Evergreen Area Retail Study
APPENDICES AND MAPS

Prepared for:
Office of Economic Development
and
Planning Department
City of San José

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Bay Area Economics (BAE)

September 13, 2005

Appendix Tables & Maps

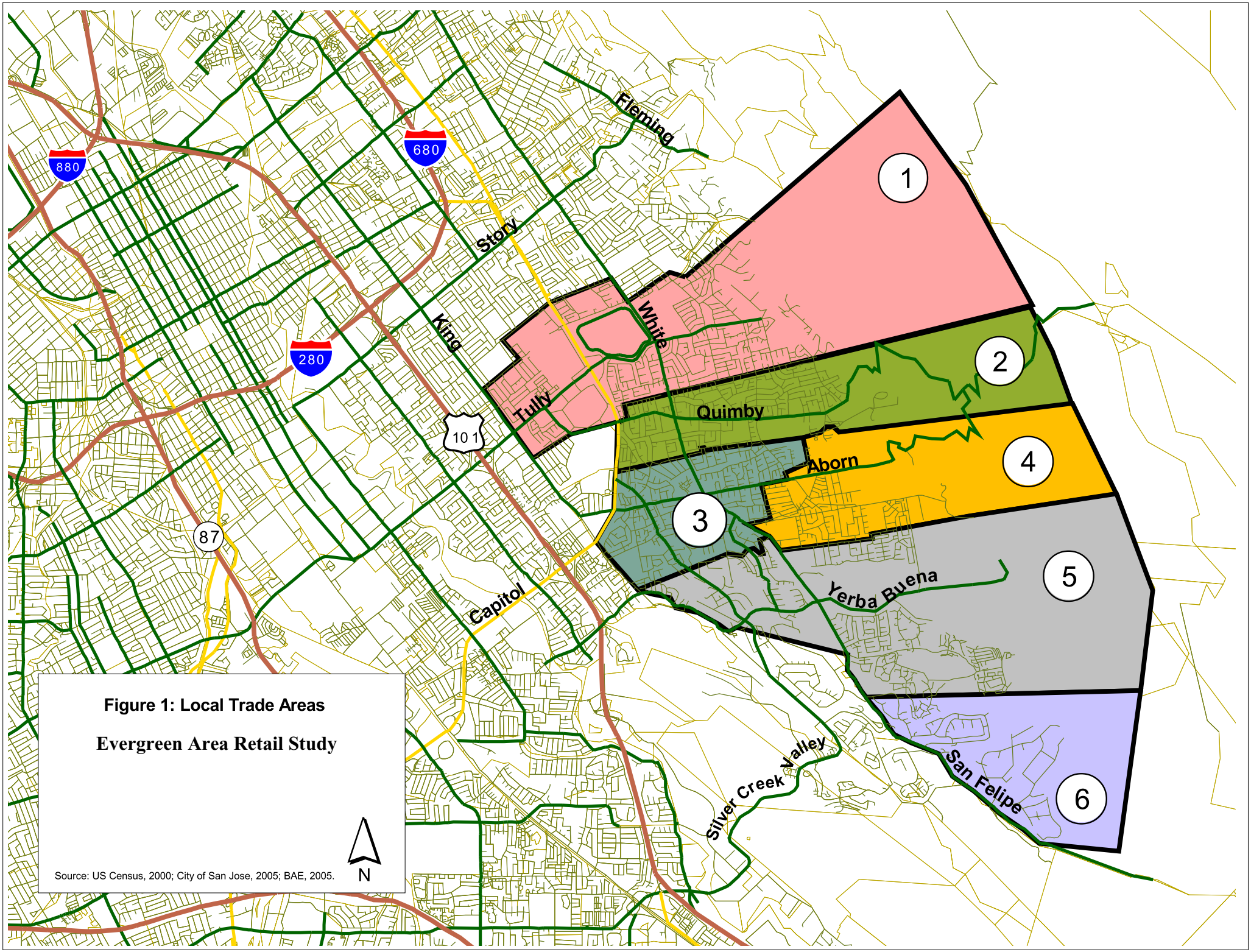
