

**RETAIL MARKET ANALYSIS FOR THE
SANTA PAULA EAST GATEWAY PROJECT**

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Prepared for:

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TABLE OF CONTENTS

I.	INTRODUCTION.....	1
II.	OVERVIEW OF EXISTING COMMERCIAL RETAIL MARKET IN SANTA PAULA TRADE AREA	4
III.	EXECUTIVE SUMMARY.....	6
	III-A. Demographic Projections.....	6
	III-B. Retail Demand Potential	6
	III-C. Potential Impacts to Downtown Areas.....	7
	III-D. Cumulative Impacts of Projects Planned in Santa Paula Retail Trade Area	8
	III-E. Potential for Urban Decay.....	10
IV.	RETAIL DEMAND ANALYSIS METHODOLOGY	11
	IV-A. Market Area Boundaries	11
	IV-B. Population and Income Levels	13
	IV-C. Retail Sales Demand	14
	IV-D. Distribution of Retail Expenditures	15
	IV-E. Capture Rate Analysis	16
	IV-F. Potential Retail Sales Volumes	17
	IV-G. Supportable Retail Space	19
APPENDIX A:	RETAIL DEMAND MODEL – SANTA PAULA RETAIL TRADE AREA (BASELINE SCENARIO)	
APPENDIX B:	RETAIL DEMAND MODEL – SANTA PAULA RETAIL TRADE AREA (CONSERVATIVE SCENARIO)	
APPENDIX C:	RETAIL INVENTORY – SANTA PAULA RETAIL TRADE AREA	
APPENDIX D:	MAJOR SHOPPING CENTERS – VENTURA COUNTY	
APPENDIX E:	ANNEXATION AREA AND SPECIFIC PLAN AREA MAPS	

I. INTRODUCTION

This report evaluates the market demand for the retail commercial development proposed in the Santa Paula East Gateway Project. The East Gateway Project includes the proposed annexation of unincorporated territory located adjacent to the eastern boundary of the City of Santa Paula and the adoption of the East Gateway Specific Plan for a portion of the area proposed for annexation as shown in Figure E-1 (Appendix E).

The East Gateway Specific Plan Area would also include some vacant property currently located within the City to provide for comprehensive planning of the Specific Plan Area, which is anticipated to develop within the next five years. The Specific Plan Area includes approximately 33 acres of undeveloped land south of SR-126 and 2 acres of land north of SR-126. The proposed Specific Plan would allow development of up to 310,000 square feet of retail commercial development.

The majority of the remainder of the area being annexed would be pre-zoned for commercial and light industrial use by the City of Santa Paula in conformance with the City's current General Plan Land Use designation for this area. No specific development projects have been identified for this portion of the annexation area at this time. Development of vacant land and redevelopment of developed parcels could take place over time as permitted by the General Plan and proposed zoning. The East Gateway Project is located within the East Area 2 Planning Area as defined in the City of Santa Paula General Plan. The General Plan currently permits development of up to 544,500 sq. ft. of highway oriented commercial uses in the East Area 2 Planning Area along with light industrial uses. Projections of the type and amount of new commercial and light industrial development that would be permitted by the proposed zoning are shown on Figure E-2 (Appendix E). Based on the location, size, configuration and other property characteristics, additional retail commercial development is also anticipated in Subarea C. This subarea consists of two large undeveloped parcels and several smaller adjacent parcels that make up a 26 acre site that could support development of up to 250,000 square feet of retail commercial space. This market study is being prepared to accomplish two main tasks:

1. To provide a forecast of the amounts, types and timing of retail space likely to be developed within the three subareas. Based on this forecast, this analysis provides taxable retail sales assumptions to be used as inputs in to the fiscal impact analysis (FIA) being prepared by Stanley R. Hoffman Associates (SRHA).
2. To provide a basis for evaluating the potential economic ("urban decay") impacts that future retail development within the East Gateway Project would have on existing retail businesses in the trade area (including potential impacts to Downtown Santa Paula).

Overview of Methodology

For purposes of estimating retail demand by retail category, this analysis considers a trade area that includes the cities of Santa Paula and Fillmore, along with the surrounding unincorporated portion of Ventura County. The analysis projects total resident purchasing power within this trade area, and uses this projection of total demand as the basis for determining the potential timing of future retail development in the East Gateway Project Area.

The study methodology includes the following major steps:

1. Estimate the current potential demand for general merchandise, apparel, furniture, specialty, grocery, restaurant, building/hardware, auto parts, and gasoline sales in the trade area, based on existing demographics;
2. Project the portion of this total trade area demand that could realistically be expected to be captured by retail facilities in the City of Santa Paula (including the future annexation areas);
3. Compare this “potential” demand to the actual volume of retail sales in the City of Santa Paula, based on taxable sales data from the California State Board of Equalization (SBOE);
4. Estimate the volumes of additional general merchandise, apparel, furniture, specialty, grocery, and restaurant sales that Santa Paula could support in future years (through 2025), based on the difference between potentially supportable sales and the existing sales volumes in the City;
5. Estimate the square footage of new retail space that could be supported, by translating potential new retail sales (determined in step 4) into supportable square feet of retail space.

Description of Trade Area

For purposes of this study, the trade area has been defined as a polygon that includes the Cities of Santa Paula and Fillmore, as well as adjacent unincorporated areas of Ventura County. The trade area boundaries are as follows:

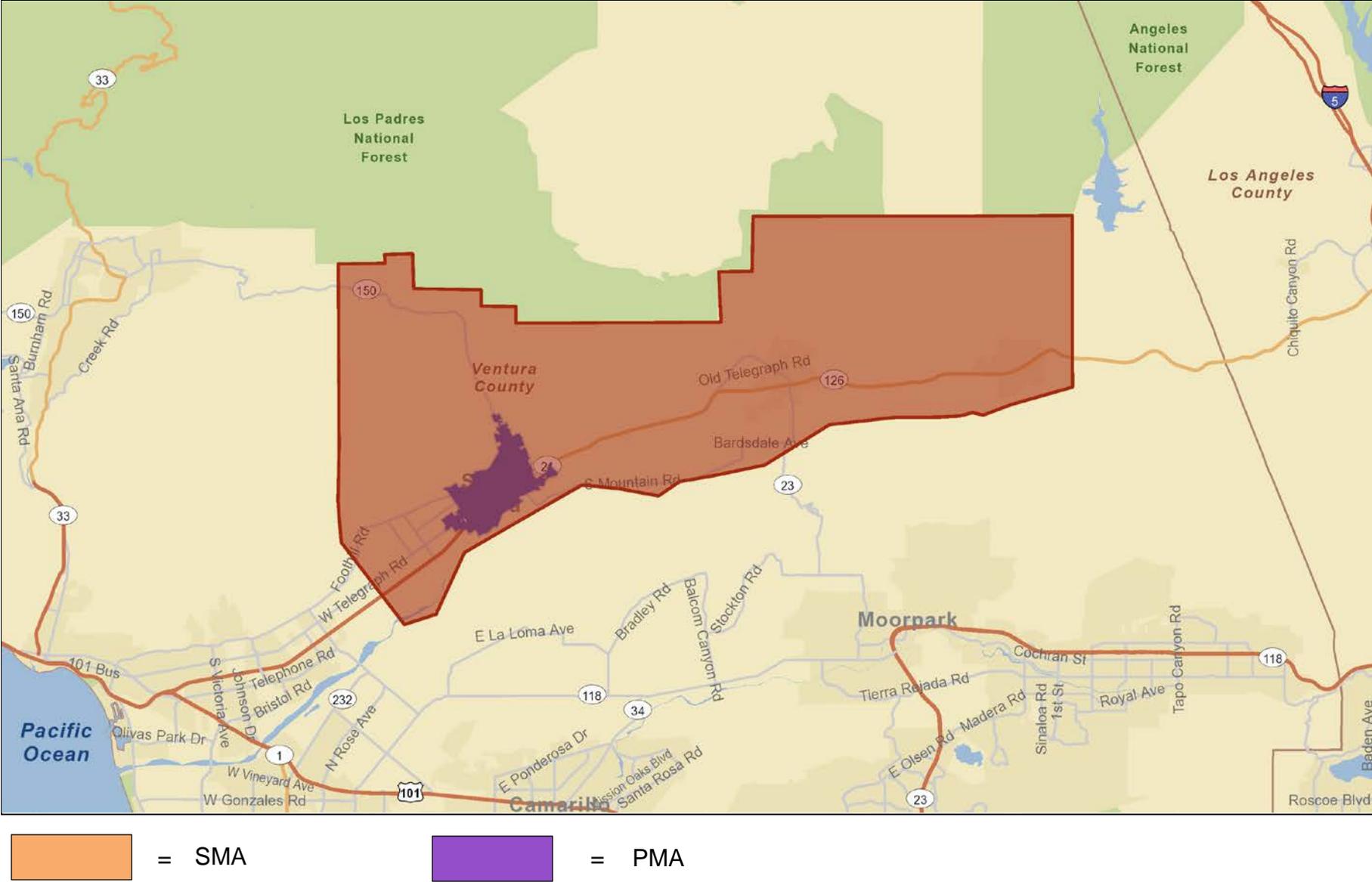
- West – Generally runs along Olive Road/Foothill Road/Wheeler Canyon Road.
- North – Generally runs along the border of the Los Padres National Forest.
- East – A straight line approximately at the half-way point between the community of Piru and the Ventura County line.
- South – Generally runs along the mountains dividing the Santa Paula/Fillmore region from urban areas (such as Moorpark) north of Highway 118. The eastern portion of the boundary generally runs along Guiberson Road, while the western portion generally runs along South Mountain Road.

The entire trade area is broken down into the following two trade areas:

- Primary Market Area (PMA): City of Santa Paula; and
- Secondary Market Area (SMA): The remaining portion of the polygon, excluding the City of Santa Paula.

Additional information on the trade area design is provided in Section IV-A on page 11. The trade area boundaries are shown on Figure I-1 on the following page.

Figure I-1: Santa Paula Retail Trade Area



II. OVERVIEW OF EXISTING COMMERCIAL RETAIL MARKET IN SANTA PAULA TRADE AREA

As part of this analysis, in August 2011 TNDG completed an inventory of existing retail space in shopping centers and in the downtown areas of the cities of Santa Paula and Fillmore. The main purpose of this task was to provide a quantitative and qualitative measure of the overall “health” of the retail climate in the trade area. A detailed summary of the inventory is provided in Appendix C.

The retail environment in the trade area is largely characterized by neighborhood shopping centers, which are anchored by supermarkets, “dollar” discount stores, and drug stores, in addition to some smaller “strip center” retail developments. In Fillmore, there are two neighborhood centers located across from one another on the corner of Ventura Street and “A” Street. The 70,000 square foot shopping center on the northwest corner of Ventura Street and “A” Street is anchored by a Super A Foods supermarket and a Dollar Tree store. The 105,000 square foot Baldwin Center is anchored by a Vons supermarket and a Rite Aid drug store. In Santa Paula, the 177,000 square foot Santa Paula Shopping Center, located on the northwest corner of Harvard Boulevard and Steckel Drive, is anchored by a Vons supermarket, a CVS drug store, and a Big Lots store. The 59,000 square foot shopping center on the southeast corner of Palm Avenue and East Harvard Boulevard is anchored by a Tresieras supermarket.

As shown on Table II-1, below, the total inventory of shopping center and downtown retail space in Fillmore and Santa Paula is estimated at approximately 794,700 square feet. Of this total, approximately 500,000 square feet, or 63% of the inventory, is located in the City of Santa Paula. The trade area’s retail space is currently 91.2% occupied. The overall vacancy rate (8.8%) is within the range (5% to 10%) generally considered to be reflective of a healthy retail market.

**Table II-1:
Inventory of Existing Retail Development
Shopping Centers and Downtown Areas
Santa Paula and Fillmore**

Retail Category	Square Feet
Clothing and Clothing Accessories	46,438
General Merchandise	161,071
Home Furnishings and Appliances	8,206
Other/Specialty	86,606
Food and Beverage	142,200
Food Services and Drinking Places	72,743
Bldg. Matrl. and Garden Equip. and Supplies	21,269
Auto Parts, Accessories and Tire Stores	4,688
Services	181,295
Vacant	70,206
Total	794,721

Source: TNDG; Appendix C.

Existing Conditions – Downtown Areas

The downtown areas of Santa Paula and Fillmore include an established community of independent, small businesses such as apparel, furniture, and jewelry stores; restaurants; and local services. Based on findings from this field survey, the current vacancy rates in the downtown areas of Fillmore and Santa Paula are approximately 13.0% and 15.2%, respectively. Although these vacancy rates are somewhat above the range generally considered to be reflective of a healthy retail market, there are no visible signs of urban decay (e.g., boarded up windows, extensive graffiti, landscape neglect, etc.) in the downtown areas. In addition, the estimated vacancy rate may be slightly overstated since all storefront vacant space in the downtown has been counted as retail space. Given the presence of some office/non-retail space in the downtown areas, it is possible that some of the vacant space will ultimately be marketed for office or other non-retail uses (in which case it would be excluded from the retail vacancy rate calculations, resulting in a lower overall vacancy rate).

III. EXECUTIVE SUMMARY

Based on the data and analysis presented in this report, TNDG concludes that the proposed commercial-retail components would not result in urban decay in the evaluated trade area. This conclusion applies both when the project is considered by itself and when it is considered in combination with the cumulative projects included in this study.

It is TNDG's conclusion that the commercial-retail components as proposed will not have significant economic impacts on existing retailers. The analysis supporting this conclusion is summarized in Sections III-A through III-C, with the study methodology documented in Section IV.

III-A. DEMOGRAPHIC PROJECTIONS

This analysis provides two sets of retail demand projections:

1. A *baseline* scenario which projects future demand based on population projections for the trade area that have been provided by the Southern California Association of Governments (SCAG)¹; and
2. A *conservative* scenario which projects future demand under the assumption that future population growth would be limited to the new residents associated with the proposed residential development in East Area One Annexation. That is, this scenario assumes that the residential development proposed in East Area One Annexation will be the *only* future residential development in the trade area through 2025.

III-B. RETAIL DEMAND POTENTIAL

As described above in Section II, the retail inventory in the trade area is largely limited to a few neighborhood shopping centers anchored by supermarkets and drug stores. Thus, given the lack of a regional-serving shopping center or other "big box" retail tenants, the trade area currently experiences a significant amount of retail sales leakage in a number of retail categories. As a result of this existing retail sales leakage, as shown in Table III-1 and Table III-2 on the following page, the City could currently support approximately 424,900 square feet of new retail space². In addition, due to continued population growth in the market, the City is projected to be able to support approximately 633,900 (conservative scenario) to 698,800 (baseline scenario) square feet of new retail space by 2025. These demand estimates indicate that there would be more than sufficient demand to support the proposed commercial-retail development in the East Gateway Project Area. In fact, support for full buildout of the proposed retail development would be reached sometime between 2013 (conservative scenario)³ and 2019 (baseline scenario), as shown in Table III-1 and Table III-2.

Most importantly, given the existing retail sales leakage, a significant portion (approximately 75%) of the proposed retail development in the East Gateway Project is already supportable

¹These projections were released in March 2010 as a draft update of SCAG's "Integrated Growth Forecast". See Section IV-B for further detail.

²The indicated amount of "currently" supportable new retail space is based on the retail purchases that trade area residents currently make in adjacent communities (i.e., Ventura, Oxnard, etc.). It is recognized that few national retail chains have been expanding during the past several years. Thus, as a practical matter, the theoretical demand indicated in this analysis is unlikely to translate into actual development until the economy more fully recovers.

