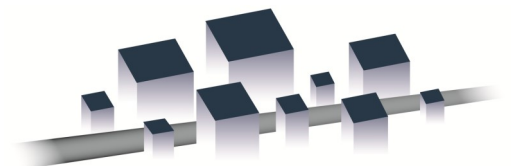


Denison, TX

RETAIL MARKET INFORMATION

10, 15, 30 Minute Drive Time

2016



RETAIL ATTRACTIONS, LLC
Economic Development Consulting

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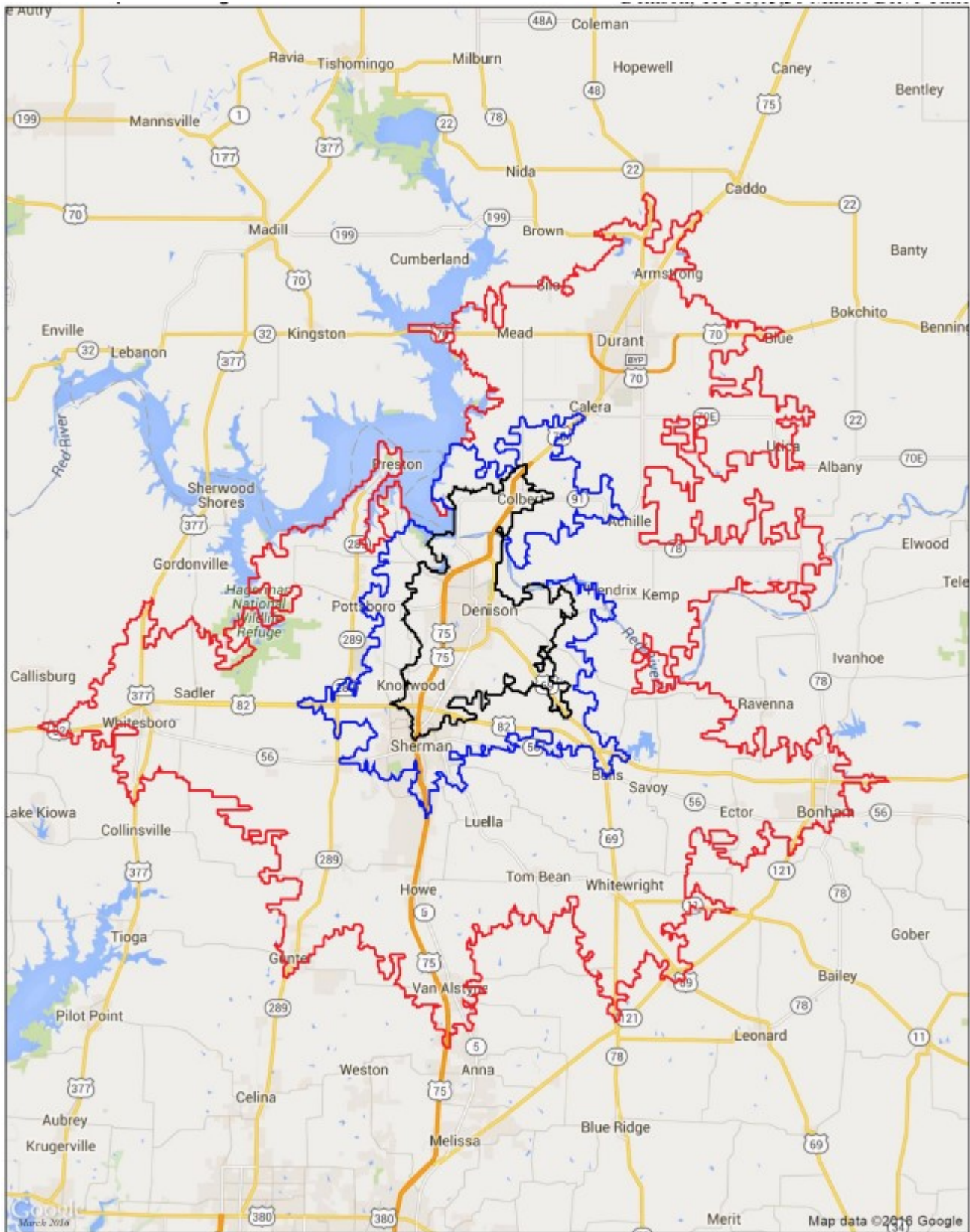
ABOUT THE CITY OF DENISON

For Information About the Denison, Texas Community visit this site:

<http://www.cityofdenison.com/177/About-Us>

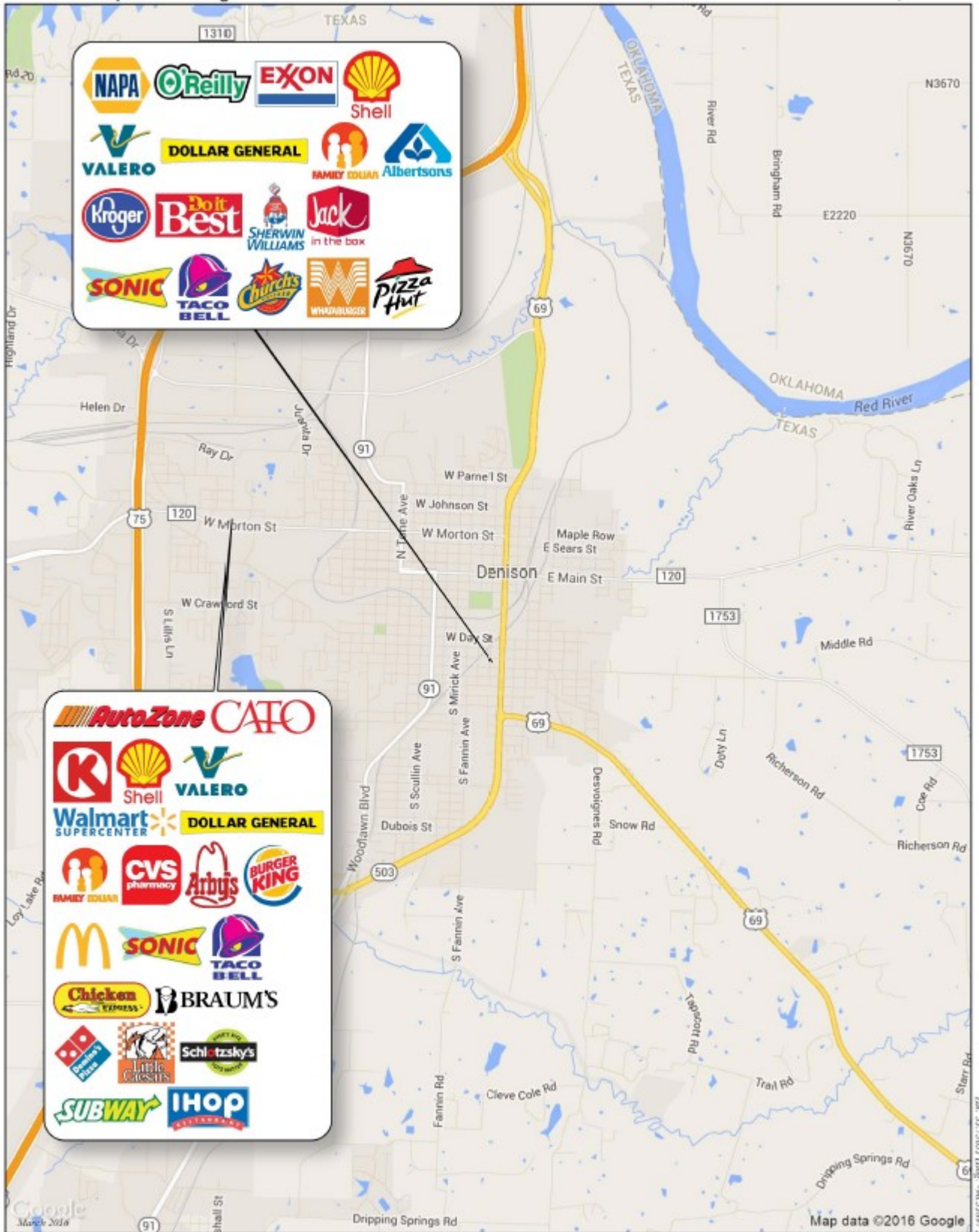
RETAIL ENVIRONMENT

Drive Time (Regis Radis Sandbox)



RETAIL ENVIRONMENT

Merchants (Regis Radis Sandbox)



This map was produced using data from private and government sources deemed to be reliable. The information herein is provided without representation or warranty.

