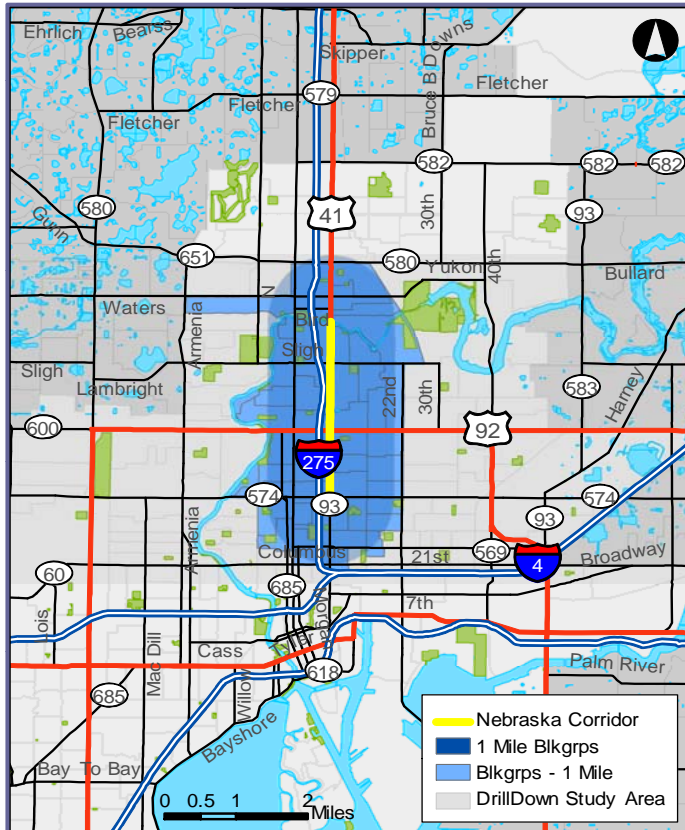


Nebraska Corridor - 1 Mile

DrillDown Market Overview



*IRS Adjusted Gross Income adjusted for inflation

Tampa-St. Pete-Clearwater MSA Income per Acre = \$42,365

	2008 DRILLDOWN	2008 Traditional Est.	2000 Census	Comparison DrillDown/Trad. Est.
MARKET SIZE				
Total Population	48,946	45,281	44,035	8.1%
Population per Acre	8.7	8.0	7.8	
Total Households	18,438	17,106	16,624	7.8%
% Change in USPS Count	4% ('05-'07)			
% Change IRS Returns	5% ('98-'05)			
MARKET STRENGTH				
Average Household Income	\$43,641	\$42,116	\$35,018	3.6%
Median Household Income	\$33,613	\$34,209	\$28,792	-1.7%
Aggregate Neighborhood Income	\$805 Million	\$720 Million	\$582 Million	11.7%
% Informal Economy	6.1%			
Aggregate Income per Acre	\$142,225	(3 times the Tampa-St. Pete-Clearwater MSA income per acre)		
Average Income New Home Buyers	\$59,369	(70% above Census 2000 average income)		
% Change in Adj. Gross Income	8% ('98-'05)			
MARKET STABILITY				
% Owner Occupancy - Unit	56.3%	60.9%	60.6%	
% Owner Occupancy - Bldg	70.8%			
Median Home Sale Value	\$182,574	\$131,196	\$63,143	39.2%
New Residential Units	590	35.5 per 1,000 households		
Residential Rehab Activity	19.6 % of residential buildings			
Change in Crime ('02 - '06)	-31% (Violent)	-31% (Property)	-31% (Total)	
Incidents per 1,000 Persons ('06)	16.2 (Violent)	77.6 (Property)	93.8 (Total)	

In partnership with the City of Tampa Department of Economic and Urban Development, Social Compact applied its Neighborhood Market DrillDown analysis citywide with a particular emphasis on Tampa's Community Redevelopment Areas (CRAs). The 2008 Tampa DrillDown serves as an additional information source that can aid local government, community and business leaders to uncover market strengths and opportunities in the City's underserved neighborhoods, attract investment to these areas and inform the City's comprehensive economic development agenda going forward. DrillDown study area neighborhoods include: Central Park CRA; Channelside CRA; Downtown CRA; Drew Park CRA; East Tampa CRA; Tampa Heights CRA; and Ybor CRA.

