

EDC ADDENDUM to the INTERIM REPORT

Economic Impact Assessment of Mansfield Park
November 2018



STEWARDSHIP STRATEGIES
Design | Planning | Historic Preservation | Economic Development

INTRODUCTION

This EDC Addendum to the Interim Report for the Mansfield Park Economic Impact Assessment is to provide additional information to the Bandera Economic Development Corporation (BEDC), including a Retail Marketplace Profile for Bandera County, a Commuter Report, a Work Destination Report and a Jobs Profile Report. This data will help to provide the BEDC with a jobs, employment and economic capacity context for the results of the Economic Impact Assessment of Mansfield Park.

In the following pages of this Addendum, a summary of each report and data document is provided followed by the report pages. Readers are free to review and analyze the reports themselves, or may review the summaries for an understanding of the content. Not all reports have data available for 2018, and some data may be a few years old. The most current data is provided here, and if newer data is available when the final report is published, that data will be updated.



A Harley Davidson motorcycle parked outside the 11th Street Cowboy Bar during Rumble on the River 2018.

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The Apple Store in Medina, Texas.

Home Area Profile Report

Retail Marketplace Profile

A retail marketplace profile provides values for retail gaps or “leakage” - how much money is available to be spent in Bandera County but which is not captured because there is not sufficient business capacity to capture it. The higher the leakage value for a business category the more money in that category is leaving the county. This has implications for jobs, wages and tax revenues.

For example, Bandera County has a retail gap of \$28,227,677 for the category Food & Beverage Stores - Grocery Stores. For the demand for groceries in dollars produced by Bandera County residents, there is not sufficient supply of groceries to meet the demand. Residents will then travel outside the county to other counties to shop for groceries.

Bandera County has a supply surplus in two categories, Food & Beverage Stores - Beer, Wine & Liquor Stores and Food Services & Drinking Places - Special Food Services. The surplus means that the businesses that are currently operating in Bandera in those categories are not currently making as much revenue as they could if there were more demand or less supply.

The business categories that have the highest retail gaps are the categories in which additional business capacity - either additional businesses or expanded businesses - will be the most likely to capture available revenue and produce jobs and tax revenue. The higher the leakage/surplus factor the greater the unmet demand. Automobile dealers, home furnishings stores, clothing stores, books & music stores, department stores and direct selling establishments are among the highest businesses with unmet demand in Bandera County, so residents are traveling outside the county the most to meet those demands.

Inflow/Outflow Report

Bandera County residents work at jobs in Bandera County and outside of Bandera County, and residents of other counties work in Bandera County. This flow of job holders is captured in the Inflow/Outflow Report, which shows that in 2015, 1,635 people both lived and worked in Bandera County, 5,760 people lived in Bandera County and worked outside of Bandera County and 1,313 people lived outside of Bandera County and worked in Bandera County.

Work Destination Report

The work destination report shows where Bandera County residents worked in 2015. San Antonio was the largest employment destination with 30.8% of the employment share, followed by the City of Bandera with 11.4% and Kerrville with 3.9%. All Other Locations are listed with 40.2% of the employment share, which are jobs that are not located within a city or Census-designated place.

SUMMARY OF REPORTS (Continued)

Home Area Profile Report

This report profiles jobs holders in 2015 and shows:

Total Jobs

- Total jobs in 2015 were 7,395

Worker Age

- 20.2% of workers were 29 or younger
- 51.4% of workers were age 30 to 54
- 28.4% of workers were age 55 or older

Wages

- 24% of job wages were \$1,250 or less per month
- 37.1% of job wages were \$1,251 to \$3,333 per month
- 38.9% of jobs were more than \$3,333 per month

Employment Sector

- Construction provided 8.5% of jobs
- Retail trade provided 12.8% of jobs
- Educational services provided 9.7% of jobs
- Health Care and Social Assistance provided 13.6% of jobs
- Accommodation and Food Services provided 9.8% of jobs

Educational Attainment

- 22.3% of workers attained highschool graduation or an equivalent with no college
- 27.8% of workers attained some college or Associate's degree
- 18.2% of workers attained a bachelor's or advanced degree



Motorcycles lined up at Rumble on the River, late September 2018.



Retail MarketPlace Profile

Bandera County, TX
Bandera County, TX
Geography: County

Summary Demographics

2018 Population	22,945
2018 Households	9,604
2018 Median Disposable Income	\$44,994
2018 Per Capita Income	\$31,132

2017 Industry Summary

	NAICS	Demand (Retail Potential)	Supply (Retail Sales)	Retail Gap	Leakage/Surplus Factor	Number of Businesses
Total Retail Trade and Food & Drink	44-45,722	\$339,537,270	\$117,539,796	\$221,997,474	48.6	170
Total Retail Trade	44-45	\$308,794,409	\$106,440,595	\$202,353,814	48.7	126
Total Food & Drink	722	\$30,742,861	\$11,099,201	\$19,643,660	46.9	44