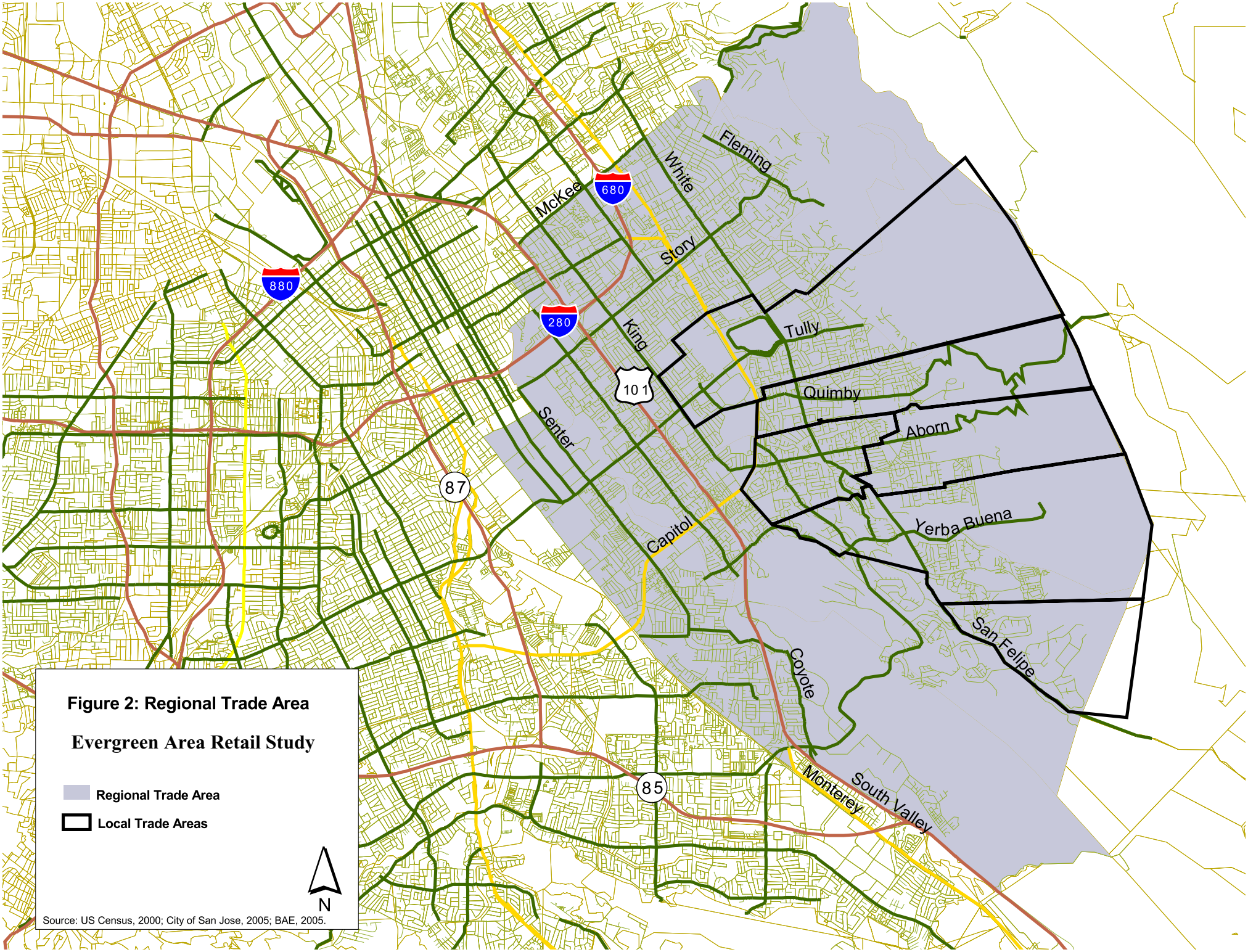
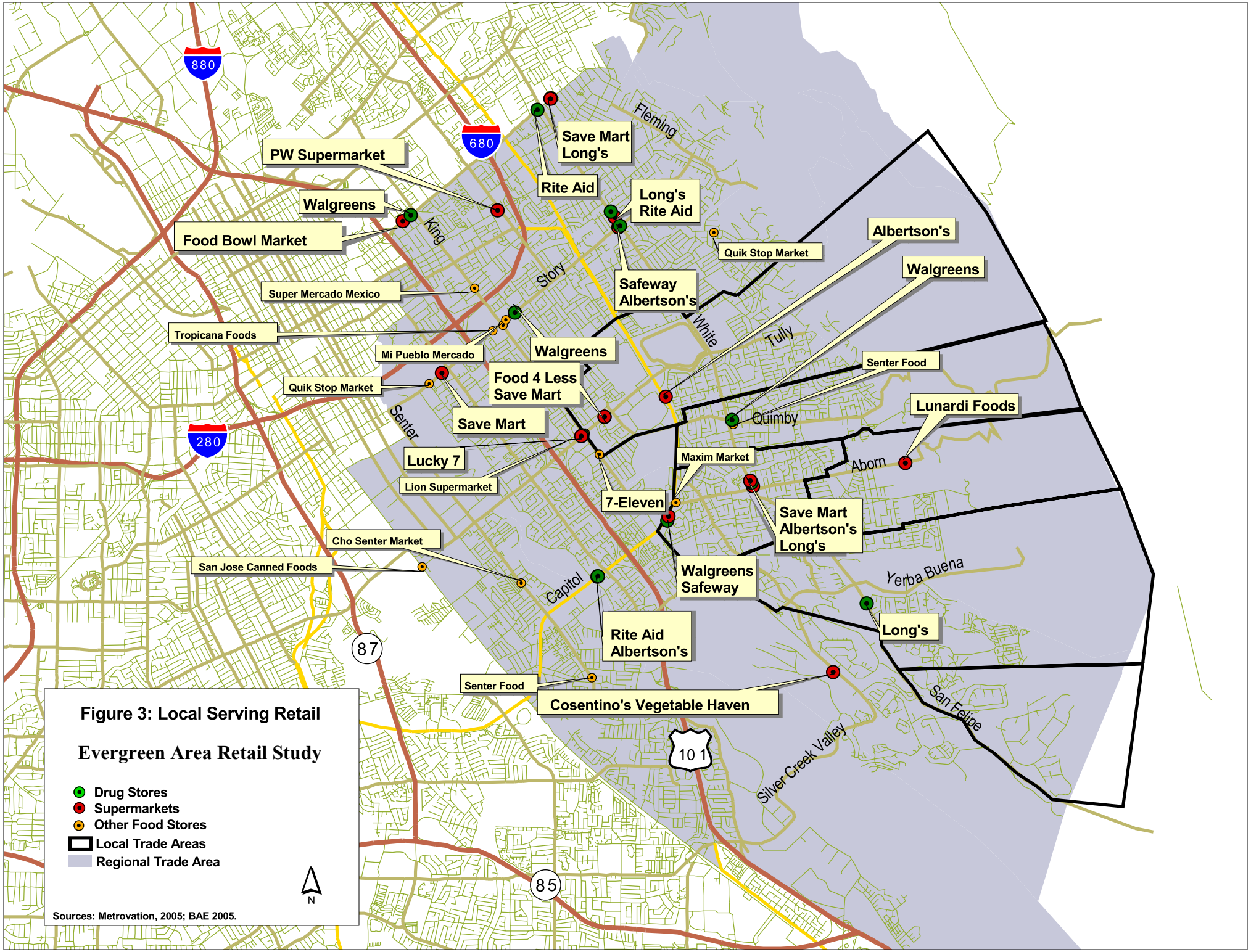
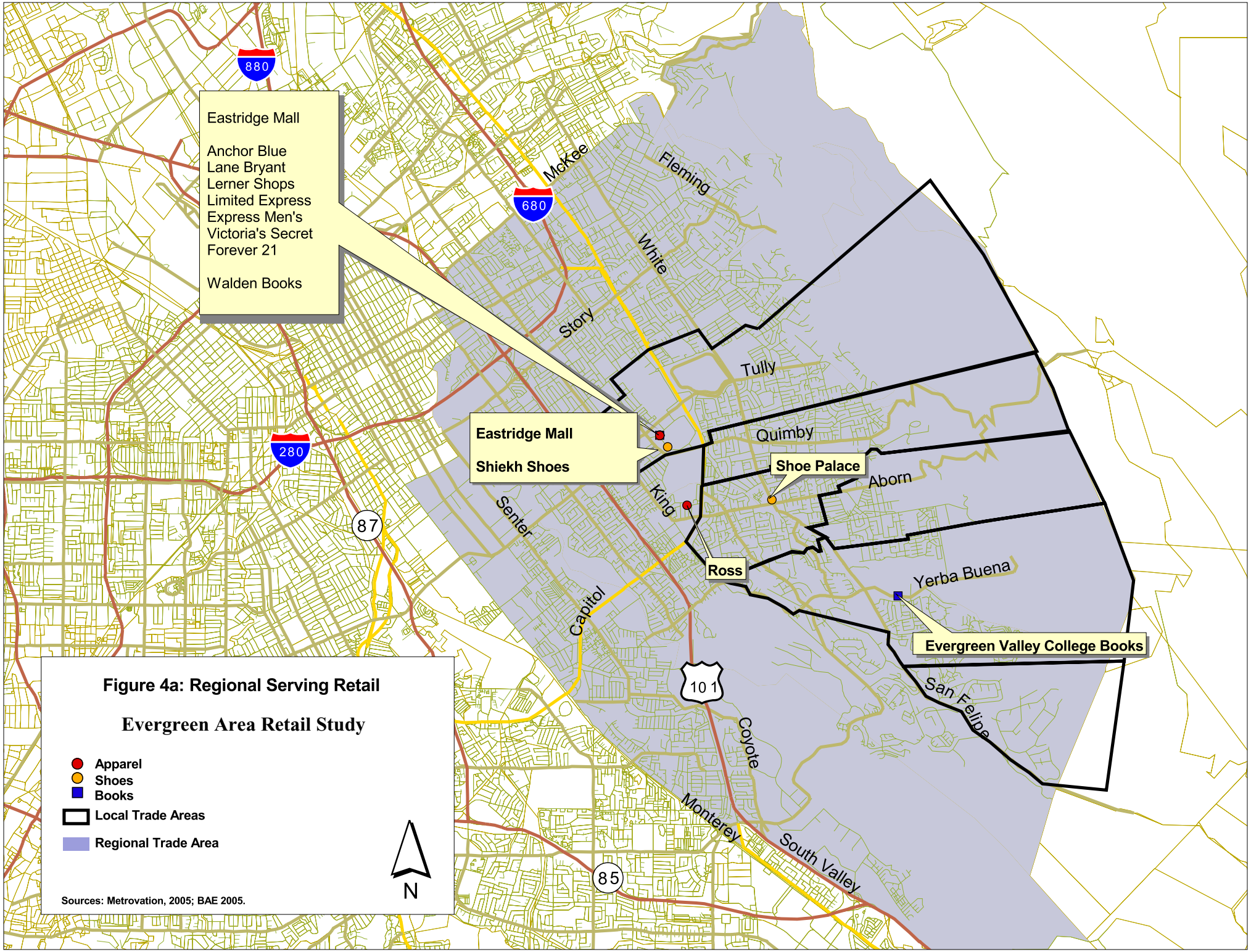