Nebraska Corridor - 1 Mile

DrillDown Market Overview

BUSINESSES	Total #	Total Revenue	Total # Employees	Estimated Employee Annual Spending Potential
All Businesses	1,495	\$1,792 Million	10,152	x \$2,787 / yr = \$28.3 Million in employee spending

RETAIL DEMAND	Estimated Revenue	Resident Expenditures	Estimated Leakage	Estimated Sq. Ft. Potential
All Retail	\$.4 Billion	\$.2 Billion	-\$0.2 Billion	
Apparel	\$5.7 Million	\$26.7 Million	\$21.0 Million	61,706
Grocery	\$64.2 Million	\$53.1 Million	-\$11.1 Million	0
Restaurants	\$33.4 Million	\$38.6 Million	\$5.2 Million	22,343

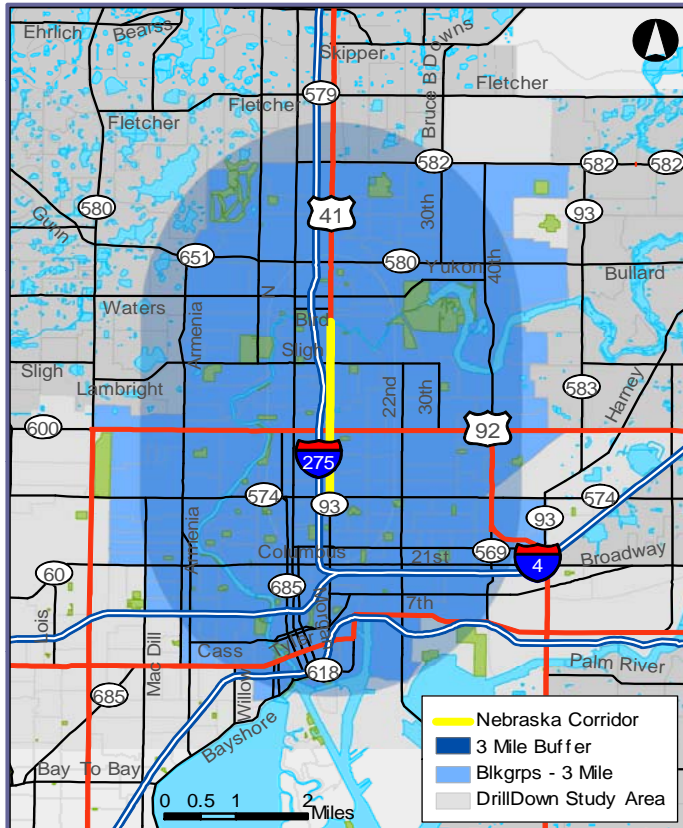
GROCERY DEMAND	Total #	# per 10K HH	Average Distance	Total Expenditures	Total Leakage	Estimated Sq. Ft. Potential
All Grocers	19	10.3		\$53.1 Million		
Full Service Grocers Only	3	1.6	0.76 mi		-\$11.1 Million	0

FINANCIAL SERVICES	Total #	# per 10K HH	Average Distance
Banks & Credit Unions	2	1.1	
Banks Only	1	0.5	1.17 mi
Pawnshops, Checkcashers, Payday Lenders	22	11.9	1.12 mi
% of Households lacking credit histories = 16%			

