

Project Report
Retail Positioning and Marketing Materials

Prepared for
City of Calimesa
Calimesa, CA

Submitted by
**Economics Research Associates, an AECOM
company (ERA)**

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I. Retail Strategy

Residential foreclosures are currently soaring in the Inland Empire and new development has halted throughout the nation. With current reduced consumer spending, new development may be difficult for the next couple of years. However, now is an excellent time to develop the infrastructure, construct the environment, attract the key non-retail tenants, and to build the identity that will be necessary to make a successful downtown.

Several steps need to be taken before Calimesa can attract the caliber of retailers appropriate for a downtown and, by planning and laying the foundations of a successful downtown now, Calimesa will be well positioned to leverage improvements in the economy across the next two to five years.

In this section, ERA summarizes general downtown retail positioning strategies and recommendations tailored to Calimesa Boulevard. First, we describe general downtown development theories, reviewing retail consumption concepts and the elements of a successful district. Next, we review current conditions along Calimesa Boulevard, current plans, and challenges and opportunities. Focusing in on strategies for improvement, we first take a big picture view of the overall strategy for revitalizing the district, then we key in on potential retail positioning strategies and, in the Recruitment Strategy section, we discuss who needs to be involved in the retail positioning. Finally a list of simple recommendations is laid out.

Together this Retail Strategy section and the next section, Tenant Profiles, provide a guideline to assist in improving the competitive economic position of the downtown Calimesa area and identify types of uses that will add additional strength and viability to the downtown.

Background

The community has indicated the desire to make the downtown corridor into a more attractive destination that will fill a vital commercial and cultural niche for the City of Calimesa. Based on a survey developed by the General Plan Update Committee conducted in 2004, the majority of local residents patronize nearby cities to satisfy their retail needs. The survey also indicated that residents desire local entertainment and shopping and believe that Calimesa Boulevard should be the location of future commercial activity in the community. However, the downtown corridor lacks some of the critical components in terms of its infrastructure and layout to serve as a true town center or destination district. Upcoming updates and implementation of the Calimesa Boulevard Corridor Plan are intended to address these issues and expand the corridor's role as a destination for retail and pedestrian activity.

There are several structural approaches that can be used for creating successful districts and downtowns, a few of which are based on the experience that single-property owners have undertaken in creating commercial developments, such as a master planned town center projects. In fact, some of the most successful retail districts in cities nationwide have used these approaches to create a cohesive sense of place that has been used and leveraged to create new economic opportunities. Examples within the greater Los Angeles area include Caruso Affiliated projects such as the Grove or the Americana at Brand (single-property owner) and Old Town Pasadena (public/private). Incorporating strategies from master planned commercial developments is a potentially very powerful approach for creating downtown districts in communities.

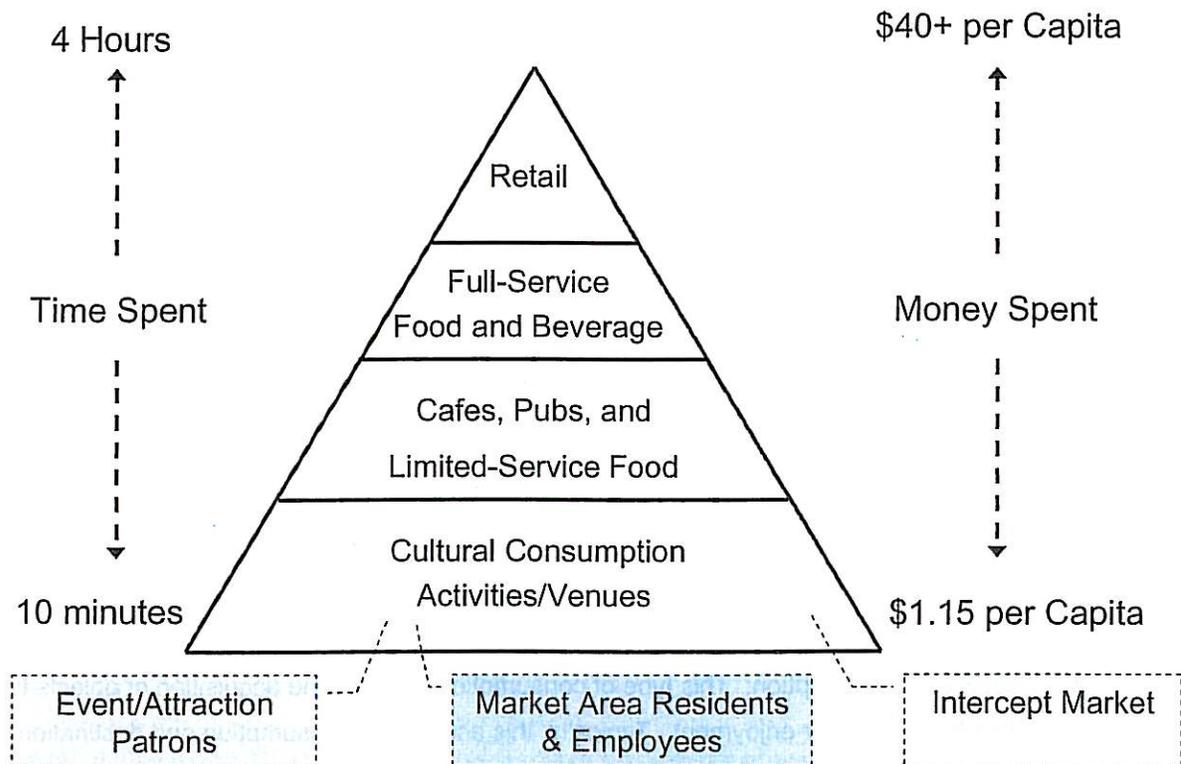
Generally, successful districts tend to offer a combination of interrelated modes of consumption that are available to consumers. These key activities include:

- **Experiential consumption:** This is a form of commercial entertainment or cultural activities that are ephemeral yet pleasurable. They can range from typical mass entertainment activities such as movie theaters or farmer's markets to very specific niche oriented entertainment experiences offered by cultural facilities.
- **Literal consumption:** This is a consumption of food and beverage that is designed to be eaten within the district. This type of dining consumption can range from small, limited service cafes and ethnic restaurants, to nationally-recognized brands and/or fine dining experiences.
- **Acquisition consumption:** This type of consumption includes the acquisition of objects to be taken home for later enjoyment. Typically, this acquisition consumption and destination district focuses on discretionary expenditures rather than meeting daily or existential needs.

