



# RETAIL GAP ANALYSIS

## Harrisburg Submarket Retail Trade Area

### Houston, Texas

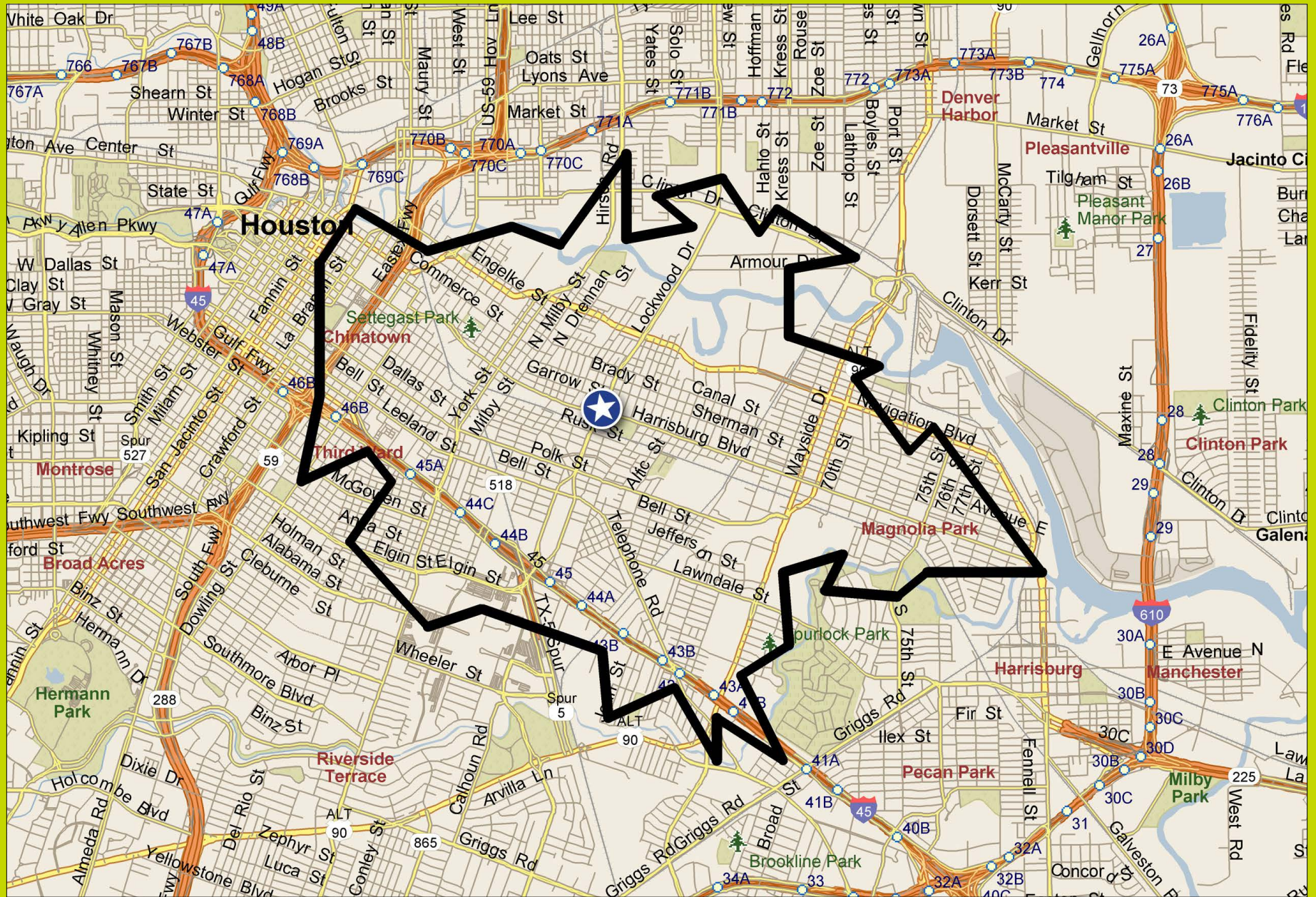
*May 2013*





# HARRISBURG SUBMARKET RETAIL TRADE AREA MAP

## Houston, Texas





# HARRISBURG 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	\$9,663,966	\$0	-\$9,663,966	-100%
523	Paint, Glass and Wallpaper	\$2,908,315	\$2,000,000	-\$908,315	-31%
525	Hardware Stores	\$5,674,696	\$0	-\$5,674,696	-100%
526	Retail Nurseries and Garden	\$3,178,118	\$0	-\$3,178,118	-100%
527	Mobile Home Dealers	\$1,065,960	\$0	-\$1,065,960	-100%
53	General Merchandise Stores	\$36,078,380	\$5,000,000	-\$31,078,380	-86%
541	Grocery Stores	\$41,273,570	\$12,800,000	-\$28,473,570	-69%
542	Meat and Fish Markets	\$1,312,049	\$0	-\$1,312,049	-100%
543	Fruit and Vegetable Markets	\$803,015	\$0	-\$803,015	-100%
544	Candy, Nut and Confection Stores	\$136,355	\$0	-\$136,355	-100%
545	Dairy Products Stores	\$69,514	\$0	-\$69,514	-100%
546	Retail Bakeries	\$493,922	\$0	-\$493,922	-100%
549	Miscellaneous Food Stores	\$2,815,668	\$700,000	-\$2,115,668	-75%
551	New and Used Car Dealers	\$50,529,630	\$0	-\$50,529,630	-100%
552	Used Car Dealers	\$9,183,528	\$4,000,000	-\$5,183,528	-56%
553	Auto and Home Supply Stores	\$12,099,280	\$500,000	-\$11,599,280	-96%
554	Gasoline Service Stations	\$11,091,210	\$7,000,000	-\$4,091,213	-37%
555	Boat Dealers	\$1,039,572	\$0	-\$1,039,572	-100%
556	Recreational Vehicle Dealers	\$1,656,713	\$0	-\$1,656,713	-100%
557	Motorcycle Dealers	\$1,463,050	\$0	-\$1,463,050	-100%
559	Automotive Dealers, NEC	\$2,397,538	\$0	-\$2,397,538	-100%
561	Men's and Boys' Clothing Stores	\$819,871	\$0	-\$819,871	-100%
562	Women's Clothing Stores	\$1,575,691	\$200,000	-\$1,375,691	-87%
563	Women's Accessory and Specialty Stores	\$229,582	\$0	-\$229,582	-100%
564	Children's and Infants' Wear	\$406,739	\$0	-\$406,739	-100%
