



retail strategies

RECRUITMENT PLAN

Buda, TX



DISCOVER

# How you see it

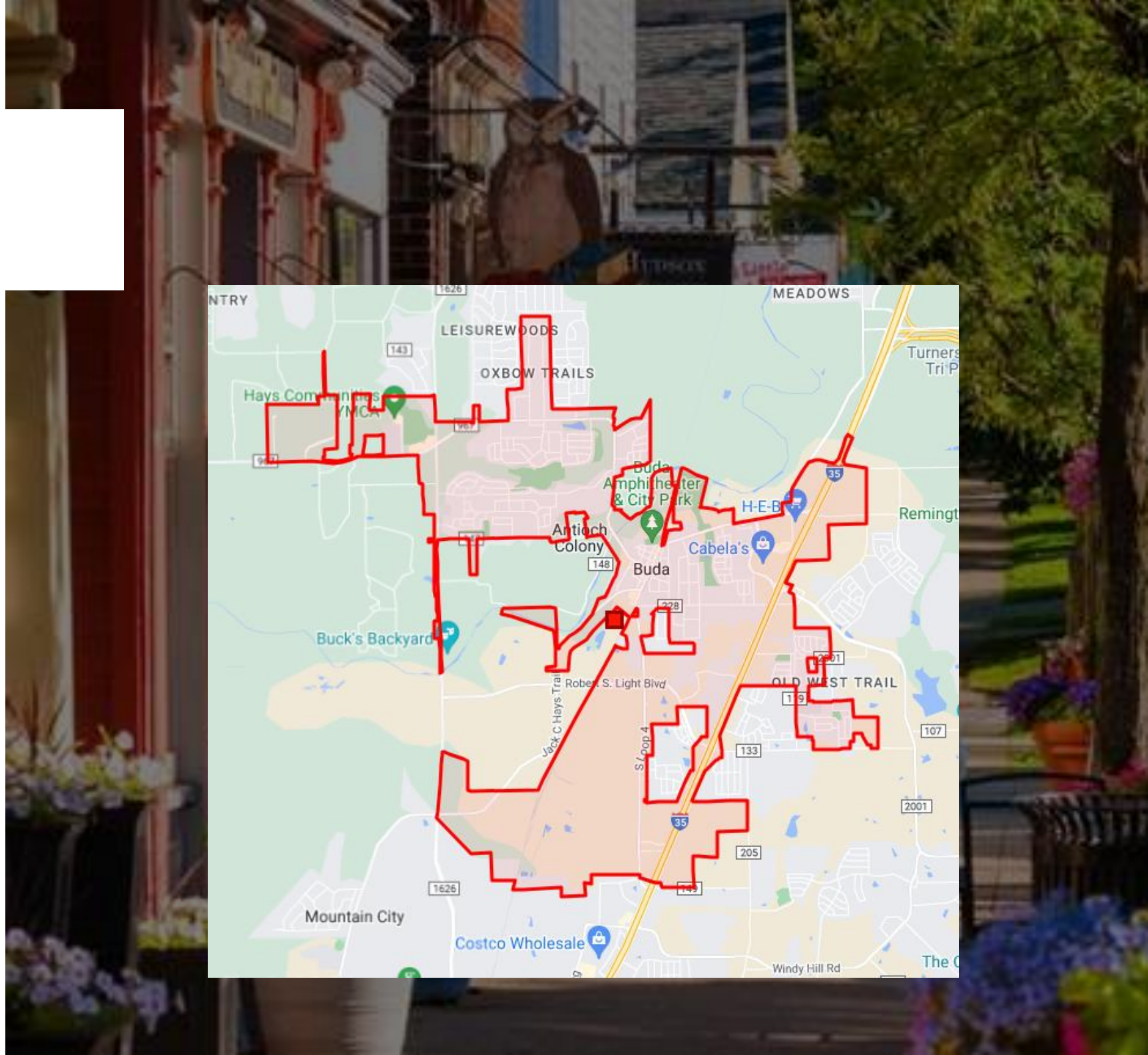
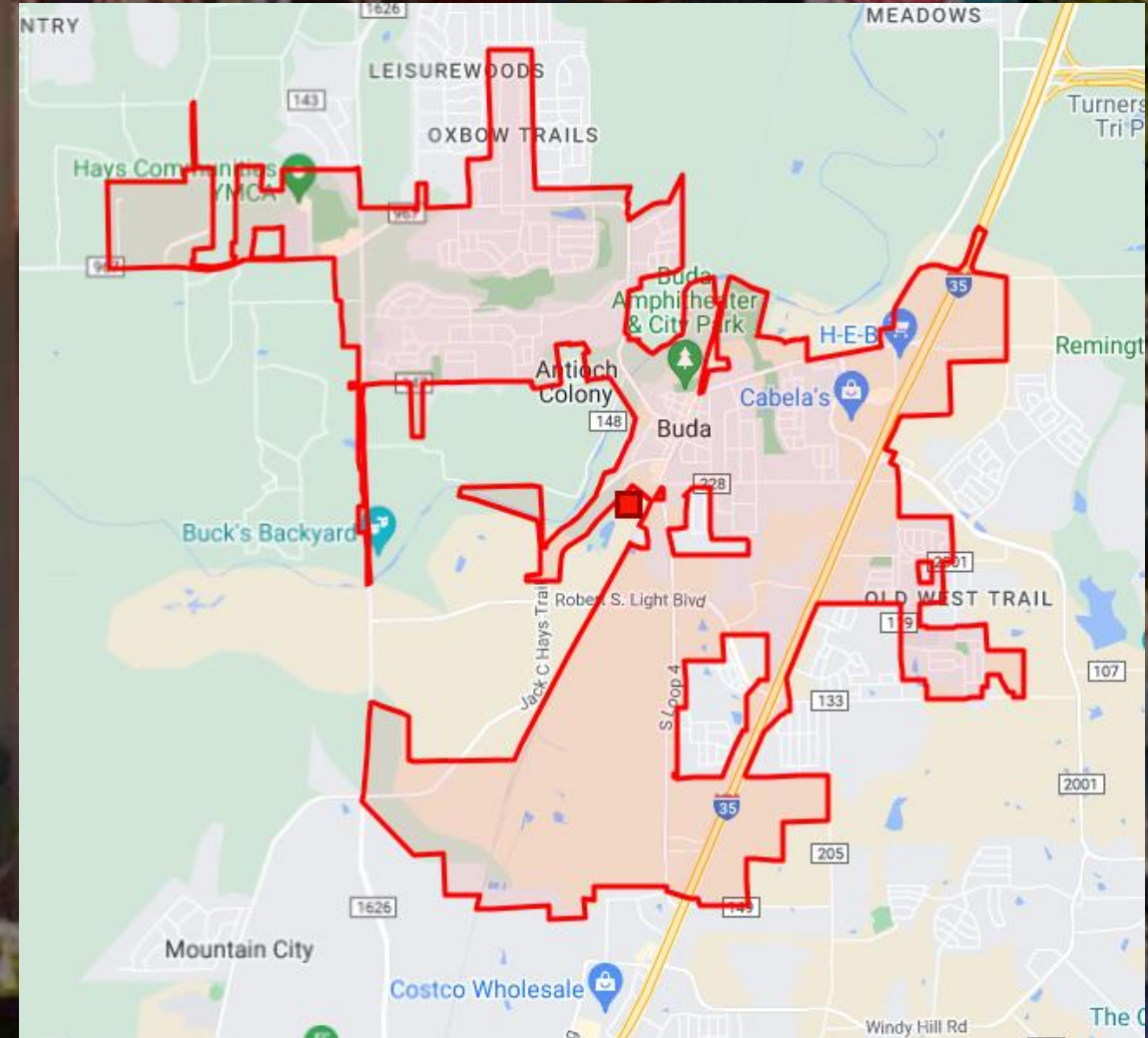
Buda, TX

Population 18,212



State of Texas

Population 29.53 million





DISCOVER

# How retailers see it

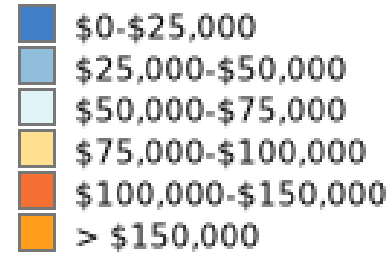
Residential Population Density

• 1 dot = 100

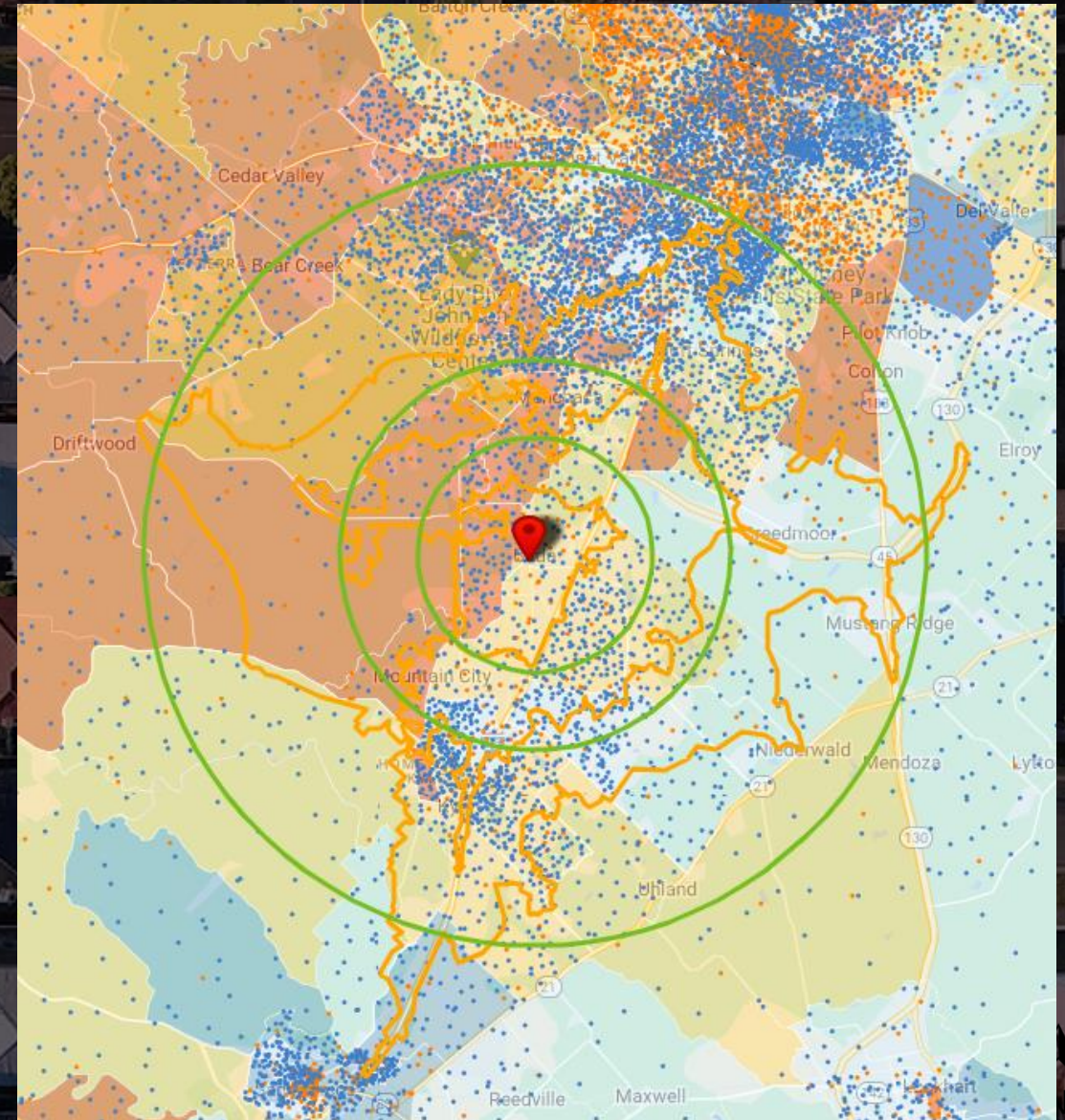
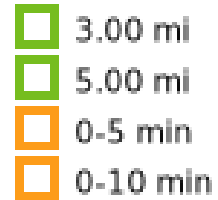
Daytime Employee Population Density

