Appendix D

DKS Vehicle Miles Traveled Analysis Memorandum
VMT ANALYSIS

DATE: May 13, 2020

TO: Aelita Milatzo, Pelle Clarke | City of Sacramento

FROM: Vic Maslanka, Erin Vaca | DKS Associates

SUBJECT: VMT Analysis

Natomas Town Center Phase 2

Project #19179-005

This memorandum summarizes the VMT analysis for CEQA purposes of the Natomas Town Center Phase 2 project located at the northeast corner of Del Paso Road and Town Center Drive in North Natomas in the City of Sacramento.

BACKGROUND

The Natomas Town Center Phase 2 project consists of 78,036 square feet of commercial space in the North Natomas area of the City of Sacramento. The project plan shows uses that include a health club, day care, bank, restaurants, and retail space. An earlier transportation analysis evaluated vehicular trip generation and distribution, traffic circulation, and intersection operations (delay and queuing).¹ This VMT analysis is being conducted for the project for the purposes of CEQA review.

PROJECT DESCRIPTION

As illustrated in Figure 1, the project is located on the northeast corner of Del Paso Road and Town Center Drive. The project is located just east of the existing Natomas Town Center (across Town Center Drive), which is a shopping center anchored by a Safeway grocery store.

Figure 2 illustrates the project site plan. Table 1 summarizes the project the land uses. The project contains a bank (3,827 s.f.), day care (12,072 s.f.), health club (38,295 s.f.), retail space in two buildings (11,600 s.f.), and restaurants (12,242 s.f.).

¹ Transportation Analysis, Natomas Town Center Phase 2, prepared for City of Sacramento, DKS Associates, May 12, 2019.
FIGURE 2 – SITE PLAN
TABLE 1: PROJECT COMPONENTS

<table>
<thead>
<tr>
<th>BUILDING</th>
<th>COMPONENT</th>
<th>SIZE (SQUARE FEET)</th>
</tr>
</thead>
<tbody>
<tr>
<td>BANK</td>
<td>Bank with ATM Drive-Through</td>
<td>3,827</td>
</tr>
<tr>
<td>DAY CARE</td>
<td>Day Care</td>
<td>12,072</td>
</tr>
<tr>
<td>HEALTH CLUB</td>
<td>Health Club</td>
<td>38,295</td>
</tr>
<tr>
<td>PAD 1</td>
<td>Sit-Down Restaurant</td>
<td>7,842</td>
</tr>
<tr>
<td>SHOPS 1</td>
<td>Retail</td>
<td>5,800</td>
</tr>
<tr>
<td></td>
<td>Fast Casual Restaurant (Take-out)</td>
<td>2,200</td>
</tr>
<tr>
<td>SHOPS 2</td>
<td>Retail</td>
<td>5,800</td>
</tr>
<tr>
<td></td>
<td>Coffee/Donut Shop with Drive-Through</td>
<td>2,200</td>
</tr>
<tr>
<td>TOTAL</td>
<td>All</td>
<td>78,036</td>
</tr>
</tbody>
</table>

Source: Conceptual Site Plan, Creekside Marketplace, February 28, 2020; City of Sacramento.

VMT IMPACT CRITERIA – SB 743

Senate Bill 743 (Steinberg, 2018), codified in Public Resources Code section 21099, required changes to the CEQA Guidelines on the analysis of transportation impacts. In January 2019, the Natural Resources Agency updated the CEQA Guidelines in response to SB 743. The revised guidelines state, “Generally, vehicle miles traveled is the most appropriate measure of transportation impacts.” In addition, “Except as provided in subdivision (b)(2) below…a project’s effect on automobile delay shall not constitute a significant environmental impact.” With respect to the timing of the change to the CEQA Guidelines, “A lead agency may elect to be governed by the provisions of this section immediately. Beginning on July 1, 2020, the provisions of this section shall apply statewide.”

