

TEXAS RETAIL SURVEY

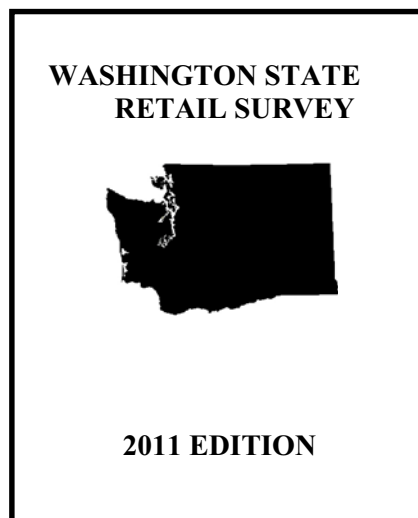


2011 EDITION

INQUIRIES REGARDING THE TEXAS RETAIL SURVEY SHOULD BE DIRECTED TO THE EUREKA GROUP, PUBLISHERS OF THE SURVEY

**THE TEXAS RETAIL SURVEY
C/O THE EUREKA GROUP
3976 GARNET ROAD
POLLOCK PINES, CALIFORNIA
95726
TEL: (530) 647-1219
FAX: (530) 647-1257**

Also available from Eureka Group



**Complete coverage of California & Washington State retail market.
All counties and cities included. 500 pages softbound. \$160**

The Texas Retail Survey is published annually by the Eureka Group, for the sole use of its customers. Reprint by permission only. Factual material contained in the Survey obtained from sources believed to be reliable. Rights of reproduction and distribution are reserved to the publisher. Copyright 2011 by Eureka Group.

TABLE OF CONTENTS

HOW TO USE THE SURVEY

I INTRODUCTION

- What is the Survey?
- What is it Designed to Do?
- Unique Features
- Organization

II EVALUATING A MARKET

- Choosing the Markets
- Interpreting the Data
- Rankings and Indices
- Recent Performance
- Long-Term Performance
- Future Prospects

III COUNTY & CITY REPORTS

IV STATISTICAL METHODS

- Growth Persistence Index
- Retail Sales Forecasts

V GLOSSARY OF TERMS

HIGHLIGHT SCREENS

- County Retail Market Highlights
- City Retail Market Highlights

SECTION A

- Texas Composite Sales Report
- County Sales Reports

SECTION B

- Large Cities Sales Reports

SECTION C

- Summary - County Rankings & Indices

SECTION D

- Summary - City Rankings & Indices

HOW TO USE THE SURVEY

HOW TO USE THE SURVEY

I Introduction

- * What is the Survey?
- * What is it Designed to Do?
- * Unique Features
- * Organization

II Evaluating a Market

- * Choosing the Markets
- * Rankings and Indices

III County and City Reports

- * Sample Reports
- * Contents of County and City Reports

IV Statistical Methods

- * Growth Persistence Index
- * Relative Strength Ratio

V Glossary of Terms

I. Introduction

What is the Retail Survey?

The Retail Survey is an independent market research advisory publication that focuses solely on the Texas retail market. In terms of geographical coverage, retail sector coverage, and sales trend data and analysis, it is believed to be the most comprehensive service of this type available on the Texas \$244 billion retail marketplace. The Survey is completely revised and updated annually.

What is the Retail Survey Designed to Do?

The Retail Survey is designed to provide a comprehensive review of retail sales activity in every county in the State of Texas, plus over 300 of the largest cities in the state. In total, the Survey reports on the historical sales trends in each of over 550 individual market areas in Texas, based on sales activity of over 292,000 individual retail outlets. In addition to historical sales trend data, the Survey also includes a wide range of statistical measurements that evaluate the past performance of individual markets and the prospects for future growth.

The Retail Survey has been designed so that it can be used productively by a wide range of customers that find it necessary to track and analyze retail markets in Texas. Using the Survey, business executives with varied backgrounds and objectives can substantially improve their ability to make informed decisions.

(1) The Independent Retailer, who needs to know how his or her local market is performing, can rely upon the Retail Survey to provide a detailed examination of sales activity by type of retail store, and what the prospects are for growth in the future. Using these sales data, market indices and rankings, the independent retailer is better prepared to forecast his/hers store's future performance.

(2) The New-To-Market Retailer, who needs to know the size of the market, and long-term trends, can rely upon the Retail Survey to provide the market research that will be needed to help launch a new business. Before the new-to-market retailer opens the door, short-term and long-term trends will have been identified and factored into the company's business plan. Fewer surprises substantially increase the chance of launching a successful new venture.

(3) The Marketing Manager for a wholesaler or manufacturer, who wants to pinpoint the fastest growing markets, can rely upon the Retail Survey to decide where to concentrate advertising and promotion efforts to guarantee greatest impact. Assigning sales staff to geographical territories can be accomplished with a greater degree of confidence, and distribution channels can be reviewed and modified based on changing market conditions and trends.

(4) Bankers and Financial Advisers use the Retail Survey data and analytical measurements as benchmarks to evaluate how their individual retail clients are performing compared to market averages, and identify problem areas at an earlier stage.

(5) Government Officials, with responsibilities for urban planning, tax revenue forecasting and economic development, can quickly utilize the Retail Survey to compare the performance of their community with neighboring cities and counties, identify areas of weakness and competitive advantage, and develop more effective policy initiatives.

(6) Providers of Business Services, such as accounting firms, real estate brokers, and advertising firms, can efficiently track retail trends in their market area, and identify retail sectors offering the best opportunities for new client development.

(7) Chain store and Supermarket Executives, who need to plan site location strategies, can quickly narrow down the list of potential expansion locations, identify market areas that are presently under-served, and easily track their store's sales performance compared to the overall market.

(8) Real Estate Appraisers, who are responsible for analyzing local market trends and their impact on real estate values for retail properties, use the Survey's extensive data and analysis to accurately identify supply and demand conditions that have important affects on property values.

(9) Media Executives, in television, radio, and newspapers who are responsible for marketing and advertising strategies, use the Survey to keep track of their local retail market, identify fast-growing retail sectors to target for new advertising revenue, and compare local retail trends with surrounding areas.

The Survey's Unique Features

The Texas Retail Survey has been designed with several objectives in mind: (1) comprehensive coverage of the market (2) ease of use by a wide range of customers regardless of their professional background, and (3) the use of objective analytical measurements that improve the ability of customers to understand the retail sales trends in each market, and to quickly compare growth performance among various areas.

These objectives have resulted in the Retail Survey containing a number of unique features that deserve to be highlighted:

(1) Broad Coverage

The Texas Retail Survey provides detailed report on each of 254 counties and 323 cities in Texas. Retail sales data are broken down in detail for 14 separate retail store categories. This is believed to be the most comprehensive coverage of the Texas retail marketplace available anywhere.

(2) Four Key Market Measurements

- Performance Index
- Relative Strength Ratio
- Growth Persistence Index
- Star Rating

These four key market measurements allow Survey users to quickly understand the relative trends in each geographical market, and to accurately compare past performance and future prospects for growth among the markets of interest.

The Performance Ranking provides an easily understood measurement of one market's growth rate in the current year compared to all other markets in Texas. The rankings for each market range from 1 to 5, with 20% of the markets with the highest recent growth rate being assigned the 1 ranking.

The Relative Strength Ratio measures the long-term retail sales growth trend in one local market compared to growth fluctuations in statewide retail sales. Since the Ratio covers a period of the last five years, it provides Survey users with an easily understood comparison of longer-term sales growth trends, relative to statewide averages. The ratio is derived by dividing the percentage increase in retail sales in a specific county or city over the past five years by comparable percentage increases for total statewide retail sales.

The Growth Persistence Index measures the ability of a local market to consistently out-perform the overall

market each year. This measurement is used to differentiate markets with steady, above average growth from those that experience wide fluctuations in their relative growth performance.

The Star Ratings provide Survey users with a clear assessment of a market's growth compared to all other markets in Texas. Markets that have grown the fastest over the last five years are given the five-star rating.

(3) Retail Sales & Outlet Data

Individual market reports appearing in the Texas Retail Survey contain nine years of sale data for up to 14 individual retail store categories. The Retail Survey also contains data on retail outlets in each of the past nine years for these same 14 retail store categories. These data provide the basis for preparing the analysis and rankings of each local market. Lastly, a Texas State Composite report is included in the Survey to provide an overview of aggregate retail sales activity for the entire state over the last nine years, and can be used as a reference point when comparisons of statewide and local retail conditions are desired. The Texas State Composite report can be found in Section A of the Survey.

(4) Retail Sales Forecasts

Lastly, the Survey provides a one-year forecast of retail sales for each of Texas' 254 counties and 323 of the state's largest cities.

Organization

The Survey is organized so that users can easily find and use the data they require with a minimum of time and effort. The Survey is divided into the following sections:

- * How to Use the Survey
- * Section A- Counties Retail Sales Reports
- * Section B- Large Cities Retail Sales Reports
- * Section C- Summary County Rankings &Indices
- * Section D- Summary City Rankings &Indices

For new customers we recommend that the How to Use section be reviewed prior to using the Survey so as to become familiar with the terms and analytical measurements appearing in the Survey. Next, customers should spend about fifteen minutes reviewing each of the sections to become familiar with the various types of reports and their characteristics.

