



# RETAIL GAP ANALYSIS

## Navigation Submarket Retail Trade Area

### Houston, Texas

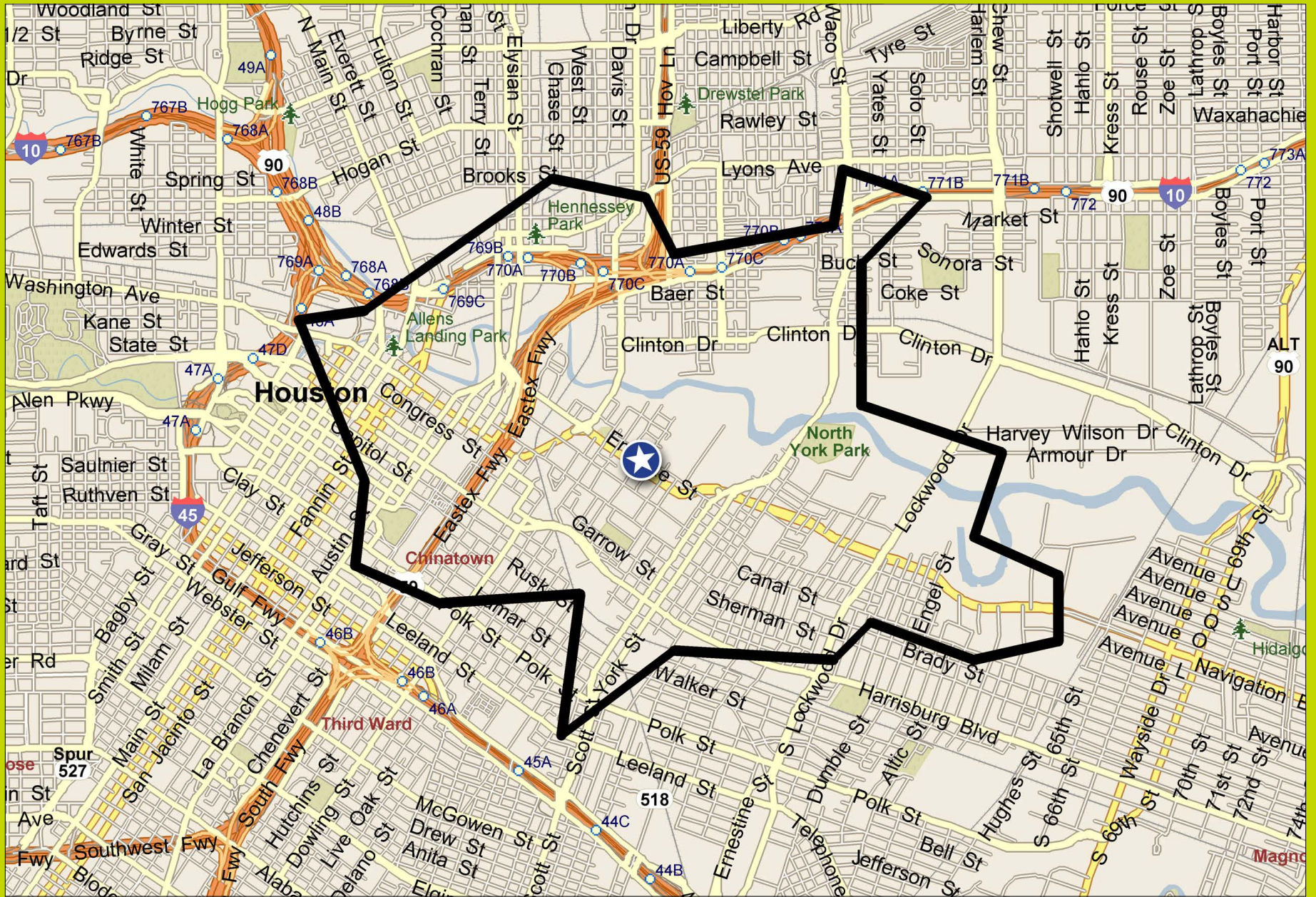
*May 2013*





## NAVIGATION SUBMARKET RETAIL TRADE AREA MAP

### Houston, Texas





# NAVIGATION 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	\$5,758,455	\$0	-\$5,758,455	-100%
523	Paint, Glass and Wallpaper	\$1,732,974	\$0	-\$1,732,974	-100%
525	Hardware Stores	\$3,381,373	\$0	-\$3,381,373	-100%
526	Retail Nurseries and Garden	\$1,893,741	\$0	-\$1,893,741	-100%
527	Mobile Home Dealers	\$635,172	\$0	-\$635,172	-100%
53	General Merchandise Stores	\$21,497,980	\$4,000,000	-\$17,497,980	-81%
541	Grocery Stores	\$24,593,630	\$0	-\$24,593,630	-100%
542	Meat and Fish Markets	\$781,809	\$0	-\$781,809	-100%
543	Fruit and Vegetable Markets	\$478,492	\$800,000	\$321,508	67%
544	Candy, Nut and Confection Stores	\$81,249	\$0	-\$81,249	-100%
545	Dairy Products Stores	\$41,421	\$0	-\$41,421	-100%
546	Retail Bakeries	\$294,313	\$0	-\$294,313	-100%
549	Miscellaneous Food Stores	\$1,677,769	\$1,100,000	-\$577,769	-34%
551	New and Used Car Dealers	\$30,109,030	\$0	-\$30,109,030	-100%
552	Used Car Dealers	\$5,472,177	\$0	-\$5,472,177	-100%
553	Auto and Home Supply Stores	\$7,209,584	\$0	-\$7,209,584	-100%
554	Gasoline Service Stations	\$6,608,907	\$9,000,000	\$2,391,094	36%
555	Boat Dealers	\$619,449	\$0	-\$619,449	-100%
556	Recreational Vehicle Dealers	\$987,183	\$800,000	-\$187,183	-19%
557	Motorcycle Dealers	\$871,786	\$0	-\$871,786	-100%
559	Automotive Dealers, NEC	\$1,428,618	\$0	-\$1,428,618	-100%
561	Men's and Boys' Clothing Stores	\$488,535	\$700,000	\$211,465	43%
562	Women's Clothing Stores	\$938,905	\$0	-\$938,905	-100%
563	Women's Accessory and Specialty Stores	\$136,801	\$0	-\$136,801	-100%
564	Children's and Infants' Wear	\$242,363	\$0	-\$242,363	-100%
