



## Live Oak Retail Market Analysis

For the City of  
Live Oak, California



CITY OF  
LIVE OAK  
California

Report  
April 2009

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# Introduction

The purpose of this analysis is to:

- Provide a comprehensive assessment of potential market support for retail uses in the Live Oak's commercial districts.
- Create an accurate picture of Live Oak's retail industry including the characterization of the existing supply of businesses; consumer preferences, needs and buying patterns; and opportunities and challenges for growth and development.
- Provide the City with a factual base for developing strategies to strengthen and diversify the retail base and capture more consumer dollars in Live Oak.
- Recommend business development and marketing strategies to strengthen Live Oak's retail base.

As part of this assignment, Marketek conducted a community-wide resident survey of shopping preferences, in-store visits, a community tour and numerous personal and telephone interviews with Live Oak businesses.

The statistical retail market analysis includes an estimate of potential retail sales and supportable space within a ten year time period from 2009 to 2019, which is a realistic projection period for retail development.

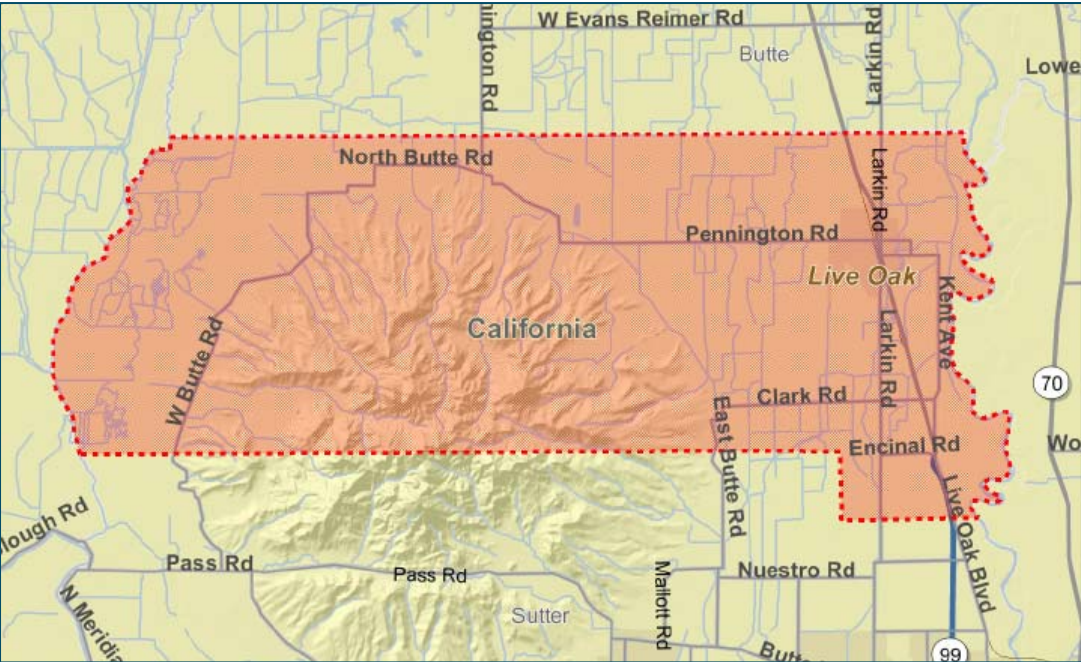
This report is organized into three principal sections:

1. Retail Market Analysis
2. Community Input & Competitive Assessment
3. Business Development Plan

# Retail Market Analysis

Based upon the patronage of existing businesses, Live Oak's location within the region, its competitive assets and proposed redevelopment activity, Marketek delineated a Live Oak Trade Area, roughly equivalent to the Live Oak Unified School District boundaries, illustrated on the map below. For comparative purposes, demographic data are presented for the City of Live Oak, Sutter County and the State of California.

