

The Impact of Tourism in Comal County

**City of New Braunfels and the
New Braunfels Economic Development Foundation**



PRESENTED BY



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Summary

TXP was engaged to provide an economic impact assessment of tourism in Comal County, including a specific measurement of river tourism. In the course of this analysis, seven major findings emerged:

- Finding # 1:** *Overall growth has been explosive in New Braunfels and Comal County in recent years, with most aggregate indicators suggesting a pace of expansion among Texas' fastest.*
- Finding # 2:** *Tourism has grown at a slower pace than the balance of the local economy in recent years, partially due to the impact of 9-11 and unusual weather patterns. Loss of some local shopping outlets also has had an impact, as has the rapid growth of retail along I-35 outside Comal County (a situation at least partially being addressed).*
- Finding # 3:** *The impact of \$224.9 million in direct travel and tourism spending during 2006 translates into a total economic impact of \$273.1 million in output, \$160.6 million in value-added, \$64.1 million in earnings, and approximately 2,750 jobs. Direct spending due to river tourism during 2006 was \$22.5 million; total output was \$34.3 million, value-added was \$19.2 million, earnings were \$8.3 million, and total employment was 387.*
- Finding # 4:** *Tourism contributes just under \$5 million to the City of New Braunfels and Comal County, with lodging and sales taxes roughly equal. River tourism accounts for about 20 percent of the total.*
- Finding # 5:** *The economic impact of travel and tourism, as with many industries that promote the area, extends beyond the calculations.*
- Finding # 6:** *Water is at the core of New Braunfels "brand."*
- Finding # 7:** *The current tourism infrastructure is both under-utilized and under-leveraged.*

The report offers the following conclusion:

The measurable value of travel and tourism to Comal County/New Braunfels is clear. Economic activity attributable to the "importing" of dollars into the community due to non-Comal residents spending supports thousands of jobs and provides millions of dollars in local earnings each year. The City and County also benefit, as tax revenues attributable to the impact of travel and tourism approach \$5 million annually.

That having been said, the non-measurable impacts may be just as great. Much energy and effort in the recent past has gone into analyzing the emerging role of "quality of life" considerations in economic development, with a growing sense that recreational and other tourism amenities have an increasing role in the recruitment and retention of individuals and firms in the community. This can create synergy, as continued investment in creating the shopping, cultural, and recreational amenities that appeal to tourists can also serve to benefit those who live and work in Comal county, present and future. In essence, the sum is greater than the parts, suggesting that policies and spending decisions that influence this sector be seen in a broad context.

Introduction

2007 has been a challenging year for seasonal tourism in New Braunfels and Comal County. A number of factors (not the least of which was unusual weather patterns) appears of have reduced the number of visitors in general, and tubers in particular. This downturn has come against a background of much discussion (and some litigation) related to the relative role and extent of tourism in the local economy, with matters coming to a head over the impact of the rivers and how best to manage and regulate river activity. As a means of informing the process, TXP was engaged to provide an economic impact assessment of tourism in Comal County, including a specific measurement of river tourism. As part of that process, TXP met with various local stakeholders a number of times, reviewed the academic and trade literature around the local economic impacts of tourism (including estimates produced for the State of Texas), conducted a survey of the origin and spending patterns of river tourists, and calibrated our model of Comal county in light of the most recently available data.

The structure of the report is as follows. Section One reviews overall trends in the New Braunfels economy, including an emphasis on indicators of the travel and tourism sector. Section Two provides findings from a survey TXP conducted over the course of the summer with river tubers regarding their place of origin, length of stay, and expenditure patterns. Section Three uses information from Sections One and Two, in part, to estimate the overall economic and tax impact of travel and tourism in Comal County, with river tourism treated separately. Section Four concludes the report, and summarizes the major findings.

1. The Economic Context

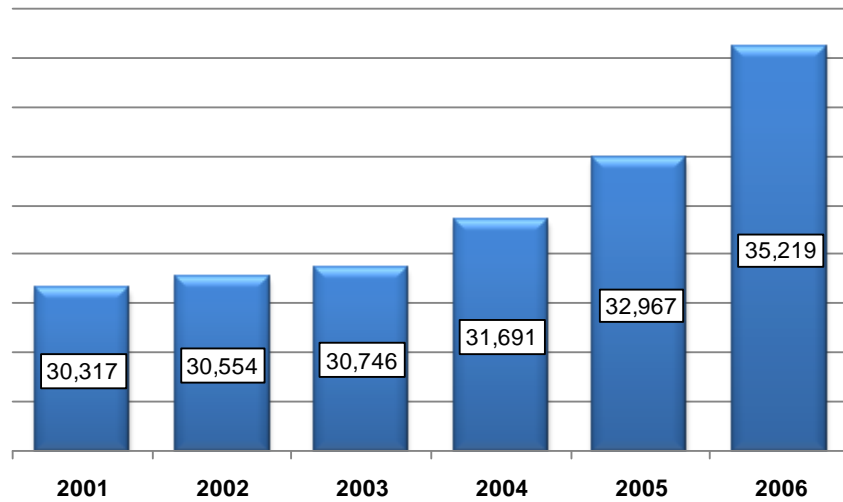
Comal County Economy

Finding #1: *Overall growth has been explosive in New Braunfels and Comal County in recent years, with most aggregate indicators (population, jobs, consumer spending, housing development) suggesting a pace of expansion that is among the fastest in Texas.*

Strategically located on the I-35 Corridor in one of the hottest regions in the nation, it is not surprising that growth in New Braunfels and Comal County has been rapid in recent years, especially when local amenities and quality of life are factored into the equation. Since the beginning of the decade, approximately 20,000 new residents have moved to the community, pushing total Comal County population past 100,000. Over that same period, over 5,000 new jobs have been created in county, while other indicators of development have more than kept pace. The gap between the level of community-based employment and the surge in population is explained by the fact that a significant share of Comal County residents continue to commute outside the county for work. For example, there were just over 35,000 jobs in the county during 2006, but,

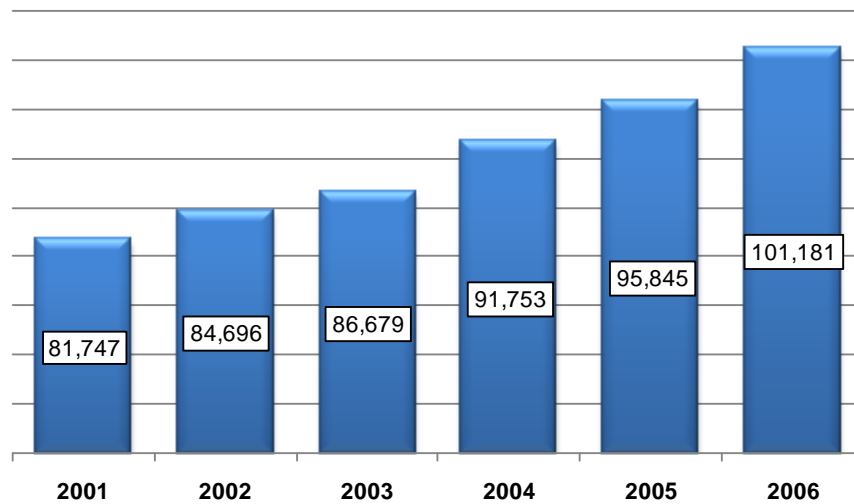
that same year, more than 48,000 Comal residents reported being employed. Also of note is the sharp rise in sales tax collections, a trend driven by both increased consumer spending and taxable sales of building materials.

