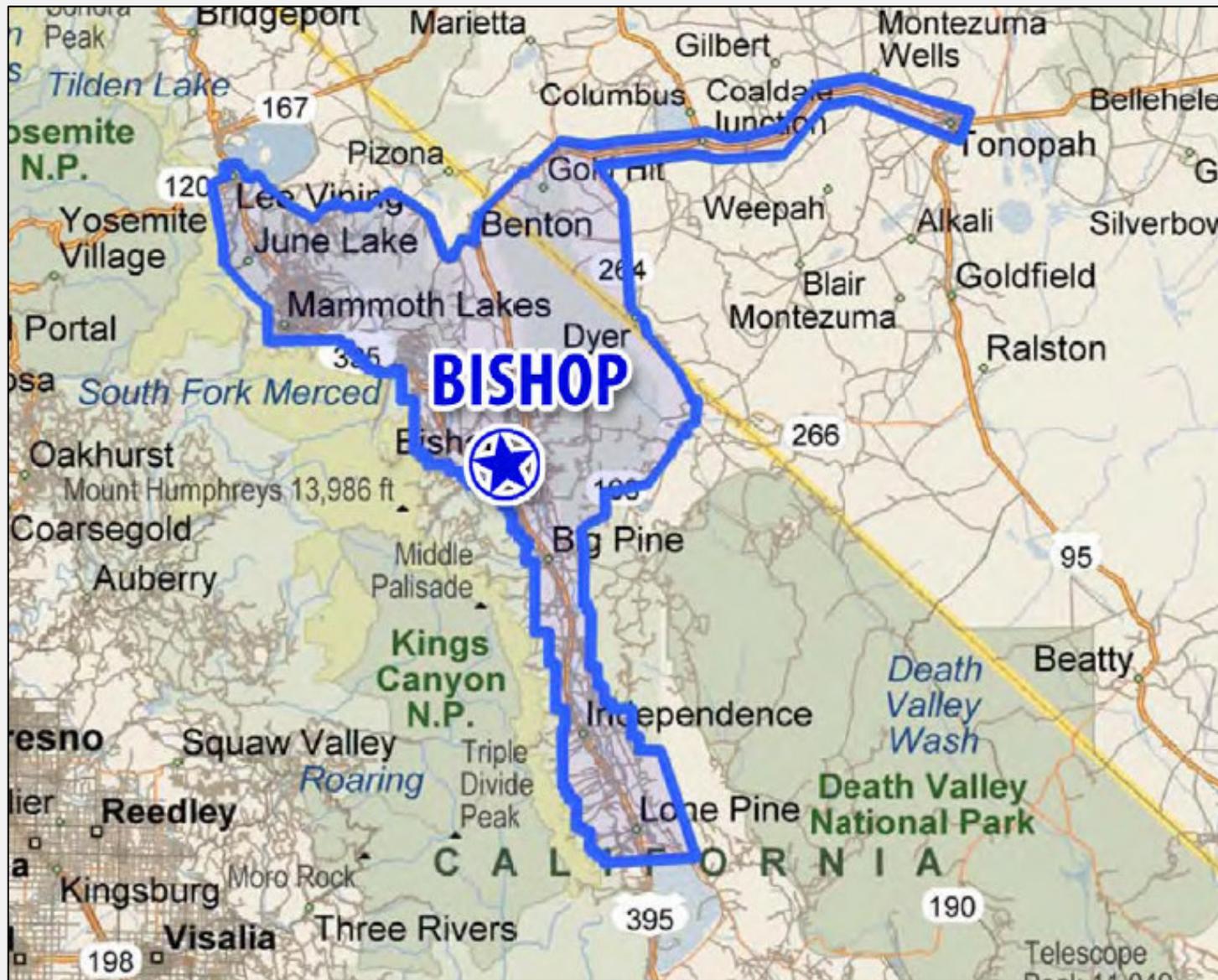




Retail Trade Area Determination & Retail Leakage Analysis



Presentation to Bishop, CA
by Aaron Farmer
National Project Director



Population

	1990	2000	2010 Estimate	2015 Projection
Bishop	3,475	3,575	3,523	3,523
Retail Trade Area	27,194	28,893	28,554	28,731

