

Council Update:

Retail Market Analysis & Recruitment Strategy

5/4/2021



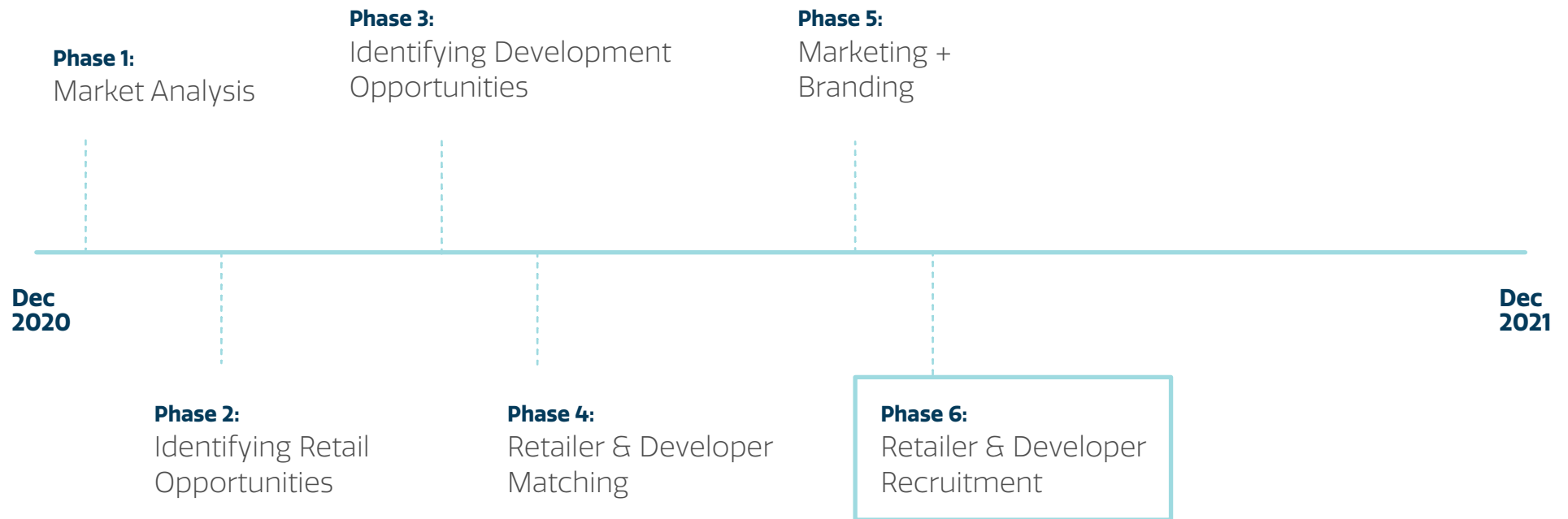
The city of Beaumont has hired The Retail Coach to provide a **Retail Market Analysis.**

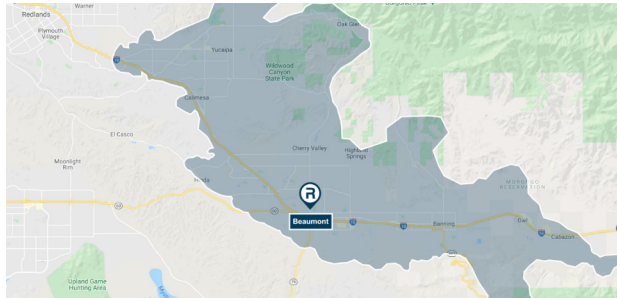
The analysis will be incorporated into the City's ongoing strategic planning efforts and used to highlight opportunities to grow or expand the City's retail base.

Key Objectives:

- **Study retail consumer activity in the City**
To better understand the Beaumont consumer base and current retail market.
- **Identify opportunities to grow/expand the City's retail base**
- **Be a resource to local business owners in Beaumont**
By providing data, consumer insights, and practical recommendations for reaching potential customers.

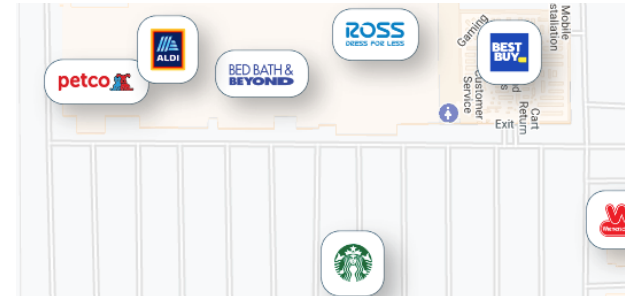
Council Update:
Scope of Work & Progress





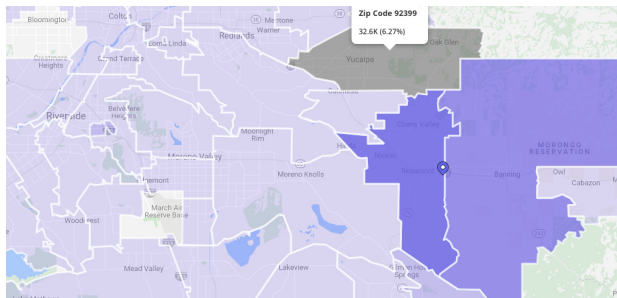
Retail Trade Area Analysis:

Where people are coming from to shop/dine in Beaumont.



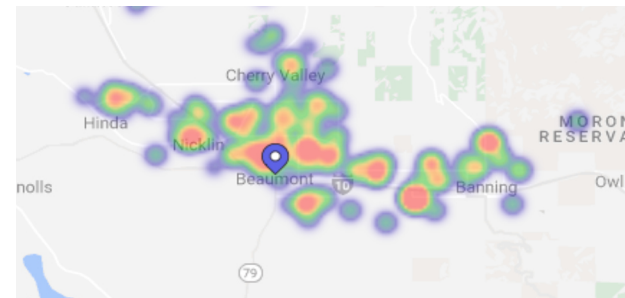
Retail Opportunities in Beaumont:

Projected demand growth across various retail sectors in Beaumont.



Zip Code Analysis:

Top zip codes people are coming from to shop/dine in Beaumont.