• 1 dot = 100

Median Household Income



Study Area



DISCOVER

# Your Demographic Playbook

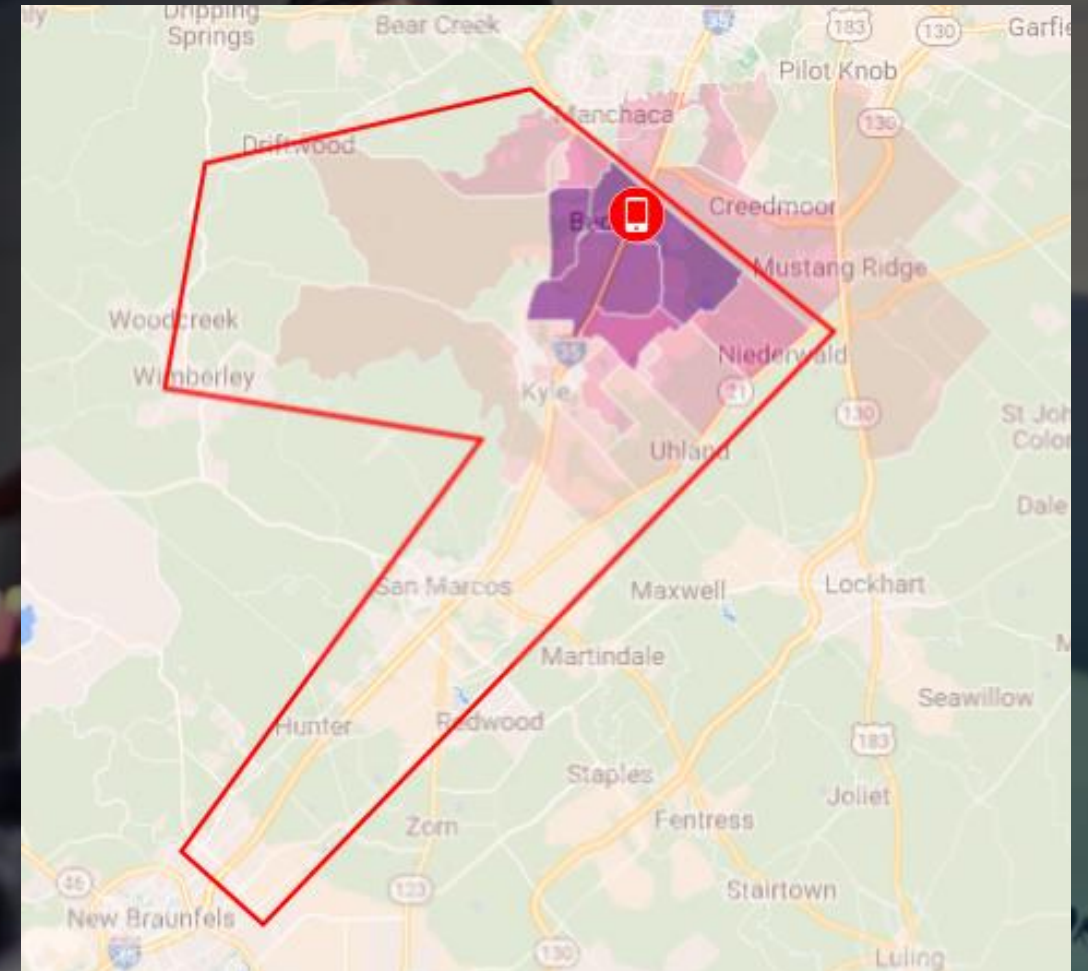
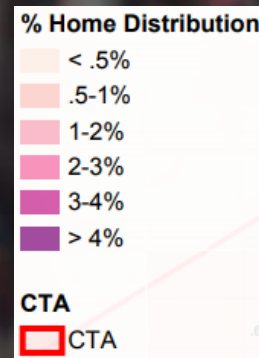
Category	3-Mile Radius	5-Mile Radius	10-Mile Radius	5-Minute Drive Time	10-Minute Drive Time	15-Minute Drive Time
Current Year Estimated Population	33,187	92,138	405,638	18,030	94,242	331,116
Number of Households	10,951	32,048	144,051	5,739	33,141	114,973
Projected Annual Growth (5 YR)	22.53%	18.04%	8.73%	23.45%	18.55%	11.08%
Median HH Income 2023	\$94,936	\$95,076	\$88,277	\$89,728	\$86,089	\$80,502
Current Year Average Age	36.5	36.6	35.8	34.9	35.4	35
Average Home Value	\$584,447	\$563,017	\$556,075	\$561,153	\$518,236	\$489,374
Current Year % Bachelor's Degree	31%	31%	28%	24%	29%	26%
Daytime Population	19,500	57,904	308,072	12,943	64,288	252,227
Labor Force	25,086	69,305	303,255	13,395	69,860	245,884



DISCOVER

# Mobile Data Collection

This mobile tracking service uses data collected from mobile phone users who have agreed within their apps and phone settings to enable location information. By drawing a geofence around a specific business or location, we are able to gather valuable data about the customer base that has actively used their mobile device while in the identified location. This tool allows us to see where customers are coming from to shop in your market using actual data. This information is used to optimize your trade area, analyze business locations, compare the frequency of visitors, and assist retailers in site selection. This is intended to support the trade area but does not solely define the trade area.



The location tracked was

**Buda H.E.B**

for the time period of

**March 2023**

**To**

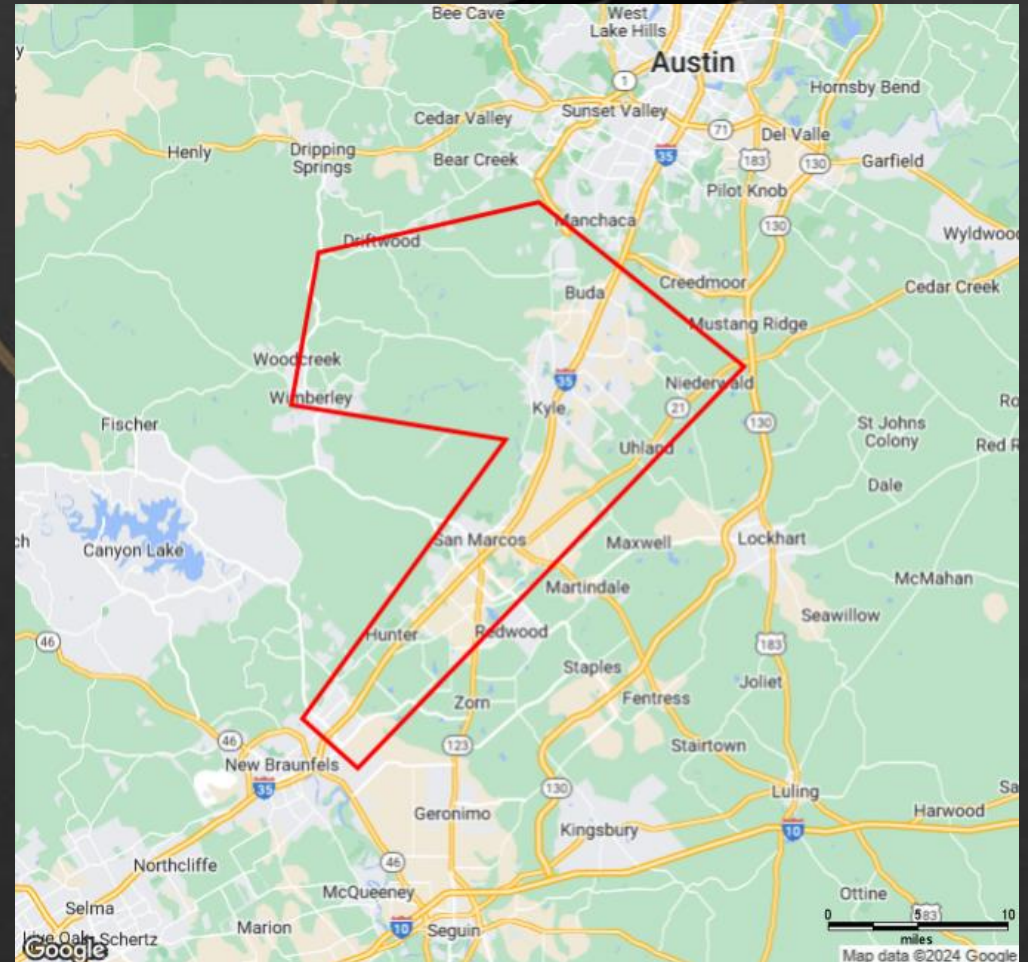
**March 2024**

DISCOVER

# Customized Trade Area

Each retailer has a specific set of site selection criteria they use to determine if they will have a profitable store. Municipal boundaries, radius rings and drive times are a start to evaluating the information sought by these decision makers. A customized trade area is the next step to analyzing a market. A trade area defines a core customer base of consumers highly likely to shop and eat in the market at least once a month. Your trade area has been created by combining the mobile tracking data with drive times, geographic boundaries, and proximity to neighboring shopping destinations. Each retailer will analyze their own trade area based on their existing stores, their competition and site selection criteria.

Retail Strategies has created the customized core trade area shown in the map here which is focused on a consumer who might travel to the market to shop or dine.



