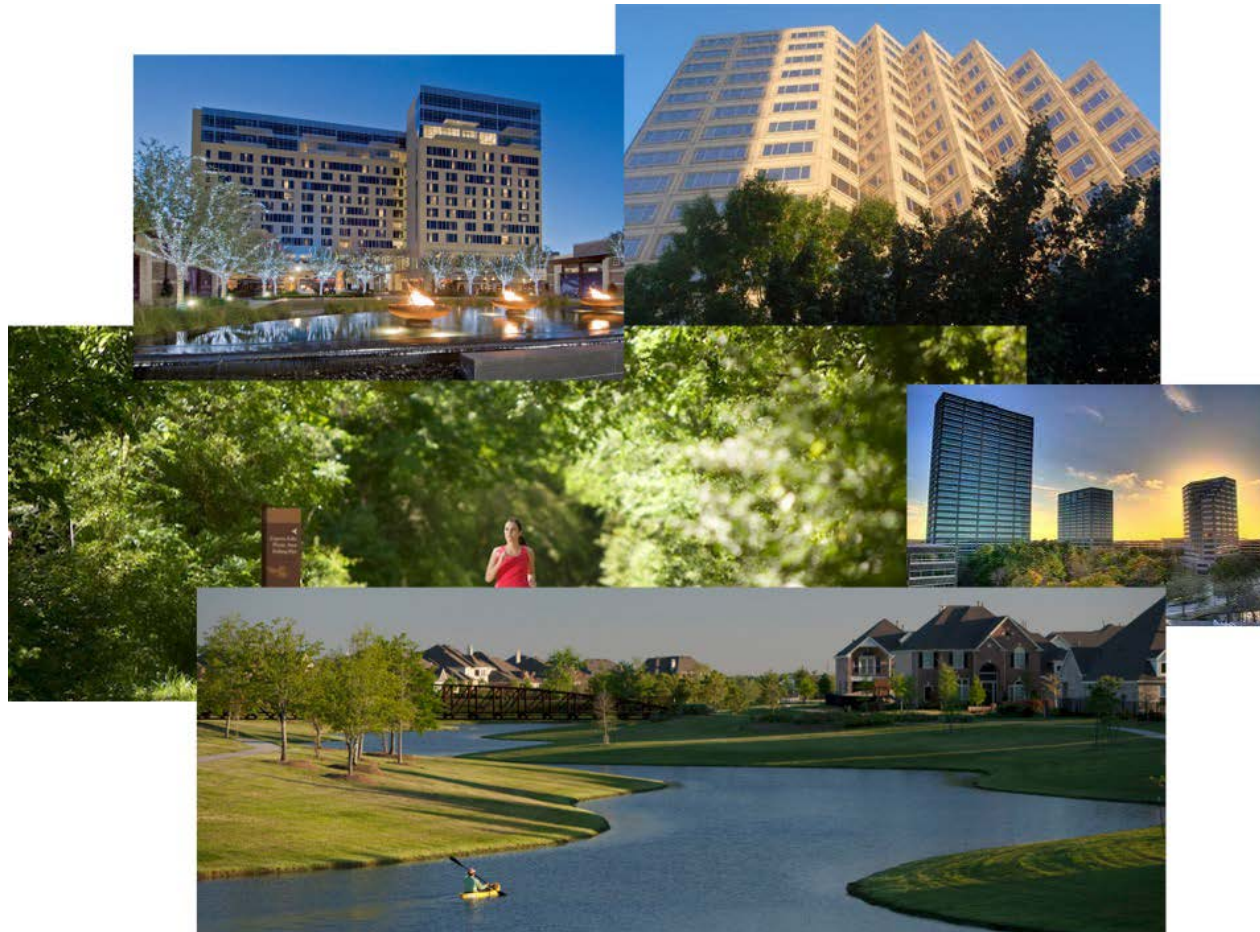

Greater West Houston Demographic and Economic Profile



West Houston Association
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Spring, 2011





Greater West Houston:

Growth here continues, a bright spot on the nation's economy.

A History of Growth—Greater West Houston is a dynamic, high growth 1,000 square mile area in the western portions of the Houston metropolitan area. Population in Greater West Houston in 1970 was under 200,000 and by 1990 reached over 700,000. Jobs jumped from approximately 17,000 in 1970 to 242,000 in 1990. As the Houston region grew, suburban Greater West Houston benefited with new master planned residential developments. Major employment centers such as The Energy Corridor and Westchase grew as employers began their westward suburban migration.

Between 1990 and 2010 both of these trends accelerated, fueled by the availability of educational excellence, affordable housing and shorter commutes.

Growth Continues—This *Greater West Houston Demographic and Economic Profile* quantifies this growth and presents updated forecasts to 2050 when Greater West Houston's population is expected to reach over 2.8 million with employment of 930,000. The traditional suburban Greater West Houston is now home to

high density employment and high quality mixed use development.

Driven by Infrastructure & Public Policies—This growth did not just happen. It is supported by an excellent educational system, major improvements to the transportation network and public policies that allowed both high quality master-planned communities and affordable housing to flourish.

The synergy between Greater West Houston growth and infrastructure will continue. There will be a continuing need for planning and financing of new and rebuilt transportation, education, water supplies and drainage infrastructure; as well as new parks and open spaces that contribute to the overall quality of place in Greater West Houston.

This document maps the course ahead.

Roger Hord, President & CEO, West Houston Association

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1. Introduction

Greater West Houston (GWH) is a 1,000 square mile area in the western portions of the Houston Sugar Land Baytown Metropolitan area.

This area is home to:

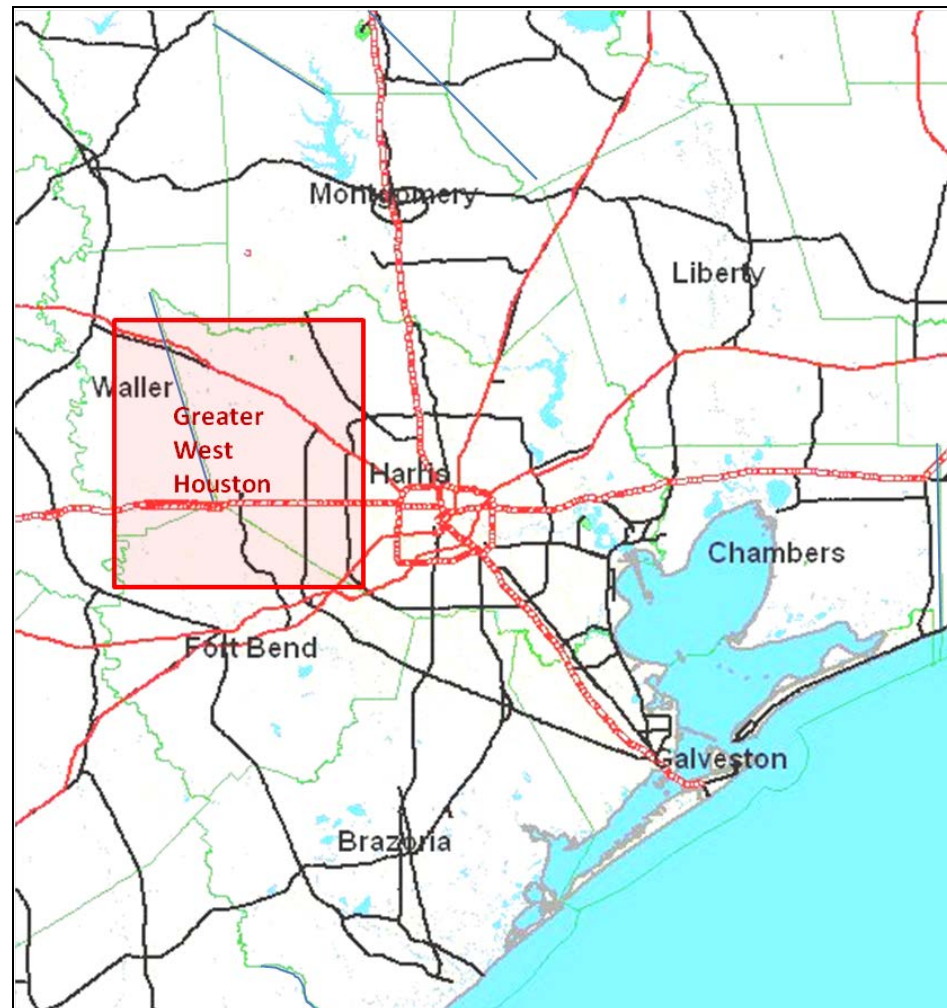
- 1.48 million residents
- 555,000 housing units
- 457,000 jobs

This **Economic and Demographic Profile** is designed to provide GWH data for use by the West Houston Association and others seeking to develop and work here.

