

The Economics of Land Use



Final Report

Loomis Town Center Implementation Plan—Phase 1

Prepared for:

Town of Loomis

Prepared by:

Economic & Planning Systems, Inc.

February 3, 2010

*Economic & Planning Systems, Inc.
2150 River Plaza Drive, Suite 400
Sacramento, CA 95833-3883
916 649 8010 tel
916 649 2070 fax*

*Berkeley
Sacramento
Denver*

www.epsys.com

EPS #18617

Table of Contents

1.	INTRODUCTION AND SUMMARY	1
	Findings.....	1
	Recommended Actions	3
2.	REGIONAL AND LOCAL ECONOMIC TRENDS	4
	Current Regional and Local Economic and Real Estate Trends	4
	Existing Conditions and Plans	7
3.	MARKET OPPORTUNITIES AND CONSTRAINTS.....	14
	Town Improvements and Actions	14
	Opportunities Evaluation Criteria.....	16
	Opportunities and Constraints Findings.....	17
4.	CASE STUDIES	20
	Overview	20

Appendices:

Appendix A: Supportable Retail Square Footage—Village Project

Appendix B: Retail Sales Tax Leakage Analysis

Appendix C: Case Studies

Appendix D: Downtown Business Owner and Stakeholder Interviews

List of Tables

Table 1	Demographics Data for Town of Loomis and Placer County	6
Table 2	Downtown Loomis Retail and Business Supply	10
Table 3	Opportunities and Constraints Matrix	15
Table 4	Priorities for New Private Downtown Development.....	18
Table 5	Summary of Select Case Studies.....	22

1. INTRODUCTION AND SUMMARY

This report is part of the Existing Conditions Analysis being prepared for the Loomis Town Center Implementation Plan—Phase 1 Project (Town Center Project). Economic & Planning Systems, Inc., (EPS) is a subconsultant to Moore Iacofano and Goltsman, Inc., (MIG), who is preparing the Existing Conditions Analysis. The purpose of this report is to summarize opportunities and constraints for potential land uses on Town of Loomis (Town)-owned property in downtown based on direct observation, as well as on the input and thoughts from the Town Council and merchants in the Town.

Findings

This section presents the findings of the existing conditions examination and analysis of potential market opportunities and constraints. The section first summarizes major findings and then suggests several related actions for Town consideration.

Overall, in both the short- and long-term perspective, the Town should seek to create a context in which developers or individual merchants will want to take the risk to develop/locate in downtown. The context consists of both physical and economic characteristics that attract targeted customers. Targeted customers may be from a local or subregional area (i.e., the Loomis Basin area, which generally includes unincorporated areas to the north and east of the Town, including the communities of Newcastle and Penryn), or they could include that local/subregional group plus additional visitors and tourists from a much greater geographic reach. Having control of the land referred to herein as the “Town-owned property” affords the Town opportunities that it would not otherwise have if it did not control any property downtown.

Existing Conditions Findings

- 1. Existing downtown merchants primarily serve local residents and employees.** The majority of Town merchants report that most of their business is generated from residents and employees in the Town and greater Loomis Basin.
- 2. The mix of present downtown merchants provides most basic services needed by local residents and employees.** With a few exceptions, Town residents and employees can meet their basic convenience shopping and service needs (e.g., daily convenience goods and services, such as groceries, liquor, drugs, dry-cleaning, or personal grooming) through existing downtown merchants.
- 3. When compared to other cities in the Sacramento Region, Loomis experiences significant retail sales leakage to neighboring communities.** Using an update of prior analyses prepared for the Rocklin Crossings development, it appears that the Town may lose as much as 35 percent of potential taxable sales to other communities.
- 4. Existing lease rates favor use of existing retail and office space over development of new retail and office space.** Given the current economic downturn, development of new retail and office space is not economically feasible. All other things held constant,

merchants looking to locate to or expand in Loomis might first look to occupy existing vacant space given favorable lease-rate terms. Although there is not an abundant amount of vacant space in downtown, there are several properties that are available for retail and office use.

- 5. Physical and other site characteristics present challenges for both short-term and long-term private development of Town-owned property.** The long linear nature of Town-owned property, lack of visibility of the property from Taylor Road, and potential circulation and parking challenges all need to be addressed to promote private development of Town-owned property.

Opportunities and Constraints Findings

Potential development opportunities on Town-owned property are influenced by existing site conditions, current economic conditions, parking constraints and the local-serving focus of the Town and downtown businesses. As a result, this report identifies the following short-term and long-term opportunities for Town-owned property.

- 1. Private development on Town-owned property is not likely in the short term.** Downward pressure on lease rates in Loomis and surrounding areas make private development of new retail or office space in downtown infeasible. In addition, there are several vacant retail and office properties in Loomis that could accommodate new demand before new construction could be supported.
- 2. Short-term opportunities on Town-owned property could immediately assist downtown businesses.** The following Town-led actions could immediately help downtown businesses:
 - **Create additional interim or permanent parking in downtown.**
 - **Install improved streetscaping and pedestrian connections.**
 - **Create civic amenities, such as a town square or public park.**

Each of these will assist existing downtown businesses by making the downtown more inviting, more walkable, and a place that locals and others will want to visit and spend more time than would otherwise occur in downtown. Increased foot traffic and activity would assist existing downtown businesses.

- 3. Interim park, parkway, trail, open space, or parking opportunities could immediately assist downtown businesses without foreclosing on longer term private development opportunities.** While many of the short-term public land use opportunities, such as park/open space areas and temporary parking, might have a near-term benefit for downtown businesses, such uses on all existing Town-owned property might not be the highest and best use of such land in the long term. In the long term, greater income-producing private uses could be developed on Town-owned property. Also, in the longer term, future parcel reconfigurations and redevelopment may promote new private economic activity and concurrently provide additional or alternative locations for permanent parking and for civic amenities, such as parks, parkways, open space, and trails.
- 4. Opportunities for new private development are much stronger in the long term, particularly if a future commuter rail stop is created in Loomis.** Future growth in the

Town and improved market fundamentals will create opportunities for new and redeveloped retail and office uses in downtown. In addition, the potential Village project and related success of procuring a Capitol Corridor rail stop would help increase the market demand and economic feasibility for new retail and office development in downtown.

Recommended Actions

The following recommended actions are based on the market opportunities and constraints and other concepts identified in this report. As a part of the Town Center Implementation Plan Concept Development Phase, the Town should:

1. Examine whether existing businesses adjacent to Town-owned property are planning expansions and determine Town-controlled actions that could induce such expansions (e.g., zoning modifications, parcel reconfigurations, or infrastructure investment).
2. Evaluate opportunities for park, linear parkway/trail, or town square development on Town-owned property.
3. Evaluate short- and long-term opportunities to improve parking in downtown.
4. Evaluate downtown district monumentation, streetscape, street furniture, lighting, and pedestrian enhancements.
5. Consider updated design guidelines and architectural design standards to help create a unique downtown environment and achieve some consistency between land uses in accordance with General Plan goals and policies for downtown.
6. Consider commissioning an initial feasibility study to determine whether the Town could establish a Redevelopment Project Area in and adjacent to downtown to assist with downtown revitalization.

Both during and after the Town Center Implementation Plan Concept Development Phase, the Town should also consider the following economic development activities:

1. Continue to encourage the Loomis Basin Chamber of Commerce and business advertising, such as the "I Love Loomis" campaign, to actively promote downtown.
2. Promote business retention and attraction strategies.
3. Identify other policy initiatives to promote economic development activity downtown (e.g., zoning changes, expedited development processing, or financial incentives).
4. Explore public-private development strategies for the most effective use of Town-controlled property. Examples may include ground leases, annual participation lease agreements, or other arrangements.
5. Develop a downtown brand for marketing purposes.

2. REGIONAL AND LOCAL ECONOMIC TRENDS

Current Regional and Local Economic and Real Estate Trends

The bursting of the housing and credit bubbles has led to one of the deepest and most prolonged national recessions of the post-war era. Unlike several prior downturns, the present recession has affected all sectors of the national economy. In the Sacramento Region, the housing bubble burst has affected the region's employment, particularly in the areas of construction, finance, insurance, and real estate. The housing and credit markets were both significant drivers of economic activity in the region. In comparison to the peak times in 2006, Sacramento Region housing starts have rapidly fallen by. In 2009, real estate slowing continued in all sectors. For example, housing starts in the Sacramento Region fell approximately 62 percent compared to the prior year.¹

Unemployment has also risen steadily locally and at the regional, state, and national level. The South Placer area unemployment rate compares favorably to the other areas in the Sacramento Region. The May 2009 unemployment rates of 10.9 percent for Placer County and 6.9 percent for the Town compare favorably to 11.5 percent for the Sacramento Region, which includes the Counties of Sacramento, Placer, El Dorado, Yolo, Yuba, and Sutter, and 11.2 percent for the State of California. Other Placer County-area rates of unemployment include 9.0 percent (City of Auburn), 10.9 percent (City of Roseville), 7.5 percent (City of Rocklin), and 19.3 percent (City of Lincoln).

While many economists have different perspectives on when the national economy will bottom out and begin its recovery, most agree that the recovery will be very modest and gradual, occurring over a period of several years.

South Placer County Trends

Despite dismal statistics for new housing starts overall, the South Placer Region is capturing the largest percentage of new home starts of any submarket. Throughout the last year, the South Placer submarket captured the largest percentage of the new home sales market. The majority of new housing growth in the region is located in Roseville, with a smaller amount attributable to Rocklin and Lincoln.

While residential development in South Placer County has fared better than the rest of the Sacramento Region, the same cannot be said for retail and office development. Both retail and office developments suffer from conditions of over-supply and lack of demand.

High unemployment, weak consumer confidence, and record savings levels (between 7 and 10 percent) have affected retailers across almost all segments. Rare exceptions exist for

¹ Shaw, Michael, "Housing Starts Tumble 62 Percent from a Year Ago," Sacramento Business Journal, June 24, 2009.

discount retailers or discount grocery outlets. Bankruptcies of large national and regional retailers have placed many large-format retail spaces on the market, driving up retail vacancy rates. The Roseville/Rocklin submarket is experiencing the third-highest vacancy rate in the region at greater than 13 percent vacancy (almost 50 percent greater than the national average of 9.5 percent vacant). Nationally, asking and effective retail rental rates posted record declines in the first quarter of 2009.² In South Placer County, rising vacancy rates for both large and small retail space is placing downward pressure on lease rates, with lease rates ranging from \$1.50 to \$2.25 on a triple-net basis.³

Similarly, the South Placer County office market is marred with excess space, giving it at or near the highest office vacancy rates in the Sacramento Region (approximately 30-35 percent). Like the rest of the Sacramento Region, high unemployment has resulted in less office space demand (particularly in finance, insurance, and real estate industries). Also, many new office projects that began some time in 2007 are now coming to market, with as much as 75 percent of the new space coming on line without signed leases. Downward pressure on lease rates have office lease rates ranging between \$1.90 and \$2.20 per square foot for full-service Class B and Class A space, respectively.

Town Demographics

Demographics for the Town and Placer County compare favorably within the context of the entire Sacramento Region, as shown in **Table 1**. Approximately 55 percent of the population is greater than the age of 34, and approximately 25 percent of the population is 55 years or older. This compares to 29 percent and 12 percent for the same categories respectively for the Sacramento Region.

