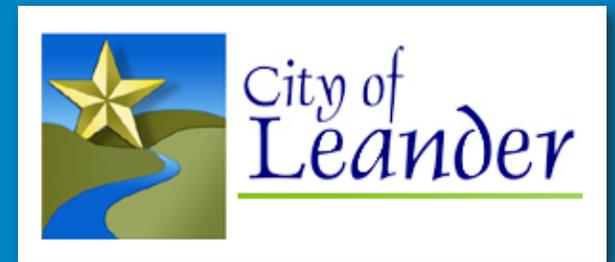




# PRIMARY RETAIL TRADE AREA GAP/OPPORTUNITY ANALYSIS

Leander, Texas

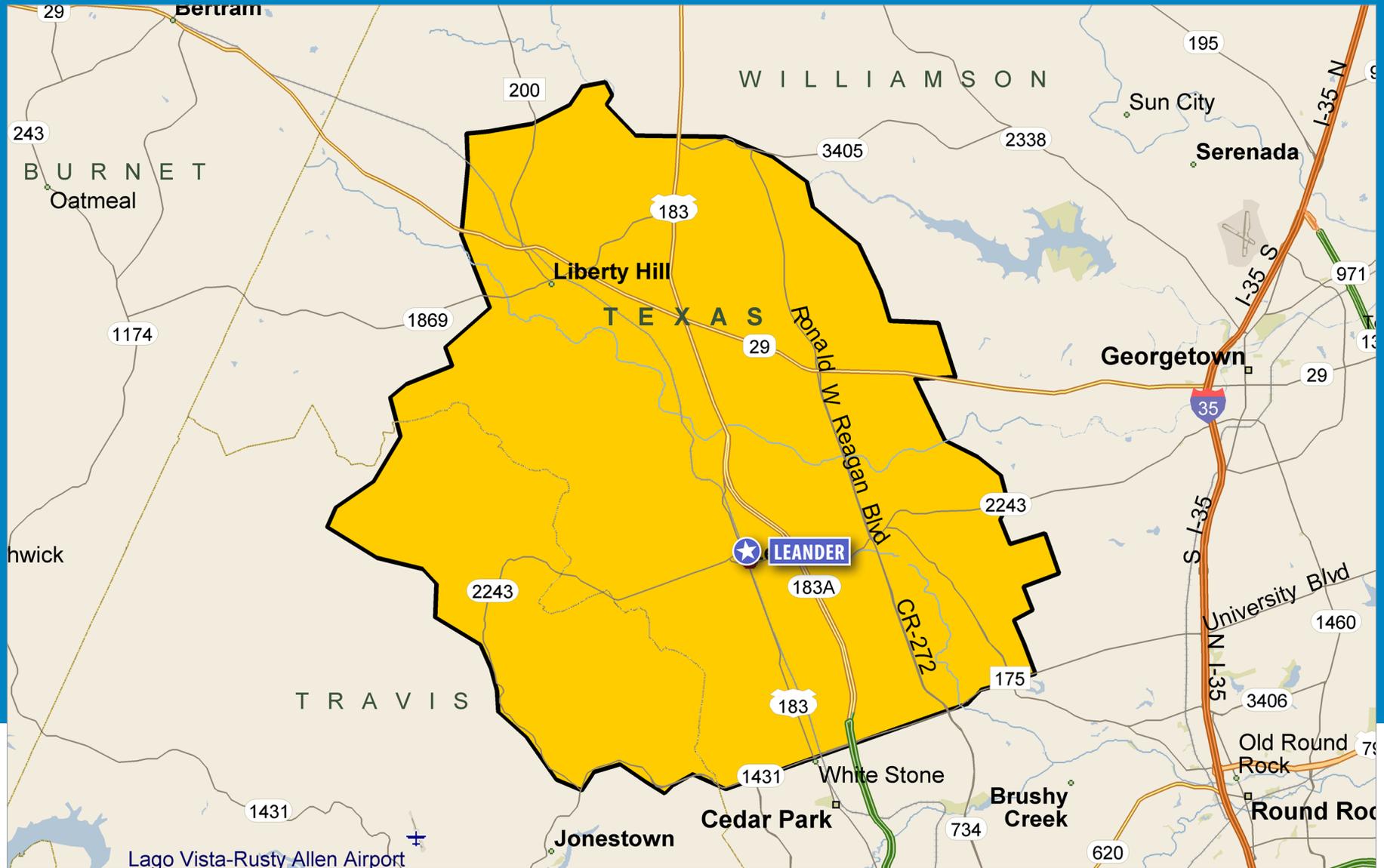


Prepared for  
City of Leander  
February 2015

 **TheRetailCoach®**

# Primary Retail Trade Area

Leander, Texas



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## Primary Retail Trade Area | Gap/Opportunity Analysis Summary

Leander, Texas

SECTOR	DESCRIPTION	POTENTIAL SALES	EST. ACTUAL SALES	SURPLUS/LEAKAGE	% SURPLUS
	<b>Total Retail Sales Incl Eating and Drinking Places</b>	<b>1,266,279,204</b>	<b>254,321,192</b>	<b>(1,011,958,012)</b>	<b>-80%</b>
441	Motor Vehicle and Parts Dealers	241,173,262	16,927,484	(224,245,778)	-93%
4411	Automotive Dealers	204,080,076	6,136,229	(197,943,847)	-97%
4412	Other Motor Vehicle Dealers	18,500,210	3,763,189	(14,737,021)	-80%
4413	Automotive Parts/Accsrs, Tire Stores	18,592,975	7,028,066	(11,564,909)	-62%
442	Furniture and Home Furnishings Stores	26,084,832	1,028,017	(25,056,815)	-96%
4421	Furniture Stores	14,223,519	781,081	(13,442,438)	-95%
4422	Home Furnishing Stores	11,861,313	246,936	(11,614,377)	-98%
