



TheRetailCoach®

Moving Beyond Data

RETAIL GAP ANALYSIS

Retail Trade Area
Richmond, Texas



Prepared for

City of Richmond, Texas

11.16.11

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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

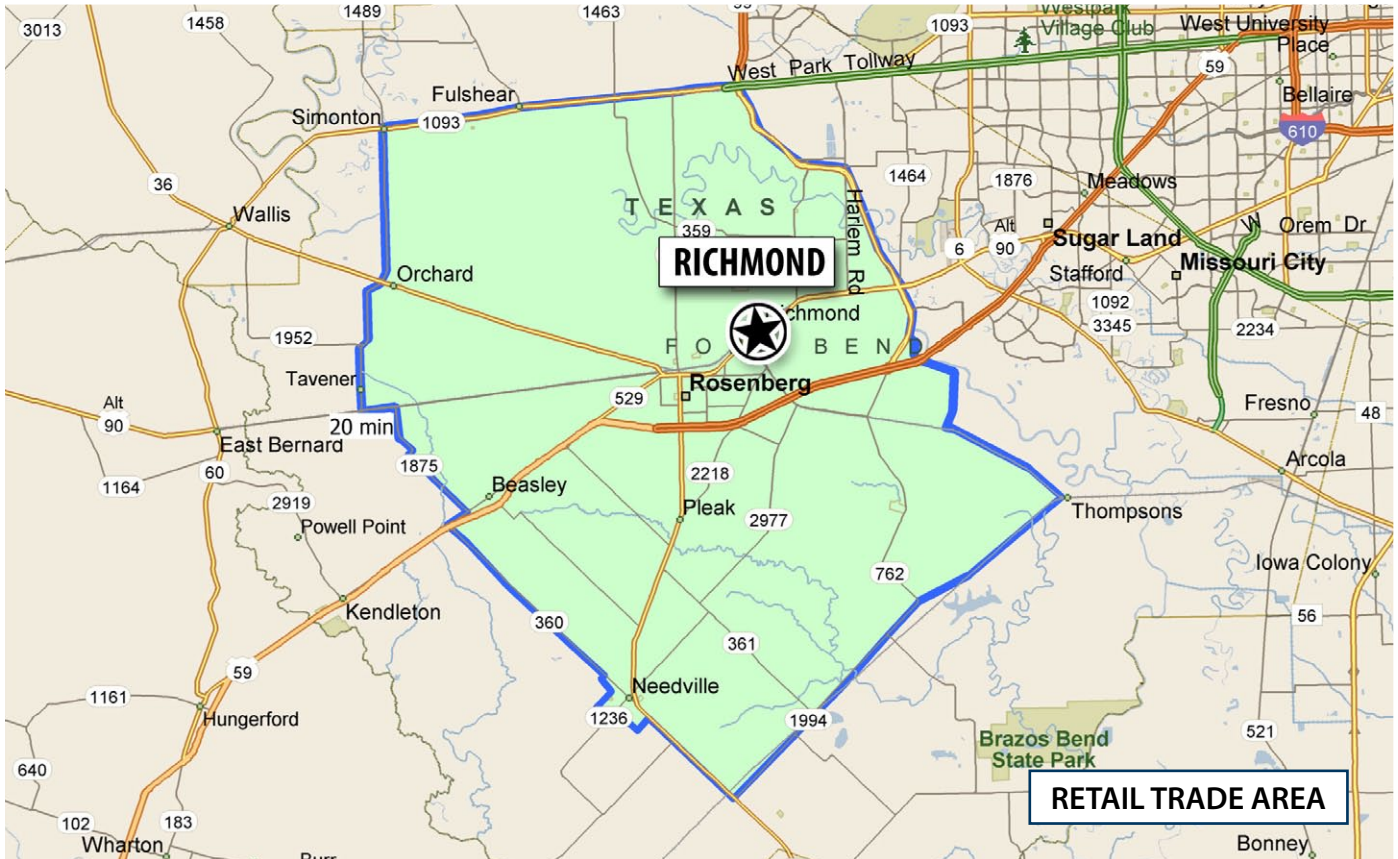
Providing more than simple data reports of psychographic and demographic trends, The Retail Coach goes well beyond other retail consulting and market research firms’ offerings by combining current national and statewide demographics and trend data with real-world, “on-the-ground” data gathered through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

