



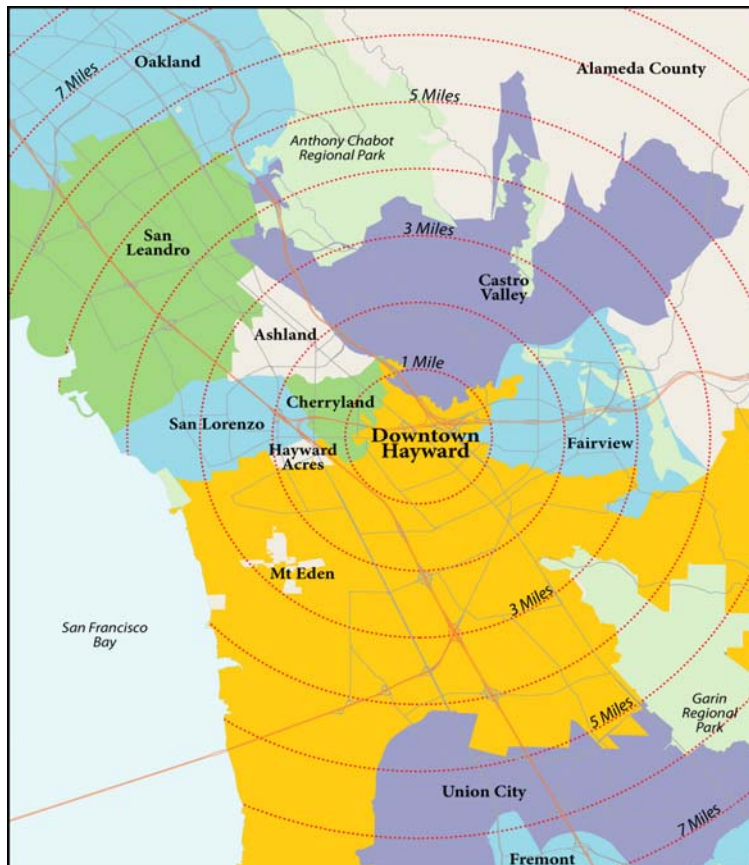
HISTORIC DOWNTOWN

Strong Market Demand for Retail Stores

Downtown Hayward offers access to an underserved retail market in major retail categories. There are unlimited possibilities for destination retail for this centrally located Bay Area City, at the hub of major vehicular and public transportation routes, a strong daytime customer base, a large and growing downtown residential population, and home to both community and state colleges.

Population of Underserved Consumers	5 Miles	7 Mile
Population	323,298	465,925
Average Income	\$77,165	\$79,407
Average Age	37	37
Male	49%	49%
Female	51%	51%
Some College to PHD Degree	54%	54%

