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Staff Report

ITEM SS-1

To: Lemoore City Council
From: Jeff Laws, City Manager
Date: August 26, 2014 **Meeting Date:** September 2, 2014
Subject: Economic Development Goal Setting

Discussion

During the last City Council meeting, Council heard arguments in favor of industrial and retail development. Council determined that before entering into any contracts, it would be in the best interest of the City to meet and determine the City's goals with regard to economic development.

All new development, whether commercial, industrial, or housing, benefits the community by bringing jobs and increased property tax revenue. As pointed out during the meeting, jobs are key in being able to support retail development. If people do not have jobs, then there's not much money to spend locally. Development anywhere in the County benefits all Kings County communities through the payment of property taxes. The percentage each community receives is based on their respective assessed value. Lemoore's factor was .009543 for fiscal year 2013-14 and is estimated at .009847 for the 2014-15 fiscal year. The following is an example of property tax generated to the City on a new construction project of \$1,000,000:

Assessed Value	1% Property Tax Paid to County	City Factor
\$1,000,000	\$10,000	.009543

Property Tax Revenue to the City: \$95.43

Currently, any new development in our Lemoore Redevelopment Project Areas increases the amount of tax increment generated to the former Lemoore Redevelopment Agency, which is used to pay off existing debt of the Agency. The percentage the City of Lemoore receives will increase in 2034 after all of the Lemoore Redevelopment Agency's debt is fully paid.

Retail development brings not only jobs and property tax revenue, but it also generates sales tax revenue to the City. The following is an example of the amount of sales tax generated on \$1,000,000 worth of taxable retail sales:

Retail Sales	City
\$1,000,000	.75 Percent

Sales tax revenue to the City:	<u>\$7,500.00</u>
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Since all new construction generates property tax revenue, it is important to show the additional revenue generated to the City when the project is a sales tax producing entity. Sales tax revenue accrues to the City's General Fund and the General Fund is used to pay for certain City services and salaries for City employees. As you can see, on a \$1,000,000 investment, the City receives approximately \$95 in property tax revenue. If the same development was a retail project with \$1,000,000 in taxable sales, the City would receive the \$95 property tax, plus \$7,500 in sales tax revenue.

It was noted that jobs are needed before retail can be developed. In 2008, the Redevelopment Agency hired Buxton Company to perform a Retail Attraction Study. In 2009, a Retail Site Assessment (the "Report") was complete, which determined the amount of dollars being earned by Lemoore residents and how many of those dollars were being spent outside of the community. The Report is attached and shows the amount of retail leakage (dollars being spent outside Lemoore) and surplus (attracting shoppers from outside the community to shop in Lemoore). The numbers show a significant amount of leakage to other communities, which is attributed to Lemoore's lack of retail development. At that time, approximately \$200,000,000 of monies in Lemoore was spent outside of the community. Therefore, Lemoore residents have money to spend, but are spending it in other communities.

The City has had a long standing relationship with Kings County Economic Development Corporation. The firm specializes in industrial development, business retention and Enterprise Zone services.

The City of Lemoore currently has a contractual relationship with The CrisCom Company to pursue infrastructure funding for the Lemoore Police Department. The firm specializes in governmental affairs, business development, and public relations. Additionally, CrisCom boasts of having relationships with many developers in the retail sector.

Budget Impact

None at this time.

Recommendation

Council should discuss economic development and determine its goals for the community.

Detailed Description of the Sales & Use Tax Rate

The [tax rate \(/sutax/pam71.htm\)](/sutax/pam71.htm) in your area may be higher than 7.50% depending on the district taxes that apply there.

Components of the Statewide 7.50 percent Sales and Use Tax Rate:

Rate	Jurisdiction	Purpose	Authority
3.6875%	State	Goes to State's General Fund	Revenue and Taxation Code Sections 6051, 6201
0.25%	State	Goes to State's General Fund	Revenue and Taxation Code Sections 6051.3, 6201.3 (Inoperative 1/1/01 – 12/31/01)
0.25%	State	Goes to State's Fiscal Recovery Fund, to pay off Economic Recovery Bonds (2004)	Revenue and Taxation Code Sections 6051.5, 6201.5 (Operative 7/1/04)
0.50%	State	Goes to Local Public Safety Fund to support local criminal justice activities (1993)	Section 35, Article XIII, State Constitution
0.25%	State	Goes to State's Education Protection Account to support school districts, county offices of education, charter schools, and community college districts.	Section 36, Article XIII, State Constitution (Operative 1/1/13 to 12/31/16)
0.50%	State	Goes to Local Revenue Fund to support local health and social services programs (1991 Realignment)	Revenue and Taxation Code Sections 6051.2, 6201.2
1.0625%	State	Goes to Local Revenue Fund 2011	Revenue and Taxation Code Sections 6051.15 and 6201.15
1.00%	Local	0.25% Goes to county transportation funds 0.75% Goes to city or county operations	Revenue and Taxation Code Section 7203.1 (Operative 7/1/04)
Total:			
7.50%	State/Local	Total Statewide Base Sales and Use Tax Rate	



**Retail Site
Assessment**
February 2009

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Selecting Lemoore's Retail Site

To begin the CommunityID process, the City of Lemoore selected four sites and the city center to be analyzed for possible retail development or revitalization. The locations of the four sites are shown on the opposite page.

The next task for the sponsoring organization is to select one of the four sites for a more detailed analysis and determination of retail firms that will best match the consumers in Lemoore's trade area.

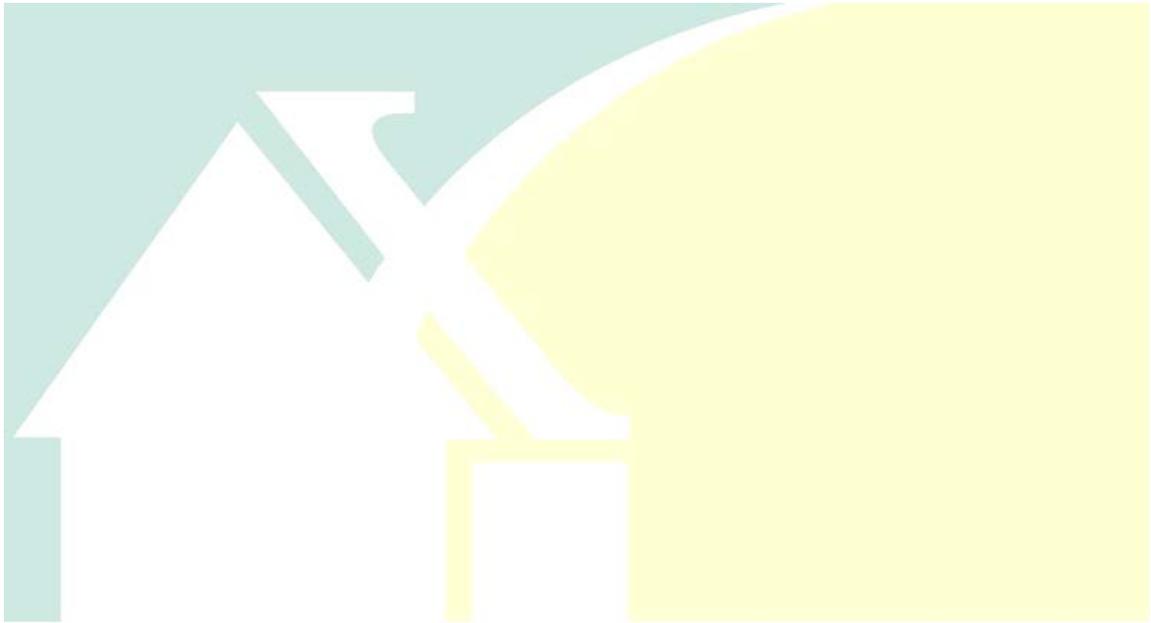
To aid in the decision-making process to select the best site, Buxton conducted the following analyses:

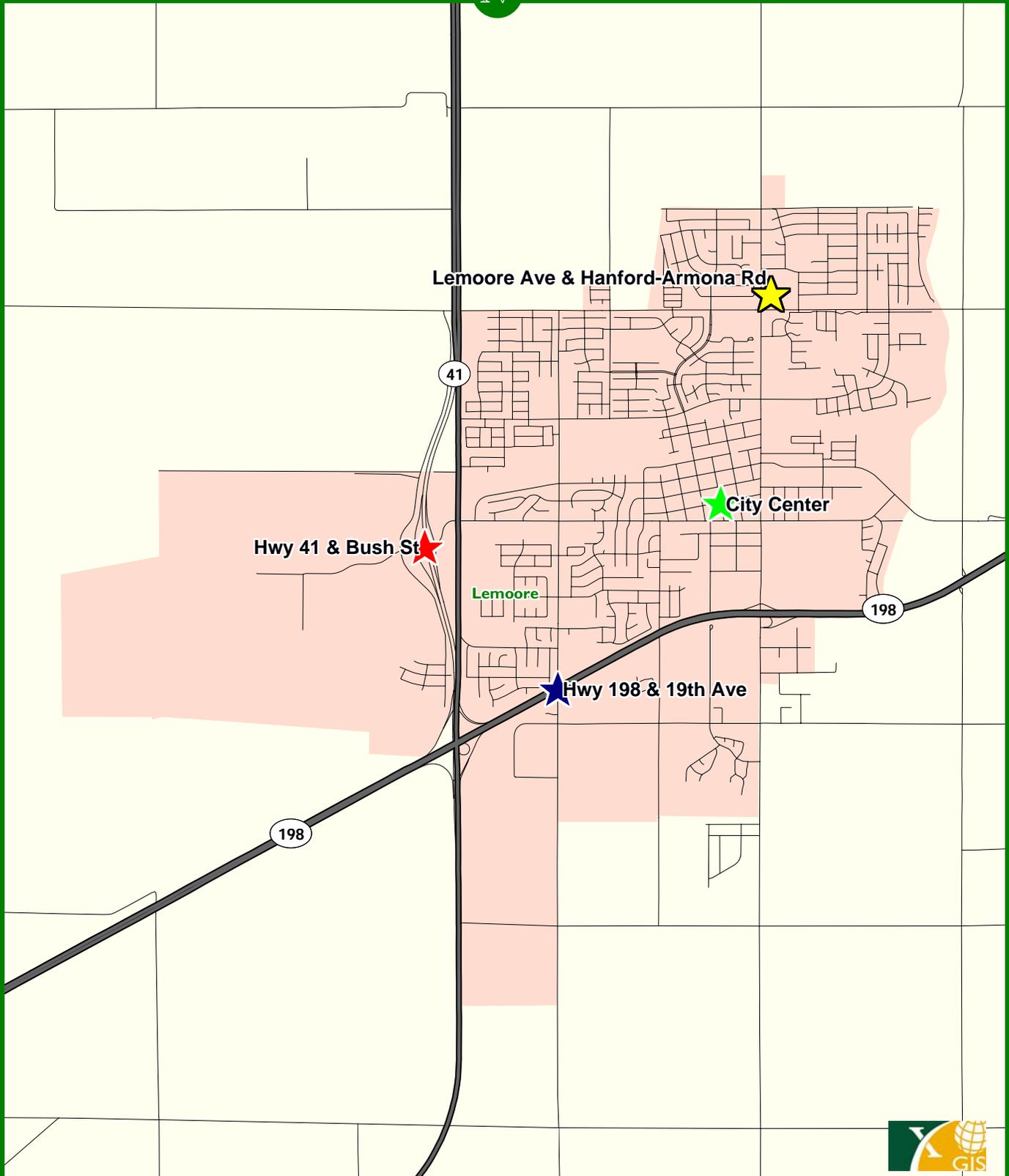
- A primary drive-time trade area was delineated for each site
- The customers in each trade area were segmented according to buying habits and lifestyles
- A profile of Lemoore's customers within each of the trade areas was developed
- The surplus and leakage for more than 36 product types and 74 store types was determined for each potential trade area

The purpose of these analyses is to develop Lemoore's Customer Profile. The Customer Profile is a snapshot of the customers that reside in Lemoore's trade area. Even though these consumers are complex and diverse, Buxton is able to capture and catalogue the extent to which potential demand for a retailer's goods and services are being met within the trade area.

By overlaying Lemoore's Customer Profile with over 4,500 retail matching profiles in Buxton's proprietary database, we are able to identify major categories of retail that are candidates for location in Lemoore. This matching provides the basis for determining Lemoore's viability to attract retailers and restaurants and forms the basis for Buxton's recommendations and conclusions.

With this analysis and Buxton's recommendations, Lemoore can make a more informed decision about investments in infrastructure and can focus resources on areas of higher retail development potential.





Lemoore, California: Overview

Shopping Centers

GLA in thousands



City Limits

Site 1

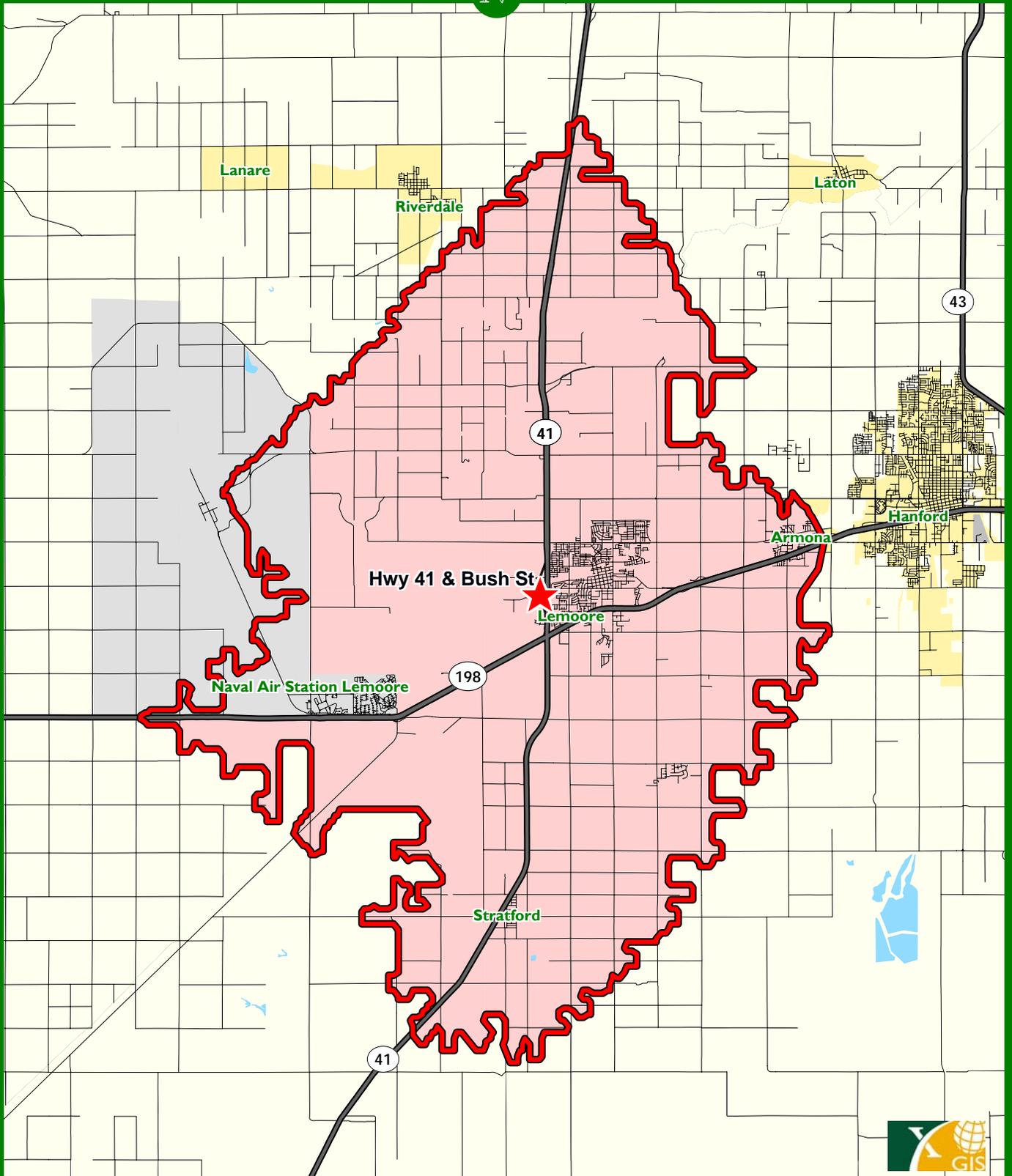
Site 2

Site 3

Site 4

Miles





Lemoore, California: Trade Area



Shopping Centers

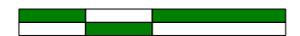
GLA in thousands



 13 Minute Drive Time

 Site I

Miles



0 2 4

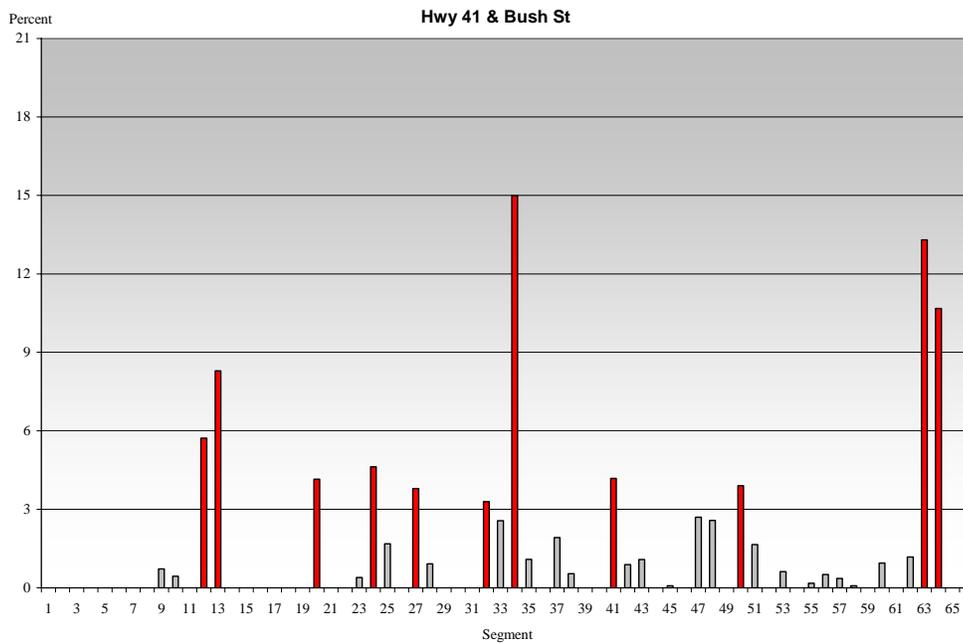
Site I Analysis: Hwy 41 & Bush St

Drive-Time Trade Area

The map on the opposite page depicts the primary trade area for Site I. The primary trade area consists of a thirteen-minute polygon, determined by Buxton's proprietary drive-time technology.

Psychographics

The psychographic profile of the households within a thirteen-minute drive-time of Site I is presented below.



Source: Claritas, Inc. PRIZM® NE, © 2008

Dominant Segments

A segment that represents at least three percent of a trade area is a dominant segment. Following is a description of the dominant segments for Site I.

Dominant Segments	Description	Households	% of All Households
12	BRITE LITES, LI'L CITY	709	5.72%
13	UPWARD BOUND	1,028	8.29%
20	FAST-TRACK FAMILIES	515	4.15%
24	UP-AND-COMERS	573	4.62%
27	MIDDLEBURG MANAGERS	470	3.79%
32	NEW HOMESTEADERS	408	3.29%
34	WHITE PICKET FENCES	1,859	14.99%
41	SUNSET CITY BLUES	518	4.18%
50	KID COUNTRY, USA	484	3.90%
63	FAMILY THRIFTS	1,649	13.30%
64	BEDROCK AMERICA	1,323	10.67%

Source: Claritas, Inc. PRIZM® NE, © 2008

Site I Analysis (continued)

Leakage Analysis

The following table represents an overview by store type of the leakage or surplus within the studied trade area. This is represented by an index with 1.0 being the baseline. A leakage is reflected by an index less than 1.0 and a surplus is reflected by an index greater than 1.0. Please see Appendix A for detailed demand and actual sales by category.



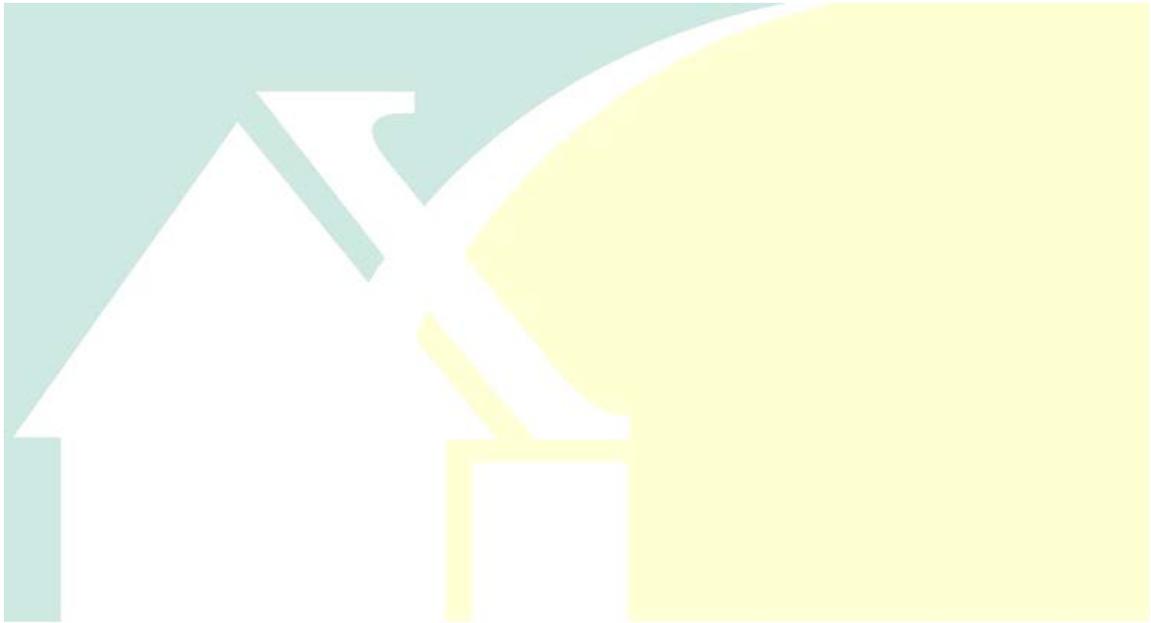
*GAFO refers to discount retailers that typically include the following departments: general merchandise; clothing and clothing accessories; furniture and home furnishings; electronics and appliances; sporting goods, hobby, books and music; and office supplies

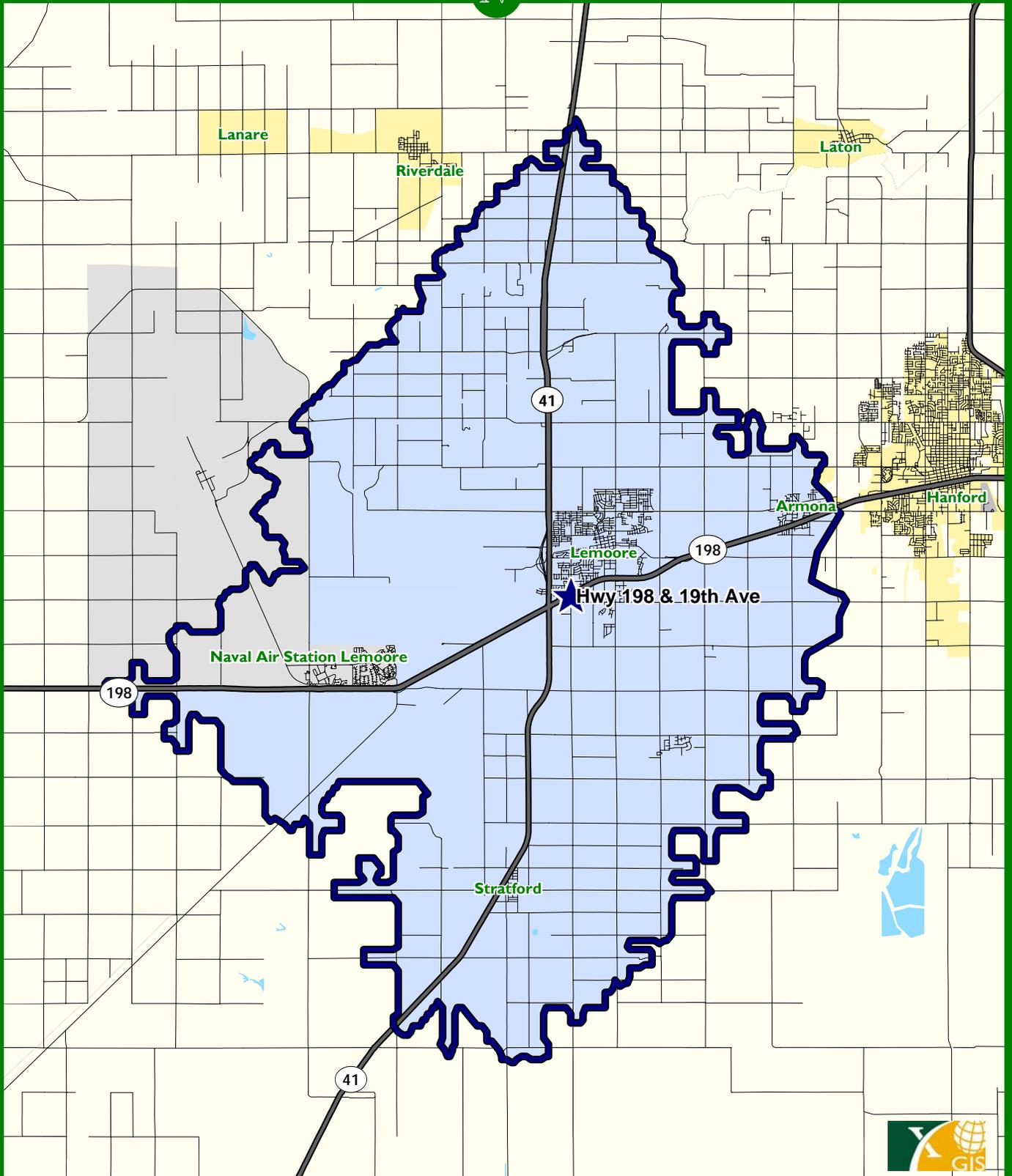
Source: Claritas, Inc, RETAIL MARKET POWER, © 2008

The following table presents the trade potential variables for Site I:

Trade Potential Variables	Site I
Estimated Household Count	12,398
Number of Households in Dominant Segments	9,536
Traffic Count	9,356
Total Demand	\$550,139,972
Total Supply	\$346,309,780
Leakage/Surplus	(\$203,830,192)

Source: Claritas, Inc, RETAIL MARKET POWER, PRIZM® NE, © 2008





Lemoore, California: Trade Area

Shopping Centers

GLA in thousands



1000+



500 to 1000

13 Minute Drive Time



Site 2

Miles



0 2 4



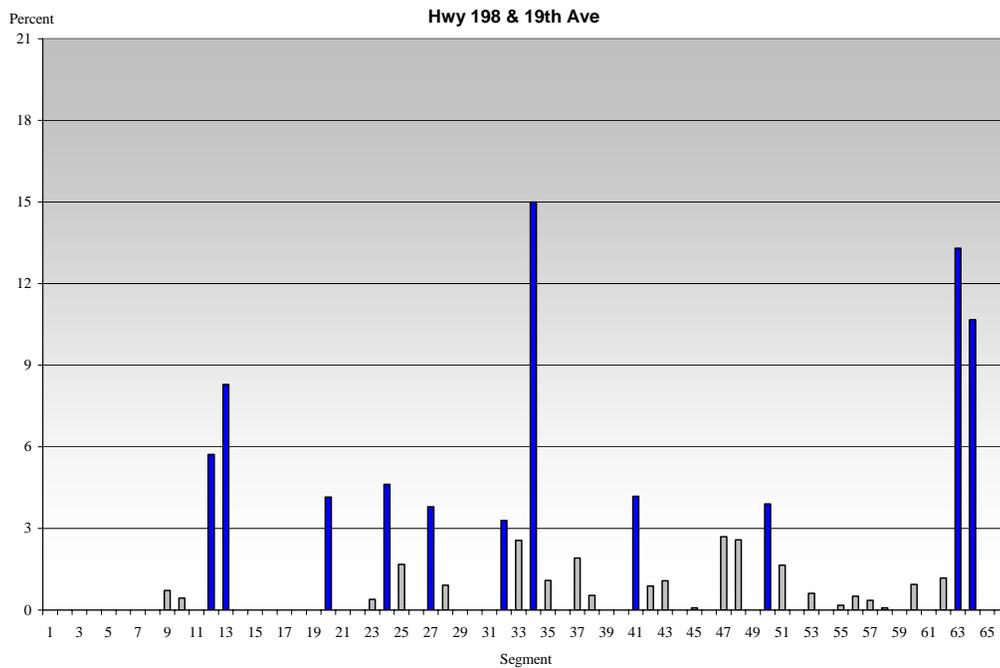
Site 2 Analysis: Hwy 198 & 19th Ave

Drive-Time Trade Area

The map on the opposite page depicts the primary trade area for Site 2. The primary trade area consists of a thirteen-minute polygon, determined by Buxton's proprietary drive-time technology.

Psychographics

The psychographic profile of the households within a thirteen-minute drive-time of Site 2 is presented below.



Source: Claritas, Inc, PRIZM[®] NE, © 2008

Dominant Segments

A segment that represents at least three percent of a trade area is a dominant segment. Following is a description of the dominant segments for Site 2.

Dominant Segments	Description	Households	% of All Households
12	BRITE LITES, LI'L CITY	709	5.72%
13	UPWARD BOUND	1,028	8.29%
20	FAST-TRACK FAMILIES	515	4.15%
24	UP-AND-COMERS	573	4.62%
27	MIDDLEBURG MANAGERS	470	3.79%
32	NEW HOMESTEADERS	408	3.29%
34	WHITE PICKET FENCES	1,859	14.99%
41	SUNSET CITY BLUES	518	4.18%
50	KID COUNTRY, USA	484	3.90%
63	FAMILY THRIFTS	1,649	13.30%
64	BEDROCK AMERICA	1,323	10.67%

Source: Claritas, Inc, PRIZM[®] NE, © 2008

Site 2 Analysis (continued)

Leakage Analysis

The following table represents an overview by store type of the leakage or surplus within the studied trade area. This is represented by an index with 1.0 being the baseline. A leakage is reflected by an index less than 1.0 and a surplus is reflected by an index greater than 1.0. Please see Appendix A for detailed demand and actual sales by category.



