

City of Santa Cruz

Retail Market Analysis

Downtown, East, Waterfront & West Districts



Prepared for:
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6 September 2011



Purpose and Limits of Study

Gibbs Planning Group (GPG) has been retained as an independent third party consultant by the Redevelopment Agency of the City of Santa Cruz to assess the viability of additional retail sales for existing businesses and for the development of new retailers of the defined downtown, east, west and waterfront areas. These findings are intended to give the agency an objective insight into the types and amounts of retail market share that it could potentially capture and to assist in future policy and planning decisions.

These findings relate to the overall retail market defined by the City and the four identified sub-areas of that market. This study and its conclusions are not intended to be sufficient to assess the suitability of any specific site within those areas to a specific use, a specific retailer or a specific retail concept. Further study and analysis should be undertaken regarding individual projects.

The findings of this study represent GPG's best estimates for the amounts and types of retail tenants that should be supportable at the subject study areas through 2016. While this study includes exemplar retailers by name it does not assume that any particular retailer or retail concept is necessary to achieve projections contained in this study. Every reasonable effort has been made to ensure that the data contained in this study reflect the most accurate and timely information possible and are believed to be reliable. This study is based on estimates, assumptions, and other information developed by GPG's independent research effort, general knowledge of the industry, and consultations with the client and its representatives.

No responsibility is assumed for inaccuracies in reporting by the client, its agent and representatives, or in any other data source used in preparing or presenting this study. This report is based on information that was current as of April 20, 2011.

This study may contain prospective financial information, estimates, or opinions that represent GPG's view of reasonable expectations at a particular time, but such information, estimates, or opinions are not offered as predictions or assurances that a particular level of income or profit will be achieved, that particular events will occur, or that a particular price will be offered or accepted. Actual results achieved during the period covered by our prospective financial analysis may vary from those described in our report, and the variations may be material. Therefore, no warranty or representation is made by GPG that any of the projected values or results contained in this study will be achieved.

GPG does not recommend that any or all of the supportable retail space or tenant brands be implemented or sought out by the Redevelopment Agency.

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Santa Cruz Retail Market Study

Santa Cruz County, California
6 September 2011



Figure 1: Pacific Avenue's historic shopping district has a balanced collection of retailers and restaurants clustered along an attractive streetscape (view looking south).

EXECUTIVE SUMMARY

This study finds that the city of Santa Cruz's downtown, east, west and wharf-waterfront districts - combined - has a pent up market potential to support 582,500 square feet of additional retail and restaurant businesses by 2016. If fully implemented, this new commercial development could potentially generate up to \$237.6 million in additional annual sales. This growth can be gained through the expansion of existing businesses and/or with the development of 75 to 100 new retailers and restaurants such as Apple Computer, Capital Grill, Dave & Buster's, ESPN Zone, Forever 21, H&M, Lowe's, Nordstrom Rack and REI Sporting Goods. The region will also continue to support local and regional retailers and restaurants that offer innovative merchandise, good value and careful service.

The greater Santa Cruz market contains a diverse consumer base. The city's primary trade area includes 76,000 people, including 17,000 university students and 33,600 downtown daytime workers. Its tertiary trade area includes over 160,500 people and 64,700 households earning a \$74,600 median household income. Approximately one-third of the household base reports incomes of \$100,000 or higher. Although the city is located within only 60 miles of the major shopping destinations of San Francisco and San Jose, much of its population is relatively isolated due to limited transportation networks and restrictive geographical conditions.

The majority (58 percent) of the Santa Cruz market's population - the residents of the primary trade area (33,500) - is classified as Urban Chic. This group tends to be well educated professionals that stay physically fit, own Apple computers, drink premium wines and Starbucks coffee, take advantage of city life, visit museums and shop at Nordstrom, Ann Taylor and Macy's. It's also likely that they frequently shop outside of the region or on the internet.

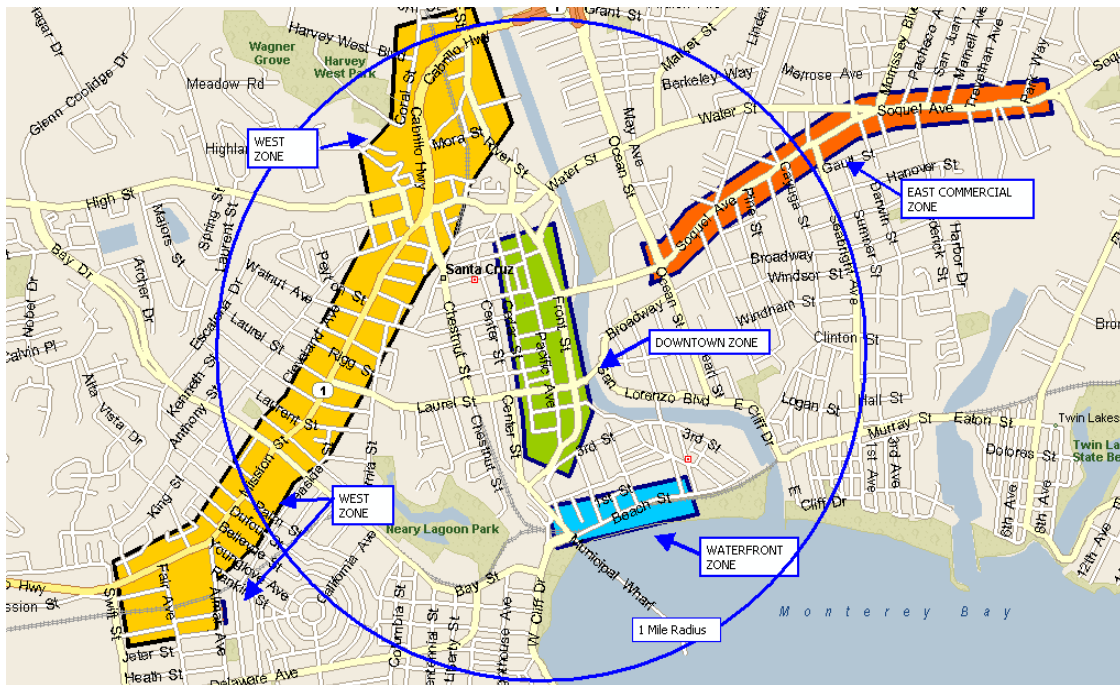


Figure 2: Location map of the four identified retail study areas in Santa Cruz, California.

Although located within a two mile radius, the identified four commercial zones individually appeal to and meet different consumer needs. Their combined length extends five miles and their boundaries are outlined below:

- Downtown:** Pacific Avenue & Front Street: Water to Spruce Streets
- East:** Soquel Drive: Ocean Street to Capitola Road
- West:** Cabrillo Highway & Mission Streets: River to Swift Streets
- Waterfront:** River Street: Pacific Avenue to 3rd Street

A summary of the additional supportable retail¹ for each of the study areas can be found in Figure 3 below:

Figure 3: Additional Supportable Retail Summary - Santa Cruz Retail Study Areas

Zone	2016			
	Total New Supportable Retail *	Estimated Additional Annual Gross Sales **	Est. Sales per Square Foot *	Number of New Stores
Downtown	91,500 sf	\$43,865,000	\$479 sf	25-30
East Area	60,000 sf	\$20,250,000	\$338 sf	15-20
West Area	344,000 sf	\$135,657,500	\$413 sf	30-40
Wharf-Waterfront	87,000 sf	\$37,825,000	\$435 sf	5-10
Totals	582,500 sf	\$237,597,500	N/A	75-100

Downtown Zone

¹ "Supportable retail" is defined as that quantity of retail in a defined area that can produce sufficient sales revenue to cover market-rate expenses for store operations including managerial labor and earn a market rate of return on their investment. "Additional supportable retail" may include new retail outlets, improvement in the performance of existing retail outlets, or a combination of these means.

Clustered along Pacific Avenue and Front Street, the Downtown Zone represents the region's historic shopping district and is presently an active urban center with over 200 stores and restaurants. The downtown has an unusually broad selection of apparel, grocery stores, restaurants and entertainment venues operated by a balance of local, regional and national owners. Although no longer the region's dominant shopping destination, the 0.75 mile long corridor has a significant opportunity to increase market share by broadening its appeal to more diverse demographic profiles including empty nesters, single professionals, young families, seniors and the university community.

By 2016, the downtown area can support up to 91,500 square feet of new retail and restaurants, including a 25,000-square-foot junior department store such as Forever 21, H&M or Nordstrom Rack, six to ten new women's apparel stores, a computer store and three to five new casual restaurants. The pent up demand could equate the opening of 25 to 30 new stores, and/or the expansion of existing businesses generating over \$43.8 million in annual sales. Pacific Avenue's numerous updated or new commercial buildings, combined with the downtown's parking decks and attractive streetscape, are conducive for many leading retailers. However, the downtown suffers from a myriad of policy, urban planning, and other challenges that are likely responsible for limiting its market share and overall economic performance.

Simply adding a department store such as Target would generate an across-the-board sales gain for existing downtown retailers and restaurants of 20 percent or higher.



Figure 4: Beach Street looking east towards the Giant Dipper roller coaster.

Waterfront Zone

Home of Santa Cruz's world famous beach, with a large municipal wharf as well as a popular amusement park, the Waterfront area is a major regional, if not national attraction. It has seasonal appeal as the principal attractor of the more than three million people reported by tourism studies to visit the City of Santa Cruz Beach Area annually. However, except for a handful of restaurants, the area's multiple souvenir shops and moderate motels are oriented towards the day or short term value-seeking tourist. Surprisingly, linkages between the waterfront and the adjacent downtown have been restricted with one-way streets and limited signage, resulting in little economic spillover for Pacific Avenue businesses and significantly lower per-visitor spending than would otherwise be expected.

GPG finds that most of Beach Street's businesses are not meeting industry standards and have an opportunity to expand their appeal and market share by improving their storefronts, interiors, maintenance and visual merchandising. This study estimates that by 2016, the waterfront area will be able to support 87,000 square feet of additional entertainment, retail

and restaurant development generating an estimated \$37.8 million in annual sales. Entertainment venues such as Dave & Buster's and the ESPN Zone are plausible for the Beach Street area.²

East Commercial Zone

Grouped along the 1.5 mile Soquel Highway, the East Zone is one of the region's most eclectic and unconventional destinations. Many of the businesses are housed in unique post-war buildings that have been creatively adapted for home furnishings, sporting goods, restaurants and groceries. The area has an especially wide assortment of supermarkets including Whole Foods Market, Shopper's Corner (family owned), Staff of Life, and Safeway. Additionally, there is a growing home accessory/furniture component and numerous local restaurants. Its unique urbanism and the densely populated surrounding neighborhoods make the area a very desirable location for numerous retailers.

By 2016, the East Commercial area will be able to support up to 60,000 square feet of additional retail and restaurant development including four to six apparel stores, five to seven restaurants, a small drug store and 26,000 square feet of home furnishings.² This additional development could potentially generate up to \$20.2 million in annual sales. The East area should appeal to a broad cross section of businesses including Aardvark's Odd Ark, Chipotle Mexican Grill, Dollar Store, Jeremy's Clothing Outlet, Tuesday Morning and Urban One Recycling.

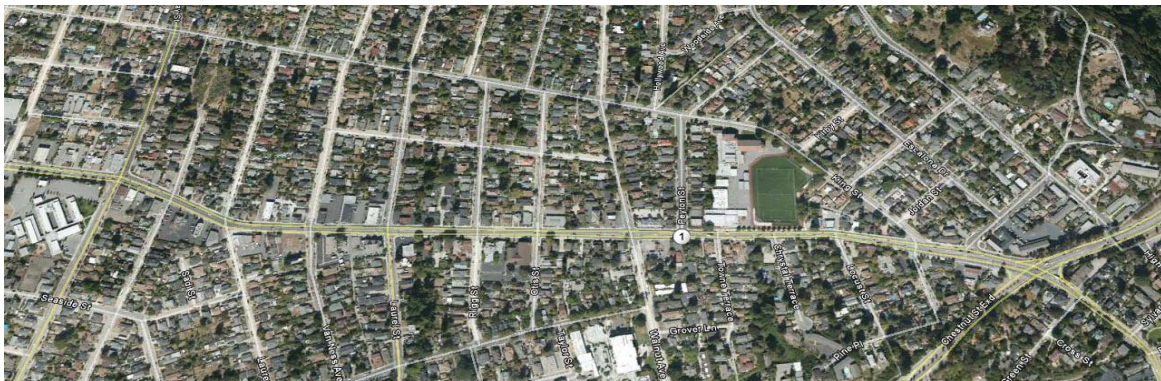


Figure 5: Mission Street looking north. The West corridor has a suburban character and is lined with numerous large shopping centers.

West Commercial Zone

The West area includes two miles of the Cabrillo Highway-Mission Street corridor. The area provides the surrounding neighborhoods as well as much of the region with needed neighborhood and community level goods and services. The zone is anchored with multiple supermarkets, shopping centers, the Tannery Arts Center, Costco and the Swift Street Courtyard (Kelley's Bakery & an area of wineries and tasting rooms including the Pelican Winery, Pious Winery, Equinox Champagne Cellar, Trout Gulch Vineyards, Hillcrest Terrace Winery, Silver Mountain Vineyards, VINO Tabi, Sones Cellars, Santa Cruz Mountain Vineyard & Quinta Cruz, Odonata Wines, MJA Vineyards, Storrs Winery and Vineyards).

The area's excellent regional and local access offers a good location for the development of a wide range of local, regional and national neighborhood and community retailers, to attract

² See Footnote 1, "Additional Supportable Retail" regarding the combination of new outlets and improved performance of existing outlets.

those that are currently leaving the Santa Cruz area to shop either north in the Los Gatos/San Jose area or to the south in Capitola and Watsonville.

This study finds that the West commercial area will support up to 171,000 square feet of additional (new) retail development by 2016, potentially generating over \$70 million in additional annual sales revenue. High volume retailers and restaurants including Bravo, Capital Grill, Ethan Allen, Lowe's Home Improvement, Old Navy, Target, and Which Wich sandwich shop, as well as regional and local businesses, are plausible for the west corridor.³

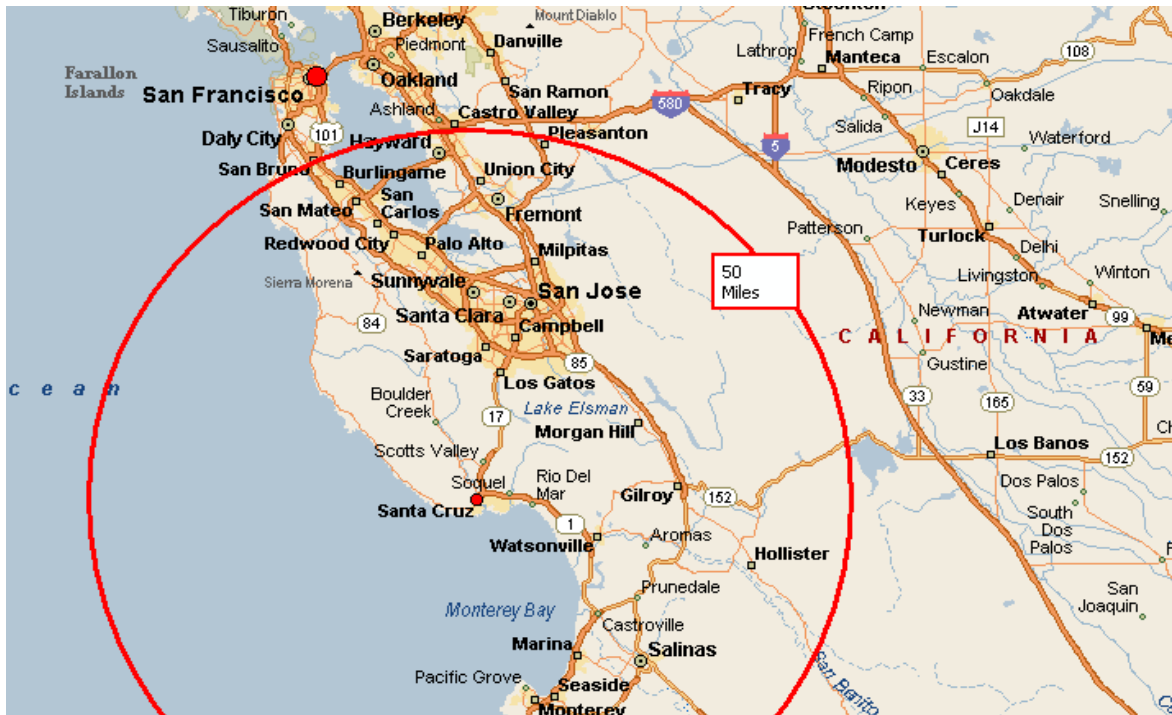


Figure 6: Santa Cruz is located within 60 miles of San Francisco and is only 25 miles from San Jose.

Rationale

This study is based on the following:

- Stable population and households.
- Limited close-in population base.
- Good Income and educational levels.
- Strong tapestry lifestyle demographics.
- Good daytime population base.
- Good local and regional access.
- Strong daytime worker, university student, and tourist spending potential.
- Limited competition and general undersupply of retailers.
- Effective local business assistance and advocacy including: the Santa Cruz Redevelopment Agency, the Santa Cruz Area Chamber of Commerce, the Downtown Association (a Business Improvement District-funded marketing group), the Downtown Management Corporation (a Property-Based Improvement District that provides downtown hosts and security) as well as targeted business organizations such as The

³ See Footnote 1, "Additional Supportable Retail" regarding the combination of new outlets and improved performance of existing outlets.

INTRODUCTION

Background

Gibbs Planning Group, Inc. (GPG) has been retained as an independent third party consultant by the Redevelopment Agency of the City of Santa Cruz to assess the viability of expanding existing businesses or the development of new retail for the following areas:

Downtown: Pacific Avenue & Front Street: Water to Spruce Streets
East: Cabrillo Highway & Mission Streets: River and Swift Streets
West: Soquel Drive: Ocean Street to Capitola Road
Waterfront: River Street: Pacific Avenue to 3rd Street

The following issues were addressed by GPG in this study:

- What is the existing and planned retail in the greater Santa Cruz, California market?
- What is the primary trade area that would be served by retail in the identified study areas?
- What are the current and projected trade area population and demographic characteristics for each retail zone? What are the trade area psychographics (lifestyles)?
- What is the current and projected growth for retail expenditures from 2011 to 2016 for each zone and where is any retail spending occurring?
- What additional components (i.e.: daytime population base, tourists, and college students) are available to help support retail in the districts?
- What type of retail is supportable and should be attracted to each of the Santa Cruz retail zones? What are their anticipated sales volumes?

Definitions

This study utilizes the shopping centers typologies defined by the International Council of Shopping Centers (ICSC) as follows:

- **Convenience Centers:** Convenience centers are 30,000 square feet or less, unanchored, and generally will service a trade area of up to one mile. These centers include: banking, carryout foods, florists, mail centers, small restaurants, small food markets, and professional services such as real estate and financial consulting. The centers typically include six to eight businesses.
- **Neighborhood Centers:** Neighborhood centers are anchored with a full-sized supermarket and typically range from 60,000 to 100, 000 square feet. They service a trade area of two to three miles and can include apparel, banks, carryout food, hardware, mail centers, restaurants, sporting goods, and professional services such as financial consulting and real estate.

-
- **Community Centers:** Community centers typically range from 150,000 to 300,000 square feet and are almost always anchored with a full-sized department store. They also include junior anchor retailers selling books, crafts, shoes, and sporting goods. Community centers often include large home improvement stores and medium-sized discount apparel stores. Their service area is typically five to seven miles in suburban locations.
 - **Lifestyle Centers:** Lifestyle centers average 150,000 to 200,000 square feet and feature popular apparel, book, and home furnishing stores, as well as cinemas and a wide selection of themed restaurants. The centers are frequently planned as walkable areas with main streets. Recently, lifestyle centers have included large anchors such as department stores, public libraries, and supermarkets. These centers typically have a trade area of four to six miles when developed in suburban settings. Lifestyle centers that include civic, employment, and residential buildings along with the retail land use are defined as 'town centers.'
 - **Regional Centers:** Regional centers average trade areas of eight to 12 miles and are anchored with multiple department stores. The centers can range from 800,000 to 1,500,000 square feet, and often include cinemas along with 200,000 square feet of national brand fashion.

This study also utilizes the trade area typologies as defined by MapInfo and listed below:

- **Primary Trade Area:** The primary trade area (PTA) refers to that area from which the retail offerings at the site will draw approximately 70 to 75 percent of their business, and includes a population base that will make the area a primary shopping destination by typically shopping there on a weekly basis.
- **Secondary Trade Area:** The secondary trade area (STA) represents that area from which the site will draw an additional 10 to 15 percent of its business. Those residents who live in the STA, but not within the PTA, will shop the Santa Cruz retail zones frequently (one to two times a month), but the area will not be their primary shopping destination.
- **Tertiary Trade Area:** The tertiary trade area accounts for additional retail expenditures that the area derives from more distant communities that may not shop on a regular basis in Santa Cruz, but will consistently account for some percentage of sales.

Methodology

To address the above issues, GPG conducted a detailed evaluation of the retail in the Santa Cruz area during October 2010 and the weeks of March 21 and April 22, 2011. The evaluation looked at most major existing and planned shopping centers, as well as retail concentrations in and around the defined trade area. GPG thoroughly drove the market during this evaluation, visiting and evaluating most major existing and planned retail concentrations in the area.

The area was visited during the daytime as well as the evening in order to gain a qualitative understanding of the traffic and retail gravitational patterns throughout the study area. A trade area that would serve retail in the proposed commercial zones was then defined based

on the field evaluation and the retail gravitation in the market, as well as our experience defining trade areas throughout the United States. Population, demographic, and lifestyle characteristics of the trade area residents were collected through the use of U.S. Census Tracts from national sources, and updated based on information gathered from various local sources.



Figure 7: The Rio Theater is one of numerous post war buildings that contribute to the unique character of the East area.

Additionally, GPG identified the other sources of sales for the district, including the daytime population base and college students that would not be included in the Census data but would benefit retail at all the identified retail zones. Expenditure potentials for these groups were calculated based on studies conducted and published by the ICSC (International Council of Shopping Centers).

GPG computed current and projected estimates of retail sales using our proprietary models of expenditure potential, the U.S. Census of Retail Trade, sales tax information, and trade area population levels. Using average sales per square foot for the identified retail categories, we then conducted a retail void analysis of the market.

GPG also referenced the following reports regarding visitors and their expenditures:

- *Santa Cruz County Visitor Profile* - Presented by Lauren Schlau Consulting March 10, 2010.
- *2009 Visitor Market Profile & Conversion Study* - prepared by Campbell Rinker.

Finally, based on the population and demographic characteristics of the trade area, existing and known planned retail competition, the results of our retail void analysis, and traffic and retail gravitational patterns, GPG developed this assessment of the Santa Cruz study area and forecast sales for the supportable retail.

Retailers recommended are those known to be looking for new locations and expanding. The report's projections and conclusions have been adjusted to reflect changes in consumer spending behaviors related to the 2008-2010 "Great Recession," including increased savings

rates, changes in purchasing preferences, and store preferences and consumer trends with regards to an increased purchasing of goods and services through the Internet.

Assumptions

For the purposes of this study, GPG has assumed the following:

1. The economic conditions of the greater Santa Cruz, California market will remain stable and grow as projected through 2016.
2. The retail will have adequate visibility, ingress/egress, and parking⁴ for the proposed uses. Additionally, each zone will be professionally marketed, managed, leased and promoted to meet or exceed industry standards⁵ as a shopping destination.
3. The identified zones will continue to be managed as a walkable district, based on the best practices of The American Planning Association, The Congress for the New Urbanism, The International Council of Shopping Centers, and The Urban Land Institute.
4. Expenditure potentials for the student and daytime population bases are comparable to national averages as reported by the ICSC (International Council of Shopping Centers).
5. Parking for the area is assumed to meet or exceed industry standards for the proposed uses, with easy access to the retailers. Additionally, it is assumed that the present parking fee structure will continue at its current rates. It is also assumed that all existing metered parking will continue as currently programmed with the possible exception of reducing fines for or forgiving first violations.
6. Linkages between the waterfront and the downtown area will be improved, especially signage, marketing brochures and the implementation of the planned rubber-tire trolley system.
7. The downtown's one-way street network as it interacts with Pacific Avenue will be redesigned to accommodate two-way traffic. Maintenance of the status quo one-way street system would result in a significant reduction of the 91,500 additional supportable square feet of retail

Limits of Study

The findings of this study represent GPG's best estimates for the amounts and types of retail tenants that should be supportable at the subject study areas through 2016. Every reasonable effort has been made to ensure that the data contained in this study reflect the most accurate and timely information possible and are believed to be reliable. This study is based on estimates, assumptions, and other information developed by GPG's independent research effort, general knowledge of the industry, and consultations with the client and its representatives.

No responsibility is assumed for inaccuracies in reporting by the client, its agent, and representatives, or in any other data source used in preparing or presenting this study.

⁴ Comments regarding parking are contained in the sections of this report related to each study sub-area.

⁵ Marketing benchmarks include *Dollars and Sense of Shopping Centers*.

This report is based on information that was current as of April 20, 2011.

This study may contain prospective financial information, estimates, or opinions that represent GPG's view of reasonable expectations at a particular time, but such information, estimates, or opinions are not offered as predictions or assurances that a particular level of income or profit will be achieved, that particular events will occur, or that a particular price will be offered or accepted. Actual results achieved during the period covered by our prospective financial analysis may vary from those described in our report, and the variations may be material. Therefore, no warranty or representation is made by GPG that any of the projected values or results contained in this study will be achieved.

This study and its conclusions are not intended to be sufficient to assess the suitability of any specific site within the study areas to a specific use, a specific retailer or a specific retail concept.



Figure 8: The downtown-Pacific Avenue area has a balance of local, regional and national retailers, and includes over 200 businesses.

This study should not be the sole basis for programming, planning, designing, financing, or development of a commercial center. GPG is an independent third party consultant and therefore does not necessarily endorse or recommend that any of the supportable businesses be sought out or recruited in Santa Cruz by the public or private sector.

GPG does not recommend that any or all of the supportable retail space or tenant brands be implemented or sought out by the Redevelopment Agency.

Influences of the 2007 Recession

The great recession impacted the economy in ways that can be described as long-term and structural. Its overall impact has also been heightened by the current demographic make-up of the United States and more specifically the aging of 76 million baby boomers. The report's projections and conclusions have been adjusted to reflect changes in consumer spending behaviors resulting from the 2007 economic collapse. The recession generated upward pressure on savings rates, influenced purchasing and store preferences and impacted trends in the use the internet to purchase goods and services.

During any economic downturn, the savings rate will increase and by definition will reduce consumer spending. Most recessions since the 1929 Great Depression have witnessed high

unemployment, but the 2007 recession not only increased unemployment, but also saw underemployment, hidden unemployment and other forms of labor underutilization, further increasing the savings rate-depressing consumer spending.

In 2005-2007, the American household saving rate was at historically low levels in the range of one to two percent. According to the U.S. Bureau of Economic Analysis, the savings rate through the fourth quarter of 2010 was 5.6 percent. Although we do expect the savings rate to go down as the economy improves, we expect it to stay above historical levels. We attribute this to the baby boomer generation preparing for retirement and in turn reducing their overall level of spending. This study has factored the increased savings rate into our projections and conclusions.

The downturn has also impacted purchasing preferences of consumers, many of whom have shifted their dollars from discretionary areas to more essential areas, such as health care. Additionally, there is a greater emphasis on services, including food and restaurants. Households and individuals place a greater emphasis on services such as personal care, dining out and entertainment. In some cases this represents a shift in dollars from products to services. GPG has factored this trend into our projections and conclusions.

The recession has also made many consumers more cautious, strongly evaluating and planning how and where they make their purchases. Except for many super luxury brands, retailers are witnessing a steady shift to value. Consumers seem to be more focused on proven brands and core product features instead of “bells and whistles.” Post- recession shoppers want the best of everything - a fair price and great quality - and we expect this trend to continue even as the economy improves.

Many households are now “trading down” and shifting their spending to less expensive products. While the figures vary widely, at the height of the recession nearly 50 percent of consumers reported that they were trading down and spending less money on the same products as they did in the past. While the numbers today for consumers who are reporting they are trading down are now in the 20 to 33 percent range, we expect the trading down trend to continue. “Guilt-free shopping” is the new luxury.

Based on their new purchasing preferences, most demographic groups have slightly changed the stores where they spend their money. Consumers have migrated to familiar stores that offer value for comparable products. During the recession if a customer was deciding between two stores to buy similar products, the consumer tended to gravitate toward the store that offered the most perceived value. For example, many consumers have increased their shopping at Target Department Stores over other discount stores. Many households, especially higher income and educated households perceive Target to be a better solution to the value equation - better quality at lower prices, and discount stores in general such as Wal-Mart and the Dollar Store continue to experience market share gains.

It is difficult to assess the 2007 recession’s impact on internet retail sales. Nationally, retail sales in the fourth quarter of 2010 were approximately \$51.4 billion (up 14 percent). This increase outpaced the overall increases in retail sales; however, the internet makes up only 3.6 percent of all retail sales based on the most recent data available. This continues a trend of internet retail sales increasing by double-digit amounts over the last decade making it difficult to ascertain how much if any of the 2010 increase should be attributed to the recession.

However, we believe that the recession has forced consumers to be more cautious in their spending. We are seeing consumers spend more time on planning purchases and doing

more research prior to making a purchase. We surmise that many consumers today are relying on the internet to do their research. We expect this trend to continue for the foreseeable future. The recession also pushed more consumers to the internet to do their shopping out of convenience and necessity.

This study has assumed continuation of growth trends in internet retail sales in making projections of additional supportable retail and in its analysis of retail categories.



Figure 9: Joe's Pizza and Subs, found on the campus of the University of California-Santa Cruz. The 16,500 student body and 500 faculty members have a considerable influence on the region's commercial market.

Another trend produced from the great recession is customers gravitating toward stores they know and trust. As the consumer looked to stretch her dollar, she opted to go to stores that offered her a good overall experience in the past. While fending off challenges during the recession, many households simply didn't have the time or confidence to sample or try new stores. Many household income producers (often both earners) begin working longer hours and second jobs as a way to create some income security. In turn they have less leisure time to sample or experiment with new stores. Because the recession was so severe and impacted wealth so negatively, many retailers expect the trend of consumers gravitating toward stores they know to continue as consumers will continue to work longer hours and in some cases postpone retirement to create some wealth.

In summary, the 2007 recession has had lasting impacts and created structural changes to how consumers spend money. It has increased savings rates reducing the amount of money consumers spend on retail goods and services. This trend is expected to continue, led by the baby boomer generation. The recession has influenced the type of goods we buy and has increased the importance of perceived value. The internet is now used more than ever to search for value, increase shopping "efficiency" and to facilitate the purchase of goods and services.

www.census.gov;

"Growth in Internet Sales May Impact Leasing & Development, But Others See It as Another Challenge" by Murray Shor on shoppingcenterdigest.blogspot.com

"How the Recession Has Changed US Consumer Behavior" by Betsey Bohlen, Steve Carlotti, Liz Mihos from the McKinsey Quarterly 00475394 2010, Issue 1 from the ICSC Albert Sussman Library

Bureau of Labor Statistics Consumer Expenditures Survey

"Bust of the Baby Boomer Economy: 'Generation Spend' Tightens Belt" from CNBC

U.S. Bureau of Economic Analysis

Wikipedia

Newsweek

Retail Leakage Analysis

“Retail leakage analysis” calculates the difference between the amount of money residents of a defined area spend on retail goods and services and the gross revenues of the retail merchants of that area. In virtually every area, residents shop outside of their community, and non-residents shop in every community. The City of Santa Cruz has particularly large differentials; sales are lost as to a significant out-commute population, nearby regional shopping centers, but sales are gained from a large temporary-resident student population and its role as a major tourism destination.

A study area is said to have “retail leakage” when local retailers gross sales are less than the total retail expenditures by the residents of that area. Conversely, “retail surplus” means that the gross sales by a community’s retailers are greater than that area’s residents’ purchases.

Retail leakage analyses often measure not only the total retail trade but also retail segments such as Apparel, Shoes and Accessories or Food and Restaurants and sub-segments (e.g., within the Apparel, Shoes and Accessories: Women’s Apparel, Men’s Apparel, Unisex Apparel, Children’s Apparel, Shoes & Accessories.) This study provides this level of detail.

Even a retail surplus does not necessarily mean that a city or market cannot support additional retail. Many downtown shopping areas, some regional malls and some large retailers can draw from a large geographic area creating retail surplus. In fact, several Downtown Santa Cruz retailers reported large trade areas that included San Francisco and much of central California.

The greater Santa Cruz region is experiencing an unusually large amount of retail leakage notwithstanding its relative isolation, many visitors and affluent demographic makeup. Although the study area had an estimated 2010 total retail expenditure of nearly \$2.16 billion by the residents of the study area, only \$312.3 million has been captured by retailers within the city of Santa Cruz (according to sales tax records) - retail leakage of 85.5 percent. This study estimates that the region’s total expenditures will grow to \$2.91 billion by 2016, significantly increasing Santa Cruz’s retail growth potential. Some of this leakage could also be captured with hotel construction along the waterfront or in the downtown area.

While there may be a number of reasons as to why \$1.8 billion in retail dollars is leaking outside the greater Santa Cruz market or not being spent at all, GPG concludes that there are seven primary factors:

- The existing shopping districts, especially Pacific Avenue and Beach Street have numerous policy and urban planning conditions that suppress their performance, especially a confusing one-way street network, ineffective way finding signage, rampant vagrancy and panhandling and the lack of leading retail anchors.
- Insufficient retail square footage to satisfy the potential and/or the demand. More specifically, much of the leakage is due to the fact that given its size, Santa Cruz can support a considerable amount of additional shopping venues and stores than are currently available.
- Large numbers of Santa Cruz area residents that commute and work outside the Santa Cruz region.

- Competition with larger shopping areas. Small to medium sized markets frequently loose significant amounts of retail sales to nearby larger shopping areas.
- The unique and desirable characteristics and lifestyles of the Santa Cruz population, workers and visitors. For instance, the savings rate in Santa Cruz may be higher than projected by the psychodemographic profiles of some resident groups.
- Estimated but not quantifiable unreported and untaxed commercial sales transactions such as farmers markets, art fairs, online sales by local merchants and other unbooked transactions.
- The unemployment rate in Santa Cruz County was 12.3 percent in March 2011, down from a revised 14.6 percent in February 2011, and below the year-ago estimate of 15.2 percent. This compares with an unadjusted unemployment rate of 12.3 percent for California and 9.2 percent for the nation during the same period. The county's high unemployment is significantly impacted by Watsonville's 29.4 percent rate.

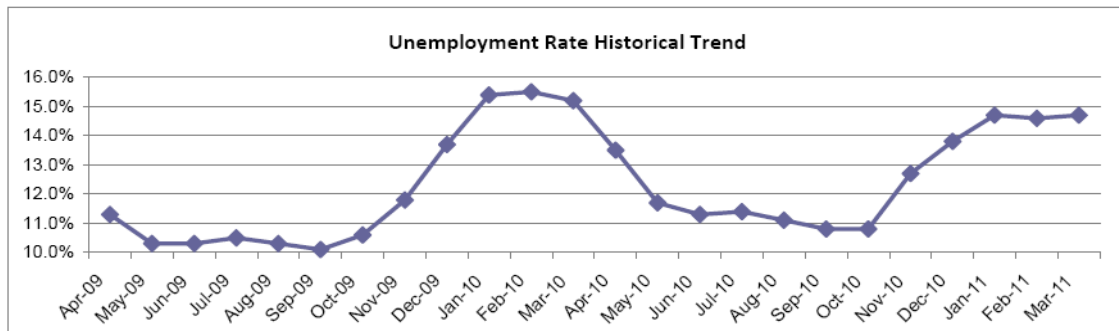


Figure 10: The Santa Cruz region has been suffering from high unemployment since the great recession.
Source: State of California Employment Development Department.

It is not just the City of Santa Cruz that is suffering significant retail leakage in Santa Cruz County. While the Capitola shopping area represents the region's dominant shopping destination, its entire combined area is only one million square feet, including the 488,000 square foot Capitola Mall. With less than 100 stores, the mall is a relatively small regional center for the industry. A new Target Department Store opening in a former Gottschalks space will help to fill a void in the region's market but still leave the County far short of its capacity. We do not anticipate Target enlarging the region's trade area or having a substantially positive impact on the region's retail leakage.

Had Target or a similar anchor opened in the Downtown Santa Cruz area, current downtown retailers would have likely seen a 20 percent or greater increase in sales. It is also likely that a second smaller Target store or a similar retailer format will seek to deploy a second unit in the western or central Santa Cruz market during the next decade.