Area Map

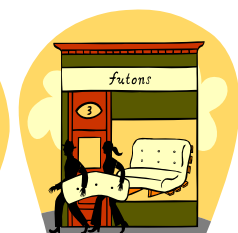


HISTORIC DOWNTOWN HAYWARD



Market Demand - 5 Mile Radius of Downtown

Opportunity Gap Retail Stores Within 5 Mile of 226600 Main Street	Demand (Consumer Expenditures)	Supply (Retail Sales)	Opportunity Gap/Surplus
Total Retail Sales Incl Eating and Drinking Places	4,712,269,724	4,464,191,652	248,078,072
Furniture and Home Furnishings Stores-442	125,709,623	113,799,709	11,909,914
Furniture Stores-4421	68,355,559	74,092,541	(5,736,982)
Home Furnishing Stores-4422	57,354,063	39,707,168	17,646,895
Electronics and Appliance Stores-443	117,283,697	93,779,753	23,503,944
Appliances, TVs, Electronics Stores-44311	89,427,590	81,889,149	7,538,441
Household Appliances Stores-443111	19,629,096	21,243,652	(1,614,556)
Radio, Television, Electronics Stores-443112	69,798,494	60,645,498	9,152,996
Computer and Software Stores-44312	23,422,513	11,785,019	11,637,494
Camera and Photographic Equipment Stores-44313	4,433,593	105,585	4,328,008
Building Material, Garden Equip Stores -444	479,331,771	354,372,197	124,959,574
Building Material and Supply Dealers-4441	435,539,418	340,351,566	95,187,852
Home Centers-44411	171,907,587	73,354,725	98,552,862
Paint and Wallpaper Stores-44412	11,564,882	9,494,272	2,070,610
Hardware Stores-44413	35,121,154	55,205,524	(20,084,370)
Other Building Materials Dealers-44419	216,945,795	202,297,045	14,648,750
Building Materials, Lumberyards-444191	75,420,141	68,985,527	6,434,614
Lawn, Garden Equipment, Supplies Stores-4442	43,792,353	14,020,631	29,771,722
Outdoor Power Equipment Stores-44421	6,449,230	2,502,212	3,947,018
Nursery and Garden Centers-44422	37,343,123	11,518,420	25,824,703
Food and Beverage Stores-445	569,649,044	581,074,022	(11,424,978)
Grocery Stores-4451	516,369,574	524,111,897	(7,742,323)
Supermarkets, Grocery (Ex Conv) Stores-44511	492,391,890	506,536,587	(14,144,697)
Convenience Stores-44512	23,977,684	17,575,310	6,402,374
Specialty Food Stores-4452	18,358,990	29,225,818	(10,866,828)
Beer, Wine and Liquor Stores-4453	34,920,480	27,736,307	7,184,173
Health and Personal Care Stores-446	207,286,299	232,692,776	(25,406,477)
Pharmacies and Drug Stores-44611	177,514,069	187,822,541	(10,308,472)
Cosmetics, Beauty Supplies, Perfume Stores-44612	7,342,540	8,022,992	(680,452)
Optical Goods Stores-44613	9,034,600	2,941,849	6,092,751
Other Health and Personal Care Stores-44619	13,395,090	33,905,393	(20,510,303)





Market Demand - 5 Mile Radius of Downtown

Opportunity Gap Retail Stores Within 5 Mile of 226600 Main Street	Demand (Consumer Expenditures)	Supply (Retail Sales)	Opportunity Gap/Surplus
Clothing and Clothing Accessories Stores-448	244,247,840	192,673,291	51,574,549
Clothing Stores-4481	173,943,174	121,086,256	52,856,918
Men's Clothing Stores-44811	10,994,792	5,749,950	5,244,842
Women's Clothing Stores-44812	44,724,390	29,357,650	15,366,740
Children's, Infants Clothing Stores-44813	9,929,176	6,623,776	3,305,400
Family Clothing Stores-44814	92,418,747	68,746,592	23,672,155
Clothing Accessories Stores-44815	4,269,665	2,094,989	2,174,676
Other Clothing Stores-44819	11,606,404	8,513,299	3,093,105
Shoe Stores-4482	32,397,951	52,059,166	(19,661,215)
Jewelry, Luggage, Leather Goods Stores-4483	37,906,715	19,527,869	18,378,846
Jewelry Stores-44831	35,129,018	18,334,901	16,794,117
Luggage and Leather Goods Stores-44832	2,777,697	1,192,968	1,584,729
Sporting Goods, Hobby, Book, Music Stores-451	91,979,280	55,574,912	36,404,368
Sporting Goods, Hobby, Musical Inst Stores-4511	62,661,840	43,848,568	18,813,272
Sporting Goods Stores-45111	30,920,352	19,385,591	11,534,761
Hobby, Toys and Games Stores-45112	19,768,304	17,277,806	2,490,498
Sew/Needlework/Piece Goods Stores-45113	5,325,786	3,394,950	1,930,836
Musical Instrument and Supplies Stores-45114	6,647,399	3,790,220	2,857,179
Book, Periodical and Music Stores-4512	29,317,440	11,726,344	17,591,096
Book Stores and News Dealers-45121	19,045,914	9,496,789	9,549,125
Book Stores-451211	18,115,257	9,091,160	9,024,097
News Dealers and Newsstands-451212	930,658	405,629	525,029
Prerecorded Tapes, CDs, Record Stores-45122	10,271,525	2,229,555	8,041,970
General Merchandise Stores-452	590,556,651	283,698,787	306,857,864
Department Stores Excl Leased Depts-4521	279,982,280	251,828,201	28,154,079
Other General Merchandise Stores-4529	310,574,371	31,870,586	278,703,785
Warehouse Clubs and Super Stores-45291	266,460,690		266,460,690
All Other General Merchandise Stores-45299	44,113,681	31,870,586	12,243,095
Miscellaneous Store Retailers-453	120,030,051	78,272,307	41,757,744
Florists-4531	8,888,159	4,011,455	4,876,704
Office Supplies, Stationery, Gift Stores-4532	48,991,544	17,376,776	31,614,768
Office Supplies and Stationery Stores-45321	27,488,673	8,065,293	19,423,380
Gift, Novelty and Souvenir Stores-45322	21,502,870	9,311,483	12,191,387
Used Merchandise Stores-4533	10,832,352	14,908,941	(4,076,589)
Other Miscellaneous Store Retailers-4539	51,317,996	41,975,135	9,342,861
Foodservice and Drinking Places-722	471,615,695	326,170,122	145,445,573
Full-Service Restaurants-7221	212,089,725	162,862,416	49,227,309
Limited-Service Eating Places-7222	199,723,502	129,635,029	70,088,473
Special Foodservices-7223	39,725,643	19,462,038	20,263,605
Drinking Places -Alcoholic Beverages-7224	20,076,825	14,210,639	5,866,186