Figure 1 – Total Comal County Employment



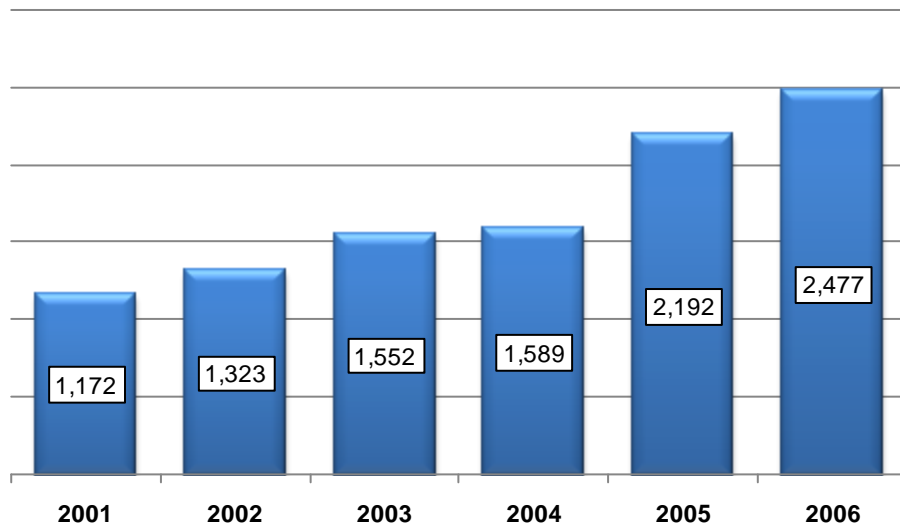
Source: TXP, Texas Workforce Commission

Figure 2 – Comal County Population



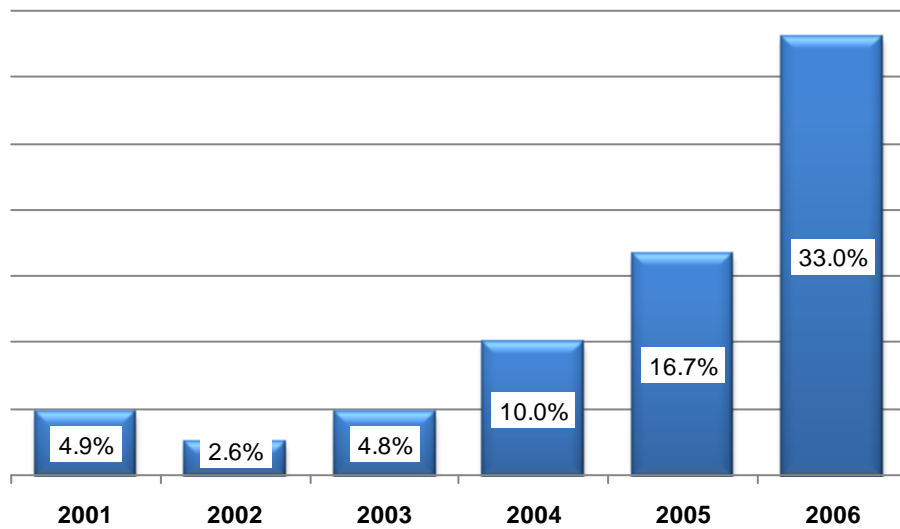
Source: TXP, U.S. Census Bureau

Figure 3 – Comal County Single-Family Building Permits



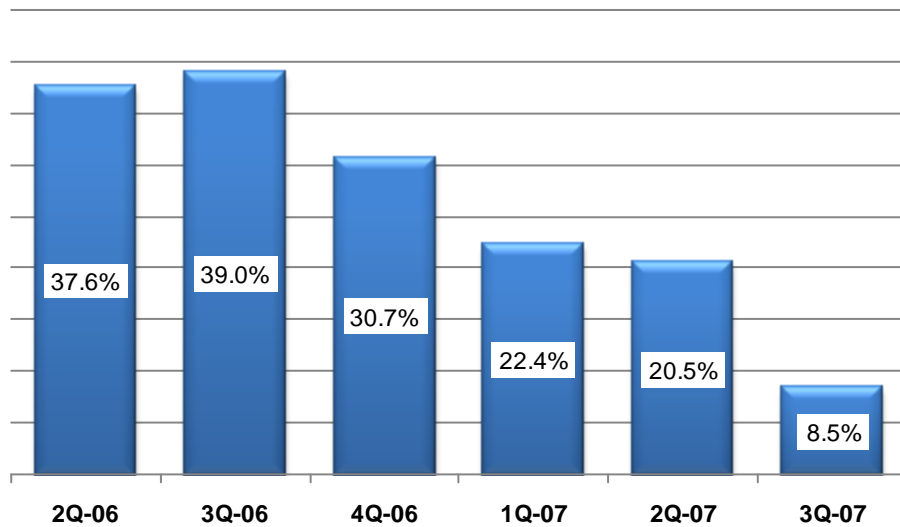
Source: TXP, U.S. Census Bureau

Figure 4 – Growth in Comal County Sales Tax



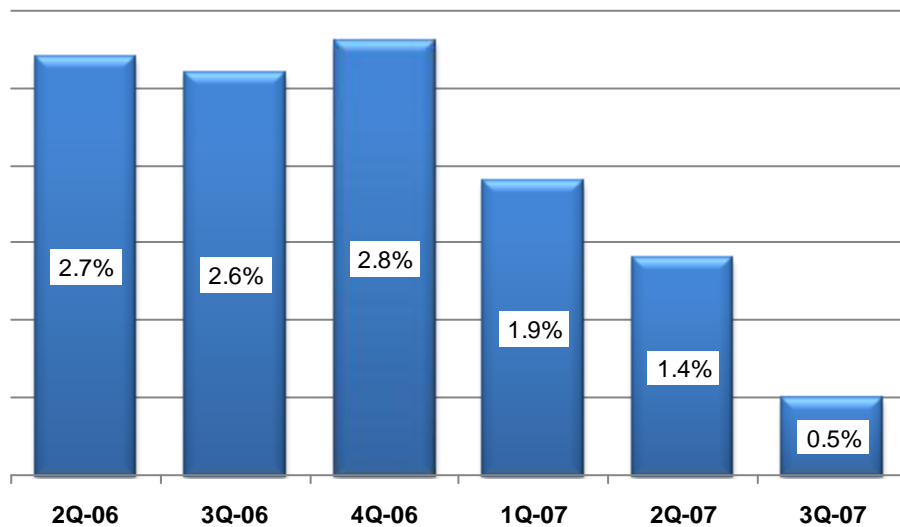
Source: TXP, Texas Comptroller's Office

Figure 5 – Recent Annual Growth in Comal County Sales Tax



Source: TXP, Texas Comptroller's Office

Figure 6 – Recent Annual Growth in Comal County Employment (Household Series)



Source: TXP, Bureau of Labor Statistics

Comal County Travel & Tourism

Finding #2: *Tourism has grown at a slower pace than the balance of the local economy in recent years, partially due to the impact of 9-11 and unusual weather patterns. Loss of some local shopping outlets also has had an impact, as has the rapid growth of retail along I-35 outside Comal County (a situation at least partially being addressed).*

Travel and tourism has been a key element of New Braunfels economy for much of the recent past. From the Handbook of Texas Online section on Comal County:

The emergence of tourism as a primary industry, as well as attendant increases in retail and service employment, explains much of the population growth. . . Since its impoundment in 1964, Canyon Lake has transformed a rural stretch of the Guadalupe River valley in northern Comal County into one of the largest rural population centers in Central Texas. . . Canyon Lake and the scenic river valley below the dam have also served as the focal point for revitalization of a tourist industry in the county that dates to the early years of the century, when the International-Great Northern Railroad promoted New Braunfels as a tourist destination for San Antonians. Capitalizing on the natural and historic attractions offered by the Guadalupe River, by Natural Bridge Caverns, and by the county's German heritage, tourism in the mid-1980s supported some thirty hotels and motels, as well as resort condominiums, around New Braunfels and Canyon Lake.

