MOBILE ANALYSIS

New Braunfels, TX

OBJECTIVES & SOURCES

Buxton has developed the following analysis to determine the New Braunfels visitors:

- Capture mobile device IDs to identify visitors' home locations
- Append Mosaic segmentation to create visitor profiles
- Identify the top metro areas that source visitors

Mobile Data

- From Apr. 2017 to May. 2019, Buxton identified:
  - **54.9MM+ Pings within Areas of Interest**
  - **2.5MM+   Unique Visits to Areas of Interest**
  - **375,000+   Unique GPS Devices**
  - **166,801   Households included in analysis (Outside 35-mile radius)**

Bux*t*on

VISITOR PARAMETERS & RESULTING DATA

**Buxton has conducted the analysis using the following parameters:**

- Mobile devices collected for a customized list of areas of interest within New Braunfels
- All devices found within 35 miles from the centroid of New Braunfels were <u>excluded</u> from the analysis

Resulting Data:

- Overall household profiles of visitors within the New Braunfels areas of interest
- Household distribution by DMA of visitors within the New Braunfels areas of interest
- Index scores indicating how well New Braunfels is attracting visitors for each segment
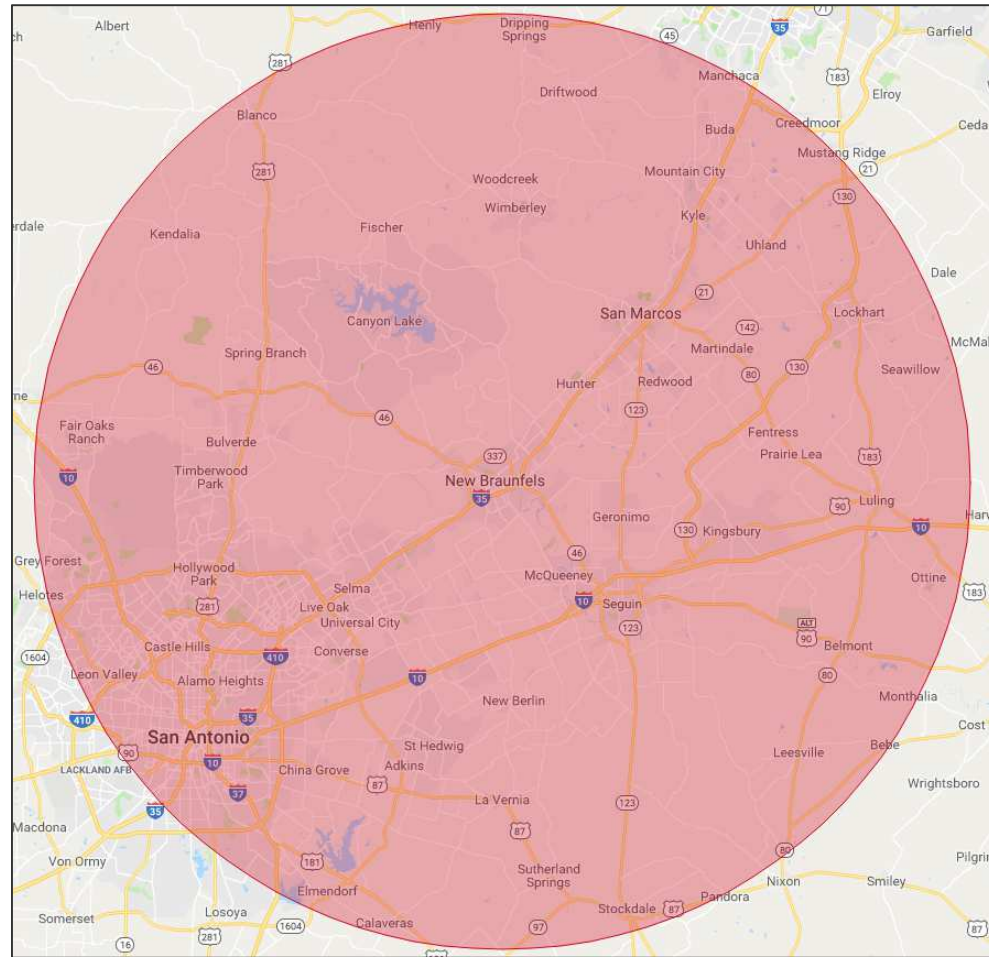- Visitor origin files for the areas of interest loaded to Scout as individual result layers

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STUDY AREAS OF INTEREST

The profiles, household distributions by DMA, and origin files were created for the areas of interest in the map below:
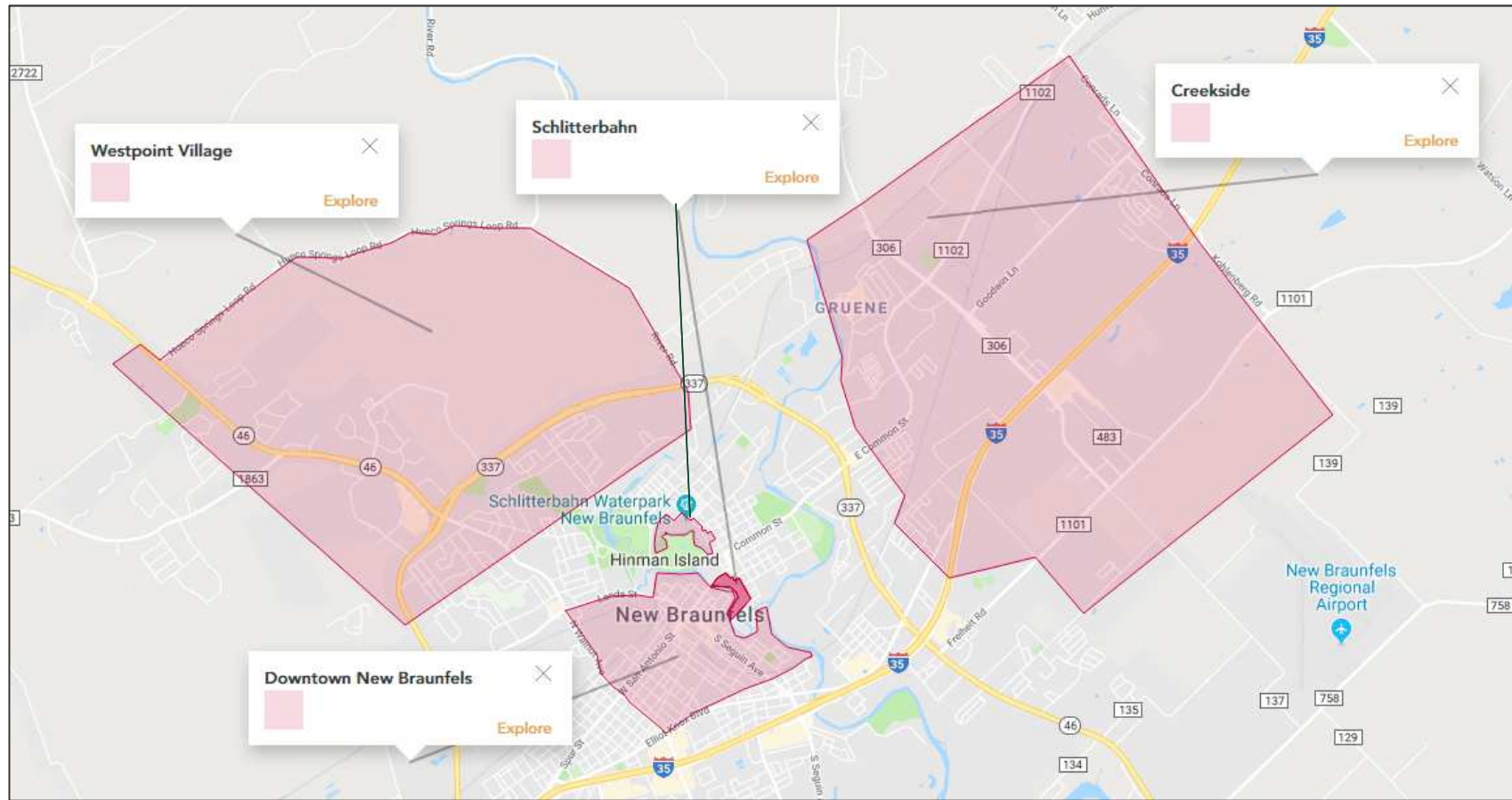
VISITOR DEFINED