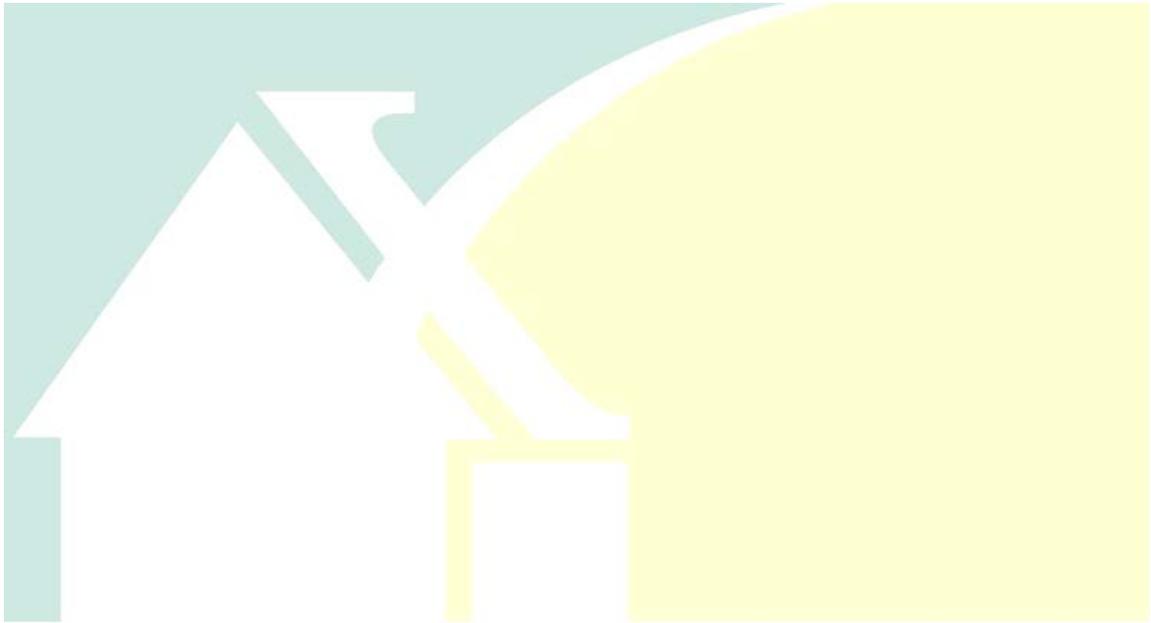
*GAFO refers to discount retailers that typically include the following departments: general merchandise; clothing and clothing accessories; furniture and home furnishings; electronics and appliances; sporting goods, hobby, books and music; and office supplies

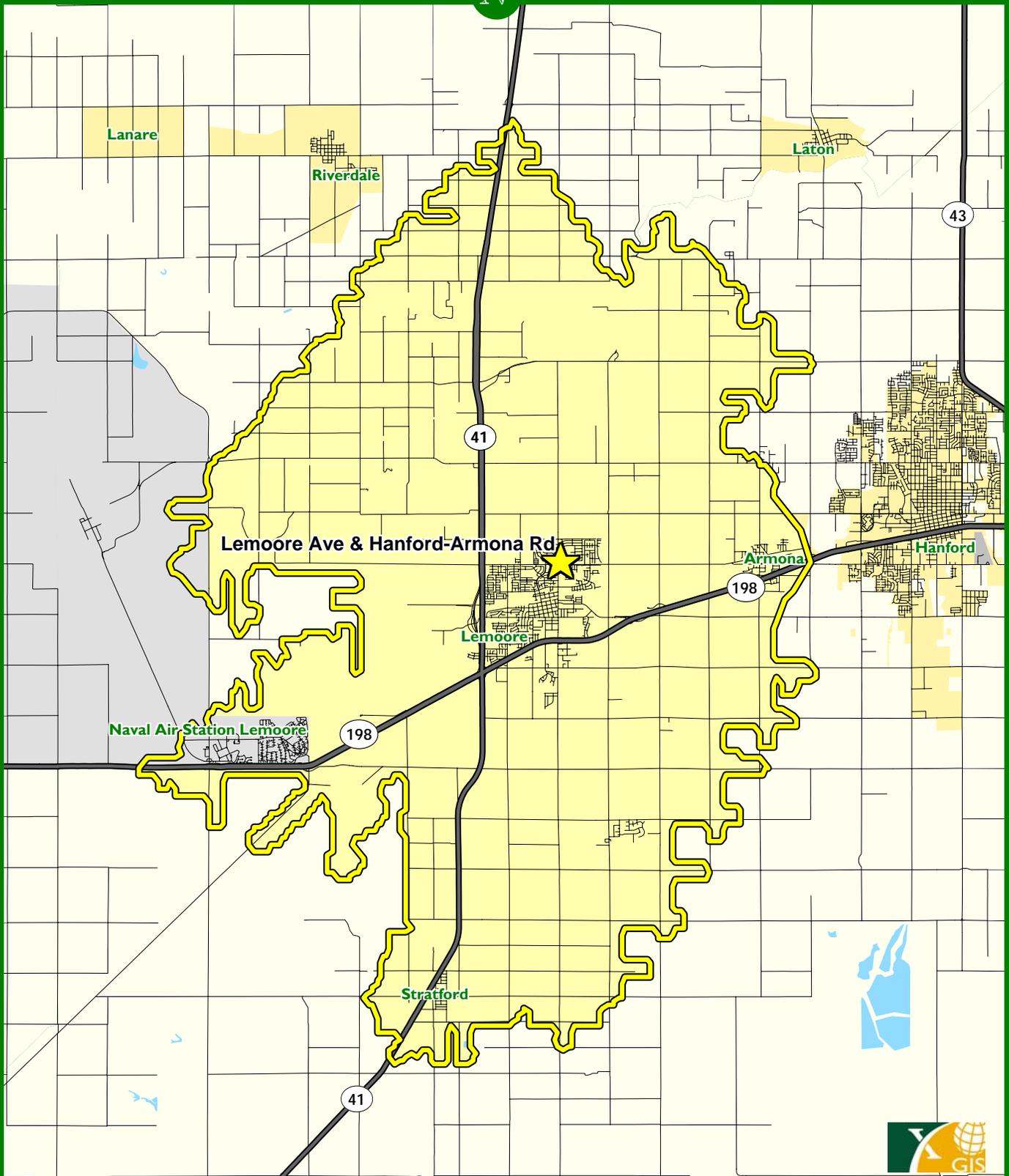
Source: Claritas, Inc, RETAIL MARKET POWER, © 2008

The following table presents the trade potential variables for Site 2:

Trade Potential Variables	Site 2
Estimated Household Count	12,398
Number of Households in Dominant Segments	9,536
Traffic Count	16,141
Total Demand	\$546,181,266
Total Supply	\$347,048,855
Leakage/Surplus	(\$199,132,411)

Source: Claritas, Inc, RETAIL MARKET POWER, PRIZM® NE, © 2008





Lemoore, California: Trade Area

Shopping Centers

GLA in thousands



 13 Minute Drive Time

 Site 3



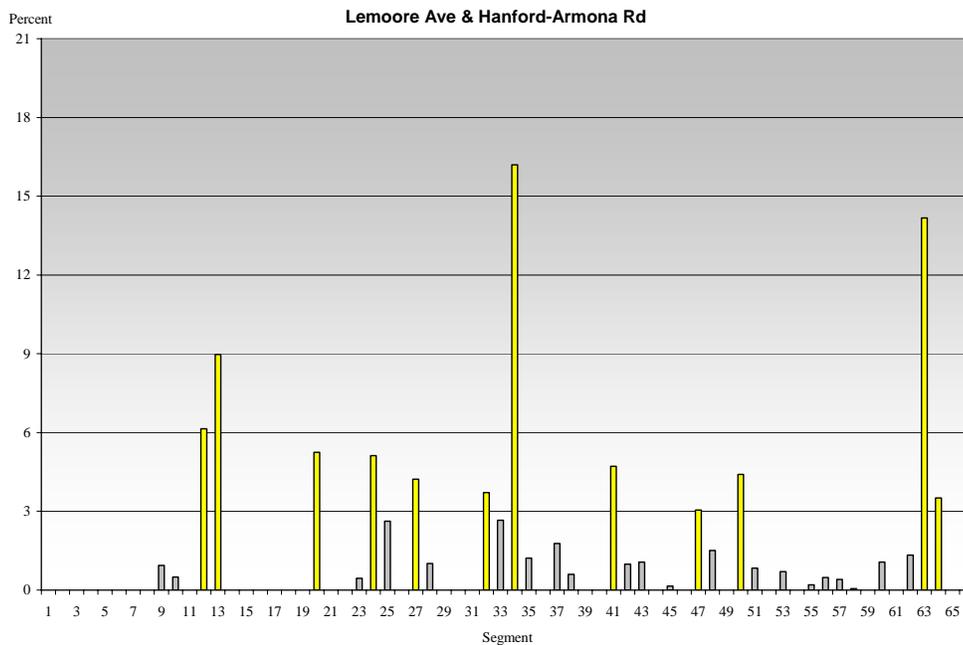
Site 3 Analysis: 18th Ave & Hanford-Armona Rd

Drive-Time Trade Area

The map on the opposite page depicts the primary trade area for Site 3. The primary trade area consists of a thirteen-minute polygon, determined by Buxton's proprietary drive-time technology.

Psychographics

The psychographic profile of the households within a thirteen-minute drive-time of Site 3 is presented below.



Source: Claritas, Inc. PRIZM[®] NE, © 2008

Dominant Segments

A segment that represents at least three percent of a trade area is a dominant segment. Following is a description of the dominant segments for Site 3.

Dominant Segments	Description	Households	% of All Households
12	BRITE LITES, LI'L CITY	675	6.14%
13	UPWARD BOUND	986	8.98%
20	FAST-TRACK FAMILIES	576	5.24%
24	UP-AND-COMERS	562	5.12%
27	MIDDLEBURG MANAGERS	464	4.22%
32	NEW HOMESTEADERS	408	3.71%
34	WHITE PICKET FENCES	1,779	16.19%
41	SUNSET CITY BLUES	518	4.72%
47	CITY STARTUPS	335	3.05%
50	KID COUNTRY, USA	484	4.41%
63	FAMILY THRIFTS	1,557	14.17%
64	BEDROCK AMERICA	385	3.50%

Source: Claritas, Inc. PRIZM[®] NE, © 2008

Site 3 Analysis (continued)

Leakage Analysis

The following table represents an overview by store type of the leakage or surplus within the studied trade area. This is represented by an index with 1.0 being the baseline. A leakage is reflected by an index less than 1.0 and a surplus is reflected by an index greater than 1.0. Please see Appendix A for detailed demand and actual sales by category.



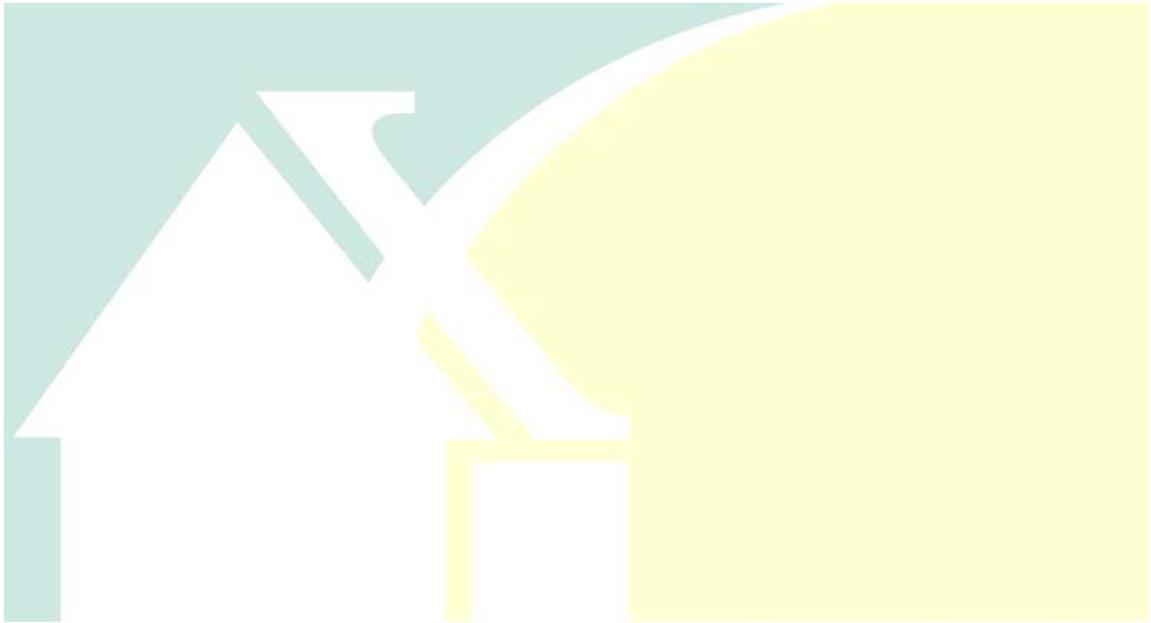
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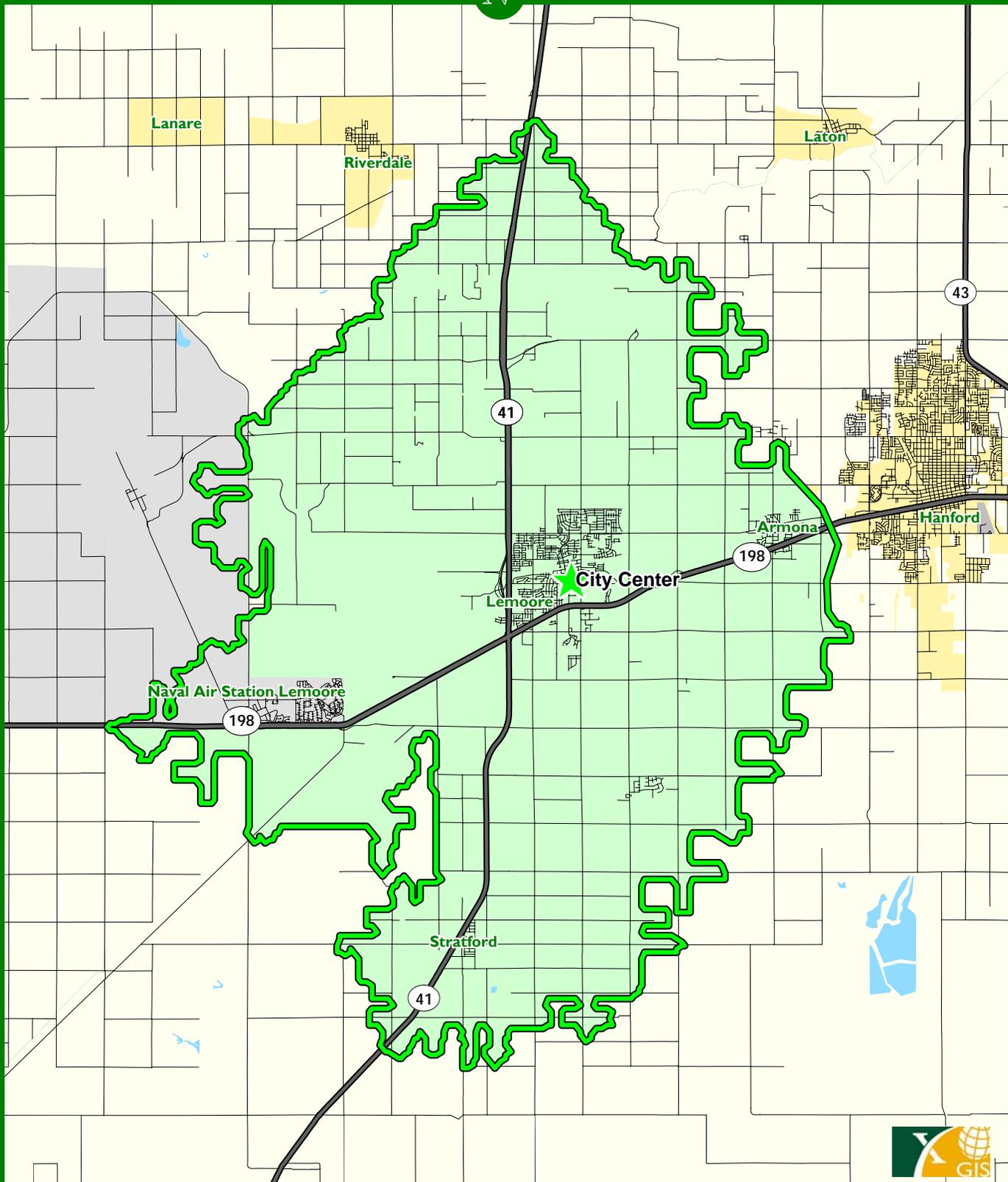
Source: Claritas, Inc, RETAIL MARKET POWER, © 2008

The following table presents the trade potential variables for Site 3:

Trade Potential Variables	Site 3
Estimated Household Count	10,986
Number of Households in Dominant Segments	8,729
Traffic Count	N/A
Total Demand	\$552,358,735
Total Supply	\$346,611,953
Leakage/Surplus	(\$205,746,782)

Source: Claritas, Inc, RETAIL MARKET POWER, PRIZM® NE, © 2008





Lemoore, California: Trade Area

Shopping Centers

GLA in thousands



 13 Minute Drive Time

 Site 4



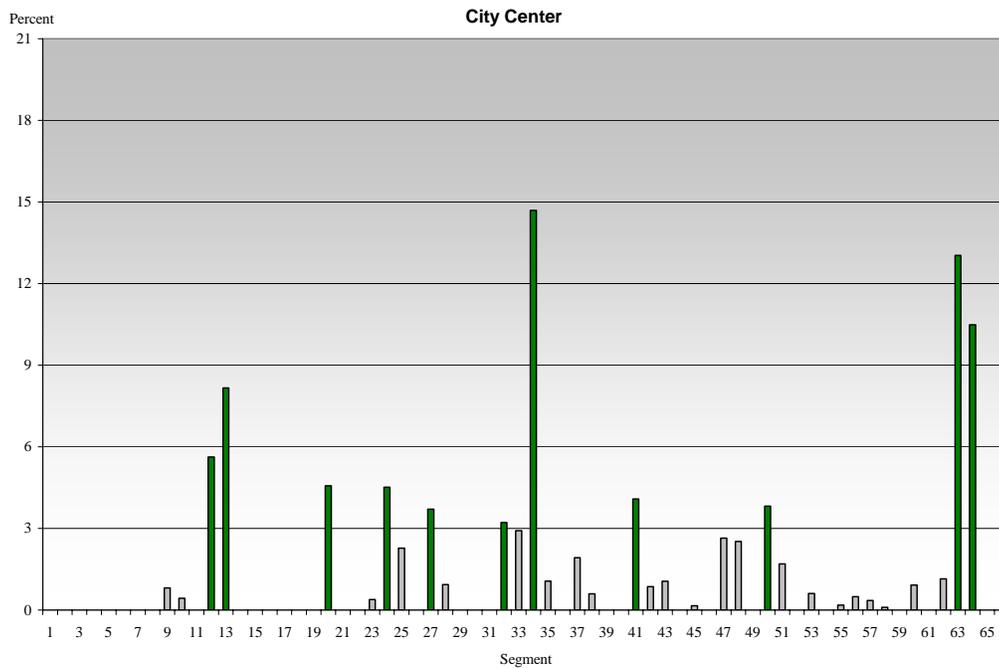
Site 4 Analysis: City Center

Drive-Time Trade Area

The map on the opposite page depicts the primary trade area for Site 4. The primary trade area consists of a thirteen-minute polygon, determined by Buxton's proprietary drive-time technology.

Psychographics

The psychographic profile of the households within a thirteen-minute drive-time of Site 4 is presented below.



Source: Claritas, Inc, PRIZM[®] NE, © 2008

Dominant Segments

A segment that represents at least three percent of a trade area is a dominant segment. Following is a description of the dominant segments for Site 4.

Dominant Segments	Description	Households	% of All Households
12	BRITE LITES, LI'L CITY	713	5.62%
13	UPWARD BOUND	1,035	8.16%
20	FAST-TRACK FAMILIES	579	4.57%
24	UP-AND-COMERS	573	4.52%
27	MIDDLEBURG MANAGERS	470	3.71%
32	NEW HOMESTEADERS	408	3.22%
34	WHITE PICKET FENCES	1,862	14.69%
41	SUNSET CITY BLUES	518	4.09%
50	KID COUNTRY, USA	484	3.82%
63	FAMILY THRIFTS	1,652	13.03%
64	BEDROCK AMERICA	1,329	10.48%

Source: Claritas, Inc, PRIZM[®] NE, © 2008

Site 4 Analysis (continued)

Leakage Analysis

The following table represents an overview by store type of the leakage or surplus within the studied trade area. This is represented by an index with 1.0 being the baseline. A leakage is reflected by an index less than 1.0 and a surplus is reflected by an index greater than 1.0. Please see Appendix A for detailed demand and actual sales by category.



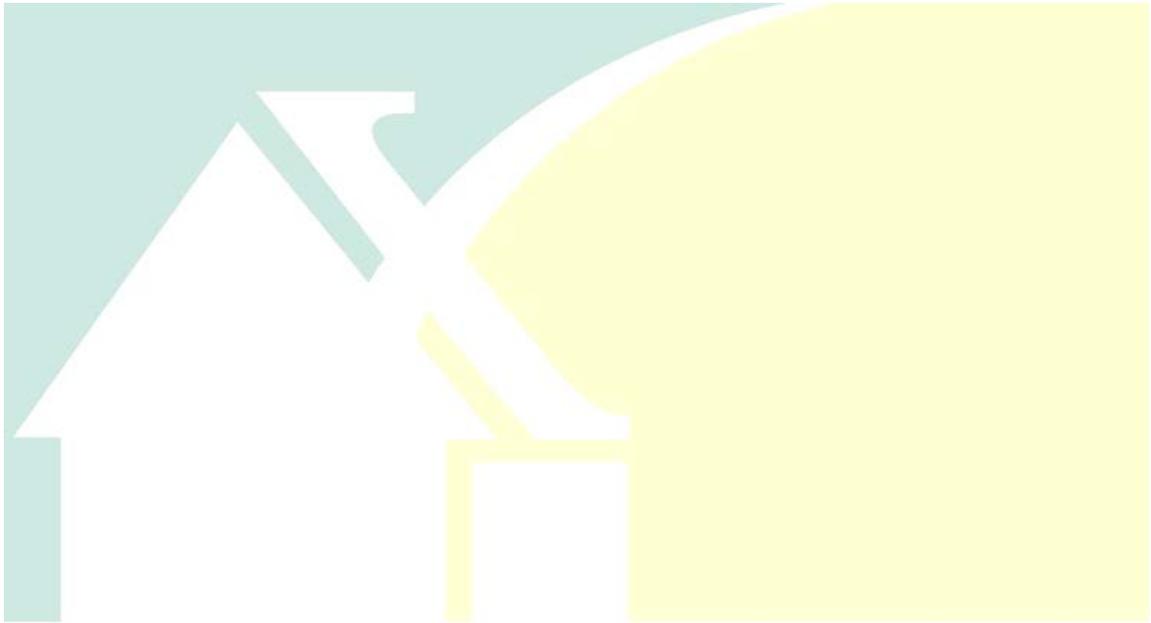
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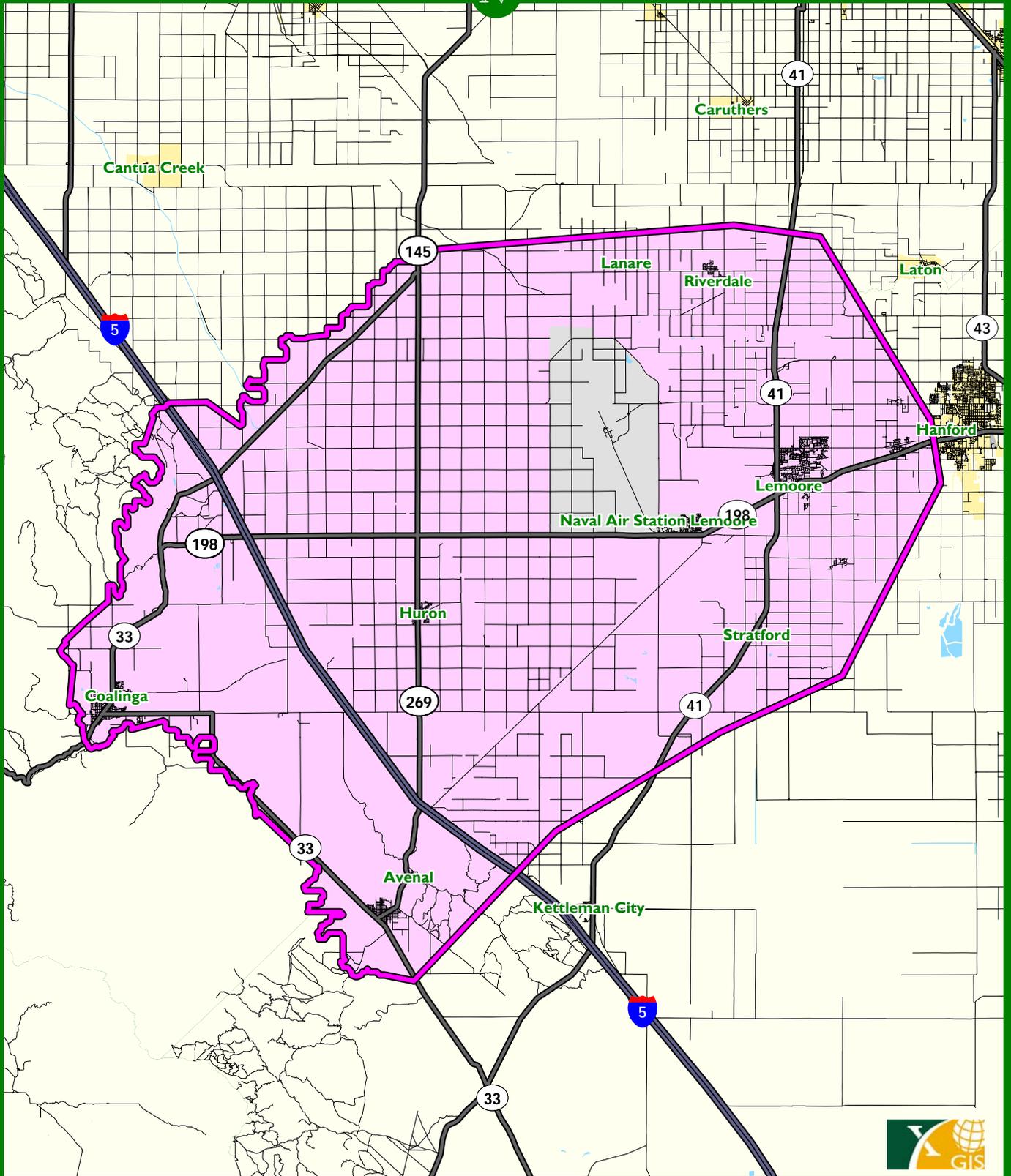
Source: Claritas, Inc, RETAIL MARKET POWER, © 2008

The following table presents the trade potential variables for Site 4:

Trade Potential Variables	Site 4
Estimated Household Count	12,678
Number of Households in Dominant Segments	9,623
Traffic Count	N/A
Total Demand	\$551,573,979
Total Supply	\$358,647,426
Leakage/Surplus	(\$192,926,553)

Source: Claritas, Inc, RETAIL MARKET POWER, PRIZM® NE, © 2008





Lemoore, California: Secondary Trade Area

Shopping Centers

GLA in thousands



Secondary Trade Area

Miles



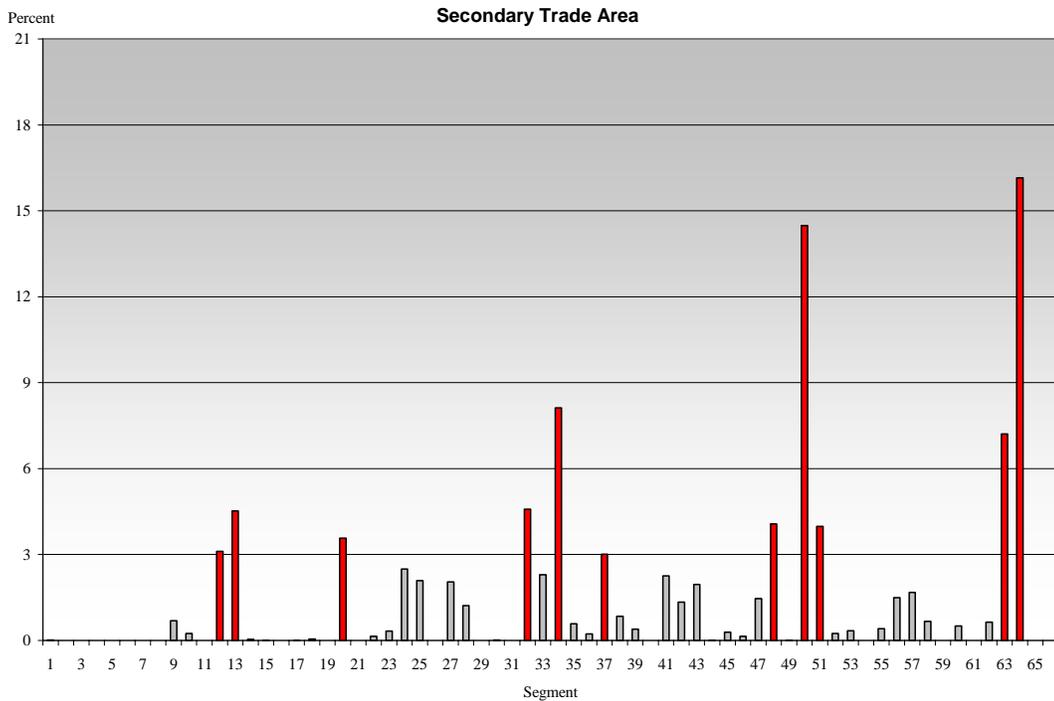
Secondary Trade Area Analysis:

Drive-Time Trade Area

The map on the opposite page depicts the secondary trade area.

Psychographics

The psychographic profile of the households within the secondary trade area is presented below.



Source: Claritas, Inc. PRIZM® NE, © 2008

Dominant Segments

A segment that represents at least three percent of a trade area is a dominant segment. Following is a description of the dominant segments for the secondary trade area.

Dominant Segments	Description	Households	% of All Households
12	BRITE LITES, LI'L CITY	714	3.11%
13	UPWARD BOUND	1,039	4.53%
20	FAST-TRACK FAMILIES	820	3.57%
32	NEW HOMESTEADERS	1,052	4.58%
34	WHITE PICKET FENCES	1,864	8.12%
37	MAYBERRY-VILLE	691	3.01%
48	YOUNG & RUSTIC	934	4.07%
50	KID COUNTRY, USA	3,325	14.49%
51	SHOTGUNS & PICKUPS	914	3.98%
63	FAMILY THRIFTS	1,654	7.21%
64	BEDROCK AMERICA	3,706	16.15%

Source: Claritas, Inc. PRIZM® NE, © 2008

Secondary Trade Area Analysis (continued)

Leakage Analysis

The following table represents an overview by store type of the leakage or surplus within the studied trade area. This is represented by an index with 1.0 being the baseline. A leakage is reflected by an index less than 1.0 and a surplus is reflected by an index greater than 1.0. Please see Appendix A for detailed demand and actual sales by category.



*GAFO refers to discount retailers that typically include the following departments: general merchandise; clothing and clothing accessories; furniture and home furnishings; electronics and appliances; sporting goods, hobby, books and music; and office supplies

Source: Claritas, Inc, RETAIL MARKET POWER, © 2008

The following table presents the trade potential variables for the secondary trade area:

Trade Potential Variables	Secondary Trade Area
Estimated Household Count	22,953
Number of Households in Dominant Segments	16,713
Traffic Count	N/A
Total Demand	\$942,884,744
Total Supply	\$690,671,658
Leakage/Surplus	(\$252,213,086)

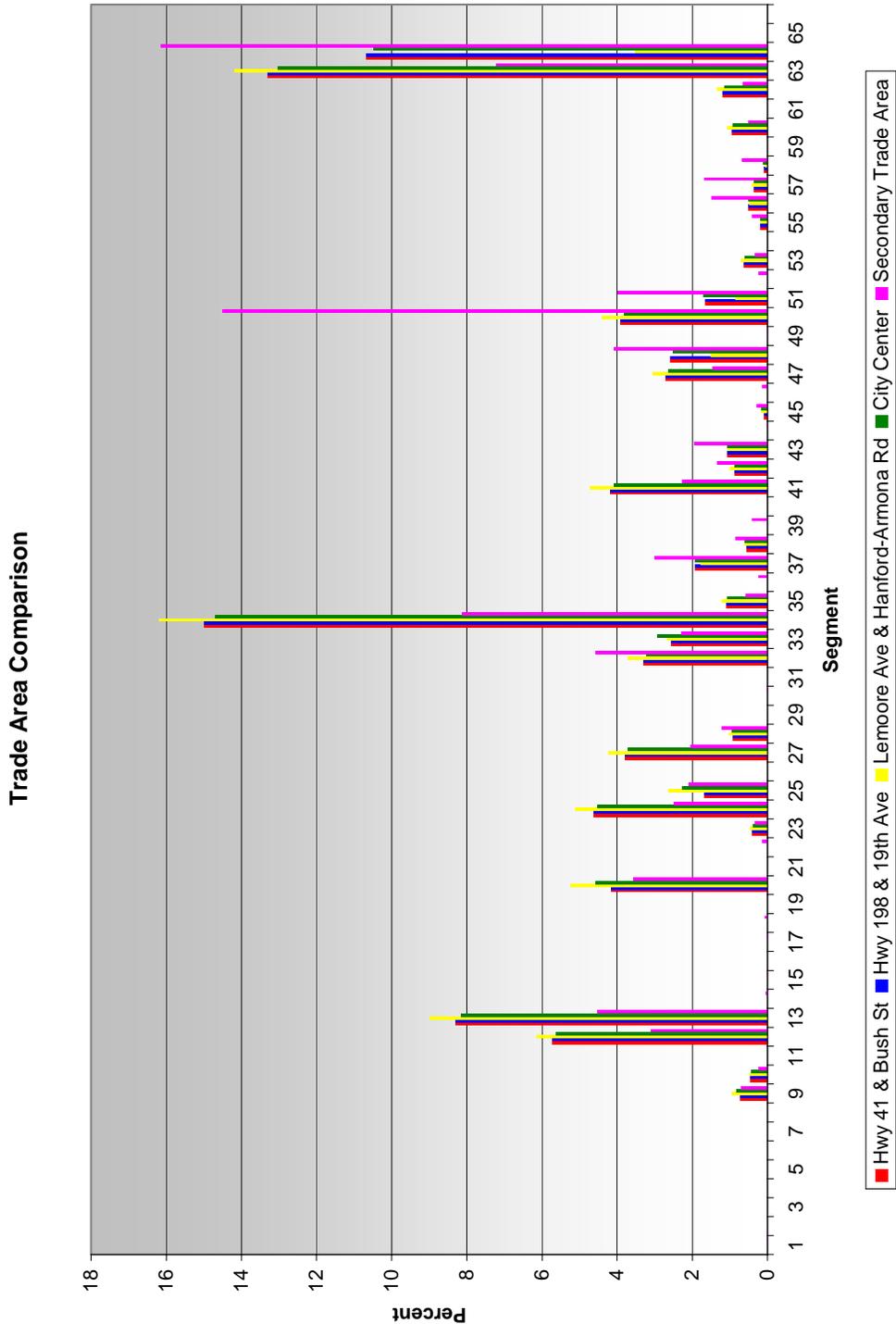
Source: Claritas, Inc, RETAIL MARKET POWER, PRIZM® NE, © 2008

Site Comparison

Trade Area Segmentation

This side by side comparison of the four trade areas shows the compositions and characteristics of the households to be very similar. This is not unusual and can be expected in an area with potential sites in close proximity.