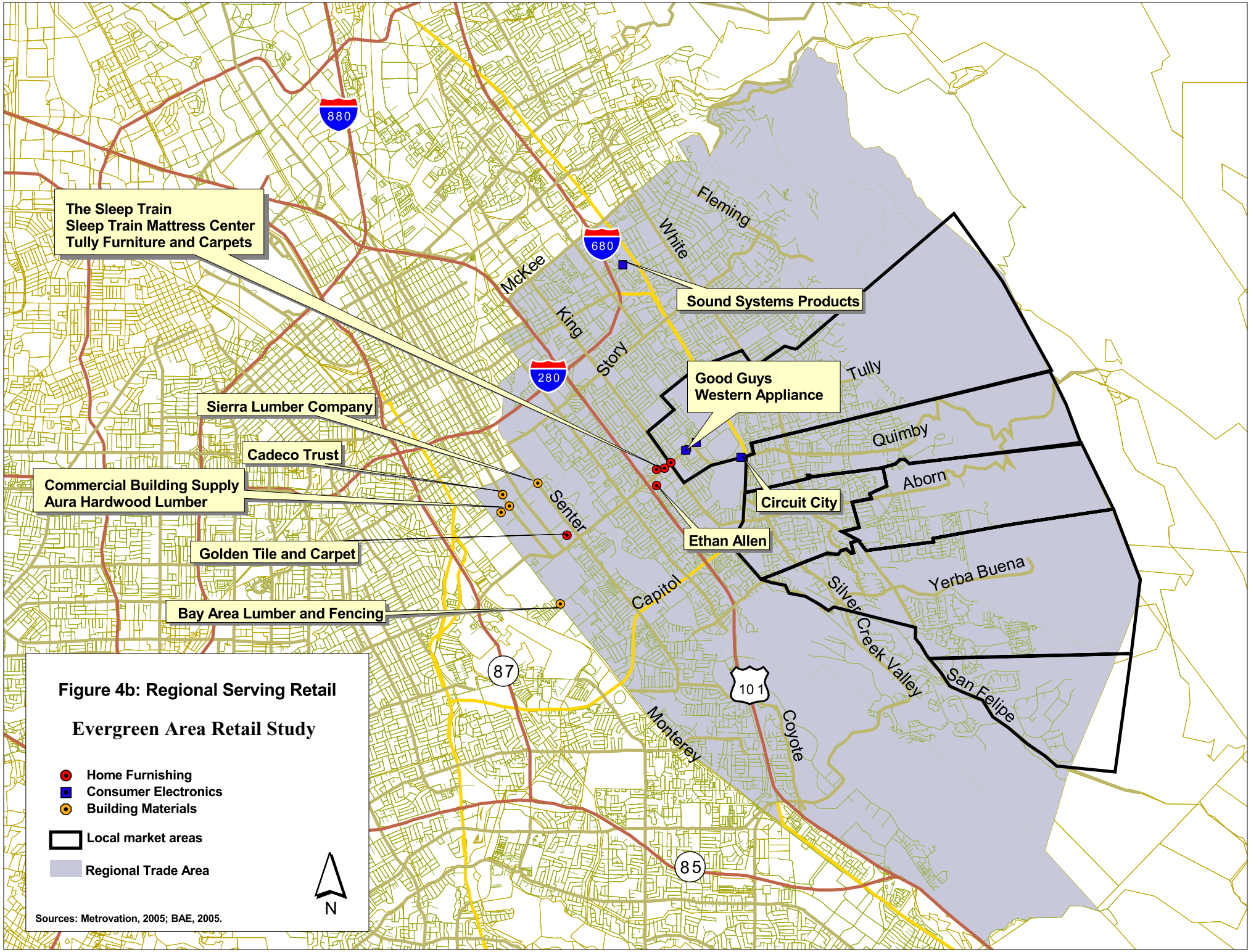
Figure 1: Local Trade Areas

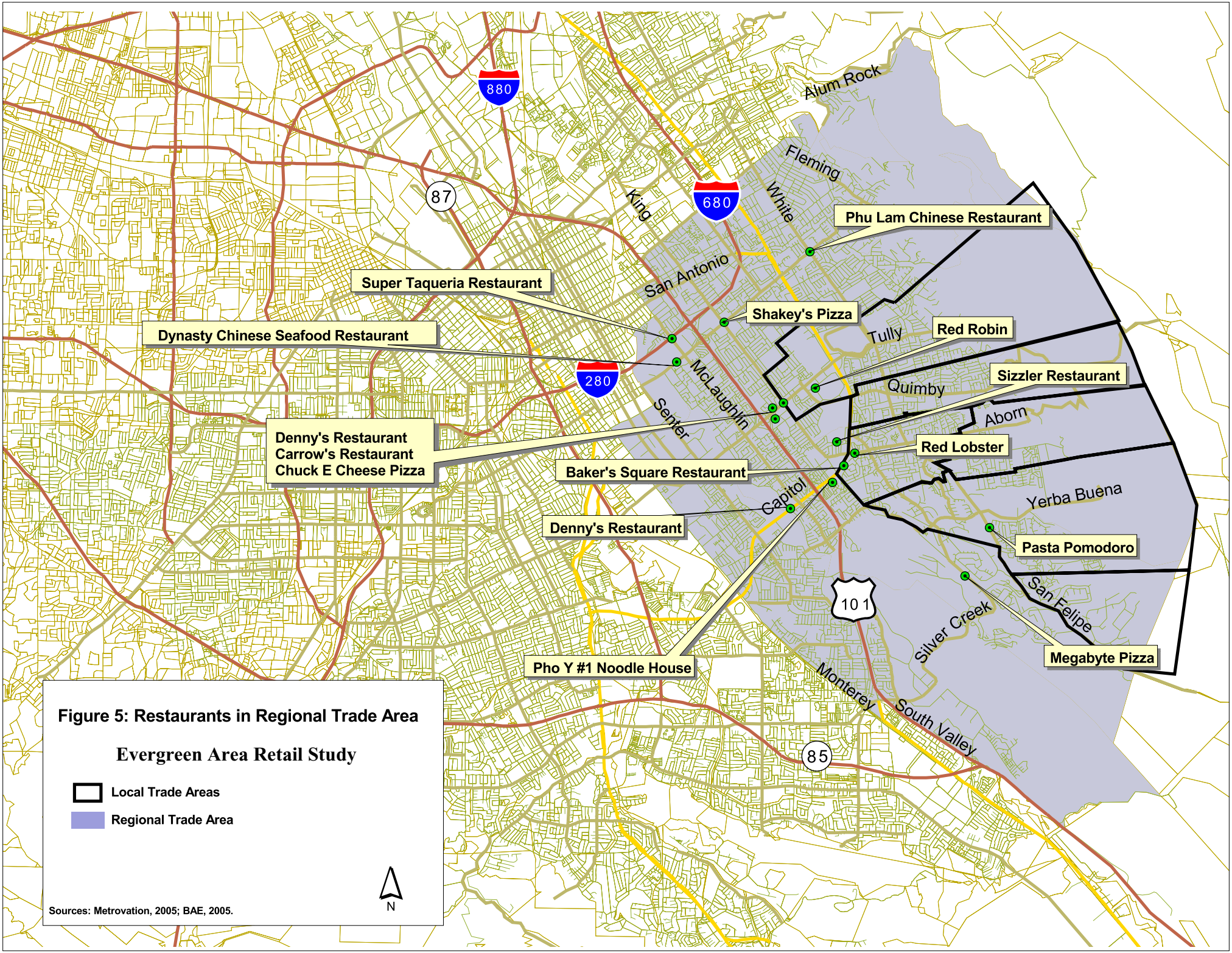
Evergreen Area Retail Study


Fleming
White
McKee
680
Story
880
280
King
Tully
101
Quimby
Senter
Aborn
87
Capitol
Yerba Buena
San Felipe
Coyote
Monterey
South Valley
85
Figure 2: Regional Trade Area
Evergreen Area Retail Study
Regional Trade Area
Local Trade Areas
N
Source: US Census, 2000; City of San Jose, 2005; BAE, 2005.


