
APPENDIX

Appendix A Urban Decay Study



KEYSER MARSTON ASSOCIATES™
ADVISORS IN PUBLIC/PRIVATE REAL ESTATE DEVELOPMENT

MEMORANDUM

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To: Kathleen Livermore, AICP, Planning Manager
CDD/City of San Leandro

From: Keyser Marston Associates, Inc.

Date: April 5, 2010

Subject: Kaiser Medical Center / Mixed-Use Retail Development Project
- Urban Decay

This memorandum provides a review of comments to the DEIR for Kaiser Medical Center provided to the City by Bayfair Center (March 10, 2010), as they pertain to potential urban decay from the proposed Mixed-Use Retail Development Project.

The communication from Bayfair includes an analysis (undated) prepared by Retail Focus/Jeff Green Partners, retail consultants to Bayfair.

Background/Project

The proposed project would allow the future development of the northern approximately 25 acres of the site with a 387,000 SF Mixed-Use Retail Development (consisting of large-format stores, multi-tenant retail uses, restaurants, soft goods, and service-oriented retailers) and a mixed-use residential project (consisting of up to 250 one- and two-bedroom apartments) or a hotel of up to 210 rooms. At this time, no specific development application has been submitted to the City for the northern portion of the site. Therefore, the Mixed-Use Retail Development (and Build-Out of the Kaiser Medical Center) was evaluated on a programmatic level in the Draft EIR. Prior to approvals of applications for the Mixed-Use Retail Development and/or Build-Out of the Kaiser Medical Center, additional confirmatory environmental analyses and approvals would be required subsequent to certifications of the Final EIR.

The Mixed-Use Retail Development would be located at the southwest quadrant of the intersection of Marina Boulevard, a major arterial street, with I-880 and would have freeway visibility, thereby enabling retail at the site to serve a sub-regional market

bounded generally by portions of Oakland to the north and Hayward to the south, extending eastward generally to the 580 Freeway and some residential areas east of 580, and residential areas west of the site delimited by San Francisco Bay. (The trade area is more specifically addressed in the commentary below).

Comments to the DEIR

The letter from Bayfair addresses several aspects of the environmental document. The comments that are pertinent to this analysis are focused on potential urban decay impacts.

In respect to urban decay, the letter from Bayfair indicates that the DEIR is inadequate because it does not address the potential that the Project's proposed retail development "will severely impact existing retail centers in San Leandro and the vicinity, and result in blight and urban decay due to store closures, empty storefronts and vacant spaces." To support this contention, the letter includes a report by Retail Focus/Jeff Green Partners that concludes:

- Over 70% of the Bayfair Center's trade area is also in the proposed Kaiser Retail's trade area – "that is significant overlap." "As such, we estimate the sales impact of a 400,000+ sf competitive center at Kaiser would be, at minimum 25%, on Bayfair Center."
- A 25% sales loss at Bayfair Center would result in a significant number of store closures at Bayfair. This could lead to "decay to the point of blight, similar to what has happened at the surrounding Eastmont Mall in Oakland and Baldwin Hills Crenshaw Plaza in Los Angeles."
- Similar effects would occur to other centers in San Leandro.

The Retail Focus/Jeff Green Partners Report includes a delineation of the respective trade areas of the Bayfair Center and the Kaiser Site and the demographics of the trade areas. The trade areas are identified as the geographic areas from which approximately 60% to 70% of sales originate or are projected to originate.

The Bayfair trade area was reportedly delineated based on shopper interviews; the Kaiser trade area was delineated based on the experience of the consultant "in defining over 10,000 trade areas for shopping centers and retailers."

The Bayfair trade area delineated in the Retail Focus/Jeff Green Partners Report contains 240,100 persons (2009). The Kaiser trade area delineated in that report contains 279,300 persons (2009). More than 70% of Bayfair's trade area is also in Kaiser's trade area; therefore, the demographic characteristics of the population are highly similar, with average household incomes of \$70,000 to \$75,000.

The Retail Focus/Jeff Green Partners Report cites Eastmont Mall in Oakland and Baldwin Hills Crenshaw Plaza in Los Angeles as examples of urban decay that could occur in San Leandro as a result of the Mixed-Use Retail Development; in respect to Crenshaw, "it is our professional opinion that a similar scenario may also play out at Bayfair Center should a 400,000+ sf competitive center open at the Kaiser site."

Response to Comment

To review the comments summarized above, KMA has undertaken the following activities:

- Reviewed the trade area delineations and demographics;
- Quantified the retail spending power in the trade areas and compared them to Bayfair sales and potential sales at the Kaiser Site;
- Reviewed all of the competitive retail centers in the field;
- Reviewed the experience at Eastmont Mall and Baldwin Hills Crenshaw Plaza as it pertains to urban decay. (KMA is consultant to the Community Redevelopment Agency of the City of Los Angeles and has consulted to the Agency in respect to revitalization issues at this center).

In this review, population estimates are for 2014 (modest increase over 2009), with incomes and expenditures reported in 2009 dollars. Numerical estimates are frequently rounded in the text.

We have concluded the following from our analysis:

- Since the Mixed-Use Retail Development identified in the DEIR could feature a variety of potential retail concepts with markedly different potential impacts on existing retailers, it is premature to conclude as to potential urban decay impacts;

- The analysis provided in the communication noted above is far from conclusive in demonstrating the potential for urban decay even for a retail concept that would be potentially competitive with Bayfair;
- Even if the retail concept focused on store types represented at Bayfair (not assured), the share of trade area sales at the Kaiser Site would be small, at about 10% of trade area potential for these stores; this would not be a dominant center and would not, therefore, likely cause urban decay.
- Bayfair currently captures only a small share of retail spending for shoppers' goods by residents of the Bayfair trade area identified in the Retail Focus/Jeff Green Partners Report; therefore, it is unrealistic to portray that a high proportion of retail sales at the Kaiser Site, even if focused on similar store types, would be at the expense of Bayfair;
- Data from Claritas indicate that the trade area within a ten minute drive time of the Kaiser Site is underserved for shoppers' goods, with sales potential exceeding sales by more than \$200 million annually; therefore, retail at the Kaiser Site focused on shoppers' goods could serve an unmet demand;
- The Eastmont and Crenshaw examples do not in the least support an urban decay finding for this project.

