Demographics

Steadily growing, Rowlett is central to an interconnected regional Trade Area which includes the Cities of Garland, Rockwall, Sachse, Murphy and Wylie. With the exception of Garland, all of these are rapidly-growing edge communities.

Rowlett Trade Area

	City of Rowlett	Rowlett Trade Area	DFW Metro
2000 Population	44,503	306,229	5,161,544
2010 Population	56,199	375,813	6,493,270
2010 Households	17,588	124,866	2,320,136
Annual Household Growth Rate (Projected to 2040)	2.5%	1.7%	1.3%
Average Household Size (2010)	3.0	2.8	2.7
Pct. Non-family Households (2010)	13%	27%	33%
Pct. Renters (2010)	9%	30%	42%
Pct. Age 65+	7%	9%	9%
Pct. Age 0-14	27%	25%	24%
Median Age	34.1	34.5	33.7
Pct. w College Degree	35%	33%	29%
Pct. Blue Collar (Age 16+)	17%	19%	22%
Median Hhld. Income	$82,415	$64,157	$58,202
Per Capita Income	$29,896	$26,138	$27,980
Pct. w Income <$25K	6%	13%	18%
Pct. w Income $100K+	35%	24%	24%
Pct. Hispanic	16%	28%	27%
Pct. Black/Afr.-Amer.	13%	16%	16%
Pct. Asian	7%	9%	7%
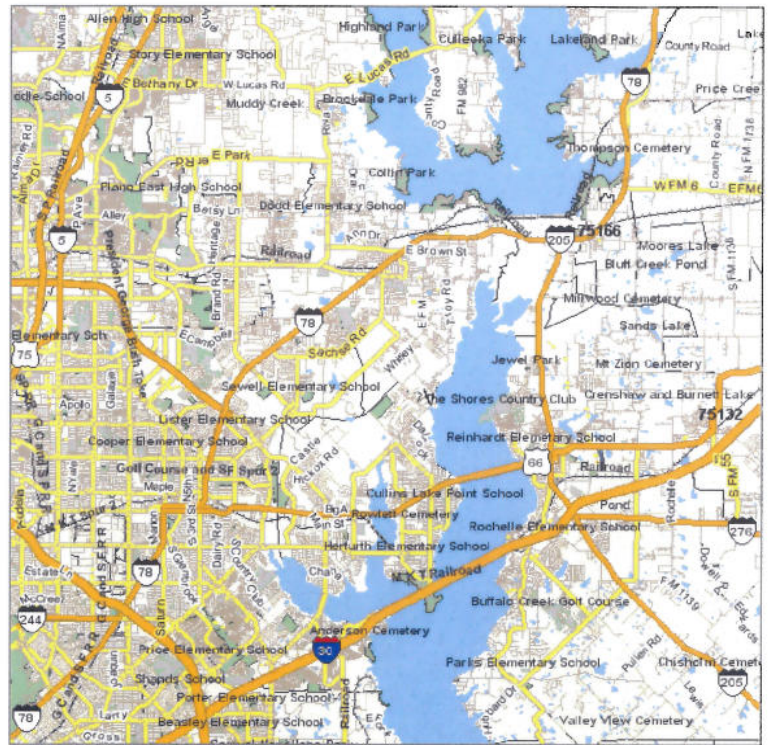
- One of the Metroplex's fastest growing outer-ring communities, Rowlett offers a demographic profile supportive of a range of new development product types.

- Rowlett's median household income is considerably higher than either its regional Trade Area or the DFW Metroplex.

- A higher than average percentage of family-oriented households and high homeownership figures explain a low percentage of rental units.

- Rowlett's demographics reflect a relatively affluent , highly-educated population.

- Rowlett is not as ethnically diverse as either its regional Trade Area or the DFW Metroplex.

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Psychographics

Psychographics describe characteristics of people and neighborhoods which, instead of being purely demographic, speaks to attitudes, interests, opinions & lifestyles.

PRIZM - NE (Claritas, Inc.) is a leading system for grouping neighborhoods into one of 65 distinct market segments – used by retailers, home-builders and site-selection specialists to tailor product offerings and align development with target markets.