Overall Growth Summary for GWH

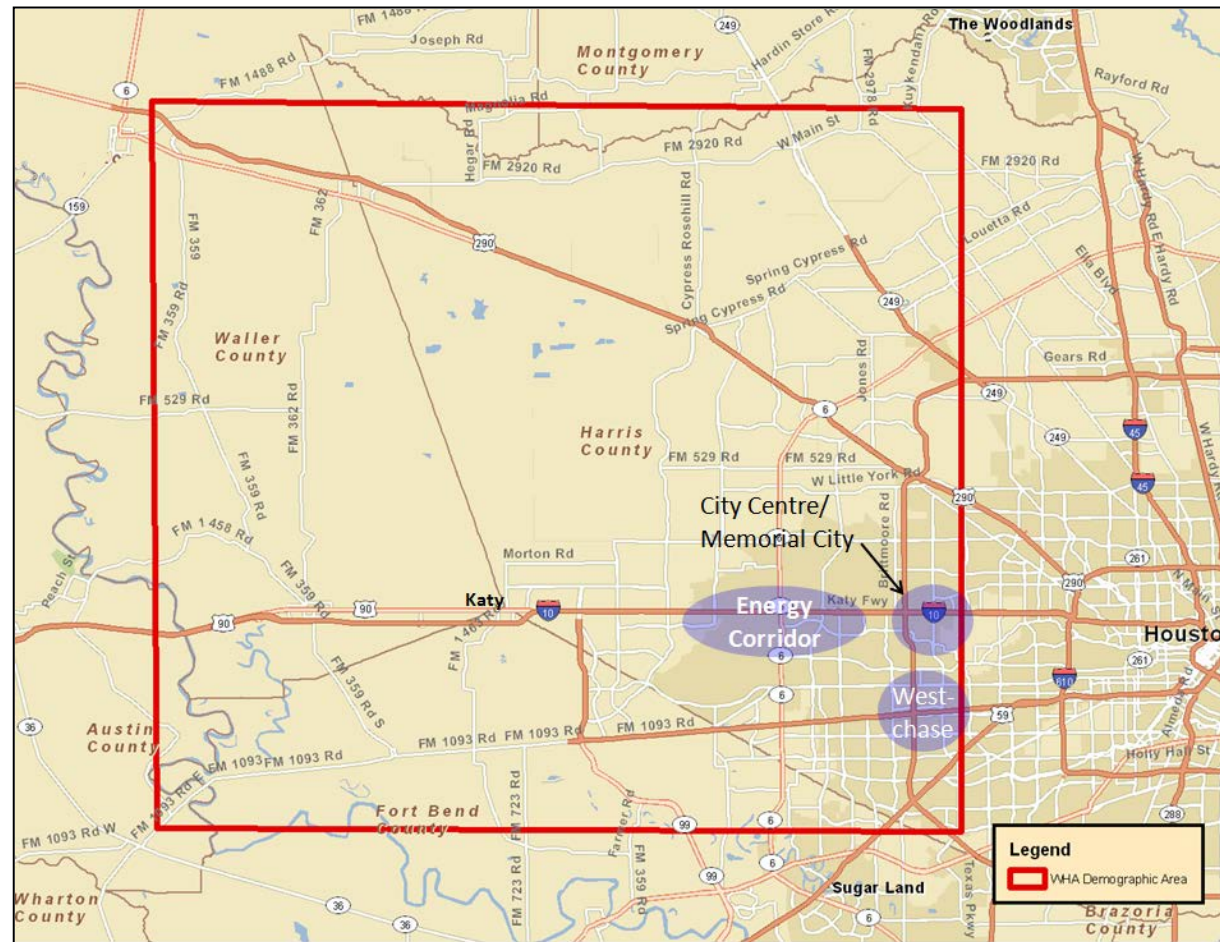
Year	Population	Housing Units	Jobs
1990	710,705	262,833	242,626
2000	1,001,921	378,619	318,378
2010	1,482,764	554,981	456,747
2015	1,642,201	615,249	500,945
2020	1,888,311	706,413	578,610
2025	2,112,457	788,486	649,138
2030	2,310,641	860,999	717,133
2035	2,471,546	919,289	776,762
2040	2,603,752	966,966	826,298
2050	2,861,735	1,012,844	930,563

Location Map within the Houston Sugar Land Baytown MSA



Greater West Houston Map

- The Energy Corridor
- Memorial City/City Centre/Town& Country
- Westchase



Map of Greater West Houston Regional Analysis Zones (RAZ)

The map on the right illustrates the Greater West Houston area with the Regional Analysis Zones used by H-GAC in their forecasting.

GWH Includes all of zones:

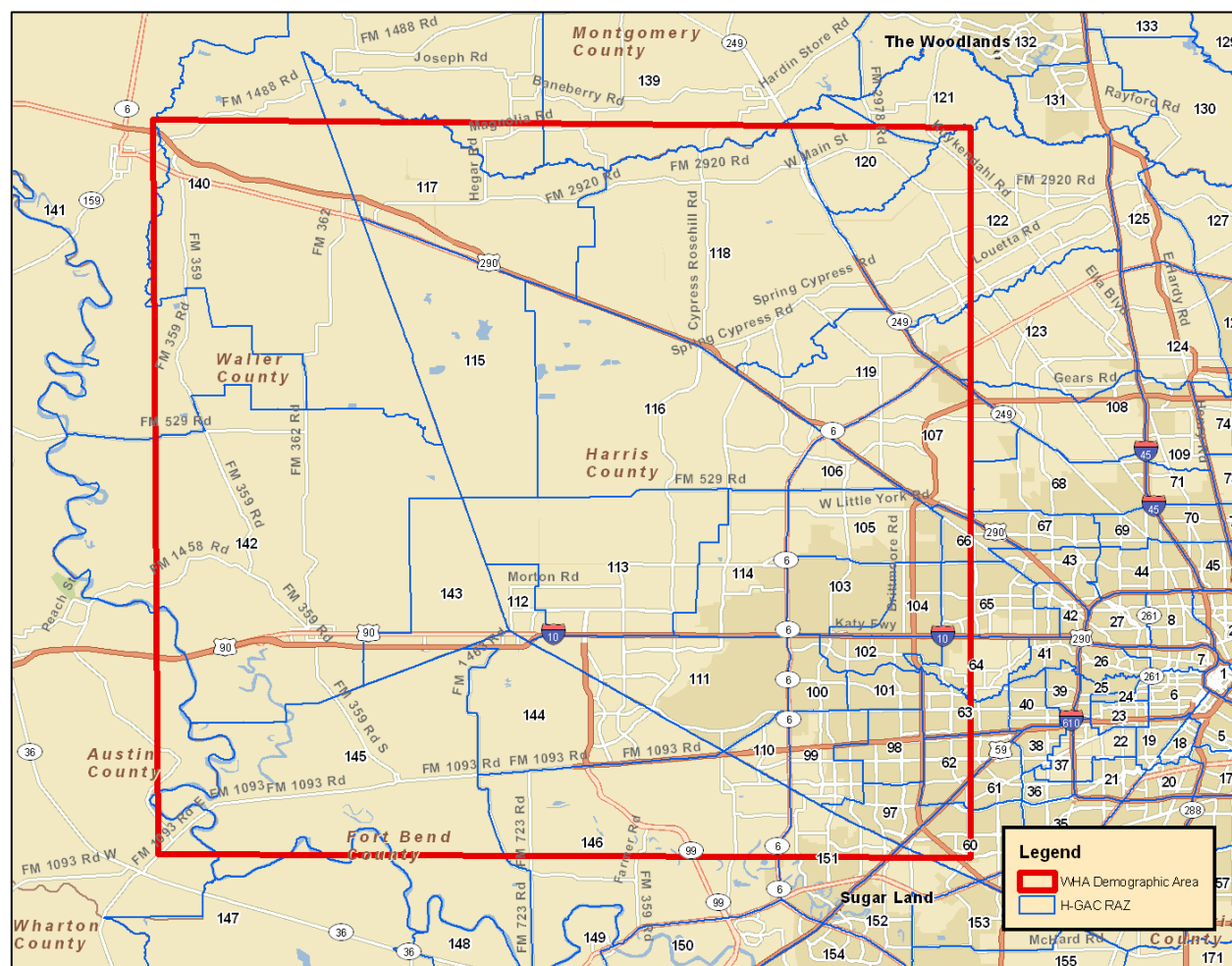
97	104	114
98	105	115
99	106	116
100	110	118
101	111	119
102	112	143
103	113	144

Most of Zones in GWH

107	120	145
117	142	

Part of Zones in GWH:

60	65	140
62	66	141
63	122	146
64	123	



3. Population

The chart on the right illustrates the historical census population for the Greater West Houston area and recent forecasts prepared by CDS.

