BRADY
THE CITY OF
TEXAS

BRADY ECONOMIC DEVELOPMENT CORPORATION
SPECIAL CALLED MEETING AGENDA
AUGUST 6, 2015 AT 12:00 PM

NOTICE is hereby given of a meeting of the Brady Economic Development Corporation, City of Brady, McCulloch County, State of Texas, to be held at 12:00pm on August 6, 2015, at the City of Brady Service Center located at 1405 North Bridge Street, Brady, Texas, for the purpose of considering the following items. The Brady Economic Development Corporation, reserves the right to meet in closed session on any of the items listed below should the need arise and if applicable pursuant to authorization by Title 5, Chapter 551, of the Texas Government Code.

1. CALL TO ORDER, ROLL CALL & CERTIFICATION OF A QUORUM

2. APPROVAL OF MINUTES – 7-28-2015

3. PRESENTATION ITEMS

A. The Retail Coach – Retail Trade Area, Demographics and Gap Analysis

4. INDIVIDUAL CONSIDERATION

A. Discuss and consider Economic Incentives Package for Cement Business

5. Executive Session, if needed.

The BEDC reserves the right to adjourn into Executive Session at any time during the course of this meeting to discuss any of the matters listed on this agenda as authorized by the Texas Government Code Sections 551.071 (Consultation with Attorney), 551.072 (Deliberations about Real Property), 551.073 (Deliberations about Gifts and Donations), and 551.087 (Economic Development). Additionally, the following items are anticipated for Executive Session:

A. Pursuant to 551.072 (Deliberations about Real Property)

B. Pursuant to Section 551.087 (Economic Development)
   a. Discussion of potential economic development projects

6. Open Session Action on Any Executive Session Item listed above, if needed.

7. ADJOURNMENT

I certify that this is a true and correct copy of the City of Brady City EDC Meeting Agenda and that this notice as posted on the designated bulletin board at Brady City Hall, 201 E. Main St., Brady, Texas 76825; a place convenient and readily accessible to the public at all times, and said notice was posted on Friday, July 31, 2015 by 5:00 p.m. and will remain posted continuously for 72 hours prior to the scheduled meeting pursuant to Chapter 551 of the Texas Government Code.

TKeys

Tina Keys, City Secretary

In compliance with the American with Disabilities Act, the City of Brady will provide for reasonable accommodations for persons attending public meetings at City Facilities. Requests for accommodations or interpretive services must be received at least 48 hours prior to the meeting. Please contact the City Secretary at 325-597-2152 or citysec@bradytx.us.

Brady Economic Development Corporation
City of Brady, Texas
Agenda Action Form

AGENDA DATE:	08-06-2015	**AGENDA ITEM**	3A
AGENDA SUBJECT:	Retail Coach Market Study Presentation		
PREPARED BY:	Peter Lamont	**Date Submitted:**	07-31-2015
EXHIBITS:	Retail Coach Report		
BUDGETARY IMPACT:	**Required Expenditure:**	$00.00	
	Amount Budgeted:	$00.00	
	Appropriation Required:	$00.00	
CITY MANAGER APPROVAL:			

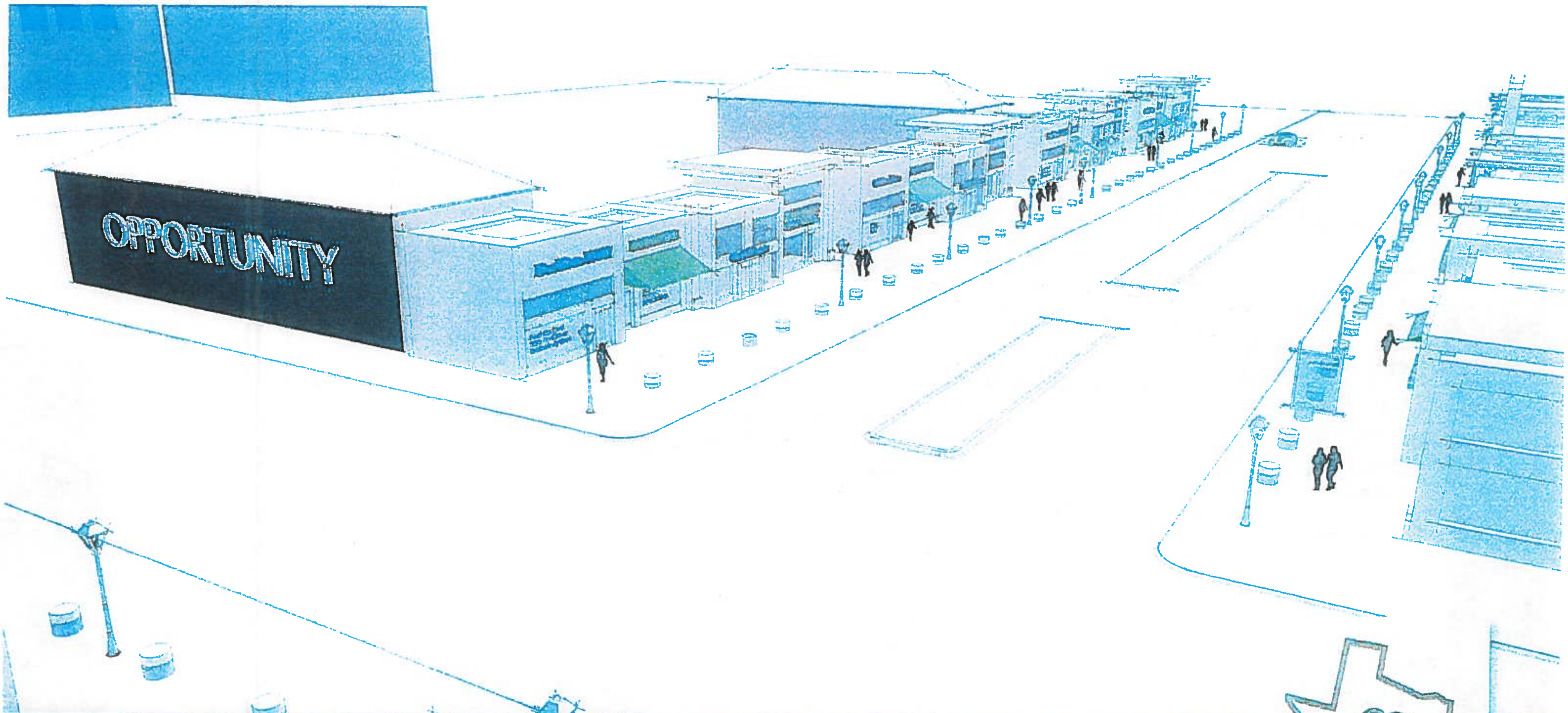
SUMMARY:

At the regular meeting on February 9, 2015, the EDC authorized staff to seek and enter into an agreement for a local market economic study. On May 26^{th}, staff entered into an agreement with The Retail Coach to determine the Primary and secondary retail trade areas as well as complete a Gap Analysis and demographics study.

The Retail Coach has completed their analysis and has submitted their report for review and consideration.

RECOMMENDED ACTION:

Receive the report and provide comments.



COMMUNITY DEMOGRAPHIC PROFILE

Brady, Texas

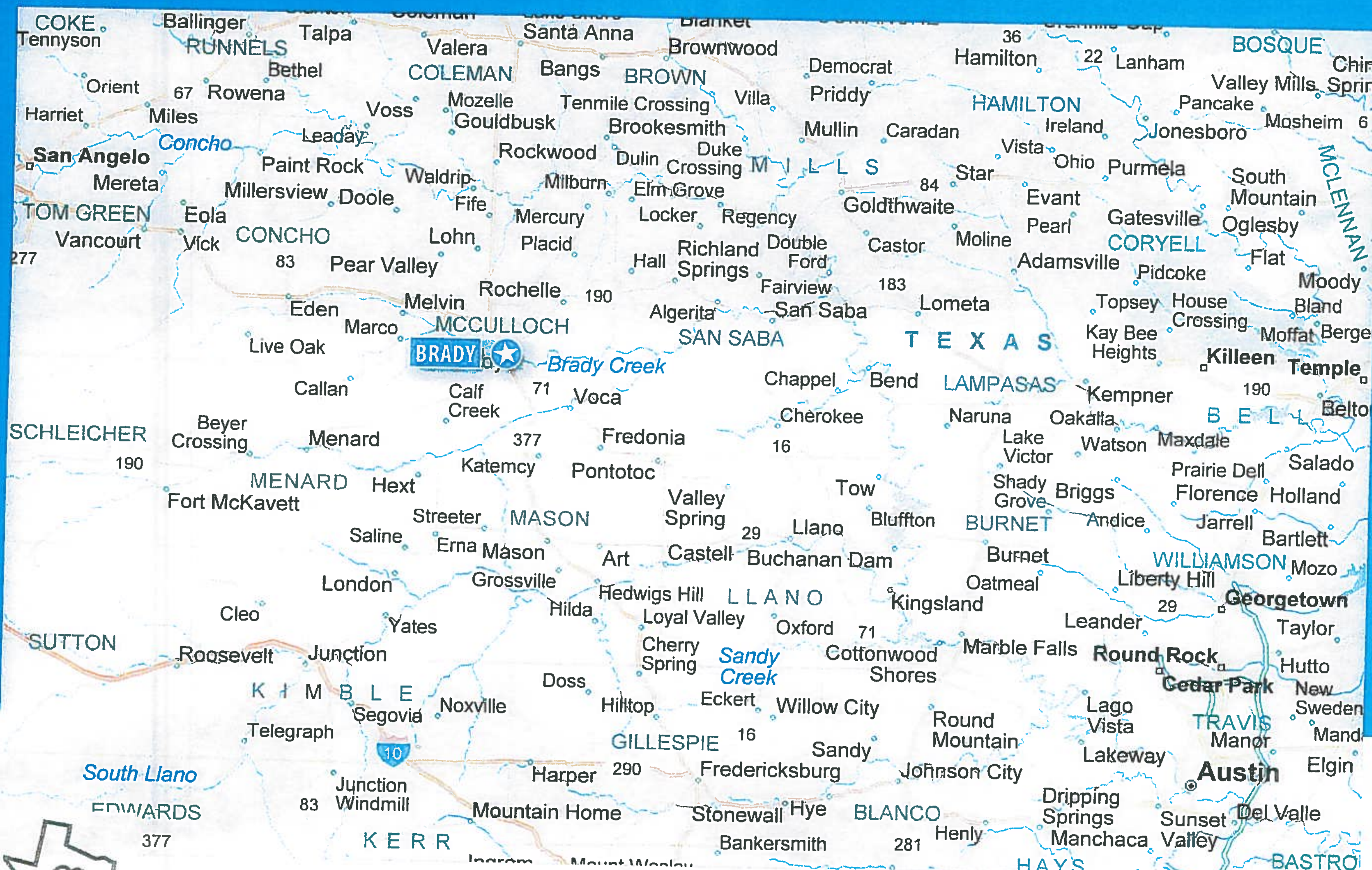
BRADY
THE TRUE HEART OF
TEXAS

Prepared for
City of Brady
June 2015

TheRetailCoach®

Location Map

Brady, Texas



Contact Information

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BRADY
THE TRUE HEART OF
TEXAS

Community Demographics
Brady, Texas

DESCRIPTION	DATA	%
Population		
2020 Projection	5,710	
2015 Estimate	5,568	
2010 Census	5,528	
Growth 2015-2020	2.55%	
Growth 2010-2015	0.72%	
2015 Est. Population by Single-Classification Race	5,568	
White Alone	4,379	78.65
Black or African American Alone	222	3.99
Amer. Indian and Alaska Native Alone	47	0.84
Asian Alone	50	0.90
Native Hawaiian and Other Pac. Isl. Alone	4	0.07
Some Other Race Alone	718	12.90
Two or More Races	148	2.66
2015 Est. Population by Hispanic or Latino Origin	5,568	
Not Hispanic or Latino	3,501	62.88
Hispanic or Latino:	2,067	37.12
Mexican	1,762	85.24
Puerto Rican	0	0.00
Cuban	2	0.10
All Other Hispanic or Latino	303	14.66

DESCRIPTION	DATA	%
2015 Est. Hisp. or Latino Pop by Single-Class. Race	2,067	
White Alone	1,210	58.54
Black or African American Alone	24	1.16
American Indian and Alaska Native Alone	24	1.16
Asian Alone	1	0.05
Native Hawaiian and Other Pacific Islander Alone	0	0.00
Some Other Race Alone	713	34.49
Two or More Races	95	4.60
2015 Est. Pop by Race, Asian Alone, by Category	50	
Chinese, except Taiwanese	0	0.00
Filipino	0	0.00
Japanese	0	0.00
Asian Indian	12	24.00
Korean	0	0.00
Vietnamese	0	0.00
Cambodian	0	0.00
Hmong	0	0.00
Laotian	0	0.00
Thai	0	0.00
All Other Asian Races Including 2+ Category	38	76.00
2015 Est. Population by Ancestry	5,568	
Arab	0	0.00
Czech	5	0.09
Danish	0	0.00
Dutch	66	1.19
English	299	5.37
French (except Basque)	48	0.86
French Canadian	0	0.00
German	409	7.35
Greek	0	0.00

Community Demographics
Brady, Texas

DESCRIPTION	DATA	%
Hungarian	0	0.00
Irish	264	4.74
Italian	95	1.71
Lithuanian	0	0.00
United States or American	1,184	21.26
Norwegian	27	0.48
Polish	0	0.00
Portuguese	0	0.00
Russian	0	0.00
Scottish	23	0.41
Scotch-Irish	126	2.26
Slovak	0	0.00
Subsaharan African	0	0.00
Swedish	82	1.47
Swiss	32	0.57
Ukrainian	0	0.00
Welsh	0	0.00
West Indian (except Hisp. groups)	0	0.00
Other ancestries	2,253	40.46
Ancestry Unclassified	655	11.76
2015 Est. Pop Age 5+ by Language Spoken at Home	5,166	
Speak Only English at Home	3,989	77.22
Speak Asian/Pac. Isl. Lang. at Home	35	0.68
Speak IndoEuropean Language at Home	2	0.04
Speak Spanish at Home	1,140	22.07
Speak Other Language at Home	0	0.00
2015 Est. Population by Sex	5,568	
Male	2,722	48.89
Female	2,846	51.11

DESCRIPTION	DATA	%
2015 Est. Population by Age	5,568	
Age 0 - 4	402	7.22
Age 5 - 9	403	7.24
Age 10 - 14	391	7.02
Age 15 - 17	226	4.06
Age 18 - 20	199	3.57
Age 21 - 24	246	4.42
Age 25 - 34	619	11.12
Age 35 - 44	597	10.72
Age 45 - 54	655	11.76
Age 55 - 64	695	12.48
Age 65 - 74	593	10.65
Age 75 - 84	370	6.65
Age 85 and over	172	3.09
Age 16 and over	4,299	77.21
Age 18 and over	4,146	74.46
Age 21 and over	3,947	70.89
Age 65 and over	1,135	20.38
2015 Est. Median Age	40.0	
2015 Est. Average Age	40.4	

Community Demographics
Brady, Texas

DESCRIPTION	DATA	%
2015 Est. Male Population by Age	2,722	
Age 0 - 4	209	7.68
Age 5 - 9	213	7.83
Age 10 - 14	202	7.42
Age 15 - 17	123	4.52
Age 18 - 20	107	3.93
Age 21 - 24	126	4.63
Age 25 - 34	309	11.35
Age 35 - 44	298	10.95
Age 45 - 54	320	11.76
Age 55 - 64	331	12.16
Age 65 - 74	274	10.07
Age 75 - 84	155	5.69
Age 85 and over	55	2.02
2015 Est. Median Age, Male	37.4	
2015 Est. Average Age, Male	38.6	
2015 Est. Female Population by Age	2,846	
Age 0 - 4	193	6.78
Age 5 - 9	190	6.68
Age 10 - 14	189	6.64
Age 15 - 17	103	3.62
Age 18 - 20	92	3.23
Age 21 - 24	120	4.22
Age 25 - 34	310	10.89
Age 35 - 44	299	10.51
Age 45 - 54	335	11.77
Age 55 - 64	364	12.79
Age 65 - 74	319	11.21
Age 75 - 84	215	7.55
Age 85 and over	117	4.11

DESCRIPTION	DATA	%
2015 Est. Median Age, Female	42.6	
2015 Est. Average Age, Female	42.2	
2015 Est. Pop Age 15+ by Marital Status	4,372	
Total, Never Married	983	22.48
Males, Never Married	614	14.04
Females, Never Married	369	8.44
Married, Spouse present	2,147	49.11
Married, Spouse absent	148	3.39
Widowed	584	13.36
Males Widowed	82	1.88
Females Widowed	502	11.48
Divorced	510	11.67
Males Divorced	247	5.65
Females Divorced	263	6.02
2015 Est. Pop Age 25+ by Edu. Attainment	3,701	
Less than 9th grade	452	12.21
Some High School, no diploma	258	6.97
High School Graduate (or GED)	1,405	37.96
Some College, no degree	678	18.32
Associate Degree	246	6.65
Bachelor's Degree	423	11.43
Master's Degree	160	4.32
Professional School Degree	35	0.95
Doctorate Degree	44	1.19
2015 Est. Pop Age 25+ by Edu. Attain., Hisp./Lat.	1,164	
No High School Diploma	471	40.46
High School Graduate	467	40.12
Some College or Associate's Degree	197	16.92
Bachelor's Degree or Higher	29	2.49

Community Demographics
Brady, Texas

DESCRIPTION	DATA	%
Households		
2020 Projection	2,277	
2015 Estimate	2,217	
2010 Census	2,192	
Growth 2015-2020	2.71%	
Growth 2010-2015	1.14%	
2015 Est. Households by Household Type	2,217	
Family Households	1,462	65.94
Nonfamily Households	755	34.06
2015 Est. Group Quarters Population	104	
2015 HHs by Ethnicity, Hispanic/Latino	682	30.76
2015 Est. Households by HH Income	2,217	
Income < $15,000	271	12.22
Income $15,000 - $24,999	443	19.98
Income $25,000 - $34,999	371	16.73
Income $35,000 - $49,999	414	18.67
Income $50,000 - $74,999	224	10.10
Income $75,000 - $99,999	192	8.66
Income $100,000 - $124,999	149	6.72
Income $125,000 - $149,999	61	2.75
Income $150,000 - $199,999	17	0.77
Income $200,000 - $249,999	8	0.36
Income $250,000 - $499,999	26	1.17
Income $500,000+	41	1.85

DESCRIPTION	DATA	%
2015 Est. Average Household Income	$58,726	
2015 Est. Median Household Income	$35,851	
2015 Median HH Inc. by Single-Class. Race or Eth.		
White Alone	38,477	
Black or African American Alone	37,222	
American Indian and Alaska Native Alone	34,091	
Asian Alone	100,000	
Native Hawaiian and Other Pacific Islander Alone	62,500	
Some Other Race Alone	22,760	
Two or More Races	25,000	
Hispanic or Latino	30,342	
Not Hispanic or Latino	37,934	
2015 Est. Family HH Type by Presence of Own Child.	1,462	
Married-Couple Family, own children	366	25.03
Married-Couple Family, no own children	691	47.26
Male Householder, own children	82	5.61
Male Householder, no own children	54	3.69
Female Householder, own children	163	11.15
Female Householder, no own children	106	7.25
2015 Est. Households by Household Size	2,217	
1-person	676	30.49
2-person	725	32.70
3-person	330	14.88
4-person	243	10.96
5-person	139	6.27
6-person	64	2.89
7-or-more-person	40	1.80

Community Demographics
Brady, Texas

DESCRIPTION	DATA	%
2015 Est. Average Household Size	2.46	
2015 Est. Households by Presence of People Under 18	2,217	
Households with 1 or More People under Age 18:	717	32.34
Married-Couple Family	418	58.30
Other Family, Male Householder	94	13.11
Other Family, Female Householder	193	26.92
Nonfamily, Male Householder	10	1.39
Nonfamily, Female Householder	2	0.28
Households with No People under Age 18:	1,500	67.66
Married-Couple Family	638	42.53
Other Family, Male Householder	43	2.87
Other Family, Female Householder	75	5.00
Nonfamily, Male Householder	322	21.47
Nonfamily, Female Householder	422	28.13
2015 Est. Households by Number of Vehicles	2,217	
No Vehicles	134	6.04
1 Vehicle	822	37.08
2 Vehicles	886	39.96
3 Vehicles	301	13.58
4 Vehicles	30	1.35
5 or more Vehicles	44	1.98
2015 Est. Average Number of Vehicles	1.8	

DESCRIPTION	DATA	%
Family Households		
2020 Projection	1,502	
2015 Estimate	1,462	
2010 Census	1,445	
Growth 2015-2020	2.74%	
Growth 2010-2015	1.18%	
2015 Est. Families by Poverty Status	1,462	
2015 Families at or Above Poverty	1,196	81.81
2015 Families at or Above Poverty with Children	472	32.28
2015 Families Below Poverty	266	18.19
2015 Families Below Poverty with Children	209	14.30
2015 Est. Pop Age 16+ by Employment Status	4,299	
In Armed Forces	0	0.00
Civilian - Employed	2,392	55.64
Civilian - Unemployed	86	2.00
Not in Labor Force	1,821	42.36
2015 Est. Civ. Employed Pop 16+ by Class of Worker	2,416	
For-Profit Private Workers	1,387	57.41
Non-Profit Private Workers	115	4.76
Local Government Workers	396	16.39
State Government Workers	12	0.50
Federal Government Workers	13	0.54
Self-Employed Workers	483	19.99
Unpaid Family Workers	10	0.41

Community Demographics
Brady, Texas

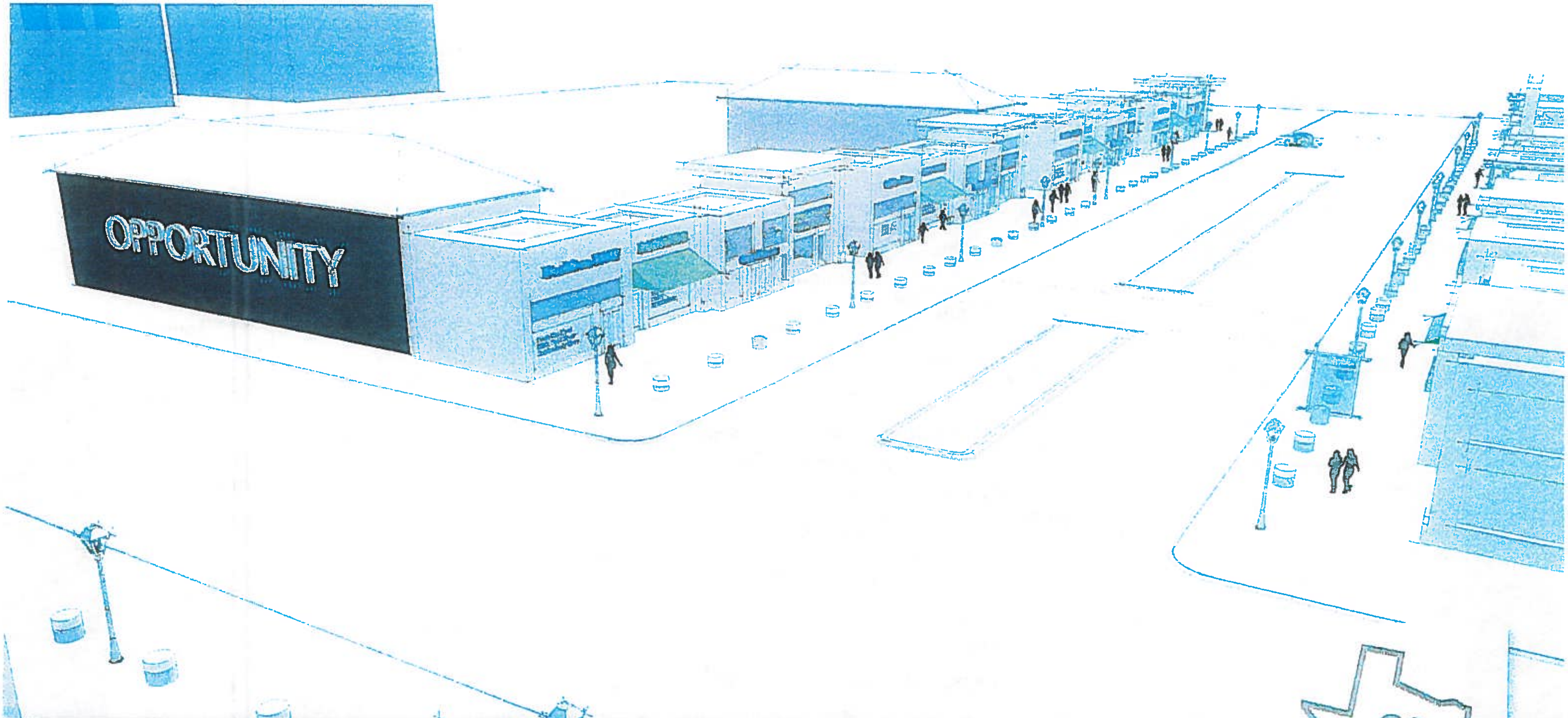
DESCRIPTION	DATA	%
2015 Est. Civ. Employed Pop 16+ by Occupation	2,416	
Architect/Engineer	11	0.46
Arts/Entertainment/Sports	1	0.04
Building Grounds Maintenance	78	3.23
Business/Financial Operations	48	1.99
Community/Social Services	24	0.99
Computer/Mathematical	43	1.78
Construction/Extraction	230	9.52
Education/Training/Library	221	9.15
Farming/Fishing/Forestry	67	2.77
Food Prep/Serving	258	10.68
Health Practitioner/Technician	108	4.47
Healthcare Support	56	2.32
Maintenance Repair	87	3.60
Legal	0	0.00
Life/Physical/Social Science	41	1.70
Management	96	3.97
Office/Admin. Support	277	11.47
Production	140	5.79
Protective Services	46	1.90
Sales/Related	264	10.93
Personal Care/Service	54	2.24
Transportation/Moving	266	11.01
2015 Est. Pop 16+ by Occupation Classification	2,416	
Blue Collar	723	29.93
White Collar	1,134	46.94
Service and Farm	559	23.14

DESCRIPTION	DATA	%
2015 Est. Workers Age 16+ by Transp. to Work	2,403	
Drove Alone	1,936	80.57
Car Pooled	286	11.90
Public Transportation	0	0.00
Walked	58	2.41
Bicycle	0	0.00
Other Means	50	2.08
Worked at Home	73	3.04
2015 Est. Workers Age 16+ by Travel Time to Work *		
Less than 15 Minutes	1,627	
15 - 29 Minutes	379	
30 - 44 Minutes	155	
45 - 59 Minutes	18	
60 or more Minutes	150	
2015 Est. Avg. Travel Time to Work in Minutes	16.93	
2015 Est. Occupied Housing Units by Tenure	2,217	
Owner Occupied	1,505	67.88
Renter Occupied	712	32.12
2015 Owner Occ. HUs: Avg. Length of Residence	16.5	
2015 Renter Occ. HUs: Avg. Length of Residence	8.4	

Community Demographics
Brady, Texas

DESCRIPTION	DATA	%
2015 Est. Owner-Occupied Housing Units by Value	1,505	
Value Less than $20,000	150	9.97
Value $20,000 - $39,999	208	13.82
Value $40,000 - $59,999	219	14.55
Value $60,000 - $79,999	224	14.88
Value $80,000 - $99,999	125	8.31
Value $100,000 - $149,999	213	14.15
Value $150,000 - $199,999	194	12.89
Value $200,000 - $299,999	83	5.51
Value $300,000 - $399,999	15	1.00
Value $400,000 - $499,999	29	1.93
Value $500,000 - $749,999	34	2.26
Value $750,000 - $999,999	10	0.66
Value $1,000,000 or more	1	0.07
2015 Est. Median All Owner-Occupied Housing Value	$75,670	
2015 Est. Housing Units by Units in Structure	2,678	
1 Unit Attached	22	0.82
1 Unit Detached	2,241	83.68
2 Units	210	7.84
3 or 4 Units	28	1.05
5 to 19 Units	50	1.87
20 to 49 Units	19	0.71
50 or More Units	0	0.00
Mobile Home or Trailer	108	4.03
Boat, RV, Van, etc.	0	0.00

DESCRIPTION	DATA	%
2015 Est. Housing Units by Year Structure Built	2,678	
Housing Units Built 2010 or later	43	1.61
Housing Units Built 2000 to 2009	219	8.18
Housing Units Built 1990 to 1999	248	9.26
Housing Units Built 1980 to 1989	224	8.36
Housing Units Built 1970 to 1979	400	14.94
Housing Units Built 1960 to 1969	528	19.72
Housing Units Built 1950 to 1959	441	16.47
Housing Units Built 1940 to 1949	238	8.89
Housing Unit Built 1939 or Earlier	337	12.58
2015 Est. Median Year Structure Built**	1966	



Brady
The True Heart of
Texas

LICENSE PLATE SURVEY
Brady, Texas

Prepared for
City of Brady
June 2015

TheRetailCoach®

License Plate Survey | State View

Brady, Texas

Contact Information

Peter Lamont, Director of Community Services
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BRADY
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License Plate Survey | Concentration View

Brady, Texas

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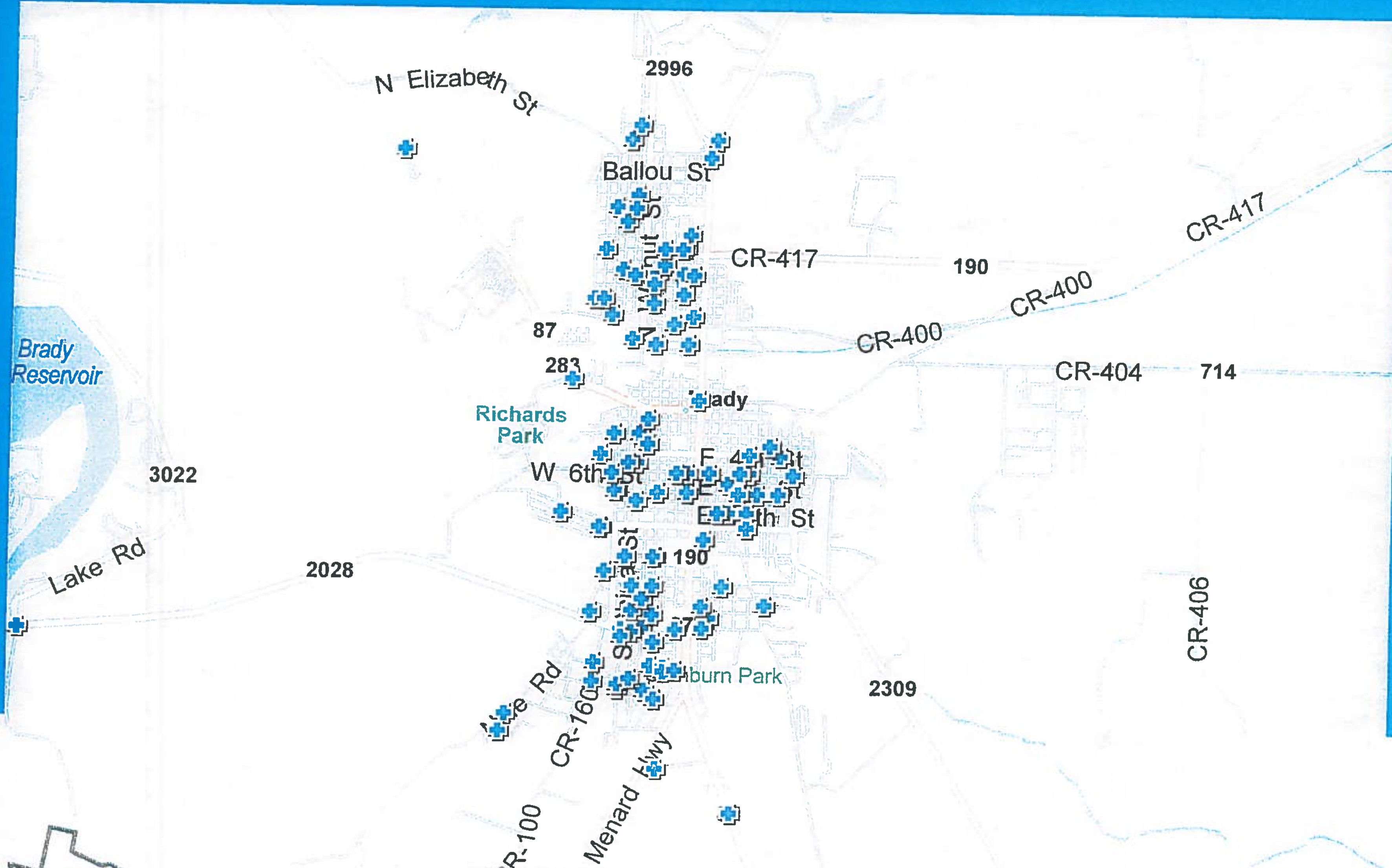
License Plate Survey | City View

Brady, Texas



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Retail Market Profile 2015

BRADY
THE TRUE HEART OF TEXAS

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July 2015. All information furnished is from sources deemed reliable and is submitted subject to errors, omissions, change of terms and/or conditions. Prepared by The Retail Coach, LLC, a national retail consulting and market research firm. 800.851.0962.