The following discussion amplifies on the conclusions noted above.

Retail Concept/Tenancies

The DEIR does not identify a specific development concept or store types that could constitute the Mixed-Use Retail Development. These are illustrative possibilities, each of which would have a markedly different impact on existing retail stores:

- (1) *Center comprised primarily of mid to larger retail boxes, including outlets retailing primarily GAFO merchandise (general merchandise, apparel, furniture and home furnishings, and specialty goods such as sports equipment).* This concept would presumably be that which is of the greatest concern to Bayfair since it is most closely aligned with retailing at the center; however, as noted below, even within this rubric there is considerable likelihood that a project that included these uses would not cause urban decay.

- (2) *Center inclusive of major building materials stores/home improvement.* These uses might occupy up to about half of the site and would be minimally competitive with Bayfair.
- (3) *Center incorporating, as one of the elements, a notable component of grocery/convenience goods focused on the 27,000 residents of San Leandro residing west of I-880 and just to the east of the site across the freeway, west of San Leandro Boulevard.* This retail component could occupy up to about 40% of the site and would be minimally competitive with Bayfair.
- (4) *Center incorporating a notable component of automotive sales, which might occupy most or all the site.* This concept would not be competitive with Bayfair.
- (5) *Combination of 1-4, in which (1) is a somewhat minor or absent element.* This approach would yield a retail project that would be minimally competitive with Bayfair or not competitive at all with that center.

The client advises that at no time to-date has there been a proposal to bring large department stores such as Macy's, Nordstrom's or JC Penney to the Kaiser Site.

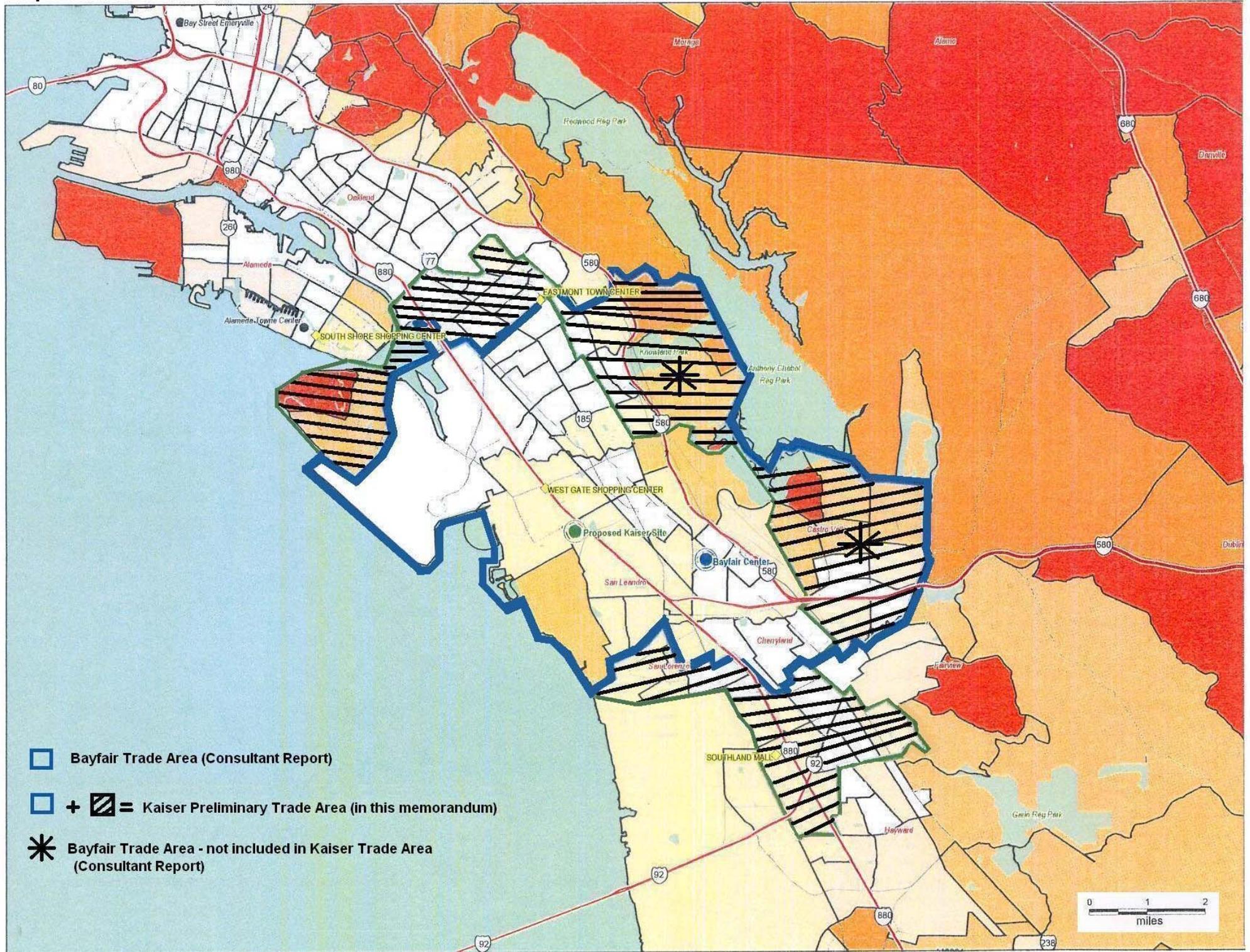
The retail concepts noted above would have markedly different competitive impacts on existing retail establishments, and none of the concepts can be definitively included or excluded at the present time.

Trade Areas

Readers should refer to the accompanying map, which delineates all of the areas discussed below.

