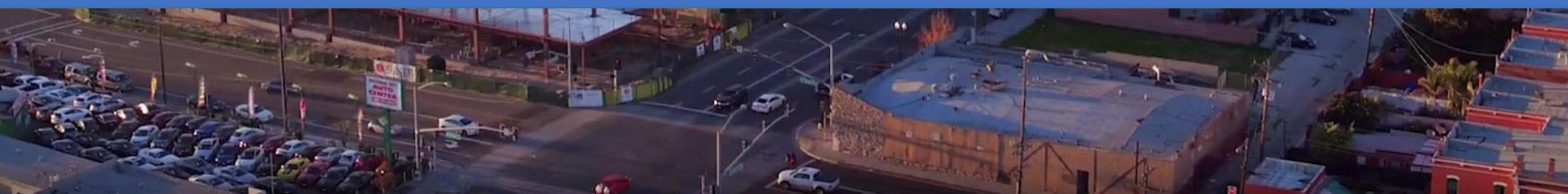
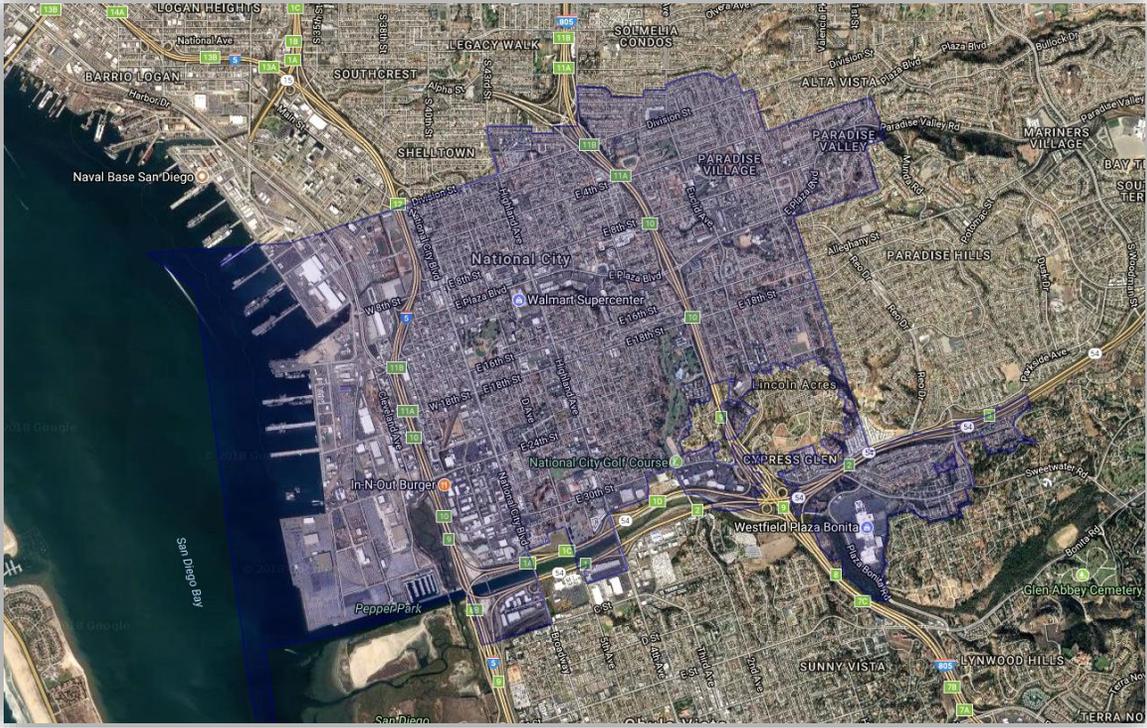




National City Real Estate Roundtable





Barry Foster

Managing Principal of Econsolutions by HDL

WHAT IS INSIGHT MARKET ANALYTICS AND WHY IS IT IMPORTANT?

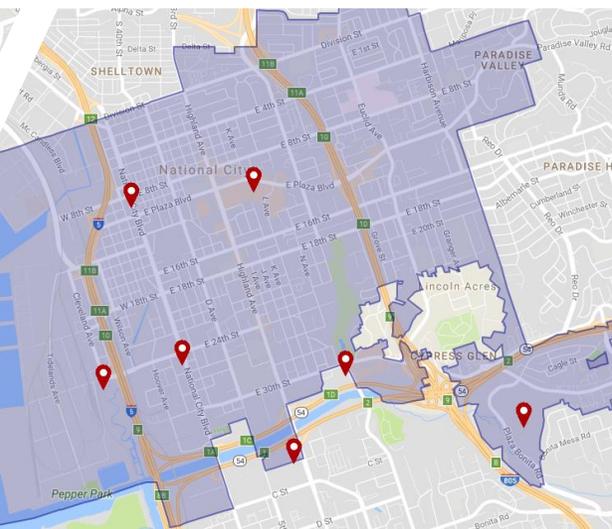
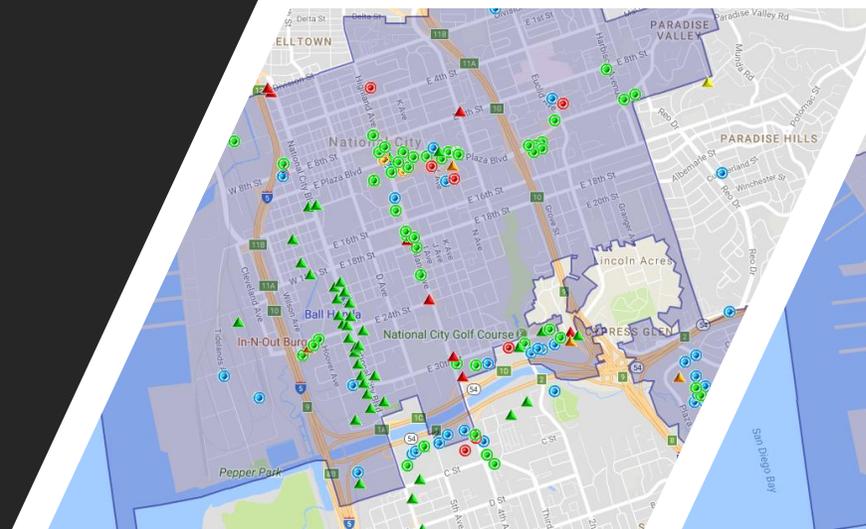
Includes the following:

- Maps
- Consumer Demographic Profiles
- Household Segmentation Profiles
- Employment Profiles
- Consumer Demand & Market Supply Assessments



SELECTING SITES

- City Boundary
- Retail/Restaurant clusters
- Zoning Maps
- Opportunities (Vacancies, development sites, etc...)
- Collaborating with city staff



DEFINING A TRADE AREA

TYPES OF RETAIL CENTERS



Regional Mall, Power Center, Lifestyle Center

8 – 15 Mile T.A.

150 – 800K Square Feet

Large Anchor, Department Stores, General Merchandise, Upscale



Community/Neighborhood Center

3 – 6 Mile T.A.

3 – 400K Square Feet

Discount Department Store, Supermarket, Drug Store

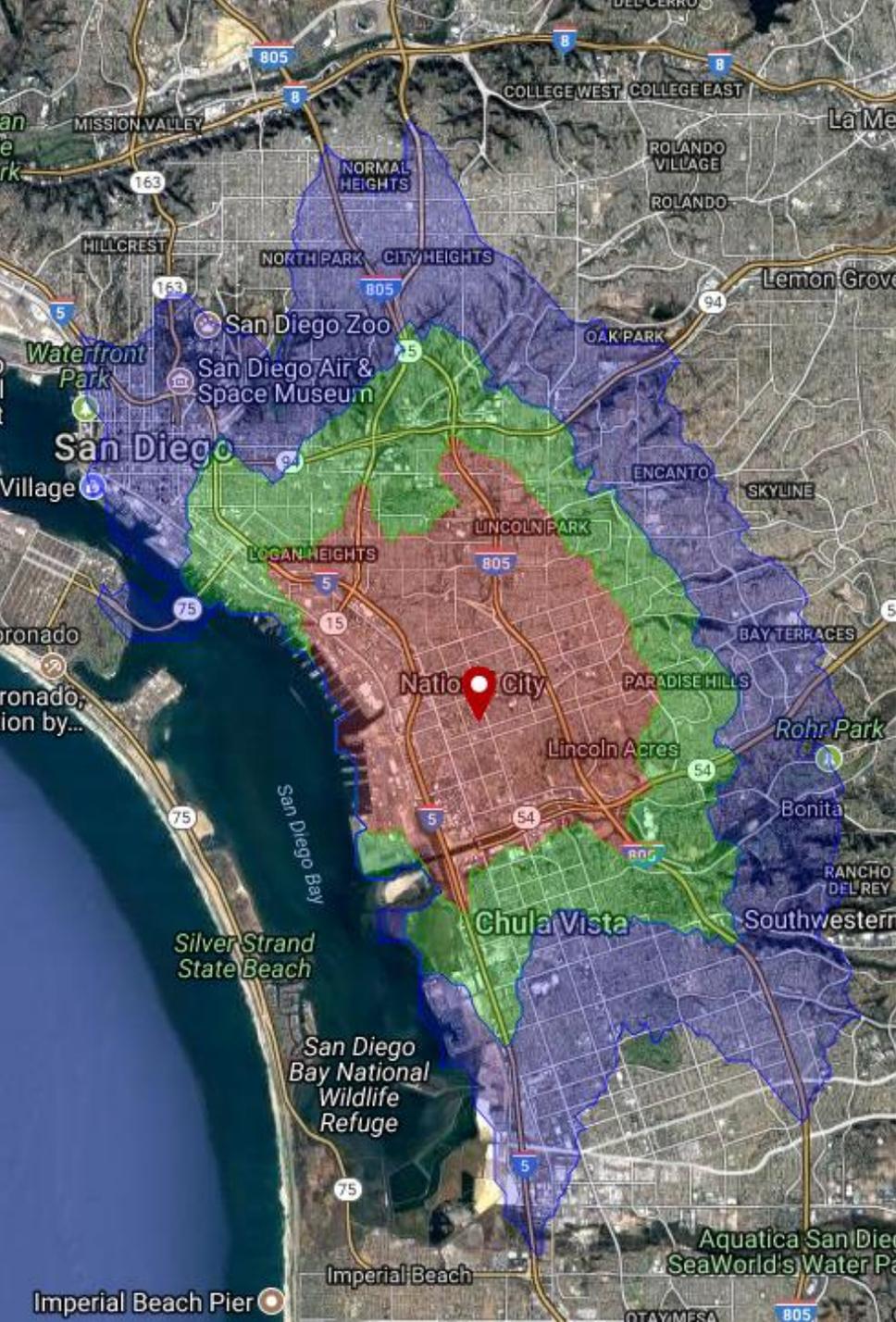


Strip/Convenience Center

<1 – 3 Mile T.A.

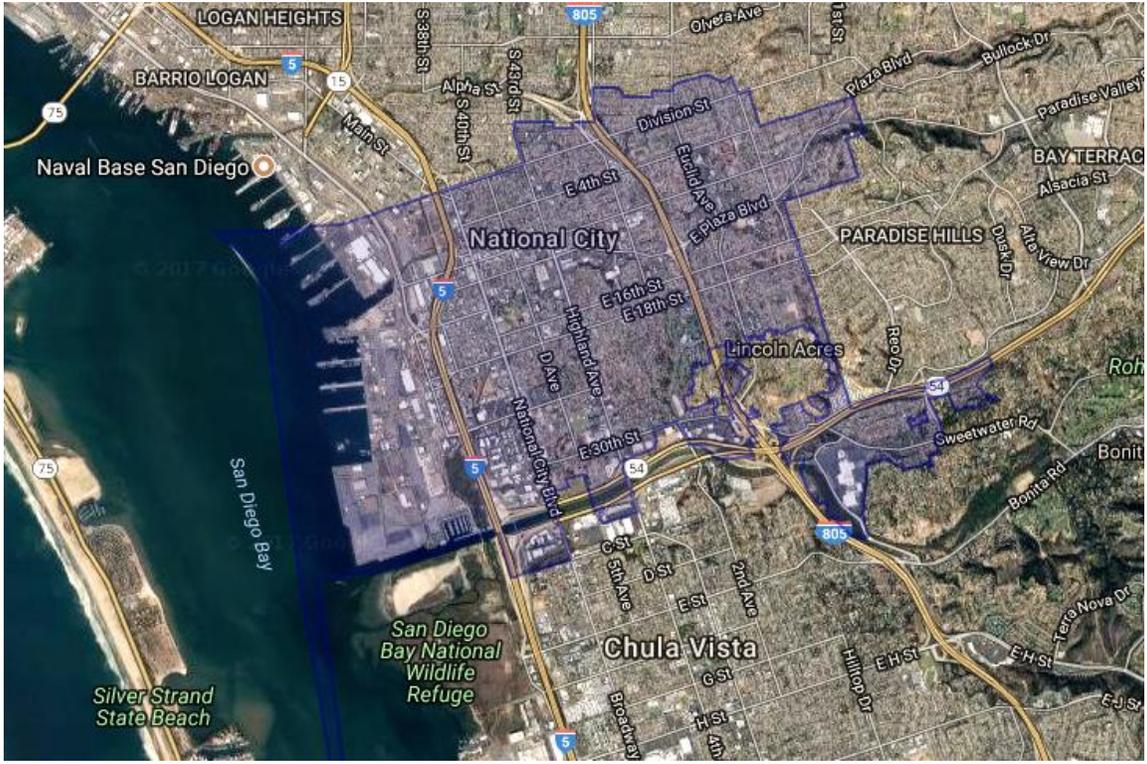
< 30K Square Feet

Convenience Oriented, Mini Mart, Liquor Store



DEFINING A TRADE AREA CONT. TENANT MIX

- Anchors
- Junior Anchors
- Inline Tenants
- End Caps
- Pad Sites
- Stand Alone Stores
- Multiple types of tenants occupy a single shopping center, creating the need to understand each tenants unique trade area. ECONsolutions INSIGHT Market Analytics reports provide a side by side comparison serving the needs of the smallest inline tenants to the largest anchor stores.