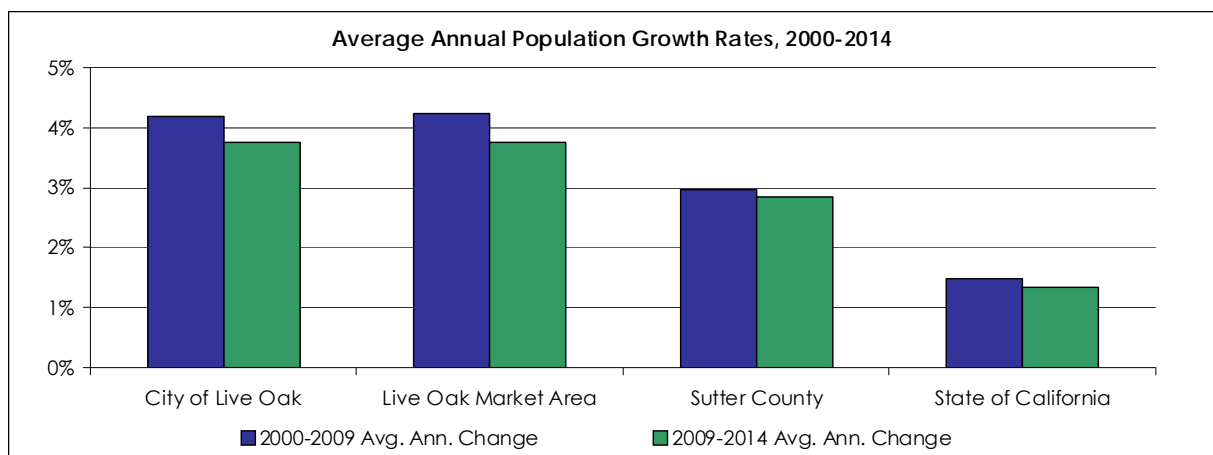
Live Oak Market Area



## EXHIBIT 1.01 Population

Population within the Live Oak Market Area is estimated at 11,484 persons and 3,343 households in 2009. Since 2000, the average annual growth rates in the Market Area surpassed those of the City, County and State. This trend is expected to continue through 2014, although growth rates are projected to slow somewhat. Forecasts indicate that the Market Area will reach 13,644 persons and 3,963 households in the next five years.

POPULATION & HOUSEHOLD GROWTH City of Live Oak, Live Oak Market Area, Sutter County and State of California 2000-2014							
Geographic Area	Avg. Ann. Change 2000-2009				Avg. Ann. Change 2009-2014		
	2000	2009 (Estimate)	Number	Percent	2014 (Forecast)	Number	Percent
<b>City of Live Oak</b>							
Population	6,229	8,580	261	4.19%	10,191	322	3.76%
Households	1,729	2,336	67	3.90%	2,772	87	3.73%
Avg. Household Size	3.43	3.54	0.012		3.56	0.004	
<b>Live Oak Market Area</b>							
Population	8,313	11,484	352	4.24%	13,644	432	3.76%
Households	2,461	3,343	98	3.98%	3,963	124	3.71%
Avg. Household Size	3.25	3.34	0.010		3.37	0.006	
<b>Sutter County</b>							
Population	78,930	99,954	2,336	2.96%	114,149	2,839	2.84%
Households	27,033	33,411	709	2.62%	37,934	905	2.71%
Avg. Household Size	2.87	2.95	0.009		2.98	0.006	
<b>State of California</b>							
Population	33,871,648	38,391,568	502,213	1.48%	40,982,373	518,161	1.35%
Households	11,502,870	12,798,510	143,960	1.25%	13,597,743	159,847	1.25%
Avg. Household Size	2.87	2.93	0.007		2.95	0.004	