Income

	2010 Estimate
Average Household	\$69,741
Median Household	\$52,318
Per Capita	\$29,856

Race Distribution

	2010 Estimate
White	76.69%
Black or African American	0.78%
American Indian/Alaskan	7.31%
Asian	1.19%
Native Hawaiian/Islander	0.09%
Other Race	9.49%
Two or More Races	4.44%
Hispanic or Latino (of any race)	20.60%

Age

Groups	2010 Estimate
Under 5 Years	6.12%
5 - 14 Years	10.80%
15 - 20 Years	7.51%
21 - 24 Years	5.04%
25 - 34 Years	14.53%
35 - 44 Years	11.79%
45 - 54 Years	15.76%
55 Years and over	28.44%
Distribution	2010 Estimate
Median Age	40.08
Average Age	40.03

Educational Attainment

	2010 Estimate
Graduate or Professional	7.76%
Bachelor's Degree	13.23%
Associate Degree	8.96%
Some College, no degree	28.91%
High School Graduate	30.06%
Some High School, no degree	6.13%
Less than 9th grade	4.96%

Retail Leakage “Gap” Analysis

- Identify specific retail sectors that are underserved
- Identify opportunities for product or service expansion
- Identify which retailers can successfully fill these “gaps”

\$311,443,200 in potential retail sales in Bishop’s Retail Trade Area.

\$162,300,000 in actual retail sales in Bishop’s Retail Trade Area.

\$149,143,200 leaking out of Bishop’s Retail Trade Area.

Goal: Keep residents shopping in Bishop to help reduce this leakage.

SIC	RETAIL SECTOR	POTENTIAL SALES	EST. ACTUAL SALES	SURPLUS/LEAKAGE	% SURPLUS
521	Lumber and Other Building Materials	\$8,931,613	\$8,800,000	-\$131,613	-1%
523	Paint, Glass and Wallpaper	\$2,679,971	\$1,700,000	-\$979,970	-37%
525	Hardware Stores	\$7,831,798	\$600,000	-\$7,231,798	-92%
526	Retail Nurseries and Garden	\$3,277,316	\$1,300,000	-\$1,977,316	-60%
527	Mobile Home Dealers	\$422,505	\$0	-\$422,505	-100%
53	General Merchandise Stores	\$25,401,610	\$27,700,000	\$2,298,391	9%
541	Grocery Stores	\$41,272,850	\$31,800,000	-\$9,472,847	-23%
542	Meat and Fish Markets	\$1,200,576	\$0	-\$1,200,576	-100%
543	Fruit and Vegetable Markets	\$1,771,318	\$0	-\$1,771,318	-100%
544	Candy, Nut and Confection Stores	\$326,688	\$0	-\$326,688	-100%
545	Dairy Products Stores	\$213,999	\$0	-\$213,999	-100%
546	Retail Bakeries	\$773,363	\$2,000,000	\$1,226,637	159%
549	Miscellaneous Food Stores	\$4,493,430	\$400,000	-\$4,093,429	-91%
551	New and Used Car Dealers	\$48,214,900	\$20,600,000	-\$27,614,910	-57%
552	Used Car Dealers	\$4,258,949	\$500,000	-\$3,758,949	-88%
553	Auto and Home Supply Stores	\$9,814,212	\$4,800,000	-\$5,014,212	-51%
554	Gasoline Service Stations	\$6,363,155	\$5,700,000	-\$663,154	-10%
555	Boat Dealers	\$1,495,639	\$0	-\$1,495,639	-100%
556	Recreational Vehicle Dealers	\$1,206,226	\$0	-\$1,206,226	-100%
557	Motorcycle Dealers	\$1,673,069	\$2,800,000	\$1,126,931	67%
559	Automotive Dealers, NEC	\$2,337,823	\$0	-\$2,337,823	-100%
561	Men's and Boys' Clothing Stores	\$973,236	\$0	-\$973,236	-100%
562	Women's Clothing Stores	\$2,056,101	\$200,000	-\$1,856,101	-90%
563	Women's Accessory and Specialty Stores	\$351,643	\$0	-\$351,643	-100%
564	Children's and Infants' Wear	\$508,434	\$0	-\$508,434	-100%
565	Family Clothing Stores	\$2,071,717	\$0	-\$2,071,717	-100%

