

CITY OF



# ***Uptown Business District***

## **Kosmont Retail NOW!® & Residential Market Analysis**

***March 2013***

**Prepared By:  
*Kosmont Companies***

# Project Background & Status

- Kosmont was retained by the City for the preparation of a Retail & Residential Market Analysis for the Uptown Business District (“Uptown”)
- The purpose of the Analysis is to evaluate existing retail & residential sector conditions and develop a strategy to successfully promote economic vitality and growth for Uptown
- An overview of the Analysis is presented herein

- **Analysis**
  - Demographic and Employment Overview
  - *Summary: Demographics & Employment*
  - Retail Vacancy & Lease Rates
  - Taxable Retail Sales Surplus / Leakage
  - Existing Housing Conditions
- **Strategy**
  - Retail in Uptown
  - Trade Area Retailer Voids
  - *Summary: Retail*
  - Potential for Mixed-Use Residential
  - *Summary: Housing and Mixed-Use*
  - Uptown Opportunity Site Assessment
- **Implementation**
  - Findings
  - Next Steps

## Analysis

- Demographic and Employment Overview
- *Summary: Demographics & Employment*
- Retail Vacancy & Lease Rates
- Taxable Retail Sales Surplus / Leakage
- Existing Housing Conditions

# Demographic and Employment Overview

# Demographic Highlights

## Population & Households

- Population of ~52,200 and ~18,600 households in City in 2012
- Population of ~51,900 and ~18,600 HH's w/in 3 mi of Yucaipa Blvd. & California Street in Uptown
- 0.8% annual population growth projected over next 5 years for City

## Income

- Avg. HH income **\$69,600** in City and \$67,500 within 3 miles of Uptown
- 3.5% to 3.7% annual growth projected for HH income over next 5 years

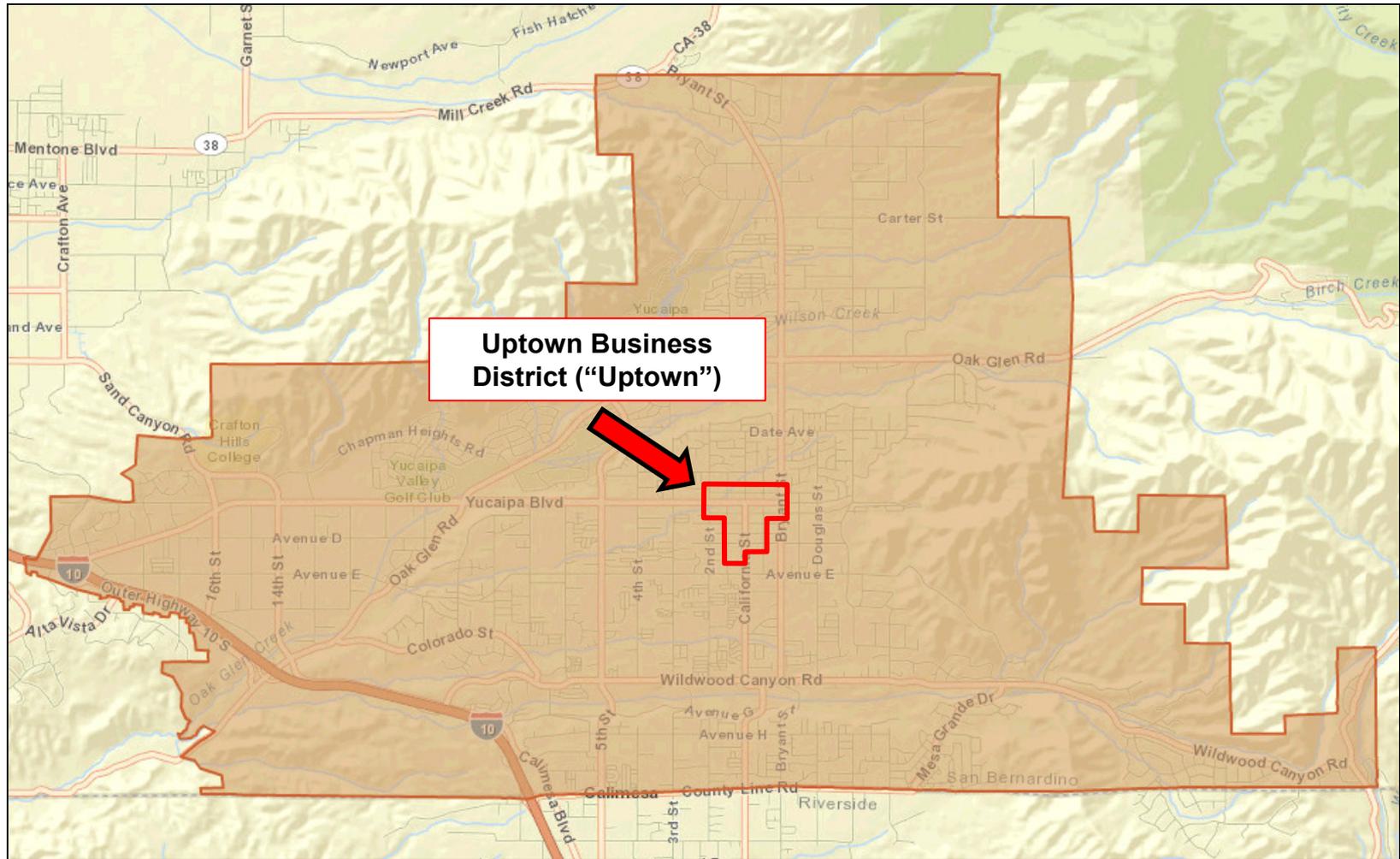
## Age & Race/Ethnicity\*

- Median age of 38 in City & 39 within 3 miles of Uptown
- Population breakdown:
  - 78% White (race) within City
  - 29% Hispanic ethnicity (of any race)\*

\* U.S. Census Bureau defines race and ethnicity as two separate and distinct identities. One Census question asks respondents which socio-political race (e.g. White, Black, Asian) they associate most closely with, and a separate question asks whether they associate with “Hispanic, Latino, or Spanish origin” or not (defined as ethnicity).

**Source:** ESRI projections using US Census (2010) data

# City Limits & Uptown Yucaipa

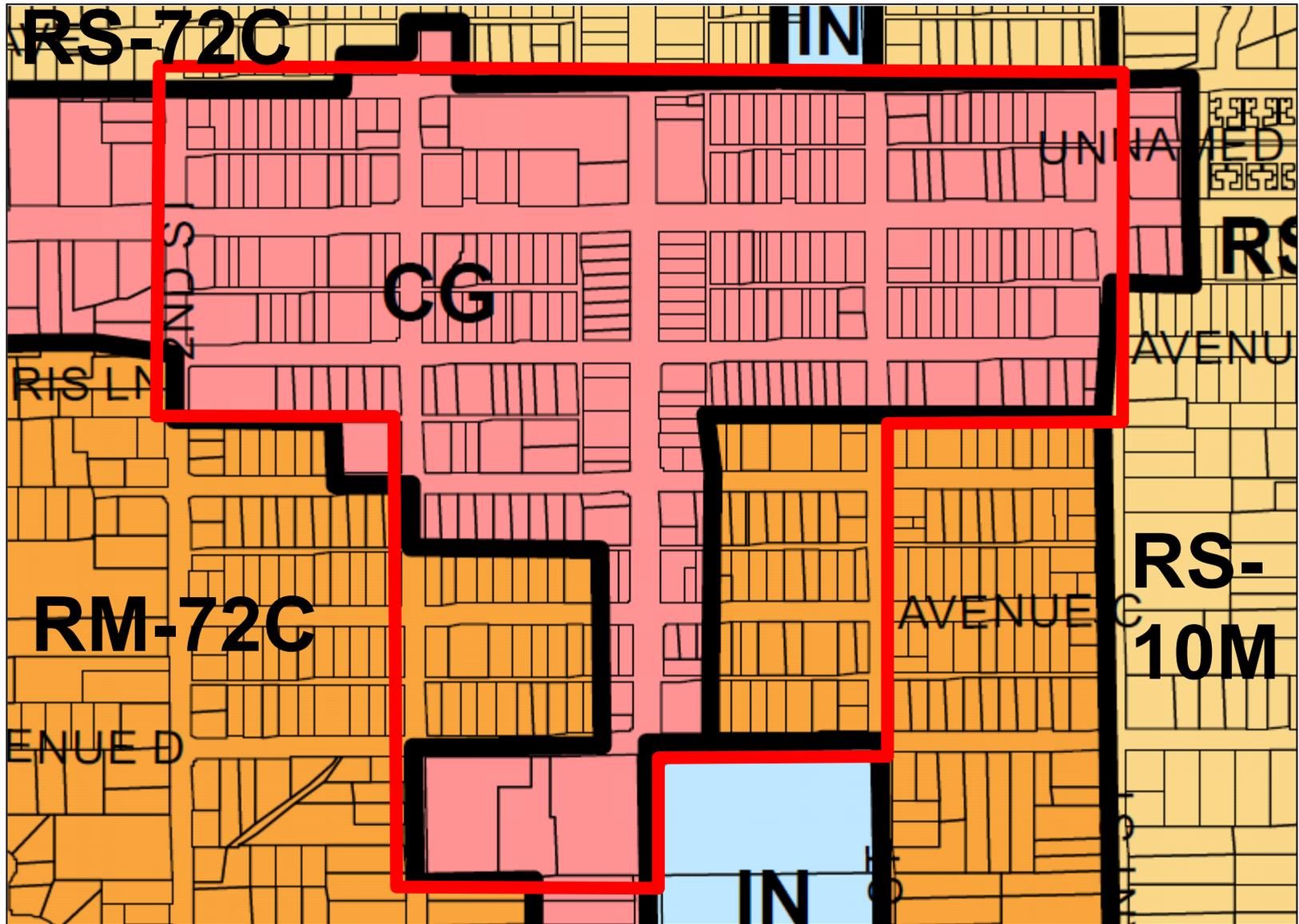


# Uptown Boundaries



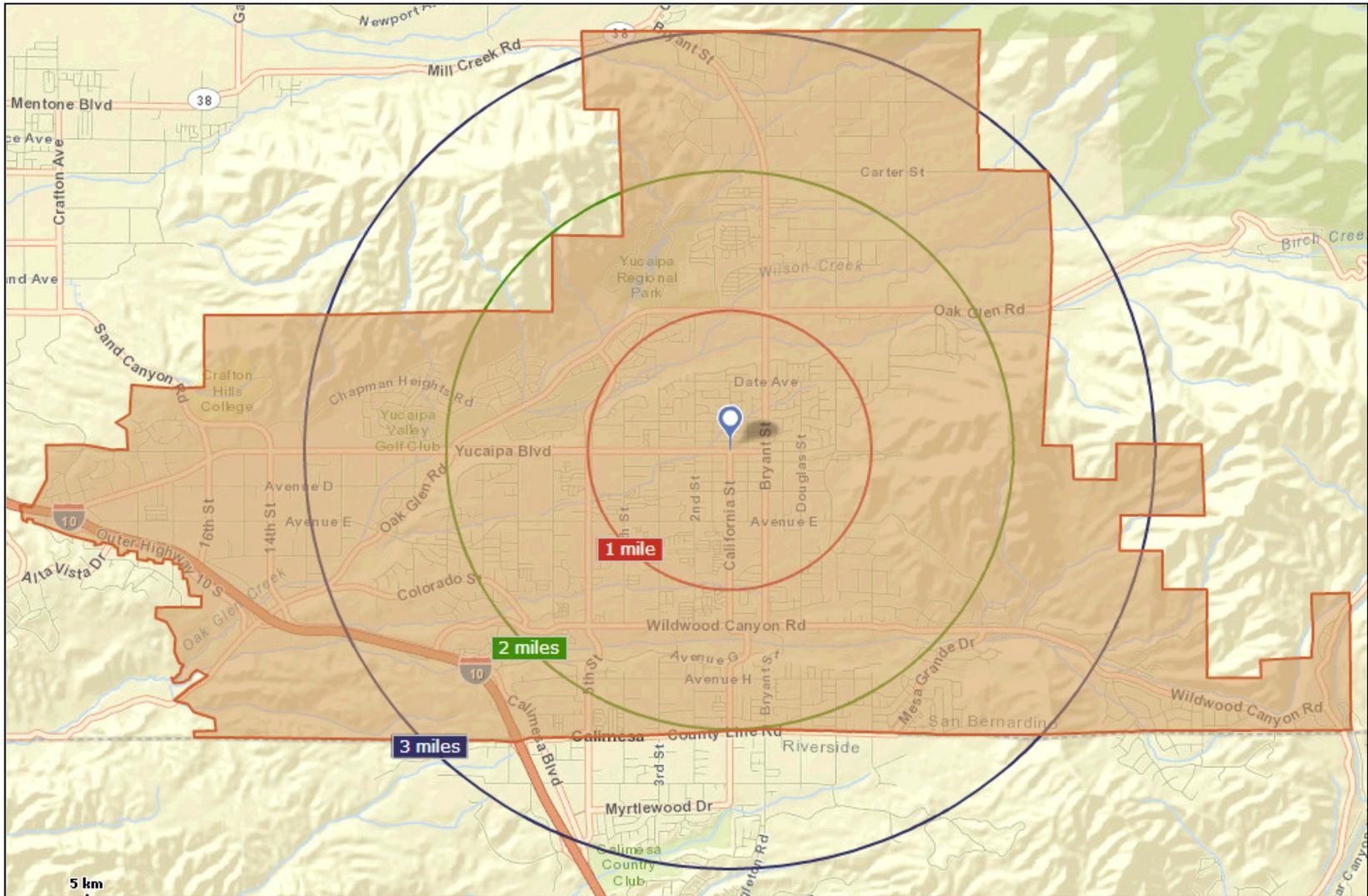
*Red line depicts Uptown boundaries*

# Uptown Land Use District Map



Red line depicts Uptown boundaries

# City Limits & Radii



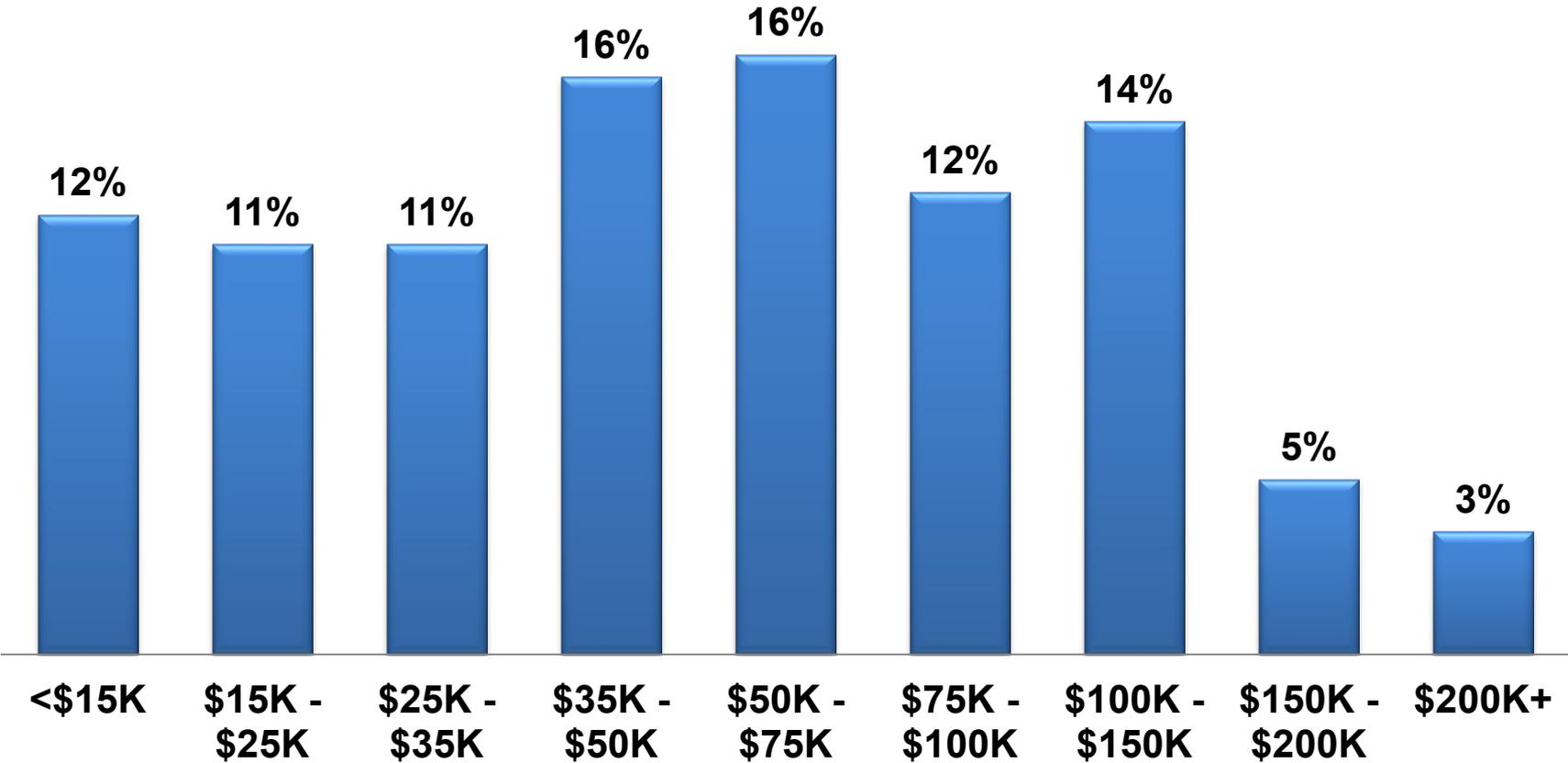
# Population and Income

	<b>Radii (from Yucaipa Blvd. &amp; California St.)</b>			
<b>2012</b>	<b>City</b>	<b>1 Mile</b>	<b>2 Miles</b>	<b>3 Miles</b>
<b>Population</b>	52,176	14,258	35,806	51,889
<b>Households</b>	18,609	5,184	12,974	18,639
<b>Average HH Size</b>	2.77	2.73	2.73	2.75
<b>Median Age</b>	38.1	35.2	38.0	38.5
<b>Per Capita Income</b>	\$25,213	\$22,370	\$24,699	\$24,659
<b>Median HH Income</b>	\$50,734	\$41,380	\$59,561	\$50,014
<b>Average HH Income</b>	\$69,563	\$61,266	\$67,505	\$67,494
<b><u>2012-2017 Annual Growth Rate</u></b>				
<b>Population</b>	0.84%	0.71%	0.82%	0.76%
<b>Median HH Income</b>	3.53%	3.72%	3.59%	3.28%

Source: U.S. Census Bureau (2010); ESRI (2013)

