



The**Retail**Coach.®

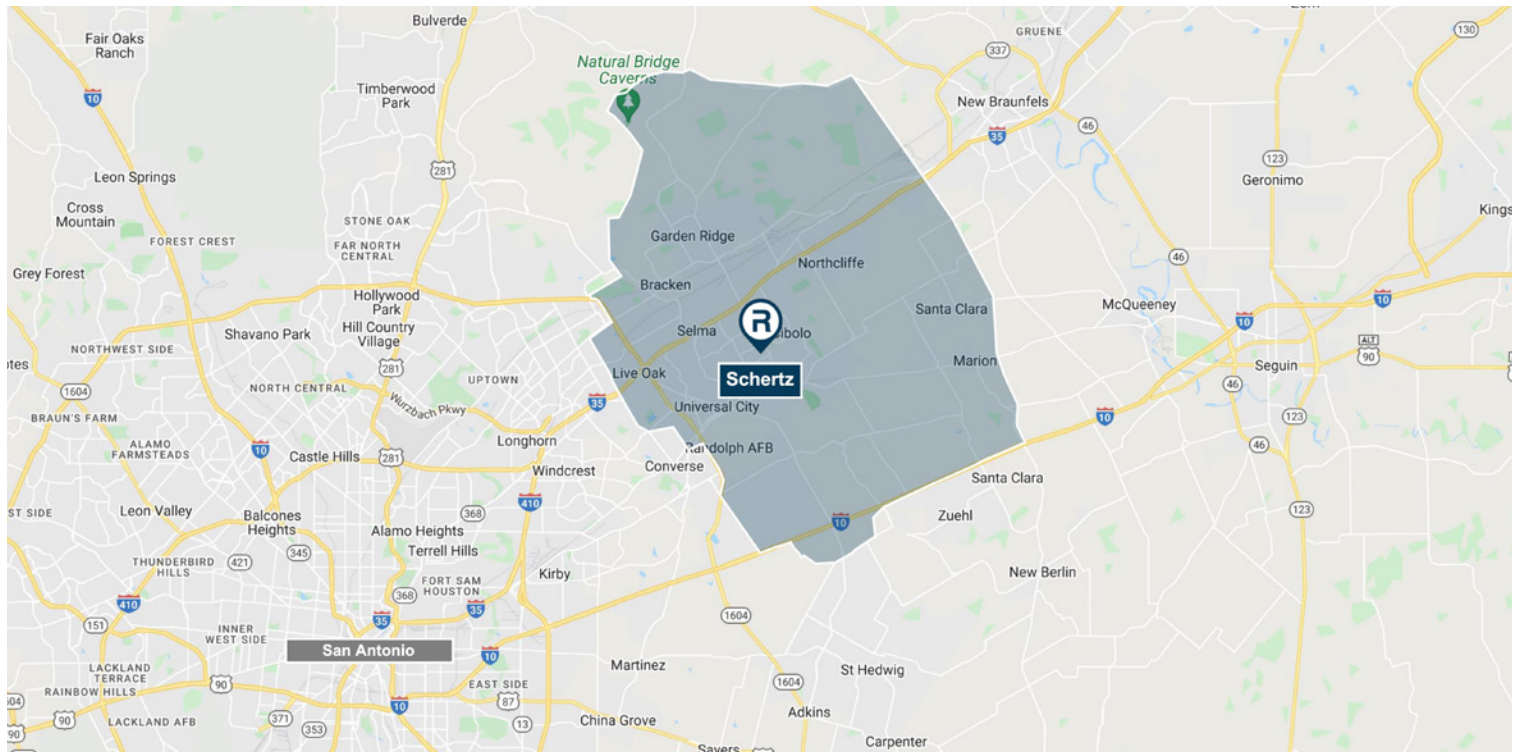
Primary Retail Trade Area Retail Demand Outlook

SCHERTZ, TEXAS

Prepared for Schertz Economic Development Corporation (SEDC)
November 2023

Primary Retail Trade Area • Demographic Snapshot

Schertz, Texas



Population

| | | | |
|------|---------|---------------|--------|
| 2010 | 102,623 | 0 - 9 Years | 12.54% |
| 2022 | 142,541 | 10 - 17 Years | 11.32% |
| 2027 | 152,601 | 18 - 24 Years | 8.86% |