565	Family Clothing Stores	\$1,802,716	\$0	-\$1,802,716	-100%
566	Shoe Stores	\$2,081,702	\$0	-\$2,081,702	-100%
569	Miscellaneous Apparel and Accessory Stores	\$1,022,252	\$0	-\$1,022,252	-100%
571	Home Furniture and Furnishing	\$8,991,376	\$500,000	-\$8,491,376	-94%
572	Household Appliance Stores	\$1,932,561	\$0	-\$1,932,561	-100%
573	Radio, TV, and Computer Stores	\$21,227,010	\$0	-\$21,227,010	-100%
5812	Eating Places	\$46,871,080	\$8,000,000	-\$38,871,080	-83%

# HARRISBURG 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	\$1,407,253	\$400,000	-\$1,007,253	-72%
591	Drug Stores and Proprietary	\$9,015,207	\$4,500,000	-\$4,515,207	-50%
592	Liquor Stores	\$898,336	\$0	-\$898,336	-100%
593	Used Merchandise Stores	\$1,857,351	\$0	-\$1,857,351	-100%
5941	Sporting Goods, Bicycle and Gun Stores	\$1,574,180	\$200,000	-\$1,374,180	-87%
5942	Book Stores	\$675,147	\$0	-\$675,147	-100%
5943	Stationery Stores	\$2,339,067	\$0	-\$2,339,067	-100%
5944	Jewelry Stores	\$1,093,510	\$200,000	-\$893,510	-82%
5945	Hobby, Toy and Game Shops	\$1,225,563	\$0	-\$1,225,563	-100%
5946	Camera and Photography Supply Stores	\$88,113	\$0	-\$88,113	-100%
5947	Gift, Novelty and Souvenir Shops	\$1,417,947	\$0	-\$1,417,947	-100%
5948	Luggage and Leather Goods Stores	\$55,565	\$0	-\$55,565	-100%
5949	Sewing, Needlework and Craft Stores	\$167,392	\$0	-\$167,392	-100%
596	Non-store Retailers	\$3,491,512	\$0	-\$3,491,512	-100%
598	Fuel and Ice Dealers	\$292,819	\$0	-\$292,819	-100%
5992	Florists	\$719,901	\$0	-\$719,901	-100%
5993	Tobacco Stores and Stands	\$154,721	\$0	-\$154,721	-100%
5994	News Dealers and Newsstands	\$106,131	\$0	-\$106,131	-100%
5995	Optical Goods Stores	\$864,044	\$0	-\$864,044	-100%
5999	Miscellaneous Retail Stores, NEC	\$12,700,380	\$800,000	-\$11,900,380	-94%
	TOTALS	\$322,038,800	\$46,800,000	-\$275,238,800	LEAKAGE

