



San Marcos

CREEK SPECIFIC PLAN

Retail Market
Analysis

June 2017



RETAIL MARKET ANALYSIS

San Marcos Creek Specific Plan
(JN 159077)

June 2017

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CHAPTER 1.0 EXECUTIVE SUMMARY

This Retail Market Analysis provides a general overview of the San Marcos Creek Specific Plan Trade Area (herein referred to as the Creek SP Trade Area) located within the City of San Marcos based upon existing conditions as well as through projections for future development scenarios. In order to better understand the health and potential of the Creek SP Trade Area, the Trade Area for the City of San Marcos (hereinafter referred to as the City Trade Area) was also analyzed. The study will help to understand the demand for additional retail establishments, both existing demand and projected future demand, and provide recommendations for consideration specific to potential changes to the San Marcos Creek Specific Plan. While this Executive Summary contains an overall abstract of the study, it is important to read the entire study to understand the findings and conclusions in the context of overall Creek SP Trade Area performance, limitations, and opportunities. A full list of data sources, methodology, and terms utilized in this report are found in *Section 2.0, Methodology* and *Section 9.0, Appendices*.

RETAIL TRADE AREAS

The Creek SP Trade Area and City Trade Area are the geographic areas from which retail establishments within the San Marcos Creek Specific Plan area, and City of San Marcos, respectively, draw most of their customers. The extents and methodology used to delineate the Creek SP Trade Area and City Trade Area can be found in *Section 3.0, Retail Trade Area Delineation*.

The Creek SP Trade Area was established by:

- Identification and classification of existing retail establishments and shopping centers within and around the Specific Plan area;
- Overall drive distance of two miles (five minute drive time) and geographic barriers based upon the existing road network based upon a general mix of locally serving retail.

The San Marcos Trade Area was established by:

- Identification and classification of existing retail establishments and shopping centers within the City of San Marcos;
- A gravitational analysis to determine consumer selection for traveling between competition shopping centers and cities; and
- Overall drive distance of 7 miles (15 minutes) and geographic barriers based upon the existing road network based upon a general mix of community and regionally serving retail.

Findings:

- The highest level hierarchy of shopping centers within the City are classified as community shopping centers with an average drive time of 5 to 10 minutes. At the same time the concentration of these centers could create a more agglomerative effect.
- An inventory of the Creek SP Trade Area found mostly locally serving retail with some exceptions including furniture and electronics retailers. A 2 mile trade area (3-6 minute drive time) was utilized to define the trade area which accounted for competing neighborhood and community shopping centers.





RETAIL TRADE AREA RESIDENTS/CONSUMERS

Demographic data is used to understand the typical consumer mix of the Creek SP Trade Area and the City Trade Area. This information helps estimate the potential spending patterns and purchasing power of consumers who reside within each trade area. In addition, market segmentation data that matches consumer demographics with consumer spending and lifestyle behaviors was also analyzed for each trade area. A full analysis of demographics and findings can be found in *Section 4.0, Key Demographics*. The demographic data assessed included:

- **Growth:** The Creek SP Trade Area is expected to grow at an annual rate of 1.2 percent, which is slightly less than the City’s projected annual growth rate of 1.5 percent, but on par with North County growth. Growth projections are based upon existing conditions and past growth. New development within the San Marcos Creek Specific Plan can result in changes to the trade area’s growth projections.
- **Households and Income:** The Creek SP Trade Area has an estimated 2.8 persons per household, which is 7.8 percent higher than the U.S. average of 2.6 persons per household but is smaller than the average household size of the City of San Marcos and City Trade Area of 3.1 and 3.0 respectively. The Creek SP Trade Area has an estimated median household income that is 14.2 percent lower than the U.S. average and 20.7 percent lower than that of the City of San Marcos. The smaller household size and lower estimated household income indicates lower overall purchasing power for residents within the Creek SP Trade Area than the City or City Trade Area population.
- **Housing Tenure:** The percent of owner-occupied housing within the Creek SP Trade Area (53.2 percent) is lower than the U.S. average of 55.4 percent. Renter occupied housing within the Creek SP Trade Area (40.8 percent) is significantly higher than the U.S. average of 32.9 percent, but comparable with the larger City Trade Area (41.4 percent). Recent demographic shifts, housing market volatility, changes in mobility and job tenure have created higher demand for rental units at all levels of income. This is especially noticeable in California with a 5.8 percent higher concentration of rental units than the national average of 34.9 percent.
- **Educational Attainment:** Residents of the Creek SP Trade Area have overall educational attainment rates lower than that of the City of San Marcos, City Trade Area and U.S. Average. Approximately 25 percent of residents within the Creek SP Trade Area have a Bachelor’s Degree or higher compared to 31.6 percent for the City of San Marcos, 28.4 percent for the City Trade Area and 30.4 percent for the U.S.
- **Age:** The total estimated median age of the Creek SP Trade Area is 37 years, which is slightly lower than North County and U.S. averages of 38 years but higher than the City of San Marcos and City Trade Area of 34.2 and 34.6 years respectively. When examining major consumer age groups, the Creek SP Trade Area has a higher proportion of residents aged 65+ than the City Trade Area and U.S. averages. The Creek SP Trade Area has a higher population of 14 and younger than the U.S. average.
- **Employment and Occupations:** Compared to the U.S., residents within the Creek SP Trade Area were employed across industries in the same proportion as the country as a whole. When examining occupations, the Creek SP Trade Area has a higher concentration of workers in service jobs than the City Trade Area or U.S. average.
- **Market Segmentation:** When examining ESRI’s Tapestry Market Segmentation data (*see Section 5.0 Market Segmentation*), the Creek SP Trade Area, while having a diversity of market segments, as a whole,





has a higher concentration of residents in market segments with lower overall economic affluence than the City Trade Area.

- **Market Segmentation:** The City Trade Area contains a more diverse group of market segments than the Creek SP Trade Area. This is important as this is a future consumer/customer base for future housing and retail opportunities within the Creek Specific Plan area. Segments such as Boomburbs, Savvy Suburbanites, and Home Improvements have high rates of eating out, which could support additional restaurant establishments in the area. Market segments such as Bright Young Professionals and Old and Newcomers are more supportive of market-rate multi-unit dwellings which are proposed for the San Marcos Creek Specific Plan area.

CONSUMER DEMAND

- Creek SP Trade Area consumers generate an estimated \$347 million in annual consumer spending on retail goods and services.
- Consumers within the overall San Marcos City Trade Area generate an estimated \$3.65 billion in consumer expenditures.
- The Creek SP Trade Area constitutes approximately 9.5 percent of the overall City Trade Area consumer expenditures.
- In examining the top three quartiles of expenditures, over 16.5 percent of consumer spending by retail store type is at Automotive Dealers (NAICS 441100). This includes the purchase of new or used automobiles and services. Approximately 13.0 percent of consumer spending within the Creek SP Trade Area, over \$45.1 million annually, is spent in Grocery Stores (NAICS 445110) and 10.1 percent, \$35.2 million annually, is spent in Department Stores (NAICS 4521) . Restaurants/Other Eating Places (NAICS 7225) generates almost \$31.4 million annually which is 9.0 percent of annual expenditures.

RETAIL SUPPLY

- Overall estimated sales within the Creek SP Trade Area are \$589.5 million annually.
- Restaurants/Other Eating Places generate over \$86 million in retail sales within the Creek SP Trade Area. This is followed by Electronics & Appliance Stores (\$85.3 million), Grocery Stores (\$68.5 million), Building Material & Supplies Dealers (\$60.0 million) and Furniture Stores (\$50.9 million). These store types are also key components of the retail mix of the Creek SP Trade Area that includes Restaurant Row, Furniture Row, and major electronics/appliance establishments including Fry's and Best Buy.

CITY OF SAN MARCOS RETAIL PERFORMANCE

- Overall retail sales within the City of San Marcos account for 36.1 percent of the City Trade Area's sales (automobile sales excluded), yet account for almost 59 percent of all retail establishments within the City Trade Area. This lower percentage of sales capture could indicate weakness or underperformance in some establishments.
- The 2015 London Group report indicated a retail vacancy rate of 10.3 percent. Healthy retail markets typically have vacancy rates below 7 percent. Recent CoStar real estate data from first-quarter 2017 reports that the vacancy rate in the San Marcos market is now 16.5 percent.





CREEK SP TRADE AREA PERFORMANCE

- The Creek SP Trade Area generates an overall surplus of \$242.3 million in sales which indicates it attracts a significant number of consumers from outside of the trade area. The locations of Restaurant Row, Furniture Row, and anchors such as Best Buy and Fry's contribute to this surplus.
- Store types that are strong performers and attracting consumers from outside of the Creek SP Trade Area include Furniture Stores, Home Furnishing Stores, Electronics & Appliance Stores, Other Miscellaneous Store Retailers, Florists, Sporting Goods/Hobby/Musical Instrument Stores, Restaurants/Other Eating Places and Beer/Wine/Liquor stores. Agglomerative economics indicate that the area could continue to grow these store types and capture more retail sales from competing retail trade areas.
- Several store types still result in a leakage of over \$56.2 million in potential lost sales in which residents of the Creek SP Trade Area are spending outside of the trade area. This shows potential unmet demand. These store types include Shoe Stores, Automobile Dealers, Other General Merchandise Stores, Clothing Stores, Department Stores, Jewelry/Luggage/Leather Goods Stores, Books/Periodicals/Music Stores, Drinking Places, and Specialty Food Stores.

RETAIL EXPANSION OPPORTUNITIES AND RETAIL ATTRACTION STRATEGY RECOMMENDATIONS

- A leakage of \$56.2 million could result in an additional demand of almost 117,000 square feet of additional retail space. It is important to note that:
 - 100 percent retail capture is usually not possible for most retail trade areas with a similar retail mix to the Creek SP Trade Area. Furthermore, projects on the periphery and adjacent to the trade area boundaries may expand their retail pull which could further reduce the size of the Creek SP Trade Area and existing market share.
 - The amount of land available for new retail development is limited. Some development would require reconfiguration of currently developed land which would require initiation by landowners and the private sector. While this does occur, this is typically a long-term strategy. The loss of Redevelopment in 2011 makes it more difficult for the City to be a direct partner in these efforts.
- The San Marcos Creek Specific Plan calls for the development of additional residential and retail development. Based upon potential residential dwelling unit development scenarios, the population and retail demand is expected to increase once built-out and occupied as the overall population of the Creek SP Trade Area will have increased.
 - **2,300 Dwelling Units Developed** – This scenario would result in total demand of an additional 200,000 to 221,000 square feet of additional retail demand within the Creek SP Trade Area.
 - **3,600 Dwelling Units Developed** – This scenario would result in an additional 276,000 to 401,000 square feet of additional retail demand within the Creek SP Trade Area.





RECOMMENDATIONS

The following recommendations should be considered while updating the San Marcos Creek Specific Plan. These recommendations are not all policies that could be adopted through the update process, but include programs and strategies that organizations can also implement in partnership with the City.

1. **Diverse Consumer Base.** Diversification of market segments in the existing Creek SP Trade Area will be important in overall retail attraction. Attracting households with higher disposable incomes and variations in consumer preferences can result in a more diverse mix of retail opportunities.
2. **Take Advantage of Strengths and Plug Leakages.** Taking advantage of existing agglomeration economies will potentially increase the overall market capture of the Creek SP Trade Area and bring in more outside consumers to the trade area. This includes a focus on retail strengths such as Restaurants, Home Furnishings, and Sporting Goods/Hobby/Musical Instrument Stores, which have positive industry economic outlooks and establishment sizes that would be compatible with the vision for the San Marcos Creek Specific Plan. Current leakages also provide an opportunity to capture retail sales that are currently being made outside of the Creek SP Trade Area. These opportunities, when considering overall industry economic outlook, include Clothing Stores, Jewelry/Luggage/Leather Goods Stores, and Specialty Food Stores. Cycles and shifts in consumer preference will continue to drive a re-shaping of the retail industry. As the San Marcos Creek Specific Plan area develops overtime, consumer preferences for store types will continue to change and therefore a focus on the overall retail mix and not individual tenant store-types is important. Consumers are now placing more emphasis on the overall consumer experience which includes mixing entertainment and dining with retail shopping opportunities.
3. **Retail Attraction Strategy.** Creation of a comprehensive retail attraction campaign could aid retail recruitment efforts. The strengths of the existing Creek SP Trade Area and City Trade Area demographics can be marketed to show the Creek SP Trade Area will be positioned to support additional sales and establishments. The campaign can also include customized strategies for store types the City wishes to target to ensure the materials provide information important to site selection decisions of individual retailers. Attraction efforts should be focused on retail store types that show the greatest opportunities for expansion. In addition, oftentimes developers now plan an active role in recruiting local and unique retailers. Working with developers through the process will help develop a viable and successful retail mix.
4. **Engage Property Owners.** The San Marcos Creek Specific Plan area is highly parcelized, meaning land has been divided into smaller parcels owned by multiple owners. This makes development more complicated and costly and may serve as a barrier to implementation of the plan. The City should begin active dialogue with property owners to educate them on the vision of the San Marcos Creek Specific Plan, potential future benefits, and how to potentially become partners and benefit in future development.
5. **Solve Parcelization Through Partnership.** Solving parcelization and creating viable development areas could include the use of legal partnerships with local landowners. Local landowners could receive a share of a development agreement based upon their land ownership and thus receive a potential return on investment outside of an outright purchase at the beginning of a development project. This would present an equitable and lower risk option for property owners and lower capitalization costs on the outset for developers.
6. **Maximum Land Use Flexibility.** San Marcos Creek Specific Plan land use and zoning standards should provide for maximum flexibility of uses to account for the fact that requiring ground floor retail





will force where developers to build more retail space than the market could potentially absorb. This would result in high vacancy rates and higher development costs. Options such as horizontal mixed-use, providing for flex space (residential first floor that could be converted to retail when the market demands), and live-work units can provide more flexibility and improve rates of return.

7. **Right-Size Parking.** Analyze the parking requirements of the San Marcos Creek Specific Plan to ensure retail parking requirements do not result in an “over-park” situation where more on-site parking is required than necessary which will significantly increase development costs. Maximizing on-street parking, shared parking, and standards that take into account reduced vehicle trips from pedestrian and bicycle travel should be utilized in developing these standards. Establishing a parking district could help aid the construction and maintenance of shared structured parking to alleviate potential supply issues.
8. **Businesses Must Be Visible.** Ensure that the location of retail space is highly visible to the automobile. Although one of the principles of the San Marcos Creek Specific Plan is to provide for a walkable neighborhood, visibility from vehicles is still a primary driver in retail location decisions and overall success of retail spaces. San Marcos Boulevard provides the most visibility for retail. For retail to penetrate deeper into the specific plan area, the attraction of a destination retailer to serve as an anchor is required to increase overall vehicle trips along the street that smaller retailers would be situated.
9. **Right-Size Retail.** The current San Marcos Creek Specific Plan requires more retail space than could be absorbed by the local market now and well into the future. The amount of retail should be reduced to account for existing and future demand based upon the actual number of additional households that will be added as a result of the specific plan implementation/development.
10. **Density Drives Development.** Density of residential development within the San Marcos Creek Specific Plan will drive the overall amount of retail space that could potentially be supported by the market. Higher density will result in more households, which will drive additional demand, and thus additional demand for square footage of retail space. Higher density will also result in increased use of modes of transportation outside of the automobile including walking and cycling. The higher the density, the more likely retail could be supported in areas of the development that may not receive as high of vehicle ADT as typically necessary to support retail due to a higher amount of cycling/pedestrian traffic along those same road segments.
11. **Explore Creative Financing.** Explore public-private partnership programs to assist small business such as the establishment of Business Improvement Districts and/or Enhanced Infrastructure Financing District to allow for revenue sharing and re-investment in existing retail areas to finance infrastructure improvements, parking, beautification and marketing programs. Explore the functions of a small business liaison to assist retail businesses to provide permit and regulatory compliance assistance and coordinate with the State and Federal Government for loan and grant programs including SBA loans, New Market Tax Credits and Infrastructure Bank loans. The liaison can be a City position, but can also be provided by partner organizations such as the Chamber of Commerce.
12. **Be a Piece of the Larger Growth Puzzle.** The San Marcos Specific Plan area must recognize it is part of a larger City development strategy that includes growth in the University District and the Retail Focus Area north of San Marcos Boulevard. Ensuring complementary growth will avoid direct competition and cannibalization of each trade areas market share which is a zero-sum game for the City as a whole. Synergies already exist with agglomerative retail such as Restaurant Row to grow retail connections between the Retail Focus Area and the San Marcos Creek Specific Plan. Furthermore, potential weaknesses in current establishments/shopping centers within the City, shown by lower sales





and higher vacancy rates, should be addressed. This could include upgrading and updating facades and existing strip retail facilities, developing more outlots from existing parking areas, or allowing for potential changes in land use to reflect changing spatial demands for retail. Considering development North of San Marcos Boulevard, in addition to the original Specific Plan area, could allow for a larger area for development, take advantage of existing anchors such as the movie theatre and restaurant row, and decrease immediate parcelization and flood plain issues that presently limit developable area within the Specific Plan area south of San Marcos Boulevard.

- 13. Explore Unique and Niche Development as Attractors.** Attracting a major destination retailer or unique development (i.e. Anaheim Packing House) could create an entirely different retail demand that will expand the overall market area and drive more consumers to the San Marcos Creek Specific Plan area. It is important to understand that most jurisdictions are also looking for these same “game changers” and competition is fierce for these retail anchors. As with previous recommendations, the specific plan should allow for maximum flexibility to account for this potential land use amongst other development scenarios. This area can also build upon the concentration of restaurants in the area known as “Restaurant Row” which creates an entertainment aspect to shopping which is becoming a key attractor for consumers.





CHAPTER 2.0 METHODOLOGY

HOW THIS STUDY SHOULD BE UTILIZED

This Retail Market Analysis provides a general overview of the San Marcos Creek Specific Plan Trade Area (herein referred to as the Creek SP Trade Area) located within the City of San Marcos based upon existing conditions as well as through projections for future development scenarios. In order to better understand the health and potential of the Creek SP Trade Area, the Trade Area for the City of San Marcos (hereinafter referred to as the City Trade Area) was also analyzed. The study will help to understand the demand for additional retail establishments, both existing demand and projected future demand, and provide recommendations for consideration specific to potential changes to the San Marcos Creek Specific Plan.

Information provided by this report can:

- Provide an understanding of the strengths and weaknesses of the existing local retail sector, including the size of the Creek SP Trade Area market, local spending power, and barriers to growth, and determine whether local consumers' retail demand is met;
- Compare and contrast the strengths and weaknesses of the Creek SP Trade area with that of the overall City Trade Area to better understand geographical differences in demand and supply, as well as to provide an overall basis for assumptions for future development opportunities presented by the San Marcos Creek Specific Plan;
- Estimate the amount of additional establishments and retail space that could be supported within the Creek SP Trade Area based upon current leakages (consumer expenditures made at retail establishments outside of the trade area) and projections for future retail demand based upon development scenarios for the San Marcos Creek Specific Plan;
- Better define, by identifying unmet consumer demand, potential target retail store types that could be attracted to the community either through new development, infill or existing vacancies;
- Determine and hone market recruitment targets to better utilize existing economic development resources by better understanding which additional retail store types could be supported by current and future demand within the Creek SP Trade Area;
- Provide a better understanding of the current consumer-base to better inform economic development policy; and
- Inform potential changes to land use policies based upon potential existing and future market demand.

LIMITS OF THE STUDY

This study is **not** intended to provide:

- Detailed site level analysis for the location of specific store brands (i.e. Can “The Gap” be supported within the trade area. The report will provide information as to whether “Clothing Stores” could be supported);
- Evaluation of the performance of existing individual shopping centers and retail establishments;





- An overall prediction of the fiscal impacts of additional retail development; and/or
- An exact accounting of retail sales and expenditures for the retail trade areas. The data utilized for this study are estimates based upon taxable sales, point-of-sale data, population demographics, and U.S. Census Bureau economic data.

ASSUMPTIONS

This study utilizes third party proprietary data resources (refer to Data Sources, below) to draw conclusions regarding the performance of the Creek SP Trade Area and City Trade Area. These data sources take into account different factors, including data collection methods, baseline data sources, and other information that can vary from source to source. A detailed list of assumptions is provided in *Appendix A*. A detailed list of each data source is provided in *Appendix B*.

DEFINITIONS

The following terms are commonly used in this retail market analysis and are referenced throughout this document:

- Average Sales per Square Foot – A national average of typical gross sales per square foot unit of a retail establishment. Average sales could fluctuate based on the specific retail business model and the local market.
- Average Store Size of Retail Establishment – A national average of the typical size in square feet of retail establishments by retail store type. The average size could fluctuate based on the specific retail business model, the company, and the local market. In many of the retail types, there is a large variation in store sizes. A number of factors go into determining a retail store's overall size, and individual retail operators will likely have an average store size that may differ from national averages.
- Capture – The amount of consumer expenditures that can be attributed to retail sales within a retail trade area.
- Consumer Expenditures – The amount of estimated expenses incurred in consumption by consumers in a retail trade area.
- Consumer Price Index (CPI) – An index of the variation in prices paid by typical consumers for retail goods and other items. CPI is used to measure inflation and normalize time series data.
- Cost of Living Adjustment (COLA) – A cost of living adjustment is an adjusted income figure that takes into account necessary expenses such as taxes and housing-related costs.
- Gap Leakage – Retail demand in a retail trade area exceeds retail sales in a retail trade area. Leakage is normally due to local demand not being satisfied and local resident consumers shopping outside of a retail trade area.
- Gap Surplus – Retail sales in a retail trade area exceeds retail demand in a retail trade area. This surplus is normally due to consumers from outside of a retail trade area making purchases at establishments within a retail trade area. This indicates that a retail trade area is attracting a larger customer base than local resident consumers.





- Market Cannibalization – The negative impact that a new establishment has on a retail trade areas share of sales of its existing establishments.
- Retail Demand – Indicates the demand by consumers for a retail store type based on the consumer expenditures (dollars spent) at those retail store types.
- Retail Gap Coefficient – The relative measure of retail sales compared to local demand. While not a hard and fast rule, generally a coefficient of 0.80–1.20 indicates market equilibrium (balance between supply and demand) and that sales are generally satisfying local demand. A coefficient greater than 1.20 indicates a gap surplus which indicates a store type is attracting consumers from outside of the trade area. A coefficient less than 0.80 indicates a gap leakage, indicating there is unmet demand within the trade area and/or consumers are choosing to shop outside of the trade area at specific store types.
- Retail Sales – The amount of estimated sales by retail store type in a retail trade area.
- Retail Sales per Square Foot – The amount of overall sales for an establishment divided by the square footage. This is used to calculate potential additional retail space.
- Retail Store Type – A segmented classification of retail stores such as department stores, home and garden stores, music stores, etc. These store classifications are based on the North American Industry Classification System (NAICS).
- Retail Supply – Indicates the supply of products available for purchase by consumers for a retail type measured by retail sales at those retail store types.
- Retail Trade Area – The geographic area from which retailers generate approximately 75 percent of their customers. Retail trade areas of individual establishments may vary based upon store type and merchandise lines. The Creek SP Trade Area and City Trade Area were calculated based upon current retail mix, approximate location of competing retail areas, and driving distances based upon the existing road network.





CHAPTER 3.0 RETAIL TRADE AREA DELINEATION

EXPLANATION OF THE CITY TRADE AREA

The City Trade Area is the geographic area from which retail establishments within the City of San Marcos generally draw most of their customer base. It is defined by the retail attraction ability and locations of the existing retail mix within the City of San Marcos, the proximity to competing commercial shopping areas in surrounding areas, and geographic barriers such as a lack of adequate roads to reach the establishments. The trade area includes the City of San Marcos, as well as limited areas of Vista, Escondido, Carlsbad, Valley Center and unincorporated San Diego County; refer to Figure 1.

Industry standards classify retail commercial centers based upon the retail type mix, size, and the retailers present. The hierarchy of standard classifications are:

- Regional Center/Mall: Generally contains a full-line or junior department store, mass merchant, discount department store and/or a fashion apparel store. Regional shopping centers typically have a 15 to 30 minute drive time and/or a 10 to 15 mile trade area.
- Community Shopping Center: Generally contains a discount store, or large-specialty discount store (such as toys, books, electronics, home improvement/furnishings, or sporting goods). Community shopping centers typically have a 5 to 10 minute drive time and/or a 3 to 5 mile trade area.
- Neighborhood Shopping Center: Generally contain a supermarket or drug store and a variety of smaller retail stores. Neighborhood shopping centers typically have a 3-6 minute drive time and/or a 1 to 2 mile trade area.

The highest level hierarchy of shopping centers within the City are classified as community shopping centers with an average drive time of 5 to 10 minutes. The agglomeration and concentration of these centers does create a more regional effect. Combined with analysis utilizing a retail gravitational model and retail mix, the study utilized a 7 mile (15 minute) drive time. The analysis then applied further modeling.

Further modeling included analyzing and incorporating a drive-time analysis, a retail gravitation model, input from existing retail business owners, and the knowledge and expertise of City planning staff, as described below:

- A retail gravitation model analyzes the likelihood that an individual shopper will choose location A over location B when deciding where to shop. The model takes into account distance traveled and the overall size of competitors. The premise of the model is that consumers will generally be willing to travel further to higher population centers than lower population centers. This analysis utilized average drive time instead of distance due to higher levels of traffic congestion which should be factored into travel within the area. The analysis identified competing shopping centers, located outside of the City of San Marcos. The gravity model indicated a smaller trade area than a full regional shopping area due to the proximity of competing retail centers. Based upon this analysis, the overall trade area was confirmed to be approximately 7 miles (15 minute drive time).
- A drive time map was created utilizing ESRI GIS and information on the local roadway network that included speeds, traffic counts and average congestion. A map of actual drive time was produced and modified based upon the gravitation model.
- The preliminary trade area boundary was reviewed by City staff to verify the accuracy of the information and delineation.





EXPLANATION OF THE CREEK SP TRADE AREA

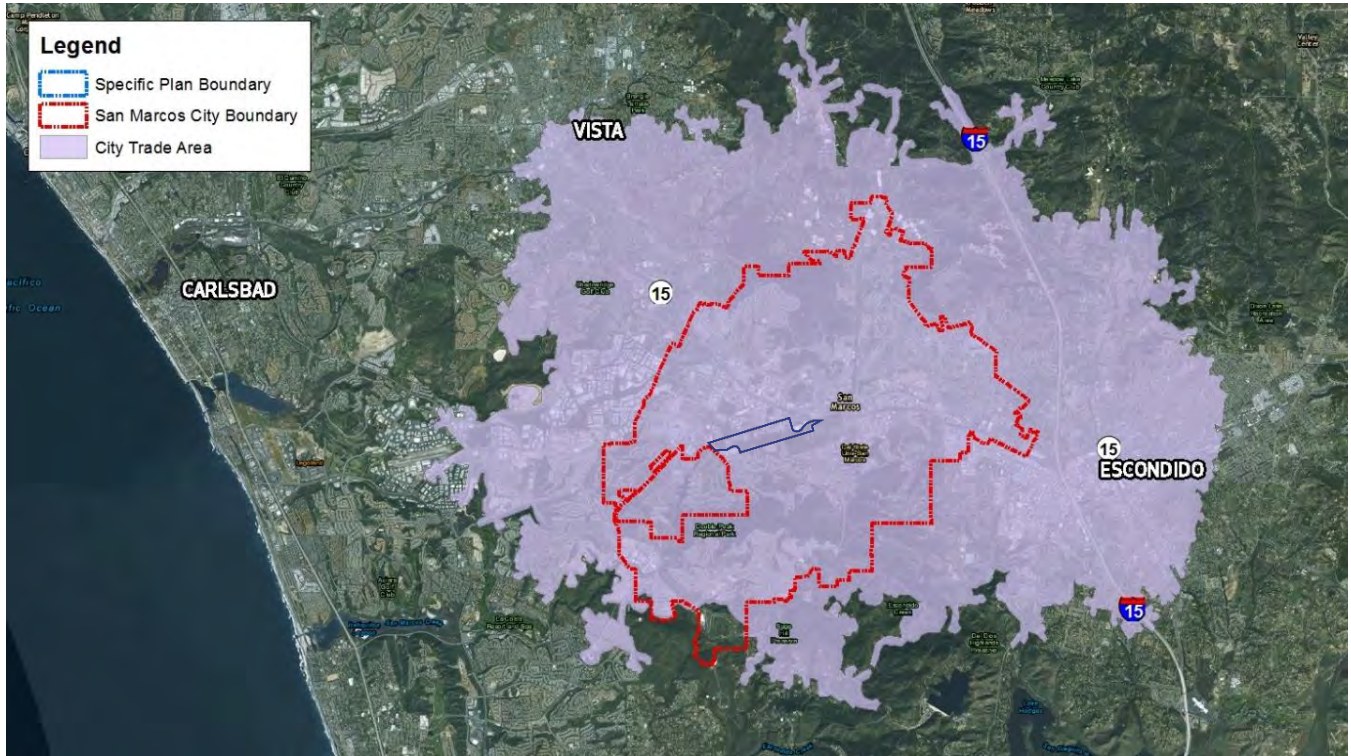
The Creek SP Trade Area is the geographic area from which retail establishments within the San Marcos Creek Specific Plan boundary generally draw most of their customer base. It is defined by the retail attraction ability and locations of the existing retail mix within the Specific Plan boundary, the proximity to competing commercial shopping areas in the surrounding area, and geographic barriers such as San Marcos Creek. This trade area includes the San Marcos Creek Specific Plan area and the West Central portion of the City; refer to Figure 2.

An inventory of the trade area found mostly locally serving retail with some exceptions including furniture and electronics retailers. A 2 mile trade area (3-6 minute drive time) was utilized to define the trade area which accounted for competing neighborhood and community shopping centers. The preliminary trade area boundary was reviewed by City staff to verify the accuracy of the information and delineation.





Figure 1
San Marcos Trade Area

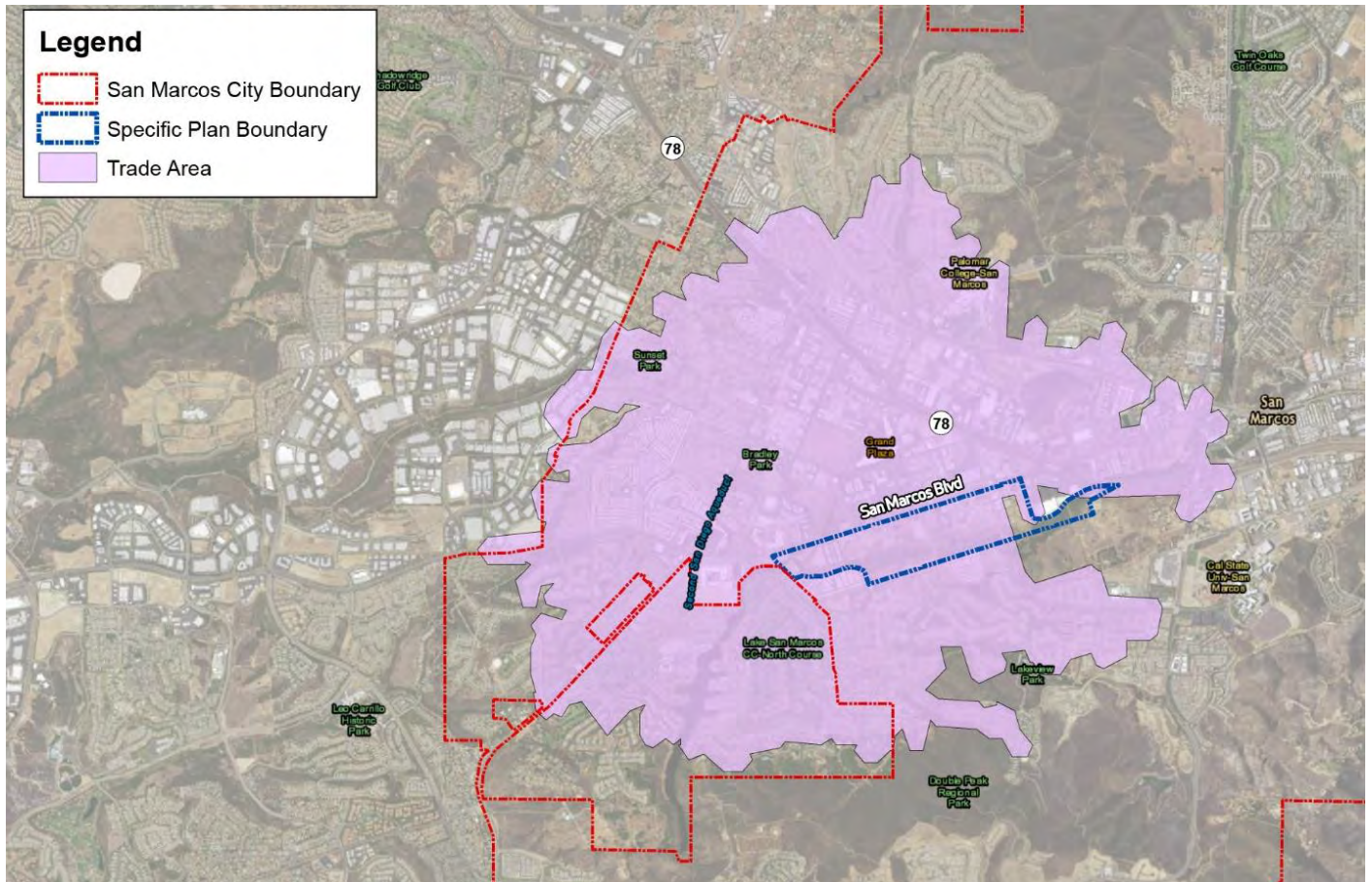


Source: Michael Baker International; ESRI





Figure 2
Creek SP Trade Area



Source: Michael Baker International; ESRI





CREEK SP TRADE AREA RETAIL INVENTORY

Understanding the current retail inventory of the Creek SP Trade Area is useful to better understand existing consumer attractors, shopping center locations, and anchor stores who serve to attract a majority of customers to the trade area.

Regional shopping centers offer a larger supply of goods, more variety, and often additional attractors, all of which are factors that consumers take into account when considering where to shop. Regional shopping centers usually include major anchors (major department stores) and higher-end merchandise retail stores. There are no regional shopping centers within the Creek SP Trade Area.

Community shopping centers are typically smaller in size, have one or more junior anchors (discount department store, grocery store, warehouse store, etc.) Consumers will not drive as long of distances to shop at community shopping centers as compared to regional shopping centers. There are three community shopping centers within the Creek SP Trade Area. These are:

- Grand Plaza – anchored by Nordstrom Rack, Marshalls and Ross
- Creekside Market Place – anchored by Best Buy and Hobby Lobby
- Restaurant Row – anchored by Edwards San Marcos 18 Cinema

In addition, standalone establishments that also have a similar trade area to a community shopping center include:

- Home Depot
- Fry's Electronics
- Furniture Row – collection of retail furniture stores located on Los Vallecitos Blvd

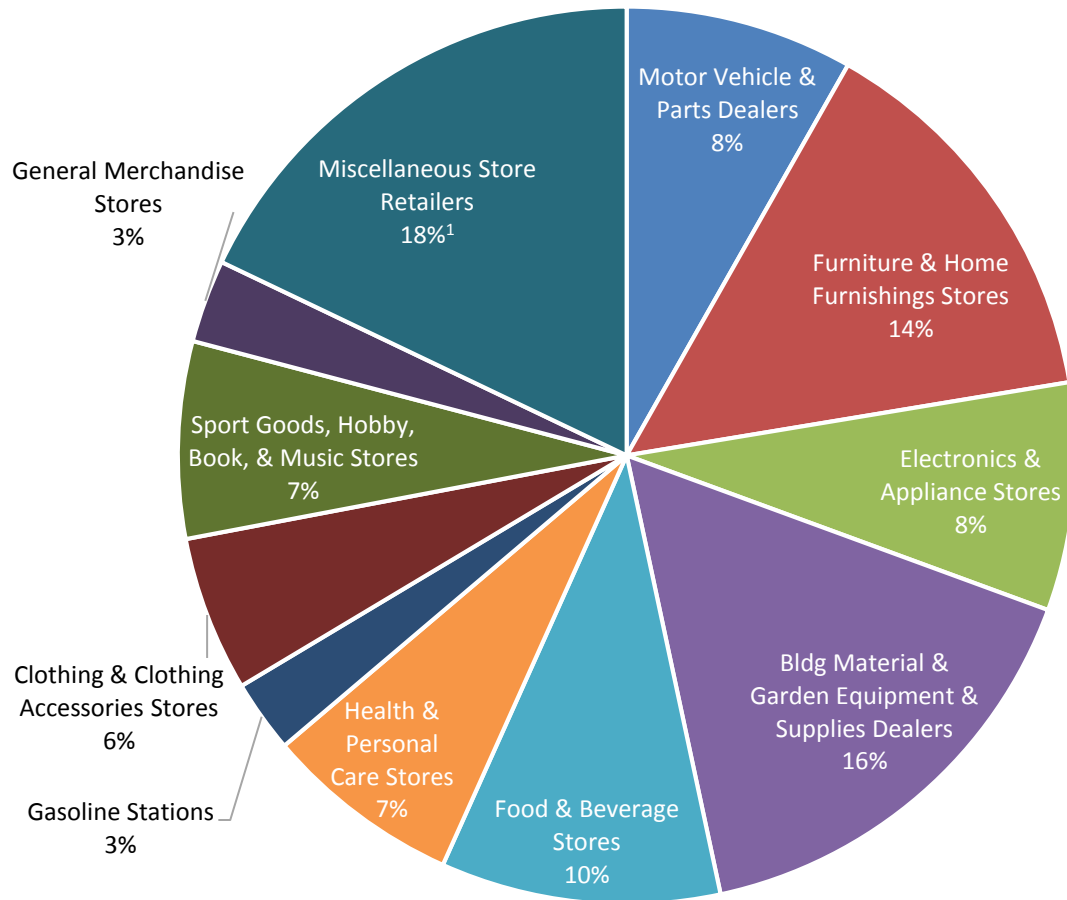
Neighborhood shopping centers generally contain a supermarket or drug store and a variety of smaller retail stores. Consumers will not drive long distances to shop at neighborhood shopping centers as compared to community shopping centers. Neighborhood shopping centers within the Creek SP Trade Area include:

- San Marcos Plaza – anchored by Albertsons
- Palomar Plaza Shopping Center – anchored by CVS
- Rancho San Marcos Village – anchored by Vons





Figure 3
Creek SP Trade Area Retail Mix



Source: ESRI

¹ Miscellaneous Store Retailers (NAICS 453) consists of store types that include Florists, Office Supplies, Stationary and Gift Stores, and Used Merchandise Stores.



