

FORNEY, TEXAS 2017 RETAIL MARKET ANALYSIS

MAY 2017



ECONOMIC DEVELOPMENT

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Introduction

Attracting retail, which used to nearly be a matter of making a phone call, has now become a profession, an art and science, and an active economic development strategy. Retailers have highly developed and often rigid formulas for where they choose to build new stores; these site selection strategies may not consider local conditions that could contribute to a successful store location.

Since the recession, the retail industry has been impacted by the following factors that are contributing to many store closings:

- An overbuilt market or retail “bubble”
- The rise of e-commerce
- The decline of malls
- Shifting consumer buying behaviors

Prior to the recession, retail and restaurant chains built new stores rapidly and nearly anywhere they could. While they may have had site selection methodologies, they were highly driven to put in as many locations as possible. Walmart is the classic example, and before them, K-Mart. The 1990s and early 2000s saw what some might call unrestrained expansion. It was easy for most towns to call up a Wendy’s or Walmart and ask them to come to build a new store. According to many industry experts, that rapid expansion led to a retail ‘bubble’ similar to the housing “bubble.” These analysts now estimate that the recent spate of announced store closings is due to a needed market correction more than other factors.

Retail was acutely hit during the recession, and coming out of the recession, retail businesses were further impacted by the rise of Amazon. While this is often cited as a major reason for the decline of brick-and-mortar stores, e-commerce is about 10% of total retail spending in the U.S., meaning that consumers continue to buy about 90% of all purchases in stores.

Malls, however, are in sharp decline. A new phenomenon in the 1960s and 1970s, malls are now considered ancient. About a third of U.S. malls are either being completely revamped or torn down. Not a single new mall has been built in the U.S. since 2005, and some estimates are that another 30% will close in the coming years. Malls that have invested heavily in renovations and in maintaining a high-end or luxury shopping experience are doing well. However, many of the recent store closings and announced closings have been for mall-based locations. Closing department stores – Macy’s, JC Penney, and Sears, among others – are often anchor stores in malls. Without these stores, affected malls can experience a rapid downward spiral as remaining stores renegotiate leases because of declining foot traffic.

While some longtime retail chains are closing, many new chains are rising in their places and expanding rapidly. New stores, such as Bonobos, Shinola, and Warby Parker, are opening new

stores in urban centers across the country. They are part of a migration of retail back to urban centers and away from suburban mall locations. Often these new stores combine online shopping with in-store shopping and service. The stores keep little inventory on hand. Shoppers can try on clothes and peruse store offerings, but their purchases are made online. These stores are smaller, which is more suited to dense urban and downtown areas. They offer more service and a more personalized shopping experience. Finally, with smaller inventories, these new types of chain stores are able to innovate rapidly and change seasonal offerings more quickly and at lower inventory cost. For downtown areas and smaller towns, these trends offer hope to bring retail back to Main Street. Since the recession, consumer spending has trended away from clothing and traditional department store offerings and toward travel, dining and entertainment and tech products. This trend lends itself well to the downtown boutique shopping experience in a very mixed retail setting.

Overview

Retail leakage studies start with a local area such as a smaller city to understand how much of the estimated local demand is not being met by area retailers. Next we consider the broader region to understand how far people are traveling to shop. If people only have to drive five minutes outside of the target area, it's going to be hard for that target area to make a case to a retailer to open a new location.

In the first part of this report, we examine regional demographics and next match the demographics to household spending patterns. Combined, we present a table showing regional demand and supply. Section I also presents typical store characteristics, by retail type, from the U.S. Census of Retailers.

The next part of the report discusses store location criteria by type of store. Most types of retail have guidelines on site selection factors. For example, grocery stores in a suburban area plan on drawing from a three-minute drive time. In the grocery store example, we would look at demand within a three-minute drive time. But for furniture stores or car dealerships, we would be looking at demand within a longer driving radius. If Ikea's criteria, for example, are that it draws from a 90-minute drive radius, then a town within a two-hour drive from an Ikea store could have a difficult time persuading Ikea to open another location in the town.

Located in Kaufman County, Texas, Forney is about a 30-minute drive east of Dallas. This study estimates the demand, supply, and retail gap by type of store for Forney, Texas, based on retail site selection preferences.

Gap Analysis

Supply and Demand

Table 1 shows the total spending by Forney residents by type of purchase along with sales to people outside of Forney who buy from local retailers. Across all categories, local demand for products, including visitors, was \$370 million. However, Table 2 shows that total sales in 2016 by Forney retailers were slightly less than \$160 million, leaving a gap of potential retail sales in Forney of nearly \$210 million.

Table 1: Estimated Demand, Retail Sales, Forney, 2016

Description	2016 Estimated Purchases by Forney Residents from Outside of Forney	2016 Estimated Purchases by Forney Residents Within Forney	2016 Estimated Purchases by Forney Visitors	2016 Estimated Total Demand
Automobile Dealers	\$25,151,843	\$1,285,071	\$10,101,846	\$36,538,759
Automotive Parts, Accessories, and Tire Stores	\$4,610,334	\$1,746,167	\$3,065,749	\$9,422,250
Furniture and Home Furnishings Stores	\$6,243,254	\$512,011	\$393,245	\$7,148,510
Electronics and Appliance Stores	\$8,690,496	\$240,145	\$320,395	\$9,251,035
Building Material and Garden Equipment and Supplies Dealers	\$12,524,814	\$3,417,213	\$9,834,142	\$25,776,170
Food and Beverage Stores	\$18,760,405	\$9,633,430	\$7,991,891	\$36,385,726
Health and Personal Care Stores	\$14,080,999	\$1,645,375	\$3,643,109	\$19,369,483
Clothing and Clothing Accessories Stores	\$12,334,060	\$257,981	\$48,433	\$12,640,474
Sporting Goods, Hobby, Musical Instrument, and Book Stores	\$5,812,436	\$223,190	\$229,546	\$6,265,171
General and Miscellaneous Merchandise Stores	\$34,455,074	\$10,516,098	\$37,310,775	\$82,281,947
Food Services and Drinking Places	\$59,805,644	\$18,212,846	\$32,549,732	\$110,568,221
TOTAL	\$208,825,848	\$48,619,093	\$111,353,691	\$368,798,632

Source: Emsi 2017.1 Dataset

Using average sales per store by type of store, we next calculated the estimated number of stores that could further be supported by the volume of potential retail business in Forney, which is shown in the last column in Table 2.

Table 2: Estimated Gap in Number of Stores, Forney.

Description	2016 Estimated Total Demand	2016 Total Sales	2016 Retail Gap	Estimated Sales/Store	# of Existing Establishments	Estimated Gap in # Stores
Automobile Dealers	\$36,538,759	\$11,386,916	(\$25,151,843)	\$17,000,000	21	1
Automotive Parts, Accessories, and Tire Stores	\$9,422,250	\$4,811,916	(\$4,610,334)	\$1,500,000	22	3
Furniture and Home Furnishings Stores	\$7,148,510	\$905,256	(\$6,243,254)	\$2,000,000	21	3
Electronics and Appliance Stores	\$9,251,035	\$560,539	(\$8,690,496)	\$2,200,000	10	4
Building Material and Garden Equipment and Supplies Dealers	\$25,776,170	\$13,251,355	(\$12,524,814)	\$4,000,000	35	3
Food and Beverage Stores	\$36,385,726	\$17,625,321	(\$18,760,405)	\$4,400,000	17	4
Health and Personal Care Stores	\$19,369,483	\$5,288,484	(\$14,080,999)	\$3,000,000	7	5
Clothing and Clothing Accessories Stores	\$12,640,474	\$306,414	(\$12,334,060)	\$1,800,000	40	7
Sporting Goods, Hobby, Musical Instrument, and Book Stores	\$6,265,171	\$452,735	(\$5,812,436)	\$1,800,000	16	3
General and Miscellaneous Merchandise Stores	\$82,281,947	\$47,826,873	(\$34,455,074)	\$1,000,000	37	34
Food Services and Drinking Places	\$110,568,221	\$50,762,577	(\$59,805,644)	\$1,200,000	126	50
TOTAL	\$368,798,632	\$159,972,784	(\$208,825,848)		352	118

Source: Emsi 2017.1 Dataset and U.S. Retail Census, 2012

Chart 1: Estimated Gap in Number of Stores, Forney.

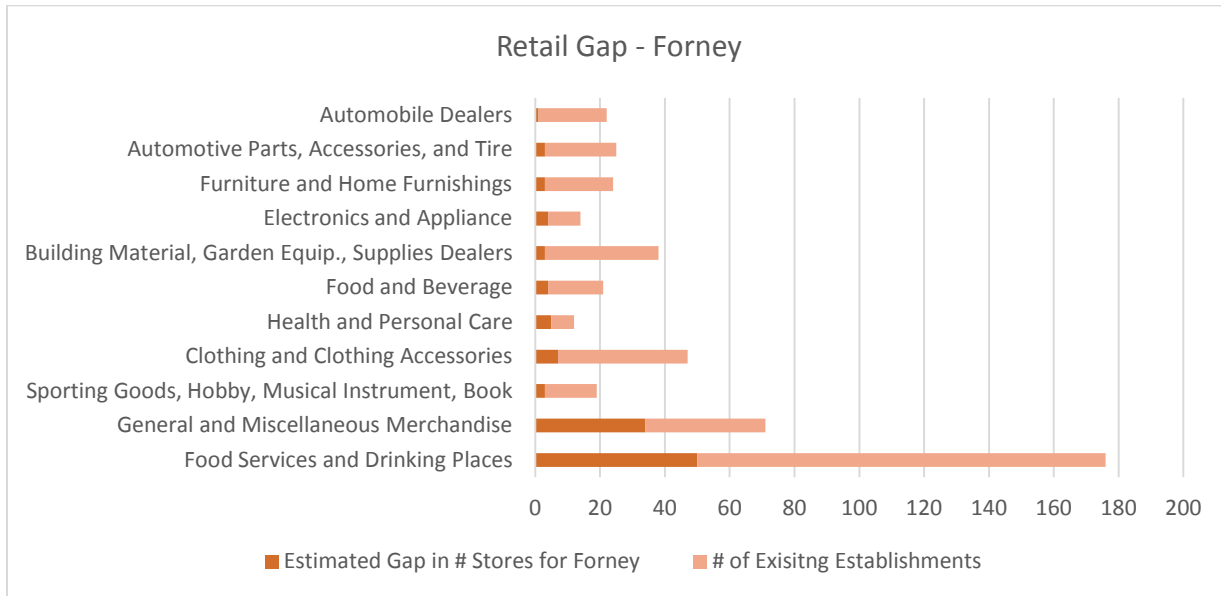


Table 3 further highlights the potential for more retail capacity in Forney. Table 3 shows the status of retail in Kaufman County. The location quotient, for example, shows that the concentration of retail in Kaufman County is lower than expected. While a location quotient of 1.0 is the national average for each type of business, generally location quotients of less than 1.2 are considered to be low levels of business concentration.¹ Another gleaning from Table 3 is the average number of jobs that could be realized, by type of store, if more stores open in Forney.

Table 3: Estimated Retail Presence in Kaufman County, 2016

Description	2016 Location Quotient	2016 Payrolled Business Locations, Kaufman County	2016 Jobs, Kaufman County	2016 Average Jobs per Store, Kaufman County
Automobile Dealers	1.47	21	446	21
Automotive Parts, Accessories, and Tire	1.51	21	190	9

¹ When analyzing business activity, one measure is regional concentration as compared to the national average for that type of business. This comparison reveals the relative concentration in the region by type of business, measured by location quotient (LQ; see more in the following paragraph). Business types with high concentration (or LQ) are said to be specialized in a region.

A location quotient shows a business type's share of an area's employment relative to the national average. For example, a location quotient of 2.0 indicates that the business segment accounts for twice the share of employment in the area than it does nationally, and a location quotient of 0.5 indicates that the area's share of employment in the industry is only half the national average. In Kaufman County, the furniture stores segment of retail has an LQ of 0.38. This means that for the size of the economy of Kaufman County, furniture stores have slightly more than one-third the level of concentration than would be expected in another economy of similar size.

Description	2016 Location Quotient	2016 Payrolled Business Locations, Kaufman County	2016 Jobs, Kaufman County	2016 Average Jobs per Store, Kaufman County
Stores				
Furniture and Home Furnishings Stores	0.38	8	42	5
Electronics and Appliance Stores	0.43	6	52	9
Building Material and Garden Equipment and Supplies Dealers	1.59	26	460	18
Food and Beverage Stores	1.20	36	844	23
Health and Personal Care Stores	0.71	21	170	8
Clothing and Clothing Accessories Stores	1.30	33	407	12
Sporting Goods, Hobby, Musical Instrument, and Book Stores	0.26	5	39	8
General Merchandise Stores	1.71	48	1,412	29
Food Services and Drinking Places	1.13	136	2,904	21
TOTAL		361	6,966	19

Source: Emsi 2017.1 Dataset

Methodology

The supply and demand for retail products by type of product are derived from Emsi’s Input-Output model, which incorporates data from the Bureau of Economic Analysis (BEA). An Input-Output model represents the flow of money in an economy. The demand estimate describes the purchases that consumers and local businesses make from retailers (by type of store) also estimates whether those purchases are made within or outside the region of study. Also known as a gap analysis, this report can be used to find demand leakage (for retail products) in the economy, or where money is leaving the region that might otherwise be captured.

We estimated the average sales per store using the U.S. Census of Retail, 2012 (adjusting that data to 2016 dollars). To doublecheck these results, we next calculated average sales per store using Emsi’s database, which compiles consumer spending and retail sales from federal and state sources. The results of these two methods yielded a narrow range of sales per store from which we determined an average estimate of sales per store by type of store. These results are shown in Table 2 and Chart 1 above.