According to these data, Greater West Houston added population:

The 1990's - 291,000

The 2000's - 481,000

And projected to add:

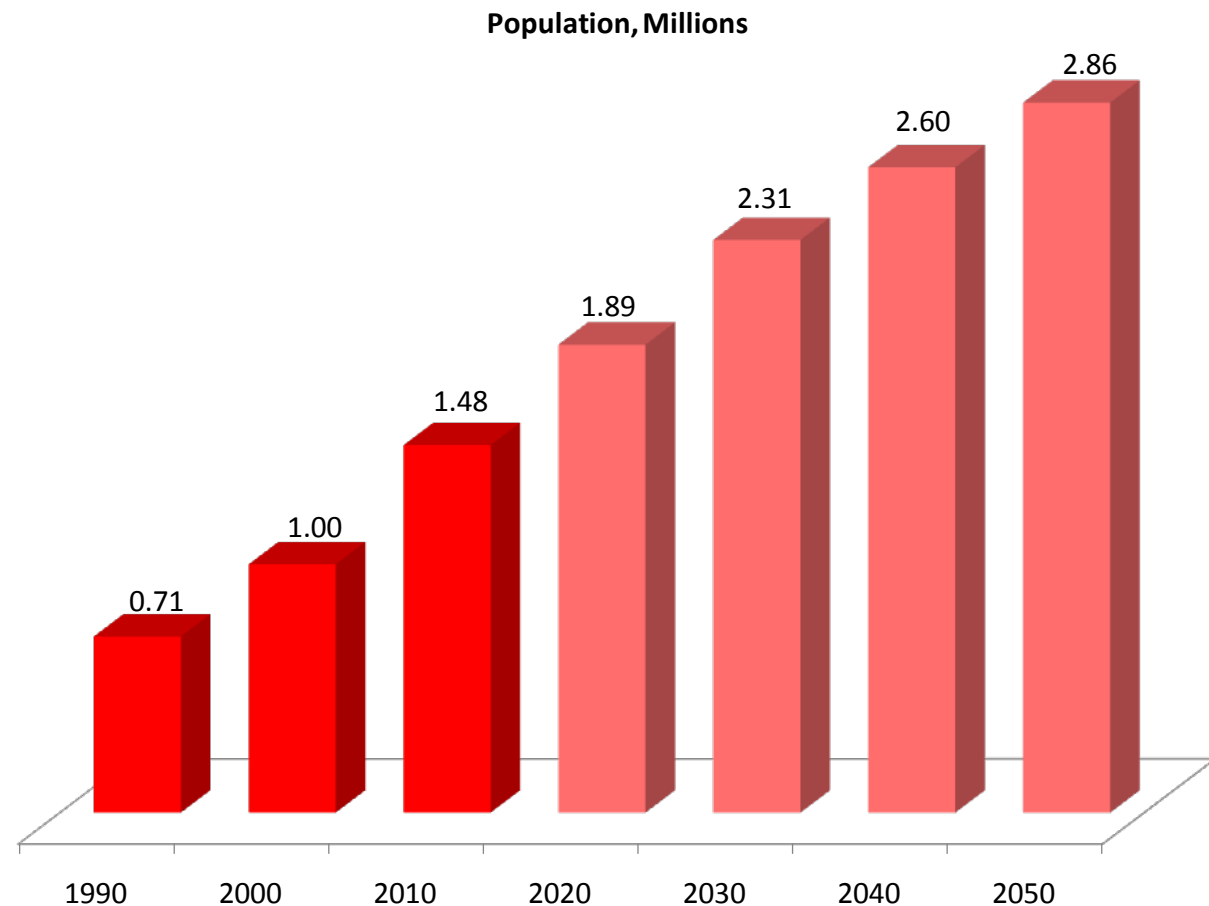
The 2010's - 405,000

The 2020's - 422,000

The 2030's - 293,000

The 2040's - 261,000

Population Trends in Greater West Houston



Source: U.S. Bureau of the Census for 1990, 2000, and 2010. CDS Market Research for Forecasts

Race and Ethnic Breakdown of Greater West Houston

In the decade of the 2000's, Greater West Houston gained substantial population in all racial and ethnic groups.

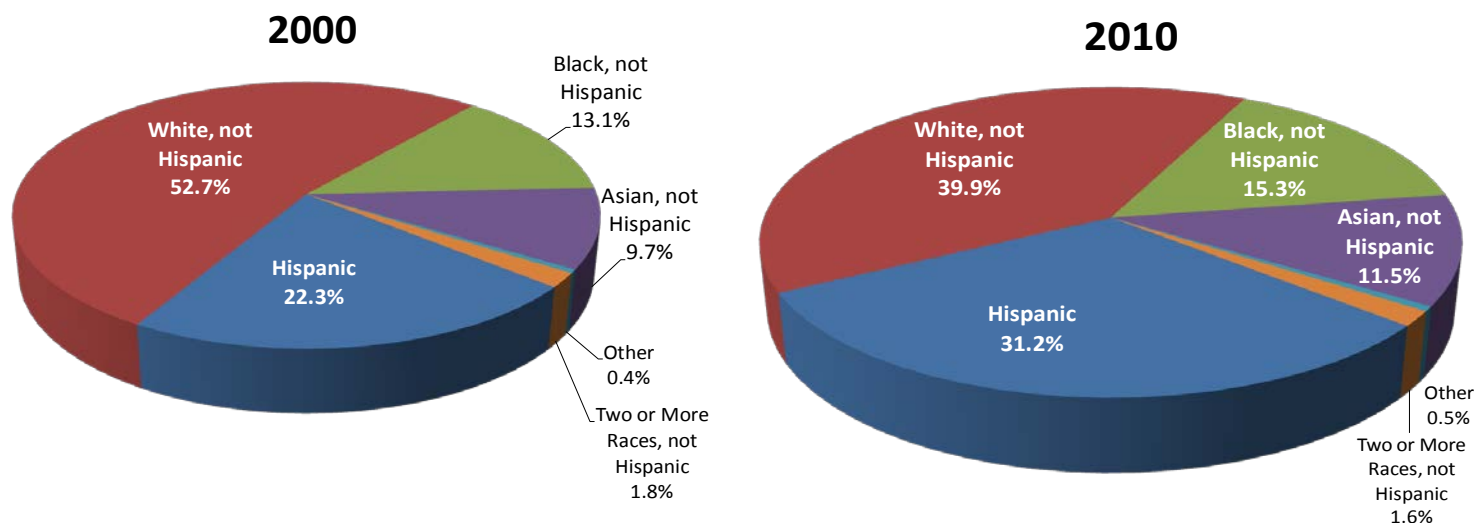
The growth of the Hispanic population was particularly dramatic, increasing 107% in the decade, adding almost 240,000 Hispanic residents in the area. One out of every two net new residents of Greater West Houston during the decade was Hispanic.

The Black population increased by 73% in the period and the Asian population increased by 75%.

Race and Ethnicity of the Greater West Houston Population

Single Ethnicity Categories (Sorted by 2010 Population)	2000 Census		2010 Census		Change	
	1,001,424	100%	1,480,320	100%	478,896	% Chg
White, not Hispanic	528,103	52.7%	590,710	39.9%	62,607	11.9%
Hispanic	222,972	22.3%	462,540	31.2%	239,568	107.4%
Black, not Hispanic	130,979	13.1%	226,164	15.3%	95,185	72.7%
Asian, not Hispanic	97,385	9.7%	170,034	11.5%	72,649	74.6%
Two or More Races, not Hispanic	17,635	1.8%	23,502	1.6%	5,867	33.3%
Some Other Race, not Hispanic	1,843	0.2%	3,448	0.2%	1,605	87.1%
American Indian, not Hispanic	2,108	0.2%	3,274	0.2%	1,166	55.3%
Hawaiian/Pacific Islander, not Hispanic	399	0.0%	649	0.0%	251	62.8%

Source: U.S. Bureau of the Census, 2010 Census redistricting data.