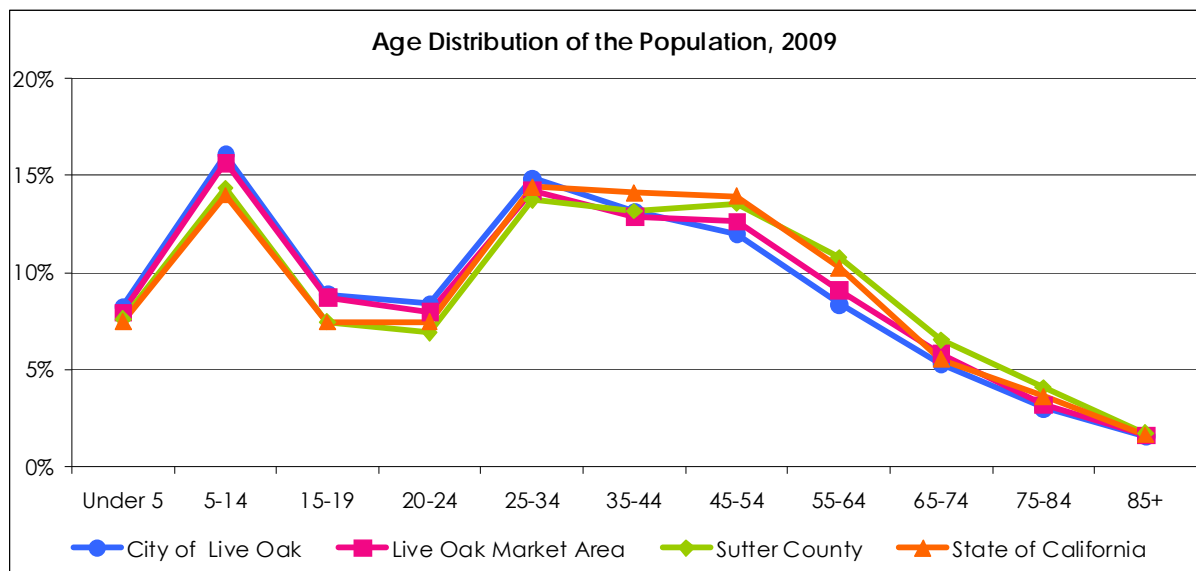
Source: ESRI BIS

## EXHIBIT 1.02

### Age

The median age of Market Area residents, 31.4 years, is a bit higher than that of the City (30.1 year) and below that of the County and State (34.9 years and 34.4 years, respectively).

POPULATION BY AGE City of Live Oak, Live Oak Market Area, Sutter County and State of California 2009				
Age Category	City of Live Oak	Live Oak Market Area	Sutter County	State of California
Under 5	8.3%	8.0%	7.6%	7.5%
5-14	16.1%	15.7%	14.3%	14.0%
15-19	8.9%	8.7%	7.5%	7.5%
20-24	8.4%	8.0%	6.9%	7.5%
25-34	14.8%	14.2%	13.7%	14.4%
35-44	13.2%	12.9%	13.2%	14.1%
45-54	12.0%	12.7%	13.6%	13.9%
55-64	8.4%	9.1%	10.8%	10.3%
65-74	5.3%	5.8%	6.5%	5.6%
75-84	3.0%	3.2%	4.1%	3.6%
85+	1.6%	1.7%	1.8%	1.7%
Total	8,580	11,484	99,954	38,391,568
Median Age	30.1	31.4	34.9	34.4

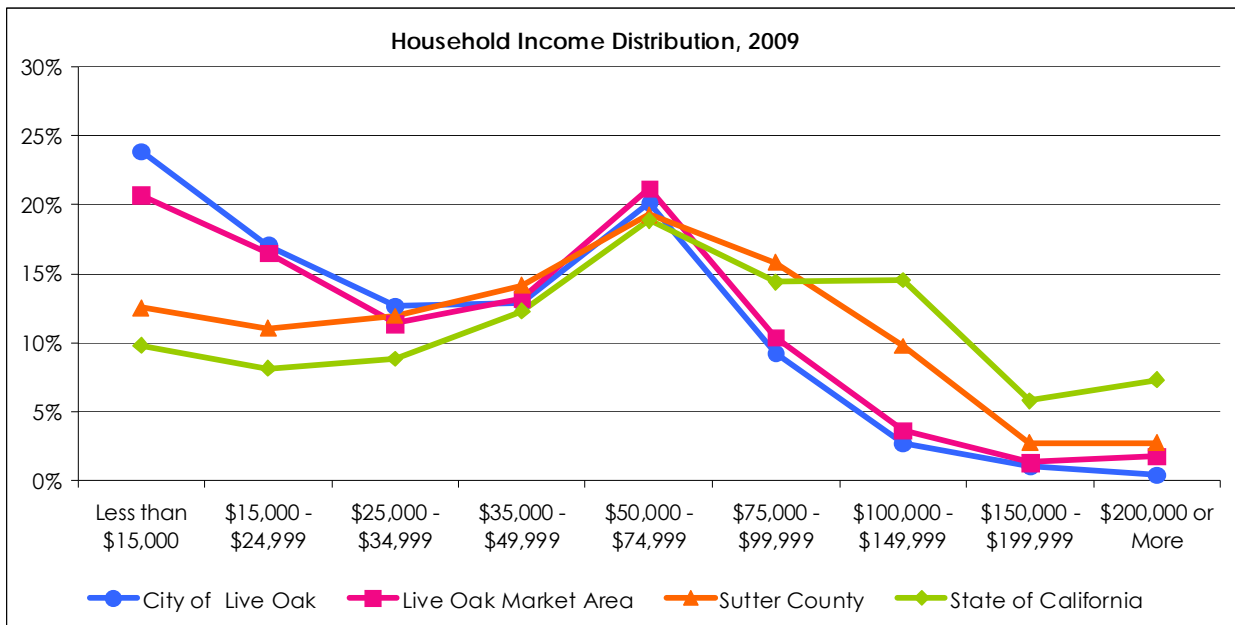


Source: ESRI BIS

## EXHIBIT 1.03 Household Income

The distribution of household income for the Live Oak Market Area resembles that of the City of Live Oak. Households in both of these geographies tend to have lower incomes than households in Sutter County and California. The Market Area median household income is estimated at \$36,639, above the City's median of \$31,663, but below those of the County and State (\$50,269 and \$63,777, respectively).