DISCOVER

# Customized Trade Area

237,258

2023 estimated population

267,234  
projected 2028 population

\$70,686  
Median household income



34

male average age

35

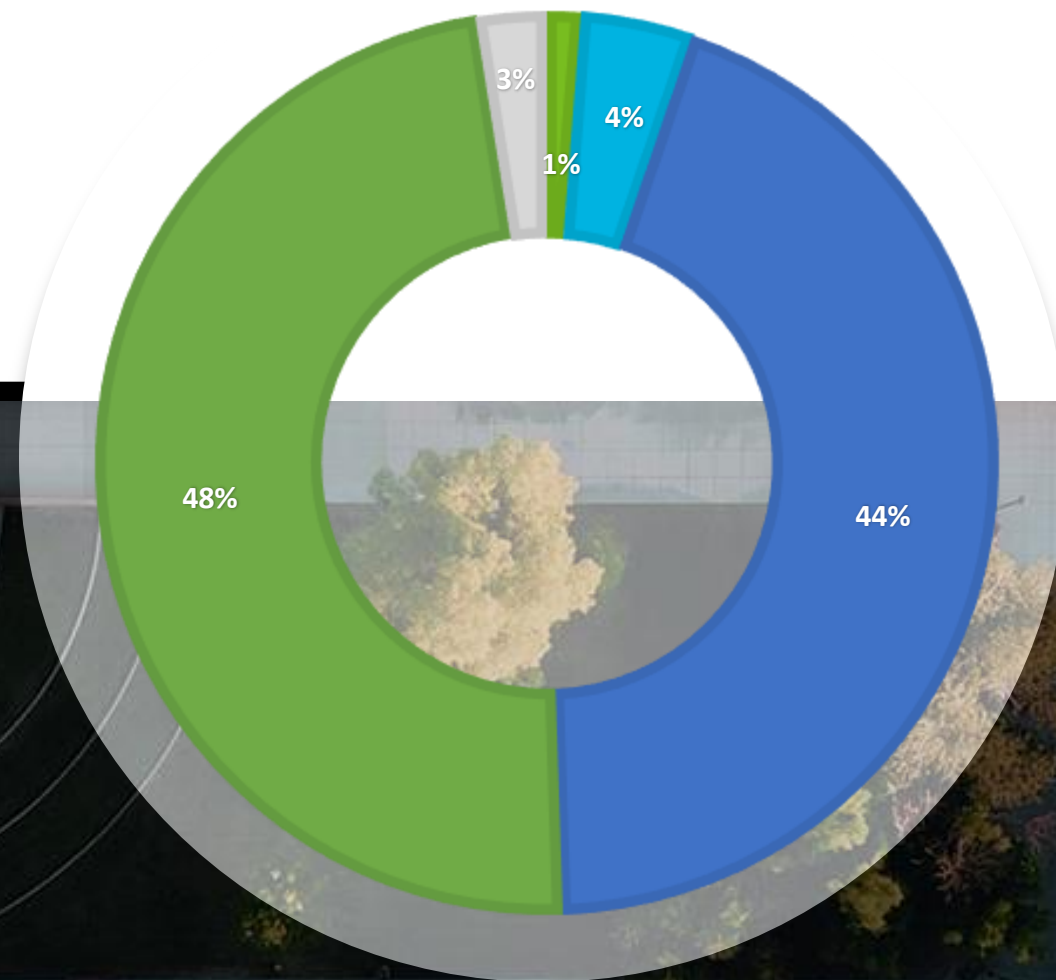
female average age



DISCOVER

# Customized Trade Area

CURRENT YEAR ESTIMATED  
POPULATION BY RACE



RACE

- Asian
- Black
- Latino
- White
- Other



DISCOVER

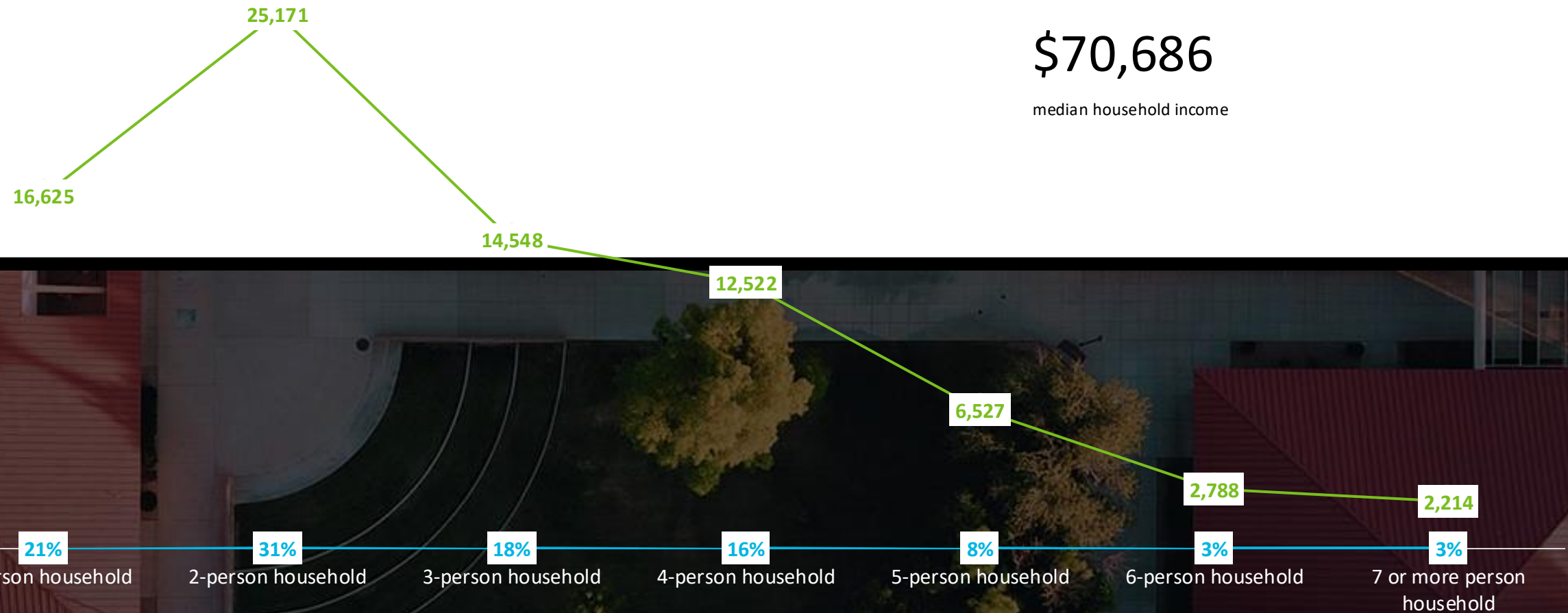
# Customized Trade Area

# 85,626

number of households

# \$70,686

median household income



CURRENT YEAR ESTIMATED HOUSEHOLDS BY HOUSEHOLD SIZE

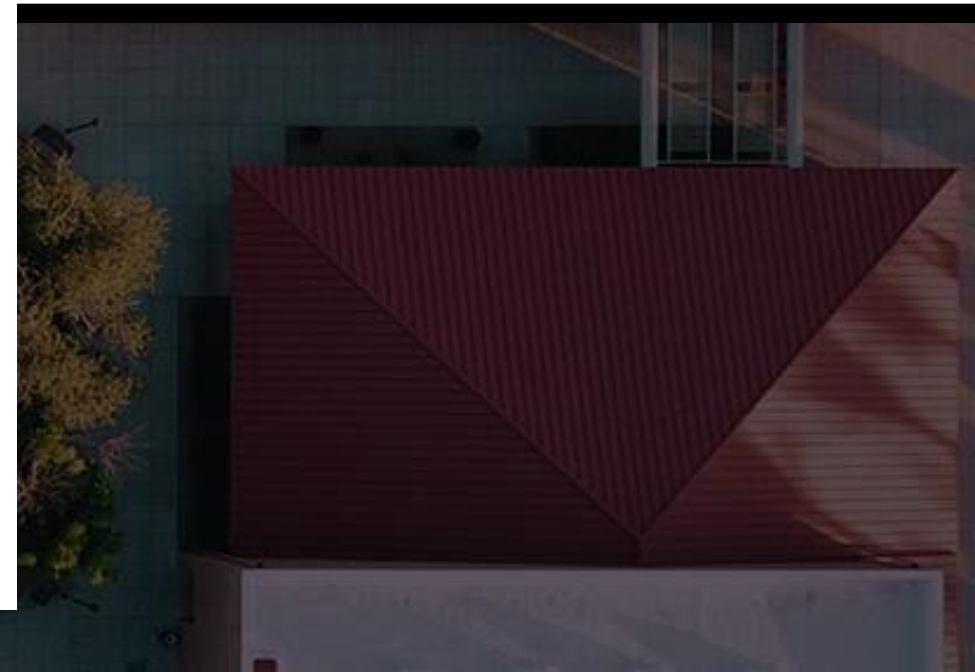
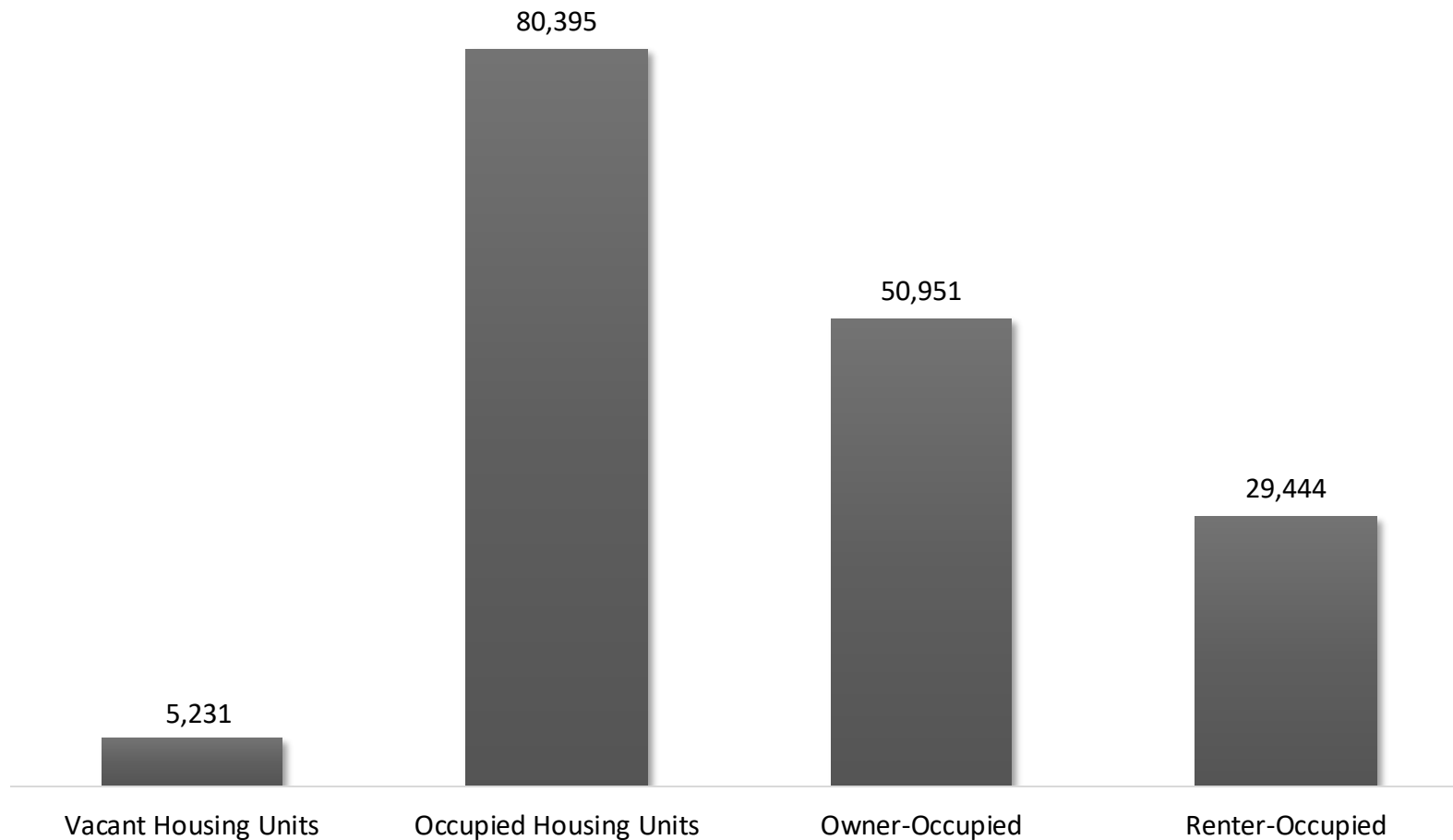
DISCOVER

# Customized Trade Area

2023 ESTIMATED HOUSING  
UNITS BY TENURE

**\$490,380**

average housing unit value





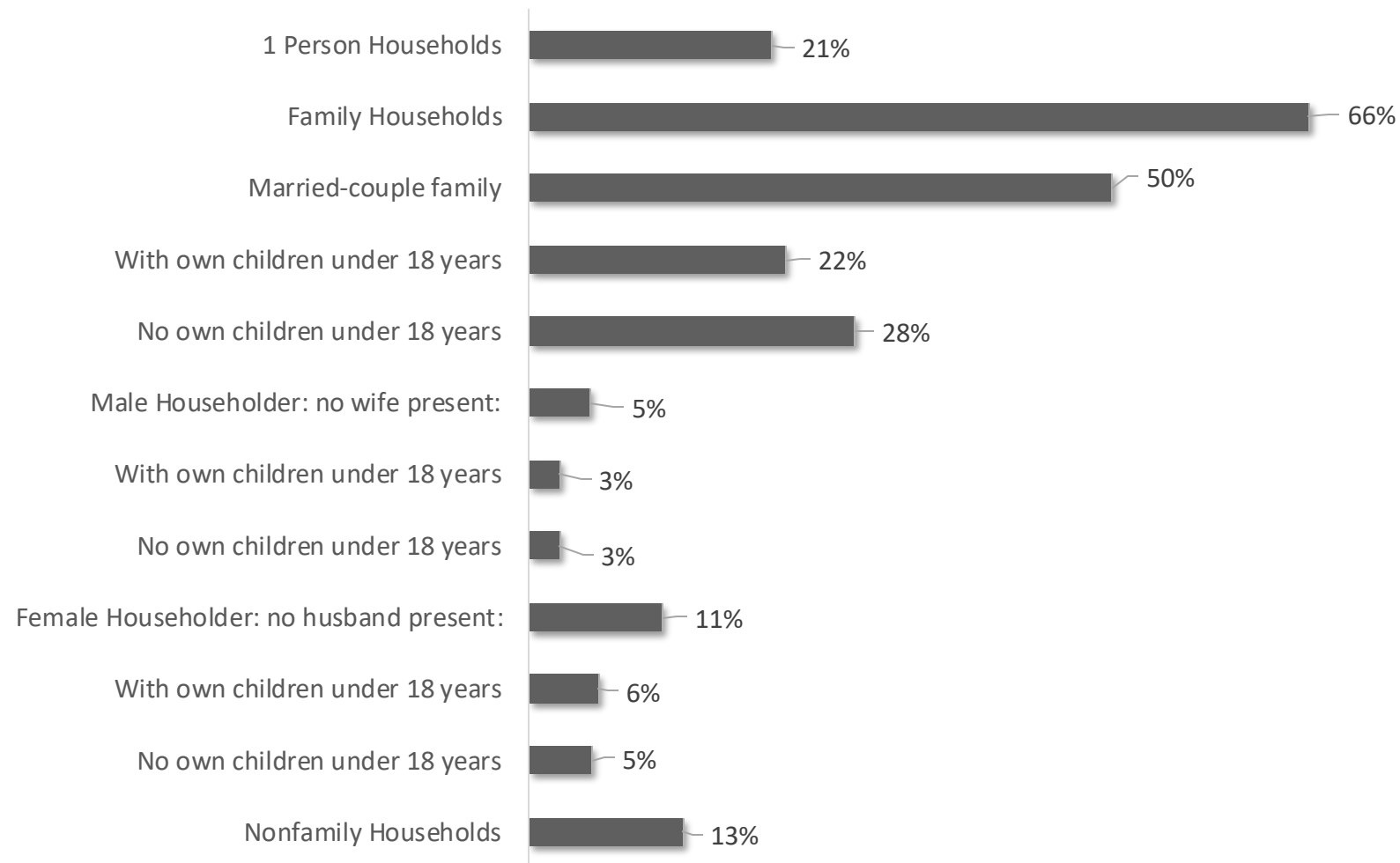
DISCOVER

# Custom Trade Area

## CURRENT YEAR ESTIMATED HOUSEHOLD BY TYPE

2.85

people per household



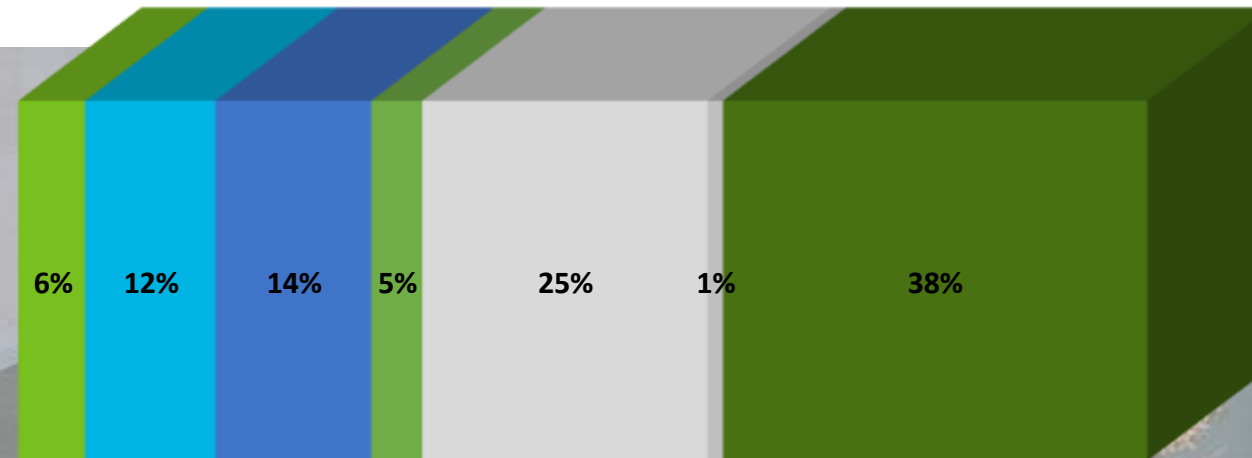
DISCOVER

# Customized Trade Area

222,263  
daytime population

daytime population

- Children at home
- Retired/Disable persons
- Homemakers
- Work at Home
- Employed
- Unemployed
- Student Populations