It should be noted that the estimated sales per store can vary widely depending on store brand, exact types of items sold in the store (Pier 1 and Ikea are in the same category, but are significantly different stores). Even within the same store brand, retailers have different sales expectations – sometimes stores with low sales volumes are maintained because of their strategic locations. The estimated number of stores by store type uses national averages for somewhat broad categories of stores. Automobile dealers, for example, include large new car dealers for the major automakers as well as small, local used car lots. Overall, the retail gap

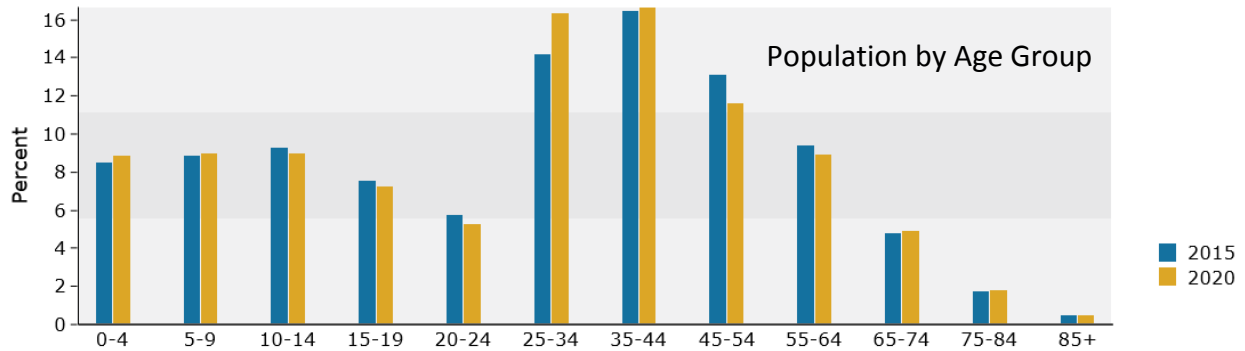
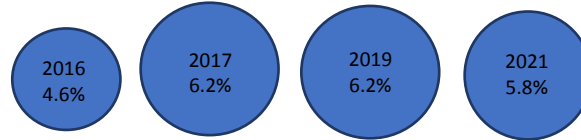
dollar amount is a more accurate indicator of the need for a particular kind of retail store in Forney than is the estimated number of stores that could be supported in Forney. However, the estimated gap in number of stores is easy to understand and is included to illustrate the estimated gap.

Forney Demographic Overview

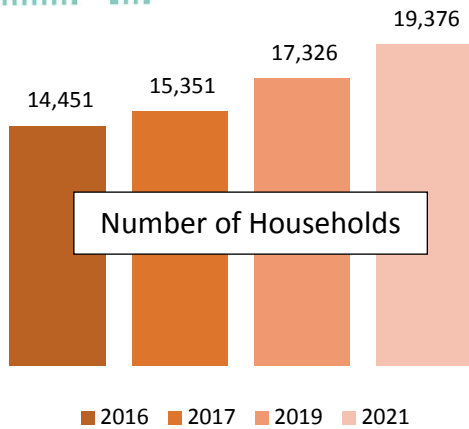


Population

Compound Annual Growth



Households



New Home Activity (Dec 2016)

Annual New Home Starts	831
Annual New Home Closings	651
Vacant Lots	1,059
Lots under Development	1,904
Preliminary/Future Lots	20,450
Total Potential Future Homesites	23,413
Median New Home Price	\$237,884
Total Single Family Lots	34,947



Income

Median Household Income:
\$90,049

Per Capita Income:
\$31,320

Recruiting Retailers

Forney is situated just outside the Dallas metropolitan area. This proximity to Dallas is discouraging to potential retailers looking to enter the Forney marketplace. These retailers assume the Forney market has already been saturated with an excess of retail supply. What these retailers do not understand, however, is the 30-minute drive Forney residents must undertake to go into Dallas, and that many residents choose to avoid this drive entirely. As shown throughout this report, the retail demand in Forney is met overwhelmingly by out-of-region sales.

There are many reliable sources that can be considered when trying to attract potential retailers. *“Developing Successful Retail in Secondary and Rural Markets,”* a study conducted by the International Council of Shopping Centers, lays out a 10-step process to successfully pitch your region to potential retailers:

1. Establish a profile of target merchant types and merchandise categories
2. Create a business fact base
3. Prepare an inventory of economic development tools
4. Assemble a database of space inventory and lease/purchase terms
5. Establish a merchant retail development committee
6. Hold broker roundtables and periodic update meetings
7. Initiate a series of local/regional prospecting trips
8. Prepare a customized “sales package” for each targeted retailer
9. Makes sales calls on qualified prospects
10. Establish follow-up contract/reminder program

Most, if not all, of the preparatory steps laid out above can be completed using the data provided in this report. While these steps lay out a good framework for any region, there are still characteristics unique to Forney. One of these characteristics is the retail demand provided by the Municipal Utility Districts (MUDs). Forney’s largest challenge will be to not undersell the demand found in their region and the surrounding MUDs.

Step 2, from the list above, can have a great impact on a retailer’s decision. Drawing again from *“Developing Successful Retail in Secondary and Rural Markets”* the business fact base should include but is not limited to:

1. Geographical description of drawing area or “trade area,” including high – and low – traffic times
2. Demographic and economic profiles of trade area population
3. Growth projections of trade area population
4. Overview of significant additional audiences
5. Annual retail trends
6. Sales performance of key categories
7. Summary of projects underway with costs, opening dates, and statements of anticipated impact on consumer spending

Forney has the tools, demand, and space for new retailers. With the criteria provided above, Forney can properly package and display these strengths to potential retailers.

In “*Developing Successful Retail in Undeserving Urban Markets*,” another study conducted by the International Council of Shopping Centers, retailers were surveyed about top factors when considering potential retail locations. The top five factors presented to retailers and the percentage of retailers that considered them to be a relevant factor to their site selection process are as follows:

1. Insufficient concentration on your customer target (88% considered this to be a relevant factor)
2. Length of time to complete the project (49% considered this to be a relevant factor)
3. Lack of consumer purchasing power for your product (86%)
4. Inadequate neighborhood infrastructure (73%)
5. Burdensome taxes relative to store locations (65%)

Retailers were focused mainly on the demographics of the considered market area. Factors like “project completion time” and “tax burdens” were considered by most retailers, but were not nearly as relevant as the economic and demographic profiles of the trade area. Forney can use this to their advantage when creating profiles of retailers to attract.

Site Selection Criteria by Type of Retail

Retailers use multiple methods to determine how they select their retail locations. Immediate trade area is defined by the market area from which retailers are pulling at least 75% of their sales. It is a geographical reference based on both potential and actual sales. Distance and drive time are factored in, but vary by industry and retailer. Retailers that consider population in the immediate trade area versus a specific distance or drive time study the market purchasing patterns of local residents. For most retailers, the primary market translates into a 10- to 15-minute drive time.

Each section has a figure that shows the number of establishments in Forney depicted as blue storefronts next to the estimated number of stores that could also be supported in Forney. These are depicted as green storefronts. It should be noted that the scale for blue storefronts is different than the scale for green storefronts. Each blue storefront represents 10 existing stores, while each green storefront represents 1 potential new store (except for miscellaneous retailers and restaurants – in both of these cases, each green storefront represents 10 potential new stores).

Car Dealerships

The car dealership industry specializes in selling new and used cars. There are 21 car dealership establishments within a 10-minute drive of Forney.

Site Selection

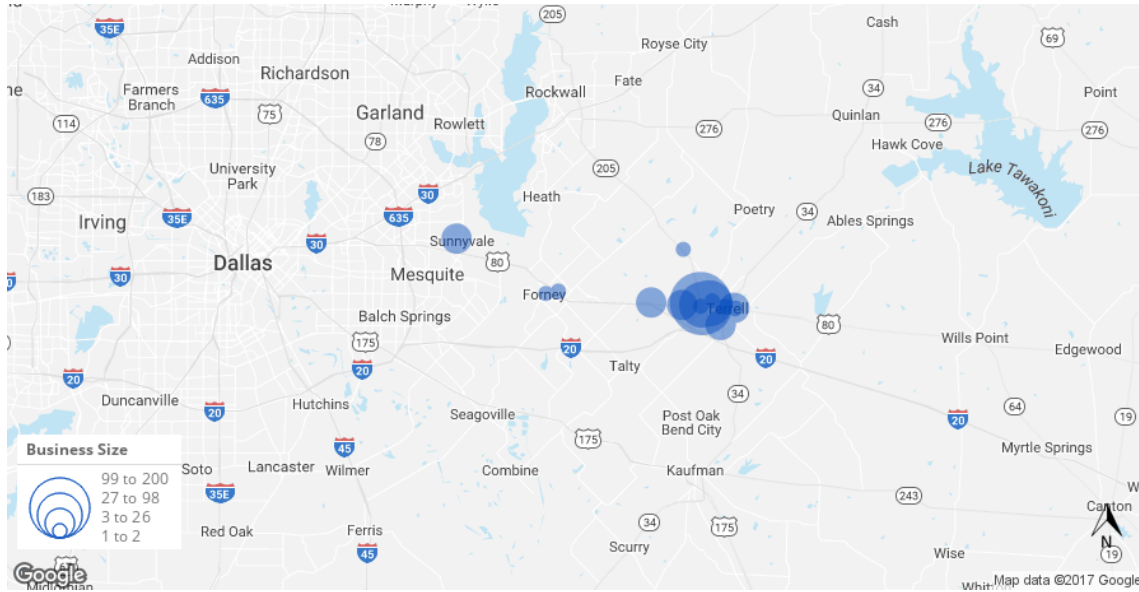
Car dealerships use an “immediate trade area” criteria for their site selection preferences. This criterion translates to a 10- to 15-minute drive time. This study incorporated a 10-minute drive time using a location in the heart of downtown Forney as the center point. Car dealerships looking to establish a business location in Forney can see where competitors are already located (Figure 1) and the number of establishments needed to meet regional demand (Figure 2).

Dealerships in small towns tend to sell 300 or fewer vehicles per year. At that low volume, it is difficult to justify marketing support, sales bonuses, consumer incentives, or the cost of carrying a floor plan. However, General Motors has long supported smaller stores in more rural areas, because these smaller, rural stores sell 80% of all the bigger pickup trucks. Nearly two-thirds of the sales of these stores are the larger pickup trucks (about 200 per store). These are high-margin vehicles, and sales of these trucks does support an otherwise low-volume store.

The larger trucks draw customers who will not normally drive into a large city to buy. These customers will drive to the next smaller town and buy whatever the dealer is selling. In other words, these are high-value sales to customers who have little brand preference other than for General Motors, Ford, or Chrysler, as most international brands do not have comparable vehicles. Another important consideration is that maintenance and service work are significant sources of revenue to smaller dealerships; this work also builds customer and brand loyalty. Sometimes the value to the automaker is the presence of a dealership and the service it provides more than the actual vehicle sales. Another consideration for smaller communities to consider is that international-brand dealerships may be hard to recruit because the international automakers value high volume dealerships; Toyota and Honda, for example, continue to lead all automakers in number of sales per franchise – more than 3 times the sales of American-brand franchises

In 2017, Chrysler announced that it intends to open 380 new stores. This is significant news and offers opportunities for communities across the country. Across all automakers, 571 new franchises were created in 2016.

Figure 1. Map of Car Dealerships Within a Ten-Minute Drive of Forney



Sources: Emsi 2017.1 dataset. InfoUSA. City of Forney.

Figure 2. Number of Establishments Not Adequately Represented Within a Ten-Minute Drive of Forney



Each blue storefront represents 10 retail establishments.

Sources: Emsi 2017.1 dataset. The U.S. Census of Retail Trade (2012). Emsi research.

Retailer Profile

Fiat Chrysler Automobiles (FCA) has 2,851 dealerships across the United States and is planning to incorporate 380 new dealerships in the United States by the end 2017. This would bring the total dealership count for FCA to 3,231 locations, the highest it has been since 2009. In 2016, FCA sold over \$121 billion in vehicles. Noe Randal Used Cars sells used Dodge and Ram vehicles and is located in Terrell, just over 14 minutes away. The closest new car FCA dealership is in Rockwall.

Auto Dealer Business Listings

Business Name	Primary NAICS Code	Industry Name	City, State	Business Size
Randall Noe Ford	441110	New Car Dealers	Terrell, TX	Medium (50-249)
Randall Noe Used Cars	441120	Used Car Dealers	Terrell, TX	Medium (50-249)
Wylie Musser Chevrolet Cad	441110	New Car Dealers	Terrell, TX	Medium (50-249)
Musser Chevrolet Cadillac	441110	New Car Dealers	Terrell, TX	Medium (50-249)
Randall Noe Chrysler Dodge	441110	New Car Dealers	Terrell, TX	Small (0-49)
J & M Truck Sales	441120	Used Car Dealers	Terrell, TX	Small (0-49)
Auto Mart	441120	Used Car Dealers	Mesquite, TX	Small (0-49)
Sale A & R Truck	441110	New Car Dealers	Terrell, TX	Small (0-49)
Chic Motor Co	441120	Used Car Dealers	Terrell, TX	Small (0-49)
Wylie Musser GMC Buick	441110	New Car Dealers	Terrell, TX	Small (0-49)
East Ridge Auto Sales	441120	Used Car Dealers	Forney, TX	Small (0-49)
Beene Motor Co	441120	Used Car Dealers	Forney, TX	Small (0-49)
Total Vehicle Financiers	441120	Used Car Dealers	Terrell, TX	Small (0-49)
Intergroup Auto Brokers	441120	Used Car Dealers	Forney, TX	Small (0-49)
Gigante Auto Group	441120	Used Car Dealers	Terrell, TX	Small (0-49)
Texas Best Pre-owned	441120	Used Car Dealers	Terrell, TX	Small (0-49)
Union Remarketing	441120	Used Car Dealers	Terrell, TX	Small (0-49)
B & V Auto Sales	441120	Used Car Dealers	Terrell, TX	Small (0-49)
Randall Noe Used Cars	441120	Used Car Dealers	Terrell, TX	Small (0-49)
Larken Motor Co	441120	Used Car Dealers	Terrell, TX	Small (0-49)
No Limit Motors	441120	Used Car Dealers	Terrell, TX	small (0-49)

Sources: Emsi 2017.1 dataset. InfoUSA. City of Forney.

