activity Gains Due to Improved Access and Visibility
- Impacts of Toll versus Non-Toll Alternatives
- Lost Opportunity Impacts of "No Action"
- Environmental Impacts
- Environmental Justice Issues

For further information about Transportation Impact Analysis, please contact::

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INSIGHT RESEARCH CORPORATION

The ROAN Report[®], “A Diagnostic Analysis of Retail Opportunity”

The ROAN Report[®] is a breakthrough in retail analysis which measures the disparity between retail supply and demand in virtually any custom-designated geographic trade area in the United States or its territories. This diagnostic analysis is designed to answer the questions:

“What retail use will be most profitable on this site?” or
“What is the unmet demand for certain goods and services at this site?”

The Roan Report[®] has been developed and tested in an applied research environment, and has been refined, calibrated and used by Insight Research Corporation’s clients in hundreds of retail site evaluations throughout the United States.

This analytical approach adds significant value by reducing retail risk and revealing current unmet retail demand across fifteen retail categories. The ROAN Report[®] is unique to the retail industry because, for the first time, both supply and demand information are provided in one cost-effective, timely and completely custom analysis. Included in this report is the following information:

- Quantification of New or Unmet Retail Potential
- Supportable Retail Square Footage
- Sales Tax Revenue Potential
- Market Share Analysis
- Identification of Retail Needs Currently Met
- Population and Income Trends in the Study Area
- Quantification of Added Retail Jobs

For further information about The ROAN Report[®], please contact:

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INSIGHT RESEARCH CORPORATION
“The FAST TRAKKER – A Cost/Benefit Analysis Breakthrough”

Two of the most controversial questions facing communities are:

- A. “What kind of incentives can we afford to offer to desirable new businesses?”**
- B. “When can we expect to get our investment back?”**

Insight Research’s **FAST TRAKKER** is designed to be used in-house by city or economic development staff. **FAST TRAKKER** reports quickly and accurately compute the cost-to-benefit relationship of a proposed project. Reports provide succinct, consistent results, illustrated by colorful graphics. Fully customized for each project, the **FAST TRAKKER** allows a jurisdiction to test multiple cost options against the potential benefits, addressing the following issues:

Costs:

- Public service cost
- A full range of incentives, abatements, grants, rebates, infrastructure participation, fee waivers
- Environmental credits
- Special tax exemptions

Benefits:

- New assessed values
- Real and personal property taxes
- Inventory and sales taxes
- Permit and fee generation
- Utility franchise fees
- Land or special use donations

- All financial analyses are prepared by your staff, safeguarding project confidentiality.
- Methodology is tailored for the jurisdiction’s individual tax and incentive structure, as well as for each project opportunity.
- Comparative results improve communications to elected officials and the public.
- Insight Research Corporation provides the friendliest, most knowledgeable support services in the industry are available to assist the user -- by telephone, e-mail or on-site -- including annual user conferences.
- Five models of the **FAST TRAKKER** are available to accommodate project timeframes and financial variables.

For further information about Insight Research Corporation’s
FAST TRAKKER, please contact:

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INSIGHT RESEARCH CORPORATION
The Final List Software
“Score, Weight, Rank and Decide”

Insight Research Corporation specializes in business relocation modeling and analysis. The company provides confidential consulting, research and analytical support for companies of many sizes, particularly those with high growth or specialized labor force concerns.

Business location analysis allows a company to define and quantify its relocation or expansion goals, translating those goals into action. The Final List protocol allows a company to rank location options by defined variables to see which option best corresponds with its stated objectives.

Insight Research Corporation provides its clients with the following:

- A flexible, extensively tested analytical system for all types of business activities: manufacturing, retail, corporate headquarters, data control centers, call and service centers
- On-line, library and data gathering resources for virtually unlimited business information, skillfully refined to assure "apples-to-apples" site comparisons
- Objectivity, experience and confidentiality
- Experience in regionally related cost variations

For further information about comparative business site location analysis, please contact:

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INSIGHT RESEARCH CORPORATION
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Catullus
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Nestle Corporation
PepsiCo Inc.
Pepsico International
Perot Group/Hillwood Dev
Perot Systems Corp.
Raytheon
Rich's Food Products
Roadway Express
Rosewood Properties, Inc.
RTKL, Inc., Architects
SABRE Group
Sandoz Pharmaceutical
Skywalker Development
/Lucas Films
Sogetexas, Inc. (France)
Southland Corporation
Southwestern Bell
Staubach Company
T-Mobile
Texas Industries (TXI)
Texas Instruments Inc.
The Container Store
Torchmark Insurance
Trammell Crow Company
TriCon Global Taco Bell,
KFC, Pizza Hut
Visa International
Westinghouse
Woodbine Development
Xerox Realty Corporation

PROFESSIONAL SPORTS

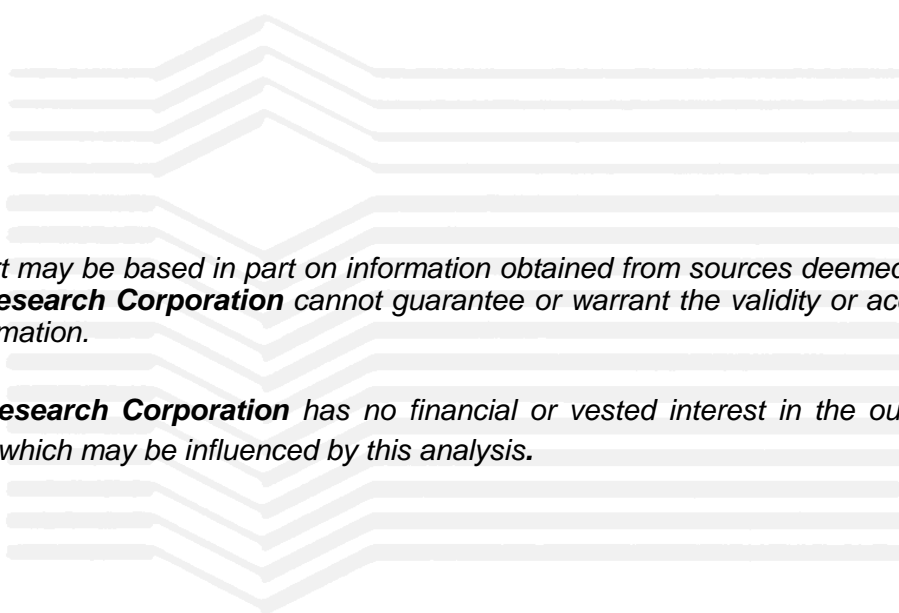
Dallas Stars (NHL)
Ft Worth Motor Speedway
Lone Star Park-Breeders
Cup
Major League Baseball
(MLB)
National Basketball
Association (NBA)
National Football League
(NFL)
San Antonio Spurs (NBA)
St Louis Rams (NFL)
Stafford Sports

TRANSPORTATION

Airbus
Alliance Airport
BNSF Railroad
CSX Intermodal
CSX Railroad
CSX Transportation, Inc.
D/FW International Airport
Dallas Area Rapid Transit
(DART)
Daimler-Chrysler
Dulles International Airport
Fed Ex
Federal Express Ground
LSTransit
North Central Texas
Council of Governments
North Texas Tollway
Authority
Pacer Stacktrain
TX Dept of Transportation
Union Pacific Railroad
Wilbur Smith Associates

NON-PROFITS

Arts of Collin County
Baptist General Conv.
Greater Dallas Chamber
Home and Apartment
Builders Association
Lutheran Brotherhood
OK City Chamber
Presbyterian Foundation
Sci-Tech Discovery Center
YMCA



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