TheRetailCoach®

RETAIL TRADE AREA RETAIL DEMAND OUTLOOK

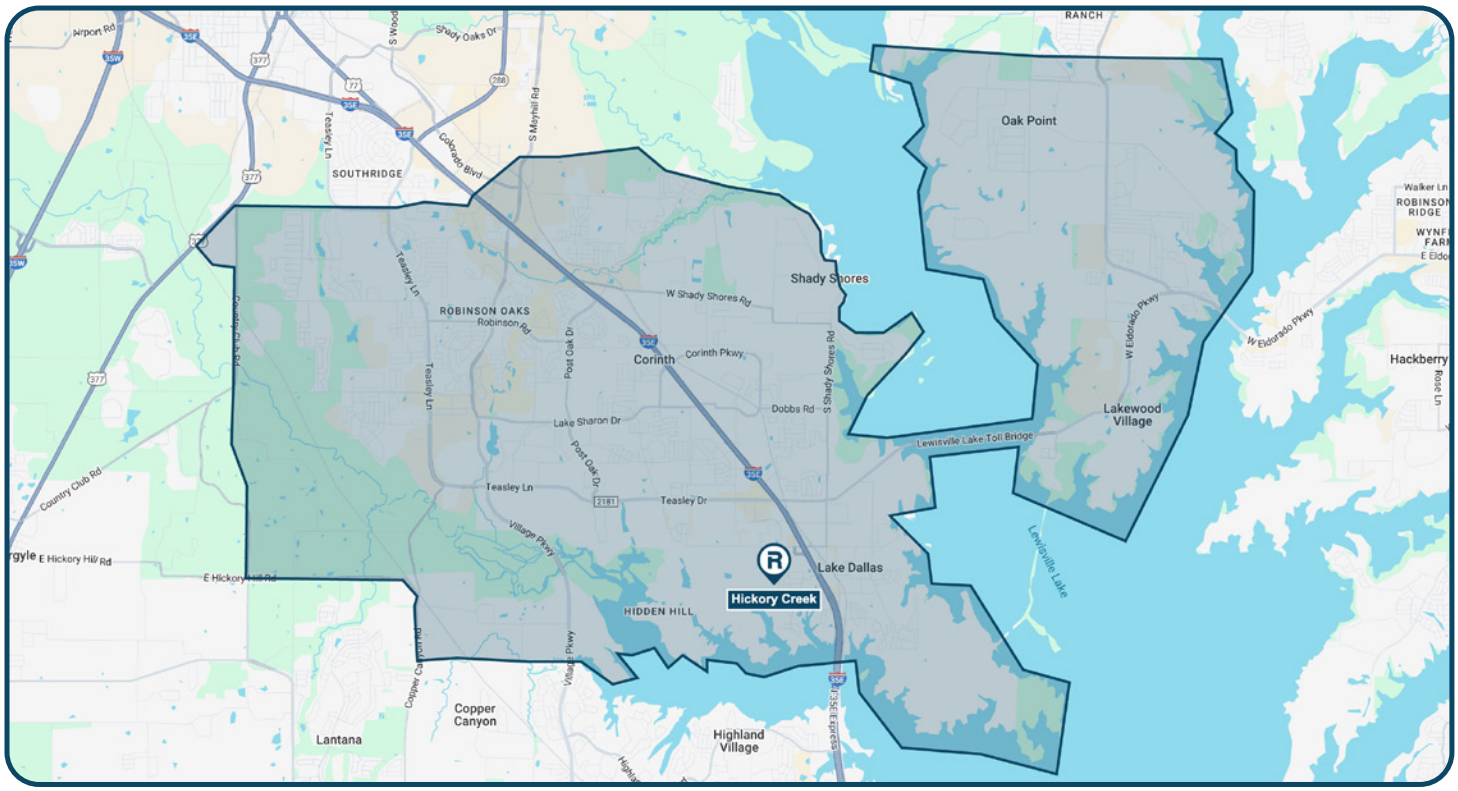
HICKORY CREEK, TEXAS

PREPARED FOR HICKORY CREEK ECONOMIC DEVELOPMENT CORPORATION
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Retail Trade Area — Hickory Creek, Texas

DEMOGRAPHIC SNAPSHOT

John M. Smith
Hickory Creek Economic Development Corporation
Town Manager
940.279.7061
John.Smith@HickoryCreek-TX.gov
www.HickoryCreek-TX.gov



Population

2020	84,056
2026	97,672
2031	107,718

Age

0-9 Years	11.48%
10 - 17 Years	9.95%
18 - 24 Years	8.62%
25 - 34 Years	12.71%
35 - 44 Years	14.64%
45 - 54 Years	14.31%
55 - 64 Years	13.31%
65 and Older	14.97%
Median Age	39.94
Average Age	39.80