## HARRISBURG SUBMARKET RETAIL TRADE AREA DEMOGRAPHICS

### Houston, Texas

DESCRIPTION	DATA	%
Population		
2018 Projection	54,284	
2013 Estimate	53,445	
2010 Census	53,368	
2000 Census	62,123	
Growth 2013-2018	1.57%	
Growth 2010-2013	0.14%	
Growth 2000-2010	-14.09%	
2013 Est. Pop by Single Race Class	53,445	
White Alone	31,933	59.75
Black or African American Alone	5,593	10.46
Amer. Indian and Alaska Native Alone	463	0.87
Asian Alone	812	1.52
Native Hawaiian and Other Pac. Isl. Alone	34	0.06
Some Other Race Alone	12,779	23.91
Two or More Races	1,831	3.43
2013 Est. Pop Hisp or Latino by Origin	53,445	
Not Hispanic or Latino	12,477	23.35
Hispanic or Latino:	40,968	76.65
Mexican	35,911	87.66
Puerto Rican	89	0.22
Cuban	19	0.05
All Other Hispanic or Latino	4,950	12.08

DESCRIPTION	DATA	%
2013 Est. Hisp or Latino by Single Race Class	40,968	
White Alone	26,248	64.07
Black or African American Alone	305	0.74
American Indian and Alaska Native Alone	376	0.92
Asian Alone	37	0.09
Native Hawaiian and Other Pacific Islander Alone	26	0.06
Some Other Race Alone	12,417	30.31
Two or More Races	1,559	3.81
2013 Est. Pop. Asian Alone Race by Cat	812	
Chinese, except Taiwanese	172	21.18
Filipino	23	2.83
Japanese	22	2.71
Asian Indian	102	12.56
Korean	15	1.85
Vietnamese	344	42.36
Cambodian	40	4.93
Hmong	0	0.00
Laotian	6	0.74
Thai	23	2.83
All Other Asian Races Including 2+ Category	66	8.13

# HARRISBURG SUBMARKET RETAIL TRADE AREA DEMOGRAPHICS

## Houston, Texas

DESCRIPTION	DATA	%
2013 Est. Population by Ancestry	53,445	
Pop, Arab	109	0.20
Pop, Czech	38	0.07
Pop, Danish	12	0.02
Pop, Dutch	46	0.09
Pop, English	397	0.74
Pop, French (except Basque)	306	0.57
Pop, French Canadian	30	0.06
Pop, German	968	1.81
Pop, Greek	12	0.02
Pop, Hungarian	0	0.00
Pop, Irish	543	1.02
Pop, Italian	329	0.62
Pop, Lithuanian	9	0.02
Pop, United States or American	1,118	2.09
Pop, Norwegian	63	0.12
Pop, Polish	125	0.23
Pop, Portuguese	9	0.02
Pop, Russian	52	0.10
Pop, Scottish	109	0.20
Pop, Scotch-Irish	142	0.27
Pop, Slovak	9	0.02
Pop, Sub-Saharan African	321	0.60
Pop, Swedish	69	0.13
Pop, Swiss	6	0.01
Pop, Ukrainian	0	0.00
Pop, Welsh	8	0.01
Pop, West Indian (exc Hisp groups)	36	0.07
Pop, Other ancestries	45,296	84.75
Pop, Ancestry Unclassified	3,282	6.14

DESCRIPTION	DATA	%
2013 Est. Pop Age 5+ by Language Spoken At Home	49,136	
Speak Only English at Home	14,390	29.29
Speak Asian/Pac. Isl. Lang. at Home	452	0.92
Speak IndoEuropean Language at Home	392	0.80
Speak Spanish at Home	33,857	68.90
Speak Other Language at Home	45	0.09
2013 Est. Population by Sex	53,445	
Male	28,570	53.46
Female	24,875	46.54
2013 Est. Population by Age	53,445	
Age 0 - 4	4,309	8.06
Age 5 - 9	3,776	7.07
Age 10 - 14	3,556	6.65
Age 15 - 17	1,999	3.74
Age 18 - 20	2,443	4.57
Age 21 - 24	3,331	6.23
Age 25 - 34	9,089	17.01
Age 35 - 44	7,574	14.17
Age 45 - 54	6,914	12.94
Age 55 - 64	5,605	10.49
Age 65 - 74	2,882	5.39
Age 75 - 84	1,425	2.67
Age 85 and over	541	1.01
Age 16 and over	41,184	77.06
Age 18 and over	39,804	74.48
Age 21 and over	37,361	69.91
Age 65 and over	4,848	9.07
2013 Est. Median Age	33.0	
2013 Est. Average Age	34.80	