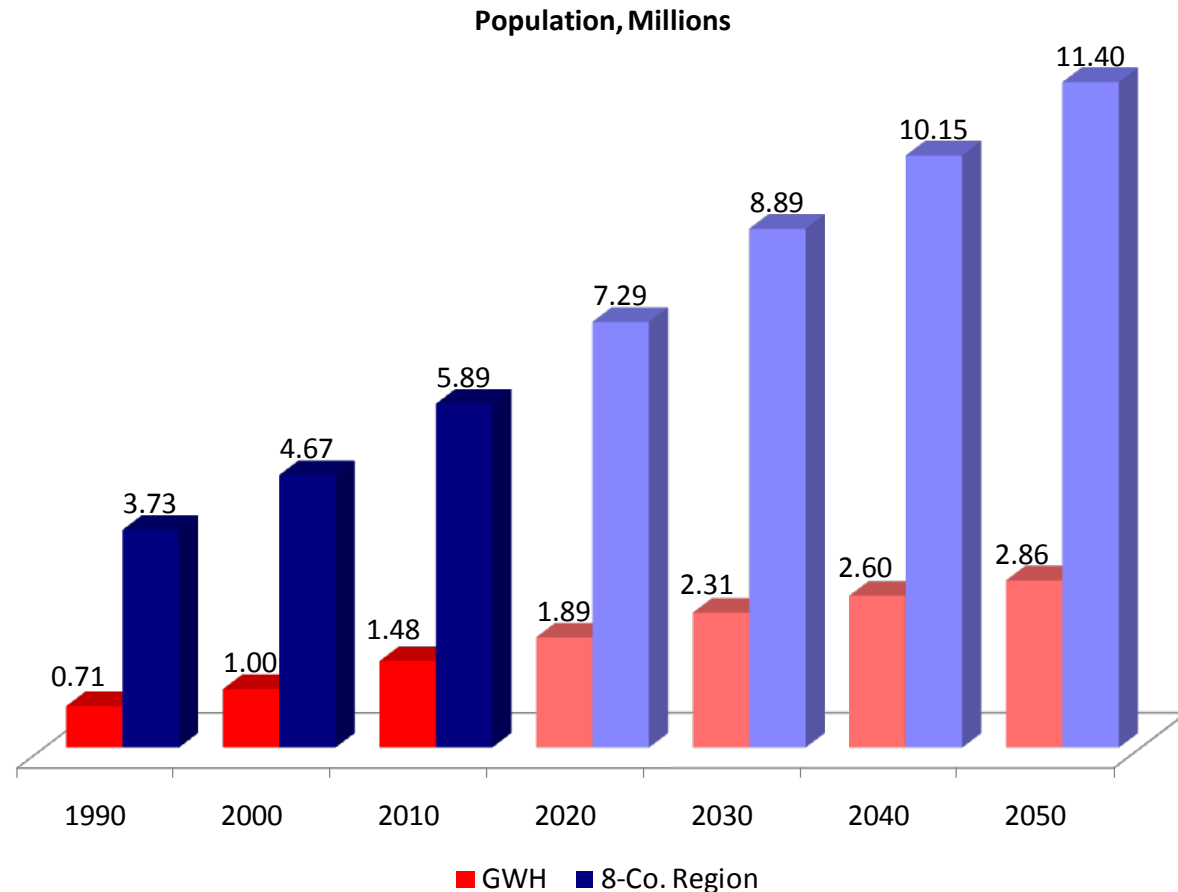


Comparisons of Greater West Houston and Houston metro area

The population of the Greater West Houston Area has increased its share of the 8-County Houston Region¹

In 1990, GWH comprised 19.0% of the region's population. By 2000, the area's share of the region increased to 21.5% and by 2010 to 25.1%. The forecasts produced by CDS increase the share that GWH maintains of the Houston region to 26.0% in 2030 and then slightly lower shares by 2040 and 2050 as many GWH areas are built out.

Greater West Houston as Compared to the Houston 8-County Region



¹ The 8-County Houston region includes Brazoria, Chambers, Fort Bend, Galveston, Harris, Liberty, Montgomery and Waller Counties and is the planning region for regional transportation programs.

4. Demographic Characteristics

Some of the demographic comparisons in this section are approximations for Greater West Houston based on reliable estimates. The 2010 Census data provides only Population, Race/Ethnicity, Total Housing Units and Occupied Housing units. The U.S. Census Bureau's American Community Survey is an ongoing process to capture the other demographic data for small areas. In cases, where 2010 data is not available from the Census, approximations using data from the 2010 Neilson/Claritas demographics were used to estimate GWH. These approximation include information on Age, Education, Income and Occupation. In the fall of 2011, it is expected that Neilson/Claritas will produce demographic estimates for 2011 based on the 2010 Census and the American Community Survey. When that data becomes available, it will be included.

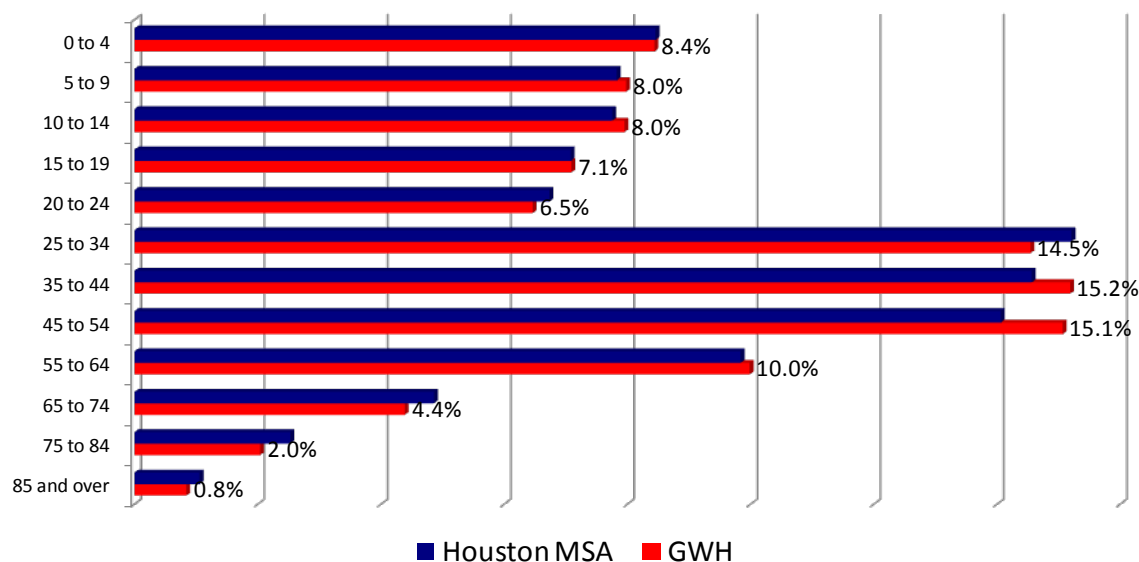
Age Distribution

The age distribution in GWH does not vary appreciably from the Houston MSA. According to this estimate, Greater West Houston has a slightly higher percentage of working age adults (20 to 64) at 61.3% compared to the MSA at 60.4%.

GWH has a slightly lower percentage of adults 65 and older at 7.3% compared to the region at 8.5%

Median age in GWH is estimated at 33.2 slightly higher than the MSA's 32.9%.

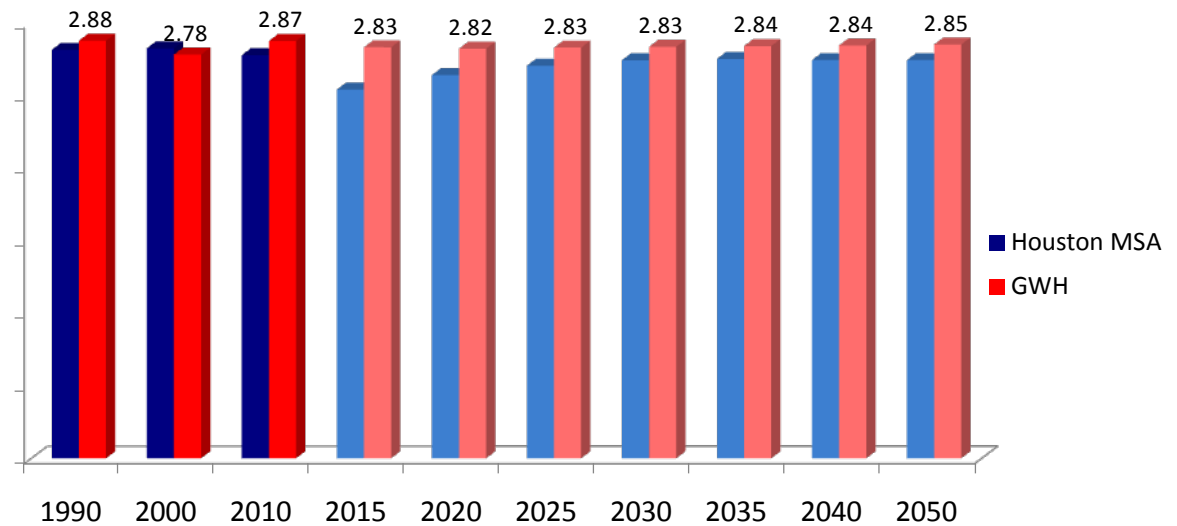
Age Distribution Comparison – 2010 Census