# Income Profile

**City of Yucaipa – 2012 Population by Income Bracket**

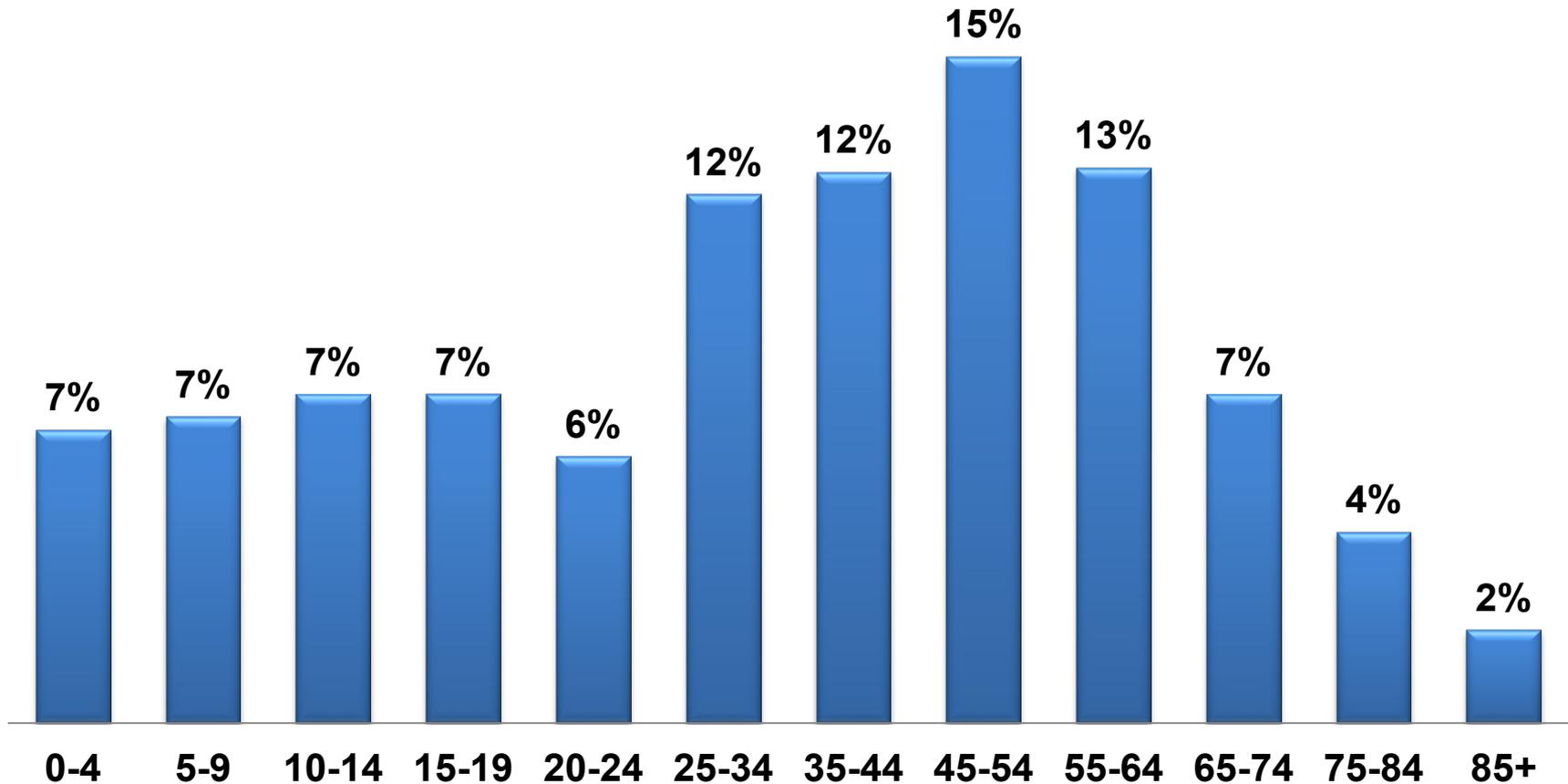


Source: U.S. Census Bureau (2010); ESRI (2013)



# Age Profile

City Population by Age Bracket in 2012

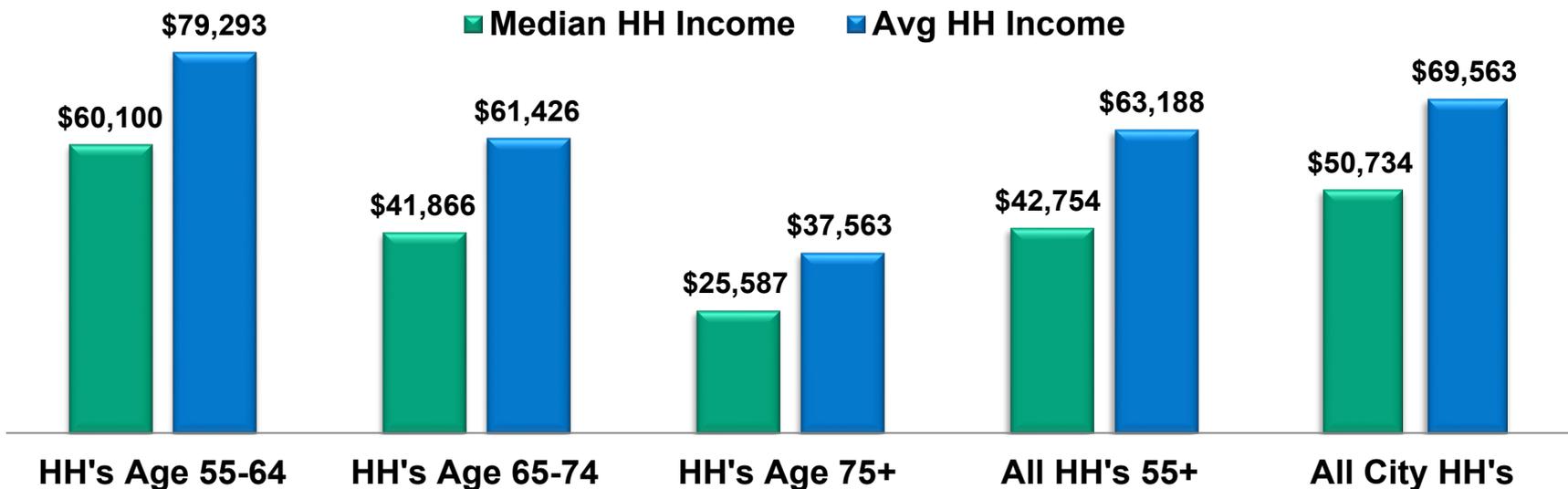


Source: U.S. Census Bureau (2010); ESRI (2013)

# Senior Population Profile

- Approximately 26% of City population is age 55+ in 2012, and approximately 45% of households include a household member age 55+
- Median household income for householders age 55+ is \$42,754, compared to \$50,734 for all City households

## City of Yucaipa – Household Income by Householder Age Bracket



### Percent of 2012 Households:



Source: U.S. Census Bureau (2010); ESRI (2013)

# Trends in Age and Household Size

	1990	2000	2010	2012*	2017*
<b>Average Household Size</b>	2.45	2.67	2.79	2.77	2.81
<b>Median Age</b>	38.5	36.8	37.7	38.1	38.5
<b>Population 55+</b>	32%	24%	25%	26%	29%

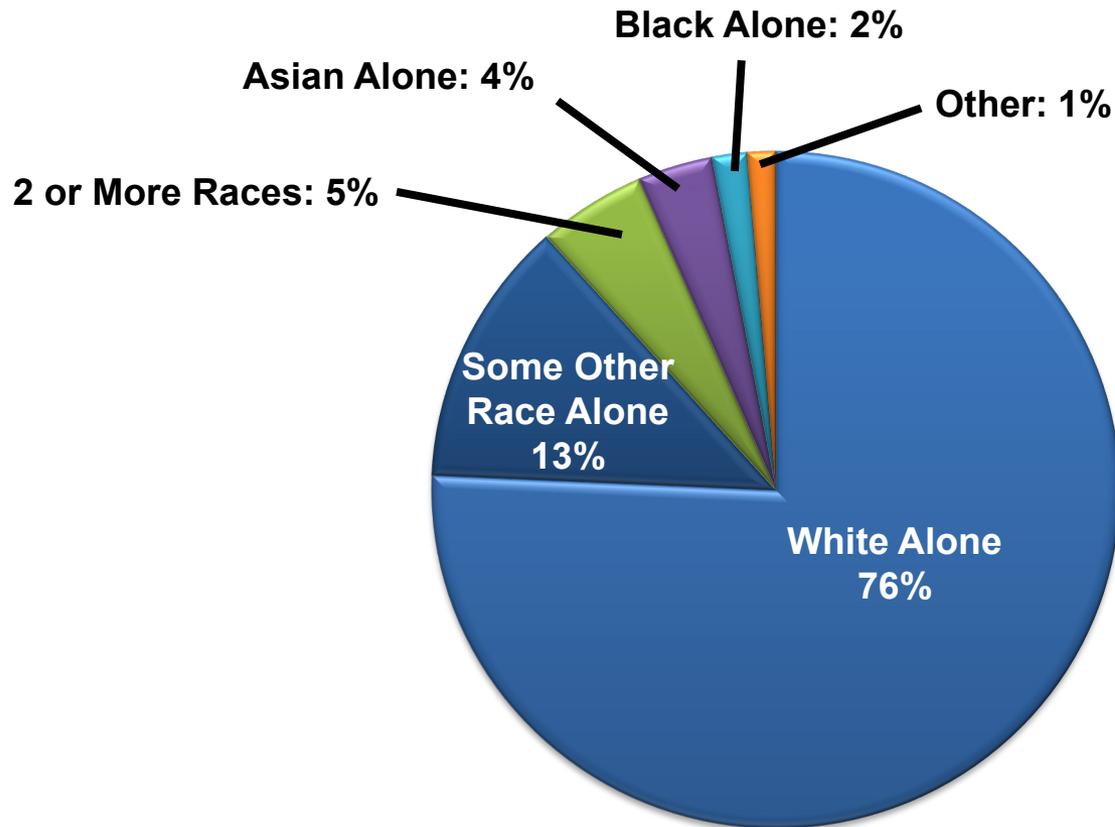
- Average household size increasing and expected to continue increasing
- Median age and percentage of population over the age of 55 decreased in the past and expected to increase slightly over the next 5 years

\* As estimated / projected by ESRI

Source: U.S. Census Bureau (1990-2010); ESRI (2013)

# Race & Ethnicity

## City Population by Race & Ethnicity in 2012



*Hispanic Origin of Any Race: 33%*

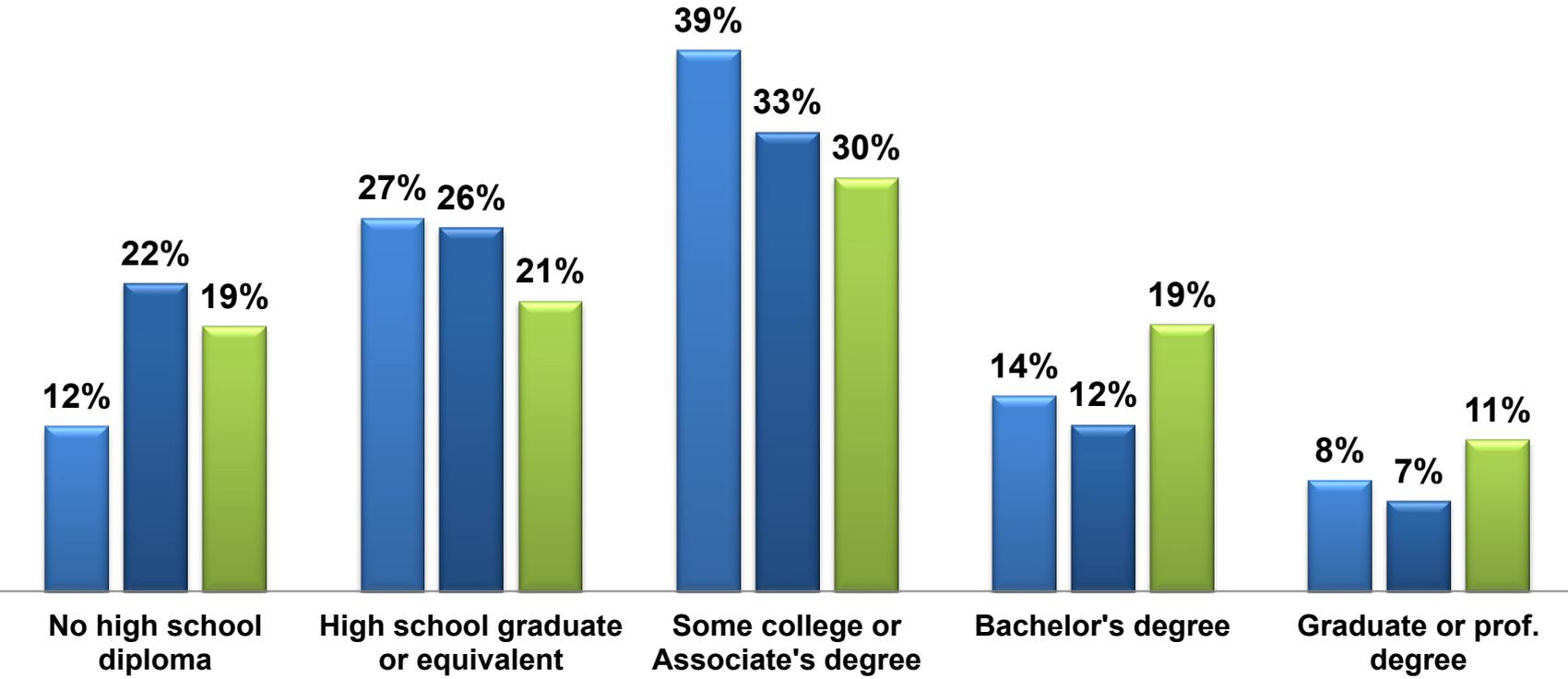
**Note:** U.S. Census Bureau defines race and ethnicity as two separate and distinct identities. One Census question asks respondents which socio-political race (of categories in pie chart above) they associate most closely with, and a separate question asks whether they associate with “Hispanic, Latino, or Spanish origin” or not (defined as ethnicity).

**Source:** U.S. Census Bureau (2010); ESRI (2013)

# Educational Attainment

City Population Aged 25+ by Educational Attainment

■ Yucaipa    ■ S.B. County    ■ California



Source: U.S. Census Bureau American Community Survey (2009-2011)

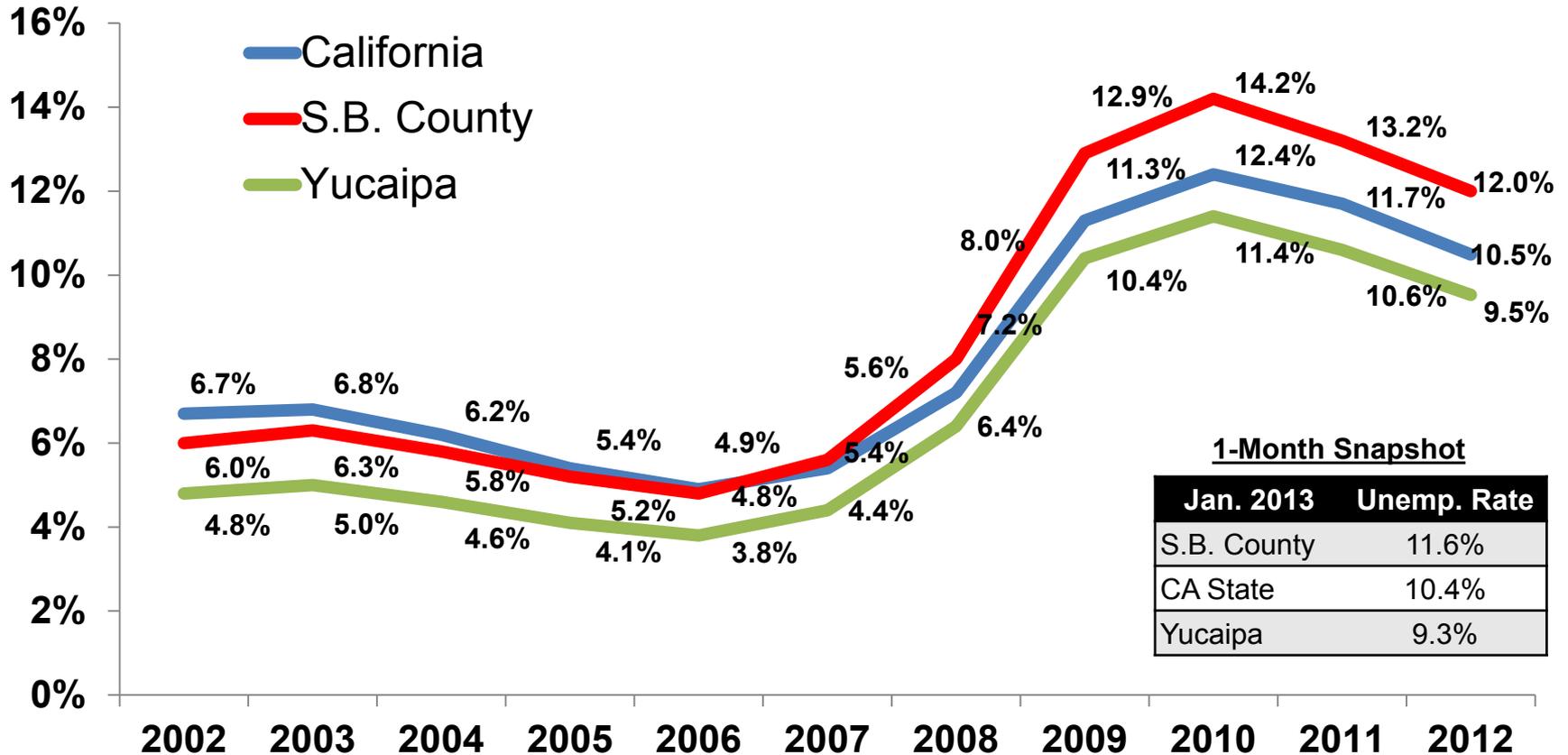


# Population Segmentation Profile

Top 5 “Tapestries” in City	Percent	Sample Characteristics
<b>1. Crossroads</b>	23%	<ul style="list-style-type: none"> <li>• Younger homeowners, many mobile homes</li> <li>• Keep budgets, shop at Wal-Mart &amp; Kmart</li> <li>• Saving for retirement not prioritized</li> </ul>
<b>2. Main Street, USA</b>	15%	<ul style="list-style-type: none"> <li>• Family-oriented and frugal, less diverse</li> <li>• Enjoy parks &amp; open space</li> <li>• Utilize internet at schools &amp; libraries if not home</li> </ul>
<b>3. Exurbanites</b>	14%	<ul style="list-style-type: none"> <li>• Mostly white and older, educated professionals</li> <li>• Focused on savings and financial security</li> <li>• Physically active &amp; enjoy sporting events</li> </ul>
<b>4. Industrious Urban Fringe</b>	8%	<ul style="list-style-type: none"> <li>• Many young Hispanics</li> <li>• Balance budgets, shop at Wal-Mart</li> <li>• Dine out less often</li> </ul>
<b>5. Midland Crowd</b>	6%	<ul style="list-style-type: none"> <li>• Married couples, not ethnically diverse</li> <li>• Educated, politically active, conservative</li> <li>• Do-it-yourselfers, shop local or online</li> </ul>

Source: U.S. Bureau of Labor Statistics (2011); ESRI (2013)