A successful destination district is able to meet these consumption needs of a potential consumer in the most efficient manner as possible. Although successful areas that fill these functions can develop organically over a long period of time, typically they require some combination of public/private partnership to catalyze private investment. These partnerships can be used to either plan private investment to provide specific pieces of public infrastructure that can serve as activators within a district. These potential activators can range from cultural facilities, serving as an entertainment draw, but they also typically include pieces of hard infrastructure such as parking or public spaces that bring focus and access into a district. The goal of these actions is to create inviting and energized environments, which can operate as a specific destination within a city.

Table 1 illustrates, in schematic form, a conceptual framework that can be used to understand how these districts can be constructed. The pyramid of potential uses, illustrated as a theoretical model, outlines the progression of commercial development within a downtown district and demonstrates how a mix of these uses tends to attract more consumers who stay longer and spend more money with each visit.

Table 1: Downtown District Planning



Source: ERA

At the bottom of the pyramid, there are three groups of existing and potential customers for goods and services that are offered within the district. These include entertainment patrons, residents and office workers, as well as visitors from outside the immediate region (intercept market). The left hand scale shows the amount of time a visitor is likely to spend in a district or on the project site, ranging from a short walk between a parking lot and the destination up to a four-hour stay. The right hand scale indicates an approximate amount of money that is spent within the district on a per capita basis. The pyramid itself shows how different types of activities can eventually be developed to create market support for greater additional levels of activity.

Level 1

The first phase of development occurs after the creation of attractive pedestrian activities which can either occur in the evening tied around special events or could take place during the day being catalyzed by cultural venues and community institutions such as libraries. These represent the core basis for activating activities for an entire district.

Levels 2 and 3

The next level of the pyramid includes cafes and pubs with limited food service (e.g. a place where people can stop for a cup of coffee or a drink with friends). These activities lengthen a visitor's stay within the area. These can serve to energize the street with additional foot traffic making the experiences in the area more enjoyable and diverse. Over time these uses may evolve into full-service food and beverage establishments which represent the third level of the pyramid, and typically include more formal restaurants that may eventually support more turnover per table and higher expenditure per patron.

Level 4

Finally, at the top of the pyramid, and the final piece of development within a district over time, is retail. Specifically, the type of retail that works best in this environment is specialty retail that is centered on discretionary spending including such items as gifts, art, books, music, and some clothing. This type of shopping in and of itself has become a major form of entertainment in our society.

Building the Successful Downtown Pyramid

The progression may occur naturally within a downtown area or, as in this case, it can be planned as part of an overall development strategy. This strategy is most successful where a sense of place is established and the pedestrian orientation is at the center of the strategy. Likewise, the tenant plan or set of users that are brought into the area needs to be carefully managed and monitored.

The plan must insure that complementary land uses help re-enforce and create zones of consumption without establishing conflicting land uses that would be inappropriate or potentially disruptive. In the case of downtown Calimesa these would include auto-oriented businesses that would detract from the intended pedestrian orientation. Also, traditional large-format retailers are inappropriately scaled for a traditional downtown development pattern should also be discouraged in the designated downtown area.

Current Conditions

The Calimesa Boulevard corridor is approximately 4,200 linear feet from County Line Road to Sandalwood Drive. ERA estimates that approximately 63 businesses are located adjacent to Calimesa Boulevard. Roughly 41 percent of the establishments generate taxable sales and 59 percent of the other tenant types provide professional and personal services. Based on year-end 2008, these retail establishments (excluding gas station sales) generated \$35 million in sales.

The mile long corridor currently does not feel like a cohesive downtown area. With no amenities that relate to pedestrian activities, the retail orientation of the corridor is strictly automotive based. Fast food locations and existing gas stations derive the majority of sales from the intercept market coming from the I-10 freeway. However, there are a limited number of retail and personal service locations that are oriented to the local community. Unfortunately, the existing development pattern—large scale of the corridor and four lanes of traffic—does not foster an environment that invites customers to linger. As such, the downtown area functions as a traditional corridor that does not have a strong sense of identity.

While the configuration of Calimesa Boulevard is evolving, preliminary urban design work by the Planning Center has identified areas within the corridor that could focus on three different types of development.

- **Visitor-Serving Commercial:** This node would focus in and around the intersection of Sandalwood and Calimesa at the southern tip of the corridor. The existing fast food and gas stations would continue to be oriented towards the intercept market from the freeway and larger region.
- **Neighborhood/Community Serving Commercial:** This node would include the existing Stater Brothers development as well as the new construction of the Shoppes at Calimesa. The orientation of these retailers would be likely within the primary and secondary market areas and maintain the existing automobile orientation along the adjacent areas of the corridor.
- **Downtown Commercial Area:** This node would focus on a smaller area between K Street and L Street with new road configurations and open space to establish a mix of specialty and civic uses.

ERA believes this approach is appropriate to bifurcate the downtown corridor. Creating a smaller downtown district with more intense development will help create a sense of place. The following

strategies and recommendations are based on the assumption that desired retail and new development would be focused in the designated downtown area.

Challenges/Opportunities

Opportunities

- Broad spectrum of housing at varying price points;
- Opportunities for infill development on under utilized properties in the downtown area;
- Downtown corridor is located within a redevelopment project area;
- Recent population growth;
- A potential change in the demographic profile in the community over time due to planned residential development (22,000 homes);
- Retail sales leakage that can be repatriated to Calimesa;
- Few pedestrian-oriented districts in the primary and secondary market areas; and
- Direct freeway access at both ends of the downtown corridor.

Challenges

- Moderate incomes in the three mile market shed;
- A high share of seniors in the neighborhood and community market areas with fixed incomes;
- Four lanes of traffic flowing through the downtown corridor;
- Existing presence of industrial land uses and piecemeal development pattern along the corridor;
- Lack of pedestrian friendly infrastructure (sidewalks, crosswalks, scale of existing blocks etc.)
- Proximity to freeway without existing buffer;
- Automobile orientation of corridor; and
- Potential competition from the new planned commercial development.

Downtown District Building Strategies

Without improvements to Calimesa Boulevard, attracting credit tenants appropriate for a downtown setting will be extremely difficult. Retailers who would consider the area will likely be oriented to the regional market based on existing access to the I-10 and the auto orientation of the boulevard. While these retailers are desired in the City, they are not appropriate tenants for a downtown district.

Based on preliminary urban design work by the Planning Center a node of downtown activity could occur in an area between K Street and L Street. Changes to the existing environment would include new road configurations and open space.

The creation of pedestrian friendly environment with a mix of complementary land uses (entertainment, retail, and civic uses) will help create a zone of consumption. Once these improvements are underway, ERA believes a focused "catalytic" development that can attract one or more desired anchor tenants is essential for the overall downtown retail strategy to be successful.

