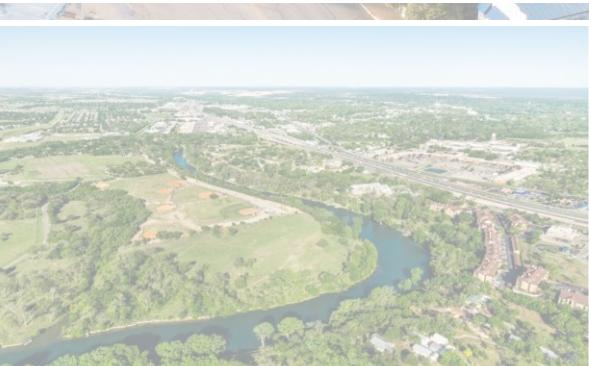




NEW BRAUNFELS – WEST END MARKET TRENDS



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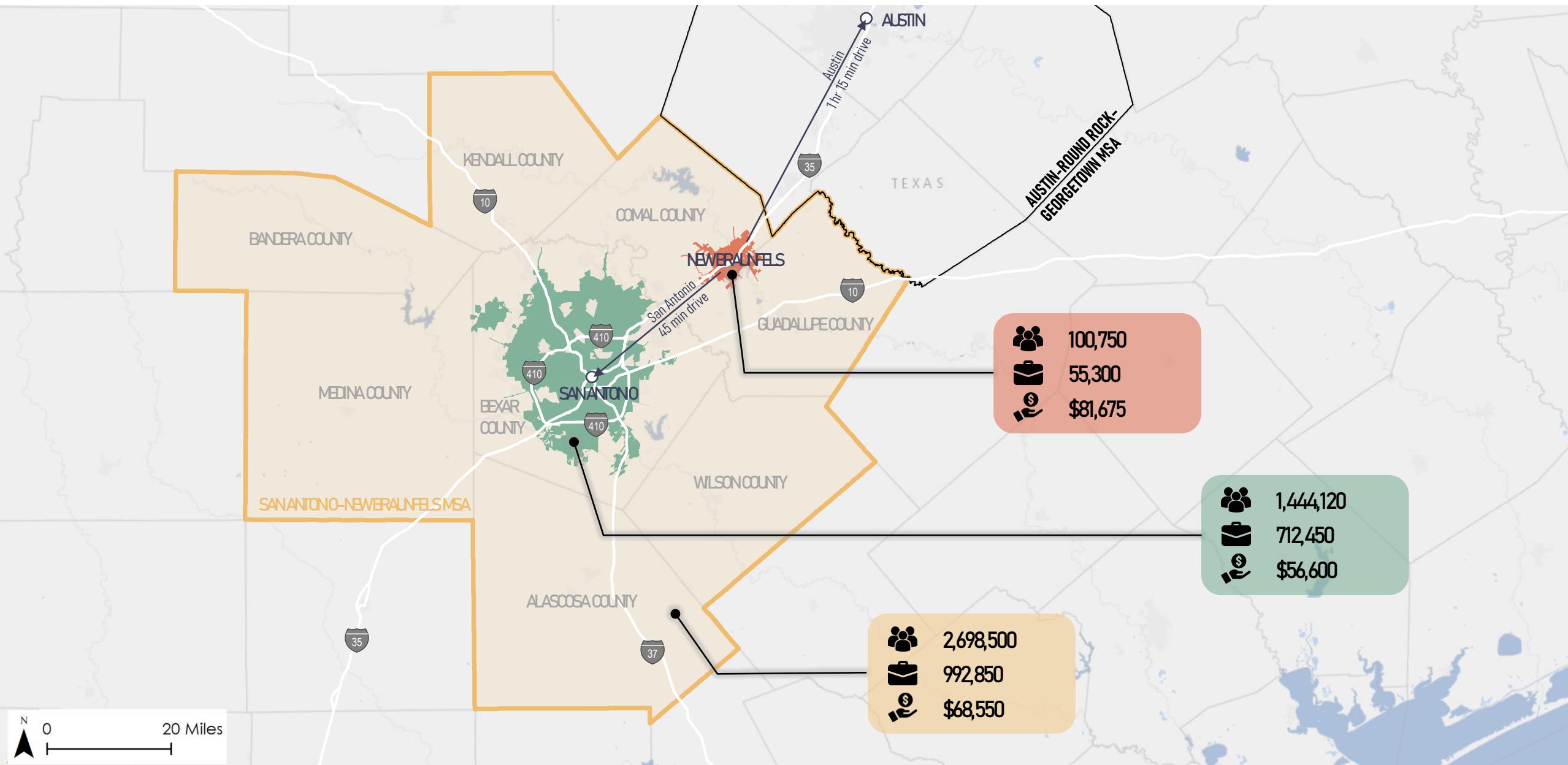
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REGIONAL CONTEXT

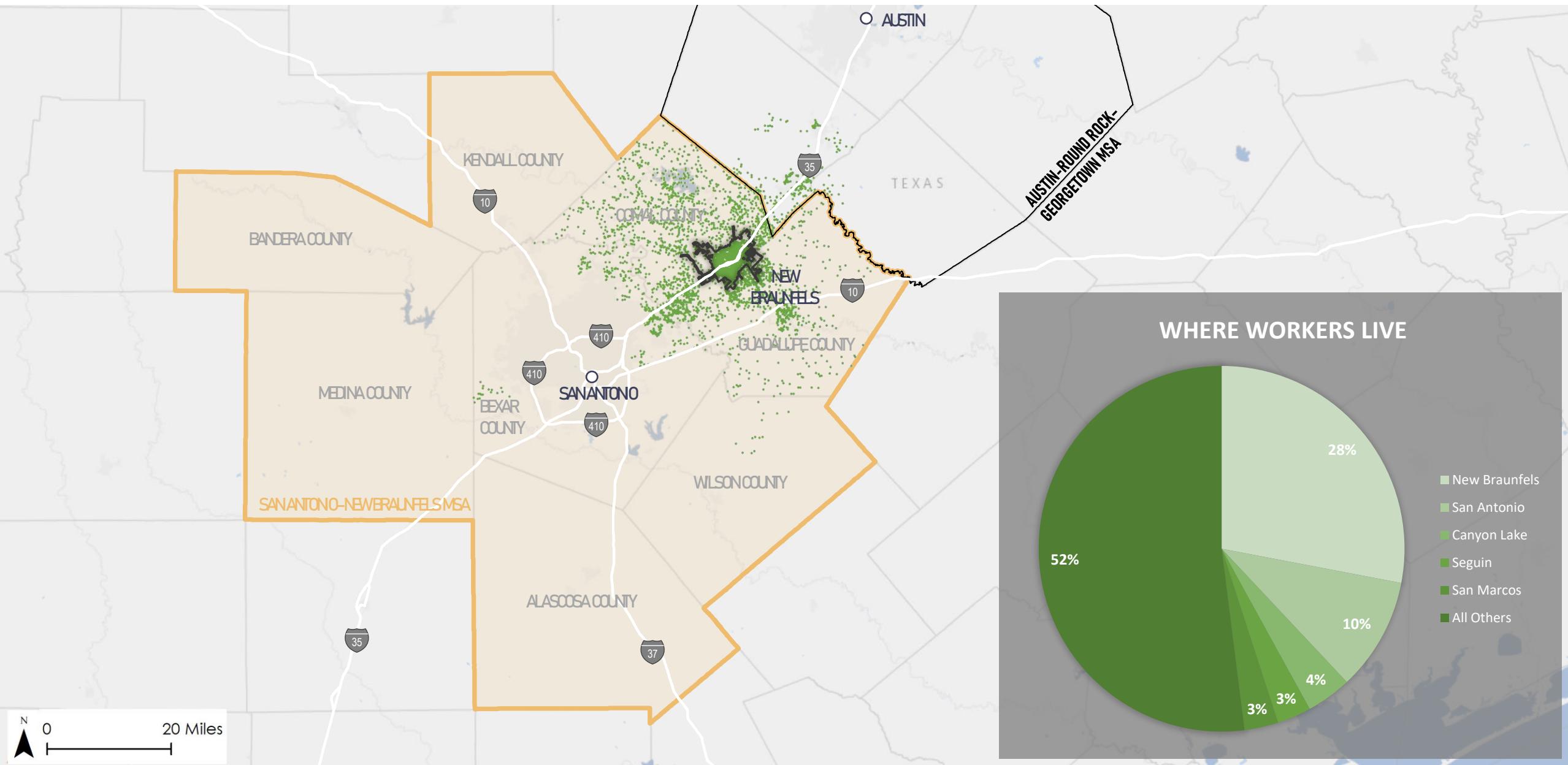


Note: Commute distances based on peak weekday (Tuesday at 9:00 am) traffic.

Source: Landwise Advisors (data retrieved from TIGER/Line Shapefiles)