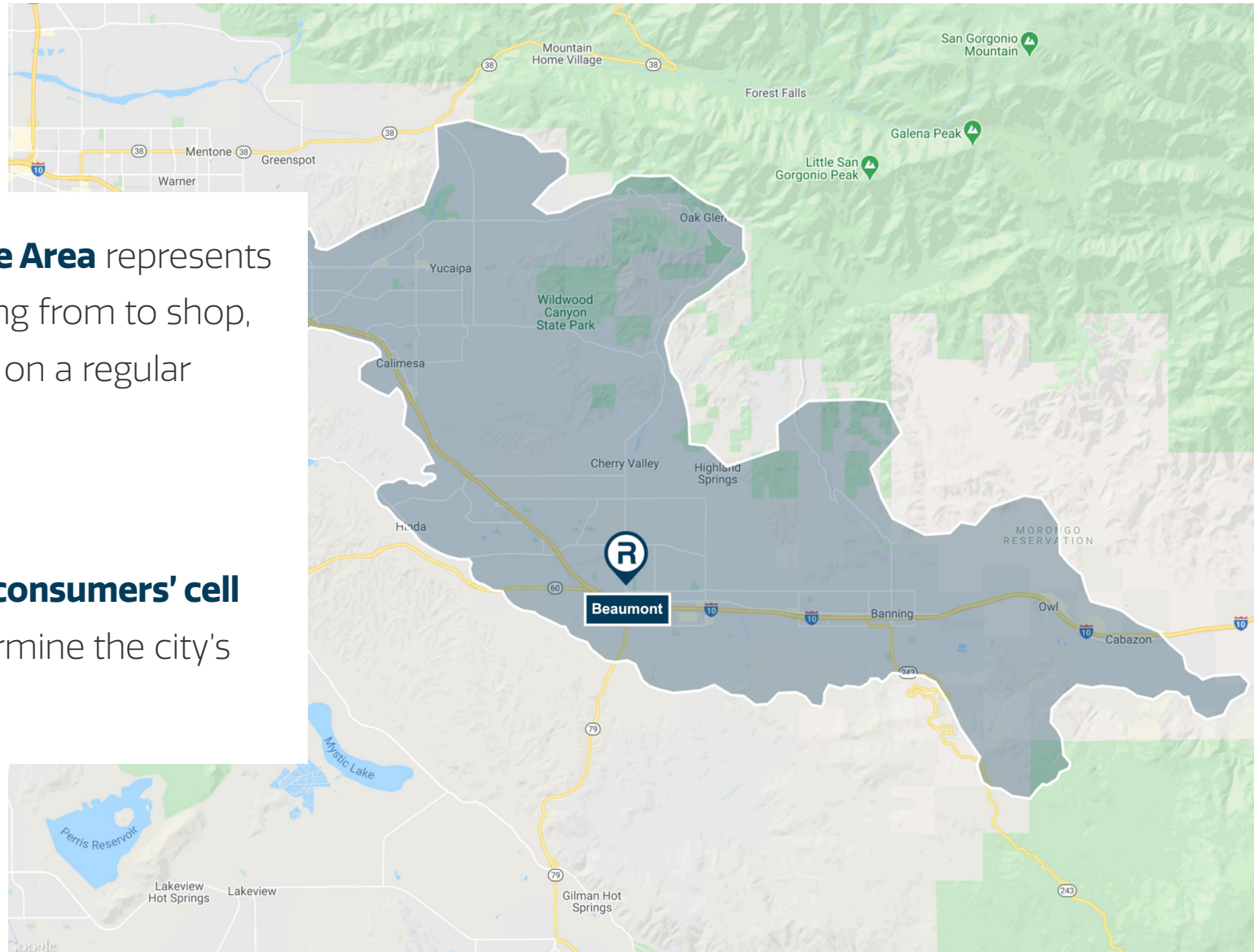
Retail Leakage Analysis:

Most frequented stores and restaurants people are going to outside of Beaumont.