While educational attainment of Town residents is below levels for the Sacramento Region, the Town's median household income is 18 percent greater than the region's. The Town has historically experienced lower unemployment than other areas. The projected employment estimates suggest a rate of unemployment of 2.7 percent for the Town compared to 3.9 percent for Placer County and 6.4 percent for the region. These projections reflect historical norms but do not take into account the current employment data. Recent Employment Development Department (EDD) data support the historical trends. The May 2009 unemployment rate for the Town is 6.9 percent; Placer County, approximately 10.9 percent; and the region, approximately 11.5 percent.

The largest concentrations of businesses in the Town are in the construction, retail, and service industries. Retail and service industries together represent approximately 53 percent of all Town businesses, compared to 64 percent for these categories in the Sacramento Region. Other industries in the local and regional total include construction, manufacturing, finance, public administration, and other category. This observation supports later conclusions regarding the amount of retail sales tax leakage that the Town presently experiences.

² Retail Market Trends United States, Grubb and Ellis, Summer 2009.

³ Marketview Sacramento Retail, CB Richard Ellis (CBRE), First Quarter 2009.

Table 1
Loomis Town Center Implementation Plan - Phase 1
Demographics Data for Town of Loomis and Placer County (2009)

Item	Town of Loomis		Placer County		Sacramento Region [1]	
Population	6,462		342,850		2,313,083	
Population by Age Group						
Less than 18 y. o.	1,320	20.4%	75,832	22.1%	577,157	25.0%
Age : 18-34	1,647	25.5%	81,916	23.9%	584,865	25.3%
Age : 35-54	1,751	27.1%	96,689	28.2%	641,661	27.7%
Age : 55-64	818	12.7%	37,896	11.1%	239,352	10.3%
Age : 65-84	784	12.1%	43,562	12.7%	232,236	10.0%
Age 85 and Over	142	2.2%	6,955	2.0%	37,812	1.6%
TOTAL (2009 Population)	6,462	100.0%	342,850	100.0%	2,313,083	100.0%
Educational Attainment (25+)						
with High School	1,011	22.5%	50,723	21.4%	334,095	22.3%
Associates	524	11.6%	22,800	9.6%	132,851	8.9%
with Bachelor's Degree	599	13.3%	48,519	20.5%	259,325	17.3%
with Advanced Degree						
Masters	142	3.2%	14,913	6.3%	83,941	5.6%
Professional School	36	0.8%	4,889	2.1%	33,575	2.2%
Doctorate	73	1.6%	1,780	0.8%	14,454	1.0%
Subtotal - Advanced Degree	251	5.6%	21,582	9.1%	131,970	8.8%
All Others (No HS, Some College, etc.)	2,641	58.7%	116,162	49.0%	774,242	51.6%
Total (25+)	4,502	100.0%	236,986	100.0%	1,499,632	100.0%
Median Household Income	\$70,357		\$83,778		\$59,842	
Employment Status (16+)						
Employment Rate	97.3%		96.1%		93.6%	
Unemployment Rate (Claritas)	2.7%		3.9%		6.4%	
Unemployment Rate (May 2009) [2]	6.9%		10.9%		11.5%	
Employees						
Construction	1,414	31.3%	14,026	8.1%	63,705	6.1%
Manufacturing	266	5.9%	10,458	6.0%	57,084	5.5%
Retail	370	8.2%	40,642	23.5%	212,328	20.4%
Finance	208	4.6%	15,671	9.1%	76,206	7.3%
Service	1,192	26.4%	64,731	37.4%	434,452	41.7%
Public Administration	88	1.9%	11,977	6.9%	99,176	9.5%
Other	978	21.7%	15,603	9.0%	99,762	9.6%
TOTAL	4,516	100.0%	173,108	100.0%	1,042,713	100.0%
Number of Businesses						
Construction	84	17.8%	1,765	11.3%	8,141	9.0%
Manufacturing	22	4.7%	523	3.3%	3,307	3.6%
Retail	88	18.6%	2,991	19.1%	17,237	19.0%
Finance	44	9.3%	1,971	12.6%	9,919	10.9%
Service	166	35.1%	6,651	42.5%	41,312	45.4%
Public Administration	5	1.1%	335	2.1%	2,034	2.2%
Other	64	13.5%	1,404	9.0%	8,959	9.9%
TOTAL	473	100.0%	15,640	100.0%	90,909	100.0%

"loomis_placer"

Source: Claritas MarketPlace; Employment Development Department; and EPS.

[1] Sacramento Region includes the Counties of Sacramento, Placer, El Dorado, Yolo, Yuba, and Sutter.

[2] Preliminary Labor Force Data for Cities and Census Designated Places (not seasonally adjusted) from Employment Development Department.

[3] Daytime Population includes employees and those not in the labor force (older than 16 years of age).

Finally, the areas in South Placer County surrounding the Town have strong demographics. Educational attainment, median household, and occupation all improve for areas just outside the Town (i.e., within a 5-mile radius).⁴

Future Growth

The average annual population growth rate for the Town has held relatively steady at between 0- and 2.0-percent average annual growth. If approved, one planned project—The Village at Loomis—could change the Town’s growth rate. The proposed mixed use development project, described in more detail below, could increase the Town’s population by approximately 15 percent when completed. To the extent that local businesses could capture a portion of the new residents’ purchasing power, the increased residents and increased purchasing power could help existing and new downtown businesses.

Using a standard calculation to derive supportable retail space, EPS calculated the estimated total amount of commercial space that might be supported by new residents at the Village project. Based on existing median income of the area and assumptions about local capture of resident purchasing power from Gregory Stoeffel & Associates,⁵ **Table A-2** shows that new residents of the Village project might support approximately 25,000 square feet of retail commercial space. Detailed calculations used to derive the findings presented in **Table A-2** are included in **Appendix A**.

If the Village project were entirely residential, at buildout, the project could add demand for approximately 25,000 square feet of local-serving retail development. However, as proposed, the project plans to provide approximately 45,000 square feet of retail space along with approximately 10,000 square feet of office space. To the extent that all or a large portion of the additional locally captured purchasing power from new Village project residents is captured on-site by new retailers, the additional resident-driven purchasing power would have a lower benefit to existing businesses in the downtown along Taylor Road compared to if the Village project were all residential. A more specific amount and extent of potential benefit or lack of benefit to downtown businesses would ultimately depend on the final Village project land use plan and also ultimately on whether the types of new retail uses in the Village project competed with or complemented downtown businesses.

It is important to point out that this analysis is not making suggestions or reaching any conclusions regarding the proposed Village project that may be considered by the Town Council.

Existing Conditions and Plans

Site Conditions and Context

The Loomis Town Center includes the areas along Taylor Road and Horseshoe Bar Road in the Town. On Taylor Road, uses are concentrated in the “shed-to-shed” area, which is the area

⁴ Retail Opportunities for Lowell Development’s Mixed Use Site Near I-80 and Horseshoe Bar Road (Draft), Gregory Stoeffel & Associates, September 2006.

⁵ Ibid.

between High-Hand Nursery to the west, and the Blue Goose Fruit Shed to the east. Many buildings in this area are historic, and most businesses are locally owned. This area includes a few residences, as well as a mix of retail, office, and restaurants. In the core of this area, the new Loomis Depot community building and the new Town Hall provide strong civic presence.

On Horseshoe Bar Road, there is a concentration of retail and other commercial uses at each end. The south end that intersects with Interstate 80 includes the Raley's supermarket development, with adjacent chain restaurants and cafés, as well as services such as dry cleaners or beauty shops. At the north end, the retail and commercial efforts are small businesses or restaurants. In the middle, Horseshoe Bar Road features a mix of single-family residences, small businesses (some in old single-family homes), and institutional uses, such as the Veteran's Memorial Hall, the Loomis branch of the Placer County Library, and Station 28 of the Loomis Fire Protection District.

Although Interstate 80 serves regional travel needs beyond Loomis, Taylor Road and Horseshoe Bar Road remain important routes for local automobile and truck access. Several major and minor arterials intersect Taylor Road and connect it with the rest of the Town. Horseshoe Bar Road is the main entry point to Loomis from Interstate 80.

Taylor Road is a local transit corridor served by hourly Placer County Transit shuttle service connection. The shuttle allows public transit connection to Amtrak in nearby Auburn, as well as a connecting bus to Sacramento Light Rail. The Multi-Modal Transit Center adjacent to the Loomis Depot is a "park-and-ride" area, encouraging commuters to use public transit.

While Taylor Road and Horseshoe Bar Road both serve auto and truck traffic well, an opportunity exists to create a better balance between all modes of transportation. A passenger rail stop would be very well received. Also, the planned Doc Barnes Extension will provide an opportunity to eliminate large truck traffic from Horseshoe Bar Road, increasing safety and reducing noise in the Town Center area.

Current Town Planning Documents

New development and redevelopment in the Town's downtown is guided by the Town's 2001 General Plan and by the Loomis Town Center Master Plan Land Use Plan and Design Guidelines (Town Center Master Plan), adopted December 1992. Many of the following Town Center Master Plan goals ring true today with Town council members and members of the community in that goals of the Town Center Master Plan are to:

- Provide opportunities for new residences, businesses, and a shopping center, while strengthening the Taylor Road shopping district and the character of existing neighborhoods.
- Maintain the rural character of Loomis.
- Provide frequent and multiple street and trail connections to reduce reliance on arterials, to provide direct pedestrian routes, and to minimize traffic on any one neighborhood street.
- Create public places and features that meet Loomis' needs and celebrate its unique identity.
- Conserve important natural features and provide new rural landscape features.

The 2001 General Plan added the following goals for its Town Center:

- Promote the economic stability of the Town.
- Provide goods and services for residents.
- Revitalize Taylor Road.
- Create a civic center.
- Develop and maintain downtown as a focal point for shopping and services.
- Redevelop the railroad rights-of-way to enhance Loomis' historical image.

Each of these Town Center Master Plan and General Plan goals has been considered and conclusions presented in this opportunities and constraints analysis.

Existing Downtown Loomis Businesses

Table 2 summarizes the types of businesses represented in the downtown area. The number of businesses by major category has been divided between those that are in the shed-to-shed portion of downtown compared to all others. The shed-to-shed area in downtown is that area located along Taylor Road between the High-Hand Nursery on the southwest and the Blue Goose Fruit Stand on the northeast. The majority of all storefront retail and service-related businesses in Loomis are located in downtown—either along Taylor Road or along Horseshoe Bar Road.

The distribution of stores by retail or other category does not vary greatly when comparing the shed-to-shed area with the remainder of downtown. Overall, retail uses appear to represent approximately 55 to 60 percent of all downtown businesses, while professional and other business services represent approximately 35 percent.

The primary customer base for many Town businesses is local residents, school attendees (including those that do not reside in the Town), and local employees. Other customers of local businesses also originate from the communities of Newcastle, Penryn, Ophir, Auburn, and other parts of unincorporated South Placer County. Given the amount and type of retail, office, and other service offerings in Roseville and Rocklin, fewer Loomis customers originate from these more-heavily populated areas. There are, however, two notable exceptions. The first is the experiences of businesses in the Raley's-anchored shopping center at Horseshoe Bar Road and Interstate 80, who, because of their proximity to the freeway, experience more non-local business than other Town businesses. The second exception is the High-Hand Nursery, Conservatory, and Art Gallery, which estimates that approximately 90 percent of its business is generated by people originating from outside Loomis.

While the Town has service providers in most major categories of service providers, there are potential opportunities, particularly in the longer term, for new businesses to locate in the Town that would complement rather than compete with existing businesses. The specific discussion about potential opportunities is presented later in this report.