# Unemployment

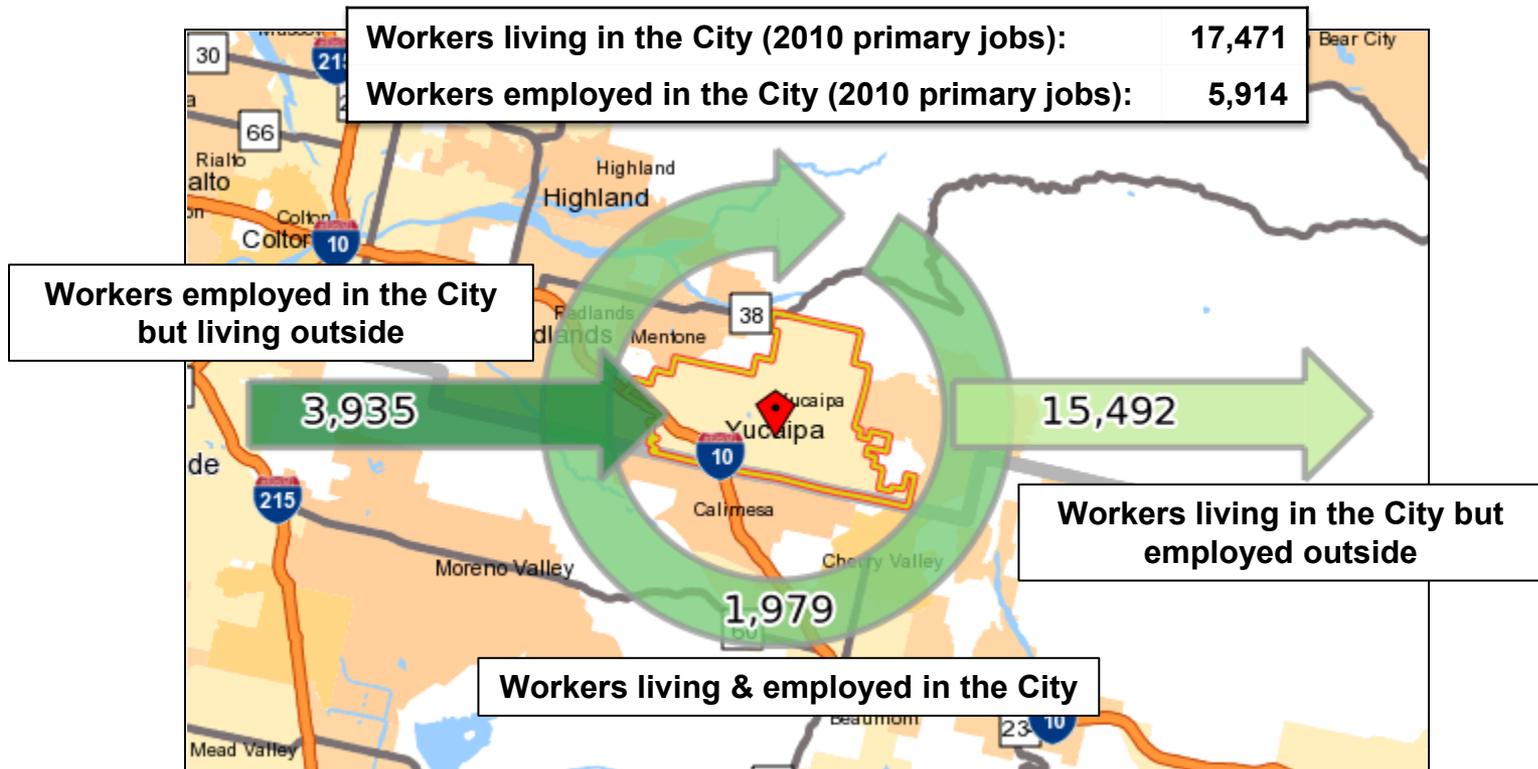


**Note:** Annual average unemployment rate; not seasonally adjusted

**Source:** California Employment Development Department (January 2013)

# Worker Inflow / Outflow

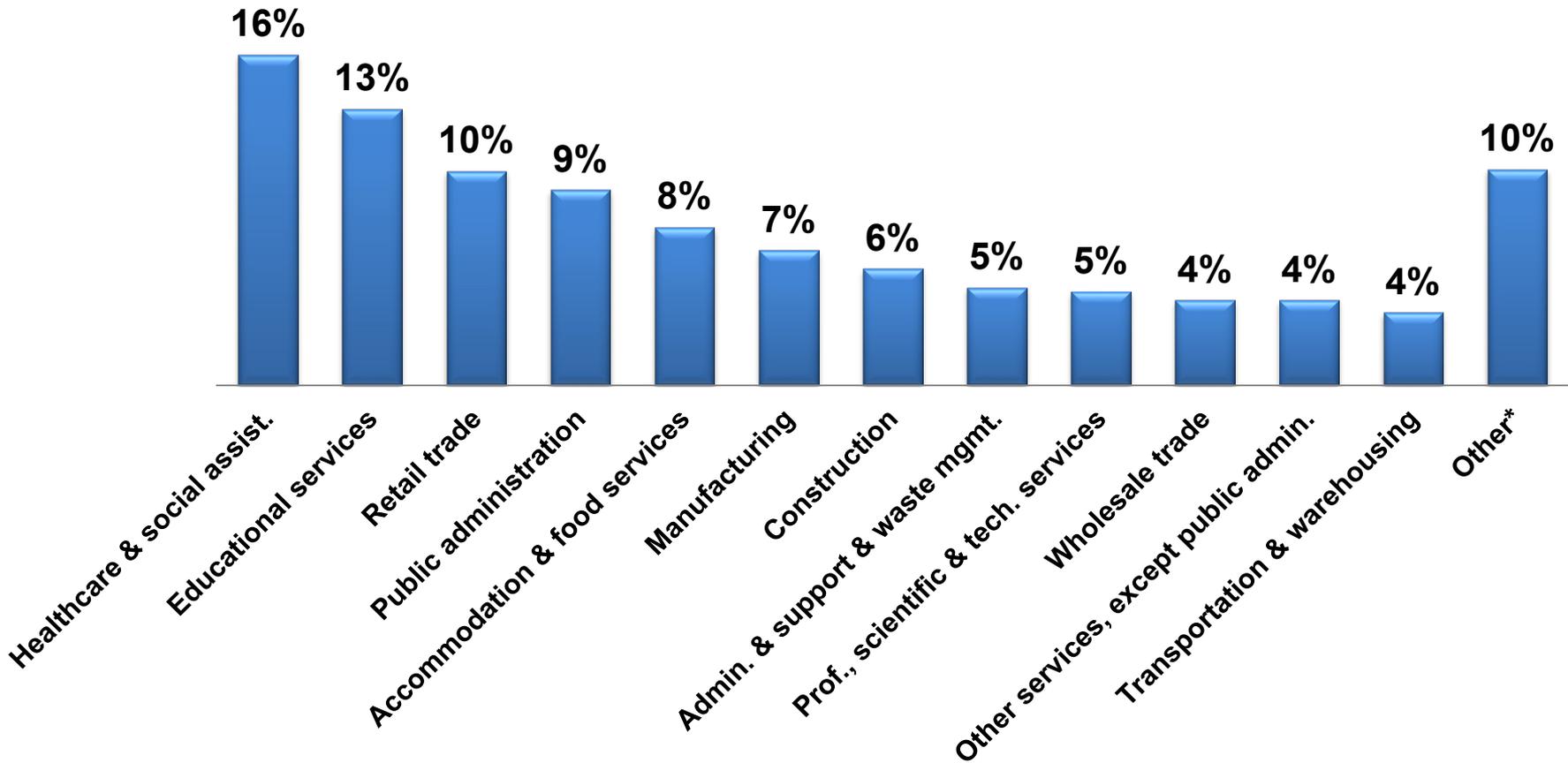
***“Are jobs coming or going?”***



Source: U.S. Census Bureau Center for Economic Studies (2010)

# Resident Employment by Industry

**City of Yucaipa – Civilian Employed Population Age 16+ by Industry**

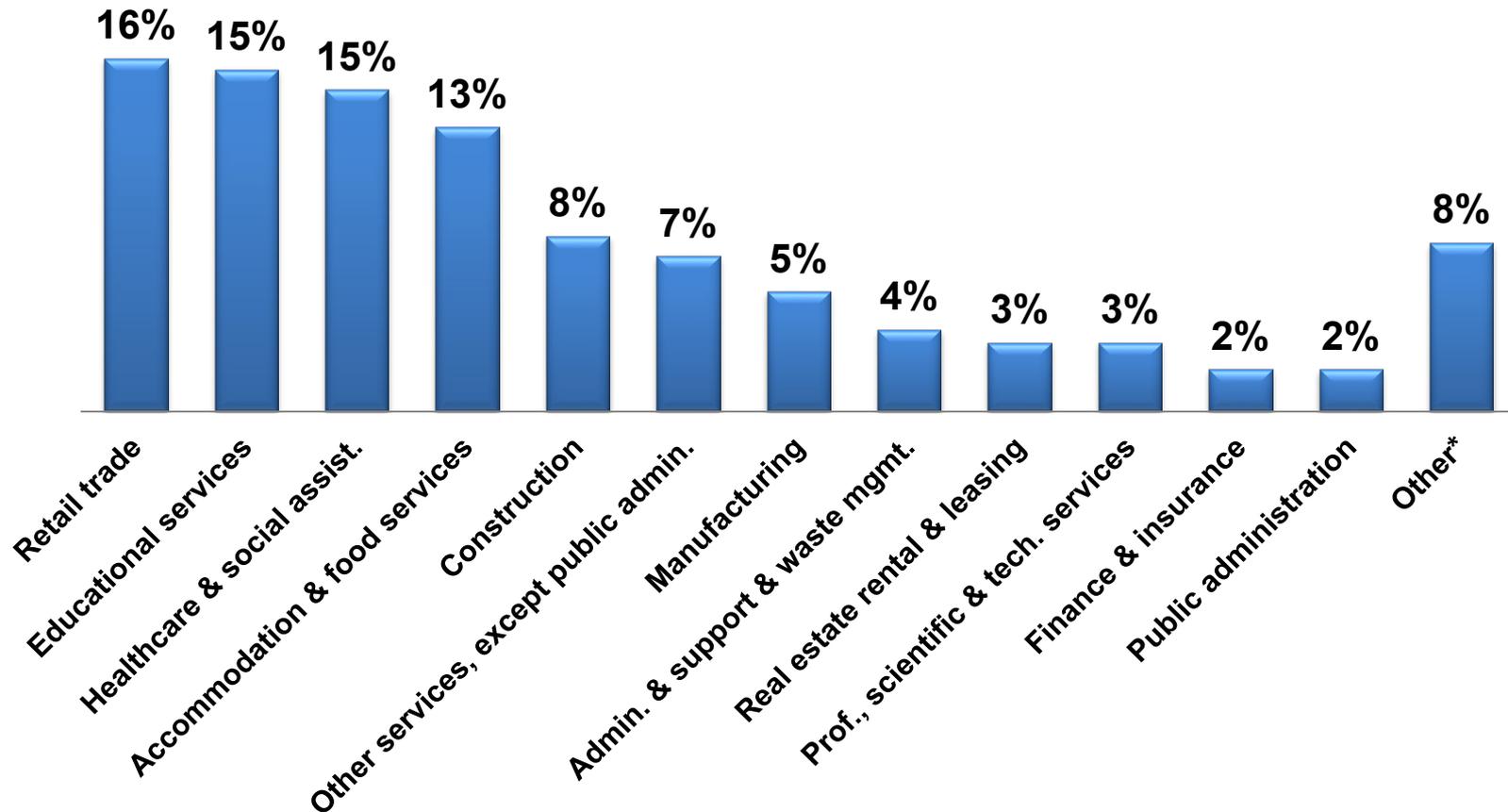


\* "Other" includes finance & insurance; arts, entertainment & recreation; real estate rental & leasing; management of companies & enterprises; information; agriculture, forestry, fishing & hunting; utilities; mining, quarrying, oil & gas extraction

Source: U.S. Census Bureau Center for Economic Studies (2010)

# Worker Employment by Industry (Jobs Available in Yucaipa)

## Workers in Yucaipa by Industry (Regardless of Residence)

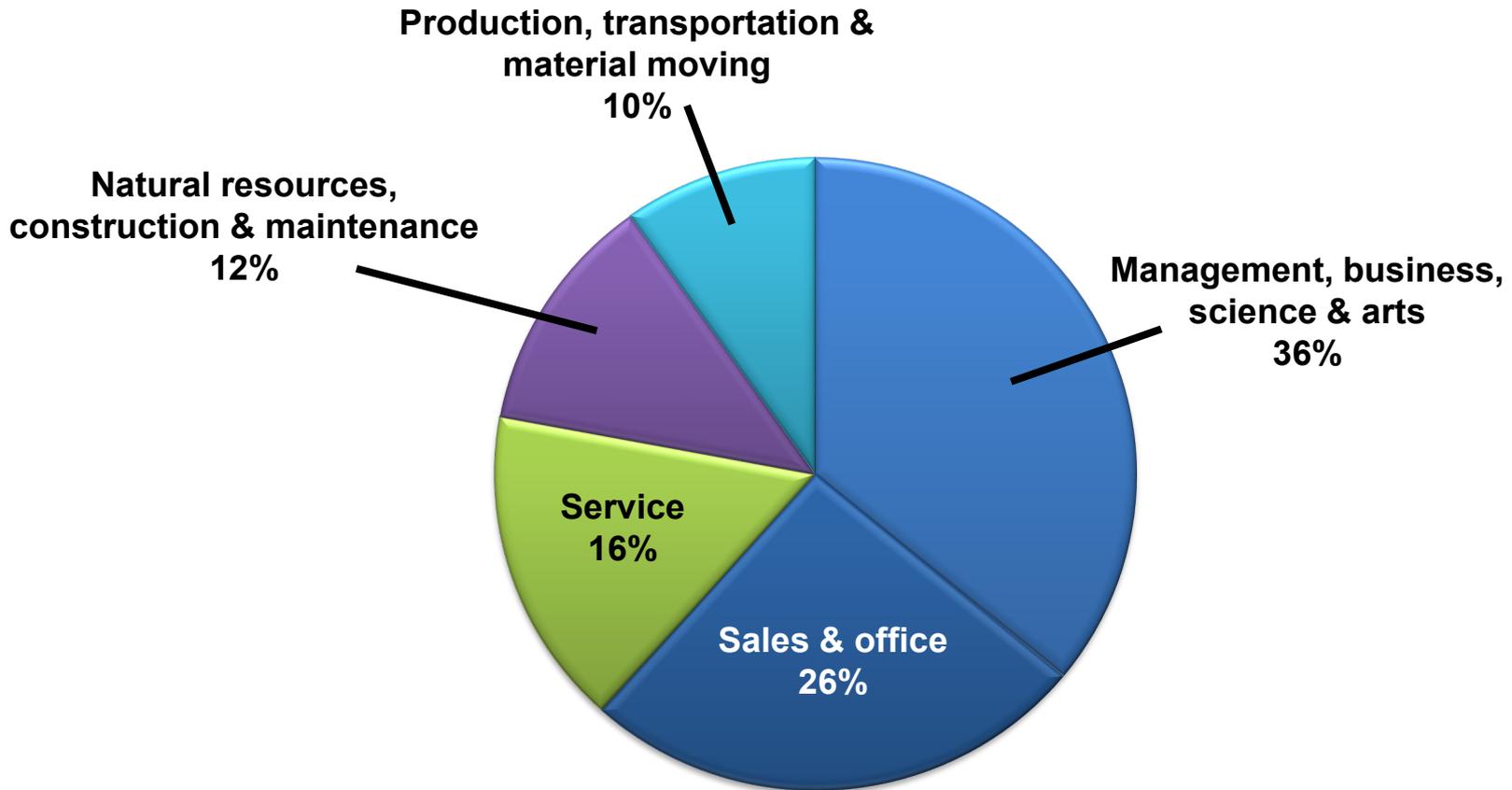


\* "Other" includes wholesale trade; utilities; arts, entertainment & recreation; transportation & warehousing; information; agriculture, forestry, fishing & hunting; mining, quarrying, oil & gas extraction; management of companies & enterprises

Source: U.S. Census Bureau Center for Economic Studies (2010)

# Resident Employment by Occupation

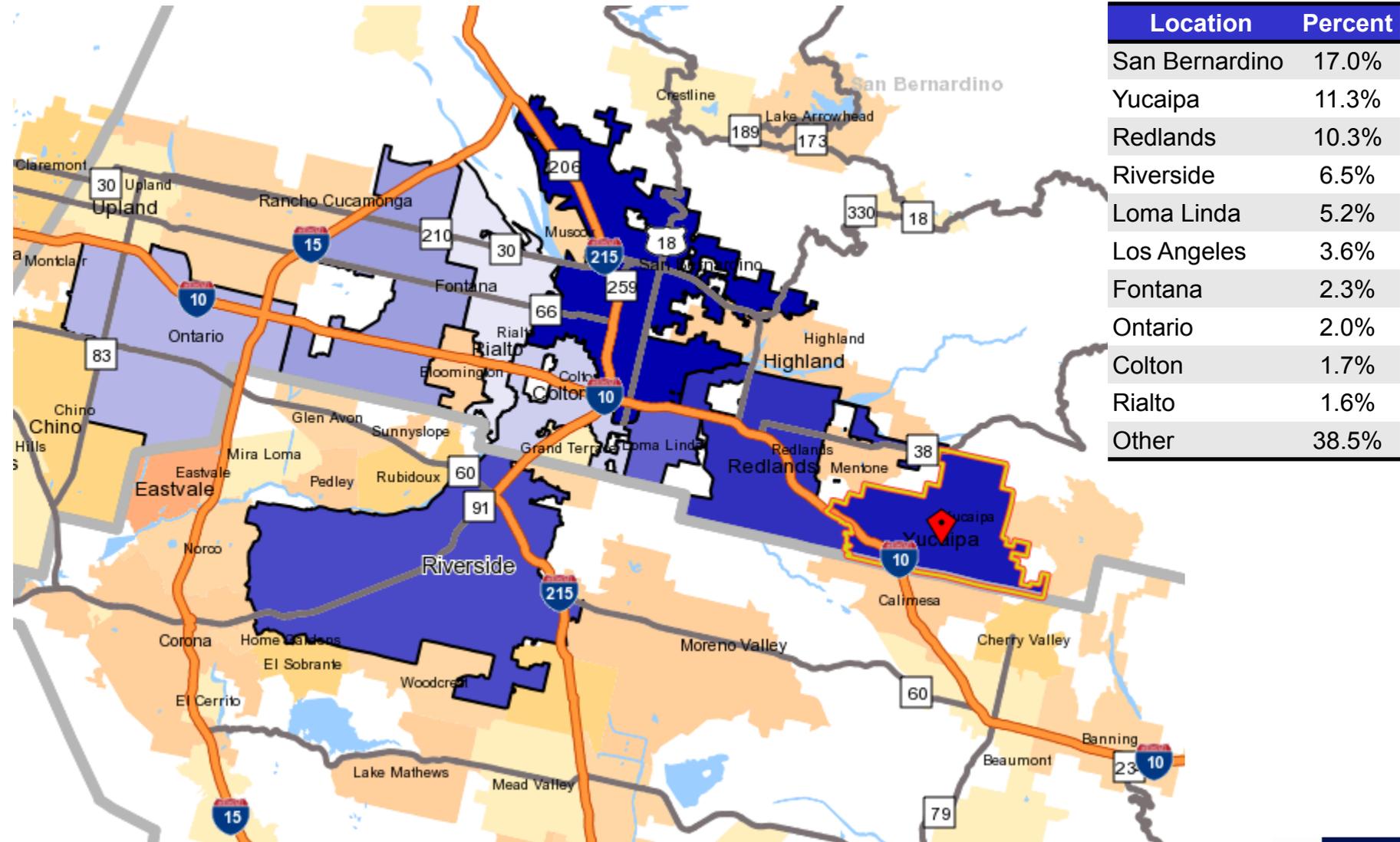
## City of Yucaipa – Civilian Employed Population Age 16+ by Occupation



Source: U.S. Census Bureau American Community Survey (2009-2011)

