



City of

LEMOORE

CALIFORNIA

Redevelopment Agency

About Buxton

- National leader in customer analytics
- 500 years of retail management and site selection experience
- 1,900+ clients including 450 community clients
- 20 million sq. feet of retail expansion by our community clients
- Daily interface with senior retail real estate executives

We Speak Retail!

Lemoore's Goals:

- Uncover Specific Retail and Restaurant Opportunities
- Understand the dynamics of the consumers in the trade area
- Link planning and implementation
- Enhance the overall quality of life in Lemoore

Executive Summary

Three anchor points were chosen to reflect the overall trade area

- Hwy 41 & Bush St
- Hwy 198 & 19th Ave
- 18th Ave & Hanford Armona Rd

Based on the similarities in each of the three areas and proximity to each other, the city center was selected for complete analysis and retail matching.



CommunityID[®]

Lemoore's Steps in the Retail Strategy

Step 1. Defining Trade Area

Step 2. Identifying and Profiling Customers

Step 3. Understanding Retail Potential – Supply/Demand

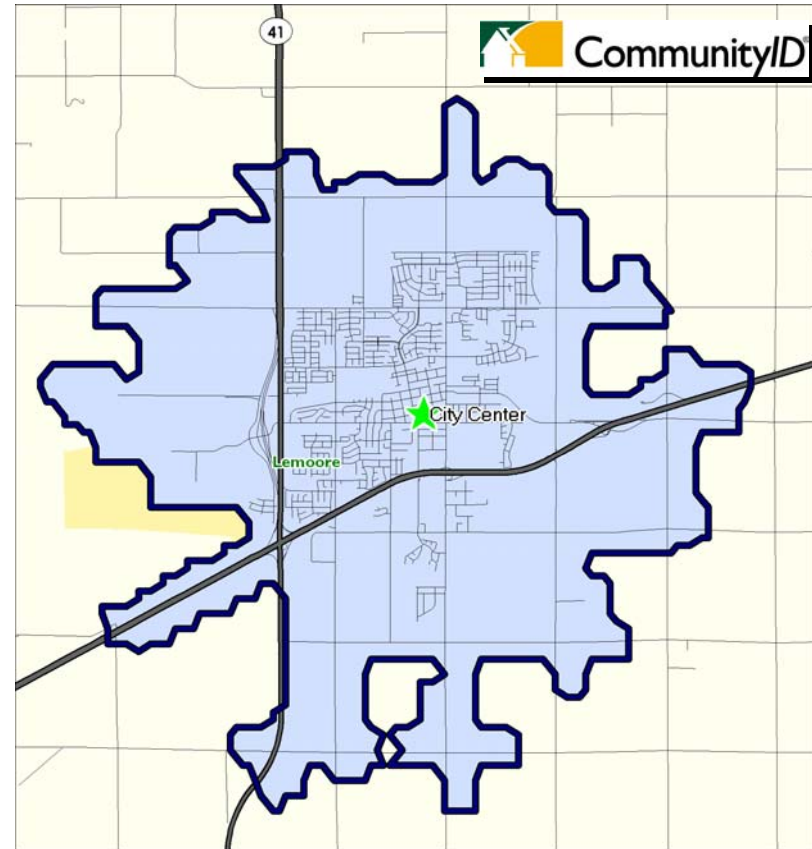
Step 4. Matching Customers to Retailers

Step 5. Customized Marketing Packages

Step 1. Defining Lemoore's Trade Area

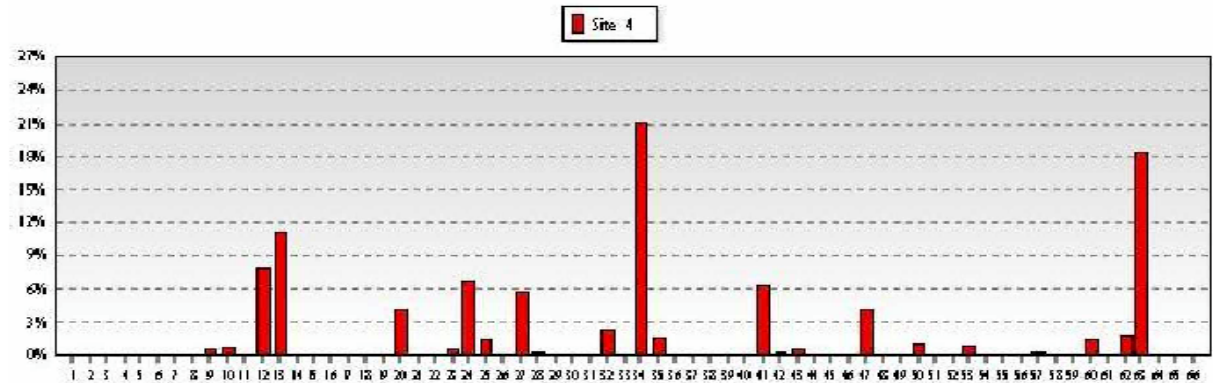
Factors considered when determining the primary trade area of five minutes