Summary of Retail Leakage Analysis

To estimate retail sales leakage, an analyst can compare estimated household spending by major retail category in a market area to actual sales by category for that same market area. While overall Town sales are available for the Town, the State Board of Equalization (SBE) does not

Table 2
Loomis Town Center Implementation Plan - Phase 1
Downtown Loomis Retail and Business Supply

Facility/Retail Category	Number of Stores			Approx. % Share
	"Shed-to-Shed"	Other Downtown	Estimated Total	
Apparel Stores	≤ 5	≤ 5	≤ 5	5%
Automotive	≤ 5	≤ 5	5	5%
Eating and Drinking Places				
Quick Service	≤ 10	≤ 5	15	14%
Full Service	≤ 5	≤ 5	5	5%
Drinking Places	≤ 5	≤ 5	5	5%
Subtotal			25	23%
Food Stores	≤ 5	≤ 5	5	5%
General Merchandise Stores	≤ 5	≤ 5	5	5%
Household Goods	≤ 5	≤ 5	5	5%
Personal & Business Services				
Finance, Insurance, and Real Estate	≤ 5	≤ 10	15	14%
Health Services	≤ 5	≤ 10	10	9%
Personal Services	≤ 5	≤ 5	5	5%
Other Services	≤ 5	≤ 5	10	9%
Subtotal			40	36%
Public & Community Facilities	≤ 5	≤ 5	5	5%
Specialty Stores	≤ 10	≤ 10	15	14%
ESTIMATED TOTAL FACILITIES			110	100%

"downtown_summ"

Source: Loomis Basin Chamber of Commerce and EPS.

break down sales for some categories given the relatively few merchants in some categories. Consequently, assumptions need to be made about the distribution of retail sales by major retail category.

This analysis relies on prior work on this subject completed by CBRE Consulting, Inc., and Applied Development Economics (ADE). Using the December 2006 Economic Impact Analysis prepared by CBRE Consulting, Inc., and the ADE peer review of the CBRE analysis, EPS prepared an updated 2009 retail leakage analysis for the Town. The detailed calculations are included in **Appendix B**. As the Town Council is keenly aware, the Town suffers from significant retail sales leakages to surrounding areas—primarily the Roseville/Rocklin area. Aside from automotive dealers and supplies that represent approximately 70 percent of the total estimated leakage, the largest categories of retail sales leakage appear to be these:

- General merchandise
- Eating and drinking places
- Service stations

This information can be helpful for identifying future private land use and business opportunities that might help to curb some of the retail sales leakage from the community.

Lease Rate Survey

As part of this work program, the Town requested a summary of the lease rates and terms for businesses in the shed-to-shed area along Taylor Road. Promoters of the “I Love Loomis” Web site and the Town agreed that the ownership and lease-rate questions be included with a survey being conducted by “I Love Loomis” backers. In addition to this survey, EPS also surveyed several businesses and conducted its own research regarding lease rates. Below is a summary of the data and responses collected.

Most businesses in the shed-to-shed area have short-term leases ranging from 1 to 3 years in length. Most leases are expressed in triple-net terms, meaning that the lease amounts are net of real estate taxes, insurance, and maintenance expenses. Triple-net lease rates for office and retail space in the shed-to-shed area range from \$0.90 to \$1.60 per building square foot, with the majority of responses ranging between \$1.00 and \$1.50 per building square foot. The lease rate data collected was from properties ranging in size from 800 to approximately 3,000 building square feet. Recent market trends, as discussed earlier, have continued to place downward pressures on lease rates in the form of lower rates, periods of free rent, or other landlord concessions considered to retain existing tenants. Based on this information, there does not appear to be any lease-rate appreciation anticipated within the next 1- to 2-year period.

By way of comparison, general retail asking lease rates for buildings greater than 20,000 square feet in the greater Roseville/Rocklin submarket average approximately \$1.97 per building square foot.⁶ Along Granite Drive in Rocklin, which is within approximately 2.5 miles of downtown Loomis, retail space asking lease rates range from \$0.80 to \$1.40 per building square foot, depending on the size of space being considered.

⁶ Marketview Sacramento Retail, CBRE, First Quarter 2009.

Planned and Proposed Projects

This section summarizes planned and proposed projects that could have an impact on downtown Loomis.

Town Hall Relocation

By December 2009, the Town will relocate its Town Hall to Taylor Road, in the center of the Taylor Road district. Once the move is completed, all the Town's employees will be located on Taylor Road. Not only will the move bring Town employees into the downtown core, but the downtown will also benefit from increased foot traffic from visitors to the Town Hall.

The Villages at Loomis

The Villages at Loomis project is described as a "unique town center infill opportunity intended to create a complete, integrated and dynamic mix of shops, work places, housing, civic space and open space appropriate for the town center."⁷ The project, consisting of approximately 54 acres, is preliminarily planned for approximately 400 residential units with a "village-themed" retail center that could contain approximately 45,000 square feet of retail space and approximately 10,000 square feet of office space. It is possible that a portion of the project could be considered for active-adults.

Rocklin Crossings

While not physically located within the Town limits, the proposed Rocklin Crossings project will have an impact on the nature of retail development that could succeed in the Town. The proposed 543,500-square-foot large-format retail center is anticipated to be anchored by a supercenter (approximately a 235,000-square-foot Wal-mart) and home improvement store (approximately a 141,000-square-foot Home Depot). In addition to the anchors, the center is planned for the following uses:

- 30,000 square feet for an apparel retailer.
- 30,000 square feet for an electronics retailer.
- 25,000 square feet for a home furnishings retailer.
- 15,000 square feet of pad sites for restaurants.
- 6,600 square feet for banks/financial institutions.
- 65,000 square feet for other non-specified retail uses.

An economic impact analysis provided with the project's environmental impact report concluded that new store sales would capture sales tax leakage in the areas of apparel, general merchandise, food stores, eating and drinking places, and building materials categories.⁸ The study did conclude that existing retailers in the areas of home furnishings and appliances and "other retail stores" would be at risk for diverted sales once the Rocklin Crossings project was completed.

⁷ The Village and Loomis Project Description, June 14, 2007.

⁸ Rocklin Crossings Economic Impact Analysis, Rocklin, California, CBRE Consulting, Inc., Sedway Group, December 2006.

In May 2008, the Town hired ADE to peer-review the CBRE economic impact analysis. The ADE analysis concluded that in addition to the affects anticipated in the CBRE analysis, local grocers and building materials stores might also be at risk of losing sales to the new Rocklin Crossings project. The extent of the diverted sales depended on assumed growth and spending patterns in the primary market area (Loomis and Rocklin).

Rocklin Pavilions

In addition to the Rocklin Crossings project, another large-format retail project (Rocklin Pavilions) was planned for Interstate 80 and Sierra College Boulevard. This approximately 375,000-square-foot project was anticipated to be anchored by a major discount retailer and large apparel store. Again, the extent to which this new center does not capture leakage of existing and future spending would have an effect on competing suppliers in the Loomis and Rocklin areas.

Overall, while these projects, once completed, will have some impact on some downtown retailers, downtown Loomis retailers would not try to compete with the large-format retail projects planned for Interstate 80 and Sierra College Boulevard. Rather, continued focus on local-serving businesses and the potential to serve visitors through unique offerings would help downtown continue to prosper.

Loomis Marketplace

Within the last year, the Town was actively processing a development application known as the Loomis Marketplace. As originally submitted, the proposed nonresidential development project proposed approximately 395,000 square feet of commercial retail space that included a planned hotel. Since that time, the application has been withdrawn, and the project may now be bank-owned.

Proposed Loomis Commuter Rail Stop

The Town has been actively seeking to locate a commuter rail stop for the Capitol Corridor train that runs from Auburn to the Bay Area through Downtown Sacramento. Based on discussions with Town staff, the ability of the Town to get a rail stop may be linked to increased population in the downtown area (e.g., through the Village or similar project).

Proposed Trails and Bikeways Master Plan

The Town recently commissioned a trails and bikeways master plan. Findings and recommendations from the trails and bikeways master plan, which was approved January 12, 2010, will influence potential market opportunities and continued economic vitality for downtown.

3. MARKET OPPORTUNITIES AND CONSTRAINTS

This section summarizes market opportunities and constraints for use of Town-owned property in downtown. Using the research conducted for this analysis, the market opportunities described below are informed by the following challenges for downtown Loomis:

1. Weak current economic conditions.
2. Insufficient or inadequate parking in certain downtown areas for both existing and potentially new private development.
3. Physical site characteristics of Town-owned property and adjacent parcels may not facilitate the highest and best use of such parcels.

Given these constraints, the opportunities matrix focuses on Town improvements or actions, both physical and policy-based, that could be employed to help stimulate existing business expansion and new private development and to help downtown continue its economic vitality.

Considering the physical and other characteristics of the Town-owned property, current market conditions, and goals and desires of the Town Council and business community, market opportunities for Town-owned property are summarized for the following timeframes:

- Short-term—0 to 3 years.
- Long-term—Greater than 3 years.

This evaluation in both the short and long term allow for consideration of opportunities that can be implemented within the short-term horizon that do not foreclose larger, more extensive opportunities that may be implemented in the longer term horizon.

Table 3 presents a summary of opportunities for Town-owned property in both the short and long term. The following sections describe the Town improvements and actions evaluated and the criteria used to rank the relative priority of each.

Town Improvements and Actions

Opportunities for use of the Town-owned (and possibly adjacent) property have been grouped into the following categories:

- New Public Parking
- New Civic Amenities
- Other Actions/Strategies

New Public Parking

New public parking includes interim or temporary parking along with permanent parking options. Permanent parking is considered for two cases: (1) assuming no change in existing parcel configurations, and (2) assuming parcels would be reconfigured.

New Civic Amenities

New civic amenities include streetscape and plaza improvements, improved pedestrian connections, district monumentation and signage, as well as development of a public park, linear parkway, or open space area with or without a water feature or other recreational amenity for children. New civic amenities also include a town square or public gathering space and a small performing arts theatre.

Other Actions/Strategies

The other actions/strategies category includes Town-led, or encouraged, actions or strategies that could be implemented to help retain existing businesses, to help existing businesses expand, and to attract new businesses.

Opportunities Evaluation Criteria

Each Town improvement or action has been prioritized using symbols to indicate these:

- High priority
- ◐ Medium priority
- Low priority

Determining whether an improvement or action was high, medium, or low priority was made for each column of the **Table 3** opportunities matrix without consideration for another column. For example, in the short term, streetscape and plaza improvements are a high priority to increase existing business activity relative to parcel reconfiguration and reuse. This is so, although the priority of each of these items in the same time period (short term) is different when considering their priority for new private development.

In both the short and long term, the following criteria were considered when evaluating and prioritizing the potential Town improvements and actions that could be implemented.

- **Complements existing and potential land uses**—This criterion evaluates whether a given opportunity would complement or otherwise help existing and planned land uses in downtown.
- **Consistency with the Town Center Master Plan**—This criterion evaluates the extent to which a planned land use would be consistent with the goals and principles of the December 1992 Town Center Master Plan.
- **Economic feasibility**—This criterion considers the potential economic feasibility of the planned land use. Economic feasibility considers adequate market demand to support private development of a land use at a level at least able to provide adequate returns to a private developer. For public and other uses, economic feasibility might also consider the ability to secure capital funding for a project or the ability to fund ongoing operating costs.
- **Compatible with current parcel configuration**—This criterion evaluates whether a potential land use opportunity could be achieved given the current parcel configurations (i.e.,

configuration of Town-owned property, as well as surrounding land uses' parcel configurations).