³Approximately 99% of the proposed space (555,445 sq. ft. / 560,000 sq. ft.) would be supportable in 2013.

based on existing demographics. This indicates that a most of the demand for the proposed retail space is not dependent on future population growth; rather, the proposed development would recapture a significant amount of the existing resident retail demand that is currently leaving the trade area.

**Table III-1:
Potential Demand for New Retail Space
City of Santa Pala
BASELINE DEMOGRAPHIC PROJECTIONS**

Retail Category	2011	2013	2017	2019	2021	2025
GAFO 1/	229,203	287,250	313,743	327,663	337,930	350,692
Food and Beverage	10,048	29,816	39,178	44,106	47,615	51,604
Food Services and Drinking Places	35,504	53,759	62,724	67,453	70,705	74,051
Bldg. Matrl. & Garden Equip. & Supplies	97,648	115,832	124,089	128,426	131,641	135,684
Automotive Parts	9,969	13,243	14,779	15,587	16,168	16,844
Services Space @ 10% of Total Space	42,486	55,545	61,613	64,804	67,118	69,875
Total	424,857	555,445	616,126	648,039	671,176	698,750

Source: TNDG, Section IV, Tables IV-1 to IV-12.

Notes: 1/ GAFO includes General Merchandise, Apparel, Furniture and Other (Specialty).

**Table III-2:
Potential Demand for New Retail Space
City of Santa Paula
CONSERVATIVE DEMOGRAPHIC PROJECTIONS**

Retail Category	2011	2013	2017	2019	2021	2025
GAFO 1/	229,203	274,647	285,501	292,364	303,429	316,459
Food and Beverage	10,048	25,372	30,142	33,159	38,022	43,749
Food Services and Drinking Places	35,504	49,510	54,933	58,362	63,889	70,399
Bldg. Matrl. & Garden Equip. & Supplies	97,648	111,904	115,169	117,233	120,562	124,482
Automotive Parts	9,969	12,514	13,257	13,728	14,486	15,378
Services Space @ 10% of Total Space	42,486	52,661	55,445	57,205	60,043	63,385
Total	424,857	526,608	554,446	572,051	600,432	633,852

Source: TNDG, Appendix B, Tables B-1 to B-14.

Notes: 1/ GAFO includes General Merchandise, Apparel, Furniture and Other (Specialty).

III-C. POTENTIAL IMPACTS TO DOWNTOWN AREAS

TNDG’s experience in evaluating the impacts of big box retailers on small, independent merchants throughout southern and central California suggests that the impacts vary widely depending on the context. Clearly, there are examples of small businesses that have been unable to compete with big box stores. There are also prominent examples of traditional downtown areas that have been able to carve out specialized “niches” and continue to thrive despite the entry of big box competitors. Generally speaking, the difference in results can be explained by three factors:

1. The amount of resident demand for retail sales in the market area (i.e., whether the big box stores derive their sales from residual demand or “leakage” versus diverting sales from existing local merchants);
2. The degree to which trends in the traditional downtown areas were on a positive or negative path prior to the entry of the big box competitors (i.e., if an established trend of decline is already in evidence, disinvestment from an area is likely to occur with or without new competition); and
3. The degree to which tenants in a downtown are selling goods directly comparable to those available at competitor big box stores.

Conclusion Regarding Significance of Impact: TNDG does not believe that the proposed commercial-retail components, by themselves, will have a significant impact on the Santa Paula and Fillmore downtown areas. TNDG bases this conclusion on the following:

- Residual demand is anticipated to be sufficient to support the project without diverting sales from existing GAFO stores or restaurants.
- Small merchants in the downtown already face big box competition from shopping centers in neighboring jurisdictions outside of the trade area. As documented in Section IV, the trade area is currently experiencing a significant amount of retail sales leakage to these shopping centers outside of the trade area. Thus, the type of retail development proposed in the East Gateway Project Area will likely re-capture a significant portion of this existing leakage, rather than diverting sales from downtown retailers.
- Although the downtown areas’ existing vacancy rates at 13.0% and 15.2% are somewhat above the “normal vacancy” rate for relatively healthy retail markets (usually 5%-10%), and there are no visible indications of urban decay (i.e., dilapidated buildings or marginal uses).
- The downtown has a strong representation of boutique retail, eating and drinking establishments, and service-based businesses that offer a mix of merchandise and services which are not directly comparable to the type of goods available at the type of big box stores that would locate at the proposed project.

III-D. CUMULATIVE IMPACTS OF PROJECTS PLANNED IN SANTA PAULA RETAIL TRADE AREA

Whereas the above sections examine potential impacts strictly related to the proposed commercial-retail components in the East Gateway Project, this section evaluates the cumulative impacts to the market based on all known pending retail development/reuse projects (including the East Gateway Project) in the retail trade area. At the time of preparation of this study, the neighborhood commercial-retail space permitted by the approved East Area 1 Specific Plan, located immediately north of the East Gateway Project Area, is the only other known planned and/or pending commercial retail-project in the trade area. While the East Area 1 Specific Plan is already approved, no plans or schedule for development of this neighborhood serving retail commercial development have been identified at this time. Table III-3, on the following page, provides the combined square footage of the proposed commercial-retail space for both annexation areas.

As shown on the table, the commercial retail components in the two annexation areas would total 670,000 square feet. The majority of this total, approximately 84%, is accounted for in the East Gateway Project Area.

**Table III-3:
Planned and Pending Retail Projects
Santa Paula Retail Trade Area**

Project	Location	Total Square Feet	Status
East Gateway Project	Santa Paula (Telegraph Hwy)	310,000	Proposed
East Gateway Project – Subarea C	Santa Paula (Telegraph Rd)	250,000	Projected
<i>Subtotal</i>		<i>560,000</i>	
East Area 1 Specific Plan– Neighborhood Retail	Santa Paula	90,000	Planned
East Area 1 Specific Plan – Support Retail	Santa Paula	20,000	Planned
<i>Subtotal</i>		<i>110,000</i>	
GRAND TOTAL		670,000	

Cumulative Impacts

Within the evaluated trade area, demand for new retail space is projected to reach approximately 671,200 in 2021 (see Table III-1 above), suggesting that buildout of the commercial-retail components in both annexation areas would be fully supportable by that year. Under the conservative scenario, there would be support for approximately 95% of the total proposed space by 2025. Although the market would be slightly overbuilt under this scenario, the demographic projections are very conservative, in that they only account for the planned residential development in the East Area 1 Specific Plan Area. Nevertheless, if population growth did follow the conservative projections, the amount of neighborhood retail space in East Area 1 would likely be slightly scaled back to account for the reduced level of demand. Under the conservative scenario, there would be sufficient demand to support approximately 73,900 square feet of new retail space in the East Area 1 Specific Plan Area by 2025⁴.

⁴ As shown on Table III-2, there would be demand for approximately 633,900 square feet of new retail space in 2025 under the conservative scenario. After deducting the 560,000 square feet of space planned in the East Gateway Project Area, there would be residual demand for approximately 73,900 square feet (633,900 – 560,000 = 73,900).

III-E. POTENTIAL FOR URBAN DECAY

As discussed in Sections III-B through III-D above, there are no significant economic impacts projected under the project-specific and cumulative analyses. Given the existing retail sales leakage in the trade area, the proposed commercial retail space would capture – by offering shopping opportunities currently not available in the trade area – a significant amount of retail sales currently being “lost” to other jurisdictions outside of the trade area. This re-capturing of existing retail sales leakage, along with the continued growth in retail demand, would be sufficient to support the planned and pending retail space in the trade area. Thus, TNDG believes that it is unlikely that the retail commercial components in the East Gateway Project (and combined with the East Area 1 Specific Plan under the cumulative scenario), would result in economic impacts to existing stores in the trade area, and that it is therefore unlikely that any existing retail stores will be forced to close due to the project.

IV. RETAIL DEMAND ANALYSIS METHODOLOGY

This section examines potential retail demand associated with the population residing in the market area that would be served by the proposed retail development in the East Gateway Project. The analysis projects future retail demand of residents in Santa Paula as well as the resident demand of surrounding communities that would shop at the proposed retail facilities.

IV-A. MARKET AREA BOUNDARIES

For purposes of this study, the trade area has been defined as a polygon that includes the Cities of Santa Paula and Fillmore, and adjacent unincorporated areas of Ventura County. The trade area boundaries have been defined in terms of the polygon shown on Figure IV-1 on the following page. The boundaries are as follows:

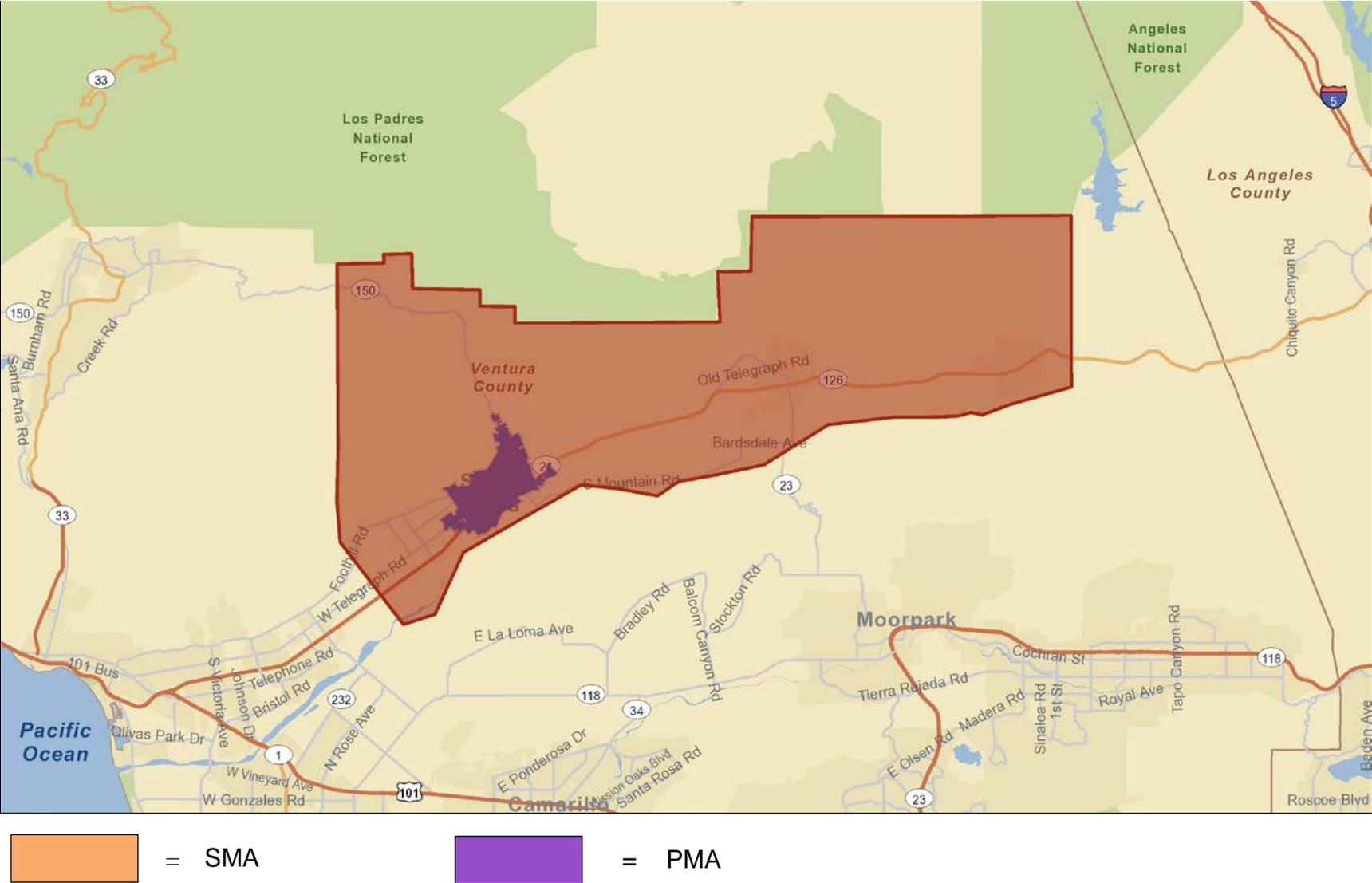
- West – Generally runs along Olive Road/Foothill Road/Wheeler Canyon Road.
- North – Generally runs along the border of the Los Padres National Forest.
- East – A straight line approximately at the half-way point between the community of Piru and the Ventura County line.
- South – Generally runs along the mountains dividing the Santa Paula/Fillmore region from urban areas (such as Moorpark) north of Highway 118. The eastern portion of the boundary generally runs along Guiberson Road, while the western portion generally runs along South Mountain Road.

The entire trade area is broken down into the following two trade areas:

- Primary Market Area (PMA): City of Santa Paula; and
- Secondary Market Area (SMA): The remaining portion of the polygon, excluding the City of Santa Paula.

The trade area boundaries were designed to account for the anticipated shopping patterns of residents, based in part on the location of existing competitive retail facilities and natural geographic borders. The northern and southern boundaries are natural borders, where the terrain turns to a national forest and a mountainous/hilly area, respectively. The western and eastern boundaries represent the dividing lines between where it would be more convenient for residents to shop at existing competitive shopping facilities in more urbanized portions of Ventura County (to the west) and in Los Angeles County (to the east). See Appendix D for a map and table of major “big box” retail facilities in the surrounding area of Ventura County.

Figure IV-1: Santa Paula Retail Trade Area



IV-B. POPULATION AND INCOME LEVELS

This analysis uses 2009 as the base year of the analysis, as this is the most recent year for which full-year taxable sales data are available from the SBOE (see Table IV-9).

Population growth in the PMA and SMA is projected on Table IV-1 as follows⁵:

**Table IV-1:
Population Projections by Year
Santa Paula Retail Trade Area**

Market Area	Estimated 2009 Population	Estimated 2011 Population	Projected 2013 Population	Projected 2017 Population	Projected 2019 Population	Projected 2021 Population	Projected 2025 Population
Primary Market Area (PMA)	29,249	29,368	30,435	32,686	33,873	34,690	35,530
Secondary Market Area (SMA)	22,164	22,315	22,945	24,257	24,941	25,517	26,449
Total	51,412	51,683	53,379	56,942	58,814	60,207	61,978

Source: ESRI; Southern California Association of Governments (SCAG); TNDG.

The current year (2011) population estimates were obtained from ESRI, a national demographic research services firm, based on recently released data from the 2010 Census. Projections from 2011 to 2025 are based on demographic projections prepared by the Southern California Association of Governments (SCAG) at the Traffic Analysis Zone (TAZ) level of geography. That is, we calculated the population growth rate from 2011 to 2025 for the TAZs which are located within the trade areas evaluated in this analysis. The most recent SCAG projections were released in March 2010 as a draft update of the “Integrated Growth Forecast”. As shown in Table IV-1 above, the trade area is expected to experience fairly modest growth over the study period. The projected annual growth rates are as follows:

Area	2011-2020	2020-2025
PMA	1.80%	0.60%
SMA	1.40%	0.90%

**Table IV-2:
Per Capita Income Levels
Santa Paula Retail Trade Area**

Market Area	2011 Per Capita Income
PMA	\$26,210
SMA	\$29,068

Source: ESRI, TNDG

The indicated per capita income estimates were obtained from ESRI and increased 47% by TNDG. The reason for this increase factor is that these income estimates are based on the “money income” definition of income utilized by the U.S. Census Bureau. This measure of

⁵ The population projections provided in Table IV-1, and the subsequent tables in this section, are based on the baseline scenario, as described in III-A. The alternative retail demand model based on the conservative scenario is provided in Appendix B.

income is narrower than the “personal income” definition used by the U.S. Department of Commerce, Bureau of Economic Analysis (BEA). The broader definition includes additional income sources such as fringe benefits (health insurance, retirement funding), imputed income (interest, rent), and direct payments to medical providers by governments. Personal income therefore represents a more complete gauge of a household’s economic status. According to the Center for the Continuing Study of the California Economy (CCSCE), personal income is the preferred measure for purposes of projecting a household’s purchasing power (i.e., retail demand). Thus, this analysis increases the ESRI estimates of money income by 47% to estimate per capita personal income⁶.