LONE STAR COUNTY



SALES REPORT & RANKINGS

PERFORMANCE RANK	GROWTH PERSISTENCE	RELATIVE STRENGTH	SALES RANK	PER CAPITA SALES RANK	STATE SALES%	5 YR GROWTH RATES	
						SALES	POPULATION
3	57.1%	1.06	19	7	1.23%	7.1%	2.0%

OUTLET GROWTH LAST 5 YRS	OUTLETS RANK	% STATEWIDE OUTLETS	POP. RANK	PER OUTLET SALES RANK	MEDIAN AGE	HSHOLD SIZE	% STATEWIDE POPULATION
2.6%	8	1.17%	10	15	36.5	2.50	1.17%

Market Share

Annual Retail Growth

\$SALES PER HOUSEHOLD	LOCAL MKT	TEXAS NORM
MOTOR VEH. & PARTS	8,278	\$6,982
ELECTRONICS & APPL	\$1,099	\$2,258
FURNITURE	\$1,000	\$1,198
BUILDING MATRL	\$3,139	\$2,970
GAS STATIONS	\$5,045	\$4,916
APPAREL & ACCESSORY	\$1,069	\$1,909
GEN MERCHANDISE	\$23,489	\$8,575
RESTAURANTS & BARS	\$3,868	\$4,238
TOTAL	\$54,716	\$50,052
#HOUSEHOLDS	108,363	
OUTLETS PER 10K POP	115	117

RETAIL SALES (\$000)	03	04	05	06	07	08	09	10	11	GROWTH	PER CAPITA SALES
MOTOR VEH. & PARTS	693,434	686,902	761,495	909,801	891,316	901,056	823,465	868,308	897,039	2.7%	\$3,126
FURN & HOME FURN	51,955	53,028	63,627	83,499	92,475	101,386	99,435	104,850	108,319	10.5%	\$378
ELECTRONICS & APPL.	63,396	66,950	74,076	85,733	93,835	105,208	109,304	115,256	119,070	9.2%	\$415
BUILD. MATERIALS	219,567	234,043	259,741	285,512	309,349	306,153	312,273	329,278	340,173	4.9%	\$1,186
FOOD & BEV. STORES	312,167	328,596	348,694	359,862	350,590	376,709	408,400	430,640	444,889	4.3%	\$1,550
DRUG/HEALTH STORES	80,116	94,080	98,470	105,718	115,800	121,012	142,752	150,525	155,506	8.9%	\$542
GASOLINE STATIONS	227,896	249,145	279,417	343,859	390,971	431,337	501,895	529,226	546,737	13.6%	\$1,905
APPAREL & ACCES.	89,793	94,919	101,752	97,974	103,482	105,634	106,365	112,157	115,868	2.0%	\$404
SPECIALTY STORES	56,077	58,545	63,423	67,949	68,900	63,702	68,426	72,152	74,540	2.6%	\$260
GEN MERCH. STORES	1,299,327	1,645,358	1,623,528	1,772,237	1,755,498	2,051,388	2,336,587	2,463,830	2,545,353	8.7%	\$8,871
MISC RETAILERS	93,345	94,732	93,544	97,619	108,532	107,995	112,698	118,835	122,767	4.9%	\$428
NONSTORE RETAILERS	22,502	25,947	31,201	26,081	22,910	30,507	36,471	38,457	39,729	4.3%	\$138
RESTAURANTS & BARS	237,474	247,588	270,820	305,519	318,471	345,492	384,781	405,734	419,159	8.4%	\$1,461
RETAIL SALES TOTAL	3,447,050	3,879,833	4,069,787	4,541,362	4,622,128	5,047,580	5,442,850	5,739,250	5,929,150	7.1%	\$20,664

RETAIL OUTLETS	03	04	05	06	07	08	09	10	11	GROWTH	PER OUTLET SALES
MOTOR VEH. & PARTS	174	177	179	183	190	188	180	188	191	1.0%	\$4,618,659
FURN & HOME FURN	67	70	84	95	96	92	86	90	91	1.3%	\$1,167,302
ELECTRONICS & APPL.	64	66	65	84	94	93	84	88	89	6.2%	\$1,313,711
BUILD. MATERIALS	85	91	93	96	96	101	105	110	111	3.4%	\$3,002,538
FOOD & BEV. STORES	98	103	116	133	137	144	145	151	154	5.5%	\$2,843,551
DRUG/HEALTH STORES	57	65	73	79	88	90	94	98	100	6.1%	\$1,533,192
GASOLINE STATIONS	162	161	169	168	158	154	157	164	166	-0.6%	\$3,227,428
APPAREL & ACCES.	255	273	298	293	286	277	277	269	293	-0.6%	\$387,670
SPECIALTY STORES	225	224	218	206	169	166	167	174	177	-4.4%	\$413,665
GEN MERCH. STORES	74	78	86	95	107	116	113	118	120	6.5%	\$20,875,986
MISC RETAILERS	632	658	706	743	852	847	777	812	823	2.8%	\$146,432
NONSTORE RETAILERS	84	90	111	123	133	173	187	195	198	12.0%	\$196,900
RESTAURANTS & BARS	563	599	611	630	654	670	688	719	729	3.3%	\$564,635
RETAIL OUTLETS TOTAL	2,540	2,655	2,809	2,928	3,060	3,111	3,060	3,196	3,242	2.6%	\$1,795,760

CITY TREND (YR)	03	04	05	06	07	08	09	10	11	5 YR GROWTH
POPULATION	246,685	250,321	252,001	260,526	269,073	274,881	277,743	277,743	277,743	2.0%
SALES PER OUTLET(\$)	1,357,106	1,461,331	1,448,838	1,551,012	1,510,499	1,622,494	1,778,709	1,795,760	1,828,856	4.4%

Summary: The Performance Rank of 3, measuring sales growth in the most recent year, is average. Over the past 10 yrs, the Growth Persistence Index (57.1%) has been average, while the 5 yr Relative Strength Ratio of 1.06 is above the state norm of 1.0. In total sales, the county's rank is 19, while the Per Capita Sales Rank is 7. Population Growth has averaged 1.96% over the past 5 yrs, compared to statewide norm of 1.31%.

Per Outlet Sales Rank is 285, representing avg sales per outlet of \$1,795,760. The annual growth rate over the past 5 yrs for Per Outlet Sales has been 4.4%. Note: Growth Rates are annual for period 2005-2010. Sales & outlet data for 2011 are forecasts and subject to future adjustment.

II. Evaluating A Retail Market

The Texas Retail Survey's principal goal is to present as much accurate and relevant data and analysis as possible on each local retail markets so that our customers can make informed and intelligent decisions based on their particular interests. Since each customer has his or her own specific needs, the manner in which the Survey will be used will take many forms. Even though individual needs and interests will vary among customers, all can benefit from using the Retail Survey.

Choosing the Markets

The first step in putting the Texas Retail Survey to practical use is to choose the market area or areas you wish to examine. The selection of the market(s) will of course depend upon the customer's particular objective. If your interests lie in only one specific market (one city, for example), your choice is simple...just turn to the appropriate page that contains that particular city's report. However, if your interests are broader, you can choose the markets to examine based on one or more criteria, such as by size (the top ten markets by volume of retail sales), or by various measurements of growth (all markets ranked No.1 or 2 for Performance). By using Section C and Section D, you're able to easily identify county and city markets that meet various types of selection criteria.

These are but a few of the ways Survey users can narrow their field of interest. Since the Texas Retail Survey contains such a wide range of data, analysis, and cross comparisons among individual markets, users frequently develop their own unique methods to use the market reports to meet their individuals objectives.

Interpreting The Data - An Example

At first glance, an individual market report may appear overwhelming, but one does not need any specific professional background to put the data to productive use. To get a better grasp on how to use and interpret a typical market report, one will be examined step-by-step. For this exercise, we have developed a hypothetical market report called "Lone Star County".

This fictitious report, used only for illustration, contains in every detail the type of information, data and analysis that can be found in an actual county report contained in the Texas Retail Survey. Please refer to the previous page containing this Lone Star County report.

Rankings and Indexes

Starting at the top of the page, we first see that Lone Star County has a Sales Rank of 19. This means that based on actual volume of total retail sales, Lone Star County is the nineteenth largest among the 254 counties in Texas. In other words, the retail market in this county is among the largest in the state, measured in absolute terms.

Next, we find that the Per Capita Sales Rank is 7, or seventh highest among the 254 counties. From this ranking, we learn that, on average, retail sales are much higher than one would expect based on the county's population size. Several reasons could account for this high per capita sales activity. One, it could be due to residents from adjacent counties spending their income in retail stores in Lone Star County, thereby pushing up the level of per capita sales, since Lone Star County's per capita sales is calculated only on its own population base. Another reason may be that the income level in Lone Star County is significantly higher than those found in most other counties, allowing local residents to spend more on a per person basis.

Recent Performance

On the far left hand side of the top section, we find that Lone Star County's Performance Rank is 3-average. The Performance Rank measures the growth rate in 2010 relative to all other counties. Rankings range from 1 to 5, with 1 assigned to the top performers.

With a Performance Rank of 3- average, we are told that Lone Star County has experienced retail sales growth that falls within the midpoint range during the most recent year in which actual sales data are available. Although an important measurement of current performance, it does not tell anything about how Lone Star County has fared over the longer term.

Long-Term Performance

Now go to the Relative Strength Ratio. The Relative Strength Ratio for Lone Star County is 1.06. This is interpreted as meaning that the county's retail sales have grown 6 percentage points faster than statewide retail sales over the five-year period from 2005 through 2010. From the Relative Strength Ratio, we can determine how well or poorly Lone Star County's growth has been compared to statewide trends over this five-year period.

Future Prospects

Although the Relative Strength Ratio is an important measurement in assessing long-term trends, we also want to know how consistent is the growth in Lone Star County. Put another way, in any given year, what has been the likelihood that Lone Star County would experience a growth rate in retail sales that exceed the statewide average growth rate?

To answer this question, refer to the Growth Persistence Index for Lone Star County. We find that the Index is 57.1%, compared to a perfect score of 100%. From this we learn that Lone Star County has done reasonably well in out-performing statewide growth rates over a period of years. For a complete description of interpreting the Growth Persistence Index, please refer to the Statistical Methods section appearing later in this section.

To complete our review of the uppermost section of the report, we now turn to the graphic presentation on the left of the page, entitled Market Share. Here, we see that the General Merchandise sector in Lone Star County is the leading sector, accounting for 42.9% of all retail sales in the county, based on actual 2010 sales data. The next graphic section provides an historical comparison of Lone Star County and statewide sales growth rates from 2004 through 2010.

To the far right of the page is a table comparing dollar retail sales per household for Lone Star County (Local Market Column) to comparable data for the state as a whole. This table tells us that total retail sales per household in Lone Star County amount to \$54,716, compared to a statewide norm of \$50,052. Overall, Lone Star County household retail spending is much higher than statewide norms.

Differences in individual categories are likely due to some combination of higher income levels of local residents and more attractive pricing/selection and marketing in the local market relative to statewide norms, encouraging out-of county residents to travel to Lone Star County for shopping.

Star Rating System

Each county and city market report includes a composite star rating at the top of the page. This composite rating reflects the individual market's sales growth rate relative to all other markets, over the past five years.

The top 20% of markets, ranked by sales growth, receive the five star rating. The next 20% of markets earn four stars (above average), followed by three stars (average), two stars (below average), and one star (lowest), in increments of 20% based on the five-year sales growth ranking.

With the star rating system, Survey users receive a clear view of how a specific local market compares with all other markets in terms of long-term sales growth. From this quick review of the first page of Lone Star County report, we have a much better understanding of this market's size, growth trends, spending patterns, and overall standing relative to other counties in Texas. It is one of the largest counties in terms of absolute sales volume and per capita sales. It has a long-term tendency to grow faster than statewide averages, and its persistence to out-perform the statewide growth is rated average.