2017 Industry Group

	NAICS	Demand (Retail Potential)	Supply (Retail Sales)	Retail Gap	Leakage/Surplus Factor	Number of Businesses
Motor Vehicle & Parts Dealers	441	\$69,708,067	\$7,546,017	\$62,162,050	80.5	12
Automobile Dealers	4411	\$55,962,751	\$2,261,571	\$53,701,180	92.2	3
Other Motor Vehicle Dealers	4412	\$7,783,615	\$3,371,238	\$4,412,377	39.6	4
Auto Parts, Accessories & Tire Stores	4413	\$5,961,701	\$1,913,208	\$4,048,493	51.4	5
Furniture & Home Furnishings Stores	442	\$9,747,318	\$2,265,247	\$7,482,071	62.3	5
Furniture Stores	4421	\$5,512,017	\$1,960,273	\$3,551,744	47.5	3
Home Furnishings Stores	4422	\$4,235,301	\$304,974	\$3,930,327	86.6	2
Electronics & Appliance Stores	443	\$10,427,664	\$2,500,760	\$7,926,904	61.3	3
Bldg Materials, Garden Equip. & Supply Stores	444	\$22,278,117	\$8,174,297	\$14,103,820	46.3	17
Bldg Material & Supplies Dealers	4441	\$20,914,554	\$6,981,588	\$13,932,966	49.9	13
Lawn & Garden Equip & Supply Stores	4442	\$1,363,563	\$1,192,709	\$170,854	6.7	4
Food & Beverage Stores	445	\$55,200,835	\$25,768,700	\$29,432,135	36.3	25
Grocery Stores	4451	\$50,240,163	\$22,012,486	\$28,227,677	39.1	16
Specialty Food Stores	4452	\$2,324,050	\$744,895	\$1,579,155	51.5	4
Beer, Wine & Liquor Stores	4453	\$2,636,622	\$3,011,319	-\$374,697	-6.6	5
Health & Personal Care Stores	446,4461	\$19,141,663	\$8,552,951	\$10,588,712	38.2	4
Gasoline Stations	447,4471	\$31,355,289	\$22,254,932	\$9,100,357	17.0	9
Clothing & Clothing Accessories Stores	448	\$12,310,186	\$2,873,105	\$9,437,081	62.2	13
Clothing Stores	4481	\$8,220,019	\$1,090,086	\$7,129,933	76.6	5
Shoe Stores	4482	\$1,681,052	\$389,408	\$1,291,644	62.4	2
Jewelry, Luggage & Leather Goods Stores	4483	\$2,409,115	\$1,393,611	\$1,015,504	26.7	6
Sporting Goods, Hobby, Book & Music Stores	451	\$9,789,766	\$3,623,576	\$6,166,190	46.0	8
Sporting Goods/Hobby/Musical Instr Stores	4511	\$8,792,428	\$3,623,576	\$5,168,852	41.6	8
Book, Periodical & Music Stores	4512	\$997,338	\$0	\$997,338	100.0	0
General Merchandise Stores	452	\$50,728,189	\$17,377,625	\$33,350,564	49.0	9
Department Stores Excluding Leased Depts.	4521	\$34,447,458	\$1,968,697	\$32,478,761	89.2	1
Other General Merchandise Stores	4529	\$16,280,731	\$15,408,928	\$871,803	2.8	8
Miscellaneous Store Retailers	453	\$12,843,417	\$3,649,998	\$9,193,419	55.7	16
Florists	4531	\$536,293	\$335,846	\$200,447	23.0	2
Office Supplies, Stationery & Gift Stores	4532	\$2,438,386	\$810,700	\$1,627,686	50.1	7
Used Merchandise Stores	4533	\$1,832,826	\$666,324	\$1,166,502	46.7	4
Other Miscellaneous Store Retailers	4539	\$8,035,912	\$1,837,128	\$6,198,784	62.8	3
Nonstore Retailers	454	\$5,263,898	\$1,853,387	\$3,410,511	47.9	5
Electronic Shopping & Mail-Order Houses	4541	\$3,378,016	\$1,479,329	\$1,898,687	39.1	1
Vending Machine Operators	4542	\$270,267	\$201,851	\$68,416	14.5	2
Direct Selling Establishments	4543	\$1,615,615	\$172,207	\$1,443,408	80.7	2
Food Services & Drinking Places	722	\$30,742,861	\$11,099,201	\$19,643,660	46.9	44
Special Food Services	7223	\$359,442	\$364,042	-\$4,600	-0.6	2
Drinking Places - Alcoholic Beverages	7224	\$1,064,935	\$1,035,548	\$29,387	1.4	5
Restaurants/Other Eating Places	7225	\$29,318,484	\$9,699,611	\$19,618,873	50.3	37