# Resident Workplace Location

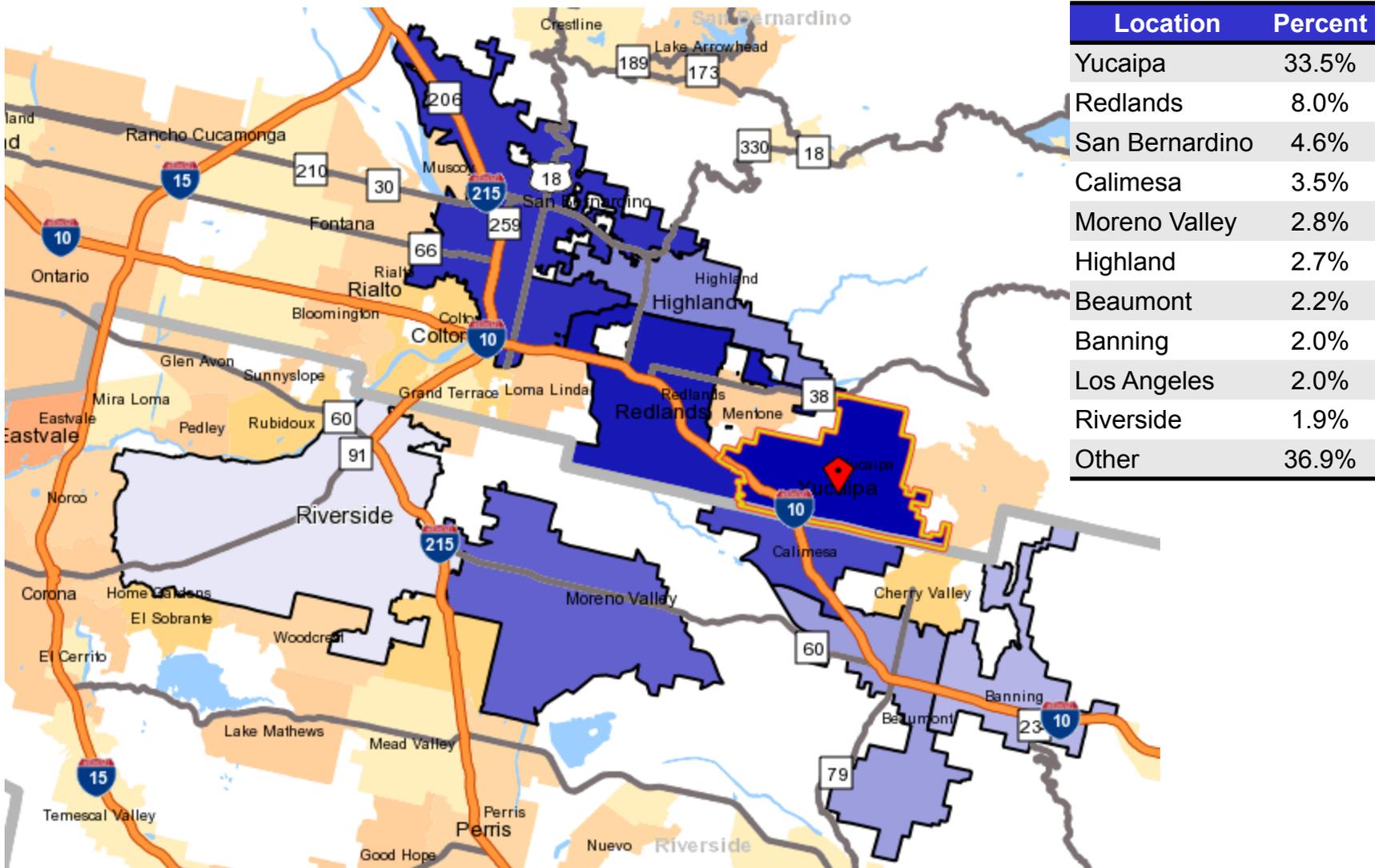
## *“Where Yucaipa Residents Work”*



Source: U.S. Census Bureau Center for Economic Studies (2010)

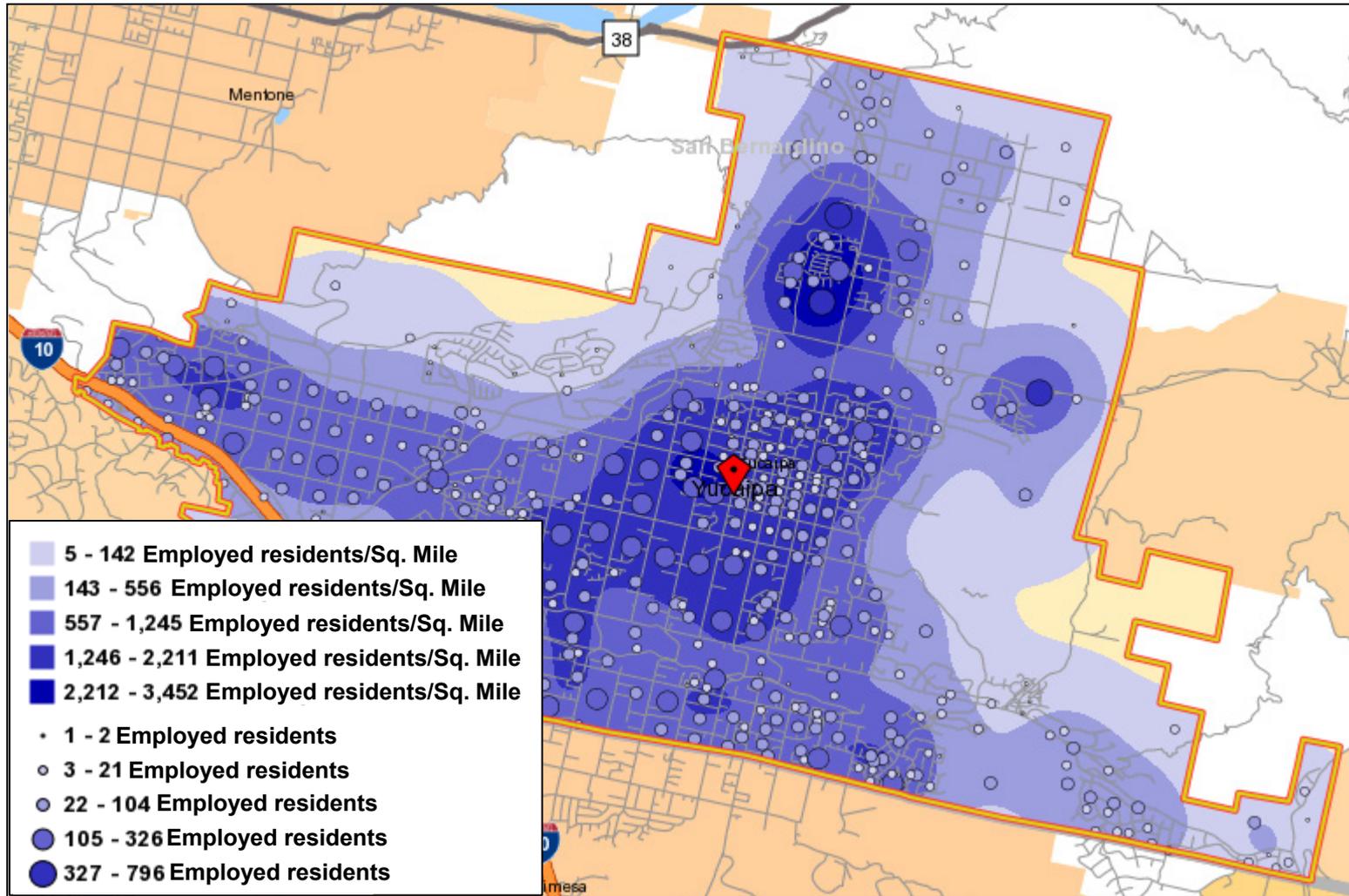
# Worker Residence

## *“Where People Who Work in Yucaipa Come From”*



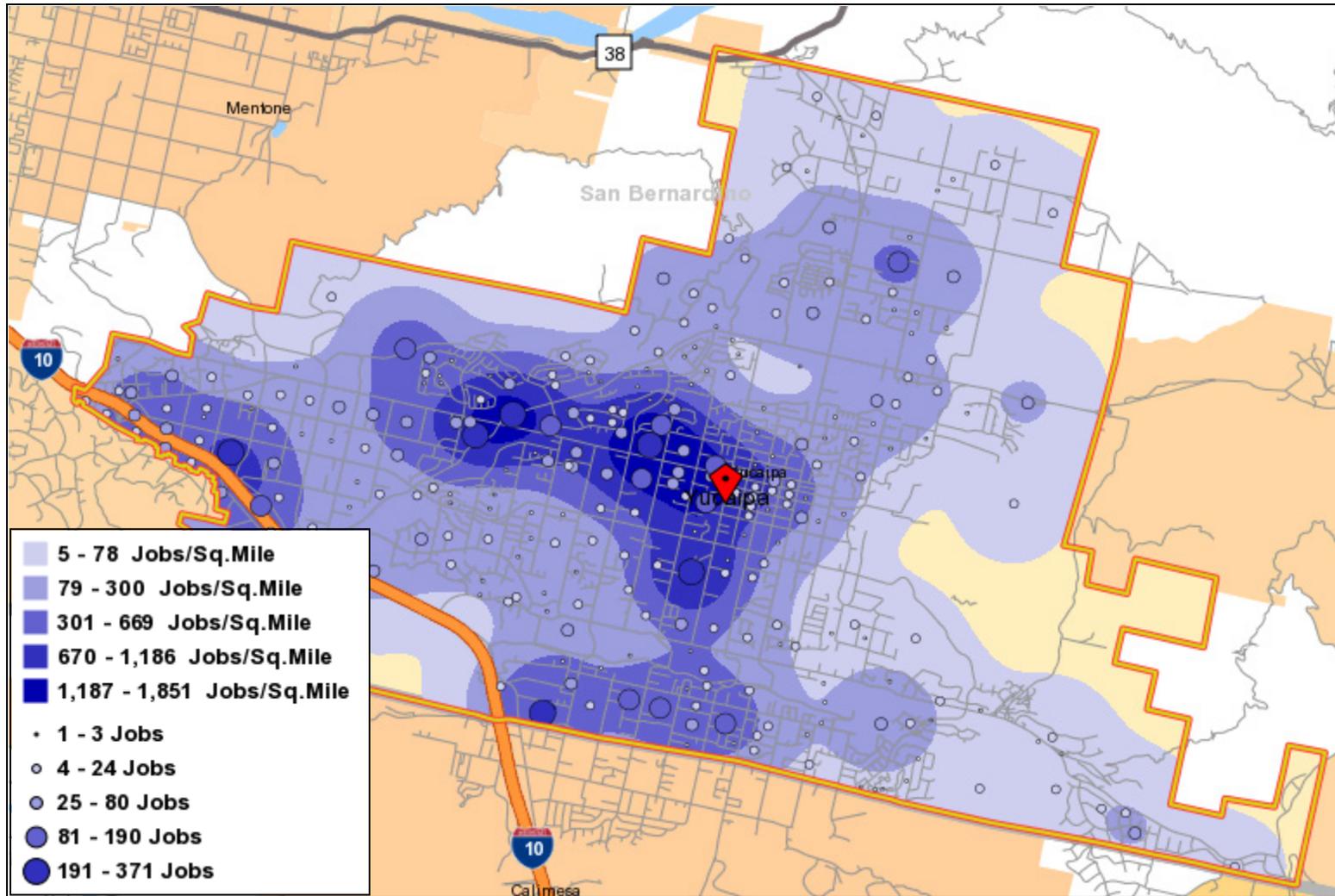
Source: U.S. Census Bureau Center for Economic Studies (2010)

# Residence Concentration Within Yucaipa



Source: U.S. Census Bureau Center for Economic Studies (2010)

# Employment Concentration Within Yucaipa



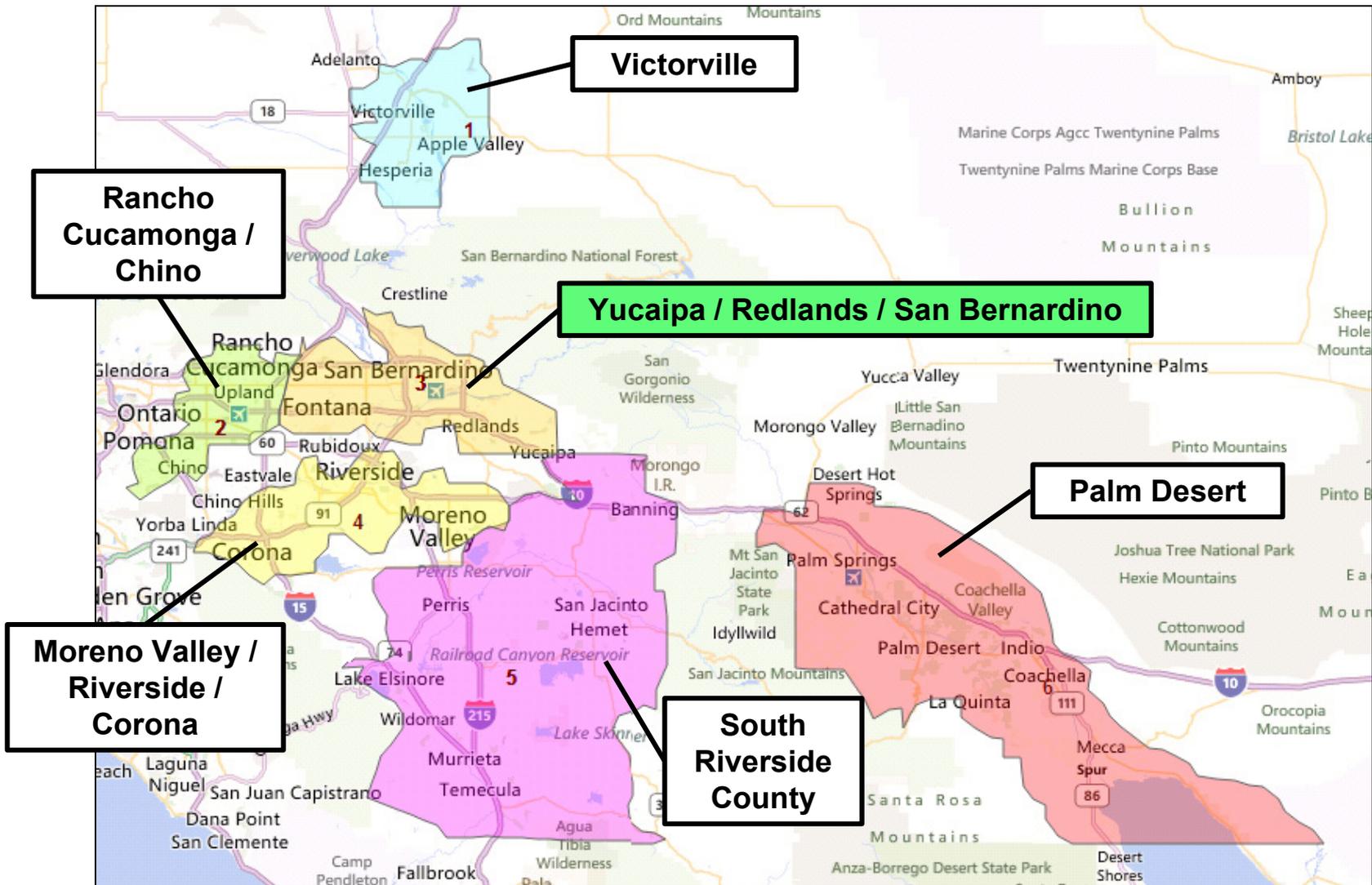
Source: U.S. Census Bureau Center for Economic Studies (2010)

# Summary: Demographic and Employment

- Strong average household incomes.
- Younger family-oriented and budget conscious demographic profile. Population is physically active and enjoys outdoors.
- Majority of residents are comprised of white race with high school and some college education level.
- Low unemployment compared to County and State. Yucaipa is a net exporter of jobs primarily to San Bernardino and Redlands.
- Most people in Yucaipa work in retail trade, educational services, health and social assistance and accommodation and food services.

# Retail Vacancy & Lease Rates

# Submarket Definitions



# Retail Vacancy Rates

- Yucaipa Submarket vacancy rates below Inland Empire average

Market / Submarket	Vacancy Rate	Year-Over-Year Basis Point Change
Moreno Valley / Riverside / Corona	8.4%	20
Victorville	9.6%	60
<b>Yucaipa / Redlands / San Bernardino</b>	<b>10.2%</b>	<b>-100</b>
South Riverside County	10.6%	-80
Rancho Cucamonga / Chino	11.1%	-120
Palm Desert	18.5%	70
<b>Inland Empire Total</b>	<b>11.3%</b>	<b>-40</b>
<b>Los Angeles County Total</b>	<b>6.6%</b>	<b>20</b>
<b>Orange County Total</b>	<b>7.2%</b>	<b>70</b>

# Retail Lease Rates

- Yucaipa Submarket lease rates below Inland Empire average

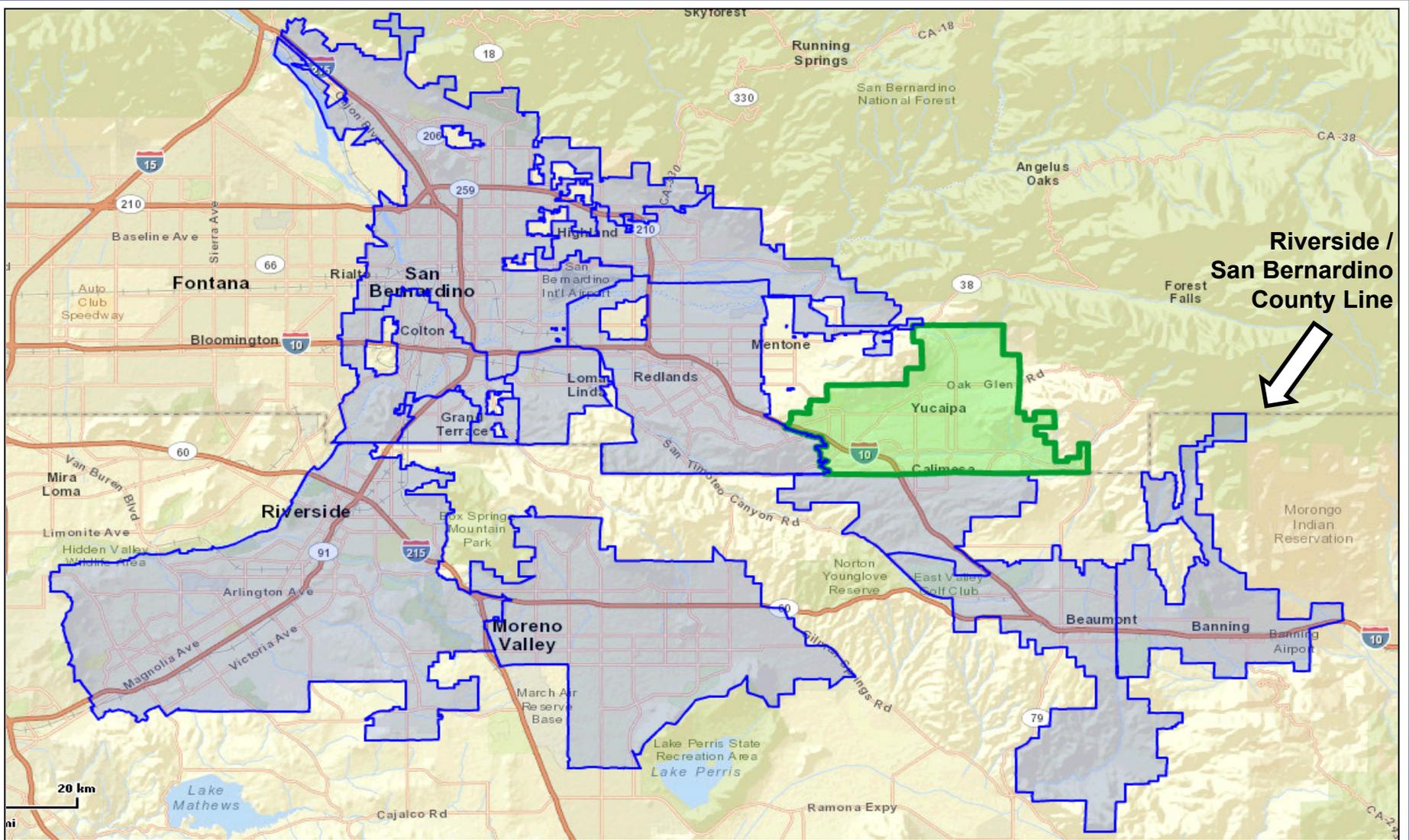
Market / Submarket	Effective Rents (\$ PSF / Month)	Year-Over-Year Change
Victorville	\$1.13	-1.7%
<b>Yucaipa / Redlands / San Bernardino</b>	<b>\$1.19</b>	<b>-1.0%</b>
Moreno Valley / Riverside / Corona	\$1.46	-1.8%
South Riverside County	\$1.48	-0.9%
Rancho Cucamonga / Chino	\$1.49	-1.2%
Palm Desert	\$1.78	-0.9%
<b>Inland Empire Total</b>	<b>\$1.44</b>	<b>-1.2%</b>
<b>Los Angeles County Total</b>	<b>\$2.04</b>	<b>1.0%</b>
<b>Orange County Total</b>	<b>\$2.14</b>	<b>0.8%</b>

