



# PRIMARY RETAIL TRADE AREA GAP/OPPORTUNITY ANALYSIS

College Station, Texas

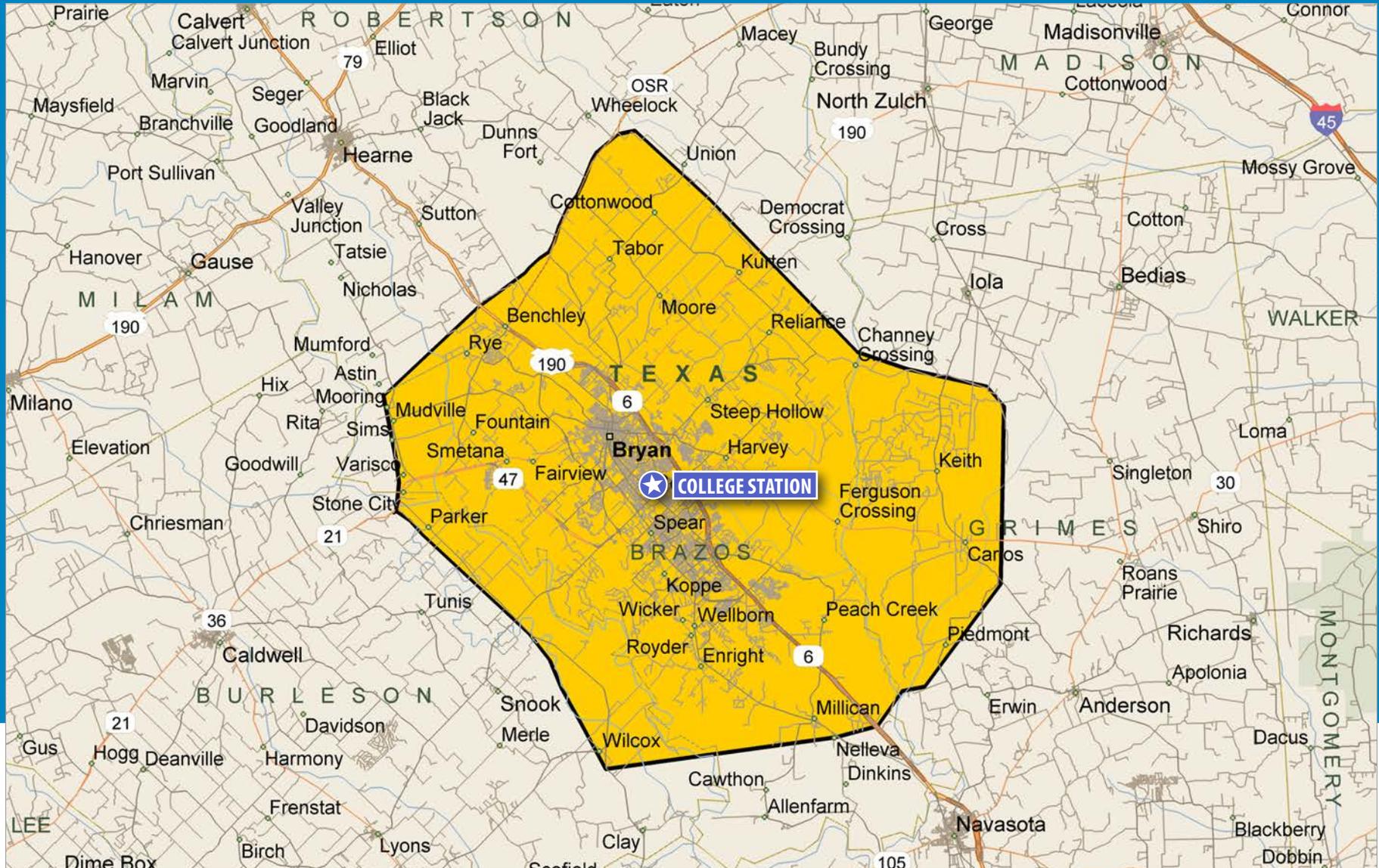


Prepared for  
City of College Station  
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# Primary Retail Trade Area