New Braunfels has designated their visitor to be outside of a 35 mile radius mapped below:

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FINDINGS

Overall Household Profiles (Most Dominant Segments):

- All household profiles share a similar set of top segments
- Ethnically diverse (Hispanic)
- Bilingual
- Homeowners with single family properties
- Married with kids in household
- High likelihood of teenagers and ages 7-9 present in household
- Variable household incomes ranging $50,000 - $150,000
- Variable head of household age: 25 - 65

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FINDINGS

Household Distribution:

- Overall – Houston, Dallas-Fort Worth, and the portions of Austin and San Antonio outside of the 35-mile radius account for at least 64% of visits in each area of interest
  - Additional markets with significant representation include Waco-Temple-Bryan & Corpus Christi
  - Approximately 85% of visits for each area of interest are from the state of Texas
- Creekside
  - Austin and Dallas-Fort Worth markets account for nearly 40% of the visits
- Downtown New Braunfels
  - 35% of visits from the Houston and Dallas-Fort Worth markets
  - Balance of Austin and San Antonio account for an additional 30%
- Schlitterbahn
  - Houston, Dallas-Fort Worth, and balance of Austin generated nearly 60% of the visits
- Westpointe Village
  - Houston represents nearly 22% of the visits

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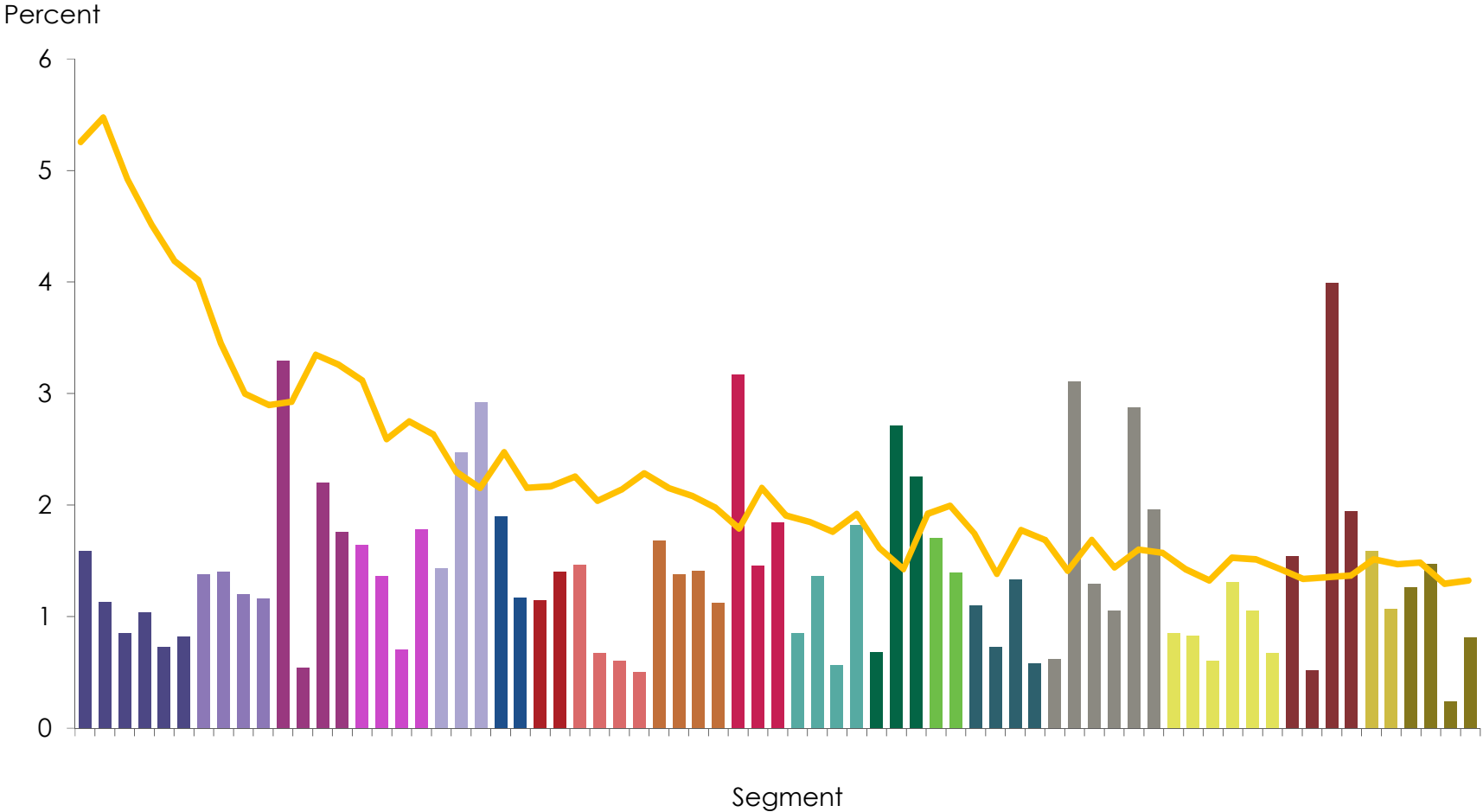# FINDINGS

Visitor Attraction:

- High index values* for the following:
  - Affluent incomes
  - Children in the household
  - Hispanic/Bilingual households
  - Young singles and recent college graduates

*Discussed in slide 22

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OVERALL HOUSEHOLD PROFILES

SEGMENTATION

All U.S. households are grouped into types based on demographics and **psychographics**

PROFILE YOUR VISITORS
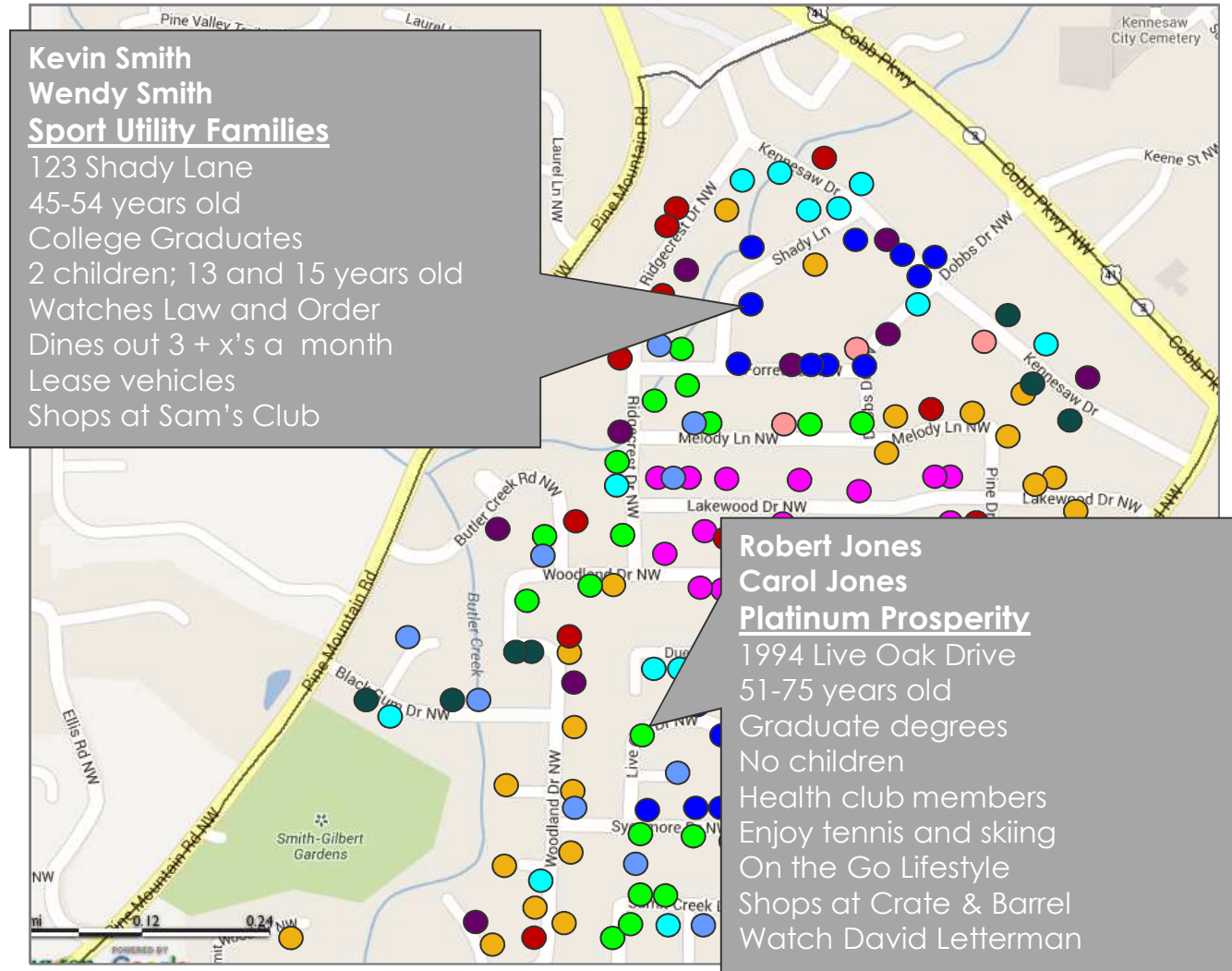
Granularity Comparison