443	Electronics and Appliance Stores	23,619,741	595,314	(23,024,427)	-97%
44311	Appliances, TVs, Electronics Stores	17,119,396	554,557	(16,564,839)	-97%
443111	Household Appliances Stores	3,167,353	1,939	(3,165,414)	-100%
443112	Radio, Television, Electronics Stores	13,952,043	552,618	(13,399,425)	-96%
44312	Computer and Software Stores	5,743,107	40,757	(5,702,350)	-99%
44313	Camera and Photographic Equipment Stores	757,238	0	(757,238)	-100%
444	Building Material, Garden Equip Stores	131,847,965	45,843,522	(86,004,443)	-65%
4441	Building Material and Supply Dealers	113,577,991	44,062,075	(69,515,916)	-61%
44411	Home Centers	45,855,729	43,133,846	(2,721,883)	-6%
44412	Paint and Wallpaper Stores	1,947,153	0	(1,947,153)	-100%
44413	Hardware Stores	11,259,557	0	(11,259,557)	-100%
44419	Other Building Materials Dealers	54,515,552	928,229	(53,587,323)	-98%
4442	Lawn, Garden Equipment, Supplies Stores	18,269,974	1,781,447	(16,488,527)	-90%
44421	Outdoor Power Equipment Stores	5,238,329	536	(5,237,793)	-100%
44422	Nursery and Garden Centers	13,031,645	1,780,911	(11,250,734)	-86%