# Retail Sales Surplus / Leakage

# Retail Sales Surplus / Leakage

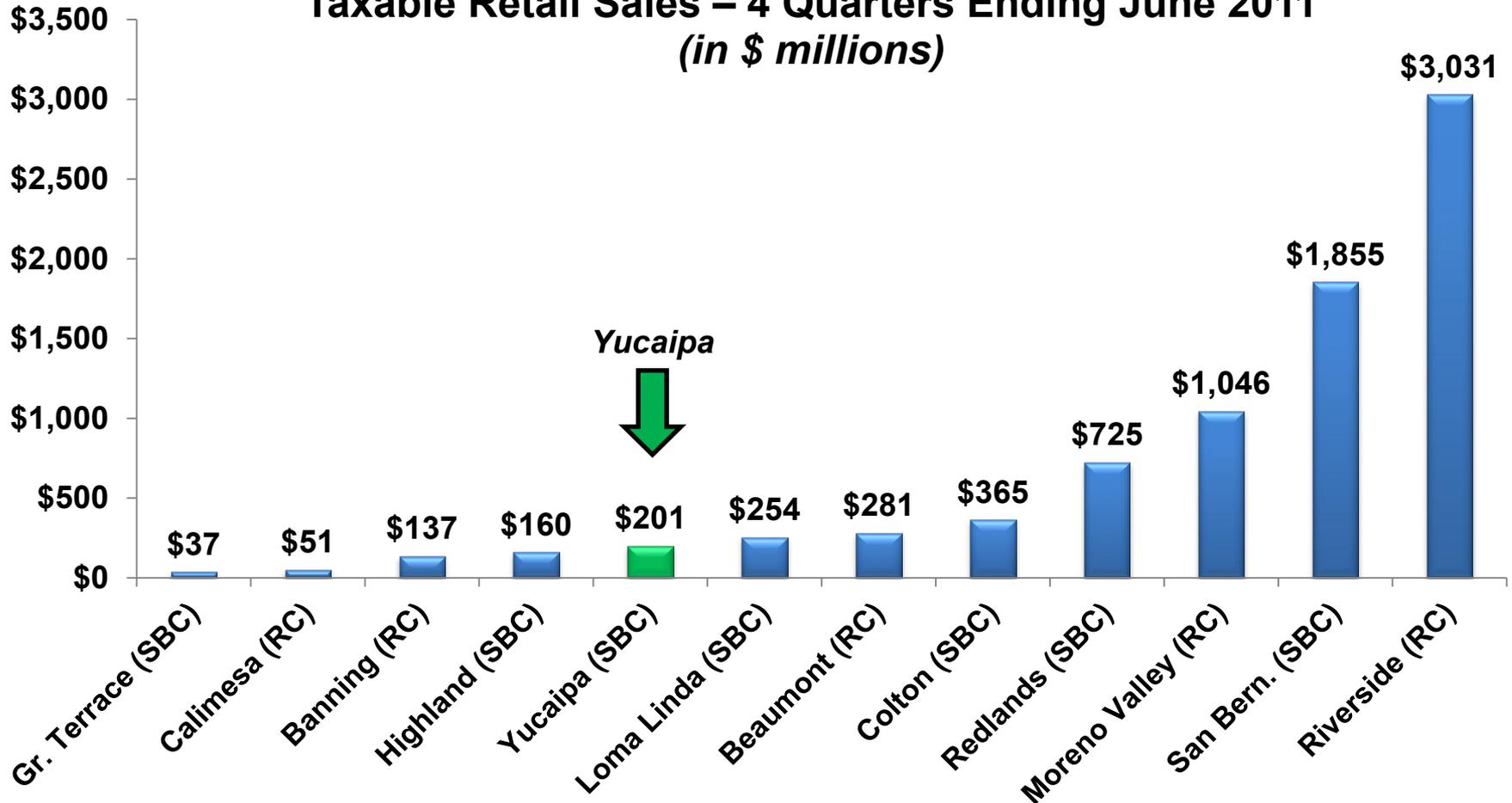
- Taxable consumer spending across retail categories is totaled and normalized for population within the City and comparison regions for the purpose of evaluating potential sales leakage / capture across political boundaries
- Taxable retail sales per capita for the City (**\$3,944**) is relatively low when compared to neighboring cities and benchmark regions
- Retail sales in the City are lower than retail spending potential based on households and average household income, suggesting that Yucaipa residents may be making retail purchases outside the City, and that the City is not likely capturing retail spending by residents of other cities (i.e. sales leakage)

# Yucaipa & Comparison Cities



# Taxable Retail Sales Comparison Yucaipa & Comparison Regions

**Taxable Retail Sales – 4 Quarters Ending June 2011**  
(in \$ millions)



2010 Population (000s):

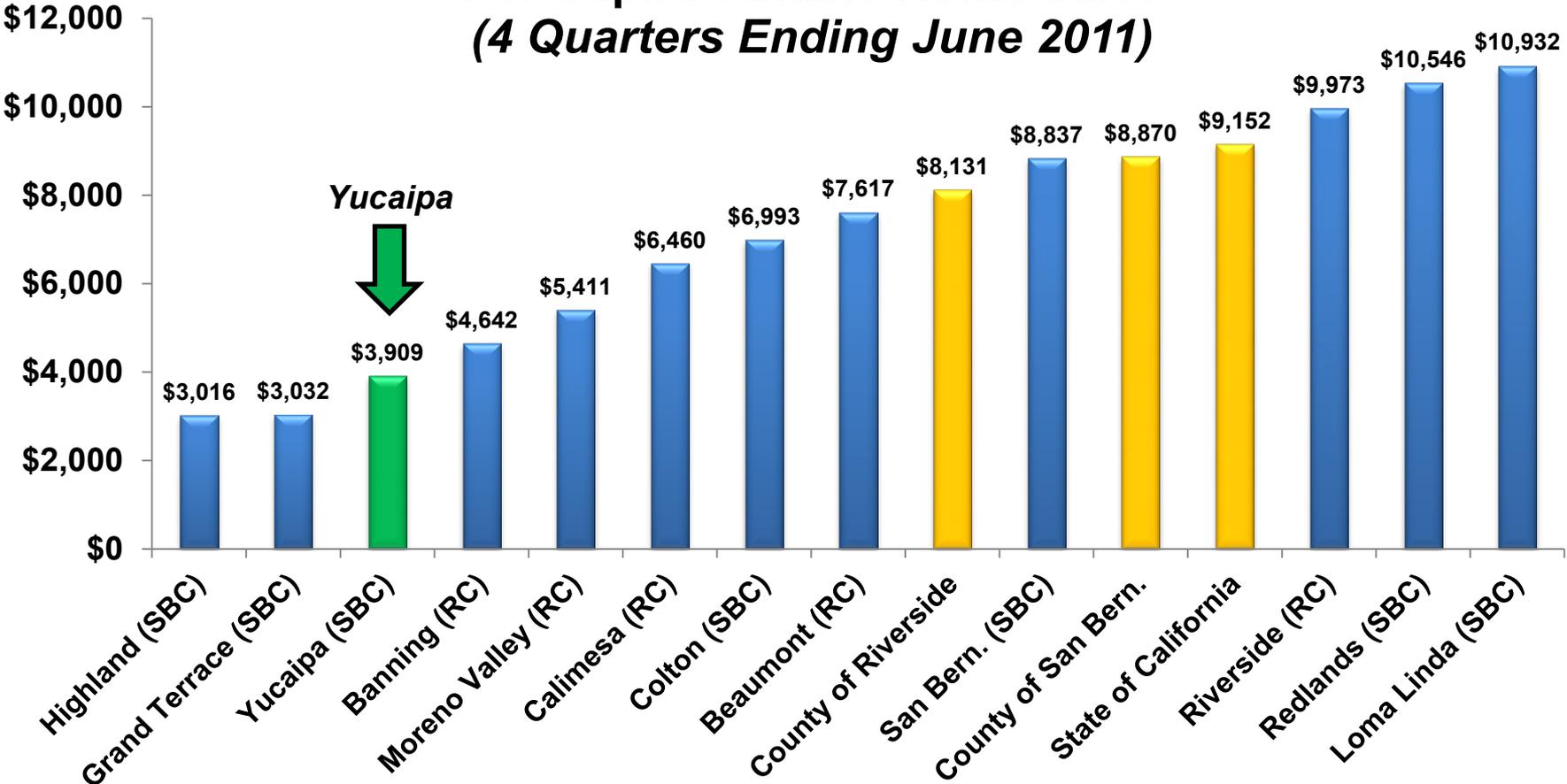
12	8	30	53	51	23	37	52	69	193	210	304
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SBC = San Bernardino County ; RC = Riverside County

Source: California State Board of Equalization; US Census (2013)

# Per Capita Taxable Retail Sales Yucaipa & Comparison Regions

## Per Capita Taxable Retail Sales (4 Quarters Ending June 2011)



2010 Population (000s):

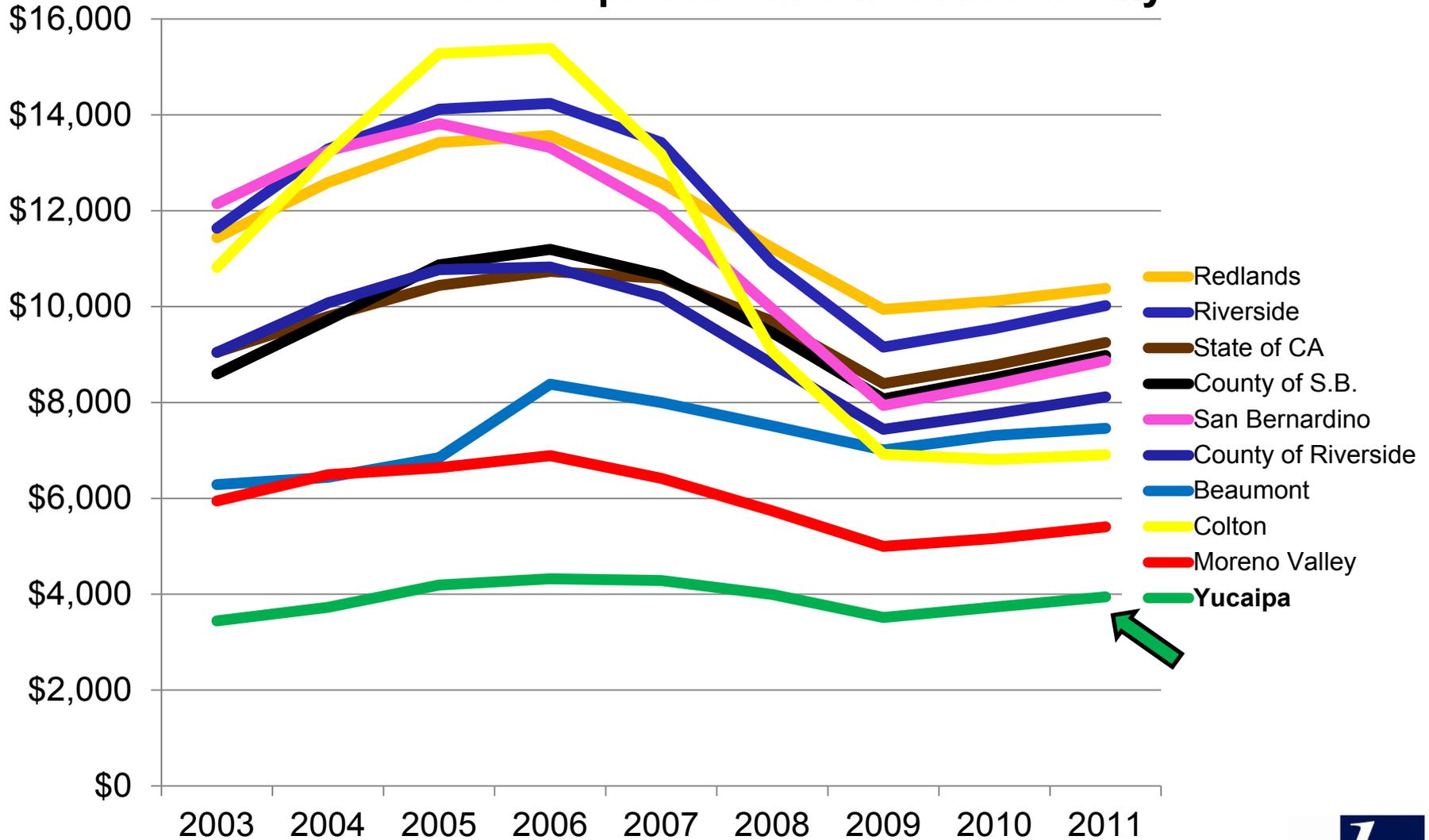
53	12	51	30	193	8	52	37	2.2M	210	2.0M	37.3M	304	69	23
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SBC = San Bernardino County ; RC = Riverside County

Source: California State Board of Equalization; US Census (2013)

# Historical Per Capita Retail Sales *Yucaipa & Comparison Regions*

## Per Capita Retail Sales Historically



Source: California Retail Survey (2012)

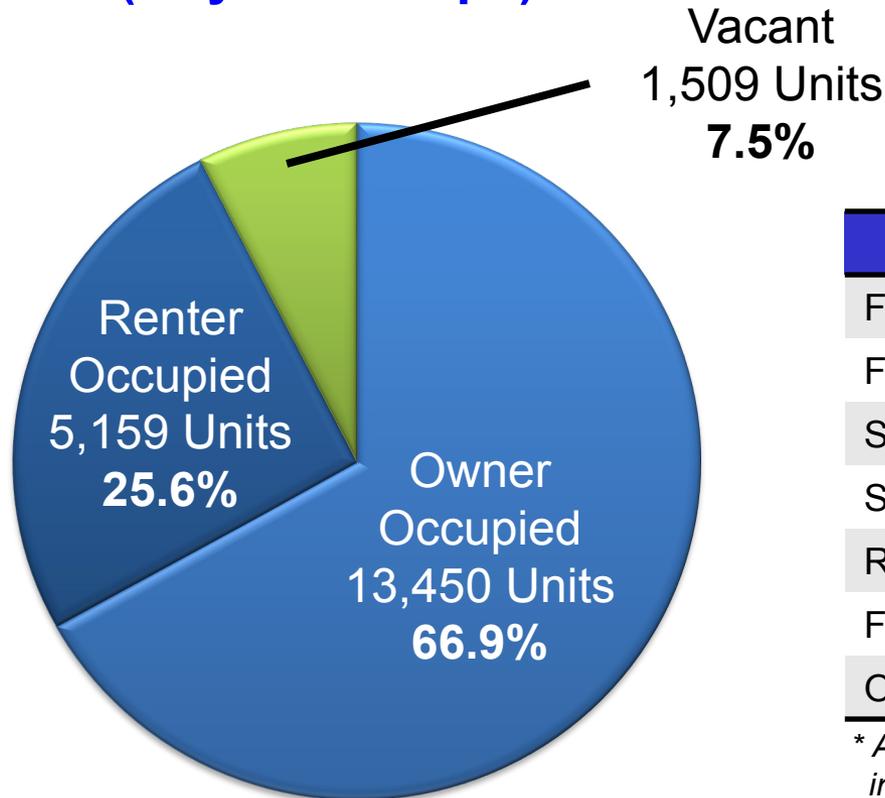
# Existing Housing Conditions

# Housing Overview

- **Homeownership:** 67% owners vs. 26% renters (7.5% vacant)
- **# Units:** Mostly single family (71%)
  - Distinctly large percentage of mobile homes (22%)
- **Age of housing:** Relatively newer stock (63% built since 1970)
- **Home Values & Rents:**
  - Average home value ~\$218,000
  - Average gross monthly rent ~\$1,600

# Housing Unit Breakdown

## 2012 Housing Unit Breakdown (City of Yucaipa)



### Breakdown of Vacant Housing Units

For Rent	33%
For Sale Only*	30%
Seasonal/Recreational/Occasional Use	7%
Sold – Not Occupied	6%
Rented – Not Occupied	2%
For Migrant Workers	<1%
Other	23%

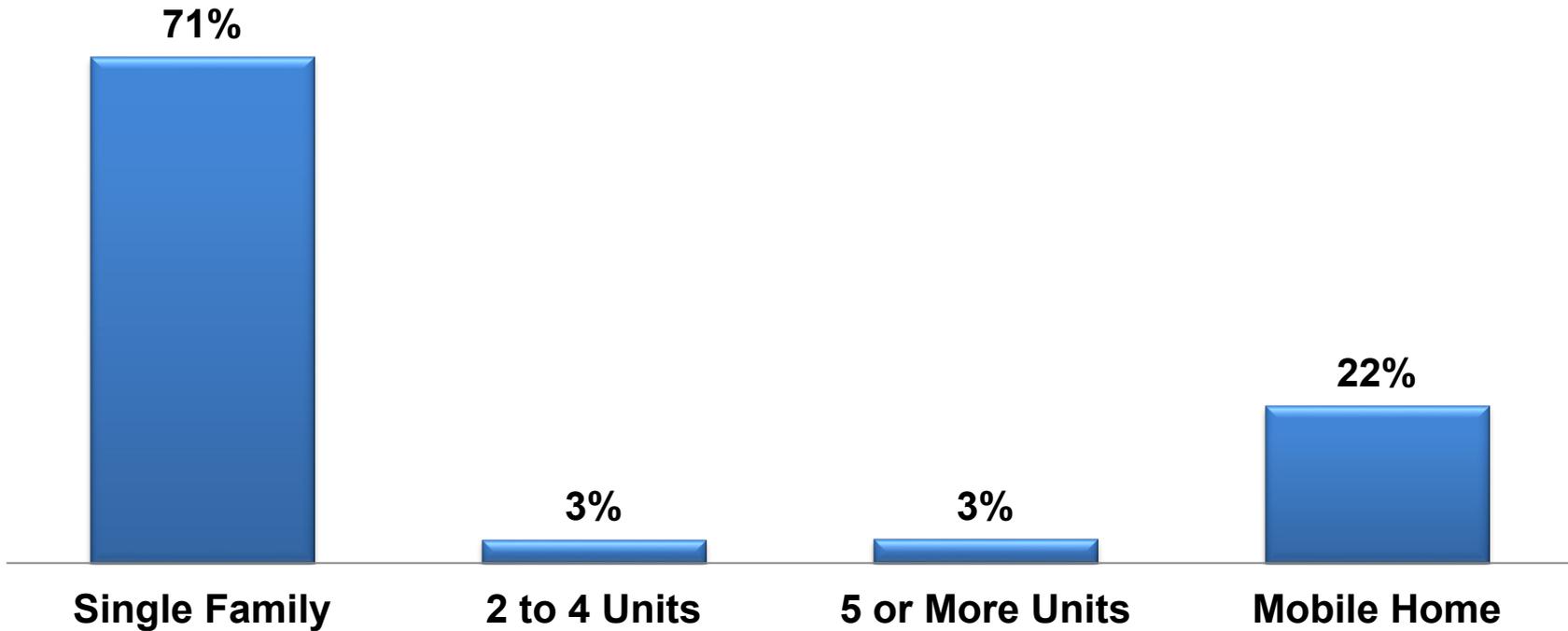
\* Anecdotal evidence suggests recent decreasing trend in for-sale inventory in late 2012 / early 2013