Educational Attainment (%)

Graduate or Professional Degree	14.63%
Bachelors Degree	30.09%
Associate Degree	9.08%
Some College	22.52%
High School Graduate (GED)	16.91%
Some High School, No Degree	3.60%
Less than 9th Grade	3.18%

Income

Average HH	$162,760
Median HH	$121,247
Per Capita	$57,773

Race Distribution

White	60.35%
Black/African American	9.38%
American Indian/Alaskan	0.91%
Asian	6.55%
Native Hawaiian/Islander	0.11%
Other Race	8.07%
Two or More Races	14.62%
Hispanic	23.02%
Non-Hispanic	76.98%

RETAIL DEMAND OUTLOOK

NAICS	DESCRIPTION	2026 DEMAND	2031 DEMAND	GROWTH	CAGR (%)*
44, 45, 722	**Total demand for retail trade including food and drink**	**$1,232,889,025**	**$1,515,044,694**	**$282,155,668**	**4.21%**
441	Motor vehicle and parts dealers	$326,823,552	$411,184,311	$84,360,758	4.70%
4411	Automobile dealers	$302,463,713	$380,331,062	$77,867,349	4.69%
4412	Other motor vehicle dealers	$9,010,086	$11,446,828	$2,436,743	4.90%
4413	Automotive parts, accessories, and tire retailers	$15,349,754	$19,406,421	$4,056,667	4.80%
444	Building material and garden equipment and supplies dealers	$33,103,301	$41,280,145	$8,176,844	4.51%
4441	Building material and supplies dealers	$26,533,966	$33,104,991	$6,571,024	4.52%
44411	Home centers	$15,861,389	$19,818,784	$3,957,395	4.56%
44412	Paint and wallpaper retailers	$634,297	$794,607	$160,310	4.61%
44414	Hardware retailers	$4,110,359	$5,117,020	$1,006,661	4.48%
44418	Other building material dealers	$5,927,921	$7,374,580	$1,446,658	4.46%
4442	Lawn and garden equipment and supplies retailers	$6,569,335	$8,175,155	$1,605,820	4.47%
44423	Outdoor power equipment retailers	$1,871,170	$2,341,651	$470,481	4.59%
44424	Nursery, garden center, and farm supply retailers	$4,698,164	$5,833,503	$1,135,339	4.42%
445	Food and beverage retailers	$184,443,748	$226,227,458	$41,783,710	4.17%
4451	Grocery and convenience retailers	$167,124,986	$204,844,804	$37,719,818	4.15%
44511	Supermarkets and other grocery retailers (except convenience retailers)	$158,791,989	$194,624,117	$35,832,127	4.15%
44513	Convenience retailers and vending machine operators	$8,332,996	$10,220,687	$1,887,691	4.17%
4452	Specialty food retailers	$9,615,730	$11,742,092	$2,126,362	4.08%
4453	Beer, wine, and liquor retailers	$7,703,032	$9,640,562	$1,937,530	4.59%
449	Furniture, home furnishings, electronics, and appliance retailers	$64,365,734	$80,000,191	$15,634,457	4.44%
4491	Furniture and home furnishings retailers	$35,376,380	$44,055,850	$8,679,471	4.49%
44911	Furniture retailers	$24,388,534	$30,413,099	$6,024,565	4.51%
44912	Home furnishings retailers	$10,987,845	$13,642,752	$2,654,906	4.42%
4492	Electronics and appliance retailers	$28,989,355	$35,944,341	$6,954,986	4.39%
455	General merchandise retailers	$169,843,717	$206,594,502	$36,750,784	4.00%
4551	Department stores	$8,070,352	$9,285,281	$1,214,929	2.84%
4552	Warehouse clubs, supercenters, and other general merchandise retailers	$161,773,365	$197,309,221	$35,535,856	4.05%
456	Health and personal care retailers	$41,368,149	$49,701,924	$8,333,775	3.74%
45611	Pharmacies and drug retailers	$25,460,897	$29,886,417	$4,425,520	3.26%
45612	Cosmetics, beauty supplies, and perfume retailers	$7,906,782	$9,863,728	$1,956,946	4.52%
45613	Optical goods retailers	$2,393,458	$3,034,276	$640,818	4.86%
45619	Other health and personal care retailers	$5,607,011	$6,917,502	$1,310,491	4.29%

*Compound annual growth rate (CAGR) is the geometric progression ratio that provides a constant rate of return over the time period. CAGR dampens the effect of volatility of periodic growth.