IV-C. RETAIL SALES DEMAND

The portion of total income spent on retail purchases varies by the income level of the individual household and also varies depending on the strength of the overall economy. In general, the percentage of income spent on retail goods decreases as income levels rise (more affluent households spend more on retail goods in *absolute* dollar terms, but less as a *percentage* of their total income).

To forecast the ratio of total trade area income likely to be spent on retail purchases, TNDG evaluated county level data for the period 1999 through 2009 (the latest 11-year period for which official income data are available from the BEA. In particular, TNDG calculated the ratio of total retail sales (based on data from SBOE⁷) to total aggregate income (per the BEA). At the countywide level, the ratio of retail sales to total income is estimated as follows for each year of the evaluation period:

**Table IV-3:
Total Retail Sales
As a Percentage of Aggregate Personal Income
Ventura County**

1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	11-Year Average
26.4%	26.6%	27.2%	27.6%	27.9%	27.8%	27.9%	26.3%	25.0%	22.8%	21.0%	26.4%

Source: TNDG, based on income data from BEA and retail sales data from SBOE.

Whereas the above data are based on countywide income levels, data from the National Consumer Expenditure Survey (CES) allow for evaluation of the variation in retail expenditures by household income level. Since income levels in the trade area are lower than the countywide average, it is expected that retail expenditures as a percentage of income are somewhat higher in the trade area. Based on an evaluation of the CES data for households with income levels comparable to those in the trade area and in the county as a whole, TNDG estimates that the retail-to-income ratio is approximately 1.9 to 3.0 percentage points higher in the SMA and PMA, respectively, compared to the countywide average estimate in the table

⁶ Per capita “personal income” is a full 47% higher than per capita “money income” in Ventura County, based on income data (for the period from 2005 through 2009) provided by the Bureau of Economic Analysis and the U.S. Census Bureau.

⁷ The SBOE provides data on *taxable* retail sales. In order to estimate total retail sales, TNDG multiplied *taxable* sales in the Food category by a factor of 3.0. This factor has been derived by TNDG based on numerous analyses of supermarket supply and demand in comparable communities throughout California, and based on data we have reviewed from the SBOE and selected supermarket chains.

above. Thus, TNDG's estimates of the retail-to-income ratio for the primary and secondary trade areas are shown on Table IV-4 as follows:

**Table IV-4:
Total Retail Sales**

Area	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	11-Year Average
PMA	29.8%	30.0%	30.7%	31.2%	31.6%	31.4%	31.5%	29.7%	28.2%	25.8%	23.7%	29.4%
SMA	28.8%	28.9%	29.6%	30.1%	30.4%	30.3%	30.3%	28.6%	27.2%	24.8%	22.8%	28.3%

Source: TNDG, based on BEA, SBOE and CES data.

The above data clearly show the effects of a strong economy from 2003 to 2006 and the severe recession beginning in 2008. To remain analytically conservative, TNDG's analysis assumes that the retail expenditure ratio for the trade area will remain at the recession-depressed level (2007-09 average) of 25.9% and 24.9%, respectively, in the PMA and SMA through 2012. In 2013, the retail expenditure ratio is projected to reach the long-term average level of 29.4% (PMA) and 28.3% (SMA) for the remainder of the forecast period. It is important to note that TNDG is projecting that the ratios will remain well below the 2003 peaks of 31.6% (PMA) and 30.4% (SMA).

**Table IV-5:
Income and Retail Demand
Santa Paula Retail Trade Area
in thousands of constant dollars**

Market Area	2009	2011	2013	2017	2019	2021	2025
PMA	\$766,601	\$769,722	\$797,682	\$856,684	\$887,802	\$909,206	\$931,224
SMA	\$644,255	\$648,665	\$666,955	\$705,096	\$724,977	\$741,743	\$768,808
Total Income	\$1,410,856	\$1,418,387	\$1,464,637	\$1,561,780	\$1,612,779	\$1,650,948	\$1,700,032
Percent of Income Spent on Retail Goods							
PMA	23.7%	25.9%	29.4%	29.4%	29.4%	29.4%	29.4%
SMA	22.8%	24.9%	28.3%	28.3%	28.3%	28.3%	28.3%
PMA	\$181,588	\$199,265	\$234,598	\$251,950	\$261,102	\$267,397	\$273,872
SMA	\$147,044	\$161,804	\$188,999	\$199,808	\$205,442	\$210,193	\$217,862
Total Retail Demand	\$328,632	\$361,069	\$423,597	\$451,758	\$466,544	\$477,589	\$491,734

Source: TNDG

IV-D. DISTRIBUTION OF RETAIL EXPENDITURES

Projected retail demand from market area residents is disaggregated into various retail categories based upon retail expenditure patterns observed in Ventura County. The basic distribution of retail sales by retail category is projected as follows in Table IV-6 on the following page.

**Table IV-6:
Distribution of Sales by Retail Category
Santa Paula Retail Trade Area**

Retail Category	Distribution
Shopper Goods:	
Clothing and Clothing Accessories	8.5%
General Merchandise	12.0%
Home Furnishings and Appliances	6.0%
Other/Specialty	10.0%
<i>Subtotal</i>	<i>36.5%</i>
Convenience Goods:	
Food and Beverage	19.0%
Food Services and Drinking Places	12.0%
<i>Subtotal</i>	<i>31.0%</i>
Heavy Commercial Goods:	
Bldg. Matrl. & Garden Equip. & Supplies	7.0%
Motor Vehicle and Parts Dealers	15.5%
Gasoline Stations	10.0%
<i>Subtotal</i>	<i>32.0%</i>
Total	100.0%

Source: SBOE; TNDG

IV-E. CAPTURE RATE ANALYSIS

Santa Paula's Projected Capture Rates of PMA Demand

Santa Paula's potential capture rates of PMA demand are projected to be relatively high due to the tendency of residents to shop relatively close to their homes, especially for convenience goods. Generally, it is reasonable to expect that residents will make the vast majority of their retail purchases locally, provided that a competitive mix of retail stores reflective of consumer needs is available. This is consistent with one of the findings from standard urban land use theory, which indicates, all else equal, the relative attractiveness of retail outlets decreases as travel time increases for the consumer⁸. Table IV-7, on the following page, shows the projected capture rates of PMA demand for each retail category.

Santa Paula is projected to potentially capture all of its resident (PMA) demand in the Food and Beverage (grocery), Food Services and Drinking (restaurant), and Heavy Commercial Goods categories, because of the strong propensity of consumers to purchase goods in these categories as close as possible to their residences⁹. The PMA capture rates in the "Shopper Goods" categories have been lowered to 85% to reflect the fact that the trade area does not

⁸ See, for example, Blair, John. *Urban & Regional Economics*. Irwin, 1991. Hoover, Edgar M. *An Introduction to Regional Economics*. Alfred A. Knopf, 1975. McCann, Phillip. *Urban and Regional Economics*. Oxford University Press, 2001.

⁹ The Motor Vehicle and Parts Dealers and Gasoline Stations categories capture rates are also projected at 100%. Although some resident purchases in these categories will likely occur outside of the city, an equal amount would likely be purchased by outside residents in the City. Thus, the effective capture rate of resident retail demand would be 100%.

have a full-scale regional shopping center; therefore, it is assumed that the area will always experience some level of retail “leakage” to other areas of Ventura County (e.g., Ventura, Oxnard, and Simi Valley) that have a larger array of retail facilities. Based on an analysis of a proprietary database of shopping centers in a major metropolitan area, TNDG has determined that approximately 15% of retail space is in regional or super-regional centers (defined here as centers with 600,000 square feet or more of gross leasable area) while the remaining 85% of the space is in community- and neighborhood-scale centers. Based on these data, we can assume that Santa Paula, in the absence of such a regional or super-regional center, *could be expected to realistically “capture” up to 85%* of PMA demand in the shopper goods categories. That is, based on the existing mix and supply of retail space, along with the proposed commercial-retail components in the East Gateway Project, Santa Paula could potentially capture up to 85% of PMA demand in the shopper goods categories.

Santa Paula’s Projected Capture Rates of SMA Demand

Santa Paula’s capture rates of SMA retail demand are projected to be lower than those for the PMA, given the longer distances that SMA residents need to travel to shop in Santa Paula. However, these are relatively conservative capture rates assumptions (i.e., they potentially could be higher), given that there is limited retail development in the SMA, and that Santa Paula would represent the nearest retail shopping destination with the development of the proposed retail commercial space as part of the East Gateway Project. The projected captures rates of SMA retail demand are also provided in Table IV-7 below.

**Table IV-7:
Potential Capture Rates of Trade Area Demand
Santa Paula Retail Trade Area**

Retail Category	Capture Rate	
	PMA	SMA
<u>Shopper Goods:</u>		
Clothing and Clothing Accessories	85.0%	65.0%
General Merchandise	85.0%	65.0%
Home Furnishings and Appliances	85.0%	65.0%
Other/Specialty	85.0%	65.0%
<u>Convenience Goods:</u>		
Food and Beverage	100.0%	30.0%
Food Services and Drinking Places	100.0%	40.0%
<u>Heavy Commercial Goods:</u>		
Bldg. Matrl. & Garden Equip. & Supplies	100.0%	85.0%
Motor Vehicle and Parts Dealers	100.0%	40.0%
Gasoline Stations	100.0%	40.0%

Source: TNDG

IV-F. POTENTIAL RETAIL SALES VOLUMES

Table IV-8, on the following page, projects the potential market area demand in the PMA for each retail category. As shown on the table, incremental demand through 2025 for retail sales in the PMA is projected to grow in proportion to increases in the trade area population.

**Table IV-8:
Potential Capture of Sales
City of Santa Paula
in thousands of constant dollars**

Retail Category	2009	2011	2013	2017	2019	2021	2025
Shopper Goods:							
Clothing and Clothing Accessories	\$21,244	\$23,337	\$27,392	\$29,243	\$30,215	\$30,933	\$31,824
General Merchandise	\$29,991	\$32,946	\$38,671	\$41,284	\$42,657	\$43,669	\$44,928
Home Furnishings and Appliances	\$14,996	\$16,473	\$19,335	\$20,642	\$21,328	\$21,835	\$22,464
Other/Specialty	\$24,993	\$27,455	\$32,226	\$34,403	\$35,547	\$36,391	\$37,440
Convenience Goods:							
Food and Beverage	\$42,883	\$47,083	\$55,347	\$59,260	\$61,320	\$62,786	\$64,454
Food Services and Drinking Places	\$28,849	\$30,886	\$36,363	\$39,052	\$40,471	\$41,446	\$42,450
Heavy Commercial Goods:							
Bldg. Matrl. & Garden Equip. & Supplies	\$21,460	\$23,576	\$27,667	\$29,525	\$30,501	\$31,224	\$32,134
Motor Vehicle and Parts Dealers	\$37,263	\$40,918	\$48,081	\$51,440	\$53,208	\$54,478	\$55,958
Gasoline Stations	\$24,041	\$26,399	\$31,020	\$33,187	\$34,328	\$35,147	\$36,102

Source: TNDG

Based on the demand estimates shown in Table IV-8, and taxable sales estimates for the City of Santa Paula provided by the SBOE, Table IV-9 provides a comparison of total market area demand with actual sales in each retail category.

**Table IV-9:
Comparison of Potential Demand with Actual Sales
City of Santa Paula
in thousands of constant dollars**

Retail Category	2009 Demand	2009 Sales	Expected Less Actual	Percent Actual/ Expected
Shopper Goods:				
GAFO 1/	\$91,224	\$31,449	\$59,775	34.47%
Convenience Goods:				
Food and Beverage 2/	\$42,883	\$48,680	(\$5,797)	113.52%
Food Services and Drinking Places	\$28,849	\$20,235	\$8,614	70.14%
Heavy Commercial Goods:				
Bldg. Matrl. & Garden Equip. & Supplies	\$21,460	\$1,605	\$19,855	7.48%
Motor Vehicle and Parts Dealers	\$37,263	\$19,111	\$18,152	51.29%
Gasoline Stations	\$24,041	\$21,154	\$2,887	87.99%
Total	\$82,764	\$41,870	\$40,894	50.59%

Source: TNDG; SBOE.

1/ GAFO includes General Merchandise, Apparel, Furniture and Other (Specialty).

2/ TNDG's analysis indicates that actual Food (supermarket) sales in the City of Santa Paula are somewhat greater than the level of demand estimated by TNDG's model. The higher-than-expected performance in the Food category is likely due to the lack of GAFO retailers in the City. That is, it is likely that local supermarkets are absorbing some non-food retail sales that would normally be made in major GAFO-type retailers (e.g., Target, Walmart, etc.). As these types of retailers begin to locate in the City, this slight supply/demand imbalance will likely disappear.

In subsequent years, potential retail sales in the City of Santa Paula are projected to grow in proportion to trade area population increases. Table IV-10, below, shows the projected growth in potential retail sales in Santa Paula over the next fifteen years.

**Table IV-10:
Total Potential Capture of Demand for New Retail Sales
City of Santa Paula
in thousands of constant dollars**

Retail Category	2011	2013	2017	2019	2021	2025
Shopper Goods:						
GAFO 1/	\$68,761	\$86,175	\$94,123	\$98,299	\$101,379	\$105,208
Convenience Goods:						
Food and Beverage	\$4,200	\$12,463	\$16,376	\$18,436	\$19,903	\$21,571
Food Services and Drinking Places	\$10,651	\$16,128	\$18,817	\$20,236	\$21,211	\$22,215
Heavy Commercial Goods:						
Bldg. Matrl. & Garden Equip. & Supplies	\$21,971	\$26,062	\$27,920	\$28,896	\$29,619	\$30,529
Motor Vehicle and Parts Dealers	\$21,807	\$28,970	\$32,329	\$34,097	\$35,367	\$36,847
Gasoline Stations	\$5,245	\$9,866	\$12,033	\$13,174	\$13,993	\$14,948
Total	\$110,663	\$153,601	\$173,679	\$184,242	\$191,854	\$200,788

Source: TNDG.

1/ GAFO includes General Merchandise, Apparel, Furniture and Other (Specialty).

IV-G. SUPPORTABLE RETAIL SPACE

Sales per Square Foot Standards

Projected sales volume requirements per square foot of retail space by retail category are derived from typical sales standards from the Urban Land Institute's (ULI's) Dollars & Cents Publication (2008 issue) and from typical sales per square foot data from representative stores in each retail category (as reported in annual 10-K reports).

**Table IV-11:
Sales per Square Foot Standards for Retail Space
Santa Paula Retail Trade Area**

Retail Category	Sales/ Square Foot
GAFO 1/	\$300
Food and Beverage	\$418
Food Services and Drinking Places	\$300
Bldg. Matrl. & Garden Equip. & Supplies	\$225
Automotive Parts	\$175

Source: TNDG, based on data published by ULI and from representative stores.

1/ GAFO includes General Merchandise, Apparel, Furniture and Other (Specialty).

