



RETAIL GAP ANALYSIS

Broadway Submarket Retail Trade Area

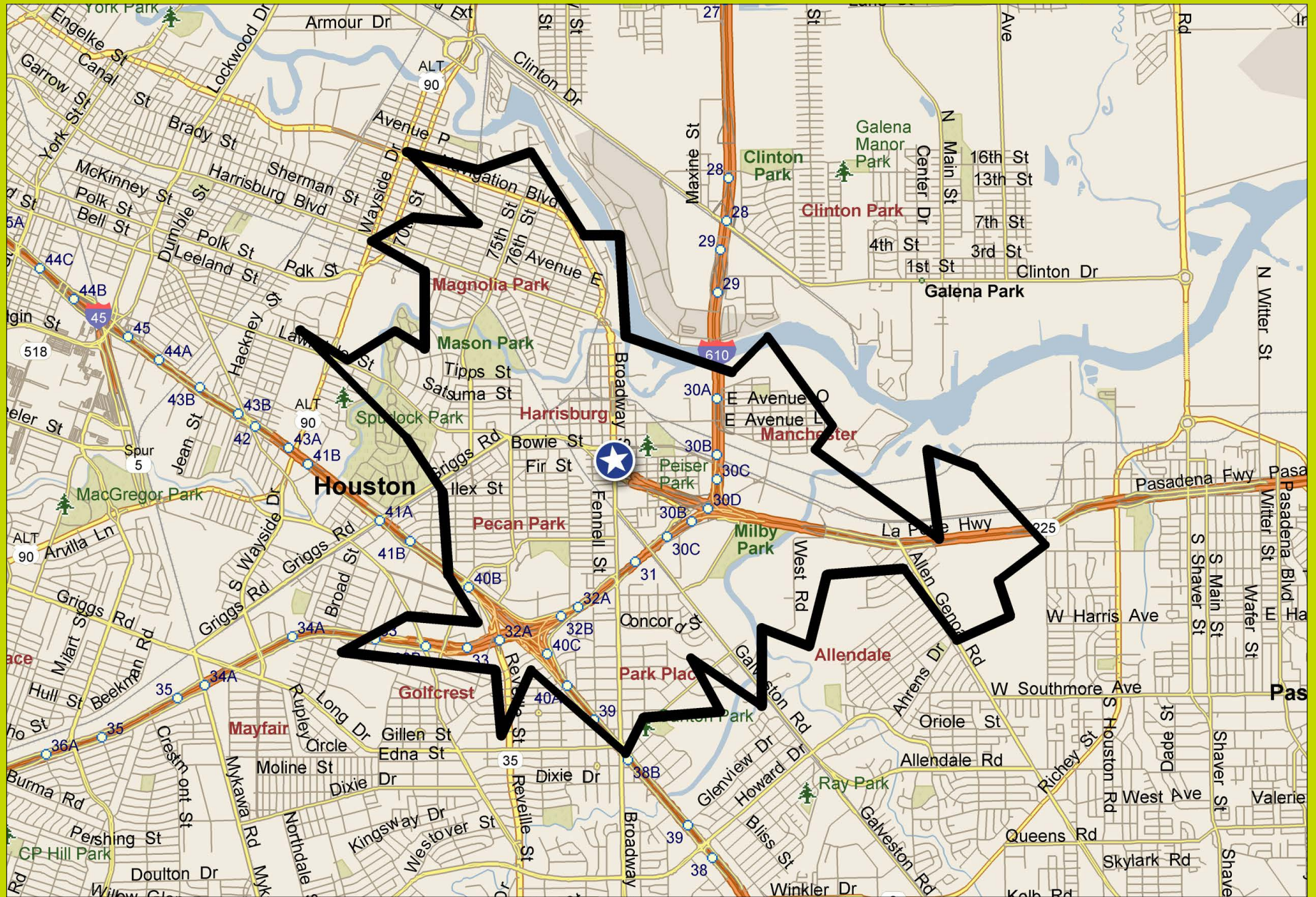
Houston, Texas

May 2013



BROADWAY SUBMARKET RETAIL TRADE AREA MAP

Houston, Texas



BROADWAY SUBMARKET RETAIL TRADE AREA RETAIL GAP ANALYSIS SUMMARY TABLE

Houston, Texas

SIC	RETAIL SECTOR	POTENTIAL SALES	EST. ACTUAL SALES	SURPLUS/LEAKAGE	% SURPLUS
521	Lumber and Other Building Materials	\$7,397,534	\$0	-\$7,397,534	-100%
523	Paint, Glass and Wallpaper	\$2,226,245	\$3,500,000	\$1,273,755	57%
525	Hardware Stores	\$4,343,843	\$0	-\$4,343,843	-100%
526	Retail Nurseries and Garden	\$2,432,773	\$0	-\$2,432,773	-100%
527	Mobile Home Dealers	\$815,967	\$0	-\$815,967	-100%
53	General Merchandise Stores	\$27,617,130	\$1,500,000	-\$26,117,130	-95%
541	Grocery Stores	\$31,593,930	\$3,600,000	-\$27,993,930	-89%
542	Meat and Fish Markets	\$1,004,342	\$0	-\$1,004,342	-100%
543	Fruit and Vegetable Markets	\$614,689	\$0	-\$614,689	-100%
544	Candy, Nut and Confection Stores	\$104,376	\$0	-\$104,376	-100%
545	Dairy Products Stores	\$53,211	\$0	-\$53,211	-100%
546	Retail Bakeries	\$378,085	\$0	-\$378,085	-100%
549	Miscellaneous Food Stores	\$2,155,327	\$0	-\$2,155,327	-100%
551	New and Used Car Dealers	\$38,679,220	\$0	-\$38,679,220	-100%