Table 1 - Comal County Hotel Performance

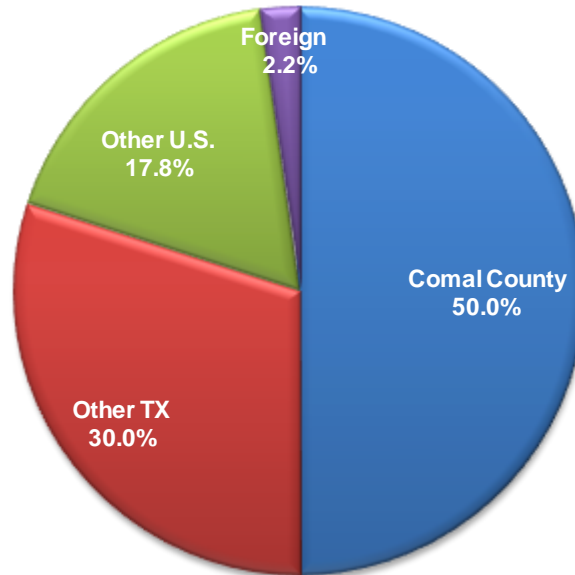
	Room Nights Available (000s)	Room Nights Sold (000s)	Occupancy (Percentage)	Revenue (Millions)
1998	555.8	277.3	49.9%	\$20.0
1999	586.3	279.1	49.6%	\$21.3
2000	610.7	315.7	51.7%	\$23.6
2001	615.0	314.3	51.1%	\$24.8
2002	627.0	290.3	46.3%	\$23.2
2003	669.7	326.8	48.8%	\$27.2
2004	696.4	324.5	46.6%	\$27.4
2005	727.3	353.5	48.6%	\$31.9
2006	715.1	353.3	49.4%	\$34.1

Source: TXP, Office of the Governor, State of Texas

Recent trends indicated that the local tourism industry has been fairly stable, as the industry rebounded from the impact of 9-11 and several summers of less than ideal weather. Hotel performance reflects the seasonal nature of much of the local tourism sector, with much higher occupancy rates during the spring and summer. A combination of inflation and expanded capacity has pushed overall hotel revenue up every year since 1998, with a cumulative gain of just over seventy percent over that

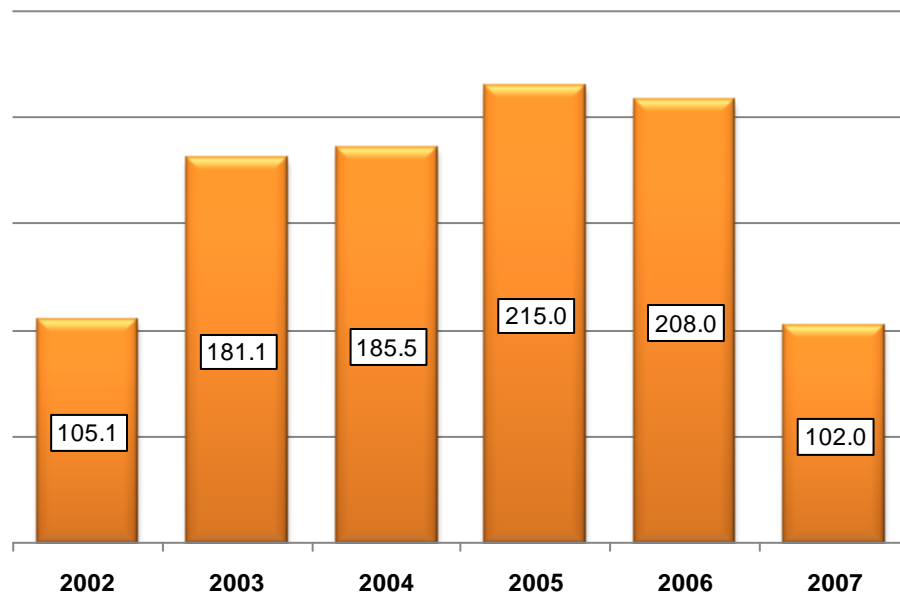
period. Employment in Accommodation and Arts, Entertainment, & Recreation (the two segments most closely aligned with tourism) has also grown in the recent years, though growth has been slower and more volatile than elsewhere in the local economy.

Figure 7 – Origin of Comal Museum Visitors: 2004-2006



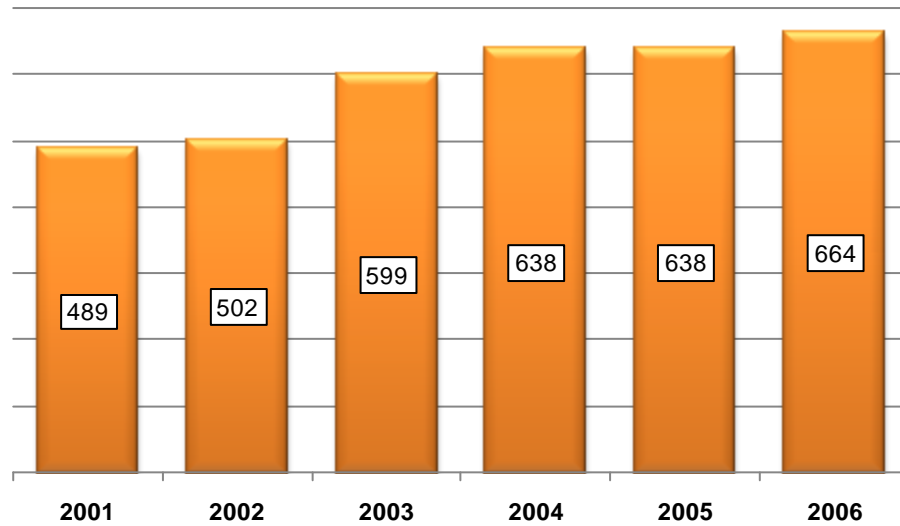
Source: TXP, Local Sources

Figure 8 – Number of Tubers (000s)



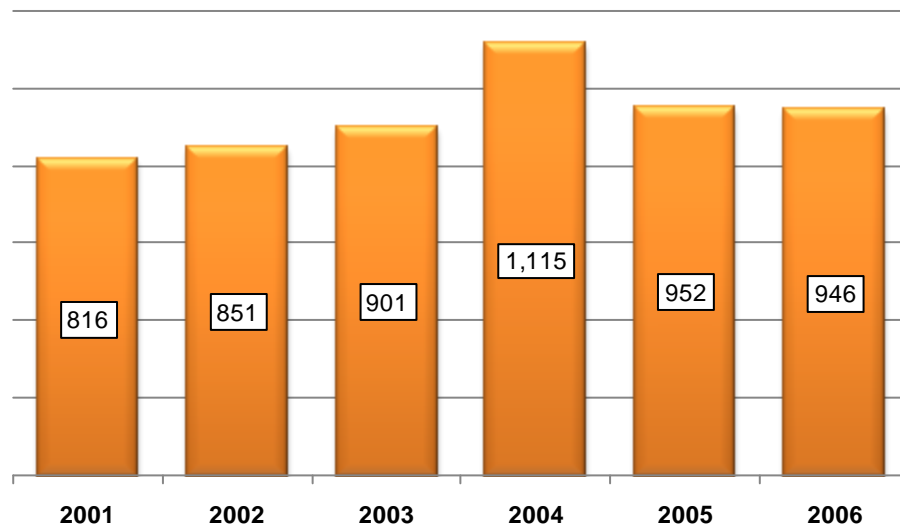
Source: TXP, City of New Braunfels. Note: the estimates of the number of tubers are based on reported collections of the river management fee.