Analysis of the Total Leakage by Retail Segment

GPG has considered sales over the internet, overall ‘psychographic mismatch’⁶ and other factors in analyzing the retail leakage, and we conclude that these factors do not account for most of the retail leakage.

Three to four percent of U.S. retail sales occur on the internet; GPG does not find any evidence that they contribute to a greater proportion of Santa Cruz’s 85.5 percent retail leakage. The psychographic-lifestyle profiles of Santa Cruz’s trade area (see below) already factor in the proclivity of Santa Cruz shoppers and others throughout the country with that profile to spend slightly less on purchases such as apparel than others with similar incomes but different profiles.

Although we cannot quantify specifically where Santa Cruz residents shop outside of Santa Cruz (e.g., through analysis of surrounding retailers’ customer geo-codes in other jurisdictions,) GPG concludes that a few ‘psychographic mismatch’ factors, primarily related to the Downtown and Beach Area shopping experience, combined with a general undersupply of stores and various policy practices, are the most likely primary contributors to the commercial spending outside of the region.

The retail leakage analysis (Figure 27) indicates a potential for a significant increase in sales in the market. Furthermore, there is potential for significant additional expenditures from tourists (Figure 23) the student population base and the daytime population base (see Figure 22). In short, these sales are not being realized as a result of:

- insufficient selection of brands
- inadequate selection of retailers
- inadequate supply of retail space
- factors related to the shopping experience, especially in Downtown and the Beach Area
- circulation and signage

All of these factors are remediable.

The following is a summary of the study area’s retail leakage by category:

Apparel, Shoes & Accessories

This study finds that the Santa Cruz market has a 2010 potential for \$351 million of retail sales of apparel, shoes & accessories and yet only \$47.4 million (13.5 percent) is being spent in 2010. This shortfall suggests that there is significant opportunity to add additional apparel-type of retailers. Based on informal discussions with industry insiders, we believe a majority of the leakage dollars of apparel, shoes & accessories are being spent in San Jose. Santana Row and Westfield Valley Fair Mall are powerful regional centers that capture a significant amount of their business from Santa Cruz.

Food & Restaurants

⁶ “Psychographics” in retail market analysis considers customer attributes such as values, attitudes interest, personality, culture, activities and lifestyles. There are several common models which segment customers into groups that share attributes. Psychographics is differentiated from demographics (age, income, family characteristics, gender) and behavioral factors (e.g., brand loyalty, holiday behaviors, and shopping habits.) “Psychographic mismatch” occurs when a retail area or a retail segment fails to fulfill the psychographic needs and interests of a defined customer segment. There are many possible mismatch factors which range from failure to supply appropriate products and services to characteristics of the shopping area or the shopping experience.

In 2010, The Santa Cruz food and restaurant market only captured \$154.2 million of the \$495.1 million expenditure potential (31.1 percent). This leakage suggests that there is significant opportunity to add additional dining venues of all kinds, including everything from local specialty cafés to premier restaurants such as the Capital Grill. However, the nearly \$341 million dining gap is also likely driven by Santa Cruz's residents' preference to shop at its many quality specialty groceries and to dine at home on tasty, healthy or gourmet meals. Capturing only 20 percent of this under-spending could equate to 25 to 40 new restaurants spread out across the four subject districts. Some of the leakage in this category may be able to be recaptured as the economy improves. Unlike the other categories, consumers will not necessarily drive great distances for restaurants.

"Other Retail" Category

GPG estimates that the region's total trade area market has a potential for nearly \$1.29 billion of sales in the "Other Retail" category and yet only \$97 million (7.5 percent) is being spent in 2010, indicating a considerable potential for increased sales. Similar to the apparel, shoes & accessories categories, a significant amount of the retail leakage is being spent in the San Jose market. However, the "Other Retail" category is broad and leakage will include expenditures during vacation and business travel.



Figure 11: Santa Cruz has numerous unique retailers that offer a mixture of goods and services that are not available in national chain stores. Shown: a specialty retailer on Pacific Avenue (Om Gallery).

Analysis of the Principal Retail Area Beneficiaries of Leakage

There are numerous beneficiaries of the retail leakage currently leaving the Santa Cruz market, including increased savings rates in response to the recession. Some households, workers and students are just not shopping and represent pent up demand. Three to five percent of the leakage sales are likely occurring on the internet or via mail order catalog sales, although we believe this to be a relatively small amount compared to the amount represented by the pent-up demand.

This study concludes that the majority of the region's under-performance is represented by dollars leaving the Santa Cruz market to be spent elsewhere. We believe some of these dollars are being spent out of state while residents are traveling, but most of the dollars leaving the market are being spent in California, in cities such as San Francisco or San Jose. While we do not have specific sales receipts for shopping centers outside of Santa Cruz, discussions with industry insiders suggest the greatest beneficiary of the retail leakage is San Jose and in particular Santana Row and Westfield Valley Fair.

While the Capitola Mall area has only 1.0 million square feet, San Jose's two primary shopping centers have a combined two million square feet. Santana Row is approximately 582,000 square feet with 110 stores and Westfield Valley Fair is nearly 1,500,000 square feet and has 270 stores. Additionally, the Santa Row area has numerous ancillary community and big box power centers.

The combined tenant lineup of Santana Row and Westfield Valley Fair is very impressive and has a wide variety of retailers and nearly all of the better retailers. In fact, one is hard-pressed to identify any quality, national retailers serving a better income customer that is not at Santana Row or Valley Fair. The only notable exception is a luxury department store such as Neiman Marcus or Bloomingdale's.

Santana Row and Westfield Valley Fair are the biggest beneficiaries of the retail leakage leaving the Santa Cruz market. The drive from Santa Cruz to Santana Row or Westfield Valley Fair is 29 miles and can be done in less than an hour. The close proximity of Santana Row and Westfield Valley Fair suggests that these centers are the primary beneficiaries of Santa Cruz's retail leakage.

Other significant beneficiaries include the Capitola Mall and the surrounding shopping area, and Los Gatos.

The Market Trade Areas

Based on GPG's field evaluation, U.S. Census Tract boundaries, gravitational models, vehicular access to each location, adjacent supporting commercial (critical mass) of the location, competing retail in the market and the current nodes' retail appeal, this study has determined that the subject commercial zones listed have the following retail shopping center equivalency appeal:

Downtown Zone: regional in orientation

-apparel, junior department store, restaurants

East Commercial Zone: neighborhood in orientation

- home furnishings, unique brands

Waterfront Zone: regional in orientation- entertainment and tourism.

Western Zone: community in orientation- home groceries, restaurants

This study identifies a primary trade area that is neighborhood in appeal, a larger secondary trade area with community appeal, and a tertiary trade area with regional appeal. The trade areas are approximately delimited by the following boundaries (note: all radius distances are "as the crow flies," NOT driving distances):

Primary Trade Area

To service the neighborhood/convenience-oriented needs of all four retail zones:

- North to Felton & Scotts Valley (six miles).
- East to 17th Avenue (two and a half miles).
- South to the Pacific Ocean/Monterey Bay (one mile).
- West to Wilder Ranch State Park (three miles).

Please refer to the following map for a visual depiction of the primary trade area:

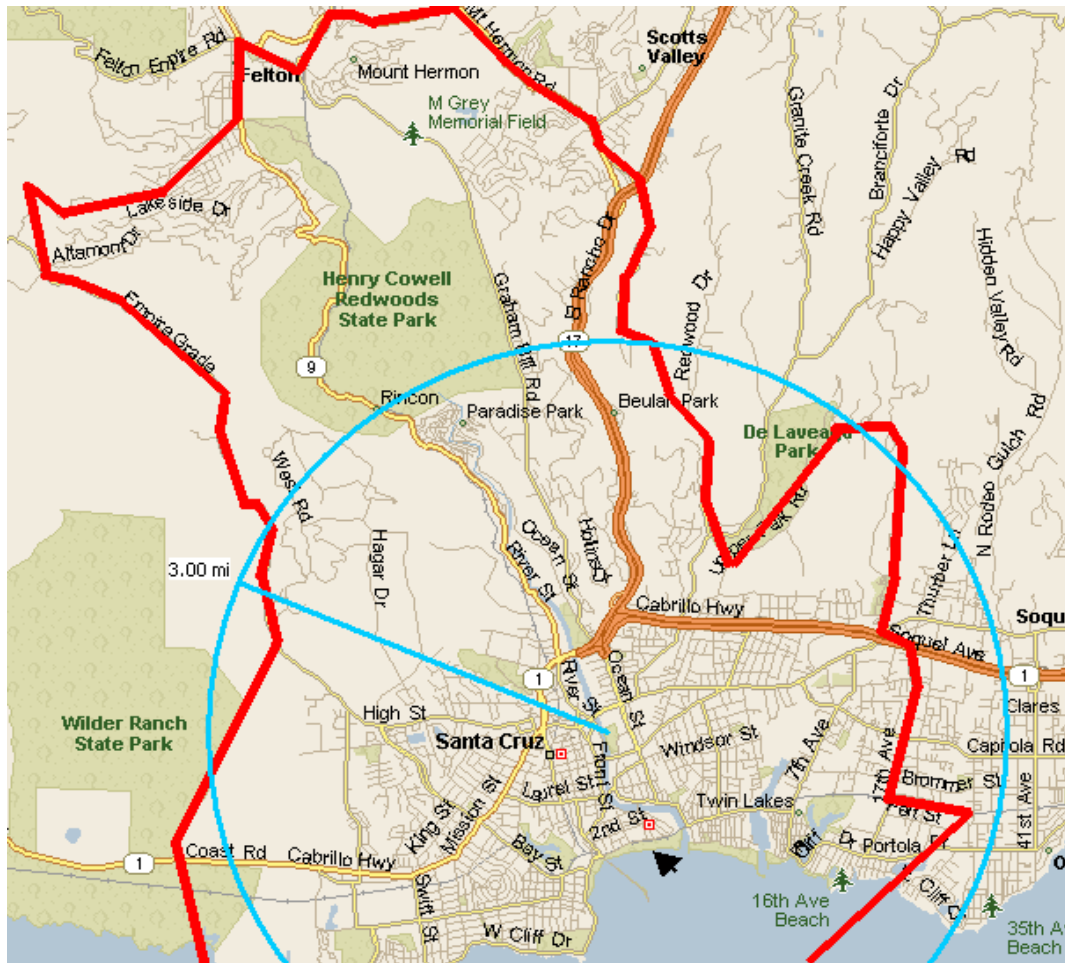


Figure 12: The primary trade area is outlined in red on the map above.

Secondary Trade Area

To service the Community-oriented needs of all four retail zones:

- North to Boulder Creek (13 miles).
- East to Soquel San Jose Road (five miles).
- South to the Pacific Ocean/Monterey Bay (one mile).
- West to The San Mateo/Santa Cruz County Line (20 miles).

The east edge of the secondary trade area is limited by Capitola Mall and its surrounding retail and restaurant centers that will likely intercept much of the potential downtown, east, west and downtown areas. These centers offer department stores, desirable retailers, easy parking and vagrant free shopping.

Please refer to the following map for a visual depiction of the secondary trade area:



Figure 13: The secondary trade area is outlined in green on the map above.

Tertiary Trade Area

To service the retailers in areas with regional/destination tenants:

- Extends further to the north, to the Santa Clara/Santa Cruz County Line (15 miles.)
- East to the forest of Nisene Marks State Park (10 miles).

Please refer to the following map for a visual depiction of the tertiary trade area:



Figure 14: The tertiary trade area is outlined in violet on the map above.

Demographic Characteristics

Using data from ESRI and Claritas, GPG obtained the population and demographic characteristics for the defined trade areas, as well as for Santa Cruz, the surrounding communities, and Santa Cruz County.

The primary trade area has an estimated current population of 76,400 persons, which is projected to decline slightly to 75,800 persons by 2016, a projected decline of one percent over the five-year period. The primary trade area's household base is also projected to decline slightly from 29,080 to 28,890 (one percent) over the next five years. The household base is 46 percent owner-occupied with eight percent seasonal households. Persons-per-household is reported as 2.4.

The secondary trade area offers an additional 53,900 persons for a total community-oriented trade area base of 130,300 persons. This base is also projected to decline slightly to 129,340 persons by 2016 (one percent). The total secondary household base is reported as

50,400 and projected to decrease to 50,100 by 2016. The total secondary household base is 51 percent owner-occupied and nine percent seasonal. Persons-per-household is slightly higher than that of the primary trade area (2.42).

Finally, the tertiary or total trade area offers an additional 33,300 persons for a total trade area population base of 163,600. As in the other areas, the base is projected to decline slightly (one percent) through 2016, to only 162,250 persons. The total trade area's household base is reported as 64,740, of which 52 percent are owner-occupied and 10 percent are considered secondary or seasonal households. Persons-per-household are reported as 2.39.

The following table presents and compares the demographic characteristics found in the defined primary trade area to that of the city of Santa Cruz and Santa Cruz County:

Figure 15: Demographic Characteristics Table

Characteristics	Primary (Neighborhood) Trade Area	Secondary (Community) Trade Area	Total (Regional) Trade Area	Santa Cruz City	Santa Cruz County
2011 Population	76,400	130,300	163,600	54,790	261,160
2016 Population	75,810	129,340	162,250	54,395	260,533
Projected Five-year Growth	-1%	-1%	-1%	-1%	0%
2011 Households	29,080	50,400	64,740	20,812	93,671
2011 Median H'hold Income	\$69,747	\$73,808	\$74,606	\$69,247	\$72,278
2011 Per Capita Income	\$36,369	\$37,487	\$39,291	\$35,884	\$34,767
% H'holds: Incomes \$100,000+	33%	35%	36%	33%	34%
Persons-Per-Household	2.37	2.42	2.39	2.39	2.68
% H'holds Owner-Occupied	46%	51%	52%	43%	53%
% White	74%	77%	80%	73%	70%
% African American	2%	1%	1%	2%	1%
% Asian	8%	7%	4%	9%	6%
% Hispanic Ethnicity	23%	24%	16%	30%	47%
Median Age	34.4	36.5	38.0	33.4	36.1
% White-Collar Employed	63%	70%	70%	70%	66%
Bachelors Degree or higher	48%	46%	46%	51%	40%

As shown in the Demographic Characteristics Table, incomes in the defined trade areas are well above state and national averages, with median household incomes reported as \$69,750, \$73,810, and \$74,600, and are stable throughout the county. Per-capita incomes remain strong as well, reported as \$36,370, \$37,490, and \$39,290. Approximately one-third of the household base reports incomes of \$100,000 or higher.

The average age in the market (34.4) is slightly lower than found in the U.S., but it increases as the trade area increases (36.5 and 38.0, respectively). Due in part to the influence of the University of California-Santa Cruz, the primary trade area has a much larger percentage of

those aged 20 to 35 (30 percent) when compared to that found in the secondary and tertiary trade areas (21 percent and 18 percent, respectively).

A majority of the housing base is renter-occupied (only 46 percent of the primary trade area base is owner-occupied), but owner-occupied housing does grow gradually as the trade area increases (51 percent and 52 percent). Both white-collar employment and education levels are very high throughout the defined trade areas.

When compared on a one-mile ring basis, the West Zone (Cabrillo Highway-Mission Street) has the least population density and the Central/Pacific Avenue location has the most (13,500 persons compared to 24,590 persons). However, future growth is projected to be strongest in the West Zone (Cabrillo Highway) at 3.6 percent.

Median household incomes by radius are strongest in the East Zone (Soquel Avenue) (\$61,310) and weakest in the Waterfront zone (\$50,500). Per-capita incomes, however, are highest in the West Zone (\$33,430), followed by the East Zone (\$32,630), Waterfront Zone (\$31,890), and Central Zone (\$31,710).

The following table details the population and select demographics in a one-mile radius of the four study areas:

Figure 16: One-Mile Radius Demographics and Population Table



Demographic Category	West Zone	East Zone	Central Zone	Waterfront
Radius:	1-Mile	1-Mile	1-Mile	1-Mile
2010 Population	13,499	21,658	24,590	19,911
2015 Population	13,980	22,034	25,308	20,351
% Projected Growth	3.56%	1.74%	2.92%	2.21%
Median Household Income	\$58,296	\$61,308	\$54,470	\$50,503
Per-Capita Income	\$33,431	\$32,628	\$31,711	\$31,891
Household Size	2.32	2.41	2.33	2.28
% Owner Occupied	42.43	40.75	32.13	28.61
Median Age	37.78	37.27	35.25	35.19
% White	75.68	75.99	73.70	75.07
% Hispanic	20.65	22.60	24.17	23.68


Please refer to the expanded profiles by radius (one-, two- and three-miles) for the four identified study areas in the Appendix for further details.

Tapestry Lifestyles

ESRI has developed Tapestry Lifestyles, which is an attempt to create 65 classifications, or lifestyle segments, that help determine purchasing patterns. These segments are broken down to the U.S. Census Tract level throughout the United States and are used by many national retailers to help determine future potential locations. The following table details the top Tapestry Lifestyles found in the greater-Santa Cruz trade areas:

Figure 17: Tapestry Lifestyles Table

Lifestyle	Primary Trade Area	Secondary Trade Area	Total Trade Area	Short Description
Urban Chic 	12,856 44%	24,518 49%	33,485 52%	<p>Urban Chic Households are split evenly between married couples and singles. Their median age is 41.2 years; most householders are between the ages of 45 and 54. Most of these residents are white; some Asian population is apparent. They are nearly one and a half times more likely to obtain additional income from self-employment opportunities or interest, dividends, and rental properties.</p> <p>They are well educated; more than half hold a Bachelor's or graduate degree. They work in professional or technical jobs. The busy, computer-savvy <i>Urban Chic</i> residents tend to own Apple computer technology. They drink Starbucks coffee from their own ground beans, imported wines and premium domestic beers. They stay physically fit by skiing, practicing yoga and lifting weights. They often buy nutrition and energy bars, take vitamins, but don't use non-prescription diet pills.</p> <p><i>Urban Chic</i> residents take advantage of city life by visiting museums, attending dance performances and working actively for political parties. They shop at Nordstrom, Bloomingdale's, Ann Taylor and Macy's.</p>
Trend Setters 	6,326 22%	7,047 14%	7,804 12%	<p>Trendsetters Are ethnically diverse; almost 12 percent of the population is Asian and 20 percent is Hispanic. These well-educated professionals hold substantive jobs, with 15 percent self-employed. On the cutting edge of urban style, <i>Trendsetters</i> are young, diverse, and mobile and found primarily on the West Coast. Eschewing home owning responsibilities, they rent in upscale, multiunit settlements in older city districts.</p> <p><i>Trendsetters</i> are spenders; they buy from stores and online. Favorite stores include Banana Republic, Nordstrom, Macy's, Ann Taylor and Bloomingdale's. They spend a lot on apparel such as designer jeans and workout clothing. Their preferences for high-end products carry over to beverages; <i>Trendsetters</i> drink imported beer, wine and Starbucks coffee. and enjoy personal and business self-help books.</p> <p><i>Trendsetters</i> also buy history, non-fiction and biographies online and at bookstores. To keep up and to keep in touch, <i>Trendsetters</i> are never far from their electronic gadgets. They keep in shape by practicing martial arts, hiking and playing tennis. Health-food favorites include energy bars, sourdough bread, frozen yogurt and frozen veggie burgers.</p>

Lifestyle	Primary Trade Area	Secondary Trade Area	Total Trade Area	Short Description
Old & New-Comers 	2,605 9%	4,593 9%	4,593 7%	<p>Old and Newcomers Are neighborhoods in transition, populated by renters who are either starting their careers or retiring? There are more single-person and shared households than families in these neighborhoods. Some have attended college; nearly 20 percent hold a Bachelor's degree and ten percent have completed graduate school.</p> <p>They work in the service, retail, healthcare, sales, administrative and government industries. Purchases of children's books, osteoporosis medications and long-term-care insurance policies reflect the disparate ages of the residents in <i>Old and Newcomers</i> neighborhoods. They take their cars to chain stores for service, drink domestic table wines and buy home office furniture. Health-conscious <i>Old and Newcomers</i> take ginseng, use prescription medications for dry eyes and buy organic foods.</p> <p>They exercise regularly in programs at the gym. Younger <i>Old and Newcomers</i> go to the movies about once a month, visit the zoo and gamble in Las Vegas. They listen to classic hits, classical, and Hispanic radio and watch The Golf Channel and MTV2 on television.</p> <p>They shop at Pier 1, Harris-Teeter and Walgreen's stores, order from priceline.com and own a pet cat. Although they don't dine out very often, when they do their favorite restaurants include Tony Roma's, Steak 'n Shake, and Red Robin.</p>

The Santa Cruz Tapestry household base is primarily comprised of "Urban Chic" consumers (44 percent in the primary trade area, growing to 52 percent in the overall trade area.) They are affluent households, well-educated, and white-collar employed. Many are also self-employed. They are avid Apple consumers, like Starbucks, and shop at better retailers such as Ann Taylor and Nordstrom.

The next strongest Santa Cruz lifestyle is the "Trendsetters" (22 percent of the primary base, dropping to 12 percent of the total base). While more racially diverse than the Urban Chic households, Trendsetters are still well-educated and white-collar-employed with many self-employed. They are apt to be renters with strong incomes. They are spenders, shopping at retailers such as Nordstrom, Banana Republic, and Macy's. Like the Urban Chic lifestyles, Trendsetters like their Starbucks coffee, as well as imported beer and wine.

The final major Santa Cruz lifestyle identified is that of the "Old and Newcomers," representing only seven to nine percent of the household base. Old and Newcomers are renters who are young and starting their careers, or older and getting ready to retire. The households tend to be smaller with many single-occupant abodes. Due to the age variance, Old and Newcomers have varied purchasing habits, but tend to be a more moderate consumer than that found in either of the other lifestyles. While still health-conscious, they drink domestic wines, don't dine out often, and are more apt to be employed in service-oriented industries such as sales or retail.

Daytime Employment

In addition to the residential base, the Santa Cruz study areas have the opportunity to serve a sizeable daytime employment base. The following table details the nearby daytime employment base by employment type for each of the study areas:

Figure 18: Daytime Employment Table (Source: Nielsen Claritas)

Description	<i>West Zone</i>	<i>East Zone</i>	<i>Central Zone</i>	<i>Waterfront Zone</i>
	<i>Cabrillo Highway</i>	<i>Soquel Avenue</i>	<i>Pacific Avenue</i>	<i>Beach Street</i>
	5 Minute(s) Drive Time 1	5 Minute(s) Drive Time 1	5 Minute(s) Drive Time 1	5 Minute(s) Drive Time 1
Total Employment	32,987	37,779	33,621	28,523
Executive and Professional	11,245	12,664	11,432	9,602
Management	2,430	2,745	2,469	2,069
Sales and Marketing	3,651	4,070	3,719	3,080
Health-Legal-Social	1,991	2,489	2,061	1,782
Engineer-Science-Computer Professional	1,051	1,081	1,046	871
Educators	1,402	1,515	1,413	1,183
Journalists-Creative Professional	720	763	723	615
Administration and Support	8,769	10,143	8,903	7,489
Management Support	1,313	1,432	1,316	1,158
Admin-Clerical Support	6,240	7,169	6,340	5,305
Technical Support	1,216	1,542	1,247	1,025
Service Personnel	6,602	7,626	6,829	6,384
Health Care Personnel	378	707	416	341
Food and Beverage	4,065	4,441	4,229	4,054
Personal Services	1,428	1,685	1,451	1,324
Protective Services	731	793	733	665
Trade and Labor	6,372	7,346	6,456	5,048
Construction	837	1,003	828	586
Installation and Repair	2,013	2,428	2,047	1,749
Craft Production	490	511	480	313
Machine Operators	488	493	499	370
Assemblers	311	276	308	182
Transportation	900	1,018	942	800
Agriculture	496	621	494	398
Laborers	836	997	857	651

Within five minutes of each of the study areas, there is a strong employment base that might shop or dine at retailers and restaurants in the area. The employment base grows from a population of 28,520 at the Waterfront location to 37,800 in the East Zone (Soquel Avenue). A strong percentage of those employed near the study areas are “executive and professional” positions (34 to 36 percent) followed by 26 to 27 percent employed in “administrative and support” positions. “Service personnel” and “trade and labor” represent 19 to 21 percent of the daytime employment base.

Unemployment rates in the area are higher than that found in the U.S. overall. In January 2011, the unemployment rate for the City of Santa Cruz was 12.4 percent, compared to 12.4 percent for the state of California and nine percent for the U.S. overall. This rate is down slightly (-0.6 percent) from the 13.0 percent rate reported in January 2010.

University of California-Santa Cruz

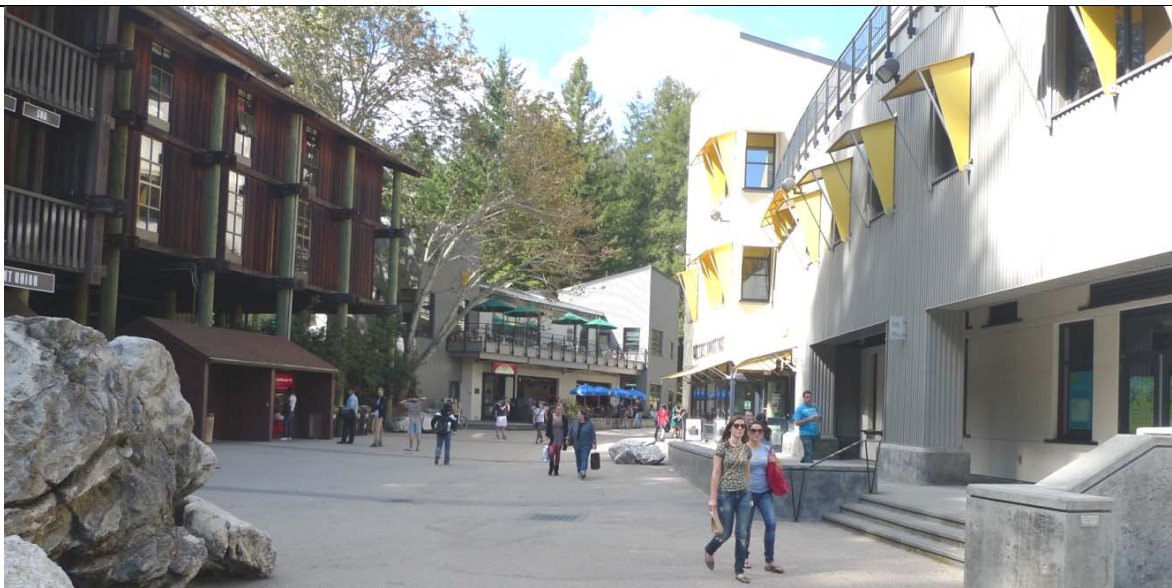


Figure19: The University of California-Santa Cruz's campus commercial district (shown above) offers basic food and sundries for its 16,000 students. It is anchored by the Bay Tree Bookstore, Graduate Student Commons, and Joe's Pizza and Subs.

The Santa Cruz area is greatly influenced by the University of California-Santa Cruz, which is located just 2.5 miles northwest of the downtown. The university is the largest employer in the county, and issued 12,000 W-2's in 2009. Overall, the University has an estimated \$960 million impact on the region.

The campus was opened in 1965 and has grown from the original 650 students to a 2010 enrollment of 16,330 students and 500 faculty members. Over 90 percent of the student body is comprised of undergraduates. UCSC operates with a 2011-2012 budget of nearly \$570.2 million. Undergraduate students are able to pursue more than 60 majors and graduate students can choose from advanced degrees in more than 30 academic fields, from its top-ranked astronomy or ocean sciences programs to computer game design, film or digital media.

The university boasts the following accolades:

- Ranked in the top 22 percent of U.S. public research universities (2007 - *U.S. News & World Reports*).
- First nationally for research impact in physics and fifth for impact in space sciences (2007 - *Science Watch*).
- Third on the Faculty Scholarly Index among doctoral programs in music and environmental health engineering (2007).
- One of the top 10 greenest colleges in the nation by the Sierra Club (2003).



Figure 20: The waterfront area is one of the region's largest seasonal tourist attractions.
Shown: Beach Street looking west.

Tourist Impact

According to the *2009 Visitor Market Profile & Conversion Study* prepared by Campbell Rinker, it is estimated that those visiting the area spend between \$91.6 million and \$98.3 million, annually. These expenditures include lodging, transit, food/restaurant, entertainment, and shopping in the area. The study included those contacting the Santa Cruz County Conference and Visitors Council for information for a potential trip to the area. In September 2009, 397 people took a phone survey for the study and 1,190 people took the survey on-line. As such, the findings are reported to have a 95 percent confidence level. However, the sample was limited to those who initiated contact with the Convention and Visitors Council for information. GPG recommends that further research be conducted to better understand the area's tourism demographics and spending preferences.

The following table details the average spending per day per group, as reported by the Campbell Rinker analysis:

Figure 21: Average Daily Spending by Visitors to Santa Cruz County

<i>Spending Category:</i>	<i>Overall</i>	<i>First Time Visitors</i>	<i>Paid Lodging Visitors</i>	<i>Summer Visitors</i>
Hotel/Lodging	\$139/35%	\$140	\$188	\$144
Meals/Snacks	89/16%	85	85	81
Drinks/Beverages	31/7%	29	36	33
Shopping/Gifts/Souvenirs	59/12%	57	61	52
Attraction admission/Museums/Nightclubs	34/7%	36	36	40
Activity Admission or Equipment Rentals	14/3%	15	14	10
Local Transportation	29/6%	28	29	24
Spa/Health Club Amenities	6/2%	3	9	7
Grocery/Personal Items	35/7%	31	38	36
Other/Not Listed	34/5%	13	24	14
Total:	\$470	\$437	\$520	\$440

As such, the annual amount spent in Santa Cruz County by the tourist component for those categories represented by this analysis is as follows:

Figure 22: Annual Tourist Spending in Santa Cruz County

Shopping Category	<i>Estimated Low Expenditure</i>	<i>Estimated High Expenditure</i>
Shopping	\$11.0 Million	\$11.8 Million
Grocery/Personal Items	6.4 Million	6.9 Million
Meals/Snacks	14.7 Million	15.7 Million
Drinks/Beverages	6.2 Million	6.7 Million
Total:	\$38.3 Million	\$41.1 Million

The average stay was reported as two to three days (41 percent). The common profile of an *overnight visitor* is a group of five with the head of household in their fifties and married; 34 percent had children living in the home. Most had a college degree and 38 percent reported an annual household income of \$100,000 or more. Racially, most were Caucasian and spent \$1,831 while on the trip.

By comparison, the profile of the *day visitor* was a party of four with the head of household in his or her forties and married; 37 percent had children living in the household. Day-trippers were, like the overnight visitors, predominantly Caucasian and had a college degree. Incomes were also comparable, with 37 percent of those responding reporting an annual average household income of \$100,000 or higher.

Many (57 percent) of those responding to the questionnaire had visited the area previously within the past two years, with an average number of 2.1 visits for all inquirers. One in four visitors (25 percent) is a first-time visitor. The most frequent reason for the respondents' trip was for "vacation" (77 percent), followed by "visiting family and relatives" (29 percent), "business" (seven percent) and "passing through to another destination" (nine percent).

Seasonally, most visit the area in the summer months (June-August: 52 percent) followed by spring (March-May: 23 percent) and fall (September-November: 20 percent). Only six percent of the visitors are in the area during the winter months (December-February).

Activities while in the area included:

- Eating in restaurants (80 percent)
- Going to the beach (70 percent)
- Visiting attractions (69 percent)
- Sightseeing/exploring the area (67 percent)
- Shopping (52 percent)
- Visiting the State Parks/Redwoods (46 percent)
- Outdoor recreational activities (38 percent)
- Visiting cultural and/or historical sites (30 percent)
- Water recreation/activities (23 percent)

Most of those visiting Santa Cruz County reported visiting:

- Santa Cruz Boardwalk (73 percent)
- Santa Cruz Wharf (66 percent)
- Downtown Santa Cruz (65 percent)
- Capitola Village (31 percent)
- Capitola Mall (22 percent)

The *Santa Cruz Visitor Profile*, as presented by Lauren Schlau Consulting in March 2010, reported the results of a total of 706 visitor groups interviewed on-site at specified locations around Santa Cruz County during spring-fall 2009. Approximately 24 percent of the interviews were conducted on the wharf, 19 percent were conducted downtown, 18 percent were conducted at Roaring Camp, 17 percent were conducted on the main beach, and 15 percent were conducted in Capitola. While the 2009 Visitor Market Profile & Conversion Study by Campbell Rinker included only those who had requested information from the conference and visitor's council, the Lauren Schlau Consulting survey included all those visiting the area.

By far, most of those interviewed were Californians (76 percent), with 16 percent from other U.S. states and 8 percent from foreign countries. (Of the California residents, 89 percent were from Northern California.) Most of the respondents (76 percent) were repeat visitors, averaging ten trips in the past two years; as such it is not surprising that 44 percent planned the trip based on their own experience or previous trips.

Of those surveyed, Santa Cruz County was the main destination for 80 percent of the respondents, with the city of Santa Cruz the primary destination for 53 percent of the respondents. The primary transportation used to arrive to the region was personal/ borrowed car (59 percent), followed by commercial airline (27 percent), and tour bus (seven percent). Vacation was the primary reason to visit (84 percent), followed by visiting friends/relatives (six percent) and business (three percent).

Top activities reported by the Lauren Schlau Consulting survey included:

Figure 23: Top Visitor Activities in Santa Cruz County

Activity	Total	Season		
		Spring	Summer	Fall
Go to the beach	73%	69%	83%	66%
Visit Attractions (Boardwalk, Wharf, Roaring Camp)	70%	70%	75%	65%
Eat at area restaurants	70%	63%	76%	73%
Sightsee/explore the area	54%	50%	48%	66%
Shop	40%	34%	38%	50%
Visit State Parks/Redwoods	19%	21%	14%	21%
Outdoor recreation	13%	11%	15%	14%

The top venue visited in the area was the Santa Cruz Boardwalk (64 percent) followed by the Santa Cruz Wharf (53 percent), Downtown Santa Cruz (40 percent), Capitola Village (20

percent), and Capitola Mall (5 percent). As might be expected, the boardwalk visitation was highest in the summer, while the wharf and downtown visitation was highest in the fall months.

Of those surveyed, 63 percent were visiting the area only for the day, with 37 percent staying overnight. Most (42 percent) of the overnight visitors stayed at an area hotel/motel, followed by 30 percent staying with a friend or relative, 17 percent staying at a campground, and 9 percent staying at a vacation or secondary residence. The average length of stay for overnight visitors was reported as 3.3 nights, with those staying in a private residence staying the most nights.

Spending by category *per-day* for all visitors was reported as:

Figure 24: Visitor Spending Per Day

Spending Category	Percent of Groups Spending	Per Group	Hotel Guests	Day Visitor
Meals/Snacks	89%	\$43.98	\$64.50	\$40.95
Hotel/Lodging	23%	27.38	106.45	5.47
Shopping/Gifts/Souvenirs	42%	25.38	33.85	20.84
Admissions	24%	12.93	19.72	12.69
Drinks/Beverages	64%	10.50	15.47	9.74
Local Transportation	56%	6.01	7.01	5.81
Groceries/personal items	11.3%	4.43	4.31	1.80
Activity/equipment rental	3.7%	1.52	2096	1.37
Total/Overall	97.8%	\$131.13	\$252.36	\$97.43

Note: These figures are 51 percent less than those reported by the Campbell Rinker study. This may be attributable to the higher incidence of overnight visitors contacting the Convention and Visitors Council for information and, thereby, being included in the survey sample.

The visitor profile, as reported by the Lauren Schlau Consulting analysis, is a mean persons-per-group of 3.1 persons, with 36 percent married, 29 percent coupled, and 15 percent traveling as friends/co-workers. Only 22 percent were traveling with children. The average age reported was 41.2 years, with 35 percent having children at home under the age of 18. The median household income was reported as \$77,900.

The marketing department of the Santa Cruz Beach Boardwalk estimates that more than three million people visit the City of Santa Cruz Beach Area each year. There has been no reduction in this number since the recession began. It has, if anything, increased since 2007 based upon parking counts and Beach Boardwalk visitors.