880
680
280
87
85
101
PW Supermarket
Walgreens
Food Bowl Market
Super Mercado Mexico
Tropicana Foods
Mi Pueblo Mercado
Quik Stop Market
Lucky 7
Lion Supermarket
Cho Senter Market
San Jose Canned Foods
Save Mart
Long's
Rite Aid
Long's
Rite Aid
Safeway
Albertson's
Quik Stop Market
Albertson's
Walgreens
Walgreens
Food 4 Less
Save Mart
Senter Food
Lunardi Foods
Maxim Market
7-Eleven
Save Mart
Albertson's
Long's
Walgreens
Safeway
Long's
Rite Aid
Albertson's
Senter Food
Cosentino's Vegetable Haven
Fleming
King
Story
White
Tully
Quimby
Aborn
Senter
Capitol
Yerba Buena
San Felipe
Silver Creek Valley
Figure 3: Local Serving Retail
Evergreen Area Retail Study
Drug Stores
Supermarkets
Other Food Stores
Local Trade Areas
Regional Trade Area
N
Sources: Metrovation, 2005; BAE 2005.


Eastridge Mall
Anchor Blue
Lane Bryant
Lerner Shops
Limited Express
Express Men's
Victoria's Secret
Forever 21
Walden Books
Eastridge Mall
Shiekh Shoes
Shoe Palace
Ross
Evergreen Valley College Books
880
680
280
87
101
85
McKee
Fleming
White
Story
Tully
Quimby
Aborn
King
Senter
Capitol
Yerba Buena
San Felipe
Coyote
Monterey
South Valley
Figure 4a: Regional Serving Retail
Evergreen Area Retail Study
Apparel
Shoes
Books
Local Trade Areas
Regional Trade Area
N
Sources: Metrovation, 2005; BAE 2005.


The Sleep Train
Sleep Train Mattress Center
Tully Furniture and Carpets
Sierra Lumber Company
Cadeco Trust
Commercial Building Supply
Aura Hardwood Lumber
Golden Tile and Carpet
Bay Area Lumber and Fencing
Sound Systems Products
Good Guys
Western Appliance
Circuit City
Ethan Allen
880
680
280
87
101
85
Fleming
White
McKee
King
Story
Senter
Capitol
Monterey
Coyote
Tully
Quimby
Aborn
Yerba Buena
Silver Creek Valley
San Felipe
Figure 4b: Regional Serving Retail
Evergreen Area Retail Study
Home Furnishing
Consumer Electronics
Building Materials
Local market areas
Regional Trade Area
N
Sources: Metrovation, 2005; BAE, 2005.


880
87
680
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101
85
Alum Rock
Fleming
White
King
San Antonio
Tully
Quimby
Aborn
McLaughlin
Senter
Capitol
Yerba Buena
San Felipe
Silver Creek
Monterey
South Valley
Phu Lam Chinese Restaurant
Super Taqueria Restaurant
Shakey's Pizza
Dynasty Chinese Seafood Restaurant
Red Robin
Sizzler Restaurant
Denny's Restaurant
Carrow's Restaurant
Chuck E Cheese Pizza
Red Lobster
Baker's Square Restaurant
Denny's Restaurant
Pasta Pomodoro
Megabyte Pizza
Pho Y #1 Noodle House
Figure 5: Restaurants in Regional Trade Area
Evergreen Area Retail Study
Local Trade Areas
Regional Trade Area
N
Sources: Metrovation, 2005; BAE, 2005.

Appendix Table 1: Taxable Sales Trends in San José and California, 1997 to 2003 (a)

All figures in $1,000s, and adjusted for inflation to 2003 dollars.

