

CITY OF
HAYWARD
HEART OF THE BAY

**Retail Market Analysis:
Summary of Findings**

Doug Svensson, President of Applied Development Economics
Peter Cheng, Senior Associate

CEDC March 18, 2013



Retail Market Analysis: Presentation Outline

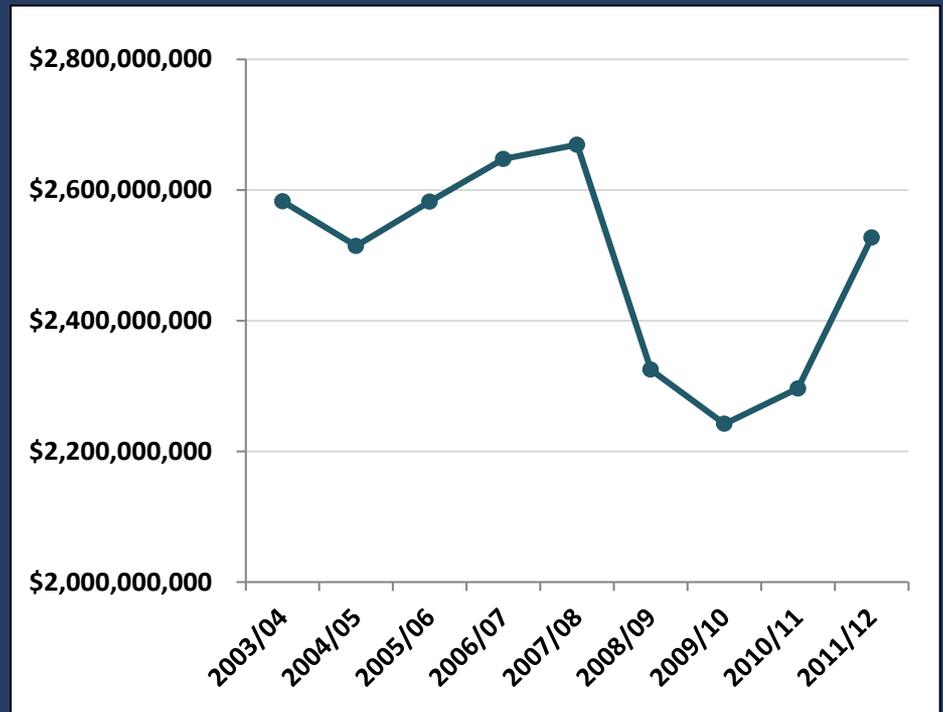
- Recent Trends
- Leakage Analysis
- Subarea Trends
- Business Survey Findings
- Catalyst Sites



Retail Market Analysis: Trends

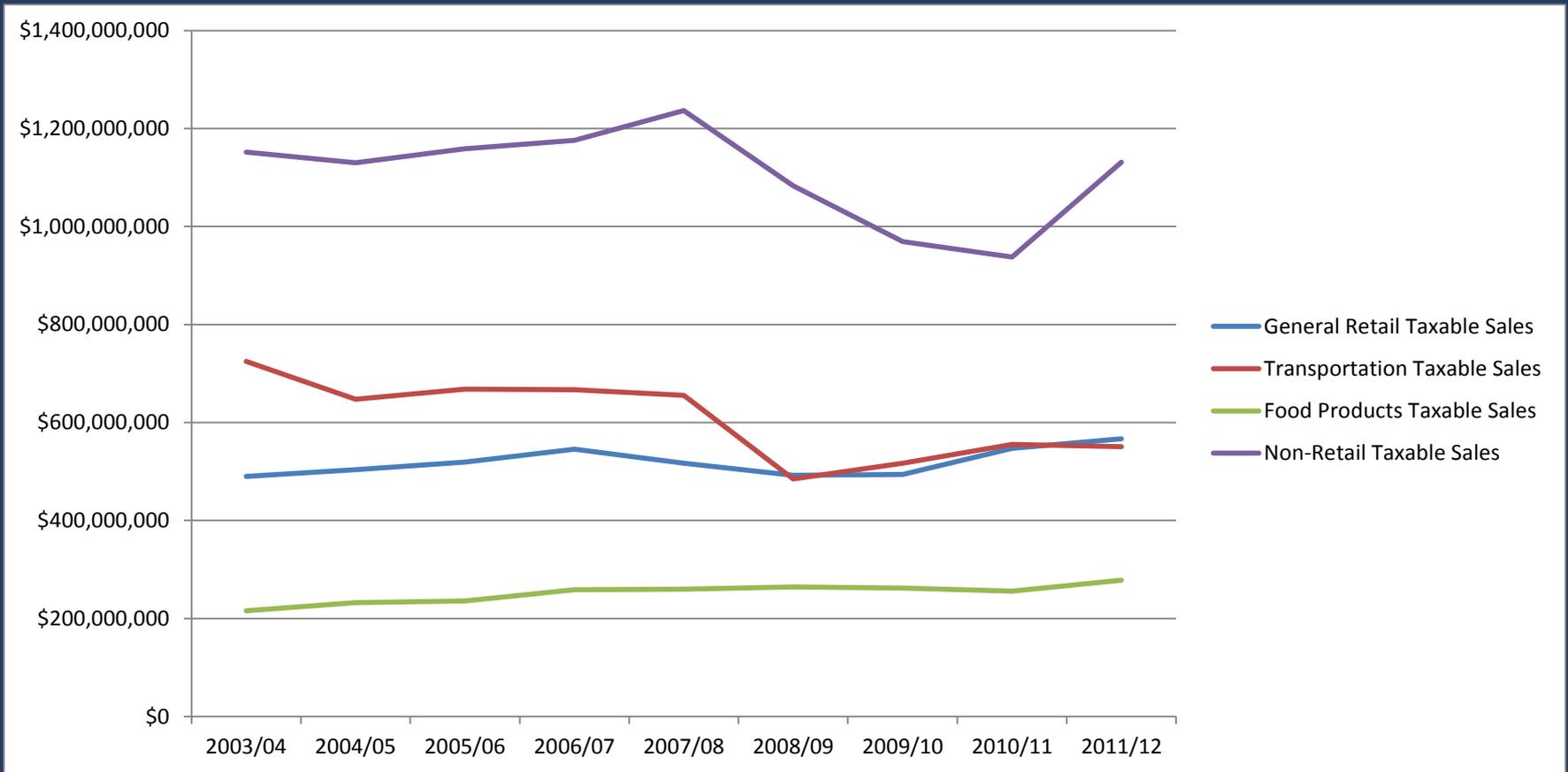
Taxable Sales Trends, 2003/04 to 2011/12 (July to June)

Annual Taxable Sales	Hayward Total	Year-Over-Year Change
2003/04	\$2,582,836,800	n/a
2004/05	\$2,514,522,800	-2.60%
2005/06	\$2,582,220,700	2.70%
2006/07	\$2,647,510,300	2.50%
2007/08	\$2,669,474,100	0.80%
2008/09	\$2,324,912,000	-12.90%
2009/10	\$2,242,071,400	-3.60%
2010/11	\$2,296,267,200	2.40%
2011/12	\$2,527,149,900	10.10%



Retail Market Analysis: Trends

Hayward Taxable Sales by Business Type, 2003/04 to 2011/12



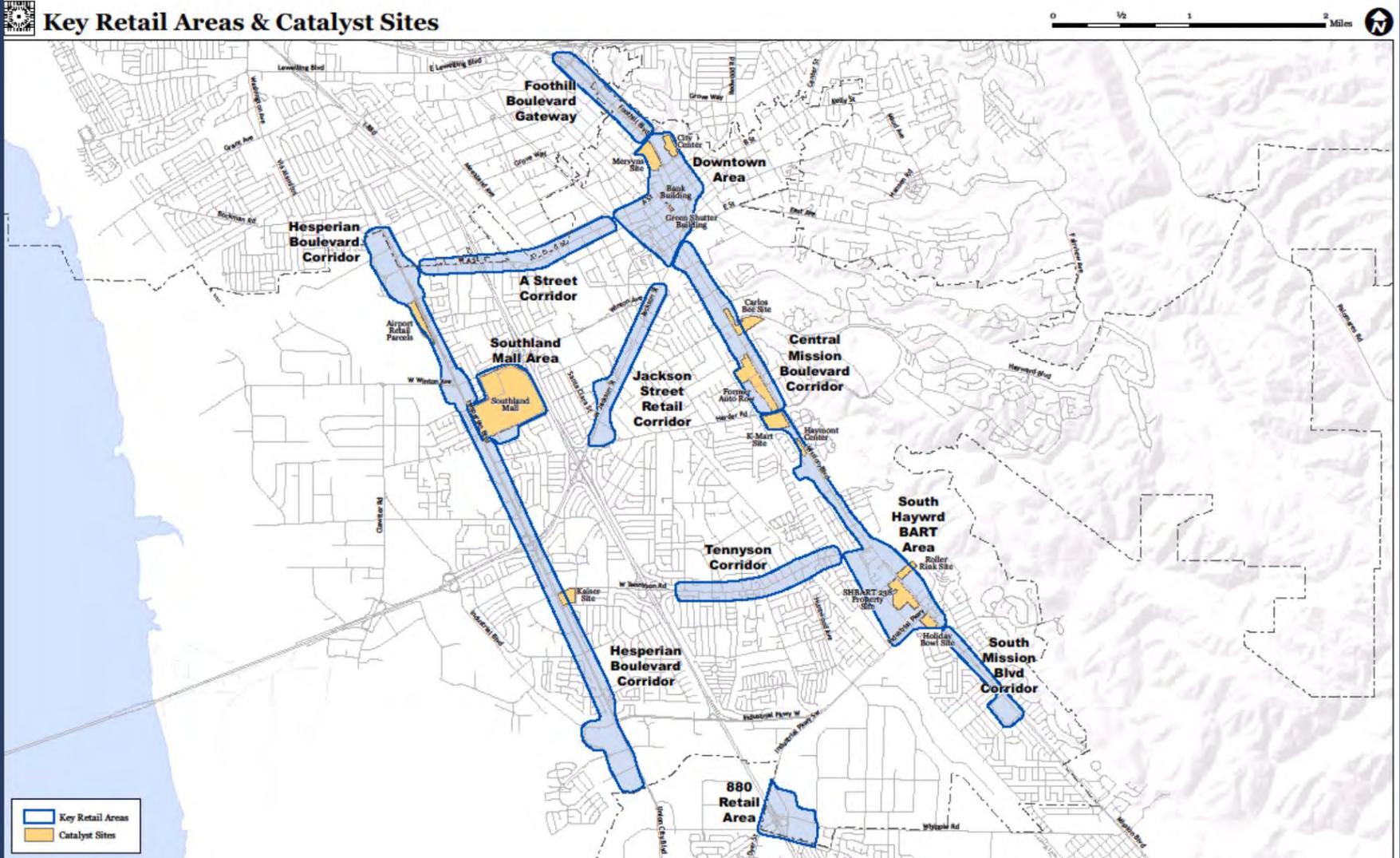
Retail Market Analysis: Existing Leakage