**Total Housing Units (2012): 20,118**

**Source:** U.S. Census Bureau (2010); ESRI (2013)

# # Housing Units in Structure

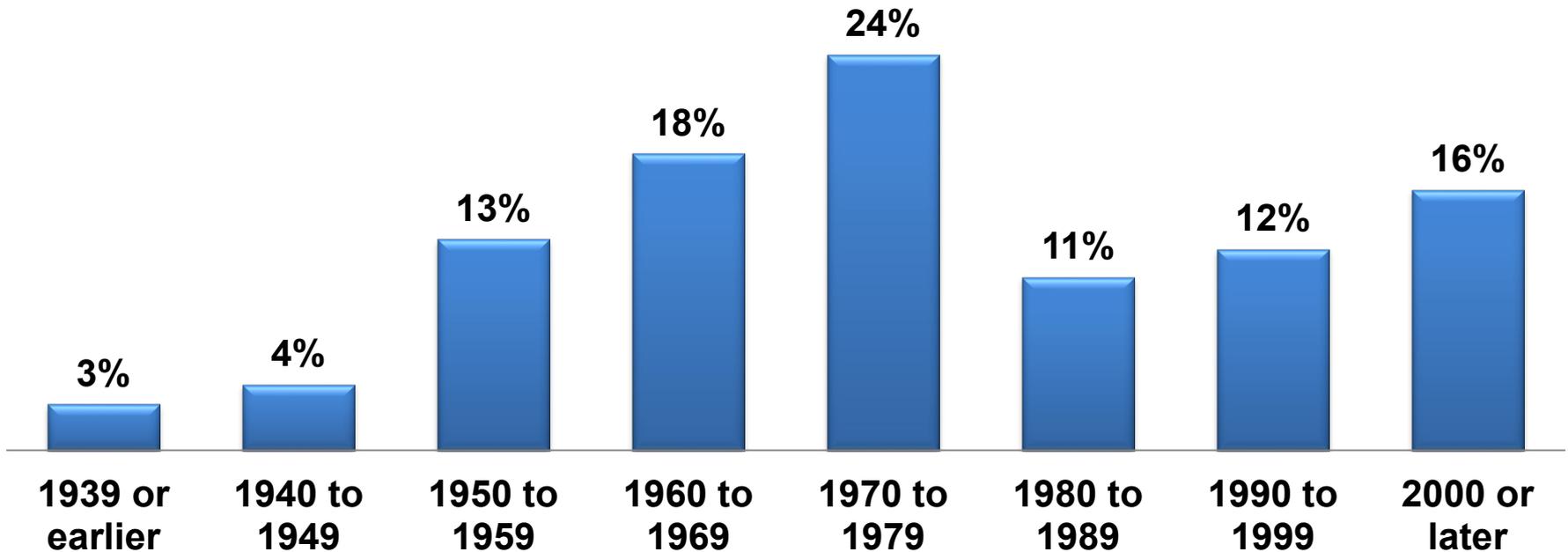
## # Housing Units in Structures in Yucaipa



Source: U.S. Census Bureau American Community Survey (2009-2011)

# Age of Housing

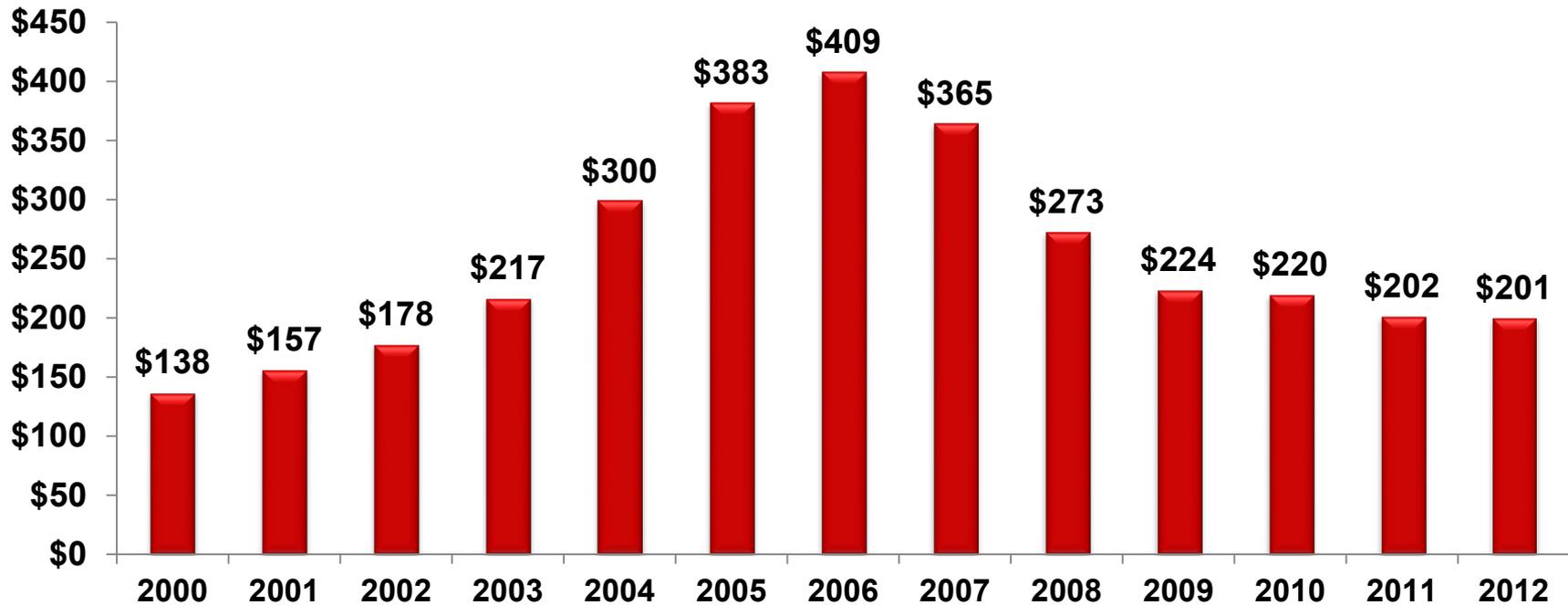
Housing Units by Year Built in Yucaipa



Source: U.S. Census Bureau American Community Survey (2009-2011)

# Home Value History

Zillow Home Value Index (in \$ thousands)



Source: Zillow.com

# Current Home Value & Rent Comparison

Home Value Index	Feb 2013
Redlands	\$266,800
Loma Linda	\$263,600
Riverside County	\$220,400
<b>Yucaipa</b>	<b>\$218,000</b>
Grand Terrace	\$217,900
Riverside	\$216,200
Highland	\$192,800
Calimesa	\$187,900
Beaumont	\$186,900
S.B. County	\$186,800
Moreno Valley	\$168,400
Colton	\$146,100
Banning	\$139,100
San Bernardino	\$136,700

Monthly Rent Index	Feb 2013
Loma Linda	\$1,767
Redlands	\$1,712
Riverside County	\$1,686
<b>Yucaipa</b>	<b>\$1,621</b>
Grand Terrace	\$1,612
Riverside	\$1,609
Beaumont	\$1,571
Highland	\$1,547
Calimesa	\$1,487
Moreno Valley	\$1,473
S.B. County	\$1,429
Colton	\$1,320
Banning	\$1,275
San Bernardino	\$1,245

Source: Zillow.com

## Strategy

- Retail in Uptown
- Trade Area Retailer Voids
- *Summary: Retail*
- Potential for Mixed-Use Residential
- *Summary: Housing and Mixed-Use*
- Uptown Opportunity Site Assessment

# Retail in Uptown

# Retail Categories Applicable to Uptown

## More Appropriate for Uptown

- Apparel Stores (GAFO)
- Home Furnishings & Appliance (GAFO)
- Other Retail Stores (GAFO)
- Grocery Stores (Convenience)
- Restaurants & Bars (Convenience)

## Less Appropriate for Uptown

- General Merchandise (GAFO)
- Building Materials (Commercial)
- Auto Dealers & Supplies (Commercial)
- Service Stations (Commercial)

- Specialty shop apparel stores, restaurants, and other smaller format retailers/categories, primarily locally and regionally based, will be more applicable fits for Uptown
- General merchandise stores, wholesalers, and other larger format retailers/categories, nationally based, will be less applicable for Uptown's small-town theme

# Retail Category Definitions

- **Shopper Goods / GAFO** (General Merchandise, Apparel & Accessories, Furniture & Other Sales)
  - Apparel Stores
  - General Merchandise
  - Home Furnishings & Appliances
  - Other Retail Stores
- **Convenience Goods**
  - Grocery Stores
  - Restaurants & Bars
- **Heavy Commercial Goods**
  - Building Materials
  - Auto Dealers & Supplies
  - Service Stations

*Retail Categories delineated by California Board of Equalization*

# Retail Sales Distribution by Category

## Yucaipa & Comparison Regions

% of Sales (2011)	Yucaipa	Redlands	San Bern. (City)	Colton	Riverside (City)	Moreno Valley	Beaumont	County of San Bern.	County of Riverside	State of California
<b>Categories more relevant to Uptown</b>										
Apparel Stores	N/A	5%	6%	1%	8%	7%	N/A	6%	7%	8%
Home Furn. & App.	1%	2%	5%	10%	5%	2%	9%	5%	5%	7%
Other Retail Stores	16%	10%	9%	27%	10%	6%	42%	14%	10%	13%
Grocery	14%	9%	6%	11%	6%	8%	7%	6%	7%	6%
Restaurants & Bars	18%	15%	14%	13%	13%	15%	11%	13%	14%	16%
<b>Categories less relevant to Uptown</b>										
Gen. Merchandise	3%	11%	22%	N/A	13%	24%	7%	17%	19%	16%
Building Materials	5%	13%	8%	N/A	7%	8%	N/A	6%	7%	7%
Auto Dealers & Supp.	11%	24%	16%	20%	27%	13%	7%	15%	15%	14%
Service Stations	31%	11%	14%	19%	12%	16%	17%	18%	16%	14%
<b>Retail Stores Total</b>	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

Key:  Indicates higher value for Yucaipa

Indicates lower value for Yucaipa

**Note:** Sales data for "Apparel Stores" in Yucaipa omitted by California Board of Equalization to avoid disclosure of confidential information. Sales data for Apparel Stores included in "Other Retail" category.

**Source:** California Retail Survey (2012)

# Per Capita Retail Sales by Category

## Yucaipa & Comparison Regions

Per Capita Sales (2011)	Yucaipa	Redlands	San Bern. (City)	Colton	Riverside (City)	Moreno Valley	Beaumont	County of San Bern.	County of Riverside	State of California
<i>Categories more relevant to Uptown</i>										
Apparel Stores	N/A	\$501	\$504	\$48	\$774	\$392	N/A	\$580	\$588	\$695
Home Furn. & App.	\$47	\$235	\$422	\$664	\$468	\$124	\$636	\$473	\$422	\$627
Other Retail Stores	\$635	\$1,054	\$763	\$1,870	\$960	\$321	\$3,128	\$1,223	\$804	\$1,170
Grocery	\$543	\$891	\$574	\$738	\$631	\$442	\$535	\$518	\$553	\$560
Restaurants & Bars	\$716	\$1,567	\$1,242	\$890	\$1,269	\$819	\$836	\$1,147	\$1,112	\$1,452
<i>Categories less relevant to Uptown</i>										
Gen. Merchandise	\$138	\$1,123	\$1,980	N/A	\$1,344	\$1,304	\$503	\$1,523	\$1,555	\$1,490
Building Materials	\$201	\$1,332	\$697	N/A	\$688	\$429	N/A	\$569	\$538	\$636
Auto Dealers & Supp.	\$452	\$2,510	\$1,402	\$1,395	\$2,695	\$686	\$559	\$1,362	\$1,257	\$1,341
Service Stations	\$1,212	\$1,166	\$1,285	\$1,303	\$1,192	\$888	\$1,265	\$1,587	\$1,289	\$1,280
<b>Retail Stores Total</b>	<b>\$3,944</b>	\$10,379	\$8,870	\$6,909	\$10,021	\$5,405	\$7,461	\$8,982	\$8,117	\$9,252

Key:  Indicates higher value for Yucaipa

Indicates lower value for Yucaipa

**Note:** Sales data for "Apparel Stores" in Yucaipa omitted by California Board of Equalization to avoid disclosure of confidential information. Sales data for Apparel Stores included in "Other Retail" category.

**Source:** California Retail Survey (2012)

# Per Outlet Retail Sales by Category

## Yucaipa & Comparison Regions

Sales Per Outlet in 2011 (\$000s)	Yucaipa	Redlands	San Bern. (City)	Colton	Riverside (City)	Moreno Valley	Beaumont	County of San Bern.	County of Riverside	State of California
<b>Categories more relevant to Uptown</b>										
Apparel Stores	N/A	\$349	\$190	\$70	\$399	\$348	N/A	\$392	\$464	\$453
Home Furn. & App.	\$69	\$238	\$385	\$948	\$458	\$241	\$910	\$517	\$482	\$565
Other Retail Stores	\$79	\$82	\$49	\$451	\$84	\$74	\$214	\$119	\$87	\$114
Grocery	\$1,099	\$1,297	\$575	\$807	\$914	\$1,070	\$957	\$965	\$1,163	\$828
Restaurants & Bars	\$429	\$527	\$508	\$427	\$566	\$577	\$498	\$565	\$573	\$555
<b>Categories less relevant to Uptown</b>										
Gen. Merchandise	\$743	\$2,893	\$2,087	N/A	\$2,788	\$4,895	\$1,285	\$2,314	\$3,404	\$2,482
Building Materials	\$466	\$2,787	\$1,975	N/A	\$1,459	\$1,975	N/A	\$1,881	\$1,955	\$1,937
Auto Dealers & Supp.	\$422	\$2,800	\$1,077	\$982	\$2,170	\$1,328	\$689	\$1,155	\$1,400	\$1,447
Service Stations	\$4,903	\$5,206	\$4,175	\$4,462	\$5,131	\$4,803	\$7,539	\$5,124	\$5,572	\$4,480
<b>Retail Stores Total</b>	<b>\$292</b>	\$497	\$346	\$645	\$508	\$602	\$366	\$508	\$520	\$503

Key:  Indicates higher value for Yucaipa

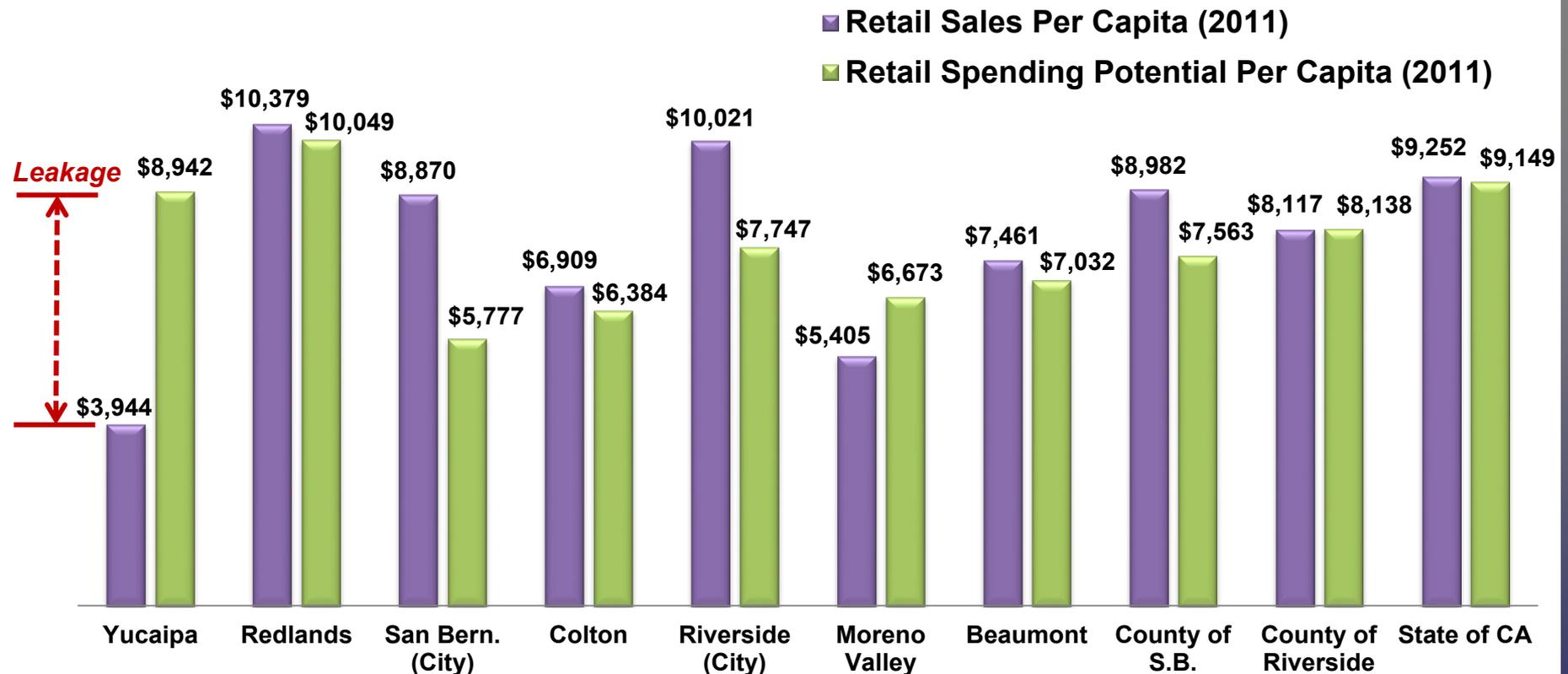
Indicates lower value for Yucaipa

**Note:** Sales data for "Apparel Stores" in Yucaipa omitted by California Board of Equalization to avoid disclosure of confidential information. Sales data for Apparel Stores included in "Other Retail" category.