The inclusion of local independent operators in the overall retail strategy is also critical. Independent local operators create a commercial district's unique identity. Establishing a market niche will distinguish the downtown district from new commercial developments planned to occur in the region. However, independent small businesses often have the fewest resources, pay the lowest rents, and are the riskiest tenant types. As a result, they are not actively pursued by commercial developers or brokers and will have to be pursued by other means.

Retail Positioning

The downtown corridor is large enough to support a limited commercial district along Calimesa Boulevard. However, if the district wants to penetrate the greater regional market and position itself to compete with future lifestyle shopping center developments¹ it is critical that the district establish a distinct market image and niche. The opportunity exists to prepare for this transition given the population changes that are projected in the near future and current planned improvements along Calimesa Boulevard.

Based on the market analysis, the retail gap analysis, the City's stated goals and objectives for Calimesa Boulevard, and the consultant team's experience, the following commercial concepts are recommended. ERA believes that establishing the proposed downtown area and differentiating its

¹ Lifestyle shopping centers are oriented to affluent residential neighborhood and have an upscale orientation. They normally consist of a large number of tenants specializing in women's clothing, restaurants, family apparel, home furnishings, and limited personal services.

identity from the rest of the corridor is of the utmost importance initially. It is necessary to develop the downtown in order to be competitive with future large scale retail developments.

➤ **Food, Cultural, and Entertainment District**

A cluster of restaurants in a pleasant pedestrian-oriented environment would be unique in the city and would distinguish the downtown from the chain restaurants in new shopping centers in the region. Some businesses may become combination food stores, bakeries, delicatessens, and catering operations.

The cultural and entertainment elements would complement dining and specialty food elements. Cultural and entertainment activities may include an art & education center, film venues, and entertainment within restaurants, and special cultural events. For this concept to reach full potential, it may be necessary for restaurants be allowed to serve alcoholic beverages and have live entertainment, which may require modification to existing City policies.

➤ **Main Street and Personal/Business Services**

The downtown corridor should establish its role as a "Main Street" for personal and business services, and general commercial outlets to service city's residents and businesses. These uses include hairdressers, barbers, fitness, dry cleaners, bakers, etc.

➤ **Residential/Office/Retail Mixed-Use**

Office uses should be encouraged within future mixed-use development projects in the downtown corridor (as upper level uses). Professional, financial, and medical services would generate most office demand. The City could encourage local non-profit organizations, arts organizations, and public service organizations to locate in the downtown area.

Mixed-use residential projects should be pursued within the surrounding areas. Increased consumer density will enhance district business and will create a truly pedestrian-oriented village environment. Housing that is integrated with the district will contribute to the area's vitality and extend hours of activity.

➤ **Other Specialty Stores**

Other specialty stores should also be interspersed throughout the downtown area. These may include specialty bookstores, coffee shops, and other specialty food and beverage outlets.

Recruitment Strategy

The recruitment strategy will require the following entities to coordinate their efforts:

- The Redevelopment Agency
- Property Owners/Developers
- Commercial Brokers
- A Downtown Recruitment Coordination Group (recommended)

While the four entities' roles overlap, each should have the following primary responsibilities:

- The Redevelopment Agency's primary recruitment responsibility is to assist property owners to improve their properties and to attract developers to the district.
- Selected developers' primary recruitment responsibility is to attract anchor tenants to their developments, most likely credit tenants.
- Commercial brokers' primary recruitment responsibility is to attract credit tenants to new development projects and vacant commercial space within the district.
- Downtown Recruitment Coordination Group's primary role is to coordinate and monitor overall marketing initiatives, assist the above entities with their marketing efforts, and specifically recruit selected independent commercial operators to the downtown area. Its board should include a representative from each of the following groups: Merchants, restaurateurs, property owners/developers, small-business lenders, commercial brokers, and Redevelopment Agency staff.

The concepts recommended require targeted recruitment of the following entities:

- Developers
- Small scale national credit tenants
- Independent local operators
- Existing businesses

The strategy should target all four groups. The corridor is not in a strong position to attract additional national credit tenants to the downtown area without greater market confidence in the level of new private investment in the area. Private retail developers of new projects, on the other hand, will require credit tenants in order to secure financing. Small developers, which might finance a project for independent tenants, will have to provide more equity or personal guarantees. Market rents for existing space in the district are consistent with the typical modest sales potential of independent operators, who are important for creating the unique commercial district that is recommended. Local businesses that meet the city's objectives and want to expand are an important "homegrown" source of tenants.

Therefore, the recommended recruitment strategy has the following elements:

- Recruit developer for selected "catalytic" new project in a key anchor location to create a critical mass of new investment activity, and to draw small scale credit tenants to the downtown corridor.
- Recruit independent operators to utilize existing and new commercial space within the district.

Recommendations

The following is a summary of general recommendations to attract desired retail tenants to the downtown area.

Recruitment Tools

The basic marketing materials should include a marketing flyer with appropriate city contact information as well as a web page.

Area Identity

The moniker "Downtown" is not descriptive given the existing conditions. "Downtown" to the common consumer means a major hub of business activity unless followed with the name of the suburban city. It is important to create a descriptive name for Calimesa's downtown that will define it as "different." A theme is not recommended; rather, simple language that better describes the area is suggested. For example, "Third Street Promenade" in Santa Monica, "Old Pasadena" in Pasadena, "State Street" in Santa Barbara, and the "Gaslamp District" in San Diego are all located within their respective cities' downtowns, but have their own regional identities.

Infrastructure

The existing infrastructure is inadequate. Efforts currently underway will address these problems to promote the pedestrian friendly environment and enhance storefront visibility.

Strengthen Linkages

Calimesa Boulevard's environment and sense-of-place could be enhanced through better connections between the various proposed districts and civic areas. Connecting these locations will promote a sense of community and enhance retail opportunities. Additionally, this investment will demonstrate the City's commitment to the area's revitalization and thereby will increase private sector investment in the downtown corridor.

Signage

The city should modify the sign ordinance for Calimesa Boulevard, if necessary, to allow more creative and dynamic signage that is consistent with the goal to create a dining, entertainment, and cultural market image. Also, the corridor should have limited signage that project over the sidewalk at a smaller pedestrian scale.

Markets/Festivals

The city should consider establishing a series of regular events in open spaces along Calimesa Boulevard. Other cities have established farmer's markets, art fairs, or general markets that help create activity and draw people to the downtown area.

Potential Complementary Developments

Successful redevelopment in the downtown district should consider the inclusion of higher-density housing in the nearby area. Multi-family housing may occur as new infill development, redevelopment of selected parcels. The areas in and around the downtown corridor can be developed at a lower density "village" scale. Redevelopment Agency participation may be required. Public investment in parks and schools would help encourage and support more housing.

