



# RETAIL TRADE AREA GAP/OPPORTUNITY ANALYSIS

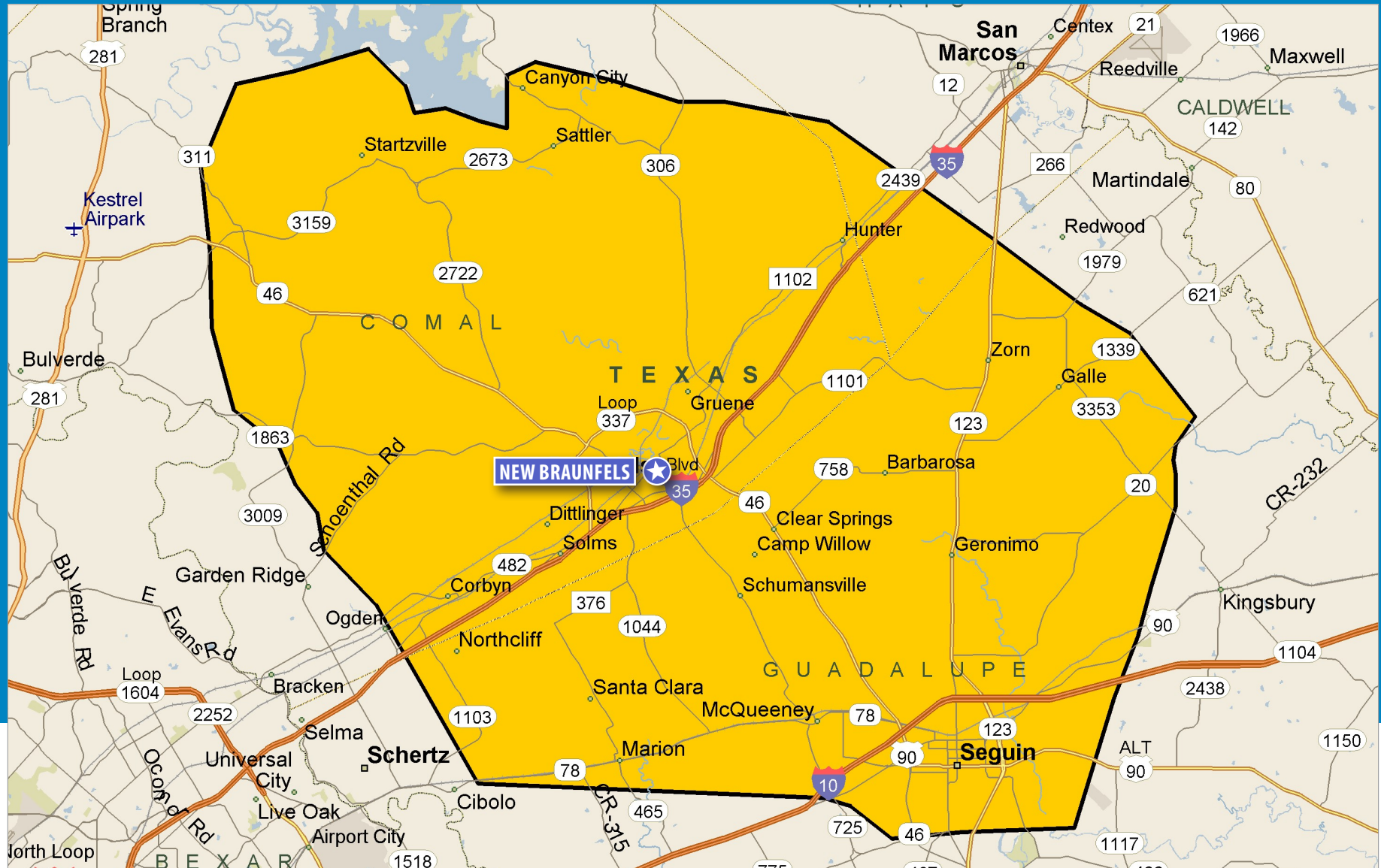
New Braunfels, Texas



Prepared for  
New Braunfels EDC  
September 2015



## Retail Trade Area New Braunfels, Texas



### Contact Information

**Holly Covington, Marketing and Research Director**  
New Braunfels EDC  
P. O. Box 311417  
New Braunfels, Texas 78131-1417

Phone 830.608.2817  
Fax 830.625.7918  
holly@innewbraunfels.com  
www.businessinnewbraunfels.com