- Density of the customers in the area
- Best snapshot of the customers
- Closest to proposed retail area
- Existing retail in surrounding areas



Step 2. Primary Trade Area Customers

Trade Area Segmentation



Dominant Segments –
These are the groups that
make up at least 3% of the
trade area

Dominant Segments	Description	Households	% of All Households
12	BRITE LITES, LI'L CITY	631	7.77%
13	UPWARD BOUND	913	11.24%
20	FAST-TRACK FAMILIES	342	4.21%
24	UP-AND-COMERS	554	6.82%
27	MIDDLEBURG MANAGERS	461	5.68%
34	WHITE PICKET FENCES	1,712	21.08%
41	SUNSET CITY BLUES	518	6.38%
47	CITY STARTUPS	335	4.13%
63	FAMILY THRIFTS	1,484	18.28%

Step 3. Understanding Retail Potential

Primary Trade Area

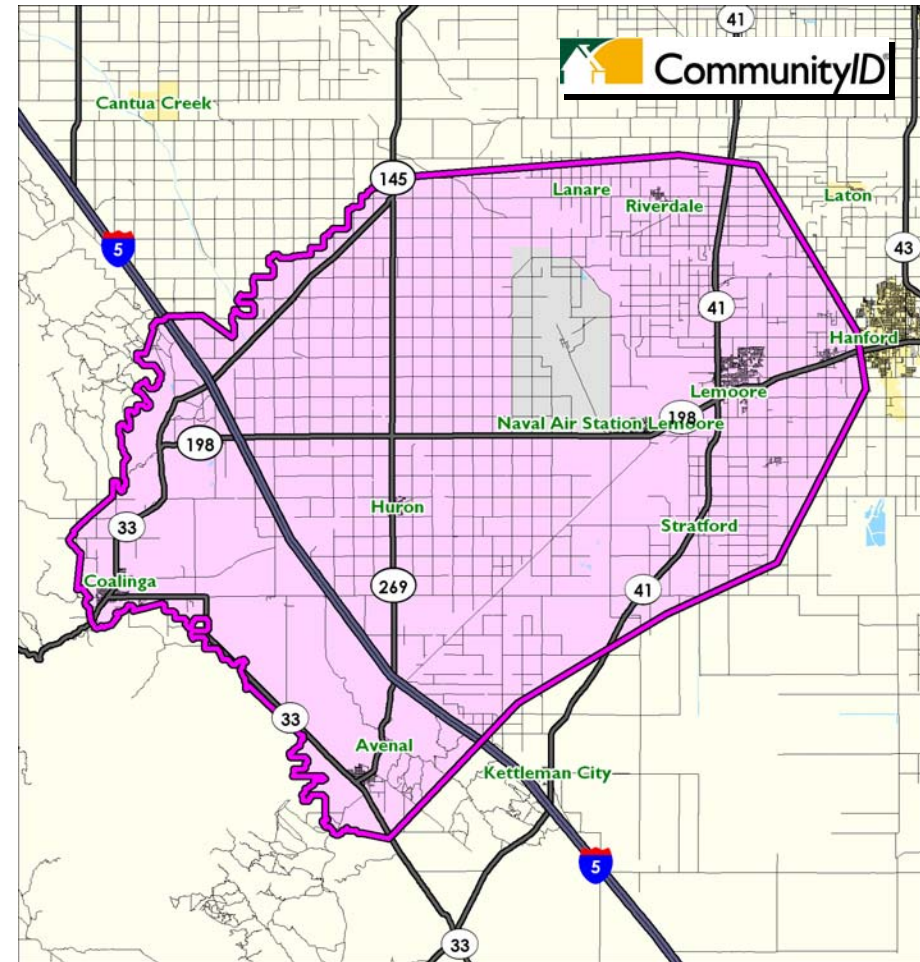
- How many dollars are leaving
- What stores attract outside dollars
- What are our retail opportunities
- What are the opportunities for local retailers