CHAPTER 4.0 TRAFFIC COUNTS

Vehicle traffic counts are measured by average daily traffic (ADT) on the streets within a community. They are one of the main determinants considered when retailers select store locations due to their visibility and access. For mixed-use and downtown areas, pedestrian traffic counts would also be considered. The conversion rate of traffic counts vary amongst retail store types, and individual store brands have more precise traffic count requirements as part of their site selection process. Overall, highly traveled areas generally result in higher retail store sales opportunities and in-store performance. Higher traffic areas, such as major collectors and arterials, with counts of 15,000 ADT or higher, are often preferred over lower count areas. Intersections with high counts (often referred to as 100 percent corners) offer the highest visibility and command higher rents for leasable space due to higher demand from retailers.

EXISTING CONDITIONS

Figure 4 shows existing conditions traffic counts for segments of San Marcos Blvd through the San Marcos Creek Specific Plan area. Traffic counts are substantial making it a prime attractor for retail locations. A potential project that would create more pedestrian, bicycle and parking facilities on San Marcos Blvd would reduce ADT slightly, but it would be still be well within the threshold for supporting retail development. In fact, lower traffic speeds, parking and additional tree canopy can often increase retail attractiveness and boost overall consumer spending. Current traffic counts of 36,000 – 50,000 ADT, which indicate San Marcos Boulevard is a prime arterial, are supportive of almost all commercial retail uses.

CREEK SPECIFIC PLAN BUILDOUT YEAR 2030

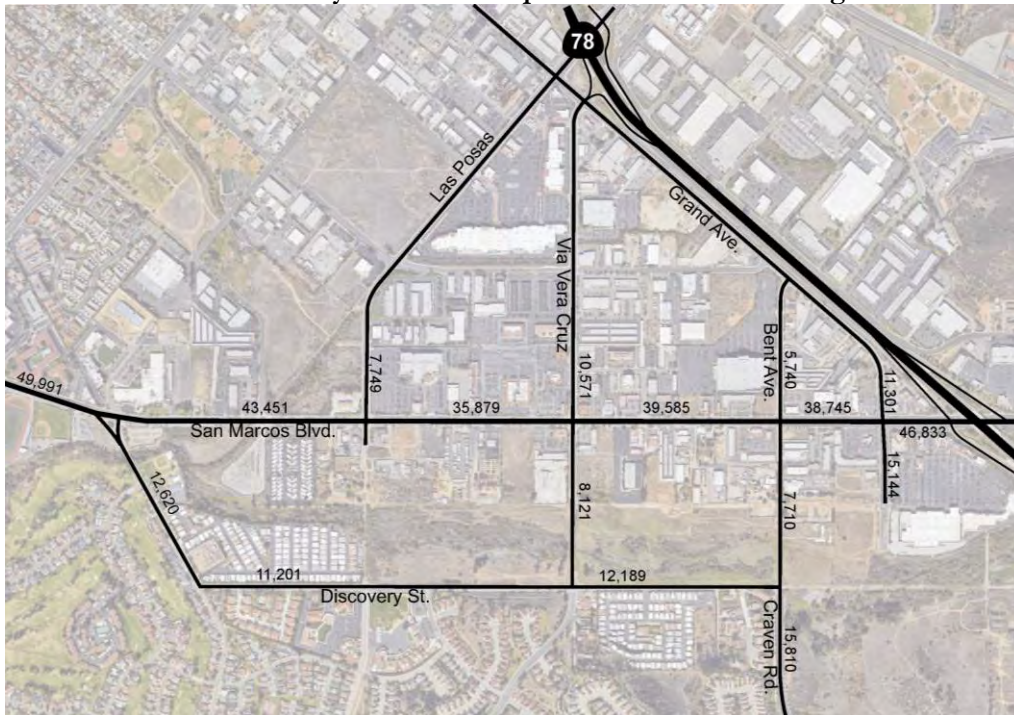
Within the specific plan area Via Vera Cruz, Bent and the proposed Main Street generate traffic volume that would generally not be supportive of retail development. The current specific plan does call for reconfiguration of the street grid that would improve internal circulation within the site. Traffic impact analyses developed as a part of the San Marcos Creek Specific Plan process call for traffic volumes of 15,500 – 22,900 ADT on Discovery and 12,000 – 19,700 ADT on Grand, which would meet the thresholds for supporting retail uses. Discovery will generally serve to by-pass the area of the specific plan targeted for future development and serve existing residential neighborhoods. See Figure 5.

Other internal streets such as McMahr Road, Via Vera Cruz, Bent and Main Street generally would not meet retail supporting thresholds. This does not necessarily mean locally serving retail (i.e. serving residents in the immediate Creek Specific Plan development) would be unsuccessful in these locations, but retail that depends on automobile visibility would likely not prosper. Another land use alternative is the use of internal retail anchors such as larger stores or destination retailers (those that generate additional traffic) to locate internally to the specific plan site to increase ADT along internal streets in which retail is desired. This is typically the layout of a modern lifestyle center that utilizes anchors to draw sufficient internal vehicle circulation to the development to support smaller retailers. See Figure 5.



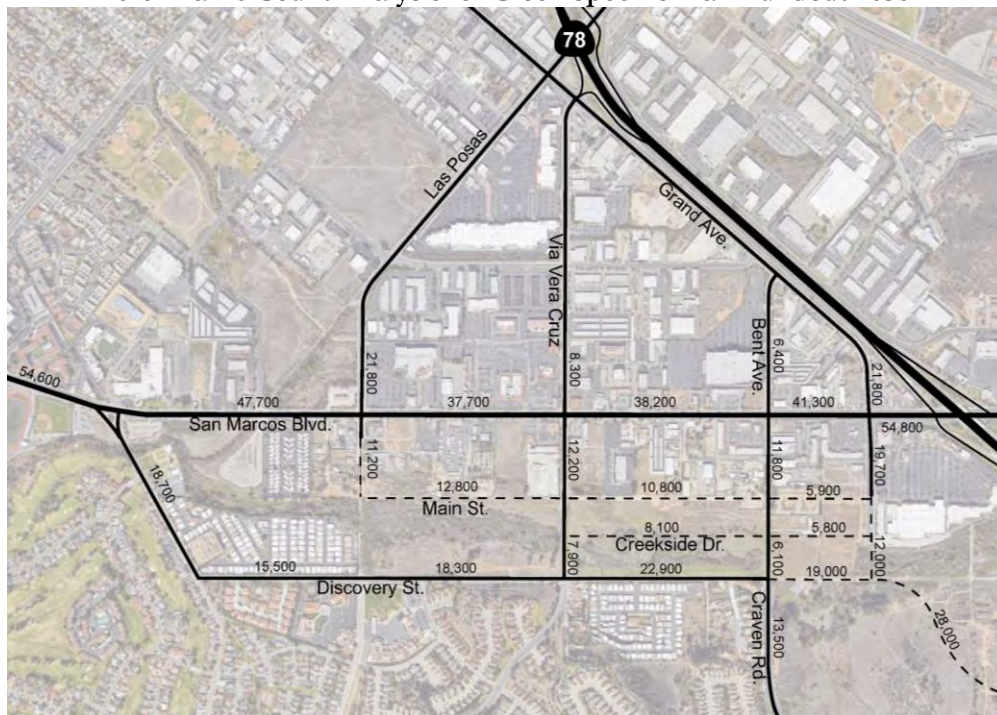


Figure 4
2017 Traffic Count Analysis for Creek Specific Plan Area Existing Conditions



Source: Michael Baker International

Figure 5
2017 Traffic Count Analysis for Creek Specific Plan Buildout 2030



Source: Michael Baker International





CHAPTER 5.0 KEY DEMOGRAPHICS

RETAIL TRADE AREA RESIDENTS

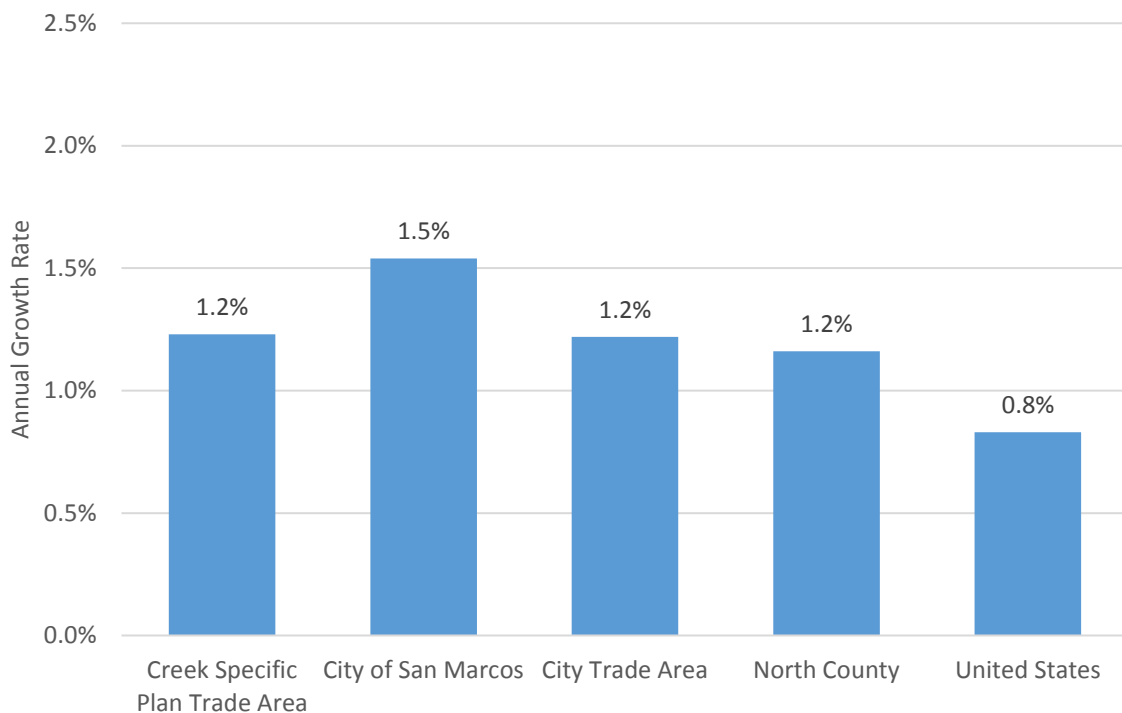
Demographic data is used to understand the typical consumer mix of the Creek SP Trade Area. This information helps estimate the potential spending patterns and purchasing power of consumers currently in the trade area. This data is contrasted with the larger City Trade Area to give an indication of the larger demographic that could be attracted to the trade area through additional housing development.

Population and Population Change

The Creek SP Trade Area has an estimated total population of 27,821. The overall City Trade Area has an estimated population of 266,634, of which 92,547 are City of San Marcos residents. Both the Creek SP Trade area and City Trade Area are expected to grow by approximately 6.3 percent over the next 5 years.

Figure 6 shows that the percent change in population for the Creek SP Trade Area compared to other geographies. As further shown in Table 1, the Creek SP Trade Area is projected to grow at a slightly slower rate than that of the City, but slightly faster than North County, in general. The Creek SP Trade Area faces some physical barriers that could impact future growth, including availability of developable space for residential development. However, the projected 6.3 percent in total population growth (over 5 years) shows the area is still growing and therefore, the overall consumer base will continue to expand.

Figure 6
Comparison of Population Projections 2016 to 2021 (Percent Change)



Source: ESRI, Michael Baker International





Table 1
Total Population and Population Projections

	2016 Estimated Population	2021 Projected Population	Percent Change 2016-2021
Creek SP Trade Area	27,821	29,574	6.3%
City of San Marcos	92,547	99,877	7.9%
City Trade Area	266,634	283,369	6.3%
North County	1,114,611	1,180,950	6.0%

Source: ESRI, Michael Baker International

Households/Household Size

The number of households in the Creek SP Trade Area (10,040 households as estimated in 2016 and shown in Table 2) is an important factor in retail site selection. Projected growth in households for the Creek SP Trade area is expected to be 5.9 percent. While this is slower than the overall projected City growth, it is in line with North County growth projections. The availability of housing and jobs in the Creek SP Trade Area play a large role in determining the future number of households for the area. It is important to note that recent studies have shown that California continues to suffer from a shortage of housing. New housing starts per capita are the second lowest (Alaska is first) amongst all 50 states. This has continued to drive housing prices upwards which has a downward impact on disposable income, spending power and growth of the local consumer base. This trend could impact future retail growth potential.

Table 2
Total Household Estimates (2016) and Projections (2021)

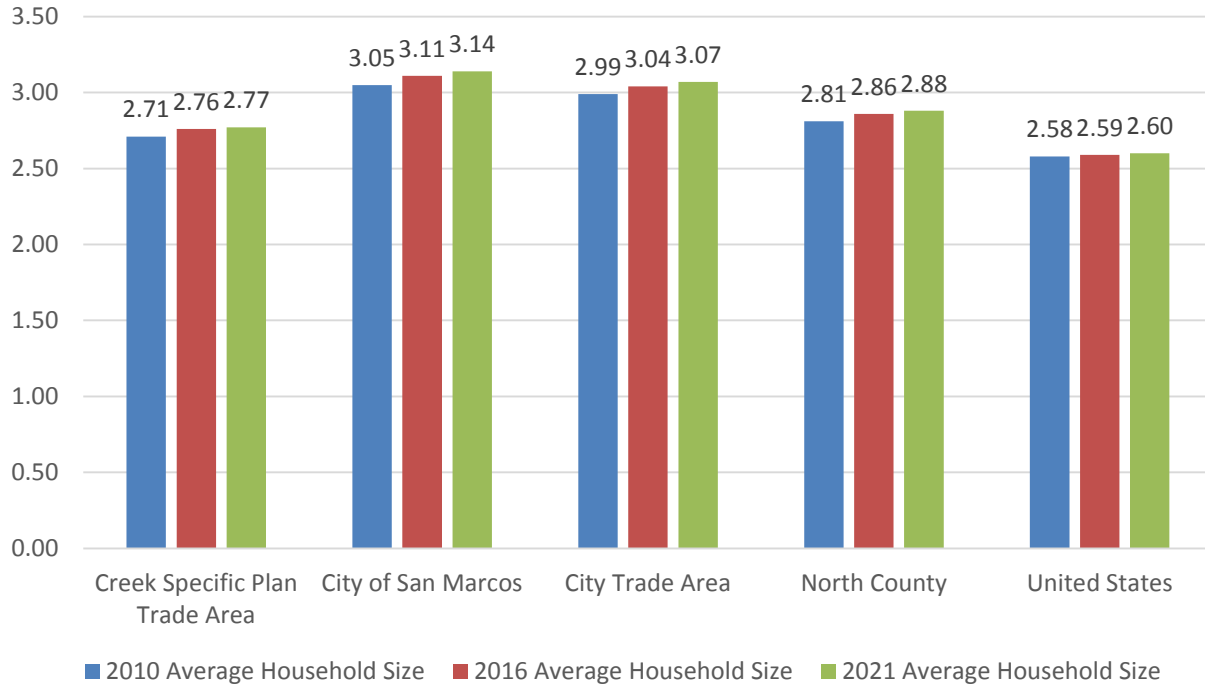
	2016 Estimated Households	2021 Projected Households	Percent Change 2016-2021
Creek SP Trade Area	10,040	10,631	5.9%
City of San Marcos	29,473	31,569	7.1%
City Trade Area	86,473	91,335	5.6%
North County	385,624	405,874	5.3%

Source: ESRI, Michael Baker International



Figure 5 shows that the estimated average household size within the Creek SP Trade Area is smaller than that of the City Trade Area, City and North County, but is still larger than the U.S. average. In conjunction with household incomes, the SP Creek Trade Area households have slightly lower purchasing power than the City Trade Area.

Figure 7
Comparison of Average Household Size (2010 – 2021)



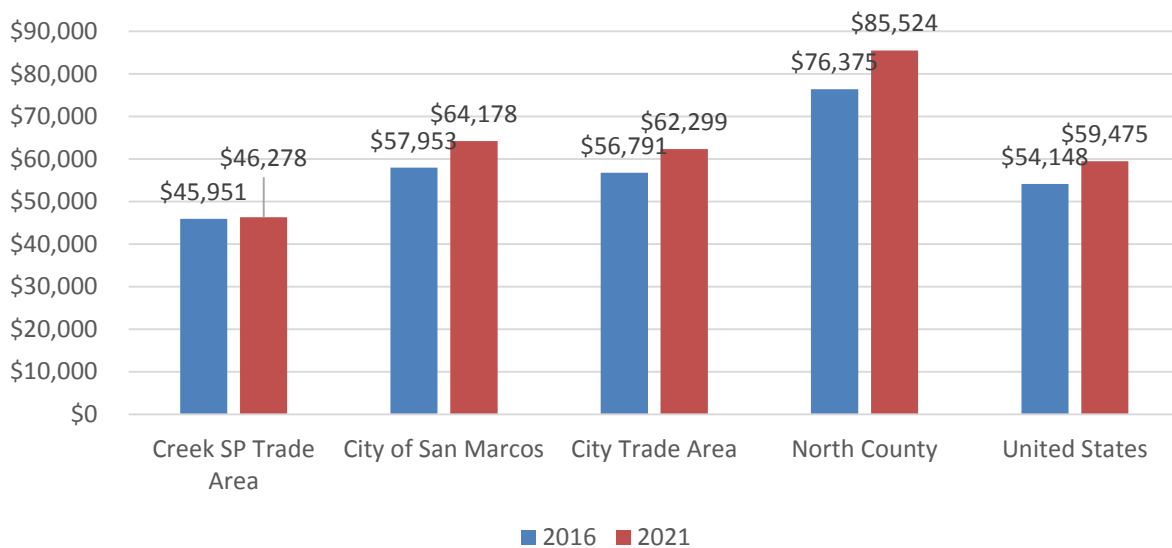
Source: ESRI, Michael Baker International



Income

The Retail Trade Area has an estimated median household income of \$45,951 and an estimated per capita income of \$22,548. The median household income of the Creek SP Trade Area is only 79 percent of the City median household income, approximately 81 percent of the City Trade Area median household income, and approximately 85 percent of the U.S. median household income. This indicates that consumers within the Creek SP Trade Area have lower overall purchasing power than consumers in the City Trade Area. See Figure 6.

Figure 8
Comparison of Median Household Income



Source: ESRI, Michael Baker International

Housing Tenure

Housing tenure tracks the percentage of owner-occupied and renter-occupied housing units. The spending preferences of people who own houses can vary from those who rent. Housing tenure does not necessarily correlate with purchasing power or household income. Recent demographic shifts, housing market volatility, changes in mobility and job tenure have created a higher market for rental units at all income levels. This is especially noticeable in California where the percentage of rental units exceeds the national average by 5.8 percent, refer to Table 3. Some consumers choose to live in rental units to avoid the additional costs and lack of flexibility that come with owning a home. However, there is debate over the trend towards renter-occupied units whether this trend is partially exacerbated by the Great Recession, lack of wage growth, full-time job availability, and/or stricter mortgage financing terms.





**Table 3
Comparison of Housing Tenure (2016)**

	Project Trade Area		City Trade Area		North County		United States	
	Number	Percent	Number	Percent	Number	Percent	Number	Percent
Total Housing Units	10,676	100.0%	91,497	100.0%	413,074	100.0%	137,671,291	100.0%
Occupied	10,040	94.0%	86,474	94.5%	385,625	93.4%	121,612,435	88.3%
Owner	5,681	53.2%	48,622	53.1%	240,482	58.2%	76,317,536	55.4%
Renter	4,359	40.8%	37,852	41.4%	145,143	35.1%	45,294,899	32.9%
Vacant	636	6.0%	5,024	5.5%	27,450	6.6%	16,058,856	11.7%

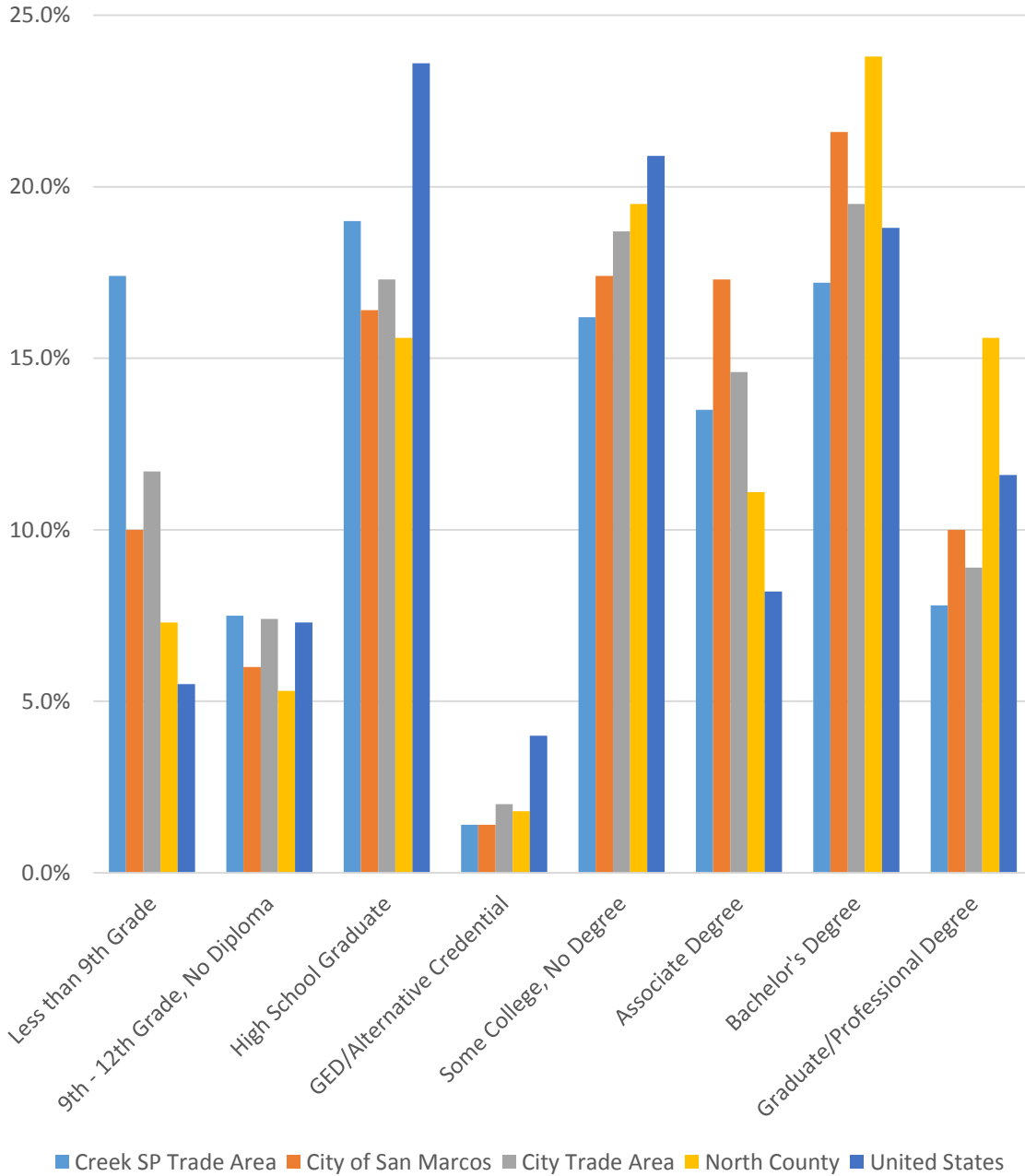
Source: ESRI

Educational Attainment

The level of educational attainment for consumers within a Creek SP Trade Area is an indicator of potential spending patterns and correlates with income and future earnings potential. Residents within the Creek SP Trade Area, on average, have a lower level of educational attainment than the City Trade Area and U.S.; refer to Figure 9. Approximately 25 percent of the residents within the Creek SP Trade Area have a Bachelor's degree or Graduate/Professional Degree compared to 30.4 percent of the U.S.



Figure 9
Comparison of Educational Attainment (2016 Estimate)



Source: ESRI, Michael Baker International





Age Distribution

Age distribution is an indicator of consumer preference and spending power. Various age groups are at different lifestyle points, and have different income levels and priorities for spending. Figure 10 shows the number of residents within each of the study geographies according to the market-based age categories that are a partial indicator of consumer preferences and behavior.

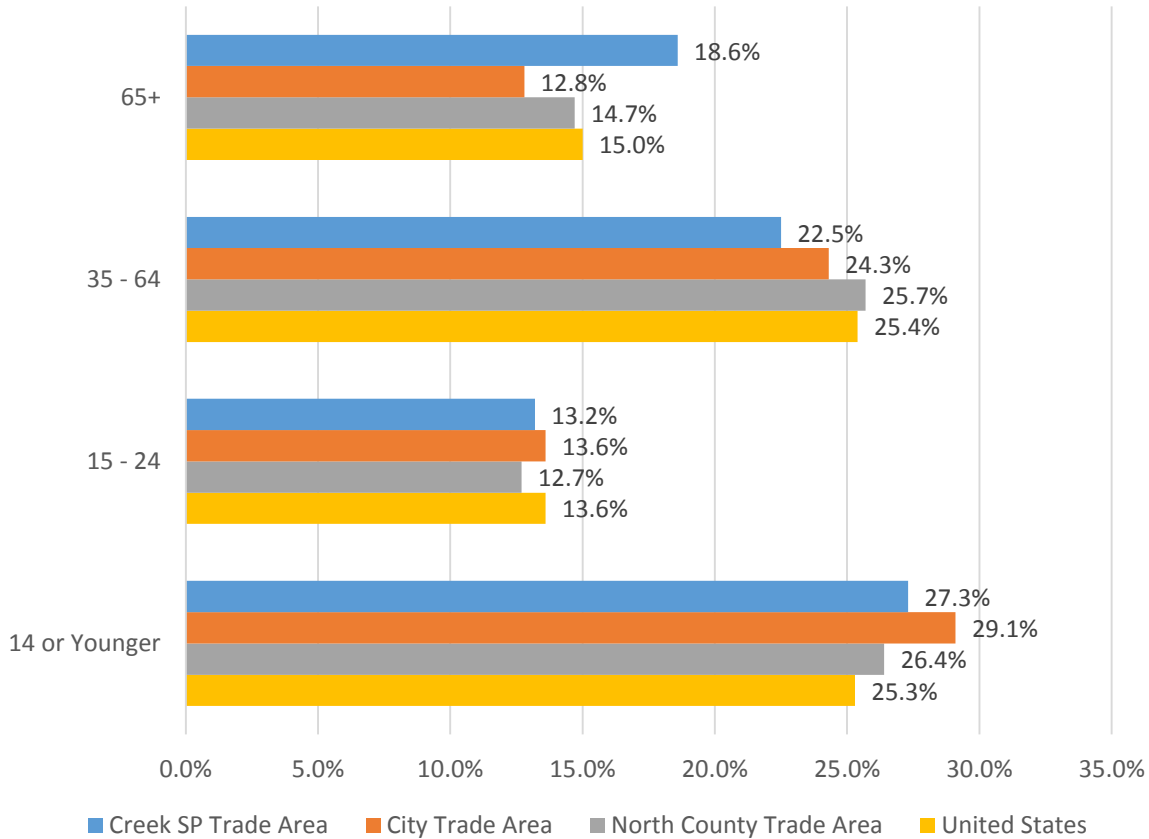
- 14 or Younger: This group has little spending power individually but are high influencers of household purchasing.
- 15 - 24: This group, known as Generation Z, ranges from teenagers to young adults, both of whom are starting to venture into the job market and have emerging spending power and high influence on household spending.
- 25 – 34: This group, known as Millennials, are emerging professionals who are establishing themselves in the job market and typically are focused on family and/or career. This generation would typically have had higher earnings based upon the performance of previous generations, but some studies indicate that this may be the first generation with less earning power than their parents. Many within this group were heavily impacted by the Great Recession and higher education costs have resulted in delayed career starts and higher debt to income ratios. However, this group is highly influential with many retailers who are increasingly adjusting product lines and advertising towards these consumers. Moderate to higher income consumers within this age range often focus on more experiential lifestyle spending over material goods.
- 35 – 64: This group, which includes late Baby Boomers and Generation X, is generally established working professionals who have higher disposable income due to higher salaries and more savings. The amount of disposable income varies greatly depending on factors such as education level, marriage, family size, etc.
- 65+: This group includes retired individuals who typically are on fixed incomes or are late career earners. This category varies greatly by geographic level in terms of overall spending power due to regional costs of living, education level, career choice, and retirement savings. Medical spending is typically higher as individual's age, which can reduce overall spending power.

Overall, the Creek SP Trade Area trends older than the City Trade Area and the U.S. average with a higher rate of 65+ persons. The City Trade Area trends slightly younger than the U.S. average although this distribution is skewed by the larger 14 and younger population.





Figure 10
Comparison of Age Distribution (2016 Estimate)



Source: ESRI, Michael Baker International

Employment and Employment Type

Figure 11 shows that the top industries for the Creek SP Trade Area are Services at 49.1 percent followed by Retail Trade and Manufacturing at 11.0 percent and 10.7 percent respectively. The employment breakdown mirrors North County and the U.S.. The types of employment in which residents are employed in is another indicator of consumer behavior and their potential spending power and preferences. Industries such as Retail Trade and Services often have lower wage rates than other sectors such as Manufacturing and Information.

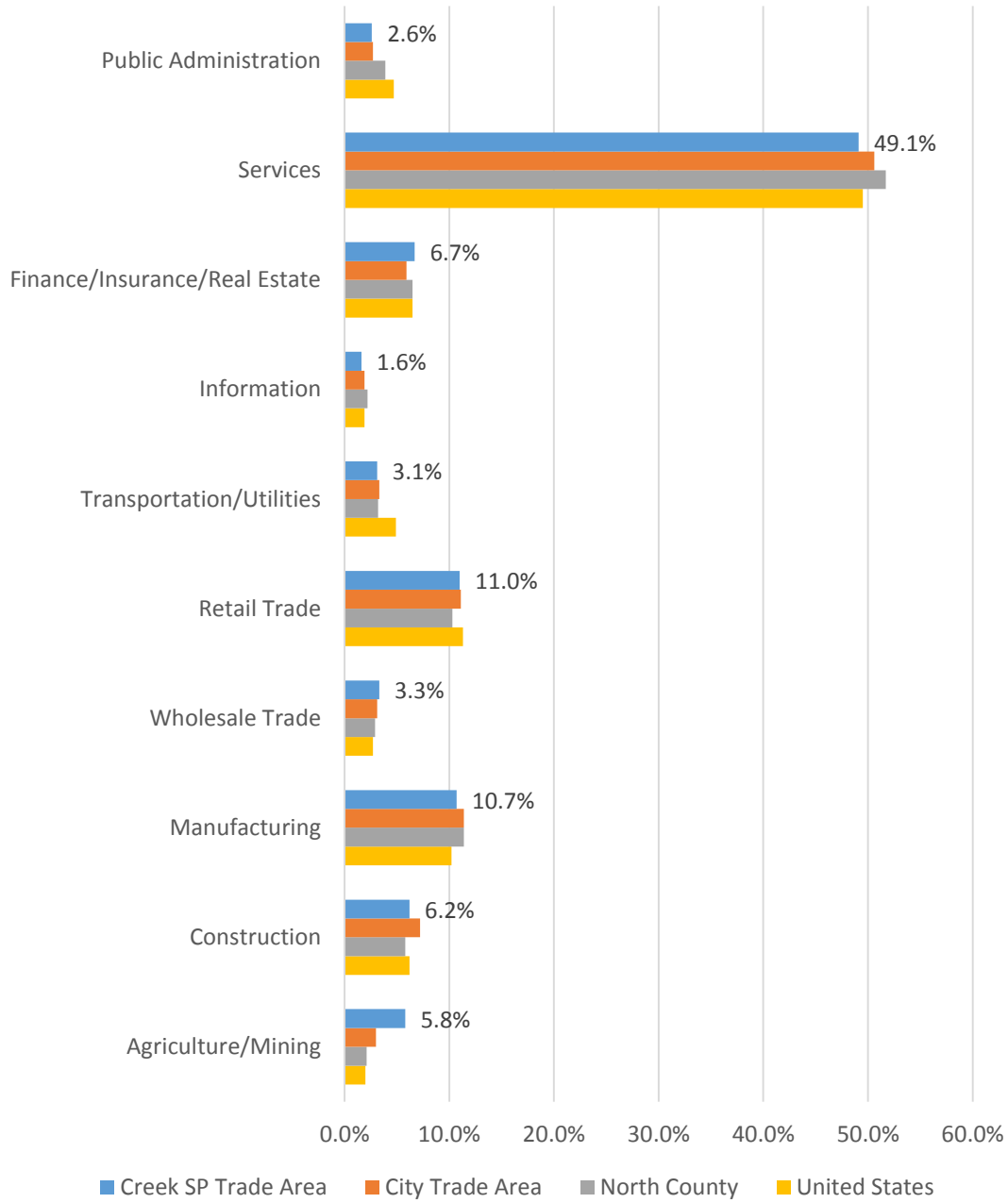
Occupation

The occupation breakdown for the Creek SP Trade Area is supportive of the employment by industries data discussed above; refer to Figure 12. The top occupations are considered Services oriented occupations at 25.9 percent, Professional at 16.7 percent and Administrative Support at 12.5 percent.