552	Used Car Dealers	\$7,029,771	\$8,900,000	\$1,870,230	27%
553	Auto and Home Supply Stores	\$9,261,711	\$9,500,000	\$238,289	3%
554	Gasoline Service Stations	\$8,490,057	\$1,400,000	-\$7,090,057	-84%
555	Boat Dealers	\$795,768	\$0	-\$795,768	-100%
556	Recreational Vehicle Dealers	\$1,268,174	\$0	-\$1,268,174	-100%
557	Motorcycle Dealers	\$1,119,930	\$0	-\$1,119,930	-100%
559	Automotive Dealers, NEC	\$1,835,258	\$0	-\$1,835,258	-100%
561	Men's and Boys' Clothing Stores	\$627,591	\$0	-\$627,591	-100%
562	Women's Clothing Stores	\$1,206,154	\$300,000	-\$906,154	-75%
563	Women's Accessory and Specialty Stores	\$175,740	\$0	-\$175,740	-100%
564	Children's and Infants' Wear	\$311,349	\$200,000	-\$111,349	-36%
565	Family Clothing Stores	\$1,379,936	\$400,000	-\$979,936	-71%
566	Shoe Stores	\$1,593,493	\$2,000,000	\$406,507	26%
569	Miscellaneous Apparel and Accessory Stores	\$782,509	\$0	-\$782,509	-100%
571	Home Furniture and Furnishing	\$6,882,683	\$200,000	-\$6,682,683	-97%
572	Household Appliance Stores	\$1,479,329	\$0	-\$1,479,329	-100%
573	Radio, TV, and Computer Stores	\$16,248,770	\$1,400,000	-\$14,848,770	-91%
5812	Eating Places	\$35,878,680	\$15,000,000	-\$20,878,680	-58%

