

CITY OF PATTERSON



Researched for:



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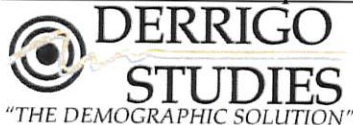
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STANISLAUS
COUNTY,
CALIFORNIA

Demographic
Marketing
Report & Retail Gap
Analysis

Researched and Prepared By:



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February 2020

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CHAPTER I

EXECUTIVE SUMMARY

DEMOGRAPHIC ANALYSIS REPORT ON THE CITY OF PATTERSON, STANISLAUS COUNTY, CALIFORNIA

Purpose of Report:

Derrigo Studies is a consulting firm with over thirty years of experience in land development advisory on commercial and residential uses. In this report, Derrigo Studies examined the potential of the City of Patterson to become the next retail attraction south of Tracy along Interstate 5. Derrigo Studies analyzed a portion of Stanislaus and Merced Counties to determine the relative viability of Patterson to recruit the interest of retailers.

Project Location:

The project location is the City of Patterson and its customized retail tenant trade area:

- ▶ Community Retail Tenant Trade Area

Please reference pages 12 to 15, Vicinity Map, Market Aerial Illustration, Demographic Aerial Illustration and City of Patterson Aerial Illustration for location of subject region.

Executive Summary:

This report was completed for the City of Patterson. The project is to analyze the city's future possibilities including statistics on a Community Retail Tenant Trade Area defined to service prospective retailers within the city. Our findings are summarized as follows:

- ◆ Located immediately off of Interstate 5, the City of Patterson has an average daily traffic count of 47,600 just north of its main artery "Sperry Avenue" (per Caltrans 2017).
- ◆ With an expanding industrial base accommodating distribution centers, Patterson is home to national and global companies including Kohl's, CVS Caremark, Grainger, Amazon, Restoration Hardware, Brake Parts Inc., Platt Electrical Equipment and Affinia Group, Inc. This industrial base will continue to increase with two expansions planned. Grainger proposes an 179,780 square foot expansion to its 800,000 +/- square foot facility in the Keystone Pacific Business Park. Pictured here, this improvement will accommodate an additional 33 semi-trucks. In addition, with an estimated 1.1 million square feet on 55 acres, Arambel Business Park Warehouse has plans to locate just north of the Restoration Hardware Distribution Center. All of these existing and future developments will continue to provide a robust employment base for the city.
- ◆ Field research indicates Patterson's Community Retail Tenant Trade Area is under serviced in retail uses. Trade area residents must drive approximately 20 to 35 minutes to fill this restaurant and retail demand. A Retail Gap Analysis, included in this report, outlines retail revenue in the millions leaving the area in categories such as food services,



clothing, apparel accessories, electronics and sporting goods to name a few (*see chart below for snapshot sporting goods retail leakage*). Some retail sectors have grown in Patterson primarily in gas stations, fast food services and hotel accommodations (including a Hampton Inn that opened February 2020). La Quinta Inn is approved to locate north of Sperry Avenue featuring 81 rooms and an indoor pool, rendering here. *Several attractive retail sites are now available in Patterson including both freeway and main artery locations.*



Residential activity in Patterson's trade area is continuing to increase with approximately 10,735 units currently in process. An exciting new annexation is now under review to include roughly 5,600 residential units, "Zacharias Master Plan". The Villages of Patterson with 3,100 units approved is now under construction with KB Home and K. Hovnanian selling homes. *At build out of active units, the Community Retail Tenant Trade Area will*

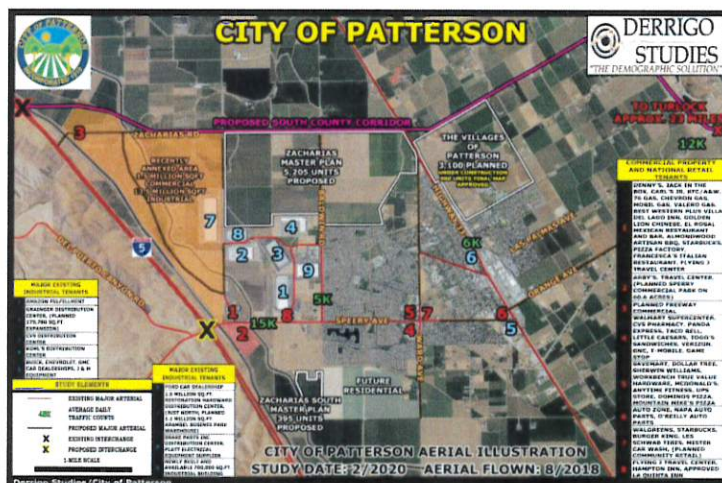
have an additional 38,161 people, an impressive 74% increase in population. At build out of Patterson's current general plan, the trade area's population will be over 95,000 people. Demographic estimates for the Community Retail Tenant Trade Area are listed in this chart:

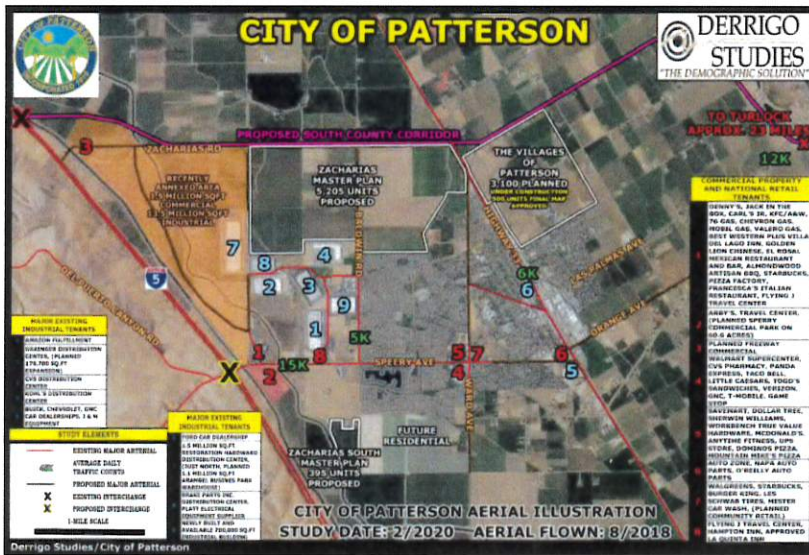
TRADE AREA DEMOGRAPHIC CHARACTERISTICS TRADE AREA BOUNDARIES PAGES 13 & 14	
	Community Retail Tenant Trade Area
FEBRUARY 2020 UPDATED POPULATION	51,626
TOTAL POPULATION AT BUILD OUT OF ALL CURRENTLY ACTIVE UNITS	89,787
TOTAL POPULATION AT BUILD OUT OF PATTERSON'S GENERAL PLAN	95,137
AVERAGE PERSONS PER HOUSEHOLD (2020)	3.55
MEDIAN HOUSEHOLD INCOME (2020)	\$59,668
AVERAGE HOUSEHOLD INCOME (2020)	\$72,764
MEDIAN VALUE OF HOUSING (2020)	\$323,090
SPORTING GOODS, HOBBY, BOOK & MUSIC STORES RETAIL LEAKAGE	-\$12,474,418
Source: Basis of Estimates, page 11 and Retail Gap Analysis, page 17	

City of Patterson:

With a current population of approximately 25,000, the City of Patterson is located within Stanislaus County roughly 27 miles south of Tracy and 23 miles west of Turlock. Mainly an agriculture region, Patterson is known as "The Apricot Capital" with its agriculture base including orchards of apricots, almonds, and walnuts.

In addition to its agriculture industry, Patterson is also home to several distribution centers for national and global companies. Existing industrial centers are highlighted on this aerial illustration with "blue" numbers, full size aerial on page 15.

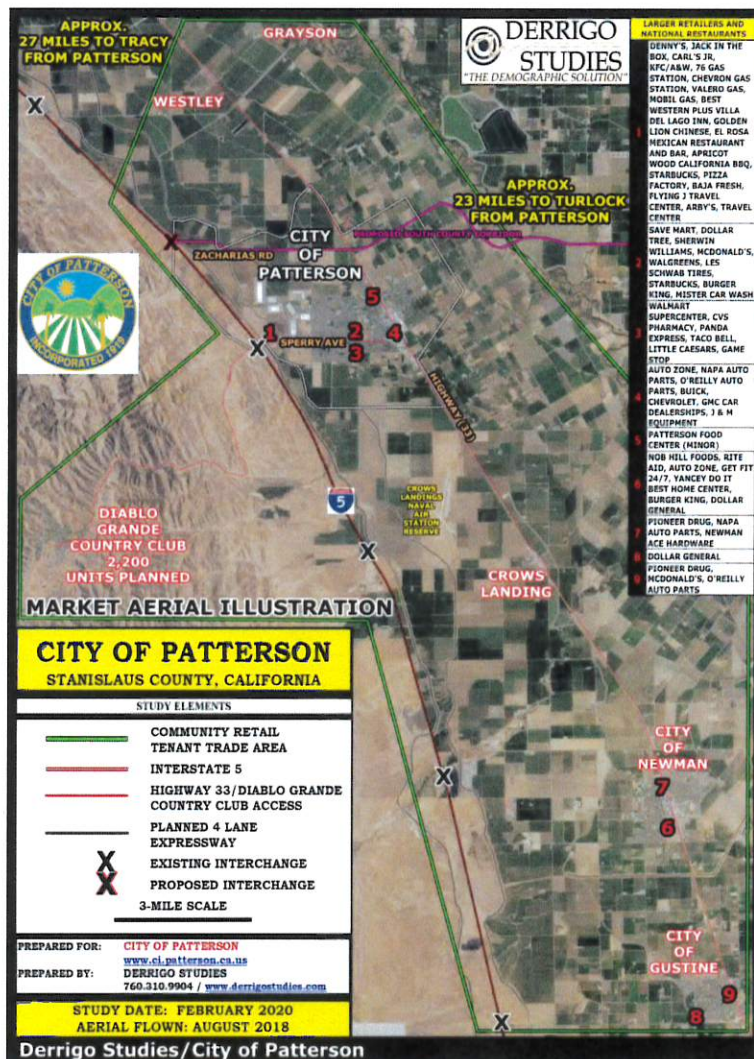




Grainger’s expansion of almost 180,000 square feet is adjacent to their existing distribution center at number 2. North of number 7 is the planned Arambel Business Park Warehouse at over 1.1 million square feet. These industrial parks make Patterson a major employment base in the subject region while attracting over 5,000 employees on a workday basis. This daytime traffic generator will continue to grow with the city's

approved annexation of another 1.5 million square feet of commercial and 13.5 million square feet of industrial uses (highlighted above in “orange”, full size aerial on page 15).

Along with Patterson's growing employment base is the need for additional housing and retail uses. To determine the retail customer base for the City of Patterson, a Community Retail Tenant Trade Area (CRTTA) has been defined. Boundaries of the CRTTA are highlighted here in “green” and are generally Westley on the north, San Joaquin River on the east, south to the City of Gustine and the Diablo Mountain Range on the west; see full size aerial on page 13. This area covers the rural towns of Gustine, Newman, Crows Landing, Patterson, Grayson and Westley. Interstate 5 and Highway 33 serve as the trade area’s primary north/south roadways. Currently, Patterson is the retail hub and attraction for the trade area’s population of almost 52,000. Field research concludes that retail sales not captured by the trade area’s commercial centers are primarily being serviced by retail centers in Turlock, an approximate 20 to 35-minute drive time east of trade area, along with Modesto which is further north on Freeway 99.



Existing Demographics:

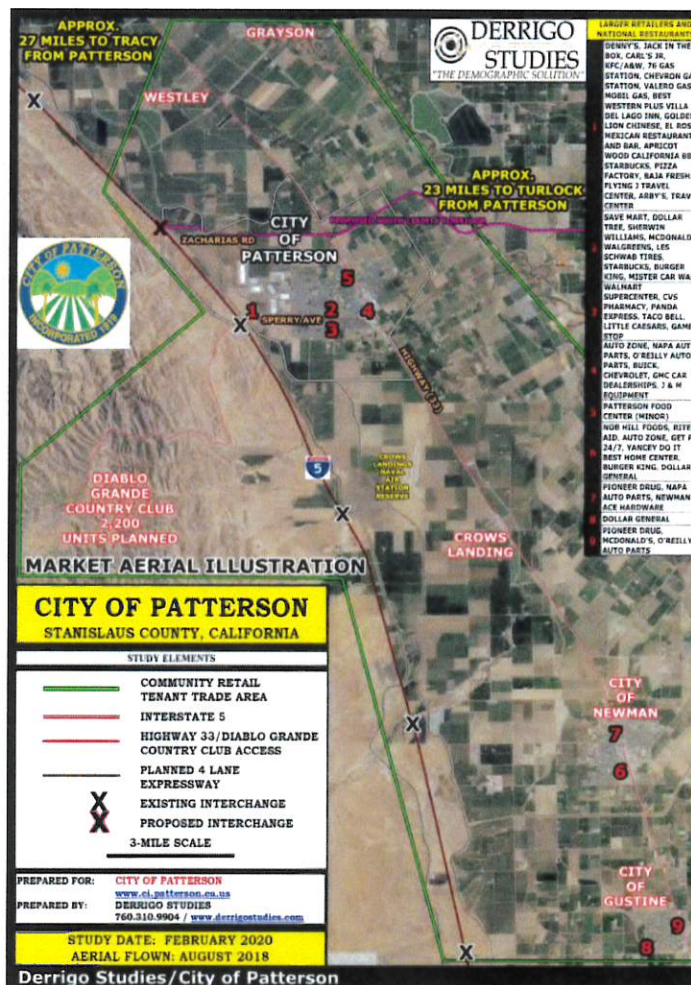
The aerial on page 14 breaks down the study area into Census Tracts (snapshot here however please reference large aerial for visual aid). Existing demographic statistics are outlined for each Census Tract including population, number of housing units, average persons per household, median and average household income and median value of housing. Each estimate is customized for the trade area under review as outlined in Chapter II – Trade Area Analysis, page 9. By breaking down Patterson's CRTTA, Derrigo Studies is able to provide the most accurate demographic numbers possible including existing population of 51,626. To get an idea of the ethnicity makeup for the City of Patterson, the following breakdown applies per the 2017 Census: White 21.9%, Hispanic 61.6%, Black or African American 6.6%, Asian 4.6% and others 5.3%. A total of eight Census Tracts fall within the CRTTA, the City of Patterson is represented by 32.01 and 32.02. Total population for Patterson is estimated at 25,068 (roughly 48.5% of trade area's total population).