Top 5 Rowlett Trade Area PRIZM Segments (by Households)

Segment	Description	Trade Area Households
Blue-Chip Blues	A comfortable lifestyle for ethnically-diverse, young, sprawling families with well-paying blue-collar jobs. Aging neighborhoods feature compact, modestly priced homes surrounded by retail catering to child-filled households	8,832 (x 5.2)
American Dreams	Living example of ethnically diverse nation: ½ are Hispanic, Asian, or African-American. Multilingual neighborhoods--one in ten speaks a language other than English--middle-aged immigrants &children live in upper-middle-class comfort.	7,821 (x 2.9)
Multi-Culti Mosaic	Immigrant gateway community... urban home for mixed populace of younger Hispanic, Asian, and African-American singles & families. Nearly ¼ foreign born – a mecca for first-generation Americans striving to improve their lower-middle class status.	7,382 (x 3.5)
Home Sweet Home	Widely scattered across the nation's suburbs, the residents of Home Sweet Home tend to be upper-middle-class married couples living in mid-sized homes with few children. The adults in the segment, mostly between the ages of 25 and 54, have gone to college and hold professional and white-collar jobs. With their upscale incomes and small families, these folks have fashioned comfortable lifestyles, filling their homes with toys, TV sets and pets.	6,615 (x 2.9)
Beltway Boomers	The members of the postwar Baby Boom are all grown up. Today, these Americans are in their forties and fifties, and one segment of this huge cohort--college-educated, upper-middle-class and home-owning--is found in Beltway Boomers. Like many of their peers who married late, these Boomers are still raising children in comfortable suburban subdivisions, and they're pursuing kid-centered lifestyles.	6,262 (x 5.2)

The Rowlett Trade Area maintains a solid base of middle and upper middle class demographics, which encompasses a broad diversity of psychographic / lifestyle groups .

With 29% of total Trade Area households represented by the segments profiled in the table at the left, the Rowlett Trade Area can be considered to be relatively stable – with both residents preferring to move within the community as lifestyle forces dictate, and those that would likely move elsewhere.

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Residential Market

Though surrounded by several other suburbs, Rowlett is poised to compete for residential expansion, due to its proximity to future transit and waterfront amenities, and a healthy quality of life.

Demand for new residential units over 10 years is based on growth forecasts for both the City and regional Trade Area – income -qualified into likely rent and price brackets. These forecasts show demand for an additional 15,623 ownership units and 6,551 rental units. The ownership units are further segmented into demand for 10,026 single family units and 5,398 townhome/condo units.

Residential Demand Analysis
Rowlett Trade Area
10-yr Demand Estimates

Households	2010	124,866		
	2015	135,180	Annual Growth Rate	1.6%
	2020	146,346		
Household Growth (2010-20)		21,480	Adjust for 2nd homes,	
			demolition, vacancy	3.0%
Adjusted Unit Requirement		22,125	% Rental	30%

					Trade Area Demand from New Households (10-yr)			
Household Income Range (2010 dollars)	Approximate Rent Range	Supportable Home Price Range	Current Households in Income Bracket	New Households by Income Bracket	Total Units	Estimated % Rental	Total Rental Units	Total Ownership Units
up to $15K	up to $375	up to $75K	6%	9%	1,991	90%	1,792	199
$15-25K	$375 - $625	$75 to $100K	7%	8%	1,770	70%	1,239	531
$25-35K	$625 - $875	$100 to $150K	9%	10%	2,212	50%	1,106	1,106
$35-50K	$875 - $1,000	$150 to $200K	15%	13%	2,876	35%	1,007	1,870
$50-75K	$1,000+	$200 to $250K	22%	18%	3,982	20%	796	3,186
$75-100K	$1,000+	$250 to $350K	16%	13%	2,876	10%	288	2,589
$100-150K	$1,000+	$350 to $500K	16%	16%	3,590	5%	180	3,411
$150K and up	$1,000+	$500K and up	8%	13%	2,876	5%	144	2,732
Totals			99%	100%	22,125	30%	6,551	15,623

Source: NCTCOG, Claritas, Inc.; U.S. Census, and Ricker+Cunningham.