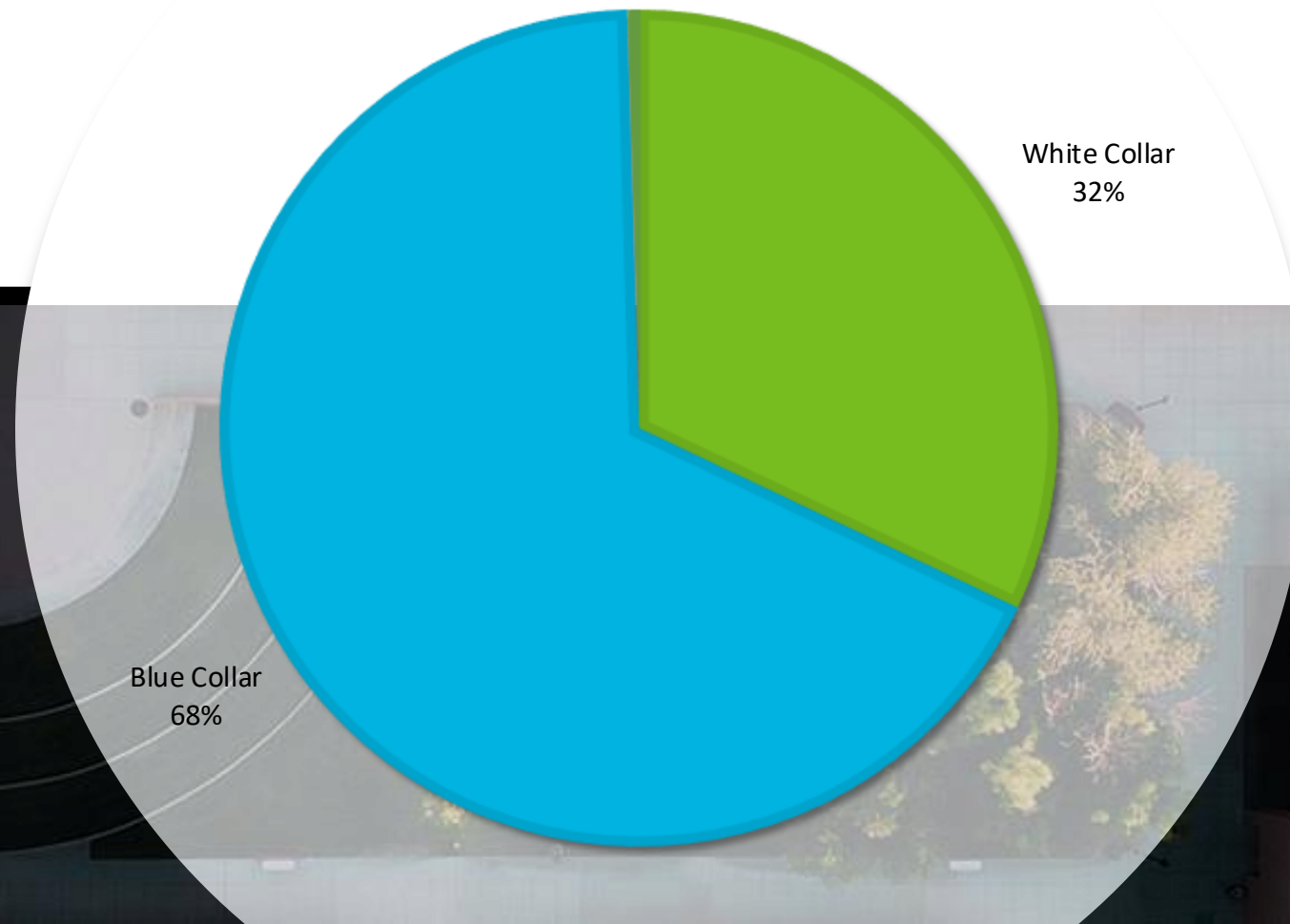


DISCOVER

# Customized Trade Area

**\$44,374**

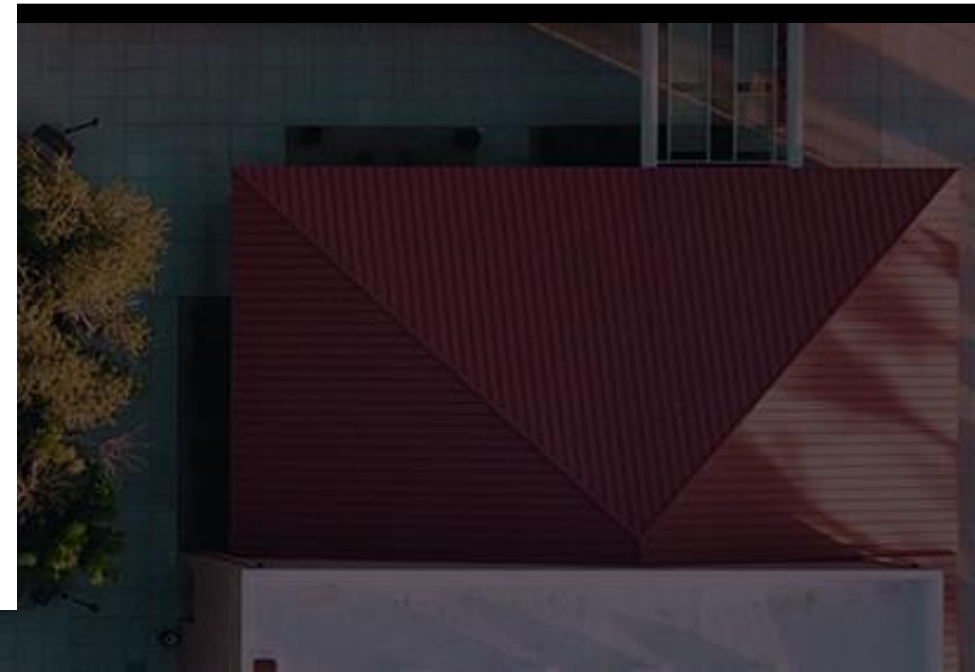
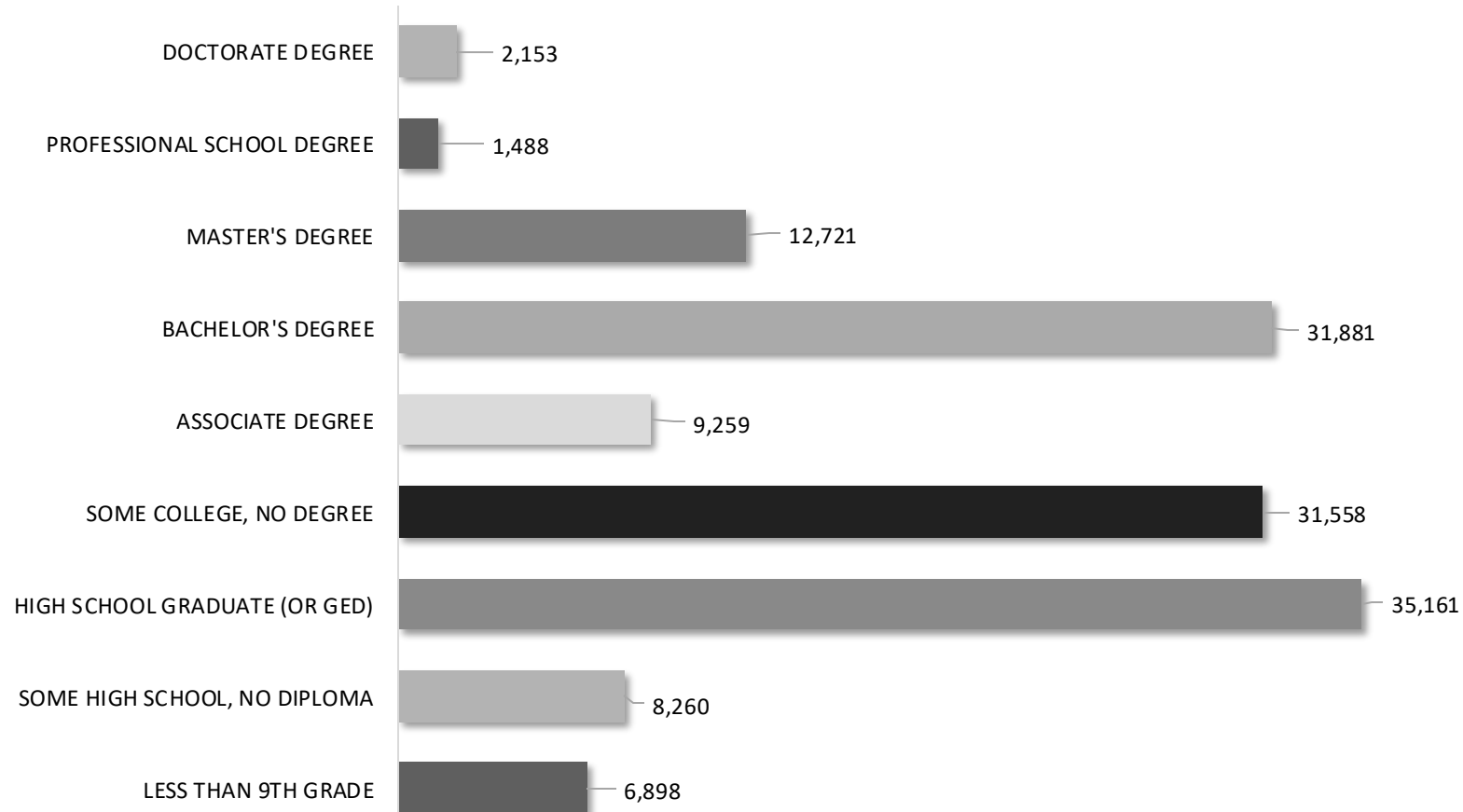
average employee salary



DISCOVER

# Customized Trade Area

CURRENT YEAR ESTIMATED POPULATION AGE 25+ BY EDUCATIONAL ATTAINMENT

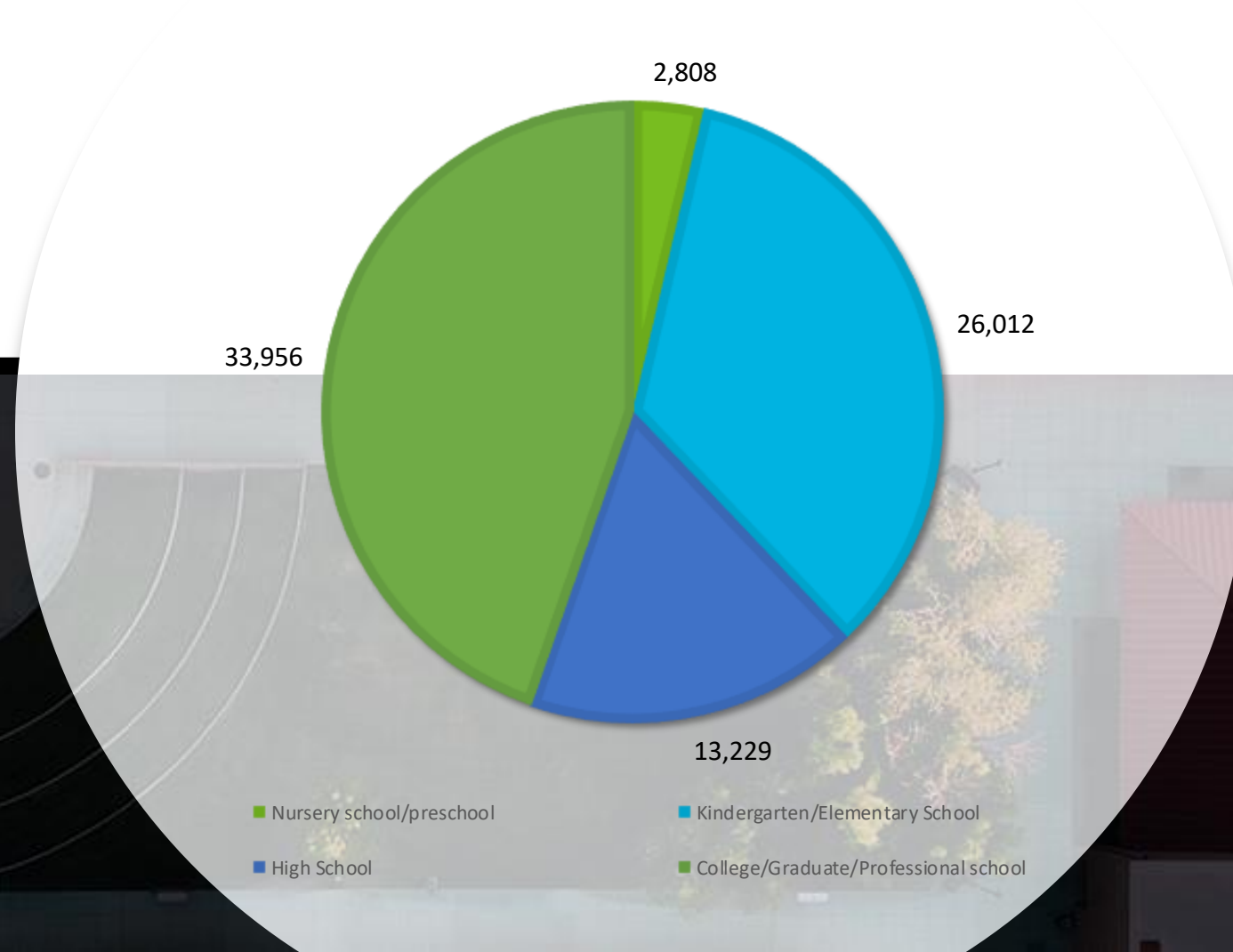




DISCOVER

# Customized Trade Area

CURRENT YEAR ESTIMATED  
POPULATION BY ENROLLMENT



DISCOVER

# Lifestyle Reports

Lifestyle reports allow **BIG DATA** to be summed up into a simple narrative on the personality of most households.

When asked “Who is Buda?”, often the community leadership describes themselves rather than the dominant personality of the area. Understanding consumer spending behavior based on personality allows Retail Strategies to better align the retail prospects with the purchasing patterns of the consumers in your market.

ESRI Tapestry Segmentation is a geodemographic segmentation system that integrates consumer traits with residential characteristics to identify markets and classify US neighborhoods.

Neighborhoods with the most similar characteristics are grouped together, while neighborhoods with divergent characteristics are separated. Internally homogenous, externally heterogeneous market segments depict consumers' lifestyles and life stages. Tapestry Segmentation combines the "who" of lifestyle

demography with the "where" of local geography to create a classification model with 67 distinct, behavioral market segments.

Selection of the variables used to identify consumer markets begins with data that includes household characteristics such as single person or family, income, relationships (married or multigenerational), and tenure; personal traits such as age, sex, education, employment, and marital status; and housing characteristics like home value or rent, type of housing (single-family, apartment, townhouse, or mobile home), seasonal status, and owner costs relative to income. In essence, any characteristic that is likely to differentiate consumer spending and preferences is assessed for use in identifying consumer markets.