565	Family Clothing Stores	\$1,074,182	\$0	-\$1,074,182	-100%
566	Shoe Stores	\$1,240,421	\$0	-\$1,240,421	-100%
569	Miscellaneous Apparel and Accessory Stores	\$609,128	\$0	-\$609,128	-100%
571	Home Furniture and Furnishing	\$5,357,680	\$0	-\$5,357,680	-100%
572	Household Appliance Stores	\$1,151,552	\$0	-\$1,151,552	-100%
573	Radio, TV, and Computer Stores	\$12,648,510	\$0	-\$12,648,510	-100%
5812	Eating Places	\$27,929,010	\$11,000,000	-\$16,929,010	-61%

# NAVIGATION 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	\$838,538	\$0	-\$838,538	-100%
591	Drug Stores and Proprietary	\$5,371,880	\$0	-\$5,371,880	-100%
592	Liquor Stores	\$535,290	\$0	-\$535,290	-100%
593	Used Merchandise Stores	\$1,106,737	\$0	-\$1,106,737	-100%
5941	Sporting Goods, Bicycle and Gun Stores	\$938,004	\$0	-\$938,004	-100%
5942	Book Stores	\$402,299	\$0	-\$402,299	-100%
5943	Stationery Stores	\$1,393,777	\$0	-\$1,393,777	-100%
5944	Jewelry Stores	\$651,588	\$0	-\$651,588	-100%
5945	Hobby, Toy and Game Shops	\$730,275	\$100,000	-\$630,275	-86%
5946	Camera and Photography Supply Stores	\$52,504	\$0	-\$52,504	-100%
5947	Gift, Novelty and Souvenir Shops	\$844,910	\$0	-\$844,910	-100%
5948	Luggage and Leather Goods Stores	\$33,109	\$0	-\$33,109	-100%
5949	Sewing, Needlework and Craft Stores	\$99,743	\$0	-\$99,743	-100%
596	Non-store Retailers	\$2,080,483	\$0	-\$2,080,483	-100%
598	Fuel and Ice Dealers	\$174,482	\$0	-\$174,482	-100%
5992	Florists	\$428,966	\$100,000	-\$328,966	-77%
5993	Tobacco Stores and Stands	\$92,193	\$0	-\$92,193	-100%
5994	News Dealers and Newsstands	\$63,240	\$0	-\$63,240	-100%
5995	Optical Goods Stores	\$514,857	\$0	-\$514,857	-100%
5999	Miscellaneous Retail Stores, NEC	\$7,567,760	\$1,400,000	-\$6,167,760	-82%
	TOTALS	\$191,892,800	\$29,000,000	-\$162,892,800	LEAKAGE