Expenditure Potential

The residential expenditure potential for most categories is 15 to 25 percent higher than that found in the greater U.S. The only categories identified where the reported potential is *less* than the U.S. average is art and craft stores (98 percent of the U.S. average), drug stores (94 percent), toys and hobby shops (86 percent), video/entertainment (98 percent), and

children's apparel (96 percent). The following table details the current reported expenditure potential for the four defined residential trade areas:

Figure 25: Expenditure Potential for Defined Residential Trade Areas

Category	Primary (Neighborhood) Trade Area ('000's)	Secondary (Community) Trade Area ('000's)	Tertiary (Regional/Total) Trade Area ('000's)
Department & Disc. Dept. Stores	\$159,131	\$275,783	\$354,241
Apparel, Shoes & Accessories	137,437	238,186	305,947
Food & Restaurant	336,962	583,973	750,108
Other Retail	495,430	858,607	1,102,872
Total Residential Expenditure Potential:	\$969,828	\$1,680,766	\$2,158,927

In addition to the residential expenditure potential, the area also has expenditure potential available for retail/restaurants uses in the area due to the tourist base, the student population base, and the daytime population base. The following table details the added potential in the market due to these non-residential components:

Figure 26: Additional Market Potential

Retail Category	Student Population Base (‘000’s)	Daytime/Business Population (‘000’s)	Tourist Potential (‘000’s)
Department & Disc. Department Stores	\$3,167	\$3,988	\$1,206
Apparel, Shoes & Accessories	5,269	6,634	2,007
Food & Restaurant	31,504	77,989	27,800
Other Retail	21,197	26,689	8,401
Total Residential Expenditure Potential:	\$61,137	\$115,300	\$39,414

The city of Santa Cruz provided sales tax data by retail category for the four defined study areas as well as for the Mission Street district (West Santa Cruz). In total, sales tax collected for the city was down 14 percent from 2009 to 2010. Most of the decline was experienced in the food/restaurant category, which reported a 24 percent decline in sales tax revenue. “Apparel, shoes and accessories” and “other retail” showed a three percent increase and two percent decrease, respectively, over the same period.

This study has estimated the amount of sales not captured by retailers/restaurants by using the identified expenditure potential and comparing it to the sales tax data provided by the city. This “leakage” includes sales lost to:

- Internet sales
- Sales by retailers/restaurants within the primary trade area which have not been reported for sales tax purposes
- Retailers/restaurants outside of the defined primary trade area

Figure 27: Retail Sales Leakage

Category	Identified Potential (000's)	Revenue Captured (000's)	Leakage
Apparel, Shoes & Accessories	\$170,308	\$47,397	73%
Food & Restaurants	\$495,053	\$154,162	69%
Other Retail	\$620,498	\$97,340	84%
Total:	\$1,285,859	\$298,899	77%

Note: The defined trade area boundaries are larger than the city's boundaries, where the sales tax data is derived from. The primary trade area (defined for the east commercial zone) does not include the entire City and the other two trade areas include areas outside of the city.

Note that the available expenditure potential includes the estimated tourist potential for the entire Santa Cruz County, as well as the daytime/employment potential and the estimated student potential. Please refer to the primary trade area boundary. A detailed report for the sales tax revenue by retail category for 2009 and 2010 can be found in *Appendix Table 6: Reported Sales Tax - Select Areas of Santa Cruz*. Note that this Appendix reports the one percent sales tax paid to the City of Santa Cruz General Fund. Gross Sales are therefore 100 times this amount.

Competitive Retail Centers

The only existing regional-oriented retail center in the Santa Cruz area is the Capitola Mall, located just three miles east of downtown Santa Cruz, at the intersection of 41st Avenue and Capitola Avenue, just south of Highway 1. The center is a conventional enclosed regional mall with gross leasable area (GLA) of nearly 488,000 square feet of retail space. Anchors of the center include Kohl's, Macy's, and Sears with a Target proposed to open in a vacant anchor space. The ancillary space in the center has a variety of retailers to appeal to both moderate and wealthy consumers. Retailers include Coach, Abercrombie & Fitch, American Eagle Outfitters, Rue 21, Victoria's Secret, and Christopher & Banks. Vacancies at the center are minimal with only nine percent of the ancillary space currently vacant.



Figure 28: The Capitola Mall (above, left) is the only existing regional-oriented retail center in the Santa Cruz area, anchored by Macy's (above, right), Kohl's, and Sears.

Surrounding the Capitola Mall are several other retail centers including:

- Redwood Center, with 240,000 GLA anchored by Best Buy, Home Depot, and Safeway.
- Kings Plaza, with 139,000 GLA of retail space anchored by Orchard Supply, SaveMart, and RiteAid.
- Brown Ranch Marketplace, with 103,150 GLA of retail space anchored by Trader Joe's, Bed Bath & Beyond, and Fresh Choice.

- Capitola Station, with 90,000 GLA of retail space anchored by Whole Foods, BevMo, and CVS.

In total, the Capitola retail hub offers over one million square feet of retail space.



Figure 29: Redwood Center (left) and Kings Plaza (right).



Figure 30: Brown Ranch Marketplace (left) and Capitola Station (right)

Additionally, Capitola has a small upscale-oriented shopping district called Capitola Village, located near the bay. The retail in the district is comprised of independent retailers with an appeal to higher-income consumers. The district has on-street parking with metered parking provided nearby.



Figure 31: Capitola Village is a small, upscale-oriented shopping district.



Figure 32: Aerial view of the Pacific Avenue-Downtown Area retail zone (view looking west).

DOWNTOWN AREA

The downtown - the Pacific Avenue and Front Street area - is the historical central business district for Santa Cruz. It has evolved into an attractive boutique shopping destination with over 200 stores and restaurants. Although unique, the downtown no longer serves as the region's primary shopping area. The Capitola Mall area located just three miles to the east contains one million square feet of regional retail and attracts the vast majority of the area's shoppers and retail spending.



Figure 33: The Pacific Avenue retail zone features popular entertainment venues The Del Mar Theater (left) and Regal Cinema (right).

Downtown's retailers include a noted bookstore hub (Bookshop Santa Cruz, Logo's Bookstore, and Borders until it recently closed), as well as apparel anchored by The Gap/Gap Kids, Urban Outfitters, American Apparel, and Pacific Trading Company. The district also has a strong specialty food store base with New Leaf and Trader Joe's groceries and an assortment of popular local restaurants including: Hoffman's Bistro, Rosie McCann's Irish Pub, 515, Red, Soif Wine Bar, Laili Restaurant & Grill, Little Shanghai Restaurant & Espresso, Starbuck, Coldstone Creamery, Pete's Coffee, Shogun Sushi, Walnut Avenue

Café, Pacific Cookie Company, Woodstock Pizza, and Taqueria Vallarta among many others.

The downtown's restaurants and entertainment venues are a strong attraction to the University of California-Santa Cruz students, and the area's tourists. The downtown features a famous jazz club, Kuumbwa, and a popular music venue, The Catalyst. The Del Mar Theater, Nickelodeon Theaters, and Regal Cinemas add a cinema entertainment component and the existing club/bar scene (Blue Lagoon, Catalyst Club, The Asti, The Avenue Bar and Surf City Billiards) is an evening draw. Finally, the three-story Museum of Art and History is also located in the downtown district.

The downtown business district has a strong appeal to the area's student population and tourists, yet still serves as a regional-oriented shopping hub.

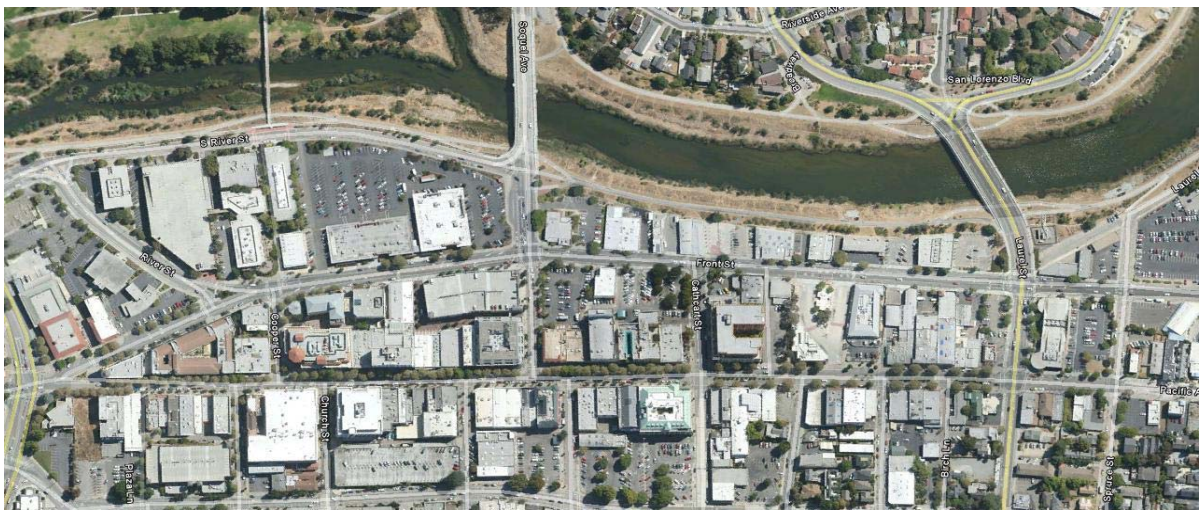


Figure 34: Santa Cruz downtown area: Front Street and Pacific Avenue (north to the left)

Access

Local access to the downtown district is good, provided by Water Street to the north, as well as Soquel Avenue and Broadway from the east and Laurel from the west. Regional access to the district is indirect, but mainly provided by CA Highway 1 and CA Highway 17. Highway 1 offers four lanes of uncontrolled access roadway to the northwest edge of the City and four lanes of limited access throughway to the east of River Street. Highway 17 flows to the north with four lanes of limited access roadway to Los Gatos, where it converts into Interstate 880 traveling north to San Jose and Oakland.

While street access to the downtown is relatively direct and only a few blocks from highways 1 and 17, Pacific Avenue's businesses are nearly impossible to reach due to the area's traffic circulation patterns. A warren of one-way streets and 'T' intersections features a main street, Pacific Avenue, with both north-bound and south-bound one-way streets making it impossible for drivers to travel the length of this retail thoroughfare in one direction. The negative impact of the one-way streets on retail sales and the downtown's overall sustainability cannot be over emphasized.

Parking

Parking for the district is relatively easy and convenient given its urbanism, although many of the garages are in various stages of disrepair and less appealing than private sector industry standards. Parking for the retail/restaurant uses in the district is provided by a mix of on-street (parallel) parking as well as additional parking lots. On-street parking is managed by parking meters, and the parking structures and surface parking utilizing parking machines.

Visibility & Signage

Modern retailers depend on clear visibility and effective signage for their commerce, especially small independent business owners that cannot afford sustainable advertising. In general, this study finds that Santa Cruz's individual businesses as well as the four analyzed business districts need more signage to be competitive with other shopping areas.

Visibility of retail located along Pacific Avenue is limited due to the height of the buildings as well as the density of the area. Limited maps/guides of the district are located in several locations along Pacific Avenue to enhance the ability of those shopping the areas to located specific retail in the area, but these systems should be expanded.

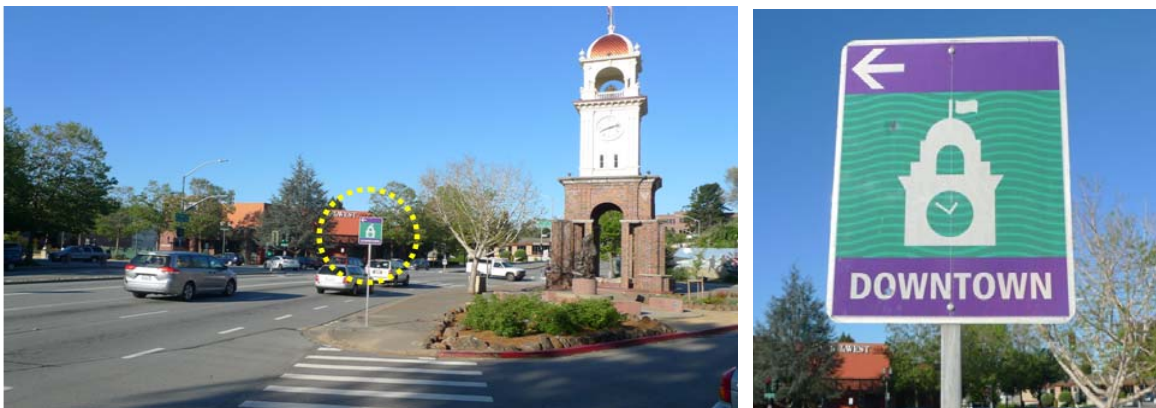


Figure 35: The wayfinding signage for the downtown district is understated and ineffective for attracting shoppers to Pacific Avenue. Shopping traffic could also be improved if the intersection had a more commercial character.

Of critical importance is improvement of wayfinding signage for the downtown district. The City is currently engaged in a wayfinding project to update and improve its existing signage program. This is of the greatest importance in directing visitors to the downtown and, especially, in making it possible for visitors to the beach area to find downtown.

The trolley project, providing virtually free transportation to visitors between the beach and downtown, may have a significant impact on gross sales during the summer months.

Additional Supportable Retail

This study finds that 91,500 gross square feet of new retail space is supportable along the Pacific Avenue/Front Street downtown business district. If implemented, the new retail will increase the strength of the area as a destination shopping district while maintaining the focus of the area featuring local/independent stores with unique appeal.

This new retail will generate approximately \$43.9 million in additional annual sales by 2016 and can be implemented by the expansion of existing businesses or with the opening of 25 to 30 new retailers and restaurants. This additional supportable space can be located within

in existing buildings, with the construction of new commercial, or through increased merchandise and sales of existing businesses.

The findings indicate that adding Nordstrom Rack, Forever 21 or H & M as a new anchor to the district would help increase the appeal of the area to consumers not currently shopping the area, as well as to fill a void in shopping alternatives found by the area's lifestyles.

This study finds that the area should continue to be marketed as a regional shopping district, and that new retail venues will be able to draw from the existing base of customers as well as those not currently shopping in the area. Downtown's current retail stores should benefit significantly from increased retail activity in the area generated by new retailers and national brands.

The supportable retail includes:

- A 25,000-square-foot Nordstrom Rack, Forever 21 or H&M to fill the vacancy created by Borders Books and Music.
- 34,500 square feet of new apparel and shoes to include retailers such as Forever 21, dELIA's, Fresh Produce, Convert Organic Apparel, Two Star Dog, Bancroft Clothing Co., Life is Good, This Little Piggy Wears Cotton, and/or Road Runner Sports.
- 17,000 square feet of new casual restaurants and a local wine outlet/tasting room. Supportable restaurants could include Five Guys Burgers, Fatburger and/or Smash Burger; Voodoo BBQ Grill, Maui Tacos, and Pei Wei.
- 15,000 square feet of other retail such as Apple Computer, Beadworks, Ideal Stationers, Oakley, and/or Any Mountain.

Please refer to the Appendix tables for a complete list of recommended retail and restaurants for this commercial zone.

Rationale

The rationale for recommending the above tenants is presented below:

- ***Stable Population and Household Base.*** The regional-oriented trade area has a current population base of 163,590 persons and 64,740 households. The household base is primarily owner-occupied (58 percent of the household base) with an average persons-per-household of 2.39.
- ***Good Close-in Population Base.*** The population base within one mile of the area includes a population of 24,590, stronger than any of the other identified shopping districts. The close-in base has a stronger rental-household base (68 percent) and is younger (35.3 versus 38.0).
- ***Good Income Levels.*** Income levels in the total trade area are good, with median household incomes reported as \$74,610 and per-capita incomes reported as \$39,290. Close in, the incomes are lower (\$54,470 and \$31,710) due to the higher rental-household base.
- ***Tapestry Lifestyles.*** Tapestry Lifestyles indicate a strong "Urban Chic" consumer (52 percent of the household base) followed by "Trendsetters" (12 percent of the

household base.) These lifestyles indicate an older, well-educated consumer that is physically active and involved in their community.

- ***Good Daytime Population Base.*** The population base has 33,620 persons, second only to the East Corridor/Soquel Avenue shopping district. The base is primarily white-collar employed and most (36 percent) are employed in “executive and professional” positions, followed by an additional 26 percent employed in “administrative and support” positions.
- ***Good Local Access.*** Local access to the area is good, but regional access is limited. The downtown business district is centrally located and well situated to serve not only the residential base, but the student and tourist base as well.
- ***Current Retail Appeal.*** The district is currently anchored by a strong core of independent retailers as well as national retailers that cater to the close-in university student base. The mix of national and independent retail gives the district a unique appeal. The national retailers lend credibility to the area while the independent retailers give the area more of a local flair.

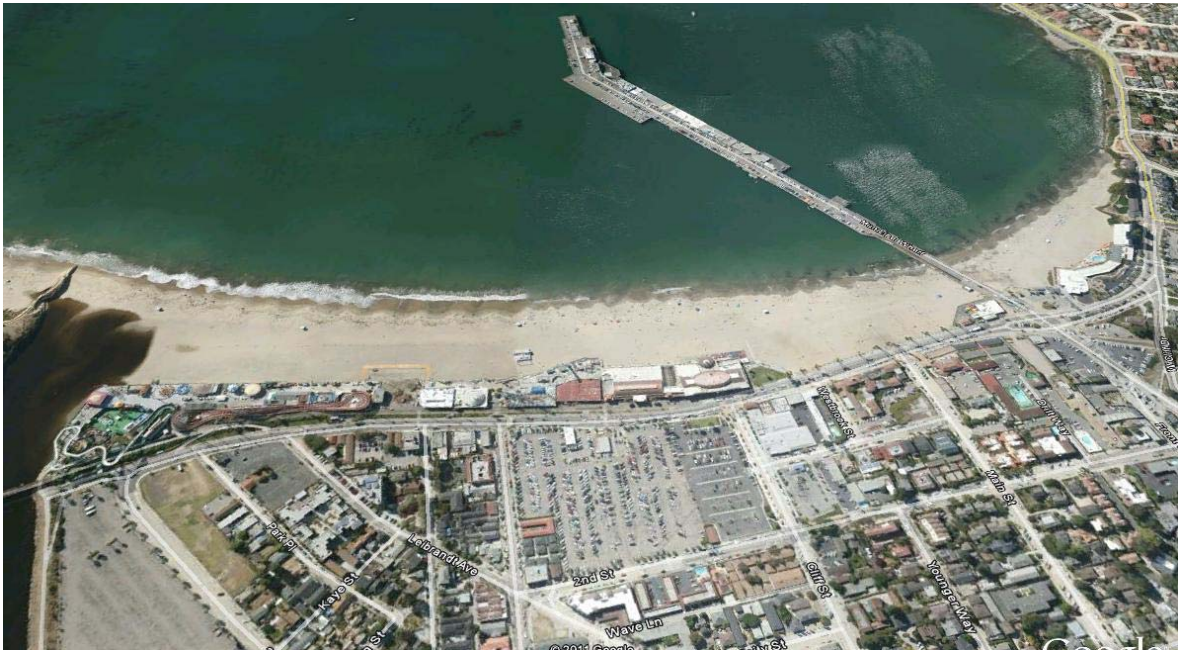


Figure 36: Aerial view of the Santa Cruz waterfront area and Beach Street looking south.

WATERFRONT AREA

The Waterfront-area is located along Beach and 1st Streets from the Municipal Wharf to 3rd Avenue. The district is anchored by the Municipal Wharf, the Casino/Neptune Amusement Centers, the Boardwalk Bowl, and the Boardwalk amusement park. Given the appeal of the area, it serves a regional (total) trade area and is a major tourism draw. Retail density is limited, with many retailers and restaurants closed during slow periods of the year. Other retail/restaurant in the area is limited, and presently, there is not a strong enough hub to be able to remain an attraction during the periods when the Boardwalk is closed.

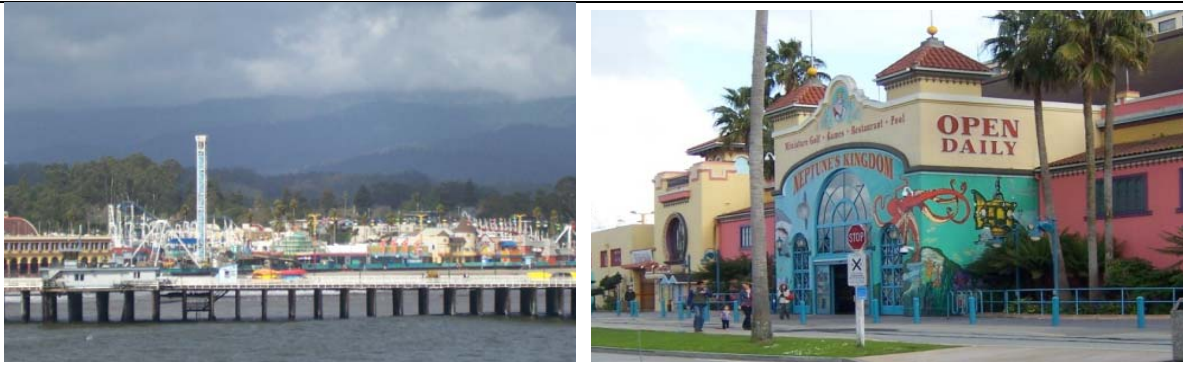


Figure 37: The Waterfront Zone is entertainment-oriented, featuring the Wharf and Boardwalk, (left), and Neptune's Kingdom (right).

Visibility

Visibility of retail located along Beach Street is average with most retail/restaurant uses located on the north side of the street. The Casino/Neptune Amusement Centers and the amusement park are well signed and more visible due to the height and size of the units.

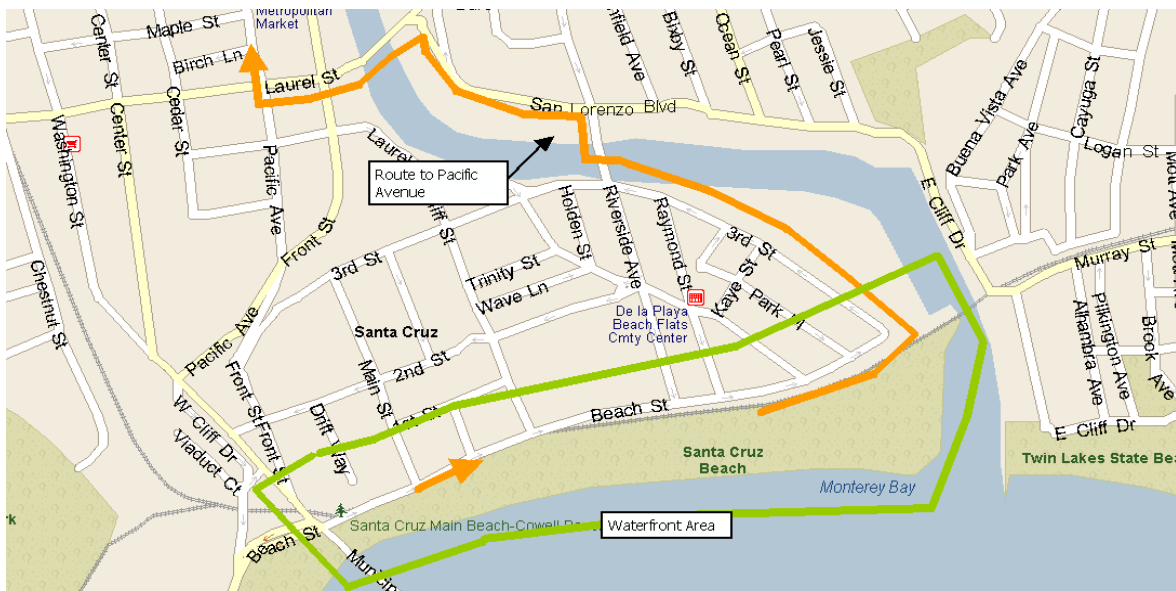


Figure 38: The Waterfront Area fronts directly onto the famous Santa Cruz beach and municipal wharf and is shown inside of the green lines above. Linkage between the waterfront and downtown area are challenging and requires five unmarked turns and two river crossings.

Access

Access to the area is good locally, but indirect and challenging regionally, and the area's close-in population base is more limited than the other defined districts due to the location on the beach. Cliff Drive and Bay Street provide access to the area from the west, and Pacific Avenue provides access to the site from the north. Surprisingly, linkages between the downtown - Pacific Avenue shopping district and the waterfront are nearly impossible. Beach Street visitors seeking to travel to the downtown area must rely on maps or navigational systems to find Pacific Avenue's shops.

Parking

Parking for the area's attractions is located in private paid lots on the north side of Beach Street in front of the Neptune's Kingdom and the Boardwalk Amusement park, and on the east end of Beach Street between 3rd Street and the San Lorenzo River. Parallel parking is also provided along Beach Street's half mile and adjacent portions of the cross-streets intersecting Beach Street and on 1st Street. On the busiest summer weekends the Beach Boardwalk provides remote parking and bus transit between a remote lot at the County Building on Ocean Street. It is assumed that parking is adequate during the height of the summer as the area was visited during the off-season.

Boardwalk Hours

The Boardwalk includes amusement rides, Neptune's Kingdom, the Casino Arcade, Laser Tag, and the Boardwalk Bowl. The Boardwalk's rides are open (weather permitting) throughout the year on weekends, and daily from Memorial Day to Labor Day, during spring-break weeks in April, during the Christmas - New Year's holiday period, and, depending on demand and holiday schedules, at other times during the spring and fall. Other attractions including the arcade and a convention-meeting facility at the Boardwalk are open year-round.

The Boardwalk dates back to 1865 when John Leibrant opened a public bathhouse near the San Lorenzo River. Other public bathhouses soon followed, followed by restaurants, curio shops, and photo stands. Fred Swanton laid plans for a "Coney Island of the West" near the end of the 1800s, capped off by the development of the Giant Dipper in 1924. Reportedly, Beach Area/Boardwalk visitors number more than three million per year.

Additional Supportable Retail

This study finds that 87,000 gross square feet of new retail/entertainment space is supportable along the Waterfront/Beach Street District. This new retail will generate approximately \$37.8 million in additional annual sales by 2016 and can be implemented by the expansion of existing businesses or with the opening of five to 10 new retailers and restaurants.

The supportable entertainment uses will enable the district to appeal to a wider consumer base as well as to reduce the seasonal limitations of the area, enabling the existing restaurant base to upgrade and increase their sales. The supportable retail for the area includes:

- 48,000 square feet of entertainment/restaurant space with operators such as Dave & Buster's, ESPN Zone, Dick's Last Resort, and/or Blues Café, as well as a seafood buffet such as Hokkaido or Moonstar.
- 35,000-square-foot skate park such as Van's Skatepark. This would be in addition to the Ken Wormhoudt skate park on Riverside Avenue that is run by Parks and Recreation and a smaller park on the Westside called Derby Park.
- And a 4,000-square-foot general store.

Please refer to the Appendix tables for a complete list of recommended retail and restaurants for the Waterfront/Beach Street commercial zone.

Rationale

The rationale for recommending the above tenants is presented below:

Stable Population and Household Base. The regional-oriented trade area has a current population base of 163,600 persons and 64,740 households. The household base is primarily owner-occupied (58 percent of the household base), with an average persons-per-household of 2.39.

Good Close-in Population Base. The population base within one mile of the area offers 19,900 persons. The close-in base has a stronger rental-household base (73 percent), is younger (35.2 versus 38.0).

Good Income Levels. Income levels in the total trade area are good, with median household incomes reported as \$74,606 and per-capita incomes reported as \$39,290. Close-in, the incomes are lower (\$50,500 and \$31,890) due to the higher rental-household base.

Tapestry Lifestyles. Tapestry Lifestyles indicate a strong Urban Chic consumer (52 percent of the household base), followed by Trendsetters (12 percent of the household base.) These lifestyles indicate an older, well-educated consumer who is physically active and involved in their community.

Daytime Population Base. While the daytime population base of 28,500 persons is the least of all the identified shopping districts, it does offer additional potential to the area. The base is primarily white-collar employed and most (34 percent) are employed in “executive and professional” positions, followed by an additional 27 percent employed in “administrative and support” positions.

Good Local Access. Local access to the area is good, but regional access is limited. The Waterfront district’s appeal is primarily the beach and the Boardwalk, both of which are a strong draw in good weather, but lack appeal when the weather is less than ideal. Regional access and linkages to the downtown need improvement.

Current Retail Appeal. The district is currently an entertainment district with a strong tourist appeal due to the entertainment venues and the strong density of motels located near the beach. During off-season, many of the current retail and restaurants close.

EAST COMMERCIAL ZONE

The East Commercial Zone extends 1.4 miles along Soquel Avenue, from Ocean Street to Capitola Road. The area offers a mix of commercial and retail outlets, and is anchored by several supermarkets/specialty food stores (Safeway, Whole Foods, Shopper’s Corner, and Staff of Life), Jerry’s Sports, and a mix of apparel/skate/bike shops and furniture/home accessory stores. The eastern end is also anchored by a U.S. Post Office. Retail in the area has a neighborhood appeal, and is thus served by the defined *primary* trade area.

The East Commercial Zone neighborhood offers an eclectic variety of retail and restaurants. There is an unusually strong grocery/food store hub along the corridor with a Shopper’s Corner market, Whole Foods, Staff of Life, and Safeway. Additionally, there is a growing



Figure 39: The East Zone's businesses are clustered along Soquel Drive, developed in a variety of suburban patterns. The entire area has an eclectic mix of local, regional and national retailers.

home accessory/furniture component along the corridor with retailers such as Natural Select ion Furniture, Element Furniture, and Arteak Interiors. Restaurants located in the district include The Buttery Café, Lillian's Italian Restaurant, Taqueria Santa Cruz, Viva's, Charlie Hong Kong's, and Burger King. Other retail includes Bike Trip, Offshore Music, Jerry's Sports, Ace Hardware, two auto dealers and a skate shop called Bill's Wheels.

The corridor is neighborhood-oriented, due to limited access and the strong close-in population density. Parking along Soquel is primarily on-street parking, with additional parking provided either behind the retail or in front of those retailers located in the small strip centers. New retail in the area should continue to build on the strengths of the area or to appeal to the consumer base attracted to the natural food retailers.



Figure 40: The East area has some unique independent retailers that sell a wide variety of goods and services not available in most shopping centers. Some of these businesses attract customers from well beyond the Santa Cruz region.

Access

Local access to the area is good, provided primarily by Soquel Avenue, which offers two lanes of bi-directional traffic. Regional access to the site is indirect, with Soquel Avenue connecting to CA Highway 1½ miles north via Morrissey Blvd. or one mile east of the eastern-most edge of the commercial zone, as well as via Ocean Street which connects to the western edge of the zone.

Visibility & Streetscape

Visibility of the retail located along Soquel Avenue is average at best, due to the limited visual merchandising and signage of many of the businesses. Traffic flow also hinders drivers concentrating on driving while surveying retailers along the street. The streetscape of the area is also minimal, resulting in the area lacking walkability and a general cohesive appeal. The area's collection of unique retailers and restaurants could be enhanced with a streetscape and signage program that reinforces its mid-century modern brand.

The following map details the location of the district along the East corridor:

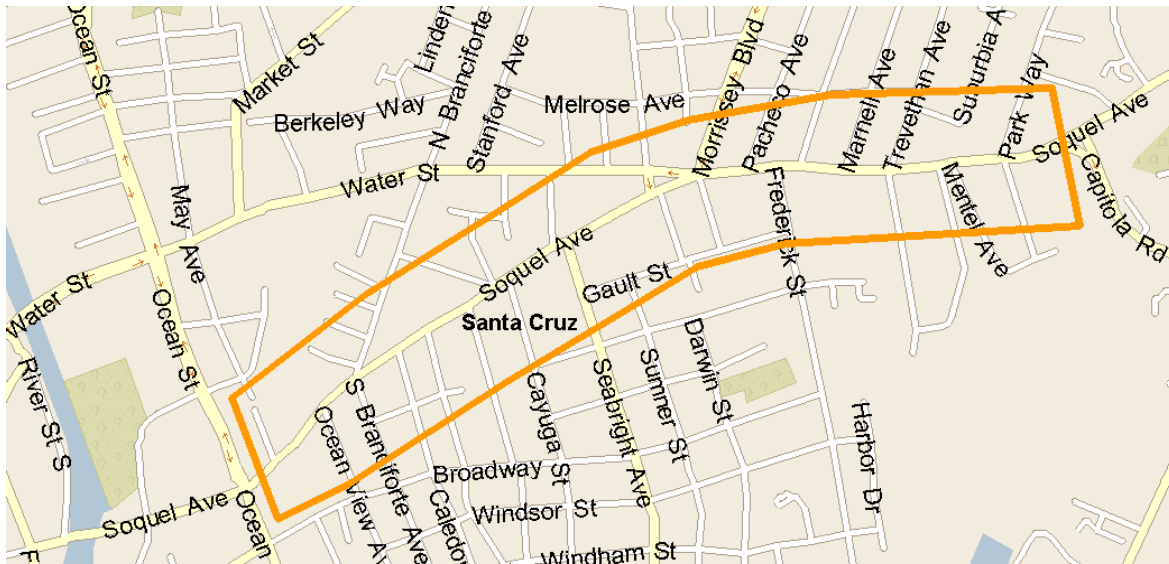


Figure 41: The East commercial area extends 1.5 miles along Soquel Avenue.

Parking

Parking for the retail/restaurant uses in the district is provided by a mix of on-street (parallel) parking and additional parking (for most retailers) behind the stores. A few retailers (Whole Foods/Rite Aid, Safeway, Shoppers Corner, Staff of Life) have dedicated parking lots in front of or next to their stores.

Additional Supportable Retail

This study finds that 60,000 gross square feet of new retail space is supportable along the East Commercial Zone (Soquel Avenue). The supportable retail space will increase the strength of the area as a home accessory hub to complement the existing specialty food store hub currently located along Soquel Avenue. Additional clothing stores featuring vintage or second-hand apparel, as well as some new restaurants, are also supportable and will reinforce Soquel Avenue's unique character. This new retail will generate approximately \$20.3 million in additional annual sales by 2016 and can be implemented by the expansion of existing businesses or with the opening of 15 to 20 new retailers and restaurants.

The supportable retail includes:

- 16,500 square feet of new restaurant space to include restaurants such as Buffalo Wild Wings, a local natural food restaurant, Chipotle or similar burrito café, and a burger restaurant such as Metro Burger or Burgerhouse.
- 22,500 square feet of home accessories such as Urban Ore Recycling, Tuesday Morning, and/or a home consignment center.

-
- 12,000 square feet of vintage/second-hand clothing stores such as Buffalo Exchange, Aardvark's Odd Ark, and/or Jeremy's Clothing Outlet.
 - 5,500-square-foot variety store.
 - 3,500-square-foot vitamin store such as Vitamin Warehouse or Vitamin Shoppe.

Please refer to the Appendix tables for a complete list of recommended retail and restaurants for the East Commercial Zone.

Rationale

The rationale for the supportable tenants is presented below:

Stable Population and Household Base. The neighborhood-oriented trade area has a current population base of 76,400 persons and 29,080 households. The household base is primarily renter-occupied (54 percent rental units) with an average persons-per-household of 2.37. The high renter-occupied base indicates a transient consumer and higher-than-average turnover of households, likely to update/refurbish more often than an owner-occupied household.

Good Close-in Population Base. The population base within one mile of the area offers 21,660 persons, stronger than any of the other identified shopping districts, with the exception of the Central/Pacific Avenue Zone. The close-in base is much older than that of the trade area (37.3 versus 34.4).

Good Income Levels. Income levels in the primary trade area are good, with median household incomes reported as \$69,750 and per-capita incomes reported as \$36,369. Close-in, the incomes are slightly lower (\$61,310 and \$32,630).

Tapestry Lifestyles. Tapestry Lifestyles indicate a strong Urban Chic consumer (44 percent of the household base) followed by Trendsetters (22 percent of the household base.) These lifestyles indicate an older, well-educated consumer that is active physically as well as in their community.

Good Daytime Population Base. The East Commercial Zone is the strongest of all the identified shopping districts, with 37,800 persons. The base is primarily white-collar employed and most (34 percent) are employed in "executive and professional" positions, followed by an additional 26 percent employed in "administrative and support" positions.

Good Local Access. Local access to the area is good, but regional access is limited. Due to distance, the area is the least apt to benefit from both the student base at the University of California and the area's tourist base.

Current Retail Appeal. A strong core of grocery and specialty food retailers, which focus on natural foods, currently anchors the district. There is also a good hub of furniture and home accessory stores in the area. The recommended retail/restaurants should appeal to the existing base and strengthen the retail appeal of the district.



Figure 42: The West commercial area looking east along Mission Street. The area has strong retailers and restaurants, but limited sense of community, branding, walkability and streetscape amenities.

WEST ZONE

The West Commercial Zone extends over two miles along Cabrillo Highway and Mission Street between River and Swift Streets. The corridor is divided into two primary areas; the Highway 1 area (east) and the Mission Street area (west). It is anchored on the east by the Gateway Plaza and Costco, and on the west by Safeway Supermarket and New Leaf Community Market with numerous smaller centers and businesses along the corridor. Other draws to the area include:

- The Tannery Arts Center, a mixed-use development offering 100 lofts of affordable housing for local artists, and the Working Studios, which offer subsidized retail space at 30 to 50 percent of average Santa Cruz rental rates. Additionally, a performing arts center (230 seats) is planned to open this summer.
- Old Sash Mill, a mixed-use commercial center offering low rental rates for local offices, warehousing, and retail space.
- The Swift Street Courtyard-Kelly Bakery complex located at its west end near Swift Street featuring a dozen Santa Cruz vintners' tasting rooms and a brewery.