The trade area for Bayfair was delineated in the Retail Focus/Jeff Green Partners Report based on shopper intercepts. The trade so defined extends west to San Francisco Bay; east, to hill areas in Oakland and San Leandro and to Castro Valley (unincorporated Alameda County); south, several miles to Hayward; and, north to the southern flatland areas of Oakland. The Bayfair center does not have the tenant base and regional accessibility to draw significant trade from areas to the north (Oakland/Berkeley) and is limited to the south by shopping centers in Hayward (Southland) and Union City (Union Landing). Within the trade area there are 240,000 persons with an aggregate household income of \$6.2 billion and spending potential for GAFO of \$910 million annually (Claritas estimates).

Map 1: Trade Areas



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The trade area for the Kaiser Site delineated in the Retail Focus/Jeff Green Partners Report is inclusive of a population base of 284,000, which is substantially less than the population within only a ten minute drive of this sub-regional retail site, based on data from Claritas contained in the Appendix. Those data indicate that 386,000 persons reside within a ten minute drive time of the Kaiser Site.

The trade area delineated in the Retail Focus/Jeff Green Partners Report for the Kaiser Site includes areas along the I-880 corridor to the north and south of the Bayfair trade area, including portions of the City of Alameda; this delineation recognizes the sub-regional accessibility of the site. However, the trade area so defined excludes the hill areas in San Leandro and Oakland, and Castro Valley, which are part of the Bayfair trade area. These exclusions appear unwarranted in view of travel times and retail representation. In respect to travel times, the geographic center of Castro Valley is an 8-minute drive to the Kaiser Site via the 580/880 Freeways, and the hill areas in Oakland and San Leandro are 11-14 minutes to the Kaiser Site (Google Maps). *It is not credible that retail tenants considering representation at the Kaiser Site would exclude the spending power of population residing approximately 10 minutes from the site, particularly since there is little GAFO retail in Castro Valley and virtually none in the hill areas, which have been excluded in the Retail Focus/Jeff Green Partners Report. There are no intervening centers of major scale to intercept shopping trips to the Kaiser Site.* The result of including these areas is to incorporate 71,000 persons with total household income of \$3.3 billion into the Kaiser trade area.

The statement in the Retail Focus/Jeff Green Partners Report: "The Kaiser Site's location on a regional interstate, I-880, allows it to pull from a greater distance; thus resulting in a larger trade area population..." is conceptually correct; however, the conclusion, "and [results in] a greater sales impact on Bayfair" is illogical in that the Kaiser Site would be pulling from a market area that is not part of the Bayfair trade area. In this regard, the demographics in the Retail Focus/Jeff Green Partners Report indicate that more than 110,000 persons in the Kaiser trade area do not reside in the Bayfair Trade area (are unique to Kaiser).

From the preceding considerations, the metrics of the trade areas are as follows:

Demographics and Retail Spending (GAFO) for San Leandro Trade Areas					
<i>Trade Area</i>	<i>Population (2014)</i>	<i># HH (2014)</i>	<i>Average HH Income (\$ 2009)</i>	<i>Total HH Income (\$M 2009)</i>	<i>Retail Spending/ GAFO (\$M 2009) ⁴</i>
Bayfair ¹	243,600	83,000	\$74,400	\$6,175	\$910
Kaiser ¹	284,200	91,600	\$71,200	\$6,520	\$960
Kaiser ²	355,200+	117,500	\$74,600	\$8,760	\$1,290
Unique ³	111,600	34,500	\$74,900	\$2,585	\$390

¹ Per delineation by Retail Focus/Jeff Green Partners (Claritas data in all instances)

² With inclusion of areas in the hill areas of San Leandro and Oakland, and Castro Valley (see discussion). Ten minute drive population totals 378,000 persons.

³ Portion of Kaiser Trade Area not included in Bayfair Trade Area per Retail Focus/Jeff Green Partners Report.

⁴ Per Claritas for Kaiser Trade Area, extrapolated to others given highly similar incomes.

The demographic data indicate that the trade area that includes the two centers has a population of more than 350,000 persons with total household income of \$8.8 billion and \$1.3 billion per year in spending on GAFO. The more than 110,000 persons and 34,000 households that reside in a trade area that is unique to Kaiser (not shared with Bayfair), has total household income of \$2.6 billion and retail spending for GAFO of \$390 million.

Our analysis of sales tax data for Bayfair indicates that current GAFO sales are approximately \$115 million annually, which is a small share of GAFO potential of residents in the Bayfair trade area delineated in the Retail Focus/Jeff Green Partners Report.

These observations emerge from review of the data noted above:

- Bayfair is currently absorbing about 10%-15% of the GAFO sales potential in the trade area delineated in the Retail Focus/Jeff Green Partners Report; therefore, many other centers and freestanding retailers such as Wal-Mart are absorbing the retail potential of trade area residents. It is not, therefore, realistic to portray a situation in which a high proportion of the sales at the Kaiser Site would be a deduction in sales from Bayfair – many other stores and centers exist in the trade area, and area residents are undoubtedly making many expenditures at stores outside the trade area as well (see below).
- GAFO sales potential unique to Kaiser (not in the Bayfair trade area) is \$390 million based on the demographics in the Retail Focus/Jeff Green Partners Report and is more than sufficient to support a GAFO-based retail project at the Kaiser Site.

- That the trade areas largely overlap is not at all determinative in respect to retail impact, and it is therefore not at all apparent how the 25% sales loss identified in the Retail Focus/Jeff Green Partners Report was developed. An “either/or” scenario (shop at Bayfair or Kaiser Site) misconstrues the reality of the retail inventory and spending patterns in the trade areas.

- Even if the Kaiser Site were entirely developed for GAFO retail, its’ share of GAFO retail potential would be small and the Project would not be a dominant center, as follows: (1) 432,000 square feet times a sales volume of \$350 per square foot (representative sales volume) would result in \$150 million in sales. (2) If 2/3s of the sales were from trade area residents, \$100 million would be from trade area residents. (3) GAFO potential in the trade area is \$1.29 billion (see previous inset table). Therefore, the Kaiser share of GAFO would be less than 8.0% - would not be a dominant presence in a trade area within 10 minute drive time of the site. (If the Kaiser trade area were defined as identified in the Retail Focus/Jeff Green Partners Report, the GAFO share for the Kaiser site would increase slightly to 10.4%).