## Primary Retail Trade Area | Gap/Opportunity Analysis Summary

Leander, Texas

SECTOR	DESCRIPTION	POTENTIAL SALES	EST. ACTUAL SALES	SURPLUS/LEAKAGE	% SURPLUS
445	Food and Beverage Stores	148,325,128	65,208,109	(83,117,019)	-56%
4451	Grocery Stores	98,025,846	64,019,559	(34,006,287)	-35%
44511	Supermarkets, Grocery (Ex Conv) Stores	91,697,269	63,306,989	(28,390,280)	-31%
44512	Convenience Stores	6,328,576	712,570	(5,616,006)	-89%
4452	Specialty Food Stores	12,006,135	1,035,044	(10,971,091)	-91%
4453	Beer, Wine and Liquor Stores	38,293,147	153,506	(38,139,641)	-100%
446	Health and Personal Care Stores	65,544,956	21,843,589	(43,701,367)	-67%
44611	Pharmacies and Drug Stores	52,152,841	21,092,545	(31,060,296)	-60%
44612	Cosmetics, Beauty Supplies, Perfume Stores	4,601,420	145,313	(4,456,107)	-97%
44613	Optical Goods Stores	2,925,184	445,608	(2,479,576)	-85%
44619	Other Health and Personal Care Stores	5,865,512	160,123	(5,705,389)	-97%
447	Gasoline Stations	122,027,610	17,073,780	(104,953,830)	-86%
44711	Gasoline Stations With Conv Stores	88,372,734	16,639,682	(71,733,052)	-81%
44719	Other Gasoline Stations	33,654,876	434,098	(33,220,778)	-99%
448	Clothing and Clothing Accessories Stores	61,220,770	19,324,073	(41,896,697)	-68%
4481	Clothing Stores	34,056,202	16,122,322	(17,933,880)	-53%
44811	Men's Clothing Stores	1,664,663	3,748	(1,660,915)	-100%
44812	Women's Clothing Stores	8,058,764	626,448	(7,432,316)	-92%
44813	Childrens, Infants Clothing Stores	2,257,519	30,851	(2,226,668)	-99%
44814	Family Clothing Stores	17,764,559	15,280,444	(2,484,115)	-14%
44815	Clothing Accessories Stores	1,454,600	121,280	(1,333,320)	-92%
44819	Other Clothing Stores	2,856,097	59,551	(2,796,546)	-98%
4482	Shoe Stores	4,942,619	24,851	(4,917,768)	-99%
4483	Jewelry, Luggage, Leather Goods Stores	22,221,949	3,176,900	(19,045,049)	-86%
44831	Jewelry Stores	19,795,612	3,176,900	(16,618,712)	-84%
44832	Luggage and Leather Goods Stores	2,426,337	0	(2,426,337)	-100%

## Primary Retail Trade Area | Gap/Opportunity Analysis Summary

Leander, Texas

SECTOR	DESCRIPTION	POTENTIAL SALES	EST. ACTUAL SALES	SURPLUS/LEAKAGE	% SURPLUS
451	Sporting Goods, Hobby, Book, Music Stores	25,344,038	504,895	(24,839,143)	-98%
4511	Sportng Goods, Hobby, Musical Inst Stores	21,921,187	498,727	(21,422,460)	-98%
45111	Sporting Goods Stores	11,730,271	162,283	(11,567,988)	-99%
45112	Hobby, Toys and Games Stores	6,018,619	336,444	(5,682,175)	-94%
45113	Sew/Needlework/Piece Goods Stores	1,960,380	0	(1,960,380)	-100%
45114	Musical Instrument and Supplies Stores	2,211,916	0	(2,211,916)	-100%
4512	Book, Periodical and Music Stores	3,422,851	6,168	(3,416,683)	-100%
45121	Book Stores and News Dealers	2,949,583	6,168	(2,943,415)	-100%
451211	Book Stores	2,631,858	6,168	(2,625,690)	-100%
451212	News Dealers and Newsstands	317,725	0	(317,725)	-100%
45122	Prerecorded Tapes, CDs, Record Stores	473,268	0	(473,268)	-100%
452	General Merchandise Stores	150,148,996	13,802,438	(136,346,558)	-91%
4521	Department Stores Excl Leased Depts	66,695,214	0	(66,695,214)	-100%
4529	Other General Merchandise Stores	83,453,782	13,802,438	(69,651,344)	-83%
453	Miscellaneous Store Retailers	33,716,563	19,476,035	(14,240,528)	-42%
4531	Florists	1,305,406	423,078	(882,328)	-68%
4532	Office Supplies, Stationery, Gift Stores	16,304,441	358,769	(15,945,672)	-98%
45321	Office Supplies and Stationery Stores	7,786,079	251,167	(7,534,912)	-97%
45322	Gift, Novelty and Souvenir Stores	8,518,363	107,602	(8,410,761)	-99%
4533	Used Merchandise Stores	2,671,644	594,351	(2,077,293)	-78%
4539	Other Miscellaneous Store Retailers	13,435,072	18,099,837	4,664,765	35%
454	Non-Store Retailers	101,572,460	14,408,352	(87,164,108)	-86%
722	Foodservice and Drinking Places	135,652,883	18,285,584	(117,367,299)	-87%
7221	Full-Service Restaurants	61,638,347	3,563,340	(58,075,007)	-94%
7222	Limited-Service Eating Places	54,231,427	13,900,164	(40,331,263)	-74%
7223	Special Foodservices	14,502,763	821,851	(13,680,912)	-94%
7224	Drinking Places -Alcoholic Beverages	5,280,347	229	(5,280,118)	-100%