Demand for New Retail Space

The sales per square foot standards are applied to the net demand numbers for each relevant retail category, as shown in Table IV-12 below. This calculation essentially converts potential sales volumes into supportable square feet of new retail space. Supportable development levels will increase in the future by virtue of anticipated growth of the population in the trade area (see Table IV-1). Based on an analysis of a proprietary database of shopping centers in a major metropolitan area, TNDG has determined that services space (e.g., dry cleaners, hair salons, banks, etc.) accounts for 10% to 25% of total shopping center space, depending on type of retail development (i.e., regional, community, neighborhood, etc.). To be analytically conservative, this analysis assumes that, on average, services space accounts for 10% of total space in typical shopping center settings.

**Table IV-12:
Potential Demand for New Retail Space
City of Santa Paula**

Retail Category	2011	2013	2017	2019	2021	2025
GAFO 1/	229,203	287,250	313,743	327,663	337,930	350,692
Food and Beverage	10,048	29,816	39,178	44,106	47,615	51,604
Food Services and Drinking Places	35,504	53,759	62,724	67,453	70,705	74,051
Bldg. Matrl. & Garden Equip. & Supplies	97,648	115,832	124,089	128,426	131,641	135,684
Automotive Parts 2/	9,969	13,243	14,779	15,587	16,168	16,844
Services Space @ 10% of Total Space	42,486	55,545	61,613	64,804	67,118	69,875
Total	424,857	555,445	616,126	648,039	671,176	698,750

Source: TNDG.

Notes: 1/ GAFO includes General Merchandise, Apparel, Furniture and Other (Specialty).

2/ Assumes that automotive parts stores account for 8% of sales in overall Automotive group category (based on countywide average, 2007-09, as reported by the SBOE).

APPENDIX A:

**RETAIL DEMAND ANALYSIS
SANTA PAULA RETAIL TRADE AREA**

**Table A-1
Population
Santa Paula Retail Trade Area**

Area	2009	2011	2013	2015	2017	2019	2021	2025
City of Santa Paula	29,249	29,368	30,435	31,540	32,686	33,873	34,690	35,530
Secondary Market Area	22,164	22,315	22,945	23,592	24,257	24,941	25,517	26,449
Total	51,412	51,683	53,379	55,132	56,942	58,814	60,207	61,978

Source: ESRI; U.S. Census; Southern California Association of Governments (SCAG); The Natelson Dale Group, Inc. (TNDG).

**Table A-2
Per Capita Income Projections
Santa Paula Retail Trade Area
In constant dollars**

	2009							
City of Santa Paula		\$26,210						
Secondary Market Area		\$29,068						
Annual Increase Factor		0.00%						
Area	2009	2011	2013	2015	2017	2019	2021	2025
City of Santa Paula	\$26,210	\$26,210	\$26,210	\$26,210	\$26,210	\$26,210	\$26,210	\$26,210
Secondary Market Area	\$29,068	\$29,068	\$29,068	\$29,068	\$29,068	\$29,068	\$29,068	\$29,068

Source: ESRI; TNDG.

Table A-3
Total Income and Potential Retail Sales Projections
Santa Paula Retail Trade Area
In thousands of constant dollars

	2009	2011	2013	2015	2017	2019	2021	2025
Percent of Income Spent on Retail Goods								
City of Santa Paula	23.7%	25.9%	29.4%	29.4%	29.4%	29.4%	29.4%	29.4%
Secondary Market Area	22.8%	24.9%	28.3%	28.3%	28.3%	28.3%	28.3%	28.3%
Area								
	2009	2011	2013	2015	2017	2019	2021	2025
Total Income:								
City of Santa Paula	\$766,601	\$769,722	\$797,682	\$826,657	\$856,684	\$887,802	\$909,206	\$931,224
Secondary Market Area	\$644,255	\$648,665	\$666,955	\$685,760	\$705,096	\$724,977	\$741,743	\$768,808
Total	\$1,410,856	\$1,418,387	\$1,464,637	\$1,512,417	\$1,561,780	\$1,612,779	\$1,650,948	\$1,700,032
Potential Retail Sales:								
City of Santa Paula	\$181,588	\$199,265	\$234,598	\$243,119	\$251,950	\$261,102	\$267,397	\$273,872
Secondary Market Area	\$147,044	\$161,804	\$188,999	\$194,329	\$199,808	\$205,442	\$210,193	\$217,862
Total	\$328,632	\$361,069	\$423,597	\$437,448	\$451,758	\$466,544	\$477,589	\$491,734

Source: TNDG

Table A-4
Distribution of Retail Sales by Retail Category
Santa Paula Retail Trade Area

Retail Category	%Distribution 2009	%Distribution 2011	%Distribution 2013	%Distribution 2015	%Distribution 2017	%Distribution 2019	%Distribution 2021	%Distribution 2025
<i>Shopper Goods:</i>								
Clothing and Clothing Accessories	8.5%	8.5%	8.5%	8.5%	8.5%	8.5%	8.5%	8.5%
General Merchandise	12.0%	12.0%	12.0%	12.0%	12.0%	12.0%	12.0%	12.0%
Home Furnishings and Appliances	6.0%	6.0%	6.0%	6.0%	6.0%	6.0%	6.0%	6.0%
Other/Specialty	10.0%	10.0%	10.0%	10.0%	10.0%	10.0%	10.0%	10.0%
Subtotal	36.5%	36.5%	36.5%	36.5%	36.5%	36.5%	36.5%	36.5%
<i>Convenience Goods:</i>								
Food and Beverage	19.0%	19.0%	19.0%	19.0%	19.0%	19.0%	19.0%	19.0%
Food Services and Drinking Places	12.0%	12.0%	12.0%	12.0%	12.0%	12.0%	12.0%	12.0%
Subtotal	31.0%	31.0%	31.0%	31.0%	31.0%	31.0%	31.0%	31.0%
<i>Heavy Commercial Goods:</i>								
Bldg. Matrl. and Garden Equip. and Supplies	7.0%	7.0%	7.0%	7.0%	7.0%	7.0%	7.0%	7.0%
Motor Vehicle and Parts Dealers	15.5%	15.5%	15.5%	15.5%	15.5%	15.5%	15.5%	15.5%
Gasoline Stations	10.0%	10.0%	10.0%	10.0%	10.0%	10.0%	10.0%	10.0%
Subtotal	32.5%	32.5%	32.5%	32.5%	32.5%	32.5%	32.5%	32.5%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Source: TNDG, based 2009 taxable sales reported by the State Board of Equalization (SBOE) for Ventura County.

Table A-5
Projected Demand for Retail Sales by Major Retail Category
City of Santa Paula
In thousands of constant dollars

Retail Category	2009	2011	2013	2015	2017	2019	2021	2025
<i>Shopper Goods:</i>								
Clothing and Clothing Accessories	\$15,435	\$16,938	\$19,941	\$20,665	\$21,416	\$22,194	\$22,729	\$23,279
General Merchandise	\$21,791	\$23,912	\$28,152	\$29,174	\$30,234	\$31,332	\$32,088	\$32,865
Home Furnishings and Appliances	\$10,895	\$11,956	\$14,076	\$14,587	\$15,117	\$15,666	\$16,044	\$16,432
Other/Specialty	\$18,159	\$19,927	\$23,460	\$24,312	\$25,195	\$26,110	\$26,740	\$27,387
Subtotal	\$66,280	\$72,732	\$85,628	\$88,738	\$91,962	\$95,302	\$97,600	\$99,963
<i>Convenience Goods:</i>								
Food and Beverage	\$34,502	\$37,860	\$44,574	\$46,193	\$47,871	\$49,609	\$50,805	\$52,036
Food Services and Drinking Places	\$21,791	\$23,912	\$28,152	\$29,174	\$30,234	\$31,332	\$32,088	\$32,865
Subtotal	\$56,292	\$61,772	\$72,725	\$75,367	\$78,105	\$80,942	\$82,893	\$84,900
<i>Heavy Commercial Goods:</i>								
Bldg. Matrl. and Garden Equip. and Supplies	\$12,711	\$13,949	\$16,422	\$17,018	\$17,637	\$18,277	\$18,718	\$19,171
Motor Vehicle and Parts Dealers	\$28,146	\$30,886	\$36,363	\$37,683	\$39,052	\$40,471	\$41,446	\$42,450
Gasoline Stations	\$18,159	\$19,927	\$23,460	\$24,312	\$25,195	\$26,110	\$26,740	\$27,387
Subtotal	\$59,016	\$64,761	\$76,244	\$79,014	\$81,884	\$84,858	\$86,904	\$89,008
Total	\$181,588	\$199,265	\$234,598	\$243,119	\$251,950	\$261,102	\$267,397	\$273,872

Source: TNDG

Table A-6
Projected Demand for Retail Sales by Major Retail Category
Secondary Market Area
In thousands of constant dollars

Retail Category	2009	2011	2013	2015	2017	2019	2021	2025
<i>Shopper Goods:</i>								
Clothing and Clothing Accessories	\$12,499	\$13,753	\$16,065	\$16,518	\$16,984	\$17,463	\$17,866	\$18,518
General Merchandise	\$17,645	\$19,416	\$22,680	\$23,319	\$23,977	\$24,653	\$25,223	\$26,143
Home Furnishings and Appliances	\$8,823	\$9,708	\$11,340	\$11,660	\$11,988	\$12,326	\$12,612	\$13,072
Other/Specialty	\$14,704	\$16,180	\$18,900	\$19,433	\$19,981	\$20,544	\$21,019	\$21,786
Subtotal	\$53,671	\$59,058	\$68,985	\$70,930	\$72,930	\$74,986	\$76,720	\$79,520
<i>Convenience Goods:</i>								
Food and Beverage	\$27,938	\$30,743	\$35,910	\$36,922	\$37,963	\$39,034	\$39,937	\$41,394
Food Services and Drinking Places	\$17,645	\$19,416	\$22,680	\$23,319	\$23,977	\$24,653	\$25,223	\$26,143
Subtotal	\$45,584	\$50,159	\$58,590	\$60,242	\$61,940	\$63,687	\$65,160	\$67,537
<i>Heavy Commercial Goods:</i>								
Bldg. Matrl. and Garden Equip. and Supplies	\$10,293	\$11,326	\$13,230	\$13,603	\$13,987	\$14,381	\$14,713	\$15,250
Motor Vehicle and Parts Dealers	\$22,792	\$25,080	\$29,295	\$30,121	\$30,970	\$31,843	\$32,580	\$33,769
Gasoline Stations	\$14,704	\$16,180	\$18,900	\$19,433	\$19,981	\$20,544	\$21,019	\$21,786
Subtotal	\$47,789	\$52,586	\$61,425	\$63,157	\$64,938	\$66,769	\$68,313	\$70,805
Total	\$147,044	\$161,804	\$188,999	\$194,329	\$199,808	\$205,442	\$210,193	\$217,862

Source: TNDG

Table A-7
Potential Capture of Market Area Demand for Retail Sales Expressed in Percentages
City of Santa Paula

Retail Category	2009	2011	2013	2015	2017	2019	2021	2025
<i>Shopper Goods:</i>								
Clothing and Clothing Accessories	85.0%	85.0%	85.0%	85.0%	85.0%	85.0%	85.0%	85.0%
General Merchandise	85.0%	85.0%	85.0%	85.0%	85.0%	85.0%	85.0%	85.0%
Home Furnishings and Appliances	85.0%	85.0%	85.0%	85.0%	85.0%	85.0%	85.0%	85.0%
Other/Specialty	85.0%	85.0%	85.0%	85.0%	85.0%	85.0%	85.0%	85.0%
<i>Convenience Goods:</i>								
Food and Beverage	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Food Services and Drinking Places	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
<i>Heavy Commercial Goods:</i>								
Bldg. Matrl. and Garden Equip. and Supplies	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Motor Vehicle and Parts Dealers	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Gasoline Stations	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Source: TNDG

Table A-8
Potential Capture of Market Area Demand for Retail Sales Expressed in Percentages
Secondary Market Area

Retail Category	2009	2011	2013	2015	2017	2019	2021	2025
<i>Shopper Goods:</i>								
Clothing and Clothing Accessories	65.0%	65.0%	65.0%	65.0%	65.0%	65.0%	65.0%	65.0%
General Merchandise	65.0%	65.0%	65.0%	65.0%	65.0%	65.0%	65.0%	65.0%
Home Furnishings and Appliances	65.0%	65.0%	65.0%	65.0%	65.0%	65.0%	65.0%	65.0%
Other/Specialty	65.0%	65.0%	65.0%	65.0%	65.0%	65.0%	65.0%	65.0%
<i>Convenience Goods:</i>								
Food and Beverage	30.0%	30.0%	30.0%	30.0%	30.0%	30.0%	30.0%	30.0%
Food Services and Drinking Places	40.0%	40.0%	40.0%	40.0%	40.0%	40.0%	40.0%	40.0%
<i>Heavy Commercial Goods:</i>								
Bldg. Matrl. and Garden Equip. and Supplies	85.0%	85.0%	85.0%	85.0%	85.0%	85.0%	85.0%	85.0%
Motor Vehicle and Parts Dealers	40.0%	40.0%	40.0%	40.0%	40.0%	40.0%	40.0%	40.0%
Gasoline Stations	40.0%	40.0%	40.0%	40.0%	40.0%	40.0%	40.0%	40.0%

Source: TNDG

Table A-9
Potential Capture of Market Area Demand for Retail Sales
City of Santa Paula
In thousands of constant dollars

Retail Category	2009	2011	2013	2015	2017	2019	2021	2025
<i>Shopper Goods:</i>								
Clothing and Clothing Accessories	\$13,120	\$14,397	\$16,950	\$17,565	\$18,203	\$18,865	\$19,319	\$19,787
General Merchandise	\$18,522	\$20,325	\$23,929	\$24,798	\$25,699	\$26,632	\$27,274	\$27,935
Home Furnishings and Appliances	\$9,261	\$10,163	\$11,964	\$12,399	\$12,849	\$13,316	\$13,637	\$13,967
Other/Specialty	\$15,435	\$16,938	\$19,941	\$20,665	\$21,416	\$22,194	\$22,729	\$23,279
Subtotal	\$56,338	\$61,822	\$72,784	\$75,428	\$78,168	\$81,007	\$82,960	\$84,969
<i>Convenience Goods:</i>								
Food and Beverage	\$34,502	\$37,860	\$44,574	\$46,193	\$47,871	\$49,609	\$50,805	\$52,036
Food Services and Drinking Places	\$21,791	\$23,912	\$28,152	\$29,174	\$30,234	\$31,332	\$32,088	\$32,865
Subtotal	\$56,292	\$61,772	\$72,725	\$75,367	\$78,105	\$80,942	\$82,893	\$84,900
<i>Heavy Commercial Goods:</i>								
Bldg. Matrl. and Garden Equip. and Supplies	\$12,711	\$13,949	\$16,422	\$17,018	\$17,637	\$18,277	\$18,718	\$19,171
Motor Vehicle and Parts Dealers	\$28,146	\$30,886	\$36,363	\$37,683	\$39,052	\$40,471	\$41,446	\$42,450
Gasoline Stations	\$18,159	\$19,927	\$23,460	\$24,312	\$25,195	\$26,110	\$26,740	\$27,387
Subtotal	\$59,016	\$64,761	\$76,244	\$79,014	\$81,884	\$84,858	\$86,904	\$89,008
Total	\$171,646	\$188,355	\$221,753	\$229,808	\$238,156	\$246,807	\$252,757	\$258,878

Source: TNDG

Table A-10
Potential Capture of Market Area Demand for Retail Sales
Secondary Market Area
In thousands of constant dollars