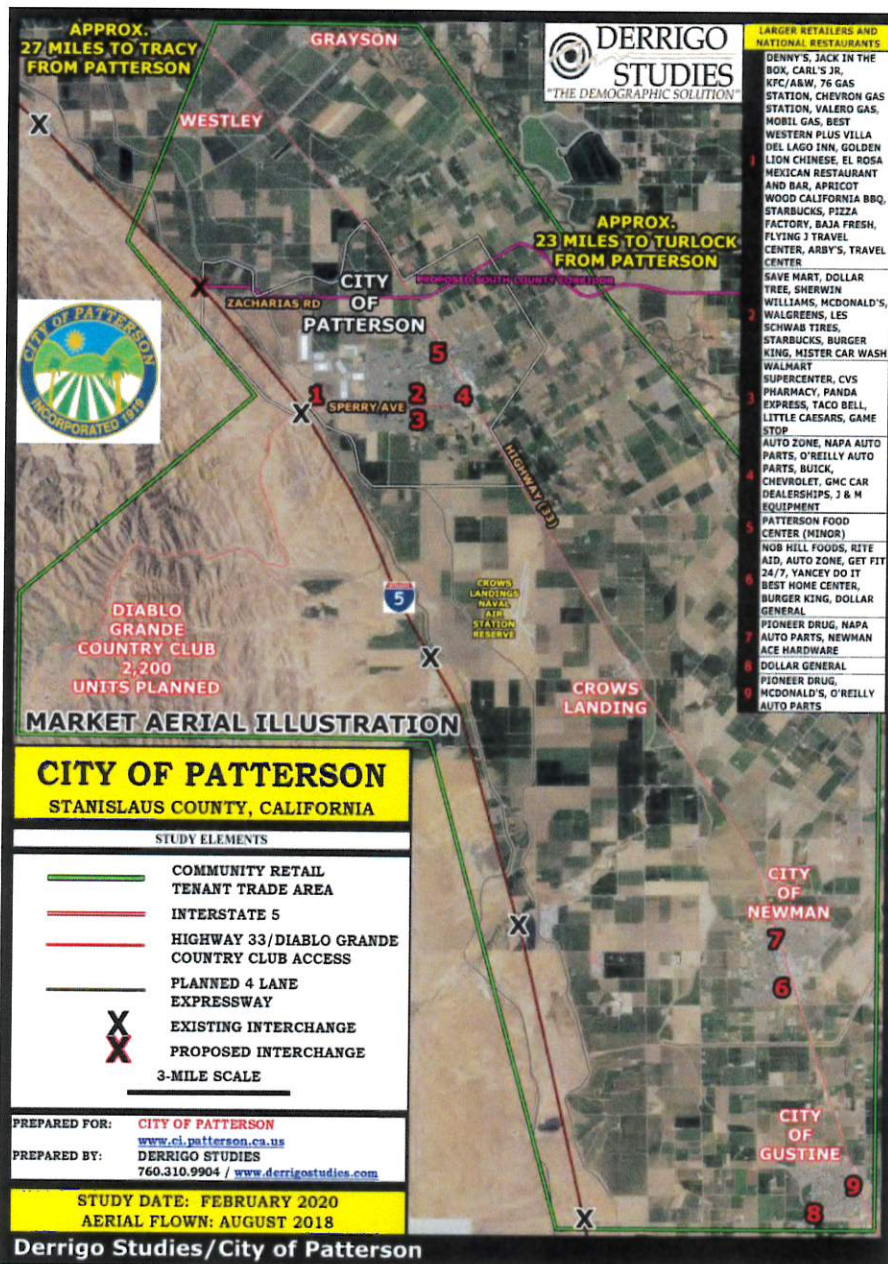


Retail:

Anchor retail competition is highlighted with "red" numbers on this aerial illustration, full size page 13. Field research concludes that Patterson is the main "retail hub" in the CRTTA. The only existing freeway commercial site in the trade area is at number 1. Retailers in operation at this location partially include Denny's, Jack in the Box, Carl's Jr, KFC / A&W, 76 Gas Station, Chevron Gas Station, Best Western Plus Villa De Lago Inn, Golden Lion Chinese, El Rosa Mexican Restaurant and Bar, Starbucks, Flying J Travel Center, Arby's, Travel Center and many more! Arby's and Travel Center are on the southside of Sperry Avenue and are part of a 60.6 acre approved commercial development "Sperry Commercial Park".

The only anchor soft goods retailer in the trade area is at number 3. Walmart Supercenter is featured with CVS while at the adjacent number 2,





Save Mart, Dollar Tree, Sherwin Williams, Walgreens along with shop / pad users are in operation. Les Schwab Tires, Starbucks, Burger King and Mister Car Wash recently joined this tenant line-up.

Number 4 on aerial has three auto supply stores including Auto Zone, NAPA, and O'Reilly Auto Parts.

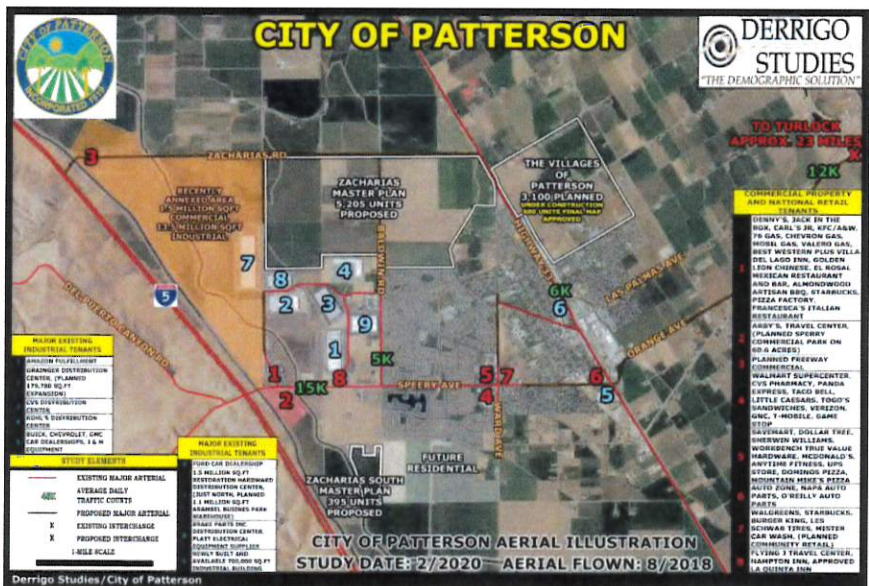
Additional existing retailers in the CRTTA are located in the rural cities of Newman and Gustine over ten miles south of Patterson. The City of Newman's population is roughly 13,626. Retailers serving this area include, numbers 6 and 7, Nob Hill Foods, Rite Aid, Auto Zone, Yancey Do It Best Home Center, Get Fit 24/7, Pioneer Drug, Napa Auto Parts, Newman Ace Hardware and Dollar General.

Three miles further south along Highway 33 is the City of Gustine with approximately 7,465 people. At numbers 8 and 9, four retailers are in operation including Dollar General, Pioneer Drug, a recently completed O'Reilly Auto Parts, and McDonalds. Overall, a total of 9 existing centers are located within the study area. A detailed listing of retailers in each center is outlined on the aerial legend, page 13.

The trade area population's retail demand is partly serviced by the retailers within these nine major commercial centers. Due to the lack of additional retail tenants, residents must travel to Modesto, Turlock or Tracy to service a large portion of their retail needs. To determine the leakage of potential retail dollars leaving the CRTTA, a Retail Gap Analysis has been completed. This analysis provides important data that can be utilized to setup a retail development strategy. By determining those retail groups currently not meeting the needs of Patterson's CRTTA, the city can begin to establish an affective retailer recruitment strategy. The chart listed on the following page highlights the results on a few retail groups (full analysis begins on page 17).

Retail Industry Group	NAICS Code	Demand (Potential Sales)	Supply (Actual Sales)	Retail Gap
Electronics & Appliance Stores	4431	\$16,793,947	\$2,985,635	-\$13,808,312
Bldg Materials, Garden Equip. & Supply Stores	444	\$27,846,949	\$21,381,162	-\$6,465,787
Clothing and Clothing Accessories	448	\$31,906,008	\$2,829,586	-\$29,076,422
Miscellaneous Store Retailers	453	\$17,097,793	\$10,558,810	-\$6,538,983
Food Services & Drinking Places	722	\$48,303,004	\$32,350,340	-\$15,952,664
Totals:		\$141,947,701	\$70,105,533	-\$71,842,168

The “Retail Gap” column highlighted in yellow displays dollars that are either in surplus, positive value, or leakage, negative value. Note all retail groups displayed are showing a leakage supporting the premise that Patterson’s trade area is losing retail sales to Modesto, Turlock and Tracy.



Prospective retailer opportunities exist at several available commercial sites in Patterson. Two are just east of Interstate 5 and numbers 2 and 3. Community center space is also available at number 7. Existing retailers at this location include Walgreens, Starbucks, Burger King, Les Schwab Tires and Mister Car Wash.

Access to Patterson:

Approximately 23 miles west of Freeway 99 and the City of Turlock, Patterson is easily accessible via W. Main Avenue in a 20-minute drive time. Key 2018/2019 traffic counts provided by AMG are listed here. Interstate 5 and Highway 33 extend north and south through the study area. Highway 33 is a two-lane artery running parallel with Interstate 5. This highway connects Patterson to small towns throughout the CRTTA including Westley, Grayson, Crows Landing, Newman, and Gustine. Interstate 5 is the region’s primary access route with an average daily traffic count of 47,600 north of the Sperry Avenue interchange.

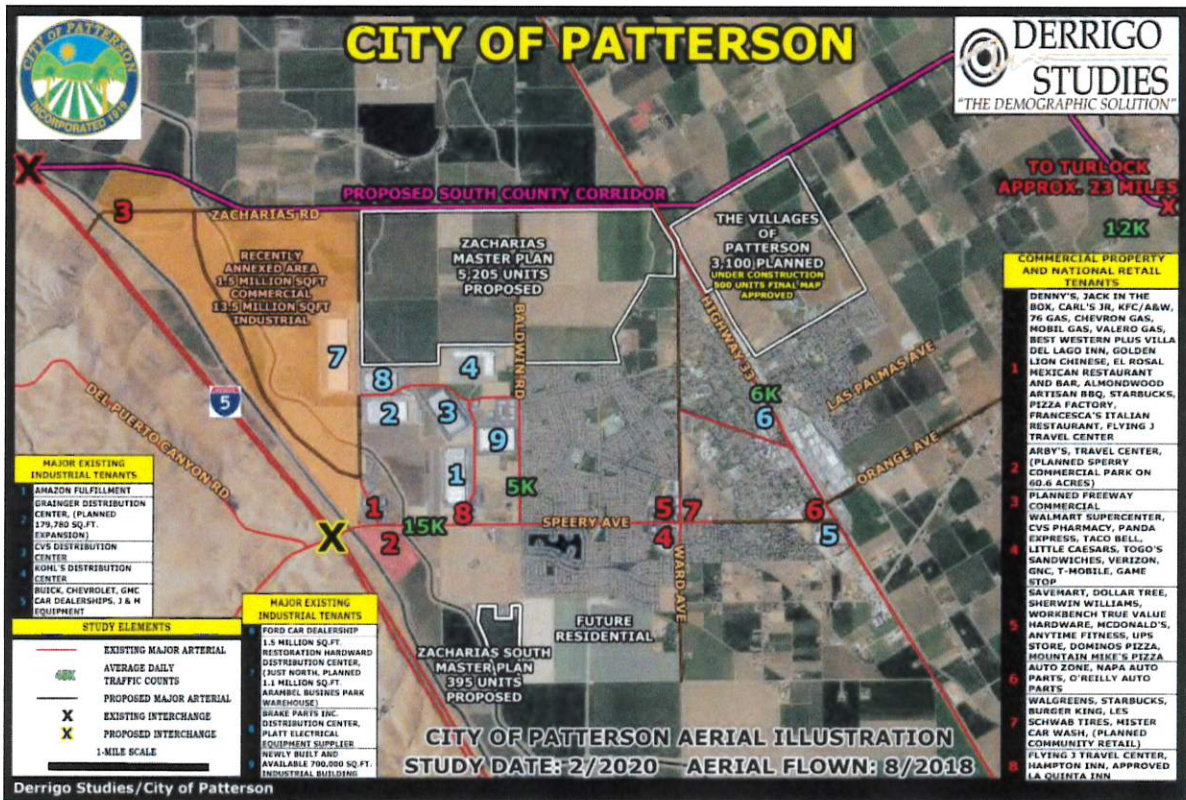
A second interchange is planned along



Interstate 5 in Patterson at Zacharias Road. Zacharias Road is under county review as a possible alignment for the “South County Corridor”, highlighted on aerial below in “pink”. This improvement will make Zacharias Road a 4 – 6 lane east/west major thoroughfare connecting Interstate 5 to Freeway 99. Upon completion, this improvement will further enhance access to future commercial / industrial centers and Zacharias Master Plan’s 5,200 units. Interstate 5 connects Patterson to northern cities including Tracy, Lathrop, Livermore, and Stockton. South of Patterson, Interstate 5 extends over 250 miles before it encounters the next incorporated city, Santa Clarita, over a 4-hour drive time!