The most authoritative guidance on implementing the SB 743 changes comes from the Governor’s Office of Planning and Research (OPR), which worked with the Natural Resources Agency to update the CEQA Guidelines. In December 2018, OPR published technical guidance recommending approaches to analyzing transportation and land use projects. Because new retail development often redistributes trips rather than creating new travel demand, the OPR guidance recommends

2 California Code of Regulations, Title 14, Division 6, Chapter 3, Section 15064.3(c).
that lead agencies analyze the net change in VMT to indicate the transportation impact of retail projects.\textsuperscript{3}

The potential for VMT impacts, according to this approach, hinges on whether the project can be considered local-serving or regional. By adding retail opportunities within existing neighborhoods, local-serving retail projects can shorten trips and reduce overall VMT. In contrast, regional destination retail projects would draw customers from larger trade areas, potentially substituting for shorter trips and increasing VMT. The OPR guidance suggests that any retail projects including stores larger than 50,000 square feet might be considered regional serving retail.

**RETAIL CENTER CHARACTERISTICS**

The classification of commercial centers (retail centers, shopping centers) is complicated by the many possible combinations of uses within any center. However, for purposes of managing and leasing space, the shopping center industry has developed a classification scheme with ten categories, as illustrated in Figure 3. Of the ten categories, the “Strip / Convenience” Center and the “Neighborhood Center” can usually be considered as local-serving retail. These centers, which typically range in size up to 125,000 square feet, are occupied by uses oriented to a trade area of three miles or less. The typical uses are ubiquitous throughout the area, with many nearby competitors, as well as multiple locations of specific tenants. Neighborhood centers require the support of 6,000 to 8,000 households in a one- to two-mile radius.\textsuperscript{4}

**PROJECT ENVIRONS AND CHARACTERISTICS**

As discussed in the description of VMT screening of retail projects, a retail project may result in a reduction of VMT if it is “local-serving retail”. The following characteristics of the environs and of the project itself were evaluated.

**NEARBY LAND USE**

The project is in the North Natomas Community Plan area, which encompasses about 9,000 acres in an urban form including a mixture of residential, employment, commercial, and civic uses.\textsuperscript{5} Del Paso Boulevard, a six-lane arterial roadway, provides primary access. As shown in Figure 4, the General Plan designation for the site is “Traditional Center”, with “Urban Center High” designation across Del Paso Road.

\textsuperscript{3} Governor’s Office of Planning and Research, Technical Advisory on Evaluating Transportation Impacts in CEQA. (New York: Free Press, December 2018), 15–16.

\textsuperscript{4} A Primer on Retail Types and Urban Centers, Robert Steuteville, Congress for the New Urbanism, Public Square, September 1, 2007.