## College Station, Texas



### Contact Information

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

### College Station, Texas

SECTOR	DESCRIPTION	POTENTIAL SALES	EST. ACTUAL SALES	SURPLUS/LEAKAGE	% SURPLUS
	<b>Total Retail Sales Incl Eating and Drinking Places</b>	<b>3,413,113,835</b>	<b>2,786,314,927</b>	<b>-626,798,908</b>	<b>-18%</b>
441	Motor Vehicle and Parts Dealers	673,058,998	405,570,126	-267,488,872	-40%
4411	Automotive Dealers	569,624,882	309,448,273	-260,176,609	-46%
4412	Other Motor Vehicle Dealers	57,269,698	35,754,947	-21,514,751	-38%
4413	Automotive Parts/Accsrs, Tire Stores	46,164,418	60,366,906	14,202,488	31%
442	Furniture and Home Furnishings Stores	59,840,893	69,409,730	9,568,837	16%
4421	Furniture Stores	31,458,895	28,926,730	-2,532,165	-8%
4422	Home Furnishing Stores	28,381,998	40,483,000	12,101,002	43%
443	Electronics and Appliance Stores	63,483,984	76,244,641	12,760,657	20%
44311	Appliances, TVs, Electronics Stores	48,931,452	60,076,556	11,145,104	23%
443111	Household Appliances Stores	8,008,055	12,716,310	4,708,255	59%
443112	Radio, Television, Electronics Stores	40,923,396	47,360,246	6,436,850	16%
44312	Computer and Software Stores	13,203,289	16,168,085	2,964,796	22%
44313	Camera and Photographic Equipment Stores	1,349,243	0	-1,349,243	-100%
444	Building Material, Garden Equip Stores	308,268,890	275,280,819	-32,988,071	-11%
4441	Building Material and Supply Dealers	262,634,070	200,025,228	-62,608,842	-24%
44411	Home Centers	108,259,567	169,804,100	61,544,533	57%
44412	Paint and Wallpaper Stores	4,259,437	4,630,658	371,221	9%
44413	Hardware Stores	27,956,549	10,498,823	-17,457,726	-62%
44419	Other Building Materials Dealers	122,158,518	15,091,647	-107,066,871	-88%
4442	Lawn, Garden Equipment, Supplies Stores	45,634,820	75,255,591	29,620,771	65%
44421	Outdoor Power Equipment Stores	12,989,753	5,280,030	-7,709,723	-59%
44422	Nursery and Garden Centers	32,645,066	69,975,561	37,330,495	114%