Source: Claritas, Inc. PRIZM[®] NE, © 2008



Site Comparison (continued)

13- Minute Trade Area Statistics

Trade Potential Variables	Site 1	Site 2	Site 3	Site 4	Secondary Trade Area
Estimated Household Count	12,398	12,398	10,986	12,678	22,953
Number of Households in Dominant Segments	9,536	9,536	8,729	9,623	16,713
Traffic Count	9,356	16,141	N/A	N/A	N/A
Total Demand	\$550,139,972	\$546,181,266	\$552,358,735	\$551,573,979	\$942,884,744
Total Supply	\$346,309,780	\$347,048,855	\$346,611,953	\$358,647,426	\$690,671,658
Leakage/Surplus	(\$203,830,192)	(\$199,132,411)	(\$205,746,782)	(\$192,926,553)	(\$252,213,086)

Source: Claritas, Inc, RETAIL MARKET POWER, PRIZM® NE, © 2008

Brief Segment Descriptions

- 1 UPPER CRUST – The nation’s most exclusive address, Upper Crust is the wealthiest lifestyle in America—a haven for empty-nesting couples over 55 years old. No segment has a higher concentration of residents earning over \$200,000 a year or possessing a postgraduate degree, and none has a more opulent standard of living.
- 2 BLUE BLOOD ESTATES – Blue Blood Estates is a family portrait of suburban wealth, a place of million-dollar homes and manicured lawns, high-end cars and exclusive private clubs. The nation’s second-wealthiest lifestyle, it is characterized by married couples with children, college degrees, a significant percentage of Asian Americans and six-figure incomes earned by business executives, managers and professionals.
- 3 MOVERS & SHAKERS – Movers & Shakers is home to America’s up-and-coming business class: a wealthy suburban world of dual-income couples who are highly educated, typically between the ages of 35 and 54, often with children. Given its high percentage of executives and white-collar professionals, there is a decided business bent to this segment: Movers & Shakers rank number one for owning a small business and having a home office.
- 4 YOUNG DIGERATI – Young Digerati are the nation’s tech-savvy singles and couples living in fashionable neighborhoods on the urban fringe. Affluent, highly educated and ethnically mixed, Young Digerati communities are typically filled with trendy apartments and condos, fitness clubs and clothing boutiques, casual restaurants and all types of bars—from juice to coffee to microbrew.
- 5 COUNTRY SQUIRES – The wealthiest residents in exurban America live in Country Squires, an oasis for affluent Baby Boomers who have fled the city for the charms of small-town living. In their bucolic communities noted for their recently built homes on sprawling properties, the families of executives live in six-figure comfort. Country Squires enjoy country club sports like golf, tennis and swimming as well as skiing, boating and biking.
- 6 WINNER’S CIRCLE – Among the wealthy suburban lifestyles, Winner’s Circle is the youngest, a collection of mostly 25- to 34-year-old couples with large families in new-money subdivisions. Surrounding their homes are the signs of upscale living: recreational parks, golf courses and upscale malls. With a median income of nearly \$90,000, Winner’s Circle residents are big spenders who like to travel, ski, go out to eat, shop at clothing boutiques and take in a show.
- 7 MONEY & BRAINS – The residents of Money & Brains seem to have it all: high incomes, advanced degrees and sophisticated tastes to match their credentials. Many of these city dwellers—predominantly white with a high concentration of Asian Americans—are married couples with few children who live in fashionable homes on small, manicured lots.

Brief Segment Descriptions

- 8 EXECUTIVE SUITES – Executive Suites consists of upper-middle-class singles and couples typically living just beyond the nation’s beltways. Filled with significant numbers of Asian Americans and college graduates—both groups are represented at more than twice the national average—this segment is a haven for white-collar professionals drawn to comfortable homes and apartments within a manageable commute to downtown jobs, restaurants and entertainment.
- 9 BIG FISH, SMALL POND – Older, upper-class, college-educated professionals, the members of Big Fish, Small Pond are often among the leading citizens of their small-town communities. These upscale, empty-nesting couples enjoy the trappings of success, belonging to country clubs, maintaining large investment portfolios and spending freely on computer technology.
- 10 SECOND CITY ELITE – There’s money to be found in the nation’s smaller cities, and you’re most likely to find it in Second City Elite. The residents of these satellite cities tend to be prosperous executives who decorate their \$200,000 homes with multiple computers, large-screen TV sets and an impressive collection of wines. With more than half holding college degrees, Second City Elite residents enjoy cultural activities—from reading books to attending theater and dance productions.
- 11 GOD’S COUNTRY – When city dwellers and suburbanites began moving to the country in the 1970’s, God’s Country emerged as the most affluent of the nation’s exurban lifestyles. Today, wealthier communities exist in the hinterlands, but God’s Country remains a haven for upper-income couples in spacious homes. Typically college-educated Baby Boomers, these Americans try to maintain a balanced lifestyle between high-power jobs and laid-back leisure.
- 12 BRITE LITES, LI’L CITY – Not all of the America’s chic sophisticates live in major metros. Brite Lights, Li’l City is a group of well-off, middle-aged couples settled in the nation’s satellite cities. Residents of these typical double income, no kids households have college educations, well-paying business and professional careers and swank homes filled with the latest technology.
- 13 UPWARD BOUND – More than any other segment, Upward Bound appears to be the home of those legendary Soccer Moms and Dads. In these small satellite cities, upper-class families boast dual incomes, college degrees and new split-levels and colonials. Residents of Upward Bound tend to be kid-obsessed, with heavy purchases of computers, action figures, dolls, board games, bicycles and camping equipment.
- 14 NEW EMPTY NESTS – With their grown-up children recently out of the house, New Empty Nests is composed of upscale older Americans who pursue active—and activist—lifestyles. Nearly three-quarters of residents are over 65 years old, but they show no interest in a rest-home retirement. This is the top-ranked segment for all-inclusive travel packages; the favorite destination is Italy.

Brief Segment Descriptions

- 15 **POOLS & PATIOS** – Formed during the postwar Baby Boom, Pools & Patios has evolved from a segment of young suburban families to one for mature, empty-nesting couples. In these stable neighborhoods graced with backyard pools and patios—the highest proportion of homes were built in the 1960’s—residents work as white-collar managers and professionals, and are now at the top of their careers.
- 16 **BOHEMIAN MIX** – A collection of young, mobile urbanites, Bohemian Mix represents the nation’s most liberal lifestyles. Its residents are a progressive mix of young singles and couples, students and professionals, Hispanics, Asians, African-Americans and whites. In their funky row houses and apartments, Bohemian Mixers are the early adopters who are quick to check out the latest movie, nightclub, laptop and microbrew.
- 17 **BELTWAY BOOMERS** – The members of the postwar Baby Boom are all grown up. Today, these Americans are in their forties and fifties, and one segment of this huge cohort—college-educated, upper-middle-class and home-owning—is found in Beltway Boomers. Like many of their peers who married late, these Boomers are still raising children in comfortable suburban subdivisions, and they’re pursuing kid-centered lifestyles.
- 18 **KIDS & CUL-DE-SACS** – Upscale, suburban, married couples with children is the description of Kids & Cul-de-Sacs, an enviable lifestyle of large families in recently built subdivisions. With a high rate of Hispanic and Asian Americans, this segment is a refuge for college-educated, white-collar professionals with administrative jobs and upper-middle-class incomes. Their nexus of education, affluence and children translates into large outlays for child-centered products and services.
- 19 **HOME SWEET HOME** – Widely scattered across the nation’s suburbs, the residents of Home Sweet Home tend to be upper-middle-class married couples living in mid-sized homes with few children. The adults in the segment, mostly between the ages of 25 and 54, have gone to college and hold professional and white-collar jobs. With their upscale incomes and small families, these folks have fashioned comfortable lifestyles, filling their homes with toys, TV sets and pets.
- 20 **FAST-TRACK FAMILIES** – With their upper-middle-class incomes, numerous children and spacious homes, Fast-Track Families are in their prime acquisition years. These middle-aged parents have the disposable income and educated sensibility to want the best for their children. They buy the latest technology with impunity: new computers, DVD players, home theater systems and video games. They take advantage of their rustic locales by camping, boating and fishing.

Brief Segment Descriptions

- 21 **GRAY POWER** – The steady rise of older, healthier Americans over the past decade has produced one important by-product: middle-class, home-owning suburbanites who are aging in place rather than moving to retirement communities. A segment of older, mid-scale singles and couples who live in quiet comfort, Gray Power reflects this trend.
- 22 **YOUNG INFLUENTIALS** – Once known as the home of the nation’s yuppies, Young Influentials reflects the fading glow of acquisitive yuppiedom. Today, the segment is a common address for young, middle-class singles and couples who are more preoccupied with balancing work and leisure pursuits. Having recently left college dorms, they now live in apartment complexes surrounded by ball fields, health clubs and casual-dining restaurants.
- 23 **GREENBELT SPORTS** – A segment of middle-class exurban couples, Greenbelt Sports is known for its active lifestyle. Most of these middle-aged residents are married, college-educated and own new homes; about a third have children. And few segments have higher rates for pursuing outdoor activities such as skiing, canoeing, backpacking, boating and mountain biking.
- 24 **UP-AND-COMERS** – Up-and-Comers is a stopover for young, mid-scale singles before they marry, have families and establish more deskbound lifestyles. Found in second-tier cities, these mobile twenty-somethings include a disproportionate number of recent college graduates who are into athletic activities, the latest technology and nightlife entertainment.
- 25 **COUNTRY CASUALS** – There’s a laid-back atmosphere in Country Casuals, a collection of middle-aged, upper-middle-class households that have started to empty-nest. Workers here—and most households boast two earners—have well-paying blue- or white-collar jobs, or own small businesses. Today these Baby-Boom couples have the disposable income to enjoy traveling, owning timeshares and going out to eat.
- 26 **THE COSMOPOLITANS** – Educated, mid-scale and multi-ethnic, The Cosmopolitans are urbane couples in America’s fast-growing cities. Concentrated in a handful of metros—such as Las Vegas, Miami and Albuquerque—these households feature older home-owners, empty-nesters and college graduates. A vibrant social scene surrounds their older homes and apartments, and residents love the nightlife and enjoy leisure-intensive lifestyles.
- 27 **MIDDLEBURG MANAGERS** – Middleburg Managers arose when empty-nesters settled in satellite communities which offered a lower cost of living and more relaxed pace. Today segment residents tend to be middle-class and over 55 years old with solid managerial jobs and comfortable retirements. In their older homes, they enjoy reading, playing musical instruments, indoor gardening and refinishing furniture.

Brief Segment Descriptions

- 28 **TRADITIONAL TIMES** – Traditional Times is the kind of lifestyle where small-town couples nearing retirement are beginning to enjoy their first empty-nest years. Typically in their fifties and sixties, these middle-class Americans pursue a kind of granola-and-grits lifestyle. On their coffee tables are magazines with titles ranging from *Country Living* and *Country Home* to *Gourmet* and *Forbes*. But they're big travelers, especially in recreational vehicles and campers.
- 29 **AMERICAN DREAMS** – American Dreams is a living example of how ethnically diverse the nation has become: more than half the residents are Hispanic, Asian or African-American. In these multilingual neighborhoods—one in ten residents speaks a language other than English—middle-aged immigrants and their children live in middle-class comfort.
- 30 **SUBURBAN SPRAWL** – Suburban Sprawl is an unusual American lifestyle: a collection of mid-scale, middle-aged singles and couples living in the heart of suburbia. Typically members of the Baby Boom generation, they hold decent jobs, own older homes and condos, and pursue conservative versions of the American Dream. Among their favorite activities are jogging on treadmills, playing trivia games and renting videos.
- 31 **URBAN ACHIEVERS** – Concentrated in the nation's port cities, Urban Achievers is often the first stop for up-and-coming immigrants from Asia, South America and Europe. These young singles and couples are typically college-educated and ethnically diverse: about a third are foreign-born, and even more speak a language other than English.
- 32 **NEW HOMESTEADERS** – Young, middle-class families seeking to escape suburban sprawl find refuge in New Homesteaders, a collection of small rustic townships filled with new ranches and Cape Cods. With decent-paying jobs in white-collar and service industries, these dual-income couples have fashioned comfortable, child-centered lifestyles, their driveways filled with campers and powerboats, their family rooms with PlayStations and Game Boys.
- 33 **BIG SKY FAMILIES** – Scattered in placid towns across the American heartland, Big Sky Families is a segment of young rural families who have turned high school educations and blue-collar jobs into busy, middle-class lifestyles. Residents like to play baseball, basketball and volleyball in addition to going fishing, hunting and horseback riding. To entertain their sprawling families, they buy virtually every piece of sporting equipment on the market.
- 34 **WHITE PICKET FENCES** – Midpoint on the socioeconomic ladder, residents in White Picket Fences look a lot like the stereotypical American household of a generation ago: young, middle-class, married with children. But the current version is characterized by modest homes and ethnic diversity—including a disproportionate number of Hispanics and African-Americans.

Brief Segment Descriptions

- 35 **BOOMTOWN SINGLES** – Affordable housing, abundant entry-level jobs and a thriving singles scene— all have given rise to the Boomtown Singles segment in fast-growing satellite cities. Young, single and working-class, these residents pursue active lifestyles amid sprawling apartment complexes, bars, convenience stores and laundromats.
- 36 **BLUE-CHIP BLUES** – Blue-Chip Blues is known as a comfortable lifestyle for young, sprawling families with well-paying blue-collar jobs. Ethnically diverse—with a significant presence of Hispanics and African-Americans—the segment’s aging neighborhoods feature compact, modestly priced homes surrounded by commercial centers that cater to child-filled households.
- 37 **MAYBERRY-VILLE** – Like the old Andy Griffith Show set in a quaint picturesque berg, Mayberry-ville harks back to an old-fashioned way of life. In these small towns, middle-class couples and families like to fish and hunt during the day, and stay home and watch TV at night. With lucrative blue-collar jobs and moderately priced housing, residents use their discretionary cash to purchase boats, campers, motorcycles and pickup trucks.
- 38 **SIMPLE PLEASURES** – With more than two-thirds of its residents over 65 years old, Simple Pleasures is mostly a retirement lifestyle: a neighborhood of lower-middle-class singles and couples living in modestly priced homes. Many are high school-educated seniors who held blue-collar jobs before their retirement, and a disproportionate number served in the military; no segment has more members of veterans clubs.
- 39 **DOMESTIC DUOS** – Domestic Duos represents a middle-class mix of mainly over-55 singles and married couples living in older suburban homes. With their high-school educations and fixed incomes, segment residents maintain an easy-going lifestyle. Residents like to socialize by going bowling, seeing a play, meeting at the local fraternal order or going out to eat.
- 40 **CLOSE-IN COUPLES** – Close-In Couples is a group of predominantly African-American couples living in older homes in the urban neighborhoods of mid-sized metros. High school educated and empty nesting, these 55-year-old-plus residents typically live in older city neighborhoods, enjoying secure and comfortable retirements.
- 41 **SUNSET CITY BLUES** – Scattered throughout the older neighborhoods of small cities, Sunset City Blues is a segment of lower-middle-class singles and couples who have retired or are getting close to retirement. These empty-nesters tend to own their homes but have modest educations and incomes. They maintain a low-key lifestyle filled with newspapers and television by day, and family-style restaurants at night.

Brief Segment Descriptions

- 42 **RED, WHITE & BLUES** – The residents of Red, White & Blues typically live in exurban towns rapidly morphing into bedroom suburbs. Their streets feature new fast-food restaurants, and locals have recently celebrated the arrival of chains like Wal-Mart, Radio Shack and Payless Shoes. Middle-aged, high school educated and lower-middle class, these folks tend to have solid, blue-collar jobs in manufacturing, milling and construction.
- 43 **HEARTLANDERS** – America was once a land of small middle-class towns, which can still be found today among Heartlanders. This widespread segment consists of middle-aged couples with working-class jobs living in sturdy, unpretentious homes. In these communities of small families and empty-nesting couples, Heartlanders pursue a rustic lifestyle where hunting and fishing remain prime leisure activities along with cooking, sewing, camping and boating.
- 44 **NEW BEGINNINGS** – Filled with young, single adults, New Beginnings is a magnet for adults in transition. Many of its residents are twenty-something singles and couples just starting out on their career paths—or starting over after recent divorces or company transfers. Ethnically diverse—with nearly half its residents Hispanic, Asian or African-American—New Beginnings households tend to have the modest living standards typical of transient apartment dwellers.
- 45 **BLUE HIGHWAYS** – On maps, blue highways are often two-lane roads that wind through remote stretches of the American landscape. Among lifestyles, Blue Highways is the standout for lower-middle-class couples and families who live in isolated towns and farmsteads. Here, Boomer men like to hunt and fish; the women enjoy sewing and crafts, and everyone looks forward to going out to a country music concert.
- 46 **OLD GLORIES** – Old Glories are the nation’s downscale suburban retirees, Americans aging in place in older apartment complexes. These racially mixed households often contain widows and widowers living on fixed incomes, and they tend to lead home-centered lifestyles. They’re among the nation’s most ardent television fans, watching game shows, soaps, talk shows and newsmagazines at high rates.
- 47 **CITY STARTUPS** – In City Startups, young, multi-ethnic singles have settled in neighborhoods filled with cheap apartments and a commercial base of cafés, bars, laundromats and clubs that cater to twenty-somethings. One of the youngest segments in America—with ten times as many college students as the national average—these neighborhoods feature low incomes and high concentrations of Hispanics and African-Americans.

Brief Segment Descriptions

- 48 **YOUNG & RUSTIC** – Like the soap opera that inspired its nickname, Young & Rustic is composed of young, restless singles. Unlike the glitzy soap denizens, however, these folks tend to be lower income, high school-educated and live in tiny apartments in the nation’s exurban towns. With their service industry jobs and modest incomes, these folks still try to fashion fast-paced lifestyles centered on sports, cars and dating.
- 49 **AMERICAN CLASSICS** – They may be older, lower-middle class and retired, but the residents of American Classics are still living the American Dream of home ownership. Few segments rank higher in their percentage of home owners, and that fact alone reflects a more comfortable lifestyle for these predominantly white singles and couples with deep ties to their neighborhoods.
- 50 **KID COUNTRY, USA** – Widely scattered throughout the nation’s heartland, Kid Country, USA is a segment dominated by large families living in small towns. Predominantly white with an above-average concentration of Hispanics, these young working-class households include homeowners, renters and military personnel living in base housing; about 20 percent of residents own mobile homes.
- 51 **SHOTGUNS & PICKUPS** – The segment known as Shotguns & Pickups came by its moniker honestly: it scores near the top of all lifestyles for owning hunting rifles and pickup trucks. These Americans tend to be young, working-class couples with large families—more than half have two or more kids—living in small homes and manufactured housing. Nearly a third of residents live in mobile homes, more than any other segment.
- 52 **SUBURBAN PIONEERS** – Suburban Pioneers represents one of the nation’s eclectic lifestyles, a mix of young singles, recently divorced and single parents who have moved into older, inner-ring suburbs. They live in aging homes and garden-style apartment buildings where the jobs are blue-collar and the money is tight. What unites these residents—a diverse mix of whites, Hispanics and African-Americans—is a working-class sensibility and an appreciation for their off-the-beaten-track neighborhoods.
- 53 **MOBILITY BLUES** – Young singles and single parents make their way to Mobility Blues, a segment of working-class neighborhoods in America’s satellite cities. Racially mixed and under 25 years old, these transient Americans tend to have modest lifestyles due to their lower-income blue-collar jobs. Surveys show they excel in going to movies, playing basketball and shooting pool.
- 54 **MULTI-CULTI MOSAIC** – An immigrant gateway community, Multi-Culti Mosaic is the urban home for a mixed populace of younger Hispanic, Asian and African-American singles and families. With nearly a quarter of the residents foreign born, this segment is a Mecca for first-generation Americans who are striving to improve their lower-middle-class status.

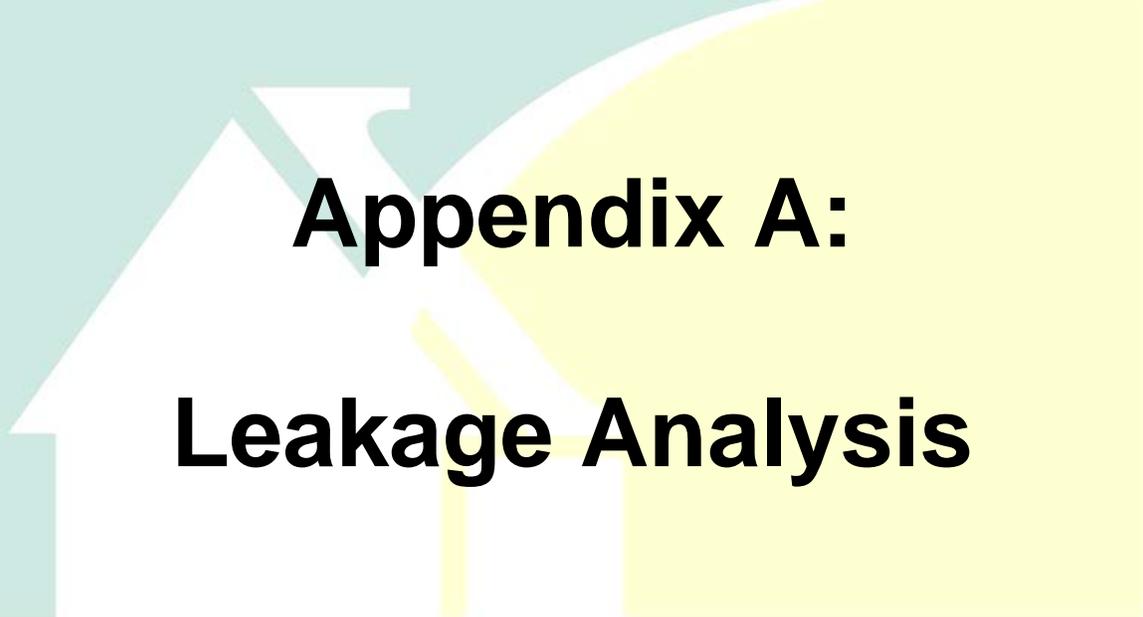
Brief Segment Descriptions

- 55 **GOLDEN PONDS** – Golden Ponds is mostly a retirement lifestyle, dominated by downscale singles and couples over 65 years old. Found in small bucolic towns around the country, these high school-educated seniors live in small apartments on less than \$25,000 a year; one in five resides in a nursing home. For these elderly residents, daily life is often a succession of sedentary activities such as reading, watching TV, playing bingo and doing craft projects.
- 56 **CROSSROADS VILLAGERS** – With a population of middle-aged, blue-collar couples and families, Crossroads Villagers is a classic rural lifestyle. Residents are high school-educated with lower-middle incomes and modest housing; one-quarter live in mobile homes. There’s an air of self-reliance in these households as Crossroads Villagers help put food on the table through fishing, gardening and hunting.
- 57 **OLD MILLTOWNS** – America’s once-thriving mining and manufacturing towns have aged—as have the residents in Old Milltowns communities. Today, the majority of residents are retired singles and couples living on downscale incomes in pre-1960 homes and apartments. For leisure they enjoy gardening, sewing, socializing at veterans clubs or eating out at casual restaurants.
- 58 **BACK COUNTRY FOLKS** – Strewn among remote farm communities across the nation, Back Country Folks are a long way away from economic paradise. The residents tend to be poor, over 55 years old and living in older, modest-sized homes and manufactured housing. Typically, life in this segment is a throwback to an earlier era when farming dominated the American landscape.
- 59 **URBAN ELDERS** – For Urban Elders—a segment located in the downtown neighborhoods of such metros as New York, Chicago, Las Vegas and Miami—life is often an economic struggle. These communities have high concentrations of Hispanics and African-Americans and tend to be downscale, with singles living in older apartment rentals.
- 60 **PARK BENCH SENIORS** – Park Bench Seniors are typically retired singles living in the racially mixed neighborhoods of the nation’s satellite cities. With modest educations and incomes, these residents maintain low-key, sedentary lifestyles. Theirs is one of the top-ranked segments for TV viewing, especially daytime soaps and game shows.
- 61 **CITY ROOTS** – Found in urban neighborhoods, City Roots is a segment of lower-income retirees, typically living in older homes and duplexes they’ve owned for years. In these ethnically diverse neighborhoods—more than a third are African-American and Hispanic—residents are often widows and widowers living on fixed incomes and maintaining low-key lifestyles.

Brief Segment Descriptions

- 62 **HOMETOWN RETIRED** – With three-quarters of all residents over 65 years old, Hometown Retired is one of the oldest segments. These racially mixed seniors tend to live in aging homes—half were built before 1958—and typically get by on social security and modest pensions. Because most never made it beyond high school and spent their working lives at blue-collar jobs, their retirements are extremely modest.
- 63 **FAMILY THRIFTS** – The small-city cousins of inner-city districts, Family Thrifts contain young, ethnically diverse parents who have lots of children and work entry-level service jobs. In these apartment-filled neighborhoods, visitors find the streets jam-packed with babies and toddlers, tricycles and basketball hoops, Daewoos and Hyundais.
- 64 **BEDROCK AMERICA** – Bedrock America consists of young, economically challenged families in small, isolated towns located throughout the nation’s heartland. With modest educations, sprawling families and blue-collar jobs, many of these residents struggle to make ends meet. One quarter live in mobile homes. One in three has not finished high school. Rich in scenery, Bedrock America is a haven for fishing, hunting, hiking and camping.
- 65 **BIG CITY BLUES** – With a population that’s half Latino, Big City Blues has the highest concentration of Hispanic Americans in the nation, but it’s also the multi-ethnic address for downscale Asian and African-American households occupying older inner-city apartments. Concentrated in a handful of major metros, these young singles and single-parent families face enormous challenges: low incomes, uncertain jobs and modest educations. More than 40% haven’t finished high school.
- 66 **LOW-RISE LIVING** – The most economically challenged urban segment, Low-Rise Living is known as a transient world for young, ethnically diverse singles and single parents. Home values are low—about half the national average—and even then, less than a quarter of residents can afford to own real estate.

Buxton utilizes the Claritas® PRIZM®NE segmentation system in this analysis. PRIZM®NE and Claritas® are registered trademarks of Claritas Inc. The PRIZM segment nicknames (e.g., “Blue Blood Estates,” “Big Sky Families,” “Country Squires”) are trademarks of Claritas Inc.

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Appendix A: Leakage Analysis

Retail Leakage and Surplus Analysis

The Retail Leakage and Surplus Analysis examines the quantitative aspect of the community's retail opportunities. It is a guide to understanding retail opportunities but it is not an analysis that indicates unconditional opportunities. The analysis is sometimes called "a gap analysis" or "a supply and demand analysis" and can aid in the following:

- * Indicating how well the retail needs of local residents are being met
- * Uncovering unmet demand and possible opportunities
- * Understanding the strengths and weaknesses of the local retail sector
- * Measuring the difference between actual and potential retail sales

Understanding Retail Leakage

Retail leakage means that residents are spending more for products than local businesses capture. Retail sales leakage suggests that there is unmet demand in the trade area and that the community can support additional store space for that type of business.

However, retail leakage does not necessarily translate into opportunity. For example, there could be a strong competitor in a neighboring community that dominates the market for that type of product or store.

Understanding Retail Surplus

A retail surplus means that the community's trade area is capturing the local market plus attracting non-local shoppers. A retail surplus does not necessarily mean that the community cannot support additional business. Many communities have developed strong clusters of stores that have broad geographic appeal. Examples of these types of retailers include: sporting goods stores, home furnishing stores, restaurants, and other specialty operations that become destination retailers and draw customers from outside the trade area.

Examining the quantitative aspects (Leakage/Surplus) is only part of the evaluation of community's retail opportunities. Before any conclusions can be drawn about potential business expansion or recruitment opportunities, qualitative considerations such as trade area psychographics and buying habits must be analyzed in context of other market factors.

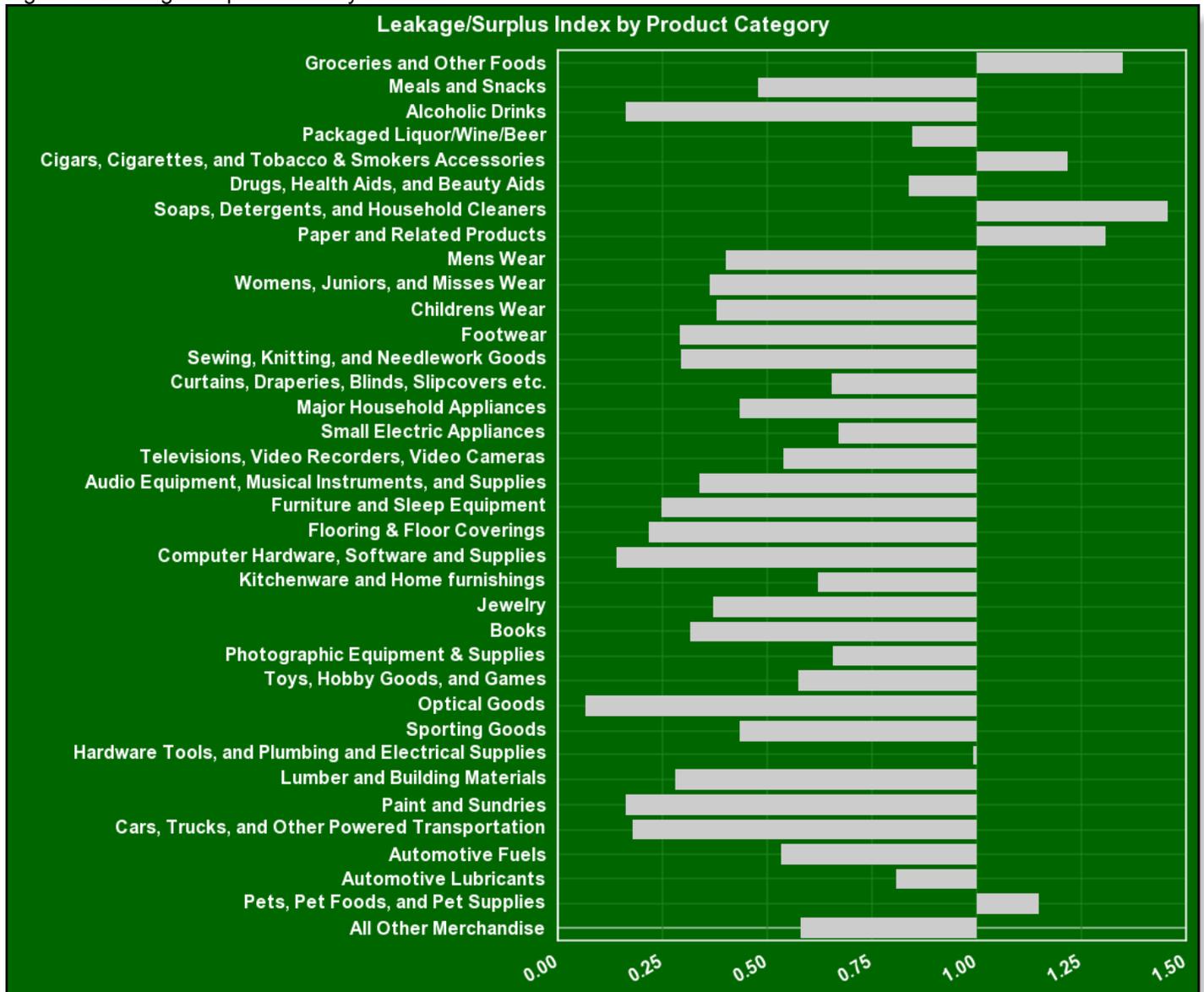
Site	Address	Analysis Geography
Site 1	Hwy 41 & Bush St Lemoore, CA 93245	13 Minute Trade Area

Leakage/Surplus Index by Product

The Leakage/Surplus Index provides a relative comparison of the supply and demand across retail product categories. It is calculated by dividing actual sales by potential sales. An index greater than 1.0 means that the community is attracting retail sales (surplus) from outside the trade area. If the index is less than 1.0 it means that out-shopping is taking place and the community is not successfully drawing its own residents.

Leakage/Surplus Index (Figure 1) shows the strengths and weaknesses of a community's retail market by product.

Figure 1. Leakage/Surplus Index by Product



Site	Address	Analysis Geography
Site 1	Hwy 41 & Bush St Lemoore, CA 93245	13 Minute Trade Area

The sales potential and the actual sales potential by product category and the resulting index are shown in Figure 2.

Figure 2. Sales Potential and Actual Sales by Product

Product Type	Potential	Actual Sales	Leakage/Surplus Index
Groceries and Other Foods	88,116,712	119,052,147	1.4
Meals and Snacks	54,499,943	26,009,617	0.5
Alcoholic Drinks	5,147,059	838,068	0.2
Packaged Liquor/Wine/Beer	9,381,687	7,961,604	0.8
Cigars, Cigarettes, and Tobacco & Smokers Accessories	7,693,125	9,369,257	1.2
Drugs, Health Aids, and Beauty Aids	28,822,304	24,165,937	0.8
Soaps, Detergents, and Household Cleaners	3,652,244	5,323,918	1.5
Paper and Related Products	3,976,092	5,211,912	1.3
Mens Wear	11,169,005	4,504,860	0.4
Womens, Juniors, and Misses Wear	21,120,388	7,704,554	0.4
Childrens Wear	7,476,765	2,845,805	0.4
Footwear	9,339,707	2,715,545	0.3
Sewing, Knitting, and Needlework Goods	1,004,978	296,215	0.3
Curtains, Draperies, Blinds, Slipcovers etc.	3,184,586	2,088,780	0.7
Major Household Appliances	3,760,361	1,639,967	0.4
Small Electric Appliances	1,723,151	1,155,404	0.7
Televisions, Video Recorders, Video Cameras	4,211,912	2,267,318	0.5
Audio Equipment, Musical Instruments, and Supplies	6,830,455	2,294,332	0.3
Furniture and Sleep Equipment	8,758,827	2,169,423	0.2
Flooring & Floor Coverings	3,301,847	716,918	0.2
Computer Hardware, Software and Supplies	11,790,634	1,667,030	0.1
Kitchenware and Home furnishings	6,330,887	3,938,561	0.6
Jewelry	5,368,922	2,002,940	0.4
Books	3,555,238	1,122,243	0.3
Photographic Equipment & Supplies	1,247,177	820,399	0.7
Toys, Hobby Goods, and Games	4,823,231	2,763,081	0.6
Optical Goods	1,085,079	70,749	0.1
Sporting Goods	6,723,084	2,931,555	0.4
Hardware Tools, and Plumbing and Electrical Supplies	28,480,983	28,282,258	1.0
Lumber and Building Materials	21,591,235	6,019,791	0.3
Paint and Sundries	3,305,983	542,017	0.2
Cars, Trucks, and Other Powered Transportation	88,654,299	15,902,122	0.2
Automotive Fuels	47,689,459	25,427,699	0.5
Automotive Lubricants	18,035,294	14,537,632	0.8
Pets, Pet Foods, and Pet Supplies	2,357,324	2,710,582	1.2
All Other Merchandise	15,930,003	9,239,502	0.6

Site	Address	Analysis Geography
Site 1	Hwy 41 & Bush St Lemoore, CA 93245	13 Minute Trade Area

Leakage/Surplus Index by Major Store Type

The quantitative comparison of retail leakage and surplus in the twelve major store types shown in the chart and table below provides an initial measure of market opportunities. Combining this analysis with the knowledge of the local retail situation will take the process of identifying retail possibilities one step further.