\textsuperscript{5} 2035 General Plan, North Natomas Community Plan, City of Sacramento, Adopted March 3, 2015.
<table>
<thead>
<tr>
<th>Type of Shopping Center</th>
<th>Concept</th>
<th>Center Count</th>
<th>Aggregate GLA (Sq. Ft.)</th>
<th>Typical GLA Range (Sq. Ft.)</th>
<th>Typical Number of Tenants</th>
<th>Typical Type of Anchors</th>
<th>Trade Area Size</th>
<th>% Anchor GLA</th>
<th>% Share of Industry GLA</th>
<th>Average Size (Sq. Ft.)</th>
<th># of Anchors</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>General-Purpose Centers</td>
<td></td>
<td>1,172,570</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>--</td>
</tr>
<tr>
<td>Super-Regional Mall</td>
<td>Similar in concept to regional malls, but offering more variety and assortment.</td>
<td>620</td>
<td>778,336,548</td>
<td>10.2%</td>
<td>1,255,382</td>
<td>800,000+</td>
<td>60-120</td>
<td>3+</td>
<td>50-70%</td>
<td>NA</td>
<td>Full-line or junior department store, mass merchant, discount department store and/or fashion apparel store.</td>
<td>5-25 miles</td>
</tr>
<tr>
<td>Regional Mall</td>
<td>General merchandise or fashion-oriented offerings. Typically, enclosed in a common walkway. Parking surrounds the outside perimeter.</td>
<td>600</td>
<td>353,795,548</td>
<td>4.7%</td>
<td>589,659</td>
<td>400,000-800,000</td>
<td>40-100</td>
<td>2+</td>
<td>50-70%</td>
<td>NA</td>
<td>Full-line or junior department store, mass merchant, discount department store and/or fashion apparel store.</td>
<td>5-15 miles</td>
</tr>
<tr>
<td>Community Center</td>
<td>General merchandise or convenience-oriented offerings. Wider range of apparel and other soft goods offerings than neighborhood centers. The center is usually configured in a line as a strip or may be laid out in an L or U shape, depending on the site and design.</td>
<td>9,776</td>
<td>1,930,849,736</td>
<td>25.4%</td>
<td>197,509</td>
<td>125,000-400,000</td>
<td>10-40</td>
<td>2+</td>
<td>40-60%</td>
<td>NA</td>
<td>Discount store, supermarket, drug, large specialty discount (toys, books, electronics, home improvement/furnishings or sporting goods, etc.)</td>
<td>3-6 miles</td>
</tr>
<tr>
<td>Neighborhood Center</td>
<td>Convenience oriented.</td>
<td>32,566</td>
<td>2,340,711,371</td>
<td>30.8%</td>
<td>71,827</td>
<td>30,000-125,000</td>
<td>3-5</td>
<td>1+</td>
<td>30-50%</td>
<td>NA</td>
<td>5-20 stores, supermarket</td>
<td>3 miles</td>
</tr>
<tr>
<td>Strip/Convenience</td>
<td>Attached row of stores or service outlets managed as a coherent retail entity, with on-site parking usually located in front of the stores. Open canopies may connect the store fronts, but a strip center does not have enclosed walkways linking the stores. A strip center may be configured as a straight line, or have an &quot;L&quot; or &quot;U&quot; shape. A convenience center is among the smallest of the centers, whose tenants provide a narrow mix of goods and personal services to a very limited trade area.</td>
<td>68,936</td>
<td>911,202,922</td>
<td>12.0%</td>
<td>13,218</td>
<td>&lt; 30,000</td>
<td>&lt;3</td>
<td>Anchorless or a small convenience-store anchor</td>
<td>NA</td>
<td>NA</td>
<td>Convenience store, such as a minimart.</td>
<td>&lt;1 mile</td>
</tr>
<tr>
<td>Specialized-Purpose Centers</td>
<td></td>
<td>3,276</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>--</td>
</tr>
<tr>
<td>Power Center</td>
<td>Category-dominant anchors, including discount department stores, off-price stores, wholesale clubs, with only a few small tenants.</td>
<td>2,258</td>
<td>990,416,667</td>
<td>13.0%</td>
<td>488,626</td>
<td>250,000-600,000</td>
<td>25-80</td>
<td>3+</td>
<td>70-90%</td>
<td>NA</td>
<td>Category killers, such as home improvement, discount department, warehouse club and off-price stores</td>
<td>5-10 miles</td>
</tr>
<tr>
<td>Lifestyle</td>
<td>Upscale national-chain specialty stores with dining and entertainment in an outdoor setting.</td>
<td>491</td>
<td>164,903,247</td>
<td>2.2%</td>
<td>335,852</td>
<td>150,000-300,000</td>
<td>10-40</td>
<td>0-2</td>
<td>0-50%</td>
<td>NA</td>
<td>Large format upscale specialty</td>
<td>8-12 miles</td>
</tr>
<tr>
<td>Factory Outlet</td>
<td>Manufacturers’ and retailers’ outlet stores selling brand-name goods at a discount.</td>
<td>367</td>
<td>87,368,113</td>
<td>1.2%</td>
<td>238,060</td>
<td>50,000-400,000</td>
<td>10-50</td>
<td>NA</td>
<td>NA</td>
<td>NA</td>
<td>Manufacturers’ and retailers’ outlets</td>
<td>25-75 miles</td>
</tr>
<tr>
<td>Theme/Festival</td>
<td>Leisure, tourist, retail and service-oriented offerings with entertainment as a unifying theme. Often located in urban areas, they may be adapted from older—sometimes historic—buildings and can be part of a mixed-use project.</td>
<td>159</td>
<td>23,498,769</td>
<td>0.3%</td>
<td>147,791</td>
<td>80,000-200,000</td>
<td>6-20</td>
<td>Unspecified</td>
<td>NA</td>
<td>NA</td>
<td>Restaurants, entertainment</td>
<td>25-75 miles</td>
</tr>
<tr>
<td>Limited-Purpose Property</td>
<td></td>
<td>62</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
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<td></td>
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</tr>
<tr>
<td>Airport Retail</td>
<td>Consolidation of retail stores located within a commercial airport</td>
<td>62</td>
<td>15,452,860</td>
<td>0.2%</td>
<td>249,240</td>
<td>75,000-300,000</td>
<td>NA</td>
<td>NA</td>
<td>NA</td>
<td>NA</td>
<td>No anchors; retail includes specialty retail and restaurants</td>
<td>NA</td>
</tr>
</tbody>
</table>