Population

	2000	2010	2015 ESTIMATE	2020 PROJECTION
Primary Retail Trade Area	20,778	21,018	21,360	21,970

Income

	2015 ESTIMATE
Average Household	$63,070
Median Household	$41,416
Per Capita	$26,405

Educational Attainment

	2015 ESTIMATE
Graduate or Professional	5.59%
Bachelor's Degree	12.59%
Associate Degree	4.61%
Some College, No Degree	21.16%
High School Graduate	34.81%
Some High School, No Degree	8.87%
Less than 9th Grade	12.35%

Race Distribution

	2015 ESTIMATE
White	83.01%
Black or African American	2.48%
American Indian/ Alaskan	0.73%
Asian	0.48%
Native Hawaiian/ Islander	0.04%
Other Race	11.21%
Two or More Races	2.07%
Hispanic or Latino (of any race)	36.19%

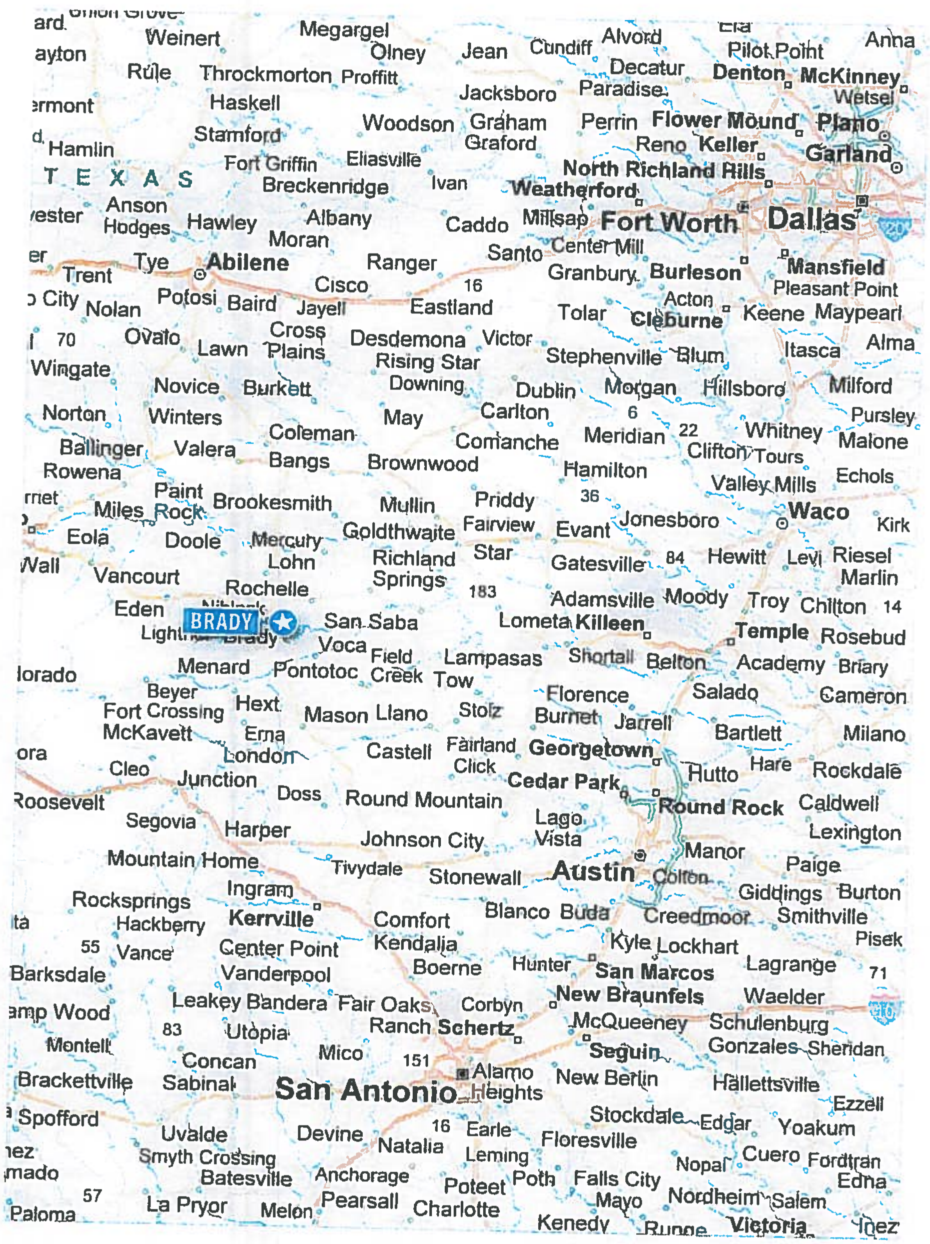
Age

GROUPS	2015 ESTIMATE
9 Years and Under	11.09%
10-17 Years	9.47%
18-24 Years	8.24%
25-34 Years	11.76%
35-44 Years	11.42%
45-54 Years	12.27%
55-64 Years	13.80%
65 Years and Over	21.97%

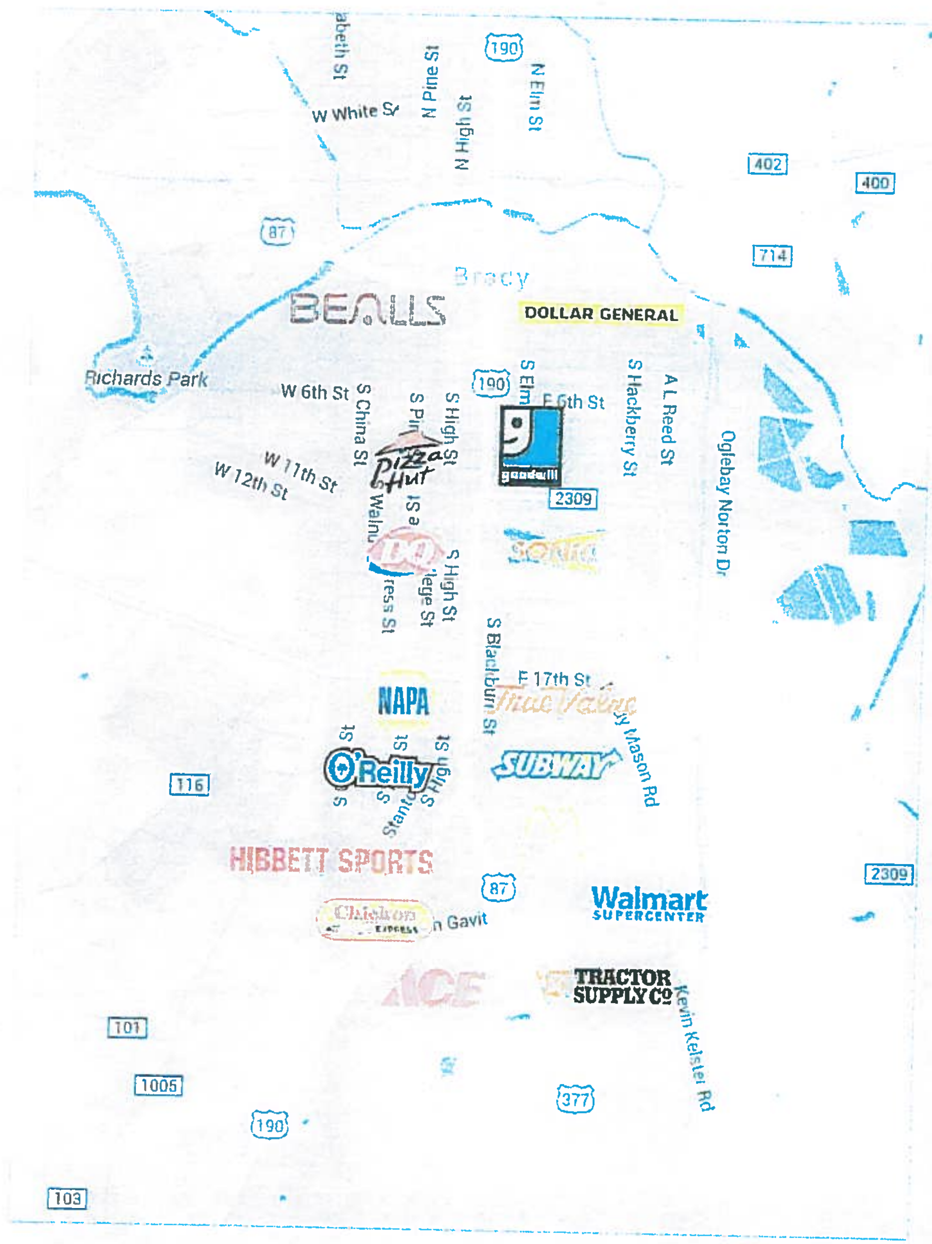
DISTRIBUTION	2015 ESTIMATE
Median Age	43.3
Average Age	42.7

TheRetailCoach

LOCATION MAP

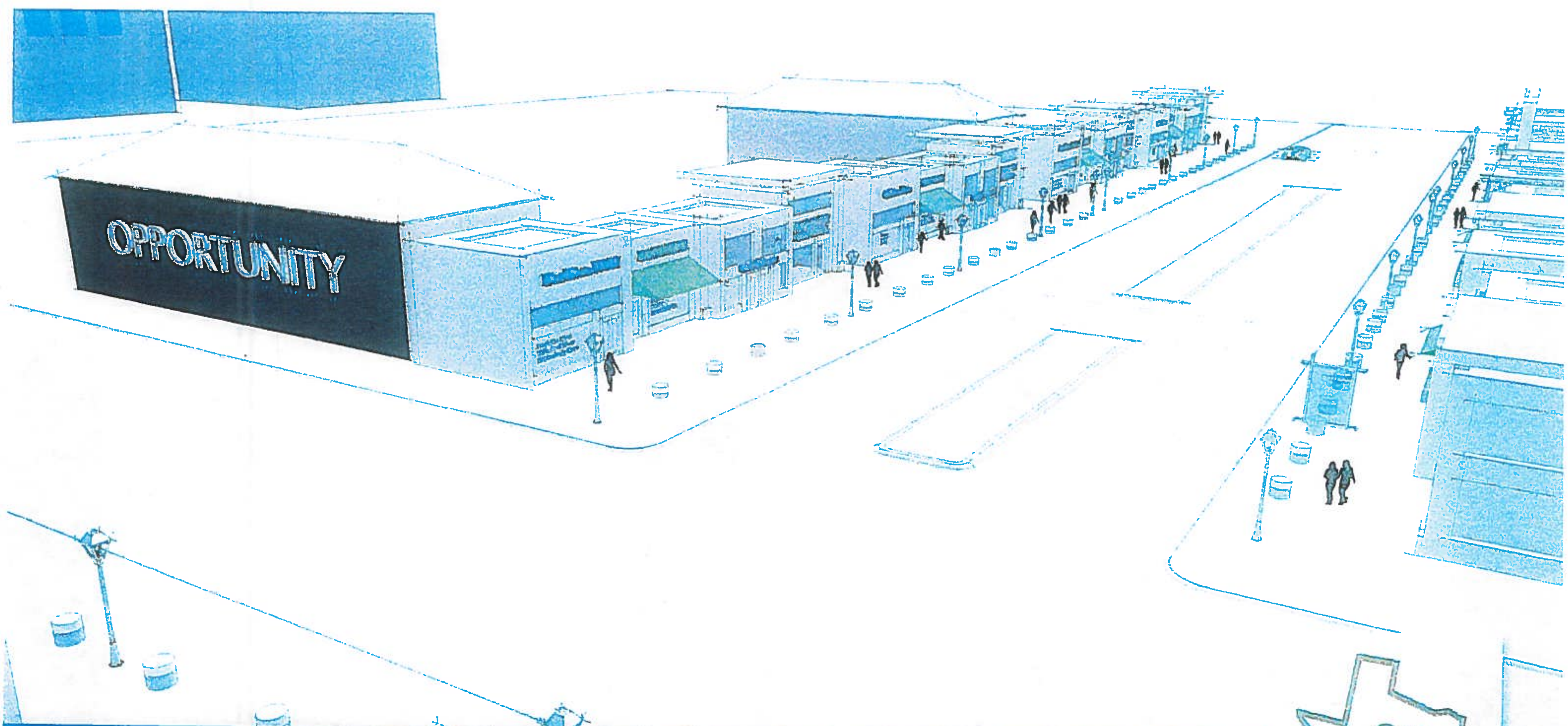


EXISTING RETAIL



Information provided is for illustrative purposes only and is deemed to be correct as of publish date of this document.
Data sources used may include: ESRI, AGS, Nielsen, RegisPro, SitesUSA, TxDOT and/or Microsoft Corporation.

TheRetailCoach



PRIMARY RETAIL TRADE AREA DEMOGRAPHIC PROFILE

Brady, Texas

BRADY THE TRUE HEART OF TEXAS

Prepared for
City of Brady
July 2015

TheRetailCoach®

Primary Retail Trade Area
Brady, Texas

BRADY
THE TRUE HEART OF TEXAS

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Primary Retail Trade Area | Demographics
Brady, Texas

DESCRIPTION	DATA	%
Population		
2020 Projection	21,970	
2015 Estimate	21,360	
2010 Census	21,018	
2000 Census	20,778	
Growth 2015-2020	2.86%	
Growth 2010-2015	1.63%	
Growth 2000-2010	1.16%	
2015 Est. Population by Single-Classification Race	21,360	
White Alone	17,730	83.01
Black or African American Alone	529	2.48
Amer. Indian and Alaska Native Alone	155	0.73
Asian Alone	102	0.48
Native Hawaiian and Other Pac. Isl. Alone	9	0.04
Some Other Race Alone	2,395	11.21
Two or More Races	442	2.07
2015 Est. Population by Hispanic or Latino Origin	21,360	
Not Hispanic or Latino	13,629	63.81
Hispanic or Latino:	7,731	36.19
Mexican	6,732	87.08
Puerto Rican	46	0.60
Cuban	29	0.38
All Other Hispanic or Latino	923	11.94

DESCRIPTION	DATA	%
2015 Est. Hisp. or Latino Pop by Single-Class. Race	7,731	
White Alone	4,957	64.12
Black or African American Alone	62	0.80
American Indian and Alaska Native Alone	72	0.93
Asian Alone	1	0.01
Native Hawaiian and Other Pacific Islander Alone	0	0.00
Some Other Race Alone	2,380	30.79
Two or More Races	259	3.35
2015 Est. Pop by Race, Asian Alone, by Category	102	
Chinese, except Taiwanese	5	4.90
Filipino	2	1.96
Japanese	2	1.96
Asian Indian	19	18.63
Korean	0	0.00
Vietnamese	21	20.59
Cambodian	0	0.00
Hmong	0	0.00
Laotian	0	0.00
Thai	2	1.96
All Other Asian Races Including 2+ Category	51	50.00
2015 Est. Population by Ancestry	21,360	
Arab	0	0.00
Czech	36	0.17
Danish	1	0.00
Dutch	161	0.75
English	1,331	6.23
French (except Basque)	217	1.02
French Canadian	3	0.01
German	2,335	10.93
Greek	2	0.01

Primary Retail Trade Area | *Demographics*

Brady, Texas

DESCRIPTION	DATA	%
Hungarian	0	0.00
Irish	1,119	5.24
Italian	155	0.73
Lithuanian	0	0.00
United States or American	4,145	19.41
Norwegian	61	0.29
Polish	28	0.13
Portuguese	0	0.00
Russian	40	0.19
Scottish	167	0.78
Scotch-Irish	366	1.71
Slovak	0	0.00
Subsaharan African	5	0.02
Swedish	149	0.70
Swiss	43	0.20
Ukrainian	0	0.00
Welsh	37	0.17
West Indian (except Hisp. groups)	7	0.03
Other ancestries	7,470	34.97
Ancestry Unclassified	3,483	16.31
2015 Est. Pop Age 5+ by Language Spoken at Home	20,185	
Speak Only English at Home	15,296	75.78
Speak Asian/Pac. Isl. Lang. at Home	65	0.32
Speak IndoEuropean Language at Home	132	0.65
Speak Spanish at Home	4,692	23.24
Speak Other Language at Home	0	0.00
2015 Est. Population by Sex	21,360	
Male	11,466	53.68
Female	9,894	46.32

DESCRIPTION	DATA	%
2015 Est. Population by Age	21,360	
Age 0 - 4	1,175	5.50
Age 5 - 9	1,193	5.59
Age 10 - 14	1,244	5.82
Age 15 - 17	779	3.65
Age 18 - 20	736	3.45
Age 21 - 24	1,023	4.79
Age 25 - 34	2,511	11.76
Age 35 - 44	2,439	11.42
Age 45 - 54	2,621	12.27
Age 55 - 64	2,947	13.80
Age 65 - 74	2,624	12.28
Age 75 - 84	1,445	6.76
Age 85 and over	624	2.92
Age 16 and over	17,499	81.92
Age 18 and over	16,970	79.45
Age 21 and over	16,234	76.00
Age 65 and over	4,694	21.98
2015 Est. Median Age	43.3	
2015 Est. Average Age	42.7	

Primary Retail Trade Area | Demographics
Brady, Texas

DESCRIPTION	DATA	%
2015 Est. Male Population by Age	11,466	
Age 0 - 4	609	5.31
Age 5 - 9	624	5.44
Age 10 - 14	640	5.58
Age 15 - 17	406	3.54
Age 18 - 20	412	3.59
Age 21 - 24	616	5.37
Age 25 - 34	1,624	14.16
Age 35 - 44	1,452	12.66
Age 45 - 54	1,420	12.38
Age 55 - 64	1,481	12.92
Age 65 - 74	1,307	11.40
Age 75 - 84	644	5.62
Age 85 and over	230	2.01
2015 Est. Median Age, Male	40.5	
2015 Est. Average Age, Male	41.2	
2015 Est. Female Population by Age	9,894	
Age 0 - 4	565	5.71
Age 5 - 9	568	5.74
Age 10 - 14	603	6.09
Age 15 - 17	372	3.76
Age 18 - 20	325	3.28
Age 21 - 24	407	4.11
Age 25 - 34	887	8.97
Age 35 - 44	987	9.98
Age 45 - 54	1,201	12.14
Age 55 - 64	1,466	14.82
Age 65 - 74	1,317	13.31
Age 75 - 84	802	8.11
Age 85 and over	394	3.98

DESCRIPTION	DATA	%
2015 Est. Median Age, Female	46.9	
2015 Est. Average Age, Female	44.5	
2015 Est. Pop Age 15+ by Marital Status	17,749	
Total, Never Married	4,115	23.18
Males, Never Married	2,879	16.22
Females, Never Married	1,236	6.96
Married, Spouse present	8,191	46.15
Married, Spouse absent	1,392	7.84
Widowed	1,732	9.76
Males Widowed	321	1.81
Females Widowed	1,411	7.95
Divorced	2,320	13.07
Males Divorced	1,259	7.09
Females Divorced	1,060	5.97
2015 Est. Pop Age 25+ by Edu. Attainment	15,212	
Less than 9th grade	1,879	12.35
Some High School, no diploma	1,350	8.87
High School Graduate (or GED)	5,295	34.81
Some College, no degree	3,219	21.16
Associate Degree	702	4.61
Bachelor's Degree	1,915	12.59
Master's Degree	642	4.22
Professional School Degree	130	0.85
Doctorate Degree	79	0.52
2015 Est. Pop Age 25+ by Edu. Attain., Hisp./Lat.	4,864	
No High School Diploma	2,048	42.11
High School Graduate	1,817	37.36
Some College or Associate's Degree	775	15.93
Bachelor's Degree or Higher	223	4.58

Primary Retail Trade Area | Demographics
Brady, Texas

DESCRIPTION	DATA	%
Households		
2020 Projection	8,318	
2015 Estimate	8,066	
2010 Census	7,910	
2000 Census	7,797	
Growth 2015-2020	3.12%	
Growth 2010-2015	1.97%	
Growth 2000-2010	1.45%	
2015 Est. Households by Household Type	8,066	
Family Households	5,467	67.78
Nonfamily Households	2,599	32.22
2015 Est. Group Quarters Population	2,094	
2015 HHs by Ethnicity, Hispanic/Latino	2,024	25.09
2015 Est. Households by HH Income	8,066	
Income < $15,000	1,260	15.62
Income $15,000 - $24,999	1,153	14.29
Income $25,000 - $34,999	1,025	12.71
Income $35,000 - $49,999	1,391	17.25
Income $50,000 - $74,999	1,197	14.84
Income $75,000 - $99,999	768	9.52
Income $100,000 - $124,999	541	6.71
Income $125,000 - $149,999	241	2.99
Income $150,000 - $199,999	165	2.05
Income $200,000 - $249,999	80	0.99
Income $250,000 - $499,999	118	1.46
Income $500,000+	127	1.57

DESCRIPTION	DATA	%
2015 Est. Average Household Income	$63,070	
2015 Est. Median Household Income	$41,416	
2015 Median HH Inc. by Single-Class. Race or Eth.		
White Alone	43,296	
Black or African American Alone	38,339	
American Indian and Alaska Native Alone	35,938	
Asian Alone	58,373	
Native Hawaiian and Other Pacific Islander Alone	74,233	
Some Other Race Alone	32,590	
Two or More Races	23,058	
Hispanic or Latino	33,844	
Not Hispanic or Latino	44,335	
2015 Est. Family HH Type by Presence of Own Child.	5,467	
Married-Couple Family, own children	1,310	23.96
Married-Couple Family, no own children	2,948	53.92
Male Householder, own children	218	3.99
Male Householder, no own children	177	3.24
Female Householder, own children	465	8.51
Female Householder, no own children	348	6.37
2015 Est. Households by Household Size	8,066	
1-person	2,378	29.48
2-person	3,012	37.34
3-person	1,112	13.79
4-person	799	9.91
5-person	455	5.64
6-person	195	2.42
7-or-more-person	115	1.43

Primary Retail Trade Area | *Demographics*
Brady, Texas

DESCRIPTION	DATA	%
2015 Est. Average Household Size	2.39	
2015 Est. Households by Presence of People Under 18	8,066	
Households with 1 or More People under Age 18:	2,349	29.12
Married-Couple Family	1,511	64.33
Other Family, Male Householder	248	10.56
Other Family, Female Householder	567	24.14
Nonfamily, Male Householder	19	0.81
Nonfamily, Female Householder	4	0.17
Households with No People under Age 18:	5,717	70.88
Married-Couple Family	2,747	48.05
Other Family, Male Householder	147	2.57
Other Family, Female Householder	245	4.29
Nonfamily, Male Householder	1,218	21.30
Nonfamily, Female Householder	1,360	23.79
2015 Est. Households by Number of Vehicles	8,066	
No Vehicles	469	5.81
1 Vehicle	2,563	31.78
2 Vehicles	3,423	42.44
3 Vehicles	1,193	14.79
4 Vehicles	243	3.01
5 or more Vehicles	175	2.17
2015 Est. Average Number of Vehicles	1.9	

DESCRIPTION	DATA	%
Family Households		
2020 Projection	5,643	
2015 Estimate	5,467	
2010 Census	5,355	
2000 Census	5,369	
Growth 2015-2020	3.22%	
Growth 2010-2015	2.10%	
Growth 2000-2010	-0.28%	
2015 Est. Families by Poverty Status	5,467	
2015 Families at or Above Poverty	4,677	85.55
2015 Families at or Above Poverty with Children	1,778	32.52
2015 Families Below Poverty	790	14.45
2015 Families Below Poverty with Children	592	10.83
2015 Est. Pop Age 16+ by Employment Status	17,499	
In Armed Forces	11	0.06
Civilian - Employed	8,799	50.28
Civilian - Unemployed	488	2.79
Not in Labor Force	8,201	46.87
2015 Est. Civ. Employed Pop 16+ by Class of Worker	8,843	
For-Profit Private Workers	4,774	53.99
Non-Profit Private Workers	382	4.32
Local Government Workers	1,143	12.93
State Government Workers	447	5.05
Federal Government Workers	166	1.88
Self-Employed Workers	1,893	21.41
Unpaid Family Workers	38	0.43

Primary Retail Trade Area | Demographics
Brady, Texas

DESCRIPTION	DATA	%
2015 Est. Civ. Employed Pop 16+ by Occupation	8,843	
Architect/Engineer	64	0.72
Arts/Entertainment/Sports	65	0.74
Building Grounds Maintenance	330	3.73
Business/Financial Operations	206	2.33
Community/Social Services	139	1.57
Computer/Mathematical	92	1.04
Construction/Extraction	942	10.65
Education/Training/Library	670	7.58
Farming/Fishing/Forestry	407	4.60
Food Prep/Serving	613	6.93
Health Practitioner/Technician	298	3.37
Healthcare Support	124	1.40
Maintenance Repair	293	3.31
Legal	69	0.78
Life/Physical/Social Science	67	0.76
Management	905	10.23
Office/Admin. Support	1,022	11.56
Production	459	5.19
Protective Services	242	2.74
Sales/Related	872	9.86
Personal Care/Service	271	3.06
Transportation/Moving	692	7.83
2015 Est. Pop 16+ by Occupation Classification	8,843	
Blue Collar	2,386	26.98
White Collar	4,469	50.54
Service and Farm	1,988	22.48

DESCRIPTION	DATA	%
2015 Est. Workers Age 16+ by Transp. to Work	8,753	
Drove Alone	6,536	74.67
Car Pooled	1,273	14.54
Public Transportation	1	0.01
Walked	350	4.00
Bicycle	2	0.02
Other Means	148	1.69
Worked at Home	444	5.07
2015 Est. Workers Age 16+ by Travel Time to Work *		
Less than 15 Minutes	5,023	
15 - 29 Minutes	1,506	
30 - 44 Minutes	905	
45 - 59 Minutes	333	
60 or more Minutes	535	
2015 Est. Avg. Travel Time to Work in Minutes	19.59	
2015 Est. Occupied Housing Units by Tenure	8,066	
Owner Occupied	5,999	74.37
Renter Occupied	2,068	25.64
2015 Owner Occ. HUs: Avg. Length of Residence	17.9	
2015 Renter Occ. HUs: Avg. Length of Residence	8.6	

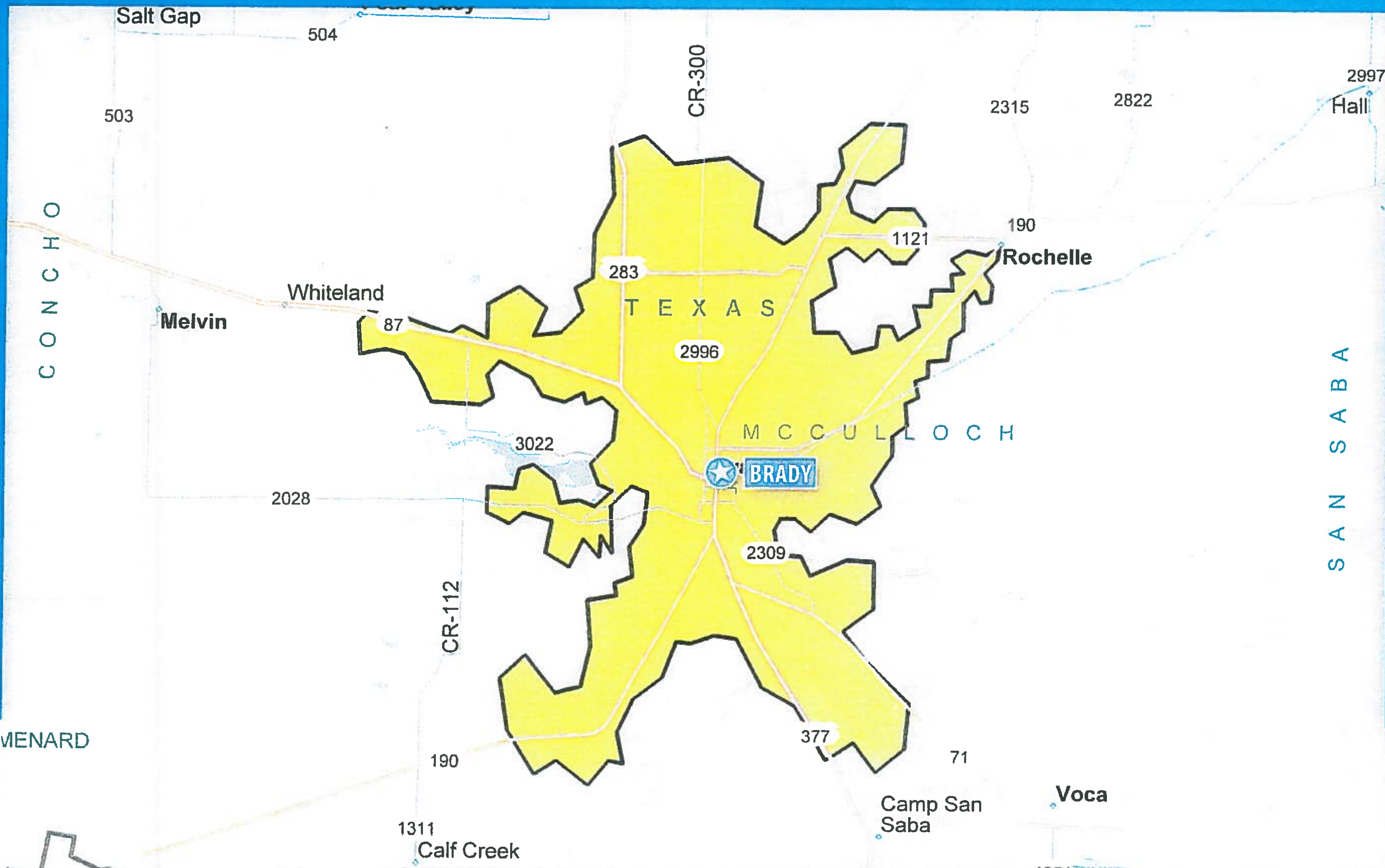
Primary Retail Trade Area | *Demographics*
Brady, Texas

DESCRIPTION	DATA	%
2015 Est. Owner-Occupied Housing Units by Value	5,999	
Value Less than $20,000	422	7.03
Value $20,000 - $39,999	839	13.99
Value $40,000 - $59,999	817	13.62
Value $60,000 - $79,999	832	13.87
Value $80,000 - $99,999	630	10.50
Value $100,000 - $149,999	799	13.32
Value $150,000 - $199,999	559	9.32
Value $200,000 - $299,999	407	6.78
Value $300,000 - $399,999	201	3.35
Value $400,000 - $499,999	135	2.25
Value $500,000 - $749,999	173	2.88
Value $750,000 - $999,999	88	1.47
Value $1,000,000 or more	96	1.60
2015 Est. Median All Owner-Occupied Housing Value	$82,856	
2015 Est. Housing Units by Units in Structure	11,017	
1 Unit Attached	110	1.00
1 Unit Detached	9,079	82.41
2 Units	380	3.45
3 or 4 Units	83	0.75
5 to 19 Units	134	1.22
20 to 49 Units	32	0.29
50 or More Units	1	0.01
Mobile Home or Trailer	1,199	10.88
Boat, RV, Van, etc.	0	0.00

DESCRIPTION	DATA	%
2015 Est. Housing Units by Year Structure Built	11,017	
Housing Units Built 2010 or later	235	2.13
Housing Units Built 2000 to 2009	891	8.09
Housing Units Built 1990 to 1999	1,135	10.30
Housing Units Built 1980 to 1989	1,234	11.20
Housing Units Built 1970 to 1979	1,507	13.68
Housing Units Built 1960 to 1969	1,394	12.65
Housing Units Built 1950 to 1959	1,462	13.27
Housing Units Built 1940 to 1949	945	8.58
Housing Unit Built 1939 or Earlier	2,213	20.09
2015 Est. Median Year Structure Built**	1966	

10-Minute Drive Time

Brady, Texas



BRADY
THE TRUE HEART OF
TEXAS

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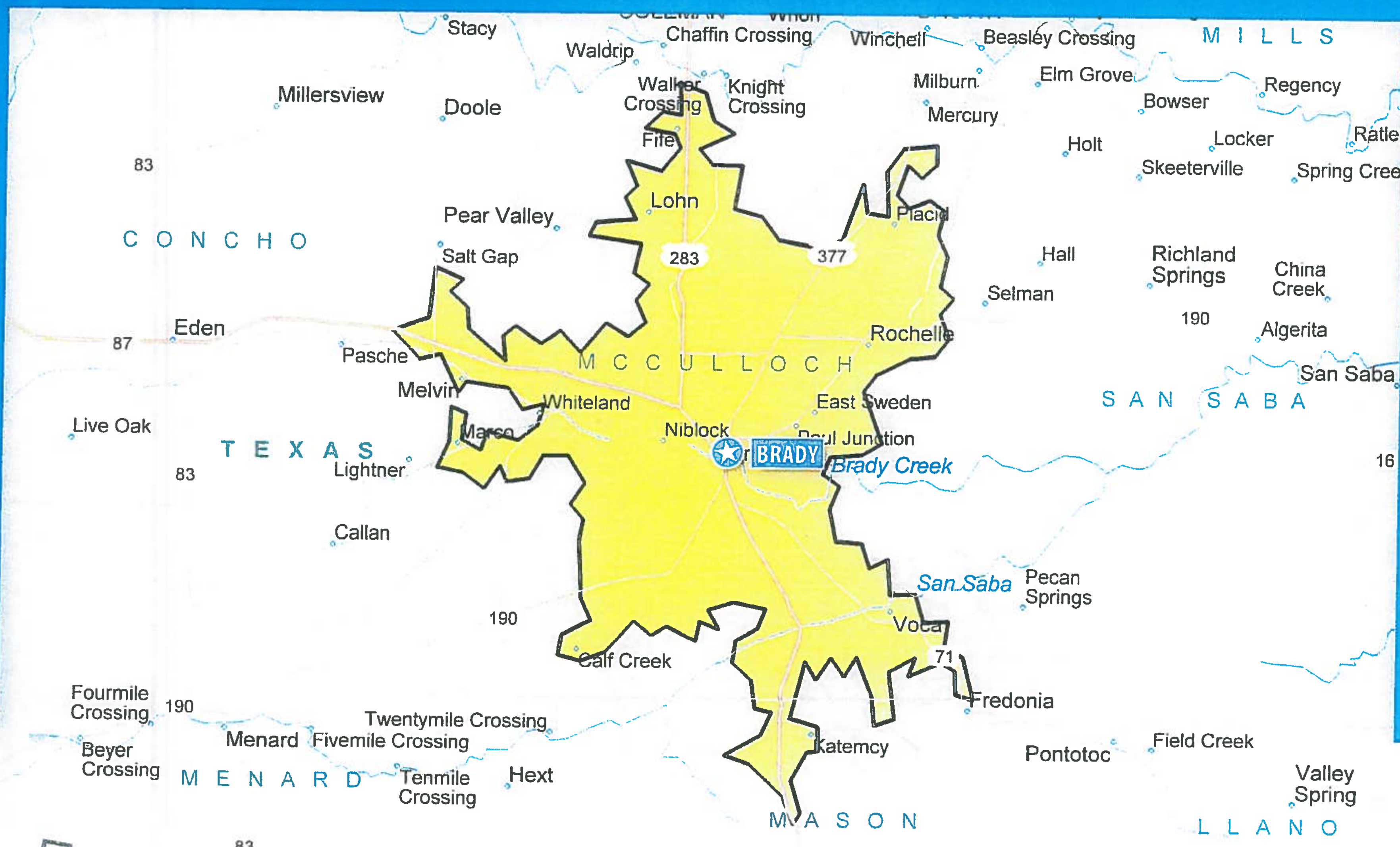
20-Minute Drive Time