Figure 3 provides the leakage/surplus indices and following is the sales potential and actual sales for major store types.

Figure 3. Leakage/Surplus Index and Actual and Potential Sales by Major Store Types



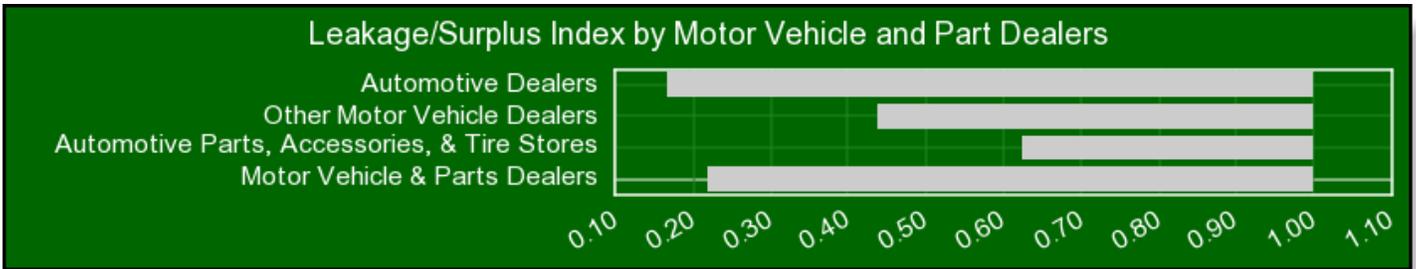
Store Type	Potential	Actual Sales	Leakage/Surplus Index
Motor Vehicle & Parts Dealers	109,915,529	23,885,567	0.22
Furniture & Home Furnishings Stores	12,349,075	1,810,953	0.15
Electronics & Appliances Stores	12,750,410	5,505,331	0.43
Building Material & Garden Equipment & Supply Dealers	50,222,972	32,032,179	0.64
Food & Beverage Stores	72,511,281	131,063,806	1.81
Health & Personal Care Stores	22,797,905	10,814,138	0.47
Clothing & Clothing Accessories Stores	27,229,079	1,715,168	0.06
Sporting Goods, Hobby, Book, & Music Stores	10,398,126	775,002	0.07
General Merchandise Stores	67,975,304	64,831,563	0.95
Miscellaneous Store Retailers	12,937,064	5,567,976	0.43
Foodservice & Drinking Places	55,211,630	23,945,241	0.43
GAFO	135,750,476	76,767,966	0.57
Total Retail Sales (Including Food Service & Drinking Places)	550,139,972	346,309,780	0.63

* GAFO refers to discount retailers that typically include the following departments: general merchandise; clothing and clothing accessories; furniture and home furnishings; electronics and appliances; sporting goods, hobby, books and music; and office supplies.

Site	Address	Analysis Geography
Site 1	Hwy 41 & Bush St Lemoore, CA 93245	13 Minute Trade Area

Leakage/Surplus Analysis by Sub-Categories of Major Retail Types

Additional leakage/surplus details are provided on subcategories of stores in each of the twelve major store types. These details can help further identify possible business expansion opportunities.



Motor Vehicle and Parts Dealers	Potential	Actual Sales	Leakage/Surplus Index
Automotive Dealers	95,208,910	15,888,327	0.17
Other Motor Vehicle Dealers	6,322,673	2,768,613	0.44
Automotive Parts, Accessories, & Tire Stores	8,383,945	5,228,626	0.62
Motor Vehicle & Parts Dealers	109,915,529	23,885,567	0.22

Site	Address	Analysis Geography
Site 1	Hwy 41 & Bush St Lemoore, CA 93245	13 Minute Trade Area



Electronics and Appliance Stores	Potential	Actual Sales	Leakage/Surplus Index
Household Appliances Stores	1,985,064	18,926	0.01
Radio Television and Other Electronics Stores	7,846,215	5,453,899	0.70
Appliance, Television, and Other Electronics Stores	9,831,279	5,472,825	0.56
Computer and Software Stores	2,447,374	32,506	0.01
Camera & Photographic Equipment Stores	471,756	0	0.00
Electronics & Appliances Stores	12,750,410	5,505,331	0.43

Site	Address	Analysis Geography
Site 1	Hwy 41 & Bush St Lemoore, CA 93245	13 Minute Trade Area



Furniture and Home Furnishings Stores	Potential	Actual Sales	Leakage/Surplus Index
Furniture Stores	6,993,737	928,200	0.13
Home Furnishing Stores	5,355,337	882,753	0.16
Furniture & Home Furnishings Stores	12,349,075	1,810,953	0.15

Site	Address	Analysis Geography
Site 1	Hwy 41 & Bush St Lemoore, CA 93245	13 Minute Trade Area



Building Material, Garden Equipment and Supply Dealers	Potential	Actual Sales	Leakage/Surplus Index
Home Centers	18,501,888	0	0.00
Paint and Wallpaper Stores	1,026,076	31,011	0.03
Hardware Stores	4,025,321	2,402,300	0.60
Building Materials, Lumberyards	7,706,350	2,957,115	0.38
Other Building Materials Dealers	22,460,417	8,671,623	0.39
Building Material & Supply Dealers	46,013,703	11,104,934	0.24
Outdoor Power Equipment Stores	617,525	0	0.00
Nursery and Garden Centers	3,591,742	20,927,244	5.83
Lawn and Garden Equipment and Supplies Stores	4,209,268	20,927,244	4.97
Building Material & Garden Equipment & Supply Dealers	50,222,972	32,032,179	0.64

Site	Address	Analysis Geography
Site 1	Hwy 41 & Bush St Lemoore, CA 93245	13 Minute Trade Area



Food and Beverage Stores	Potential	Actual Sales	Leakage/Surplus Index
Supermarkets and Other Grocery (except Convenience) Stores	63,062,950	117,687,031	1.87
Convenience Stores	3,132,877	11,212,206	3.58
Grocery Stores	66,195,827	128,899,237	1.95
Specialty Food Stores	2,186,847	811,955	0.37
Beer, Wine, & Liquor Stores	4,128,605	1,352,613	0.33
Food & Beverage Stores	72,511,281	131,063,806	1.81

Site	Address	Analysis Geography
Site 1	Hwy 41 & Bush St Lemoore, CA 93245	13 Minute Trade Area



Health and Personal Care Stores	Potential	Actual Sales	Leakage/Surplus Index
Pharmacies and Drug Stores	19,733,654	10,248,512	0.52
Cosmetics, Beauty Supplies and Perfume Stores	747,908	143,921	0.19
Optical Goods Stores	909,659	0	0.00
Other Health and Personal Care Stores	1,406,682	421,705	0.30
Health & Personal Care Stores	22,797,905	10,814,138	0.47

Site	Address	Analysis Geography
Site 1	Hwy 41 & Bush St Lemoore, CA 93245	13 Minute Trade Area



Clothing and Clothing Accessories Stores	Potential	Actual Sales	Leakage/Surplus Index
Mens Clothing Stores	1,261,802	0	0.00
Womens Clothing Stores	5,003,848	819,501	0.16
Childrens and Infants Clothing Stores	1,390,530	0	0.00
Family Clothing Stores	10,686,013	0	0.00
Clothing Accessories Stores	409,401	77,912	0.19
Other Clothing Stores	1,269,955	502,594	0.40
Clothing Stores	20,021,553	1,400,007	0.07
Shoe Stores	3,974,336	0	0.00
Jewelry Stores	2,966,233	315,161	0.11
Luggage, & Leather Goods Stores	266,954	0	0.00
Jewelry, Luggage, & Leather Goods Stores	3,233,188	315,161	0.10
Clothing & Clothing Accessories Stores	27,229,079	1,715,168	0.06

Site	Address	Analysis Geography
Site 1	Hwy 41 & Bush St Lemoore, CA 93245	13 Minute Trade Area



Sporting Goods, Hobby, Book and Music Stores	Potential	Actual Sales	Leakage/Surplus Index
Sporting Goods Stores	3,408,633	106,534	0.03
Hobby, Toys and Games Stores	2,232,553	668,467	0.30
Sew/Needlework/Piece Goods Stores	584,911	0	0.00
Musical Instrument and Supplies Stores	751,929	0	0.00
Sporting Goods, Hobby, & Musical Instrument Stores	6,978,028	775,002	0.11
Book Stores	2,125,663	0	0.00
News Dealers and Newsstands	98,628	0	0.00
Book Stores and News Dealers	2,224,292	0	0.00
Prerecorded Tape, Compact Disc, and Record Stores	1,195,805	0	0.00
Book, Periodical, & Music Stores	3,420,097	0	0.00
Sporting Goods, Hobby, Book, & Music Stores	10,398,126	775,002	0.07

Site	Address	Analysis Geography
Site 1	Hwy 41 & Bush St Lemoore, CA 93245	13 Minute Trade Area



General Merchandise Stores	Potential	Actual Sales	Leakage/Surplus Index
Department Stores excluding leased depts.	31,850,370	27,355,956	0.86
Warehouse Clubs and Super Stores	31,375,713	30,431,325	0.97
All Other General Merchandise Stores	4,749,221	7,044,282	1.48
Other General Merchandise Stores	36,124,934	37,475,607	1.04
General Merchandise Stores	67,975,304	64,831,563	0.95

Site	Address	Analysis Geography
Site 1	Hwy 41 & Bush St Lemoore, CA 93245	13 Minute Trade Area



Miscellaneous Store Retailers	Potential	Actual Sales	Leakage/Surplus Index
Florists	881,609	545,039	0.62
Office Supplies and Stationery Stores	2,837,665	824,694	0.29
Gift, Novelty, and Souvenir Stores	2,210,815	1,305,254	0.59
Office Supplies, Stationery, & Gift Stores	5,048,480	2,129,948	0.42
Used Merchandise Stores	1,170,029	1,237,759	1.06
Other Miscellaneous Store Retailers	5,836,945	1,655,229	0.28
Miscellaneous Store Retailers	12,937,064	5,567,976	0.43

Site	Address	Analysis Geography
Site 1	Hwy 41 & Bush St Lemoore, CA 93245	13 Minute Trade Area



Foodservice and Drinking Places	Potential	Actual Sales	Leakage/Surplus Index
Full-service Restaurants	25,243,473	2,384,463	0.09
Limited-service Eating Places	23,009,871	21,101,817	0.92
Special Foodservices	4,685,785	53,135	0.01
Drinking Places -Alcoholic Beverages	2,272,500	405,824	0.18
Foodservice & Drinking Places	55,211,630	23,945,241	0.43

Site	Address	Analysis Geography
Site 1	Hwy 41 & Bush St Lemoore, CA 93245	13 Minute Trade Area

Sources and Methodology

Household demand estimates are derived by combining data from the Consumer Expenditures Survey by the Bureau of Labor Statistics with current household demographic estimates from Claritas. The demand estimates only account for household expenditures. Demand is defined as the estimated dollar amount spent by a household that resides in the area of analysis for a specified retail store type or merchandise line item.

Supply estimates are generated from the Census of Retail Trade, a component of the Economic Census. County-level sales tax data is allocated to low levels of geography using business sales estimates, business locations, and employee counts provided by Claritas' Business Facts® database. Supply includes all products sold at retail outlets in a specified area for a one-year period. Supply is defined as the estimated total retail sales for a retail store type or merchandise line item.

Source: Retail Market Power™ (Claritas).

Retail Leakage and Surplus Analysis

The Retail Leakage and Surplus Analysis examines the quantitative aspect of the community's retail opportunities. It is a guide to understanding retail opportunities but it is not an analysis that indicates unconditional opportunities. The analysis is sometimes called "a gap analysis" or "a supply and demand analysis" and can aid in the following:

- * Indicating how well the retail needs of local residents are being met
- * Uncovering unmet demand and possible opportunities
- * Understanding the strengths and weaknesses of the local retail sector
- * Measuring the difference between actual and potential retail sales

Understanding Retail Leakage

Retail leakage means that residents are spending more for products than local businesses capture. Retail sales leakage suggests that there is unmet demand in the trade area and that the community can support additional store space for that type of business.

However, retail leakage does not necessarily translate into opportunity. For example, there could be a strong competitor in a neighboring community that dominates the market for that type of product or store.

Understanding Retail Surplus

A retail surplus means that the community's trade area is capturing the local market plus attracting non-local shoppers. A retail surplus does not necessarily mean that the community cannot support additional business. Many communities have developed strong clusters of stores that have broad geographic appeal. Examples of these types of retailers include: sporting goods stores, home furnishing stores, restaurants, and other specialty operations that become destination retailers and draw customers from outside the trade area.

Examining the quantitative aspects (Leakage/Surplus) is only part of the evaluation of community's retail opportunities. Before any conclusions can be drawn about potential business expansion or recruitment opportunities, qualitative considerations such as trade area psychographics and buying habits must be analyzed in context of other market factors.

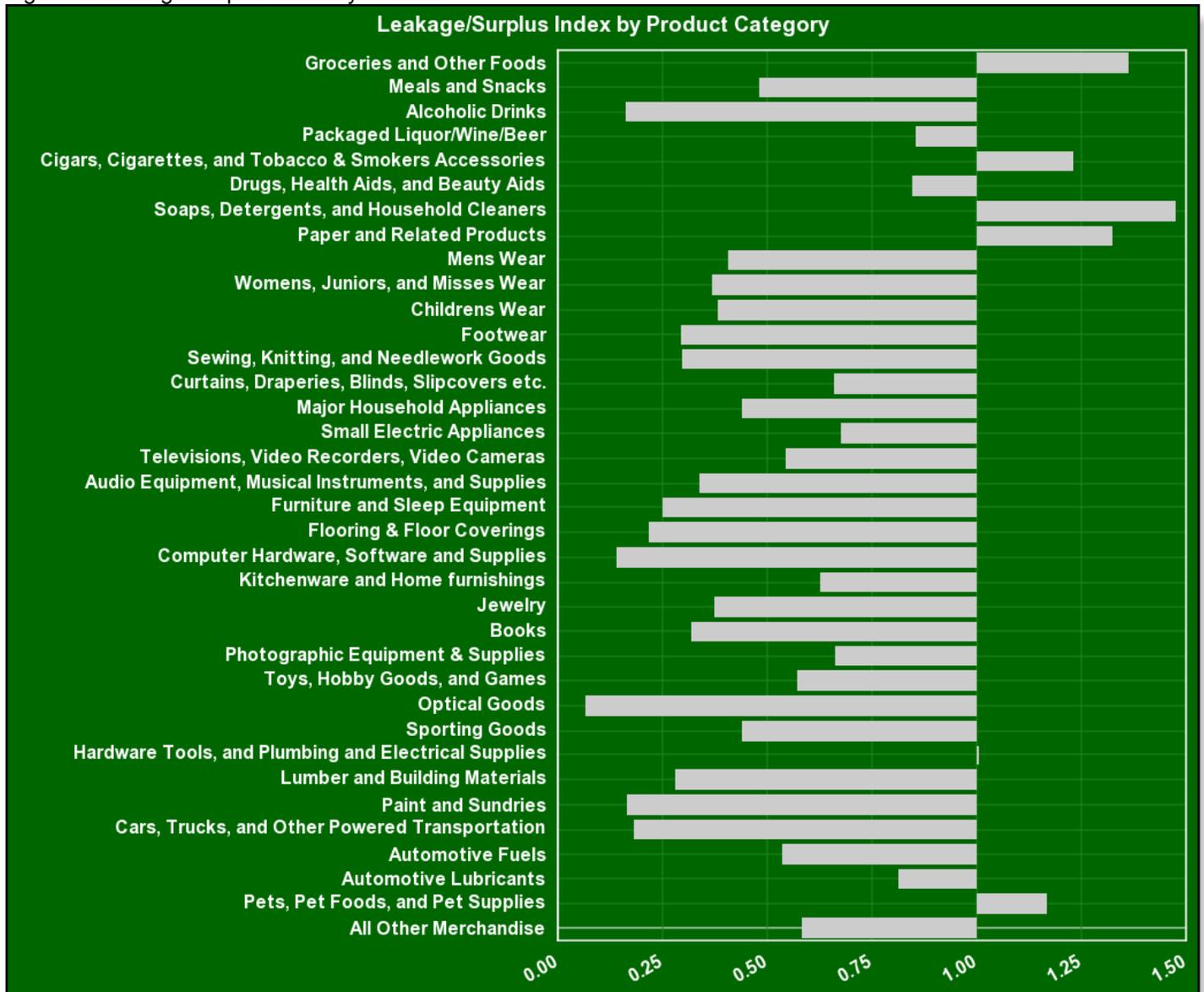
Site	Address	Analysis Geography
Site 2	Hwy 198 & 19th Ave Lemoore, CA 93245	13 Minute Trade Area

Leakage/Surplus Index by Product

The Leakage/Surplus Index provides a relative comparison of the supply and demand across retail product categories. It is calculated by dividing actual sales by potential sales. An index greater than 1.0 means that the community is attracting retail sales (surplus) from outside the trade area. If the index is less than 1.0 it means that out-shopping is taking place and the community is not successfully drawing its own residents.

Leakage/Surplus Index (Figure 1) shows the strengths and weaknesses of a community's retail market by product.

Figure 1. Leakage/Surplus Index by Product



Site	Address	Analysis Geography
Site 2	Hwy 198 & 19th Ave Lemoore, CA 93245	13 Minute Trade Area

The sales potential and the actual sales potential by product category and the resulting index are shown in Figure 2.

Figure 2. Sales Potential and Actual Sales by Product

Product Type	Potential	Actual Sales	Leakage/Surplus Index
Groceries and Other Foods	87,484,932	119,436,155	1.4
Meals and Snacks	54,159,184	26,011,182	0.5
Alcoholic Drinks	5,111,699	838,072	0.2
Packaged Liquor/Wine/Beer	9,312,049	7,981,662	0.9
Cigars, Cigarettes, and Tobacco & Smokers Accessories	7,637,549	9,394,957	1.2
Drugs, Health Aids, and Beauty Aids	28,587,351	24,221,291	0.8
Soaps, Detergents, and Household Cleaners	3,621,370	5,345,379	1.5
Paper and Related Products	3,949,220	5,235,060	1.3
Mens Wear	11,085,140	4,517,505	0.4
Womens, Juniors, and Misses Wear	20,981,264	7,731,843	0.4
Childrens Wear	7,427,486	2,850,028	0.4
Footwear	9,274,438	2,727,882	0.3
Sewing, Knitting, and Needlework Goods	998,293	296,501	0.3
Curtains, Draperies, Blinds, Slipcovers etc.	3,161,875	2,091,655	0.7
Major Household Appliances	3,734,279	1,640,127	0.4
Small Electric Appliances	1,710,831	1,158,391	0.7
Televisions, Video Recorders, Video Cameras	4,182,831	2,267,966	0.5
Audio Equipment, Musical Instruments, and Supplies	6,781,830	2,294,169	0.3
Furniture and Sleep Equipment	8,694,806	2,168,061	0.3
Flooring & Floor Coverings	3,278,995	716,986	0.2
Computer Hardware, Software and Supplies	11,708,571	1,667,029	0.1
Kitchenware and Home furnishings	6,283,234	3,944,548	0.6
Jewelry	5,331,235	2,005,416	0.4
Books	3,535,374	1,126,144	0.3
Photographic Equipment & Supplies	1,239,276	823,354	0.7
Toys, Hobby Goods, and Games	4,790,251	2,739,225	0.6
Optical Goods	1,077,318	70,760	0.1
Sporting Goods	6,667,952	2,927,464	0.4
Hardware Tools, and Plumbing and Electrical Supplies	28,293,462	28,439,457	1.0
Lumber and Building Materials	21,445,992	6,015,078	0.3
Paint and Sundries	3,285,205	547,590	0.2
Cars, Trucks, and Other Powered Transportation	87,962,727	15,919,295	0.2
Automotive Fuels	47,324,455	25,376,649	0.5
Automotive Lubricants	17,902,045	14,535,151	0.8
Pets, Pet Foods, and Pet Supplies	2,333,188	2,728,792	1.2
All Other Merchandise	15,825,565	9,257,990	0.6

Site	Address	Analysis Geography
Site 2	Hwy 198 & 19th Ave Lemoore, CA 93245	13 Minute Trade Area

Leakage/Surplus Index by Major Store Type

The quantitative comparison of retail leakage and surplus in the twelve major store types shown in the chart and table below provides an initial measure of market opportunities. Combining this analysis with the knowledge of the local retail situation will take the process of identifying retail possibilities one step further.

Figure 3 provides the leakage/surplus indices and following is the sales potential and actual sales for major store types.

Figure 3. Leakage/Surplus Index and Actual and Potential Sales by Major Store Types



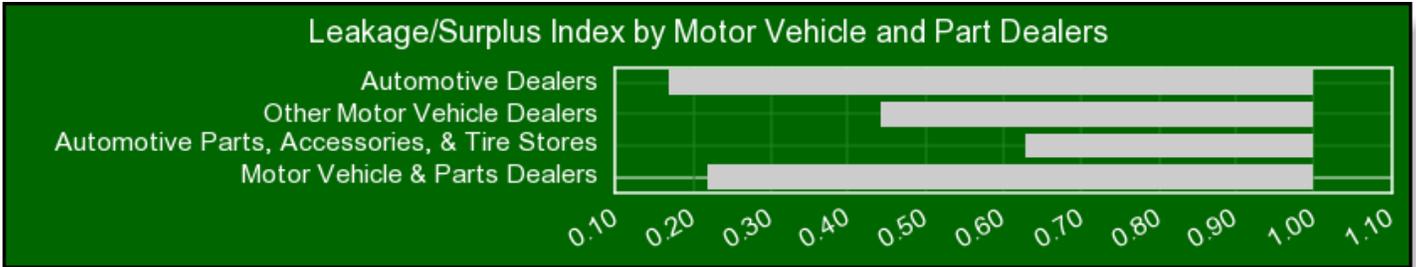
Store Type	Potential	Actual Sales	Leakage/Surplus Index
Motor Vehicle & Parts Dealers	109,071,620	23,893,269	0.22
Furniture & Home Furnishings Stores	12,259,925	1,810,953	0.15
Electronics & Appliances Stores	12,660,546	5,505,331	0.43
Building Material & Garden Equipment & Supply Dealers	49,887,404	32,199,920	0.65
Food & Beverage Stores	71,984,554	131,453,859	1.83
Health & Personal Care Stores	22,618,721	10,814,138	0.48
Clothing & Clothing Accessories Stores	27,040,554	1,748,675	0.06
Sporting Goods, Hobby, Book, & Music Stores	10,325,946	718,465	0.07
General Merchandise Stores	67,489,419	65,057,941	0.96
Miscellaneous Store Retailers	12,845,664	5,601,959	0.44
Foodservice & Drinking Places	54,861,935	23,944,484	0.44
GAFO	134,790,809	76,971,314	0.57
Total Retail Sales (Including Food Service & Drinking Places)	546,181,266	347,048,855	0.64

* GAFO refers to discount retailers that typically include the following departments: general merchandise; clothing and clothing accessories; furniture and home furnishings; electronics and appliances; sporting goods, hobby, books and music; and office supplies.

Site	Address	Analysis Geography
Site 2	Hwy 198 & 19th Ave Lemoore, CA 93245	13 Minute Trade Area

Leakage/Surplus Analysis by Sub-Categories of Major Retail Types

Additional leakage/surplus details are provided on subcategories of stores in each of the twelve major store types. These details can help further identify possible business expansion opportunities.



Motor Vehicle and Parts Dealers	Potential	Actual Sales	Leakage/Surplus Index
Automotive Dealers	94,473,942	15,907,128	0.17
Other Motor Vehicle Dealers	6,274,623	2,768,613	0.44
Automotive Parts, Accessories, & Tire Stores	8,323,054	5,217,527	0.63
Motor Vehicle & Parts Dealers	109,071,620	23,893,269	0.22

Site	Address	Analysis Geography
Site 2	Hwy 198 & 19th Ave Lemoore, CA 93245	13 Minute Trade Area



Electronics and Appliance Stores	Potential	Actual Sales	Leakage/Surplus Index
Household Appliances Stores	1,971,171	18,926	0.01
Radio Television and Other Electronics Stores	7,790,367	5,453,899	0.70
Appliance, Television, and Other Electronics Stores	9,761,539	5,472,825	0.56
Computer and Software Stores	2,430,338	32,506	0.01
Camera & Photographic Equipment Stores	468,668	0	0.00
Electronics & Appliances Stores	12,660,546	5,505,331	0.43

Site	Address	Analysis Geography
Site 2	Hwy 198 & 19th Ave Lemoore, CA 93245	13 Minute Trade Area



Furniture and Home Furnishings Stores	Potential	Actual Sales	Leakage/Surplus Index
Furniture Stores	6,942,709	928,200	0.13
Home Furnishing Stores	5,317,216	882,753	0.17
Furniture & Home Furnishings Stores	12,259,925	1,810,953	0.15

Site	Address	Analysis Geography
Site 2	Hwy 198 & 19th Ave Lemoore, CA 93245	13 Minute Trade Area



Building Material, Garden Equipment and Supply Dealers	Potential	Actual Sales	Leakage/Surplus Index
Home Centers	18,378,579	0	0.00
Paint and Wallpaper Stores	1,019,479	37,213	0.04
Hardware Stores	3,998,334	2,402,300	0.60
Building Materials, Lumberyards	7,654,498	2,954,128	0.39
Other Building Materials Dealers	22,309,604	8,662,863	0.39
Building Material & Supply Dealers	45,705,997	11,102,377	0.24
Outdoor Power Equipment Stores	613,455	0	0.00
Nursery and Garden Centers	3,567,951	21,097,542	5.91
Lawn and Garden Equipment and Supplies Stores	4,181,407	21,097,542	5.05
Building Material & Garden Equipment & Supply Dealers	49,887,404	32,199,920	0.65

Site	Address	Analysis Geography
Site 2	Hwy 198 & 19th Ave Lemoore, CA 93245	13 Minute Trade Area



Food and Beverage Stores	Potential	Actual Sales	Leakage/Surplus Index
Supermarkets and Other Grocery (except Convenience) Stores	62,604,780	118,219,533	1.89
Convenience Stores	3,110,391	11,212,206	3.60
Grocery Stores	65,715,171	129,431,739	1.97
Specialty Food Stores	2,171,255	669,506	0.31
Beer, Wine, & Liquor Stores	4,098,126	1,352,613	0.33
Food & Beverage Stores	71,984,554	131,453,859	1.83

Site	Address	Analysis Geography
Site 2	Hwy 198 & 19th Ave Lemoore, CA 93245	13 Minute Trade Area



Health and Personal Care Stores	Potential	Actual Sales	Leakage/Surplus Index
Pharmacies and Drug Stores	19,578,213	10,248,512	0.52
Cosmetics, Beauty Supplies and Perfume Stores	741,874	143,921	0.19
Optical Goods Stores	903,137	0	0.00
Other Health and Personal Care Stores	1,395,495	421,705	0.30
Health & Personal Care Stores	22,618,721	10,814,138	0.48

Site	Address	Analysis Geography
Site 2	Hwy 198 & 19th Ave Lemoore, CA 93245	13 Minute Trade Area



Clothing and Clothing Accessories Stores	Potential	Actual Sales	Leakage/Surplus Index
Mens Clothing Stores	1,252,417	0	0.00
Womens Clothing Stores	4,970,634	819,501	0.16
Childrens and Infants Clothing Stores	1,381,243	0	0.00
Family Clothing Stores	10,611,484	0	0.00
Clothing Accessories Stores	406,586	77,912	0.19
Other Clothing Stores	1,261,248	536,101	0.43
Clothing Stores	19,883,614	1,433,514	0.07
Shoe Stores	3,946,493	0	0.00
Jewelry Stores	2,945,360	315,161	0.11
Luggage, & Leather Goods Stores	265,085	0	0.00
Jewelry, Luggage, & Leather Goods Stores	3,210,445	315,161	0.10
Clothing & Clothing Accessories Stores	27,040,554	1,748,675	0.06

Site	Address	Analysis Geography
Site 2	Hwy 198 & 19th Ave Lemoore, CA 93245	13 Minute Trade Area



Sporting Goods, Hobby, Book and Music Stores	Potential	Actual Sales	Leakage/Surplus Index
Sporting Goods Stores	3,382,007	93,150	0.03
Hobby, Toys and Games Stores	2,217,190	625,314	0.28
Sew/Needlework/Piece Goods Stores	581,009	0	0.00
Musical Instrument and Supplies Stores	746,532	0	0.00
Sporting Goods, Hobby, & Musical Instrument Stores	6,926,739	718,465	0.10
Book Stores	2,113,220	0	0.00
News Dealers and Newsstands	97,985	0	0.00
Book Stores and News Dealers	2,211,206	0	0.00
Prerecorded Tape, Compact Disc, and Record Stores	1,187,999	0	0.00
Book, Periodical, & Music Stores	3,399,206	0	0.00
Sporting Goods, Hobby, Book, & Music Stores	10,325,946	718,465	0.07

Site	Address	Analysis Geography
Site 2	Hwy 198 & 19th Ave Lemoore, CA 93245	13 Minute Trade Area



General Merchandise Stores	Potential	Actual Sales	Leakage/Surplus Index
Department Stores excluding leased depts.	31,624,268	27,355,956	0.87
Warehouse Clubs and Super Stores	31,149,828	30,657,703	0.98
All Other General Merchandise Stores	4,715,322	7,044,282	1.49
Other General Merchandise Stores	35,865,150	37,701,985	1.05
General Merchandise Stores	67,489,419	65,057,941	0.96

Site	Address	Analysis Geography
Site 2	Hwy 198 & 19th Ave Lemoore, CA 93245	13 Minute Trade Area



Miscellaneous Store Retailers	Potential	Actual Sales	Leakage/Surplus Index
Florists	875,794	545,039	0.62
Office Supplies and Stationery Stores	2,818,539	824,694	0.29
Gift, Novelty, and Souvenir Stores	2,195,877	1,305,254	0.59
Office Supplies, Stationery, & Gift Stores	5,014,417	2,129,948	0.42
Used Merchandise Stores	1,162,069	1,235,230	1.06
Other Miscellaneous Store Retailers	5,793,384	1,691,742	0.29
Miscellaneous Store Retailers	12,845,664	5,601,959	0.44

Site	Address	Analysis Geography
Site 2	Hwy 198 & 19th Ave Lemoore, CA 93245	13 Minute Trade Area



Foodservice and Drinking Places	Potential	Actual Sales	Leakage/Surplus Index
Full-service Restaurants	25,083,351	2,384,463	0.10
Limited-service Eating Places	22,865,529	21,101,817	0.92
Special Foodservices	4,656,085	52,379	0.01
Drinking Places -Alcoholic Beverages	2,256,969	405,824	0.18
Foodservice & Drinking Places	54,861,935	23,944,484	0.44

Site	Address	Analysis Geography
Site 2	Hwy 198 & 19th Ave Lemoore, CA 93245	13 Minute Trade Area

Sources and Methodology

Household demand estimates are derived by combining data from the Consumer Expenditures Survey by the Bureau of Labor Statistics with current household demographic estimates from Claritas. The demand estimates only account for household expenditures. Demand is defined as the estimated dollar amount spent by a household that resides in the area of analysis for a specified retail store type or merchandise line item.

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Source: Retail Market Power™ (Claritas).

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The Retail Leakage and Surplus Analysis examines the quantitative aspect of the community's retail opportunities. It is a guide to understanding retail opportunities but it is not an analysis that indicates unconditional opportunities. The analysis is sometimes called "a gap analysis" or "a supply and demand analysis" and can aid in the following:

- * Indicating how well the retail needs of local residents are being met
- * Uncovering unmet demand and possible opportunities
- * Understanding the strengths and weaknesses of the local retail sector
- * Measuring the difference between actual and potential retail sales

Understanding Retail Leakage

Retail leakage means that residents are spending more for products than local businesses capture. Retail sales leakage suggests that there is unmet demand in the trade area and that the community can support additional store space for that type of business.

However, retail leakage does not necessarily translate into opportunity. For example, there could be a strong competitor in a neighboring community that dominates the market for that type of product or store.

Understanding Retail Surplus

A retail surplus means that the community's trade area is capturing the local market plus attracting non-local shoppers. A retail surplus does not necessarily mean that the community cannot support additional business. Many communities have developed strong clusters of stores that have broad geographic appeal. Examples of these types of retailers include: sporting goods stores, home furnishing stores, restaurants, and other specialty operations that become destination retailers and draw customers from outside the trade area.

Examining the quantitative aspects (Leakage/Surplus) is only part of the evaluation of community's retail opportunities. Before any conclusions can be drawn about potential business expansion or recruitment opportunities, qualitative considerations such as trade area psychographics and buying habits must be analyzed in context of other market factors.