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

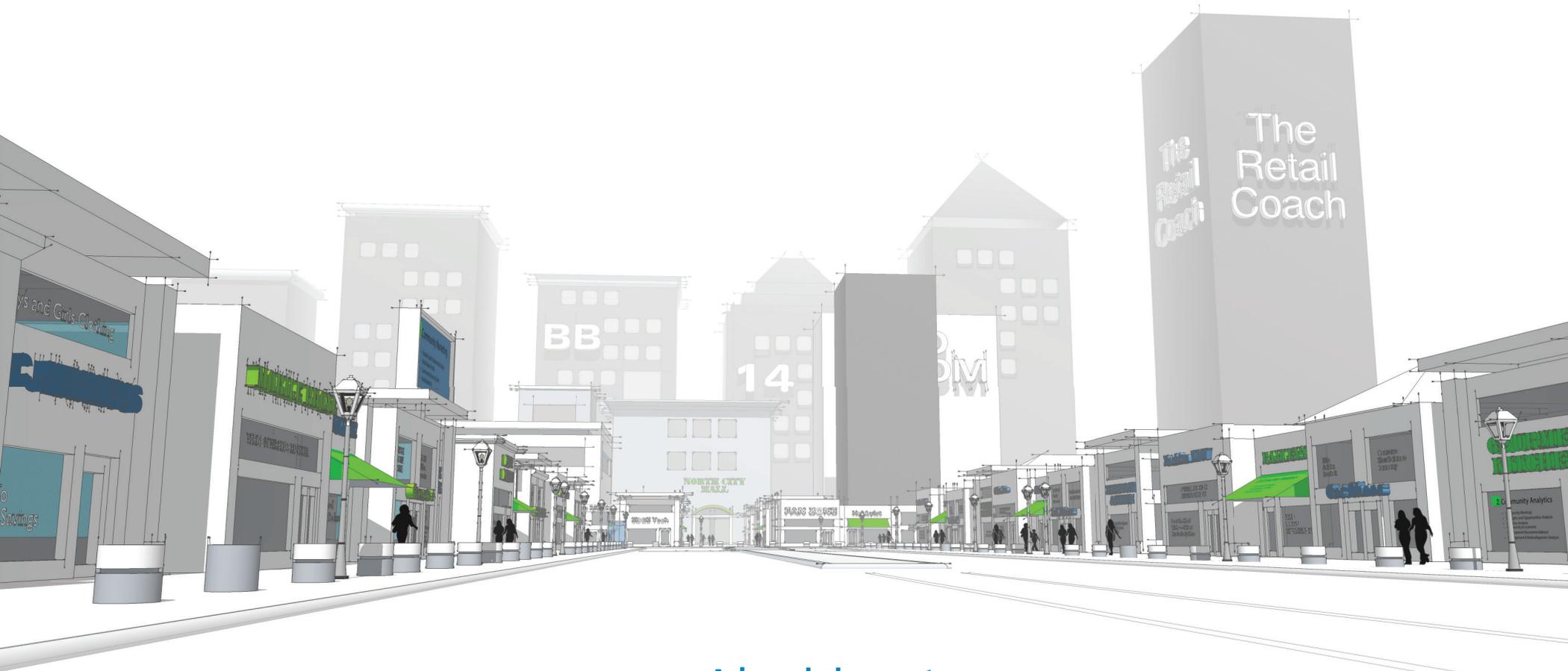
Providing more than simple data reports of psychographic and demographic trends, The Retail Coach goes well beyond other retail consulting and market research firms’ offerings by combining current national and statewide demographics and trend data with real-world, “on-the-ground” data gathered through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

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## 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 2014, 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.