Brady, Texas



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30-Minute Drive Time

Brady, Texas

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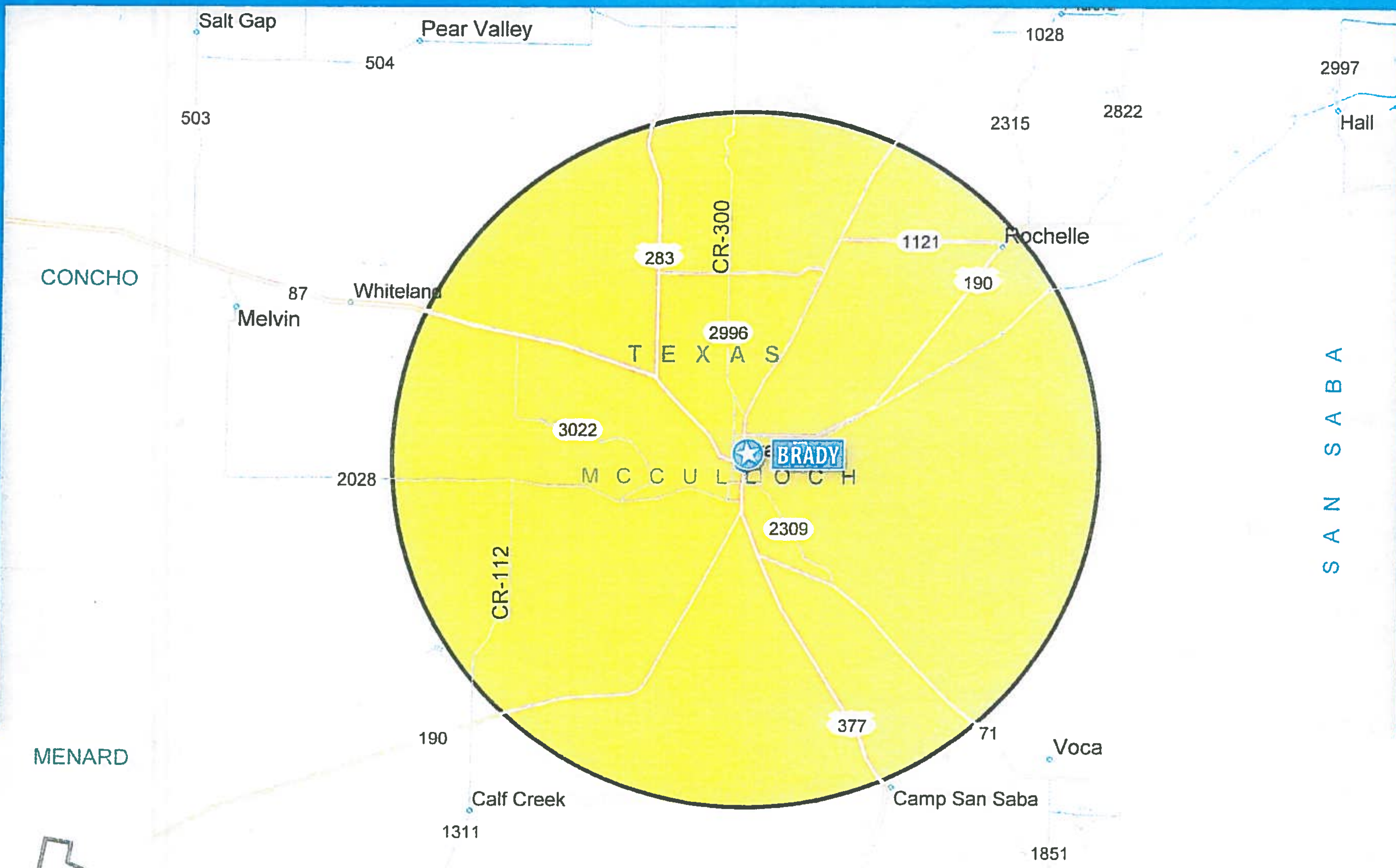
10-Mile Radial

Brady, Texas



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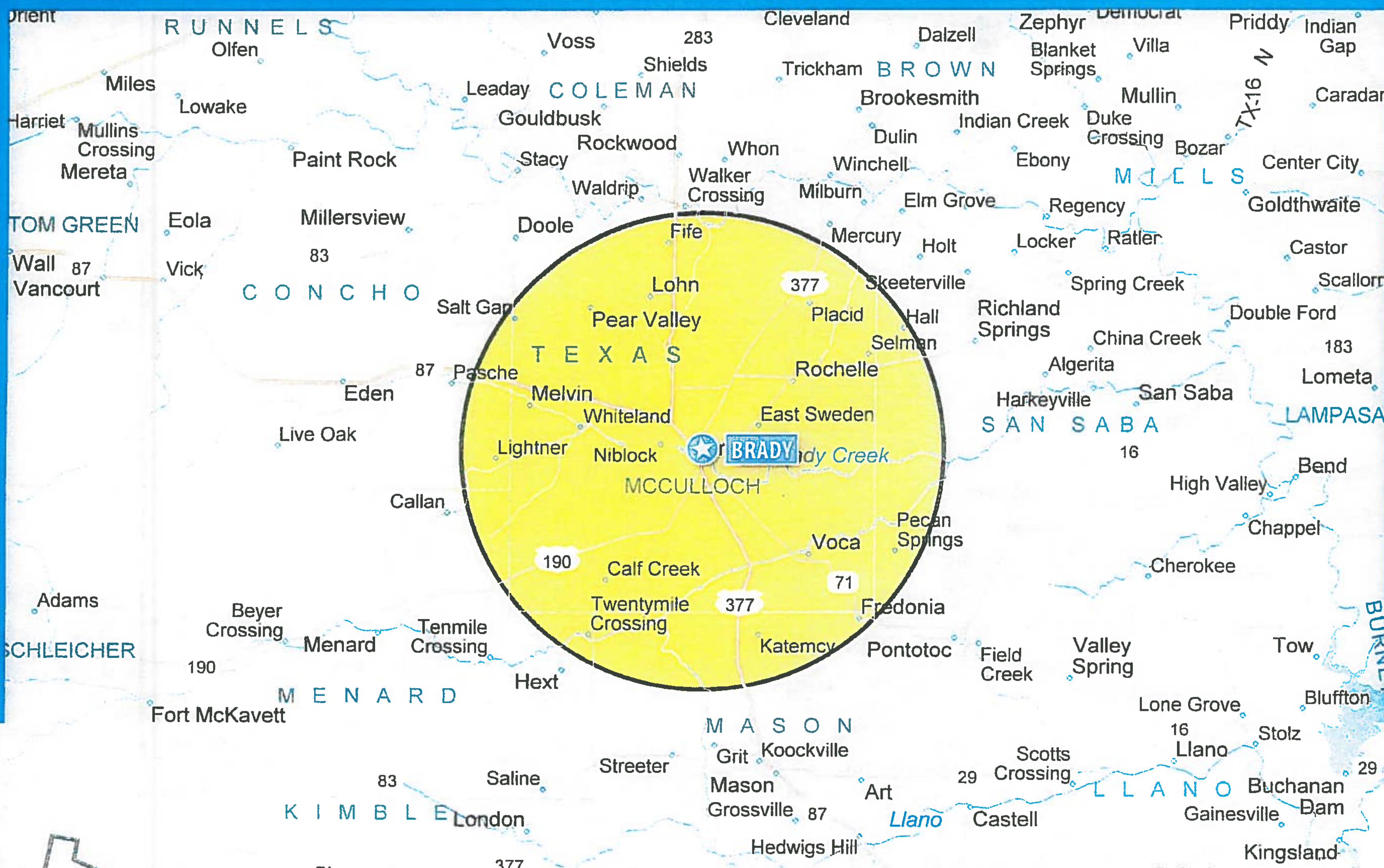
20-Mile Radial
Brady, Texas



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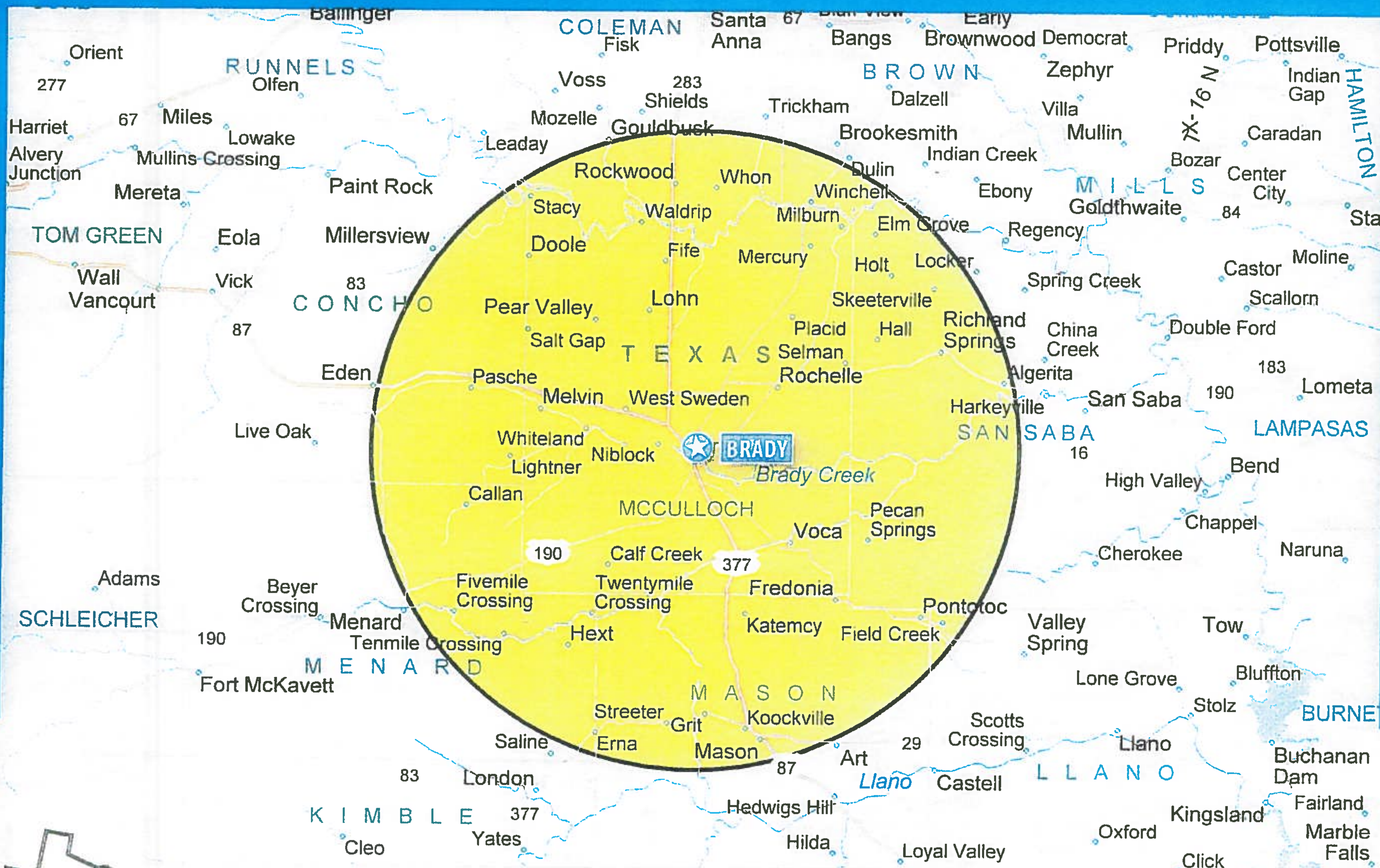
BRADY THE TRUE HEART OF TEXAS

30-Mile Radial

Brady, Texas



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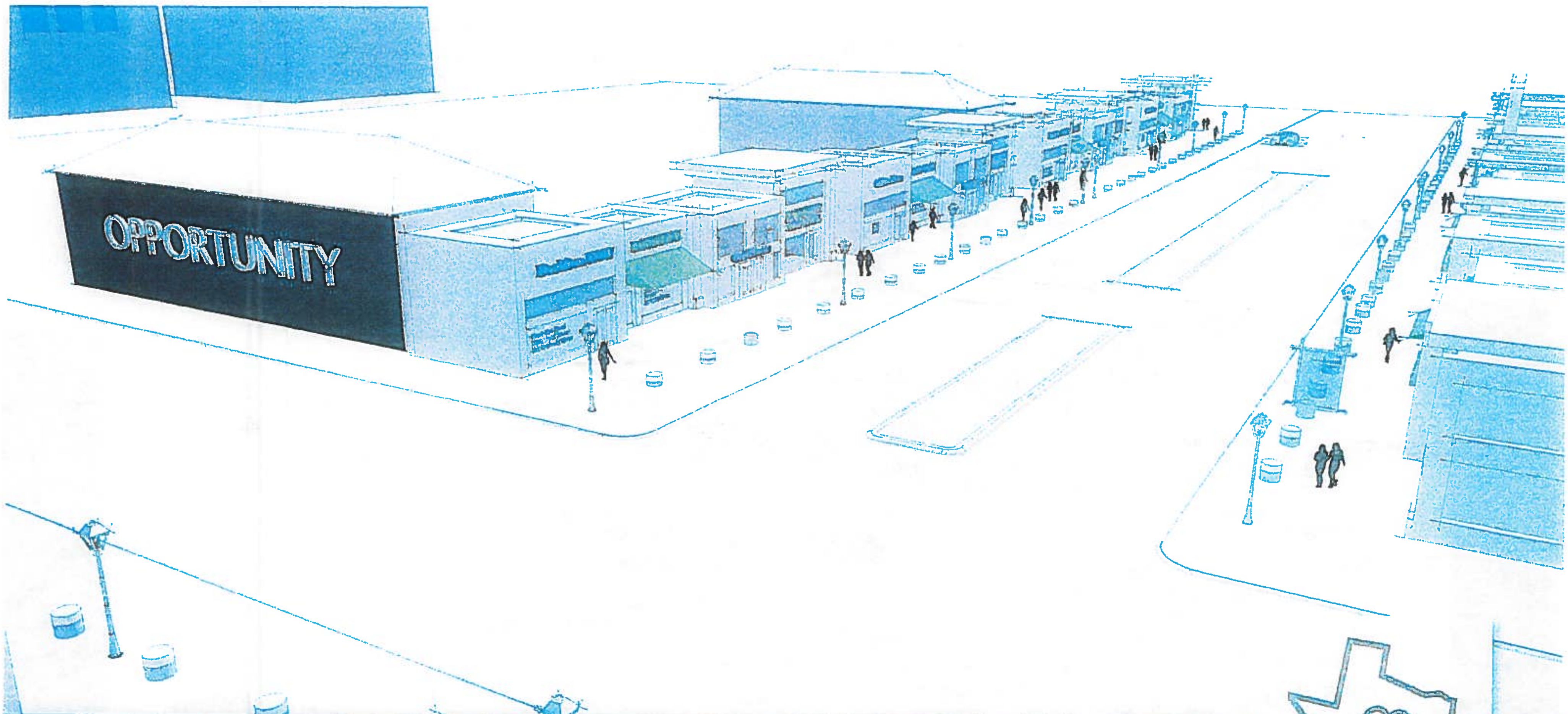

PRIMARY RETAIL TRADE AREA GAP/OPPORTUNITY ANALYSIS

Brady, Texas

BRADY
THE TRUE HEART OF TEXAS

Prepared for
City of Brady
July 2015

TheRetailCoach®

Primary Retail Trade Area

Brady, Texas

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BRADY THE TRUE HEART OF TEXAS

Primary Retail Trade Area | Gap/Opportunity Analysis Summary
Brady, Texas

SECTOR	DESCRIPTION	POTENTIAL SALES	EST. ACTUAL SALES	SURPLUS/LEAKAGE	% SURPLUS
	Total Retail Sales Incl Eating and Drinking Places	**321,142,012**	**116,956,690**	**(204,185,322)**	**-64%**
441	Motor Vehicle and Parts Dealers	56,650,085	18,653,284	(37,996,801)	-67%
4411	Automotive Dealers	47,153,079	14,023,195	(33,129,884)	-70%
4412	Other Motor Vehicle Dealers	4,791,161	1,847,910	(2,943,251)	-61%
4413	Automotive Parts/Accsrs, Tire Stores	4,705,845	2,782,179	(1,923,666)	-41%
442	Furniture and Home Furnishings Stores	6,034,307	2,568,116	(3,466,191)	-57%
4421	Furniture Stores	3,151,135	2,523,121	(628,014)	-20%
4422	Home Furnishing Stores	2,883,172	44,995	(2,838,177)	-98%
443	Electronics and Appliance Stores	5,318,036	70,437	(5,247,599)	-99%
44311	Appliances, TVs, Electronics Stores	4,128,904	70,437	(4,058,467)	-98%
443111	Household Appliances Stores	752,772	14,641	(738,131)	-98%
443112	Radio, Television, Electronics Stores	3,376,132	55,796	(3,320,336)	-98%
44312	Computer and Software Stores	1,068,539	0	(1,068,539)	-100%
44313	Camera and Photographic Equipment Stores	120,593	0	(120,593)	-100%
444	Building Material, Garden Equip Stores	33,493,212	7,990,279	(25,502,933)	-76%
4441	Building Material and Supply Dealers	28,759,729	7,447,056	(21,312,673)	-74%
44411	Home Centers	11,629,196	0	(11,629,196)	-100%
44412	Paint and Wallpaper Stores	488,621	0	(488,621)	-100%
44413	Hardware Stores	2,818,505	7,447,056	4,628,551	164%
44419	Other Building Materials Dealers	13,823,407	0	(13,823,407)	-100%
4442	Lawn, Garden Equipment, Supplies Stores	4,733,484	543,223	(4,190,261)	-89%
44421	Outdoor Power Equipment Stores	1,300,716	0	(1,300,716)	-100%
44422	Nursery and Garden Centers	3,432,767	543,223	(2,889,544)	-84%

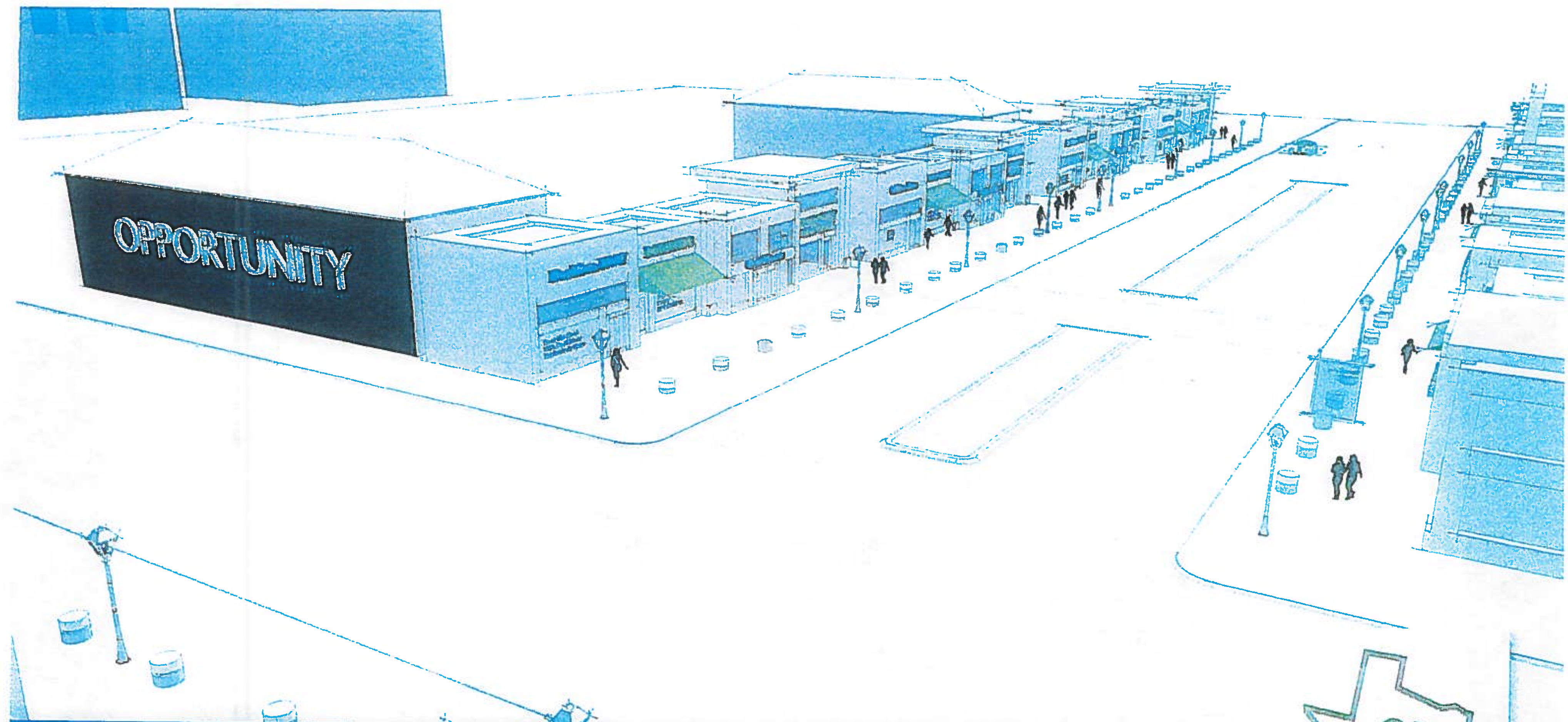
Primary Retail Trade Area | Gap/Opportunity Analysis Summary

Brady, Texas

SECTOR	DESCRIPTION	POTENTIAL SALES	EST. ACTUAL SALES	SURPLUS/LEAKAGE	% SURPLUS
445	Food and Beverage Stores	41,983,566	18,640,040	(23,343,526)	-56%
4451	Grocery Stores	27,556,395	16,146,246	(11,410,149)	-41%
44511	Supermarkets, Grocery (Ex Conv) Stores	25,761,941	14,750,402	(11,011,539)	-43%
44512	Convenience Stores	1,794,454	1,395,844	(398,610)	-22%
4452	Specialty Food Stores	3,315,794	454,277	(2,861,517)	-86%
4453	Beer, Wine and Liquor Stores	11,111,377	2,039,517	(9,071,860)	-82%
446	Health and Personal Care Stores	21,191,698	3,121,542	(18,070,156)	-85%
44611	Pharmacies and Drug Stores	17,127,561	3,000,865	(14,126,696)	-82%
44612	Cosmetics, Beauty Supplies, Perfume Stores	1,513,074	0	(1,513,074)	-100%
44613	Optical Goods Stores	652,988	0	(652,988)	-100%
44619	Other Health and Personal Care Stores	1,898,074	120,677	(1,777,397)	-94%
447	Gasoline Stations	32,108,025	15,155,725	(16,952,300)	-53%
44711	Gasoline Stations With Conv Stores	23,472,685	10,296,865	(13,175,820)	-56%
44719	Other Gasoline Stations	8,635,340	4,858,860	(3,776,480)	-44%
448	Clothing and Clothing Accessories Stores	12,941,171	3,862,509	(9,078,662)	-70%
4481	Clothing Stores	6,773,577	2,813,633	(3,959,944)	-58%
44811	Men's Clothing Stores	326,494	0	(326,494)	-100%
44812	Women's Clothing Stores	1,457,948	158,711	(1,299,237)	-89%
44813	Childrens, Infants Clothing Stores	450,040	0	(450,040)	-100%
44814	Family Clothing Stores	3,668,808	2,590,070	(1,078,738)	-29%
44815	Clothing Accessories Stores	285,147	0	(285,147)	-100%
44819	Other Clothing Stores	585,139	64,852	(520,287)	-89%
4482	Shoe Stores	1,049,318	0	(1,049,318)	-100%
4483	Jewelry, Luggage, Leather Goods Stores	5,118,276	1,048,876	(4,069,400)	-80%
44831	Jewelry Stores	4,584,014	1,048,876	(3,535,138)	-77%
44832	Luggage and Leather Goods Stores	534,262	0	(534,262)	-100%

Primary Retail Trade Area | Gap/Opportunity Analysis Summary
Brady, Texas

SECTOR	DESCRIPTION	POTENTIAL SALES	EST. ACTUAL SALES	SURPLUS/LEAKAGE	% SURPLUS
451	Sporting Goods, Hobby, Book, Music Stores	4,911,831	1,005,947	(3,905,884)	-80%
4511	Sportng Goods, Hobby, Musical Inst Stores	4,299,961	1,005,947	(3,294,014)	-77%
45111	Sporting Goods Stores	2,106,897	930,729	(1,176,168)	-56%
45112	Hobby, Toys and Games Stores	1,316,431	0	(1,316,431)	-100%
45113	Sew/Needlework/Piece Goods Stores	424,161	75,218	(348,943)	-82%
45114	Musical Instrument and Supplies Stores	452,472	0	(452,472)	-100%
4512	Book, Periodical and Music Stores	611,870	0	(611,870)	-100%
45121	Book Stores and News Dealers	514,358	0	(514,358)	-100%
451211	Book Stores	441,215	0	(441,215)	-100%
451212	News Dealers and Newsstands	73,144	0	(73,144)	-100%
45122	Prerecorded Tapes, CDs, Record Stores	97,512	0	(97,512)	-100%
452	General Merchandise Stores	36,603,805	33,485,124	(3,118,681)	-9%
4521	Department Stores Excl Leased Depts	14,951,398	0	(14,951,398)	-100%
4529	Other General Merchandise Stores	21,652,407	33,485,124	11,832,717	55%
453	Miscellaneous Store Retailers	8,654,146	601,154	(8,052,992)	-93%
4531	Florists	325,586	135,149	(190,437)	-58%
4532	Office Supplies, Stationery, Gift Stores	3,853,617	34,697	(3,818,920)	-99%
45321	Office Supplies and Stationery Stores	1,864,678	34,697	(1,829,981)	-98%
45322	Gift, Novelty and Souvenir Stores	1,988,939	0	(1,988,939)	-100%
4533	Used Merchandise Stores	545,375	160,394	(384,981)	-71%
4539	Other Miscellaneous Store Retailers	3,929,568	270,914	(3,658,654)	-93%
454	Non-Store Retailers	27,799,013	986,818	(26,812,195)	-96%
722	Foodservice and Drinking Places	33,453,119	10,815,715	(22,637,404)	-68%
7221	Full-Service Restaurants	15,078,995	2,561,262	(12,517,733)	-83%
7222	Limited-Service Eating Places	13,345,183	8,254,453	(5,090,730)	-38%
7223	Special Foodservices	3,670,817	0	(3,670,817)	-100%
7224	Drinking Places -Alcoholic Beverages	1,358,125	0	(1,358,125)	-100%



PRIMARY RETAIL TRADE AREA PSYCHOGRAPHIC PROFILE

Brady, Texas

Brady
THE TRUE HEART OF
TEXAS

Prepared for
City of Brady
July 2015

TheRetailCoach®

Primary Retail Trade Area

Brady, Texas

BRADY
THE TRUE HEART OF
TEXAS

Contact Information

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City of Brady
201 East Main Street / P.O. Box 351
Brady, Texas 76825

Phone 325.597.2152 ext. 211
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TheRetailCoach

TAPESTRY SEGMENTATION PROFILE

+ WHAT IS TAPESTRY SEGMENTATION?

Tapestry Segmentation is a market segmentation system that classifies US neighborhoods based on their socioeconomic and demographic compositions. Tapestry is a system for classifying consumers and constituents using all the variables that can distinguish consumer behavior, from household characteristics such as income and family type to personal traits like age, education, or employment and even housing choices.

Tapestry Segmentation classifies US neighborhoods into 67 distinct market segments. Neighborhoods with the most similar characteristics are grouped together, while neighborhoods with divergent characteristics are separated. Tapestry Segmentation combines the "who" of lifestyle demography with the "where" of local neighborhood geography to create a model of various lifestyle classifications, or segments, of actual neighborhoods with addresses—distinct behavioral market segments.

+ WHO SHOULD USE TAPESTRY SEGMENTATION?

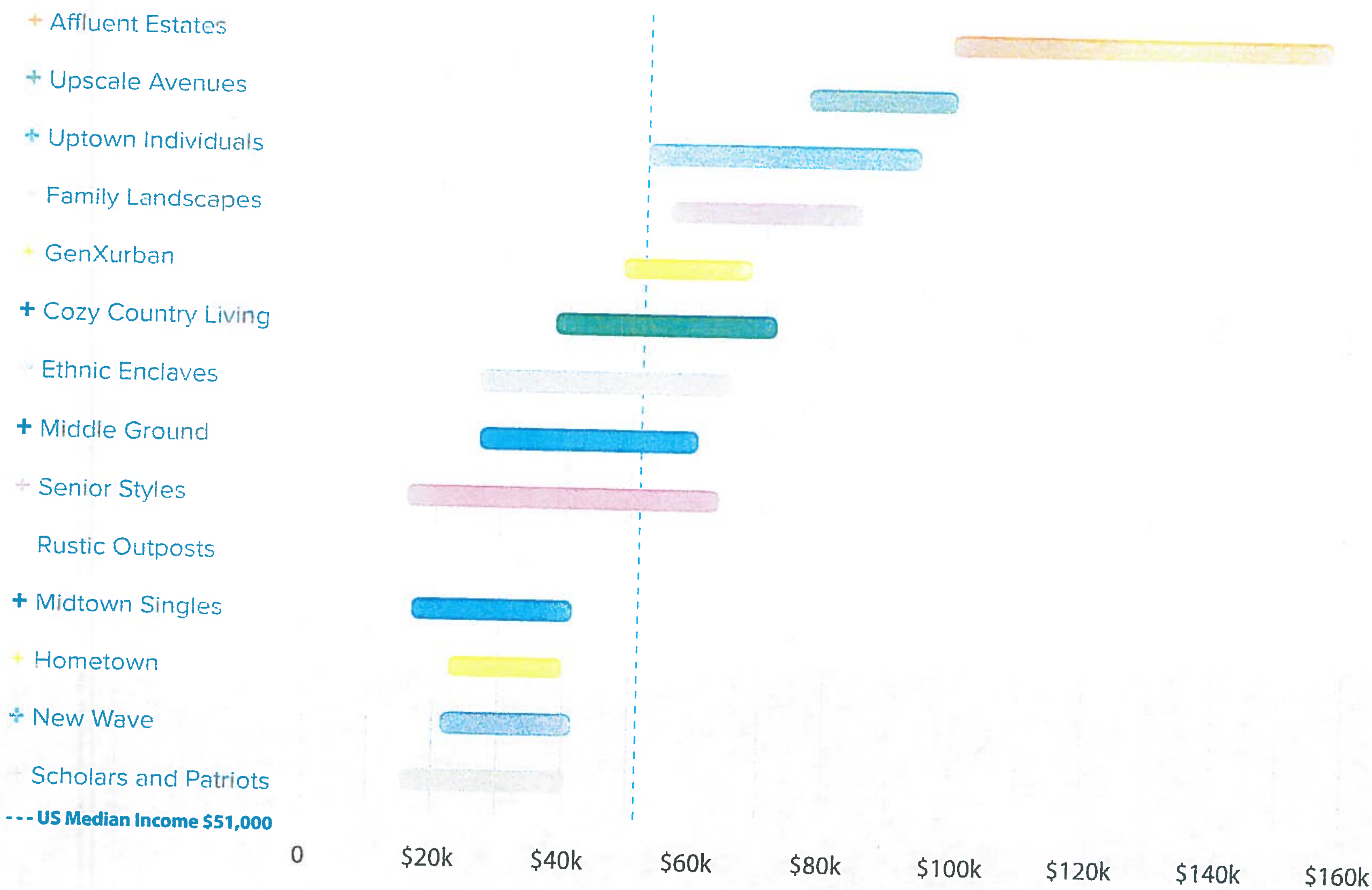
All companies, agencies, and organizations need to understand consumers/constituents in order to supply them with the right products and services and to reach them via their preferred media. These applications require a robust segmentation system that can accurately profile these diverse markets. The versatility and predictive power of Tapestry Segmentation allow users to integrate their own data or national consumer surveys into Tapestry Segmentation to identify their best market segments and reach them through the most effective channels.