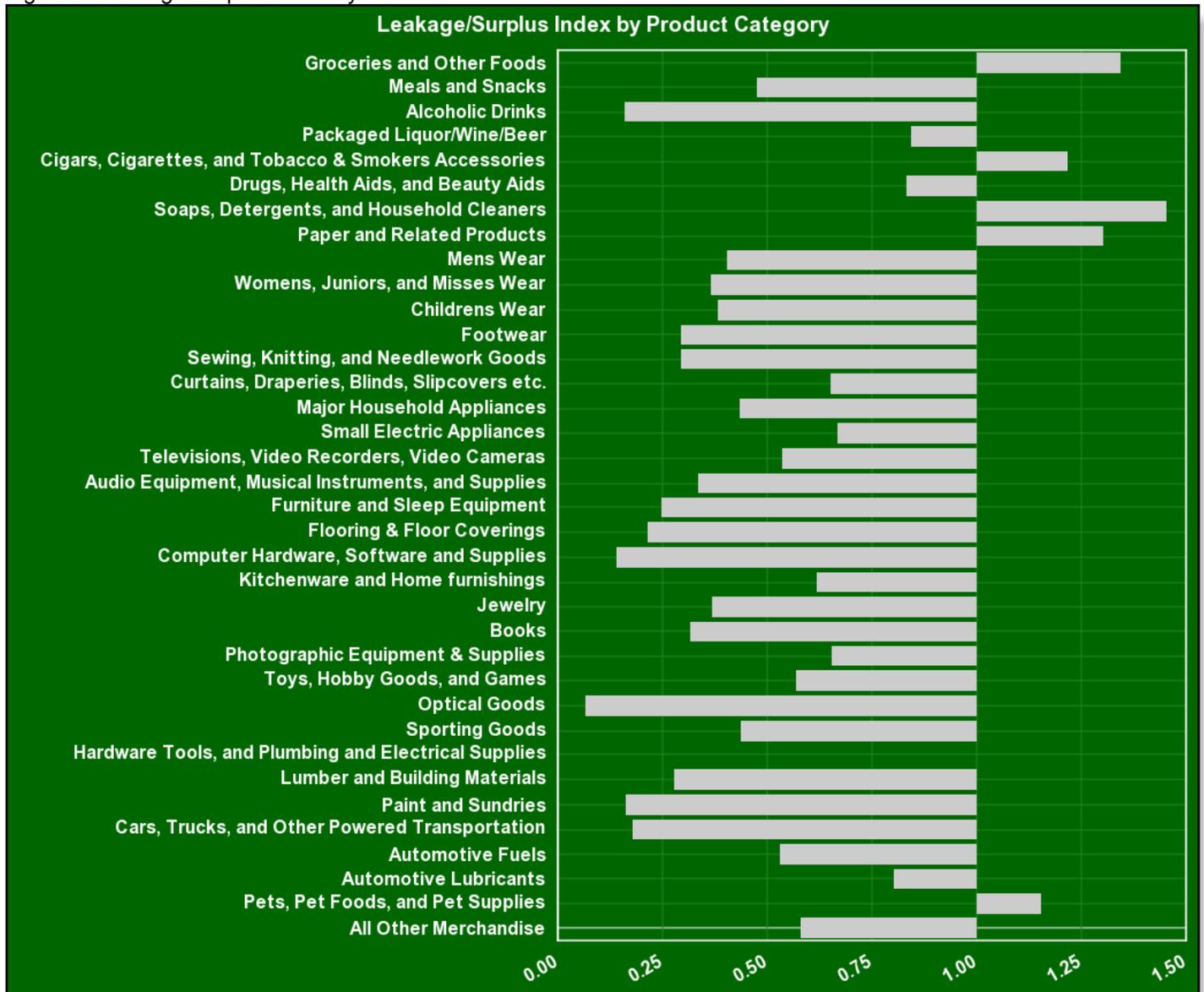
Site	Address	Analysis Geography
Site 3	Lemoore Ave & Hanford-Armona Rd Lemoore, CA 93245	13 Minute Trade Area

Leakage/Surplus Index by Product

The Leakage/Surplus Index provides a relative comparison of the supply and demand across retail product categories. It is calculated by dividing actual sales by potential sales. An index greater than 1.0 means that the community is attracting retail sales (surplus) from outside the trade area. If the index is less than 1.0 it means that out-shopping is taking place and the community is not successfully drawing its own residents.

Leakage/Surplus Index (Figure 1) shows the strengths and weaknesses of a community's retail market by product.

Figure 1. Leakage/Surplus Index by Product



Site	Address	Analysis Geography
Site 3	Lemoore Ave & Hanford-Armona Rd Lemoore, CA 93245	13 Minute Trade Area

The sales potential and the actual sales potential by product category and the resulting index are shown in Figure 2.

Figure 2. Sales Potential and Actual Sales by Product

Product Type	Potential	Actual Sales	Leakage/Surplus Index
Groceries and Other Foods	88,297,782	118,811,206	1.3
Meals and Snacks	54,749,441	26,015,987	0.5
Alcoholic Drinks	5,185,890	837,496	0.2
Packaged Liquor/Wine/Beer	9,415,570	7,963,582	0.8
Cigars, Cigarettes, and Tobacco & Smokers Accessories	7,712,289	9,395,345	1.2
Drugs, Health Aids, and Beauty Aids	28,952,433	24,149,192	0.8
Soaps, Detergents, and Household Cleaners	3,655,769	5,316,175	1.5
Paper and Related Products	3,991,627	5,206,899	1.3
Mens Wear	11,207,430	4,537,658	0.4
Womens, Juniors, and Misses Wear	21,197,950	7,778,834	0.4
Childrens Wear	7,461,870	2,851,812	0.4
Footwear	9,351,355	2,738,744	0.3
Sewing, Knitting, and Needlework Goods	1,010,121	296,744	0.3
Curtains, Draperies, Blinds, Slipcovers etc.	3,203,744	2,092,084	0.7
Major Household Appliances	3,779,490	1,640,497	0.4
Small Electric Appliances	1,730,452	1,158,984	0.7
Televisions, Video Recorders, Video Cameras	4,227,888	2,268,105	0.5
Audio Equipment, Musical Instruments, and Supplies	6,852,082	2,294,218	0.3
Furniture and Sleep Equipment	8,804,255	2,169,384	0.2
Flooring & Floor Coverings	3,325,621	716,821	0.2
Computer Hardware, Software and Supplies	11,851,477	1,667,064	0.1
Kitchenware and Home furnishings	6,373,324	3,943,572	0.6
Jewelry	5,414,006	2,006,205	0.4
Books	3,575,119	1,126,883	0.3
Photographic Equipment & Supplies	1,254,296	823,109	0.7
Toys, Hobby Goods, and Games	4,833,217	2,747,903	0.6
Optical Goods	1,090,759	70,894	0.1
Sporting Goods	6,743,463	2,946,803	0.4
Hardware Tools, and Plumbing and Electrical Supplies	28,666,956	28,700,125	1.0
Lumber and Building Materials	21,733,346	6,013,803	0.3
Paint and Sundries	3,340,466	542,305	0.2
Cars, Trucks, and Other Powered Transportation	88,953,764	15,901,358	0.2
Automotive Fuels	47,892,179	25,326,098	0.5
Automotive Lubricants	18,116,831	14,537,210	0.8
Pets, Pet Foods, and Pet Supplies	2,368,413	2,735,924	1.2
All Other Merchandise	16,038,065	9,282,894	0.6

Site	Address	Analysis Geography
Site 3	Lemoore Ave & Hanford-Armona Rd Lemoore, CA 93245	13 Minute Trade Area

Leakage/Surplus Index by Major Store Type

The quantitative comparison of retail leakage and surplus in the twelve major store types shown in the chart and table below provides an initial measure of market opportunities. Combining this analysis with the knowledge of the local retail situation will take the process of identifying retail possibilities one step further.

Figure 3 provides the leakage/surplus indices and following is the sales potential and actual sales for major store types.

Figure 3. Leakage/Surplus Index and Actual and Potential Sales by Major Store Types



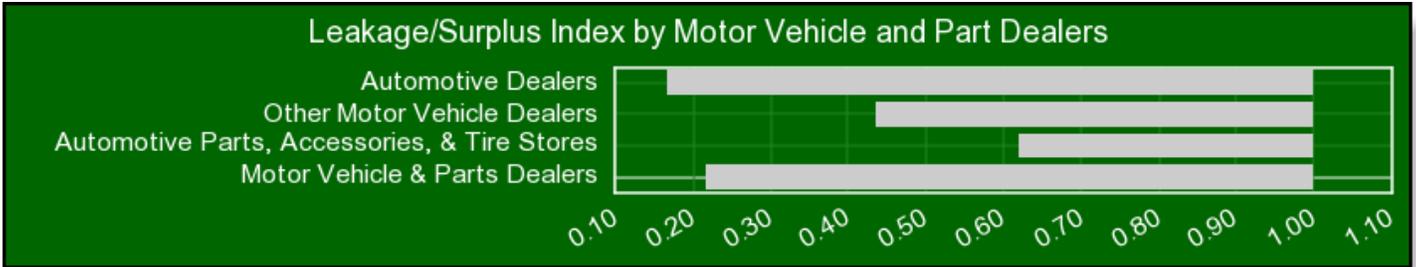
Store Type	Potential	Actual Sales	Leakage/Surplus Index
Motor Vehicle & Parts Dealers	110,307,391	23,869,308	0.22
Furniture & Home Furnishings Stores	12,420,808	1,810,953	0.15
Electronics & Appliances Stores	12,806,015	5,505,331	0.43
Building Material & Garden Equipment & Supply Dealers	50,548,922	32,479,077	0.64
Food & Beverage Stores	72,692,055	130,626,232	1.80
Health & Personal Care Stores	22,897,697	10,814,138	0.47
Clothing & Clothing Accessories Stores	27,320,293	1,815,688	0.07
Sporting Goods, Hobby, Book, & Music Stores	10,436,947	750,940	0.07
General Merchandise Stores	68,206,159	65,094,608	0.95
Miscellaneous Store Retailers	13,008,232	5,674,141	0.44
Foodservice & Drinking Places	55,477,596	23,947,137	0.43
GAFO	136,269,886	77,107,469	0.57
Total Retail Sales (Including Food Service & Drinking Places)	552,358,735	346,611,953	0.63

* GAFO refers to discount retailers that typically include the following departments: general merchandise; clothing and clothing accessories; furniture and home furnishings; electronics and appliances; sporting goods, hobby, books and music; and office supplies.

Site	Address	Analysis Geography
Site 3	Lemoore Ave & Hanford-Armona Rd Lemoore, CA 93245	13 Minute Trade Area

Leakage/Surplus Analysis by Sub-Categories of Major Retail Types

Additional leakage/surplus details are provided on subcategories of stores in each of the twelve major store types. These details can help further identify possible business expansion opportunities.



Motor Vehicle and Parts Dealers	Potential	Actual Sales	Leakage/Surplus Index
Automotive Dealers	95,540,306	15,886,867	0.17
Other Motor Vehicle Dealers	6,345,884	2,768,613	0.44
Automotive Parts, Accessories, & Tire Stores	8,421,201	5,213,828	0.62
Motor Vehicle & Parts Dealers	110,307,391	23,869,308	0.22

Site	Address	Analysis Geography
Site 3	Lemoore Ave & Hanford-Armona Rd Lemoore, CA 93245	13 Minute Trade Area



Electronics and Appliance Stores	Potential	Actual Sales	Leakage/Surplus Index
Household Appliances Stores	1,994,313	18,926	0.01
Radio Television and Other Electronics Stores	7,877,599	5,453,899	0.69
Appliance, Television, and Other Electronics Stores	9,871,913	5,472,825	0.55
Computer and Software Stores	2,459,858	32,506	0.01
Camera & Photographic Equipment Stores	474,243	0	0.00
Electronics & Appliances Stores	12,806,015	5,505,331	0.43

Site	Address	Analysis Geography
Site 3	Lemoore Ave & Hanford-Armona Rd Lemoore, CA 93245	13 Minute Trade Area



Furniture and Home Furnishings Stores	Potential	Actual Sales	Leakage/Surplus Index
Furniture Stores	7,030,446	928,200	0.13
Home Furnishing Stores	5,390,362	882,753	0.16
Furniture & Home Furnishings Stores	12,420,808	1,810,953	0.15

Site	Address	Analysis Geography
Site 3	Lemoore Ave & Hanford-Armona Rd Lemoore, CA 93245	13 Minute Trade Area



Building Material, Garden Equipment and Supply Dealers	Potential	Actual Sales	Leakage/Surplus Index
Home Centers	18,622,765	0	0.00
Paint and Wallpaper Stores	1,035,694	31,011	0.03
Hardware Stores	4,048,726	2,402,300	0.59
Building Materials, Lumberyards	7,755,886	2,952,552	0.38
Other Building Materials Dealers	22,600,471	8,658,241	0.38
Building Material & Supply Dealers	46,307,658	11,091,552	0.24
Outdoor Power Equipment Stores	622,264	0	0.00
Nursery and Garden Centers	3,619,000	21,387,524	5.91
Lawn and Garden Equipment and Supplies Stores	4,241,264	21,387,524	5.04
Building Material & Garden Equipment & Supply Dealers	50,548,922	32,479,077	0.64

Site	Address	Analysis Geography
Site 3	Lemoore Ave & Hanford-Armona Rd Lemoore, CA 93245	13 Minute Trade Area



Food and Beverage Stores	Potential	Actual Sales	Leakage/Surplus Index
Supermarkets and Other Grocery (except Convenience) Stores	63,215,941	117,150,718	1.85
Convenience Stores	3,141,595	11,343,015	3.61
Grocery Stores	66,357,536	128,493,734	1.94
Specialty Food Stores	2,191,341	779,884	0.36
Beer, Wine, & Liquor Stores	4,143,177	1,352,613	0.33
Food & Beverage Stores	72,692,055	130,626,232	1.80

Site	Address	Analysis Geography
Site 3	Lemoore Ave & Hanford-Armona Rd Lemoore, CA 93245	13 Minute Trade Area



Health and Personal Care Stores	Potential	Actual Sales	Leakage/Surplus Index
Pharmacies and Drug Stores	19,819,449	10,248,512	0.52
Cosmetics, Beauty Supplies and Perfume Stores	751,344	143,921	0.19
Optical Goods Stores	914,416	0	0.00
Other Health and Personal Care Stores	1,412,487	421,705	0.30
Health & Personal Care Stores	22,897,697	10,814,138	0.47

Site	Address	Analysis Geography
Site 3	Lemoore Ave & Hanford-Armona Rd Lemoore, CA 93245	13 Minute Trade Area



Clothing and Clothing Accessories Stores	Potential	Actual Sales	Leakage/Surplus Index
Mens Clothing Stores	1,266,014	0	0.00
Womens Clothing Stores	5,022,023	819,501	0.16
Childrens and Infants Clothing Stores	1,388,704	0	0.00
Family Clothing Stores	10,718,747	0	0.00
Clothing Accessories Stores	411,608	77,912	0.19
Other Clothing Stores	1,274,218	603,114	0.47
Clothing Stores	20,081,317	1,500,527	0.07
Shoe Stores	3,979,986	0	0.00
Jewelry Stores	2,990,303	315,161	0.11
Luggage, & Leather Goods Stores	268,685	0	0.00
Jewelry, Luggage, & Leather Goods Stores	3,258,989	315,161	0.10
Clothing & Clothing Accessories Stores	27,320,293	1,815,688	0.07

Site	Address	Analysis Geography
Site 3	Lemoore Ave & Hanford-Armona Rd Lemoore, CA 93245	13 Minute Trade Area



Sporting Goods, Hobby, Book and Music Stores	Potential	Actual Sales	Leakage/Surplus Index
Sporting Goods Stores	3,418,501	114,837	0.03
Hobby, Toys and Games Stores	2,239,608	636,102	0.28
Sew/Needlework/Piece Goods Stores	588,025	0	0.00
Musical Instrument and Supplies Stores	754,333	0	0.00
Sporting Goods, Hobby, & Musical Instrument Stores	7,000,469	750,940	0.11
Book Stores	2,137,251	0	0.00
News Dealers and Newsstands	99,182	0	0.00
Book Stores and News Dealers	2,236,433	0	0.00
Prerecorded Tape, Compact Disc, and Record Stores	1,200,044	0	0.00
Book, Periodical, & Music Stores	3,436,478	0	0.00
Sporting Goods, Hobby, Book, & Music Stores	10,436,947	750,940	0.07

Site	Address	Analysis Geography
Site 3	Lemoore Ave & Hanford-Armona Rd Lemoore, CA 93245	13 Minute Trade Area



General Merchandise Stores	Potential	Actual Sales	Leakage/Surplus Index
Department Stores excluding leased depts.	31,964,809	27,355,956	0.86
Warehouse Clubs and Super Stores	31,470,672	30,694,370	0.98
All Other General Merchandise Stores	4,770,678	7,044,282	1.48
Other General Merchandise Stores	36,241,350	37,738,652	1.04
General Merchandise Stores	68,206,159	65,094,608	0.95

Site	Address	Analysis Geography
Site 3	Lemoore Ave & Hanford-Armona Rd Lemoore, CA 93245	13 Minute Trade Area



Miscellaneous Store Retailers	Potential	Actual Sales	Leakage/Surplus Index
Florists	887,767	545,039	0.61
Office Supplies and Stationery Stores	2,855,507	824,694	0.29
Gift, Novelty, and Souvenir Stores	2,224,153	1,305,254	0.59
Office Supplies, Stationery, & Gift Stores	5,079,661	2,129,948	0.42
Used Merchandise Stores	1,175,549	1,234,386	1.05
Other Miscellaneous Store Retailers	5,865,253	1,764,767	0.30
Miscellaneous Store Retailers	13,008,232	5,674,141	0.44

Site	Address	Analysis Geography
Site 3	Lemoore Ave & Hanford-Armona Rd Lemoore, CA 93245	13 Minute Trade Area



Foodservice and Drinking Places	Potential	Actual Sales	Leakage/Surplus Index
Full-service Restaurants	25,367,416	2,384,463	0.09
Limited-service Eating Places	23,115,021	21,101,511	0.91
Special Foodservices	4,707,295	56,161	0.01
Drinking Places -Alcoholic Beverages	2,287,863	405,002	0.18
Foodservice & Drinking Places	55,477,596	23,947,137	0.43

Site	Address	Analysis Geography
Site 3	Lemoore Ave & Hanford-Armona Rd Lemoore, CA 93245	13 Minute Trade Area

Sources and Methodology

Household demand estimates are derived by combining data from the Consumer Expenditures Survey by the Bureau of Labor Statistics with current household demographic estimates from Claritas. The demand estimates only account for household expenditures. Demand is defined as the estimated dollar amount spent by a household that resides in the area of analysis for a specified retail store type or merchandise line item.

Supply estimates are generated from the Census of Retail Trade, a component of the Economic Census. County-level sales tax data is allocated to low levels of geography using business sales estimates, business locations, and employee counts provided by Claritas' Business Facts® database. Supply includes all products sold at retail outlets in a specified area for a one-year period. Supply is defined as the estimated total retail sales for a retail store type or merchandise line item.

Source: Retail Market Power™ (Claritas).



Retail Leakage and Surplus Analysis

The Retail Leakage and Surplus Analysis examines the quantitative aspect of the community's retail opportunities. It is a guide to understanding retail opportunities but it is not an analysis that indicates unconditional opportunities. The analysis is sometimes called "a gap analysis" or "a supply and demand analysis" and can aid in the following:

- * Indicating how well the retail needs of local residents are being met
- * Uncovering unmet demand and possible opportunities
- * Understanding the strengths and weaknesses of the local retail sector
- * Measuring the difference between actual and potential retail sales

Understanding Retail Leakage

Retail leakage means that residents are spending more for products than local businesses capture. Retail sales leakage suggests that there is unmet demand in the trade area and that the community can support additional store space for that type of business.

However, retail leakage does not necessarily translate into opportunity. For example, there could be a strong competitor in a neighboring community that dominates the market for that type of product or store.

Understanding Retail Surplus

A retail surplus means that the community's trade area is capturing the local market plus attracting non-local shoppers. A retail surplus does not necessarily mean that the community cannot support additional business. Many communities have developed strong clusters of stores that have broad geographic appeal. Examples of these types of retailers include: sporting goods stores, home furnishing stores, restaurants, and other specialty operations that become destination retailers and draw customers from outside the trade area.

Examining the quantitative aspects (Leakage/Surplus) is only part of the evaluation of community's retail opportunities. Before any conclusions can be drawn about potential business expansion or recruitment opportunities, qualitative considerations such as trade area psychographics and buying habits must be analyzed in context of other market factors.

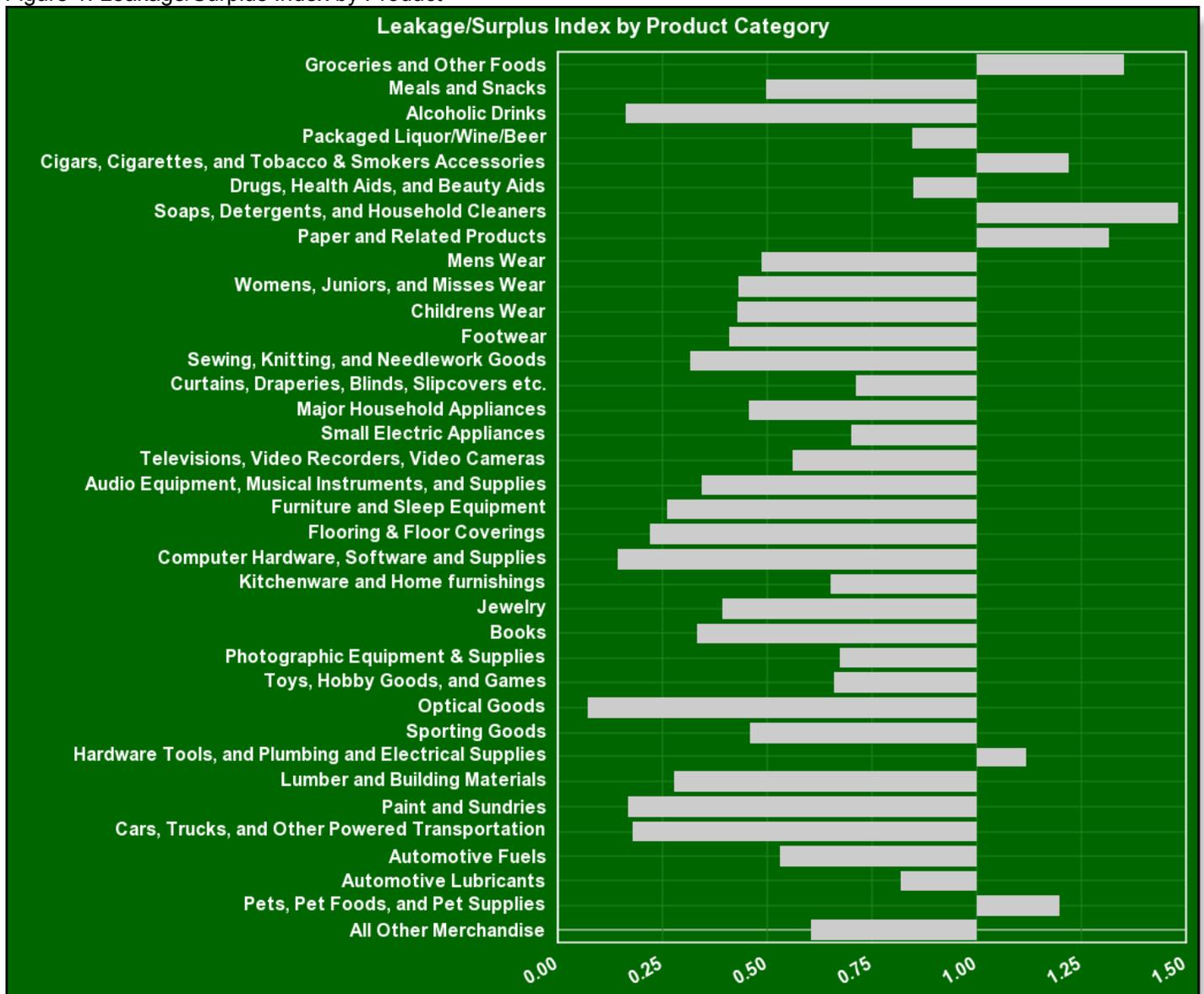
Site	Address	Analysis Geography
Site 4	City Center Lemoore, CA 93245	13 Minute Trade Area

Leakage/Surplus Index by Product

The Leakage/Surplus Index provides a relative comparison of the supply and demand across retail product categories. It is calculated by dividing actual sales by potential sales. An index greater than 1.0 means that the community is attracting retail sales (surplus) from outside the trade area. If the index is less than 1.0 it means that out-shopping is taking place and the community is not successfully drawing its own residents.

Leakage/Surplus Index (Figure 1) shows the strengths and weaknesses of a community's retail market by product.

Figure 1. Leakage/Surplus Index by Product



Site	Address	Analysis Geography
Site 4	City Center Lemoore, CA 93245	13 Minute Trade Area

The sales potential and the actual sales potential by product category and the resulting index are shown in Figure 2.

Figure 2. Sales Potential and Actual Sales by Product

Product Type	Potential	Actual Sales	Leakage/Surplus Index
Groceries and Other Foods	88,254,291	119,387,285	1.4
Meals and Snacks	54,673,636	27,227,588	0.5
Alcoholic Drinks	5,171,465	845,126	0.2
Packaged Liquor/Wine/Beer	9,402,409	7,973,881	0.8
Cigars, Cigarettes, and Tobacco & Smokers Accessories	7,710,021	9,411,922	1.2
Drugs, Health Aids, and Beauty Aids	28,916,263	24,592,967	0.9
Soaps, Detergents, and Household Cleaners	3,653,312	5,413,087	1.5
Paper and Related Products	3,987,386	5,255,386	1.3
Mens Wear	11,189,757	5,432,648	0.5
Womens, Juniors, and Misses Wear	21,159,141	9,143,498	0.4
Childrens Wear	7,467,495	3,214,593	0.4
Footwear	9,344,538	3,845,426	0.4
Sewing, Knitting, and Needlework Goods	1,008,513	316,830	0.3
Curtains, Draperies, Blinds, Slipcovers etc.	3,195,595	2,271,930	0.7
Major Household Appliances	3,773,136	1,718,735	0.5
Small Electric Appliances	1,728,025	1,210,103	0.7
Televisions, Video Recorders, Video Cameras	4,222,136	2,364,950	0.6
Audio Equipment, Musical Instruments, and Supplies	6,842,273	2,351,543	0.3
Furniture and Sleep Equipment	8,785,648	2,289,499	0.3
Flooring & Floor Coverings	3,316,486	727,730	0.2
Computer Hardware, Software and Supplies	11,825,144	1,691,565	0.1
Kitchenware and Home furnishings	6,355,258	4,145,773	0.7
Jewelry	5,393,467	2,126,280	0.4
Books	3,567,561	1,184,773	0.3
Photographic Equipment & Supplies	1,251,363	844,554	0.7
Toys, Hobby Goods, and Games	4,827,413	3,193,490	0.7
Optical Goods	1,088,657	76,016	0.1
Sporting Goods	6,728,338	3,088,172	0.5
Hardware Tools, and Plumbing and Electrical Supplies	28,599,819	32,024,774	1.1
Lumber and Building Materials	21,685,862	6,024,930	0.3
Paint and Sundries	3,326,016	560,422	0.2
Cars, Trucks, and Other Powered Transportation	88,836,648	15,931,459	0.2
Automotive Fuels	47,833,962	25,371,815	0.5
Automotive Lubricants	18,089,436	14,866,187	0.8
Pets, Pet Foods, and Pet Supplies	2,364,466	2,833,621	1.2
All Other Merchandise	15,999,047	9,688,825	0.6

Site	Address	Analysis Geography
Site 4	City Center Lemoore, CA 93245	13 Minute Trade Area

Leakage/Surplus Index by Major Store Type

The quantitative comparison of retail leakage and surplus in the twelve major store types shown in the chart and table below provides an initial measure of market opportunities. Combining this analysis with the knowledge of the local retail situation will take the process of identifying retail possibilities one step further.

Figure 3 provides the leakage/surplus indices and following is the sales potential and actual sales for major store types.

Figure 3. Leakage/Surplus Index and Actual and Potential Sales by Major Store Types



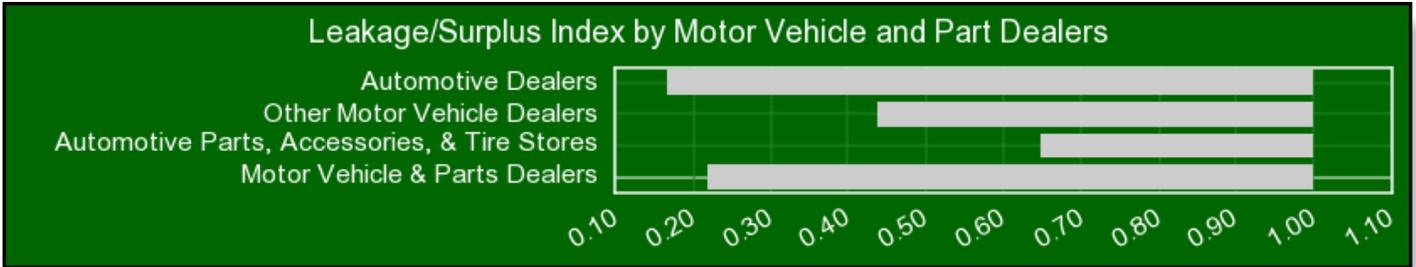
Store Type	Potential	Actual Sales	Leakage/Surplus Index
Motor Vehicle & Parts Dealers	110,155,983	24,119,374	0.22
Furniture & Home Furnishings Stores	12,391,950	1,844,103	0.15
Electronics & Appliances Stores	12,783,939	5,564,505	0.44
Building Material & Garden Equipment & Supply Dealers	50,433,875	36,016,052	0.71
Food & Beverage Stores	72,642,354	131,099,961	1.80
Health & Personal Care Stores	22,868,003	10,840,572	0.47
Clothing & Clothing Accessories Stores	27,276,537	4,491,492	0.16
Sporting Goods, Hobby, Book, & Music Stores	10,418,845	1,316,367	0.13
General Merchandise Stores	68,117,757	68,099,393	1.00
Miscellaneous Store Retailers	12,981,758	5,901,883	0.45
Foodservice & Drinking Places	55,394,147	25,128,947	0.45
GAFO	136,056,921	83,577,433	0.61
Total Retail Sales (Including Food Service & Drinking Places)	551,573,979	358,647,426	0.65

* GAFO refers to discount retailers that typically include the following departments: general merchandise; clothing and clothing accessories; furniture and home furnishings; electronics and appliances; sporting goods, hobby, books and music; and office supplies.

Site	Address	Analysis Geography
Site 4	City Center Lemoore, CA 93245	13 Minute Trade Area

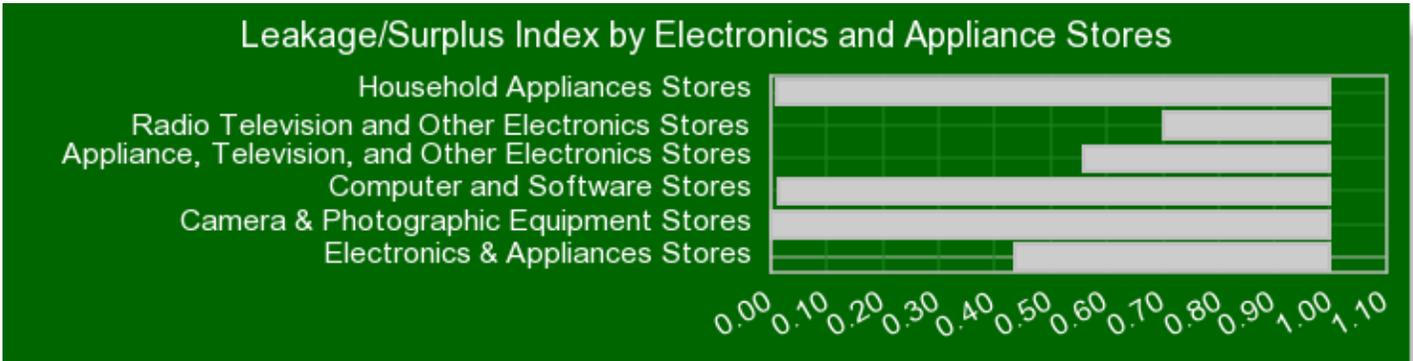
Leakage/Surplus Analysis by Sub-Categories of Major Retail Types

Additional leakage/surplus details are provided on subcategories of stores in each of the twelve major store types. These details can help further identify possible business expansion opportunities.