Residential Activity:

Outlined below is an aerial illustration giving a snapshot of residential activity in the City of Patterson, full size on page 15. Growth potential for Patterson is substantial with the general plan projecting roughly 18,945 units at total build out (approximately 6,705 units already exist).



Two master plan communities represent the growth sectors in Patterson (outlined in white). East of Highway 33, The Villages of Patterson is now moving forward with three communities under construction representing an estimated 500 units with final map approval (320 apartments and 180 single family homes). KB Home is selling product in Turnleaf with Homes ranging in size from 1450 to 2308 square feet. K. Hovnanian Homes project’s grand opening of its community “Aspire at Apricot Grove” in 2Q2020. Home prices for both neighborhoods have yet to be announced. Self Help Enterprises has 70 apartments underway in “Stonegate Village”. Several additional multi-family units are approved in this area including Landon Lane recently approved for 96 apartments.

With an EIR currently under draft, Zacharias Master Plan is moving forward on being annexed into Patterson. On approximately 1,200 acres, this mixed-use development proposes 5,600 residential units, commercial uses, 7 million square feet industrial uses and a future school site (project north and south of Sperry Avenue). City anticipates EIR to be completed in

8 to 12 months. When built out, Zacharias Master Plan will bring over 16,000 residents to the region.

Just west of the aerial coverage is Diablo Grande Country Club approved in Stanislaus County. Diablo Grande Country Club is on approximately 3,400 acres and at build out will have roughly 2,200 residential units. The mixed-use project is currently for sale, golf course and club house closed in October 2019. Development is approved to include golf courses, swim and tennis facilities, a hotel and executive conference center, a winery, vineyards, town center and shopping center. The only roadway accessing Diablo Grande is out of Patterson, Sperry Avenue / Del Puerto Canyon Road.

All residential activity represents roughly 10,735 units. For a summary of the projected population, see the chart below (details on each residential project are in Chapter III, page 16).

Break Down of Unit Build Out							
Trade Area	2020 Population	Build Out of All Active Units	% Increase	Active Unit Build Out Population	General Plan Remaining Units	Total % Increase	Total Build Out of All Active Units and Patterson's General Plan
Community Retail Tenant	51,626	10,735	74%	89,787	1,505	84%	95,137

Methodology:

This section describes the research methodologies.

(1) MARKET AERIAL ILLUSTRATION AND CITY OF PATTERSON AERIAL ILLUSTRATION:

This information is gathered by field research then plotted on an aerial. Surveying this data allows an analysis to define both existing and future retail uses and needs. Study elements researched and plotted include defining a primary retail trade area, existing and planned major roadways along with existing and planned retailer locations. The City of Patterson Aerial outlines details on the city’s current retail environment, industrial uses, residential activity and projected land uses.

(2) DEMOGRAPHIC AERIAL ILLUSTRATION AND TRADE AREA CALCULATION CHARTS:

Demographic data is broken down by Census Tracts on an aerial photo. This data consists of estimated updates on population, number of housing units, average persons per household, median, and average household income and finally median value of housing. All of this data is estimated and gathered in several different ways depending on the area that is being studied. For details on how DDS arrives at these figures in this study, please reference "Basis of Estimates".

The Existing Demographic Chart displays data outlined on the Demographic Aerial Illustration. This analysis is completed on the trade area and calculates an updated population estimate. Also calculated per trade area is the number of housing units. With respect to average persons per household, median, and average household income and median value of housing, this analysis outlines averages for the trade area.

The next chart is the “Future Population Chart”. On each trade area there is both an “Existing Demographic Chart” and a “Future Population Chart”. The two tie together in the following manner - Column 5 on the Existing Demographic Chart provides an updated estimated population number for the subject area. By taking this number over to Column 4 on the Future Population Chart, we can now move forward in defining further population growth.

CHAPTER II

TRADE AREA ANALYSIS

PREPARED BY: DERRIGO STUDIES
 LOCATION: PATTERSON, STANISLAUS COUNTY, CALIFORNIA
 DATE: FEBRUARY 2020

COMMUNITY RETAIL TENANT TRADE AREA - EXISTING DEMOGRAPHICS									
CENSUS TRACT NUMBER	POPULATION ESTIMATE FEB. 2020	HOUSING UNITS FEB. 2020	COMMUNITY RETAIL TENANT TRADE AREA			APPH 2020	MEDIAN HOUSEHOLD INCOME 2020	AVERAGE HOUSEHOLD INCOME 2020	MEDIAN VALUE OF HOUSING 2020
			% WITHIN	POPULATION	HOUSING UNITS				
20.00	7,465	2,408	100.00%	7,465	2,408	3.10	\$48,859	\$58,406	\$155,760
32.01	5,587	1,510	100.00%	5,587	1,510	3.70	\$47,736	\$65,146	\$240,130
32.02	19,481	5,195	100.00%	19,481	5,195	3.75	\$71,885	\$86,486	\$500,320
33.00B	2,135	610	100.00%	2,135	610	3.50	\$56,160	\$78,624	\$311,520
33.00A	980	280	100.00%	980	280	3.50	\$73,008	\$89,856	\$584,100
33.00C	1,488	465	100.00%	1,488	465	3.20	\$84,240	\$89,856	\$402,380
34.00	864	270	100.00%	864	270	3.20	\$35,942	\$73,008	\$324,500
35.00	13,626	3,785	100.00%	13,626	3,785	3.60	\$52,790	\$61,776	\$192,104
TOTAL									
POPULATION: 51,626 51,626									
TOTAL HOUSING UNITS: 14,523 14,523									
TRADE AREA WEIGHTED AVERAGES:						3.55	\$59,668	\$72,764	\$323,090

SOURCE: "SEE BASIS OF ESTIMATES" AT END OF REPORT.

PREPARED BY: DERRIGO STUDIES
 LOCATION: PATTERSON, STANISLAUS COUNTY, CALIFORNIA
 DATE: FEBRUARY 2020

COMMUNITY RETAIL TENANT TRADE AREA - FUTURE POPULATION						
	TOTAL UNITS		AVERAGE PERSON PER HOUSEHOLD		ADDITIONAL POPULATION	POPULATION ESTIMATE
COLUMNS:	(1)		(2)		(3)	(4)
(A). FEBRUARY 2020 POPULATION						51,626
(B). UNITS RECENTLY BUILT	0	X	3.55	=	0	
(C). ACTIVE UNITS	10,735	X	3.55	=	38,161	
(D). GENERAL PLAN UNITS	1,505	X	3.55	=	5,350	
(E). FEBRUARY 2020 UPDATED POPULATION						51,626
(F). TOTAL POPULATION AT BUILD OUT OF ALL ACTIVE UNITS						89,787
(G). TOTAL POPULATION AT BUILD OUT OF PATTERSON'S GENERAL PLAN						95,137

SOURCE: (1)=NUMBER OF UNITS ESTIMATED BASED ON PLANNED RESIDENTIAL PROJECTS
 (2),(4)=SEE EXISTING DEMOGRAPHIC CHART-COMMUNITY RETAIL TENANT TRADE AREA
 (3)=(1) X (2)

BASIS OF ESTIMATES

(A). POPULATION ESTIMATES FEBRUARY 2020:

Housing units multiplied by Average Persons Per Household estimate.

(B). NUMBER OF HOUSING UNITS FEBRUARY 2020:

Derrigo Studies counted roof tops on August 2018 aerial. Then added in units that have been recently built.

(C). AVERAGE PERSONS PER HOUSEHOLD ESTIMATES 2020:

2017 Census figures adjusted by Derrigo Studies where needed based on housing unit type.

(D). MEDIAN HOUSEHOLD INCOME ESTIMATES 2020:

2017 Census figures adjusted by Derrigo Studies where needed based on housing unit type.

(E). MEDIAN VALUE OF HOUSING ESTIMATES 2020:

2017 Census figures adjusted by Derrigo Studies where needed based on housing unit type.

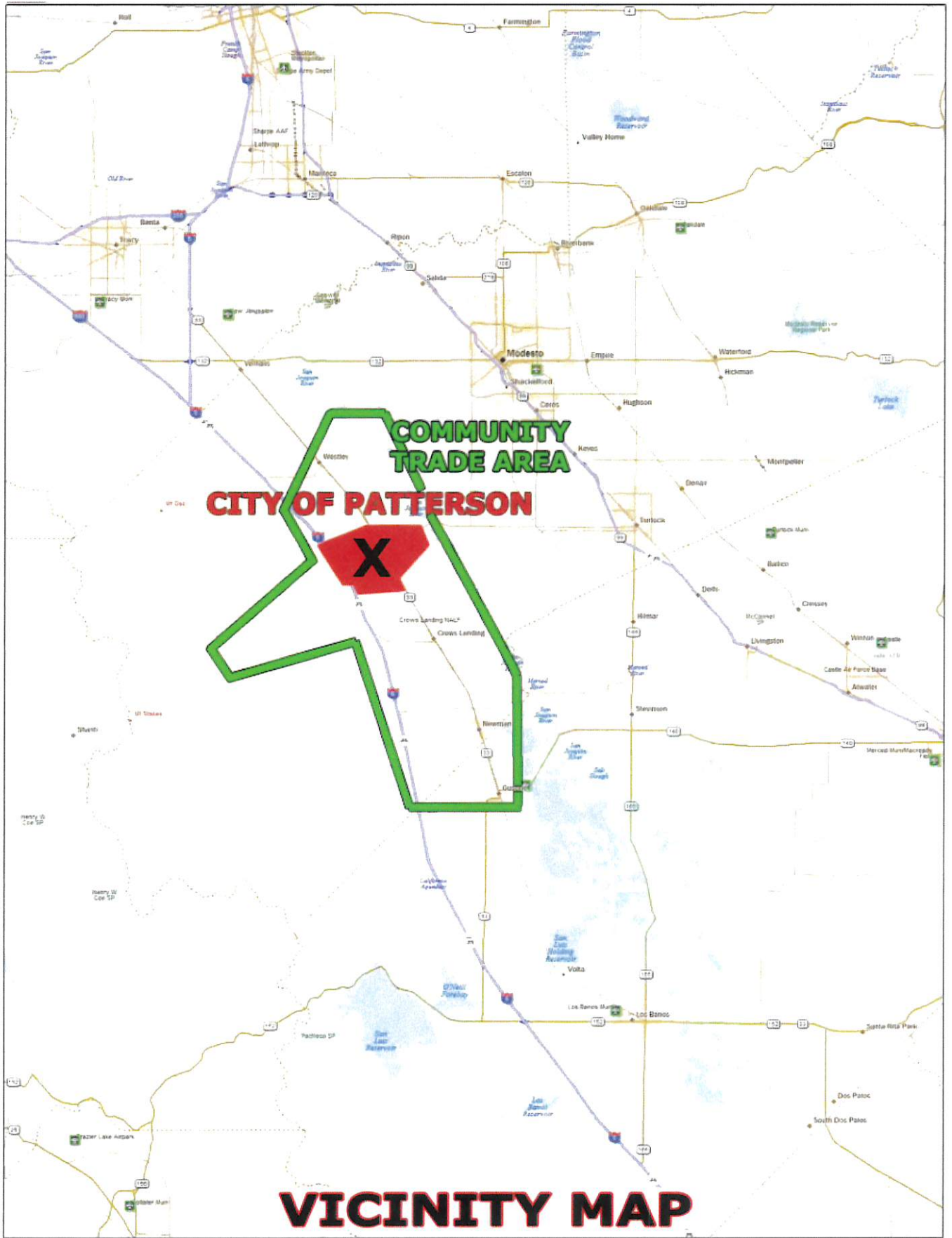
(F). POPULATION PROJECTIONS:

Evaluated each project on an individual basis and added up the number of units to be built over the respective years depending on input gathered from each residential builder, (i.e. financing information, rate of monthly sales, construction schedules and water availability).

The information contained in this study is obtained from sources that we deem reliable. We have no reason to doubt its accuracy, but we do not guarantee it.

CHAPTER III

EXHIBITS

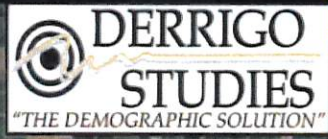


VICINITY MAP



**APPROX.
27 MILES TO TRACY
FROM PATTERSON**

GRAYSON

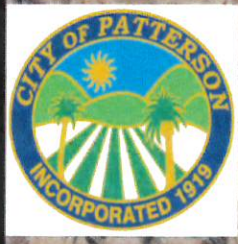


LARGER RETAILERS AND NATIONAL RESTAURANTS

- 1 DENNY'S, JACK IN THE BOX, CARL'S JR, KFC/A&W, 76 GAS STATION, CHEVRON GAS STATION, VALERO GAS, MOBIL GAS, BEST WESTERN PLUS VILLA DEL LAGO INN, GOLDEN LION CHINESE, EL ROSA MEXICAN RESTAURANT AND BAR, APRICOT WOOD CALIFORNIA BBQ, STARBUCKS, PIZZA FACTORY, BAJA FRESH, FLYING J TRAVEL CENTER, ARBY'S, TRAVEL CENTER
- 2 SAVE MART, DOLLAR TREE, SHERWIN WILLIAMS, MCDONALD'S, WALGREENS, LES SCHWAB TIRES, STARBUCKS, BURGER KING, MISTER CAR WASH
- 3 WALMART SUPERCENTER, CVS PHARMACY, PANDA EXPRESS, TACO BELL, LITTLE CAESARS, GAME STOP
- 4 AUTO ZONE, NAPA AUTO PARTS, O'REILLY AUTO PARTS, BUICK, CHEVROLET, GMC CAR DEALERSHIPS, J & M EQUIPMENT
- 5 PATTERSON FOOD CENTER (MINOR)
- 6 NOB HILL FOODS, RITE AID, AUTO ZONE, GET FIT 24/7, YANCEY DO IT BEST HOME CENTER, BURGER KING, DOLLAR GENERAL
- 7 PIONEER DRUG, NAPA AUTO PARTS, NEWMAN ACE HARDWARE
- 8 DOLLAR GENERAL
- 9 PIONEER DRUG, MCDONALD'S, O'REILLY AUTO PARTS

