



TheRetailCoach®

Moving Beyond Data

RETAIL GAP ANALYSIS

Retail Trade Area

Fulshear, Texas



Presented to
City of Fulshear

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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 Retail360 process, The Retail Coach offers a dynamic system of products and services that better enable communities to maximize their retail development potential.

Retail360 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 Retail360 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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Overview

The Retail Coach™ utilizes a proprietary model that estimates retail spending potential for a retail trade area based upon population, income, and consumer spending patterns. Using the algorithms within this model, we are then able to determine the extent to which a community is or is not capturing its sales potential based upon retail sales data published by Claritas, a private demographic and data vendor.

In order to determine the anticipated pattern of retail spending for a trade area, our model uses a benchmarked control area. For the purposes of this study, the control area has been defined as the State. The purpose of the control area is to account for characteristics unique to individual markets that might artificially inflate or deflate the calculated spending pattern of area residents.

Understanding the pattern of retail spending within a community as it relates to the spending patterns of the State is critical. The Retail Coach's model analyzes these patterns for all retail sales in an area, including taxable and nontaxable sales, to further determine which retail sectors are exhibiting "leakage" and which sectors are exhibiting "surplus."

Or, put more simply, retail sectors in which spending is not fully captured are called "leakage" categories, while retail categories in which more sales are captured than are generated by residents are called "attraction" or "surplus" categories.

A retail sales surplus indicates that a community pulls consumers and retail dollars in from outside the trade area, thereby serving as a regional market. Conversely, when local demand for a specific product is not being met within a trade area, consumers are going elsewhere to shop creating retail leakage. Retail strategies can be developed for specific retail sectors by analyzing the estimation of retail surpluses and leakages, giving retailers a snapshot of the relative strengths and weaknesses of a community's retail market. Generally, attraction or surplus categories signal particular strengths of a retail market, while leakage categories signal particular weaknesses.

It should be kept in mind that a retail trade area analysis is based on averages. Many times there are mitigating factors that can cause a trade area's retail potential to deviate substantially from ordinary market conditions. Proximity to larger regional shopping areas, natural barriers (such as lakes and mountains), and road systems are just a few of the factors that could greatly impact a market's retail potential.

A Retail Gap Analysis is not designed as a detailed plan of action nor is it an exact science. Rather, it provides the necessary input for the most important aspect of a retail development strategy - the recruitment of retailers for those retail sectors that are currently not meeting the needs of a community. Please see the section entitled "*How to Best Utilize the Retail Gap Analysis*" for additional suggestions on using the Retail Gap Analysis to help create and carry out your comprehensive development strategy.

Study Analysis

All primary retail categories are studied using the most current data available. Potential sales are compiled and compared to estimated actual retail sales to determine if there is a surplus or leakage of retail trade.

Retail sales estimates are computed at the establishment level by using actual sales volume data available for publicly held companies. Therefore, only a minority of businesses on the infoUSA™ base file has sales volume data when the file is delivered to Claritas. Claritas models sales volume based on actual data from a national sample of approximately six million businesses. The model is calculated at the four digit Standard Industrial Classification (SIC) code level with the results applied to those records for which no actual sales volume exists. This enhancement results in virtually all records having an estimated sales volume, except for government records. For a more detailed look at the SIC code level breakdown, please see *Appendix A: SIC Code Detail Listing*.

The following excerpt is the "Sales Volume Data" section of the Claritas Business-Facts Methodology (February 2002) and should provide an overview of how Claritas' numbers are derived:

Sales Volume Data

InfoUSA™ provides actual sales information only for publicly held companies. Sales figures, therefore, for all other companies must be estimated. The infoUSA™ model uses aggregated sales divided by the aggregated number of employees by SIC to arrive at sales per employee. This aggregated method does not factor in the distribution of employees by SIC, and may allow large corporations to have a disproportionate effect on the sales-per-employee estimate.

In comparison, Claritas models sales volume based on actual data from a national sample of approximately six million businesses. The model is calculated at the four-digit Standard Industrial Classification (SIC) code level with the results applied to those records for which no actual sales volume figures exist. This enhancement results in virtually all records having an estimated sales volume, except for government records. However, since one number is being applied to remaining businesses in a four-digit SIC industry, analyzing a business as a member of a sales range is more appropriate than looking at the specific sales volume for that business.

As with the employment information, Claritas' clients will benefit from the combined actual/modeled sales data with better coverage and more information for modeling and other analytical applications.

Retail Gap Analysis Notes

In some markets, two particular situations may appear to be discrepancies when they occur in a Retail Gap Analysis.

First, the amount exhibited for a particular SIC sector's estimated actual sales may be lower (sometimes significantly so) than expected. In these circumstances, the retailers have often reported sales figures under a different SIC code.