The east Highway One area has a community shopping center level of service, represented by its Costco and Gateway Plaza shopping center.

The Mission Street / Highway 1 corridor operates primarily at a neighborhood business scale, with several smaller supermarkets, restaurants, and local service businesses.

The following map details the district's boundaries:



Figure 43: Map of the West zone district boundaries.

Access

Local access to the site is good, as provided by Mission Street (CA Highway 1) from the south. Regional access to the area is also good as provided by CA Highway 1 and CA Highway 17 from the north and west. Highway 1 offers four lanes of uncontrolled access traffic to the northwestern City boundary where it becomes two lanes, and four lanes of limited access thoroughway to the east of River Street. Highway 17 flows to the north with four lanes of limited access roadway to Los Gatos, where it converts into Interstate 880 traveling north to San Jose and Oakland.

Highway 1 offers four lanes of traffic throughout the area; however, except on portions of the Mission Street corridor, there are no curb cuts along the highway that would permit direct access to the district's retail. As such, it is assumed that any additional retail in the area would be permitted to have direct access to Highway 1 or require indirect access to this thoroughfare.

Visibility & Streetscape

Visibility of retail located along Highway 1 -Mission Street is good. New retail will need to utilize signage to assure good visibility. Given the area's strong retail mix and surrounding neighborhoods, it lacks the walkability and streetscape considered essential by the shopping center industry.

Parking

Parking for the retail/restaurant uses in the district is provided by the individual centers, with no additional parking provided along Highway 1. On-street parking would improve its urbanism and promote street front retailers but is constrained by state highway design standards on Highway 1.

Traffic Counts

Area traffic counts, as provided by the Santa Cruz Regional Transportation Commission (2006) and the California Department of Transportation (2009), are as follows:

Figure 44: Traffic Counts Table

Roadway:	Location:	Traffic Count:	
		2006	2009
Highway 1	Soquel Drive to Park Avenue	110,000	101,000
	North of Highway 17	57,000	64,000
	North of Mission St	62,000	58,000
Highway 17	North of Route 1	69,000	73,000

The Western Zone is anchored by the Gateway Plaza, which itself is anchored by retailers such as Ross Dress for Less, Pet Smart, Cost Plus and Office Max. The community orientation of the district is strengthened by the close proximity of Costco and a Pro-Build. The area is strengthened with the addition of the Tannery Arts Center, which features 100 new lofts; Working Studios, which offer subsidized gallery space; and a planned new performing arts center. The Old Sash Mill also offers a business incubator format with rents much cheaper than currently found in the nearby downtown district. The current base is eclectic with retail, commercial, and warehouse space.

The area has very good regional and local access, and thus is a good location for development by traditional small- and big-box retailers. This would serve consumers who are currently leaving the Santa Cruz area to shop either north in the Los Gatos/San Jose area or in Watsonville to the south.

Additional Supportable Retail

This study finds that 344,000 of additional (new) gross square feet of new anchor / specialty-box retail is supportable in the Western Zone. Of the West area's \$2.2 billion trade area, GPG estimates that annual sales of \$135.7 million are achievable by 2016. These additional sales would require the development of several large format retailers combined with the expansion of existing businesses or the opening of 30-40 new retailers and restaurants.

There is plenty of market demand for both the Highway 1 and Mission Street corridors to continue to be developed as neighborhood and community-oriented destination retail to address the retail voids in the market. The area could also create a stronger restaurant presence to serve those attending the performing arts center.

The supportable retail includes:



Figure 45: The West Zone's Highway 1 area has a community retail focus with large format retailers such as Costco, Pet Smart and Office Max.

- 135,000 square feet of discount-retail such as Target and TJ Maxx.
- 120,000 square feet of home improvement for an operator such as Lowe's Home Improvement.
- 30,000-square-foot outdoor specialty store such as REI.
- 21,000-square-foot furniture store such as Ethan Allen or La-Z-Boy.
- 14,500 square feet of apparel and shoes such as Old Navy and Famous Footwear.
- 23,500 square feet of new restaurants such as Marie Callendar's or Claim Jumper, Bravo! or Capitol Grill, Black Bear Diner, and Spicy Pickle or Which Wich.

Please refer to the Appendix tables for a complete list of supportable retail and restaurants for the Western Commercial Zone.



Figure 46: The West Zone is anchored with a variety of retailers including a Costco, a new Public Supermarket (above left) and the Swift Street Courtyard's Kelly's French Bakery (above right).

Rationale

The rationale for the above tenants is presented below:

-
- ***Stable Population and Household Base.*** The community-oriented trade area has a current population base of 130,300 persons and 50,400 households. The household base is primarily owner-occupied (51 percent) with an average persons-per-household of 2.42.
 - ***Limited Close-in Population Base.*** The population base within one mile of the area offers only 13,499 persons, the least of all the identified shopping districts. The close-in base has a stronger renter-occupied base (58 percent) and smaller household size (2.32). While the base is lowest of the four identified districts, it is also projected to grow the most (3.6 percent) over the next five-years.
 - ***Good Income Levels.*** Income levels in the community-oriented trade area are good, with median household incomes reported as \$73,810 and per-capita incomes reported as \$37,490. Close-in income levels are lower (\$58,300 and \$33,430) due to the younger/renter base found near the district.
 - ***Tapestry Lifestyles.*** Tapestry Lifestyles indicate a strong Urban Chic consumer (49 percent of the household base) followed by Trendsetters (an additional 14 percent of the household base.) These lifestyles indicate an older, well educated consumer that is physically active and involved in their community.
 - ***Good Daytime Population Base.*** Located within five minutes of the district is a good daytime population base of 32,990 persons. The base is primarily white-collar employed and most (34 percent) are employed in “executive and professional” positions, followed by an additional 27 percent employed in “administrative and support” positions.
 - ***Good Local and Regional Access.*** Good local and regional access to the area enables the district to attract sales from all portions of the defined trade area. The site is also well-positioned to serve both the close-by student population base and the tourist base.
 - ***Current Retail Appeal.*** The district is currently anchored by the existing community-oriented retail in the Santa Cruz market. Additionally, the area has a growing base of subsidized and incubator retail/office/commercial uses nearby, and the appeal will expand when the performing arts centers opens.

- END of STUDY-

Appendix Table 1: Supportable Retail Table
West Zone/Cabrillo Highway

Retail Category	Student Base ('000's)**	Daytime Business ('000's)**	Tourist Potential ('000's)**	2016 Community Trade Area ('000's)**	2016 Total Community Exp. Pot. ('000's)**	Recommended Retail S/F	2016		Retailers Such As:
							Annual Sales	Sales Per S/F	
Department Store	\$1,066	\$2,664	\$406	\$134,508	\$138,238	135,000	\$46,575,000	\$345	Target, T.J. Maxx
Discount Department Warehouse Store	\$2,101	\$5,253	\$800	\$153,795	\$161,148				
Women's Apparel	\$1,675	\$4,187	\$638	\$86,816	\$92,678				
Men's Apparel	\$152	\$381	\$58	\$52,751	\$53,284				
Unisex Apparel	\$1,827	\$4,567	\$696	\$56,158	\$62,552	10,000	\$4,250,000	\$425	Old Navy
Children's Apparel	\$1,188	\$2,969	\$452	\$33,164	\$37,320				
Shoes & Accessories	\$426	\$1,066	\$162	\$30,959	\$32,451	4,500	\$1,350,000	\$300	Famous Footwear
Total Apparel, Shoes & Accessories	\$5,268	\$13,170	\$2,006	\$259,848	\$278,286	14,500	\$5,600,000	\$386	
Grocery	\$537	\$761	\$3,960	\$335,593	\$336,891				
Specialty Food Stores	\$405	\$913	\$2,640	\$58,011	\$59,330				
Alcoholic Beverages	\$107	\$152	\$1,600	\$55,907	\$56,166				
Restaurant W/Liquor	\$12,162	\$35,361	\$11,986	\$86,866	\$134,390	15,000	\$8,625,000	\$575	Marie Callender's or Claim Jumper, Bravol or Capitol Grill
Casual Restaurants	\$18,273	\$53,042	\$7,615	\$62,720	\$134,035	8,500	\$4,207,500	\$495	Black Bear Diner, Spicy Pickle or Which Wich
Total Food & Restaurant	\$31,484	\$90,230	\$27,801	\$599,098	\$720,812	23,500	\$12,832,500	\$546	
Appliances, Computers & Electronics	\$365	\$913	\$139	\$141,822	\$143,100				
Art, Craft, and Sewing Stores	\$609	\$1,522	\$232	\$24,297	\$26,428				
Book & Music Stores	\$1,310	\$3,273	\$499	\$34,115	\$38,699				
Card / Gift Shops	\$2,223	\$5,557	\$1,079	\$22,293	\$30,073				
Drug Store / Pharmaceutical	\$4,873	\$12,180	\$1,856	\$126,993	\$144,046				
Florists	\$61	\$152	\$12	\$16,281	\$16,494				
Health and Beauty Store	\$1,279	\$3,197	\$487	\$70,084	\$74,561				
Furniture, Home Décor & Accessories	\$670	\$1,675	\$255	\$126,392	\$128,737	21,000	\$6,300,000	\$300	Ethan Allen or LaZBoy
Home Improvement	\$365	\$913	\$23	\$43,083	\$44,361	120,000	\$54,600,000	\$455	Lowe's Home Improvement
Jewelry Store	\$1,370	\$3,426	\$522	\$66,377	\$71,173				
Musical Instrument Shops	\$30	\$76	\$2	\$9,969	\$10,075				
Office Supplies	\$244	\$609	\$93	\$15,279	\$16,132				
Optical / Vision Care	\$579	\$1,446	\$220	\$31,711	\$33,736				
Personal Services	\$396	\$990	\$267	\$32,813	\$34,199				
Pet Supply Store	\$274	\$685	\$104	\$29,857	\$30,816				
Photographic Equipment & Developing	\$305	\$761	\$232	\$8,667	\$9,733				
Sporting Goods Store	\$1,036	\$2,588	\$394	\$59,163	\$62,787	30,000	\$9,750,000	\$325	REI
Tobacco Shop	\$640	\$1,599	\$244	\$43,433	\$45,672				
Toy and Hobby Shops	\$761	\$1,903	\$290	\$22,844	\$25,508				
Video / Entertainment	\$3,807	\$9,516	\$1,450	\$21,792	\$35,114				
Total Other Retail	\$21,196	\$52,983	\$8,400	\$947,265	\$1,021,444	171,000	\$70,650,000	\$413	
Total Identified Retail Expenditure & Supportable Retail	\$61,115	\$164,299	\$39,413	\$1,806,211	\$2,319,928	344,000	\$135,657,500	\$394	

** Sales stated in constant (2011) dollars - No adjustment has been made for potential inflation.

Appendix Table 2: Sales Forecast Table
Beach Street/Waterfront District

Retail Category	Student Base ('000's)**	Daytime Business ('000's)**	Tourist Potential ('000's)**	2016 Regional Trade Area ('000's)**	2016 Total Regional Exp. Pot. ('000's)**	Recommended Retail S/F	2016		Retailers Such As:
							Annual Sales	Sales Per S/F	
Department Store	\$1,066	\$2,664	\$406	\$172,659	\$176,389	4,000	\$1,700,000	\$425	Five & Dime General Store
Discount Department/Warehouse Store	\$2,101	\$5,253	\$800	\$197,416	\$204,770				
Women's Apparel	\$1,675	\$4,187	\$638	\$111,441	\$117,302				
Men's Apparel	\$152	\$381	\$58	\$67,713	\$68,246				
Unisex Apparel	\$1,827	\$4,567	\$696	\$72,086	\$78,480				
Children's Apparel	\$1,188	\$2,969	\$452	\$42,570	\$46,727				
Shoes & Accessories	\$426	\$1,066	\$162	\$39,740	\$41,232				
Total Apparel, Shoes & Accessories	\$5,268	\$13,170	\$2,006	\$333,550	\$351,988	0	\$0	\$0	
Grocery	\$537	\$761	\$3,960	\$430,779	\$432,077				
Specialty Food Stores	\$405	\$913	\$2,640	\$74,465	\$75,784				
Alcoholic Beverages	\$107	\$152	\$1,600	\$71,764	\$72,024				
Restaurant/W/Liquor	\$12,162	\$35,361	\$11,986	\$111,505	\$159,028	48,000	\$30,000,000	\$625	Dave & Busters, Hokkaido or Moonstar Seafood Buffet, ESPN Zone, Dick's Last Resort, Blues Café
Casual Restaurants	\$18,273	\$53,042	\$7,615	\$80,510	\$151,825				
Total Food & Restaurant	\$31,484	\$90,230	\$27,801	\$769,023	\$890,737	48,000	\$30,000,000	\$625	
Appliances, Computers & Electronics	\$365	\$913	\$139	\$182,047	\$183,326				
Art, Craft and Sewing Stores	\$609	\$1,522	\$232	\$31,188	\$33,319				
Book & Music Stores	\$1,310	\$3,273	\$499	\$43,792	\$48,375				
Card / Gift Shops	\$2,223	\$5,557	\$1,079	\$28,616	\$36,396				
Drug Store / Pharmaceutical	\$4,873	\$12,180	\$1,856	\$163,013	\$180,066				
Florists	\$61	\$152	\$12	\$20,899	\$21,112				
Health and Beauty Store	\$1,279	\$3,197	\$487	\$89,963	\$94,439				
Furniture, Home Décor & Accessories	\$670	\$1,675	\$255	\$162,242	\$164,586				
Home Improvement	\$365	\$913	\$23	\$55,302	\$56,581				
Jewelry Store	\$1,370	\$3,426	\$522	\$85,204	\$90,000				
Musical Instrument Shops	\$30	\$76	\$2	\$12,797	\$12,903				
Office Supplies	\$244	\$609	\$93	\$19,613	\$20,466				
Optical / Vision Care	\$579	\$1,446	\$220	\$40,705	\$42,730				
Personal Services	\$396	\$990	\$267	\$42,120	\$43,505				
Pet Supply Store	\$274	\$685	\$104	\$38,326	\$39,285				
Photographic Equip. & Devel.	\$305	\$761	\$232	\$11,125	\$12,191				
Sporting Goods Store	\$1,035	\$2,588	\$394	\$75,944	\$79,567				
Tobacco Shop	\$640	\$1,599	\$244	\$55,752	\$57,991				
Toy and Hobby Shops	\$761	\$1,903	\$290	\$29,323	\$31,987				
Video / Entertainment	\$3,807	\$9,516	\$1,450	\$27,973	\$41,295	35,000	\$6,125,000	\$175	Van's Skatepark
Total Other Retail	\$21,196	\$52,983	\$8,400	\$1,215,943	\$1,290,122	35,000	\$6,125,000	\$175	
Total Identified Retail Expenditure & Supportable Retail	\$61,115	\$164,299	\$39,413	\$2,318,517	\$2,914,006	87,000	\$7,825,000	\$435	

** Sales stated in constant (2011) dollars - No adjustment has been made for potential inflation.

Appendix Table 3: Sales Forecast Table
Pacific Avenue/Downtown District

Retail Category	Student Base (‘000’s)**	Daytime Business (‘000’s)**	Tourist Potential (‘000’s)**	2016 Regional Trade Area (‘000’s)**	2016 Total Regional Exp. Pot. (‘000’s)**	Recommended Retail S/F	2016		Retailers Such As:
							Annual Sales	Sales Per S/F	
Department Store	\$1,066	\$2,664	\$406	\$172,659	\$176,389	25,000	\$10,625,000	\$425	Nordstrom Rack
Discount Department/Warehouse Store	\$2,101	\$5,253	\$800	\$197,416	\$204,770				
Women's Apparel	\$1,675	\$4,187	\$638	\$111,441	\$117,302	18,000	\$8,550,000	\$475	Forever 21, dELIA's, Fresh Produce
Men's Apparel	\$152	\$381	\$58	\$67,713	\$68,246				
Unisex Apparel	\$1,827	\$4,567	\$696	\$72,086	\$78,480	12,500	\$5,312,500	\$425	Convent Organic Apparel, Two Star Dog, Bancroft Clothing Co., Life is Good
Children's Apparel	\$1,188	\$2,969	\$452	\$42,570	\$46,727	2,000	\$750,000	\$375	This Little Piggy Wears Cotton
Shoes & Accessories	\$426	\$1,066	\$162	\$39,740	\$41,232	2,000	\$850,000	\$425	Road Runner Sports
Total Apparel, Shoes & Accessories	\$5,268	\$13,170	\$2,006	\$333,550	\$351,988	34,500	\$15,462,500	\$448	
Grocery	\$537	\$761	\$3,960	\$430,779	\$432,077				
Specialty Food Stores	\$405	\$913	\$2,640	\$74,465	\$75,784				
Alcoholic Beverages	\$107	\$152	\$1,600	\$71,764	\$72,024	4,500	\$2,227,500	\$495	Local winery outlet
Restaurant/W/Liquor	\$12,162	\$35,361	\$11,986	\$111,505	\$159,028				
Casual Restaurants	\$18,273	\$53,042	\$7,615	\$80,510	\$151,825	12,500	\$4,937,500	\$395	5 Guys Burgers, Fatburger or Smash Burger, Voodoo BBQ Grill, Maui Taco's, Pei Wei
Total Food & Restaurant	\$31,484	\$90,230	\$27,801	\$769,023	\$890,737	17,000	\$7,165,000	\$421	
Appliances, Computers & Electronics	\$365	\$913	\$139	\$182,047	\$183,326	4,500	\$6,975,000	\$1,550	Apple Computers
Art, Craft, and Sewing Stores	\$609	\$1,522	\$232	\$31,188	\$33,319	2,000	\$500,000	\$250	Beadworks,
Book & Music Stores	\$1,310	\$3,273	\$499	\$43,792	\$48,375				
Card / Gift Shops	\$2,223	\$5,557	\$1,079	\$28,616	\$36,396	2,000	\$590,000	\$295	Ideal Stationers
Drug Store / Pharmaceutical	\$4,873	\$12,180	\$1,856	\$163,013	\$180,066				
Florists	\$61	\$152	\$12	\$20,899	\$21,112				
Health and Beauty Store	\$1,279	\$3,197	\$487	\$89,963	\$94,439				
Furniture, Home Decor & Accessories	\$670	\$1,675	\$255	\$162,242	\$164,586				
Home Improvement	\$365	\$913	\$23	\$55,302	\$56,581				
Jewelry Store	\$1,370	\$3,426	\$522	\$85,204	\$90,000				
Musical Instrument Shops	\$30	\$76	\$2	\$12,797	\$12,903				
Office Supplies	\$244	\$609	\$93	\$19,613	\$20,466				
Optical / Vision Care	\$579	\$1,446	\$220	\$40,705	\$42,730	2,000	\$770,000	\$385	Oakley or similar
Personal Services	\$396	\$990	\$267	\$42,120	\$43,505				
Pet Supply Store	\$274	\$685	\$104	\$38,326	\$39,285				
Photographic Equipment & Developing	\$305	\$761	\$232	\$11,125	\$12,191				
Sporting Goods Store	\$1,035	\$2,588	\$394	\$75,944	\$79,567	4,500	\$1,777,500	\$395	Any Mountain
Tobacco Shop	\$640	\$1,599	\$244	\$55,752	\$57,991				
Toy and Hobby Shops	\$761	\$1,903	\$290	\$29,323	\$31,987				
Video / Entertainment	\$3,807	\$9,516	\$1,450	\$27,973	\$41,295				
Total Other Retail	\$21,196	\$52,983	\$8,400	\$1,215,943	\$1,290,122	15,000	\$10,612,500	\$708	
Total Identified Retail Expenditure & Supportable Retail	\$61,115	\$164,299	\$39,413	\$2,318,517	\$2,914,006	91,500	43,865,000	\$479	

** Sales stated in constant (2011) dollars - No adjustment has been made for potential inflation.

Appendix Table 4: Sales Forecast Table
East Zone/Soquel Avenue

Retail Category	Student Base ('000's)**	Daytime Business ('000's)**	Tourist Potential ('000's)**	2016 Primary Trade Area ('000's)**		2016 Primary Exp. Pot. ('000's)**	Recommended Retail S/F	2016		Retailers Such As:
								Annual Sales	Sales Per S/F	
Department Store	\$1,066	\$2,664	\$406	\$77,575	\$81,305	\$86,052	5,500	\$1,787,500	\$325	Dollar Tree
Discount Department/Warehouse Store	\$2,101	\$5,253	\$800	\$88,698	\$96,052					
Women's Apparel	\$1,675	\$4,187	\$638	\$50,070	\$55,932					
Men's Apparel	\$152	\$381	\$58	\$30,423	\$30,956					
Unisex Apparel	\$1,827	\$4,567	\$696	\$32,388	\$38,782		12,000	\$3,780,000	\$315	Buffalo Exchange or Aardvark's Odd Ark, Jeremy's Clothing Outlet
Children's Apparel	\$1,188	\$2,969	\$452	\$19,127	\$23,283					
Shoes & Accessories	\$426	\$1,066	\$162	\$17,855	\$19,347					
Total Apparel, Shoes & Accessories	\$5,268	\$13,170	\$2,006	\$149,863	\$168,300		12,000	\$3,780,000	\$315	
Grocery	\$537	\$761	\$3,960	\$193,548	\$194,846					
Specialty Food Stores	\$405	\$913	\$2,640	\$33,457	\$34,775					
Alcoholic Beverages	\$107	\$152	\$1,600	\$32,243	\$32,503					
Restaurant W/Liquor	\$12,162	\$35,361	\$11,986	\$50,099	\$97,622		4,500	\$2,632,500	\$585	Wild Buffalo Wings
Casual Restaurants	\$18,273	\$53,042	\$7,615	\$36,173	\$107,488		12,000	\$4,500,000	\$375	local natural food rest, Chipotle or similar, Metro Burger or Burgerhouse
Total Food & Restaurant	\$31,484	\$90,230	\$27,801	\$345,519	\$467,233		16,500	\$7,132,500	\$0	
Appliances, Computers & Electronics	\$366	\$913	\$139	\$81,793	\$83,072					
Art, Craft, and Sewing Stores	\$609	\$1,522	\$232	\$14,013	\$16,144					
Book & Music Stores	\$1,310	\$3,273	\$499	\$19,675	\$24,259					
Card / Gift Shops	\$2,223	\$5,557	\$1,079	\$12,857	\$20,637					
Drug Store / Pharmaceutical	\$4,873	\$12,180	\$1,856	\$73,241	\$90,294		3,500	\$1,137,500	\$325	Vitamin Warehouse or Vitamin Shoppe
Florists	\$61	\$152	\$12	\$9,390	\$9,603					
Health and Beauty Store	\$1,279	\$3,197	\$487	\$40,420	\$44,896					
Furniture, Home Decorating & Accessories	\$670	\$1,675	\$255	\$72,895	\$75,239		22,500	\$6,412,500	\$285	Urban Ore Recycling, Tuesday Morning, Home consignment center
Home Improvement	\$365	\$913	\$23	\$24,847	\$26,126					
Jewelry Store	\$1,370	\$3,426	\$522	\$38,282	\$43,078					
Musical Instrument Shops	\$30	\$76	\$2	\$5,750	\$5,856					
Office Supplies	\$244	\$609	\$93	\$8,812	\$9,665					
Optical / Vision Care	\$579	\$1,446	\$220	\$18,289	\$20,314					
Personal Services	\$396	\$990	\$267	\$18,924	\$20,310					
Pet Supply Store	\$274	\$685	\$104	\$17,220	\$18,179					
Photographic Equipment & Developing	\$305	\$761	\$232	\$4,998	\$6,065					
Sporting Goods Store	\$1,035	\$2,588	\$394	\$34,121	\$37,745					
Tobacco Shop	\$640	\$1,599	\$244	\$25,049	\$27,288					
Toy and Hobby Shops	\$761	\$1,903	\$290	\$13,175	\$15,839					
Video / Entertainment	\$3,807	\$9,516	\$1,450	\$12,568	\$25,891					
Total Other Retail	\$21,196	\$52,983	\$8,400	\$546,319	\$620,498		26,000	\$7,550,000	\$290	
Total Identified Retail Expenditure & Supportable Retail	\$61,115	\$164,299	\$39,413	\$1,041,701	\$1,433,389		60,000	20,250,000	\$338	

** Sales stated in constant (2011) dollars - No adjustment has been made for potential inflation.

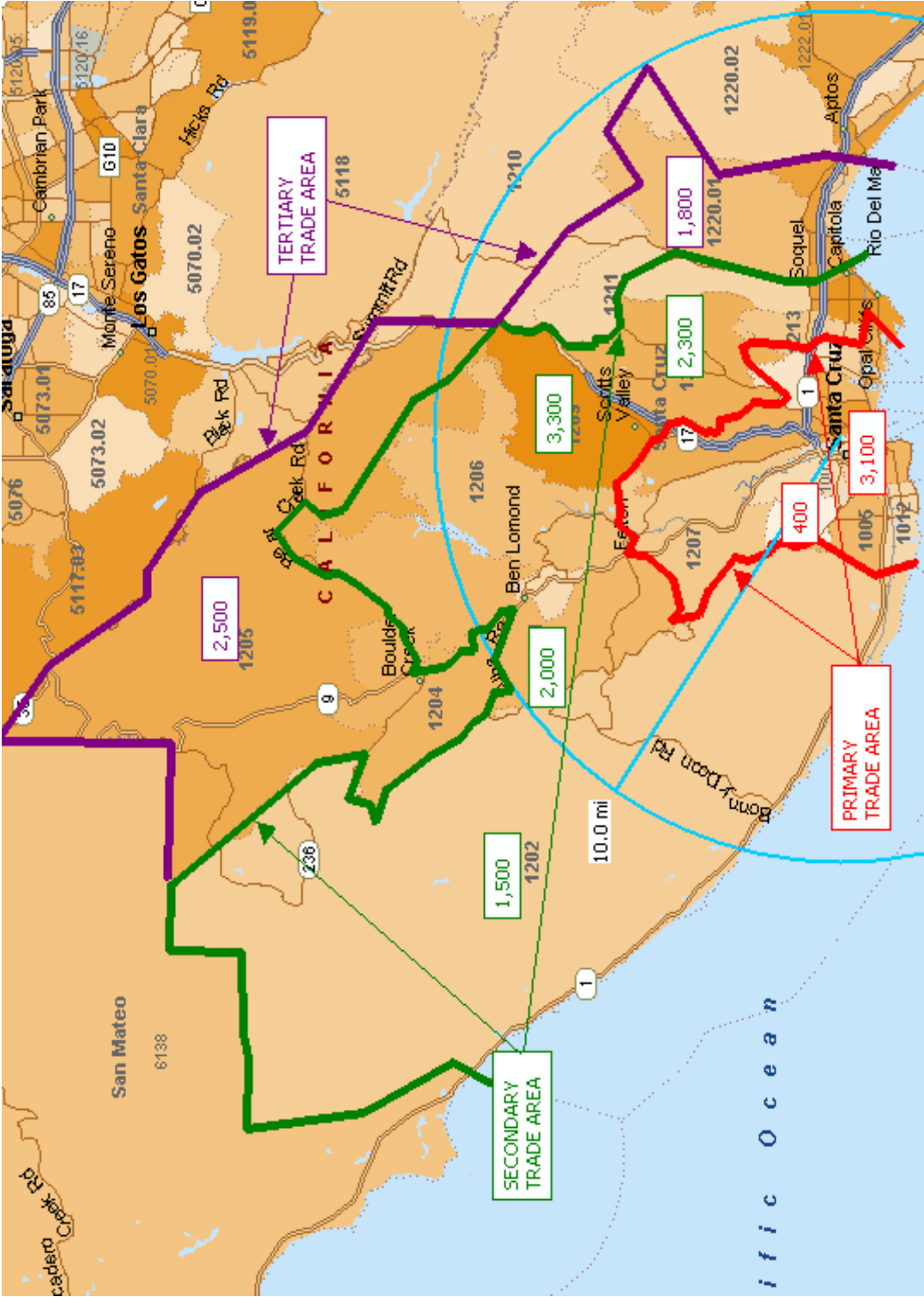
Appendix Table 5: Retail Expenditure Potential
Santa Cruz, California

Retail Category	Student Base ('000's)**	Daytime Business ('000's)**	Tourist Potential ('000's)**	2011			2016			2016 Total		Residential Market Index* to USA 2011
				Primary Trade Area ('000's)**	Community Trade Area ('000's)**	Regional Trade Area ('000's)**	Primary Trade Area ('000's)**	Community Trade Area ('000's)**	Regional Trade Area ('000's)**	Primary Exp. Pot. ('000's)**	Community Exp. Pot. ('000's)**	
Department Store	\$1,066	\$2,664	\$406	\$72,324	\$125,342	\$161,001	\$77,575	\$134,508	\$172,659	\$81,305	\$138,238	105
Discount Department/ Warehouse Store	\$2,101	\$2,253	\$800	\$86,807	\$150,441	\$193,240	\$68,698	\$153,795	\$197,416	\$66,052	\$161,148	109
Women's Apparel	\$1,675	\$4,187	\$638	\$45,657	\$79,126	\$101,637	\$50,070	\$86,816	\$111,441	\$55,932	\$92,678	122
Men's Apparel	\$152	\$381	\$58	\$26,027	\$45,107	\$57,940	\$30,423	\$52,751	\$67,713	\$30,956	\$53,284	126
Unisex Apparel	\$1,827	\$4,567	\$696	\$32,949	\$57,102	\$73,347	\$32,388	\$56,158	\$72,086	\$38,782	\$62,552	145
Children's Apparel	\$1,188	\$2,969	\$452	\$16,838	\$29,181	\$37,483	\$19,127	\$33,164	\$42,570	\$23,283	\$37,320	96
Shoes & Accessories	\$426	\$1,066	\$162	\$15,965	\$27,669	\$35,541	\$17,855	\$30,959	\$39,740	\$19,347	\$32,451	108
Total Apparel, Shoes & Accessories	\$5,268	\$13,170	\$2,006	\$137,437	\$238,186	\$305,947	\$149,863	\$259,848	\$333,550	\$168,300	\$278,286	\$351,988
Grocery	\$537	\$761	\$3,960	\$88,910	\$27,392	\$420,532	\$193,548	\$335,593	\$430,779	\$194,846	\$336,891	113
Specialty Food Stores	\$405	\$913	\$2,640	\$32,891	\$57,001	\$73,218	\$33,457	\$58,011	\$74,465	\$34,775	\$59,330	125
Alcoholic Beverages	\$107	\$152	\$1,600	\$31,466	\$54,532	\$70,045	\$32,243	\$55,907	\$71,764	\$32,503	\$56,166	125
Restaurant W/Liquor	\$12,162	\$35,361	\$11,986	\$48,594	\$84,217	\$108,176	\$90,099	\$86,866	\$111,506	\$97,622	\$134,390	128
Casual Restaurants	\$18,273	\$53,042	\$7,615	\$35,101	\$60,832	\$78,138	\$62,720	\$80,510	\$80,510	\$134,035	\$151,825	123
Total Food & Restaurant	\$31,484	\$90,230	\$27,801	\$336,962	\$583,973	\$750,108	\$345,519	\$599,098	\$789,023	\$467,233	\$720,812	\$890,737
Appliances, Computers & Electronics	\$365	\$913	\$139	\$58,744	\$101,806	\$130,769	\$61,793	\$141,822	\$182,047	\$83,072	\$143,100	135
Art, Craft and Sewing Stores	\$609	\$1,522	\$232	\$12,505	\$21,672	\$27,837	\$14,013	\$24,297	\$31,188	\$16,144	\$26,428	98
Book & Music Stores	\$1,310	\$2,273	\$498	\$18,234	\$31,600	\$40,590	\$19,675	\$34,115	\$43,792	\$24,259	\$38,699	147
Card / Gift Shops	\$2,223	\$5,557	\$1,079	\$12,784	\$22,155	\$28,458	\$12,857	\$22,293	\$28,616	\$20,637	\$30,073	138
Drug Store / Pharmaceutical	\$4,873	\$12,180	\$1,856	\$66,799	\$115,767	\$148,701	\$73,241	\$126,993	\$163,013	\$90,294	\$144,046	94
Florists	\$61	\$152	\$12	\$9,190	\$15,926	\$20,457	\$9,390	\$16,281	\$20,899	\$9,603	\$16,494	115
Health and Beauty Store	\$1,279	\$3,197	\$487	\$36,468	\$63,200	\$81,180	\$40,420	\$70,084	\$89,963	\$44,896	\$74,561	135
Furniture, Home Décor & Accessories	\$670	\$1,675	\$255	\$66,188	\$114,708	\$147,341	\$72,895	\$126,392	\$162,242	\$75,239	\$128,737	118
Home Improvement	\$365	\$913	\$23	\$24,951	\$43,242	\$55,544	\$24,847	\$43,083	\$55,302	\$26,126	\$44,361	117
Jewelry Store	\$1,370	\$3,426	\$522	\$37,049	\$64,208	\$82,475	\$38,282	\$66,377	\$85,204	\$43,078	\$71,173	125
Musical Instrument Shops	\$30	\$76	\$2	\$5,438	\$9,425	\$12,106	\$5,750	\$9,969	\$12,797	\$5,856	\$10,075	120
Office Supplies	\$244	\$609	\$93	\$8,794	\$15,241	\$19,576	\$8,812	\$15,279	\$19,613	\$9,665	\$16,132	112
Optical / Vision Care	\$579	\$1,446	\$220	\$18,402	\$31,892	\$40,966	\$18,289	\$31,711	\$40,705	\$20,314	\$33,736	128
Personal Services	\$396	\$990	\$267	\$17,885	\$30,995	\$39,813	\$18,924	\$32,813	\$42,120	\$20,310	\$34,199	132
Pet Supply Store	\$274	\$685	\$104	\$16,937	\$29,352	\$37,703	\$17,220	\$29,857	\$38,326	\$18,179	\$30,816	115
Photographic Equipment & Developing	\$305	\$761	\$232	\$4,013	\$6,955	\$8,934	\$4,998	\$8,667	\$11,125	\$6,065	\$9,733	131
Sporting Goods Store	\$1,035	\$2,588	\$394	\$31,786	\$55,086	\$70,758	\$34,121	\$59,163	\$75,944	\$37,745	\$62,787	129
Tobacco Shop	\$640	\$1,598	\$244	\$23,672	\$41,025	\$52,696	\$25,049	\$43,433	\$55,752	\$27,288	\$45,672	86
Toy and Hobby Shops	\$761	\$1,903	\$290	\$12,970	\$22,478	\$28,873	\$13,175	\$22,844	\$29,323	\$15,839	\$25,508	98
Video / Entertainment	\$3,807	\$9,516	\$1,450	\$12,621	\$21,873	\$28,096	\$12,568	\$21,792	\$27,973	\$25,891	\$35,114	121
Total Other Retail	\$21,196	\$52,983	\$8,400	\$495,430	\$858,607	\$1,102,872	\$546,319	\$947,265	\$1,215,943	\$620,498	\$1,021,444	\$1,290,122
Total Identified Retail Expenditure	\$61,115	\$164,299	\$39,413	\$989,828	\$1,680,766	\$2,158,827	\$1,041,701	\$1,806,211	\$2,318,517	\$1,433,389	\$2,319,928	\$2,914,006