Retail Category	2009	2011	2013	2015	2017	2019	2021	2025
<i>Shopper Goods:</i>								
Clothing and Clothing Accessories	\$8,124	\$8,940	\$10,442	\$10,737	\$11,039	\$11,351	\$11,613	\$12,037
General Merchandise	\$11,469	\$12,621	\$14,742	\$15,158	\$15,585	\$16,024	\$16,395	\$16,993
Home Furnishings and Appliances	\$5,735	\$6,310	\$7,371	\$7,579	\$7,793	\$8,012	\$8,198	\$8,497
Other/Specialty	\$9,558	\$10,517	\$12,285	\$12,631	\$12,988	\$13,354	\$13,663	\$14,161
Subtotal	\$34,886	\$38,388	\$44,840	\$46,104	\$47,404	\$48,741	\$49,868	\$51,688
<i>Convenience Goods:</i>								
Food and Beverage	\$8,382	\$9,223	\$10,773	\$11,077	\$11,389	\$11,710	\$11,981	\$12,418
Food Services and Drinking Places	\$7,058	\$7,767	\$9,072	\$9,328	\$9,591	\$9,861	\$10,089	\$10,457
Subtotal	\$15,440	\$16,989	\$19,845	\$20,404	\$20,980	\$21,571	\$22,070	\$22,876
<i>Heavy Commercial Goods:</i>								
Bldg. Matrl. and Garden Equip. and Supplies	\$8,749	\$9,627	\$11,245	\$11,563	\$11,889	\$12,224	\$12,506	\$12,963
Motor Vehicle and Parts Dealers	\$9,117	\$10,032	\$11,718	\$12,048	\$12,388	\$12,737	\$13,032	\$13,507
Gasoline Stations	\$5,882	\$6,472	\$7,560	\$7,773	\$7,992	\$8,218	\$8,408	\$8,714
Subtotal	\$23,748	\$26,131	\$30,523	\$31,384	\$32,269	\$33,179	\$33,946	\$35,185
Total	\$74,073	\$81,509	\$95,208	\$97,893	\$100,653	\$103,491	\$105,885	\$109,748

Source: TNDG

Table A-11
Potential Capture of Market Area Demand for Retail Sales
Combined Retail Trade Areas
In thousands of constant dollars

Retail Category	2009	2011	2013	2015	2017	2019	2021	2025
<i>Shopper Goods:</i>								
Clothing and Clothing Accessories	\$21,244	\$23,337	\$27,392	\$28,302	\$29,243	\$30,215	\$30,933	\$31,824
General Merchandise	\$29,991	\$32,946	\$38,671	\$39,956	\$41,284	\$42,657	\$43,669	\$44,928
Home Furnishings and Appliances	\$14,996	\$16,473	\$19,335	\$19,978	\$20,642	\$21,328	\$21,835	\$22,464
Other/Specialty	\$24,993	\$27,455	\$32,226	\$33,296	\$34,403	\$35,547	\$36,391	\$37,440
Subtotal	\$91,224	\$100,210	\$117,624	\$121,532	\$125,572	\$129,748	\$132,828	\$136,657
<i>Convenience Goods:</i>								
Food and Beverage	\$42,883	\$47,083	\$55,347	\$57,269	\$59,260	\$61,320	\$62,786	\$64,454
Food Services and Drinking Places	\$28,849	\$30,886	\$36,363	\$37,683	\$39,052	\$40,471	\$41,446	\$42,450
Subtotal	\$71,732	\$77,969	\$91,709	\$94,953	\$98,312	\$101,790	\$104,233	\$106,904
<i>Heavy Commercial Goods:</i>								
Bldg. Matrl. and Garden Equip. and Supplies	\$21,460	\$23,576	\$27,667	\$28,581	\$29,525	\$30,501	\$31,224	\$32,134
Motor Vehicle and Parts Dealers	\$37,263	\$40,918	\$48,081	\$49,732	\$51,440	\$53,208	\$54,478	\$55,958
Gasoline Stations	\$24,041	\$26,399	\$31,020	\$32,085	\$33,187	\$34,328	\$35,147	\$36,102
Subtotal	\$82,764	\$90,892	\$106,768	\$110,398	\$114,153	\$118,037	\$120,850	\$124,193
Total	\$245,720	\$269,072	\$316,101	\$326,883	\$338,036	\$349,575	\$357,911	\$367,754

Source: TNDG

Table A-12
Comparison of Potential Demand with Actual Sales (Non-Grocery Categories)
City of Santa Paula
In Thousands of 2009 Dollars

Retail Category	2009 Demand	2009 Sales	Expected Less Actual	Percent Actual/Expected
<i>Shopper Goods:</i>				
GAFO*	\$91,224	\$31,449	\$59,775	34.47%
<i>Convenience Goods:</i>				
Food and Beverage	\$42,883	\$48,680	(\$5,797)	113.52%
Food Services and Drinking Places	\$28,849	\$20,235	\$8,614	70.14%
Subtotal	\$71,732	\$68,915	\$2,817	96.07%
<i>Heavy Commercial Goods:</i>				
Bldg. Matrl. and Garden Equip. and Supplies	\$21,460	\$1,605	\$19,855	7.48%
Motor Vehicle and Parts Dealers	\$37,263	\$19,111	\$18,152	51.29%
Gasoline Stations	\$24,041	\$21,154	\$2,887	87.99%
Subtotal	\$82,764	\$41,870	\$40,894	50.59%
Total	\$202,836	\$93,554	\$109,282	46.12%

*GAFO: General Merchandise, Apparel, Furniture/Appliances, Other/Specialty

Source: TNDG; SBOE.

Table A-13
Net Supportable Retail Sales
Santa Paula Retail Trade Area
In Thousands of 2009 Dollars

Retail Category	2009	2011	2013	2015	2017	2019	2021	2025
<i>Shopper Goods:</i>								
GAFO	\$59,775	\$68,761	\$86,175	\$90,083	\$94,123	\$98,299	\$101,379	\$105,208
<i>Convenience Goods:</i>								
Food and Beverage	\$0	\$4,200	\$12,463	\$14,386	\$16,376	\$18,436	\$19,903	\$21,571
Food Services and Drinking Places	\$8,614	\$10,651	\$16,128	\$17,448	\$18,817	\$20,236	\$21,211	\$22,215
Subtotal	\$8,614	\$14,851	\$28,591	\$31,835	\$35,194	\$38,672	\$41,115	\$43,786
<i>Heavy Commercial Goods:</i>								
Bldg. Matrl. and Garden Equip. and Supplies	\$19,855	\$21,971	\$26,062	\$26,976	\$27,920	\$28,896	\$29,619	\$30,529
Motor Vehicle and Parts Dealers	\$18,152	\$21,807	\$28,970	\$30,621	\$32,329	\$34,097	\$35,367	\$36,847
Gasoline Stations	\$2,887	\$5,245	\$9,866	\$10,931	\$12,033	\$13,174	\$13,993	\$14,948
Subtotal	\$21,039	\$27,052	\$38,835	\$41,552	\$44,363	\$47,271	\$49,361	\$51,794
GRAND TOTAL	\$89,427	\$110,663	\$153,601	\$163,469	\$173,679	\$184,242	\$191,854	\$200,788

Source: TNDG

Table A-14
Net Supportable Retail Space
Santa Paula Retail Trade Area
Expressed in Square Feet

Retail Category	Sales/ Square Feet	2011	2013	2015	2017	2019	2021	2025
GAFO	\$300	229,203	287,250	300,277	313,743	327,663	337,930	350,692
Food and Beverage	\$418	10,048	29,816	34,416	39,178	44,106	47,615	51,604
Food Services and Drinking Places	\$300	35,504	53,759	58,162	62,724	67,453	70,705	74,051
Bldg. Matrl. and Garden Equip. and Supplies	\$225	97,648	115,832	119,893	124,089	128,426	131,641	135,684
Auto Parts*	\$175	9,969	13,243	13,998	14,779	15,587	16,168	16,844
Services Space @ 10% of Total Space	N/A	42,486	55,545	58,527	61,613	64,804	67,118	69,875
GRAND TOTAL		424,857	555,445	585,273	616,126	648,039	671,176	698,750

Source: TNDG; Urban Land Institute (ULI); SBOE.

*Assumes that automotive parts stores account for 8% of sales in Motor Vehicle and Parts Dealers group category (based on countywide average, 2007-2009, as reported by the SBOE).

APPENDIX B:

**RETAIL DEMAND ANALYSIS
SANTA PAULA TRADE AREA**

(Conservative Population Projections Scenario)

**Table B-1
Population
Santa Paula Retail Trade Area**

Area	2009	2011	2013	2015	2017	2019	2021	2025
City of Santa Paula	29,249	29,368	29,368	29,798	30,729	31,590	32,978	34,613
Secondary Market Area	22,164	22,315	22,315	22,315	22,315	22,315	22,315	22,315
Total	51,412	51,683	51,683	52,114	53,045	53,906	55,294	56,928

Source: ESRI; U.S. Census; Southern California Association of Governments (SCAG); The Natelson Dale Group, Inc. (TNDG).

**Table B-2
Per Capita Income Projections
Santa Paula Retail Trade Area
In constant dollars**

	2009							
City of Santa Paula		\$26,210						
Secondary Market Area		\$29,068						
Annual Increase Factor		0.00%						
Area	2009	2011	2013	2015	2017	2019	2021	2025
City of Santa Paula	\$26,210	\$26,210	\$26,210	\$26,210	\$26,210	\$26,210	\$26,210	\$26,210
Secondary Market Area	\$29,068	\$29,068	\$29,068	\$29,068	\$29,068	\$29,068	\$29,068	\$29,068

Source: ESRI; TNDG.

Table B-3
Total Income and Potential Retail Sales Projections
Santa Paula Retail Trade Area
In thousands of constant dollars

	2009	2011	2013	2015	2017	2019	2021	2025
Percent of Income Spent on Retail Goods								
City of Santa Paula	23.7%	25.9%	29.4%	29.4%	29.4%	29.4%	29.4%	29.4%
Secondary Market Area	22.8%	24.9%	28.3%	28.3%	28.3%	28.3%	28.3%	28.3%
Area	2009	2011	2013	2015	2017	2019	2021	2025
Total Income:								
City of Santa Paula	\$766,601	\$769,722	\$769,722	\$781,006	\$805,407	\$827,974	\$864,353	\$907,192
Secondary Market Area	\$644,255	\$648,665	\$648,665	\$648,665	\$648,665	\$648,665	\$648,665	\$648,665
Total	\$1,410,856	\$1,418,387	\$1,418,387	\$1,429,671	\$1,454,072	\$1,476,639	\$1,513,018	\$1,555,858
Potential Retail Sales:								
City of Santa Paula	\$181,588	\$199,265	\$226,375	\$229,693	\$236,869	\$243,506	\$254,205	\$266,805
Secondary Market Area	\$147,044	\$161,804	\$183,817	\$183,817	\$183,817	\$183,817	\$183,817	\$183,817
Total	\$328,632	\$361,069	\$410,191	\$413,510	\$420,686	\$427,323	\$438,022	\$450,621

Source: TNDG

Table B-4
Distribution of Retail Sales by Retail Category
Santa Paula Retail Trade Area

Retail Category	%Distribution 2009	%Distribution 2011	%Distribution 2013	%Distribution 2015	%Distribution 2017	%Distribution 2019	%Distribution 2021	%Distribution 2025
<i>Shopper Goods:</i>								
Clothing and Clothing Accessories	8.5%	8.5%	8.5%	8.5%	8.5%	8.5%	8.5%	8.5%
General Merchandise	12.0%	12.0%	12.0%	12.0%	12.0%	12.0%	12.0%	12.0%
Home Furnishings and Appliances	6.0%	6.0%	6.0%	6.0%	6.0%	6.0%	6.0%	6.0%
Other/Specialty	10.0%	10.0%	10.0%	10.0%	10.0%	10.0%	10.0%	10.0%
Subtotal	36.5%	36.5%	36.5%	36.5%	36.5%	36.5%	36.5%	36.5%
<i>Convenience Goods:</i>								
Food and Beverage	19.0%	19.0%	19.0%	19.0%	19.0%	19.0%	19.0%	19.0%
Food Services and Drinking Places	12.0%	12.0%	12.0%	12.0%	12.0%	12.0%	12.0%	12.0%
Subtotal	31.0%	31.0%	31.0%	31.0%	31.0%	31.0%	31.0%	31.0%
<i>Heavy Commercial Goods:</i>								
Bldg. Matrl. and Garden Equip. and Supplies	7.0%	7.0%	7.0%	7.0%	7.0%	7.0%	7.0%	7.0%
Motor Vehicle and Parts Dealers	15.5%	15.5%	15.5%	15.5%	15.5%	15.5%	15.5%	15.5%
Gasoline Stations	10.0%	10.0%	10.0%	10.0%	10.0%	10.0%	10.0%	10.0%
Subtotal	32.5%	32.5%	32.5%	32.5%	32.5%	32.5%	32.5%	32.5%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Source: TNDG, based 2009 taxable sales reported by the State Board of Equalization (SBOE) for Ventura County.

Table B-5
Projected Demand for Retail Sales by Major Retail Category
City of Santa Paula
In thousands of constant dollars

Retail Category	2009	2011	2013	2015	2017	2019	2021	2025
<i>Shopper Goods:</i>								
Clothing and Clothing Accessories	\$15,435	\$16,938	\$19,242	\$19,524	\$20,134	\$20,698	\$21,607	\$22,678
General Merchandise	\$21,791	\$23,912	\$27,165	\$27,563	\$28,424	\$29,221	\$30,505	\$32,017
Home Furnishings and Appliances	\$10,895	\$11,956	\$13,582	\$13,782	\$14,212	\$14,610	\$15,252	\$16,008
Other/Specialty	\$18,159	\$19,927	\$22,637	\$22,969	\$23,687	\$24,351	\$25,421	\$26,680
Subtotal	\$66,280	\$72,732	\$82,627	\$83,838	\$86,457	\$88,880	\$92,785	\$97,384
<i>Convenience Goods:</i>								
Food and Beverage	\$34,502	\$37,860	\$43,011	\$43,642	\$45,005	\$46,266	\$48,299	\$50,693
Food Services and Drinking Places	\$21,791	\$23,912	\$27,165	\$27,563	\$28,424	\$29,221	\$30,505	\$32,017
Subtotal	\$56,292	\$61,772	\$70,176	\$71,205	\$73,430	\$75,487	\$78,804	\$82,709
<i>Heavy Commercial Goods:</i>								
Bldg. Matrl. and Garden Equip. and Supplies	\$12,711	\$13,949	\$15,846	\$16,079	\$16,581	\$17,045	\$17,794	\$18,676
Motor Vehicle and Parts Dealers	\$28,146	\$30,886	\$35,088	\$35,602	\$36,715	\$37,743	\$39,402	\$41,355
Gasoline Stations	\$18,159	\$19,927	\$22,637	\$22,969	\$23,687	\$24,351	\$25,421	\$26,680
Subtotal	\$59,016	\$64,761	\$73,572	\$74,650	\$76,983	\$79,140	\$82,617	\$86,711
Total	\$181,588	\$199,265	\$226,375	\$229,693	\$236,869	\$243,506	\$254,205	\$266,805

Source: TNDG

Table B-6
Projected Demand for Retail Sales by Major Retail Category
Secondary Market Area
In thousands of constant dollars