Summary of Potential New Store Attraction/Expansion Supportable by Existing Retail Leakage (2nd Quarter, 2012)

Retail Group	New Stores Supportable by Existing Leakage
Apparel Store Group	2.4
General Merchandise Group	**
Specialty Retail Group	21.4
Office Supplies/Computer Equipment	5.5
Gifts & Novelties	4.5
Sporting Goods	3.3
Florists	3.2
Jewelry	2.8
Records & Music	2.1
Food, Eating and Drinking Group	6.5
Grocery Stores	2.4
Eating Places	4.1
Building Materials and Homefurnishings Group	8.8
Furniture & Home Furnishings	5.3
Household Appliances & Electronics	3.3
Automotive Group	**

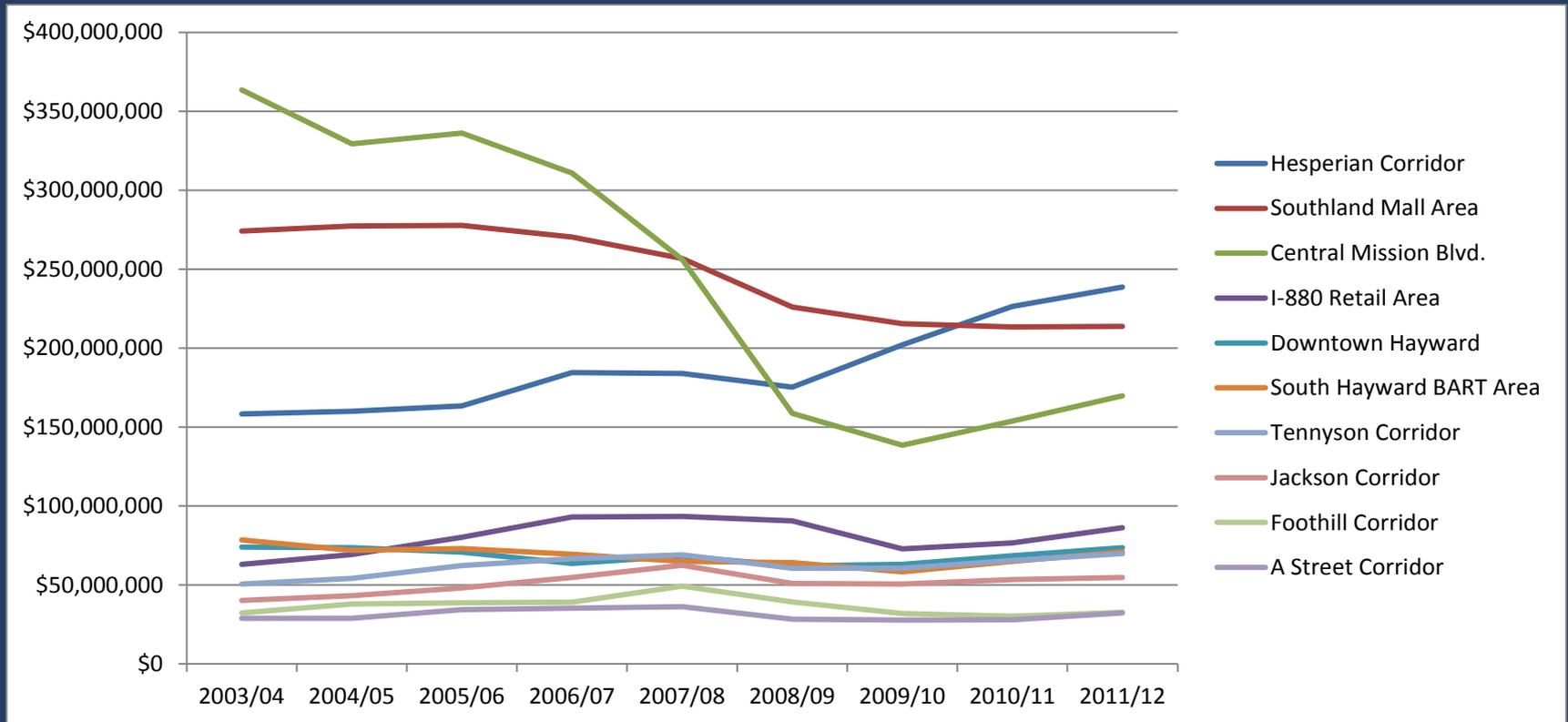