Household size

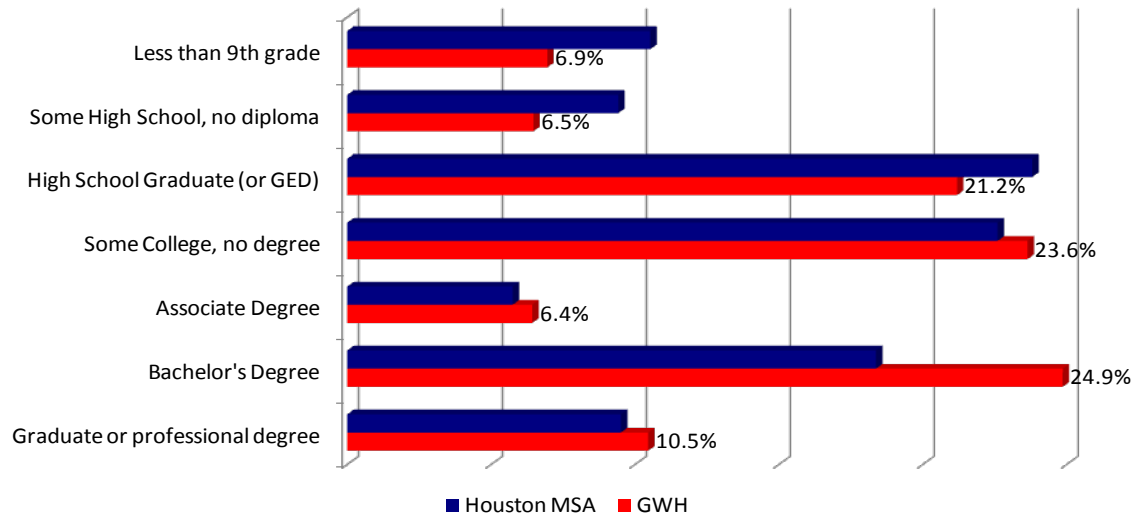
In 2000, GWH had an average household size of 2.78, which was lower than the MSA average of 2.81. However, household size in Greater West Houston is higher than the Houston region as a whole by 2010 (2.87 as compared to the Houston MSA average of 2.78). According to CDS projections, GWH household sizes will drop a bit by 2015 and then will remain relatively constant.

Household Size Comparison



Education

2010 Educational Attainment Comparison



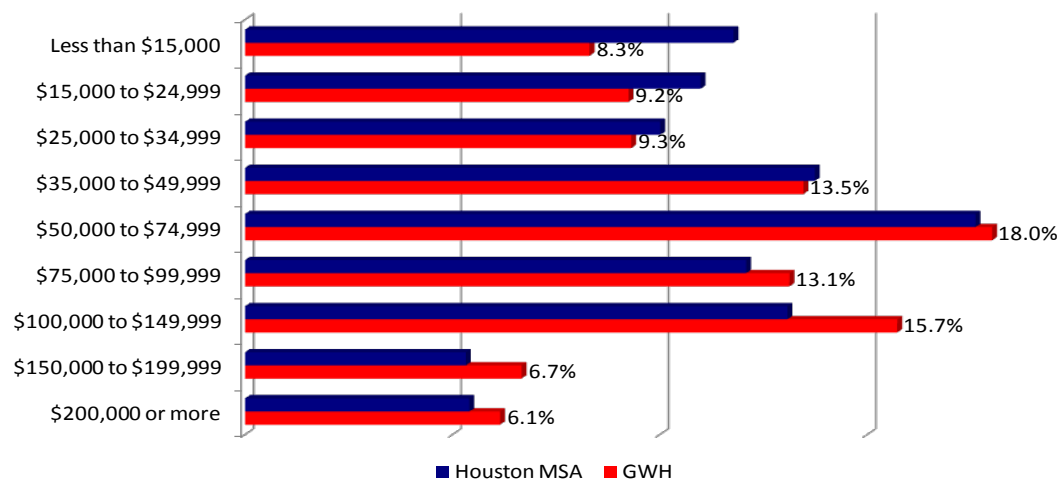
Educational attainment is significantly higher in the Greater West Houston than in the Houston MSA. In GWH, 41.7% of the adults have a college degree (Associate degree or higher) as compared with 33.6 in the MSA.

Only 34.6% of the GWH adults have not attended college compared to 43.8% in the Houston MSA.

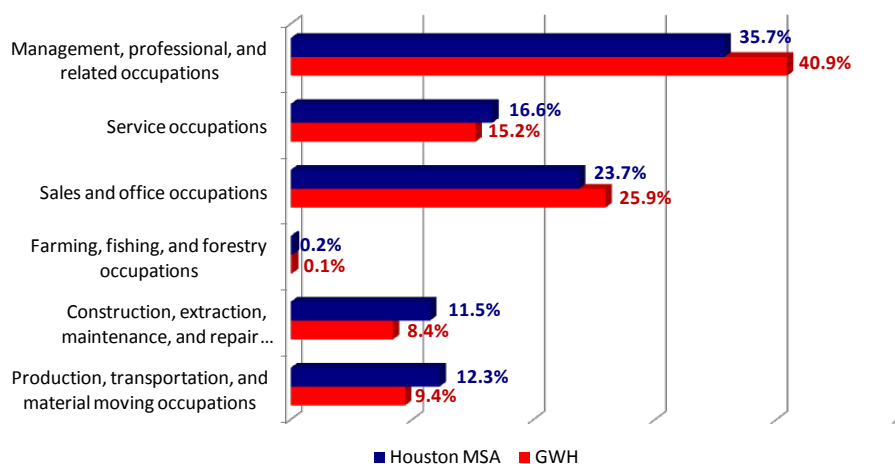
Income

Household income in GWH is generally higher than in the Houston region as a whole. In GWH, 59.7% of the households have incomes greater than \$50,000 as compared with 53.5% of the MSA households. The median household income in Greater West Houston is approximately \$61,501 and for the Houston MSA as a whole median income is \$54,000. All income figures are for 2009 as that was the year for the American Community Survey data for the Census. **The source of these data is the U.S. Census, American Community Survey.**

2009 Household Income Comparison



2010 Occupation Comparison



Occupations

The chart on the left illustrates the general occupation categories for Greater West Houston as compared with the Houston MSA.

Overall, GWH has a higher percentage of professional and office occupations (66.4%) than the Houston MSA (59.4%)

The source of these data is the U.S. Census, American Community Survey

5. Employment

Historical and projected Jobs

The chart on the right illustrates the historical jobs for the Greater West Houston area and recent forecasts prepared by CDS. These data are for “employees by place of work” (employees who work in GWH – not employed persons who live in GWH).

According to these data, Greater West Houston added jobs:

The 1990's 73,000

The 2000's 51,000

And projected to add:

