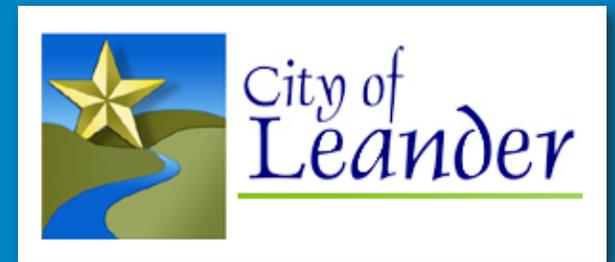




SECONDARY RETAIL TRADE AREA GAP/OPPORTUNITY ANALYSIS

Leander, Texas

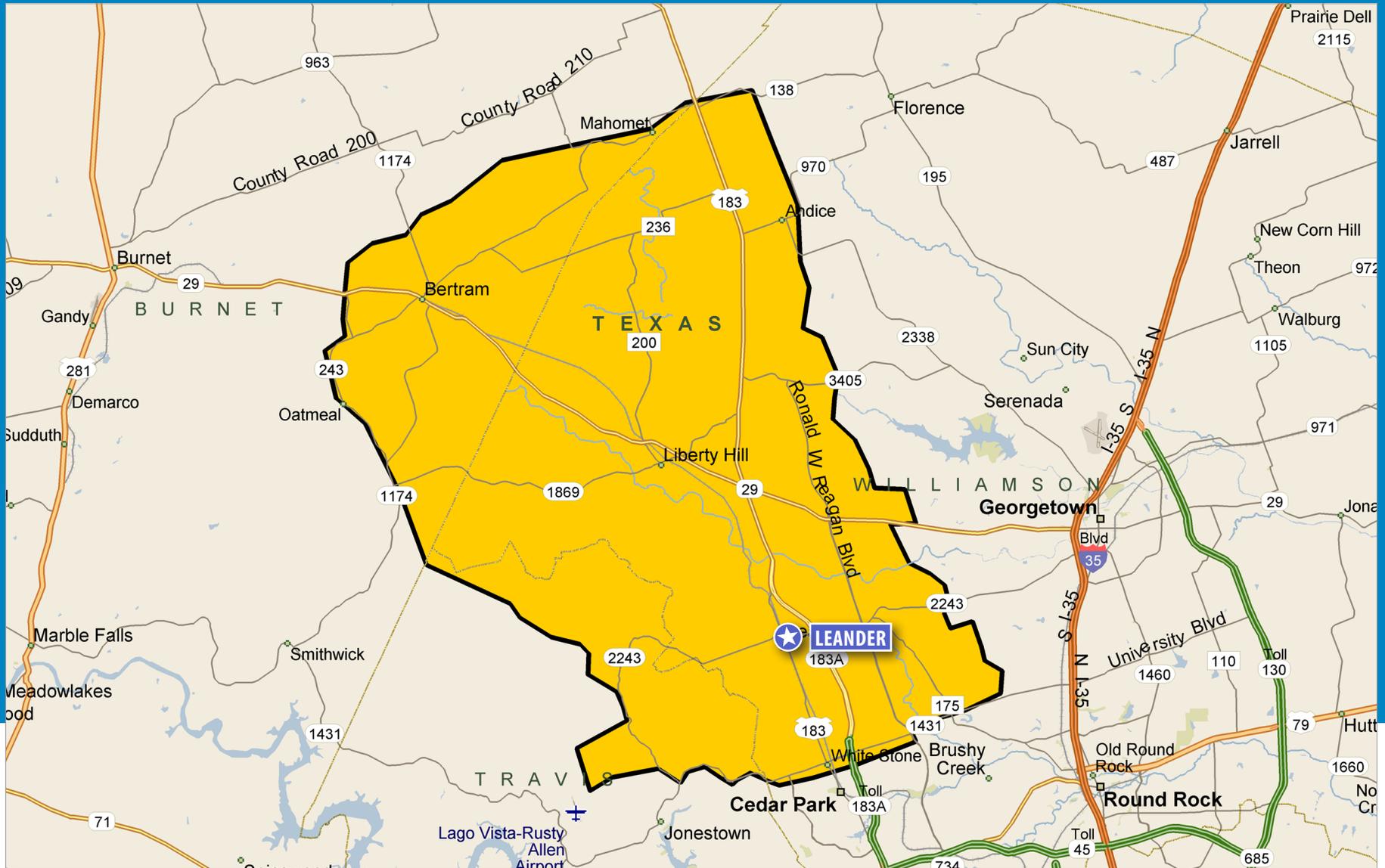


Prepared for
City of Leander
February 2015

 **TheRetailCoach®**

Secondary Retail Trade Area

Leander, Texas



City of
Leander

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Secondary Retail Trade Area | Gap/Opportunity Analysis Summary

Leander, Texas

SECTOR	DESCRIPTION	POTENTIAL SALES	EST. ACTUAL SALES	SURPLUS/LEAKAGE	% SURPLUS
	Total Retail Sales Incl Eating and Drinking Places	1,622,840,982	254,321,192	(1,368,519,790)	-84%
441	Motor Vehicle and Parts Dealers	308,159,843	16,927,484	(291,232,359)	-95%
4411	Automotive Dealers	260,426,934	6,136,229	(254,290,705)	-98%
4412	Other Motor Vehicle Dealers	23,845,722	3,763,189	(20,082,533)	-84%
4413	Automotive Parts/Accsrs, Tire Stores	23,887,188	7,028,066	(16,859,122)	-71%
442	Furniture and Home Furnishings Stores	33,548,253	1,028,017	(32,520,236)	-97%
4421	Furniture Stores	18,314,299	781,081	(17,533,218)	-96%
4422	Home Furnishing Stores	15,233,954	246,936	(14,987,018)	-98%