# HARRISBURG SUBMARKET RETAIL TRADE AREA DEMOGRAPHICS

## Houston, Texas

DESCRIPTION	DATA	%
2013 Est. Male Population by Age	28,570	
Age 0 - 4	2,174	7.61
Age 5 - 9	1,965	6.88
Age 10 - 14	1,838	6.43
Age 15 - 17	1,019	3.57
Age 18 - 20	1,247	4.36
Age 21 - 24	1,778	6.22
Age 25 - 34	5,113	17.90
Age 35 - 44	4,272	14.95
Age 45 - 54	3,943	13.80
Age 55 - 64	3,052	10.68
Age 65 - 74	1,404	4.91
Age 75 - 84	585	2.05
Age 85 and over	181	0.63
2013 Est. Median Age, Male	33.3	
2013 Est. Average Age, Male	34.60	
2013 Est. Female Population by Age	24,875	
Age 0 - 4	2,135	8.58
Age 5 - 9	1,811	7.28
Age 10 - 14	1,718	6.91
Age 15 - 17	981	3.94
Age 18 - 20	1,196	4.81
Age 21 - 24	1,553	6.24
Age 25 - 34	3,976	15.98
Age 35 - 44	3,303	13.28
Age 45 - 54	2,971	11.94
Age 55 - 64	2,553	10.26
Age 65 - 74	1,478	5.94
Age 75 - 84	840	3.38
Age 85 and over	360	1.45

DESCRIPTION	DATA	%
2013 Est. Median Age, Female	32.7	
2013 Est. Average Age, Female	35.00	
2013 Est. Pop Age 15+ by Marital Status	41,804	
Total, Never Married	16,738	40.04
Males, Never Married	10,088	24.13
Females, Never Married	6,650	15.91
Married, Spouse present	12,883	30.82
Married, Spouse absent	5,444	13.02
Widowed	2,525	6.04
Males Widowed	537	1.28
Females Widowed	1,989	4.76
Divorced	4,213	10.08
Males Divorced	2,088	4.99
Females Divorced	2,125	5.08
2013 Est. Pop. Age 25+ by Edu. Attainment	34,030	
Less than 9th grade	10,154	29.84
Some High School, no diploma	6,248	18.36
High School Graduate (or GED)	8,028	23.59
Some College, no degree	4,732	13.91
Associate Degree	1,061	3.12
Bachelor's Degree	2,347	6.90
Master's Degree	897	2.64
Professional School Degree	373	1.10
Doctorate Degree	190	0.56
2013 Est Pop Age 25+ by Edu. Attain, Hisp. or Lat	24,699	
CY Pop 25+, Hisp/Lat, Less Than High School Diploma	13,664	55.32
CY Pop 25+, Hisp/Lat, High School Graduate	5,608	22.71
CY Pop 25+, Hisp/Lat, Some College or Associate's Degree	3,948	15.98
CY Pop 25+, Hisp/Lat, Bachelor's Degree or Higher	1,479	5.99

# HARRISBURG SUBMARKET RETAIL TRADE AREA DEMOGRAPHICS

## Houston, Texas

DESCRIPTION	DATA	%
Households		
2018 Projection	18,107	
2013 Estimate	17,456	
2010 Census	17,100	
2000 Census	17,132	
Growth 2013-2018	3.73%	
Growth 2010-2013	2.08%	
Growth 2000-2010	-0.19%	
2013 Est. Households by Household Type	17,456	
Family Households	11,017	63.11
Nonfamily Households	6,440	36.89
2013 Est. Group Quarters Population	3,543	
2013 HHs by Ethnicity, Hispanic/Latino	12,180	69.78
2013 Est. HHs by HH Income	17,456	
CY HHs, Inc Less Than \$15,000	4,453	25.51
CY HHs, Inc \$15,000 - \$24,999	3,049	17.47
CY HHs, Inc \$25,000 - \$34,999	2,610	14.95
CY HHs, Inc \$35,000 - \$49,999	2,418	13.85
CY HHs, Inc \$50,000 - \$74,999	2,428	13.91
CY HHs, Inc \$75,000 - \$99,999	1,166	6.68
CY HHs, Inc \$100,000 - \$124,999	525	3.01
CY HHs, Inc \$125,000 - \$149,999	282	1.62
CY HHs, Inc \$150,000 - \$199,999	298	1.71
CY HHs, Inc \$200,000 - \$249,999	90	0.52
CY HHs, Inc \$250,000 - \$499,999	111	0.64
CY HHs, Inc \$500,000+	26	0.15