**U.S. Shopping-Center Classification and Characteristics**

Sources: ISC Research and CoStar Realty Information, Inc. ([www.costar.com](http://www.costar.com)) January 2017

**FIGURE 3 – SHOPPING CENTER CLASSIFICATION AND CHARACTERISTICS**
FIGURE 4 – 2035 GENERAL PLAN DESIGNATIONS
To the west of the site across Town Center Drive is the Natomas Town Center, a neighborhood retail center of about 130,000 square feet with a Safeway grocery store. To the northwest is Homecoming at Creekside Natomas, a 450-unit apartment community. To the north across New Market Drive is the North Natomas Regional Park.

To the east across Via Ingoglia is Inderkum High School, American River College (ARC) Natomas Center, and the North Natomas Library. Several office buildings are located across Del Paso Boulevard from the site. Estimated 2018 population within two miles is 54,301, and 81,310 within three miles.\(^6\)

Near the project, several projects have been approved but are have not yet been constructed and fully occupied. These projects are illustrated on Figure 5 and summarized in Table 2.

**PROJECT COMPONENTS**

The proposed project components are retail / service uses that are common throughout the North Natomas area. They are intended to serve the local area and will compete with nearby businesses. No “unique” or destination-retail uses are proposed which would be likely to attract a substantial number of long-distance trips.

- **Bank** – There are numerous banks located within one mile of the site, including US Bank, Bank of America, Five Star Bank, SAFE Credit Union, Wells Fargo Bank, and Tri Counties Bank.
- **Day Care** – There are approximately ten day care centers within two miles of the site.
- **Health Club** – There are approximately ten fitness centers / health clubs within two miles of the site.
- **Restaurants / Coffee Shops** – There are over twenty dining establishments within two miles of the site.
- **Retail Space** – There are two retail components, each at 5,800 square feet, which may be divided. Although tenants are unknown, it is anticipated that these uses would be like those in the adjacent Natomas Town Center, comprised of small businesses and services oriented to the local community.

**PROJECT TRAVEL PATTERNS**

The earlier transportation analysis provides quantitative estimates of project vehicular trip generation. The project is estimated to generate 8,833 vehicle trips.

- About 23 percent of the trips will be internal trips. These internal trips between uses on the site will replace automobile trips.

