



# City of Lufkin Retail Market Analysis

September 2013



catalyst

Jerry Huffman  
President/CEO  
1615 S. Chestnut  
Lufkin, Texas 75901

Mr. Huffman,

Catalyst Commercial, Inc. has been retained by the City of Lufkin, the Lufkin/Angelina County Chamber of Commerce, and the City of Lufkin Economic Development Corporation to conduct a Market Analysis. The purpose of the retail market analysis is to develop a baseline of information that would be beneficial to the City of Lufkin for planning, economic development, and strategic planning.

As part of this process catalyst conducted research on the retail trading patterns from retail located within the City of Lufkin and the surrounding area to delineate the City of Lufkin's Primary Trade Area (PTA). Demographic and psychographic profiles of this PTA were analyzed to determine customer spending and retail demand within the Lufkin retail market. The results of this Market Analysis.

We look forward to working with the City of Lufkin in its continued success.

Best Regards,

Jason Claunch  
President  
Catalyst Commercial, Inc.

**HISTORICAL BACKGROUND**

Lufkin, Texas holds the county seat of Angelina county and serves as the regional economic hub of East Texas. Lufkin was founded in 1882 and has grown over the years because of its strategic position within the region and capitalization of its natural and human capital. Lufkin was founded as a railroad station and then supplied the region from its vast inventory of lumber. Annually, Lufkin holds the Texas State Forest Festival which brings nearly 30,000 people from 102 counties of Texas and six different states to the City of Lufkin.

As the city has matured into the latter part of the 20th century the city developed a diversified economic base outside of harvesting timber and the manufacturing of forest products, including oilfield services, machinery, poultry, trucking and flooring, grocery distribution, and medical services. Today, Lufkin is estimated to have a population of 35,390.

**PRIMARY TRADE AREA**

The Lufkin Primary Trade Area (PTA) is home to 80,901 people. This PTA is similar in size to a 18 minute drive time or an 11 mile ring. The average rural market in East Texas has a trade area size of approximately 30-45 minutes and 20-25 miles. The people that make up this PTA currently have a median household income of \$37,212 and an average household income of \$52,094. The population of the PTA is expected to grow to 83,023 by 2017, a 2.6% increase. The average household size is 2.72 and the median age is 35.9. The population is 69.3% white, 22.6% Hispanic, and 23.5% of the population has a college degree.

**TRAFFIC COUNTS**

The traffic counts in Lufkin are highest along Loop 287 and US Highway 59. The highest counts are Loop 287 east of US Highway 59 at 58,000 vehicles per day (source: CoStar). The next highest count is south of Loop 225 on US Highway 59 at 44,574 vehicles per day (source: CoStar 2013).

**RETAIL SUMMARY**

Catalyst conducted a merchant matrix within the city limits of Lufkin. In this process, major retailers were mapped and categorized. The categories with the highest count of retailers are as follows:

1. Convenience Store (NAICS 445120) - 30 stores, Bank (NAICS 522110) - 23 stores, Office – Attorney (NAICS 541110) – 23 stores, Hair Cutter/Salon (NAICS 812112) - 19 stores, Hotel (NAICS 721110) - 18 stores, Financial Tax Service (NAICS 523930) – 18 stores

**VISITOR ECONOMY**

The City of Lufkin has three major visitor generators: 1. Ellen Trout Zoo - 120,000 visitors annually, 2. Texas State Forrest Festival – 25,000 visitors annually, and 3. Angelina College Events 250-500 visitors per event.

Local visitors spend approximately \$70/day and non-local visitors spend approximately \$90/day. A strong visitor economy can strengthen hotel demand, provide additional demand for retail and restaurants, and increase the footprint of the regional economy with entertainment uses. Catalyst recommends a strategy to strengthen visitor economy with additional entertainment and destination uses which enhance visitor traffic to Lufkin.

**WORKFORCE**

The City of Lufkin and the Lufkin ETJ has many companies with a high number of employees. The following are the five employers in Lufkin with more than 1,000 employees:

1. Brookshire Brothers LTD
2. GE (formerly Lufkin Industries)
3. Memorial Health Services
4. Pilgrim's Pride
5. Georgia-Pacific

The top five industries (by number of employees) in the City of Lufkin are:

1. Services - 9,737 employees
2. Retail Trade - 5,535 employees
3. Manufacturing - 2,488 employees
4. Government - 1,385 employees
5. Finance, Insurance, Real Estate - 1,070 employees

**MEDICAL**

Lufkin is a medical hub for Angelina County and the surrounding region. The largest medical center in Lufkin is the Woodland Heights Medical Center. Woodland Heights Medical Center is comprised of 149 beds, 205 physicians, and 550 employees.

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**DELINEATION OF PRIMARY TRADE AREA (CENSUS TRACTS)**

Understanding where your target customers originate from is a crucial step in any retail recruitment initiative. Retailers, developers and brokers have traditionally used radius rings and/or drive times to quickly compare prospective sites or markets against one another. However, such arbitrary measures do not accurately depict actual consumer trade patterns, and thus the data extrapolated from such arbitrary trade areas is often inaccurate.

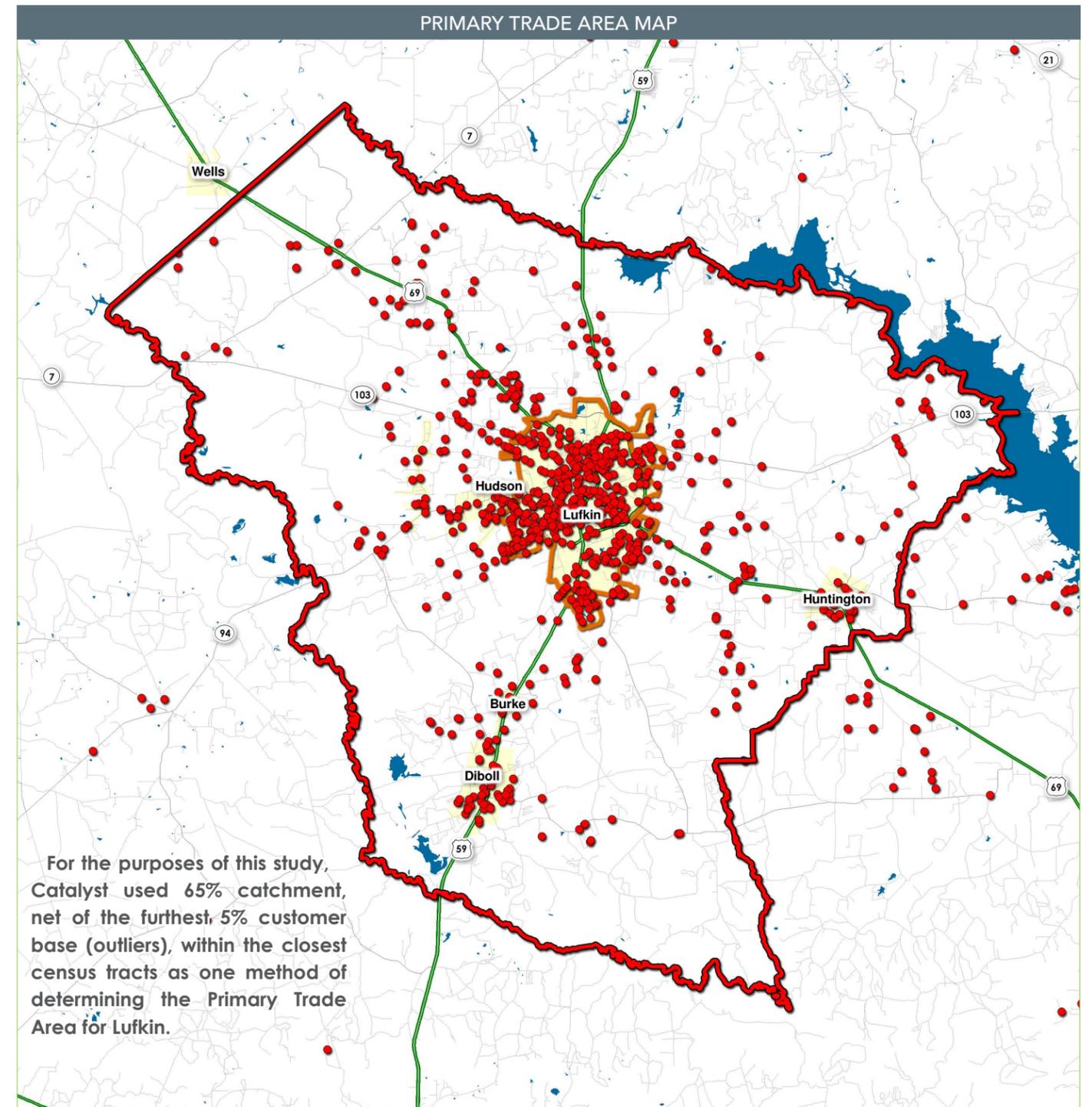
While useful in some contexts, concentric ring trade area methodology is inherently flawed because it assumes an evenly distributed population and doesn't take into account such factors as: geographical boundaries, demographic shifts, man-made (psychological) boundaries, alternative retail clusters and accessibility. Drive time analyses improve upon traditional concentric ring analyses by taking into account geographical boundaries and accessibility, but they still do not address psychological boundaries, population distribution and alternative retail clusters. They are, however, useful for understanding the impact from one region to another.

Accurate geographical delineation of the trade area in which retailers can reasonably expect to consistently attract customers is the first step in this process. Additionally, identifying the demographic profile of the consumers which are currently shopping at a specific location is helpful in understanding success factors, identifying potential complementary tenants, and developing marketing strategies for specific retail districts or clusters as well as individual businesses.

Catalyst delineated the Primary Trade Area (PTA) by collecting 3,100 customer intercepts between June 5, 2013 and June 7, 2013. Catalyst collected samples to determine the customer's point of origin in relation to various retail locations in and around Lufkin including:

1. Downtown Lufkin
2. Chick-fil-A, Cheddar's, and Chili's off Loop 287 between US Highway 59 and S Chestnut Street
3. Lufkin Mall
4. Outback Steakhouse off US Highway 59 north of Whitehouse Drive
5. Sam's Club and Walmart off N Brentwood Drive and US Highway 59
6. Belk's and Hobby Lobby off Whitehouse Drive

80% of customer samples were taken from the strong retail nodes on the south end of Lufkin off of Loop 287 and south of Loop 287 off US Highway 59. The remaining 20% samples were collected from Downtown and the Brookshire Brother's on the north end of Lufkin off Loop 287. The Downtown samples, which consisted of 10% of the total number of samples, align with the aggregate PTA and clusters of samples. It was an indication that Downtown is drawing from the entire PTA, and despite the strength of retail being found on the southernmost part of the city, it has not hindered the ability for downtown to draw customers.



(Source: Catalyst)

**DRIVE TIME ANALYSIS**

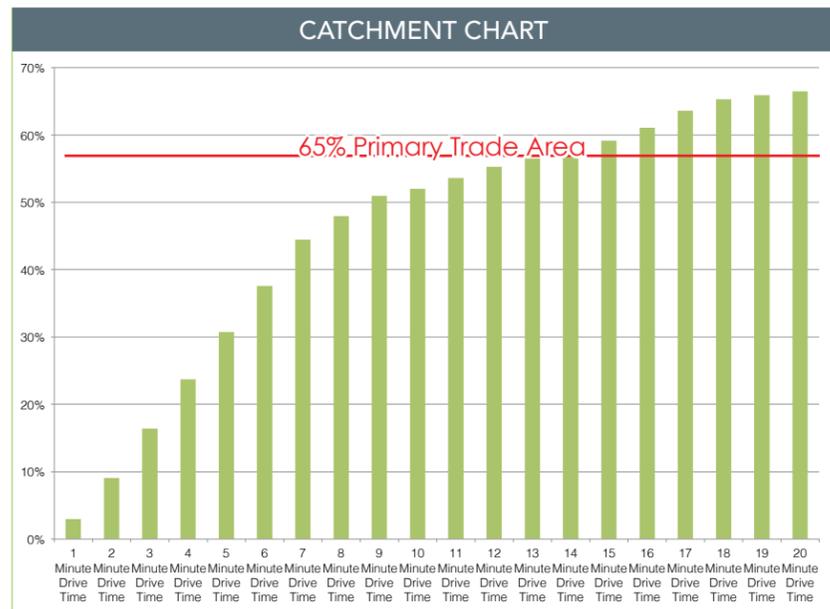
Drive time analysis is useful when understanding impact from one region or store to another, but is not as accurate in identifying the constraints of the actual Primary Trade Area (PTA) for the City of Lufkin. Drive time based trade areas are often used to analyze trade area characteristics and are useful for comparison of proposed sites and against both existing store locations, as well as, other prospective site locations.

Errors using drive time analysis are often considered acceptable, however, notation must be made to the limitation when customer samples are available and a more accurate trade area can be delineated for the Lufkin PTA.

Using a drive time geography, an 18 minute drive time from the intersection of West Frank Avenue and Angelina Street captures approximately 65.3% of the customer samples collected by Catalyst.

As seen in the map to the right, the Lufkin Drive Time geography is influenced by US Highway 69 and US Highway 59.

PRIMARY TRADE AREA ►

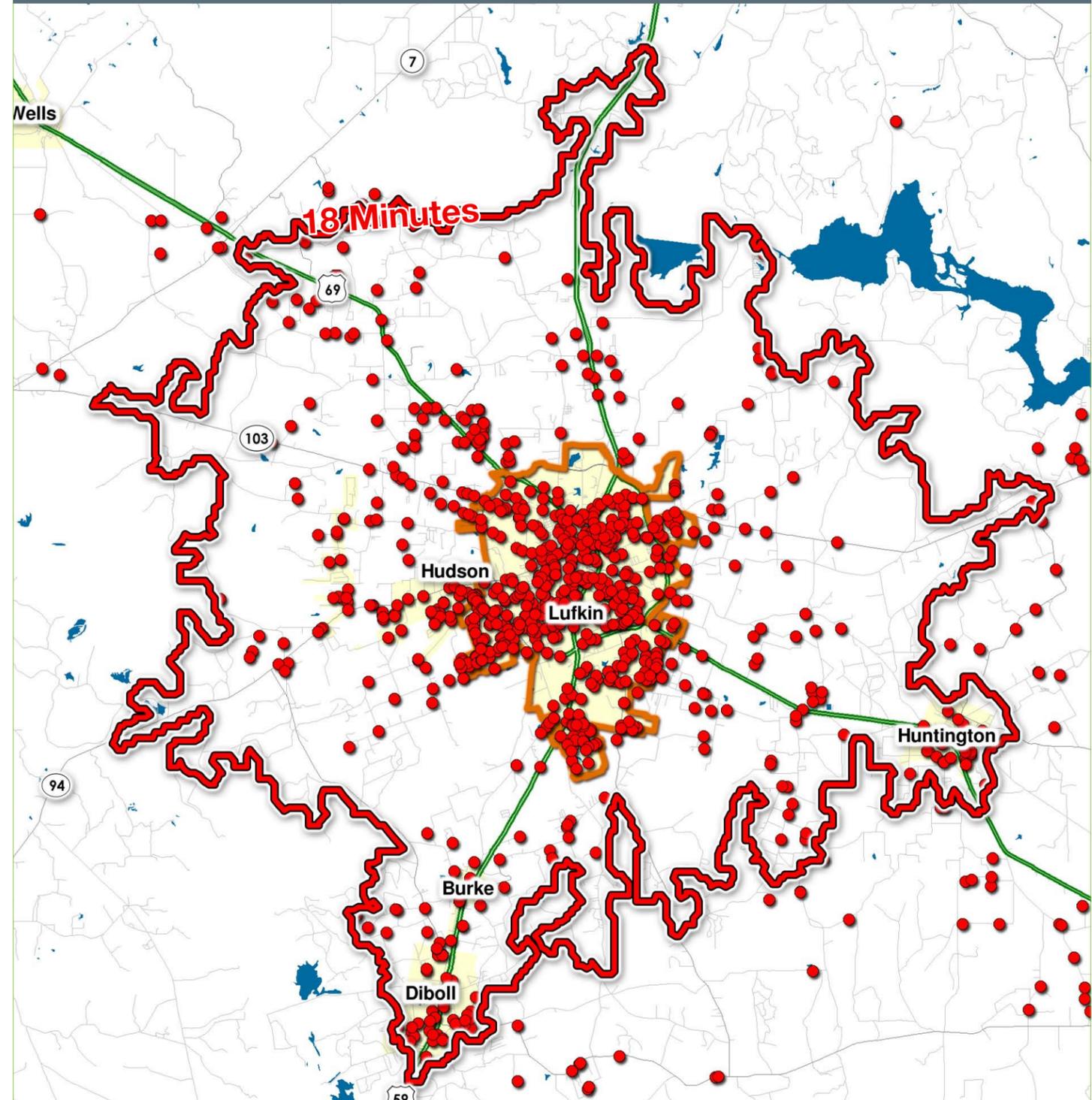


(Source: Catalyst)

**GEOGRAPHY CATCHMENT**

Drive Time (Minutes)	Catchment (%)
1 Minute Drive Time	3.0%
2 Minute Drive Time	9.1%
3 Minute Drive Time	16.4%
4 Minute Drive Time	23.7%
5 Minute Drive Time	30.7%
6 Minute Drive Time	37.6%
7 Minute Drive Time	44.5%
8 Minute Drive Time	48.0%
9 Minute Drive Time	50.9%
10 Minute Drive Time	52.0%
11 Minute Drive Time	53.6%
12 Minute Drive Time	55.3%
13 Minute Drive Time	56.5%
14 Minute Drive Time	57.4%
15 Minute Drive Time	59.2%
16 Minute Drive Time	61.1%
17 Minute Drive Time	63.6%
18 Minute Drive Time	65.3%
19 Minute Drive Time	65.9%
20 Minute Drive Time	66.5%
21 Minute Drive Time	67.3%
22 Minute Drive Time	67.5%
23 Minute Drive Time	68.5%
24 Minute Drive Time	69.3%
25 Minute Drive Time	69.4%
26 Minute Drive Time	69.8%
27 Minute Drive Time	70.1%
28 Minute Drive Time	70.5%
29 Minute Drive Time	71.0%
30 Minute Drive Time	71.6%

**DRIVE TIME MAP**



(Source: Catalyst)

**CONCENTRIC RING ANALYSIS**

Traditional concentric rings are another method used to quickly analyze trade area characteristics, but are not as accurate in identifying existing constraints of the actual Primary Trade Area (PTA) for the City of Lufkin. Retailers use concentric ring studies for quick comparisons of both existing stores and prospective new locations.

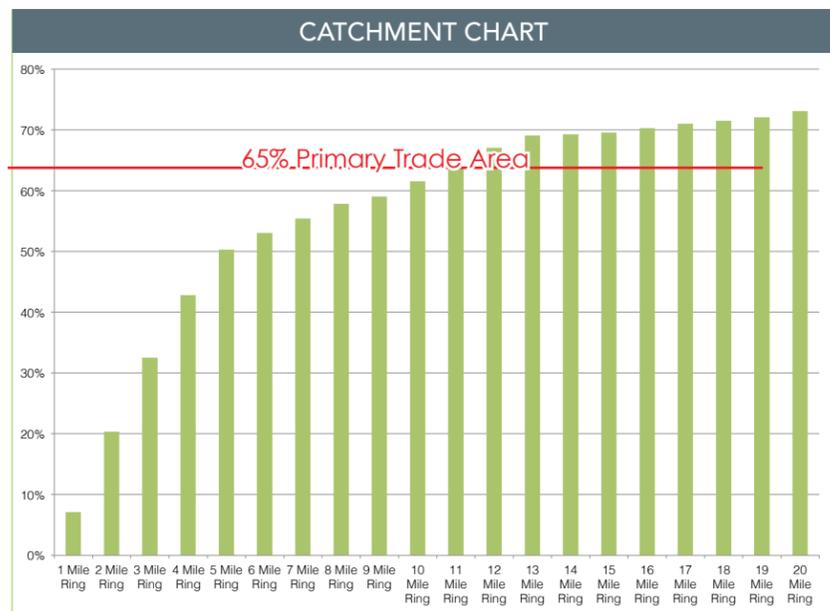
Using a concentric ring geography, an 11 mile radius from the intersection of West Frank Avenue and Angelina Street captures approximately 64.0% of the customer samples collected by Catalyst.