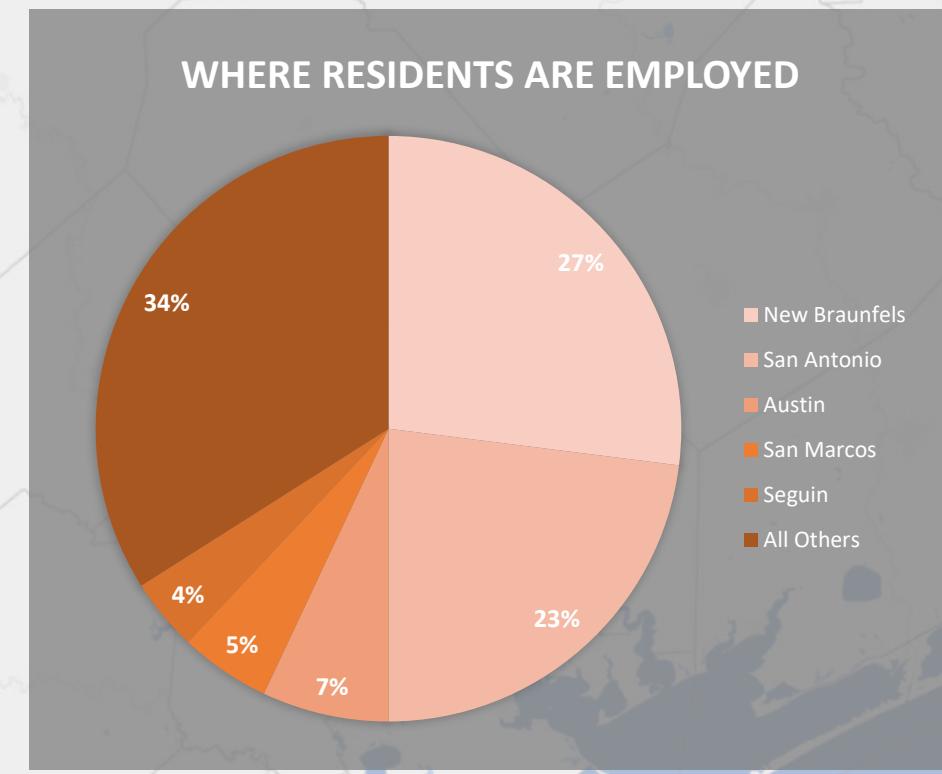
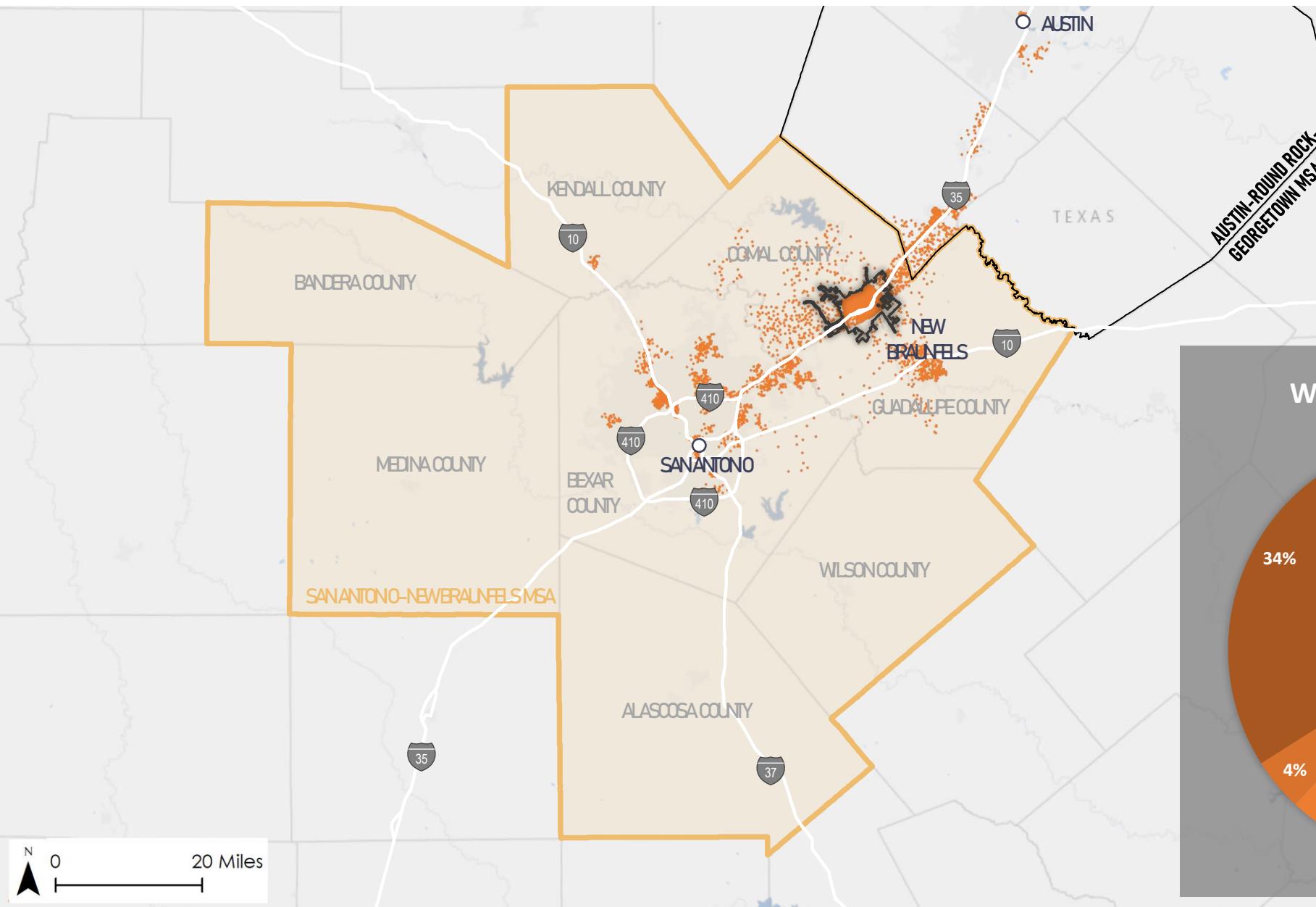
SAN ANTONIO METRO AREA