RETAIL ENVIRONMENT

Drive Time

A category with retail leakage indicates revenue leaving a market due to an unmet demand. This is indicated when consumers from an area are spending more for goods and services than the businesses in the area are providing. Categories with retail leakage suggest that the area can support additional retailers in those categories. Denison Drive Time indicates significant leakage in several categories, some of which are highlighted below. Surplus categories in the market indicate a pull factor evident by consumers coming into the trade area from outside the community to purchase specific goods and services. Several categories in Denison Drive Time have impressive surpluses indicating a regional pull of customers if these needs were met locally.

RETAIL CATEGORY ANNUAL LEAKAGE	10 Minute
Non-Stores Retailers	\$31,037,391
Clothing & Clothing Accessories Stores	\$14,716,549
Home Centers	\$14,637,855
General Merchandise Stores	\$14,165,272
Gasoline Stations	\$13,921,040
Grocery Stores	\$6,726,839
Jewelry, Luggage, Leather Goods Stores	\$6,461,316
Lawn/Garden Equipment/Supplies Stores	\$4,451,570
TOTAL LEAKAGE	\$106,117,832

*The total leakage includes categories not listed in the table above

RETAIL ENVIRONMENT

Drive Time

A category with retail leakage indicates revenue leaving a market due to an unmet demand. This is indicated when consumers from an area are spending more for goods and services than the businesses in the area are providing. Categories with retail leakage suggest that the area can support additional retailers in those categories. Denison Drive Time indicates significant leakage in several categories, some of which are highlighted below. Surplus categories in the market indicate a pull factor evident by consumers coming into the trade area from outside the community to purchase specific goods and services. Several categories in Denison Drive Time have impressive surpluses indicating a regional pull of customers if these needs were met locally.

RETAIL CATEGORY ANNUAL LEAKAGE	15 Minute
Non-Stores Retailers	\$42,809,572
Clothing & Clothing Accessories Stores	\$10,202,747
Jewelry, Luggage, Leather Goods Stores	\$8,973,123
Lawn/Garden Equipment/Supplies Stores	\$6,496,693
Gasoline Stations	\$5,585,672
Electronics & Appliances Stores	\$3,950,397
Other Misc. Store Retailers	\$2,521,512
Convenience Stores	\$2,323,193
TOTAL LEAKAGE	\$82,862,909

*The total leakage includes categories not listed in the table above

RETAIL ENVIRONMENT

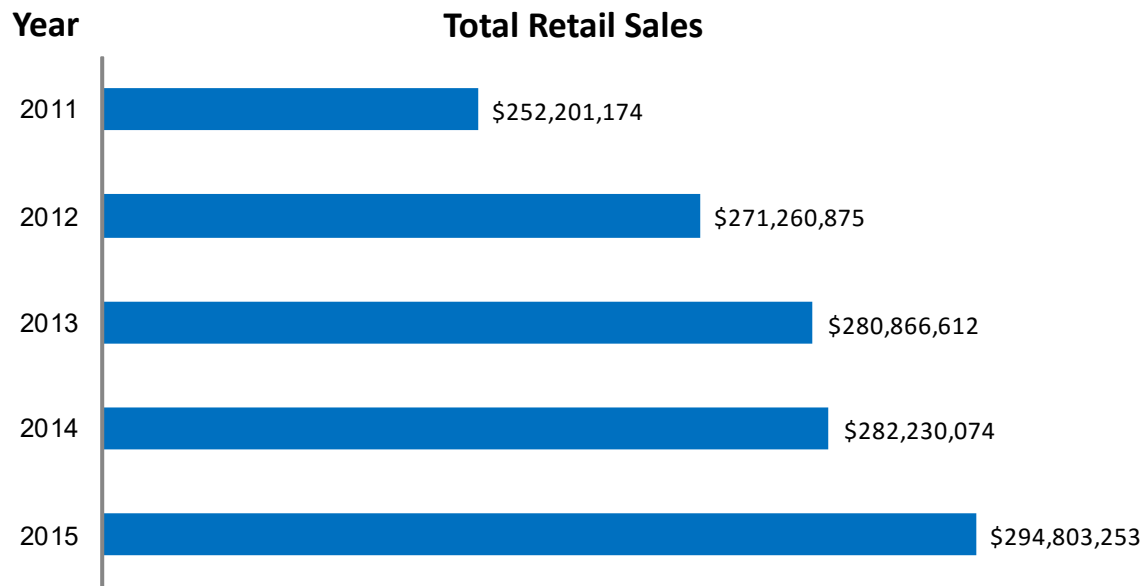
Drive Time

A category with retail leakage indicates revenue leaving a market due to an unmet demand. This is indicated when consumers from an area are spending more for goods and services than the businesses in the area are providing. Categories with retail leakage suggest that the area can support additional retailers in those categories. Denison Drive Time indicates significant leakage in several categories, some of which are highlighted below. Surplus categories in the market indicate a pull factor evident by consumers coming into the trade area from outside the community to purchase specific goods and services. Several categories in Denison Drive Time have impressive surpluses indicating a regional pull of customers if these needs were met locally.

RETAIL CATEGORY ANNUAL LEAKAGE	30 Minute
Non-Store Retailers	\$116,645,147
Grocery Stores	\$49,549,551
Clothing & Clothing Accessories Stores	\$32,881,070
Gasoline Stations	\$22,704,847
Jewelry, Luggage, Leather Goods Stores	\$22,174,684
Dept. Stores, Excluding Leased Dept. Stores	\$20,276,294
Lawn/Garden Equipment/Supplies Stores	\$17,570,230
Electronics & Appliances Stores	\$16,882,231
TOTAL LEAKAGE	\$298,684,054

*The total leakage includes categories not listed in the table above

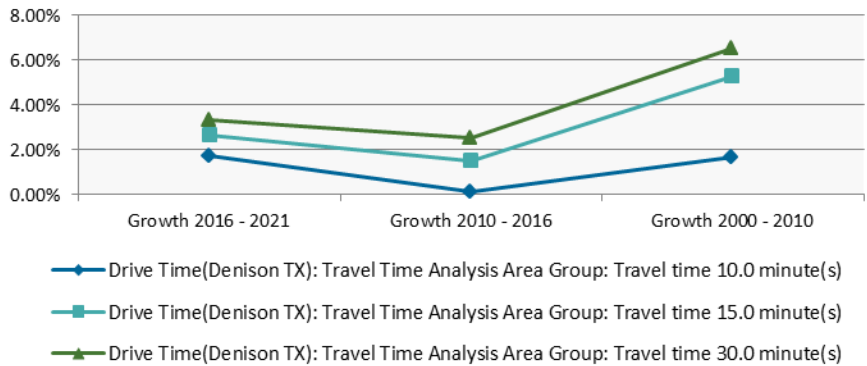
TOTAL RETAIL SALES



Sales tax revenue is an indicator of the health of the existing retailers and in the fiscal health of city government. As shown in the chart, the total retail sales in this market have shown an increase indicating fiscal health and retail market increases and growth.