## NAVIGATION SUBMARKET RETAIL TRADE AREA DEMOGRAPHICS

### Houston, Texas

DESCRIPTION	DATA	%
Population		
2018 Projection	28,273	
2013 Estimate	27,105	
2010 Census	26,418	
2000 Census	23,250	
Growth 2013-2018	4.31%	
Growth 2010-2013	2.60%	
Growth 2000-2010	13.63%	
2013 Est. Pop by Single Race Class	27,105	
White Alone	13,974	51.56
Black or African American Alone	8,633	31.85
Amer. Indian and Alaska Native Alone	109	0.40
Asian Alone	416	1.53
Native Hawaiian and Other Pac. Isl. Alone	11	0.04
Some Other Race Alone	3,355	12.38
Two or More Races	607	2.24
2013 Est. Pop Hisp or Latino by Origin	27,105	
Not Hispanic or Latino	16,445	60.67
Hispanic or Latino:	10,660	39.33
Mexican	9,325	87.48
Puerto Rican	83	0.78
Cuban	34	0.32
All Other Hispanic or Latino	1,218	11.43

DESCRIPTION	DATA	%
2013 Est. Hisp or Latino by Single Race Class	10,660	
White Alone	7,026	65.91
Black or African American Alone	137	1.29
American Indian and Alaska Native Alone	59	0.55
Asian Alone	22	0.21
Native Hawaiian and Other Pacific Islander Alone	3	0.03
Some Other Race Alone	2,970	27.86
Two or More Races	443	4.16
2013 Est. Pop. Asian Alone Race by Cat	416	
Chinese, except Taiwanese	50	12.02
Filipino	36	8.65
Japanese	1	0.24
Asian Indian	61	14.66
Korean	2	0.48
Vietnamese	230	55.29
Cambodian	3	0.72
Hmong	0	0.00
Laotian	1	0.24
Thai	4	0.96
All Other Asian Races Including 2+ Category	28	6.73

## NAVIGATION SUBMARKET RETAIL TRADE AREA DEMOGRAPHICS

### Houston, Texas

DESCRIPTION	DATA	%
2013 Est. Population by Ancestry	27,105	
Pop, Arab	52	0.19
Pop, Czech	24	0.09
Pop, Danish	20	0.07
Pop, Dutch	29	0.11
Pop, English	315	1.16
Pop, French (except Basque)	250	0.92
Pop, French Canadian	3	0.01
Pop, German	800	2.95
Pop, Greek	0	0.00
Pop, Hungarian	0	0.00
Pop, Irish	412	1.52
Pop, Italian	182	0.67
Pop, Lithuanian	12	0.04
Pop, United States or American	847	3.12
Pop, Norwegian	34	0.13
Pop, Polish	35	0.13
Pop, Portuguese	0	0.00
Pop, Russian	22	0.08
Pop, Scottish	69	0.25
Pop, Scotch-Irish	50	0.18
Pop, Slovak	12	0.04
Pop, Sub-Saharan African	323	1.19
Pop, Swedish	21	0.08
Pop, Swiss	0	0.00
Pop, Ukrainian	0	0.00
Pop, Welsh	11	0.04
Pop, West Indian (exc Hisp groups)	54	0.20
Pop, Other ancestries	21,241	78.37
Pop, Ancestry Unclassified	2,287	8.44

DESCRIPTION	DATA	%
2013 Est. Pop Age 5+ by Language Spoken At Home	25,978	
Speak Only English at Home	14,344	55.22
Speak Asian/Pac. Isl. Lang. at Home	474	1.82
Speak Indo-European Language at Home	235	0.90
Speak Spanish at Home	10,741	41.35
Speak Other Language at Home	185	0.71
2013 Est. Population by Sex	27,105	
Male	18,728	69.09
Female	8,377	30.91
2013 Est. Population by Age	27,105	
Age 0 - 4	1,127	4.16
Age 5 - 9	978	3.61
Age 10 - 14	925	3.41
Age 15 - 17	675	2.49
Age 18 - 20	1,690	6.24
Age 21 - 24	2,550	9.41
Age 25 - 34	6,848	25.26
Age 35 - 44	4,709	17.37
Age 45 - 54	3,939	14.53
Age 55 - 64	2,293	8.46
Age 65 - 74	867	3.20
Age 75 - 84	360	1.33
Age 85 and over	144	0.53
Age 16 and over	23,901	88.18
Age 18 and over	23,399	86.33
Age 21 and over	21,709	80.09
Age 65 and over	1,371	5.06
2013 Est. Median Age	33.2	
2013 Est. Average Age	35.10	