# Research & Analytics

## TAPESTRY SEGMENTATION

The Fabric of America's Neighborhoods



### UNITED STATES OF AMERICA

Total Population: 314,468,000    Median Income: \$51,000    Home Ownership Rate: 64%  
Total Households: 118,979,000    Median Net Worth: \$71,000    Average Household Size: 2.58  
Median Age: 37.6    Diversity Index: 62.1    Home Value: \$177,000



**LIFEMODE SUMMARY GROUPS**

- 1. Affluent Estates: Established wealth, low-density, and luxurious amenities.
- 2. Upscale Avenues: Successful professionals, wealthy couples in higher density neighborhoods.
- 3. Uptown Individuals: Young, urban singles on the move.
- 4. Family Landscapes: Successful younger families in lower density settings.
- 5. Gen X Urban: Middle-aged, middle-class families with home-based work.
- 6. Cozy Country Living: Empty homes in family settings.
- 7. Ethnic Enclaves: Established diversity—young, Hispanic immigrants with families.
- 8. Middle Ground: Diverse mix of demographics.
- 9. Senior Styles: Singletons need the comforts of home.
- 10. Rustic Outposts: Rural lifestyle seekers, often transplants.
- 11. Midtown Singles: Successful young professionals, urban transplants.
- 12. Hometown: Younger, middle-class families, often transplants.
- 13. Next Wave: Young, diverse, young, diverse, high-density, urban.
- 14. Scholars and Patriots: College-educated, urban neighborhoods.

**URBANIZATION SUMMARY GROUPS**

- 1. Principal Urban Centers: Young, middle-class, diverse in nature of 2.5+ million people.
- 2. Urban Periphery: City life for working families with single-family homes.
- 3. Metro Cities: Metropolitan city life, including middle-class, middle-class.
- 4. Suburban Periphery: Affluent in the suburbs, middle-class families, younger transplants.
- 5. Suburbs: Small town living, middle-class, affordable homes.
- 6. Rural: Country living with other families, low density, and low diversity.

FOR MORE INFORMATION ABOUT TAPESTRY SEGMENTATION  
+1 813 252-4511  
+1 813 252-4511  
+1 813 252-4511



**DEFINITIONS IN THE SEGMENT DESCRIPTIONS**

- Household: 2010 Census Family and non-family.
- Family: Married couples.
- Family: Married couples with children.
- Family: Single parent.
- Family: Single parent with children.
- Family: Single.

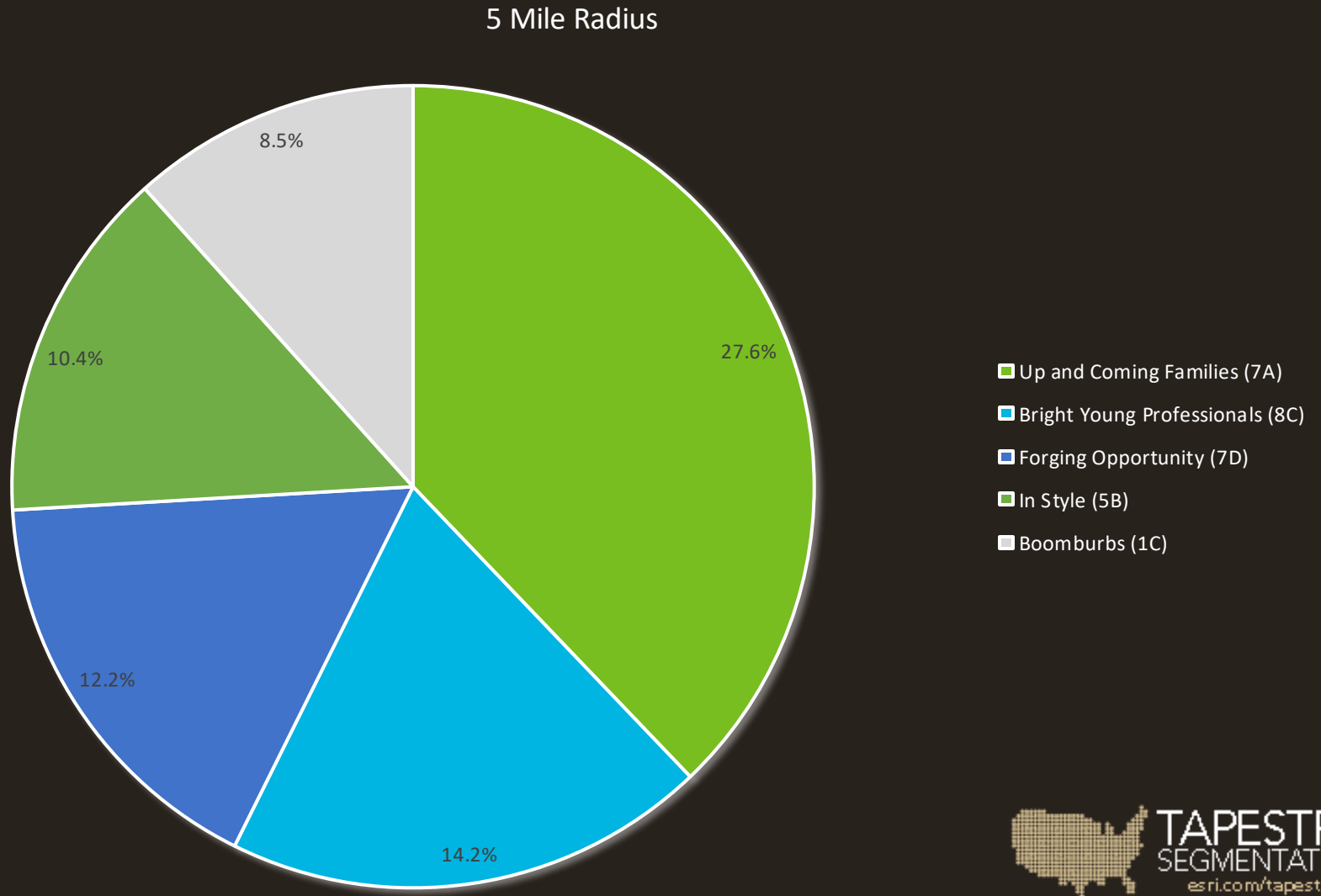
**SEGMENT LEGEND**

1 Segment Name  
2 Population  
3 Median Income  
4 Median Net Worth  
5 Home Value  
6 Home Ownership Rate  
7 Average Household Size  
8 Diversity Index

Segment Name: Reflects the LifeMode Summary Group.  
Population: Reflects the total number of people in the segment.  
Median Income: Reflects the typical median income of the segment.  
Median Net Worth: Reflects the typical net worth of the segment.  
Home Value: Reflects the typical home value of the segment.  
Home Ownership Rate: Reflects the percentage of the segment that owns their home.  
Average Household Size: Reflects the average number of people per household in the segment.  
Diversity Index: Reflects the diversity of the segment.



# ESRI Tapestry Segmentation



# ESRI Tapestry Segmentation



LifeMode Group: Sprouting Explorers

## Up and Coming Families

Households: 2,901,200

Average Household Size: 3.12

Median Age: 31.4

Median Household Income: \$72,000

LifeMode Group: Middle Ground

## Bright Young Professionals

Households: 2,750,200

Average Household Size: 2.41

Median Age: 33.0

Median Household Income: \$54,000

# ESRI Tapestry Segmentation



LifeMode Group: Sprouting Explorers

## Forging Opportunity

Households: 1,289,900

Average Household Size: 3.62

Median Age: 28.9

Median Household Income: \$38,000

LifeMode Group: GenXurban

## In Style

Households: 2,764,500

Average Household Size: 2.35

Median Age: 42.0

Median Household Income: \$73,000



DISCOVER

# GAP Analysis

The GAP Analysis helps us uncover the number of dollars being spent outside of the community on an annual basis from a categorical perspective.

The difference between demand and supply represents the opportunity gap or surplus available for each merchandise line in the specified reporting geography. When the demand is greater than (less than) the supply, there is an opportunity gap (leakage) for that merchandise line. For example, a positive value signifies an opportunity gap, while a negative value signifies a surplus.

Retail Strategies uses STI: PopStats as our provider of consumer demand and supply by establishment (or GAP) information. Several demographers provide the data in a variety of ways. Following are the sources and methodologies used by STI: PopStats and Retail Strategies to draw conclusions for you.

The market supply data is derived from annual retail sales and expenditures from the source data. The source for market supply is the U.S. Census Bureau's monthly and annual Census of Retail Trade (CRT) Reports; U.S. Census Bureau's Economic Census. The source for the establishment is the Bureau of Labor Statistics (BLS). The consumer demand data by the establishment is derived from the

BLS Consumer Expenditure Survey (CE).

Industries for the consumer expenditures survey are categorized and defined by the North American Industry Classification System (NAICS). Retail Strategies has narrowed down the categories to only those with real estate growth potential based on national trends.

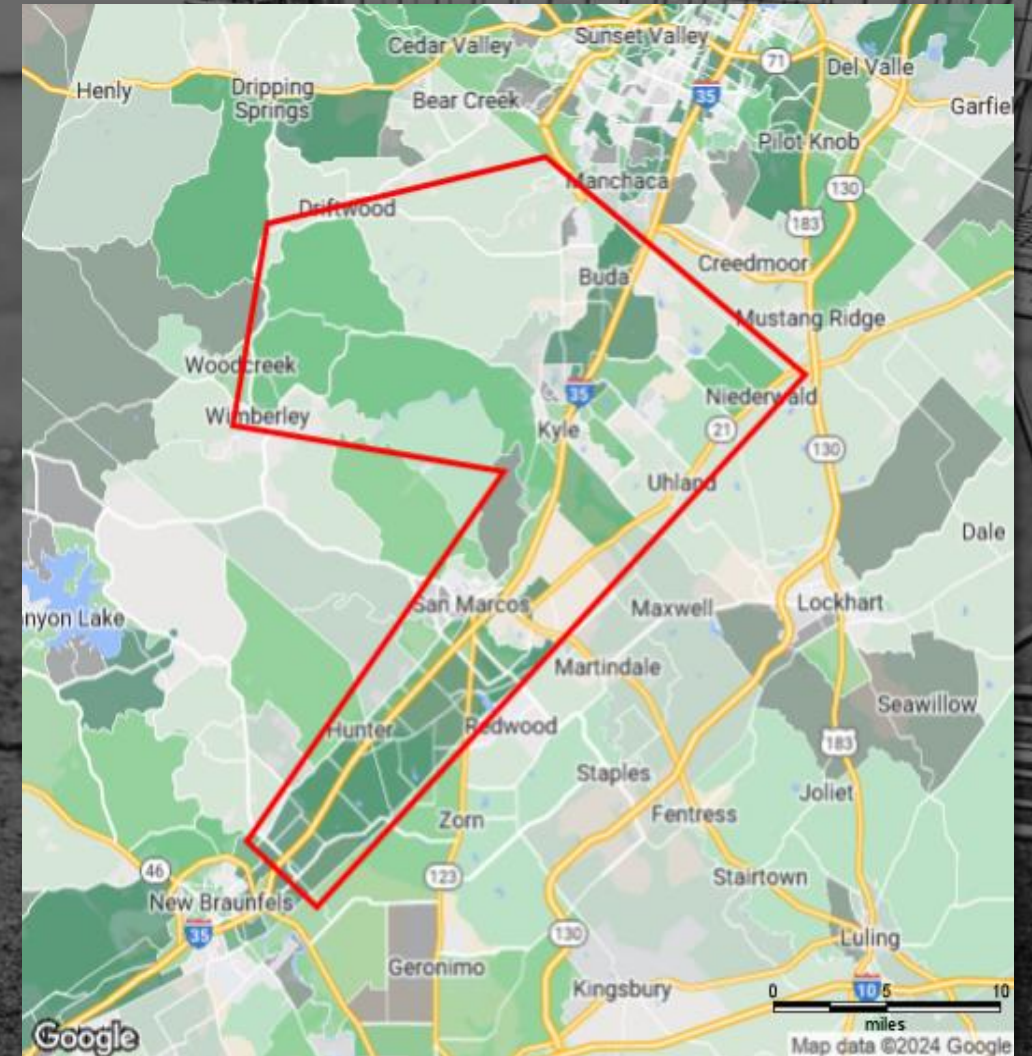
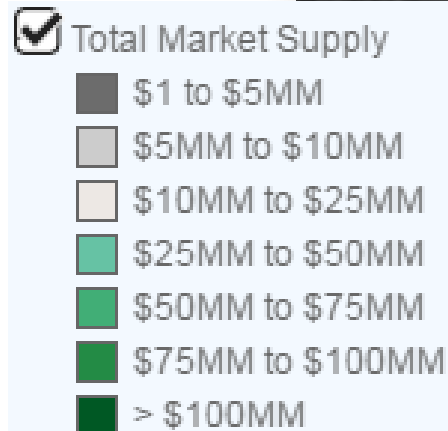
Data is rarely perfect, but proper analysis, it can get us a lot closer to the answer than we would be without it. This is one of several tools used to identify focus categories for recruitment. Our focus in this area is more on the category than the actual dollar amounts.

DISCOVER

# Total Market Supply

## \$3,475,986,611

This represents the amount captured by businesses located in the defined trade area. By block group, the areas with darker green captured more dollars than the gray areas.