Although this methodology is not as accurate as customer derived delineation, it can be used for quick reference and comparison purposes. In-line retailers, as well as pade site operators, use concentric ring data more often than other methods. This report also includes trade area calculations using ring studies for Lufkin and supporting demographic data.

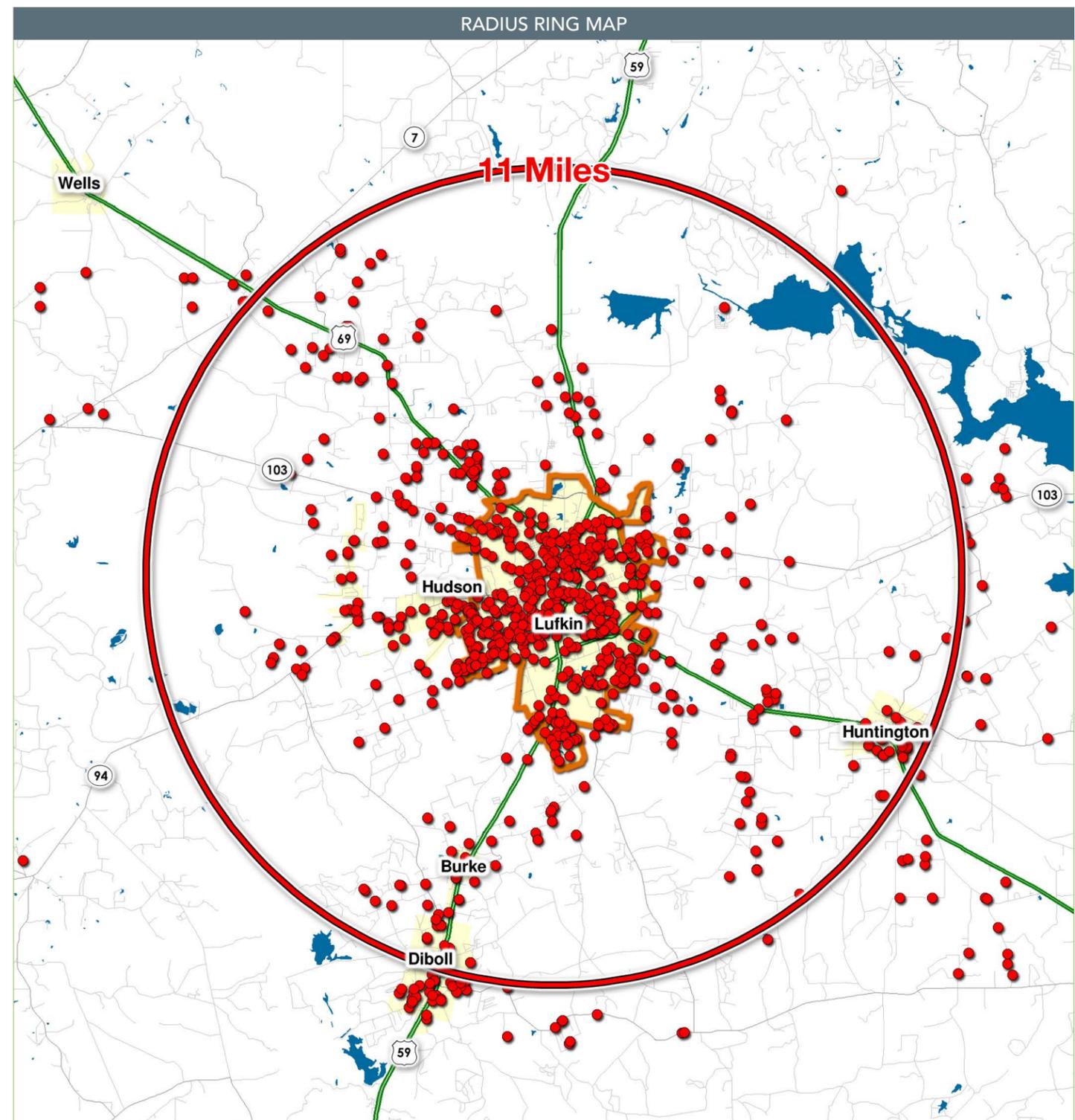
Demographic analysis of concentric ring trade areas are useful, but these assume a consistently even population distribution and do not take into account such factors such as natural boundaries, demographic shifts, manmade barriers, shopping patterns, drive time impacts and other geographic factors.

PRIMARY TRADE AREA ▶

GEOGRAPHY	CATCHMENT
1 Mile Ring	7.1%
2 Mile Ring	20.4%
3 Mile Ring	32.5%
4 Mile Ring	42.8%
5 Mile Ring	50.3%
6 Mile Ring	53.0%
7 Mile Ring	55.4%
8 Mile Ring	57.8%
9 Mile Ring	59.0%
10 Mile Ring	61.6%
11 Mile Ring	64.0%
12 Mile Ring	67.0%
13 Mile Ring	69.1%
14 Mile Ring	69.3%
15 Mile Ring	69.6%
16 Mile Ring	70.3%
17 Mile Ring	71.0%
18 Mile Ring	71.5%
19 Mile Ring	72.1%
20 Mile Ring	73.1%
21 Mile Ring	73.4%
22 Mile Ring	74.0%
23 Mile Ring	74.9%
24 Mile Ring	75.1%
25 Mile Ring	75.6%
26 Mile Ring	75.8%
27 Mile Ring	75.8%
28 Mile Ring	75.9%
29 Mile Ring	75.9%
30 Mile Ring	76.0%



(Source: Catalyst)



(Source: Catalyst)

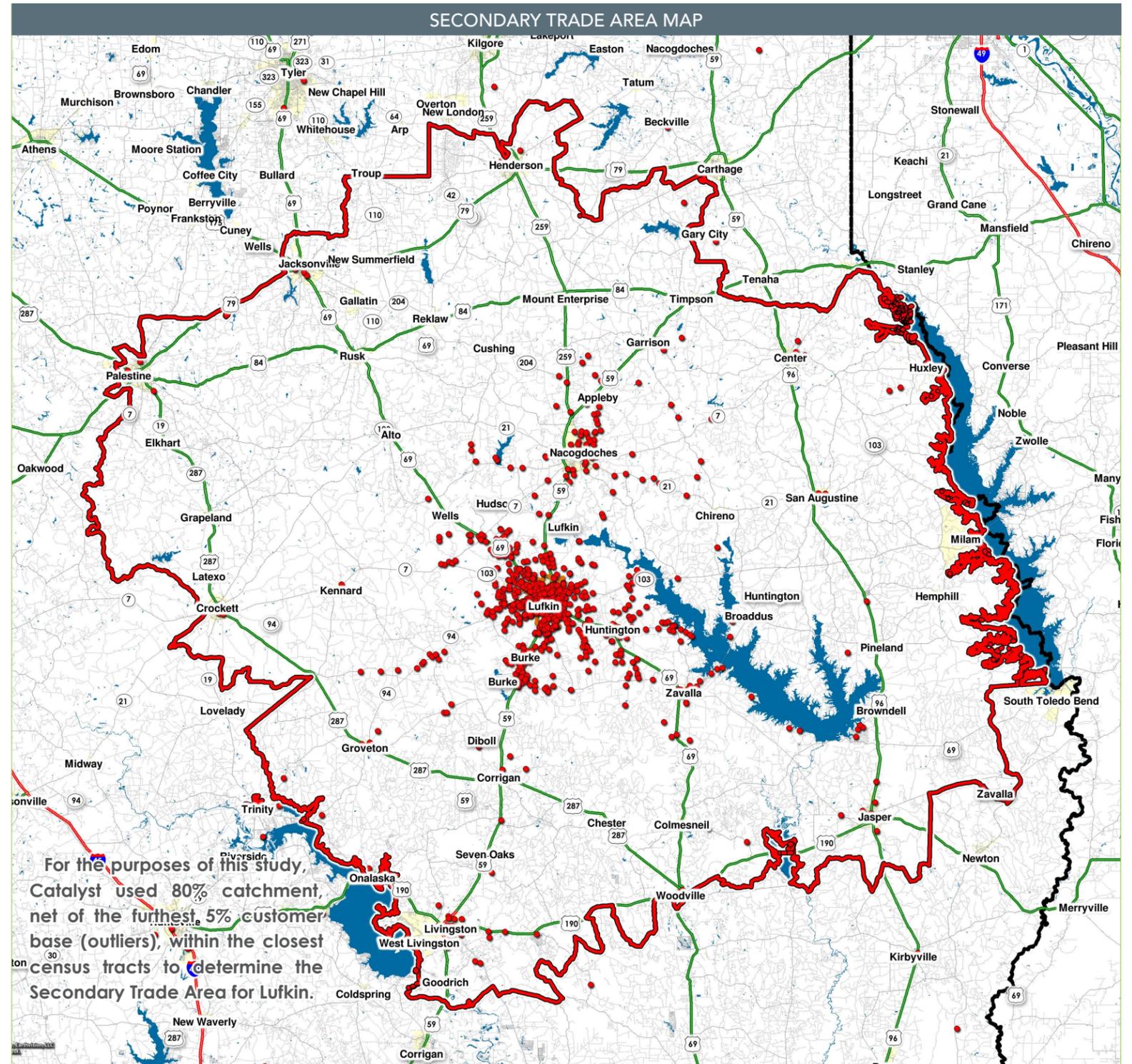
**DELINEATION OF SECONDARY TRADE AREA (CENSUS TRACTS)**

The Lufkin Secondary Trade Area includes the closest 80% of the customers. The Secondary Trade Area includes Nacogdoches, Palestine, Henderson, Crockett and Livingston. Since Lufkin is also a regional hub for retail and medical. The Secondary Trade area includes a 35 mile radii or 34 minute drive time. Customers within the STA (but outside the PTA) will not shop as frequent as customers within the PTA, but will positively influence sales within Lufkin. These customers within the STA may be people that travel to Lufkin for the regional medical and retail uses. The population of the Lufkin STA is 399,969.

**STA DEMOGRAPHIC OVERVIEW**

Population 1990	329,250
Population 2000	369,923
Population 2013	399,969
Population 2018	407,799
Households	147,565
Average Age	39.33
Median Household Income	\$40,573
Average Household Income	\$54,172
White	65.0%
Black	16.6%
Hispanic	16.0%

(Source: STI PopStats)



(Source: Catalyst)

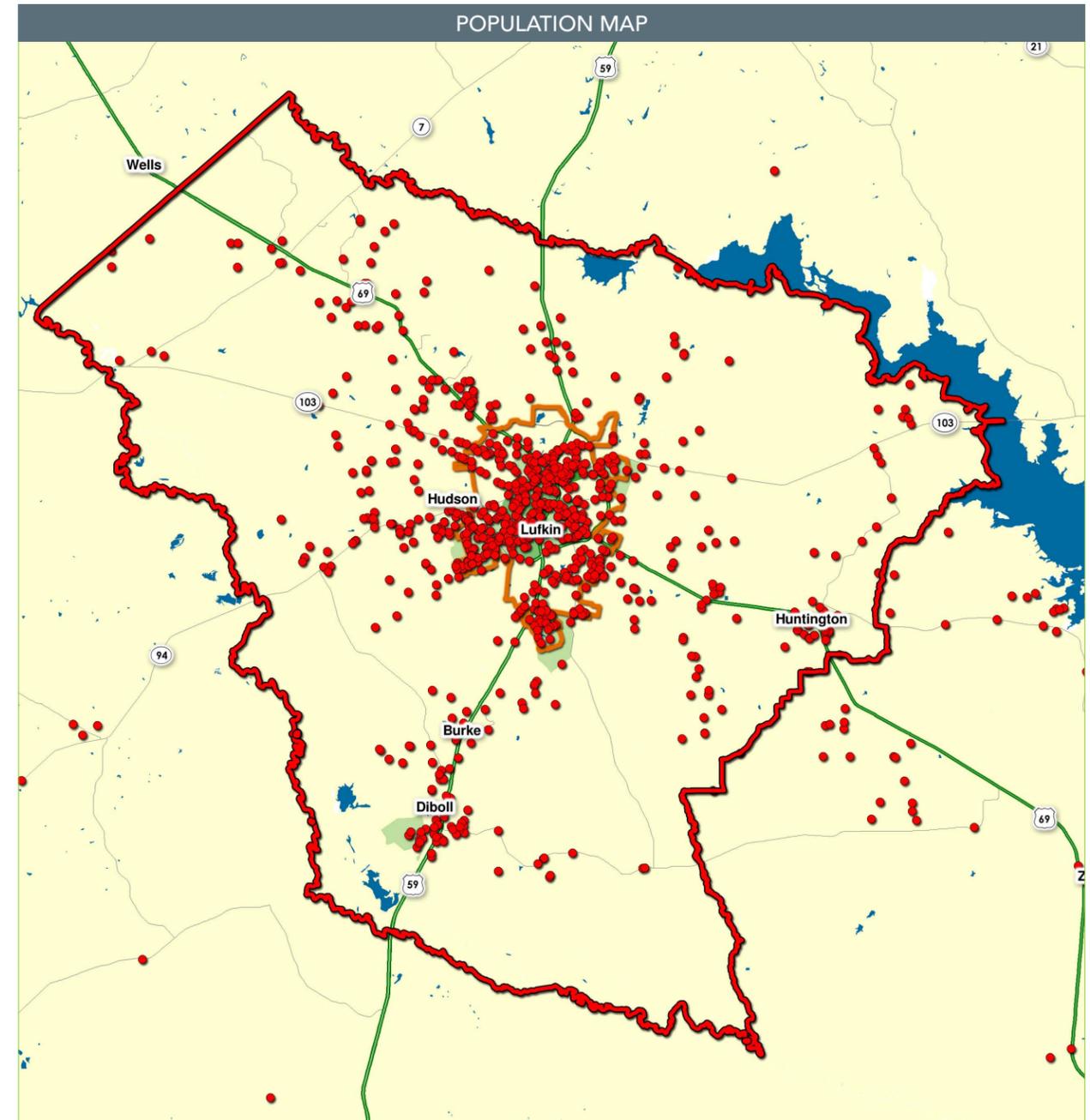
**POPULATION ANALYSIS**

The City of Lufkin, has a current population of approximately 35,390. The historical population growth rate was 7.2% (0.72% annually) between 2000 and 2010. The growth rate from 2012 to 2017 is expected to be 2.3% (0.5% annually). The estimated population for Lufkin in 2017 is 36,213. The Lufkin Primary Trade Area (PTA) population is 80,901 and is expected to grow to 83,023 by 2017, a 2.6% increase. Within 18 minutes, Lufkin has access to over 72,000 people and the PTA encompasses over 80,000 residents.

With Lufkin's high concentration of daytime employees (22,971 employees in the City of Lufkin), the city has the chance to capture employee spending. According to previous research, the average employee spends approximately \$12/day with a frequency of 4.4 times/week. Most of these dollars are spent on convenience items, restaurants, and service retail.

HISTORICAL POPULATION	LUFKIN	ANGELINA COUNTY
2000	32,709	80,130
2010	35,067	86,771
2012	35,390	87,588
2017	36,213	89,777

(Source: US Census, ESRI)



(Source: Catalyst)

POPULATION TABLE	CITY	PTA	1 MILE	3 MILES	5 MILES	11 MILES	18 MINUTES
2012 Population	35,390	80,901	8,065	31,815	49,233	74,559	72,002
Projected 2017 Population	36,213	83,023	8,078	32,473	50,570	76,583	73,831

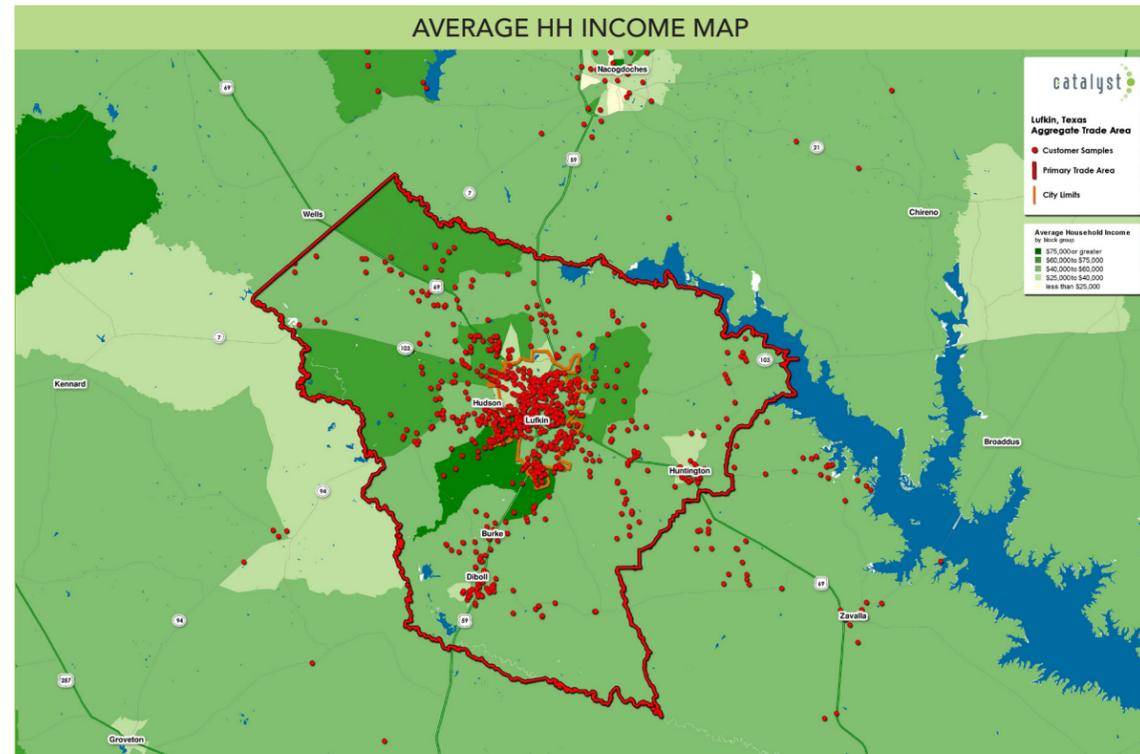
(Source: ESRI)

**INCOME ANALYSIS**

As seen in the maps below, the Lufkin Primary Trade Area (PTA) holds a strong level of block groups with higher median and average incomes. The forecasted median income in 2017 for the City of Lufkin is \$43,036, an 18.4% increase (3.7% annually). The forecasted average income in 2017 for the City of Lufkin is \$60,836, an 11.0% increase (2.2% annually). The per capita income for the City of Lufkin is also increasing at similar rates. The 2012 per capita income for the City of Lufkin is \$20,604 and is expected to grow 11.0% (2.2% annually) to \$22,874 by 2017.

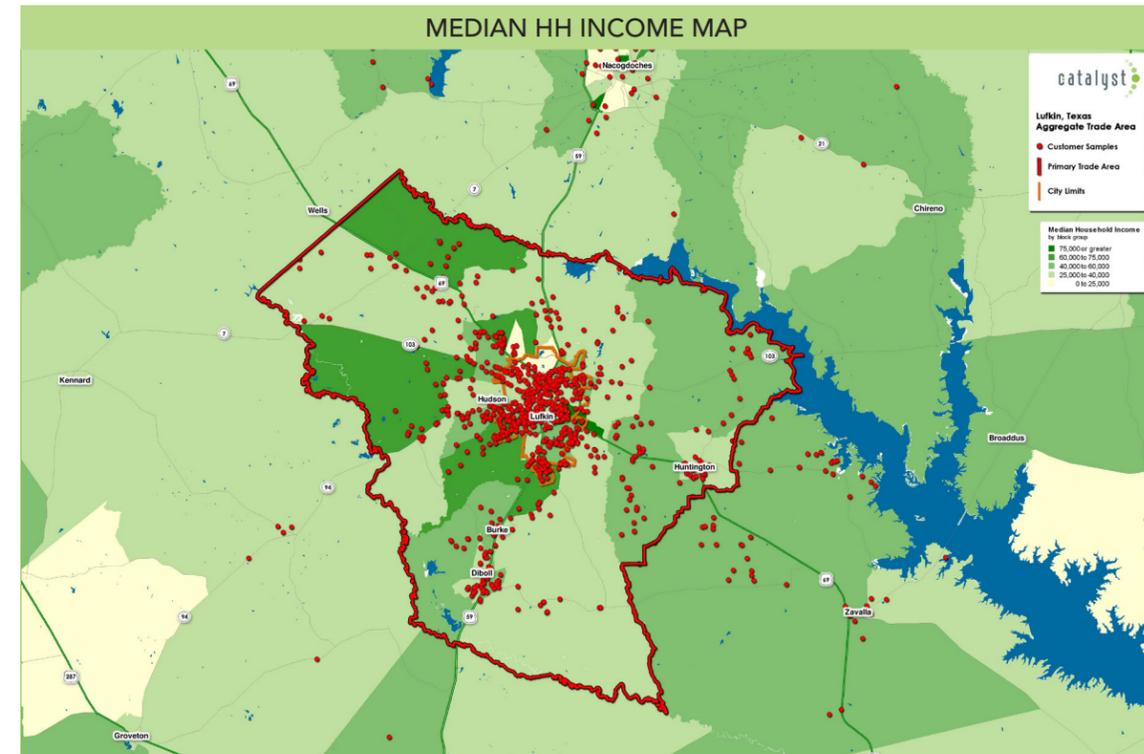
Retail merchandising strategies should take into consideration not only the density of

demand drivers such as residential and workforce populations, but also take into context the profile of those demand drivers. Income levels are often indicative consumer purchasing preferences. Given there is some variation between the median incomes of the study areas the City of Lufkin should consider whether the existing retail appropriate serves the lower demographic and if so the focused purpose of the retail merchandising strategies.