## Retail Trade Area | Gap/Opportunity Analysis Summary

### New Braunfels, Texas

SECTOR	DESCRIPTION	POTENTIAL SALES	EST. ACTUAL SALES	SURPLUS/LEAKAGE	% SURPLUS
	<b>Total Retail Sales Incl Eating and Drinking Places</b>	<b>2,830,043,379</b>	<b>1,781,377,089</b>	<b>-1,048,666,290</b>	<b>-37%</b>
441	Motor Vehicle and Parts Dealers	529,306,992	327,057,731	-202,249,261	-38%
4411	Automotive Dealers	441,746,156	260,742,788	-181,003,368	-41%
4412	Other Motor Vehicle Dealers	46,479,441	51,961,903	5,482,462	12%
4413	Automotive Parts/Accsrs, Tire Stores	41,081,395	14,353,040	-26,728,355	-65%
442	Furniture and Home Furnishings Stores	54,725,313	81,937,563	27,212,250	50%
4421	Furniture Stores	28,998,411	36,378,908	7,380,497	25%
4422	Home Furnishing Stores	25,726,902	45,558,655	19,831,753	77%
443	Electronics and Appliance Stores	49,896,672	18,396,031	-31,500,641	-63%
44311	Appliances, TVs, Electronics Stores	38,668,322	18,396,031	-20,272,291	-52%
443111	Household Appliances Stores	6,827,025	0	-6,827,025	-100%
443112	Radio, Television, Electronics Stores	31,841,297	18,396,031	-13,445,266	-42%
44312	Computer and Software Stores	10,097,568	0	-10,097,568	-100%
44313	Camera and Photographic Equipment Stores	1,130,781	0	-1,130,781	-100%
444	Building Material, Garden Equip Stores	291,986,057	353,092,169	61,106,112	21%
4441	Building Material and Supply Dealers	250,562,479	344,533,282	93,970,803	38%
44411	Home Centers	101,560,135	130,537,850	28,977,715	29%
44412	Paint and Wallpaper Stores	4,266,192	899,132	-3,367,060	-79%
44413	Hardware Stores	24,826,524	7,242,164	-17,584,360	-71%
44419	Other Building Materials Dealers	119,909,627	205,854,136	85,944,509	72%
4442	Lawn, Garden Equipment, Supplies Stores	41,423,578	8,558,887	-32,864,691	-79%
44421	Outdoor Power Equipment Stores	11,971,260	529,801	-11,441,459	-96%
44422	Nursery and Garden Centers	29,452,318	8,029,086	-21,423,232	-73%

## Retail Trade Area | Gap/Opportunity Analysis Summary

### New Braunfels, Texas

SECTOR	DESCRIPTION	POTENTIAL SALES	EST. ACTUAL SALES	SURPLUS/LEAKAGE	% SURPLUS
445	Food and Beverage Stores	350,559,818	129,690,944	-220,868,874	-63%
4451	Grocery Stores	228,222,849	120,752,340	-107,470,509	-47%
44511	Supermarkets, Grocery (Ex Conv) Stores	213,555,413	117,511,168	-96,044,245	-45%
44512	Convenience Stores	14,667,436	3,241,172	-11,426,264	-78%
4452	Specialty Food Stores	27,732,633	4,442,766	-23,289,867	-84%
4453	Beer, Wine and Liquor Stores	94,604,336	4,495,838	-90,108,498	-95%
446	Health and Personal Care Stores	165,930,378	65,398,227	-100,532,151	-61%
44611	Pharmacies and Drug Stores	133,123,256	61,914,085	-71,209,171	-53%
44612	Cosmetics, Beauty Supplies, Perfume Stores	11,678,045	973,086	-10,704,959	-92%
44613	Optical Goods Stores	6,350,015	1,187,372	-5,162,643	-81%
44619	Other Health and Personal Care Stores	14,779,062	1,323,684	-13,455,378	-91%
447	Gasoline Stations	270,391,231	260,652,241	-9,738,990	-4%
44711	Gasoline Stations With Conv Stores	196,453,076	199,732,931	3,279,855	2%
44719	Other Gasoline Stations	73,938,155	60,919,310	-13,018,845	-18%
448	Clothing and Clothing Accessories Stores	127,436,202	41,566,928	-85,869,274	-67%
4481	Clothing Stores	67,602,385	38,374,364	-29,228,021	-43%
44811	Men's Clothing Stores	3,239,776	97,637	-3,142,139	-97%
44812	Women's Clothing Stores	14,953,130	1,348,338	-13,604,792	-91%
44813	Childrens, Infants Clothing Stores	4,223,088	225,898	-3,997,190	-95%
44814	Family Clothing Stores	36,425,446	30,691,203	-5,734,243	-16%
44815	Clothing Accessories Stores	2,933,698	4,101,419	1,167,721	40%
44819	Other Clothing Stores	5,827,246	1,909,869	-3,917,377	-67%
4482	Shoe Stores	10,162,902	1,186,201	-8,976,701	-88%
4483	Jewelry, Luggage, Leather Goods Stores	49,670,915	2,006,363	-47,664,552	-96%
44831	Jewelry Stores	44,594,546	2,006,363	-42,588,183	-96%
44832	Luggage and Leather Goods Stores	5,076,369	0	-5,076,369	-100%