## NAVIGATION SUBMARKET RETAIL TRADE AREA DEMOGRAPHICS

### Houston, Texas

DESCRIPTION	DATA	%
2013 Est. Male Population by Age	18,728	
Age 0 - 4	571	3.05
Age 5 - 9	497	2.65
Age 10 - 14	469	2.50
Age 15 - 17	435	2.32
Age 18 - 20	1,336	7.13
Age 21 - 24	1,909	10.19
Age 25 - 34	5,001	26.70
Age 35 - 44	3,429	18.31
Age 45 - 54	2,879	15.37
Age 55 - 64	1,523	8.13
Age 65 - 74	479	2.56
Age 75 - 84	156	0.83
Age 85 and over	45	0.24
2013 Est. Median Age, Male	33.3	
2013 Est. Average Age, Male	35.10	
2013 Est. Female Population by Age	8,377	
Age 0 - 4	556	6.64
Age 5 - 9	481	5.74
Age 10 - 14	456	5.44
Age 15 - 17	240	2.86
Age 18 - 20	355	4.24
Age 21 - 24	641	7.65
Age 25 - 34	1,847	22.05
Age 35 - 44	1,280	15.28
Age 45 - 54	1,060	12.65
Age 55 - 64	770	9.19
Age 65 - 74	388	4.63
Age 75 - 84	205	2.45
Age 85 and over	98	1.17

DESCRIPTION	DATA	%
2013 Est. Median Age, Female	32.9	
2013 Est. Average Age, Female	35.00	
2013 Est. Pop Age 15+ by Marital Status	24,075	
Total, Never Married	11,093	46.08
Males, Never Married	8,607	35.75
Females, Never Married	2,486	10.33
Married, Spouse present	4,453	18.50
Married, Spouse absent	4,592	19.07
Widowed	873	3.63
Males Widowed	241	1.00
Females Widowed	632	2.63
Divorced	3,064	12.73
Males Divorced	2,401	9.97
Females Divorced	664	2.76
2013 Est. Pop. Age 25+ by Edu. Attainment	19,159	
Less than 9th grade	3,620	18.89
Some High School, no diploma	3,765	19.65
High School Graduate (or GED)	5,018	26.19
Some College, no degree	2,714	14.17
Associate Degree	808	4.22
Bachelor's Degree	2,012	10.50
Master's Degree	764	3.99
Professional School Degree	360	1.88
Doctorate Degree	98	0.51
2013 Est Pop Age 25+ by Edu. Attain, Hisp. or Lat	6,863	
CY Pop 25+, Hisp/Lat, Less Than High School Diploma	3,878	56.51
CY Pop 25+, Hisp/Lat, High School Graduate	1,585	23.09
CY Pop 25+, Hisp/Lat, Some College or Associate's Degree	1,053	15.34
CY Pop 25+, Hisp/Lat, Bachelor's Degree or Higher	347	5.06

## NAVIGATION SUBMARKET RETAIL TRADE AREA DEMOGRAPHICS

### Houston, Texas

DESCRIPTION	DATA	%
Households		
2018 Projection	6,964	
2013 Estimate	6,259	
2010 Census	5,788	
2000 Census	4,135	
Growth 2013-2018	11.26%	
Growth 2010-2013	8.14%	
Growth 2000-2010	39.98%	
2013 Est. Households by Household Type	6,259	
Family Households	2,932	46.84
Nonfamily Households	3,328	53.17
2013 Est. Group Quarters Population	12,748	
2013 HHs by Ethnicity, Hispanic/Latino	2,607	41.65
2013 Est. HHs by HH Income	6,259	
CY HHs, Inc Less Than \$15,000	1,753	28.01
CY HHs, Inc \$15,000 - \$24,999	756	12.08
CY HHs, Inc \$25,000 - \$34,999	764	12.21
CY HHs, Inc \$35,000 - \$49,999	624	9.97
CY HHs, Inc \$50,000 - \$74,999	882	14.09
CY HHs, Inc \$75,000 - \$99,999	520	8.31
CY HHs, Inc \$100,000 - \$124,999	293	4.68
CY HHs, Inc \$125,000 - \$149,999	191	3.05
CY HHs, Inc \$150,000 - \$199,999	266	4.25
CY HHs, Inc \$200,000 - \$249,999	82	1.31
CY HHs, Inc \$250,000 - \$499,999	104	1.66
CY HHs, Inc \$500,000+	23	0.37