There are 227,182 unique block
groups in the U.S.

There are 227,182 unique
household segments
within this small
geographic area

- 🟢 Platinum Prosperity
- 🟢 Flourishing Families
- 🔴 Boomers and Boomerangs
- 🔵 Sports Utility Families
- 🟣 Families Matter Most
- 🟣 For Please Make Home
- 🟠 Status Seeking Singles
- 🟠 Families Matter Most
- 🔵 Status Seeking Singles
- 🔵 Balance and Harmony
- 🟤 Aging in Place
- 🟤 Everyday Moderates
- 🔵 Balance and Harmony
- 🔴 Aging in Place
- 🟣 Rooted Flower Power
- 🔴 Touch of Tradition
- 🟢 Town Elders

Kevin Smith
Wendy Smith
Sport Utility Families
123 Shady Lane
45-54 years old
College Graduates
2 children; 13 and 15 years old
Watches Law and Order
Dines out 3 + x's a month
Lease vehicles
Shops at Sam's Club

Robert Jones
Carol Jones
Platinum Prosperity
1994 Live Oak Drive
51-75 years old
Graduate degrees
No children
Health club members
Enjoy tennis and skiing
On the Go Lifestyle
Shops at Crate & Barrel
Watch David Letterman

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CORE CONSUMERS

To be a top consumer segment, a segment must come close to or outperform its makeup within the visitor base. Top consumers are then differentiated as follows:

● **Primary Consumers (Index > 120)** have a high likelihood of being New Braunfels Visitors.

● **Secondary Consumers (Index > 100)** are more likely than average to be New Braunfels Visitors.

● **Tertiary Consumers (Index > 80)** are less likely to be New Braunfels Visitors, but should be considered opportunity segments that could be targeted to expand the Consumer base.
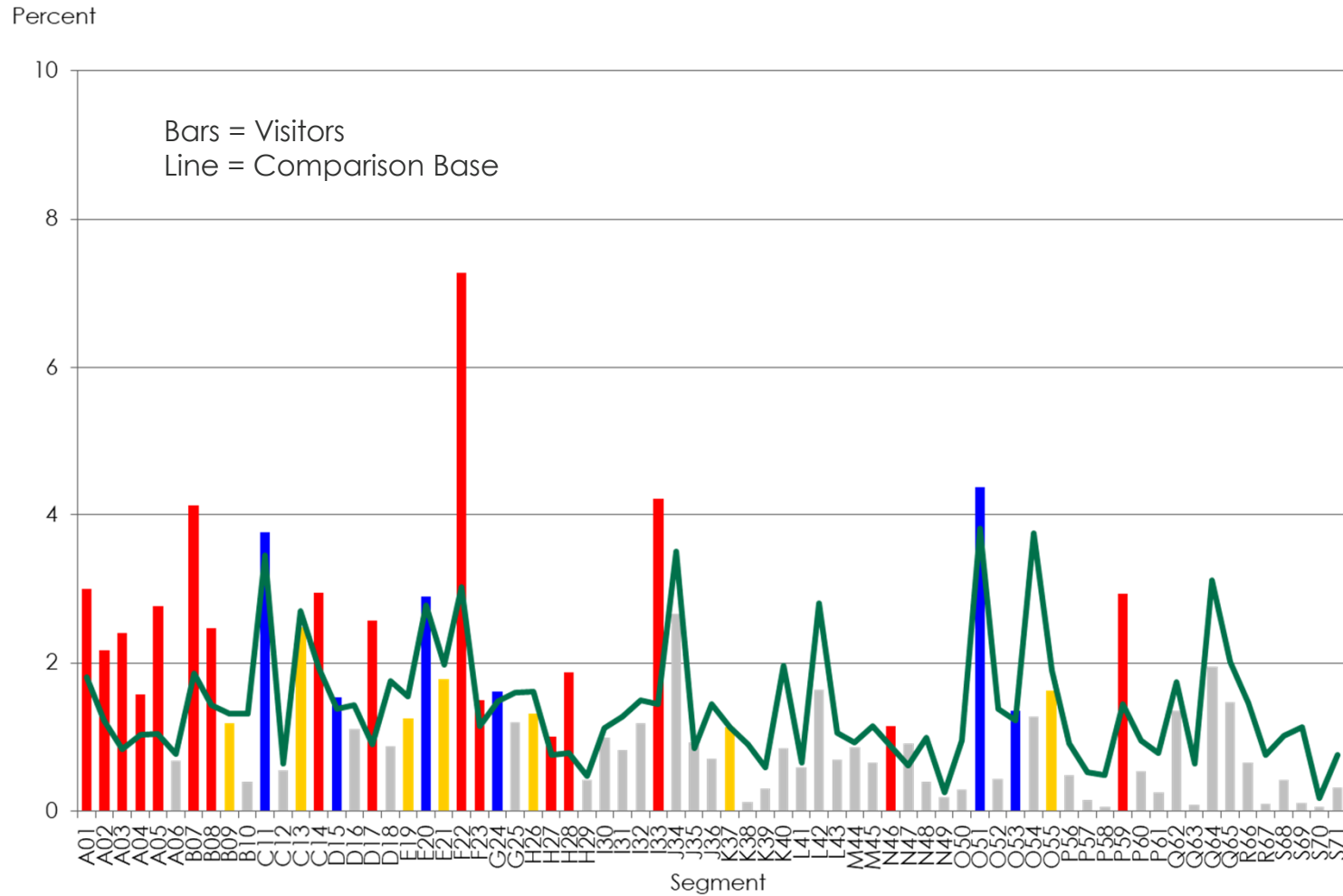
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HOUSEHOLD PROFILE