II. Target Tenants

Retailers' location needs are fairly straightforward. They want to be where commercially zoned land is available near people with quality jobs. In fact, most retailers can analyze the market with basic demographics. This includes the number of households and median income level within the three and five mile radii of a prospective site. Other important information includes site considerations such as traffic counts and available land. In most cases, market consideration take precedence over site conditions because without demand for what the retailer sells the availability of a good site is irrelevant. If an area demonstrates potential demand (e.g. enough people and money within a given market shed) then retailers will consider the location. Each retailer will have different demographic site criteria and co-location preferences based on the goods sold.

The City of Calimesa must consider the existing opportunities and challenges to attract desired tenants. In areas with less attractive demographics the public and private sector will have to work harder to improve conditions to attract desired retailers than in more affluent communities. Based on ERA's market analysis there is a significant amount of retail leakage that can be recaptured in the primary market area. Positioning the area as "underserved" is desirable to attract retailers to the location. Future retail downtown tenants will also likely be attracted to the area due to the proximity to the I-10 freeway (accessible to the region), recent and projected household growth, and higher than average household income levels in the city and 5 mile radius of the downtown corridor.

Based on the general strategies previously presented in this Section, ERA has included a list of potential retailers to target for the downtown corridor. The following presents a set of potential retailers grouped in general categories. After a brief discussion of the base demographic and sizing requirements the name of a target retailer and contact information is provided. Each of the selected retailers is looking to expand operations in California in the next three years.

This list is not intended to be comprehensive or definitive, but rather to illustrate some potential tenants that could be pursued to promote the goals and strengthen the desired downtown identity. Some of the tenant requirements do not match the existing demographic profile. This does not suggest that the city should limit itself with humble goals. It merely means that the city needs to compare what is possible with what is desirable and then pursue the most appropriate match. Attracting desired tenants to the downtown area will be an ongoing process. This list is intended to be a starting point for consideration.

Coffee

Major coffee shops include national franchises such as Starbucks, but could also include an independently operated facility. The general demographic requirements for national retailers include a high number of daytime workforce population (50,000 in one mile radius) or high average daily traffic counts (around 30,000). Sizing requirements are flexible, but usually range between 1,000 and 1,500 square feet. Using a national database, one appropriate retailer would be "It's A Grind". It is estimated that they plan to grow by approximately 25 stores a year during the next 2 to 3 year time period. Currently, they operate 136 stores primarily in California. They prefer to orient themselves with a slightly younger demographic, but proposed changes and a lively downtown environment would increase the chance of attracting them. The company tends to lease (10 years with options) their properties and prefers 200 plus square feet of patio seating.

Contact Information

Jane Bartylla
It's A Grind
Real Estate Administrator
6272 East PCH
Ste. E
Long Beach, CA 90803
(562) 594-5600
libartylla@itsagrind.com

Juice

Major juice franchises include Jamba Juice and Robecks. The general population requirements range from about 35,000 to 45,000 within a two mile radius with associated average income around \$50,000. Regional and national operators typically utilize approximately 1,200 square feet of floor space. "Juice It Up!" could be a potential candidate in the downtown area. With 130 stores, the business is looking to add 50 stores in the next year and 400 total in the next 48 months. Current demographic preferences include a population of 15,000 within a mile of the site location and average earnings of approximately \$75,000. The business also prefers a high average daily traffic count in the area of 30,000. They prefer to expand into areas with heavy pedestrian foot traffic and accessible short term parking.

Contact Information

Larry Sidoti
Juice It Up!
Vice President of Business Development
17915 Sky Park Circle
Ste. J
Irvine, CA 92614
(949) 475-0146

larrys@juiceitup.com

Ice Cream / Frozen Yogurt

In general, ice cream or frozen yogurt chains have similar demographic requirements of both coffee and juice related businesses. There is a heavy emphasis to be located in high traffic areas (either pedestrian or auto) with great visibility. An emerging trend is the rapid expansion of frozen yogurt chains that have become popular in the last 3 years. At this point, it is difficult to determine if this is passing trend but the increasing importance of health related issues should help sustain these businesses in the long term. Frozen yogurt companies have leveraged this recent success and expanded rapidly, especially in areas within Southern California. One potential candidate is "Yogurtland." The existing floor plate is between 1,000 and 1,600 square feet. The business searches to find affluent areas in pedestrian friendly environments with a consumer base with a college level of education. Like competitive companies such as Red Mango or Pinkberry, there is a heavy emphasis on design.

Contact Information

Ira Spilky
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Ste. 600
Los Angeles, CA 90064
(310) 558-3241
ira@irapilky.com

Specialty Sandwich

Sandwich specialty shops tend to locate in areas that have a high daytime population, doing the majority of their business in the lunch hours. For this reason, attracting a specialty sandwich shop is likely difficult given the existing conditions in the downtown corridor. However, establishing a convenient daytime attraction would be beneficial to give the district activity throughout the day. The establishment of a specialty sandwich shop would likely complement the "fast food" nature of the proposed Subway at the Shoppes at Calimesa development. One emerging specialty sandwich shop is the "Spicy Pickle". There are currently 42 stores and the business is planning on expanding their operation by 26 stores in the next year. They requires between 1,500 to 2,000 square feet of floor space. Another option could include "Panera Bread." The specialty food retailer requires a larger footprint (approximately 3,500 square feet) and plans for moderate expansion in the next three years. The retailer currently seeks to locate within two miles of a 30,000 population base with an average income of \$50,000. The combination bread bakery and sandwich shop typically includes free WiFi and a coffee shop like atmosphere that encourages extended duration of visits. Panera Bread serves breakfast, lunch, and dinner.

Contact Information

Marc Geman
Spicy Pickle
CEO
90 Madison St.
Ste. 700
Denver, CO 80206

Seth Parker
Panera Bread
Senior Real Estate Manager
6737 N. Milburn Ave.
Ste. 160
Fresno, CA 93722
(559) 682-3754
seth.parker@panerabread.com

Unique Restaurant

There are a number of smaller national chains looking to expand throughout Riverside County. The preferred demographic target is generally 30,000 population base within 2 miles with an average household income of \$50,000 to \$60,000. With the planned Denny's at the southern end of the corridor, ERA believes the addition of a specialty restaurant that is family oriented would be appropriate. There are a number of potential candidates for this targeted group. Two restaurants are "Dickey's Barbecue Pit" or "Noodles and Company." Dickey's requires between 1,400 and 2,000 square feet of space while Noodles and CO desires between 2,400 and 2,600 square feet for their operations. Dickey's plans to add 65 stores in the next 12 months to their existing 122 locations. Similarly, Noodles and Co seeks to increase their operation from approximately 200 to 250 restaurants in the next year.