Figure 9 – Comal County Accommodation Employment



Source: TXP, Texas Workforce Commission

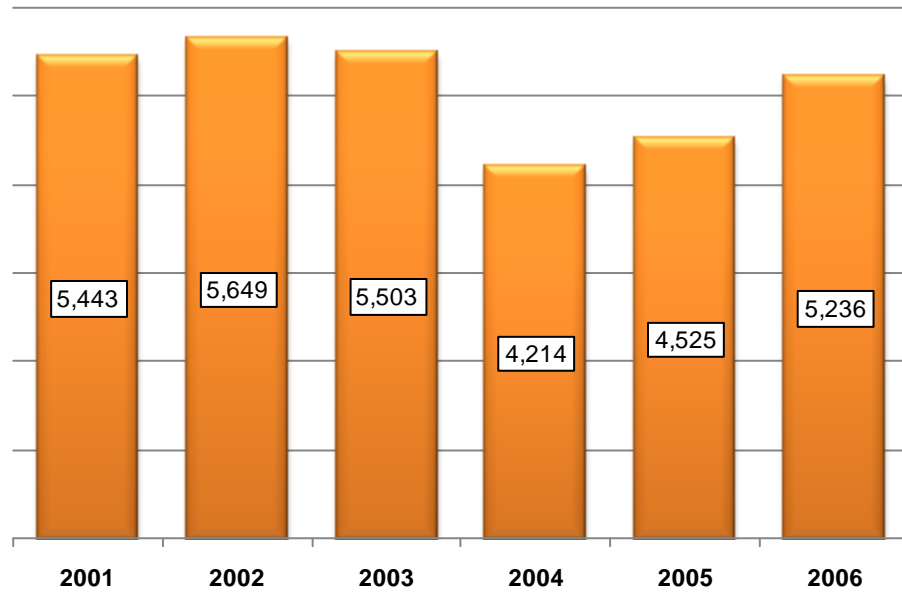
Figure 10 – Comal County Arts, Entertainment, & Recreation Employment



Source: TXP, Texas Workforce Commission

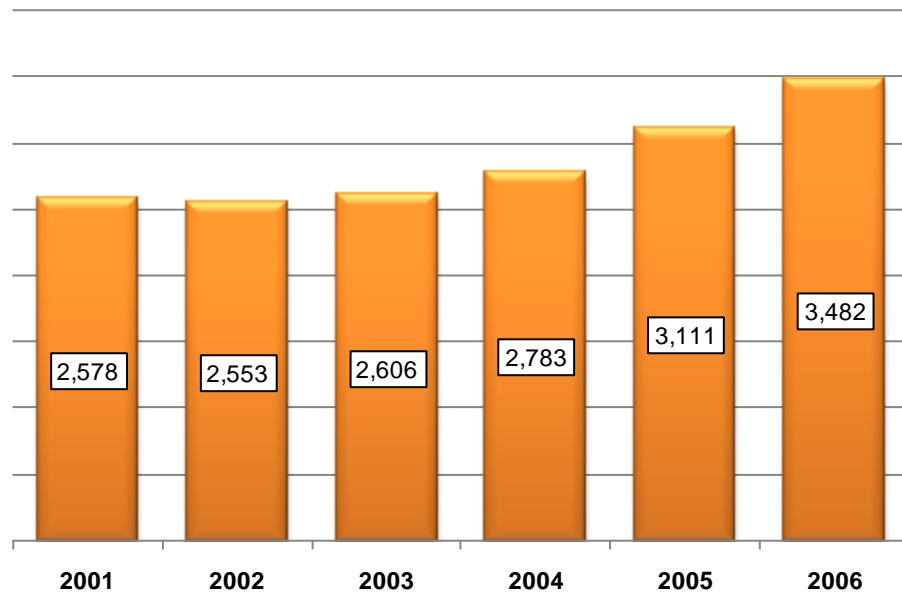
Broader employment measures of consumer activity in Comal County suggest something of a mixed bag. Aggregate retail trade employment dipped sharply during 2004, but has rebounded strongly in the last several years, and can be expected to grow commensurate with new shopping outlets that are in the offing. Restaurants have grown steadily, but general merchandise stores have taken a hit, likely reflecting the closure of one or more large outlets.

Figure 11 – Comal County Retail Trade Employment



Source: TXP, Texas Workforce Commission

Figure 12 – Comal County Eating & Drinking Employment



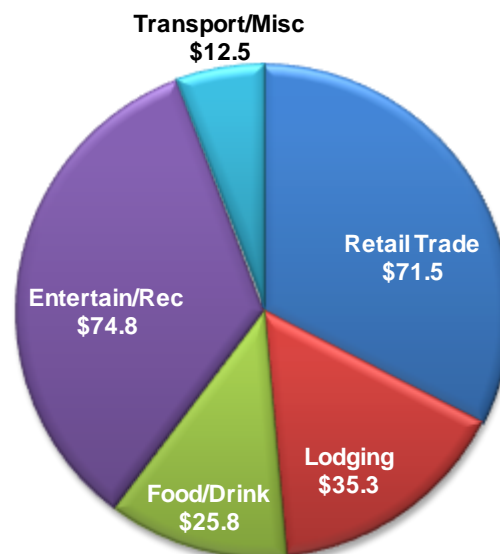
Source: TXP, Texas Workforce Commission

2. The Direct Impact of Travel & Tourism in Comal County

Overall Travel & Tourism

In order to capture the broadest range of possible travel and tourism activity, a “top-down” approach to measuring the direct impact was used. Since “tourism” is not a discreet industry classification, the Bureau of Economic Analysis of U.S. Department of Commerce maintains satellite accounts of the relative impact of tourism activity on the national economy, including the proportion of a given industry that can be ascribed to tourist demand, i.e.; approximately 20 percent of all restaurant/bar sales are to customers who reside outside the local area. These ratios were used as a starting point, and were then modified using location quotients for Comal County vs. Texas to adjust for unusual concentrations in the local market. For example, the incidence of activity in Amusement and Recreation Services (using data from the 2002 Economic Census) was much higher as a proportion of total activity in Comal County than statewide, likely reflecting the presence of attractions such as Schlitterbahn. Once the adjustments were made, total direct Comal County tourism activity for 2002 was estimated at \$143.6 million. This figure was inflated to 2006 using a combination of growth in estimated gross sales by specific industry from the Comptroller’s Office, hotel revenue data, and changes in employment. The result was an estimate of direct 2006 Comal County tourism spending of \$224.9 million. Figure 13 provides more detail.

Figure 13 – Direct 2006 Comal County Travel & Tourism Spending (millions)



River Tourism

Separating out the impacts of river tourism (defined here as tourist activity based on tubing on the Comal and/or Guadalupe rivers as the primary purpose for visiting New Braunfels/Comal County) required primary research. Survey data was collected at the point of either entry or departure from the rivers on several occasions over the course of summer 2007, with care taken to balance location and day of the week in order to reflect actual activity as closely as possible. A total of 1,046 responses were collected, of which 52 indicated that they resided in Comal County and a further 48 indicated that tubing/river activity was not the primary purpose of their visit to the area. Of the remaining 946 the split between day-trippers and those who spend at least one night in the area was almost even, with 46.5 percent coming for the day and the balance spending at least one night. Average daily spending for day-trippers was fairly modest, at just under \$27, while those who spent at least one night spent an average of \$187.64.