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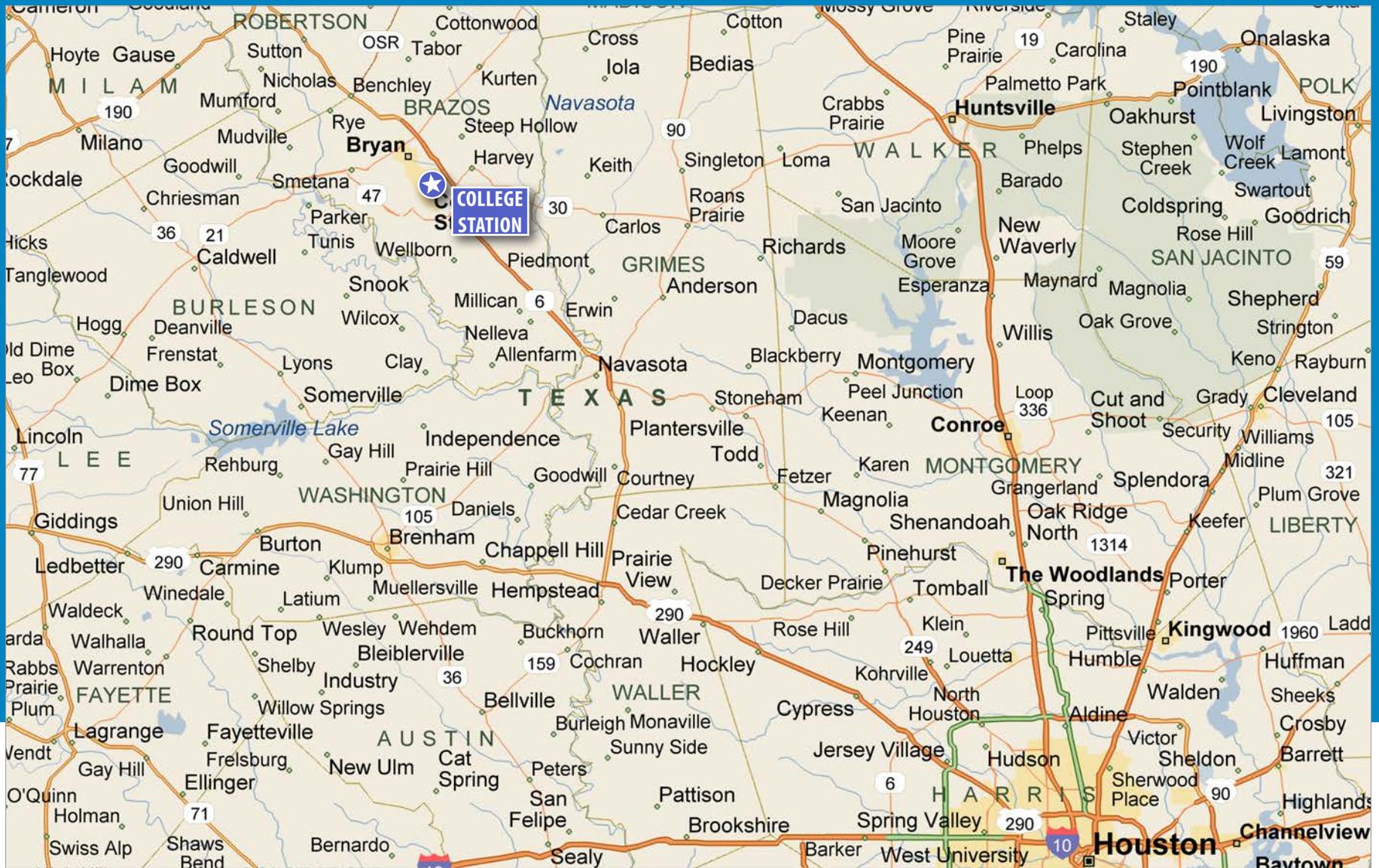
SECTOR	DESCRIPTION	POTENTIAL SALES	EST. ACTUAL SALES	SURPLUS/LEAKAGE	% SURPLUS
445	Food and Beverage Stores	421,412,905	317,630,757	-103,782,148	-25%
4451	Grocery Stores	267,768,176	262,626,552	-5,141,624	-2%
44511	Supermarkets, Grocery (Ex Conv) Stores	249,878,275	246,714,056	-3,164,219	-1%
44512	Convenience Stores	17,889,901	15,912,496	-1,977,405	-11%
4452	Specialty Food Stores	33,086,977	3,328,178	-29,758,799	-90%
4453	Beer, Wine and Liquor Stores	120,557,752	51,676,027	-68,881,725	-57%
446	Health and Personal Care Stores	159,568,207	118,884,530	-40,683,677	-25%
44611	Pharmacies and Drug Stores	127,667,317	79,359,570	-48,307,747	-38%
44612	Cosmetics, Beauty Supplies, Perfume Stores	10,972,060	20,364,773	9,392,713	86%
44613	Optical Goods Stores	6,596,728	7,783,035	1,186,307	18%
44619	Other Health and Personal Care Stores	14,332,102	11,377,152	-2,954,950	-21%
447	Gasoline Stations	341,974,307	146,221,391	-195,752,916	-57%
44711	Gasoline Stations With Conv Stores	247,905,812	120,634,836	-127,270,976	-51%
44719	Other Gasoline Stations	94,068,495	25,586,555	-68,481,940	-73%
448	Clothing and Clothing Accessories Stores	156,907,152	261,007,679	104,100,527	66%
4481	Clothing Stores	85,967,030	208,821,460	122,854,430	143%
44811	Men's Clothing Stores	4,347,334	8,167,093	3,819,759	88%
44812	Women's Clothing Stores	19,479,607	42,643,819	23,164,212	119%
44813	Childrens, Infants Clothing Stores	4,634,376	9,473,003	4,838,627	104%
44814	Family Clothing Stores	46,227,983	122,151,648	75,923,665	164%
44815	Clothing Accessories Stores	3,841,289	6,752,688	2,911,399	76%
44819	Other Clothing Stores	7,436,441	19,633,209	12,196,768	164%
4482	Shoe Stores	13,777,981	28,672,193	14,894,212	108%
4483	Jewelry, Luggage, Leather Goods Stores	57,162,140	23,514,026	-33,648,114	-59%
44831	Jewelry Stores	50,764,472	23,514,026	-27,250,446	-54%
44832	Luggage and Leather Goods Stores	6,397,668	0	-6,397,668	-100%