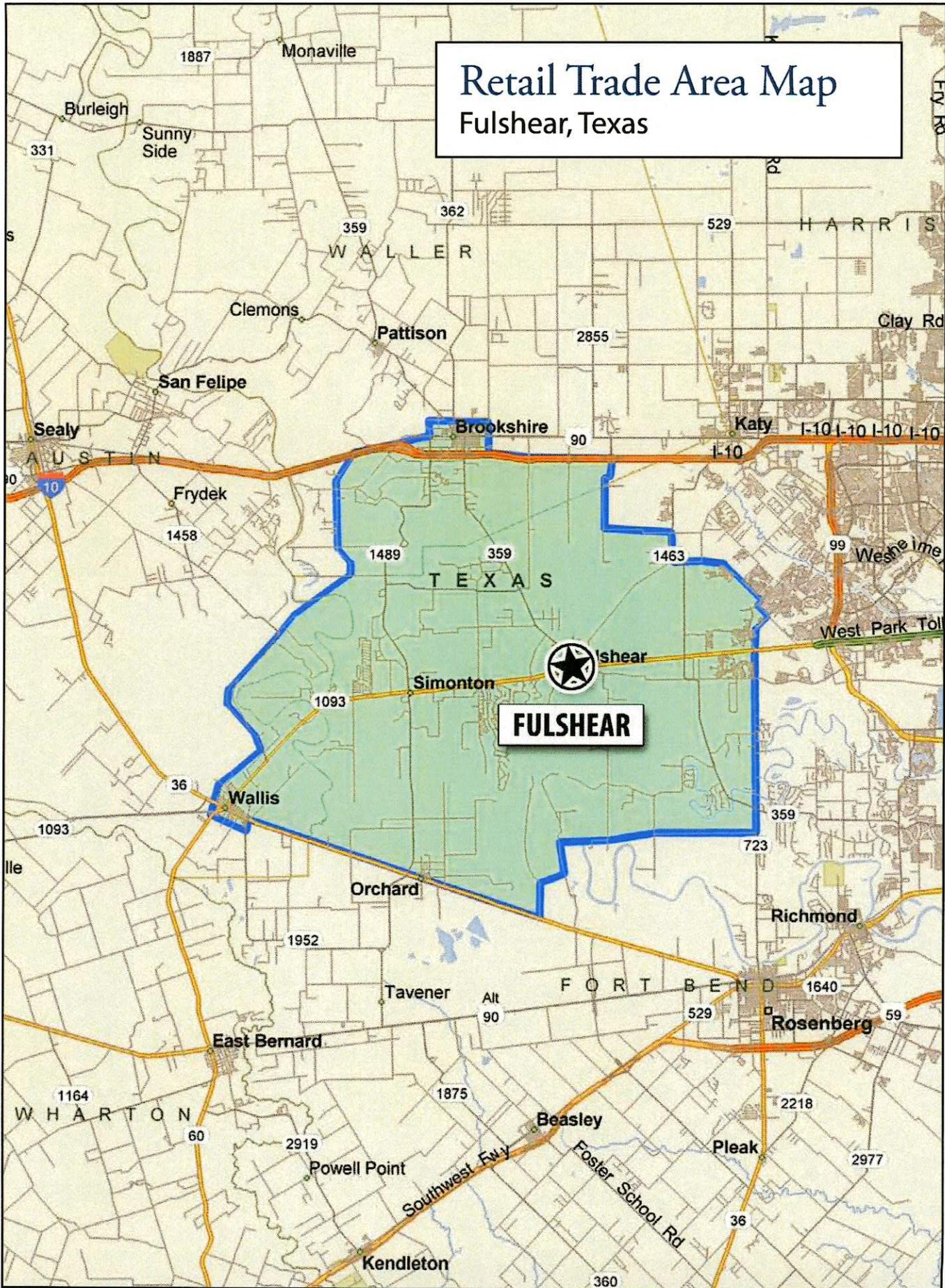
For example, some Women's Clothing Stores (SIC 562) may in fact report sales figures under Family Clothing Stores (SIC 565), etc.

The second situation arises when the amount exhibited for a particular SIC sector's estimated actual sales is reported as \$0, even though there are known retailers in a market operating under that SIC code. When there are only two or three retailers in that market reporting under that SIC code, the numbers are often reported as \$0 to protect each retailer's proprietary financial information.

For example, if there were two retailers in a market operating under a specific SIC code, and total estimated actual sales were listed, either retailer could extrapolate its competitor's estimated actual retail sales figures by deducting its own figures from the total listed for that SIC code.

Retail Trade Area Map

Fulshear, Texas



Utilizing the Retail Gap Analysis

1. Identify retail sectors with leakage amounts.

If your community's Retail Gap Analysis shows Shoe Store leakage of \$1,250,000, this means that consumers in your community are routinely traveling outside of your community to purchase shoes.

This may signify the need to recruit a regional or national brand shoe retailer to secure a site in your community and stop the Shoe Store sales leakage.

It also identifies the opportunity for an existing retailer in your community to expand its merchandise mix to include shoes or to expand its shoe offerings.

2. Based on this list of leakage sectors, research and identify target retailers (and restaurants), and then determine if their site selection criteria and your community's demographic profile is a match.

If the Retail Gap Analysis identifies a Shoe Store leakage, this is an opportunity to target specific shoe store retailers for recruiting to your community.

Determine the site selection criteria of each targeted shoe store retailer and compare it to your community's retail trade area demographic profile to determine if it is a match. If there is a match, the targeted retailer becomes a prospect.

Based on this research, you may identify various prospects such as Shoe Show, Rack Room Shoes and Payless ShoeSource for your community.

Targeting the right retailers and restaurants for your community increases your ability to recruit those which are a "best fit" and helps eliminate wasted time in trying to recruit those whose requirements are unattainable by your community. It takes great time and effort, but in the long run, performing this step correctly increases your community's odds of retail success.

3. Research and identify the real estate site selectors for each targeted retailer and keep track of their contact information in a database or a spreadsheet.

Using the list of prospects identified above, contact each prospect's corporate office, ask to speak with the real estate department and obtain the name and contact information for the site selector who is responsible for new store development in your specific geographic region.