(Source: Catalyst)

The City of Lufkin has an average income of \$54,792 which is 64% higher than the median income of Angelina County (\$33,423)



(Source: Catalyst)

The City of Lufkin has a median income of \$36,377, which is 7% lower than the median income of Angelina County (\$39,169)

INCOME TABLE	CITY	PTA	1 MILE	3 MILES	5 MILES	11 MILES	18 MINUTES
Average Household Income	\$54,792	\$52,094	\$41,791	\$49,046	\$53,405	\$52,762	\$52,619
Median Household Income	\$36,337	\$37,212	\$28,491	\$34,155	\$36,592	\$37,535	\$37,330

(Source: ESRI)

**RACE AND ETHNICITY PROFILE**

The City of Lufkin population grew 7.2% between 2000 and 2010. With this growth comes change in the racial and ethnic make up of a city. From 2012 to 2017, the following changes are forecasted to occur:

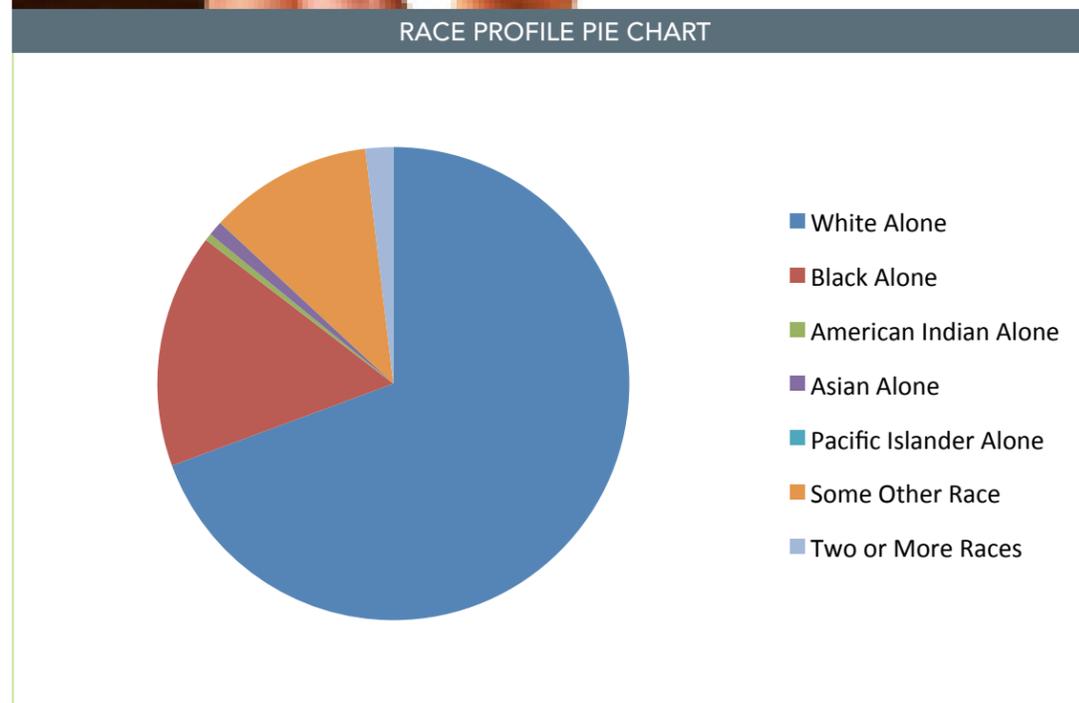
1. White Alone category will decrease from 56.9% to 55.7% of the population
2. Black Alone category will decrease from 25.8% to 25.0% of the population
3. Hispanic Origin category will increase from 26.2% to 29.6% of the population.

Retail merchandising plans should not just take into consideration the density of demand drivers, but also the need for retail to represent ethnic changes. While the change is moderate it is a factor that should be considered going forward.

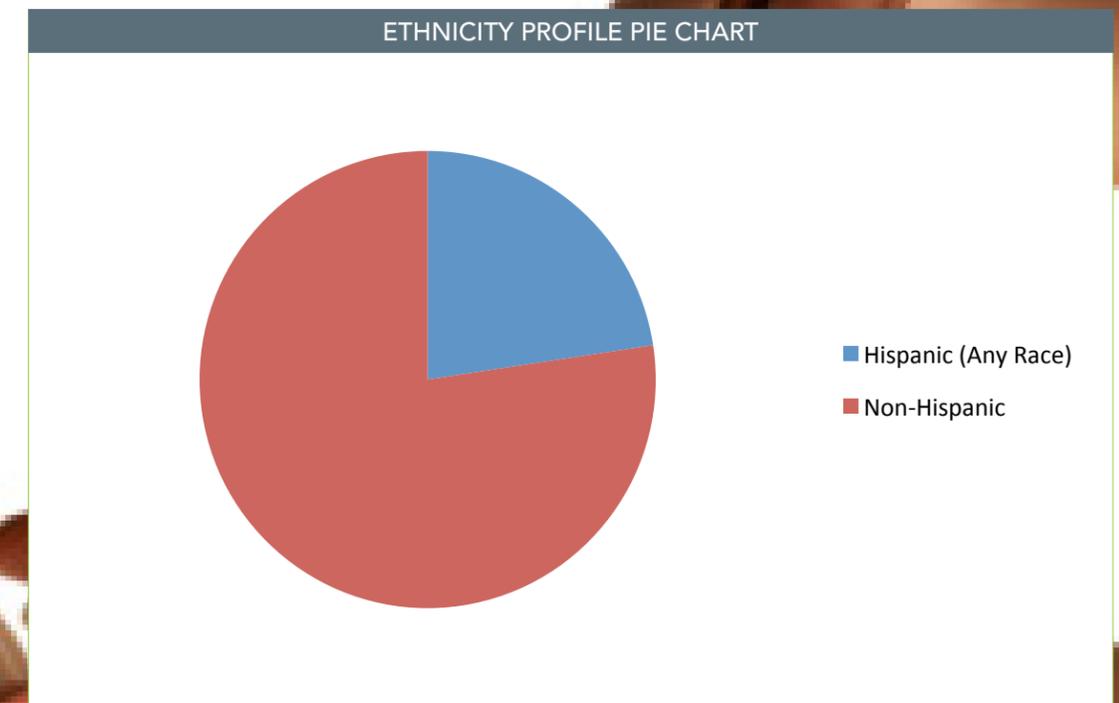
RACE TABLE	CITY	PTA	1 MILE	3 MILES	5 MILES	11 MILES	18 MINUTES
White Alone	56.9%	69.3%	42.6%	53.4%	61.7%	69.6%	68.5%
Black Alone	25.8%	16.0%	33.6%	27.9%	21.9%	16.1%	16.6%
American Indian Alone	0.5%	0.5%	0.6%	0.5%	0.6%	0.5%	0.5%
Asian Alone	1.6%	1.0%	0.8%	1.1%	1.4%	1.1%	1.1%
Pacific Islander Alone	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Some Other Race	12.9%	11.2%	19.8%	14.8%	12.3%	10.8%	11.2%
Two or More Races	2.3%	1.9%	2.6%	2.2%	2.2%	1.9%	2.0%

ETHNICITY TABLE	CITY	PTA	1 MILE	3 MILES	5 MILES	11 MILES	18 MINUTES
Hispanic (Any Race)	26.2%	22.6%	42.5%	29.4%	24.5%	21.6%	22.7%
Non-Hispanic	73.8%	77.4%	57.5%	70.6%	75.5%	78.4%	77.3%

(Source: ESRI)



(Source: Catalyst)



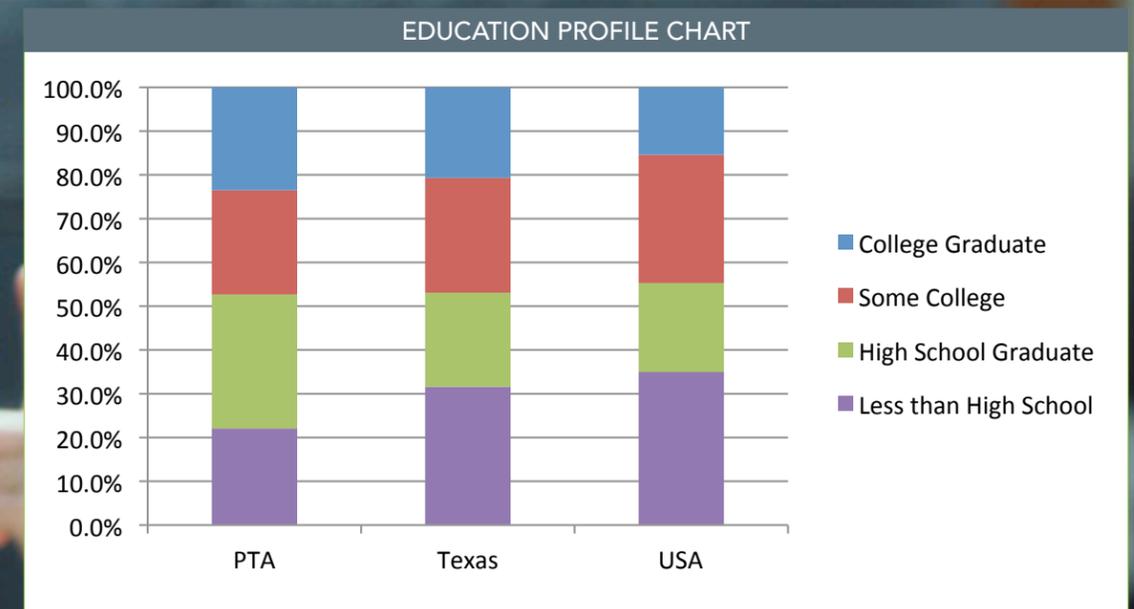
(Source: Catalyst)

**EDUCATION PROFILE**

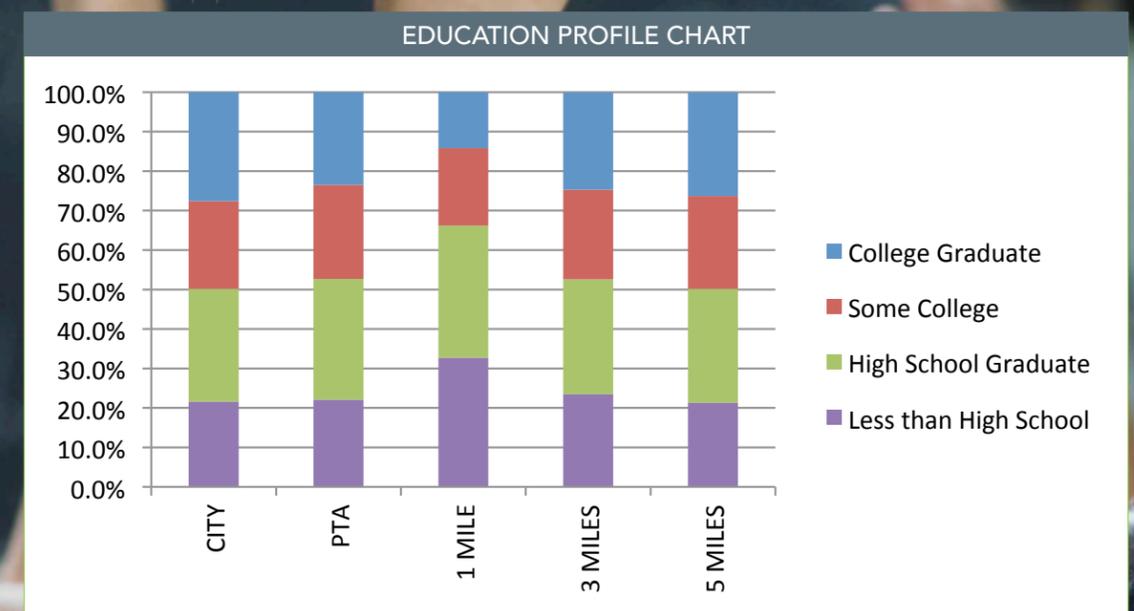
Educational attainment is reported for persons age 25 and older, as this is the traditional age by which most people have completed their formal education. However, a trend has developed in recent years for persons to return for schooling past age 25. Still, these figures provide a picture of the general educational level of the population. Educational attainment is usually associated with income. Education levels can also have a measurable impact on what types of products consumers buy and is a variable often included in retailer analyses.

The City of Lufkin has a higher college graduate rate (27.6%) than the Lufkin Primary Trade Area (23.5%), Texas (20.7%), and the United States (15.4%). 78.4% of Lufkin residents graduated high school, a higher high school graduate rate than the Lufkin Primary Trade Area (77.9%).

The City of Lufkin does have a notable advantage in retaining its population who complete high school. One observation from our analysis is the number of opportunities for employment where some or any college may not be needed. Several employers are able to provide training and development where some college or a degree may not be required.



(Source: Catalyst)



(Source: Catalyst)

EDUCATION TABLE	CITY	PTA	1 MILE	3 MILES	5 MILES	11 MILES	18 MINUTES
College Graduate	27.6%	23.5%	14.2%	24.6%	26.2%	24.3%	24.2%
Some College	22.2%	23.8%	19.6%	22.7%	23.5%	24.4%	24.1%
High School Graduate	28.6%	30.6%	33.5%	29.1%	28.9%	30.1%	30.4%
Less than High School	21.6%	22.1%	32.7%	23.5%	21.3%	21.2%	21.3%

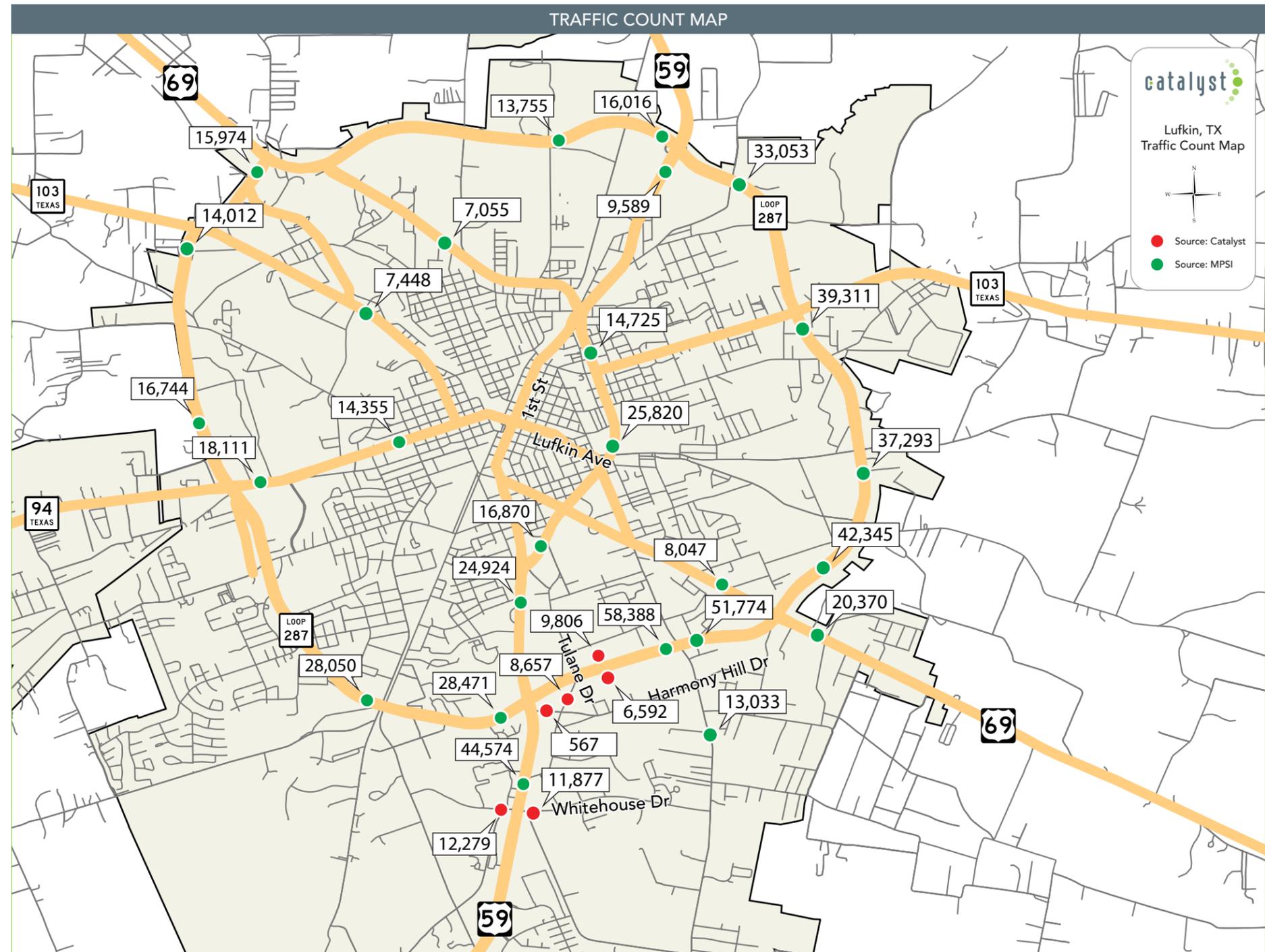
(Source: ESRI)

**TRAFFIC COUNTS**

Average daily traffic volume is an important measurement by which retailers evaluate potential sites. Generally speaking, higher traffic counts are more attractive to retailers as they are typically translated into greater retail sales potential. The map to the right shows traffic counts from Catalyst (red) and MPSI (green). The table below shows traffic counts from Catalyst.

Traffic counts on Loop 287 drive the flow of vehicles across Lufkin. On the northern edge of Lufkin off Loop 287 and US Highway 59 we see numbers of 33,000 from the East, however, from the West we see numbers of 16,000. The traffic count from the East is higher because it is capturing the traffic to the most prominent retail node in the southernmost part of the city. On the southern edge of Lufkin off Loop 287 and US Highway 59 we see numbers of 58,000 from the east and 28,000 from the west. The next highest traffic count that is not on Loop 287 is 44,000 and found south of the Loop on US Highway 59. This corridor captures the most active retail in the city of Lufkin.

From the downtown core intersection of US Highway 59 and Lufkin Avenue, the traffic counts were higher south of Lufkin Avenue (16,870) than north of Lufkin Avenue (14,725). Heading south on Timberland Drive (US Highway 59) as it merges with South 1st we see the number jump to nearly 25,000 vehicles. Heading north from the downtown core on Timberland drive as the road diverges with Kurth Avenue we see nearly an equal split of the traffic counts.



(Source: Catalyst)

TRAFFIC COUNTS TABLE			
ROADWAY	CROSS STREET	COUNT	SOURCE
Whitehouse Dr	w of US Highway 59	12,279	Catalyst 2013
Whitehouse Dr	e of US Highway 59	11,877	Catalyst 2013
Harmony Hill Dr	w of Tulane Dr	567	Catalyst 2013
Tulane Dr	s of US Highway 59	8,657	Catalyst 2013
US Highway 59 Frontage Road (EB)	e of Tulane Dr	9,806	Catalyst 2013
US Highway 59 Frontage Road (WB)	e of Tulane Dr	6,592	Catalyst 2013

**MARKET POTENTIAL ANALYSIS BY CATEGORY**

The following data is based upon Sales Potential and Consumer Spending Data within the Primary Trade Area (PTA). Consumer spending data is derived from the Bureau of Labor Statistics with ESRI forecasts for 2010 and 2015 projections. Supply estimates are sales to consumers by establishment, and exclude business to business sales. Demand estimates reflect the expected amount spent by consumers at retail outlets. A positive value (+) represents "leakage" and negative values (-) reflect "over supply". Data for this section is provided by ESRI, MediaMark and InfoUSA.