Population
 5 Yr Proj Pop Growth
 Households
 Average Age
 Average HH Income
 > \$100K
 Bachelor Degree or Higher

National City	San Diego Co.	California
61,793	3,307,081	39,076,518
2.20%	3.10%	4.60%
16,477	1,167,198	13,230,353
36.3	38.2	38.4
\$55,869	\$91,874	\$92,803
13.70%	33%	32%
12.10%	31%	27.3

NATIONAL CITY MARKET ANALYTICS

NATIONAL CITY MARKET ANALYTICS (HOUSEHOLD SEGMENTATION)

National City has Household LifeStage group differences when compared to San Diego County and the State of California:

(14.1%) Bargain Hunters

Staying Home

(12.6%) Leisure Seekers

Helping Hands

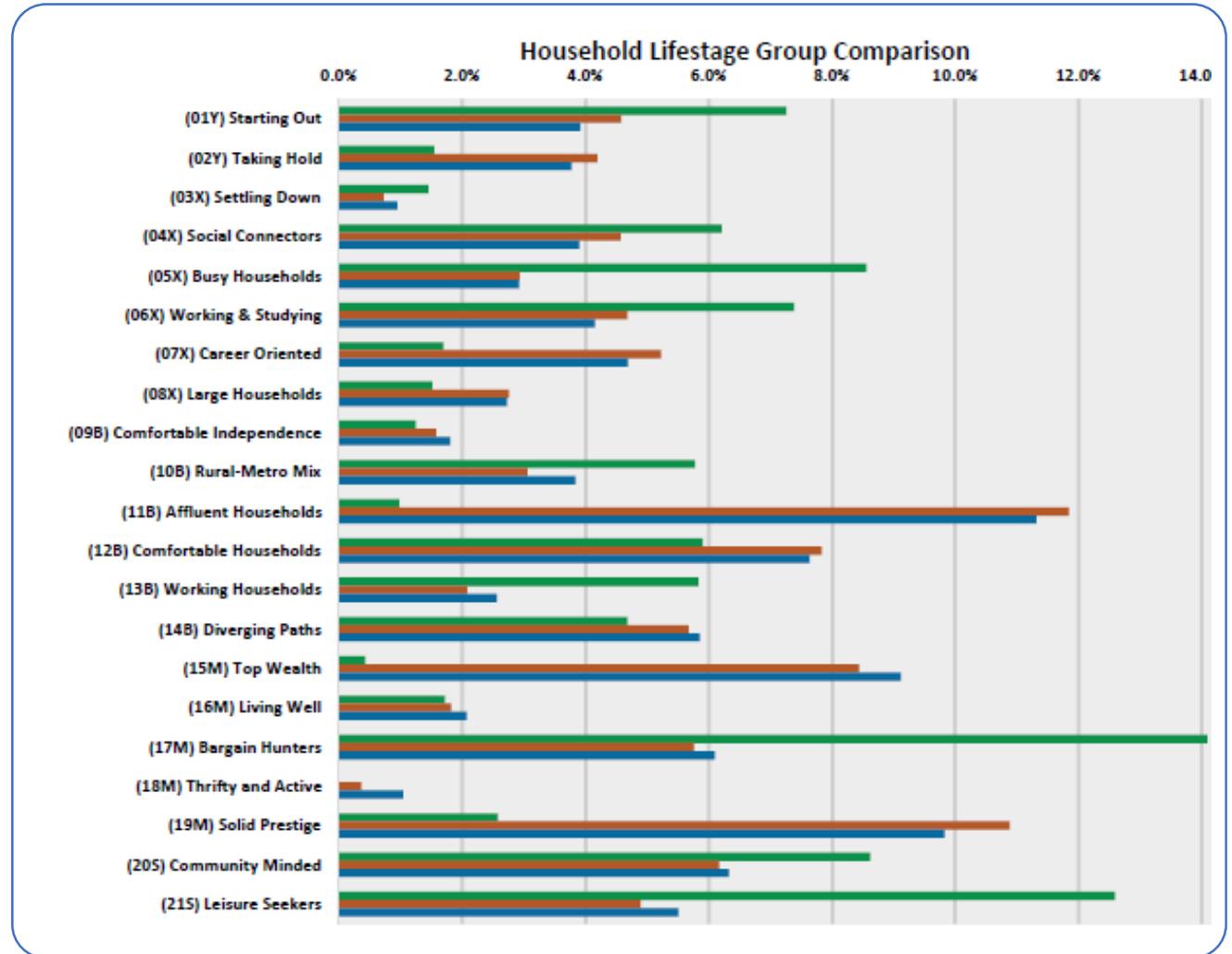
Hobbies & Shopping

(8.6%) Busy Households

Movies & Sports

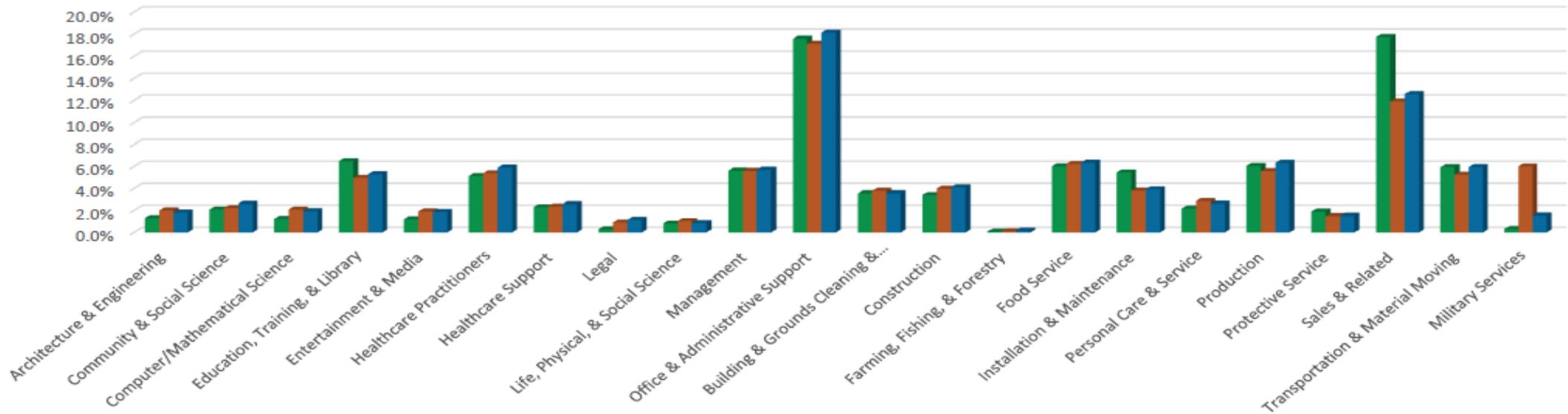
(8.6%) Community Minded

Persistent & Productive



	National City		San Diego County		California	
Daytime Population	63,069		3,894,858		44,511,066	
Student Population	15,083		1,024,181		11,706,856	
Median Employee Salary	41,515		43,929		45,748	
Average Employee Salary	50,581		52,801		54,768	
Wages	#		#		#	
Salary/Wage per Employee per Annum						
Under \$15,000 CrYr	822	3.4%	45,049	2.7%	570,613	3.1%
15,000 to 30,000 CrYr	4,826	19.7%	300,901	18.1%	3,092,111	16.8%
30,000 to 45,000 CrYr	8,147	33.3%	553,541	33.2%	5,468,040	29.8%
45,000 to 60,000 CrYr	4,323	17.6%	308,617	18.5%	3,233,174	17.6%
60,000 to 75,000 CrYr	1,821	7.4%	121,728	7.3%	1,893,037	10.3%
75,000 to 90,000 CrYr	1,525	6.2%	100,314	6.0%	1,526,547	8.3%
90,000 to 100,000 CrYr	739	3.0%	47,554	2.9%	564,161	3.1%
Over 100,000 CrYr	2,293	9.4%	189,279	11.4%	2,005,129	10.9%

Employee's by Occupation



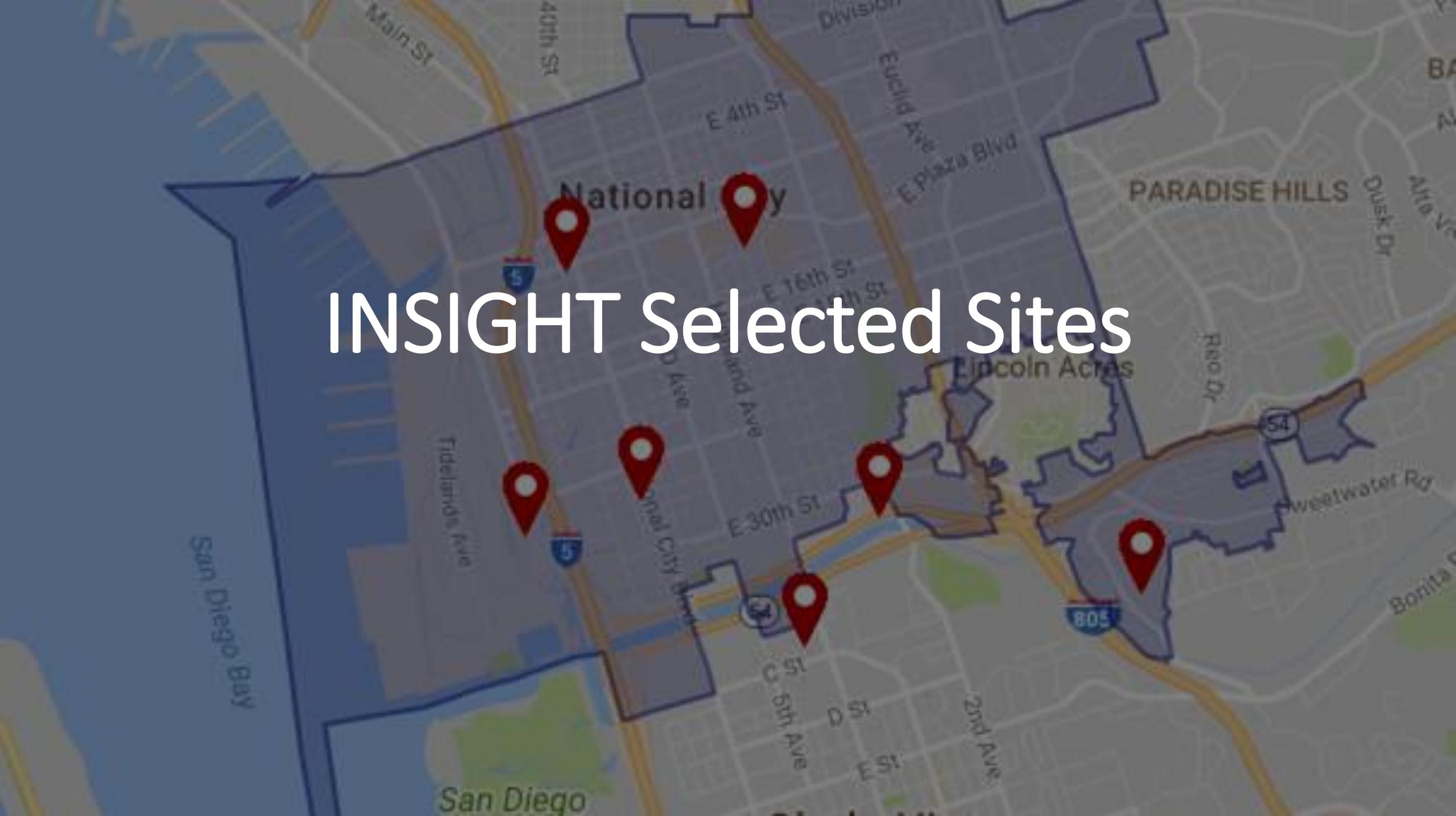
GAP Assessment

Uses data from the following sources:

- Consumer Expenditure Survey (CE), Bureau of Labor Statistics
- U.S. Census Bureau's monthly and annual Retail Trade (CRT)