- **Requires public operations and maintenance funding source(s)**—This criterion indicates whether a potential land use opportunity would likely need one or more funding sources to pay for ongoing annual operations and maintenance costs.

Table 4 evaluates a subset of Town improvements or actions shown in **Table 3** for selected new private development opportunities. Regardless of the timeframe, **Table 4** illustrates the relative importance of other Town actions/strategies for different categories of new private development. For example, if the Town desired to help new private development focused on visitor-serving retail, service, restaurants, and lodging, then each of the listed Town actions and strategies would be high priority.

Opportunities and Constraints Findings

1. **Private development on Town-owned property is not likely in the short term.** Downward pressure on lease rates in Loomis and surrounding areas make private development of new retail or office space in downtown infeasible. In addition, there are several vacant retail and office properties in Loomis that could accommodate new demand before new construction could be supported.
2. **Short-term opportunities on Town-owned property could immediately assist downtown businesses.** The following Town-led actions could immediately help downtown businesses:
 - **Create additional interim or permanent parking in downtown.**
 - **Install improved streetscaping and pedestrian connections.**
 - **Create civic amenities**, such as a town square or public park.

Each of these will assist existing downtown businesses by making the downtown more inviting, more walkable, and a place that locals and others will want to visit and spend more time than would otherwise occur in downtown. Increased foot traffic and activity would assist existing downtown businesses.

3. **Interim park, parkway, trail, open space, or parking opportunities could immediately assist downtown businesses without foreclosing on longer term private development opportunities.** While many of the short-term public land use opportunities, such as park/open space areas and temporary parking, might have a near-term benefit for downtown businesses, such uses on all existing Town-owned property might not be the highest and best use of such land in the long term. In the long term, greater income-producing private uses could be developed on Town-owned property. In the longer term, future parcel reconfigurations and redevelopment may promote new private economic activity and concurrently provide additional or alternative locations for permanent parking and for civic amenities, such as parks, parkways, open space, and trails.
4. **Opportunities for new private development are much stronger in the long term, particularly if a future commuter rail stop is created in Loomis.** Future growth in the

Table 4
Loomis Town Center Implementation Plan - Phase 1
Priorities for New Private Downtown Development

Town Actions	New Private Development Categories		
	Local-Serving Retail/Service/ Restaurant	Residential and Mixed Use	Visitor-Serving Retail/Service/ Restaurant/Lodging
New Public Parking	●	●	●
New Civic Amenities	●	●	●
Other Actions/Strategies			
Parcel reconfiguration and reuse	○	◐	●
Rezoning for downtown uses	◐	●	●
Downtown Branding/Marketing	◐	◐	●
Form Redevelopment Project Area	◐	●	●

"dev opp matrix"

[1] Could include underground of above-ground utilities.

- - High Priority
- ◐ - Medium Priority
- - Low Priority

Town and improved market fundamentals will create opportunities for new and redeveloped retail and office uses in downtown. In addition, the potential Village project and related success of procuring a Capitol Corridor rail stop would help increase market demand and economic feasibility for new retail and office development in downtown. New retail and office projects should target market opportunities that complement existing downtown businesses and help to support and expand the economic vitality of downtown.

4. CASE STUDIES

Overview

In addition to other methods, this analysis uses a case-study approach to compare and contrast the case-study areas with Loomis as a means to identify potential opportunities and challenges related to development in downtown. Overall, the case-study analysis will assist with these:

- Identifying economic development and other strategies the Town might employ to promote economic vitality for downtown businesses.
- Identifying actions taken by communities to improve their downtown's economic prosperity.
- Identifying categories and types of users that may be good opportunities for Loomis.

Case-Study Selections

EPS and MIG identified case-study areas based on the following inputs and attributes:

- Input from Town Staff, Town Council, and Town Center Implementation Plan Stakeholders.
- Similar populations and area demographics.
- Similar downtowns (e.g., size, physical characteristics, and traffic volumes).
- Economic vitality of downtowns.

Based on the above criteria, EPS and MIG identified the following case-study areas with which to compare and contrast with downtown Loomis:

- City of Auburn
- City of Healdsburg
- City of Nevada City
- City of Sutter Creek
- City of St. Helena
- City of Santa Rosa
- Town of Windsor
- City of Winters
- Fourth Street Area in Berkeley

Appendix C contains demographic and other comparative information for the case-study areas.

Case Studies Findings

1. **Most, if not all, areas transitioned from primarily local-serving goods and service providers to either a combination of local- and visitor-serving or primarily visitor-serving areas.**

2. Many areas promote their downtowns through a link to the region's history or through a tie to the region's dominant industry (e.g., gold-rush past or winery/other agriculture).
3. Most areas have established Redevelopment Project Areas to assist with downtown revitalization. In many cases, the downtown areas are part of a larger Redevelopment Project Area.
4. Most areas have completed physical improvements to enhance parking, pedestrian circulation, and overall physical appearance of the area (e.g., streetscape improvements or district monumentation).
5. In the areas that embrace visitors and tourists, most have an adequate supply of lodging facilities to accommodate overnight guests.

Economic Development and Other Strategies

As discussed in the findings above, most of the case-study areas have embraced regional and other out-of-the-area guests and visitors as a means to promote and strengthen their downtowns. The following sections describe some of the actions that have been taken by jurisdictions in the case-study areas. **Table 5** summarizes some of the actions and strategies that have been employed in selected case-study areas.

Programs and Strategies

In reviewing the case-study areas, it is apparent that successful small downtowns and neighborhoods share the following set of plans and programs designed to promote the economic vitality of downtown merchants:

- Active downtown merchant associations.
- City/Town support for downtown merchant associations.
- Formation of Redevelopment Project Areas.
- Cooperative local and regional marketing efforts.
- Architectural design guidelines.
- Stated economic development principles.
- Business retention and attraction strategies.

These strategies are common for all successful downtowns, not just those seeking to outreach to out-of-area visitors and guests.

Redevelopment Project Area Formation

The Town may consider commissioning a study to determine the viability of forming a California Redevelopment Project Area as permitted under California law. A Redevelopment Agency (RDA) is empowered to issue debt secured by property tax increment revenue, which can be used to assemble land, invest in infrastructure, and rehabilitate structures to encourage private investment. Many California cities have successfully used RDAs to help finance and implement revitalization efforts in designated Redevelopment Project Areas, which have been targeted for economic development.

Table 5
Loomis Town Center Implementation Plan - Phase 1
Summary of Select Case Studies [1]

Item	Town of Loomis	City of Healdsburg	City of Nevada City	City of St. Helena	Town of Windsor
Demographic Characteristics					
Population (1-mile)	4,712	7,312	3,432	5,210	16,105
Median Household Income (1-mile)	\$66,729	\$53,569	\$46,558	\$77,269	\$77,097
Physical Characteristics					
Configuration	Linear Less Than 1/2 Mile	Several small sq. blocks	Linear	4-block street	Several small sq. blocks
Parking	On-street, off-street (private and public lots)	On-street, off-street (private and public lots)	On-street metered, limited off-street (private), limited off-site (public)	On-street 3 hour limit downtown, plentiful on-street, off-street	Plentiful on-street, off-street (private and public lots)
Other Characteristics					
General Downtown Theme(s)	Antique/specialty shopping	Agritourism district Art & entertainment district	Historic district Main Street USA Art & entertainment district Antique/specialty shopping	Agritourism district Art & entertainment district	Agritourism district Art & entertainment district Antique/specialty shopping
Downtown in Redevelop. Project Area	No	Yes	No	No	Yes
Civic Amenities	Depot building (community center), park and ride lot	Reconstructed a 1.0 acre park, streetscape, improvements incl. surface, sidewalks, landscaping, drainage improvements	Funded by community groups: historical displays, monuments, and public spaces; public restrooms and parking; street beautification	Street beautification efforts (landscaping and painting)	A 4.5 acre Town Green w/ bandstand, fountain, pools, historical timeline walk, and children's play area
Primary Market Served	Local and Loomis Basin	Highly-tourism-oriented	Historic Downtown, Highly tourism-oriented	Historic Downtown, Highly tourism-oriented	Historic Downtown, Highly tourism-oriented
Types of Stores	Banks, nursery, farmers market/produce stand, franchise quick service restaurant, neighborhood-serving retail	Wine stores, restaurants, boutiques, art galleries, community-serving retail, cafes, specialty stores, hotels	Hotels, saloons, bistros, boutiques, art galleries, goldsmith /jewelry	Wine stores, restaurants, boutiques, art galleries, restaurants, specialty stores, banks, spas, hotels, retail stores	Wine stores, restaurants, specialty cuisine, gift shops, restaurants, spas, hotels, community-serving retail, antique stores, banks
Unique Attributes	Adjacent to elementary school, near high school, historic community center	Surrounded by over 60 Wineries, Healdsburg Museum, River Rock Casino	Nevada City Theater, Entire downtown district is a national historic landmark	Silverado Museum The White Barn (performing arts theater)	Windsor Water Works and Slides

"demo4"

[1] See Table C-3 in Appendix C for additional information and case studies.

Tax-increment revenues are generated by any increase in assessed value in a Redevelopment Project Area, above the base value at the time the Redevelopment Project Area was established. State law requires that 20 percent of redevelopment revenues be placed in a housing set-aside fund to support the development and improvement of a community's affordable housing stock. Other RDA funding sources may include grants, loans, and tax allocation bonds (to be paid back using future tax increments).

Formation of a Redevelopment Project Area is governed by the Redevelopment Law of the State of California Health and Safety Code Section 33000 et seq. The legal justification for use of the extraordinary public powers authorized by Community Redevelopment Law is the elimination of blight.⁹ The legislative description of blight has evolved over the years, generally becoming more restrictive with the passage of time.¹⁰

As defined in the Health and Safety Code Sections 33030 and 33031, a Redevelopment Project Area must be predominantly urbanized and an area in which the combination of physical and economic conditions, set forth below [in Health and Safety Code Section 33031], is so prevalent and so substantial that it causes a reduction of, or lack of, property use of the area to such an extent that it constitutes a serious physical and economic burden on the community that cannot reasonably be expected to be reversed or alleviated by private enterprise, or governmental action, or both, without redevelopment.

The findings of blight apply to the whole area in a Redevelopment Project Area and not to all specific parcels in the area. However, it is important to note that nonblighted properties may be included only if their inclusion is necessary for the effective redevelopment of the area of which they are a part.¹¹ Listed below are selected examples of physical and economic conditions that cause blight that may be applicable findings for a potential Redevelopment Project Area in the Town.

Physical Blight

- Conditions that prevent or substantially hinder the economically viable use or capacity of buildings or lots. These conditions may be caused by buildings of substandard, defective, or obsolete design or construction, given the present general plan, zoning, or other development standards.
- Adjacent or nearby incompatible land uses that prevent development of those parcels or other portions of the project area.
- The existence of subdivided lots that are in multiple ownership and where physical development has been impaired by their irregular shapes and inadequate sizes, given present general plan and zoning standards and present market conditions.

⁹ Redevelopment In California, McDonough Holland & Allen PC Attorneys at Law, Solano Press Books 2007 Supplement.

¹⁰ Ibid.

¹¹ Ibid.

Economic Blight

- Depreciated or stagnant property values.
- Abnormally high business vacancies, abnormally low lease rates, or an abnormally high number of abandoned buildings.