+ TAPESTRY SEGMENTATION SUMMARY GROUPS

Esri's Tapestry Segmentation provides a robust, powerful portrait of the 67 US consumer markets. To provide a broader view of these 67 segments, Esri combined them into 14 LifeMode Summary Groups based on lifestyle and lifestage composition.

L1 Affluent Estates
L2 Upscale Avenues
L3 Uptown Individuals
L4 Family Landscapes
L5 GenXurban
L6 Cozy Country Living
L7 Ethnic Enclaves
L8 Middle Ground
L9 Senior Styles
L10 Rustic Outposts
L11 Midtown Singles
L12 Hometown
L13 New Wave
L14 Scholars and Patriots

INCOME RANGE OF LIFEMODE SUMMARY GROUPS



PRIMARY RETAIL TRADE AREA • LIFEMODE SUMMARY GROUPS MAP

Brady, Texas

+ L1 AFFLUENT ESTATES
Established wealth — educated, well traveled married couples

+ L2 UPSCALE AVENUES
Prosperous, married couples in higher density neighborhoods

+ L3 UPTOWN INDIVIDUALS
Younger, urban singles on the move

+ L4 FAMILY LANDSCAPES
Successful younger families in newer housing

+ L5 GENXURBAN
Gen X in middle age; families with fewer kids and a mortgage

+ L6 COZY COUNTRY
Empty nesters in bucolic settings

+ L7 ETHNIC ENCLAVES
Established diversity — young, Hispanic homeowners with families

+ L8 MIDDLE GROUND
Lifestyles of thirtysomethings

+ L9 SENIOR STYLES
Senior lifestyles reveal the effects of saving for retirement

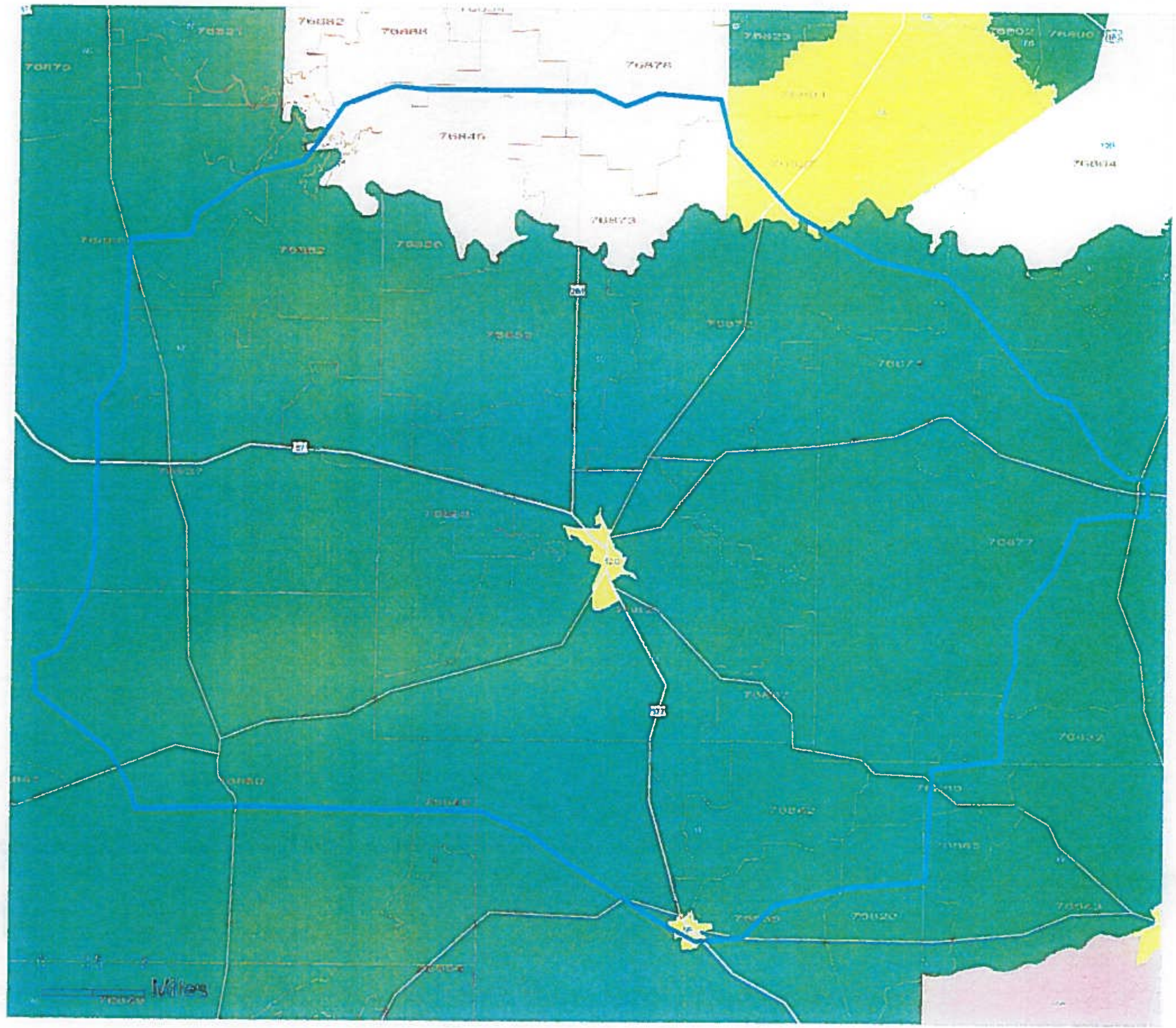
Country life with older families, older homes

+ L11 MIDTOWN SINGLES
Millennials on the move; single, diverse and urban

+ L12 HOMETOWN
Growing up and staying close to home; single householders

+ L13 NEXT WAVE
Urban denizens; young, diverse, hardworking families

College campuses and military neighborhoods



PRIMARY RETAIL TRADE AREA • TOP TAPESTRY SEGMENTS

Brady, Texas

	TAPESTRY SEGMENTATION	HOUSEHOLDS PERCENT	CUMULATIVE PERCENT	US HOUSEHOLDS PERCENT	CUMULATIVE PERCENT	INDEX
1	Rural Resort Dwellers (6E)	31.8%	31.8%	1.0%	1.0%	3,103
2	Heartland Communities (6F)	29.3%	61.1%	2.4%	3.4%	1,223
3	Midlife Constants (5E)	14.8%	75.9%	2.5%	5.9%	582
4	Small Town Simplicity (12C)	14.2%	90.1%	1.9%	7.8%	737
5	Rooted Rural (10B)	9.7%	99.8%	2.0%	9.8%	476
	Subtotal	**99.8%**		**9.8%**		
6	Comfortable Empty Nesters (5A)	0.2%	100.0%	2.5%	12.3%	9
	Total	**100.0%**		**12.4%**		**806**

LifeMode Group • Cozy Country Living

6E RURAL RESORT DWELLERS

Although the Great Recession forced many owners of second homes to sell, Rural Resort Dwellers residents remain an active market, just a bit smaller.

These communities are centered in resort areas, many in the Midwest, where the change in seasons supports a variety of outdoor activities. Retirement looms for many of these blue collar, older householders, but workers are postponing retirement or returning to work to maintain their current lifestyles. Workers are traveling further to maintain employment. They are passionate about their hobbies, like freshwater fishing and hunting, but otherwise have very simple tastes.

US Household // 1,215,000
Average Household Size // 2.21
Median Age // 52.4
Median Household Income // $46,000

6E

+ OUR NEIGHBORHOOD

- Housing is owner-occupied, single-family homes, with some mobile homes. A strong market for second homes, these rural areas provide affordable homes valued at 8% less than the US median home value. Over half of the housing units are vacant due to a high seasonal vacancy rate.
- In this older market, 42% of households consist of married couples with no children at home, while another 28% are single person. Married couples with children at home have older school-age children.
- Set in scenic rural locations with proximity to outdoor activities, two vehicles are essential to get around.

+ MARKET PROFILE

(Consumer preferences are estimated from data by GfK MRI)

- Residents drive older domestic vehicles and prefer to spend their disposable income on gear to support their hobbies, which include freshwater fishing, hunting with a rifle or shotgun, and motorcycling.
- At home, Rural Resort Dwellers residents spend any free time working on their vehicles and maintaining their gear. They make frequent trips to their local hardware store for parts and tools. These hands-on consumers are also passionate about vegetable gardening.
- Due to their remote locations, these neighborhoods have satellite dishes. A few residents still rely on dial-up modems to stay connected. They don't access the Internet often but will make online purchases for items difficult to find in nearby stores.
- Their taste in TV shows reflects their hobbies—Animal Planet, Discovery Channel, and the DIY Network.

+ SOCIOECONOMIC TRAITS

- Rural Resort Dwellers residents are close to retirement. They've accumulated wealth and begun to shift their portfolios to low-risk assets. These active residents continue to work in skilled occupations.
- Simple tastes and modesty characterize these blue collar residents. They shop for timeless, comfortable clothing, but only when something must be replaced. They pay little attention to advertising and usually stick to the brands they know.
- They spend time with their spouses and also maintain a social calendar.

+ HOUSING

Median home value is displayed for markets that are primarily owner occupied; average rent is shown for renter-occupied markets. Tenure and home value are estimated by Esri. Housing type and average rent are from the Census Bureau's American Community Survey.

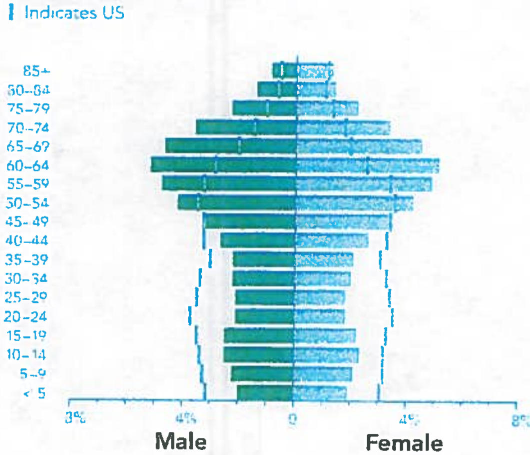
Typical Housing:
Single Family
Median Value:
$163,000
US Median: $177,000

6E

RURAL RESORT LIVING LifeMode Group • Cozy Country Living

AGE BY SEX (Esri data)

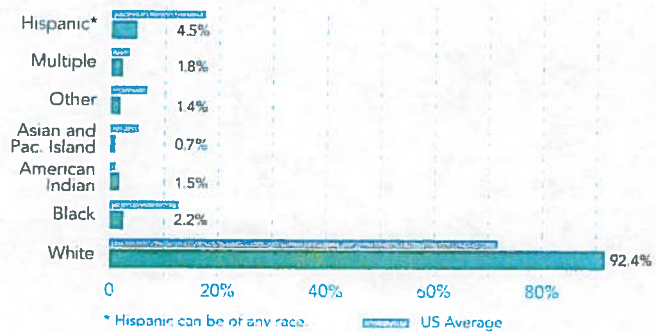
Median Age: 52.4 US: 37.6



RACE AND ETHNICITY (Esri data)

The Diversity Index summarizes racial and ethnic diversity. The index shows the likelihood that two persons, chosen at random from the same area, belong to different race or ethnic groups. The index ranges from 0 (no diversity) to 100 (complete diversity).

Diversity Index: 21.9 US: 62.1



INCOME AND NET WORTH

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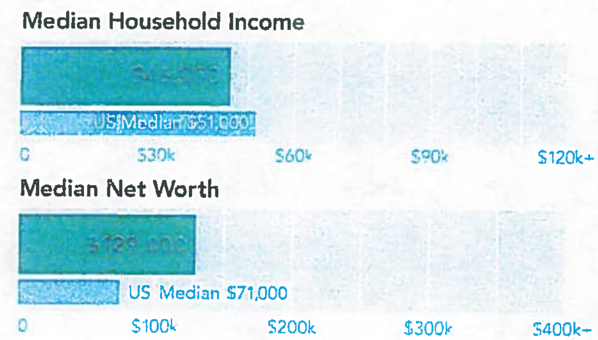
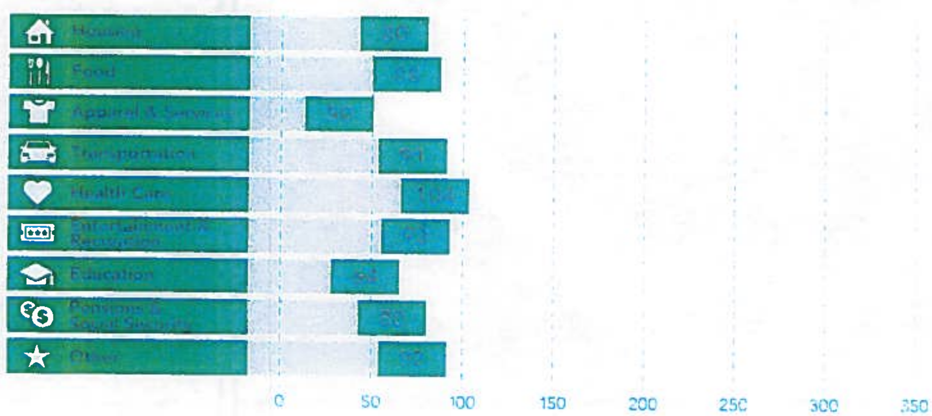


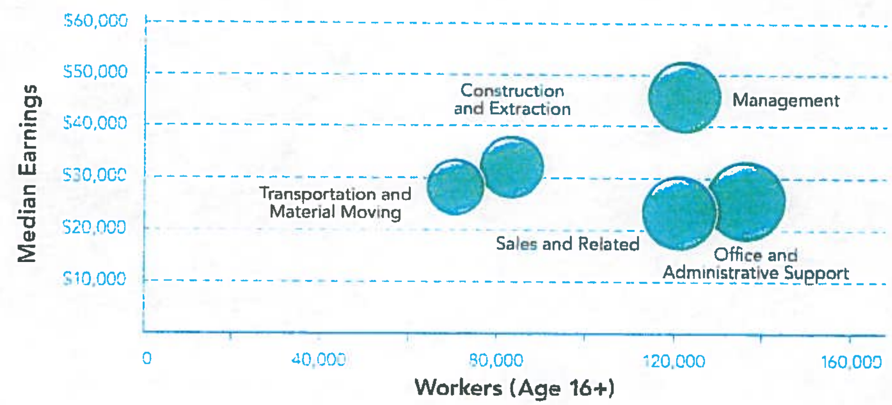
AVERAGE HOUSEHOLD BUDGET INDEX

The index compares the average amount spent in this market's household budgets for housing, food, apparel, etc., to the average amount spent by all US households. An index of 100 is average. An index of 120 shows that average spending by consumers in this market is 20 percent above the national average. Consumer expenditures are estimated by Esri.



OCCUPATION BY EARNINGS

The five occupations with the highest number of workers in the market are displayed by median earnings. Data from the Census Bureau's American Community Survey.



LifeMode Group • Cozy Country Living

6F HEARTLAND COMMUNITIES

Well settled and close-knit, Heartland Communities are semi-rural and semiretired.

These older householders are primarily homeowners, and many have paid off their mortgages. Their children have moved away, but they have no plans to leave their homes. Their hearts are with the country; they embrace the slower pace of life here but actively participate in outdoor activities and community events. Traditional and patriotic, these residents support their local businesses, always buy American, and favor domestic driving vacations over foreign plane trips.

US Household // 2,864,000
Average Household Size // 2.38
Median Age // 41.5
Median Household Income // $39,000

+ OUR NEIGHBORHOOD

- Rural communities or small towns are concentrated in the Midwest, from older Rustbelt cities to the Great Plains.
- Distribution of household types is comparable to the US, primarily (but not the majority) married couples, more with no children, and a slightly higher proportion of singles (Index 112) that reflects the aging of the population.
- Residents own modest, single-family homes built before 1970.
- They own one or two vehicles; commutes are short (Index 95).

+ MARKET PROFILE

(Consumer preferences are estimated from data by GfK MRI)

- Traditional in their ways, residents of Heartland Communities choose to bank and pay their bills in person and purchase insurance from an agent.
- Most have high-speed Internet access at home or on their cell phone but aren't ready to go paperless.
- Many residents have paid off their home mortgages but still hold auto loans and student loans. Noninterest checking accounts are common.
- To support their local community, residents participate in public activities.
- Home remodeling is not a priority, but homeowners do tackle necessary maintenance work on their cherished homes. They have invested in riding lawn mowers to maintain their larger yards.
- They enjoy country music and watch CMT.
- Motorcycling, hunting, and fishing are popular; walking is the main form of exercise.
- To get around these semirural communities, residents prefer domestic trucks or SUVs.
- They prefer to travel in the US and favor the convenience of packaged deals.

+ SOCIOECONOMIC TRAITS

- Retirees in this market depress the average labor force participation rate to less than 60% (Index 95), but the unemployment rate is comparable to the US.
- More workers are white collar than blue collar; more skilled than unskilled.
- The rural economy of this market provides employment in the manufacturing, construction, and agriculture industries.
- These are budget savvy consumers; they stick to brands they grew up with and know the price of goods they purchase. Buying American is important.
- Daily life is busy, but routine. Working on the weekends is not uncommon.
- Residents trust TV and newspapers more than any other media.
- Skeptical about their financial future, they stick to community banks and low-risk investments.

+ HOUSING

Median home value is displayed for markets that are primarily owner occupied; average rent is shown for renter-occupied markets. Tenure and home value are estimated by Esri. Housing type and average rent are from the Census Bureau's American Community Survey.

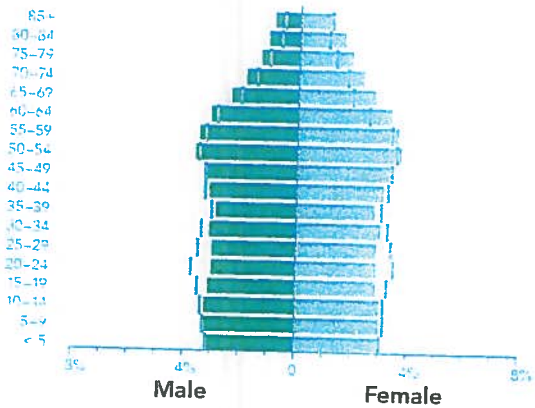
Typical Housing:
Single Family
Median Value:
$89,000
US Median: $177,000

6F HEARTLAND COMMUNITES LifeMode Group • Cozy Country Living

AGE BY SEX (Esri data)

Median Age: 41.5 US: 37.6

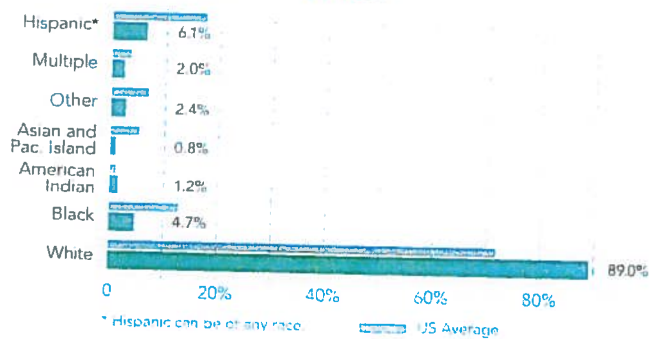
| Indicates US



RACE AND ETHNICITY (Esri data)

The Diversity Index summarizes racial and ethnic diversity. The index shows the likelihood that two persons, chosen at random from the same area, belong to different race or ethnic groups. The index ranges from 0 (no diversity) to 100 (complete diversity).

Diversity Index: 29.6 US: 62.1



INCOME AND NET WORTH

Net worth measures total household assets (homes, vehicles, investments, etc.) less any debts, secured (e.g., mortgages) or unsecured (credit cards). Household income and net worth are estimated by Esri.

Median Household Income

Median Net Worth

AVERAGE HOUSEHOLD BUDGET INDEX

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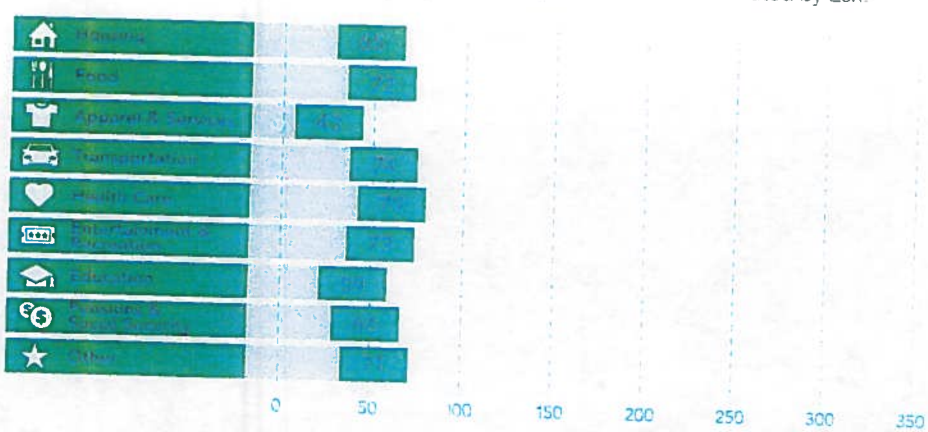
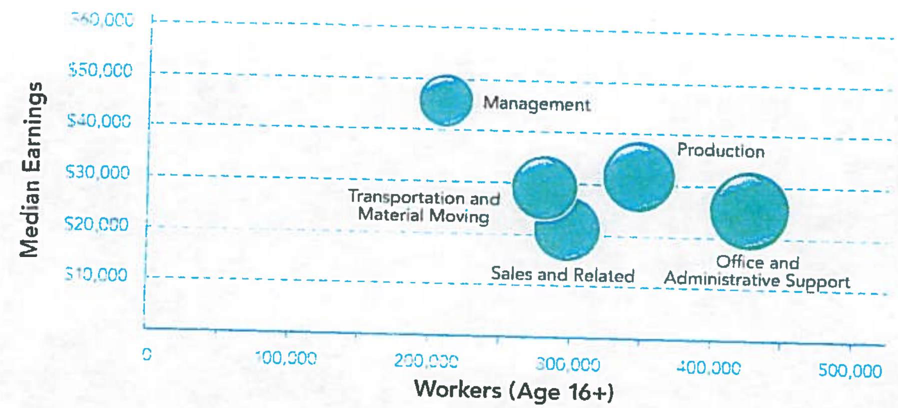
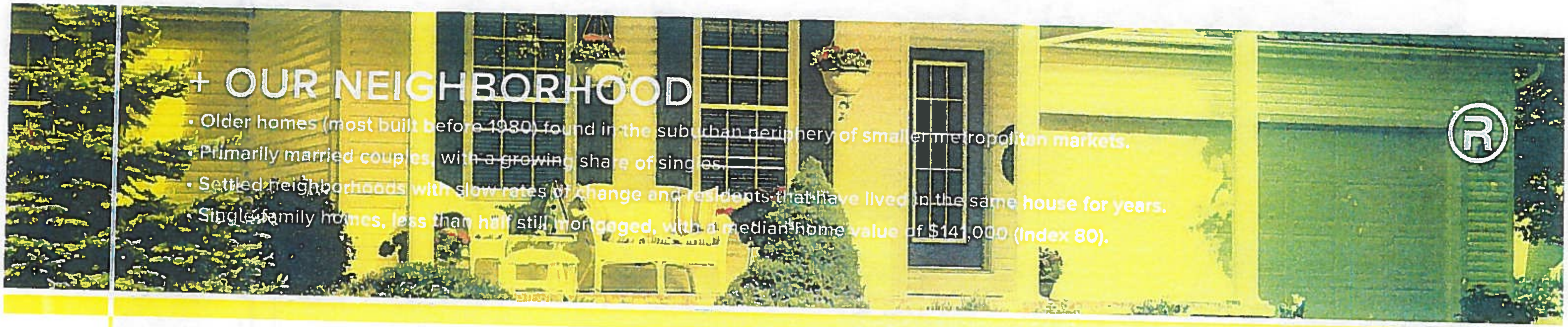


OCCUPATION BY EARNINGS

The five occupations with the highest number of workers in the market are displayed by median earnings. Data from the Census Bureau's American Community Survey.




LifeMode Group • GenXurban
5E MIDLIFE CONSTANTS
Midlife Constants residents are seniors, at or approaching retirement, with below average labor force participation and above average net worth.
Although located in predominantly metropolitan areas, they live outside the central cities, in smaller communities. Their lifestyle is more country than urban. They are generous, but not spendthrifts.
US Household // 3,043,000
Average Household Size // 2.30
Median Age // 45.9
Median Household Income // $48,000



+ OUR NEIGHBORHOOD

- Older homes (most built before 1980) found in the suburban periphery of smaller metropolitan markets.
- Primarily married couples, with a growing share of singles.
- Settled neighborhoods with slow rates of change and residents that have lived in the same house for years.
- Single-family homes, less than half still mortgaged, with a median home value of $141,000 (Index 80).

5E

+ MARKET PROFILE

(Consumer preferences are estimated from data by GfK MRI)

- Prefer practical vehicles like SUVs and trucks (domestic, of course).
- Sociable, church-going residents belonging to fraternal orders, veterans' clubs and charitable organizations and do volunteer work and fund-raising.
- Contribute to arts/cultural, educational, political, and social services organizations.
- DIY homebodies that spend on home improvement and gardening.
- Media preferences: country or Christian channels.
- Leisure activities include scrapbooking, movies at home, reading, fishing, and golf.

+ SOCIOECONOMIC TRAITS

- Education: 64% have a high school diploma or some college.
- Unemployment is lower in this market at 7.4% (Index 86), but so is the labor force participation rate (Index 89).
- Almost 42% of households are receiving Social Security (Index 150); 28% also receive retirement income (Index 160).
- Traditional, not trendy: opt for convenience and comfort, not cutting-edge. Technology has its uses, but the bells and whistles are a bother.
- Attentive to price, but not at the expense of quality, they prefer to buy American and natural products.
- Radio and newspapers are the media of choice (after television).

+ HOUSING

Median home value is displayed for markets that are primarily owner occupied; average rent is shown for renter-occupied markets. Tenure and home value are estimated by Esri. Housing type and average rent are from the Census Bureau's American Community Survey.

Single Family

$141,000

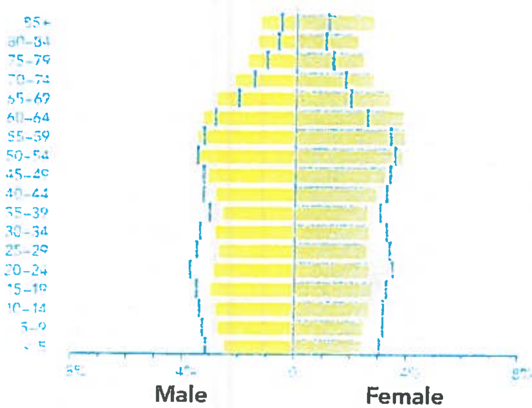
US Median $177,000

5E MIDLIFE CONSTANTS LifeMode Group • GenXurban

AGE BY SEX (Esri data)

Median Age: 45.9 US: 37.6

| Indicates US



RACE AND ETHNICITY (Esri data)

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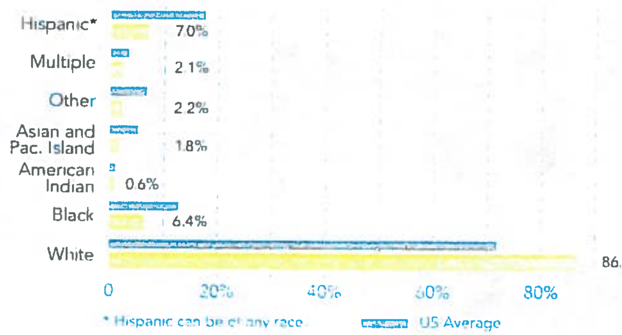
Diversity Index: 34.5 US: 62.1



INCOME AND NET WORTH

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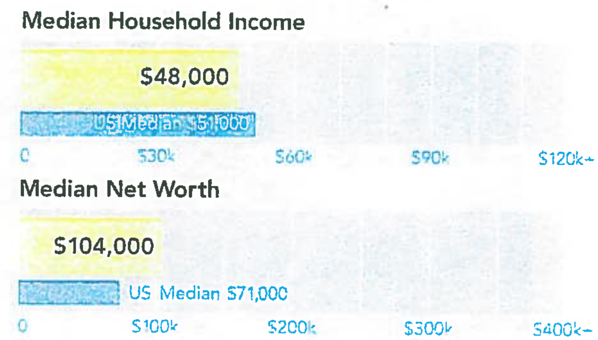

AVERAGE HOUSEHOLD BUDGET INDEX

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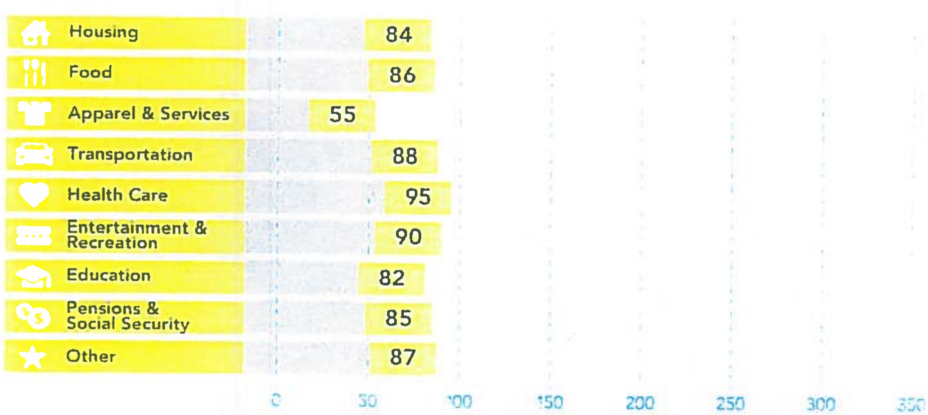

OCCUPATION BY EARNINGS

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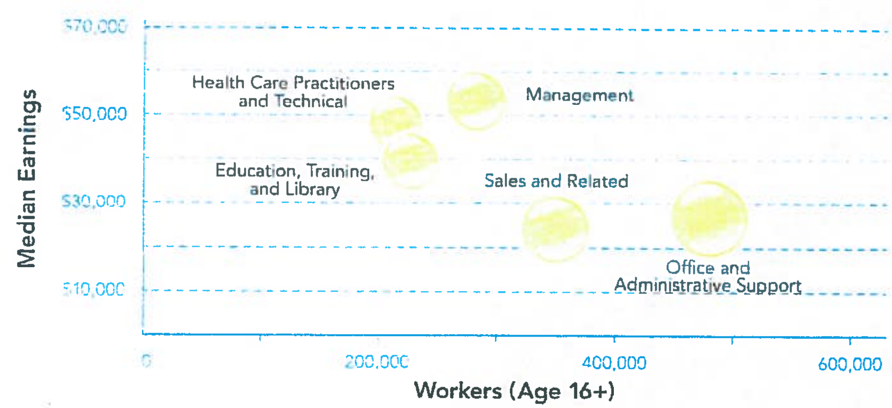
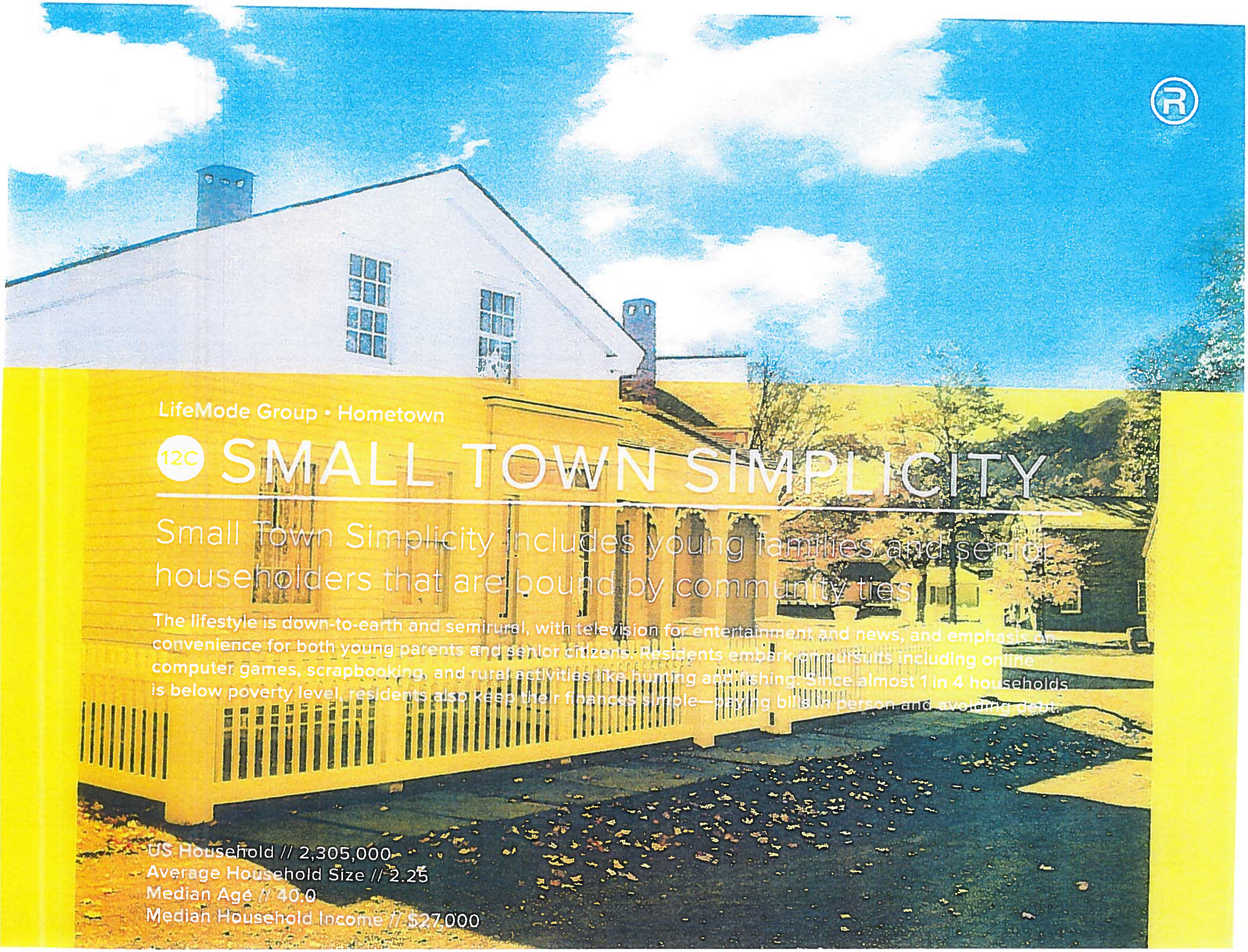




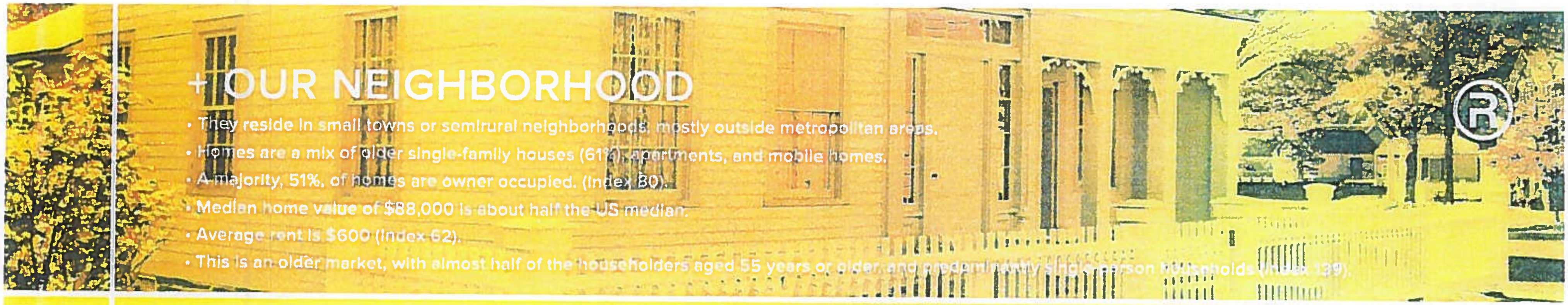
LifeMode Group • Hometown

12C SMALL TOWN SIMPLICITY

Small Town Simplicity includes young families and senior householders that are bound by community ties.