Contact Information

Tom Dose
Senior Sales Associate
360 N. Sepulveda Blvd.
Ste. 1020
El Segundo, CA 90245
(310) 252-7656
tom@rnlp.biz

Jeff Drew
Broker
12526 High Bluff Dr.
Ste. 210
San Diego, CA 92130
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jdrew@retailinsite.net

Others to Consider

The following tables present other potential tenants within the aforementioned retail categories as well as in other areas of interest such as amusement and recreation, general merchandise retailers, personal and medical services, and some mid-box retailers. Clearly, many of these potential retailers do not align with the desired downtown retail profile. However, some may be appropriate to target as the downtown evolves and the neighborhood/community serving commercial district becomes developed.

Table 2: Additional National Credit Tenants**Amusement / Recreation**

Anytime Fitness
 Jenny Craig
 LA Fitness
 Weight Watchers
 24 Hour Fitness Sport
 AMC Theatres
 Harkins Theatres
 Laser Quest

Food

Applebee's
 Chilis
 BJ's Restaurant & Brewery
 Buffalo Wild Wings
 Corner Bakery Cafe
 Daphne's Greek Cafe
 HomeTown Buffet
 Johnny Rockets
 Marie Callender's Restaurant & Bakery
 T.G.I. Friday's

Quick Serve Food

Baja Fresh / Poquito Mas
 Baskin Robbins
 California Roll & Sushi
 Cold Stone Creamery
 L & L Hawaiian Barbecue
 Panda Express
 Round Table Pizza
 SanSai Japanese Grill

General Merchandise Retailers

Anna's Linens
 Big 5 Sporting Goods
 Sally Beauty
 Aaron Brothers Art & Framing
 Discount Party Stores
 Dress Barn Outlets
 General Nutrition Center
 Half Price Books
 Happy Nails and Spa
 HobbyTown
 HoneyBaked Ham Company and Café
 Kay Jewelers
 Lids/Hat World
 Ritz Camera
 Motherhood Maternity Outlet
 Party City
 Payless ShoeSource
 Sunglass Hut
 The Athlete's Foot (TAF)
 Ziba Beauty

Personal / Medical Services

Pearle Vision
 Physicians Immediate Care
 Pacific Dental Services
 Western Dental

Medium Sized Box Stores

Ross Dress For Less
 T.J. Maxx
 Men's Wearhouse
 Michaels Arts & Crafts

Source: ERA

Table 3: Additional Tenants

Category / Retailer	Demo Mile Range	Demo Pop Mln	Demo Avg. Illi Income	Demo Traffic Count	Customer Base Comments	Other Customer Base Comments	Min SF	Max SF	Co-Tenants	Comments	Facility Preference
Apparel Lids/Hai World	10	250,000	\$30,000		The company serves the core sports fan and fashion-conscious, trend-savvy mid-teen to mid-20s customer.		700	2,000			Campus Site, Downtown, Keck, Neighborhood Strip, Outlet Mall, Regional Mall, Regional Strip, Special Strip, Transit Terminal
Motherhood Maternity							1,500	2,000		Prefers Moderate Regional Malls, Strips and Power Centers and Central Business Districts.	Strip
Men's Warehouse	5	300,000				Minimum population of 150,000 (small store concept) / 300,000 (typical store concept). Prefers middle to middle-upper household income and significant traffic count in demographic area.	4,500	6,000	Prefers other national eat good retailers, department stores, electronics.	Regional Areas Only / Pad site at main entrance to center. Prefers 4,500 sq. ft. for small store concept and 5,500-6,000 sq. ft. for typical store concept.	Free Standing, Neighborhood Strip, Power Center, Regional Mall, Regional Strip, Special Strip
Dress Barn Combination Stores	5	120,000	\$55,000		Women sizes 2 to 24 and Petite.		7,000	8,000	Discount department stores, grocery/supermarkets, fashion anchor, and other soft goods retailers.	Requires a minimum of 70 feet of footage (Prefers 300). Needs a dominant presence in shopping center (center size: min. 150,000 sq ft GLA). Downtown locations are for metro areas only.	Downtown, Lifestyle Center, Neighborhood Strip, Outlet Mall, Power Center, Regional Strip, Special Strip
Bakery Corner Bakery Cafe					Strong daytime population with moderate to strong residential demographics.		3,000	4,000	Good retail synergy.	High exposure and caps in shopping centers with a strong lunchtime crowd. Abundant parking and outdoor patio seating.	Lifestyle Center, Neighborhood Strip, Outlet Mall, Power Center, Regional Strip, Special Strip
Beauty/Supplies Sally Beauty						Small cities (population 25,000 in a 5-mile radius), Metro areas (50,000 - 50,000 in a 3 mile radius or 100,000+ in a 5 mile radius). Average household income between \$34,000-\$72,000. Minimum 20,000-30,000 cars per two-way traffic in front of shopping	1,200	1,600	100,000 square foot shopping center anchored by at least one major tenant (i.e. major grocer, discount store, clothing or department store chain).	Excellent position within the shopping center, excellent access and visibility to the shopping center. Minimum 20 feet of footage. Prefers to keep stores three miles apart but may be positioned closer depending upon area density.	Free Standing, Lifestyle Center, Neighborhood Strip, Power Center, Regional Strip
Cameras / Video Equipment Ritz Camera	5	150,000	\$55,000	40,000	Median household income \$60,000 and median population of 60,000.	Heavy traffic count.	1,600	3,000	Entertainment, Upscale, Fashion, Grocery/Supermarket and Big Box Retailers.		Downtown, Free Standing, Lifestyle Center, Neighborhood Strip, Power Center, Regional Mall, Regional Strip, Special Strip
Crafts / Supplies Michael's Arts & Crafts	5	100,000	\$35,000	25,000			20,000	21,000	Prefers to be in or near Big Box Power Centers.	Prefers 21,300 square feet.	Free Standing, Neighborhood Strip, Power Center, Regional Strip, Special Strip
Department Store T.J. Maxx					Target customer base are consumers in the middle to upper-middle income bracket and generally fit the profile of a department store shopper.		29,000	31,000	Can exist within a superstore/combo store format with HomeGoods.	T.J. Maxx continues to add stores to its store base across the country. Average size is 30,000 square feet.	Free Standing, Lifestyle Center, Regional Strip, Special Strip
Discount Department Store Ross Dress For Less	5	100,000		30,000	25-54 year old white collar shoppers from primarily middle income households.		29,000	31,000		Prefers 30,000 sq. ft.	Free Standing, Neighborhood Strip, Regional Strip, Special Strip
Eye Care / Eyewear / Sunglasses Pearle Vision	5	60,000		35,000			2,500	3,000			Downtown, Free Standing, Lifestyle Center, Neighborhood Strip, Power Center, Regional Strip, Special Strip
Sunglass Hut	5	60,000		35,000			800	1,200			Downtown, Free Standing, Lifestyle Center, Neighborhood Strip, Power Center, Regional Strip, Special Strip, Transit Terminal

