

Schulenburg, Texas

Your Research



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where does all this information come from?

here are a few of the demographic data sources used









































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You have at your disposal thousands of variables from population and household incomes to spending patterns by retail category.

The information covered in this document represents the key highlights for your community.

The following are the highlights from a data and analytic perspective.

Demographic Overview

Cell Phone Tracking Data

Customized Trade Area Analysis

Lifestyle Segmentation

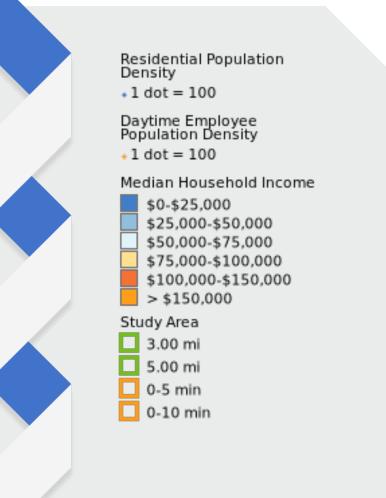
Retail Gap Analysis

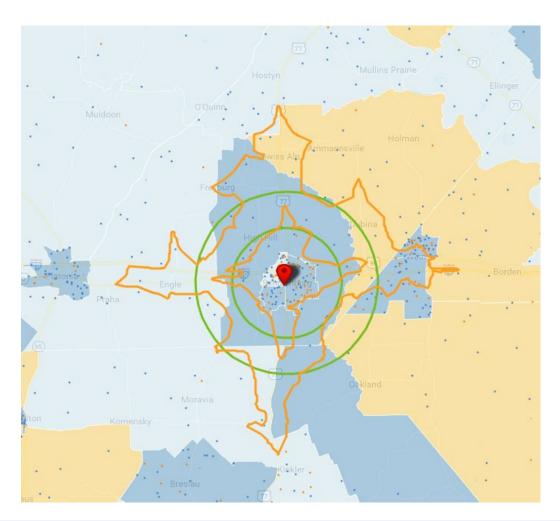
Peer Analysis

Discover









Discover: Mile Radius and Drive Time Demographics



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	3,646	4,441	10,143	3,339	6,172	11,130
Number of Households	1,427	1,763	4,133	1,298	2,451	4,460
Projected Annual Growth (5 YR)	2.33%	2.60%	2.57%	2.16%	2.64%	2.72%
Median HH Income 2016	\$41,488	\$43,546	\$50,263	\$41,183	\$45,537	\$48,297
Current Year Average Age	41.7	42.4	43.6	41.5	42.4	43.1
Average Home Value	\$178,354	\$206,958	\$229,780	\$165,649	\$205,409	\$219,119
Current Year % Bachelor's Degree	15%	15%	16%	15%	16%	15%
Daytime Population	4,655	5,089	9,865	4,494	8,063	11,674
Labor Force	2,865	3,531	8,234	2,612	4,931	8,990



Mobile Data Collection

The Service uses data collected from mobile phone users who have agreed within their apps and phone settings to enable location information. The Service includes mobile phone data with latitude/longitude points that are accurate to approximately 20 feet. Data inputs are updated as quickly as every 24-hours. The data shown includes shopper who visited the defined location during the designated time period.

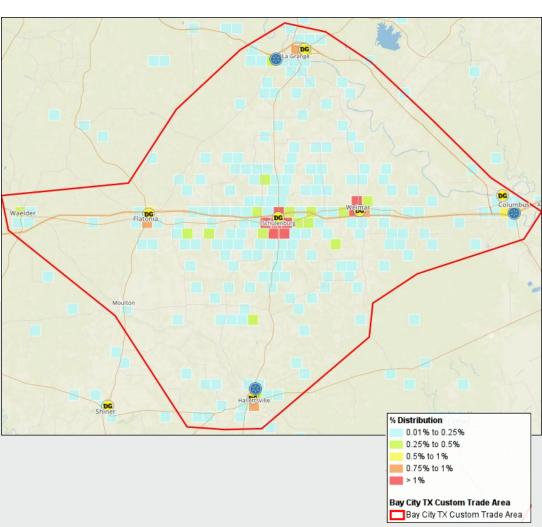


The location tracked was

Dollar General

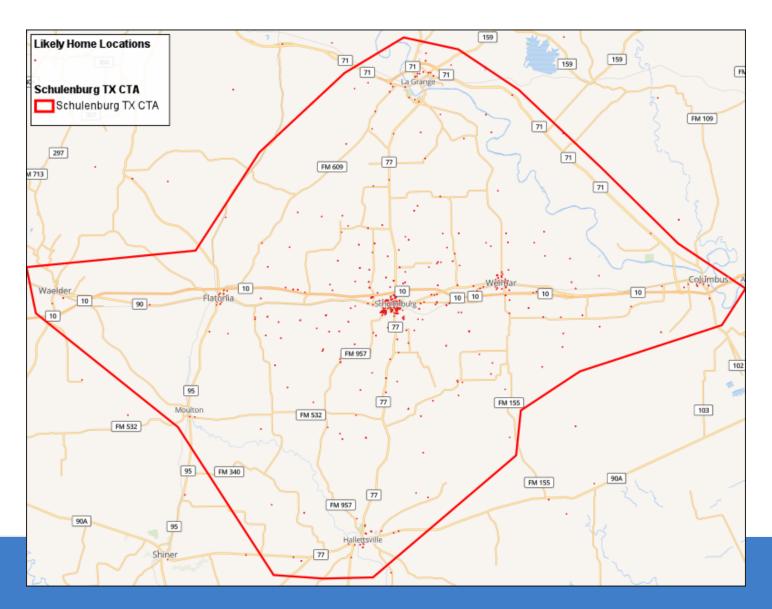
for the time period of January 1, 2018 – January 1, 2019

This tool is intended to support the trade area but does not solely define the trade area.



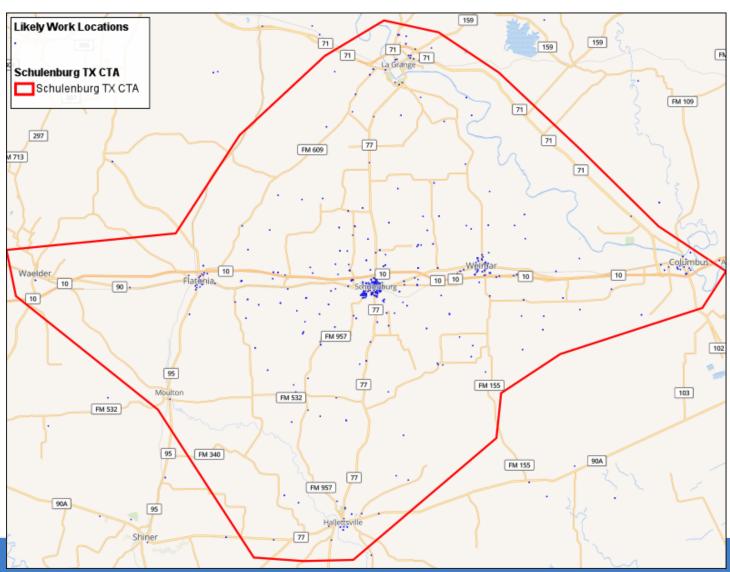
Discover: Custom Trade Area and Likely Home Locations





Discover: Custom Trade Area and Likely Work Locations







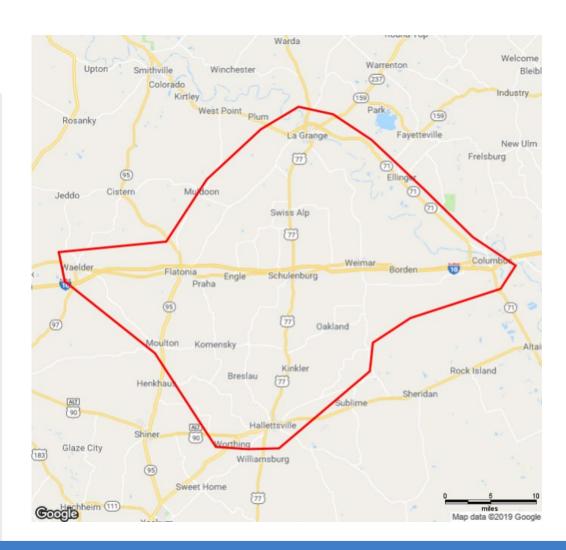
Customized Trade Area

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 area is a start.

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 a series of drive times, mobile data analysis, geographic boundaries and proximity to neighboring shopping destinations.

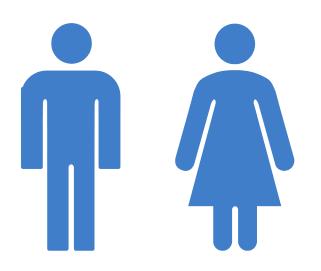
Each retailer will analyze their own trade area based on their existing stores, their competition and site selection criteria.