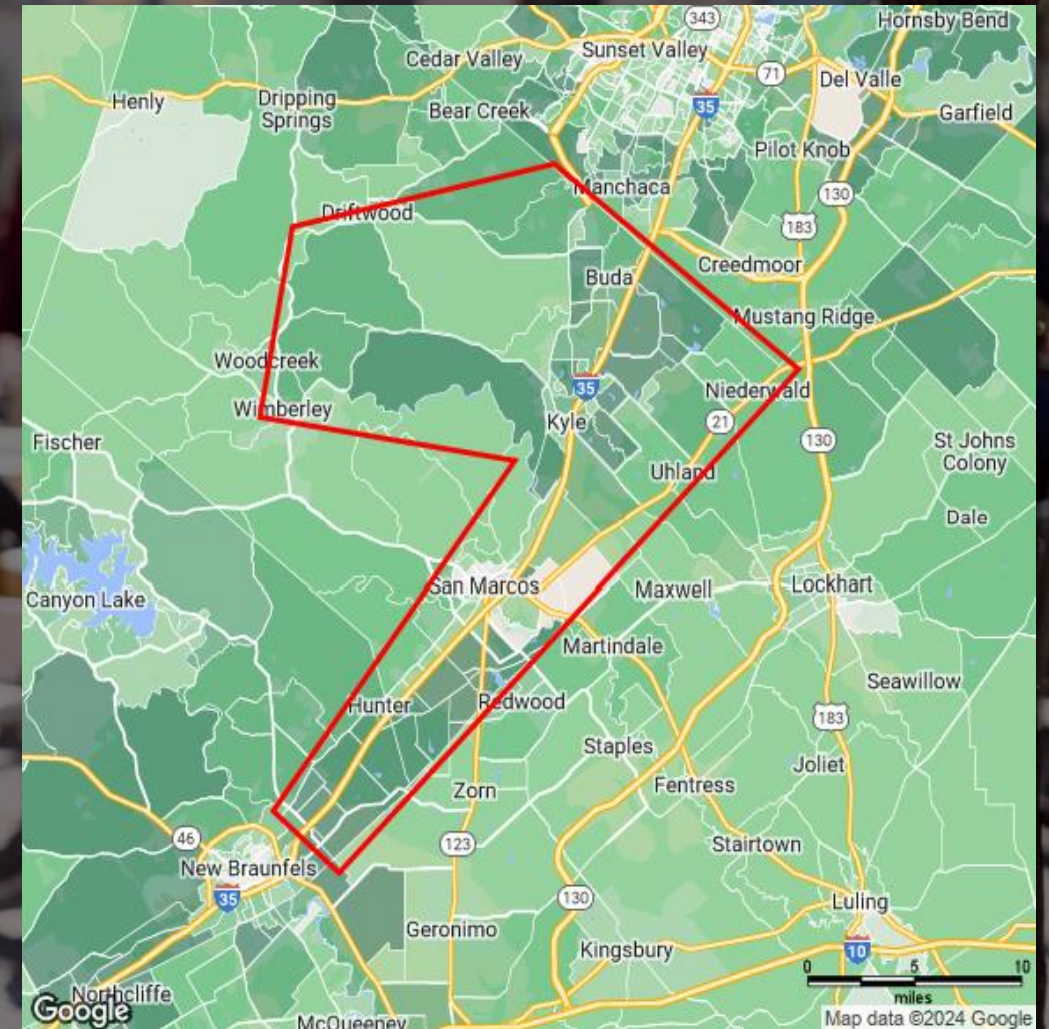
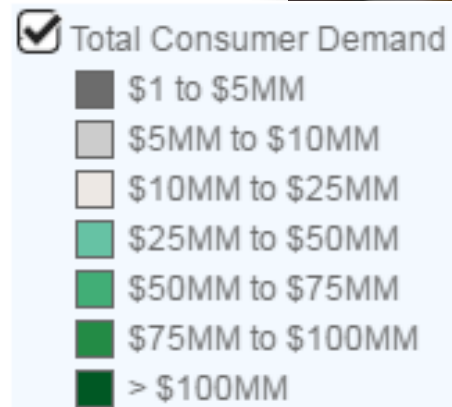


DISCOVER

# Total Market Demand

## \$4,418,267,499

This represents the amount spent by consumers located in the defined trade area. By block group, the areas with darker green captured more dollars than the gray areas.



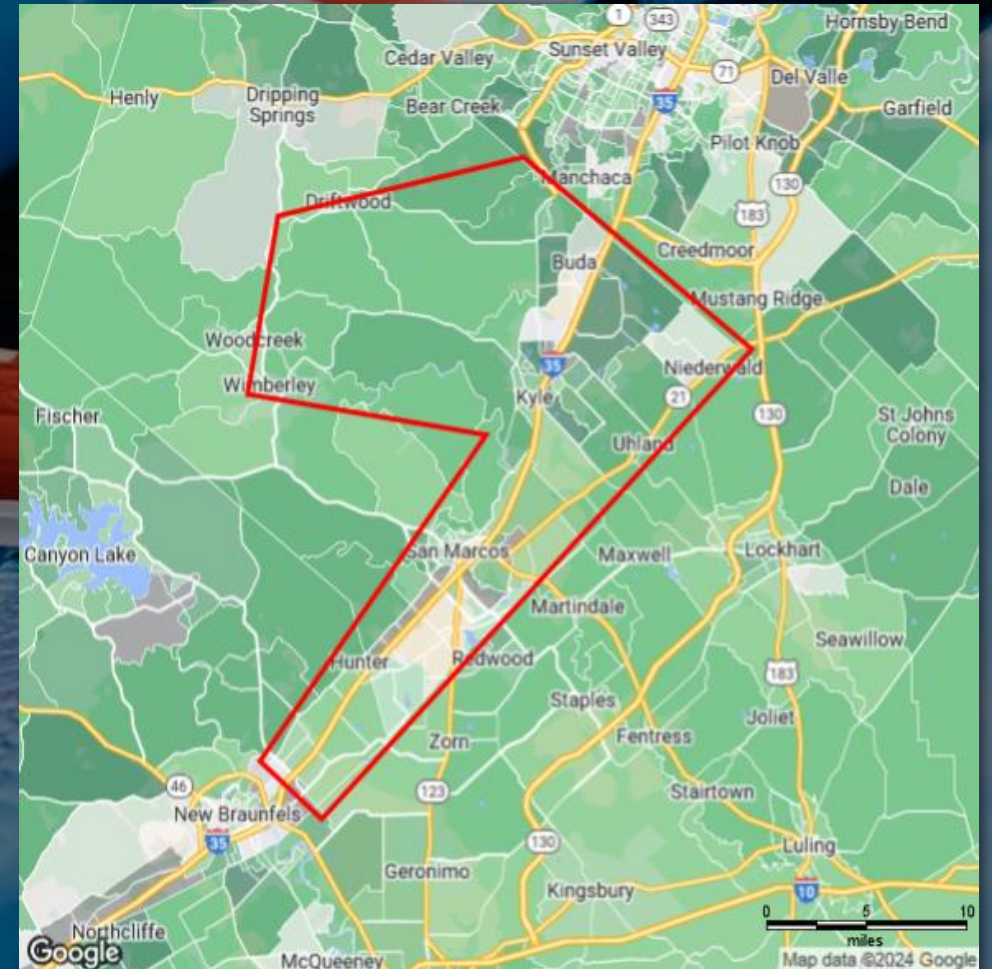


DISCOVER

# Opportunity Gap

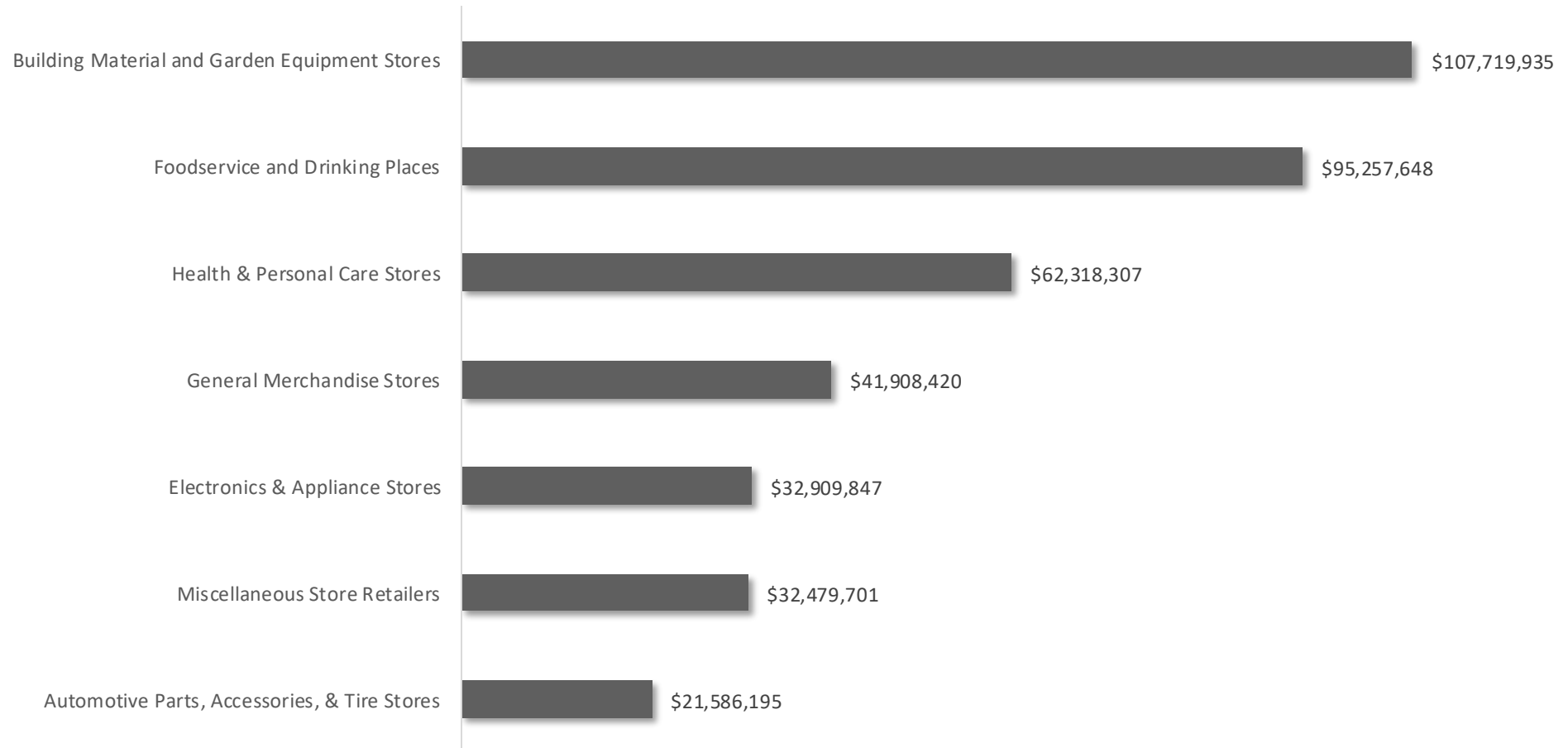
**\$942,280,888**

This means more people purchase items outside of the defined Buda trade area than in the Buda defined trade area for their consumer goods and services. Finding the specific categories where they are leaving the market is the key. Dark gray shows block groups of retail synergy capturing those dollars. This is where our focus will be to place new retailers and restaurants.



DISCOVER

# Consumer Demand & Supply



DISCOVER

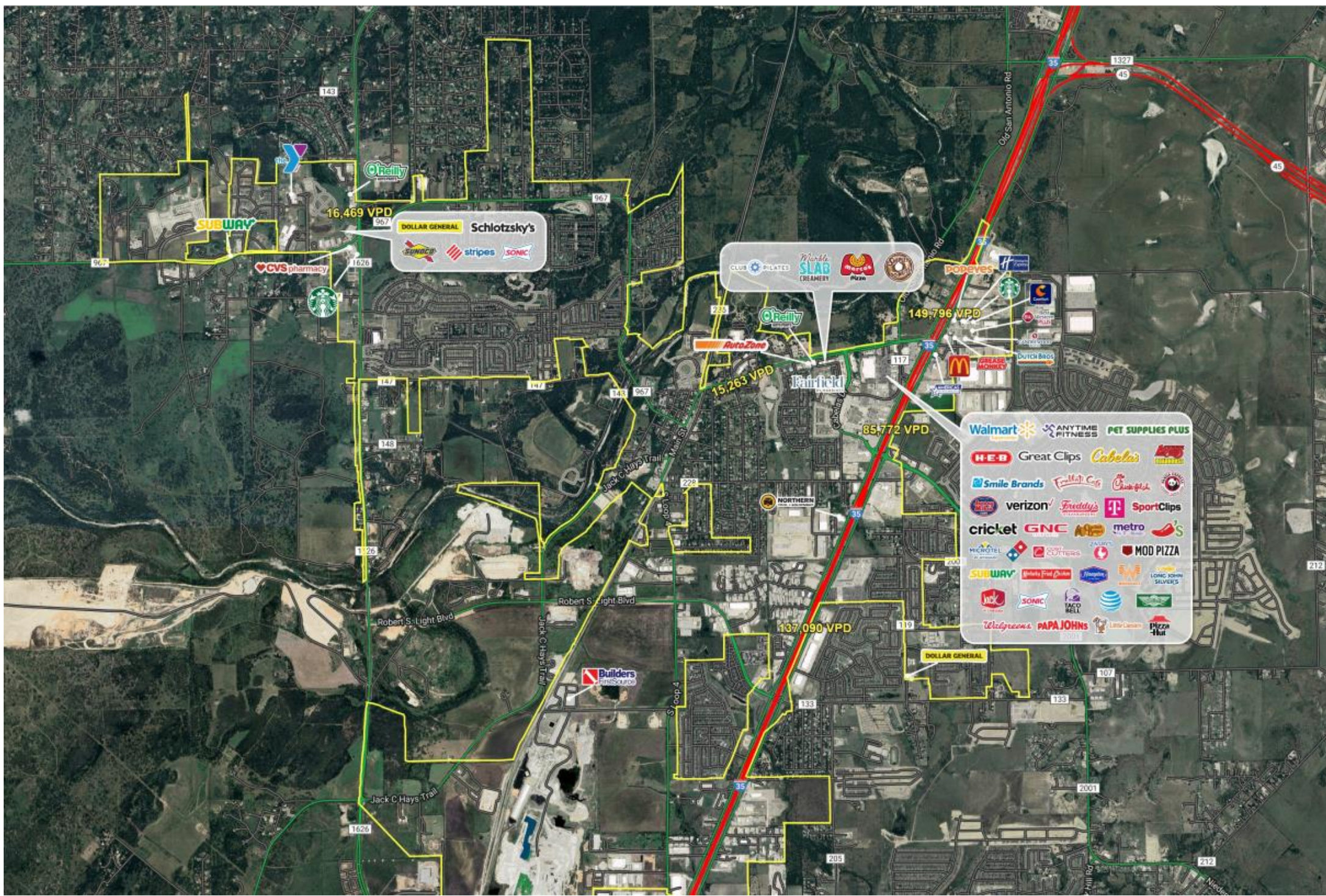
# Peer Analysis

## Retail Node Comparison Report – 10 Minute Drive Time

Address	City	State	Residential Population	Daytime Population	Median HH Income	Market Supply
<b>Walmart</b>	<b>Buda</b>	<b>TX</b>	<b>94,242</b>	<b>64,288</b>	<b>\$86,089</b>	<b>\$1,324,506,414</b>
1115 NM Highway 528 SE	Rio Rancho	NM	93,728	84,369	\$73,697	\$3,174,962,993
5754 Kyle Pkwy	Kyle	TX	97,698	65,364	\$82,316	\$1,075,965,243
1401 N Saginaw Blvd	Saginaw	TX	92,298	70,614	\$92,975	\$531,919,467
8015 Woodbridge Pkwy	Sachse	TX	99,830	80,859	\$108,000	\$695,889,803
1301 E. FM 1187	Crowley	TX	95,366	82,310	\$80,520	\$1,188,380,821