Retail Sales Category	1997 (b)	1998	1999	2000	2001	2002	2003	% Change '97-'03	Annual Avg. % Change
San José									
Apparel stores	$297,214	$295,755	$305,883	$340,550	$347,116	$352,730	$372,107	25.2%	3.8%
General merchandise stores	$1,197,651	$1,249,118	$1,293,162	$1,360,229	$1,261,315	$1,173,559	$1,145,069	-4.4%	-0.7%
Food stores	$396,572	$406,034	$419,099	$436,530	$434,251	$416,139	$397,685	0.3%	0.0%
Eating and drinking places	$811,595	$842,659	$880,701	$954,399	$931,254	$888,930	$898,859	10.8%	1.7%
Home furnishings and appliances	$349,151	$372,147	$407,496	$452,965	$391,229	$359,700	$336,072	-3.7%	-0.6%
Bldg. matrl. and farm implements	$582,482	$657,747	$686,735	$779,007	$754,778	$749,830	$737,588	26.6%	4.0%
Auto dealers and auto supplies	$1,395,488	$1,505,336	$1,652,791	$1,902,785	$1,644,104	$1,475,451	$1,463,891	4.9%	0.8%
Service stations	$539,485	$492,953	$663,936	$836,793	$792,835	$669,135	$744,517	38.0%	5.5%
Other retail stores	$1,409,720	$1,519,435	$1,754,784	$2,009,569	$1,680,172	$1,442,547	$1,362,282	-3.4%	-0.6%
Retail Stores Totals	**$6,979,358**	**$7,341,184**	**$8,064,586**	**$9,072,827**	**$8,237,055**	**$7,528,022**	**$7,458,070**	6.9%	1.1%
All Other Outlets	**$4,010,255**	**$4,157,643**	**$4,429,506**	**$5,477,085**	**$4,599,572**	**$3,404,750**	**$3,373,127**	-15.9%	-2.8%
Totals All Outlets	**$10,989,613**	**$11,498,827**	**$12,494,093**	**$14,549,912**	**$12,836,627**	**$10,932,771**	**$10,831,197**	-1.4%	-0.2%
CALIFORNIA									
Apparel stores	$13,213,807	$13,244,042	$12,649,939	$13,733,841	$13,910,593	$14,351,872	$15,179,710	14.9%	2.3%
General merchandise stores	$41,858,618	$43,779,688	$46,972,867	$48,991,590	$49,031,466	$49,602,089	$50,550,818	20.8%	3.2%
Food stores	$18,249,232	$18,192,822	$18,964,388	$19,642,231	$19,557,707	$19,387,294	$19,407,823	6.3%	1.0%
Eating and drinking places	$32,378,910	$33,921,966	$35,832,093	$37,908,590	$38,286,312	$38,955,666	$40,049,699	23.7%	3.6%
Home furnishings and appliances	$11,039,301	$11,894,084	$13,222,423	$14,530,814	$13,852,130	$14,304,903	$15,104,217	36.8%	5.4%
Bldg. matrl. and farm implements	$20,164,892	$21,860,991	$24,567,164	$26,516,880	$27,493,236	$28,719,960	$30,693,755	52.2%	7.3%
Auto dealers and auto supplies	$43,572,022	$47,871,412	$54,162,934	$60,642,248	$63,146,103	$65,289,032	$67,052,141	53.9%	7.4%
Service stations	$22,138,513	$19,588,377	$22,429,921	$26,948,666	$25,585,416	$24,478,703	$27,714,635	25.2%	3.8%
Other retail stores	$46,351,688	$48,646,522	$53,368,953	$57,960,508	$54,557,864	$53,459,870	$54,464,256	17.5%	2.7%
Retail Stores Totals	**$248,966,984**	**$258,999,904**	**$282,170,682**	**$306,875,368**	**$305,420,825**	**$308,549,389**	**$320,217,054**	28.6%	4.3%
All Other Outlets	**$141,924,029**	**$146,151,205**	**$153,618,132**	**$165,466,998**	**$153,315,920**	**$142,542,557**	**$139,879,414**	-1.4%	-0.2%
Totals All Outlets	**$390,891,013**	**$405,151,109**	**$435,788,814**	**$472,342,366**	**$458,736,745**	**$451,091,946**	**$460,096,468**	17.7%	2.8%

Notes:

(a) In thousands of dollars

(b) All figures are inflated to 2003$ using the San Francisco-Oakland-San Jose CPI for all Urban Consumers.

Sources: MBIA; State Board of Equalization; BAE, 2005.

Appendix Table 2: Per Capita Taxable Sales Trends in San José and California, 1997 to 2003

All figures adjusted for inflation to 2003 dollars.

Retail Sales Category	1997 (a) (b)	1998	1999	2000	2001	2002	2003	% Change '97-'03	Annual Avg. % Change
San José									
Apparel stores	$413	$392	$383	$402	$383	$385	$405	-2.0%	-0.3%
General merchandise stores	$1,664	$1,654	$1,620	$1,605	$1,391	$1,281	$1,245	-25.2%	-4.7%
Food stores	$551	$537	$525	$515	$479	$454	$432	-21.5%	-4.0%
Eating and drinking places	$1,128	$1,115	$1,103	$1,126	$1,027	$970	$977	-13.3%	-2.4%
Home furnishings and appliances	$485	$493	$510	$534	$432	$393	$365	-24.7%	-4.6%
Bldg. matrl. and farm implements	$809	$871	$860	$919	$833	$818	$802	-0.9%	-0.1%
Auto dealers and auto supplies	$1,939	$1,993	$2,070	$2,245	$1,813	$1,610	$1,592	-17.9%	-3.2%
Service stations	$750	$653	$832	$987	$875	$730	$810	8.0%	1.3%
Other retail stores	$1,959	$2,011	$2,198	$2,371	$1,853	$1,574	$1,481	-24.4%	-4.5%
Retail Stores Totals	**$8,462**	**$8,608**	**$9,151**	**$10,012**	**$8,745**	**$8,031**	**$8,111**	**-4.2%**	**-0.7%**
All Other Outlets	**$5,572**	**$5,504**	**$5,549**	**$6,461**	**$5,073**	**$3,716**	**$3,668**	**-34.2%**	**-6.7%**
Totals All Outlets	**$15,269**	**$15,222**	**$15,651**	**$17,165**	**$14,159**	**$11,931**	**$11,779**	**-22.9%**	**-4.2%**
CALIFORNIA									
Apparel stores	$486	$465	$420	$429	$405	$409	$426	-12.2%	-2.2%
General merchandise stores	$1,539	$1,538	$1,560	$1,530	$1,427	$1,415	$1,419	-7.7%	-1.3%
Food stores	$671	$639	$630	$613	$569	$553	$545	-18.8%	-3.4%
Eating and drinking places	$1,190	$1,192	$1,190	$1,184	$1,114	$1,111	$1,125	-5.5%	-0.9%
Home furnishings and appliances	$406	$418	$439	$454	$403	$408	$424	4.5%	0.7%
Bldg. matrl. and farm implements	$741	$768	$816	$828	$800	$819	$862	16.3%	2.5%
Auto dealers and auto supplies	$1,602	$1,682	$1,799	$1,893	$1,837	$1,863	$1,883	17.6%	2.7%
Service stations	$814	$688	$745	$841	$744	$698	$778	-4.4%	-0.7%
Other retail stores	$1,704	$1,709	$1,773	$1,810	$1,588	$1,525	$1,529	-10.2%	-1.8%
Retail Stores Totals	**$9,152**	**$9,100**	**$9,373**	**$9,581**	**$8,887**	**$8,803**	**$8,992**	**-1.7%**	**-0.3%**
All Other Outlets	**$5,217**	**$5,135**	**$5,103**	**$5,166**	**$4,461**	**$4,067**	**$3,928**	**-24.7%**	**-4.6%**
Totals All Outlets	**$14,369**	**$14,235**	**$14,476**	**$14,747**	**$13,348**	**$12,870**	**$12,920**	**-10.1%**	**-1.8%**

Notes:

(a) All figures are inflated to 2003$ using the San Francisco-Oakland-San Jose CPI for all Urban Consumers.