37,036
2018 estimated population

37,774 projected 2023 population



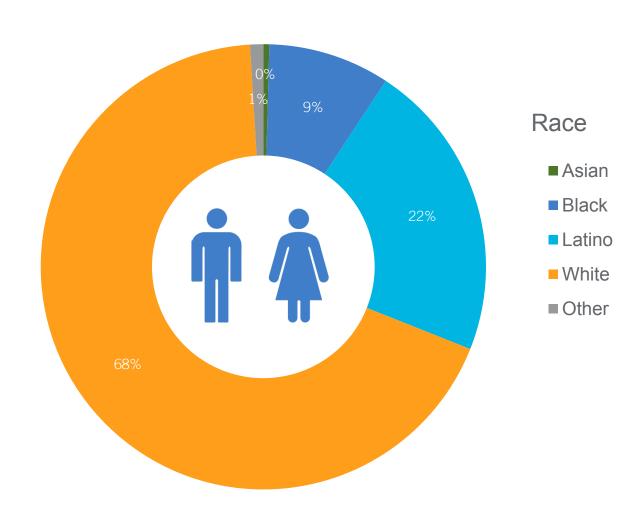
2.0% projected growth rate 2018-2023

41

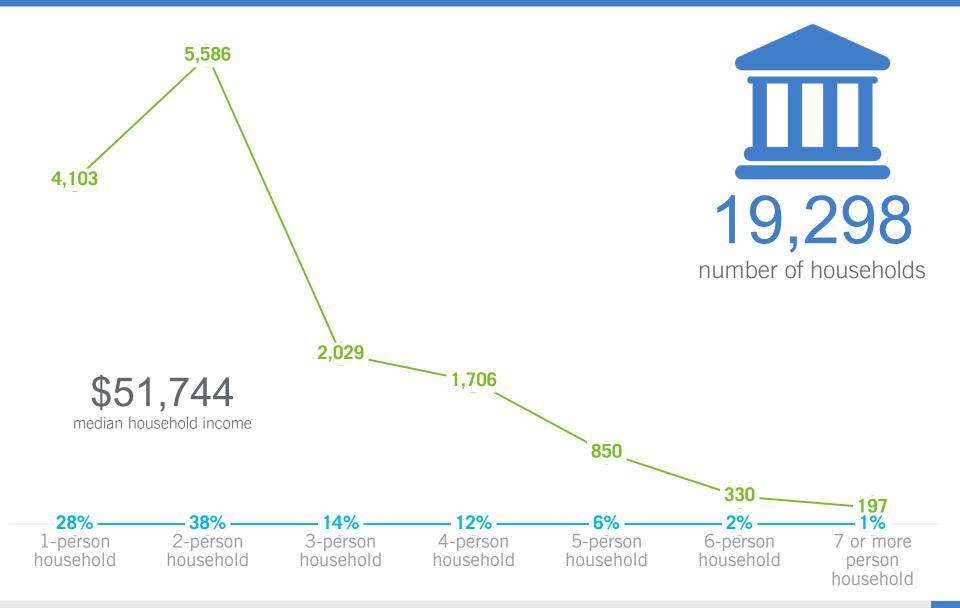
44

male average age female average age



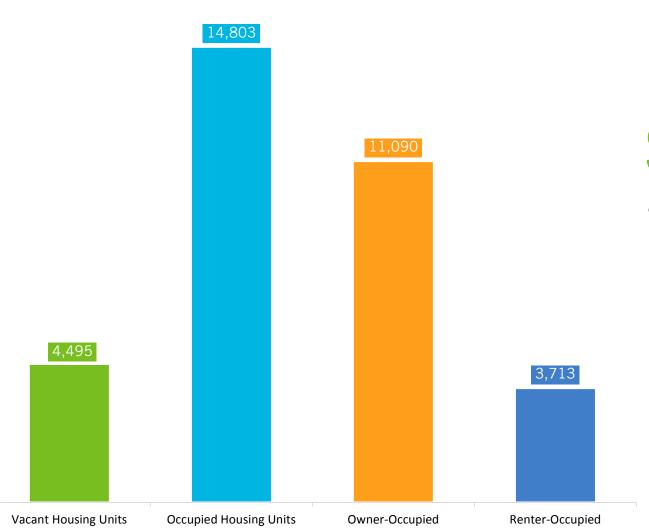






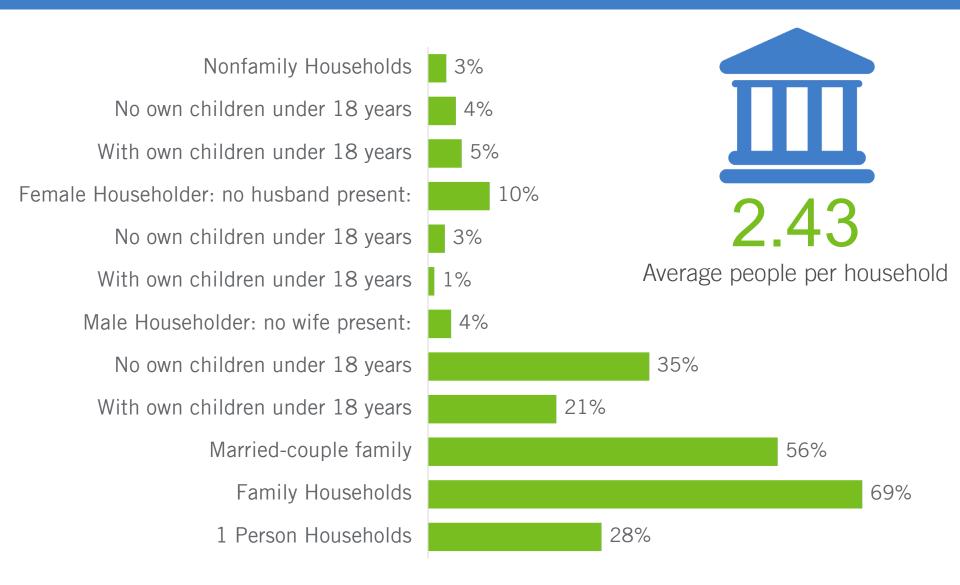


2018 ESTIMATED HOUSING UNITS BY TENURE







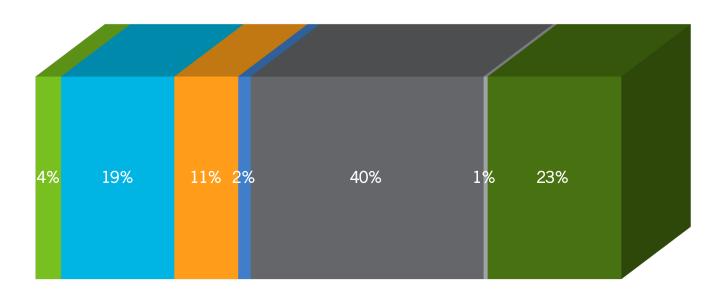




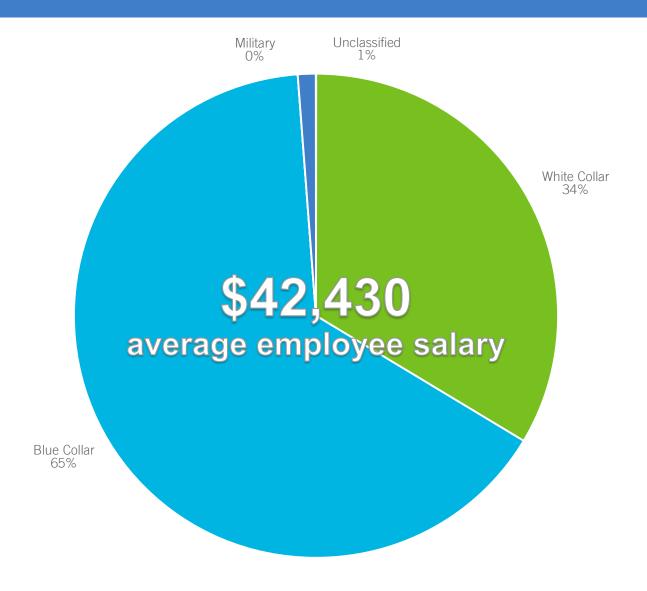
DAYTIME POPULATION

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

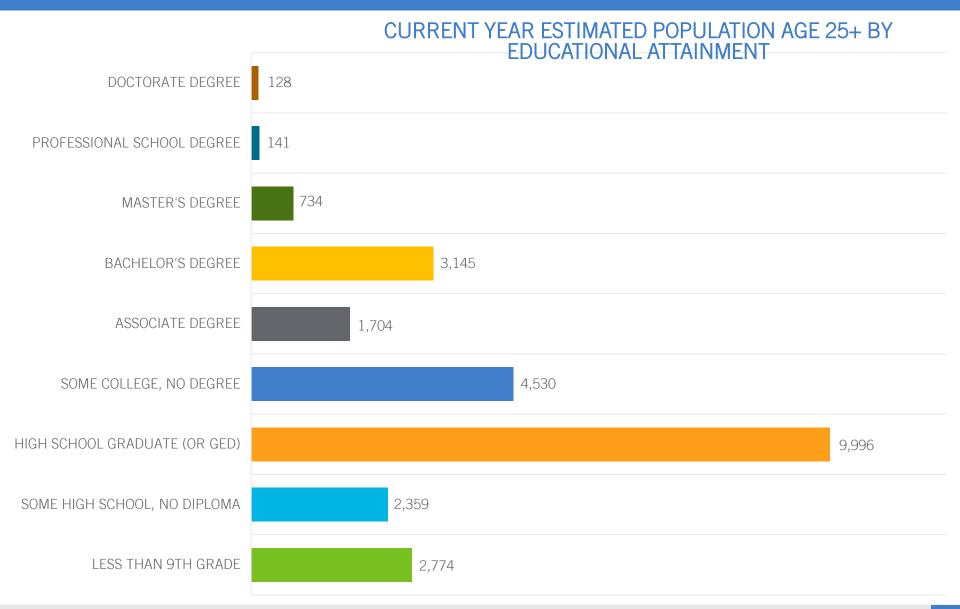
37,543 daytime population





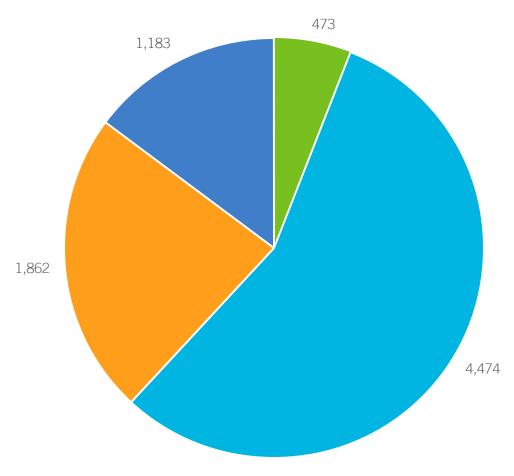








CURRENT YEAR ESTIMATED POPULATION BY ENROLLMENT



- Nursery school/preschool
- High School

- Kindergarten/Elementary School
- College/Graduate/Professional school

Discover: Research & Analytics



Lifestyle Reports allow BIG DATA to be summed up into a simple narrative on the personality of the majority of your households.

When asked to describe "Who is Schulenburg, TX?", often times the community leadership describes themselves rather than the dominate personality of the area. Understanding consumer shopping patterns based on personality allow Retail strategies to better align the retail prospects with the purchasing patterns.

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, town house, 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.



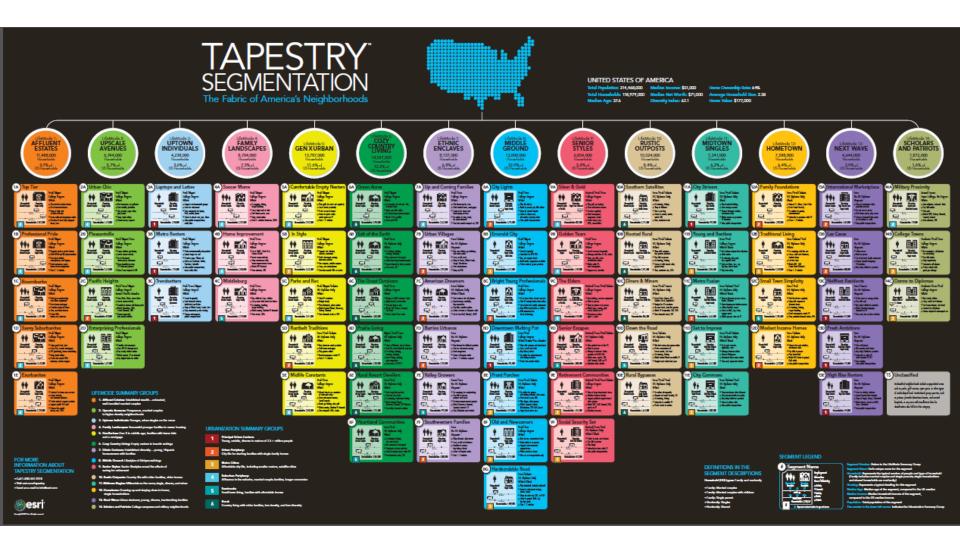
ESRI Tapestry Segmentation

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.