WESTLEY

**APPROX.
23 MILES TO TURLOCK
FROM PATTERSON**



CITY OF PATTERSON

ZACHARIAS RD

PROPOSED SOUTH COUNTY CORRIDOR

SPERRY AVE

HIGHWAY (33)

**DIABLO GRANDE COUNTRY CLUB
2,200 UNITS PLANNED**

CROWS LANDINGS NAVAL AIR STATION RESERVE

CROWS LANDING

MARKET AERIAL ILLUSTRATION

**CITY OF PATTERSON
STANISLAUS COUNTY, CALIFORNIA**

STUDY ELEMENTS

- COMMUNITY RETAIL TENANT TRADE AREA
 - INTERSTATE 5
 - HIGHWAY 33/DIABLO GRANDE COUNTRY CLUB ACCESS
 - PLANNED 4 LANE EXPRESSWAY
 - EXISTING INTERCHANGE
 - PROPOSED INTERCHANGE
- 3-MILE SCALE

PREPARED FOR: **CITY OF PATTERSON**
www.ci.patterson.ca.us

PREPARED BY: **DERRIGO STUDIES**
760.310.9904 / www.derrigostudies.com

**STUDY DATE: FEBRUARY 2020
AERIAL FLOWN: AUGUST 2018**

CITY OF NEWMAN

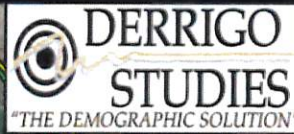
6

CITY OF GUSTINE

8

**APPROX.
27 MILES TO TRACY
FROM PATTERSON**

GRAYSON



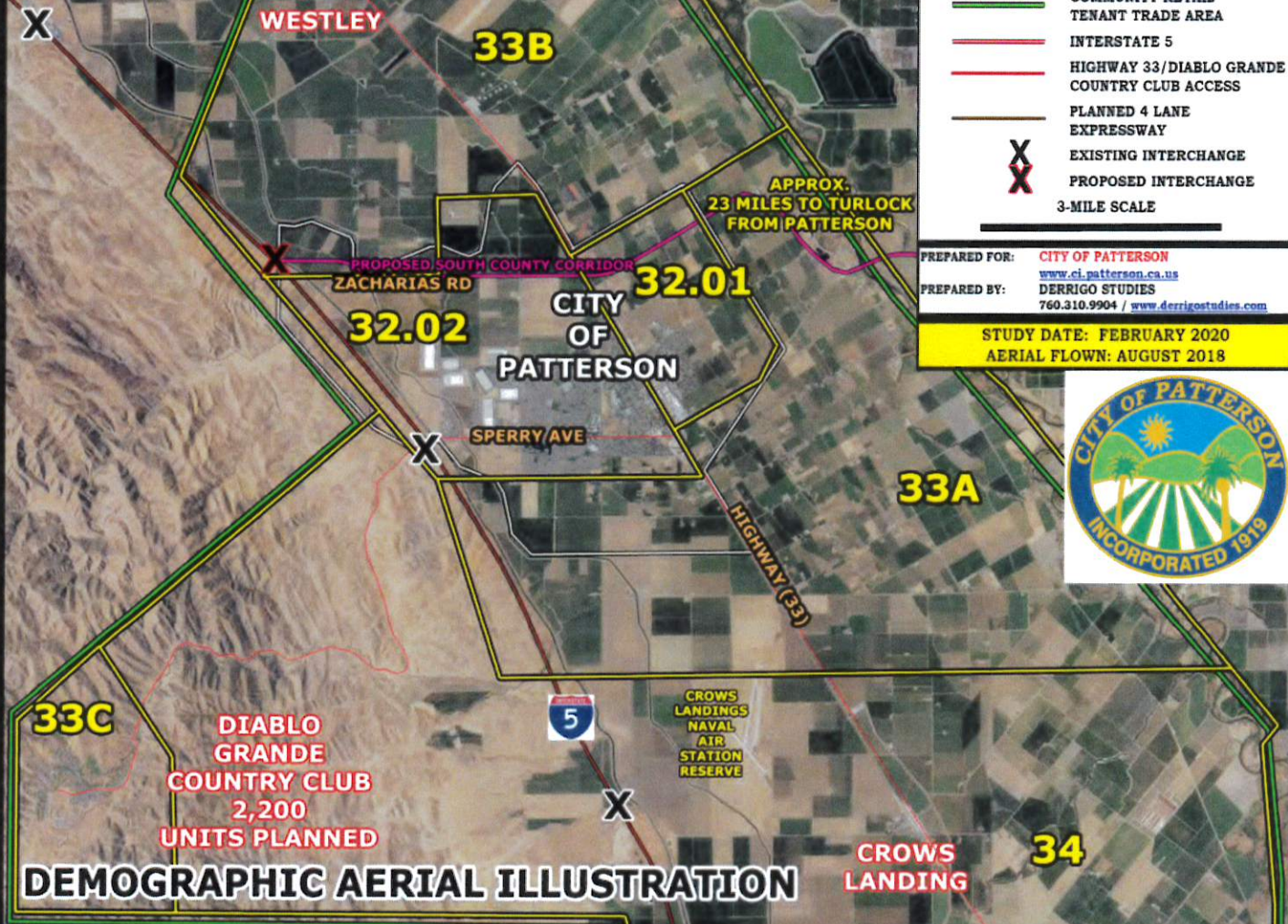
CITY OF PATTERSON
STANISLAUS COUNTY, CALIFORNIA

STUDY ELEMENTS

- COMMUNITY RETAIL TENANT TRADE AREA
 - INTERSTATE 5
 - HIGHWAY 33/DIABLO GRANDE COUNTRY CLUB ACCESS
 - PLANNED 4 LANE EXPRESSWAY
 - EXISTING INTERCHANGE
 - PROPOSED INTERCHANGE
- 3-MILE SCALE

PREPARED FOR: **CITY OF PATTERSON**
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PREPARED BY: **DERRIGO STUDIES**
760.310.9904 / www.derrigostudies.com

STUDY DATE: FEBRUARY 2020
AERIAL FLOWN: AUGUST 2018



DEMOGRAPHIC AERIAL ILLUSTRATION

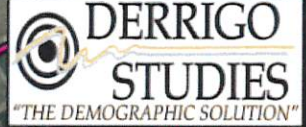
CENSUS TRACT BREAKDOWN

CENSUS TRACT NUMBER	POPULATION ESTIMATE FEB. 2020	HOUSING UNITS FEB. 2020	APPH 2020	MEDIAN HOUSEHOLD INCOME 2020	AVERAGE HOUSEHOLD INCOME 2020	MEDIAN VALUE OF HOUSING 2020
20.00	7,465	2,408	3.10	\$48,859	\$58,406	\$155,760
32.01	5,587	1,510	3.70	\$47,736	\$65,146	\$240,130
32.02	19,481	5,195	3.75	\$71,885	\$86,486	\$500,320
33.00B	2,135	610	3.50	\$56,160	\$78,624	\$311,520
33.00A	980	280	3.50	\$73,008	\$89,856	\$584,100
33.00C	1,488	465	3.20	\$84,240	\$89,856	\$402,380
34.00	864	270	3.20	\$35,942	\$73,008	\$324,500
35.00	13,626	3,785	3.60	\$52,790	\$61,776	\$192,104
Totals	51,626	14,523				

SOURCE: POPULATION = HOUSING UNITS MULTIPLIED BY A.P.P.H.
 # OF HOUSING UNITS = DDS COUNTED ROOF TOPS ON AUGUST 2018 AERIAL
 A.P.P.H. = 2017 CENSUS FIGURES ADJUSTED BASED ON HOUSING TYPE
 MEDIAN HSHLD. INCOME = 2017 CENSUS FIGURES ADJUSTED BASED ON HOME VALUES
 AVERAGE HSHLD. INCOME = 2017 CENSUS FIGURES ADJUSTED BASED ON HOME VALUES
 MEDIAN VALUE OF HOUSING = 2017 CENSUS FIGURES ADJUSTED BASED ON HOME VALUES

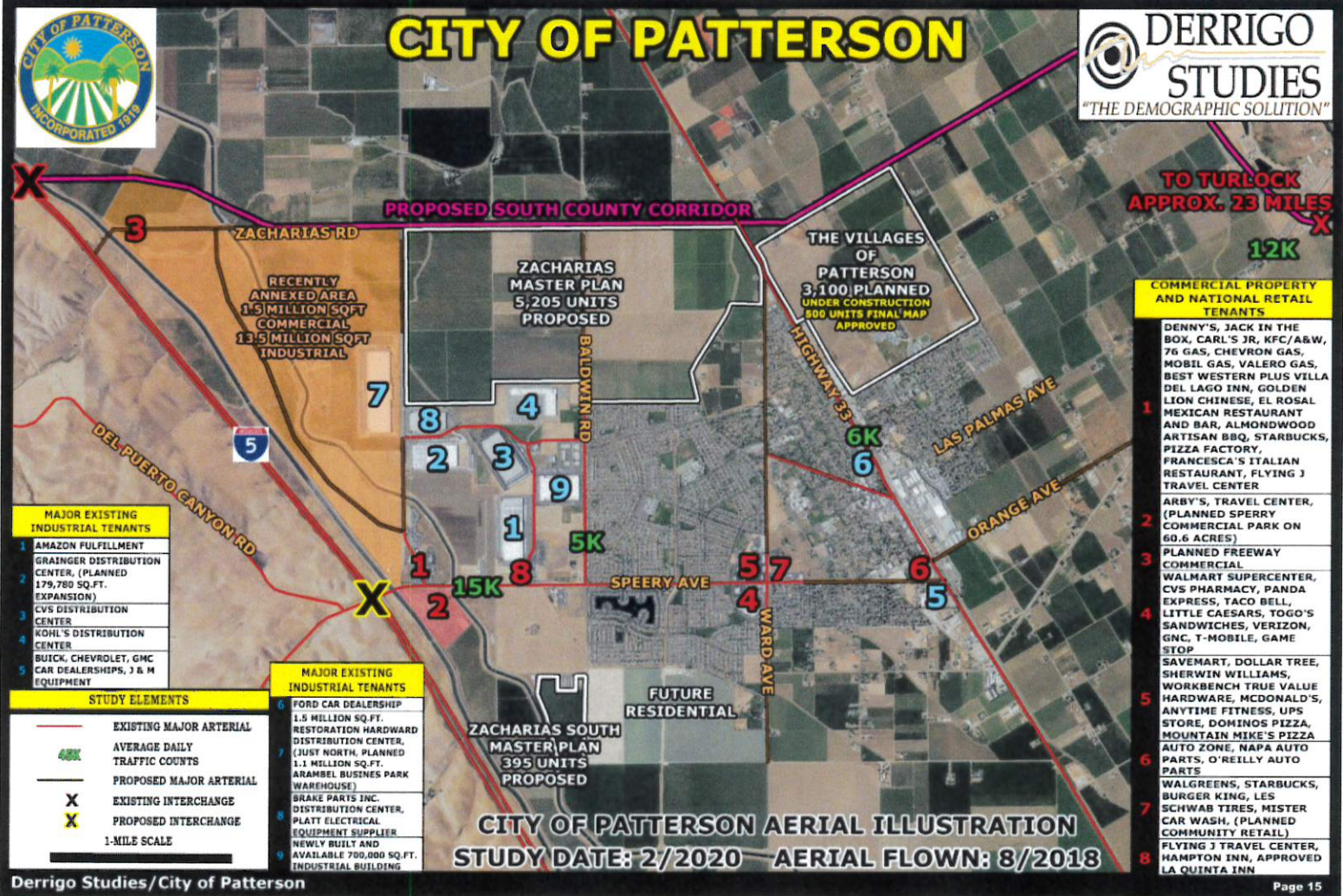


CITY OF PATTERSON



PROPOSED SOUTH COUNTY CORRIDOR

TO TURLOCK APPROX. 23 MILES



MAJOR EXISTING INDUSTRIAL TENANTS

- 1 AMAZON FULFILLMENT
- 2 GRAINGER DISTRIBUTION CENTER, (PLANNED 179,780 SQ.FT. EXPANSION)
- 3 CVS DISTRIBUTION CENTER
- 4 KOHL'S DISTRIBUTION CENTER
- 5 BUICK, CHEVROLET, GMC CAR DEALERSHIPS, J & M EQUIPMENT

MAJOR EXISTING INDUSTRIAL TENANTS

- 6 FORD CAR DEALERSHIP 1.5 MILLION SQ.FT. RESTORATION HARDWARE DISTRIBUTION CENTER, (JUST NORTH, PLANNED 1.1 MILLION SQ.FT. ARAMBEL BUSINES PARK WAREHOUSE)
- 8 BRAKE PARTS INC. DISTRIBUTION CENTER, PLATT ELECTRICAL EQUIPMENT SUPPLIER NEWLY BUILT AND AVAILABLE 700,000 SQ.FT. INDUSTRIAL BUILDING
- 9

STUDY ELEMENTS

- EXISTING MAJOR ARTERIAL
- 48K AVERAGE DAILY TRAFFIC COUNTS
- PROPOSED MAJOR ARTERIAL
- X EXISTING INTERCHANGE
- X PROPOSED INTERCHANGE
- 1-MILE SCALE