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\(^6\) Fact Sheet, Natomas Town Center, CBRE.
1. North Natomas Community Center and Aquatics Complex (NNCCAC)
2. New Market Drive Segment
3. Creekside Apartments
4. Centene
5. Medley Apartments
6. Aloft Hotel
7. Vibra Rehab Hospital
8. Spanos Apartments
9. Innovate Corporate Center
10. 20 Advantage Court
11. Provance Condominiums
12. Natomas Crossing Area 3
13. Arena Seniors
14. Natomas Crossing Office

FIGURE 5 – NEARBY APPROVED PROJECTS
<table>
<thead>
<tr>
<th>PROJECT</th>
<th>LOCATION</th>
<th>DESCRIPTION</th>
</tr>
</thead>
</table>
| 1. NORTH NATOMAS COMMUNITY CENTER AND AQUATICS COMPLEX (NNCCAC)        | North side of New Market Drive between Town Center Drive and Via Ingoglia | • Community Center (16,000 square feet)  
• Aquatic Center (Swimming Pools, Concession Areas – 35,000 square feet) |
| 2. NEW MARKET DRIVE SEGMENT                                            | Town Center Drive to Via Ingoglia                                         | New two-lane roadway with median                                                                                                          |
| 3. CREEKSIDE APARTMENTS                                               | North and south sides of New Market Drive east of East Commerce Way      | 120 Apartments                                                                                                                             |
| 4. CENTENE                                                             | West side of East Commerce Way between Arena Drive and future Snowy Egret Drive | Office (1,250,000 square feet)                                                                                                             |
| 5. MEDLEY APARTMENTS                                                  | East side of East Commerce Way South of Arena Main Entrance               | 160 Apartments                                                                                                                             |
| 6. ALOFT HOTEL                                                        | 3041 Advantage Way                                                        | 131 rooms                                                                                                                                  |
| 7. VIBRA REHAB HOSPITAL                                               | 10 Advantage Court                                                        | 62,061 square feet hospital                                                                                                               |
| 8. SPANOS APARTMENTS                                                  | Southeast corner Arena Boulevard and Innovator Drive                      | 293 Apartments                                                                                                                             |
| 9. INNOVATE CORPORATE CENTER                                          | Northeast corner of East Commerce Way and Arena Boulevard                | 120 room hotel                                                                                                                             |
| 10. 20 ADVANTAGE COURT                                                | 20 Advantage Court                                                        | 124 room hotel                                                                                                                             |
| 11. PROVANCE CONDOMINIEMENTS                                          | Southwest corner East Commerce Way and Benefit Way                       | 237 condominiums                                                                                                                           |
| 12. NATOMAS CROSSING AREA 3                                           | Southwest corner East Commerce Way and Arena Boulevard                   | 302,206 square feet office                                                                                                               |
| 13. ARENA SENIORS                                                      | Southwest corner Truxel Road and Terracina Drive                         | 240 apartments                                                                                                                             |
| 14. NATOMAS CROSSING OFFICE                                           | Southeast corner Advantage way and Advantage Court                       | 122,500 square feet office                                                                                                               |

• About 28 percent are expected to be pass-by trips. Pass-by trips are vehicle trips that access the project site that are already on the roadway network driving past the site. These linked trips result in minimal changes in VMT.

The resultant new external vehicle trips are estimated to be 4,304 daily.

The project also has good pedestrian access to nearby uses, which could reduce automobile trips to the site. To the west, a new traffic signal with pedestrian crossing will provide direct access to Natomas Town Center. To the east, via sidewalks and a planned pedestrian crossing, Inderkum High School, ARC Natomas Center, and the North Natomas Library can be accessed. To the north across New Market Drive via Town Center Drive and Via Ingoglia, the North Natomas Regional Park and planned North Natomas Community Center and Aquatics Complex (NNCCAC) can be accessed.

THRESHOLDS OF SIGNIFICANCE

Consistent with Appendix G of the CEQA Guidelines, thresholds of significance adopted by the governing jurisdictions in applicable general plans and previous environmental documents, and professional judgement, a significant impact would occur if the proposed project would:

VEHICLE MILES TRAVELED (VMT) – CITY OF SACRAMENTO

Impacts to the roadway system are considered significant if the proposed retail project would:

• Result in an increase in VMT.
• Projects consisting of local-serving retail are presumed to have a less than significant impact.