Market Demand - 5 Mile Radius of Downtown

Opportunity Gap Retail Stores Within 5 Mile of 226600 Main Street	Demand (Consumer Expenditures)	Supply (Retail Sales)	Opportunity Gap/Surplus
GAFO *	1,218,768,634	756,903,228	461,865,406
General Merchandise Stores-452	590,556,651	283,698,787	306,857,864
Clothing and Clothing Accessories Stores-448	244,247,840	192,673,291	51,574,549
Furniture and Home Furnishings Stores-442	125,709,623	113,799,709	11,909,914
Electronics and Appliance Stores-443	117,283,697	93,779,753	23,503,944
Sporting Goods, Hobby, Book, Music Stores-451	91,979,280	55,574,912	36,404,368
Office Supplies, Stationery, Gift Stores-4532	48,991,544	17,376,776	31,614,768

Notes:

GAFO (General merchandise, Apparel, Furniture and Other) represents sales at stores that sell merchandise normally sold in department stores.

Claritas' RMP data is derived from two major sources of information. The demand data is derived from the Consumer Expenditure Survey (CE Survey) which is fielded by the U.S. Bureau of Labor Statistics (BLS). The supply data is derived from the Census of Retail Trade (CRT), which is made available by the U.S. Census.

The difference between demand and supply represents the opportunity gap or surplus available for each retail outlet in the specified reporting geography. When the demand is greater than (less than) the supply, there is an opportunity gap (surplus) for the retail outlet. For example, a positive value signifies an opportunity gap, while a negative value signifies a surplus.