Further, retail sales per household are much higher than the state norm, indicating that Lone Star County is pulling retail spending into the local area from adjacent counties.

Per Capita Retail Sales

To round out our overall understanding of the Lone Star County retail market, we must now examine several additional data in the report. Based on 2010 data, Lone Star County has the 7th highest level of per capita sales, amounting to \$20,664. The leading category of per capita sales is the General Merchandise Store sector (\$8,871).

Also, note that the Median Age (36.5 yrs. old) and Household Size (2.50). Both these data can be valuable in better understanding the buying habits and preferences of local area consumers, especially when compared to statewide norms found in the Texas Composite report (Section A).

Outlet Data

To round out our overall understanding of the Lone Star County retail market, we must now examine the data relating to retail outlets. Based on 2010 data, Lone Star County has the 8th highest number of retail outlets (Outlets Rank) among the 254 counties, even though its population base is tenth in the state (Population rank). This is not surprising. The solid long-term retail sales growth has understandably attracted more retail outlets than would be otherwise expected given its population size.

We also see that the number of retail outlets is increasing at an annual rate of 2.6%. New retailers are being attracted to the market due to its above average household spending and its average growth performance. Although the number of retail outlets is growing, the number is surely not excessive. If you refer to the data on "outlets per 10,000 population", you learn that Lone Star County has 115 retail outlets for each 10,000 of population in this market, compared to a state norm of 117. Since the number of outlets per population base is somewhat lower than the norm, the market can likely absorb additional retail outlets, especially considering the relatively high sales per outlet.

The lower section of the Lone Star County report contains a year-by-year history of the number of retail outlets for each of the 14 retail sectors, with the last

column providing a calculation of the average annual growth rate for each category over the past 5 years of actual data (2005-2010).

Using these data one can quickly track the number of new entrants in each market sector, allowing Survey customers to quickly identify those sectors that are attracting new retail store locations and increased competition. For example, we see that restaurant/bar outlets have expanded from 611 to 719 between 2005 and 2010, a 3.3% increase in competitors per year during this five year period. The report also shows that restaurant/bar outlets are forecasted to reach 729 in 2011.

III. County and City Report

Each county and city report contains a wide range of data, market rankings and indices, all of which can be used to gain a better understanding of the trends that exist in each market area. The following briefly outlines the various components included in the Retail Survey Reports.

Sales Rank - A ranking based on the total retail sales in the county or city, as of the most recent year in which actual data are available. Forecasted data are not used to determine rankings. For counties, the rankings range from 1 (highest) to 254 (lowest). For cities ranking ranges from 1(highest) to 323 (lowest).

Per Capita Sales Rank- A ranking based on total 2010 retail sales in the county or city, divided by the 2010 population in that county or city. For counties, the rankings range from 1(highest) to 254(lowest). For cities ranking ranges from 1(highest) to 323 (lowest).

Percent Statewide Sales- Calculated by dividing total retail sales in the county or city by the total retail sales in Texas, as of the most recent year in which actual data are available. This measures the "market share" of a county or city relative to total retail sales in the state.

Sales Growth-Last 5 Years- Calculation of the compound annual rate of retail sales growth for the period 2005 through 2010.

Relative Strength Ratio - A measurement of the five-year sales growth (2005-2010) trend in a city or county compared to the sales growth trend statewide. An index of 1.25 can be interpreted as meaning that during the past five years, retail sales in the county or city grew 25 percentage points faster than the statewide average. An index of 2.35 would be interpreted to mean that retail sales in that local market have grown 135 percentage points faster than the state norm. Conversely, a Ratio of .85 would mean that the local market grew slower than the statewide average...in this example 15 percentage points lower than the statewide average.

Growth Persistence - An evaluation of a county/city's ability to consistently out-perform statewide growth trends. This index ranges from 100% (highest) to 0% (lowest). Please see the Statistical Measures section for detailed explanation.

Performance Rank- A ranking of the percentage growth in retail sales for the most recent year that actual data are available. The rankings range from 1(highest) to 5 (lowest). After all markets are ranked based on percentage growth, numerical rankings are assigned as follows:

PERFORMANCE RANKINGS

PERFORMANCE RANKS-COUNTIES		PERFORMANCE RANKS-CITIES	
TOP 50	RANK 1 (HIGHEST)	TOP 65	RANK 1 (HIGHEST)
NEXT 50 RANK	RANK 2 (ABOVE AVERAGE)	NEXT 65	RANK 2 (ABOVE AVERAGE)
NEXT 50 RANK	RANK 3 (AVERAGE)	NEXT 65	RANK 3 (AVERAGE)
NEXT 50 RANK	RANK 4 (BELOW AVERAGE)	NEXT 65	RANK 4 (BELOW AVERAGE)
LOWEST 54	RANK 5 (LOWEST)	LOWEST 63	RANK 5 (LOWEST)

Retail Sales (Actual) - Presented for an eight-year time frame, for each type of retail store. Note that the column immediately to the right of the retail sales data provides compound annual growth rates for the past 5 years in which actual data are available, for each retail store category. When there are no sales data for a particular category, it is due to no sales in that particular year, or that data are suppressed to avoid divulging data for a particular retailer. Retail sales data are derived from sales data reported by all retailers to the Texas Comptroller's Office. For most retail categories, sales data represent retail sales subject to the Texas sales tax. The two exceptions are the motor vehicle & gasoline stations sectors. Data for these two categories are derived from gross sales reported on state sales tax returns.

Retail Sales (Forecasts) - For each county & city, retail sales forecasts are prepared for the most recent year under review. These sales forecasts are not used to calculating the growth rates appearing in the far right column of each sales report.

Population Growth - The actual compound annual rate of growth in population in a city or county for the most recent five-year period 2005-2010.

Market Share Graph - A graphic breakdown of retail sales by eight major retail categories. The percentage breakdowns are based on actual retail sales for the current year.

Sales Growth Graph - A history of the percentage change in a county or city's actual retail sales compared to statewide growth rates.

Growth Rate - A calculation of the annual compound rate of growth of retail sales during the most recent five years in which actual data are available. Growth rate calculations do not include sales projections.

Per Capita \$ Sales - A measurement of the per-person retail sales for each county or city. It is calculated by dividing 2010 sales data by the 2010 population in the county or city. This measurement provides a means to compare sales volumes between two market areas that have significantly different populations, since it puts each market area on a relatively equal basis, regardless of population size. Data are rounded to the nearest dollar.

Median Age - The median age of the county or city's population.

Household Size - The average number of people in each household in the county or city.

Population Rank - A ranking based on the 2010 total population of each county or city. County rankings range from 1(highest) to 254 (lowest). City rankings range from 1(highest) to 323 (lowest).

Population Trend Data - A statistical summary of county and city population data for the past nine years.

Sales Per Outlet Trend Data -A statistical summary of county & city sales per outlet data for the past nine years.

Per Capita Sales Column - By retail category, a column on the far right side of the page showing \$ amounts for 2010.

Percent Statewide Population -Measures the percentage of statewide population that is located within the particular city or county.

County Identifiers - Immediately following the name of each city in the top line of each city report is the name of the county or counties in which that city is located. When a city is located in more than 2 counties, the identifier section may be followed by a plus (+), indicating that one ore more county names are not listed due to space limitations.

Sales Per Household Table - For each major retail sector, this table measures the dollar retail sales per household. The table compares these data for the local market with comparable data representing the statewide norm. They are calculated by dividing 2011 sector retail sales in a market by the current number of households within that market. By comparing the statewide data to the local market data, Survey users can identify important local market imbalances that point to either strengths or weaknesses in the local market.

For example, if the table shows that a local market's furniture store sales per household are significantly lower than the state norm, it may indicate that the existing local furniture stores are not adequately serving the local population, and thereby encouraging these consumers to shop outside this local market.

Conversely, if furniture store sales per household are much higher than the state norm, it may indicate that the local market is attracting large numbers of shoppers from outside the immediate local market.

IV. Statistical Methods

Using what is believed to be the most timely, accurate and unbiased data available on retail trends, the Texas Retail Survey analyzes these data and presents a number of rankings and indices that have proven to be important measurements of market performance. Due to their uniqueness and analytical importance, two of these deserve special attention. To insure that customers can fully understand the rationale and construction of these analytical techniques, each one is described below.

Growth Persistence Index - Growth can be measured in many ways, depending on the specific analytical objective. With this index, the objective is to identify those retail markets that have a consistent ability to grow faster than the state as a whole, based on year-by-year performance. Some markets show strong surges in retail sales growth in one or two years, followed by periods of below average growth.

Conversely, other markets experience moderate (but still above average) growth year after year. When analyzing any specific retail market, Survey users will undoubtedly want to examine not only its ability to grow, but also the consistency of that growth. If a market is prone to wide and unpredictable swings in growth, a Survey user will want to be alerted to this fact. Using the past seven years growth rates for county/city markets and the statewide market, a calculation is made to determine the number of subsequent years in which a county, city, or retail sector market out-performed the statewide growth rate.

The result of these calculations is the basis for the Growth Persistence Index.

Therefore, a local market that has experienced sales growth above the statewide average for every one of the last seven years would be given a perfect score of 28. Conversely, the example of Lone Star County used here shows a score of 12 out of a possible perfect score of 21. The Growth Persistence Index, in this example, is then calculated by dividing the actual score (12) by the highest possible score (21). The resulting Index becomes 57.1%.

Among Texas' 323 cities and 254 counties, it is rare for a specific local market to out-perform the statewide average growth rate for seven years in a row, earning a Growth Persistence Index of 100%. From a practical standpoint, a local market that earns a Growth Persistence Index of 70% and above is performing extremely well, and is characterized as a "strong" market. Markets with Growth Persistence Index's between 60% and 69% are considered "above average", while markets with indexes ranging from 40% to 59% are characterized as "average".

Markets with an index between 20% and 39% are "below average", while markets with indexes below 20% are termed "low" for this measurement. Using our fictitious Lone Star County as an example, we can demonstrate the calculation of the index:

CALCULATION OF GROWTH PERSISTENCE INDEX

YEAR	STATEWIDE GROWTH RATES	LONE STAR CO. GROWTH RATES	NUMBER OF SUCCEEDING YEARS COUNTY GROWTH GREATER THAN STATE
2004	5.47%	12.56%	3
2005	7.34%	4.90%	3
2006	9.11%	11.59%	2
2007	6.26%	1.78%	2
2008	6.97%	9.20%	1
2009	8.22%	7.83%	1
2010	2.56%	5.45%	0
			Total = 12

Retail Sales Forecasts - Using the statistical forecasting technique referred to as exponential smoothing, historical trends over the most recent ten-year period are evaluated using six computer-forecasting models, and the resulting trend characteristics are then extrapolated into the future. In using the forecasts contained in the Survey, customers should keep in mind that forecasts are never perfect. In the Survey, the forecasts rely upon historical trend

characteristics. The Survey makes no attempt to predict future events that may have a significant impact on retail sales volume.