^{*}Tapestry Segmentations available on Flash drive

Discover: Research & Analytics

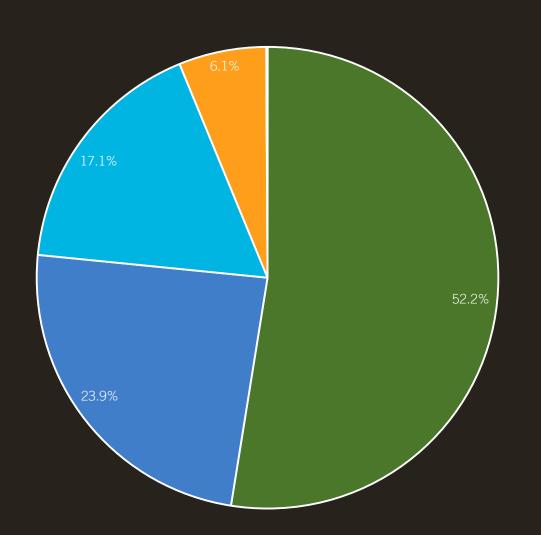




Discover: Research & Analytics



5 Mile Radius - Dollar General



- Heartland Communities (6F)
- Prairie Living (6D)
- ■Rural Bypasses (10E)
- ■Rural Resort Dewllers (6E)

TAPESTRY
SEGMENTATION
The Fabric of America's Neighborhoods



LifeMode Group: Cozy Country Living

Heartland Communities



Households: 2,850,600

Average Household Size: 2.39

Median Age: 42.3

Median Household Income: \$42,400

WHO ARE WE?

Well settled and close-knit, Heartland Communities are semirural and semiretired. These older householders are primarily homeowners, and many have paid off their mortgages. Their children have moved away, but they have no plans to leave their homes. Their hearts are with the country; they embrace the slower pace of life here but actively participate in outdoor activities and community events. Traditional and patriotic, these residents support their local businesses, always buy American, and favor domestic driving vacations over foreign plane trips.

OUR NEIGHBORHOOD

- Rural communities or small towns are concentrated in the Midwest, from older Rustbelt cities to the Great Plains.
- Distribution of household types is comparable to the US, primarily (but not the majority) married couples, more with no children, and a slightly higher proportion of singles (Index 112) that reflects the aging of the population.
- Residents own modest, single-family homes built before 1970.
- They own one or two vehicles; commutes are short (Index 82).

SOCIOECONOMIC TRAITS

- Retirees in this market depress the average labor force participation rate to less than 60% (Index 94), but the unemployment rate is comparable to the US.
- More workers are white collar than blue collar; more skilled than unskilled.
- The rural economy of this market provides employment in the manufacturing, construction, utilities, healthcare, and agriculture industries.
- These are budget savvy consumers; they stick to brands they grew up with and know the price of goods they purchase. Buying American is important.
- Daily life is busy, but routine. Working on the weekends is not uncommon.
- Residents trust TV and newspapers more than any other media.
- Skeptical about their financial future, they stick to community banks and low-risk investments.



MARKET PROFILE (Consumer preferences are estimated from data by GfK MRI)

- Traditional in their ways, residents of *Heartland Communities* choose to bank and pay their bills in person and purchase insurance from an agent.
- Most have high-speed Internet access at home or on their cell phone but aren't ready to go paperless.
- Many residents have paid off their home mortgages but still hold auto loans and student loans. Interest checking accounts are common.
- · To support their local community, residents participate in public activities.
- Home remodeling is not a priority, but homeowners do tackle necessary maintenance work on their cherished homes. They have invested in riding lawn mowers to maintain their larger yards.
- · They enjoy country music and watch CMT.
- · Motorcycling, hunting, and fishing are popular; walking is the main form of exercise.
- · To get around these semirural communities, residents prefer domestic trucks or SUVs.

HOUSING

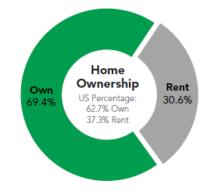
Median home value is displayed for markets that are primarily owner occupied; average rent is shown for renter-occupied markets. Tenure and home value are estimated by Esri. Housing type and average rent are from the Census Bureau's American Community Survey.



Typical Housing: Single Family

Median Value: \$95,700

US Median: \$207,300



POPULATION CHARACTERISTICS

Total population, average annual population change since Census 2010, and average density (population per square mile) are displayed for the market relative to the size and change among all Tapestry markets. Data estimated by Esri.

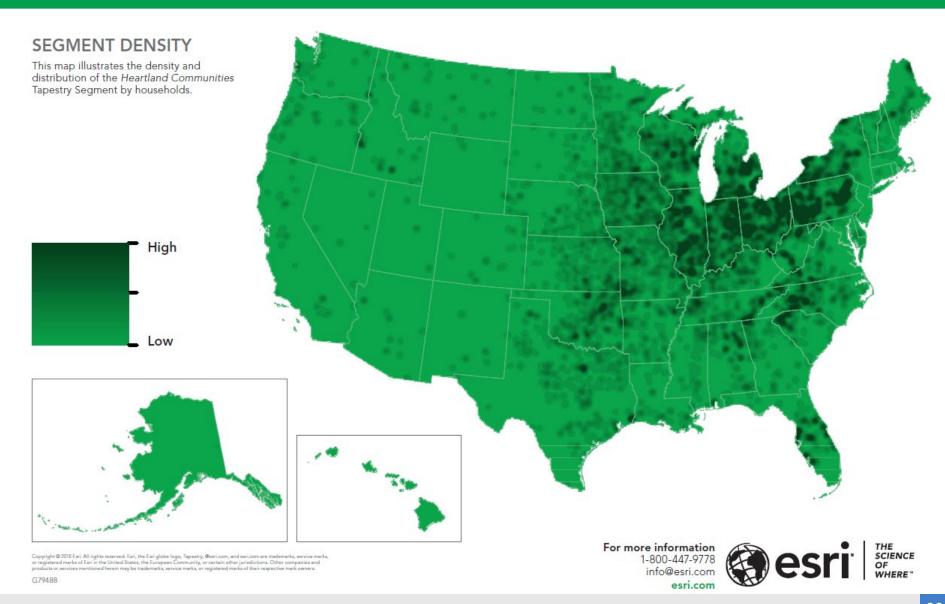


ESRI INDEXES

Esri developed three indexes to display average household wealth, socioeconomic status, and housing affordability for the market relative to US standards.









LifeMode Group: Cozy Country Living

Prairie Living



Households: 1,323,200

Average Household Size: 2.51

Median Age: 44.4

Median Household Income: \$54,300

WHO ARE WE?

Prairie Living is Tapestry Segmentation's most rural market, comprising about 1.2 percent of households, located mainly in the Midwest, with a predominance of self-employed farmers. These agricultural communities are not diverse, dominated by married-couple families that own single-family dwellings and many vehicles. Median household income is similar to the US, and labor force participation is slightly higher. Faith is important to this hardworking market. When they find time to relax, they favor outdoor activities.

OUR NEIGHBORHOOD

- About four-fifths of households are owner occupied.
- Dominant household type is married-couples with no children.
- Most are single-family homes (87%) built before 1980; a higher proportion were built before 1940 (Index 218).
- Higher percentage of vacant housing units is at 16.5% (Index 146).
- Most households own 2 or 3 vehicles; this is the highest ranked market for owning 4 or more vehicles.

SOCIOECONOMIC TRAITS

- More than half have completed some college education or hold a degree.
- At 2.9%, the unemployment rate is almost less than half the US rate.
- Labor force participation rate slightly higher at 65%.
- Wage and salary income for 72% of households plus self-employment income for 23% (Index 217).
- Faith and religion are important to these residents.
- Tend to buy things when they need them, rather than when they want them or to be trendy.
- · Somewhat resistant to new technology.
- Creatures of habit when purchasing food items.



MARKET PROFILE (Consumer preferences are estimated from data by GfK MRI)

- Many own a truck, riding lawn mower, and ATV/UTV and have a satellite dish.
- They purchased plants and seeds in the past year for their vegetable garden, where their tiller comes in handy.
- They favor banking in person, have noninterest checking accounts, invest in CDs (more than 6 months), and have term/whole life insurance.
- · They are pet owners.
- Leisure activities include fishing, hunting, boating, camping, and attending country music concerts.
- Residents prefer to listen to faith and inspirational, as well as country music on the radio.
- They read the local newspaper as well as home service, and fishing/hunting magazines.
- They contribute to religious organizations and belong to religious clubs.
- Walmart is a favorite shopping stop; Subway is a favorite eating spot.

HOUSING

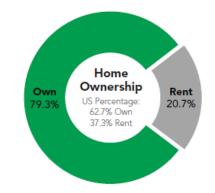
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Typical Housing: Single Family

Median Value: \$139,800

US Median: \$207.300



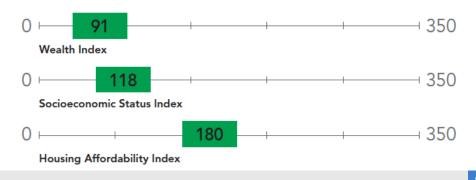
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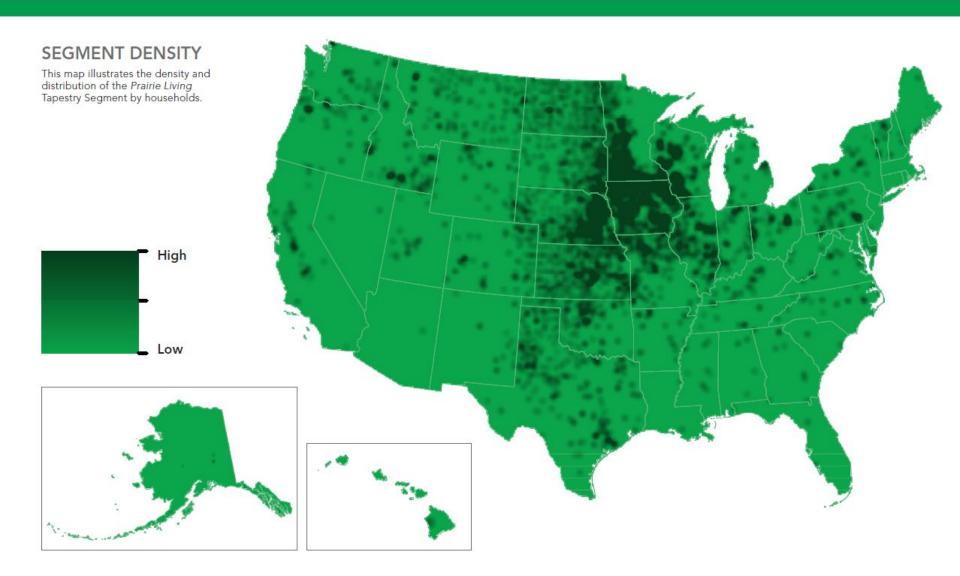


ESRI INDEXES

Esri developed three indexes to display average household wealth, socioeconomic status, and housing affordability for the market relative to US standards.