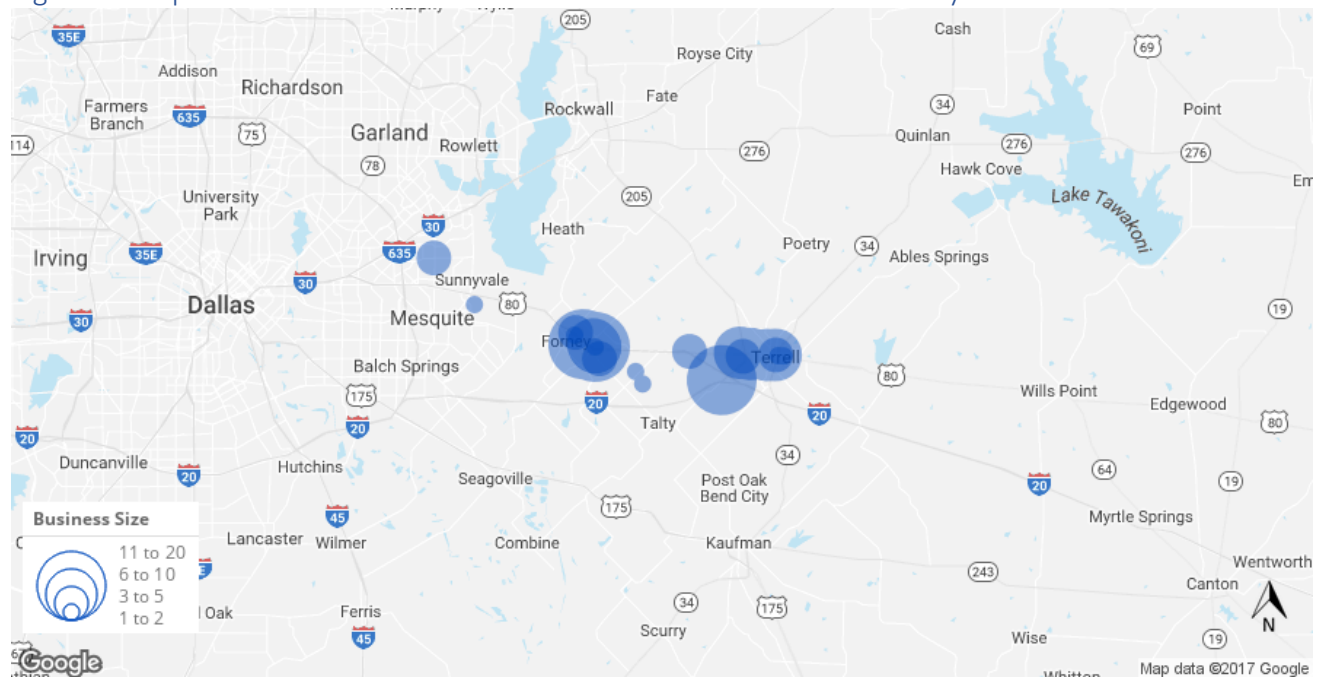
Vehicle Parts Dealers

Vehicle parts dealers specialize in selling auto “aftermarket” parts. These can be replacement parts for vehicle repairs or accessories (such as seat covers) for cars and trucks. There are 22 vehicle parts dealers within a 10-minute drive of Forney.

Site Selection

Vehicle parts stores use an “immediate trade area” criteria for their site selection preferences. This criterion translates to a 10- to 15-minute drive time. This study incorporated a 10-minute drive time using a location in the heart of downtown Forney as the center point. Vehicle parts retailers looking to establish a business location in Forney can see where competitors are already located (Figure 3) and the number of establishments needed to meet regional demand (Figure 4).

Figure 3. Map of Vehicle Parts Stores Within a Ten-Minute Drive of Forney



Sources: Emsi 2017.1 dataset. InfoUSA. City of Forney.

Figure 4. Number of Establishments Not Adequately Represented Within a Ten-Minute Drive of Forney



Each blue storefront represents 10 retail establishments.
 Sources: Emsi 2017.1 dataset. The U.S. Census of Retail Trade (2012). Emsi research.

Top Retailers in This Category

Retailer Profile

AutoZone has 5,006 locations across the United States and builds stores that are 6,800 to 7,300 square feet in size. They choose locations that are an in-line, end cap, or freestanding building located in either a strip center or community and neighborhood area. In 2016, AutoZone had over \$10 billion in sales. There are currently two AutoZone retail locations in Forney.

Business Listings

Business Name	Primary NAICS Code	Industry Name	City, State	Business Size
Automotive Toys & Accessories	441310	Automotive Parts and Accessories Stores	Forney, TX	Small (0-49)
Discount Tire	441320	Tire Dealers	Terrell, TX	Small (0-49)
Ntb-national Tire & Battery	441320	Tire Dealers	Forney, TX	Small (0-49)
Autozone	441310	Automotive Parts and Accessories Stores	Forney, TX	Small (0-49)
Autozone	441310	Automotive Parts and Accessories Stores	Terrell, TX	Small (0-49)
Walmart Tire & Lube Express	441320	Tire Dealers	Terrell, TX	Small (0-49)
Walmart Tire & Lube Express	441320	Tire Dealers	Forney, TX	Small (0-49)
O'reilly Auto Parts	441310	Automotive Parts and Accessories Stores	Forney, TX	Small (0-49)
O'reilly Auto Parts	441310	Automotive Parts and Accessories Stores	Terrell, TX	Small (0-49)
Napa Auto Parts-walts Automtv	441310	Automotive Parts and Accessories Stores	Terrell, TX	Small (0-49)
Performance Tire & Svc	441320	Tire Dealers	Forney, TX	Small (0-

				49)
Classic Auto Parts	441310	Automotive Parts and Accessories Stores	Forney, TX	Small (0-49)
East Texas Performance	441310	Automotive Parts and Accessories Stores	Terrell, TX	Small (0-49)
Ben's Discount Tire Store	441320	Tire Dealers	Mesquite, TX	Small (0-49)
NAPA Auto Parts	441310	Automotive Parts and Accessories Stores	Terrell, TX	Small (0-49)
Flanders-precisionaire	441310	Automotive Parts and Accessories Stores	Terrell, TX	Small (0-49)
Usa Tires	441320	Tire Dealers	Forney, TX	Small (0-49)
Filter Guy	441310	Automotive Parts and Accessories Stores	Sunnyvale, TX	Small (0-49)
Spoiler Express	441310	Automotive Parts and Accessories Stores	Forney, TX	Small (0-49)
Brooks Service Co	441310	Automotive Parts and Accessories Stores	Forney, TX	Small (0-49)
U Need A Battery	441310	Automotive Parts and Accessories Stores	Terrell, TX	Small (0-49)
Castillo's Tire Shop	441320	Tire Dealers	Terrell, TX	Small (0-49)

Sources: Emsi 2017.1 dataset. InfoUSA. City of Forney.

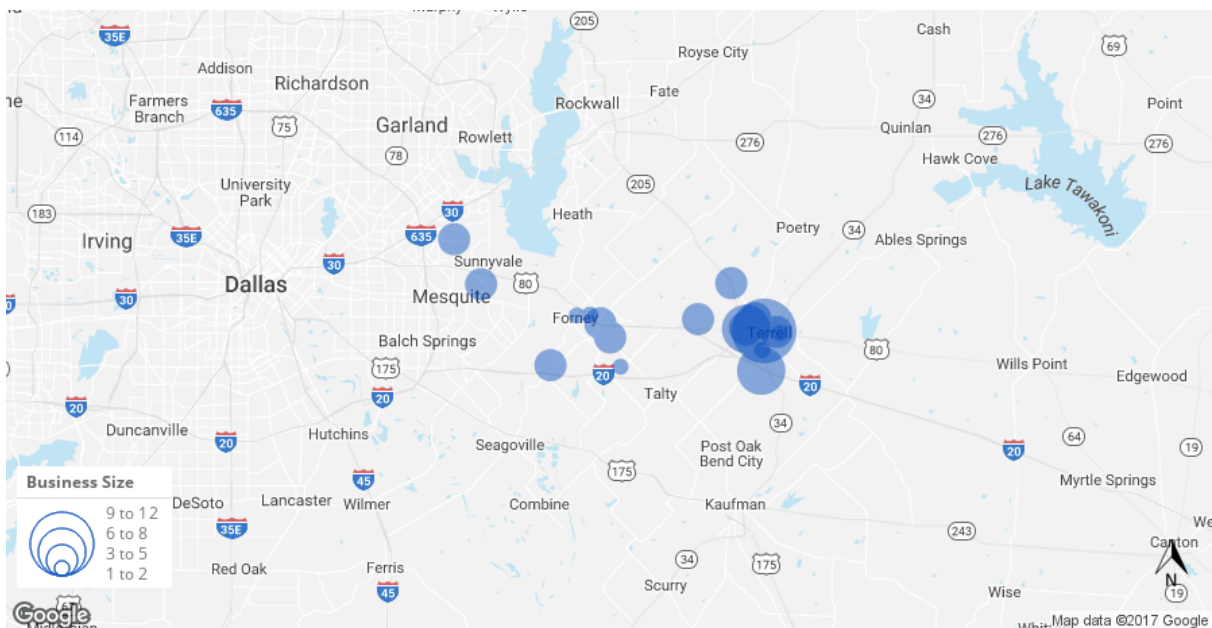
Furniture and Home Furnishings

Furniture and home furnishings stores specialize in selling a variety of home goods ranging from cookware to new furniture. These stores usually operate from showrooms and have substantial areas for the presentation of their products. Many offer interior decorating services in addition to the sale of products. Average per store sales fall in the range of \$1.5 million to \$2.0 million. There are 21 furniture and home furnishing establishments within a 10-minute drive of Forney.

Site Selection

Furniture and home furnishing retail stores use an “immediate trade area” criteria for their site selection preferences. This criterion translates to a 10- to 15-minute drive time. This study incorporated a 10-minute drive time using a location in the heart of downtown Forney as the center point. Furniture and home furnishing retail stores looking to establish a business location in Forney can see where competitors are already located (Figure 5) and the number of establishments needed to meet regional demand (Figure 6).

Figure 5. Map of Furniture and Home Furnishings Stores Within a Ten-Minute Drive of Forney



Sources: Emsi 2017.1 dataset. InfoUSA. City of Forney.

Figure 6. Number of Establishments Not Adequately Represented Within a Ten-Minute Drive of Forney



Each blue storefront represents 10 retail establishments.

Sources: Emsi 2017.1 dataset. The U.S. Census of Retail Trade (2012). Emsi research.

Top Retailers in This Category

The largest retail chains in the furniture industry include Ashley Furniture, Ikea, Williams-Sonoma (which operates Pottery Barn brands), Ethan Allen, Crate & Barrel, and several regional chains. In Forney, the Steve Silver Company is the largest retailer, with estimated annual sales at \$40 million.

Retailer Profiles

Ikea, one of the fastest-growing furniture retailers, operates more than 40 stores in the U.S. with several more slated to open in 2017. The nearest Ikea to Forney is in Frisco. Within the chain, store sizes vary considerably, from 300,000 square feet to more than double that. Worldwide, average store sales are about \$100 million per year. Corporate revenues are growing about 7% per year. As a comparison, the Walmart Company is about 12 times larger than Ikea.

Cost Plus World Market has 260 worldwide locations. They build new stores to be freestanding buildings with 18,000 square feet; World Market siting criteria include locating near other big box retailers, and in a power location or in a community/neighborhood area. Cost Plus World Market's parent company, Bed Bath & Beyond, had just over \$11.6 billion in sales last year. The closest Cost Plus World Market to Forney is located 22 miles away in Dallas.

Business Listings

Business Name	Primary NAICS Code	Industry Name	City, State	Business Size
Traylor Furniture	442110	Furniture Stores	Terrell, TX	Small (0-49)
Kitchen Collection	442299	All Other Home Furnishings Stores	Terrell, TX	Small (0-49)
Robinson's Furniture	442110	Furniture Stores	Terrell, TX	Small (0-49)
Rent-a-center	442110	Furniture Stores	Terrell, TX	Small (0-49)
Budget Blinds	442291	Window Treatment Stores	Terrell, TX	Small (0-49)
Mattresses Etc	442110	Furniture Stores	Terrell, TX	Small (0-49)
Rooneys Enterprises Inc	442210	Floor Covering Stores	Forney, TX	Small (0-49)
Brightest Bulbs	442299	All Other Home Furnishings Stores	Sunnyvale, TX	Small (0-49)
Sleep Experts	442110	Furniture Stores	Forney, TX	Small (0-49)
Williamson's Glass & Mirror	442299	All Other Home Furnishings Stores	Terrell, TX	Small (0-49)
Lady Shea's Hidden Treasures	442110	Furniture Stores	Terrell, TX	Small (0-49)
Delphi Cabinet Designs	442110	Furniture Stores	Forney, TX	Small (0-49)
C & C Carpet Supply	442210	Floor Covering Stores	Mesquite, TX	Small (0-49)
Furniture One	442110	Furniture Stores	Terrell, TX	Small (0-49)
Yarbrough Furniture Designs	442110	Furniture Stores	Terrell, TX	Small (0-49)
Low Budget Blinds	442291	Window Treatment Stores	Terrell, TX	Small (0-49)
Obvious Improvement Co	442210	Floor Covering Stores	Forney, TX	Small (0-49)
Abbey Interiors	442210	Floor Covering Stores	Forney, TX	Small (0-49)
En Style Shutters & Blinds	442291	Window Treatment Stores	Forney, TX	Small (0-49)
Schindler Carpet & Floors	442210	Floor Covering Stores	Forney, TX	Small (0-49)
Wendy Stevens	442299	All Other Home Furnishings Stores	Terrell, TX	Small (0-49)

Sources: Emsi 2017.1 dataset. InfoUSA. City of Forney.

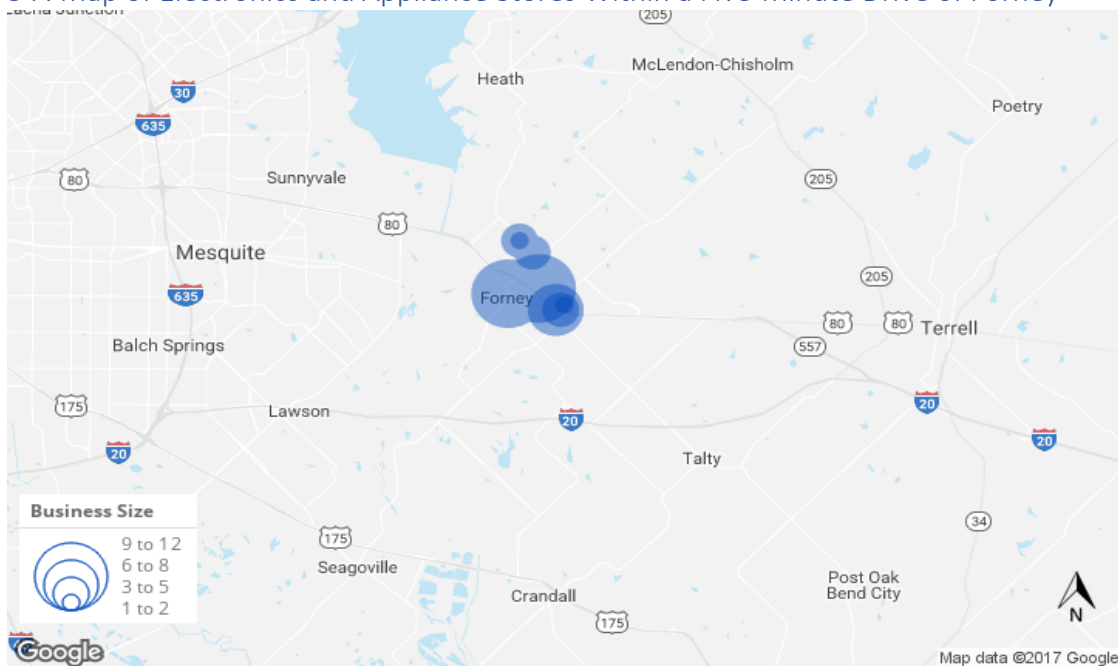
Electronics and Appliances

The electronics and appliance industry specializes in selling a variety of electronic goods ranging from phones to dishwashers and TVs. There are 10 electronics and appliance furnishing establishments within a five-minute drive of Forney.