566	Shoe Stores	\$2,429,952	\$400,000	-\$2,029,952	-84%
569	Miscellaneous Apparel and Accessory Stores	\$1,286,741	\$200,000	-\$1,086,741	-84%
571	Home Furniture and Furnishing	\$10,404,100	\$4,400,000	-\$6,004,102	-58%
572	Household Appliance Stores	\$2,180,326	\$3,000,000	\$819,674	38%
573	Radio, TV, and Computer Stores	\$28,915,680	\$1,500,000	-\$27,415,680	-95%
5812	Eating Places	\$43,516,190	\$25,300,000	-\$18,216,190	-42%
5813	Drinking Places	\$945,456	\$200,000	-\$745,456	-79%
591	Drug Stores and Proprietary	\$7,925,575	\$3,800,000	-\$4,125,575	-52%
592	Liquor Stores	\$1,075,802	\$0	-\$1,075,802	-100%
593	Used Merchandise Stores	\$1,666,006	\$1,000,000	-\$666,006	-40%
5941	Sporting Goods, Bicycle and Gun Stores	\$1,870,510	\$2,100,000	\$229,490	12%
5942	Book Stores	\$777,365	\$2,300,000	\$1,522,635	196%
5943	Stationery Stores	\$2,535,421	\$600,000	-\$1,935,421	-76%
5944	Jewelry Stores	\$1,113,941	\$400,000	-\$713,940	-64%
5945	Hobby, Toy and Game Shops	\$1,278,187	\$500,000	-\$778,187	-61%
5946	Camera and Photography Supply Stores	\$330,612	\$0	-\$330,612	-100%
5947	Gift, Novelty and Souvenir Shops	\$1,861,642	\$1,900,000	\$38,358	2%
5948	Luggage and Leather Goods Stores	\$129,718	\$0	-\$129,718	-100%
5949	Sewing, Needlework and Craft Stores	\$269,480	\$200,000	-\$69,480	-26%
596	Non-store Retailers	\$4,284,061	\$200,000	-\$4,084,060	-95%
598	Fuel and Ice Dealers	\$329,670	\$0	-\$329,670	-100%
5992	Florists	\$848,227	\$400,000	-\$448,227	-53%
5993	Tobacco Stores and Stands	\$205,838	\$0	-\$205,838	-100%
5994	News Dealers and Newsstands	\$196,656	\$0	-\$196,656	-100%
5995	Optical Goods Stores	\$619,632	\$300,000	-\$319,632	-52%
5999	Miscellaneous Retail Stores, NEC	\$14,524,310	\$4,700,000	-\$9,824,308	-68%
TOTALS		\$311,443,200	\$162,300,000	-\$149,143,200	LEAKAGE

Marketing Materials



Retail Outlook Guide Bishop, California



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Retail Trade Area Summary

Population

	1990	2000	2010 Estimate	2015 Projection
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2010 Estimate	
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January 2011. All information furnished is from sources deemed reliable and is submitted subject to errors, omissions, change of terms and/or conditions. Prepared by The Retail Coach, LLC, a national retail consulting and market research firm. 662.844.2155.

