National City Real Estate Roundtable
Barry Foster
Managing Principal of Econsolutions by HDL
WHAT IS INSIGHT MARKET ANALYTICS AND WHY IS IT IMPORTANT?

Includes the following:
• Maps
• Consumer Demographic Profiles
• Household Segmentation Profiles
• Employment Profiles
• Consumer Demand & Market Supply Assessments
SELECTING SITES

• City Boundary
• Retail/Restaurant clusters
• Zoning Maps
• Opportunities (Vacancies, development sites, etc...)
• Collaborating with city staff
DEFINING A TRADE AREA

TYPES OF RETAIL CENTERS

Regional Mall, Power Center, Lifestyle Center

8 – 15 Mile T.A.
150 – 800K Square Feet
Large Anchor, Department Stores, General Merchandise, Upscale

Community/Neighborhood Center

3 – 6 Mile T.A.
3 – 400K Square Feet
Discount Department Store, Supermarket, Drug Store

Strip/Convenience Center

<1 – 3 Mile T.A.
< 30K Square Feet
Convenience Oriented, Mini Mart, Liquor Store
DEFINING A TRADE AREA CONT.

TENANT MIX

• Anchors
• Junior Anchors
• Inline Tenants
• End Caps
• Pad Sites
• Stand Alone Stores

• Multiple types of tenants occupy a single shopping center, creating the need to understand each tenant's unique trade area. ECONSolutions INSIGHT Market Analytics reports provide a side by side comparison serving the needs of the smallest inline tenants to the largest anchor stores.
NATIONAL CITY MARKET ANALYTICS
National City has Household LifeStage group differences when compared to San Diego County and the State of California:

(14.1%) Bargain Hunters  
Staying Home

(12.6%) Leisure Seekers  
Helping Hands  
Hobbies & Shopping

(8.6%) Busy Households  
Movies & Sports

(8.6%) Community Minded  
Persistent & Productive
<table>
<thead>
<tr>
<th></th>
<th>National City</th>
<th>San Diego County</th>
<th>California</th>
</tr>
</thead>
<tbody>
<tr>
<td>Daytime Population</td>
<td>63,069</td>
<td>3,894,858</td>
<td>44,511,066</td>
</tr>
<tr>
<td>Student Population</td>
<td>16,083</td>
<td>1,024,181</td>
<td>11,706,856</td>
</tr>
<tr>
<td>Median Employee Salary</td>
<td>41,515</td>
<td>43,929</td>
<td>45,748</td>
</tr>
<tr>
<td>Average Employee Salary</td>
<td>50,581</td>
<td>52,801</td>
<td>54,768</td>
</tr>
</tbody>
</table>

**Wages**

Salary/Wage per Employee per Annum

<table>
<thead>
<tr>
<th>Salary/Wage per Year</th>
<th>National City</th>
<th>San Diego County</th>
<th>California</th>
</tr>
</thead>
<tbody>
<tr>
<td>Under $15,000</td>
<td>822</td>
<td>45,049</td>
<td>570,613</td>
</tr>
<tr>
<td>15,000 to 30,000</td>
<td>4,826</td>
<td>300,901</td>
<td>3,092,111</td>
</tr>
<tr>
<td>30,000 to 45,000</td>
<td>8,147</td>
<td>553,541</td>
<td>5,468,040</td>
</tr>
<tr>
<td>45,000 to 60,000</td>
<td>4,323</td>
<td>398,617</td>
<td>3,233,174</td>
</tr>
<tr>
<td>60,000 to 75,000</td>
<td>1,621</td>
<td>121,728</td>
<td>1,833,037</td>
</tr>
<tr>
<td>75,000 to 90,000</td>
<td>1,525</td>
<td>100,314</td>
<td>1,526,547</td>
</tr>
<tr>
<td>90,000 to 100,000</td>
<td>739</td>
<td>47,554</td>
<td>564,161</td>
</tr>
<tr>
<td>Over 100,000</td>
<td>2,293</td>
<td>189,279</td>
<td>2,006,129</td>
</tr>
</tbody>
</table>

**Employee's by Occupation**
GAP Assessment

Uses data from the following sources:

- Consumer Expenditure Survey (CE), Bureau of Labor Statistics
- U.S. Census Bureau’s monthly and annual Retail Trade (CRT)
Sweetwater Road
Sweetwater Rd & E 30th St, National City, CA