Randolph Air Force Base Population

| | | | |
|------|--------|---------------|--------|
| 2022 | 12,500 | 25 - 34 Years | 13.11% |
| | | 35 - 44 Years | 14.35% |
| | | 45 - 54 Years | 13.76% |

Educational Attainment (%)

| | | | |
|---------------------------------|--------|---------------|--------|
| Graduate or Professional Degree | 13.53% | 55 - 64 Years | 12.32% |
| Bachelors Degree | 22.53% | 65 and Older | 13.74% |
| Associate Degree | 11.96% | Median Age | 37.95 |
| Some College | 22.18% | Average Age | 38.26 |
| High School Graduate (GED) | 23.67% | | |
| Some High School, No Degree | 3.95% | | |
| Less than 9th Grade | 2.18% | | |

Income

| | |
|------------|-----------|
| Average HH | \$112,358 |
| Median HH | \$92,796 |
| Per Capita | \$40,716 |

Age

| | |
|---------------|--------|
| 0 - 9 Years | 12.54% |
| 10 - 17 Years | 11.32% |
| 18 - 24 Years | 8.86% |
| 25 - 34 Years | 13.11% |
| 35 - 44 Years | 14.35% |
| 45 - 54 Years | 13.76% |
| 55 - 64 Years | 12.32% |
| 65 and Older | 13.74% |
| Median Age | 37.95 |
| Average Age | 38.26 |

Race Distribution (%)

| | |
|--------------------------|--------|
| White | 69.02% |
| Black/African American | 13.25% |
| American Indian/Alaskan | 0.64% |
| Asian | 3.32% |
| Native Hawaiian/Islander | 0.29% |
| Other Race | 8.16% |
| Two or More Races | 5.32% |
| Hispanic | 35.39% |

SCHERTZ

ECONOMIC DEVELOPMENT CORPORATION

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Primary Retail Trade Area • Retail Demand Outlook