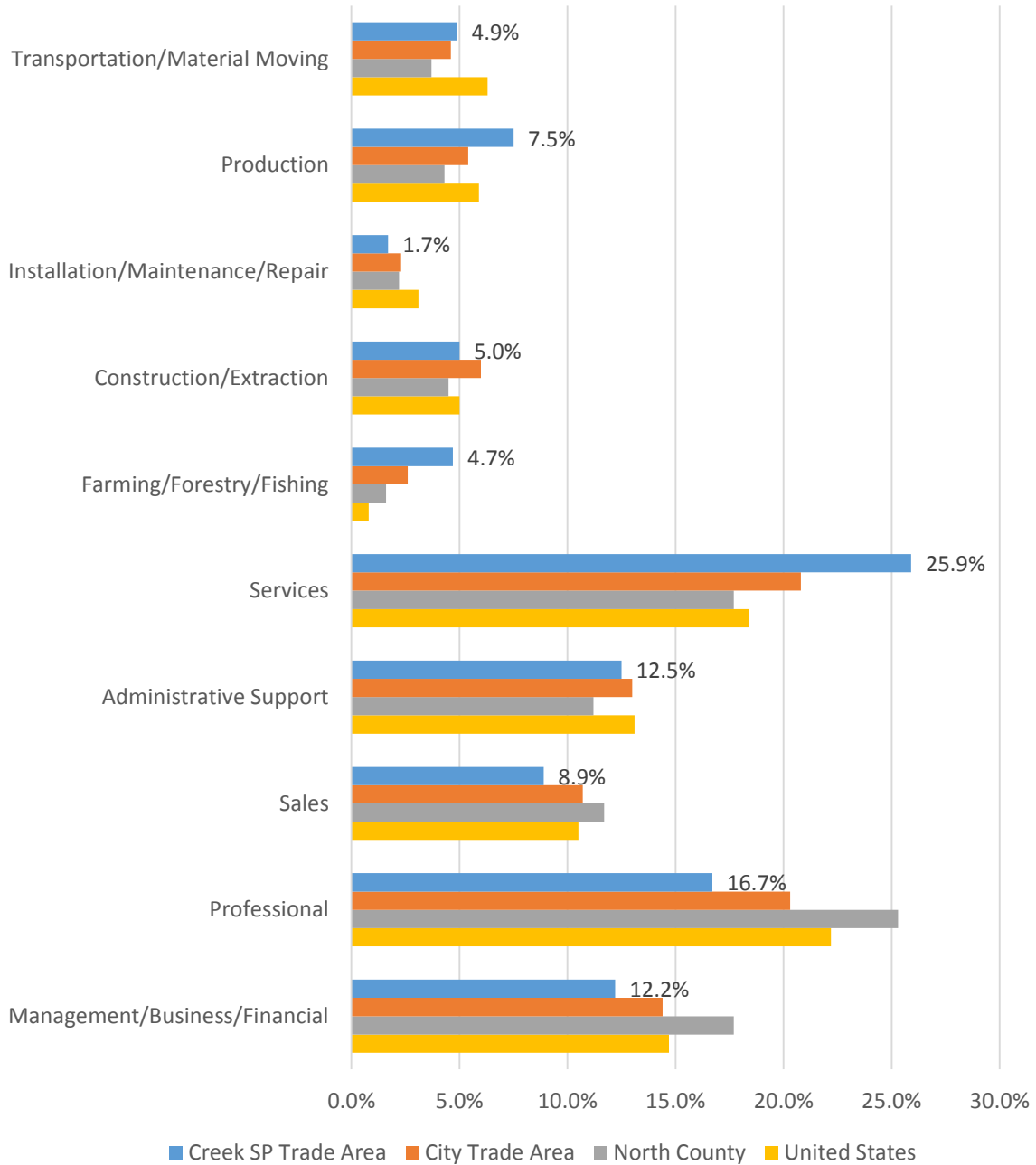
Figure 11
Comparison of Employment by Industry Types (2016 Estimate)



Source: ESRI, Michael Baker International



Figure 12
Occupation Breakdown for the Retail Trade Area (2016 Estimate)



Source: ESRI, Michael Baker International



MARKET SEGMENTATION

Consumer market segmentation systems are commonly used to describe the typical consumer lifestyle and spending habits of customers within a retail trade area. ESRI's (2016) Tapestry Segmentation area profile provides this data (divided into categories called “segments”) based on demographics, socio-economic characteristics and psychological profiling of consumer behaviors in spending, lifestyle and goods purchased. The information for segmentation profiles is collected through point of sale (POS) data, area demographics and comprehensive consumer surveys and then tracked to individual consumers who are split into lifestyle categories based on characteristics such as age, income, lifestyle choices, merchandise purchasing types, and household makeup.

This data is most commonly used by retailers when determining where to locate new stores or to modify the merchandise line mix of existing stores. For existing retail stores, the information is helpful when determining the types of services consumers in the area utilize and the types of goods they are likely to purchase.

Consumer market segmentation represent the activity of the top 75 percent of the consumers in the area. This analysis offers insight into the community to complement the demographic data.

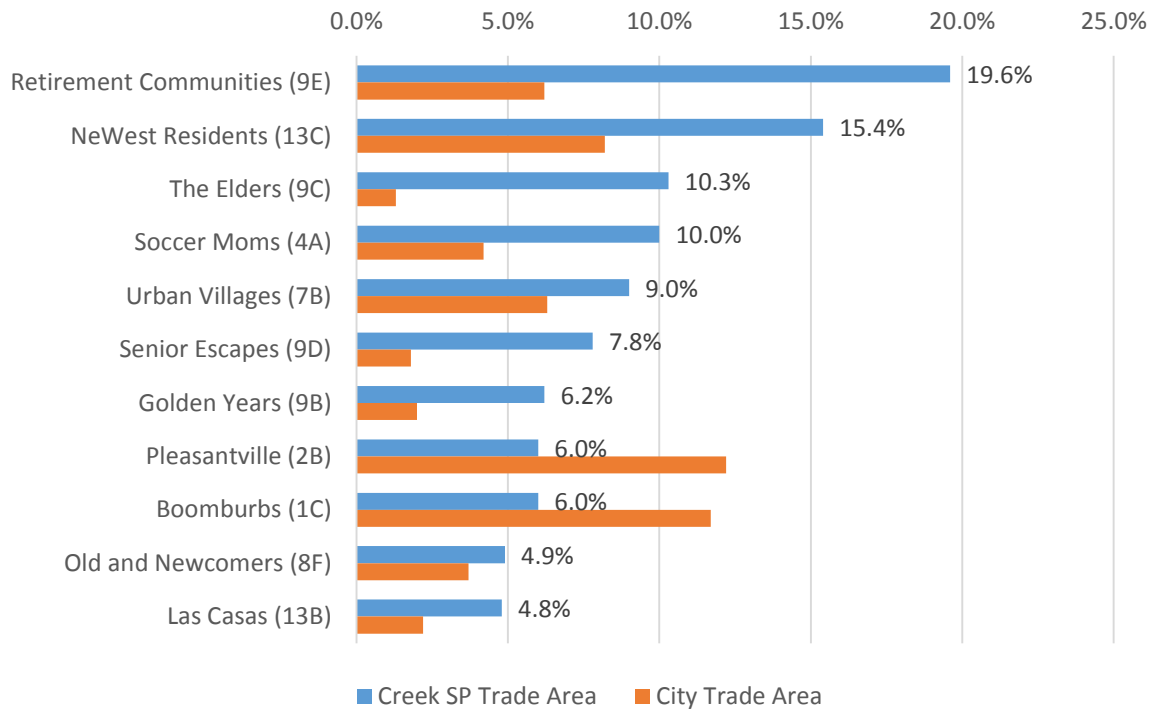
Creek SP Trade Area Market Segmentation

Figure 13 illustrates the distribution of the market segments that currently compose the Creek SP Trade Area. The 11 segments fall into 7 major affluence categories ranked higher to lower overall affluence. It is important to remember, that with all demographics, a profile does not necessarily represent one individual and is only an aggregate snapshot of the local population. The information below describes both the lifemode of the segment as well as more information specific to the individual market segment.





Figure 13
Market Segmentation for Creek SP Trade Area Compared to City Trade Area



Source: ESRI, Michael Baker International

Lifemode 1 – Affluent Estates (6.0%)

These are typically well educated, wealthy and well established married couples. Most are homeowners and have children of varying age. They expect high quality goods, invest in time-saving services and actively participate in the community.

Boomburbs (6.0%) – Well educated young professionals with low unemployment and high labor force participation. They are well connected technologically yet struggle to balance personal time and the intrusion of technology on their personal time. Homeownership rates are high, they prefer primarily single-family homes, and are willing to commute longer distances to maintain their lifestyle.

Lifemode 2 – Upscale Avenues (6.0%)

These are prosperous married couples that are ambitious and hard-working. Predominantly homeowners, they prefer denser urban settings including older homes and townhouses. They are more diverse, primarily married couples, and often have older children. They are serious shoppers frequenting stores like Nordstrom’s, Marshalls or DSW. They pursue an active lifestyle that includes bicycling, jogging and aerobics.

Pleasantville (6.0%) – These slightly older couples are situated in established neighborhoods and many have transitioned to empty-nesters. They often have higher incomes and home values. Home improvements and remodeling are often a priority. Many are professionals in finance, information, technology or management with higher dual incomes. They prefer classic fashion and prefer to spend more on quality.



Lifemode 4 – Family Landscapes (10.0%)

These are successful young families, many in their first houses. There is a high percentage of home ownership with high labor force participation and low unemployment. They are often do-it-yourselfers who work on home improvements and lands and gardens. They typically own newer sedans and SUVs, have established savings, and are comfortable with the latest technology. They eat out frequently at fast food or family restaurants.

Soccer Moms (10.0%) – Affluent market that is partial to new housing away from the bustle of the city but close enough for a comfortable commute. They favor time-saving devices, bank online, often employ housekeeping services, and focus on family-oriented pursuits. There is a higher rate of home ownership and prefer predominantly single-family homes in newer neighborhoods. Most households are married with children. They are well insured and invest but also typically carry a higher level of debt including second mortgages and auto loans.

Lifemode 7 – Ethnic Enclaves (9.0%)

These are established and diverse typically including a large number of Hispanic/Latino families. Most households are multi-lingual and represent second, third and fourth generation Hispanic/Latino families. They are hard-working, optimistic, and often possess a high school education and some college. Shopping and leisure often focuses on children’s products and entertainment that involves children.

Urban Villages (9.0%) – Residents are multicultural, multigenerational and multilingual. They are trendy and fashion conscious and often risk takers. They focus on their children and shop at diverse stores like Costco, Whole Foods, Target and Nordstrom. They typically occupy older single-family homes, are married couples with children and often have multigenerational households that include grandparents. The labor participation is high but unemployment is higher than the national average. They are brand conscious but often willing to try new brands and trends.

Lifemode 8 – Middle Ground (4.9%)

These are typically thirtysomething (millennials) with a mix of single and married, renter and homeowner, middle class and working class. They prefer an urban market mix including single-family, townhome and multi-unit dwellings. A majority have attained a college degree. They are most likely to utilize digital only content and often do not have landlines. They spend a significant amount of time online with other leisure activities including night life, the beach, travel and hiking.

Old and Newcomers (4.9%) – This market features singles that are on a budget. They focus more on convenience than consumerism and economy over acquisition. They often target transitional neighborhoods populated by renters who are beginning their careers. Over 54 percent, on average, rent than own their home. The overall age mix is significant with age not being a distinguishing factor in lifestyle choice. Approximately 30 percent of this market, on average is receiving Social Security. They are price aware, coupon clippers, but often open to impulse buys. They are attentive to environmental concerns and more adverse to automobile ownership.

Lifemode 9 – Senior Styles (43.9%)

This group is older and has saved for retirement. Households are commonly empty-nesters or singles living alone, retirement communities and senior living. Many still prefer print over digital media and are routine watchers of Fox News, CNN and The Weather Channel. Many prefer supplements as a part of their overall health and exercise regimen.

Retirement Communities (19.6%) – These often combine single-family homes with independent living and assisted living apartments, and continuing nursing care. Typically over half of all housing units are multi-unit structures and a majority of residents lease. This market stays up to date through





cable news and newspapers. They take pride in fiscal responsibility although net worth is, on average, below that of national averages. Activities enjoyed include theatre, gold, and vacations. They often choose to dine out over cooking at home.

The Elders (10.3%) – This is ESRI market segmentation’s oldest market. The Elders favor communities designed for senior living in primarily warmer climates. Most are homeowners although housing varies from mobile homes to single-family residents and high-rise apartments. These seniors are often independent and highly involved in the community. Half are married couples without children and half are single households although approximately 60 percent are in group quarters including assisted living facilities and nursing homes. Income is derived through retirement savings and Social Security.

Senior Escapes (7.8%) – Often began as second homes in warmer climates, most now are primary residents. Over 40 percent are mobile homes with the remaining predominantly single-family dwellings. Residents enjoy watching TV, going on cruises, golfing, boating and fishing. They are very conscious of health and buy specialty foods and supplements. Most spend well within their means with the primary earnings being from Social Security and retirement savings.

Golden Years (6.2%) – These are often active seniors close to retirement or recently entered retirement. 40 percent, on average, are single person households and one-third are empty nesters. They are well educated with low unemployment, although lower labor participation due to many reaching retirement age. Median household incomes are often higher due to a mix of wage earnings, retirement income and Social Security. These consumers are often well connected to the internet, are charitable, and actively pursue leisure interests like travel, sports, dining out, museums and concerts.

Lifemode 13 – Next Wave (19.2%)

These are typically young, diverse hard-working urban families. They typically are extremely diverse with a large Hispanic/Latino majority. A large share are foreign-born and speak only their native language. Young or multigenerational families are typical. Most are renters in multi-unit structures and often commute longer distances for employment. Spending reflects a focus on the family but are also a top market for movies and fast food.

NeWest Residents (15.4%) – This is a young Hispanic/Latino market that are new to careers and often have new young families. On average, more than a third of families are linguistically isolated. They are ambitious and will take risks to benefit their families. They often work long hours primarily in the service industry. Female participation in the market is often lower due to family responsibilities. Most are renters of mid to high-rise apartments.

Las Casas (4.8%) – This is a family-oriented market that is distinguished by multigenerational households and a focus on children. Spending is often on baby food, children’s apparel, children’s furniture and convenience dining (fast food and family restaurants). They prefer a mix of housing from single-family to smaller apartments and primarily rent. On average, more than 42 percent of the population was borne abroad. The unemployment rate is high and labor force participation is average.

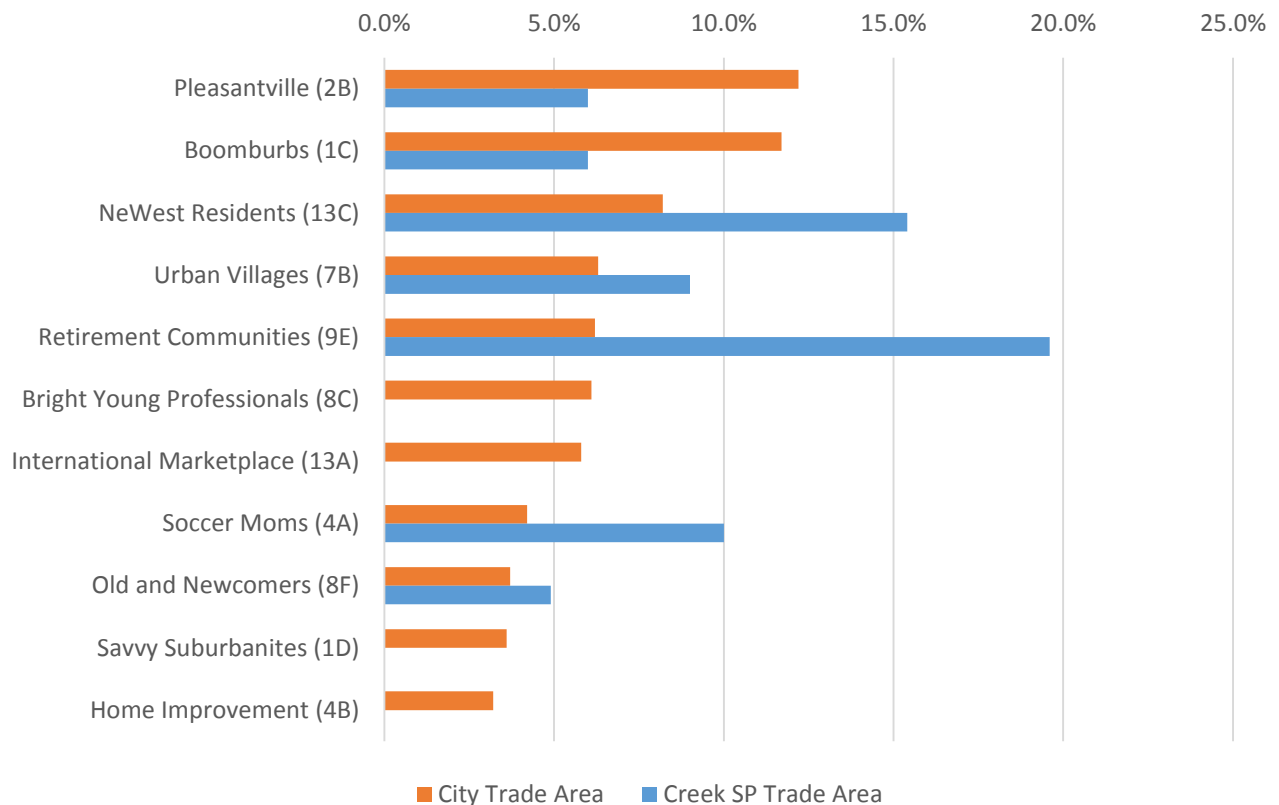




City Trade Area Market Segmentation

New development that is planned by the San Marcos Creek Specific Plan will likely pull new residents from a larger demographic base and geographic area. For that reason, understanding the market segmentation of the City Trade Area can help understand potential consumer preferences for new retail and housing development opportunities within the San Marcos Creek Specific Plan area. Figure 14 illustrates the distribution of the primary market segments that currently compose the City Trade Area. The 11 segments fall into 8 major affluence categories ranked higher to lower overall affluence.

Figure 14
Market Segmentation for Creek SP Trade Area Compared to City Trade Area



Source: ESRI

Lifemode 1 – Affluent Estates (15.3%)

These are typically well educated, wealthy and well established married couples. Most are homeowners and have children of varying age. They expect high quality goods, invest in time-saving services and actively participate in the community.

Boomburbs (11.7%) – Well educated young professionals with low unemployment and high labor force participation. They are well connected technologically yet struggle to balance personal time and the intrusion of technology on their personal time. Homeownership rates are high, they prefer primarily single-family homes, and are willing to commute longer distances to maintain their lifestyle.





Savvy Suburbanites (3.6%) – Residents are well read, well-educated and well capitalized. Families include empty nesters and aspiring empty nesters who have adult children at home. The suburban lifestyle includes home remodeling, gardening and active pursuits of sports and exercise. They enjoy good food, good wine and cultural events. This group prefers primarily single-family homes and has a high ownership rate. They typically research prior to shopping and focus on quality.

Lifemode 2 – Upscale Avenues (12.2%)

These are prosperous married couples that are ambitious and hard-working. Predominantly homeowners, they prefer denser urban settings including older homes and townhouses. They are more diverse, primarily married couples, and often have older children. They are serious shoppers frequenting stores like Nordstrom's, Marshalls or DSW. They pursue an active lifestyle that includes bicycling, jogging and aerobics.

Pleasantville (12.2%) – These slightly older couples are situated in established neighborhoods and many have transitioned to empty-nesters. They often have higher incomes and home values. Home improvements and remodeling are often a priority. Many are professionals in finance, information, technology or management with higher dual incomes. They prefer classic fashion and prefer to spend more on quality.

Lifemode 4 – Family Landscapes (7.4%)

These are successful young families, many in their first houses. There is a high percentage of home ownership with high labor force participation and low unemployment. They are often do-it-yourselfers who work on home improvements and lands and gardens. They typically own newer sedans and SUVs, have established savings, and are comfortable with the latest technology. They eat out frequently at fast food or family restaurants.

Soccer Moms (4.2%) – Affluent market that is partial to new housing away from the bustle of the city but close enough for a comfortable commute. They favor time-saving devices, bank online, often employ housekeeping services, and focus on family-oriented pursuits. There is a higher rate of home ownership and prefer predominantly single-family homes in newer neighborhoods. Most households are married with children. They are well insured and invest but also typically carry a higher level of debt including second mortgages and auto loans.

Home Improvement (3.2%) – Most residents prefer single-family homes and home ownership is predominant. They prefer low density. Over half of all households are married-couple families. They have higher participation in the labor force and low unemployment. They are cautious consumers and do research before purchases or investing. They spend a significant amount of time on commutes and car repair. Debt ratios are higher due to student loans and second mortgages. They spend heavily on eating out at both fast food and family restaurants.

Lifemode 7 – Ethnic Enclaves (6.3%)

These are established and diverse typically including a large number of Hispanic/Latino families. Most households are multi-lingual and represent second, third and fourth generation Hispanic/Latino families. They are hard-working, optimistic, and often possess a high school education and some college. Shopping and leisure often focuses on children's products and entertainment that involves children.

Urban Villages (6.3%) – Residents are multicultural, multigenerational and multilingual. They are trendy and fashion conscious and often risk takers. They focus on their children and shop at diverse stores like Costco, Whole Foods, Target and Nordstrom. They typically occupy older single-family homes, are married couples with children and often have multigenerational households that include grandparents. The labor participation is high but unemployment is higher than the national average. They are brand conscious but often willing to try new brands and trends.





Lifemode 8 – Middle Ground (9.7%)

These are typically thirtysomething (millennials) with a mix of single and married, renter and homeowner, middle class and working class. They prefer an urban market mix including single-family, townhome and multi-unit dwellings. A majority have attained a college degree. They are most likely to utilize digital only content and often do not have landlines. They spend a significant amount of time online with other leisure activities including night life, the beach, travel and hiking.

Bright Young Professionals (6.1%) – Typically located in the outskirts of large metro areas, this is a large market. The market is young, educated and working professionals with, on average, 1 of 3 households under the age of 35. There are slightly more renters than homeowners and over one-third live in multi-unit structures while 40 percent live in single-family dwellings. Median household income are close to overall U.S. averages. Residents are physically active and keep up with the latest technology. They get most of their information from the internet. Their concern about the environment weighs on their purchasing decisions.

Old and Newcomers (3.7%) – This market features singles that are on a budget. They focus more on convenience than consumerism and economy over acquisition. They often target transitional neighborhoods populated by renters who are beginning their careers. Over 54 percent, on average, rent than own their home. The overall age mix is significant with age not being a distinguishing factor in lifestyle choice. Approximately 30 percent of this market, on average is receiving Social Security. They are price aware, coupon clippers, but often open to impulse buys. They are attentive to environmental concerns and more adverse to automobile ownership.

Lifemode 9 – Senior Styles (6.2%)

This group is older and has saved for retirement. Households are commonly empty-nesters or singles living alone, retirement communities and senior living. Many still prefer print over digital media and are routine watchers of Fox News, CNN and The Weather Channel. Many prefer supplements as a part of their overall health and exercise regimen.

Retirement Communities (6.2%) – These often combine single-family homes with independent living and assisted living apartments, and continuing nursing care. Typically over half of all housing units are multi-unit structures and a majority of residents lease. This market stays up to date through cable news and newspapers. They take pride in fiscal responsibility although net worth is, on average, below that of national averages. Activities enjoyed include theatre, golf, and vacations. They often choose to dine out over cooking at home.

Lifemode 13 – Next Wave (14.0%)

These are typically young, diverse hard-working urban families. They typically are extremely diverse with a large Hispanic/Latino majority. A large share are foreign-born and speak only their native language. Young or multigenerational families are typical. Most are renters in multi-unit structures and often commute longer distances for employment. Spending reflects a focus on the family but are also a top market for movies and fast food.

NeWest Residents (8.2%) – This is a young Hispanic/Latino market that are new to careers and often have new young families. On average, more than a third of families are linguistically isolated. They are ambitious and will take risks to benefit their families. They often work long hours primarily in the service industry. Female participation in the market is often lower due to family responsibilities. Most are renters of mid to high-rise apartments.

International Marketplace (5.8%) - These residents are diverse with a rich blend of cultures. Almost 40 percent, on average, of residents are foreign born and 1 in 4 households are linguistically isolated.





It is a young and diverse family market with a notable amount of intergenerational households. Most prefer multi-unit structures and rent. Both labor force participation and unemployment rates are higher than the national average. They are hardworking consumers striving to get ahead. Consumers are attentive to personal style and purchases reflect their youth and children.

KEY DEMOGRAPHICS SUMMARY

- **Growth Projections:** The Creek SP Trade Area is expected to grow at an annual rate of 1.2 percent, which is slightly less than the City's projected annual growth rate of 1.5 percent but on par with North County growth. Growth projections are based upon existing conditions and past growth. New development within the San Marcos Creek Specific Plan will result in changes to the trade area's growth projections.
- **Household Characteristics:** The Creek SP Trade Area has an estimated 2.8 persons per household, which is 7.8 percent higher than the U.S. average of 2.6 persons per household but is smaller than the City of San Marcos and City Trade Area of 3.1 and 3.0 respectively. The Creek SP Trade Area has an estimated median household income that is 14.2 percent lower than the U.S. average and 20.7 percent lower than that of the City of San Marcos. The smaller household size and lower estimated household income indicates lower overall purchasing power for residents within the Creek SP Trade Area than the City or City Trade Area population.
- **Housing Characteristics:** The percent of owner-occupied housing within the Creek SP Trade Area (53.2 percent) is lower than the U.S. average of 55.4 percent. Renter occupied housing within the Creek SP Trade Area (40.8 percent) is significantly higher than the U.S. average of 32.9 percent, but comparable with the larger City Trade Area (41.4 percent). Recent demographic shifts, housing market volatility, changes in mobility and job tenure have created higher demand for rental units at all levels of income. This is especially noticeable in California with a higher concentration of rental units than the national average of 34.9 percent by 5.8 percent.
- **Educational Attainment:** Residents of the Creek SP Trade Area have overall educational attainment rates lower than that of the City of San Marcos, City Trade Area and U.S. Average. Approximately 25 percent of residents within the Creek SP Trade Area have a Bachelor's Degree or higher compared to 31.6 percent for the City of San Marcos, 28.4 percent for the City Trade Area and 30.4 percent for the U.S..
- **Median Age:** The total estimated median age of the Creek SP Trade Area is 37 years, which is slightly lower than the North County and U.S. averages of 38 years but higher than the City of San Marcos and City Trade Area of 34.2 and 34.6 years respectively. When examining major consumer age groups, the Creek SP Trade Area has a higher proportion of residents aged 65+ than the City Trade Area and U.S. averages. The Creek SP Trade Area has a higher population of 14 and younger than the U.S. average.
- **Employment:** Compared to the U.S., residents within the Creek SP Trade Area are employed across industries in the same proportion as the country as a whole. When examining occupations, the Creek SP Trade Area had a higher concentration of workers in service jobs than the City Trade Area or U.S. average.





- **Creek Specific Plan Trade Area Market Segments:** When examining ESRI’s Tapestry Market Segmentation data, the Creek SP Trade Area, while having a diversity of market segments, as a whole has a higher concentration of residents in market segments with lower overall affluence than the City Trade Area.
- **City Trade Area Market Segments:** The City Trade Area contains a more diverse group of market segments than the Creek SP Trade Area. This is important as a potential future consumer/customer base for future housing and retail opportunities within the Creek Specific Plan area. Segments such as Boomburbs, Savvy Suburbanites, and Home Improvements have high rates of eating out, which could support additional restaurant establishments in the area. Market segments such as Bright Young Professionals and Old and Newcomers are more supportive of market-rate multi-unit dwellings which are proposed for the Creek Specific Plan area.





CHAPTER 6.0 TRADE CAPTURE AND PERFORMANCE

This analysis examines retail demand within the Creek SP Trade Area through consumer expenditures, overall retail supply, and retail sales, in order to provide insight into existing and future retail performance by retail store type. The analysis of retail performance and potential is broken down by an analysis of existing demand, an analysis of existing supply, and an integrated analysis to determine potential unmet demand by store type and retail growth potential. This analysis will provide a baseline for present day demand. In addition, the City Trade Area was analyzed to compare and contrast overall retail demand in the San Marcos area with that of the Creek SP Trade Area. Finally retail demand projections were produced based upon growth scenarios based upon development within the San Marcos Creek Specific Plan area. Information provided by this report can:

- Determine existing market strengths that attract consumers from outside of the Creek SP Trade Area to shop in the Creek SP Trade area;
- Better define potential target retail store types that could be attracted to the Creek Specific Plan area either through new development, infill or existing vacancies;
- Determine market recruitment targets;
- Provide a better understanding of the current consumer-base to better inform economic policy; and
- Inform potential changes to land use policies based upon market demand.

Certain retail store types were not analyzed due to a variety of factors including having an extremely localized demand (i.e., gas stations), requiring more extensive analysis (i.e., hospitality) or the type of operation may or may not serve local customers (e.g., internet sales only, catering only, etc.). The following retail subsectors were not included within this analysis:

- Gasoline Stations (NAICS 447)
- Non-Store Retailers (NAICS 454)
- Special Foodservices (NAICS 7223)

DEMAND ANALYSIS

Demand for the market area is measured through consumer expenditures. The consumer expenditures are estimates on what, by retail store type, consumers who live within a trade area spend their money. In addition, the Creek SP Trade Area geography, while undoubtedly experiencing some local tourism, is probably offset by expenditures by Creek SP Trade Area residents touring elsewhere.

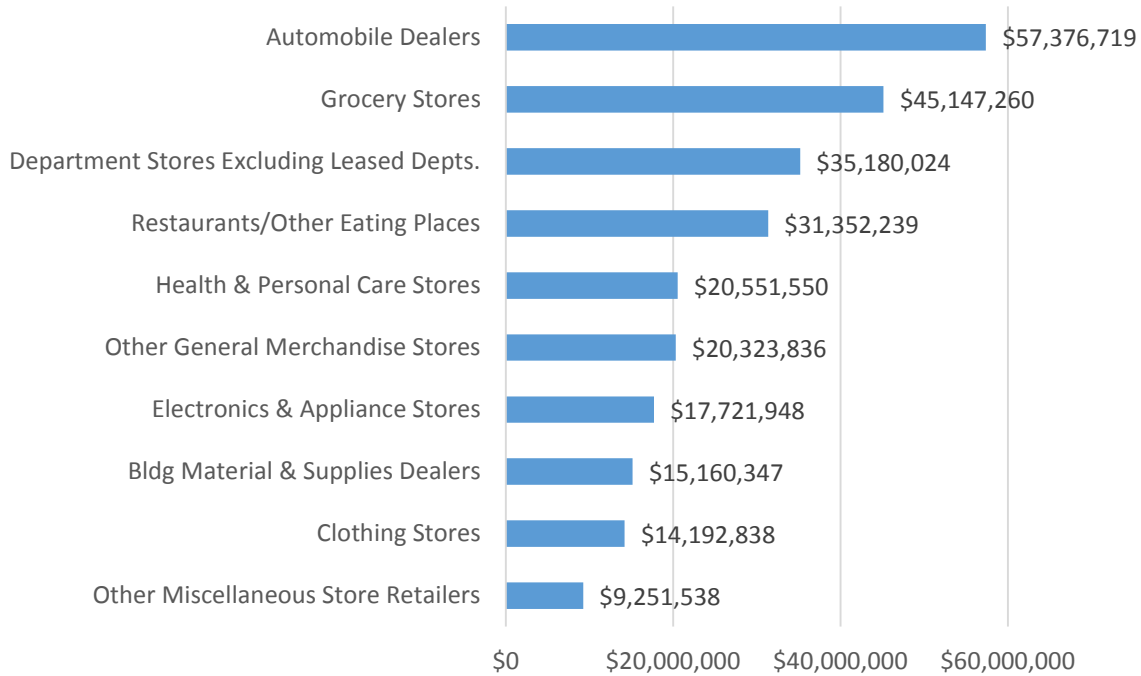
Top Expenditures

Consumer expenditures were analyzed to determine how consumers who live within the Creek SP Trade Area allocate their spending; refer to Figure 15. This analysis of spending gives a sense of the overall major demand for store types within the trade area.



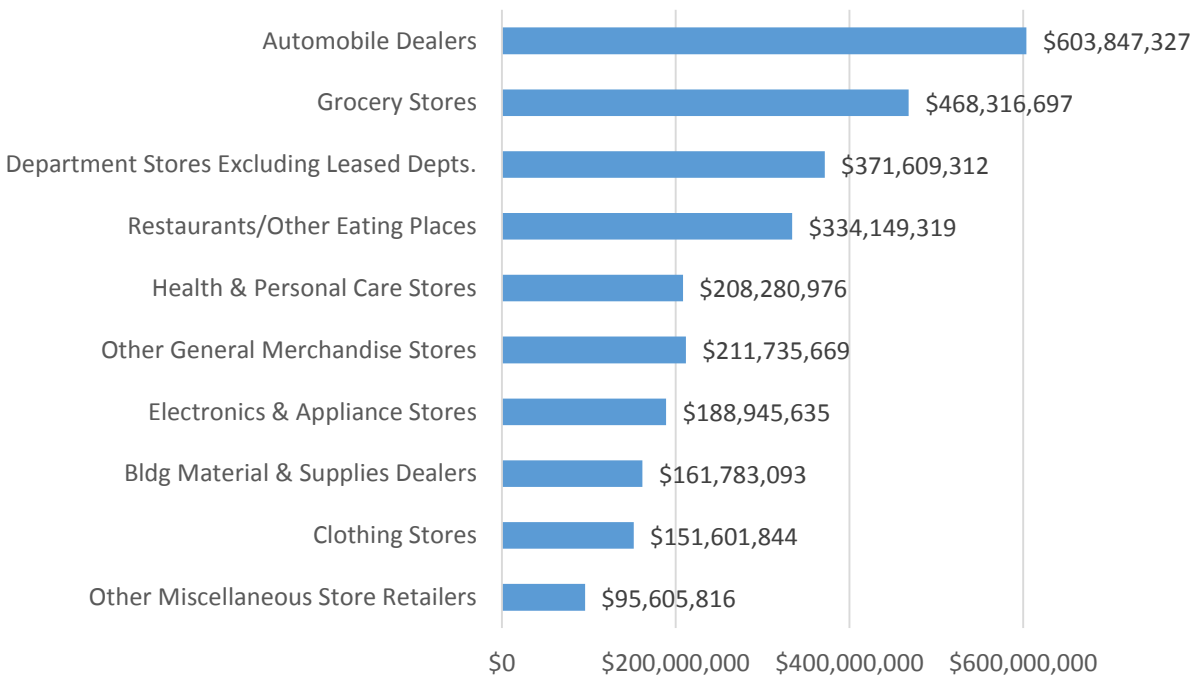


Figure 15
Top 75 Percent of Expenditures by Creek SP Trade Area Consumers by Retail Store Type



Source: ESRI, Michael Baker International

Figure 16
Top 75 Percent of Expenditures by City Trade Area Consumers by Retail Store Type



Source: ESRI, Michael Baker International





Consumers within the Creek SP Trade Area generate an estimated \$347 million annually in consumer spending on retail goods and services. Consumers within the City Trade Area generate over \$3.65 billion in consumer expenditures. The Creek SP Trade Area constitutes approximately 9.5 percent of the overall City Trade Area’s expenditures.

In examining the top three quartiles of expenditures, over 16.5 percent of consumer spending by retail store type is at Automotive Dealers (NAICS 441100). This includes the purchase of new or used automobiles and services. Approximately 13.0 percent of consumer spending within the Creek SP Trade Area, over \$45.1 million annually, is spent in Grocery Stores (NAICS 445110) and 10.1 percent, \$35.2 million annually, is spent in Department Stores (NAICS 4521) . Restaurants/Other Eating Places (NAICS 7225) generates almost \$31.4 million annually which is 9.0 percent of annual expenditures (Figure 16).

RETAIL SUPPLY AND RETAIL ATTRACTORS

Retail supply was analyzed to determine the overall supply of retail both within the Creek SP Trade Area and City Trade Area represented by estimated total sales. Retail sales are estimated only for those establishments that are within each trade area boundaries. Overall sales do not differentiate between customers coming from within or outside of each trade area.

Overall sales within the Creek SP Trade Area are \$589.5 million annually. The top 75 percent retail store type sales as shown in Table 4, include:

Table 4
Top 75 Percent of Retail Sales for the Creek SP Trade Area by Retail Store Type

Creek SP Trade Area		
NAICS Industry Summary	NAICS	Supply (Retail Sales)
Restaurants/Other Eating Places	7225	\$86,015,622
Electronics & Appliance Stores	4430	\$85,263,691
Grocery Stores	4451	\$68,534,556
Bldg Material & Supplies Dealers	4441	\$59,957,742
Furniture Stores	4421	\$50,914,370
Other Motor Vehicle Dealers	4412	\$47,163,394
Other Miscellaneous Store Retailers	4539	\$34,504,601

Source: ESRI, Michael Baker International

Restaurants/Other Eating Places generated over \$86 million in retail sales within the Creek SP Trade Area. This was followed by Electronics & Appliance Stores (\$85.3 million), Grocery Stores (\$68.5 million), Building Material & Supplies Dealers (\$60.0 million) and Furniture Stores (\$50.9 million). These store types are also key components of the retail mix of the Creek SP Trade Area that includes Restaurant Row, Furniture Row, and major electronics/appliance establishments including Fry’s and Best Buy.



Table 5
Top 75 Percent of Retail Sales for the City Trade Area by Retail Store Type

City Trade Area		
NAICS Industry Summary	NAICS	Supply (Retail Sales)
Automobile Dealers	4411	\$1,556,521,825
Grocery Stores	4451	\$566,680,765
Restaurants/Other Eating Places	7225	\$376,989,371
Bldg Material & Supplies Dealers	4441	\$361,176,294
Department Stores Excluding Leased Depts.	4521	\$326,159,511
Other General Merchandise Stores	4529	\$323,481,633
Electronics & Appliance Stores	4430	\$277,004,549

Source: ESRI, Michael Baker International

The City Trade Area top 75 percent of sales, as shown in Table 5, included a diverse mix of retail store types including Automobile Dealers, with \$1.6 billion in annual sales. It should be noted that a large majority of the Automobile Dealer establishments were located within the trade area but outside of the City of San Marcos in nearby Escondido. Department Stores, Other General Merchandise Stores (which can include a diverse mix from Costco to Big Lots) and Electronics & Appliance stores are typically primary retail anchors and capture 18.6 percent of overall retail sales. Building Materials and Supply Dealers account for approximately \$361.2 million in annual sales and include a diverse set of establishments including anchors such as Lowe’s and Home Depot, and also a number of smaller specialized businesses such as lighting stores, flooring stores, plumbing supply and other specialized material and supply establishments.