As indicated in **Table C-3**, many downtown areas in a Redevelopment Project Area are actually part of a larger Redevelopment Project Area or are one area of many in the jurisdiction. For example, in Healdsburg and Winters, the Redevelopment Project Areas include almost the entire area within the jurisdiction's limits. In other examples, like the City of Santa Rosa, the downtown Redevelopment Project Area is just one of many Redevelopment Project Areas administered by the jurisdiction's RDA. In each of these cases, the total administrative cost of running a RDA is leveraged over a larger area with the ability to achieve some economies of scale in agency administrative costs.

Specific steps to form a RDA and to create a Redevelopment Project Area are described in Government Code Section 33000 et seq. In cases such as the Town, not only would the Town be creating a Redevelopment Project Area, but also, the Town would need to establish a RDA to administer the Redevelopment Project Area.

Specific considerations regarding a Redevelopment Project Area formation for the Town include these:

- Findings of physical and economic blight.
- Elimination of blight and downtown revitalization goals.
- Potential size of proposed Redevelopment Project Area (i.e., include areas outside of downtown).
- Administrative cost of operating a RDA.

Without formal designation of a survey area (an initial required step in Redevelopment Project Area formation) and conclusions of an initial feasibility analysis, it is not possible to make determinations about the potential success of Redevelopment Project Area formation for the Town. As demonstrated in the case studies, many small downtowns and neighborhoods have benefited from the planning and financing powers that are authorized under Community Redevelopment Law.

Retail Categories and Concepts

These retail categories have been successful in case-study downtown areas:

- Restaurants, especially those with outdoor dining, evening entertainment, and restaurant/bar combinations (e.g., brewery restaurant).
- Coffee shops and diners with unique themes (e.g., local history or local artists).
- Specialty food stores (e.g., gourmet grocery stores, bakeries, or candy shops).
- New and vintage clothing boutiques.

- Home décor and gift stores focused on regional products.
- Art galleries.
- Craft studios and cooking schools.
- Youth-oriented businesses (e.g., cafés and restaurants with all-ages entertainment, board shops, sporting goods stores, or toy and game stores).

In each of these categories, the majority of retail establishments in case-study areas are either independent, locally owned businesses, or members of small regional or statewide chains. While these potential retail categories may help the Town to identify potential future businesses that could complement existing ones, EPS's professional experience suggests that the specific mix of uses in a downtown environment should not be over-programmed or preprogrammed by the public sector at the conceptual stage of downtown area planning.

While not specifically preprogramming downtown retail and other uses, many of the case-study area downtowns have evolved to take on one or more of the following themes:

- Main Street USA
- Art and entertainment district
- Historic district (including antique/specialty shopping)
- Agritourism district
- Antique/specialty shopping
- Home décor/improvement

The primary theme of an area is often front and center in area marketing and promotion of that area's offerings. Many areas create a downtown branding strategy based on the primary theme of the area.

Civic Amenities and Other Actions to Support Downtown Development

In addition, many of the case-study areas actively took steps to improve the look and feel of their downtown areas through physical improvements to entryways, roadways, street lighting, and buildings. Physical improvements typically included these:

- Streetscape and plaza improvements (including undergrounding utilities).
- Pedestrian connections.
- Increased parking and access to buildings.
- Improved street lighting.
- Improved signage and downtown district monumentation.
- Building façade improvement programs.

In addition to physical enhancements and improvements, local jurisdictions often undertake one or more of the following actions to promote downtown development:

- Zoning changes to permit more flexible uses or to restrict certain uses.
- Expedited development application processing.

- Development impact or other fee waivers.
- Assistance with land assembly (i.e., to create larger, more contiguous parcels).
- Increased traffic flow control (e.g., narrower streets to slow down traffic).
- Increased public safety presence.
- Support for Business Improvement Districts or other special assessments for enhanced local services (e.g., enhanced levels of lighting, public safety, landscape maintenance, or trash removal).
- Grants or no-/low-interest loans or other programs (e.g., CDBG funds) for building façade and other improvements.
- Public-private partnerships that can engage both the public and private sectors in mutually beneficial development opportunities to the benefit of the entire area.

Many of these actions are identified as goals and policies in the economic development element in the General Plan.

Potential Loomis Opportunities

In comparing and contrasting Loomis to case-study areas, one can draw conclusions about categories and types of users that could be considered for future development opportunities. The goal of considering types of future users is to identify ones that would help to complement and enhance existing downtown businesses rather than compete with them.

As discussed earlier in this report, many of the potential opportunities for new private development would occur in the long term rather than the short term. The market economics to support new development to accommodate one or more of the land uses described later in this section must improve to induce investors. If a new tenant were choosing to operate in downtown at this time, he or she would likely choose to locate to existing space, given the low lease rate and favorable terms offered at this time.

Given the amount of competing supply in surrounding areas of Roseville, Rocklin, and Auburn, Loomis should not compete for large-format, value-oriented retailers and grocery-anchored centers. The strong trade area demographics support opportunities for Loomis to compete in both the short and long term for local-serving convenience retail and higher end specialty items like many of those described below.

Without any significant shift in Town strategy, in the medium to long term (next 3 to 5 years), new merchants to downtown would need to satisfy locally generated demand that is not being met by existing businesses. In reviewing existing businesses and comparing them by major category to the case-study areas, potential underrepresented uses that might be able to capture demand without detracting from existing businesses might include these:

- Wine bar/tasting places
- Small cafés and bistros
- Specialty small tool/hardware store
- Specialty kitchen supply store

- Book store
- Day spa/retreat
- Local/regional artist gallery
- Sporting goods (specialty or other)
- Ice cream/yogurt/candy shop
- Child/day care
- Cards/gifts/florists
- Gas station
- Agricultural/gardening supplies

Again, if the Village project were to develop, additional local demand could be accommodated through a combination of new merchants both in the project and in the larger downtown area.

The primary issue for the Town to decide is whether it should primarily service local residents and customers or whether it should strive to serve both local residents and customers plus visitors. This issue should be adequately vetted and resolved before the Town makes decisions regarding the future use of Town-owned property.



APPENDICES:

- Appendix A: Supportable Retail Square Footage—
Village Project
- Appendix B: Retail Sales Tax Leakage Analysis
- Appendix C: Case Studies
- Appendix D: Downtown Business Owner and
Stakeholder Interviews



APPENDIX A:
Supportable Retail Square Footage—
Village Project

Table A-1	Proposed Village Project Area Total Personal Income	A-1
Table A-2	Village Project Area Retail Demand Potential by Residents.....	A-2
Table A-3	Land Use Summary for the Proposed Village Project	A-3
Table A-4	Total Taxable Sales in Placer County.....	A-4

Table A-1
Loomis Town Center Implementation Plan - Phase 1
Proposed Village Project Area Total Personal Income (2009\$)

Village I Project Area [1]	Source	Formula	Total
Number of Residential Units	Table A-3	A	429
Number of Residents	Table A-3	B	1,163
Persons per Household		$C = B / A$	2.7
Total Household Income [2]	Claritas	D	\$70,400
Total Per Capita Income		$E = C / D$	\$25,975
Total Personal Income		$F = B * E$	\$30,201,600
Total Personal Income (\$000)		$G = F / 1,000$	\$30,202

"project_TPI"

Source: Village at Loomis Plan, June 2007, Claritas MarketPlace, and EPS.

[1] Assumes project at buildout.

[2] According to Claritas MarketPlace, the median Loomis household income in 2009 was \$70,400.

Table A-2
Loomis Town Center Implementation Plan - Phase 1
Village Project Area Retail Demand Potential by Residents (2009\$)

Store Category	Project Area Expenditure Potential (\$000)		Expenditure Potential (\$000)		2009 Supportable Retail Sq. Ft.	
	% of Countywide TPI	Total Retail Expenditure Potential [1]	Local Capture Rate [2]	Total Expenditures	Retail Sales per Sq. Ft. [3]	Total Sq. Ft. of Retail Space Demanded
<i>Source</i>	<i>Table A-4</i>		<i>EPS</i>		<i>Table 6</i>	
<i>Formula</i>	<i>A</i>	<i>B = A x TPI</i>	<i>C</i>	<i>D = B x C</i>	<i>D</i>	<i>E = C / D</i>
Retail Trade						
Convenience Goods						
Food Stores	3.8%	\$1,141	30%	\$342	\$345	993
Shoppers Goods						
Apparel Stores	2.6%	\$777	30%	\$233	\$170	1,374
General Merchandise Stores	10.0%	\$3,029	30%	\$909	\$128	7,099
Household Goods	3.6%	\$1,087	30%	\$326	\$160	2,041
Other Retail Stores	4.6%	\$1,392	30%	\$418	\$461	906
Specialty Stores	5.9%	\$1,771	30%	\$531	\$165	3,216
Building Materials	6.2%	\$1,866	30%	\$560	\$315	1,778
Eating and Drinking Places	7.4%	\$2,237	80%	\$1,789	\$233	7,670
Total Retail Trade [4]	44.0%	\$13,300	38%	\$5,108		25,076
<i>Rounded</i>						<i>25,000</i>

"proj_sum"

Source: California Board of Equalization, Urban Land Institute, International Council of Shopping Centers, and EPS.

[1] Total Personal Income (TPI) for proposed Villages is \$30,201,600. See Table A-1.

[2] Local capture rate assumes new retail development fulfilling the corresponding retail category.

[3] Sales per sq. ft. represents the average sales per square foot for a variety of stores in the category obtained from the ULI Dollars and Cents of Shopping Centers. General Merchandise sales per sq. ft. is calculated as a weighted average of retail categories included in the General Merchandise category (Including Apparel, Furniture/Housewares, Building Materials, Automotive, and Other).

[4] Total Retail Trade excludes "Automotive Retail" (29.9%) and all non-Retail taxable and non-taxable business transactions (26.1%).

**Table A-3
Loomis Town Center Implementation Plan - Phase 1
Land Use Summary for the Proposed Village Project**

Land Use Type	The Villages at Loomis			
	Total Acres	Residential Units	Number of Residents [1]	Nonresidential Sq. Ft.
<u>Residential</u>				
Single-Family Residential				
Medium Density	18.6	148	414	-
High Density	10.2	204	571	-
Subtotal Single-Family Residential	28.8	352	986	-
Multifamily Residential	3.1	77	177	-
Total Residential	31.9	429	1,163	-
<u>Nonresidential</u>				
General Commercial	4.1	-	-	45,000
Office [2]	2.8	-	-	30,500
Total Nonresidential	6.9	-	-	75,500
<u>Remaining Public/Quasi-Public</u>	14.9	-	-	-
TOTAL	53.7	429	1,163	75,500

"lu"

Source: The Village at Loomis Plan, June 2007 and EPS.

[1] Assumes average persons per household of 2.8 for single-family and 2.3 for multifamily residential.

[2] Assumes an FAR of 0.25. Rounded to the nearest 500 square feet.

Table A-4
Loomis Town Center Implementation Plan - Phase 1
Total Taxable Sales in Placer County (2007\$) [1]

Store Category	Total Taxable Sales (000\$)	% of Total Countywide Taxable Sales	% TPI Spent on Retail
Retail			
Apparel Stores	\$193,281	2.6%	3.5%
Automotive	\$2,247,148	29.9%	40.5%
Building Material	\$463,873	6.2%	8.4%
Eating and Drinking Places	\$556,057	7.4%	10.0%
Food Stores	\$283,527	3.8%	5.1%
General Merchandise Stores	\$752,994	10.0%	13.6%
Household	\$270,218	3.6%	4.9%
Other Retail Stores	\$346,048	4.6%	6.2%
Specialty Stores	\$440,301	5.9%	7.9%
Total Retail Total	\$5,553,447	74.0%	100.0%
All Other Outlets (Not Retail)	\$1,747,971	23.3%	
Business and Personal Services	\$206,539	2.8%	
Total Taxable Sales	\$7,507,957	100.0%	

"perc_taxable"

Source: California Board of Equalization and EPS.