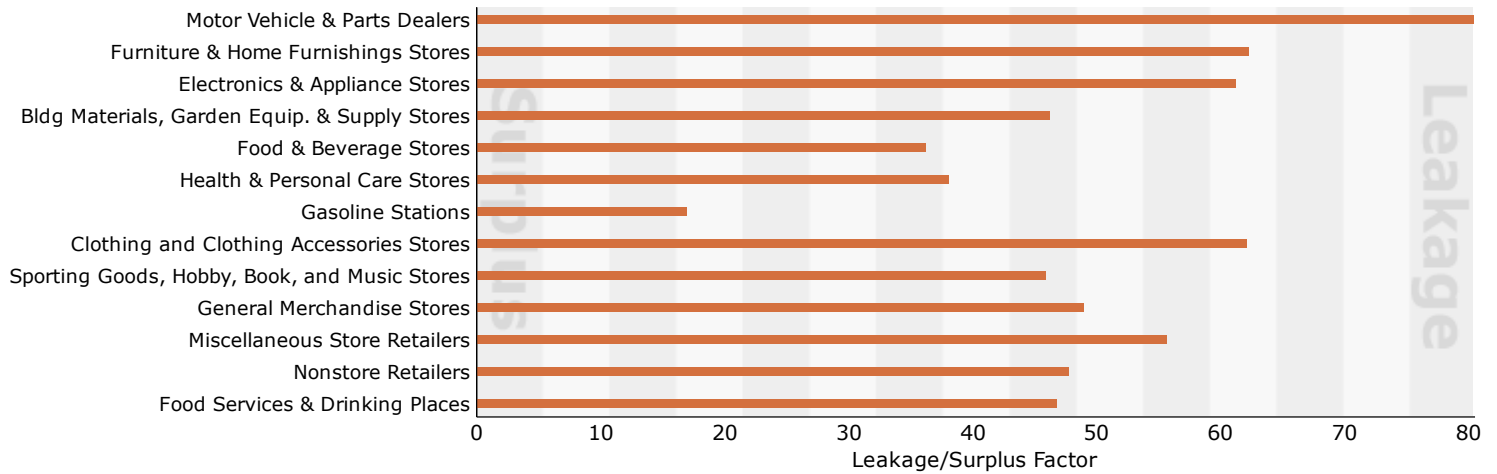
Data Note: Supply (retail sales) estimates sales to consumers by establishments. Sales to businesses are excluded. Demand (retail potential) estimates the expected amount spent by consumers at retail establishments. Supply and demand estimates are in current dollars. The Leakage/Surplus Factor presents a snapshot of retail opportunity. This is a measure of the relationship between supply and demand that ranges from +100 (total leakage) to -100 (total surplus). A positive value represents 'leakage' of retail opportunity outside the trade area. A negative value represents a surplus of retail sales, a market where customers are drawn in from outside the trade area. The Retail Gap represents the difference between Retail Potential and Retail Sales. Esri uses the North American Industry Classification System (NAICS) to classify businesses by their primary type of economic activity. Retail establishments are classified into 27 industry groups in the Retail Trade sector, as well as four industry groups within the Food Services & Drinking Establishments subsector. For more information on the Retail MarketPlace data, please click the link below to view the Methodology Statement. <http://www.esri.com/library/whitepapers/pdfs/esri-data-retail-marketplace.pdf>

Source: Esri and Infogroup. Esri 2018 Updated Demographics. Esri 2017 Retail MarketPlace. Copyright 2018 Esri. Copyright 2017 Infogroup, Inc. All rights reserved.