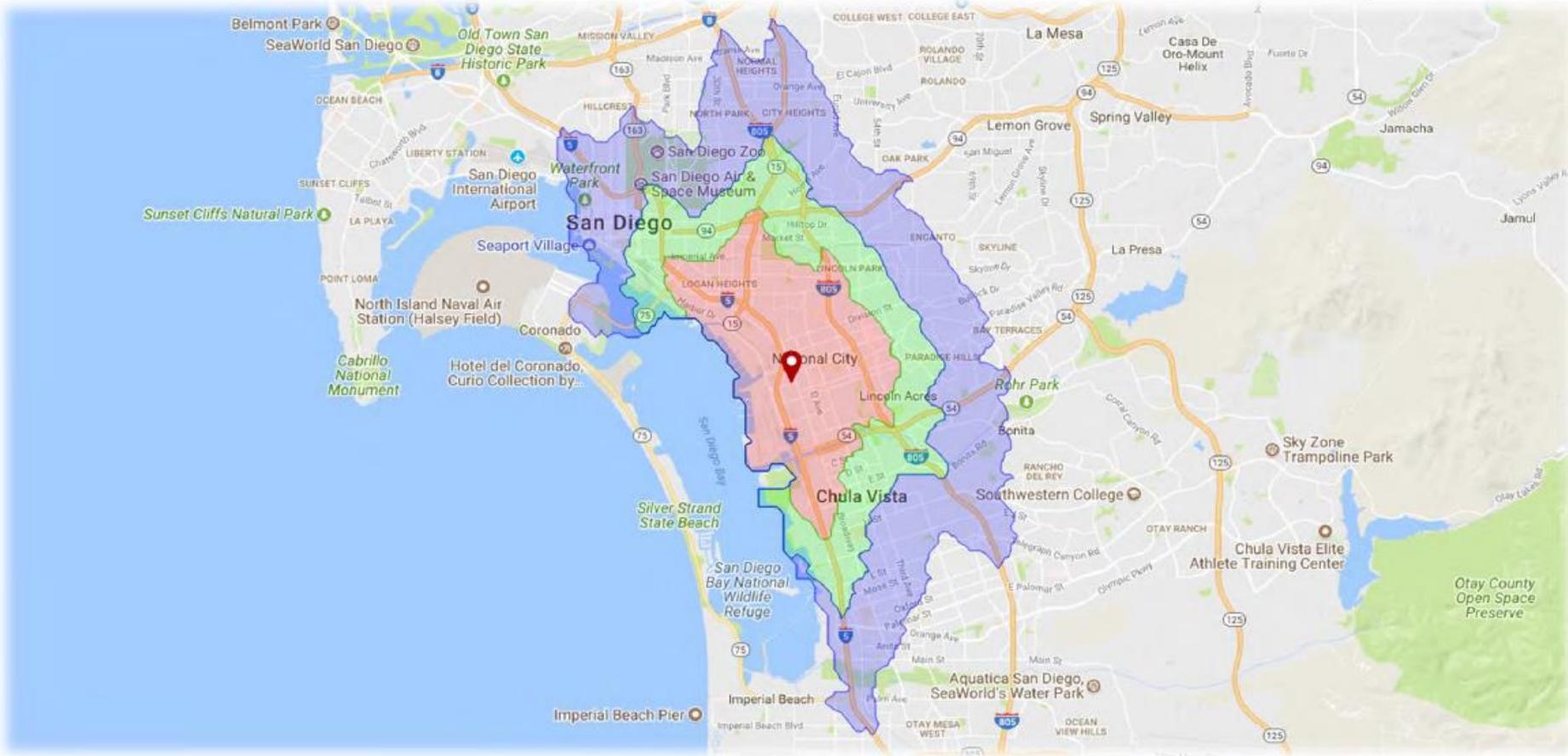
By Establishments	Consumer Demand	Market Supply	Opportunity Gap/Surplus	
Electronic Shopping/Mail Order Houses	\$109,440,312	\$46,103,125	-58%	(\$63,337,187)
Grocery Stores	\$96,643,062	\$56,166,538	-42%	(\$40,476,524)
Electronics/Appliance	\$17,861,177	\$10,587,894	-41%	(\$7,273,283)
Full-Service Restaurants	\$45,710,186	\$39,562,162	-13%	(\$6,148,024)
Other Misc. Store Retailers	\$12,328,932	\$6,565,360	-47%	(\$5,763,572)
Vending Machine Operators (Non-Store)	\$5,252,899	\$0	-100%	(\$5,252,899)
Special Food Services	\$9,196,533	\$4,169,245	-55%	(\$5,027,288)
Lawn/Garden Equipment/Supplies Stores	\$5,501,442	\$1,242,322	-77%	(\$4,259,120)
Direct Selling Establishments	\$5,428,167	\$1,388,600	-74%	(\$4,039,567)
Furniture Stores	\$9,569,679	\$6,957,933	-27%	(\$2,611,746)
Book/Periodical/Music Stores	\$3,824,638	\$2,691,086	-30%	(\$1,133,553)
Florists/Misc. Store Retailers	\$1,195,133	\$356,039	-70%	(\$839,094)
Specialty Food Stores	\$5,595,083	\$4,919,400	-12%	(\$675,683)
Office Supplies/Stationary/Gift	\$5,813,182	\$5,546,117	-5%	(\$267,066)
Used Merchandise Stores	\$2,839,893	\$2,668,932	-6%	(\$170,961)
Beer/Wine/Liquor Stores	\$7,583,054	\$7,667,660	1%	\$84,606
Sporting Goods/Hobby/Musical Instrument	\$10,868,299	\$11,163,386	3%	\$295,087
Bar/Drinking Places (Alcoholic Beverages)	\$2,470,936	\$3,340,541	35%	\$869,605
Health/Personal Care Stores	\$51,133,713	\$53,110,391	4%	\$1,976,679
Home Furnishing Stores	\$8,508,062	\$10,992,442	29%	\$2,484,380
Automotive Parts/Accessories/Tire	\$15,199,716	\$18,902,409	24%	\$3,702,693
Jewelry/Luggage/Leather Goods	\$5,546,809	\$9,750,775	76%	\$4,203,966
Shoe Stores	\$5,503,887	\$10,705,618	95%	\$5,201,730
Gasoline Stations	\$69,971,264	\$79,239,764	13%	\$9,268,500
Other General Merchandise Stores	\$97,074,032	\$107,582,703	11%	\$10,508,671
Limited-Service Eating Places	\$42,236,403	\$54,578,225	29%	\$12,341,822
Other Motor Vehicle Dealers	\$8,995,122	\$24,001,688	167%	\$15,006,566
Clothing Stores	\$42,304,124	\$62,783,078	48%	\$20,478,954
Building Material/Supplies Dealers	\$48,693,608	\$85,731,546	76%	\$37,037,939
Department Stores	\$25,695,654	\$78,763,707	207%	\$53,068,053
Automotive Dealers	\$159,010,567	\$486,195,363	206%	\$327,184,797
Consumer Demand/Market Supply Index	\$936,995,566	\$1,293,434,048		72

INSIGHT Selected Sites



Downtown National City

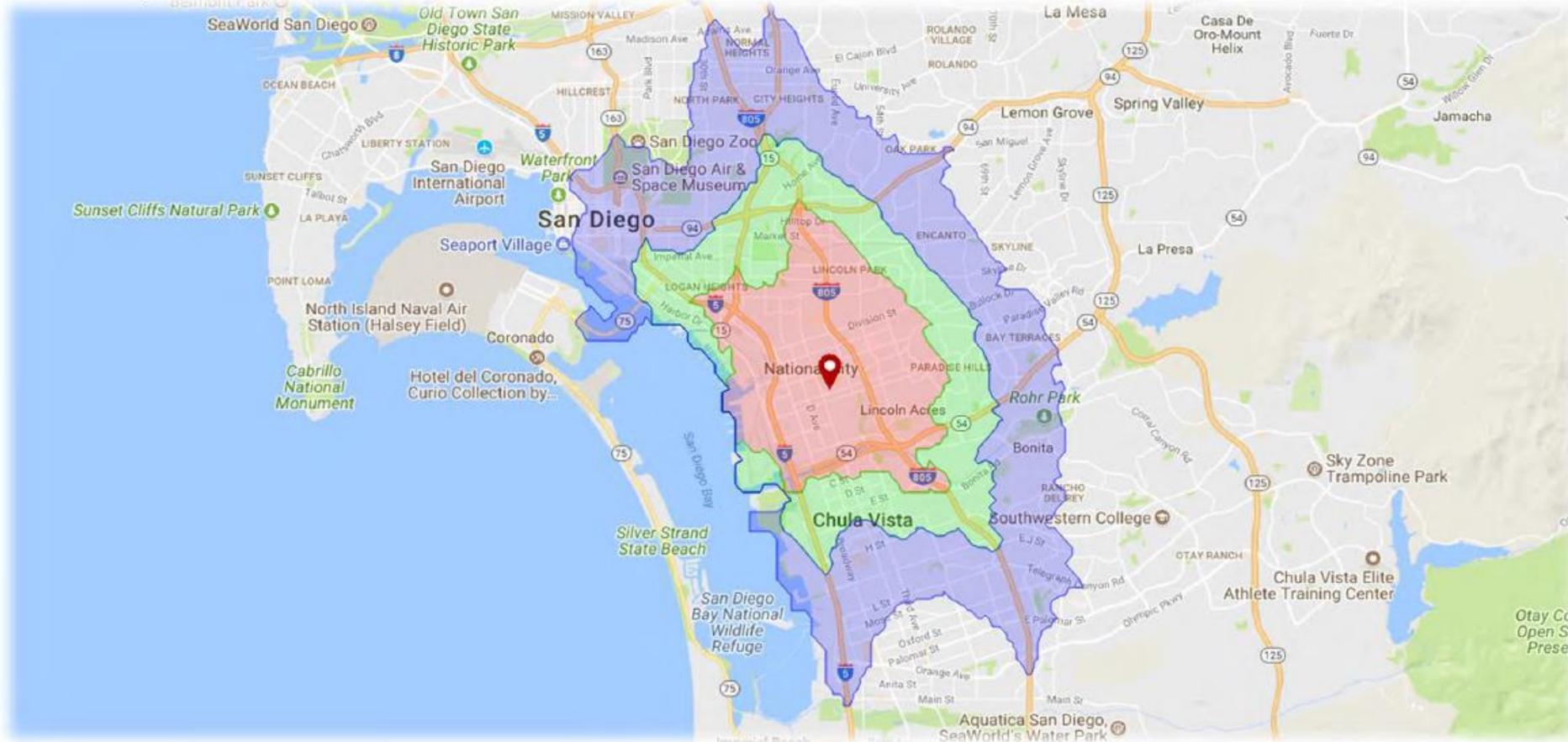
National City Blvd & 8th St, National City, CA



	5 Minutes	7 Minutes	10 Minutes
Population	127,202	230,339	465,914
Daytime Population	114,667	235,679	505,699
Households	32,271	67,783	158,976
Average Age	34.1	35.3	36.6
Average HH Income	\$47,008	\$56,228	\$67,023
White Collar (Residents)	41%	47%	55%
Some College or Degree	36%	42%	50%

Traffic Counts	
National City Blvd & W 5th St	> 14,600
National City Blvd & W 9th St	> 12,900
National City Blvd & 11th St	> 13,700
W 8th St & Roosevelt Ave	> 18,500
I-5 @ W 8th St	> 172,000