Each county and city report contains detailed one-year forecasts of retail sales for each retail category. The forecast data are rounded, which may cause column data not to equal totals.

V. Glossary of Terms

Apparel & Accessory Stores: This broad group includes outlets primarily engaged in the retail sale of new clothing and accessories. Included in this category are retailers engaged in the sale of women's, men's, children's, and or family apparel and/or shoes.

Electronics & Appliances : Retail Outlets that offer household appliances, consumer electronics, computers and software, radios and other audio equipment are included in this category.

Motor Vehicles & Parts: Retailers that are predominantly involved in the sale of new and used automobiles are included here. Often, these retailers also sell automobile parts.

Building Materials: Outlets primarily retailing lumber, building materials, door and window products, and masonry materials to both consumers and construction contractors are included in this category.

City: An area that has officially been incorporated under the laws of Texas as a city. From time to time, city boundaries do change, causing some change in the amount of retail activity, and population credited to a particular city.

County: Texas has 254 counties, which are the primary political and administrative subdivisions of the state.

Current Year: Refers to that year in which actual (as opposed to forecasted) sales and outlet data are available for a particular city or county market.

Drug & Health Care Store Group: These outlets are engaged in the retail sale of prescription drugs, proprietary drugs, and non-prescription medicines. These outlets usually also offer a range of related products, such as personal care items, stationery, and novelties. Due to data collection limitations, sales of prescription drugs are not included. As such, total retail sales for this category are understated.

Food & Beverage Stores: Retailers primarily engaged in retailing food and beverages merchandise from fixed point-of-sale locations. Includes food stores offering a wide range of grocery products for retail sale, as well as smaller stores offering a limited line of food products. Due to data collection limitations, sales of food for home consumption are not included. As such, total retail sales for this category are understated.

General Merchandise Stores: Includes department stores, discount dept stores, and warehouse clubs.

Growth Rate: In city and county reports, growth rate figures in the far right column refer to the compound annual rate of change over the last five years in which actual data are available. The growth rate calculation does not include forecasted data.

Furniture & Home Furnishings: Included within this category are retailers engaged in retailing new furniture, such as household furniture (e.g., baby furniture, box springs and mattresses) and outdoor furniture; home furnishings, or floor coverings.

Misc. Retailers: This broad category includes stores with unique characteristics like florists, used merchandise stores, office supplies, gift stores, and pet and pet supply stores as well as other store retailers.

N.A.: Data not available because the city had not yet been incorporated, or because publication of data may result in the release of confidential information on a specific retail firm, or for other reasons that make data unavailable.

Non-Store Retailers: Included within this category are mail order houses, vending machine operators, direct selling establishments, and electronic shopping.

Food & Beverage Stores: This category includes retailers offering a line of food items, such as fruit & vegetable stores, meat markets, fish & seafood markets, bakeries, & liquor stores

Restaurants/Bars: Eating and drinking places offering either/or alcoholic beverages (beer, wine, spirits and meals for on-premises consumption.

Gasoline Stations: Retailers primarily engaged in the sale of gasoline and/or diesel fuel are included in this category. These retailers also frequently sell related auto parts and offer repair service. They may also offer a line of packaged and prepared convenience food.

Specialty Stores: This broad category includes such retailers as sporting goods, toy stores, or other specific leisure activities, such as needlework and musical instruments. Book stores are also included in this group.

HIGHLIGHT SCREENS CITY & COUNTY MARKETS

COUNTY MARKET HIGHLIGHTS

GROWTH PERSISTENCE

RELATIVE STRENGTH

TOP TEN		BOTTOM TEN		TOP TEN		BOTTOM TEN	
1	FRIO	10	RUNNELS	1	LA SALLE	10	IRION
2	GARZA	9	KAUFMAN	2	ROBERTS	9	GRAY
3	UPTON	8	DALLAS	3	FRANKLIN	8	ARMSTRONG
4	MOORE	7	COLORADO	4	GLASSCOCK	7	HUDSPETH
5	BELL	6	POTTER	5	MEDINA	6	WALLER
6	SHERMAN	5	PALO PINTO	6	WILSON	5	BRISCOE
7	COMAL	4	GRIMES	7	REAL	4	SAN AUGUSTINE
8	GOLIAD	3	BAILEY	8	MCMULLEN	3	RED RIVER
9	JOHNSON	2	LIBERTY	9	HALL	2	GRIMES
10	WILLIAMSON	1	LEE	10	SWISHER	1	CAMP

RETAIL SALES RANK

POPULATION SIZE

TOP TEN		BOTTOM TEN		TOP TEN		BOTTOM TEN	
1	HARRIS	10	BORDEN	1	HARRIS	10	LOVING
2	DALLAS	9	KENT	2	DALLAS	9	KING
3	TARRANT	8	ROBERTS	3	TARRANT	8	KENEDY
4	BEXAR	7	IRION	4	BEXAR	7	BORDEN
5	TRAVIS	6	FOARD	5	TRAVIS	6	KENT
6	COLLIN	5	GLASSCOCK	6	COLLIN	5	MCMULLEN
7	EL PASO	4	TERRELL	7	EL PASO	4	ROBERTS
8	HIDALGO	3	MOTLEY	8	HIDALGO	3	TERRELL
9	DENTON	2	ARMSTRONG	9	DENTON	2	STERLING
10	WILLIAMSON	1	STERLING	10	FORT BEND	1	GLASSCOCK

CITY MARKET HIGHLIGHTS

GROWTH PERSISTENCE

RELATIVE STRENGTH

TOP TEN		BOTTOM TEN		TOP TEN		BOTTOM TEN	
1	Bee Cave	10	No. Richland Hills	1	Murphy	10	Hempstead
2	Corsicana	9	Mesquite	2	Leander	9	Pantego
3	Edinburg	8	Leon Valley	3	Kyle	8	Sachse
4	Kyle	7	Farmers Branch	4	Mercedes	7	Slaton
5	Leander	6	Athens	5	Floresville	6	Pittsburg
6	Mission	5	Stafford	6	Burkburnett	5	Stafford
7	Rosenberg	4	Pittsburg	7	Bee Cave	4	Duncanville
8	Allen	3	Pantego	8	Pflugerville	3	Hedwig Village
9	Beeville	2	Palestine	9	Bulverde	2	Leon Valley
10	Dumas	1	Llano	10	Luling	1	White Settlement

RETAIL SALES RANK

POPULATION SIZE

TOP TEN		BOTTOM TEN		TOP TEN		BOTTOM TEN	
1	Houston	10	Bandera	1	Houston	10	Sunset Valley
2	San Antonio	9	Slaton	2	San Antonio	9	Bandera
3	Dallas	8	Hewitt	3	Dallas	8	Clear Lake Shores
4	Austin	7	Port Neches	4	Austin	7	Hudson Oaks
5	Fort Worth	6	Royse City	5	Fort Worth	6	Beverly Hills
6	El Paso	5	Marlin	6	El Paso	5	Bee Cave
7	Plano	4	Springtown	7	Arlington	4	Pinehurst
8	Arlington	3	Early	8	Plano	3	Hedwig Village
9	Lubbock	2	Cameron	9	Corpus Christi	2	Woodville
10	Corpus Christi	1	Sanger	10	Lubbock	1	Pantego

Note: A market rank of #1 in Top Ten column represents the highest ranking. A market ranking of #10 in the Bottom Ten Column represents the lowest ranking.

SECTION A

TEXAS COMPOSITE REPORT & COUNTY RETAIL SALES REPORTS

ANDERSON COUNTY

RATING (AVG) ★★☆☆

SALES REPORT & RANKINGS

PERFORMANCE RANK	GROWTH PERSISTENCE	RELATIVE STRENGTH	SALES RANK	PER CAPITA SALES RANK	STATE SALES%	5 YR GROWTH RATES	
						SALES	POPULATION
2	71.4%	1.02	66	123	0.15%	2.8%	0.3%

OUTLET GROWTH LAST 5 YRS	OUTLETS RANK	% STATEWIDE OUTLETS	POP. RANK	PER OUTLET SALES RANK	MEDIAN AGE	HS HOLD SIZE	% STATEWIDE POPULATION
-1.5%	76	0.17%	56	55	39	2.57	0.23%

Market Share

Annual Retail Growth

\$SALES PER HOUSEHOLD	LOCAL MKT	TEXAS NORM
MOTOR VEH. & PARTS	\$4,834	\$6,900
ELECTRONICS & APPL	\$145	\$943
FURNITURE	\$199	\$751
BUILDING MATRL	\$1,660	\$1,772
GAS STATIONS	\$2,861	\$3,408
APPAREL & ACCESSORY	\$372	\$1,518
GEN MERCHANDISE	\$3,449	\$4,081
RESTAURANTS & BARS	\$1,901	\$3,753
TOTAL	\$16,952	\$27,406
#HOUSEHOLDS	22,074	
OUTLETS PER 10K POP	89	117

RETAIL SALES (\$000)	03	04	05	06	07	08	09	10	11	GROWTH	PER CAPITA SALES
MOTOR VEH. & PARTS	70,850	70,682	72,462	78,129	77,594	83,291	75,916	103,395	106,703	7.4%	\$1,818
FURN & HOME FURN	3,660	3,816	3,969	3,821	3,776	3,253	3,991	4,249	4,385	1.4%	\$75
ELECTRONICS & APPL.	2,581	3,034	3,150	3,349	3,648	3,793	3,266	3,104	3,203	-0.3%	\$55
BUILD. MATERIALS	20,404	31,515	36,634	37,124	36,608	37,615	34,974	35,509	36,645	-0.6%	\$624
FOOD & BEV. STORES	11,033	11,123	12,293	11,768	13,234	14,427	14,827	14,699	15,169	3.6%	\$258
DRUG/HEALTH STORES	3,922	3,120	3,653	3,457	3,876	4,032	4,188	4,000	4,128	1.8%	\$70
GASOLINE STATIONS	48,597	52,091	56,354	55,199	60,366	63,458	54,833	61,192	63,150	1.7%	\$1,076
APPAREL & ACCES.	8,357	7,978	8,074	8,168	8,247	8,188	7,563	7,965	8,220	-0.3%	\$140
SPECIALTY STORES	1,473	1,547	1,493	1,427	1,508	1,452	1,467	1,762	1,818	3.4%	\$31
GEN MERCH. STORES	62,828	62,986	65,865	73,290	72,567	76,488	74,178	73,761	76,122	2.3%	\$1,297
MISC RETAILERS	13,913	19,732	18,584	21,014	17,772	17,949	11,560	11,680	12,054	-8.9%	\$205
NONSTORE RETAILERS	410	381	340	214	237	301	561	612	632	12.5%	\$11
RESTAURANTS & BARS	30,516	32,368	33,698	36,847	39,988	41,647	39,921	40,666	41,967	3.8%	\$715
RETAIL SALES TOTAL	278,544	300,372	316,569	333,807	339,421	355,894	327,246	362,593	374,196	2.8%	\$6,375