COMMERCIAL PROPERTY AND NATIONAL RETAIL TENANTS

- 1 DENNY'S, JACK IN THE BOX, CARL'S JR, KFC/A&W, 76 GAS, CHEVRON GAS, MOBIL GAS, VALERO GAS, BEST WESTERN PLUS VILLA DEL LAGO INN, GOLDEN LION CHINESE, EL ROSAL MEXICAN RESTAURANT AND BAR, ALMONDWOOD ARTISAN BBQ, STARBUCKS, PIZZA FACTORY, FRANCESCA'S ITALIAN RESTAURANT, FLYING J TRAVEL CENTER
- 2 ARBY'S, TRAVEL CENTER, (PLANNED SPERRY COMMERCIAL PARK ON 60.6 ACRES)
- 3 PLANNED FREEWAY COMMERCIAL
- 4 WALMART SUPERCENTER, CVS PHARMACY, PANDA EXPRESS, TACO BELL, LITTLE CAESARS, TOGO'S SANDWICHES, VERIZON, GNC, T-MOBILE, GAME STOP
- 5 SAVEMART, DOLLAR TREE, SHERWIN WILLIAMS, WORKBENCH TRUE VALUE HARDWARE, MCDONALD'S, ANYTIME FITNESS, UPS STORE, DOMINOS PIZZA, MOUNTAIN MIKE'S PIZZA AUTO ZONE, NAPA AUTO PARTS, O'REILLY AUTO PARTS
- 6 WALGREENS, STARBUCKS, BURGER KING, LES SCHWAB TIRES, MISTER CAR WASH, (PLANNED COMMUNITY RETAIL)
- 7 FLYING J TRAVEL CENTER, HAMPTON INN, APPROVED LA QUINTA INN
- 8

CITY OF PATTERSON AERIAL ILLUSTRATION
STUDY DATE: 2/2020 — AERIAL FLOWN: 8/2018

PREPARED BY: DERRIGO DEMOGRAPHIC STUDIES
 AREA: PATTERSON, STANISLAUS COUNTY, CALIFORNIA
 DATE: FEBRUARY 2020

RESIDENTIAL PROJECT LISTING

AREA	PROJECT NAME	APPLICANT/DEV.	UNIT TYPE	STATUS	TOTAL UNITS	EXIST-ING	RB	UC	FM	TM	DP	PRICE \$(000)	SQ. FT.	DEV. #	S.P.	OTHER
PATTERSON	TURNLEAF, ASPIRE AT APRICOT GROVE AND STONEGATE VILLAGE AT VILLAGES OF PATTERSON	KB HOME, K. HOVNIANIAN HOMES AND SELF HELP ENTERPRISES	MIX	UC	3,100			120	380	2,600		COMING SOON	1450-2500	888.524.6637	VILLAGES OF PATTERSON	500 UNITS NOW HAVE FINAL MAP APPROVAL (320 APARTMENTS AND 180 SINGLE FAMILY UNITS). KB HOME IS UNDERWAY ON TURNLEAF AND K. HOVNIANIAN ON ASPIRE AT APRICOT GROVE (888.408.6590). ASPIRE SCHEDULED FOR GRAND OPENING IN 2Q2020. SELF HELP ENTERPRISES IS UNDERWAY ON STONEGATE VILLAGE WITH 70 APARTMENTS UNDER CONSTRUCTION. ADDITIONAL APARTMENTS IN THE DEVELOPMENT PIPELINE INCLUDE LONDON LANE APARTMENTS RECENTLY APPROVED FOR 96 UNITS
PATTERSON	ZACHARIAS MASTER PLAN	MANY OWNERS, GDR ENGINEERING, INC.	MIX	DP	5,600						5,600		209.892.3414		ZACHARIAS MASTER PLAN	APPROX. 1,200 ACRES. NORTHWEST ANNEXATION INTO THE CITY OF PATTERSON. MIX-USE PROJECT PROPOSING 5,600 RESIDENTIAL UNITS, COMMERCIAL, FUTURE SCHOOL SITE AND 316 ACRES OF INDUSTRIAL USES. EIR IS UNDER DRAFT WITH COMPLETION WITHIN 8 MONTHS TO A YEAR
STANISLAUS COUNTY	DIABLO GRANDE COUNTRY CLUB	WORLD INTERNATIONAL	MIX	FM	2,200	465				1,735			209.892.4663		DIABLO GRANDE	GOLF COURSE AND CLUB HOUSE CLOSED IN 10/2019. PROJECT IS FOR SALE
GUSTINE	SOUTHEAST ANNEXATION	CITY OF GUSTINE	SF	DP	300						300		209.854.6471			250 ACRES NEAR SULLIVAN AND MILLS ROADS. PER CITY, ANNEXATION IS 3/4 OF THE WAY THROUGH APPROVAL PROCESS
TOTALS					11,200	465	0	120	380	4,335	5,900					

RB=RECENTLY BUILT; UC=UNDER CONSTRUCTION; FM=FINAL MAP APPROVAL; TM=TENTATIVE MAP APPROVAL; DP=DESIGN PLAN CHECK
 Derrigo Studies / City of Patterson

CHAPTER IV

RETAIL GAP ANALYSIS

RETAIL GAP ANALYSIS REPORT ON THE CITY OF PATTERSON, STANISLAUS COUNTY, CALIFORNIA

Purpose of Report:

Derrigo Studies is a consulting firm with over thirty years of experience in land development advisory on commercial and residential uses. We specialize in all aspects of retail market analysis providing reports to help our clients recruit prospective retail tenants. A “Retail Performance Analysis” is one such report specializing in defining the pattern of retail spending for a specific trade area. For the City of Patterson, a Community Retail Tenant Trade Area has been defined and data was gathered from Esri and Info Group.

Basis of Analysis

Retail spending potential is defined by a proprietary model based on a trade area’s population, income, and consumer spending patterns. Using the algorithms within this model, we are then able to determine the extent to which a community is or is not capturing its sales potential based upon retail sales data published by Esri, a private demographic and data vendor.

By analyzing this data per retail group in the trade area, we can further define which retail groups are not fully capturing the available dollars “leakage” verses those that are exhibiting a “surplus”. A retail sales surplus indicates that a community pulls consumers and retail dollars in from outside the trade area, thereby serving as a regional market. Conversely, when local demand for a specific product is not being met within a trade area, consumers are going elsewhere to shop creating retail leakage. Retail strategies can be developed for specific retail sectors by analyzing the estimation of retail surpluses and leakages, giving retailers a snapshot of the relative strengths and weaknesses of a community’s retail market. Generally, attraction or surplus groups signal particular strengths of a retail market, while leakage groups signal particular weaknesses.

A Retail Performance Analysis provides important data that can be utilized to setup a retail development strategy. By determining those retail groups currently not meeting the needs of their community, one can begin to establish an affective retailer recruitment strategy.

Retail Industry Groups

The following retail industry groups are from the updated six-digit North American Industry Classification System (NAICS). Data from various sources are compiled from millions of businesses and classified to determine average sales per retail group.

Automobile Dealers, Parts, and Accessories

New and used car dealers, auto supply stores including accessories, parts, and tires. Dealers of other motor vehicles are also included such as boat dealers, motorcycle, and recreational vehicles.

Furniture and Home Furnishings Stores

Furniture stores, floor covering retailers, window treatment stores, and home furnishings facilities are included in this group.

Electronics and Appliances Stores

This category includes stores that sell electronics and appliances.

Building Materials, Garden Equipment, and Supply Stores

The building material group includes home centers, paint and wallpaper stores, hardware stores, other building material dealers, lawn and garden equipment and supplies stores, outdoor power equipment retailers and finally, nursery, garden center and farm supply stores.

Food & Beverage Stores

Retailer uses in this category are supermarkets and other grocery stores, convenience stores, meat markets, fish and seafood markets, fruit and vegetables markets, other specialty food stores, baked good facilities, confectionery and nut retailers. Beer, wine and liquor stores are also included in this group.

Health and Personal Care Stores

Pharmacies, drug stores, cosmetics, beauty supply, perfume stores, optical goods, food (health) supplement stores, and personal care stores are all considered in this group.

Gasoline Stations

Covered in his group are gas stations and gas stations with convenience stores.

Apparel and Apparel Accessories Stores

Category includes all clothing stores, shoe stores, clothing accessory stores, and jewelry, luggage, and leather goods retailers.

Sporting Goods, Hobby, Book, and Music Stores

Retail uses included in this category are sporting good stores, hobby, toy and game retailers, sewing, needlework, musical instrument, and supply stores along with bookstores and newsstands / dealers.

General Merchandise Stores

Department and discount department stores, warehouse clubs, supercenters, and all other general merchandise stores are included in this category.

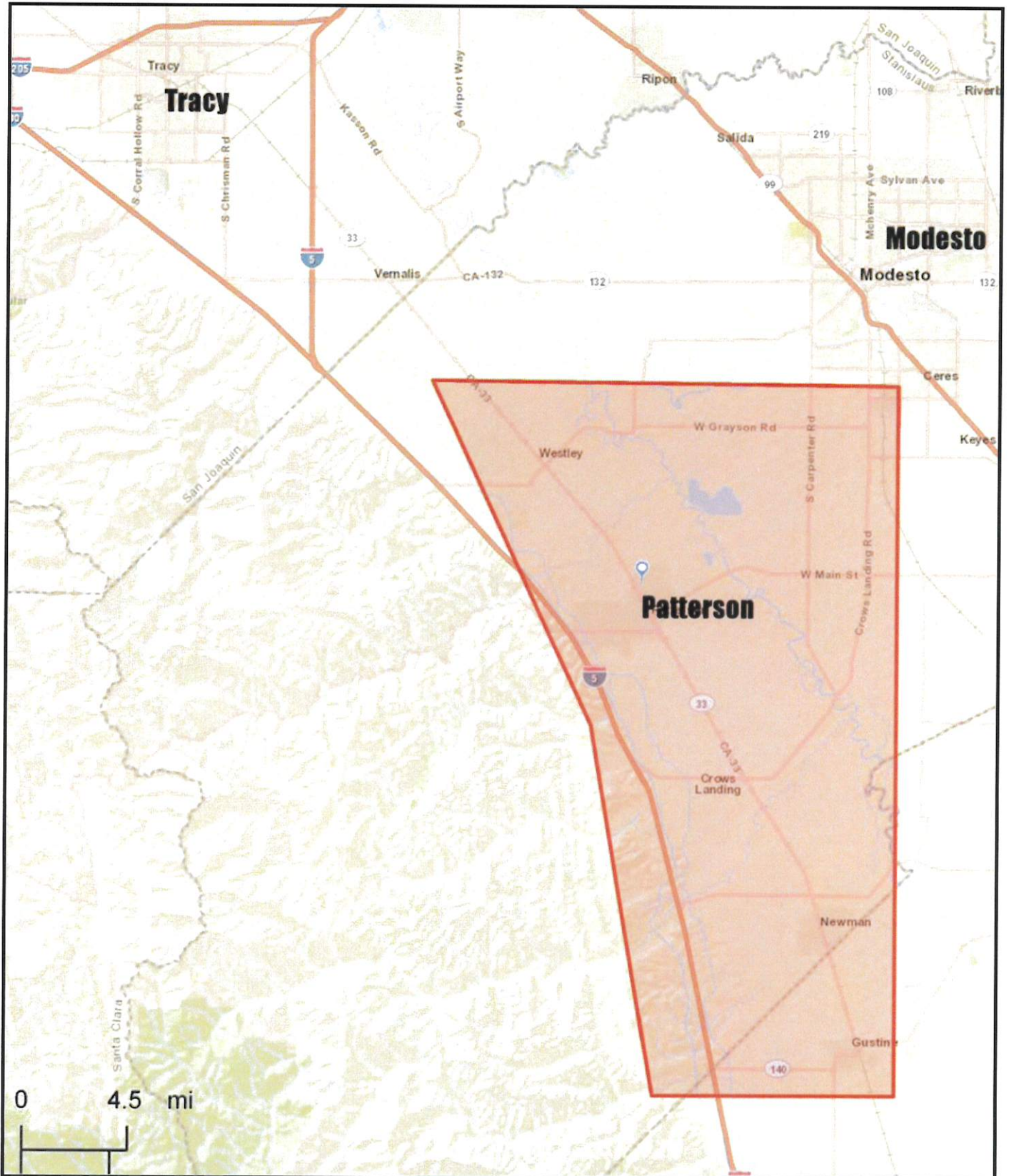
Miscellaneous Store Retailers

Retailers included in this group are florists, office supplies, stationery, gift, novelty and souvenir stores, used merchandise, pet and pet supplies, art dealers, manufactured (mobile) home dealers, tobacco stores and all other miscellaneous store retailers.

Food Services and Drinking Places

This group includes all restaurants, drinking places, and caterers.