Retail Category	2009	2011	2013	2015	2017	2019	2021	2025
<i>Shopper Goods:</i>								
Clothing and Clothing Accessories	\$12,499	\$13,753	\$15,624	\$15,624	\$15,624	\$15,624	\$15,624	\$15,624
General Merchandise	\$17,645	\$19,416	\$22,058	\$22,058	\$22,058	\$22,058	\$22,058	\$22,058
Home Furnishings and Appliances	\$8,823	\$9,708	\$11,029	\$11,029	\$11,029	\$11,029	\$11,029	\$11,029
Other/Specialty	\$14,704	\$16,180	\$18,382	\$18,382	\$18,382	\$18,382	\$18,382	\$18,382
Subtotal	\$53,671	\$59,058	\$67,093	\$67,093	\$67,093	\$67,093	\$67,093	\$67,093
<i>Convenience Goods:</i>								
Food and Beverage	\$27,938	\$30,743	\$34,925	\$34,925	\$34,925	\$34,925	\$34,925	\$34,925
Food Services and Drinking Places	\$17,645	\$19,416	\$22,058	\$22,058	\$22,058	\$22,058	\$22,058	\$22,058
Subtotal	\$45,584	\$50,159	\$56,983	\$56,983	\$56,983	\$56,983	\$56,983	\$56,983
<i>Heavy Commercial Goods:</i>								
Bldg. Matrl. and Garden Equip. and Supplies	\$10,293	\$11,326	\$12,867	\$12,867	\$12,867	\$12,867	\$12,867	\$12,867
Motor Vehicle and Parts Dealers	\$22,792	\$25,080	\$28,492	\$28,492	\$28,492	\$28,492	\$28,492	\$28,492
Gasoline Stations	\$14,704	\$16,180	\$18,382	\$18,382	\$18,382	\$18,382	\$18,382	\$18,382
Subtotal	\$47,789	\$52,586	\$59,740	\$59,740	\$59,740	\$59,740	\$59,740	\$59,740
Total	\$147,044	\$161,804	\$183,817	\$183,817	\$183,817	\$183,817	\$183,817	\$183,817

Source: TNDG

Table B-7
Potential Capture of Market Area Demand for Retail Sales Expressed in Percentages
City of Santa Paula

Retail Category	2009	2011	2013	2015	2017	2019	2021	2025
<i>Shopper Goods:</i>								
Clothing and Clothing Accessories	85.0%	85.0%	85.0%	85.0%	85.0%	85.0%	85.0%	85.0%
General Merchandise	85.0%	85.0%	85.0%	85.0%	85.0%	85.0%	85.0%	85.0%
Home Furnishings and Appliances	85.0%	85.0%	85.0%	85.0%	85.0%	85.0%	85.0%	85.0%
Other/Specialty	85.0%	85.0%	85.0%	85.0%	85.0%	85.0%	85.0%	85.0%
<i>Convenience Goods:</i>								
Food and Beverage	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Food Services and Drinking Places	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
<i>Heavy Commercial Goods:</i>								
Bldg. Matrl. and Garden Equip. and Supplies	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Motor Vehicle and Parts Dealers	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Gasoline Stations	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Source: TNDG

Table B-8
Potential Capture of Market Area Demand for Retail Sales Expressed in Percentages
Secondary Market Area

Retail Category	2009	2011	2013	2015	2017	2019	2021	2025
<i>Shopper Goods:</i>								
Clothing and Clothing Accessories	65.0%	65.0%	65.0%	65.0%	65.0%	65.0%	65.0%	65.0%
General Merchandise	65.0%	65.0%	65.0%	65.0%	65.0%	65.0%	65.0%	65.0%
Home Furnishings and Appliances	65.0%	65.0%	65.0%	65.0%	65.0%	65.0%	65.0%	65.0%
Other/Specialty	65.0%	65.0%	65.0%	65.0%	65.0%	65.0%	65.0%	65.0%
<i>Convenience Goods:</i>								
Food and Beverage	30.0%	30.0%	30.0%	30.0%	30.0%	30.0%	30.0%	30.0%
Food Services and Drinking Places	40.0%	40.0%	40.0%	40.0%	40.0%	40.0%	40.0%	40.0%
<i>Heavy Commercial Goods:</i>								
Bldg. Matrl. and Garden Equip. and Supplies	85.0%	85.0%	85.0%	85.0%	85.0%	85.0%	85.0%	85.0%
Motor Vehicle and Parts Dealers	40.0%	40.0%	40.0%	40.0%	40.0%	40.0%	40.0%	40.0%
Gasoline Stations	40.0%	40.0%	40.0%	40.0%	40.0%	40.0%	40.0%	40.0%

Source: TNDG

Table B-9
Potential Capture of Market Area Demand for Retail Sales
City of Santa Paula
In thousands of constant dollars

Retail Category	2009	2011	2013	2015	2017	2019	2021	2025
<i>Shopper Goods:</i>								
Clothing and Clothing Accessories	\$13,120	\$14,397	\$16,356	\$16,595	\$17,114	\$17,593	\$18,366	\$19,277
General Merchandise	\$18,522	\$20,325	\$23,090	\$23,429	\$24,161	\$24,838	\$25,929	\$27,214
Home Furnishings and Appliances	\$9,261	\$10,163	\$11,545	\$11,714	\$12,080	\$12,419	\$12,964	\$13,607
Other/Specialty	\$15,435	\$16,938	\$19,242	\$19,524	\$20,134	\$20,698	\$21,607	\$22,678
Subtotal	\$56,338	\$61,822	\$70,233	\$71,262	\$73,489	\$75,548	\$78,867	\$82,776
<i>Convenience Goods:</i>								
Food and Beverage	\$34,502	\$37,860	\$43,011	\$43,642	\$45,005	\$46,266	\$48,299	\$50,693
Food Services and Drinking Places	\$21,791	\$23,912	\$27,165	\$27,563	\$28,424	\$29,221	\$30,505	\$32,017
Subtotal	\$56,292	\$61,772	\$70,176	\$71,205	\$73,430	\$75,487	\$78,804	\$82,709
<i>Heavy Commercial Goods:</i>								
Bldg. Matr. and Garden Equip. and Supplies	\$12,711	\$13,949	\$15,846	\$16,079	\$16,581	\$17,045	\$17,794	\$18,676
Motor Vehicle and Parts Dealers	\$28,146	\$30,886	\$35,088	\$35,602	\$36,715	\$37,743	\$39,402	\$41,355
Gasoline Stations	\$18,159	\$19,927	\$22,637	\$22,969	\$23,687	\$24,351	\$25,421	\$26,680
Subtotal	\$59,016	\$64,761	\$73,572	\$74,650	\$76,983	\$79,140	\$82,617	\$86,711
Total	\$171,646	\$188,355	\$213,981	\$217,117	\$223,901	\$230,174	\$240,288	\$252,197

Source: TNDG

Table B-10
Potential Capture of Market Area Demand for Retail Sales
Secondary Market Area
In thousands of constant dollars

Retail Category	2009	2011	2013	2015	2017	2019	2021	2025
<i>Shopper Goods:</i>								
Clothing and Clothing Accessories	\$8,124	\$8,940	\$10,156	\$10,156	\$10,156	\$10,156	\$10,156	\$10,156
General Merchandise	\$11,469	\$12,621	\$14,338	\$14,338	\$14,338	\$14,338	\$14,338	\$14,338
Home Furnishings and Appliances	\$5,735	\$6,310	\$7,169	\$7,169	\$7,169	\$7,169	\$7,169	\$7,169
Other/Specialty	\$9,558	\$10,517	\$11,948	\$11,948	\$11,948	\$11,948	\$11,948	\$11,948
Subtotal	\$34,886	\$38,388	\$43,610	\$43,610	\$43,610	\$43,610	\$43,610	\$43,610
<i>Convenience Goods:</i>								
Food and Beverage	\$8,382	\$9,223	\$10,478	\$10,478	\$10,478	\$10,478	\$10,478	\$10,478
Food Services and Drinking Places	\$7,058	\$7,767	\$8,823	\$8,823	\$8,823	\$8,823	\$8,823	\$8,823
Subtotal	\$15,440	\$16,989	\$19,301	\$19,301	\$19,301	\$19,301	\$19,301	\$19,301
<i>Heavy Commercial Goods:</i>								
Bldg. Matr. and Garden Equip. and Supplies	\$8,749	\$9,627	\$10,937	\$10,937	\$10,937	\$10,937	\$10,937	\$10,937
Motor Vehicle and Parts Dealers	\$9,117	\$10,032	\$11,397	\$11,397	\$11,397	\$11,397	\$11,397	\$11,397
Gasoline Stations	\$5,882	\$6,472	\$7,353	\$7,353	\$7,353	\$7,353	\$7,353	\$7,353
Subtotal	\$23,748	\$26,131	\$29,686	\$29,686	\$29,686	\$29,686	\$29,686	\$29,686
Total	\$74,073	\$81,509	\$92,598	\$92,598	\$92,598	\$92,598	\$92,598	\$92,598

Source: TNDG

Table B-11
Potential Capture of Market Area Demand for Retail Sales
Combined Retail Trade Areas
In thousands of constant dollars

Retail Category	2009	2011	2013	2015	2017	2019	2021	2025
<i>Shopper Goods:</i>								
Clothing and Clothing Accessories	\$21,244	\$23,337	\$26,511	\$26,751	\$27,270	\$27,749	\$28,522	\$29,432
General Merchandise	\$29,991	\$32,946	\$37,428	\$37,766	\$38,498	\$39,175	\$40,267	\$41,552
Home Furnishings and Appliances	\$14,996	\$16,473	\$18,714	\$18,883	\$19,249	\$19,588	\$20,133	\$20,776
Other/Specialty	\$24,993	\$27,455	\$31,190	\$31,472	\$32,082	\$32,646	\$33,556	\$34,626
Subtotal	\$91,224	\$100,210	\$113,843	\$114,873	\$117,099	\$119,158	\$122,478	\$126,387
<i>Convenience Goods:</i>								
Food and Beverage	\$42,883	\$47,083	\$53,489	\$54,119	\$55,483	\$56,744	\$58,777	\$61,170
Food Services and Drinking Places	\$28,849	\$30,886	\$35,088	\$35,602	\$36,715	\$37,743	\$39,402	\$41,355
Subtotal	\$71,732	\$77,969	\$88,577	\$89,722	\$92,198	\$94,487	\$98,178	\$102,525
<i>Heavy Commercial Goods:</i>								
Bldg. Matrl. and Garden Equip. and Supplies	\$21,460	\$23,576	\$26,783	\$27,016	\$27,518	\$27,983	\$28,731	\$29,613
Motor Vehicle and Parts Dealers	\$37,263	\$40,918	\$46,485	\$46,999	\$48,111	\$49,140	\$50,798	\$52,751
Gasoline Stations	\$24,041	\$26,399	\$29,990	\$30,322	\$31,040	\$31,703	\$32,773	\$34,033
Subtotal	\$82,764	\$90,892	\$103,258	\$104,337	\$106,669	\$108,826	\$112,303	\$116,398
Total	\$245,720	\$269,072	\$305,678	\$308,931	\$315,966	\$322,471	\$332,959	\$345,310

Source: TNDG

Table B-12
Comparison of Potential Demand with Actual Sales (Non-Grocery Categories)
City of Santa Paula
In Thousands of 2009 Dollars

Retail Category	2009 Demand	2009 Sales	Expected Less Actual	Percent Actual/Expected
<i>Shopper Goods:</i>				
GAFO*	\$91,224	\$31,449	\$59,775	34.47%
<i>Convenience Goods:</i>				
Food and Beverage	\$42,883	\$48,680	(\$5,797)	113.52%
Food Services and Drinking Places	\$28,849	\$20,235	\$8,614	70.14%
Subtotal	\$71,732	\$68,915	\$2,817	96.07%
<i>Heavy Commercial Goods:</i>				
Bldg. Matrl. and Garden Equip. and Supplies	\$21,460	\$1,605	\$19,855	7.48%
Motor Vehicle and Parts Dealers	\$37,263	\$19,111	\$18,152	51.29%
Gasoline Stations	\$24,041	\$21,154	\$2,887	87.99%
Subtotal	\$82,764	\$41,870	\$40,894	50.59%
Total	\$202,836	\$93,554	\$109,282	46.12%

*GAFO: General Merchandise, Apparel, Furniture/Appliances, Other/Specialty

Source: TNDG; SBOE.

Table B-13
Net Supportable Retail Sales
Santa Paula Retail Trade Area
In Thousands of 2009 Dollars

Retail Category	2009	2011	2013	2015	2017	2019	2021	2025
<i>Shopper Goods:</i>								
GAFO	\$59,775	\$68,761	\$82,394	\$83,424	\$85,650	\$87,709	\$91,029	\$94,938
<i>Convenience Goods:</i>								
Food and Beverage	\$0	\$4,200	\$10,605	\$11,236	\$12,599	\$13,860	\$15,893	\$18,287
Food Services and Drinking Places	\$8,614	\$10,651	\$14,853	\$15,367	\$16,480	\$17,508	\$19,167	\$21,120
Subtotal	\$8,614	\$14,851	\$25,459	\$26,603	\$29,079	\$31,369	\$35,060	\$39,407
<i>Heavy Commercial Goods:</i>								
Bldg. Matrl. and Garden Equip. and Supplies	\$19,855	\$21,971	\$25,178	\$25,411	\$25,913	\$26,378	\$27,126	\$28,008
Motor Vehicle and Parts Dealers	\$18,152	\$21,807	\$27,374	\$27,888	\$29,000	\$30,029	\$31,687	\$33,640
Gasoline Stations	\$2,887	\$5,245	\$8,836	\$9,168	\$9,886	\$10,549	\$11,619	\$12,879
Subtotal	\$21,039	\$27,052	\$36,210	\$37,056	\$38,886	\$40,578	\$43,307	\$46,519
GRAND TOTAL	\$89,427	\$110,663	\$144,063	\$147,083	\$153,615	\$159,657	\$169,395	\$180,864

Source: TNDG

Table B-14
Net Supportable Retail Space
Santa Paula Retail Trade Area
Expressed in Sales/Square Feet

Retail Category	Sales/ Square Feet	2011	2013	2015	2017	2019	2021	2025
GAFO	\$300	229,203	274,647	278,079	285,501	292,364	303,429	316,459
Food and Beverage	\$418	10,048	25,372	26,880	30,142	33,159	38,022	43,749
Food Services and Drinking Places	\$300	35,504	49,510	51,225	54,933	58,362	63,889	70,399
Bldg. Matrl. and Garden Equip. and Supplies	\$225	97,648	111,904	112,936	115,169	117,233	120,562	124,482
Auto Parts*	\$175	9,969	12,514	12,749	13,257	13,728	14,486	15,378
Services Space @ 10% of Total Space	N/A	42,486	52,661	53,541	55,445	57,205	60,043	63,385
GRAND TOTAL		424,857	526,608	535,410	554,446	572,051	600,432	633,852

Source: TNDG; Urban Land Institute (ULI); SBOE.

*Assumes that automotive parts stores account for 8% of sales in Motor Vehicle and Parts Dealers group category (based on countywide average, 2007-2009, as reported SBOE).