Secondary Trade Area

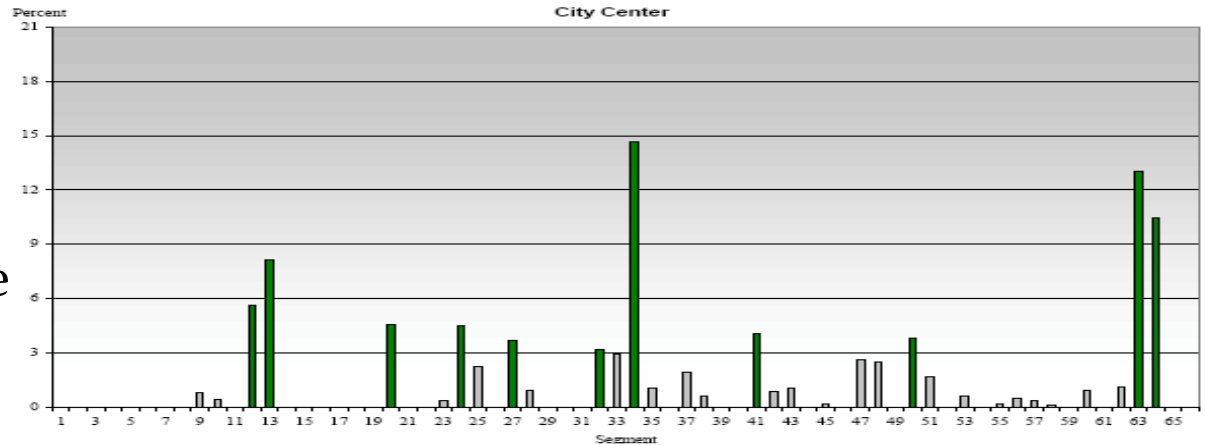
Factors considered when determining the secondary trade area (forty five-minutes)

- Density of the customers in the area
- Best snapshot of the customers
- Closest to proposed retail area
- Existing retail in surrounding areas



Secondary Trade Area Customers

Dominant Segments –
These are the groups that
make up at least 3% of the
trade area



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%

Secondary Trade Area Retail Potential

- How many dollars are leaving
- What stores attract outside dollars
- How strong is our retail sector
- What are our retail opportunities
- What are the opportunities for local retailers



Lemoore Major Store Type.
Buxton analysis details:

- 74 Store Types
- 36 Product Types

Identifying and Profiling Lemoore's Customers

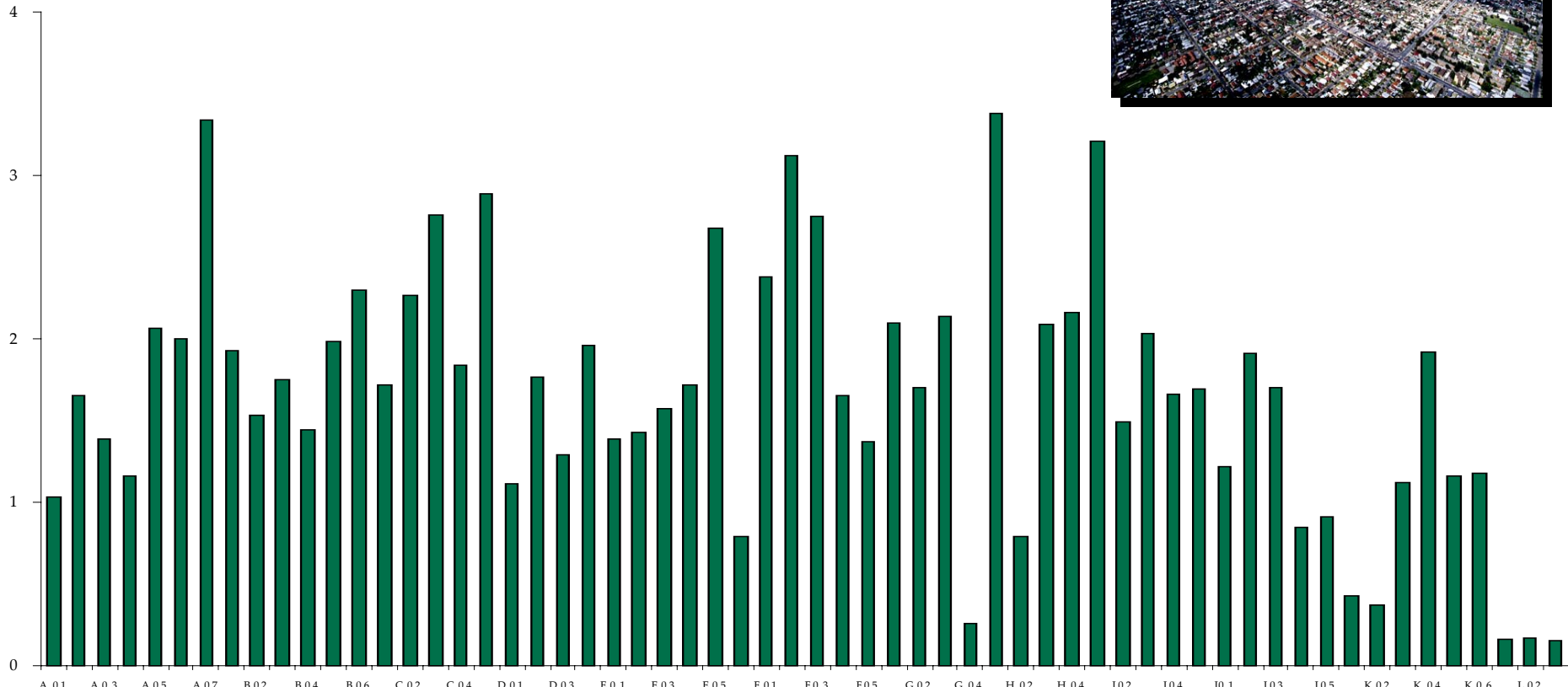


Customers are identified based on psychographic characteristics which include:

- Lifestyles
- Purchase Behavior
- Media Habits

Segmentation

- All U.S. households are grouped into types based on demographics *and psychographics*



Success is insight.

Lifestyles

Psychographics focus on
Customer Lifestyles



Segment 12 Brite Lites, Li'l City
Middle-aged couples with no children
College-educated professionals
Live in city away from metropolitan hub
Own homes with new technology



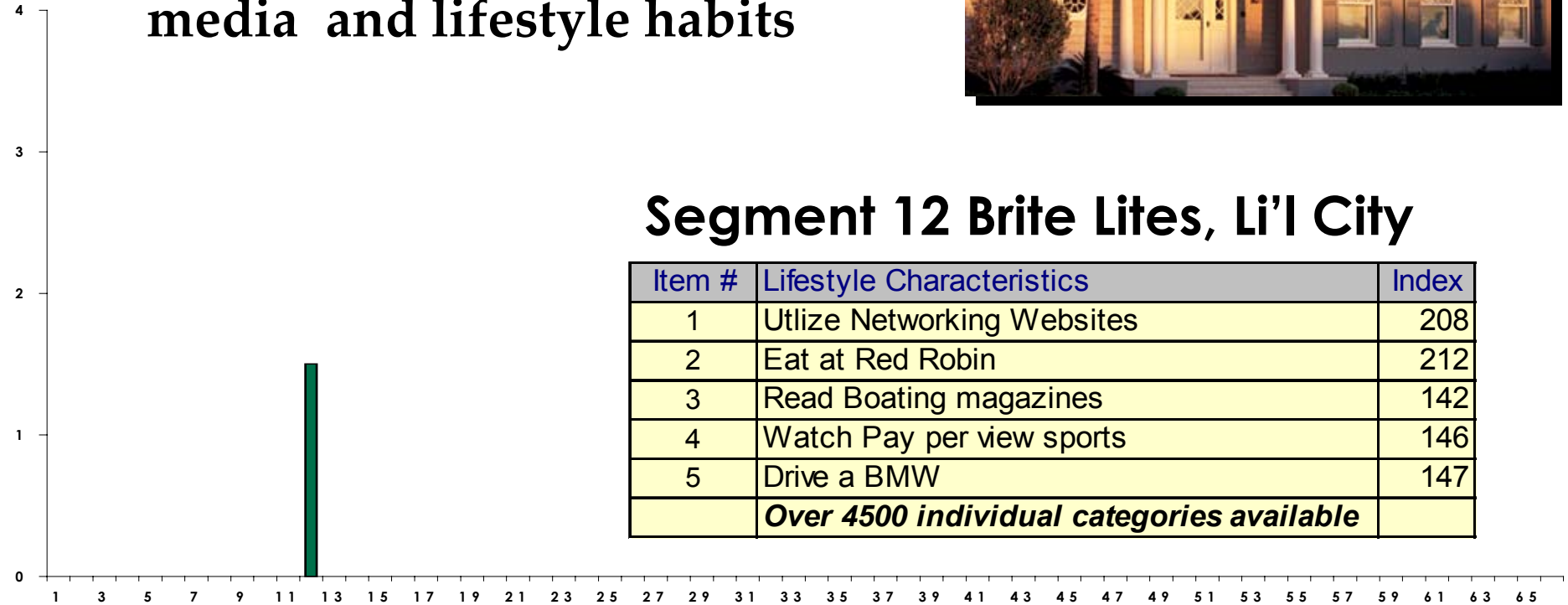
Lifestyles

Psychographics focus on consumer's spending, media and lifestyle habits



Segment 12 Brite Lites, Li'l City

Item #	Lifestyle Characteristics	Index
1	Utilize Networking Websites	208
2	Eat at Red Robin	212
3	Read Boating magazines	142
4	Watch Pay per view sports	146
5	Drive a BMW	147
	Over 4500 individual categories available	