Community Retail Tenant Trade Area Map Patterson, California



Retail Sector Summary Chart



City of Patterson, Stanislaus County, California

Primary Retail Trade Area

Trade Area Demographic Summary

2019 Population	52,294
2019 Households	15,301
2019 Median Disposable Income	\$49,689
2019 Per Capita Income	\$22,239

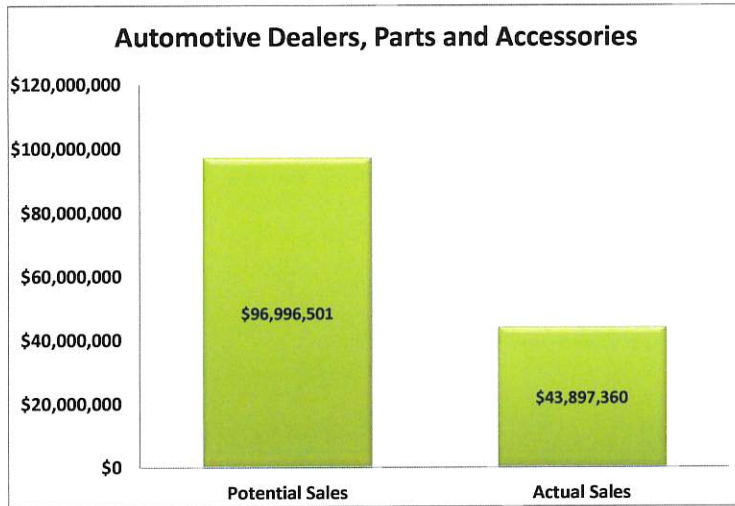
Retail Industry Summary	NAICS Code	Demand (Potential Sales)	Supply (Actual Sales)	Retail Gap	% Surplus/Leakage
Total Retail Trade and Food & Drink	44-45, 722	\$507,528,236	\$391,264,317	-\$116,263,919	-22.9%
Total Retail Trade	44-45	\$459,225,233	\$358,913,977	-\$100,311,256	-21.8%
Total Food & Drink	722	\$48,303,004	\$32,350,340	-\$15,952,664	-33.0%
Retail Industry Group	NAICS Code	Demand (Potential Sales)	Supply (Actual Sales)	Retail Gap	% Surplus/Leakage
Motor Vehicle & Parts Dealers	441	\$96,996,501	\$43,897,360	-\$53,099,141	-54.7%
Automobile Dealers	4411	\$76,879,802	\$35,835,957	-\$41,043,845	-53.4%
Other Motor Vehicle Dealers	4412	\$11,904,109	\$0	-\$11,904,109	-100.0%
Auto Parts, Accessories & Tire Stores	4413	\$8,212,567	\$8,061,404	-\$151,163	-1.8%
Furniture & Home Furnishings Stores	442	\$16,573,161	\$12,588,544	-\$3,984,617	-24.0%
Furniture Stores	4421	\$8,595,485	\$273,230	-\$8,322,255	-96.8%
Home Furnishings Stores	4422	\$7,977,676	\$12,315,314	\$4,337,638	54.4%
Electronics & Appliance Stores	443	\$16,793,947	\$2,985,635	-\$13,808,312	-82.2%
Bldg Materials, Garden Equip. & Supply Stores	444	\$27,846,949	\$21,381,162	-\$6,465,787	-23.2%
Bldg Material & Supplies Dealers	4441	\$26,072,449	\$14,803,271	-\$11,269,178	-43.2%
Lawn & Garden Equip & Supply Stores	4442	\$1,774,500	\$6,577,891	\$4,803,391	270.7%
Food & Beverage Stores	445	\$74,029,062	\$71,987,485	-\$2,041,577	-2.8%
Grocery Stores	4451	\$63,499,973	\$66,742,782	\$3,242,809	5.1%
Specialty Food Stores	4452	\$5,273,219	\$3,716,524	-\$1,556,695	-29.5%
Beer, Wine & Liquor Stores	4453	\$5,255,870	\$1,528,178	-\$3,727,692	-70.9%
Health & Personal Care Stores	446,4461	\$31,349,348	\$40,140,532	\$8,791,184	28.0%
Gasoline Stations	447,4471	\$42,531,064	\$82,419,739	\$39,888,675	93.8%
Clothing & Clothing Accessories Stores	448	\$31,906,008	\$2,829,586	-\$29,076,422	-91.1%
Clothing Stores	4481	\$22,943,162	\$1,935,165	-\$21,007,997	-91.6%
Shoe Stores	4482	\$4,069,996	\$0	-\$4,069,996	-100.0%
Jewelry, Luggage & Leather Goods Stores	4483	\$4,892,849	\$894,421	-\$3,998,428	-81.7%
Sporting Goods, Hobby, Book & Music Stores	451	\$14,473,493	\$1,999,075	-\$12,474,418	-86.2%
Sporting Goods/Hobby/Musical Instgr Stores	4511	\$12,563,673	\$1,999,075	-\$10,564,598	-84.1%
Book, Periodical & Music Stores	4512	\$1,909,820	\$0	-\$1,909,820	-100.0%
General Merchandise Stores	452	\$76,629,648	\$68,126,051	-\$8,503,597	-11.1%
Department Stores Excluding Leased Depts.	4521	\$45,487,608	\$62,714,000	\$17,226,392	37.9%
Other General Merchandise Stores	4529	\$31,142,040	\$5,412,051	-\$25,729,989	-82.6%
Miscellaneous Store Retailers	453	\$17,097,793	\$10,558,810	-\$6,538,983	-38.2%
Florists	4531	\$690,197	\$534,071	-\$156,126	-22.6%
Office Supplies, Stationery & Gift Stores	4532	\$3,826,677	\$1,323,890	-\$2,502,787	-65.4%
Used Merchandise Stores	4533	\$1,745,149	\$4,368,124	\$2,622,975	150.3%
Other Miscellaneous Store Retailers	4539	\$10,835,770	\$4,332,725	-\$6,503,045	-60.0%
Food Services & Drinking Places	722	\$48,303,004	\$32,350,340	-\$15,952,664	-33.0%
Special Food Services	7223	\$958,962	\$142,768	-\$816,194	-85.1%
Drinking Places - Alcoholic Beverages	7224	\$978,073	\$162,755	-\$815,318	-83.4%
Restaurants/Other Eating Places	7225	\$46,365,968	\$32,044,817	-\$14,321,151	-30.9%

Data Note: The Surplus/Leakage Factor presents a snapshot of retail opportunity. This is a measure of the relationship between supply and demand. A positive value represents "surplus" of retail sales and a negative value represents a "leakage" of retail sales. For more information on the Retail MarketPlace data, please view the methodology statement at <http://www.esri.com/library/whitepapers/pdfs/esri-data-retail-marketplace.pdf>.

Source: Esri and Info Group. Esri 2019 Updated Demographics

Motor Vehicle & Parts Dealers

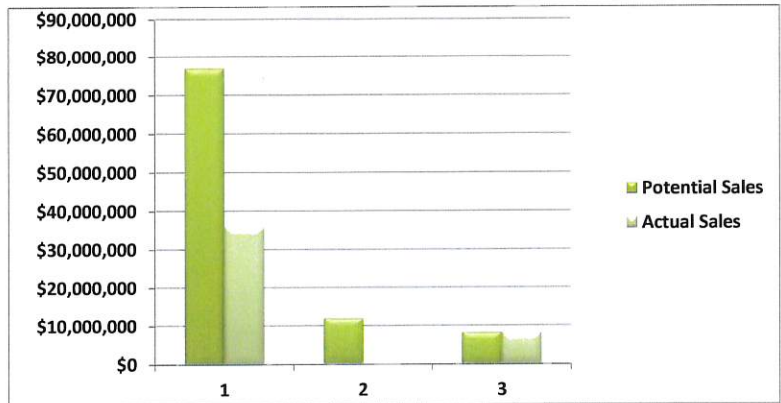
New and used car dealers, auto supply stores including accessories, parts and tires. Dealers of other motor vehicles are also included such as boat dealers, motorcycle and recreational vehicles.



Patterson's Community Retail Tenant Trade Area has a retail leakage of an estimated **\$ (53,099,141)**

Retail Leakage indicates that potential retail sales are greater than actual retail sales for the trade area. For a breakdown of the sub-groups within this category, see chart below.

		Potential Sales	Actual Sales
1	Automobile Dealers	\$76,879,802	\$35,835,957
2	Other Auto Dealers	\$11,904,109	\$0
3	Auto Parts, Accessories & Tire Stores	\$8,212,567	\$8,061,404



For More Information Contact:

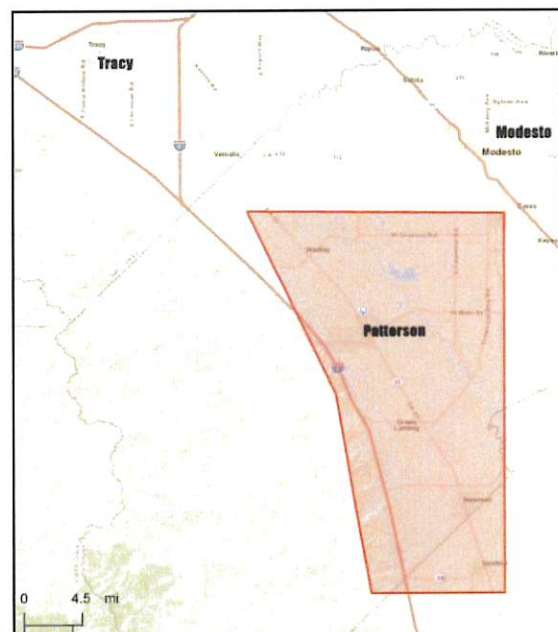


City of Patterson
 1 Plaza, P.O. Box 667
 Patterson, CA 95363
 209.895.8024

Prepared By: Derrigo Studies / 2019 / The information contained herein is obtained from sources that we deem reliable. We have no reason to doubt its accuracy but we do not guarantee it.

Source: Derrigo Studies / Esri and Info Group / Esri 2019 Updated Demographics / Delorme

Community Retail Tenant Trade Area, City of Patterson



Furniture & Home Furnishings Stores

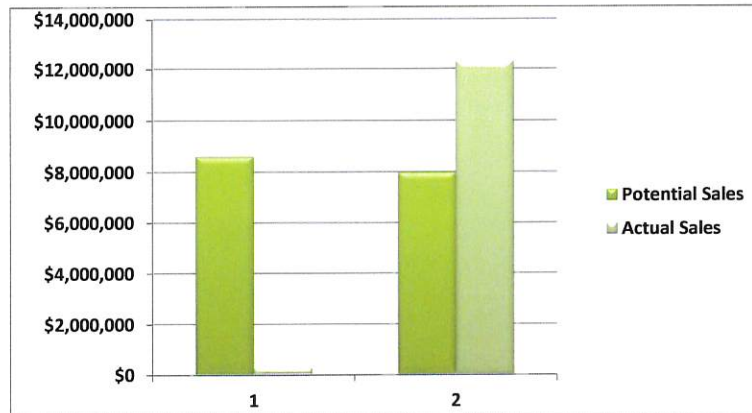
Furniture stores, floor covering retailers, window treatment stores and home furnishing facilities are all included in this group.



Patterson's Community Retail Tenant Trade Area has a retail leakage of an estimated **\$ (3,984,617)**

Retail Leakage indicates that potential retail sales are greater than actual retail sales for the trade area. For a breakdown of the sub-groups within this category, see chart below.

	Potential Sales	Actual Sales
1 Furniture Stores	\$8,595,485	\$273,230
2 Home Furnishings Stores	\$7,977,676	\$12,315,314



For More Information Contact:

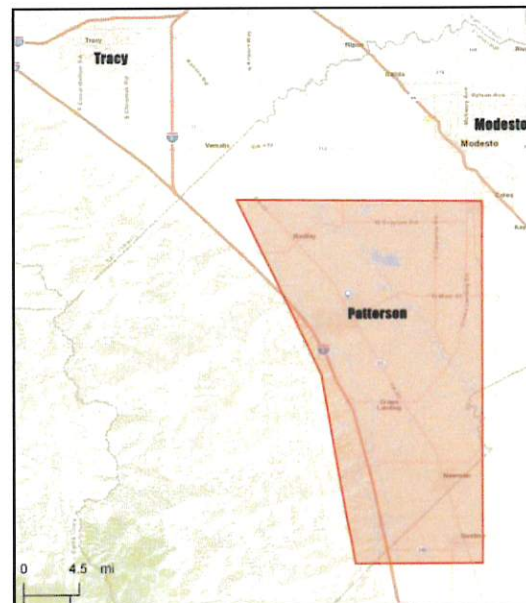


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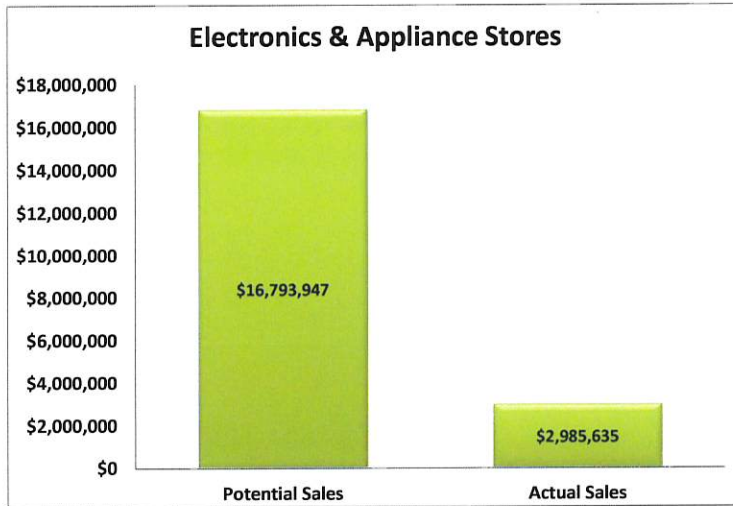
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Community Retail Tenant Trade Area, City of Patterson



Electronics & Appliance Stores

This category includes stores that sell electronics and appliances.



Patterson's Community Retail Tenant Trade Area has a retail leakage of an estimated \$ (13,808,312)

Retail Leakage indicates that potential retail sales are greater than actual retail sales for the trade area.