BROADWAY SUBMARKET RETAIL TRADE AREA RETAIL GAP ANALYSIS SUMMARY TABLE

Houston, Texas

SIC	RETAIL SECTOR	POTENTIAL SALES	EST. ACTUAL SALES	SURPLUS/LEAKAGE	% SURPLUS
5813	Drinking Places	\$1,077,218	\$400,000	-\$677,218	-63%
591	Drug Stores and Proprietary	\$6,900,925	\$4,600,000	-\$2,300,924	-33%
592	Liquor Stores	\$687,654	\$400,000	-\$287,654	-42%
593	Used Merchandise Stores	\$1,421,757	\$1,400,000	-\$21,757	-2%
5941	Sporting Goods, Bicycle and Gun Stores	\$1,204,997	\$0	-\$1,204,997	-100%
5942	Book Stores	\$516,809	\$0	-\$516,809	-100%
5943	Stationery Stores	\$1,790,500	\$0	-\$1,790,500	-100%
5944	Jewelry Stores	\$837,055	\$0	-\$837,055	-100%
5945	Hobby, Toy and Game Shops	\$938,139	\$0	-\$938,139	-100%
5946	Camera and Photography Supply Stores	\$67,448	\$0	-\$67,448	-100%
5947	Gift, Novelty and Souvenir Shops	\$1,085,405	\$200,000	-\$885,405	-82%
5948	Luggage and Leather Goods Stores	\$42,533	\$0	-\$42,533	-100%
5949	Sewing, Needlework and Craft Stores	\$128,134	\$0	-\$128,134	-100%
596	Non-store Retailers	\$2,672,669	\$0	-\$2,672,669	-100%
598	Fuel and Ice Dealers	\$224,146	\$0	-\$224,146	-100%
5992	Florists	\$551,067	\$0	-\$551,067	-100%
5993	Tobacco Stores and Stands	\$118,435	\$0	-\$118,435	-100%
5994	News Dealers and Newsstands	\$81,241	\$0	-\$81,241	-100%
5995	Optical Goods Stores	\$661,405	\$0	-\$661,405	-100%
5999	Miscellaneous Retail Stores, NEC	\$9,721,837	\$400,000	-\$9,321,837	-96%
	TOTALS	\$246,513,000	\$55,300,000	-\$191,213,000	LEAKAGE

BROADWAY SUBMARKET RETAIL TRADE AREA DEMOGRAPHICS

Houston, Texas

DESCRIPTION	DATA	%
Population		
2018 Projection	48,034	
2013 Estimate	46,049	
2010 Census	45,196	
2000 Census	50,594	
Growth 2013-2018	4.31%	
Growth 2010-2013	1.89%	
Growth 2000-2010	-10.67%	
2013 Est. Pop by Single Race Class	46,049	
White Alone	30,133	65.44
Black or African American Alone	1,261	2.74
Amer. Indian and Alaska Native Alone	424	0.92
Asian Alone	954	2.07
Native Hawaiian and Other Pac. Isl. Alone	8	0.02
Some Other Race Alone	11,560	25.10
Two or More Races	1,710	3.71
2013 Est. Pop Hisp or Latino by Origin	46,049	
Not Hispanic or Latino	3,878	8.42
Hispanic or Latino:	42,171	91.58
Mexican	37,826	89.70
Puerto Rican	108	0.26
Cuban	7	0.02
All Other Hispanic or Latino	4,230	10.03

DESCRIPTION	DATA	%
2013 Est. Hisp or Latino by Single Race Class	42,171	
White Alone	28,404	67.35
Black or African American Alone	269	0.64
American Indian and Alaska Native Alone	364	0.86
Asian Alone	29	0.07
Native Hawaiian and Other Pacific Islander Alone	3	0.01
Some Other Race Alone	11,496	27.26
Two or More Races	1,606	3.81
2013 Est. Pop. Asian Alone Race by Cat	954	
Chinese, except Taiwanese	5	0.52
Filipino	78	8.18
Japanese	3	0.31
Asian Indian	24	2.52
Korean	9	0.94
Vietnamese	790	82.81
Cambodian	4	0.42
Hmong	0	0.00
Laotian	4	0.42
Thai	3	0.31
All Other Asian Races Including 2+ Category	33	3.46