The lifestyle is down-to-earth and semirural, with television for entertainment and news, and emphasis on convenience for both young parents and senior citizens. Residents embark on pursuits including online computer games, scrapbooking, and rural activities like hunting and fishing. Since almost 1 in 4 households is below poverty level, residents also keep their finances simple—paying bills in person and avoiding debt.

US Household // 2,305,000
Average Household Size // 2.25
Median Age // 40.0
Median Household Income // $27,000



+ OUR NEIGHBORHOOD

- They reside in small towns or semirural neighborhoods, mostly outside metropolitan areas.
- Homes are a mix of older single-family houses (61%), apartments, and mobile homes.
- A majority, 51%, of homes are owner occupied. (Index 80).
- Median home value of $88,000 is about half the US median.
- Average rent is $600 (Index 62).
- This is an older market, with almost half of the householders aged 55 years or older, and predominantly single-person households (Index 139).

12C

+ MARKET PROFILE

(Consumer preferences are estimated from data by GfK MRI)

- Small Town Simplicity features a semirural lifestyle, complete with trucks (domestic, of course), ATVs, and vegetable gardens.
- Hunting, fishing, and target shooting are favorite pastimes.
- A large senior population visit doctors and health practitioners regularly.
- However, a largely single population favors convenience over cooking—frozen meals and fast food.
- Home improvement is not a priority, but vehicle maintenance is.

+ SOCIOECONOMIC TRAITS

- Education: 65% with high school diploma or some college.
- Unemployment higher at 11.9% (Index 138).
- Labor force participation lower at 51% (Index 81), which could result from lack of jobs or retirement.
- Income from wages and salaries (Index 82), Social Security (Index 142) or retirement (Index 112), increased by Supplemental Security Income (Index 203).
- Price-conscious consumers that shop accordingly, with coupons at discount centers.
- Connected, but not to the latest or greatest gadgets; keep their landlines.
- Community-orientated residents; more conservative than middle-of-the-road.
- Rely on television or newspapers to stay informed.

+ HOUSING

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Single Family

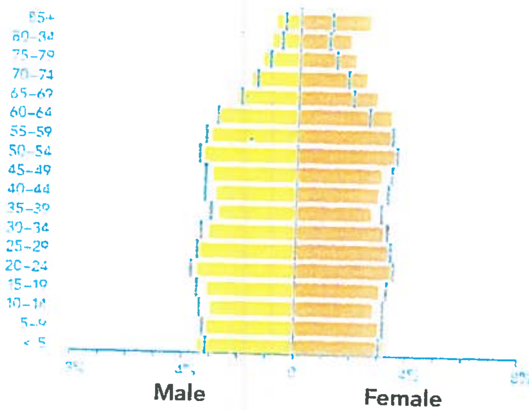
$88,000

US Median: $177,000

AGE BY SEX (Esri data)

Median Age: 40.0 US: 37.6

| Indicates US



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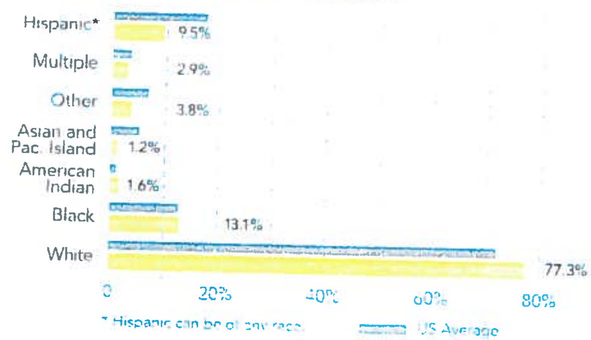
Diversity Index: [illegible] US: 62.1



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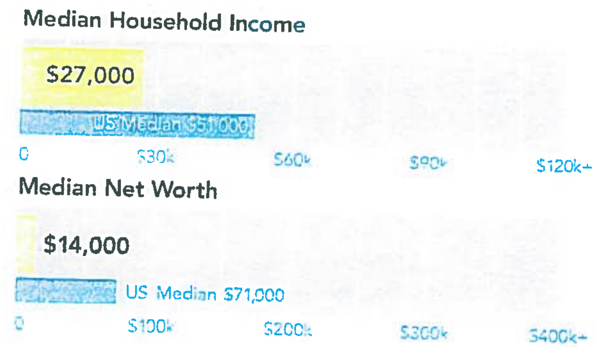
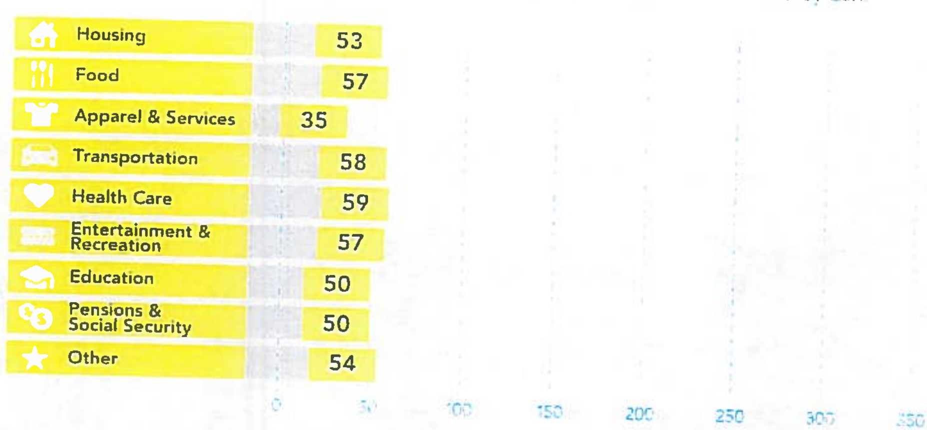


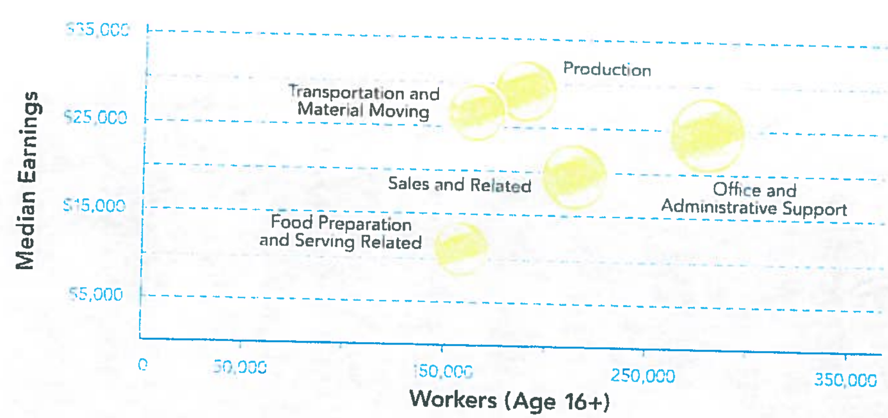
AVERAGE HOUSEHOLD BUDGET INDEX

The index compares the average amount spent in this market's household budgets for housing, food, apparel, etc., to the average amount spent by all US households. An index of 100 is average. An index of 120 shows that average spending by consumers in this market is 20 percent above the national average. Consumer expenditures are estimated by Esri.

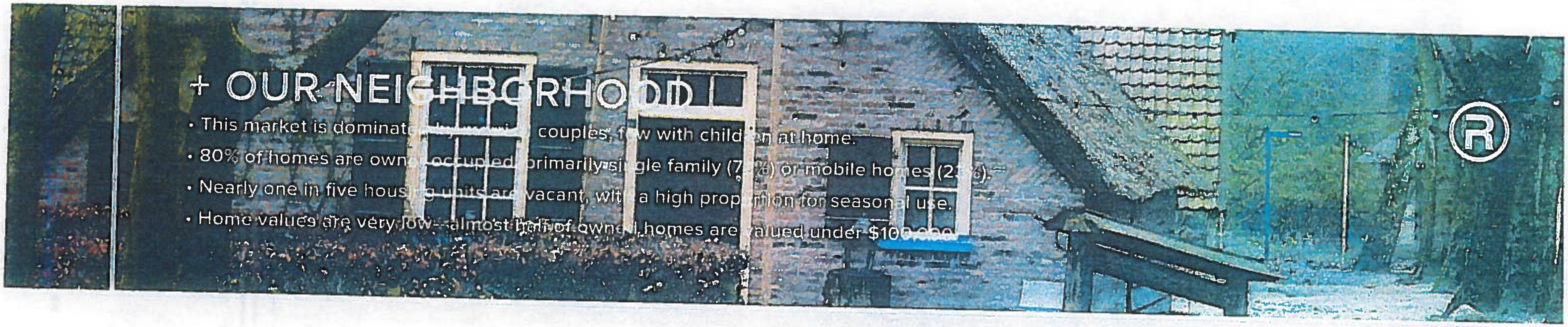


OCCUPATION BY EARNINGS

The five occupations with the highest number of workers in the market are displayed by median earnings. Data from the Census Bureau's American Community Survey.




LifeMode Group • Rustic Outposts
ROOTED RURAL
Rooted Rural is heavily concentrated in the Appalachian mountain range as well as in Texas and Arkansas.
Employment in the forestry industry is common, and Rooted Rural residents live in many of the heavily forested regions of the country. Nearly [illegible] residents are non-Hispanic whites. This group enjoys time spent outdoors, [illegible] fishing, or working in their gardens. Indoors, they enjoy watching television with a spouse and spending time with their pets. When shopping, they look for American-made and generic products. These communities are heavily influenced by religious faith, traditional gender roles, and family history.
US Household // 2,425,000
Average Household Size // 2.47
Median Age // 44.1
Median Household Income // $38,000



+ OUR NEIGHBORHOOD

- This market is dominat[illegible] couples, few with children at home.
- 80% of homes are owner occupied: primarily single family (7[illegible]%) or mobile homes (2[illegible]%).
- Nearly one in five housing units are vacant, with a high proportion for seasonal use.
- Home values are very low—almost half of owned homes are valued under $100,000.

(Consumer preferences are estimated from data by GfK MRI)

- They own a riding lawn mower, as well as a garden tiller, and have vegetable gardens.
- Only half of the households have a high-speed Internet connection.
- They use a satellite dish to watch CMT, the History Channel, and GSN (Game Show Network).
- Pets are popular—dogs, cats, and birds.
- Leisure activities include hunting and fishing.
- They listen to faith-based radio and gospel music.
- Many are on Medicare and frequent the Walmart pharmacy.
- Thrifty shoppers that use coupons frequently and buy generic goods.
- Far-right political values on religion and marriage.
- Do-it-yourself mentality; grow their own produce and work on their cars and ATVs.
- Pay bills in person and avoid using the Internet for financial transactions.
- Often find computers and cell phones too complicated and confusing.
- Clothes a necessity, not a fashion statement; only buy new clothes when old clothes wear out.

Median home value is displayed for markets that are primarily owner occupied; average rent is shown for renter-occupied markets. Tenure and home value are estimated by Esri. Housing type and average rent are from the Census Bureau's American Community Survey.

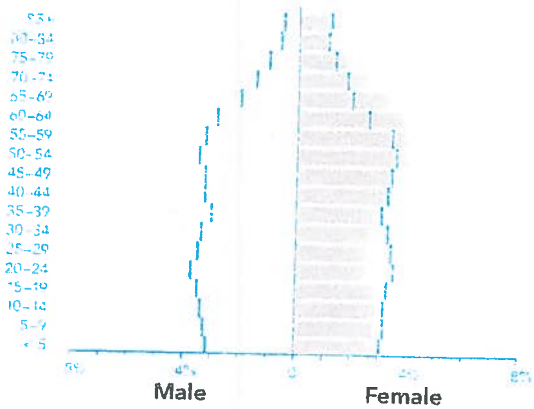
Single Family;
Mobile Homes

$104,000
US Median: $177,000

AGE BY SEX (Esri data)

Median Age: US: 37.6

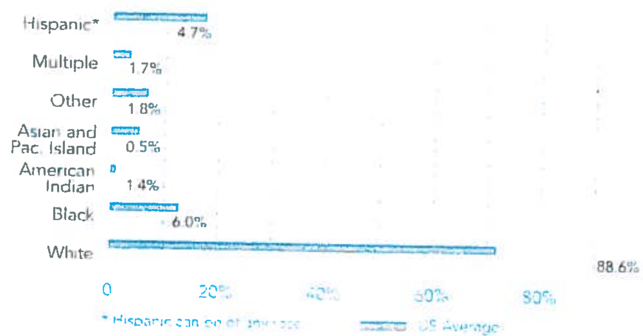
Indicates US



RACE AND ETHNICITY (Esri data)

The Diversity Index summarizes racial and ethnic diversity. The index shows the likelihood that two persons, chosen at random from the same area, belong to different race or ethnic groups. The index ranges from 0 (no diversity) to 100 (complete diversity).

Diversity Index: US: 62.1



INCOME AND NET WORTH

Net worth measures total household assets (homes, vehicles, investments, etc.) less any debts, secured (e.g., mortgages) or unsecured (credit cards). Household income and net worth are estimated by Esri.

Median Household Income

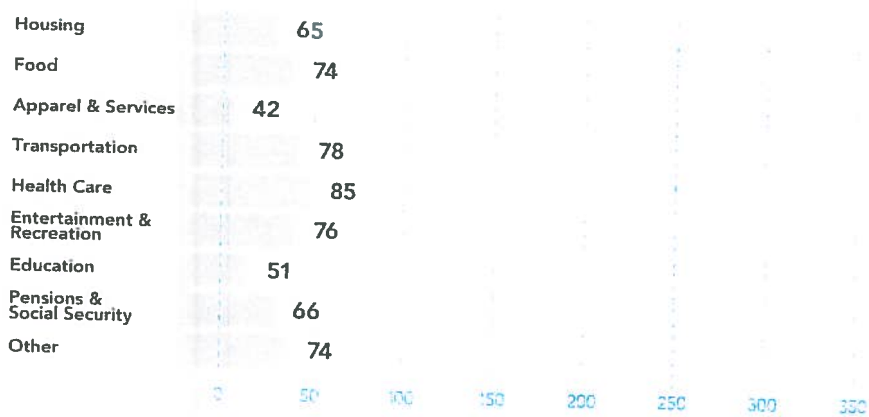
$38,000

Median Net Worth

$72,000

AVERAGE HOUSEHOLD BUDGET INDEX

The index compares the average amount spent in this market's household budgets for housing, food, apparel, etc., to the average amount spent by all US households. An index of 100 is average. An index of 120 shows that average spending by consumers in this market is 20 percent above the national average. Consumer expenditures are estimated by Esri.



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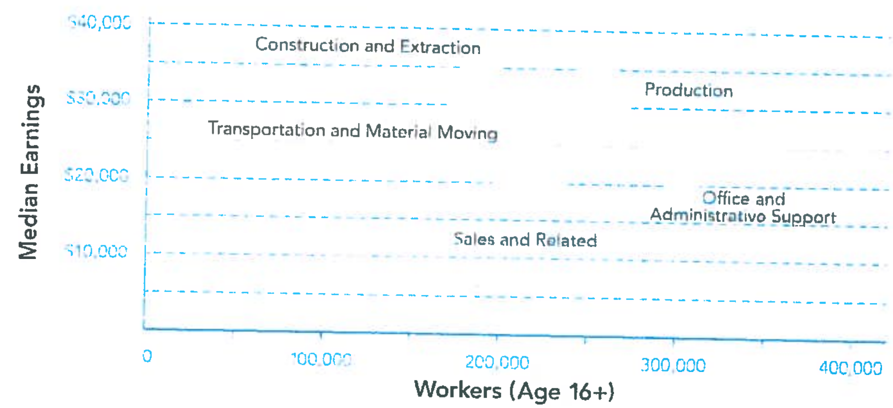

Retail Market Profile 2015

Contact Information

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July 2015. All information furnished is from sources deemed reliable and is submitted subject to errors, omissions, change of terms and/or conditions. Prepared by The Retail Coach, LLC, a national retail consulting and market research firm. 800.851.0962.

Population

	2000	2010	2015 ESTIMATE	2020 PROJECTION
Secondary Retail Trade Area	25,841	26,225	26,692	27,487

Income

	2015 ESTIMATE
Average Household	$65,082
Median Household	$42,534
Per Capita	$27,478

Educational Attainment

	2015 ESTIMATE
Graduate or Professional	5.84%
Bachelor's Degree	13.13%
Associate Degree	4.50%
Some College, No Degree	21.46%
High School Graduate	34.90%
Some High School, No Degree	8.86%
Less than 9th Grade	11.32%

Race Distribution

	2015 ESTIMATE
White	84.39%
Black or African American	2.56%
American Indian/ Alaskan	0.71%
Asian	0.44%
Native Hawaiian/ Islander	0.03%
Other Race	9.89%
Two or More Races	1.96%
Hispanic or Latino (of any race)	32.49%

Age

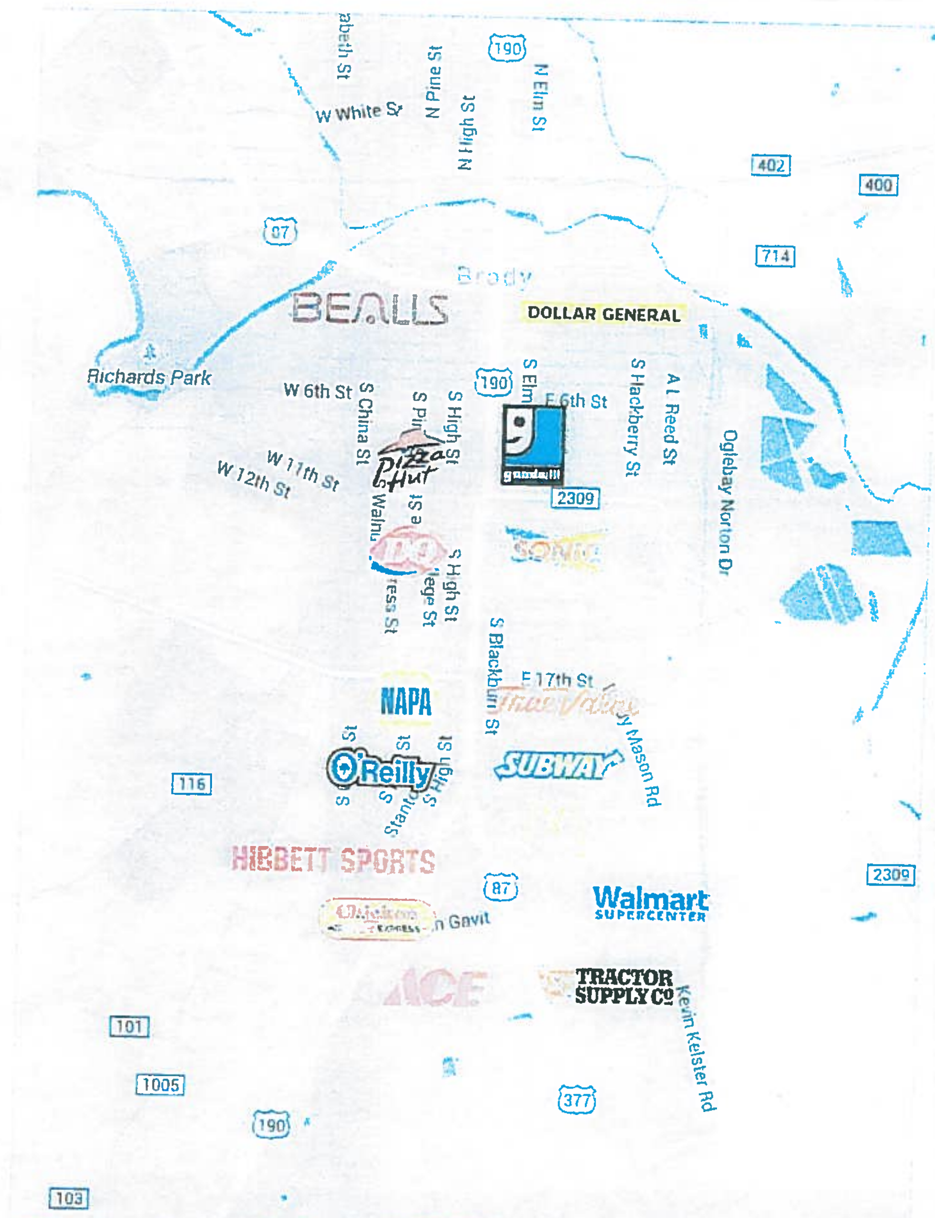
GROUPS	2015 ESTIMATE
9 Years and Under	10.52%
10-17 Years	9.30%
18-24 Years	8.10%
25-34 Years	11.41%
35-44 Years	11.04%
45-54 Years	12.31%
55-64 Years	14.51%
65 Years and Over	22.82%

DISTRIBUTION	2015 ESTIMATE
Median Age	44.7
Average Age	43.4

TheRetailCoach

LOCATION MAP

EXISTING RETAIL



Information provided is for illustrative purposes only and is deemed to be correct as of publish date of this document
Data sources used may include: ESRI, AGS, Nielsen, RegisPro, SitesUSA, TxDOT and/or Microsoft Corporation.

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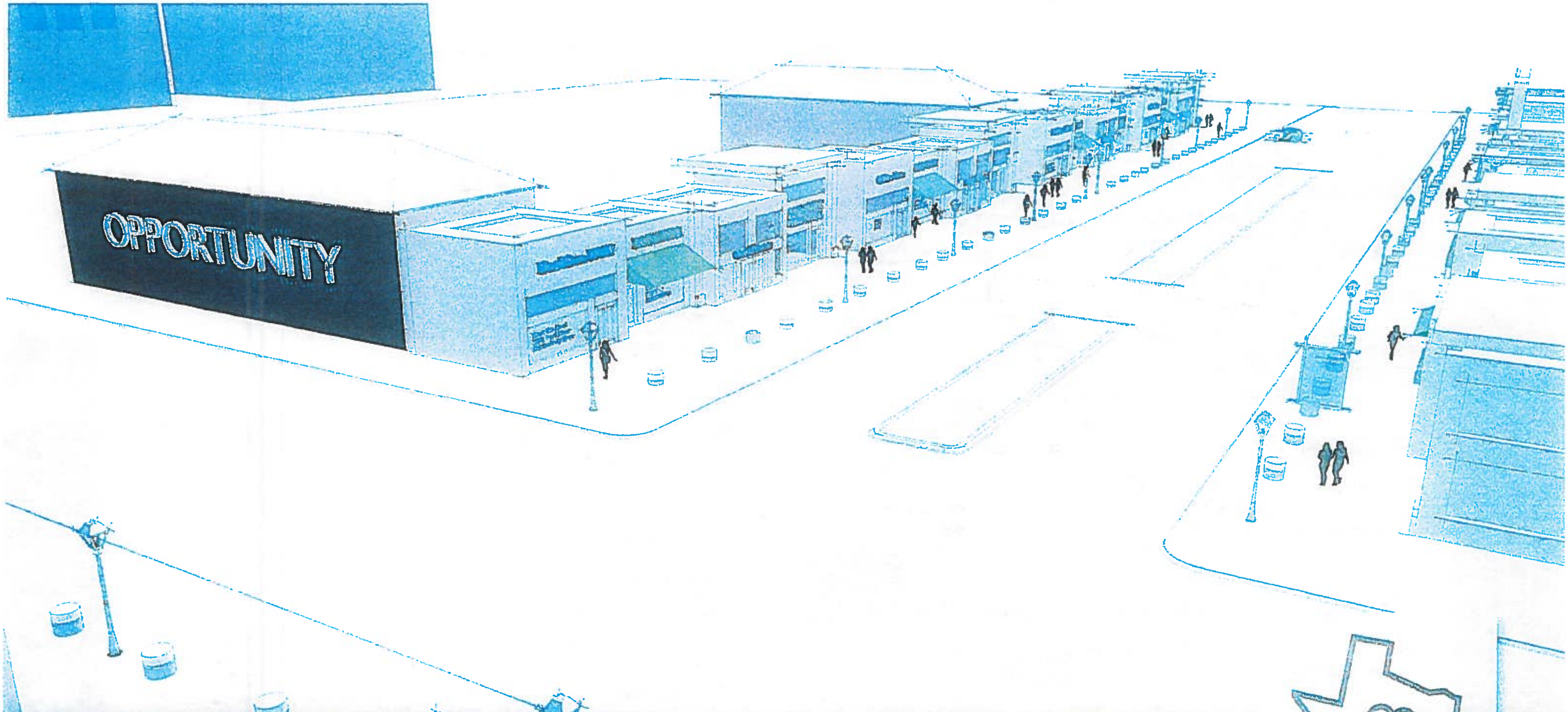


SECONDARY RETAIL TRADE AREA DEMOGRAPHIC PROFILE

Brady, Texas

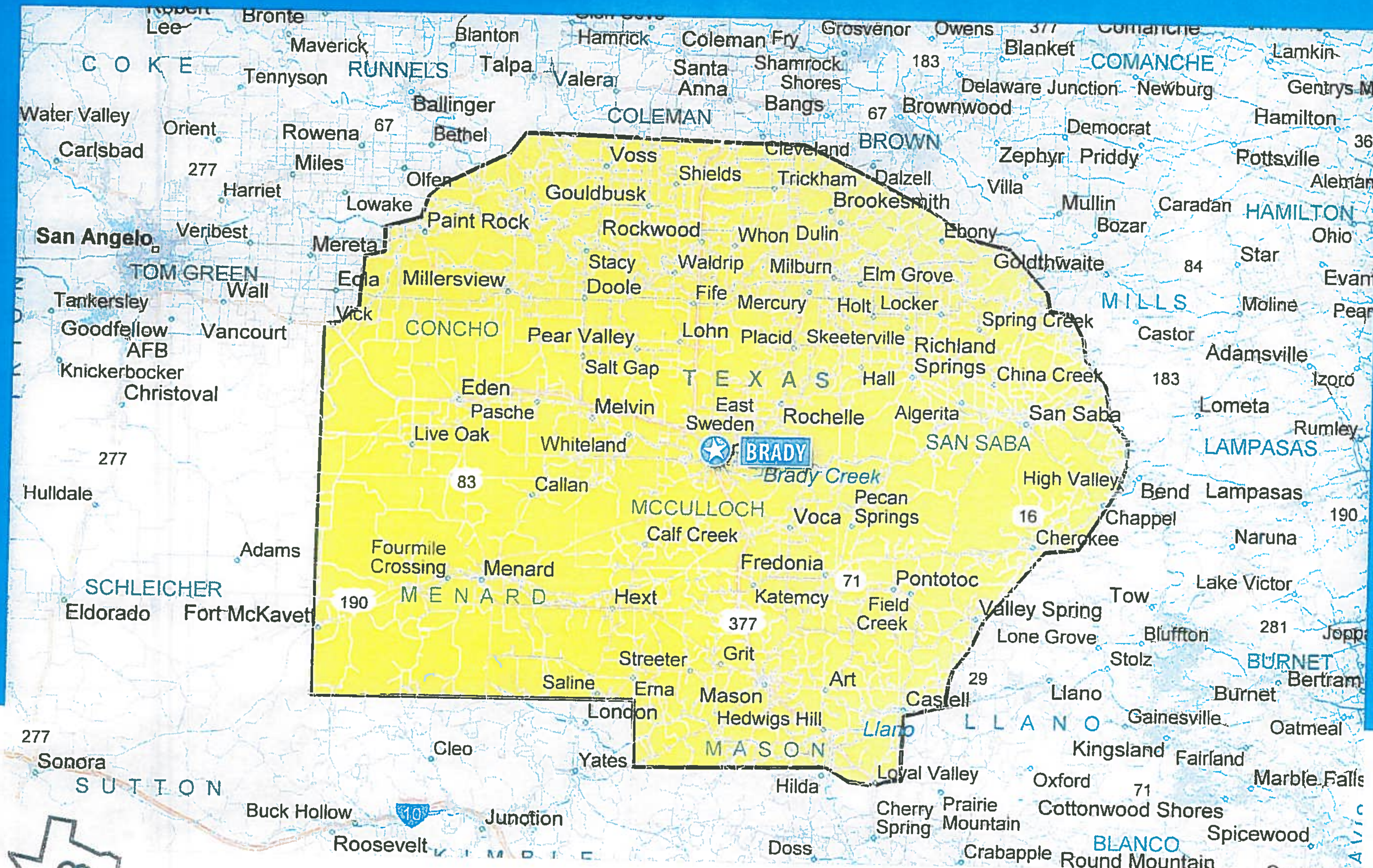
BRADY THE TRUE HEART OF TEXAS

Prepared for
City of Brady
July 2015

TheRetailCoach®

Secondary Retail Trade Area

Brady, Texas



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Secondary Retail Trade Area | Demographics

Brady, Texas

DESCRIPTION	DATA	%
Population		
2020 Projection	27,487	
2015 Estimate	26,692	
2010 Census	26,225	
2000 Census	25,841	
Growth 2015-2020	2.98%	
Growth 2010-2015	1.78%	
Growth 2000-2010	1.49%	
2015 Est. Population by Single-Classification Race	26,692	
White Alone	22,526	84.39
Black or African American Alone	684	2.56
Amer. Indian and Alaska Native Alone	190	0.71
Asian Alone	118	0.44
Native Hawaiian and Other Pac. Isl. Alone	9	0.03
Some Other Race Alone	2,641	9.89
Two or More Races	524	1.96
2015 Est. Population by Hispanic or Latino Origin	26,692	
Not Hispanic or Latino	18,019	67.51
Hispanic or Latino:	8,673	32.49
Mexican	7,576	87.35
Puerto Rican	55	0.63
Cuban	34	0.39
All Other Hispanic or Latino	1,008	11.62

DESCRIPTION	DATA	%
2015 Est. Hisp. or Latino Pop by Single-Class. Race	8,673	
White Alone	5,600	64.57
Black or African American Alone	72	0.83
American Indian and Alaska Native Alone	80	0.92
Asian Alone	1	0.01
Native Hawaiian and Other Pacific Islander Alone	0	0.00
Some Other Race Alone	2,625	30.27
Two or More Races	295	3.40
2015 Est. Pop by Race, Asian Alone, by Category	118	
Chinese, except Taiwanese	7	5.93
Filipino	4	3.39
Japanese	3	2.54
Asian Indian	20	16.95
Korean	1	0.85
Vietnamese	26	22.03
Cambodian	0	0.00
Hmong	0	0.00
Laotian	0	0.00
Thai	2	1.69
All Other Asian Races Including 2+ Category	53	44.92
2015 Est. Population by Ancestry	26,692	
Arab	0	0.00
Czech	53	0.20
Danish	2	0.01
Dutch	200	0.75
English	1,886	7.07
French (except Basque)	281	1.05
French Canadian	3	0.01
German	3,077	11.53
Greek	4	0.01