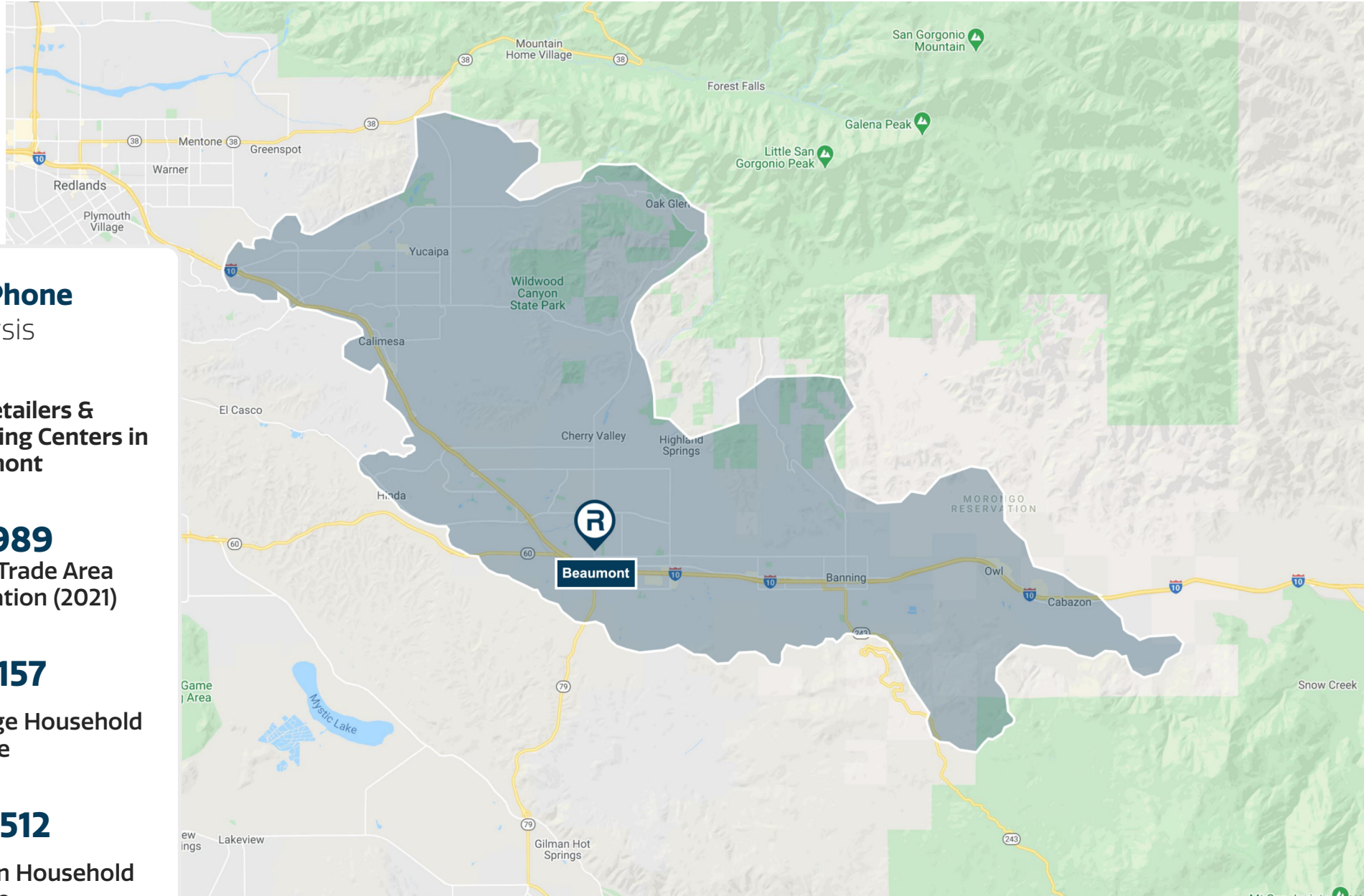
Retail Trade Area Analysis

Beaumont's **Retail Trade Area** represents where people are coming from to shop, dine, or receive services on a regular basis.

We use **GPS data from consumers' cell phones** to actually determine the city's retail trade area.



Primary Retail Trade Area



Cell Phone Analysis

Key Retailers & Shopping Centers in Beaumont

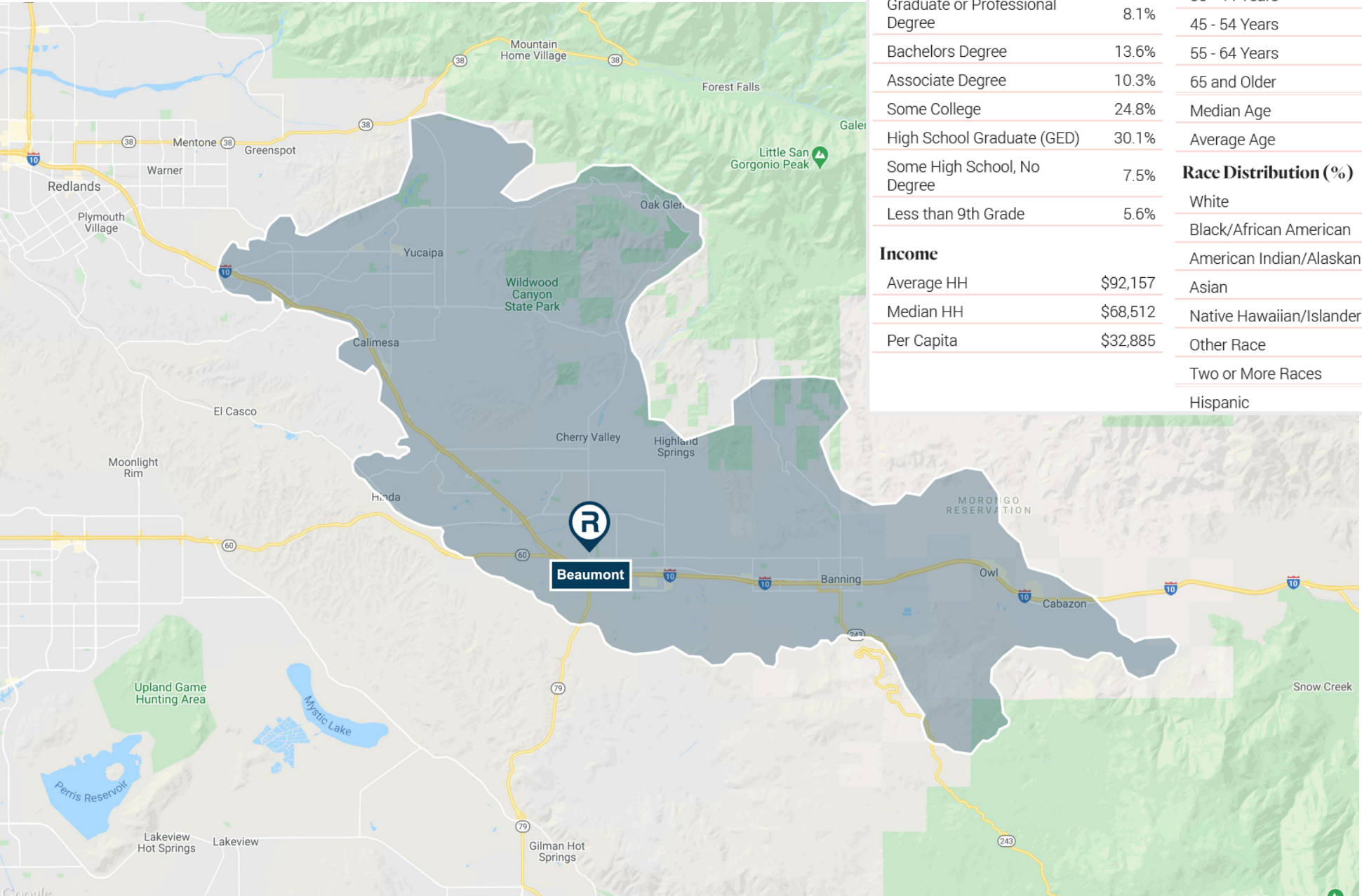
155,989
Retail Trade Area Population (2021)

\$92,157
Average Household Income

\$68,512
Median Household Income

The Beaumont Retail Market:

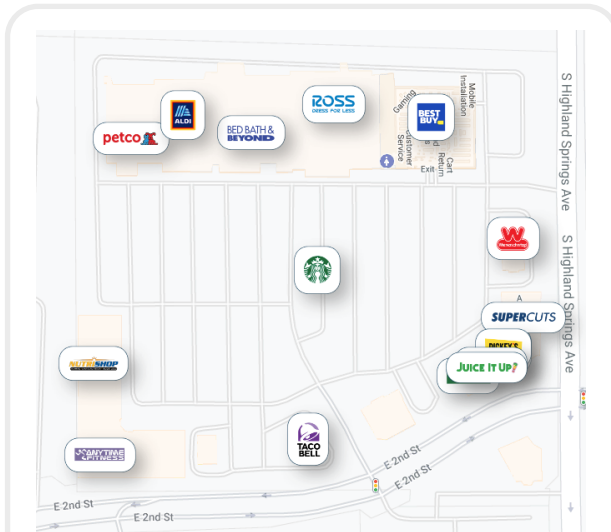
Primary Retail Trade Area



Population		Age	
2010	137,089	0 - 9 Years	12.67%
2021	155,989	10 - 17 Years	10.58%
2026	162,812	18 - 24 Years	8.61%
Educational Attainment (%)		25 - 34 Years	12.57%
Graduate or Professional Degree	8.1%	35 - 44 Years	12.17%
Bachelors Degree	13.6%	45 - 54 Years	10.86%
Associate Degree	10.3%	55 - 64 Years	11.64%
Some College	24.8%	65 and Older	20.89%
High School Graduate (GED)	30.1%	Median Age	39.49
Some High School, No Degree	7.5%	Average Age	40.81
Less than 9th Grade	5.6%	Race Distribution (%)	
Income		White	66.29%
Average HH	\$92,157	Black/African American	4.98%
Median HH	\$68,512	American Indian/Alaskan	1.73%
Per Capita	\$32,885	Asian	5.68%
		Native Hawaiian/Islander	0.22%
		Other Race	15.47%
		Two or More Races	5.62%
		Hispanic	40.95%

The Beaumont Consumer:

Top Zip Codes - Shopping Centers

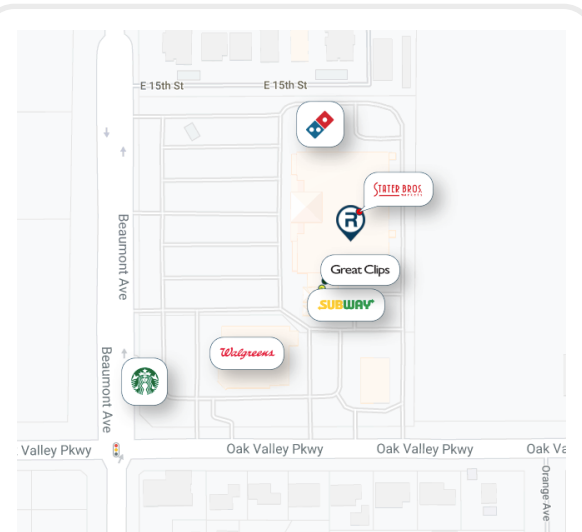


Top Zip Codes

Beaumont Marketplace

1604 2ND ST, BEAUMONT, 92223, CA

Zip Code	City State	% Of Customers
92223	Beaumont	12.97
92220	Banning	7.85
92399	Yucaipa	6.27
92583	San Jacinto	2.7
92544	Hemet	2.41
92582	San Jacinto	1.86
92240	Desert Hot Springs	1.59
92545	Hemet	1.5
92320	Calimesa	1.44
92553	Moreno Valley	1.34
92543	Hemet	1.29
92555	Moreno Valley	1.25
92346	Highland	1.18
92374	Redlands	1.12
92284	Yucca Valley	1.12
92373	Redlands	1.11



Top Zip Codes

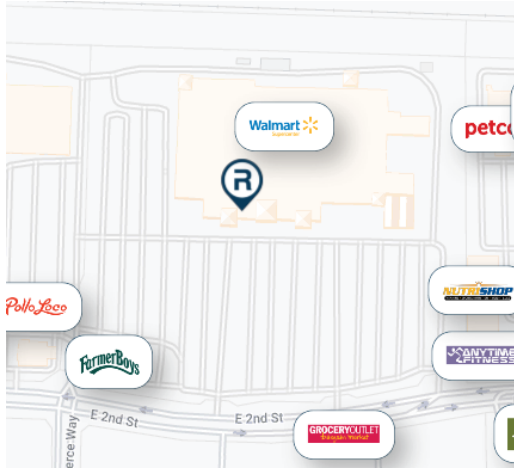
Oak Valley Towne Center

1430 BEAUMONT AVE BEAUMONT, 92223, CA

Zip Code	City State	% Of Customers
92223	Beaumont	24.93
92220	Banning	10.52
92399	Yucaipa	5.69
92320	Calimesa	1.48
92373	Redlands	1.33
92374	Redlands	1.21
92545	Hemet	1.04
92230	Cabazon	1.02
92544	Hemet	0.9
92557	Moreno Valley	0.89
92503	Riverside	0.87
92346	Highland	0.82
92583	San Jacinto	0.81
92543	Hemet	0.73
92553	Moreno Valley	0.73
92324	Colton	0.72

The Beaumont Consumer:

Top Zip Codes - Retailers

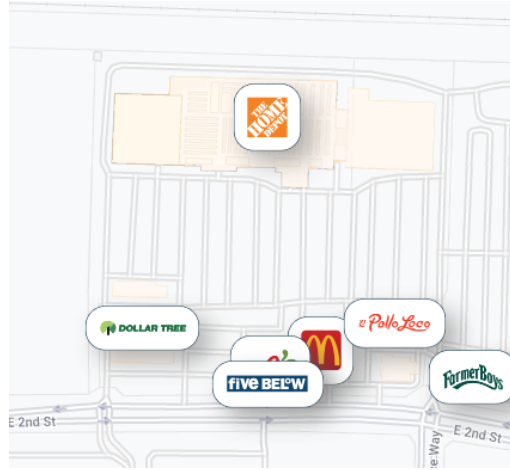


Top Zip Codes

Walmart

1540 E 2ND ST BEAUMONT, 92223, CA

Zip Code	City	% of customer
92223	Beaumont	13.1
92399	Yucaipa	9.56
92220	Banning	8.94
92240	Desert Hot Springs	2.51
92583	San Jacinto	2.17
92544	Hemet	2.11
92320	Calimesa	1.85
92374	Redlands	1.62
92582	San Jacinto	1.55
92373	Redlands	1.51
92545	Hemet	1.31
92543	Hemet	1.22
92346	Highland	1.16
92553	Moreno Valley	0.93
92230	Cabazon	0.85
92404	San Bernardino	0.8