BROADWAY SUBMARKET RETAIL TRADE AREA DEMOGRAPHICS

Houston, Texas

DESCRIPTION	DATA	%
2013 Est. Population by Ancestry	46,049	
Pop, Arab	18	0.04
Pop, Czech	23	0.05
Pop, Danish	0	0.00
Pop, Dutch	7	0.02
Pop, English	129	0.28
Pop, French (except Basque)	88	0.19
Pop, French Canadian	33	0.07
Pop, German	261	0.57
Pop, Greek	0	0.00
Pop, Hungarian	0	0.00
Pop, Irish	131	0.28
Pop, Italian	57	0.12
Pop, Lithuanian	0	0.00
Pop, United States or American	683	1.48
Pop, Norwegian	1	0.00
Pop, Polish	27	0.06
Pop, Portuguese	0	0.00
Pop, Russian	0	0.00
Pop, Scottish	51	0.11
Pop, Scotch-Irish	10	0.02
Pop, Slovak	0	0.00
Pop, Sub-Saharan African	26	0.06
Pop, Swedish	0	0.00
Pop, Swiss	0	0.00
Pop, Ukrainian	0	0.00
Pop, Welsh	0	0.00
Pop, West Indian (exc Hisp groups)	8	0.02
Pop, Other ancestries	42,645	92.61
Pop, Ancestry Unclassified	1,851	4.02

DESCRIPTION	DATA	%
2013 Est. Pop Age 5+ by Language Spoken At Home	41,553	
Speak Only English at Home	5,252	12.64
Speak Asian/Pac. Isl. Lang. at Home	1,047	2.52
Speak Indo-European Language at Home	170	0.41
Speak Spanish at Home	35,080	84.42
Speak Other Language at Home	3	0.01
2013 Est. Population by Sex	46,049	
Male	23,990	52.10
Female	22,059	47.90
2013 Est. Population by Age	46,049	
Age 0 - 4	4,496	9.76
Age 5 - 9	3,966	8.61
Age 10 - 14	3,635	7.89
Age 15 - 17	2,074	4.50
Age 18 - 20	2,206	4.79
Age 21 - 24	2,957	6.42
Age 25 - 34	7,073	15.36
Age 35 - 44	6,358	13.81
Age 45 - 54	5,449	11.83
Age 55 - 64	4,171	9.06
Age 65 - 74	2,198	4.77
Age 75 - 84	1,079	2.34
Age 85 and over	387	0.84
Age 16 and over	33,282	72.28
Age 18 and over	31,877	69.22
Age 21 and over	29,671	64.43
Age 65 and over	3,663	7.95
2013 Est. Median Age	30.2	
2013 Est. Average Age	32.40	

BROADWAY SUBMARKET RETAIL TRADE AREA DEMOGRAPHICS

Houston, Texas

DESCRIPTION	DATA	%
2013 Est. Male Population by Age	23,990	
Age 0 - 4	2,245	9.36
Age 5 - 9	2,100	8.75
Age 10 - 14	1,888	7.87
Age 15 - 17	1,050	4.38
Age 18 - 20	1,137	4.74
Age 21 - 24	1,598	6.66
Age 25 - 34	3,891	16.22
Age 35 - 44	3,407	14.20
Age 45 - 54	2,864	11.94
Age 55 - 64	2,162	9.01
Age 65 - 74	1,069	4.46
Age 75 - 84	456	1.90
Age 85 and over	124	0.52
2013 Est. Median Age, Male	30.1	
2013 Est. Average Age, Male	32.00	
2013 Est. Female Population by Age	22,059	
Age 0 - 4	2,251	10.20
Age 5 - 9	1,866	8.46
Age 10 - 14	1,747	7.92
Age 15 - 17	1,024	4.64
Age 18 - 20	1,069	4.85
Age 21 - 24	1,359	6.16
Age 25 - 34	3,182	14.42
Age 35 - 44	2,951	13.38
Age 45 - 54	2,585	11.72
Age 55 - 64	2,010	9.11
Age 65 - 74	1,129	5.12
Age 75 - 84	623	2.82
Age 85 and over	263	1.19