**Note that the following categories are considered undersupplied or oversupplied when aggregating sales and demand across the Lufkin PTA.**

The most undersupplied categories include:

1. Health & Personal Care (NAICS 4461): \$8,454,201

Currently, most of the Health & Personal Care shops in the City of Lufkin are located in the strong retail node in the southern part of the city. Merle Norman Cosmetic Studio and Bodies N Balance Therapeutic provide supply to the central portion of the city. In this category there are \$36,396,456 in sales and \$44,850,656 in demand.

2. Beer, Wine & Liquor Stores (NAICS 4453): \$3,696,315

Currently there is a large demand (\$4,151,799) and a small supply (\$455,484) and this may be due to the fact that HEB and the three Brookshire Brothers all sell Beer and Wine (the sales from beer and wine for HEB and Brookshire Brothers would be included in following category - Grocery Stores NAICS 4451).

3. Grocery Stores (NAICS 4451): \$3,348,334

The current grocery supply in the City of Lufkin (exclusively) consists mostly of sales from HEB, Brookshire Brothers (3), and La Michoacana. Also included in this category are convenience stores. Currently, there is a supply of \$92,210,115 and demand of \$95,558,450 in the Lufkin PTA.

4. Book, Periodical & Music Stores (NAICS 4512): \$3,053,042

The Lufkin PTA has a demand of \$3,418,384 and sales of only \$365,342. Currently the City of Lufkin only has a few bookstores, including Buy the Book.

5. Drinking Places – Alcoholic Beverages (NAICS 7224): \$2,927,759

Currently, there is modest supply (\$983,342) within the Lufkin PTA and a significantly larger demand (\$3,911,102).

INDUSTRY GROUP	DEMAND (RETAIL POTENTIAL)	SUPPLY (RETAIL SALES)	RETAIL GAP	SURPLUS / LEAKAGE FACTOR
Total Retail Trade and Food & Drink (NAICS 44-45, 722)	\$636,943,045	\$1,014,551,676	-\$377,608,631	-22.9
Total Retail Trade (NAICS 44-45)	\$576,283,397	\$912,013,184	-\$335,729,786	-22.6
Total Food & Drink (NAICS 722)	\$60,659,647	\$102,538,492	-\$41,878,845	-25.7
INDUSTRY GROUP	DEMAND (RETAIL POTENTIAL)	SUPPLY (RETAIL SALES)	RETAIL GAP	SURPLUS / LEAKAGE FACTOR
Automobile Dealers (NAICS 4411)	\$97,148,342	\$249,982,884	-\$152,834,542	-44.0
Other Motor Vehicle Dealers (NAICS 4412)	\$5,981,853	\$13,967,639	-\$7,985,786	-40.0
Auto Parts, Accessories, and Tire Stores (NAICS 4413)	\$9,013,047	\$9,724,271	-\$711,225	-3.8
Furniture Stores (NAICS 4421)	\$7,701,226	\$10,663,421	-\$2,962,195	-16.1
Home Furnishings Stores (NAICS 4422)	\$5,088,901	\$2,965,228	\$2,123,673	26.4
Electronics & Appliance Stores (NAICS 443/NAICS 4431)	\$16,261,532	\$45,648,317	-\$29,386,784	-47.5
Building Material and Supplies Dealers (NAICS 4441)	\$16,456,548	\$39,939,655	-\$23,483,107	-41.6
Lawn and Garden Equipment and Supplies Stores (NAICS 4442)	\$2,407,648	\$5,905,784	-\$3,498,136	-42.1
Grocery Stores (NAICS 4451)	\$95,558,450	\$92,210,115	\$3,348,334	1.8
Specialty Food Stores (NAICS 4452)	\$2,879,441	\$2,781,573	\$97,868	1.7
Beer, Wine, and Liquor Stores (NAICS 4453)	\$4,151,799	\$455,484	\$3,696,315	80.2
Health & Personal Care Stores (NAICS 446/NAICS 4461)	\$44,850,656	\$36,396,456	\$8,454,201	10.4
Gasoline Stations (NAICS 447/NAICS 4471)	\$69,604,881	\$87,386,592	-\$17,781,710	-11.3
Clothing Stores (NAICS 4481)	\$24,331,999	\$50,004,399	-\$25,672,400	-34.5
Shoe Stores (NAICS 4482)	\$4,163,027	\$9,271,280	-\$5,108,253	-38.0
Jewelry, Luggage, and Leather Goods Stores (NAICS 4483)	\$4,826,597	\$3,522,987	\$1,303,610	15.6
Sporting Goods/Hobby/Musical Instrument Stores (NAICS 4511)	\$10,872,924	\$11,400,335	-\$527,410	-2.4

INDUSTRY GROUP	DEMAND (RETAIL POTENTIAL)	SUPPLY (RETAIL SALES)	RETAIL GAP	SURPLUS / LEAKAGE FACTOR
Book, Periodical, and Music Stores (NAICS 4512)	\$3,418,384	\$365,342	\$3,053,042	80.7
Department Stores Excluding Leased Depts. (NAICS 4521)	\$36,158,168	\$64,849,754	-\$28,691,585	-28.4
Other General Merchandise Stores (NAICS 4529)	\$65,843,602	\$137,513,275	-\$71,669,673	-35.2
Florists (NAICS 4531)	\$692,037	\$534,042	\$157,995	12.9
Office Supplies, Stationery, and Gift Stores (NAICS 4532)	\$3,605,913	\$5,593,817	-\$1,987,904	-21.6
Used Merchandise Stores (NAICS 4533)	\$2,983,151	\$1,674,535	\$1,308,616	28.1
Other Miscellaneous Store Retailers (NAICS 4539)	\$8,709,805	\$14,119,303	-\$5,409,497	-23.7
Full-Service Restaurants (NAICS 7221)	\$23,770,505	\$62,819,823	-\$39,049,318	-45.1
Limited-Service Eating Places (NAICS 7222)	\$31,311,413	\$29,947,972	\$1,363,442	2.2
Special Food Services (NAICS 7223)	\$1,666,628	\$8,787,355	-\$7,120,728	-68.1
Drinking Places - Alcoholic Beverages (NAICS 7224)	\$3,911,102	\$983,342	\$2,927,759	59.8

(Source: ESRI)

Below are the most oversupplied categories in the Lufkin PTA. These categories are likely oversupplied because Lufkin is a regional hub and is pulling customers from beyond the PTA for the following categories. This results in a gross oversupply when the sales far exceed the demand (summation of the dollar amount that the residents of the PTA are estimated to spend in each category).

The most oversupplied categories include:

1. Automobile Dealers (NAICS 4411): -\$152,834,542

Within the Lufkin PTA, there is a supply of \$249,982,884 and a demand of \$97,148,342.

2. Other General Merchandise Stores (NAICS 4451): -\$71,669,673

This category includes Walmart and Sam's Club. These are the only locations within Angelina County and most likely make up a large portion of the supply in this category (\$137,513,275). The current demand for the Lufkin PTA for this category is \$65,843,602.

3. Full-Service Restaurants (NAICS 7221): -\$39,049,318

Currently, there is a demand of \$23,770,505 and a supply of \$62,819,823 in the Lufkin PTA. A large portion of the Full Service Restaurants in the City of Lufkin are located at Loop 287 and US Highway 59.

4. Department Stores Excluding Leased Depts. (NAICS 4521): -\$28,691,585

Currently, there is a demand of \$36,158,168 and a supply of \$64,849,754 in the Lufkin PTA.

5. Clothing Stores (NAICS 4481): -\$25,672,400

This category has a demand of \$24,331,999 and a supply of over double that at \$50,004,399.

**DEMAND BY RANGE**

The following tables show demand broken down by bands. Each band is mutually exclusive. For instance the 3 - 5 mile band only is taking into account demand and supply within that band and does not include the demand and supply within the 0 - 3 mile band. Using this method, there is a demand for 490,387 square feet of additional retail in Lufkin. The table

starting below (Demand Summary) is a summation of the four tables on pages 22 through 24. The map on page 21 gives a reference of the size of each of the ranges (0 - 3 miles, 3 - 5 miles, 5 - 10 miles, and 10 - 20 miles). The pages following the map is the breakdown of how each range's demand was calculated.

DEMAND SUMMARY	0 - 3 MILES	3 - 5 MILES	5 - 10 MILES	10 - 20 MILES	TOTAL (SF)
Automobile Dealers	-	-	54,783	-	54,783

The Automobile Dealers industry has been hurt by recent declines in disposable income and due to the dip in new car sales, dealers have been turning to the parts and service departments to recoup

lost revenue. From 2008 to 2013, the annual revenue growth in this industry was -1.9%.

DEMAND SUMMARY	0 - 3 MILES	3 - 5 MILES	5 - 10 MILES	10 - 20 MILES	TOTAL (SF)
Other Motor Vehicle Dealers	-	31	1,657	-	1,689

The Other Motor Vehicle Dealers industry includes dealers for recreational vehicles, motorcycles, bicycles, and boats. This industry was hurt by recent declines in disposable incomes, but it prepared for

industry recovery with an increasing number of the biggest buyers, baby boomers. From 2008 to 2013, the annual revenue growth for this industry was -1.4%.

DEMAND SUMMARY	0 - 3 MILES	3 - 5 MILES	5 - 10 MILES	10 - 20 MILES	TOTAL (SF)
Auto Parts, Accessories & Tire Stores	-	4,047	2,352	-	6,399

The Auto Parts, Accessories & Tire Stores industry is doing well following the recession due to consumers keeping their vehicles and turning to auto parts stores for replacement parts, rather than purchasing

new vehicles. From 2008 to 2013, the annual revenue growth for this industry was 1.0%.

DEMAND SUMMARY	0 - 3 MILES	3 - 5 MILES	5 - 10 MILES	10 - 20 MILES	TOTAL (SF)
Furniture Stores	-	1,638	2,747	-	4,384

The Furniture Store industry has been hurt recently by declines in disposable income, homeownership rates, and increases in competition. From 2008 to 2013, the annual revenue growth for this

industry was 0.0%. From 2013 to 2018, the annual revenue growth for this industry is expected to be 2.1%.

DEMAND SUMMARY	0 - 3 MILES	3 - 5 MILES	5 - 10 MILES	10 - 20 MILES	TOTAL (SF)
Home Furnishings Stores	-	1,998	2,942	1,581	6,521

The Home Furnishings industry has been hurt recently by declines in disposable income, but is on an upward trend due to consumers seeking higher end furnishings that mass merchandise retailers

cannot cater to. From 2008 to 2013, the annual revenue growth for this industry was 1.0%.

(Source: Catalyst, ESRI, IBISWorld)

DEMAND SUMMARY	0 - 3 MILES	3 - 5 MILES	5 - 10 MILES	10 - 20 MILES	TOTAL (SF)
Electronics & Appliance Stores	-	-	11,023	-	11,023

The Electronics & Appliance stores industry has been hurt recently by declines in disposable income and online purchases. From 2008 to 2013, the annual revenue growth for this industry was -4.6%. 96%

of the industry's revenue is reported by Best Buy, Apple, Fry's, and RadioShack.

DEMAND SUMMARY	0 - 3 MILES	3 - 5 MILES	5 - 10 MILES	10 - 20 MILES	TOTAL (SF)
Lawn & Garden Equip & Supply Stores	-	-	749	-	749

The Lawn & Garden Equipment & Supply Stores industry is expected to continue the trend of declining revenue over the next five years as consumers look towards home improvement stores as a one stop

shop. From 2008 to 2013, the annual revenue growth for this industry was -2.0%.

DEMAND SUMMARY	0 - 3 MILES	3 - 5 MILES	5 - 10 MILES	10 - 20 MILES	TOTAL (SF)
Grocery Stores	-	33,374	21,776	3,196	58,346

The Grocery industry will slowly be growing and recovering from the recent economic downturn as consumers with more disposable income will increase purchases of name brand items. From 2008 to

2013, the annual revenue growth for this industry was -0.4%.

DEMAND SUMMARY	0 - 3 MILES	3 - 5 MILES	5 - 10 MILES	10 - 20 MILES	TOTAL (SF)
Specialty Food Stores	927	2,009	-	-	2,936

The Specialty Food Stores industry is expected to grow as disposable incomes of consumers grow, but larger grocery stores that function as a one stop shop will continue to impede growth. From 2008 to

2013, the annual revenue growth for this industry was 0.1%.

DEMAND SUMMARY	0 - 3 MILES	3 - 5 MILES	5 - 10 MILES	10 - 20 MILES	TOTAL (SF)
Beer, Wine & Liquor Stores	5,167	3,363	-	1,268	9,798

The Beer, Wine & Liquor Stores industry got a boost during the recent decline in disposable incomes, due to more consumers consuming alcoholic beverages at home to save money, rather than purchasing

alcohol at restaurants and bars. From 2008 to 2013, the annual revenue growth for this industry was 0.8%.

DEMAND SUMMARY	0 - 3 MILES	3 - 5 MILES	5 - 10 MILES	10 - 20 MILES	TOTAL (SF)
Health & Personal Care Stores	-	30,189	31,907	7,695	69,791

The Health & Personal Care Stores industry is expected to grow with the aging population, product innovation, and increased sales of name brand items as disposable incomes increase. From 2008 to

2013, the annual revenue growth for this industry was 1.3%.

(Source: Catalyst, ESRI, IBISWorld)

DEMAND SUMMARY	0 - 3 MILES	3 - 5 MILES	5 - 10 MILES	10 - 20 MILES	TOTAL (SF)
Gasoline Stations	-	-	29,458	-	29,458

The Gasoline Station industry is expected to continue to grow as consumers with more disposable incomes are driving more. From 2008 to 2013, the annual revenue growth for this industry was 0.8%.

DEMAND SUMMARY	0 - 3 MILES	3 - 5 MILES	5 - 10 MILES	10 - 20 MILES	TOTAL (SF)
Clothing Stores	-	4,973	16,824	-	21,797

As with many soft goods, as disposable incomes increase, so will spending in the Clothing Store category. From 2008 to 2013, the annual revenue growth for this industry was 0.4%.

DEMAND SUMMARY	0 - 3 MILES	3 - 5 MILES	5 - 10 MILES	10 - 20 MILES	TOTAL (SF)
Shoe Stores	-	1,281	5,728	-	7,009

As with many soft goods, as disposable incomes increase, so will spending in the Shoe Stores category. From 2008 to 2013, the annual revenue growth for this industry was 1.8%.

DEMAND SUMMARY	0 - 3 MILES	3 - 5 MILES	5 - 10 MILES	10 - 20 MILES	TOTAL (SF)
Jewelry, Luggage & Leather Goods Stores	-	1,902	2,918	1,007	5,828

Demand for luxury accessories is expected to increase spending in the Jewelry, Luggage, and Leather Goods categories. From 2008 to 2013, the annual revenue growth for this industry was 0.5%.

DEMAND SUMMARY	0 - 3 MILES	3 - 5 MILES	5 - 10 MILES	10 - 20 MILES	TOTAL (SF)
Sporting Goods/Hobby/Musical Instr Stores	-	2,973	6,007	7	8,986

Small, independent retailers in these industries are finding it hard to compete with better merchandised, super-stores. The retailers in the super-store category will continue to do well. From 2008 to 2013, the annual revenue growth for this industry was -0.8%.

DEMAND SUMMARY	0 - 3 MILES	3 - 5 MILES	5 - 10 MILES	10 - 20 MILES	TOTAL (SF)
Book, Periodical & Music Stores	3,647	2,264	2,189	2,171	10,271

As technology increases its presence in our modern lives, this industry will continue to decline in growth. From 2008 to 2013, the annual revenue growth for this industry was -2.8%.

(Source: Catalyst, ESRI, IBISWorld)

DEMAND SUMMARY	0 - 3 MILES	3 - 5 MILES	5 - 10 MILES	10 - 20 MILES	TOTAL (SF)
Department Stores Excluding Leased Depts.	-	13,239	18,368	-	31,607

As disposable incomes increase, so will spending on soft goods and luxury items. This category isn't in the clear though, as online retailers will give the brick and mortar retailers stiff competition. From 2008 to

2013, the annual revenue growth for this industry was -1.2%.

DEMAND SUMMARY	0 - 3 MILES	3 - 5 MILES	5 - 10 MILES	10 - 20 MILES	TOTAL (SF)
Other General Merchandise Stores	-	-	69,527	-	69,527

Growth in this category will continue to grow as consumers watch their dollar and spend more at one stop shops, rather than specialty retailers. This category capitalized on the recession by offering goods

at a discount. From 2008 to 2013, the annual revenue growth for this industry was 4.7%.

DEMAND SUMMARY	0 - 3 MILES	3 - 5 MILES	5 - 10 MILES	10 - 20 MILES	TOTAL (SF)
Florists	-	265	154	137	556

Florist shops are hurting from the increase of consumers purchasing flowers and arrangements at grocery stores and general merchandise stores. These one stop shops generally offer a similar product at a

discount. From 2008 to 2013, the annual revenue growth for this industry was -0.4%.

DEMAND SUMMARY	0 - 3 MILES	3 - 5 MILES	5 - 10 MILES	10 - 20 MILES	TOTAL (SF)
Office Supplies, Stationery & Gift Stores	-	2,092	2,006	-	4,098

Increased spending by businesses, due to a recovering economy, is a probable cause for the growth in the Office Supply category. Similar to office supplies, Stationery and Gift stores will From 2008 to

2013, the annual revenue growth for this industry was -0.4%.

DEMAND SUMMARY	0 - 3 MILES	3 - 5 MILES	5 - 10 MILES	10 - 20 MILES	TOTAL (SF)
Used Merchandise Stores	-	2,555	2,001	1,970	6,527

The demand for used goods was up during the recession but is expected to decline as disposable incomes increase. From 2008 to 2013, the annual revenue growth for this industry was 5.1%.

DEMAND SUMMARY	0 - 3 MILES	3 - 5 MILES	5 - 10 MILES	10 - 20 MILES	TOTAL (SF)
Other Miscellaneous Store Retailers	-	-	1,645	-	1,645

This category includes Pet Stores, Art Dealers, Manufactured Home Dealers, and Small Specialty Retail Stores. From 2008 to 2013, the annual revenue growth for this industry was 1.3%.

(Source: Catalyst, ESRI, IBISWorld)

DEMAND SUMMARY	0 - 3 MILES	3 - 5 MILES	5 - 10 MILES	10 - 20 MILES	TOTAL (SF)
Full-Service Restaurants	-	-	14,491	-	14,491

The Full Service Restaurants industry will continue to grow as customer spending increases after the recent economic dip. From 2008 to 2013, the annual revenue growth for this industry was 1.9%.

DEMAND SUMMARY	0 - 3 MILES	3 - 5 MILES	5 - 10 MILES	10 - 20 MILES	TOTAL (SF)
Limited-Service Eating Places	-	15,161	19,508	1,551	36,220

Despite the recent recession, the Limited-Service Eating Places industry will continue to grow by offering value oriented menu items. From 2008 to 2013, the annual revenue growth for this industry was 1.0%.