[1] Data for 2007 is the most recent complete year data available.



APPENDIX B:

Retail Sales Tax Leakage Analysis

Table B-1	Estimated Retail Leakage Analysis for Town of Loomis	B-1
Table B-2	Estimated Aggregate Retail Spending for Town of Loomis.....	B-2
Table B-3	Estimated Aggregate Taxable Sales in Town of Loomis.....	B-3

Table B-1
Loomis Town Center Implementation Plan - Phase 1
Estimated Retail Leakage Analysis for Town of Loomis (2009\$)

Retail Category	2009 Aggregate Spending	2009 Retail Sales	Surplus/ (Leakage)	Rounded
<i>Source</i>	<i>Table B-2</i>	<i>Table B-3</i>		
Apparel Stores	\$2,571,937	\$3,283,183	\$711,246	\$711,000
General Merchandise	\$10,851,858	\$3,283,183	(\$7,568,675)	(\$7,569,000)
Food Stores	\$10,000,679	\$7,632,604	(\$2,368,075)	(\$2,368,000)
Eating and Drinking Places	\$9,883,431	\$6,691,249	(\$3,192,181)	(\$3,192,000)
Home Furnishing and Appliances	\$3,688,542	\$3,283,183	(\$405,359)	(\$405,000)
Building Materials	\$2,847,597	\$8,329,946	\$5,482,350	\$5,482,000
Auto Dealers and Supplies	\$20,561,639	\$3,283,183	(\$17,278,456)	(\$17,278,000)
Service Stations	\$6,475,220	\$3,283,183	(\$3,192,037)	(\$3,192,000)
Other Retail	\$4,763,062	\$7,863,863	\$3,100,801	\$3,101,000
TOTAL	\$71,643,964	\$46,933,578	(\$24,710,386)	(\$24,710,000)

"retail_leakage"

Source: Claritas MarketPlace; California Board of Equalization; CBRE/Sedway Group; ADE, Inc; US Bureau of Labor Statistics; and EPS.

B-1

Table B-2
Loomis Town Center Implementation Plan - Phase 1
Estimated Aggregate Retail Spending for Town of Loomis (2009\$)

Retail Category	2009 Aggregate HH Spending [1]	2009 Loomis & Rocklin Population [2]	Spending Per Capita	2009 Est. Loomis Population [3]	2009 Est. Loomis Aggregate Spending
<i>Source</i>	<i>ADE/BLS/CBRE</i>	<i>CBRE</i>		<i>Claritas</i>	
Apparel Stores	\$24,946,432	62,678	\$398	6,462	\$2,571,937
General Merchandise	\$105,257,311	62,678	\$1,679	6,462	\$10,851,858
Food Stores	\$97,001,325	62,678	\$1,548	6,462	\$10,000,679
Eating and Drinking Places	\$95,864,076	62,678	\$1,529	6,462	\$9,883,431
Home Furnishing and Appliances	\$35,776,920	62,678	\$571	6,462	\$3,688,542
Building Materials	\$27,620,190	62,678	\$441	6,462	\$2,847,597
Auto Dealers and Supplies	\$199,437,082	62,678	\$3,182	6,462	\$20,561,639
Service Stations	\$62,806,224	62,678	\$1,002	6,462	\$6,475,220
Other Retail	\$46,199,195	62,678	\$737	6,462	\$4,763,062
TOTAL	\$694,908,755		\$11,087		\$71,643,964
<i>Rounded</i>	<i>\$694,909,000</i>		<i>\$11,000</i>		<i>\$71,644,000</i>

"loomis_spending"

Source: ADE, Inc.; CBRE/Sedway Group; Claritas MarketPlace; and EPS.

[1] Estimated aggregate household spending for Loomis and Rocklin by ADE, Inc from the memorandum, "Analysis of CBRE's Methodology, Assumptions, and Urban Blight Analysis (for Rocklin Crossing retail project)" (May 26, 2008).

[2] Estimated population for the Primary Market Area (PMA) shown in CBRE/Sedway Group's economic analysis of Rocklin Crossing project, also used in the ADE, Inc. report identified in footnote [1].

[3] Estimated 2009 population for Town of Loomis from Claritas Marketplace.

B-2

Table B-3
Loomis Town Center Implementation Plan - Phase 1
Estimated Aggregate Taxable Sales in Town of Loomis (2009\$)

Retail Category	Estimated Percent Share [1]	2007 Loomis Est. Aggregate Taxable Sales [2]	Estimated 2007-2009 Inflation [3]	2009 Loomis Est. Aggregate Taxable Sales
A	B	C	D	E
<i>Source</i>	<i>CBRE</i>	<i>BOE</i>	<i>BLS</i>	
Apparel Stores	7.0%	\$3,177,862	\$105,321	\$3,283,183
General Merchandise	7.0%	\$3,177,862	\$105,321	\$3,283,183
Food Stores	16.3%	\$7,387,758	\$244,846	\$7,632,604
Eating and Drinking Places	14.3%	\$6,476,601	\$214,648	\$6,691,249
Home Furnishing and Appliances	7.0%	\$3,177,862	\$105,321	\$3,283,183
Building Materials	17.7%	\$8,062,731	\$267,216	\$8,329,946
Auto Dealers and Supplies	7.0%	\$3,177,862	\$105,321	\$3,283,183
Service Stations	7.0%	\$3,177,862	\$105,321	\$3,283,183
Other Retail	16.8%	\$7,611,598	\$252,264	\$7,863,863
TOTAL	100.0%	\$45,428,000		\$46,933,578

"loomis_sales"

Source: Claritas MarketPlace; California Board of Equalization; CBRE/Sedway Group; US Bureau of Labor Statistics; and EPS.

- [1] Because taxable sales by retail category is unavailable, this analysis uses the percent share allocation shown for Town of Loomis in CBRE/Sedway Group's economic analysis of the Rocklin Crossings project.
- [2] Total taxable sales from Board of Equalization report, "Taxable Sales in California During 2007 (Sales and Use Tax)" and allocated to retail category based on column [B].
- [3] Estimated inflation based on change in CPI-U for San Francisco CMSA.



APPENDIX C: Case Studies

Table C-1	Demographic Characteristics of Case Studies	C-1
Table C-2	Demographic Characteristics of Case Studies— Percentage Share	C-2
Table C-3	Physical and Other Characteristics of Case Studies (2 pages)	C-3

Table C-1
Loomis Town Center Implementation Plan - Phase 1
Demographic Characteristics of Case Studies (2009)

Item	Town of Loomis			City of Auburn			City of Winters			City of Nevada City			City of Sutter Creek			City of St. Helena			City of Santa Rosa			Town of Windsor			City of Healdsburg		
	<i>1/2 Mile</i>	<i>1 Mile</i>	<i>5 Mile</i>	<i>1/2 Mile</i>	<i>1 Mile</i>	<i>5 Mile</i>	<i>1/2 Mile</i>	<i>1 Mile</i>	<i>5 Mile</i>	<i>1/2 Mile</i>	<i>1 Mile</i>	<i>5 Mile</i>	<i>1/2 Mile</i>	<i>1 Mile</i>	<i>5 Mile</i>	<i>1/2 Mile</i>	<i>1 Mile</i>	<i>5 Mile</i>	<i>1/2 Mile</i>	<i>1 Mile</i>	<i>5 Mile</i>	<i>1/2 Mile</i>	<i>1 Mile</i>	<i>5 Mile</i>	<i>1/2 Mile</i>	<i>1 Mile</i>	<i>5 Mile</i>
<i>Radii Focus</i>	<i>Horseshoe Bar Road & Taylor Road</i>			<i>Oakwood Drive & Lincoln Way</i>			<i>East Main Street & Railroad Avenue</i>			<i>Sacramento Street & Clark Street</i>			<i>Main Street & Eureka Street</i>			<i>Main Street & Hunt Avenue</i>			<i>Santa Rosa Plaza</i>			<i>McClelland Boulevard & DuVander Lane</i>			<i>Center Street & Matheson Street</i>		
Population (2009)	1,621	4,712	75,236	2,436	6,143	38,005	2,293	6,448	9,281	1,531	3,432	32,928	1,294	2,452	9,167	2,663	5,210	11,182	4,428	20,586	183,192	4,052	16,105	42,457	3,080	7,312	26,375
Population by Age Group																											
Less than 18 y. o.	337	959	17,462	399	1,058	6,721	670	1,922	2,643	217	471	6,031	249	456	1,628	616	1,219	2,363	906	4,545	42,850	1,127	4,571	10,935	735	1,657	6,458
Age : 18-34	398	1,184	17,580	676	1,560	8,724	609	1,707	2,420	358	829	7,561	270	517	1,807	553	1,077	2,606	1,202	5,497	43,239	894	3,453	9,224	722	1,715	6,092
Age : 35-54	445	1,277	21,897	706	1,657	9,540	603	1,714	2,479	450	1,008	8,393	333	609	2,261	713	1,375	2,990	1,448	6,248	51,665	1,173	4,648	11,920	868	1,923	7,384
Age : 55-64	189	580	8,303	281	712	4,913	201	569	898	261	578	4,787	184	348	1,258	340	682	1,529	509	2,322	22,968	424	1,764	5,191	401	969	3,369
Age : 65-84	211	603	8,837	296	878	6,522	182	471	740	197	442	4,877	218	443	1,775	326	662	1,364	302	1,563	18,308	369	1,421	4,312	281	813	2,525
Age 85 and Over	41	109	1,157	78	278	1,585	28	65	101	48	104	1,279	40	79	438	115	195	330	61	411	4,162	65	248	875	73	235	547
TOTAL (2009 Population)	1,621	4,712	75,236	2,436	6,143	38,005	2,293	6,448	9,281	1,531	3,432	32,928	1,294	2,452	9,167	2,663	5,210	11,182	4,428	20,586	183,192	4,052	16,105	42,457	3,080	7,312	26,375
Educational Attainment (25+)																											
High School Diploma	291	772	8,507	461	1,133	7,354	334	858	1,183	236	528	6,397	266	497	2,043	320	602	1,203	827	3,148	25,616	593	2,053	5,471	373	926	3,383
Bachelor's Degree	145	466	13,037	269	730	4,731	176	453	756	240	526	3,724	146	271	948	520	1,017	2,024	425	2,038	20,795	336	1,532	4,995	360	901	3,107
Advanced Degree	44	163	5,614	68	315	2,271	73	227	450	179	378	2,243	81	155	514	207	411	1,105	165	955	10,333	137	619	2,314	225	455	1,424
All Others (No HS, Some College, etc.)	648	1,880	23,725	1,053	2,441	13,691	768	2,206	3,136	517	1,197	11,567	457	890	3,440	770	1,512	3,281	1,732	8,001	65,879	1,450	5,692	14,352	1,077	2,612	9,200
Total (25+)	1,128	3,281	50,883	1,851	4,619	28,047	1,351	3,744	5,525	1,172	2,629	23,931	950	1,813	6,945	1,817	3,542	7,613	3,149	14,142	122,623	2,516	9,896	27,132	2,035	4,894	17,114
Median Household Income	\$60,268	\$66,729	\$85,626	\$45,967	\$47,095	\$57,416	\$64,706	\$67,506	\$69,845	\$46,149	\$46,558	\$47,188	\$57,176	\$54,534	\$56,167	\$75,765	\$77,269	\$77,822	\$40,138	\$47,799	\$62,731	\$69,525	\$77,097	\$72,148	\$52,013	\$53,569	\$66,597
Employment Status (16+)																											
Employment Rate	97.1%	97.4%	97.0%	95.8%	95.7%	95.7%	94.5%	93.1%	93.1%	94.4%	93.1%	95.3%	95.5%	94.9%	95.6%	95.8%	96.1%	96.9%	86.4%	92.4%	95.5%	94.8%	95.4%	96.2%	94.3%	94.3%	95.4%
Unemployment Rate [1]	2.9%	2.6%	3.0%	4.2%	4.3%	4.3%	5.5%	6.9%	6.9%	5.6%	6.9%	4.7%	4.5%	5.1%	4.4%	4.2%	3.9%	3.1%	13.6%	7.6%	4.5%	5.2%	4.6%	3.8%	5.7%	5.7%	4.6%
Employees																											
Construction	309	1,342	3,751	171	643	1,891	142	143	241	62	158	1,448	8	44	304	202	305	373	247	725	5,987	71	345	1,864	146	395	692
Manufacturing	28	220	1,453	366	537	4,762	29	30	97	99	373	2,194	54	108	308	1,898	2,861	5,287	757	1,001	6,398	10	283	2,876	503	727	1,842
Retail	461	568	5,769	1,507	2,066	6,149	949	977	1,012	608	875	6,087	205	267	2,408	1,473	1,625	2,159	3,233	4,607	26,075	310	1,369	3,607	1,811	2,013	2,729
Finance	105	142	1,879	423	862	1,751	56	59	60	189	304	2,037	45	92	486	336	403	462	1,896	2,755	8,176	87	254	820	310	378	476
Service	342	987	9,761	2,173	4,626	10,746	529	708	770	1,021	1,932	10,713	551	830	4,955	1,248	1,733	6,216	4,968	12,323	39,531	520	1,512	5,883	1,224	1,958	3,693
Public Administration	88	88	392	176	737	7,969	68	68	68	105	1,562	2,091	20	46	932	72	72	160	1,192	2,024	9,821	112	132	1,603	239	249	270
Other	104	601	2,582	1,165	1,599	2,894	123	148	521	72	134	2,002	18	64	612	307	660	1,164	848	1,408	8,056	48	370	3,407	217	427	1,493
TOTAL	1,437	3,948	25,587	5,981	11,070	36,162	1,896	2,133	2,769	2,156	5,338	26,572	901	1,451	10,005	5,536	7,659	15,821	13,141	24,843	104,044	1,158	4,265	20,060	4,450	6,147	11,195
Number of Businesses																											
Construction	24	73	384	24	144	317	22	23	29	14	29	382	5	18	73	38	50	72	48	115	876	11	84	219	19	78	129
Manufacturing	3	18	104	21	49	145	5	6	12	14	27	213	8	13	36	110	138	255	48	92	408	2	19	165	52	76	151
Retail	53	73	546	156	245	554	51	56	62	109	132	694	47	56	253	128	147	189	318	534	1,826	39	119	325	186	223	293
Finance	23	34	317	67	154	323	14	15	16	30	43	326	7	16	94	67	77	92	200	330	1,052	20	53	172	52	77	104
Service	82	143	1,163	326	633	1,342	66	83	94	246	400	1,738	51	106	452	261	328	481	888	1,646	5,007	66	250	765	233	371	604
Public Administration	5	5	27	12	42	154	11	11	11	9	54	103	4	6	86	9	9	164	74	82	203	13	16	45	24	25	29
Other	19	54	312	37	104	266	19	24	50	12	25	314	8	17	86	52	79	144	76	142	873	7	56	298	40	75	165
TOTAL	209	400	2,853	643	1,371	3,101	188	218	274	434	710	3,770	130	232	1,080	665	828	1,249	1,652	2,941	10,245	158	597	1,989	606	925	1,475