Often, corporate site selectors will work through real estate brokers who perform cursory reviews of your community's markets and specific sites within your community, before information is forwarded to the corporate site selector.

There are numerous calls and contacts to be made, and there are many steps in this process of bringing together the prospects and your community, if even for preliminary consideration. Again, this step requires great time and effort, but it is a vital step in recruiting the right retailers to your community.

4. Identify potential locations in your community for each targeted retailer, based on their specific site selection criteria.

Before you personally contact the targeted retailers, you need to identify potential locations in your community based on their specific requirements.

It would be beneficial to maintain a database of all available properties in your community, and update this data on a regular basis as property specifics and availability may change often in some areas, especially as it relates to your ongoing contact with retailers.

Each retailer has a preference as to which property type best fits their needs. It could be freestanding buildings, inline spaces in a shopping center or pad sites in front of regional shopping centers (We have included the Retail Site Data Form in Appendix B as an example of the type of information to gather and keep on file regarding each property).

What retailers look for:

- a. Market Conditions – retailers look for stable-to-improving communities. If you have a new business or a planned business, put up a sign that says, "Project Coming Soon."
 - b. Community Development – a clean, attractive community does make a difference to retailers. Safety and security are essential.
 - c. Downtowns – most retailers still recognize downtowns as the "pulse" of a community, especially smaller communities. A healthy, vibrant downtown usually equates to a healthy, vibrant community.
 - d. Visibility – retailers have got to be seen. As a result, they look for sites that consumers can view from as far away as possible. A good example is that it takes time for a driver to make decisions, so the sooner the driver can spot the retailer, the more time the driver has to make preparations to exit the highway, main road, etc. This is the reason why corner locations are preferred by most retailers.
 - e. Accessibility – retailers look for easy, ample and clearly-marked entrance-exits from both directions of traffic. Retailers often use the terms Ingress (entrance) and Egress (exit).
 - f. Traffic Counts – retailers look closely at the number of vehicles passing in front of a location during a 24-hour period. The higher the traffic count – the more sales potential the retailer will have from that location.
 - g. Parking – adequate parking is a priority for all retailers since most locations' consumers will arrive by car. A bad parking experience will cloud consumers' views of a retailer's location and store.
 - h. Demographic profile – retailers look for locations in communities with high population density and high disposal income. Market your community in its strongest light - as a retail trade area population and not a community population. Population density and disposable incomes directly correlate to retailers sales volumes.
 - i. Competition – retailers pay close attention to their competitors and their locations, not wanting to be out-positioned. They do not want a secondary site to their competitors.
5. Send copies of the Retail Outlook Guide and Retail Gap Sector Summaries electronically or via postal mail to each targeted retailer.

Introduce your community to the prospective retailer by sending them the Retail Outlook Guide. Within a few more weeks, after they have had time to review the Retail Outlook Guide, send them the sector-specific Retail Gap Sector Summary. Both of these are included in the Retail Gap Analysis' appendices.

6. Personally contact each targeted retailer to see if they received the information and address any questions or comments they may have. And be sure to invite them to your community.

Position yourself to strongly sell your community, your retail trade area and specific opportunities based on the Retail Gap Analysis and sector-specific leakage amount.

Be able to fully explain the Retail Gap Analysis and how the leakage numbers are determined.

7. Follow up, Follow up, Follow up. You must be persistent as it may take numerous attempts to reach the retail site selectors and/or their real estate brokers.

8. Introduce the Retail Gap Analysis and its findings to entrepreneurs and existing retailers in your community. Educate them on how the analysis may be used to identify new retail opportunities and expand merchandise lines.

You may have opportunities right under your nose. For example, recently in a small community with a population of little more than 5,000 persons, the Retail Gap Analysis was used to expand a struggling downtown merchants product lines.

In that same community, the Retail Gap Analysis was used to direct an entrepreneur in establishing and opening a sporting goods store that has expanded from a leased storefront operation to a freestanding retail operation that successfully serves a broad merchandise offering.

9. Present the Retail Gap Analysis to existing property retail owners and prospective retail developers and educate them on how the findings can assist in developing their retail leasing strategies.

The Retail Gap Analysis will assist existing property retail property owners and prospective retail developers in developing a targeted retail leasing strategy.

For example, if an individual owns a lot on a major thoroughfare and it is determined that the community is leaking restaurant sales, the property owner may want to determine voids in the fast food industry and target companies for the site.

Also, if a community is leaking general merchandise sales, grocery sales and drug store sales to surrounding communities, developers may use this information to persuade grocery retailers and/or drug store retailers to take a close look at development property.

10. Continue to maintain a database of retailers and keep track of all calls and comments.

Each community in the nation is competing with others for the very same retailers, and while it can be certain that retailers will locate and expand in multiple communities, what guarantee is there that they will even consider your community in the future?

You may have the best demographics in the world for a community, but unless a retailer knows this, you are just one of many communities "hoping" to land another retailer. These retailers do their homework, and if your community is going to succeed in locating them, you need to do yours, too.

Remember, you are effectively in a sales position now, basically selling your community. Effective salespeople know that keeping in contact with clients and prospects is one of the top behaviors that distinguishes success from failure.