Site Selection

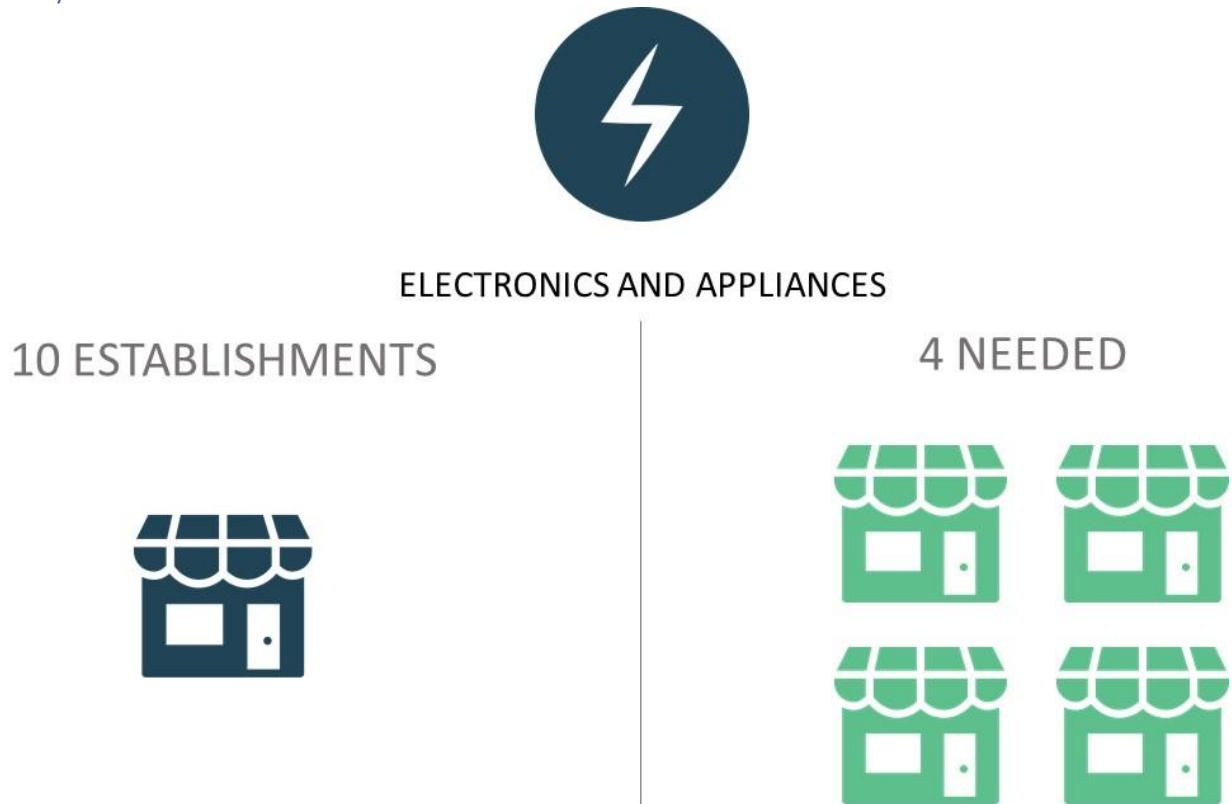
Electronics and appliance stores use a five-minute drive time criteria for their site selection preferences. This study incorporated the five-minute drive time using a location in the heart of downtown Forney as the center point. Electronics and appliance stores looking to establish a business location in Forney can see where competitors are already located (Figure 7) and the number of establishments needed to meet regional demand (Figure 8).

Figure 7. Map of Electronics and Appliance Stores Within a Five-Minute Drive of Forney



Sources: Emsi 2017.1 dataset. InfoUSA. City of Forney.

Figure 8. Number of Establishments Not Adequately Represented Within a Five-Minute Drive of Forney



Each blue storefront represents 10 retail establishments.

Sources: Emsi 2017.1 dataset. The U.S. Census of Retail Trade (2012). Emsi research.

Top Retailers in This Category

Best Buy, Amazon, Game Stop, Apple Stores, AT&T, and Verizon.

Retailer Profile

Best Buy has over 3,000 worldwide locations. Best Buy has been closing and opening stores at almost equal rates over the last couple of years. Their strategy is focused on extreme cost-cutting. Locations that are now too large or not selling at high volumes are being closed, while new stores may be opened at higher traffic locations nearby. Best Buy had over \$39 billion in sales last year. The closest Best Buy location to Forney is 10 miles away just outside of Dallas.

Business Listings

Business Name	Primary NAICS Code	Industry Name	City, State	Business Size
Identifier Pegasus Computers	443142	Electronics Stores	Forney, TX	Small (0-49)
AT&T Authorized Retailer	443142	Electronics Stores	Forney, TX	Small (0-49)
Walmart Connection Ctr	443142	Electronics Stores	Forney, TX	Small (0-49)
Outside Sales	443142	Electronics Stores	Forney, TX	Small (0-49)
Tech Shark Wireless Repair	443143	Electronics Stores	Forney, TX	Small (0-49)
Sprint Store	443144	Electronics Stores	Forney, TX	Small (0-49)
Game Stop	443145	Electronics Stores	Forney, TX	Small (0-49)
Metro PCS	443146	Electronics Stores	Forney, TX	Small (0-49)
Forney Computer Repair	443147	Electronics Stores	Forney, TX	Small (0-49)
Birdman Kuston Electronics	443148	Electronics Stores	Forney, TX	Small (0-49)

Sources: Emsi 2017.1 dataset. InfoUSA. City of Forney.

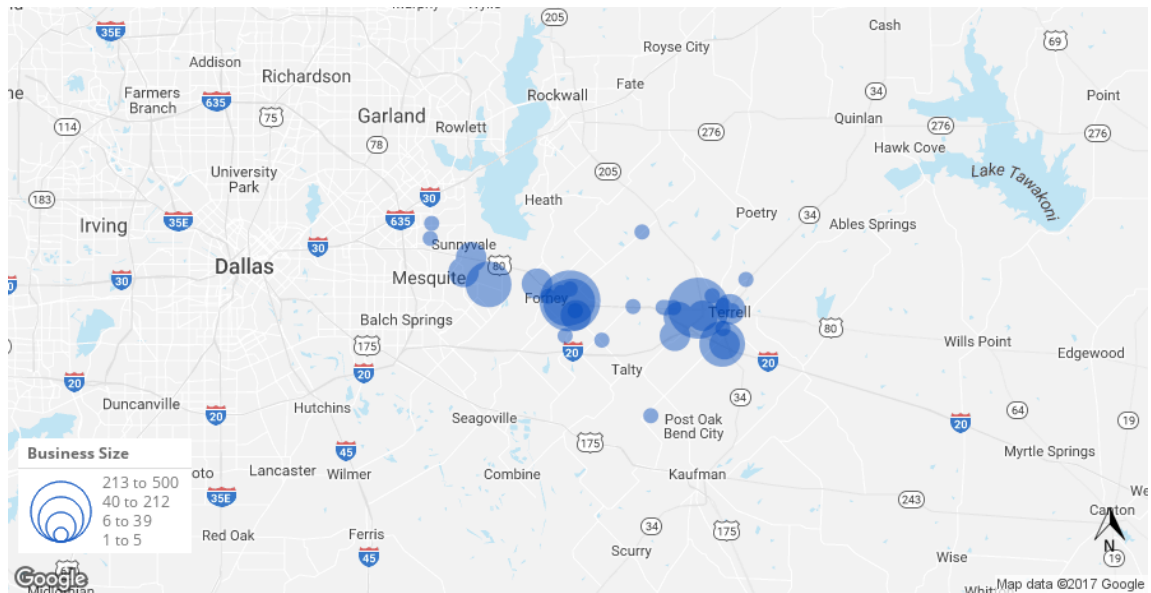
Building Material, Garden Equipment, Supplies

Building material, garden equipment, supplies stores sell garden and building supplies ranging from garden rakes and shovels to lumber and power tools. There are 35 building material, garden equipment, and supplies establishments within a 10-minute drive of Forney.

Site Selection

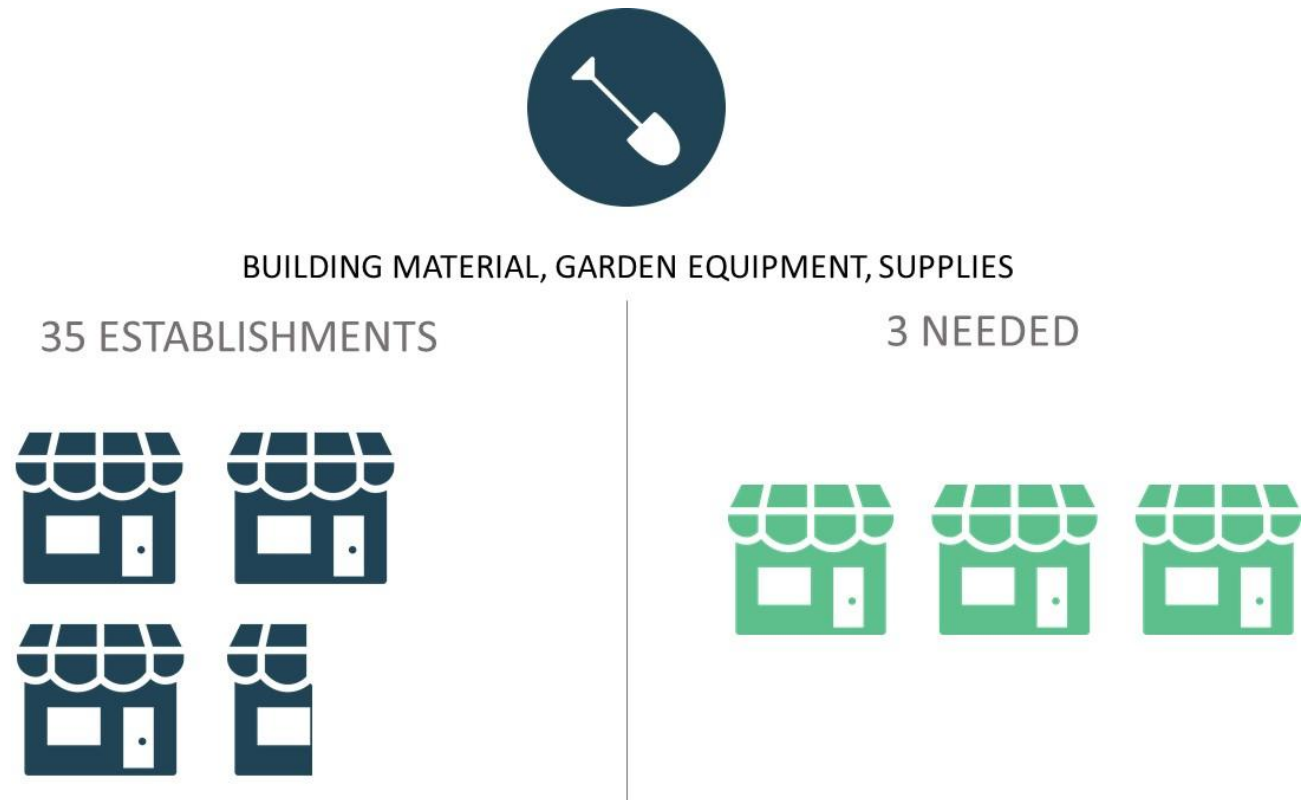
Building material, garden equipment, supplies retail stores use an “immediate trade area” criteria for their site selection preferences. This criterion translates to a 10- to 15-minute drive time. This study incorporated a 10-minute drive time using a location in the heart of downtown Forney as its center point. Building material, garden equipment, supplies retail stores looking to establish a business location in Forney can see where locations are already located (Figure 9) and the number of establishments needed to meet regional demand (Figure 10).

Figure 9. Building Material, Garden Equipment, Supplies Stores Within a Ten-Minute Drive of Forney



Sources: Emsi 2017.1 dataset. InfoUSA. City of Forney.

Figure 10. Number of Establishments Not Adequately Represented Within a Ten-Minute Drive of Forney



Each blue storefront represents 10 retail establishments.
 Sources: Emsi 2017.1 dataset. The U.S. Census of Retail Trade (2012). Emsi research.

Top Retailers in This Category

Lowes, Home Depot, Do it Best, Sherwin Williams, JELD-WEN, and PPG Industries.

Retailer Profile

Home Depot has 2,274 worldwide locations. They build stores in areas that have 50,000 people living in the immediate trade area. Their site criteria include that the location is a 10-acre site, and will be a freestanding power location. Home Depot had over \$88 billion in sales last year. The closest Home Depot to Forney is located 13 miles away, just outside of Terrell.

Business Listings

Business Name	Primary NAICS Code	Industry Name	City, State	Business Size
Walmart Supercenter	444120	Paint and Wallpaper Stores	Terrell, TX	Large (250+)
Walmart Supercenter	444120	Paint and Wallpaper Stores	Forney, TX	Large (250+)
Lowe's Home Improvement	444110	Home Centers	Forney, TX	Medium (50-249)
Home Depot	444110	Home Centers	Terrell, TX	Medium (50-

				249)
Associated Truss & Lumber Co	444190	Other Building Material Dealers	Mesquite, TX	Medium (50-249)
Mitchell & Bourland	444210	Outdoor Power Equipment Stores	Terrell, TX	Small (0-49)
Cassity Jones Lumber & Home	444190	Other Building Material Dealers	Terrell, TX	Small (0-49)
Dallworth Glass Co Inc	444190	Other Building Material Dealers	Mesquite, TX	Small (0-49)
McCoy's Building Supply Ctr	444110	Home Centers	Terrell, TX	Small (0-49)
Lone Star Shutters	444190	Other Building Material Dealers	Forney, TX	Small (0-49)
Pro Access Distributing	444190	Other Building Material Dealers	Mesquite, TX	Small (0-49)
Homesley Nursery & Landscape	444220	Nursery, Garden Center, and Farm Supply Stores	Forney, TX	Small (0-49)
Elite Auto Glass	444190	Other Building Material Dealers	Terrell, TX	Small (0-49)
Mc Ginty's Hardware & Lumber	444110	Home Centers	Terrell, TX	Small (0-49)
Kelly-Moore Paint Co	444120	Paint and Wallpaper Stores	Sunnyvale, TX	Small (0-49)
Terrell Lawn Mower Repair	444210	Outdoor Power Equipment Stores	Terrell, TX	Small (0-49)
Glass Doctor	444190	Other Building Material Dealers	Forney, TX	Small (0-49)
Epic Glass & Building Svc Inc	444190	Other Building Material Dealers	Terrell, TX	Small (0-49)
Mason Glass & Mirror Llc	444190	Other Building Material Dealers	Forney, TX	Small (0-49)
J & T Nursery & Landscaping	444220	Nursery, Garden Center, and Farm Supply Stores	Terrell, TX	Small (0-49)
Garland Sprinkler-foundation	444220	Nursery, Garden Center, and Farm Supply Stores	Forney, TX	Small (0-49)
Sams Outdoor Living	444220	Nursery, Garden Center, and Farm Supply Stores	Forney, TX	Small (0-49)
AAA Garage Door & Opener	444190	Other Building Material Dealers	Forney, TX	Small (0-49)
SGS Hardware	444130	Hardware Stores	Forney, TX	Small (0-49)
AAA Garage Door & Opener	444190	Other Building Material Dealers	Terrell, TX	Small (0-49)
DFW Siding & Patio	444190	Other Building Material Dealers	Forney, TX	Small (0-49)
Garage Door Repair Forney	444190	Other Building Material Dealers	Forney, TX	Small (0-49)
Dallas Bath & Glass	444190	Other Building Material Dealers	Terrell, TX	Small (0-49)
Wilson Garage Doors	444190	Other Building Material Dealers	Terrell, TX	Small (0-49)
Sherwin-Williams	444120	Paint and Wallpaper Stores	Terrell, TX	Small (0-49)
PPG Paints	444120	Paint and Wallpaper Stores	Mesquite, TX	Small (0-49)
Lawrence Building Materials Co	444190	Other Building Material Dealers	Terrell, TX	Small (0-49)
E-Tex Auto Glass	444190	Other Building Material Dealers	Terrell, TX	Small (0-49)
Stained Glass By Debbie	444190	Other Building Material Dealers	Terrell, TX	Small (0-49)
Overhead Door Co Of Terrell	444190	Other Building Material Dealers	Terrell, TX	Small (0-49)

Sources: Emsi 2017.1 dataset. InfoUSA. City of Forney.