Plaza Boulevard
E. Plaza Blvd. & L Ave.
National City, CA

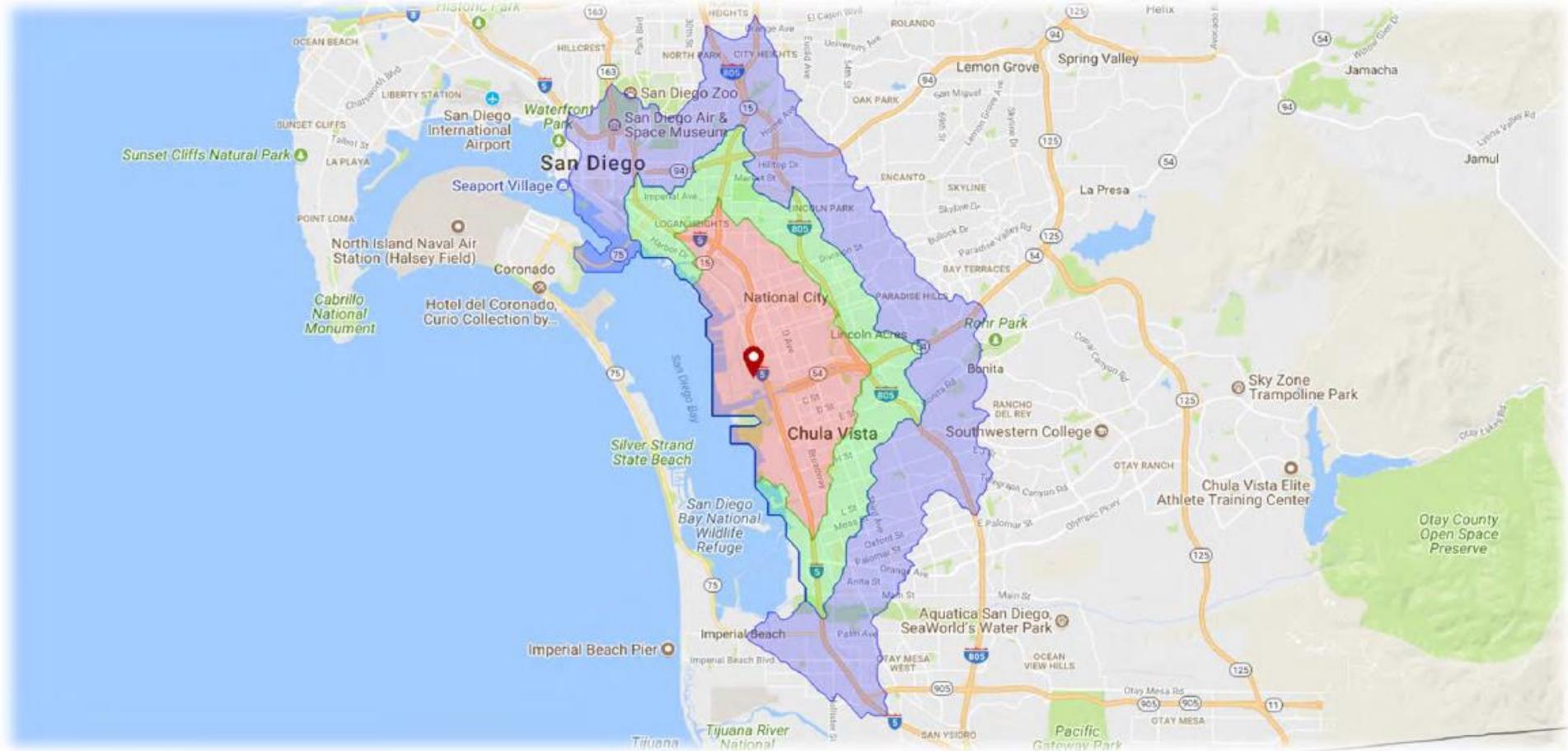


	5 Minutes	7 Minutes	10 Minutes
Population	121,544	226,695	463,745
Daytime Population	107,622	195,203	461,610
Households	30,949	61,850	150,843
Average Age	35.2	35.6	36.5
Average HH Income	\$54,218	\$56,524	\$65,612
White Collar (Residents)	45%	46%	54%
Some College or Degree	40%	42%	49%

Traffic Counts	
E Plaza Blvd & L Ave	> 17,600
E Plaza Blvd & E Ave	> 11,700
E Plaza Blvd & I-805	> 31,200
Highland Ave & E 8th St	> 17,400
I-805 @ 8th St	> 200,000

Bay Marina & Cleveland

Bay Marina Dr & Cleveland Ave, National City, CA

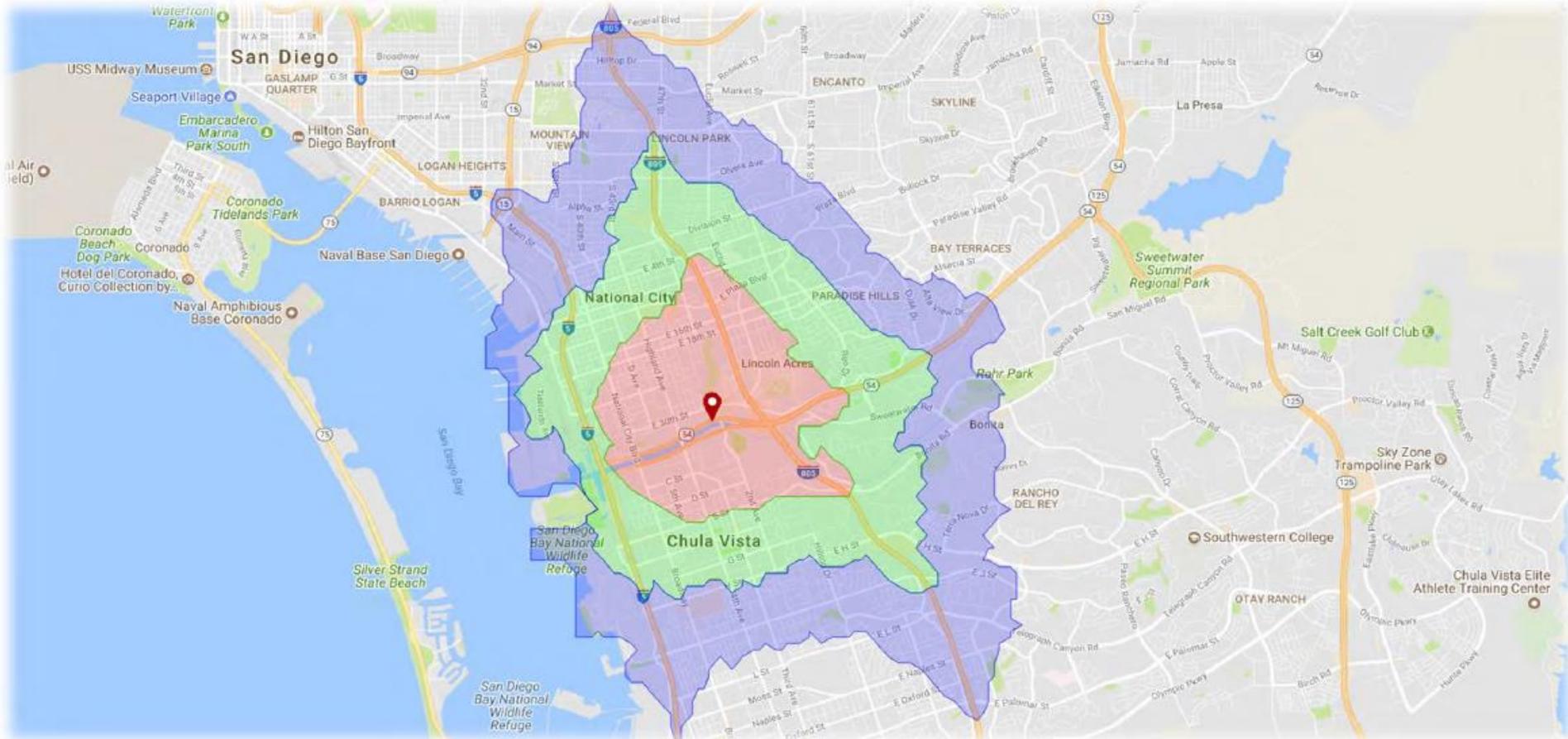


	5 Minutes	7 Minutes	10 Minutes
Population	96,123	189,797	410,346
Daytime Population	95,170	186,840	448,514
Households	26,435	53,558	131,915
Average Age	34.8	35.2	36.4
Average HH Income	\$47,519	\$52,354	\$63,585
White Collar (Residents)	43%	44%	52%
Some College or Degree	38%	39%	47%

Traffic Counts	
W 24th St & Haffley Ave	> 9,400
W 24th St @ I-5	> 19,200
I-5 @ Mile of Cars	> 160,000
MTS Blue Line	> 52,000/Week

Sweetwater Road

Sweetwater Rd & E 30th St, National City, CA

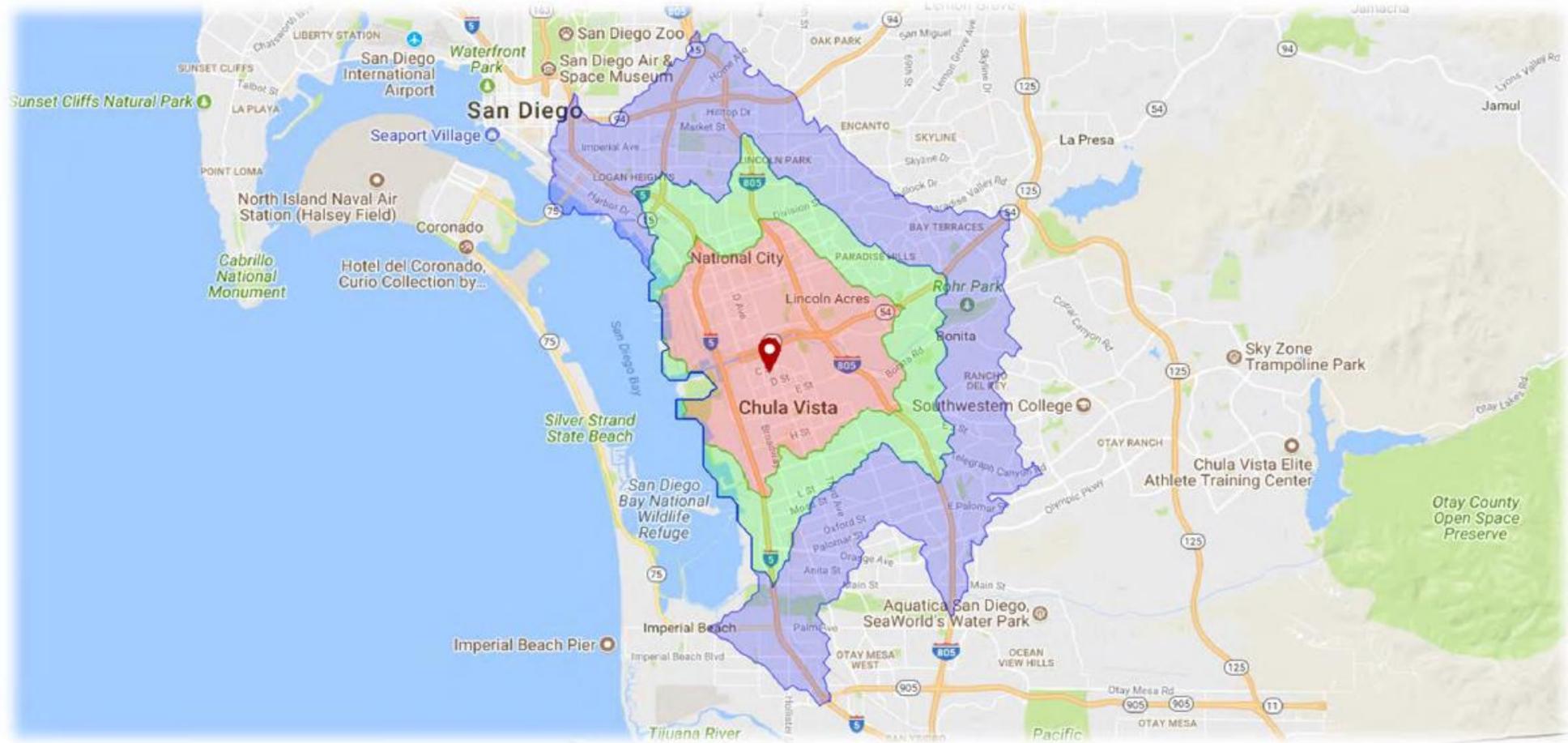


	3 Minute	5 Minute	7 Minute
Population	41,082	112,120	209,044
Daytime Population	39,127	106,816	187,575
Households	12,693	34,721	60,089
Average Age	37.2	37.5	36.6
Average HH Income	\$56,323	\$58,118	\$60,897
White Collar (Residents)	47%	49%	51%
Some College or Degree	44%	45%	46%

Traffic Counts	
Sweetwater Rd & Prospect St	> 26,300
E 30th St & L Ave	> 20,600
Highland Ave & E 30th St	> 21,200
I-805 @ Euclid Ave	> 200,000

South Bay Marketplace

3410 Highland Ave, National City, CA



	5 Minute	7 Minute	10 Minute
Population	94,181	180,958	379,698
Daytime Population	102,132	176,827	341,576
Households	29,162	52,756	110,165
Average Age	37.1	36.7	36.4
Average HH Income	\$56,118	\$58,775	\$61,556
White Collar (Residents)	49%	50%	51%
Some College or Degree	45%	44%	46%

Traffic Counts	
Highland Ave & S Bay Fwy	> 26,500
4th Ave & C St	> 31,700
S Bay Fwy @ 4th St	> 110,000