IMPACTS AND MITIGATION MEASURES

Impact: The proposed project could cause potentially significant impacts to the roadway network. Based on the analysis below, the impact is less than significant.

The project is considered to be local-serving retail, which is presumed to have a less than significant impact based upon OPR guidance.

The proposed retail project would consist of local serving uses. The store types within the center are common in the area, with many nearby competitors. Each of the stores within the center is smaller than 50,000 square feet. The overall center size falls within the range of “neighborhood center”, which typically has a trade area of three miles. The population within two miles is over 54,000, which is more than the 6,000 to 8,000 households necessary to support the center. In addition to the households, there is a substantial workforce population near the center.

Mitigation Measure
None required.
TECHNICAL APPENDICES
FOR LEASE
Natomas Town Center
NEC Del Paso Road & East Commerce Parkway, Sacramento, CA 95835

PROPERTY INFO
- ±130,000 SF Neighborhood Center
- Excellent location across from Sleep Train Arena
- Easy access from both Interstate 80 and Interstate 5 freeways
- Upscale “Town Center” design
- Major development coming to the area in the Metro Air Park including an ±800,000 SF Amazon warehouse
- Across from Lewis-developed Homecoming at Creekside Natomas, a 450-unit apartment community
- Part of Lewis-developed Creekside Natomas Master Planned Community

DEMOGRAPHICS

<table>
<thead>
<tr>
<th></th>
<th>2 Miles</th>
<th>3 Miles</th>
<th>5 Miles</th>
</tr>
</thead>
<tbody>
<tr>
<td>Estimated Population 2018</td>
<td>54,301</td>
<td>81,310</td>
<td>175,356</td>
</tr>
<tr>
<td>Average Household Income</td>
<td>$101,754</td>
<td>$93,422</td>
<td>$78,185</td>
</tr>
<tr>
<td>Daytime Population</td>
<td>16,271</td>
<td>28,663</td>
<td>65,341</td>
</tr>
</tbody>
</table>

TRAFFIC COUNT
Del Paso Road @ East Commerce Way: 39,321 ADT
Source: Costar

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DEMOGRAPHIC COMPREHENSIVE
DEL PASO ROAD & EAST COMMERCE PARKWAY
54,301 81,310 175,356
57,596 85,709 184,847
48,360 73,910 161,568
1,738 19,395 99,928
1.41% 1.16% 1.00%

2018 Population - Current Year Estimate
2023 Population - Five Year Projection
2010 Population - Census
2000 Population - Census
2010-2018 Annual Population Growth Rate
2018-2023 Annual Population Growth Rate
2018 Population
White
21,450 39.5% 32,370 39.8% 74,290 42.4%
Black or African American
7,637 14.1% 12,024 14.8% 23,460 13.4%
Asian
15,513 28.6% 19,538 24.0% 31,884 18.2%
American Indian or Alaska Native
336 0.6% 618 0.8% 2,043 1.2%
Pacific Islander
673 1.2% 1,052 1.3% 2,648 1.5%
Other Race
4,058 7.5% 8,647 10.6% 26,678 15.2%
Two or More Races
4,634 8.5% 7,062 8.7% 14,354 8.2%
Hispanic
10,593 19.5% 20,177 24.8% 56,537 32.2%
White Non-Hispanic
16,825 31.0% 24,118 29.7% 52,382 29.9%

2018 Population 25 and Over
Less than 9th Grade
1,483 4.2% 2,546 4.9% 9,149 8.3%
9-12th Grade - No Diploma
1,163 3.3% 2,123 4.1% 9,013 8.2%
High School Diploma
5,585 15.9% 8,892 17.0% 24,106 21.9%
GED or Alternative Credential
484 1.4% 922 1.8% 3,405 3.1%
Some College - No Degree
7,629 21.7% 11,765 22.5% 24,881 22.6%
Associate’s Degree
3,732 10.6% 5,676 10.9% 9,903 9.0%
Bachelor’s Degree
9,745 27.7% 13,449 25.7% 19,988 18.1%
Graduate or Professional Degree
5,371 15.3% 6,896 13.2% 9,717 8.8%