Secondary Retail Trade Area | Demographics
Brady, Texas

DESCRIPTION	DATA	%
Hungarian	0	0.00
Irish	1,533	5.74
Italian	178	0.67
Lithuanian	0	0.00
United States or American	4,908	18.39
Norwegian	72	0.27
Polish	44	0.16
Portuguese	0	0.00
Russian	47	0.18
Scottish	263	0.99
Scotch-Irish	471	1.76
Slovak	0	0.00
Subsaharan African	11	0.04
Swedish	177	0.66
Swiss	51	0.19
Ukrainian	0	0.00
Welsh	67	0.25
West Indian (except Hisp. groups)	12	0.04
Other ancestries	9,025	33.81
Ancestry Unclassified	4,327	16.21
2015 Est. Pop Age 5+ by Language Spoken at Home	25,306	
Speak Only English at Home	19,526	77.16
Speak Asian/Pac. Isl. Lang. at Home	75	0.30
Speak IndoEuropean Language at Home	185	0.73
Speak Spanish at Home	5,520	21.81
Speak Other Language at Home	0	0.00
2015 Est. Population by Sex	26,692	
Male	14,400	53.95
Female	12,292	46.05

DESCRIPTION	DATA	%
2015 Est. Population by Age	26,692	
Age 0 - 4	1,386	5.19
Age 5 - 9	1,421	5.32
Age 10 - 14	1,509	5.65
Age 15 - 17	974	3.65
Age 18 - 20	916	3.43
Age 21 - 24	1,246	4.67
Age 25 - 34	3,046	11.41
Age 35 - 44	2,946	11.04
Age 45 - 54	3,286	12.31
Age 55 - 64	3,873	14.51
Age 65 - 74	3,486	13.06
Age 75 - 84	1,855	6.95
Age 85 and over	749	2.81
Age 16 and over	22,061	82.65
Age 18 and over	21,401	80.18
Age 21 and over	20,486	76.75
Age 65 and over	6,090	22.82
2015 Est. Median Age	44.7	
2015 Est. Average Age	43.4	

Secondary Retail Trade Area | Demographics
Brady, Texas

DESCRIPTION	DATA	%
2015 Est. Male Population by Age	14,400	
Age 0 - 4	717	4.98
Age 5 - 9	748	5.19
Age 10 - 14	790	5.49
Age 15 - 17	509	3.53
Age 18 - 20	519	3.60
Age 21 - 24	767	5.33
Age 25 - 34	1,999	13.88
Age 35 - 44	1,749	12.15
Age 45 - 54	1,771	12.30
Age 55 - 64	1,938	13.46
Age 65 - 74	1,760	12.22
Age 75 - 84	848	5.89
Age 85 and over	286	1.99
2015 Est. Median Age, Male	41.6	
2015 Est. Average Age, Male	41.9	
2015 Est. Female Population by Age	12,292	
Age 0 - 4	669	5.44
Age 5 - 9	673	5.48
Age 10 - 14	719	5.85
Age 15 - 17	465	3.78
Age 18 - 20	397	3.23
Age 21 - 24	479	3.90
Age 25 - 34	1,047	8.52
Age 35 - 44	1,196	9.73
Age 45 - 54	1,515	12.33
Age 55 - 64	1,934	15.73
Age 65 - 74	1,726	14.04
Age 75 - 84	1,007	8.19
Age 85 and over	463	3.77

DESCRIPTION	DATA	%
2015 Est. Median Age, Female	48.3	
2015 Est. Average Age, Female	45.2	
2015 Est. Pop Age 15+ by Marital Status	22,375	
Total, Never Married	5,123	22.90
Males, Never Married	3,616	16.16
Females, Never Married	1,507	6.74
Married, Spouse present	10,636	47.54
Married, Spouse absent	1,662	7.43
Widowed	2,082	9.31
Males Widowed	414	1.85
Females Widowed	1,668	7.45
Divorced	2,872	12.84
Males Divorced	1,573	7.03
Females Divorced	1,299	5.81
2015 Est. Pop Age 25+ by Edu. Attainment	19,240	
Less than 9th grade	2,178	11.32
Some High School, no diploma	1,704	8.86
High School Graduate (or GED)	6,715	34.90
Some College, no degree	4,129	21.46
Associate Degree	866	4.50
Bachelor's Degree	2,526	13.13
Master's Degree	857	4.45
Professional School Degree	173	0.90
Doctorate Degree	94	0.49
2015 Est. Pop Age 25+ by Edu. Attain., Hisp./Lat.	5,452	
No High School Diploma	2,283	41.87
High School Graduate	2,014	36.94
Some College or Associate's Degree	899	16.49
Bachelor's Degree or Higher	256	4.70

Secondary Retail Trade Area | Demographics

Brady, Texas

DESCRIPTION	DATA	%
Households		
2020 Projection	10,536	
2015 Estimate	10,193	
2010 Census	9,968	
2000 Census	9,725	
Growth 2015-2020	3.36%	
Growth 2010-2015	2.26%	
Growth 2000-2010	2.50%	
2015 Est. Households by Household Type	10,193	
Family Households	6,990	68.58
Nonfamily Households	3,203	31.42
2015 Est. Group Quarters Population	2,550	
2015 HHs by Ethnicity, Hispanic/Latino	2,267	22.24
2015 Est. Households by HH Income	10,193	
Income < $15,000	1,564	15.34
Income $15,000 - $24,999	1,395	13.69
Income $25,000 - $34,999	1,264	12.40
Income $35,000 - $49,999	1,741	17.08
Income $50,000 - $74,999	1,565	15.35
Income $75,000 - $99,999	975	9.57
Income $100,000 - $124,999	686	6.73
Income $125,000 - $149,999	317	3.11
Income $150,000 - $199,999	233	2.29
Income $200,000 - $249,999	120	1.18
Income $250,000 - $499,999	168	1.65
Income $500,000+	167	1.64

DESCRIPTION	DATA	%
2015 Est. Average Household Income	$65,082	
2015 Est. Median Household Income	$42,534	
2015 Median HH Inc. by Single-Class. Race or Eth.		
White Alone	44,314	
Black or African American Alone	38,086	
American Indian and Alaska Native Alone	36,249	
Asian Alone	54,554	
Native Hawaiian and Other Pacific Islander Alone	74,285	
Some Other Race Alone	33,037	
Two or More Races	24,677	
Hispanic or Latino	33,760	
Not Hispanic or Latino	45,495	
2015 Est. Family HH Type by Presence of Own Child.	6,990	
Married-Couple Family, own children	1,630	23.32
Married-Couple Family, no own children	3,929	56.21
Male Householder, own children	258	3.69
Male Householder, no own children	220	3.15
Female Householder, own children	527	7.54
Female Householder, no own children	426	6.09
2015 Est. Households by Household Size	10,193	
1-person	2,930	28.75
2-person	3,987	39.12
3-person	1,373	13.47
4-person	985	9.66
5-person	559	5.48
6-person	229	2.25
7-or-more-person	131	1.29

Secondary Retail Trade Area | Demographics
Brady, Texas

DESCRIPTION	DATA	%
2015 Est. Average Household Size	2.37	
2015 Est. Households by Presence of People Under 18	10,193	
Households with 1 or More People under Age 18:	2,842	27.88
Married-Couple Family	1,874	65.94
Other Family, Male Householder	294	10.34
Other Family, Female Householder	648	22.80
Nonfamily, Male Householder	22	0.77
Nonfamily, Female Householder	5	0.18
Households with No People under Age 18:	7,351	72.12
Married-Couple Family	3,682	50.09
Other Family, Male Householder	183	2.49
Other Family, Female Householder	304	4.14
Nonfamily, Male Householder	1,543	20.99
Nonfamily, Female Householder	1,638	22.28
2015 Est. Households by Number of Vehicles	10,193	
No Vehicles	528	5.18
1 Vehicle	3,120	30.61
2 Vehicles	4,419	43.35
3 Vehicles	1,545	15.16
4 Vehicles	358	3.51
5 or more Vehicles	224	2.20
2015 Est. Average Number of Vehicles	1.9	

DESCRIPTION	DATA	%
Family Households		
2020 Projection	7,231	
2015 Estimate	6,990	
2010 Census	6,827	
2000 Census	6,789	
Growth 2015-2020	3.45%	
Growth 2010-2015	2.39%	
Growth 2000-2010	0.55%	
2015 Est. Families by Poverty Status	6,990	
2015 Families at or Above Poverty	6,050	86.55
2015 Families at or Above Poverty with Children	2,194	31.39
2015 Families Below Poverty	940	13.45
2015 Families Below Poverty with Children	700	10.01
2015 Est. Pop Age 16+ by Employment Status	22,061	
In Armed Forces	12	0.05
Civilian - Employed	10,916	49.48
Civilian - Unemployed	621	2.81
Not in Labor Force	10,512	47.65
2015 Est. Civ. Employed Pop 16+ by Class of Worker	10,967	
For-Profit Private Workers	5,859	53.42
Non-Profit Private Workers	489	4.46
Local Government Workers	1,336	12.18
State Government Workers	622	5.67
Federal Government Workers	212	1.93
Self-Employed Workers	2,394	21.83
Unpaid Family Workers	55	0.50

Secondary Retail Trade Area | Demographics

Brady, Texas

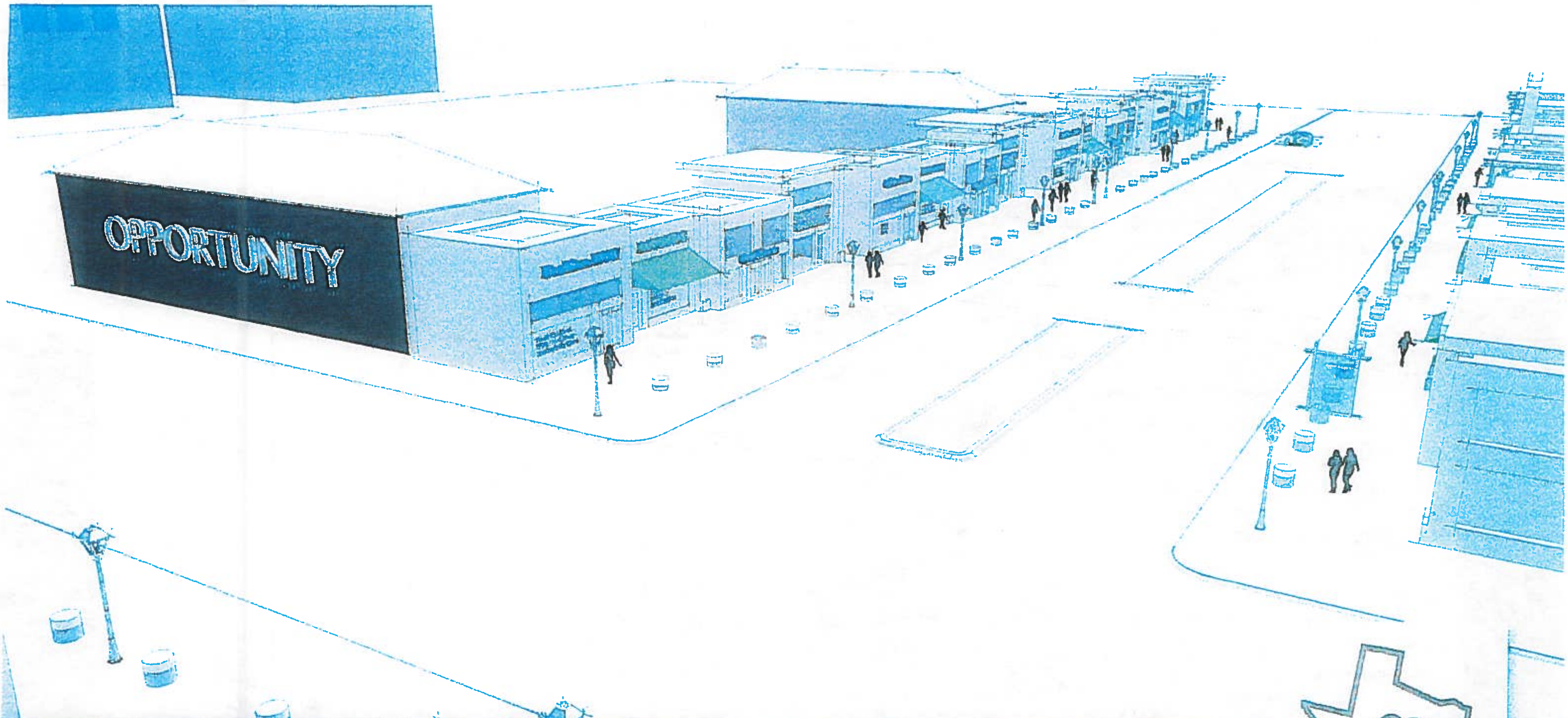
DESCRIPTION	DATA	%
2015 Est. Civ. Employed Pop 16+ by Occupation	10,967	
Architect/Engineer	76	0.69
Arts/Entertainment/Sports	94	0.86
Building Grounds Maintenance	408	3.72
Business/Financial Operations	256	2.33
Community/Social Services	173	1.58
Computer/Mathematical	106	0.97
Construction/Extraction	1,129	10.29
Education/Training/Library	822	7.50
Farming/Fishing/Forestry	479	4.37
Food Prep/Serving	712	6.49
Health Practitioner/Technician	374	3.41
Healthcare Support	152	1.39
Maintenance Repair	356	3.25
Legal	88	0.80
Life/Physical/Social Science	71	0.65
Management	1,225	11.17
Office/Admin. Support	1,294	11.80
Production	585	5.33
Protective Services	297	2.71
Sales/Related	1,064	9.70
Personal Care/Service	363	3.31
Transportation/Moving	843	7.69
2015 Est. Pop 16+ by Occupation Classification	10,967	
Blue Collar	2,913	26.56
White Collar	5,643	51.45
Service and Farm	2,412	21.99

DESCRIPTION	DATA	%
2015 Est. Workers Age 16+ by Transp. to Work	10,841	
Drove Alone	8,109	74.80
Car Pooled	1,509	13.92
Public Transportation	1	0.01
Walked	445	4.10
Bicycle	2	0.02
Other Means	168	1.55
Worked at Home	606	5.59
2015 Est. Workers Age 16+ by Travel Time to Work *		
Less than 15 Minutes	5,934	
15 - 29 Minutes	2,017	
30 - 44 Minutes	1,217	
45 - 59 Minutes	435	
60 or more Minutes	624	
2015 Est. Avg. Travel Time to Work in Minutes	19.90	
2015 Est. Occupied Housing Units by Tenure	10,193	
Owner Occupied	7,742	75.95
Renter Occupied	2,452	24.06
2015 Owner Occ. HUs: Avg. Length of Residence	17.9	
2015 Renter Occ. HUs: Avg. Length of Residence	8.5	

Secondary Retail Trade Area | Demographics
Brady, Texas

DESCRIPTION	DATA	%
2015 Est. Owner-Occupied Housing Units by Value	7,742	
Value Less than $20,000	517	6.68
Value $20,000 - $39,999	1,030	13.30
Value $40,000 - $59,999	979	12.65
Value $60,000 - $79,999	1,013	13.08
Value $80,000 - $99,999	773	9.98
Value $100,000 - $149,999	1,053	13.60
Value $150,000 - $199,999	736	9.51
Value $200,000 - $299,999	597	7.71
Value $300,000 - $399,999	322	4.16
Value $400,000 - $499,999	186	2.40
Value $500,000 - $749,999	245	3.16
Value $750,000 - $999,999	124	1.60
Value $1,000,000 or more	165	2.13
2015 Est. Median All Owner-Occupied Housing Value	$88,562	
2015 Est. Housing Units by Units in Structure	14,561	
1 Unit Attached	137	0.94
1 Unit Detached	11,923	81.88
2 Units	401	2.75
3 or 4 Units	86	0.59
5 to 19 Units	146	1.00
20 to 49 Units	35	0.24
50 or More Units	2	0.01
Mobile Home or Trailer	1,829	12.56
Boat, RV, Van, etc.	2	0.01

DESCRIPTION	DATA	%
2015 Est. Housing Units by Year Structure Built	14,561	
Housing Units Built 2010 or later	325	2.23
Housing Units Built 2000 to 2009	1,282	8.80
Housing Units Built 1990 to 1999	1,677	11.52
Housing Units Built 1980 to 1989	1,706	11.72
Housing Units Built 1970 to 1979	1,946	13.36
Housing Units Built 1960 to 1969	1,688	11.59
Housing Units Built 1950 to 1959	1,737	11.93
Housing Units Built 1940 to 1949	1,164	7.99
Housing Unit Built 1939 or Earlier	3,037	20.86
2015 Est. Median Year Structure Built**	1968	



SECONDARY RETAIL TRADE AREA GAP/OPPORTUNITY ANALYSIS

Brady, Texas

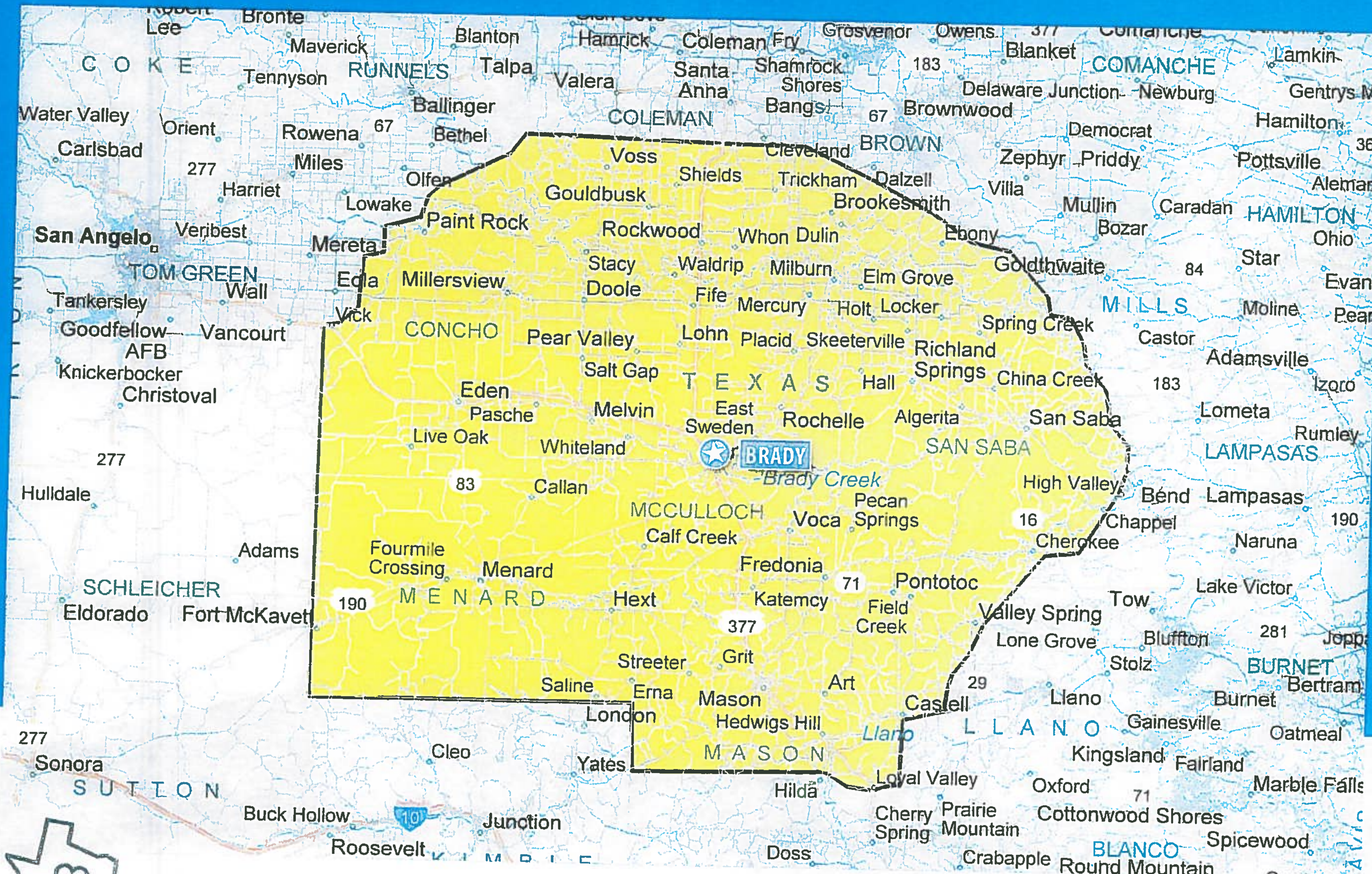
BRADY
THE TRUE HEART OF TEXAS

Prepared for
City of Brady
July 2015

TheRetailCoach®

Secondary Retail Trade Area

Brady, Texas



BRADY
THE TRUE HEART OF TEXAS

Contact Information

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Secondary Retail Trade Area | Gap/Opportunity Analysis Summary
Brady, Texas

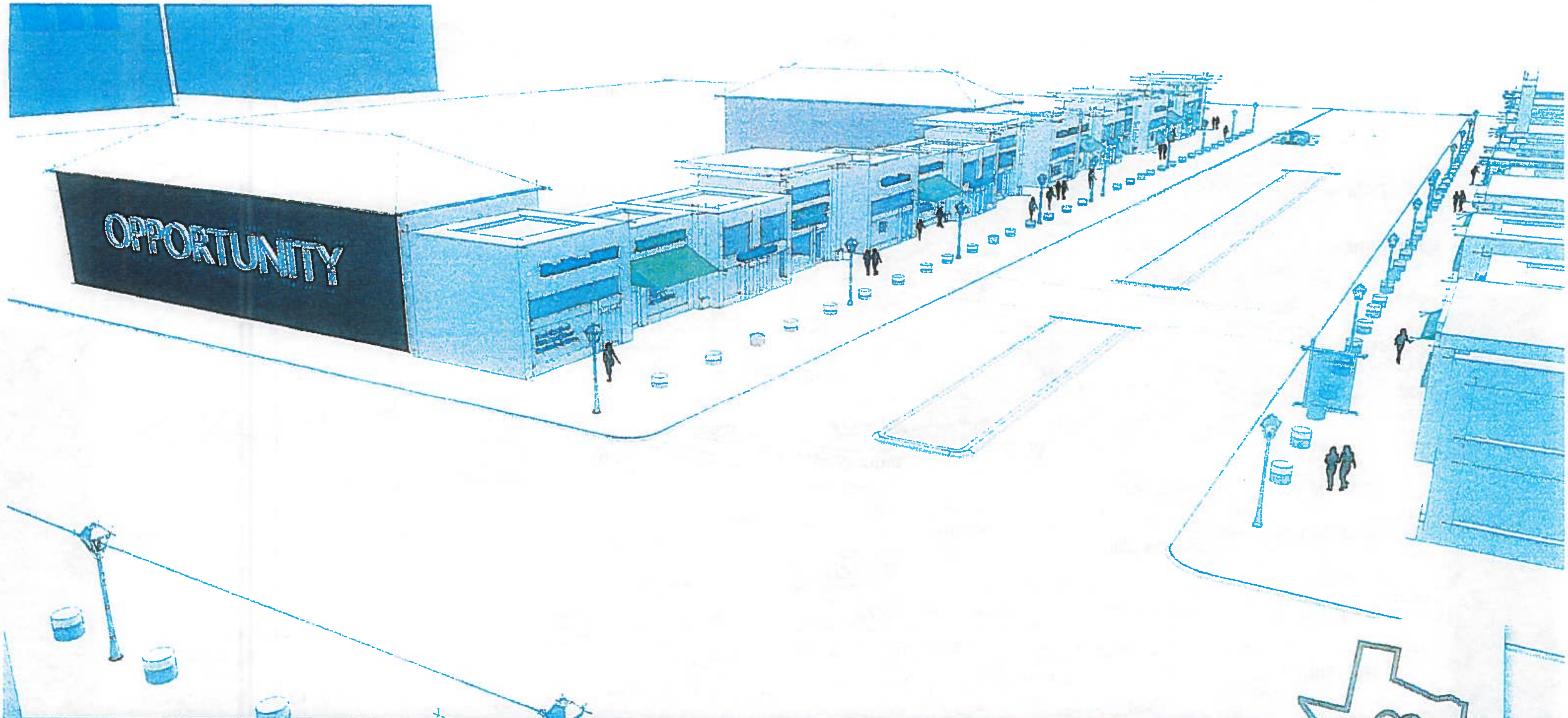
SECTOR	DESCRIPTION	POTENTIAL SALES	EST. ACTUAL SALES	SURPLUS/LEAKAGE	% SURPLUS
	Total Retail Sales Incl Eating and Drinking Places	**412,749,077**	**116,956,690**	**(295,792,387)**	**-72%**
441	Motor Vehicle and Parts Dealers	73,545,460	18,653,284	(54,892,176)	-75%
4411	Automotive Dealers	61,136,185	14,023,195	(47,112,990)	-77%
4412	Other Motor Vehicle Dealers	6,315,663	1,847,910	(4,467,753)	-71%
4413	Automotive Parts/Accsrs, Tire Stores	6,093,613	2,782,179	(3,311,434)	-54%
442	Furniture and Home Furnishings Stores	7,806,186	2,568,116	(5,238,070)	-67%
4421	Furniture Stores	4,077,285	2,523,121	(1,554,164)	-38%
4422	Home Furnishing Stores	3,728,901	44,995	(3,683,906)	-99%
443	Electronics and Appliance Stores	6,840,046	70,437	(6,769,609)	-99%
44311	Appliances, TVs, Electronics Stores	5,311,492	70,437	(5,241,055)	-99%
443111	Household Appliances Stores	969,720	14,641	(955,079)	-98%
443112	Radio, Television, Electronics Stores	4,341,773	55,796	(4,285,977)	-99%
44312	Computer and Software Stores	1,373,326	0	(1,373,326)	-100%
44313	Camera and Photographic Equipment Stores	155,228	0	(155,228)	-100%
444	Building Material, Garden Equip Stores	43,381,424	7,990,279	(35,391,145)	-82%
4441	Building Material and Supply Dealers	37,245,272	7,447,056	(29,798,216)	-80%
44411	Home Centers	15,037,184	0	(15,037,184)	-100%
44412	Paint and Wallpaper Stores	636,282	0	(636,282)	-100%
44413	Hardware Stores	3,625,764	7,447,056	3,821,292	105%
44419	Other Building Materials Dealers	17,946,042	0	(17,946,042)	-100%
4442	Lawn, Garden Equipment, Supplies Stores	6,136,152	543,223	(5,592,929)	-91%
44421	Outdoor Power Equipment Stores	1,714,623	0	(1,714,623)	-100%
44422	Nursery and Garden Centers	4,421,529	543,223	(3,878,306)	-88%

Secondary Retail Trade Area | *Gap/Opportunity Analysis Summary*
Brady, Texas

SECTOR	DESCRIPTION	POTENTIAL SALES	EST. ACTUAL SALES	SURPLUS/LEAKAGE	% SURPLUS
445	Food and Beverage Stores	53,624,673	18,640,040	(34,984,633)	-65%
4451	Grocery Stores	35,142,740	16,146,246	(18,996,494)	-54%
44511	Supermarkets, Grocery (Ex Conv) Stores	32,851,961	14,750,402	(18,101,559)	-55%
44512	Convenience Stores	2,290,779	1,395,844	(894,935)	-39%
4452	Specialty Food Stores	4,220,470	454,277	(3,766,193)	-89%
4453	Beer, Wine and Liquor Stores	14,261,463	2,039,517	(12,221,946)	-86%
446	Health and Personal Care Stores	27,300,092	3,121,542	(24,178,550)	-89%
44611	Pharmacies and Drug Stores	22,063,360	3,000,865	(19,062,495)	-86%
44612	Cosmetics, Beauty Supplies, Perfume Stores	1,949,994	0	(1,949,994)	-100%
44613	Optical Goods Stores	843,287	0	(843,287)	-100%
44619	Other Health and Personal Care Stores	2,443,451	120,677	(2,322,774)	-95%
447	Gasoline Stations	41,075,808	15,155,725	(25,920,083)	-63%
44711	Gasoline Stations With Conv Stores	30,022,134	10,296,865	(19,725,269)	-66%
44719	Other Gasoline Stations	11,053,674	4,858,860	(6,194,814)	-56%
448	Clothing and Clothing Accessories Stores	16,615,422	3,862,509	(12,752,913)	-77%
4481	Clothing Stores	8,584,053	2,813,633	(5,770,420)	-67%
44811	Men's Clothing Stores	418,177	0	(418,177)	-100%
44812	Women's Clothing Stores	1,854,455	158,711	(1,695,744)	-91%
44813	Childrens, Infants Clothing Stores	556,798	0	(556,798)	-100%
44814	Family Clothing Stores	4,645,970	2,590,070	(2,055,900)	-44%
44815	Clothing Accessories Stores	363,170	0	(363,170)	-100%
44819	Other Clothing Stores	745,484	64,852	(680,632)	-91%
4482	Shoe Stores	1,317,704	0	(1,317,704)	-100%
4483	Jewelry, Luggage, Leather Goods Stores	6,713,666	1,048,876	(5,664,790)	-84%
44831	Jewelry Stores	6,030,999	1,048,876	(4,982,123)	-83%
44832	Luggage and Leather Goods Stores	682,667	0	(682,667)	-100%

Secondary Retail Trade Area | Gap/Opportunity Analysis Summary
Brady, Texas

SECTOR	DESCRIPTION	POTENTIAL SALES	EST. ACTUAL SALES	SURPLUS/LEAKAGE	% SURPLUS
451	Sporting Goods, Hobby, Book, Music Stores	6,290,731	1,005,947	(5,284,784)	-84%
4511	Sportng Goods, Hobby, Musical Inst Stores	5,501,264	1,005,947	(4,495,317)	-82%
45111	Sporting Goods Stores	2,685,703	930,729	(1,754,974)	-65%
45112	Hobby, Toys and Games Stores	1,678,170	0	(1,678,170)	-100%
45113	Sew/Needlework/Piece Goods Stores	549,886	75,218	(474,668)	-86%
45114	Musical Instrument and Supplies Stores	587,505	0	(587,505)	-100%
4512	Book, Periodical and Music Stores	789,468	0	(789,468)	-100%
45121	Book Stores and News Dealers	663,514	0	(663,514)	-100%
451211	Book Stores	569,639	0	(569,639)	-100%
451212	News Dealers and Newsstands	93,875	0	(93,875)	-100%
45122	Prerecorded Tapes, CDs, Record Stores	125,953	0	(125,953)	-100%
452	General Merchandise Stores	46,671,446	33,485,124	(13,186,322)	-28%
4521	Department Stores Excl Leased Depts	19,011,974	0	(19,011,974)	-100%
4529	Other General Merchandise Stores	27,659,472	33,485,124	5,825,652	21%
453	Miscellaneous Store Retailers	11,133,298	601,154	(10,532,144)	-95%
4531	Florists	420,996	135,149	(285,847)	-68%
4532	Office Supplies, Stationery, Gift Stores	4,957,716	34,697	(4,923,019)	-99%
45321	Office Supplies and Stationery Stores	2,409,726	34,697	(2,375,029)	-99%
45322	Gift, Novelty and Souvenir Stores	2,547,990	0	(2,547,990)	-100%
4533	Used Merchandise Stores	696,314	160,394	(535,920)	-77%
4539	Other Miscellaneous Store Retailers	5,058,272	270,914	(4,787,358)	-95%
454	Non-Store Retailers	35,691,931	986,818	(34,705,113)	-97%
722	Foodservice and Drinking Places	42,772,557	10,815,715	(31,956,842)	-75%
7221	Full-Service Restaurants	19,284,870	2,561,262	(16,723,608)	-87%
7222	Limited-Service Eating Places	17,050,167	8,254,453	(8,795,714)	-52%
7223	Special Foodservices	4,692,020	0	(4,692,020)	-100%
7224	Drinking Places -Alcoholic Beverages	1,745,500	0	(1,745,500)	-100%



SECONDARY RETAIL TRADE AREA PSYCHOGRAPHIC PROFILE

Brady, Texas

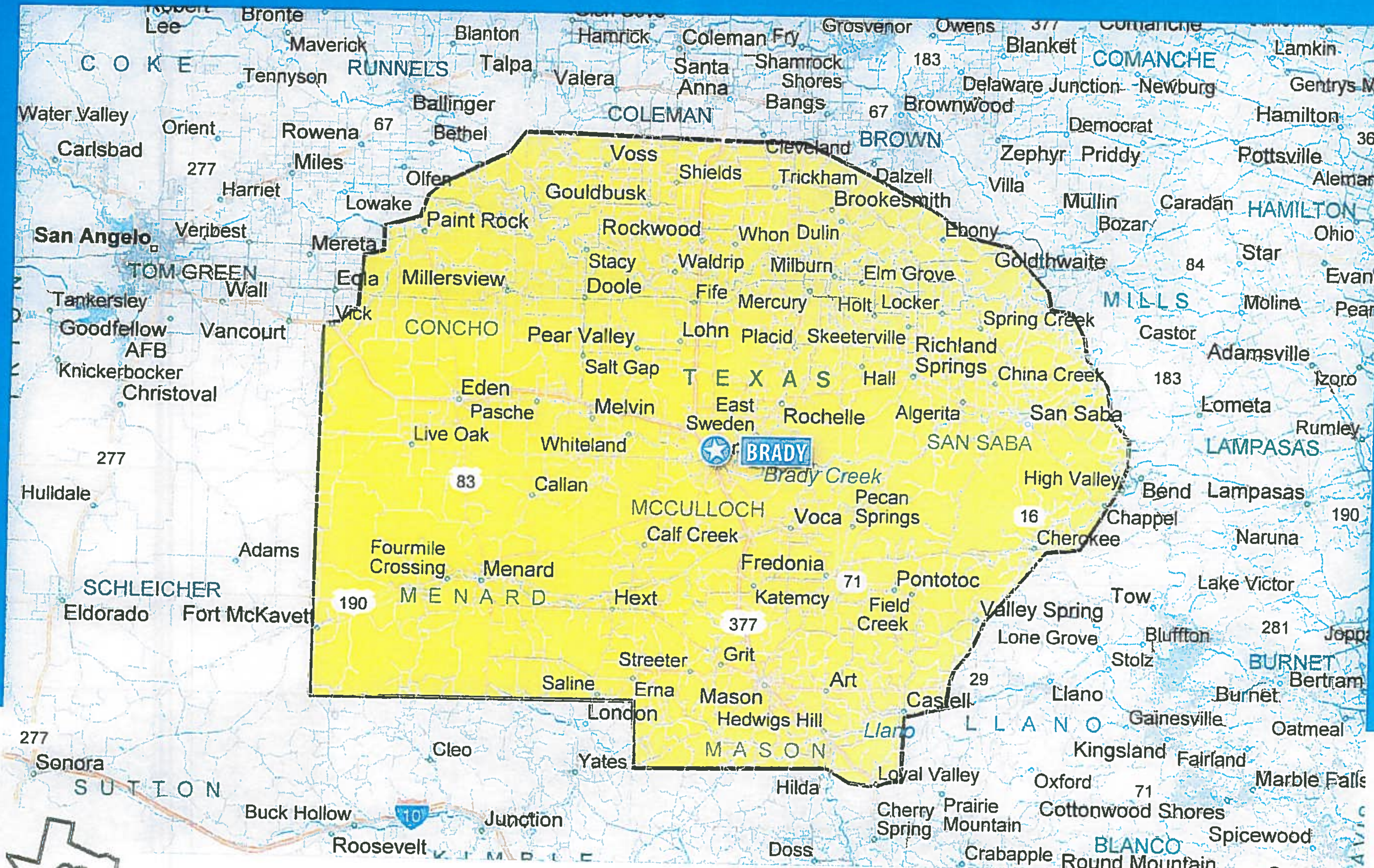
BRADY THE TRUE HEART OF TEXAS

Prepared for
City of Brady
July 2015

TheRetailCoach®

Secondary Retail Trade Area

Brady, Texas



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BRADY
THE TRUE HEART OF
TEXAS

TheRetailCoach

TAPESTRY SEGMENTATION PROFILE

+ WHAT IS TAPESTRY SEGMENTATION?