Motor Vehicle and Parts Dealers	Potential	Actual Sales	Leakage/Surplus Index
Automotive Dealers	95,412,659	15,915,068	0.17
Other Motor Vehicle Dealers	6,335,145	2,768,613	0.44
Automotive Parts, Accessories, & Tire Stores	8,408,177	5,435,692	0.65
Motor Vehicle & Parts Dealers	110,155,983	24,119,374	0.22

Site	Address	Analysis Geography
Site 4	City Center Lemoore, CA 93245	13 Minute Trade Area



Electronics and Appliance Stores	Potential	Actual Sales	Leakage/Surplus Index
Household Appliances Stores	1,991,145	18,926	0.01
Radio Television and Other Electronics Stores	7,865,026	5,513,073	0.70
Appliance, Television, and Other Electronics Stores	9,856,171	5,531,999	0.56
Computer and Software Stores	2,454,529	32,506	0.01
Camera & Photographic Equipment Stores	473,239	0	0.00
Electronics & Appliances Stores	12,783,939	5,564,505	0.44

Site	Address	Analysis Geography
Site 4	City Center Lemoore, CA 93245	13 Minute Trade Area



Furniture and Home Furnishings Stores	Potential	Actual Sales	Leakage/Surplus Index
Furniture Stores	7,015,526	961,350	0.14
Home Furnishing Stores	5,376,424	882,753	0.16
Furniture & Home Furnishings Stores	12,391,950	1,844,103	0.15

Site	Address	Analysis Geography
Site 4	City Center Lemoore, CA 93245	13 Minute Trade Area



Building Material, Garden Equipment and Supply Dealers	Potential	Actual Sales	Leakage/Surplus Index
Home Centers	18,579,675	0	0.00
Paint and Wallpaper Stores	1,031,705	40,315	0.04
Hardware Stores	4,040,473	2,402,300	0.59
Building Materials, Lumberyards	7,739,257	2,952,552	0.38
Other Building Materials Dealers	22,554,709	8,658,241	0.38
Building Material & Supply Dealers	46,206,563	11,100,856	0.24
Outdoor Power Equipment Stores	620,427	0	0.00
Nursery and Garden Centers	3,606,884	24,915,196	6.91
Lawn and Garden Equipment and Supplies Stores	4,227,312	24,915,196	5.89
Building Material & Garden Equipment & Supply Dealers	50,433,875	36,016,052	0.71

Site	Address	Analysis Geography
Site 4	City Center Lemoore, CA 93245	13 Minute Trade Area



Food and Beverage Stores	Potential	Actual Sales	Leakage/Surplus Index
Supermarkets and Other Grocery (except Convenience) Stores	63,175,160	117,877,355	1.87
Convenience Stores	3,139,173	11,212,206	3.57
Grocery Stores	66,314,333	129,089,561	1.95
Specialty Food Stores	2,190,287	657,786	0.30
Beer, Wine, & Liquor Stores	4,137,733	1,352,613	0.33
Food & Beverage Stores	72,642,354	131,099,961	1.80

Site	Address	Analysis Geography
Site 4	City Center Lemoore, CA 93245	13 Minute Trade Area



Health and Personal Care Stores	Potential	Actual Sales	Leakage/Surplus Index
Pharmacies and Drug Stores	19,794,127	10,248,512	0.52
Cosmetics, Beauty Supplies and Perfume Stores	750,345	170,355	0.23
Optical Goods Stores	912,663	0	0.00
Other Health and Personal Care Stores	1,410,867	421,705	0.30
Health & Personal Care Stores	22,868,003	10,840,572	0.47

Site	Address	Analysis Geography
Site 4	City Center Lemoore, CA 93245	13 Minute Trade Area



Clothing and Clothing Accessories Stores	Potential	Actual Sales	Leakage/Surplus Index
Mens Clothing Stores	1,264,064	0	0.00
Womens Clothing Stores	5,012,998	995,108	0.20
Childrens and Infants Clothing Stores	1,389,381	0	0.00
Family Clothing Stores	10,703,219	1,599,179	0.15
Clothing Accessories Stores	410,576	77,912	0.19
Other Clothing Stores	1,272,121	577,984	0.45
Clothing Stores	20,052,362	3,250,183	0.16
Shoe Stores	3,976,838	926,147	0.23
Jewelry Stores	2,979,423	315,161	0.11
Luggage, & Leather Goods Stores	267,913	0	0.00
Jewelry, Luggage, & Leather Goods Stores	3,247,336	315,161	0.10
Clothing & Clothing Accessories Stores	27,276,537	4,491,492	0.16

Site	Address	Analysis Geography
Site 4	City Center Lemoore, CA 93245	13 Minute Trade Area



Sporting Goods, Hobby, Book and Music Stores	Potential	Actual Sales	Leakage/Surplus Index
Sporting Goods Stores	3,412,070	171,684	0.05
Hobby, Toys and Games Stores	2,236,249	1,094,072	0.49
Sew/Needlework/Piece Goods Stores	587,011	0	0.00
Musical Instrument and Supplies Stores	753,248	0	0.00
Sporting Goods, Hobby, & Musical Instrument Stores	6,988,580	1,265,757	0.18
Book Stores	2,132,842	50,610	0.02
News Dealers and Newsstands	99,005	0	0.00
Book Stores and News Dealers	2,231,847	50,610	0.02
Prerecorded Tape, Compact Disc, and Record Stores	1,198,417	0	0.00
Book, Periodical, & Music Stores	3,430,264	50,610	0.01
Sporting Goods, Hobby, Book, & Music Stores	10,418,845	1,316,367	0.13

Site	Address	Analysis Geography
Site 4	City Center Lemoore, CA 93245	13 Minute Trade Area



General Merchandise Stores	Potential	Actual Sales	Leakage/Surplus Index
Department Stores excluding leased depts.	31,916,996	30,207,015	0.95
Warehouse Clubs and Super Stores	31,438,575	30,848,096	0.98
All Other General Merchandise Stores	4,762,185	7,044,282	1.48
Other General Merchandise Stores	36,200,761	37,892,378	1.05
General Merchandise Stores	68,117,757	68,099,393	1.00

Site	Address	Analysis Geography
Site 4	City Center Lemoore, CA 93245	13 Minute Trade Area



Miscellaneous Store Retailers	Potential	Actual Sales	Leakage/Surplus Index
Florists	885,419	622,902	0.70
Office Supplies and Stationery Stores	2,848,793	824,694	0.29
Gift, Novelty, and Souvenir Stores	2,219,096	1,436,876	0.65
Office Supplies, Stationery, & Gift Stores	5,067,890	2,261,570	0.45
Used Merchandise Stores	1,173,286	1,234,386	1.05
Other Miscellaneous Store Retailers	5,855,162	1,783,023	0.30
Miscellaneous Store Retailers	12,981,758	5,901,883	0.45

Site	Address	Analysis Geography
Site 4	City Center Lemoore, CA 93245	13 Minute Trade Area



Foodservice and Drinking Places	Potential	Actual Sales	Leakage/Surplus Index
Full-service Restaurants	25,328,213	2,384,463	0.09
Limited-service Eating Places	23,083,032	22,285,590	0.97
Special Foodservices	4,700,641	53,892	0.01
Drinking Places -Alcoholic Beverages	2,282,259	405,002	0.18
Foodservice & Drinking Places	55,394,147	25,128,947	0.45

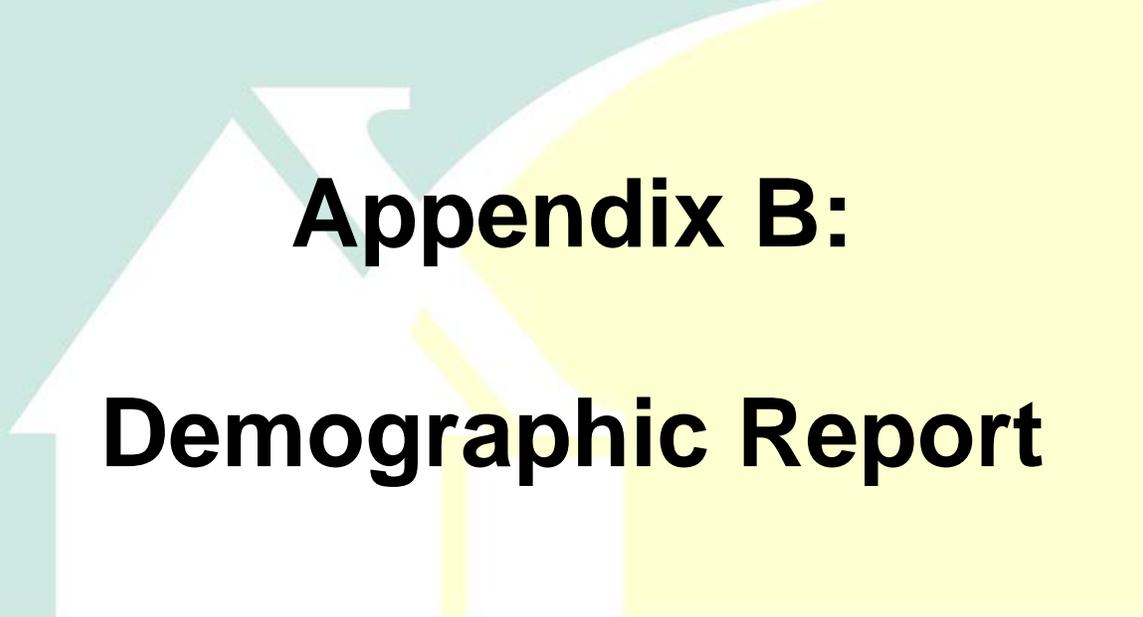
Site	Address	Analysis Geography
Site 4	City Center Lemoore, CA 93245	13 Minute Trade Area

Sources and Methodology

Household demand estimates are derived by combining data from the Consumer Expenditures Survey by the Bureau of Labor Statistics with current household demographic estimates from Claritas. The demand estimates only account for household expenditures. Demand is defined as the estimated dollar amount spent by a household that resides in the area of analysis for a specified retail store type or merchandise line item.

Supply estimates are generated from the Census of Retail Trade, a component of the Economic Census. County-level sales tax data is allocated to low levels of geography using business sales estimates, business locations, and employee counts provided by Claritas' Business Facts® database. Supply includes all products sold at retail outlets in a specified area for a one-year period. Supply is defined as the estimated total retail sales for a retail store type or merchandise line item.

Source: Retail Market Power™ (Claritas).



Appendix B:
Demographic Report

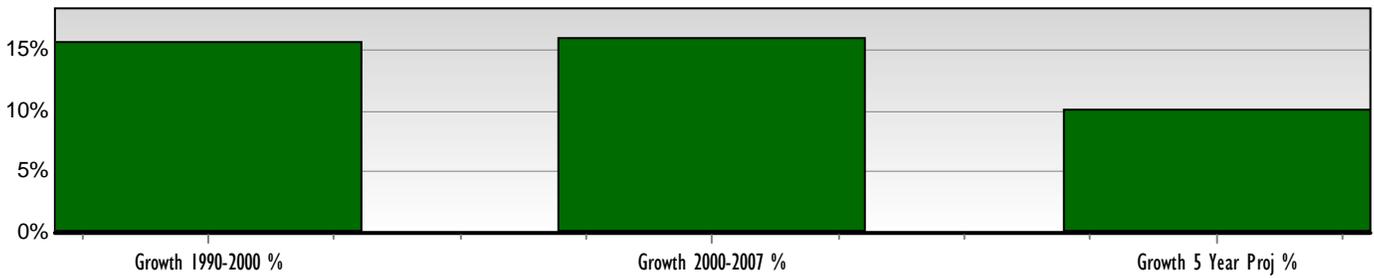
Analysis Geography: Hwy 41 & Bush St
Lemoore, CA

Date: 2/2/2009

Population Profile

	Site I
2012 Projection	45,983
2007 Estimate	41,737
2000 Census	35,970
1990 Census	31,073

Population Change



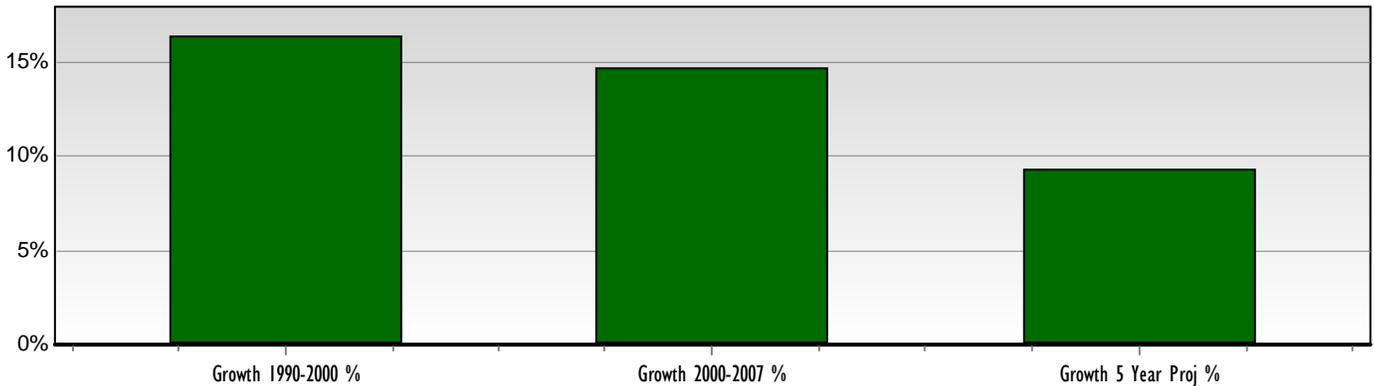
Work Place Population

	Site I
Total	26,814

Household Profile

2012 Projection	13,551
2007 Estimate	12,398
2000 Census	10,816
1990 Census	9,297

Household Change

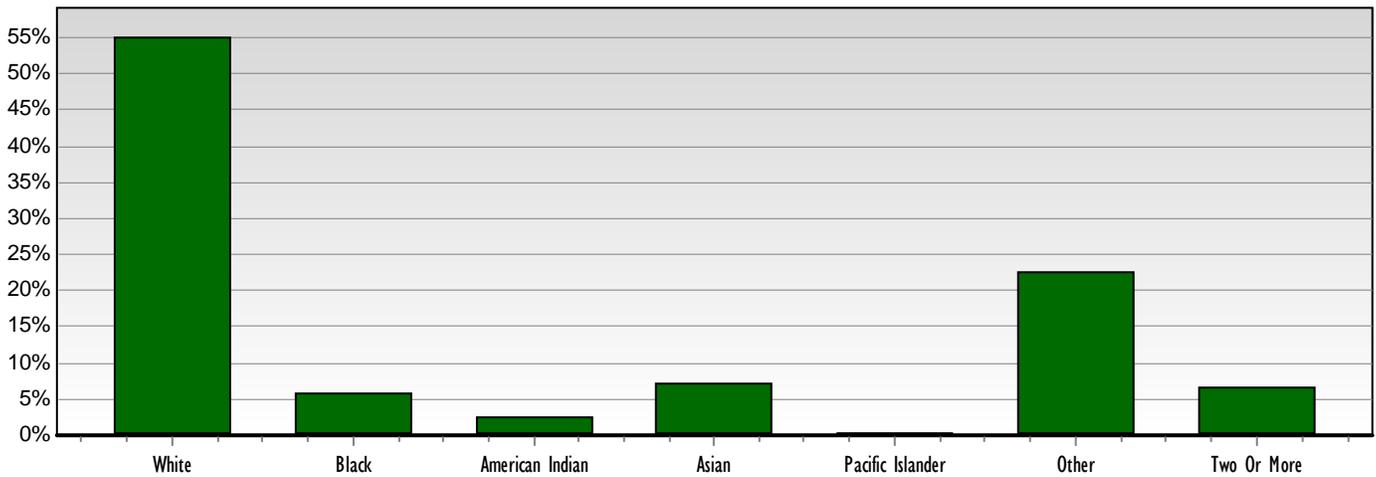


Analysis Geography: Hwy 41 & Bush St
Lemoore, CA

Date: 2/2/2009

	Site
Population By Race (Current)	1
White	22,961
Black	2,378
American Indian	1,075
Asian	2,976
Pacific Islander	154
Other	9,461
Two Or More	2,732
Total Population By Race	41,737

Population By Race (Current)



	Site
Population By Hispanic Origin (Current)	1
Hispanic Origin	16,461
Non Hispanic Origin	25,276

Analysis Geography: Hwy 41 & Bush St
Lemoore, CA

Date: 2/2/2009

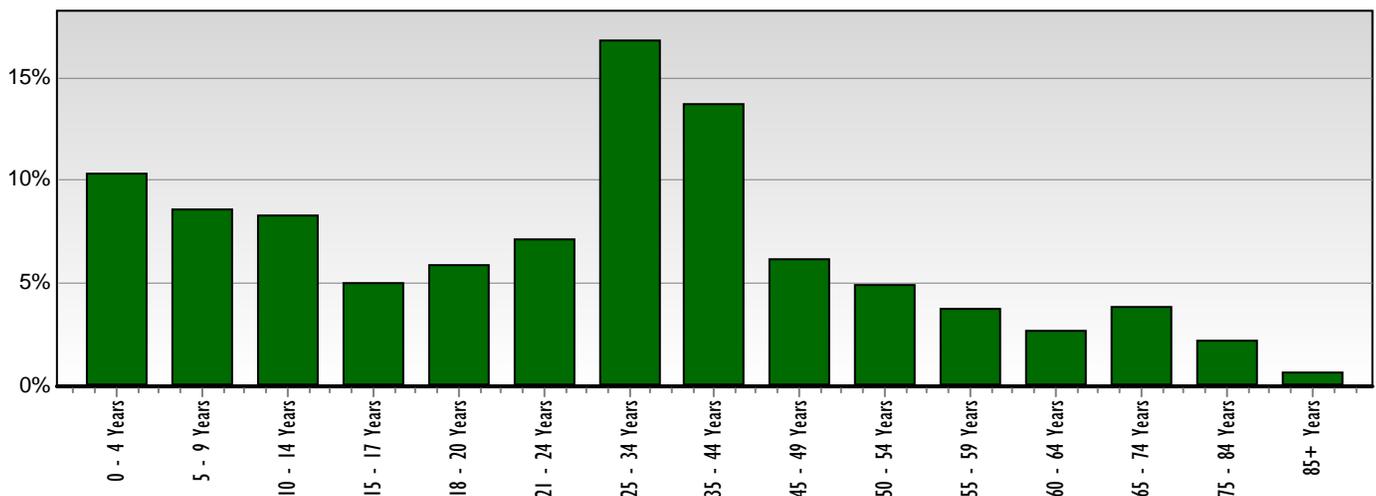
Population By Age (Current)

	Site
0 to 4 years	4,295
5 to 9 years	3,578
10 to 14 years	3,457
15 to 17 years	2,101
18 to 20 years	2,473
21 to 24 years	2,991
25 to 34 years	7,013
35 to 44 years	5,732
45 to 49 years	2,569
50 to 54 years	2,063
55 to 59 years	1,567
60 to 64 years	1,116
65 to 74 years	1,601
75 to 84 years	918
85+ Years	263

Total Population By Age

Average Age	30.4
Median Age	28.5

Population By Age (Current)

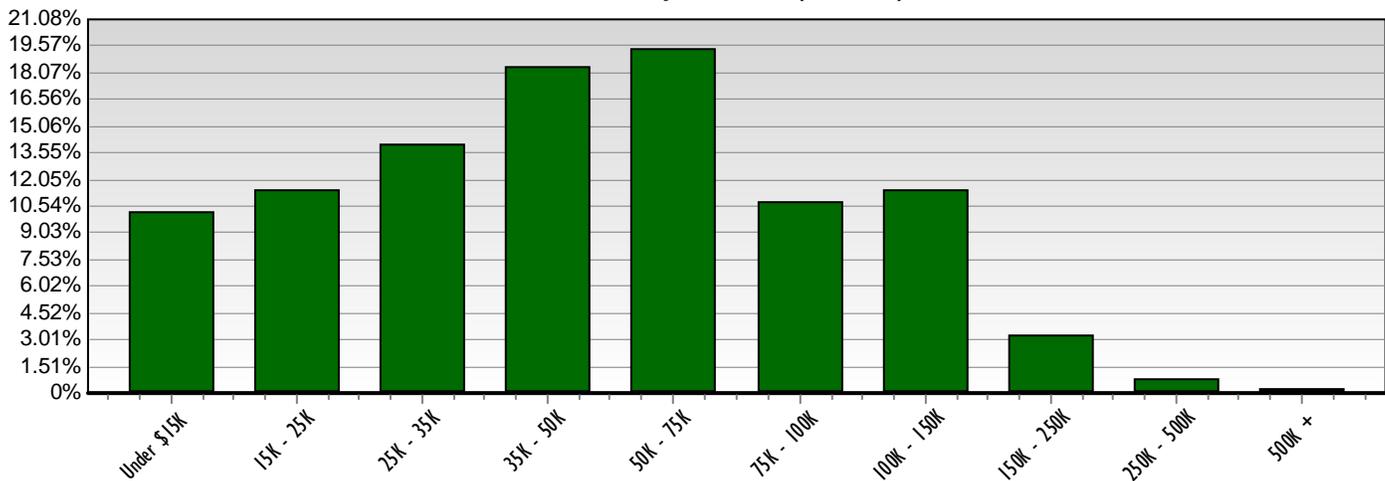


Analysis Geography: Hwy 41 & Bush St
Lemoore, CA

Date: 2/2/2009

Households By Income (Current)	Site
Under \$15,000	1,266
\$15,000 to \$24,999	1,416
\$25,000 to \$34,999	1,743
\$35,000 to \$49,999	2,278
\$50,000 to \$74,999	2,405
\$75,000 to \$99,999	1,340
\$100,000 to \$149,999	1,420
\$150,000 to \$249,999	402
\$250,000 to \$499,999	99
\$500,000 +	29
Total Households By Income	12,398
Average Household Income	\$60,610
Per Capita Income	\$19,805
Median Household Income	\$50,237

Households By Income (Current)

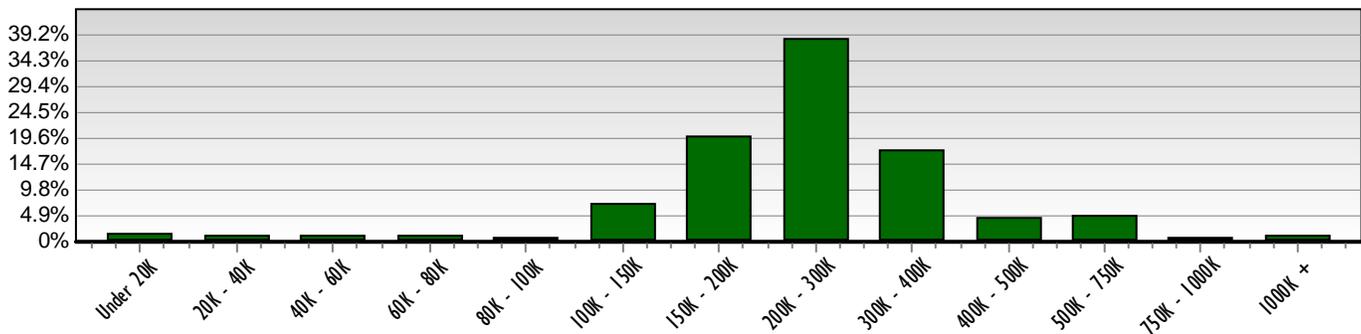


Analysis Geography: Hwy 41 & Bush St
Lemoore, CA

Date: 2/2/2009

	Site
Housing Units By Occupancy (Current)	
Owner - Occupied	49.1%
Renter - Occupied	45.5%
Vacant	5.4%
Owner - Occupied Property Values (Current)	
Under \$20,000	105
\$20,000 to \$39,999	80
\$40,000 to \$59,999	61
\$60,000 to \$79,999	80
\$80,000 to \$99,999	59
\$100,000 to \$149,999	457
\$150,000 to \$199,999	1,280
\$200,000 to \$299,999	2,475
\$300,000 to \$399,999	1,123
\$400,000 to \$499,999	288
\$500,000 to \$749,999	309
\$750,000 to \$999,999	56
\$1,000,000 +	64
Total Owner - Occupied Property Values	6,437
Median Property Value	246,977

Owner - Occupied Property Values (Current)



Analysis Geography: Hwy 198 & 19th Ave
Lemoore, CA

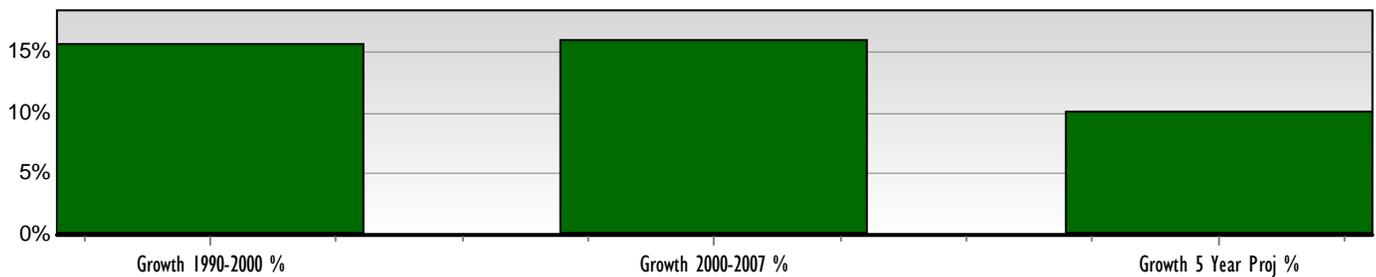
Date: 2/2/2009

Population Profile

Site
2

2012 Projection	45,983
2007 Estimate	41,737
2000 Census	35,970
1990 Census	31,073

Population Change



Work Place Population

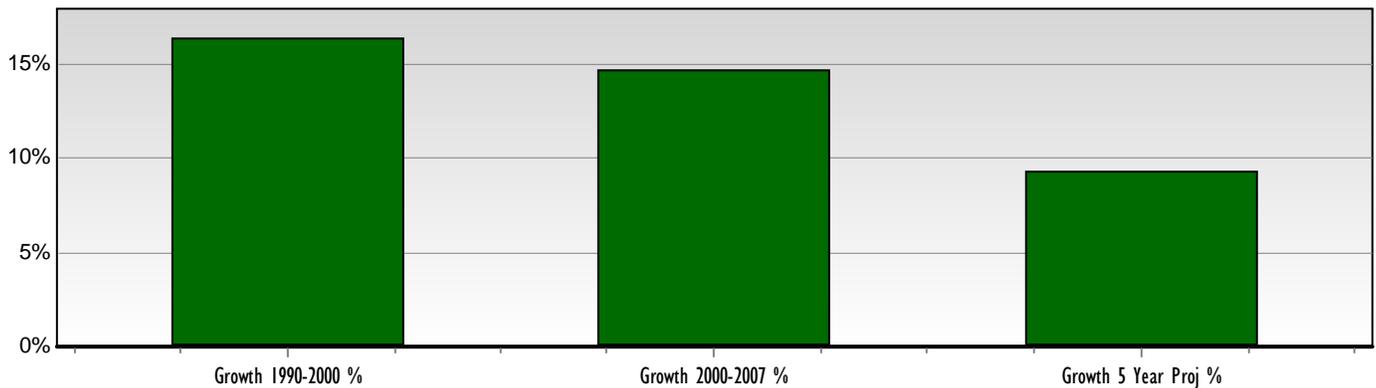
Site
2

Total	26,814
-------	--------

Household Profile

2012 Projection	13,551
2007 Estimate	12,398
2000 Census	10,816
1990 Census	9,297

Household Change

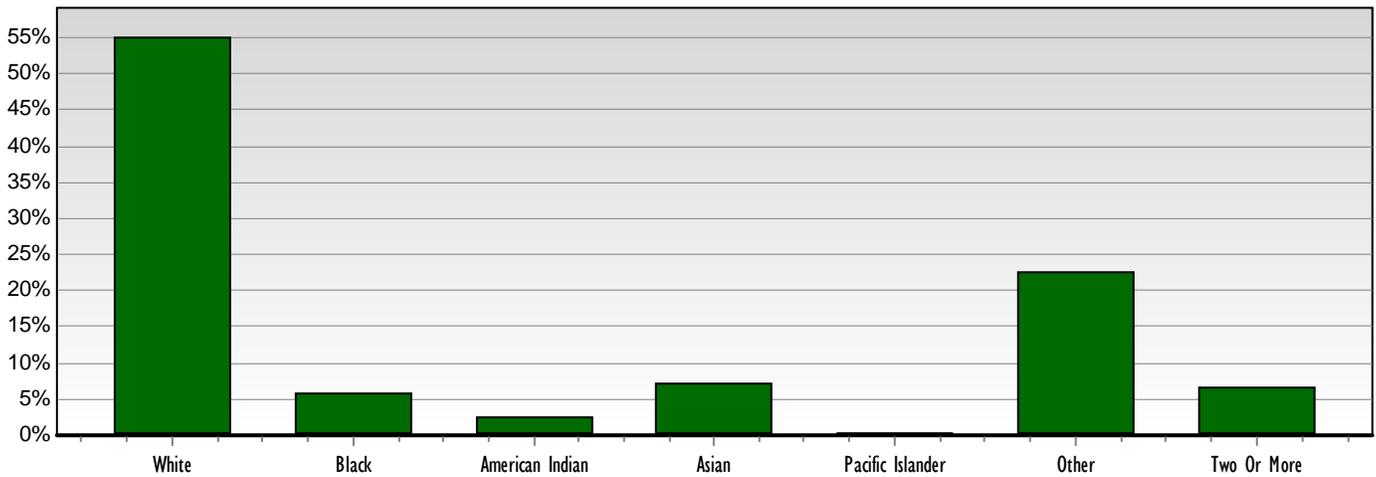


Analysis Geography: Hwy 198 & 19th Ave
Lemoore, CA

Date: 2/2/2009

	Site
Population By Race (Current)	2
White	22,961
Black	2,378
American Indian	1,075
Asian	2,976
Pacific Islander	154
Other	9,461
Two Or More	2,732
Total Population By Race	41,737

Population By Race (Current)



	Site
Population By Hispanic Origin (Current)	2
Hispanic Origin	16,461
Non Hispanic Origin	25,276

Analysis Geography: Hwy 198 & 19th Ave
Lemoore, CA

Date: 2/2/2009

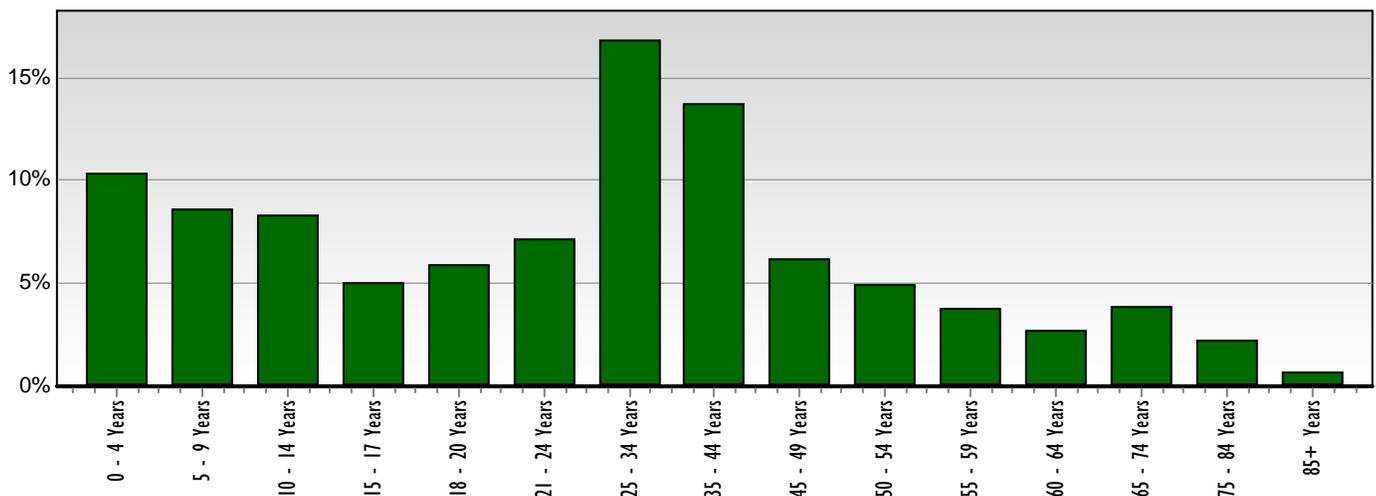
Population By Age (Current)

	Site 2
0 to 4 years	4,295
5 to 9 years	3,578
10 to 14 years	3,457
15 to 17 years	2,101
18 to 20 years	2,473
21 to 24 years	2,991
25 to 34 years	7,013
35 to 44 years	5,732
45 to 49 years	2,569
50 to 54 years	2,063
55 to 59 years	1,567
60 to 64 years	1,116
65 to 74 years	1,601
75 to 84 years	918
85+ Years	263

Total Population By Age

Average Age	30.4
Median Age	28.5

Population By Age (Current)