Westfield Plaza Bonita

3030 Plaza Bonita Rd
National City, CA

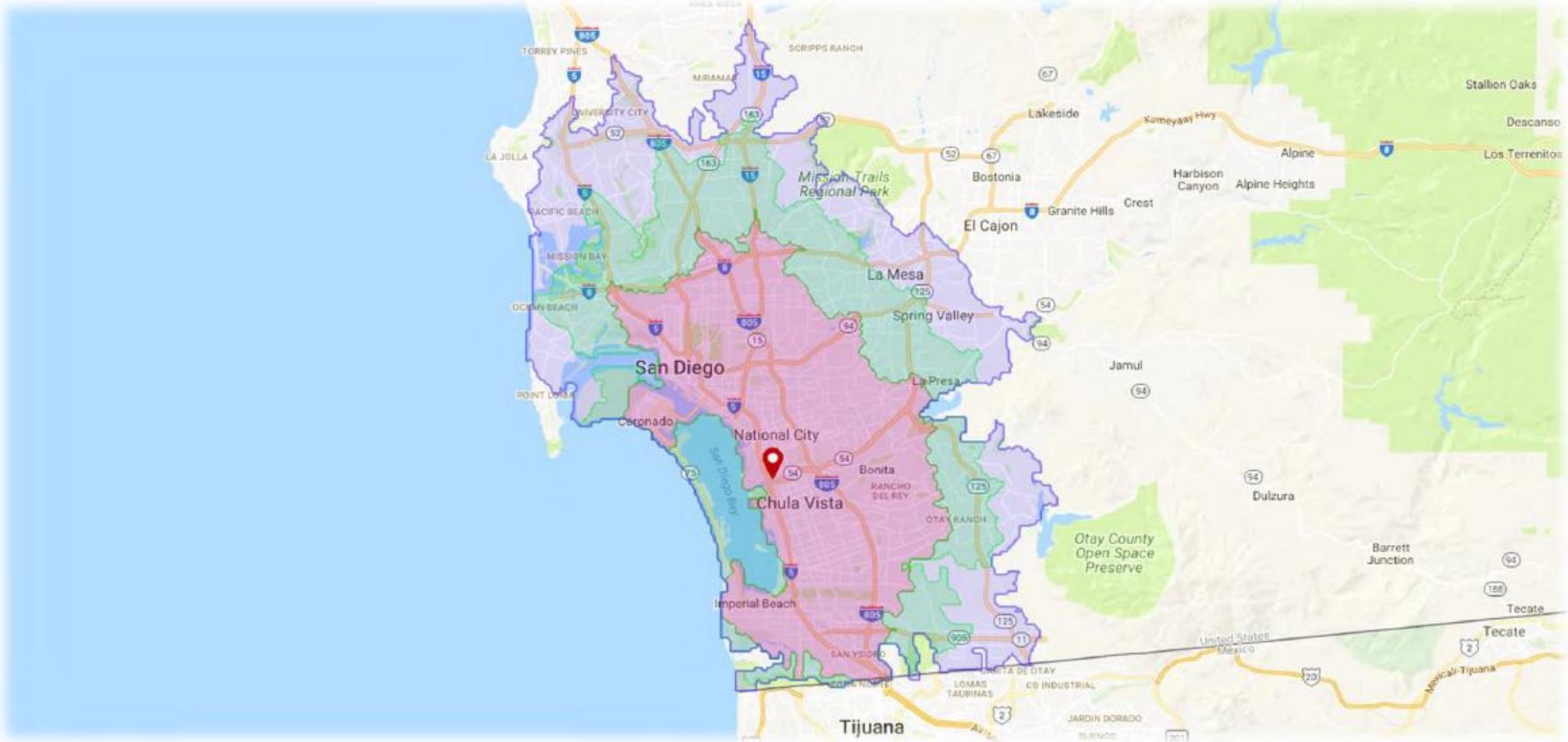


	5 Minutes	10 Minutes	15 Minutes
Population	91,674	402,315	892,879
Daytime Population	85,735	336,203	843,742
Households	29,169	115,436	288,137
Average Age	38.7	36.8	36.7
Average HH Income	\$67,541	\$66,853	\$69,220
White Collar (Residents)	56%	54%	57%
Some College or Degree	52%	50%	52%

Traffic Counts	
I-805 @ Bonita Rd	> 228,000
Bonita Rd & I-805	> 45,000
Sweetwater Rd & Cypress St	> 22,800
Plaza Bonita Rd & Ring Rd	> 17,900

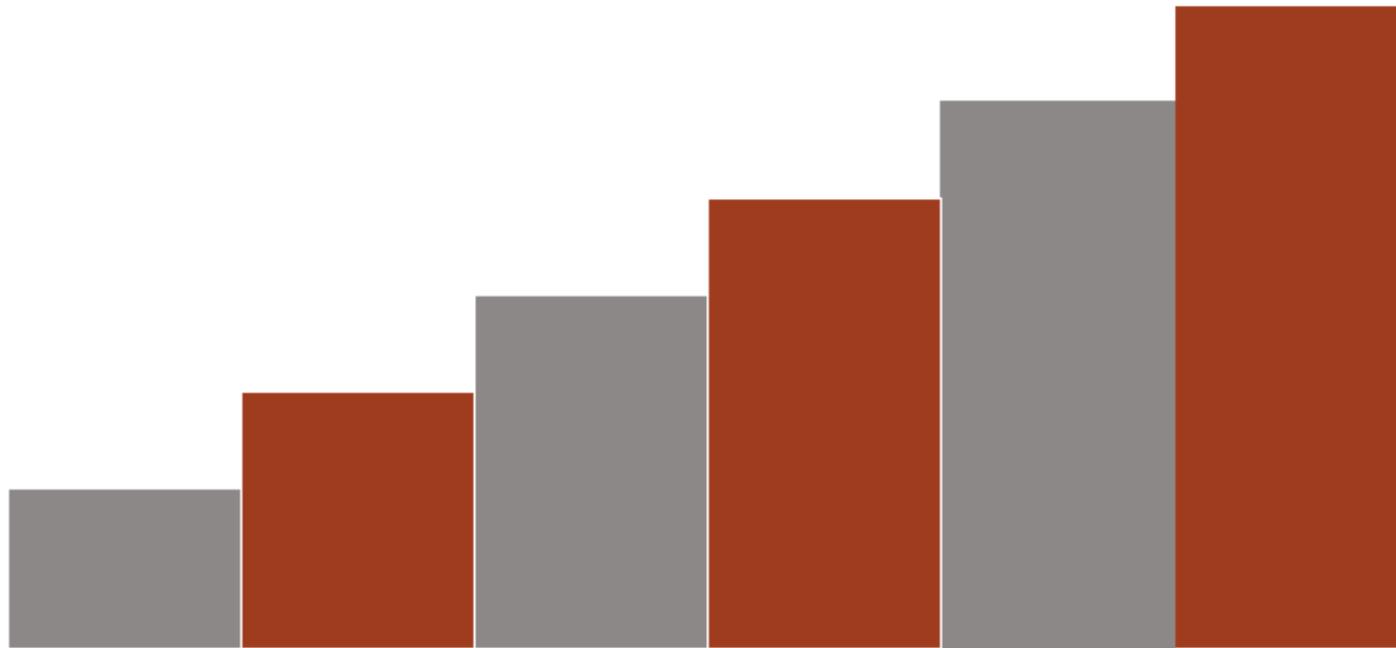
Mile of Cars

National City Blvd & Mile of Cars Way, National City, CA



	15 Minutes	20 Minutes	25 Minutes
Population	891,960	1,259,176	1,537,149
Daytime Population	900,127	1,509,251	1,776,062
Households	304,099	436,199	550,372
Average Age	37.1	37	37.5
Average HH Income	\$71,776	\$75,929	\$81,016
White Collar (Residents)	58%	61%	64%
Some College or Degree	53%	57%	60%

Traffic Counts	
National City Blvd & E 17th St	> 13,300
National City Blvd & E 20th St	> 13,300
National City Blvd & E 27th St	> 14,900
National City Blvd & W 33rd St	> 17,800
Mile of Cars Way & National City Blvd	> 14,200
I-5 @ 24th St	> 160,000



Retail Assessment

Retail Assessment

Examined the National City retail environment to assist in future growth & revenue possibilities

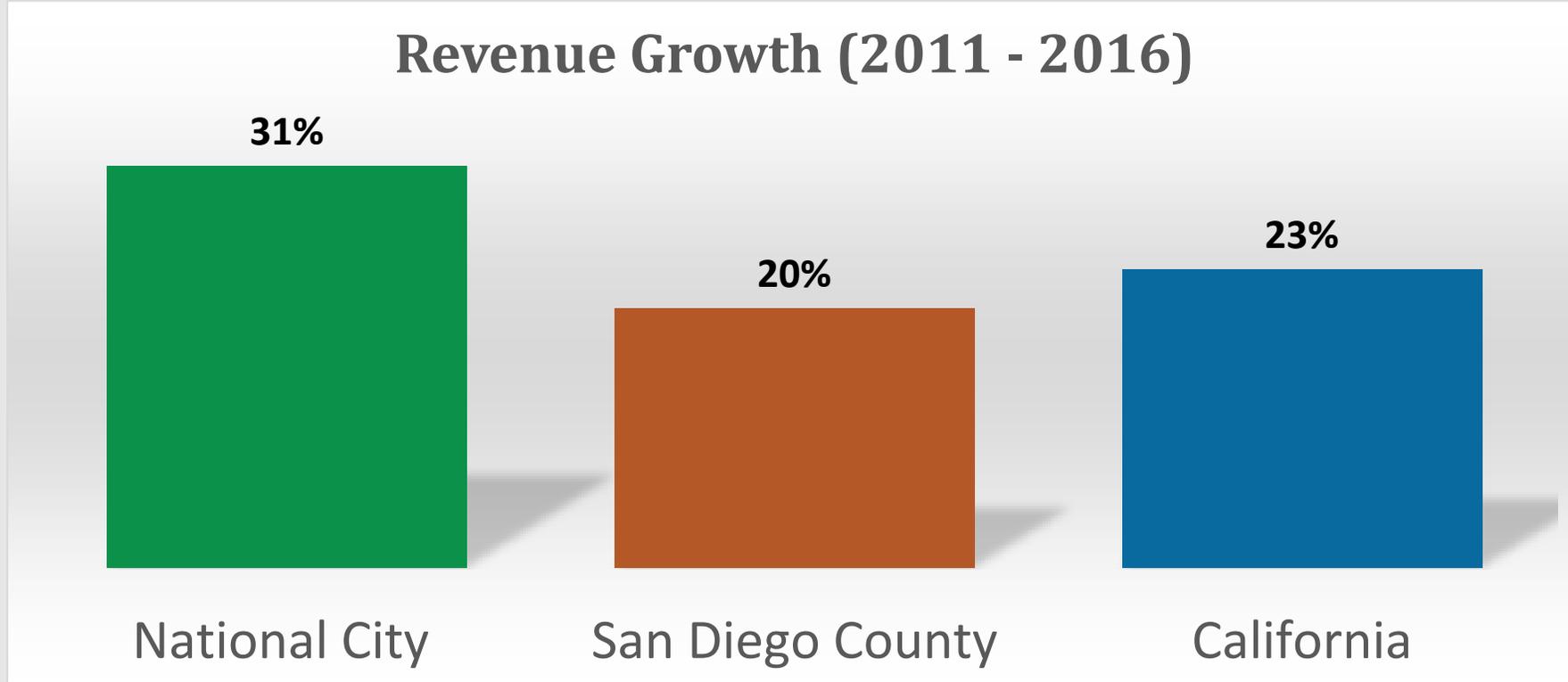
Examined sales tax revenues over a five-year period (2011-2016)

Major Industry
Groups

Per Capita Analysis

Retailer &
Restaurant
Performance

Revenue Growth



Revenue Growth Continued

New Motor Vehicle Dealers

34%

of sales tax revenues
(2016)

49%

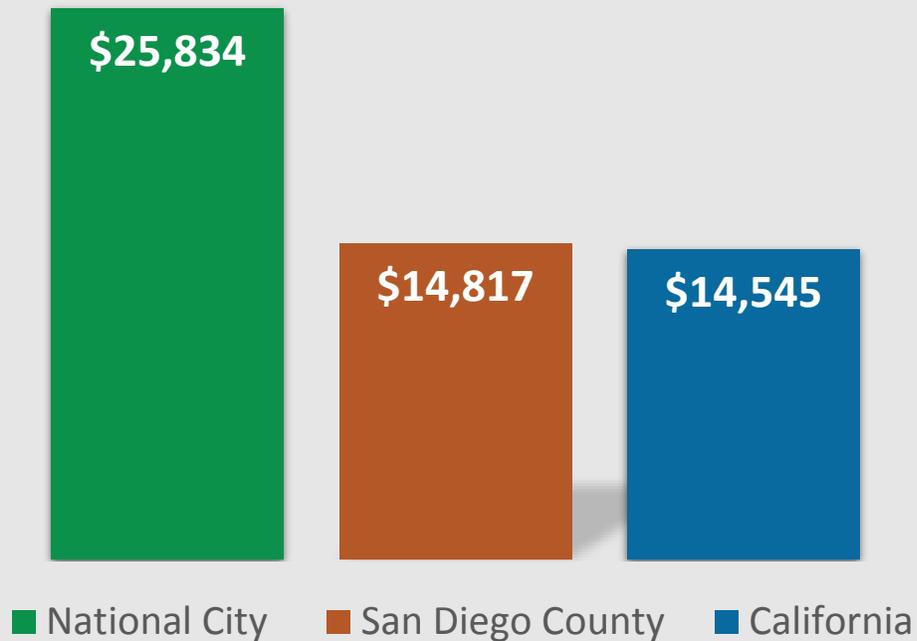
of total growth (2011-
2016)