DESCRIPTION	DATA	%
2013 Est. Average Household Income	\$56,838	
2013 Est. Median Household Income	\$33,121	
2012 Est. Per Capita Income	\$15,596	
2013 Median HH Inc by Single Race Class. or Ethn		
White Alone	42,776	
Black or African American Alone	14,999	
American Indian and Alaska Native Alone	60,322	
Asian Alone	58,016	
Native Hawaiian and Other Pacific Islander Alone	67,519	
Some Other Race Alone	32,713	
Two or More Races	58,713	
Hispanic or Latino	27,709	
Not Hispanic or Latino	40,576	
2013 Est. Family HH Type, Presence Own Children	2,932	
Married-Couple Family, own children	649	22.14
Married-Couple Family, no own children	1,117	38.10
Male Householder, own children	113	3.85
Male Householder, no own children	194	6.62
Female Householder, own children	443	15.11
Female Householder, no own children	416	14.19



## NAVIGATION SUBMARKET RETAIL TRADE AREA DEMOGRAPHICS

### Houston, Texas

DESCRIPTION	DATA	%
2013 Est. Households by Household Size	6,259	
1-person household	2,776	44.35
2-person household	1,603	25.61
3-person household	661	10.56
4-person household	483	7.72
5-person household	334	5.34
6-person household	204	3.26
7 or more person household	198	3.16
2013 Est. Average Household Size	2.29	
2013 Est. Households by Presence of People	6,259	
Households with 1 or more People under Age 18:	1,498	23.93
Married-Couple Family	727	48.53
Other Family, Male Householder	194	12.95
Other Family, Female Householder	578	38.58
Nonfamily, Male Householder	0	0.00
Nonfamily, Female Householder	0	0.00
Households no People under Age 18:	4,761	76.07
Married-Couple Family	1,059	22.24
Other Family, Male Householder	123	2.58
Other Family, Female Householder	292	6.13
Nonfamily, Male Householder	1,999	41.99
Nonfamily, Female Householder	1,288	27.05

DESCRIPTION	DATA	%
2013 Est. Households by Number of Vehicles	6,259	
No Vehicles	1,356	21.66
1 Vehicle	3,131	50.02
2 Vehicles	1,352	21.60
3 Vehicles	277	4.43
4 Vehicles	94	1.50
5 or more Vehicles	49	0.78
2013 Est. Average Number of Vehicles	1	
Family Households		
2018 Projection	3,177	
2013 Estimate	2,932	
2010 Census	2,782	
2000 Census	2,651	
Growth 2013-2018	8.36%	
Growth 2010-2013	5.39%	
Growth 2000-2010	4.94%	
2013 Est. Families by Poverty Status	2,932	
2013 Families at or Above Poverty	1,994	68.01
2013 Families at or Above Poverty with Children	756	25.78
2013 Families Below Poverty	938	31.99
2013 Families Below Poverty with Children	758	25.85
2013 Est. Pop Age 16+ by Employment Status	23,901	
In Armed Forces	0	0.00
Civilian - Employed	7,149	29.91
Civilian - Unemployed	1,244	5.20
Not in Labor Force	15,508	64.88