Source: Claritas MarketPlace and EPS.

"demo1"

[1] Projections shown do not reflect current unemployment data.

[2] Daytime Population includes employees and those not in the labor force (older than 16 years of age).

Table C-2
Loomis Town Center Implementation Plan - Phase 1
Demographic Characteristics of Case Studies - Percentage Share (2009)

Item	Town of Loomis			City of Auburn			City of Winters			City of Nevada City			City of Sutter Creek			City of St. Helena			City of Santa Rosa			Town of Windsor			City of Healdsburg			
	<i>Horseshoe Bar Road & Taylor Road</i>			<i>Oakwood Drive & Lincoln Way</i>			<i>East Main Street & Railroad Avenue</i>			<i>Sacramento Street & Clark Street</i>			<i>Main Street & Eureka Street</i>			<i>Main Street & Hunt Avenue</i>			<i>Santa Rosa Plaza</i>			<i>McClelland Boulevard & DuVander Lane</i>			<i>Center Street & Matheson Street</i>			
	<i>1/2 Mile</i>	<i>1 Mile</i>	<i>5 Mile</i>	<i>1/2 Mile</i>	<i>1 Mile</i>	<i>5 Mile</i>	<i>1/2 Mile</i>	<i>1 Mile</i>	<i>5 Mile</i>	<i>1/2 Mile</i>	<i>1 Mile</i>	<i>5 Mile</i>	<i>1/2 Mile</i>	<i>1 Mile</i>	<i>5 Mile</i>	<i>1/2 Mile</i>	<i>1 Mile</i>	<i>5 Mile</i>	<i>1/2 Mile</i>	<i>1 Mile</i>	<i>5 Mile</i>	<i>1/2 Mile</i>	<i>1 Mile</i>	<i>5 Mile</i>	<i>1/2 Mile</i>	<i>1 Mile</i>	<i>5 Mile</i>	
Population (2009)	1,621	4,712	75,236	2,436	6,143	38,005	2,293	6,448	9,281	1,531	3,432	32,928	1,294	2,452	9,167	2,663	5,210	11,182	4,428	20,586	183,192	4,052	16,105	42,457	3,080	7,312	26,375	
Population by Age Group																												
Less than 18 y. o.	21%	20%	23%	16%	17%	18%	29%	30%	28%	14%	14%	18%	19%	19%	18%	23%	23%	21%	20%	22%	23%	28%	28%	26%	24%	23%	24%	
Age : 18-34	25%	25%	23%	28%	25%	23%	27%	26%	26%	23%	24%	23%	21%	21%	20%	21%	21%	23%	27%	27%	24%	22%	21%	22%	23%	23%	23%	
Age : 35-54	27%	27%	29%	29%	27%	25%	26%	27%	27%	29%	29%	25%	26%	25%	25%	27%	26%	27%	33%	30%	28%	29%	29%	28%	28%	26%	28%	
Age : 55-64	12%	12%	11%	12%	12%	13%	9%	9%	10%	17%	17%	15%	14%	14%	14%	13%	13%	14%	11%	11%	13%	10%	11%	12%	13%	13%	13%	
Age : 65-84	13%	13%	12%	12%	14%	17%	8%	7%	8%	13%	13%	15%	17%	18%	19%	12%	13%	12%	7%	8%	10%	9%	9%	10%	9%	11%	10%	
Age 85 and Over	3%	2%	2%	3%	5%	4%	1%	1%	1%	3%	3%	4%	3%	3%	5%	4%	4%	3%	1%	2%	2%	2%	2%	2%	2%	3%	2%	
TOTAL (2009 Population)	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Median Household Income	\$60,268	\$66,729	\$85,626	\$45,967	\$47,095	\$57,416	\$64,706	\$67,506	\$69,845	\$46,149	\$46,558	\$47,188	\$57,176	\$54,534	\$56,167	\$75,765	\$77,269	\$77,822	\$40,138	\$47,799	\$62,731	\$69,525	\$77,097	\$72,148	\$52,013	\$53,569	\$66,597	
Educational Attainment (25+)																												
High School Diploma	26%	24%	17%	25%	25%	26%	25%	23%	21%	20%	20%	27%	28%	27%	29%	18%	17%	16%	26%	22%	21%	24%	21%	20%	18%	19%	20%	
Bachelor's Degree	13%	14%	26%	15%	16%	17%	13%	12%	14%	20%	20%	16%	15%	15%	14%	29%	29%	27%	13%	14%	17%	13%	15%	18%	18%	18%	18%	
Advanced Degree	4%	5%	11%	4%	7%	8%	5%	6%	8%	15%	14%	9%	9%	9%	7%	11%	12%	15%	5%	7%	8%	5%	6%	9%	11%	9%	8%	
All Others (No HS, Some College, etc.)	57%	57%	47%	57%	53%	49%	57%	59%	57%	44%	46%	48%	48%	49%	50%	42%	43%	43%	55%	57%	54%	58%	58%	53%	53%	53%	54%	
Total (25+)	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Employment Status (16+)																												
Employment Rate	97.1%	97.4%	97.0%	95.8%	95.7%	95.7%	94.5%	93.1%	93.1%	94.4%	93.1%	95.3%	95.5%	94.9%	95.6%	95.8%	96.1%	96.9%	86.4%	92.4%	95.5%	94.8%	95.4%	96.2%	94.3%	94.3%	95.4%	
Unemployment Rate	2.9%	2.6%	3.0%	4.2%	4.3%	4.3%	5.5%	6.9%	6.9%	5.6%	6.9%	4.7%	4.5%	5.1%	4.4%	4.2%	3.9%	3.1%	13.6%	7.6%	4.5%	5.2%	4.6%	3.8%	5.7%	5.7%	4.6%	
Employees (2009)																												
Construction	22%	34%	15%	3%	6%	5%	7%	7%	9%	3%	3%	5%	1%	3%	3%	4%	4%	2%	2%	3%	6%	6%	8%	9%	3%	6%	6%	
Manufacturing	2%	6%	6%	6%	5%	13%	2%	1%	4%	5%	7%	8%	6%	7%	3%	34%	37%	33%	6%	4%	6%	1%	7%	14%	11%	12%	16%	
Retail	32%	14%	23%	25%	19%	17%	50%	46%	37%	28%	16%	23%	23%	18%	24%	27%	21%	14%	25%	19%	25%	27%	32%	18%	41%	33%	24%	
Finance	7%	4%	7%	7%	8%	5%	3%	3%	2%	9%	6%	8%	5%	6%	5%	6%	5%	3%	14%	11%	8%	8%	6%	4%	7%	6%	4%	
Service	24%	25%	38%	36%	42%	30%	28%	33%	28%	47%	36%	40%	61%	57%	50%	23%	23%	39%	38%	50%	38%	45%	35%	29%	28%	32%	33%	
Public Administration	6%	2%	2%	3%	7%	22%	4%	3%	2%	5%	29%	8%	2%	3%	9%	1%	1%	1%	9%	8%	9%	10%	3%	8%	5%	4%	2%	
Other	7%	15%	10%	19%	14%	8%	6%	7%	19%	3%	3%	8%	2%	4%	6%	6%	9%	7%	6%	6%	8%	4%	9%	17%	5%	7%	13%	
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Number of Businesses																												
Construction	11%	18%	13%	4%	11%	10%	12%	11%	11%	3%	4%	10%	4%	8%	7%	6%	6%	6%	3%	4%	9%	7%	14%	11%	3%	8%	9%	
Manufacturing	1%	5%	4%	3%	4%	5%	3%	3%	4%	3%	4%	6%	6%	6%	3%	17%	17%	20%	3%	3%	4%	1%	3%	8%	9%	8%	10%	
Retail	25%	18%	19%	24%	18%	18%	27%	26%	23%	25%	19%	18%	36%	24%	23%	19%	18%	15%	19%	18%	18%	25%	20%	16%	31%	24%	20%	
Finance	11%	9%	11%	10%	11%	10%	7%	7%	6%	7%	6%	9%	5%	7%	9%	10%	9%	7%	12%	11%	10%	13%	9%	9%	9%	8%	7%	
Service	39%	36%	41%	51%	46%	43%	35%	38%	34%	57%	56%	46%	39%	46%	42%	39%	40%	39%	54%	56%	49%	42%	42%	38%	38%	40%	41%	
Public Administration	2%	1%	1%	2%	3%	5%	6%	5%	4%	2%	8%	3%	3%	3%	8%	1%	1%	1%	4%	3%	2%	8%	3%	2%	4%	3%	2%	
Other	9%	14%	11%	6%	8%	9%	10%	11%	18%	3%	4%	8%	6%	7%	8%	8%	10%	12%	5%	5%	9%	4%	9%	15%	7%	8%	11%	
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

"demo2"

Source: Claritas MarketPlace and EPS.