In respect to overall demand/supply for GAFO, data from Claritas indicate that, on balance, the trade area encompassing Kaiser and Bayfair is underserved. The following table shows their estimates of retail demand and supply and the gap or surplus by the separate components of GAFO:

Trade Area Demand, Supply, and Gap/Surplus For GAFO, 2009 (\$ Millions)				
	<i>Demand</i>	<i>Supply</i>	<i>Gap/(Surplus)</i>	<i>Conclusion</i>
General Mdse.	\$666	\$704	(\$38)	Moderately oversupplied
Apparel	\$237	\$116	\$122	Severely undersupplied
Furniture/HF	\$103	\$92	\$11	Moderately undersupplied
Electronics/App.	\$122	\$51	\$71	Severely undersupplied
Sporting Goods/Other Spec.	\$98	\$44	\$54	Severely undersupplied
Office Supplies, Stationery, Gifts	\$48	\$24	\$24	Severely undersupplied
Total	\$1,274	\$1,031	\$244	Moderately undersupplied

Source: Claritas, RMP Opportunity Gap – Retail Stores (numerical estimates).

As noted, all store types are underrepresented with the exception of general merchandise stores, which are moderately overrepresented.

The Claritas estimate is that the trade area is currently underserved for GAFO by \$244 million; therefore, a large volume of sales are lost to retailers located outside the trade area. Since the Kaiser Site has direct freeway access and exposure, it may be anticipated that a wide range of tenants some of whom are not represented between about Emeryville and Fremont, could be attracted to the site. The most evident gap in retail representation in this trade area is the absence of a major electronics store such as Fry's or Best Buy; since Bayfair does not include a notable presence of electronics retail, the likely impact on Bayfair of inclusion of these stores would be minimal.

Other illustrative stores that are not represented include Office Max, Borders, Barnes & Noble, TJ Maxx, and Babies 'R Us. Lowe's home improvement (non-GAFO) is not represented in the I-880 corridor north of Union City and could be a participant as well, among others. It is known that Safeway is aggressively seeking to improve their presence in markets in Northern California; they could be a candidate for a new store at this site. Trader Joe's is another potential entrant into this market. (Note: All mention of tenancies in this report should be regarded as "illustrative," since retailers are constantly reevaluating their priorities and market strategies – it is not now possible to identify specific retailers that will commit to take space at the Kaiser Site or at any other center at some time in the future).

Since there are virtually no other comparable retail sites on the I-880 in proximity to the trade area, it is possible/likely that stores located elsewhere in the trade area or in adjacent trade areas will also seek dual representation at the Kaiser Site.

It should be recognized that all of the comments directly above (except in respect to Lowe's and Safeway) apply to an exclusively GAFO-based tenanting of the retail at the Kaiser Site, and therefore constitutes a "worst case" since that concept most nearly overlaps Bayfair. However, at this time there is no reason to conclude that this is the concept that will be put in place in light of alternatives that may be available for build-out of the Mixed-Use Retail Development.

Comparable Situations/Urban Decay

The Retail Focus/Jeff Green Partners report indicates that experience of urban decay at Eastmont Mall in Oakland and Baldwin Hills Crenshaw in Los Angeles are examples of urban decay.

To be useful and demonstrative in this context, the examples must demonstrate a nexus between introduction of retail competition and resulting urban decay, with a careful parsing of a variety of factors such as access, demographics, social conditions, etc. to arrive at meaningful conclusions.

Neither of the examples that have been advanced convey a meaningful message in respect to potential urban decay resulting from the Mixed-Use Retail Development. Neither has declined as a result of the introduction of retail competition in the trade areas:

- Eastmont Mall opened in 1970 with JC Penney, Mervyn's and Safeway as the anchors. By the early 1990's the anchors were gone and the center entered a period of steep decline. Today the mall is entirely vacant, though there is an independent market, a discount store, and other tenants opening to the parking lot on the west side of the property. Key factors propelling the downward trend in this center were declining demographics and security, which made it impossible for the center to draw trade from hill areas immediately to the east, or from other of the more affluent areas of Oakland. During the time when the mall experienced its decline, virtually no new retail of any note was introduced in the trade area or, indeed, in the entire City of Oakland. Wal-Mart opened at Hegenberger Road and the I-880 freeway several miles from Eastmont in 2005; however, Eastmont's decline antedated the Wal-Mart opening by many years, as it did the opening of the East Bay Bridge (big box) project straddling Oakland and Emeryville, which occurred in 1998. The only newly-developed centers that could be construed as competitive to Eastmont during the period of its decline were Marina Square and Greenhouse Marketplace, at the southern end of Eastmont's trade area, in San Leandro. During this period, the swath of urban geography extending from Oakland through Emeryville, Berkeley, Albany and El Cerrito was widely recognized in the retail industry as being vastly understored. None of the original anchors at Eastmont migrated to competitive centers in the trade area. *Eastmont is an example a center that declined despite the virtual absence of new retail competition.*
- In respect to Baldwin Hills Crenshaw Plaza, the Retail Focus/Jeff Green Partners Report identifies impacts from Fox Hills. The renovated Fox Hills Mall opened at the end of the 2009 – before that, it was universally regarded as a severely depressed retail situation and could not account for problems at the Crenshaw center. In any event, regardless of history, the Crenshaw center was recently sold to a Chicago real estate investor for \$136 million, reportedly twice the price for which the property was purchased by the previous buyer in 2003. The new

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buyer plans to improve and expand the mall, which is almost fully leased. Therefore, an urban decay verdict on this property is inappropriate. *The Crenshaw center is an example of the continued recycling of an existing retail property serving a minority community.*

Other Center/Southland

The Bayfair trade area is limited to the south by Southland Shopping Center, an older shopping mall anchored by JC Penney, Macy's, Sears and Kohl's. The Retail Focus/Jeff Green Partners Report refers to "continued upgrading" of this center. Although new restaurants have opened in recent years at the periphery of the center property, there is no physical evidence of upgrading of the mall, and the center has not submitted any plans to the City of Hayward.