Removing new car
sales revenues grew by

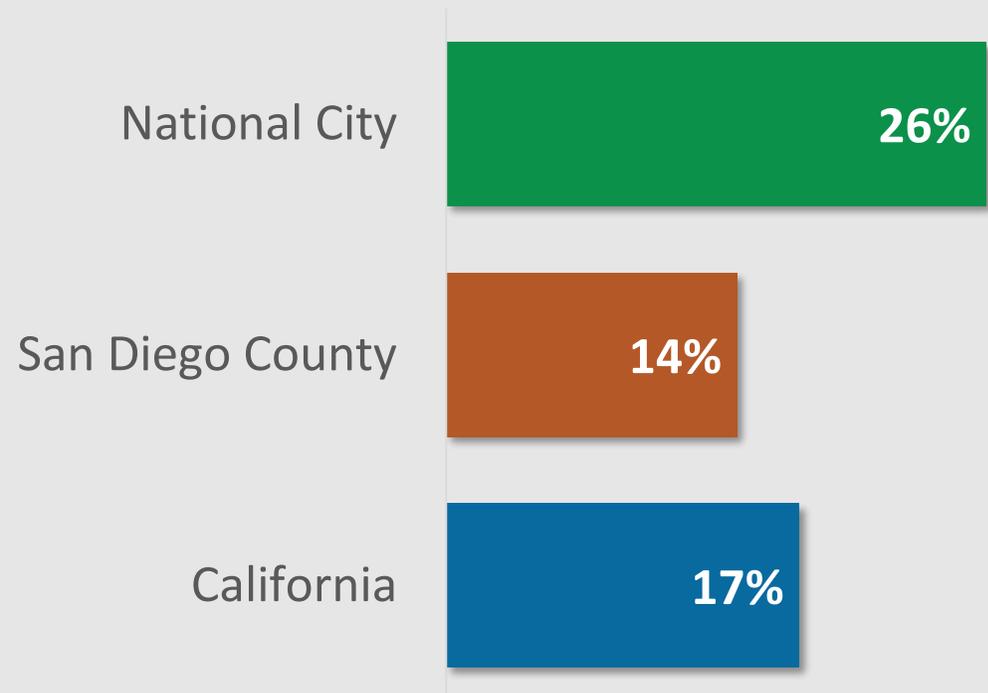
16%

Average Sales \$'s Per Capita

Sales \$ Per Capita - 2016



Sales \$ Per Capita Growth (2011-2016)



Average Sales \$'s Per Capita Continued

Sales Dollars Per Capita Growth (2011-2016) By Major Industry Group

Major Industry Group	National City Growth	San Diego County Growth
Food & Drugs	9%	8%
Fuel & Service Stations	-31%	-29%
General Consumer Goods	14%	3%
Restaurants & Hotels	33%	29%

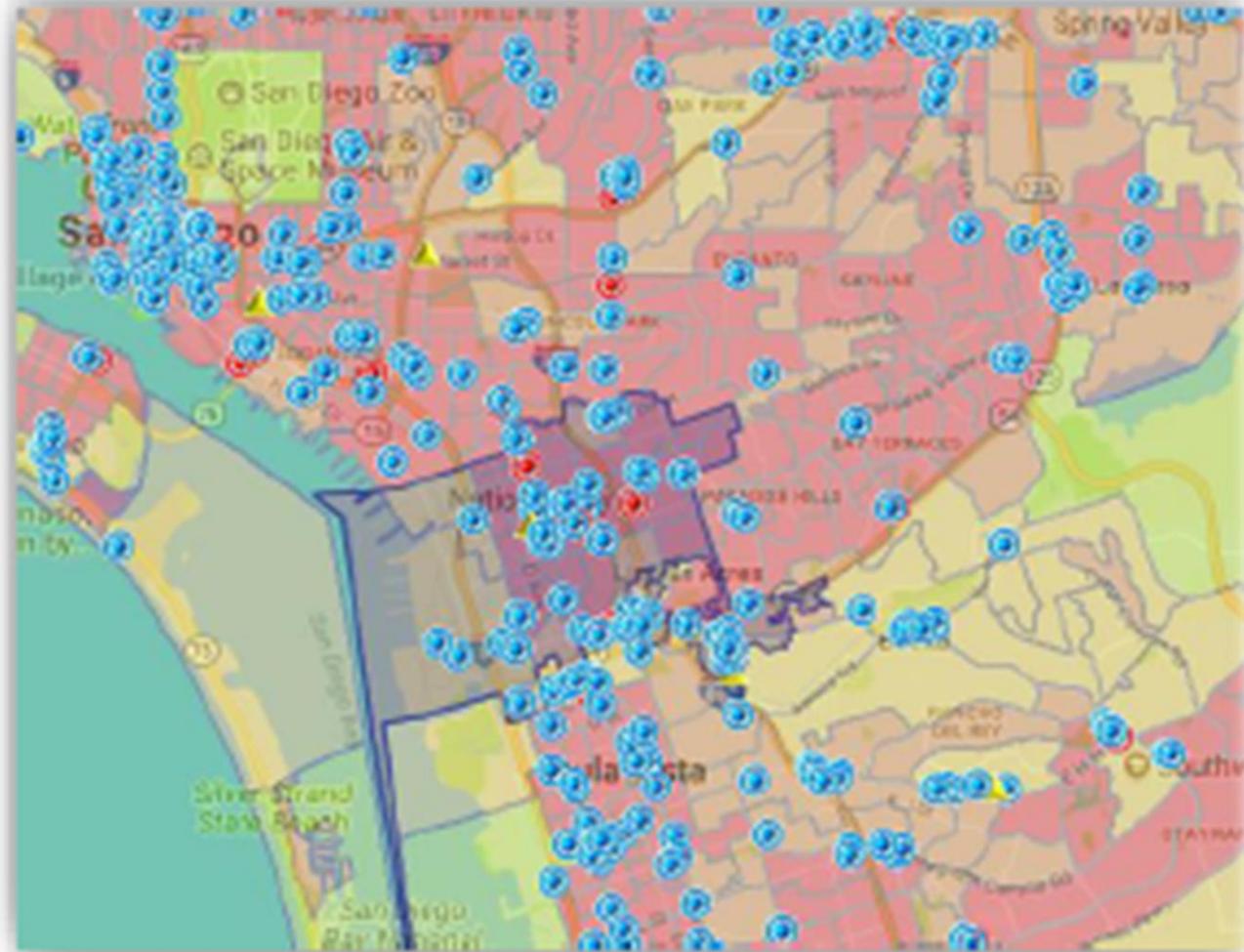
Figure 1 | National City, CA - Population Density and Retail Clustering

Pop Density

- Less than 200
- 200 to 1,500
- 1,500 to 3,500
- 3,500 to 7,000
- 7,000 or more

AggData Locations

- General Merchandise
- Retail
- Markets



Retail & Restaurant Performance

- Sampled **46** National & Regional Firms
- **38 (83%)** performed above the statewide average for their respective company

Firm	Business Type	Firm	Business Type
99 Cents Only	Variety Stores	MAC Cosmetics	Specialty Retailers
Aeropostale	Family Apparel	Macys	Department Stores
Applebee's	Casual Dining	McDonald's	Quick-Service
AT&T Mobility	Electronics/Appliances	Mor Furniture 4 Less	Home Furnishings
AutoZone	Automotive Supply Stores	Nordstrom Rack	Department Stores
Big Lots	Variety Stores	Office Depot	Office Supplies
Carl's Jr	Quick-Service	Old Navy	Family Apparel
CVS Pharmacy	Drug Stores	O'Reilly Auto Parts	Automotive Supply Stores
Denny's	Casual Dining	Outback Steakhouse	Casual Dining
Discount Tire	Automotive Supply Stores	Panda Express	Fast-Casual
El Super	Grocery Stores	Petco	Specialty Retailers
Express	Family Apparel	Popeye's Chicken	Quick-Service
Foot Locker	Shoe Stores	Probuild Company	Building Materials
Forever 21	Women's Apparel	Red Robin	Casual Dining
GameStop	Electronics/Appliances	Ross/dd's Discounts	Family Apparel
Grocery Outlet	Grocery Stores	Smart & Final	Grocery Stores
H & M	Family Apparel	T Mobile	Electronics/Appliances
Hollister	Family Apparel	Target	Discount Department Stores
IHOP	Casual Dining	Toys R Us	Specialty Retailers
In N Out Burgers	Quick-Service	Vallarta Supermarket	Grocery Stores
Jack in the Box	Quick-Service	Victoria's Secret	Women's Apparel
JC Penney	Department Stores	Walgreens	Drug Stores
Johns Incredible Pizza	Casual Dining	Walmart Supercenter	Discount Department Stores

Questions

ECONsolutionsbyHdL.com

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ECONSolutions
By HdL

INSIGHT
MARKET ANALYTICS
by **ECON**Solutions

National City
Planning Department

Martin Reeder
Principal Planner

Craft Beer



Craft Beer

- Conditional Use Permit historically required
- Changing industry in the region
- Craft Beer Ordinance
- Wine & Distilled Spirits
- New “By Right” process
- Mixed-Use & Industrial Zones