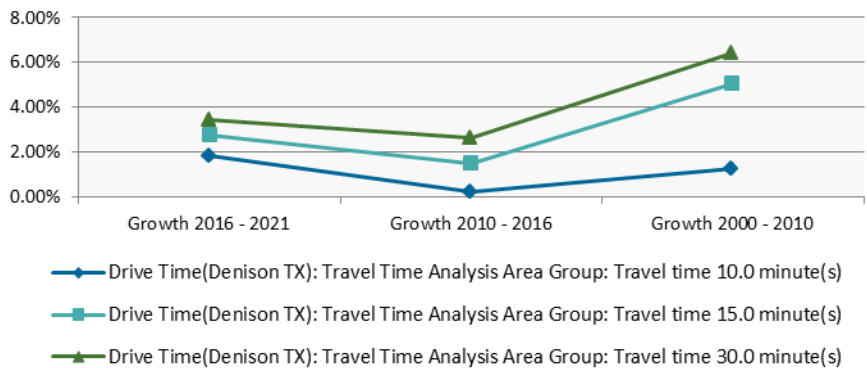
DEMOGRAPHIC SNAPSHOT

Description	Drive Time(Denison TX): Travel Time Analysis Area Group: Travel time 10.0 minute(s)		Drive Time(Denison TX): Travel Time Analysis Area Group: Travel time 15.0 minute(s)		Drive Time(Denison TX): Travel Time Analysis Area Group: Travel time 30.0 minute(s)	
	Total	%	Total	%	Total	%
Population						
2021 Projection	25,849		35,900		98,764	
2016 Estimate	25,405		34,966		95,558	
2010 Census	25,374		34,450		93,185	
2000 Census	24,955		32,725		87,451	



Growth 2016 - 2021	1.75%	2.67%	3.35%
Growth 2010 - 2016	0.12%	1.50%	2.55%
Growth 2000 - 2010	1.68%	5.27%	6.56%

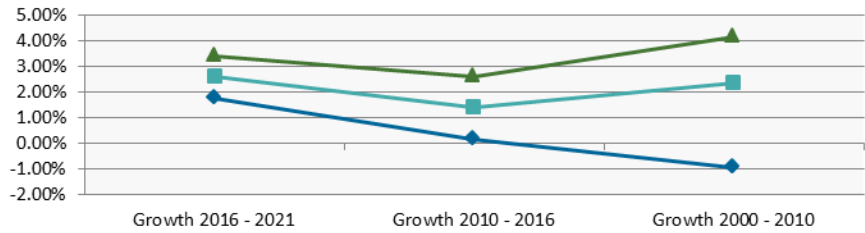
Households					
2021 Projection	10,417		14,410		38,925
2016 Estimate	10,227		14,027		37,622
2010 Census	10,204		13,818		36,655
2000 Census	10,074		13,153		34,438



Growth 2016 - 2021	1.86%	2.73%	3.46%
Growth 2010 - 2016	0.23%	1.51%	2.64%
Growth 2000 - 2010	1.29%	5.05%	6.44%

DEMOGRAPHIC SNAPSHOT

Description	Drive Time(Denison TX): Travel Time Analysis Area Group: Travel time 10.0 minute(s)		Drive Time(Denison TX): Travel Time Analysis Area Group: Travel time 15.0 minute(s)		Drive Time(Denison TX): Travel Time Analysis Area Group: Travel time 30.0 minute(s)	
	Total	%	Total	%	Total	%
Family Households						
2021 Projection	6,916		9,620		26,094	
2016 Estimate	6,797		9,373		25,227	
2010 Census	6,785		9,241		24,581	
2000 Census	6,847		9,028		23,600	

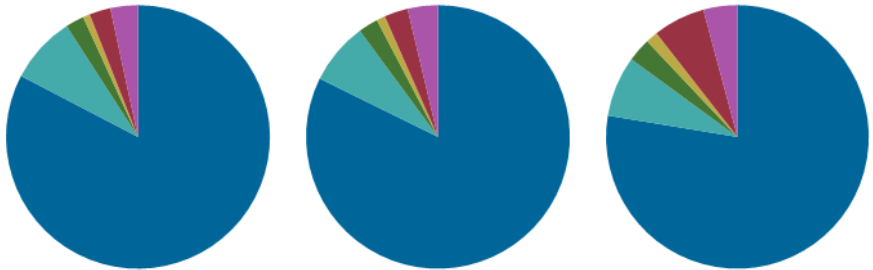


	Drive Time(Denison TX): Travel Time Analysis Area Group: Travel time 10.0 minute(s)	Drive Time(Denison TX): Travel Time Analysis Area Group: Travel time 15.0 minute(s)	Drive Time(Denison TX): Travel Time Analysis Area Group: Travel time 30.0 minute(s)
Growth 2016 - 2021	1.76%	2.63%	3.44%
Growth 2010 - 2016	0.18%	1.44%	2.63%
Growth 2000 - 2010	-0.92%	2.36%	4.16%

DEMOGRAPHIC SNAPSHOT

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	Total	%	Total	%	Total	%
2016 Est. Population by Single-Classification Race	25,405		34,966		95,558	

- White Alone
- Black or African American Alone
- Amer. Indian and Alaska Native Alone
- Asian Alone
- Native Hawaiian and Other Pac. Isl. Alone
- Some Other Race Alone
- Two or More Races



White Alone	20,998	82.65%	28,775	82.29%	74,145	77.59%
Black or African American Alone	2,095	8.25%	2,658	7.60%	7,111	7.44%
Amer. Indian and Alaska Native Alone	578	2.27%	852	2.44%	2,774	2.90%
Asian Alone	199	0.79%	352	1.01%	1,365	1.43%
Native Hawaiian and Other Pac. Isl. Alone	17	0.07%	18	0.05%	45	0.05%
Some Other Race Alone	662	2.61%	1,012	2.89%	6,123	6.41%
Two or More Races	856	3.37%	1,299	3.72%	3,995	4.18%

2016 Est. Population by Hispanic or Latino Origin	25,405		34,966		95,558	
Not Hispanic or Latino	22,964	90.39%	31,562	90.26%	82,317	86.14%
Hispanic or Latino	2,441	9.61%	3,404	9.74%	13,241	13.86%
Mexican	2,115	86.64%	2,950	86.64%	11,084	83.71%
Puerto Rican	86	3.54%	98	2.89%	215	1.63%
Cuban	13	0.52%	16	0.48%	50	0.38%
All Other Hispanic or Latino	227	9.29%	340	9.99%	1,892	14.29%

2016 Est. Hisp. or Latino Pop by Single-Class. Race	2,441		3,404		13,241	
White Alone	1,525	62.46%	2,031	59.67%	5,884	44.44%
Black or African American Alone	44	1.79%	51	1.50%	159	1.20%
American Indian and Alaska Native Alone	69	2.82%	87	2.55%	229	1.73%
Asian Alone	0	0.00%	3	0.10%	16	0.12%
Native Hawaiian and Other Pacific Islander Alone	1	0.04%	1	0.03%	3	0.02%
Some Other Race Alone	641	26.25%	988	29.03%	6,068	45.83%
Two or More Races	162	6.64%	243	7.13%	882	6.66%