A few suggestions to help you maintain better communications are:

- a. Create a database of retailers that you have been in contact with (determined earlier in this section). Update this database with comments from every conversation you have with them.
- b. Know and keep track of the retailer's property requirements and keep track of available properties in your community which may meet these requirements. Know their demographic requirements, as well.
- c. Contact the retailers periodically to let them know of new property, demographic or community developments they may be interested in.
- d. Keep your community in front of retailers'"faces" so that when they are ready to move, your community will be forefront in their minds.
- e. Make use of the Retail Outlook Guide and the Retail Gap Sector Summaries in this report.

Retail Categories

BUILDING MATERIALS, GARDEN SUPPLY AND MOBILE HOMES

Making up the building materials category are lumberyards, hardware stores, paint stores, nursery stores, garden and lawn supplies, mobile home dealers and other miscellaneous materials stores. This sector holds a strong lure for farmers, many who will conduct other shopping in town, along with keeping local do-it-yourselfers in the community to shop.

GENERAL MERCHANDISE STORES

The general merchandise category consists primarily of department stores (i.e. Wal-Mart, K-Mart, J.C. Penney, Sears, Belk) and variety stores (i.e. Dollar General, Family Dollar). Comparable to anchor stores in a shopping mall, these department and variety stores, play an important role in communities and are strong attractants to shoppers.

FOOD STORES

The food store category is comprised primarily of grocery stores, but also includes bakeries, meat and fish markets, fruit and vegetable markets, dairy product stores, candy and confectionery stores and miscellaneous food stores. This category is extremely important to a healthy retail sector as customers spend more money in grocery stores and shop there more often than any other type of store.

AUTOMOBILE DEALERS AND GASOLINE SERVICE STATIONS

New and used car dealers, auto supply stores, gasoline service stations, boat dealers, motorcycle dealers and recreational vehicle dealers make up the automotive retail category.

APPAREL AND ACCESSORY STORES

Apparel stores are made up of men's, women's and children's clothing stores as well as shoe stores. Small towns have a challenge of sustaining these types of stores due to the extreme competition from department stores and stores in larger cities. In today's environment, apparel stores exhibiting strong customer service and a family-oriented atmosphere will have the best opportunity for success in smaller towns.

HOME FURNITURE, FURNISHINGS AND APPLIANCES

This category includes furniture stores, floor covering stores, major appliance stores, music, video, CD stores and consumer electronics stores.

EATING AND DRINKING

This category consists of restaurants, taverns and bars and is a rapidly growing part of most economies since more and more people are eating away from home.

MISCELLANEOUS RETAIL

This miscellaneous sector includes different "specialty" retail business that could not logically be categorized into the previous retail groups. Drug stores, sporting goods stores, book stores, liquor stores, hobby and craft stores, game shops and jewelry and others are included in this category.

Summary Table

SIC	RETAIL SECTOR	POTENTIAL SALES	EST. ACTUAL SALES	SURPLUS/LEAKAGE	% SURPLUS
521	Lumber and Other Building Materials	\$11,728,920	\$0	-\$11,728,920	-100%
523	Paint, Glass and Wallpaper	\$3,155,828	\$0	-\$3,155,828	-100%
525	Hardware Stores	\$6,978,120	\$300,000	-\$6,678,120	-96%
526	Retail Nurseries and Garden	\$4,556,433	\$0	-\$4,556,433	-100%
527	Mobile Home Dealers	\$1,304,371	\$0	-\$1,304,371	-100%
53	General Merchandise Stores	\$40,469,340	\$300,000	-\$40,169,340	-99%
541	Grocery Stores	\$49,987,030	\$2,000,000	-\$47,987,030	-96%
542	Meat and Fish Markets	\$2,041,624	\$0	-\$2,041,624	-100%
543	Fruit and Vegetable Markets	\$1,023,113	\$0	-\$1,023,113	-100%
544	Candy, Nut and Confection Stores	\$205,191	\$0	-\$205,191	-100%
545	Dairy Products Stores	\$59,960	\$0	-\$59,960	-100%
546	Retail Bakeries	\$586,473	\$0	-\$586,473	-100%
549	Miscellaneous Food Stores	\$3,526,552	\$0	-\$3,526,552	-100%
551	New and Used Car Dealers	\$59,923,910	\$0	-\$59,923,910	-100%
552	Used Car Dealers	\$11,259,120	\$0	-\$11,259,120	-100%
553	Auto and Home Supply Stores	\$13,255,800	\$0	-\$13,255,800	-100%
554	Gasoline Service Stations	\$12,992,280	\$1,800,000	-\$11,192,280	-86%
555	Boat Dealers	\$1,249,013	\$0	-\$1,249,013	-100%
556	Recreational Vehicle Dealers	\$1,838,463	\$0	-\$1,838,463	-100%
557	Motorcycle Dealers	\$1,778,774	\$0	-\$1,778,774	-100%
559	Automotive Dealers, NEC	\$2,715,398	\$0	-\$2,715,398	-100%
561	Men's and Boys' Clothing Stores	\$1,121,242	\$0	-\$1,121,242	-100%
562	Women's Clothing Stores	\$1,817,213	\$200,000	-\$1,617,213	-89%
563	Women's Accessory and Specialty Stores	\$271,919	\$0	-\$271,919	-100%
564	Children's and Infants' Wear	\$475,892	\$0	-\$475,892	-100%
565	Family Clothing Stores	\$1,904,379	\$0	-\$1,904,379	-100%

Summary Table (continued)