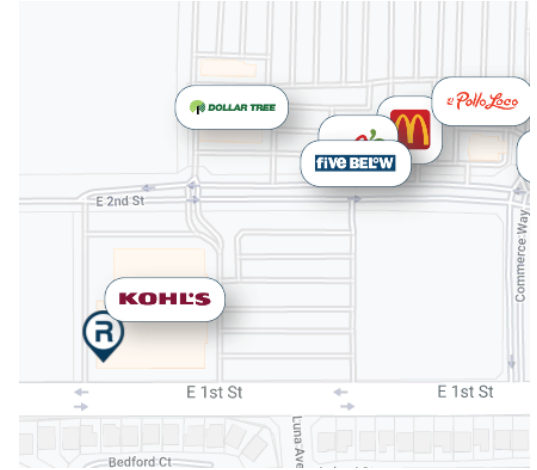


Top Zip Codes

Home Depot

1430 BEAUMONT AVE BEAUMONT, 92223, CA

Zip Code	City	% of customer
92223	Beaumont	20.53
92220	Banning	14.93
92399	Yucaipa	10.62
92320	Calimesa	2.98
92583	San Jacinto	2.88
92544	Hemet	2.26
92582	San Jacinto	1.49
92374	Redlands	1.29
92240	Desert Hot Springs	1.06
92373	Redlands	1.04
92230	Cabazon	0.99
92543	Hemet	0.78
92234	Cathedral City	0.74
92545	Hemet	0.73
92557	Moreno Valley	0.7
92555	Moreno Valley	0.69



Top Zip Codes

Kohl's

1430 BEAUMONT AVE BEAUMONT, 92223, CA

Zip Code	City	% of customer
92223	Beaumont	24.16
92220	Banning	15.78
92399	Yucaipa	7.55
92583	San Jacinto	6.04
92544	Hemet	4.44
92582	San Jacinto	3.3
92545	Hemet	2.9
92543	Hemet	2.4
92320	Calimesa	2.16
92555	Moreno Valley	1.77
92230	Cabazon	1.59
92284	Yucca Valley	0.95
92240	Desert Hot Springs	0.88
92374	Redlands	0.76
92346	Highland	0.57
92373	Redlands	0.56

The Beaumont Consumer:

Top Zip Codes - Restaurants



Top Zip Codes

Panera Bread

1620 E 1ST ST BEAUMONT, 92223, CA

Zip Code	City	% of customer
92223	Beaumont	25.56
92220	Banning	17.43
92399	Yucaipa	7.32
92320	Calimesa	2.36
92583	San Jacinto	1.83
92234	Cathedral City	1.43
92374	Redlands	1.28
92545	Hemet	1.09
92373	Redlands	1.07
92230	Cabazon	1.05
92544	Hemet	0.93
92346	Highland	0.92
92582	San Jacinto	0.84
92253	La Quinta	0.83
92252	Joshua Tree	0.8
92240	Desert Hot Springs	0.77



Top Zip Codes

Raising Cane's

E 2ND ST BEAUMONT, 92223, CA

Zip Code	City	% of customer
92223	Beaumont	17.66
92220	Banning	10.16
92234	Cathedral City	6.59
92201	Indio	4.71
92583	San Jacinto	4.15
92236	Coachella	3.4
92399	Yucaipa	3.2
92240	Desert Hot Springs	1.91
92253	La Quinta	1.73
92203	Indio	1.7
92582	San Jacinto	1.53
92274	Thermal	1.45
92543	Hemet	1.21
92260	Palm Desert	1.19
92211	Palm Desert	1.17
92544	Hemet	1.12



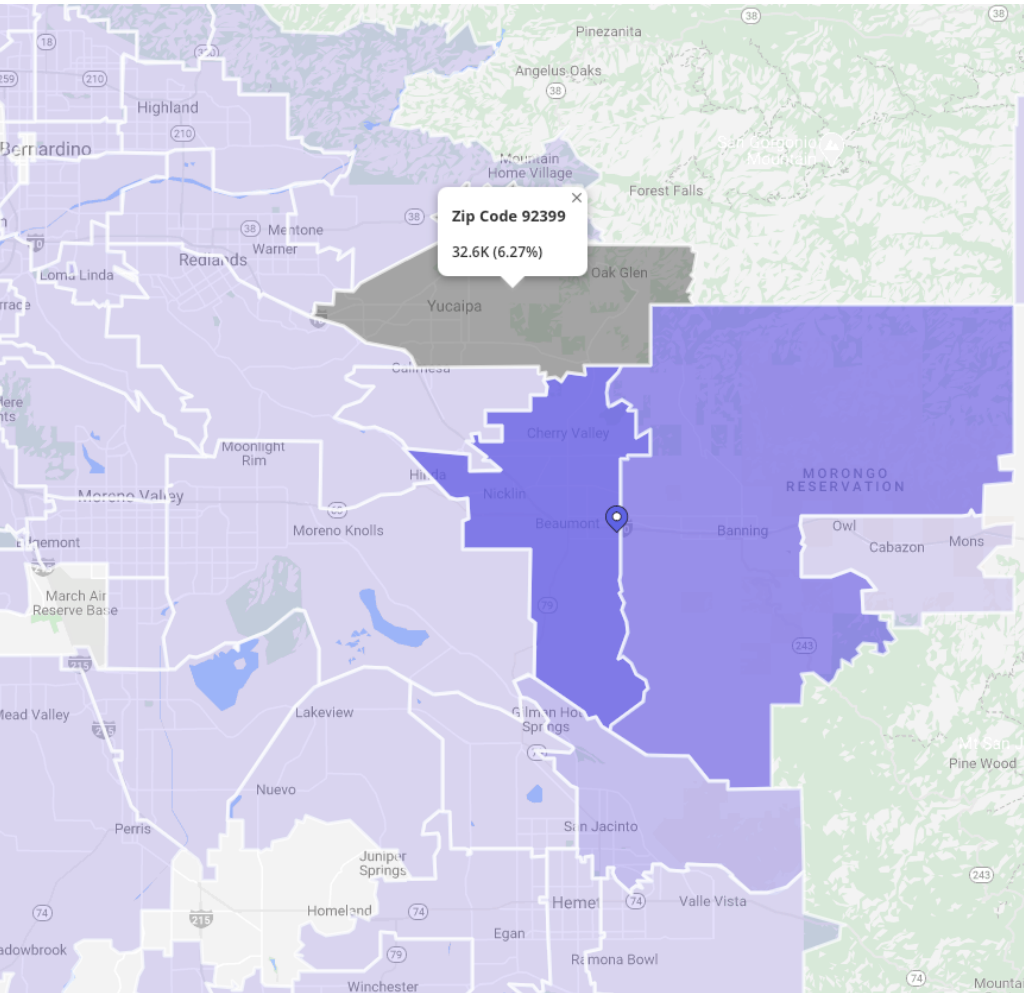
Top Zip Codes

Chili's

1490 E 2ND ST BEAUMONT, 92223, CA

Zip Code	City	% of customer
92223	Beaumont	23.43
92220	Banning	15.56
92399	Yucaipa	7.01
92583	San Jacinto	2.43
92240	Desert Hot Springs	1.92
92320	Calimesa	1.86
92544	Hemet	1.71
92284	Yucca Valley	1.66
92234	Cathedral City	1.48
92230	Cabazon	1.21
92582	San Jacinto	1.14
92201	Indio	1.03
92545	Hemet	1
92374	Redlands	0.94
92262	Palm Springs	0.84
92277	Twentynine Palms	0.82