RETAIL DEMAND OUTLOOK

NAICS	DESCRIPTION	2026 DEMAND	2031 DEMAND	GROWTH	CAGR (%)*
457	Gasoline stations and fuel dealers	$126,736,252	$157,308,829	$30,572,577	4.42%
458	Clothing, clothing accessories, shoe, and jewelry retailers	$52,622,387	$59,602,037	$6,979,650	2.52%
4581	Clothing and clothing accessories retailers	$39,265,168	$44,574,952	$5,309,784	2.57%
4582	Shoe retailers	$8,773,880	$10,115,523	$1,341,643	2.89%
4583	Jewelry, luggage, and leather goods retailers	$4,583,339	$4,911,562	$328,223	1.39%
459	Sporting goods, hobby, musical instrument, book, and miscellaneous retailers	$81,673,681	$98,023,951	$16,350,270	3.72%
4591	Sporting goods, hobby, and musical instrument retailers	$53,016,280	$63,572,370	$10,556,091	3.70%
45911	Sporting goods retailers	$10,324,739	$12,482,467	$2,157,728	3.87%
45912	Hobby, toy, and game retailers	$2,026,743	$2,454,314	$427,571	3.90%
45913	Sewing, needlework, and piece goods retailers	$28,657,401	$34,451,580	$5,794,180	3.75%
45914	Musical instrument and supplies retailers	$12,007,398	$14,184,010	$2,176,612	3.39%
4592	Book retailers and news dealers	$1,451,058	$1,317,222	-$133,836	-1.92%
4593	Florists	$2,788,300	$3,499,426	$711,126	4.65%
4594	Office supplies, stationery, and gift retailers	$7,560,775	$9,119,313	$1,558,539	3.82%
4595	Used merchandise retailers	$207,265	$248,048	$40,783	3.66%
4599	Other miscellaneous retailers	$16,650,003	$20,267,571	$3,617,568	4.01%
45991	Pet and pet supplies retailers	$7,512,886	$9,336,332	$1,823,446	4.44%
45993	Manufactured (mobile) home dealers	$308,926	$393,327	$84,402	4.95%
45999	All other miscellaneous retailers and art dealers	$8,828,192	$10,537,912	$1,709,720	3.60%
722	Food services and drinking places	$151,908,504	$185,121,345	$33,212,841	4.03%
7223	Special food services	$5,156,959	$6,346,774	$1,189,815	4.24%
7224	Drinking places (alcoholic beverages)	$3,732,325	$4,605,166	$872,840	4.29%
7225	Restaurants and other eating places	$143,019,219	$174,169,406	$31,150,186	4.02%
722511	Full-service restaurants	$63,491,842	$77,399,180	$13,907,338	4.04%
722513	Limited-service restaurants	$66,689,178	$81,146,590	$14,457,412	4.00%
722514	Cafeterias, grill buffets, and buffets	$1,057,932	$1,287,071	$229,139	4.00%
722515	Snack and nonalcoholic beverage bars	$11,780,267	$14,336,565	$2,556,298	4.01%

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About The Retail Coach®

The Retail Coach is a national retail recruitment and development firm that combines strategy, technology, and creative expertise to develop and deliver high-impact retail recruitment and development plans to local governments, chambers of commerce, economic development organizations and private developers.

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

Retail:360® Process

Providing more than simple data reports of psychographic and demographic trends, The Retail Coach goes well beyond other retail consulting and market research firms' offerings by combining current national and statewide demographics and trend data with real-world, "on-the-ground" information gathered through extensive visits to our clients' communities. Every community is different, and there is no "one size fits all" retail recruitment solution. Compiling the gathered data into client-tailored information packets that are uniquely designed for, and targeted to, specific retailers and restaurants who meet the community's needs help assure our clients that they are receiving the latest and best information for targeted retail recruitment efforts — all with personal service and coaching guidance that continues beyond the initial project scope and timeline.

Our Retail:360® Process assures that communities get timely, accurate and relevant information. Translating that data into the information that retailers need and seek assures our clients even better possibilities for tremendous retail growth and success.

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ACKNOWLEDGMENTS

The observations, conclusions and recommendations contained in this study are solely those of The Retail Coach, LLC and should not be construed to represent the opinions of others, including its clients, or any other entity prior to such entity's express approval of this study.

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Sources used in completing this study include: infoUSA™, Applied Geographic Solutions, Claritas, ESRI, U.S. Census Bureau, Economy.com, Unacast, Spatial Insights Inc., Urban Land Institute, CensusViewer.com, International Council of Shopping Centers, and/or U.S. Bureau of Labor and Statistics. To better represent current data, where applicable, portions of estimated actual sales may be calculated using an average sales per square foot model. Mapping data is provided by Google, Nielsen, ESRI and/or Microsoft Corporation.

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