RETAIL OUTLETS	03	04	05	06	07	08	09	10	11	GROWTH	PER OUTLET SALES
MOTOR VEH. & PARTS	35	37	38	36	37	35	35	34	35	-2.2%	\$3,041,025
FURN & HOME FURN	13	14	15	14	13	15	15	17	17	2.5%	\$249,928
ELECTRONICS & APPL.	10	13	12	11	10	9	8	7	8	-10.2%	\$443,439
BUILD. MATERIALS	29	28	28	25	22	23	20	20	20	-6.5%	\$1,775,445
FOOD & BEV. STORES	19	17	23	23	25	28	31	29	28	4.7%	\$506,862
DRUG/HEALTH STORES	14	15	17	18	21	21	16	14	14	-3.8%	\$285,699
GASOLINE STATIONS	44	43	43	41	38	34	35	35	36	-4.0%	\$1,748,330
APPAREL & ACCES.	30	32	34	34	33	32	29	30	30	-2.5%	\$265,490
SPECIALTY STORES	27	29	23	23	26	29	26	29	29	4.7%	\$60,759
GEN MERCH. STORES	19	20	19	22	23	25	26	30	30	9.6%	\$2,458,713
MISC RETAILERS	204	198	187	179	167	148	147	129	130	-7.2%	\$90,541
NONSTORE RETAILERS	23	22	17	19	36	42	40	45	45	21.5%	\$13,600
RESTAURANTS & BARS	94	91	91	98	90	88	88	87	88	-0.9%	\$467,425
RETAIL OUTLETS TOTAL	561	559	547	543	541	529	519	506	510	-1.5%	\$716,587

CITY TREND (YR)	03	04	05	06	07	08	09	10	11	5 YR GROWTH
POPULATION	55,618	56,024	55,965	56,202	56,353	56,445	56,810	56,880	56,950	0.3%
SALES PER OUTLET(\$)	\$496,514	\$537,338	\$578,736	\$614,746	\$627,395	\$672,768	\$630,531	\$716,587	\$733,717	4.4%

Summary: The Performance Rank of 2, measuring sales growth in the most recent year, is above average. Over the past 10 yrs, the Growth Persistence Index (71.4%) has been high, while the 5 yr Relative Strength Ratio of 1.02 is above the state norm of 1.0. In total sales, the county's rank is 66, while the Per Capita Sales Rank is 123. Population Growth has averaged 0.32% over the past 5 yrs, compared to statewide norm of 1.8%.

Per Outlet Sales Rank is 55, representing avg sales per outlet of \$716,587. The annual growth rate over the past 5 yrs for Per Outlet Sales has been 4.4%. Note: Growth Rates are annual for period 2005-2010. Sales & outlet data for 2011 are forecasts and subject to future adjustment.

ANDREWS COUNTY

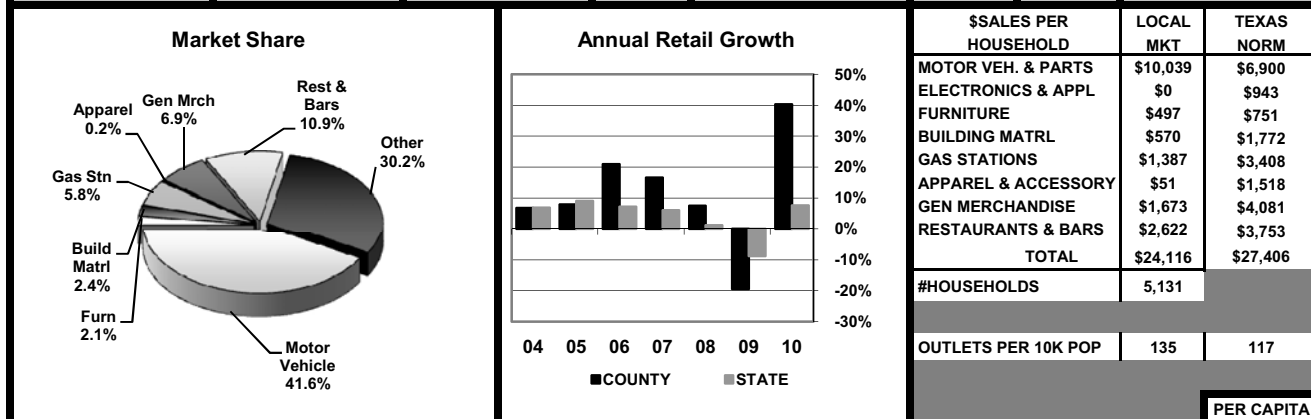
RATING
(HIGH)



SALES REPORT & RANKINGS

PERFORMANCE RANK	GROWTH PERSISTENCE	RELATIVE STRENGTH	SALES RANK	PER CAPITA SALES RANK	STATE SALES%	5 YR GROWTH RATES	
						SALES	POPULATION
1	71.4%	1.52	124	61	0.05%	11.3%	2.3%

OUTLET GROWTH LAST 5 YRS	OUTLETS RANK	% STATEWIDE OUTLETS	POP. RANK	PER OUTLET SALES RANK	MEDIAN AGE	HS HOLD SIZE	% STATEWIDE POPULATION
2.7%	137	0.07%	144	86	34	2.80	0.06%



RETAIL SALES (\$000)	03	04	05	06	07	08	09	10	11	GROWTH	PER CAPITA SALES
MOTOR VEH. & PARTS	25,896	27,436	24,001	30,194	37,581	32,108	25,677	49,437	51,513	15.5%	\$3,460
FURN & HOME FURN	491	460	684	991	1,089	1,149	1,664	2,448	2,550	29.0%	\$171
ELECTRONICS & APPL.										N.A.	\$0
BUILD. MATERIALS			1,908	2,714	2,967	3,427	2,831	2,808	2,926	8.0%	\$197
FOOD & BEV. STORES	1,910	1,928	2,105	2,231		4,144	4,159	4,617	4,811	17.0%	\$323
DRUG/HEALTH STORES						43				N.A.	\$0
GASOLINE STATIONS	4,518	4,654	5,585	6,994	7,559	7,717	7,226	6,832	7,119	4.1%	\$478
APPAREL & ACCES.	130	123	161	215	251	268	217	249	260	9.2%	\$17
SPECIALTY STORES	238	269	275	308	415	469	427	550	573	14.9%	\$39
GEN MERCH. STORES	6,346	6,478	7,130	8,457	8,373	8,644	7,940	8,241	8,587	2.9%	\$577
MISC RETAILERS	12,898	14,807	18,366	21,458	28,082	34,112	22,870	30,644	31,931	10.8%	\$2,145
NONSTORE RETAILERS	26	14			11	10	13	23	24	N.A.	\$2
RESTAURANTS & BARS	7,819	8,137	9,171	10,336	11,465	13,031	11,648	12,914	13,457	7.1%	\$904
RETAIL SALES TOTAL	60,273	64,305	69,385	83,896	97,794	105,123	84,671	118,762	123,750	11.3%	\$8,313

RETAIL OUTLETS	03	04	05	06	07	08	09	10	11	GROWTH	PER OUTLET SALES
MOTOR VEH. & PARTS	11	11	10	9	7	7	7	11	10	1.9%	\$4,494,229
FURN & HOME FURN	4	5	6	6	7	7	8	7	8	3.1%	\$349,645
ELECTRONICS & APPL.	3	3	3	3	3	2	3	3	3	0.0%	N.A.
BUILD. MATERIALS	3	3	4	5	8	7	6	7	7	11.8%	\$401,118
FOOD & BEV. STORES	5	5	5	4	3	8	9	10	10	14.9%	\$461,684
DRUG/HEALTH STORES	3	3	3	2	3	4	2	3	3	0.0%	N.A.
GASOLINE STATIONS	11	11	11	10	9	7	7	8	7	-6.2%	\$854,048
APPAREL & ACCES.	20	16	15	14	16	17	20	22	21	8.0%	\$11,321
SPECIALTY STORES	13	10	9	8	7	8	8	7	8	-4.9%	\$78,619
GEN MERCH. STORES	4	4	6	5	5	6	5	6	6	0.0%	\$1,373,420
MISC RETAILERS	60	61	59	61	53	53	55	56	59	-1.0%	\$547,208
NONSTORE RETAILERS	4	4	2	2	6	8	9	11	12	40.6%	\$2,112
RESTAURANTS & BARS	35	35	36	35	35	36	40	42	43	3.1%	\$307,480
RETAIL OUTLETS TOTAL	176	171	169	164	162	170	179	193	197	2.7%	\$615,347

CITY TREND (YR)	03	04	05	06	07	08	09	10	11	5 YR GROWTH
POPULATION	12,946	12,893	12,763	13,154	13,320	13,908	14,156	14,287	14,419	2.3%
SALES PER OUTLET(\$)	\$342,460	\$376,052	\$410,563	\$511,562	\$603,666	\$618,368	\$473,022	\$615,347	\$628,173	8.4%

Summary: The Performance Rank of 1, measuring sales growth in the most recent year, is high. Over the past 10 yrs, the Growth Persistence Index (71.4%) has been high, while the 5 yr Relative Strength Ratio of 1.52 is above the state norm of 1.0. In total sales, the county's rank is 124, while the Per Capita Sales Rank is 61. Population Growth has averaged 2.28% over the past 5 yrs, compared to statewide norm of 1.8%.

Per Outlet Sales Rank is 86, representing avg sales per outlet of \$615,347. The 5 yr growth rate for Per Outlet Sales has been 8.4%. Note: Growth Rates are annual for period 2005-2010. Sales & outlet data for 2011 are forecasts and subject to future adjustment.