The Beaumont Consumer: Top Zip Codes



Key Takeaway:

People are coming from surrounding areas to shop, dine, and get services in Beaumont.

- **Top draw areas** for Beaumont businesses:
 - Banning
 - Yucaipa
 - Calimesa
 - San Jacinto
 - Hemet
- **Opportunity:** Market to surrounding communities to grow your consumer base outside of Beaumont and just neighboring communities.

Leakage to Other Markets

Shopping Centers

Shopping Center	Category	City	% Beaumont Consumers
Tri-City Corporate Center	Mall	San Bernardino	41.27
Sun Lakes Village	Shopping Center	Banning	36.78
Citrus Plaza	Mall	Redlands	35.25
Mountain Grove at Citrus Plaza	Shopping Center	Redlands	32.13
Desert Hills Premium Outlets	Shopping Center	Cabazon	31.62
Ontario Mills	Mall	Ontario	22.15
Victoria Gardens	Shopping Center	Rancho Cucamonga	21.16
Pavilion at Redlands	Shopping Center	Redlands	20.8
Towngate Promenade	Shopping Center	Moreno Valley	20.08
Galleria at Tyler	Mall	Riverside	19.8
Moreno Valley Mall	Mall	Moreno Valley	19.33
Yucaipa Valley Center	Shopping Center	Yucaipa	17.94
Stoneridge Towne Center	Shopping Center	Moreno Valley	17.27
Redlands Town Center	Shopping Center	Redlands	16.93
Inland Center	Mall	San Bernardino	16.86
Stagecoach Plaza	Shopping Center	Banning	16.2
Orange St. Plaza	Shopping Center	Redlands	15.89
Moreno Beach Plaza	Shopping Center	Moreno Valley	15.76
Canyon Crossings	Shopping Center	Riverside	15.36
Desert Gateway	Shopping Center	Palm Desert	15.22
Orange Tree Marketplace	Shopping Center	Redlands	14.88
Page Plaza	Shopping Center	Hemet	14.5
Packinghouse District	Shopping Center	Redlands	14.09
Tri-City Redlands Shopping Center	Shopping Center	Redlands	14.08

Leakage to Other Markets

Restaurants

Shopping Center	Category	City	% Beaumont Consumers
Corky's Kitchen and Bakery - Yucaipa	American	Yucaipa	14.93
Red Robin Gourmet Burgers	Burger Joint	Redlands	10.7
Chick-fil-A	Fast Food	Redlands	10.6
In-N-Out Burger	Burger Joint	Hemet	8.01
Olive Garden	Italian	San Bernardino	7.96
BJ's Restaurant and Brewhouse	American	San Bernardino	7.48
In-N-Out Burger	Burger Joint	Thousand Palms	7.36
Baker's Drive Thru	Fast Food	Calimesa	5.65

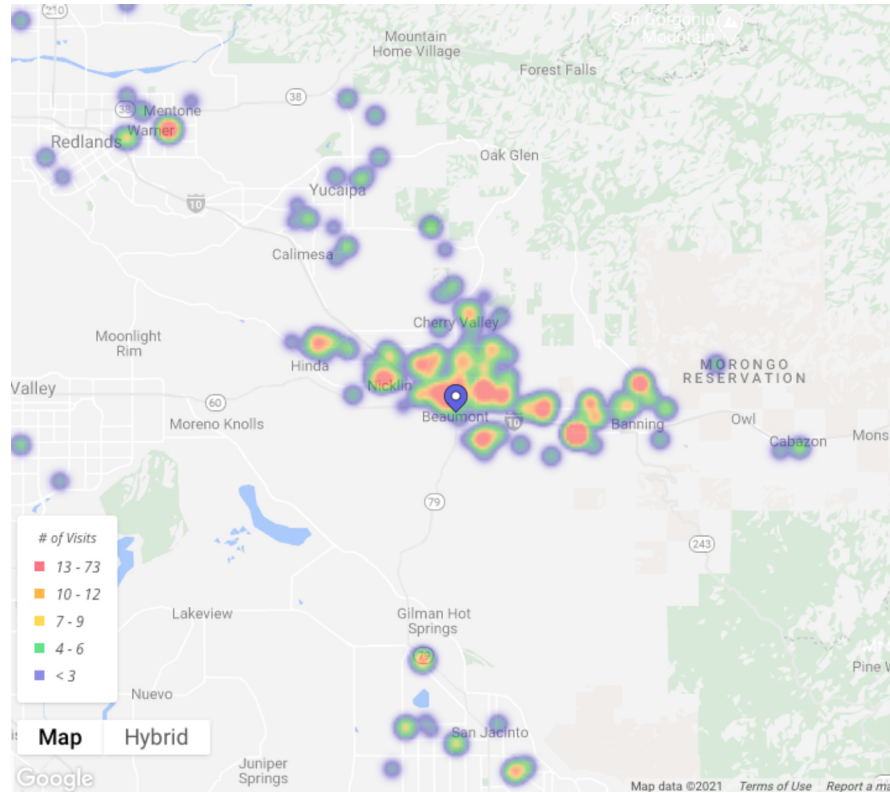
The Beaumont Consumer:

Beaumont Consumer Behavior

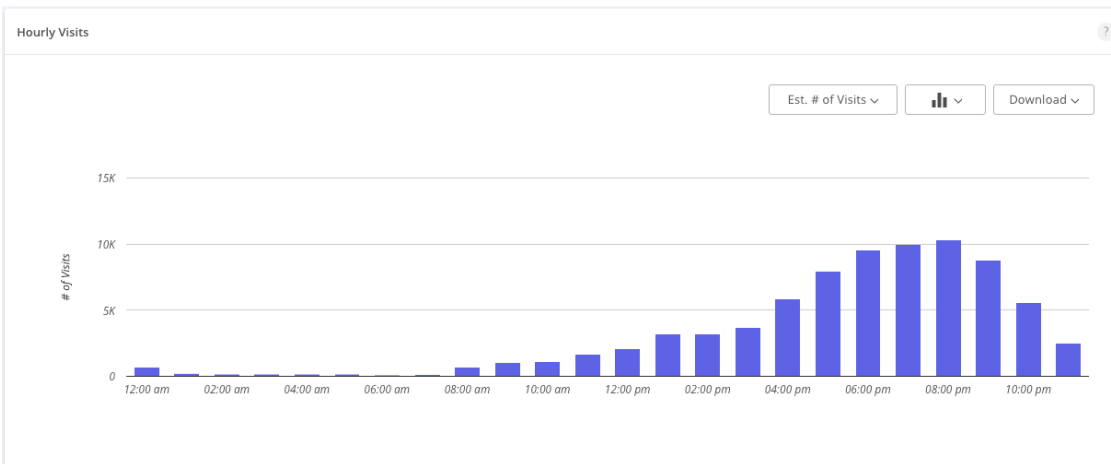
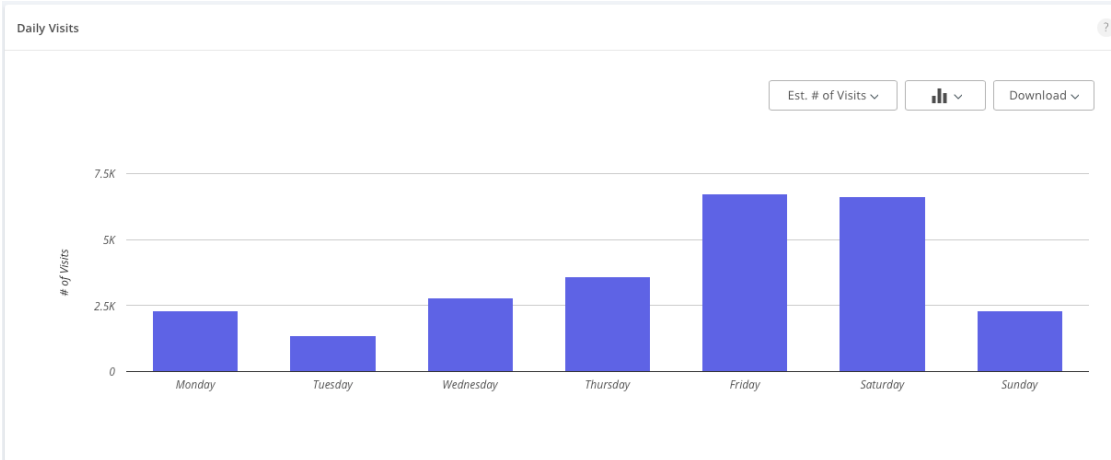
Retailer/Business

The Craft Lounge – Tap Room & Bottleshop

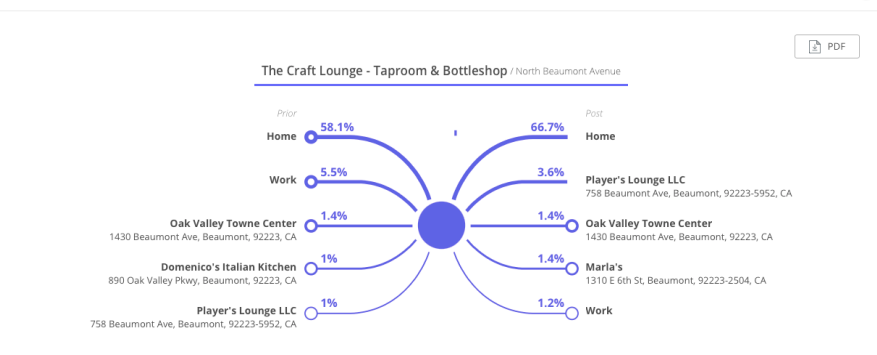
690 NORTH BEAUMONT AVENUE, BEAUMONT, 92223, CA



The Craft Lounge - Taproom & Bottleshop		
Zip Code	City, State	% of Customers
1 92223	Beaumont, CA	40.75%
2 92220	Banning, CA	15.41%
3 92399	Yucaipa, CA	3.16%
4 92374	Redlands, CA	3.14%
5 92324	Colton, CA	2.86%
6 92506	Riverside, CA	2.66%
7 92553	Moreno Valley, CA	2.13%



Customer Journey



Retail Demand Growth:

Retail Opportunities

NAICS	DESCRIPTION	2021 DEMAND	2026 DEMAND	GROWTH	CAGR (%)*
44, 45, 722	Total retail trade including food and drinking places	\$1,407,788,100	\$1,638,463,021	\$230,674,921	3.08%
441	Motor vehicle and parts dealers	\$250,560,011	\$303,110,357	\$52,550,346	3.88%
4411	Automobile dealers	\$217,405,052	\$264,320,298	\$46,915,246	3.99%
4412	Other motor vehicle dealers	\$8,865,068	\$10,977,470	\$2,112,402	4.37%
4413	Automotive parts, accessories, and tire stores	\$24,289,891	\$27,812,589	\$3,522,698	2.75%
442	Furniture and home furnishings stores	\$14,894,147	\$15,994,821	\$1,100,674	1.44%
4421	Furniture stores	\$9,161,346	\$9,792,701	\$631,355	1.34%
4422	Home furnishings stores	\$5,732,801	\$6,202,120	\$469,319	1.59%
443	Electronics and appliance stores	\$26,559,862	\$31,521,945	\$4,962,082	3.49%
443141	Household appliance stores	\$6,215,719	\$7,174,340	\$958,621	2.91%
443142	Electronics stores	\$20,344,143	\$24,347,605	\$4,003,462	3.66%
444	Building material and garden equipment and supplies dealers	\$78,865,285	\$87,668,884	\$8,803,599	2.14%
4441	Building material and supplies dealers	\$69,039,601	\$76,685,301	\$7,645,700	2.12%
44411	Home centers	\$39,394,142	\$43,828,468	\$4,434,326	2.16%
44412	Paint and wallpaper stores	\$2,524,340	\$2,806,602	\$282,262	2.14%
44413	Hardware stores	\$6,695,797	\$7,419,229	\$723,432	2.07%
44419	Other building material dealers	\$20,425,322	\$22,631,002	\$2,205,679	2.07%
4442	Lawn and garden equipment and supplies stores	\$9,825,684	\$10,983,583	\$1,157,899	2.25%
44421	Outdoor power equipment stores	\$1,846,973	\$2,046,738	\$199,765	2.08%
44422	Nursery, garden center, and farm supply stores	\$7,978,711	\$8,936,845	\$958,134	2.29%
445	Food and beverage stores	\$224,505,645	\$244,485,424	\$19,979,780	1.72%
4451	Grocery stores	\$207,555,355	\$225,734,686	\$18,179,332	1.69%
44511	Supermarkets and other grocery (except convenience) stores	\$199,385,958	\$216,835,187	\$17,449,229	1.69%
44512	Convenience stores	\$8,169,397	\$8,899,499	\$730,102	1.73%
4452	Specialty food stores	\$6,299,818	\$6,768,433	\$468,615	1.45%
4453	Beer, wine, and liquor stores	\$10,650,473	\$11,982,306	\$1,331,833	2.38%
446	Health and personal care stores	\$34,917,224	\$41,649,501	\$6,732,277	3.59%
44611	Pharmacies and drug stores	\$26,465,891	\$31,490,396	\$5,024,506	3.54%
44612	Cosmetics, beauty supplies, and perfume stores	\$1,552,720	\$1,919,489	\$366,769	4.33%
44613	Optical goods stores	\$5,446,198	\$6,490,057	\$1,043,859	3.57%
44619	Other health and personal care stores	\$1,452,415	\$1,749,559	\$297,144	3.79%
447	Gasoline stations	\$117,062,626	\$150,145,489	\$33,082,864	5.10%

Retail Demand Growth:

Retail Opportunities

NAICS	DESCRIPTION	2021 DEMAND	2026 DEMAND	GROWTH	CAGR (%)*
448	Clothing and clothing accessories stores	\$46,309,206	\$50,539,755	\$4,230,549	1.76%
4481	Clothing stores	\$33,616,804	\$36,204,282	\$2,587,478	1.49%
44811	Men's clothing stores	\$1,424,826	\$1,533,244	\$108,418	1.48%
44812	Women's clothing stores	\$6,107,320	\$6,549,086	\$441,766	1.41%
44813	Children's and infants' clothing stores	\$1,693,585	\$1,817,858	\$124,273	1.43%
44814	Family clothing stores	\$20,739,436	\$22,388,176	\$1,648,740	1.54%
44815	Clothing accessories stores	\$1,117,309	\$1,206,876	\$89,567	1.55%
44819	Other clothing stores	\$2,534,328	\$2,709,042	\$174,714	1.34%
4482	Shoe stores	\$9,752,404	\$10,990,511	\$1,238,107	2.42%
4483	Jewelry, luggage, and leather goods stores	\$2,939,998	\$3,344,962	\$404,964	2.61%
44831	Jewelry stores	\$2,165,525	\$2,498,068	\$332,543	2.90%
44832	Luggage and leather goods stores	\$774,473	\$846,894	\$72,421	1.80%
451	Sporting goods, hobby, musical instrument, and book stores	\$18,412,626	\$21,972,196	\$3,559,570	3.60%
4511	Sporting goods, hobby, and musical instrument stores	\$14,368,561	\$17,664,190	\$3,295,629	4.22%
45111	Sporting goods stores	\$9,037,374	\$11,409,891	\$2,372,517	4.77%
45112	Hobby, toy, and game stores	\$2,608,068	\$2,915,048	\$306,980	2.25%
45113	Sewing, needlework, and piece goods stores	\$546,575	\$601,841	\$55,266	1.95%
45114	Musical instrument and supplies stores	\$2,176,544	\$2,737,411	\$560,867	4.69%
4512	Book stores and news dealers	\$4,044,065	\$4,308,006	\$263,940	1.27%
452	General merchandise stores	\$190,790,115	\$213,007,625	\$22,217,510	2.23%
4522	Department stores	\$12,145,447	\$13,509,342	\$1,363,895	2.15%
4523	Other general merchandise stores	\$178,644,668	\$199,498,284	\$20,853,615	2.23%
453	Miscellaneous store retailers	\$27,582,168	\$31,100,921	\$3,518,754	2.43%
4531	Florists	\$1,019,081	\$1,126,131	\$107,050	2.02%
4532	Office supplies, stationery, and gift stores	\$5,560,271	\$6,072,401	\$512,130	1.78%
45321	Office supplies and stationery stores	\$2,046,752	\$2,237,213	\$190,460	1.80%
45322	Gift, novelty, and souvenir stores	\$3,513,518	\$3,835,188	\$321,670	1.77%
4533	Used merchandise stores	\$5,005,984	\$5,644,215	\$638,231	2.43%
4539	Other miscellaneous store retailers	\$15,996,832	\$18,258,174	\$2,261,343	2.68%
45391	Pet and pet supplies stores	\$6,423,762	\$7,820,024	\$1,396,262	4.01%
45399	All other miscellaneous store retailers	\$9,573,070	\$10,438,150	\$865,081	1.75%
454	Non-store retailers	\$182,851,749	\$207,621,701	\$24,769,952	2.57%
722	Food services and drinking places	\$194,477,436	\$239,644,402	\$45,166,965	4.27%
7223	Special food services	\$13,562,773	\$16,730,950	\$3,168,177	4.29%
7224	Drinking places (alcoholic beverages)	\$5,220,958	\$6,170,527	\$949,570	3.40%
7225	Restaurants and other eating places	\$175,693,705	\$216,742,924	\$41,049,218	4.29%
722511	Full-service restaurants	\$83,686,896	\$102,897,693	\$19,210,796	4.22%
722513	Limited-service restaurants	\$78,023,686	\$96,594,830	\$18,571,144	4.36%
722514	Cafeterias, grill buffets, and buffets	\$1,986,413	\$2,459,726	\$473,313	4.37%
722515	Snack and nonalcoholic beverage bars	\$11,996,710	\$14,790,675	\$2,793,964	4.28%