HOUSEHOLD INCOME City of Live Oak, Live Oak Market Area, Sutter County and State of California 2009				
Income	City of Live Oak	Live Oak Market Area	Sutter County	State of California
Less than \$15,000	23.9%	20.7%	12.5%	9.8%
\$15,000 - \$24,999	17.0%	16.5%	11.0%	8.1%
\$25,000 - \$34,999	12.6%	11.4%	12.0%	8.8%
\$35,000 - \$49,999	12.9%	13.2%	14.2%	12.3%
\$50,000 - \$74,999	20.1%	21.2%	19.3%	18.9%
\$75,000 - \$99,999	9.3%	10.4%	15.8%	14.4%
\$100,000 - \$149,999	2.7%	3.6%	9.8%	14.5%
\$150,000 - \$199,999	1.1%	1.3%	2.8%	5.8%
\$200,000 or More	0.4%	1.8%	2.8%	7.3%
Total	2,336	3,343	33,411	12,798,510
Median Household Income	\$31,663	\$36,639	\$50,269	\$63,777

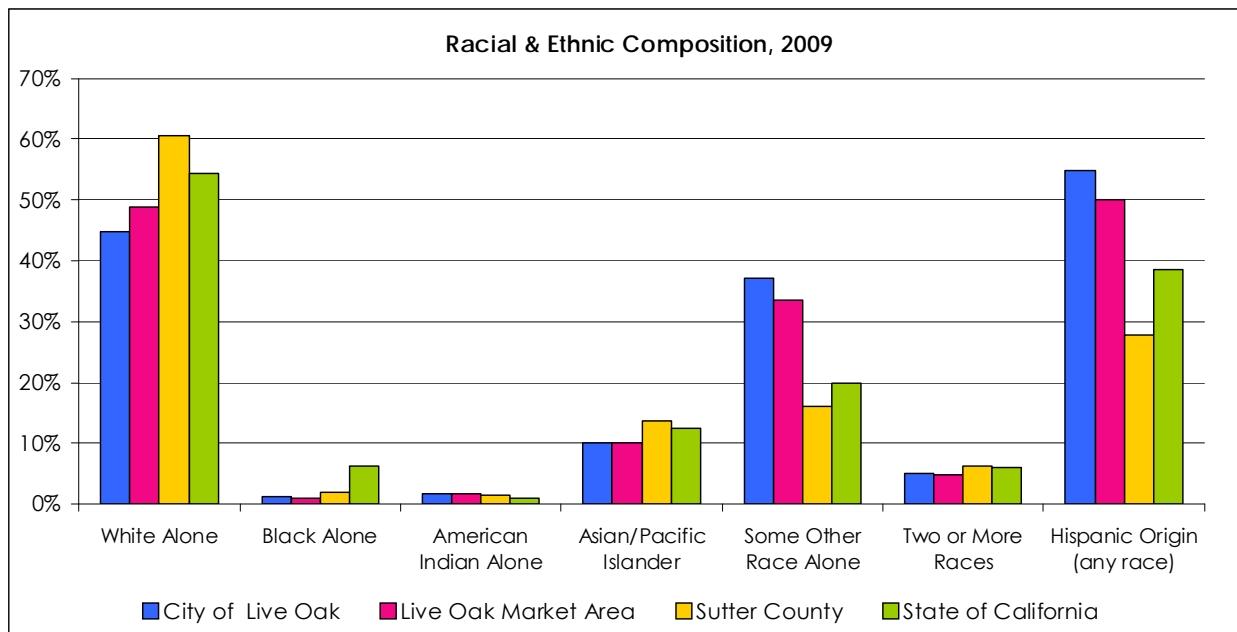


Source: ESRI BIS

## EXHIBIT 1.04 Racial Composition

The largest share of Live Oak Market Area residents are white (49%). Ten percent (10%) of the Market Area population is Asian and a third (34%) is some other race (i.e., other than white, black, American Indian or Asian). Half of the population in the City and Market Area is Hispanic; compared to 28% in the County and 39% in the State.