Discover



Understanding the 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 (surplus)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 the 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 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 Bureau of Labor Statistics (BLS). The consumer demand data by 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 with proper analysis 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 or more on the category than the actual dollar amounts.

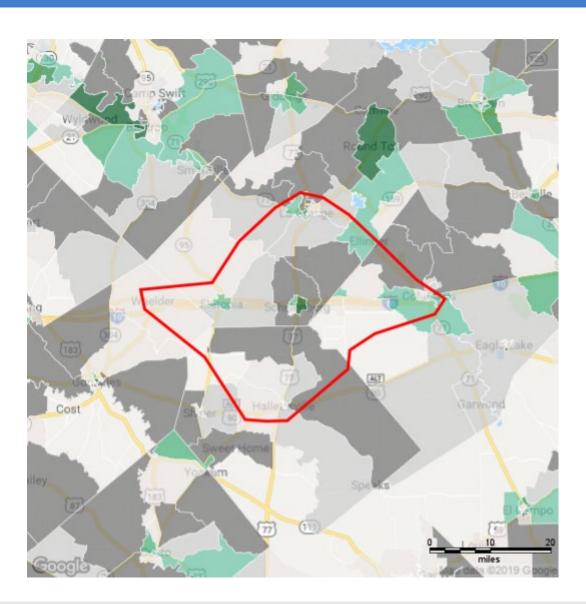
Discover: Total Market Supply (Custom Trade Area)





Total Market Supply \$574,556,458

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.



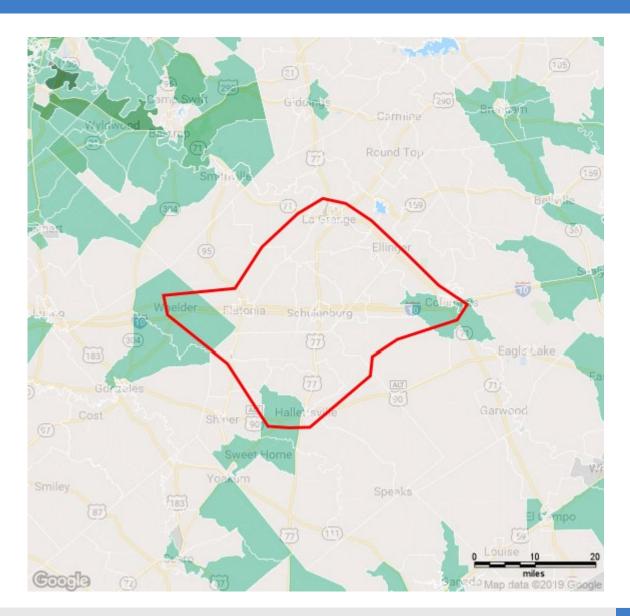
Discover: Total Market Demand (Custom Trade Area)





Total Market Demand \$595,300,560

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.



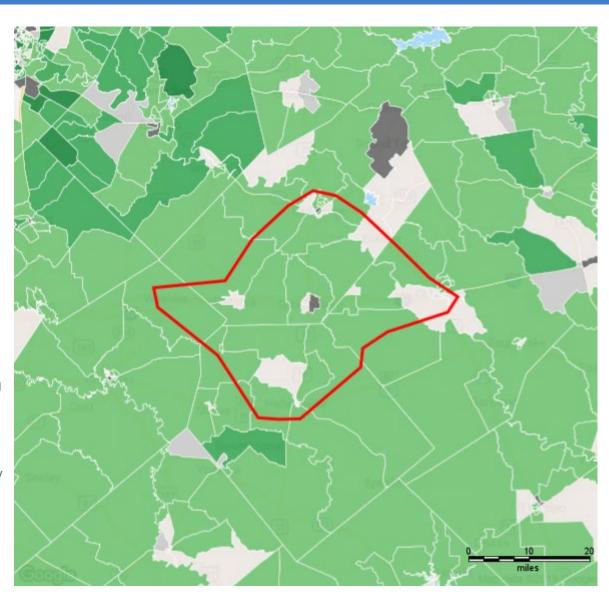
Discover: Opportunity Gap (Custom Trade Area)





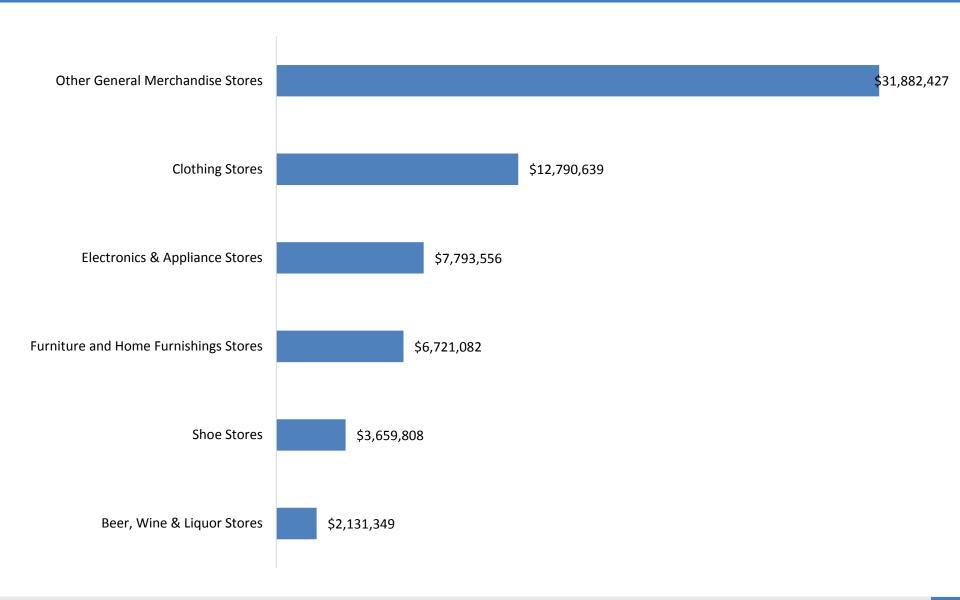
Total Market Surplus of \$20,744,103

This means more people purchase items outside of the defined trade area than in the 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: Leakage (Custom Trade Area)





Discover: Peer Analysis

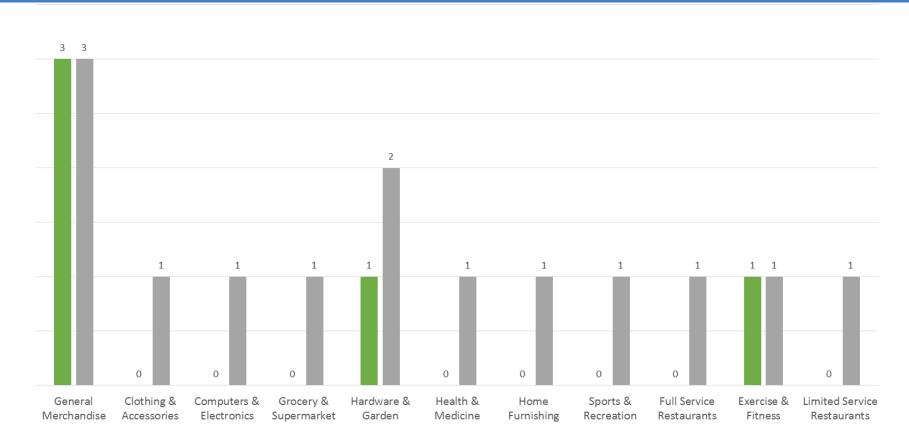


Dollar General 10 - Minute Drive Time

City	State	Residential Pop	Employed Daytime Pop	Median HH Income	Market Supply
Schulenburg	TX	6,172	8,063	\$45,537	\$ 187,337,610
Breckenridge	TX	6,515	7,362	\$44,726	\$106,209,819
Eastland	TX	6,404	8,564	\$40,574	\$125,625,273
Yoakum	TX	7,726	7,890	\$47,239	\$116,300,459
Caldwell	TX	6,926	7,632	\$54,002	\$153,557,404
Bowie	TX	7,812	7,842	\$46,041	\$117,381,758
Fairfield	TX	7,668	7,565	\$49,012	\$132,241,714

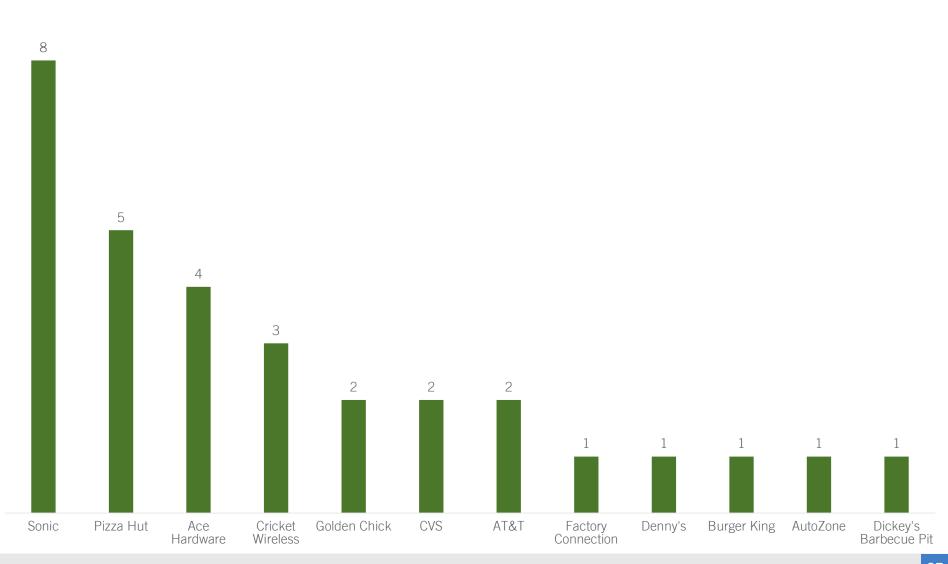
Discover: Peer Analysis







PEER RETAILERS



Eye in the Sky Analysis



Real Estate Analysis



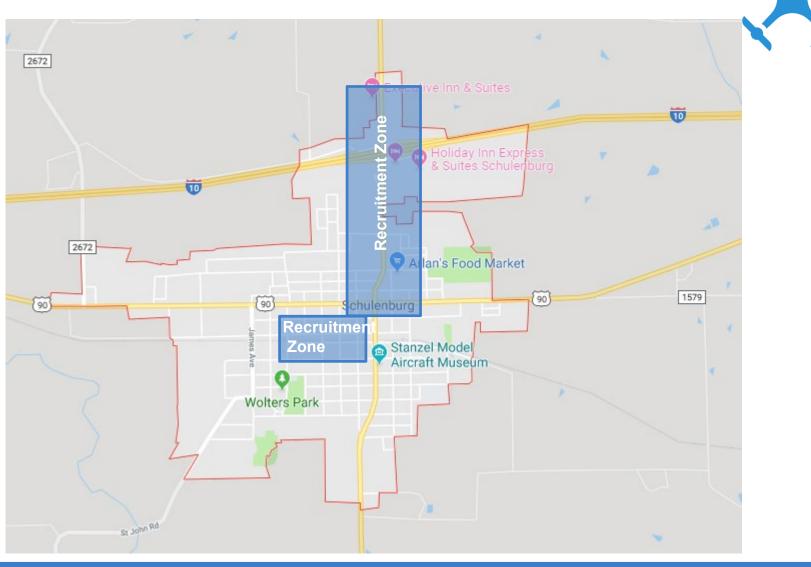
Purpose:

To identify and record the primary real estate opportunities within the market.