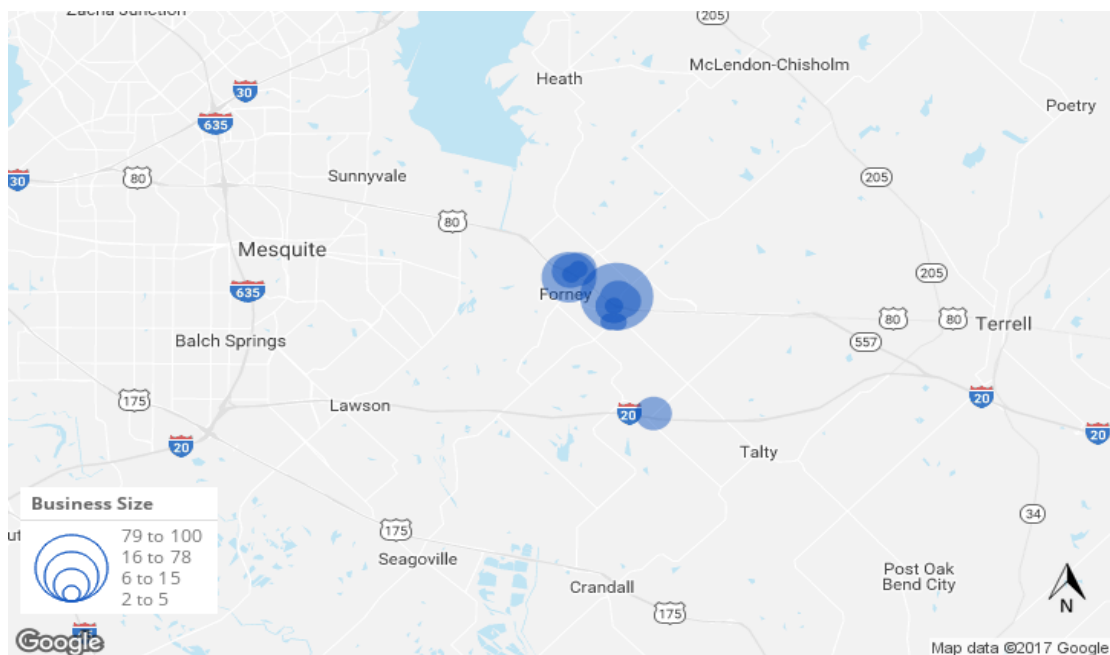
Food and Beverage Stores

Food and beverage stores sell edible goods for both in-store and out-of-store consumption. This category includes specialty food stores, grocery stores, and other food-related stores. There are 17 food and beverage stores within a three-minute drive of downtown Forney.

Site Selection

Food and beverage stores use a three-minute drive time criteria for their site selection preferences. This study incorporated the three-minute drive time using a location in the heart of downtown Forney as the center point. Food and beverage stores looking to establish a business location in Forney can see where competitors are already located (Figure 11) and the number of establishments needed to meet regional demand (Figure 12).

Figure 11. Map of Food and Beverage Stores Within a Three-Minute Drive of Forney



Sources: Emsi 2017.1 dataset. InfoUSA. City of Forney.

Figure 12. Number of Establishments Not Adequately Represented Within a Three-Minute Drive of Forney



Each blue storefront represents 10 retail establishments.

Sources: Emsi 2017.1 dataset. The U.S. Census of Retail Trade (2012). Emsi research.

Top Retailers in This Category

Walmart, WinCo, Costco, Fred Meyer, Giant, Whole Foods, and Safeway are a few of many large nationwide retailers in this category.

Retailer Profile

Walmart has over 5,000 worldwide locations. When choosing store locations, Walmart focuses on logistics and minimizing shipping costs. The number of people and the local GRP are considered, but logistics are the priority. Walmart sales were over \$481 billion last year. The closest Walmart is in Forney and is two miles from downtown.

Business Listings

Business Name	Primary NAICS Code	Industry Name	City, State	Business Size
Kroger Marketplace	445110	Supermarkets and Other Grocery (except Convenience) Stores	Forney, TX	Medium (50-249)
Brookshire's	445110	Supermarkets and Other Grocery (except Convenience) Stores	Forney, TX	Medium (50-249)
Kul Water	445299	All Other Specialty Food Stores	Forney, TX	Small (0-49)
Aldi	445110	Supermarkets and Other Grocery (except Convenience) Stores	Forney, TX	Small (0-49)
Food-fast	445120	Convenience Stores	Forney, TX	Small (0-49)
Sweet Frog	445299	All Other Specialty Food Stores	Forney, TX	Small (0-49)
7-Eleven	445120	Convenience Stores	Forney, TX	Small (0-49)
Bubble + Squeak Craft Beer + Wine – Forney	445120	Convenience Stores	Forney, TX	Small (0-49)
Murphy Usa	445120	Convenience Stores	Forney, TX	Small (0-49)
Jack's Quick Stop/Taco Casa	445120	Convenience Stores	Forney, TX	Small (0-49)
Shray Store LLC	445120	Convenience Stores	Forney, TX	Small (0-49)
Cefco	445120	Convenience Stores	Forney, TX	Small (0-49)
Jackrabbit Quick Stop - Conv. Store.	445121	Convenience Stores	Forney, TX	Small (0-49)
7-Eleven	445122	Convenience Stores	Forney, TX	Small (0-49)
7-Eleven	445123	Convenience Stores	Forney, TX	Small (0-49)
Xpress Travel Center – Conv. Store	445124	Convenience Stores	Forney, TX	Small (0-49)
Food Fast – Conv. Store	445125	Convenience Stores	Forney, TX	Small (0-49)

Sources: Emsi 2017.1 dataset. InfoUSA. City of Forney.

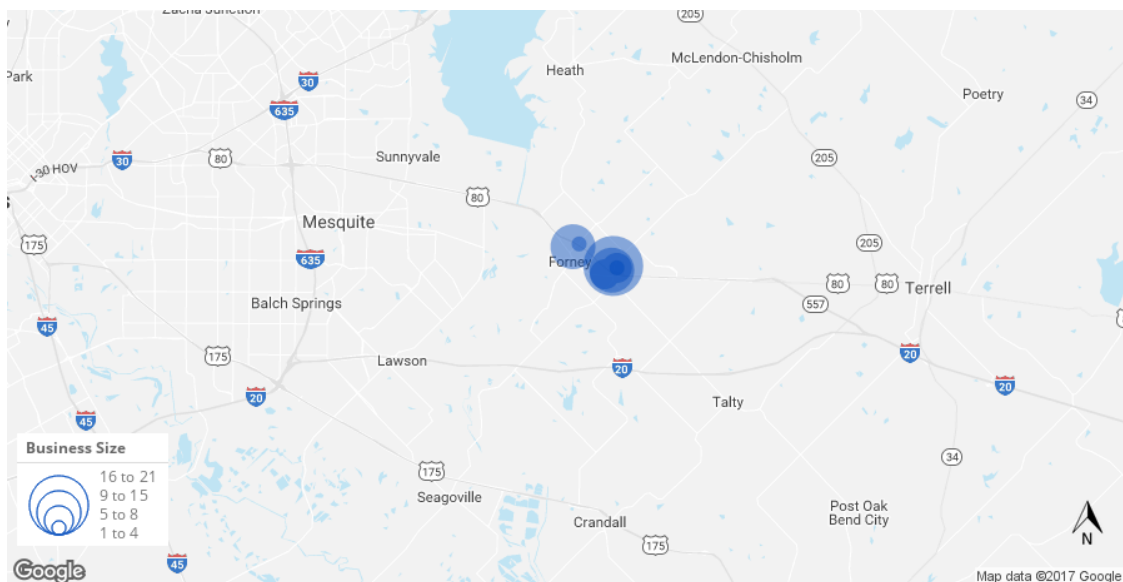
Health and Personal Care Stores

Health and personal care retailers sell products such as hair care and personal hygiene products. Most stores also offer a pharmacy. There are seven health and personal care retail locations within a three-minute drive of Forney.

Site Selection

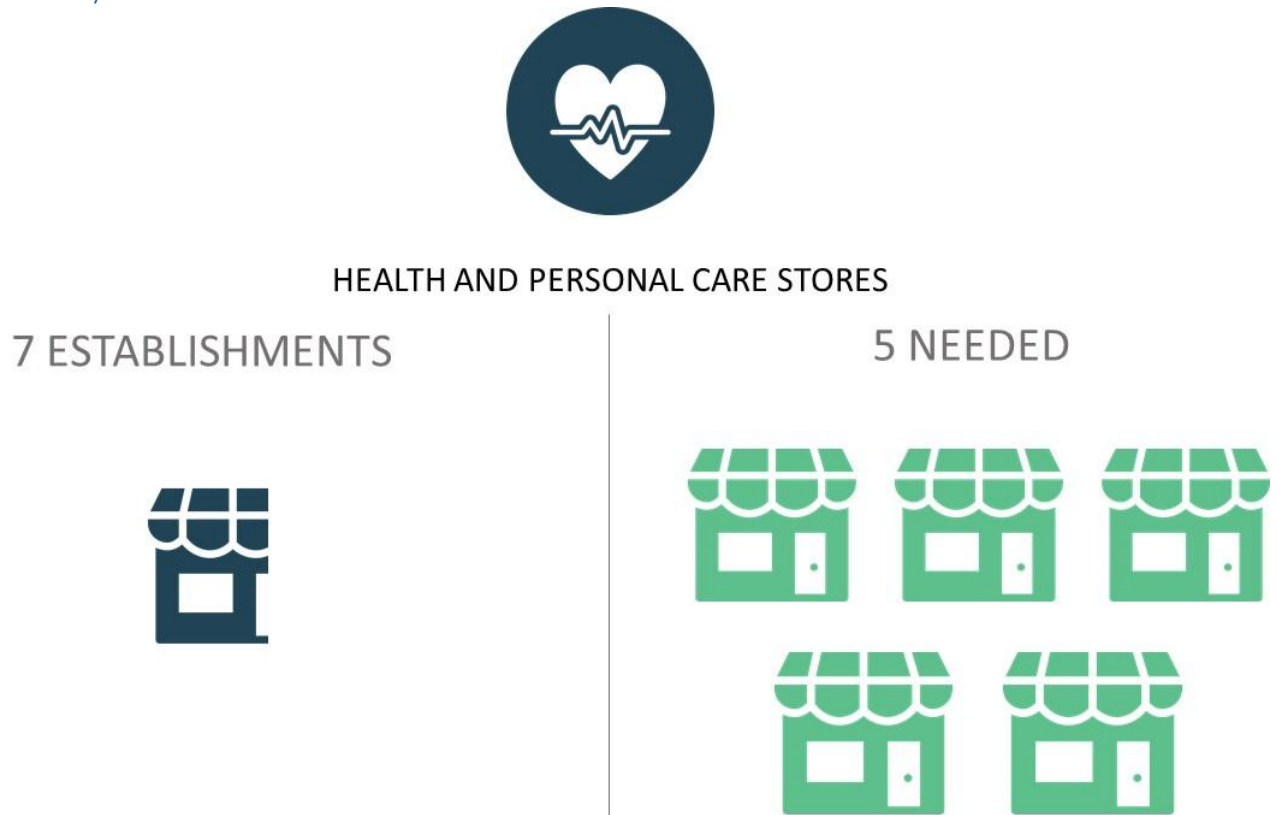
Health and personal care stores use a three-minute drive time criteria for their site selection preferences. This study incorporated the three-minute drive time using a location in the heart of downtown Forney as the center point. Health and personal care stores looking to establish a business location in Forney can see where competitors are already located (Figure 13) and the number of establishments needed to meet regional demand (Figure 14).

Figure 13. Health and Personal Care Stores Within a Three-Minute Drive of Forney



Sources: Emsi 2017.1 dataset. InfoUSA. City of Forney.

Figure 14. Number of Establishments Not Adequately Represented Within a Three-Minute Drive of Forney



Each blue storefront represents 10 retail establishments.

Sources: Emsi 2017.1 dataset. The U.S. Census of Retail Trade (2012). Emsi research.

Top Retailers in This Category

Walgreens, Rite Aid, CVS Pharmacy.

Retailer Profile

CVS Pharmacy has 9,600 worldwide locations. New locations should have at least 15,000 people residing within a one-mile radius. New stores are built to be between 12,000 and 15,000 square feet and are built as freestanding locations. The CVS Pharmacy parent company, CVS Health, sold over \$177 billion last year. The closest CVS Pharmacy is in Forney, 1.6 miles from downtown.