RACIAL & ETHNIC COMPOSITION City of Live Oak, Live Oak Market Area, Sutter County and State of California 2009				
Race/Ethnicity	City of Live Oak	Live Oak Market Area	Sutter County	State of California
White Alone	44.8%	48.8%	60.6%	54.4%
Black Alone	1.2%	1.0%	1.9%	6.2%
American Indian Alone	1.8%	1.8%	1.5%	0.9%
Asian/Pacific Islander	10.0%	10.0%	13.7%	12.5%
Some Other Race Alone	37.3%	33.5%	16.2%	19.9%
Two or More Races	5.0%	4.9%	6.2%	6.1%
Hispanic Origin (any race)	54.9%	50.1%	27.8%	38.5%
Total	8,580	11,484	99,954	38,391,568



Source: ESRI BIS



## EXHIBIT 1.05 Demographic Snapshot

The following chart summarizes major demographic and housing indicators within each of the four geographic areas.

DEMOGRAPHIC & HOUSING SNAPSHOT City of Live Oak, Live Oak, Market Area, Sutter County and State of California 2009				
Demographic Indicator	City of Live Oak	Live Oak Market Area	Sutter County	State of California
Population				
2009 (estimate)	8,580	11,484	99,954	38,391,568
2014 (forecast)	10,191	13,644	114,149	40,982,373
Avg. Ann. % Change ('00 to '09)	4.19%	4.24%	2.96%	1.48%
Avg. Ann. % Change ('09 to '14)	3.76%	3.76%	2.84%	1.35%
Households				
2009 (estimate)	2,336	3,343	33,411	12,798,510
2014 (forecast)	2,772	3,963	37,934	13,597,743
Avg. Ann. % Change ('00 to '09)	3.90%	3.98%	2.62%	1.25%
Avg. Ann. % Change ('09 to '14)	3.73%	3.71%	2.71%	1.25%
Average Household Size	3.54	3.34	2.95	2.93
Median Household Income	\$31,663	\$36,639	\$50,269	\$63,777
Median Age (Years)	30.1	31.4	34.9	34.4
Race				
Percent White Alone	44.8%	48.8%	60.6%	54.4%
Percent Other Race/2+ Races	55.2%	51.2%	39.4%	45.6%
Percent Hispanic	54.9%	50.1%	27.8%	38.5%
Homeownership (2008)	63.7%	65.0%	63.4%	59.1%
Educational Attainment (2008)				
Associate Degree	5.4%	6.0%	9.7%	7.5%
Four Year Degree or More	6.2%	7.6%	16.9%	29.0%

Source: ESRI BIS

## EXHIBIT 1.06 Lifestyle Characteristics

Recognizing that people who share the same demographic characteristics may have widely divergent desires and preferences, Community Tapestry data (developed by ESRI Business Information Solutions) categorizes neighborhoods throughout the nation into 65 consumer groups or segments based on a variety of demographic and socioeconomic characteristics as well as other determinants of consumer behavior. Households in the City of Live Oak and the Live Oak Market Area tend to be families with children, and often grandparents, living at home. Spending typically centers around the home and family and often includes gardening and home improvement projects, toys, games and pets.

TAPESTRY MARKET SEGMENTS City of Live Oak and Live Oak Market Area 2009						
Market Segment	% of Hholds	Hhold Type	Median Age	Median Income	Consumer Preferences & Purchases	
<b>City of Live Oak</b>						
1	Industrious Urban Fringe	99.7%	Married couples	29	\$42,901	Families who frequently have children and grandparents living at home. Own single-family detached homes and purchase toys and video games for their children. Enjoy movies, syndicated TV and Hispanic radio.
2	Prairie Living	0.3%	Married couples	41	\$42,366	Big country music fans who enjoy hunting, fishing and horseback riding. Typically residents of agricultural areas, these households often own a satellite dish and multiple pets. They serve as members of church boards and civic clubs.
<b>Total Households</b>		<b>100.0%</b>				
<b>Live Oak Market Area</b>						
1	Industrious Urban Fringe	82.5%	Married couples	29	\$42,901	Families who frequently have children and grandparents living at home. Own single-family detached homes and purchase toys and video games for their children. Enjoy movies, syndicated TV and Hispanic radio.
2	Prairie Living	15.4%	Married couples	41	\$42,366	Big country music fans who enjoy hunting, fishing and horseback riding. Typically residents of agricultural areas, these households often own a satellite dish and multiple pets. They serve as members of church boards and civic clubs.
3	Green Acres	2.1%	Married couples	41	\$63,922	Blue collar families w/ children 6-17 living in pastoral settings. These do-it-yourselfers are not afraid to tackle home improvement projects and enjoy watching football and NASCAR and going hunting and hiking.
<b>Total Households</b>		<b>100.0%</b>				

Source: ESRI BIS

## EXHIBIT 1.07 Business & Employee Market

An estimated 135 businesses operate within one mile of central Live Oak (i.e., within a one mile radius of the intersection of Pennington and Broadway Streets) and they employ 940 persons. The services sector makes up over half of employment; the bulk of those jobs, and a third of all jobs, are in educational institutions and libraries.