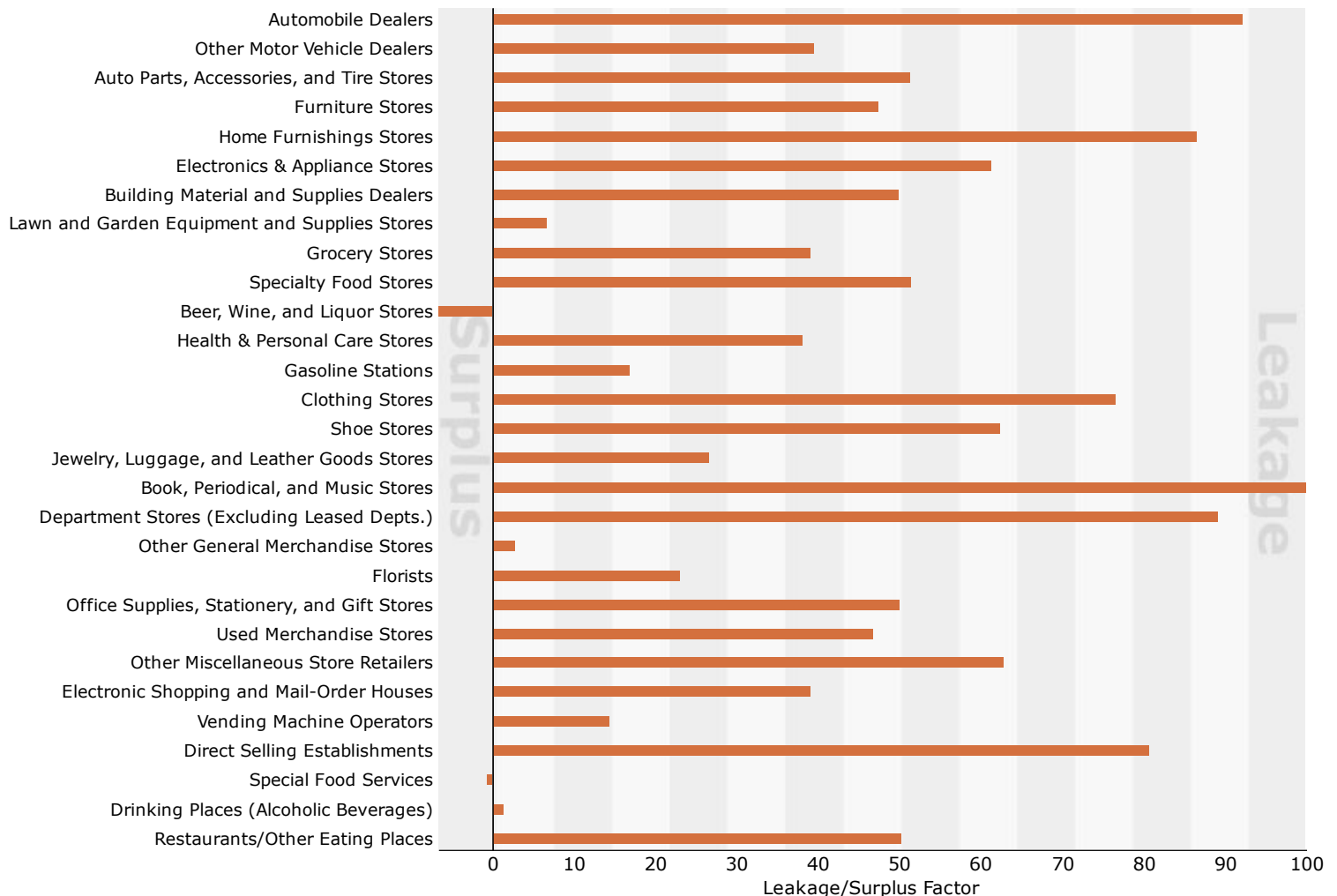
August 15, 2018

Bandera County, TX
 Bandera County, TX
 Geography: County

2017 Leakage/Surplus Factor by Industry Subsector



2017 Leakage/Surplus Factor by Industry Group



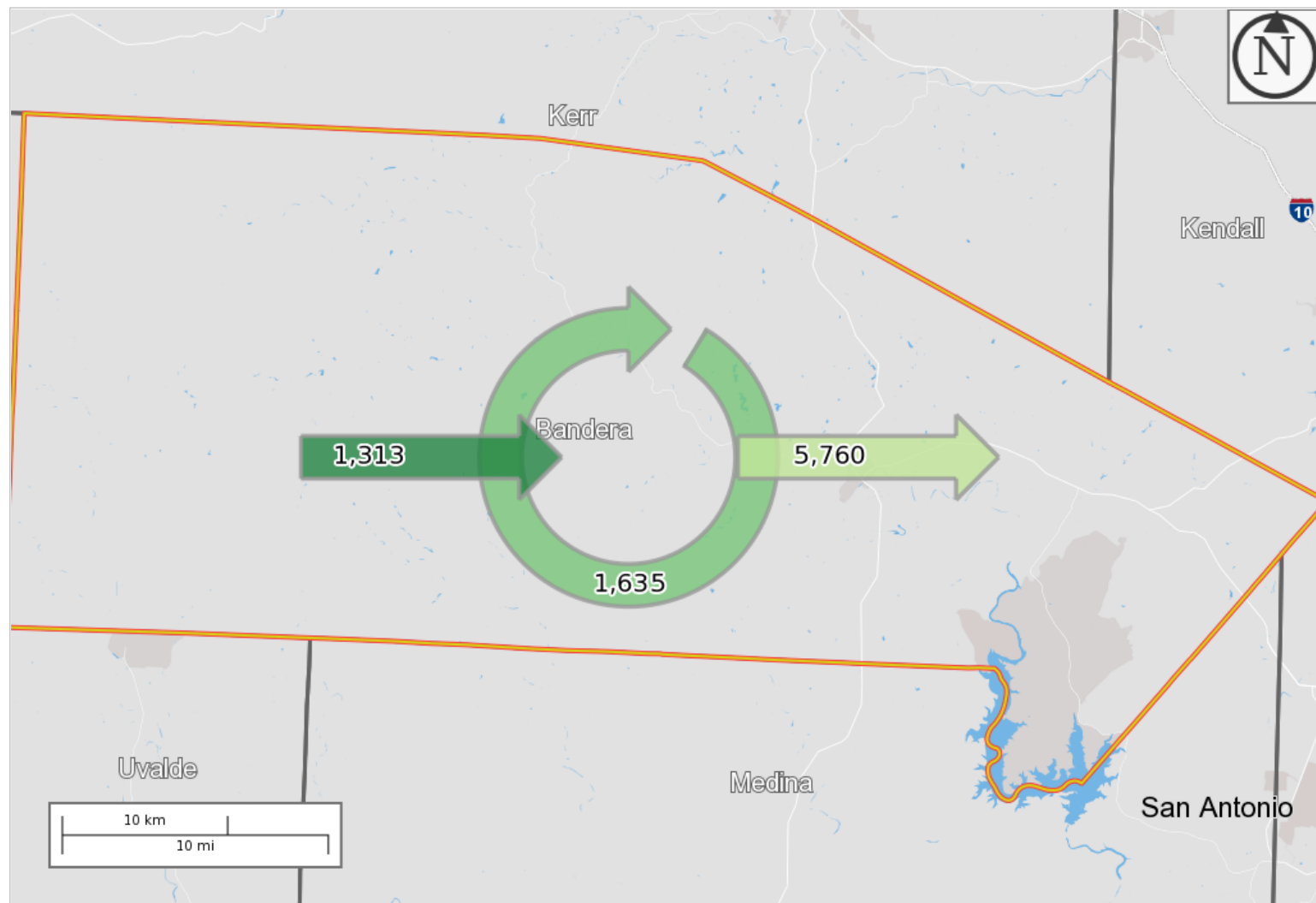
Inflow/Outflow Report

All Jobs for All Workers in 2015

Created by the U.S. Census Bureau's OnTheMap <http://onthemap.ces.census.gov> on 10/17/2018