ANGELINA COUNTY

RATING
(ABOVE AVG)



SALES REPORT & RANKINGS

PERFORMANCE RANK	GROWTH PERSISTENCE	RELATIVE STRENGTH	SALES RANK	PER CAPITA SALES RANK	STATE SALES%	5 YR GROWTH RATES	
						SALES	POPULATION
3	47.6%	1.09	41	45	0.33%	4.2%	0.5%

OUTLET GROWTH LAST 5 YRS	OUTLETS RANK	% STATEWIDE OUTLETS	POP. RANK	PER OUTLET SALES RANK	MEDIAN AGE	HS HOLD SIZE	% STATEWIDE POPULATION
0.2%	44	0.34%	44	42	34	2.70	0.33%

Market Share

- Motor Vehicle: 21.9%
- Other: 15.8%
- Rest & Bars: 13.4%
- Gen Mrch: 21.4%
- Gas Stn: 11.3%
- Build Matrl: 8.9%
- Furn: 2.7%
- Apparel: 4.6%

Annual Retail Growth

Legend: ■ COUNTY, ■ STATE

\$SALES PER HOUSEHOLD	LOCAL MKT	TEXAS NORM
MOTOR VEH. & PARTS	\$5,736	\$6,900
ELECTRONICS & APPL	\$853	\$943
FURNITURE	\$700	\$751
BUILDING MATRL	\$2,343	\$1,772
GAS STATIONS	\$2,962	\$3,408
APPAREL & ACCESSORY	\$1,199	\$1,518
GEN MERCHANDISE	\$5,601	\$4,081
RESTAURANTS & BARS	\$3,503	\$3,753
TOTAL	\$26,193	\$27,406
#HOUSEHOLDS	31,257	
OUTLETS PER 10K POP	116	117

RETAIL SALES (\$000)											GROWTH	PER CAPITA SALES
	03	04	05	06	07	08	09	10	11			
MOTOR VEH. & PARTS	174,815	173,975	194,670	203,466	228,384	202,686	145,001	173,573	179,301	-2.3%	\$2,065	
FURN & HOME FURN	16,291	18,831	21,054	23,480	21,265	20,376	20,490	21,186	21,885	0.1%	\$252	
ELECTRONICS & APPL.	12,287	19,464	18,303	19,594	21,001	25,389	26,127	25,816	26,668	7.1%	\$307	
BUILD. MATERIALS	53,038	58,301	66,778	69,667	68,107	71,982	66,431	70,904	73,244	1.2%	\$843	
FOOD & BEV. STORES	26,495	26,113	28,291	26,981	36,609	39,048	42,475	41,548	42,919	8.0%	\$494	
DRUG/HEALTH STORES	6,810	6,422	6,602	6,608	6,179	7,089	7,995	8,319	8,594	4.7%	\$99	
GASOLINE STATIONS	43,284	46,062	54,113	81,621	99,635	114,137	83,167	89,629	92,587	10.6%	\$1,066	
APPAREL & ACCES.	26,827	39,027	39,010	40,923	39,724	31,330	31,791	36,272	37,469	-1.4%	\$431	
SPECIALTY STORES	9,620	14,401	22,333	24,698	22,713	23,934	24,999	25,549	26,392	2.7%	\$304	
GEN MERCH. STORES	77,363	73,424	82,876	141,030	167,316	179,067	169,575	169,480	175,073	15.4%	\$2,016	
MISC RETAILERS	21,895	19,180	20,325	24,007	25,885	27,945	24,330	22,808	23,561	2.3%	\$271	
NONSTORE RETAILERS	1,853	1,622	1,689	1,771	1,646	2,230	4,166	1,494	1,543	-2.4%	\$18	
RESTAURANTS & BARS	71,888	78,619	87,900	92,910	99,926	104,410	103,169	105,994	109,491	3.8%	\$1,261	
RETAIL SALES TOTAL	542,466	575,442	643,943	756,757	838,388	849,623	749,716	792,571	818,726	4.2%	\$9,429	

RETAIL OUTLETS											GROWTH	PER OUTLET SALES
	03	04	05	06	07	08	09	10	11			
MOTOR VEH. & PARTS	79	79	78	81	80	79	80	84	85	1.5%	\$2,066,349	
FURN & HOME FURN	38	37	39	36	39	40	39	40	39	0.5%	\$529,653	
ELECTRONICS & APPL.	29	32	33	38	35	36	38	37	38	2.3%	\$697,726	
BUILD. MATERIALS	47	50	51	47	43	43	41	43	42	-3.4%	\$1,648,924	
FOOD & BEV. STORES	36	38	41	42	50	49	47	48	49	3.2%	\$865,591	
DRUG/HEALTH STORES	19	19	20	24	23	28	24	23	24	2.8%	\$361,701	
GASOLINE STATIONS	57	52	52	49	38	35	34	40	39	-5.1%	\$2,240,721	
APPAREL & ACCES.	80	86	96	101	103	101	107	113	115	3.3%	\$320,988	
SPECIALTY STORES	57	61	69	63	63	66	70	69	70	0.0%	\$370,272	
GEN MERCH. STORES	33	36	44	42	47	48	44	41	41	-1.4%	\$4,133,652	
MISC RETAILERS	234	248	245	238	227	223	219	194	196	-4.6%	\$117,568	
NONSTORE RETAILERS	25	26	28	37	46	55	57	67	68	19.1%	\$22,293	
RESTAURANTS & BARS	163	168	172	179	183	175	177	180	182	0.9%	\$588,853	
RETAIL OUTLETS TOTAL	897	932	968	977	977	978	977	979	988	0.2%	\$809,572	

CITY TREND (YR)	03	04	05	06	07	08	09	10	11	5 YR GROWTH
POPULATION	81,332	81,800	82,055	82,424	82,734	83,083	83,727	84,060	84,394	0.5%
SALES PER OUTLET(\$)	\$604,756	\$617,427	\$665,230	\$774,572	\$858,125	\$868,735	\$767,366	\$809,572	\$828,670	4.0%

Summary: The Performance Rank of 3, measuring sales growth in the most recent year, is average. Over the past 10 yrs, the Growth Persistence Index (47.6%) has been average, while the 5 yr Relative Strength Ratio of 1.09 is above the state norm of 1.0. In total sales, the county's rank is 41, while the Per Capita Sales Rank is 45. Population Growth has averaged 0.48% over the past 5 yrs, compared to statewide norm of 1.8%.

Per Outlet Sales Rank is 42, representing avg sales per outlet of \$809,572. The 5 yr growth rate for Per Outlet Sales has been 4.0%. Note: Growth Rates are annual for period 2005-2010. Sales & outlet data for 2011 are forecasts and subject to future adjustment.

SECTION B

LARGE CITIES RETAIL SALES REPORTS



PERFORMANCE RANK	GROWTH PERSISTENCE	RELATIVE STRENGTH	SALES RANK	PER CAPITA SALES RANK	STATE SALES%	5 YR GROWTH RATES	
						SALES	POPULATION
2	14.3%	0.97	28	156	0.58%	1.7%	0.2%

OUTLET GROWTH LAST 5 YRS	OUTLETS RANK	% STATEWIDE OUTLETS	POP. RANK	PER OUTLET SALES RANK	MEDIAN AGE	HS HOLD SIZE	% STATEWIDE POPULATION
-0.9%	25	0.48%	25	96	31	2.53	0.46%

Market Share

Annual Retail Growth

\$SALES PER HOUSEHOLD	LOCAL MKT	TEXAS NORM
MOTOR VEH. & PARTS	6,865	\$6,900
ELECTRONICS & APPL	\$823	\$943
FURNITURE	\$796	\$751
BUILDING MATRL	\$2,707	\$1,772
GAS STATIONS	\$3,574	\$3,408
APPAREL & ACCESSORY	\$1,223	\$1,518
GEN MERCHANDISE	\$6,339	\$4,081
RESTAURANTS & BARS	\$4,522	\$3,753
TOTAL	\$31,489	\$27,406
#HOUSEHOLDS	46,293	
OUTLETS PER 10K POP	121	117

RETAIL SALES (\$000)	03	04	05	06	07	08	09	10	11	GROWTH	PER CAPITA SALES
MOTOR VEH. & PARTS	364,755	372,848	363,344	361,207	427,516	351,006	265,548	307,960	317,815	-3.3%	\$2,634
FURN & HOME FURN	28,183	28,749	35,051	36,066	37,503	44,039	34,722	35,690	36,832	0.4%	\$305
ELECTRONICS & APPL.	23,955	25,693	39,593	41,526	43,316	43,139	36,904	36,906	38,087	-1.4%	\$316
BUILD. MATERIALS	88,289	96,074	101,717	112,746	122,799	127,752	113,614	121,441	125,327	3.6%	\$1,039
FOOD & BEV. STORES	65,816	67,611	66,817	70,394	67,559	62,347	64,207	65,104	67,188	-0.5%	\$557
DRUG/HEALTH STORES	19,653	21,575	26,488	29,385	28,823	30,908	23,908	26,164	27,001	-0.2%	\$224
GASOLINE STATIONS	66,829	68,998	82,195	88,583	111,476	146,966	132,503	160,312	165,442	14.3%	\$1,371
APPAREL & ACCES.	44,851	49,816	52,796	55,767	54,505	53,159	49,262	54,848	56,603	0.8%	\$469
SPECIALTY STORES	53,260	53,250	55,174	54,190	48,209	52,418	52,746	54,207	55,942	-0.4%	\$464
GEN MERCH. STORES	241,502	244,608	252,312	269,460	295,249	306,117	286,274	284,343	293,442	2.4%	\$2,432
MISC RETAILERS	41,519	46,396	49,395	29,481	49,169	45,044	55,676	58,111	59,970	3.3%	\$497
NONSTORE RETAILERS	7,304	8,356	9,663	10,176	10,349	10,431	8,179	4,554	4,700	-14.0%	\$39
RESTAURANTS & BARS	142,155	151,494	163,086	174,835	182,877	194,861	194,825	202,866	209,358	4.5%	\$1,735
RETAIL SALES TOTAL	1,188,069	1,235,467	1,297,629	1,333,815	1,479,351	1,468,187	1,318,369	1,412,506	1,457,706	1.7%	\$12,080