DEMAND SUMMARY	0 - 3 MILES	3 - 5 MILES	5 - 10 MILES	10 - 20 MILES	TOTAL (SF)
Special Food Services	-	1,194	-	-	1,194

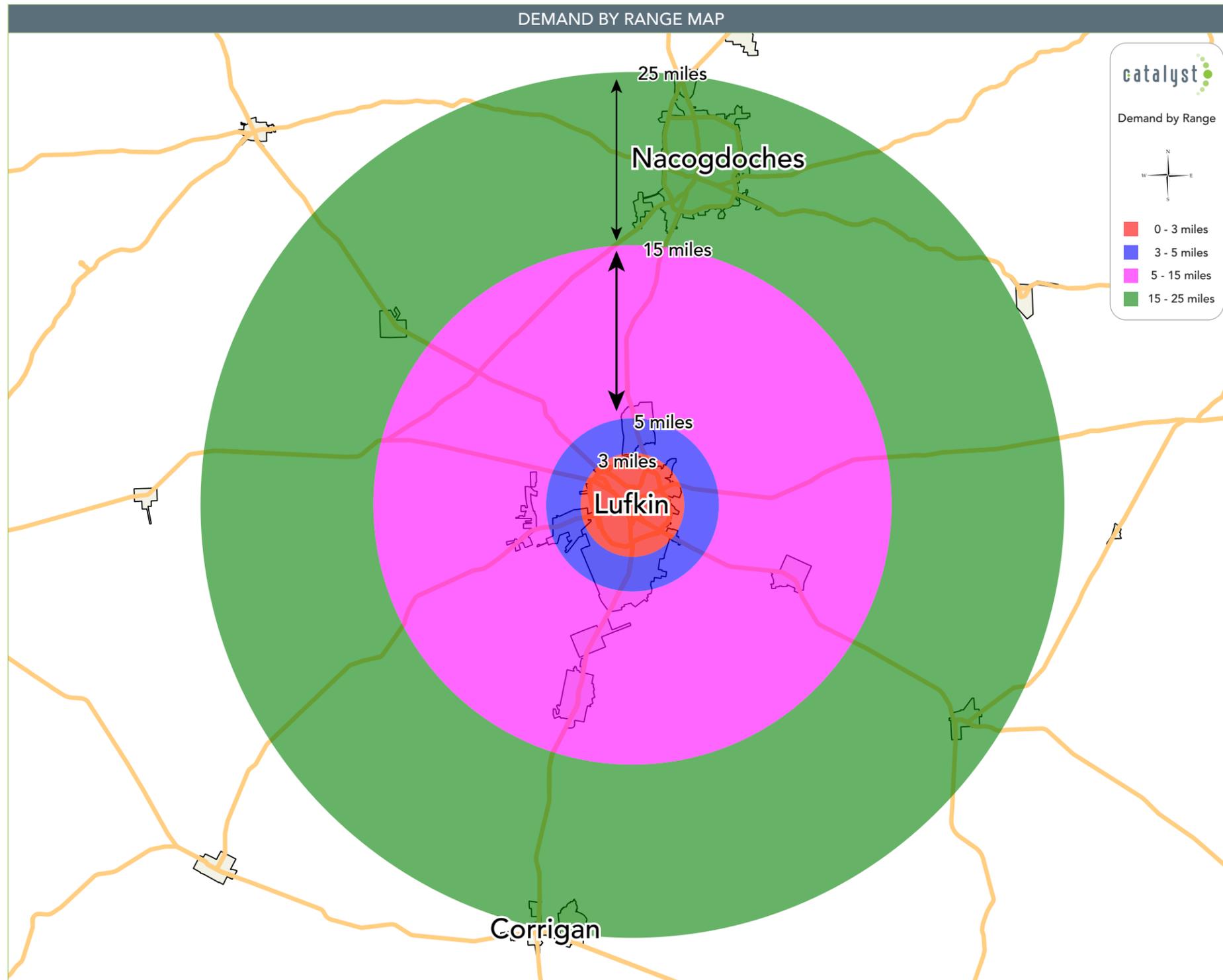
The Special Food Services industry includes Food Service Contractors, Caterers, and Street Vendors with Street Vendors being the biggest growth component of this industry (8.4% annual revenue growth from 2008 to 2013). From 2008 to 2013, the annual revenue growth for this industry was 4.0%.

DEMAND SUMMARY	0 - 3 MILES	3 - 5 MILES	5 - 10 MILES	10 - 20 MILES	TOTAL (SF)
Drinking Places - Alcoholic Beverages	1,669	3,483	3,389	2,035	10,576

This industry is still recovering from the tight wallets of the recession, and will continue to do so over the next five years. From 2008 to 2013, the annual revenue growth for this industry was 0.0%.

DEMAND SUMMARY	0 - 3 MILES	3 - 5 MILES	5 - 10 MILES	10 - 20 MILES	TOTAL (SF)
<b>Total Demand (SF)</b>	<b>11,409</b>	<b>128,030</b>	<b>324,150</b>	<b>22,618</b>	<b>486,207</b>

(Source: Catalyst, ESRI, IBISWorld)



(Source: Catalyst)

0 - 3 MILES	DEMAND (\$)	SUPPLY (\$)	GAP (\$)	ESTIMATED CAPTURE (%)	SALES/SF	DEMAND (SF)
Specialty Food Stores	\$1,085,461	\$946,437	\$139,023	100%	\$150	927
Beer, Wine & Liquor Stores	\$1,550,029	\$0	\$1,550,029	100%	\$300	5,167
Book, Periodical & Music Stores	\$1,326,278	\$232,256	\$1,094,022	100%	\$300	3,647
Drinking Places - Alcoholic Beverages	\$1,478,808	\$978,089	\$500,720	100%	\$300	1,669
<b>0 - 3 Miles Total Demand (SF)</b>						<b>11,409</b>

(Source: Catalyst, ESRI)

3 - 5 MILES	DEMAND (\$)	SUPPLY (\$)	GAP (\$)	ESTIMATED CAPTURE (%)	SALES/SF	DEMAND (SF)
Other Motor Vehicle Dealers	\$1,646,978	\$1,637,041	\$9,937	95%	\$300	31
Auto Parts, Accessories & Tire Stores	\$2,450,860	\$320,652	\$2,130,208	95%	\$500	4,047
Furniture Stores	\$2,092,812	\$1,478,716	\$614,095	80%	\$300	1,638
Home Furnishings Stores	\$1,409,207	\$659,971	\$749,235	80%	\$300	1,998
Grocery Stores	\$25,380,251	\$2,733,851	\$22,646,400	70%	\$475	33,374
Specialty Food Stores	\$766,026	\$389,382	\$376,643	80%	\$150	2,009
Beer, Wine & Liquor Stores	\$1,134,074	\$13,203	\$1,120,871	90%	\$300	3,363
Health & Personal Care Stores	\$11,921,328	\$600,325	\$11,321,003	80%	\$300	30,189
Clothing Stores	\$6,646,864	\$4,937,468	\$1,709,396	80%	\$275	4,973
Shoe Stores	\$1,124,690	\$884,474	\$240,216	80%	\$150	1,281
Jewelry, Luggage & Leather Goods Stores	\$1,346,341	\$597,398	\$748,944	80%	\$315	1,902
Sporting Goods/Hobby/Musical Instr Stores	\$2,947,354	\$1,832,648	\$1,114,706	80%	\$300	2,973
Book, Periodical & Music Stores	\$924,581	\$75,706	\$848,875	80%	\$300	2,264
Department Stores Excluding Leased Depts.	\$9,774,498	\$4,810,058	\$4,964,440	80%	\$300	13,239
Florists	\$185,683	\$97,302	\$88,381	90%	\$300	265
Office Supplies, Stationery & Gift Stores	\$968,305	\$183,874	\$784,431	80%	\$300	2,092
Used Merchandise Stores	\$809,011	\$329,870	\$479,142	80%	\$150	2,555
Limited-Service Eating Places	\$8,508,118	\$3,720,313	\$4,787,805	95%	\$300	15,161
Special Food Services	\$456,582	\$79,634	\$376,948	95%	\$300	1,194
Drinking Places - Alcoholic Beverages	\$1,105,040	\$5,254	\$1,099,786	95%	\$300	3,483
<b>3 - 5 Miles Total Demand (SF)</b>						<b>128,030</b>

(Source: Catalyst, ESRI)

5 - 15 MILES	DEMAND (\$)	SUPPLY (\$)	GAP (\$)	ESTIMATED CAPTURE (%)	SALES/SF	DEMAND (SF)
Automobile Dealers	\$41,960,019	\$9,090,118	\$32,869,901	50%	\$300	54,783
Other Motor Vehicle Dealers	\$2,620,433	\$1,625,992	\$994,441	50%	\$300	1,657
Auto Parts, Accessories & Tire Stores	\$3,750,269	\$1,398,235	\$2,352,034	50%	\$500	2,352
Furniture Stores	\$3,224,834	\$1,576,845	\$1,647,989	50%	\$300	2,747
Home Furnishings Stores	\$2,108,572	\$343,109	\$1,765,463	50%	\$300	2,942
Electronics & Appliance Stores	\$6,828,288	\$214,564	\$6,613,724	50%	\$300	11,023
Lawn & Garden Equip & Supply Stores	\$1,109,423	\$659,905	\$449,519	50%	\$300	749
Grocery Stores	\$40,739,505	\$20,052,383	\$20,687,123	50%	\$475	21,776
Health & Personal Care Stores	\$19,561,677	\$417,438	\$19,144,239	50%	\$300	31,907
Gasoline Stations	\$30,415,719	\$957,541	\$29,458,179	30%	\$300	29,458
Clothing Stores	\$9,925,892	\$672,609	\$9,253,283	50%	\$275	16,824
Shoe Stores	\$1,718,402	\$0	\$1,718,402	50%	\$150	5,728
Jewelry, Luggage & Leather Goods Stores	\$1,958,576	\$120,006	\$1,838,570	50%	\$315	2,918
Sporting Goods/Hobby/Musical Instr Stores	\$4,607,632	\$1,003,656	\$3,603,975	50%	\$300	6,007
Book, Periodical & Music Stores	\$1,368,353	\$54,771	\$1,313,582	50%	\$300	2,189
Department Stores Excluding Leased Depts.	\$15,168,924	\$4,147,941	\$11,020,983	50%	\$300	18,368
Other General Merchandise Stores	\$28,105,110	\$294,449	\$27,810,660	50%	\$200	69,527
Florists	\$307,361	\$153,441	\$153,920	30%	\$300	154
Office Supplies, Stationery & Gift Stores	\$1,545,428	\$341,697	\$1,203,731	50%	\$300	2,006
Used Merchandise Stores	\$1,205,187	\$204,508	\$1,000,678	30%	\$150	2,001
Other Miscellaneous Store Retailers	\$3,913,373	\$2,144,613	\$1,768,761	20%	\$215	1,645
Full-Service Restaurants	\$9,822,791	\$1,024,875	\$8,797,915	70%	\$425	14,491
Limited-Service Eating Places	\$13,023,005	\$4,662,645	\$8,360,360	70%	\$300	19,508
Drinking Places - Alcoholic Beverages	\$1,548,038	\$95,772	\$1,452,266	70%	\$300	3,389
<b>5 - 15 Miles Total Demand (SF)</b>						<b>324,150</b>

(Source: Catalyst, ESRI)

15 - 25 MILES	DEMAND (\$)	SUPPLY (\$)	GAP (\$)	ESTIMATED CAPTURE (%)	SALES/SF	DEMAND (SF)
Home Furnishings Stores	\$5,400,388	\$3,029,033	\$2,371,355	20%	\$300	1,581
Grocery Stores	\$101,922,468	\$94,330,890	\$7,591,578	20%	\$475	3,196
Beer, Wine & Liquor Stores	\$4,412,466	\$2,510,199	\$1,902,267	20%	\$300	1,268
Health & Personal Care Stores	\$47,938,415	\$36,396,456	\$11,541,959	20%	\$300	7,695
Jewelry, Luggage & Leather Goods Stores	\$5,109,295	\$3,522,987	\$1,586,308	20%	\$315	1,007
Sporting Goods/Hobby/Musical Instr Stores	\$11,585,420	\$11,575,170	\$10,250	20%	\$300	7
Book, Periodical & Music Stores	\$3,619,211	\$362,733	\$3,256,477	20%	\$300	2,171
Florists	\$741,469	\$536,699	\$204,770	20%	\$300	137
Used Merchandise Stores	\$3,161,000	\$1,683,376	\$1,477,624	20%	\$150	1,970
Limited-Service Eating Places	\$33,265,701	\$30,939,249	\$2,326,453	20%	\$300	1,551
Drinking Places - Alcoholic Beverages	\$4,131,884	\$1,079,115	\$3,052,770	20%	\$300	2,035
<b>15 - 25 Miles Total Demand (SF)</b>						<b>22,618</b>

(Source: Catalyst, ESRI)

**LIFESTYLE SEGMENTATION/PSYCHOGRAPHIC ANALYSIS**

The 72-segment Community Tapestry system classifies U.S. neighborhoods based on their socioeconomic and demographic compositions. The versatility of Community Tapestry provides several methods of dividing the 72 Neighborhood segments into summary groups for a broader view of U.S. neighborhoods. There are 15 summary groups that include traditional geo-demographic factors, including family status, affluence, age, family status, ethnicity, and degree of urbanization.

**CORNUCOPIA**

Like the patchwork of freshly plowed fields, rows of crops, and seas of wheat blowing in the wind that you might see out the window of a plane as you fly over a typical rural area in America, the Cornucopia is a patchwork of rural communities that don't fit into any of the other segments. This group of Living With Nature segments is young: the residents range from 20-somethings to the low-30s. This group of mixed demographics is primarily married-with-children, but they have even more children than the other segments. They have the least-educated demographic in this segment, with close to 50-percent-higher-than-average percent without even high-school degrees. These segments are home to a well-above-average number of self-employed individuals, and a similarly high-level of people seeking public assistance. They are not easily pegged on income levels, since the median household income is too broad to classify without misleading market researchers. However, the Cornucopia segments are a pretty solidly blue-collar bunch, working in areas such as construction, repair services, production, and transportation. But while they rank at or near 50-percent-above-average in these jobs, they rank at a spectacular four-times-the-national-average in the category of farming, fishing, and forestry.

**BLUE COLLAR STARTS**

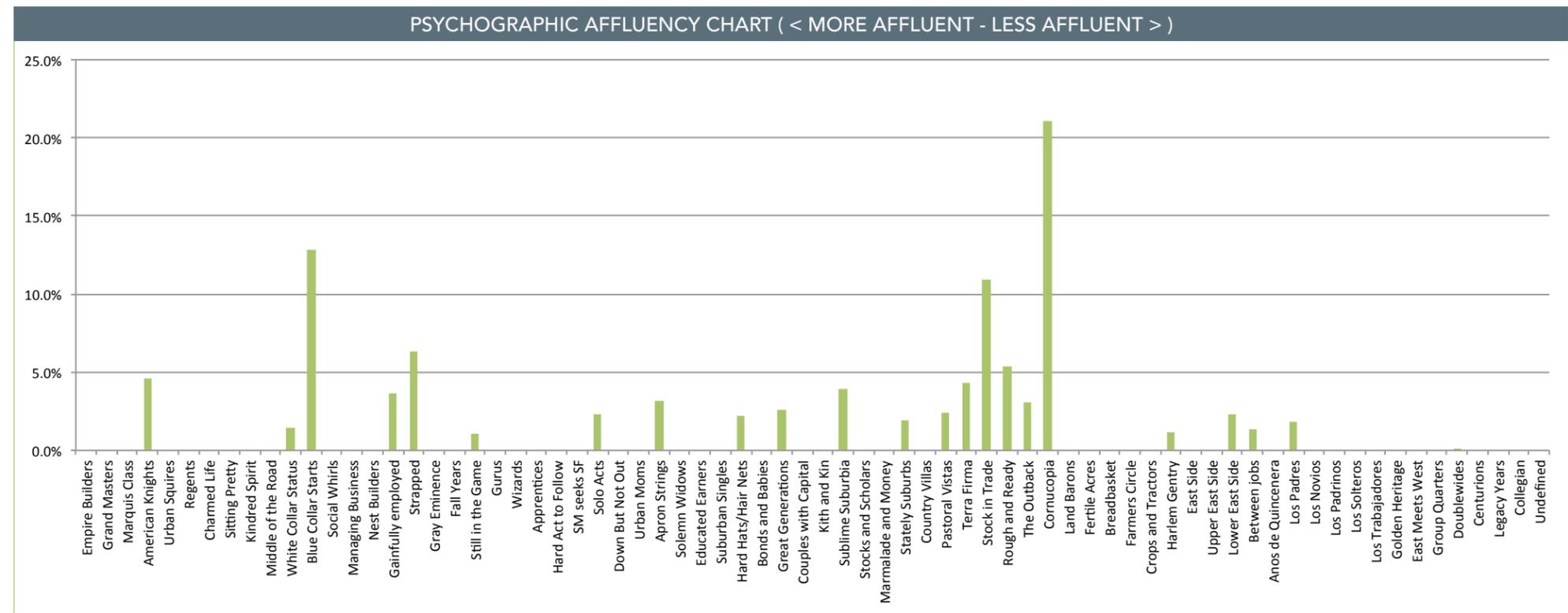
The residents in Blue-Collar Starts neighborhoods struggle financially the most among their Urban Cliff Climbers brethren. They not only support themselves in blue-collar positions, they also have a commensurately lower education level: a significant percent have less-than-high-school education levels. While an average-number of these 20- to 30-year-old are married-with-children, they have higher rates of residents who are single householders (either male or female) with children, especially younger children. All of these factors help explain the fact that Blue-Collar Starts supplement their less-than-\$30,000 incomes from production, transportation, construction, and building maintenance jobs with some level of public assistance income. They most likely enjoy fewer of life's comforts than many other Americas — and work harder for what they do own.

**STOCK IN TRADE**

Stock in Trade areas are home to the "salt of the earth" types — in other words, these rural segments are the most ordinary of all segments in the Living With Nature category. Thinking of an average rural dweller and you think of the many workers that are keeping America's farmers, factory workers, and construction backbone. They have a near-average level of married couples with an average level of children. They do, however, have a slightly above-average level of high school educated individuals. Other standout demographics are occupations: They rank over 50-percent-above-average in construction, repair services, and production. However, they weigh in at two-times-the-national-average for employment in farming, fishing, and forestry.

TOP TAPESTRY SEGMENTS (PRIMARY TRADE AREA) TABLE 10			
RANK	TAPESTRY SEGMENT	CATEGORY	% OF HOUSEHOLDS
1	Cornucopia	Living with Nature	21.1%
2	Blue Collar Starts	Urban Cliff Climbers	12.8%
3	Stock in Trade	Living with Nature	10.9%
4	Strapped	Urban Cliff Dwellers	6.3%
5	Rough and Ready	Living with Nature	5.3%
6	American Knights	Creme de la Creme	4.6%
7	Terra Firma	Living with Nature	4.3%
8	Sublime Suburbia	Married in the Suburbs	3.9%
9	Gainfully Employed	Urban Cliff Dwellers	3.6%
10	Apron Strings & Hard Hats	Struggling Alone	3.1%

(Source: STI PopStats)



(Source: Catalyst)

These hard-working manual-laborers earn incomes in a median range from the high-\$30,000s to the \$40,000s. While some of them are self-employed, a well-below average percentage have income from Investments/dividends. And they range from slightly below-average-to-average in receiving income from public assistance and supplemental security.

#### **STRAPPED**

Strapped neighborhoods, which consist of 30-year-olds (some with kids) and a smattering of retirees, are the financial strugglers of the Urban Cliff Dwellers category. One reason for their harder-row-to-hoe status may be their lower education level. They have a higher-than-average number of residents without high-school degrees. Plus, this group subsists on less than \$30,000-a-year, which they earn from a combination of both wages and public assistance. The older residences are naturally already dipping into social security. They are the only segment in this category with statistically significant measurements in the blue-collar occupational category. Their occupations vary across the traditional blue-collar range, with a particularly large number in the production industries. Other common occupational industries are repair services, construction, grounds maintenance, food preparation, and healthcare support. Strapped residents' no-frills shopping strategy probably includes keeping a sharp eye out for sales on the basic necessities of life.

#### **ROUGH AND READY**

Rough & Ready neighborhood segments are, as their name implies, home to many rugged individualists. The segment has both a higher-than average percentage of people earning self-employment income and working in manual-labor blue collar jobs, such as production, transportation, repair services, and construction. But what really distinguishes these areas are the number of people employed in farming, fishing, and forestry — over-three-times-the national average! This group has nearly 50-percent-higher-than-average percent of people with high-school degrees, but very few with college educations, and virtually no college degrees. Like many other segments in the Living With Nature category, Rough & Ready residents are generally married and rank at slightly above-average in households with children. This group lives on a fairly low-income level in the low-\$30,000s or less. As a result, some residents rely on a little public assistance to occasionally put food on the table, though probably not to put a roof over their heads.

#### **AMERICAN KNIGHTS**

American Knights are the “youngsters” of the highly urban Crème de la Crème category of neighborhood segments. Not only is the median age range in the 20s and 30s, but also these areas have an above-average number of children below the age of six. These characteristics correlate to the higher-than-average number of married-with-children-under-18 households. Though young, these urban neighborhoods are home to higher-than-average number of earners in white-collar management and professional occupations. These mostly college-educated residents enjoy incomes in the \$70,000s and \$80,000s, largely from salaries and wages. They also earn incomes at a slightly-higher-than-average level from interest/dividends. However, unlike many other Crème de la Crème neighborhoods, who have higher self-employment income levels, the American Knights residents are just at the national average in this measurement.