DESCRIPTION	DATA	%
2013 Est. Median Age, Female	30.4	
2013 Est. Average Age, Female	32.80	
2013 Est. Pop Age 15+ by Marital Status	33,952	
Total, Never Married	12,429	36.61
Males, Never Married	7,260	21.38
Females, Never Married	5,169	15.22
Married, Spouse present	13,096	38.57
Married, Spouse absent	4,250	12.52
Widowed	1,676	4.94
Males Widowed	432	1.27
Females Widowed	1,244	3.66
Divorced	2,501	7.37
Males Divorced	1,177	3.47
Females Divorced	1,325	3.90
2013 Est. Pop. Age 25+ by Edu. Attainment	26,714	
Less than 9th grade	9,932	37.18
Some High School, no diploma	4,613	17.27
High School Graduate (or GED)	6,873	25.73
Some College, no degree	3,310	12.39
Associate Degree	467	1.75
Bachelor's Degree	1,010	3.78
Master's Degree	333	1.25
Professional School Degree	123	0.46
Doctorate Degree	55	0.21
2013 Est Pop Age 25+ by Edu. Attain, Hisp. or Lat	23,815	
CY Pop 25+, Hisp/Lat, Less Than High School Diploma	13,339	56.01
CY Pop 25+, Hisp/Lat, High School Graduate	6,146	25.81
CY Pop 25+, Hisp/Lat, Some College or Associate's Degree	3,320	13.94
CY Pop 25+, Hisp/Lat, Bachelor's Degree or Higher	1,010	4.24

BROADWAY SUBMARKET RETAIL TRADE AREA DEMOGRAPHICS

Houston, Texas

DESCRIPTION	DATA	%
Households		
2018 Projection	14,516	
2013 Estimate	13,785	
2010 Census	13,377	
2000 Census	13,901	
Growth 2013-2018	5.30%	
Growth 2010-2013	3.05%	
Growth 2000-2010	-3.77%	
2013 Est. Households by Household Type	13,785	
Family Households	10,242	74.30
Nonfamily Households	3,543	25.70
2013 Est. Group Quarters Population	208	
2013 HHs by Ethnicity, Hispanic/Latino	12,042	87.36
2013 Est. HHs by HH Income	13,785	
CY HHs, Inc Less Than \$15,000	2,805	20.35
CY HHs, Inc \$15,000 - \$24,999	2,841	20.61
CY HHs, Inc \$25,000 - \$34,999	2,418	17.54
CY HHs, Inc \$35,000 - \$49,999	2,343	17.00
CY HHs, Inc \$50,000 - \$74,999	1,778	12.90
CY HHs, Inc \$75,000 - \$99,999	880	6.38
CY HHs, Inc \$100,000 - \$124,999	382	2.77
CY HHs, Inc \$125,000 - \$149,999	194	1.41
CY HHs, Inc \$150,000 - \$199,999	92	0.67
CY HHs, Inc \$200,000 - \$249,999	26	0.19
CY HHs, Inc \$250,000 - \$499,999	23	0.17
CY HHs, Inc \$500,000+	3	0.02

DESCRIPTION	DATA	%
2013 Est. Average Household Income	\$39,086	
2013 Est. Median Household Income	\$30,156	
2012 Est. Per Capita Income	\$11,855	
2013 Median HH Inc by Single Race Class. or Ethn		
White Alone	29,898	
Black or African American Alone	24,856	
American Indian and Alaska Native Alone	46,921	
Asian Alone	35,325	
Native Hawaiian and Other Pacific Islander Alone	21,044	
Some Other Race Alone	30,549	
Two or More Races	27,975	
Hispanic or Latino	30,185	
Not Hispanic or Latino	29,911	
2013 Est. Family HH Type, Presence Own Children	10,242	
Married-Couple Family, own children	3,788	36.98
Married-Couple Family, no own children	2,680	26.17
Male Householder, own children	573	5.59
Male Householder, no own children	934	9.12
Female Householder, own children	1,185	11.57
Female Householder, no own children	1,081	10.55

BROADWAY SUBMARKET RETAIL TRADE AREA DEMOGRAPHICS

Houston, Texas

DESCRIPTION	DATA	%
2013 Est. Households by Household Size	13,785	
1-person household	2,756	19.99
2-person household	2,889	20.96
3-person household	2,334	16.93
4-person household	2,236	16.22
5-person household	1,712	12.42
6-person household	996	7.23
7 or more person household	862	6.25
2013 Est. Average Household Size	3.33	
2013 Est. Households by Presence of People	13,785	
Households with 1 or more People under Age 18:	6,504	47.18
Married-Couple Family	4,219	64.87
Other Family, Male Householder	727	11.18
Other Family, Female Householder	1,513	23.26
Nonfamily, Male Householder	42	0.65
Nonfamily, Female Householder	2	0.03
Households no People under Age 18:	7,281	52.82
Married-Couple Family	2,392	32.85
Other Family, Male Householder	806	11.07
Other Family, Female Householder	814	11.18
Nonfamily, Male Householder	2,028	27.85
Nonfamily, Female Householder	1,240	17.03