RETAIL OUTLETS	03	04	05	06	07	08	09	10	11	GROWTH	PER OUTLET SALES
MOTOR VEH. & PARTS	97	95	104	107	112	109	105	94	94	-2.0%	\$3,276,175
FURN & HOME FURN	49	50	49	47	45	48	46	49	50	0.0%	\$728,365
ELECTRONICS & APPL.	45	47	50	48	45	44	46	49	50	-0.4%	\$753,180
BUILD. MATERIALS	41	42	44	49	48	45	41	42	43	-0.9%	\$2,891,454
FOOD & BEV. STORES	82	86	88	91	76	60	60	58	59	-8.0%	\$1,122,486
DRUG/HEALTH STORES	50	55	61	65	62	58	54	49	50	-4.3%	\$533,960
GASOLINE STATIONS	76	69	69	71	81	89	90	91	92	5.7%	\$1,761,670
APPAREL & ACCES.	136	139	149	145	155	156	149	143	145	-0.8%	\$383,551
SPECIALTY STORES	141	136	129	118	108	99	98	94	95	-6.1%	\$576,670
GEN MERCH. STORES	44	49	47	48	54	50	45	45	45	-0.9%	\$6,318,738
MISC RETAILERS	358	333	338	321	319	315	330	316	319	-1.3%	\$183,894
NONSTORE RETAILERS	46	43	50	63	83	88	80	73	75	7.9%	\$62,389
RESTAURANTS & BARS	288	293	299	310	307	313	309	309	312	0.7%	\$656,524
RETAIL OUTLETS TOTAL	1,453	1,437	1,477	1,483	1,495	1,474	1,453	1,412	1,429	-0.9%	\$1,000,358

CITY TREND (YR)	03	04	05	06	07	08	09	10	11	5 YR GROWTH
POPULATION	114,703	115,897	115,792	115,914	116,670	116,732	116,818	116,926	117,120	0.2%
SALES PER OUTLET(\$)	\$817,666	\$859,755	\$878,557	\$899,403	\$989,532	\$996,056	\$907,343	\$1,000,358	\$1,020,088	2.6%

Summary: The Performance Rank of 2, measuring sales growth in the most recent year, is above average. Over the past 10 yrs, the Growth Persistence Index (14.3%) has been low, while the 5 yr Relative Strength Ratio of 0.97 is below the state norm of 1.0. In total sales, the city's rank is 28, while the Per Capita Sales Rank is 156. Population Growth has averaged 0.2% over the past 5 yrs, compared to statewide norm of 1.8%.

Per Outlet Sales Rank is 96, representing avg sales per outlet of \$1,000,358. The annual growth rate over the past 5 yrs for Per Outlet Sales has been 2.6%. Note: Growth Rates are annual for period 2005-2010. Sales & outlet data for 2011 are forecasts and subject to future adjustment.



PERFORMANCE RANK	GROWTH PERSISTENCE	RELATIVE STRENGTH	SALES RANK	PER CAPITA SALES RANK	STATE SALES%	5 YR GROWTH RATES	
						SALES	POPULATION
2	57.1%	0.89	71	26	0.20%	0.2%	2.7%

OUTLET GROWTH LAST 5 YRS	OUTLETS RANK	% STATEWIDE OUTLETS	POP. RANK	PER OUTLET SALES RANK	MEDIAN AGE	HS HOLD SIZE	% STATEWIDE POPULATION
6.8%	67	0.20%	152	149	32	1.86	0.07%

Market Share

- Rest & Bars 31.2%
- Other 23.8%
- Motor Vehicle 21.7%
- Gen Mrch 8.1%
- Apparel 2.7%
- Gas Stn 4.9%
- Build Matrl 2.3%
- Furn 5.2%

Annual Retail Growth

Legend: ■ CITY, ■ STATE

\$SALES PER HOUSEHOLD	LOCAL MKT	TEXAS NORM
MOTOR VEH. & PARTS	12,070	\$6,900
ELECTRONICS & APPL	\$1,588	\$943
FURNITURE	\$2,867	\$751
BUILDING MATRL	\$1,277	\$1,772
GAS STATIONS	\$2,718	\$3,408
APPAREL & ACCESSORY	\$1,495	\$1,518
GEN MERCHANDISE	\$4,524	\$4,081
RESTAURANTS & BARS	\$17,345	\$3,753
TOTAL	\$55,519	\$27,406
#HOUSEHOLDS	9,287	
OUTLETS PER 10K POP	352	117

RETAIL SALES (\$000)	03	04	05	06	07	08	09	10	11	GROWTH	PER CAPITA SALES
MOTOR VEH. & PARTS	64,097	28,852	83,810	201,076	135,949	158,909	73,196	108,095	112,094	5.2%	\$6,423
FURN & HOME FURN	33,476	35,564	35,485	38,605	34,675	31,134	24,927	25,677	26,627	-6.3%	\$1,526
ELECTRONICS & APPL.	26,430	28,824	22,119	16,890	15,459	15,669	14,508	14,224	14,750	-8.5%	\$845
BUILD. MATERIALS	10,510	11,340	13,544	23,011	20,941	17,621	12,222	11,433	11,856	-3.3%	\$679
FOOD & BEV. STORES	52,243	52,845	49,953	52,200	53,582	55,029	53,258	52,935	54,893	1.2%	\$3,145
DRUG/HEALTH STORES	2,332	2,219	2,020	880	621	775	707	771	800	-17.5%	\$46
GASOLINE STATIONS	7,583	16,481	17,127	21,287	15,432	26,503	21,131	24,338	25,239	7.3%	\$1,446
APPAREL & ACCES.	17,469	16,618	17,709	17,325	17,903	17,665	13,810	13,389	13,884	-5.4%	\$796
SPECIALTY STORES	10,434	11,298	9,946	9,818	7,952	6,785	5,683	4,446	4,611	-14.9%	\$264
GEN MERCH. STORES	32,430	42,543	44,527	45,389	46,903	44,819	41,491	40,516	42,015	-1.9%	\$2,408
MISC RETAILERS	62,390	71,900	76,810	59,102	50,537	49,280	38,141	45,468	47,150	-10.0%	\$2,702
NONSTORE RETAILERS	2,950	2,966	3,708	3,509	3,541	1,086	760	593	615	-30.7%	\$35
RESTAURANTS & BARS	44,236	143,130	116,721	83,291	49,527	166,489	149,862	155,339	161,086	5.9%	\$9,230
RETAIL SALES TOTAL	366,579	464,580	493,479	572,385	453,023	591,763	449,695	497,224	515,621	0.2%	\$29,546

RETAIL OUTLETS	03	04	05	06	07	08	09	10	11	GROWTH	PER OUTLET SALES
MOTOR VEH. & PARTS	21	22	24	21	22	18	20	21	20	-2.6%	\$5,147,374
FURN & HOME FURN	25	25	28	27	25	28	24	22	23	-4.7%	\$1,167,129
ELECTRONICS & APPL.	52	52	53	52	51	51	42	40	41	-5.5%	\$355,593
BUILD. MATERIALS	13	13	15	17	20	18	18	16	16	1.3%	\$714,572
FOOD & BEV. STORES	18	20	24	28	26	27	26	28	29	3.1%	\$1,890,520
DRUG/HEALTH STORES	21	21	20	16	13	16	18	17	18	-3.2%	\$45,382
GASOLINE STATIONS	15	15	14	12	10	9	7	7	7	-12.9%	\$3,476,917
APPAREL & ACCES.	46	46	49	53	46	49	45	44	45	-2.1%	\$304,285
SPECIALTY STORES	35	35	36	34	31	34	31	24	26	-7.8%	\$185,253
GEN MERCH. STORES	9	8	7	14	16	14	12	10	10	7.4%	\$4,051,631
MISC RETAILERS	120	116	108	105	104	98	97	99	101	-1.7%	\$459,270
NONSTORE RETAILERS	18	21	21	23	29	27	28	35	36	10.8%	\$16,955
RESTAURANTS & BARS	22	25	28	53	13	221	222	229	234	52.2%	\$678,334
RETAIL OUTLETS TOTAL	415	419	427	455	406	610	590	592	606	6.8%	\$839,905

CITY TREND (YR)	03	04	05	06	07	08	09	10	11	5 YR GROWTH
POPULATION	14,579	14,611	14,715	14,824	15,302	16,395	16,684	16,829	17,274	2.7%
SALES PER OUTLET(\$)	883,324	1,108,783	1,155,688	1,257,988	1,115,821	970,103	762,195	839,905	850,860	-6.2%

Summary: The Performance Rank of 2, measuring sales growth in the most recent year, is above avg. Over the past 10 yrs, the Growth Persistence Index (57.1%) has been avg, while the 5 yr Relative Strength Ratio of 0.89 is below the state norm of 1.0. In total sales, the city's rank is 71, while the Per Capita Sales Rank is 26. Population Growth has averaged 2.7% over the past 5 yrs, compared to statewide norm of 1.8%.

Per Outlet Sales Rank is 149, representing avg sales per outlet of \$839,905. The annual growth rate over the past 5 yrs for Per Outlet Sales has been -6.2%. Note: Growth Rates are annual for period 2005-2010. Sales & outlet data for 2011 are forecasts and subject to future adjustment.