APPENDIX C:
RETAIL INVENTORY
SANTA PAULA TRADE AREA

Table C-1
Approximate Square Footage of Retail Space
Cities of Fillmore and Santa Paula

	Fillmore			Santa Paula			Total		
	Shopping Centers	Downtown	Total	Shopping Centers	Downtown	Total	Shopping Centers	Downtown	Total
Shopper Goods									
Clothing and Clothing Accessories	5,688	1,688	7,375	13,825	25,238	39,063	19,513	26,925	46,438
General Merchandise	47,061	11,681	58,742	76,341	25,988	102,329	123,402	37,669	161,071
Home Furnishings and Appliances	1,563	2,188	3,750	0	4,456	4,456	1,563	6,644	8,206
Other/Specialty	3,719	38,119	41,838	11,569	33,200	44,769	15,288	71,319	86,606
<i>Subtotal</i>	<u>58,029</u>	<u>53,675</u>	<u>111,704</u>	<u>101,735</u>	<u>88,881</u>	<u>190,616</u>	<u>159,764</u>	<u>142,556</u>	<u>302,321</u>
Convenience Goods									
Food and Beverage	71,038	3,375	74,413	65,850	1,938	67,788	136,888	5,313	142,200
Food Services and Drinking Places	15,400	11,638	27,038	22,818	22,888	45,706	38,218	34,525	72,743
<i>Subtotal</i>	<u>86,438</u>	<u>15,013</u>	<u>101,450</u>	<u>88,668</u>	<u>24,825</u>	<u>113,493</u>	<u>175,106</u>	<u>39,838</u>	<u>214,943</u>
Heavy Commercial Goods									
Bldg. Matr. and Garden Equip. and Supplies	0	5,250	5,250	11,756	4,263	16,019	11,756	9,513	21,269
Auto Parts, Accessories and Tire Stores	4,688	0	4,688	0	0	0	4,688	0	4,688
<i>Subtotal</i>	<u>4,688</u>	<u>5,250</u>	<u>9,938</u>	<u>11,756</u>	<u>4,263</u>	<u>16,019</u>	<u>16,444</u>	<u>9,513</u>	<u>25,956</u>
Other Retail Space									
Service business	16,419	30,094	46,513	72,095	62,688	134,783	88,514	92,781	181,295
Vacant	9,575	15,525	25,100	12,681	32,425	45,106	22,256	47,950	70,206
<i>Subtotal</i>	<u>25,994</u>	<u>45,619</u>	<u>71,613</u>	<u>84,776</u>	<u>95,113</u>	<u>179,889</u>	<u>110,770</u>	<u>140,731</u>	<u>251,501</u>
GRAND TOTAL	<u>175,148</u>	<u>119,556</u>	<u>294,704</u>	<u>286,936</u>	<u>213,081</u>	<u>500,017</u>	<u>462,084</u>	<u>332,638</u>	<u>794,721</u>

Source: The Natelson Dale Group, Inc. (TNDG); Ventura County Assessor; National Research Bureau (NRB).

**Table C-2
INVENTORY OF RETAIL SHOPPING CENTERS
CITY OF SANTA PAULA**

<u>Shopping Center / Location</u>	<u>GLA</u>	<u>Vacant</u>	<u>Vacancy</u>	<u>Tenants</u>	<u>Category</u>
SANTA PAULA SHOPPING CENTER	177,261	2,156	1.2%		
NWC W Harvard Blvd & S Steckel Dr	5,600			Blockbuster	S
	17,172			CVS	GM
	2,800			Pizza	ED
	2,200			Fashion 101	A
	1,400			Fantasy Cuts	SVC
	1,400			China Wok	ED
	2,200			UPS	SVC
	10,400			Dollar Tree	GM
	1,400			Troop Real Estate	SVC
	1,400			Cleaners	SVC
	41,200			Vons	F
	1,800			Laird's Deli	ED
	3,200			Santa Paula Physical Therapy	SVC
	9,000			Susie's Deals	A
	37,538			Big Lots	GM
	11,756			Heritage Best Hardware	BHG
	13,089			Santa Paula Theaters	SVC
	2,156	2,156		Vacant	VAC
	1,100			Professional Nail	SVC
	1,513			Cash Advance	SVC
	1,100			Subway	ED
	5,569			Chase	SVC
	2,268			Taco Bell	ED
SANTA CRUZ CENTER	33,475	0	0.0%		
SEC W Harvard Blvd & S Steckel Dr	1,563			Zach's Tabacco	S
	4,469			Real Estate	SVC
	6,875			Vacant	VAC
	3,094			97 Cent Center	GM
	1,950			Platinum China	ED
	2,275			Laundry	SVC
	5,000			DMV	SVC
	1,094			Forever Nails	SVC
	1,250			Office	SVC
	3,281			Radioshack	S
	2,625			Dukes	ED
HARVARD SQUARE	17,125	0	0.0%		
SEC W Harvard Blvd & Vernon Way	2,250			Karate	SVC
	1,125			Campesino	ED

<u>Shopping Center / Location</u>	<u>GLA</u>	<u>Vacant</u>	<u>Vacancy</u>	<u>Tenants</u>	<u>Category</u>
	1,875			Steak & Hoagie	ED
	5,250			Seher's Pharmacy	GM
	1,875			Check into Cash	SVC
	1,125			Obsefroces & Gynecology	SVC
	1,375			Total Concept	SVC
	1,125			B Mobile	S
	1,125			Moonlight Donuts	ED
TRESIERRAS CENTER	59,075	3,650	6.2%		
SEC S Palm Ave & E Harvard Blvd	2,338	2,338		Vacant	VAC
	1,313			Angel Donuts	ED
	1,313	1,313		Vacant	VAC
	24,650			Tresierras Supermarket	F
	1,838			Dentist	SVC
	2,625			Payless Shoes	A
	2,888			Palm Pharmacy	GM
	2,363			Center for Family Health	SVC
	1,050			Laundry	SVC
	1,181			Barber	SVC
	919			Nails	SVC
	2,194			Health Insurance	SVC
	6,581			Medical Care	SVC
	4,388			Urgent Care	SVC
	3,438			Carros	ED

Source: TNDG; NRB; Ventura County Assessor.

**Table C-3
INVENTORY OF RETAIL TENANTS AND SQUARE FEET OF BUILDING SPACE
DOWNTOWN SANTA PAULA**

TENANT	NUMBER	STREET	SQUARE FEET	RETAIL CATEGORY
Dentist	800	Main St	4,400	SVC
Vacant		Main St	5,600	VAC
98 Cent Store		Main St	3,400	GM
Blanquite Accessorios		Main St	1,200	GM
Market		Main St	1,200	GM
Flower Shop	834	Main St	1,400	S
Susie's Hair Design	836	Main St	1,400	SVC
Bailey's Vacuum Center	838	Main St	1,400	SVC
Vacant	840	Main St	3,400	VAC
Century 21	848	Main St	2,400	SVC
Vanity Salon	848	Main St	1,994	SVC
Kulwiec Architects	854	Main St #100	2,000	SVC
Goodwill	858	Main St	5,400	S
Brownie's Gift Shop	860	Main St	3,000	S
Princess Bridal Boutique	900	Main St	2,800	A
H&R Block	908	Main St	2,600	SVC
Schoemacher's Collectables	910	Main St	2,200	S
Bridal Shop	912	Main St	1,800	A
BA Income Tax Service	914	Main St	2,200	SVC

TENANT	NUMBER	STREET	SQUARE FEET	RETAIL CATEGORY
Vacant	916	Main St	2,400	VAC
Bridal Shop	918	Main St	2,200	A
Curves	920	Main St	2,200	SVC
Miky Cellular	924	Main St	2,600	S
Merle Morman	926	Main St	2,400	SVC
Mupu Grill	930	Main St	3,000	ED
German's	932	Main St	3,600	ED
Lala's Fashion	938	Main St	2,200	A
Vacant	940	Main St	2,800	VAC
Santa Paula Times	944	Main St	2,400	SVC
Santa Paula Bank	948	Main St	3,200	SVC
Vacant	950	Main St	3,200	VAC
Ely's Beauty Salon	109 1/2	Mill St	375	SVC
Discoteca Santa Paula	109	Mill St	688	S
Tel-Cel Audio	105	Mill St	500	S
Gift Shop		Main St	2,131	GM
Panderia	962	Main St	1,744	ED
Market	964	Main St	2,519	GM
El Pasa Dept. Store		Main St	2,713	GM
Vacant		Main St	2,906	VAC
Meat Market	974	Main St	1,938	F

TENANT	NUMBER	STREET	SQUARE FEET	RETAIL CATEGORY
Los Arcos Taqueria	978	Main St	3,294	ED
Vacant		Main St	2,519	VAC
Angelitos	984	Main St	1,938	A
Ranchero O Zamora	988	Main St	2,131	A
Restaurant La Terraza	1000	Main St	3,875	ED
Gonzales Furniture	1008	Main St	4,456	FA
El Brillante Market	1016	Main St	2,131	GM
Gallery 1020	1020	Main St	2,325	SVC
Frank's Hardware	1026	Main St	4,263	BHG
El Vaquera Western Wear	989	Main St	3,438	A
Vacant		Tenth St	1,050	VAC
Best of VC Market		Tenth St	1,706	GM
Vacant		Tenth St	1,313	VAC
Betty's Fine Cuts		Tenth St	1,050	SVC
Photography		Tenth St	2,475	SVC
Tuscani Deli	973	Main St	1,575	ED
Exotic City	971	Main St	2,250	S
Party Supplies Santa Paula	969	Main St	1,350	S
Salud Mas Vida	967	Main St	2,025	S
Income Tax	965	Main St	1,800	SVC
El Remate	963	Main St	1,575	A

TENANT	NUMBER	STREET	SQUARE FEET	RETAIL CATEGORY
Barber	959	Main St	1,575	SVC
Salon		Main St	1,350	SVC
Chiropractor	957	Main St	3,150	SVC
Joyer's America Gold	955	Main St	2,475	S
Vacant		Main St	3,825	VAC
Mussalman's Antiques	107	Mill St	2,025	S
Boost Mobile	109	Mill St	1,519	S
Velazquez Beauty Salon	106	Mill St	1,300	SVC
Vacant		Mill St	1,625	VAC
Clothing Store		Main St	2,131	A
Salon		Main St	2,713	SVC
Discoteca Discorama	945	Main St	2,325	S
Fit N Fine Fitness		Main St	2,519	SVC
Fashion Ave	935	Main St	3,100	A
Super Store	929	Main St	4,263	GM
Sporting Goods		Main St	1,356	S
Vacant		Main St	1,788	VAC
Allstate	925	Main St #B	1,238	SVC
Supplement Store		Main St	963	S
Salon		Main St	1,100	SVC
Black Tie	915	Main St	1,925	A

TENANT	NUMBER	STREET	SQUARE FEET	RETAIL CATEGORY
Bank		Main St	4,950	SVC
Rabolia's		Main St	2,625	ED
Super Store	851	Main St	4,725	GM
Tanning	847	Main St	4,550	SVC
Coffee Shop		Main St	1,800	ED
Classic Tattoo	821	Main St	750	SVC
Farmers	819	Main St	875	SVC
Chili Hut Café	817	Main St	1,375	ED
Center Smoke Shop	801	Main St	1,125	S

Source: TNDG; Ventura County Assessor.

Table C-4
SHOPPING CENTERS
CITY OF FILLMORE

<u>Shopping Center / Location</u>	<u>GLA</u>	<u>Vacant</u>	<u>Vacancy</u>	<u>Tenants</u>	<u>Category</u>
<u>Street Name:</u>					
Super A Foods Center	70,019	1,275	1.8%		
NWC Ventura St & A St	1,838	-		Ely & J 99 Cents	GM
	2,100	-		Taco Fresh	ED
	2,231	-		Beauty Salon	SVC
	27,813	-		Super A Foods	F
	25,200	-		Dollar Tree	GM
	1,381	-		La Cascada	ED
	1,275	-		Darling Nails & Spa	SVC
	3,294	-		Coin Op Laundry	SVC
	1,275	1,275		Vacant	VAC
	1,063	-		Donuts	ED
	1,381	-		Inspired Development	SVC
	1,169	-		Cellular & Thrift Store	S
Balwin Center	105,129	8,300	7.9%		
SEC Ventura St & A St	1,788	-		Starbucks	ED
	1,513	-		Little Ceasers	ED
	1,800	-		USA Foodmart/Gas	F
	4,688	-		Autozone	AD
	2,344	-		Launderland	SVC
	163	-		Smoke 4 Less	S
	1,250	-		Fancy Nails	SVC
	1,563	-		Reny's Sweet Home	FA
	1,563	-		A-1 Discount	A
	41,425	-		Vons	F
	3,738	3,738		Vacant	VAC
	4,125	-		Payless	A
	1,006	-		Remax	SVC
	1,294	-		Walt's Jewelry	S
	1,294	-		Cleaners	SVC
	20,023	-		Rite Aid	GM
	2,813	2,813		Vacant	VAC
	1,250	-		H&R Block	SVC
	1,750	1,750		Vacant	VAC
	2,400	-		Burger King	ED
	1,563	-		Subway	ED
	1,094	-		Water	S
	1,094	-		Bank of America	SVC

<u>Shopping Center / Location</u>	<u>GLA</u>	<u>Vacant</u>	<u>Vacancy</u>	<u>Tenants</u>	<u>Category</u>
	1,094	-		The BBQ Place	ED
	1,406	-		Donuts	ED
	1,094	-		New China Wok	ED

Source: TNDG; NRB; Ventura County Assessor.

**Table C-5
INVENTORY OF RETAIL TENANTS AND SQUARE FEET OF BUILDING SPACE
DOWNTOWN FILLMORE**

TENANT	NUMBER	STREET	SQUARE FEET	RETAIL CATEGORY
Vacant	320	Central	4,725	VAC
Mike's Tax Service	324	Central	1,163	SVC
Vintage Pleasures	326	Central	2,325	S
Edison's Up In Arms	328	Central	2,819	S
Fillmore Mail Stop	330	Central	1,650	SVC
Tax Service	334	Central	844	SVC
Margret's Gifts & Collectibles	336	Central	1,181	S
Gift Shop	336	Central	1,519	S
Theater	250	Central	2,494	SVC
The Secret Path	338	Central	1,138	S
Vacant	340	Central	2,113	VAC
Fillmore Tattoo	342	Central	2,538	SVC
Oasis Tan	344	Central	650	SVC
Moon Doggies Dog Grooming		Central	1,463	SVC
Western Furniture		Central	2,188	FA
Daniel's Boutique	352	Central	2,125	S
Element Computers	354	Central	5,600	S
Mimstart Photography	358	Central	1,100	SVC
Patterson's Hardware	362	Central	5,250	BHG

TENANT	NUMBER	STREET	SQUARE FEET	RETAIL CATEGORY
Dentist	364	Central	1,650	SVC
Curves	410	Central	1,994	SVC
Hair & Nails	412	Central	2,175	SVC
Boutique	141	Central	1,813	S
Terri's Salon	141	Central	1,994	SVC
Lizette's Jewelry & More	411	Central	4,675	S
Gift Shop	363	Central	5,913	S
Fillmore Video	359	Central	3,225	S
Medical Plaza Pharmacy	353	Central	6,181	GM
Central Market	351	Central	5,500	GM
Central Station	345 A	Central	4,250	ED
Vacant	345 B	Central	850	VAC
Cota's Barber Shop	345 C	Central	1,381	SVC
Vacant	341-101	Central	5,644	VAC
AM Pet	341-105	Central	2,956	S
Post Office		Central	6,450	SVC
That's Cherry	329	Central	1,688	A
Vacant	327	Central	2,194	VAC
La Fondita	323 B	Central	2,531	ED
The Treasure Station	321	Central	1,181	S
Grocery Meat Produce	317	Central	3,375	F

TENANT	NUMBER	STREET	SQUARE FEET	RETAIL CATEGORY
Boma Medical Supply	512	Central	1,650	S
Spa	345	Central	2,550	SVC
Bulla's Teas & Treats	275	Central	2,700	ED
Double AA Café	501	Santa Clara	2,156	ED