443	Electronics and Appliance Stores	30,230,500	595,314	(29,635,186)	-98%
44311	Appliances, TVs, Electronics Stores	21,914,354	554,557	(21,359,797)	-97%
443111	Household Appliances Stores	4,057,569	1,939	(4,055,630)	-100%
443112	Radio, Television, Electronics Stores	17,856,785	552,618	(17,304,167)	-97%
44312	Computer and Software Stores	7,352,984	40,757	(7,312,227)	-99%
44313	Camera and Photographic Equipment Stores	963,162	0	(963,162)	-100%
444	Building Material, Garden Equip Stores	169,437,693	45,843,522	(123,594,171)	-73%
4441	Building Material and Supply Dealers	145,927,942	44,062,075	(101,865,867)	-70%
44411	Home Centers	58,945,390	43,133,846	(15,811,544)	-27%
44412	Paint and Wallpaper Stores	2,500,821	0	(2,500,821)	-100%
44413	Hardware Stores	14,449,504	0	(14,449,504)	-100%
44419	Other Building Materials Dealers	70,032,227	928,229	(69,103,998)	-99%
4442	Lawn, Garden Equipment, Supplies Stores	23,509,751	1,781,447	(21,728,304)	-92%
44421	Outdoor Power Equipment Stores	6,759,147	536	(6,758,611)	-100%
44422	Nursery and Garden Centers	16,750,603	1,780,911	(14,969,692)	-89%