Grocery Stores Opportunity Bishop, California

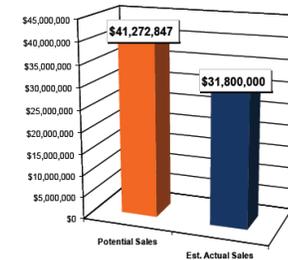
Bishop, California is leaking approximately \$9,472,847 in Grocery Stores sales.

Retail leakage occurs when actual sales within a retail trade area are less than its potential sales.

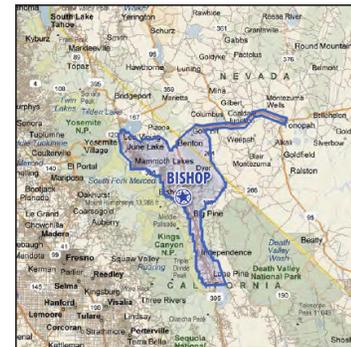
Retail surplus, on the other hand, occurs when actual sales within a retail trade area are greater than its potential sales.

Retail leakage and surplus figures are used to identify the relative health of a community's retail market.

Grocery Stores



Bishop, California Retail Trade Area



Retail Trade Area Demographics

Retail Trade Area Population	28,554
Average Household Income	\$69,741
Per Capita Income	\$29,856
Population by Race/Ethnicity	
White	76.69%
Black or African American	0.78%
Hispanic Origin	20.60%
Median Age	40.08

For more information, contact:

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Sources: The Retail Coach, LLC | U.S. Census Bureau | Claritas 2010, 2011

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Consumer Analytics

Psychographics

Lifestyle Segmentation

The process of dividing a market into groups of consumers with similar demographic characteristics, lifestyles, purchase behaviors and work patterns.



#18 Kids & Cul-de-Sacs

Upscale, suburban, married couples with children—that's the skinny on Kids & Cul-de-Sacs, a lifestyle of large families in recently built subdivisions. With a high rate of Hispanic and Asian Americans, this segment is a refuge for college-educated, white-collar professionals with administrative jobs and upper-middle-class incomes. Their nexus of education, affluence and children translates into large outlays for child-centered products