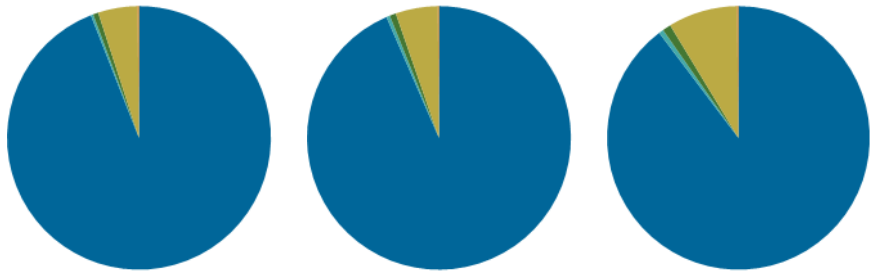
DEMOGRAPHIC SNAPSHOT

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	Total	%	Total	%	Total	%
2016 Est. Pop by Race, Asian Alone, by Category	199		352		1,365	
Chinese, except Taiwanese	10	4.80%	25	7.09%	101	7.38%
Filipino	74	37.34%	99	28.05%	196	14.35%
Japanese	3	1.52%	6	1.83%	25	1.81%
Asian Indian	60	30.15%	115	32.75%	522	38.22%
Korean	8	4.07%	25	7.22%	160	11.74%
Vietnamese	6	2.86%	14	4.10%	100	7.29%
Cambodian	0	0.00%	0	0.00%	0	0.00%
Hmong	0	0.00%	0	0.00%	0	0.00%
Laotian	0	0.00%	0	0.00%	4	0.28%
Thai	3	1.43%	5	1.55%	15	1.11%
All Other Asian Races Including 2+ Category	36	17.82%	61	17.41%	243	17.83%
2016 Est. Population by Ancestry	25,405		34,966		95,558	
Arab	22	0.09%	38	0.11%	105	0.11%
Czech	80	0.32%	112	0.32%	267	0.28%
Danish	0	0.00%	2	0.01%	14	0.01%
Dutch	381	1.50%	448	1.28%	873	0.91%
English	1,993	7.84%	2,675	7.65%	6,864	7.18%
French (except Basque)	364	1.43%	481	1.38%	1,159	1.21%
French Canadian	19	0.07%	28	0.08%	82	0.09%
German	3,277	12.90%	4,422	12.65%	10,510	11.00%
Greek	3	0.01%	20	0.06%	94	0.10%
Hungarian	5	0.02%	66	0.19%	381	0.40%
Irish	2,551	10.04%	3,578	10.23%	9,623	10.07%
Italian	319	1.25%	412	1.18%	1,024	1.07%
Lithuanian	6	0.02%	10	0.03%	27	0.03%
United States or American	2,417	9.51%	3,128	8.95%	7,137	7.47%
Norwegian	29	0.12%	44	0.13%	238	0.25%
Polish	65	0.26%	149	0.43%	442	0.46%
Portuguese	10	0.04%	10	0.03%	11	0.01%
Russian	46	0.18%	71	0.20%	160	0.17%
Scottish	335	1.32%	424	1.21%	1,148	1.20%
Scotch-Irish	198	0.78%	295	0.84%	819	0.86%
Slovak	0	0.00%	0	0.00%	1	0.00%
Subsaharan African	132	0.52%	174	0.50%	423	0.44%
Swedish	218	0.86%	316	0.90%	618	0.65%
Swiss	0	0.00%	4	0.01%	29	0.03%
Ukrainian	2	0.01%	3	0.01%	4	0.00%
Welsh	51	0.20%	68	0.19%	146	0.15%
West Indian (except Hisp. groups)	42	0.16%	54	0.15%	142	0.15%
Other ancestries	7,604	29.93%	10,676	30.53%	33,421	34.97%
Ancestry Unclassified	5,234	20.60%	7,258	20.76%	19,797	20.72%

DEMOGRAPHIC SNAPSHOT

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	Total	%	Total	%	Total	%
2016 Est. Pop Age 5+ by Language Spoken At Home	23,828		32,841		89,397	

- Speak Only English at Home
- Speak Asian/Pac. Isl. Lang. at Home
- Speak IndoEuropean Language at Home
- Speak Spanish at Home
- Speak Other Language at Home



Speak Only English at Home	22,410	94.05%	30,699	93.48%	80,181	89.69%
Speak Asian/Pac. Isl. Lang. at Home	71	0.30%	139	0.42%	512	0.57%
Speak IndoEuropean Language at Home	154	0.65%	256	0.78%	927	1.04%
Speak Spanish at Home	1,152	4.84%	1,699	5.17%	7,620	8.52%
Speak Other Language at Home	41	0.17%	49	0.15%	157	0.18%

2016 Est. Population by Sex	25,405		34,966		95,558	
Male	12,183	47.95%	16,802	48.05%	46,280	48.43%
Female	13,222	52.05%	18,164	51.95%	49,278	51.57%

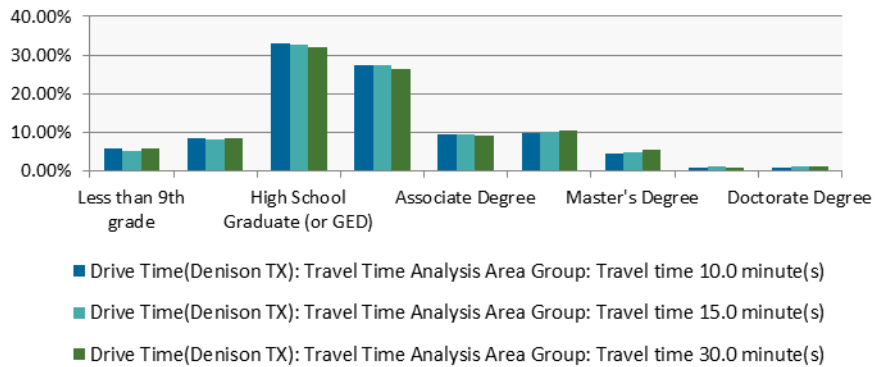
2016 Est. Population by Age	25,405		34,966		95,558	
Age 0 - 4	1,577	6.21%	2,125	6.08%	6,161	6.45%
Age 5 - 9	1,635	6.44%	2,208	6.31%	6,309	6.60%
Age 10 - 14	1,630	6.42%	2,271	6.50%	6,413	6.71%
Age 15 - 17	962	3.79%	1,317	3.77%	3,650	3.82%
Age 18 - 20	867	3.41%	1,229	3.51%	3,976	4.16%
Age 21 - 24	1,170	4.61%	1,648	4.71%	4,801	5.02%
Age 25 - 34	2,984	11.75%	4,107	11.75%	11,902	12.46%
Age 35 - 44	2,826	11.12%	3,881	11.10%	10,977	11.49%
Age 45 - 54	3,129	12.32%	4,312	12.33%	11,780	12.33%
Age 55 - 64	3,632	14.30%	4,958	14.18%	12,719	13.31%
Age 65 - 74	2,791	10.99%	3,894	11.14%	9,750	10.20%
Age 75 - 84	1,541	6.07%	2,078	5.94%	5,049	5.28%
Age 85 and over	661	2.60%	937	2.68%	2,072	2.17%
Age 16 and over	20,244	79.68%	27,925	79.86%	75,474	78.98%
Age 18 and over	19,601	77.15%	27,045	77.35%	73,025	76.42%
Age 21 and over	18,734	73.74%	25,816	73.83%	69,049	72.26%
Age 65 and over	4,992	19.65%	6,910	19.76%	16,871	17.66%
2016 Est. Median Age	41.6		41.6		39.2	
2016 Est. Average Age	41.3		41.3		39.8	

DEMOGRAPHIC SNAPSHOT

Description	Drive Time(Denison TX): Travel Time Analysis Area Group: Travel time 10.0 minute(s)		Drive Time(Denison TX): Travel Time Analysis Area Group: Travel time 15.0 minute(s)		Drive Time(Denison TX): Travel Time Analysis Area Group: Travel time 30.0 minute(s)	
	Total	%	Total	%	Total	%
2016 Est. Male Population by Age	12,183		16,802		46,280	
Age 0 - 4	814	6.68%	1,095	6.52%	3,150	6.81%
Age 5 - 9	819	6.72%	1,112	6.62%	3,195	6.90%
Age 10 - 14	824	6.77%	1,158	6.89%	3,247	7.02%
Age 15 - 17	505	4.15%	683	4.06%	1,838	3.97%
Age 18 - 20	456	3.74%	642	3.82%	1,994	4.31%
Age 21 - 24	602	4.94%	847	5.04%	2,433	5.26%
Age 25 - 34	1,447	11.88%	1,996	11.88%	5,843	12.63%
Age 35 - 44	1,391	11.41%	1,901	11.31%	5,453	11.78%
Age 45 - 54	1,495	12.27%	2,047	12.18%	5,682	12.28%
Age 55 - 64	1,735	14.24%	2,371	14.11%	6,081	13.14%
Age 65 - 74	1,270	10.42%	1,798	10.70%	4,545	9.82%
Age 75 - 84	624	5.12%	862	5.13%	2,129	4.60%
Age 85 and over	201	1.65%	291	1.73%	691	1.49%
2016 Est. Median Age, Male	39.5		39.6		37.6	
2016 Est. Average Age, Male	39.7		39.8		38.6	
2016 Est. Female Population by Age	13,222		18,164		49,278	
Age 0 - 4	762	5.77%	1,029	5.67%	3,011	6.11%
Age 5 - 9	816	6.17%	1,096	6.03%	3,114	6.32%
Age 10 - 14	805	6.09%	1,114	6.13%	3,166	6.43%
Age 15 - 17	457	3.46%	634	3.49%	1,812	3.68%
Age 18 - 20	412	3.11%	586	3.23%	1,981	4.02%
Age 21 - 24	568	4.30%	801	4.41%	2,368	4.81%
Age 25 - 34	1,537	11.63%	2,111	11.62%	6,058	12.29%
Age 35 - 44	1,435	10.85%	1,980	10.90%	5,524	11.21%
Age 45 - 54	1,634	12.36%	2,266	12.47%	6,098	12.37%
Age 55 - 64	1,897	14.35%	2,587	14.24%	6,638	13.47%
Age 65 - 74	1,521	11.50%	2,096	11.54%	5,206	10.56%
Age 75 - 84	917	6.93%	1,216	6.70%	2,920	5.93%
Age 85 and over	460	3.48%	647	3.56%	1,381	2.80%
2016 Est. Median Age, Female	43.7		43.6		40.7	
2016 Est. Average Age, Female	42.8		42.8		40.9	
2016 Est. Pop Age 15+ by Marital Status	20,563		28,362		76,675	
Total, Never Married	5,624	27.35%	7,646	26.96%	21,164	27.60%
Males, Never Married	3,127	15.20%	4,211	14.85%	11,152	14.54%
Females, Never Married	2,498	12.15%	3,435	12.11%	10,012	13.06%
Married, Spouse present	9,019	43.86%	12,821	45.20%	34,021	44.37%
Married, Spouse absent	1,096	5.33%	1,483	5.23%	4,673	6.09%
Widowed	1,628	7.92%	2,213	7.80%	5,309	6.92%
Males Widowed	233	1.13%	340	1.20%	972	1.27%
Females Widowed	1,395	6.78%	1,873	6.60%	4,337	5.66%
Divorced	3,196	15.54%	4,199	14.81%	11,508	15.01%
Males Divorced	1,496	7.28%	1,957	6.90%	5,521	7.20%
Females Divorced	1,700	8.27%	2,243	7.91%	5,987	7.81%