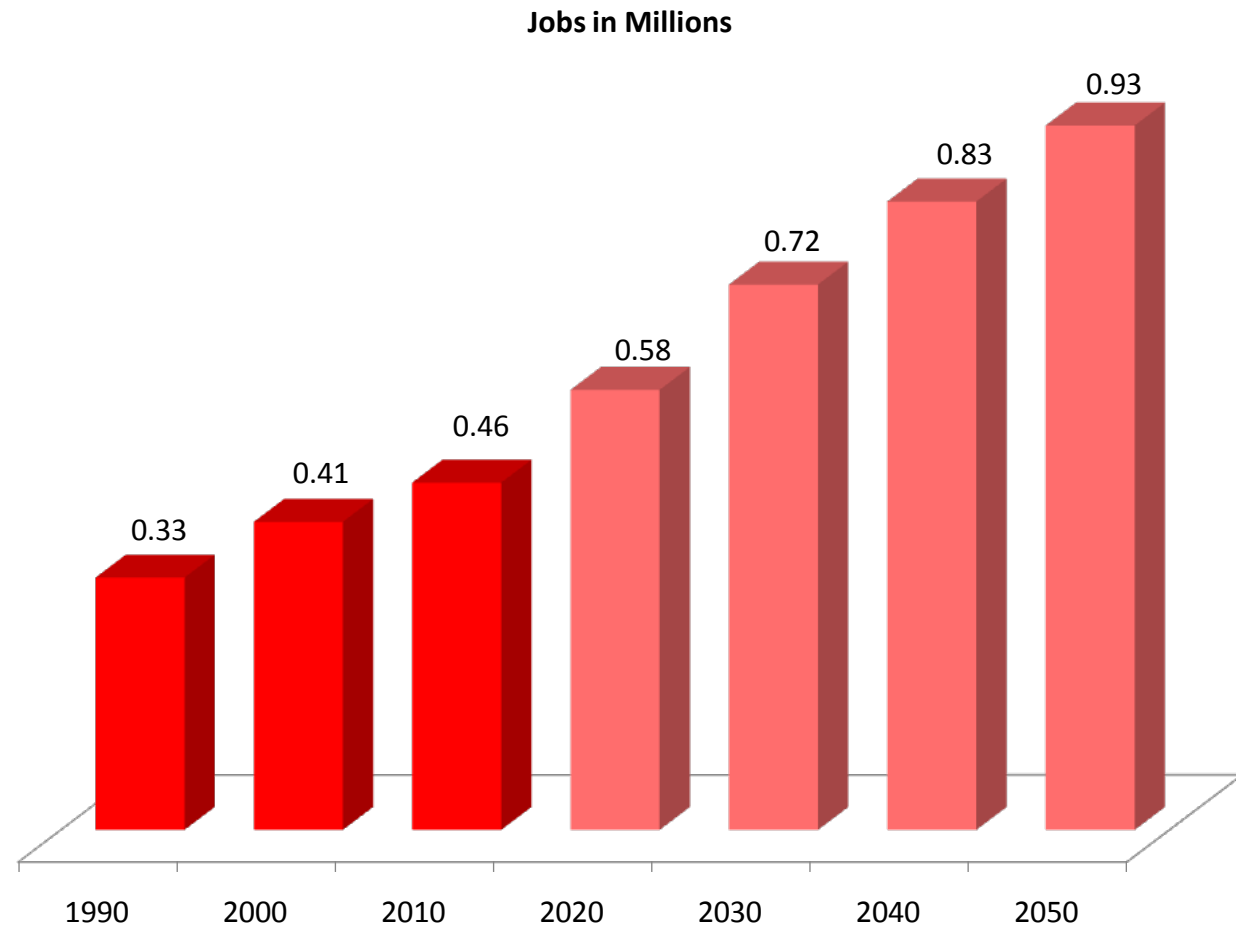
The 2010's 122,000

The 2020's 138,000

The 2030's 109,000

The 2040's 100,000

Jobs Trends in Greater West Houston



Source: Houston-Galveston Area Council for 1990, 2000, and 2010. CDS Market Research for Forecasts

Comparison of Jobs by Sector

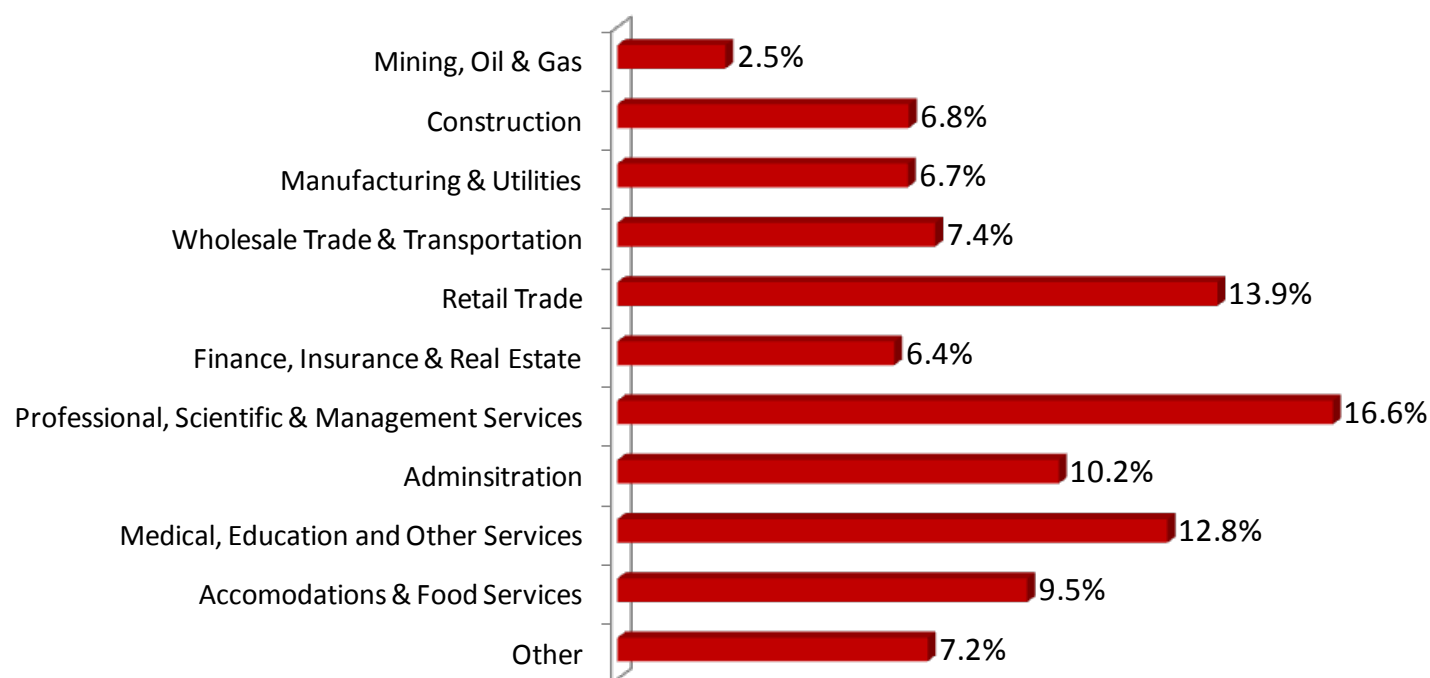
The chart on the right illustrates the profile of job in GWH.

According to **County Business Patterns**, GWH has a significantly higher proportion of jobs in the following sectors than the Houston MSA as a whole:

- Mining (oil & gas)
- Retail Trade
- Information
- Professional, scientific/ technical services; and
- Administration, support/waste mgmt.

Share of Job by Sector, 2008

Zip Code representation of GWH compared to Houston Sugar Land Baytown MSA



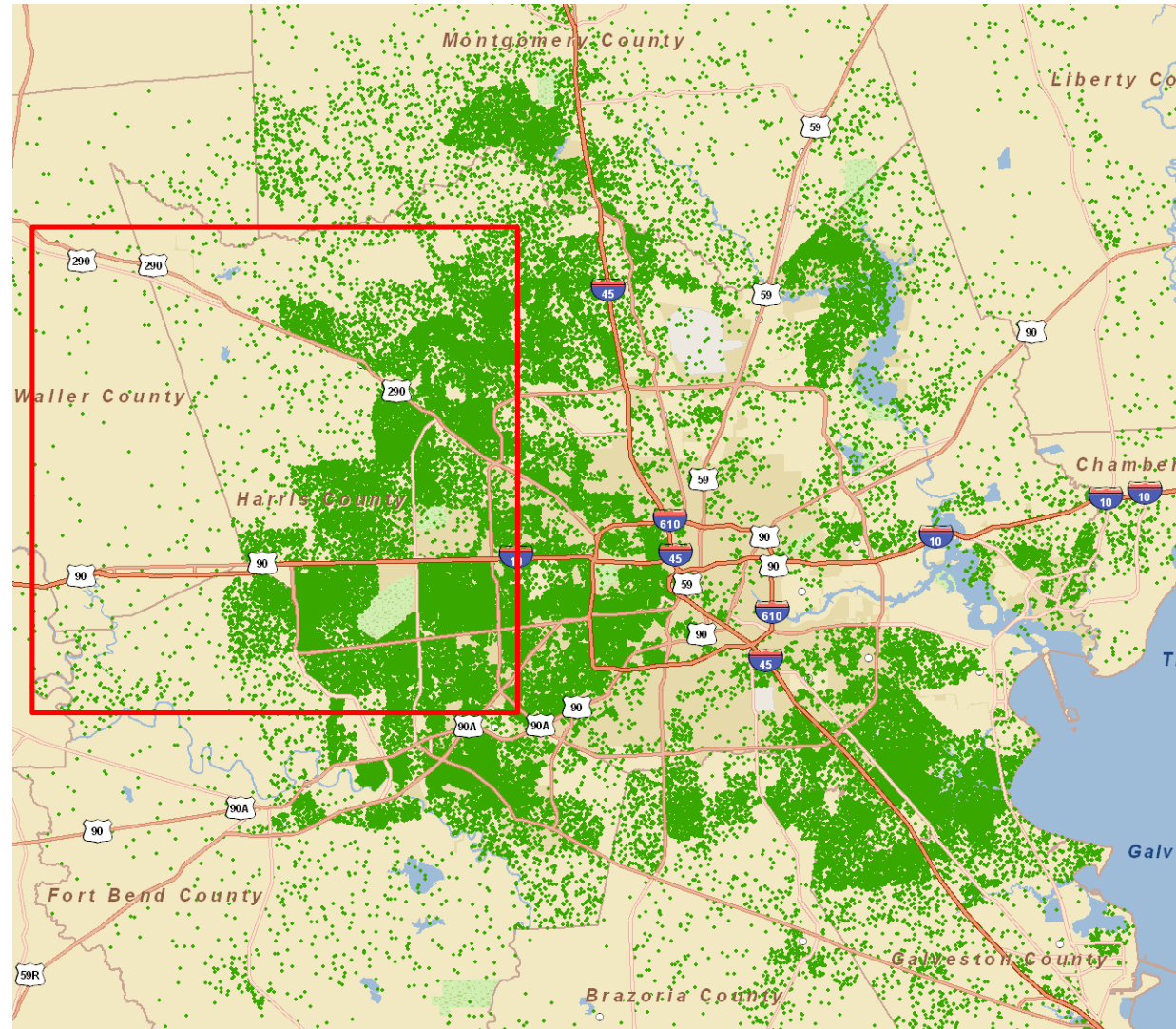
Source: U.S. Bureau of the Census, County Business Patterns