City of San Marcos Performance

The City of San Marcos captures over 27.6 percent of the City Trade Area’s market share of sales for a total of \$1.4 billion annually. (It should be noted that City figures supplied by ESRI may not reflect figures supplied by the California Board of Equalization. Methodology for apportionment of retail sales, underreporting of sales to taxing entities and non-taxable retail sales, such as groceries and unprepared foods, and confidential and non-releasable data make comparisons data sources difficult.). When adjusted for Automobile Dealers, which are primarily concentrated in Escondido, the City’s sales account for approximately 36.1 percent of the City Trade Area’s annual sales.

When comparing the distribution of retail establishments, 58.6 percent of all retail establishments within the City Trade Area are located within the City of San Marcos. Based upon average sales per establishment, it is expected that the City would account for a higher percentage of overall City Trade Area sales. This lower percentage of sales capture could indicate weakness or underperformance in some establishments. The 2015 London Group report indicated a vacancy rate of 10.3 percent in retail properties. A healthy vacancy rate is typically under 7 percent. The weaker sales and higher vacancy rate indicate an underlying structural issue regarding retail sales performance within the City of San Marcos. More study is necessary in examining individual shopping centers and establishments to determine where underperformance is occurring to take appropriate corrective action that could include reconfiguration of tenants, shopping space design, or land use designations.



TRADE CAPTURE

This analysis contrasts demand for retail by store type (consumer expenditures) with available retail supply (retail sales) within the Creek SP Trade Area. The analysis determines how much of the current demand is being captured by retail establishments within the Creek SP Trade Area and how much is being spent outside of the trade area. The analysis is calculated based upon the following two assumptions regarding market capture:

1. The market could reach 100 percent equilibrium where all demand within the Creek SP Trade Area is captured by retail located within the trade area. This often requires additional destination retailers, attractions and work centers that would draw a significant amount of consumer spending from outside of the trade area.
2. Consumers are spending approximately 11 percent of expenditures on Non-Store Retailers. This category includes online and catalog sales. While these expenditures have grown year over year, they still constitute a fraction, albeit growing of overall retail sales.

These two assumptions will provide a range of potential additional demand, by store type, to indicate the viability for supporting additional retail growth.

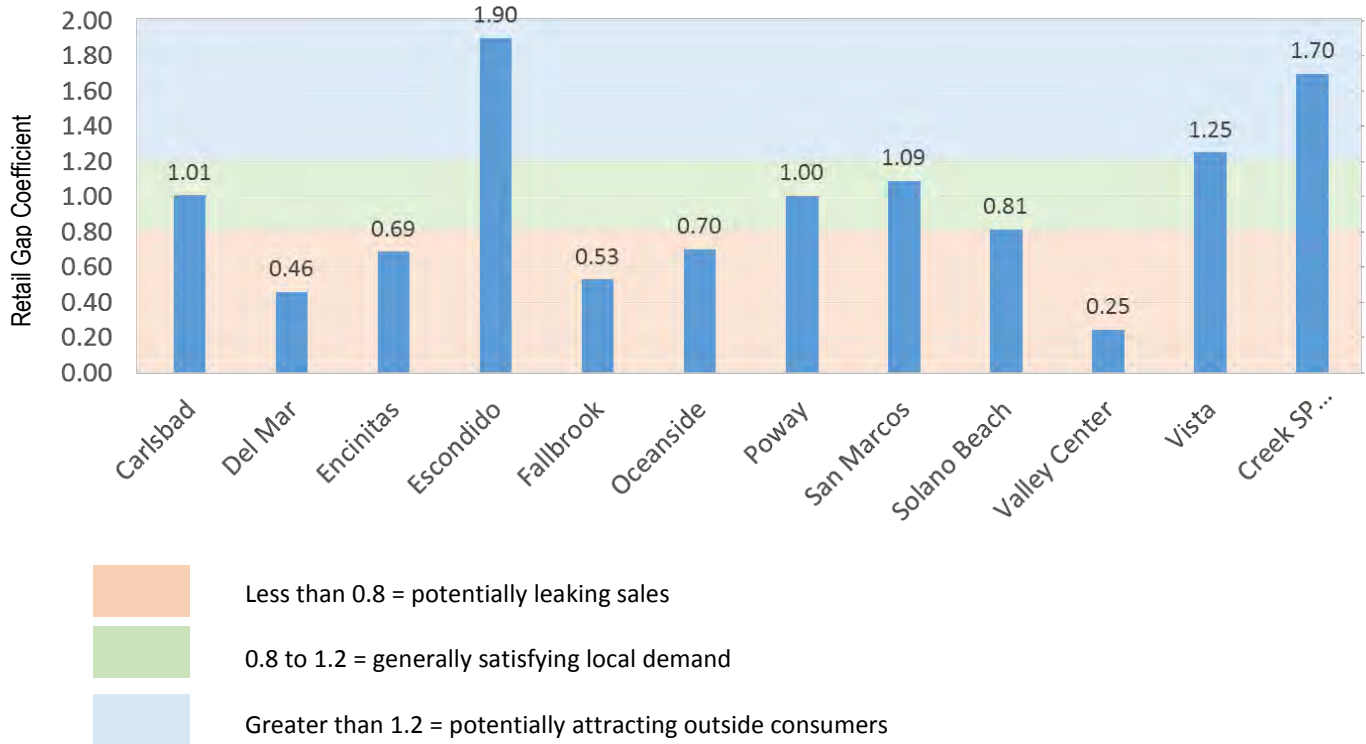
Analysis of overall supply and demand of the Creek SP Trade Area indicates that it is over performing, especially when compared by number of households and household income. The gap between supply and demand suggests an overall surplus of \$242.3 million which is additional sales from consumers from outside of the trade area making expenditures at establishments within the trade area. This discrepancy between supply and demand is measured by a retail gap coefficient of 1.7 which means a significant amount of sales are generated from consumers from outside of the trade area.

A retail trade area with a retail gap coefficient of between 0.8 and 1.2 is generally considered to be satisfying local demand. Retail trade areas with a factor above 1.2 are typically attracting a large amount of outside sales, known as a surplus, while areas with a factor below 0.8 are potentially leaking sales to other trade areas. As shown in Figure 17, the Creek SP Trade Area is currently performing at 1.7, which is significantly higher than most competing areas within North County except for Escondido. The locations of Restaurant Row, Furniture Row, and anchors Best Buy and Fry's contribute to this surplus. It is important to note there are still some leakages (where residents/consumers who live within the Creek SP Trade Area are spending outside of the trade area. This will be discussed under Trade Area Leakage.





Figure 17
Retail Trade Area Retail Gap Compared with Surrounding Market Areas



Source: ESRI, Michael Baker International

Retail Attractors/Strengths

While analysis of overall sales can indicate a high performing market, analyzing trade capture by store type will give the City better guidance on particular retail store types that the market within the Creek SP Trade Area can potentially support. It is important to look at where the Creek SP Trade Area is generating a surplus (where retail sales are exceeding consumer expenditures). A surplus indicates that these retail store types are attracting consumers from outside of the Creek SP Trade Area. Attractors are retail store types within a trade area that are the strongest performing in terms of satisfying local demand as well as attracting outside consumers. The possibilities for why these specific retail types have sales that are outpacing the demand for the area could include:

- Commuters who work in the area and shop in the Creek SP Trade Area because it is more convenient than the commercial areas where they reside.
- Tourists who visit and shop in the area.
- The agglomerative effect (strength in number of establishments) of a concentration of establishments such as Restaurants/Other Eating Places and Building Materials & Supply Dealers.

Table 6 shows the retail store types that generate surpluses and are considered attractors/strengths within the Creek SP Trade Area.



Table 6
Retail Attractors within the Creek SP Trade Area

Creek SP Trade Area			
NAICS Industry Summary	NAICS	Supply (Retail Sales)	Retail Coefficient
Furniture Stores	4421	\$50,914,370	8.93
Other Motor Vehicle Dealers	4412	\$47,163,394	5.40
Home Furnishings Stores	4422	\$22,832,750	4.88
Electronics & Appliance Stores	4430	\$85,263,691	4.81
Bldg Material & Supplies Dealers	4441	\$59,957,742	3.95
Other Miscellaneous Store Retailers	4539	\$34,504,601	3.73
Office Supplies, Stationery & Gift Stores	4532	\$8,617,588	3.42
Lawn & Garden Equip & Supply Stores	4442	\$4,162,085	3.26
Florists	4531	\$1,681,596	3.12
Sporting Goods/Hobby/Musical Instr Stores	4511	\$22,138,874	2.87
Restaurants/Other Eating Places	7225	\$86,015,622	2.74
Auto Parts, Accessories & Tire Stores	4413	\$10,073,909	2.15
Grocery Stores	4451	\$68,534,556	1.52
Beer, Wine & Liquor Stores	4453	\$4,459,932	1.32

Source: ESRI, Michael Baker International

These store types are already satisfying local demand but also attracting consumers from outside of the Creek SP Trade Area. Attracting more establishments may increase the size and pull of the trade area and further expand market penetration. The San Marcos Creek Specific Plan currently calls for mixed-use land uses with retail occupying the first floor configured in a “Main Street” configuration. Based upon these building archetypes, certain uses are more conducive to this type of development based upon store size ranges and non-reliance on automobile orientation including:

- Furniture Stores (NAICS 4421)
- Home Furnishing Stores (NAICS 4422)
- Electronics & Appliance Stores (NAICS 4430)
- Other Miscellaneous Store Retailers (NAICS 4539)
- Florists (NAICS 5351)
- Sporting Goods/Hobby/Musical Instrument Stores (NAICS 4511)
- Restaurants/Other Eating Places (NAICS 7225)
- Beer, Wine & Liquor Stores (NAICS 4453)

A full industry description and economic outlook is included in “Store Types for Potential Growth”.

Trade Area Leakage

The leakage analysis by retail store type shows the leakage gap between supply and demand. Leakage indicates how much consumer expenditures are made outside of the Creek SP Trade Area. It is important to note that in some retail store types, especially those that lend themselves to online sales, it is difficult to capture 100



percent of local demand. An example is the growing amount of E-commerce. According to recent U.S. Department of Commerce analysis, E-commerce sales continue to grow at an annual rate between 14 to 17 percent according to trends over the last five years. E-commerce accounted for 7.3 percent of total retail sales in 2015 which is an increase of almost 1.0 percent from 2014. In 2014, E-commerce accounted for 60.4 percent of the total retail growth in the economy. This trend is expected to continue as websites continue to offer more interactivity and the ability to sell more goods that were typically the domain of the brick and mortar store. Even with E-commerce sales, there is a place for brick and mortar stores, as they continue to account for a predominant amount of overall retail sales. Leakages in the Creek SP Trade Area present an opportunity for growth and introduction of additional establishments to help satisfy local demand. The gap analysis analyzes these leakages by store type to determine if the unmet demand can support additional establishments. Calculations of potential trade capture factor in Non-Store Retail Sales share including e-commerce.

Figure 18 and Figure 19 analyze the demand, supply and estimated leakage for each retail store type. The Retail gap coefficient measures how closely the individual retail store type is meeting local demand. Figure 18 identifies those industries that are not meeting local demand (retail gap coefficient of less than 0.8) or are closer to meeting local demand, but may still have substantial leakage in total dollars and should continue to be considered for further analysis. Many industries formerly identified as retail store types for top consumer expenditures and top retail sales also are not meeting local demand. Areas where the unmet demand gaps were highest, based upon a low retail gap coefficient (below 0.3), include:

- Shoe Stores (NAICS 4482)
- Automobile Dealers (NAICS 4411)
- Other General Merchandise Stores (NAICS 4529)
- Clothing Stores (NAICS 4481)
- Department Stores (NAICS 4521)
- Jewelry, Luggage & Leather Goods Stores (NAICS 4483)
- Books, Periodicals & Music Stores (NAICS 4512)
- Drinking Places – Alcoholic Beverages (NAICS 7224)
- Specialty Food Stores (NAICS 4452)

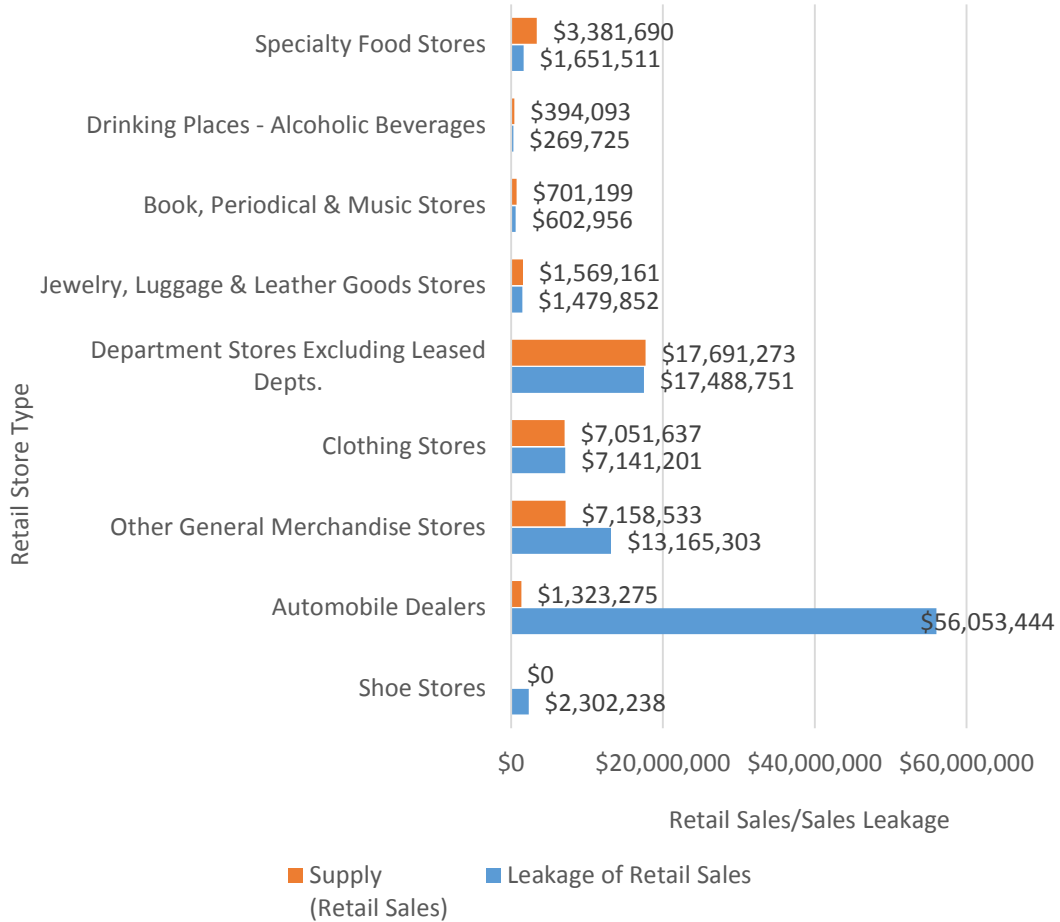
A full industry description and economic outlook is included in “Store Types for Potential Growth”.

It is important to note that just because these retail store types do not currently satisfy local demand, which does not mean that the Creek SP Trade Area can support additional establishments. The next section will analyze square feet of retail space demanded for each store type to help provide guidelines on additional space demanded and whether additional establishments can be supported.





Figure 18
Potential Retail Leakage within the Creek SP Trade Area by Retail Store Type

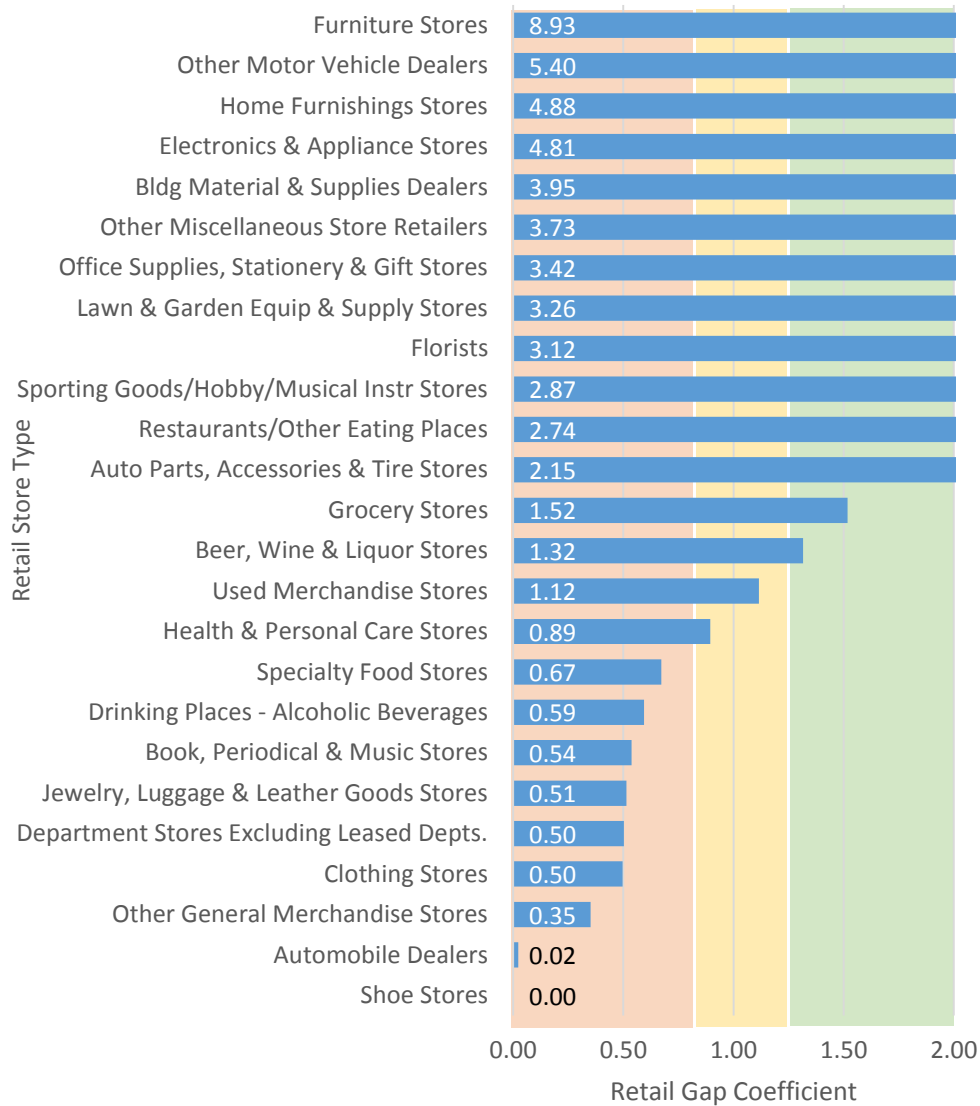


Source: ESRI





Figure 19
Retail Gap Coefficient within Creek SP Trade Area by Retail Store Type



- Less than 0.8 = Potentially leaking sales
- 0.8 to 1.2 = Generally satisfying local demand
- Greater than 1.2 = Potentially attracting outside consumers

Source: ESRI, Michael Baker International



EXISTING CONDITIONS RETAIL GROWTH POTENTIAL

While leakage by retail store type has been identified, additional analysis was conducted to determine the overall carrying capacity of the Creek SP Trade Area to support additional establishments. This analysis was accomplished by analyzing average establishment size, average sales by establishment, and average sales per square foot (SQFT) for each retail store type exhibiting a leakage. As mentioned previously, there is major variation of sales for individual store brands within each retail store type. While the “Additional Establishments Supported” is a guide based upon average retail store type size, there is considerable range in most retail store type categories and therefore more emphasis should be placed upon additional SQFT supported. Table 7 provides the analysis of additional retail growth potential for retail store types that may support additional retail establishments within the Creek SP Trade Area. Based upon existing conditions, the Creek SP Trade Area can support approximately 117,000 SQFT of additional retail.

Table 7
Additional Retail Growth Potential for Retail Trade Area by Retail Store Type

NAICS Industry Summary	NAICS	Creek SP Trade Area			
		Supply (Retail Sales)	Retail Coefficient	Additional SQFT Supported	Additional Establishments Supported
Shoe Stores	4482	\$0	0.00	6,420	0.8
Automobile Dealers	4411	\$1,323,275	0.02	0	1.3
Other General Merchandise Stores	4529	\$7,158,533	0.35	33,193	2.6
Clothing Stores	4481	\$7,051,637	0.50	19,377	3.0
Department Stores Excluding Leased Depts.	4521	\$17,691,273	0.50	50,536	0.5
Jewelry, Luggage & Leather Goods Stores	4483	\$1,569,161	0.51	1,497	0.4
Book, Periodical & Music Stores	4512	\$701,199	0.54	2,181	0.1
Drinking Places - Alcoholic Beverages	7224	\$394,093	0.59	151	0.0
Specialty Food Stores	4452	\$3,381,690	0.67	2,136	0.2

Source: ESRI, Michael Baker International

It is important to note that this may not be additional built space as current vacancies could absorb some of this retail space demand. In addition, projects on the periphery and adjacent to the Creek SP Trade Area boundaries may expand their retail gravitational pull which would shrink the existing Creek SP Trade Area and further reduce its existing market share. Current development within the University District could have an impact on future retail demand within the Creek SP Trade Area.

The San Marcos Creek Specific Plan currently calls for mixed-use land uses with retail occupying the first floor configured in a “Main Street” configuration. Based upon these building archetypes certain uses are more conducive to this type of development based upon store size ranges and non-reliance on automobile orientation including:

- Shoe Stores (NAICS 4482)
- Clothing Stores (NAICS 4481)
- Jewelry, Luggage and Leather Goods Stores (NAICS 4483)
- Books, Periodicals and Music Stores (NAICS 4512)





- Drinking Places – Alcoholic Beverages (NAICS 7224)
- Specialty Food Stores (NAICS 4452)

FUTURE DEVELOPMENT SCENARIOS RETAIL GROWTH POTENTIAL

The San Marcos Creek Specific Plan envisions a mixed-use neighborhood that will support residential, office and retail development. If implemented this will result in additional residential development within the Creek SP Trade Area thus increasing the number of households, and hence, the overall demand for retail within the trade area. Growth scenarios were examined based upon total potential build-outs to determine the potential additional retail that could be supported based upon these scenarios.

Scenario Methodology

The scenarios were based upon the probable maximum number of units that could be supported within the San Marcos Creek Specific Plan area. As the current specific plan is being revised, two scenarios were utilized as potential build-out scenarios. Total population was then calculated for each scenario based upon the average City Trade Area household size of 3.07 persons per household. This assumes a more diverse demographic than currently found in the Creek SP Trade Area and the likely consumer base for these additional units. The analysis also assumed a normal 6 percent vacancy rate in dwelling units which represents a normal amount of churn in the marketplace (people moving in and out of units with temporary vacancies during these transition periods).

Finally, additional retail demand was calculated based upon the overall per-capita demand, by retail store type, of the City Trade Area, which assumes that new residents will represent the more diverse demographic of the City Trade Area than the current demographic of the Creek SP Trade Area. The calculation for additional retail demand is represented in a range that includes a more conservative estimate if additional demand will only be captured in areas where retail leakages are already occurring, and a more liberal estimate if the Creek SP Trade Area will continue to attract consumers from outside of the trade area and demand will continue to increase in all retail store type categories.

Scenario Projections

Scenario 1 – 2,300 Additional Residential Dwelling Units

Scenario 1 would result in an additional increase in the Creek SP Trade Area population of 6,637 persons for a total trade area population of 34,458 persons. The change of population would result in a potential future demand (based upon full built-out) of approximately 200,000 to 221,000 of additional square feet of retail space.

Scenario 2 – 3,600 Additional Residential Dwelling Units

Scenario 2 would result in an additional increase in the Creek SP Trade Area population of 10,389 persons for a total trade area population of 38,210 persons. The change of population would result in a potential future demand (based upon full built-out) of approximately 276,000 to 401,000 of additional square feet of retail space.





STORE TYPES FOR POTENTIAL GROWTH / ECONOMIC OUTLOOK

Based upon the factors of compatibility with the San Marcos Creek Specific Plan vision, non-reliance on automobile orientation, identification as an attractor/strength, or a current leakage, the following retail store types provide potential opportunities for growth within the Creek SP Trade Area if additional growth from implementation of the plan is achieved:

NAICS 4482 Shoe Stores

Leakage: \$2,302,238

Potential Additional SQFT Supported: 6,400

Shoe Stores comprises establishments engaged in the retail sales of shoes and footwear. Examples include Foot Locker and DSW. This industry continues to face stiff competition from department stores and online retailers, with online sales becoming an ever-increasing threat. Sales are strongly tied to consumer spending which continues to increase. The industry is also seeing growth due to an increase in outdoor activities and sports which is driving increased demand. Product differentiation and highly trafficked areas will be key to shoe retailers success.

NAICS 4481 Clothing Stores

Leakage \$7,141,201

Potential Additional SQFT Supported 19,400

Men's clothing stores comprise establishments primarily engaged in retailing a general line of new men's and boys' clothing. Examples of store types include Men's Wearhouse and Hollywood Suits. Women's clothing stores comprise establishments primarily engaged in retailing a general line of new women's, misses', and juniors' clothing, including maternity wear. Examples include Dress Barn and Lane Bryant. Children's and infants' clothing stores comprise establishments primarily engaged in retailing a general line of new children's and infants' clothing. An example is Babies R Us. Family clothing stores comprise establishments primarily engaged in retailing a general line of new clothing for men, women, and children, without specializing in sales for an individual gender or age group. Examples include H&M and Old Navy. Other clothing stores comprise establishments primarily engaged in retailing specialized lines of new clothing (except general lines of men's, women's, children's, infants', and family clothing). Trends in this industry favor off-price stores that offer fashion at affordable prices. Younger customers are prioritizing other purchases such as technology and travel over clothing. Overall sales have increased with the recovering economy and low unemployment, but online sales will moderate revenue gains and suppress growth.

NAICS 4483 Jewelry, Luggage and Leather Goods Stores

Leakage \$1,479,852

Potential Additional SQFT Supported: 1,500

This industry comprises establishments primarily engaged in retailing jewelry, watches, silverware, handbags and luggage. Also included are establishments retailing these new products in combination with engraving work and/or repair services. Examples include Jared, Michael Kors and Coach. With the continued economic recovery, sales of luxury items such as jewelry are rebounding. Rising disposable income is allowing consumers to indulge in luxury purchases in this category. Furthermore, growth in travel is fueling increased demand for luggage. These types of stores tend to locate near major shopping nodes including major shopping centers and fashion centers.





NAICS 4512 Books, Periodicals and Music Stores

Leakage \$602,956

Potential Additional SQFT Supported: 2,200

Companies in this industry primarily retail a broad range of books, newspapers, periodicals, CDs, records and video such as DVDs and Blu-ray. The book store industry is expected to remain in decline as readers continue to shop online due to lower prices and e-books. Sustained shifts in consumer preferences towards digital content and streaming and volume discounting from larger music retailers and big box stores have hampered music store growth. Although increases in disposable income will improve sales, sustained momentum will continue to erode sales.

NAICS 7224 Drinking Places – Alcoholic Beverages

Leakage \$269,700

Potential Additional SQFT Supported: 150

This industry is comprised of bars, taverns, pubs, lounges, nightclubs, wine bars and other drinking places that primarily serve alcoholic beverages for immediate consumption. These establishments may also provide limited food service but it does not represent a majority of sales. The overall industry has continued to perform well over the past five years as overall consumer spending has increased. Consumer drinking patterns have also changed leading to more diverse establishments and specialization. Younger consumers increasingly look for craft beers, ciders, specialty cocktails and wines. Increased competition from full-service restaurants and at-home consumption will temper sales.

NAICS 445200 Specialty Food Stores

Leakage \$1,651,511

Potential Additional SQFT Supported: 2,100

This industry comprises establishments primarily engaged in retailing miscellaneous specialty foods not for immediate consumption and not made on the premises. Examples include butchers, bakeries, and specialty item stores (e.g., olive oil stores, spice stores, etc.). High disposable incomes drive industry growth. As the “foodie” trend continues, more consumers will seek out specialty items. Adaptation from larger supermarkets and natural food stores is increasing competitive pressure on the industry although steady and slow expansion is predicted over the next 5 years.

NAICS 442100 Furniture Stores

Surplus \$45,214,733

Potential Additional SQFT Supported: Industry captures sales from outside of the trade area but is considered a current consumer attractor so additional establishments could potentially be supported by the current agglomerative strength of the market area.

This industry is composed of retailers that sell a range of home furnishings goods including curtains, draperies, blinds, kitchenware, outdoor furniture, home and personal care appliances, floor coverings and decorative accessories. Revenue is expected to rise as increasing disposable income and a strong housing market encourage consumers to spend on these products. While competition from online sales will increase, the industry is expected to grow over the next 5 years.

NAICS 4422 Home Furnishing Stores

Surplus \$18,156,795

Potential Additional SQFT Supported: Industry captures sales from outside of the trade area but is considered a current consumer attractor so additional establishments could potentially be supported by the current agglomerative strength of the market area.





This industry comprises establishments primarily engaged in retailing new furniture, such as household furniture (e.g., baby furniture, box springs, and mattresses) and outdoor furniture; office furniture (except those sold in combination with office supplies and equipment); and/or furniture sold in combination with major appliances, home electronics, home furnishings, or floor coverings. Disposable income and rates of homeownership are major growth drivers for this industry. The improving economy coupled with high disposable income and high homeownership rates will increase local consumer demand. There are low barriers to entry and many opportunities for successful local businesses in addition to national chains.

NAICS 4431 Electronics and Appliances Stores

Surplus \$67,541,743

Potential Additional SQFT Supported: Industry captures sales from outside of the trade area but is considered a current consumer attractor so additional establishments could potentially be supported by the current agglomerative strength of the market area.

This industry comprises (1) establishments known as consumer electronics stores primarily engaged in retailing a general line of new consumer-type electronic products such as televisions, computers, and cameras; (2) establishments specializing in retailing a single line of consumer-type electronic products; (3) establishments primarily engaged in retailing these new electronic products in combination with repair and support services; and/or (4) establishments primarily engaged in retailing new prepackaged computer software. This is an extremely diverse category that includes big box retailers such as Best Buy, with an average store size of 35,000 – 45,000 square feet to smaller retailers such as GameStop, local photography stores and cell phone stores with much smaller store footprints of 1,500 to 3,000 square feet. While sales slowed substantially during the recession, growth is fueled by consumer sentiment. Increasing economic confidence has led to a rebound, although it has been slowed by heavy competition from E-commerce sites. Some store brands such as GameStop are attempting to reinvent their store to avoid the fate of DVD/VHS rental stores like Blockbuster as online gaming portals become more popular. Retailers are also competing with and/or teaming with E-commerce sites. Best Buy now sells through eBay in addition to its own online site.

NAICS 4539 Other Miscellaneous Store Retailers

Surplus \$25,253,063

Potential Additional SQFT Supported: Industry captures sales from outside of the trade area but is considered a current consumer attractor so additional establishments could potentially be supported by the current agglomerative strength of the market area.

This is a diverse retail sector that includes small retailers of specialized lines of goods such as pet stores, kitchenware, art supplies, tobacco products, etc. The economic recovery has boosted overall retail sales, but larger retailers such as department stores, warehouse clubs and internet sales have hit this particular sector hard. Consumers tend to focus on merchandise price points as a prime factor in purchasing in this category. Consumer trends in product demand also plays a role in store success. Smaller retailers have had difficulty competing against larger stores and online sales in this arena. Small store success will focus on targeting local niche markets. Pet stores have been a standout performer. The increase in consumer confidence, disposable income and popularity of pets (and trends towards more spending on pets) has accelerated revenues despite competition from grocery stores who often offer expanded pet supplies shelf space. Continued growth and expansion is expected in this industry especially for those offering premium products and services.

NAICS 5351 Florists

Surplus \$1,141,966

Potential Additional SQFT Supported: Industry captures sales from outside of the trade area but is considered a current consumer attractor so additional establishments could potentially be supported by the current agglomerative strength of the market area.





This industry cuts and arranges cut flowers and potted plants. The barrier to entry is low as there is very little capital investment as the industry is extremely labor intensive. While the economy is recovering and increased disposable income has led to recovering revenues, florists are experiencing greater competition from online sales and grocery stores. While online sales have traditionally depended upon local florists to satisfy online sales, the industry is switching to flower farms and wholesalers to fulfill online orders. This industry will continue to decline due to increased competition.

- Sporting Goods/Hobby/Musical Instrument Stores (NAICS 4511)

NAICS 4511 Sporting Goods/Hobby/Musical Instrument Stores

Surplus \$14,417,055

Potential Additional SQFT Supported: Industry captures sales from outside of the trade area but is considered a current consumer attractor so additional establishments could potentially be supported by the current agglomerative strength of the market area.

This industry is composed of Sporting Goods (primarily retail new goods including bicycles, camping equipment, exercise and fitness equipment, apparel, footwear and accessories), Hobby and Toy Stores (primarily retail dolls, toys, electronic toys and video games, board games, hobby kits and craft supplies), Fabric, Craft and Sewing Supplies Stores (primarily retail fabric, yarn, needlework accessories, decorations and sewing machines), and Musical Instrument and Supplies Stores (primarily retails musical instruments, sheet music, microphones, amplifiers and audio systems).

Sporting Goods - The economic recovery and increasing participation in sports and outdoor activities continues to drive increasing product demand. Even with online sales constraining growth, continued growth in this industry is expected as consumers continue to increase overall demand for products.

Hobby and Toy Stores – This industry has struggled to recover from the recession due to competition from department stores and online sales. Department stores now account for a majority of sales for hobby products and toys. Successful establishments will be able to offer hard-to-find, exclusive or specialized products and a knowledgeable workforce to provide a better customer experience.

Fabric, Craft and Sewing Supplies Stores – Even during the economic recovery, department stores and online sales have decreased overall market share. Increasing disposable income is driving overall growth though which may lead to an overall slow increase in demand and revenues. An increasing number of retirees is expected to also increase overall consumer demand for goods. Smaller retailers will need excellent customer service, good product presentation and nimbleness with product inventory to keep up with consumer trends.

Musical Instrument and Supplies Stores – The economic downturn and decrease in the number of adolescents (a primary market) has led to a downturn in overall revenue. Competition with department stores and warehouse clubs have also decreased market share for lower-end products. This is expected to stabilize as increasing disposable incomes will lead to a demand in higher-end instruments. Product presentation and a knowledgeable sales staff will be key to successful competition.

NAICS 722100 Restaurants/Other Eating Places

Surplus \$54,663,383

Potential Additional SQFT Supported: Industry captures sales from outside of the trade area but is considered a current consumer attractor so additional establishments could potentially be supported by the current agglomerative strength of the market area.





This industry comprises establishments primarily engaged in providing food services to patrons either through counter service or full-service seated restaurants. These establishments may provide this type of food service to patrons in combination with selling alcoholic beverages, offering carryout services, or presenting live nontheatrical entertainment. Within the industry, locally owned restaurants have experienced high growth, as barriers to entry are fairly low. The continued improvement in the economy have led to a recovery in sales and demand for future growth as disposable income grows. Limited-Service (NAICS 722200) establishments dubbed “fast casual” chains such as Pei Wei or Panera Bread have slowed demand for traditional full-service restaurants, especially during the recession and slow recovery. The growth rate for top chains exceeded 13.5 percent in 2014 and 11.6 percent in 2015. Forecasts for Limited Service Restaurants are expected to realize slower growth as labor markets tighten (often resulting in growth in real wage) and disposable income increases. As disposable income increases, consumer preferences tend to shift toward Full Service Restaurants.

NAICS 445300 Beer, Wine & Liquor Stores

Surplus \$1,070,924

Potential Additional SQFT Supported: Industry captures sales from outside of the trade area but is considered a current consumer attractor so additional establishments could potentially be supported by the current agglomerative strength of the market area.

This industry comprises establishments primarily engaged in retailing packaged alcoholic beverages, such as ale, beer, wine, and liquor. Larger stores compete on price and discounts while smaller stores specialize in specific merchandise niches.

CONCLUSIONS

Consumer Demand

- Creek SP Trade Area consumers generate an estimated \$347 million in annual consumer spending on retail goods and services.
- Consumers within the overall San Marcos City Trade Area generate an estimated \$3.65 billion in consumer expenditures.
- The Creek SP Trade Area constitutes approximately 9.5 percent of the overall City Trade Area consumer expenditures.
- In examining the top three quartiles of expenditures, over 16.5 percent of consumer spending by retail store type is at Automotive Dealers (NAICS 441100). This includes the purchase of new or used automobiles and services. Approximately 13.0 percent of consumer spending within the Creek SP Trade Area, over \$45.1 million annually, is spent in Grocery Stores (NAICS 445110) and 10.1 percent, \$35.2 million annually, is spent in Department Stores (NAICS 4521) . Restaurants/Other Eating Places (NAICS 7225) generates almost \$31.4 million annually which is 9.0 percent of annual expenditures.