DEMOGRAPHIC SNAPSHOT

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	Total	%	Total	%	Total	%
2016 Est. Pop Age 25+ by Edu. Attainment	17,564		24,168		64,248	



Less than 9th grade	1,007	5.73%	1,276	5.28%	3,674	5.72%
Some High School, no diploma	1,463	8.33%	1,961	8.11%	5,471	8.52%
High School Graduate (or GED)	5,809	33.07%	7,871	32.57%	20,600	32.06%
Some College, no degree	4,811	27.39%	6,656	27.54%	17,006	26.47%
Associate Degree	1,687	9.61%	2,279	9.43%	5,857	9.12%
Bachelor's Degree	1,729	9.84%	2,448	10.13%	6,701	10.43%
Master's Degree	772	4.39%	1,150	4.76%	3,447	5.37%
Professional School Degree	144	0.82%	258	1.07%	637	0.99%
Doctorate Degree	142	0.81%	270	1.12%	854	1.33%

2016 Est. Pop Age 25+ by Edu. Attain., Hisp./Lat.	1,170		1,642		6,300	
No High School Diploma	380	32.43%	591	36.00%	2,843	45.13%
High School Graduate	246	21.04%	397	24.19%	1,724	27.37%
Some College or Associate's Degree	366	31.30%	432	26.33%	1,099	17.44%
Bachelor's Degree or Higher	178	15.22%	221	13.48%	633	10.06%

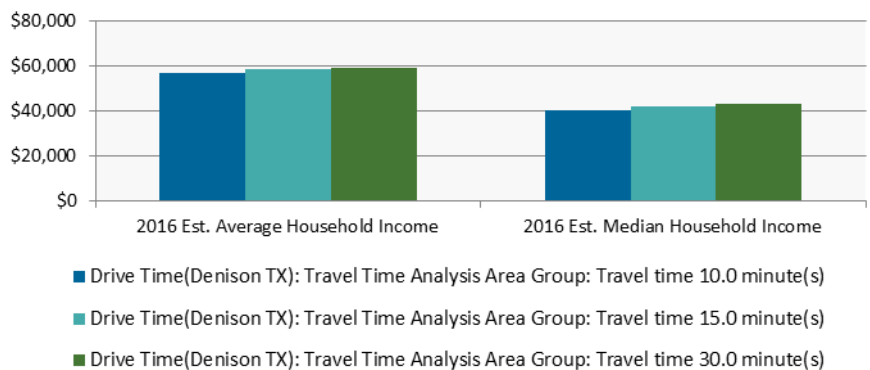
2016 Est. Households by Household Type	10,227		14,027		37,622	
Family Households	6,797	66.46%	9,373	66.83%	25,227	67.05%
Nonfamily Households	3,431	33.54%	4,653	33.17%	12,396	32.95%

2016 Est. Group Quarters Population	376		568		2,018	
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2016 HHs by Ethnicity, Hispanic/Latino	638		869		3,349	
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DEMOGRAPHIC SNAPSHOT

Description	Drive Time(Denison TX): Travel Time Analysis Area Group: Travel time 10.0 minute(s)		Drive Time(Denison TX): Travel Time Analysis Area Group: Travel time 15.0 minute(s)		Drive Time(Denison TX): Travel Time Analysis Area Group: Travel time 30.0 minute(s)	
	Total	%	Total	%	Total	%
2016 Est. Households by HH Income	10,227		14,027		37,622	
Income < \$15,000	1,918	18.75%	2,557	18.23%	6,372	16.94%
Income \$15,000 - \$24,999	1,256	12.28%	1,665	11.87%	4,286	11.39%
Income \$25,000 - \$34,999	1,409	13.77%	1,789	12.75%	4,751	12.63%
Income \$35,000 - \$49,999	1,536	15.02%	2,111	15.05%	6,127	16.29%
Income \$50,000 - \$74,999	1,688	16.50%	2,386	17.01%	6,524	17.34%
Income \$75,000 - \$99,999	1,097	10.72%	1,592	11.35%	4,237	11.26%
Income \$100,000 - \$124,999	453	4.43%	669	4.77%	2,031	5.40%
Income \$125,000 - \$149,999	317	3.10%	464	3.31%	1,210	3.22%
Income \$150,000 - \$199,999	258	2.52%	379	2.70%	1,042	2.77%
Income \$200,000 - \$249,999	110	1.07%	151	1.07%	413	1.10%
Income \$250,000 - \$499,999	137	1.34%	187	1.34%	462	1.23%
Income \$500,000+	50	0.49%	77	0.55%	167	0.44%



2016 Est. Average Household Income	\$57,185	\$58,920	\$59,098
2016 Est. Median Household Income	\$40,189	\$42,123	\$43,328

2016 Median HH Inc. by Single-Class. Race or Eth.

White Alone	\$41,776	\$43,815	\$45,036
Black or African American Alone	\$26,746	\$24,589	\$25,548
American Indian and Alaska Native Alone	\$18,467	\$20,621	\$29,265
Asian Alone	\$49,949	\$38,945	\$33,382
Native Hawaiian and Other Pacific Islander Alone	\$64,249	\$63,487	\$61,721
Some Other Race Alone	\$50,975	\$54,133	\$46,233
Two or More Races	\$39,444	\$41,947	\$42,326
Hispanic or Latino	\$40,938	\$40,251	\$39,267
Not Hispanic or Latino	\$40,097	\$42,318	\$43,997

2016 Est. Family HH Type by Presence of Own Child.

2016 Est. Family HH Type by Presence of Own Child.	6,797		9,373		25,227	
Married-Couple Family, own children	1,548	22.78%	2,186	23.32%	6,567	26.03%
Married-Couple Family, no own children	3,152	46.38%	4,437	47.33%	11,596	45.97%
Male Householder, own children	269	3.96%	353	3.77%	1,023	4.06%
Male Householder, no own children	296	4.36%	392	4.18%	975	3.87%
Female Householder, own children	789	11.60%	1,059	11.30%	2,751	10.90%
Female Householder, no own children	743	10.93%	946	10.09%	2,314	9.17%