The City of New Braunfels reported just over 208,000 tubers had paid the tube fee during 2006, which presumably was collected when tubes were rented through one of the local outfitters. Reducing that figure by five percent (the share of tubers who reside in Comal County) puts the number of 2006 out-of-town tubers at 197,630, a figure further reduced by five percent to account for those who have come to town for some main purpose other than river activities. However, there are some tubers who do not rent tubes from local outfitters. Based on direct observation, their inclusion would just about offset the locals who rent, putting the 2006 estimate of out-of-town tubers at 199,122. With a blended average per tuber spend of almost \$113, the total 2006 direct river tourism impact was \$22.5 million.

Figure 14 – Length of Stay of Overnight River Visitors

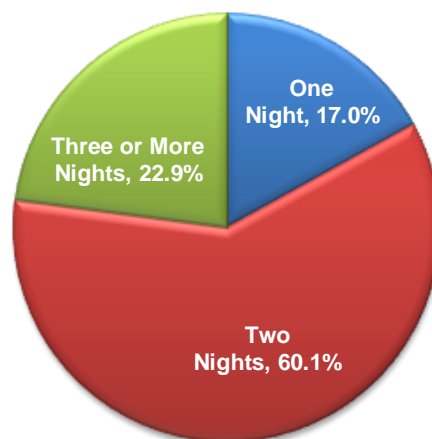


Figure 15 – Origin of Daytrip River Visitors

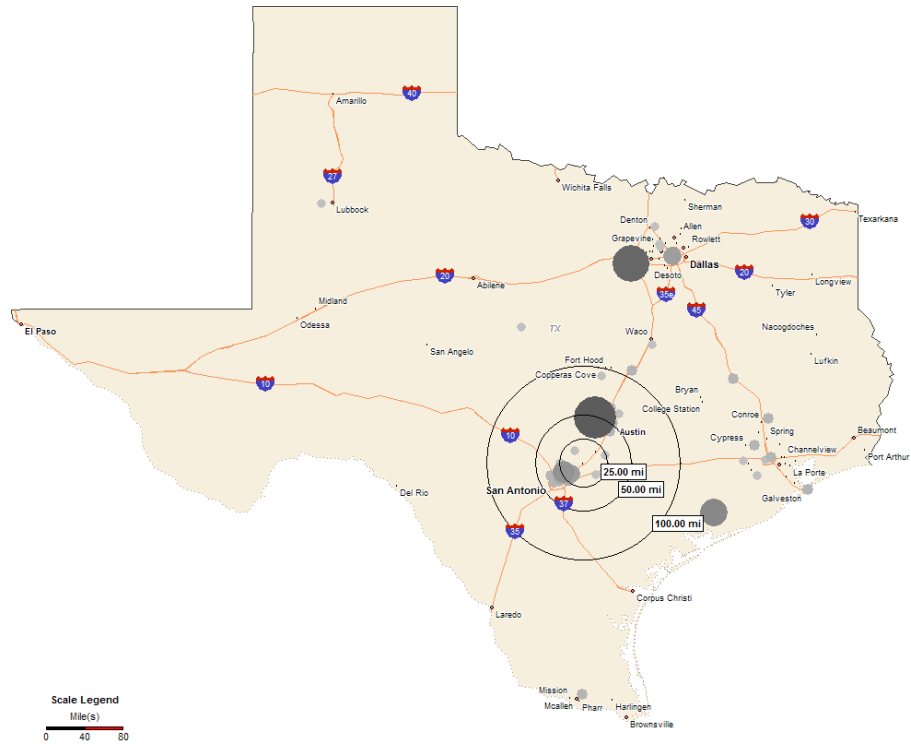


Figure 16 – Origin of Overnight River Visitors

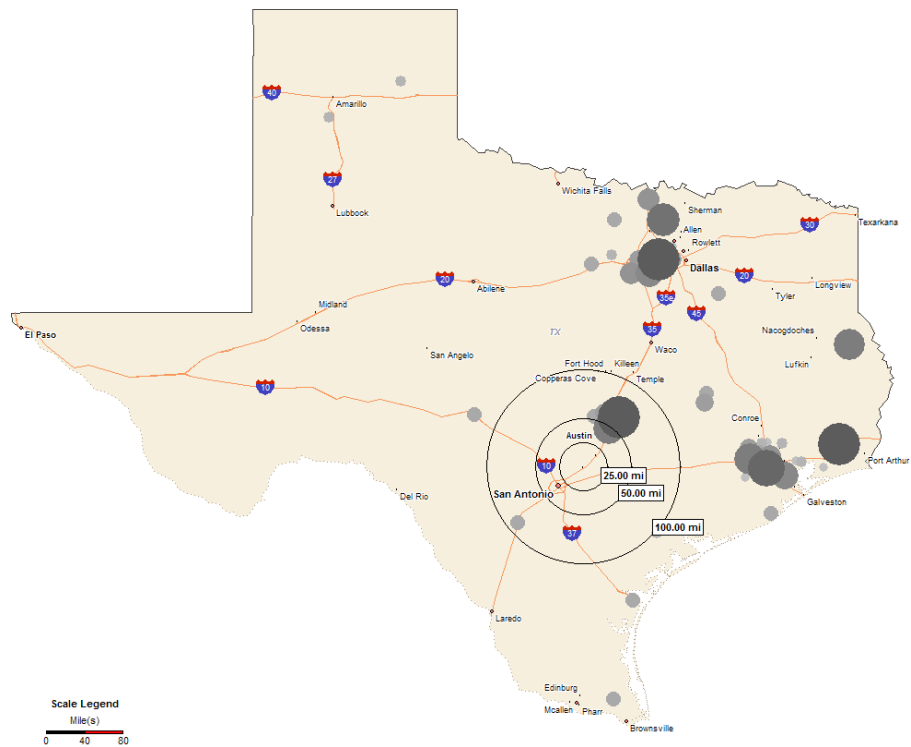
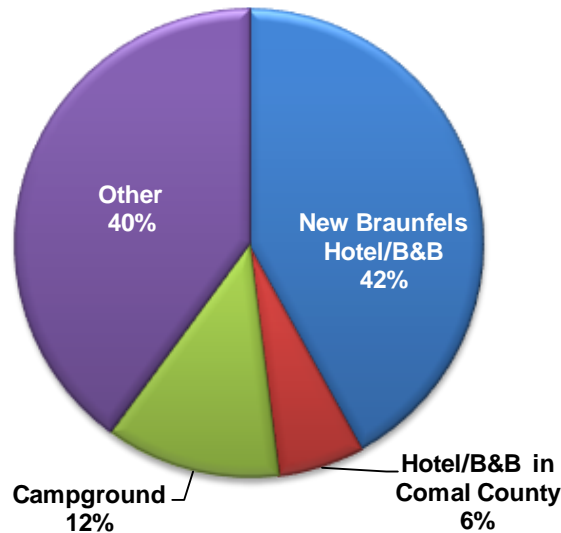


Figure 17 – Choice of Accommodation of Overnight River Visitors



3. The Total Economic & Tax Revenue Impacts of Travel & Tourism in Comal County

Economic Impact Methodology

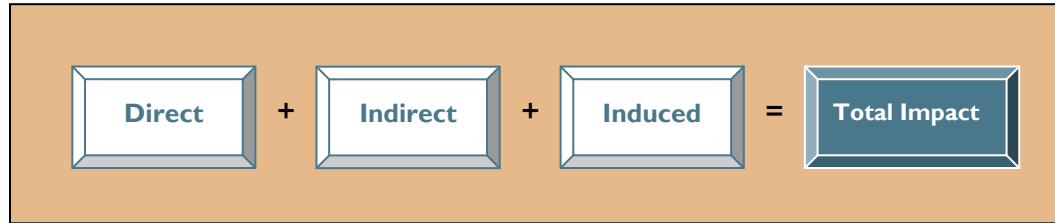
The economic impacts extend beyond the direct activity outlined above. In an input-output analysis of new economic activity, it is useful to distinguish three types of expenditure effects: direct, indirect, and induced. Direct effects are production changes associated with the immediate effects or final demand changes. The payment made by an out-of-town visitor to a hotel operator is an example of a direct effect, as would be the taxi fare that visitor paid to be transported into town from the airport.