Retail Supply

- Overall sales within the Creek SP Trade Area are \$589.5 million annually.
- Restaurants/Other Eating Places generate over \$86 million in retail sales within the Creek SP Trade Area. This was followed by Electronics & Appliance Stores (\$85.3 million), Grocery Stores (\$68.5 million), Building Material & Supplies Dealers (\$60.0 million) and Furniture Stores (\$50.9 million). These store types are also key components of the retail mix of the Creek SP Trade Area that includes





Restaurant Row, Furniture Row, and major electronics/appliance establishments including Fry's and Best Buy.

City of San Marcos Retail Performance

- Overall retail sales within the City of San Marcos account for 36.1 percent of the City Trade Area's sales (automobile sales not included), yet account for almost 59 percent of all retail establishments within the City Trade Area. This lower percentage of sales capture could indicate weakness or underperformance in some establishments.
- The 2015 London Group report indicated a retail vacancy rate of 10.3 percent. Healthy retail markets typically have vacancy rates below 7 percent. Recent CoStar real estate data from first-quarter 2017 reports that the vacancy rate in the San Marcos market is now 16.5 percent.

Creek SP Plan Trade Area Performance

- The Creek SP Trade Area is generating an overall surplus of \$242.3 million in sales which indicates it attracts a significant number of consumers from outside of the Trade Area. The locations of Restaurant Row, Furniture Row, and anchors such as Best Buy and Fry's contribute to this surplus.
- Store types that are strong performers and attracting consumers from outside of the Creek SP Trade Area include Furniture Stores, Home Furnishing Stores, Electronics & Appliance Stores, Other Miscellaneous Store Retailers, Florists, Sporting Goods/Hobby/Musical Instrument Stores, Restaurants/Other Eating Places and Beer/Wine/Liquor stores. Agglomerative economics indicate that the area could continue to grow these store types and capture more retail sales from competing retail trade areas.
- Several store types still result in a leakage of over \$56.2 million in potential lost sales in which residents of the Creek SP Trade Area are spending outside of the trade area. This shows potential unmet demand. These store types include Shoe Stores, Automobile Dealers, Other General Merchandise Stores, Clothing Stores, Department Stores, Jewelry/Luggage/Leather Goods Stores, Books/Periodicals/Music Stores, Drinking Places, and Specialty Food Stores.

Retail Expansion Opportunities and Retail Attraction Strategy Recommendations

- A leakage of \$56.2 million could result in an additional demand of almost 117,000 square feet of additional retail space. It is important to note that:
 - 100 percent retail capture is usually not possible for most retail trade areas with a similar retail mix to this Creek SP Trade Area. Furthermore, projects on the periphery and adjacent to the trade area boundaries may expand their retail pull which could further reduce the size of the Creek SP Trade Area and existing market share.
 - The amount of land available for new retail development is limited. Some development would require reconfiguration of currently developed land which would require initiation by landowners and the private sector. While this does occur, this is typically a long-term strategy. The loss of Redevelopment in 2011 makes it more difficult for the City to be a direct partner in these efforts.





- The San Marcos Creek Specific Plan calls for the development of additional residential and retail development. Based upon potential residential dwelling unit development scenarios, the population and retail demand would be expected to increase once built-out and occupied as the overall population of the Creek SP Trade Area will have increased.
 - 2,300 Dwelling Units Developed – This scenario would result in total demand of an additional 200,000 to 221,000 square feet of additional retail demand within the Creek SP Trade Area.
 - 3,600 Dwelling Units Developed – This scenario would result in an additional 276,000 to 401,000 square feet of additional retail demand within the Creek SP Trade Area.





CHAPTER 7.0 GENERAL TRENDS IN RETAIL SITE SELECTION

SITE SELECTION CRITERIA

Site selection is a process that retailers use to decide what markets to enter and what specific locations to choose for new stores. It can also have an impact on the future success or failure of a retail store. On average, ten sites are considered for every one that is chosen. This shows how much time and energy is invested in this process, and more importantly, shows cities looking to attract retailers that they need to understand what specific retailers are looking for in order to be competitive with surrounding markets.

Retailers today are using a combination of specialized site selection consultants and local real estate brokers to aid in the search for new locations. Site selection technology uses geographic information systems (GIS), proprietary data vendors, and available U.S. Census information to create demographic reports and maps, which can provide retailers with several key information categories that are part of almost all retailers' site selection criteria, such as:

- Traffic counts
- Consumer spending
- Households
- Median household income
- Total number of households and/or people
- Race/Ethnic composition
- Housing prices
- Competition

The types of information listed above give retailers a snapshot of a market quickly and allow them to search for the criteria they have identified as indicators for potential success for their specific retail type. This means that by the time a city is contacted by a broker or site selection consultant, retailers have already vetted most of the community's key statistics, with the community on a short-list of opportunity sites, and other competing sites have been eliminated. At this point, speed to market is critical, so a community must be prepared to provide any information that might be requested by the site selector. This likely includes much of the information in this retail market analysis, as well as general knowledge information about the retail climate of the area. Many retailers will conduct their own analysis as well, but letting them know how the City can and would like to help them is a great first step.

While many retailers have common site selection processes and criteria, most companies have also identified specific criteria that apply specifically to their stores. Criteria can differ between retailers within the same retail type. When a retailer identifies the locations they would like to focus on, they begin the more in-depth research process, which includes reaching out to cities to collect information. The City would benefit greatly from being prepared with the necessary information when this call comes in order to remain in the running for selection by the retailer. The information that cities must have on hand includes, but is not limited to:





- A list of the top available site locations, as well as backup locations
- Environmental issues or red flags for each site
- Available infrastructure and utilities
- Zoning/entitlement data
- Anecdotal information
- Incentives

Having this information can make or break the decision for the retailer. The City should stress the benefits of locating in the City, including the City's general flexibility, the quality of the market, and the productivity of the workforce. Tours by City staff to demonstrate their unique knowledge of the area, including anecdotal information that is not revealed by looking at numbers, can also be extremely beneficial to the site selection process.





CHAPTER 8.0 LAND USE AND ECONOMIC POLICY RECOMMENDATIONS

The following recommendations should be considered while updating the San Marcos Creek Specific Plan. These recommendations are not all policies that could be adopted through the update process, but include programs and strategies that organizations can also implement in partnership with the City.

1. **Diverse Consumer Base.** Diversification of market segments in the existing Creek SP Trade Area will be important in overall retail attraction. Attracting households with higher disposable incomes and variations in consumer preferences can result in a more diverse mix of retail opportunities.
2. **Take Advantage of Strengths and Plug Leakages.** Taking advantage of existing agglomeration economies will potentially increase the overall market capture of the Creek SP Trade Area and bring in more outside consumers to the trade area. This includes a focus on retail strengths such as Restaurants, Home Furnishings, and Sporting Goods/Hobby/Musical Instrument Stores, which have positive industry economic outlooks and establishment sizes that would be compatible with the vision for the San Marcos Creek Specific Plan. Current leakages also provide an opportunity to capture retail sales that are currently being made outside of the Creek SP Trade Area. These opportunities, when considering overall industry economic outlook, include Clothing Stores, Jewelry/Luggage/Leather Goods Stores, and Specialty Food Stores. Cycles and shifts in consumer preference will continue to drive a re-shaping of the retail industry. As the San Marcos Creek Specific Plan area develops overtime, consumer preferences for store types will continue to change and therefore a focus on the overall retail mix and not individual tenant store-types is important. Consumers are now placing more emphasis on the overall consumer experience which includes mixing entertainment and dining with retail shopping opportunities.
3. **Retail Attraction Strategy.** Creation of a comprehensive retail attraction campaign could aid retail recruitment efforts. The strengths of the existing Creek SP Trade Area and City Trade Area demographics can be marketed to show the Creek SP Trade Area will be positioned to support additional sales and establishments. The campaign can also include customized strategies for store types the City wishes to target to ensure the materials provide information important to site selection decisions of individual retailers. Attraction efforts should be focused on retail store types that show the greatest opportunities for expansion. In addition, oftentimes developers now plan an active role in recruiting local and unique retailers. Working with developers through the process will help develop a viable and successful retail mix.
4. **Engage Property Owners.** The San Marcos Creek Specific Plan area is highly parcelized, meaning land has been divided into smaller parcels owned by multiple owners. This makes development more complicated and costly and may serve as a barrier to implementation of the plan. The City should begin active dialogue with property owners to educate them on the vision of the San Marcos Creek Specific Plan, potential future benefits, and how to potentially become partners and benefit in future development.
5. **Solve Parcelization Through Partnership.** Solving parcelization and creating viable development areas could include the use of legal partnerships with local landowners. Local landowners could receive a share of a development agreement based upon their land ownership and thus receive a potential return on investment outside of an outright purchase at the beginning of a development project. This would present an equitable and lower risk option for property owners and lower capitalization costs on the outset for developers.





6. **Maximum Land Use Flexibility.** San Marcos Creek Specific Plan land use and zoning standards should provide for maximum flexibility of uses to account for the fact that requiring ground floor retail will force where developers to build more retail space than the market could potentially absorb. This would result in high vacancy rates and higher development costs. Options such as horizontal mixed-use, providing for flex space (residential first floor that could be converted to retail when the market demands), and live-work units can provide more flexibility and improve rates of return.
7. **Right-Size Parking.** Analyze the parking requirements of the San Marcos Creek Specific Plan to ensure retail parking requirements do not result in an “over-park” situation where more on-site parking is required than necessary which will significantly increase development costs. Maximizing on-street parking, shared parking, and standards that take into account reduced vehicle trips from pedestrian and bicycle travel should be utilized in developing these standards. Establishing a parking district could help aid the construction and maintenance of shared structured parking to alleviate potential supply issues.
8. **Businesses Must Be Visible.** Ensure that the location of retail space is highly visible to the automobile. Although one of the principles of the San Marcos Creek Specific Plan is to provide for a walkable neighborhood, visibility from vehicles is still a primary driver in retail location decisions and overall success of retail spaces. San Marcos Boulevard provides the most visibility for retail. For retail to penetrate deeper into the specific plan area, the attraction of a destination retailer to serve as an anchor is required to increase overall vehicle trips along the street that smaller retailers would be situated.
9. **Right-Size Retail.** The current San Marcos Creek Specific Plan requires more retail space than could be absorbed by the local market now and well into the future. The amount of retail should be reduced to account for existing and future demand based upon the actual number of additional households that will be added as a result of the specific plan implementation/development.
10. **Density Drives Development.** Density of residential development within the San Marcos Creek Specific Plan will drive the overall amount of retail space that could potentially be supported by the market. Higher density will result in more households, which will drive additional demand, and thus additional demand for square footage of retail space. Higher density will also result in increased use of modes of transportation outside of the automobile including walking and cycling. The higher the density, the more likely retail could be supported in areas of the development that may not receive as high of vehicle ADT as typically necessary to support retail due to a higher amount of cycling/pedestrian traffic along those same road segments.
11. **Explore Creative Financing.** Explore public-private partnership programs to assist small business such as the establishment of Business Improvement Districts and/or Enhanced Infrastructure Financing District to allow for revenue sharing and re-investment in existing retail areas to finance infrastructure improvements, parking, beautification and marketing programs. Explore the functions of a small business liaison to assist retail businesses to provide permit and regulatory compliance assistance and coordinate with the State and Federal Government for loan and grant programs including SBA loans, New Market Tax Credits and Infrastructure Bank loans. The liaison can be a City position, but can also be provided by partner organizations such as the Chamber of Commerce.
12. **Be a Piece of the Larger Growth Puzzle.** The San Marcos Specific Plan area must recognize it is part of a larger City development strategy that includes growth in the University District and the Retail Focus Area north of San Marcos Boulevard. Ensuring complementary growth will avoid direct competition and cannibalization of each trade areas market share which is a zero-sum game for the City as a whole. Synergies already exist with agglomerative retail such as Restaurant Row to grow retail





connections between the Retail Focus Area and the San Marcos Creek Specific Plan. Furthermore, potential weaknesses in current establishments/shopping centers within the City, shown by lower sales and higher vacancy rates, should be addressed. This could include upgrading and updating facades and existing strip retail facilities, developing more outlots from existing parking areas, or allowing for potential changes in land use to reflect changing spatial demands for retail. Considering development North of San Marcos Boulevard, in addition to the original Specific Plan area, could allow for a larger area for development, take advantage of existing anchors such as the movie theatre and restaurant row, and decrease immediate parcelization and flood plain issues that presently limit developable area within the Specific Plan area south of San Marcos Boulevard.

- 13. Explore Unique and Niche Development as Attractors.** Attracting a major destination retailer or unique development (i.e. Anaheim Packing House) could create an entirely different retail demand that will expand the overall market area and drive more consumers to the San Marcos Creek Specific Plan area. It is important to understand that most jurisdictions are also looking for these same “game changers” and competition is fierce for these retail anchors. As with previous recommendations, the specific plan should allow for maximum flexibility to account for this potential land use amongst other development scenarios. This area can also build upon the concentration of restaurants in the area known as “Restaurant Row” which creates an entertainment aspect to shopping which is becoming a key attractor for consumers.





CHAPTER 9.0 APPENDICES

APPENDIX A – STUDY ASSUMPTIONS

The following assumptions are made in conducting this analysis:

- Consumer expenditures within the trade area represent overall demand. While an excellent proxy, consumer expenditures for a specific sub-area are estimates (similar to sub-level Census data) and prone to some variability. Consumer expenditures also include spending on retail and food while traveling, commuting and shopping through mail-order and internet sites. Not all consumer expenditures will be captured within the analyzed retail trade areas.
- Visitors, workers and tourists spending within the Creek SP Trade Area are off-set by resident spending while working, visiting or traveling outside of the Creek SP Trade Area
- This analysis is static, while the retail market is a volatile and ever-changing sector of the economy. It is highly prone to changes in wages and employment as part of the typical business cycle and recessions as well as dynamic structural shifts in individual retail subsectors. For example, the Department Stores subsector is currently experiencing a decrease in revenues while the overall retail sector is improving. Market reports are indicating the subsector has not kept up with consumer preferences and shopping habits. Retail store types are constantly responding to changing consumer demands and habits. The continuing increase in online sales, the biggest threat to traditional retail stores, is also forcing changes by retailers and continuing to shift sales from “brick and mortar” locations. The rise of Amazon and other similar online retailers has led even traditional discount department stores like Walmart to shift their focus to online sales.
- Average establishment size and retail sales per square foot are uniform in a retail store type. While we utilize the most accurate and up to date sales forecasts, individual store brand sales per square foot may vary dramatically within an individual retail store type. For example, the retail sales per square foot in Clothing and Accessory store type category vary from store brand “Aeropostale” with average sales per square foot of \$471 and an average store size of 3,500 square feet to “The Gap” with an average sales per square foot of \$349 and an average store size of 8,700 square feet. Attracting specific store brands will require additional research on their sales and site selection requirements.





APPENDIX B – DATA SOURCES

U.S. CENSUS BUREAU

The U.S. Census Bureau and Economic Census provide demographic and economic statistics at multiple geographic levels. This information was used to compile the following statistics:

- Population projections
- Income
- Educational attainment/occupation
- Employment/occupation
- Unemployment
- Trade area mapping
- Housing tenure
- Age distribution/gender
- Race/ethnicity statistics
- Average sales per establishment statistic

ESRI

ESRI uses its Geographic Information Systems (GIS) mapping and data software to provide third party proprietary data. This information was used to compile the following statistics:

- Population projections
- Income
- Educational attainment/occupation
- Employment/occupation
- Trade area mapping
- Retail Sales
- housing tenure
- age distribution/gender
- race/ethnicity
- shopping center inventory
- Market segmentation
- Consumer Expenditures

BUREAU OF LABOR STATISTICS

The Bureau of Labor Statistics (BLS) of the U.S. Department of Labor is the principal Federal agency responsible for measuring labor market activity, working conditions, and price changes in the economy. The BLS is under the U.S. Department of Labor. This information was used to compile the following statistics:

- Income
- Unemployment

URBAN LAND INSTITUTE





The Urban Land Institute (ULI) is a nonprofit research and educational organization that publishes a Dollar and Cents of Shopping Centers guide, which gives information of retail establishment sizes and types. This information was used to compile the following statistics:

- Median establishment size
- Average sales per square foot

INTERNATIONAL COUNCIL OF SHOPPING CENTERS

The International Council of Shopping Centers (ICSC) is a global trade association dedicated to advancing the shopping center industry through education, data collection and distribution, professional certification programs and advocating to governmental bodies. This information was used to compile the following statistics:

- Median establishment size
- Average sales per square foot
- Site selection criteria

SOURCE INFORMATION FOR MEDIAN ESTABLISHMENT SIZE AND AVERAGE SALES PER SQUARE FOOT

Multiple sources were used to identify the median establishment size and average sales per square foot data, including HDL Companies, the Newspaper Association of America, ICSC yearly reports, and individual industry websites. Store type average sales per square foot are estimates and vary by individual store brands and chains. Chain sales typically yield higher sales per square foot and therefore were utilized over sales of small business establishments that typically yield lower sales per square foot. This assumption leads to a more conservative estimate of overall retail growth and support for additional establishments by store type.

IBISWorld

- Retail store type economic outlook





APPENDIX C – ESRI RETAIL MARKET DATA

San Marcos Creek Specific Plan Trade Area



Retail MarketPlace Profile

SPA_2_miles_shapefile
Area: 6.91 square miles

Prepared by Esri

Summary Demographics						
2016 Population						27,821
2016 Households						10,040
2016 Median Disposable Income						\$39,878
2016 Per Capita Income						\$22,548
Industry Summary	NAICS	Demand (Retail Potential)	Supply (Retail Sales)	Retail Gap	Leakage/Surplus Factor	Number of Businesses
Total Retail Trade and Food & Drink	44-45,722	\$347,281,108	\$589,539,739	-\$242,258,631	-25.9	381
Total Retail Trade	44-45	\$314,618,978	\$502,356,251	-\$187,737,273	-23.0	266
Total Food & Drink	722	\$32,662,130	\$87,183,487	-\$54,521,357	-45.5	115
Industry Group	NAICS	Demand (Retail Potential)	Supply (Retail Sales)	Retail Gap	Leakage/Surplus Factor	Number of Businesses
Motor Vehicle & Parts Dealers	441	\$70,804,749	\$58,560,579	\$12,244,170	9.5	22
Automobile Dealers	4411	\$57,376,719	\$1,323,275	\$56,053,444	95.5	1
Other Motor Vehicle Dealers	4412	\$8,737,162	\$47,163,394	-\$38,426,232	-68.7	7
Auto Parts, Accessories & Tire Stores	4413	\$4,690,868	\$10,073,909	-\$5,383,041	-36.5	14
Furniture & Home Furnishings Stores	442	\$10,375,592	\$73,747,120	-\$63,371,528	-75.3	38
Furniture Stores	4421	\$5,699,637	\$50,914,370	-\$45,214,733	-79.9	28
Home Furnishings Stores	4422	\$4,675,955	\$22,832,750	-\$18,156,795	-66.0	10
Electronics & Appliance Stores	443	\$17,721,948	\$85,263,691	-\$67,541,743	-65.6	22
Bldg Materials, Garden Equip. & Supply Stores	444	\$16,437,226	\$64,119,827	-\$47,682,601	-59.2	41
Bldg Material & Supplies Dealers	4441	\$15,160,347	\$59,957,742	-\$44,797,395	-59.6	36
Lawn & Garden Equip & Supply Stores	4442	\$1,276,879	\$4,162,085	-\$2,885,206	-53.0	5
Food & Beverage Stores	445	\$53,569,469	\$76,376,178	-\$22,806,709	-17.6	25
Grocery Stores	4451	\$45,147,260	\$68,534,556	-\$23,387,296	-20.6	14
Specialty Food Stores	4452	\$5,033,201	\$3,381,690	\$1,651,511	19.6	5
Beer, Wine & Liquor Stores	4453	\$3,389,008	\$4,459,932	-\$1,070,924	-13.6	6
Health & Personal Care Stores	446,4461	\$20,551,550	\$18,391,513	\$2,160,037	5.5	18
Gasoline Stations	447,4471	\$7,381,102	\$20,362,090	-\$2,980,988	-7.9	8
Clothing & Clothing Accessories Stores	448	\$19,544,089	\$8,704,916	\$10,839,173	38.4	15
Clothing Stores	4481	\$14,192,838	\$7,051,637	\$7,141,201	33.6	10
Shoe Stores	4482	\$2,302,238	\$0	\$2,302,238	100.0	0
Jewelry, Luggage & Leather Goods Stores	4483	\$3,049,013	\$1,569,161	\$1,479,852	32.0	5
Sporting Goods, Hobby, Book & Music Stores	451	\$9,025,974	\$22,840,073	-\$13,814,099	-43.4	18
Sporting Goods/Hobby/Musical Instr Stores	4511	\$7,721,819	\$22,138,874	-\$14,417,055	-48.3	16
Book, Periodical & Music Stores	4512	\$1,304,155	\$701,199	\$602,956	30.1	2
General Merchandise Stores	452	\$55,503,860	\$24,849,807	\$30,654,053	38.1	8
Department Stores Excluding Leased Depts.	4521	\$35,180,024	\$17,691,273	\$17,488,751	33.1	4
Other General Merchandise Stores	4529	\$20,323,836	\$7,158,533	\$13,165,303	47.9	4
Miscellaneous Store Retailers	453	\$13,380,574	\$45,995,454	-\$32,614,880	-54.9	48
Florists	4531	\$539,630	\$1,681,596	-\$1,141,966	-51.4	6
Office Supplies, Stationery & Gift Stores	4532	\$2,521,666	\$8,617,588	-\$6,095,922	-54.7	8
Used Merchandise Stores	4533	\$1,067,740	\$1,191,670	-\$123,930	-5.5	6
Other Miscellaneous Store Retailers	4539	\$9,251,538	\$34,504,601	-\$25,253,063	-57.7	28
Nonstore Retailers	454	\$10,322,845	\$3,145,004	\$7,177,841	53.3	3
Electronic Shopping & Mail-Order Houses	4541	\$8,537,891	\$906,427	\$7,631,464	80.8	1
Vending Machine Operators	4542	\$168,319	\$0	\$168,319	100.0	0
Direct Selling Establishments	4543	\$1,616,635	\$2,238,578	-\$621,943	-16.1	2
Food Services & Drinking Places	722	\$32,662,130	\$87,183,487	-\$54,521,357	-45.5	115
Special Food Services	7223	\$646,073	\$773,773	-\$127,700	-9.0	5
Drinking Places - Alcoholic Beverages	7224	\$663,818	\$394,093	\$269,725	25.5	1
Restaurants/Other Eating Places	7225	\$31,352,239	\$86,015,622	-\$54,663,383	-47	109

Data Note: Supply (retail sales) estimates sales to consumers by establishments. Sales to businesses are excluded. Demand (retail potential) estimates the expected amount spent by consumers at retail establishments. Supply and demand estimates are in current dollars. The Leakage/Surplus Factor presents a snapshot of retail opportunity. This is a measure of the relationship between supply and demand that ranges from +100 (total leakage) to -100 (total surplus). A positive value represents 'leakage' of retail opportunity outside the trade area. A negative value represents a surplus of retail sales, a market where customers are drawn in from outside the trade area. The Retail Gap represents the difference between Retail Potential and Retail Sales. Esri uses the North American Industry Classification System (NAICS) to classify businesses by their primary type of economic activity. Retail establishments are classified into 27 industry groups in the Retail Trade sector, as well as four industry groups within the Food Services & Drinking Establishments subsector. For more information on the Retail MarketPlace data, please click the link below to view the Methodology Statement. http://www.esri.com/data/esri_data/methodology-statements

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March 17, 2017





San Marcos City Trade Area



Retail MarketPlace Profile

SM_7_miles_shapefile
Area: 82.95 square miles

Prepared by Esri

Summary Demographics						
2016 Population						266,634
2016 Households						86,473
2016 Median Disposable Income						\$48,833
2016 Per Capita Income						\$26,832
Industry Summary	NAICS	Demand (Retail Potential)	Supply (Retail Sales)	Retail Gap	Leakage/Surplus Factor	Number of Businesses
Total Retail Trade and Food & Drink	44-45,722	\$3,651,497,728	\$5,249,141,773	-\$1,597,644,045	-17.9	2,262
Total Retail Trade	44-45	\$3,302,990,557	\$4,864,338,824	-\$1,561,348,267	-19.1	1,663
Total Food & Drink	722	\$348,507,171	\$384,802,949	-\$36,295,778	-4.9	598
Industry Group	NAICS	Demand (Retail Potential)	Supply (Retail Sales)	Retail Gap	Leakage/Surplus Factor	Number of Businesses
Motor Vehicle & Parts Dealers	441	\$745,565,274	\$1,830,378,402	-\$1,084,813,128	-42.1	244
Automobile Dealers	4411	\$603,847,327	\$1,556,521,825	-\$952,674,498	-44.1	93
Other Motor Vehicle Dealers	4412	\$92,579,479	\$193,352,276	-\$100,772,797	-35.2	50
Auto Parts, Accessories & Tire Stores	4413	\$49,138,467	\$80,504,301	-\$31,365,834	-24.2	101
Furniture & Home Furnishings Stores	442	\$110,535,700	\$177,227,015	-\$66,691,315	-23.2	116
Furniture Stores	4421	\$61,007,758	\$94,571,781	-\$33,564,023	-21.6	56
Home Furnishings Stores	4422	\$49,527,942	\$82,655,234	-\$33,127,292	-25.1	60
Electronics & Appliance Stores	443	\$188,945,635	\$277,004,549	-\$88,058,914	-18.9	136
Bldg Materials, Garden Equip. & Supply Stores	444	\$174,868,206	\$418,625,452	-\$243,757,246	-41.1	245
Bldg Material & Supplies Dealers	4441	\$161,783,093	\$361,176,294	-\$199,393,201	-38.1	192
Lawn & Garden Equip & Supply Stores	4442	\$13,085,113	\$57,449,158	-\$44,364,045	-62.9	53
Food & Beverage Stores	445	\$556,119,587	\$658,704,788	-\$102,585,201	-8.4	179
Grocery Stores	4451	\$468,316,697	\$566,680,765	-\$98,364,068	-9.5	98
Specialty Food Stores	4452	\$52,260,788	\$64,462,851	-\$12,202,063	-10.5	49
Beer, Wine & Liquor Stores	4453	\$35,542,102	\$27,561,171	\$7,980,931	12.6	32
Health & Personal Care Stores	446,4461	\$208,280,976	\$159,122,391	\$49,158,585	13.4	108
Gasoline Stations	447,4471	\$180,729,911	\$132,012,752	\$48,717,159	15.6	53
Clothing & Clothing Accessories Stores	448	\$209,427,176	\$114,551,971	\$94,875,205	29.3	127
Clothing Stores	4481	\$151,601,844	\$88,540,007	\$63,061,837	26.3	87
Shoe Stores	4482	\$24,926,167	\$14,128,243	\$10,797,924	27.6	14
Jewelry, Luggage & Leather Goods Stores	4483	\$32,899,166	\$11,883,722	\$21,015,444	46.9	26
Sporting Goods, Hobby, Book & Music Stores	451	\$96,484,069	\$157,567,466	-\$61,083,397	-24.0	135
Sporting Goods/Hobby/Musical Instr Stores	4511	\$82,540,243	\$131,017,335	-\$48,477,092	-22.7	112
Book, Periodical & Music Stores	4512	\$13,943,826	\$26,550,131	-\$12,606,305	-31.1	23
General Merchandise Stores	452	\$583,344,981	\$649,641,144	-\$66,296,163	-5.4	49
Department Stores Excluding Leased Depts.	4521	\$371,609,312	\$326,159,511	\$45,449,801	6.5	23
Other General Merchandise Stores	4529	\$211,735,669	\$323,481,633	-\$111,745,964	-20.9	25
Miscellaneous Store Retailers	453	\$139,025,199	\$223,566,502	-\$84,541,303	-23.3	240
Florists	4531	\$5,545,121	\$13,760,036	-\$8,214,915	-42.6	32
Office Supplies, Stationery & Gift Stores	4532	\$26,532,109	\$44,750,261	-\$18,218,152	-25.6	42
Used Merchandise Stores	4533	\$11,342,153	\$10,955,542	\$386,611	1.7	31
Other Miscellaneous Store Retailers	4539	\$95,605,816	\$154,100,663	-\$58,494,847	-23.4	135
Nonstore Retailers	454	\$109,663,844	\$65,936,392	\$43,727,452	24.9	32
Electronic Shopping & Mail-Order Houses	4541	\$90,399,176	\$37,338,467	\$53,060,709	41.5	15
Vending Machine Operators	4542	\$1,749,790	\$13,660,326	-\$11,910,536	-77.3	4
Direct Selling Establishments	4543	\$17,514,877	\$14,937,599	\$2,577,278	7.9	13
Food Services & Drinking Places	722	\$348,507,171	\$384,802,949	-\$36,295,778	-4.9	598
Special Food Services	7223	\$7,205,082	\$4,493,608	\$2,711,474	23.2	23
Drinking Places - Alcoholic Beverages	7224	\$7,152,770	\$3,319,971	\$3,832,799	36.6	10
Restaurants/Other Eating Places	7225	\$334,149,319	\$376,989,371	-\$42,840,052	-6	566

Data Note: Supply (retail sales) estimates sales to consumers by establishments. Sales to businesses are excluded. Demand (retail potential) estimates the expected amount spent by consumers at retail establishments. Supply and demand estimates are in current dollars. The Leakage/Surplus Factor presents a snapshot of retail opportunity. This is a measure of the relationship between supply and demand that ranges from +100 (total leakage) to -100 (total surplus). A positive value represents 'leakage' of retail opportunity outside the trade area. A negative value represents a surplus of retail sales, a market where customers are drawn in from outside the trade area. The Retail Gap represents the difference between Retail Potential and Retail Sales. Esri uses the North American Industry Classification System (NAICS) to classify businesses by their primary type of economic activity. Retail establishments are classified into 27 industry groups in the Retail Trade sector, as well as four industry groups within the Food Services & Drinking Establishments subsector. For more information on the Retail MarketPlace data, please click the link below to view the Methodology Statement. http://www.esri.com/data/esri_data/methodology-statements

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March 17, 2017





City of San Marcos (Jurisdictional Boundary)



Retail MarketPlace Profile

San Marcos City, CA
San Marcos City, CA (0668196)
Geography: Place

Prepared by Esri

Summary Demographics

2016 Population	92,547
2016 Households	29,473
2016 Median Disposable Income	\$49,974
2016 Per Capita Income	\$27,070

Industry Summary	NAICS	Demand (Retail Potential)	Supply (Retail Sales)	Retail Gap	Leakage/Surplus Factor	Number of Businesses
Total Retail Trade and Food & Drink	44-	\$1,278,898,684	\$1,394,563,743	-\$115,665,059	-4.3	703
Total Retail Trade	44-45	\$1,156,989,293	\$1,249,303,358	-\$92,314,065	-3.8	491
Total Food & Drink	722	\$121,909,391	\$145,260,385	-\$23,350,994	-8.7	212

Industry Group	NAICS	Demand (Retail Potential)	Supply (Retail Sales)	Retail Gap	Leakage/Surplus Factor	Number of Businesses
Motor Vehicle & Parts Dealers	441	\$264,348,101	\$128,796,438	\$135,551,663	34.5	46
Automobile Dealers	4411	\$214,011,597	\$2,259,485	\$211,752,112	97.9	2
Other Motor Vehicle Dealers	4412	\$33,172,191	\$110,052,949	-\$76,880,758	-53.7	18
Auto Parts, Accessories & Tire Stores	4413	\$17,164,313	\$16,484,004	\$680,309	2.0	26
Furniture & Home Furnishings Stores	442	\$38,924,540	\$90,313,573	-\$51,389,033	-39.8	55
Furniture Stores	4421	\$21,358,227	\$55,282,603	-\$33,924,376	-44.3	32
Home Furnishings Stores	4422	\$17,566,313	\$35,030,970	-\$17,464,657	-33.2	23
Electronics & Appliance Stores	443	\$66,383,158	\$119,020,310	-\$52,637,152	-28.4	39
Bldg Materials, Garden Equip. & Supply Stores	444	\$62,185,987	\$99,461,575	-\$37,275,588	-23.1	75
Bldg Material & Supplies Dealers	4441	\$57,446,416	\$81,506,841	-\$24,060,425	-17.3	59
Lawn & Garden Equip & Supply Stores	4442	\$4,739,571	\$17,954,734	-\$13,215,163	-58.2	16
Food & Beverage Stores	445	\$192,869,069	\$183,847,009	\$9,022,060	2.4	50
Grocery Stores	4451	\$162,547,325	\$169,459,396	-\$6,912,071	-2.1	27
Specialty Food Stores	4452	\$18,124,875	\$7,766,189	\$10,358,686	40.0	13
Beer, Wine & Liquor Stores	4453	\$12,196,869	\$6,621,424	\$5,575,445	29.6	10
Health & Personal Care Stores	446,4461	\$72,725,698	\$36,393,950	\$36,331,748	33.3	30
Gasoline Stations	447,4471	\$63,580,785	\$32,703,404	\$30,877,381	32.1	12
Clothing & Clothing Accessories Stores	448	\$72,591,485	\$15,091,631	\$57,499,854	65.6	27
Clothing Stores	4481	\$52,488,047	\$9,779,425	\$42,708,622	68.6	17
Shoe Stores	4482	\$9,615,483	\$2,569,399	\$6,046,084	54.1	4
Jewelry, Luggage & Leather Goods Stores	4483	\$11,487,955	\$2,742,807	\$8,745,148	61.5	6
Sporting Goods, Hobby, Book & Music Stores	451	\$33,537,534	\$51,897,099	-\$18,359,565	-21.5	45
Sporting Goods/Hobby/Musical Instr Stores	4511	\$28,688,936	\$50,138,274	-\$21,449,338	-27.2	40
Book, Periodical & Music Stores	4512	\$4,848,598	\$1,758,825	\$3,089,773	46.8	5
General Merchandise Stores	452	\$203,382,051	\$374,640,787	-\$171,258,736	-29.6	14
Department Stores Excluding Leased Depts.	4521	\$129,538,820	\$74,089,177	\$55,449,643	27.2	7
Other General Merchandise Stores	4529	\$73,843,231	\$300,551,610	-\$226,708,379	-60.6	7
Miscellaneous Store Retailers	453	\$48,881,683	\$93,437,818	-\$44,556,135	-31.3	90
Florists	4531	\$2,010,429	\$4,593,963	-\$2,583,534	-39.1	12
Office Supplies, Stationery & Gift Stores	4532	\$9,272,550	\$13,856,957	-\$4,584,407	-19.8	15
Used Merchandise Stores	4533	\$3,958,693	\$1,512,239	\$2,446,454	44.7	9
Other Miscellaneous Store Retailers	4539	\$33,640,011	\$73,474,659	-\$39,834,648	-37.2	54
Nonstore Retailers	454	\$37,579,202	\$23,699,764	\$13,879,438	22.6	8
Electronic Shopping & Mail-Order Houses	4541	\$31,610,632	\$4,451,427	\$27,159,205	75.3	1
Vending Machine Operators	4542	\$607,120	\$10,288,617	-\$9,681,497	-88.9	1
Direct Selling Establishments	4543	\$5,361,450	\$8,959,720	-\$3,598,270	-25.1	6
Food Services & Drinking Places	722	\$121,909,391	\$145,260,385	-\$23,350,994	-8.7	212
Special Food Services	7223	\$2,509,960	\$1,377,890	\$1,132,070	29.1	7
Drinking Places - Alcoholic Beverages	7224	\$2,474,414	\$1,923,997	\$550,417	12.5	6
Restaurants/Other Eating Places	7225	\$116,925,017	\$141,958,498	-\$25,033,481	-10	199

Data notes: Supply (retail sales) estimates sales to consumers by establishments. Sales to businesses are excluded. Demand (retail potential) estimates the expected amount spent by consumers at retail establishments. Supply and demand estimates are in current dollars. The Leakage/Surplus Factor presents a snapshot of retail opportunity. This is a measure of the relationship between supply and demand that ranges from +100 (total leakage) to -100 (total surplus). A positive value represents 'leakage' of retail opportunity outside the trade area. A negative value represents a surplus of retail sales, a market where customers are drawn in from outside the trade area. The Retail Gap represents the difference between Retail Potential and Retail Sales. Esri uses the North American Industry Classification System (NAICS) to classify businesses by their primary type of economic activity. Retail establishments are classified into 27 industry groups in the Retail Trade sector, as well as four industry groups within the Food Services & Drinking Establishments subsector. For more information on the Retail MarketPlace data, please click the link below to view the Methodology Statement.
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March 10, 2017





North County



Retail MarketPlace Profile

NorthCoBlob
Area: 887.84 square miles

Prepared by Esri

Summary Demographics

2016 Population	1,114,611
2016 Households	385,624
2016 Median Disposable Income	\$59,845
2016 Per Capita Income	\$37,071

Industry Summary	NAICS	Demand (Retail Potential)	Supply (Retail Sales)	Retail Gap	Leakage/Surplus Factor	Number of Businesses
Total Retail Trade and Food & Drink	44-45,722	\$20,890,818,807	\$16,100,543,943	\$4,790,274,864	12.9	8,352
Total Retail Trade	44-45	\$18,889,402,238	\$14,432,271,516	\$4,457,130,722	13.4	5,952
Total Food & Drink	722	\$2,001,416,570	\$1,668,272,427	\$333,144,143	9.1	2,400