DESCRIPTION	DATA	%
2013 Est. Average Household Income	\$43,287	
2013 Est. Median Household Income	\$29,699	
2012 Est. Per Capita Income	\$13,619	
2013 Median HH Inc by Single Race Class. or Ethn		
White Alone	31,683	
Black or African American Alone	14,999	
American Indian and Alaska Native Alone	46,409	
Asian Alone	54,133	
Native Hawaiian and Other Pacific Islander Alone	44,651	
Some Other Race Alone	29,333	
Two or More Races	47,688	
Hispanic or Latino	29,807	
Not Hispanic or Latino	29,270	
2013 Est. Family HH Type, Presence Own Children	11,017	
Married-Couple Family, own children	2,876	26.11
Married-Couple Family, no own children	3,409	30.94
Male Householder, own children	459	4.17
Male Householder, no own children	905	8.21
Female Householder, own children	1,569	14.24
Female Householder, no own children	1,799	16.33



# HARRISBURG SUBMARKET RETAIL TRADE AREA DEMOGRAPHICS

## Houston, Texas

DESCRIPTION	DATA	%
2013 Est. Households by Household Size	17,456	
1-person household	5,099	29.21
2-person household	4,242	24.30
3-person household	2,592	14.85
4-person household	2,243	12.85
5-person household	1,611	9.23
6-person household	903	5.17
7 or more person household	767	4.39
2013 Est. Average Household Size	2.86	
2013 Est. Households by Presence of People	17,456	
Households with 1 or more People under Age 18:	6,076	34.81
Married-Couple Family	3,176	52.27
Other Family, Male Householder	650	10.70
Other Family, Female Householder	2,184	35.94
Nonfamily, Male Householder	59	0.97
Nonfamily, Female Householder	7	0.12
Households no People under Age 18:	11,381	65.20
Married-Couple Family	3,071	26.98
Other Family, Male Householder	708	6.22
Other Family, Female Householder	1,157	10.17
Nonfamily, Male Householder	3,896	34.23
Nonfamily, Female Householder	2,548	22.39

DESCRIPTION	DATA	%
2013 Est. Households by Number of Vehicles	17,456	
No Vehicles	3,096	17.74
1 Vehicle	7,452	42.69
2 Vehicles	4,831	27.68
3 Vehicles	1,535	8.79
4 Vehicles	355	2.03
5 or more Vehicles	188	1.08
2013 Est. Average Number of Vehicles	1	
Family Households		
2018 Projection	11,300	
2013 Estimate	11,017	
2010 Census	10,885	
2000 Census	12,429	
Growth 2013-2018	2.57%	
Growth 2010-2013	1.21%	
Growth 2000-2010	-12.42%	
2013 Est. Families by Poverty Status	11,017	
2013 Families at or Above Poverty	7,876	71.49
2013 Families at or Above Poverty with Children	3,634	32.99
2013 Families Below Poverty	3,141	28.51
2013 Families Below Poverty with Children	2,486	22.57
2013 Est. Pop Age 16+ by Employment Status	41,184	
In Armed Forces	1	0.00
Civilian - Employed	22,653	55.00
Civilian - Unemployed	2,605	6.33
Not in Labor Force	15,925	38.67