#### **TERRA FIRMA**

True to their rural Living With Nature category roots, the Terra Firma neighborhoods are home to an above-average number of people working in farming, fishing, and forestry occupations. In fact, they rank at nearly three-times-the-national-average on this scale. Combine this with their 50-percent-aboveaverage level of self-employment income, and it's clear Terra Firma areas are inhabited by many independent people working and living close to Mother Earth. They also rank higher-than-average in other employment sectors: namely, production, transportation, repair services,

and construction. Along with their blue-collars, these residents share other demographics with the classic perception of a “true-blue American.” They are predominately married with children (slightly more in their teens than in diapers). They have high-school educations, with a smattering of college. And they invest a little money (they rank slightly above-average in interest/dividend income), even though they're living on a relatively modest income level. The median income range for Terra Firma areas is from the high-\$30,000s to the \$40,000s. However, they're smart spenders, because very few are seeking public assistance to pay the bills.

#### **SUBLIME SUBURBIA**

Incomes go farther when there are no children to clothe, house, educate, and entertain. For a glimpse of suburban lifestyles with predominately married 30-year-olds, earning \$50,000s and \$60,000s, and with no children to support, take a drive through Sublime Suburbia segments. You're likely to find very comfortable homes on average size lots, because residents in these areas are able to maintain a solid average level of the American dreamscape by working hard and investing moderately. These segments are the most average in the Married in the Suburbs category — including average rankings in married-households, college educations, and employment in jobs such as management, food preparation, personal care, sales, office administration, and the repair industry. This group is also earning a slightly above-average level of investment income, which speaks to their comfortable lifestyle. They also show a slightly above-average level of retirement income, which indicates a patchwork of 65-plus residents among the “youngsters.”

#### **GAINFULLY EMPLOYED**

True to their Urban Cliff Dwellers category, Gainfully Employed neighborhoods are distinguished by a dominant age range in the 30s. But they are not entirely generationally homogenous, because they are also home to an aboveaverage number of 65-plus-year-olds. This fact speaks to their slightly-less-than-average percent of children in their largely two-couple families. This fact also gives these areas a nearly-dead-on-average income from wages and salaries, as well as a somewhat higher-than-average income from retirement/social security. For those who are still working, their primary occupations are production, repair services, transportation, office administration, and healthcare support. The salary range for Gainfully Employed is \$30,000s to \$40,000s.

#### **APRON STRINGS & HARD HATS**

Apron Strings & Hard Hats rank almost 50-percenthigher-than-the-national-average in single households. A slightly-above-average number of the predominately 30-year-old residents of this highly urban Struggling Alone category have never been married, but more often they are divorced or widowed: They measure 50-percent-higher-than-average in both circumstances. These singles have some children, creating neighborhoods with either single men or women raising children under 17 alone. In fact, the household compositions measure 75-pecenthigher-than-average in single-parent families. Some of these residents have never been married, but over 50-percent-more-than-average are widowed or divorced. Apron Strings areas are below-average in education, measuring below-average on college and 50- percent-higher-than-average level of people without high-school degrees. This number correlates to their occupational categories, which are predominately in these areas: Those who have jobs work in blue-collar positions, with about a 50-percent-higher-than-average showing in healthcare, food preparation, building maintenance, production, and transportation. Incomes for this group are below or in the \$30,000s. Not surprisingly, they rely heavily on public assistance to make ends meet: Measuring at almost two-times average in this area. Apron Strings' above-average number of 65-plus-year-olds are also pulling some income from social security. Overall, residents of Apron Strings & Hard Hats segments have their lives full just to keep it together.

**EXISTING RETAIL USES AND CATEGORIES**

In an effort to better understand the retail potential of the Primary Trade Area (PTA), Catalyst completed a comprehensive market wide study of the existing retailers within the city limits of Lufkin. Data is compiled in the Catalyst Merchant Matrix (see Appendix 1), and included the use by category and location. Further analysis of the Catalyst Merchant Matrix allows for deeper insight into the distribution of uses of the retail market within the PTA. The results paint the picture of the retail categories which exist and are oversaturated, under supplied or void of representation. This data is useful in developing a clearer understanding of what types of retail are existing in the market, as well as, what types of retail are missing in the market for one reason or another. From the data compiled, Catalyst can begin to formulate a game plan as to which retail categories should be considered further. Categories which already have optimal market penetration and those which appear to be oversaturated should be evaluated further to determine if these uses should be eliminated from consideration. Void or underrepresented categories are evaluated based upon factors such as alignment with the vision of the city, co-tenancy, demand/leakage analysis and demographic and psychographic profiles within the study area.

CATEGORY TABLE	COUNT
Apparel - Bridal/Formal - 448190	1
Apparel - Discount - 448140	6
Apparel - Womens - 448150 - 448120	4
Apparel Retail - 448110	12
Apparel Retail - Childrens - 448130	1
Apparel Retail - High End/Luxury	1
Automotive - Rental - 532111	1
Automotive Retailer - 4413	7
Automotive Service - 447190	10
Bank - 522110	23
Book Store - 451211	1
Check Cashing/Pawn/Thrift - 522390	7
Child Care/Education - 624410	3
Consumer Electronics Retail - 443112	4
Convenience Store - 445120	30
Dollar/Variety Stores - 452990	12
Dry Cleaning/Laundry - 812320 - 812310	7
Entertainment - 71	3
Fabric Retail - 451130	1
Financial/Tax Service - 523930 - 541213 - 541211	18
Floor Covering - 442210	3
Florist - 453110	3

CATEGORY TABLE	COUNT
General Merchandise Stores - 452910	7
Grocery - 445110	8
Hair Cutter/Salon - 812112	19
Hardware/Home Improvement - 444130 - 444110	6
Health & Beauty Care Locations - 453998	5
Health Clubs/Gyms - 713940	5
Hobbies/Craft/Art Supplies - 453998 - 451120	3
Home Furnishings - 442210 - 442291	11
Hotel - 721110	18
Household Appliance - 443111	1
Houseware/Giftware - 442299	9
Insurance - 524210	8
Jewelry - 448310	7
Luggage/Leather Goods - 448320	1
Major Appliances - 443111	1
Medical - Dentist - 621210	2
Medical - Family Practice - 621111	2
Medical - Other - 621111	10
Medical - Pediatrics - 621111	1
Medical - Post Acute - Rehabilitation - 621493	2
Medical - Supplies & Equipment - 446199	2
Movie Theater - 512131	1
Music/Video - 443111	1
Nail Salon - 812113	11
Office - Attorney - 541110	24
Office - Other - 523120 - 531120 - 522310	5
Office - Real Estate Company - 531210	4
Other	17
Outdoor/Pool/Patio - 337124 - 453998	2
Paper/Party Goods - 453220	5
Pet Store - 453910	1
Pharmacy - 446110	7
Photocopy/Printing - 323114	5
Photofinishing/Portrait Studios - 812921 - 541921	5
Postal retail - 561431	3
Rental Centers - 532310	3
Restaurant - American - 722110	20

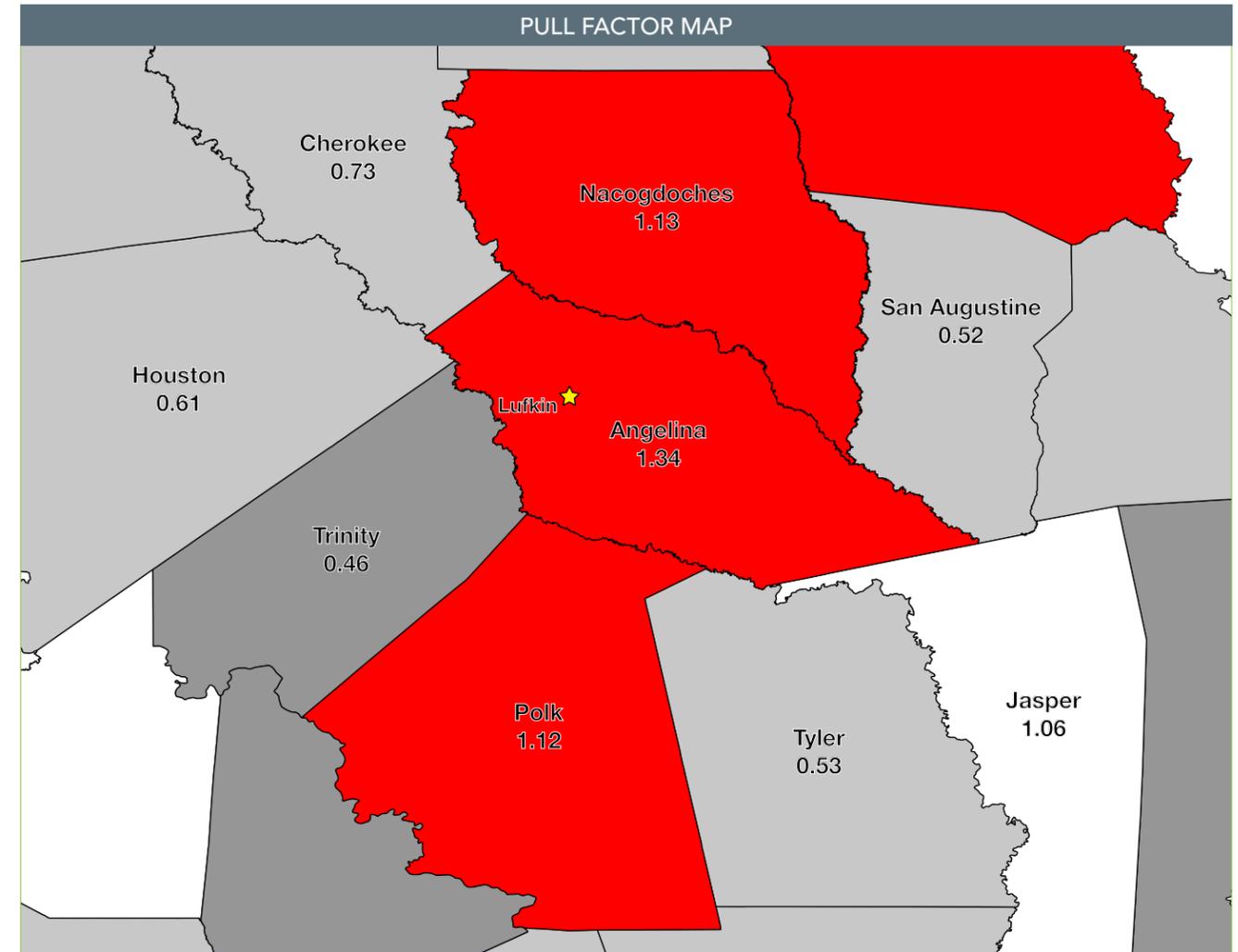
CATEGORY TABLE	COUNT
Restaurant - Bar/Nightclub - 722410	2
Restaurant - Barbecue - 722110 - 72211	5
Restaurant - Burgers - 722110	3
Restaurant - Burrito - 722110	2
Restaurant - Cajun - 722110	1
Restaurant - Chinese - 722110	6
Restaurant - Coffee - 722211	1
Restaurant - Dessert - 722110	8
Restaurant - Health Food - 722110	1
Restaurant - Ice Cream/Yogurt - 722211	4
Restaurant - Italian - 722110	2
Restaurant - Japanese - 722110	1
Restaurant - Limited Service & Fast food - Burger - 722211	11
Restaurant - Limited Service & Fast food - Chicken - 722211	5
Restaurant - Limited Service & Fast food - Mexican - 722211	7
Restaurant - Limited Service & Fast food - Seafood - 722211	1
Restaurant - Mexican - 722110	9
Restaurant - Pizza - 722110 - 722211	7
Restaurant - Sandwich/Deli - 722110 - 722111	6
Restaurant - Seafood - 722110	2
Restaurant - Wings - 722110	2
Self Storage - 531130	10
Shoe Store - 448210	3
Sign Company -339350 - 541890	1
Spa - 812199	2
Sporting Goods Store - 451110	4
Tanning - 812199	1
Tax and Investment Services - 541213 - 523930	2
Wholesale Club	1
Wireless Store - 443112	6
<b>GRAND TOTAL</b>	<b>516</b>

**COMPETITIVE ANALYSIS**

The Angelina County Trade Pull Factor adjusted for per capita income is 1.313, or higher than the State of Texas average pull factor for all Texas counties (1). The pull factor measures the relative strength of the county in relation to the surrounding counties. The 1.313 pull factor is another documented measurement of the existing strength and importance of the retail industry within the City of Lufkin, Angelina County, and eastern Texas. The table to the right shows the pull factor and variables used to calculate pull factor of the surrounding counties. North of Angelina County is Nacogdoches County which is home to the City of Nacogdoches, Stephen F. Austin State University, and a strong retail market. Of the surrounding eight counties, three have a positive pull factor: Jasper County (Jasper), Nacogdoches County (Nacogdoches), and Polk County (Livingston).

As previously mentioned, 10% of customer samples of the PTA were drawn from Downtown Lufkin whose trade area strongly resembled that of the PTA. Downtown will continue to attract customers with the unique character it provides at The Pines Theater in addition to boutique retailers. South Timberland Drive will continue to focus towards the supplying retail food needs of the local population, while west Frank avenue will provide retail and basic services to the local population.

The US Highway 59 corridor and south Loop 287 offer retail synergies for the local population, Angelina college, traveling customers and/or customers located outside the city limits in the regional area. This intersection will likely be the focus of national retail development in the years to come, because of the proximity to existing national retail.



(Source: Catalyst)

GEOGRAPHY	POPULATION	SALES	PER CAPITA SALES	PER CAPITA INCOME	PULL FACTOR
<b>Angelina</b>	<b>87,158</b>	<b>\$490,837,313</b>	<b>\$5,632</b>	<b>\$20,742</b>	<b>1.338</b>
<b>Lufkin</b>	<b>35,390</b>	<b>\$449,455,378</b>	<b>\$12,700</b>	<b>\$20,168</b>	
Nacogdoches	65,623	\$293,468,736	\$4,472	\$19,170	1.126
Polk	46,348	\$190,413,617	\$4,108	\$17,647	1.124
Jasper	35,954	\$159,058,034	\$4,424	\$20,229	1.056
Cherokee	51,518	\$146,345,656	\$2,841	\$18,785	0.730
Houston	23,798	\$61,764,187	\$2,595	\$20,459	0.612
Tyler	21,983	\$49,822,965	\$2,266	\$20,717	0.528
San Augustine	8,867	\$16,359,218	\$1,845	\$17,304	0.515
Trinity	14,513	\$29,460,299	\$2,030	\$21,332	0.459

(Source: Catalyst)



# City of Lufkin Retail Market Analysis

September 2013



catalyst

CATEGORY/RETAILER	COUNT
<b>Apparel - Bridal/Formal - 448190</b>	
Lesa's Bridal & Formal Wear	1
<b>Apparel - Discount - 448140</b>	
Belk	1
Burke's Outlet	1
Citi Trends	1
Quality Bargains	1
Ross	1
Fallas Discount Store	1
<b>Apparel - Womens - 448150 - 448120</b>	
Allure Dresses	1
Jasmine's Boutique	1
Julie's Fashion	1
Twisted Sisters	1
<b>Apparel Retail - 448110</b>	
Army/Navy Store	1
Baton Boutique	1
Cavender's Boot City	1
It's Fashion Metro	1
Lady's Alterations	1
Mr. G's Fashions	2
Old Navy	1
The Spotted Zebra	1
The Treasure Chest	1
Harmonies...A Store	1
rue21	1
<b>Apparel Retail - Childrens - 448130</b>	
The Baby's Room	1
<b>Apparel Retail - High End/Luxury</b>	
Bosses Mens Store	1
<b>Automotive - Rental - 532111</b>	
Enterprise Rent-A-Car	1
<b>Automotive Retailer - 4413</b>	
ABC Auto Parts	1
Advance Auto Parts	1
Auto Zone	1
Car Quest Auto Parts	1

CATEGORY/RETAILER	COUNT
Napa Auto Parts	1
O'Reilly Auto Parts	2
<b>Automotive Service - 447190</b>	
Ace Transmissions	1
Air Cooled Engines	1
Cook Tire	1
Discount Tire	1
Frank's Tire King	1
Gateway Tire Service	1
Goodyear	1
Lee Transportation Services	1
Precision Autobody	1
Zappy's Car Wash	1
<b>Bank - 522110</b>	
Angelina Savings Bank	1
Atlas Credit Company	1
Bancorp South Bank	2
Bank of America	2
Capital One Bank	1
Commercial Bank of Texas	2
Covington Credit Loans	1
First Bank & Trust	2
Genco Federal Credit Union	1
Huntington State Bank	2
Lufkin Federal Credit Union	1
Regions Bank	4
Southland Federal Credit Union	1
Texan Credit Corp.	1
Texas State Bank	1
<b>Book Store - 451211</b>	
Buy the Book	1
<b>Check Cashing/Pawn/Thrift - 522390</b>	
Insta Cash Pawn	1
J&M, Too	1
Loans by Gold Star	1
Pawn Shop	2
Swift Cash Loans	1

CATEGORY/RETAILER	COUNT
Thrifty Loans	1
<b>Child Care/Education - 624410</b>	
Angelina Playhouse	1
Learning Tree Pre-School	1
Lufkin Head Start	1
<b>Consumer Electronics Retail - 443112</b>	
Best Buy	1
Discount Computer Depot	1
Radio Shack	1
Sound Tech	1
<b>Convenience Store - 445120</b>	
C-Store	30
<b>Dollar/Variety Stores - 452990</b>	
Dollar General	6
Dollar King	1
Dollar Tree	1
Family Dollar	4
<b>Dry Cleaning/Laundry - 812320 - 812310</b>	
Cleaners	1
Gaslight Cleaners	1
Modern Cleaners	1
Regency Cleaners	2
Rudd Cleaners	2
<b>Entertainment - 71</b>	
Game Stop	1
Game X Change	1
Lufkin Lanes	1
<b>Fabric Retail - 451130</b>	
Ricks Sewing Machine Center	1
<b>Financial/Tax Service - 523930 - 541213 - 541211</b>	
A&J Tax Express	1
ACE Check Cashing	1
Advance America	1
Cash Now	1
Check 'n Go	1
EZ Loan	1
H&R Block	2

CATEGORY/RETAILER	COUNT	CATEGORY/RETAILER	COUNT	CATEGORY/RETAILER	COUNT
One Main Financial	1	Academy of Hair	1	Hobby Lobby	1
Security Finance	1	Act 3 Beauty Salon	1	Mama Tried	1
Shamrock Finance	1	All About You Salon	1	<b>Home Furnishings - 442210 - 442291</b>	
Springleaf Financial	1	Curve's Hair Care	1	Ashley Furniture	1
Texas Car & Title Loans	1	Forthcoming Beauty Shop	1	Dixon Furniture	1
The Loan Depot	1	Hair Gallery	1	Furniture Fetish	1
Toledo Finance	1	Haircuts Plus	1	Galaxy Sleep Shop	1
Tom Flournoy Investments	1	Hallelulah House of Hair	1	Home Town Mattresses	1
Winston Investments	1	J&M Beauty Salon	1	Ivan Furniture	1
World Finance Loans & Taxes	1	Mane Attraction Beauty Salon	1	J&G Hearth & Home	1
<b>Floor Covering - 442210</b>		S'Beauty	1	Lewis Furniture	1
Quality Discount Floors Etc.	1	Salon	1	Lifestyle Furniture Showroom	1
Roberts Floors	1	Sassy Reds Hair Salon	1	Mattress Firm	1
Royal Interiors Flooring	1	Texas Tanglers Hair & Nails	1	Texas Heritage Furniture	1
<b>Florist - 453110</b>		Ultra Cuts	1	<b>Hotel - 721110</b>	
Buzzy Bee Flower & Gift Shop	1	Shear Expressions	1	Beam's Motel	1
Florist	1	<b>Hardware/Home Improvement - 444130 - 444110</b>		Best Western	1
Flower Pot	1	Abrey & Son's Hardware	1	Comfort Suites	1
<b>General Merchandise Stores - 452910</b>		Double R Feed & Ranch Supply	1	Courtyard Hotel	1
Bed Bath & Beyond	1	Harbor Freight Tools	1	Executive Inn & Suites	1
Big Lots	1	Home Depot	1	Hampton Inn & Suites	1
K-Mart	1	Lowe's Home Improvement	1	Holiday Inn Express	1
Office Depot	1	Tractor Supply Co.	1	Holiday Travel	1
Story Wright Office Supplies	1	<b>Health &amp; Beauty Care Locations - 453998</b>		La Quinta Inn	1
Target	1	Body's in Balance Therapeutic	1	La Unica Express	1
Walmart	1	Complete Nutrition	1	Lewis Motel	1
<b>Grocery - 445110</b>		Merle Norman	1	Lufkin Inn	1
Brookshire Brothers	3	RDA Pro Mart	1	Petty's Motor Motel	1
HEB	1	Sally Beauty Supply	1	Quality Inn & Suites	1
Massingill's Meat Market	1	<b>Health Clubs/Gyms - 713940</b>		Sun-N-Pines Motel	1
Mexican Meat Market	1	Anytime Fitness	1	Super 6 Inn	1
Morning Glory Natural Foods	1	ATA Black Belt Academy	1	Texas Inn & Suites	1
The Choice Cut Meat Market	1	Bud Maddox Baseball Academy	1	59 Texas Inn	1
<b>Hair Cutter/Salon - 812112</b>		Curves	1	<b>Household Appliance - 443111</b>	
A Hot Mess Salon	1	Ultrafit Gym	1	Conn's	1
A&G Barber Shop	1	<b>Hobbies/Craft/Art Supplies - 453998 - 451120</b>		<b>Houseware/Giftware - 442299</b>	
A1 Salon	1	Art First	1	Custom Lamps	1