Category / Retailer Food or Beverage Specialty	Demo Millio Range	Demo Pop Min	Demo Avg. HHI Income	Demo Traffic Count	Customer Base Comments	Other Customer Base Comments	Min SF	Max SF	Co Tenants	Comments	Facility Preference
Baskin Robbins		15,000	\$40,000	25,000	Residential population: 15,000 residents within three minute drive time. Suburban: 25,000 within a five minute drive time. Daytime population: 10,000 within 3 minute drive time-5 minute drive time in Suburban areas. Median Household Income: Middle to upp		500	1,200	National anchors/ National Branded Restaurants/ Dense residential/ College educated (50 percent with some college education). Daily needs (Supermarket/Drug Store)/ Entertainment Concepts.	High profile in-line, end-cap, or end-cap location. Ample parking contiguous with site, minimum 7- stalls. Easy ingress and egress (no more than two turns in or out). Pylon and/or monument signage. Standard vanilla shell with needed improvements.	Free Standing, Lifestyle Center, Neighborhood Strip, Power Center, Regional Strip, Special Strip
California Roll & Sushi							1,200	1,500		Will consider site range of 12,000-2,000 square feet. Excellent visibility from street. Ample parking supplied for use. Outside patio with seating desirable.	Free Standing, Neighborhood Strip, Regional Strip, Special Strip
HoneyBaked Ham Company and Café							1,500	2,500		Franchise units w/ Café require 1,500-2,000 sq ft. Corporate units w/ Café require 2,000- 2,500 sq ft.	Neighborhood Strip, Regional Strip
Exonaxa & Supplies Aaron Enrichers Art & Framing	5	50,000		30,000	Requires large concentration of households with income of \$50,000 or more.		5,500	7,000	Prefers to be in or near Big Box Power Centers.		Downtown, Free Standing, Power Center, Regional Strip
Health / Fitness / Nutrition Anytime Fitness						The Express Club is targeted for population centers of less than 5, 000 people.	1,200	5,000	Prefers to be near big box retailers and national grocery chains. Grocery Anchored is preferred.		Lifestyle Center, Neighborhood Strip, Power Center, Regional Strip, Special Strip
General Nutrition Center		30,000			Population of approximately 30,000- 35,000 people in designated trade area. Trade area overlaps with other existing GNC store's trade areas, required population will be analyzed accordingly.	Sites identified within an existing protected territory of another Franchisee's store, or other GNC licensees, will not be considered for site approval.	1,000	1,400	Prefers major retailers and major department stores, mass merchandiser, dominant grocery store, or national specialty shop retailers such as: Target, Wal-Mart, Kohl's, Barnes & Noble, any major department store, Hallmark, Starbucks, Radio Shack, Sally B	Minimum of at least 20 feet of frontage, column free. Visible to maximum amount of traffic. Proposed location, within the shopping center, must be visible to the maximum amount of traffic. Occupancy costs (annual rent, CAM, taxes, insurance) that are co	Downtown, Lifestyle Center, Neighborhood Strip, Outlet Mall, Power Center, Regional Mall, Regional Strip, Special Strip
Jenny Craig	3	100,000					1,500	2,000	Fashion, Grocery/Supermarket & Upscale.	Minimum 20 ft. frontage.	Neighborhood Strip, Regional Strip, Special Strip
LA Fitness	3	60,000	\$45,000	50,000	\$20,000 per capita income with strong educational attainment preferred.	50,000 ypd total all directions at intersection with visibility to site.	25,000	60,000	Grocery, Cinema and Fashion.	Prefers 35,000-60,000 sq. ft. buildings or 3.5-5.5 acres includes building and parking or 25,000 sq. ft. multi-level considered for dense urban areas. Targeting good retail sites with good traffic, access, visibility and parking.	Free Standing, Neighborhood Strip, Regional Strip, Special Strip
Physicians Immediate Care							4,500	5,500	Wal-Mart and other Big-Box retailers.		Downtown, Free Standing, Medical Center, Neighborhood Strip, Regional Strip, Special Strip
Weight Watchers	5	50,000	\$40,000			Urban initiative underway including some Spanish speaking meetings in metro markets.	1,400	1,600	Grocery or fresh food store.		Neighborhood Strip, Regional Strip, Special Strip
Western Donal			\$40,000	30,000	\$50,000 - \$45,000 median household income, median age 28-35.		3,500	4,500		High traffic retail locations are a must, highly visible end caps and freestanding buildings; anchored shopping centers, sites located against the street.	Free Standing, Neighborhood Strip, Regional Strip, Special Strip
Housewares Anna's Linens	5	150,000			Prefers approximately 30% African American or Hispanic population within the demographic area. Median Household Income of \$55,000-\$70,000.		7,000	10,000	National big-box tenants and major grocery stores.	Minimum 60 feet of frontage.	Free Standing, Neighborhood Strip, Power Center, Regional Mall, Regional Strip, Special Strip
Jewelry Kay Jewelers							1,400	2,000		1,400 sq. ft. - Enclosed regional malls over 500,000 square feet. 2,000 sq. ft. - Power Centers over 400,000 square feet.	Free Standing, Lifestyle Center, Neighborhood Strip, Outlet Mall, Power Center, Regional Mall, Regional Strip, Special Strip