Secondary Retail Trade Area | Gap/Opportunity Analysis Summary

Leander, Texas

SECTOR	DESCRIPTION	POTENTIAL SALES	EST. ACTUAL SALES	SURPLUS/LEAKAGE	% SURPLUS
445	Food and Beverage Stores	190,183,476	65,208,109	(124,975,367)	-66%
4451	Grocery Stores	125,626,501	64,019,559	(61,606,942)	-49%
44511	Supermarkets, Grocery (Ex Conv) Stores	117,506,915	63,306,989	(54,199,926)	-46%
44512	Convenience Stores	8,119,586	712,570	(7,407,016)	-91%
4452	Specialty Food Stores	15,372,805	1,035,044	(14,337,761)	-93%
4453	Beer, Wine and Liquor Stores	49,184,170	153,506	(49,030,664)	-100%
446	Health and Personal Care Stores	84,438,511	21,843,589	(62,594,922)	-74%
44611	Pharmacies and Drug Stores	67,208,667	21,092,545	(46,116,122)	-69%
44612	Cosmetics, Beauty Supplies, Perfume Stores	5,933,185	145,313	(5,787,872)	-98%
44613	Optical Goods Stores	3,739,613	445,608	(3,294,005)	-88%
44619	Other Health and Personal Care Stores	7,557,046	160,123	(7,396,923)	-98%
447	Gasoline Stations	156,370,989	17,073,780	(139,297,209)	-89%
44711	Gasoline Stations With Conv Stores	113,274,675	16,639,682	(96,634,993)	-85%
44719	Other Gasoline Stations	43,096,314	434,098	(42,662,216)	-99%
448	Clothing and Clothing Accessories Stores	78,413,301	19,324,073	(59,089,228)	-75%
4481	Clothing Stores	43,441,142	16,122,322	(27,318,820)	-63%
44811	Men's Clothing Stores	2,126,024	3,748	(2,122,276)	-100%
44812	Women's Clothing Stores	10,294,759	626,448	(9,668,311)	-94%
44813	Childrens, Infants Clothing Stores	2,861,426	30,851	(2,830,575)	-99%
44814	Family Clothing Stores	22,650,624	15,280,444	(7,370,180)	-33%
44815	Clothing Accessories Stores	1,858,454	121,280	(1,737,174)	-93%
44819	Other Clothing Stores	3,649,854	59,551	(3,590,303)	-98%
4482	Shoe Stores	6,301,518	24,851	(6,276,667)	-100%
4483	Jewelry, Luggage, Leather Goods Stores	28,670,642	3,176,900	(25,493,742)	-89%
44831	Jewelry Stores	25,566,793	3,176,900	(22,389,893)	-88%
44832	Luggage and Leather Goods Stores	3,103,848	0	(3,103,848)	-100%

Secondary 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	32,401,659	504,895	(31,896,764)	-98%
4511	Sportng Goods, Hobby, Musical Inst Stores	28,005,831	498,727	(27,507,104)	-98%
45111	Sporting Goods Stores	14,972,243	162,283	(14,809,960)	-99%
45112	Hobby, Toys and Games Stores	7,681,014	336,444	(7,344,570)	-96%
45113	Sew/Needlework/Piece Goods Stores	2,516,427	0	(2,516,427)	-100%
45114	Musical Instrument and Supplies Stores	2,836,147	0	(2,836,147)	-100%
4512	Book, Periodical and Music Stores	4,395,828	6,168	(4,389,660)	-100%
45121	Book Stores and News Dealers	3,789,448	6,168	(3,783,280)	-100%
451211	Book Stores	3,381,549	6,168	(3,375,381)	-100%
451212	News Dealers and Newsstands	407,899	0	(407,899)	-100%
45122	Prerecorded Tapes, CDs, Record Stores	606,380	0	(606,380)	-100%
452	General Merchandise Stores	192,151,018	13,802,438	(178,348,580)	-93%
4521	Department Stores Excl Leased Depts	85,220,327	0	(85,220,327)	-100%
4529	Other General Merchandise Stores	106,930,690	13,802,438	(93,128,252)	-87%
453	Miscellaneous Store Retailers	43,362,285	19,476,035	(23,886,250)	-55%
4531	Florists	1,676,591	423,078	(1,253,513)	-75%
4532	Office Supplies, Stationery, Gift Stores	20,908,364	358,769	(20,549,595)	-98%
45321	Office Supplies and Stationery Stores	9,999,226	251,167	(9,748,059)	-97%
45322	Gift, Novelty and Souvenir Stores	10,909,138	107,602	(10,801,536)	-99%
4533	Used Merchandise Stores	3,416,883	594,351	(2,822,532)	-83%
4539	Other Miscellaneous Store Retailers	17,360,445	18,099,837	739,392	4%
454	Non-Store Retailers	130,344,805	14,408,352	(115,936,453)	-89%
722	Foodservice and Drinking Places	173,798,649	18,285,584	(155,513,065)	-89%
7221	Full-Service Restaurants	78,970,618	3,563,340	(75,407,278)	-95%
7222	Limited-Service Eating Places	69,471,848	13,900,164	(55,571,684)	-80%
7223	Special Foodservices	18,579,571	821,851	(17,757,720)	-96%
7224	Drinking Places -Alcoholic Beverages	6,776,613	229	(6,776,384)	-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