566	Shoe Stores	\$2,369,036	\$0	-\$2,369,036	-100%
569	Miscellaneous Apparel and Accessory Stores	\$1,312,492	\$0	-\$1,312,492	-100%
571	Home Furniture and Furnishing	\$11,790,910	\$0	-\$11,790,910	-100%
572	Household Appliance Stores	\$2,518,869	\$0	-\$2,518,869	-100%
573	Radio, TV, and Computer Stores	\$27,009,150	\$1,400,000	-\$25,609,150	-95%
5812	Eating Places	\$51,825,500	\$4,500,000	-\$47,325,500	-91%
5813	Drinking Places	\$1,756,712	\$0	-\$1,756,712	-100%
591	Drug Stores and Proprietary	\$9,936,607	\$300,000	-\$9,636,607	-97%
592	Liquor Stores	\$1,117,723	\$200,000	-\$917,723	-82%
593	Used Merchandise Stores	\$2,411,130	\$0	-\$2,411,130	-100%
5941	Sporting Goods, Bicycle and Gun Stores	\$1,851,592	\$0	-\$1,851,592	-100%
5942	Book Stores	\$890,199	\$100,000	-\$790,199	-89%
5943	Stationery Stores	\$2,874,976	\$0	-\$2,874,976	-100%
5944	Jewelry Stores	\$1,326,433	\$0	-\$1,326,433	-100%
5945	Hobby, Toy and Game Shops	\$1,632,595	\$100,000	-\$1,532,595	-94%
5946	Camera and Photography Supply Stores	\$110,446	\$0	-\$110,446	-100%
5947	Gift, Novelty and Souvenir Shops	\$1,790,685	\$0	-\$1,790,685	-100%
5948	Luggage and Leather Goods Stores	\$61,855	\$0	-\$61,855	-100%
5949	Sewing, Needlework and Craft Stores	\$204,108	\$0	-\$204,108	-100%
596	Non-store Retailers	\$4,580,525	\$0	-\$4,580,525	-100%
598	Fuel and Ice Dealers	\$298,854	\$0	-\$298,854	-100%
5992	Florists	\$837,683	\$100,000	-\$737,683	-88%
5993	Tobacco Stores and Strands	\$164,992	\$0	-\$164,992	-100%
5994	News Dealers and Newsstands	\$216,967	\$0	-\$216,967	-100%
5995	Optical Goods Stores	\$797,484	\$0	-\$797,484	-100%
5999	Miscellaneous Retail Stores, NEC	\$14,645,850	\$400,000	-\$14,245,850	-97%
	TOTALS	\$380,559,700	\$11,700,000	-\$368,859,700	LEAKAGE

Leakage Summary

SIC	RETAIL SECTOR	LEAKAGE AMOUNT
521	Lumber and Other Building Materials	-\$11,728,920
523	Paint, Glass and Wallpaper	-\$3,155,828
525	Hardware Stores	-\$6,678,120
526	Retail Nurseries and Garden	-\$4,556,433
527	Mobile Home Dealers	-\$1,304,371
53	General Merchandise Stores	-\$40,169,340
541	Grocery Stores	-\$47,987,030
542	Meat and Fish Markets.	-\$2,041,624
543	Fruit and Vegetable Markets	-\$1,023,113
544	Candy, Nut and Confection Stores	-\$205,191
545	Dairy Products Stores	-\$59,960
546	Retail Bakeries	-\$586,473
549	Miscellaneous Food Stores.	-\$3,526,552
551	New and Used Car Dealers.	-\$59,923,910
552	Used Car Dealers	-\$11,259,120
553	Auto and Home Supply Stores	-\$13,255,800
554	Gasoline Service Stations	-\$11,192,280
555	Boat Dealers	-\$1,249,013
556	Recreational Vehicle Dealers	-\$1,838,463
557	Motorcycle Dealers	-\$1,778,774
559	Automotive Dealers, NEC	-\$2,715,398
561	Men's and Boys' Clothing Stores	-\$1,121,242
562	Women's Clothing Stores	-\$1,617,213
563	Women's Accessory and Specialty Stores	-\$271,919
564	Children's and Infants' Wear	-\$475,892
565	Family Clothing Stores.	-\$1,904,379
566	Shoe Stores.	-\$2,369,036
569	Miscellaneous Apparel and Accessory Stores	-\$1,312,492
571	Home Furniture and Furnishing	-\$11,790,910
572	Household Appliance Stores	-\$2,518,869
573	Radio, TV, and Computer Stores	-\$25,609,150
5812	Eating Places	-\$47,325,500
5813	Drinking Places	-\$1,756,712
591	Drug Stores and Proprietary	-\$9,636,607
592	Liquor Stores	-\$917,723
593	Used Merchandise Stores	-\$2,411,130
5941	Sporting Goods, Bicycle and Gun Stores	-\$1,851,592
5942	Book Stores.	-\$790,199
5943	Stationery Stores	-\$2,874,976
5944	Jewelry Stores	-\$1,326,433
5945	Hobby, Toy and Game Shops.	-\$1,532,595
5946	Camera and Photography Supply Stores	-\$110,446
5947	Gift, Novelty and Souvenir Shops.	-\$1,790,685
5948	Luggage and Leather Goods Stores	-\$61,855
5949	Sewing, Needlework and Craft Stores.	-\$204,108
596	Non-store Retailers	-\$4,580,525
598	Fuel and Ice Dealers	-\$298,854
5992	Florists	-\$737,683
5993	Tobacco Stores and Stands	-\$164,992
5994	News Dealers and Newsstands.	-\$216,967
5995	Optical Goods Stores	-\$797,484
5999	Miscellaneous Retail Stores, NEC	-\$14,245,850