**Source:** California Retail Survey (2012)

# Retail Sales Surplus / Leakage

## “Cash Registers vs. Wallets”



### Sales Capture / Leakage Per Capita:

(\$4,998)	\$330	\$3,092	\$525	\$2,273	(\$1,268)	\$429	\$1,419	(\$21)	\$102
(56%)	3%	54%	8%	29%	(19%)	6%	19%	0%	1%

**Note:** Spending potential based on number of households, average household income, and estimated percentage of income spent on retail goods and services

**Source:** CA Retail Survey (2012); U.S. Census Bureau (2010); Bureau of Labor Statistics (2011); ESRI (2013)

# Retail Sales Surplus / Leakage by Category

## City of Yucaipa

Retail Category	Retail Spending Potential (2011)	Retail Sales (2011)	Retail Surplus / Leakage (\$000s)	Percent Surplus / Leakage
<b><u>Uptown Categories:</u></b>				
Apparel Stores*	N/A	N/A	N/A	N/A
Home Furn. & Appliances	\$25,312	\$2,432	\$22,880	(90%)
Other Retail Stores*	\$93,285	\$32,842	\$60,443	(65%)
Grocery Stores	\$27,252	\$28,088	(\$836)	3%
Restaurants & Bars	\$59,982	\$37,031	\$22,951	(38%)
<b>Category Subtotal</b>	<b>\$205,830</b>	<b>\$100,393</b>	<b>\$105,438</b>	<b>(51%)</b>
<b><u>Non-Uptown Categories:</u></b>				
General Merchandise	\$78,945	\$7,124	\$71,821	(91%)
Building Materials	\$29,537	\$10,420	\$19,118	(65%)
Auto Dealers & Supplies	\$69,001	\$23,385	\$45,615	(66%)
Service Stations	\$79,148	\$62,657	\$16,491	(21%)
<b>Category Subtotal</b>	<b>\$256,631</b>	<b>\$103,586</b>	<b>\$153,045</b>	<b>(60%)</b>
<b>Total Retail</b>	<b>\$462,461</b>	<b>\$203,978</b>	<b>\$258,483</b>	<b>(56%)</b>

\* "Apparel" sales included in "Other Retail Stores"; "Other Retail" also includes health & personal care stores, sporting goods, hobby book & music stores, and miscellaneous store retailers.

Source: CA Retail Survey (2012); U.S. Census Bureau (2010); Bureau of Labor Statistics (2011); ESRI (2013)

# Net Supportable Retail Square Footage by Category

## City of Yucaipa

Retail Category	Retail Surplus / Leakage (\$000s)	Est. Expected Sales / SF	Est. Net Supportable Retail SF (2011)
<b><u>Uptown Categories:</u></b>			
Apparel Stores*	N/A	N/A	N/A
Home Furn. & Appliances	\$22,880	\$300	76,267
Other Retail Stores*	\$60,443	\$300	201,477
Grocery Stores	(\$836)	\$400	(2,090)
Restaurants & Bars	\$22,951	\$450	51,002
<b>Category Subtotal</b>	<b>\$105,438</b>		<b>326,656</b>
<b><u>Non-Uptown Categories:</u></b>			
General Merchandise	\$71,821	\$300	239,404
Building Materials	\$19,118	\$500	38,235
Auto Dealers & Supplies	\$45,615	\$500	91,231
Service Stations	\$16,491	\$1,200	13,742
<b>Category Subtotal</b>	<b>\$153,045</b>		<b>382,612</b>
<b>Total Retail</b>	<b>\$258,483</b>		<b>709,269</b>

\* "Apparel" sales included in "Other Retail Stores"; "Other Retail" also includes health & personal care stores, sporting goods, hobby book & music stores, and miscellaneous store retailers.

**Notes:** Conservative estimates, do not include allowance for vacancy or ancillary/service area

**Source:** HdL Companies (2012), International Council of Shopping Centers (2012), Kosmont Companies (2013)

# Projected Net Supportable Retail SF (Cumulative)

*City of Yucaipa*

Retail Category	2011	2012	2013	2014	2015	2016	2017
<b><u>Uptown Categories:</u></b>							
Apparel Stores*	N/A						
Home Furn. & Appliances	76,267	79,458	79,993	80,530	81,071	81,615	82,162
Other Retail Stores*	201,477	213,236	215,205	217,186	219,178	221,183	223,200
Grocery Stores	(2,090)	486	918	1,352	1,788	2,227	2,669
Restaurants & Bars	51,002	56,044	56,887	57,736	58,591	59,450	60,314
<b>Category Subtotal</b>	<b>326,656</b>	<b>349,224</b>	<b>353,003</b>	<b>356,804</b>	<b>360,628</b>	<b>364,475</b>	<b>368,345</b>
<b><u>Non-Uptown Categories:</u></b>							
General Merchandise	239,404	249,357	251,023	252,699	254,385	256,082	257,789
Building Materials	38,235	40,469	40,843	41,219	41,598	41,979	42,362
Auto Dealers & Supplies	91,231	96,450	97,324	98,203	99,087	99,977	100,872
Service Stations	13,742	16,237	16,654	17,075	17,497	17,922	18,350
<b>Category Subtotal</b>	<b>382,612</b>	<b>402,513</b>	<b>405,844</b>	<b>409,196</b>	<b>412,567</b>	<b>415,960</b>	<b>419,373</b>
<b>Total Retail</b>	<b>709,269</b>	<b>751,737</b>	<b>758,846</b>	<b>765,999</b>	<b>773,195</b>	<b>780,434</b>	<b>787,718</b>

\* "Apparel" sales included in "Other Retail Stores"; "Other Retail" also includes health & personal care stores, sporting goods, hobby book & music stores, and miscellaneous store retailers.

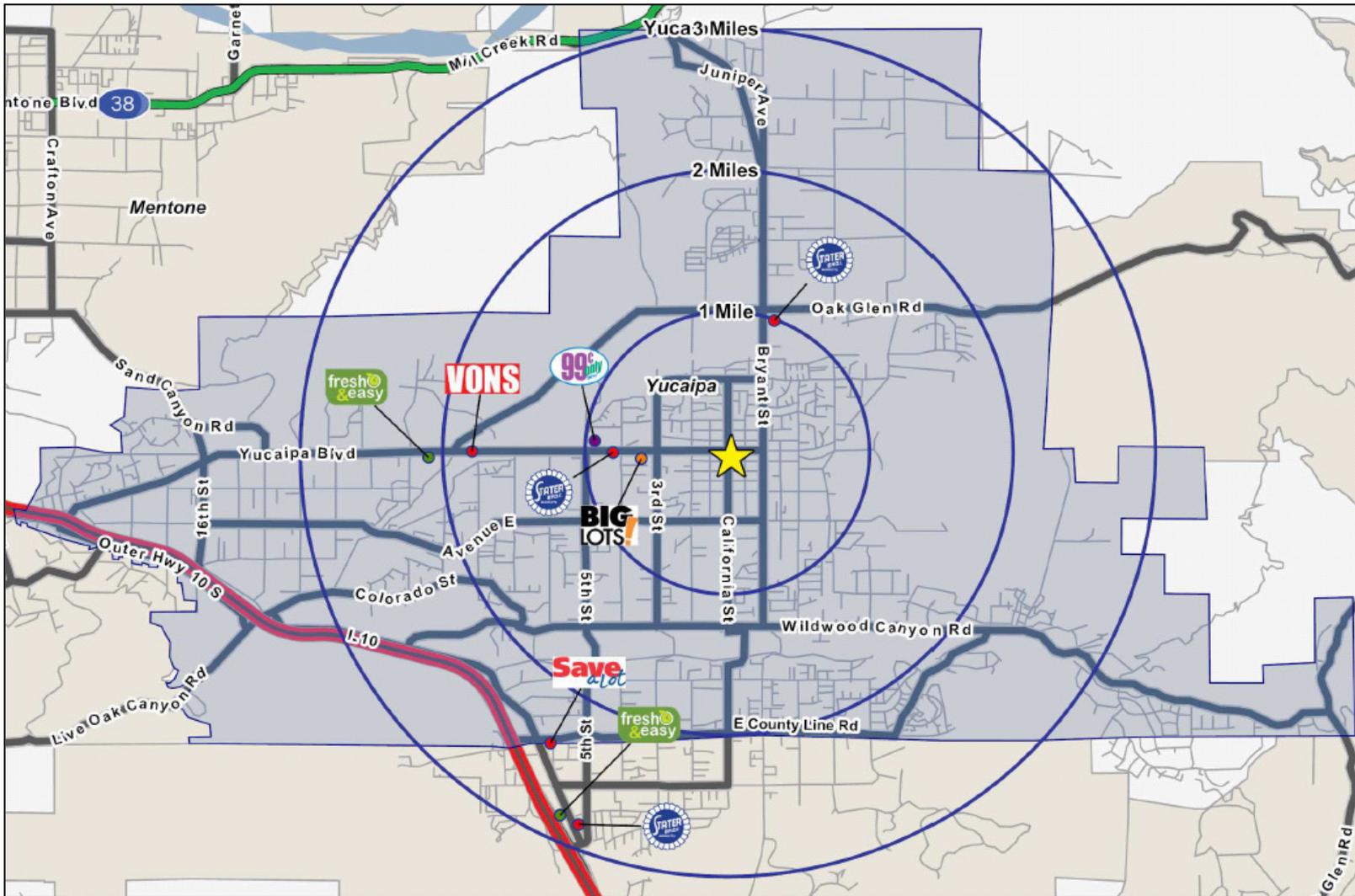
**Note:** Cumulative demand based on ESRI projections of household and household income growth

**Source:** ESRI, Kosmont Companies (2013)

# Trade Area Retailer Voids

# Retailer Concentrations

## Grocers & Dollar Stores



# National Retailer Voids

## *With Potential Applicability to Uptown*

Retailer	Category	Closest Location to Uptown	Current Locations	Min SF	Max SF	New Locations Planned Next Year	New Locations Planned Next 2 Years
<b>Comerica Bank</b>	Banks	29.26 Mi NW	565	4,000	4,500	50	100
<b>Hancock Fabrics</b>	Craft / Fabric Stores	9.70 Mi NW	265	10,000	13,000	10	20
<b>Marshalls</b>	Discount Dept. Stores	10.13 Mi NW	872	25,000	30,000	10	20
<b>TJ Maxx</b>	Discount Dept. Stores	14.45 Mi SW	956	25,000	30,000	10	20
<b>Dollar General</b>	Dollar Stores	37.43 Mi NW	9,641	9,000	10,000	625	1,200
<b>Dollar Tree</b>	Dollar Stores	9.03 Mi SE	4,000	8,000	12,000	300	600
<b>Family Dollar</b>	Dollar Stores	20.22 Mi NW	7,000	7,800	10,000	300	600
<b>Anytime Fitness</b>	Fitness	8.42 Mi NW	1,500	3,000	5,000	125	250
<b>Crunch Fitness</b>	Fitness	-	-	-	-	-	-
<b>Curves</b>	Fitness	-	-	-	-	-	-
<b>Planet Fitness</b>	Fitness	13.57 Mi NW	325	12,000	20,000	10	20
<b>HomeGoods</b>	Furniture / Household	14.49 Mi SW	350	24,000	26,000	10	20

**Note:** Potential applicability to Uptown determined based on perceived fit for Uptown, retailer demographic preferences and expansion activity

**Source:** Sites USA, Kosmont Companies (2013)

# National Retailer Voids – Restaurants

## *With Potential Applicability to Uptown*

Restaurant	Restaurant Category	Closest Location to Uptown	Current Locations	Min SF	Max SF	New Locations Planned Next Year	New Locations Planned Next 2 Years
<b>Bruegger's</b>	Bakery / Bagels	34.47 Mi SW	300	1,800	2,200	50	100
<b>Corner Bakery</b>	Bakery / Bagels	9.10 Mi NW	115	3,400	4,400	10	20
<b>Einstein Bros</b>	Bakery / Bagels	40.82 Mi SE	300	2,100	3,000	10	20
<b>Panera Bread</b>	Bakery / Bagels	7.70 Mi NW	1,493	3,500	4,500	100	200
<b>Applebee's</b>	Casual	8.76 Mi SE	2,000	5,000	6,000	5	10
<b>Baja Fresh</b>	Casual	13.41 Mi NW	300	600	1,200	20	40
<b>Beef O' Brady's</b>	Casual	33.57 Mi NW	214	3,600	4,200	12	24
<b>Buffalo Wild Wings</b>	Casual	15.12 Mi SW	773	4,000	7,000	80	160
<b>Chili's</b>	Casual	8.99 Mi SE	1,526	3,900	5,500	1	1
<b>Chipotle</b>	Casual	8.45 Mi NW	1,095	1,800	2,800	165	330
<b>Claim Jumper</b>	Casual	14.10 Mi NW	35	8,000	12,000	5	10
<b>Five Guys</b>	Casual	10.11 Mi NW	750	2,000	3,000	600	850
<b>Fuddruckers</b>	Casual	29.80 Mi NW	200	600	7,000	20	40
<b>IHOP</b>	Casual	10.06 Mi NW	1,504	4,000	7,000	5	10
<b>Joe's Crab Shack</b>	Casual	28.96 Mi NW	119	6,500	8,500	20	40
<b>Johnny Rockets</b>	Casual	28.72 Mi NW	295	850	2,500	40	80
<b>Marie Callender's</b>	Casual	25.20 Mi SW	87	4,500	7,000		
<b>Olive Garden</b>	Casual	14.45 Mi SW	743	6,400	7,500	40	80
<b>On The Border</b>	Casual	29.69 Mi SW	162	3,600	6,000	4	8
<b>Qdoba</b>	Casual	10.11 Mi NW	550	2,200	2,400	10	20

**Note:** Potential applicability to Uptown determined based on perceived fit for Uptown, retailer demographic preferences and expansion activity

Source: Sites USA, Kosmont Companies (2013)

# National Retailer Voids – Restaurants

## *With Potential Applicability to Uptown*

Restaurant	Restaurant Category	Closest Location to Uptown	Current Locations	Min SF	Max SF	New Locations Planned Next Year	New Locations Planned Next 2 Years
Red Lobster	Casual	14.22 Mi NW	694	7,000	8,000	20	40
Red Robin	Casual	9.92 Mi NW	453	5,700	6,000	10	20
Rubio's	Casual	8.46 Mi NW	280	2,400	3,000	15	30
Sizzler	Casual	8.48 Mi NW	180	5,000	6,000	5	10
Texas Roadhouse	Casual	25.10 Mi SW	340	6,500	7,500	15	30
Dunkin Donuts	Coffee/Donuts	-	-	-	-	-	-
Baskin-Robbins	Ice Cream / Smoothie	8.14 Mi NW	2,700	1,000	1,500	200	400
Ben & Jerry's	Ice Cream / Smoothie	28.81 Mi NW	400	100	1,500	10	20
Pinkberry	Ice Cream / Smoothie	28.98 Mi NW	115	1,000	2,000	5	10
Surf City Squeeze	Ice Cream / Smoothie	14.82 Mi SE	179	250	250	30	60
CiCi's Pizza	Pizza	29.38 Mi SW	650	3,600	4,000	50	100
Hungry Howie's	Pizza	33.07 Mi NW	575	1,000	1,500	35	90
Papa Murphy's	Pizza	33.70 Mi SW	1,200	1,000	1,500	100	150
Sbarro	Pizza	14.64 Mi SW	1,000	650	900		
Shakeys	Pizza	9.14 Mi NW	54	5,500	7,000	5	10
Blimpie	Sandwich	10.60 Mi SW	1,600	1,400	1,800	75	150
Port of Subs	Sandwich	42.31 Mi SE	150	1,000	1,500	10	25
Quiznos	Sandwich	9.22 Mi SE	5,100	1,000	1,600	600	1,200

**Note:** Potential applicability to Uptown determined based on perceived fit for Uptown, retailer demographic preferences and expansion activity

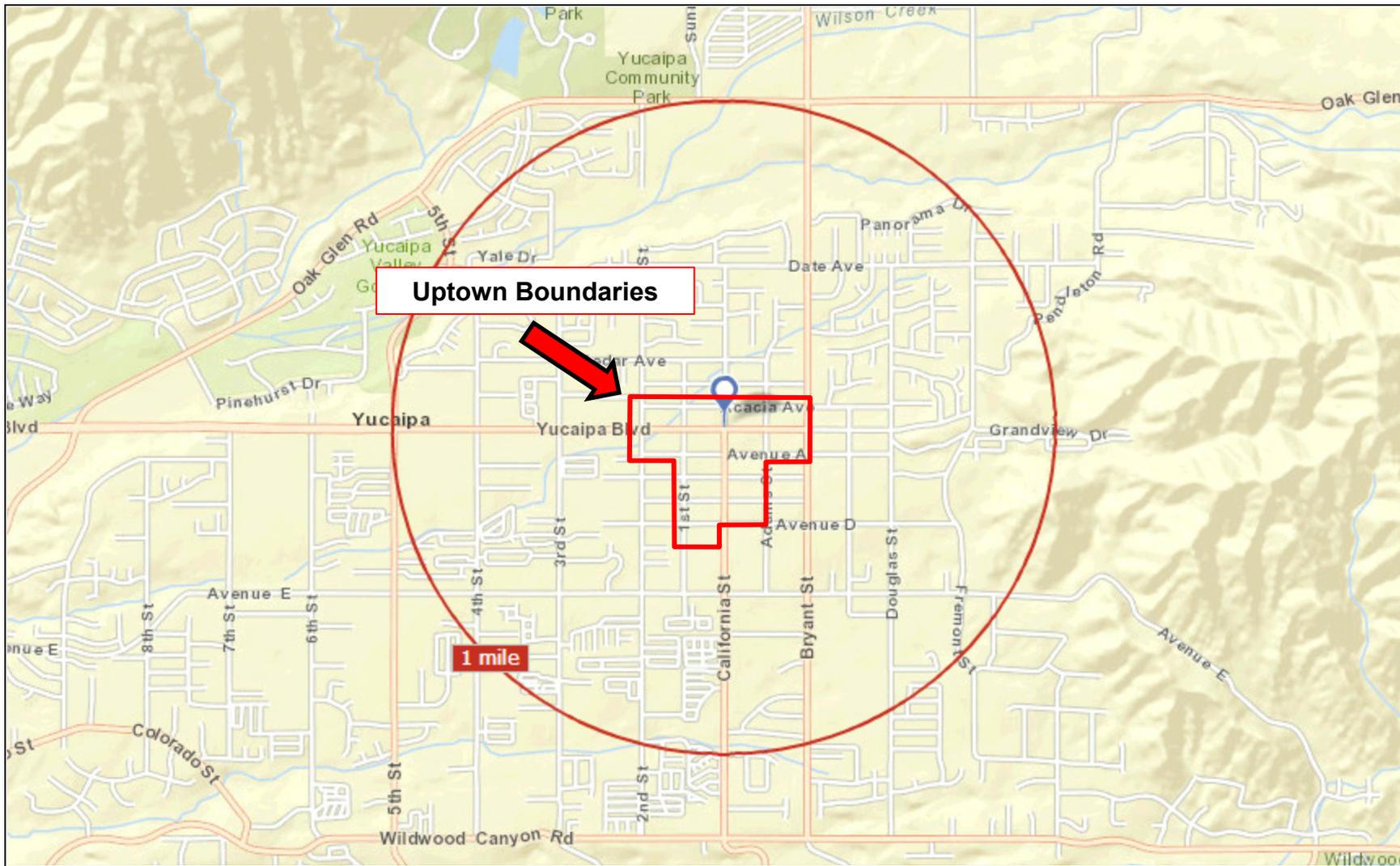
Source: Sites USA, Kosmont Companies (2013)

# Summary: Retail

- Yucaipa retail submarket vacancy is high, but has been declining.
- Taxable retail sales per capita for the City is relatively low when compared to neighboring cities and benchmark regions.
- Retail categories most applicable to Uptown include Apparel, Home Furniture & Appliances, Other Retail, Grocery, and Restaurants & Bars.
- Grocery and Service Stations are highest-performing retail categories for Yucaipa compared to neighboring jurisdictions based on per capita and per outlet sales.
- Yucaipa is experiencing sales leakage across all major retail categories except for grocery, suggesting that City residents are likely making non-grocery retail purchases outside of the City (and City is likely not capturing non-grocery sales by residents of other jurisdictions).
- Retailer voids include soft goods, dollar stores, fitness and restaurants.