## NAVIGATION SUBMARKET RETAIL TRADE AREA DEMOGRAPHICS

### Houston, Texas

DESCRIPTION	DATA	%
2013 Est. Civ Employed Pop 16+ Class of Worker	7,132	
For-Profit Private Workers	5,193	72.81
Non-Profit Private Workers	466	6.53
Local Government Workers	271	3.80
State Government Workers	189	2.65
Federal Government Workers	166	2.33
Self-Emp Workers	845	11.85
Unpaid Family Workers	3	0.04
2013 Est. Civ Employed Pop 16+ by Occupation	7,132	
Architect/Engineer	206	2.89
Arts/Entertain/Sports	84	1.18
Building Grounds Maint	496	6.95
Business/Financial Ops	417	5.85
Community/Soc Svcs	75	1.05
Computer/Mathematical	276	3.87
Construction/Extraction	828	11.61
Edu/Training/Library	276	3.87
Farm/Fish/Forestry	8	0.11
Food Prep/Serving	430	6.03
Health Practitioner/Tec	204	2.86
Healthcare Support	80	1.12
Maintenance Repair	149	2.09
Legal	168	2.36
Life/Phys/Soc Science	69	0.97
Management	515	7.22
Office/Admin Support	800	11.22
Production	623	8.74
Protective Svcs	117	1.64
Sales/Related	569	7.98
Personal Care/Svc	209	2.93
Transportation/Moving	532	7.46

DESCRIPTION	DATA	%
2013 Est. Pop 16+ by Occupation Classification	7,132	
Blue Collar	2,133	29.91
White Collar	3,659	51.30
Service and Farm	1,341	18.80
2013 Est. Workers Age 16+, Transp. To Work	7,060	
Drove Alone	4,581	64.89
Car Pooled	785	11.12
Public Transportation	647	9.16
Walked	343	4.86
Bicycle	40	0.57
Other Means	326	4.62
Worked at Home	338	4.79
2013 Est. Workers Age 16+ by Travel Time to Work *		
Less than 15 Minutes	1,524	
15 - 29 Minutes	2,773	
30 - 44 Minutes	1,567	
45 - 59 Minutes	293	
60 or more Minutes	547	
2013 Est. Avg Travel Time to Work in Minutes	27.47	
2013 Est. Tenure of Occupied Housing Units	6,259	
Owner Occupied	2,040	32.59
Renter Occupied	4,219	67.41
2013 Owner Occ. HUs: Avg. Length of Residence	18.1	
2013 Renter Occ. HUs: Avg. Length of Residence	7.0	

## NAVIGATION SUBMARKET RETAIL TRADE AREA DEMOGRAPHICS

### Houston, Texas

DESCRIPTION	DATA	%
2013 Est. All Owner-Occupied Housing Values	2,040	
Value Less than \$20,000	76	3.73
Value \$20,000 - \$39,999	77	3.77
Value \$40,000 - \$59,999	136	6.67
Value \$60,000 - \$79,999	406	19.90
Value \$80,000 - \$99,999	449	22.01
Value \$100,000 - \$149,999	181	8.87
Value \$150,000 - \$199,999	273	13.38
Value \$200,000 - \$299,999	328	16.08
Value \$300,000 - \$399,999	67	3.28
Value \$400,000 - \$499,999	35	1.72
Value \$500,000 - \$749,999	7	0.34
Value \$750,000 - \$999,999	0	0.00
Value \$1,000,000 or more	4	0.20
2013 Est. Median All Owner-Occupied Housing Value	\$94,442	
2013 Est. Housing Units by Units in Structure	7,522	
1 Unit Attached	555	7.38
1 Unit Detached	2,830	37.62
2 Units	409	5.44
3 or 4 Units	496	6.59
5 to 19 Units	581	7.72
20 to 49 Units	446	5.93
50 or More Units	2,192	29.14
Mobile Home or Trailer	13	0.17
Boat, RV, Van, etc.	1	0.01

DESCRIPTION	DATA	%
2013 Est. Housing Units by Year Structure Built	7,522	
Housing Unit Built 2005 or later	960	12.76
Housing Unit Built 2000 to 2004	934	12.42
Housing Unit Built 1990 to 1999	475	6.31
Housing Unit Built 1980 to 1989	297	3.95
Housing Unit Built 1970 to 1979	306	4.07
Housing Unit Built 1960 to 1969	616	8.19
Housing Unit Built 1950 to 1959	765	10.17
Housing Unit Built 1940 to 1949	920	12.23
Housing Unit Built 1939 or Earlier	2,248	29.89
2013 Est. Median Year Structure Built	1958	



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.**

The Retail Coach, LLC | P. O. Box 7272 | Tupelo, Mississippi 38802  
Tel 662.844.2155 | Fax 662.844.2738 | Email [info@theretailcoach.net](mailto:info@theretailcoach.net) | Web [www.theretailcoach.net](http://www.theretailcoach.net)





## 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.

All information furnished is from sources deemed reliable and is submitted subject to errors, omissions, change of terms and/or conditions.