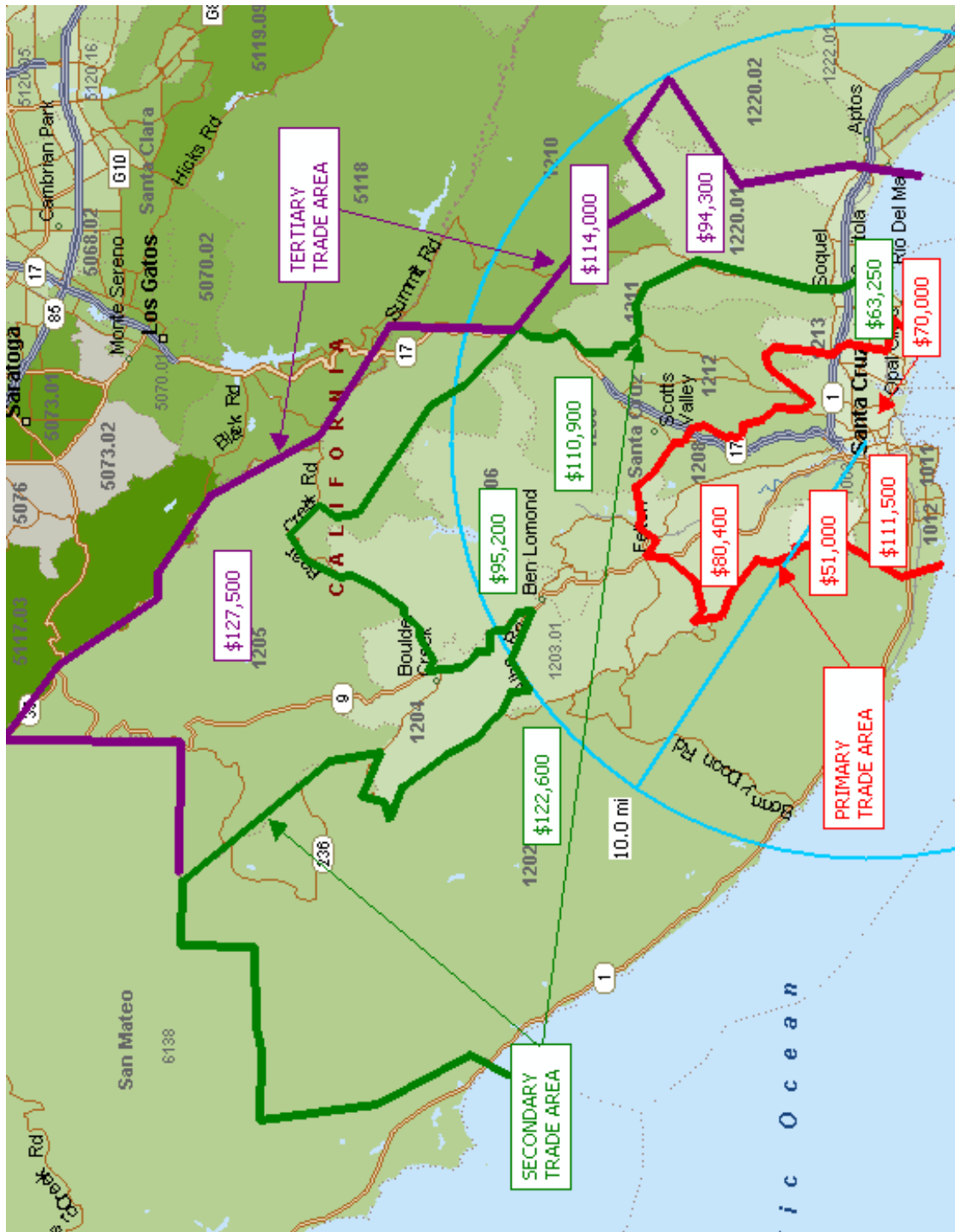
* Market Index as compared to the US average, where the US average is 100. - Source: Claritas, Inc.
** Expenditure potentials stated in constant (2011) dollars - No adjustment has been made for potential inflation.

from.
trade areas include areas outside

POPULATION by CENSUS MAP



HOUSEHOLDS by CENSUS TRACT MAP



AVERAGE HOUSEHOLD INCOME by CENSUS TRACT MAP

Appendix Table 6: Reported Sales Tax - Select Areas Santa Cruz

Retail Category	Downtown		Sequel Avenue		River Street		Beach Area		Mission Street		Totals		Incl/ Dec
	2009	2010	2009	2010	2009	2010	2009	2010	2009	2010	2009	2010	
Specialty Stores	\$34,959	\$35,595	\$9,539	\$13,213	\$87,009	\$84,576	\$1,672	\$946			\$133,179	\$134,330	1%
Variety Stores							\$380	\$214	\$373	\$147	\$753	\$361	-52%
Women's Apparel	\$47,471	\$41,435	\$9,359	\$8,011			\$21,046	\$18,676			\$77,876	\$68,122	-13%
Men's Apparel	\$1,200	\$1,813	\$79,393	\$85,484			\$0	\$0	\$479	\$431	\$81,072	\$87,728	8%
Family Apparel	\$146,038	\$136,950	\$259	\$160	\$85,461	\$90,706	\$0	\$234			\$231,758	\$228,050	-2%
Shoe Stores	\$50,869	\$51,972	\$0	\$0							\$50,869	\$51,972	2%
Second Hand Stores	\$17,496	\$18,626	\$997	\$847			\$83	\$0	\$0	\$18,626	\$18,576	\$38,099	105%
Total Apparel, Shoes & Access:	\$263,074	\$250,796	\$90,008	\$94,502	\$85,461	\$90,706	\$21,129	\$18,910	\$479	\$19,057	\$460,151	\$473,971	3%
Grocery Stores / Beer Wine Only	\$16,562	\$47,239	\$17,792	\$17,165			\$3,383	\$3,136	\$34,628	\$18,242	\$72,365	\$85,782	19%
Grocery Stores / Liquor	\$59,675	\$55,015	\$86,354	\$152,413			\$718	\$655	\$106,692	\$85,184	\$253,439	\$293,267	16%
Food Stores / Non Grocery	\$8,739	\$10,511	\$54,263	\$50,506			\$1,314	\$1,246	\$59	\$0	\$64,375	\$62,263	-3%
Candy Store			\$315	\$104					\$6,082	\$6,484	\$6,397	\$6,588	3%
Package Liquor Stores	\$97,798	\$24,611	\$1,689	\$4,245			\$5,771	\$6,810	\$8,324	\$7,532	\$113,582	\$43,198	-62%
Restaurants Beer and Wine	\$157,318	\$146,284	\$81,827	\$82,153			\$80,710	\$87,337	\$92,510	\$79,707	\$412,365	\$395,481	-4%
Restaurants / Liquor	\$611,463	\$209,079	\$27,763	\$25,131			\$178,950	\$176,819	\$19,281	\$19,790	\$837,457	\$430,819	-49%
Clubs / Amusements							\$83,871	\$25,719			\$83,871	\$25,719	-69%
Restaurants No Alcohol	\$67,460	\$68,171	\$44,644	\$44,284	\$4,049	\$3,394	\$34	\$304	\$65,860	\$82,346	\$182,047	\$198,499	9%
Total Food & Restaurants:	\$1,019,015	\$560,910	\$314,647	\$376,001	\$4,049	\$3,394	\$354,751	\$302,026	\$333,436	\$299,285	\$2,025,898	\$1,541,616	-24%
Art/ Gift/Novelty Stores	\$11,657	\$9,139	\$11,670	\$9,981			\$55,961	\$56,993	\$826	\$5	\$80,114	\$76,118	-5%
Drug Stores	\$90,485	\$80,661							\$91,911	\$82,351	\$182,396	\$163,012	-11%
Electronics	\$28,448	\$31,110	\$71,079	\$95,372	\$3,626	\$3,339					\$103,153	\$129,821	26%
Florists	\$1,543	\$1,295	\$0	\$194							\$1,543	\$1,489	-3%
Hardware Building Materials			\$22,804	\$15,082							\$22,804	\$15,082	-34%
Hardware Paint/ Glass Wallpaper			\$2,873	\$3,984							\$2,873	\$3,984	39%
HardwareGarden/ Agricultural													
Supplies	\$3,887	\$3,171							\$11,512	\$11,564	\$15,399	\$14,735	-4%
Home Furnishing	\$19,546	\$19,862	\$37,338	\$27,708	\$65,686	\$54,639					\$122,570	\$102,209	-17%
Home Furnishing/Textiles			\$0	\$12,926					\$902	\$883	\$902	\$13,809	1431%
Jewelry Stores	\$39,058	\$38,497	\$2,063	\$2,028			\$0	\$12,296			\$41,121	\$52,821	28%
Music Stores	\$36,678	\$26,146	\$181	\$1,284					\$6,303	\$6,626	\$43,162	\$34,056	-21%
Office Supplies	\$7,947	\$3,047	\$6,992	\$2,028	\$61,681	\$56,717					\$76,620	\$61,792	-19%
Personal Service / No Liquor	\$9,594	\$7,380	\$1,908	\$6,305			\$1,251	\$1,214	\$47	\$5	\$12,800	\$14,904	16%
Sporting Goods / Bicycles	\$47,211	\$48,014	\$18,824	\$26,404	\$5,061	\$4,440	\$18,171	\$17,225	\$34,305	\$30,019	\$123,572	\$126,102	2%
Stationary / Book Stores	\$132,054	\$121,862	\$321	\$2,389							\$132,375	\$124,251	-6%
Tobacco Stores	\$7,406	\$7,532	\$26,761	\$31,679							\$34,167	\$39,211	15%
Total Other Retail:	\$435,514	\$397,716	\$202,814	\$237,364	\$136,054	\$119,135	\$75,383	\$87,728	\$145,806	\$131,453	\$995,571	\$973,396	-2%
Total Identified Retail	\$1,752,562	\$1,245,017	\$617,008	\$721,080	\$312,573	\$297,811	\$453,315	\$409,824	\$480,094	\$449,942	\$3,615,552	\$3,123,674	-14%

Note: The defined trade area boundaries are larger than the city's boundaries, where the sales tax data is derived from. The primary trade area (defined for the east commercial zone) does not include the entire City and the other two trade areas include areas outside of the city.

Appendix Table 7: Shopping Center Competition

Map ID	Center Name	Address	City	GLA	Anchor Tenant	Anchor GLA	Apparel & Access.	Food & Rest.	Personal Services	Financial Services	Other Retail	Vacancies	Total Ancillary
Regional Shopping Centers:													
R1	Capitola Mall	1855 41st Ave	Capitola	487,970	Kohl's Macy's Sears	75,000 101,600 115,000	34	16	7	3	17	8	85
Lifestyle Shopping Centers													
L1	Santa Cruz CBD	Pacific Ave	Santa Cruz	N/A	Santa Cruz Bookstore Regal Cinema 9 DelMar Theater	N/A N/A N/A	47	82	16	8	41	7	201
L2	Capitola Village	Capitola Dr & San Jose	Capitola	N/A	Wharf House	N/A	20	30	6	2	32	2	92
Community Shopping Centers													
C1	Gateway Plaza	490-650 River St	Santa Cruz	119,247	Cost Plus World Market Office Max Ross Dress for Less PetSmart	21,000 18,500 32,000 24,500	0	3	1	2	3	1	10
C2	Scotts Valley Square Shopping Center	266 Mount Hermon Rd	Scotts Valley	86,120	Knart	67,000	1	2	7	0	3	2	15
C3	Brown Ranch Marketplace	3555 Clares St	Capitola	103,150	Bed Bath & Beyond Fresh Choice Trader Joes	35,000 39,500 12,750	2	4	6	2	3	2	19
C4	Redwood Center	41st Ave & Rte 1	Capitola	240,000	Best Buy Home Depot Safeway	45,000 109,000 60,000	0	5	4	3	2	0	14
C5	Kings Plaza Shopping Center	1475 41st Ave	Capitola	139,132	Orchard Supply RiteAid SaveMart	37,000 18,500 42,000	1	6	3	1	1	0	12
C6	UnNamed Center	Commercial Ave	Capitola	49,500	Toys/Babies R Us Marshall's	42,000 37,500	0	0	0	0	0	0	0
Neighborhood Shopping Centers													
N1	Riverfront Center	River Ave & Soquel	Santa Cruz	63,000	Trader Joes Regal Cinema 2 CVS	13,000 N/A 19,000	0	2	2	1	2	0	7
N2	Sequel Ocean Center	Soquel & Ocean Ave	Santa Cruz	45,000	Radio Shack	6,500	0	1	3	2	1	2	9
N3	UnNamed center	Soquel & Pine	Santa Cruz	63,500	Whole Foods RiteAid	39,500 17,000	0	2	1	0	1	0	4

Map ID	Center Name	Address	City	GLA	Anchor Tenant	Anchor GLA	Apparel & Access.	Food & Rest.	Personal Services	Financial Services	Other Retail	Vacancies	Total Ancillary
N4	UnNamed center	Mission & Miguel	Santa Cruz	75,000	Ace Hardware Safeway	12,300 60,000	0	3	3	3	1	1	11
N5	Felton Fair	6255 Graham Hill	Felton	79,830	Safeway RiteAid	42,900 18,600	0	3	3	1	1	1	9
N6	Kings Village	222 Mount Hermon Rd	Scotts Valley	199,000	Nob Hill Foods Ace Hardware	38,500 12,800	0	8	4	2	4	2	20
N7	Safeway Center	255-257 Mt Hermon Rd	Scotts Valley	73,975	CVS Safeway	17,500 47,700	2	5	12	3	4	0	26
N8	Scotts Valley Junction	Scotts Valey Dr & Victor	Scotts Valley	60,900	Scotts Valley Market	35,000	0	7	1	1	0	2	11
N9	Capitola Station	41st Ave & Capitola Dr	Capitola	90,000	Whole Foods CVS Bev-Mo	42,000 18,000 15,000	0	4	2	0	1	0	7
N10	Nob Hill Center	Bay & Hill Streets	Capitola	71,000	Nob Hill CVS	45,000 18,300	0	4	4	2	2	2	14
Major Free-standing Competition													
C	Costco	220 Sylvania Ave	Santa Cruz										
PB	ProBuilder Home/Garden Center	River Rd	Santa Cruz										
S	Safeway	117 Morrissey Blvd	Santa Cruz										
NL	New Leaf Community Market	1101 Fair Ave	Santa Cruz										
SL	Staff of Life	Soquel & Darwin	Santa Cruz										
CS	Cornerstore Market	Soquel & Branciforte	Santa Cruz										

Appendix Table 8: Workplace Population 2010 Report

Description	<i>West Zone</i>	<i>East Zone</i>	<i>Central Zone</i>	<i>Waterfront Zone</i>
	<i>Cabrillo Highway</i>	<i>Soquel Avenue</i>	<i>Pacific Avenue</i>	<i>Beach Street</i>
	5 Minute(s) Drive Time 1	5 Minute(s) Drive Time 1	5 Minute(s) Drive Time 1	5 Minute(s) Drive Time 1
Total Employment	32,987	37,779	33,621	28,523
Executive and Professional	11,245	12,664	11,432	9,602
Management	2,430	2,745	2,469	2,069
Sales and Marketing	3,651	4,070	3,719	3,080
Health-Legal-Social	1,991	2,489	2,061	1,782
Engineer-Science-Computer Professional	1,051	1,081	1,046	871
Educators	1,402	1,515	1,413	1,183
Journalists-Creative Professional	720	763	723	615
Administration and Support	8,769	10,143	8,903	7,489
Management Support	1,313	1,432	1,316	1,158
Admin-Clerical Support	6,240	7,169	6,340	5,305
Technical Support	1,216	1,542	1,247	1,025
Service Personnel	6,602	7,626	6,829	6,384
Health Care Personnel	378	707	416	341
Food and Beverage	4,065	4,441	4,229	4,054
Personal Services	1,428	1,685	1,451	1,324
Protective Services	731	793	733	665
Trade and Labor	6,372	7,346	6,456	5,048
Construction	837	1,003	828	586
Installation and Repair	2,013	2,428	2,047	1,749
Craft Production	490	511	480	313
Machine Operators	488	493	499	370
Assemblers	311	276	308	182
Transportation	900	1,018	942	800
Agriculture	496	621	494	398
Laborers	836	997	857	651

Appendix Table 9: POPULATION, HOUSEHOLD AND MARITAL STATUS

Census Tract	Est 2011 Pop	Proj 2016 Pop	Proj 5 Year Growth	Est 2011 Hholds	Proj 2016 Hholds	Proj 5 Year Growth	% Owner Occupied	% Seasonal Hholds	Hhold Size	% Single Male	% Single Female	% Married
1.00	2,206	2,191	-1%	829	826	0%	73.2%	5.8%	2.57	19%	21%	60%
2.00	7,003	6,933	-1%	2,539	2,512	-1%	46.8%	4.6%	2.60	30%	29%	41%
3.00	2,958	2,959	0%	1,141	1,145	0%	69.2%	6.8%	2.46	21%	23%	56%
4.00	4,470	4,457	0%	417	413	-1%	25.5%	4.4%	2.42	33%	43%	24%
5.00	4,871	4,829	-1%	2,026	2,015	-1%	52.0%	4.4%	2.39	25%	29%	46%
6.00	3,181	3,169	0%	1,282	1,280	0%	60.0%	3.0%	2.48	25%	30%	45%
7.00	1,781	1,744	-2%	907	887	-2%	27.4%	9.1%	1.80	36%	32%	32%
8.00	6,638	6,550	-1%	2,769	2,734	-1%	26.6%	7.0%	2.39	35%	33%	32%
9.00	4,206	4,143	-1%	1,991	1,969	-1%	35.4%	11.8%	2.09	27%	33%	40%
10.00	8,027	8,029	0%	3,120	3,119	0%	18.4%	9.4%	2.37	35%	34%	31%
11.00	5,309	5,245	-1%	2,188	2,171	-1%	51.6%	7.4%	2.42	29%	31%	40%
12.00	2,966	2,994	1%	1,160	1,177	1%	64.9%	9.2%	2.49	23%	28%	49%
207.00	5,426	5,419	0%	1,706	1,709	0%	53.3%	23.7%	2.32	27%	28%	45%
208.00	5,959	5,877	-1%	2,361	2,332	-1%	75.8%	5.4%	2.42	15%	24%	61%
214.01	2,668	2,632	-1%	869	858	-1%	56.3%	5.5%	2.62	25%	32%	43%
214.03	3,138	3,071	-2%	1,293	1,271	-2%	52.8%	6.7%	2.33	27%	27%	46%
215.00	5,595	5,567	-1%	2,483	2,474	0%	31.5%	15.0%	2.19	32%	32%	36%
Neighborhood Trade Area:	76,402	75,809	-1%	29,081	28,892	-1%	45.6%	8.9%	2.37	28%	30%	41%
202.00	4,155	4,118	-1%	1,499	1,490	-1%	64.2%	10.0%	2.64	25%	18%	56%
203.01	5,413	5,387	0%	2,209	2,204	0%	62.2%	10.7%	2.45	21%	23%	57%
203.02	2,829	2,807	-1%	1,088	1,082	-1%	60.9%	7.3%	2.56	27%	21%	51%
206.00	5,060	5,005	-1%	1,910	1,898	-1%	72.2%	7.3%	2.63	23%	19%	58%
209.00	7,949	7,919	0%	3,056	3,050	0%	64.6%	7.7%	2.52	19%	19%	61%
212.00	6,105	6,034	-1%	2,275	2,254	-1%	68.6%	7.2%	2.65	23%	17%	59%
213.00	4,106	4,061	-1%	1,668	1,649	-1%	51.4%	3.8%	2.45	24%	30%	46%
214.02	4,093	4,064	-1%	1,486	1,475	-1%	51.1%	4.2%	2.66	27%	28%	45%
216.00	6,547	6,495	-1%	2,900	2,871	-1%	45.9%	13.8%	2.22	31%	31%	38%
217.00	7,642	7,637	0%	3,227	3,231	0%	49.1%	8.8%	2.34	25%	31%	44%
Secondary Trade Area	53,899	53,527	-1%	21,318	21,204	-1%	58.3%	8.6%	2.48	24%	24%	52%

Census Tract	Est 2011 Pop	Proj 2016 Pop	Proj 5 Year Growth	Est 2011 Hholds	Proj 2016 Hholds	Proj 5 Year Growth	% Owner Occupied	% Seasonal Hholds	Hhold Size	% Single Male	% Single Female	% Married
Community												
Trade Area Total	130,301	129,336	-1%	50,399	50,096	-1%	50.9%	8.8%	2.42	27%	28%	46%
204.00	5,428	5,382	-1%	2,231	2,221	0%	57.3%	13.2%	2.43	24%	22%	54%
205.00	6,114	6,057	-1%	2,525	2,510	-1%	68.6%	11.8%	2.41	21%	20%	59%
211.00	2,701	2,686	-1%	1,164	1,160	0%	72.3%	7.5%	2.31	22%	22%	56%
218.00	4,739	4,662	-2%	2,405	2,368	-2%	36.7%	17.1%	1.94	26%	33%	40%
220.01	4,997	4,931	-1%	1,841	1,822	-1%	66.9%	6.0%	2.69	18%	25%	57%
220.03	6,279	6,229	-1%	2,663	2,647	-1%	64.7%	6.8%	2.32	21%	31%	49%
221.00	3,033	2,965	-2%	1,509	1,481	-2%	42.6%	19.0%	2.01	26%	32%	42%
Tertiary												
Trade Area	33,291	32,912	-1%	14,338	14,209	-1%	58.1%	11.6%	2.30	22%	26%	52%
Regional												
Trade Area Total	163,592	162,248	-1%	64,737	64,305	-1%	52.4%	9.5%	2.39	26%	28%	47%
Cities:												
Boulder Creek	4,053	4,017	-1%	1,676	1,669	0%	58.1%	13.3%	2.42	24%	24%	52%
Felton	1,031	1,021	-1%	397	394	-1%	37.9%	27.7%	2.49	20%	26%	55%
Scotts Valley	11,377	11,293	-1%	4,340	4,313	-1%	69.7%	5.3%	2.52	18%	21%	61%
Santa Cruz	54,790	54,395	-1%	20,812	20,683	-1%	43.0%	7.1%	2.39	29%	31%	40%
Santa Cruz County	261,161	260,533	0%	93,671	93,350	0%	52.9%	10.0%	2.68	24%	25%	51%

Appendix Table 10: POPULATION BY AGE

Census Tract	Median Age	less than 10	aged 10-19	aged 20-34	aged 35-49	aged 50-64	aged 65+
1.00	42.5	191	216	497	451	572	279
2.00	33.9	763	721	2,184	1,445	1,402	488
3.00	42.7	250	280	661	593	684	490
4.00	19.4	194	2,297	1,714	194	63	8
5.00	36.8	382	413	1,514	1,036	1,037	489
6.00	38.3	337	292	792	774	705	281
7.00	35.8	112	91	662	414	343	159
8.00	31.3	667	534	2,692	1,376	994	375
9.00	40.3	318	356	1,126	923	860	623
10.00	29.8	830	667	3,497	1,481	982	570
11.00	37.6	505	442	1,487	1,227	1,163	485
12.00	43.0	233	260	698	606	678	491
207.00	30.4	360	1,215	1,414	883	1,078	476
208.00	48.0	602	760	645	1,161	1,389	1,402
214.01	43.4	227	244	573	578	567	479
214.03	35.5	348	316	888	648	636	302
215.00	34.6	574	481	1,786	1,206	867	681
Neighborhood Trade Area:							
	34.3	6,893	9,585	22,830	14,996	14,020	8,078
202.00	43.0	359	480	842	836	1,145	493
203.01	43.1	478	549	1,158	1,122	1,546	560
203.02	39.9	290	313	656	615	724	231
206.00	42.4	530	577	999	1,070	1,390	494
209.00	39.2	983	1,113	1,483	1,761	1,795	814
212.00	43.5	617	727	1,130	1,274	1,619	738
213.00	41.6	480	464	806	789	933	634
214.02	36.2	497	532	950	933	751	430
216.00	40.5	642	591	1,456	1,616	1,529	713
217.00	36.8	828	810	1,995	1,648	1,488	873
Secondary Trade Area							
	40.5	5,704	6,156	11,475	11,664	12,920	5,980

Census Tract	Median Age	less than 10	aged 10-19	aged 20-34	aged 35-49	aged 50-64	aged 65+						
Community													
Trade Area Total	36.5	12,597	10%	15,741	12%	34,305	26%	26,660	20%	26,940	21%	14,058	11%
204.00	42.1	221	10%	385	17%	320	14%	297	13%	601	27%	407	18%
205.00	45.3	233	9%	279	11%	380	15%	286	11%	632	25%	715	28%
211.00	46.0	160	14%	181	16%	225	19%	106	9%	178	15%	314	27%
218.00	44.3	350	15%	534	22%	425	18%	296	12%	516	21%	284	12%
220.01	43.1	230	12%	238	13%	296	16%	268	15%	481	26%	328	18%
220.03	42.8	301	11%	508	19%	608	23%	384	14%	552	21%	310	12%
221.00	42.9	209	14%	298	20%	281	19%	258	17%	356	24%	107	7%
Tertiary													
Trade Area	43.7	1,704	12%	2,423	17%	2,535	18%	1,895	13%	3,316	23%	2,465	17%
Regional													
Trade Area Total	38.0	15,651	10%	19,280	12%	40,787	25%	22,681	14%	35,898	22%	18,217	11%
Cities:													
Boulder Creek	42.8	369	9%	434	11%	842	21%	882	22%	1,190	29%	337	8%
Felton	36.9	104	10%	143	14%	243	24%	211	20%	229	22%	101	10%
Scotts Valley	42.4	1,329	12%	1,587	14%	1,852	16%	2,333	21%	2,595	23%	1,682	15%
Santa Cruz	33.4	4,905	9%	6,697	12%	17,719	32%	10,776	20%	9,798	18%	4,895	9%
Santa Cruz County	36.1	30,942	12%	33,815	13%	62,131	24%	52,612	20%	53,188	20%	28,473	11%

Appendix Table 11: HOUSEHOLDS BY INCOME

Census Tract	Average Hhold Income	Median Hhold Income	Per-Cap Income	less than \$25,000	\$25,000-49,999	\$50,000-\$74,999	\$75,000-\$99,999	\$100,000-\$149,999	\$150,000+
1.00	\$99,885	\$88,293	\$38,298	70	127	137	133	234	128
2.00	\$83,214	\$72,685	\$31,410	462	416	427	395	530	309
3.00	\$127,511	\$108,128	\$50,300	94	82	144	175	344	302
4.00	\$69,197	\$44,666	\$22,929	118	117	41	26	65	50
5.00	\$115,445	\$86,863	\$48,174	197	316	393	200	504	416
6.00	\$104,591	\$83,945	\$42,152	110	177	257	223	298	217
7.00	\$58,693	\$38,873	\$31,647	311	213	133	90	94	66
8.00	\$71,177	\$59,842	\$29,775	571	553	645	482	286	232
9.00	\$88,767	\$68,718	\$42,283	269	440	348	295	351	288
10.00	\$61,850	\$43,014	\$25,724	1,059	709	520	286	279	267
11.00	\$99,793	\$74,190	\$41,192	260	464	380	287	447	350
12.00	\$113,136	\$92,318	\$44,843	87	159	188	194	310	222
207.00	\$102,253	\$83,720	\$37,939	148	179	351	397	288	343
208.00	\$120,245	\$96,386	\$48,524	241	349	326	299	563	583
214.01	\$82,848	\$71,109	\$30,112	77	225	152	105	237	73
214.03	\$64,072	\$56,013	\$27,262	231	308	368	147	190	49
215.00	\$80,560	\$56,776	\$36,326	471	646	392	356	354	264
Neighborhood Trade Area:	\$90,067	\$69,747	\$36,369	4,776	5,480	5,202	4,090	5,374	4,159
				16.4%	18.8%	17.9%	14.1%	18.5%	14.3%
202.00	\$136,740	\$105,466	\$50,371	127	162	210	196	424	380
203.01	\$110,223	\$88,149	\$44,981	132	294	470	348	586	379
203.02	\$87,335	\$75,395	\$33,934	98	242	200	181	275	92
206.00	\$103,552	\$88,330	\$39,222	138	218	405	319	484	346
209.00	\$121,344	\$97,811	\$47,336	217	376	540	424	728	771
212.00	\$120,290	\$101,460	\$45,066	185	269	374	292	531	624
213.00	\$85,420	\$66,528	\$34,778	285	351	284	234	352	162
214.02	\$72,093	\$56,756	\$26,892	222	453	260	202	221	128
216.00	\$77,984	\$55,007	\$34,858	646	697	479	365	437	276
217.00	\$69,407	\$58,719	\$29,596	533	834	696	532	464	168
Secondary Trade Area	\$97,827	\$76,590	\$39,071	2,583	3,896	3,918	3,093	4,502	3,326
				12.1%	18.3%	18.4%	14.5%	21.1%	15.6%

Census Tract	Average Hhold Income	Median Hhold Income	Per-Cap Income	less than \$25,000	\$25,000-49,999	\$50,000-\$74,999	\$75,000-\$99,999	\$100,000-\$149,999	\$150,000+						
Community															
Trade Area Total	\$93,349	\$72,808	\$37,487	7,359	14.6%	9,376	18.6%	9,120	18.1%	7,183	14.3%	9,876	19.6%	7,485	14.9%
204.00	\$115,842	\$89,325	\$47,648	221	9.9%	385	17.3%	320	14.3%	297	13.3%	601	26.9%	407	18.2%
205.00	\$135,163	\$105,705	\$55,880	233	9.2%	279	11.0%	380	15.0%	286	11.3%	632	25.0%	715	28.3%
211.00	\$135,493	\$78,060	\$58,470	160	13.7%	181	15.5%	225	19.3%	106	9.1%	178	15.3%	314	27.0%
218.00	\$83,959	\$67,222	\$42,932	350	14.6%	534	22.2%	425	17.7%	296	12.3%	516	21.5%	284	11.8%
220.01	\$120,701	\$87,826	\$44,694	230	12.5%	238	12.9%	296	16.1%	268	14.6%	481	26.1%	328	17.8%
220.03	\$87,864	\$70,749	\$37,637	301	11.3%	508	19.1%	608	22.8%	384	14.4%	552	20.7%	310	11.6%
221.00	\$80,732	\$71,494	\$40,167	209	13.9%	298	19.7%	281	18.6%	258	17.1%	356	23.6%	107	7.1%
Tertiary															
Trade Area	\$107,224	\$82,068	\$46,353	1,704	11.9%	2,423	16.9%	2,535	17.7%	1,895	13.2%	3,316	23.1%	2,465	17.2%
Regional															
Trade Area Total	\$96,422	\$74,606	\$39,291	9,063	14.0%	11,799	18.2%	11,655	18.0%	9,078	14.0%	13,192	20.4%	9,950	15.4%
Cities:															
Boulder Creek	\$112,743	\$82,788	\$46,544	180	10.7%	322	19.2%	250	14.9%	230	13.7%	391	23.3%	304	18.1%
Felton	\$72,010	\$61,080	\$28,637	87	21.9%	68	17.1%	105	26.4%	61	15.4%	60	15.1%	16	4.0%
Scotts Valley	\$116,789	\$94,841	\$45,555	381	8.8%	617	14.2%	725	16.7%	538	12.4%	1,049	24.2%	1,032	23.8%
Santa Cruz	\$89,172	\$69,247	\$35,884	3,642	17.5%	3,818	18.3%	3,674	17.7%	2,864	13.8%	3,867	18.6%	2,945	14.2%
Santa Cruz County	\$94,672	\$72,278	\$34,767	13,499	14.4%	17,785	19.0%	17,065	18.2%	13,048	13.9%	18,122	19.3%	14,152	15.1%

APPENDIX TABLE 12: POPULATION BY RACE AND EMPLOYMENT

Census Tract	% White	% African American	% Asian	% Hispanic Ethnicity	% College Degree	% White Collar Employee	Employment By Business Type					
							Bus/Mgt	Comp	Edu	Health care	Sales	Bus Adm
1.00	84%	1%	5%	15%	48%	74%	17%	3%	11%	9%	10%	11%
2.00	70%	2%	8%	39%	41%	67%	15%	6%	7%	5%	12%	12%
3.00	85%	1%	7%	10%	64%	85%	18%	4%	18%	5%	14%	11%
4.00	55%	3%	39%	36%	84%	75%	5%	7%	28%	1%	10%	15%
5.00	77%	2%	11%	16%	62%	79%	14%	8%	13%	5%	13%	12%
6.00	81%	1%	6%	16%	63%	78%	16%	8%	16%	3%	10%	7%
7.00	75%	2%	10%	26%	54%	74%	9%	6%	17%	3%	8%	19%
8.00	71%	2%	6%	42%	46%	64%	11%	4%	12%	3%	12%	10%
9.00	79%	1%	6%	21%	50%	69%	17%	3%	9%	6%	13%	9%
10.00	62%	3%	8%	67%	37%	55%	9%	4%	8%	2%	10%	8%
11.00	79%	2%	5%	21%	55%	78%	19%	4%	11%	5%	11%	14%
12.00	79%	1%	6%	21%	51%	73%	13%	6%	11%	7%	9%	13%
207.00	78%	1%	11%	13%	48%	71%	15%	7%	13%	5%	8%	12%
208.00	89%	0%	5%	8%	46%	80%	29%	4%	9%	5%	13%	9%
214.01	76%	1%	5%	33%	35%	64%	13%	5%	6%	5%	11%	13%
214.03	72%	2%	6%	39%	37%	58%	7%	3%	9%	7%	11%	12%
215.00	73%	1%	4%	40%	38%	61%	13%	3%	6%	3%	13%	13%
Neighborhood Trade Area:												
	74%	2%	8%	29%	48%	69%	14%	5%	11%	4%	11%	11%
202.00	82%	1%	3%	18%	58%	70%	20%	6%	11%	4%	11%	7%
203.01	88%	1%	2%	8%	43%	75%	19%	6%	7%	4%	15%	10%
203.02	87%	0%	3%	11%	38%	72%	17%	5%	8%	6%	12%	13%
206.00	89%	1%	1%	8%	41%	72%	17%	6%	9%	6%	11%	11%
209.00	82%	1%	8%	12%	51%	79%	24%	8%	8%	4%	12%	11%
212.00	87%	1%	5%	8%	53%	78%	21%	4%	9%	8%	14%	8%
213.00	74%	1%	6%	36%	42%	70%	16%	3%	6%	7%	12%	15%
214.02	69%	2%	8%	45%	28%	55%	8%	3%	5%	6%	13%	11%
216.00	80%	1%	4%	20%	38%	67%	14%	5%	5%	5%	13%	13%
217.00	72%	2%	10%	33%	34%	62%	15%	3%	7%	4%	12%	12%
Secondary Trade Area												
	81%	1%	5%	19%	43%	70%	17%	5%	7%	5%	12%	11%

APPENDIX TABLE 12: POPULATION BY RACE AND EMPLOYMENT
SANTA CRUZ, CA

Census Tract	% White	% African American	% Asian	% Hispanic Ethnicity	% College Degree	% White Collar Employed	Employment By Business Type					
							Bus/Mgt	Comp	Edu	Health care	Sales	Bus Adm
Community												
Trade Area Total	77%	1%	7%	24%	46%	70%	16%	5%	10%	5%	12%	11%
	204.00	88%	1%	2%	7%	66%	16%	7%	7%	6%	11%	12%
	205.00	90%	1%	2%	6%	73%	22%	7%	7%	3%	8%	8%
	211.00	87%	1%	3%	11%	77%	23%	6%	8%	11%	10%	7%
	218.00	85%	1%	4%	10%	71%	20%	4%	7%	5%	11%	11%
	220.01	85%	1%	3%	13%	79%	22%	1%	7%	10%	12%	9%
	220.03	83%	1%	5%	13%	73%	19%	3%	7%	9%	13%	13%
	221.00	88%	1%	2%	9%	75%	17%	4%	8%	8%	16%	12%
Tertiary												
Trade Area	86%	1%	3%	10%	47%	73%	20%	5%	7%	11%	10%	0%
Regional												
Trade Area Total	80%	1%	4%	16%	46%	70%	16%	5%	9%	5%	12%	11%
Cities:												
Boulder Creek	87%	1%	3%	9%	38%	67%	15%	6%	7%	5%	12%	12%
Felton	87%	1%	2%	11%	58%	61%	10%	3%	17%	6%	5%	10%
Scotts Valley	84%	1%	7%	10%	49%	79%	24%	6%	9%	5%	12%	10%
Santa Cruz	73%	2%	9%	30%	51%	70%	14%	5%	12%	4%	11%	11%
Santa Cruz County	70%	1%	6%	47%	40%	66%	15%	4%	8%	5%	11%	11%