2011 Retail Market Profile | Richmond, Texas



:: Retail Trade Area Map | Richmond, Texas

Demographic Profile

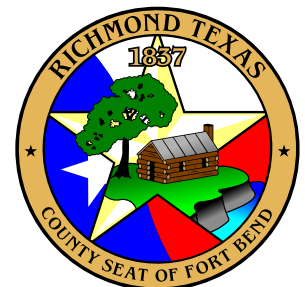
| 2011 Estimated Demographics | Richmond | RTA |
|---|----------|----------|
| Population | 13,641 | 145,743 |
| Projected Population Growth (2011-2016) | 15.15% | 17.57% |
| Race Classification | | |
| White | 44.86% | 64.92% |
| Black or African American | 13.31% | 10.25% |
| Other | 41.83% | 24.83% |
| Hispanic Origin | 66.18% | 39.24% |
| Median Household Income | \$41,957 | \$66,589 |
| Per Capita Income | \$17,414 | \$28,005 |
| Median Age | 32.08 | 35.26 |
| Households | 4,017 | 45,158 |
| Projected Household Growth (2011-2016) | 19.34% | 21.75% |
| Associates Degree and Above | 18.30% | 33.26% |



For more information:

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Sources: Nielsen Claritas 2011 | TXDOT | U.S. Census Bureau | The Retail Coach, LLC



Summary Table

| SIC | RETAIL SECTOR | POTENTIAL SALES | EST. ACTUAL SALES | SURPLUS/LEAKAGE | % SURPLUS |
|-----|--|-----------------|-------------------|-----------------|-----------|
| 521 | Lumber and Other Building Materials | \$44,667,250 | \$7,522,810 | -\$37,144,440 | -83% |
| 523 | Paint, Glass and Wallpaper | \$14,381,870 | \$500,000 | -\$13,881,870 | -97% |
| 525 | Hardware Stores | \$25,889,840 | \$740,010 | -\$25,149,830 | -97% |
| 526 | Retail Nurseries and Garden | \$19,655,960 | \$1,568,010 | -\$18,087,950 | -92% |
| 527 | Mobile Home Dealers | \$5,590,119 | \$0 | -\$5,590,119 | -100% |
| 53 | General Merchandise Stores | \$179,893,200 | \$105,000,000 | -\$74,893,180 | -42% |
| 541 | Grocery Stores | \$214,476,300 | \$21,140,820 | -\$193,335,500 | -90% |
| 542 | Meat and Fish Markets | \$10,110,960 | \$1,000,000 | -\$9,110,961 | -90% |
| 543 | Fruit and Vegetable Markets | \$4,856,154 | \$0 | -\$4,856,154 | -100% |
| 544 | Candy, Nut and Confection Stores | \$939,834 | \$400,000 | -\$539,834 | -57% |
| 545 | Dairy Products Stores | \$313,278 | \$0 | -\$313,278 | -100% |
| 546 | Retail Bakeries | \$2,676,978 | \$0 | -\$2,676,978 | -100% |
| 549 | Miscellaneous Food Stores | \$17,005,140 | \$1,600,000 | -\$15,405,140 | -91% |
| 551 | New and Used Car Dealers | \$233,633,100 | \$15,400,000 | -\$218,233,100 | -93% |
| 552 | Used Car Dealers | \$52,383,520 | \$1,000,000 | -\$51,383,520 | -98% |
| 553 | Auto and Home Supply Stores | \$62,167,440 | \$4,000,000 | -\$58,167,440 | -94% |
| 554 | Gasoline Service Stations | \$66,565,720 | \$12,777,070 | -\$53,788,650 | -81% |
| 555 | Boat Dealers | \$14,184,260 | \$0 | -\$14,184,260 | -100% |
| 556 | Recreational Vehicle Dealers | \$8,787,620 | \$0 | -\$8,787,620 | -100% |
| 557 | Motorcycle Dealers | \$8,124,573 | \$1,200,000 | -\$6,924,573 | -85% |
| 559 | Automotive Dealers, NEC | \$11,640,860 | \$0 | -\$11,640,860 | -100% |
| 561 | Men's and Boys' Clothing Stores | \$5,395,267 | \$0 | -\$5,395,267 | -100% |
| 562 | Women's Clothing Stores | \$8,847,522 | \$52,688 | -\$8,794,834 | -99% |
| 563 | Women's Accessory and Specialty Stores | \$1,306,817 | \$0 | -\$1,306,817 | -100% |
| 564 | Children's and Infants' Wear | \$2,357,503 | \$0 | -\$2,357,503 | -100% |
| 565 | Family Clothing Stores | \$9,352,209 | \$295,181 | -\$9,057,028 | -97% |