Retail Market Analysis: Subarea and Site Map



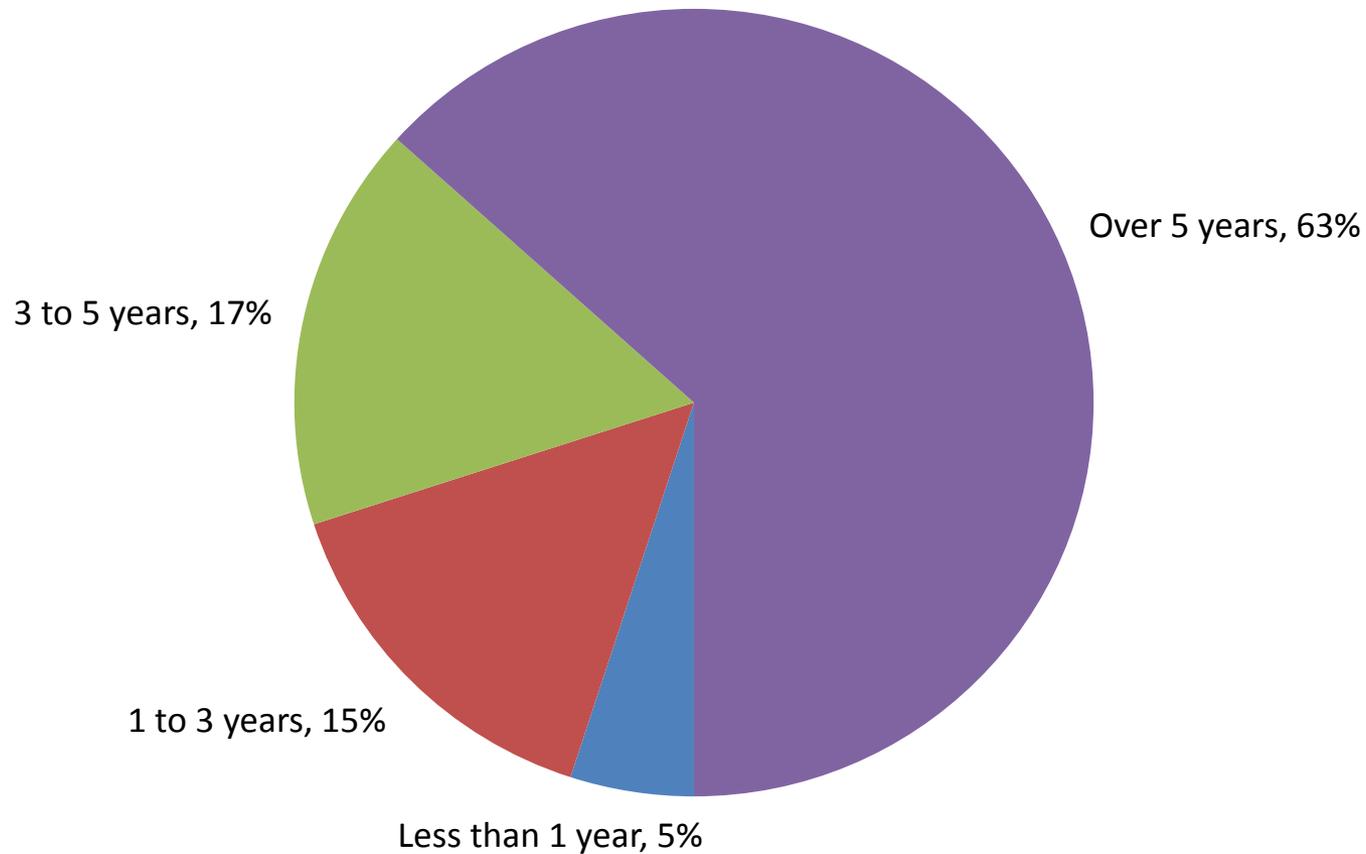
Retail Market Analysis: Trends

Hayward Subarea Taxable Sales Trend, 2003/04 to 2011/12



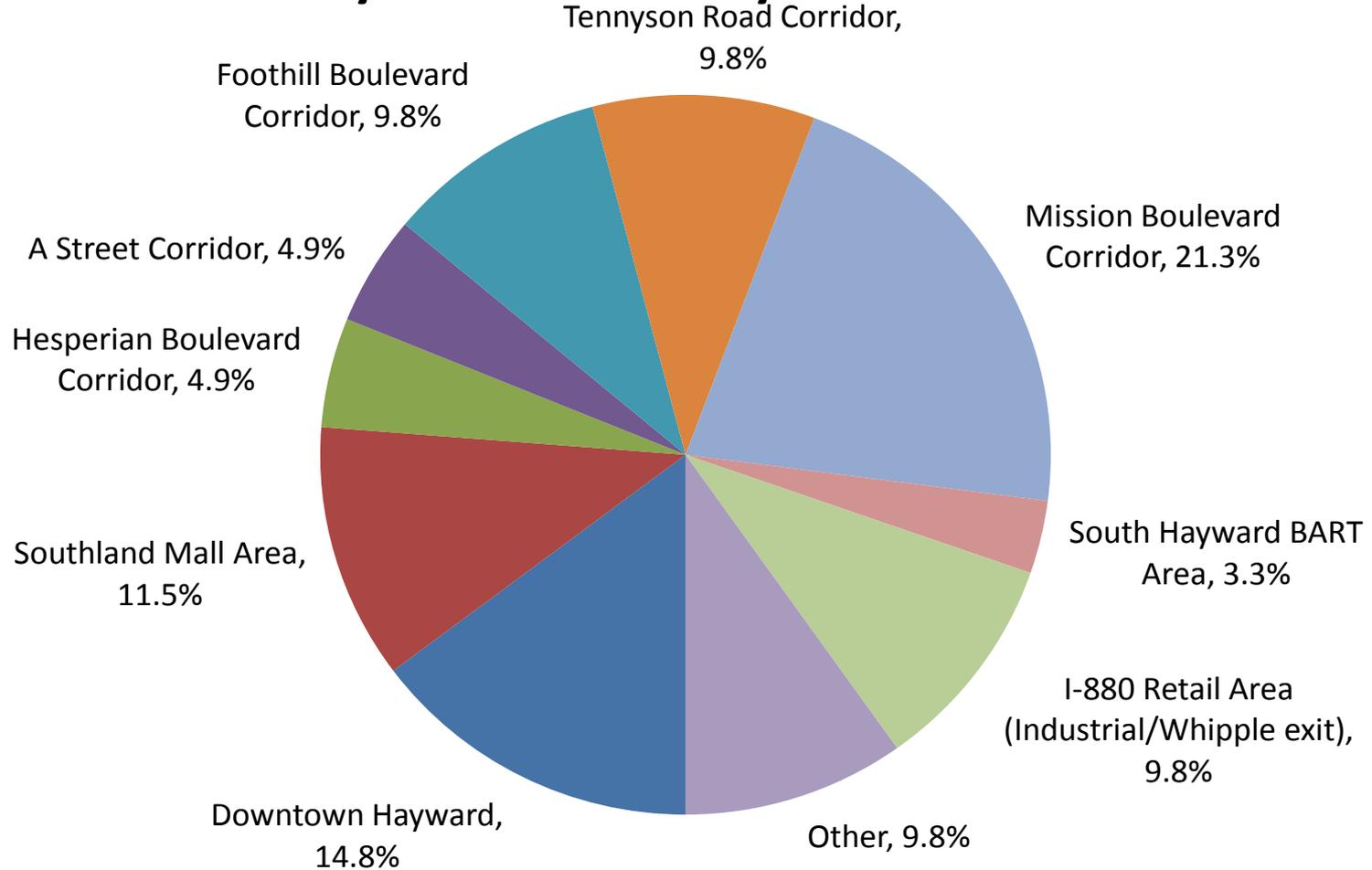
Retail Market Analysis: Survey Findings

How long have you been in business at this location?



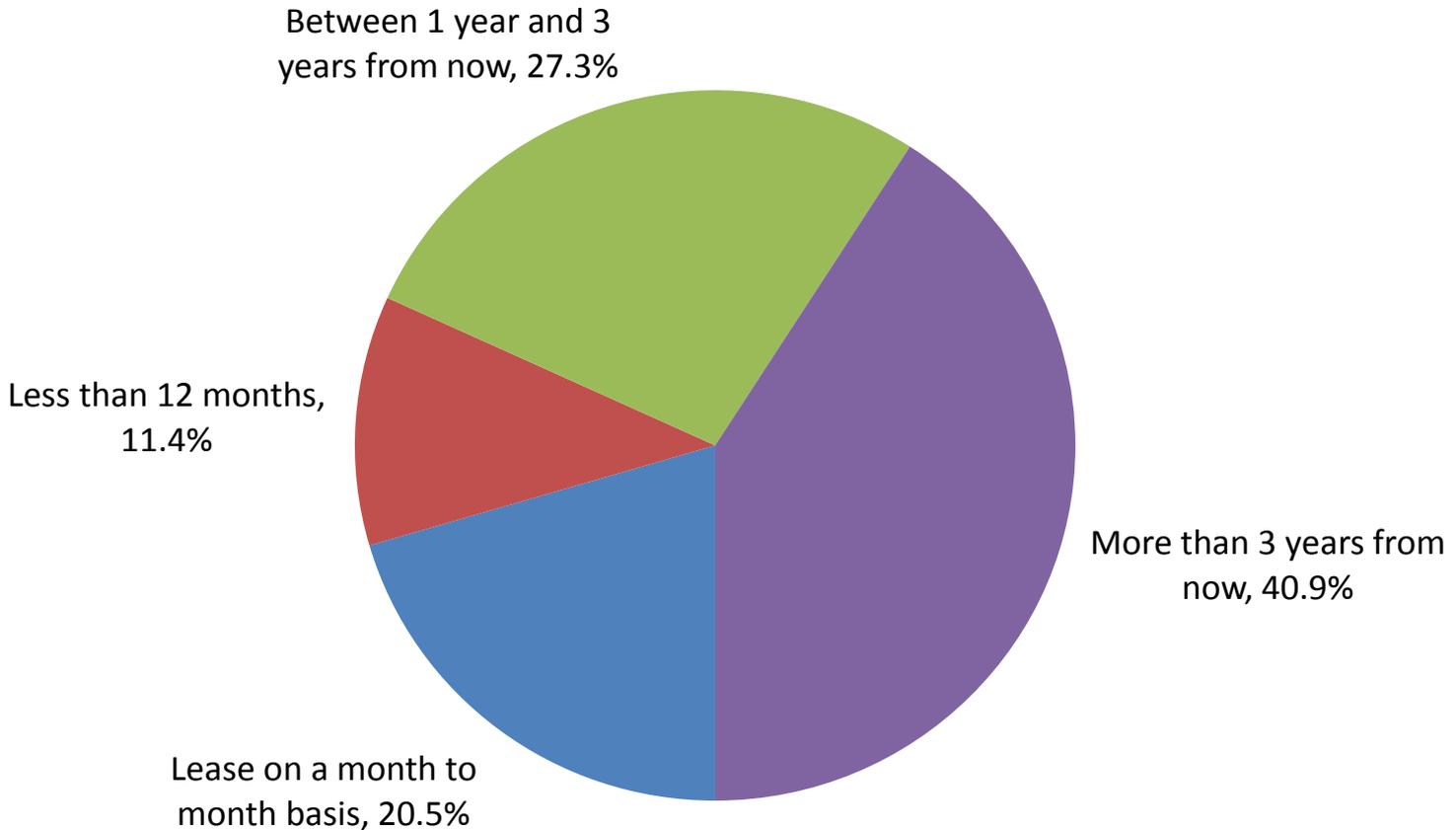
Retail Market Analysis: Survey Findings

In which Hayward district is your business located?



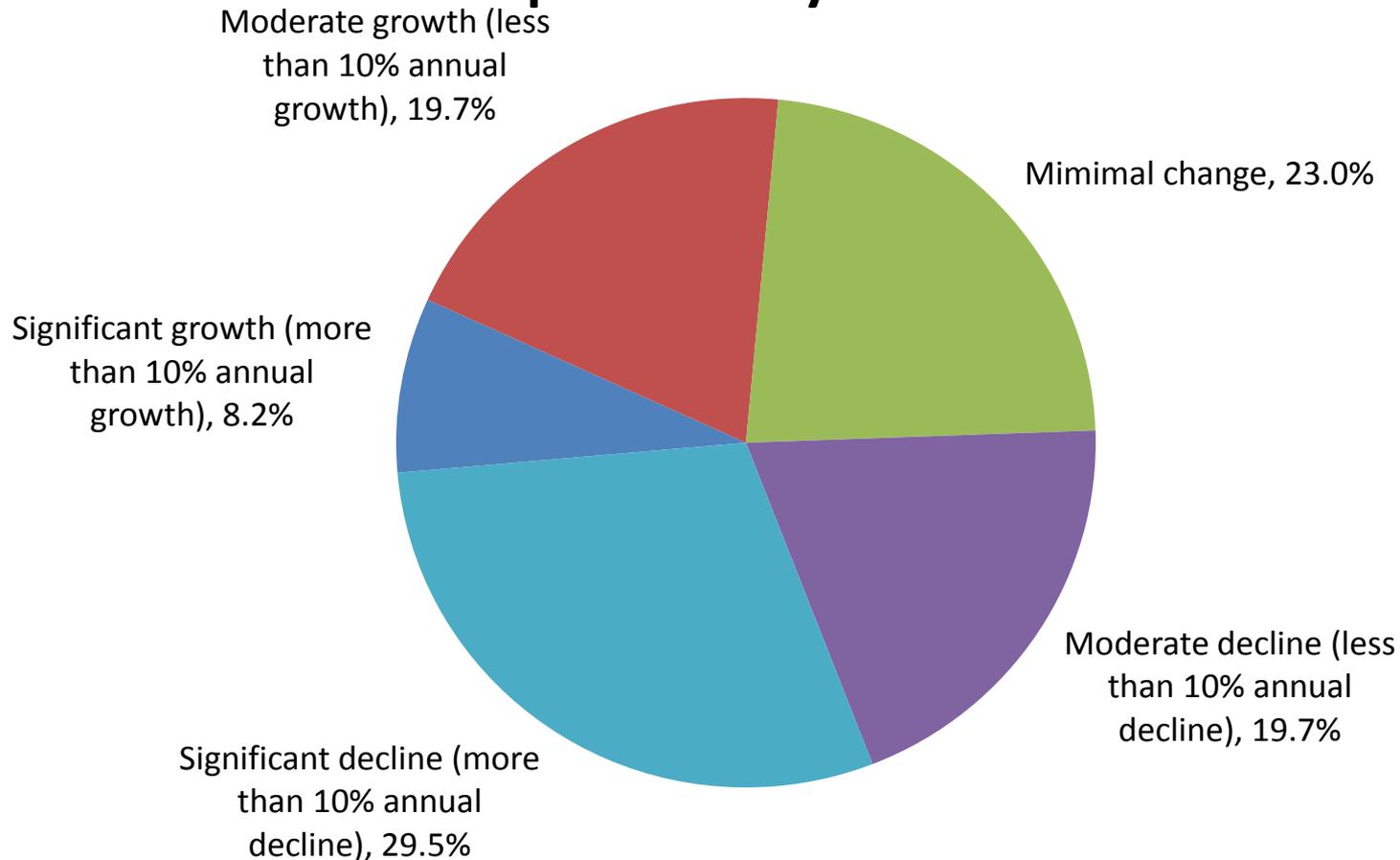
Retail Market Analysis: Survey Findings

If leasing your current space, how much time do you have left on your current lease?