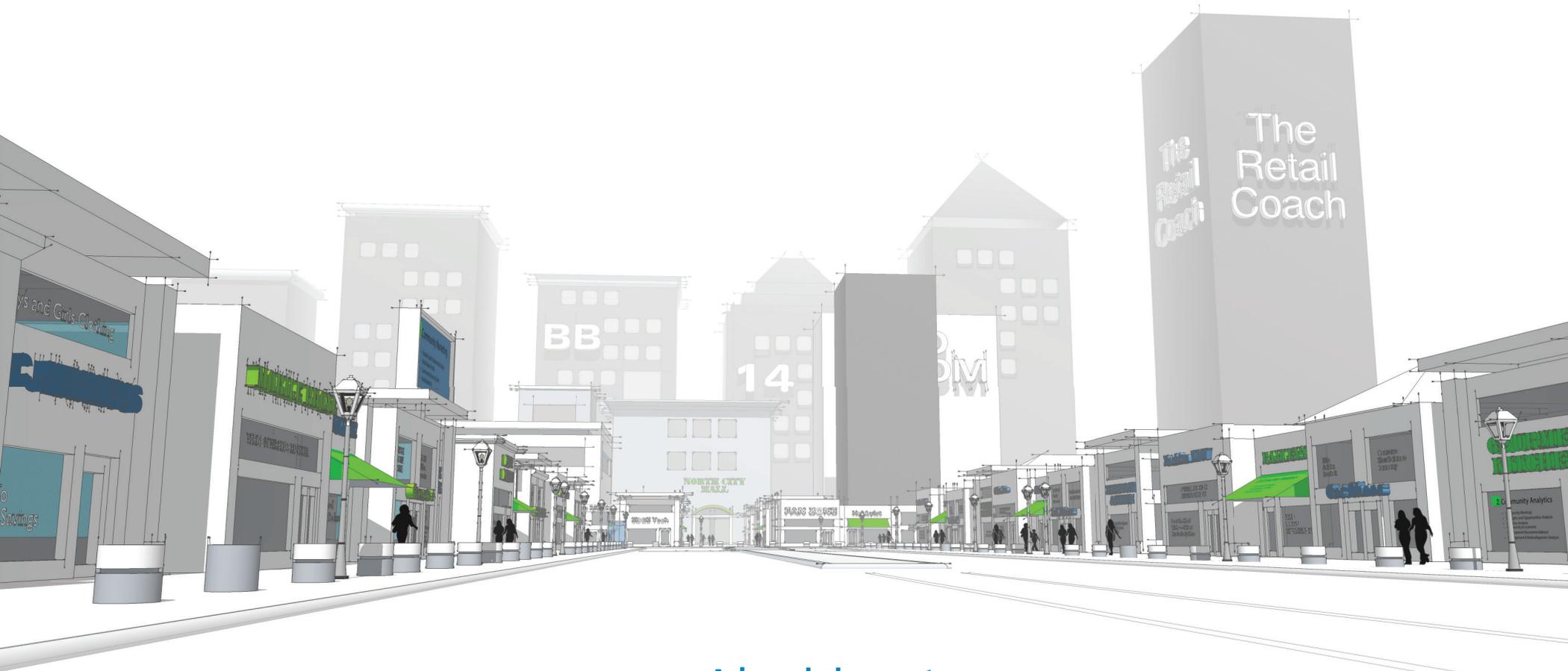
Providing more than simple data reports of psychographic and demographic trends, The Retail Coach goes well beyond other retail consulting and market research firms’ offerings by combining current national and statewide demographics and trend data with real-world, “on-the-ground” data gathered through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

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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.