Industry Group	NAICS	Demand (Retail Potential)	Supply (Retail Sales)	Retail Gap	Leakage/Surplus Factor	Number of Businesses
Motor Vehicle & Parts Dealers	441	\$4,267,107,721	\$3,447,843,363	\$819,264,358	10.6	527
Automobile Dealers	4411	\$3,451,731,880	\$2,872,905,627	\$578,826,253	9.2	180
Other Motor Vehicle Dealers	4412	\$532,850,639	\$384,441,346	\$148,409,293	16.2	118
Auto Parts, Accessories & Tire Stores	4413	\$282,525,201	\$190,496,389	\$92,028,812	19.5	229
Furniture & Home Furnishings Stores	442	\$640,944,479	\$377,276,168	\$263,668,311	25.9	310
Furniture Stores	4421	\$351,623,099	\$217,193,296	\$134,429,803	23.6	153
Home Furnishings Stores	4422	\$289,321,380	\$160,082,873	\$129,238,507	28.8	157
Electronics & Appliance Stores	443	\$1,089,633,196	\$1,108,471,421	-\$18,838,225	-0.9	558
Bldg Materials, Garden Equip. & Supply Stores	444	\$1,038,943,762	\$1,075,238,673	-\$36,294,911	-1.7	691
Bldg Material & Supplies Dealers	4441	\$960,584,607	\$843,578,464	\$117,006,143	6.5	517
Lawn & Garden Equip & Supply Stores	4442	\$78,359,154	\$231,660,210	-\$153,301,056	-49.4	174
Food & Beverage Stores	445	\$3,140,323,790	\$2,361,711,400	\$778,612,390	14.2	625
Grocery Stores	4451	\$2,641,590,477	\$2,089,651,945	\$551,938,532	11.7	325
Specialty Food Stores	4452	\$293,945,529	\$174,319,858	\$119,625,671	25.5	188
Beer, Wine & Liquor Stores	4453	\$204,787,785	\$97,739,598	\$107,048,187	35.4	112
Health & Personal Care Stores	446,4461	\$1,200,487,653	\$652,822,894	\$547,664,759	29.6	418
Gasoline Stations	447,4471	\$1,011,812,606	\$579,748,094	\$432,064,512	27.1	183
Clothing & Clothing Accessories Stores	448	\$1,201,049,133	\$720,475,472	\$480,573,661	25.0	807
Clothing Stores	4481	\$866,841,635	\$516,623,404	\$350,218,231	25.3	550
Shoe Stores	4482	\$140,506,138	\$105,015,645	\$35,490,493	14.5	105
Jewelry, Luggage & Leather Goods Stores	4483	\$193,701,360	\$98,836,422	\$94,864,938	32.4	152
Sporting Goods, Hobby, Book & Music Stores	451	\$550,928,479	\$563,861,607	-\$12,933,128	-1.2	524
Sporting Goods/Hobby/Musical Instr Stores	4511	\$470,896,375	\$501,126,439	-\$30,230,064	-3.1	453
Book, Periodical & Music Stores	4512	\$80,032,104	\$62,735,169	\$17,296,935	12.1	72
General Merchandise Stores	452	\$3,311,130,021	\$2,519,295,417	\$791,834,604	13.6	205
Department Stores Excluding Leased Depts.	4521	\$2,116,063,110	\$1,395,531,187	\$720,531,923	20.5	82
Other General Merchandise Stores	4529	\$1,195,066,910	\$1,123,764,231	\$71,302,679	3.1	123
Miscellaneous Store Retailers	453	\$797,903,972	\$758,281,720	\$39,622,252	2.5	962
Florists	4531	\$33,419,426	\$45,285,225	-\$11,865,799	-15.1	156
Office Supplies, Stationery & Gift Stores	4532	\$152,555,412	\$126,320,204	\$26,235,208	9.4	191
Used Merchandise Stores	4533	\$65,475,059	\$53,445,997	\$12,029,062	10.1	155
Other Miscellaneous Store Retailers	4539	\$546,454,075	\$533,230,294	\$13,223,781	1.2	460
Nonstore Retailers	454	\$639,137,426	\$267,245,286	\$371,892,140	41.0	141
Electronic Shopping & Mail-Order Houses	4541	\$520,373,573	\$186,408,167	\$333,965,406	47.3	81
Vending Machine Operators	4542	\$9,847,897	\$34,051,348	-\$24,203,451	-55.1	14
Direct Selling Establishments	4543	\$108,915,957	\$46,785,771	\$62,130,186	39.9	45
Food Services & Drinking Places	722	\$2,001,416,570	\$1,668,272,427	\$333,144,143	9.1	2,400
Special Food Services	7223	\$42,153,875	\$13,754,839	\$28,399,036	50.8	62
Drinking Places - Alcoholic Beverages	7224	\$41,649,318	\$21,987,661	\$19,661,657	30.9	58
Restaurants/Other Eating Places	7225	\$1,917,613,377	\$1,632,529,927	\$285,083,450	8	2,280

Data Note: Supply (retail sales) estimates sales to consumers by establishments. Sales to businesses are excluded. Demand (retail potential) estimates the expected amount spent by consumers at retail establishments. Supply and demand estimates are in current dollars. The Leakage/Surplus Factor presents a snapshot of retail opportunity. This is a measure of the relationship between supply and demand that ranges from +100 (total leakage) to -100 (total surplus). A positive value represents 'leakage' of retail opportunity outside the trade area. A negative value represents a surplus of retail sales, a market where customers are drawn in from outside the trade area. The Retail Gap represents the difference between Retail Potential and Retail Sales. Esri uses the North American Industry Classification System (NAICS) to classify businesses by their primary type of economic activity. Retail establishments are classified into 27 industry groups in the Retail Trade sector, as well as four industry groups within the Food Services & Drinking Establishments subsector. For more information on the Retail MarketPlace data, please click the link below to view the Methodology Statement. http://www.esri.com/data/esri_data/methodology-statements

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March 28, 2017



APPENDIX D – DEMOGRAPHIC DATA

San Marcos Creek SP Area





Community Profile

SPA_2_miles_shapefile
Area: 6.91 square miles

Prepared by Esri

Population Summary

2000 Total Population	22,127
2010 Total Population	26,037
2016 Total Population	27,821
2016 Group Quarters	144
2021 Total Population	29,574
2016-2021 Annual Rate	1.23%
2016 Total Daytime Population	34,579
Workers	17,483
Residents	17,096

Household Summary

2000 Households	8,145
2000 Average Household Size	2.71
2010 Households	9,559
2010 Average Household Size	2.71
2016 Households	10,040
2016 Average Household Size	2.76
2021 Households	10,631
2021 Average Household Size	2.77
2016-2021 Annual Rate	1.15%
2010 Families	6,304
2010 Average Family Size	3.28
2016 Families	6,620
2016 Average Family Size	3.34
2021 Families	7,013
2021 Average Family Size	3.35
2016-2021 Annual Rate	1.16%

Housing Unit Summary

2000 Housing Units	8,522
Owner Occupied Housing Units	60.9%
Renter Occupied Housing Units	34.7%
Vacant Housing Units	4.4%
2010 Housing Units	10,155
Owner Occupied Housing Units	55.3%
Renter Occupied Housing Units	38.9%
Vacant Housing Units	5.9%
2016 Housing Units	10,676
Owner Occupied Housing Units	53.2%
Renter Occupied Housing Units	40.8%
Vacant Housing Units	6.0%
2021 Housing Units	11,255
Owner Occupied Housing Units	53.0%
Renter Occupied Housing Units	41.5%
Vacant Housing Units	5.5%

Median Household Income

2016	\$45,951
2021	\$46,278

Median Home Value

2016	\$358,639
2021	\$443,466

Per Capita Income

2016	\$22,548
2021	\$24,089

Median Age

2010	36.0
2016	37.0
2021	38.4

Data Note: Household population includes persons not residing in group quarters. Average Household Size is the household population divided by total households. Persons in families include the householder and persons related to the householder by birth, marriage, or adoption. Per Capita Income represents the income received by all persons aged 15 years and over divided by the total population.

Source: U.S. Census Bureau, Census 2010 Summary File 1. Esri forecasts for 2016 and 2021 Esri converted Census 2000 data into 2010 geography.

March 17, 2017





Community Profile

SPA_2_miles_shapefile
Area: 6.91 square miles

Prepared by Esri

2016 Households by Income

Household Income Base	10,040
<\$15,000	12.3%
\$15,000 - \$24,999	12.2%
\$25,000 - \$34,999	11.0%
\$35,000 - \$49,999	18.4%
\$50,000 - \$74,999	18.4%
\$75,000 - \$99,999	10.4%
\$100,000 - \$149,999	9.8%
\$150,000 - \$199,999	4.2%
\$200,000+	3.4%
Average Household Income	\$65,088

2021 Households by Income

Household Income Base	10,631
<\$15,000	13.7%
\$15,000 - \$24,999	10.9%
\$25,000 - \$34,999	10.5%
\$35,000 - \$49,999	18.4%
\$50,000 - \$74,999	14.6%
\$75,000 - \$99,999	11.7%
\$100,000 - \$149,999	11.3%
\$150,000 - \$199,999	5.0%
\$200,000+	3.8%
Average Household Income	\$70,035

2016 Owner Occupied Housing Units by Value

Total	5,681
<\$50,000	8.5%
\$50,000 - \$99,999	11.9%
\$100,000 - \$149,999	3.8%
\$150,000 - \$199,999	7.1%
\$200,000 - \$249,999	4.2%
\$250,000 - \$299,999	4.6%
\$300,000 - \$399,999	16.8%
\$400,000 - \$499,999	13.9%
\$500,000 - \$749,999	24.5%
\$750,000 - \$999,999	3.8%
\$1,000,000 +	0.8%
Average Home Value	\$368,506

2021 Owner Occupied Housing Units by Value

Total	5,962
<\$50,000	7.2%
\$50,000 - \$99,999	11.0%
\$100,000 - \$149,999	3.2%
\$150,000 - \$199,999	5.0%
\$200,000 - \$249,999	1.9%
\$250,000 - \$299,999	1.8%
\$300,000 - \$399,999	10.8%
\$400,000 - \$499,999	21.0%
\$500,000 - \$749,999	31.6%
\$750,000 - \$999,999	5.4%
\$1,000,000 +	1.1%
Average Home Value	\$422,999

Data Note: Income represents the preceding year, expressed in current dollars. Household income includes wage and salary earnings, interest dividends, net rents, pensions, SSI and welfare payments, child support, and alimony.

Source: U.S. Census Bureau, Census 2010 Summary File 1. Esri forecasts for 2016 and 2021 Esri converted Census 2000 data into 2010 geography.

March 17, 2017





Community Profile

SPA_2_miles_shapefile
Area: 6.91 square miles

Prepared by Esri

2010 Population by Age	
Total	26,036
0 - 4	7.6%
5 - 9	7.2%
10 - 14	6.7%
15 - 24	13.7%
25 - 34	13.4%
35 - 44	13.6%
45 - 54	11.6%
55 - 64	9.3%
65 - 74	7.1%
75 - 84	6.1%
85 +	3.7%
18 +	74.3%
2016 Population by Age	
Total	27,822
0 - 4	7.1%
5 - 9	6.8%
10 - 14	6.6%
15 - 24	13.2%
25 - 34	13.6%
35 - 44	12.3%
45 - 54	11.4%
55 - 64	10.2%
65 - 74	8.5%
75 - 84	6.0%
85 +	4.1%
18 +	75.6%
2021 Population by Age	
Total	29,573
0 - 4	6.9%
5 - 9	6.4%
10 - 14	6.3%
15 - 24	12.2%
25 - 34	13.7%
35 - 44	12.5%
45 - 54	10.6%
55 - 64	10.7%
65 - 74	9.8%
75 - 84	6.7%
85 +	4.2%
18 +	76.7%
2010 Population by Sex	
Males	12,648
Females	13,389
2016 Population by Sex	
Males	13,542
Females	14,279
2021 Population by Sex	
Males	14,420
Females	15,154

Source: U.S. Census Bureau, Census 2010 Summary File 1. Esri forecasts for 2016 and 2021 Esri converted Census 2000 data into 2010 geography.

March 17, 2017





Community Profile

SPA_2_miles_shapefile
Area: 6.91 square miles

Prepared by Esri

2010 Population by Race/Ethnicity

Total	26,037
White Alone	61.2%
Black Alone	2.1%
American Indian Alone	0.7%
Asian Alone	6.0%
Pacific Islander Alone	0.3%
Some Other Race Alone	25.8%
Two or More Races	3.9%
Hispanic Origin	46.4%
Diversity Index	81.0

2016 Population by Race/Ethnicity

Total	27,821
White Alone	59.1%
Black Alone	2.1%
American Indian Alone	0.7%
Asian Alone	6.5%
Pacific Islander Alone	0.3%
Some Other Race Alone	27.2%
Two or More Races	4.2%
Hispanic Origin	48.8%
Diversity Index	82.3

2021 Population by Race/Ethnicity

Total	29,575
White Alone	57.6%
Black Alone	2.1%
American Indian Alone	0.7%
Asian Alone	6.9%
Pacific Islander Alone	0.3%
Some Other Race Alone	28.0%
Two or More Races	4.4%
Hispanic Origin	50.8%
Diversity Index	83.1

2010 Population by Relationship and Household Type

Total	26,037
In Households	99.5%
In Family Households	83.8%
Householder	23.2%
Spouse	17.1%
Child	31.7%
Other relative	7.4%
Nonrelative	4.4%
In Nonfamily Households	15.6%
In Group Quarters	0.5%
Institutionalized Population	0.4%
Noninstitutionalized Population	0.1%

Data Note: Persons of Hispanic Origin may be of any race. The Diversity Index measures the probability that two people from the same area will be from different race/ethnic groups.

Source: U.S. Census Bureau, Census 2010 Summary File 1. Esri forecasts for 2016 and 2021 Esri converted Census 2000 data into 2010 geography.

March 17, 2017





Community Profile

SPA_2_miles_shapefile
Area: 6.91 square miles

Prepared by Esri

2016 Population 25+ by Educational Attainment

Total	18,404
Less than 9th Grade	17.4%
9th - 12th Grade, No Diploma	7.5%
High School Graduate	19.0%
GED/Alternative Credential	1.4%
Some College, No Degree	16.2%
Associate Degree	13.5%
Bachelor's Degree	17.2%
Graduate/Professional Degree	7.8%

2016 Population 15+ by Marital Status

Total	22,083
Never Married	29.1%
Married	50.6%
Widowed	9.4%
Divorced	10.9%

2016 Civilian Population 16+ in Labor Force

Civilian Employed	95.2%
Civilian Unemployed	4.8%

2016 Employed Population 16+ by Industry

Total	10,843
Agriculture/Mining	5.8%
Construction	6.2%
Manufacturing	10.7%
Wholesale Trade	3.3%
Retail Trade	11.0%
Transportation/Utilities	3.1%
Information	1.6%
Finance/Insurance/Real Estate	6.7%
Services	49.1%
Public Administration	2.6%

2016 Employed Population 16+ by Occupation

Total	10,842
White Collar	50.3%
Management/Business/Financial	12.2%
Professional	16.7%
Sales	8.9%
Administrative Support	12.5%
Services	25.9%
Blue Collar	23.7%
Farming/Forestry/Fishing	4.7%
Construction/Extraction	5.0%
Installation/Maintenance/Repair	1.7%
Production	7.5%
Transportation/Material Moving	4.9%

2010 Population By Urban/ Rural Status

Total Population	26,037
Population Inside Urbanized Area	100.0%
Population Inside Urbanized Cluster	0.0%
Rural Population	0.0%

Source: U.S. Census Bureau, Census 2010 Summary File 1, Esri forecasts for 2016 and 2021 Esri converted Census 2000 data into 2010 geography.

March 17, 2017





Community Profile

SPA_2_miles_shapefile
Area: 6.91 square miles

Prepared by Esri

2010 Households by Type	
Total	9,559
Households with 1 Person	27.1%
Households with 2+ People	72.9%
Family Households	65.9%
Husband-wife Families	48.9%
With Related Children	25.0%
Other Family (No Spouse Present)	17.1%
Other Family with Male Householder	5.9%
With Related Children	3.6%
Other Family with Female Householder	11.2%
With Related Children	6.6%
Nonfamily Households	7.0%
All Households with Children	35.7%
Multigenerational Households	5.6%
Unmarried Partner Households	5.8%
Male-female	5.2%
Same-sex	0.6%
2010 Households by Size	
Total	9,559
1 Person Household	27.1%
2 Person Household	29.7%
3 Person Household	13.8%
4 Person Household	13.1%
5 Person Household	7.6%
6 Person Household	4.1%
7 + Person Household	4.6%
2010 Households by Tenure and Mortgage Status	
Total	9,559
Owner Occupied	58.7%
Owned with a Mortgage/Loan	38.1%
Owned Free and Clear	20.6%
Renter Occupied	41.3%
2010 Housing Units By Urban/ Rural Status	
Total Housing Units	10,155
Housing Units Inside Urbanized Area	100.0%
Housing Units Inside Urbanized Cluster	0.0%
Rural Housing Units	0.0%

Data Note: Households with children include any households with people under age 18, related or not. Multigenerational households are families with 3 or more parent-child relationships. Unmarried partner households are usually classified as nonfamily households unless there is another member of the household related to the householder. Multigenerational and unmarried partner households are reported only to the tract level, Esri estimated block group data, which is used to estimate polygons or non-standard geography.

Source: U.S. Census Bureau, Census 2010 Summary File 1. Esri forecasts for 2016 and 2021 Esri converted Census 2000 data into 2010 geography.

March 17, 2017





Community Profile

SPA_2_miles_shapefile
Area: 6.91 square miles

Prepared by Esri

Top 3 Tapestry Segments

1. Retirement Communities
2. NeWest Residents (13C)
3. The Elders (9C)

2016 Consumer Spending

Apparel & Services: Total \$	\$17,426,548
Average Spent	\$1,735.71
Spending Potential Index	86
Education: Total \$	\$11,485,406
Average Spent	\$1,143.96
Spending Potential Index	81
Entertainment/Recreation: Total \$	\$24,753,025
Average Spent	\$2,465.44
Spending Potential Index	85
Food at Home: Total \$	\$43,325,554
Average Spent	\$4,315.29
Spending Potential Index	87
Food Away from Home: Total \$	\$26,740,743
Average Spent	\$2,663.42
Spending Potential Index	86
Health Care: Total \$	\$44,998,192
Average Spent	\$4,481.89
Spending Potential Index	85
HH Furnishings & Equipment: Total \$	\$15,088,343
Average Spent	\$1,502.82
Spending Potential Index	85
Personal Care Products & Services: Total \$	\$6,487,048
Average Spent	\$646.12
Spending Potential Index	88
Shelter: Total \$	\$137,946,360
Average Spent	\$13,739.68
Spending Potential Index	88
Support Payments/Cash Contributions/Gifts in Kind: Total \$	\$20,039,377
Average Spent	\$1,995.95
Spending Potential Index	86
Travel: Total \$	\$15,811,109
Average Spent	\$1,574.81
Spending Potential Index	85
Vehicle Maintenance & Repairs: Total \$	\$8,845,040
Average Spent	\$880.98
Spending Potential Index	85

Data Note: Consumer spending shows the amount spent on a variety of goods and services by households that reside in the area. Expenditures are shown by broad budget categories that are not mutually exclusive. Consumer spending does not equal business revenue. Total and Average Amount Spent Per Household represent annual figures. The Spending Potential Index represents the amount spent in the area relative to a national average of 100.

Source: Consumer Spending data are derived from the 2013 and 2014 Consumer Expenditure Surveys, Bureau of Labor Statistics, Esri.

Source: U.S. Census Bureau, Census 2010 Summary File 1, Esri forecasts for 2016 and 2021 Esri converted Census 2000 data into 2010 geography.

March 17, 2017



San Marcos City Trade Area



Community Profile

SM_7_miles_shapefile
Area: 82.95 square miles

Prepared by Esri

Population Summary

2000 Total Population	205,419
2010 Total Population	249,311
2016 Total Population	266,634
2016 Group Quarters	3,423
2021 Total Population	283,369
2016-2021 Annual Rate	1.22%
2016 Total Daytime Population	282,830
Workers	129,312
Residents	153,518

Household Summary

2000 Households	69,375
2000 Average Household Size	2.93
2010 Households	82,358
2010 Average Household Size	2.99
2016 Households	86,473
2016 Average Household Size	3.04
2021 Households	91,335
2021 Average Household Size	3.07
2016-2021 Annual Rate	1.10%
2010 Families	58,650
2010 Average Family Size	3.44
2016 Families	61,656
2016 Average Family Size	3.51
2021 Families	65,168
2021 Average Family Size	3.53
2016-2021 Annual Rate	1.11%

Housing Unit Summary

2000 Housing Units	72,009
Owner Occupied Housing Units	57.0%
Renter Occupied Housing Units	39.4%
Vacant Housing Units	3.7%
2010 Housing Units	87,106
Owner Occupied Housing Units	54.7%
Renter Occupied Housing Units	39.9%
Vacant Housing Units	5.5%
2016 Housing Units	91,497
Owner Occupied Housing Units	53.1%
Renter Occupied Housing Units	41.4%
Vacant Housing Units	5.5%
2021 Housing Units	96,132
Owner Occupied Housing Units	53.2%
Renter Occupied Housing Units	41.8%
Vacant Housing Units	5.0%

Median Household Income

2016	\$56,791
2021	\$62,299

Median Home Value

2016	\$450,241
2021	\$498,207

Per Capita Income

2016	\$26,832
2021	\$28,948

Median Age

2010	33.9
2016	34.6
2021	35.5

Data Note: Household population includes persons not residing in group quarters. Average Household Size is the household population divided by total households. Persons in families include the householder and persons related to the householder by birth, marriage, or adoption. Per Capita Income represents the income received by all persons aged 15 years and over divided by the total population.

Source: U.S. Census Bureau, Census 2010 Summary File 1. Esri forecasts for 2016 and 2021 Esri converted Census 2000 data into 2010 geography.

March 17, 2017





Community Profile

SM_7_miles_shapefile
Area: 82.95 square miles

Prepared by Esri

2016 Households by Income

Household Income Base	86,473
<\$15,000	11.4%
\$15,000 - \$24,999	8.6%
\$25,000 - \$34,999	9.7%
\$35,000 - \$49,999	14.2%
\$50,000 - \$74,999	16.9%
\$75,000 - \$99,999	12.1%
\$100,000 - \$149,999	14.2%
\$150,000 - \$199,999	6.7%
\$200,000+	6.1%
Average Household Income	\$80,975

2021 Households by Income

Household Income Base	91,335
<\$15,000	12.2%
\$15,000 - \$24,999	7.7%
\$25,000 - \$34,999	8.8%
\$35,000 - \$49,999	13.3%
\$50,000 - \$74,999	13.8%
\$75,000 - \$99,999	13.5%
\$100,000 - \$149,999	16.1%
\$150,000 - \$199,999	7.6%
\$200,000+	6.9%
Average Household Income	\$88,123

2016 Owner Occupied Housing Units by Value

Total	48,609
<\$50,000	4.4%
\$50,000 - \$99,999	2.8%
\$100,000 - \$149,999	1.6%
\$150,000 - \$199,999	2.9%
\$200,000 - \$249,999	3.8%
\$250,000 - \$299,999	6.1%
\$300,000 - \$399,999	19.6%
\$400,000 - \$499,999	17.5%
\$500,000 - \$749,999	28.4%
\$750,000 - \$999,999	8.3%
\$1,000,000 +	4.6%
Average Home Value	\$490,295

2021 Owner Occupied Housing Units by Value

Total	51,136
<\$50,000	3.3%
\$50,000 - \$99,999	2.4%
\$100,000 - \$149,999	1.0%
\$150,000 - \$199,999	2.0%
\$200,000 - \$249,999	1.7%
\$250,000 - \$299,999	2.4%
\$300,000 - \$399,999	12.4%
\$400,000 - \$499,999	25.2%
\$500,000 - \$749,999	33.5%
\$750,000 - \$999,999	10.4%
\$1,000,000 +	5.6%
Average Home Value	\$545,483

Data Note: Income represents the preceding year, expressed in current dollars. Household income includes wage and salary earnings, interest dividends, net rents, pensions, SSI and welfare payments, child support, and alimony.

Source: U.S. Census Bureau, Census 2010 Summary File 1. Esri forecasts for 2016 and 2021 Esri converted Census 2000 data into 2010 geography.

March 17, 2017



Community Profile

SM_7_miles_shapefile
Area: 82.95 square miles

Prepared by Esri

2010 Population by Age	
Total	249,308
0 - 4	7.9%
5 - 9	7.4%
10 - 14	7.0%
15 - 24	14.8%
25 - 34	14.4%
35 - 44	14.4%
45 - 54	13.3%
55 - 64	9.7%
65 - 74	5.4%
75 - 84	3.6%
85 +	2.0%
18 +	73.4%
2016 Population by Age	
Total	266,632
0 - 4	7.5%
5 - 9	7.3%
10 - 14	7.0%
15 - 24	13.6%
25 - 34	15.2%
35 - 44	13.6%
45 - 54	12.4%
55 - 64	10.7%
65 - 74	6.9%
75 - 84	3.7%
85 +	2.2%
18 +	74.4%
2021 Population by Age	
Total	283,369
0 - 4	7.5%
5 - 9	7.1%
10 - 14	6.9%
15 - 24	12.3%
25 - 34	15.4%
35 - 44	14.3%
45 - 54	11.7%
55 - 64	10.7%
65 - 74	7.9%
75 - 84	4.1%
85 +	2.1%
18 +	74.9%
2010 Population by Sex	
Males	122,831
Females	126,480
2016 Population by Sex	
Males	131,431
Females	135,203
2021 Population by Sex	
Males	139,803
Females	143,566

Source: U.S. Census Bureau, Census 2010 Summary File 1. Esri forecasts for 2016 and 2021 Esri converted Census 2000 data into 2010 geography.

March 17, 2017



Community Profile

SM_7_miles_shapefile
Area: 82.95 square miles

Prepared by Esri

2010 Population by Race/Ethnicity

Total	249,310
White Alone	64.5%
Black Alone	2.5%
American Indian Alone	0.9%
Asian Alone	6.8%
Pacific Islander Alone	0.3%
Some Other Race Alone	20.1%
Two or More Races	4.8%
Hispanic Origin	39.4%
Diversity Index	78.0

2016 Population by Race/Ethnicity

Total	266,633
White Alone	62.2%
Black Alone	2.5%
American Indian Alone	0.9%
Asian Alone	7.5%
Pacific Islander Alone	0.3%
Some Other Race Alone	21.4%
Two or More Races	5.2%
Hispanic Origin	41.8%
Diversity Index	79.8

2021 Population by Race/Ethnicity

Total	283,369
White Alone	60.5%
Black Alone	2.5%
American Indian Alone	0.8%
Asian Alone	8.2%
Pacific Islander Alone	0.3%
Some Other Race Alone	22.2%
Two or More Races	5.5%
Hispanic Origin	43.9%
Diversity Index	81.1

2010 Population by Relationship and Household Type

Total	249,311
In Households	98.7%
In Family Households	85.2%
Householder	23.5%
Spouse	17.6%
Child	33.0%
Other relative	6.9%
Nonrelative	4.2%
In Nonfamily Households	13.4%
In Group Quarters	1.3%
Institutionalized Population	0.3%
Noninstitutionalized Population	1.0%

Data Note: Persons of Hispanic Origin may be of any race. The Diversity Index measures the probability that two people from the same area will be from different race/ethnic groups.

Source: U.S. Census Bureau, Census 2010 Summary File 1. Esri forecasts for 2016 and 2021 Esri converted Census 2000 data into 2010 geography.

March 17, 2017





Community Profile

SM_7_miles_shapefile
Area: 82.95 square miles

Prepared by Esri

2016 Population 25+ by Educational Attainment

Total	172,386
Less than 9th Grade	11.7%
9th - 12th Grade, No Diploma	7.4%
High School Graduate	17.3%
GED/Alternative Credential	2.0%
Some College, No Degree	18.7%
Associate Degree	14.6%
Bachelor's Degree	19.5%
Graduate/Professional Degree	8.9%

2016 Population 15+ by Marital Status

Total	208,551
Never Married	33.4%
Married	50.9%
Widowed	5.6%
Divorced	10.1%

2016 Civilian Population 16+ in Labor Force

Civilian Employed	95.1%
Civilian Unemployed	4.9%

2016 Employed Population 16+ by Industry

Total	114,056
Agriculture/Mining	3.0%
Construction	7.2%
Manufacturing	11.4%
Wholesale Trade	3.1%
Retail Trade	11.1%
Transportation/Utilities	3.3%
Information	1.9%
Finance/Insurance/Real Estate	5.9%
Services	50.6%
Public Administration	2.7%

2016 Employed Population 16+ by Occupation

Total	114,057
White Collar	58.3%
Management/Business/Financial	14.4%
Professional	20.3%
Sales	10.7%
Administrative Support	13.0%
Services	20.8%
Blue Collar	20.9%
Farming/Forestry/Fishing	2.6%
Construction/Extraction	6.0%
Installation/Maintenance/Repair	2.3%
Production	5.4%
Transportation/Material Moving	4.6%

2010 Population By Urban/ Rural Status

Total Population	249,311
Population Inside Urbanized Area	98.8%
Population Inside Urbanized Cluster	0.0%
Rural Population	1.2%

Source: U.S. Census Bureau, Census 2010 Summary File 1, Esri forecasts for 2016 and 2021 Esri converted Census 2000 data into 2010 geography.

March 17, 2017





Community Profile

SM_7_miles_shapefile
Area: 82.95 square miles

Prepared by Esri

2010 Households by Type

Total	82,358
Households with 1 Person	20.9%
Households with 2+ People	79.1%
Family Households	71.2%
Husband-wife Families	53.3%
With Related Children	28.1%
Other Family (No Spouse Present)	18.0%
Other Family with Male Householder	6.0%
With Related Children	3.7%
Other Family with Female Householder	12.0%
With Related Children	7.7%
Nonfamily Households	7.9%
All Households with Children	40.1%
Multigenerational Households	5.9%
Unmarried Partner Households	6.8%
Male-female	6.1%
Same-sex	0.7%

2010 Households by Size

Total	82,358
1 Person Household	20.9%
2 Person Household	29.5%
3 Person Household	16.6%
4 Person Household	15.7%
5 Person Household	8.6%
6 Person Household	4.3%
7 + Person Household	4.6%

2010 Households by Tenure and Mortgage Status

Total	82,358
Owner Occupied	57.8%
Owned with a Mortgage/Loan	46.1%
Owned Free and Clear	11.7%
Renter Occupied	42.2%

2010 Housing Units By Urban/ Rural Status

Total Housing Units	87,106
Housing Units Inside Urbanized Area	98.8%
Housing Units Inside Urbanized Cluster	0.0%
Rural Housing Units	1.2%

Data Note: Households with children include any households with people under age 18, related or not. Multigenerational households are families with 3 or more parent-child relationships. Unmarried partner households are usually classified as nonfamily households unless there is another member of the household related to the householder. Multigenerational and unmarried partner households are reported only to the tract level. Esri estimated block group data, which is used to estimate polygons or non-standard geography.

Source: U.S. Census Bureau, Census 2010 Summary File 1. Esri forecasts for 2016 and 2021 Esri converted Census 2000 data into 2010 geography.

March 17, 2017





Community Profile

SM_7_miles_shapefile
Area: 82.95 square miles

Prepared by Esri

Top 3 Tapestry Segments

1. Pleasantville (2B)
2. Boomburbs (1C)
3. NeWest Residents (13C)

2016 Consumer Spending

Apparel & Services: Total \$	\$187,811,257
Average Spent	\$2,171.91
Spending Potential Index	108
Education: Total \$	\$131,609,681
Average Spent	\$1,521.97
Spending Potential Index	108
Entertainment/Recreation: Total \$	\$262,584,899
Average Spent	\$3,036.61
Spending Potential Index	104
Food at Home: Total \$	\$450,098,646
Average Spent	\$5,205.08
Spending Potential Index	104
Food Away from Home: Total \$	\$284,396,940
Average Spent	\$3,288.85
Spending Potential Index	106
Health Care: Total \$	\$458,269,458
Average Spent	\$5,299.57
Spending Potential Index	100
HH Furnishings & Equipment: Total \$	\$160,753,477
Average Spent	\$1,859.00
Spending Potential Index	105
Personal Care Products & Services: Total \$	\$67,434,603
Average Spent	\$779.83
Spending Potential Index	106
Shelter: Total \$	\$1,472,684,093
Average Spent	\$17,030.57
Spending Potential Index	109
Support Payments/Cash Contributions/Gifts in Kind: Total \$	\$203,230,950
Average Spent	\$2,350.22
Spending Potential Index	101
Travel: Total \$	\$171,777,138
Average Spent	\$1,986.48
Spending Potential Index	107
Vehicle Maintenance & Repairs: Total \$	\$92,487,304
Average Spent	\$1,069.55
Spending Potential Index	103

Data Note: Consumer spending shows the amount spent on a variety of goods and services by households that reside in the area. Expenditures are shown by broad budget categories that are not mutually exclusive. Consumer spending does not equal business revenue. Total and Average Amount Spent Per Household represent annual figures. The Spending Potential Index represents the amount spent in the area relative to a national average of 100.

Source: Consumer Spending data are derived from the 2013 and 2014 Consumer Expenditure Surveys, Bureau of Labor Statistics, Esri.

Source: U.S. Census Bureau, Census 2010 Summary File 1. Esri forecasts for 2016 and 2021 Esri converted Census 2000 data into 2010 geography.

March 17, 2017



San Marcos City (Jurisdictional Boundary)



Community Profile

San Marcos City, CA
San Marcos City, CA (0668196)
Geography: Place

Prepared by Esri

	San Marcos ci...
Population Summary	
2000 Total Population	57,760
2010 Total Population	83,781
2016 Total Population	92,547
2016 Group Quarters	827
2021 Total Population	99,877
2016-2021 Annual Rate	1.54%
2016 Total Daytime Population	89,543
Workers	34,974
Residents	54,569
Household Summary	
2000 Households	19,161
2000 Average Household Size	3.00
2010 Households	27,202
2010 Average Household Size	3.05
2016 Households	29,473
2016 Average Household Size	3.11
2021 Households	31,569
2021 Average Household Size	3.14
2016-2021 Annual Rate	1.38%
2010 Families	19,811
2010 Average Family Size	3.49
2016 Families	21,427
2016 Average Family Size	3.56
2021 Families	22,977
2021 Average Family Size	3.59
2016-2021 Annual Rate	1.41%
Housing Unit Summary	
2000 Housing Units	19,955
Owner Occupied Housing Units	64.5%
Renter Occupied Housing Units	31.5%
Vacant Housing Units	4.0%
2010 Housing Units	28,641
Owner Occupied Housing Units	59.7%
Renter Occupied Housing Units	35.3%
Vacant Housing Units	5.0%
2016 Housing Units	30,865
Owner Occupied Housing Units	58.9%
Renter Occupied Housing Units	36.6%
Vacant Housing Units	4.5%
2021 Housing Units	32,785
Owner Occupied Housing Units	59.0%
Renter Occupied Housing Units	37.3%
Vacant Housing Units	3.7%
Median Household Income	
2016	\$57,953
2021	\$64,178
Median Home Value	
2016	\$458,412
2021	\$505,829
Per Capita Income	
2016	\$27,070
2021	\$29,311
Median Age	
2010	32.8
2016	34.2
2021	35.1

Data Note: Household population includes persons not residing in group quarters. Average Household Size is the household population divided by total households. Persons in families include the householder and persons related to the householder by birth, marriage, or adoption. Per Capita Income represents the income received by all persons aged 15 years and over divided by the total population.

Source: U.S. Census Bureau, Census 2010 Summary File 1. Esri forecasts for 2016 and 2021. Esri converted Census 2000 data into 2010 geography.

