



CDS Market Research | Spillette Consulting
An Alliance for Strategic Urban Consulting Services

*Helping public and private clients grow
great urban environments*



Alliance Services

CDS Market Research | Spillette Consulting provides an exceptional breadth and depth of consulting services for public and private clients facing questions of urban development.

The coupling of the market research capabilities of CDS with the strategic analysis and insight of Spillette Consulting creates a complementary and powerful set of services - robust data resources enhanced with intellectual rigor. Together, the team provides an objective and independent assessment of potential development patterns and urban growth concepts.

CDS | Spillette helps clients interpret and solve a variety of urban development issues:

- Identifying optimal market approaches and best practices for innovative types of private development
- Evaluating financial feasibility and fiscal impacts of public policies
- Finding strategies to maximize the impacts of transportation and other public investments
- Interpreting the applicability of emerging urban growth concepts and trends in diverse real estate markets
- Improving quality of life and placemaking through intelligent strategic planning
- Filling the specialized research, project planning, and strategic guidance needs of public agencies and nonprofit organizations

The two firms combine capabilities and efforts to give clients a singular edge in navigating the ever-more sophisticated and complex world of urban development.



Alliance Professional Capabilities

Market Research

Survey Marketing Research

Custom telephone and direct mail surveys designed to identify the wants and needs of customers and other influential individuals to develop the programs required to satisfy market expectations.

Market Information Collection and Summarization

Use of both independent information gathering and secondary sources to provide quantitative demographic, economic, and real estate data and qualitative assessments that underpin further analysis and decisionmaking.

Market Analysis

Demand Analysis and Projections

Development of methodology appropriate to available information and desired output to estimate and project quantitative levels of market demand over time for various land uses and real estate products.

Development Programming Recommendations

Use of quantitative and qualitative demand factors, informed with strategic insight, to recommend or project development programs for specific sites or larger districts.

Financial and Economic Analysis

Pro-Forma Financial Projections

Analysis of costs and revenues on a period-by-period basis to evaluate the financial feasibility of specific real estate projects.

Economic Analysis

Estimations and projections of potential land use, tax revenue and other public fiscal impacts from public policy initiatives and infrastructure investments.

Specialized Planning, Research and Strategic Evaluation

Research and Case Studies

Exploration of specific planning and development issues through review of existing research and gathering and compilation of information on experience from other locations to develop relevant and meaningful guidance for both the private and public sector.

Strategic Private Development and Public Policy Planning

Evaluation of potential directions for both the private sector and public agencies to obtain desired results in creating better developments, districts, towns, and cities by using both in-house professional expertise and the synthesis of other respected professional opinions.

CDS Market Research

*Years Of Effective Market Research
And Analysis Experience*

Senior Staff

R. Kent Dussair, President

Ray C. Lawrence, Principal Associate

Arelene Bradley, MAI, Senior Associate

Deane L. Sadler, Jr., Senior Associate

C. Keith Cruse, MAI, Senior Associate

CDS Market Research brings 34 years of experience in gathering essential data and analyzing markets for the real estate and economic development industries. We focus on the performance of independent market and economic analyses pertaining to planning, development feasibility and marketing. We address the critical issues, drill into the data and provide the basis for realistic, market supported business decisions. Probability of success is enhanced with solid information upon which to act - our studies become the foundation upon which short and long range plans are forged.

Seasoned senior staff members have a proven capability in the performance of market and economic research and analysis. Involvement as marketing consultants to private and public property owners, developers and investors, design consultants, financial institutions and public agencies has been extensive. These numerous and varied experiences have provided CDS staff members with an incisive understanding of the market dynamics and trends that illuminate the opportunities and influence site location, financial planning, design criteria, and public policies.

Spillette Consulting

*An Array Of Valuable Urban Planning
And Development Skills*

Steven R. Spillette, principal of Spillette Consulting, has produced a wide range of services and products for clients since 1990. Owing to a diverse work history that includes Economics Research Associates, a nationally known consulting firm, and the Uptown Houston District, one of Houston's most significant special districts, he amassed experience ranging from market and financial feasibility analysis to public policy and administration. In recent years as an independent consultant, he has accomplished a variety of specialized consulting services and research projects. He applies extensive urban development knowledge so that clients understand planning and development issues, receive meaningful data and analysis, find financially viable solutions, answer specialized research questions, and create strategic visions for properties and communities.

Academic Background

Mr. Spillette holds a B.A.S. in Economics and Applied Earth Sciences from Stanford University, a Masters of City Planning from the University of California at Berkeley, and an M.B.A. from Texas A&M University, where he also worked as a graduate assistant at the Real Estate Center.