Indirect effects are production changes in backward-linked industries caused by the changing input needs of directly affected industries – typically, additional purchases to produce additional output. Satisfying the demand for an overnight stay will require the hotel operator to purchase additional cleaning supplies and services, for example, and the taxi driver will have to replace the gasoline consumed during the trip from the airport. These downstream purchases affect the economic status of other local merchants and workers.

Induced effects are the changes in regional household spending patterns caused by changes in household income generated from the direct and indirect effects. Both the hotel operator and taxi driver experience increased income from the visitor's stay, for

example, as do the cleaning supplies outlet and the gas station proprietor. Induced effects capture the way in which this increased income is in turn spent by them in the local economy.

Figure 18 - The Flow of Economic Impacts



Once the ripple effects have been calculated, the results can be expressed in a number of ways. Four of the most common are “Output,” equivalent to sales; “Value-Added,” which describes the difference between a firm’s top-line revenue and its cost of goods sold (exclusive of labor-related costs); “Earnings,” which represents the compensation to employees and proprietors; and “Employment,” which refers to permanent, full-time jobs that have been created in the local economy. The interdependence between different sectors of the economy is reflected in the concept of a “multiplier.” An output multiplier, for example, divides the total (direct, indirect and induced) effects of an initial spending injection by the value of that injection – i.e., the direct effect. The higher the multiplier, the greater the interdependence among different sectors of the economy. An output multiplier of 1.4, for example, means that for every \$1,000 injected into the economy, another \$400 in output is produced in all sectors.

Economic Impact

***Finding #3:** The impact of \$224.9 million in direct travel and tourism spending translates into a total economic impact of \$273.1 million worth of output, \$160.6 million in value-added, \$64.1 million in earnings, and approximately 2,750 jobs. Direct spending due to river tourism during 2006 was \$22.5 million; total output was \$34.3 million, value-added was \$19.2 million, earnings were \$8.3 million, and total employment was 387.*

Table 2 - Total Economic Impact of Comal County Travel & Tourism (2006)

	Output	Value-Added	Earnings	Jobs
Total Travel & Tourism	\$273,129,518	\$160,644,428	\$64,087,461	2,773
- River Tourism	\$34,303,638	\$19,188,777	\$8,301,889	387
- Other Tourism	\$238,825,880	\$141,455,651	\$55,785,572	2,386

Source: TXP

Tax Revenue Impacts

There are two areas of tax impact associated with travel and tourism in Comal County: A) revenue linked to new spending in clearly defined categories that have a defined tax rate such as lodging and B) revenue generated as a result of overall increased economic activity in the region. For example, restaurants buy goods and services from local suppliers to meet the increased demand created by out-of-town visitors. In addition, the restaurant and its suppliers employ local workers who spend their income within the region. This economic activity, called the ripple effect, generates tax revenue for local jurisdictions. In conceptual equation form, this translates as follows:

$$A \text{ (taxes associated with direct new activity)} + B \text{ (additional tax revenue based on ripple effects)} = C \text{ (total tax revenue)}$$

The approach for calculating A is relatively straightforward for some taxes – multiply total new spending in each category by the existing tax rates. The approach used to estimate the ripple tax impacts of the project was to examine the relationship between personal income and City and County tax revenue derived from local sources. Note: these findings do not include property taxes or fees.

Finding #4: *Tourism contributes just under \$5 million to the City of New Braunfels and Comal County, with lodging and sales taxes roughly equal. River tourism accounts for about 20 percent of the total.*

Table 3 – Local Tax Revenue Impact of Comal County Tourism (2006)

	Lodging Taxes	Sales Taxes	Total
Total Travel & Tourism	\$2,469,848	\$2,472,728	\$4,942,575
- River Tourism	\$630,270	\$230,435	\$860,704
- Other Tourism	\$1,839,578	\$2,242,293	\$4,081,871

Source: TXP Note: Does not include any fee revenue

Additional Findings

Finding # 5 *The economic impact of travel and tourism, as with many industries that promote the area, extends beyond the calculations.*

There is no doubt that travel and tourism make a very positive contribution to the New Braunfels area economy, as the total impact extends into the millions of dollars annually, while supporting thousands of jobs. That having been said, the non-measurable impacts may be just as great. Much energy and effort in the recent past has gone into analyzing the emerging role of “quality of life” considerations in economic development, with a growing sense that recreational and other tourism amenities have

an increasing role in the recruitment and retention of individuals and firms in the community. As a result, tourism is a thread in the overall community development fabric, and its unraveling could well have implications beyond the impact figures outlined in this report.

Finding # 6: *Water (with some German heritage thrown in) is at the core of New Braunfels “brand.”*

Tagged as the “number 1 water-park in America” by the Travel Channel, Schlitterbahn is perhaps the best-known of Comal county’s water assets, consistently ranking among the top twenty destinations in the state. However, New Braunfels rivers have been frequented by generations of Texans from the DFW/San Antonio/Houston triangle, as confirmed by the results of the survey. Water is top-of-mind (along with German heritage) for most when thinking of New Braunfels, so its not surprising that it is featured prominently on both the City’s and chamber’s websites.

Finding # 7: *The current tourism infrastructure is both under-utilized and under-leveraged.*

While there are significant tourism assets in Comal County, the industry’s impact has yet to reach its full potential. Part of the problem lies in the seasonality of the current tourism industry, as water-related activities are by definition largely in the warmer months of the year (areas that rely heavily on other seasonal uses, such as hunting, have similar issues).

Table 4 - Hotel Occupancy (2006)

	1Q-06	2Q-06	3Q-06	4Q-06	Annual
Comal County	40.2%	54.8%	64.0%	35.4%	49.4%
Bexar County	67.0%	66.3%	66.5%	58.3%	64.5%
Gillespie County	47.8%	59.4%	50.0%	49.5%	51.7%
Hays County	53.4%	62.2%	65.0%	53.4%	58.6%
Kerr County	42.0%	61.8%	53.7%	42.7%	50.0%
Texas	62.3%	62.5%	61.8%	57.2%	60.9%

Source: TX State Comptroller, TXP

Efforts are underway to increase “off-season” activity through investment in new infrastructure, as the Kongresshalle Convention Center is scheduled to open next spring with an 11,780-square-foot exhibit hall and a 9,298-square-foot ballroom. However, continued investment is needed, especially on the shopping and lodging front. This is especially true as more and more communities look to the travel and tourism industry as a plank in their economic development platform, suggesting that the competitive environment will remain heightened for the foreseeable future.