SECTION C

SUMMARY COUNTY RANKINGS & INDICES

COUNTY RETAIL MARKETS

SUMMARY OF RANKINGS & INDICIES

COUNTY	PERFORMANCE RANK	GROWTH PERSISTENCE	RELATIVE STRENGTH	SALES RANK	PER CAPITA SALES RANK	% STATEWIDE SALES	SALES GROWTH LAST 5 YRS	POP GROWTH LAST 5 YRS
ANDERSON	2	71.4%	1.02	66	123	0.149%	2.75%	0.32%
ANDREWS	1	71.4%	1.52	124	61	0.049%	11.35%	2.28%
ANGELINA	3	47.6%	1.09	41	45	0.325%	4.24%	0.48%
ARANSAS	4	52.4%	1.09	96	92	0.077%	4.21%	0.87%
ARCHER	3	61.9%	0.77	178	177	0.017%	-2.88%	0.75%
ARMSTRONG	4	28.6%	0.45	243	247	0.001%	-12.53%	0.34%
ATASCOSA	2	66.7%	1.08	81	136	0.109%	4.05%	1.52%
AUSTIN	4	57.1%	1.13	100	122	0.072%	4.98%	0.99%
BAILEY	5	9.5%	0.76	205	207	0.008%	-3.16%	-0.51%
BANDERA	5	19.0%	0.80	155	206	0.026%	-2.12%	1.40%
BASTROP	1	42.9%	1.26	46	62	0.256%	7.34%	1.71%
BAYLOR	5	23.8%	0.89	212	185	0.006%	0.01%	-0.33%
BEE	2	76.2%	1.26	97	149	0.076%	7.20%	0.02%
BELL	2	90.5%	0.99	15	30	1.245%	2.21%	1.83%
BEXAR	2	57.1%	1.01	4	29	7.350%	2.69%	1.98%
BLANCO	1	76.2%	1.21	167	155	0.021%	6.39%	0.21%
BORDEN	1	52.4%	1.42	251	251	0.000%	9.82%	-0.28%
BOSQUE	5	33.3%	0.90	170	219	0.020%	0.27%	0.37%
BOWIE	4	47.6%	0.99	37	21	0.436%	2.33%	0.49%
BRAZORIA	5	71.4%	1.15	20	83	0.993%	5.41%	2.47%
BRAZOS	4	61.9%	1.03	27	40	0.736%	3.03%	2.61%
BREWSTER	4	52.4%	1.07	154	109	0.026%	3.88%	0.47%
BRISCOE	5	28.6%	0.57	238	229	0.001%	-8.36%	1.22%
BROOKS	5	33.3%	0.89	171	131	0.019%	0.07%	0.25%
BROWN	4	38.1%	0.88	74	81	0.124%	-0.08%	0.30%
BURLESON	3	71.4%	1.18	139	168	0.036%	5.92%	0.37%
BURNET	3	76.2%	1.02	56	37	0.184%	2.84%	2.45%
CALDWELL	2	71.4%	1.26	86	121	0.099%	7.32%	1.17%
CALHOUN	2	47.6%	0.87	108	103	0.061%	-0.41%	0.23%
CALLAHAN	3	71.4%	1.22	181	217	0.016%	6.63%	0.68%
CAMERON	4	52.4%	0.99	16	113	1.100%	2.25%	1.06%
CAMP	5	38.1%	0.66	150	159	0.028%	-5.63%	0.61%
CARSON	1	61.9%	1.23	189	166	0.013%	6.74%	-0.44%
CASS	1	81.0%	1.17	95	127	0.079%	5.64%	0.10%
CASTRO	4	33.3%	1.02	198	200	0.010%	2.82%	-0.24%
CHAMBERS	5	47.6%	0.83	104	164	0.070%	-1.32%	1.66%
CHEROKEE	2	28.6%	0.96	79	147	0.113%	1.51%	0.43%
CHILDRESS	3	33.3%	1.13	156	74	0.025%	4.94%	0.04%
CLAY	4	14.3%	0.82	163	161	0.023%	-1.49%	-0.42%
COCHRAN	4	38.1%	0.88	230	236	0.002%	-0.21%	-0.16%
COKE	4	42.9%	1.05	223	223	0.003%	3.39%	-0.61%
COLEMAN	5	38.1%	0.94	175	169	0.017%	1.23%	-0.50%
COLLIN	3	57.1%	1.09	6	17	3.772%	4.24%	4.01%
COLLINGSWORTH	3	57.1%	1.05	222	215	0.004%	3.52%	-0.01%
COLORADO	3	0.0%	0.71	110	116	0.059%	-4.47%	0.67%
COMAL	3	85.7%	1.33	34	41	0.453%	8.48%	3.89%
COMANCHE	4	33.3%	1.03	161	178	0.024%	2.98%	0.31%
CONCHO	2	66.7%	1.10	217	189	0.006%	4.31%	-0.41%
COOKE	3	38.1%	0.90	63	42	0.158%	0.26%	0.76%
CORYELL	2	66.7%	0.96	67	171	0.145%	1.61%	0.17%
COTTLE	4	52.4%	1.23	241	238	0.001%	6.68%	0.51%
CRANE	1	76.2%	1.54	207	176	0.007%	11.67%	1.64%
CROCKETT	1	52.4%	0.74	204	170	0.008%	-3.48%	1.11%
CROSBY	1	66.7%	1.31	118	2	0.055%	8.17%	-0.72%
CULBERSON	1	76.2%	1.45	131	1	0.040%	10.26%	-1.51%
DALLAM	1	76.2%	1.50	144	15	0.031%	11.02%	0.37%
DALLAS	4	0.0%	0.92	2	28	10.872%	0.79%	1.27%
DAWSON	3	38.1%	0.94	149	167	0.028%	1.13%	-0.53%
DE WITT	1	47.6%	1.02	127	142	0.047%	2.77%	-0.41%
DEAF SMITH	2	66.7%	1.04	123	119	0.050%	3.29%	0.10%
DELTA	5	23.8%	0.82	233	248	0.002%	-1.63%	0.81%
DENTON	3	76.2%	0.97	9	90	2.043%	1.88%	3.66%
DICKENS	5	66.7%	1.01	225	216	0.003%	2.65%	-1.42%
DIMMIT	1	57.1%	1.41	146	99	0.029%	9.74%	-0.16%
DONLEY	1	61.9%	1.24	214	191	0.006%	6.89%	0.49%
DUVAL	1	71.4%	1.42	172	188	0.019%	9.89%	-0.89%

SECTION D

SUMMARY CITY RANKINGS & INDICES

CITY RETAIL MARKETS

SUMMARY OF RANKINGS & INDICIES

CITY	PERFORMANCE RANK	GROWTH PERSISTENCE	RELATIVE STRENGTH	SALES RANK	PER CAPITA SALES RANK	% STATEWIDE SALES	SALES GROWTH LAST 5 YRS	POP GROWTH LAST 5 YRS
Abilene	2	14.3%	0.97	28	156	0.58%	1.71%	0.20%
Addison	2	57.1%	0.89	71	26	0.20%	0.15%	2.72%
Alamo	3	71.4%	1.60	169	229	0.07%	12.54%	1.96%
Alamo Heights	5	4.8%	0.77	291	263	0.02%	-2.67%	1.56%
Alice	1	61.9%	1.40	118	123	0.11%	9.60%	0.81%
Allen	2	95.2%	1.62	54	204	0.31%	12.83%	3.55%
Alpine	4	66.7%	1.15	289	222	0.02%	5.31%	0.71%
Alvin	5	52.4%	0.89	91	96	0.16%	0.18%	1.88%
Amarillo	3	28.6%	0.95	11	116	1.13%	1.41%	0.80%
Andrews	1	76.2%	1.60	217	176	0.05%	12.47%	2.82%
Angleton	5	61.9%	0.91	148	198	0.08%	0.53%	1.58%
Aransas Pass	2	61.9%	1.02	159	69	0.08%	2.82%	2.38%
Arlington	2	28.6%	0.92	8	181	1.65%	0.74%	1.00%
Athens	3	0.0%	0.85	163	120	0.07%	-0.79%	0.05%
Atlanta	1	85.7%	1.35	202	44	0.05%	8.69%	0.03%
Austin	3	9.5%	0.94	4	154	4.02%	1.28%	2.98%
Azle	5	57.1%	1.42	191	149	0.06%	9.86%	2.42%
Balch Springs	4	66.7%	1.45	137	191	0.09%	10.35%	1.51%
Balcones Heights	2	52.4%	0.83	201	15	0.05%	-1.26%	1.25%
Bandera	3	42.9%	0.82	323	43	0.01%	-1.64%	3.03%
Bastrop	1	42.9%	1.43	73	8	0.20%	9.99%	2.21%
Bay City	5	33.3%	0.97	164	207	0.07%	1.90%	0.40%
Baytown	4	47.6%	0.98	48	152	0.36%	2.04%	1.09%
Beaumont	5	57.1%	0.93	18	104	0.69%	0.88%	0.11%
Bedford	1	71.4%	0.82	82	217	0.19%	-1.47%	1.45%
Bee Cave	2	100.0%	1.99	120	3	0.11%	17.61%	7.55%
Beeville	2	95.2%	1.28	177	173	0.06%	7.54%	0.13%
Bellaire	5	42.9%	0.88	246	303	0.03%	-0.26%	2.66%
Bellmead	3	52.4%	1.20	136	39	0.09%	6.16%	0.66%
Belton	4	33.3%	1.04	138	150	0.09%	3.22%	2.29%
Benbrook	1	66.7%	1.04	234	310	0.04%	3.21%	1.27%
Beverly Hills	4	19.0%	0.83	274	25	0.03%	-1.20%	0.47%
Big Spring	2	66.7%	1.05	122	194	0.11%	3.49%	0.75%
Boerne	1	81.0%	1.69	99	21	0.14%	13.76%	7.93%
Bonham	5	28.6%	0.77	238	225	0.04%	-2.90%	-0.16%
Borger	4	28.6%	0.97	209	221	0.05%	1.75%	0.52%
Bowie	4	28.6%	1.32	277	174	0.03%	8.31%	0.47%
Brady	4	42.9%	1.06	270	157	0.03%	3.57%	-0.03%
Brazoria	4	33.3%	1.18	310	135	0.02%	5.97%	1.91%
Breckenridge	1	57.1%	1.15	290	206	0.02%	5.35%	0.14%
Brenham	5	57.1%	1.09	115	70	0.12%	4.28%	1.11%
Bridge City	5	33.3%	1.06	288	270	0.02%	3.68%	-0.04%
Bridgeport	1	52.4%	0.87	273	178	0.03%	-0.38%	1.98%
Brownfield	5	42.9%	0.75	304	299	0.02%	-3.40%	-0.14%
Brownsville	4	14.3%	0.94	29	248	0.57%	1.21%	1.38%
Brownwood	2	38.1%	0.88	130	143	0.10%	-0.14%	-0.14%
Bryan	2	76.2%	0.99	55	195	0.31%	2.27%	1.44%
Buda	3	42.9%	1.12	140	27	0.09%	4.70%	12.67%
Bulverde	4	71.4%	1.86	262	139	0.03%	16.03%	5.78%
Burkburnett	1	61.9%	2.17	244	253	0.03%	19.64%	0.71%
Burleson	4	71.4%	1.09	72	125	0.20%	4.24%	4.03%
Burnet	2	76.2%	0.99	275	187	0.03%	2.33%	2.32%
Caldwell	2	42.9%	1.37	300	151	0.02%	9.08%	1.54%
Cameron	4	42.9%	1.04	315	282	0.02%	3.30%	1.00%
Canton	3	19.0%	0.97	205	20	0.05%	1.73%	0.96%
Canyon	4	71.4%	1.14	252	293	0.03%	5.18%	1.40%
Carrizo Springs	1	57.1%	1.18	296	218	0.02%	5.80%	0.15%
Carrollton	1	47.6%	1.00	35	208	0.52%	2.47%	2.54%
Carthage	1	57.1%	1.03	207	75	0.05%	3.05%	0.49%
Castle Hills	3	28.6%	0.85	292	144	0.02%	-0.77%	1.92%
Cedar Hill	4	57.1%	1.20	84	186	0.19%	6.29%	1.82%
Cedar Park	3	71.4%	1.49	83	251	0.19%	10.89%	7.03%
Center	2	61.9%	1.02	180	35	0.06%	2.91%	1.08%
Childress	3	33.3%	1.15	280	219	0.02%	5.26%	0.39%
Clear Lk. Shores	5	71.4%	0.89	258	7	0.03%	0.02%	0.42%
Cleburne	4	28.6%	0.94	101	162	0.14%	1.14%	0.99%