March 10, 2017

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ESRI





Community Profile

San Marcos City, CA
San Marcos City, CA (0668196)
Geography: Place

Prepared by Esri

	San Marcos ci...
2016 Households by Income	
Household Income Base	29,473
<\$15,000	12.0%
\$15,000 - \$24,999	7.9%
\$25,000 - \$34,999	8.9%
\$35,000 - \$49,999	14.0%
\$50,000 - \$74,999	17.7%
\$75,000 - \$99,999	11.4%
\$100,000 - \$149,999	13.6%
\$150,000 - \$199,999	8.0%
\$200,000+	6.6%
Average Household Income	\$82,954
2021 Households by Income	
Household Income Base	31,567
<\$15,000	12.8%
\$15,000 - \$24,999	7.0%
\$25,000 - \$34,999	8.3%
\$35,000 - \$49,999	13.0%
\$50,000 - \$74,999	13.7%
\$75,000 - \$99,999	12.9%
\$100,000 - \$149,999	15.6%
\$150,000 - \$199,999	9.1%
\$200,000+	7.5%
Average Household Income	\$90,648
2016 Owner Occupied Housing Units by Value	
Total	18,190
<\$50,000	5.1%
\$50,000 - \$99,999	5.0%
\$100,000 - \$149,999	2.1%
\$150,000 - \$199,999	2.9%
\$200,000 - \$249,999	3.1%
\$250,000 - \$299,999	4.3%
\$300,000 - \$399,999	17.6%
\$400,000 - \$499,999	16.8%
\$500,000 - \$749,999	31.1%
\$750,000 - \$999,999	7.3%
\$1,000,000 +	4.6%
Average Home Value	\$484,900
2021 Owner Occupied Housing Units by Value	
Total	19,353
<\$50,000	3.7%
\$50,000 - \$99,999	4.3%
\$100,000 - \$149,999	1.5%
\$150,000 - \$199,999	1.8%
\$200,000 - \$249,999	1.3%
\$250,000 - \$299,999	1.3%
\$300,000 - \$399,999	11.7%
\$400,000 - \$499,999	23.6%
\$500,000 - \$749,999	35.6%
\$750,000 - \$999,999	9.6%
\$1,000,000 +	5.6%
Average Home Value	\$539,699

Data Note: Income represents the preceding year, expressed in current dollars. Household income includes wage and salary earnings, interest dividends, net rents, pensions, SSI and welfare payments, child support, and alimony.

Source: U.S. Census Bureau, Census 2010 Summary File 1. Esri forecasts for 2016 and 2021 Esri converted Census 2000 data into 2010 geography.

March 10, 2017

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Community Profile

San Marcos City, CA
San Marcos City, CA (0668196)
Geography: Place

Prepared by Esri

	San Marcos ci...
2010 Population by Age	
Total	83,781
0 - 4	8.4%
5 - 9	7.9%
10 - 14	7.3%
15 - 24	15.3%
25 - 34	14.4%
35 - 44	15.8%
45 - 54	12.2%
55 - 64	8.7%
65 - 74	5.1%
75 - 84	3.4%
85 +	1.6%
18 +	72.2%
2016 Population by Age	
Total	92,540
0 - 4	7.8%
5 - 9	7.6%
10 - 14	7.2%
15 - 24	13.5%
25 - 34	15.0%
35 - 44	14.4%
45 - 54	12.1%
55 - 64	10.0%
65 - 74	6.7%
75 - 84	3.6%
85 +	2.0%
18 +	73.7%
2021 Population by Age	
Total	99,875
0 - 4	7.7%
5 - 9	7.5%
10 - 14	7.2%
15 - 24	12.2%
25 - 34	15.2%
35 - 44	15.0%
45 - 54	11.7%
55 - 64	9.9%
65 - 74	7.5%
75 - 84	4.0%
85 +	2.0%
18 +	73.8%
2010 Population by Sex	
Males	40,957
Females	42,824
2016 Population by Sex	
Males	45,285
Females	47,255
2021 Population by Sex	
Males	48,929
Females	50,946

Source: U.S. Census Bureau, Census 2010 Summary File 1. Esri forecasts for 2016 and 2021 Esri converted Census 2000 data into 2010 geography.

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Community Profile

San Marcos City, CA
San Marcos City, CA (0668196)
Geography: Place

Prepared by Esri

	San Marcos ci...
2010 Population by Race/Ethnicity	
Total	83,781
White Alone	63.5%
Black Alone	2.3%
American Indian Alone	0.7%
Asian Alone	9.0%
Pacific Islander Alone	0.4%
Some Other Race Alone	18.9%
Two or More Races	5.1%
Hispanic Origin	36.6%
Diversity Index	77.9
2016 Population by Race/Ethnicity	
Total	92,545
White Alone	61.8%
Black Alone	2.4%
American Indian Alone	0.7%
Asian Alone	9.5%
Pacific Islander Alone	0.4%
Some Other Race Alone	19.8%
Two or More Races	5.5%
Hispanic Origin	38.4%
Diversity Index	79.4
2021 Population by Race/Ethnicity	
Total	99,876
White Alone	59.9%
Black Alone	2.4%
American Indian Alone	0.7%
Asian Alone	10.3%
Pacific Islander Alone	0.4%
Some Other Race Alone	20.5%
Two or More Races	5.8%
Hispanic Origin	40.4%
Diversity Index	80.8
2010 Population by Relationship and Household Type	
Total	83,781
In Households	99.0%
In Family Households	86.0%
Householder	23.6%
Spouse	18.2%
Child	34.1%
Other relative	6.5%
Nonrelative	3.6%
In Nonfamily Households	13.0%
In Group Quarters	1.0%
Institutionalized Population	0.1%
Noninstitutionalized Population	0.9%

Data Note: Persons of Hispanic Origin may be of any race. The Diversity Index measures the probability that two people from the same area will be from different race/ethnic groups.

Source: U.S. Census Bureau, Census 2010 Summary File 1. Esri forecasts for 2016 and 2021. Esri converted Census 2000 data into 2010 geography.

March 10, 2017

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Community Profile

San Marcos City, CA
San Marcos City, CA (0668196)
Geography: Place

Prepared by Esri

	San Marcos ci...
2016 Population 25+ by Educational Attainment	
Total	59,135
Less than 9th Grade	10.0%
9th - 12th Grade, No Diploma	6.0%
High School Graduate	16.4%
GED/Alternative Credential	1.4%
Some College, No Degree	17.4%
Associate Degree	17.3%
Bachelor's Degree	21.6%
Graduate/Professional Degree	10.0%
2016 Population 15+ by Marital Status	
Total	71,670
Never Married	32.0%
Married	52.5%
Widowed	6.0%
Divorced	9.6%
2016 Civilian Population 16+ In Labor Force	
Civilian Employed	95.1%
Civilian Unemployed	4.9%
2016 Employed Population 16+ by Industry	
Total	38,343
Agriculture/Mining	2.5%
Construction	5.9%
Manufacturing	12.3%
Wholesale Trade	2.9%
Retail Trade	10.6%
Transportation/Utilities	3.2%
Information	2.5%
Finance/Insurance/Real Estate	6.6%
Services	50.5%
Public Administration	2.9%
2016 Employed Population 16+ by Occupation	
Total	38,342
White Collar	62.1%
Management/Business/Financial	15.0%
Professional	22.6%
Sales	11.7%
Administrative Support	12.8%
Services	19.8%
Blue Collar	18.0%
Farming/Forestry/Fishing	1.7%
Construction/Extraction	4.7%
Installation/Maintenance/Repair	2.1%
Production	6.0%
Transportation/Material Moving	3.5%
2010 Population By Urban/ Rural Status	
Total Population	83,781
Population Inside Urbanized Area	99.6%
Population Inside Urbanized Cluster	0.0%
Rural Population	0.4%

Source: U.S. Census Bureau, Census 2010 Summary File 1. Esri forecasts for 2016 and 2021. Esri converted Census 2000 data into 2010 geography.

March 10, 2017





Community Profile

San Marcos City, CA
San Marcos City, CA (0668196)
Geography: Place

Prepared by Esri

	San Marcos ci...
2010 Households by Type	
Total	27,202
Households with 1 Person	19.0%
Households with 2+ People	81.0%
Family Households	72.8%
Husband-wife Families	56.0%
With Related Children	32.0%
Other Family (No Spouse Present)	16.8%
Other Family with Male Householder	5.6%
With Related Children	3.5%
Other Family with Female Householder	11.2%
With Related Children	7.2%
Nonfamily Households	8.2%
All Households with Children	43.1%
Multigenerational Households	5.6%
Unmarried Partner Households	5.6%
Male-female	4.9%
Same-sex	0.7%
2010 Households by Size	
Total	27,202
1 Person Household	19.0%
2 Person Household	28.1%
3 Person Household	17.3%
4 Person Household	17.8%
5 Person Household	9.2%
6 Person Household	4.4%
7 + Person Household	4.1%
2010 Households by Tenure and Mortgage Status	
Total	27,202
Owner Occupied	62.8%
Owned with a Mortgage/Loan	50.4%
Owned Free and Clear	12.4%
Renter Occupied	37.2%
2010 Housing Units By Urban/ Rural Status	
Total Housing Units	28,641
Housing Units Inside Urbanized Area	99.6%
Housing Units Inside Urbanized Cluster	0.0%
Rural Housing Units	0.4%

Data Note: Households with children include any households with people under age 18, related or not. Multigenerational households are families with 3 or more parent-child relationships. Unmarried partner households are usually classified as nonfamily households unless there is another member of the household related to the householder. Multigenerational and unmarried partner households are reported only to the tract level. Esri estimated block group data, which is used to estimate polygons or non-standard geography.

Source: U.S. Census Bureau, Census 2010 Summary File 1. Esri forecasts for 2016 and 2021. Esri converted Census 2000 data into 2010 geography.

March 10, 2017

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Community Profile

San Marcos City, CA
San Marcos City, CA (0668196)
Geography: Place

Prepared by Esri

Top 3 Tapestry Segments		San Marcos ci...
1.		Boomburbs (1C)
2.		Soccer Moms (4A)
3.		Bright Young Professionals
2016 Consumer Spending		
Apparel & Services: Total \$		\$64,837,608
Average Spent		\$2,199.90
Spending Potential Index		109
Education: Total \$		\$43,930,290
Average Spent		\$1,490.53
Spending Potential Index		105
Entertainment/Recreation: Total \$		\$92,203,426
Average Spent		\$3,128.40
Spending Potential Index		107
Food at Home: Total \$		\$155,871,441
Average Spent		\$5,288.62
Spending Potential Index		106
Food Away from Home: Total \$		\$99,207,646
Average Spent		\$3,366.05
Spending Potential Index		109
Health Care: Total \$		\$161,642,077
Average Spent		\$5,484.41
Spending Potential Index		104
HH Furnishings & Equipment: Total \$		\$56,498,503
Average Spent		\$1,916.96
Spending Potential Index		109
Personal Care Products & Services: Total \$		\$23,644,715
Average Spent		\$802.25
Spending Potential Index		109
Shelter: Total \$		\$505,980,432
Average Spent		\$17,167.59
Spending Potential Index		110
Support Payments/Cash Contributions/Gifts in Kind: Total		\$72,299,987
Average Spent		\$2,453.09
Spending Potential Index		106
Travel: Total \$		\$60,465,168
Average Spent		\$2,051.54
Spending Potential Index		110
Vehicle Maintenance & Repairs: Total \$		\$32,415,245
Average Spent		\$1,099.83
Spending Potential Index		106

Data Note: Consumer spending shows the amount spent on a variety of goods and services by households that reside in the area. Expenditures are shown by broad budget categories that are not mutually exclusive. Consumer spending does not equal business revenue. Total and Average Amount Spent Per Household represent annual figures. The Spending Potential Index represents the amount spent in the area relative to a national average of 100.

Source: Consumer Spending data are derived from the 2013 and 2014 Consumer Expenditure Surveys, Bureau of Labor Statistics. Esri.

Source: U.S. Census Bureau, Census 2010 Summary File 1. Esri forecasts for 2016 and 2021. Esri converted Census 2000 data into 2010 geography.

March 10, 2017

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APPENDIX E – ESRI TAPESTRY SEGMENTATION DATA

San Marcos Creek SP Trade Area



Tapestry Segmentation Area Profile

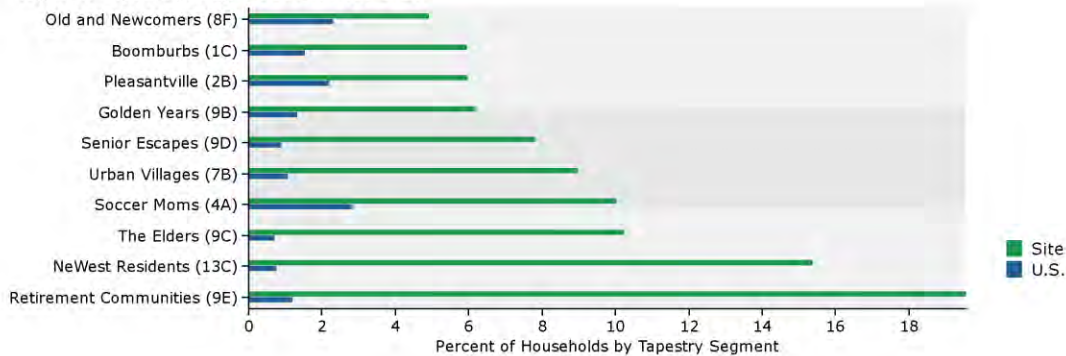
SPA_2_miles_shapefile
Area: 6.91 square miles

Prepared by Esri

Top Twenty Tapestry Segments

Rank	Tapestry Segment	2016 Households		2016 U.S. Households		Index
		Percent	Cumulative Percent	Percent	Cumulative Percent	
1	Retirement Communities (9E)	19.6%	19.6%	1.2%	1.2%	1610
2	NeWest Residents (13C)	15.4%	35.0%	0.8%	2.0%	1,981
3	The Elders (9C)	10.3%	45.3%	0.7%	2.7%	1,409
4	Soccer Moms (4A)	10.0%	55.3%	2.8%	5.5%	353
5	Urban Villages (7B)	9.0%	64.3%	1.1%	6.6%	837
	Subtotal	64.3%		6.6%		
6	Senior Escapes (9D)	7.8%	72.1%	0.9%	7.5%	861
7	Golden Years (9B)	6.2%	78.3%	1.3%	8.8%	462
8	Pleasantville (2B)	6.0%	84.3%	2.2%	11.0%	270
9	Boomburbs (1C)	6.0%	90.3%	1.5%	12.5%	386
10	Old and Newcomers (8F)	4.9%	95.2%	2.3%	14.8%	212
	Subtotal	30.9%		8.2%		
11	Las Casas (13B)	4.8%	100.0%	0.7%	15.5%	651
	Subtotal	4.8%		0.7%		
	Total	100.0%		15.7%		636

Top Ten Tapestry Segments Site vs. U.S.



Data Note: This report identifies neighborhood segments in the area, and describes the socioeconomic quality of the immediate neighborhood. The index is a comparison of the percent of households or Total Population 18+ in the area, by Tapestry segment, to the percent of households or Total Population 18+ in the United States, by segment. An index of 100 is the US average.

Source: Esri

March 28, 2017



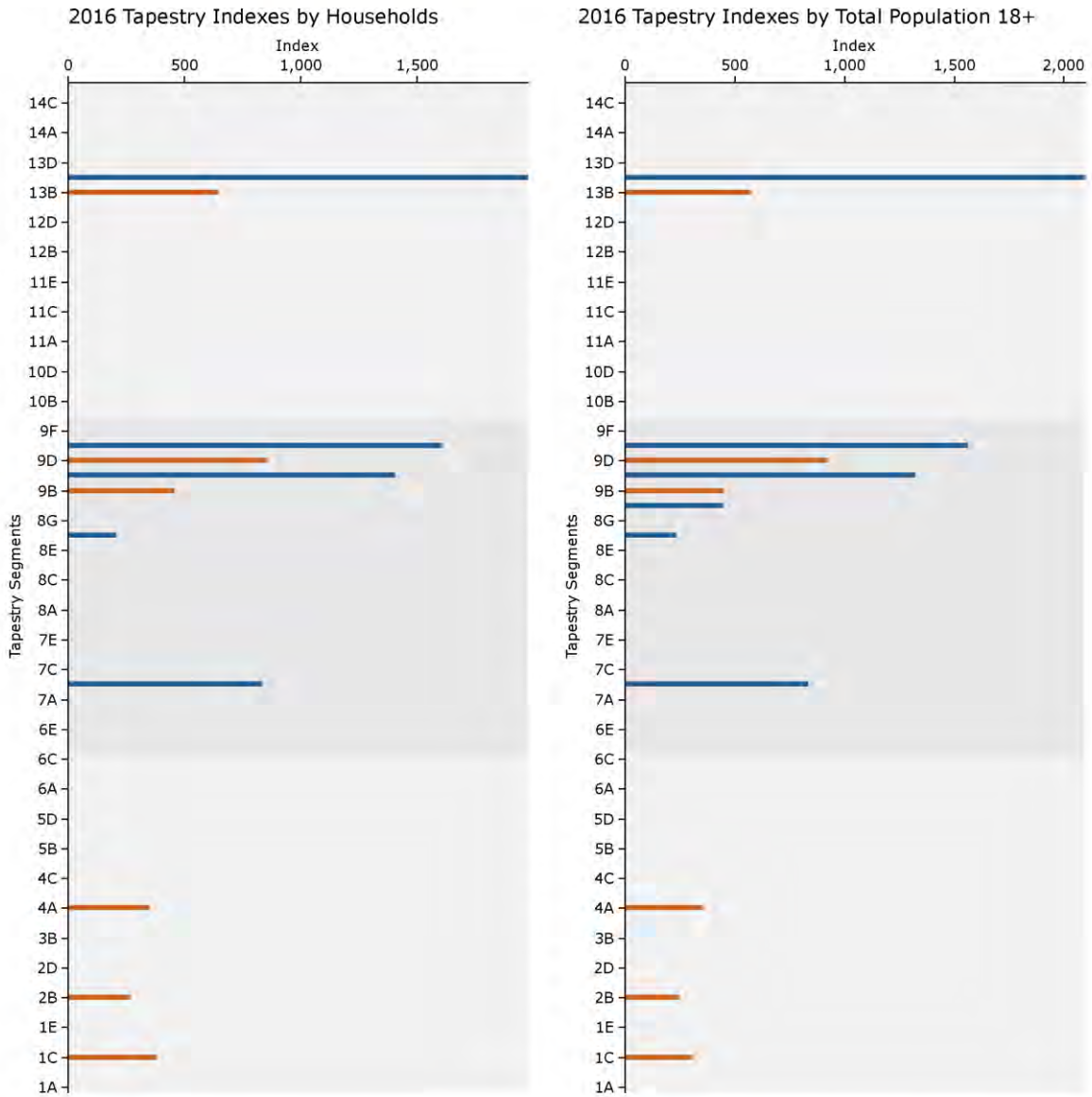




Tapestry Segmentation Area Profile

SPA_2_miles_shapefile
Area: 6.91 square miles

Prepared by Esri



Data Note: This report identifies neighborhood segments in the area, and describes the socioeconomic quality of the immediate neighborhood. The index is a comparison of the percent of households or Total Population 18+ in the area, by Tapestry segment, to the percent of households or Total Population 18+ in the United States, by segment. An index of 100 is the US average.
Source: Esri

March 28, 2017





Tapestry Segmentation Area Profile

SPA_2_miles_shapefile
Area: 6.91 square miles

Prepared by Esri

Tapestry LifeMode Groups	2016 Households			2016 Adult Population		
	Number	Percent	Index	Number	Percent	Index
Total:	10,039	100.0%		21,028	100.0%	
1. Affluent Estates	599	6.0%	61	1,069	5.1%	49
Top Tier (1A)	0	0.0%	0	0	0.0%	0
Professional Pride (1B)	0	0.0%	0	0	0.0%	0
Boomburbs (1C)	599	6.0%	386	1,069	5.1%	311
Savvy Suburbanites (1D)	0	0.0%	0	0	0.0%	0
Exurbanites (1E)	0	0.0%	0	0	0.0%	0
2. Upscale Avenues	601	6.0%	106	1,289	6.1%	103
Urban Chic (2A)	0	0.0%	0	0	0.0%	0
Pleasantville (2B)	601	6.0%	270	1,289	6.1%	248
Pacific Heights (2C)	0	0.0%	0	0	0.0%	0
Enterprising Professionals (2D)	0	0.0%	0	0	0.0%	0
3. Uptown Individuals	0	0.0%	0	0	0.0%	0
Laptops and Lattes (3A)	0	0.0%	0	0	0.0%	0
Metro Renters (3B)	0	0.0%	0	0	0.0%	0
Trendsetters (3C)	0	0.0%	0	0	0.0%	0
4. Family Landscapes	1,008	10.0%	136	2,280	10.8%	141
Soccer Moms (4A)	1,008	10.0%	353	2,280	10.8%	358
Home Improvement (4B)	0	0.0%	0	0	0.0%	0
Middleburg (4C)	0	0.0%	0	0	0.0%	0
5. GenXurban	0	0.0%	0	0	0.0%	0
Comfortable Empty Nesters (5A)	0	0.0%	0	0	0.0%	0
In Style (5B)	0	0.0%	0	0	0.0%	0
Parks and Rec (5C)	0	0.0%	0	0	0.0%	0
Rustbelt Traditions (5D)	0	0.0%	0	0	0.0%	0
Midlife Constants (5E)	0	0.0%	0	0	0.0%	0
6. Cozy Country Living	0	0.0%	0	0	0.0%	0
Green Acres (6A)	0	0.0%	0	0	0.0%	0
Salt of the Earth (6B)	0	0.0%	0	0	0.0%	0
The Great Outdoors (6C)	0	0.0%	0	0	0.0%	0
Prairie Living (6D)	0	0.0%	0	0	0.0%	0
Rural Resort Dwellers (6E)	0	0.0%	0	0	0.0%	0
Heartland Communities (6F)	0	0.0%	0	0	0.0%	0
7. Ethnic Enclaves	902	9.0%	129	2,594	12.3%	153
Up and Coming Families (7A)	0	0.0%	0	0	0.0%	0
Urban Villages (7B)	902	9.0%	837	2,594	12.3%	836
American Dreamers (7C)	0	0.0%	0	0	0.0%	0
Barrios Urbanos (7D)	0	0.0%	0	0	0.0%	0
Valley Growers (7E)	0	0.0%	0	0	0.0%	0
Southwestern Families (7F)	0	0.0%	0	0	0.0%	0

Data Note: This report identifies neighborhood segments in the area, and describes the socioeconomic quality of the immediate neighborhood. The index is a comparison of the percent of households or Total Population 18+ in the area, by Tapestry segment, to the percent of households or Total Population 18+ in the United States, by segment. An index of 100 is the US average.

Source: Esri

March 28, 2017





Tapestry Segmentation Area Profile

SPA_2_miles_shapefile
Area: 6.91 square miles

Prepared by Esri

Tapestry LifeMode Groups	2016 Households			2016 Adult Population		
	Number	Percent	Index	Number	Percent	Index
Total:	10,039	100.0%		21,028	100.0%	
8. Middle Ground	495	4.9%	45	990	4.7%	46
City Lights (8A)	0	0.0%	0	0	0.0%	0
Emerald City (8B)	0	0.0%	0	0	0.0%	0
Bright Young Professionals (8C)	0	0.0%	0	0	0.0%	0
Downtown Melting Pot (8D)	0	0.0%	0	0	0.0%	0
Front Porches (8E)	0	0.0%	0	0	0.0%	0
Old and Newcomers (8F)	495	4.9%	212	990	4.7%	234
Hardscrabble Road (8G)	0	0.0%	0	0	0.0%	0
9. Senior Styles	4,404	43.9%	761	7,771	37.0%	739
Silver & Gold (9A)	0	0.0%	0	0	0.0%	0
Golden Years (9B)	622	6.2%	462	1,129	5.4%	452
The Elders (9C)	1,030	10.3%	1,409	1,640	7.8%	1,323
Senior Escapes (9D)	786	7.8%	861	1,648	7.8%	925
Retirement Communities (9E)	1,966	19.6%	1,611	3,354	16.0%	1,565
Social Security Set (9F)	0	0.0%	0	0	0.0%	0
10. Rustic Outposts	0	0.0%	0	0	0.0%	0
Southern Satellites (10A)	0	0.0%	0	0	0.0%	0
Rooted Rural (10B)	0	0.0%	0	0	0.0%	0
Diners & Miners (10C)	0	0.0%	0	0	0.0%	0
Down the Road (10D)	0	0.0%	0	0	0.0%	0
Rural Bypasses (10E)	0	0.0%	0	0	0.0%	0
11. Midtown Singles	0	0.0%	0	0	0.0%	0
City Strivers (11A)	0	0.0%	0	0	0.0%	0
Young and Restless (11B)	0	0.0%	0	0	0.0%	0
Metro Fusion (11C)	0	0.0%	0	0	0.0%	0
Set to Impress (11D)	0	0.0%	0	0	0.0%	0
City Commons (11E)	0	0.0%	0	0	0.0%	0
12. Hometown	0	0.0%	0	0	0.0%	0
Family Foundations (12A)	0	0.0%	0	0	0.0%	0
Traditional Living (12B)	0	0.0%	0	0	0.0%	0
Small Town Simplicity (12C)	0	0.0%	0	0	0.0%	0
Modest Income Homes (12D)	0	0.0%	0	0	0.0%	0
13. Next Wave	2,030	20.2%	519	5,035	23.9%	535
International Marketplace (13A)	0	0.0%	0	0	0.0%	0
Las Casas (13B)	484	4.8%	651	1,234	5.9%	576
NeWest Residents (13C)	1,546	15.4%	1,981	3,801	18.1%	2,099
Fresh Ambitions (13D)	0	0.0%	0	0	0.0%	0
High Rise Renters (13E)	0	0.0%	0	0	0.0%	0
14. Scholars and Patriots	0	0.0%	0	0	0.0%	0
Military Proximity (14A)	0	0.0%	0	0	0.0%	0
College Towns (14B)	0	0.0%	0	0	0.0%	0
Dorms to Diplomas (14C)	0	0.0%	0	0	0.0%	0
Unclassified (15)	0	0.0%	0	0	0.0%	0

Data Note: This report identifies neighborhood segments in the area, and describes the socioeconomic quality of the immediate neighborhood. The index is a comparison of the percent of households or Total Population 18+ in the area, by Tapestry segment, to the percent of households or Total Population 18+ in the United States, by segment. An index of 100 is the US average.

Source: Esri

March 28, 2017





Tapestry Segmentation Area Profile

SPA_2_miles_shapefile
Area: 6.91 square miles

Prepared by Esri

Tapestry Urbanization Groups	2016 Households			2016 Adult Population		
	Number	Percent	Index	Number	Percent	Index
Total:	10,039	100.0%		21,028	100.0%	
1. Principal Urban Center	1,546	15.4%	220	3,801	18.1%	273
Laptops and Lattes (3A)	0	0.0%	0	0	0.0%	0
Metro Renters (3B)	0	0.0%	0	0	0.0%	0
Trendsetters (3C)	0	0.0%	0	0	0.0%	0
Downtown Melting Pot (8D)	0	0.0%	0	0	0.0%	0
City Strivers (11A)	0	0.0%	0	0	0.0%	0
NeWest Residents (13C)	1,546	15.4%	1,981	3,801	18.1%	2,099
Fresh Ambitions (13D)	0	0.0%	0	0	0.0%	0
High Rise Renters (13E)	0	0.0%	0	0	0.0%	0
2. Urban Periphery	1,386	13.8%	82	3,828	18.2%	102
Pacific Heights (2C)	0	0.0%	0	0	0.0%	0
Rustbelt Traditions (5D)	0	0.0%	0	0	0.0%	0
Urban Villages (7B)	902	9.0%	837	2,594	12.3%	836
American Dreamers (7C)	0	0.0%	0	0	0.0%	0
Barrios Urbanos (7D)	0	0.0%	0	0	0.0%	0
Southwestern Families (7F)	0	0.0%	0	0	0.0%	0
City Lights (8A)	0	0.0%	0	0	0.0%	0
Bright Young Professionals (8C)	0	0.0%	0	0	0.0%	0
Metro Fusion (11C)	0	0.0%	0	0	0.0%	0
Family Foundations (12A)	0	0.0%	0	0	0.0%	0
Modest Income Homes (12D)	0	0.0%	0	0	0.0%	0
International Marketplace (13A)	0	0.0%	0	0	0.0%	0
Las Casas (13B)	484	4.8%	651	1,234	5.9%	576
3. Metro Cities	2,461	24.5%	134	4,344	20.7%	122
In Style (5B)	0	0.0%	0	0	0.0%	0
Emerald City (8B)	0	0.0%	0	0	0.0%	0
Front Porches (8E)	0	0.0%	0	0	0.0%	0
Old and Newcomers (8F)	495	4.9%	212	990	4.7%	234
Hardscrabble Road (8G)	0	0.0%	0	0	0.0%	0
Retirement Communities (9E)	1,966	19.6%	1,611	3,354	16.0%	1,565
Social Security Set (9F)	0	0.0%	0	0	0.0%	0
Young and Restless (11B)	0	0.0%	0	0	0.0%	0
Set to Impress (11D)	0	0.0%	0	0	0.0%	0
City Commons (11E)	0	0.0%	0	0	0.0%	0
Traditional Living (12B)	0	0.0%	0	0	0.0%	0
College Towns (14B)	0	0.0%	0	0	0.0%	0
Dorms to Diplomas (14C)	0	0.0%	0	0	0.0%	0

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Source: Esri

March 28, 2017





Tapestry Segmentation Area Profile

SPA_2_miles_shapefile
Area: 6.91 square miles

Prepared by Esri

Tapestry Urbanization Groups	2016 Households			2016 Adult Population		
	Number	Percent	Index	Number	Percent	Index
Total:	10,039	100.0%		21,028	100.0%	
4. Suburban Periphery	3,860	38.5%	122	7,407	35.2%	109
Top Tier (1A)	0	0.0%	0	0	0.0%	0
Professional Pride (1B)	0	0.0%	0	0	0.0%	0
Boomburbs (1C)	599	6.0%	386	1,069	5.1%	311
Savvy Suburbanites (1D)	0	0.0%	0	0	0.0%	0
Exurbanites (1E)	0	0.0%	0	0	0.0%	0
Urban Chic (2A)	0	0.0%	0	0	0.0%	0
Pleasantville (2B)	601	6.0%	270	1,289	6.1%	248
Enterprising Professionals (2D)	0	0.0%	0	0	0.0%	0
Soccer Moms (4A)	1,008	10.0%	353	2,280	10.8%	358
Home Improvement (4B)	0	0.0%	0	0	0.0%	0
Comfortable Empty Nesters (5A)	0	0.0%	0	0	0.0%	0
Parks and Rec (5C)	0	0.0%	0	0	0.0%	0
Midlife Constants (5E)	0	0.0%	0	0	0.0%	0
Up and Coming Families (7A)	0	0.0%	0	0	0.0%	0
Silver & Gold (9A)	0	0.0%	0	0	0.0%	0
Golden Years (9B)	622	6.2%	462	1,129	5.4%	452
The Elders (9C)	1,030	10.3%	1,409	1,640	7.8%	1,323
Military Proximity (14A)	0	0.0%	0	0	0.0%	0
5. Semirural	786	7.8%	83	1,648	7.8%	87
Middleburg (4C)	0	0.0%	0	0	0.0%	0
Heartland Communities (6F)	0	0.0%	0	0	0.0%	0
Valley Growers (7E)	0	0.0%	0	0	0.0%	0
Senior Escapes (9D)	786	7.8%	861	1,648	7.8%	925
Down the Road (10D)	0	0.0%	0	0	0.0%	0
Small Town Simplicity (12C)	0	0.0%	0	0	0.0%	0
6. Rural	0	0.0%	0	0	0.0%	0
Green Acres (6A)	0	0.0%	0	0	0.0%	0
Salt of the Earth (6B)	0	0.0%	0	0	0.0%	0
The Great Outdoors (6C)	0	0.0%	0	0	0.0%	0
Prairie Living (6D)	0	0.0%	0	0	0.0%	0
Rural Resort Dwellers (6E)	0	0.0%	0	0	0.0%	0
Southern Satellites (10A)	0	0.0%	0	0	0.0%	0
Rooted Rural (10B)	0	0.0%	0	0	0.0%	0
Diners & Miners (10C)	0	0.0%	0	0	0.0%	0
Rural Bypasses (10E)	0	0.0%	0	0	0.0%	0
Unclassified (15)	0	0.0%	0	0	0.0%	0

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Source: Esri

March 28, 2017





San Marcos City Trade Area



Tapestry Segmentation Area Profile

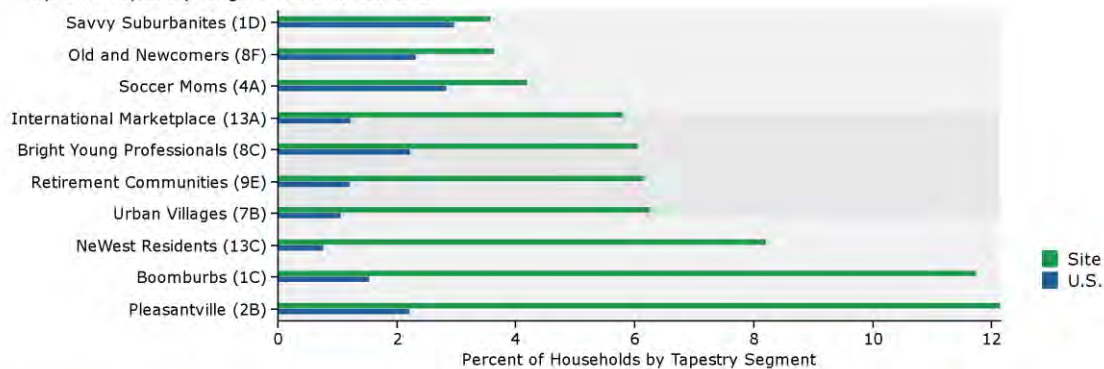
SM_7_miles_shapefile
Area: 82.95 square miles

Prepared by Esri

Top Twenty Tapestry Segments

Rank	Tapestry Segment	2016 Households Cumulative		2016 U.S. Households Cumulative		Index
		Percent	Percent	Percent	Percent	
1	Pleasantville (2B)	12.2%	12.2%	2.2%	2.2%	548
2	Boomburbs (1C)	11.7%	23.9%	1.5%	3.7%	761
3	NeWest Residents (13C)	8.2%	32.1%	0.8%	4.5%	1,057
4	Urban Villages (7B)	6.3%	38.4%	1.1%	5.6%	584
5	Retirement Communities (9E)	6.2%	44.6%	1.2%	6.8%	507
Subtotal		44.6%		6.8%		
6	Bright Young Professionals (8C)	6.1%	50.7%	2.2%	9.0%	272
7	International Marketplace (13A)	5.8%	56.5%	1.2%	10.2%	473
8	Soccer Moms (4A)	4.2%	60.7%	2.8%	13.0%	148
9	Old and Newcomers (8F)	3.7%	64.4%	2.3%	15.3%	157
10	Savvy Suburbanites (1D)	3.6%	68.0%	3.0%	18.3%	121
Subtotal		23.4%		11.5%		
11	Home Improvement (4B)	3.2%	71.2%	1.7%	20.0%	188
12	American Dreamers (7C)	2.7%	73.9%	1.5%	21.5%	184
13	Urban Chic (2A)	2.7%	76.6%	1.3%	22.8%	204
14	City Lights (8A)	2.2%	78.8%	1.5%	24.3%	152
15	Las Casas (13B)	2.2%	81.0%	0.7%	25.0%	296
Subtotal		13.0%		6.7%		
16	Golden Years (9B)	2.0%	83.0%	1.3%	26.3%	152
17	Comfortable Empty Nesters (5A)	1.9%	84.9%	2.5%	28.8%	75
18	Senior Escapes (9D)	1.8%	86.7%	0.9%	29.7%	203
19	Exurbanites (1E)	1.6%	88.3%	1.9%	31.6%	80
20	Young and Restless (11B)	1.3%	89.6%	1.7%	33.3%	77
Subtotal		8.6%		8.3%		
Total		89.6%		33.5%		267

Top Ten Tapestry Segments Site vs. U.S.