This analysis is performed by licensed real estate professionals,

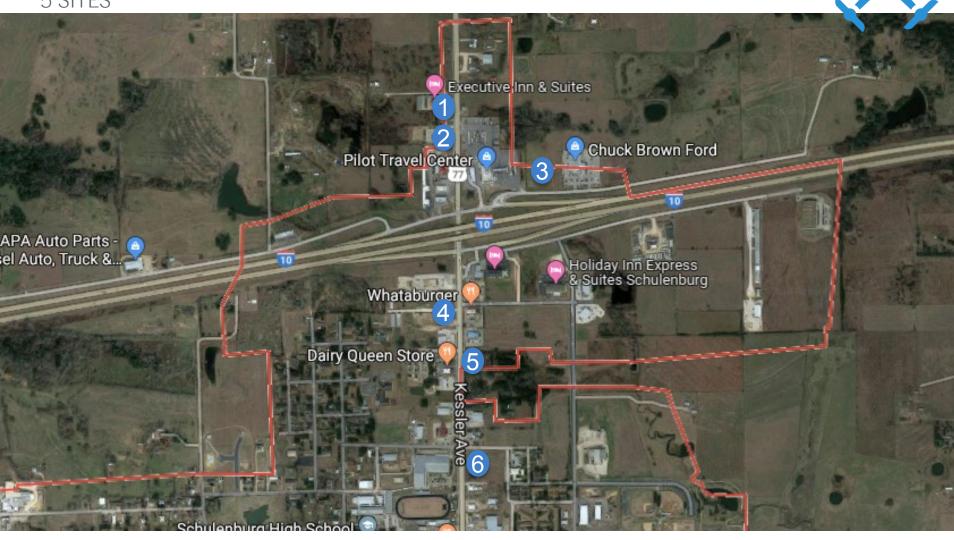
Retail Academy professionals have reviewed the market's real estate to identify underexposed real estate assets. No retail expansion can take place without the right piece of real estate. The following slides describe the primary underexposed real estate sites and development zones in the market.

Focus Recruitment Zone Analysis



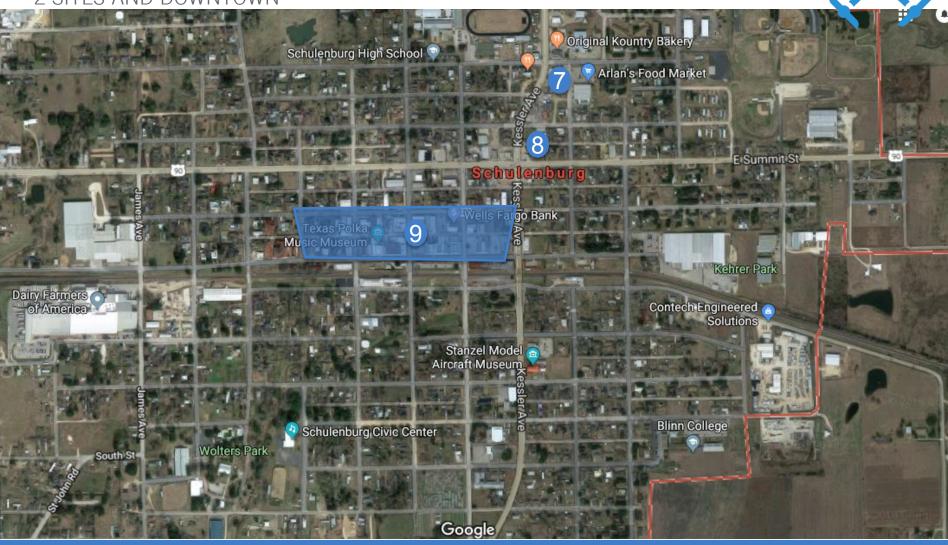
Focus Recruitment Zone 1 Analysis

5 SITES



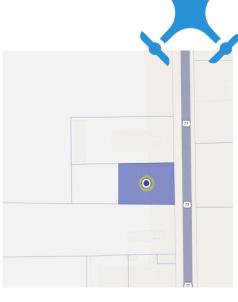
Focus Recruitment Zone 2 Analysis

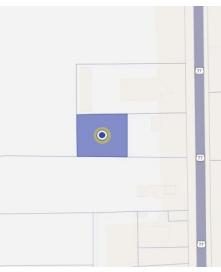
2 SITES AND DOWNTOWN



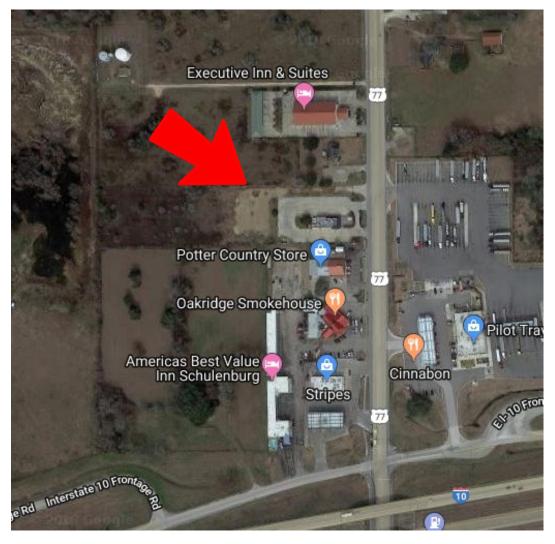
Property #1 | 1.8 Acres| 2 lots| Don Blansitt

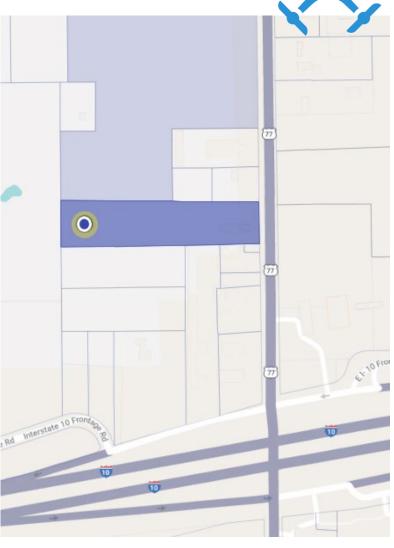






Property #2 | 3.89 acres| Golden Arch Ltd Ptshp

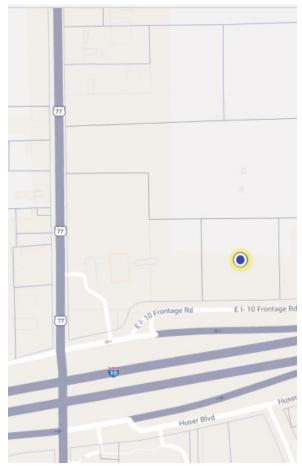




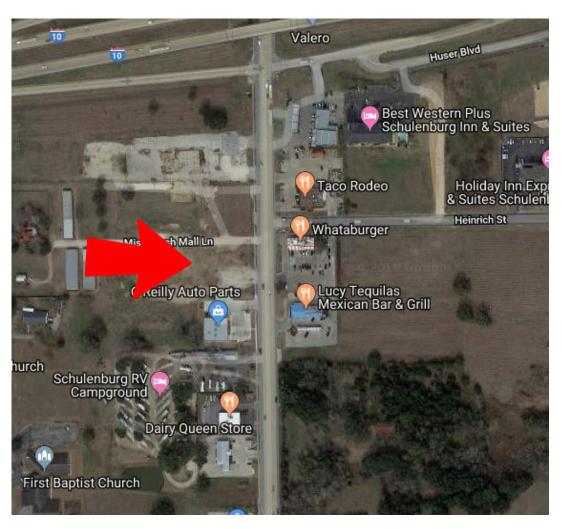
Property #3 | 6.62 acres | Lux Chas Est via Charles Lux

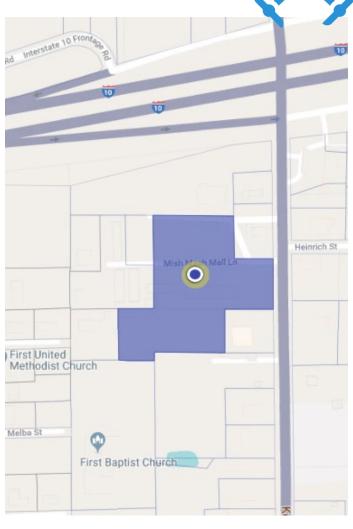






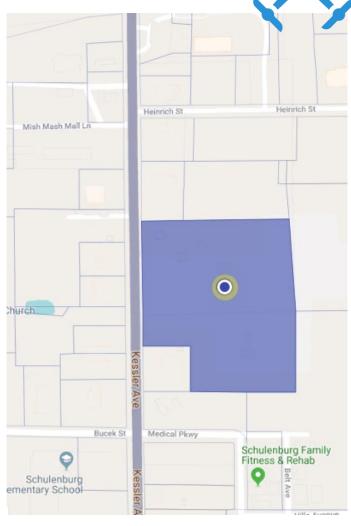
Property #4 | 2.32 acres | Balzer Feed Mills Inc