Business Listings

Business Name	Primary NAICS Code	Industry Name	City, State	Business Size
Walgreens	446110	Pharmacies and Drug Stores	Forney, TX	Small (0-49)
CVS/Pharmacy	446110	Pharmacies and Drug Stores	Forney, TX	Small (0-49)
Brookshire's Pharmacy	446110	Pharmacies and Drug Stores	Forney, TX	Small (0-49)
Walmart Pharmacy	446110	Pharmacies and Drug Stores	Forney, TX	Small (0-49)
Forney Hearing Ctr	446199	All Other Health and Personal Care Stores	Forney, TX	Small (0-49)
Walmart Vision Ctr	446130	Optical Goods Stores	Forney, TX	Small (0-49)
Merle Norman Cosmetic Studio	446120	Cosmetics, Beauty Supplies, and Perfume Stores	Forney, TX	Small (0-49)

Sources: Emsi 2017.1 dataset. InfoUSA. City of Forney.

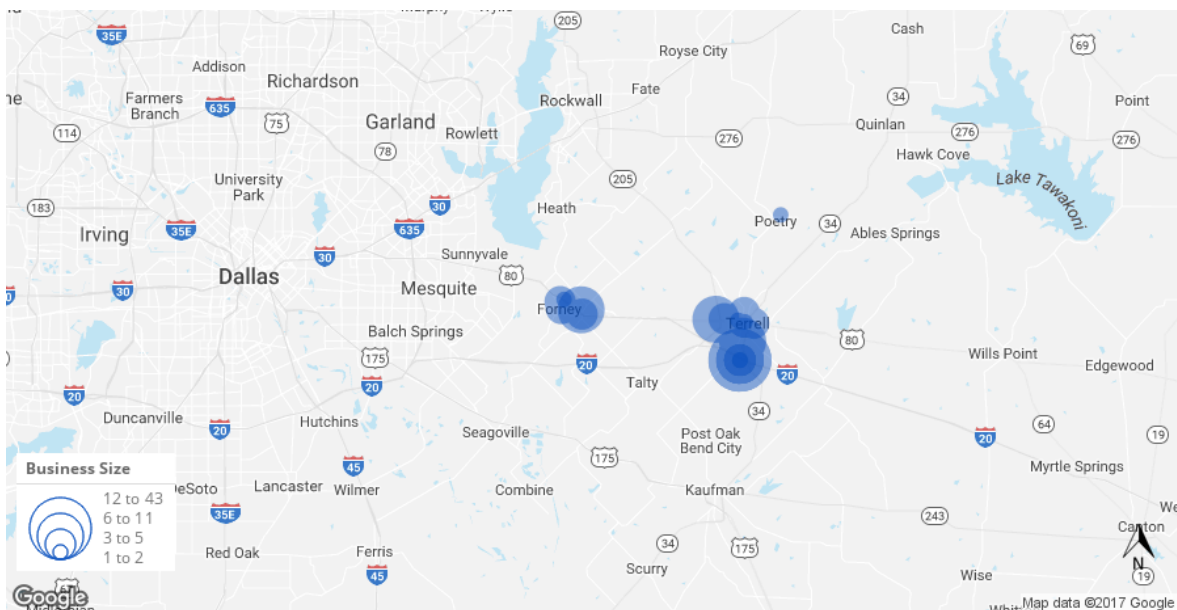
Clothing and Accessories

Clothing and accessories retailers specialize in selling men’s, women’s, and children’s apparel, shoes, and accessories. There are 40 clothing and accessories stores within a 10-minute drive of Forney.

Site Selection

Clothing and accessories stores use an “immediate trade area” criteria for their site selection preferences. This criterion translates to a 10- to 15-minute drive time. This study incorporated a 10-minute drive time using a location in the heart of downtown Forney as the center point. Clothing and accessories retailers looking to establish a business location in Forney can see where competitors are already located (Figure 15) and the number of establishments needed to meet regional demand (Figure 16).

Figure 15. Clothing and Accessories Stores Within a Ten-Minute Drive of Forney



Sources: Emsi 2017.1 dataset. InfoUSA. City of Forney.

Figure 16. Number of Establishments Not Adequately Represented Within a Ten-Minute Drive of Forney



Each blue storefront represents 10 retail establishments.

Sources: Emsi 2017.1 dataset. The U.S. Census of Retail Trade (2012). Emsi research.

Top Retailers in This Category

Gap Inc., Amazon, H&M, Sketchers, ROSS, North Face, Lululemon, and Maurices.

Retailer Profile

Gap Inc. includes the retailers GAP, Banana Republic, Old Navy, Intermix, Piperlime, and Athletica. Gap Inc. owns almost 3,700 worldwide locations. Gap Inc. had just over \$15.5 billion in sales last year. The closest Gap Inc. retailer to Forney is a Gap clothing store located 12 miles away in Terrell.

Business Listings

Business Name	Primary NAICS Code	Industry Name	City, State	Business Size
Nike Factory Store	448210	Shoe Stores	Terrell, TX	Small (0-49)
Justice	448130	Children's and Infants' Clothing	Terrell, TX	Small (0-49)
Dress Barn	448120	Women's Clothing Stores	Terrell, TX	Small (0-49)
Bass Co	448210	Shoe Stores	Terrell, TX	Small (0-49)
Famous Footwear Outlet	448210	Shoe Stores	Terrell, TX	Small (0-49)
Carter's	448130	Children's and Infants' Clothing	Terrell, TX	Small (0-49)
Torrid	448120	Women's Clothing Stores	Terrell, TX	Small (0-49)
Maurices	448140	Family Clothing Stores	Terrell, TX	Small (0-49)
Van Heusen	448110	Men's Clothing Stores	Terrell, TX	Small (0-49)
Fred Meyer Jewelers	448310	Jewelry Stores	Forney, TX	Small (0-49)
Jockey Store	448190	Other Clothing Stores	Terrell, TX	Small (0-49)
Cato	448120	Women's Clothing Stores	Terrell, TX	Small (0-49)
Payless Shoe Source	448210	Shoe Stores	Terrell, TX	Small (0-49)
Crocs Inc	448210	Shoe Stores	Terrell, TX	Small (0-49)
Risingers Country Store	448140	Family Clothing Stores	Terrell, TX	Small (0-49)
Wilson Leathers	448150	Clothing Accessories Stores	Terrell, TX	Small (0-49)
Claire's	448150	Clothing Accessories Stores	Terrell, TX	Small (0-49)
Uniform Destination	448190	Other Clothing Stores	Terrell, TX	Small (0-49)
Haggar Clothing Co	448110	Men's Clothing Stores	Terrell, TX	Small (0-49)
Bon Worth	448120	Women's Clothing Stores	Terrell, TX	Small (0-49)
Rancher's Wife	448120	Women's Clothing Stores	Terrell, TX	Small (0-49)
Shabby To Chik	448120	Women's Clothing Stores	Terrell, TX	Small (0-49)
Golden Jewelers	448310	Jewelry Stores	Forney, TX	Small (0-49)
En Lavogue	448120	Women's Clothing Stores	Terrell, TX	Small (0-49)
Annie's Boutique & Accessories	448120	Women's Clothing Stores	Terrell, TX	Small (0-49)
Prilekett's Jewelry Cristina	448310	Jewelry Stores	Terrell, TX	Small (0-49)
Doxa	448310	Jewelry Stores	Forney, TX	Small (0-49)
Chic & Sassy	448120	Women's Clothing Stores	Forney, TX	Small (0-49)
Sas Factory Shoe Stores	448210	Shoe Stores	Terrell, TX	Small (0-49)
Skelton's Skurban Wear	448140	Family Clothing Stores	Terrell, TX	Small (0-49)
Mother Goose	448130	Children's and Infants' Clothing	Terrell, TX	Small (0-49)
Unique Fashions	448140	Family Clothing Stores	Terrell, TX	Small (0-49)
Pritchett's Jewelry Casting Co	448310	Jewelry Stores	Terrell, TX	Small (0-49)
My Spa	448120	Women's Clothing Stores	Forney, TX	Small (0-49)
C & M Sportswear	448140	Family Clothing Stores	Terrell, TX	Small (0-49)
Embroidery Unlimited	448190	Other Clothing Stores	Terrell, TX	Small (0-49)
Groovy's	448	Clothing Store	Forney, TX	Small (0-49)
Whimsy Boutique	448	Clothing Store	Forney, TX	Small (0-49)
Factory Girl	448	Clothing Store	Forney, TX	Small (0-49)
Forney Embroidery	448	Clothing Store	Forney, TX	Small (0-49)

Sources: Emsi 2017.1 dataset. InfoUSA. City of Forney.

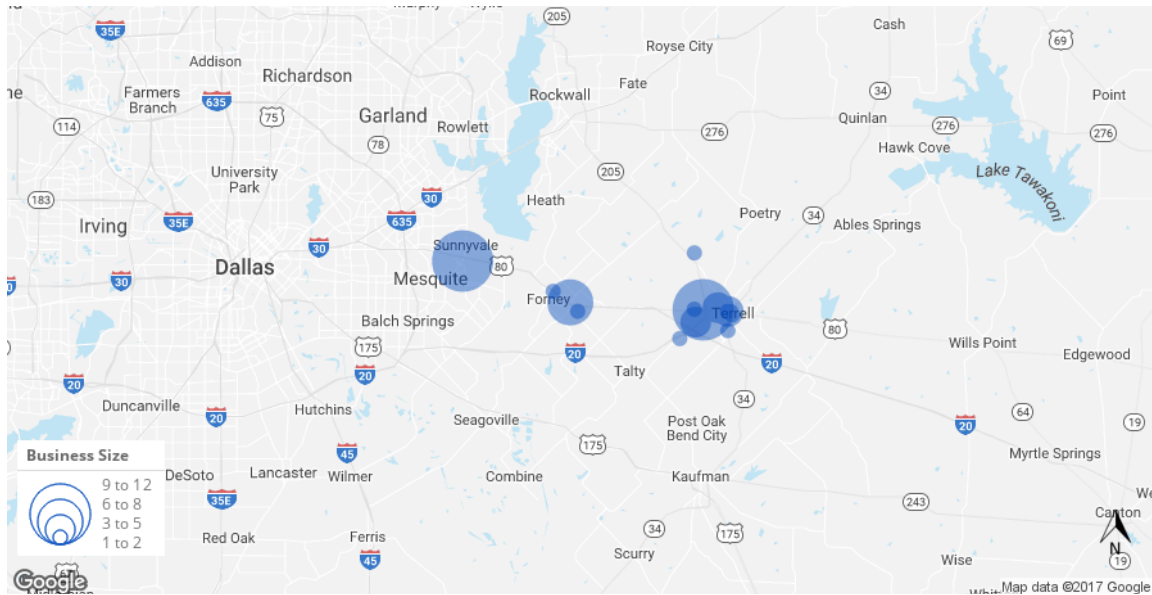
Sporting Goods, Hobby, Musical Instrument, and Book Stores

The sporting goods, hobby, musical instrument, or book retail industry specializes in selling athletic goods, recreational goods, instruments and music supplies, and new and used books. There are 16 sporting goods, hobby, musical instrument, or book retail establishments within a 10-minute drive of Forney.

Site Selection

Sporting goods, hobby, musical instrument, or book retailers use an “immediate trade area” criteria for their site selection preferences. This criterion translates to a 10- to 15-minute drive time. This study incorporated a 10-minute drive time using a location in the heart of downtown Forney as the center point. Sporting goods, hobby, musical instrument, and book retailers looking to establish a business location in Forney can see where competitors are already located (Figure 17) and the number of establishments needed to meet regional demand (Figure 18).

Figure 17. Sporting Goods, Hobby, Musical Instrument, and Book Stores Within a Ten-Minute Drive of Forney



Sources: Emsi 2017.1 dataset. InfoUSA. City of Forney.

Figure 18. Number of Establishments Not Adequately Represented Within a Ten-Minute Drive of Forney



Each blue storefront represents 10 retail establishments.

Sources: Emsi 2017.1 dataset. The U.S. Census of Retail Trade (2012). Emsi research.

Top Retailers in This Category

Dicks Sporting Goods, Sports Authority, Amazon, Barnes & Noble, Pro Image, Cabela's, Bass Pro Shop, and Big 5.

Retailer Profile

Dicks Sporting Goods has 610 worldwide locations and prefers that their new locations be in a region where the median household income is at least \$70,000. They build new stores with a space of 50,000 square feet. Preferred store locations are situated as an in-line, mall, end cap or power location. Dicks Sporting Goods had just over \$7 billion in sales last year. The closest Dicks Sporting Goods to Forney is located 13 miles away in Rockwall.

Business Listings

Business Name	Primary NAICS Code	Industry Name	City, State	Business Size
Geneva Corp	451212	News Dealers and Newsstands	Sunnyvale, TX	Small (0-49)
Saws Inc	451110	Sporting Goods Stores	Sunnyvale, TX	Small (0-49)
Gamestop	451120	Hobby, Toy, and Game Stores	Terrell, TX	Small (0-49)
Gamestop	451120	Hobby, Toy, and Game Stores	Forney, TX	Small (0-49)
Award Music Inc	451140	Musical Instrument and Supplies	Terrell, TX	Small (0-49)
Books & Crannies	451211	Book Stores	Terrell, TX	Small (0-49)
Bakes Smokin Gun	451110	Sporting Goods Stores	Terrell, TX	Small (0-49)
Oak Grove Country Club Pro Shop	451110	Sporting Goods Stores	Terrell, TX	Small (0-49)
Roll Of Fabrics	451130	Sewing, Needlework, and Piece Goods Stores	Forney, TX	Small (0-49)
Exxtreme Pro Shop	451110	Sporting Goods Stores	Terrell, TX	Small (0-49)
Mccay's Cycles	451110	Sporting Goods Stores	Terrell, TX	Small (0-49)
Terrell Gun Repair & Reloading	451110	Sporting Goods Stores	Terrell, TX	Small (0-49)
Jeff Smith's Custom Saddles	451110	Sporting Goods Stores	Terrell, TX	Small (0-49)
All N One Sports & Trophy	451110	Sporting Goods Stores	Terrell, TX	Small (0-49)
Gotta Have Guns	451110	Sporting Goods Stores	Forney, TX	Small (0-49)
B & B Guns & More	451110	Sporting Goods Stores	Terrell, TX	Small (0-49)

Sources: Emsi 2017.1 dataset. InfoUSA. City of Forney.