#43 Heartlanders

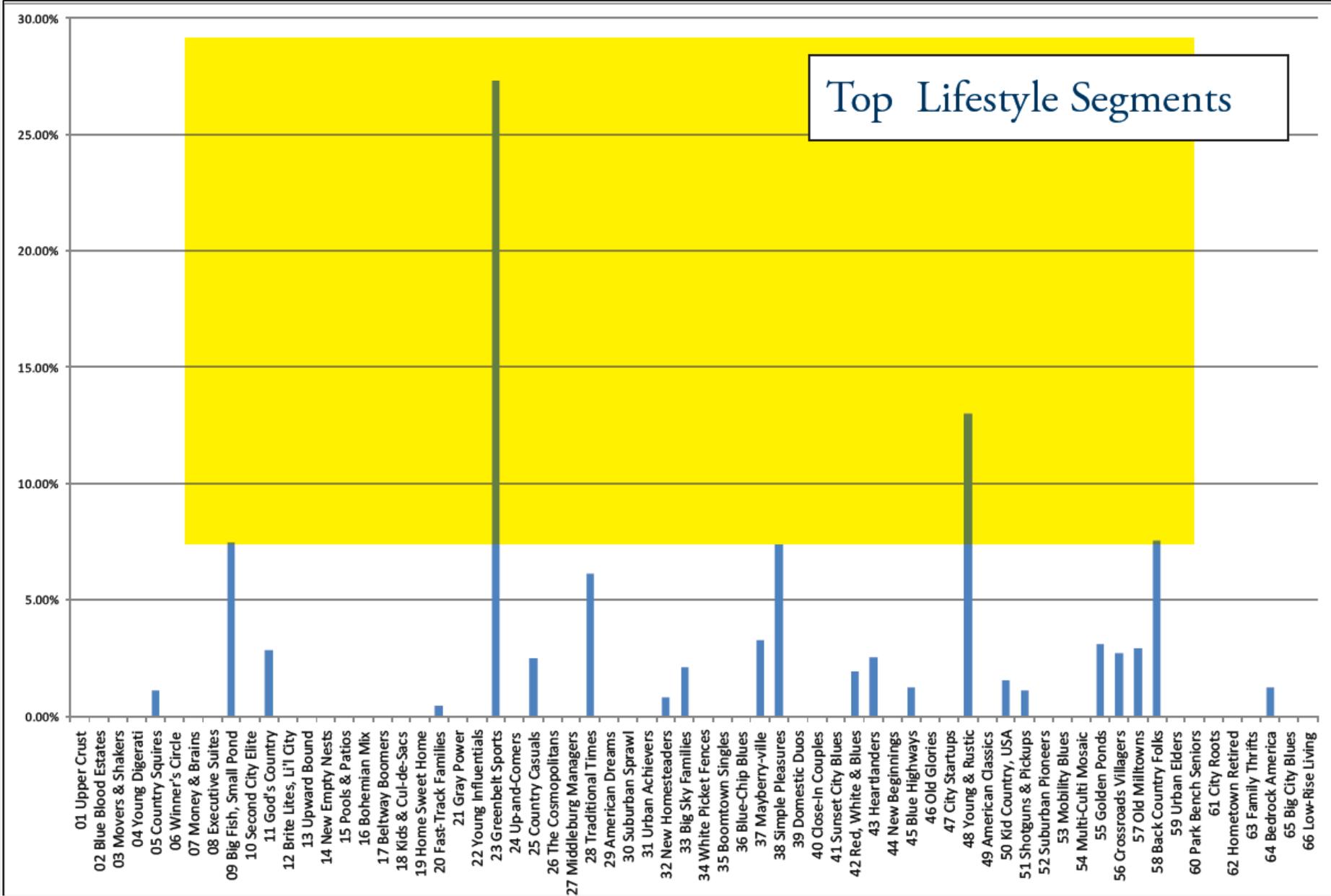
America was once a land of small middle-class towns which can still be found today among Heartlanders. This widespread segment consists of older couples with working-class jobs living in sturdy, unpretentious homes. In these communities of small families and empty-nest couples, Heartlanders pursue a rustic lifestyle where hunting and fishing remain prime leisure activities along with cooking, sewing, camping and boating.

Psychographics

Your retail trade area's psychographic profile is a breakdown into one or more of 66 lifestyle segments that identify consumer:

- Lifestyles
- Purchasing behaviors
- Media habits





23 Greenbelt Sports - 27.33%

Upper-Mid, Middle Age w/o Kids

A segment of upscale exurban couples, Greenbelt Sports is known for its active lifestyle. Most of these middle-aged residents are married, college-educated, and own new homes. And few segments have higher rates for pursuing outdoor activities such as skiing, canoeing, backpacking, boating, and mountain biking.

48 Young & Rustic - 13.00%

Lower-Mid, Middle Age w/o Kids

Young & Rustic is composed of middle age, restless singles. These folks tend to be lower-middle-income, high school-educated, and live in tiny apartments in the nation's exurban towns. With their service industry jobs and modest incomes, these folks still try to fashion fast-paced lifestyles centered on sports, cars, and dating.

58 Back Country Folks - 7.55%

Downscale, Older Mostly w/o Kids

Strewn among remote farm communities across the nation, Back Country Folks are a long way away from economic paradise. The residents tend to be poor, over 55 years old, and living in older, modest-sized homes and manufactured housing. Typically, life in this segment is a throwback to an earlier era when farming dominated the American landscape.

09 Big Fish, Small Pond - 7.46%

Upscale, Older w/o Kids

Older, upper-class, college-educated professionals, the members of Big Fish, Small Pond are often among the leading citizens of their small-town communities. These upscale, empty-nesting couples enjoy the trappings of success, including belonging to country clubs, maintaining large investment portfolios, and spending freely on computer technology.