Lifestyles



Segment 13 Upward Bound

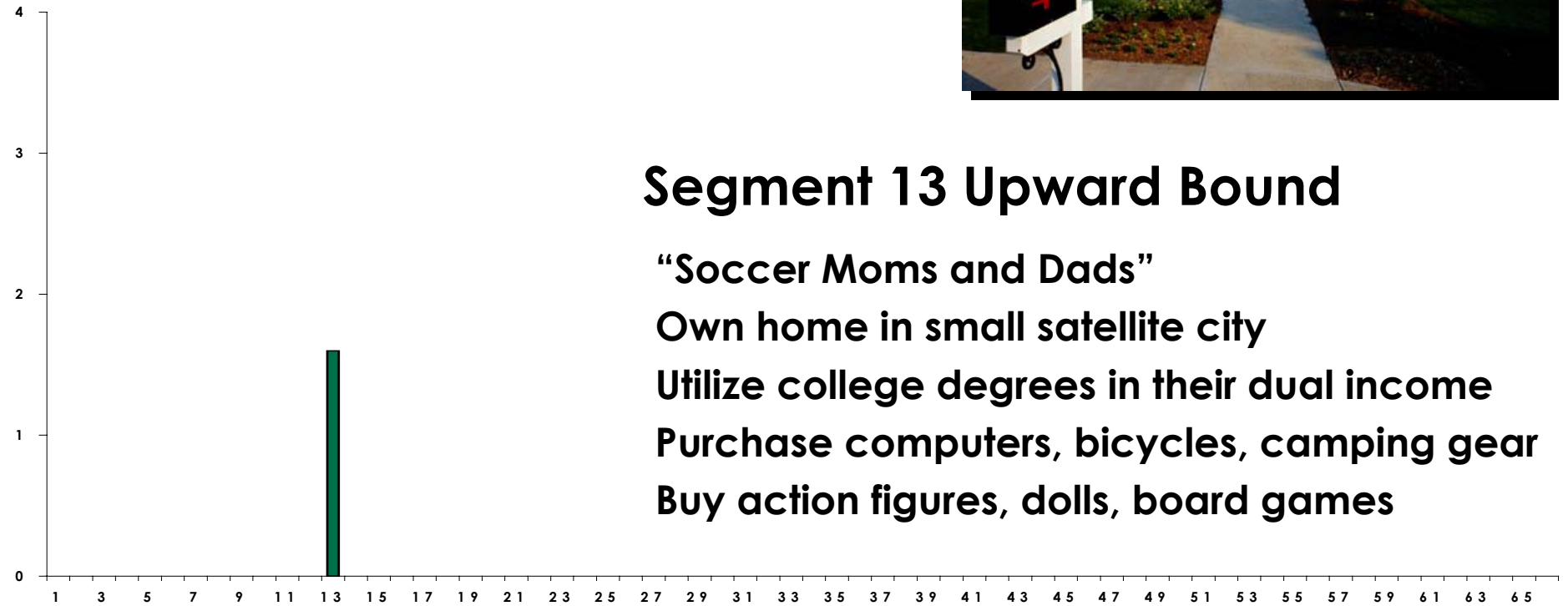
“Soccer Moms and Dads”