DESCRIPTION	DATA	%
2013 Est. Households by Number of Vehicles	13,785	
No Vehicles	2,128	15.44
1 Vehicle	5,190	37.65
2 Vehicles	4,316	31.31
3 Vehicles	1,646	11.94
4 Vehicles	359	2.60
5 or more Vehicles	146	1.06
2013 Est. Average Number of Vehicles	2	
Family Households		
2018 Projection	10,772	
2013 Estimate	10,242	
2010 Census	9,946	
2000 Census	11,085	
Growth 2013-2018	5.17%	
Growth 2010-2013	2.98%	
Growth 2000-2010	-10.28%	
2013 Est. Families by Poverty Status	10,242	
2013 Families at or Above Poverty	7,506	73.29
2013 Families at or Above Poverty with Children	4,090	39.93
2013 Families Below Poverty	2,736	26.71
2013 Families Below Poverty with Children	2,311	22.56
2013 Est. Pop Age 16+ by Employment Status	33,282	
In Armed Forces	0	0.00
Civilian - Employed	18,973	57.01
Civilian - Unemployed	2,443	7.34
Not in Labor Force	11,867	35.66

BROADWAY SUBMARKET RETAIL TRADE AREA DEMOGRAPHICS

Houston, Texas

DESCRIPTION	DATA	%
2013 Est. Civ Employed Pop 16+ Class of Worker	19,676	
For-Profit Private Workers	16,071	81.68
Non-Profit Private Workers	433	2.20
Local Government Workers	747	3.80
State Government Workers	505	2.57
Federal Government Workers	143	0.73
Self-Emp Workers	1,760	8.94
Unpaid Family Workers	16	0.08
2013 Est. Civ Employed Pop 16+ by Occupation	19,676	
Architect/Engineer	118	0.60
Arts/Entertain/Sports	146	0.74
Building Grounds Maint	1,615	8.21
Business/Financial Ops	172	0.87
Community/Soc Svcs	60	0.30
Computer/Mathematical	87	0.44
Construction/Extraction	4,549	23.12
Edu/Training/Library	414	2.10
Farm/Fish/Forestry	203	1.03
Food Prep/Serving	1,628	8.27
Health Practitioner/Tec	291	1.48
Healthcare Support	333	1.69
Maintenance Repair	863	4.39
Legal	34	0.17
Life/Phys/Soc Science	63	0.32
Management	364	1.85
Office/Admin Support	1,890	9.61
Production	2,421	12.30
Protective Svcs	160	0.81
Sales/Related	1,673	8.50
Personal Care/Svc	406	2.06
Transportation/Moving	2,185	11.10

DESCRIPTION	DATA	%
2013 Est. Pop 16+ by Occupation Classification	19,676	
Blue Collar	10,018	50.91
White Collar	5,312	27.00
Service and Farm	4,346	22.09
2013 Est. Workers Age 16+, Transp. To Work	19,222	
Drove Alone	11,834	61.56
Car Pooled	4,826	25.11
Public Transportation	1,026	5.34
Walked	647	3.37
Bicycle	72	0.37
Other Means	466	2.42
Worked at Home	350	1.82
2013 Est. Workers Age 16+ by Travel Time to Work *		
Less than 15 Minutes	3,842	
15 - 29 Minutes	6,535	
30 - 44 Minutes	4,946	
45 - 59 Minutes	1,300	
60 or more Minutes	2,260	
2013 Est. Avg Travel Time to Work in Minutes	31.68	
2013 Est. Tenure of Occupied Housing Units	13,785	
Owner Occupied	5,884	42.68
Renter Occupied	7,900	57.31
2013 Owner Occ. HUs: Avg. Length of Residence	22.4	
2013 Renter Occ. HUs: Avg. Length of Residence	7.2	