2018 Household Income
Under $15,000
1,251 6.6% 1,973 6.9% 6,039 10.4%
$15,000-$24,999
1,201 6.3% 1,912 6.7% 6,011 10.1%
$25,000-$34,999
907 4.8% 1,932 6.8% 4,883 8.4%
$35,000-$49,999
1,559 8.2% 2,892 10.1% 7,635 13.1%
$50,000-$74,999
3,350 17.7% 5,199 18.2% 10,961 18.8%
$75,000-$99,999
2,843 15.0% 4,346 15.2% 7,709 13.2%
$100,000-$149,999
4,233 22.3% 5,851 20.5% 9,190 15.8%
$150,000-$199,999
2,126 11.2% 2,651 9.3% 3,655 6.3%
$200,000 and Over
1,491 7.9% 1,822 6.4% 2,717 4.7%
2018 Average Household Income
$101,754 $93,422 $78,185
2023 Average Household Income
$121,583 $111,534 $92,739
2018 Median Household Income
$83,890 $76,634 $59,231
2023 Median Household Income
$100,155 $98,693 $68,831
2018 Per Capita Income
$35,482 $32,987 $26,207
2023 Per Capita Income
$42,031 $39,057 $30,844

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CONGRESS FOR THE NEW URBANISM
A PRIMER ON RETAIL TYPES AND URBAN CENTERS
PSQ (/publicsquare)

A primer on retail types and urban centers

ROBERT STEUTEVILLE (/node/538)  SEP. 1, 2007

Developing and managing retail centers remains one of the most risky of all real estate categories. Retailers must respond to ever-changing consumer trends and demands, while constantly fending off new competition. As a result, the retail industry relies upon proven methods and techniques to minimize the risk and to earn a market rate of return on investment. This risk is more acute in mixed-use urban developments, where vacant store fronts or undesirable retailers can significantly disrupt the surrounding residential and office quality of life.

Most shopping centers fall into one of six primary proven types. Each type of center appeals to distinct market segments and has specific sizes, tenants, location criteria and site plan standards. Although there are always exceptions to these commercial center types, centers that deviate from these industry standards and sizes are often considered risky and difficult to finance or lease.

These primary shopping center types are: The corner store, convenience center, neighborhood center, community center, regional center, and the lifestyle (town) center. In addition, each of these center types can be “supersized” or increased by 30 to 50 percent.

Corner stores
The smallest and most useful retail type, the corner store, ranges from 1,500 to 3,000 square feet. These small stores offer beverages, food and sundries that are needed on a regular basis by most households, workers, and travelers. Beer, bread, cigarettes, prepared sandwiches, sundries, and snacks represent the bulk of their sales. These stores primarily offer convenience over selection and value.

Corner stores ideally are located along major local roads at the busiest entry to the neighborhood. However, in densely populated TND’s, the corner store can be sustainable within the neighborhood when located along its primary street. The store also benefits if located adjacent to community buildings, parks and schools.

Approximately 1,000 households are necessary to support the average corner store. This number can be reduced significantly if the store is located along a major road with 15,000 or more cars per day. Corner stores that also sell gasoline are supportable with virtually no adjacent homes.

https://www.cnu.org/publicsquare/primer-retail-types-and-urban-centers
Convenience centers
Typically between 10,000 to 30,000 square feet, these centers offer an array of goods and services geared towards the daily needs of the surrounding neighborhoods. These centers are often anchored with a small specialty food market or pharmacy. Convenience centers tenants offer a limited balance of food, personal services, and local offices.