Census Tract	Connoisseurs		Laptops & Lattes		Urban Chic		In-Style		Metropolitans		Trendsetters		Retirement Communities		Old & Newcomers	
	Count	Percent	Count	Percent	Count	Percent	Count	Percent	Count	Percent	Count	Percent	Count	Percent	Count	Percent
1.00	0	0%	0	0%	829	100%	0	0%	0	0%	0	0%	0	0%	0	0%
2.00	0	0%	0	0%	1,397	55%	0	0%	0	0%	721	28%	0	0%	0	0%
3.00	0	0%	0	0%	1,141	100%	0	0%	0	0%	0	0%	0	0%	0	0%
4.00	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%
5.00	0	0%	0	0%	2,026	100%	0	0%	0	0%	0	0%	0	0%	0	0%
6.00	0	0%	0	0%	1,282	100%	0	0%	0	0%	0	0%	0	0%	0	0%
7.00	0	0%	0	0%	0	0%	0	0%	0	0%	422	47%	0	0%	0	0%
8.00	0	0%	0	0%	276	10%	0	0%	0	0%	2,366	85%	0	0%	0	0%
9.00	0	0%	498	25%	438	22%	0	0%	0	0%	1,055	53%	0	0%	0	0%
10.00	0	0%	0	0%	229	7%	0	0%	0	0%	1,054	34%	0	0%	0	0%
11.00	0	0%	0	0%	1,480	68%	0	0%	0	0%	708	32%	0	0%	0	0%
12.00	0	0%	0	0%	1,160	100%	0	0%	0	0%	0	0%	0	0%	0	0%
207.00	0	0%	0	0%	1,706	100%	0	0%	0	0%	0	0%	0	0%	0	0%
208.00	1,339	57%	0	0%	0	0%	0	0%	0	0%	0	0%	1,022	43%	0	0%
214.01	0	0%	0	0%	524	60%	0	0%	0	0%	0	0%	0	0%	0	0%
214.03	0	0%	0	0%	368	15%	311	24%	0	0%	0	0%	0	0%	982	76%
215.00	0	0%	492	20%	0	0%	0	0%	0	0%	0	0%	0	0%	1,623	65%
Neighborhood Trade Area:	1,339	5%	990	3%	12,856	44%	311	1%	0	0%	6,326	22%	1,022	4%	2,605	9%
202.00	0	0%	0	0%	1,499	100%	0	0%	0	0%	0	0%	0	0%	0	0%
203.01	0	0%	0	0%	2,209	100%	0	0%	0	0%	0	0%	0	0%	0	0%
203.02	0	0%	0	0%	797	73%	0	0%	0	0%	0	0%	0	0%	0	0%
206.00	0	0%	0	0%	1,323	69%	0	0%	0	0%	0	0%	0	0%	0	0%
209.00	0	0%	0	0%	2,319	76%	0	0%	0	0%	0	0%	0	0%	0	0%
212.00	0	0%	0	0%	1,861	82%	0	0%	0	0%	0	0%	0	0%	0	0%
213.00	220	13%	0	0%	0	0%	354	21%	0	0%	0	0%	784	47%	0	0%
214.02	0	0%	0	0%	0	0%	0	0%	0	0%	721	49%	0	0%	0	0%
216.00	0	0%	0	0%	1,126	39%	0	0%	949	33%	0	0%	0	0%	0	0%
217.00	0	0%	0	0%	528	16%	0	0%	0	0%	0	0%	0	0%	1,988	62%
Secondary Trade Area	220	1%	0	0%	11,662	55%	354	2%	949	4%	721	3%	784	4%	1,988	9%
Community Trade Area Total	1,559	3%	990	2%	24,518	49%	665	1%	949	2%	7,047	14%	1,806	4%	4,593	9%

Census Tract	Connoisseurs		Laptops & Lattes		Urban Chic		In-Style		Metropolitans		Trendsetters		Retirement Communities		Old & Newcomers	
	Count	Percent	Count	Percent	Count	Percent	Count	Percent	Count	Percent	Count	Percent	Count	Percent	Count	Percent
Community Trade Area Total	1,559	3%	990	2%	24,518	49%	665	1%	949	2%	7,047	14%	1,806	4%	4,593	9%
204.00	0	0%	0	0%	2,231	100%	0	0%	0	0%	0	0%	0	0%	0	0%
205.00	0	0%	0	0%	1,883	75%	0	0%	0	0%	0	0%	0	0%	0	0%
211.00	0	0%	0	0%	1,164	100%	0	0%	0	0%	0	0%	0	0%	0	0%
218.00	0	0%	1,057	44%	591	25%	0	0%	0	0%	757	31%	0	0%	0	0%
220.01	0	0%	0	0%	1,841	100%	0	0%	0	0%	0	0%	0	0%	0	0%
220.03	0	0%	0	0%	686	26%	1,326	50%	0	0%	0	0%	0	0%	0	0%
221.00	0	0%	0	0%	571		0		938		0		0		0	
Tertiary Trade Area	0	0%	1,057	7%	8,967	63%	1,326	9%	938	7%	757	5%	0	0%	0	0%
Regional Trade Area Total	1,559	2%	2,047	3%	33,485	52%	1,991	3%	1,887	3%	7,804	12%	1,806	3%	4,593	7%
Cities:																
Boulder Creek	0	0%	0	0%	1,676	100%	0	0%	0	0%	0	0%	0	0%	0	0%
Felton	0	0%	0	0%	397	100%	0	0%	0	0%	0	0%	0	0%	0	0%
Scotts Valley	292	7%	0	0%	2,038	47%	0	0%	0	0%	0	0%	918	21%	0	0%
Santa Cruz	99	0%	498	2%	10,602	51%	0	0%	0	0%	6,326	30%	0	0%	0	0%
Santa Cruz County	4,411	5%	2,047	2%	40,735	43%	1,991	2%	1,887	2%	7,804	8%	1,806	2%	4,593	5%

Description	West Zone - Cabrillo Highway						East Zone - Soguel Avenue					
	0.00 - 1.00 miles		0.00 - 2.00 miles		0.00 - 3.00 miles		0.00 - 1.00 miles		0.00 - 2.00 miles		0.00 - 3.00 miles	
	Radius 1	%	Radius 2	%	Radius 3	%	Radius 1	%	Radius 2	%	Radius 3	%
Population												
2015 Projection	13,980		54,718		74,682		22,034		57,037		92,516	
2010 Estimate	13,499		53,480		73,395		21,658		56,055		91,438	
2000 Census	12,712		51,730		72,003		21,403		55,150		91,049	
1990 Census	10,746		46,343		65,339		19,231		49,202		83,286	
Growth 2010-2015	3.56%		2.31%		1.75%		1.74%		1.75%		1.18%	
Growth 2000-2010	6.19%		3.38%		1.93%		1.19%		1.64%		0.43%	
Growth 1990-2000	18.30%		11.62%		10.20%		11.29%		12.09%		9.32%	
2010 Est. Pop by Single Race Class												
White Alone	13,499		53,480		73,395		21,658		56,055		91,438	
Black or African American Alone	10,216	75.68	41,014	76.69	56,673	77.22	16,458	75.99	42,909	76.55	70,441	77.04
Amer. Indian and Alaska Native Alone	231	1.71	911	1.70	1,147	1.56	403	1.86	896	1.60	1,399	1.53
Asian Alone	138	1.02	430	0.80	589	0.80	238	1.10	511	0.91	724	0.79
Native Hawaiian and Other Pac. Isl. Alone	673	4.99	3,098	5.79	3,893	5.30	849	3.92	2,302	4.11	4,654	5.09
Some Other Race Alone	31	0.23	93	0.17	127	0.17	37	0.17	95	0.17	178	0.19
Two or More Races	1,516	11.23	5,038	9.42	6,997	9.53	2,444	11.28	6,273	11.19	8,979	9.82
	695	5.15	2,896	5.42	3,970	5.41	1,229	5.67	3,069	5.47	5,063	5.54
2010 Est. Pop Hisp or Latino by Origin												
Not Hispanic or Latino	13,499		53,480		73,395		21,658		56,055		91,438	
Hispanic or Latino:	10,711	79.35	43,978	82.23	60,070	81.84	16,763	77.40	43,955	78.41	74,327	81.29
Mexican	2,788	20.65	9,502	17.77	13,326	18.16	4,895	22.60	12,100	21.59	17,111	18.71
Puerto Rican	2,385	85.55	8,126	85.52	11,507	86.35	4,204	85.88	10,588	87.50	14,789	86.43
Cuban	26	0.93	97	1.02	136	1.02	44	0.90	115	0.95	179	1.05
All Other Hispanic or Latino	10	0.36	31	0.33	36	0.27	5	0.10	21	0.17	44	0.26
	368	13.20	1,248	13.13	1,646	12.35	643	13.14	1,376	11.37	2,098	12.26
2010 Est. Hisp or Latino by Single Race Class												
White Alone	2,788		9,502		13,326		4,895		12,100		17,111	
Black or African American Alone	1,023	36.69	3,582	37.70	5,073	38.07	2,016	41.18	4,711	38.93	6,475	37.84
American Indian and Alaska Native Alone	19	0.68	59	0.62	86	0.65	21	0.43	81	0.67	103	0.60
Asian Alone	73	2.62	226	2.38	265	1.99	147	3.00	262	2.17	319	1.86
Native Hawaiian, Other Pacific Islander Alone	30	1.08	80	0.84	110	0.83	28	0.57	83	0.69	131	0.77
Some Other Race Alone	7	0.25	18	0.19	20	0.15	4	0.08	11	0.09	21	0.12
Two or More Races	1,450	52.01	4,802	50.54	6,701	50.29	2,331	47.62	6,047	49.98	8,608	50.31
	187	6.71	735	7.74	1,071	8.04	349	7.13	904	7.47	1,454	8.50

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Appendix Table 14B: Pop-Facts: Demographic Overview Report
West Zone and East Zone

Description	West Zone - Cabrillo Highway						East Zone - Soguel Avenue					
	0.00 - 1.00 miles Radius 1	%	0.00 - 2.00 miles Radius 2	%	0.00 - 3.00 miles Radius 3	%	0.00 - 1.00 miles Radius 1	%	0.00 - 2.00 miles Radius 2	%	0.00 - 3.00 miles Radius 3	%
2010 Est. Pop. Asian Alone Race by Cat	673		3,098		3,893		849		2,302		4,654	
Chinese, except Taiwanese	207	30.76	979	31.60	1,156	29.69	288	33.92	591	25.67	1,324	28.45
Filipino	110	16.34	552	17.82	757	19.45	145	17.08	475	20.63	969	20.82
Japanese	131	19.47	479	15.46	610	15.67	125	14.72	396	17.20	719	15.45
Asian Indian	83	12.33	405	13.07	473	12.15	116	13.66	307	13.34	514	11.04
Korean	59	8.77	246	7.94	341	8.76	66	7.77	212	9.21	410	8.81
Vietnamese	31	4.61	147	4.74	185	4.75	32	3.77	98	4.26	260	5.59
Cambodian	0	0.00	7	0.23	32	0.82	3	0.35	33	1.43	72	1.55
Hmong	0	0.00	1	0.03	2	0.05	0	0.00	0	0.00	2	0.04
Laotian	0	0.00	16	0.52	19	0.49	2	0.24	8	0.35	19	0.41
Thai	23	3.42	68	2.19	78	2.00	33	3.89	65	2.82	95	2.04
All Other Asian Races Including 2+ Category	28	4.16	199	6.42	241	6.19	38	4.48	118	5.13	272	5.84
2010 Est. Population by Ancestry	13,499		53,480		73,395		21,658		56,055		91,438	
Pop. Arab	49	0.36	204	0.38	245	0.33	81	0.37	160	0.29	287	0.31
Pop. Czech	32	0.24	179	0.33	297	0.40	30	0.14	173	0.31	344	0.38
Pop. Danish	188	1.39	557	1.04	673	0.92	328	1.51	571	1.02	789	0.86
Pop. Dutch	137	1.01	460	0.86	612	0.83	140	0.65	436	0.78	740	0.81
Pop. English	990	7.33	3,729	6.97	5,477	7.46	1,479	6.83	4,171	7.44	7,070	7.73
Pop. French (except Basque)	366	2.71	1,231	2.30	1,668	2.27	531	2.45	1,365	2.44	2,361	2.58
Pop. French Canadian	68	0.50	303	0.57	431	0.59	158	0.73	320	0.57	515	0.56
Pop. German	1,186	8.79	5,098	9.53	7,330	9.99	1,967	9.08	5,424	9.68	9,333	10.21
Pop. Greek	70	0.52	232	0.43	291	0.40	81	0.37	228	0.41	361	0.39
Pop. Hungarian	24	0.18	109	0.20	166	0.23	22	0.10	106	0.19	238	0.26
Pop. Irish	1,157	8.57	4,593	8.59	6,345	8.65	1,862	8.60	4,640	8.28	8,059	8.81
Pop. Italian	830	6.15	3,462	6.47	4,623	6.30	1,321	6.10	3,340	5.96	5,578	6.10
Pop. Lithuanian	12	0.09	49	0.09	73	0.10	24	0.11	68	0.12	96	0.10
Pop. United States or American	383	2.84	1,354	2.53	1,884	2.57	576	2.66	1,476	2.63	2,475	2.71
Pop. Norwegian	177	1.31	616	1.15	815	1.11	276	1.27	643	1.15	1,081	1.18
Pop. Polish	215	1.59	925	1.73	1,215	1.66	405	1.87	889	1.59	1,476	1.61
Pop. Portuguese	195	1.44	814	1.52	1,138	1.55	456	2.11	928	1.66	1,479	1.62
Pop. Russian	297	2.20	1,144	2.14	1,441	1.96	400	1.85	927	1.65	1,616	1.77
Pop. Scottish	356	2.64	1,209	2.26	1,699	2.31	451	2.08	1,309	2.34	2,124	2.32
Pop. Scotch-Irish	205	1.52	666	1.25	893	1.22	258	1.19	679	1.21	1,103	1.21
Pop. Slovak	10	0.07	20	0.04	47	0.06	18	0.08	42	0.07	63	0.07
Pop. Sub-Saharan African	88	0.65	252	0.47	340	0.46	107	0.49	261	0.47	350	0.38
Pop. Swedish	222	1.64	922	1.72	1,166	1.59	370	1.71	818	1.46	1,350	1.48
Pop. Swiss	86	0.64	271	0.51	384	0.52	105	0.48	331	0.59	475	0.52
Pop. Ukrainian	21	0.16	129	0.24	198	0.27	49	0.23	126	0.22	219	0.24
Pop. Welsh	51	0.38	235	0.44	323	0.44	68	0.31	218	0.39	449	0.49
Pop. West Indian (exc Hisp groups)	0	0.00	6	0.01	9	0.01	3	0.01	6	0.01	12	0.01
Pop. Other ancestries	5,392	39.94	21,606	40.40	29,174	39.75	8,677	40.06	23,029	41.08	35,848	39.20

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Appendix Table 14C: Pop-Facts: Demographic Overview Report
West Zone and East Zone

Description	West Zone - Cabrillo Highway						East Zone - Soguel Avenue					
	0.00 - 1.00 miles		0.00 - 2.00 miles		0.00 - 3.00 miles		0.00 - 1.00 miles		0.00 - 2.00 miles		0.00 - 3.00 miles	
	Radius 1	%	Radius 2	%	Radius 3	%	Radius 1	%	Radius 2	%	Radius 3	%
2010 Est. Population by Ancestry												
Pop. Ancestry Unclassified	691	5.12	3,104	5.80	4,435	6.04	1,418	6.55	3,374	6.02	5,547	6.07
2010 Est. Pop Age 5+ by Language Spoken At Home	12,820		50,830		69,677		20,461		52,994		86,614	
Speak Only English at Home	9,775	76.25	39,462	77.64	54,545	78.28	15,980	78.10	41,025	77.41	67,950	78.45
Speak Asian/Pac. Isl. Lang. at Home	242	1.89	1,783	2.75	1,783	2.56	314	1.53	920	1.74	2,114	2.44
Speak Indo-European Language at Home	572	4.46	2,316	4.56	3,012	4.32	759	3.71	2,025	3.82	3,546	4.09
Speak Spanish at Home	2,209	17.23	7,335	14.43	9,955	14.29	3,360	16.42	8,859	16.72	12,602	14.55
Speak Other Language at Home	22	0.17	317	0.62	381	0.55	48	0.23	164	0.31	403	0.47
2010 Est. Population by Sex	13,499		53,480		73,395		21,658		56,055		91,438	
Male	6,943	51.43	26,764	50.04	36,624	49.90	10,967	50.64	28,202	50.31	45,636	49.91
Female	6,556	48.57	26,716	49.96	36,772	50.10	10,691	49.36	27,853	49.69	45,802	50.09
2010 Est. Population by Age	13,499		53,480		73,395		21,658		56,055		91,438	
Age 0 - 4	680	5.04	2,651	4.96	3,719	5.07	1,197	5.53	3,062	5.46	4,824	5.28
Age 5 - 9	647	4.79	2,489	4.65	3,486	4.75	1,130	5.22	2,884	5.14	4,527	4.95
Age 10 - 14	601	4.45	2,323	4.34	3,255	4.43	1,046	4.83	2,663	4.75	4,237	4.63
Age 15 - 17	311	2.30	1,304	2.44	1,932	2.63	603	2.78	1,523	2.72	2,538	2.78
Age 18 - 20	549	4.07	4,738	8.86	5,774	7.87	848	3.92	2,252	4.02	6,044	6.61
Age 21 - 24	995	7.37	4,349	8.13	5,554	7.57	1,569	7.24	3,998	7.13	6,357	6.95
Age 25 - 34	2,376	17.60	8,344	15.60	11,161	15.21	3,670	16.95	9,075	16.19	13,725	15.01
Age 35 - 44	2,125	15.74	7,578	14.17	10,244	13.96	3,376	15.59	8,430	15.04	13,092	14.32
Age 45 - 54	1,952	14.46	7,401	13.84	10,373	14.13	3,195	14.75	8,141	14.52	13,335	14.58
Age 55 - 64	1,928	14.28	7,224	13.51	10,063	13.71	3,087	14.25	7,875	14.05	12,724	13.92
Age 65 - 74	780	5.78	2,853	5.33	4,195	5.72	1,088	5.02	3,223	5.75	5,314	5.81
Age 75 - 84	383	2.84	1,418	2.65	2,234	3.04	506	2.34	1,703	3.04	2,837	3.10
Age 85 and over	173	1.28	809	1.51	1,406	1.92	344	1.59	1,227	2.19	1,883	2.06
Age 16 and over	11,469	84.96	45,556	85.18	62,265	84.84	18,065	83.41	46,918	83.70	76,971	84.18
Age 18 and over	11,261	83.42	44,713	83.61	61,004	83.12	17,682	81.64	45,924	81.93	75,311	82.36
Age 21 and over	10,712	79.35	39,975	74.75	55,230	75.25	16,834	77.73	43,672	77.91	69,267	75.75
Age 65 and over	1,336	9.90	5,080	9.50	7,835	10.68	1,938	8.95	6,153	10.98	10,034	10.97
2010 Est. Median Age	37.78		35.72		36.77		37.27		38.05		37.65	
2010 Est. Average Age	38.60		37.50		38.20		38.00		38.90		38.60	

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Description	West Zone - Cabrillo Highway						East Zone - Soguel Avenue					
	0.00 - 1.00 miles Radius 1	%	0.00 - 2.00 miles Radius 2	%	0.00 - 3.00 miles Radius 3	%	0.00 - 1.00 miles Radius 1	%	0.00 - 2.00 miles Radius 2	%	0.00 - 3.00 miles Radius 3	%
2010 Est. Male Population by Age												
Age 0 - 4	6,943	5.16	26,764	5.16	36,624	5.31	10,967	5.72	28,202	5.69	45,636	5.53
Age 5 - 9	358	4.84	1,381	4.80	1,943	4.91	627	5.33	1,604	5.27	2,523	5.12
Age 10 - 14	336	4.55	1,284	4.41	1,797	4.53	584	4.94	1,487	4.85	2,335	4.78
Age 15 - 17	169	2.43	685	2.56	1,015	2.77	318	2.90	803	2.85	1,308	2.87
Age 18 - 20	269	3.87	2,148	8.03	2,625	7.17	442	4.03	1,095	3.88	2,815	6.17
Age 21 - 24	488	7.03	2,079	7.77	2,695	7.36	781	7.12	1,936	6.86	3,140	6.88
Age 25 - 34	1,272	18.32	4,425	16.53	5,881	16.06	1,952	17.80	4,808	17.05	7,197	15.77
Age 35 - 44	1,137	16.38	3,956	14.78	5,373	14.67	1,759	16.04	4,426	15.69	6,836	14.98
Age 45 - 54	1,002	14.43	3,757	14.04	5,243	14.32	1,604	14.63	4,138	14.67	6,722	14.73
Age 55 - 64	997	14.36	3,693	13.80	5,110	13.95	1,575	14.36	4,027	14.28	6,453	14.14
Age 65 - 74	371	5.34	1,349	5.04	1,984	5.42	504	4.60	1,513	5.36	2,495	5.47
Age 75 - 84	167	2.41	583	2.18	895	2.44	194	1.77	665	2.36	1,104	2.42
Age 85 and over	60	0.86	243	0.91	406	1.11	85	0.78	332	1.18	528	1.16
2010 Est. Median Age, Male	37.32		35.50		36.30		36.35		37.26		36.93	
2010 Est. Average Age, Male	38.00		36.90		37.40		36.90		37.80		37.60	
2010 Est. Female Population by Age												
Age 0 - 4	6,556	4.90	26,716	4.75	36,772	4.83	10,691	5.33	27,853	5.23	45,802	5.02
Age 5 - 9	321	4.74	1,269	4.51	1,776	4.59	570	5.11	1,458	5.02	2,301	4.79
Age 10 - 14	311	4.35	1,206	4.27	1,689	4.34	546	4.71	1,397	4.65	2,192	4.49
Age 15 - 17	285	2.18	619	2.32	916	2.49	285	2.67	719	2.58	1,231	2.69
Age 18 - 20	143	4.27	2,590	9.69	3,149	8.56	407	3.81	1,157	4.15	3,229	7.05
Age 21 - 24	280	7.73	2,270	8.50	2,859	7.77	788	7.37	2,062	7.40	3,217	7.02
Age 25 - 34	507	16.84	3,919	14.67	5,279	14.36	1,718	16.07	4,266	15.32	6,528	14.25
Age 35 - 44	1,104	15.07	3,622	13.56	4,870	13.24	1,617	15.12	4,004	14.38	6,256	13.66
Age 45 - 54	988	14.49	3,644	13.64	5,131	13.95	1,590	14.87	4,003	14.37	6,614	14.44
Age 55 - 64	950	14.19	3,531	13.22	4,954	13.47	1,511	14.13	3,849	13.82	6,271	13.69
Age 65 - 74	930	6.24	1,504	5.63	2,211	6.01	584	5.46	1,710	6.14	2,819	6.15
Age 75 - 84	409	3.29	835	3.13	1,340	3.64	312	2.92	1,038	3.73	1,733	3.78
Age 85 and over	216	1.72	567	2.12	1,000	2.72	259	2.42	895	3.21	1,355	2.96
2010 Est. Median Age, Female	38.32		35.95		37.30		38.26		38.93		38.43	
2010 Est. Average Age, Female	39.30		38.00		39.00		39.00		39.90		39.50	

Description	West Zone - Cabrillo Highway						East Zone - Soguel Avenue					
	0.00 - 1.00 miles		0.00 - 2.00 miles		0.00 - 3.00 miles		0.00 - 1.00 miles		0.00 - 2.00 miles		0.00 - 3.00 miles	
	Radius 1	%	Radius 2	%	Radius 3	%	Radius 1	%	Radius 2	%	Radius 3	%
2010 Est. Pop Age 15+ by Marital Status	11,573		46,017		62,935		18,285		47,447		77,850	
Total, Never Married	5,349	46.22	21,740	47.24	28,094	44.64	8,218	44.94	20,537	43.28	33,339	42.82
Males, Never Married	2,962	25.59	11,347	24.66	14,812	23.54	4,464	24.41	11,171	23.54	17,818	22.89
Females, Never Married	2,387	20.63	10,393	22.59	13,282	21.10	3,754	20.53	9,366	19.74	15,521	19.94
Married, Spouse present	3,881	33.53	15,459	33.59	22,183	35.25	6,027	32.96	16,495	34.77	27,983	35.94
Married, Spouse absent	602	5.20	2,051	4.46	2,774	4.41	844	4.62	2,186	4.61	3,294	4.23
Widowed	315	2.72	1,614	3.51	2,634	4.19	654	3.58	2,238	4.72	3,571	4.59
Males Widowed	48	0.41	332	0.72	522	0.83	119	0.65	430	0.91	682	0.88
Females Widowed	267	2.31	1,282	2.79	2,112	3.36	534	2.92	1,807	3.81	2,889	3.71
Divorced	1,425	12.31	5,154	11.20	7,249	11.52	2,542	13.90	5,991	12.63	9,663	12.41
Males Divorced	622	5.37	2,191	4.76	3,054	4.85	1,098	6.00	2,598	5.48	4,053	5.21
Females Divorced	803	6.94	2,963	6.44	4,196	6.67	1,445	7.90	3,393	7.15	5,610	7.21
2010 Est. Pop. Age 25+ by Edu. Attainment	9,717		35,625		49,676		15,265		39,674		62,910	
Less than 9th grade	332	3.42	1,512	4.24	2,052	4.13	782	5.12	1,908	4.81	2,624	4.17
Some High School, no diploma	564	5.80	1,473	4.13	2,122	4.27	795	5.21	1,952	4.92	2,770	4.40
High School Graduate (or GED)	1,431	14.73	4,704	13.20	6,949	13.99	2,136	13.99	5,959	15.02	9,398	14.94
Some College, no degree	1,814	18.67	7,135	20.03	10,427	20.99	3,307	21.66	8,705	21.94	14,188	22.55
Associate Degree	676	6.96	2,770	7.78	4,088	8.23	1,392	9.12	3,538	8.92	5,255	8.35
Bachelor's Degree	2,761	28.41	10,347	29.04	13,870	27.92	4,385	28.73	10,697	26.96	17,097	27.18
Master's Degree	1,341	13.80	4,770	13.39	6,401	12.89	1,728	11.32	4,649	11.72	7,317	11.63
Professional School Degree	400	4.12	1,204	3.38	1,669	3.36	443	2.90	1,113	2.81	2,027	3.22
Doctorate Degree	399	4.11	1,711	4.80	2,098	4.22	298	1.95	1,153	2.91	2,233	3.55
2010 Est Pop Age 25+ by Edu. Attain, Hisp. or Lat	1,569		4,968		7,050		2,664		6,549		9,128	
Less than 9th grade	290	18.48	1,161	23.37	1,536	21.79	638	23.95	1,494	22.81	1,895	20.76
Some High School, no diploma	222	14.15	533	10.73	777	11.02	320	12.01	782	11.94	1,050	11.50
High School Graduate (or GED)	292	18.61	829	16.69	1,327	18.82	542	20.35	1,293	19.74	1,786	19.57
Some College, no degree	213	13.58	879	17.69	1,293	18.34	381	14.30	1,197	18.28	1,693	18.55
Associate Degree	120	7.65	283	5.70	425	6.03	125	4.69	373	5.70	523	5.73
Bachelor's Degree	334	21.29	982	19.77	1,292	18.33	551	20.68	1,111	16.96	1,576	17.27
Graduate or Professional Degree	99	6.31	301	6.06	400	5.67	107	4.02	299	4.57	606	6.64

Description	West Zone - Cabrillo Highway						East Zone - Soguel Avenue					
	0.00 - 1.00 miles		0.00 - 2.00 miles		0.00 - 3.00 miles		0.00 - 1.00 miles		0.00 - 2.00 miles		0.00 - 3.00 miles	
	Radius 1	%	Radius 2	%	Radius 3	%	Radius 1	%	Radius 2	%	Radius 3	%
Households												
2015 Projection	5,724		21,048		28,828		8,853		23,022		36,403	
2010 Estimate	5,484		20,434		28,170		8,700		22,507		35,840	
2000 Census	5,081		19,533		27,347		8,558		21,890		35,421	
1990 Census	4,348		17,206		24,401		7,815		19,673		32,351	
Growth 2010-2015	4.38%		3.00%		2.34%		1.76%		2.29%		1.57%	
Growth 2000-2010	7.93%		4.61%		3.01%		1.66%		2.82%		1.18%	
Growth 1990-2000	16.86%		13.52%		12.07%		9.51%		11.27%		9.49%	
2010 Est. Households by Household Type												
Family Households	5,484	46.41	20,434	50.04	28,170	51.69	8,700	49.71	22,507	50.22	35,840	52.22
Nonfamily Households	2,545	53.59	10,225	49.96	14,561	48.31	4,375	50.29	11,303	49.78	18,716	47.78
	2,939		10,209		13,609				11,204		17,123	
2010 Est. Group Quarters Population	755		4,850		6,057		689		2,377		5,877	
2010 HHs by Ethnicity, Hispanic/Latino	630	11.49	2,120	10.37	3,015	10.70	1,109	12.75	2,844	12.64	4,062	11.33
2010 Est. HHs by HH Income	5,484		20,434		28,170		8,700		22,507		35,840	
Income Less than \$15,000	774	14.11	2,227	10.90	2,858	10.15	936	10.76	2,452	10.89	3,628	10.12
Income \$15,000 - \$24,999	523	9.54	1,713	8.38	2,298	8.16	769	8.84	2,060	9.15	3,011	8.40
Income \$25,000 - \$34,999	451	8.22	1,546	7.57	2,385	8.47	768	8.83	2,135	9.49	3,051	8.51
Income \$35,000 - \$49,999	698	12.73	2,476	12.12	3,474	12.33	1,143	13.14	2,992	13.29	4,747	13.24
Income \$50,000 - \$74,999	891	16.25	3,412	16.70	4,828	17.14	1,624	18.67	3,933	17.47	6,394	17.84
Income \$75,000 - \$99,999	673	12.27	2,760	13.51	3,768	13.38	1,250	14.37	3,002	13.34	4,761	13.28
Income \$100,000 - \$124,999	435	7.93	1,990	9.74	2,804	9.95	762	8.76	2,023	8.99	3,504	9.78
Income \$125,000 - \$149,999	340	6.20	1,387	6.79	1,911	6.78	509	5.85	1,346	5.98	2,340	6.53
Income \$150,000 - \$199,999	386	7.04	1,448	7.09	1,909	6.78	495	5.69	1,334	5.93	2,193	6.12
Income \$200,000 - \$499,999	265	4.83	1,235	6.04	1,613	5.73	388	4.46	1,043	4.63	1,832	5.11
Income \$500,000 and more	47	0.86	240	1.17	321	1.14	57	0.66	186	0.83	378	1.05
2010 Est. Average Household Income	\$80,437		\$89,106		\$88,073		\$79,595		\$80,637		\$84,876	
2010 Est. Median Household Income	\$58,296		\$66,521		\$65,894		\$61,308		\$60,260		\$63,616	
2010 Est. Per Capita Income	\$33,431		\$34,969		\$34,738		\$32,628		\$33,223		\$34,102	

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Description	West Zone - Cabrillo Highway						East Zone - Soguel Avenue					
	0.00 - 1.00 miles		0.00 - 2.00 miles		0.00 - 3.00 miles		0.00 - 1.00 miles		0.00 - 2.00 miles		0.00 - 3.00 miles	
	Radius 1	%	Radius 2	%	Radius 3	%	Radius 1	%	Radius 2	%	Radius 3	%
2010 Median HH Inc by Single Race Class. or Ethn												
White Alone	59,099		69,216		68,441		62,966		62,573		65,903	
Black or African American Alone	65,972		57,465		57,625		68,598		56,579		55,963	
American Indian and Alaska Native Alone	62,500		65,625		65,682		70,833		66,912		65,909	
Asian Alone	63,281		62,882		60,405		66,369		56,025		61,491	
Native Hawaiian, Other Pacific Islander Alone	42,500		55,357		61,029		55,357		60,833		58,854	
Some Other Race Alone	43,667		46,337		47,885		46,880		46,879		47,990	
Two or More Races	64,063		49,591		48,610		49,605		46,290		47,028	
Hispanic or Latino	58,026		51,484		49,697		52,475		48,142		49,852	
Not Hispanic or Latino	58,318		68,398		67,992		62,526		62,267		65,555	
2010 Est. Family HH Type, Presence Own Children	2,545		10,225		14,561		4,325		11,303		18,716	
Married-Couple Family, own children	726	28.53	2,992	29.26	4,289	29.46	1,276	29.50	3,313	29.31	5,497	29.37
Married-Couple Family, no own children	1,138	44.72	4,557	44.57	6,537	44.89	1,742	40.28	4,829	42.72	8,173	43.67
Male Householder, own children	92	3.61	411	4.02	587	4.03	214	4.95	514	4.55	787	4.20
Male Householder, no own children	82	3.22	317	3.10	425	2.92	152	3.51	358	3.17	560	2.99
Female Householder, own children	309	12.14	1,194	11.68	1,656	11.37	590	13.64	1,405	12.43	2,251	12.03
Female Householder, no own children	197	7.74	754	7.37	1,068	7.33	352	8.14	884	7.82	1,448	7.74
2010 Est. Households by Household Size	5,484		20,434		28,170		8,700		22,507		35,840	
1-person household	1,876	34.21	6,369	31.17	8,708	30.91	2,750	31.61	7,208	32.03	11,073	30.90
2-person household	1,790	32.64	6,856	33.55	9,418	33.43	2,878	33.08	7,424	32.99	11,971	33.40
3-person household	825	15.04	3,296	16.13	4,565	16.21	1,358	15.61	3,537	15.72	5,861	16.35
4-person household	558	10.18	2,319	11.35	3,246	11.52	972	11.17	2,460	10.93	4,120	11.50
5-person household	234	4.27	895	4.38	1,259	4.47	386	4.44	1,023	4.55	1,604	4.48
6-person household	102	1.86	377	1.84	530	1.88	165	1.90	443	1.97	669	1.87
7 or more person household	98	1.79	322	1.58	444	1.58	191	2.20	413	1.83	540	1.51
2010 Est. Average Household Size	2.32		2.38		2.39		2.41		2.38		2.39	

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Appendix Table 14H: Pop-Facts: Demographic Overview Report
West Zone and East Zone

Description	West Zone - Cabrillo Highway						East Zone - Soguel Avenue					
	0.00 - 1.00 miles Radius 1	%	0.00 - 2.00 miles Radius 2	%	0.00 - 3.00 miles Radius 3	%	0.00 - 1.00 miles Radius 1	%	0.00 - 2.00 miles Radius 2	%	0.00 - 3.00 miles Radius 3	%
2010 Est. Households by Presence of People Households with 1 or more People under Age 18	5,484	22.03	20,434	23.91	28,170	24.76	8,700	25.40	22,507	24.84	35,840	25.45
Married-Couple Family	1,208	62.67	4,886	63.59	6,976	64.22	2,210	59.68	5,591	61.80	9,120	63.06
Other Family, Male Householder	757	8.94	3,107	9.41	4,480	9.42	1,319	10.86	3,455	10.34	5,751	9.64
Other Family, Female Householder	108	27.32	460	25.93	657	25.30	240	28.37	578	26.76	879	26.28
Nonfamily, Male Householder	330	8	1,267	0.59	1,765	41	627	0.50	1,496	33	52	0.57
Nonfamily, Female Householder	8	0.66	29	0.47	41	0.46	11	0.59	29	0.52	40	0.44
	5	0.41	23		32		13					
Households no People under Age 18:												
Married-Couple Family	4,276	77.97	15,549	76.09	21,194	75.24	6,491	74.61	16,916	75.16	26,719	74.55
Other Family, Male Householder	1,116	26.10	4,492	28.89	6,430	30.34	1,715	26.42	4,732	27.97	8,015	30.00
Other Family, Female Householder	65	1.52	254	1.63	339	1.60	121	1.86	279	1.65	452	1.69
Nonfamily, Male Householder	180	4.21	687	4.42	972	4.59	315	4.85	796	4.71	1,319	4.94
Nonfamily, Female Householder	1,428	33.40	4,903	31.53	6,395	30.17	2,027	31.23	5,251	31.04	8,011	29.98
	1,486	34.75	5,213	33.53	7,058	33.30	2,313	35.63	5,858	34.63	8,923	33.40
2010 Est. Households by Number of Vehicles	5,484		20,434		28,170		8,700		22,507		35,840	
No Vehicles	758	13.82	1,918	9.39	2,340	8.31	924	10.62	2,063	9.17	2,907	8.11
1 Vehicle	1,777	32.40	6,703	32.80	9,123	32.39	2,879	33.09	7,619	33.85	11,705	32.66
2 Vehicles	1,942	35.41	7,969	39.00	10,995	39.03	3,385	38.91	8,529	37.89	13,980	39.01
3 Vehicles	704	12.84	2,629	12.87	3,916	13.90	1,139	13.09	3,054	13.57	5,041	14.07
4 Vehicles	209	3.81	777	3.80	1,179	4.19	238	2.74	861	3.83	1,479	4.13
5 or more Vehicles	93	1.70	439	2.15	618	2.19	134	1.54	381	1.69	727	2.03
2010 Est. Average Number of Vehicles	1.67		1.77		1.82		1.70		1.76		1.82	
Family Households												
2015 Projection	2,645		10,506		14,879		4,392		11,538		18,986	
2010 Estimate	2,545		10,225		14,561		4,325		11,303		18,716	
2000 Census	2,388		9,854		14,231		4,294		11,078		18,621	
1990 Census	2,201		9,226		13,387		3,993		10,382		17,634	
Growth 2010-2015	3.93%		2.75%		2.18%		1.55%		2.08%		1.44%	
Growth 2000-2010	6.57%		3.76%		2.32%		0.72%		2.03%		0.51%	
Growth 1990-2000	8.50%		6.81%		6.30%		7.54%		6.70%		5.60%	
2010 Est. Families by Poverty Status	2,545		10,225		14,561		4,325		11,303		18,716	
2010 Families at or Above Poverty	2,298	90.29	9,477	92.68	13,557	93.10	3,944	91.19	10,398	91.99	17,404	92.99
2010 Families at or Above Poverty with Children	1,017	39.96	4,180	40.88	5,950	40.86	1,833	42.38	4,704	41.62	7,766	41.49
2010 Families Below Poverty	247	9.71	748	7.32	1,004	6.90	381	8.81	905	8.01	1,312	7.01
2010 Families Below Poverty with Children	207	8.13	658	6.44	876	6.02	335	7.75	796	7.04	1,136	6.07