Own home in small satellite city

Utilize college degrees in their dual income

Purchase computers, bicycles, camping gear

Buy action figures, dolls, board games



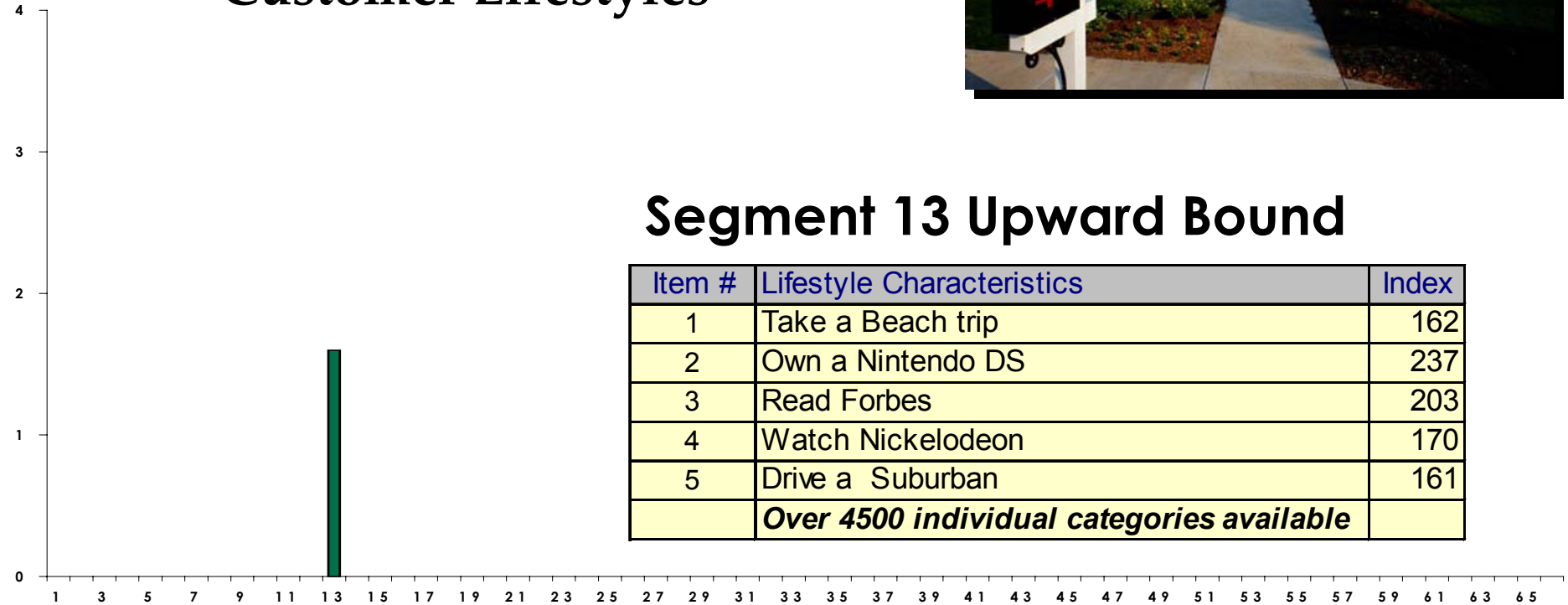
Lifestyles

Psychographics focus on
Customer Lifestyles



Segment 13 Upward Bound

Item #	Lifestyle Characteristics	Index
1	Take a Beach trip	162
2	Own a Nintendo DS	237
3	Read Forbes	203
4	Watch Nickelodeon	170
5	Drive a Suburban	161
	Over 4500 individual categories available	



Success is insight.

Lifestyles

Psychographics focus on
Customer Lifestyles



Segment 34 White Picket Fences

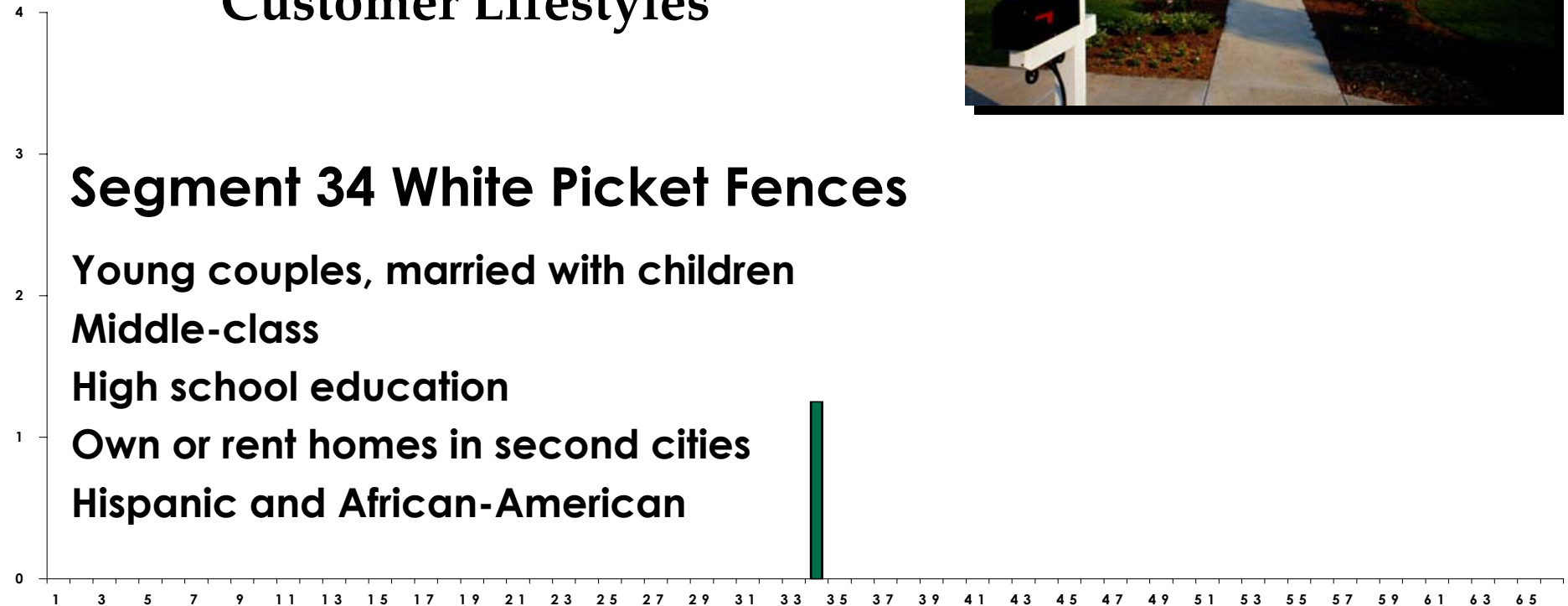
Young couples, married with children

Middle-class

High school education

Own or rent homes in second cities

Hispanic and African-American



Success is insight.