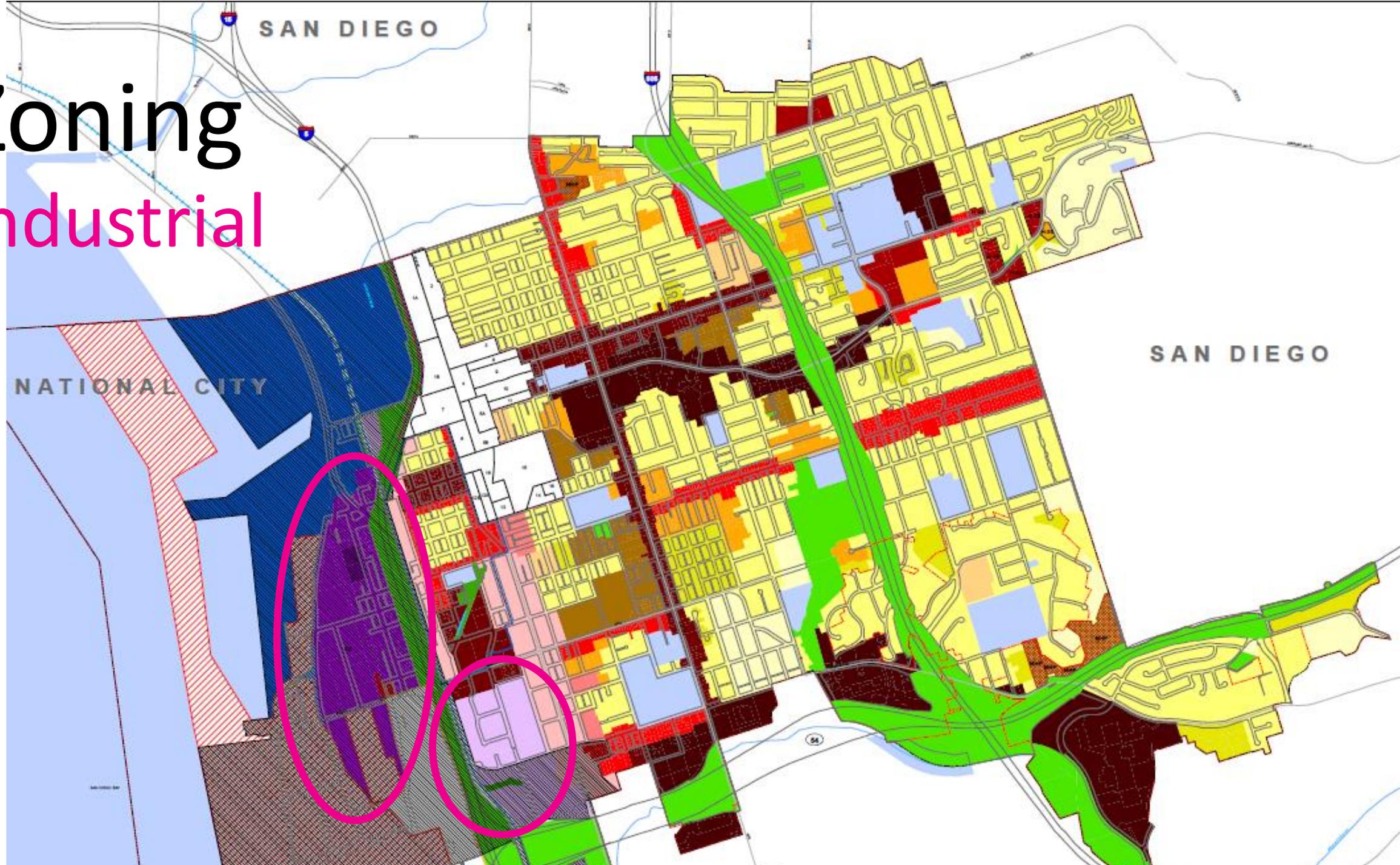


Zoning

Mixed-Use



Zoning Industrial



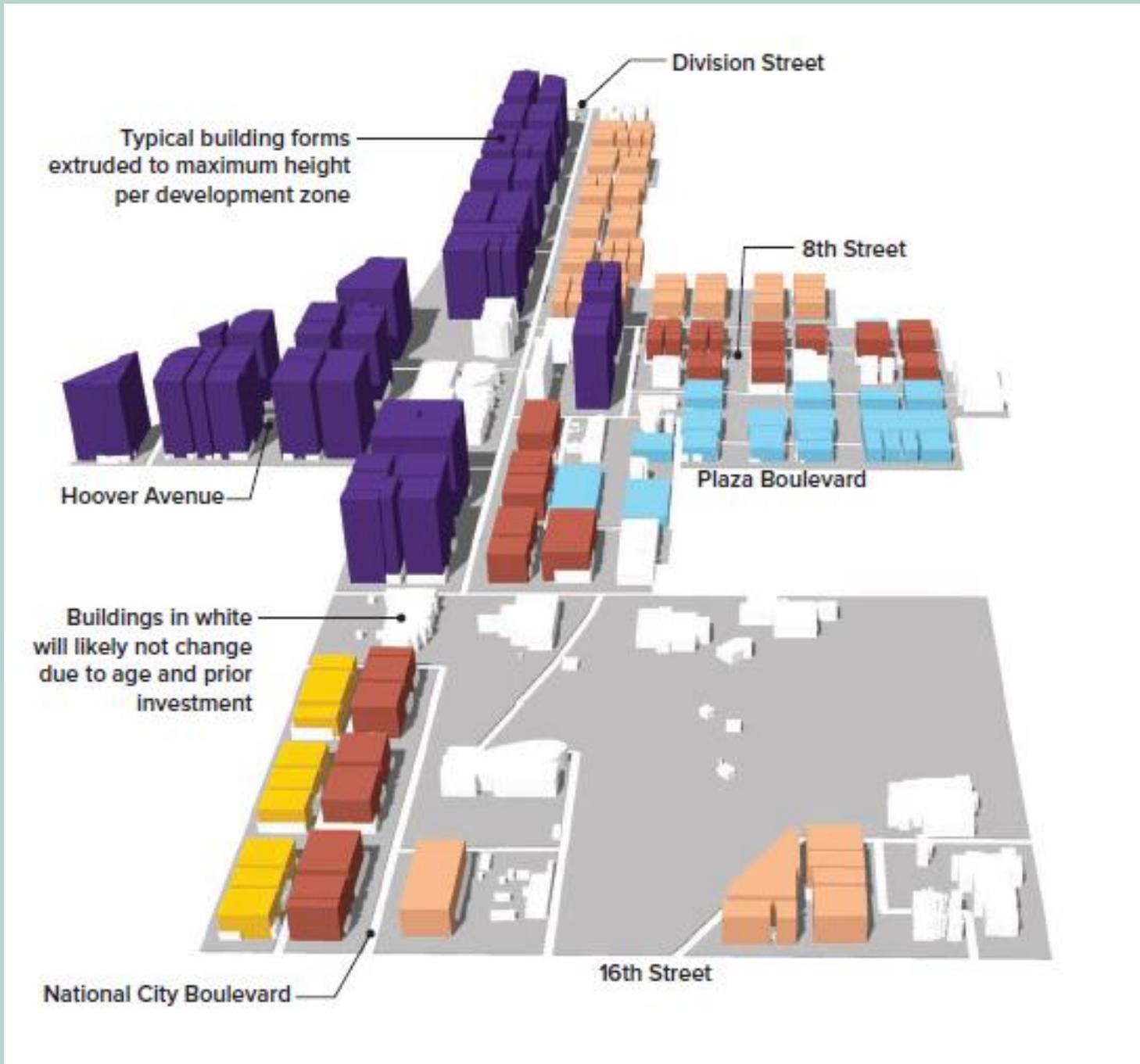


Downtown Specific Plan



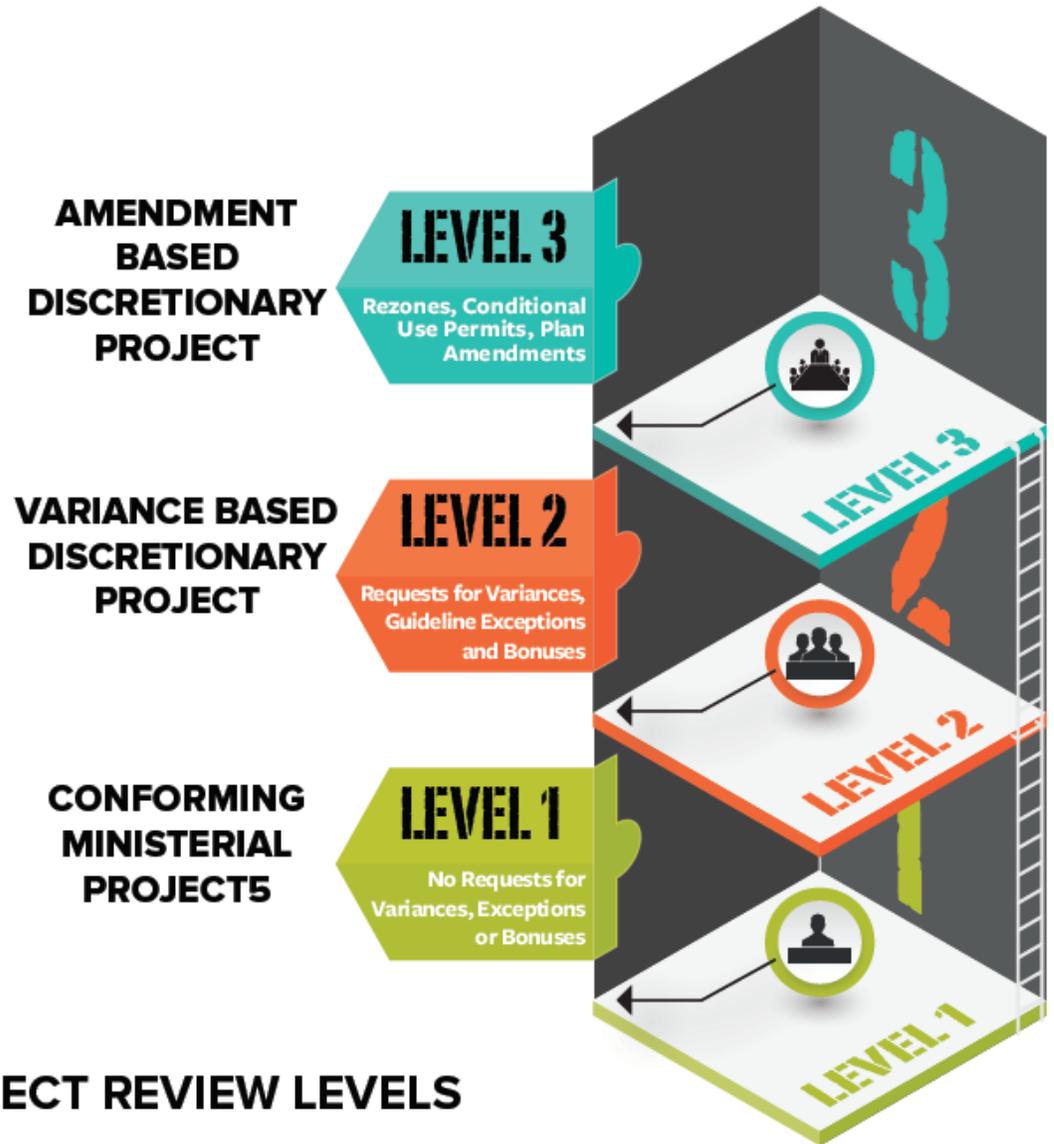
Updates

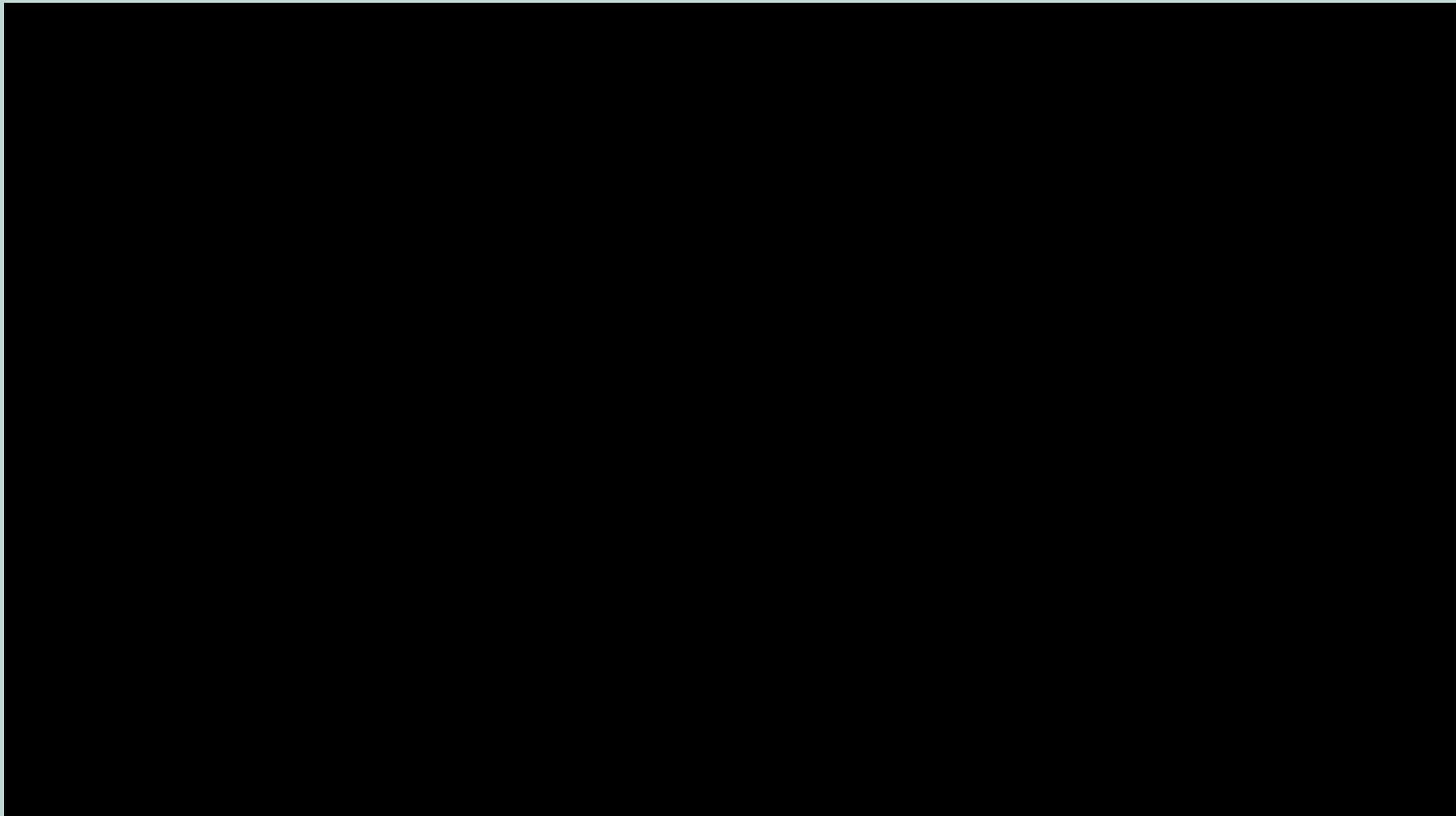
- Height & FAR
- Parking Management
- Streamlined Process



Process

- Level 1 – Ministerial
- Level 2 – Discretionary
- Level 3 - Amendment





THANK YOU

Martin Reeder

Principal Planner, City of National City

Email: mreeder@nationalcityca.gov

Phone: (619) 336-4313



**HOUSING & ECONOMIC DEVELOPMENT
TOGETHER WE CAN PROGRAMS:**

**Adopt-a-Place;
Activate the Right of Way;
Signage & Façade Improvement Program**



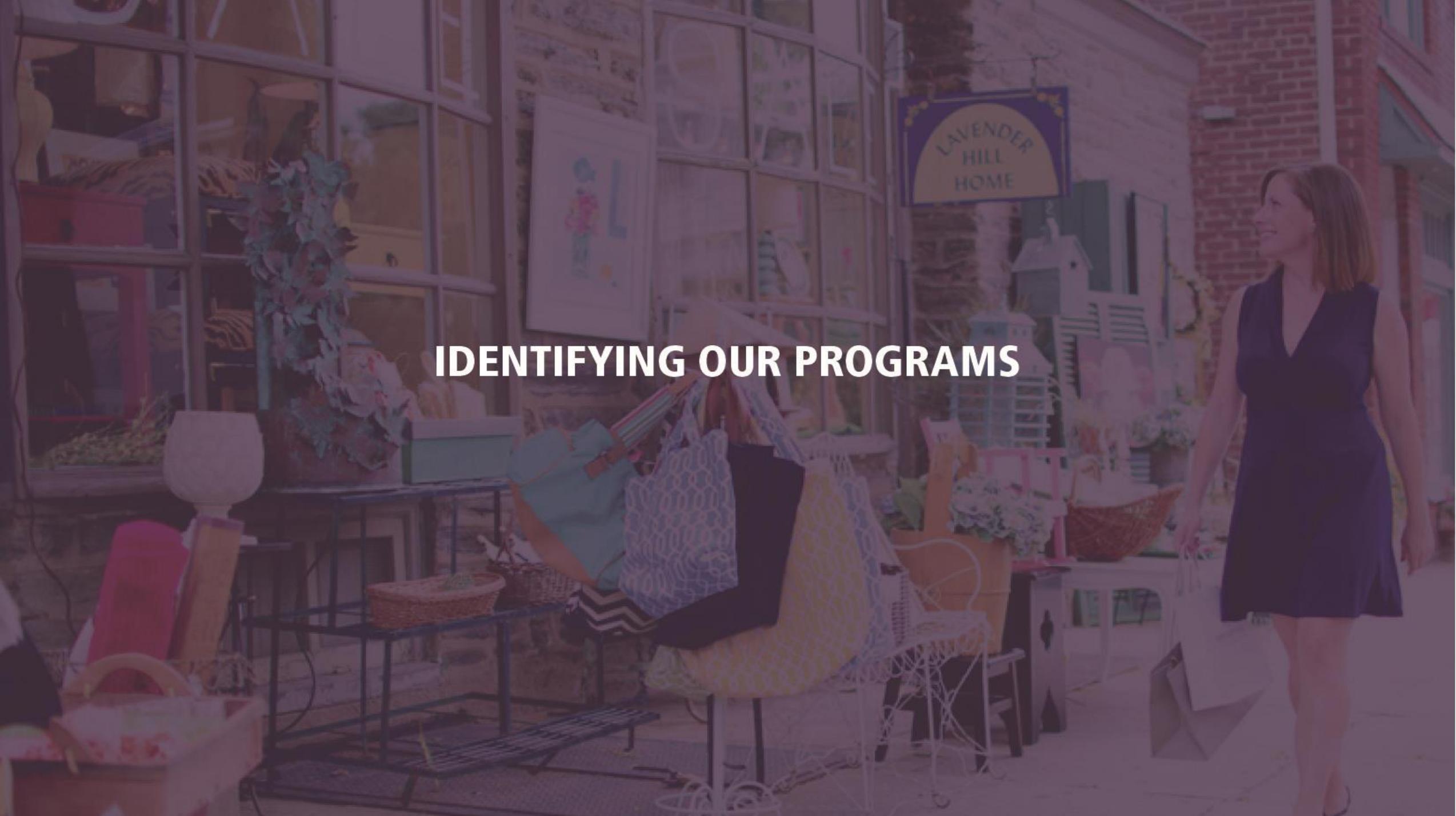
**CREATING A
CLEANER, HEALTHIER, SAFER...**

An aerial photograph of a city street intersection, overlaid with a semi-transparent purple filter. In the center of the intersection is a circular monument with a small structure on top, surrounded by palm trees. The streets are lined with buildings, trees, and parking lots. The overall scene depicts a well-developed urban area.