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Appendix Table 14i: Pop-Facts: Demographic Overview Report
West Zone and East Zone

Description	West Zone - Cabrillo Highway						East Zone - Soquel Avenue					
	0.00 - 1.00 miles Radius 1	%	0.00 - 2.00 miles Radius 2	%	0.00 - 3.00 miles Radius 3	%	0.00 - 1.00 miles Radius 1	%	0.00 - 2.00 miles Radius 2	%	0.00 - 3.00 miles Radius 3	%
2010 Est. Pop Age 16+ by Employment Status	11,469		45,556		62,265		18,065		46,918		76,971	
In Armed Forces	12	0.10	37	0.08	80	0.13	17	0.09	96	0.20	126	0.16
Civilian - Employed	7,302	63.67	29,304	64.33	39,841	63.99	12,182	67.43	30,652	65.33	49,985	64.94
Civilian - Unemployed	437	3.81	2,075	4.55	2,636	4.23	599	3.32	1,717	3.66	3,049	3.96
Not in Labor Force	3,718	32.42	14,139	31.04	19,709	31.65	5,267	29.16	14,453	30.80	23,811	30.94
2010 Est. Civ Employed Pop 16+ Class of Worker	7,329		29,318		39,873		12,193		30,724		50,004	
For-Profit Private Workers	4,210	57.44	16,221	55.33	22,593	56.66	7,305	59.91	18,469	60.11	29,336	58.67
Non-Profit Private Workers	641	8.75	2,473	8.44	3,401	8.53	1,040	8.53	2,585	8.41	4,037	8.07
Local Government Workers	689	9.40	2,989	10.20	4,031	10.11	1,328	10.89	3,031	9.87	4,978	9.96
State Government Workers	762	10.40	3,469	11.83	4,112	10.31	778	6.38	2,310	7.52	4,395	8.79
Federal Government Workers	44	0.60	179	0.61	273	0.68	83	0.68	205	0.67	366	0.73
Self-Emp Workers	980	13.37	3,938	13.43	5,399	13.54	1,651	13.54	4,086	13.30	6,807	13.61
Unpaid Family Workers	2	0.03	49	0.17	63	0.16	9	0.07	37	0.12	86	0.17
2010 Est. Civ Employed Pop 16+ by Occupation	7,329		29,318		39,873		12,193		30,724		50,004	
Architect/Engineer	233	3.18	714	2.44	965	2.42	333	2.73	761	2.48	1,261	2.52
Arts/Entertain/Sports	299	4.08	1,169	3.99	1,545	3.87	421	3.45	1,178	3.83	1,864	3.73
Building Grounds Maint	408	5.57	1,223	4.17	1,644	4.12	612	5.02	1,535	5.00	2,095	4.19
Business/Financial Ops	240	3.27	1,189	4.06	1,680	4.21	409	3.35	1,162	3.78	2,174	4.35
Community/Soc Svcs	203	2.77	729	2.49	1,004	2.52	260	2.13	743	2.42	1,218	2.44
Computer/Mathematical	301	4.11	1,120	3.82	1,436	3.60	407	3.34	955	3.11	1,671	3.34
Construction/Extraction	290	3.96	1,438	4.90	2,071	5.19	731	6.00	1,737	5.65	2,655	5.31
Edu/Training/Library	822	11.22	3,354	11.44	4,175	10.47	1,099	9.01	2,742	8.92	4,682	9.36
Farm/Fish/Forestry	71	0.97	282	0.96	357	0.90	132	1.08	276	0.90	403	0.81
Food Prep/Serving	501	6.84	2,141	7.30	2,739	6.87	933	7.65	2,357	7.67	3,504	7.01
Health Practitioner/Tec	211	2.88	1,002	3.42	1,543	3.87	480	3.94	1,161	3.78	1,996	3.99
Healthcare Support	164	2.24	512	1.75	698	1.75	222	1.82	668	2.17	964	1.93
Maintenance Repair	109	1.49	449	1.53	707	1.77	279	2.29	592	1.93	929	1.86
Legal	131	1.79	447	1.52	577	1.45	179	1.47	427	1.39	669	1.34
Life/Phys/Soc Science	167	2.28	786	2.68	941	2.36	237	1.94	615	2.00	1,058	2.12
Management	718	9.80	3,110	10.61	4,123	10.34	1,295	10.62	3,091	10.06	5,093	10.19
Office/Admin Support	853	11.64	2,877	9.81	4,012	10.06	1,174	9.63	2,970	9.67	5,193	10.39
Production	329	4.49	952	3.25	1,445	3.62	429	3.52	1,205	3.92	1,834	3.67
Protective Svcs	79	1.08	419	1.43	693	1.74	224	1.84	579	1.88	911	1.82
Sales/Related	807	11.01	3,420	11.67	4,618	11.58	1,484	12.17	3,649	11.88	5,911	11.82
Personal Care/Svc	232	3.17	1,341	4.57	1,870	4.69	491	4.03	1,388	4.52	2,477	4.95
Transportation/Moving	162	2.21	647	2.21	1,030	2.58	364	2.99	932	3.03	1,442	2.88

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Description	West Zone - Cabrillo Highway						East Zone - Soguel Avenue					
	0.00 - 1.00 miles		0.00 - 2.00 miles		0.00 - 3.00 miles		0.00 - 1.00 miles		0.00 - 2.00 miles		0.00 - 3.00 miles	
	Radius 1	%	Radius 2	%	Radius 3	%	Radius 1	%	Radius 2	%	Radius 3	%
2010 Est. Pop 16+ by Occupation Classification	7,329		29,318		39,873		12,193		30,724		50,004	
Blue Collar	890	12.14	3,486	11.89	5,254	13.18	1,802	14.78	4,466	14.54	6,860	13.72
White Collar	4,984	68.00	19,914	67.92	26,618	66.76	7,777	63.78	19,454	63.32	32,791	65.58
Service and Farm	1,455	19.85	5,918	20.19	8,001	20.07	2,614	21.44	6,804	22.15	10,353	20.70
2010 Est. Workers Age 16+, Transp. To Work	7,201		28,651		38,990		12,031		30,065		48,925	
Drove Alone	4,453	61.84	17,777	62.05	25,188	64.60	7,950	66.08	19,914	66.24	32,415	66.25
Car Pooled	640	8.89	2,638	9.21	3,594	9.22	1,121	9.32	2,820	9.38	4,603	9.41
Public Transportation	444	6.17	1,841	6.43	2,183	5.60	614	5.10	1,529	5.09	2,329	4.76
Walked	501	6.96	2,208	7.71	2,478	6.36	650	5.40	1,603	5.33	2,733	5.59
Bicycle	706	9.80	2,235	7.80	2,896	7.43	1,011	8.40	2,387	7.94	3,431	7.01
Other Means	31	0.43	191	0.67	312	0.80	75	0.62	236	0.78	398	0.81
Worked at Home	426	5.92	1,761	6.15	2,338	6.00	611	5.08	1,576	5.24	3,015	6.16
2010 Est. Workers Age 16+ by Travel Time to Work *												
Less than 15 Minutes	2,646		10,199		13,480		4,416		10,449		16,466	
15 - 29 Minutes	2,406		9,163		12,453		3,734		9,563		15,908	
30 - 44 Minutes	727		3,566		4,864		1,456		3,870		6,029	
45 - 59 Minutes	552		2,043		2,889		1,015		2,228		3,732	
60 or more Minutes	501		2,174		3,305		885		2,603		4,211	
2010 Est. Avg Travel Time to Work in Minutes	23.60		24.29		25.08		24.66		25.41		25.26	
2010 Est. Tenure of Occupied Housing Units	5,484		20,434		28,170		8,700		22,507		35,840	
Owner Occupied	2,327	42.43	9,340	45.71	13,789	48.95	3,545	40.75	10,136	45.03	17,819	49.72
Renter Occupied	3,156	57.55	11,095	54.30	14,381	51.05	5,155	59.25	12,371	54.97	18,020	50.28
2010 Owner Occ. HUs: Avg. Length of Residence	14		14		15		14		14		15	
2010 Renter Occ. HUs: Avg. Length of Residence	7		7		7		7		7		7	

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Appendix Table 14K: Pop-Facts: Demographic Overview Report
West Zone and East Zone

Description	West Zone - Cabrillo Highway						East Zone - Soguel Avenue					
	0.00 - 1.00 miles		1.00 - 2.00 miles		2.00 - 3.00 miles		0.00 - 1.00 miles		1.00 - 2.00 miles		2.00 - 3.00 miles	
	Radius 1	%	Radius 2	%	Radius 3	%	Radius 1	%	Radius 2	%	Radius 3	%
2010 Est. All Owner-Occupied Housing Values	2,327		9,340		13,789		3,545		10,136		17,819	
Value Less than \$20,000	4	0.17	28	0.30	71	0.51	5	0.14	48	0.47	95	0.53
Value \$20,000 - \$39,999	25	1.07	33	0.35	71	0.51	12	0.34	71	0.70	142	0.80
Value \$40,000 - \$59,999	24	1.03	52	0.56	127	0.92	20	0.56	137	1.35	290	1.63
Value \$60,000 - \$79,999	23	0.99	29	0.31	50	0.36	11	0.31	59	0.58	197	1.11
Value \$80,000 - \$99,999	20	0.86	37	0.40	83	0.60	6	0.17	90	0.89	241	1.35
Value \$100,000 - \$149,999	19	0.82	62	0.66	275	1.99	27	0.76	257	2.54	557	3.13
Value \$150,000 - \$199,999	16	0.69	59	0.63	181	1.31	26	0.73	170	1.68	309	1.73
Value \$200,000 - \$299,999	103	4.43	378	4.05	749	5.43	106	2.99	624	6.16	1,118	6.27
Value \$300,000 - \$399,999	199	8.55	732	7.84	1,038	7.53	325	9.17	774	7.64	1,344	7.54
Value \$400,000 - \$499,999	302	12.98	1,309	14.01	1,896	13.75	663	18.70	1,552	15.31	2,342	13.14
Value \$500,000 - \$749,999	913	39.24	3,995	42.77	5,440	39.45	1,605	45.28	3,899	38.47	6,633	37.22
Value \$750,000 - \$999,999	443	19.04	1,567	16.78	2,263	16.41	487	13.74	1,512	14.92	2,889	15.09
Value \$1,000,000 or more	236	10.14	1,060	11.35	1,546	11.21	252	7.11	945	9.32	1,861	10.44
2010 Est. Median All Owner-Occupied Housing Value	\$617,341		\$622,122		\$608,183		\$589,041		\$582,532		\$585,714	
2010 Est. Housing Units by Units in Structure	5,776		21,894		30,374		9,247		24,269		38,768	
1 Unit Attached	513	8.88	1,821	8.32	2,744	9.03	871	9.42	2,303	9.49	3,664	9.45
1 Unit Detached	2,824	48.89	11,988	54.75	16,854	55.49	4,684	50.65	12,167	50.13	20,512	52.91
2 Units	252	4.36	1,021	4.66	1,360	4.48	585	6.33	1,287	5.30	1,764	4.55
3 or 4 Units	557	9.64	1,985	9.07	2,396	7.89	981	10.61	2,055	8.47	3,447	8.89
5 to 19 Units	749	12.97	2,939	13.42	3,489	11.49	1,150	12.44	3,099	12.77	4,066	10.49
20 to 49 Units	392	6.79	1,051	4.80	1,401	4.61	462	5.00	1,388	5.72	1,694	4.37
50 or More Units	391	6.77	865	3.95	1,234	4.06	403	4.36	1,126	4.64	1,541	3.97
Mobile Home or Trailer	95	1.64	204	0.93	864	2.84	102	1.10	822	3.39	2,045	5.27
Boat, RV, Van, etc.	1	0.02	20	0.09	33	0.11	10	0.11	23	0.09	35	0.09
2010 Est. Housing Units by Year Structure Built	5,776		21,894		30,374		9,247		24,269		38,768	
Housing Unit Built 2000 or later	627	10.86	1,785	8.15	2,158	7.10	577	6.24	1,748	7.20	2,290	5.91
Housing Unit Built 1990 to 1999	394	6.82	1,653	7.55	2,290	7.54	467	5.05	1,715	7.07	2,862	7.38
Housing Unit Built 1980 to 1989	454	7.86	2,041	9.32	3,582	11.79	914	9.88	2,828	11.65	4,864	12.55
Housing Unit Built 1970 to 1979	1,061	18.37	3,901	17.82	5,875	19.34	1,684	18.21	4,372	18.01	8,032	20.72
Housing Unit Built 1960 to 1969	566	9.80	2,666	12.18	4,158	13.69	1,035	11.19	3,188	13.14	5,886	15.18
Housing Unit Built 1950 to 1959	742	12.85	2,915	13.31	3,987	13.13	1,254	13.56	3,249	13.39	5,190	13.39
Housing Unit Built 1940 to 1949	475	8.22	2,079	9.50	2,688	8.85	1,050	11.36	2,298	9.47	3,321	8.57
Housing Unit Built 1939 or Earlier	1,457	25.23	4,854	22.17	5,636	18.56	2,265	24.49	4,872	20.07	6,322	16.31
2010 Est. Median Year Structure Built **	1964		1964		1967		1961		1965		1968	

**This row intentionally left blank. No total category data is available.

**1939 will appear when at least half of the Housing Units in this reports area were built in 1939 or earlier.

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Description	Central Zone - Pacific Avenue						Waterfront Zone - Beach Street					
	Radius 1	%	Radius 2	%	Radius 3	%	Radius 1	%	Radius 2	%	Radius 3	%
Population												
2015 Projection	25,308		57,236		80,704		20,351		53,398		82,720	
2010 Estimate	24,590		56,211		79,391		19,911		52,638		81,479	
2000 Census	23,507		55,058		78,135		19,323		52,064		80,484	
1990 Census	19,923		49,480		71,144		16,584		46,738		73,170	
Growth 2010-2015	2.92%		1.82%		1.65%		2.21%		1.44%		1.52%	
Growth 2000-2010	4.61%		2.09%		1.61%		3.04%		1.10%		1.24%	
Growth 1990-2000	17.99%		11.27%		9.83%		16.52%		11.40%		10.00%	
2010 Est. Pop by Single Race Class	24,590		56,211		79,391		19,911		52,638		81,479	
White Alone	18,124	73.70	43,347	77.11	60,727	76.49	14,948	75.07	40,795	77.50	62,206	76.35
Black or African American Alone	509	2.07	960	1.71	1,245	1.57	425	2.13	883	1.68	1,278	1.57
Amer. Indian and Alaska Native Alone	249	1.01	454	0.81	665	0.84	197	0.99	435	0.83	686	0.84
Asian Alone	1,091	4.44	2,892	5.14	4,215	5.31	825	4.14	2,255	4.28	4,229	5.19
Native Hawaiian and Other Pac. Isl. Alone	48	0.20	103	0.18	142	0.18	35	0.18	100	0.19	147	0.18
Some Other Race Alone	3,191	12.98	5,430	9.66	7,990	10.06	2,346	11.78	5,364	10.19	8,380	10.28
Two or More Races	1,378	5.60	3,025	5.38	4,407	5.55	1,134	5.70	2,808	5.33	4,553	5.59
2010 Est. Pop Hisp or Latino by Origin	24,590		56,211		79,391		19,911		52,638		81,479	
Not Hispanic or Latino	18,646	75.83	45,950	81.75	64,265	80.95	15,195	76.31	42,481	80.70	65,700	80.63
Hispanic or Latino:	5,944	24.17	10,261	18.25	15,126	19.05	4,715	23.68	10,157	19.30	15,780	19.37
Mexican	5,209	87.63	8,833	86.08	13,090	86.54	4,165	88.34	8,817	86.81	13,654	86.53
Puerto Rican	51	0.86	102	0.99	155	1.02	39	0.83	95	0.94	161	1.02
Cuban	12	0.20	29	0.28	39	0.26	6	0.13	24	0.24	41	0.26
All Other Hispanic or Latino	672	11.31	1,297	12.64	1,843	12.18	505	10.71	1,222	12.03	1,924	12.19
2010 Est. Hisp or Latino by Single Race Class	5,944		10,261		15,126		4,715		10,157		15,780	
White Alone	2,231	37.53	3,872	37.74	5,699	37.68	1,938	41.10	3,869	38.09	5,897	37.37
Black or African American Alone	43	0.72	65	0.63	96	0.63	41	0.87	62	0.61	99	0.63
American Indian and Alaska Native Alone	153	2.57	225	2.19	292	1.93	133	2.82	222	2.19	297	1.88
Asian Alone	34	0.57	87	0.85	121	0.80	22	0.47	75	0.74	121	0.77
Native Hawaiian, Other Pacific Islander Alone	2	0.03	20	0.19	20	0.13	1	0.02	19	0.19	20	0.13
Some Other Race Alone	3,120	52.49	5,188	50.56	7,658	50.63	2,288	48.53	5,140	50.61	8,039	50.94
Two or More Races	361	6.07	804	7.84	1,240	8.20	291	6.17	769	7.57	1,306	8.28

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Appendix Table 15B: Pop-Facts: Demographic Overview Report
Central Zone and Waterfront Zone

Description	Central Zone - Pacific Avenue						Waterfront Zone - Beach Street					
	0.00 - 1.00 miles		1.00 - 2.00 miles		2.00 - 3.00 miles		0.00 - 1.00 miles		1.00 - 2.00 miles		2.00 - 3.00 miles	
	Radius 1	%	Radius 2	%	Radius 3	%	Radius 1	%	Radius 2	%	Radius 3	%
Chinese, except Taiwanese	283	25.94	858	29.67	1,230	29.18	187	22.67	598	26.52	1,217	28.78
Filipino	178	16.32	535	18.50	869	20.62	155	18.79	425	18.85	888	21.00
Japanese	196	17.97	463	16.01	643	15.26	129	15.64	393	17.43	644	15.23
Asian Indian	194	17.78	382	13.21	486	11.53	161	19.52	322	14.28	478	11.30
Korean	95	8.71	247	8.54	364	8.64	79	9.58	209	9.27	365	8.63
Vietnamese	48	4.40	129	4.46	216	5.12	37	4.48	89	3.95	226	5.34
Cambodian	4	0.37	16	0.55	44	1.04	4	0.48	18	0.80	50	1.18
Hmong	0	0.00	1	0.03	2	0.05	0	0.00	1	0.04	2	0.05
Laotian	5	0.46	14	0.48	20	0.47	5	0.61	8	0.35	19	0.45
Thai	31	2.84	68	2.35	86	2.04	17	2.06	63	2.79	88	2.08
All Other Asian Races Including 2+ Category	57	5.22	179	6.19	256	6.07	52	6.30	129	5.72	252	5.96
2010 Est. Population by Ancestry	24,590		56,211		79,391		19,911		52,638		81,479	
Pop. Arab	81	0.33	202	0.36	264	0.33	59	0.30	176	0.33	270	0.33
Pop. Czech	39	0.16	180	0.32	326	0.41	27	0.14	138	0.26	321	0.39
Pop. Danish	323	1.31	569	1.01	708	0.89	240	1.21	534	1.01	735	0.90
Pop. Dutch	219	0.89	484	0.86	661	0.83	161	0.81	458	0.87	690	0.85
Pop. English	1,585	6.45	4,005	7.12	6,005	7.56	1,184	5.95	3,840	7.30	6,231	7.65
Pop. French (except Basque)	599	2.44	1,282	2.28	1,859	2.34	471	2.37	1,220	2.32	1,983	2.43
Pop. French Canadian	142	0.58	317	0.56	455	0.57	122	0.61	290	0.55	466	0.57
Pop. German	1,995	8.11	5,348	9.51	7,948	10.01	1,618	8.13	4,939	9.38	8,213	10.08
Pop. Greek	106	0.43	246	0.44	302	0.38	77	0.39	238	0.45	306	0.38
Pop. Hungarian	49	0.20	127	0.23	191	0.24	33	0.17	116	0.22	207	0.25
Pop. Irish	1,980	8.05	4,906	8.73	6,881	8.67	1,541	7.74	4,633	8.80	7,161	8.79
Pop. Italian	1,482	6.03	3,640	6.48	4,913	6.19	1,205	6.05	3,380	6.42	5,017	6.16
Pop. Lithuanian	22	0.09	49	0.09	84	0.11	22	0.11	45	0.09	84	0.10
Pop. United States or American	511	2.08	1,429	2.54	2,049	2.58	378	1.90	1,336	2.54	2,122	2.60
Pop. Norwegian	358	1.46	645	1.15	889	1.12	281	1.41	618	1.17	941	1.15
Pop. Polish	484	1.97	979	1.74	1,274	1.60	393	1.97	912	1.73	1,289	1.58
Pop. Portuguese	265	1.08	860	1.53	1,240	1.56	211	1.06	815	1.55	1,289	1.58
Pop. Russian	447	1.82	1,191	2.12	1,516	1.91	305	1.53	1,048	1.99	1,510	1.85
Pop. Scottish	461	1.87	1,281	2.28	1,824	2.30	335	1.68	1,250	2.37	1,856	2.28
Pop. Scotch-Irish	296	1.20	687	1.22	946	1.19	231	1.16	649	1.23	969	1.19
Pop. Slovak	7	0.03	35	0.06	51	0.06	2	0.01	38	0.07	56	0.07
Pop. Sub-Saharan African	107	0.44	266	0.47	348	0.44	77	0.39	252	0.48	343	0.42
Pop. Swedish	319	1.30	890	1.58	1,202	1.51	254	1.28	796	1.51	1,199	1.47
Pop. Swiss	118	0.48	299	0.53	410	0.52	98	0.49	304	0.58	412	0.51
Pop. Ukrainian	47	0.19	132	0.23	204	0.26	43	0.22	116	0.22	199	0.24
Pop. Welsh	81	0.33	231	0.41	368	0.46	68	0.34	201	0.38	393	0.48
Pop. West Indian (exc Hlsp groups)	2	0.01	7	0.01	11	0.01	2	0.01	7	0.01	12	0.01
Pop. Other ancestries	11,125	45.24	22,570	40.15	31,668	39.89	9,327	46.84	21,114	40.11	32,287	39.63

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Sun Mar 20, 2011

Central Zone and Waterfront Zone

Description	Central Zone - Pacific Avenue						Waterfront Zone - Beach Street					
	0.00 - 1.00 miles	1.00 - 2.00 miles	2.00 - 3.00 miles	0.00 - 1.00 miles	1.00 - 2.00 miles	2.00 - 3.00 miles	0.00 - 1.00 miles	1.00 - 2.00 miles	2.00 - 3.00 miles	0.00 - 1.00 miles	1.00 - 2.00 miles	2.00 - 3.00 miles
	Radius 1	%	Radius 2	%	Radius 3	%	Radius 1	%	Radius 2	%	Radius 3	%
Pop. Ancestry Unclassified	1,338	5.44	3,353	5.97	4,794	6.04	1,144	5.75	3,174	6.03	4,921	6.04
2010 Est. Pop Age 5+ by Language Spoken At Home												
Speak Only English at Home	16,761	72.04	41,583	77.90	58,633	77.89	18,838	72.64	38,858	77.91	60,124	77.88
Speak Asian/Pac. Isl. Lang. at Home	456	1.96	1,298	2.43	1,872	2.49	396	2.10	996	2.00	1,853	2.40
Speak Indo-European Language at Home	1,043	4.48	2,449	4.59	3,160	4.20	870	4.62	2,244	4.50	3,184	4.12
Speak Spanish at Home	4,930	21.19	7,753	14.52	11,211	14.89	3,828	20.32	7,539	15.12	11,648	15.09
Speak Other Language at Home	76	0.33	297	0.56	399	0.53	63	0.33	236	0.47	388	0.50
2010 Est. Population by Sex												
Male	24,590		56,211		79,391		19,911		52,638		81,479	
Female	12,641	51.41	28,190	50.15	39,664	49.96	10,203	51.24	26,522	50.39	40,784	50.05
	11,949	48.59	28,021	49.85	39,727	50.04	9,708	48.76	26,116	49.61	40,695	49.95
2010 Est. Population by Age												
Age 0 - 4	1,324	5.38	2,832	5.04	4,116	5.18	1,072	5.38	2,765	5.25	4,282	5.26
Age 5 - 9	1,245	5.06	2,662	4.74	3,848	4.85	1,012	5.08	2,608	4.95	4,000	4.91
Age 10 - 14	1,140	4.64	2,488	4.43	3,596	4.53	918	4.61	2,430	4.62	3,741	4.59
Age 15 - 17	474	1.93	1,380	2.46	2,104	2.65	372	1.87	1,304	2.48	2,169	2.66
Age 18 - 20	1,137	4.62	3,899	6.94	6,025	7.59	917	4.61	2,193	4.17	5,712	7.01
Age 21 - 24	2,248	9.14	4,376	7.78	5,870	7.39	1,832	9.20	3,905	7.42	5,870	7.20
Age 25 - 34	4,628	18.82	9,066	16.13	12,089	15.23	3,773	18.95	8,855	16.82	12,548	15.40
Age 35 - 44	3,980	16.19	8,223	14.63	11,234	14.15	3,226	16.20	8,070	15.33	11,744	14.41
Age 45 - 54	3,211	13.06	7,992	14.22	11,268	14.19	2,550	12.81	7,636	14.51	11,704	14.36
Age 55 - 64	3,157	12.84	7,734	13.76	10,798	13.60	2,547	12.79	7,413	14.08	11,106	13.63
Age 65 - 74	1,169	4.75	3,110	5.53	4,484	5.65	948	4.76	2,999	5.70	4,593	5.64
Age 75 - 84	524	2.13	1,551	2.76	2,406	3.03	443	2.22	1,538	2.92	2,438	2.99
Age 85 and over	352	1.43	898	1.60	1,553	1.96	301	1.51	924	1.76	1,573	1.93
Age 16 and over	20,724	84.28	47,742	84.93	67,097	84.51	16,786	84.31	44,379	84.31	68,693	84.31
Age 18 and over	20,407	82.99	46,849	83.34	65,727	82.79	16,536	83.05	43,532	82.70	67,288	82.58
Age 21 and over	19,270	78.37	42,950	76.41	59,702	75.20	15,619	78.44	41,339	78.53	61,576	75.57
Age 65 and over	2,046	8.32	5,559	9.89	8,443	10.63	1,692	8.50	5,460	10.37	8,605	10.56
2010 Est. Median Age	35.25		36.71		36.82		35.19		37.80		37.06	
2010 Est. Average Age	36.90		38.00		38.20		37.00		38.70		38.20	

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Appendix Table 15D: Pop-Facts: Demographic Overview Report
Central Zone and Waterfront Zone

Description	Central Zone - Pacific Avenue						Waterfront Zone - Beach Street					
	0.00 - 1.00 miles		0.00 - 2.00 miles		0.00 - 3.00 miles		0.00 - 1.00 miles		0.00 - 2.00 miles		0.00 - 3.00 miles	
	Radius 1	%	Radius 2	%	Radius 3	%	Radius 1	%	Radius 2	%	Radius 3	%
Age 0 - 4	692	5.47	1,480	5.25	2,149	5.42	561	5.50	1,449	5.46	2,237	5.48
Age 5 - 9	643	5.09	1,373	4.87	1,985	5.00	519	5.09	1,346	5.08	2,063	5.06
Age 10 - 14	579	4.58	1,266	4.49	1,844	4.65	460	4.51	1,239	4.67	1,926	4.72
Age 15 - 17	246	1.95	715	2.54	1,099	2.77	187	1.83	671	2.53	1,121	2.75
Age 18 - 20	541	4.28	1,795	6.37	2,755	6.95	431	4.22	1,064	4.01	2,635	6.46
Age 21 - 24	1,043	8.25	2,084	7.39	2,865	7.22	827	8.11	1,849	6.97	2,867	7.03
Age 25 - 34	2,556	20.22	4,806	17.05	6,362	16.04	2,074	20.33	4,713	17.77	6,600	16.18
Age 35 - 44	2,117	16.75	4,315	15.31	5,897	14.87	1,712	16.78	4,241	15.99	6,162	15.11
Age 45 - 54	1,713	13.55	4,059	14.40	5,707	14.39	1,388	13.60	3,892	14.67	5,947	14.58
Age 55 - 64	1,650	13.05	3,929	13.94	5,490	13.84	1,342	13.15	3,765	14.20	5,661	13.88
Age 65 - 74	549	4.34	1,471	5.22	2,112	5.32	442	4.33	1,405	5.30	2,158	5.29
Age 75 - 84	215	1.70	629	2.23	953	2.40	181	1.77	615	2.32	960	2.35
Age 85 and over	97	0.77	268	0.95	445	1.12	79	0.77	272	1.03	446	1.09
2010 Est. Median Age, Male	35.10		36.34		36.31		35.25		37.19		36.53	
2010 Est. Average Age, Male	36.40		37.40		37.30		36.60		37.80		37.40	
2010 Est. Female Population by Age	11,949		28,021		39,727		9,708		26,116		40,695	
Age 0 - 4	633	5.30	1,352	4.82	1,966	4.95	511	5.26	1,315	5.04	2,045	5.03
Age 5 - 9	603	5.05	1,288	4.60	1,863	4.69	493	5.08	1,262	4.83	1,936	4.76
Age 10 - 14	561	4.69	1,222	4.36	1,751	4.41	459	4.73	1,191	4.56	1,814	4.46
Age 15 - 17	228	1.91	665	2.37	1,005	2.53	186	1.92	633	2.42	1,048	2.58
Age 18 - 20	596	4.99	2,104	7.51	3,270	8.23	485	5.00	1,128	4.32	3,077	7.56
Age 21 - 24	1,205	10.08	2,292	8.18	3,006	7.57	1,005	10.35	2,055	7.87	3,003	7.38
Age 25 - 34	2,072	17.34	4,260	15.20	5,727	14.42	1,699	17.50	4,142	15.86	5,948	14.62
Age 35 - 44	1,863	15.59	3,908	13.95	5,336	13.43	1,513	15.59	3,829	14.66	5,582	13.72
Age 45 - 54	1,499	12.54	3,933	14.04	5,561	14.00	1,161	11.96	3,745	14.34	5,757	14.15
Age 55 - 64	1,507	12.61	3,805	13.58	5,307	13.36	1,206	12.42	3,648	13.97	5,445	13.38
Age 65 - 74	620	5.19	1,640	5.85	2,373	5.97	506	5.21	1,593	6.10	2,434	5.98
Age 75 - 84	309	2.59	922	3.29	1,453	3.66	263	2.71	923	3.53	1,478	3.63
Age 85 and over	255	2.13	630	2.25	1,107	2.79	222	2.29	652	2.50	1,128	2.77
2010 Est. Median Age, Female	35.42		37.12		37.39		35.11		38.48		37.65	
2010 Est. Average Age, Female	37.50		38.70		39.00		37.40		39.50		39.10	

Description	Central Zone - Pacific Avenue						Waterfront Zone - Beach Street					
	0.00 - 1.00 miles	%	Radius 2	%	Radius 3	%	0.00 - 1.00 miles	%	Radius 2	%	Radius 3	%
Total Never Married	10,794	51.69	22,423	46.49	30,025	44.26	8,953	52.95	20,342	45.37	30,544	43.98
Males, Never Married	5,876	28.15	11,803	24.47	15,912	23.46	4,876	28.84	10,907	24.33	16,288	23.45
Females, Never Married	4,916	23.54	10,620	22.02	14,113	20.81	4,077	24.11	9,435	21.04	14,257	20.53
Married, Spouse present	5,746	27.52	16,271	33.74	23,875	35.20	4,272	25.27	15,276	34.07	24,356	35.07
Married, Spouse absent	1,104	5.29	2,121	4.40	3,023	4.46	848	5.02	1,914	4.27	3,089	4.45
Widowed	764	3.66	1,775	3.68	2,918	4.30	744	4.40	1,793	4.00	3,071	4.42
Males Widowed	157	0.75	342	0.71	587	0.87	137	0.81	314	0.70	606	0.87
Females Widowed	607	2.91	1,433	2.97	2,331	3.44	606	3.58	1,479	3.30	2,465	3.55
Divorced	2,473	11.84	5,640	11.69	7,991	11.78	2,092	12.37	5,510	12.29	8,396	12.09
Males Divorced	1,097	5.25	2,401	4.98	3,361	4.95	985	5.83	2,394	5.34	3,550	5.11
Females Divorced	1,376	6.59	3,239	6.72	4,630	6.83	1,107	6.55	3,116	6.95	4,846	6.98
2010 Est. Pop. Age 25+ by Edu. Attainment	17,022		38,574		53,832		13,788		37,434		55,706	
Less than 9th grade	1,099	6.46	1,631	4.23	2,300	4.27	899	6.52	1,631	4.36	2,423	4.35
Some High School, no diploma	979	5.75	1,651	4.28	2,403	4.46	717	5.20	1,704	4.55	2,562	4.60
High School Graduate (or GED)	2,445	14.36	5,131	13.30	7,866	14.61	1,875	13.60	5,135	13.72	8,211	14.74
Some College, no degree	3,460	20.33	7,797	20.21	11,544	21.44	2,852	20.68	7,682	20.52	12,160	21.83
Associate Degree	1,241	7.29	3,039	7.88	4,434	8.24	1,115	8.09	3,085	8.24	4,625	8.30
Bachelor's Degree	4,604	27.05	11,106	28.79	14,858	27.60	3,871	28.08	10,634	28.41	15,243	27.36
Master's Degree	2,210	12.98	5,165	13.39	6,601	12.26	1,694	12.29	4,794	12.81	6,606	11.86
Professional School Degree	444	2.61	1,317	3.41	1,734	3.22	321	2.33	1,252	3.34	1,829	3.28
Doctorate Degree	541	3.18	1,737	4.50	2,092	3.89	442	3.21	1,519	4.06	2,047	3.67
2010 Est Pop Age 25+ by Edu. Attain, Hisp. or Lat	3,162		5,498		7,989		2,468		5,572		8,380	
Less than 9th grade	909	28.75	1,256	22.84	1,751	21.92	746	30.23	1,264	22.68	1,828	21.81
Some High School, no diploma	389	12.30	614	11.17	921	11.53	271	10.98	639	11.47	972	11.60
High School Graduate (or GED)	562	17.77	972	17.68	1,521	19.04	408	16.53	1,048	18.81	1,608	19.19
Some College, no degree	534	16.89	944	17.17	1,449	18.14	461	18.68	966	17.34	1,532	18.28
Associate Degree	147	4.65	320	5.82	476	5.96	115	4.66	321	5.76	511	6.10
Bachelor's Degree	457	14.45	1,081	19.66	1,426	17.85	397	16.09	1,064	19.10	1,468	17.52
Graduate or Professional Degree	163	5.15	311	5.66	445	5.57	72	2.92	270	4.85	461	5.50