DEMOGRAPHIC SNAPSHOT

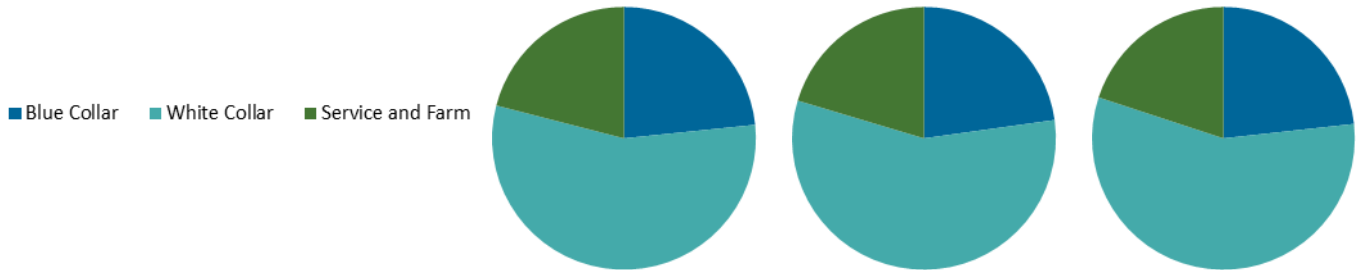
Description	Drive Time(Denison TX): Travel Time Analysis Area Group: Travel time 10.0 minute(s)		Drive Time(Denison TX): Travel Time Analysis Area Group: Travel time 15.0 minute(s)		Drive Time(Denison TX): Travel Time Analysis Area Group: Travel time 30.0 minute(s)	
	Total	%	Total	%	Total	%
2016 Est. Households by Household Size	10,227		14,027		37,622	
1-person	2,911	28.47%	3,911	27.88%	10,371	27.57%
2-person	3,535	34.56%	4,922	35.09%	13,010	34.58%
3-person	1,681	16.43%	2,305	16.43%	6,088	16.18%
4-person	1,156	11.30%	1,593	11.36%	4,462	11.86%
5-person	563	5.50%	781	5.57%	2,189	5.82%
6-person	233	2.28%	311	2.22%	909	2.42%
7-or-more-person	148	1.45%	203	1.44%	594	1.58%
2016 Est. Average Household Size	2.45		2.45		2.49	
2016 Est. Households by Presence of People Under 18	10,227		14,027		37,622	
Households with 1 or More People under Age 18:	3,165	30.95%	4,325	30.83%	12,130	32.24%
Married-Couple Family	1,791	56.58%	2,510	58.04%	7,369	60.75%
Other Family, Male Householder	334	10.54%	435	10.06%	1,248	10.29%
Other Family, Female Householder	997	31.49%	1,321	30.55%	3,376	27.83%
Nonfamily, Male Householder	30	0.96%	42	0.96%	105	0.86%
Nonfamily, Female Householder	13	0.42%	17	0.38%	33	0.27%
Households with No People under Age 18:	7,062	69.05%	9,702	69.17%	25,492	67.76%
Married-Couple Family	2,905	41.13%	4,110	42.36%	10,786	42.31%
Other Family, Male Householder	226	3.20%	303	3.12%	744	2.92%
Other Family, Female Householder	541	7.66%	691	7.12%	1,700	6.67%
Nonfamily, Male Householder	1,432	20.27%	1,979	20.40%	5,492	21.54%
Nonfamily, Female Householder	1,959	27.73%	2,620	27.00%	6,771	26.56%
2016 Est. Households by Number of Vehicles	10,227		14,027		37,622	
No Vehicles	986	9.64%	1,268	9.04%	2,972	7.90%
1 Vehicle	3,566	34.87%	4,694	33.47%	12,851	34.16%
2 Vehicles	3,662	35.80%	5,198	37.06%	14,270	37.93%
3 Vehicles	1,612	15.77%	2,266	16.16%	5,840	15.52%
4 Vehicles	334	3.27%	501	3.57%	1,396	3.71%
5 or more Vehicles	67	0.66%	99	0.71%	294	0.78%
2016 Est. Average Number of Vehicles	1.7		1.7		1.8	

DEMOGRAPHIC SNAPSHOT

Description	Drive Time(Denison TX): Travel Time Analysis Area Group: Travel time 10.0 minute(s)		Drive Time(Denison TX): Travel Time Analysis Area Group: Travel time 15.0 minute(s)		Drive Time(Denison TX): Travel Time Analysis Area Group: Travel time 30.0 minute(s)	
	Total	%	Total	%	Total	%
2016 Est. Families by Poverty Status	6,797		9,373		25,227	
2016 Families at or Above Poverty	5,754	84.66%	7,939	84.69%	21,761	86.26%
2016 Families at or Above Poverty with Children	2,175	32.00%	3,022	32.24%	9,031	35.80%
2016 Families Below Poverty	1,043	15.34%	1,435	15.31%	3,466	13.74%
2016 Families Below Poverty with Children	841	12.37%	1,131	12.06%	2,774	11.00%
2016 Est. Pop Age 16+ by Employment Status	20,244		27,925		75,474	
In Armed Forces	1	0.00%	10	0.04%	33	0.04%
Civilian - Employed	10,599	52.36%	14,616	52.34%	40,231	53.30%
Civilian - Unemployed	1,140	5.63%	1,594	5.71%	4,413	5.85%
Not in Labor Force	8,504	42.01%	11,706	41.92%	30,798	40.81%
2016 Est. Civ. Employed Pop 16+ by Class of Worker	10,745		14,811		40,691	
For-Profit Private Workers	7,872	73.26%	10,779	72.78%	29,312	72.04%
Non-Profit Private Workers	399	3.71%	546	3.69%	1,703	4.18%
Local Government Workers	701	6.52%	898	6.06%	2,745	6.74%
State Government Workers	586	5.46%	927	6.26%	2,178	5.35%
Federal Government Workers	198	1.84%	279	1.88%	925	2.27%
Self-Employed Workers	925	8.61%	1,310	8.84%	3,690	9.07%
Unpaid Family Workers	64	0.59%	72	0.48%	138	0.34%
2016 Est. Civ. Employed Pop 16+ by Occupation	10,745		14,811		40,691	
Architect/Engineer	94	0.88%	140	0.94%	418	1.03%
Arts/Entertainment/Sports	54	0.50%	123	0.83%	445	1.09%
Building Grounds Maintenance	505	4.70%	714	4.82%	1,842	4.53%
Business/Financial Operations	500	4.66%	629	4.25%	1,572	3.86%
Community/Social Services	127	1.18%	160	1.08%	552	1.36%
Computer/Mathematical	217	2.02%	276	1.86%	675	1.66%
Construction/Extraction	509	4.73%	648	4.37%	2,065	5.08%
Education/Training/Library	621	5.78%	953	6.43%	2,444	6.01%
Farming/Fishing/Forestry	39	0.37%	63	0.42%	147	0.36%
Food Prep/Serving	796	7.40%	1,062	7.17%	2,836	6.97%
Health Practitioner/Technician	694	6.46%	1,005	6.79%	2,460	6.04%
Healthcare Support	270	2.51%	343	2.32%	967	2.38%
Maintenance Repair	420	3.91%	616	4.16%	1,638	4.03%
Legal	47	0.43%	76	0.51%	267	0.66%
Life/Physical/Social Science	15	0.14%	19	0.13%	71	0.17%
Management	777	7.23%	1,163	7.85%	3,138	7.71%
Office/Admin. Support	1,457	13.56%	1,985	13.40%	5,614	13.80%
Production	857	7.97%	1,111	7.50%	2,947	7.24%
Protective Services	310	2.89%	412	2.78%	1,173	2.88%
Sales/Related	1,379	12.83%	1,896	12.80%	5,457	13.41%
Personal Care/Service	332	3.09%	421	2.85%	1,153	2.83%
Transportation/Moving	724	6.74%	998	6.74%	2,811	6.91%

DEMOGRAPHIC SNAPSHOT

Description	Drive Time(Denison TX): Travel Time Analysis Area Group: Travel time 10.0 minute(s)		Drive Time(Denison TX): Travel Time Analysis Area Group: Travel time 15.0 minute(s)		Drive Time(Denison TX): Travel Time Analysis Area Group: Travel time 30.0 minute(s)	
	Total	%	Total	%	Total	%
2016 Est. Pop 16+ by Occupation Classification	10,745		14,811		40,691	



	10.0 min	15.0 min	30.0 min
Blue Collar	2,509 23.35%	3,372 22.77%	9,461 23.25%
White Collar	5,983 55.68%	8,424 56.88%	23,112 56.80%
Service and Farm	2,253 20.97%	3,014 20.35%	8,118 19.95%

2016 Est. Workers Age 16+ by Transp. to Work	10.0 min	15.0 min	30.0 min
2016 Est. Workers Age 16+ by Transp. to Work	10,572	14,519	39,947
Drove Alone	8,650 81.82%	12,024 82.81%	32,389 81.08%
Car Pooled	1,202 11.37%	1,475 10.16%	4,476 11.20%
Public Transportation	36 0.34%	37 0.26%	90 0.23%
Walked	216 2.04%	296 2.04%	890 2.23%
Bicycle	15 0.14%	16 0.11%	45 0.11%
Other Means	182 1.72%	234 1.61%	673 1.68%
Worked at Home	271 2.57%	436 3.00%	1,385 3.47%