Project Expertise

Alliance and Joint Projects

Waller Creek Flood Tunnel financial analysis review

A review of the market demand and development assumptions underlying the financial analysis of a proposed storm drainage project in downtown Austin, with development quantity and absorption forecasts of office, retail, residential, and hotel uses generated within a specified zone along Waller Creek. (2004)

Friendswood market study and Town Center evaluation

A series of market analyses for new office, retail, and industrial development that could improve the City of Friendswood's tax base, with specific attention to the issues of revitalizing the city's Main Street area and developing a high quality urban Town Center project. (2002)

ULI Main Street Corridor reports

Extensive research by Spillette Consulting to reveal key principles for encouraging high quality, pedestrian-friendly urban development along light rail lines that could be applied to the Main Street Corridor in Houston, coupled with an economic impact study by CDS of the successful application of these principles. (2002)

CDS Market Research Projects

Redevelopment / revitalization

- Comprehensive study of the Buffalo Bayou Corridor to determine the potential and timing of new development and redevelopment for a 30-year planning period. (2004)
- Market potential and evaluation of three alternatives for East End Industrial Park, an economic revitalization project funded by City of Houston Planning and Development Department. (2000)
- Advisor to special committee appointed by Central Houston, Inc. to evaluate various proposals to redevelop Fire Station No. 1 and Central Waterworks north of Buffalo Bayou. (2000)
- Focus groups comprised of residents of three loft projects to assist planning of The Rice (apartments, retail and entertainment) project in Downtown Houston. (1996)

Public investment impact analysis

- Sub-contractor to Parsons Brinckerhoff Quade & Douglass, Inc. on the Southeast / University / Hobby Corridor MIS Study to independently assess current and future land development patterns as part of alternatives analysis for a new METRO light rail alignment through urban core neighborhoods in Houston. (2003)
- Consultant to Central Houston, Inc., to determine of the types of development, capital investment and projected property tax revenues likely to occur as a direct result of the Toyota Center Sports Arena in downtown Houston. (2000)

continued



CDS Market Research Projects

Urban housing

- Large scale consumer surveys performed for the Houston Downtown Management District and the Midtown Redevelopment Authority to measure long-term housing potentials for Downtown / Midtown Houston. (1993-2003)
- Market feasibility and / or unit pricing / rental studies for fifteen high-rise, mid-rise apartment and loft style residential projects in the Downtown, Uptown, Midtown and Neartown areas of Houston. (1997-2004)

Special districts

- Surveys and tracking analysis to aid the Greater Greenspoint Management District in understanding how various district-sponsored programs; retail, business services, and housing; and light rail and other transportation investments are perceived by area residents and employees (1994-2003)
- Independent analysis of residential and commercial development potential that would be catalyzed by creation of a TIRZ around the proposed Hardy Place mixed-use development near downtown Houston. (2002)
- Evaluation of existing land uses and development patterns in and around Sugar Land, Texas to support creation of a TIRZ and development of Sugar Land Town Square. (2000)
- Market area assessment of potential infill land uses that would determine the feasibility of creating TIRZs areas including Memorial Heights, Sharpstown, and Gulfgate in Houston. (1997-2003)

Large-Scale Real Estate Development

- Land utilization studies addressing conceptual planning and demand measurements for components of various masterplanned communities including First Colony, The Woodlands, Kingwood, Sienna Plantation, Silverlake and others. (1971-2004)
- Market planning and project feasibility studies for targeting industrial and commercial users, establishing demand and recommending timing of business / industrial parks development for Tomball, League City, Pasadena, Palestine, Bryan / College Station and Pearland. (1996 - 2004)
- Long-range strategic planning study for the purpose of identifying preferred and market-supportable commercial users to be targeted by the Mills Corporation for peripheral land use and development surrounding the Katy Mills Mall property. (1998)



Spillette Consulting Projects

Community planning

- Primary authorship of the Downtown Development Framework reports to summarize and advocate the twenty-year vision for downtown Houston (2004)
- Advisory services and administrative coordination to the Westchase District for preparation of a long range comprehensive plan and selection of a planning consultant (ongoing)
- Analysis and recommendations identifying the financial and fiscal strategies for implementing a plan to redevelop the Main Street area of Friendswood, Texas into a Town Center (2004)
- Comparative assessment of the economic development potential of three proposed high-capacity transit alignments in Houston's North-Hardy Corridor as part of the corridor's alternatives analysis for the Metropolitan Transit Authority of Harris County (METRO) (2003)
- Assistance with creation of a Capital Improvement Program for the Uptown Houston District and preparation of a board of directors workshop (2003)

Special districts and economic development policy

- Strategic assistance and financial analysis to the Energy Corridor Management District regarding expansion of its service area boundaries (ongoing)
- Research and financial analysis of potential incentives to encourage residential and retail expansion in downtown Houston (2004)
- Evaluation of the fiscal and planning impacts of three Tax Increment Reinvestment Zones (TIRZs) on the City of Galveston, Texas (2003)
- Preparation of a proposal to the City of Galveston for the creation of a neighborhood empowerment zone to facilitate development of a new industrial facility (2002)

Specialized research, reports, and technical assistance

- Assistance in drafting and coordinating the production of a vision plan document for Uptown Houston (ongoing)
- Compilation and analysis of recent citywide and neighborhood planning efforts for the Compendium of Plans, prepared for the Blueprint Houston civic initiative (2003)
- Assistance in preparing the annual operating and debt service budget of the Uptown Houston District, including the projection of District assessed values (2003 - 2004)
- Preparation of a proposal to the Houston-Galveston Area Council that resulted in initiation of a midday shuttle service in Uptown Houston (2002)



CDS

Market Research

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SPILLETTE URBAN PLANNING
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