Category / Retailer	Demo Mile Range	Demo Pop Min	Demo Avg. HI Income	Demo Traffic Count	Customer Base Comments	Other Customer Base Comments	Min SF	Max SF	Co Tenants	Comments	Facility Preference
Party Goods / Supplies	2	20,000					1,000	10,000			Neighborhood Strip, Power Center, Regional Strip, Special Strip
Discount Party Stores	5	150,000	\$50,000				12,000	16,000			Free Standing, Neighborhood Strip, Power Center, Regional Strip, Special Strip
Party City											
Restaurant											
Buffalo Wild Wings		40,000		25,000	Minimum 40,000 population, 60% or greater between the ages of 20 and 50 within the trade area. \$30,000 or greater median household income within the trade area. Minimum daytime/lunch population of 10,000.	Minimum daily traffic count in front of site - 25,000. Minimum daily traffic count on adjacent side street - 10,000. P.M. traffic side, far side of light.	4,000	7,000	Preferred Traffic Generators: Lifestyle or power centers with big box anchors: Old Navy, PetSmart, Kohl's, Home Depot, Lowe's, etc. National casual dining brands in a contiguous restaurant corridor. Super Wal-Mart, Super Target, Regional, super	120 plus parking spaces required. Excellent signage and visibility. Excellent site ingress and egress with traffic signal. Seven-day-per-week liquor sales.	Campus Site, Downtown, Free Standing, Gas Station, Hotel Lobby, Lifestyle Center, Medical Center, Neighborhood Strip, Office Building, Outlet Mall, Power Center, Regional Mall, Regional Strip, Special Strip, Transit Terminal
Daphne's Greek Cafe	2	50,000	\$100,000		35% plus college educated within 2 miles, ages 25-44 preferred.	Two major traffic generators.	1,600	2,200	Trader Joe's, Whole Foods, gourmet markets, Target and movie theaters.	Prefers 2,000 square feet, patio space and end cap with street visibility. A scale shall be required. Some market cross-hairing a must. Active center both night and day a must. Fast casual strategy a plus.	Downtown, Neighborhood Strip, Power Center, Regional Strip, Special Strip
Denny's		40,000		30,000	Permanent Population of 40,000 in trade area. Median household income: \$32,000 - \$50,000.		4,000	5,000	Regional shopping centers, hotels/motels, tourist attractions, office parks, street traffic, or combinations thereof, within close proximity.	Prefers land size of 30,000 sq. ft. and up with parking for 75 and seating totaling 140. Double ingress and egress and no dead end parking on premises. Corner or contiguous to corner or must be located on highway or major traffic corridor with at least	Downtown, Free Standing, Neighborhood Strip, Power Center, Regional Strip, Special Strip
HomeTown Buffet	5	150,000	\$50,000	25,000		Median HI income is \$40K - \$55K; densely populated retail trade areas: 60%-70% Family/retail population	9,500	11,500	One million+ retail SF within 1/2 mile, well recognized large box anchored retail centers.	Architecturally prominent end-cap or inline existing; 2-2.5 acres on site for development; Seating: 300-375; Parking: 130-175; Area Retail: 750,000 sq ft 6LA	Free Standing, Neighborhood Strip, Power Center, Regional Mall, Regional Strip, Special Strip
Johnny Rockets	3	25,000	\$55,000	40,000	5 minute drive time -> 6,000; 3 minute drive time -> 25,000; Median HI income: \$55,000+; Daytime Population of 80,000 in 3-mile radius.	Heavy foot traffic.	1,500	3,000	Malls, Lifestyle Centers, Amusement Parks, Casinos, Entertainment Venues, Power Centers, Outlet Malls, Public Transportation Hubs, Office Buildings, and Beach Areas. Key National Co-Brands.	End-cap or front position; Optimal SF is 1,500 sq. ft. Outside Seating A plus, ample parking, ample trademarks & signage.	Downtown, Free Standing, Lifestyle Center, Neighborhood Strip, Outlet Mall, Power Center, Regional Mall, Regional Strip, Special Strip, Transit Terminal
L & L Hawaiian Barbecue	3	50,000	\$65,000	0			1,000	2,500	Costco, Sam's Club, Target and Wal-Mart.		Downtown, Lifestyle Center, Neighborhood Strip, Regional Mall, Regional Strip, Special Strip, Transit Terminal
Mama Callender's Restaurant & Bakery	3	50,000	\$70,000	35,000			4,500	5,000			Free Standing, Neighborhood Strip, Regional Strip, Special Strip
Panda Express				45,000		Population 45,000+ and Day time population 10,000+ with in a 5 minute drive time. Strong balance of residential and daytime activity, average daily traffic: 45,000+ cars combined main and cross streets.	2,000	2,500	Shopping Centers anchored with Regional Set Goods Retailer, Grocery/Retailer, major entertainment a plus.	Prefers freestanding, end caps, conversions of 5,000 sq. ft.	Free Standing, Neighborhood Strip, Regional Strip, Special Strip, Transit Terminal
Round Table Pizza	1	15,000	\$45,000		Median household income of \$45,000 preferred.		400	4,000			Campus Site, Free Standing, Gas Station, Hotel Lobby, Lifestyle Center, Medical Center, Neighborhood Strip, Office Building, Outlet Mall, Power Center, Regional Mall, Regional Strip, Special Strip, Transit Terminal
Sansai Japanese Grill	2	40,000	\$70,000	30,000	Daytime population 20,000+, residential population 40,000+, average age 35-45 years.		1,500	2,500	Synergistic co-tenancy.	Prominent end cap: 1500 - 2500 square feet, patio or storefronts with unique identity and curb appeal. Convenient signalized access to main thoroughfares. Signage with exposure to main roads and adjacent retail.	Downtown, Lifestyle Center, Neighborhood Strip, Regional Strip, Special Strip

Category / Retailer	Demo Mile Range	Demo Pop Min	Demo Avg. HH Income	Demo Traffic Count	Customer Base Comments	Other Customer Base Comments	Min. SF	Max. SF	Co. Tenants	Comments	Facility Preference
T.G.I. Friday's	10	120,000	\$0	0			3,500	8,000		High visibility, high traffic, upper tier demographics, and convenient access. Prefers 7,000 sq. ft. freestanding pads or end-cap locations in major shopping centers. Will consider ground floor office buildings.	Free Standing, Neighborhood Strip, Office Building, Power Center, Regional Strip, Special Strip
BJ's Restaurant & Brewery	5	170,000	\$50,000		0 170% 200% people in a 5-7 mile radius is preferred.		8,000	9,000		135 parking spaces minimum.	Free Standing, Lifestyle Center, Power Center, Regional Mail, Regional Strip
Salon / Spa Happy Nails and Spa					High to Middle Incomes.		1,500	1,800			Lifestyle Center, Neighborhood Strip, Power Center, Regional Strip, Special Strip
Ziba Beauty					Caters to a distinctive, influential demographic base.		1,400	2,000	Upscale.		Lifestyle Center, Neighborhood Strip, Power Center, Regional Strip, Special Strip
Shoes Payless ShoeSource	5	30,000		15,000	Targets women between the ages of 18 and 49 years old.		2,800	3,500	Preferred anchors: (Macy's, department stores (JCPenney, Target, Kohls, Wal-Mart, Pretzels etc.), Women's or children's apparel stores (Forever 21, H&M, Lane Bryant, Justice, Children's Place).	Requires a minimum of 25 feet of footage, in-line locations are preferred over outparcels.	Lifestyle Center, Neighborhood Strip, Power Center, Regional Strip, Special Strip
The Athlete's Foot (TAF)	3	25,000					1,800	2,400		Typical store size is 2,000 sq. ft.	Downtown, Lifestyle Center, Neighborhood Strip, Power Center, Regional Mail, Regional Strip
Sporting Goods Big 5 Sporting Goods		35,000			Heavy Traffic Areas.		8,000	15,000	Prefers locations in multi-store shopping centers or free-standing street locations.	Prefers sites with 10,000-12,000 square feet (will consider 7,000-20,000). Site must also have high visibility. Pad locations are preferred or remodel existing building. Prefers locations in multi-store shopping centers or free-standing street locations.	Free Standing, Neighborhood Strip, Power Center, Regional Mail, Regional Strip