BROADWAY SUBMARKET RETAIL TRADE AREA DEMOGRAPHICS

Houston, Texas

DESCRIPTION	DATA	%
2013 Est. All Owner-Occupied Housing Values	5,884	
Value Less than \$20,000	130	2.21
Value \$20,000 - \$39,999	179	3.04
Value \$40,000 - \$59,999	630	10.71
Value \$60,000 - \$79,999	1,687	28.67
Value \$80,000 - \$99,999	1,932	32.83
Value \$100,000 - \$149,999	927	15.75
Value \$150,000 - \$199,999	252	4.28
Value \$200,000 - \$299,999	94	1.60
Value \$300,000 - \$399,999	52	0.88
Value \$400,000 - \$499,999	1	0.02
Value \$500,000 - \$749,999	0	0.00
Value \$750,000 - \$999,999	0	0.00
Value \$1,000,000 or more	0	0.00
2013 Est. Median All Owner-Occupied Housing Value	\$83,269	
2013 Est. Housing Units by Units in Structure	15,828	
1 Unit Attached	570	3.60
1 Unit Detached	8,796	55.57
2 Units	1,169	7.39
3 or 4 Units	1,027	6.49
5 to 19 Units	2,324	14.68
20 to 49 Units	1,126	7.11
50 or More Units	686	4.33
Mobile Home or Trailer	129	0.82
Boat, RV, Van, etc.	2	0.01

DESCRIPTION	DATA	%
2013 Est. Housing Units by Year Structure Built	15,828	
Housing Unit Built 2005 or later	469	2.96
Housing Unit Built 2000 to 2004	529	3.34
Housing Unit Built 1990 to 1999	731	4.62
Housing Unit Built 1980 to 1989	1,275	8.06
Housing Unit Built 1970 to 1979	2,391	15.11
Housing Unit Built 1960 to 1969	2,102	13.28
Housing Unit Built 1950 to 1959	3,336	21.08
Housing Unit Built 1940 to 1949	2,881	18.20
Housing Unit Built 1939 or Earlier	2,113	13.35
2013 Est. Median Year Structure Built	1959	



C. Kelly Cofer
President & CEO
The Retail Coach, LLC

About The Retail Coach

The Retail Coach, LLC, is a national retail analytics and locational intelligence firm that specializes in all aspects of retail market analyses and recruitment, from “macro to micro” trade area assessment to actively recruiting retailers on behalf of our clients.

Through its unique Retail:360 process, The Retail Coach offers a dynamic system of products and services that better enable communities to maximize their retail development potential.

Retail:360 Process

Providing more than simple data reports of psychographic and demographic trends, The Retail Coach goes well beyond other retail consulting and market research firms’ offerings by combining current national and statewide demographics and trend data with real-world, “on-the-ground” data gathered through extensive visits within our clients’ communities.

Every community is different, and there is no “one size fits all” retail recruitment solution. Compiling the gathered data into client-tailored information packets that are uniquely designed for, and targeted to, specific retailers and restaurants who meet the community’s needs helps assure our clients that they are receiving the latest and best information for their retail recruitment efforts — all with personal service and coaching guidance that continues beyond the initial project scope and timeline.

Our Retail:360 process assures that communities get timely, accurate and relevant information. Translating that data into the information that retailers need and seek assures our clients even better possibilities for tremendous retail growth and success.

**The Retail Coach -
It’s not about data. It’s about your success.**

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Acknowledgements

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Sources used in completing this study include: infoUSA™, Applied Geographic Solutions, Nielsen 2012/2013, ESRI 2011/2012, U.S. Census Bureau, Economy.com, International Council of Shopping Centers, and/or U.S. Bureau of Labor and Statistics.

To better represent current data, where applicable, portions of estimated actual sales may be calculated using an average sales per square foot model.

Mapping data is provided by MapInfo, Nielsen, ESRI and/or Microsoft Corporation.

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