# Potential for Mixed-Use Residential

# Projected Household Growth



Source: ESRI (2013)

# Projected Household Growth

Households	2012	2017	Net
City of Yucaipa	18,609	19,184	+575
<i>Owner</i>	13,450	14,086	+636
<i>Renter</i>	5,159	5,098	-61
W/in 1 mile of Yucaipa & California	5,184	5,312	+128
<i>Owner</i>	3,380	3,539	+159
<i>Renter</i>	1,804	1,773	-31

- 575 new households projected for the City over the next 5 years – 128 new households within 1 mile of Yucaipa Blvd. & California Street in Uptown
- Owner households are projected to **increase** both Citywide and within 1 mile of Uptown area, while renter households are projected to **slightly decrease**

# Summary: Housing and Mixed-Use

- Yucaipa housing stock is relatively new and inexpensive.
- Nationwide, demand for urban-style residential-over-retail living is increasing in densely populated downtown neighborhoods and central business districts.
  - Drivers for this format include the pursuit of **cultural amenities**, **traffic congestion**, and **long commute times** into places of employment and do not currently apply to Uptown as most City residents are employed outside of the City (they may apply in the future).
- Current residential market conditions face difficulty in obtaining financing for mixed-use, for-sale residential development.
  - While rental projects have been able to obtain financing, number of renter households are projected to **slightly decrease** in the local Uptown market.

# Summary: Housing and Mixed-Use

- Based on empirical measures, mixed-use residential does not appear viable in the near-term (0-3 years), but likely that factors such as a housing recovery, increased developer appetite for for-sale housing based on demand, continued job growth, and higher gasoline prices will lead to longer term potential feasibility.
- Nonetheless, the Uptown senior housing project experienced full absorption within one month and there is continued interest from the developer in additional senior housing and possibly multifamily housing.

# Uptown Opportunity Site Assessment

# Uptown Opportunity Site Assessment

- Several locations within Uptown were emphasized by the City and evaluated by the City/Consultant Team as potential Opportunity Sites for potential retail / mixed-use development
- Strengths, Challenges, and Opportunities were assessed for the Opportunity Sites in consideration of feasibility for retail / mixed-use development

# Opportunity Site Overview



Red line depicts Uptown boundaries

# Area # 1: NWC Yucaipa Blvd. & California St.

- 2.9 acres (approx.)
- Owned by Yucaipa Investments LLC, et al. (tenancy in common)
- Zoned commercial



## Strengths

- Strong intersection at Yucaipa & California
- Uptown streetscape improvements in place
- Commercial zoning

## Challenges

- Owner relations
- Surrounding vacancies
- Low demand for mixed-use residential component

## Opportunities

- **Suitable for neighborhood retail and/or mixed-use**
- Potential of acquisition of neighboring parcels
- Potential Specific Plan-related zoning strategies

# Area # 2: Yucaipa Blvd. between California & Adams

- 0.14 acres (approx.) owned by City of Yucaipa
- 0.62 acres (approx.) owned by Donald E. Majestic
- **0.8 acres (approx.) Total**
- Zoned commercial



## Strengths

- Location on Yucaipa Blvd. near California Street
- Partial City ownership
- Commercial zoning

## Challenges

- Mid-block location
- Potentially unmotivated partial owner

## Opportunities

- **Potential for shop retail**
- Potential Specific Plan-related zoning strategies

# Area # 3: Yucaipa Blvd. between Adams & Bryant

- 0.7 acres (approx.)
- Owned by Christopher A. Stark
- Zoned commercial



## Strengths

- Location on Yucaipa Blvd. near California Street
- Single ownership
- Commercial zoning

## Challenges

- Potentially unmotivated owner
- Demolition of existing housing

## Opportunities

- **Potential for shop retail**
- Potential Specific Plan-related zoning strategies

# Area # 4: 1<sup>st</sup> Street between Avenues A & B

- 1.0 acre (approx.)
- Owned by City of Yucaipa
- Zoned commercial



## Strengths

- Near strong intersection at Yucaipa & California
- City ownership
- Corner location
- Commercial zoning

## Challenges

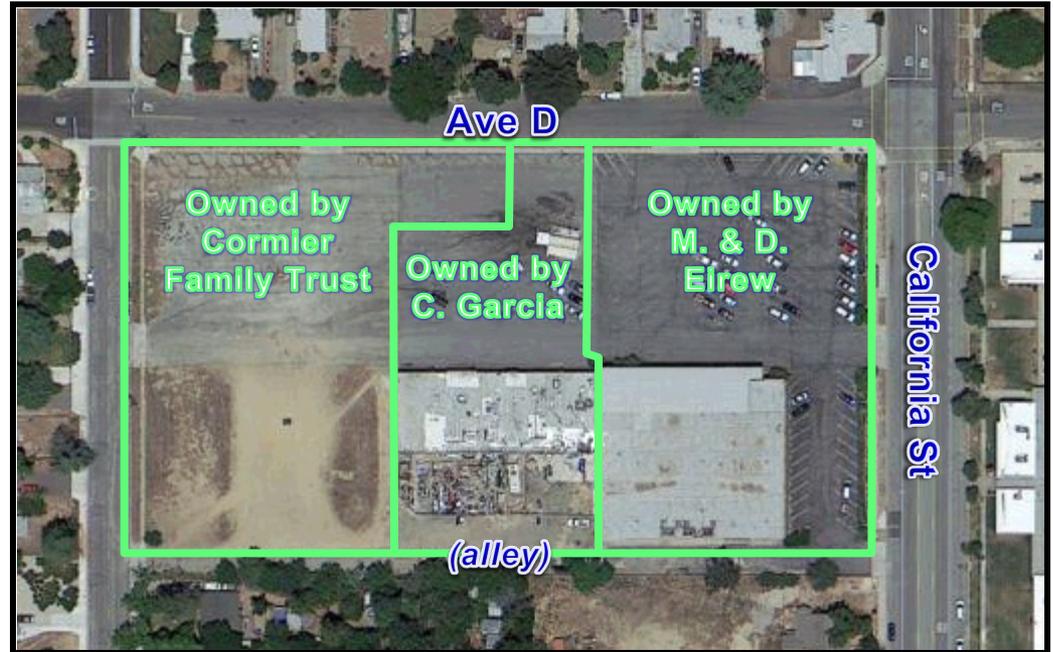
- Distance from primary intersection at Yucaipa & California

## Opportunities

- Relocation of existing Community Center
- Very limited potential for mixed-use
- Potential Specific Plan-related zoning strategies (incl. expansion of Uptown District boundary to include property south of alley)

# Area # 5: SWC California & Avenue D

- 1.9 acres (approx.) owned by Melvin & Delores Eirew (corner)
- 1.8 acres (approx.) owned by Cormier Family Trust
- 1.1 acres (approx.) owned by Carlos J. Garcia
- **4.8 acres (approx.) Total**
- Zoned commercial



## Strengths

- Corner location on California
- Successful drug store on corner
- Commercial zoning

## Challenges

- Multiple ownership
- Distance from primary intersection at Yucaipa & California

## Opportunities

- Potential for relocation of drug store to smaller location in Uptown
- **Potential for retail re-use and/or mixed-use**
- Potential Specific Plan-related zoning strategies

## Implementation

- Findings
- Next Steps

# Findings and Next Steps

# Findings – Demos & Retail

## Demographics & Employment

- Cater to local population with strong and increasing household incomes
- Serve residents that are younger, family-oriented, budget conscious, and active outdoors
- Support low unemployment workforce

## Retail

- **Pursue attraction of retail categories most applicable to Uptown** including Apparel, Home Furniture & Appliances, Other Retail, Grocery (e.g. specialty / independent), and Restaurants & Bars
- Increase capture of resident and non-resident spending, particularly in non-grocery retail categories, given relatively low sales per capita and prevalent sales leakage

# Findings – Mixed-Use & Econ Dev

## Housing & Mixed-Use

- Housing and mixed-use development limited in Uptown by residential demand and availability of financing in near-term (0-3 years)
- Key driver in absence of high residential demand may be for **City to provide incentives**
- Promote primary opportunity site within Uptown for retail / mixed-use development at northwest corner of Yucaipa Blvd. and California Street

## Economic Development without Redevelopment

- Dissolution of redevelopment agencies will continue to have a negative effect on most California Cities and impact to health of general fund
- Alternative economic tools should be explored for Yucaipa to retain and improve retail base and facilitate potential public-private transactions
- **Zoning strategies** within the context of the Uptown Specific Plan Amendment process are a good example of creative incentives for development

# Economic Development Tools

- City may consider evaluation of potential economic development tools & strategies on case-by-case / transactional basis:

## Local Level

- Site-specific tax revenue (“SSTR”) pledges
- Impact fee reductions / waivers / deferrals
- Development opportunity reserve (“DOR”)
- Tax-exempt revenue & utility bonds
- Lease-leaseback financing
- Ground leases
- Operating covenants
- Façade improvement program

## State & Federal Level

- Small Business Administration (SBA) loans
- U.S. Economic Development Administration (EDA) grants
- New Market Tax Credits (NMTCs)
- CA Infrastructure Bank (I-Bank) loans
- EB-5 Immigrant Investment

# Next Steps for Implementation

- Based on evaluated opportunity sites, compatible retailer voids and retail sales leakage, City & Consultant Team should outreach to targeted retailers and developers:
  - Prepare marketing collateral material to promote City and opportunity sites (incl. site demographics, parcel info, ownership, etc.)
  - Create targeted list of retailers and developers for outreach
  - Outreach to retailers and developers (incl. email outreach, conference calls, meetings / site tours, conference participation at [ICSC RECon Las Vegas, May 19-22, 2013](#))
- City should establish creative economic development tools and incentives, such as zoning strategies (incl. Development Opportunity Reserve within Uptown Specific Plan amendment)

# Appendices

# Draft Marketing Flyer

## Front

### City of Yucaipa - Uptown **DRAFT**

#### Retail/Mixed-Use Development Opportunity

NWC Yucaipa Boulevard & California Street



~2.9 Acres Owned by Yucaipa Investments LLC, et al. (Tenancy in Common)

#### FEATURES:

- Location at major intersection in Uptown Business District
- Significant City investment in streetscape improvements
- Uptown Specific Plan allows mixed-use
- Infill location with strong demographics
- Traffic counts (2013): ADT **TBD** on Yucaipa @ California

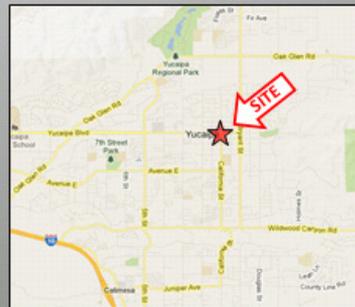
#### DEMOGRAPHICS (2011; ESRI):

2012	1 Mile	2 Mile	3 mile
Population	14,258	35,806	51,889
Households	5,184	12,974	18,639
Avg. HH Income	\$61,266	\$67,505	\$67,494

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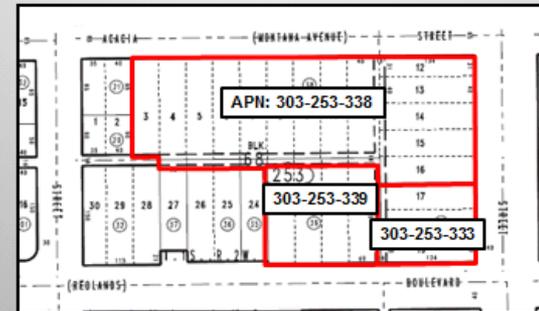
Do not rely on any measurements or placements of any improvements depicted or shown herein, as they are estimates only. The information above has been obtained from sources believed reliable. While we do not doubt its accuracy, we have not verified the data and make no guarantee, warranty or representation whatsoever. It is your responsibility to independently confirm its accuracy and completeness. Any projections, opinions, assumptions or estimates used are for example only and do not represent the current or future performance of the property. The value of this transaction to you depends on tax and other factors, which should be evaluated by your tax, financial and legal advisors. You and your advisors should conduct a careful, independent investigation of the property to determine to your satisfaction the suitability of the property for your needs. Development commitments subject to City approval.

## Back

**DRAFT**

#### Retail/Mixed-Use Development Opportunity

NWC Yucaipa Boulevard & California Street



Parcels 303-253-333, 338, and 339 Owned by Yucaipa Investments LLC et al.  
(Tenancy in Common)



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Do not rely on any measurements or placements of any improvements depicted or shown herein, as they are estimates only. The information above has been obtained from sources believed reliable. While we do not doubt its accuracy, we have not verified the data and make no guarantee, warranty or representation whatsoever. It is your responsibility to independently confirm its accuracy and completeness. Any projections, opinions, assumptions or estimates used are for example only and do not represent the current or future performance of the property. The value of this transaction to you depends on tax and other factors, which should be evaluated by your tax, financial and legal advisors. You and your advisors should conduct a careful, independent investigation of the property to determine to your satisfaction the suitability of the property for your needs. Development commitments subject to City approval.

# National Retailer Voids Per Sites USA

## *Within City of Yucaipa*

### Auto Parts / Tires

America's Tire  
Big O Tires  
CARQUEST  
**Goodyear**  
**Pep Boys**

### Banks

Bank of the West  
California Bank-Trust  
**Comerica Bank**  
Community Bank  
Compass Bank  
East West Bank  
First-Citizens Bank & Trust Co.  
First Bank  
Rabobank  
Union Bank

### Book Stores

Barnes & Noble

### Clothing Apparel

**Abercrombie & Fitch**  
**Aeropostale**  
**American Eagle Outfitters**  
Ann Taylor Factory  
Ann Taylor Loft  
Ann Taylor Loft Outlet  
**Anthropologie**

### **Banana Republic**

BCBG Max Azria  
**bebe**  
Buckle  
Catherines  
Charlotte Russe  
Chico's

### **Citi Trends**

**Coldwater Creek**  
**dd's DISCOUNTS**

Dress Barn

### **Express**

### **Factory 2-U**

### **Fallas Paredes**

Fashion Bug

### **Forever 21**

### **Fossil**

### **Gap**

### **H And M**

### **Hollister Co.**

### **J. Crew**

### **J. Jill**

Jos. A. Bank

Lane Bryant

Lucky Brand Jeans

Men's Wearhouse

### **New York & Company**

### **Nordstrom Rack**

### **Old Navy**

PacSun

### **Rainbow**

Rue21

### **Saks OFF 5TH**

### **Talbots**

The Childrens Place

### **Victoria's Secret**

Wet Seal

White House | Black Market

### Computers / Electronic

### **Apple Store**

Best Buy

### Convenience Stores

### **Circle K**

### Craft / Fabric Stores

Aaron Brothers

### **Hancock Fabrics**

Hobby Lobby

Jo-Ann

Michaels

### Department Stores

Barneys New York

Burke's Outlet

### **JCPenney**

### **Macy's**

Neiman Marcus

Nordstrom

Saks Fifth Avenue

### Discount Department Stores

Burlington Coat Factory

David's Bridal

Kmart

### **Kohl's**

### **Marshalls**

Sears

Stein Mart

SuperTarget

### **Target**

### **TJ Maxx**

Tuesday Morning

### **Wal-Mart**

Wal-Mart Supercenter

### Dollar Stores

### **Dollar General**

### **Dollar Tree**

### **Family Dollar**

### Drug Stores

Savon

*Note: Retailers not highlighted were determined to be incompatible based on retailer demographic preferences and expansion activity*

# National Retailer Voids Per Sites USA

## *Within City of Yucaipa*

### Fitness

24 Hour Fitness  
**Anytime Fitness**  
 Gold's Gym  
 LA Fitness  
**Planet Fitness**  
 World Gym  
 YMCA

### Furniture / Household

Anna's Linens  
 Ashley Furniture  
 Bassett  
 Bed Bath & Beyond  
 Cost Plus  
**Crate and Barrel**  
**Ethan Allen**  
**HomeGoods**  
 Jennifer Convertibles  
**La-Z-Boy**  
**LAMPS PLUS**  
 Pier 1  
**Pottery Barn**  
**Sur La Table**  
**Williams-Sonoma**  
 Z Gallerie

### Grocery Stores

**Albertsons**  
 Bashas

Cardenas

**El Super**  
 Food 4 Less  
 Grocery Outlet  
 IGA  
 Pavilions  
 Ralphs  
**Sprouts**  
**Superior Grocers**  
 Trader Joe's  
 Vallarta Supermarkets  
**WinCo Foods**

### Home Improvement

Do It Best  
**Dunn-Edwards**  
 Home Depot  
 ICI Paints  
 Kelly-Moore  
 Lowe's  
**Orchard**  
 Probuild  
**Sherwin-Williams**  
 True Value

### Office Supply

Office Depot  
 Office Max

### Pet Stores

Petco  
 PetsMart

### Restaurants - Bakery / Bagels

**Bruegger's**  
**Corner Bakery**  
**Einstein Bros**  
**Panera Bread**

### Restaurants - Casual

**Applebee's**  
**Baja Fresh**  
**Beef O' Brady's**  
 BJ's Restaurant & Brewery  
**Buffalo Wild Wings**  
 California Pizza Kitchen  
 Carino's  
 Chevys  
**Chili's**  
**Chipotle**  
**Claim Jumper**  
 Coco's  
 Elephant Bar  
 Famous Dave's  
**Five Guys**  
 Fleming's  
**Fuddruckers**  
 Golden Corral  
 Hooters

### IHOP

**Joe's Crab Shack**  
**Johnny Rockets**  
 Logan's Roadhouse  
 Macaroni Grill  
**Marie Callender's**  
 Mimis Cafe  
 Morton's  
**Olive Garden**  
**On The Border**  
 Outback Steakhouse  
 P.F. Chang's  
 Pick Up Stix  
**Qdoba**  
 Rainforest Cafe  
**Red Lobster**  
**Red Robin**  
**Rubio's**  
 Ruth's Chris  
 Ryan's  
**Sizzler**  
 T.G.I. Friday's  
**Texas Roadhouse**  
 The Cheesecake Factory

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# National Retailer Voids Per Sites USA

## *Within City of Yucaipa*

### Restaurants - Coffee / Donuts

It's A Grind

#### **Krispy Kreme**

Seattle's Best Coffee

The Coffee Bean

Winchell's

### Restaurants - Fast Food Major

#### **Arby's**

Burger King

Sonic

#### **Wendy's**

### Restaurants - Fast Food Minor

A&W

#### **Boston Market**

#### **Chick-fil-A**

#### **Church's Chicken**

#### **Fazoli's**

In-N-Out

Popeyes

### Restaurants - Ice Cream / Smoothie

#### **Baskin-Robbins**

#### **Ben & Jerry's**

Cold Stone Creamery

Jamba Juice

Juice It Up!

NRgize

Orange Julius

#### **Pinkberry**

Robeks

#### **Surf City Squeeze**

TCBY

### Restaurants - Pizza

Chuck E. Cheese's

#### **CiCi's Pizza**

Godfather's Pizza

#### **Hungry Howie's**

#### **Papa Murphy's**

Pizza Patron

Round Table

#### **Sbarro**

#### **Shakeys**

### Restaurants - Sandwich

#### **Blimpie**

Charley's Grilled Subs

Jason's Deli

Jersey Mike's

#### **Port of Subs**

#### **Quiznos**

Schlotzsky's Deli

Togo's

### Sporting Goods

#### **Bass Pro Shops**

#### **Big 5**

#### **Dick's**

#### **Golfsmith**

REI

Roger Dunn Golf Shops

Sport Chalet

Sports Authority

### Wholesale

Costco

#### **Sam's Club**

Smart & Final

### Wireless Stores

AT&T

Sprint

T-Mobile

Verizon Wireless

*Note: Retailers not highlighted were determined to be incompatible based on retailer demographic preferences and expansion activity*