CATEGORY/RETAILER	COUNT	CATEGORY/RETAILER	COUNT	CATEGORY/RETAILER	COUNT
Heritage Antiques	1	Hearing Impaired	1	Duane Shaw - Attorney at Law	1
Howard's Antique Emporium & Tea Room	1	Hospice In The Pines	1	Joe Register - Attorney at Law	1
Intense Scents & Gifts	1	Oakley Metcaf Funeral Home	1	John Sloan - Attorney at Law	1
Lufkin Antique Mall	1	Pineywood Home Health Care	1	Kaye Alderman - Attorney at Law	1
Maricela's Forgotten Treasures	1	Randall Medical Group	1	Law Office	1
Pastimes Toys, Games, & Gifts	1	Texas Home Health	1	Law Offices of Robert & Derek Flournoy	1
Tuesday Morning	1	Texas Optical	1	Longino Law Offices	1
Wishing Well Antiques	1	Cascade Health Services	1	Ronald Schaeffer - Attorney at Law	1
<b>Insurance - 524210</b>		<b>Medical - Pediatrics - 621111</b>		Stephen Zayler - Attorney at Law	1
A1 Insurance	1	Angelina Pediactrics	1	Susan Ward - Attorney at Law	1
Acceptance Insurance	1	<b>Medical - Post Acute - Rehabilitation - 621493</b>		Wayne Haglund - Attorney at Law	1
Allstate	2	Regional Physical Therapy Center	1	William Winston - Attorney at Law	1
Auto Insurance	1	Woodland Heights Rehabilitation Center	1	Cassels & Reynolds - Attorneys at Law	1
Lively Insurance	1	<b>Medical - Supplies &amp; Equipment - 446199</b>		Charles Dendy - Attorney at Law	1
State Farm Insurance	1	Home Medical Equipment	1	Fenley & Bate - Attorneys at Law	1
Swain & Baldwin Insurance	1	PRN Medical Supplies	1	Love & Wills - Attorneys at Law	1
<b>Jewelry - 448310</b>		<b>Movie Theater - 512131</b>		Perkins & Meyers - Attorneys at Law	1
Angelina Gold Buyer	1	Cinemark	1	Tatum & Tatum - Attorneys at Law	1
Angelina Jewlery & Repair	1	<b>Music/Video - 443111</b>		Williams & Byrd - Attorneys at Law	1
Beard Jewelry	1	Pal's Video Plus	1	Zeleskey Law Firm	1
Cavanaughs Jewelry	1	<b>Nail Salon - 812113</b>		<b>Office - Other - 523120 - 531120 - 522310</b>	
Lufkin Jewelry Repair	1	Happy Nail & Spa	1	Bob Inselmann Campaign Headquarters	1
Regal Gold Buyers	1	Martha's Nail Gallery	1	Spectrum Marketing & Research	1
Tommy's Watch & Jewelry	1	Nails	1	Studio 220	1
<b>Luggage/Leather Goods - 448320</b>		Nancy Nails & Spa	1	Studio 319	1
Oak & Leather Gallery	1	Pro Nails	1	The Savvy Agency	1
<b>Major Appliances - 443111</b>		Queen Nails	1	<b>Office - Real Estate Company - 531210</b>	
Appliance Doctor	1	Regal Nails	1	Clayton Homes	1
<b>Medical - Dentist - 621210</b>		Rose Nail Spa	1	Dickerson-Seely & Associates	1
Element Dental	1	Star Nails	1	R D Waltz Registered Land Surveyor	1
Kool Smiles Dentistry	1	Tracy Nails 2	1	Rose Cottage Resale	1
<b>Medical - Family Practice - 621111</b>		VIP Nails	1	<b>Other</b>	
Piney Woods Family Practice	1	<b>Office - Attorney - 541110</b>		Angelina & Neches River Authority	1
Urgent Doc	1	Chandler Law Office	1	Career Uniforms	1
<b>Medical - Other - 621111</b>		Claude Welch - Attorney at Law	1	Carroway Funeral Home	1
Angelina Behavioral Health	1	Dan Brazil - Attorney at Law	1	Colonial Mortuary & Cemetary Services	1
DaVita Medical	1	Don Duran - Attorney at Law	1	Cycle Heaven	1

CATEGORY/RETAILER	COUNT	CATEGORY/RETAILER	COUNT	CATEGORY/RETAILER	COUNT
Deja Vu	1	Hop & S Graphics	1	Bryan's BBQ	1
Democratic Headquarters	1	Joe Lowry Photography	1	Dickey's BBQ	1
Excel Car Wash	1	Magnolia Frame Works	1	Lufkin BBQ	1
First Street Art Gallery	1	HPC Associates	1	Pit Stop BBQ	1
Gipson Funeral Home	1	<b>Postal retail - 561431</b>		<b>Restaurant - Burgers - 722110</b>	
Goodwill	1	FedEx Freight	1	Ann's Burger Stop	1
Gypsy Tattoo	1	JRD Mail Store	1	Five Guy's	1
KRBA & KUEZ Radio Stations	1	UPS Store	1	Zesty's Burgers	1
Lufkin Truck Driving Academy	1	<b>Rental Centers - 532310</b>		<b>Restaurant - Burrito - 722110</b>	
Maid Pro	1	Aaron's	1	Bullrito's	1
Pretty Ink Tattoos	1	Rent-a-Center	2	Skyline Burrito Bowls	1
Quality Restaurant Supply	1	<b>Restaurant - American - 722110</b>		<b>Restaurant - Cajun - 722110</b>	
<b>Outdoor/Pool/Patio - 337124 - 453998</b>		Another Broken Egg Cafe	1	Ralph & Kacoo's	1
Duran Pools & Spa	1	Applebee's	1	<b>Restaurant - Chinese - 722110</b>	
The Dive Shop	1	Cheddar's	1	Chen's Chinese Restaurant	1
<b>Paper/Party Goods - 453220</b>		Chili's	1	China Buffet	1
A1 Party Rentals	1	Cotton Patch Cafe	1	China Garden Restaurant	1
East Texas Copy Systems	1	Denny's	1	China Hibachi Buffet	1
East Texas Legal Center	1	First Street Cafe	1	Empire Chinese Buffet	1
East Texas Printing	1	Golden Coral	1	Hunan Chinese Restaurant	1
Wally's Party Factory	1	IHOP	1	<b>Restaurant - Coffee - 722211</b>	
<b>Pet Store - 453910</b>		Katie's	1	Starbucks	1
Petsmart	1	Logan's Roadhouse	1	<b>Restaurant - Dessert - 722110</b>	
<b>Pharmacy - 446110</b>		Mom's Diner	1	Dee Dee Donuts	1
Abeldt's Pharmacy	1	Outback Steakhouse	1	Donuts	3
CVS	2	Pasados Cafe	1	Shiple's Donuts	1
Discount Pharmacy	1	Sake Cafe	1	Sweets & Eats	1
Walgreens	2	The Beach Restaurant & Bar	1	The Donut Palace	2
The Medicine Shoppe	1	The Lunch Box	1	<b>Restaurant - Health Food - 722110</b>	
<b>Photocopy/Printing - 323114</b>		Manhattan Fine Dining	1	Smoothie King	1
Infamous Creations	1	Ray's Drive In West	1	<b>Restaurant - Ice Cream/Yogurt - 722211</b>	
Kwik Copy Center	1	Ray's Drive In Café	1	Dairy Queen	2
Lufkin Printing Company	1	<b>Restaurant - Bar/Nightclub - 722410</b>		Marble Slab	1
Real Graphics	1	Garon's Billiards	1	Orange Leaf Frozen Yogurt	1
Story-Wright Furniture & Printing Supplies	1	Wild Horse Saloon	1	<b>Restaurant - Italian - 722110</b>	
<b>Photofinishing/Portrait Studios - 812921 - 541921</b>		<b>Restaurant - Barbecue - 722110 - 72211</b>		Olive Garden	1
Beautiful Image	1	Bodacious BBQ	1	Roma's Italian Restaurant	1

CATEGORY/RETAILER	COUNT
<b>Restaurant - Japanese - 722110</b>	
Tokyo House	1
<b>Restaurant - Limited Service &amp; Fast food - Burger - 722211</b>	
Burger King	2
McDonald's	2
Sonic	3
Wendy's	1
Whataburger	3
<b>Restaurant - Limited Service &amp; Fast food - Chicken - 722211</b>	
Chick-fil-A	1
Chicken Express	1
Church's Chicken	1
KFC	1
Popeye's Chicken	1
<b>Restaurant - Limited Service &amp; Fast food - Mexican - 722211</b>	
Jack in the Box	2
Mexico Express	1
Taco Bell	2
Taco Bueno	1
Taco Casa	1
<b>Restaurant - Limited Service &amp; Fast food - Seafood - 722211</b>	
Long John Silvers	1
<b>Restaurant - Mexican - 722110</b>	
Cafe Del Rio	1
Casa Ole	1
El Chico	1
El Taurino Mexican Grill	1
La Unica Mexican Restaurant	1
Lindo Mexican Food	1
Mariscos Mexican Restaurant	1
Mexicatessen	1
Yerberia Mexicana	1
<b>Restaurant - Pizza - 722110 - 722211</b>	
CiCi's Pizza	1
Dominos	1
Little Caesars	2
Papa Johns	1

CATEGORY/RETAILER	COUNT
Pizza Hut	2
<b>Restaurant - Sandwich/Deli - 722110 - 722111</b>	
Quizno's Subs	1
Schlotzsky's	1
Subway	3
Which Wich	1
<b>Restaurant - Seafood - 722110</b>	
Catfish King	1
Red Lobster	1
<b>Restaurant - Wings - 722110</b>	
Buffalo Wild Wings	1
Wing Stop	1
<b>Self Storage - 531130</b>	
A1 Self Storage	1
AAA Self Storage	3
Angelina Storage	1
Galaxy Movers	1
Self Storage	1
Texas Moving & Storage	1
U-HAUL	2
<b>Shoe Store - 448210</b>	
Brown's Shoe Fit Co.	1
Payless Shoes	1
Shoe Carnival	1
<b>Sign Company - 339350 - 541890</b>	
All Signs	1
<b>Spa - 812199</b>	
Maricela's Day Spa	1
Sun Spa	1
<b>Sporting Goods Store - 451110</b>	
Academy	1
Bill's Gun Trader	1
Golf USA	1
Sport Threads	1
<b>Tanning - 812199</b>	
Island Lite Tanning	1
<b>Tax and Investment Services - 541213 - 523930</b>	

CATEGORY/RETAILER	COUNT
Edward Jones	2
<b>Wholesale Club</b>	
Sam's Club	1
<b>Wireless Store - 443112</b>	
AT&T	2
Cellular One	1
DC Wireless	1
Metro PCS	1
Verizon	1
<b>GRAND TOTAL</b>	<b>516</b>