Table 5 - Shares of Total Employment (2006)

	Comal	Bexar	Hays	Gillespie	Kerr	Texas
Arts/Entertainment/Rec.	3.1%	1.5%	1.2%	1.3%	1.7%	1.3%
Traveler Accommodation	1.6%	2.0%	0.8%	2.3%	2.5%	1.1%
Eating & Drinking Places	11.4%	10.7%	14.5%	12.3%	9.8%	9.0%
Clothing Stores	0.6%	1.4%	6.7%	1.4%	1.3%	1.3%
General Merchandise Stores	2.5%	2.8%	2.7%	4.3%	3.6%	3.1%

Source: BLS, TXP

Conclusion

The tangible value of travel and tourism to Comal County and New Braunfels is clear. Economic activity attributable to the “importing” of external dollars into the community in the form of spending by non-Comal residents supports thousands of jobs and provides millions of dollars in earnings for local residents each year. The City and County also benefit, as tax revenues attributable to the impact of travel and tourism approach \$5 million annually.

That having been said, the non-measurable impacts may be just as great. Much energy and effort in the recent past has gone into analyzing the emerging role of “quality of life” considerations in economic development, with a growing sense that recreational and other tourism amenities have an increasing role in the recruitment and retention of individuals and firms in the community. This can create synergy, as continued investment in creating the shopping, cultural, and recreational amenities that appeal to tourists can also serve to benefit those who live and work in Comal county, present and future. In essence, the sum is greater than the parts, suggesting that policies and spending decisions that influence this sector be seen in a broad context.

Appendix 1: New Braunfels Attractions

Children's Museum

Children of all ages enjoy hands-on exhibits, which include CMN-TV studio, a puppet palace, and other creative areas. Admission fee.

Activity Details

Hours Open:	Mon - Sat 9 am - 5 pm; Sun noon - 5 pm
Address:	386 W. San Antonio
Zip Code:	78130
Telephone #:	830/620-0939

Clear Springs Aviaries & Zoological Garden

Visitors have a chance to walk through seven acres of a 35-acre park that is home to more than 200 species of exotic birds and animals. There is a two-acre lake, a duck pond, and more than 2,000 species of exotic plants. Self-guided tour through landscaped gardens. Exit 182 on I-35 South. Admission fee

Activity Details

Hours Open:	Daily 10 am – 6 pm ; extended summer hours
Telephone:	830/606-6029

Conservation Plaza

Owned by the New Braunfels Conservation Society, these priceless structures have been preserved. The Baetge House is a good example of fachwerk construction, a two-story house was built in 1852 by German engineer Carl Baetge 26 miles northwest of city. The house was dismantled and rebuilt on the plaza in 1975. Furnishings include period pieces, mostly of Texas or German origin. Other structures include the Rose Conservatory and the Star Exchange, the Lohse-Fischer Home, the Haelbig Music Studio, the Church Hill School, the Jahn Cabinet Shop, and the Jahn Home. Admission fee.

Activity Details

Hours Open:	Tue – Fri 10 am – 3 pm; Sat/Sun 2 – 5 pm.
Address:	1300 Church Hill Drive

Dry Comal Creek Vineyards

Located just six miles west of New Braunfels, this Hill Country winery and vineyard offers visitors the chance to tour the facilities and sample vintages in the tasting room. Just off Texas 46 West

Activity Details

Hours Open:	Daily noon - 5 pm
Address:	1741 Herbelin Road
Website:	www.drycomalcreek.com
Telephone:	830/885-4121

Gruene

German immigrants established village before 1850; now part of New Braunfels. Historic structures, both ruins and restored, include old homes, stores, art gallery, winery, ice cream parlor, and rustic beer hall, circa 1880, still popular for weekend dances.

If you're in Gruene during the summer, check out the Gruene Country Homestead Inn. The innkeepers at this bed and breakfast inn make their own molasses from sugar cane (grown on the property), actually using the cooker and sugar press obtained from Edwin Hanz, the prior owner of the fachwerk barn and property. For information, 830/606-0216. On Guadalupe River, Gruene Rd. off N. Loop 337.

Activity Details

Address:	1202 Gruene Road
Zipcode:	78130
Website:	www.gruenehomesteadinn.com
Telephone:	830/606-0216

Historic Inns

Faust Hotel - Restored 1920s hotel with ornate, decorative tile, ceiling fans, and candlestick telephones in each room. Veranda Restaurant features Texas and German-style fare; 62 rooms with baths. 240 S Seguin St.

Prince Solms Inn - Small, plain-Texan exterior; exquisite antique furnishings, 14-foot ceilings, orange bronze hardware, garden, and patio flagged with huge stones from a 19th-century prison. Giovanni's restaurant in basement. Eight rooms with baths and two suites. 295 E. San Antonio St.

Landa Park

Exceptionally scenic city park situated among crystal springs heading the Comal River. Towering trees, spring-fed swimming pools, tubing, picnicking, boating, bicycling, hiking and golf. Largest springs in state (more than 8 million gallons an hour) form state's shortest river-2.5 miles. Miniature train ride winds through park.

Lindheimer Home

Ferdinand Jakob Lindheimer (1801-1879) was first to classify much of native Texas flora; more than 30 varieties bear his name. The house, circa 1852, displays the fachwerk construction German settlers adapted to Texas cedar and limestone. Many original furnishings. Part of the collection owned by the New Braunfels Conservation Society. Admission fee.

Activity Details

Hours Open: Open Memorial Day - Aug., daily except Wed, 2 - 5 pm; Sept. - Apr., Sat/Sun. 2 - 5 pm

Address: 491 Comal St.

Museum of Texas Handmade Furniture

Housed in historic (1858) Andreas Breustedt home; displays include dozens of furniture pieces hand-crafted in Texas during 1800s. English ironstone, pewter, and other artifacts from 1700s. One-room log cabin features furnishings and tools. Admission fee.

Activity Details

Hours Open: Memorial Day – Labor Day, Tue - Sat, 10 am - 4 pm; Sun 1 - 4 pm; Labor Day – Memorial Day, Sat/Sun 1 – 4 pm

Address: 1370 Church Hill Drive

Website: www.nbheritagevillage.com

River Camps

River camps/resorts have been popular for decades. Clear, cool spring-fed pools, tubing chutes, rapids, and exceptionally scenic settings for family recreation. Family groups abundant during summer; visitors from northern states during winter. See Visitor Information for details.

River Guides/Outfitters

Several New Braunfels outfitters provide raft and canoe rentals, plus guided float trips. For information, contact Bezdek's Riverside Inn at 830/964-2244; Dos Rios Whitewater Rafting, 830/625-3375; Gruene River Co., 830/625-2800 (greuenervrco@gruene.net); Guadalupe River Station, 830/964-2850; Jerry's Rentals, 830/625-2036 (www.jerrysrentals.com); Maricopa River Rides, 830/964-2222 or 800/460-8891; Landa Falls, 830/627-1440; R-B's Tube Rental, 830/625-5889; Rio Raft Co., 830/964-3613 (rioraft@gvtc.com); Riverbank Outfitters, 830/625-3037 (riverbank@compuvision.net); and Rockin 'R' River Rides, 830/629-9999 or 800/553-5628 (rockinr@rockinr.com).

Scenic Drives

Any of several highways are scenic. R.M. 32, the "Devil's Backbone," northwest of Canyon Reservoir is exceptionally beautiful, as is River Road from New Braunfels to Sattler along Guadalupe River.

Schlitterbahn

65-acre Texas gem named America's No. 1 water-park by the Travel Channel. Located along the banks of the Comal River, Schlitterbahn has something for kids of all ages, including tube chutes, water slides, uphill water coasters, pools, hot tubs, kid's water playgrounds, shady picnic grounds and year-round resort rooms. Amenities include free parking, free use of inner tubes, and guests are welcome to bring in their own picnic basket and cooler into the park; no alcohol or glass containers please. For hours, rates, and room reservations, call 830/625-2351. Admission fee.