Schertz, Texas

| NAICS | DESCRIPTION | 2022 DEMAND | 2027 DEMAND | GROWTH | CAGR (%)* |
|--------------------|--|------------------------|------------------------|----------------------|--------------|
| 44, 45, 722 | Total retail trade including food and drinking places | \$1,531,502,619 | \$1,774,141,752 | \$242,639,133 | 2.99% |
| 441 | Motor vehicle and parts dealers | \$344,813,923 | \$401,081,221 | \$56,267,298 | 3.07% |
| 4411 | Automobile dealers | \$305,120,160 | \$353,296,714 | \$48,176,554 | 2.98% |
| 4412 | Other motor vehicle dealers | \$15,735,356 | \$18,618,187 | \$2,882,831 | 3.42% |
| 4413 | Automotive parts, accessories, and tire stores | \$23,958,408 | \$29,166,320 | \$5,207,913 | 4.01% |
| 442 | Furniture and home furnishings stores | \$15,048,034 | \$16,634,992 | \$1,586,959 | 2.03% |
| 4421 | Furniture stores | \$9,951,165 | \$10,995,949 | \$1,044,783 | 2.02% |
| 4422 | Home furnishings stores | \$5,096,869 | \$5,639,044 | \$542,175 | 2.04% |
| 443 | Electronics and appliance stores | \$26,161,473 | \$29,720,983 | \$3,559,509 | 2.58% |
| 443141 | Household appliance stores | \$7,493,269 | \$8,836,570 | \$1,343,302 | 3.35% |
| 443142 | Electronics stores | \$18,668,205 | \$20,884,412 | \$2,216,208 | 2.27% |
| 444 | Building material and garden equipment and supplies dealers | \$83,322,001 | \$98,994,493 | \$15,672,492 | 3.51% |
| 4441 | Building material and supplies dealers | \$73,028,301 | \$86,906,292 | \$13,877,991 | 3.54% |
| 44411 | Home centers | \$41,874,175 | \$49,845,221 | \$7,971,047 | 3.55% |
| 44412 | Paint and wallpaper stores | \$2,549,403 | \$3,037,414 | \$488,011 | 3.57% |
| 44413 | Hardware stores | \$7,007,623 | \$8,249,430 | \$1,241,808 | 3.32% |
| 44419 | Other building material dealers | \$21,597,100 | \$25,774,226 | \$4,177,126 | 3.60% |
| 4442 | Lawn and garden equipment and supplies stores | \$10,293,700 | \$12,088,201 | \$1,794,501 | 3.27% |
| 44421 | Outdoor power equipment stores | \$1,895,041 | \$2,231,950 | \$336,909 | 3.33% |
| 44422 | Nursery, garden center, and farm supply stores | \$8,398,659 | \$9,856,252 | \$1,457,593 | 3.25% |
| 445 | Food and beverage stores | \$213,131,534 | \$244,824,171 | \$31,692,637 | 2.81% |
| 4451 | Grocery stores | \$196,688,878 | \$225,719,770 | \$29,030,892 | 2.79% |
| 44511 | Supermarkets and other grocery (except convenience) stores | \$188,712,631 | \$216,515,984 | \$27,803,353 | 2.79% |
| 44512 | Convenience stores | \$7,976,247 | \$9,203,786 | \$1,227,539 | 2.90% |
| 4452 | Specialty food stores | \$6,116,608 | \$6,993,103 | \$876,495 | 2.71% |
| 4453 | Beer, wine, and liquor stores | \$10,326,048 | \$12,111,298 | \$1,785,250 | 3.24% |
| 446 | Health and personal care stores | \$35,699,623 | \$42,452,879 | \$6,753,255 | 3.53% |
| 44611 | Pharmacies and drug stores | \$27,721,778 | \$33,067,989 | \$5,346,211 | 3.59% |
| 44612 | Cosmetics, beauty supplies, and perfume stores | \$1,465,459 | \$1,774,679 | \$309,221 | 3.90% |
| 44613 | Optical goods stores | \$5,169,521 | \$5,999,972 | \$830,452 | 3.02% |
| 44619 | Other health and personal care stores | \$1,342,867 | \$1,610,238 | \$267,372 | 3.70% |
| 447 | Gasoline stations | \$131,354,776 | \$158,765,301 | \$27,410,525 | 3.86% |