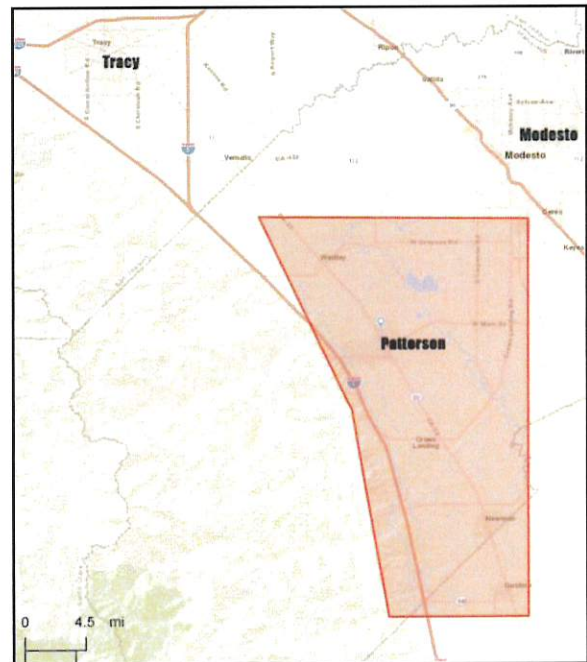
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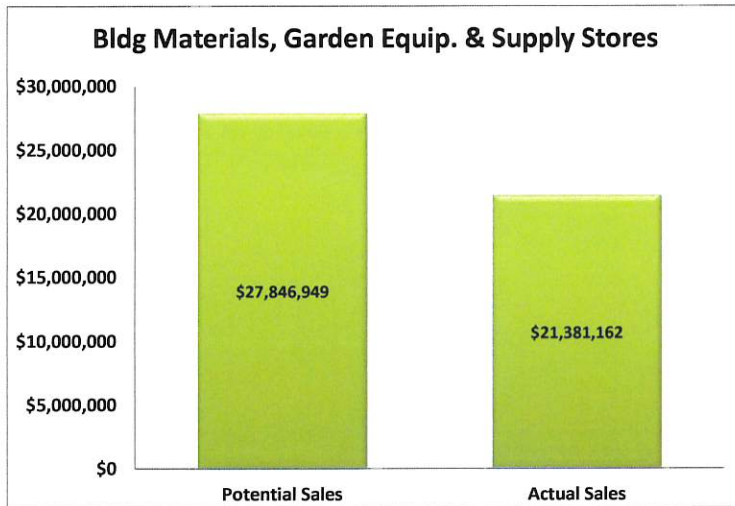
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Community Retail Tenant Trade Area, City of Patterson



Bldg Materials, Garden Equip. & Supply Stores

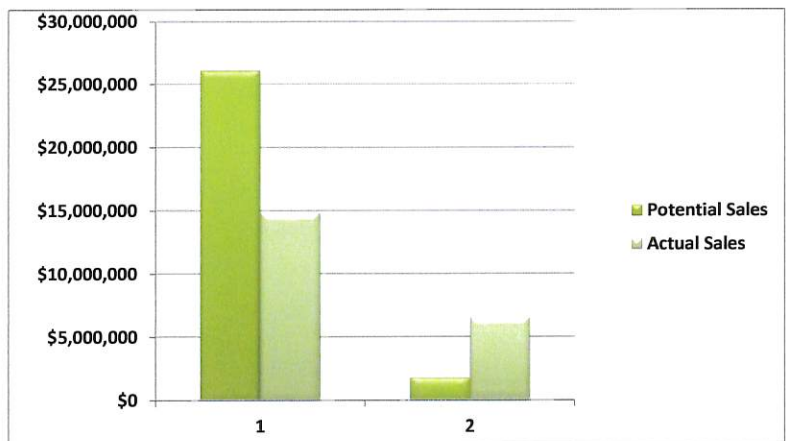
The building material group includes home centers, paint and wallpaper stores, hardware stores, other building material dealers, lawn and garden equipment and supplies stores, outdoor power equipment retailers and finally, nursery, garden center and farm supply stores.



Patterson's Community Retail Tenant Trade Area has a retail leakage of an estimated
\$ (6,465,787)

Retail Leakage indicates that potential retail sales are greater than actual retail sales for the trade area. For a breakdown of the sub-groups within this category, see chart below.

		Potential Sales	Actual Sales
1	Bldg Material & Supply Dealer	\$26,072,449	\$14,803,271
2	Lawn & Garden & Supply Stores	\$1,774,500	\$6,577,891

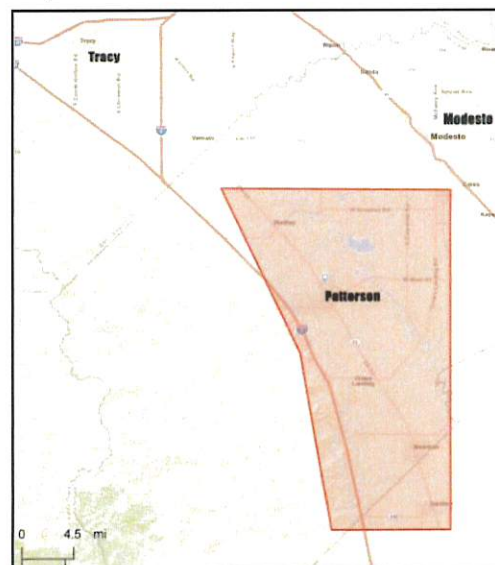


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Community Retail Tenant Trade Area, City of Patterson

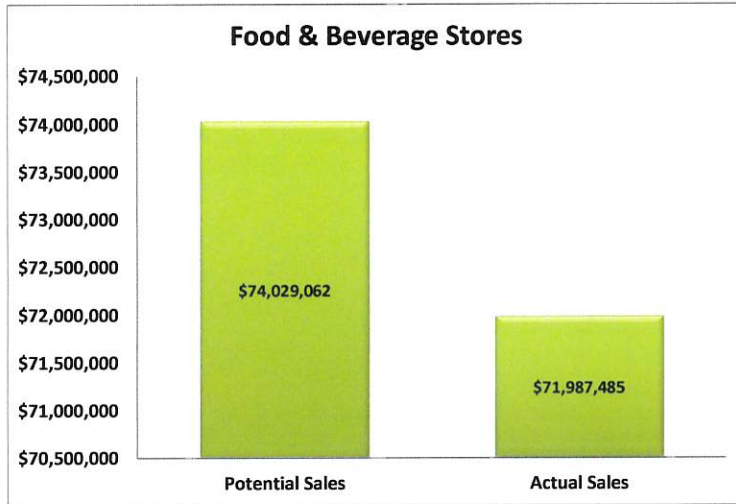


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Food and Beverage Stores

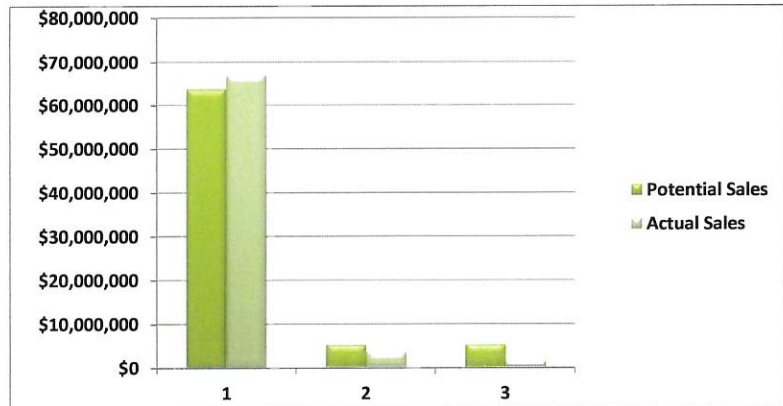
Grocery Stores, Specialty Food Stores, Beer, Wine & Liquor Stores



Patterson's Community Retail Tenant Trade Area has a retail surplus of an estimated
\$ (2,041,577)

Retail Leakage indicates that potential retail sales are greater than actual retail sales for the trade area. For a breakdown of the sub-groups within this category, see chart below.

		Potential Sales	Actual Sales
1	Grocery Stores	\$63,499,973	\$66,742,782
2	Specialty Food Stores	\$5,273,219	\$3,716,524
3	Beer, Wine & Liquor Stores	\$5,255,870	\$1,528,178



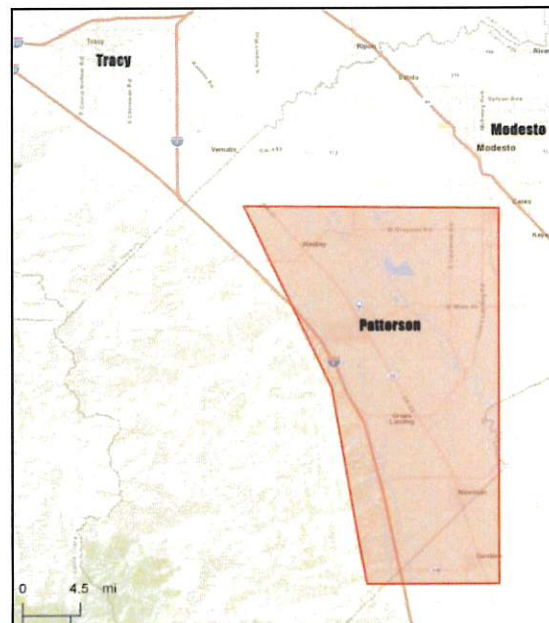
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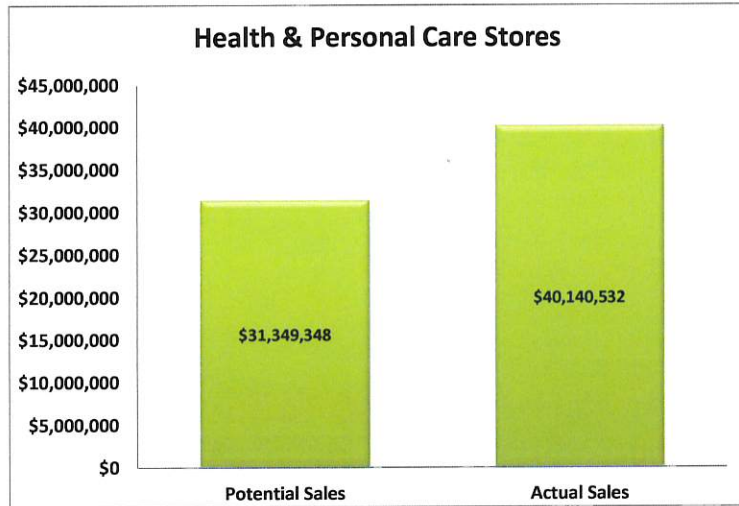
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Community Retail Tenant Trade Area, City of Patterson



Health & Personal Care Stores

Pharmacies, drug stores, cosmetics, beauty supply, perfume stores, optical goods, food (health) supplement stores and personal care stores are all considered in this group.



Patterson's Community Retail Tenant Trade Area
has a retail surplus of an estimated
\$ 8,791,184

Retail Surplus indicates that actual retail sales
are greater than potential retail sales for the
trade area.

For More Information Contact:

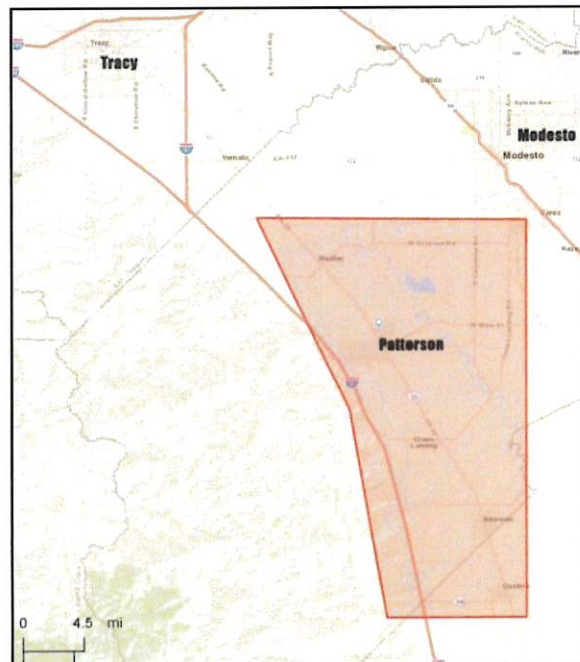


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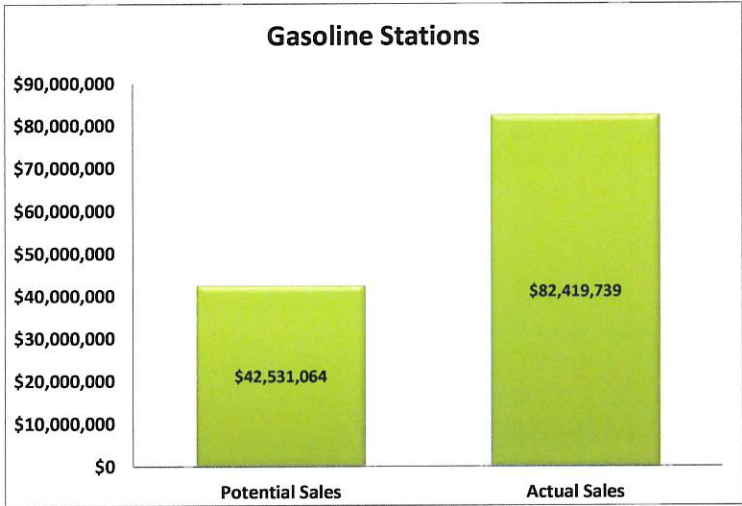
Source: Derrigo Studies / Esri and Info Group / Esri 2019 Updated Demographics / Delorme

Community Retail Tenant Trade Area, City of Patterson



Gasoline Stations

Included in this retail group are gas stations and gas stations with convenience stores.



Patterson's Community Retail Tenant Trade Area has a retail surplus of an estimated **\$ 39,888,675**

Retail Surplus indicates that actual retail sales are greater than potential retail sales for the trade area.

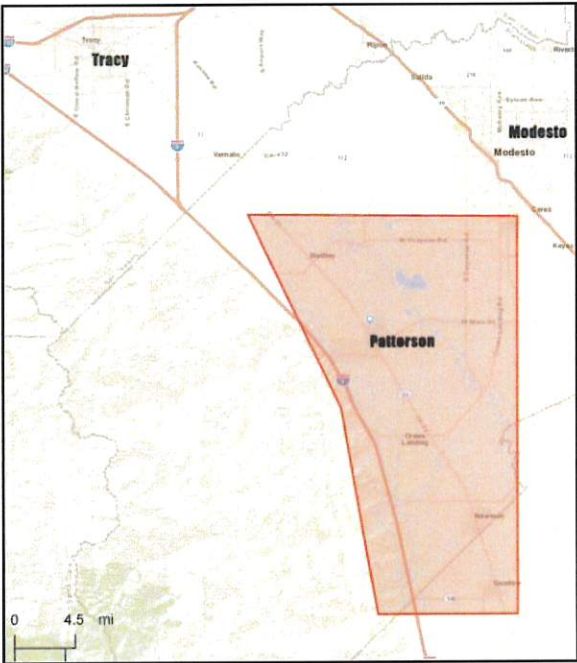
For More Information Contact:



City of Patterson
1 Plaza, P.O. Box 667
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209.895.8024

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Community Retail Tenant Trade Area, City of Patterson



Clothing & Clothing Accessories Stores

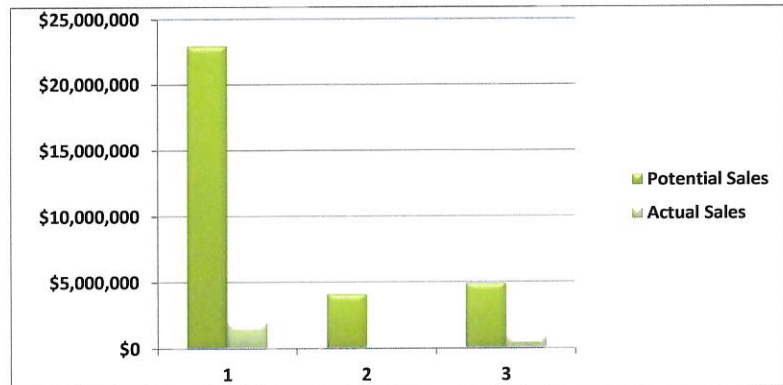
Category includes all clothing stores, shoe stores, clothing accessory stores, and jewelry, luggage and leather goods retailers.