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Source: Esri

March 28, 2017

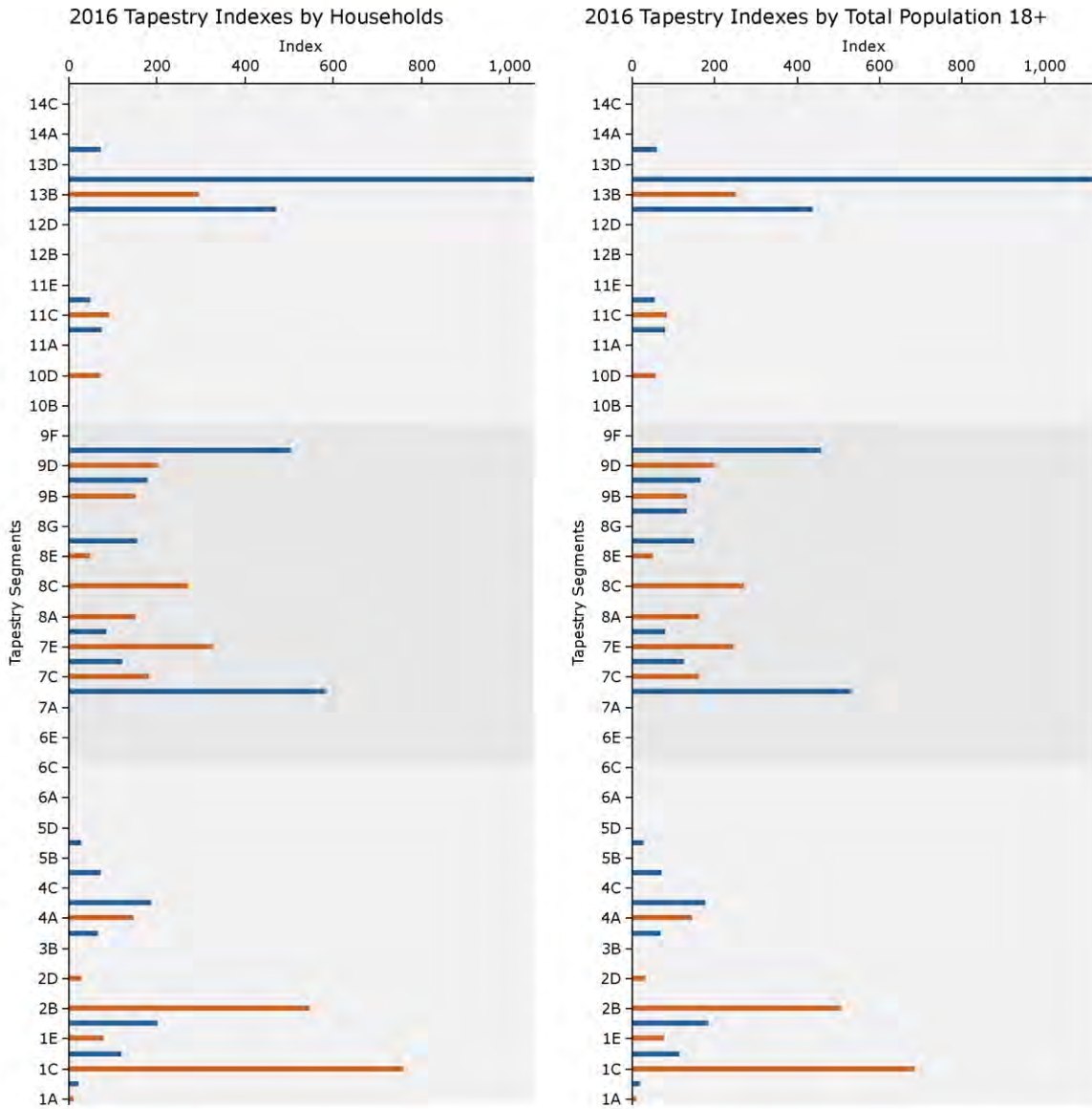




Tapestry Segmentation Area Profile

SM_7_miles_shapefile
Area: 82.95 square miles

Prepared by Esri



Data Note: This report identifies neighborhood segments in the area, and describes the socioeconomic quality of the immediate neighborhood. The index is a comparison of the percent of households or Total Population 18+ in the area, by Tapestry segment, to the percent of households or Total Population 18+ in the United States, by segment. An index of 100 is the US average.
Source: Esri

March 28, 2017





Tapestry Segmentation Area Profile

SM_7_miles_shapefile
Area: 82.95 square miles

Prepared by Esri

Tapestry LifeMode Groups	2016 Households			2016 Adult Population		
	Number	Percent	Index	Number	Percent	Index
Total:	86,474	100.0%		198,376	100.0%	
1. Affluent Estates	15,112	17.5%	179	33,752	17.0%	164
Top Tier (1A)	182	0.2%	12	423	0.2%	12
Professional Pride (1B)	321	0.4%	23	721	0.4%	20
Boomburbs (1C)	10,159	11.7%	761	22,257	11.2%	686
Savvy Suburbanites (1D)	3,103	3.6%	121	7,275	3.7%	115
Exurbanites (1E)	1,347	1.6%	80	3,076	1.6%	80
2. Upscale Avenues	13,185	15.2%	270	30,415	15.3%	259
Urban Chic (2A)	2,327	2.7%	204	4,593	2.3%	186
Pleasantville (2B)	10,514	12.2%	548	24,960	12.6%	508
Pacific Heights (2C)	0	0.0%	0	0	0.0%	0
Enterprising Professionals (2D)	344	0.4%	29	862	0.4%	33
3. Uptown Individuals	630	0.7%	20	1,354	0.7%	23
Laptops and Lattes (3A)	0	0.0%	0	0	0.0%	0
Metro Renters (3B)	0	0.0%	0	0	0.0%	0
Trendsetters (3C)	630	0.7%	68	1,354	0.7%	71
4. Family Landscapes	6,428	7.4%	101	15,432	7.8%	101
Soccer Moms (4A)	3,640	4.2%	148	8,886	4.5%	148
Home Improvement (4B)	2,788	3.2%	188	6,546	3.3%	179
Middleburg (4C)	0	0.0%	0	0	0.0%	0
5. GenXurban	2,112	2.4%	21	4,692	2.4%	22
Comfortable Empty Nesters (5A)	1,600	1.9%	75	3,538	1.8%	72
In Style (5B)	0	0.0%	0	0	0.0%	0
Parks and Rec (5C)	512	0.6%	30	1,154	0.6%	30
Rustbelt Traditions (5D)	0	0.0%	0	0	0.0%	0
Midlife Constants (5E)	0	0.0%	0	0	0.0%	0
6. Cozy Country Living	0	0.0%	0	0	0.0%	0
Green Acres (6A)	0	0.0%	0	0	0.0%	0
Salt of the Earth (6B)	0	0.0%	0	0	0.0%	0
The Great Outdoors (6C)	0	0.0%	0	0	0.0%	0
Prairie Living (6D)	0	0.0%	0	0	0.0%	0
Rural Resort Dwellers (6E)	0	0.0%	0	0	0.0%	0
Heartland Communities (6F)	0	0.0%	0	0	0.0%	0
7. Ethnic Enclaves	10,187	11.8%	169	27,174	13.7%	170
Up and Coming Families (7A)	0	0.0%	0	0	0.0%	0
Urban Villages (7B)	5,421	6.3%	584	15,558	7.8%	532
American Dreamers (7C)	2,346	2.7%	184	5,394	2.7%	164
Barrios Urbanos (7D)	1,098	1.3%	122	3,115	1.6%	126
Valley Growers (7E)	691	0.8%	328	1,558	0.8%	246
Southwestern Families (7F)	631	0.7%	87	1,549	0.8%	81

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Source: Esri

March 28, 2017





Tapestry Segmentation Area Profile

SM_7_miles_shapefile
Area: 82.95 square miles

Prepared by Esri

Tapestry LifeMode Groups	2016 Households			2016 Adult Population		
	Number	Percent	Index	Number	Percent	Index
Total:	86,474	100.0%		198,376	100.0%	
8. Middle Ground	11,028	12.8%	117	23,482	11.8%	116
City Lights (8A)	1,933	2.2%	152	4,813	2.4%	162
Emerald City (8B)	0	0.0%	0	0	0.0%	0
Bright Young Professionals (8C)	5,237	6.1%	272	10,959	5.5%	275
Downtown Melting Pot (8D)	0	0.0%	0	0	0.0%	0
Front Porches (8E)	698	0.8%	50	1,626	0.8%	53
Old and Newcomers (8F)	3,160	3.7%	157	6,084	3.1%	152
Hardscrabble Road (8G)	0	0.0%	0	0	0.0%	0
9. Senior Styles	9,833	11.4%	197	17,803	9.0%	179
Silver & Gold (9A)	9	0.0%	1	16	0.0%	1
Golden Years (9B)	1,760	2.0%	152	3,157	1.6%	134
The Elders (9C)	1,131	1.3%	180	1,968	1.0%	168
Senior Escapes (9D)	1,599	1.8%	203	3,377	1.7%	201
Retirement Communities (9E)	5,334	6.2%	507	9,285	4.7%	459
Social Security Set (9F)	0	0.0%	0	0	0.0%	0
10. Rustic Outposts	731	0.8%	10	1,372	0.7%	8
Southern Satellites (10A)	0	0.0%	0	0	0.0%	0
Rooted Rural (10B)	0	0.0%	0	0	0.0%	0
Diners & Miners (10C)	0	0.0%	0	0	0.0%	0
Down the Road (10D)	731	0.8%	74	1,372	0.7%	60
Rural Bypasses (10E)	0	0.0%	0	0	0.0%	0
11. Midtown Singles	2,868	3.3%	54	5,741	2.9%	53
City Strivers (11A)	0	0.0%	0	0	0.0%	0
Young and Restless (11B)	1,134	1.3%	77	2,221	1.1%	81
Metro Fusion (11C)	1,133	1.3%	93	2,188	1.1%	85
Set to Impress (11D)	601	0.7%	50	1,332	0.7%	56
City Commons (11E)	0	0.0%	0	0	0.0%	0
12. Hometown	0	0.0%	0	0	0.0%	0
Family Foundations (12A)	0	0.0%	0	0	0.0%	0
Traditional Living (12B)	0	0.0%	0	0	0.0%	0
Small Town Simplicity (12C)	0	0.0%	0	0	0.0%	0
Modest Income Homes (12D)	0	0.0%	0	0	0.0%	0
13. Next Wave	14,360	16.6%	426	37,159	18.7%	419
International Marketplace (13A)	5,035	5.8%	473	12,085	6.1%	440
Las Casas (13B)	1,898	2.2%	296	5,133	2.6%	254
NeWest Residents (13C)	7,102	8.2%	1,057	19,309	9.7%	1,130
Fresh Ambitions (13D)	0	0.0%	0	0	0.0%	0
High Rise Renters (13E)	325	0.4%	75	632	0.3%	62
14. Scholars and Patriots	0	0.0%	0	0	0.0%	0
Military Proximity (14A)	0	0.0%	0	0	0.0%	0
College Towns (14B)	0	0.0%	0	0	0.0%	0
Dorms to Diplomas (14C)	0	0.0%	0	0	0.0%	0
Unclassified (15)	0	0.0%	0	0	0.0%	0

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March 28, 2017





Tapestry Segmentation Area Profile

SM_7_miles_shapefile
Area: 82.95 square miles

Prepared by Esri

Tapestry Urbanization Groups	2016 Households			2016 Adult Population		
	Number	Percent	Index	Number	Percent	Index
Total:	86,474	100.0%		198,376	100.0%	
1. Principal Urban Center	8,057	9.3%	133	21,295	10.7%	162
Laptops and Lattes (3A)	0	0.0%	0	0	0.0%	0
Metro Renters (3B)	0	0.0%	0	0	0.0%	0
Trendsetters (3C)	630	0.7%	68	1,354	0.7%	71
Downtown Melting Pot (8D)	0	0.0%	0	0	0.0%	0
City Strivers (11A)	0	0.0%	0	0	0.0%	0
NeWest Residents (13C)	7,102	8.2%	1,057	19,309	9.7%	1,130
Fresh Ambitions (13D)	0	0.0%	0	0	0.0%	0
High Rise Renters (13E)	325	0.4%	75	632	0.3%	62
2. Urban Periphery	24,732	28.6%	170	60,794	30.6%	171
Pacific Heights (2C)	0	0.0%	0	0	0.0%	0
Rustbelt Traditions (5D)	0	0.0%	0	0	0.0%	0
Urban Villages (7B)	5,421	6.3%	584	15,558	7.8%	532
American Dreamers (7C)	2,346	2.7%	184	5,394	2.7%	164
Barrios Urbanos (7D)	1,098	1.3%	122	3,115	1.6%	126
Southwestern Families (7F)	631	0.7%	87	1,549	0.8%	81
City Lights (8A)	1,933	2.2%	152	4,813	2.4%	162
Bright Young Professionals (8C)	5,237	6.1%	272	10,959	5.5%	275
Metro Fusion (11C)	1,133	1.3%	93	2,188	1.1%	85
Family Foundations (12A)	0	0.0%	0	0	0.0%	0
Modest Income Homes (12D)	0	0.0%	0	0	0.0%	0
International Marketplace (13A)	5,035	5.8%	473	12,085	6.1%	440
Las Casas (13B)	1,898	2.2%	296	5,133	2.6%	254
3. Metro Cities	10,927	12.6%	69	20,548	10.4%	61
In Style (5B)	0	0.0%	0	0	0.0%	0
Emerald City (8B)	0	0.0%	0	0	0.0%	0
Front Porches (8E)	698	0.8%	50	1,626	0.8%	53
Old and Newcomers (8F)	3,160	3.7%	157	6,084	3.1%	152
Hardscrabble Road (8G)	0	0.0%	0	0	0.0%	0
Retirement Communities (9E)	5,334	6.2%	507	9,285	4.7%	459
Social Security Set (9F)	0	0.0%	0	0	0.0%	0
Young and Restless (11B)	1,134	1.3%	77	2,221	1.1%	81
Set to Impress (11D)	601	0.7%	50	1,332	0.7%	56
City Commons (11E)	0	0.0%	0	0	0.0%	0
Traditional Living (12B)	0	0.0%	0	0	0.0%	0
College Towns (14B)	0	0.0%	0	0	0.0%	0
Dorms to Diplomas (14C)	0	0.0%	0	0	0.0%	0

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Source: Esri

March 28, 2017





Tapestry Segmentation Area Profile

SM_7_miles_shapefile
Area: 82.95 square miles

Prepared by Esri

Tapestry Urbanization Groups	2016 Households			2016 Adult Population		
	Number	Percent	Index	Number	Percent	Index
Total:	86,474	100.0%		198,376	100.0%	
4. Suburban Periphery	39,737	46.0%	146	89,432	45.1%	140
Top Tier (1A)	182	0.2%	12	423	0.2%	12
Professional Pride (1B)	321	0.4%	23	721	0.4%	20
Boomburbs (1C)	10,159	11.7%	761	22,257	11.2%	686
Savvy Suburbanites (1D)	3,103	3.6%	121	7,275	3.7%	115
Exurbanites (1E)	1,347	1.6%	80	3,076	1.6%	80
Urban Chic (2A)	2,327	2.7%	204	4,593	2.3%	186
Pleasantville (2B)	10,514	12.2%	548	24,960	12.6%	508
Enterprising Professionals (2D)	344	0.4%	29	862	0.4%	33
Soccer Moms (4A)	3,640	4.2%	148	8,886	4.5%	148
Home Improvement (4B)	2,788	3.2%	188	6,546	3.3%	179
Comfortable Empty Nesters (5A)	1,600	1.9%	75	3,538	1.8%	72
Parks and Rec (5C)	512	0.6%	30	1,154	0.6%	30
Midlife Constants (5E)	0	0.0%	0	0	0.0%	0
Up and Coming Families (7A)	0	0.0%	0	0	0.0%	0
Silver & Gold (9A)	9	0.0%	1	16	0.0%	1
Golden Years (9B)	1,760	2.0%	152	3,157	1.6%	134
The Elders (9C)	1,131	1.3%	180	1,968	1.0%	168
Military Proximity (14A)	0	0.0%	0	0	0.0%	0
5. Semirural	3,021	3.5%	37	6,307	3.2%	35
Middleburg (4C)	0	0.0%	0	0	0.0%	0
Heartland Communities (6F)	0	0.0%	0	0	0.0%	0
Valley Growers (7E)	691	0.8%	328	1,558	0.8%	246
Senior Escapes (9D)	1,599	1.8%	203	3,377	1.7%	201
Down the Road (10D)	731	0.8%	74	1,372	0.7%	60
Small Town Simplicity (12C)	0	0.0%	0	0	0.0%	0
6. Rural	0	0.0%	0	0	0.0%	0
Green Acres (6A)	0	0.0%	0	0	0.0%	0
Salt of the Earth (6B)	0	0.0%	0	0	0.0%	0
The Great Outdoors (6C)	0	0.0%	0	0	0.0%	0
Prairie Living (6D)	0	0.0%	0	0	0.0%	0
Rural Resort Dwellers (6E)	0	0.0%	0	0	0.0%	0
Southern Satellites (10A)	0	0.0%	0	0	0.0%	0
Rooted Rural (10B)	0	0.0%	0	0	0.0%	0
Diners & Miners (10C)	0	0.0%	0	0	0.0%	0
Rural Bypasses (10E)	0	0.0%	0	0	0.0%	0
Unclassified (15)	0	0.0%	0	0	0.0%	0

Data Note: This report identifies neighborhood segments in the area, and describes the socioeconomic quality of the immediate neighborhood. The index is a comparison of the percent of households or Total Population 18+ in the area, by Tapestry segment, to the percent of households or Total Population 18+ in the United States, by segment. An index of 100 is the US average.

Source: Esri

March 28, 2017

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City of San Marcos (Jurisdictional Boundary)



Tapestry Segmentation Area Profile

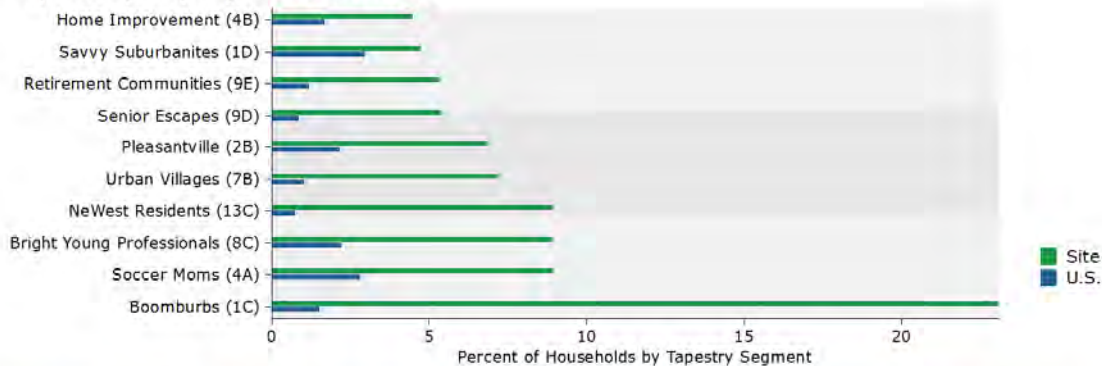
San Marcos City, CA
San Marcos City, CA (0668196)
Geography: Place

Prepared by Esri

Top Twenty Tapestry

Rank	Tapestry Segment	2016 Households		2016 U.S. Households		Index
		Percent	Cumulative Percent	Percent	Cumulative Percent	
1	Boomburbs (1C)	23.1%	23.1%	1.5%	1.5%	1497
2	Soccer Moms (4A)	9.0%	32.1%	2.8%	4.3%	315
3	Bright Young Professionals (8C)	8.9%	41.0%	2.2%	6.5%	402
4	NeWest Residents (13C)	8.9%	49.9%	0.8%	7.3%	1,147
5	Urban Villages (7B)	7.2%	57.1%	1.1%	8.4%	672
	Subtotal	57.1%		8.4%		
6	Pleasantville (2B)	6.9%	64.0%	2.2%	10.6%	309
7	Senior Escapes (9D)	5.4%	69.4%	0.9%	11.5%	597
8	Retirement Communities (9E)	5.4%	74.8%	1.2%	12.7%	441
9	Savvy Suburbanites (1D)	4.8%	79.6%	3.0%	15.7%	160
10	Home Improvement (4B)	4.5%	84.1%	1.7%	17.4%	262
	Subtotal	27.0%		9.0%		
11	Old and Newcomers (8F)	4.4%	88.5%	2.3%	19.7%	188
12	International Marketplace (13A)	3.5%	92.0%	1.2%	20.9%	287
13	The Elders (9C)	3.5%	95.5%	0.7%	21.6%	484
14	Las Casas (13B)	1.8%	97.3%	0.7%	22.3%	246
15	American Dreamers (7C)	1.6%	98.9%	1.5%	23.8%	105
	Subtotal	14.8%		6.4%		
16	Golden Years (9B)	0.7%	99.6%	1.3%	25.1%	51
17	City Lights (8A)	0.3%	99.9%	1.5%	26.6%	24
18	Exurbanites (1E)	0.1%	100.0%	1.9%	28.5%	4
	Subtotal	1.1%		4.7%		
	Total	100.0%		28.8%		348

Top Ten Tapestry Segments Site vs. U.S.



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Source: Esri

March 10, 2017

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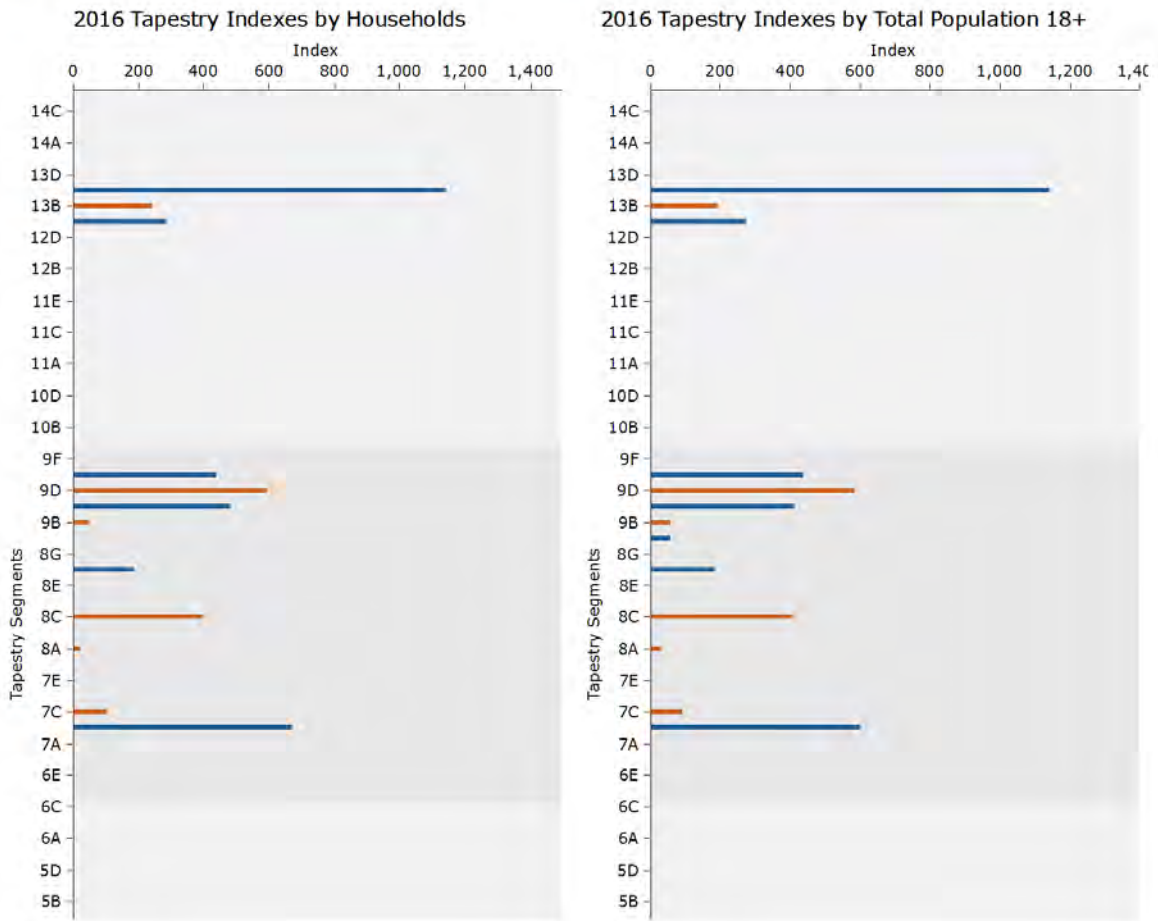


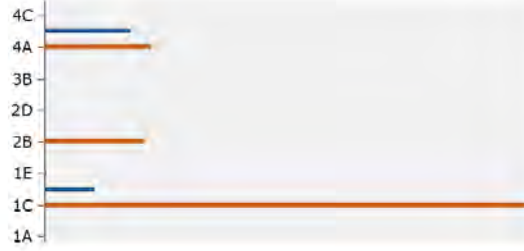


Tapestry Segmentation Area Profile

San Marcos City, CA
San Marcos City, CA (0668196)
Geography: Place

Prepared by Esri





Top Tier (1A)	0	0.0%	0	0	0.0%	0
Professional Pride (1B)	0	0.0%	0	0	0.0%	0
Boomburbs (1C)	6,813	23.1%	1497	15,616	22.9%	1400
Savvy Suburbanites (1D)	1,402	4.8%	160	3,207	4.7%	147
Exurbanites (1E)	25	0.1%	4	56	0.1%	4
2. Upscale Avenues	2,025	6.9%	121	4,880	7.2%	121
Urban Chic (2A)	0	0.0%	0	0	0.0%	0
Pleasantville (2B)	2,025	6.9%	309	4,880	7.2%	289
Pacific Heights (2C)	0	0.0%	0	0	0.0%	0
Enterprising Professionals (2D)	0	0.0%	0	0	0.0%	0
3. Uptown Individuals	0	0.0%	0	0	0.0%	0
Laptops and Lattes (3A)	0	0.0%	0	0	0.0%	0
Metro Renters (3B)	0	0.0%	0	0	0.0%	0
Trendsetters (3C)	0	0.0%	0	0	0.0%	0
4. Family Landscapes	3,971	13.5%	182	9,520	14.0%	182
Soccer Moms (4A)	2,645	9.0%	315	6,368	9.3%	308
Home Improvement (4B)	1,326	4.5%	262	3,152	4.6%	251
Middleburg (4C)	0	0.0%	0	0	0.0%	0
5. GenXurban	0	0.0%	0	0	0.0%	0
Comfortable Empty Nesters In Style (5B)	0	0.0%	0	0	0.0%	0
Parks and Rec (5C)	0	0.0%	0	0	0.0%	0
Rustbelt Traditions (5D)	0	0.0%	0	0	0.0%	0
Midlife Constants (5E)	0	0.0%	0	0	0.0%	0
6. Cozy Country Living	0	0.0%	0	0	0.0%	0
Green Acres (6A)	0	0.0%	0	0	0.0%	0
Salt of the Earth (6B)	0	0.0%	0	0	0.0%	0
The Great Outdoors (6C)	0	0.0%	0	0	0.0%	0
Prairie Living (6D)	0	0.0%	0	0	0.0%	0
Rural Resort Dwellers (6E)	0	0.0%	0	0	0.0%	0
Heartland Communities (6F)	0	0.0%	0	0	0.0%	0
7. Ethnic Enclaves	2,584	8.8%	126	7,132	10.5%	130
Up and Coming Families (7A)	0	0.0%	0	0	0.0%	0
Urban Villages (7B)	2,126	7.2%	672	6,075	8.9%	604
American Dreamers (7C)	458	1.6%	105	1,057	1.6%	93
Barrios Urbanos (7D)	0	0.0%	0	0	0.0%	0
Valley Growers (7E)	0	0.0%	0	0	0.0%	0
Southwestern Families (7F)	0	0.0%	0	0	0.0%	0

Data Note: This report identifies neighborhood segments in the area, and describes the socioeconomic quality of the immediate neighborhood. The index is a comparison of the percent of households or Total Population 18+ in the area, by Tapestry segment, to the percent of households or Total Population 18+ in the United States, by segment. An index of 100 is the US average.

Source: Esri

March 10, 2017

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Tapestry Segmentation Area Profile

San Marcos City, CA
San Marcos City, CA (0668196)
Geography: Place

Prepared by Esri

Tapestry LifeMode Groups	2016 Households			2016 Adult Population		
	Number	Percent	Index	Number	Percent	Index
Total:	29,473	100.0%		68,161	100.0%	
8. Middle Ground	4,027	13.7%	125	8,497	12.5%	122
City Lights (8A)	103	0.3%	24	316	0.5%	31
Emerald City (8B)	0	0.0%	0	0	0.0%	0
Bright Young Professionals	2,636	8.9%	402	5,597	8.2%	409
Downtown Melting Pot (8D)	0	0.0%	0	0	0.0%	0
Front Porches (8E)	0	0.0%	0	0	0.0%	0
Old and Newcomers (8F)	1,288	4.4%	188	2,584	3.8%	188
Hardscrabble Road (8G)	0	0.0%	0	0	0.0%	0
9. Senior Styles	4,419	15.0%	260	8,577	12.6%	252
Silver & Gold (9A)	0	0.0%	0	0	0.0%	0
Golden Years (9B)	201	0.7%	51	477	0.7%	59
The Elders (9C)	1,038	3.5%	484	1,665	2.4%	415
Senior Escapes (9D)	1,599	5.4%	597	3,377	5.0%	585
Retirement Communities (9E)	1,581	5.4%	441	3,058	4.5%	440
Social Security Set (9F)	0	0.0%	0	0	0.0%	0
10. Rustic Outposts	0	0.0%	0	0	0.0%	0
Southern Satellites (10A)	0	0.0%	0	0	0.0%	0
Rooted Rural (10B)	0	0.0%	0	0	0.0%	0
Diners & Miners (10C)	0	0.0%	0	0	0.0%	0
Down the Road (10D)	0	0.0%	0	0	0.0%	0
Rural Bypasses (10E)	0	0.0%	0	0	0.0%	0
11. Midtown Singles	0	0.0%	0	0	0.0%	0
City Strivers (11A)	0	0.0%	0	0	0.0%	0
Young and Restless (11B)	0	0.0%	0	0	0.0%	0
Metro Fusion (11C)	0	0.0%	0	0	0.0%	0
Set to Impress (11D)	0	0.0%	0	0	0.0%	0
City Commons (11E)	0	0.0%	0	0	0.0%	0
12. Hometown	0	0.0%	0	0	0.0%	0
Family Foundations (12A)	0	0.0%	0	0	0.0%	0
Traditional Living (12B)	0	0.0%	0	0	0.0%	0
Small Town Simplicity (12C)	0	0.0%	0	0	0.0%	0
Modest Income Homes (12D)	0	0.0%	0	0	0.0%	0
13. Next Wave	4,207	14.3%	366	10,676	15.7%	350
International Marketplace	1,042	3.5%	287	2,600	3.8%	275
Las Casas (13B)	537	1.8%	246	1,349	2.0%	194
NeWest Residents (13C)	2,628	8.9%	1,147	6,727	9.9%	1,146
Fresh Ambitions (13D)	0	0.0%	0	0	0.0%	0
High Rise Renters (13E)	0	0.0%	0	0	0.0%	0
14. Scholars and Patriots	0	0.0%	0	0	0.0%	0
Military Proximity (14A)	0	0.0%	0	0	0.0%	0
College Towns (14B)	0	0.0%	0	0	0.0%	0
Dorms to Diplomas (14C)	0	0.0%	0	0	0.0%	0
Unclassified (15)	0	0.0%	0	0	0.0%	0

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Source: Esri

March 10, 2017

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Tapestry Segmentation Area Profile

San Marcos City, CA
San Marcos City, CA (0668196)
Geography: Place

Prepared by Esri

Tapestry Urbanization	2016 Households			2016 Adult Population		
	Number	Percent	Index	Number	Percent	Index
Total:	29,473	100.0%		68,161	100.0%	
1. Principal Urban Center	2,628	8.9%	128	6,727	9.9%	149
Laptops and Lattes (3A)	0	0.0%	0	0	0.0%	0
Metro Renters (3B)	0	0.0%	0	0	0.0%	0
Trendsetters (3C)	0	0.0%	0	0	0.0%	0
Downtown Melting Pot (8D)	0	0.0%	0	0	0.0%	0
City Strivers (11A)	0	0.0%	0	0	0.0%	0
NeWest Residents (13C)	2,628	8.9%	1,147	6,727	9.9%	1,146
Fresh Ambitions (13D)	0	0.0%	0	0	0.0%	0
High Rise Renters (13E)	0	0.0%	0	0	0.0%	0
2. Urban Periphery	6,902	23.4%	139	16,994	24.9%	139
Pacific Heights (2C)	0	0.0%	0	0	0.0%	0
Rustbelt Traditions (5D)	0	0.0%	0	0	0.0%	0
Urban Villages (7B)	2,126	7.2%	672	6,075	8.9%	604
American Dreamers (7C)	458	1.6%	105	1,057	1.6%	93
Barrios Urbanos (7D)	0	0.0%	0	0	0.0%	0
Southwestern Families (7F)	0	0.0%	0	0	0.0%	0
City Lights (8A)	103	0.3%	24	316	0.5%	31
Bright Young Professionals (8C)	2,636	8.9%	402	5,597	8.2%	409
Metro Fusion (11C)	0	0.0%	0	0	0.0%	0
Family Foundations (12A)	0	0.0%	0	0	0.0%	0
Modest Income Homes (12D)	0	0.0%	0	0	0.0%	0
International Marketplace (13A)	1,042	3.5%	287	2,600	3.8%	275
Las Casas (13B)	537	1.8%	246	1,349	2.0%	194
3. Metro Cities	2,869	9.7%	53	5,642	8.3%	49
In Style (5B)	0	0.0%	0	0	0.0%	0
Emerald City (8B)	0	0.0%	0	0	0.0%	0
Front Porches (8E)	0	0.0%	0	0	0.0%	0
Old and Newcomers (8F)	1,288	4.4%	188	2,584	3.8%	188
Hardscrabble Road (8G)	0	0.0%	0	0	0.0%	0
Retirement Communities (9E)	1,581	5.4%	441	3,058	4.5%	440
Social Security Set (9F)	0	0.0%	0	0	0.0%	0
Young and Restless (11B)	0	0.0%	0	0	0.0%	0
Set to Impress (11D)	0	0.0%	0	0	0.0%	0
City Commons (11E)	0	0.0%	0	0	0.0%	0
Traditional Living (12B)	0	0.0%	0	0	0.0%	0
College Towns (14B)	0	0.0%	0	0	0.0%	0
Dorms to Diplomas (14C)	0	0.0%	0	0	0.0%	0

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Source: Esri

March 10, 2017

ESRI

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Tapestry Segmentation Area Profile

San Marcos City, CA
San Marcos City, CA (0668196)
Geography: Place

Prepared by Esri

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Total:	29,473	100.0%		68,161	100.0%	
4. Suburban Periphery	15,475	52.5%	167	35,421	52.0%	161
Top Tier (1A)	0	0.0%	0	0	0.0%	0
Professional Pride (1B)	0	0.0%	0	0	0.0%	0
Boomburbs (1C)	6,813	23.1%	1,497	15,616	22.9%	1,400
Savvy Suburbanites (1D)	1,402	4.8%	160	3,207	4.7%	147
Exurbanites (1E)	25	0.1%	4	56	0.1%	4
Urban Chic (2A)	0	0.0%	0	0	0.0%	0
Pleasantville (2B)	2,025	6.9%	309	4,880	7.2%	289
Enterprising Professionals (2D)	0	0.0%	0	0	0.0%	0
Soccer Moms (4A)	2,645	9.0%	315	6,368	9.3%	308
Home Improvement (4B)	1,326	4.5%	262	3,152	4.6%	251
Comfortable Empty Nesters (5A)	0	0.0%	0	0	0.0%	0
Parks and Rec (5C)	0	0.0%	0	0	0.0%	0
Midlife Constants (5E)	0	0.0%	0	0	0.0%	0
Up and Coming Families (7A)	0	0.0%	0	0	0.0%	0
Silver & Gold (9A)	0	0.0%	0	0	0.0%	0
Golden Years (9B)	201	0.7%	51	477	0.7%	59
The Elders (9C)	1,038	3.5%	484	1,665	2.4%	415
Military Proximity (14A)	0	0.0%	0	0	0.0%	0
5. Semirural	1,599	5.4%	58	3,377	5.0%	55
Middleburg (4C)	0	0.0%	0	0	0.0%	0
Heartland Communities (6F)	0	0.0%	0	0	0.0%	0
Valley Growers (7E)	0	0.0%	0	0	0.0%	0
Senior Escapes (9D)	1,599	5.4%	597	3,377	5.0%	585
Down the Road (10D)	0	0.0%	0	0	0.0%	0
Small Town Simplicity (12C)	0	0.0%	0	0	0.0%	0
6. Rural	0	0.0%	0	0	0.0%	0
Green Acres (6A)	0	0.0%	0	0	0.0%	0
Salt of the Earth (6B)	0	0.0%	0	0	0.0%	0
The Great Outdoors (6C)	0	0.0%	0	0	0.0%	0
Prairie Living (6D)	0	0.0%	0	0	0.0%	0
Rural Resort Dwellers (6E)	0	0.0%	0	0	0.0%	0
Southern Satellites (10A)	0	0.0%	0	0	0.0%	0
Rooted Rural (10B)	0	0.0%	0	0	0.0%	0
Diners & Miners (10C)	0	0.0%	0	0	0%	0
Rural Bypasses (10E)	0	0.0%	0	0	0.0%	0
Unclassified (15)	0	0.0%	0	0	0.0%	0

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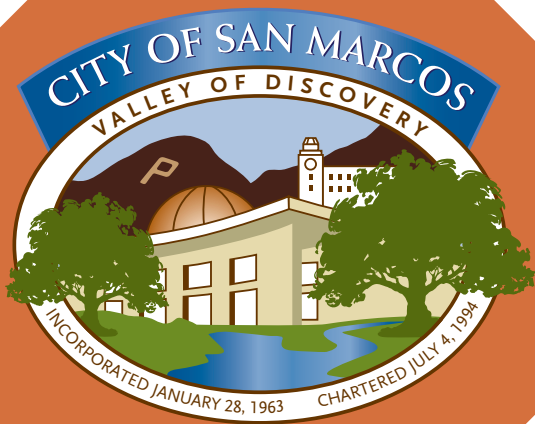
SOURCE: Esri

March 10, 2017

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INTERNATIONAL

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