Surplus Summary

SIC	RETAIL SECTOR	SURPLUS AMOUNT
	(none)	(none)

Retail Trade Area Demographics

Fulshear, Texas

DESCRIPTION	DATA	%
Population		
2016 Projection	27,059	
2011 Estimate	23,386	
2000 Census	10,082	
1990 Census	6,936	
Growth 2011-2016	15.71%	
Growth 2000-2011	131.96%	
Growth 1990-2000	45.36%	
2011 Est. Pop by Single Race Class	23,386	
White Alone	16,682	71.33
Black or African American Alone	2,814	12.03
Amer. Indian and Alaska Native Alone	139	0.59
Asian Alone	417	1.78
Native Hawaiian and Other Pac. Isl. Alone	9	0.04
Some Other Race Alone	2,604	11.13
Two or More Races	720	3.08
2011 Est. Pop Hisp or Latino by Origin	23,386	
Not Hispanic or Latino	18,674	79.85
Hispanic or Latino:	4,712	20.15
Mexican	3,861	81.94
Puerto Rican	57	1.21
Cuban	34	0.72
All Other Hispanic or Latino	761	16.15
2011 Est. Hisp or Latino by Single Race Class	4,712	
White Alone	1,880	39.90
Black or African American Alone	27	0.57
American Indian and Alaska Native Alone	22	0.47
Asian Alone	1	0.02
Native Hawaiian and Other Pacific Islander Alone	0	0.00
Some Other Race Alone	2,582	54.80
Two or More Races	200	4.24

Retail Trade Area Demographics

Fulshear, Texas

DESCRIPTION	DATA	%
2011 Est. Pop. Asian Alone Race by Cat	417	
Chinese, except Taiwanese	52	12.47
Filipino	68	16.31
Japanese	22	5.28
Asian Indian	91	21.82
Korean	2	0.48
Vietnamese	81	19.42
Cambodian	19	4.56
Hmong	0	0.00
Laotian	10	2.40
Thai	4	0.96
All Other Asian Races Including 2+ Category	69	16.55
2011 Est. Population by Ancestry	23,386	
Pop, Arab	187	0.80
Pop, Czech	603	2.58
Pop, Danish	129	0.55
Pop, Dutch	135	0.58
Pop, English	1,689	7.22
Pop, French (except Basque)	431	1.84
Pop, French Canadian	80	0.34
Pop, German	2,839	12.14
Pop, Greek	126	0.54
Pop, Hungarian	27	0.12
Pop, Irish	1,014	4.34
Pop, Italian	499	2.13
Pop, Lithuanian	7	0.03
Pop, United States or American	1,464	6.26
Pop, Norwegian	55	0.24
Pop, Polish	265	1.13
Pop, Portuguese	4	0.02
Pop, Russian	33	0.14
Pop, Scottish	326	1.39
Pop, Scotch-Irish	383	1.64
Pop, Slovak	5	0.02
Pop, Subsaharan African	223	0.95
Pop, Swedish	57	0.24
Pop, Swiss	38	0.16
Pop, Ukrainian	58	0.25
Pop, Welsh	117	0.50
Pop, West Indian (exc Hisp groups)	102	0.44
Pop, Other ancestries	10,066	43.04

Retail Trade Area Demographics

Fulshear, Texas

DESCRIPTION	DATA	%
2011 Est. Population by Ancestry		
Pop, Ancestry Unclassified	2,426	10.37
2011 Est. Pop Age 5+ by Language Spoken At Home	21,735	
Speak Only English at Home	17,078	78.57
Speak Asian/Pac. Isl. Lang. at Home	26	0.12
Speak IndoEuropean Language at Home	1,245	5.73
Speak Spanish at Home	3,319	15.27
Speak Other Language at Home	68	0.31
2011 Est. Population by Sex	23,386	
Male	11,562	49.44
Female	11,824	50.56
2011 Est. Population by Age	23,386	
Age 0 - 4	1,651	7.06
Age 5 - 9	1,708	7.30
Age 10 - 14	1,691	7.23
Age 15 - 17	1,231	5.26
Age 18 - 20	967	4.13
Age 21 - 24	1,099	4.70
Age 25 - 34	2,463	10.53
Age 35 - 44	2,896	12.38
Age 45 - 54	4,028	17.22
Age 55 - 64	3,066	13.11
Age 65 - 74	1,630	6.97
Age 75 - 84	740	3.16
Age 85 and over	218	0.93
Age 16 and over	17,919	76.62
Age 18 and over	17,106	73.15
Age 21 and over	16,139	69.01
Age 65 and over	2,588	11.07
2011 Est. Median Age	38.05	
2011 Est. Average Age	37.10	

Retail Trade Area Demographics

Fulshear, Texas

DESCRIPTION	DATA	%
2011 Est. Male Population by Age	11,562	
Age 0 - 4	837	7.24
Age 5 - 9	867	7.50
Age 10 - 14	843	7.29
Age 15 - 17	596	5.15
Age 18 - 20	512	4.43
Age 21 - 24	519	4.49
Age 25 - 34	1,282	11.09
Age 35 - 44	1,476	12.77
Age 45 - 54	1,926	16.66
Age 55 - 64	1,519	13.14
Age 65 - 74	778	6.73
Age 75 - 84	324	2.80
Age 85 and over	84	0.73
2011 Est. Median Age, Male	37.21	
2011 Est. Average Age, Male	36.50	
2011 Est. Female Population by Age	11,824	
Age 0 - 4	813	6.88
Age 5 - 9	841	7.11
Age 10 - 14	848	7.17
Age 15 - 17	635	5.37
Age 18 - 20	455	3.85
Age 21 - 24	580	4.91
Age 25 - 34	1,181	9.99
Age 35 - 44	1,420	12.01
Age 45 - 54	2,102	17.78
Age 55 - 64	1,547	13.08
Age 65 - 74	852	7.21
Age 75 - 84	416	3.52
Age 85 and over	134	1.13
2011 Est. Median Age, Female	38.94	
2011 Est. Average Age, Female	37.70	