# HARRISBURG SUBMARKET RETAIL TRADE AREA DEMOGRAPHICS

## Houston, Texas

DESCRIPTION	DATA	%
2013 Est. Civ Employed Pop 16+ Class of Worker	23,265	
For-Profit Private Workers	17,904	76.96
Non-Profit Private Workers	1,037	4.46
Local Government Workers	1,349	5.80
State Government Workers	676	2.91
Federal Government Workers	298	1.28
Self-Emp Workers	1,967	8.45
Unpaid Family Workers	35	0.15
2013 Est. Civ Employed Pop 16+ by Occupation	23,265	
Architect/Engineer	328	1.41
Arts/Entertain/Sports	248	1.07
Building Grounds Maint	2,002	8.61
Business/Financial Ops	697	3.00
Community/Soc Svcs	116	0.50
Computer/Mathematical	322	1.38
Construction/Extraction	3,658	15.72
Edu/Training/Library	818	3.52
Farm/Fish/Forestry	54	0.23
Food Prep/Serving	1,832	7.87
Health Practitioner/Tec	518	2.23
Healthcare Support	513	2.21
Maintenance Repair	711	3.06
Legal	248	1.07
Life/Phys/Soc Science	102	0.44
Management	931	4.00
Office/Admin Support	2,924	12.57
Production	2,311	9.93
Protective Svcs	325	1.40
Sales/Related	1,733	7.45
Personal Care/Svc	524	2.25
Transportation/Moving	2,350	10.10

DESCRIPTION	DATA	%
2013 Est. Pop 16+ by Occupation Classification	23,265	
Blue Collar	9,030	38.81
White Collar	8,985	38.62
Service and Farm	5,250	22.57
2013 Est. Workers Age 16+, Transp. To Work	22,770	
Drove Alone	15,120	66.40
Car Pooled	3,437	15.09
Public Transportation	1,836	8.06
Walked	869	3.82
Bicycle	166	0.73
Other Means	823	3.61
Worked at Home	519	2.28
2013 Est. Workers Age 16+ by Travel Time to Work *		
Less than 15 Minutes	5,382	
15 - 29 Minutes	8,802	
30 - 44 Minutes	4,938	
45 - 59 Minutes	1,225	
60 or more Minutes	1,877	
2013 Est. Avg Travel Time to Work in Minutes	27.92	
2013 Est. Tenure of Occupied Housing Units	17,456	
Owner Occupied	7,157	41.00
Renter Occupied	10,299	59.00
2013 Owner Occ. HUs: Avg. Length of Residence	22.6	
2013 Renter Occ. HUs: Avg. Length of Residence	7.7	

## HARRISBURG SUBMARKET RETAIL TRADE AREA DEMOGRAPHICS

### Houston, Texas

DESCRIPTION	DATA	%
2013 Est. All Owner-Occupied Housing Values	7,157	
Value Less than \$20,000	116	1.62
Value \$20,000 - \$39,999	136	1.90
Value \$40,000 - \$59,999	657	9.18
Value \$60,000 - \$79,999	1,749	24.44
Value \$80,000 - \$99,999	1,728	24.14
Value \$100,000 - \$149,999	1,170	16.35
Value \$150,000 - \$199,999	684	9.56
Value \$200,000 - \$299,999	756	10.56
Value \$300,000 - \$399,999	132	1.84
Value \$400,000 - \$499,999	12	0.17
Value \$500,000 - \$749,999	3	0.04
Value \$750,000 - \$999,999	10	0.14
Value \$1,000,000 or more	4	0.06
2013 Est. Median All Owner-Occupied Housing Value	\$90,652	
2013 Est. Housing Units by Units in Structure	21,143	
1 Unit Attached	1,442	6.82
1 Unit Detached	11,583	54.78
2 Units	1,833	8.67
3 or 4 Units	1,782	8.43
5 to 19 Units	1,869	8.84
20 to 49 Units	752	3.56
50 or More Units	1,819	8.60
Mobile Home or Trailer	35	0.17
Boat, RV, Van, etc.	27	0.13

DESCRIPTION	DATA	%
2013 Est. Housing Units by Year Structure Built	21,143	
Housing Unit Built 2005 or later	1,289	6.10
Housing Unit Built 2000 to 2004	1,133	5.36
Housing Unit Built 1990 to 1999	848	4.01
Housing Unit Built 1980 to 1989	1,174	5.55
Housing Unit Built 1970 to 1979	1,675	7.92
Housing Unit Built 1960 to 1969	2,276	10.76
Housing Unit Built 1950 to 1959	3,537	16.73
Housing Unit Built 1940 to 1949	4,329	20.47
Housing Unit Built 1939 or Earlier	4,882	23.09
2013 Est. Median Year Structure Built	1954	



C. Kelly Cofer  
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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

The observations, conclusions and recommendations contained in this study are solely those of The Retail Coach, LLC and should not be construed to represent the opinions of others, including its clients, or any other entity prior to such entity's express approval of this study.

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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