(b) Population figures:	1997	1998	1999	2000	2001	2002	2003
San José	852,100	866,800	878,800	893,300	906,600	916,328	919,555
California	32,207,000	32,657,000	33,140,000	33,753,000	34,367,000	35,048,666	35,612,116

Sources: State Board of Equalization; CA Department of Finance; BAE, 2005.

Appendix Table 3: San José Leakage Analysis by Retail Sector, 2003

Outlets	Santa Clara & San Mateo Counties (a)	Santa Clara County (a)	San José (a)	Per Capita Santa Clara & San Mateo Sales (a)	Per Capita Santa Clara Sales (a)	Per Capita San José Sales (a)	San José Injection/ (Leakage)
Apparel:							
Women's apparel	$356,482	$276,276	$98,955	$147	$161	$108	-27%
Men's apparel	$82,748	$65,271	$34,250	$34	$38	$37	9%
Family apparel	$631,001	$457,437	$248,084	$260	$266	$270	4%
Shoes	$171,976	$130,515	$69,825	$71	$76	$76	7%
Subtotal	***$1,242,207***	***$929,499***	***$451,113***	***$511***	***$541***	***$491***	***-4%***
General Merchandise:							
General merchandise stores	$3,285,182	$2,250,674	$887,882	$1,353	$1,309	$966	-29%
Drug stores	$511,718	$338,650	$151,154	$211	$197	$164	-22%
Subtotal	***$3,796,900***	***$2,589,324***	***$1,039,036***	***$1,563***	***$1,506***	***$1,130***	***-28%***
Specialty Stores:							
Gifts, art goods, and novelties	$137,540	$89,165	$42,521	$57	$52	$46	-18%
Sporting goods	$309,273	$214,784	$86,618	$127	$125	$94	-26%
Florists	$75,531	$49,584	$10,394	$31	$29	$11	-64%
Photo equip. and musical instruments	$181,504	$146,093	$48,795	$75	$85	$53	-29%
Stationery and books	$284,224	$209,847	$72,943	$117	$122	$79	-32%
Jewelry	$228,383	$179,461	$84,549	$94	$104	$92	-2%
Office, store and school supplies	$1,528,219	$1,163,307	$308,634	$629	$677	$336	-47%
Other specialties	$1,254,269	$856,358	$458,294	$516	$498	$498	-3%
Subtotal	***$3,998,943***	***$2,908,599***	***$1,112,747***	***$1,646***	***$1,692***	***$1,210***	***-27%***
Food Stores:							
Food stores selling all types of liquors	$887,242	$586,192	$268,113	$365	$341	$292	-20%
All other food stores	$332,461	$233,735	$146,425	$137	$136	$159	16%
Subtotal	***$1,219,703***	***$819,927***	***$414,539***	***$502***	***$477***	***$451***	***-10%***
Eating and drinking:							
Eating places: no alcoholic beverages	$1,076,965	$759,945	$368,203	$443	$442	$400	-10%
Eating places: beer and wine	$1,030,075	$757,771	$306,695	$424	$441	$334	-21%
Eating and drinking: all types of liquor	$983,920	$621,612	$220,596	$405	$361	$240	-41%
Subtotal	***$3,090,960***	***$2,139,328***	***$895,494***	***$1,273***	***$1,244***	***$974***	***-23%***
Household/Home Furnishings:							
Household and home furnishings	$860,682	$554,000	$132,873	$354	$322	$144	-59%
Household appliance dealers	$375,514	$244,640	$267,992	$155	$142	$291	88%
Subtotal	***$1,236,196***	***$798,640***	***$400,865***	***$509***	***$464***	***$436***	***-14%***
Building Materials:							
Lumber and building materials	$1,541,993	$929,024	$443,368	$635	$540	$482	-24%
Hardware stores	$291,558	$205,604	$99,975	$120	$120	$109	-9%
Paint, glass, wallpaper, plumbing & elec. Supplies	$278,511	$180,053	$37,730	$115	$105	$41	-64%
Subtotal	***$2,112,062***	***$1,314,681***	***$581,073***	***$870***	***$765***	***$632***	***-27%***
Automotive:							
New motor vehicle dealers	$4,267,200	$2,760,775	$1,226,651	$1,757	$1,606	$1,334	-24%
Used motor vehicle dealers	$237,988	$163,552	$68,974	$98	$95	$75	-23%
Automotive supplies and parts	$303,212	$218,821	$149,361	$125	$127	$162	30%
Service stations	$2,068,711	$1,413,227	$767,478	$852	$822	$835	-2%
Subtotal	***$6,877,111***	***$4,556,375***	***$2,212,464***	***$2,832***	***$2,650***	***$2,406***	***-15%***
Other Retail:							
Packaged liquor stores	$192,591	$123,713	$51,219	$79	$72	$56	-30%
Second-hand merchandise	$36,338	$15,591	$10,189	$15	$9	$11	-26%
Farm Implements (b)	$60,422	$51,219	$31,428	$25	$30	$34	37%
Farm & Garden	$142,259	$87,671	$20,094	$59	$51	$22	-63%
Fuel&ice, mobile home, trailer, camper, boat,	$210,938	$180,527	$8,715	$87	$105	$9	-89%
Subtotal	***$642,548***	***$458,721***	***$121,646***	***$265***	***$267***	***$132***	***-50%***
Retail Stores Total	**$24,216,630**	**$16,515,094**	**$7,228,977**	**$9,971**	**$9,604**	**$7,861**	**-21%**

Notes:
(a) Santa Clara County population, 2003: 1,719,537
San Mateo County population, 2003: 709,236
San José population, 2003: 919,555
(b) Farm implements have been combined to comply with disclosure rules for San José data.
Sources: State Board of Equalization, 2003; 2003 California Department of Finance; BAE, 2005.