Retail Trade Area Demographics

Fulshear, Texas

DESCRIPTION	DATA	%
2011 Est. Pop Age 15+ by Marital Status	18,337	
Total, Never Married	4,422	24.12
Males, Never Married	2,554	13.93
Females, Never Married	1,868	10.19
Married, Spouse present	10,487	57.19
Married, Spouse absent	707	3.86
Widowed	773	4.22
Males Widowed	127	0.69
Females Widowed	645	3.52
Divorced	1,948	10.62
Males Divorced	664	3.62
Females Divorced	1,284	7.00
2011 Est. Pop. Age 25+ by Edu. Attainment	15,040	
Less than 9th grade	677	4.50
Some High School, no diploma	1,002	6.66
High School Graduate (or GED)	4,348	28.91
Some College, no degree	3,907	25.98
Associate Degree	764	5.08
Bachelor's Degree	3,262	21.69
Master's Degree	836	5.56
Professional School Degree	130	0.86
Doctorate Degree	114	0.76
2011 Est Pop Age 25+ by Edu. Attain, Hisp. or Lat	2,424	
Less than 9th grade	568	23.43
Some High School, no diploma	395	16.30
High School Graduate (or GED)	673	27.76
Some College, no degree	389	16.05
Associate Degree	80	3.30
Bachelor's Degree	250	10.31
Graduate or Professional Degree	70	2.89

Retail Trade Area Demographics

Fulshear, Texas

DESCRIPTION	DATA	%
Households		
2016 Projection	9,205	
2011 Estimate	7,788	
2000 Census	3,430	
1990 Census	2,289	
Growth 2011-2016	18.19%	
Growth 2000-2011	127.06%	
Growth 1990-2000	49.85%	
2011 Est. Households by Household Type	7,788	
Family Households	6,230	79.99
Nonfamily Households	1,558	20.01
2011 Est. Group Quarters Population	204	
2011 HHs by Ethnicity, Hispanic/Latino	1,202	15.43
2011 Est. HHs by HH Income	7,788	
Income Less than \$15,000	610	7.83
Income \$15,000 - \$24,999	530	6.81
Income \$25,000 - \$34,999	506	6.50
Income \$35,000 - \$49,999	866	11.12
Income \$50,000 - \$74,999	1,262	16.20
Income \$75,000 - \$99,999	1,063	13.65
Income \$100,000 - \$124,999	814	10.45
Income \$125,000 - \$149,999	676	8.68
Income \$150,000 - \$199,999	693	8.90
Income \$200,000 - \$499,999	663	8.51
Income \$500,000 and more	104	1.34
2011 Est. Average Household Income	\$102,496	
2011 Est. Median Household Income	\$77,797	
2011 Est. Per Capita Income	\$34,309	

Retail Trade Area Demographics

Fulshear, Texas

DESCRIPTION	DATA	%
2011 Median HH Inc by Single Race Class. or Ethn		
White Alone	91,602	
Black or African American Alone	46,440	
American Indian and Alaska Native Alone	38,952	
Asian Alone	93,663	
Native Hawaiian and Other Pacific Islander Alone	75,000	
Some Other Race Alone	35,325	
Two or More Races	77,808	
Hispanic or Latino	41,819	
Not Hispanic or Latino	86,881	
2011 Est. Family HH Type, Presence Own Children	6,230	
Married-Couple Family, own children	2,353	37.77
Married-Couple Family, no own children	2,752	44.17
Male Householder, own children	199	3.19
Male Householder, no own children	167	2.68
Female Householder, own children	469	7.53
Female Householder, no own children	289	4.64
2011 Est. Households by Household Size	7,788	
1-person household	1,131	14.52
2-person household	2,422	31.10
3-person household	1,536	19.72
4-person household	1,570	20.16
5-person household	734	9.42
6-person household	249	3.20
7 or more person household	146	1.87
2011 Est. Average Household Size	2.98	

Retail Trade Area Demographics

Fulshear, Texas

DESCRIPTION	DATA	%
2011 Est. Households by Presence of People	7,788	
Households with 1 or more People under Age 18:	3,394	43.58
Married-Couple Family	2,560	75.43
Other Family, Male Householder	262	7.72
Other Family, Female Householder	558	16.44
Nonfamily, Male Householder	9	0.27
Nonfamily, Female Householder	5	0.15
Households no People under Age 18:	4,394	56.42
Married-Couple Family	2,596	59.08
Other Family, Male Householder	115	2.62
Other Family, Female Householder	212	4.82
Nonfamily, Male Householder	622	14.16
Nonfamily, Female Householder	849	19.32
2011 Est. Households by Number of Vehicles	7,788	
No Vehicles	192	2.47
1 Vehicle	1,992	25.58
2 Vehicles	3,556	45.66
3 Vehicles	1,454	18.67
4 Vehicles	495	6.36
5 or more Vehicles	100	1.28
2011 Est. Average Number of Vehicles	2.06	
Family Households		
2016 Projection	7,389	
2011 Estimate	6,230	
2000 Census	2,689	
1990 Census	1,795	
Growth 2011-2016	18.60%	
Growth 2000-2011	131.68%	
Growth 1990-2000	49.81%	
2011 Est. Families by Poverty Status	6,230	
2011 Families at or Above Poverty	5,854	93.96
2011 Families at or Above Poverty with Children	2,747	44.09
2011 Families Below Poverty	376	6.04
2011 Families Below Poverty with Children	338	5.43