Top 15 Lifestyle Behaviors

	Index
Order from buy.com, 1yr (A)	247
Buy from Schlotzsky's Deli, 1mo (A)	233
Buy from Hooters, 1mo (A)	231
Stay at Hilton on Vacation, 1yr (A)	217
Go Mountain Bicycling, 1yr (A)	214
Buy Auto Service at Discount Department Store (H)	213
Buy from Bob's Big Boy, 1mo (A)	212
Own Cross Country Boots/Skis (A)	204
Buy from Ponderosa, 1mo (A)	200
Order from Home Shopping Network, 1yr (A)	194
Go to Ice Hockey Games, 1+ Times, 1mo (A)	194
Use Scottrade, 1yr (A)	192
Drink Bottled Water Home Delivery, 6mo (A)	190
Buy Puma Shoes, 1yr (A)	189
Drive Recreational Vehicle (A)	188

Lifestyle Behaviors 16-30

	Index
Shop at Express, 3mo (A)	187
Order from Columbia House Music Club, 1yr (A)	186
Own/Lease New Ford Pickup (H)	182
Go Horseback Riding, 1yr (A)	182
Drive Motorcycle (A)	181
Play Racquetball, 1yr (A)	181
Buy from Papa John's, 1mo (A)	179
Shop at The Limited, 3mo (A)	179
Buy from Friendly's, 1mo (A)	178
Travel to Australia/New Zealand/South Pacific, 3yr (A)	178
Use Internet Bank (A)	177
Go Scuba/Skin Diving/Snorkeling, 1yr (A)	177
Buy 35mm Camera, 1yr (A)	177
Go Canoeing/Kayaking, 1yr (A)	174
Own Roller Blades/In-Line Skates (A)	174

Lifestyle Behaviors 16-30	Index
Domestic Travel by Motor Home, 1yr (A)	127
Shop at Wal-Mart Pharmacy, 6mo (A)	125
Buy from Long John Silver, 1mo (A)	120
Drive Compact Pickup (A)	116
Buy from Bob Evan's Farm, 1mo (A)	115
Buy from Cracker Barrel, 1mo (A)	114
Shop at Food Lion, 1mo (A)	114
Buy Home Furnishings by Mail/Phone, 1yr (A)	111
Do Bird Watching, 1yr (A)	111
Belong to a Church Board (A)	110
Order from Readers Digest Association, 1yr (A)	109
Own Cat (H)	109
Drive Van (A)	108
Own Any Real Estate (H)	107
Play Bingo, 1yr (A)	106
Lifestyle Behaviors 31-45	Index
Drive Regular Pickup (A)	104
Own Dog (H)	103
Buy Pre-Paid Calling Card, 1yr (A)	103
Internet Connection Home; Dial-up Modem (H)	101
Use Shake'n Bake, 6mo (H)	101
Domestic Travel by Railroad, 1yr (A)	101
Belong to a Veterans Club (A)	100
Use Cigarette Rolling Paper, 1wk (A)	100
Buy from KFC, 1mo (A)	99
Do Outdoor Gardening, 1yr (A)	99
Own/Lease New Chevrolet (H)	98
Bought Most Recent Vehicle (H)	98
Order from Avon, 1yr (A)	96
Do Needlepoint, 6mo (A)	93
Stay at Comfort Inn on Vacation, 1yr (A)	92

Spending Patterns Survey

1. On average, how often does your family shop in Bishop?

[Create Chart](#)

		Response Percent
Daily		13.8%
Several times per week, but not daily		57.3%
1 time per week		15.3%
Several times per month, but not every week		9.6%
1 time per month		3.9%

2. How much does your family spend each month on total retail (and restaurant) purchases?

[Create Chart](#)

		Response Percent
\$500 or less		39.2%
\$501 – 1,000		43.8%
\$1,001 – 2,000		13.8%
\$2,001 – 3,000		2.2%
More than \$3,000		1.1%