Where Workers Live



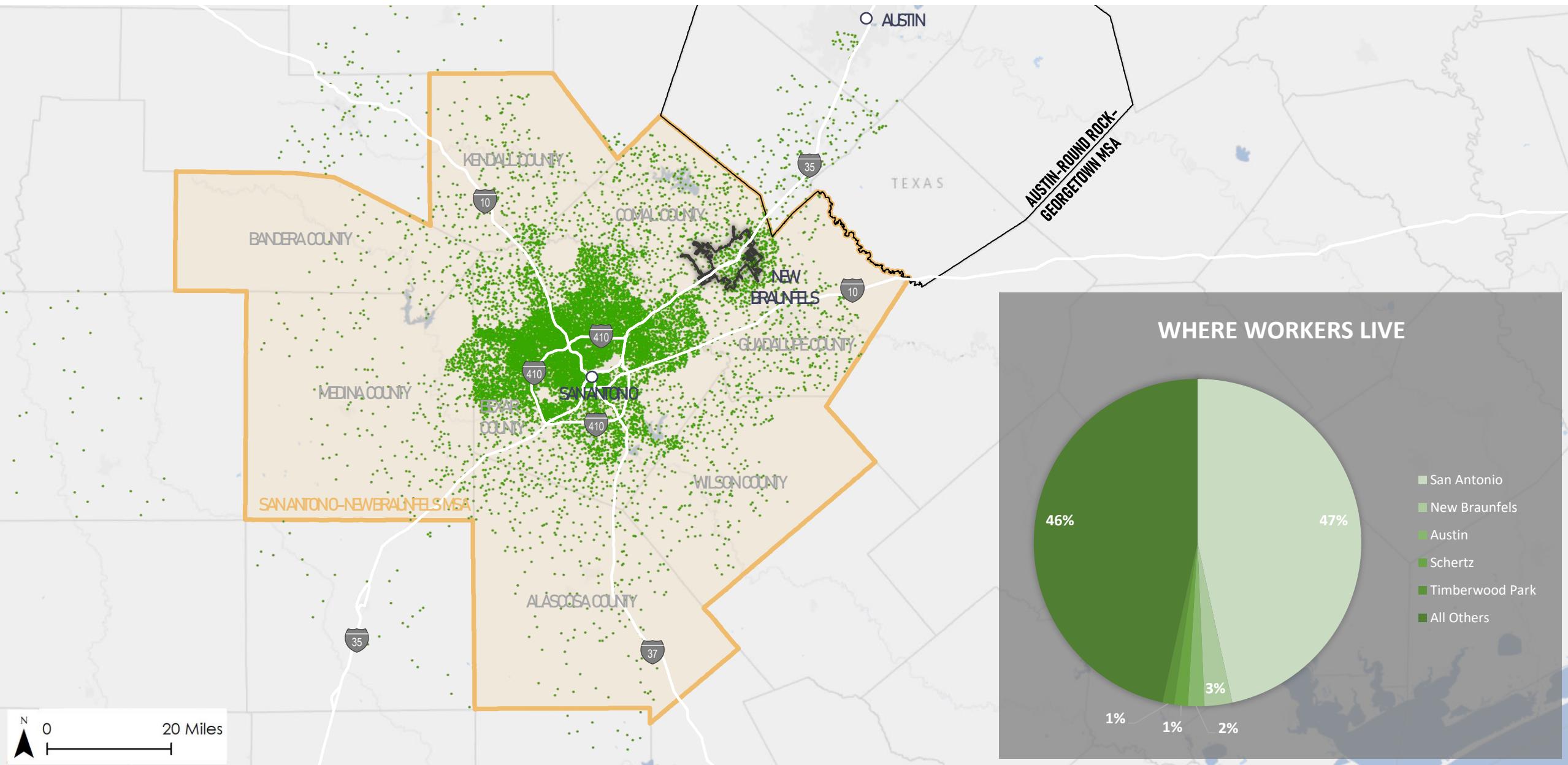
SAN ANTONIO METRO AREA

Where Residents Are Employed



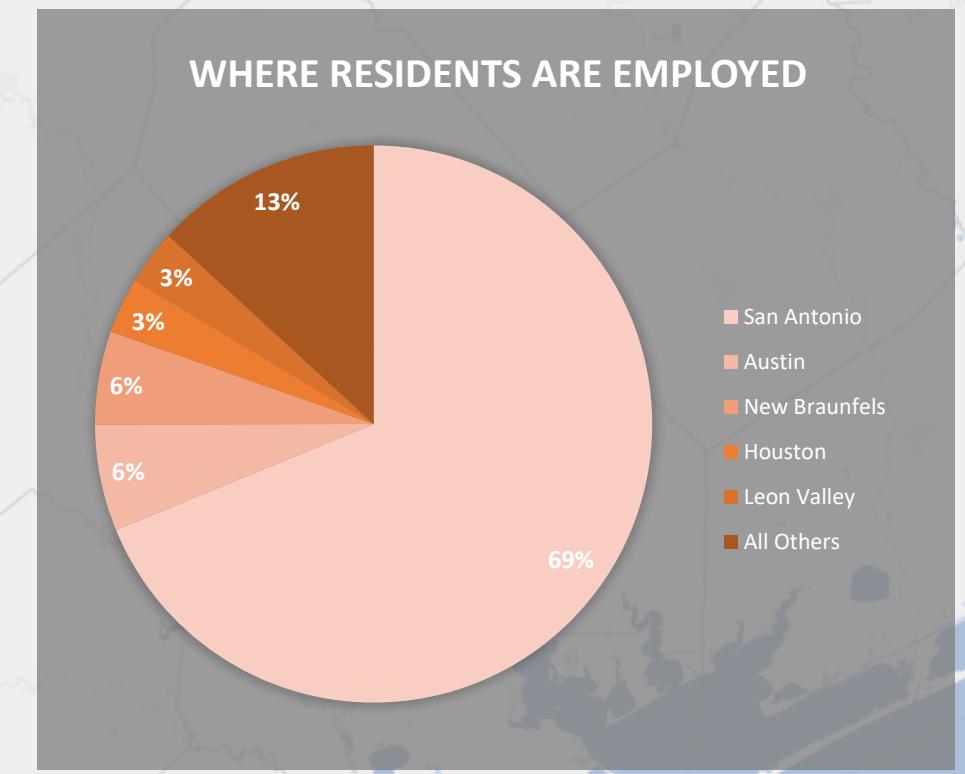
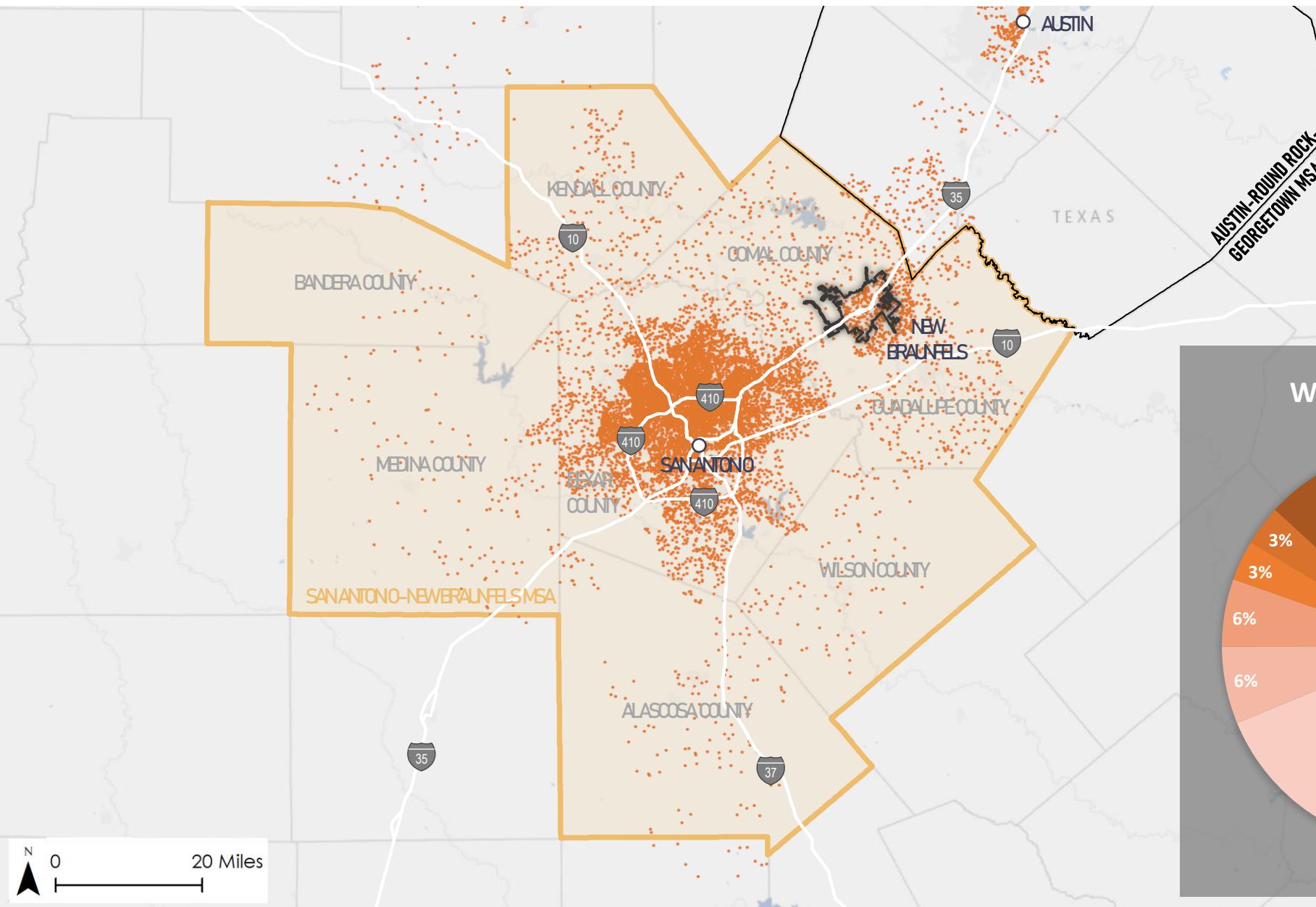
SAN ANTONIO METRO AREA

Where Workers Live



SAN ANTONIO METRO AREA

Where Residents Are Employed



EMPLOYMENT BY INDUSTRY

Comal County

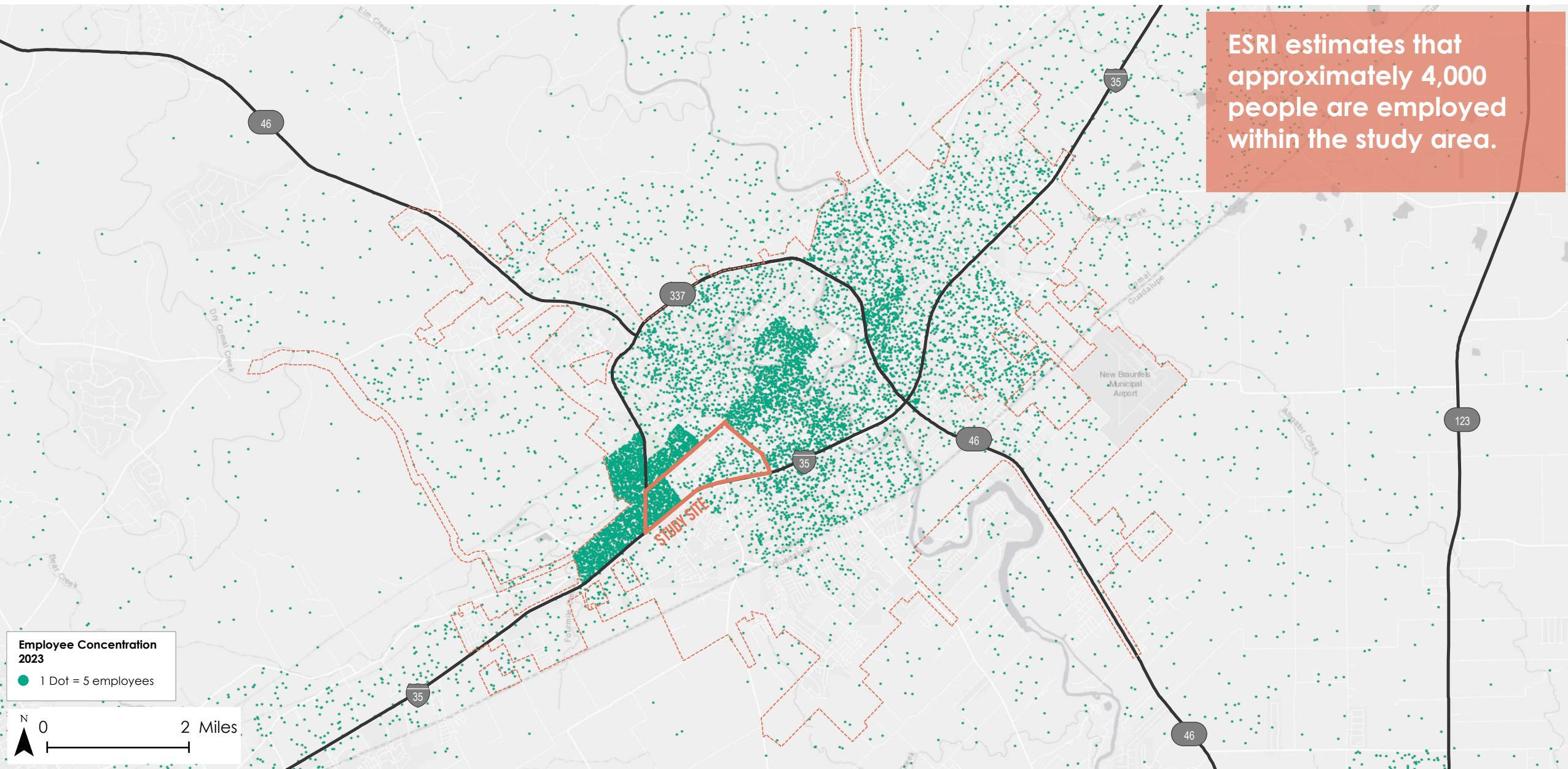
NAICS Code - Industry	Employment: Comal County			
	2015 - Q4	2021 - Q4	Change	Annual % Change
11 - Agriculture	62	118	56	18.1%
21 - Mining	541	716	175	6.5%
22 - Utilities	332	524	192	11.6%
23 - Construction	5,535	8,445	2,910	10.5%
31-33 - Manufacturing	3,271	3,732	461	2.8%
42 - Wholesale Trade	2,045	3,456	1,411	13.8%
44-45 - Retail Trade	6,508	8,412	1,904	5.9%
48-49 - Transportation and Warehousing	2,425	4,219	1,794	14.8%
51 - Information	481	560	79	3.3%
52 - Finance and Insurance	738	1,138	400	10.8%
53 - Real Estate and Leasing	478	890	412	17.2%
54 - Professional, Scientific, and Technical Services	1,805	2,548	743	8.2%
55 - Management of Companies and Enterprises	757	957	200	5.3%
56 - Administrative, Support, and Waste Services	2,116	3,231	1,115	10.5%
61 - Educational Services	4,861	5,905	1,044	4.3%
62 - Health Care and Social Assistance	5,252	6,077	825	3.1%
71 - Arts, Entertainment, and Recreation	1,347	1,327	(20)	-0.3%
72 - Accommodation and Food Services	5,500	6,508	1,008	3.7%
81 - Other Services (except Public Administration)	1,546	2,268	722	9.3%
92 - Public Administration	618	731	113	3.7%
Total, All Industries	46,218	61,762	15,544	6.7%

Job growth in Comal County has been very strong at over 6% annually since 2015.

Construction and Retail Trade are currently the largest industries.