Patterson's Community Retail Tenant Trade Area has a retail leakage of an estimated
\$ (29,076,422)

Retail Leakage indicates that potential retail sales are greater than actual retail sales for the trade area. For a breakdown of the sub-groups within this category, see chart below.

	Potential Sales	Actual Sales
1 Apparel Stores	\$22,943,162	\$1,935,165
2 Shoe Stores	\$4,069,996	\$0
3 Jewelry, Luggage & Leather Good Stores	\$4,892,849	\$894,421



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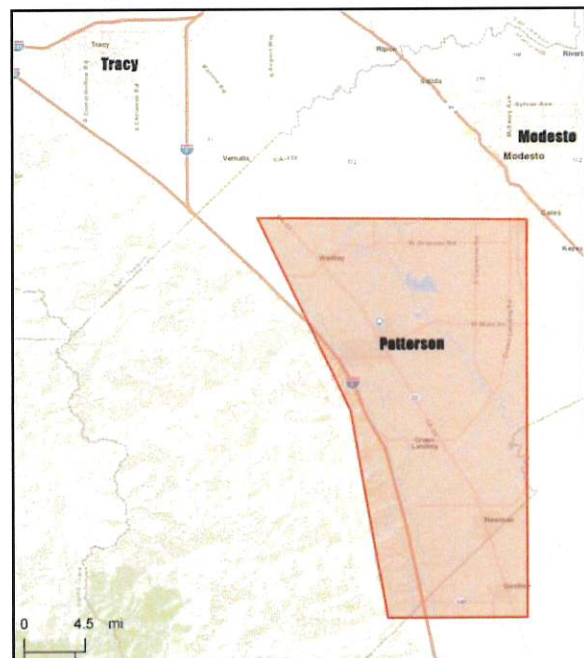
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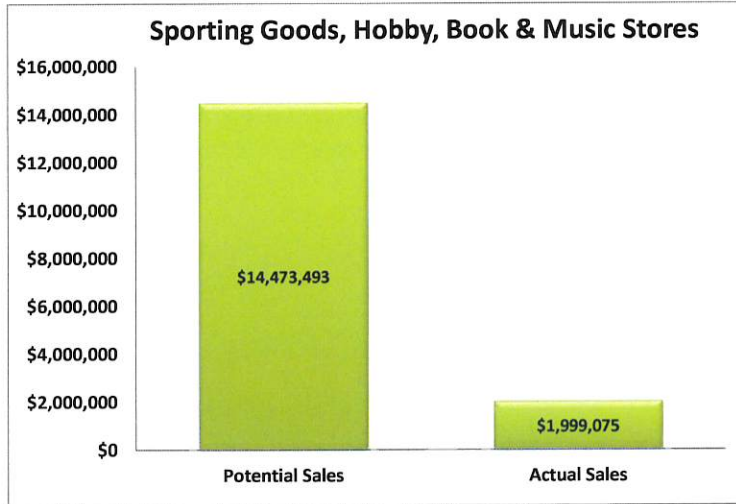
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Community Retail Tenant Trade Area, City of Patterson



Sporting Goods, Hobby, Book & Music Stores

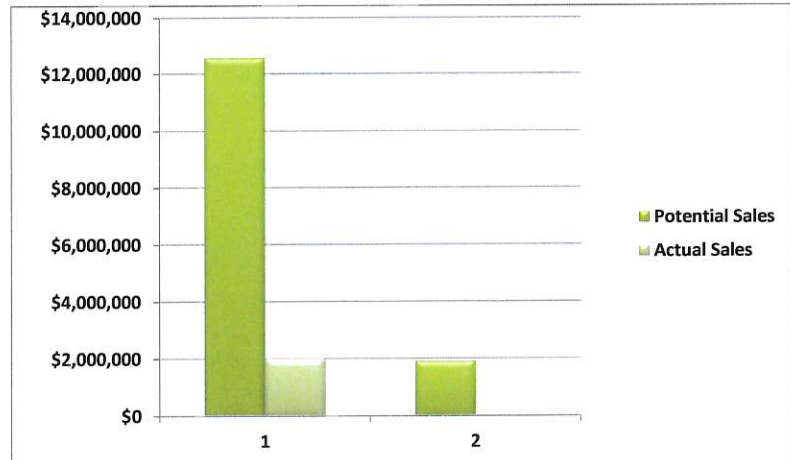
Retail uses included in this category are sporting good stores, hobby, toy and game retailers, sewing, needlework, musical instrument and supply stores along with book stores and newsstands / dealers.



Patterson's Community Retail Tenant Trade Area has a retail leakage of an estimated **\$ (12,474,418)**

Retail Leakage indicates that potential retail sales are greater than actual retail sales for the trade area. For a breakdown of the sub-groups within this category, see chart below.

		Potential Sales	Actual Sales
1	Sporting Goods/ Hobby /Musical Instgr Stores	\$12,563,673	\$1,999,075
2	Book, Periodical & Music Stores	\$1,909,820	\$0



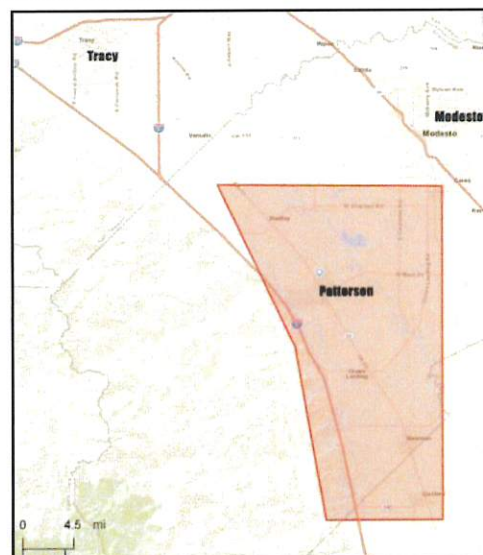
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Community Retail Tenant Trade Area, City of Patterson



General Merchandise Stores

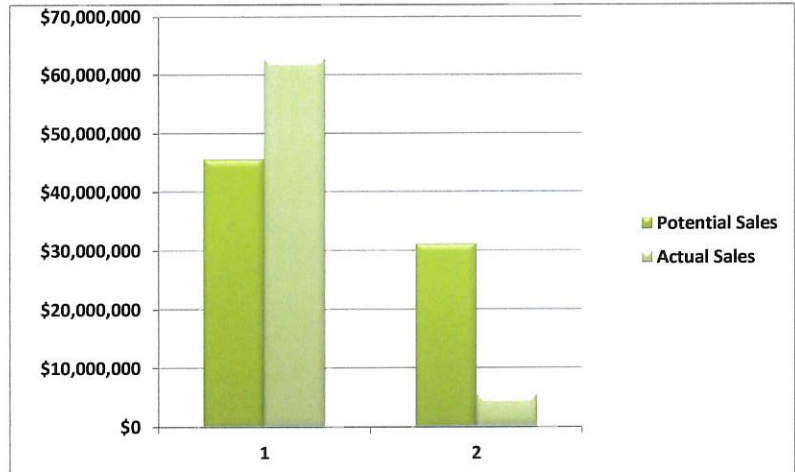
Department and discount department stores, warehouse clubs, supercenters, and all other general merchandise stores are included in this category.



Patterson's Community Retail Tenant Trade Area has a retail leakage of an estimated **\$ (8,503,597)**

Retail Leakage indicates that potential retail sales are greater than actual retail sales for the trade area. For a breakdown of the sub-groups within this category, see chart below.

		Potential Sales	Actual Sales
1	Department Stores Excluding Leased Depts.	\$45,487,608	\$62,714,000
2	Other General Merchandise Stores	\$31,142,040	\$5,412,051



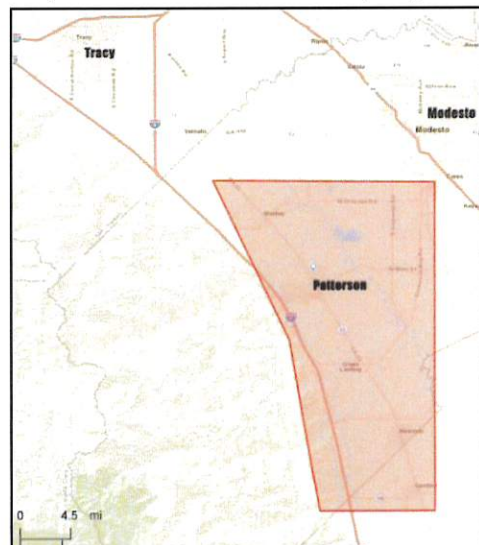
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Community Retail Tenant Trade Area, City of Patterson



Miscellaneous Store Retailers

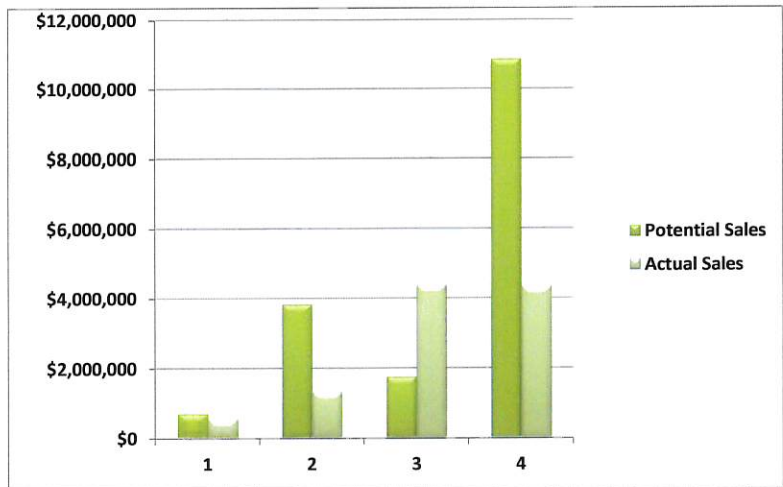
Retailers included in this group are florists, office supplies, stationery, gift, novelty and souvenir stores, used merchandise, pet and pet supplies, art dealers, manufactured (mobile) home dealers, tobacco stores and all other miscellaneous store retailers.



Patterson's Community Retail Tenant Trade Area has a retail leakage of an estimated
\$ (6,538,983)

Retail Leakage indicates that potential retail sales are greater than actual retail sales for the trade area. For a breakdown of the sub-groups within this category, see chart below.

		Potential Sales	Actual Sales
1	Florists	\$690,197	\$534,071
2	Office Supplies, Stationery & Gift Stores	\$3,826,677	\$1,323,890
3	Used Merchandise Stores	\$1,745,149	\$4,368,124
4	Other Miscellaneous Store Retailers	\$10,835,770	\$4,332,725



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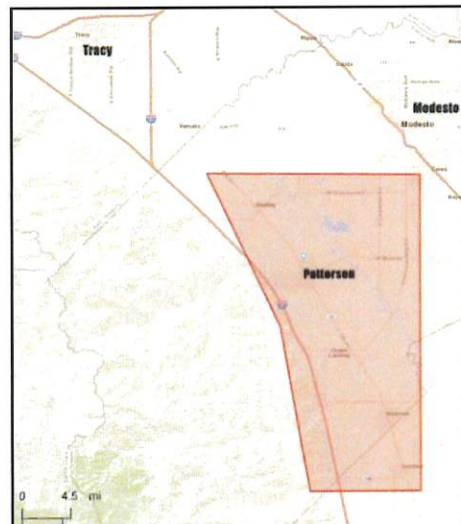


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Community Retail Tenant Trade Area, City of Patterson



Food Services & Drinking Places

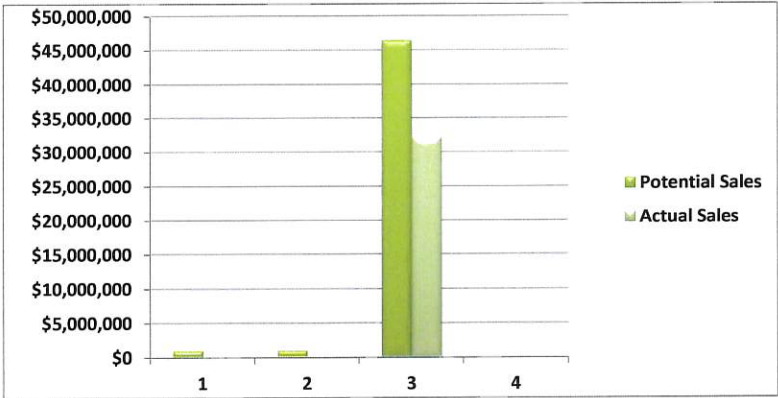
This group includes all restaurants, drinking places and caterers.



Patterson's Community Retail Tenant Trade Area has a retail leakage of an estimated \$ (15,952,664)

Retail Leakage indicates that potential retail sales are greater than actual retail sales for the trade area. For a breakdown of the sub-groups within this category, see chart below.

		Potential Sales	Actual Sales
1	Special Food Services	\$958,962	\$142,768
2	Drinking Places - Alcoholic	\$978,073	\$162,755
3	Restaurants / Other Eating	\$46,365,968	\$32,044,817



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