The psychographic profile of the households from the Mobile Analysis within Creekside.
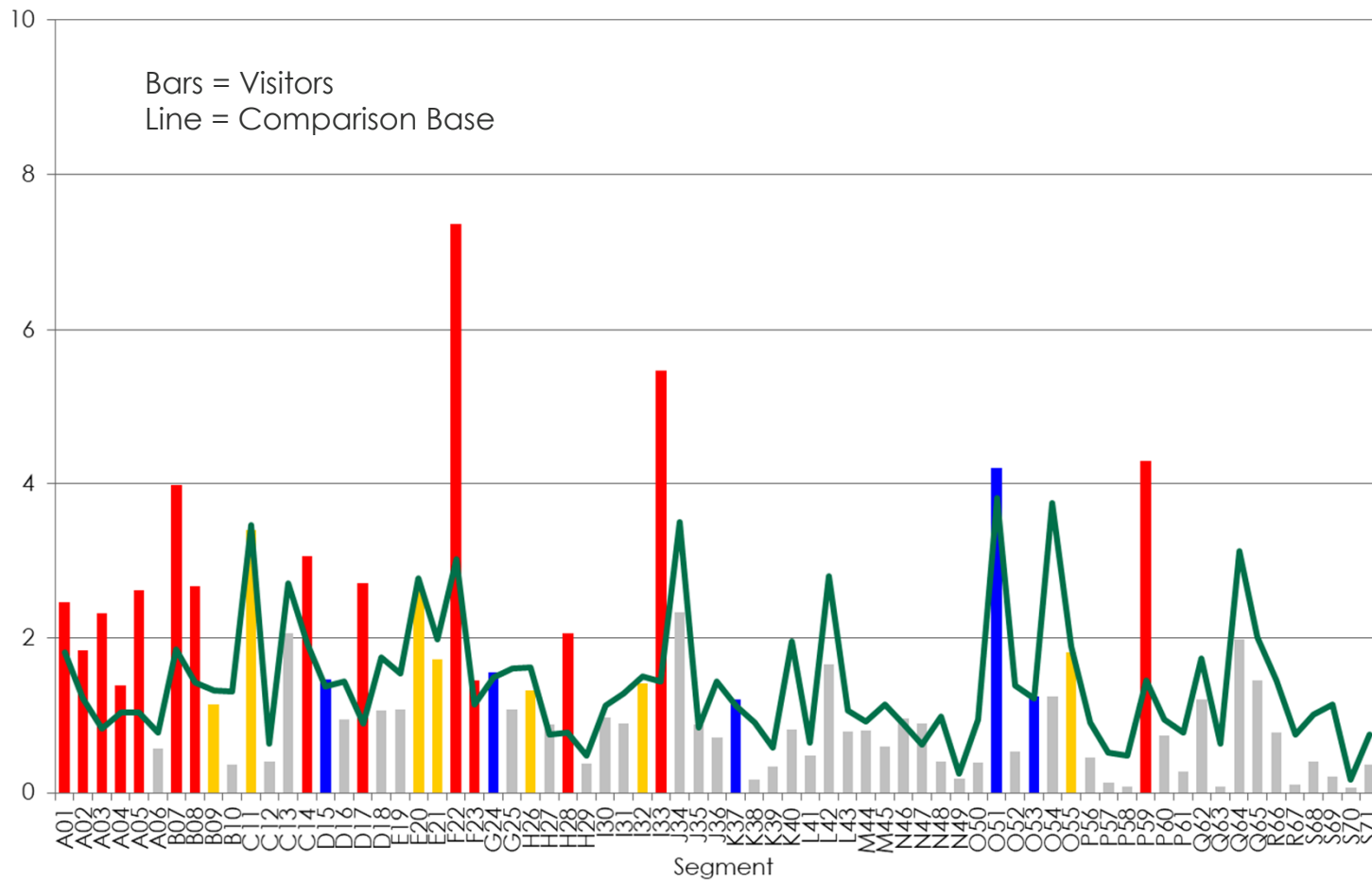
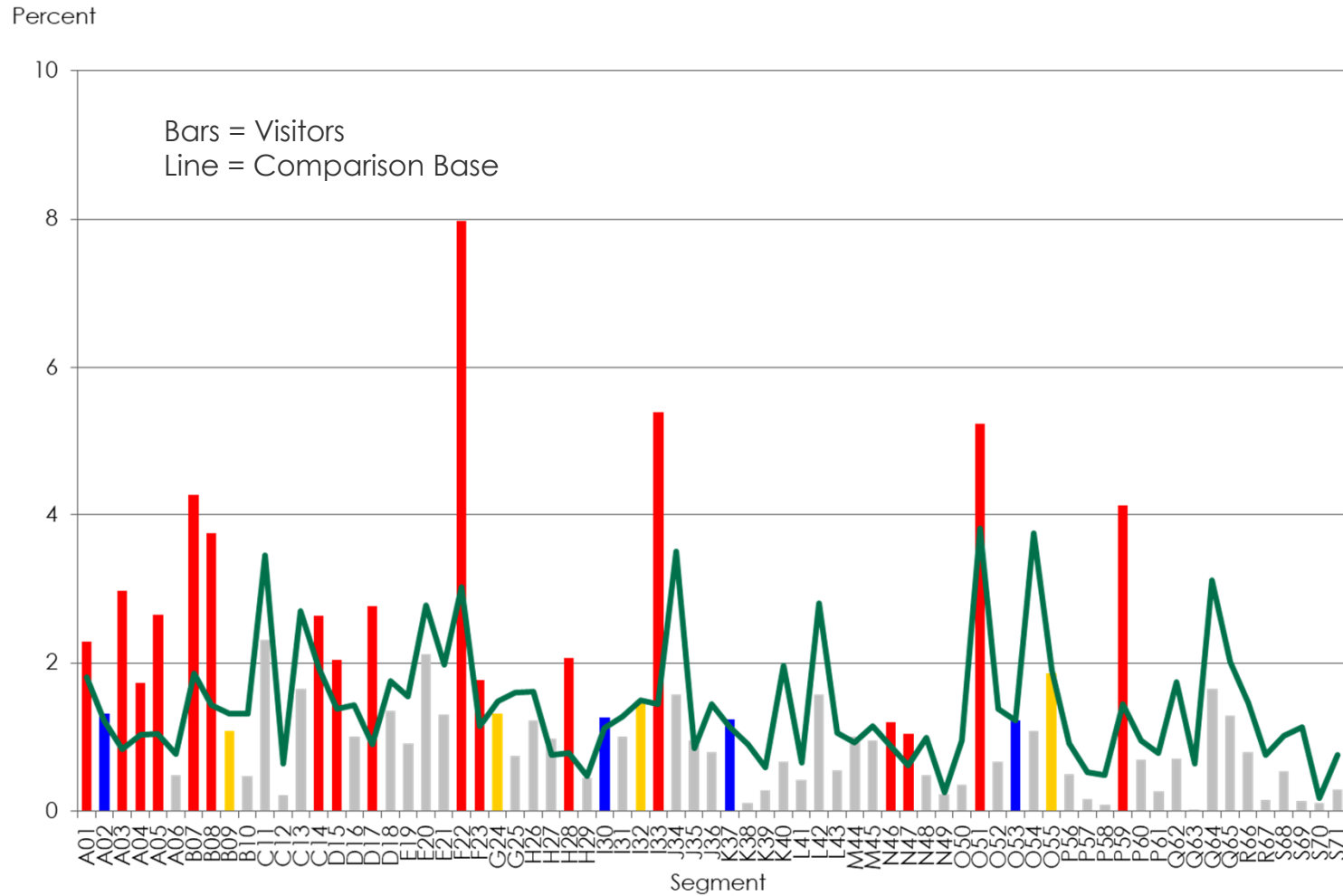Bars = Visitors
Line = Comparison Base

HOUSEHOLD PROFILE

The psychographic profile of the households from the Mobile Analysis within Downtown New Braunfels.