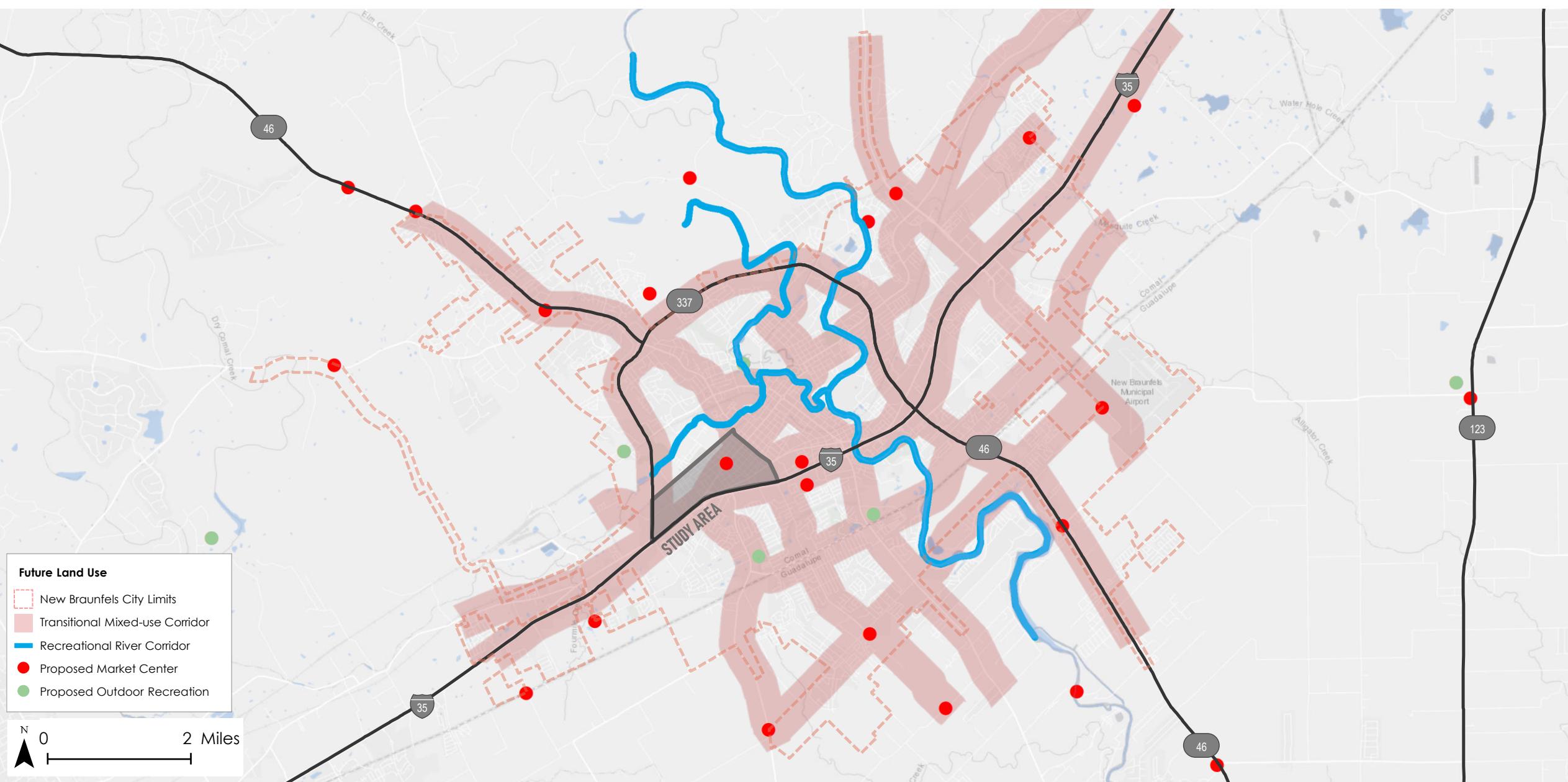
Notably, industries such as retail trade and accommodation/food services have been growing.

EMPLOYEE CONCENTRATION 2023



STUDY AREA

Future Land Use



EARLY ECONOMIC TAKEAWAYS

- The New Braunfels ***economy is strong and growing a rapid clip***. The rate of growth puts New Braunfels in the company of some of the fastest growing economies in the nation.
- The I-35 corridor is a ***major economic engine*** connecting New Braunfels to the larger metro markets of San Antonio and Austin.
- A ***large number of workers are commuting on I-35*** between New Braunfels and San Antonio (in both directions). The study area with its close proximity and easy access from the interstate should be able to benefit from this activity.
- There is a ***small commercial cluster*** at the intersection of Spur and West San Antonio Streets that could ***potentially be improved and expanded*** as part of this planning effort.

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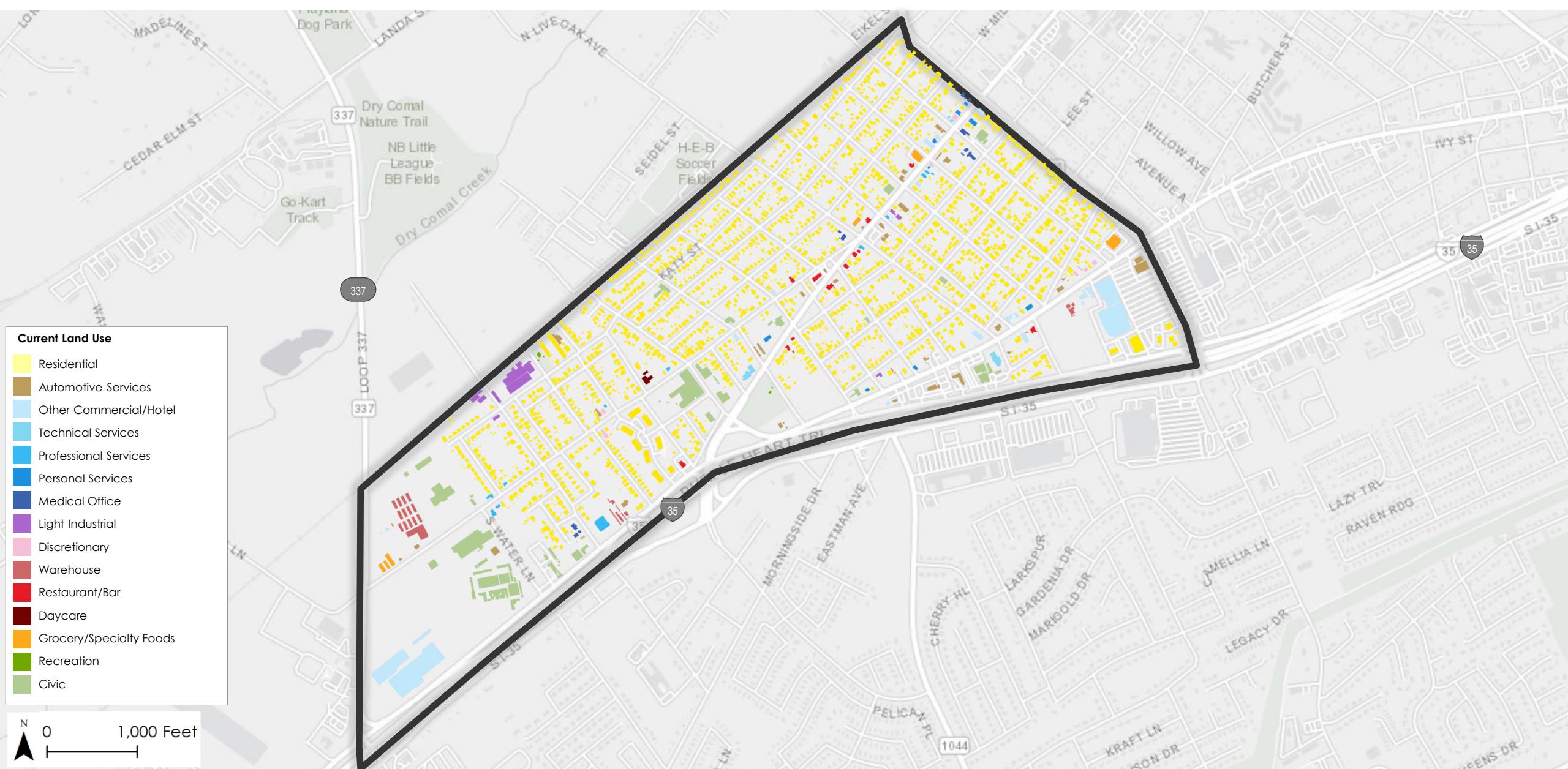
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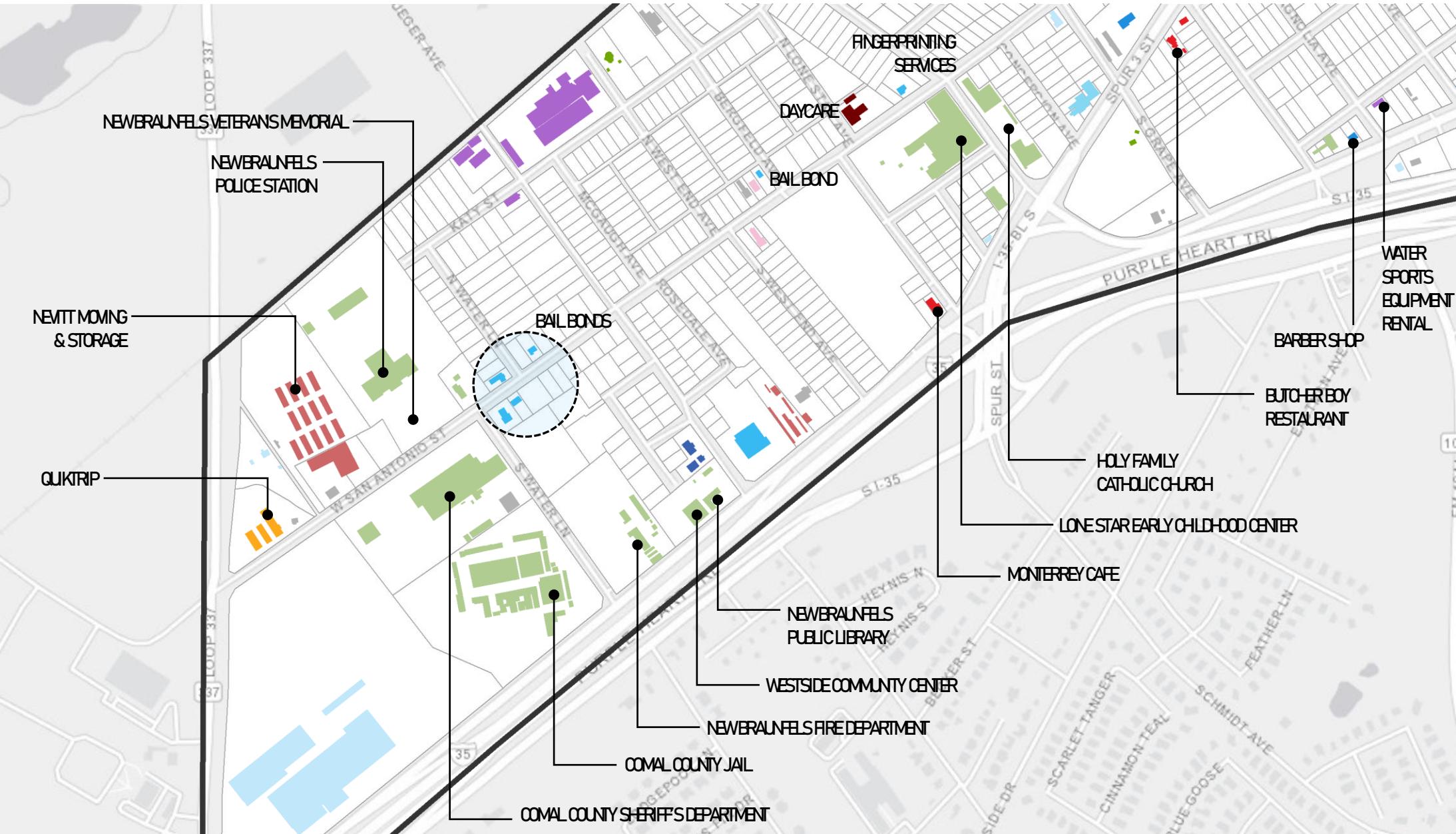
STUDY AREA