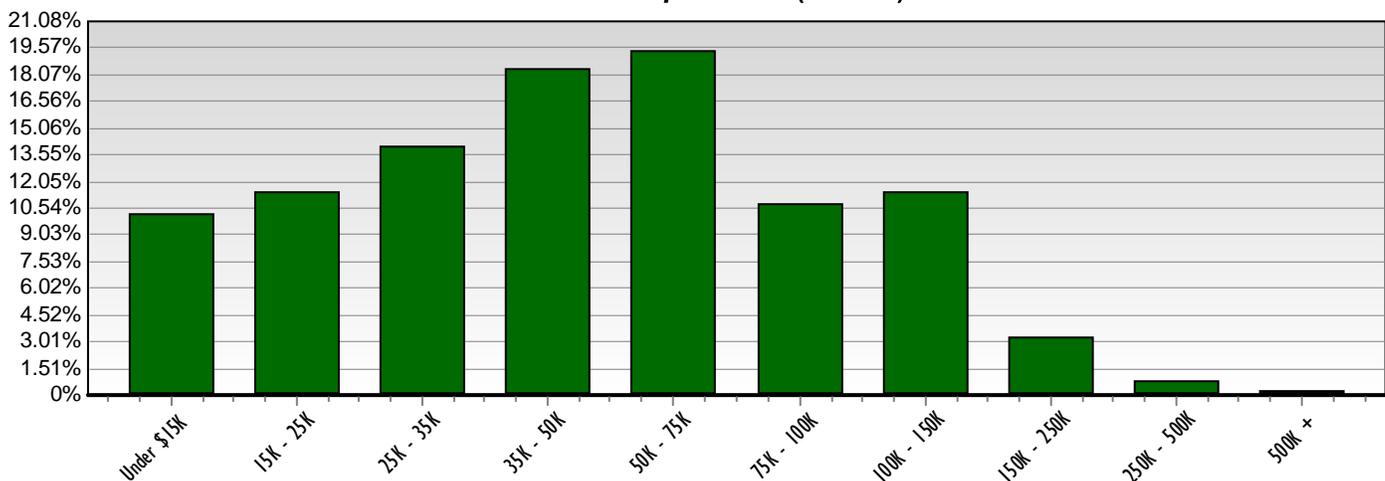


Analysis Geography: Hwy 198 & 19th Ave
Lemoore, CA

Date: 2/2/2009

Households By Income (Current)	Site
	2
Under \$15,000	1,266
\$15,000 to \$24,999	1,416
\$25,000 to \$34,999	1,743
\$35,000 to \$49,999	2,278
\$50,000 to \$74,999	2,405
\$75,000 to \$99,999	1,340
\$100,000 to \$149,999	1,420
\$150,000 to \$249,999	402
\$250,000 to \$499,999	99
\$500,000 +	29
Total Households By Income	12,398
Average Household Income	\$60,610
Per Capita Income	\$19,805
Median Household Income	\$50,237

Households By Income (Current)

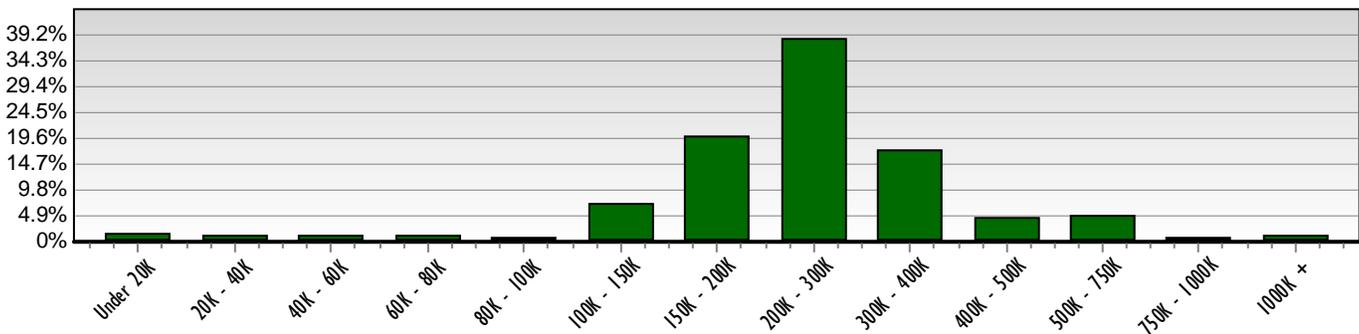


Analysis Geography: Hwy 198 & 19th Ave
Lemoore, CA

Date: 2/2/2009

	Site
Housing Units By Occupancy (Current)	2
Owner - Occupied	49.1%
Renter - Occupied	45.5%
Vacant	5.4%
Owner - Occupied Property Values (Current)	
Under \$20,000	105
\$20,000 to \$39,999	80
\$40,000 to \$59,999	61
\$60,000 to \$79,999	80
\$80,000 to \$99,999	59
\$100,000 to \$149,999	457
\$150,000 to \$199,999	1,280
\$200,000 to \$299,999	2,475
\$300,000 to \$399,999	1,123
\$400,000 to \$499,999	288
\$500,000 to \$749,999	309
\$750,000 to \$999,999	56
\$1,000,000 +	64
Total Owner - Occupied Property Values	6,437
Median Property Value	246,977

Owner - Occupied Property Values (Current)



Analysis Geography: Lemoore Ave & Hanford-Armona Rd
Lemoore, CA

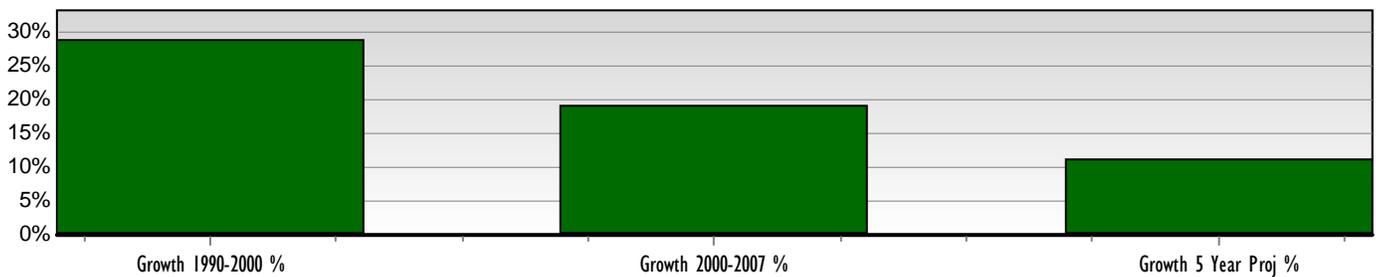
Date: 2/2/2009

Population Profile

Site
3

2012 Projection	39,180
2007 Estimate	35,188
2000 Census	29,526
1990 Census	22,907

Population Change



Work Place Population

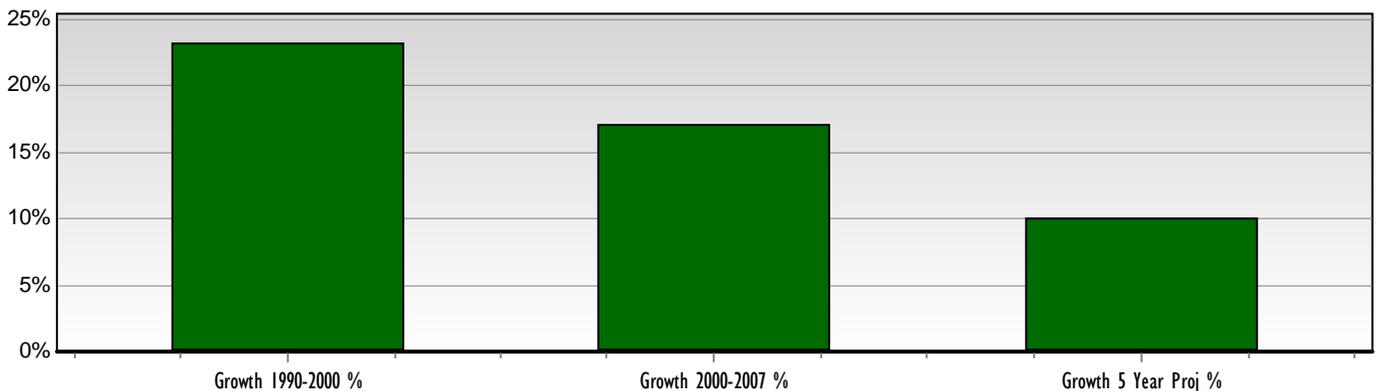
Site
3

Total	16,827
-------	--------

Household Profile

2012 Projection	12,092
2007 Estimate	10,986
2000 Census	9,387
1990 Census	7,621

Household Change

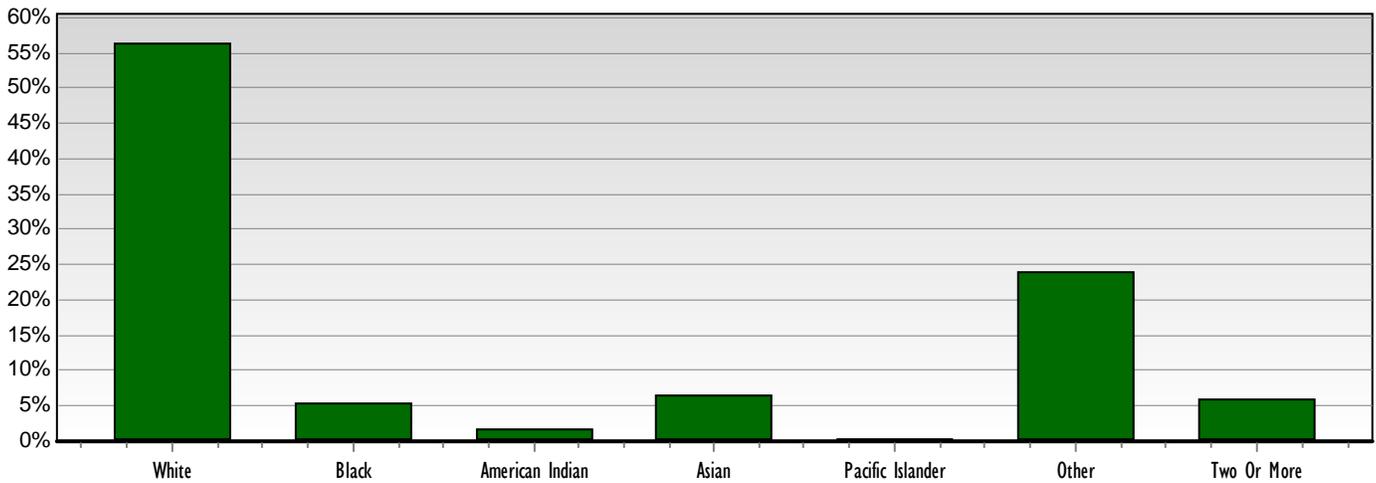


Analysis Geography: Lemoore Ave & Hanford-Armona Rd
Lemoore, CA

Date: 2/2/2009

	Site
Population By Race (Current)	3
White	19,805
Black	1,883
American Indian	587
Asian	2,305
Pacific Islander	112
Other	8,420
Two Or More	2,076
Total Population By Race	35,188

Population By Race (Current)



	Site
Population By Hispanic Origin (Current)	3
Hispanic Origin	14,631
Non Hispanic Origin	20,557

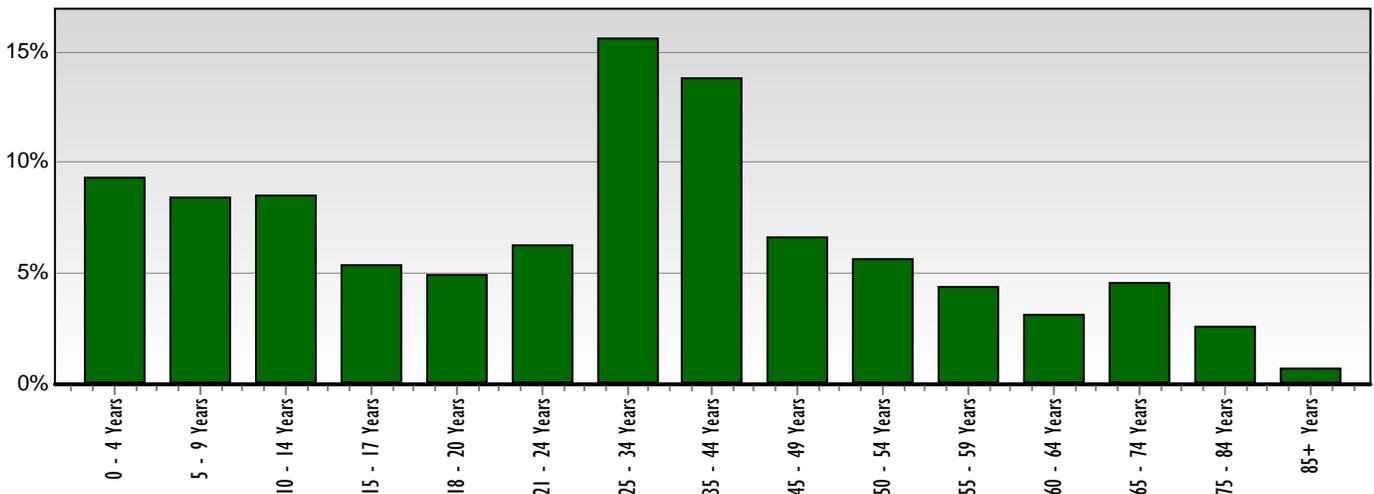
Analysis Geography: Lemoore Ave & Hanford-Armona Rd
Lemoore, CA

Date: 2/2/2009

Population By Age (Current)	Site
	3
0 to 4 years	3,287
5 to 9 years	2,960
10 to 14 years	2,997
15 to 17 years	1,903
18 to 20 years	1,735
21 to 24 years	2,196
25 to 34 years	5,490
35 to 44 years	4,859
45 to 49 years	2,328
50 to 54 years	1,993
55 to 59 years	1,551
60 to 64 years	1,106
65 to 74 years	1,598
75 to 84 years	917
85+ Years	268

Total Population By Age	35,188
Average Age	31.9
Median Age	29.7

Population By Age (Current)

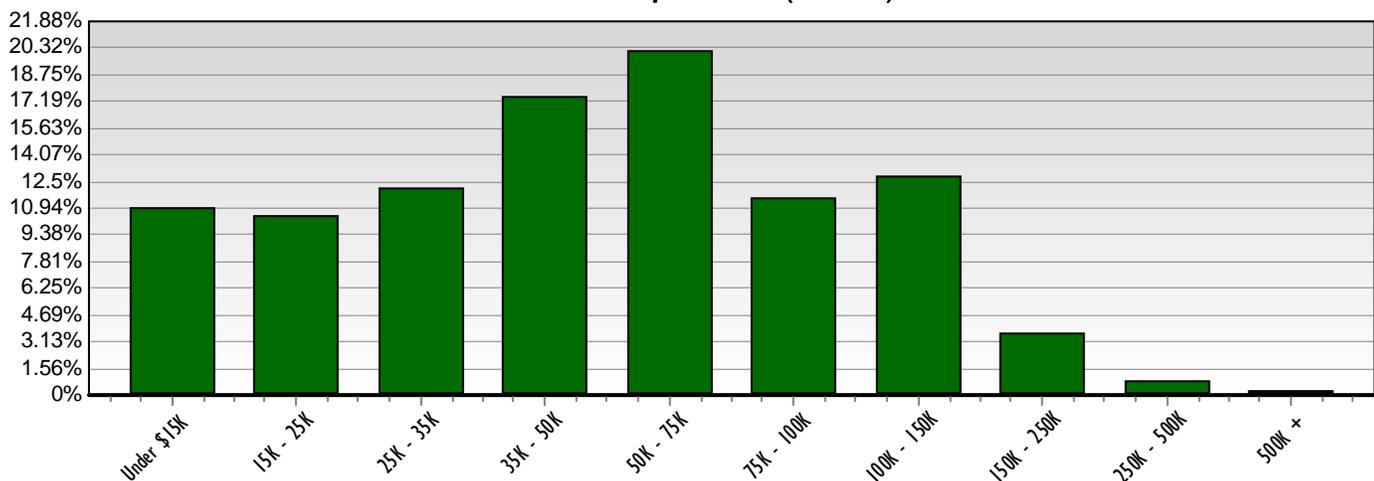


Analysis Geography: Lemoore Ave & Hanford-Armona Rd
Lemoore, CA

Date: 2/2/2009

Households By Income (Current)	Site
	3
Under \$15,000	1,198
\$15,000 to \$24,999	1,154
\$25,000 to \$34,999	1,324
\$35,000 to \$49,999	1,915
\$50,000 to \$74,999	2,212
\$75,000 to \$99,999	1,262
\$100,000 to \$149,999	1,409
\$150,000 to \$249,999	397
\$250,000 to \$499,999	88
\$500,000 +	27
Total Households By Income	10,986
Average Household Income	\$62,953
Per Capita Income	\$20,807
Median Household Income	\$52,705

Households By Income (Current)



Analysis Geography: Lemoore Ave & Hanford-Armona Rd
Lemoore, CA

Date: 2/2/2009

Housing Units By Occupancy (Current) **Site**
3

Owner - Occupied	55.1%
Renter - Occupied	39.6%
Vacant	5.3%

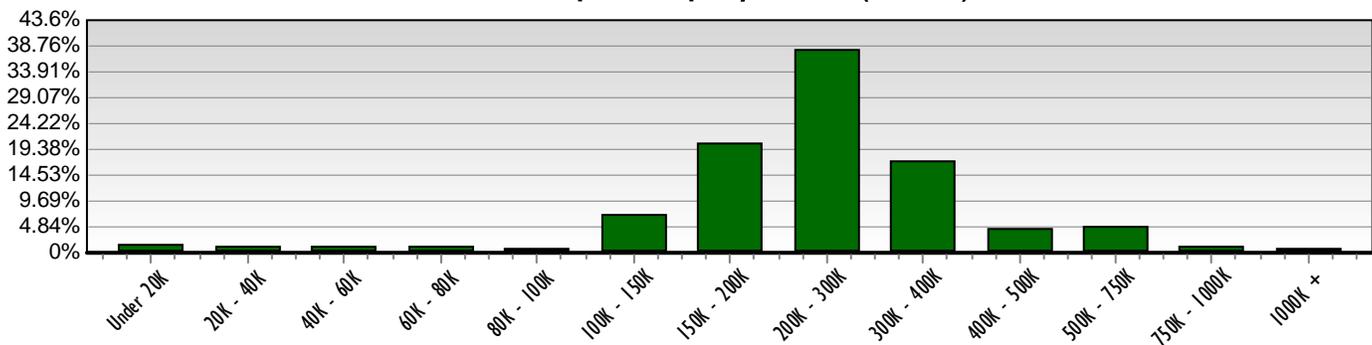
Owner - Occupied Property Values (Current)

Under \$20,000	88
\$20,000 to \$39,999	77
\$40,000 to \$59,999	75
\$60,000 to \$79,999	80
\$80,000 to \$99,999	57
\$100,000 to \$149,999	452
\$150,000 to \$199,999	1,315
\$200,000 to \$299,999	2,430
\$300,000 to \$399,999	1,106
\$400,000 to \$499,999	279
\$500,000 to \$749,999	318
\$750,000 to \$999,999	66
\$1,000,000 +	50

Total Owner - Occupied Property Values **6,393**

Median Property Value **242,471**

Owner - Occupied Property Values (Current)



Analysis Geography: City Center
Lemoore, CA

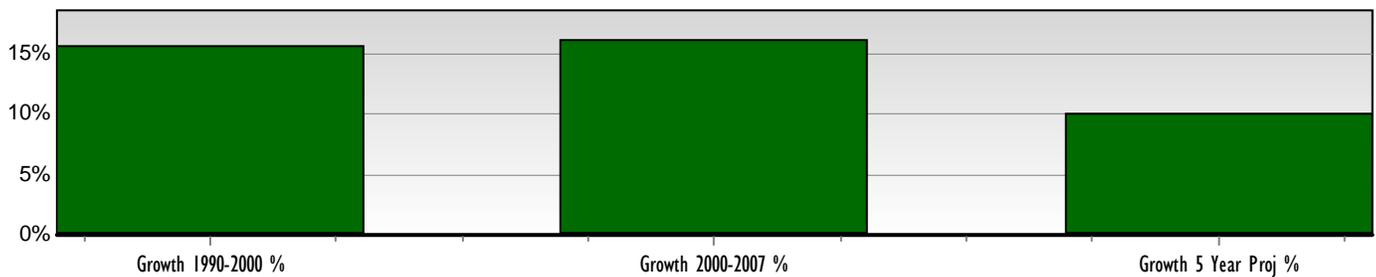
Date: 2/2/2009

Population Profile

Site
4

2012 Projection	46,824
2007 Estimate	42,523
2000 Census	36,608
1990 Census	31,669

Population Change



Work Place Population

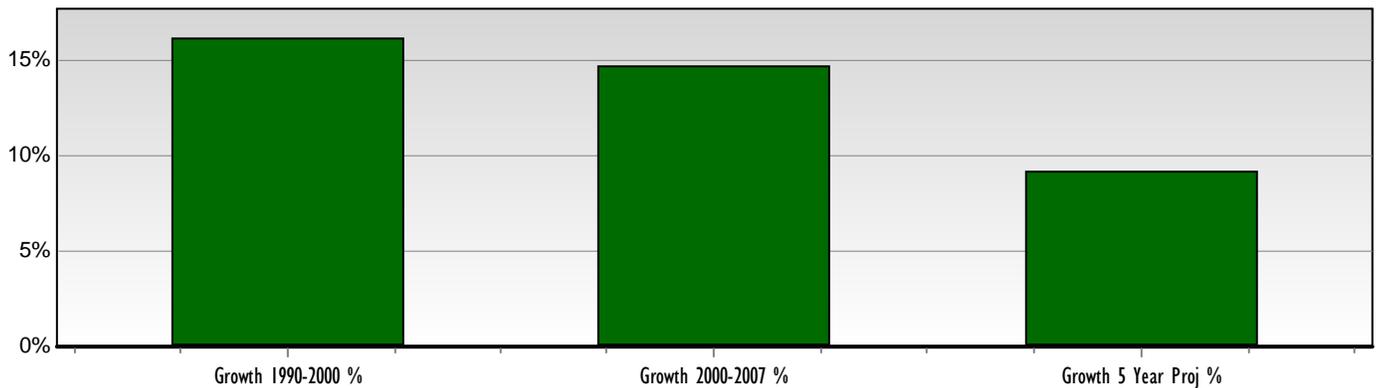
Site
4

Total	27,098
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Household Profile

2012 Projection	13,848
2007 Estimate	12,678
2000 Census	11,047
1990 Census	9,507

Household Change

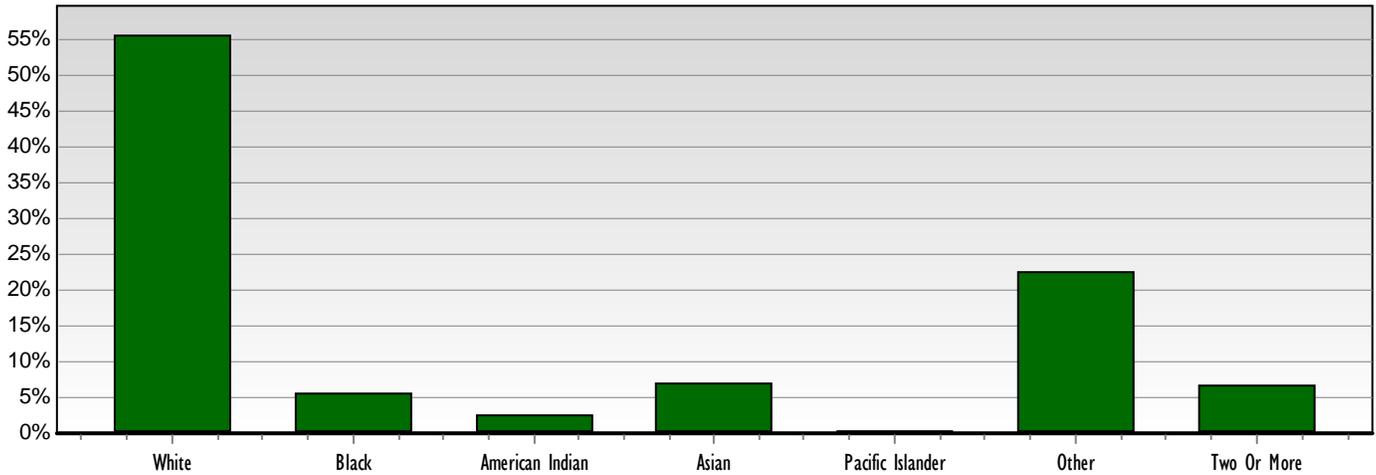


Analysis Geography: City Center
Lemoore, CA

Date: 2/2/2009

	Site
Population By Race (Current)	4
White	23,598
Black	2,380
American Indian	1,080
Asian	3,001
Pacific Islander	154
Other	9,524
Two Or More	2,786
Total Population By Race	42,523

Population By Race (Current)



	Site
Population By Hispanic Origin (Current)	4
Hispanic Origin	16,619
Non Hispanic Origin	25,904

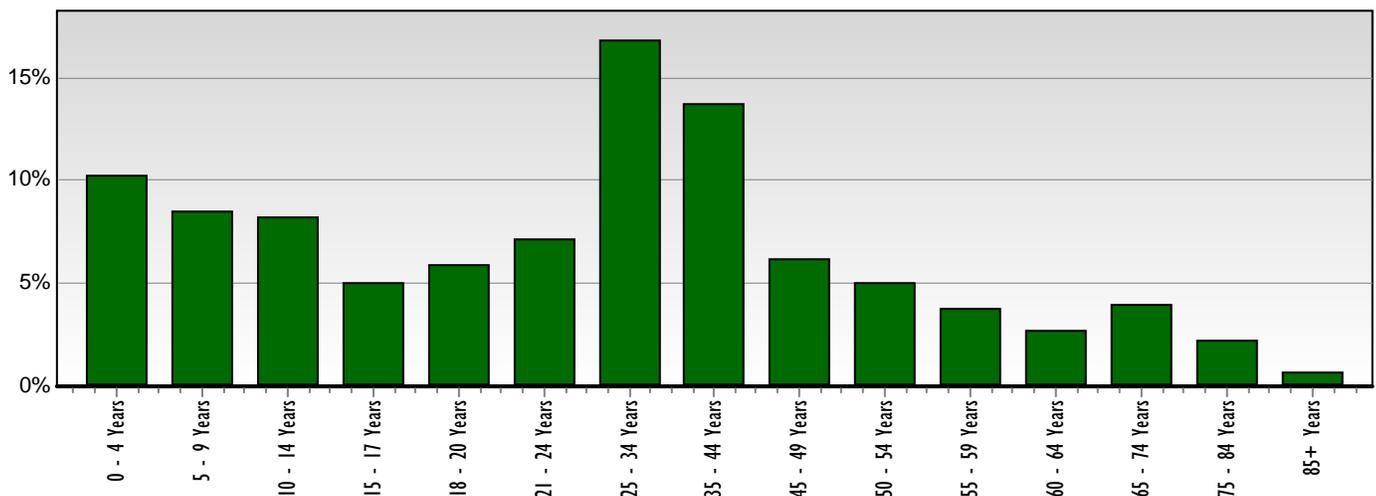
Analysis Geography: City Center
Lemoore, CA

Date: 2/2/2009

Population By Age (Current)	Site
	4
0 to 4 years	4,340
5 to 9 years	3,624
10 to 14 years	3,502
15 to 17 years	2,129
18 to 20 years	2,502
21 to 24 years	3,044
25 to 34 years	7,147
35 to 44 years	5,827
45 to 49 years	2,623
50 to 54 years	2,119
55 to 59 years	1,619
60 to 64 years	1,153
65 to 74 years	1,664
75 to 84 years	955
85+ Years	275

Total Population By Age	42,523
Average Age	30.5
Median Age	28.6

Population By Age (Current)

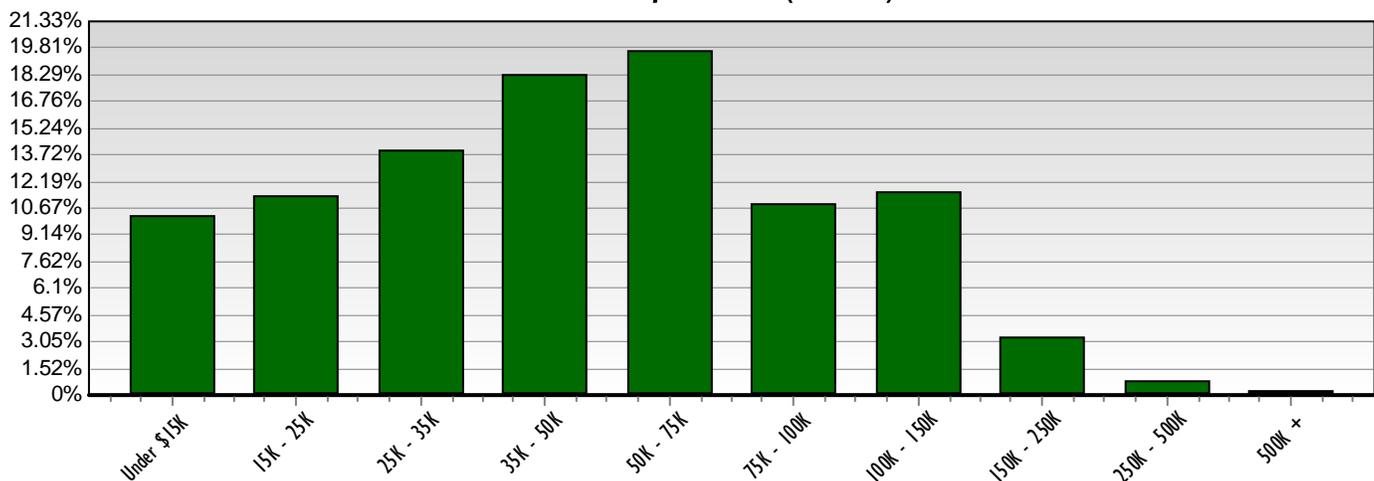


Analysis Geography: City Center
Lemoore, CA

Date: 2/2/2009

Households By Income (Current)	Site
	4
Under \$15,000	1,288
\$15,000 to \$24,999	1,433
\$25,000 to \$34,999	1,771
\$35,000 to \$49,999	2,315
\$50,000 to \$74,999	2,489
\$75,000 to \$99,999	1,379
\$100,000 to \$149,999	1,464
\$150,000 to \$249,999	411
\$250,000 to \$499,999	99
\$500,000 +	29
Total Households By Income	12,678
Average Household Income	\$60,742
Per Capita Income	\$19,897
Median Household Income	\$50,505

Households By Income (Current)



Analysis Geography: City Center
Lemoore, CA

Date: 2/2/2009

Housing Units By Occupancy (Current)	Site 4
---	-------------------------

Owner - Occupied	49.5%
Renter - Occupied	45.2%
Vacant	5.4%

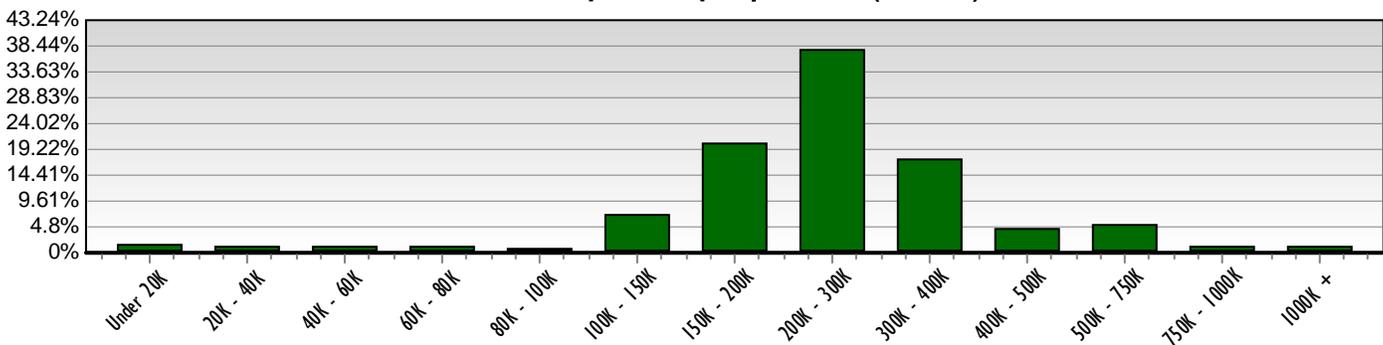
Owner - Occupied Property Values (Current)

Under \$20,000	105
\$20,000 to \$39,999	80
\$40,000 to \$59,999	75
\$60,000 to \$79,999	80
\$80,000 to \$99,999	59
\$100,000 to \$149,999	471
\$150,000 to \$199,999	1,338
\$200,000 to \$299,999	2,499
\$300,000 to \$399,999	1,158
\$400,000 to \$499,999	297
\$500,000 to \$749,999	337
\$750,000 to \$999,999	66
\$1,000,000 +	64

Total Owner - Occupied Property Values **6,629**

Median Property Value **246,492**

Owner - Occupied Property Values (Current)



Analysis Geography: Secondary Trade Area
Lemoore, CA

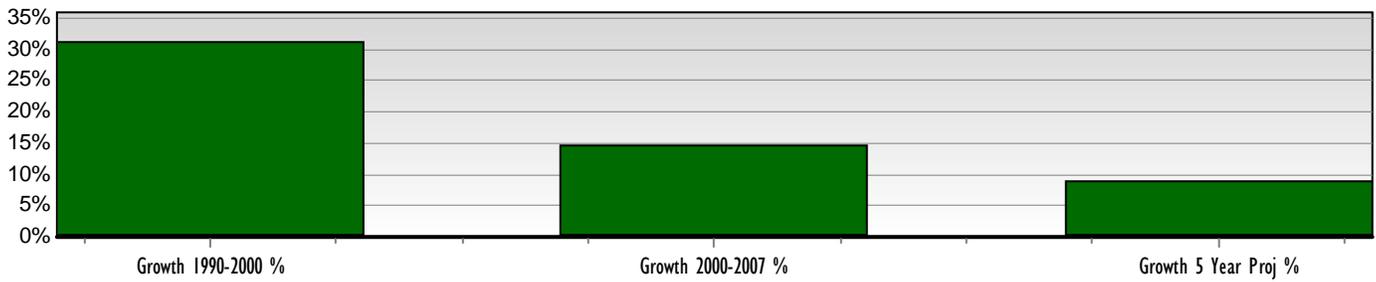
Date: 11/5/2008

Population Profile

Secondary Trade Area

2012 Projection	103,662
2007 Estimate	95,093
2000 Census	83,022
1990 Census	63,316

Population Change



Work Place Population

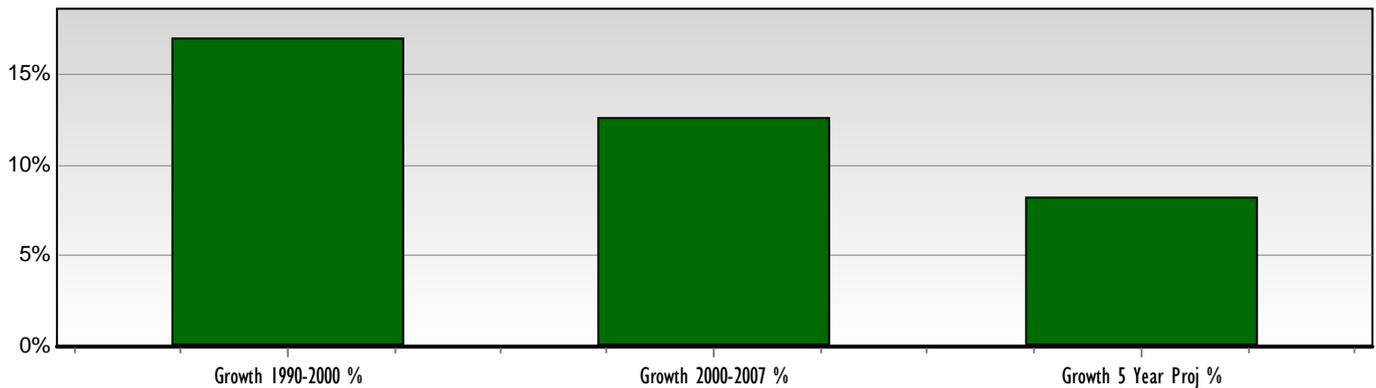
Secondary Trade Area

Total	41,994
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Household Profile