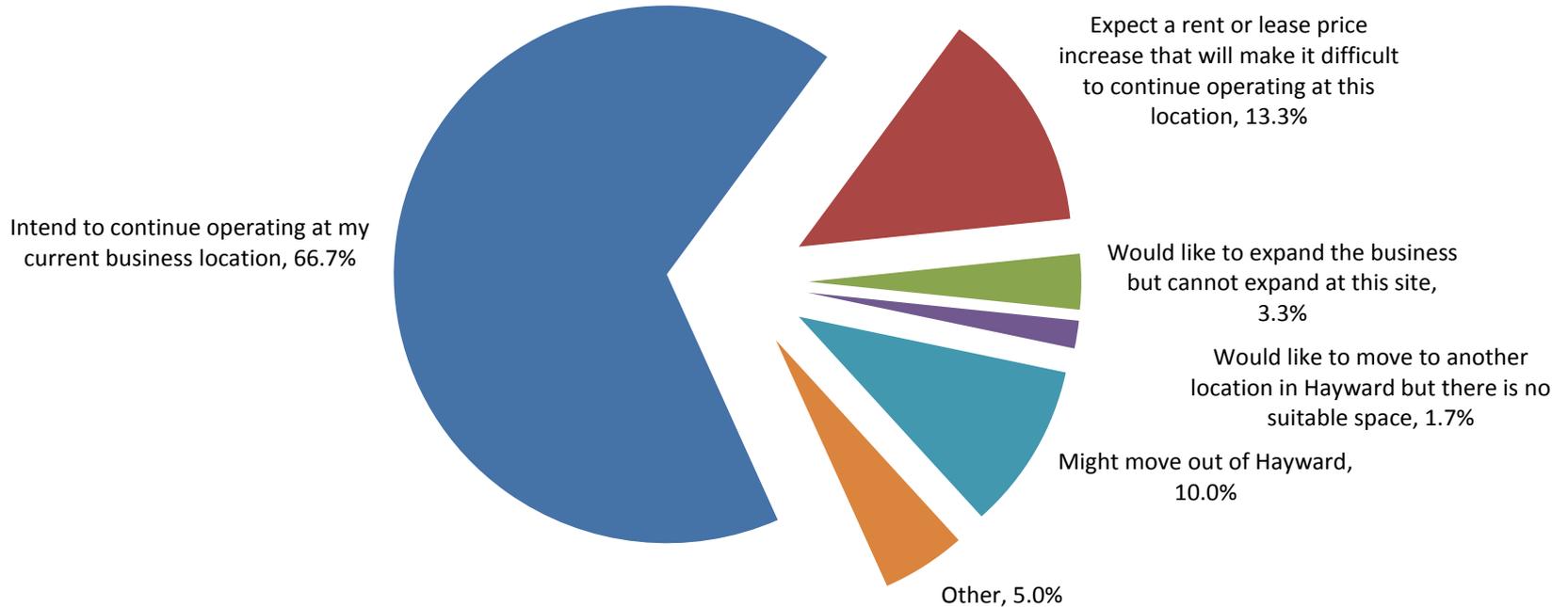
Retail Market Analysis: Survey Findings

How do you generally perceive your sales trends within the past three years?



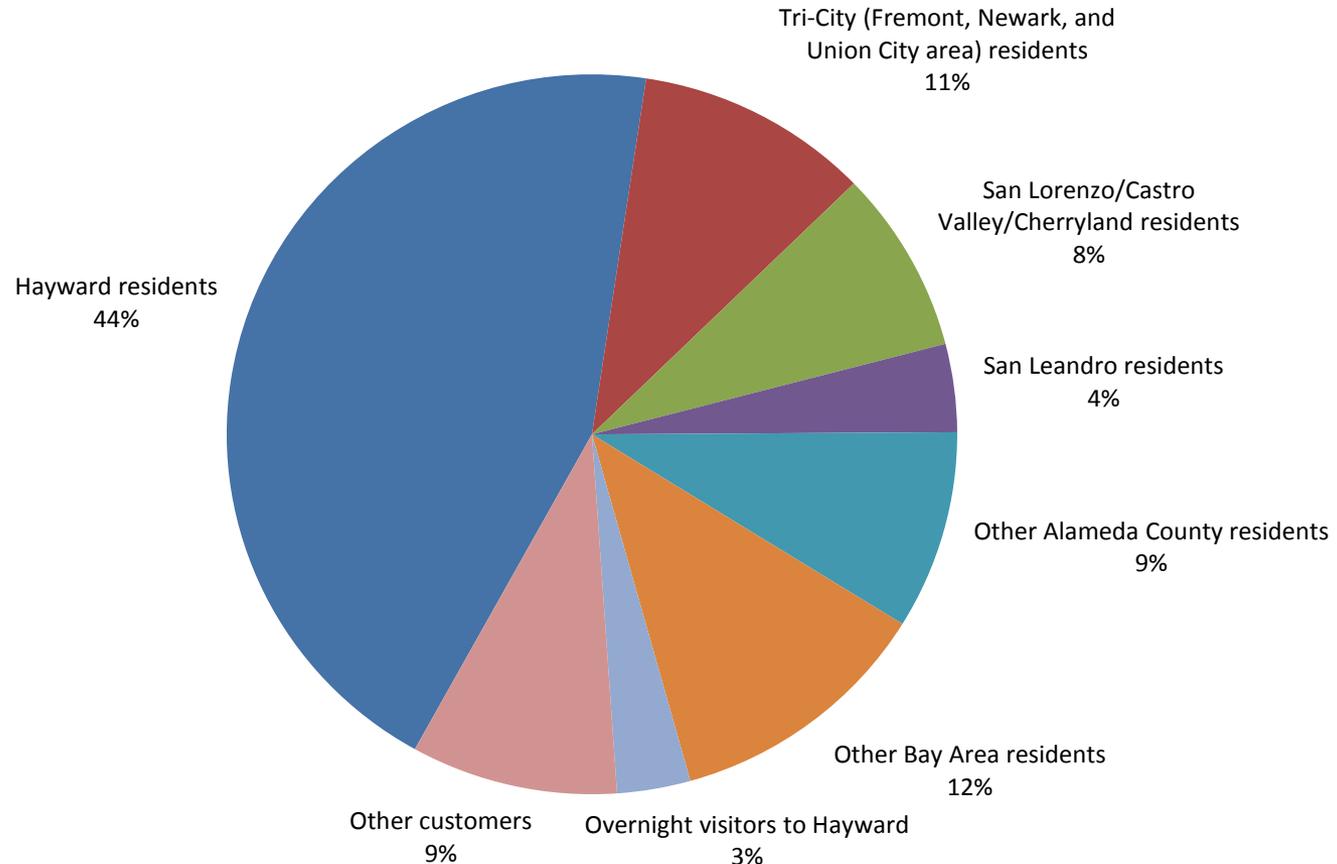
Retail Market Analysis: Survey Findings

What are your business location intentions during the next three years?



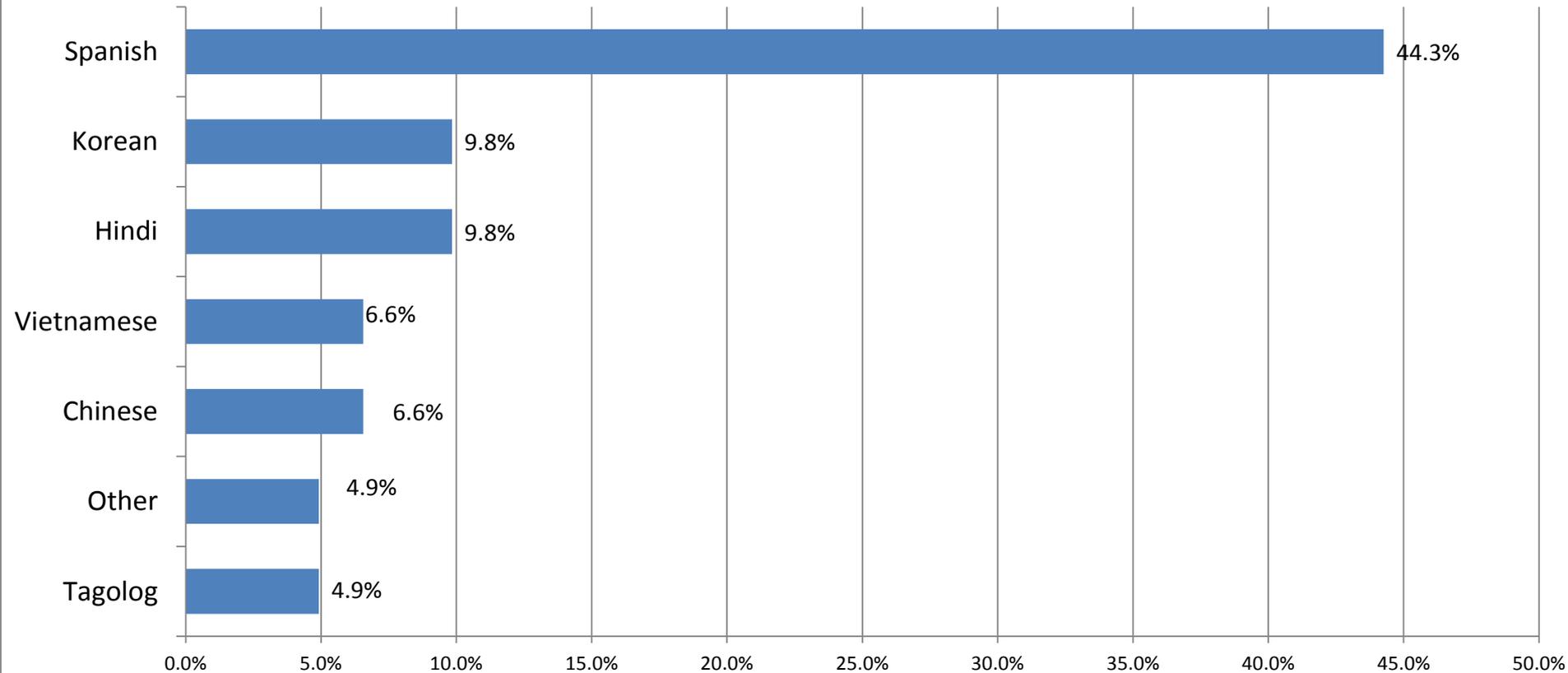
Retail Market Analysis: Survey Findings

Please estimate the percentage of your sales to each group of customers listed below