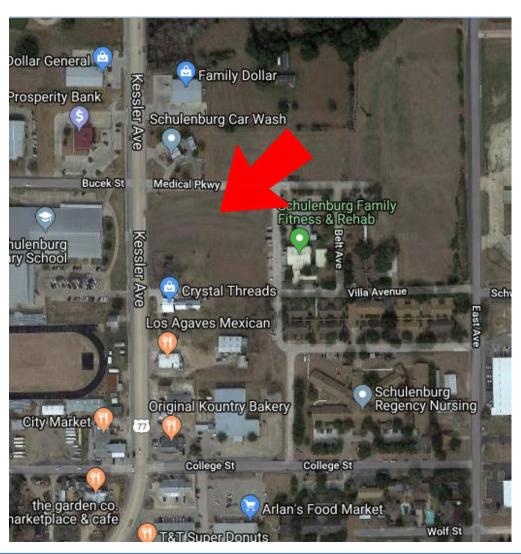


Property #5 | 9.35 acres | Helen Frances Balcar





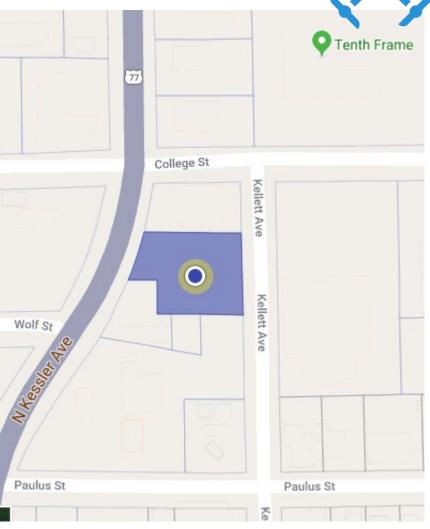
Property #6 | 1.93 acres | Greive Dolores





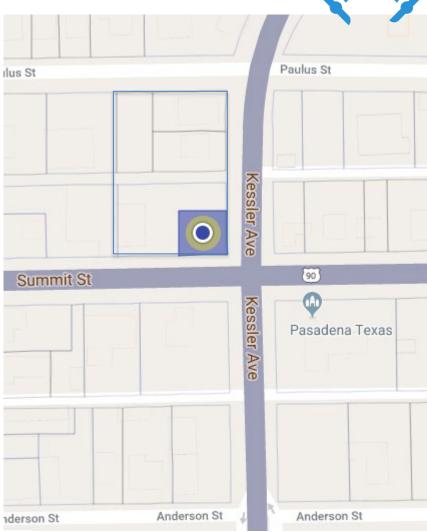
Property #7 | 0.46 acres, 8,400 sf | Bruce Lebeda





Property #8 | Assemble





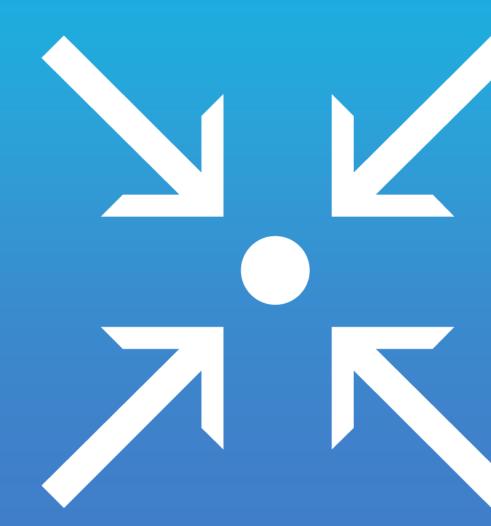
Downtown Schulenburg



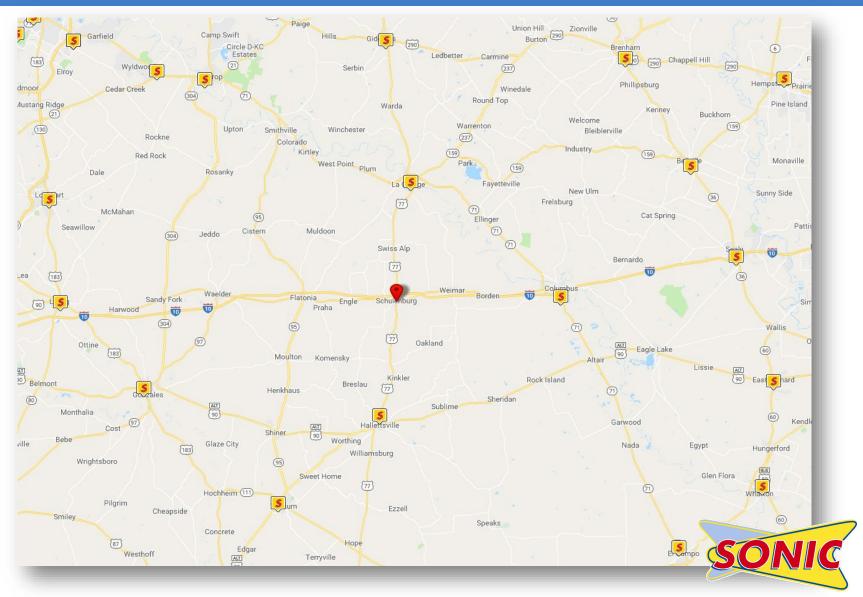














Sonic

Category:

Fast Food

Varies

Demographic Requirement

Radius Ring:

Demographic Requirement Minimum Population Requirement:

25,000+

Demographic Requirement Household Income Requirement:

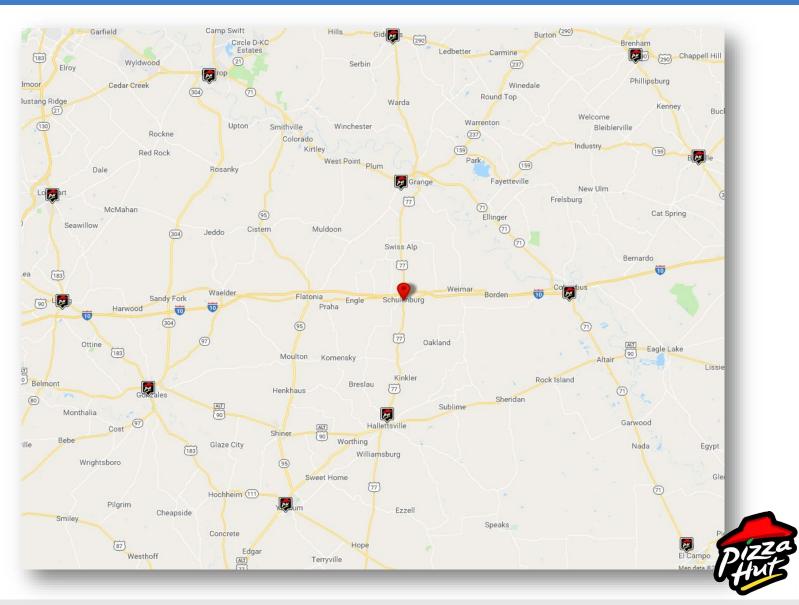
40,000+

Demographic Comments:

Preferred "A" Sites - Regional/Community/Neighborhood Shopping center out parcels at the far corner of a signalized intersection. Minimum of Two Point of Access from Two Streets.









Pizza Hut

Category: Restaurant (family)

Demographic Requirement Radius Ring:

Varies

Demographic Requirement Minimum Population Requirement:

15,000+

Demographic Comments:

Population: Freestanding w/ drive thru- 15000 in immediate TA; Inline/End Cap- 5000 in immediate TA.

Number of Square Feet and/or Acres:

900 SF

Comments on Desired Location:

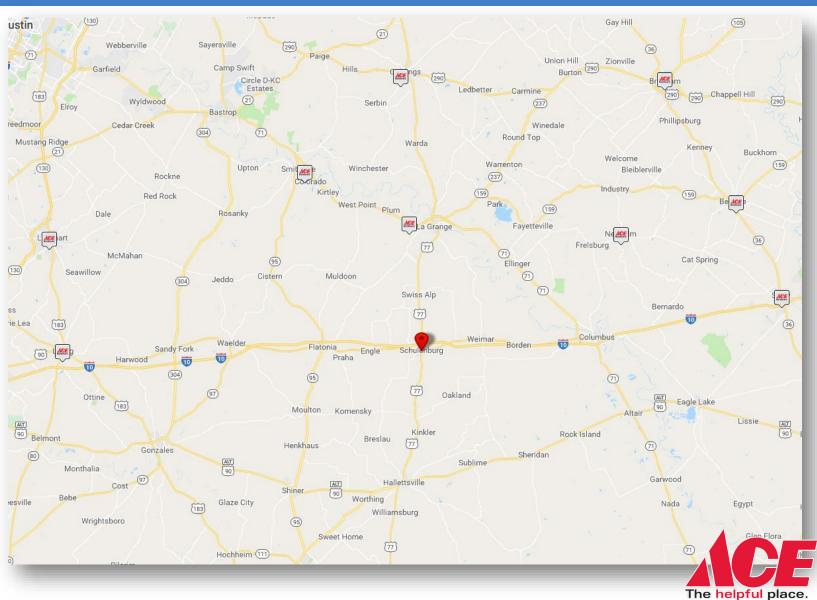
Inline/Endcap requires 900-1,500 SF. Freestanding requires 2,200-3,000 SF, parking 30-60, seating 50-90. EXPANSION INCLUDES ALL CONCEPTS COMBINED.

Facility Type:

Free Standing, Neighborhood Strip, Regional Strip, Special Strip









Ace Hardware

Category:

Hardware Store

Demographic Requirement Radius Ring:

Varies

Demographic Requirement Minimum Population Requirement:

6,500+

Demographic Requirement Household Income Requirement:

45,000+

Demographic Comments:

Prefers trade areas with at least 65% home ownership. 6500 or more households within 1.5 miles of site in primary trade area.

Number of Square Feet and/or Acres:

8,000 SF

Comments on Desired Location:

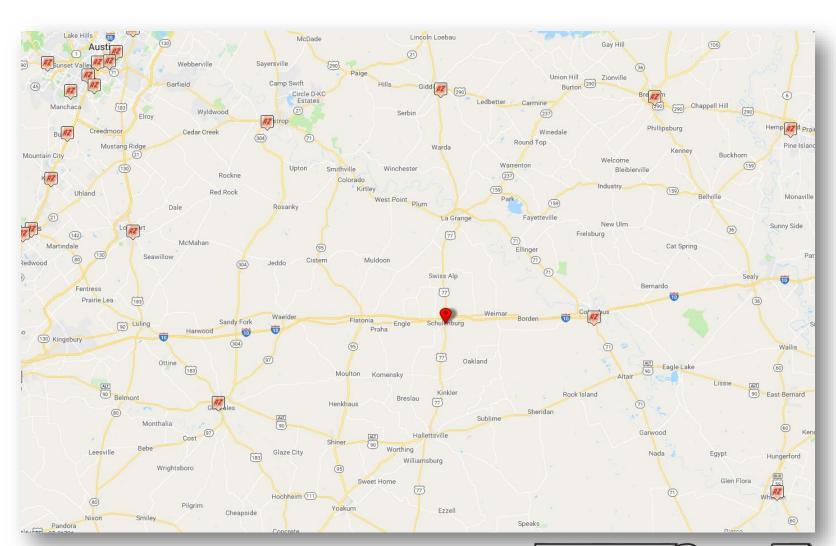
Retail Size: Optimum size is 8000-15000 sq ft. Smaller sizes will be considered if appropriate for the primary trade area, for example in very urban or rural markets. 10-15% of retail SF allocated for backroom, offices and restrooms. Parking: Minimum.