Current Land Use



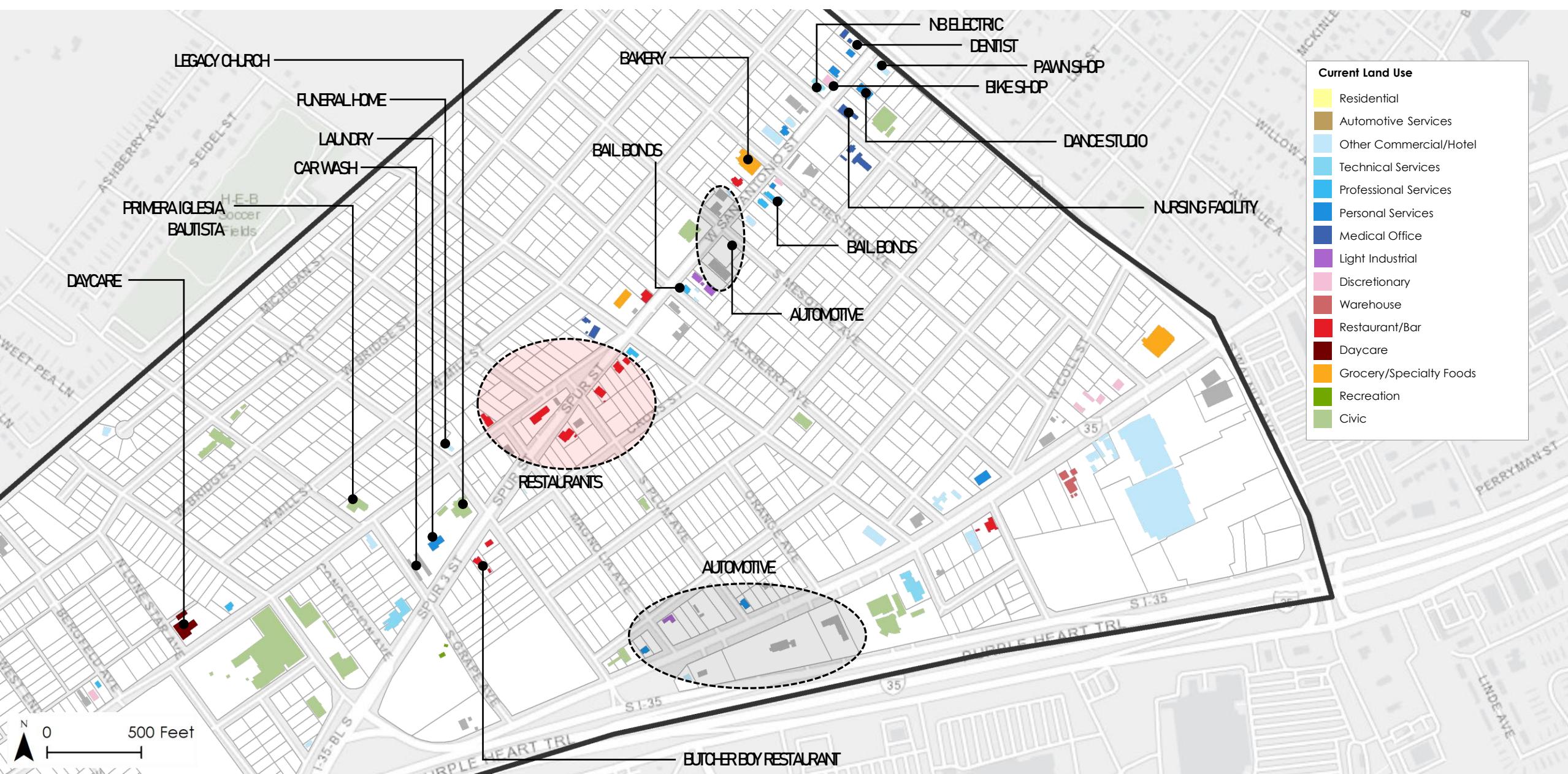
STUDY AREA

Current Inventory



STUDY AREA

Current Inventory



DISTRIBUTION OF SQUARE FOOTAGE

By Use

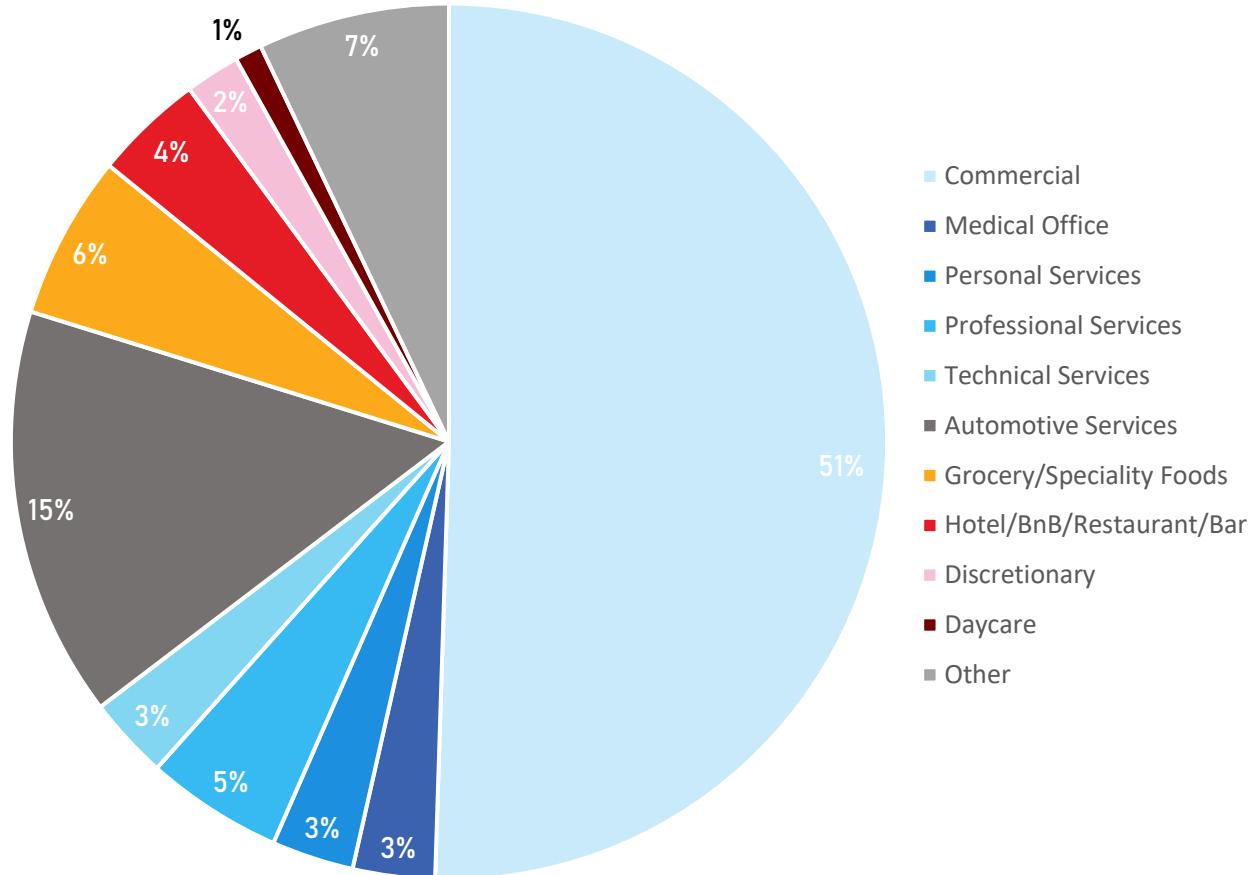
Use	Total	Percent of total GSF	Description
Residential	2,396,354	63%	<i>homestead, single-family, multifamily, apartments</i>
Personal Services	20,929	1%	<i>hair salon, barber, nail salon</i>
Civic	476,591	13%	<i>public facilities, church, school</i>
Automotive Services	111,175	3%	<i>body shop, mechanic, gas station, taxi, auto school</i>
Grocery/Speciality Foods	44,545	1%	<i>convenience store, market, liquor store</i>
Hotel/BnB/Restaurant/Bar	32,633	1%	<i>sit down restaurants, fast casual restaurants, bars</i>
Medical Office	23,932	1%	<i>dentist, nursing services, chiropractor, acupunctrist</i>
Professional Services	35,246	1%	<i>bail bonds, insurance, tax, law</i>
Technical Services	23,754	1%	<i>electrician, plumbing</i>
Discretionary	15,909	0%	<i>cell phones, jewelry, flowers, motorcycle sales</i>
Daycare	8,906	0%	<i>daycare, after school</i>
Light Industrial	94,738	3%	
Warehouse	78,768	2%	
Recreation	3,485	0%	
Commercial	362,728	10%	<i>small retail, shopping mall, indoor adventure</i>
Other	52,634	1%	<i>office space, dance studios, pet clinic, pawn shop</i>
Total GSF	3,782,327		
Total Commercial Use GSF	732,391		

Notes: Gross square footage (GSF) estimated using New Braunfels ArcGIS building footprints, does not reflect leasable square footage.

Source: New Braunfels Open Data 2023

DISTRIBUTION OF COMMERCIAL SQUARE FOOTAGE

By Use



- Commercial
- Medical Office
- Personal Services
- Professional Services
- Technical Services
- Automotive Services
- Grocery/Speciality Foods
- Hotel/BnB/Restaurant/Bar
- Discretionary
- Daycare
- Other

Use	Description
Commercial	small retail, shopping mall, indoor adventure
Medical Office	dentist, nursing services, chiropractor, acupunctrist
Personal Services	hair salon, barber, nail salon
Professional Services	bail bonds, insurance, tax, law
Technical Services	electrician, plumbing
Automotive Services	body shop, mechanic, gas station, taxi, auto school
Grocery/Speciality Foods	convenience store, market, liquor store
Hotel/BnB/Restaurant/Bar	sit down restaurants, fast casual restaurants, bars
Discretionary	cell phones, jewelry, flowers, motorcycle sales
Daycare	daycare, after school
Other	office space, dance studios, pet clinic, pawn shop

Notes: Gross square footage (GSF) estimated using New Braunfels ArcGIS building footprints, does not reflect leasable square footage.