[1] Daytime Population includes employees and those not in the labor force (older than 16 years of age).

Table C-3
Loomis Town Center Implementation Plan - Phase 1
Physical and Other Characteristics of Case Studies

Item	Town of Loomis		City of Auburn		City of Healdsburg		City of Nevada City		City of Sutter Creek		City of St. Helena	
Demographic Characteristics												
Population (1-mile)	4,712		6,143		7,312		3,432		2,452		5,210	
Median Household Income (1-mile)	\$66,729		\$47,095		\$53,569		\$46,558		\$54,534		\$77,269	
Unemployment Rate	2.6%		4.3%		5.7%		6.9%		5.1%		3.9%	
Employment												
Retail	568	14.4%	2,066	18.7%	2,013	32.7%	875	16.4%	267	18.4%	1,625	21.2%
Service	987	25.0%	4,626	41.8%	1,958	31.9%	1,932	36.2%	830	57.2%	1,733	22.6%
All Others	2,393	60.6%	4,378	39.5%	2,176	35.4%	2,531	47.4%	354	24.4%	4,301	56.2%
TOTAL	3,948	100.0%	11,070	100.0%	6,147	100.0%	5,338	100.0%	1,451	100.0%	7,659	100.0%
Physical Characteristics												
Configuration	Linear Less Than 1/2 Mile		Downtown includes two main districts, Several sq. blocks		Several small sq. blocks		Linear		Linear		4-block street	
Relative Traffic Volumes	Low		Medium		Medium/High		Medium		Medium		High	
Roadway/Major Highway Access	Approx. 1/2 mile from Interstate 80		Intersection of Interstate 80 and Hwy 49		Easy Access to Hwy 101		Easy access to Hwy 49		Easy access to CA-49		Easy access to CA-29	
Transit or Rail Service	Commuter Bus Service (Colfax to Roseville)		Amtrak - Capitol Corridor Commuter Bus Service (Colfax to Roseville)		Sonoma County and Healdsburg Public Transit Bus System				Amador Rapid Transit		Napa Valley Wine Train, St. Helena Shuttle	
Parking	On-street, off-street (private and public lots)		Plentiful on- and off-street (private and public lots)		On-street, off-street (private and public lots)		On-street metered, limited off-street (private), limited off-site (public)		On-street, off-street (private and public lots)		On-street 3 hour limit downtown, plentiful on-street, off-street	
Other Characteristics												
General Downtown Theme(s)	Antique/specialty shopping		Main Street USA Historic district Antique/specialty shopping		Agritourism district Art & entertainment district		Historic district Main Street USA Art & entertainment district Antique/specialty shopping		Historic district Art & entertainment district Agritourism district Antique/specialty shopping		Agritourism district Art & entertainment district	
Business District or Organization	Loomis Basin Chamber of Commerce		Auburn Chamber of Commerce		Healdsburg Chamber of Commerce and Visitors Bureau		Nevada City Chamber of Commerce		Active - Sutter Creek Business & Professional Association		St. Helena Chamber of Commerce	
Downtown in Redevelop. Project Area	No		Yes		Yes		No		No		No	
Civic Amenities	Depot building, park and ride lot		Street beautification program, streetscape improvements (landscape/tree plantings, sidewalks, decorative paving, etc.), info. kiosks, development of oak preserve park		Reconstructed a 1.0 acre park, streetscape improvements incl. surface, sidewalks, landscaping, drainage improvements		Funded by community groups: historical displays, monuments, and public spaces; public restrooms and parking; street beautification		Street beautification efforts (landscaping and painting)		Street beautification efforts (landscaping and painting)	
Lodging Options	None		Adequate lodging available		Lodging available to accommodate tourism				Several bed and breakfasts and other tourism-oriented lodging available		Lodging available to accommodate tourism	
Primary Market Served	Local and Loomis Basin		Community and Tourist - historical district adjacent to vibrant downtown.		Highly-tourism-oriented		Historic Downtown, Highly tourism-oriented		Historic Downtown, Highly tourism-oriented		Historic Downtown, Highly tourism-oriented	
Types of Stores	Banks, nursery, farmers market/produce stand, franchise quick service restaurant, neighborhood-serving retail		Full complement of community-serving retail, banks, gas stations, bookstores, restaurants, services		Wine stores, restaurants, boutiques, art galleries, community-serving retail, cafes, specialty stores, hotels		Hotels, saloons, bistros, boutiques, art galleries, goldsmith /jewelry		Hotels, saloons, bistros, boutiques, art galleries		Wine stores, restaurants, boutiques, art galleries, restaurants, specialty stores, banks, spas, hotels, retail stores	
Unique Attributes	Adjacent to elementary school, near high school, historic community center		Courthouse		Surrounded by over 60 Wineries, Healdsburg Museum, River Rock Casino		Nevada City Theater, Entire downtown district is a national historic landmark				Silverado Museum The White Barn (performing arts theater)	
Other Comments			Distinct Historic Area (Gold Rush-era)				Distinct Historic Area (Gold Rush-era)		Near cave exploration and wine tasting opportunities		Central to Napa Valley, Elmshaven National Landmark Historic	

Table C-3
Loomis Town Center Implementation Plan - Phase 1
Physical and Other Characteristics of Case Studies

Item	Town of Loomis		City of Santa Rosa		Town of Windsor		City of Winters		City of Berkeley (4th St)
Demographic Characteristics									
Population (1-mile)	4,712		20,586		16,105		6,448		n/a
Median Household Income (1-mile)	\$66,729		\$47,799		\$77,097		\$67,506		n/a
Unemployment Rate	2.6%		7.6%		4.6%		6.9%		n/a
Employment									
Retail	568	14.4%	4,607	18.5%	1,369	32.1%	949	44.5%	n/a
Service	987	25.0%	12,323	49.6%	1,512	35.5%	708	33.2%	n/a
All Others	2,393	60.6%	7,913	31.9%	1,384	32.5%	476	22.3%	n/a
TOTAL	3,948	100.0%	24,843	100.0%	4,265	100.0%	2,133	100.0%	n/a
Physical Characteristics									
Configuration	Linear Less Than 1/2 Mile		Downtown comprises three main districts, Several sq. blocks		Several small sq. blocks		Several small sq. blocks		16 square blocks area
Relative Traffic Volumes	Low		High		Medium		Low		High
Roadway/Major Highway Access	Approx. 1/2 mile from Interstate 80		Easy access to Hwy 101 & 12		Adjacent to Hwy 101				Easy Access to I-80 and I-580 from University Ave.
Transit or Rail Service	Commuter Bus Service (Colfax to Roseville)		Santa Rosa City bus, Greyhound, Sonoma County Transit, Amtrack		Sonoma County Public Transit Bus System		YoloBus - Yolo County Transportation District		Amtrak - Capitol Corridor Commuter Bus Service (Colfax to Roseville)
Parking	On-street, off-street (private and public lots)		On-street metered, Plentiful on-street, off-street (private and public lots)		Plentiful on-street, off-street (private and public lots)				On-street, off-street (one Free lot and Spenger's Parking lot)
Other Characteristics									
General Downtown Theme(s)	Antique/specialty shopping		Agritourism district Art & entertainment district		Agritourism district Art & entertainment district Antique/specialty shopping		Main Street USA		Antique/specialty shopping Home Décor/Improvement
Business District or Organization	Loomis Basin Chamber of Commerce		Santa Rosa Chamber of Commerce		Windsor Chamber of Commerce & Visitors Center		Winters Chamber of Commerce		Berkeley Convention & Visitors Bureau
Downtown in Redevelop. Project Area	No		Yes		Yes		Yes		Yes
Civic Amenities	Depot building, park and ride lot		Revitalization and streetscape improvements of several squares, construction of parking garages and lots, utilities improvements, pedestrian and bikeway improvements		A 4.5 acre Town Green w/ bandstand, fountain, pools, historical timeline walk, and children's play area		Streetscape improvements (sidewalks, landscaping, furnishings, streetlights, etc.). Add'l pedestrian, signage, and façade improvements		Transit improvements including rail station landscaping, furniture, lighting and artwork; bikeway bridge. Streetscape improvements, new signage
Lodging Options	None		Lodging available to accommodate tourism		Lodging available to accommodate tourism		None		None
Primary Market Served	Local and Loomis Basin		Historic Downtown, Highly tourism-oriented		Historic Downtown, Highly tourism-oriented		Historic Downtown, local community serving		Community and Tourism
Types of Stores	Banks, nursery, farmers market/produce stand, franchise quick service restaurant, neighborhood-serving retail		Full complement of community-serving and regional retail, wine shops, boutiques, art galleries, restaurants, specialty stores		Wine stores, restaurants, specialty cuisine, gift shops, restaurants, community-serving retail, antique stores, banks, spas, hotels		Neighborhood-serving retail		Full complement of community-serving. retail, cafes, specialty stores, bookstores, restaurants, services
Unique Attributes	Adjacent to elementary school, near high school, historic community center		Charles M. Schulz Museum, Sonoma County Museum		Windsor Water Works and Slides		Palms music venue		Previously an Industrial area
Other Comments									Project includes over 130 businesses

"demo3"



APPENDIX D:
Downtown Business Owner and
Stakeholder Interviews

DOWNTOWN BUSINESS OWNER AND STAKEHOLDER INTERVIEWS

EPS conducted several downtown business owner and stakeholder interviews for this study. Information derived from these interviews was used to assess the Town's overall market opportunities and constraints. Below is a list of persons contacted:

- Matt Williams, Owner, Café Zorro
- Randy Roe, US Bank
- Scott Paris, High-Hand Conservatory, Nursery, and Art Gallery
- Peter Oaks, Business Owner, "I Love Loomis" co-creator
- Bill Thomas, Property Owner
- Business Owner, Chiropractor (near Pizza Factory)
- Julie, Owner, G'day Donuts
- Jim, Loomis Barber Shop
- Tate, Owner, Black Bear Outfitters
- Tony Bosserman, Owner, Flooring America
- Charlotte Reynolds, Owner, Wild Chicken
- Jenine Windeshausen, Loomis Basin Resident