Urban Decay

Store closures in and of themselves do not constitute urban decay if the properties so affected can be recycled to other productive uses. The Bayfair site is strongly advantaged by its proximity to transit (BART), and there may be many opportunities to recycle property in the future to a variety of productive urban uses. However, until potential impacts can be more clearly identified, it is premature to speculate on the nature and extent of recycling, if any, that could occur.

Appendix A: Drive Time Population/Kaiser Site

Pop-Facts: Demographic Quick Facts Report

DrvTim 1: MARINA BLVD AT MERCED ST, SAN LEANDRO, CA 94577, aggregate

DrvTim 2: MARINA BLVD AT MERCED ST, SAN LEANDRO, CA 94577, aggregate

DrvTim 3: MARINA BLVD AT MERCED ST, SAN LEANDRO, CA 94577, aggregate

Description	10 Minute(s) <i>DrvTim 1</i>		15 Minute(s) <i>DrvTim 2</i>		20 Minute(s) <i>DrvTim 3</i>	
	%	%	%	%		
Population						
2014 Projection		386,107		851,344		1,406,983
2009 Estimate		378,438		830,670		1,358,051
2000 Census		376,471		818,627		1,304,920
1990 Census		322,758		720,578		1,160,378
Growth 1990 - 2000		16.64%		13.61%		12.46%
Households						
2014 Projection		122,854		290,846		502,713
2009 Estimate		121,999		286,336		487,419
2000 Census		125,248		288,982		475,660
1990 Census		118,087		270,025		436,418
Growth 1990 - 2000		6.06%		7.02%		8.99%
2009 Est. Population by Single Classification Race						
		378,438.00		830,670.00		1,358,051.00
White Alone	143,471	37.91	297,101	35.77	571,673	42.10
Black or African American Alone	61,553	16.27	150,855	18.16	193,480	14.25
American Indian and Alaska Native Alone	3,245	0.86	6,041	0.73	8,780	0.65
Asian Alone	68,446	18.09	200,400	24.13	340,613	25.08
Native Hawaiian and Other Pacific Islander Alone	4,628	1.22	7,913	0.95	10,177	0.75
Some Other Race Alone	71,509	18.90	113,480	13.66	146,655	10.80
Two or More Races	25,586	6.76	54,879	6.61	86,673	6.38
2009 Est. Population Hispanic or Latino						
		378,438.00		830,670.00		1,358,051.00
Hispanic or Latino	143,898	38.02	233,592	28.12	309,906	22.82
Not Hispanic or Latino	234,540	61.98	597,078	71.88	1,048,145	77.18
2009 Tenure of Occupied Housing Units						
		121,999.00		286,336.00		487,419.00
Owner Occupied	63,764	52.27	142,914	49.91	250,419	51.38
Renter Occupied	58,235	47.73	143,422	50.09	236,999	48.62
2009 Average Household Size						
		3.05		2.86		2.73



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DrvTim 3: MARINA BLVD AT MERCED ST, SAN LEANDRO, CA 94577, aggregate

Description	10 Minute(s)		15 Minute(s)		20 Minute(s)	
	<i>DrvTim 1</i>	%	<i>DrvTim 2</i>	%	<i>DrvTim 3</i>	%
2009 Est. Households by Household Income	121,999.00		286,336.00		487,419.00	
Income Less than \$15,000	13,054	10.70	33,543	11.71	51,049	10.47
Income \$15,000 - \$24,999	10,412	8.53	24,089	8.41	35,895	7.36
Income \$25,000 - \$34,999	11,671	9.57	25,499	8.91	37,521	7.70
Income \$35,000 - \$49,999	18,178	14.90	39,498	13.79	58,661	12.04
Income \$50,000 - \$74,999	25,631	21.01	54,534	19.05	86,422	17.73
Income \$75,000 - \$99,999	17,264	14.15	38,580	13.47	67,305	13.81
Income \$100,000 - \$149,999	17,137	14.05	43,014	15.02	82,991	17.03
Income \$150,000 - \$249,999	7,071	5.80	22,138	7.73	50,765	10.42
Income \$250,000 - \$499,999	1,235	1.01	4,196	1.47	11,959	2.45
Income \$500,000 and over	346	0.28	1,245	0.43	4,851	1.00
2009 Est. Average Household Income	70,331.56		75,455.96		87,990.94	
2009 Est. Median Household Income	57,495.51		59,415.74		67,525.43	
2009 Est. Per Capita Income	23,013.76		26,331.05		31,939.73	



Pop-Facts: Demographic Quick Facts Report

Appendix: Area Listing

Area Name:

Type: Drive Time 1: 10 Minute(s) Reporting Detail: Aggregate Reporting Level: Block Group
MARINA BLVD AT MERCED ST, SAN LEANDRO, CA 94

Polygon Points:

37.593498 -122.059883	37.604900 -122.073418	37.614876 -122.074844	37.614876 -122.085533
37.620579 -122.086250	37.625568 -122.096939	37.622005 -122.104782	37.629131 -122.111908
37.621292 -122.121170	37.618443 -122.144691	37.637684 -122.120461	37.654076 -122.133286
37.660488 -122.127586	37.656212 -122.114754	37.665478 -122.123306	37.664051 -122.153954
37.668327 -122.161079	37.689709 -122.168205	37.693985 -122.194580	37.703964 -122.191727
37.712517 -122.198853	37.721779 -122.196716	37.710377 -122.203842	37.710377 -122.214531
37.716080 -122.216667	37.718929 -122.209541	37.723919 -122.219521	37.723919 -122.203133
37.738884 -122.219521	37.743160 -122.215248	37.733185 -122.208122	37.735321 -122.203133
37.741024 -122.208832	37.749577 -122.207405	37.761692 -122.221657	37.755276 -122.224510
37.754562 -122.234489	37.765968 -122.235199	37.765968 -122.243042	37.781647 -122.240906
37.787346 -122.260147	37.796612 -122.269409	37.786636 -122.223083	37.780933 -122.219521
37.782360 -122.205269	37.768105 -122.201706	37.765255 -122.179611	37.758839 -122.178902
37.755989 -122.169632	37.758839 -122.149681	37.768818 -122.156807	37.772381 -122.153244
37.757416 -122.141838	37.748150 -122.147537	37.736748 -122.129013	37.731045 -122.129013
37.731045 -122.116898	37.724632 -122.111908	37.726055 -122.119743	37.721069 -122.122597
37.715366 -122.106201	37.706814 -122.105492	37.709663 -122.089104	37.703964 -122.079834
37.710377 -122.072708	37.701824 -122.066292	37.705387 -122.059166	37.697548 -122.045624
37.703964 -122.037071	37.704678 -122.014984	37.698261 -122.020683	37.699688 -122.034935
37.691135 -122.056320	37.682583 -122.055603	37.674030 -122.073418	37.654076 -122.077698
37.649086 -122.069855	37.636257 -122.084824	37.639820 -122.077698	37.632694 -122.066292
37.623428 -122.075562	37.618443 -122.062729	37.613453 -122.068436	37.596348 -122.055603
37.593498 -122.059883	37.618443 -122.062729	37.613453 -122.068436	37.596348 -122.055603