Retail Trade Area Demographics

Fulshear, Texas

DESCRIPTION	DATA	%
2011 Est. Pop Age 16+ by Employment Status	17,919	
In Armed Forces	78	0.44
Civilian - Employed	11,569	64.56
Civilian - Unemployed	591	3.30
Not in Labor Force	5,681	31.70
2011 Est. Civ Employed Pop 16+ Class of Worker	11,744	
For-Profit Private Workers	8,626	73.45
Non-Profit Private Workers	408	3.47
Local Government Workers	881	7.50
State Government Workers	487	4.15
Federal Government Workers	306	2.61
Self-Emp Workers	1,558	13.27
Unpaid Family Workers	16	0.14
2011 Est. Civ Employed Pop 16+ by Occupation	11,744	
Architect/Engineer	384	3.27
Arts/Entertain/Sports	226	1.92
Building Grounds Maint	487	4.15
Business/Financial Ops	567	4.83
Community/Soc Svcs	161	1.37
Computer/Mathematical	235	2.00
Construction/Extraction	808	6.88
Edu/Training/Library	565	4.81
Farm/Fish/Forestry	63	0.54
Food Prep/Serving	495	4.21
Health Practitioner/Tec	266	2.26
Healthcare Support	246	2.09
Maintenance Repair	358	3.05
Legal	141	1.20
Life/Phys/Soc Science	169	1.44
Management	1,381	11.76
Office/Admin Support	1,928	16.42
Production	436	3.71
Protective Svcs	269	2.29
Sales/Related	1,112	9.47
Personal Care/Svc	727	6.19
Transportation/Moving	720	6.13

Retail Trade Area Demographics

Fulshear, Texas

DESCRIPTION	DATA	%
2011 Est. Pop 16+ by Occupation Classification	11,744	
Blue Collar	2,323	19.78
White Collar	7,135	60.75
Service and Farm	2,286	19.47
2011 Est. Workers Age 16+, Transp. To Work	11,558	
Drove Alone	9,410	81.42
Car Pooled	1,279	11.07
Public Transportation	98	0.85
Walked	108	0.93
Bicycle	3	0.03
Other Means	94	0.81
Worked at Home	567	4.91
2011 Est. Workers Age 16+ by Travel Time to Work *		
Less than 15 Minutes	1,723	
15 - 29 Minutes	3,305	
30 - 44 Minutes	3,048	
45 - 59 Minutes	1,282	
60 or more Minutes	1,786	
2011 Est. Avg Travel Time to Work in Minutes	34.71	
2011 Est. Tenure of Occupied Housing Units	7,788	
Owner Occupied	6,388	82.02
Renter Occupied	1,400	17.98
2011 Owner Occ. HUs: Avg. Length of Residence	9.39	
2011 Renter Occ. HUs: Avg. Length of Residence	6.30	

Retail Trade Area Demographics

Fulshear, Texas

DESCRIPTION	DATA	%
2011 Est. All Owner-Occupied Housing Values	6,388	
Value Less than \$20,000	179	2.80
Value \$20,000 - \$39,999	228	3.57
Value \$40,000 - \$59,999	236	3.69
Value \$60,000 - \$79,999	262	4.10
Value \$80,000 - \$99,999	220	3.44
Value \$100,000 - \$149,999	828	12.96
Value \$150,000 - \$199,999	753	11.79
Value \$200,000 - \$299,999	1,426	22.32
Value \$300,000 - \$399,999	1,231	19.27
Value \$400,000 - \$499,999	505	7.91
Value \$500,000 - \$749,999	336	5.26
Value \$750,000 - \$999,999	105	1.64
Value \$1,000,000 or more	78	1.22
2011 Est. Median All Owner-Occupied Housing Value	\$234,174	
2011 Est. Housing Units by Units in Structure	8,109	
1 Unit Attached	63	0.78
1 Unit Detached	6,926	85.41
2 Units	48	0.59
3 or 4 Units	295	3.64
5 to 19 Units	160	1.97
20 to 49 Units	6	0.07
50 or More Units	8	0.10
Mobile Home or Trailer	599	7.39
Boat, RV, Van, etc.	5	0.06
2011 Est. Housing Units by Year Structure Built	8,109	
Housing Unit Built 2000 or later	4,541	56.00
Housing Unit Built 1990 to 1999	1,072	13.22
Housing Unit Built 1980 to 1989	901	11.11
Housing Unit Built 1970 to 1979	651	8.03
Housing Unit Built 1960 to 1969	359	4.43
Housing Unit Built 1950 to 1959	187	2.31
Housing Unit Built 1940 to 1949	211	2.60
Housing Unit Built 1939 or Earlier	186	2.29
2011 Est. Median Year Structure Built **	2000	

*This row intentionally left blank. No total category data is available.

**1939 will appear when at least half of the Housing Units in this reports area were built in 1939 or earlier.