SOCIAL COMPACT is a national not-for-profit corporation led by a board of business leaders whose mission is to help strengthen neighborhoods by stimulating private market investment in underserved communities. The lack of dependable business-oriented data on inner-city communities expands the information gap on market trends, disabling potential investors from making informed decisions. Established to provide up-to-date profiles of market size, strength, and stability for small, dense, and rapidly changing urban geographies, Social Compact's Neighborhood Market DrillDown addresses key barriers to private investment in and around inner-city neighborhoods - a lack of information and negative stereotyping. The DrillDown uses numerous sources of market data to identify the fundamental business attributes and market characteristics of urban communities and aims to expose market anomalies and opportunities that may have previously been overlooked by traditional market analyses. The DrillDown serves as a resource to community organizations, government decision makers and the private sector. Social Compact is at the forefront of identifying the market potential of underserved neighborhoods and believes that a public private partnership that involves community members and leverages private investment is the most sustainable form of community economic development.

Nebraska Corridor - 3 Mile

DrillDown Market Overview



*IRS Adjusted Gross Income adjusted for inflation

Tampa-St. Pete-Clearwater MSA Income per Acre = \$42,365

	2008 DRILLDOWN	2008 Traditional Est.	2000 Census	Comparison DrillDown/Trad. Est.
MARKET SIZE				
Total Population	177,134	176,268	166,758	0.5%
Population per Acre	7.1	7.1	6.7	
Total Households	69,229	69,242	65,350	0.0%
% Change in USPS Count	5% ('05-'07)			
% Change IRS Returns	5% (98-'05)			
MARKET STRENGTH				
Average Household Income	\$44,587	\$40,689	\$35,613	9.6%
Median Household Income	\$33,376	\$31,403	\$26,612	6.3%
Aggregate Neighborhood Income	\$3.1 Billion	\$2.8 Billion	\$2.3 Billion	9.6%
% Informal Economy	6.3%			
Aggregate Income per Acre	\$123,602	(3 times the Tampa-St. Pete-Clearwater MSA income per acre)		
Average Income New Home Buyers	\$62,381	(75% above Census 2000 average income)		
% Change in Adj. Gross Income	11% ('98-'05)			
MARKET STABILITY				
% Owner Occupancy - Unit	52.5%	52.8%	53.1%	
% Owner Occupancy - Bldg	70.5%			
Median Home Sale Value	\$190,616	\$127,823	\$63,823	49.1%
New Residential Units	1,734	26.5 per 1,000 households		
Residential Rehab Activity	17.7 % of residential buildings			
Change in Crime ('02 - '06)	-30% (Violent)	-36% (Property)	-35% (Total)	
Incidents per 1,000 Persons ('06)	15.5 (Violent)	75.3 (Property)	90.8 (Total)	

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DrillDown Market Overview

BUSINESSES	Total #	Total Revenue	Total # Employees	Estimated Employee Annual Spending Potential
All Businesses	8,877	\$20.5 Billion	101,055	x \$2,787 / yr = \$281.6 Million in employee spending

RETAIL DEMAND	Estimated Revenue	Resident Expenditures	Estimated Leakage	Estimated Sq. Ft. Potential
All Retail	\$1.5 Billion	\$.9 Billion	-\$.6 Billion	
Apparel	\$91.7 Million	\$101.0 Million	\$9.3 Million	27,506
Grocery	\$386.1 Million	\$199.9 Million	-\$186.2 Million	0
Restaurants	\$237.6 Million	\$145.9 Million	-\$91.6 Million	0

GROCERY DEMAND	Total #	# per 10K HH	Average Distance	Total Expenditures	Total Leakage	Estimated Sq. Ft. Potential
All Grocers	85	12.3		\$199.9 Million		
Full Service Grocers Only	11	1.6	0.91 mi		-\$186.2 Million	0

FINANCIAL SERVICES	Total #	# per 10K HH	Average Distance
Banks & Credit Unions	53	7.7	
Banks Only	36	5.2	0.89 mi
Pawnshops, Checkcashers, Payday Lenders	70	10.1	1.0 mi
% of Households lacking credit histories = 17%			

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