3. On average, how would you describe the pricing for retail goods and services found in Bishop?

[Create Chart](#)

	Response Percent
High	85.1%
Competitive	13.6%
Low	1.3%

4. What percentage of retail purchase does your family make outside of Bishop?

[Create Chart](#)

	Response Percent
a. Less than 10%	11.4%
11 – 20%	19.3%
21 – 30%	21.2%
31 – 40%	13.3%
41 – 50%	14.9%
More than 50%	19.9%

5. What percentage of retail purchase does your family make on the internet?

[Create Chart](#)

	Response Percent
Less than 10%	30.7%
11 – 20%	27.4%
21 – 30%	19.1%
31 – 40%	6.6%
41 – 50%	8.6%
More than 50%	7.7%

6. Other than Bishop, where does your family shop? Check all that apply.

[Create Chart](#)

	Response Percent
Mammoth Lakes	17.1%
Carson City/Reno, NV	78.8%
Ridgecrest, CA	28.3%
Lancaster/Palmdale, CA	44.8%
Internet	73.7%

7. Check the top 5 factors that influence your decision about where to do your retail shopping. [Create Chart](#)

	Response Percent
Attractiveness of shopping center or district	11.7%
Customer Service	55.6%
Boutique or specialty store availability	18.5%
Selection	78.8%
Competitive prices	89.4%
Convenient location	36.4%
Convenient shopping hours	33.3%
Many retail stores nearby	31.3%
Parking	17.0%
Restaurants and dining nearby	18.3%
Safety	8.2%

8. If there were better retail choices in Bishop, would you shop here more often?

[Create Chart](#)

	Response Percent
I'd do much more shopping here in Bishop	63.9%
I'd do a little more shopping here in Bishop	26.2%
I'd continue same shopping habits	10.0%

10. WHERE DO YOU LIVE:

[Create Chart](#)

	Response Percent
Bishop City Limits	27.6%
Greater Bishop Area	52.3%
Mammoth Lakes	0.2%
Tonopah	0.0%
Big Pine	8.8%
Independence	7.7%
Lone Pine	3.4%

11. WHERE YOU WORK: Do you work in Bishop?

[Create Chart](#)

	Response Percent
Yes	66.7%
No	33.3%

12. How many people live in your household?

[Create Chart](#)

	Response Percent
1	10.3%
2	52.0%
3	16.2%
4	13.8%
5 or more	7.9%

13. What is your highest level of education?

[Create Chart](#)

	Response Percent
High school diploma or less	9.0%
Some college, no degree	31.5%
Associate or technical degree	17.4%
Bachelor's degree	23.1%
Graduate or professional degree	18.9%

14. To what age group do you belong?

21 – 30	
31 – 40	
41 – 50	
51 – 60	
61 – 70	
71 and over	

I'd love to see an online shopping mall for all the stores in Bishop. I like to buy locally wherever possible but can't always get to the stores. To be able to shop online and have the products delivered would be great.

I do try to buy local but i also check prices. ex. I went to purchase tires it was \$230 more in Bishop vs. Walmart. When the price difference is that great I will go out of town. When I go out of town I do my weekly shopping too.

We should support those small business that are already here. Those business support the community in so many ways. Vons needs competition to bring down some of those extreme price differences between here and other rural areas

I shop the sporting goods stores in Mammoth before looking in Bishop, because Mammoth offers discounts to locals - including Bishopites. 10% is not much, but it tells me that the retailer appreciates my business. Several retailers in Bishop offer locals' discounts, and I frequent their establishments as much as possible.

I have heard many comments from out of towners in Vons who have commented on the high prices in the store. I don't special trips for shopping, but if I have an appointment I will buy my staples when I am there. Lots of the time I will spend aprox. \$100-\$150 on these trips.

This area has no retail stores for the "Big and Tall" buyers. I spend a lot of time and money online buying clothes that will fit me. You can't find anything like that in this area at all. You have to go to the city.



www.theretailcoach.net