2012 Projection	24,844
2007 Estimate	22,953
2000 Census	20,379
1990 Census	17,419

Household Change

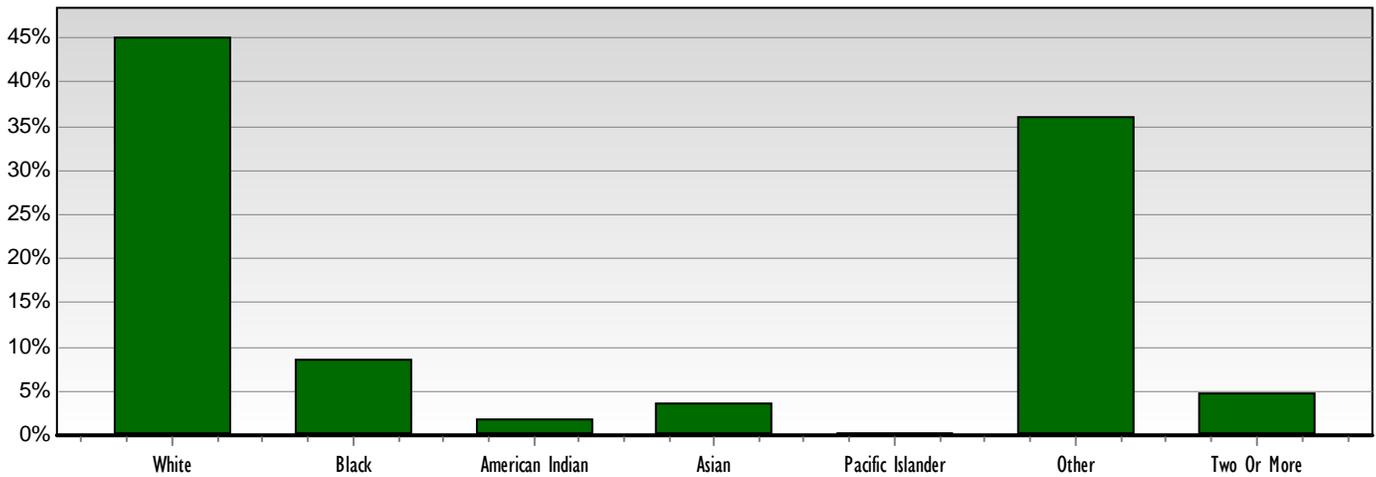


Analysis Geography: Secondary Trade Area
Lemoore, CA

Date: 11/5/2008

Population By Race (Current)	Secondary Trade Area
White	42,855
Black	8,069
American Indian	1,712
Asian	3,464
Pacific Islander	234
Other	34,300
Two Or More	4,459
Total Population By Race	95,093

Population By Race (Current)



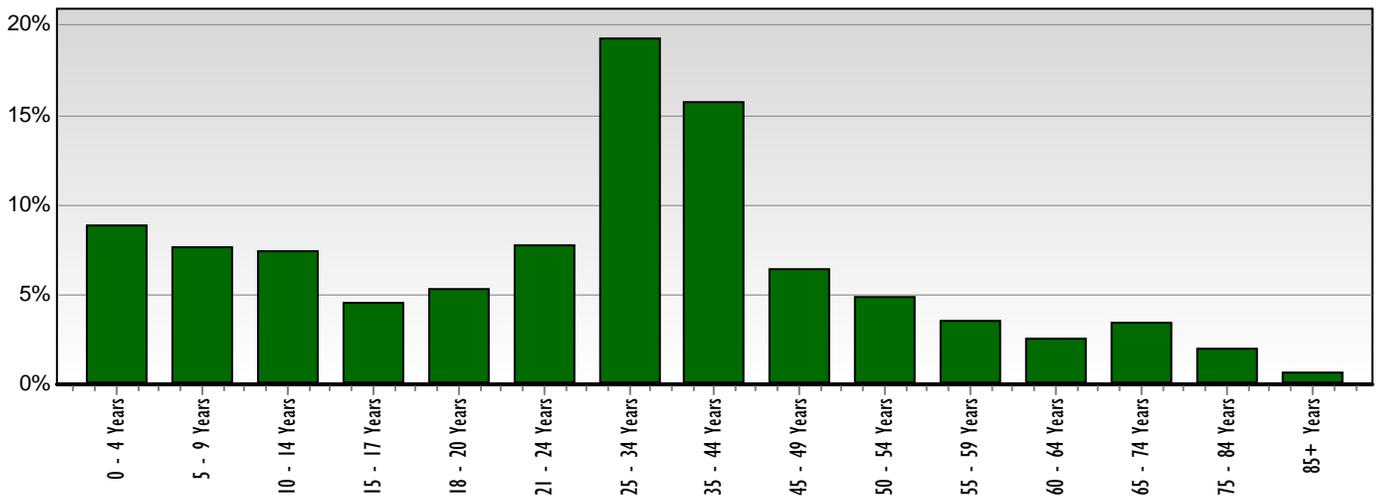
Population By Hispanic Origin (Current)	Secondary Trade Area
Hispanic Origin	50,892
Non Hispanic Origin	44,201

Analysis Geography: Secondary Trade Area
Lemoore, CA

Date: 11/5/2008

Population By Age (Current)	Secondary Trade Area
0 to 4 years	8,408
5 to 9 years	7,256
10 to 14 years	7,056
15 to 17 years	4,274
18 to 20 years	5,071
21 to 24 years	7,414
25 to 34 years	18,321
35 to 44 years	14,953
45 to 49 years	6,103
50 to 54 years	4,611
55 to 59 years	3,385
60 to 64 years	2,423
65 to 74 years	3,308
75 to 84 years	1,897
85+ Years	613
Total Population By Age	95,093
Average Age	31.1
Median Age	29.0

Population By Age (Current)

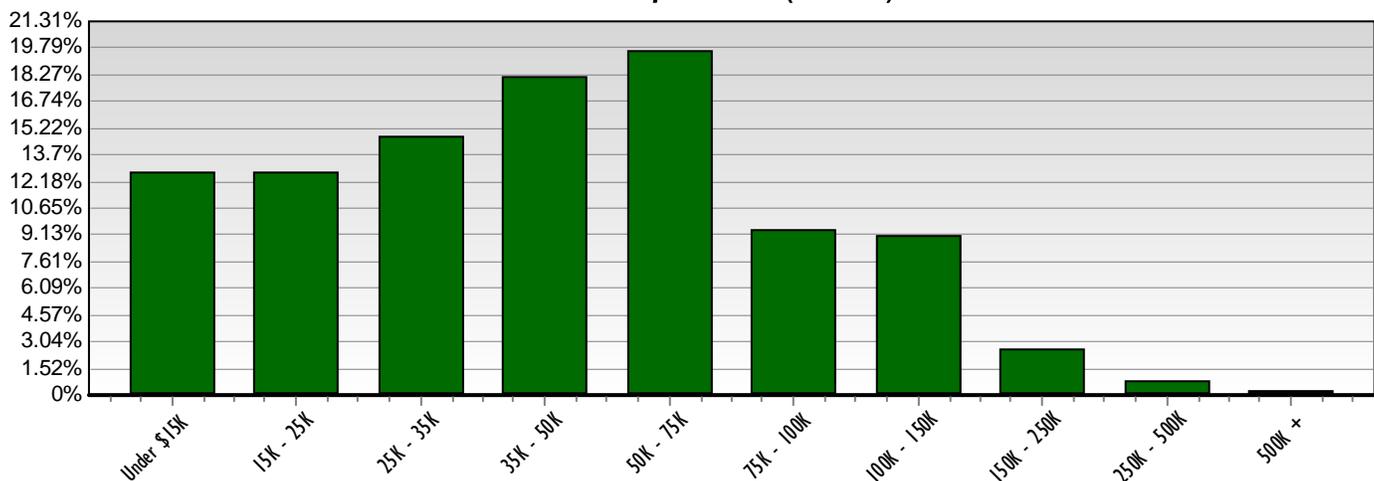


Analysis Geography: Secondary Trade Area
Lemoore, CA

Date: 11/5/2008

Households By Income (Current)	Secondary Trade Area
Under \$15,000	2,918
\$15,000 to \$24,999	2,905
\$25,000 to \$34,999	3,384
\$35,000 to \$49,999	4,168
\$50,000 to \$74,999	4,501
\$75,000 to \$99,999	2,171
\$100,000 to \$149,999	2,069
\$150,000 to \$249,999	609
\$250,000 to \$499,999	185
\$500,000 +	43
Total Households By Income	22,953
Average Household Income	\$55,802
Per Capita Income	\$18,071
Median Household Income	\$45,329

Households By Income (Current)



Analysis Geography: Secondary Trade Area
Lemoore, CA

Date: 11/5/2008

Housing Units By Occupancy (Current) Secondary Trade Area

Owner - Occupied	47.4%
Renter - Occupied	46.6%
Vacant	6.0%

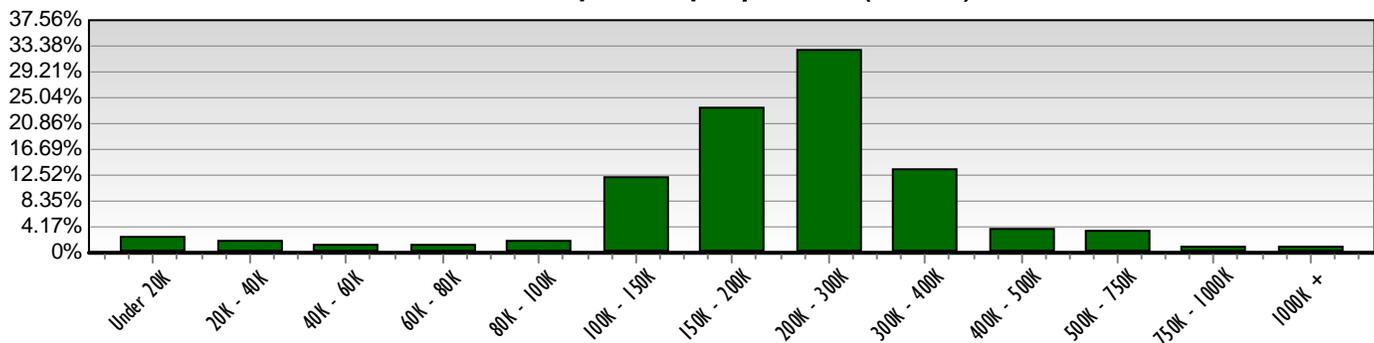
Owner - Occupied Property Values (Current)

Under \$20,000	295
\$20,000 to \$39,999	224
\$40,000 to \$59,999	155
\$60,000 to \$79,999	162
\$80,000 to \$99,999	212
\$100,000 to \$149,999	1,405
\$150,000 to \$199,999	2,718
\$200,000 to \$299,999	3,792
\$300,000 to \$399,999	1,543
\$400,000 to \$499,999	446
\$500,000 to \$749,999	426
\$750,000 to \$999,999	106
\$1,000,000 +	98

Total Owner - Occupied Property Values 11,582

Median Property Value 219,919

Owner - Occupied Property Values (Current)



Elements of Consideration in Establishing an Economic Development Strategy for the City of Lemoore

Submitted by the Kings County Economic Development Corporation

There are a few fundamental tenants to growing an economy:

- Net new jobs and new money must be brought in to grow the economy
- Jobs and housing must be kept in balance
- For retail attraction, first target those goods and services for which there is the greatest leakage
- For industrial attraction, target those industries where location, raw materials, existing infrastructure and other similar factors facilitate a competitive advantage
- There is a greater return on investment when growing an existing businesses over attracting a new business; although a complete strategy requires both
- Business operators are good at their core product or service. They rely on external assistance to learn about incentives to increase profitability and to help stay abreast of regulatory requirements

Lemoore's strengths include:

- **Location** – Highway 41 and SR 198 both connecting Highway 99 and I-5.
- **Two developed industrial parks**, with parcels sufficient to accommodate a wide variety of users.
- **Proximity to NAS Lemoore**, to attract civilian industries and workers that support the mission of the base and to serve its population.
- **A supportive City Council**, willing to do what it takes to attract and grow business.

The Kings EDC has supported the mutual goal of industrial development for over 40 years, in coordination with elected and appointed officials. We have assisted in bringing industry to Lemoore and other areas within Kings County, which benefits Lemoore through the County's property tax distribution formula. Industrial jobs pay Lemoore residents a wage far exceeding typical retail wages. These manufacturing and processing jobs are needed to generate disposable income, which is needed to support retail and services employment and create sales tax revenues. Retail jobs, in and of themselves, contribute only modestly to sales tax income, as the disposable portion is also modest.

Regarding property tax distribution, Kings County utilizes a formula, whereby revenues generated by the assessed real property valuation throughout Kings County is distributed to the tax receiving entities (such as the City of Lemoore) based upon that established percentage share. By virtue of that formula, every tax-receiving entity, including the City of Lemoore, benefits when an industry locates anywhere in the County. Therefore, a recent location of a fertilizer manufacturer and distributor in Hanford will have a positive affect on property tax received by the City of Lemoore. Due to the proximity, Lemoore residents are provided the opportunity for employment anywhere within Kings County, furthering the ability of Lemoore residents to earn a good wage, and return to Lemoore with disposable income. This

dramatically increases the property tax revenues to all taxing entities, without all entities needing to provide public infrastructure to sustain those industries.

Operating principles and agreements in the past have tasked the EDC with industrial attraction and retention, as well as retail support and retention services including business financing, business incentives, counseling and other services. City staff throughout Kings County has been responsible for retail development, to the extent that was a conscious directive from local City Councils. Redevelopment was looked to as a financing mechanism for public infrastructure and other business support during its time, but that was not always the case. Business development is critical to the creation of revenues needed by elected officials for the many services expected by our citizens.

Current **limitations** in Lemoore include a constricted ability to attract businesses that require significant process water, and those that create a significant wastewater flow. Bear in mind that these current limitations only constrict, and do not eliminate the ability of Lemoore to successfully grow and attract industrial jobs. The EDC is currently working with a prospect for which two Lemoore properties are in the final cut of considered properties. This prospect is a large warehousing operation, needing 800 employees, and requiring only domestic services. Potential new businesses to support the F-35C Joint Strike Fighter would similarly require little or no process water or sewer treatment capacity.

While industrial support and development addresses the need to add well-paying jobs into the economy, the City also needs to address the retail leakage it has experienced for literally decades. With a population in excess of 25,000 (25,281 in 2014), there are certain businesses that will consider a location or a second location in Lemoore. For those businesses, the location process can be accelerated by raising the profile of Lemoore with marketing materials, presence at trade shows such as the International Conference of Shopping Centers, trade associations, visitations with retail real estate brokers representing the targeted retail categories, and an aggressive electronic marketing campaign.

The following represent suggestions for a complete **economic development strategy for the City of Lemoore**:

1. **Continue efforts to *retain* retail and industrial businesses** through: routine contacts to share information and referral for workforce training; incentives for hiring and the purchase of certain manufacturing and information technology equipment; recycling efforts; importing goods for direct sale or use in a manufacturing process; business financing; connection to local and regional groups focused by industry; legislative advocacy on issues relating to business; business advocacy leading to permitting; and, business advocacy with the City.
2. **Continue efforts to attract new industrial businesses** and related large employers to bring new jobs and investment into Lemoore and the region. Continued investment in the EDC acknowledges that all secured property, regardless of its physical location in the County, accrues property tax to the City of Lemoore at .9453%. Therefore, all our communities benefit when a business is attracted anywhere in Kings County.
3. **Support business incentive tracking, development and education** for all Lemoore businesses. The EDC currently advises existing businesses from all sectors (including retail and services)

about available tax incentives, financing, workforce development opportunities, business counseling, governmental contracting opportunities and other opportunities “outside” of the business’ normal activity. This adds significantly to the bottom line of business. In the case of the Enterprise Zone, Lemoore businesses have been issued hiring vouchers worth over \$115 million, which does not include the value of sales tax claimed against eligible property and parts.

4. **Support and attract retail, service and restaurants**, focusing principally on attracting chain-type retailers. Small retail will not generally need an organized strategy to attract, as they will often originate from the city or immediate region. Support will be provided all businesses, as it is now through EDC’s retention efforts.

It is believed all these components must be present in a healthy retention and attraction strategy. Some of the questions this commitment raises are: Who is best equipped to coordinate each of these components; does it make sense to have multiple entities address and coordinate these functions; and what resource investment creates the best long term return and a sustainable institutional knowledge base?

The Kings County Economic Development Corporation has a long standing relationship with the City of Lemoore in business retention and attraction. We are prepared to continue our participation in not only the items listed above, but in all other areas of support listed in the previous document provided to Council. If we are not involved in a significant way in business retention and attraction, we simply will not have the resources to continue to offer Lemoore businesses and resident the benefit of many of those previously listed services. We ask the Council to consider the significant knowledge base, relationships with businesses, real estate brokers, site selectors, local land owners, and the sustained marketing message achieved through the association with the eight county California Central Valley Economic Development Corporation that comes with a continued relationship with the EDC. We are happy to discuss and identify ways of improving the product and the communication.

Thank you for the opportunity to offer these opinions. I will be present at your study session to address any questions you may have. I am also available at 585.3536 in advance of the meeting.

John Lehn
President & CEO
Kings County Economic Development Corporation

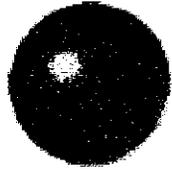


City of Lemoore

Goals and Objectives

Amendments Discussed

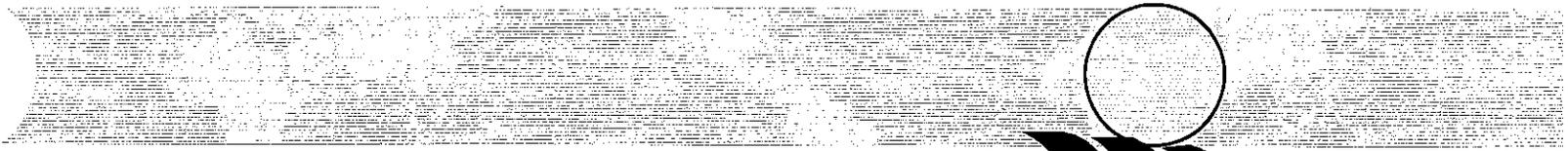
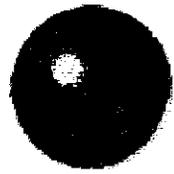
January 2013



Mission Statement

To provide high quality services and protection, and establish the conditions for economic vitality and high quality of life.

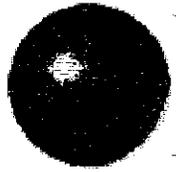
Revised 2005



Mission Statement

To provide high quality services and establish the conditions for economic vitality and high quality of life.

Proposed

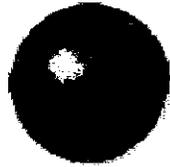


CITY OF
LEMOORE
CALIFORNIA

Vision Statement

Lemoore will be an economically vital community, marked by educational, cultural, recreation and business opportunities.

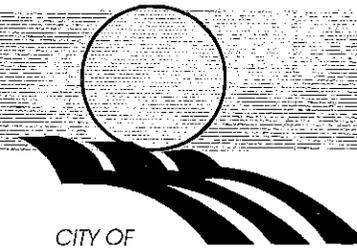
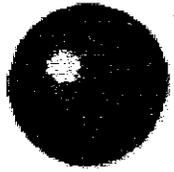
Adopted and Proposed



Goals

- Business and Job Opportunities
- Fiscally Sound City Government
- Preservation: Our Small Town Character
- Quality Municipal Services
- Safe Community For Families

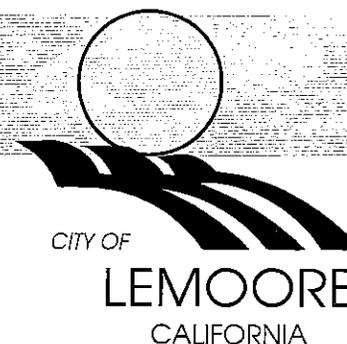
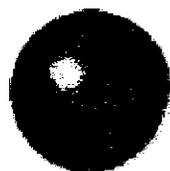
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CITY OF
LEMOORE
CALIFORNIA

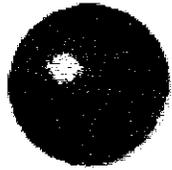
Goals - Proposed

- Business and Job Opportunities
- Fiscally Sound City Government
- “Small Town” Community with Modern Conveniences
- Municipal Services that are Focused on Community Needs and Efficiently Delivered by Customer Oriented Staff
- Safe Community For Families



Current Objectives

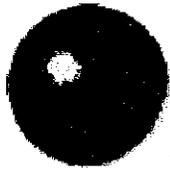
- Increase Sales Tax Revenue by 1.75 Times the Population Growth Over the Next 2 Years
- Create & Implement a True Fast-track Permit Processing System For Commercial/Industrial Businesses That Contribute Significantly To the Local Economy
- Supply Water That Meets the Federal Arsenic Requirements by January 1, 2009
- Secure Future Wastewater Disposal Site(s) & Prepare For new Permit Issuance
- Fully Implement General Plan Update, Including Changes in City Policies Within 18 Months of General Plan Update Adoption
- Significantly Improve Staff's Abilities to Apply For, Manage, & Report On Grants-Utilize Grant Sources Whenever Available
- Modify City Recruitment and Retention Strategies & Personnel System Guidelines To Enable Us To Better Reach & Retain the Next Generation of City Staff



Current Objectives

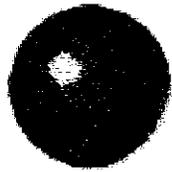
(cont.)

- Expand Community Amenities & Programs Through Participation in Joint Projects with Other Agencies & Public/Private Partnerships
- Include In All New Facility & Equipment Purchases, An Analysis of Both Life Cycle Costs & Carbon Emissions When Making Decisions Regarding Specifications – Analyze Existing Facilities Using Same Criteria
- Increase Our Blight Eradication Efforts Through Enhanced Code Enforcement & Additional Programs, Including Do-it-yourself Programs
- Expand Efforts Toward Combating Gang Activities With Broad-based Community Involvement, Focusing Both On Prevention & Enforcement
- Develop Short & Long Term Solutions For Railroad Rights-of-Way & City Entrances Within Lemoore – Establish Partnerships With Property Owners To Accomplish



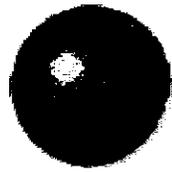
Objectives - Proposed

- Analyze and cut arbitrary regulations in order to promote business openings, expansion and retention
- Earn a reputation for being a “Business Friendly” City by:
 - Conducting an independent study to analyze reorganization of the Planning and Building Inspection Functions – focus on outcomes
 - Easing the permitting process and clearly communicating the City’s and other regulatory agencies requirements to potential applicants
 - Implementing the “spirit” of the regulations
 - Working to reduce the City fees imposed on new business developments



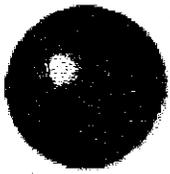
Objectives – Proposed (Cont.)

- Increase General Fund Revenue by Increasing the Property and Sales Tax base by becoming a more “Business Friendly” City
- Implement Blight Eradication Programs and Policies that are sustainable in Post Redevelopment Lemoore
- Develop Short & Long Term Solutions For Railroad Rights-of-Way & City Entrances Within Lemoore – Establish Partnerships With Property Owners To Accomplish



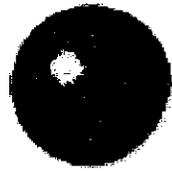
Objectives – Proposed (Cont.)

- Conduct an Independent Study and Implement best practices to improve the efficiency and effectiveness of the water system, focusing on the consistency of water quality throughout the City and seasons
- Include In All New Facility & Equipment Purchases, An Analysis of Both Life Cycle Costs & Carbon Emissions When Making Decisions Regarding Specifications – Analyze Existing Facilities Using Same Criteria



Objectives – Proposed (Cont.)

- Make Customer Service a high priority at all times, in all positions, through staff selection, evaluation, and education/training
- Provide Improved and Consistent Oversight of Staff in all City Departments
- Modify and implement policies that hold Staff accountable for their performance and actions, including serving the community with respect at all times



Objectives – Proposed (Cont.)

- Expand Community Amenities & Programs Through Participation in Joint Projects with Other Agencies & Public/Private Partnerships
- Partner with Concerned Citizens and Community Organizations to Combat the Attraction of Gangs to our Youth, and Reduce the Gang Activity Levels within our Community

Minutes of the Study Session of the
LEMOORE CITY COUNCIL
February 19, 2013

ATTENDANCE:

Mayor Siegel; Mayor Pro Tem Wynne; Council Members Gordon, Neal, Rodarmel; City Manager Britz; Police Chief Laws; Public Works Director Wlaschin; Parks and Recreation Director Simonson; Planning Director Smyth; Finance Director Silva; City Clerk Baley

PUBLIC COMMENT:

Brooke Austin introduced new staff member Jennifer Scarbrough.

DISCUSSION – REVISIONS TO THE CITY MISSION STATEMENT, GOALS AND OBJECTIVES:

Council discussed the proposed Revisions to the Mission Statement, Goals and Objectives and requested that the additional revisions discussed be made available for review during the Regular Meeting.

PRESENTATION – UPDATE – LEMOORE MUNICIPAL GOLF COURSE:

Rich Rhoades presented the Lemoore Municipal Golf Course Update.

CLOSED SESSION PUBLIC COMMENT:

There was no comment.

ADJOURN TO LEMOORE CITY COUNCIL CLOSED SESSION:

At 5:59 p.m., the Council adjourned to closed session regarding labor negotiations, initiation of litigation, and Public Employee Performance Evaluations.

City Engineer Tow arrived at 6:00 p.m.

City Attorney Behrens arrived at 6:10 p.m.

ADJOURNMENT: At 7:28 p.m., Council adjourned to the Regular Meeting.

Minutes of the Regular Meeting of the
LEMOORE CITY COUNCIL
February 19, 2013

MEETING CALLED TO ORDER:

At 7:30 p.m. the meeting was called to order.

ATTENDANCE:

Mayor Siegel; Mayor Pro Tem Wynne; Council Members Gordon, Neal, Rodarmel; City Manager Britz; City Attorney Behrens; Police Chief Laws; Public Works Director Wlaschin; Parks and Recreation Director Simonson; Planning Director Smyth; Project Manager Holwell; Finance Director Silva; City Clerk Baley.

PUBLIC COMMENT:

Rebekah Tomlinson expressed the need for support of the upcoming 5K Charity Run that will raise money for RAINN.

CONSENT CALENDAR:

It was moved by Council Member Gordon, seconded by Mayor Pro Tem Wynne, and carried that the Council approve the Consent Calendar:

Ayes: Gordon, Wynne, Neal, Rodarmel, Siegel

PRESENTATION – UPDATE LEMOORE SENIOR CENTER:

Stretch Deruion expressed concern for the future of the Lemoore Senior Center and requested the City's input to keep it operating. Council agreed that Mayor Pro Tem Wynne and Council Member Gordon, as well a couple of members from the Parks and Recreation Commission will attend a Seniors, Inc. meeting February 26, 2013 to discuss the specifics of the Senior Center's needs further.

REPORT AND RECOMMENDATION – AB1600 DEVELOPMENT IMPACT FEES ANNUAL REPORT:

Spoke: Vernon Sandall

It was moved by Council Member Gordon, seconded by Council Member Rodarmel, and carried by Council to accept and file the FY 11/12 Development Impact Fee Annual Accounting Report as required by Government Code section 66006.

Ayes: Gordon, Rodarmel, Neal, Wynne, Siegel

REPORT AND RECOMMENDATION – MID-YEAR BUDGET ADJUSTMENTS:

Spoke: Vernon Sandall

It was moved by Council Member Rodarmel, seconded by Mayor Pro Tem Wynne, and carried that the Council approve the recommended budget adjustments.

Ayes: Rodarmel, Wynne, Gordon, Neal, Siegel

REPORT AND RECOMMENDATION – DEFERRED COMPENSATION PROVIDERS:

Brahm Rossiter requested consideration as a provider.

Ted Edminster expressed that he currently provides excellent service to City employees.

Council directed staff to continue to research and consider competitive, local providers.

REPORT AND RECOMMENDATION – LABOR RELATIONS CONSULTING AGREEMENT – SUSAN WELLS:

It was moved by Council Member Rodarmel, seconded by Council Member Gordon, and carried that the Council approve the recommendation to enter into the contract for employee relations consultation with Susan Wells.

Ayes: Rodarmel, Gordon, Neal, Wynne, Siegel

ADJOURN TO RECESS:

At 9:15 p.m. the meeting adjourned for a recess.

RECONVENE CITY COUNCIL MEETING:

At 9:20 p.m. the meeting reconvened.

APPROVAL – ADOPTION – REVISED MISSION STATEMENT, GOALS AND OBJECTIVES:

It was moved by Council Member Gordon, seconded by Mayor Pro Tem Wynne, and carried that the Council adopt the revised Mission Statement, Goals and Objectives as presented.

Ayes: Gordon, Wynne, Neal, Rodarmel, Siegel

APPROVAL – WARRANT REGISTER – SUCCESSOR AGENCY PURSUANT TO ENFORCEABLE OBLIGATION PAYMENT SCHEDULE – FEBRUARY 14, 2013:

It was moved by Council Member Rodarmel, seconded by Mayor Pro Tem Wynne and carried by Council to approve the Successor Agency Warrant Register.

Ayes: Rodarmel, Wynne, Gordon, Neal, Siegel

DEPARTMENT/CITY MANAGER REPORTS:

Joe Simonson reminded Council about the Volunteer Appreciation Dinner to be held at the Civic Center February 21, 2013.

David Wlaschin informed Council that Caltrans will be having a Ground Breaking Ceremony on March 15th at 11:00 a.m. to kick off the 19th Avenue Interchange Project.

Holly Smyth requested that Council consider holding a Joint City Council/Planning Commission meeting in March.

COUNCIL REPORTS AND REQUESTS FOR INFORMATION:

Council Member Gordon requested a walk through of the construction zone at the Cinnamon Municipal Complex.

Council Member Rodarmel said that he, City Manager Briltz, City Attorney Behrens and Chief Laws had a conference call with the NRA Attorney Brady to discuss the possibility of passing a Right to Bear Arms Ordinance. Brady suggested that the City continue to consider Resolutions that support the Second Amendment to the Constitution of the United States instead.

Mr. Rodarmel also requested that the memo concerning yard waste blown into public rights of way that was included in the Activity Update be addressed further and changes be made to the Municipal Code.

Council Member Neal reported that he has been told there may be homeless living behind the Dollar Tree Store. He also asked how to address concerns that he has about possible drug and alcohol use at Heritage Park.

Mayor Siegel asked Council for their continued support in evaluating the efficiency of the City processes in working with the City Engineer. He would like to work with Mr. Briltz to put forth a questionnaire for City staff to gain their input and bring them back to Council for review.

ADJOURNMENT:

At 9:45 p.m. the meeting adjourned.

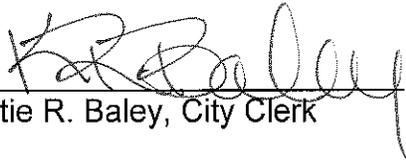
Due to technical difficulties, full digital audio recording of only the Study Session and Agenda Items 9 through 13 of the Regular Meeting are available.

Approved the 5th day of March, 2013.



William M. Siegel, Jr., Mayor

Attest:



Kristie R. Baley, City Clerk

City of Lemoore 2013-2014

Taxes Received

Secured Property Taxes	\$943,748.33
Sales Comp Fund	\$508,813.00
Estimated Leakage	\$200 Million
Sales Tax Value of Leakage	\$1.5 Million

Increased Property Tax from \$87 Million investment county wide (Average of last three years increased valuation): $\$87.243\text{M} \times .009543 = \$87,245$

Estimated capture of sales tax with dedicated campaign:

100,000	\$750
1,000,000	\$7,500
10,000,000	\$75,000
100,000,000	\$750,000

With the City of Lemoore passing a population milestone of 25,000, there is a new strata of retailers and service providers to attract.