Ownership Demand

Annual Household Income Range	Approximate Home Price Range	Trade Area For-Sale Demand (Incomes $15K+)	Estimated % Single Family Detached	Single Family Detached Demand	Estimated % Townhome/ Condo	Townhome/ Condo Demand
$15-25K	$75 to $100K	531	65%	345	35%	186
$25-35K	$100 to $150K	1,106	65%	719	35%	387
$35-50K	$150 to $200K	1,870	65%	1,215	35%	654
$50-75K	$200 to $250K	3,186	65%	2,071	35%	1,115
$75-100K	$250 to $350K	2,589	65%	1,683	35%	906
$100-150K	$350 to $500K	3,411	65%	2,217	35%	1,194
$150K and up	$500K and up	2,732	65%	1,776	35%	956
Totals		**15,424**	65%	**10,026**	54%	**5,398**

Rental Demand

Annual Household Income Range	Approximate Rent Range	Trade Area Rental Demand (Incomes $15K+)
$15-25K	$375 - $625	1,239
$25-35K	$625 - $875	1,106
$35-50K	$875 - $1,000	1,007
$50-75K	$1,000+	796
$75-100K	$1,000+	288
$100-150K	$1,000+	180
$150K and up	$1,000+	144
Totals		**4,759**

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Retail Market

Rowlett's days as a bedroom community could be coming to an end, with retail of every size and type now being found throughout the City. Obvious gaps in the existing inventory include neighborhood shops, a range of dining establishments and various regional entertainment draws. Coordinated public – private efforts will be critical in catalyzing retail development that stands out from growing regional competition in surrounding communities.

Forecasts for new household spending in the Trade Area over 10 years show demand for an additional 2.5 million square feet of retail space.
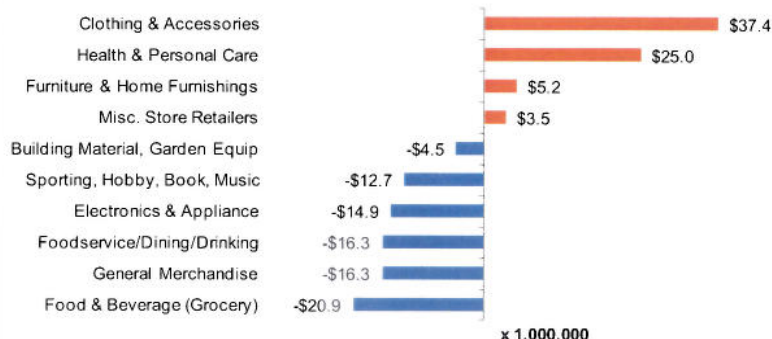
Retail Demand Analysis

Rowlett Trade Area

2010-2020 Demand Estimates (Selected Categories)

Retail Category	Estimated 2010 Retail Sales (Supply)	Estimated 2010 Household Retail Demand	Projected Trade Area Household Growth Rate	10-Year Projected Trade Area Demand	10-Year Growth in Demand	Estimated Retail Sales/s.f.	10-yr New Retail Demand (s.f.)
Furniture and Home Furnishings	$39,645,057	$109,533,845	1.6%	$128,376,465	$18,842,620	$175	107,672
Electronics and Appliances	$43,992,588	$120,667,625	1.6%	$141,425,540	$20,757,915	$200	103,790
Building Materials, Garden Equipment	$297,427,544	$506,200,546	1.6%	$593,279,974	$87,079,428	$275	316,652
Food and Beverage	$436,665,998	$680,939,779	1.6%	$798,078,819	$117,139,040	$375	312,371
Health and Personal Care	$172,390,375	$298,420,235	1.6%	$349,756,140	$51,335,905	$325	157,957
Clothing and Accessories	$142,648,736	$260,082,037	1.6%	$304,822,793	$44,740,756	$200	223,704
Sporting Goods, Hobby, Book, Music	$73,017,561	$100,925,595	1.6%	$118,287,376	$17,361,781	$225	77,163
General Merchandise	$433,283,640	$712,422,568	1.6%	$834,977,452	$122,554,884	$275	445,654
Miscellaneous Store Retailers	$50,870,387	$130,158,637	1.6%	$152,549,248	$22,390,611	$200	111,953
Foodservice and Drinking Places	$393,122,270	$557,913,854	1.6%	$653,889,292	$95,975,438	$350	274,216
Excluded Categories (cinema, prof./med. office, banks, etc.) @ 10% of total	$208,306,416	$347,726,472	1.6%	$407,544,310	$59,817,838	$175	341,816
Totals	$2,291,370,572	$3,824,991,193		$4,482,987,408	$657,996,215		2,472,948

Sources: NCTCOG, Claritas Inc., Urban Land Institute, and Ricker+Cunningham.