2016 Est. Workers Age 16+ by Travel Time to Work	10.0 min	15.0 min	30.0 min
2016 Est. Workers Age 16+ by Travel Time to Work			
Less than 15 Minutes	4,602	5,918	15,675
15 - 29 Minutes	3,638	5,271	14,462
30 - 44 Minutes	916	1,270	4,248
45 - 59 Minutes	392	585	1,596
60 or more Minutes	768	1,036	2,618
2016 Est. Avg Travel Time to Work in Minutes	23.00	23.00	23.00

2016 Est. Occupied Housing Units by Tenure	10.0 min	15.0 min	30.0 min
2016 Est. Occupied Housing Units by Tenure	10,227	14,027	37,622
Owner Occupied	6,977 68.22%	9,560 68.16%	24,876 66.12%
Renter Occupied	3,250 31.78%	4,466 31.84%	12,746 33.88%

2016 Owner Occ. HUs: Avg. Length of Residence	18.6	18.2	17.6
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2016 Renter Occ. HUs: Avg. Length of Residence	7.5	7.2	6.9
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DEMOGRAPHIC SNAPSHOT

Description	Drive Time(Denison TX): Travel Time Analysis Area Group: Travel time 10.0 minute(s)		Drive Time(Denison TX): Travel Time Analysis Area Group: Travel time 15.0 minute(s)		Drive Time(Denison TX): Travel Time Analysis Area Group: Travel time 30.0 minute(s)	
	Total	%	Total	%	Total	%
2016 Est. Owner-Occupied Housing Units by Value	6,977		9,560		24,876	
Value Less than \$20,000	225	3.22%	425	4.45%	1,224	4.92%
Value \$20,000 - \$39,999	478	6.85%	631	6.60%	1,592	6.40%
Value \$40,000 - \$59,999	945	13.54%	1,163	12.17%	2,790	11.21%
Value \$60,000 - \$79,999	1,123	16.10%	1,390	14.54%	2,993	12.03%
Value \$80,000 - \$99,999	1,166	16.72%	1,439	15.05%	3,424	13.76%
Value \$100,000 - \$149,999	1,214	17.40%	1,733	18.13%	5,250	21.10%
Value \$150,000 - \$199,999	1,011	14.49%	1,448	15.15%	3,545	14.25%
Value \$200,000 - \$299,999	473	6.78%	744	7.78%	2,193	8.81%
Value \$300,000 - \$399,999	155	2.22%	278	2.91%	1,002	4.03%
Value \$400,000 - \$499,999	112	1.61%	184	1.92%	472	1.90%
Value \$500,000 - \$749,999	51	0.73%	84	0.88%	234	0.94%
Value \$750,000 - \$999,999	11	0.16%	19	0.20%	85	0.34%
Value \$1,000,000 or more	13	0.19%	21	0.22%	73	0.29%
2016 Est. Median All Owner-Occupied Housing Value	\$92,319		\$96,263		\$103,951	
2016 Est. Housing Units by Units in Structure	11,629		15,896		42,957	
1 Unit Attached	232	1.99%	297	1.87%	718	1.67%
1 Unit Detached	9,148	78.66%	11,963	75.25%	30,360	70.68%
2 Units	432	3.71%	517	3.25%	1,358	3.16%
3 or 4 Units	298	2.56%	326	2.05%	963	2.24%
5 to 19 Units	525	4.51%	851	5.35%	3,431	7.99%
20 to 49 Units	133	1.15%	282	1.77%	1,007	2.34%
50 or More Units	213	1.83%	340	2.14%	868	2.02%
Mobile Home or Trailer	608	5.23%	1,267	7.97%	4,130	9.62%
Boat, RV, Van, etc.	41	0.35%	54	0.34%	121	0.28%
2016 Est. Housing Units by Year Structure Built	11,629		15,896		42,957	
Housing Units Built 2010 or later	155	1.34%	407	2.56%	1,483	3.45%
Housing Units Built 2000 to 2009	1,220	10.49%	2,182	13.73%	6,608	15.38%
Housing Units Built 1990 to 1999	868	7.46%	1,411	8.88%	5,288	12.31%
Housing Units Built 1980 to 1989	1,096	9.42%	1,784	11.22%	6,130	14.27%
Housing Units Built 1970 to 1979	1,723	14.81%	2,561	16.11%	7,037	16.38%
Housing Units Built 1960 to 1969	1,893	16.28%	2,283	14.36%	5,708	13.29%
Housing Units Built 1950 to 1959	1,993	17.14%	2,250	14.15%	4,519	10.52%
Housing Units Built 1940 to 1949	907	7.80%	1,028	6.47%	2,377	5.53%
Housing Unit Built 1939 or Earlier	1,774	15.26%	1,991	12.52%	3,809	8.87%
2016 Est. Median Year Structure Built	1966		1972		1977	

OPPORTUNITY GAP CATEGORY INFORMATION

Vehicle and Parts Dealers

New and used automobile dealers, motorcycle dealers, recreation vehicle dealers, all terrain vehicles dealers, boat dealers, auto parts stores, auto accessories stores and tire dealers

Furniture and Home Furnishings Stores

Furniture stores, home furnishing stores, home decorating stores and floor covering stores

Electronics and Appliance Stores

Household appliance stores, electronics stores, computer and software stores, camera and photographic equipment stores

Building Materials and Garden Supply Stores

Building material and supply dealers, home improvement centers, paint and wallpaper stores, hardware stores, lumberyards, lawn and garden stores, outdoor power equipment stores, nursery and garden centers

Food and Beverage Stores

Grocery stores, supermarkets, convenience stores, specialty food stores and beer, wine and liquor stores

Health and Personal Care Stores

Pharmacies, drug stores, cosmetic dealers, beauty supply stores, perfume stores, optical goods stores, health care stores and personal care stores

Gasoline Stations

Gasoline stations and gasoline stations with convenience stores

Clothing and Clothing Accessories Stores

Men's clothing stores, women's clothing stores, children's and infant's clothing stores, family clothing stores, clothing accessories stores, shoe stores, jewelry stores, luggage stores, leather goods stores

Sporting Goods and Hobby Stores

Sporting goods stores, hobby stores, toy stores, sewing and needlepoint stores, musical instrument and supply stores, book stores, newsstands, music stores

General Merchandise Stores

Department stores and other general merchandise stores

Miscellaneous Store Retailers

Florists, office supply stores, stationery stores, gift and souvenir stores, used merchandise stores and other miscellaneous retailers

Foodservice and Drinking Places

Full-service restaurants, limited service eating places, special foodservices, taverns and bars

ABOUT US

Retail Attractions is an economic development consulting firm specializing in market research, creating workable incentive packages and retail recruiting. Our firm believes healthy economic development is a process. Retail Attractions partners with our clients in a coordinated and strategic course of action resulting in extraordinary results. Retail Attractions believes smart, successful retail development is a vital part of a community's economic development program. We leverage our national network of relationships and our proven expertise to bring retailers, developers, landowners and communities together to grow new retail business... one relationship at a time. We partner with our client cities to achieve their community goals through retail development. Far beyond concentric rings, drive times or just another bound report, we develop actionable information and make sure the right people have access to it. In short, we make a difference for your community.

The truth is that anyone or any competent firm can pull demographics for a location based on a radius or a drive time. What makes us different is our custom approach to developing a community's trade area. We evaluate the existing retail options nearby, physical barriers to traffic, natural existing shopping patterns, and the potential draw of new shopping opportunities to develop a custom trade area for each community we serve. Your trade area is prepared by seasoned retail recruitment professionals based on criteria we know is important to the audience who will be receiving the finished marketing materials. We integrate demographic data with data we develop from other sources to create a complete picture of a community... one that will resonate with developers, brokers and retailers. We work with a community to prepare materials and get them in the hands of interested parties rather than merely deliver data that then the community has to send out on its own. We also recognize that "one size DOESN'T fit all" when it comes to trade areas. Some sites may be perfect for a grocery store, with a more localized trade area, while others may support a more regional draw. If your community has unique opportunities that require more than one trade area, we deliver what you need rather than forcing your community into our "standard offering."