Area Name:

Type: Drive Time 2: 15 Minute(s) Reporting Detail: Aggregate Reporting Level: Block Group
MARINA BLVD AT MERCED ST, SAN LEANDRO, CA 94

Polygon Points:

37.527260 -122.005836	37.538963 -122.020729	37.536835 -122.029243	37.558113 -122.036690
37.545345 -122.044136	37.533642 -122.072861	37.543217 -122.071800	37.548538 -122.061165
37.554920 -122.064354	37.560242 -122.046265	37.568752 -122.068611	37.578327 -122.063286
37.577263 -122.083504	37.592159 -122.093079	37.602798 -122.089890	37.617691 -122.111168
37.615562 -122.124992	37.621948 -122.130318	37.590031 -122.238838	37.596413 -122.238838



Pop-Facts: Demographic Quick Facts Report

Appendix: Area Listing

Area Name:

Type: Drive Time 2: 15 Minute(s) Reporting Detail: Aggregate Reporting Level: Block Group
MARINA BLVD AT MERCED ST, SAN LEANDRO, CA 94

Polygon Points:

37.628330 -122.131378	37.645355 -122.140953	37.644291 -122.157974	37.658119 -122.160103
37.661312 -122.142021	37.667694 -122.162231	37.688972 -122.168617	37.693230 -122.195213
37.713444 -122.199471	37.708126 -122.213303	37.724083 -122.228195	37.718765 -122.237770
37.742168 -122.252663	37.750683 -122.248413	37.759193 -122.265434	37.775150 -122.272881
37.784725 -122.256920	37.788982 -122.272881	37.781536 -122.268623	37.776215 -122.279266
37.793240 -122.280327	37.793240 -122.304794	37.802814 -122.304794	37.808132 -122.320755
37.819836 -122.300545	37.824093 -122.326073	37.829411 -122.310120	37.824093 -122.294159
37.843243 -122.298416	37.830475 -122.288841	37.828346 -122.269691	37.842178 -122.270752
37.852818 -122.237770	37.826218 -122.262238	37.808132 -122.233513	37.810261 -122.210106
37.800686 -122.192024	37.809196 -122.204788	37.823029 -122.202660	37.795364 -122.170746
37.780472 -122.164360	37.771961 -122.129250	37.751743 -122.114357	37.744297 -122.119675
37.742168 -122.139893	37.718765 -122.103722	37.726212 -122.083504	37.737915 -122.082443
37.743233 -122.071800	37.724083 -122.073929	37.729404 -122.055840	37.718765 -122.051582
37.727276 -122.034561	37.714508 -122.035629	37.713444 -122.016479	37.729404 -121.994133
37.710251 -122.010094	37.716637 -121.985626	37.707062 -121.994133	37.702805 -121.987747
37.704933 -121.914337	37.690037 -121.930298	37.699612 -122.014351	37.693230 -122.018608
37.666634 -121.999451	37.689638 -122.029033	37.675144 -122.028183	37.665569 -122.045204
37.651737 -122.045204	37.648544 -122.060097	37.630459 -122.031372	37.619820 -122.032433
37.616627 -122.042007	37.607052 -122.021797	37.599606 -122.030304	37.569817 -122.019669
37.554920 -122.024986	37.552792 -122.014351	37.541088 -122.014351	37.532578 -122.000519
37.527260 -122.005836	37.552792 -122.014351	37.541088 -122.014351	37.532578 -122.000519

Area Name:

Type: Drive Time 3: 20 Minute(s) Reporting Detail: Aggregate Reporting Level: Block Group
MARINA BLVD AT MERCED ST, SAN LEANDRO, CA 94

Polygon Points:

37.472378 -121.940216	37.528316 -122.073845	37.478592 -122.145325	37.540745 -122.073845
37.615334 -122.108032	37.587364 -122.238556	37.550068 -122.263420	37.546963 -122.319359
37.599792 -122.241661	37.627762 -122.136002	37.646408 -122.163971	37.686810 -122.170189
37.720993 -122.250984	37.752071 -122.260307	37.761395 -122.300713	37.814228 -122.341110
37.770718 -122.390831	37.776932 -122.409477	37.823551 -122.375298	37.842197 -122.306923
37.910564 -122.319359	37.873272 -122.278954	37.870167 -122.241661	37.873272 -122.195045



Pop-Facts: Demographic Quick Facts Report

Appendix: Area Listing

Area Name:

Type: Drive Time 3: 20 Minute(s) Reporting Detail: Aggregate Reporting Level: Block Group
MARINA BLVD AT MERCED ST, SAN LEANDRO, CA 94

Polygon Points:

37.901241 -122.163971	37.873272 -122.163971	37.845303 -122.201263	37.764503 -122.117355
37.767609 -122.067627	37.724102 -122.048981	37.770718 -122.021011	37.752071 -122.008583
37.727211 -122.027229	37.733425 -121.993042	37.714779 -121.996155	37.714779 -121.996155
37.732665 -121.969326	37.761395 -121.974396	37.767609 -121.958862	37.742748 -121.949539
37.705456 -121.800369	37.674377 -121.893600	37.661949 -121.871841	37.627762 -121.878059
37.643303 -121.915352	37.677486 -121.930893	37.696133 -121.993042	37.689919 -122.014801
37.633980 -121.961967	37.674377 -122.017906	37.646408 -122.011688	37.646408 -122.045876
37.584255 -121.977509	37.487915 -121.924675	37.472378 -121.940216	37.646408 -122.045876

Project Information:

Site: 1

Order Number: 968691853



Appendix B: Claritas Potential/Sales Estimates/Kaiser Trade Area, GAFO

RMP Opportunity Gap - Retail Stores

BAYFAIR CTR & KAISER SITE PTA, Tract (see appendix for geographies), Total

Retail Stores	2009 Demand (Consumer Expenditures)	2009 Supply (Retail Sales)	Opportunity Gap/Surplus
Total Retail Sales Incl Eating and Drinking Places	4,840,429,542	5,868,091,990	(1,027,662,448)
Motor Vehicle and Parts Dealers-441	733,225,678	699,229,327	33,996,351
Automotive Dealers-4411	626,184,145	609,632,209	16,551,936
Other Motor Vehicle Dealers-4412	42,312,028	14,934,374	27,377,654
Automotive Parts/Accsrs, Tire Stores-4413	64,729,505	74,662,744	(9,933,239)
Furniture and Home Furnishings Stores-442	103,365,733	91,573,863	11,791,870
Furniture Stores-4421	56,235,551	59,348,796	(3,113,245)
Home Furnishing Stores-4422	47,130,182	32,225,067	14,905,115
Electronics and Appliance Stores-443	121,718,625	50,756,142	70,962,483
Appliances, TVs, Electronics Stores-44311	91,154,860	37,200,157	53,954,703
Household Appliances Stores-443111	19,936,126	10,327,751	9,608,375
Radio, Television, Electronics Stores-443112	71,218,734	26,872,406	44,346,328
Computer and Software Stores-44312	25,464,609	12,328,778	13,135,831
Camera and Photographic Equipment Stores-44313	5,099,156	1,227,207	3,871,949
Building Material, Garden Equip Stores -444	485,621,732	259,471,076	226,150,656
Building Material and Supply Dealers-4441	446,702,761	251,214,160	195,488,601
Home Centers-44411	185,170,000	83,557,063	101,612,937
Paint and Wallpaper Stores-44412	9,925,032	11,193,043	(1,268,011)
Hardware Stores-44413	38,516,068	54,952,923	(16,436,855)
Other Building Materials Dealers-44419	213,091,661	101,511,131	111,580,530
Building Materials, Lumberyards-444191	83,480,703	39,712,678	43,768,025
Lawn, Garden Equipment, Supplies Stores-4442	38,918,971	8,256,916	30,662,055
Outdoor Power Equipment Stores-44421	5,800,990	727,932	5,073,058
Nursery and Garden Centers-44422	33,117,981	7,528,984	25,588,997
Food and Beverage Stores-445	671,826,938	1,363,627,483	(691,800,545)
Grocery Stores-4451	614,934,222	1,248,228,171	(633,293,949)
Supermarkets, Grocery (Ex Conv) Stores-44511	586,609,527	1,198,476,909	(611,867,382)
Convenience Stores-44512	28,324,695	49,751,262	(21,426,567)
Specialty Food Stores-4452	18,855,456	43,516,249	(24,660,793)
Beer, Wine and Liquor Stores-4453	38,037,260	71,883,063	(33,845,803)
Health and Personal Care Stores-446	260,263,424	316,767,595	(56,504,171)
Pharmancies and Drug Stores-44611	222,932,712	276,738,930	(53,806,218)
Cosmetics, Beauty Supplies, Perfume Stores-44612	9,289,423	9,738,087	(448,664)
Optical Goods Stores-44613	11,073,443	4,762,889	6,310,554
Other Health and Personal Care Stores-44619	16,967,846	25,527,689	(8,559,843)



RMP Opportunity Gap - Retail Stores

BAYFAIR CTR & KAISER SITE PTA, Tract (see appendix for geographies), Total

Retail Stores	2009 Demand (Consumer Expenditures)	2009 Supply (Retail Sales)	Opportunity Gap/Surplus
Gasoline Stations-447	534,699,194	423,819,760	110,879,434
Gasoline Stations With Conv Stores-44711	400,187,628	285,373,379	114,814,249
Other Gasoline Stations-44719	134,511,566	138,446,381	(3,934,815)
Clothing and Clothing Accessories Stores-448	237,844,721	115,992,706	121,852,015
Clothing Stores-4481	170,926,655	75,318,832	95,607,823
Men's Clothing Stores-44811	10,842,937	5,444,427	5,398,510
Women's Clothing Stores-44812	42,452,185	19,962,343	22,489,842
Childrens, Infants Clothing Stores-44813	10,151,624	4,197,551	5,954,073
Family Clothing Stores-44814	92,192,182	29,691,011	62,501,171
Clothing Accessories Stores-44815	4,068,181	1,692,945	2,375,236
Other Clothing Stores-44819	11,219,546	14,330,555	(3,111,009)
Shoe Stores-4482	33,395,753	26,518,363	6,877,390
Jewelry, Luggage, Leather Goods Stores-4483	33,522,313	14,155,511	19,366,802
Jewelry Stores-44831	31,103,872	13,985,859	17,118,013
Luggage and Leather Goods Stores-44832	2,418,441	169,652	2,248,789
Sporting Goods, Hobby, Book, Music Stores-451	97,728,242	43,742,778	53,985,464
Sportng Goods, Hobby, Musical Inst Stores-4511	66,892,722	32,035,339	34,857,383
Sporting Goods Stores-45111	33,022,430	24,730,399	8,292,031
Hobby, Toys and Games Stores-45112	21,152,037	5,170,358	15,981,679
Sew/Needlework/Piece Goods Stores-45113	5,569,111	1,499,010	4,070,101
Musical Instrument and Supplies Stores-45114	7,149,144	635,572	6,513,572
Book, Periodical and Music Stores-4512	30,835,520	11,707,439	19,128,081
Book Stores and News Dealers-45121	20,591,202	4,232,432	16,358,770
Book Stores-451211	19,594,285	3,953,134	15,641,151
News Dealers and Newsstands-451212	996,917	279,298	717,619
Prerecorded Tapes, CDs, Record Stores-45122	10,244,318	7,475,007	2,769,311
General Merchandise Stores-452	665,810,786	704,084,388	(38,273,602)
Department Stores Excl Leased Depts-4521	324,772,423	387,951,488	(63,179,065)
Other General Merchandise Stores-4529	341,038,363	316,132,900	24,905,463
Miscellaneous Store Retailers-453	105,018,654	57,717,489	47,301,165
Florists-4531	8,441,064	3,471,983	4,969,081
Office Supplies, Stationery, Gift Stores-4532	47,664,969	23,820,120	23,844,849
Office Supplies and Stationery Stores-45321	26,812,898	14,700,814	12,112,084
Gift, Novelty and Souvenir Stores-45322	20,852,071	9,119,306	11,732,765
Used Merchandise Stores-4533	10,896,827	6,417,783	4,479,044
Other Miscellaneous Store Retailers-4539	38,015,794	24,007,603	14,008,191
Non-Store Retailers-454	309,493,905	1,335,209,392	(1,025,715,487)
Foodservice and Drinking Places-722	513,811,910	406,099,991	107,711,919
Full-Service Restaurants-7221	230,507,835	160,940,477	69,567,358