Trade Area Surplus/Leakage

Category	Value
Clothing & Accessories	$37.4
Health & Personal Care	$25.0
Furniture & Home Furnishings	$5.2
Misc. Store Retailers	$3.5
Building Material, Garden Equip	-$4.5
Sporting, Hobby, Book, Music	-$12.7
Electronics & Appliance	-$14.9
Foodservice/Dining/Drinking	-$16.3
General Merchandise	-$16.3
Food & Beverage (Grocery)	-$20.9

x 1,000,000

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Employment Market

City of Rowlett
Economic Profile

Rowlett's employment-based development remains comparatively modest in size and building class, particularly when compared to neighboring Garland. An expanding critical mass of housing across various price points, expanding regional access through transit and highway systems, and its growing connectedness suggest Rowlett could be ready to emerge as a more prominent employment address for the northeast Metroplex. Small businesses, including the administrative outgrowth of nearby industrial concentrations, may find desirable office opportunities in future infill developments, while larger tracts may hold appeal for business park development.

Forecasts for new employment space in the Trade Area over 10 years show demand for an additional 9.6 million square feet of office space and 14.4 million square feet of industrial space.

Office Demand Analysis
Rowlett Trade Area

Industry Category	Estimated 2010 Employees	Estimated Growth Rate 2010-2020	Estimated 2020 Employees	Estimated % in Office Space	Estimated 2020 Office Employees	Sq Ft per Office Employee	Estimated 2020 Office Demand
Natural Resources, Mining and Construction	7,960	1.6%	9,329	40%	3,732	180	671,714
Manufacturing	12,277	1.6%	14,389	5%	719	180	129,504
Wholesale Trade	7,555	1.6%	8,855	5%	443	180	79,695
Retail Trade	14,166	1.6%	16,603	5%	830	180	149,428
Transportation, Warehousing and Utilities	6,476	1.6%	7,590	10%	759	180	136,620
Information	3,913	1.6%	4,586	80%	3,668	180	660,329
Financial Activities	10,658	1.6%	12,492	90%	11,243	180	2,023,681
Professional and Business Services	19,563	1.6%	22,928	80%	18,342	180	3,301,645
Educational and Health Services	16,055	1.6%	18,817	20%	3,763	180	677,406
Leisure and Hospitality	13,222	1.6%	15,496	10%	1,550	180	278,932
Other Services	4,722	1.6%	5,534	30%	1,660	180	298,856
Government	18,349	1.6%	21,505	30%	6,451	180	1,161,268
Totals	**134,916**	**1.6%**	**158,125**	**34%**	**53,162**	**180**	**9,569,078**

Industrial Demand Analysis
Rowlett Trade Area

Industry Category	Estimated 2010 Employees	Estimated Growth Rate 2010-2020	Estimated 2020 Employees	Estimated % in Industrial Space	Estimated 2020 Industrial Employees	Sq Ft per Industrial Employee	Estimated 2020 Industrial Demand
Natural Resources, Mining and Construction	7,960	1.6%	9,329	20%	1,866	400	746,349
Manufacturing	12,277	1.6%	14,389	80%	11,511	400	4,604,593
Wholesale Trade	7,555	1.6%	8,855	90%	7,969	400	3,187,795
Retail Trade	14,166	1.6%	16,603	10%	1,660	400	664,124
Transportation, Warehousing and Utilities	6,476	1.6%	7,590	20%	1,518	400	607,199
Information	3,913	1.6%	4,586	20%	917	400	366,849
Financial Activities	10,658	1.6%	12,492	5%	625	400	249,837
Professional and Business Services	19,563	1.6%	22,928	10%	2,293	400	917,124
Educational and Health Services	16,055	1.6%	18,817	10%	1,882	400	752,674
Leisure and Hospitality	13,222	1.6%	15,496	5%	775	400	309,925
Other Services	4,722	1.6%	5,534	10%	553	400	221,375
Government	18,349	1.6%	21,505	20%	4,301	400	1,720,397
Totals	**134,916**	**1.6%**	**158,125**	**23%**	**35,871**	**400**	**14,348,241**

Source: NCTCOG, U.S. Census, and Ricker+Cunningham.

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