Retail Attractions sends our custom marketing material, developed for each city based on the unique characteristics and demographic indicators for that city, to our network of developers, brokers and retailers. In addition, we contact retailers through our accurate, proprietary database to make sure they are aware of opportunities in your city that match their specs.

We have an extensive knowledge of various types of incentives, and their practical application, and the experience to work with city staff to develop a framework for evaluating opportunities and providing creative incentives that result in win-win scenarios for both the public and private sector. Beyond merely a list of incentive possibilities, Retail Attractions serves as an ongoing advisor to city staff, helping to craft incentives that make sense for the city, meet developer's needs and truly encourage new business development.

Retail Attractions understands municipal government and the interplay of political, financial, and regulatory environments. We also understand how development works and what site selectors, developers and retail tenants need to see, hear, and feel from a potential location to move forward. Retail Attractions features a team of research and marketing professionals who assist retail recruiters in developing the necessary data and marketing materials to prove the case for investment in your community. Since beginning Retail Attractions, we have helped our clients launch millions of square feet of retail and reap the associated benefits of additional city revenues, plus new goods and services for citizens, and increasing the quality of life in the community.

OUR STAFF

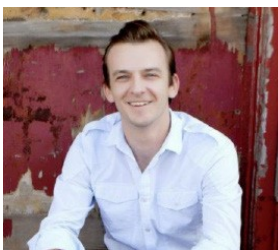


RICKEY HAYES

PRINCIPAL

Prior to founding Retail Attractions, LLC, while working in municipal economic development, Rickey Hayes facilitated new commercial construction totaling more than 10 million square feet with over half a billion dollars in total value, resulting in a city sales tax and ad valorem based more than triple what it had been. Since beginning Retail Attractions, Rickey has helped cities launch millions of square feet of additional retail space and reap the associated benefits in additional revenues, additional goods and services for their citizens, and directly improved the quality of life in those communities. Rickey has developed an extensive personal network of relationships in the area of government relations, retail, restaurant and land development, real estate and site selection, leasing and tenanting, engineering and creative financing and incentives to expedite the success of public / private partnerships for development projects.

Rickey holds a Bachelor's Degree in Criminal Justice and a Master's Degree in Counseling from Great Plains Baptist College. He is a member of International Council of Shopping Centers (ICSC). Rickey and his wife, Wendy, live in Owasso, Oklahoma and have four children and three grandchildren.



MICAH HAYES

CITY DATA/RESEARCH

Micah has been employed by Retail Attractions since the inception and is responsible for the collection of data on our client cities. Micah resides in Austin, Texas.

RONALD CATES—GENERAL COUNSEL

ROBERT NICHOLS—IT/WEBSITE & DATA PROTECTION

TED TURNER—SALES TAX, DATA & FORECASTING

PAT FRY—OFFICE ADMINISTRATION, ACCOUNTING

SARA STEPHENS—ADMINISTRATIVE ASSISTANT/RETAIL & RESTAURANT CONTACTS/RESEARCH

LIZ PRUITT— MARKETING, WEBSITE, REAL ESTATE SERVICES

OUR METHODOLOGY

Our Approach

Just as every city has distinctive characteristics, every consulting project is unique. Retail Attractions employs proven strategies to achieve economic development and growth in your community. We offer three tiers of contract service in addition to project-based and short-term engagements, allowing us to tailor our services to each client community's individual needs. Unlike "cookie-cutter" approaches to retail development that return little more than a bound document, partnering with Retail Attractions means you gain an experienced, dedicated staff who will work diligently on your behalf to grow your city. In addition to our tiered services under contract, additional services such as municipal web site development (for the city overall or specifically for economic development), experienced city and economic development PR efforts, and public meetings/input process management are available as well. These types of services may either be included in the contract for an additional cost or may be utilized on a project / as-needed basis by a client city for an additional estimated cost.

Market Assessment

Retail Attractions uses data from a variety of sources to accurately portray the trade area, retail potential and opportunities within a market. Sources used in this report include Nielsen-Claritas, Applied Geographic Solutions (AGS), the City, various state agencies, US Census Bureau, US Economic Survey and US Bureau of Labor information, as well as data received from local sources in our cities, as well as Regis and Piinpoint. Retail Attractions combines physical observation, data-driven research and information, retail site selection methodologies and competitive analysis with personal experience and a reputation for finding the right sites for the right retail boxes to create our market assessment reports. Retail Attractions uses carried methodologies in our market analysis and summary's including concentric rings, drive times, and custom trade area polygons.

Retail Recruitment

Our relationships with our clients do not end when we deliver our market assessment report. We promote and actively recruit for our clients throughout the term of their contracts through mail, email, web, phone and personal contacts in our comprehensive nationwide contact database. Our diligent pursuit of development for your community assures your community will be on the radar of appropriate national retailers.

The Benefits

Employing Retail Attractions to fulfill the city's need for an economic development professional allows the city to conserve resources that would otherwise be spent for no direct gain including insurance, employment taxes and other benefits. The city can reap the benefit of utilizing an experienced, successful economic development professional without incurring the expense of a fulltime exempt employee. Retail Attractions is intimately familiar with development dynamics and can bring our experience, network and concentrated approach to bear immediately on behalf of the city. No valuable time is lost through a "learning the process" or "learning the area" acclimation period. Commercial development often feels painfully slow when observing the process from the outside. From initial interest in a site to doors open for business is often an 18- to 24-month process. Retail Attractions will be with you every step of the way to help your community reach its maximum retail potential.

OUR DATA

Retail Attractions compiles data from a number of sources including Nielsen-Claritas, Applied Geographic Solutions (AGS), REGIS, the client City, various state agencies, the US Census Bureau, the US Economic Survey and information from the US Bureau of Labor and other sources plus local data and statistics. The primary sources for the demographic information included in this report are Nielsen-Claritas SiteReports and Applied Geographic Solutions (AGS) and REGIS, Regis Radis Sandbox.

Both Nielsen-Claritas and AGS pull data from public and private sources and apply their proprietary algorithm to determine demographic projections and estimates. Retail Attractions has carefully analyzed the resulting statistics and determined the algorithms that best represent the client community and trade area.

Nielsen-Claritas and AGS are highly respected data providers in the retail industry, and both sources calculate estimates for the current year and projections for five years in the future. Both companies produce data at varying geographic levels including national, state, county, city/town, zip code, and block group. These estimates and projections on a defined population can be analyzed according to population characteristics such as age, sex, race, Hispanic ethnicity, income, education, occupation, housing or rate of growth.

The demographic data contained in this report comes from AGS, and the opportunity gap data comes from Nielsen Claritas Retail Market Power™ (RMP). The RMP data allows the comparison of supply and demand to determine potential sources of revenue growth at any standard or user defined geographic level.

Neilson has relaunched and reformatted all the Claritas data in a new and improved platform. Retail Attractions has recently partnered with Piinpoint, a New York data company with some of the most unique retail data and market information available to provide a client's with another source of valuable market data and information.

We will be happy to discuss or answer any questions regarding the data used in this report.

ACKNOWLEDGEMENTS AND DISCLAIMER

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Nielsen and Applied Geographic Solutions are both highly respected data providers. However, these companies use algorithms to make estimates and projections. While these estimates and projections are based on years of research and adjustment, they are still only estimates and projections.

DISCLAIMER

All information is believed to be accurate and is presented in good faith by Retail Attractions, LLC under the terms and protections of the contract between the Client and Retail Attractions, LLC. While we do expect to successfully complete the objective of increasing commercial investment in your community, it is impossible to guarantee a level of investment or even any investment since market conditions, retailer's business plans, city policies and other market drivers are subject to change at any time and are beyond the control of Retail Attractions, LLC. You understand and agree that any advice provided under this proposal is true and correct to the best knowledge and ability of Retail Attractions, LLC and will be provided in good faith. The city accepts full responsibility for its decisions to act or not act according to said advice and agrees to indemnify and hold harmless Retail Attractions, LLC; its principals, employees, sub-contractors and associates pertaining to outcomes or situations that arise from the advice, materials or other items provided under this proposal agreement.

*In some data categories, less than 100% of population is referenced.