Map of the Residences of Engineers and Architects in the Houston Area

Key Occupation for GWH - Engineers

Engineers and Architects in the Houston Region

The map on the right illustrates the density of engineers and architects in the Houston area. Each dot represents one person with either of those occupations according to the Neilson/Claritas demographic database.



Source: Neilson/Claritas

6. Comparison of GWH with Selected national cities

Comparison Metric	Greater West Houston	City of Denver, CO	City of San Antonio, TX	City of Fort Worth, TX	City of Austin, TX	City of Phoenix, AZ	City of Jacksonville, FL	City of Houston, TX
Area, sq. miles	1,000	155	467	348	253	518	875	628
2010 Population	1,482,764	600,158	1,327,407	741,206	790,390	1,445,632	821,784	2,099,451
2000 Population	1,001,921	554,636	1,144,646	537,694	656,562	1,321,045	735,617	1,953,631
Population Growth	48.0%	8.2%	16.0%	37.8%	20.4%	9.4%	11.7%	7.5%
1990 Population	710,705	467,610	935,933	447,619	465,622	983,403	n/a	1,630,553
Housing Units, 2010	554,980	285,797	524,246	291,086	354,241	590,149		892,646
Median HH Income	\$61,501	\$46,410	\$42,513	\$47,634	\$50,132	\$47,085	\$46,312	\$42,945
Average HH Size	2.87	2.38	2.90	2.81	2.42	3.04	2.55	2.89
Median Home Value	\$155,300	\$244,600	\$114,400	\$121,700	\$214,300	\$182,300	\$166,500	\$128,000
SF Housing Units	372,950	164,216	370,885	212,549	197,454	415,170	269,196	520,368
MF Housing Unit	182,030	115,359	150,785	73,977	148,342	192,712	102,239	438,204
% SF of all Units	67.2%	58.7%	71.1%	74.2%	57.1%	68.3%	72.5%	54.3%
2010 Jobs	456,474	446,034	698,343	363,292	557,183	820,515	466,041	1,545,252

7. Appendices

A-1 Occupation for GWH Workers

The demographics research firm of Neilson/Claritas provides a little extra detail on occupations than the American Community Survey of the Census described previously.

While one out of every 3.3 workers in the Houston MSA live in Greater West Houston, one out of every 2.5 architects and engineers resides in the area. Almost 5% of GWH workers are architects, engineers or scientists.

Occupations in Greater West Houston

2010 Estimated Employed Population by Occupation	868,070	GWH	Houston MSA	2,876,618
Management , Including Farmers and Farm Managers	96,214	11.1%	263,553	9.2%
Business and Financial Operations	48,111	5.5%	130,886	4.5%
Computer and Mathematical	24,776	2.9%	61,549	2.1%
Architecture and Engineering	31,932	3.7%	82,458	2.9%
Life, Physical, and Social Science	10,123	1.2%	32,055	1.1%
Community and Social Services	8,113	0.9%	27,394	1.0%
Legal	10,377	1.2%	33,853	1.2%
Education, Training, and Library	46,518	5.4%	150,614	5.2%
Arts, Design, Entertainment, Sports, and Media	14,313	1.7%	42,785	1.5%
Healthcare Practitioners and Technical	32,216	3.7%	116,466	4.0%
Healthcare Support	12,712	1.5%	45,970	1.6%
Protective Service	14,892	1.7%	54,307	1.9%
Food Preparation and Serving Related	39,720	4.6%	137,192	4.8%
Building and Grounds Cleaning, and Maintenance	30,078	3.5%	117,151	4.1%
Service : Personal Care and Service	25,679	3.0%	79,401	2.8%
Sales and Related Occupations	113,636	13.1%	316,845	11.0%
Office and Administrative Support	117,393	13.5%	371,194	12.9%
Farming, Fishing, and Forestry	934	0.1%	4,778	0.2%
Construction and Extraction	47,949	5.5%	227,363	7.9%
Installation, Maintenance, and Repair	26,637	3.1%	103,345	3.6%
Production	43,924	5.1%	174,640	6.1%
Transportation and Material Moving	37,950	4.4%	172,028	6.0%

Source: Nielsen/Claritas 2011

A-2 Population by RAZ

The table on the right presents the Regional Analysis Zones which are wholly or partially within Greater West Houston. This table totals to a larger population than previously described due to zones which are only partially within Greater West Houston.

Population in Regional Analysis Zones

RAZ	1990	2000	2005	2010	2015	2020	2025	2030	2035	2040	2045o	2050
60	62,877	79,845	82,704	76,730	77,075	78,470	79,698	80,812	81,547	82,059	82,537	82,980
62	51,030	70,290	72,699	69,472	70,277	71,523	72,445	73,200	73,696	74,084	74,621	75,206
63	37,548	43,258	44,563	49,107	50,800	54,498	57,468	59,735	61,211	62,047	62,628	62,958
64	22,154	22,884	23,092	22,809	23,326	24,151	24,757	25,273	25,609	25,846	26,072	26,285
65	72,139	85,193	86,253	83,084	84,099	86,122	86,716	87,222	87,551	87,784	88,005	88,214
66	6,814	8,137	8,104	9,692	10,436	11,581	12,415	13,103	13,548	13,857	14,145	14,410
97	43,968	53,531	53,040	53,673	55,053	57,048	58,453	59,644	60,413	60,944	61,436	61,888
98	34,559	43,660	46,218	50,507	52,276	55,097	57,169	59,434	61,086	62,419	63,971	65,608
99	41,111	55,811	61,926	72,046	76,502	80,904	84,162	86,830	88,581	89,866	91,131	92,371
100	16,362	23,565	25,636	32,605	37,415	42,969	46,479	49,199	50,675	51,719	52,712	53,650
101	31,343	36,953	37,126	34,196	34,196	34,238	34,299	34,349	34,382	34,418	34,454	34,489
102	30,719	31,640	32,029	33,201	34,582	36,517	37,863	38,999	39,732	40,238	40,706	41,136
103	114	543	721	536	2,261	5,705	8,391	10,745	12,282	13,348	14,340	15,254
104	21,795	25,103	24,799	23,758	24,997	26,906	28,296	29,443	30,184	30,699	31,178	31,620
105	23,533	36,702	43,344	46,515	48,498	51,934	54,714	57,238	59,017	60,355	61,708	63,069
106	8,865	12,732	15,906	17,295	18,305	19,311	19,895	20,353	20,640	20,837	21,017	21,180
107	42,190	67,320	74,873	85,845	91,020	98,990	103,160	106,372	108,300	109,329	109,965	110,216
110	18,157	22,395	25,462	29,461	31,095	33,725	35,685	37,332	38,397	39,149	39,862	40,534
111	29,835	48,607	57,263	61,439	62,642	64,863	66,483	67,843	68,729	69,356	69,952	70,515
112	6,359	9,611	10,964	11,344	12,706	15,806	18,298	20,503	21,947	22,949	23,883	24,745
113	27,234	45,245	61,276	110,699	128,378	157,158	178,542	196,277	209,429	219,539	229,976	240,676
114	27,372	39,961	47,008	67,033	73,319	81,411	84,426	85,693	86,512	87,090	87,639	88,156
115	665	1,392	1,917	2,155	3,364	9,835	15,260	20,390	24,760	28,877	33,842	39,603
116	21,618	34,912	49,563	91,057	109,162	136,269	157,971	178,356	191,467	200,937	210,140	219,035
117	3,312	5,084	5,950	6,462	7,671	13,217	18,642	23,625	27,721	31,191	35,077	39,347
118	18,576	46,091	68,711	100,787	113,348	141,822	162,711	179,382	190,890	199,810	209,089	218,668
119	41,607	51,629	58,452	68,126	72,964	78,510	81,494	83,802	85,133	85,997	86,738	87,357
120	7,587	10,429	11,742	12,136	14,020	17,681	20,665	23,743	26,072	28,145	30,551	33,268
122	69,796	91,845	105,419	150,935	174,333	207,225	232,727	245,381	252,779	258,131	263,341	268,386
140	11,236	16,032	16,776	21,539	23,411	29,044	41,201	53,867	65,881	75,942	85,809	95,980
141	5,709	7,573	9,539	9,189	9,677	11,555	16,331	21,960	27,967	33,601	39,775	46,873
142	5,155	7,684	7,833	9,966	11,796	18,137	33,265	49,624	65,779	79,892	94,359	109,982
143	1,290	1,374	1,616	2,511	3,645	8,160	19,137	31,222	43,299	53,978	65,058	77,166
144	2,686	19,074	36,706	77,528	96,895	116,411	129,253	136,873	140,559	142,312	142,216	140,392
145	3,059	4,656	5,759	10,376	16,186	30,507	53,864	79,092	106,708	134,707	162,770	190,791
146	31,624	51,744	64,485	114,335	138,544	170,766	200,763	230,358	258,560	284,961	309,375	331,843
	817,121	1,132,660	1,296,770	1,641,419	1,817,199	2,099,596	2,353,400	2,576,462	2,759,496	2,914,354	3,067,541	3,220,871