Activity Details

Hours Open:	Weekends beginning Apr. 29, daily May 20 - Aug 20; Weekends Aug. 26 - Sept. 17
Address:	400 N. Liberty
Telephone:	830/625-2351
Web Page:	www.schlitterbahn.com

Snake Farm

Features more than 500 reptiles, as well as a variety of monkeys, birds, llamas and Texas longhorns. Open daily during summer 10 am - 7 pm; winter hours Mon - Fri 10 am - 6 pm, Sat & Sun 10 am - 6 pm Closed Tues. Exit 182 on I-35 south of town.

Sophienburg Museum

On hilltop site where Prince Carl of Solms-Braunfels built a log fortress. Displays many of the nobleman's personal effects, Indian artifacts and household items of pioneer era. At Academy Ave. Admission fee.

Activity Details

Hours Open:	Mon – Sat 10 am – 5 pm; Sun 1 – 5 pm
Address:	401 W. Coll Street
Zipcode:	78130
Web Page:	www.nbtex.com/sophienburg

Visitor Information

Details and free literature about New Braunfels historic sites, river camps and river outfitters, accommodations, and current local events available at the Visitor Center at I-35 and Post Road on the north side of the city.

Activity Details

Hours Open:	Daily
Address:	401 W. Coll Street
Telephone:	800/572-2626
Web Page:	www.nbcham.org

Wagenfuehr Home and Buckhorn Barbershop Museum

Part of the historic properties owned by the New Braunfels Conservation Society, this home is a "collector's paradise." It includes a 1900s barbershop; museum features hand-carved miniature circus animals, pictures made from rocks, dolls from around the world, handmade jewelry, and many other items. Admission fee.

Activity Details

Hours Open:	Daily Memorial Day – Aug 2 – 5 pm, closed Wed. Winter Sat/Sun 2 – 5 pm.
Address:	521 W. San Antonio Street
Zipcode:	78130

Appendix 2: River Survey Questions

TXP has been engaged by the City of New Braunfels to assist in measuring the economic impact of river tourism on the local economy. As part of that effort, we are soliciting information on spending patterns of visitors to the area. All individual data will be kept confidential, with results only reported in the aggregate. Thanks for your help.

Location: Guadalupe beginning
 Guadalupe at the end
 Comal beginning
 Comal at the end
 Other

Date: June 30th
 July 7th
 July 19th
 July 28th
 July 29th
 July 31st
 Other

1. Please list the ZIP Code of your residence.
2. Is tubing the primary purpose of your visit?
3. What else, if anything, do you plan to do while in New Braunfels?
4. If you reside outside of Comal County, are you in town for the day or as part of an overnight trip? If you are staying overnight, how long do you plan to be in the area? Are you staying in Comal County?

Day-Trip
Overnight
Number of Nights
Comal County

5. If you are staying overnight, what type of accommodations will you occupy?

Campground or Motorhome
Hotel or Bed and Breakfast in the City of New Braunfels
Hotel or Bed and Breakfast in Comal County (not in the City)
Non-Comal county Hotel or Bed and Breakfast
Other

6. How much do you intend to spend (if applicable) in each of the following categories?

Lodging
Food/Drink
Retail
Entertainment (admissions, etc.)
Other/Miscellaneous

Appendix 3: Detailed Economic Impacts

Table A3.1

Estimated Total Impact of Comal County Overall Travel & Tourism

Industry Sector	Value-Added	Earnings	Employment
Agriculture/Fishing, and Hunting	\$697,145	\$323,288	25
Mining	\$84,134	\$37,041	0
Utilities	\$3,057,836	\$830,667	8
Construction	\$676,276	\$307,849	7
Manufacturing	\$3,153,536	\$1,006,389	24
Wholesale Trade	\$5,567,694	\$1,909,249	30
Retail Trade	\$22,192,208	\$7,453,905	302
Transportation and Warehousing	\$10,887,861	\$3,493,709	164
Information	\$2,760,962	\$759,290	12
Finance and Insurance	\$2,573,096	\$607,060	11
Real Estate and Rental/Leasing	\$10,707,281	\$591,503	18
Prof/ Scientific/Technical services	\$3,029,017	\$1,336,961	26
Management of Companies	\$985,504	\$727,033	11
Admin./ Waste Mgt. services	\$2,260,042	\$819,647	30
Educational services	\$308,464	\$135,559	6
Health Care and Social Assistance	\$24,168,988	\$2,711,631	66
Arts, Entertainment, and Recreation	\$49,749,715	\$21,726,966	1,059
Accommodation and Food Services	\$15,444,335	\$18,279,323	930
Other Services	\$2,340,334	\$1,030,390	44
Total	\$160,644,428	\$64,087,461	2,773

Source: TXP

Table A3.2
Estimated Total Impact of Comal County River Tourism

Industry Sector	Value-Added	Earnings	Employment
Agriculture/Fishing, and Hunting	\$128,556	\$61,767	5
Mining	\$9,874	\$4,462	0
Utilities	\$360,767	\$108,361	1
Construction	\$79,784	\$41,387	1
Manufacturing	\$445,828	\$139,197	4
Wholesale Trade	\$769,245	\$256,621	4
Retail Trade	\$742,997	\$248,816	10
Transportation and Warehousing	\$303,961	\$73,493	2
Information	\$358,400	\$92,872	2
Finance and Insurance	\$322,749	\$73,115	1
Real Estate and Rental/Leasing	\$1,400,876	\$71,971	2
Prof/ Scientific/Technical services	\$337,298	\$139,536	3
Management of Companies	\$68,761	\$57,694	1
Admin./ Waste Mgt. services	\$313,220	\$105,106	4
Educational services	\$40,102	\$17,832	1
Health Care and Social Assistance	\$5,527,800	\$351,086	9
Arts, Entertainment, and Recreation	\$2,675,587	\$1,177,704	58
Accommodation and Food Services	\$5,014,086	\$5,143,650	273
Other Services	\$288,884	\$137,220	6
Total	\$19,188,777	\$8,301,889	387

Source: TXP

Appendix 4: List of Interview Participants

Name	Organizational Affiliation
Adams, Terri	Schlitterbahn
Anderson, Larry	Comal Rapid Transit
Bialick, Christine	Museums
Breads, Je	Corner Tubes
Dalke, Cecilia	Gruene Home Run Batting Cages
Dietert, Mike	New Braunfels Smokehouse
Dussere, Mike	Water-Oriented Recreation District of Comal County
Eager, Cecil	Gruene Merchants
Fischer, Cheryl	Lodging
Fischer, Rodney	Local Business
Herblin, Suzanne	Landa Falls / Wurstfest
Hill, Darren	Schlitterbahn
Laird, Stacy	City of New Braunfels
Lange, Steve	Greater New Braunfels EDF
Meek, Michael	Greater New Braunfels EDF
Moeller, Jeff	Greater New Braunfels EDF
Morrison, Michael	City of New Braunfels
Nally, Mary Jane	Gruene Merchants, Greater New Braunfels EDF
Pence, Nathan	City of New Braunfels
Polk, Mel	Amigo Mels / Gruene Outpost Lodge
Reno, Colie	Texas Tubes
Rivers, Zero	Rockin R River Rides
Robinson, Terry	United Way
Sebert, Jeffrey	Schlitterbahn
Soechting, Laurie	Wildlife Ranch
Williams, Barry	Greater New Braunfels EDF
Wuest, Brad	Natural Bridge Caverns
Young, Jdy	New Braunfels Chamber of Commerce