Inflow/Outflow Counts of All Jobs for Selection Area in 2015

All Workers



Map Legend

Selection Areas

Analysis Selection

Inflow/Outflow

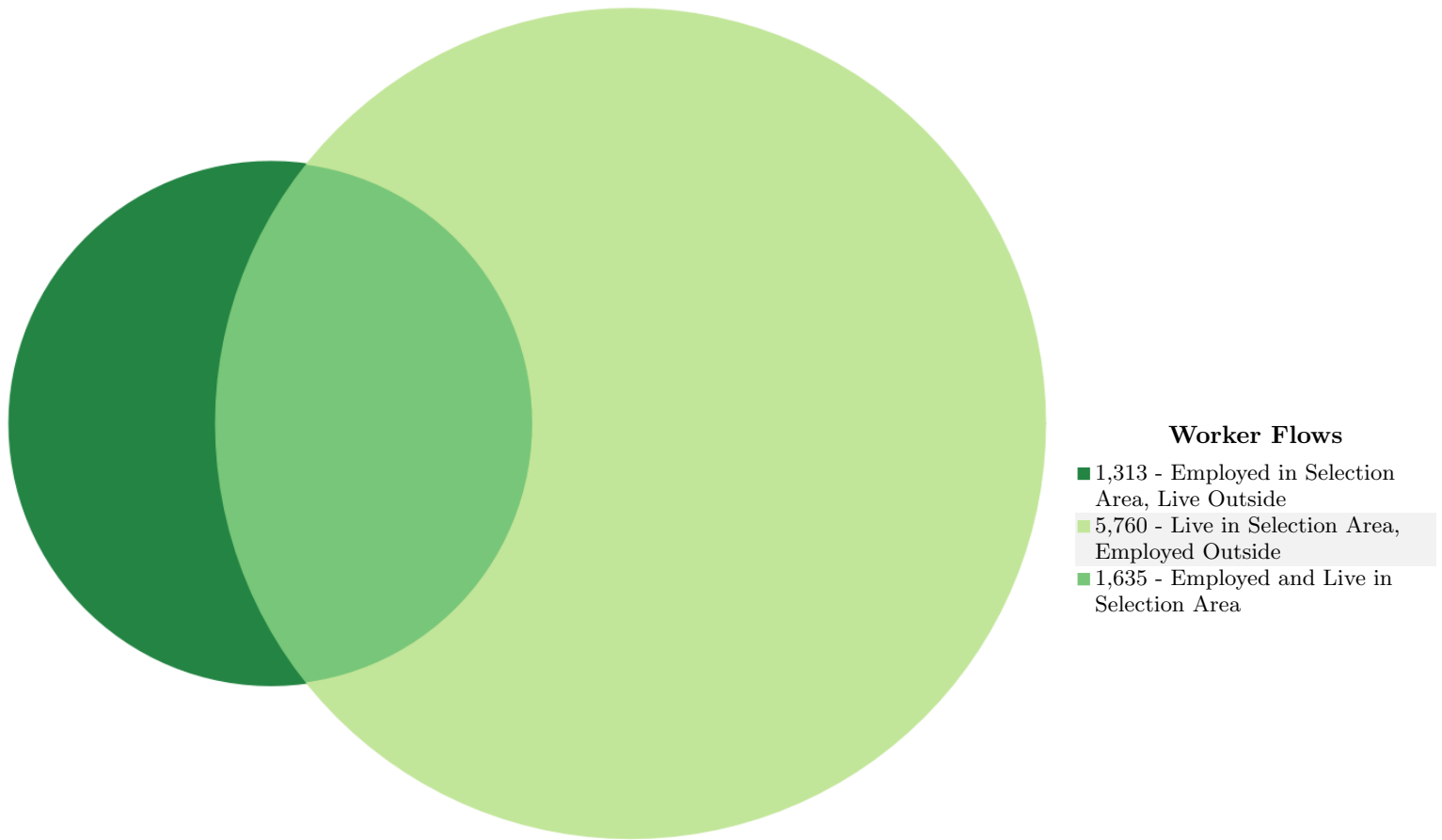
- Employed and Live in Selection Area
- Employed in Selection Area, Live Outside
- Live in Selection Area, Employed Outside

Note: Overlay arrows do not indicate directionality of worker flow between home and employment locations.