Miscellaneous and General Retail

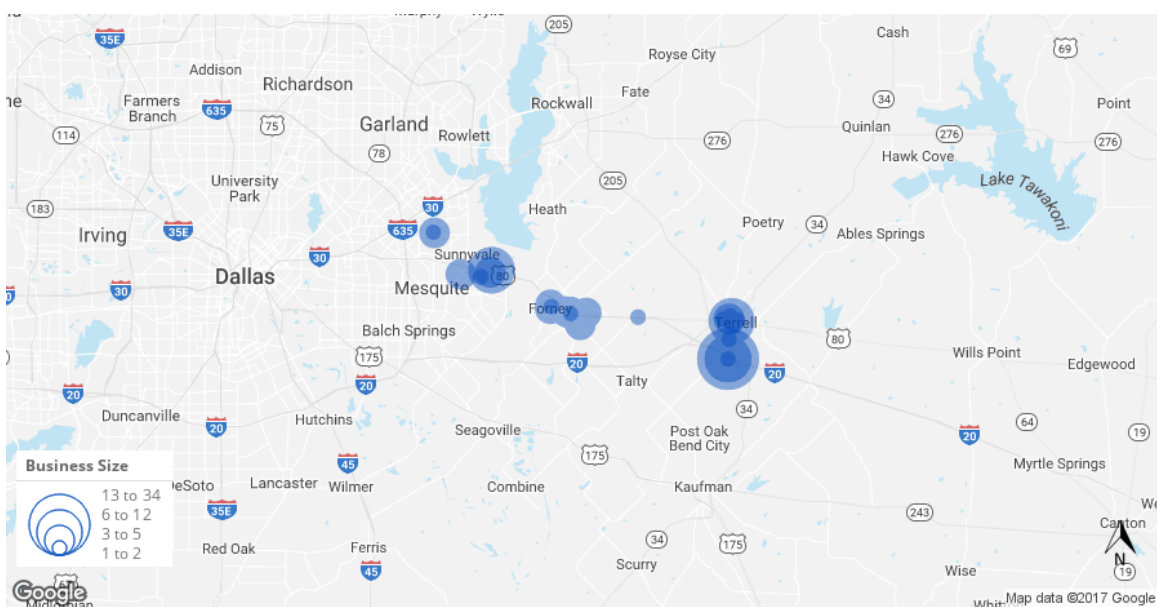
Miscellaneous and general retail stores sell a wide range of goods. In and near Forney, the key types of retailers captured in this general category include outlet stores, florists, novelty items, used clothes, pet supplies, and office supplies. There are 37 miscellaneous retail establishments within a 10-minute drive of Forney. These types of stores tend to be small, which is one reason why the count of stores in and near Forney is so high. However, the other reason is that this category includes department stores traditionally found in malls, such as Macy's or Sears. Sales for department stores are very high, and the high demand shown for the Forney area likely includes traditional department store spending. Department stores, however, are the one category that are in the sharpest decline of all retail types. The trend nationwide has been that traditional consumer spending that once went to department stores is now going to smaller specialty and niche stores, but also to e-commerce. However, not all traditional consumer spending is being redirected to retail. Spending on clothing has declined sharply, and spending on consumer experiences such as travel and fine dining has risen.

While strictly going by traditional demand estimates to arrive at a gap of 34 stores needed in the Forney area, these factors have not been examined based on new consumer spending estimates. The local market can most likely support many new niche stores, but the final number may be less than 34, while more service-oriented businesses, such as travel agencies, might better fill some of this gap.

Site Selection

Miscellaneous retail stores use an "immediate trade area" criteria for their site selection preferences. This criterion translates to a 10- to 15-minute drive time. This study incorporated a 10-minute drive time using a location in the heart of downtown Forney as the center point. Miscellaneous retail stores looking to establish a business location in Forney can see where competitors are already located (Figure 19) and the number of establishments needed to meet regional demand (Figure 20).

Figure 19. Miscellaneous Retail Stores Within a Ten-Minute Drive of Forney



Sources: Emsi 2017.1 dataset. InfoUSA. City of Forney.

Figure 20. Number of Establishments Not Adequately Represented Within a Ten-Minute Drive of Forney



Each blue or green storefront represents 10 retail establishments.
Sources: Emsi 2017.1 dataset. The U.S. Census of Retail Trade (2012). Emsi research.

Top Retailers in This Category

Goodwill, Salvation Army, PetSmart, Office Depot, Staples, and outlet stores.

Retailer Profile

Staples has 3,856 worldwide locations. Staples had just over \$18 billion in sales last year. The closest Staples store to Forney is located 13 miles away in Rockwall.

Business Listings

Business Name	Primary NAICS Code	Industry Name	City, State	Business Size
Old Navy Outlet	453998	All Other Miscellaneous Store Retailers	Terrell, TX	Small (0-49)
Gap Outlet	453998	All Other Miscellaneous Store Retailers	Terrell, TX	Small (0-49)
Reebok Factory Direct	453998	All Other Miscellaneous Store Retailers	Terrell, TX	Small (0-49)
East Fork Enterprises Inc	453310	Used Merchandise Stores	Sunnyvale, TX	Small (0-49)
Jotem Down Store	453310	Used Merchandise Stores	Mesquite, TX	Small (0-49)
Gymboree Outlet	453998	All Other Miscellaneous Store Retailers	Terrell, TX	Small (0-49)
Oshkosh B'gosh Outlet	453998	All Other Miscellaneous Store Retailers	Terrell, TX	Small (0-49)
L'eggs Hanes Bali Outlet	453998	All Other Miscellaneous Store Retailers	Terrell, TX	Small (0-49)
Levi's Outlet Store	453998	All Other Miscellaneous Store Retailers	Terrell, TX	Small (0-49)
Mts Publications	453210	Office Supplies and Stationery Stores	Forney, TX	Small (0-49)
Firmin's Office City	453210	Office Supplies and Stationery Stores	Terrell, TX	Small (0-49)
Southpark Coins	453998	All Other Miscellaneous Store Retailers	Forney, TX	Small (0-49)
Little Reds Antiques	453310	Used Merchandise Stores	Forney, TX	Small (0-49)
C D & E Enterprises	453910	Pet and Pet Supplies Stores	Forney, TX	Small (0-49)
Lady Janes Flowers & Gifts	453110	Florists	Sunnyvale, TX	Small (0-49)
Caspar & Gerard's Antiques	453310	Used Merchandise Stores	Forney, TX	Small (0-49)
Flowerfields Florist	453110	Florists	Terrell, TX	Small (0-49)
Wild Orchid Floral Design	453110	Florists	Sunnyvale, TX	Small (0-49)
Gallery Designs	453920	Art Dealers	Forney, TX	Small (0-49)
Leslie's Swimming Pool Supplies	453998	All Other Miscellaneous Store Retailers	Forney, TX	Small (0-49)
Chemical Coatings	453998	All Other Miscellaneous Store Retailers	Forney, TX	Small (0-49)
Accent Antiques	453920	Art Dealers	Sunnyvale, TX	Small (0-49)
Bow Wood Florist & Gifts	453110	Florists	Forney, TX	Small (0-49)
Philbeck's Antiques	453310	Used Merchandise Stores	Forney, TX	Small (0-49)
Front Porch	453220	Gift, Novelty, and Souvenir Stores	Terrell, TX	Small (0-49)
Audio Party Rentals	453220	Gift, Novelty, and Souvenir Stores	Forney, TX	Small (0-49)
Community Value & Thrift	453310	Used Merchandise Stores	Forney, TX	Small (0-49)
Shazik's Fashion Accessories & Gifts	453220	Gift, Novelty, and Souvenir Stores	Terrell, TX	Small (0-49)
Deridder Antiques Corp	453310	Used Merchandise Stores	Forney, TX	Small (0-49)
Memories Timeless Treasures	453310	Used Merchandise Stores	Sunnyvale, TX	Small (0-49)
Flower Basket	453110	Florists	Forney, TX	Small (0-49)
Hallman Memorials	453998	All Other Miscellaneous Store Retailers	Terrell, TX	Small (0-49)
Terrell's Own Little Antique	453310	Used Merchandise Stores	Terrell, TX	Small (0-49)
Fischer's Antiques	453310	Used Merchandise Stores	Sunnyvale, TX	Small (0-49)
Creative Picture Framing	453998	All Other Miscellaneous Store Retailers	Terrell, TX	Small (0-49)
Fantasy Foliage	453110	Florists	Terrell, TX	Small (0-49)
Miller's Junque & Treasures	453310	Used Merchandise Stores	Terrell, TX	Small (0-49)

Sources: Emsi 2017.1 dataset. InfoUSA. City of Forney.

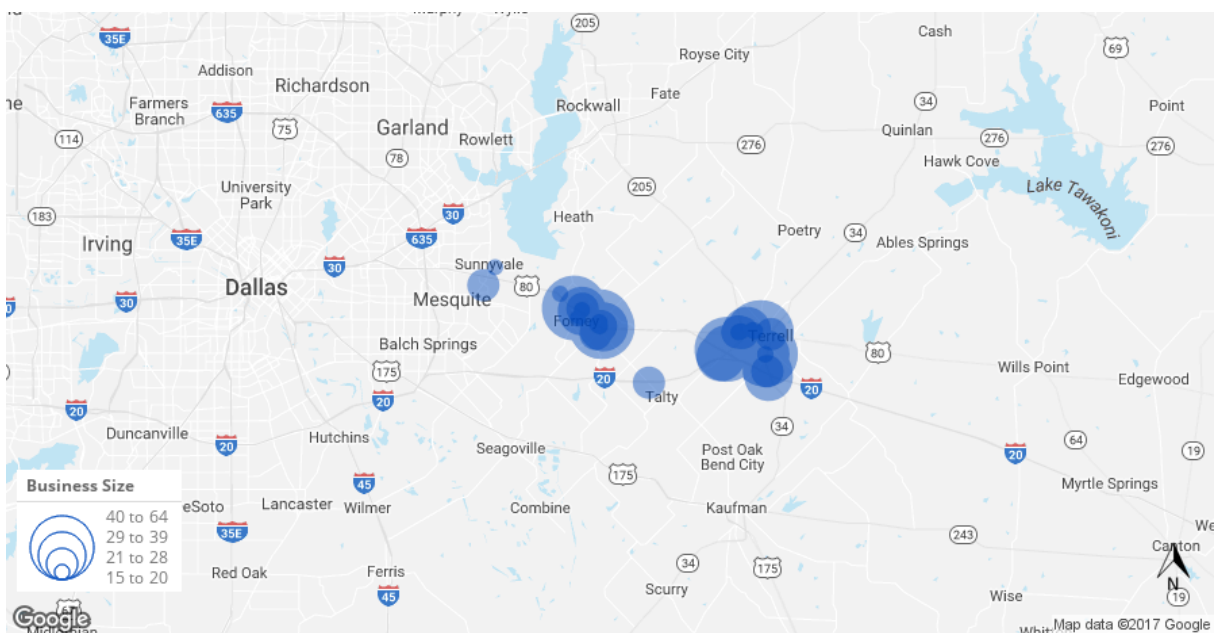
Restaurants

Restaurants provide customers a variety of dining options; some of the categories are ethnic cuisine, American, fast food, fast casual, casual dining, fine dining, barbecue, buffets, cafes, bakeries, and cafeterias. There are 126 restaurants within a 10-minute drive of Forney.

Site Selection

Restaurants use a five-minute drive time criteria for their site selection preferences. This study incorporated the five-minute drive time using a location in the heart of downtown Forney as the center point. Restaurants looking to establish a business location in Forney can see where competitors are already located (Figure 21) and the number of establishments needed to meet regional demand (Figure 22).

Figure 21. Restaurants Within a Five-Minute Drive of Forney



Sources: Emsi 2017.1 dataset. InfoUSA. City of Forney.

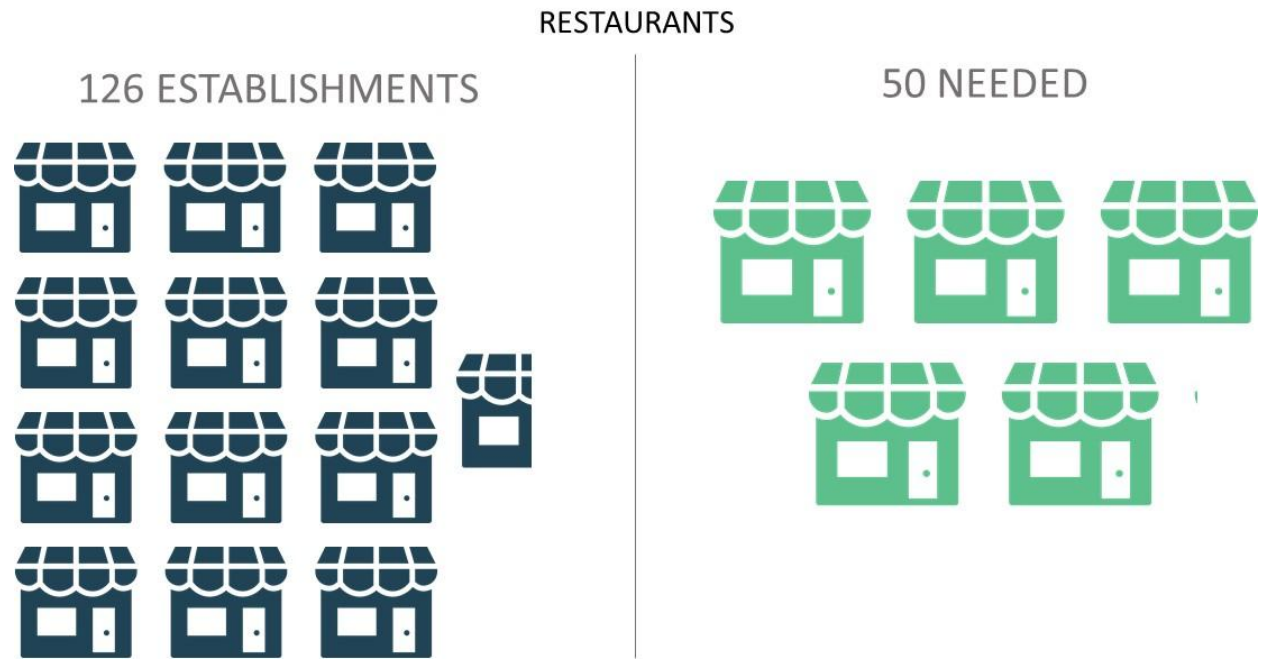
Top Retailers in This Category

McDonalds, Starbucks, Chick-Fil-A, Subway, Olive Garden, Red Lobster, Outback Steakhouse, Burger King, Taco Bell, Red Robin, Panda Express, Buffalo Wild Wings, and many more.

Retailer Profile

Starbucks has 24,464 locations around the world. It had \$21.3 billion in sales last year. The company prefers a location of 2,000 square feet and that the location be either freestanding in a power or community/neighborhood area or in a strip center or mall. The closest Starbucks is in Forney and is 2.6 miles from downtown.

Figure 22. Number of Establishments Not Adequately Represented Within a Five-Minute Drive of Forney



Each blue or green storefront represents 10 retail establishments.
 Sources: Emsi 2017.1 dataset. The U.S. Census of Retail Trade (2012). Emsi research.