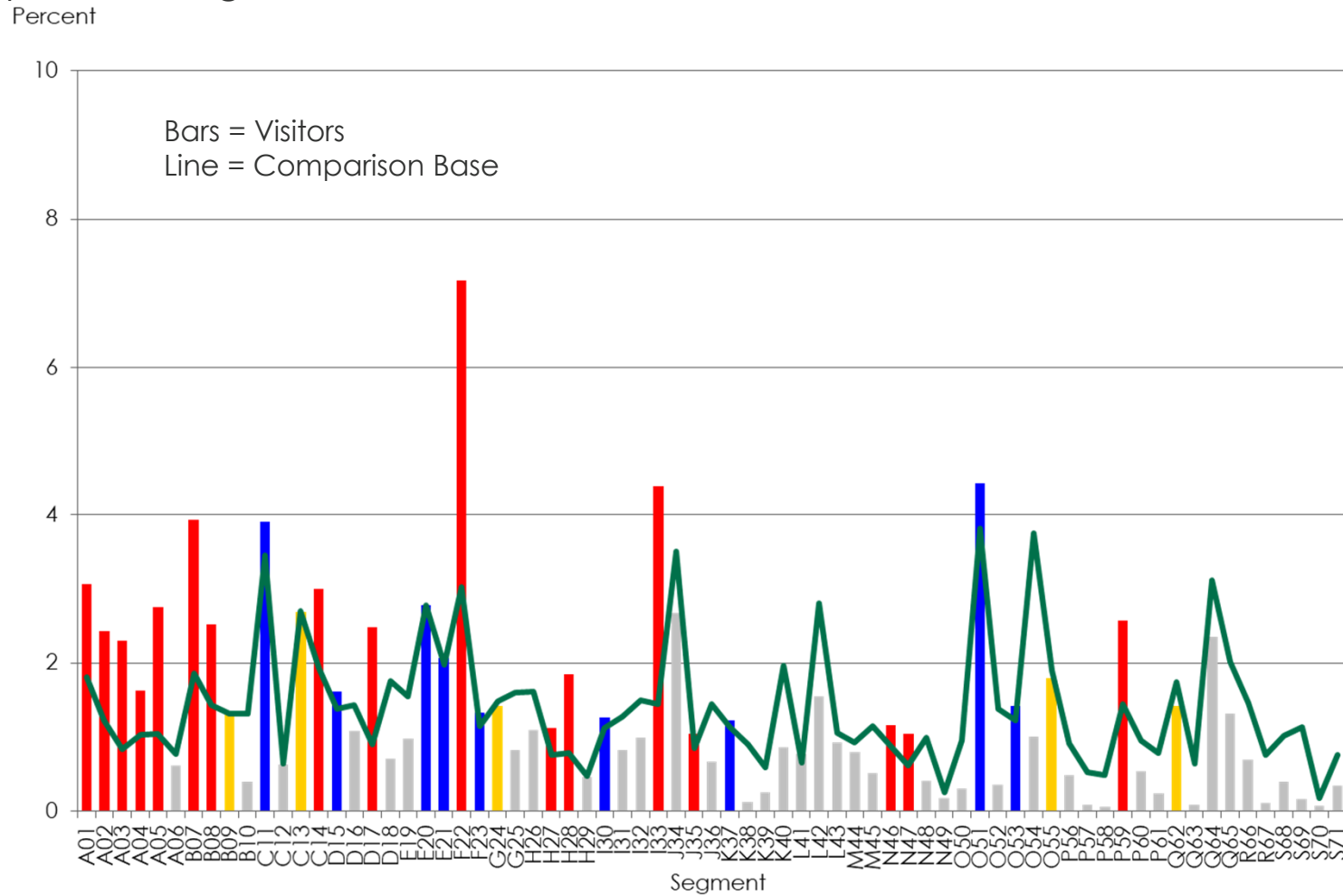# HOUSEHOLD PROFILE

The psychographic profile of the households from the Mobile Analysis within Schlitterbahn.

Percent

Bars = Visitors
Line = Comparison Base

Segment

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HOUSEHOLD PROFILE

The psychographic profile of the households from the Mobile Analysis within Westpointe Village.

Percent

Bars = Visitors
Line = Comparison Base

Segment

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HIGHLY REPRESENTED SEGMENTS

Creekside	Downtown New Braunfels	Westpointe Village	Schlitterbahn
7.36%	7.27%	7.17%	7.98%

HIGHLY REPRESENTED SEGMENTS

Creekside	Downtown New Braunfels	Westpointe Village	Schlitterbahn
5.48%	4.21%	4.39%	5.40%

HIGHLY REPRESENTED SEGMENTS

O51 Digital Dependents
Generation Y and X singles who live digital-driven, urban lifestyles

Tyler & Megan
4.24% | 2.64%

Who We Are

Head of household age
25–30
51.2%   453

Type of property
Single family
89.7%   113

Estimated household income
$50,000–$74,999
27.2%   143

Household size
1 person
71.8%   162

Home ownership
First-time buyer
15.7%   263

Age of children
7–9
7.5%   76

Key Features
- Ambitious
- Video gamers
- Single adults
- Eager to spend
- Music lovers
- Digitally savvy

Channel Preference
104   82   138
174   17   34

Technology Adoption
Wizards

Creekside	Downtown New Braunfels	Westpointe Village	Schlitterbahn
4.21%	4.37%	4.43%	5.24%

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HIGHLY REPRESENTED SEGMENTS

B07 Generational Soup
Affluent couples and multi-generational families living a wide range of lifestyles in suburbia

Mark & Deborah
🏠 1.29% | 1.95% 👤

Key Features
- Affluent
- Rooted in the suburbs
- Multi-generational households
- Fitness club members
- Outdoor hobbies
- Charitable donor

Who We Are ⓘ

Head of household age	Type of property
51–65	Single family
44.3% 158	99.4% 125

Estimated household income	Household size
$125,000–$149,999	5+ persons
20.4% 365	29.9% 248

Home ownership	Age of children
Homeowner	13–18
90.3% 141	27.2% 224

Channel Preference ⓘ
93   145   19
125   282   264

Technology Adoption ⓘ
Journeymen

Creekside	Downtown New Braunfels	Westpointe Village	Schlitterbahn
3.98%	4.13%	3.93%	4.27%

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SEGMENT INDICIES

SEGMENT INDICIES

The chart below displays the top segments for each area of interest. The embedded file provides the actual index for each segment.
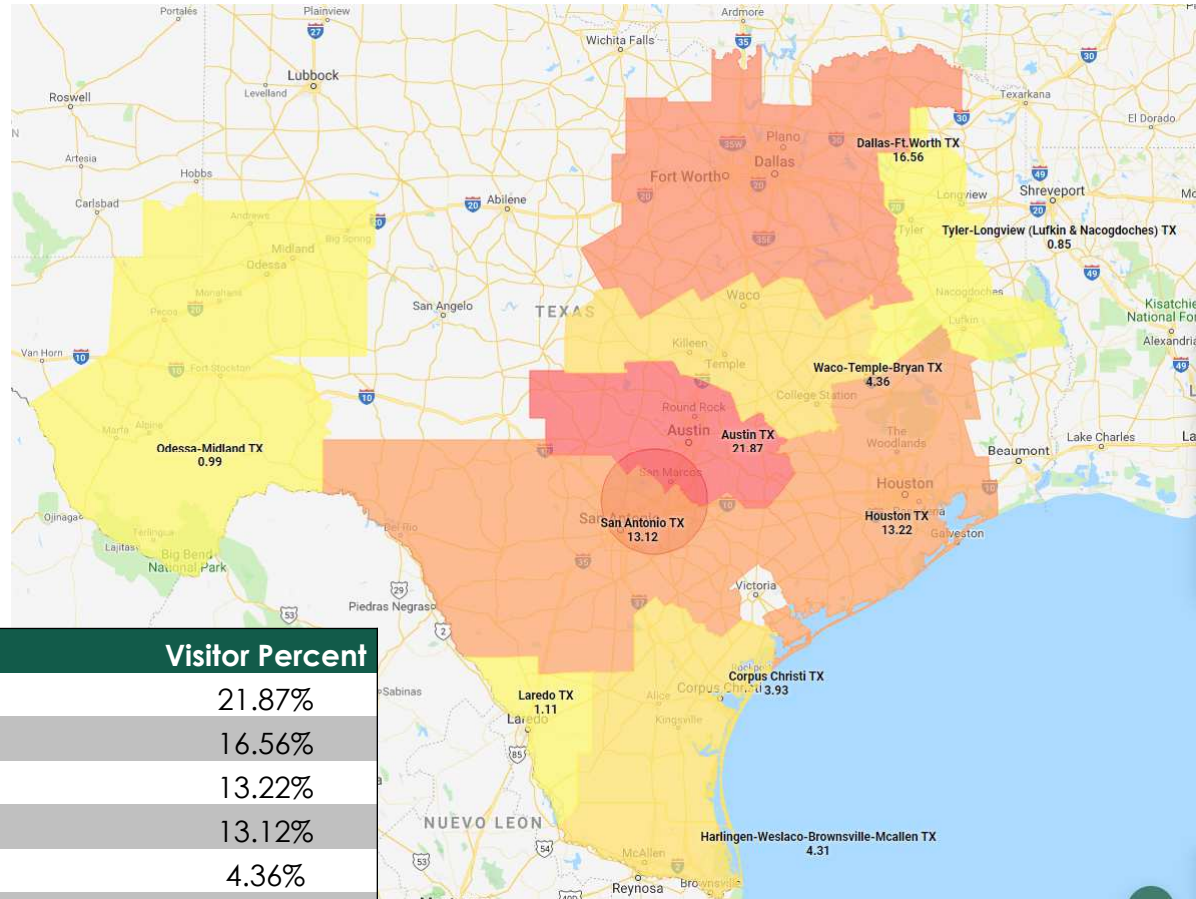
(dots color-coded: ● red, ● blue, ● yellow)