Lifestyles

Psychographics focus on
Customer Lifestyles



Segment 34 White Picket Fences

Item #	Lifestyle Characteristics	Index
1	Eat at fast food picked by kids	167
2	Do home remodeling projects	154
3	Read Baby magazines	197
4	Watch ESPN Classic	146
5	Drive a Ford Excursion	138
	<i>Over 4500 individual categories available</i>	

Lifestyles

Psychographics focus on
Customer Lifestyles



Segment 63 Family Thrifts

Young parents with many children

Work entry-level service jobs

Live in second city

Ethnically diverse

Buy tricycles, basketball hoops,, Hyundais



Lifestyles

Psychographics focus on
Customer Lifestyles



Segment 63 Family Thrifts

Item #	Lifestyle Characteristics	Index
1	Buy children's toys	122
2	Buy contemporary Christian music	90
3	Read Parenting	51
4	Watch soap operas	90
5	Drive a Kia	47
	Over 4500 individual categories available	



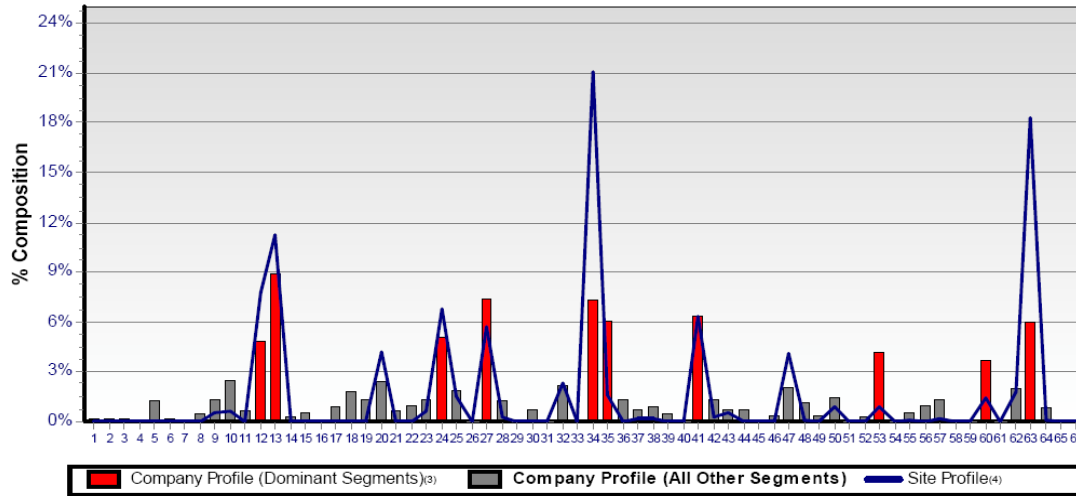
Step 4. Matching Customers to Retailers

The community's profile was matched to the profiles of over 4,500 retailers and restaurants...

Retailer	Retailer Classification	US Locations
AMF Bowling	Amusement/Play Centers, Bowling Centers	313
Big 5 Sporting Goods	Sporting Goods/Athletic Wear	369
Chuck E Cheese Pizza	Amusement/Play Centers	537
Famous Dave's	Restaurants/Bars	172
Famous Footwear	Shoes	1,138
Golden Corral Steakhouse	Restaurants/Bars	484
Gold's Gym	Health Clubs/Gyms	575
Jo-Ann Fabrics & Crafts	Fabrics, Art Supplies/Crafts/Hobbies	768
Kohl's	Department Stores	1,004
Logan's Roadhouse	Restaurants/Bars	196
Office Max	Computers/Software, Electronics, Office Supplies/Furniture	1,000
Outback Steakhouse	Restaurants/Bars	976
Putt Putt Golf Course	Amusement/Play Centers	65
Red Lobster	Restaurants/Bars	680
Red Robin Gourmet Burgers	Restaurants/Bars	135
Sam's Club	Warehouses/Wholesale Clubs	691
Sherwin-Williams	Wall Coverings/Paint	3,346
Stein Mart	Department Stores	280
T J Maxx	Children's Apparel, Men's Apparel, Women's Apparel, Bed and Bath Linens, Home Décor/Lamps/Drapes	875
Tuesday Morning	Close-Out Stores	860

Positive Retail Matches

Segmentation Profile⁽¹⁾ (5 Minute Drive Time)⁽²⁾



Two components make a successful retail match:

1. Segmentation Profile Match – Strong Visual Match

Trade Area Comparison (5 Minute Drive Time)

- Comparable Trade Area Comparison Match

	FAMOUS DAVE'S Average Trade Area ⁽⁵⁾	Lemoore, CA Site Trade Area
Total Population	22,687	25,402
Total Households	8,624	8,120
Company Dominant Segment Households	5,156	6,595

Step 5. Custom Marketing Packages



Recommended Retailer Profiles

Red Robin Gourmet Burgers

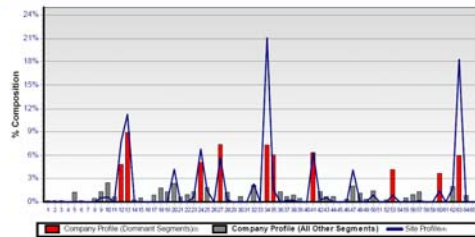
Red Robin Gourmet Burgers considers locations in enclosed regional and super regional malls, power centers, pad sites/outparcels, lifestyle centers, and freestanding locations. Fashion-oriented, entertainment, upscale, and grocery/supermarket co-tenants are preferred. Their customer base is made up of mid to high income adults, children, and teens. They currently operate in California and have plans for expansion throughout the United States.

Contact Information:
Regional Vice President of Real Estate - West
Tim O'Kane
 2815 Eastlake Avenue E, Suite 170
 Seattle, WA 98102
 Phone: (206) 215-4560
 Fax: (206) 215-4577
 E-mail: tokane@redrobin.com
 www.redrobin.com

Profile Match Report

Company: FAROUS DAVE'S	Site: City Center
Report Date: 4/7/2009	Lemoore, CA

Segmentation Profile⁽¹⁾ (5 Minute Drive Time)⁽²⁾



Trade Area Comparison (5 Minute Drive Time)

	FAROUS DAVE'S Average Trade Area ⁽¹⁾	Lemoore, CA Site Trade Area
Total Population	22,887	25,402
Total Households	8,624	8,120
Company Dominant Segment Households	5,156	6,595

(1) Segmentation Profile: Every U.S. household is classed into one of 66 distinct segments described by that household's lifestyle and spending habits.
 (2) Drive Time: Drive time is used to define the trade area.
 (3) Dominant Segments: Any segment that makes up at least 3 percent of a company's segmented profile (RED BARS).
 (4) Site Profile: Those segments within the site's drive time trade area (BLUE LINE).
 (5) Average Trade Area: FAROUS DAVE'S trade areas used in this comparison are defined by population and market type in Lemoore, CA.

Retail Site

5-Minute Trade Area Segmentation

Each household in the U.S. can be described by one of sixty-six segments, based upon its consumer habits and spending patterns. This graph depicts the segments, by percent of total households that comprise the trade area for the proposed site. A segment that represents at least three percent of a trade area is considered a dominant segment.

The chart at the bottom of this page provides household counts and indicates the percent of all households in the trade area that are classified in each dominant segment. The next page provides a brief description of dominant segments. The methodology section of this report includes a full description of each segment.

Trade Area Segmentation

Dominant Segment	Description	Household	% of All Household
12	WHITE LABEL LIQ. CITY	451	7.72%
13	REVERED BAKERY	582	11.24%
26	IND. TRADE EMPLOYEES	362	4.21%
24	SR-440-CHEVSE	354	4.22%
37	MIDDLE-CLASS MANAGER	461	5.68%
34	WHITE-NECKED-BLUES	1,712	21.05%
41	SKINNY CITY BAKER	519	6.28%
47	CITY STRAIGHTS	335	4.13%
43	BAKERY BAKERY	1,424	17.53%

Contact Information

Profile Match Reports

Site Description

Marketing Packages can also be created for developers, brokers, and franchisees.

Executing Your CommunityID[®] Strategy

Marketing is not an option – it's *mandatory*

Market your retail advantages:

- Retail potential (leakage/surplus report)
- Retailer's customers in your trade area (retail match report)
- Your site compared to other locations (retail match report)
- Available sites and buildings

Executing Your CommunityID[®] Strategy

Aggressively market to:

- Targeted retailers
- Retail developers
- Commercial real estate firms
- International Council of Shopping Centers
(Las Vegas and regional events)

Executing Your CommunityID[®] Strategy

- Creating a retail friendly climate
- Assembling and preparing sites
- Providing off-site infrastructure
- Streamlining permitting and zoning
- Providing targeted incentives
- Offering opportunities for local retailers

Executing Your CommunityID® Strategy

Using Buxton to stay current

- Client E-newsletter
- SCOUT-online interface with Buxton
- Webcasts
- ICSC support
- Client Services
- Additional retailer matches and refreshes

Buxton®

IDentifying Customers®

Success is insight.