Summary Table (continued)

| | | | | | |
|------|--|------------------------|----------------------|-------------------------|----------------|
| 566 | Shoe Stores | \$11,759,290 | \$36,145 | -\$11,723,140 | -100% |
| 569 | Miscellaneous Apparel and Accessory Stores | \$5,957,790 | \$200,000 | -\$5,757,790 | -97% |
| 571 | Home Furniture and Furnishing | \$52,804,900 | \$6,254,421 | -\$46,550,480 | -88% |
| 572 | Household Appliance Stores | \$11,595,420 | \$1,500,000 | -\$10,095,420 | -87% |
| 573 | Radio, TV, and Computer Stores | \$118,672,500 | \$1,655,937 | -\$117,016,500 | -99% |
| 5812 | Eating Places | \$248,075,600 | \$11,100,000 | -\$236,975,600 | -96% |
| 5813 | Drinking Places | \$8,456,441 | \$400,000 | -\$8,056,441 | -95% |
| 591 | Drug Stores and Proprietary | \$46,657,080 | \$11,628,060 | -\$35,029,020 | -75% |
| 592 | Liquor Stores | \$5,374,611 | \$918,000 | -\$4,456,611 | -83% |
| 593 | Used Merchandise Stores | \$10,464,170 | \$400,000 | -\$10,064,170 | -96% |
| 5941 | Sporting Goods, Bicycle and Gun Stores | \$8,397,916 | \$1,147,025 | -\$7,250,891 | -86% |
| 5942 | Book Stores | \$4,096,712 | \$601,000 | -\$3,495,712 | -85% |
| 5943 | Stationery Stores | \$13,417,250 | \$8,900,000 | -\$4,517,250 | -34% |
| 5944 | Jewelry Stores | \$6,109,954 | \$1,139,209 | -\$4,970,745 | -81% |
| 5945 | Hobby, Toy and Game Shops | \$6,773,002 | \$0 | -\$6,773,002 | -100% |
| 5946 | Camera and Photography Supply Stores | \$521,212 | \$0 | -\$521,212 | -100% |
| 5947 | Gift, Novelty and Souvenir Shops | \$8,150,737 | \$300,000 | -\$7,850,737 | -96% |
| 5948 | Luggage and Leather Goods Stores | \$260,950 | \$0 | -\$260,950 | -100% |
| 5949 | Sewing, Needlework and Craft Stores | \$982,522 | \$100,000 | -\$882,522 | -90% |
| 596 | Non-store Retailers | \$20,595,790 | \$1,600,000 | -\$18,995,790 | -92% |
| 598 | Fuel and Ice Dealers | \$1,427,997 | \$2,300,000 | \$872,003 | 61% |
| 5992 | Florists | \$3,802,025 | \$200,000 | -\$3,602,025 | -95% |
| 5993 | Tobacco Stores and Stands | \$851,015 | \$0 | -\$851,015 | -100% |
| 5994 | News Dealers and Newsstands | \$852,392 | \$0 | -\$852,392 | -100% |
| 5995 | Optical Goods Stores | \$4,486,417 | \$535,016 | -\$3,951,401 | -88% |
| 5999 | Miscellaneous Retail Stores, NEC | \$68,921,160 | \$2,800,000 | -\$66,121,160 | -96% |
| | TOTALS | \$1,694,668,000 | \$227,911,400 | -\$1,466,757,000 | LEAKAGE |

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, Claritas 2010/2011, ESRI 2010/2011, U.S. Census Bureau, Economy.com, International Council of Shopping Centers, and/or U.S. Bureau of Labor and Statistics.

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

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