Business Listings

Business Name	Primary NAICS Code	Industry Name	City, State	Business Size
Applebee's	722511	Full-Service Restaurants	Forney, TX	Medium (50-249)
Applebee's	722511	Full-Service Restaurants	Terrell, TX	Medium (50-249)
Sonic Drive-in	722511	Full-Service Restaurants	Forney, TX	Medium (50-249)
Chili's Grill & Bar	722511	Full-Service Restaurants	Forney, TX	Medium (50-249)
Taco Bell	722511	Full-Service Restaurants	Terrell, TX	Small (0-49)
Chick-fil-a	722511	Full-Service Restaurants	Forney, TX	Small (0-49)
Sonic Drive-in	722511	Full-Service Restaurants	Terrell, TX	Small (0-49)
Denny's	722511	Full-Service Restaurants	Terrell, TX	Small (0-49)
IHOP Restaurant	722511	Full-Service Restaurants	Terrell, TX	Small (0-49)
Whataburger	722511	Full-Service Restaurants	Forney, TX	Small (0-49)
Wendy's	722511	Full-Service Restaurants	Terrell, TX	Small (0-49)
McDonald's	722511	Full-Service Restaurants	Forney, TX	Small (0-49)
Starbucks	722515	Snack and Nonalcoholic Beverages	Terrell, TX	Small (0-49)
Whataburger	722511	Full-Service Restaurants	Terrell, TX	Small (0-49)
Pizza Hut	722511	Full-Service Restaurants	Forney, TX	Small (0-49)
Sonic Drive-in	722511	Full-Service Restaurants	Terrell, TX	Small (0-49)
Whataburger	722511	Full-Service Restaurants	Terrell, TX	Small (0-49)
Subway	722511	Full-Service Restaurants	Terrell, TX	Small (0-49)
Whataburger	722511	Full-Service Restaurants	Terrell, TX	Small (0-49)

Forney Taco Casa	722511	Full-Service Restaurants	Forney, TX	Small (0-49)
Dairy Queen	722515	Snack and Nonalcoholic Beverages	Forney, TX	Small (0-49)
Jack In The Box	722511	Full-Service Restaurants	Forney, TX	Small (0-49)
Wendy's	722511	Full-Service Restaurants	Forney, TX	Small (0-49)
Cole Mountain	722511	Full-Service Restaurants	Terrell, TX	Small (0-49)
Tinos Mexican Food Restaurant	722511	Full-Service Restaurants	Sunnyvale	Small (0-49)
Sonic Drive-in	722511	Full-Service Restaurants	Terrell, TX	Small (0-49)
Burger King	722511	Full-Service Restaurants	Terrell, TX	Small (0-49)
Waffle House	722511	Full-Service Restaurants	Terrell, TX	Small (0-49)
Waffle House	722511	Full-Service Restaurants	Terrell, TX	Small (0-49)
Chicken Express	722511	Full-Service Restaurants	Forney, TX	Small (0-49)
Cicis	722511	Full-Service Restaurants	Terrell, TX	Small (0-49)
Pizza Hut	722511	Full-Service Restaurants	Terrell, TX	Small (0-49)
Cicis	722511	Full-Service Restaurants	Forney, TX	Small (0-49)
Oscar Delta Texas Kitchen	722511	Full-Service Restaurants	Forney, TX	Small (0-49)
Taco Bell	722511	Full-Service Restaurants	Forney, TX	Small (0-49)
Subway	722511	Full-Service Restaurants	Forney, TX	Small (0-49)
Papa John's Pizza	722511	Full-Service Restaurants	Forney, TX	Small (0-49)
Braum's Ice Cream & Dairy	722515	Snack and Nonalcoholic Beverages	Terrell, TX	Small (0-49)
Arby's	722511	Full-Service Restaurants	Terrell, TX	Small (0-49)
Cicis	722511	Full-Service Restaurants	Sunnyvale	Small (0-49)
Panda Express	722511	Full-Service Restaurants	Terrell, TX	Small (0-49)
Carmona's Tex-mex	722511	Full-Service Restaurants	Terrell, TX	Small (0-49)
Jack In The Box	722511	Full-Service Restaurants	Terrell, TX	Small (0-49)
KFC	722511	Full-Service Restaurants	Terrell, TX	Small (0-49)
Starbucks	722515	Snack and Nonalcoholic Beverages	Forney, TX	Small (0-49)
Huddle House	722511	Full-Service Restaurants	Forney, TX	Small (0-49)
Schlitzsky's	722511	Full-Service Restaurants	Forney, TX	Small (0-49)
Domino's	722511	Full-Service Restaurants	Forney, TX	Small (0-49)
Pop's Honey Fried Chicken	722511	Full-Service Restaurants	Terrell, TX	Small (0-49)
Long John Silver's	722511	Full-Service Restaurants	Terrell, TX	Small (0-49)
Madres Cocina	722511	Full-Service Restaurants	Forney, TX	Small (0-49)
Chicken Express	722511	Full-Service Restaurants	Terrell, TX	Small (0-49)
El Nogalito Restaurant	722511	Full-Service Restaurants	Terrell, TX	Small (0-49)
Schlitzsky's	722511	Full-Service Restaurants	Terrell, TX	Small (0-49)
A&W Restaurants	722511	Full-Service Restaurants	Terrell, TX	Small (0-49)
Domino's	722511	Full-Service Restaurants	Terrell, TX	Small (0-49)
Church's Chicken	722511	Full-Service Restaurants	Terrell, TX	Small (0-49)
Taco Mayo	722511	Full-Service Restaurants	Terrell, TX	Small (0-49)
Dickey's Barbecue Pit	722511	Full-Service Restaurants	Forney, TX	Small (0-49)
Rio Lerma Mexican Restaurant	722511	Full-Service Restaurants	Forney, TX	Small (0-49)
Los Hermanos	722511	Full-Service Restaurants	Terrell, TX	Small (0-49)
Simply Great Catering	722320	Caterers	Forney, TX	Small (0-49)
Mr. Jim's Pizza	722511	Full-Service Restaurants	Forney, TX	Small (0-49)

Swingin Doors	722410	Drinking Places (Alcoholic Beverages)	Terrell, TX	Small (0-49)
Subway	722511	Full-Service Restaurants	Forney, TX	Small (0-49)
Subway	722511	Full-Service Restaurants	Sunnyvale, TX	Small (0-49)
Terrell Cafe	722511	Full-Service Restaurants	Terrell, TX	Small (0-49)
Terrell Steak & Grill	722511	Full-Service Restaurants	Terrell, TX	Small (0-49)
Panda Express	722511	Full-Service Restaurants	Forney, TX	Small (0-49)
Joe & David Tacos	722511	Full-Service Restaurants	Forney, TX	Small (0-49)
Soulman's Bar-b-que Inc	722511	Full-Service Restaurants	Forney, TX	Small (0-49)
Tokyo Harbor	722511	Full-Service Restaurants	Forney, TX	Small (0-49)
Crumbzz	722511	Full-Service Restaurants	Forney, TX	Small (0-49)
Cristina's	722511	Full-Service Restaurants	Forney, TX	Small (0-49)
Doe Belly's	722511	Full-Service Restaurants	Forney, TX	Small (0-49)
Napoli's Italian Restaurant	722511	Full-Service Restaurants	Terrell, TX	Small (0-49)
Los Hermanos Mexican Rstrnt	722511	Full-Service Restaurants	Forney, TX	Small (0-49)
Alfredo's Steakhouse	722511	Full-Service Restaurants	Forney, TX	Small (0-49)
Mama's Daughters' Diner	722511	Full-Service Restaurants	Forney, TX	Small (0-49)
Julio's Chicken & Fish	722511	Full-Service Restaurants	Terrell, TX	Small (0-49)
Jungle Burger	722511	Full-Service Restaurants	Terrell, TX	Small (0-49)
Cowboy Taqueria Mexican Food	722511	Full-Service Restaurants	Terrell, TX	Small (0-49)
Underground Bar & Grill Inc	722511	Full-Service Restaurants	Terrell, TX	Small (0-49)
Cowboy Chicken	722511	Full-Service Restaurants	Forney, TX	Small (0-49)
Javier's Tex Mex Bar	722511	Full-Service Restaurants	Terrell, TX	Small (0-49)
Wingstop	722511	Full-Service Restaurants	Forney, TX	Small (0-49)
Abuelito's Street Tacos	722511	Full-Service Restaurants	Forney, TX	Small (0-49)
Hong Kong Express	722511	Full-Service Restaurants	Forney, TX	Small (0-49)
Taqueria Dos Aces	722511	Full-Service Restaurants	Terrell, TX	Small (0-49)
Rocko's Pizza	722511	Full-Service Restaurants	Terrell, TX	Small (0-49)
Subway	722511	Full-Service Restaurants	Forney, TX	Small (0-49)
Subway	722511	Full-Service Restaurants	Terrell, TX	Small (0-49)
Dippin Dave's	722515	Snack and Nonalcoholic Beverage Bars	Forney, TX	Small (0-49)
4T's BBQ	722511	Full-Service Restaurants	Forney, TX	Small (0-49)
Homero Yellow Rose	722511	Full-Service Restaurants	Terrell, TX	Small (0-49)
Subway	722511	Full-Service Restaurants	Terrell, TX	Small (0-49)
Bull's Pen Cafe	722511	Full-Service Restaurants	Sunnyvale, TX	Small (0-49)
Good & Fast Chicken Restaurant	722511	Full-Service Restaurants	Mesquite, TX	Small (0-49)
Boomerjack Wings	722511	Full-Service Restaurants	Terrell, TX	Small (0-49)
Side Street Bar Inc	722410	Drinking Places (Alcoholic Beverages)	Terrell, TX	Small (0-49)
Pizza Inn	722511	Full-Service Restaurants	Terrell, TX	Small (0-49)
Hole Thing	722515	Snack and Nonalcoholic Beverages	Forney, TX	Small (0-49)
Catfish Cove Family Rstrnt	722511	Full-Service Restaurants	Sunnyvale, TX	Small (0-49)
Blessings Sandwich Shop	722513	Limited-Service Restaurants	Terrell, TX	Small (0-49)

Java Junkies Coffee Bar-bakery	722515	Snack and Nonalcoholic Beverages	Terrell, TX	Small (0-49)
Time Out Cafe	722410	Drinking Places (Alcoholic Beverages)	Forney, TX	Small (0-49)
Taco Two Jalapeno	722511	Full-Service Restaurants	Terrell, TX	Small (0-49)
Moon Jumpers Party & Wedding	722310	Food Service Contractors	Forney, TX	Small (0-49)
Mexico Lindo	722513	Limited-Service Restaurants	Terrell, TX	Small (0-49)
ShIPLEY Do-nuts	722515	Snack and Nonalcoholic Beverages	Terrell, TX	Small (0-49)
Whataburger	722511	Full-Service Restaurants	Forney, TX	Small (0-49)
Silver Saloon	722410	Drinking Places (Alcoholic Beverages)	Terrell, TX	Small (0-49)
Soulman's Bar B Que	722511	Full-Service Restaurants	Terrell, TX	Small (0-49)
Krispy Krunchy Chicken	722511	Full-Service Restaurants	Forney, TX	Small (0-49)
Queen Donuts	722515	Snack and Nonalcoholic Beverage Bars	Terrell, TX	Small (0-49)
Sunny Donut	722515	Snack and Nonalcoholic Beverage Bars	Forney, TX	Small (0-49)
Sonny Doughnuts	722515	Snack and Nonalcoholic Beverage Bars	Mesquite, TX	Small (0-49)
Donut Palace	722515	Snack and Nonalcoholic Beverage Bars	Forney, TX	Small (0-49)
China Town Restaurant	722511	Full-Service Restaurants	Terrell, TX	Small (0-49)
Costa Nostra	722511	Full-Service Restaurants	Sunnyvale, TX	Small (0-49)
Pizza Grand	722511	Full-Service Restaurants	Forney, TX	Small (0-49)
Bubble Bubble	722511	Full-Service Restaurants	Terrell, TX	Small (0-49)
Panda Buffet	722511	Full-Service Restaurants	Terrell, TX	Small (0-49)
Donut D'Lite	722515	Snack and Nonalcoholic Beverage Bars	Forney, TX	Small (0-49)
Forney Donuts	722515	Snack and Nonalcoholic Beverage Bars	Forney, TX	Small (0-49)
Waffle House	722511	Full-Service Restaurants	Forney, TX	Small (0-49)

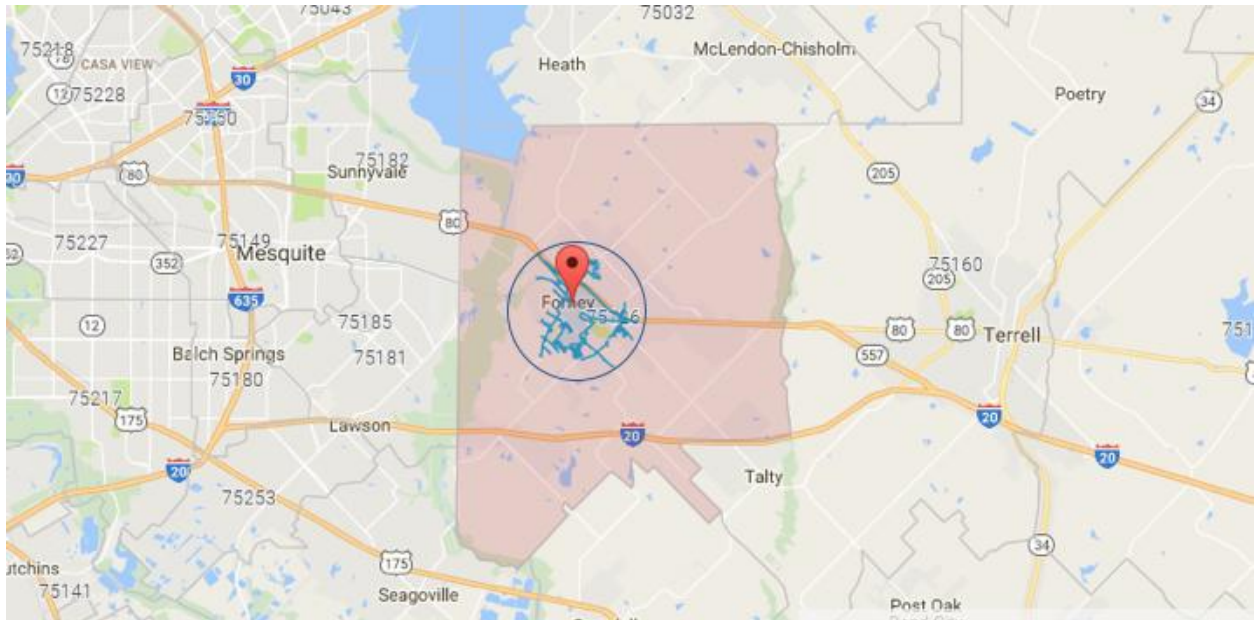
Sources: Emsi 2017.1 dataset. InfoUSA. City of Forney.

The blues circle represents the supply criteria used and the shaded region represents demand.

3-minute drive time.



5-minute drive time.



10-minute drive time.