HISTORIC DOWNTOWN HAYWARD



Market Demand - 7 Mile Radius of Downtown

Opportunity Gap Retail Stores Within 7 Mile of 226600 Main Street	Demand (Consumer Expenditures)	Supply (Retail Sales)	Opportunity Gap/Surplus
Total Retail Sales Incl Eating and Drinking Places	6,738,234,117	6,099,886,133	638,347,984
Furniture and Home Furnishings Stores-442	182,357,989	145,292,668	37,065,321
Furniture Stores-4421	98,889,076	88,435,327	10,453,749
Home Furnishing Stores-4422	83,468,913	56,857,341	26,611,572
Electronics and Appliance Stores-443	168,033,631	116,200,629	51,833,002
Appliances, TVs, Electronics Stores-44311	128,043,320	95,149,249	32,894,071
Household Appliances Stores-443111	28,212,924	24,437,088	3,775,836
Radio, Television, Electronics Stores-443112	99,830,396	70,712,161	29,118,235
Computer and Software Stores-44312	33,618,997	20,417,860	13,201,137
Camera and Photographic Equipment Stores-44313	6,371,313	633,520	5,737,793
Building Material, Garden Equip Stores -444	698,677,220	618,275,383	80,401,837
Building Material and Supply Dealers-4441	635,291,211	600,615,002	34,676,209
Home Centers-44411	250,131,450	268,473,722	(18,342,272)
Paint and Wallpaper Stores-44412	16,857,098	12,651,685	4,205,413
Hardware Stores-44413	50,759,728	58,383,221	(7,623,493)
Other Building Materials Dealers-44419	317,542,935	261,106,374	56,436,561
Building Materials, Lumberyards-444191	110,327,072	89,040,158	21,286,914
Lawn, Garden Equipment, Supplies Stores-4442	63,386,010	17,660,381	45,725,629
Outdoor Power Equipment Stores-44421	9,306,006	2,559,306	6,746,700
Nursery and Garden Centers-44422	54,080,004	15,101,075	38,978,929
Food and Beverage Stores-445	808,248,476	843,226,318	(34,977,842)
Grocery Stores-4451	732,956,591	730,052,050	2,904,541
Supermarkets, Grocery (Ex Conv) Stores-44511	699,239,548	703,958,428	(4,718,880)
Convenience Stores-44512	33,717,043	26,093,622	7,623,421
Specialty Food Stores-4452	26,187,784	39,600,444	(13,412,660)
Beer, Wine and Liquor Stores-4453	49,104,101	73,573,824	(24,469,723)
Health and Personal Care Stores-446	293,550,850	312,237,147	(18,686,297)
Pharmacies and Drug Stores-44611	251,208,979	260,060,553	(8,851,574)
Cosmetics, Beauty Supplies, Perfume Stores-44612	10,392,260	9,384,849	1,007,411
Optical Goods Stores-44613	12,996,028	3,775,920	9,220,108
Other Health and Personal Care Stores-44619	18,953,583	39,015,825	(20,062,242)



Market Demand - 7 Mile Radius of Downtown

Opportunity Gap Retail Stores	Demand	Supply	Opportunity
Within 7 Mile of 226600 Main Street	(Consumer Expenditures)	(Retail Sales)	Gap/Surplus
Clothing and Clothing Accessories Stores-448	355,447,721	217,433,969	138,013,752
Clothing Stores-4481	253,200,051	136,733,163	116,466,888
Men's Clothing Stores-44811	15,909,787	6,713,665	9,196,122
Women's Clothing Stores-44812	65,445,476	31,804,182	33,641,294
Children's, Infants Clothing Stores-44813	14,385,399	8,648,381	5,737,018
Family Clothing Stores-44814	134,309,335	75,128,134	59,181,201
Clothing Accessories Stores-44815	6,225,320	2,702,900	3,522,420
Other Clothing Stores-44819	16,924,735	11,735,901	5,188,834
Shoe Stores-4482	47,085,582	58,177,427	(11,091,845)
Jewelry, Luggage, Leather Goods Stores-4483	55,162,088	22,523,379	32,638,709
Jewelry Stores-44831	51,138,133	21,262,400	29,875,733
Luggage and Leather Goods Stores-44832	4,023,956	1,260,979	2,762,977
Sporting Goods, Hobby, Book, Music Stores-451	132,542,376	91,976,288	40,566,088
Sporting Goods, Hobby, Musical Inst Stores-4511	90,592,651	70,290,786	20,301,865
Sporting Goods Stores-45111	45,000,815	35,346,189	9,654,626
Hobby, Toys and Games Stores-45112	28,488,596	23,216,274	5,272,322
Sew/Needlework/Piece Goods Stores-45113	7,605,607	3,592,879	4,012,728
Musical Instrument and Supplies Stores-45114	9,497,632	8,135,444	1,362,188
Book, Periodical and Music Stores-4512	41,949,725	21,685,502	20,264,223
Book Stores and News Dealers-45121	27,372,246	17,102,529	10,269,717
Book Stores-451211	26,062,338	16,519,650	9,542,688
News Dealers and Newsstands-451212	1,309,908	582,879	727,029
Prerecorded Tapes, CDs, Record Stores-45122	14,577,479	4,582,973	9,994,506
General Merchandise Stores-452	847,378,695	432,007,091	415,371,604
Department Stores Excl Leased Depts-4521	403,855,481	388,439,878	15,415,603
Other General Merchandise Stores-4529	443,523,214	43,567,213	399,956,001
Warehouse Clubs and Super Stores-45291	380,167,464	5,003	380,162,461
All Other General Merchandise Stores-45299	63,355,751	43,562,210	19,793,541
Miscellaneous Store Retailers-453	171,316,108	113,809,226	57,506,882
Florists-4531	12,778,625	5,004,389	7,774,236
Office Supplies, Stationery, Gift Stores-4532	69,908,712	26,295,126	43,613,586
Office Supplies and Stationery Stores-45321	39,192,220	14,116,433	25,075,787
Gift, Novelty and Souvenir Stores-45322	30,716,492	12,178,693	18,537,799
Used Merchandise Stores-4533	15,609,252	17,886,749	(2,277,497)
Other Miscellaneous Store Retailers-4539	73,019,520	64,622,963	8,396,557
Foodservice and Drinking Places-722	668,002,985	467,213,122	200,789,863
Full-Service Restaurants-7221	300,269,120	226,213,396	74,055,724
Limited-Service Eating Places-7222	283,189,330	197,388,785	85,800,545
Special Foodservices-7223	56,340,472	26,546,840	29,793,632
Drinking Places -Alcoholic Beverages-7224	28,204,063	17,064,101	11,139,962
GAFO	1,755,669,125	1,029,205,770	726,463,355
General Merchandise Stores-452	847,378,695	432,007,091	415,371,604
Clothing and Clothing Accessories Stores-448	355,447,721	217,433,969	138,013,752
Furniture and Home Furnishings Stores-442	182,357,989	145,292,668	37,065,321
Electronics and Appliance Stores-443	168,033,631	116,200,629	51,833,002
Sporting Goods, Hobby, Book, Music Stores-451	132,542,376	91,976,288	40,566,088
Office Supplies, Stationery, Gift Stores-4532	69,908,712	26,295,126	43,613,586