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Description	Central Zone - Pacific Avenue					Waterfront Zone - Beach Street				
	0.00 - 1.00 miles	%	Radius 2	%	Radius 3	0.00 - 1.00 miles	%	Radius 2	%	Radius 3
2015 Projection	10,357		22,734		31,110	8,641		22,081		32,166
2010 Estimate	9,991		22,169		30,454	8,390		21,597		31,542
2000 Census	9,412		21,426		29,702	8,021		21,017		30,896
1990 Census	8,116		19,028		26,773	6,939		18,847		28,066
Growth 2010-2015	3.66%		2.55%		2.15%	2.99%		2.24%		1.98%
Growth 2000-2010	6.15%		3.47%		2.53%	4.60%		2.76%		2.09%
Growth 1990-2000	15.97%		12.60%		10.94%	15.59%		11.51%		10.08%
2010 Est. Households by Household Type										
Family Households	9,991		22,169		30,454	8,390		21,597		31,542
Nonfamily Households	4,207	42.11	10,929	49.30	15,817	3,378	40.26	10,444	48.36	16,313
	5,784	57.89	11,240	50.70	14,636	5,012	59.74	11,153	51.64	15,229
2010 Est. Group Quarters Population										
	1,263		3,807		6,213	745		1,869		5,743
2010 HHs by Ethnicity, Hispanic/Latino										
	1,365	13.66	2,349	10.60	3,473	1,133	13.50	2,384	11.04	3,677
2010 Est. HHs by HH Income										
Income Less than \$15,000	9,991		22,169		30,454	8,390		21,597		31,542
Income \$15,000 - \$24,999	1,444	14.45	2,379	10.73	3,105	1,290	15.38	2,380	11.02	3,303
Income \$25,000 - \$34,999	1,047	10.48	1,856	8.37	2,526	937	11.17	1,864	8.63	2,696
Income \$35,000 - \$49,999	899	9.00	1,800	8.12	2,659	782	9.32	1,844	8.54	2,783
Income \$50,000 - \$74,999	1,318	13.19	2,752	12.41	3,906	1,159	13.81	2,717	12.58	4,095
Income \$75,000 - \$99,999	1,607	16.08	3,752	16.92	5,297	1,317	15.70	3,650	16.90	5,517
Income \$100,000 - \$124,999	1,383	13.84	3,030	13.67	4,067	1,123	13.38	2,958	13.70	4,188
Income \$125,000 - \$149,999	706	7.07	2,110	9.52	2,987	550	6.56	1,993	9.23	3,031
Income \$150,000 - \$199,999	510	5.10	1,452	6.55	2,003	378	4.51	1,372	6.35	2,035
Income \$200,000 - \$499,999	562	5.63	1,487	6.71	1,958	398	4.74	1,408	6.52	1,944
Income \$500,000 and more	428	4.28	1,296	5.85	1,620	377	4.49	1,178	5.45	1,618
	86	0.86	255	1.15	326	77	0.92	233	1.08	330
2010 Est. Average Household Income	\$75,878		\$87,711		\$85,893	\$73,748		\$85,513		\$84,496
2010 Est. Median Household Income	\$54,470		\$65,308		\$64,305	\$50,503		\$63,654		\$63,109
2010 Est. Per Capita Income	\$31,711		\$35,476		\$33,857	\$31,891		\$35,854		\$33,569

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Description	Central Zone - Pacific Avenue						Waterfront Zone - Beach Street					
	0.00 - 1.00 miles	%	Radius 1	0.00 - 2.00 miles	%	Radius 3	0.00 - 1.00 miles	%	Radius 1	0.00 - 2.00 miles	%	Radius 3
White Alone Black or African American Alone American Indian and Alaska Native Alone Asian Alone Native Hawaiian, Other Pacific Islander Alone Some Other Race Alone Two or More Races Hispanic or Latino Not Hispanic or Latino	57,623			67,918		66,934	54,606			66,173		65,714
	52,813			57,418		56,490	46,149			56,250		55,208
	76,136			66,563		65,317	76,705			66,346		65,156
	46,400			59,473		59,503	36,350			56,798		58,984
	61,250			58,333		60,625	63,636			60,000		60,000
	41,774			47,080		47,582	41,964			48,274		47,404
	43,323			48,154		47,000	37,143			46,431		45,966
	45,149			49,489		48,902	44,097			49,323		48,736
	56,596			67,331		66,468	52,406			65,632		65,185
2010 Est. Family HH Type, Presence Own Children	4,207			10,929		15,817	3,378			10,444		16,313
	1,201	28.55		3,165	28.96	4,663	925	27.38		2,983	28.56	4,805
	1,661	39.48		4,826	44.16	6,941	1,335	39.52		4,587	43.92	7,064
	209	4.97		452	4.14	668	422	5.33		454	4.35	704
	171	4.06		350	3.20	475	148	4.38		338	3.24	503
	615	14.62		1,305	11.94	1,872	500	14.80		1,264	12.10	1,974
	350	8.32		829	7.59	1,198	289	8.56		819	7.84	1,263
2010 Est. Households by Household Size	9,991			22,169		30,454	8,390			21,597		31,542
	3,511	35.14		7,087	31.97	9,329	3,097	36.91		7,063	32.70	9,689
	3,198	32.01		7,371	33.25	10,144	2,672	31.85		7,149	33.10	10,488
	1,488	14.89		3,545	15.99	4,986	1,185	14.12		3,391	15.70	5,178
	950	9.51		2,455	11.07	3,537	762	9.08		2,316	10.72	3,648
	417	4.17		948	4.28	1,380	333	3.97		912	4.22	1,425
	208	2.08		406	1.83	587	168	2.00		397	1.84	607
2010 Est. Average Household Size	220	2.20		358	1.61	491	173	2.06		368	1.70	507
	2.33			2.36		2.40	2.28			2.35		2.40

Appendix Table 15H: Pop-Facts: Demographic Overview Report
Central Zone and Waterfront Zone

Description	Central Zone - Pacific Avenue						Waterfront Zone - Beach Street					
	0.00 - 1.00 miles	1.00 - 2.00 miles	2.00 - 3.00 miles	Radius 1	Radius 2	Radius 3	0.00 - 1.00 miles	1.00 - 2.00 miles	2.00 - 3.00 miles	Radius 1	Radius 2	Radius 3
Households with 1 or more People under Age 18:												
Married-Couple Family	2,156	2,158	5,245	23.66	7,697	25.27	1,710	20.38	5,020	23.24	7,996	25.35
Other Family, Male Householder	1,242	57.61	3,295	62.82	4,873	63.31	956	55.91	3,109	61.93	5,021	62.79
Other Family, Female Householder	239	11.09	508	9.69	749	9.73	205	11.99	510	10.16	787	9.84
Nonfamily, Male Householder	644	29.87	1,385	26.41	1,996	25.93	523	30.58	1,347	26.83	2,106	26.34
Nonfamily, Female Householder	17	0.79	31	0.59	45	0.58	15	0.88	31	0.62	45	0.56
	14	0.65	25	0.48	35	0.45	12	0.70	24	0.48	36	0.45
Households no People under Age 18:												
Married-Couple Family	7,835	78.42	16,924	76.34	22,757	74.73	6,679	79.61	16,577	76.76	23,546	74.65
Other Family, Male Householder	1,626	20.75	4,756	28.10	6,812	29.93	1,312	19.64	4,519	27.26	6,925	29.41
Other Family, Female Householder	130	1.66	279	1.65	378	1.66	112	1.68	266	1.60	403	1.71
Nonfamily, Male Householder	316	4.03	756	4.47	1,086	4.77	262	3.92	744	4.49	1,143	4.85
Nonfamily, Female Householder	2,888	36.86	5,359	31.67	6,914	30.38	2,523	37.78	5,275	31.82	7,243	30.76
	2,875	36.69	5,774	34.12	7,567	33.25	2,471	37.00	5,772	34.82	7,832	33.26
2010 Est. Households by Number of Vehicles												
No Vehicles	9,991	22,169	30,454	8.390	21,597	8.390	8,390	13.89	1,996	9.24	2,564	8.13
1 Vehicle	1,370	13.71	2,009	9.06	2,486	8.16	1,165	13.89	1,996	9.24	2,564	8.13
2 Vehicles	3,801	38.04	9,938	33.31	9,938	32.63	3,387	40.37	7,315	33.87	10,401	32.98
3 Vehicles	3,345	33.48	8,554	38.59	11,871	33.98	2,741	32.67	8,232	38.12	12,229	38.77
4 Vehicles	1,034	10.35	2,926	13.20	4,253	13.97	786	9.37	2,827	13.09	4,405	13.97
5 or more Vehicles	301	3.01	844	3.81	1,258	4.13	193	2.30	806	3.73	1,300	4.12
	139	1.39	452	2.04	647	2.12	117	1.39	420	1.94	643	2.04
2010 Est. Average Number of Vehicles												
	1.56	1.78	1.82	1.82	1.82	1.82	1.51	1.76	1.76	1.81	1.81	1.81
Family Households												
2015 Projection	4,341	11,181	16,136	3,459	10,651	16,613	3,459	10,651	16,613	3,459	10,651	16,613
2010 Estimate	4,207	10,929	15,817	3,378	10,444	16,313	3,378	10,444	16,313	3,378	10,444	16,313
2000 Census	4,008	10,647	15,526	3,270	10,251	16,080	3,270	10,251	16,080	3,270	10,251	16,080
1990 Census	3,718	9,991	14,652	3,029	9,659	15,141	3,029	9,659	15,141	3,029	9,659	15,141
Growth 2010-2015	3.19%	2.31%	2.02%	2.40%	1.98%	1.84%	2.40%	1.98%	1.98%	1.84%	1.84%	1.84%
Growth 2000-2010	4.97%	2.65%	1.87%	3.30%	1.88%	1.45%	3.30%	1.88%	1.88%	1.45%	1.45%	1.45%
Growth 1990-2000	7.80%	6.57%	5.97%	7.96%	6.13%	6.20%	7.96%	6.13%	6.13%	6.20%	6.20%	6.20%
2010 Est. Families by Poverty Status												
2010 Families at or Above Poverty	4,207	10,929	15,817	3,378	10,444	16,313	3,378	10,444	16,313	3,378	10,444	16,313
2010 Families at or Above Poverty with Children	3,800	10,147	14,681	92.84	14,681	92.84	3,043	90.08	9,701	92.89	15,095	92.53
	1,779	4,507	6,570	41.24	6,570	41.54	1,372	40.62	4,309	41.26	6,845	41.96
2010 Families Below Poverty	407	9.67	781	7.15	1,137	7.19	334	9.89	744	7.12	1,217	7.46
2010 Families Below Poverty with Children	373	8.87	679	6.21	996	6.30	314	9.30	644	6.17	1,061	6.50

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Appendix Table 15i: Pop-Facts: Demographic Overview Report
Central Zone and Waterfront Zone

Description	Central Zone - Pacific Avenue						Waterfront Zone - Beach Street					
	0.00 - 1.00 miles Radius 1	%	0.00 - 2.00 miles Radius 2	%	0.00 - 3.00 miles Radius 3	%	0.00 - 1.00 miles Radius 1	%	0.00 - 2.00 miles Radius 2	%	0.00 - 3.00 miles Radius 3	%
In Armed Forces	19	0.09	40	0.08	121	0.18	16	0.10	57	0.13	121	0.18
Civilian - Employed	13,684	66.03	31,110	65.16	43,136	64.29	11,467	68.31	29,426	66.31	44,438	64.69
Civilian - Unemployed	832	4.01	1,983	4.15	2,815	4.20	677	4.03	1,599	3.60	2,825	4.11
Not in Labor Force	6,189	29.86	14,609	30.60	21,025	31.34	4,625	27.55	13,297	29.96	21,309	31.02
2010 Est. Civ Employed Pop 16+ Class of Worker	13,716		31,130		43,186		11,479		29,463		44,482	
For-Profit/Private Workers	8,147	59.40	17,555	56.39	24,765	57.34	6,967	60.69	17,079	57.97	25,642	57.65
Non-Profit/Private Workers	1,121	8.17	2,674	8.59	3,614	8.37	963	8.39	2,455	8.33	3,667	8.24
Local Government Workers	1,326	9.67	3,151	10.12	4,339	10.05	1,045	9.10	2,920	9.91	4,458	10.02
State Government Workers	1,380	10.06	3,315	10.65	4,243	9.82	1,062	9.25	2,798	9.50	4,182	9.40
Federal Government Workers	73	0.53	186	0.60	297	0.69	61	0.53	178	0.60	312	0.70
Self-Emp Workers	1,659	12.10	4,202	13.50	5,858	13.56	1,362	11.87	3,991	13.55	6,144	13.81
Unpaid Family Workers	12	0.09	47	0.15	69	0.16	19	0.17	43	0.15	78	0.18
2010 Est. Civ Employed Pop 16+ by Occupation	13,716		31,130		43,186		11,479		29,463		44,482	
Architect/Engineer	319	2.33	766	2.46	1,038	2.40	238	2.07	710	2.41	1,109	2.49
Arts/Entertain/Sports	592	4.32	1,278	4.11	1,640	3.80	482	4.20	1,224	4.15	1,704	3.83
Building Grounds Maint	807	5.88	1,322	4.25	1,849	4.28	638	5.56	1,350	4.58	1,895	4.26
Business/Financial Ops	416	3.03	1,267	4.07	1,784	4.13	371	3.23	1,213	4.12	1,826	4.11
Community/Soc Svcs	387	2.82	805	2.59	1,067	2.47	316	2.75	779	2.64	1,103	2.48
Computer/Mathematical	498	3.63	1,197	3.85	1,500	3.47	359	3.13	1,102	3.74	1,537	3.46
Construction/Extraction	1,465	10.68	3,360	10.79	4,336	10.04	1,160	10.11	2,930	9.94	4,340	9.76
Edu/Training/Library	171	1.25	291	0.93	387	0.90	155	1.35	274	0.93	391	0.88
Farm/Fish/Forestry	1,320	9.62	2,284	7.34	3,030	7.02	1,203	10.48	2,219	7.53	3,137	7.05
Food Prep/Serving	338	2.46	1,136	3.65	1,700	3.94	314	2.74	1,075	3.65	1,758	3.95
Health Practitioner/Tec	337	2.46	553	1.78	790	1.83	269	2.34	547	1.86	848	1.91
Healthcare Support	199	1.45	498	1.60	801	1.85	130	1.13	496	1.68	845	1.90
Maintenance Repair	165	1.20	454	1.46	587	1.36	126	1.10	426	1.45	572	1.29
Legal	334	2.44	811	2.61	988	2.29	309	2.69	721	2.45	1,006	2.26
Life/Phys/Soc Science	1,213	8.84	3,199	10.28	4,280	9.91	1,072	9.34	3,016	10.24	4,312	9.69
Management	1,242	9.06	3,050	9.80	4,422	10.24	1,016	8.85	2,863	9.72	4,594	10.33
Office/Admin Support	545	3.97	1,074	3.45	1,616	3.74	421	3.67	1,084	3.68	1,656	3.72
Production	134	0.98	452	1.45	759	1.76	104	0.91	456	1.55	779	1.75
Protective Svcs	1,544	11.26	3,622	11.64	5,060	11.72	1,311	11.42	3,415	11.59	5,232	11.76
Sales/Related	648	4.72	1,416	4.55	2,089	4.84	554	4.83	1,273	4.32	2,205	4.96
Personal Care/Svc	337	2.46	749	2.41	1,171	2.71	313	2.73	751	2.55	1,236	2.78
Transportation/Moving												

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Description	Central Zone - Pacific Avenue						Waterfront Zone - Beach Street					
	0.00 - 1.00 miles		0.00 - 2.00 miles		0.00 - 3.00 miles		0.00 - 1.00 miles		0.00 - 2.00 miles		0.00 - 3.00 miles	
	Radius 1	%	Radius 2	%	Radius 3	%	Radius 1	%	Radius 2	%	Radius 3	%
Blue Collar	1,789	13.04	3,865	12.42	5,881	13.62	1,483	12.92	3,868	13.13	6,133	13.79
White Collar	8,512	62.06	20,947	67.29	28,401	65.76	7,073	61.62	19,475	66.10	29,094	65.41
Service and Farm	3,416	24.91	6,318	20.30	8,903	20.62	2,923	25.46	6,120	20.77	9,255	20.81
2010 Est. Workers Age 16+, Transp. To Work	13,361		30,438		42,241		11,214		28,816		43,501	
Drove Alone	7,796	58.35	19,228	63.17	27,308	64.65	6,581	58.69	18,591	64.52	28,179	64.78
Car Pooled	1,334	9.98	2,929	9.62	4,013	9.50	1,132	10.09	2,811	9.75	4,176	9.60
Public Transportation	1,008	7.54	1,821	5.98	2,272	5.38	851	7.59	1,600	5.55	2,272	5.22
Walked	1,177	8.81	2,023	6.65	2,582	6.11	1,010	9.01	1,599	5.55	2,522	5.80
Bicycle	1,275	9.54	2,386	7.84	3,183	7.54	983	8.77	2,335	8.10	3,314	7.62
Other Means	73	0.55	214	0.70	341	0.81	70	0.62	213	0.74	357	0.82
Worked at Home	697	5.22	1,836	6.03	2,542	6.02	588	5.24	1,667	5.78	2,681	6.16
2010 Est. Workers Age 16+ by Travel Time to Work *												
Less than 15 Minutes	4,564		10,606		14,467		3,632		9,967		14,725	
15 - 29 Minutes	4,459		9,877		13,633		3,811		9,345		14,171	
30 - 44 Minutes	1,880		3,805		5,347		1,746		3,640		5,485	
45 - 59 Minutes	805		2,139		3,066		649		2,051		3,150	
60 or more Minutes	1,055		2,438		3,555		877		2,383		3,671	
2010 Est. Avg Travel Time to Work in Minutes	24.71		24.63		25.03		25.10		24.94		25.05	
2010 Est. Tenure of Occupied Housing Units	9,991		22,169		30,454		8,390		21,597		31,542	
Owner Occupied	3,210	32.13	10,078	45.46	14,855	48.78	2,400	28.61	9,626	44.57	15,282	48.45
Renter Occupied	6,781	67.87	12,091	54.54	15,598	51.22	5,990	71.39	11,971	55.43	16,259	51.55
2010 Owner Occ. HUs: Avg. Length of Residence	11		14		15		11		14		14	
2010 Renter Occ. HUs: Avg. Length of Residence	7		7		7		7		7		7	

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Appendix Table 15K: Pop-Facts: Demographic Overview Report
Central Zone and Waterfront Zone

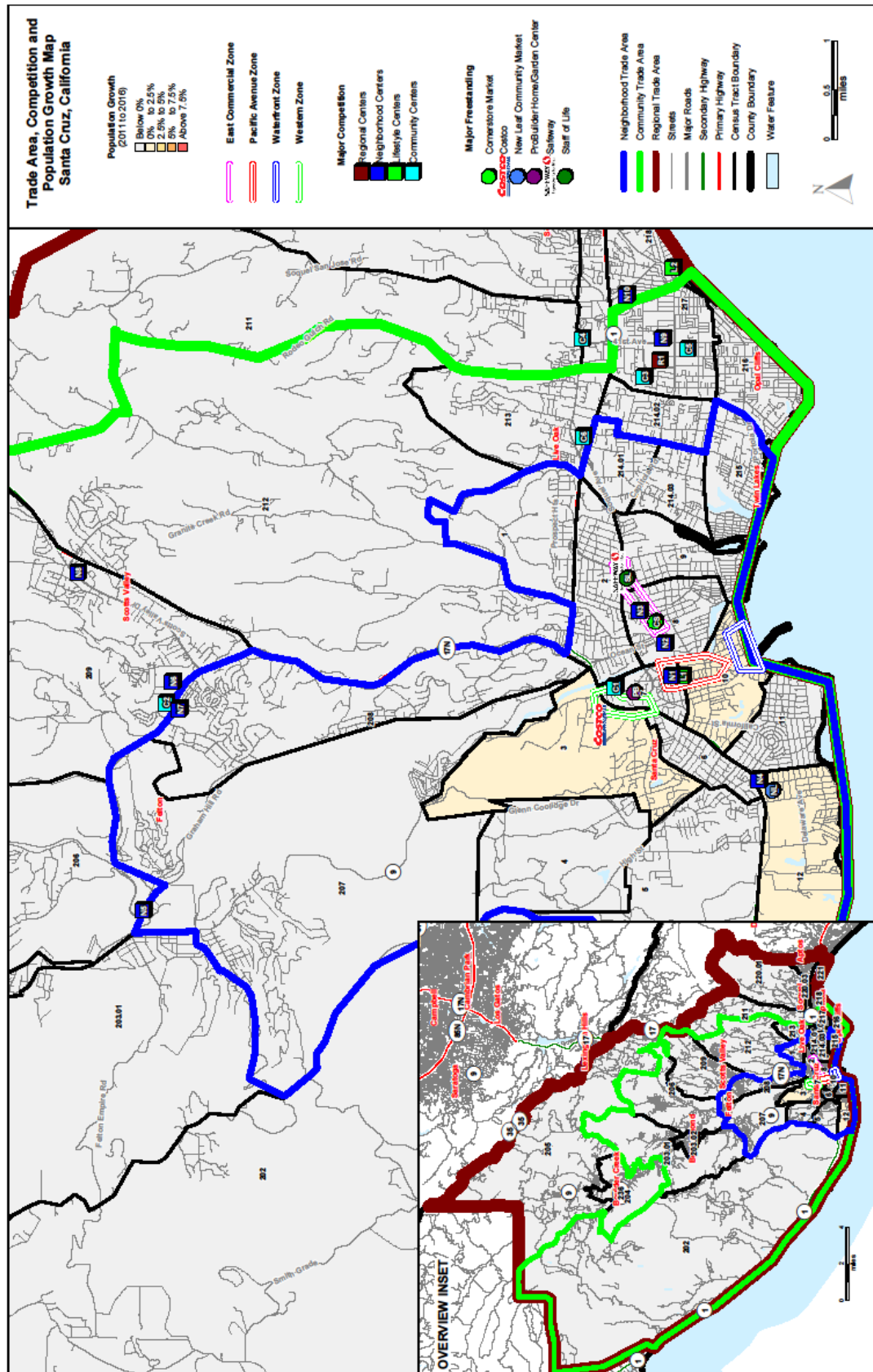
Description	Central Zone - Pacific Avenue						Waterfront Zone - Beach Street					
	0.00 - 1.00 miles	%	Radius 1	0.00 - 2.00 miles	%	Radius 3	0.00 - 1.00 miles	%	Radius 1	0.00 - 2.00 miles	%	Radius 3
Value Less than \$20,000	4	0.12		32	0.32	90	5	0.21		22	0.23	95
Value \$20,000 - \$39,999	24	0.75		41	0.41	96	10	0.42		51	0.53	122
Value \$40,000 - \$59,999	36	1.12		66	0.65	190	17	0.71		80	0.83	258
Value \$60,000 - \$79,999	25	0.78		31	0.31	91	10	0.42		30	0.31	165
Value \$80,000 - \$99,999	33	1.03		51	0.51	132	27	1.13		58	0.60	172
Value \$100,000 - \$149,999	18	0.56		158	1.57	387	22	0.92		190	1.97	457
Value \$150,000 - \$199,999	25	0.78		97	0.96	232	19	0.79		97	1.01	238
Value \$200,000 - \$299,999	174	5.42		464	4.60	859	146	6.08		497	5.16	855
Value \$300,000 - \$399,999	327	10.19		791	7.85	1,119	238	9.92		768	7.98	1,141
Value \$400,000 - \$499,999	548	17.07		1,414	14.03	2,049	415	17.29		1,385	14.39	2,080
Value \$500,000 - \$749,999	1,259	39.22		4,130	40.98	5,742	848	35.33		3,856	40.06	5,816
Value \$750,000 - \$999,999	466	14.52		1,668	16.55	2,311	336	14.00		1,539	15.99	2,329
Value \$1,000,000 or more	272	8.47		1,135	11.26	1,557	306	12.75		1,052	10.93	1,554
2010 Est. Median All Owner-Occupied Housing Value	\$577,778			\$614,651		\$595,029	\$585,689			\$605,976		\$588,469
2010 Est. Housing Units by Units in Structure	10,689			23,895		32,849	9,199			23,381		34,004
1 Unit Attached	827	7.74		2,012	8.42	3,034	705	7.66		1,986	8.49	3,177
1 Unit Detached	4,305	40.28		12,917	54.06	17,845	3,436	37.35		12,370	52.91	18,141
2 Units	681	6.37		1,171	4.90	1,506	609	6.62		1,191	5.09	1,614
3 or 4 Units	1,269	11.87		2,082	8.71	2,627	1,117	12.14		2,017	8.63	2,742
5 to 19 Units	2,126	19.89		3,108	13.01	3,689	1,946	21.15		2,952	12.63	3,751
20 to 49 Units	769	7.19		1,175	4.92	1,473	719	7.82		1,245	5.32	1,502
50 or More Units	569	5.32		975	4.08	1,334	587	6.38		1,052	4.50	1,327
Mobile Home or Trailer	143	1.34		433	1.81	1,309	81	0.88		552	2.36	1,722
Boat, RV, Van, etc.	0	0.00		21	0.09	32	0	0.00		15	0.06	28
2010 Est. Housing Units by Year Structure Built	10,689			23,895		32,849	9,199			23,381		34,004
Housing Unit Built 2000 or later	1,025	9.59		1,843	7.71	2,278	799	8.69		1,725	7.38	2,279
Housing Unit Built 1990 to 1999	863	8.07		1,785	7.47	2,441	814	8.85		1,686	7.21	2,540
Housing Unit Built 1980 to 1989	720	6.74		2,335	9.77	3,882	624	6.78		2,205	9.43	3,967
Housing Unit Built 1970 to 1979	1,765	16.51		4,409	18.45	6,489	1,494	16.24		4,291	18.35	6,665
Housing Unit Built 1960 to 1969	1,093	10.23		3,082	12.90	4,633	1,140	12.39		3,022	12.93	4,953
Housing Unit Built 1950 to 1959	1,269	11.87		3,150	13.18	4,399	1,025	11.14		3,165	13.54	4,694
Housing Unit Built 1940 to 1949	1,096	10.25		2,244	9.39	2,893	884	9.61		2,274	9.73	3,001
Housing Unit Built 1939 or Earlier	2,858	26.74		5,047	21.12	5,835	2,419	26.30		5,014	21.44	5,905
2010 Est. Median Year Structure Built **	1961			1965		1967	1962			1964		1967

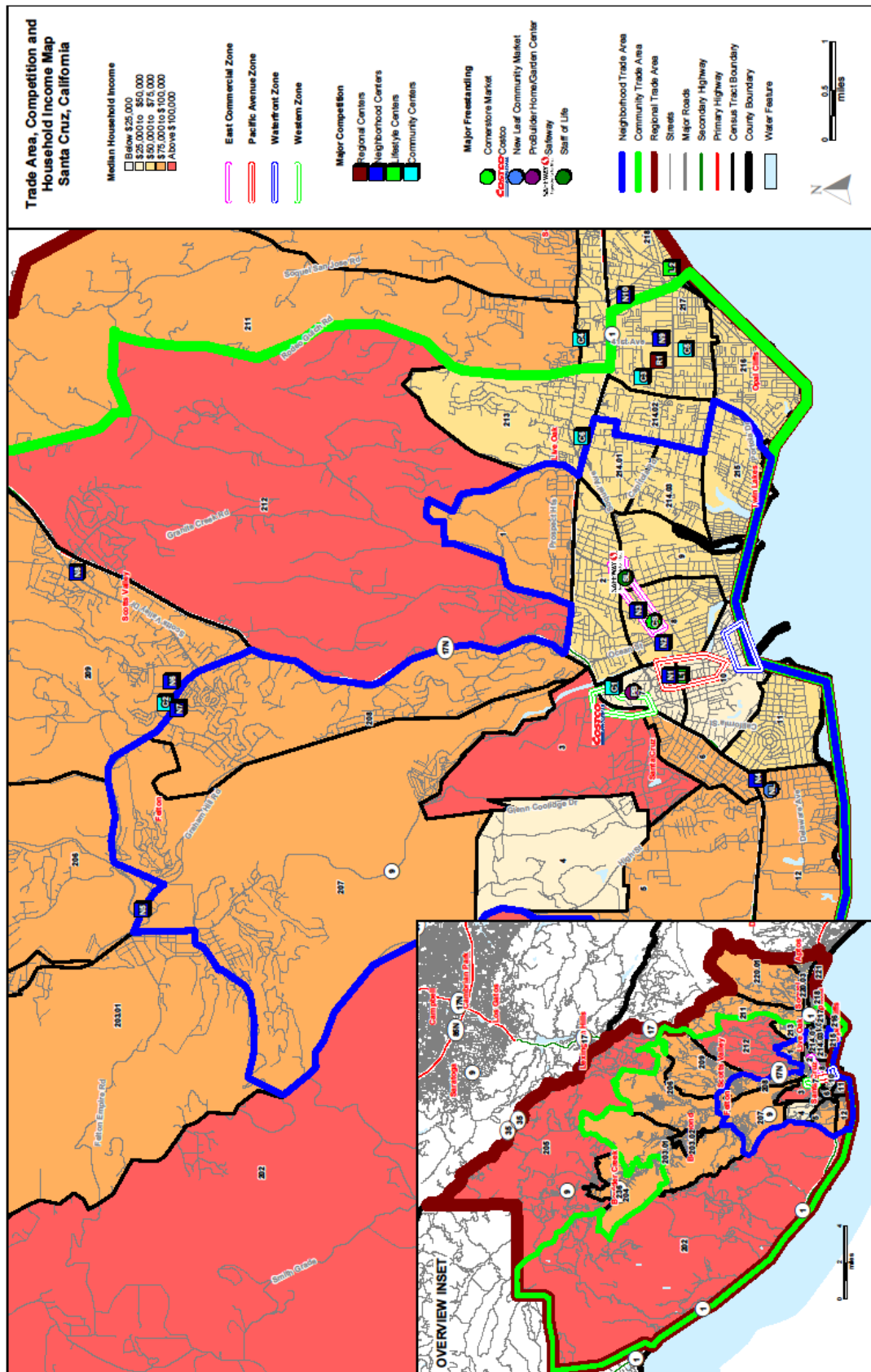
*This row intentionally left blank. No total category data is available.

**1939 will appear when at least half of the Housing Units in this reports area were built in 1939 or earlier.

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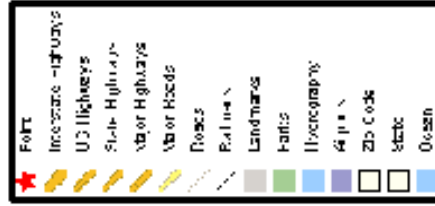
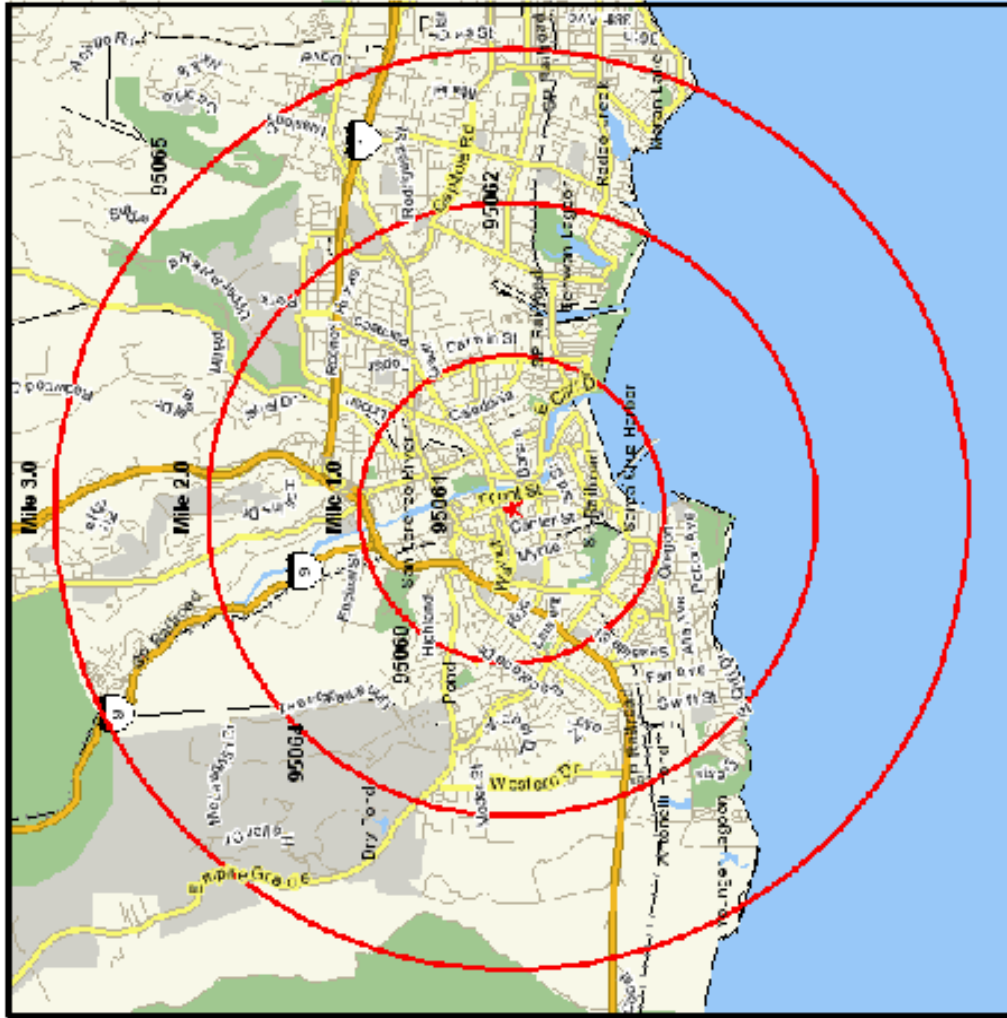


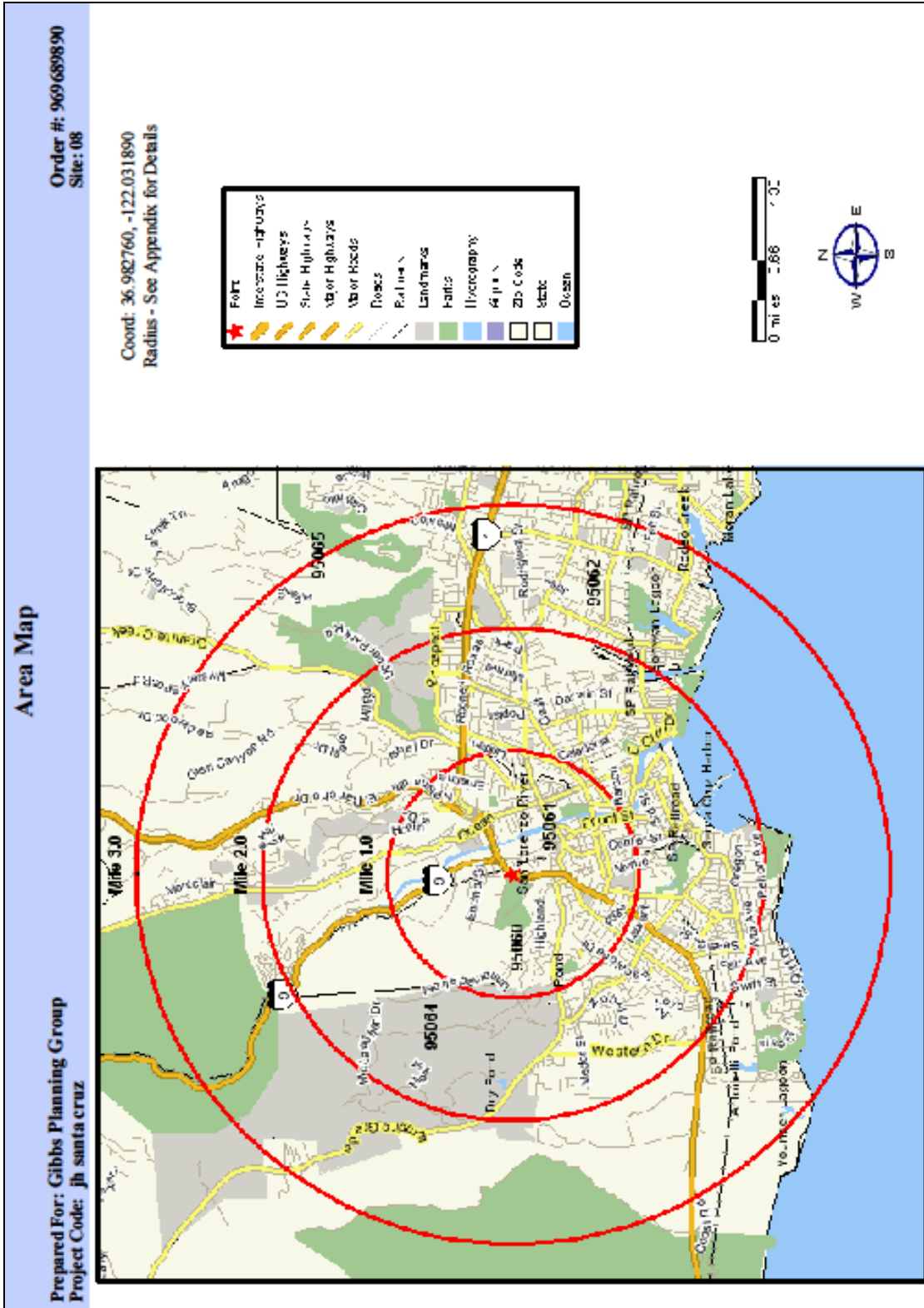
Area Map

Prepared For: Gibbs Planning Group
Project Code: jh santa cruz

Order #: 969689890
Site: 04

PACIFIC AVE AT CATHART ST
SANTA CRUZ, CA 95060
Coord: 36.971680, -122.025483
Radius - See Appendix for Details





Area Map

Prepared For: Gibbs Planning Group
Project Code: jh santa cruz

Order #: 969689890
Site: 06

SOQUEL AVE AT SEABRIGHT AVE
SANTA CRUZ, CA 95062
Coord: 36.979828, -122.010499
Radius - See Appendix for Details