Facility Type:

Free Standing, Neighborhood Strip, Regional Strip, Special Strip











AutoZone

Category: | A

Auto Parts

Demographic Requirement

Radius Ring:

Varies

Number of Square Feet and/or

Acres:

7, 400 SF

Comments on Desired Location:

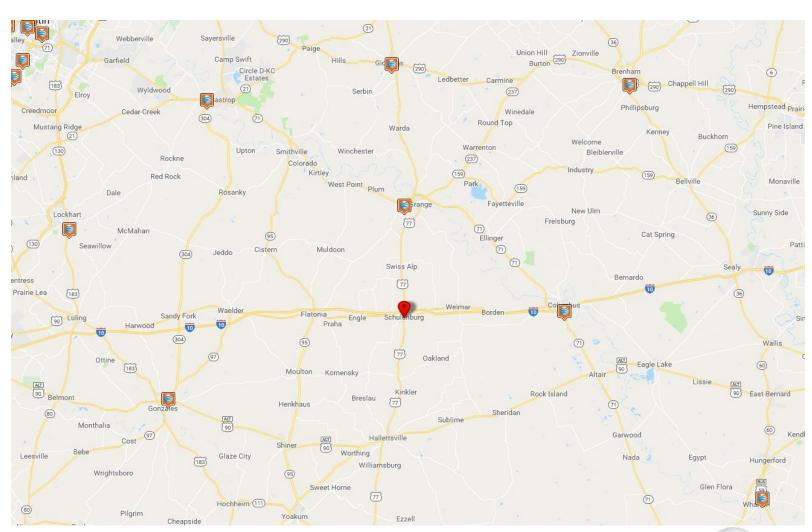
Requires upfront, high-impact locations with excellent visibility and access from adjacent streets. Must accommodate between 25 and 40 of uncongested, customer-friendly parking spaces. Land purchases are preferred (3/4 acre+); however. ground leases and

Facility Type:

Free Standing, Neighborhood Strip, Power Center, Regional Strip, Special Strip











AT&T

Category:

Cellular/Wireless

Demographic Requirement Radius Ring:

Varies

Demographic Requirement Minimum Population Requirement:

10,000

Traffic Count:

25,000 VPD

Demographic Comments:

Population: 10k in 5 minute drive time. High traffic, signalized intersections preferred. .

Number of Square Feet and/or Acres:

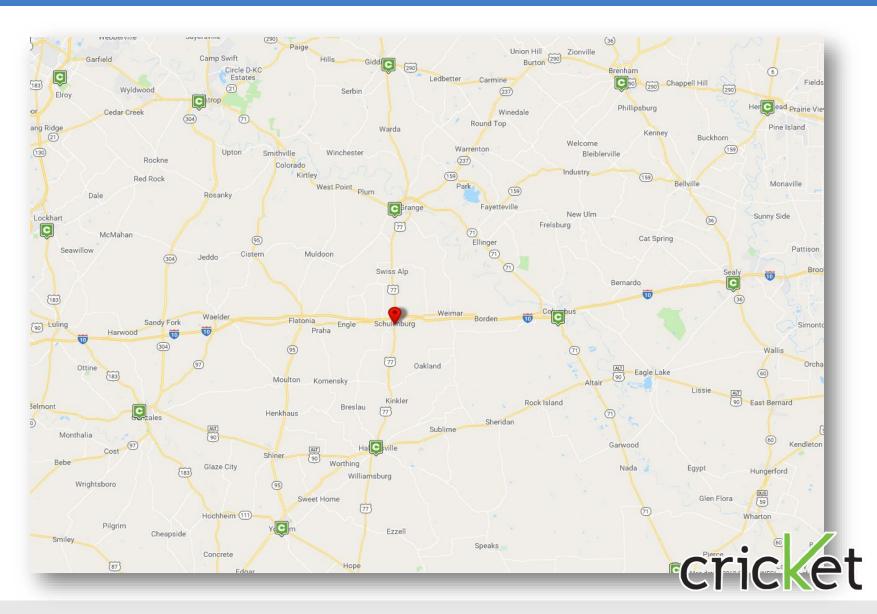
600 SF

Comments on Desired Location:

Vanilla shell preferred. Convenient ingress/egress. Visibility from major roadways. Parking of minimum 25 spaces within the center. Downtown, Free Standing, Kiosk, Lifestyle Center, Neighborhood Strip, Power Center, Regional Mall, Regional Strip.









Cricket Wireless

Category: Cellular / Wireless

Demographic Requirement
Household Income Requirement:

Varies

Traffic Count: Varies

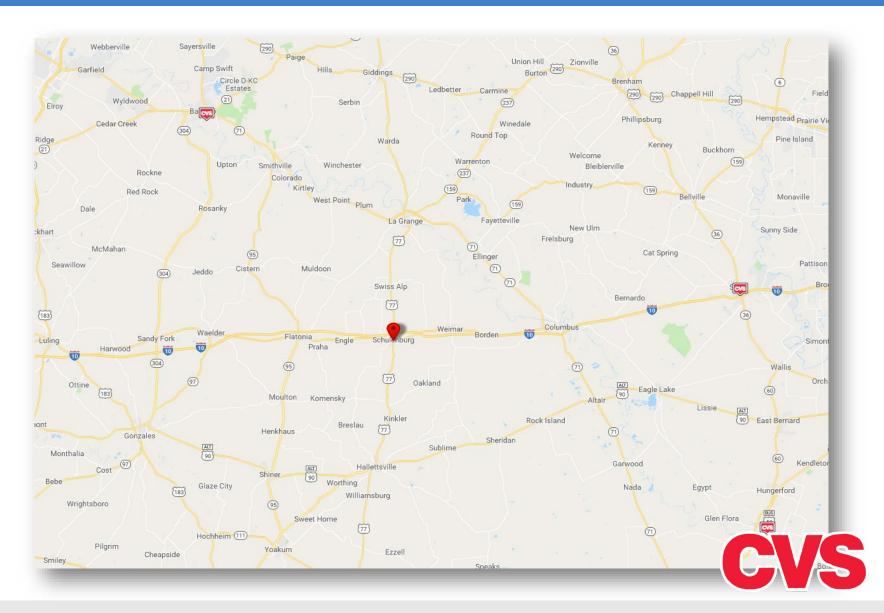
Number of Square Feet and/or Acres: 1,200 SF

Comments on Desired Location: Lifestyle Center, Neighborhood Strip, Power Center, Regional Mall, Regional Strip, Specialty

Strip.









CVS Pharmacy

Category:

Drug Store/Pharmacy

Demographic Requirement Radius Ring:

Varies

Demographic Requirement Minimum Population Requirement:

18,000

Traffic Count:

High traffic area preferred.

Demographic Comments:

Considers multicultural neighborhoods and college towns. Highly visible with pylon sign identity. Easy access with electronic traffic control. High traffic intersections. Freestanding sites with drive-thru pharmacy capability (1.5-2 acres preferred). Parking for 70-85 cars.

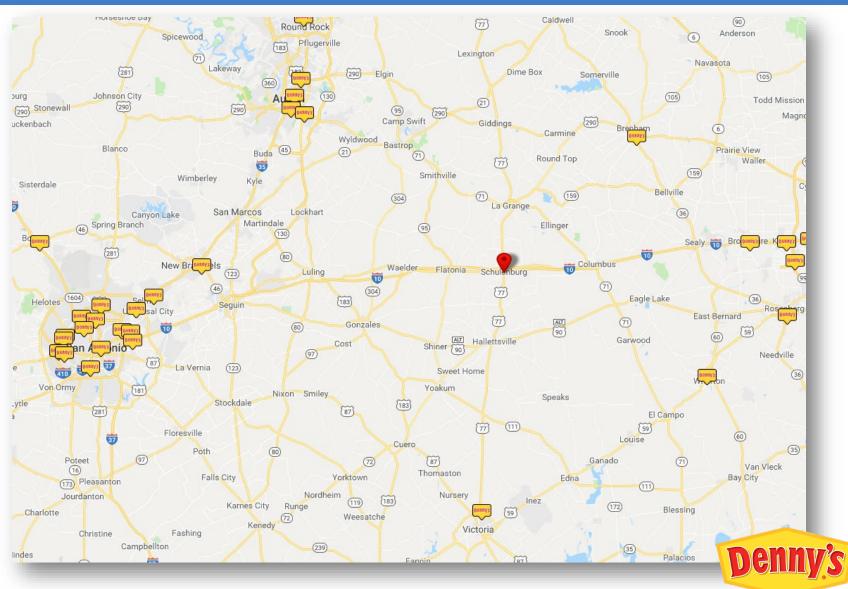
Number of Square Feet and/or Acres: 11,000 SF

Comments on Desired Location:

Prefers freestanding (12,900 sq ft) sites with drive-thru pharmacy capability and easy access with electronic traffic control. Require pylon sign identity and parking for 75-80 vehicles. Also requires site locations to be at high traffic intersections. Downtown, Free Standing, Lifestyle Center, Neighborhood Strip, Power Center, Regional Strip, Special Strip









Denny's

Category: Restaurant (family)

Demographic Requirement Radius Ring:

Varies

Demographic Requirement Minimum Population Requirement:

40,000

Demographic Requirement Household Income Requirement:

\$32,000

Traffic Count:

30,000 VPD

Demographic Comments:

Permanent Population of 40,000 in trade area. Median household income: \$32,000 -

\$50,000. .

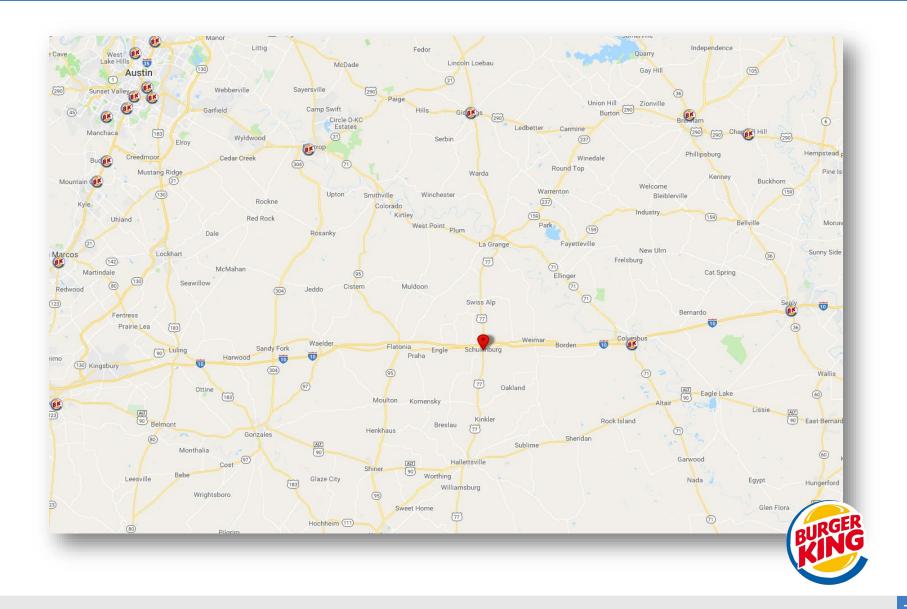
Number of Square Feet and/or Acres:

3,000 SF

Comments on Desired Location:

Prefers land size of 35,000 sq. ft and up with parking for 75 and seating totaling 150. Double ingress and egress and no "dead end" parking on premises. Corner or contiguous to corner or must be located on highway or major traffic corridor.