Appendix Table 4: San José Leakage Analysis Per Household Spending, 2003

Outlets	Santa Clara & San Mateo Counties (a)	Santa Clara County (a)	San José (a)	Per HH Santa Clara & San Mateo Sales (a)	Per HH Santa Clara Sales (a)	Per HH San José Sales (a)	San José Injection/ (Leakage)
Apparel:							
Women's apparel	$356,482	$276,276	$98,955	$424	$474	$345	-19%
Men's apparel	$82,748	$65,271	$34,250	$98	$112	$120	21%
Family apparel	$631,001	$457,437	$248,084	$751	$786	$866	15%
Shoes	$171,976	$130,515	$69,825	$205	$224	$244	19%
Subtotal	***$1,242,207***	***$929,499***	***$451,113***	***$1,478***	***$1,596***	***$1,574***	***7%***
General Merchandise:							
General merchandise stores	$3,285,182	$2,250,674	$887,882	$3,910	$3,865	$3,099	-21%
Drug stores	$511,718	$338,650	$151,154	$609	$582	$528	-13%
Subtotal	***$3,796,900***	***$2,589,324***	***$1,039,036***	***$4,518***	***$4,447***	***$3,626***	***-20%***
Specialty Stores:							
Gifts, art goods, and novelties	$137,540	$89,165	$42,521	$164	$153	$148	-9%
Sporting goods	$309,273	$214,784	$86,618	$368	$369	$302	-18%
Florists	$75,531	$49,584	$10,394	$90	$85	$36	-60%
Photo equip. and musical instruments	$181,504	$146,093	$48,795	$216	$251	$170	-21%
Stationery and books	$284,224	$209,847	$72,943	$338	$360	$255	-25%
Jewelry	$228,383	$179,461	$84,549	$272	$308	$295	9%
Office, store and school supplies	$1,528,219	$1,163,307	$308,634	$1,819	$1,998	$1,077	-41%
Other specialties	$1,254,269	$856,358	$458,294	$1,493	$1,471	$1,599	7%
Subtotal	***$3,998,943***	***$2,908,599***	***$1,112,747***	***$4,759***	***$4,995***	***$3,884***	***-18%***
Food Stores:							
Food stores selling all types of liquors	$887,242	$586,192	$268,113	$1,056	$1,007	$936	-11%
All other food stores	$332,461	$233,735	$146,425	$396	$401	$511	29%
Subtotal	***$1,219,703***	***$819,927***	***$414,539***	***$1,452***	***$1,408***	***$1,447***	***0%***
Eating and drinking:							
Eating places: no alcoholic beverages	$1,076,965	$759,945	$368,203	$1,282	$1,305	$1,285	0%
Eating places: beer and wine	$1,030,075	$757,771	$306,695	$1,226	$1,301	$1,070	-13%
Eating and drinking: all types of liquor	$983,920	$621,612	$220,596	$1,171	$1,068	$770	-34%
Subtotal	***$3,090,960***	***$2,139,328***	***$895,494***	***$3,678***	***$3,674***	***$3,125***	***-15%***
Household/Home Furnishings:							
Household and home furnishings	$860,682	$554,000	$132,873	$1,024	$951	$464	-55%
Household appliance dealers	$375,514	$244,640	$267,992	$447	$420	$935	109%
Subtotal	***$1,236,196***	***$798,640***	***$400,865***	***$1,471***	***$1,372***	***$1,399***	***-5%***
Building Materials:							
Lumber and building materials	$1,541,993	$929,024	$443,368	$1,835	$1,596	$1,547	-16%
Hardware stores	$291,558	$205,604	$99,975	$347	$353	$349	1%
Paint, glass, wallpaper, plumbing & elec. Supplies	$278,511	$180,053	$37,730	$331	$309	$132	-60%
Subtotal	***$2,112,062***	***$1,314,681***	***$581,073***	***$2,513***	***$2,258***	***$2,028***	***-19%***
Automotive:							
New motor vehicle dealers	$4,267,200	$2,760,775	$1,226,651	$5,078	$4,742	$4,281	-16%
Used motor vehicle dealers	$237,988	$163,552	$68,974	$283	$281	$241	-15%
Automotive supplies and parts	$303,212	$218,821	$149,361	$361	$376	$521	44%
Service stations	$2,068,711	$1,413,227	$767,478	$2,462	$2,427	$2,679	9%
Subtotal	***$6,877,111***	***$4,556,375***	***$2,212,464***	***$8,184***	***$7,825***	***$7,722***	***-6%***
Other Retail:							
Packaged liquor stores	$192,591	$123,713	$51,219	$229	$212	$179	-22%
Second-hand merchandise	$36,338	$15,591	$10,189	$43	$27	$36	-18%
Farm Implements (b)	$60,422	$51,219	$31,428	$72	$88	$110	53%
Farm & Garden	$142,259	$87,671	$20,094	$169	$151	$70	-59%
Fuel&ice, mobile home, trailer, camper, boat,	$210,938	$180,527	$8,715	$251	$310	$30	-88%
Subtotal	***$642,548***	***$458,721***	***$121,646***	***$765***	***$788***	***$425***	***-44%***
Retail Stores Total	**$24,216,630**	**$16,515,094**	**$7,228,977**	**$28,819**	**$28,364**	**$25,229**	**-12%**

Notes:
(a) Santa Clara County households, 2003: 582,252
San Mateo County households, 2003: 258,051
San José households, 2003: 286,531
(b) Farm implements have been combined to comply with disclosure rules for San José data.
Sources: State Board of Equalization, 2003; 2003 California Department of Finance; BAE, 2005.