Tapestry Segmentation is a market segmentation system that classifies US neighborhoods based on their socioeconomic and demographic compositions. Tapestry is a system for classifying consumers and constituents using all the variables that can distinguish consumer behavior, from household characteristics such as income and family type to personal traits like age, education, or employment and even housing choices.

Tapestry Segmentation classifies US neighborhoods into 67 distinct market segments. Neighborhoods with the most similar characteristics are grouped together, while neighborhoods with divergent characteristics are separated. Tapestry Segmentation combines the "who" of lifestyle demography with the "where" of local neighborhood geography to create a model of various lifestyle classifications, or segments, of actual neighborhoods with addresses—distinct behavioral market segments.

+ WHO SHOULD USE TAPESTRY SEGMENTATION?

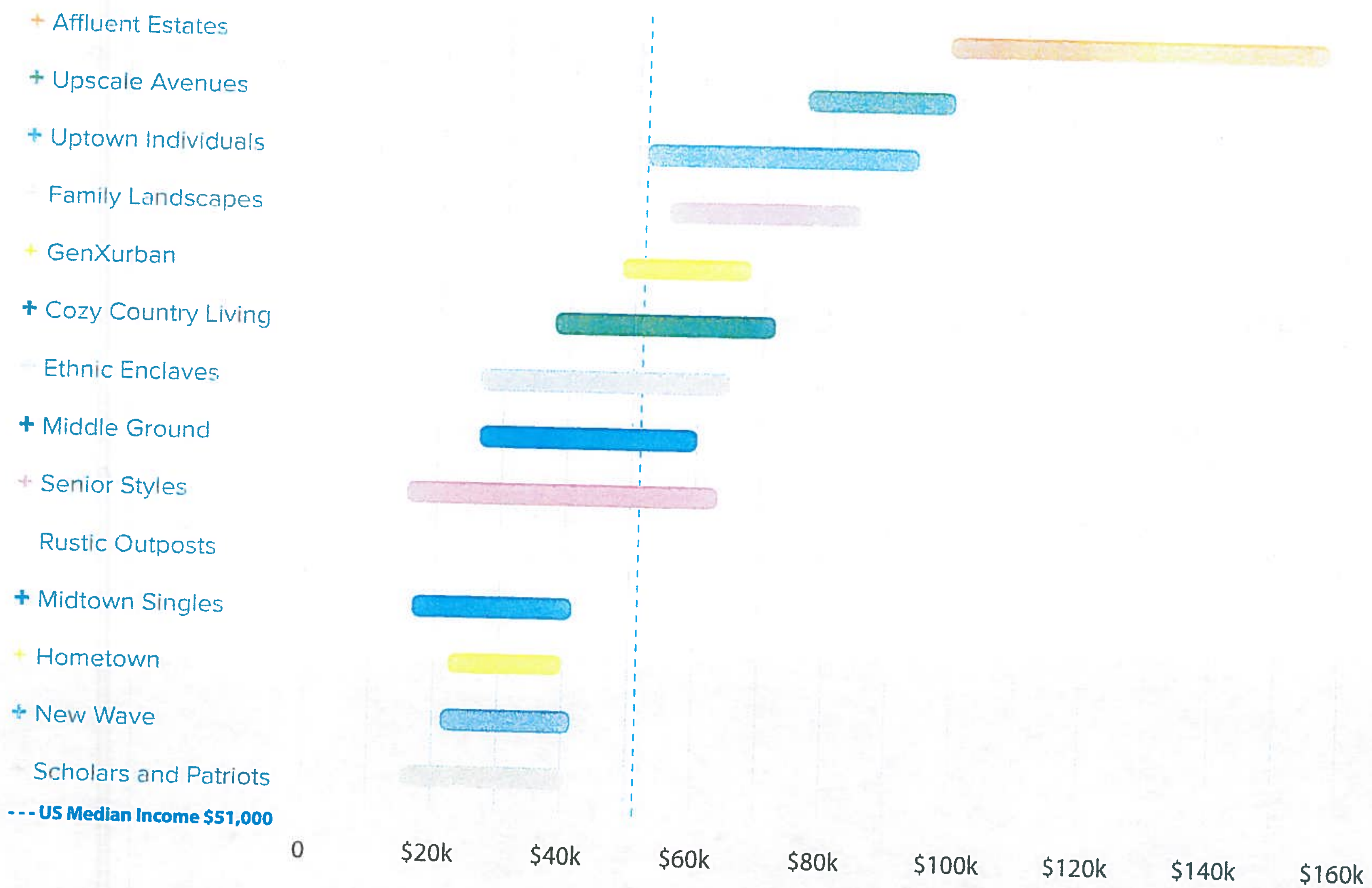
All companies, agencies, and organizations need to understand consumers/constituents in order to supply them with the right products and services and to reach them via their preferred media. These applications require a robust segmentation system that can accurately profile these diverse markets. The versatility and predictive power of Tapestry Segmentation allow users to integrate their own data or national consumer surveys into Tapestry Segmentation to identify their best market segments and reach them through the most effective channels.

+ TAPESTRY SEGMENTATION SUMMARY GROUPS

Esri's Tapestry Segmentation provides a robust, powerful portrait of the 67 US consumer markets. To provide a broader view of these 67 segments, Esri combined them into 14 LifeMode Summary Groups based on lifestyle and lifestage composition.

L1 Affluent Estates
L2 Upscale Avenues
L3 Uptown Individuals
L4 Family Landscapes
L5 GenXurban
L6 Cozy Country Living
L7 Ethnic Enclaves
L8 Middle Ground
L9 Senior Styles
L10 Rustic Outposts
L11 Midtown Singles
L12 Hometown
L13 New Wave
L14 Scholars and Patriots

INCOME RANGE OF LIFEMODE SUMMARY GROUPS



SECONDARY RETAIL TRADE AREA • LIFEMODE SUMMARY GROUPS MAP

Brady, Texas

+ L1 AFFLUENT ESTATES
Established wealth — educated, well-traveled married couples

+ L2 UPSCALE AVENUES
Prosperous, married couples in higher density neighborhoods

+ L3 UPTOWN INDIVIDUALS
Younger, urban singles on the move

+ L4 FAMILY LANDSCAPES
Successful younger families in newer housing

+ L5 GENXURBAN
Gen X in middle age; families with fewer kids and a mortgage

+ L6 COZY COUNTRY
Empty nesters in bucolic settings

+ L7 ETHNIC ENCLAVES
Established diversity — young, Hispanic homeowners with families

+ L8 MIDDLE GROUND
Lifestyles of thirtysomethings

+ L9 SENIOR STYLES
Senior lifestyles reveal the effects of saving for retirement

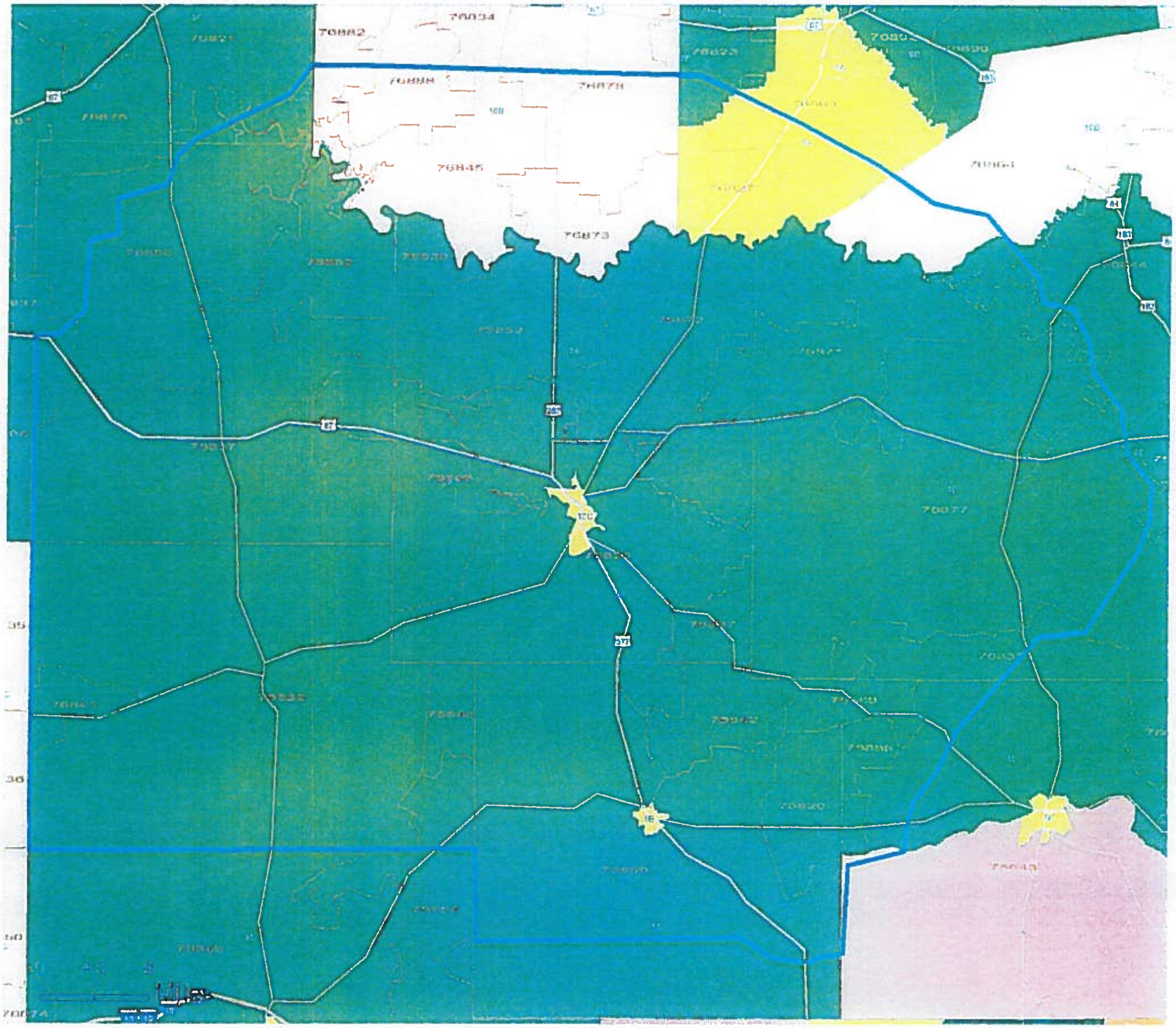
Country life with older families, older homes

+ L11 MIDTOWN SINGLES
Millennials on the move; single, diverse and urban

+ L12 HOMETOWN
Growing up and staying close to home; single householders

+ L13 NEXT WAVE
Urban denizens; young, diverse, hardworking families

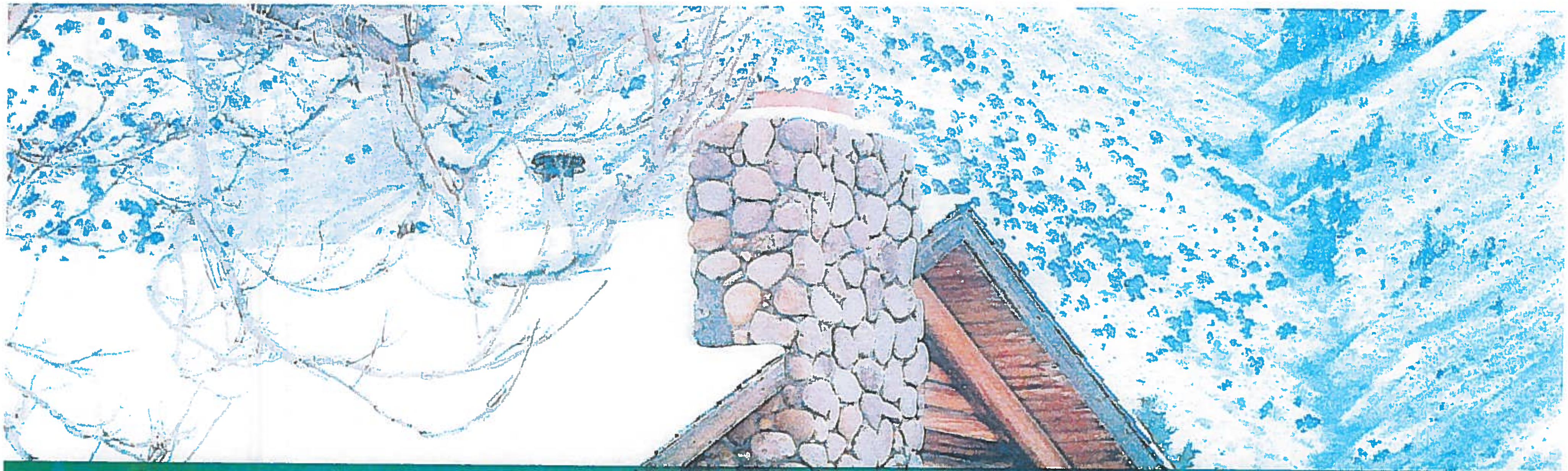
College campuses and military neighborhoods



SECONDARY RETAIL TRADE AREA • TOP TAPESTRY SEGMENTS

Brady, Texas

	TAPESTRY SEGMENTATION	HOUSEHOLDS PERCENT	CUMULATIVE PERCENT	US HOUSEHOLDS PERCENT	CUMULATIVE PERCENT	INDEX
1	Rural Resort Dwellers (6E)	40.6%	40.6%	1.0%	1.0%	3,955
2	Heartland Communities (6F)	22.8%	63.4%	2.4%	3.4%	952
3	Midlife Constants (5E)	12.4%	75.8%	2.5%	5.9%	486
4	Small Town Simplicity (12C)	11.0%	86.8%	1.9%	7.8%	574
5	Rooted Rural (10B)	10.0%	96.8%	2.0%	9.8%	493
	Subtotal	**96.8%**		**9.8%**		
6	Comfortable Empty Nesters (5A)	3.0%	99.8%	2.5%	12.3%	120
7	Silver & Gold (9A)	0.2%	100.0%	0.8%	13.1%	28
8	Prairie Living (6D)	0.0%	100.0%	2.2%	15.3%	1
	Subtotal	**3.2%**		**5.5%**		
	Total	**100.0%**		**15.4%**		**650**



LifeMode Group • Cozy Country Living

6E RURAL RESORT DWELLERS

Although the Great Recession forced many owners of second homes to sell, Rural Resort Dwellers residents remain an active market, just a bit smaller.

These communities are centered in resort areas, many in the Midwest, where the change in seasons supports a variety of outdoor activities. Retirement looms for many of these blue collar, older householders, but workers are postponing retirement or returning to work to maintain their current lifestyles. Workers are traveling further to maintain employment. They are passionate about their hobbies, like freshwater fishing and hunting, but otherwise have very simple tastes.

US Household // 1,215,000
Average Household Size // 2.21
Median Age // 52.4
Median Household Income // $46,000

+ OUR NEIGHBORHOOD

- Housing is owner-occupied, single-family homes, with some mobile homes. A strong market for second homes, these rural areas provide affordable homes valued at 8% less than the US median home value. Over half of the housing units are vacant due to a high seasonal vacancy rate.
- In this older market, 42% of households consist of married couples with no children at home, while another 28% are single person. Married couples with children at home have older school-age children.
- Set in scenic rural locations with proximity to outdoor activities, two vehicles are essential to get around.

+ MARKET PROFILE

(Consumer preferences are estimated from data by GfK MRI)

- Residents drive older domestic vehicles and prefer to spend their disposable income on gear to support their hobbies, which include freshwater fishing, hunting with a rifle or shotgun, and motorcycling.
- At home, Rural Resort Dwellers residents spend any free time working on their vehicles and maintaining their gear. They make frequent trips to their local hardware store for parts and tools. These hands-on consumers are also passionate about vegetable gardening.
- Due to their remote locations, these neighborhoods have satellite dishes. A few residents still rely on dial-up modems to stay connected. They don't access the internet often but will make online purchases for items difficult to find in nearby stores.
- Their taste in TV shows reflects their hobbies—Animal Planet, Discovery Channel, and the DIY Network.

+ SOCIOECONOMIC TRAITS

- Rural Resort Dwellers residents are close to retirement. They've accumulated wealth and begun to shift their portfolios to low-risk assets. These active residents continue to work in skilled occupations.
- Simple tastes and modesty characterize these blue collar residents. They shop for timeless, comfortable clothing, but only when something must be replaced. They pay little attention to advertising and usually stick to the brands they know.
- They spend time with their spouses and also maintain a social calendar.

+ HOUSING

Median home value is displayed for markets that are primarily owner occupied; average rent is shown for renter-occupied markets. Tenure and home value are estimated by Esri. Housing type and average rent are from the Census Bureau's American Community Survey.

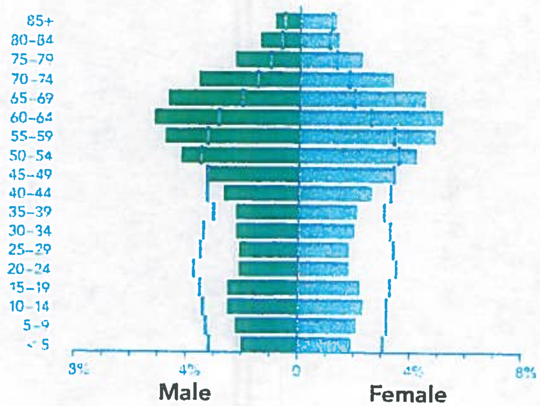
Typical Housing:
Single Family
Median Value:
$163,000
US Median $177,000

6E RURAL RESORT LIVING LifeMode Group • Cozy Country Living

AGE BY SEX (Esri data)

Median Age: 52.4 US: 37.6

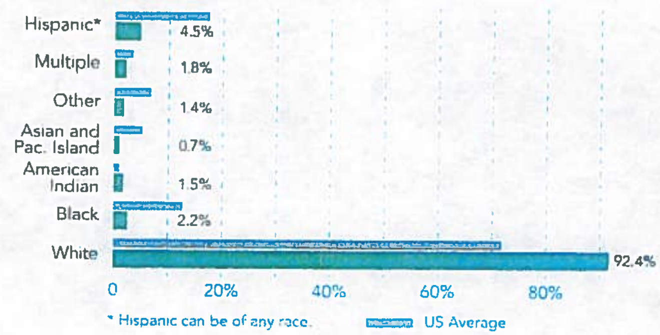
Indicates US



RACE AND ETHNICITY (Esri data)

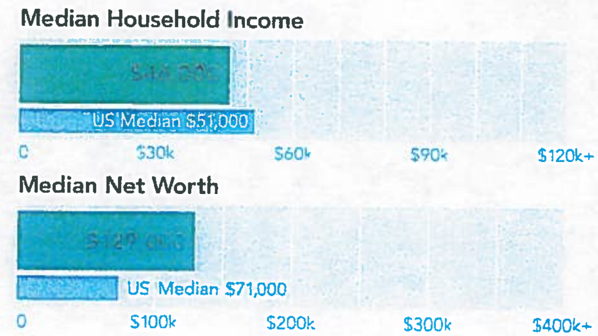
The Diversity Index summarizes racial and ethnic diversity. The index shows the likelihood that two persons, chosen at random from the same area, belong to different race or ethnic groups. The index ranges from 0 (no diversity) to 100 (complete diversity).

Diversity Index: 21.9 US: 62.1



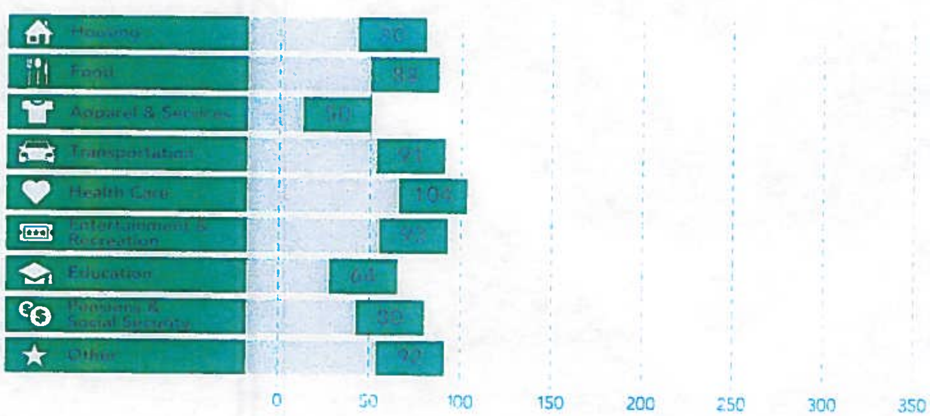
INCOME AND NET WORTH

Net worth measures total household assets (homes, vehicles, investments, etc.) less any debts, secured (e.g., mortgages) or unsecured (credit cards). Household income and net worth are estimated by Esri.



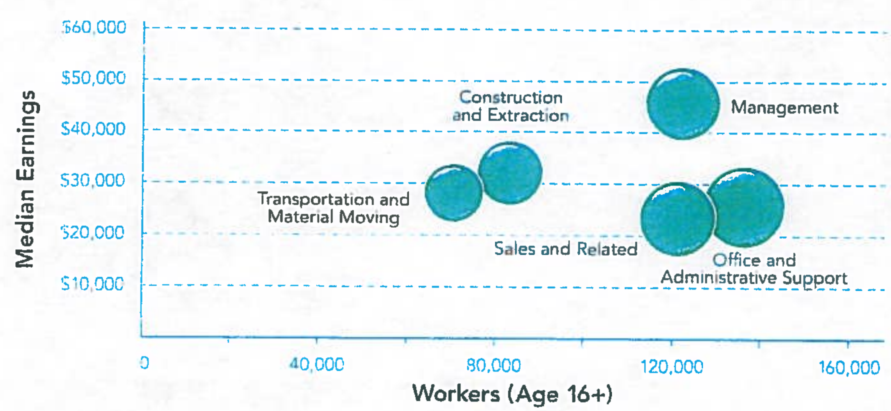
AVERAGE HOUSEHOLD BUDGET INDEX

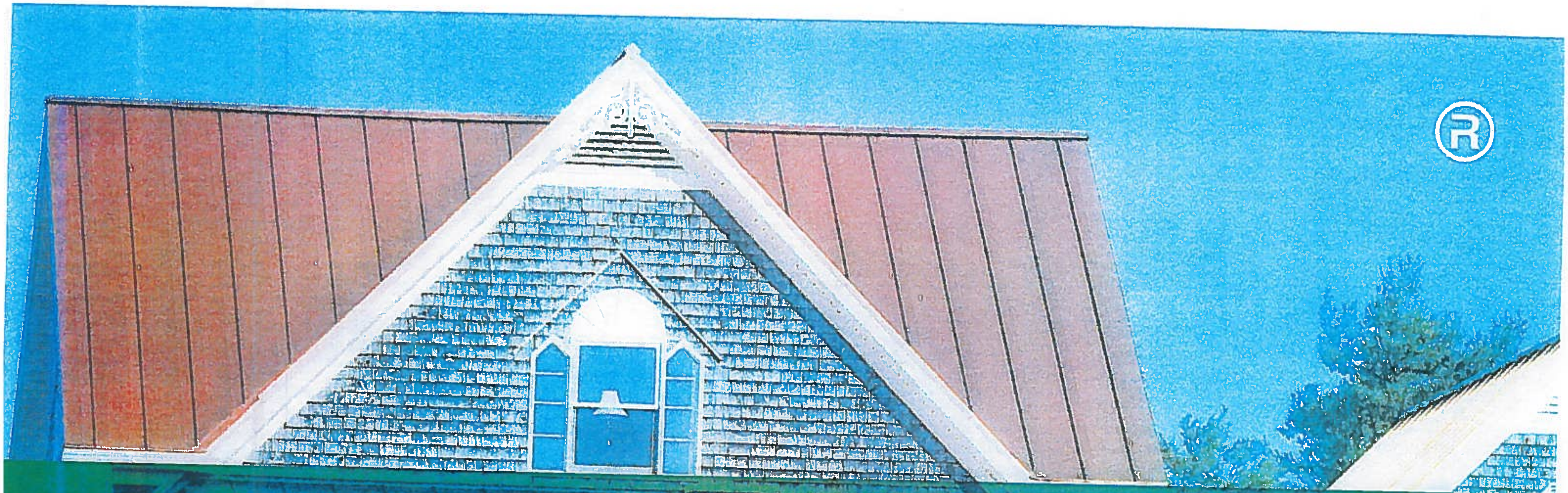
The index compares the average amount spent in this market's household budgets for housing, food, apparel, etc., to the average amount spent by all US households. An index of 100 is average. An index of 120 shows that average spending by consumers in this market is 20 percent above the national average. Consumer expenditures are estimated by Esri.



OCCUPATION BY EARNINGS

The five occupations with the highest number of workers in the market are displayed by median earnings. Data from the Census Bureau's American Community Survey.





LifeMode Group • Cozy Country Living

6F HEARTLAND COMMUNITIES

Well settled and close-knit, Heartland Communities are semi-rural and semiretired.

These older householders are primarily homeowners, and many have paid off their mortgages. Their children have moved away, but they have no plans to leave their homes. Their hearts are with the country; they embrace the slower pace of life here but actively participate in outdoor activities and community events. Traditional and patriotic, these residents support their local businesses, always buy American, and favor domestic driving vacations over foreign plane trips.

US Household // 2,864,000
Average Household Size // 2.38
Median Age // 41.5
Median Household Income // $39,000

6F

+ OUR NEIGHBORHOOD

- Rural communities or small towns are concentrated in the Midwest, from older Rustbelt cities to the Great Plains.
- Distribution of household types is comparable to the US, primarily (but not the majority) married couples, more with no children, and a slightly higher proportion of singles (Index 112) that reflects the aging of the population.
- Residents own modest, single-family homes built before 1970.
- They own one or two vehicles; commutes are short (Index 95).

+ MARKET PROFILE

(Consumer preferences are estimated from data by GfK MRI)

- Traditional in their ways, residents of Heartland Communities choose to bank and pay their bills in person and purchase insurance from an agent.
- Most have high-speed Internet access at home or on their cell phone but aren't ready to go paperless.
- Many residents have paid off their home mortgages but still hold auto loans and student loans. Noninterest checking accounts are common.
- To support their local community, residents participate in public activities.
- Home remodeling is not a priority, but homeowners do tackle necessary maintenance work on their cherished homes. They have invested in riding lawn mowers to maintain their larger yards.
- They enjoy country music and watch CMT.
- Motorcycling, hunting, and fishing are popular; walking is the main form of exercise.
- To get around these semirural communities, residents prefer domestic trucks or SUVs.
- They prefer to travel in the US and favor the convenience of packaged deals.

+ SOCIOECONOMIC TRAITS

- Retirees in this market depress the average labor force participation rate to less than 60% (Index 95), but the unemployment rate is comparable to the US.
- More workers are white collar than blue collar; more skilled than unskilled.
- The rural economy of this market provides employment in the manufacturing, construction, and agriculture industries.
- These are budget savvy consumers; they stick to brands they grew up with and know the price of goods they purchase. Buying American is important.
- Daily life is busy, but routine. Working on the weekends is not uncommon.
- Residents trust TV and newspapers more than any other media.
- Skeptical about their financial future, they stick to community banks and low-risk investments.

+ HOUSING

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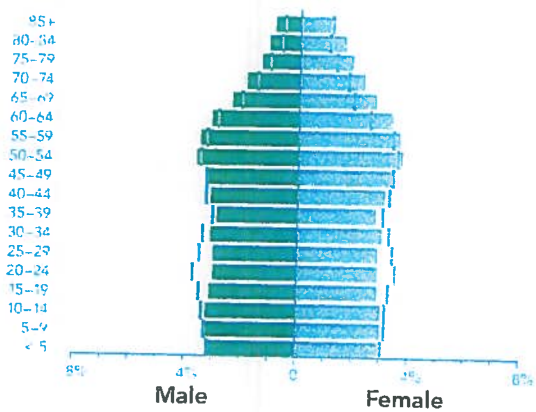
Typical Housing:
Single Family
Median Value:
$89,000
US Median $177,000

6F HEARTLAND COMMUNITES LifeMode Group • Cozy Country Living

AGE BY SEX (Esri data)

Median Age: 41.5 US: 37.6

| Indicates US



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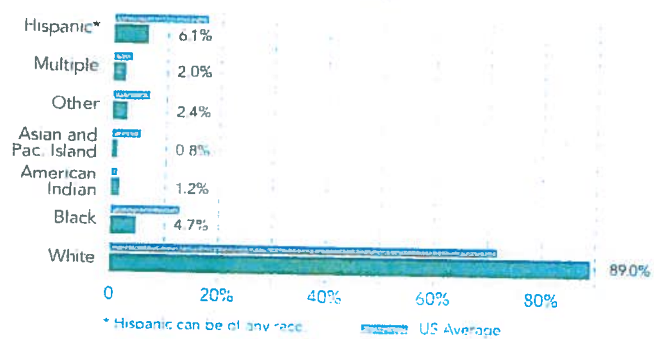
Diversity Index: 29.6 US: 62.1



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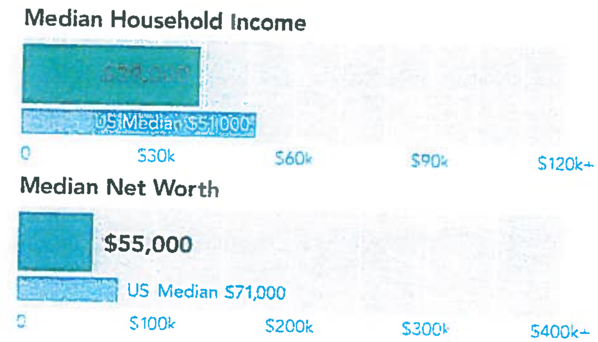

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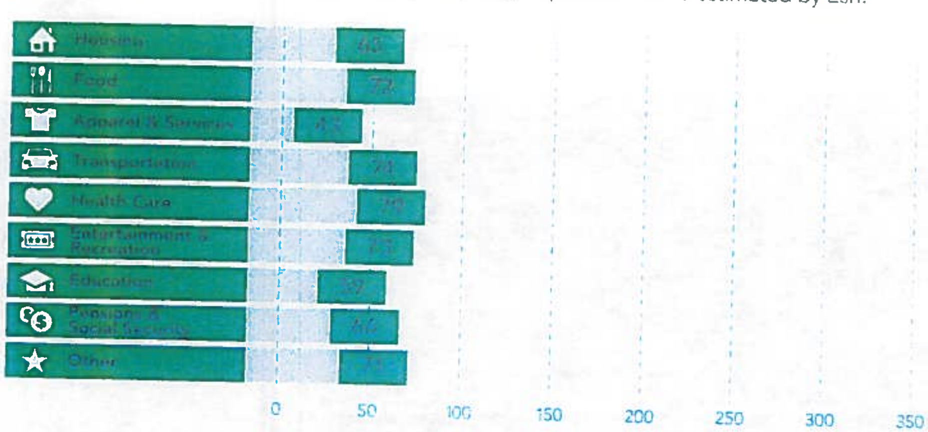

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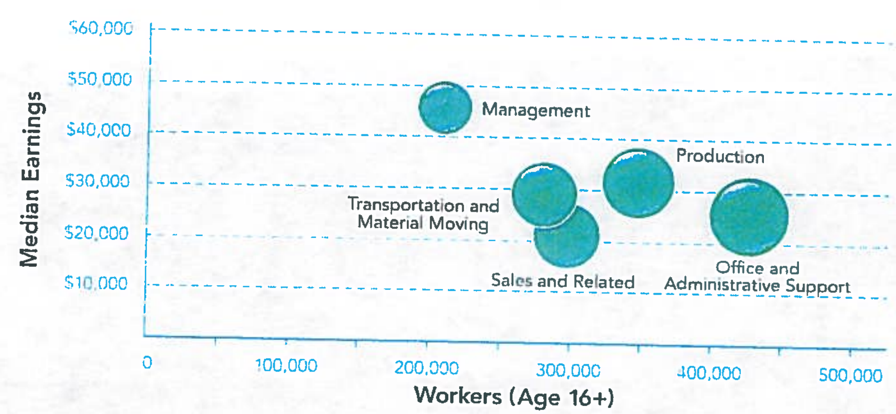


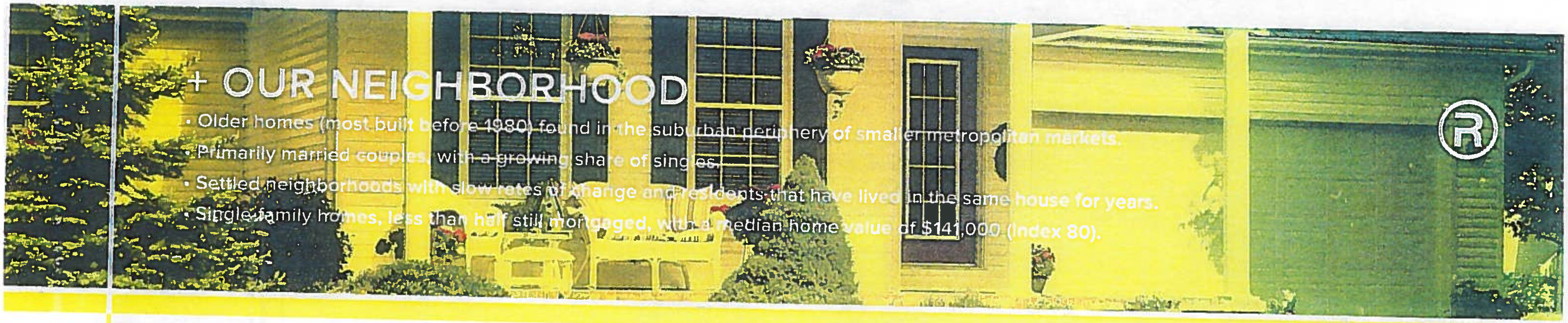
LifeMode Group • GenXurban

5E MIDLIFE CONSTANTS

Midlife Constants residents are seniors, at or approaching retirement, with below average labor force participation and above average net worth.