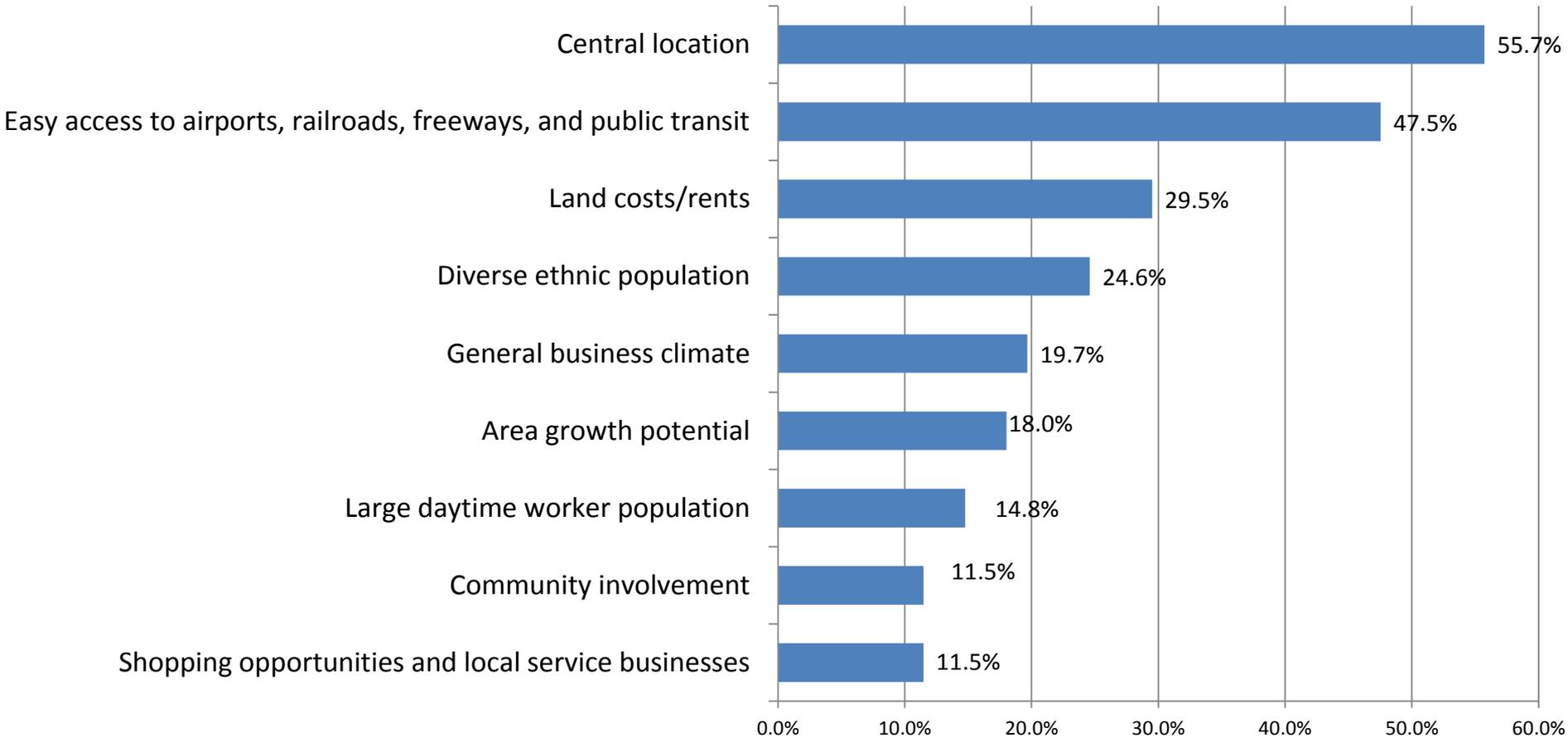
Retail Market Analysis: Survey Findings

Besides English, in what other languages do you conduct business?