Segment	Creekside	Downtown New Braunfels	Schlitterbahn	Westpointe Village
A01: American Royalty	● red	● red	● red	● red
A02: Platinum Prosperity	● red	● red	● blue	● red
A03: Kids and Cabernet	● red	● red	● red	● red
A04: Picture Perfect Families	● red	● red	● red	● red
A05: Couples with Clout	● red	● red	● red	● red
B07: Generational Soup	● red	● red	● red	● red
B08: Babies and Bliss	● red	● red	● red	● red
B09: Family Fun-Tastic	● yellow	● yellow	● yellow	● yellow
C11: Aging of Aquarius	● yellow	● blue		● blue
C13: Silver Sophisticates		● yellow		● yellow
C14: Boomers and Boomerangs	● red	● red	● red	● red
D15: Sports Utility Families	● blue	● blue	● red	● blue
D17: Cul de Sac Diversity	● red	● red	● red	● red
E19: Full Pockets, Empty Nests		● yellow		
E20: No Place Like Home	● yellow	● blue		● blue
E21: Unspoiled Splendor	● yellow	● yellow		● blue
F22: Fast Track Couples	● red	● red	● red	● red
F23: Families Matter Most	● red	● red	● red	● blue
G24: Status Seeking Singles	● blue	● blue	● yellow	● yellow
H26: Progressive Potpourri	● yellow	● yellow		
H27: Birkenstocks and Beemers		● red		● red
H28: Everyday Moderates	● red	● red	● red	● red
I30: Stockcars and State Parks			● blue	● blue
I32: Latin Flair	● yellow		● yellow	
I33: Hispanic Harmony	● red	● red	● red	● red
J35: Rural Escape				● red
K37: Wired for Success	● blue	● yellow	● blue	● blue
N46: True Grit Americans		● red	● red	● red
N47: Countrified Pragmatics			● red	● red
O51: Digital Dependents	● blue	● blue	● red	● blue
O53: Colleges and Cafes	● blue	● blue	● blue	● blue
O55: Family Troopers	● yellow	● yellow	● yellow	● yellow
P59: Nuevo Horizons	● red	● red	● red	● red
Q62: Reaping Rewards				● yellow

Segment Indicies

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HOUSEHOLD DISTRIBUTION BY DMA

CREEKSIDE

DMA	Visitor Percent
Austin TX	21.87%
Dallas-Ft.Worth TX	16.56%
Houston TX	13.22%
San Antonio TX	13.12%
Waco-Temple-Bryan TX	4.36%
Harlingen-Weslaco-Brownsville-Mcallen TX	4.31%
Corpus Christi TX	3.93%
Laredo TX	1.11%
Odessa-Midland TX	0.99%
Tyler-Longview (Lufkin & Nacogdoches) TX	0.85%

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DOWNTOWN NEW BRAUNFELS
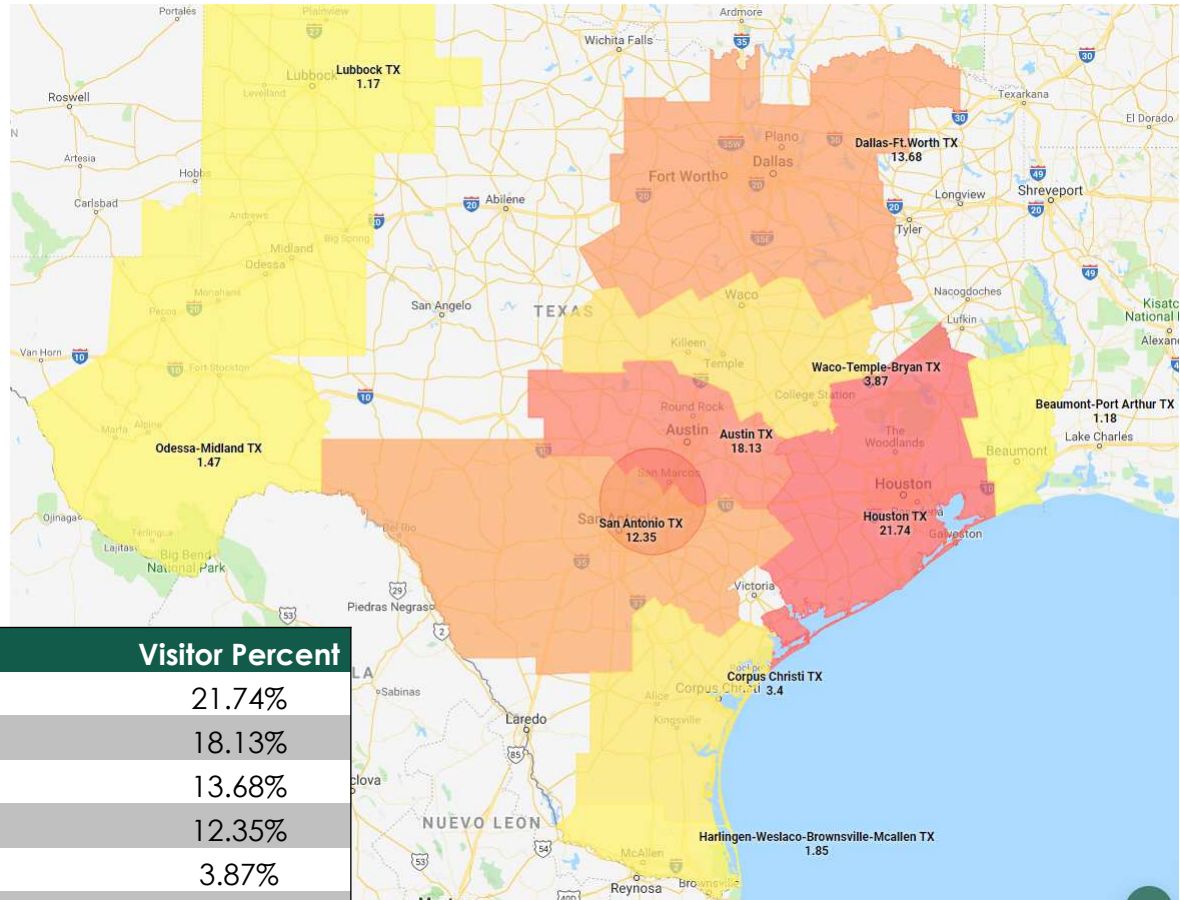
DMA	Visitor Percent
Houston TX	21.74%
Austin TX	18.13%
Dallas-Ft.Worth TX	13.68%
San Antonio TX	12.35%
Waco-Temple-Bryan TX	3.87%
Corpus Christi TX	3.40%
Harlingen-Weslaco-Brownsville-Mcallen TX	1.85%
Odessa-Midland TX	1.47%
Beaumont-Port Arthur TX	1.18%
Lubbock TX	1.17%