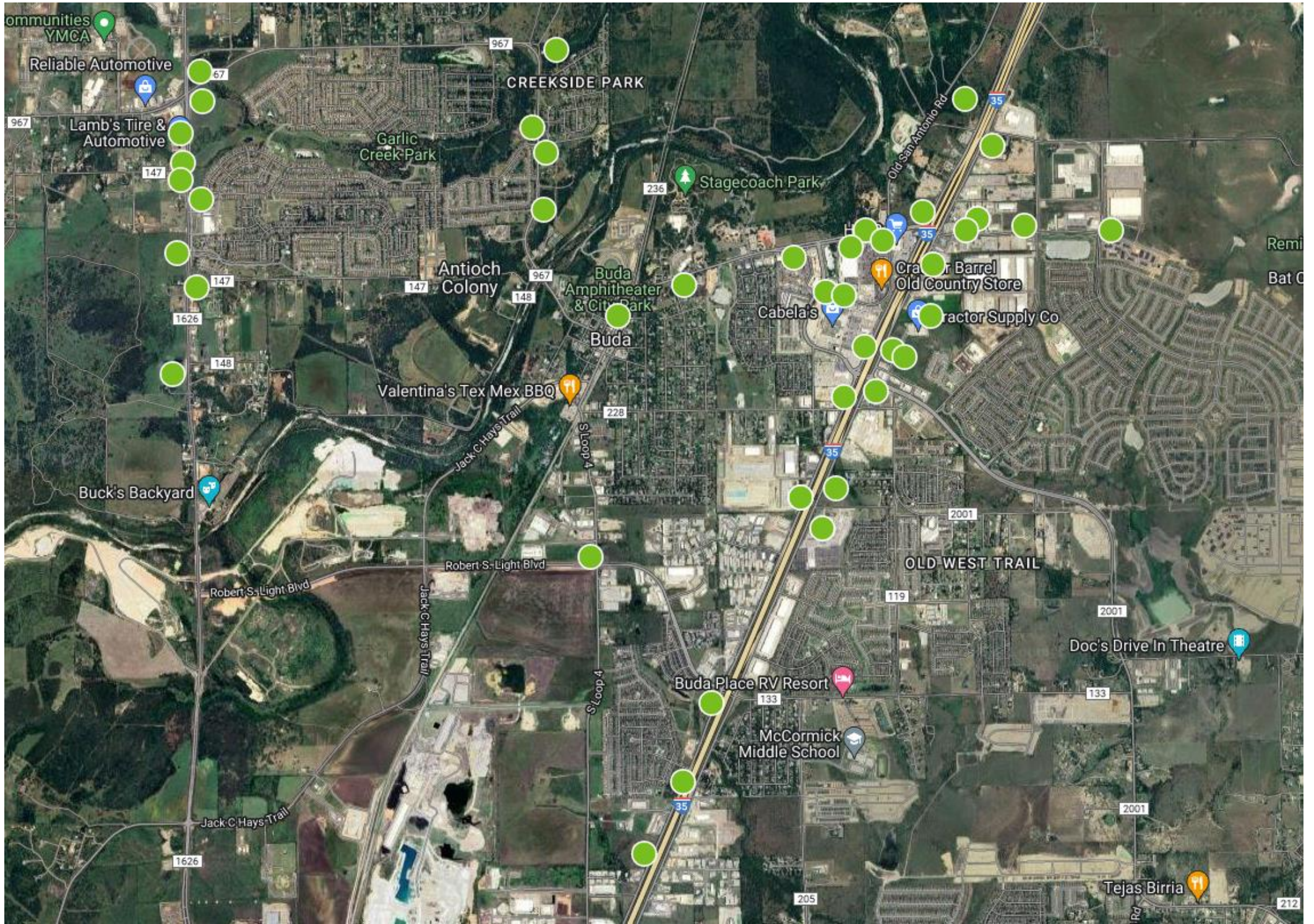
# Current Real Estate Overview





DISCOVER

# Focus Opportunities for Recruitment

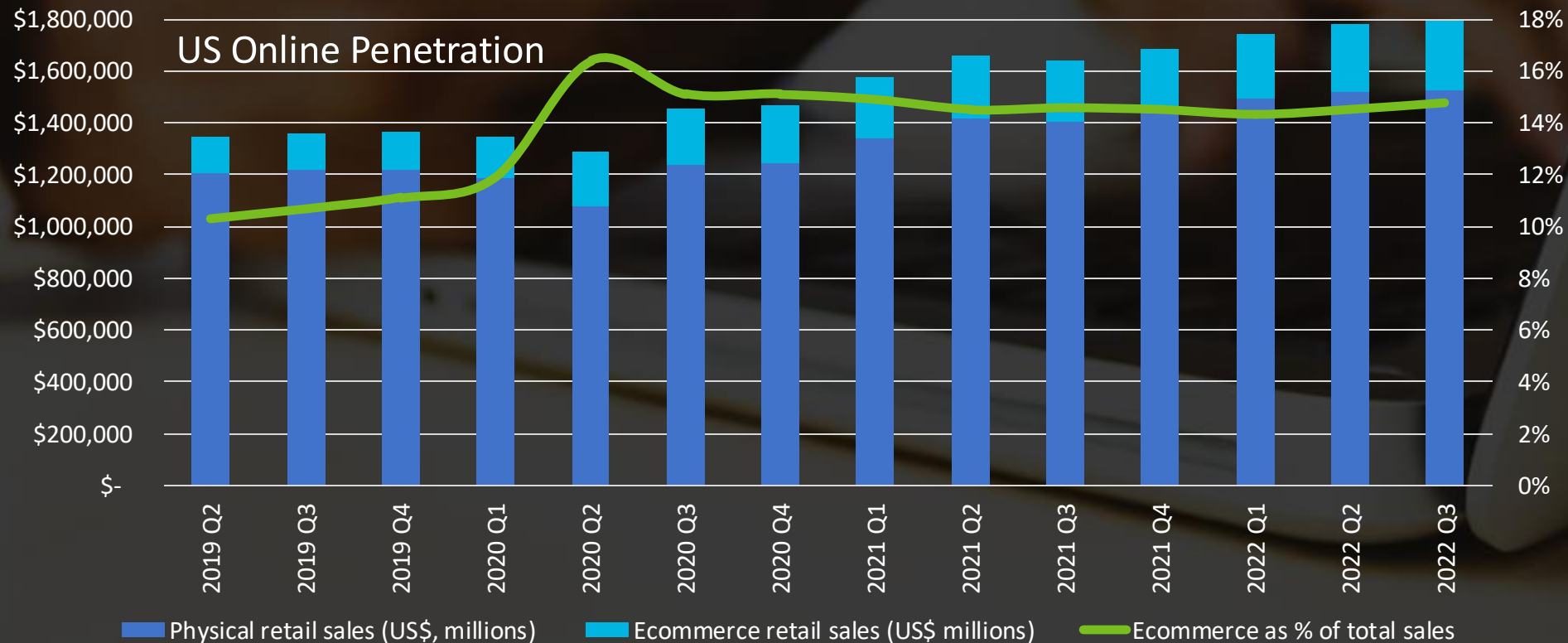




## TRENDS

# E-Commerce

Online sales have increased dramatically with the advent of new technology. However, e-commerce is still a relatively small portion of all retail sales, capturing 16.4% of sales in 2022. More importantly, we need to recognize the trend and be aware of retailer reactions.



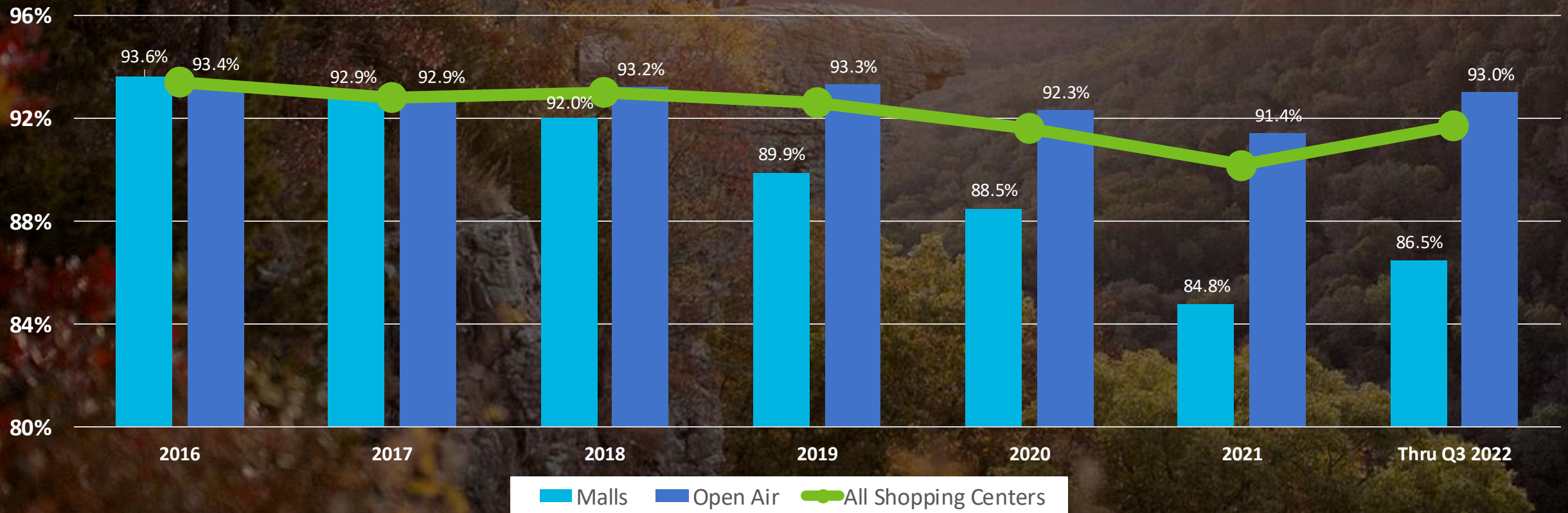
Nothing but Growth Ahead  
for E-Commerce