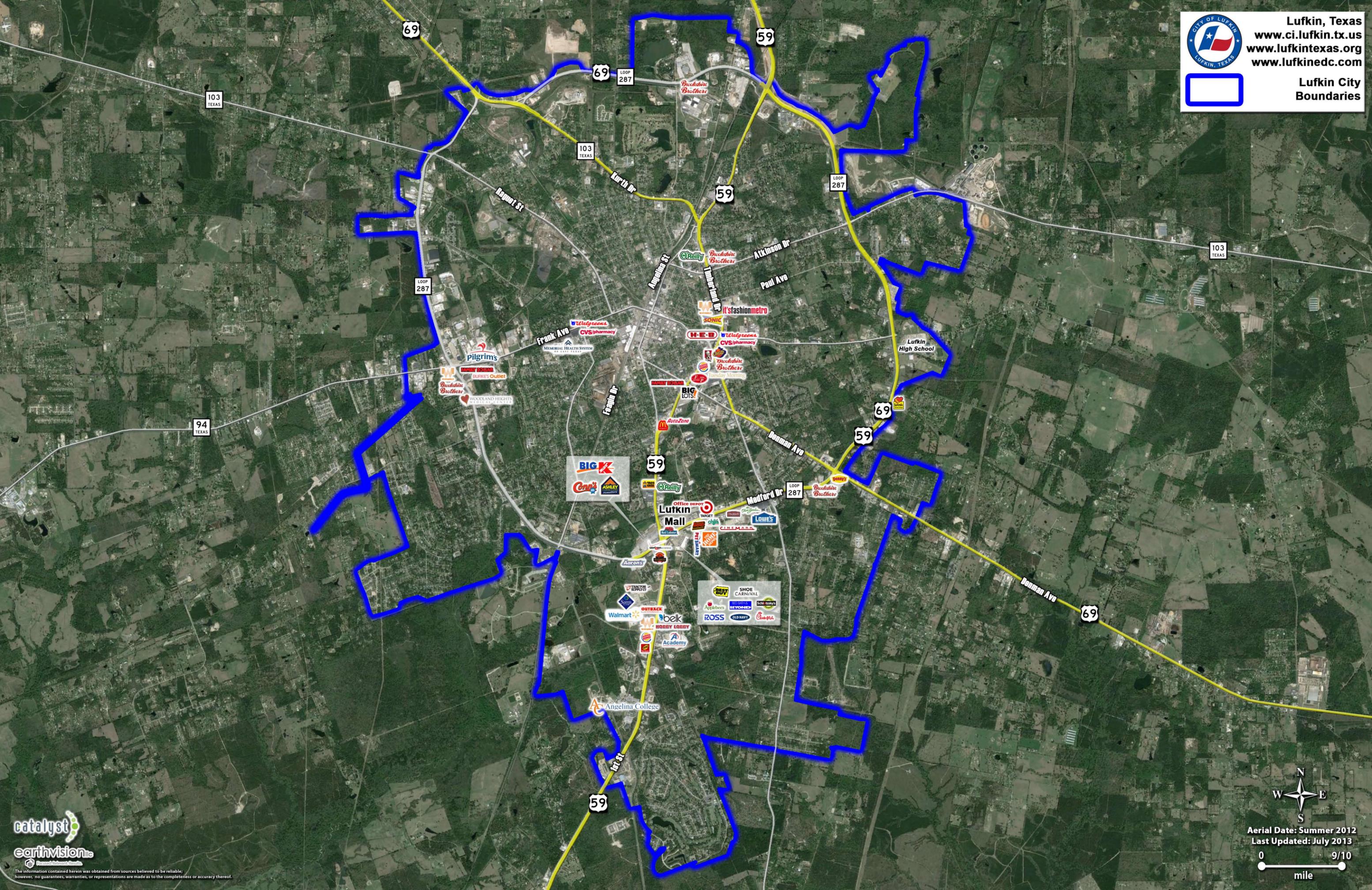


# City of Lufkin Retail Market Analysis

September 2013



catalyst



Aerial Date: Summer 2012  
 Last Updated: July 2013





# City of Lufkin Retail Market Analysis

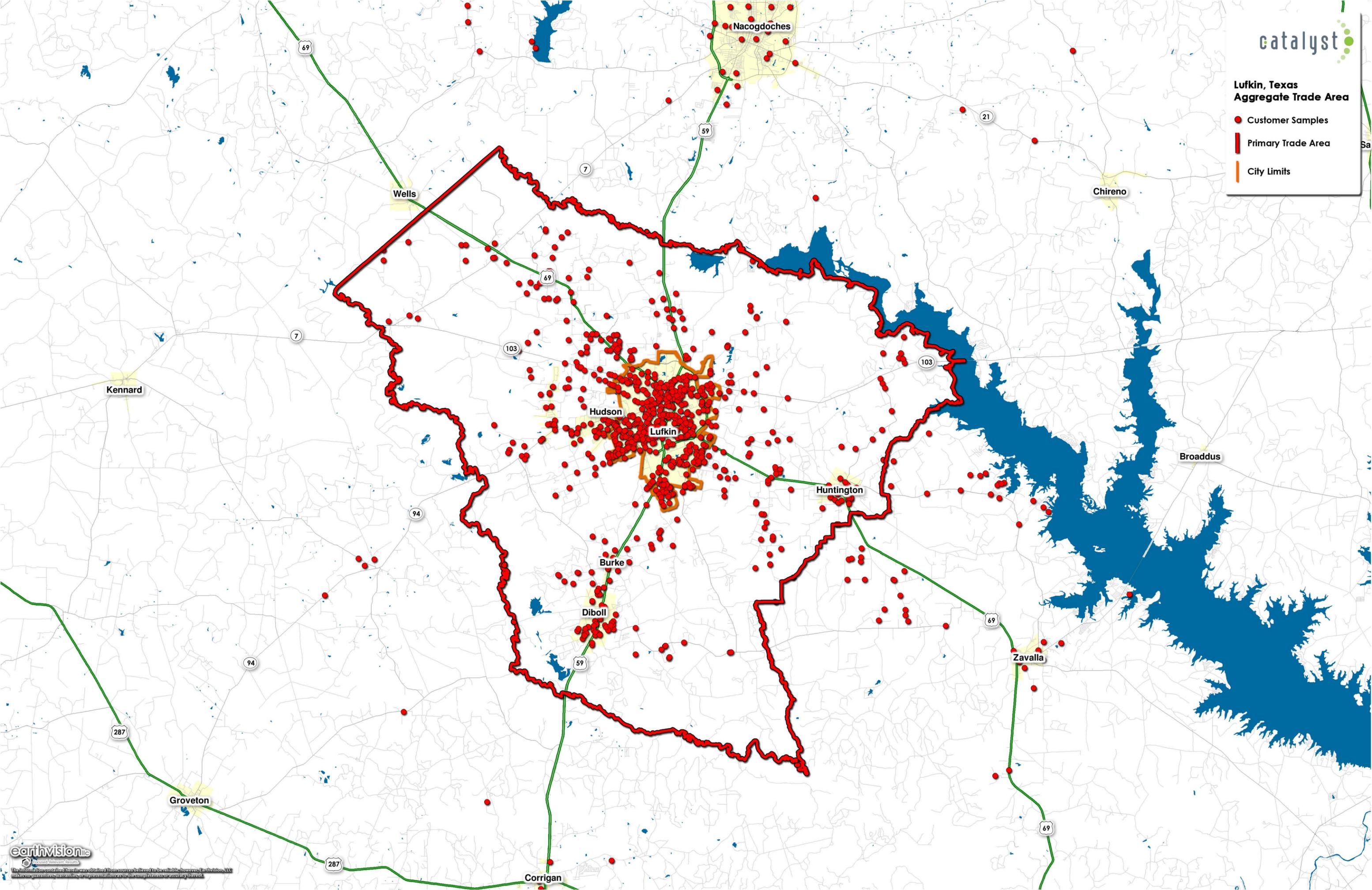
September 2013



catalyst

Lufkin, Texas  
Aggregate Trade Area

- Customer Samples
- ▭ Primary Trade Area
- ▭ City Limits





# City of Lufkin Retail Market Analysis

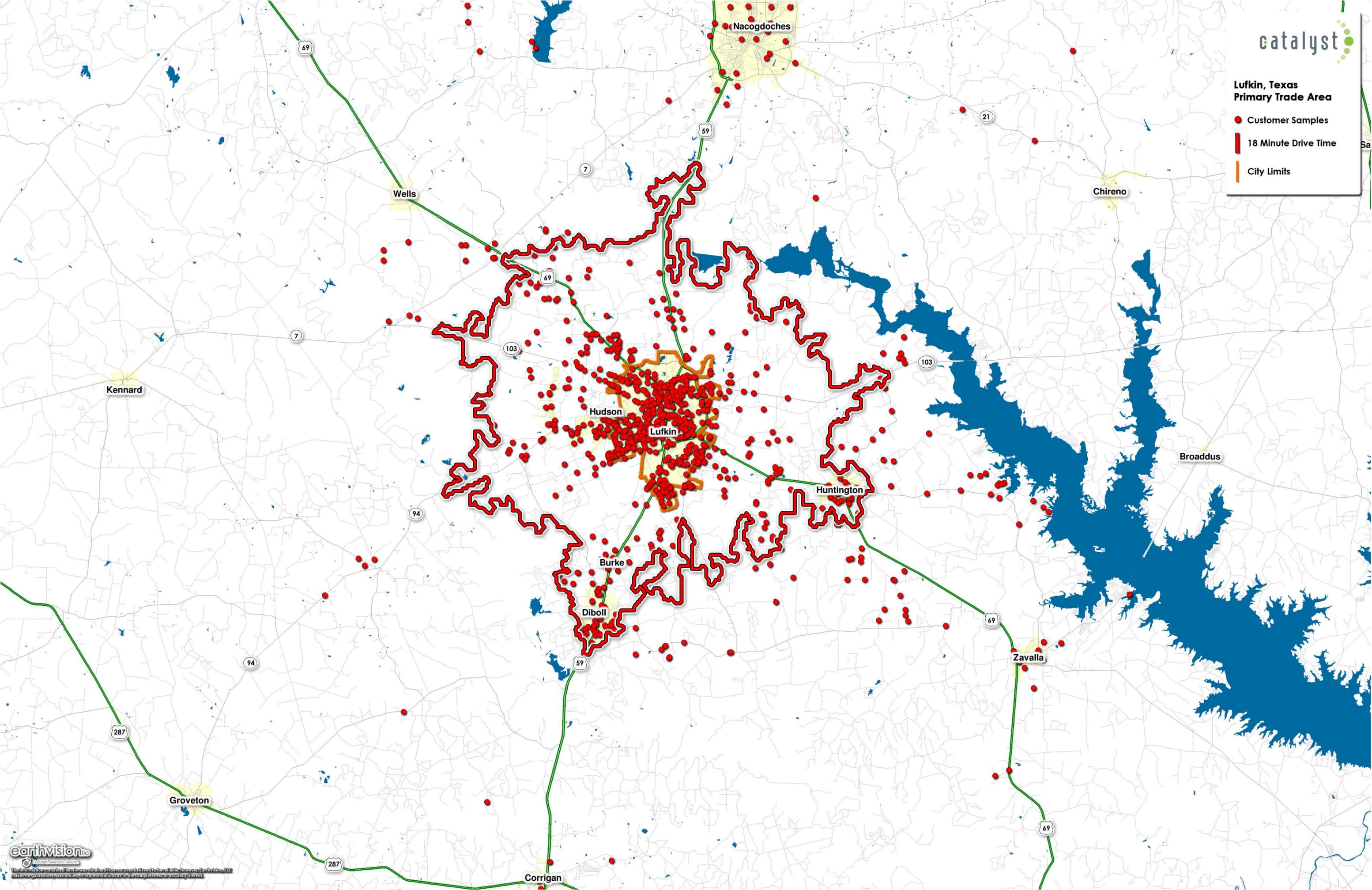
September 2013



catalyst

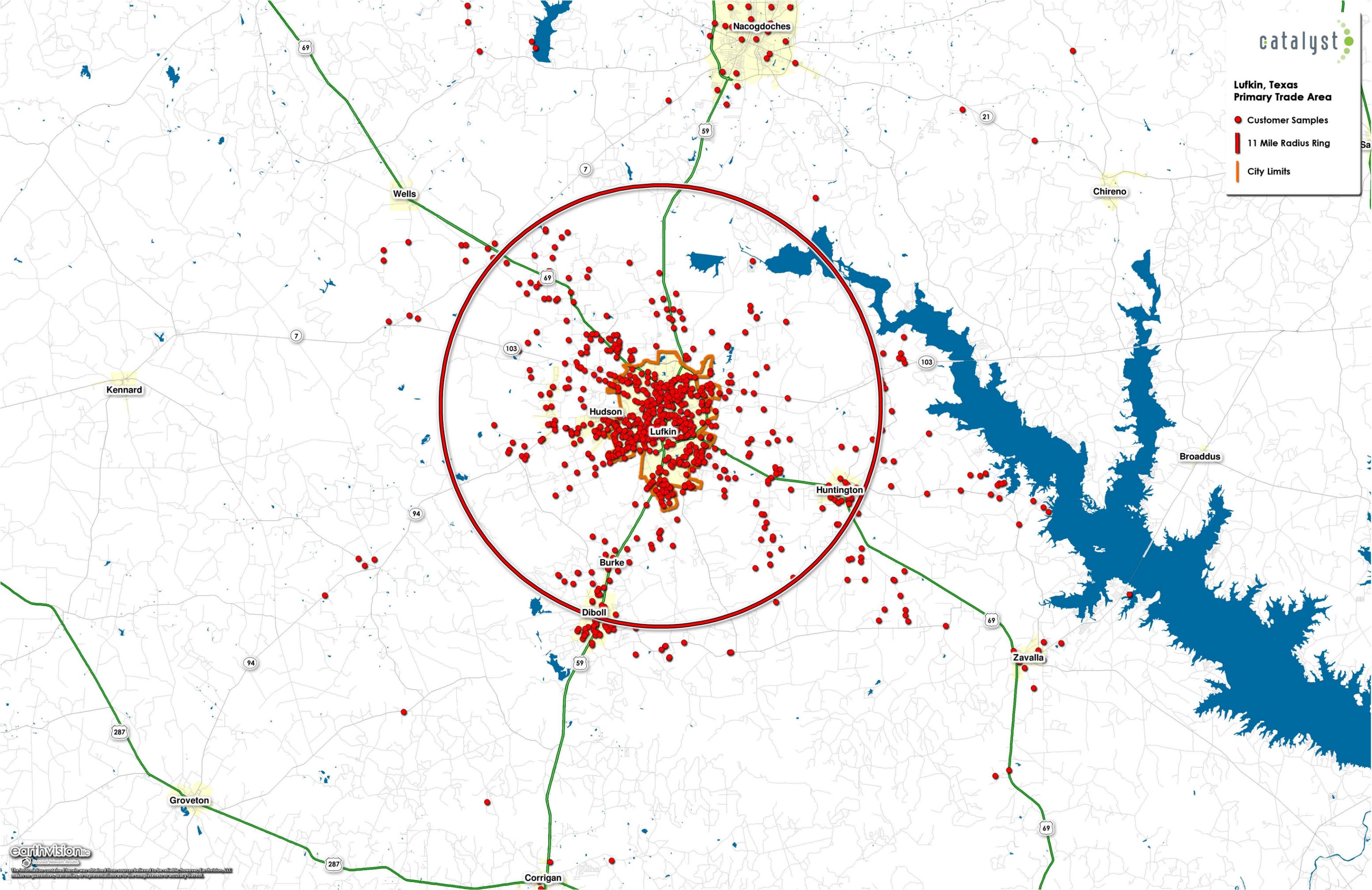
Lufkin, Texas  
Primary Trade Area

- Customer Samples
- ▭ 18 Minute Drive Time
- ▭ City Limits



Lufkin, Texas  
Primary Trade Area

- Customer Samples
- 11 Mile Radius Ring
- ▭ City Limits





# City of Lufkin Retail Market Analysis

September 2013



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# City of Lufkin Retail Market Analysis

September 2013



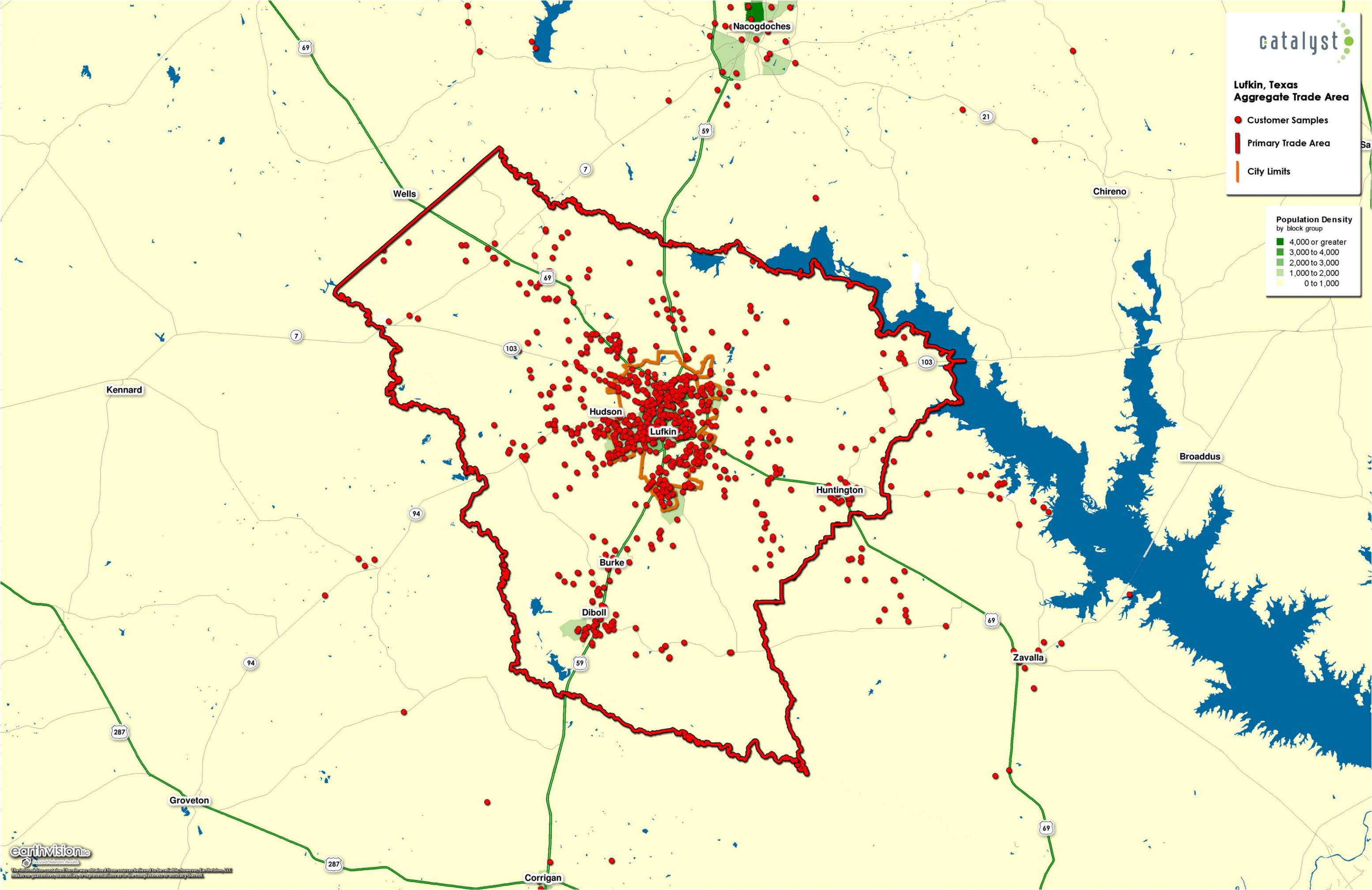
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Lufkin, Texas  
Aggregate Trade Area

- Customer Samples
- ▭ Primary Trade Area
- ▭ City Limits

Population Density  
by block group

- 4,000 or greater
- 3,000 to 4,000
- 2,000 to 3,000
- 1,000 to 2,000
- 0 to 1,000





# City of Lufkin Retail Market Analysis

September 2013



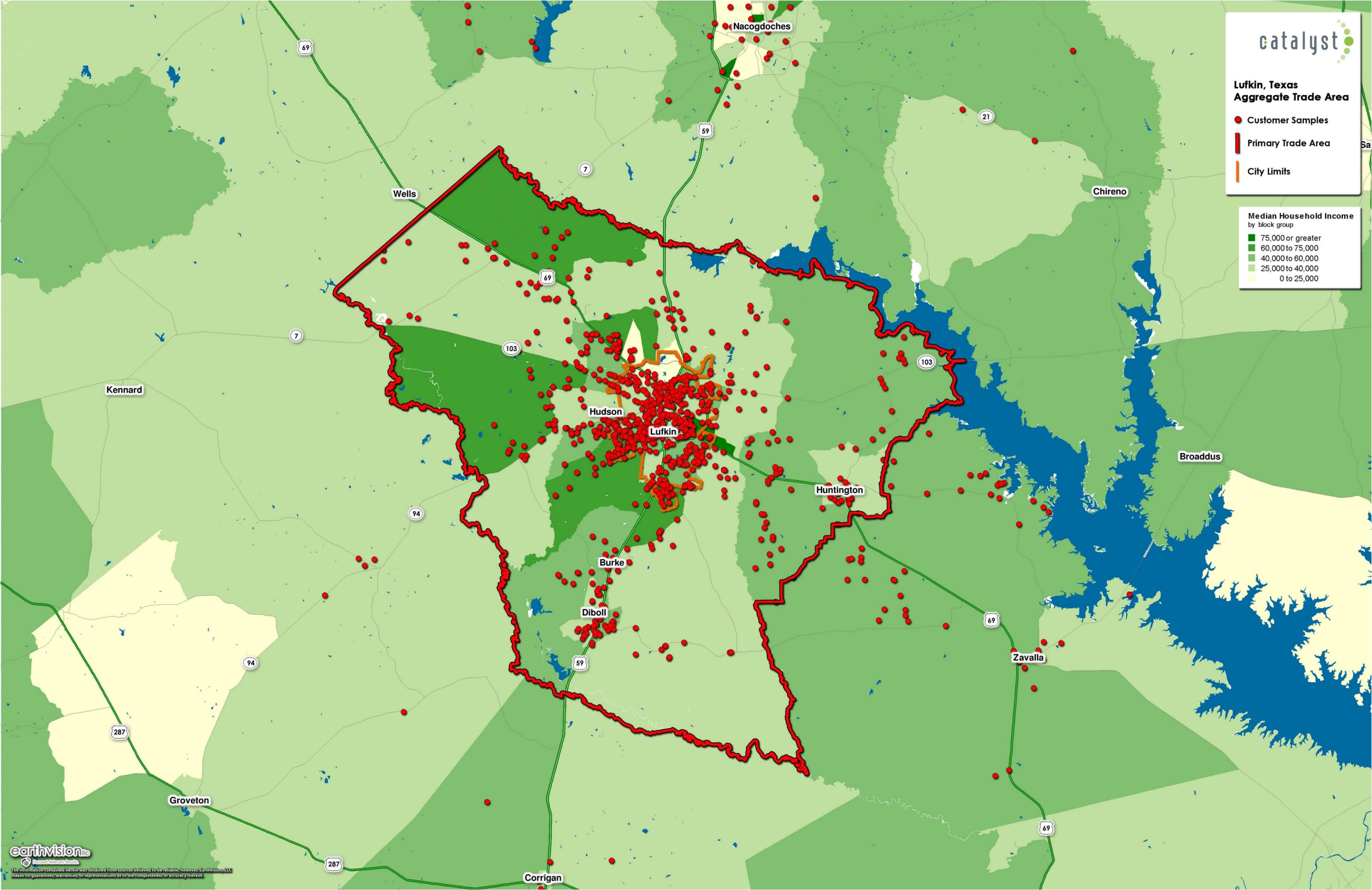
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Lufkin, Texas  
Aggregate Trade Area

- Customer Samples
- ▭ Primary Trade Area
- ▭ City Limits

Median Household Income  
by block group

75,000 or greater
60,000 to 75,000
40,000 to 60,000
25,000 to 40,000
0 to 25,000





# City of Lufkin Retail Market Analysis

September 2013



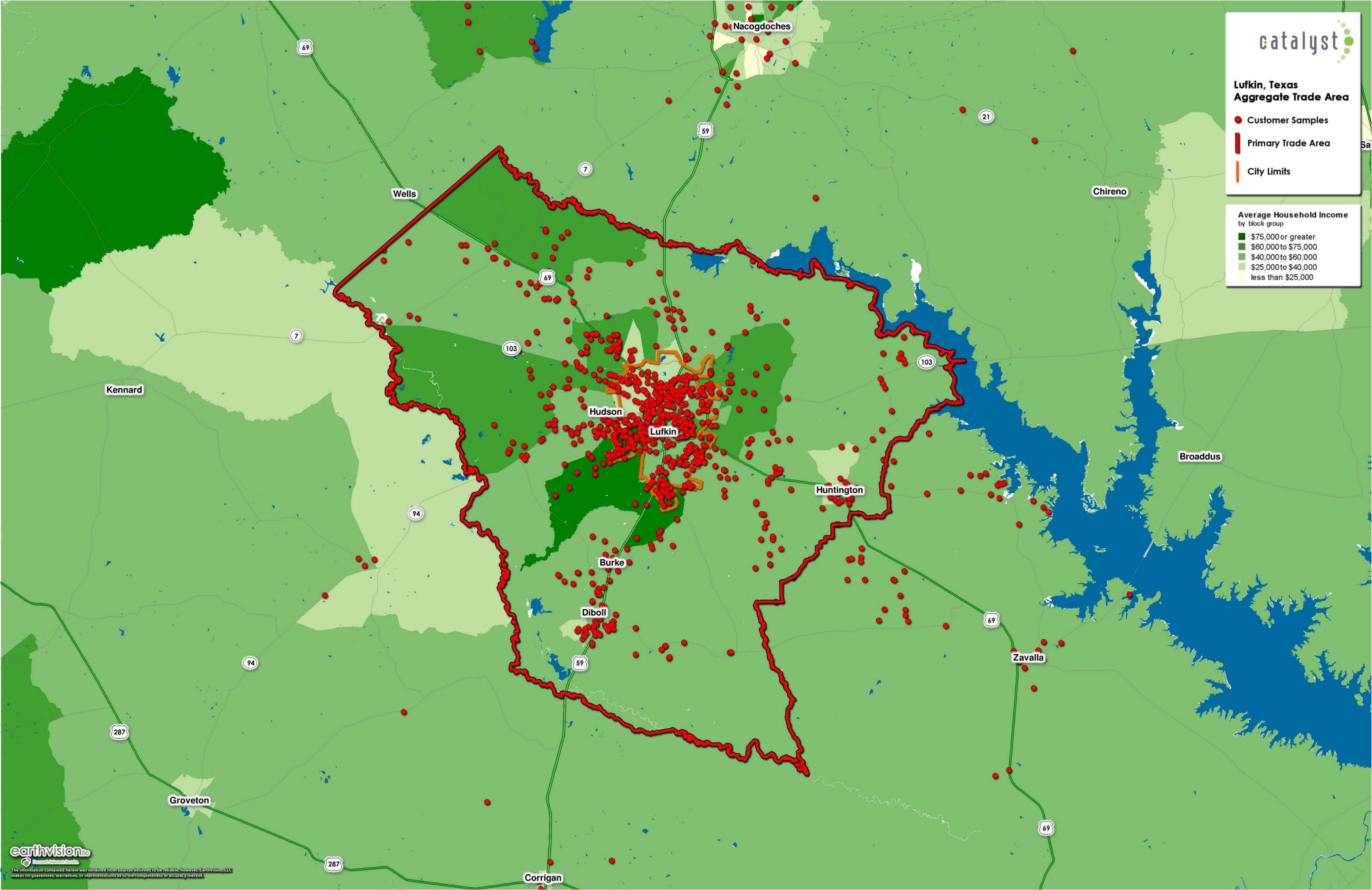
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Lufkin, Texas  
Aggregate Trade Area

- Customer Samples
- ▭ Primary Trade Area
- ▭ City Limits

Average Household Income  
by block group

- \$75,000 or greater
- \$60,000 to \$75,000
- \$40,000 to \$60,000
- \$25,000 to \$40,000
- less than \$25,000





# City of Lufkin Retail Market Analysis

September 2013



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