Inflow/Outflow Counts of All Jobs for Selection Area in 2015

All Workers



Inflow/Outflow Counts of All Jobs for Selection Area in 2015

All Workers

Worker Totals and Flows	2015	
	Count	Share
Employed in the Selection Area	2,948	100.0
Employed in the Selection Area but Living Outside	1,313	44.5
Employed and Living in the Selection Area	1,635	55.5
Living in the Selection Area	7,395	100.0
Living in the Selection Area but Employed Outside	5,760	77.9
Living and Employed in the Selection Area	1,635	22.1

Additional Information

Analysis Settings

Analysis Type	Inflow/Outflow
Selection area as	N/A
Year(s)	2015
Job Type	All Jobs
Selection Area	Bandera County, TX from Counties
Selected Census Blocks	2,267
Analysis Generation Date	10/17/2018 16:04 - OnTheMap 6.5
Code Revision	d6ec994dcb416ba9b4b1b8cb2b4d690f01609fc9
LODES Data Version	20160219

Data Sources

Source: U.S. Census Bureau, OnTheMap Application and LEHD Origin-Destination Employment Statistics (Beginning of Quarter Employment, 2nd Quarter of 2002-2015).

Notes

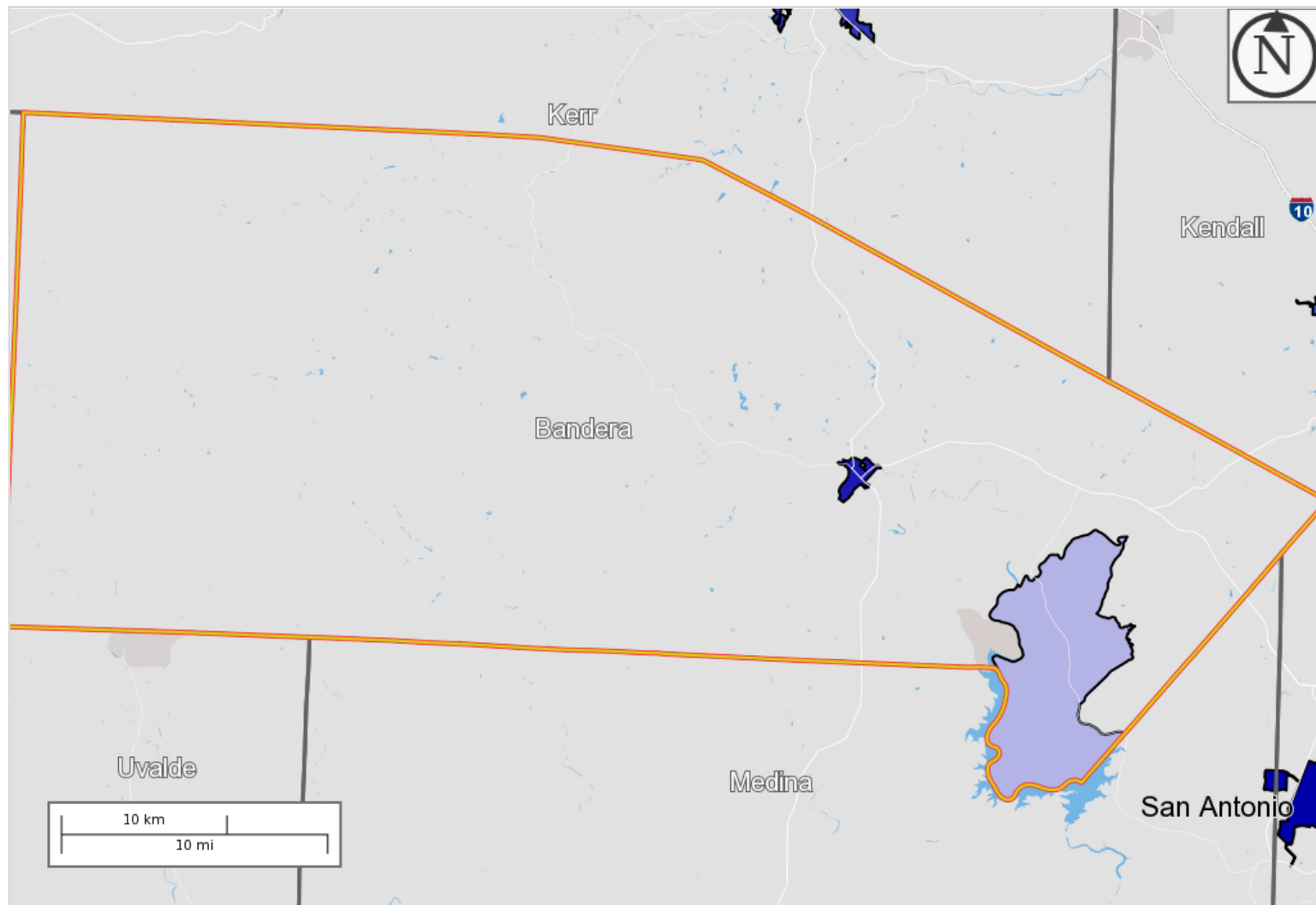
1. Race, Ethnicity, Educational Attainment, and Sex statistics are beta release results and are not available before 2009.
2. Educational Attainment is only produced for workers aged 30 and over.
3. Firm Age and Firm Size statistics are beta release results for All Private jobs and are not available before 2011.