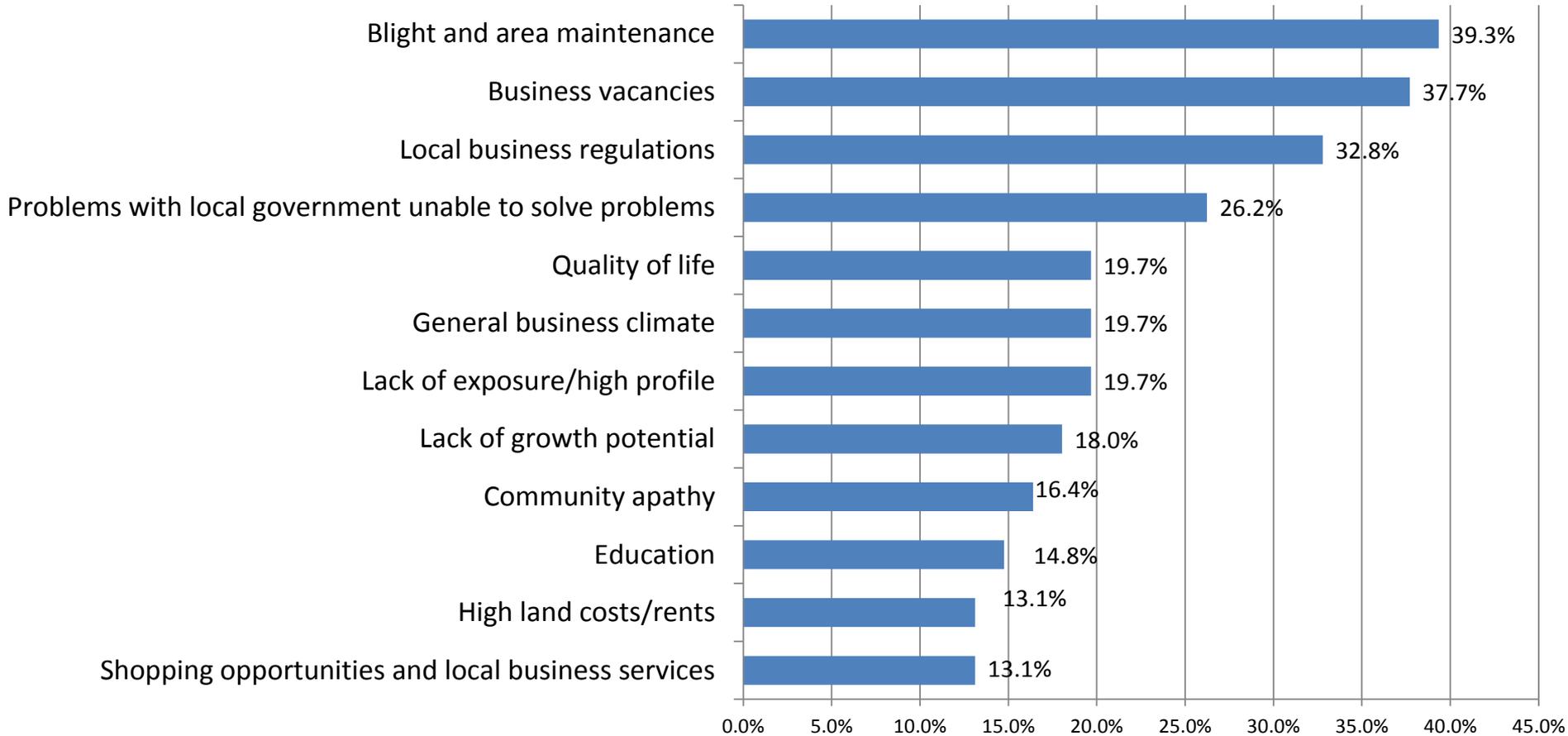
Retail Market Analysis: Survey Findings

Primary Strengths of Hayward as Place to Do Business



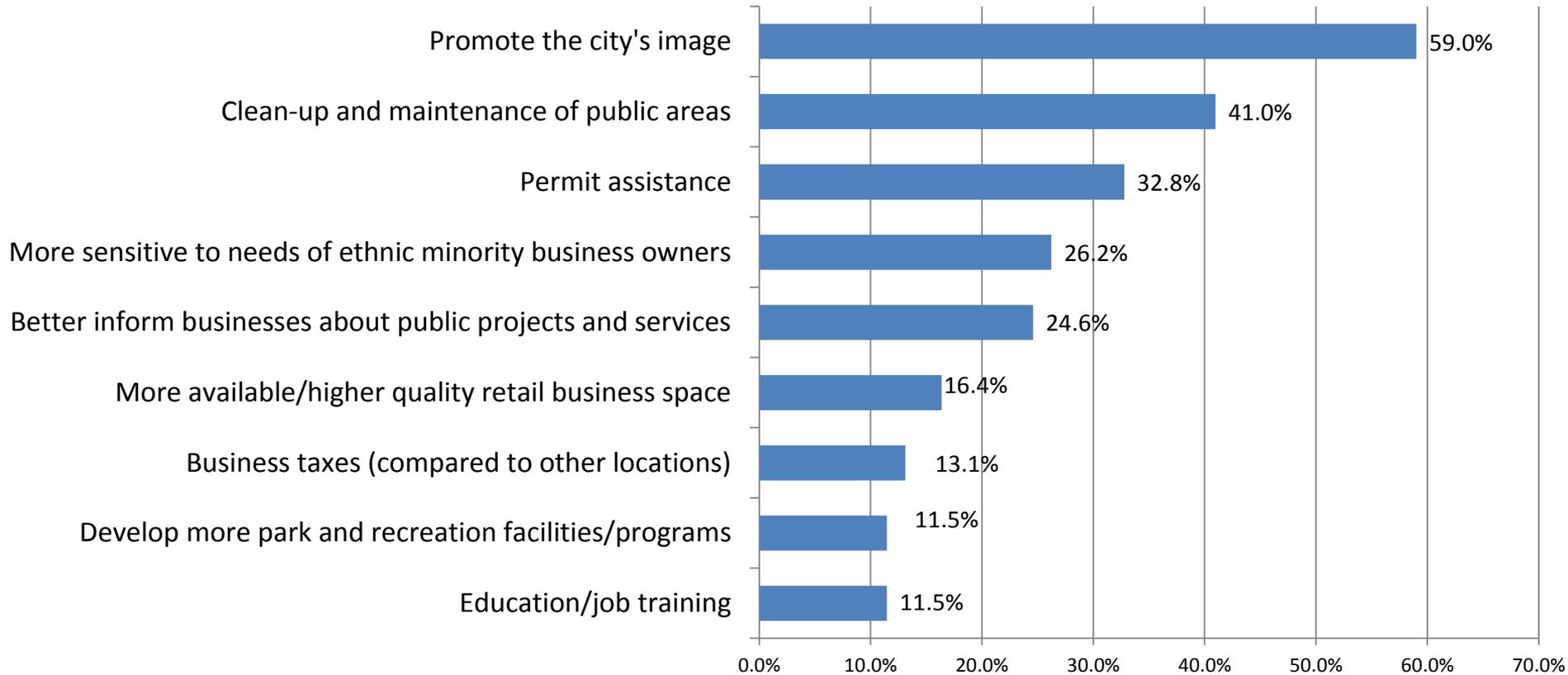
Retail Market Analysis: Survey Findings

Primary Weaknesses of Hayward as Place to Do Business

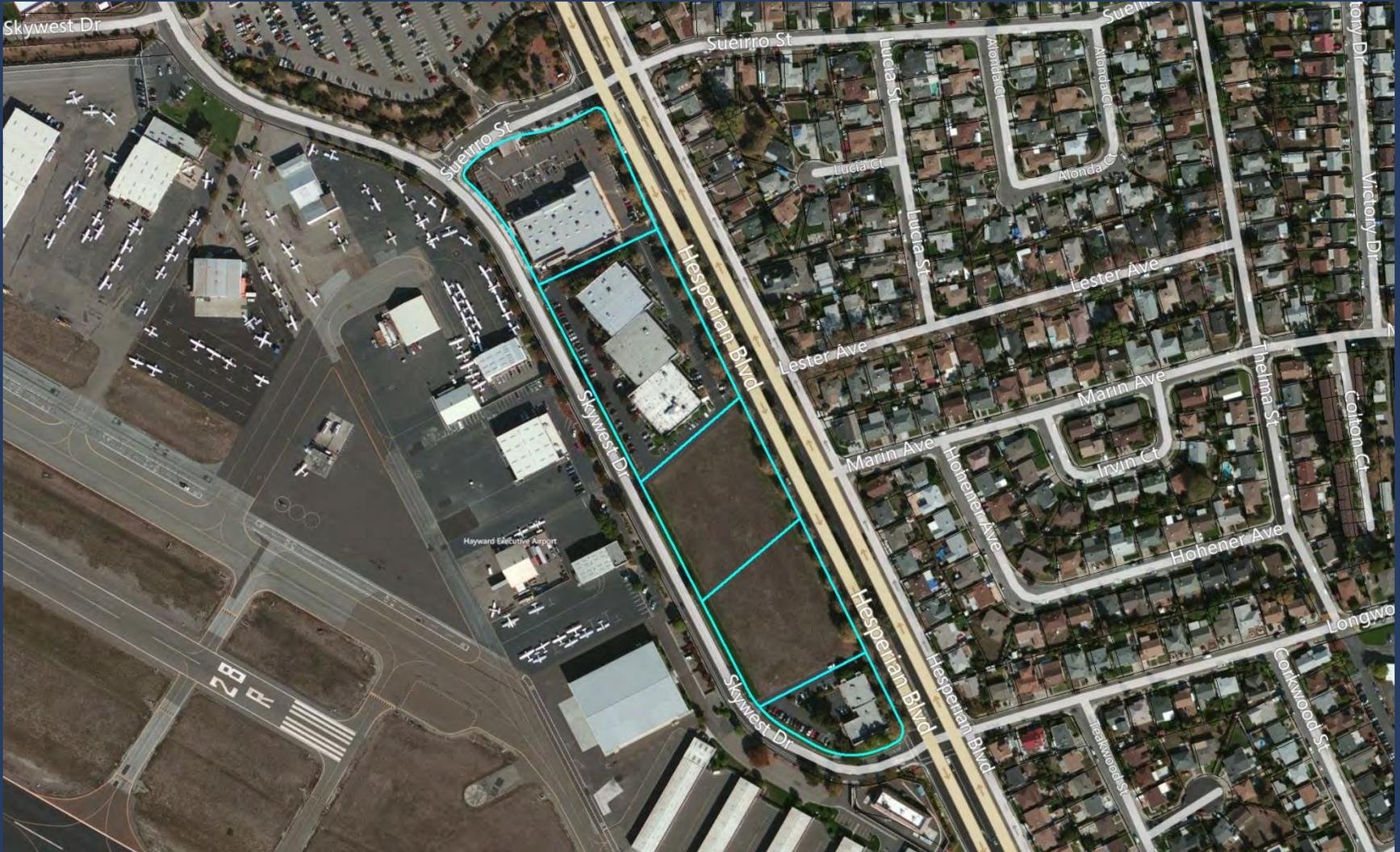


Retail Market Analysis: Survey Findings

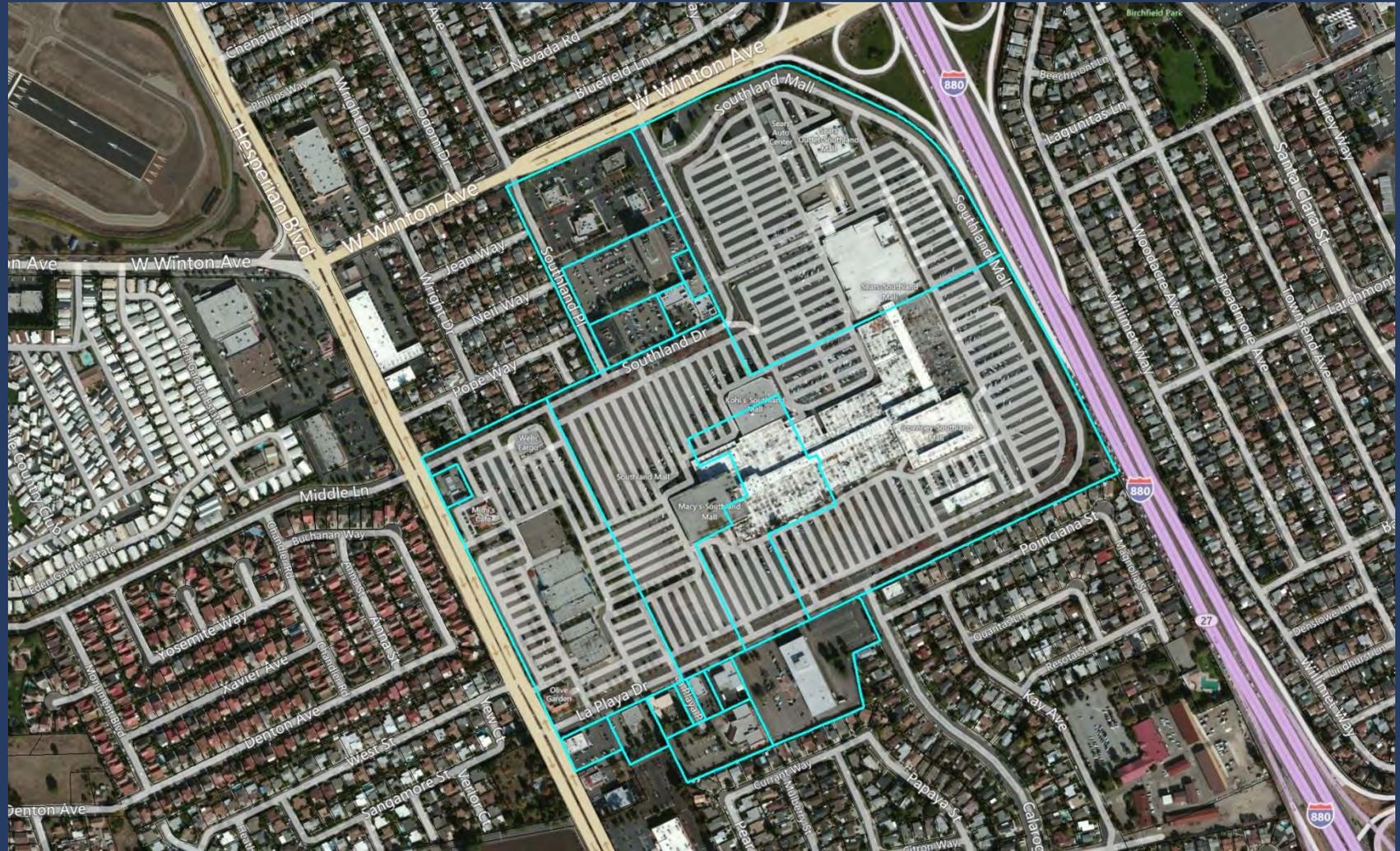
In what areas should Hayward take action to improve the business climate?