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SCHLITTERBAHN
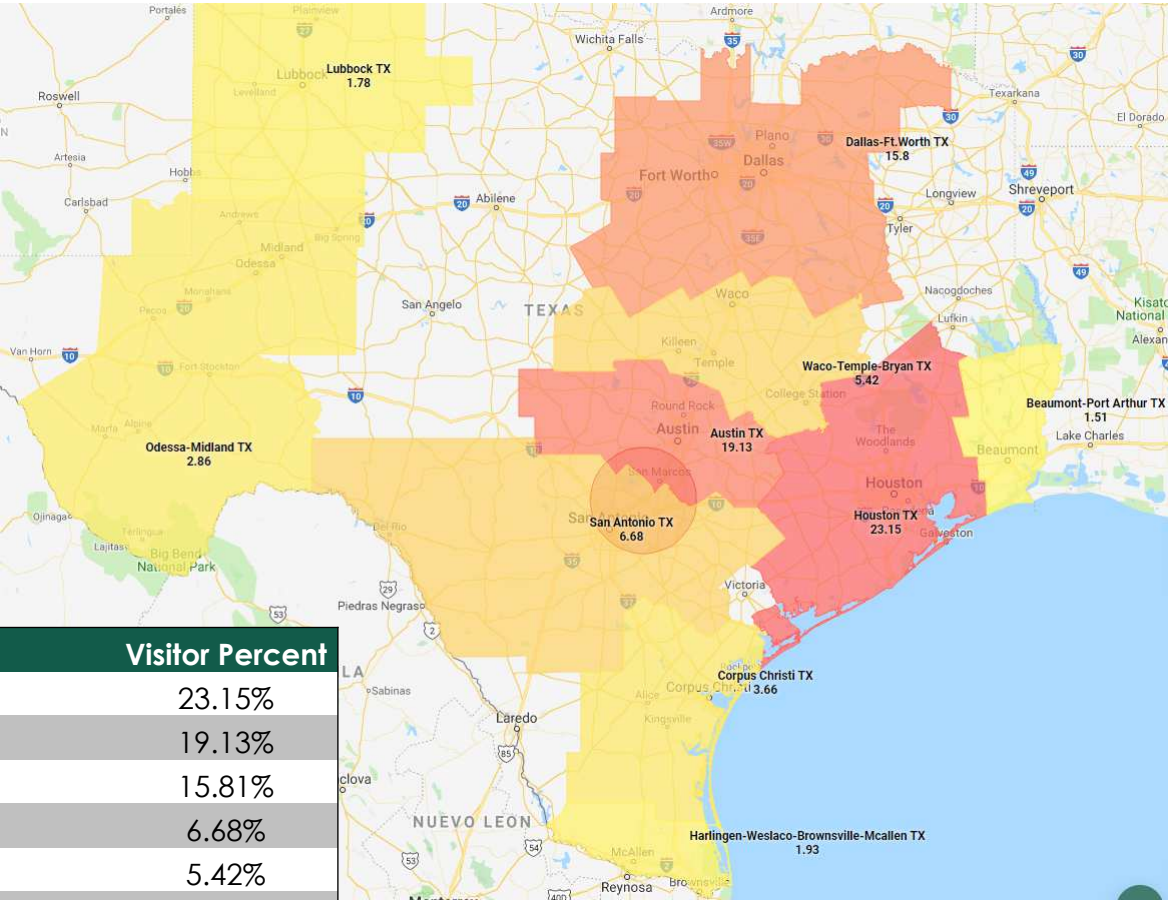
DMA	Visitor Percent
Houston TX	23.15%
Austin TX	19.13%
Dallas-Ft.Worth TX	15.81%
San Antonio TX	6.68%
Waco-Temple-Bryan TX	5.42%
Corpus Christi TX	3.66%
Odessa-Midland TX	2.86%
Harlingen-Weslaco-Brownsville-Mcallen TX	1.93%
Lubbock TX	1.78%
Beaumont-Port Arthur TX	1.51%

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WESTPOINTE VILLAGE
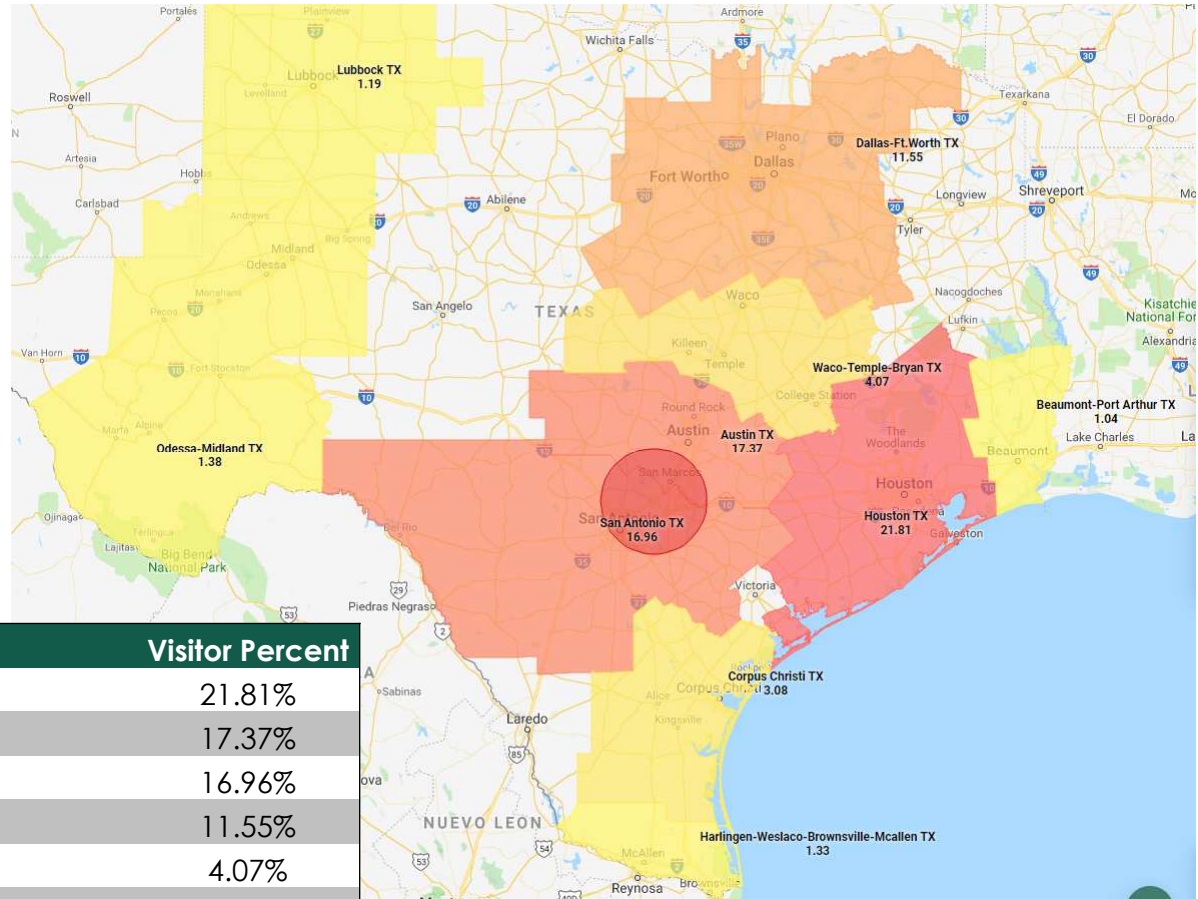
DMA	Visitor Percent
Houston TX	21.81%
Austin TX	17.37%
San Antonio TX	16.96%
Dallas-Ft.Worth TX	11.55%
Waco-Temple-Bryan TX	4.07%
Corpus Christi TX	3.08%
Odessa-Midland TX	1.38%
Harlingen-Weslaco-Brownsville-Mcallen TX	1.33%
Lubbock TX	1.19%
Beaumont-Port Arthur TX	1.04%

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RECOMMENDED NEXT STEPS

- **Share visitor profiles and origins** with existing businesses and partners to illustrate the consumer presence

- **Prioritize marketing budget** to the most likely look-a-like visitors in the top markets to drive future visitor traffic

- **Leverage the online [Segmentation Guide](#)** from Scout, this allows you to uncover additional insights for your top New Braunfels visitors

- **Leverage [actual rooftop customer origins](#)** (slightly adjusted for privacy) in Scout, this allows you to uncover, where your consumers come from

- **Leverage the [household analysis tool](#) in Scout**, this allows you to uncover the types of consumers/segments within an area

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APPENDIX

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VISITOR SEGMENTS: GROUP A

Segment A01: American Royalty – Wealthy, influential, and successful couples and families living in prestigious suburbs

Segment A02: Platinum Prosperity – Wealthy and established empty-nesting couples residing in suburban and in-town homes

Segment A03: Kids and Cabernet – Prosperous, middle-aged married couples with children living child-focused lives in affluent suburbs

Segment A04: Picture Perfect Families – Established families of child-rearing households living in wealthy suburbs

Power Elite

Segment A05: Couples with Clout – Middle-aged, childless couples living in affluent metro areas