**MORE ECONOMICALLY VIBRANT
AND BEAUTIFUL COMMUNITY...**



FOR US ALL.

A woman with shoulder-length blonde hair, wearing a dark blue sleeveless dress, is walking from right to left on a sidewalk. She is carrying a white paper shopping bag in her right hand. The background is a storefront for 'Lavender Hill Home', which has a large display of home goods including wicker baskets, a white metal chair, a wicker table, and various decorative items. A sign above the entrance reads 'LAVENDER HILL HOME'. The entire image has a semi-transparent purple overlay.

IDENTIFYING OUR PROGRAMS

COMMUNITY NEED:
BEAUTIFICATION & BUSINESS INCENTIVES

COMMITMENT:
Success means bottom-up
and top-down effort

**ADOPT
-A-
PLACE**

**Neighborhood
Beautification
Program**



**SF
IP**

**Signage & Facade
Improvement Program**



**ACTIVATE THE
RIGHT OF WAY**



**ADOPT
-A-
PLACE**

Those who reside and work in the City of National City desire an environment that is clean, safe and attractive. Through the Adopt-a-Place Program individuals and organizations in the City of National City can take an active role that will help and contribute to the beautification of parks, streets, gateways and public spaces. The program mission is to increase awareness of our many public spaces & parks, encourage & recognize volunteer contributions and build community pride.

TOGETHER
**WE
CAN!**

General Criteria

Adopt-A-Place Program

1. Identify an area no less than 1/2 a mile long from the “Preferred Areas” list or suggest your own area to adopt
2. Organize quarterly cleanups
3. Meet with City staff to check out/in cleaning supplies and a quick cleanup workshop
4. Receive an Adopt-a-Place sign or banner after your first clean up. Your recognition signage will be publicly displayed for up to one year.



Groups work directly with the Public Works and Housing and Economic Development Departments



Neighborhood Beautification Program

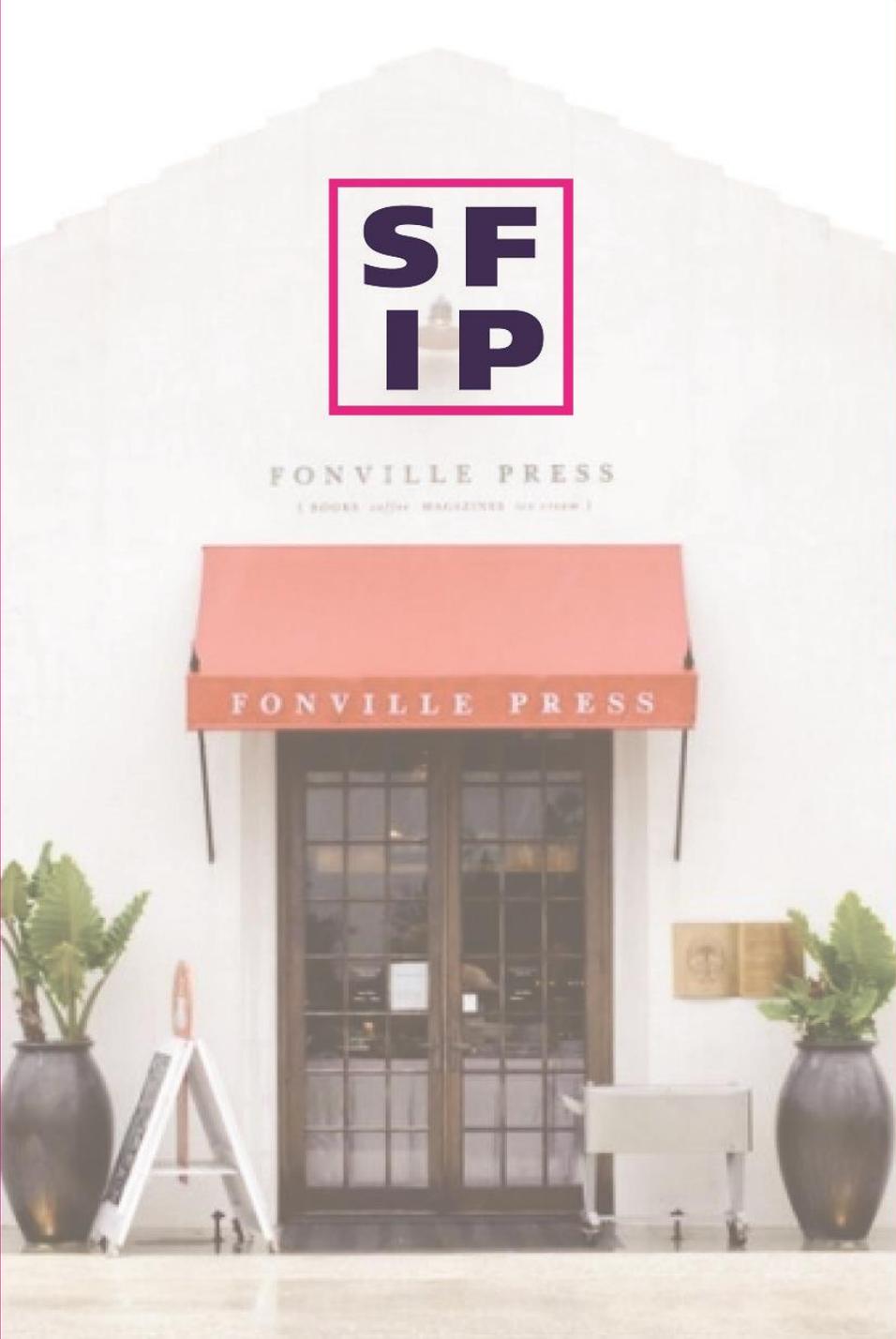


**ADOPT
-A-
PLACE**

Program Recognition

Street Banners, Pole Signs, Window Decals, Bumper Stickers





The purpose of the Signage and Façade Improvement Program (SFIP) is to assist businesses in signage compliance and improve the appearance of existing businesses. The SFIP mission is to stimulate revitalization and private sector capital investment by proactively addressing deteriorating property conditions and encouraging improvements which increase our City's overall economic vitality.

**TOGETHER
WE
CAN!**



Eligible Improvements for Signage & Façade Improvement Program

1. Exterior Signs
2. Awnings and canopies
3. Exterior painting, cleaning, façade repair
4. Plants and landscaping
5. Doors and windows
6. Façade and display window lighting
7. Fascia, tile, trim, metal work and other decorative elements
8. Demolition of obsolete structures
9. Addition of a patio or outdoor space



Program Incentives for Signage & Façade Improvement Program

Property Type	Minimum Total Project Cost	Applicant Match Requirement	Maximum Reimbursement
Standard Incentive	\$1,000.	≥ 50%	\$10,000.
Multi-Tenant Property Owner Incentive	\$2,500.	≥ 50%	\$15,000.

Standard Incentive: All projects for a single small business may be considered for the standard incentive and may be awarded one-half of the eligible costs of the project up to a maximum of \$10,000.

Multi-Tenant Property Owner Incentive: A National City property owner leasing to two or more street level and street-facing small business tenants may be awarded one-half of the eligible construction costs up to a maximum of \$15,000. Each qualified tenant must have their own street facing entrance and be visible from the public right of way.



to assist businesses in signage compliance and improve the appearance of existing businesses and their overall vitality.



The program reimburses owners of commercial buildings and businesses up to 50% of the total cost of eligible improvements.



Signage & Facade Improvement Program



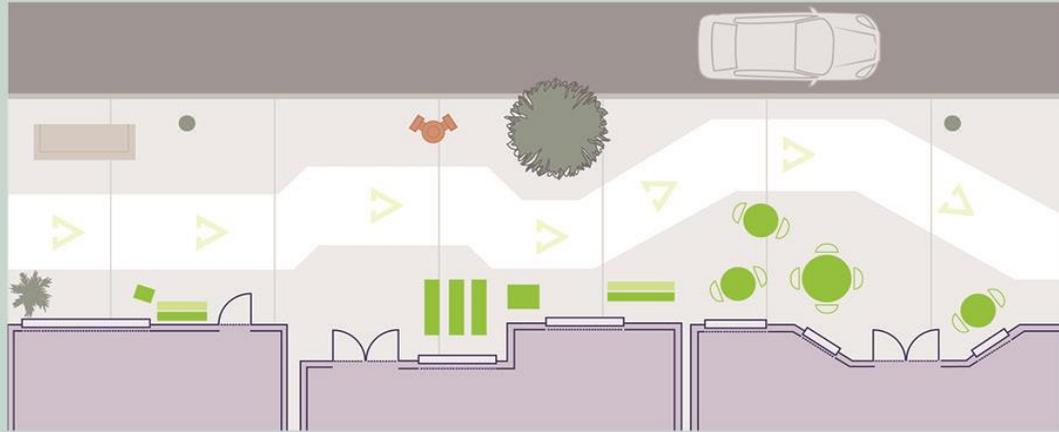


The purpose of the Activate the Public Right of Way (A.R.O.W.) is to beautify, activate and promote our City by working with the business community to enhance portions of the public right-of-way (PROW). The Program will create spaces that cultivate community and culture, increase property values for residents of our City and spur economic growth and income to local merchants by encouraging pedestrian traffic. The program's two areas of focus are outdoor display areas and outdoor recreational areas.

TOGETHER
**WE
CAN!**



Activate the Right of Way Programs Areas of Focus



Outdoor Display Standards: Only those businesses fronting on the PROW and located on the first floor may participate in

this Program. Community Business Organizations may adopt a place in the PROW that has been identified by the City as a desired location for enhancement. Enhancements may be placed only in the PROW directly in front of the Business's storefront or in one of the city's identified areas of enhancement. Enhancements that do not comply with the General Requirements, Standards, and Conditions of this Program are not allowed.



Activate the Right of Way Programs Areas of Focus



Outdoor Dining Area Standards:

Only those restaurants fronting on the PROW and located on the first floor may participate in this Program.

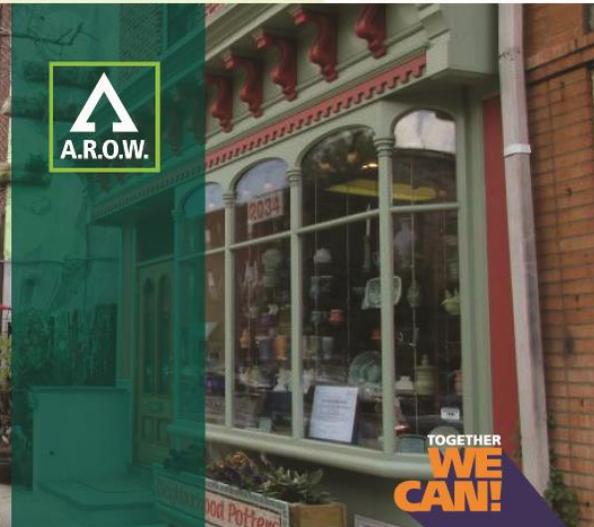
Community Business Organizations may adopt a place in the PROW that has been identified by the City as a desired location for Enhancements. Enhancements that do not comply with the General Requirements, Standards, and Conditions of this Program are not allowed.



Creating spaces that cultivate community and culture, increase property values for residents of the City of National City and spur economic growth and income to local merchants by encouraging greater pedestrian traffic.



ACTIVATE THE RIGHT OF WAY



THANK YOU

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Q&A