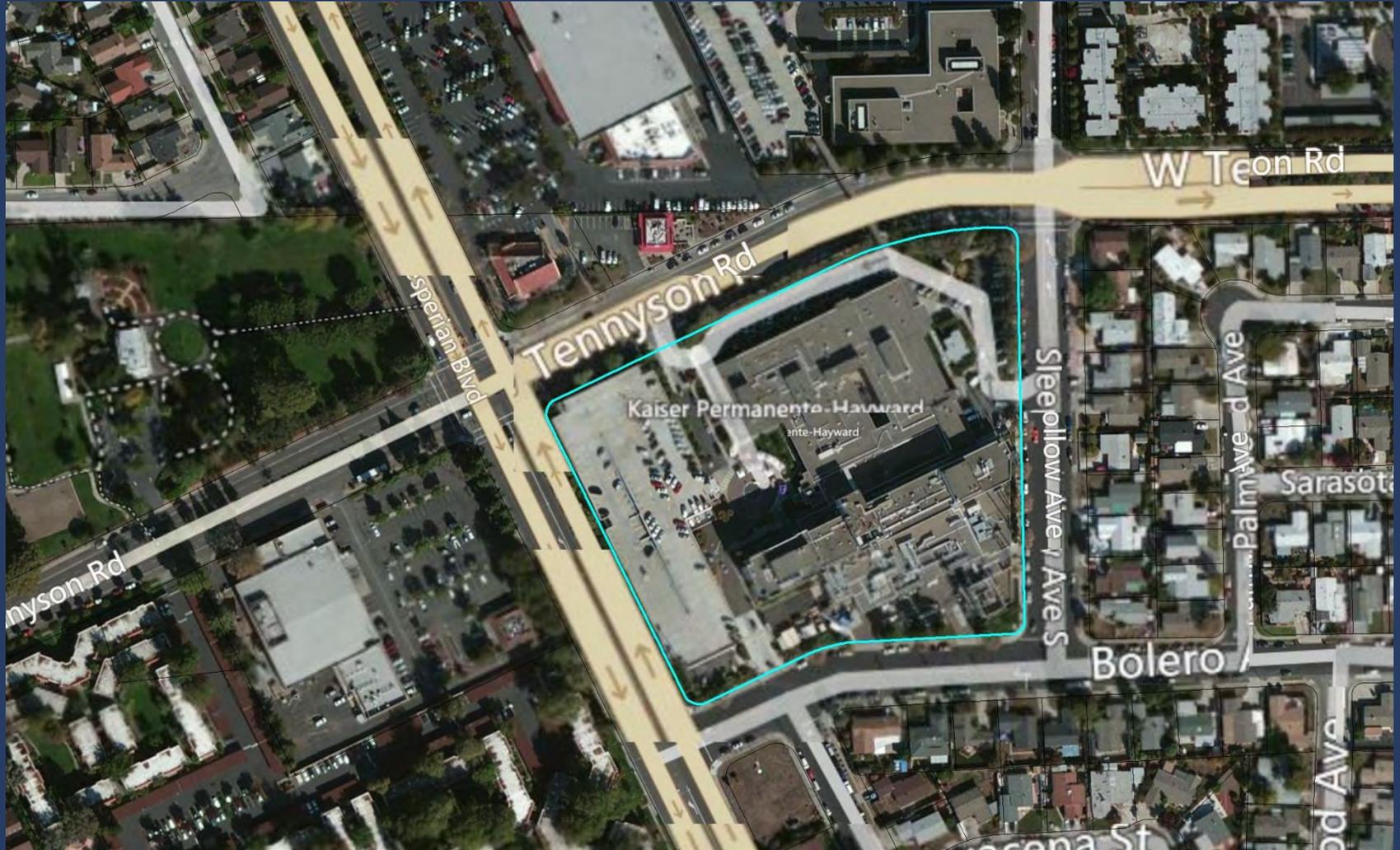
Catalyst Sites: Airport Retail Sites



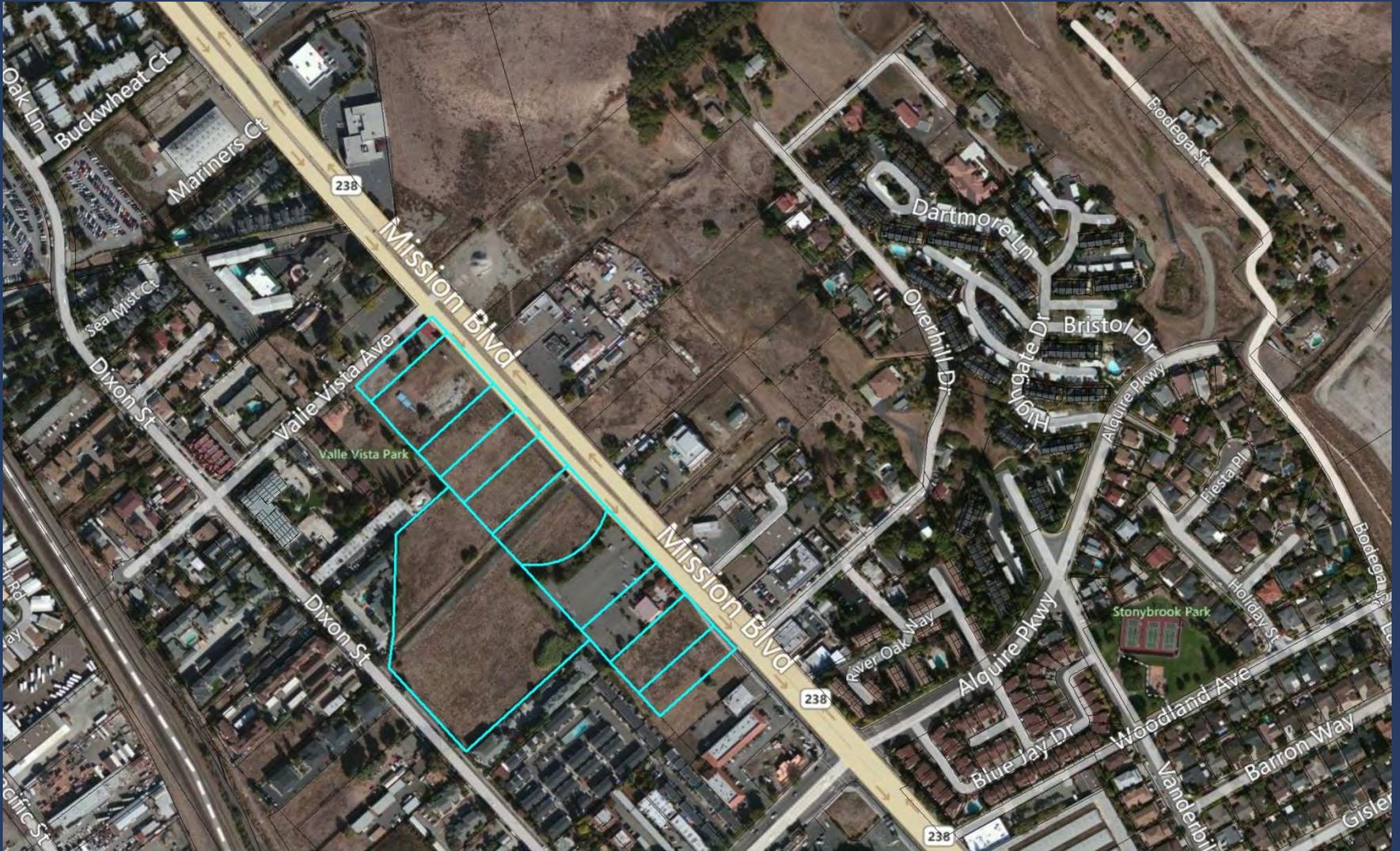
Catalyst Sites: Southland Mall Area



Catalyst Sites: Kaiser Hospital Site



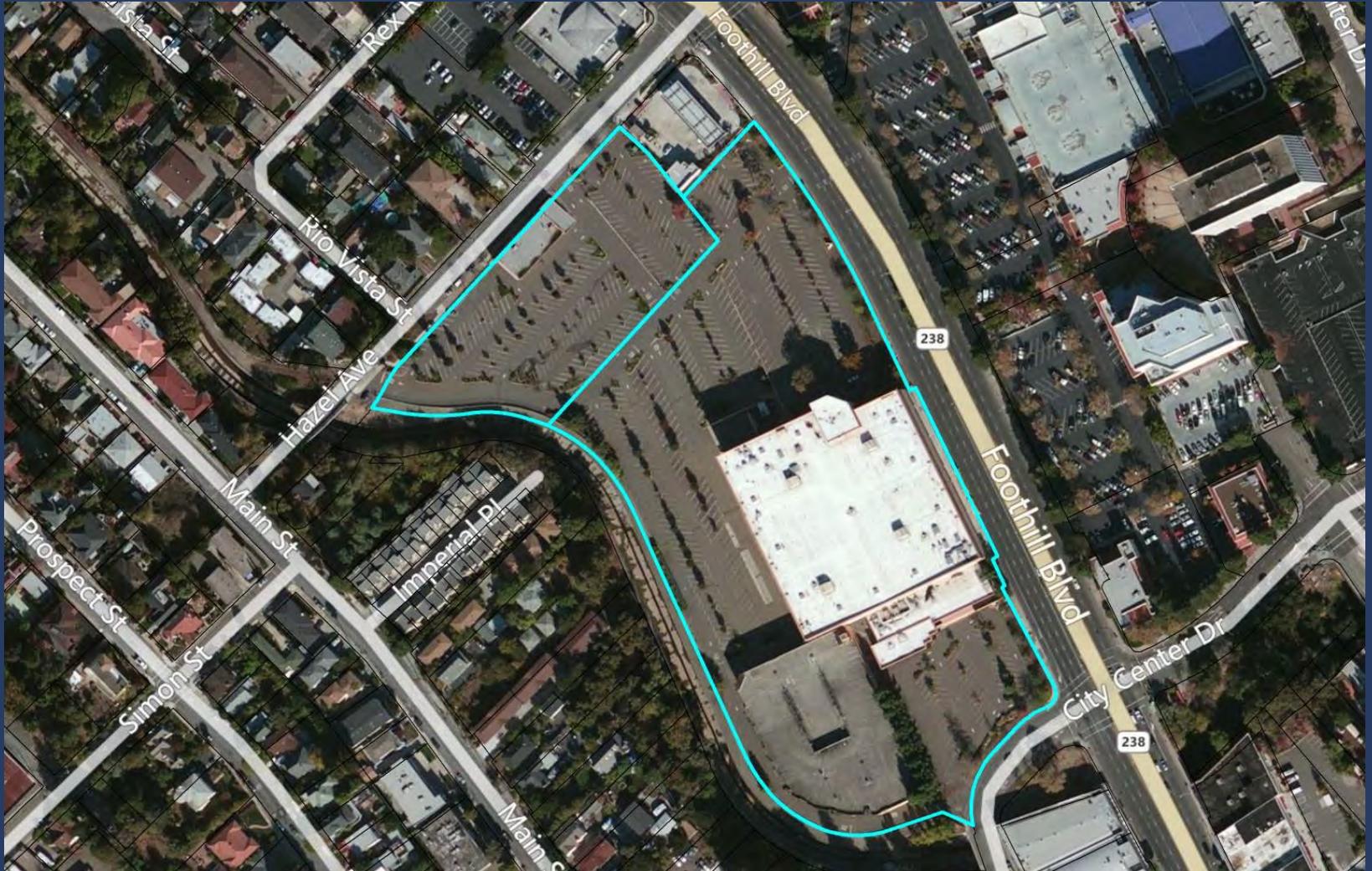
Catalyst Sites: State Highway 238 Site