<table>
<thead>
<tr>
<th></th>
<th>3 Minute</th>
<th>5 Minute</th>
<th>7 Minute</th>
</tr>
</thead>
<tbody>
<tr>
<td>Population</td>
<td>41,082</td>
<td>112,120</td>
<td>209,044</td>
</tr>
<tr>
<td>Daytime Population</td>
<td>39,127</td>
<td>106,816</td>
<td>187,575</td>
</tr>
<tr>
<td>Households</td>
<td>12,693</td>
<td>34,721</td>
<td>60,089</td>
</tr>
<tr>
<td>Average Age</td>
<td>37.2</td>
<td>37.5</td>
<td>36.6</td>
</tr>
<tr>
<td>Average HH Income</td>
<td>$56,323</td>
<td>$58,118</td>
<td>$60,897</td>
</tr>
<tr>
<td>White Collar (Residents)</td>
<td>47%</td>
<td>49%</td>
<td>51%</td>
</tr>
<tr>
<td>Some College or Degree</td>
<td>44%</td>
<td>45%</td>
<td>46%</td>
</tr>
</tbody>
</table>

Traffic Counts
- Sweetwater Rd & Prospect St: > 26,300
- E 30th St & L Ave: > 20,600
- Highland Ave & E 30th St: > 21,200
- I-805 @ Euclid Ave: > 200,000
Retail Assessment
Examined sales tax revenues over a five-year period (2011-2016)

<table>
<thead>
<tr>
<th>Major Industry Groups</th>
<th>Per Capita Analysis</th>
<th>Retailer &amp; Restaurant Performance</th>
</tr>
</thead>
</table>
Revenue Growth

Revenue Growth (2011 - 2016)

- National City: 31%
- San Diego County: 20%
- California: 23%
# Revenue Growth Continued

## New Motor Vehicle Dealers

<table>
<thead>
<tr>
<th>34%</th>
<th>49%</th>
<th>Removing new car sales revenues grew by 16%</th>
</tr>
</thead>
<tbody>
<tr>
<td>of sales tax revenues (2016)</td>
<td>of total growth (2011-2016)</td>
<td></td>
</tr>
</tbody>
</table>
Average Sales $’s Per Capita

Sales $ Per Capita - 2016

- National City: $25,834
- San Diego County: $14,817
- California: $14,545

Sales $ Per Capita Growth (2011-2016)

- National City: 26%
- San Diego County: 14%
- California: 17%
## Average Sales $’s Per Capita Continued

### Sales Dollars Per Capita Growth (2011-2016) By Major Industry Group

<table>
<thead>
<tr>
<th>Major Industry Group</th>
<th>National City Growth</th>
<th>San Diego County Growth</th>
</tr>
</thead>
<tbody>
<tr>
<td>Food &amp; Drugs</td>
<td>9%</td>
<td>8%</td>
</tr>
<tr>
<td>Fuel &amp; Service Stations</td>
<td>-31%</td>
<td>-29%</td>
</tr>
<tr>
<td>General Consumer Goods</td>
<td>14%</td>
<td>3%</td>
</tr>
<tr>
<td>Restaurants &amp; Hotels</td>
<td>33%</td>
<td>29%</td>
</tr>
</tbody>
</table>
Figure 1 | National City, CA - Population Density and Retail Clustering

Pop Density
- Less than 200
- 200 to 1,500
- 1,500 to 3,500
- 3,500 to 7,000
- 7,000 or more

AggData Locations
- General Merchandise
- Retail
- Markets
Retail & Restaurant Performance

• Sampled 46 National & Regional Firms

• 38 (83%) performed above the statewide average for their respective company
Questions

ECONSolutionsbyHdL.com
Bfoster@hdlcompanies.com
Craft Beer
Craft Beer

- Conditional Use Permit historically required
- Changing industry in the region
- Craft Beer Ordinance
- Wine & Distilled Spirits
- New “By Right” process
- Mixed-Use & Industrial Zones
Zoning
Mixed-Use
Zoning

Industrial
Downtown Specific Plan
Updates

• Height & FAR
• Parking Management
• Streamlined Process
Process

- Level 1 – Ministerial
- Level 2 – Discretionary
- Level 3 - Amendment
THANK YOU

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HOUSING & ECONOMIC DEVELOPMENT
TOGETHER WE CAN PROGRAMS:

- Adopt-a-Place;
- Activate the Right of Way;
- Signage & Façade Improvement Program
CREATING A CLEANER, HEALTHIER, SAFER...
MORE ECONOMICALLY VIBRANT AND BEAUTIFUL COMMUNITY...
FOR US ALL.
IDENTIFYING OUR PROGRAMS
Those who reside and work in the City of National City desire an environment that is clean, safe and attractive. Through the Adopt-a-Place Program individuals and organizations in the City of National City can take an active role that will help and contribute to the beautification of parks, streets, gateways and public spaces. The program mission is to increase awareness of our many public spaces & parks, encourage & recognize volunteer contributions and build community pride.
General Criteria

Adopt-A-Place Program

1. Identify an area no less than 1/2 a mile long from the “Preferred Areas” list or suggest your own area to adopt

2. Organize quarterly cleanups

3. Meet with City staff to check out/in cleaning supplies and a quick cleanup workshop

4. Receive an Adopt-a-Place sign or banner after your first clean up. Your recognition signage will be publicly displayed for up to one year.
Groups work directly with the Public Works and Housing and Economic Development Departments
Program Recognition
Street Banners, Pole Signs, Window Decals, Bumper Stickers
The purpose of the Signage and Façade Improvement Program (SFIP) is to assist businesses in signage compliance and improve the appearance of existing businesses. The SFIP mission is to stimulate revitalization and private sector capital investment by proactively addressing deteriorating property conditions and encouraging improvements which increase our City’s overall economic vitality.
Eligible Improvements for Signage & Façade Improvement Program

1. Exterior Signs
2. Awnings and canopies
3. Exterior painting, cleaning, façade repair
4. Plants and landscaping
5. Doors and windows
6. Façade and display window lighting
7. Fascia, tile, trim, metal work and other decorative elements
8. Demolition of obsolete structures
9. Addition of a patio or outdoor space
### Program Incentives for Signage & Façade Improvement Program

<table>
<thead>
<tr>
<th>Property Type</th>
<th>Minimum Total Project Cost</th>
<th>Applicant Match Requirement</th>
<th>Maximum Reimbursement</th>
</tr>
</thead>
<tbody>
<tr>
<td>Standard Incentive</td>
<td>$1,000.</td>
<td>≥ 50%</td>
<td>$10,000.</td>
</tr>
<tr>
<td>Multi-Tenant Property Owner Incentive</td>
<td>$2,500.</td>
<td>≥ 50%</td>
<td>$15,000.</td>
</tr>
</tbody>
</table>

**Standard Incentive:** All projects for a single small business may be considered for the standard incentive and may be awarded one-half of the eligible costs of the project up to a maximum of $10,000.

**Multi-Tenant Property Owner Incentive:** A National City property owner leasing to two or more street level and street-facing small business tenants may be awarded one-half of the eligible construction costs up to a maximum of $15,000. Each qualified tenant must have their own street facing entrance and be visible from the public right of way.
The program reimburses owners of commercial buildings and businesses up to 50% of the total cost of eligible improvements. To assist businesses in signage compliance and improve the appearance of existing businesses and their overall vitality.
The purpose of the Activate the Public Right of Way (A.R.O.W.) is to beautify, activate and promote our City by working with the business community to enhance portions of the public right-of-way (PROW). The Program will create spaces that cultivate community and culture, increase property values for residents of our City and spur economic growth and income to local merchants by encouraging pedestrian traffic. The program’s two areas of focus are outdoor display areas and outdoor recreational areas.
Activate the Right of Way
Programs Areas of Focus

Outdoor Display Standards: Only those businesses fronting on the PROW and located on the first floor may participate in this Program. Community Business Organizations may adopt a place in the PROW that has been identified by the City as a desired location for enhancement. Enhancements may be placed only in the PROW directly in front of the Business’s storefront or in one of the city’s identified areas of enhancement. Enhancements that do not comply with the General Requirements, Standards, and Conditions of this Program are not allowed.
Activate the Right of Way
Programs Areas of Focus

Outdoor Dining Area Standards:
Only those restaurants fronting on the PROW and located on the first floor may participate in this Program.

Community Business Organizations may adopt a place in the PROW that has been identified by the City as a desired location for Enhancements. Enhancements that do not comply with the General Requirements, Standards, and Conditions of this Program are not allowed.
Creating spaces that cultivate community and culture, increase property values for residents of the City of National City and spur economic growth and income to local merchants by encouraging greater pedestrian traffic.

ACTIVATE THE RIGHT OF WAY
THANK YOU

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