Segment A06: Jet Set Urbanites – Mix of affluent singles and couples living high-rise, fashionable lives in urban neighborhoods

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VISITOR SEGMENTS: GROUP B

Segment B07: Generational Soup – Affluent couples and multi-generational families living a wide range of lifestyles in suburbia

Segment B08: Babies and Bliss – Middle-aged couples with large families and active lives in affluent suburbia

Segment B09: Family Fun-tastic – Upscale, middle-aged families with older children pursuing busy kid-centered lives in satellite cities

Segment B10: Cosmopolitan Achievers – Affluent middle-aged and established couples and families enjoying dynamic lifestyles in metro areas

Flourishing Families

Bu**x**ton

VISITOR SEGMENTS: GROUP C

Segment C11: Aging of Aquarius – Upscale boomer-aged couples living in city and close-in suburbs

Segment C12: Golf Carts and Gourmets – Upscale retirees and empty-nesters in comfortable communities

Segment C13: Silver Sophisticates – Mature, upscale couples and singles in suburban homes

Segment C14: Boomers and Boomerangs – Baby boomer adults and their teenage/young adult children sharing suburban homes

Booming with Confidence

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VISITOR SEGMENTS: GROUP D

Segment D15: Sports Utility Families – Upscale, middle-aged couples with school-aged children living active family lifestyles in outlying suburbs

Segment D16: Settled in Suburbia – Upper middle-class diverse family unites and empty nesters living in established suburbs

Segment D17: Cul De Sac Diversity – Ethnically-diverse, middle-aged families settled in new suburban neighborhoods

Segment D18: Suburban Attainment – Upper middle-class couples and families living in the expanding suburbs

Suburban Style

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VISITOR SEGMENTS: GROUP E

Segment E19: Full Pockets, Empty Nests – Empty-nesting, upper middle-class households with discretionary income living sophisticated lifestyles

Segment E20: No Place Like Home – Upper middle-class multi-generational households in exurban areas

Segment E21: Unspoiled Splendor – Comfortably established baby boomer couples in town and country communities

Thriving Boomers

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VISITOR SEGMENTS: GROUP F

Segment F22: Fast Track Couples – Active, young, upper middle-class suburban couples and families living upwardly-mobile lifestyles

Segment F23: Families Matter Most – Young, middle-class families in scenic suburbs leading active, family-focused lives

Promising Families

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VISITOR SEGMENTS: GROUP G

Segment G24: Status Seeking Singles – Younger, upwardly-mobile singles living in mid-scale metro areas leading leisure-intensive lifestyles

Segment G25: Urban Edge – Younger, up-and-coming singles living big city lifestyles located within top CBSA markets

Young, City Solos

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VISITOR SEGMENTS: GROUP H

Segment H26: Progressive Potpourri – Mature, multi-ethnic couples with comfortable and active lives in middle-class suburbs

Segment H27: Birkenstocks and Beemers – Upper middle-class, established couples living leisure lifestyles in small towns and cities

Segment H28: Everyday Moderates – Mid-scale, multi-cultural couples and families living in mid-tier metro suburban settings

Segment H29: Destination Recreation – Middle-aged, midscale couples in rural towns and fringe suburbs working to enjoy their active lifestyles

Middle-Class Melting Pot

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VISITOR SEGMENTS: GROUP I

Segment I30: Stockcars and State Parks – Middle-class couples and families living in more remote rural communities

Segment I31: Blue Collar Comfort – Middle-class families in smaller cities and towns with solid blue-collar jobs

Segment I32: Steadfast Conventionalists – Conventional Generation X families located in selected coastal city homes

Segment I33: Balance and Harmony – Middle-class families living lively lifestyles in city-centric neighborhoods

Family Union

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VISITOR SEGMENTS: GROUP J

Segment J34: Aging in Place – Middle-class seniors living solid, suburban lifestyles

Segment J35: Rural Escape – Older, middle-class couples and singles living comfortable lives in rural towns

Segment J36: Settled and Sensible – Older, middle-class and empty-nesting couples and singles in city neighborhoods

Autumn Years

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VISITOR SEGMENTS: GROUP K

Segment K37: Wired for Success – Young, mid-scale singles and couples living socially-active city lives

Segment K38: Gotham Blend – Mix of middle-aged and middle-class singles and couples living urban New York City-area lifestyles

Segment K39: Metro Fusion – Ethnically-diverse, middle-aged singles living urban active lifestyles

Segment K40: Bohemian Groove – Older divorced and widowed individuals enjoying settled urban lives

Significant Singles

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VISITOR SEGMENTS: GROUP L

Segment L41: Booming and Consuming – Older empty-nesting couples and singles enjoying relaxed lives in small towns

Segment L42: Rooted Flower Power – Mid-scale baby boomer singles and couples rooted in established suburban communities and approaching retirement

Segment L43: Homemade Happiness – Lower middle-class baby boomer households living in remote town and country homes

Blue Sky Boomers

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VISITOR SEGMENTS: GROUP M

Segment M44: Red, White, and Bluegrass – Lower middle-income rural families with diverse adult and children household dynamics

Segment M45: Diapers and Debit Cards – Young, working-class families and single parent households living in small established, city residences

Families in Motion

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VISITOR SEGMENTS: GROUP N

Segment N46: True Grit Americans – Older, middle-class households in town and country communities located in the nation's midsection

Segment N47: Countrified Pragmatics – Lower middle-income couples and singles living rural, casual lives

Segment N48: Rural Southern Bliss – Lower middle-income multi-generational families living in small towns

Segment N49: Touch of Tradition – Working-class, middle-aged couples and singles living in rural homes

Pastoral Pride

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VISITOR SEGMENTS: GROUP O

Segment O50: Full Steam Ahead – Younger and middle-aged singles gravitating to second-tier cities

Segment O51: Digital Dependents – Mix of Generation Y and X singles who live digital-driven, urban lifestyles

Segment O52: Urban Ambition – Mainly Generation Y African-American singles and single families established in mid-market cities

Segment O53: Colleges and Cafes – Young singles and recent college graduates living in college communities

Singles and Starters

Segment O54: Striving Single Scene – Young, multi-ethnic singles living in Midwest and Southern city centers

Segment O55: Family Troopers – Families and single-parent households living near military bases

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VISITOR SEGMENTS: GROUP P

Segment P56: Mid-scale Medley – Middle-aged, mid-scale unattached adults living in secondary cities

Segment P57: Modest Metro Means – Mid-scale singles established in inner-city communities

Segment P58: Heritage Heights – Singles and families with mid and low incomes living settled lives in urban apartments

Segment P59: Expanding Horizons – Middle-aged, mid-scale income families living mainly within US border cities

Cultural Connections

Segment P60: Striving Forward – Mid-scale families and single parents in gateway communities

Segment P61: Humble Beginnings – Multi-cultural singles and single-parent households with mid-scale incomes in city apartments

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VISITOR SEGMENTS: GROUP Q

Segment Q62: Reaping Rewards – Relaxed, retired couples and widowed individuals in suburban homes living quiet lives

Segment Q63: Footloose and Family Free – Elderly couples and widowed individuals living active and comfortable lifestyles

Segment Q64: Town Elders – Stable, minimalist seniors living in older residences and leading sedentary lifestyles

Segment Q65: Senior Discounts – Downscale, settled retirees in metro apartment communities

Golden Year Guardians

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VISITOR SEGMENTS: GROUP R

Segment R66: Dare to Dream – Young singles, couples, and single parents with lower incomes starting out in city apartments

Segment R67: Hope for Tomorrow – Young, lower-income single parents in second-city apartments

Aspirational Fusion

Bu⋅ton

VISITOR SEGMENTS: GROUP S

Segment S68: Small Town Shallow Pockets – Older, down-scale singles and empty-nesters living in modest ex-urban small towns

Segment S69: Urban Survivors – Older, lower income singles and single parents established in modest urban neighborhoods

Segment S70: Tight Money – Middle-aged, lower income unattached individuals in transitional small town and ex-urban apartments

Segment S71: Tough Times – Older, down-scale and ethnically-diverse singles typically concentrated in inner-city apartments

Economic Challenges

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