Primary Retail Trade Area • Retail Demand Outlook

Schertz, Texas

| NAICS | DESCRIPTION | 2022 DEMAND | 2027 DEMAND | GROWTH | CAGR (%)* |
|--------|--|---------------|---------------|--------------|-----------|
| 448 | Clothing and clothing accessories stores | \$43,012,500 | \$45,081,237 | \$2,068,737 | 0.94% |
| 4481 | Clothing stores | \$29,300,269 | \$30,710,172 | \$1,409,903 | 0.94% |
| 44811 | Men's clothing stores | \$1,320,655 | \$1,390,983 | \$70,327 | 1.04% |
| 44812 | Women's clothing stores | \$4,684,090 | \$4,855,322 | \$171,233 | 0.72% |
| 44813 | Children's and infants' clothing stores | \$1,817,824 | \$1,929,639 | \$111,815 | 1.20% |
| 44814 | Family clothing stores | \$17,897,948 | \$18,818,366 | \$920,418 | 1.01% |
| 44815 | Clothing accessories stores | \$1,147,507 | \$1,194,691 | \$47,184 | 0.81% |
| 44819 | Other clothing stores | \$2,432,246 | \$2,521,171 | \$88,925 | 0.72% |
| 4482 | Shoe stores | \$8,221,906 | \$8,654,471 | \$432,565 | 1.03% |
| 4483 | Jewelry, luggage, and leather goods stores | \$5,490,324 | \$5,716,593 | \$226,269 | 0.81% |
| 44831 | Jewelry stores | \$2,087,575 | \$2,153,562 | \$65,987 | 0.62% |
| 44832 | Luggage and leather goods stores | \$3,402,750 | \$3,563,032 | \$160,282 | 0.92% |
| 451 | Sporting goods, hobby, musical instrument, and book stores | \$18,869,999 | \$21,088,951 | \$2,218,952 | 2.25% |
| 4511 | Sporting goods, hobby, and musical instrument stores | \$14,234,671 | \$15,871,732 | \$1,637,061 | 2.20% |
| 45111 | Sporting goods stores | \$8,974,886 | \$10,258,387 | \$1,283,501 | 2.71% |
| 45112 | Hobby, toy, and game stores | \$2,857,850 | \$3,010,204 | \$152,354 | 1.04% |
| 45113 | Sewing, needlework, and piece goods stores | \$377,566 | \$391,895 | \$14,329 | 0.75% |
| 45114 | Musical instrument and supplies stores | \$2,024,370 | \$2,211,247 | \$186,877 | 1.78% |
| 4512 | Book stores and news dealers | \$4,635,328 | \$5,217,219 | \$581,891 | 2.39% |
| 452 | General merchandise stores | \$182,130,138 | \$207,079,202 | \$24,949,063 | 2.60% |
| 4522 | Department stores | \$19,642,847 | \$21,568,425 | \$1,925,578 | 1.89% |
| 4523 | Other general merchandise stores | \$162,487,291 | \$185,510,776 | \$23,023,485 | 2.69% |
| 453 | Miscellaneous store retailers | \$29,076,163 | \$32,737,815 | \$3,661,651 | 2.40% |
| 4531 | Florists | \$931,306 | \$1,093,231 | \$161,925 | 3.26% |
| 4532 | Office supplies, stationery, and gift stores | \$5,482,841 | \$6,119,444 | \$636,603 | 2.22% |
| 45321 | Office supplies and stationery stores | \$2,116,415 | \$2,396,414 | \$279,999 | 2.52% |
| 45322 | Gift, novelty, and souvenir stores | \$3,366,426 | \$3,723,030 | \$356,604 | 2.03% |
| 4533 | Used merchandise stores | \$5,137,644 | \$5,665,678 | \$528,034 | 1.98% |
| 4539 | Other miscellaneous store retailers | \$17,524,373 | \$19,859,461 | \$2,335,089 | 2.53% |
| 45391 | Pet and pet supplies stores | \$7,201,376 | \$8,075,341 | \$873,965 | 2.32% |
| 45399 | All other miscellaneous store retailers | \$10,322,997 | \$11,784,120 | \$1,461,124 | 2.68% |
| 454 | Non-store retailers | \$196,640,562 | \$222,614,373 | \$25,973,810 | 2.51% |
| 722 | Food services and drinking places | \$212,241,892 | \$253,066,136 | \$40,824,244 | 3.58% |
| 7223 | Special food services | \$17,225,566 | \$20,537,362 | \$3,311,796 | 3.58% |
| 7224 | Drinking places (alcoholic beverages) | \$4,582,083 | \$5,460,584 | \$878,501 | 3.57% |
| 7225 | Restaurants and other eating places | \$190,434,243 | \$227,068,190 | \$36,633,947 | 3.58% |
| 722511 | Full-service restaurants | \$91,672,218 | \$109,311,524 | \$17,639,306 | 3.58% |
| 722513 | Limited-service restaurants | \$83,821,730 | \$99,956,456 | \$16,134,726 | 3.58% |
| 722514 | Cafeterias, grill buffets, and buffets | \$2,136,892 | \$2,548,353 | \$411,461 | 3.58% |
| 722515 | Snack and nonalcoholic beverage bars | \$12,803,404 | \$15,251,857 | \$2,448,453 | 3.56% |

About The Retail Coach®

The Retail Coach is a national retail recruitment and development firm that combines strategy, technology, and creative expertise to develop and deliver high-impact retail recruitment and development plans to local governments, chambers of commerce, economic development organizations and private developers.

Through its unique Retail360® 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" information gathered through extensive visits to 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 help assure our clients that they are receiving the latest and best information for targeted 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**RetailCoach**.®

ACKNOWLEDGMENTS

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.

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

Sources used in completing this study include: infoUSA™, Applied Geographic Solutions, Environics Analytics, ESRI, U.S. Census Bureau, Economy.com, Placer.AI, 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 Google, Nielsen, ESRI and/or Microsoft Corporation.

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* Compound annual growth rate (CAGR) is the geometric progression ratio that provides a constant rate of return over the time period. CAGR dampens the effect of volatility of periodic growth.