RETAIL TRENDS

# Are we over retailled in America?

RESILIENCE





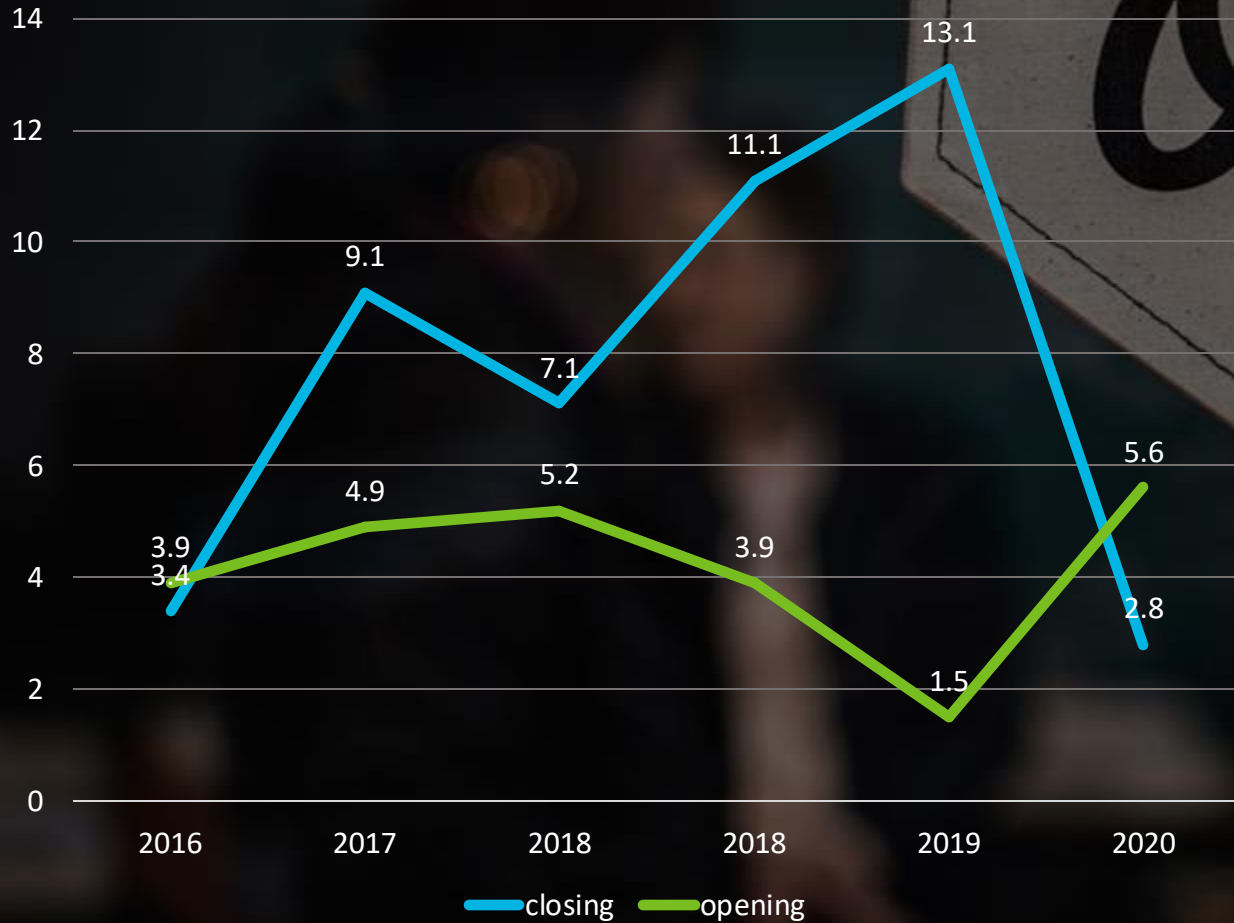
# Openings & Closings

## Announcements

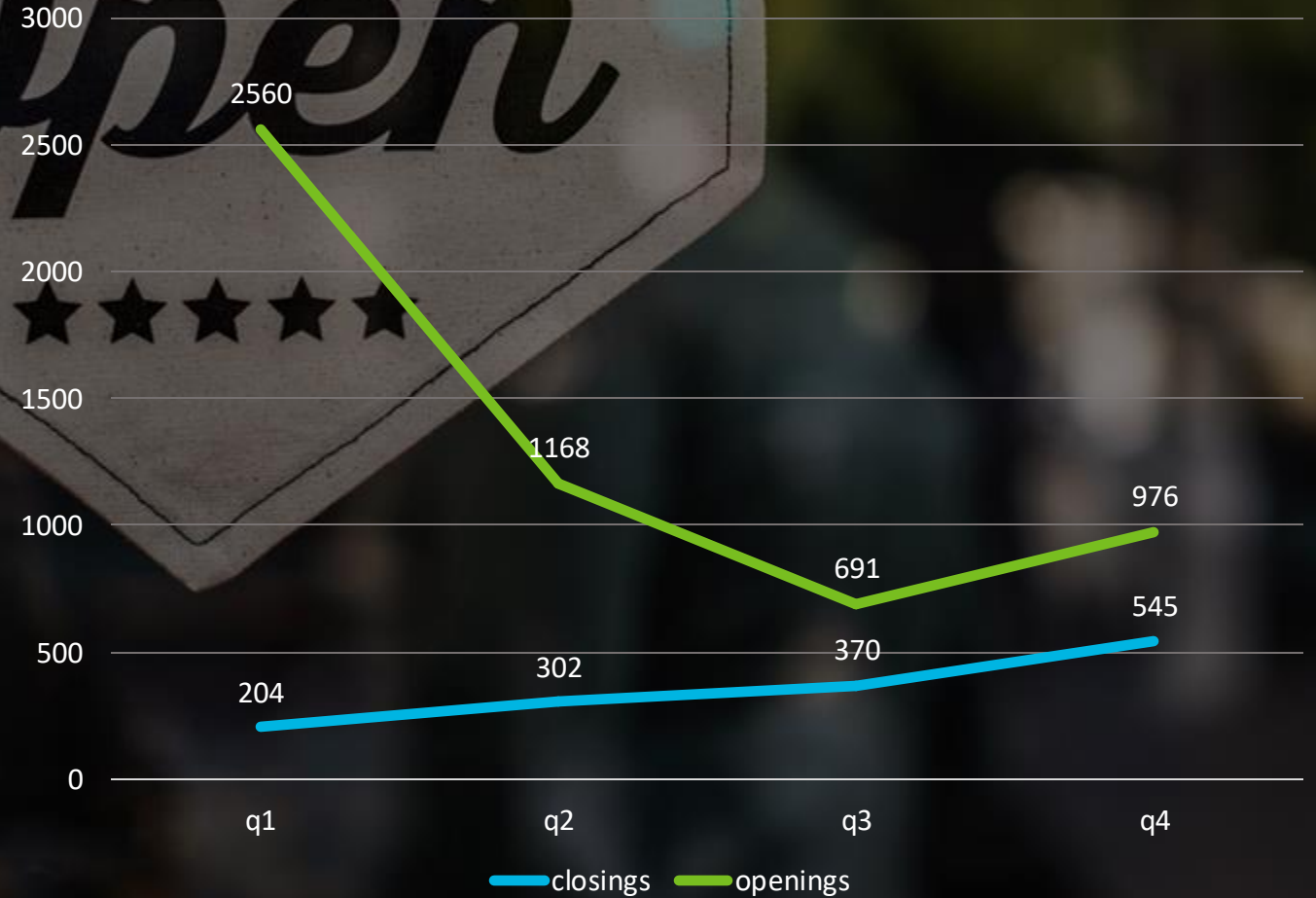
In 2022, the total announced openings of 5,395 was on par with 2021. However, total closings were only 50% of the 2021 level.



By Year: 2016-2021 (#k)



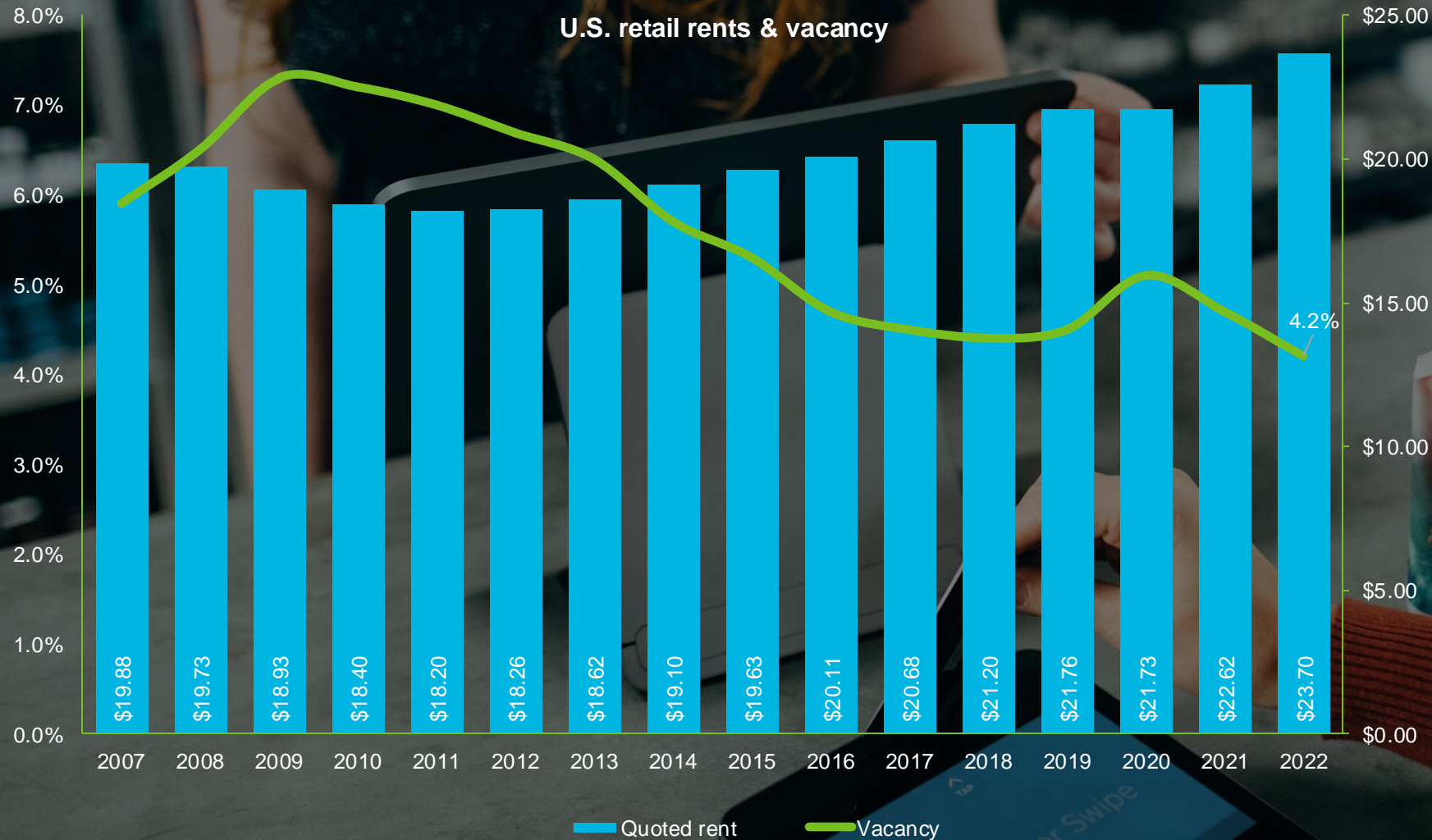
2022





## RETAIL TRENDS

# Vacancy



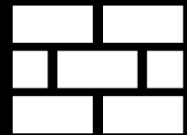
Strong absorption throughout 2021 and 2022 pushes vacancy down to 4.2%, returning to pre-pandemic levels.

Deliveries remain relatively low which has helped vacancy rates from rising sharply.



TRENDS

# Omni-Channeling



Bricks

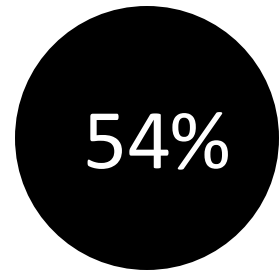


Clicks

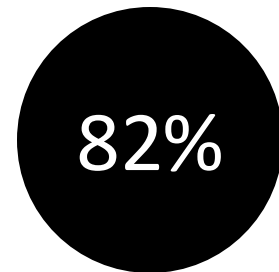


TRENDS

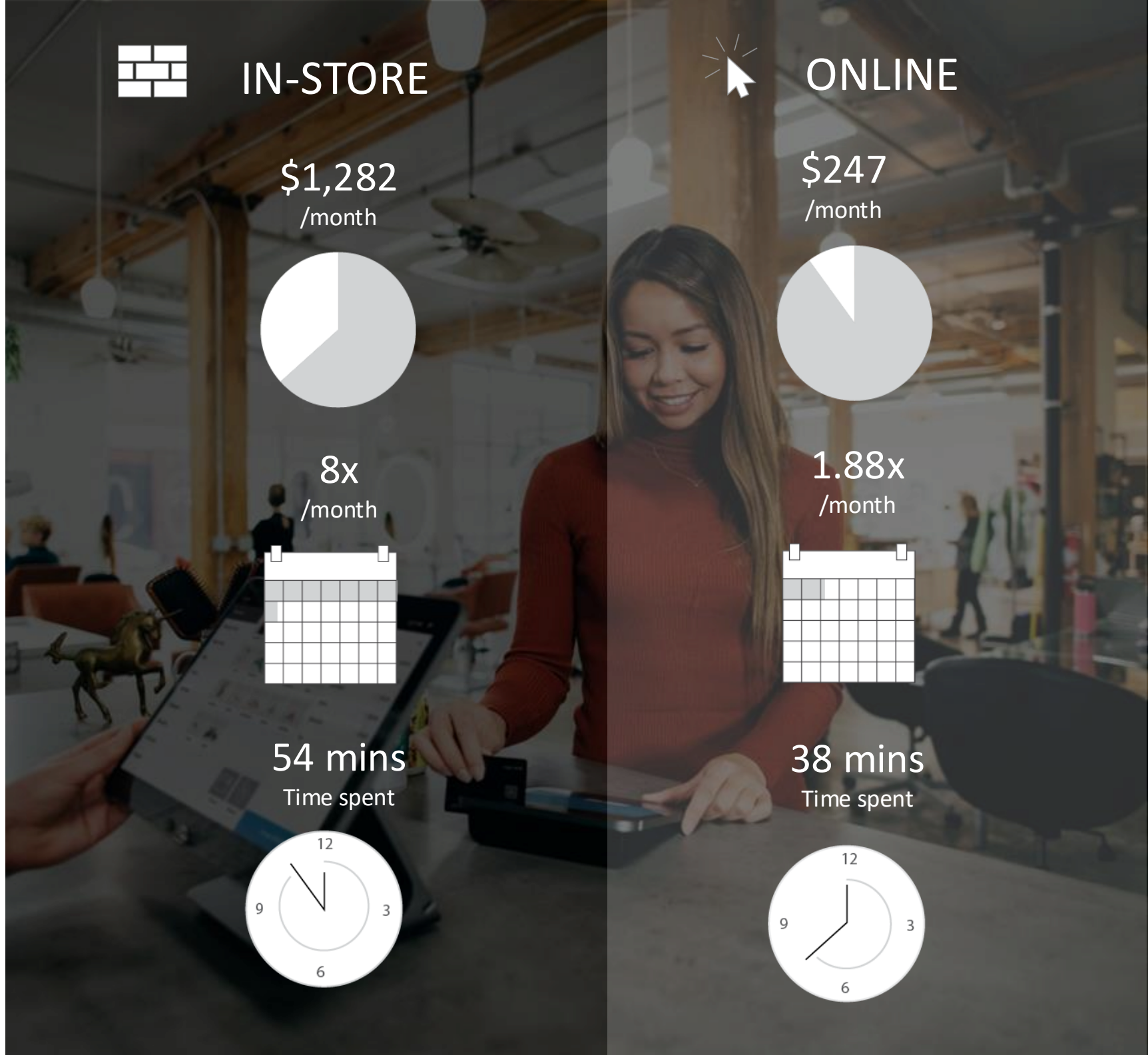
# Consumer Purchasing



of consumers prefer to shop in-store



want to 'view-and-touch' before they buy



IN-STORE

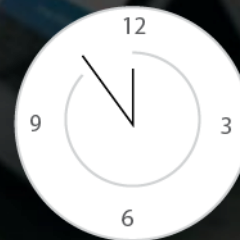
\$1,282  
/month



8x  
/month

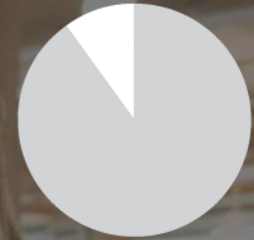


54 mins  
Time spent

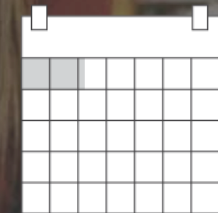


ONLINE

\$247  
/month



1.88x  
/month



38 mins  
Time spent



RESEARCH

# Who we partner with

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DISCOVER

# Research



Where does all this information come from?





retail strategies

THANK YOU

Buda, TX