Source: TNDG

APPENDIX D:

**MAJOR BIG BOX RETAIL LOCATIONS
SURROUNDING AREAS IN VENTURA COUNTY**

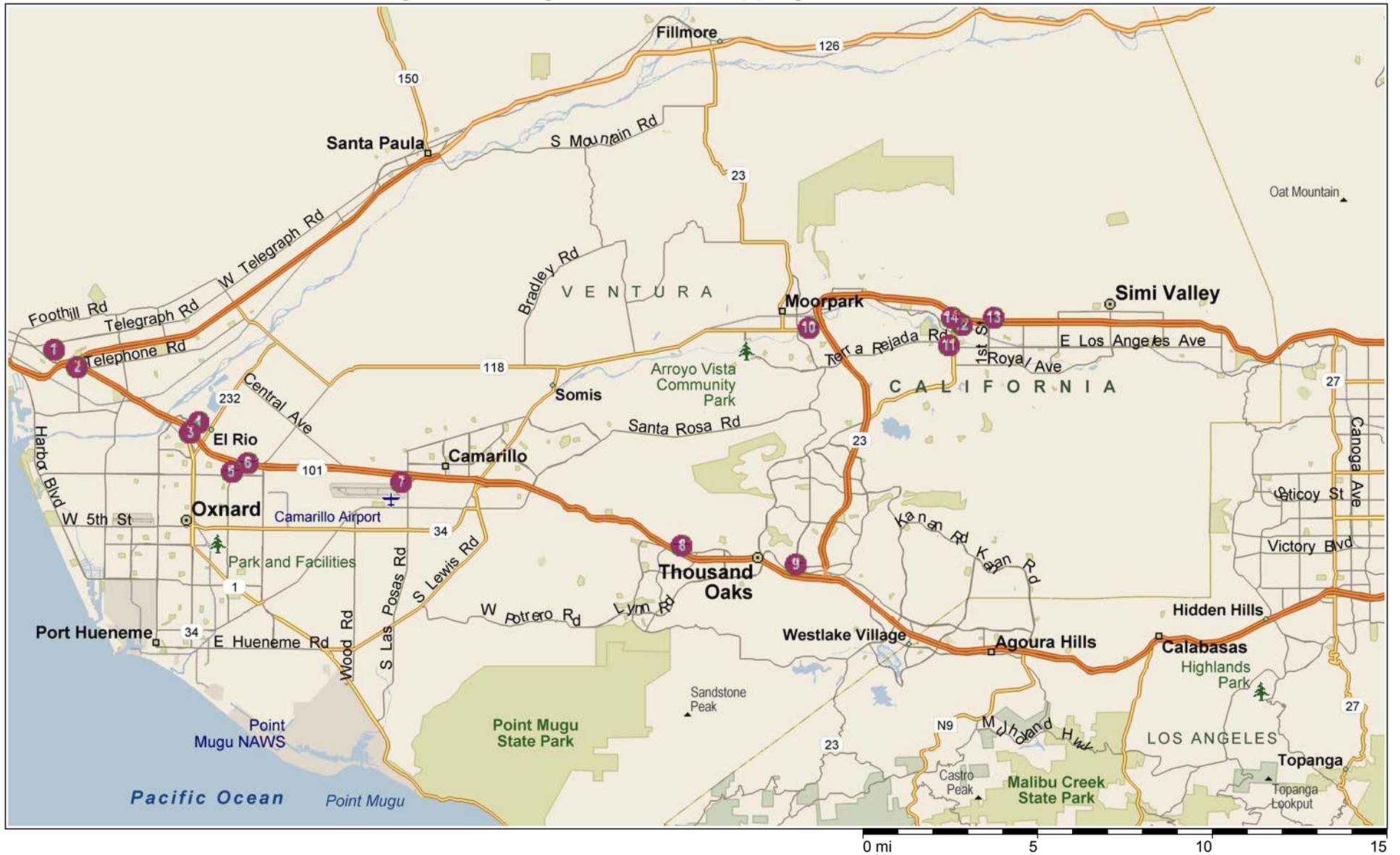
**Table D-1
Major "Big Box" Retail Shopping Centers
Areas Surrounding Santa Paula Retail Trade Area in Ventura County**

Map Key	Shopping Center/Location	GLA	Anchor Tenants
1	Ventura Mall S Mills Rd / E Main St Ventura 93003	1,044,236	Target; Lowe's; JC Penney; Macys
2	Target Center 4200 E Main St Ventura 93003	N/A	Target; Office Depot; Ross Dress for Less
3	Esplandade Shopping Center W Esplandade Dr / N Oxnard Blvd Oxnard 93036	480,643	Home Depot; Staples; TJ Maxx; Nordstrom Rack; Old Navy; Bed Bath & Beyond
4	Target (freestanding) 2850 N Oxnard Blvd Oxnard 93036	N/A	Target
5	Shopping at the Rose I & II N Rose Ave / 101 Oxnard 93036	813,741	Walmart; FAMSA; Ross; Best Buy; Sam's Club; Babies R Us; Sports Authority; Vons
6	Market Place at Plaza Del Norte Paseo Mercado / E Ventura Blvd Oxnard 93036	319,057	Costco; Fry's; 99 Cents Only
7	Camarillo Town Center W Ventura Blvd / S Las Posas Rd Camarillo 93010	345,864	Target; Home Depot; Oshman's Sporting Goods; Ross Dress for Less; Staples
8	The Village Teller Rd / Marion St Thousand Oaks 91320	450,000	Target; Home Depot; Party City
9	Janss Marketplace N Moorpark Rd / Hillcrest Dr Thousand Oaks 91360	456,000	Toys R Us; Marshalls; Burlington Coat Factory; Ross Dress For Less; Old Navy
10	Moorpark Marketplace Los Angeles Ave / Science Dr Moorpark 93021	331,205	Target; Kohl's; Michaels; T.J. Maxx
11	Target (freestanding) 51 Tierra Rejada Simi Valley 93065	N/A	Target

Map Key	Shopping Center/Location	GLA	Anchor Tenants
12	Simi at the Plaza Cochran St / Madera Rd Simi Valley 93065	350,000	Walmart; Home Depot; Office Depot
13	Simi Valley Town Center 1275 Simi Town Center Way Simi Valley 93065	600,000	Lowe's; Babies R Us; Forever 21; Macy's
14	Costco (freestanding) 2660 Park Center Drive Simi Valley 93065	N/A	Costco

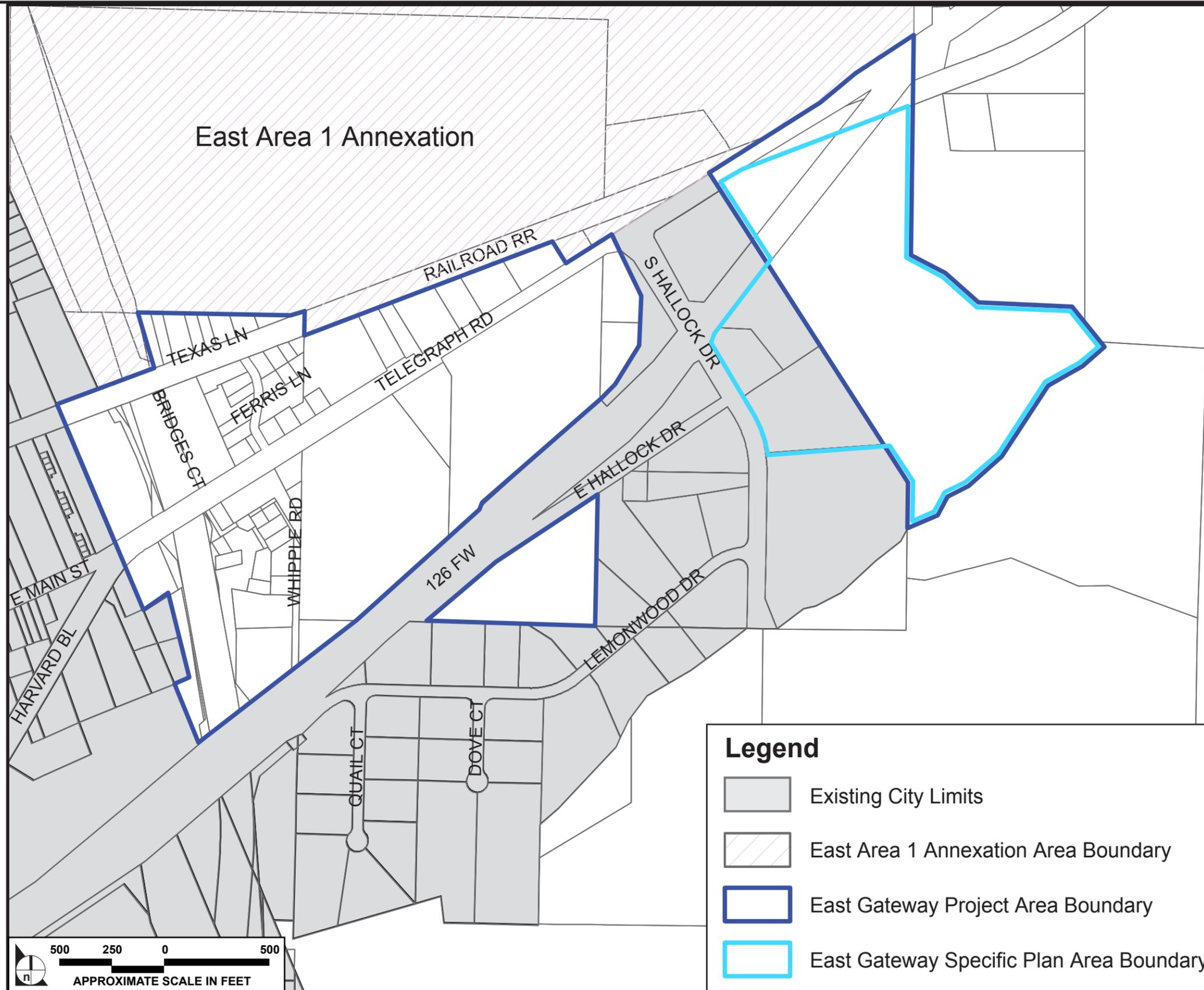
Source: TNDG; NRB; Individual Store Websites

Figure D-1: Big Box Retail Shopping Center Locations



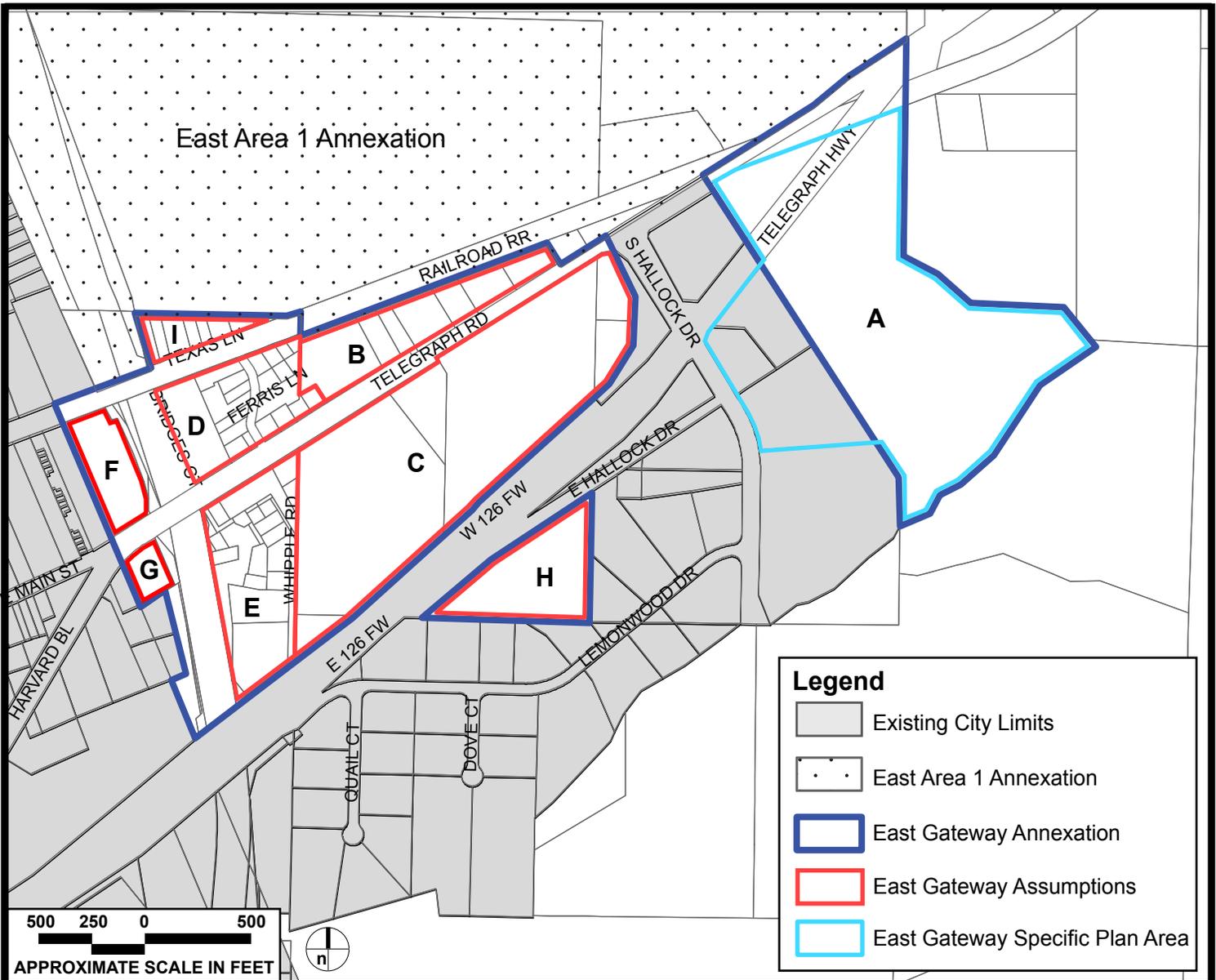
APPENDIX E:
ANNEXATION AREA AND SPECIFIC PLAN AREA MAPS

East Area 1 Annexation



SOURCE: City of Santa Paula 2012

FIGURE E-1



A - Santa Paula East Gateway Specific Plan: 36.5 Acres
29.3 Acres to be Annexed - Remainder in City.
310,000 SF Retail Commercial or 350,000 SF Business Park
and 10,000 SF Retail Commercial Use.

B - Telegraph Road Business Park: 6.3 Acres, 25% FAR
68,500 SF Business Park Uses

C - Telegraph Road Retail: 27.3 Acres, 25% FAR
250,000 SF Retail Commercial Uses

D - Ferris Lane: 5.7 Acres, 30% FAR
78,000 SF Light Industrial Uses

E - Whipple Road: 6.9 Acres, 30% FAR
91,500 SF Light Industrial Uses

F - 2.6 Acres, 30% FAR
34,000 SF Light Industrial Uses

G - 0.9 Acres, 30% FAR
11,500 SF Light Industrial Uses

H- Lindsey Property: 5.2. Acres, 25% FAR
56,000 SF Industrial Uses
Merged Last Year With 0.8 Parcel to the South

I - Texas Lane Single Family: 2.0 Acres
Existing Single Family Homes

**TOTAL DEVELOPMENT POTENTIAL IN
ANNEXATION AREA AND SANTA PAULA
EAST GATEWAY SP AREA:**

Retail Commercial Uses	560,000 SF
Light Industrial Uses	283,500 SF
Industrial Uses	56,000 SF

SOURCE: City of Santa Paula - September 2011

FIGURE E-2