Work Destination Report - Home Selection Area to Work Places (Cities, CDPs, etc.)

All Jobs for All Workers in 2015

Created by the U.S. Census Bureau's OnTheMap <http://onthemap.ces.census.gov> on 10/17/2018

Counts of All Jobs from Home Selection Area to Work Places (Cities, CDPs, etc.) in 2015
All Workers



Map Legend

Job Count

- 2,278
- 840
- 285
- 282
- 242
- 163
- 133
- 75
- 67
- 54

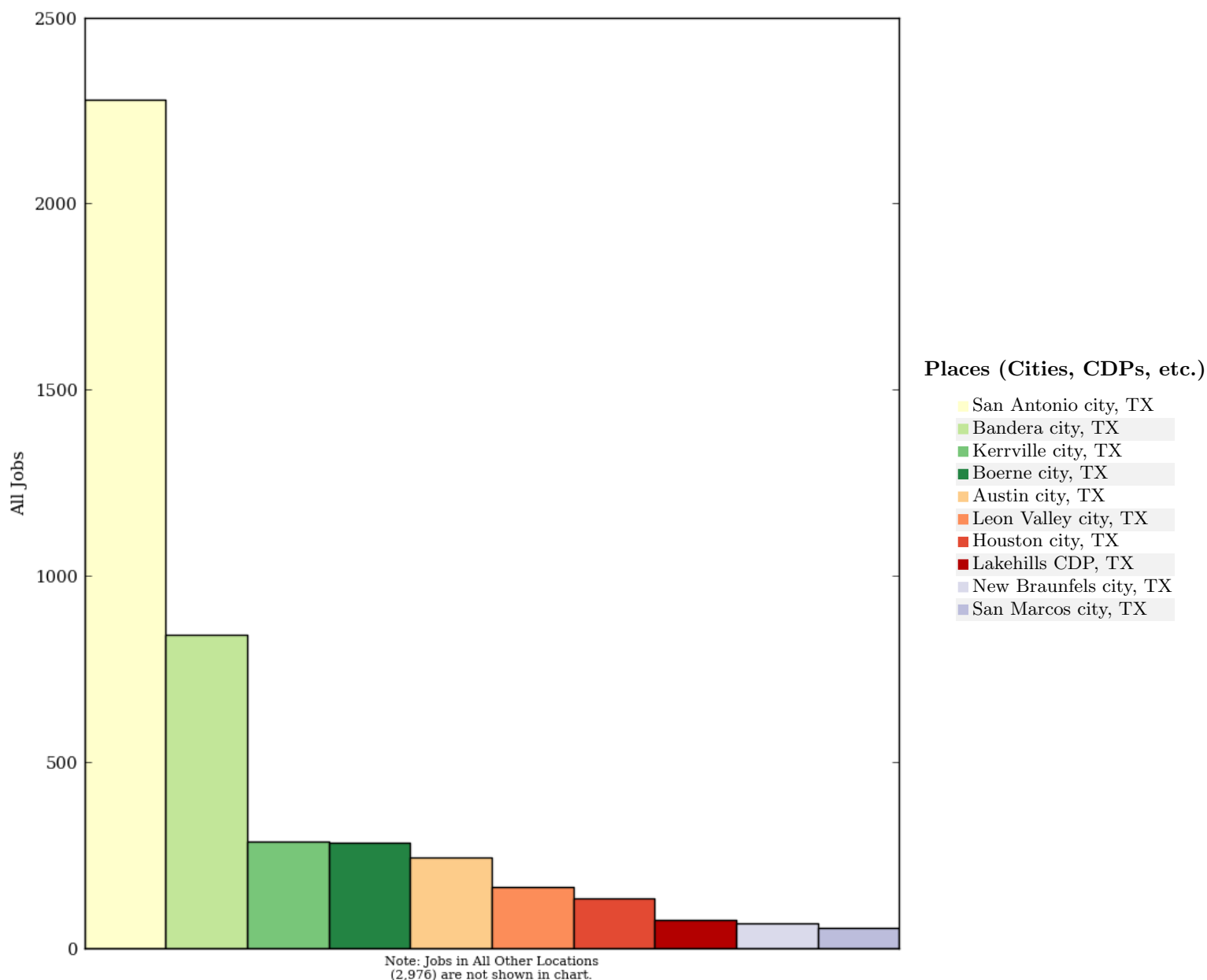
Selection Areas

- 📍 Analysis Selection



All Jobs from Home Selection Area to Work Places (Cities, CDPs, etc.) in 2015

All Workers



All Jobs from Home Selection Area to Work Places (Cities, CDPs, etc.) in 2015

All Workers

Places (Cities, CDPs, etc.) as Work Destination Area	2015	
	Count	Share
All Places (Cities, CDPs, etc.)	7,395	100.0
San Antonio city, TX	2,278	30.8
Bandera city, TX	840	11.4
Kerrville city, TX	285	3.9
Boerne city, TX	282	3.8
Austin city, TX	242	3.3
Leon Valley city, TX	163	2.2
Houston city, TX	133	1.8
Lakehills CDP, TX	75	1.0

Places (Cities, CDPs, etc.) as Work Destination Area	2015	
	Count	Share
New Braunfels city, TX	67	0.9
San Marcos city, TX	54	0.7
All Other Locations	2,976	40.2

Additional Information

Analysis Settings

Analysis Type	Destination
Destination Type	Places (Cities, CDPs, etc.)
Selection area as	Home
Year(s)	2015
Job Type	All Jobs
Selection Area	Bandera County, TX from Counties
Selected Census Blocks	2,267
Analysis Generation Date	10/17/2018 16:20 - OnTheMap 6.5
Code Revision	d6ec994dcb416ba9b4b1b8cb2b4d690f01609fc9
LODES Data Version	20160219

Data Sources

Source: U.S. Census Bureau, OnTheMap Application and LEHD Origin-Destination Employment Statistics (Beginning of Quarter Employment, 2nd Quarter of 2002-2015).

Notes

1. Race, Ethnicity, Educational Attainment, and Sex statistics are beta release results and are not available before 2009.
2. Educational Attainment is only produced for workers aged 30 and over.
3. Firm Age and Firm Size statistics are beta release results for All Private jobs and are not available before 2011.

Home Area Profile Report

Total All Jobs

	2015	
	Count	Share