Although located in predominantly metropolitan areas, they live outside the central cities, in smaller communities. Their lifestyle is more country than urban. They are generous, but not spendthrifts.

US Household // 3,043,000
Average Household Size // 2.30
Median Age // 45.9
Median Household Income // $48,000



+ OUR NEIGHBORHOOD

- Older homes (most built before 1980) found in the suburban periphery of smaller metropolitan markets.
- Primarily married couples, with a growing share of singles.
- Settled neighborhoods with slow rates of change and residents that have lived in the same house for years.
- Single-family homes, less than half still mortgaged, with a median home value of $141,000 (Index 80).

5E

+ MARKET PROFILE

(Consumer preferences are estimated from data by GfK MRI)

- Prefer practical vehicles like SUVs and trucks (domestic, of course).
- Sociable, church-going residents belonging to fraternal orders, veterans' clubs and charitable organizations and do volunteer work and fund-raising.
- Contribute to arts/cultural, educational, political, and social services organizations.
- DIY homebodies that spend on home improvement and gardening.
- Media preferences: country or Christian channels.
- Leisure activities include scrapbooking, movies at home, reading, fishing, and golf.

+ SOCIOECONOMIC TRAITS

- Education: 64% have a high school diploma or some college.
- Unemployment is lower in this market at 7.4% (Index 86), but so is the labor force participation rate (Index 89).
- Almost 42% of households are receiving Social Security (Index 150); 28% also receive retirement income (Index 160).
- Traditional, not trendy; opt for convenience and comfort, not cutting-edge. Technology has its uses, but the bells and whistles are a bother.
- Attentive to price, but not at the expense of quality, they prefer to buy American and natural products.
- Radio and newspapers are the media of choice (after television).

+ HOUSING

Median home value is displayed for markets that are primarily owner occupied; average rent is shown for renter-occupied markets. Tenure and home value are estimated by Esri. Housing type and average rent are from the Census Bureau's American Community Survey.

Single Family

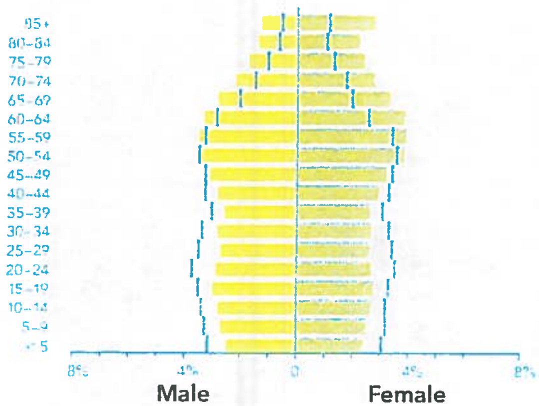
$141,000
US Median $177,000

5E MIDLIFE CONSTANTS LifeMode Group • GenXurban

AGE BY SEX (Esri data)

Median Age: 45.9 US: 37.6

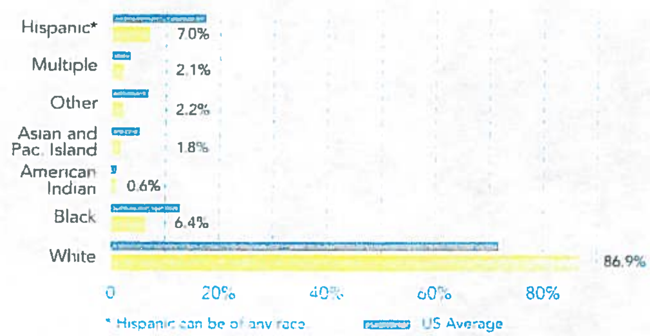
| Indicates US



RACE AND ETHNICITY (Esri data)

The Diversity Index summarizes racial and ethnic diversity. The index shows the likelihood that two persons, chosen at random from the same area, belong to different race or ethnic groups. The index ranges from 0 (no diversity) to 100 (complete diversity).

Diversity Index: 34.0 US: 62.1



INCOME AND NET WORTH

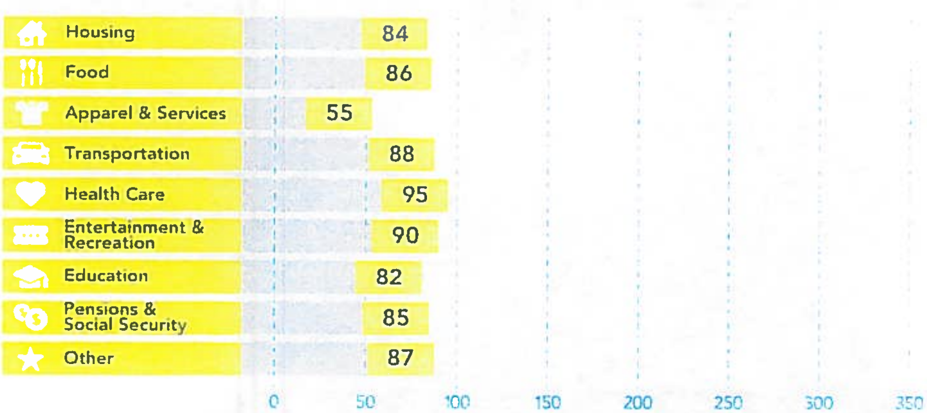
Net worth measures total household assets (homes, vehicles, investments, etc.) less any debts, secured (e.g., mortgages) or unsecured (credit cards). Household income and net worth are estimated by Esri.

Median Household Income

Median Net Worth

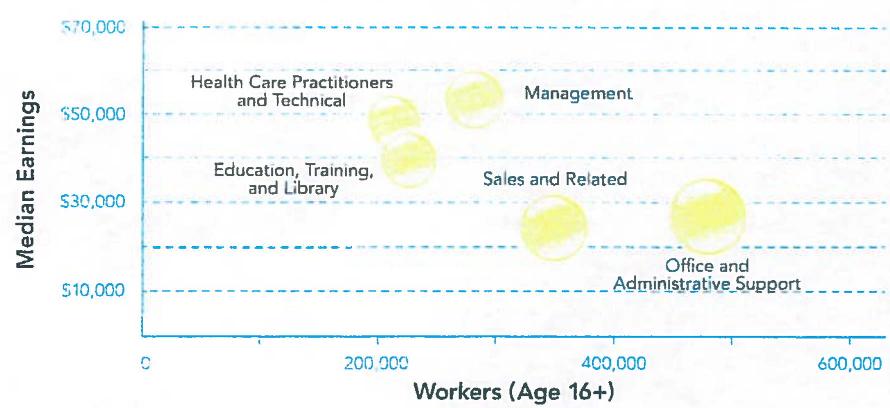
AVERAGE HOUSEHOLD BUDGET INDEX

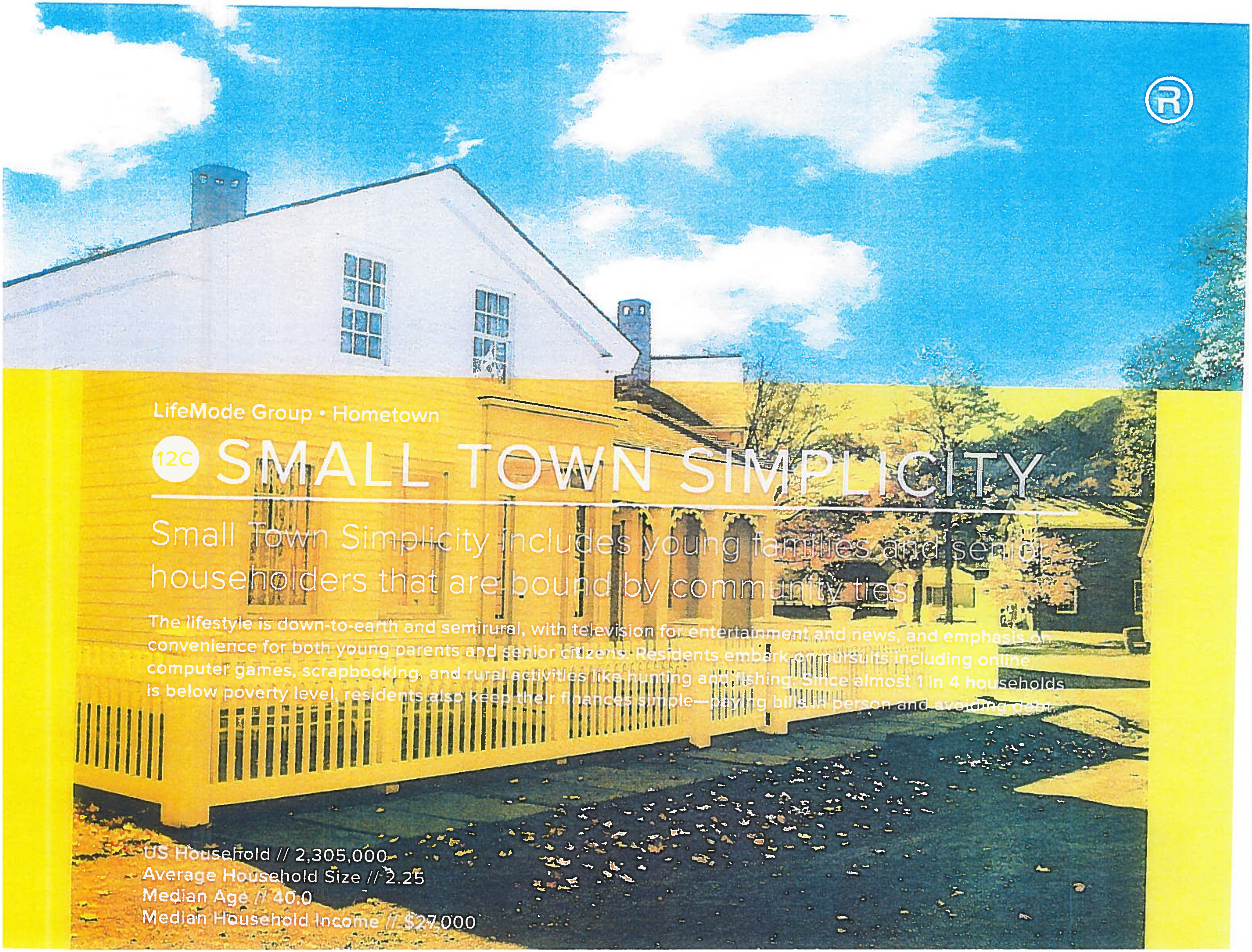
The index compares the average amount spent in this market's household budgets for housing, food, apparel, etc., to the average amount spent by all US households. An index of 100 is average. An index of 120 shows that average spending by consumers in this market is 20 percent above the national average. Consumer expenditures are estimated by Esri.

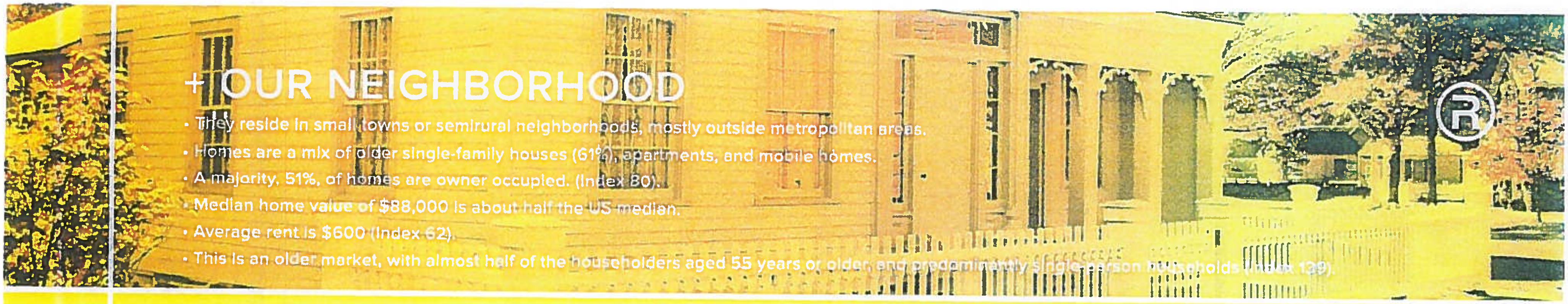


OCCUPATION BY EARNINGS

The five occupations with the highest number of workers in the market are displayed by median earnings. Data from the Census Bureau's American Community Survey.




LifeMode Group • Hometown
12C SMALL TOWN SIMPLICITY
Small Town Simplicity includes young families and senior householders that are bound by community ties.
The lifestyle is down-to-earth and semirural, with television for entertainment and news, and emphasis on convenience for both young parents and senior citizens. Residents embark on pursuits including online computer games, scrapbooking, and rural activities like hunting and fishing. Since almost 1 in 4 households is below poverty level, residents also keep their finances simple—paying bills in person and avoiding debt.
US Household // 2,305,000
Average Household Size // 2.25
Median Age // 40.0
Median Household Income // $27,000



+ OUR NEIGHBORHOOD

- They reside in small towns or semirural neighborhoods, mostly outside metropolitan areas.
- Homes are a mix of older single-family houses (61%), apartments, and mobile homes.
- A majority, 51%, of homes are owner occupied. (Index 80).
- Median home value of $88,000 is about half the US median.
- Average rent is $600 (Index 62).
- This is an older market, with almost half of the householders aged 55 years or older, and predominantly single-person households (Index 139).

+ MARKET PROFILE

(Consumer preferences are estimated from data by GfK MRI)

- Small Town Simplicity features a semirural lifestyle, complete with trucks (domestic, of course), ATVs, and vegetable gardens.
- Hunting, fishing, and target shooting are favorite pastimes.
- A large senior population visit doctors and health practitioners regularly.
- However, a largely single population favors convenience over cooking—frozen meals and fast food.
- Home improvement is not a priority, but vehicle maintenance is.

+ SOCIOECONOMIC TRAITS

- Education: 65% with high school diploma or some college.
- Unemployment higher at 11.9% (Index 138).
- Labor force participation lower at 51% (Index 81), which could result from lack of jobs or retirement.
- Income from wages and salaries (Index 82), Social Security (Index 142) or retirement (Index 112), increased by Supplemental Security Income (Index 203).
- Price-conscious consumers that shop accordingly, with coupons at discount centers.
- Connected, but not to the latest or greatest gadgets; keep their landlines.
- Community-orientated residents; more conservative than middle-of-the-road.
- Rely on television or newspapers to stay informed.

+ HOUSING

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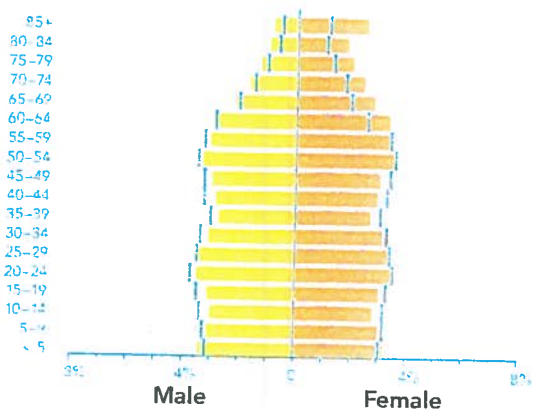
Single Family

$88,000
US Median: $177,000

AGE BY SEX (Esri data)

Median Age: 40.0 US: 37.6

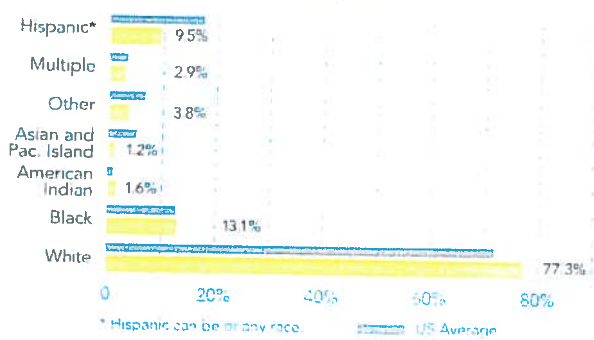
| Indicates US



RACE AND ETHNICITY (Esri data)

The Diversity Index summarizes racial and ethnic diversity. The index shows the likelihood that two persons, chosen at random from the same area, belong to different race or ethnic groups. The index ranges from 0 (no diversity) to 100 (complete diversity).

Diversity Index: [illegible] US: 62.1



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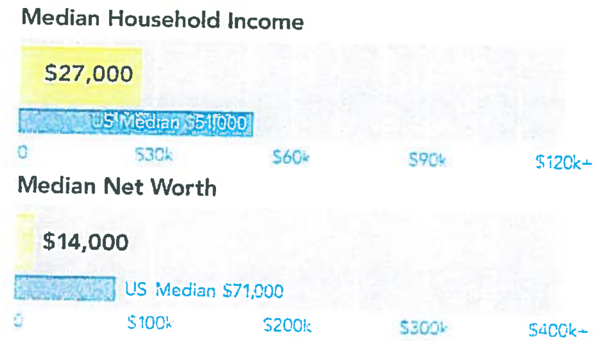

AVERAGE HOUSEHOLD BUDGET INDEX

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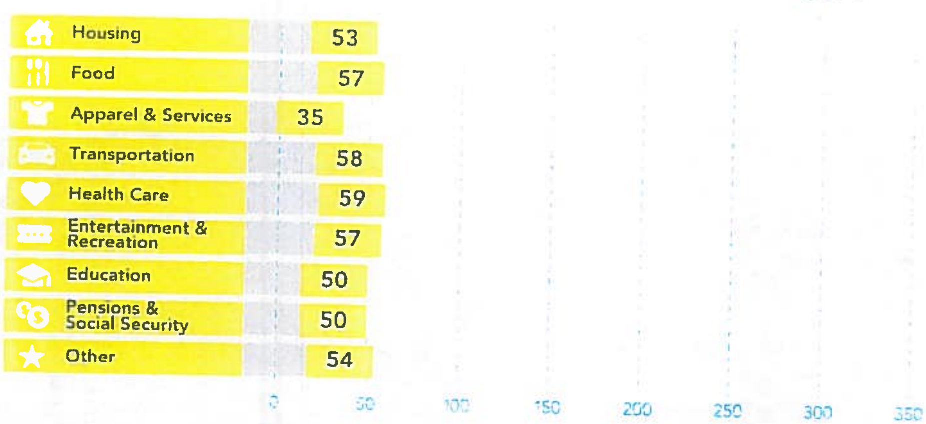

OCCUPATION BY EARNINGS

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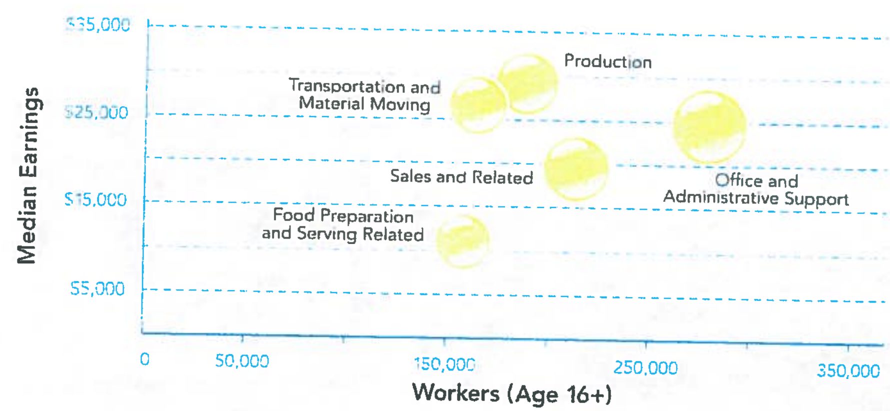

LifeMode Group • Rustic Outposts

ROOTED RURAL

Rooted Rural is heavily concentrated in the Appalachian mountain range as well as in Texas and Arkansas.

Employment in the forestry industry is common, and Rooted Rural residents live in many of the heavily forested regions of the country. Nearly [illegible] residents are non-Hispanic whites. This group enjoys time spent outdoors, hunting, fishing, or working in their gardens. Indoors, they enjoy watching television with a spouse and spending time with their pets. When shopping, they look for American-made and generic products. These communities are heavily influenced by religious faith, traditional gender roles, and family history.

US Household // 2,425,000
Average Household Size // 2.47
Median Age // 44.1
Median Household Income // $38,000

+ OUR NEIGHBORHOOD

- This market is dominated by married couples, few with children at home.
- 80% of homes are owner occupied: primarily single family (7[illegible]%) or mobile homes (2[illegible]%).
- Nearly one in five housing units are vacant, with a high proportion for seasonal use.
- Home values are very low—almost half of owned homes are valued under $100,000.

(Consumer preferences are estimated from data by GfK MRI)

- They own a riding lawn mower, as well as a garden tiller, and have vegetable gardens.
- Only half of the households have a high-speed Internet connection.
- They use a satellite dish to watch CMT, the History Channel, and GSN (Game Show Network).
- Pets are popular—dogs, cats, and birds.
- Leisure activities include hunting and fishing.
- They listen to faith-based radio and gospel music.
- Many are on Medicare and frequent the Walmart pharmacy.
- Thrifty shoppers that use coupons frequently and buy generic goods.
- Far-right political values on religion and marriage.
- Do-it-yourself mentality: grow their own produce and work on their cars and ATVs.
- Pay bills in person and avoid using the Internet for financial transactions.
- Often find computers and cell phones too complicated and confusing.
- Clothes a necessity, not a fashion statement; only buy new clothes when old clothes wear out.

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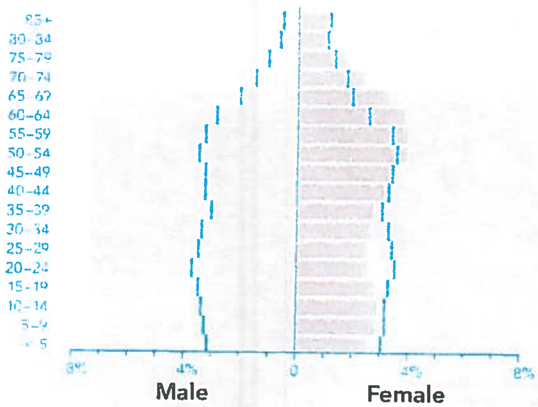
Single Family;
Mobile Homes

$104,000
US Median: $177,000

AGE BY SEX (Esri data)

Median Age: US: 37.6

| Indicates US



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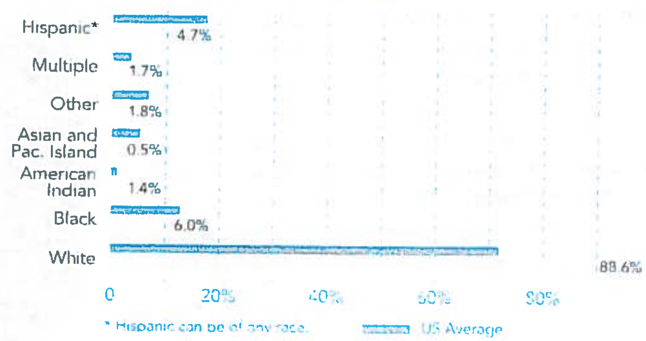

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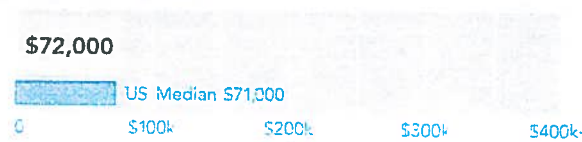
Median Household Income

$38,000

Median Net Worth

$72,000



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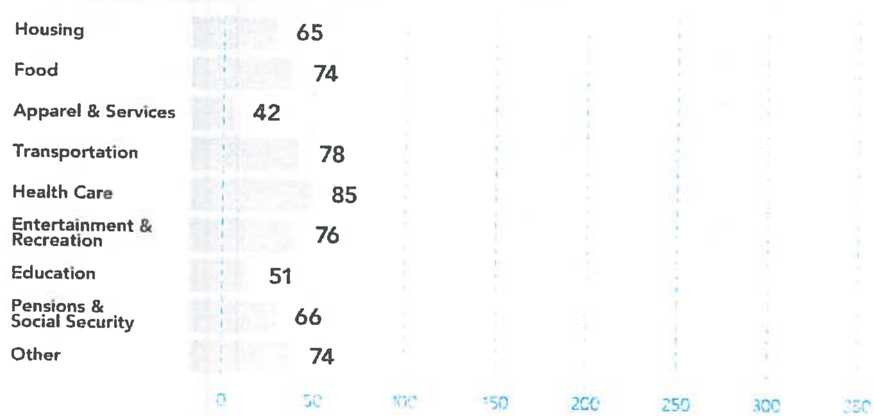

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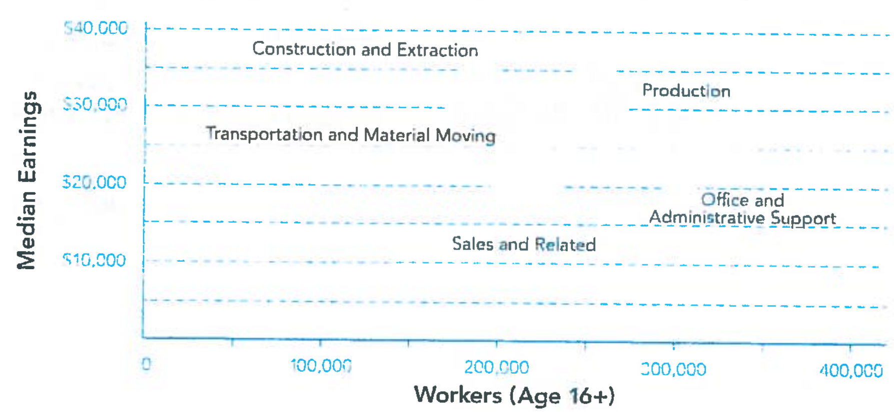

C. Kelly Cofer
President & CEO
The Retail Coach, LLC

About The Retail Coach

The Retail Coach, LLC, is a national retail analytics and locational intelligence firm that specializes in all aspects of retail market analyses and recruitment, from "macro to micro" trade area assessment to actively recruiting retailers on behalf of our clients.

Through its unique Retail:360 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" data gathered through extensive visits within our clients' communities.

Every community is different, and there is no "one size fits all" retail recruitment solution. Compiling the gathered data into client-tailored information packets that are uniquely designed for, and targeted to, specific retailers and restaurants who meet the community's needs helps assure our clients that they are receiving the latest and best information for their retail recruitment efforts — all with personal service and coaching guidance that continues beyond the initial project scope and timeline.

Our 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.

The Retail Coach -
It's not about data. It's about your success.

The Retail Coach, LLC | P. O. Box 7272 | Tupelo, Mississippi 38802
tel 800.851.0962 | *fax* 662.844.2738 | *e-mail* info@theretailcoach.net | *web* www.theretailcoach.net

Brady Economic Development Corporation
City of Brady, Texas
Agenda Action Form

AGENDA DATE:	08/06/2015	**AGENDA ITEM**	4A
AGENDA SUBJECT:	Discussion, consideration, and possible action on an Economic Incentives Package for Cement Business		
PREPARED BY:	Peter Lamont	**Date Submitted:**	07-31-2015
EXHIBITS:	Fact Sheet		

BUDGETARY IMPACT:	**Required Expenditure:**	$250,000.00
	Amount Budgeted:	$00.00
	Appropriation Required:	$00.00

CITY MANAGER APPROVAL:	

SUMMARY:

In July of 2014 the City of Brady was approached by a site selection consultant to propose a site for a cement plant. Ongoing negotiations and investigations have resulted in Brady being selected as one of two finalists for the facility. At this time, the EDC is being asked to provide potential incentives for the company to locate in McCulloch County. At their July 13, 2015 meeting, both the Brady City Council and the McCulloch County Commissioners Court authorized the Brady EDC to assist in a county project.

The development has committed to $175,000,000 of capital improvements and 200 new jobs for McCulloch County.

Initial proposals from the EDC include a one-time lump sum payment of $250,000 upon completion of the plant and 9 annual grants from new sales tax dollars not to exceed $34,000 per year for a maximum of nine years. Payments are expected to begin in 2018.

None of these incentives shall be paid until the plant construction is completed and the new sales tax collected.

RECOMMENDED ACTION:

Staff recommends authorizing the City Manager to enter into an Economic Development agreement with the proposed cement plant developer to include a one-time lump sum payment of $250,000 upon completion of the plant and 9 annual grants from new sales tax dollars not to exceed $34,000 per year for a maximum of nine years. This agreement to include necessary safeguards and claw backs should the developer fail to meet any of the agreed upon benchmarks.

FACT SHEET – August 4, 2015

City of Brady – Possible Cement Plant

Economic Development Incentives Proposed

WHO: RWCRC LLC, Incorporated in Texas
(new plant to be built in Texas or New Mexico)

WHAT: Manufacturing – Building Products Industry - Premium White Cement – New Technology – Natural Gas Green Industry
Self-contained designed plant

WHEN: 1 year of permitting; 1 year of construction before opening; Phase 1 $175M new construction; 200 permanent jobs - $7M annual payroll

WHERE: 5 miles north of Brady on Hwy 377; currently has a 500 acre tract option to purchase

WHY: 50-80 year supply of limestone; availability of natural gas, railroad (local and BNSF Railroad is working with company), highways, and workforce

UTILITES: Electric – Sharyland; Natural Gas – City of Brady or WTG; Water – City of Brady or well

ECONOMIC INCENTIVES UNDER CONSIDERATION/RECOMMENDED:
2 sites remain proposed

- McCulloch County – 10-year 85% county tax abatement on new taxable investment
- Brady EDC (4A Corporation) - $250,000 one-time payment when facility is opened and producing; 9-year rebate on additional sales tax generated from project, not to exceed $34,000; assistance with workforce training programs and state economic incentive programs
- City of Brady – 9-year rebate on additional sales tax generated from project, not to exceed $33,000
- Proposing to apply to another County government agency for a 9-year tax abatement on additional property taxable investment, not to exceed $33,000

- State of Texas Economic and Tourism Division – Assist with application for Texas Enterprise Funds (Governor's Office "deal closing" funds for new Texas jobs).
- State of Texas Department of Agriculture – Assist with application for Texas Capital Funds (Texas funds for infrastructure improvements for new business development).
- State Workforce Commission – Assist with development of workforce training programs

WHY AND WHAT IS A NON-DISCLOSURE AGREEMENT (NDA): City of Brady has signed a NDA with this company. Non-disclosure agreements are typical and expected practices from businesses that are considering locating to a new community. A non-disclosure agreement (NDA), also known as a confidentiality agreement (CA), confidential disclosure agreement (CDA), proprietary information agreement (PIA), or secrecy agreement (SA), is a legal contract between at least two parties that outlines confidential material, knowledge, or information that the parties wish to share with one another for certain purposes, but wish to restrict access to or by third parties. It is a contract through which the parties agree not to disclose information covered by the agreement.
An NDA creates a confidential relationship between the parties to protect any type of confidential and proprietary information or trade secrets. As such, an NDA protects nonpublic business information.

Questions may be addressed to City of Brady, Peter Lamont, BEDC Director, plamont@bradytx.us