Source: U.S. Bureau of the Census for 1990, 2000, 2010. CDS Market Research for Projections for all future years.

A-3 Jobs by RAZ

The table on the right presents the historical and projected jobs in the Regional Analysis Zones which are wholly or partially within Greater West Houston. This table totals to a larger number of jobs than previously described. This difference, as in the case of the population data presented previously, is due to zones which are only partially within Greater West Houston.

Jobs in Regional Analysis Zones

RAZ	1990	2000	2005	2010	2015	2020	2025	2030	2035	2040	2045o	2050
60	10,970	16,157	12,353	12,807	13,447	14,764	15,904	16,944	17,831	18,614	19,418	20,212
62	29,433	32,187	34,593	33,681	34,434	36,143	37,691	39,221	41,809	44,174	46,680	49,226
63	31,034	39,113	42,891	42,251	43,532	46,381	49,561	52,688	55,421	57,948	60,553	63,134
64	12,549	14,767	16,994	16,354	16,910	18,798	20,629	22,357	23,848	25,169	26,530	27,878
65	26,716	31,206	33,472	34,532	35,761	38,154	40,189	42,035	43,607	44,994	46,417	47,821
66	15,903	27,599	26,678	26,735	27,781	30,425	32,843	35,089	37,015	38,718	40,470	42,202
97	12,637	17,139	15,030	15,585	16,234	17,500	18,579	19,557	20,390	21,125	21,879	22,623
98	16,275	22,769	25,052	25,010	25,622	27,141	28,517	30,047	31,341	32,462	33,593	34,692
99	9,702	10,929	10,200	10,583	10,990	11,878	12,752	13,818	14,709	15,468	16,219	16,955
100	9,665	15,192	13,768	23,918	32,572	45,965	56,617	67,395	73,188	76,310	79,404	82,356
101	10,966	16,968	14,224	14,923	15,354	15,958	16,406	16,793	17,117	17,400	17,690	17,974
102	29,548	21,214	23,541	23,877	24,348	25,297	26,157	26,922	27,569	28,130	28,696	29,245
103	879	557	1,419	1,455	1,737	2,687	4,407	5,937	7,231	8,569	10,130	11,843
104	15,980	27,527	27,687	27,053	27,918	29,593	31,114	32,461	33,620	34,624	35,638	36,623
105	6,603	22,725	31,149	30,937	31,937	34,658	37,189	39,549	41,577	43,372	45,218	47,045
106	1,763	7,136	10,583	10,971	11,320	11,936	12,443	12,897	13,282	13,622	13,970	14,313
107	11,316	31,415	29,074	30,187	31,469	33,961	36,079	38,000	39,635	41,078	42,558	44,018
110	5,623	4,753	3,233	3,526	3,688	3,892	4,035	4,155	4,255	4,342	4,431	4,518
111	6,501	15,291	13,360	14,065	14,630	15,769	16,808	17,737	18,513	19,524	20,526	21,482
112	4,294	3,866	3,722	3,972	4,163	4,562	4,888	5,179	5,362	5,522	5,685	5,845
113	2,065	6,248	8,497	9,363	10,509	13,104	15,490	17,621	19,641	21,663	23,667	25,770
114	6,052	17,100	20,920	21,368	23,964	27,312	29,268	31,156	33,533	35,555	37,559	39,662
115	38	236	387	806	1,283	2,282	3,096	3,823	4,433	4,967	5,510	6,042
116	2,226	6,849	7,575	8,070	8,643	11,637	14,897	17,802	20,489	23,159	26,184	29,433
117	171	893	940	1,293	1,675	2,673	3,651	4,522	5,255	5,896	6,548	7,186
118	1,836	8,867	9,451	11,410	12,365	14,860	17,305	19,484	21,316	22,918	24,548	26,144
119	13,495	27,605	15,891	16,734	17,635	20,238	21,540	22,714	23,712	24,592	25,494	26,383
120	5,668	9,165	8,887	9,761	10,429	11,827	12,968	13,984	14,839	15,587	16,348	17,093
122	10,178	21,715	23,170	24,669	29,442	39,425	50,833	58,095	62,981	65,117	65,230	65,338
140	4,238	4,729	4,737	5,010	5,868	7,297	9,152	11,140	13,102	14,927	16,853	18,800
141	1,874	2,029	2,072	2,260	2,691	3,361	4,186	4,995	5,760	6,473	7,224	7,983
142	1,227	2,729	3,137	4,487	5,774	7,951	10,734	13,634	16,458	19,159	22,088	25,124
143	274	365	833	1,004	2,291	4,400	7,099	9,750	12,261	14,523	16,835	19,093
144	1,071	5,672	5,265	7,262	12,527	19,013	25,111	31,316	37,255	42,894	49,311	56,015
145	323	925	1,896	2,793	4,093	5,933	7,908	10,353	12,343	13,696	15,168	16,641
146	6,359	5,763	5,038	7,210	13,965	23,351	32,176	41,156	49,751	57,415	65,266	73,125
	314,481	483,242	495,365	523,115	573,552	665,362	752,319	833,382	902,617	961,094	1,020,122	1,079,628

Source: U.S. Bureau of the Census for 1990, 2000, 2010. CDS Market Research for Projections for all future years.

A-4 GWH Business Summary

Data from U.S. Census, County Business Patterns, for Zips:

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Greater West Houston Establishments and Jobs by Sector, 2008

Zip Code representation of GWH

NAICS	SECTOR	Establishments	Estimated Employees
11	Forestry, fishing, hunting, and Agriculture Support	21	56
21	Mining, quarrying, and oil and gas extraction	297	11,606
22	Utilities	70	2,884
23	Construction	1800	31,328
31	Manufacturing	918	28,330
42	Wholesale trade	2102	27,140
44	Retail trade	3579	64,513
48	Transportation and warehousing	446	7,017
51	Information	409	15,339
52	Finance and insurance	1981	18,555
53	Real estate and rental and leasing	1407	11,224
54	Professional, scientific, and technical services	3861	53,929
55	Management of companies and enterprises	229	22,991
56	Administrative and Support and Waste Mgmt and Remediation	1599	47,447
61	Educational services	327	5,044
62	Health care and social assistance	2656	47,133
71	Arts, entertainment, and recreation	264	6,945
72	Accommodation and food services	2199	44,050
81	Other services (except public administration)	1910	17,844
99	Industries not classified	47	113
	Totals	26,122	463,375

Source: U.S. Bureau of the Census, County Business Patterns

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