Catalyst Sites: Holiday Bowl Site



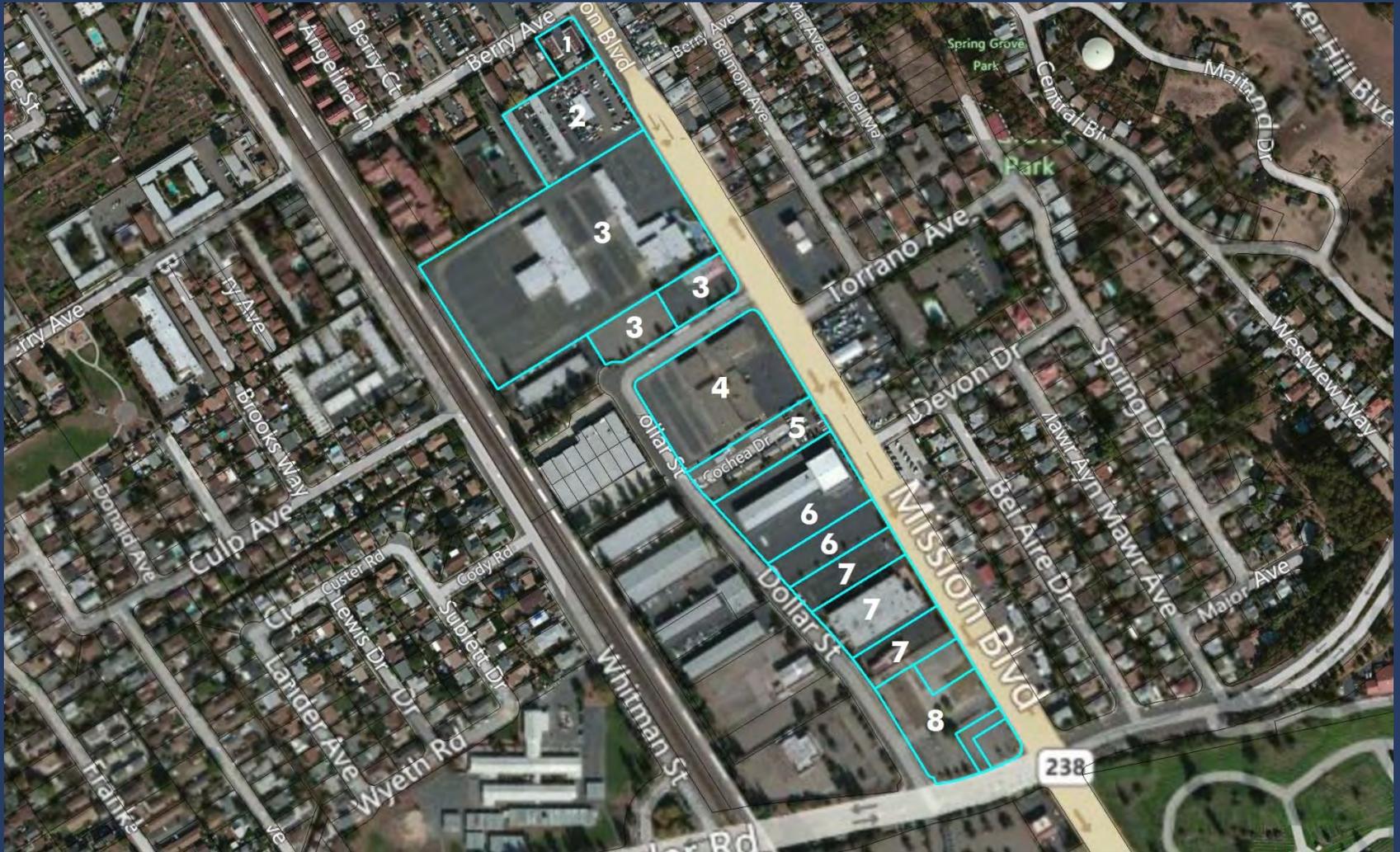
Catalyst Sites: Mervyns Site



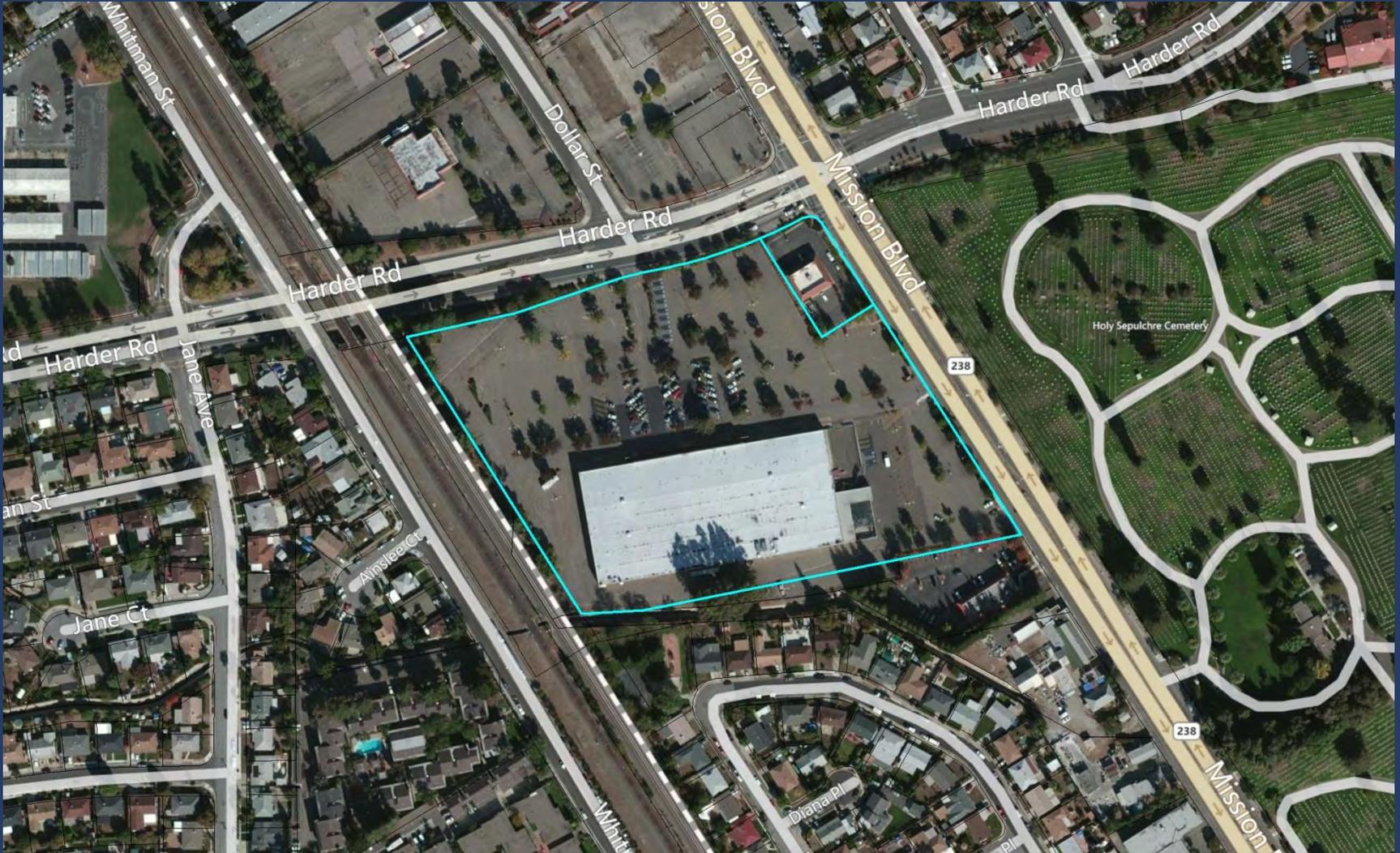
Catalyst Sites: Downtown Sites



Catalyst Sites: Former Auto Row



Catalyst Sites: Kmart Site



Catalyst Sites: Carlos Bee Site