Burger King

Category: Fast Food

Demographic Requirement Radius Ring:

1

Demographic Requirement Minimum Population Requirement:

30,000

Traffic Count:

25,000 VPD

Demographic Comments:

High traffic locations with good visibility and ease of ingress/egress. .

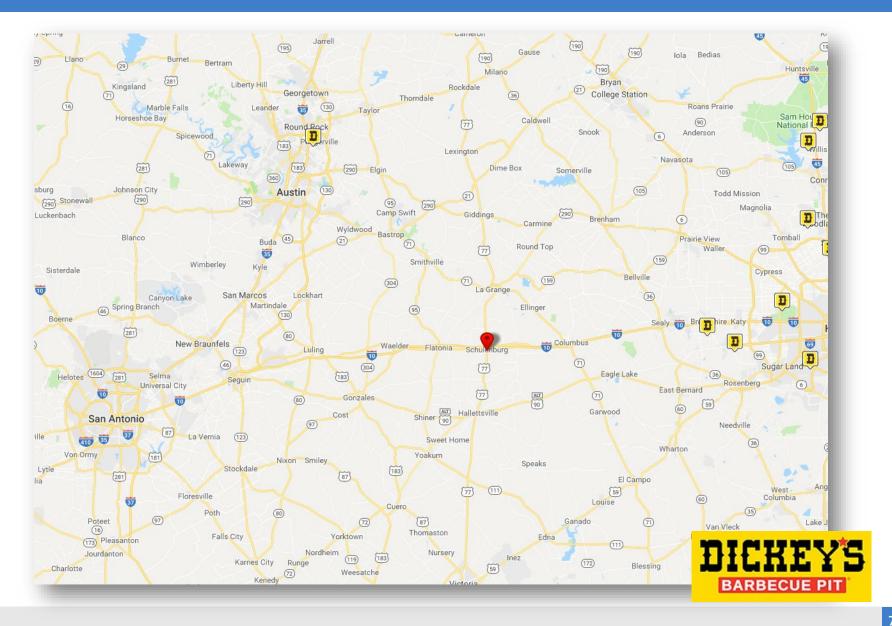
Number of Square Feet and/or Acres:

1,400 SF

Comments on Desired Location:

High Visibility, High Access. Drive-thru. Corners, mall/shopping center out-parcels, freeway locations. Multi-concept (1,800 - 2,500 SF) with Gas & Oil, Retail, Other Food with Site Sharing, with 40-80 seats. Inline/Storefront requires 1000 - 3500 SF. E Downtown, Gas Station, Kiosk, Lifestyle Center, Medical Center, Neighborhood Strip, Outlet Mall, Power Center, Regional Mall, Regional Strip, Special Strip, Transit Terminal







Dickey's Barbecue Pit

Category:

Restaurant (family)

Demographic Requirement Minimum Population Requirement:

30,000

Demographic Requirement Household Income Requirement:

\$60,000

Traffic Count:

15,000 VPD

Demographic Comments:

Daytime/business population of at least 15,000 in trade area. Lunch and Dinner drive time preferred. Must have dense population base with hi-impact office/business market. Trade area will be as good or better in five years than it is at time of acquisition.

Number of Square Feet and/or Acres:

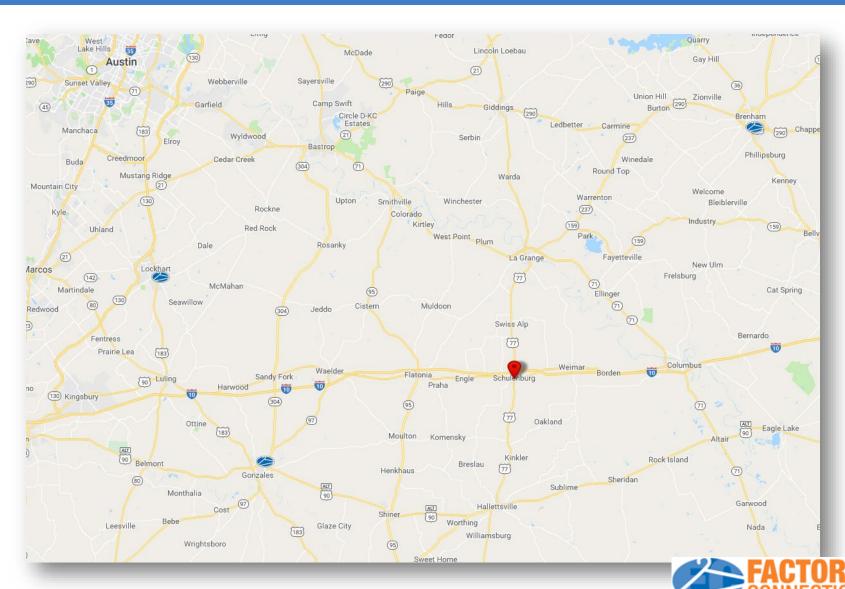
1,600 SF

Comments on Desired Location:

1,400 to 3,000+ square feet plus outdoor patio and landscaping. Freestanding building or end cap. Use of Dickey's finish out spec materials (including brick, wood, and metal) on the exterior space preferred. Drive thru window is preferred, but not necessary.









Factory Connection

Category: Apparel - Family

Demographic Requirement Radius Ring:

Varies

Demographic Requirement Minimum Population Requirement:

25,000

Demographic Requirement Household Income Requirement:

\$25,000

Demographic Comments:

Metropolitan, middle and rural markets. Low to Middle income base. .

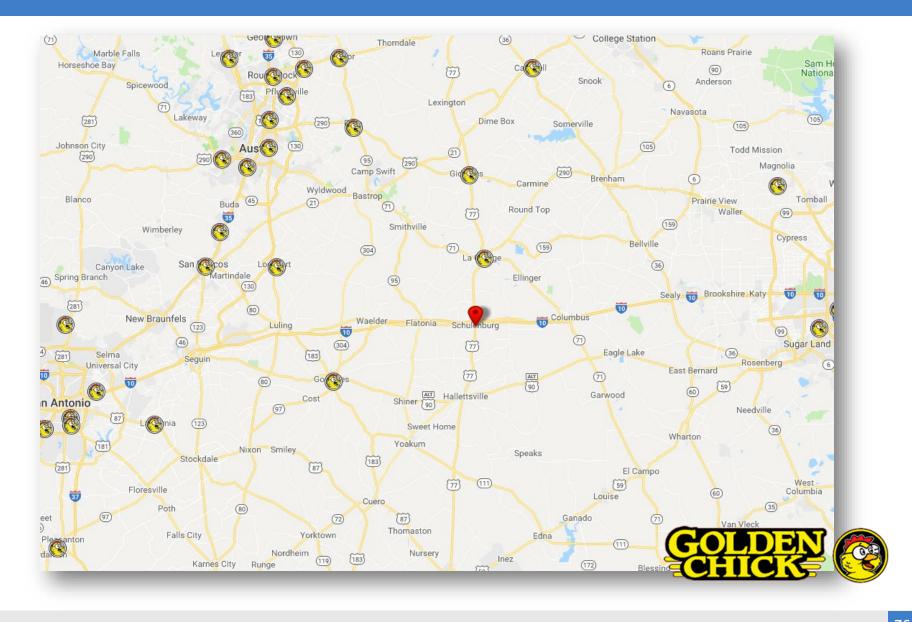
Number of Square Feet and/or Acres:

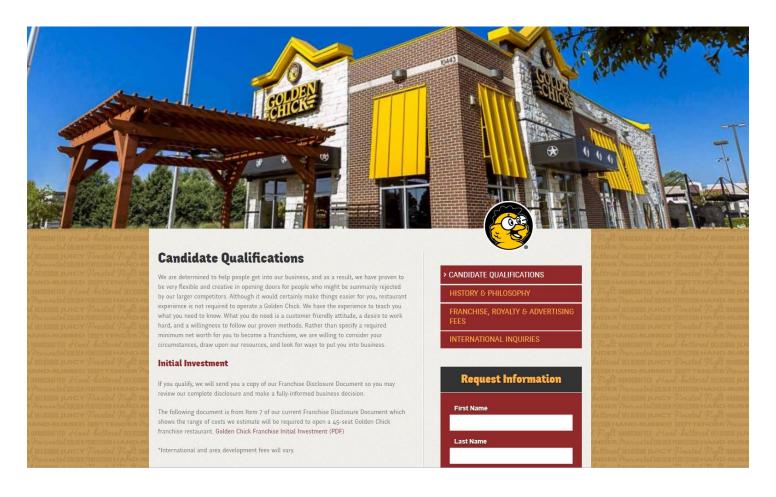
3,500 SF

Comments on Desired Location:

35' plus frontage.





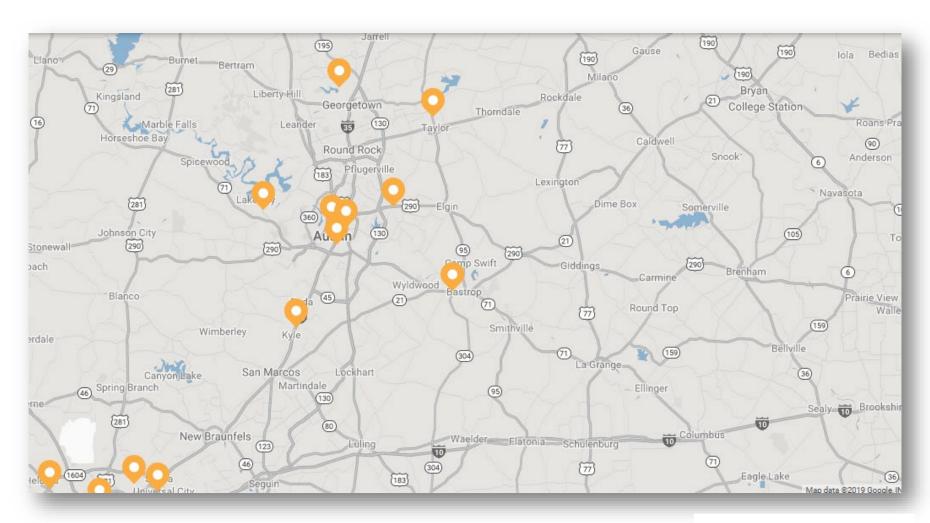


http://goldenchick.com/franchising/candidate-qualifications/





https://www.cobblestonefranchising.com/



https://www.fastmed.com/about-fastmed/sell-your-practice/



Thank you!