Source: LeaseTrac

Table 4: Contact Information

Retailer	Salutation	First Name	Last Name	Title	Contact Address 1	Contact Address 2
24 Hour Fitness	Mr.	Mike	Fleshima	Partner, Epsteen and Associates	5034 Carpinteria	
Aaron Brothers Art & Framing	Ms.	Lea	Hudak	Senior Vice President, Colliers International	One Park Plaza	Suite 900
AMC Theatres	Mr.	Tom	Krudson	Vice President of Real Estate	920 Main Street	
Anna's Linens	Mr.	Eric	Crisp	Sr. Associate Broker, Retail Net Lease Properties	360 North Sepulveda Boulevard	Suite 1020
Anytime Fitness	Ms.	Kate	Aslor	Broker Assistant, .FRE (Franchise Real Estate)	12181 Margo Avenue South	Suite 100
Baskin Robbins	Ms.	Janet	Berlin	Vice President of Real Estate	130 Royall Street	
Big 5 Sporting Goods	Mr.	Jim	Lynds	Real Estate Manager	2525 East El Segundo Boulevard	
BJ's Restaurant & Brewery	Mr.	Greg	Reenders	Executive VP & Chief Development Officer	7755 Center Avenue	Suite 300
Buffalo Wild Wings	Mr.	Jeff	Cangelosi	Broker, Strategic Retail Advisors	3990 Westerly Place	Suite 230
California Roll & Sushi	Mr.	Charlie	Cook	Senior Leasing Agent, Retail Net Lease Properties	360 North Sepulveda Boulevard	Suite 1020
Cold Stone Creamery	Mr.	Jeremy	Jesse	Director of Real Estate	9311 East Via de Ventura	
Corner Bakery Cafe	Mr.	Larry	Tanji	Director of Real Estate, Katz & Associates	5034 Carpinteria Avenue	Suite 202
Daphne's Greek Cafe	Mr.	David	Ryan	Broker, Epsteen & Associates	4505 West Hacienda Avenue	Suite 1
Discount Party Stores	Mr.	Larry	Ryan	Real Estate Representative	30 Dunnigan Drive	
Dress Barn Combination Stores	Mr.	Robert	Mataraso	Director of Real Estate	1590 North Batavia Street	Suite 2
General Nutrition Center	Mr.	Jared	Davis	Agent, Present Value Properties, Inc.	5803 East Northwest Highway	
Half Price Books	Ms.	Helen	Pacione	Manager of Real Estate	2125 East Katiella Avenue	Suite 100
Happy Nails and Spa	Mr.	Carlos	Diaz	Senior Associate, CB Richard Ellis	2525 East Camelback Road	Suite 625
Harkins Theatres	Mr.	Eric	Termonsan	Principal, Western Retail Advisors	6301 South 58th Street	
HobbyTown	Mr.	Rich	Aries	Real Estate Contact	16001 Ventura Boulevard	Suite 200
HomeTown Buffet	Mr.	Irwin	Hyman	Senior Vice President, NAI Capital	29 Music Street	
HoneyBaked Ham Company and Café	Mr.	Richard	Gore	Director of Real Estate	5770 Fleet Street	
Jenny Craig	Mr.	Mark	Schoffstall	Director of Real Estate	3775 Ghent Road	
Kay Jewelers	Ms.	Lacey	Wise	Leasing Manager	931 University Avenue	Suite 202
L & L Hawaiian Barbecue	Mr.	Harry	Alonso	Real Estate	8675 Washington Boulevard	Suite 201
LA Fitness	Mr.	Patrick	Gilhooley	Principal Broker, The Clover Company	1156 Hutchings Avenue	
Laser Quest	Mr.	Randy	Iaboni	CEO, Iaboni Real Estate	7555 Woodland Drive	Suite 800
Lids/Hat World	Mr.	Randy	Molander	Real Estate Director	2951 28th Street	Suite 2015
Marie Callender's Restaurant & Bakery	Mr.	Scott	Craig	Real Estate	One Park Plaza	Suite 900
Ment's Wearhouse	Mr.	Lyn	Rosenberg	Director of Real Estate	1683 Walnut Grove Avenue	
Michael's Arts & Crafts	Mr.	Max	Clay	Senior Vice President, Colliers International	614 North Bishop Avenue	Suite 1
Panda Express	Ms.	Lea	Pittman	Regional Real Estate Manager	8103 Burden Road	
Pearle Vision	Ms.	Ryan	Shoptaugh	Regional Director of Real Estate	2041 Rosecrans Avenue	
Physicians Immediate Care	Ms.	Julie	Johnson	Vice President of Business Development	1429 4th Street	
Ritz Camera	Mr.	Dean	McElroy	First Vice President, CBRE	1320 Willow Pass Road	Suite 600
Ross Dress For Less	Mr.	Jason	Gordon	Broker, Epsteen & Associates	1590 North Batavia Street	Suite 2
Round Table Pizza	Ms.	Robert	McCourt	President	16001 Ventura Boulevard	Suite 200
Sally Beauty	Mr.	Jared	Davis	Broker, Present Value Properties, Inc.	614 North Bishop Avenue	Suite 1
SanSai Japanese Grill	Mr.	Irwin	Hyman	Senior Vice President, NAI Capital	360 North Sepulveda Boulevard	Suite 1020
Sunglass Hut	Ms.	Martha	Doran	Regional Director of Real Estate	2558 Yale Place	
T.G.I. Friday's	Mr.	Charlie	Cangelosi	Sr Associate Broker, Retail Net Lease Properties	1346 Oakbrook Drive	Suite 170
T.J. Maxx	Ms.	Deborah	Holmsen	Real Estate Consultant	300 Jericho Quadrangle	Suite 350
The Athlete's Foot (TAF)	Mr.	Johnny	Bauman	Real Estate Manager	121 Southwest Morrison Street	Suite 200
Weight Watchers	Ms.	Janice	Logue	Real Estate Manager	17832 Pioneer Boulevard	
Western Dental	Mr.	J.J.	Unger	Broker, NAI-Norris, Beggs & Simpson		
Ziba Beauty	Mr.	Nik	Puni	Vice President of Expansion		

Source: LeaseTrac