RMP Opportunity Gap - Retail Stores

BAYFAIR CTR & KAISER SITE PTA, Tract (see appendix for geographies), Total

Retail Stores	2009 Demand (Consumer Expenditures)	2009 Supply (Retail Sales)	Opportunity Gap/Surplus
Limited-Service Eating Places-7222	215,248,864	199,020,581	16,228,283
Special Foodservices-7223	43,345,547	32,125,422	11,220,125
Drinking Places -Alcoholic Beverages-7224	24,709,664	14,013,511	10,696,153
GAFO *	1,274,133,076	1,029,969,997	244,163,079
General Merchandise Stores-452	665,810,786	704,084,388	(38,273,602)
Clothing and Clothing Accessories Stores-448	237,844,721	115,992,706	121,852,015
Furniture and Home Furnishings Stores-442	103,365,733	91,573,863	11,791,870
Electronics and Appliance Stores-443	121,718,625	50,756,142	70,962,483
Sporting Goods, Hobby, Book, Music Stores-451	97,728,242	43,742,778	53,985,464
Office Supplies, Stationery, Gift Stores-4532	47,664,969	23,820,120	23,844,849

* GAFO (General merchandise, Apparel, Furniture and Other) represents sales at stores that sell merchandise normally sold in department stores. This category is not included in Total Retail Sales Including Eating and Drinking Places.

Claritas' RMP data is derived from two major sources of information. The demand data is derived from the Consumer Expenditure Survey (CE Survey), which is fielded by the U.S. Bureau of Labor Statistics (BLS). The supply data is derived from the Census of Retail Trade (CRT), which is made available by the U.S. Census. Additional data sources are incorporated to create both supply and demand estimates.

The difference between demand and supply represents the opportunity gap or surplus available for each retail outlet in the specified reporting geography. When the demand is greater than (less than) the supply, there is an opportunity gap (surplus) for that retail outlet. For example, a positive value signifies an opportunity gap, while a negative value signifies a surplus.



RMP Opportunity Gap - Retail Stores

Appendix: Area Listing

Area Name: BAYFAIR CTR & KAISER SITE PTA

Type: List - Tract

Reporting Detail: Aggregate

Reporting Level: Tract

<u>Geography Code</u>	<u>Geography Name</u>	<u>Geography Code</u>	<u>Geography Name</u>
06001407300	06001-407300	06001407400	06001-407400
06001407500	06001-407500	06001407700	06001-407700
06001408400	06001-408400	06001408500	06001-408500
06001408600	06001-408600	06001408700	06001-408700
06001408800	06001-408800	06001408900	06001-408900
06001409000	06001-409000	06001409100	06001-409100
06001409200	06001-409200	06001409300	06001-409300
06001409400	06001-409400	06001409500	06001-409500
06001409600	06001-409600	06001409700	06001-409700
06001409800	06001-409800	06001409900	06001-409900
06001410000	06001-410000	06001410100	06001-410100
06001410200	06001-410200	06001410300	06001-410300
06001410400	06001-410400	06001428301	06001-428301
06001428302	06001-428302	06001430200	06001-430200
06001430300	06001-430300	06001430400	06001-430400
06001430500	06001-430500	06001430600	06001-430600
06001430700	06001-430700	06001430800	06001-430800
06001430900	06001-430900	06001431000	06001-431000
06001431100	06001-431100	06001431200	06001-431200
06001432100	06001-432100	06001432200	06001-432200
06001432300	06001-432300	06001432400	06001-432400
06001432500	06001-432500	06001432600	06001-432600
06001432700	06001-432700	06001432800	06001-432800
06001433000	06001-433000	06001433101	06001-433101
06001433102	06001-433102	06001433200	06001-433200
06001433300	06001-433300	06001433400	06001-433400
06001433500	06001-433500	06001433600	06001-433600
06001433700	06001-433700	06001433800	06001-433800
06001433900	06001-433900	06001434000	06001-434000
06001435500	06001-435500	06001435600	06001-435600
06001435700	06001-435700	06001435800	06001-435800
06001435900	06001-435900	06001436000	06001-436000
06001436100	06001-436100	06001436200	06001-436200
06001436300	06001-436300	06001436500	06001-436500



RMP Opportunity Gap - Retail Stores

Appendix: Area Listing

06001436601	06001-436601	06001436602	06001-436602
06001436700	06001-436700	06001436800	06001-436800
06001436900	06001-436900	06001437000	06001-437000
06001437300	06001-437300	06001437400	06001-437400

Project Information:

Site: 1

Order Number: 968680628