Total All Jobs	7,395	100.0%

Jobs by Worker Age

	2015	
	Count	Share
Age 29 or younger	1,491	20.2%
Age 30 to 54	3,803	51.4%
Age 55 or older	2,101	28.4%

Jobs by Earnings

	2015	
	Count	Share
\$1,250 per month or less	1,773	24.0%
\$1,251 to \$3,333 per month	2,742	37.1%
More than \$3,333 per month	2,880	38.9%

Jobs by NAICS Industry Sector

	2015	
	Count	Share
Agriculture, Forestry, Fishing and Hunting	167	2.3%
Mining, Quarrying, and Oil and Gas Extraction	144	1.9%
Utilities	94	1.3%
Construction	629	8.5%
Manufacturing	315	4.3%
Wholesale Trade	288	3.9%
Retail Trade	945	12.8%

Jobs by NAICS Industry Sector

	2015	
	Count	Share
Transportation and Warehousing	221	3.0%
Information	124	1.7%
Finance and Insurance	404	5.5%
Real Estate and Rental and Leasing	148	2.0%
Professional, Scientific, and Technical Services	391	5.3%
Management of Companies and Enterprises	51	0.7%
Administration & Support, Waste Management and Remediation	352	4.8%
Educational Services	719	9.7%
Health Care and Social Assistance	1,007	13.6%
Arts, Entertainment, and Recreation	87	1.2%
Accommodation and Food Services	723	9.8%
Other Services (excluding Public Administration)	261	3.5%
Public Administration	325	4.4%

Jobs by Worker Race

	2015	
	Count	Share
White Alone	6,989	94.5%
Black or African American Alone	163	2.2%

Jobs by Worker Race

	2015	
	Count	Share
American Indian or Alaska Native Alone	82	1.1%
Asian Alone	60	0.8%
Native Hawaiian or Other Pacific Islander Alone	8	0.1%
Two or More Race Groups	93	1.3%

Jobs by Worker Sex

	2015	
	Count	Share
Female	3,733	50.5%

Jobs by Worker Ethnicity

	2015	
	Count	Share
Not Hispanic or Latino	5,906	79.9%
Hispanic or Latino	1,489	20.1%

Jobs by Worker Educational Attainment

	2015	
	Count	Share
Less than high school	852	11.5%
High school or equivalent, no college	1,650	22.3%
Some college or Associate degree	2,054	27.8%
Bachelor's degree or advanced degree	1,348	18.2%
Educational attainment not available (workers aged 29 or younger)	1,491	20.2%

Jobs by Worker Sex

	2015	
	Count	Share
Male	3,662	49.5%

Source: U.S. Census Bureau, OnTheMap Application, <http://onthemap.ces.census.gov>