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SECTOR	DESCRIPTION	POTENTIAL SALES	EST. ACTUAL SALES	SURPLUS/LEAKAGE	% SURPLUS
451	Sporting Goods, Hobby, Book, Music Stores	64,888,179	106,911,947	42,023,768	65%
4511	Sportng Goods, Hobby, Musical Inst Stores	52,011,947	65,531,916	13,519,969	26%
45111	Sporting Goods Stores	27,333,409	54,318,502	26,985,093	99%
45112	Hobby, Toys and Games Stores	15,141,101	9,567,427	-5,573,674	-37%
45113	Sew/Needlework/Piece Goods Stores	3,791,274	241,615	-3,549,659	-94%
45114	Musical Instrument and Supplies Stores	5,746,162	1,404,372	-4,341,790	-76%
4512	Book, Periodical and Music Stores	12,876,232	41,380,031	28,503,799	221%
45121	Book Stores and News Dealers	11,527,459	41,380,031	29,852,572	259%
451211	Book Stores	10,513,596	41,380,031	30,866,435	294%
451212	News Dealers and Newsstands	1,013,862	0	-1,013,862	-100%
45122	Prerecorded Tapes, CDs, Record Stores	1,348,773	0	-1,348,773	-100%
452	General Merchandise Stores	383,348,945	512,273,076	128,924,131	34%
4521	Department Stores Excl Leased Depts	164,296,327	477,945,332	313,649,005	191%
4529	Other General Merchandise Stores	219,052,618	34,327,744	-184,724,874	-84%
453	Miscellaneous Store Retailers	90,413,780	47,996,335	-42,417,445	-47%
4531	Florists	3,006,014	795,033	-2,210,981	-74%
4532	Office Supplies, Stationery, Gift Stores	43,075,972	26,848,190	-16,227,782	-38%
45321	Office Supplies and Stationery Stores	20,279,911	22,667,595	2,387,684	12%
45322	Gift, Novelty and Souvenir Stores	22,796,061	4,180,595	-18,615,466	-82%
4533	Used Merchandise Stores	8,123,988	5,114,949	-3,009,039	-37%
4539	Other Miscellaneous Store Retailers	36,207,806	15,238,163	-20,969,643	-58%
454	Non-Store Retailers	299,623,934	36,853,121	-262,770,813	-88%
722	Foodservice and Drinking Places	390,323,661	412,030,775	21,707,114	6%
7221	Full-Service Restaurants	177,822,807	132,895,894	-44,926,913	-25%
7222	Limited-Service Eating Places	154,515,802	210,817,628	56,301,826	36%
7223	Special Foodservices	42,186,901	21,724,650	-20,462,251	-49%
7224	Drinking Places -Alcoholic Beverages	15,798,152	46,592,603	30,794,451	195%

## Location Map College Station, Texas



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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 2015, 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.

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