Source: New Braunfels Open Data 2023

EARLY COMMERCIAL LAND USE TAKEAWAYS

- The commercial/retail uses in the study area are fairly ***spread out and lack a critical mass*** of activity.
- The small clustering of restaurants/food establishments near the intersection of Spur and West San Antonio Streets could potentially be ***improved/expanded*** to create more of a ***branded food destination*** with the district
- Bail ***bonds shops are scattered throughout*** the study area. They may detract from the other commercial uses along the corridor.
- Many of the commercial buildings fronting West San Antonio street ***read as residential buildings*** to drive by traffic. One can pass through the commercial area without really noticing it.
- The existing mix and quantity of small retail and restaurants in the district would be more effective if it was clustered in one area with ***quality signage, walkable streetscapes, and easy parking.***

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CURRENT POPULATION GROWTH 2010-2023

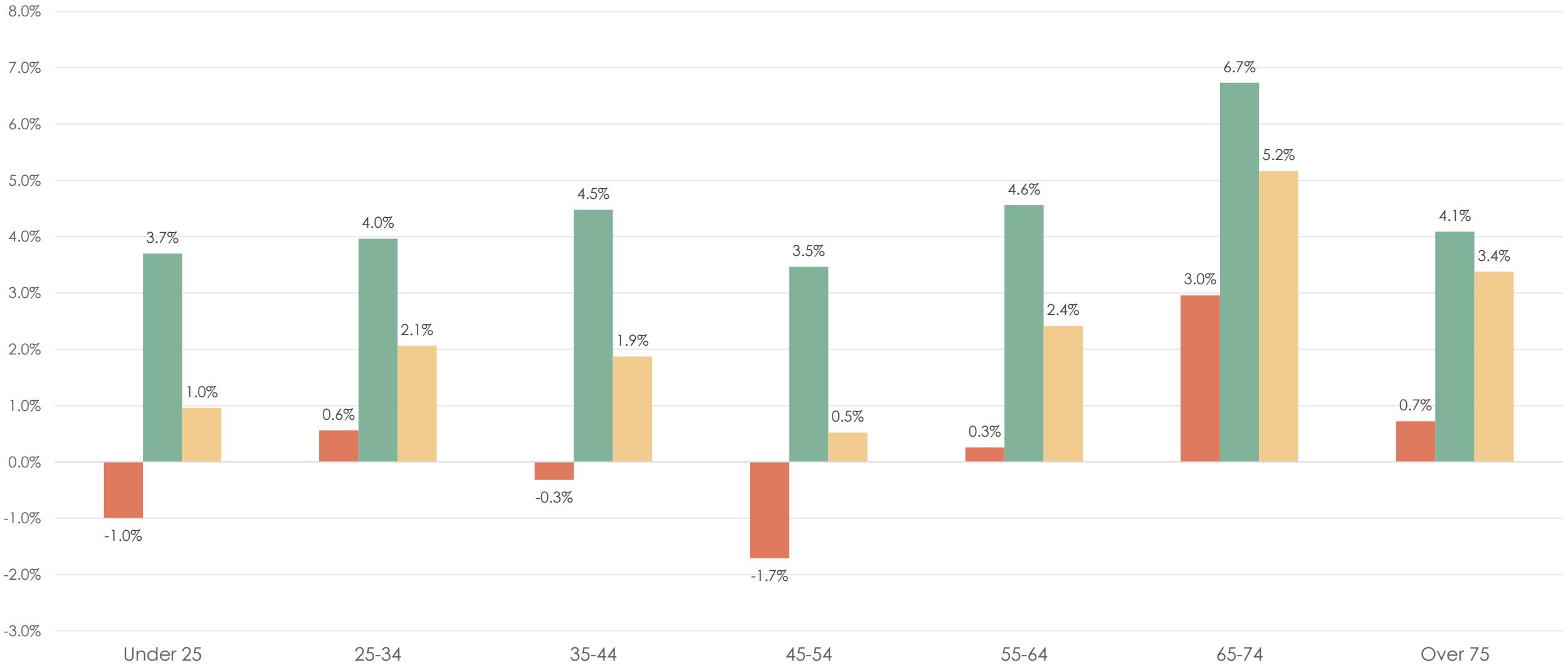
Total Growth in Numbers



CURRENT HOUSEHOLD GROWTH BY AGE 2010-2023

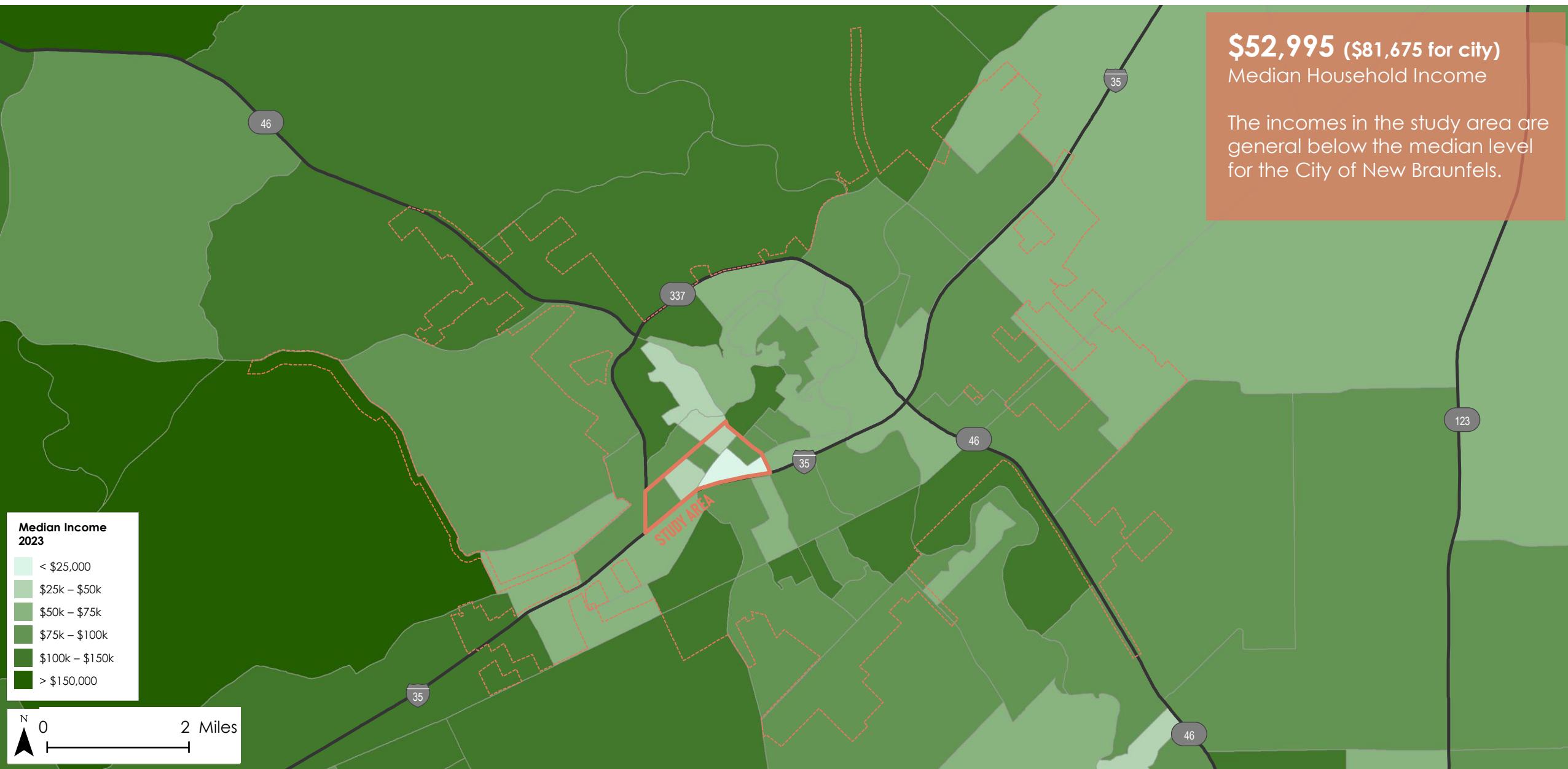
ESRI

■ Study Area ■ New Braunfels City, TX ■ San Antonio-New Braunfels MSA



MEDIAN HOUSEHOLD INCOME 2023

Current



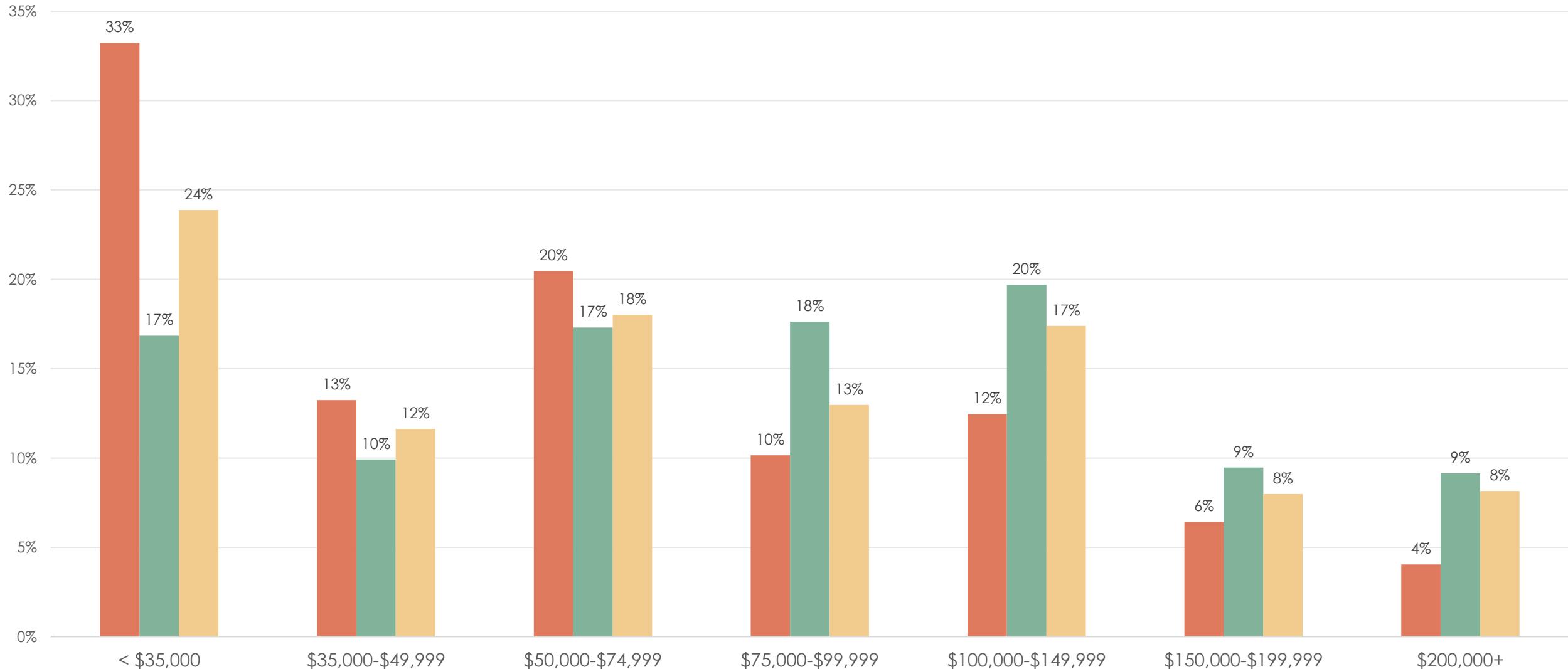
HOUSEHOLDS BY INCOME

(Current) ESRI

■ Study Area

■ New Braunfels City, TX

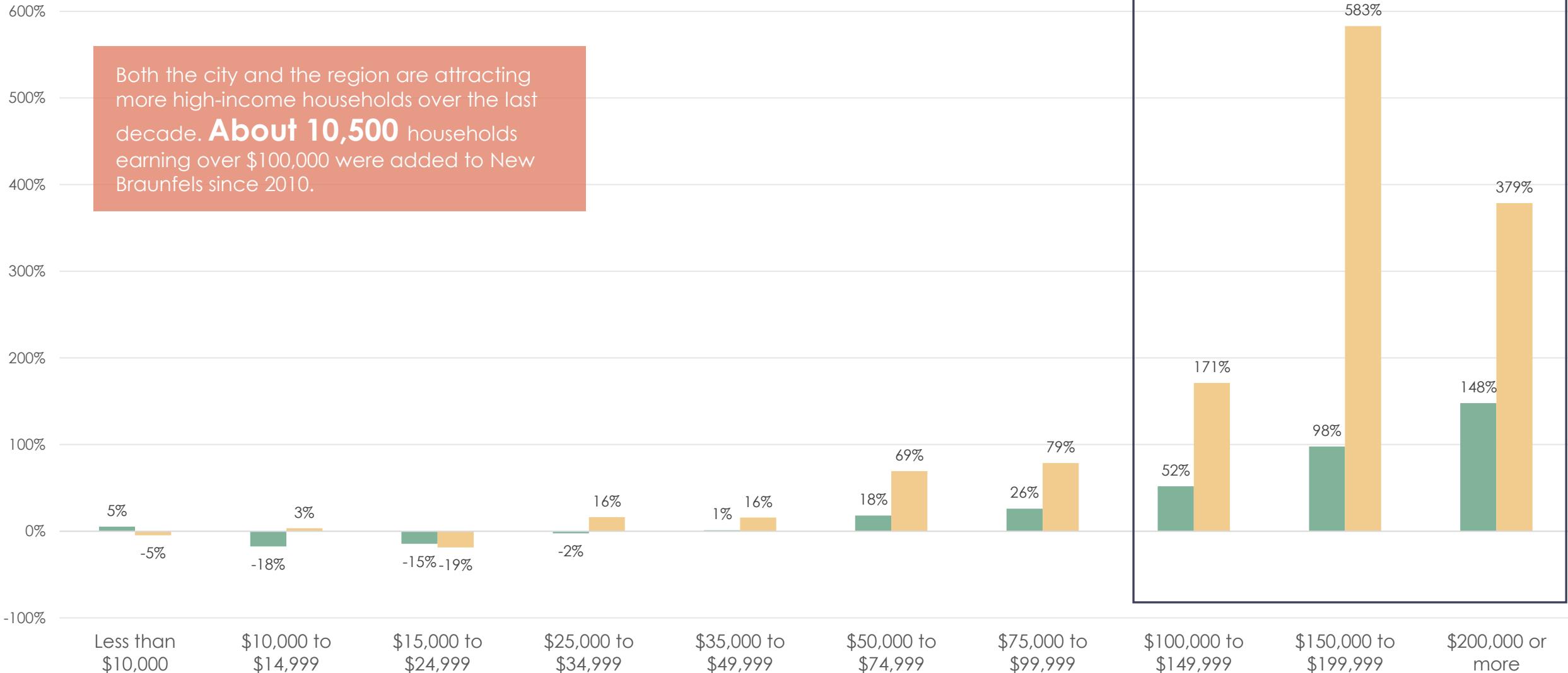
■ San Antonio-New Braunfels MSA



CHANGE IN HOUSEHOLDS BY INCOME 2010-2022

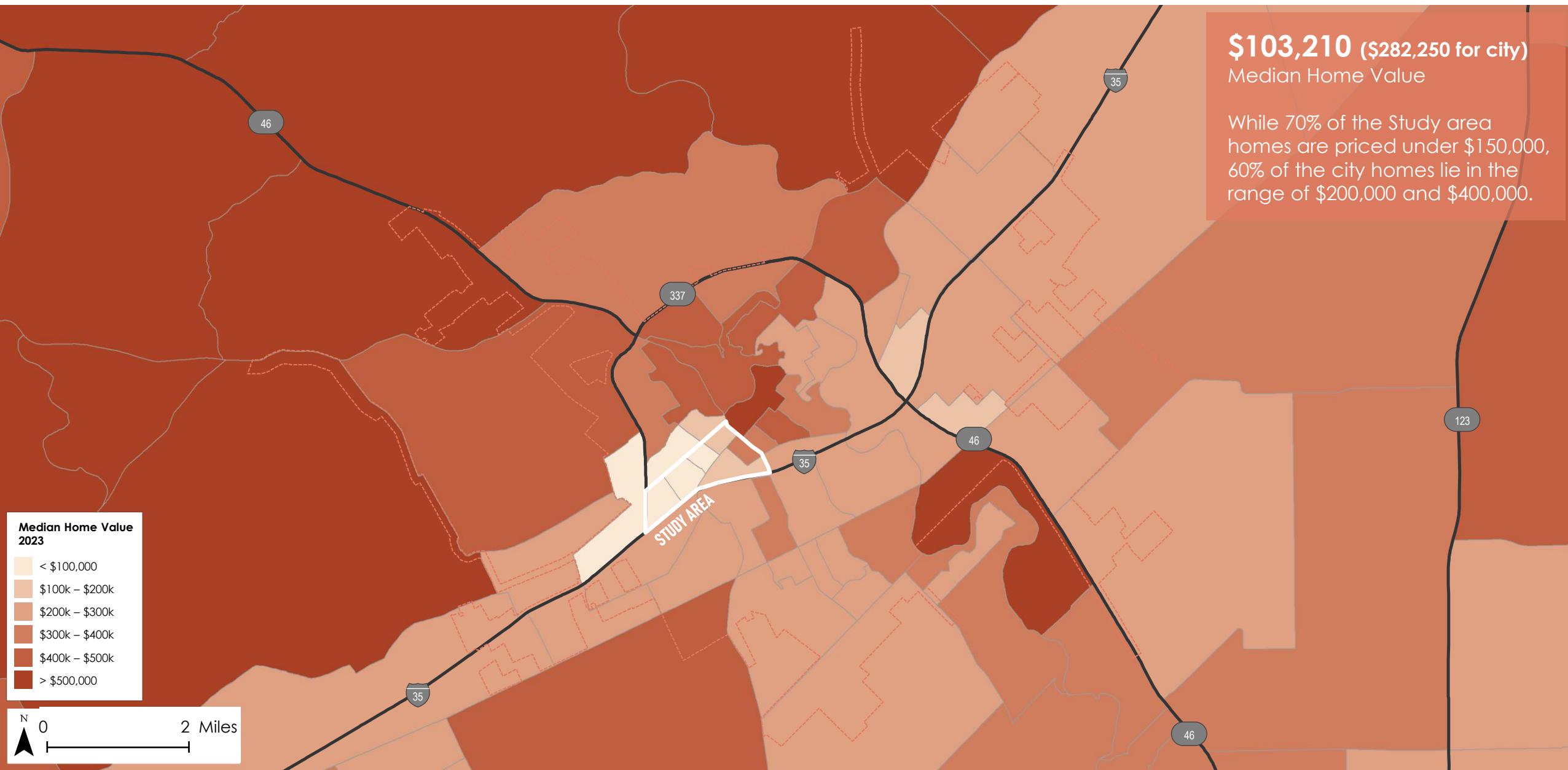
Current

■ New Braunfels City ■ San Antonio-New Braunfels MSA



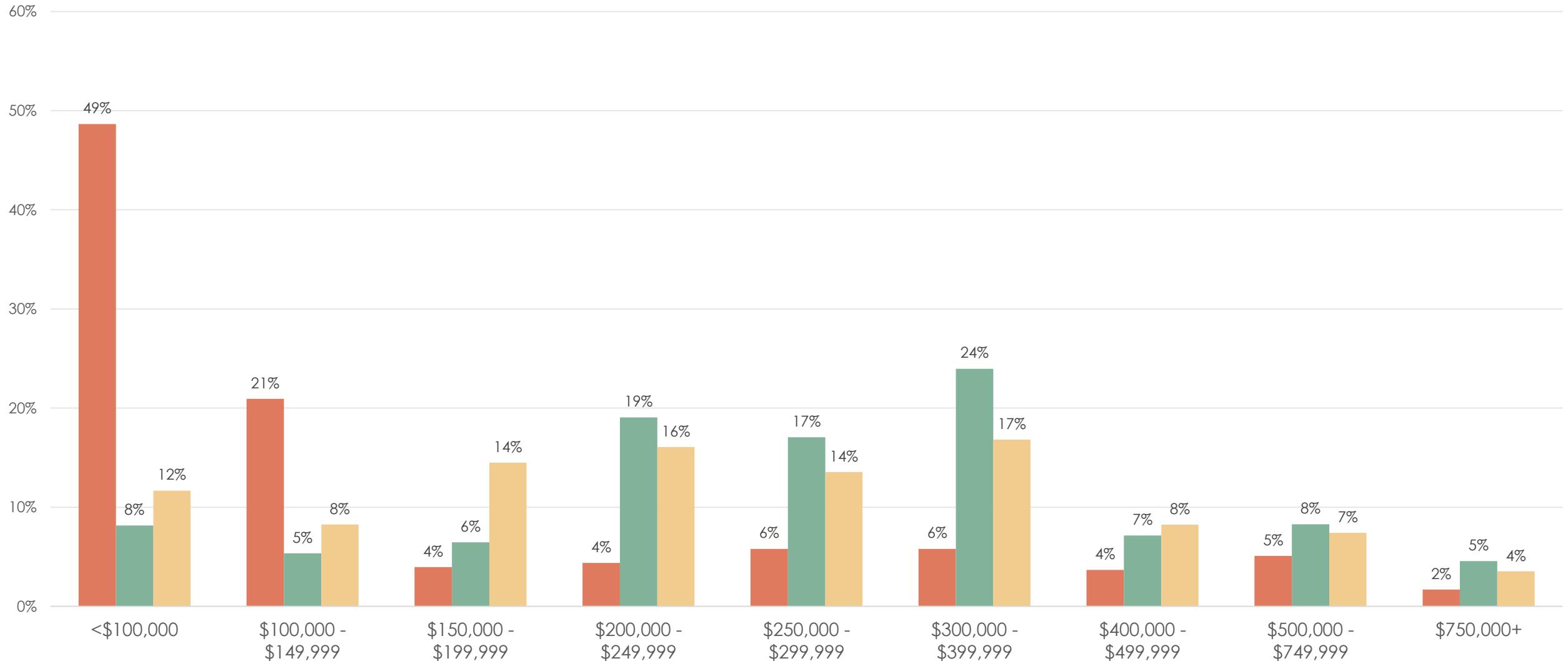
MEDIAN HOME VALUES 2023

Current

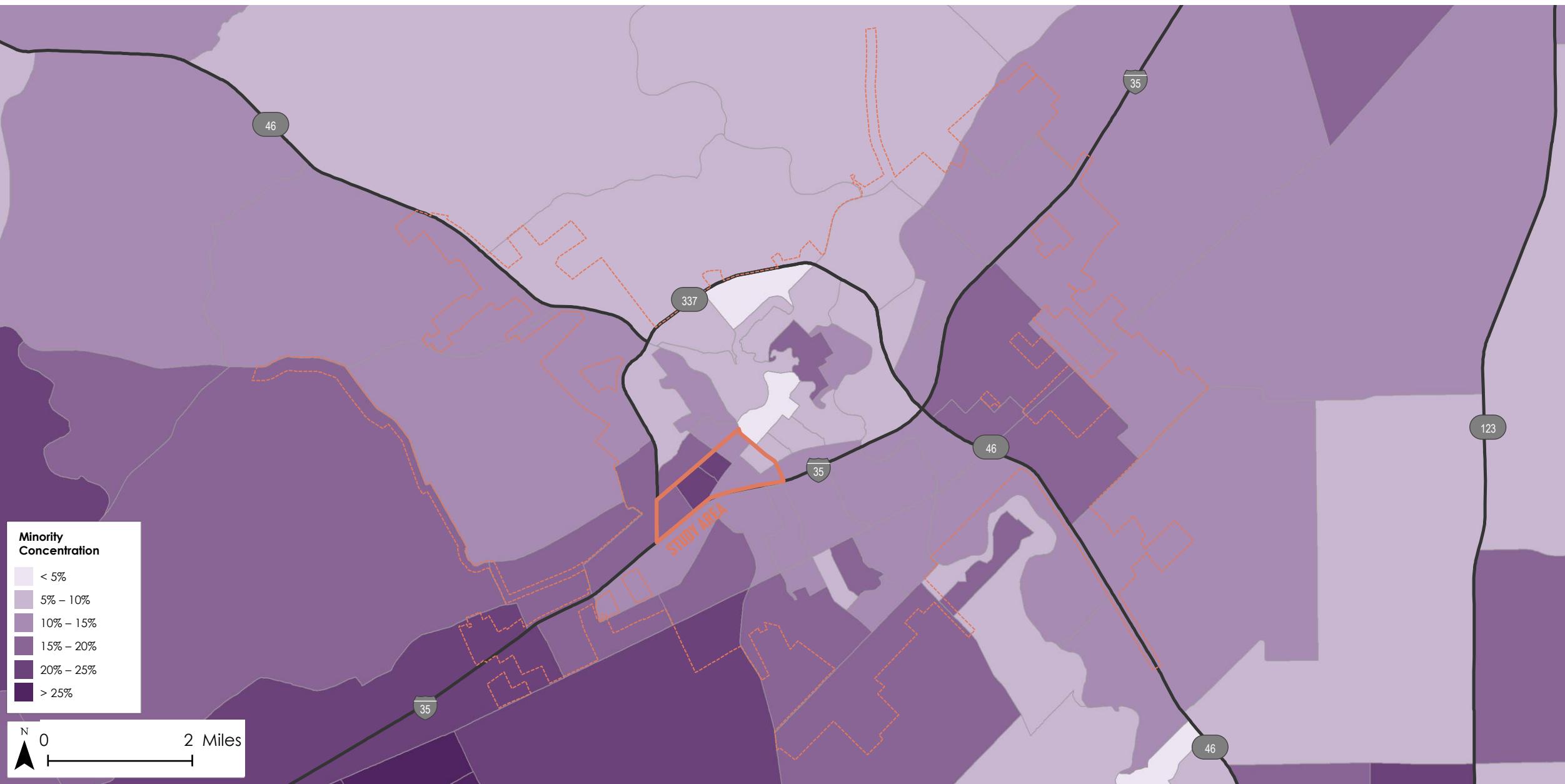


DISTRIBUTION OF HOME VALUES 2023