Typical tenants include a bagel store, bakery, bank, coffee shop, dry cleaner, financial services, florist, food market, ice cream shop, laundry center, mail center, package liquor store, personal services, pharmacy, real estate office, or tailor.

Convenience centers need about 2,000 households — the equivalent of about two TND neighborhoods — to be supportable. These centers must be located along a major road, ideally at the primary entry to both neighborhoods. Their average trade area typically extends up to a 1.5-mile radius.

Neighborhood centers
Anchored with a supermarket, pharmacy, or video store, neighborhood centers offer a full depth of goods and services not available at smaller centers. The primary anchor is a full-sized supermarket typically ranging from 45,000 to 60,000 square feet. This major anchor is the engine that supports most of the other smaller businesses to the extent that if a supermarket closes, many of the other tenants will immediately leave the center.

Neighborhood centers generally range from 70,000 to 90,000 square feet in total size (including the supermarket) and require the support of 6,000 to 8,000 households in a 1- to 2-mile radius. Most households in the primary trade area will visit the center once or twice a week. However, in very rural areas it’s not unusual for residents to drive more than 50 miles weekly to visit a neighborhood center.

These centers typically have 10 to 15 smaller retailers such as a bakery, bank, cafe, dollar store, dry cleaner, florist, food market, mail center, pharmacy, tanning salon, family restaurant, laundry center, or stores that sell hardware, electronics, bagels, bicycles, cards, eyewear, shoes, financial services, picture frames, home furnishings, ice cream, jewelry, liquor, telephones, personal services, or rent DVDs.

Community centers
The backbone of the shopping industry, community centers are larger than neighborhood centers but often include the same tenants. Typically 250,000–350,000 square feet in size, community centers pull from a 4 to 6 mile trade area with a 50,000 or greater population. Many community centers exceed 500,000 square feet when multiple anchors are included.

The centers often include discount department stores, home improvement stores, sporting goods, apparel, booksellers, restaurants, and supermarkets. These centers are a challenge to plan in a pure new urban model, although plans using A-B quality formats — a high-quality main street (A) combined with a suburban planned area (B) — have proven acceptable by leading retailers, when demographics are favorable.

Regional centers
The largest shopping center type, regional centers focus on apparel and goods typically sold in department stores. The centers are always anchored with multiple full-sized fashion department stores and often include 200,000 to 300,000 square feet of inline shops and restaurants. The regional center generally exceeds 900,000 square feet, but can go up to 2 million square feet. The centers have an average trade area of 10 to 12 miles in suburban densities.

The lead department stores determine when and where the regional centers open and often seek at least 150,000 persons living within the primary trade area. Recently, discount department stores have been welcomed to regional centers in response to consumer preferences and the consolidation of traditional department stores.
First opened in the mid-1950s, regional mall growth has slowed due to increased competition from community and lifestyle centers. Most regional centers are enclosed and self-contained; however, new open air formats are being tested. Recently numerous regional centers have been converted into mixed-use open air centers.

**Lifestyle centers**
The newest retail type, the lifestyle center was created in an effort to offer upscale fashion and home furnishing centers without department stores. These open-air centers have become very successful with busy shoppers who seek specific favorite shops. The centers are built with and without streets; however those with streets tend to be more successful.

With a 4- to 6-mile trade area, lifestyle centers can squeeze between regional centers or into tight niche markets that are underserved by retail. Most retailers seek access to at least 75,000 households earning a minimum of $75,000 per year. However, the lifestyle center format has been proven to work for moderately priced retailers that have a broader consumer base. Developers have recently found that the lifestyle format when combined with residential, office, and community uses can increase traffic and improve overall performance. These new mixed-use centers are often referred to as “town centers.”

Although town centers often closely parallel many new urban principles, they pose a potential threat to historic downtowns. This “main street” collection of popular retailers and restaurants combined with conventional parking and modern retail management techniques offers shoppers an experience that is perceived as “urban enough.” Ideally the popular shopping center formats could be woven into existing downtowns so they don’t compete with retailers on historic main streets.

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