## Retail Trade Area | Gap/Opportunity Analysis Summary

### New Braunfels, Texas

SECTOR	DESCRIPTION	POTENTIAL SALES	EST. ACTUAL SALES	SURPLUS/LEAKAGE	% SURPLUS
451	Sporting Goods, Hobby, Book, Music Stores	48,301,924	27,892,238	-20,409,686	-42%
4511	Sportng Goods, Hobby, Musical Inst Stores	41,975,311	27,009,267	-14,966,044	-36%
45111	Sporting Goods Stores	21,514,685	13,852,432	-7,662,253	-36%
45112	Hobby, Toys and Games Stores	12,328,773	12,453,058	124,285	1%
45113	Sew/Needlework/Piece Goods Stores	3,703,803	228,967	-3,474,836	-94%
45114	Musical Instrument and Supplies Stores	4,428,050	474,810	-3,953,240	-89%
4512	Book, Periodical and Music Stores	6,326,613	882,971	-5,443,642	-86%
45121	Book Stores and News Dealers	5,374,518	882,971	-4,491,547	-84%
451211	Book Stores	4,717,603	882,971	-3,834,632	-81%
451212	News Dealers and Newsstands	656,915	0	-656,915	-100%
45122	Prerecorded Tapes, CDs, Record Stores	952,096	0	-952,096	-100%
452	General Merchandise Stores	322,984,237	241,642,742	-81,341,495	-25%
4521	Department Stores Excl Leased Depts	137,918,364	14,975,790	-122,942,574	-89%
4529	Other General Merchandise Stores	185,065,874	226,666,952	41,601,078	22%
453	Miscellaneous Store Retailers	74,116,293	29,673,697	-44,442,596	-60%
4531	Florists	2,829,576	605,427	-2,224,149	-79%
4532	Office Supplies, Stationery, Gift Stores	34,881,015	19,843,219	-15,037,796	-43%
45321	Office Supplies and Stationery Stores	16,851,809	13,860,212	-2,991,597	-18%
45322	Gift, Novelty and Souvenir Stores	18,029,206	5,983,007	-12,046,199	-67%
4533	Used Merchandise Stores	5,460,412	1,857,610	-3,602,802	-66%
4539	Other Miscellaneous Store Retailers	30,945,290	7,367,441	-23,577,849	-76%
454	Non-Store Retailers	243,127,971	2,252,847	-240,875,124	-99%
722	Foodservice and Drinking Places	301,280,291	202,123,731	-99,156,560	-33%
7221	Full-Service Restaurants	136,523,190	93,982,216	-42,540,974	-31%
7222	Limited-Service Eating Places	119,853,628	83,983,997	-35,869,631	-30%
7223	Special Foodservices	32,915,821	15,603,758	-17,312,063	-53%
7224	Drinking Places -Alcoholic Beverages	11,987,652	8,553,760	-3,433,892	-29%



C. Kelly Cofer  
President & CEO  
The Retail Coach, LLC

## About The Retail Coach

The Retail Coach, LLC, is a national retail analytics and locational intelligence firm that specializes in all aspects of retail market analyses and recruitment, from “macro to micro” trade area assessment to actively recruiting retailers on behalf of our clients.

Through its unique Retail:360 process, The Retail Coach offers a dynamic system of products and services that better enable communities to maximize their retail development potential.

## Retail:360 Process

Providing more than simple data reports of psychographic and demographic trends, The Retail Coach goes well beyond other retail consulting and market research firms’ offerings by combining current national and statewide demographics and trend data with real-world, “on-the-ground” data gathered through extensive visits within our clients’ communities.

Every community is different, and there is no “one size fits all” retail recruitment solution. Compiling the gathered data into client-tailored information packets that are uniquely designed for, and targeted to, specific retailers and restaurants who meet the community’s needs helps assure our clients that they are receiving the latest and best information for their retail recruitment efforts — all with personal service and coaching guidance that continues beyond the initial project scope and timeline.

Our Retail:360 process assures that communities get timely, accurate and relevant information. Translating that data into the information that retailers need and seek assures our clients even better possibilities for tremendous retail growth and success.

**The Retail Coach -  
It’s not about data. It’s about your success.**

The Retail Coach, LLC | P. O. Box 7272 | Tupelo, Mississippi 38802  
tel 800.851.0962 | fax 662.844.2738 | e-mail [info@theretailcoach.net](mailto:info@theretailcoach.net) | web [www.theretailcoach.net](http://www.theretailcoach.net)



## Acknowledgements

The observations, conclusions and recommendations contained in this study are solely those of The Retail Coach, LLC and should not be construed to represent the opinions of others, including its clients, or any other entity prior to such entity's express approval of this study.

Sources used in completing this study include: infoUSA™, Applied Geographic Solutions, Nielsen 2014/2015, ESRI 2015, U.S. Census Bureau, Economy.com, Spatial Insights Inc., Urban Land Institute, CensusViewer.com, International Council of Shopping Centers, and/or U.S. Bureau of Labor and Statistics.

To better represent current data, where applicable, portions of estimated actual sales may be calculated using an average sales per square foot model.

Mapping data is provided by MapInfo, Nielsen, ESRI and/or Microsoft Corporation.

All information furnished is from sources deemed reliable and is submitted subject to errors, omissions, change of terms and/or conditions.