■ Study Area ■ New Braunfels City, TX ■ San Antonio-New Braunfels MSA



MINORITY CONCENTRATION

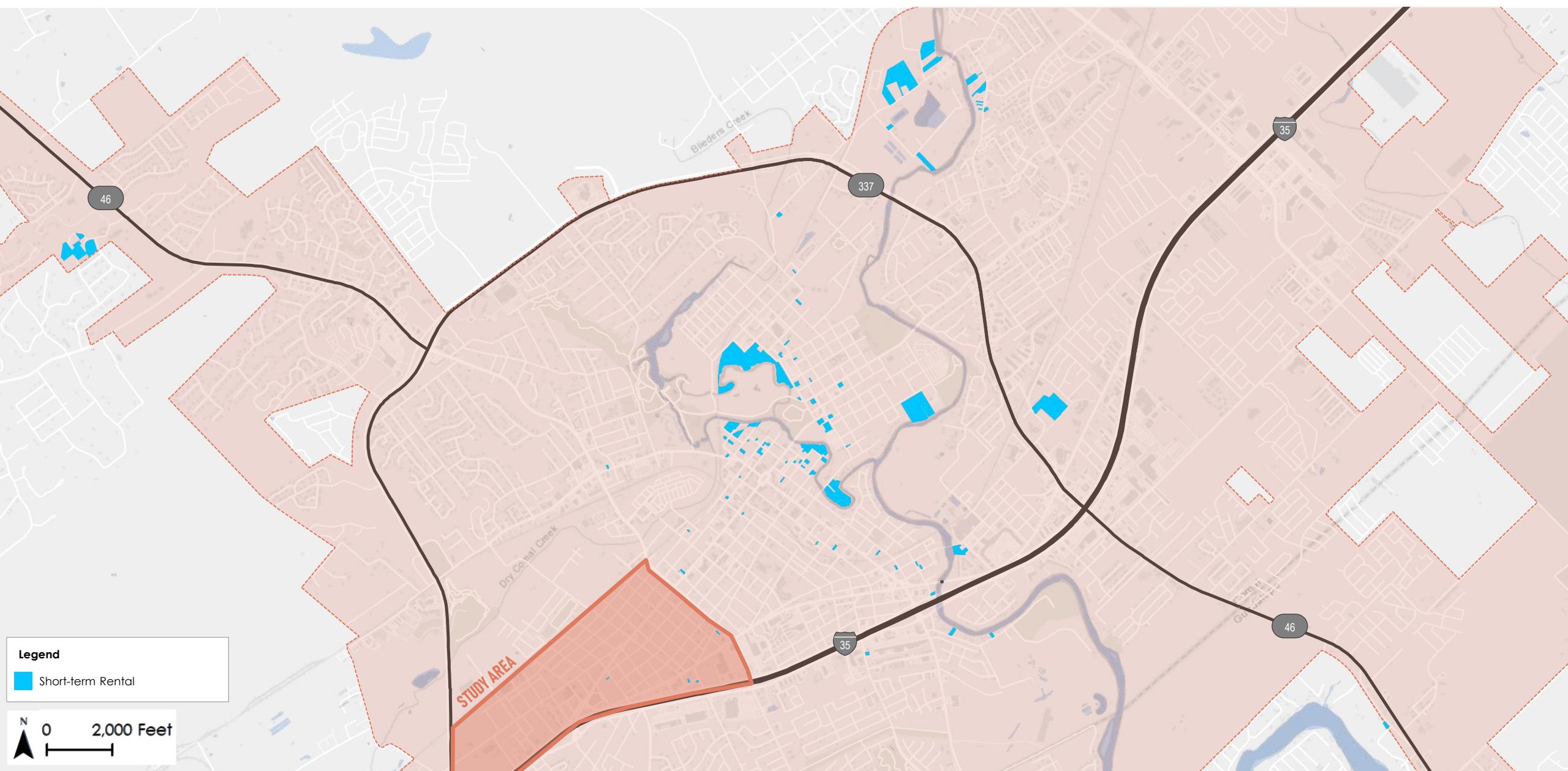


OWNER OCCUPIED UNITS 2023

Current



SHORT-TERM RENTALS Citywide



EARLY HOUSING TAKEAWAYS

- The study area is one of the ***last affordable areas within the City*** of New Braunfels. The eastern portion of the district is showing ***early signs of gentrification***.
- The study area is one of the ***most diverse portions*** of the City of New Braunfels.
- The study area has a relatively ***high home ownership*** and a low-level of short-term rental stock.
- ***ALL OF THE ABOVE ARE LIKELY TO CHANGE SIGNIFICANTLY IN THE SHORT TERM IF THE MARKET IS LEFT TO ITS OWN DEVICES***
- If the goal is to ***slow gentrification and preserve affordable home ownership*** opportunities within the study area, ***policy interventions are likely necessary***



NEW BRAUNFELS – WEST END MARKET TRENDS