HISTORIC DOWNTOWN HAYWARD



Trade Area Demographics 3 to 7 Miles of Downtown

Target Area Demographics	Within 3 Miles	Within 5 Miles	Within 7 Miles
2006 Estimates	of Downtown	of Downtown	of Downtown
Target Area Population	206,374	323,298	465,925
Male Population	102,157 (50%)	156,876 (49%)	224,935 (49%)
Female Population	104,217 (50.5%)	161,546 (51%)	224,935 (51%)
Average Age	36	37	37
Average Household Income	\$73,303	\$87,617	\$89,483
Largest Population Segments			
25-34	29,855 (15%)	43,743 (14%)	62,184 (16%)
35-44	32,822 (16%)	50,171 (16%)	72,168 (16%)
Largest Segments by Marital Status			
Never Married	47,750 (30%)	70,599 (28%)	101,697 (29%)
Married, Spouse Present	73,107 (46%)	119,775 (48%)	173,156 (49%)
Largest Segments by Education			
Some College to PHD Degree	68,535 (51%)	111,603 (54%)	141,091 (54%)
Largest Segments by Household In-			
\$50,000-\$74,999	15,116 (22%)	22,913 (21%)	30,917 (21%)
\$75,000-\$149,999	20,316 (30%)	33,248 (31%)	48,159 (32%)
Largest Segments by Household Type			
Single Male & Female	15,277 (22%)	23,623 (22%)	31,164 (21%)
Married Couple, with Children	17,134 (25%)	26,917 (25%)	39,383 (26%)
Married Couple, own Children	16,116 (23%)	27,363 (26%)	38,838 (26%)
Largest Segments by Household Size			
1 Person Household	15,227 (22.1%)	23,585 (22%)	31,164 (21%)
2 Person Household	19,694 (29%)	31,124 (29%)	42,464 (28%)
Largest Segment by Class of Workers			
For-Profit, Private-Sector	72,495 (76.%)	112,804 (76%)	160,843 (76%)
Largest Segment by Occupation			
Sales & Office	28,527 (30%)	44,682 (30%)	62,208 (29%)
Largest Segment by Classification			
White Collar	56,566 (14%)	90,492 (61%)	30,457 (61%)

For More Information About the City of Hayward's Downtown Retail Attraction Program

Call: Gloria Ortega at (510) 583-4262 or email: gloria.ortega@hayward-ca.gov