Employees working in and close to Live Oak are an important captive market for retail and service businesses, as they are in the area on a daily basis throughout the year and are in close proximity to retail, restaurants and service establishments. Market research conducted by the Building Owners and Managers Association of America demonstrates that office workers (as one segment of the workforce) spend between 10 and 15 percent of their expendable income in and near to their places of work.

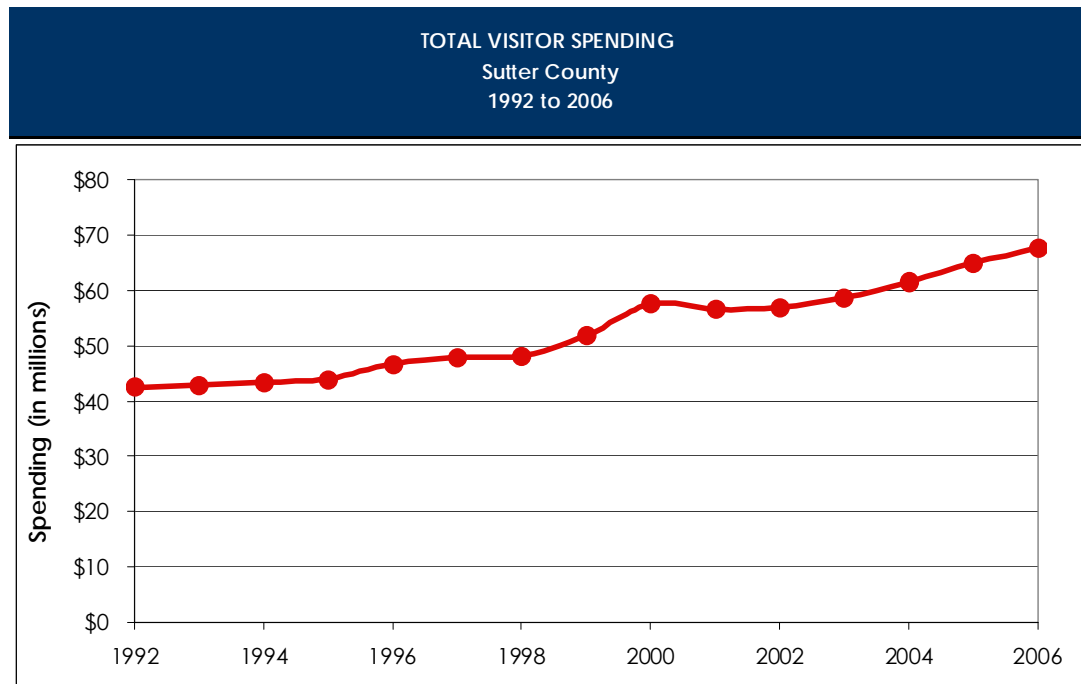
BUSINESSES AND EMPLOYMENT 1-Mile Area 2008				
Industry	Businesses		Employees	
	#	%	#	%
Agriculture & Mining	5	3.7%	14	1.5%
Construction	13	9.6%	22	2.3%
Manufacturing	4	3.0%	158	16.8%
Transportation	3	2.2%	16	1.7%
Communication	1	0.7%	0	0.0%
Electric/Gas/Water/Sanitary Services	0	0.0%	0	0.0%
Wholesale Trade	8	5.9%	38	4.0%
Retail Trade	36	26.7%	125	13.3%
Finance/Insurance/Real Estate	6	4.4%	14	1.5%
Services	53	39.3%	538	57.2%
Government	3	2.2%	15	1.6%
Other	3	2.2%	0	0.0%
<b>Total Employment</b>	<b>135</b>	<b>100.0%</b>	<b>940</b>	<b>100.0%</b>

Note: From the intersection of Pennington St. and Broadway.

Source: ESRI BIS

## EXHIBIT 1.08 Visitor Spending Trends

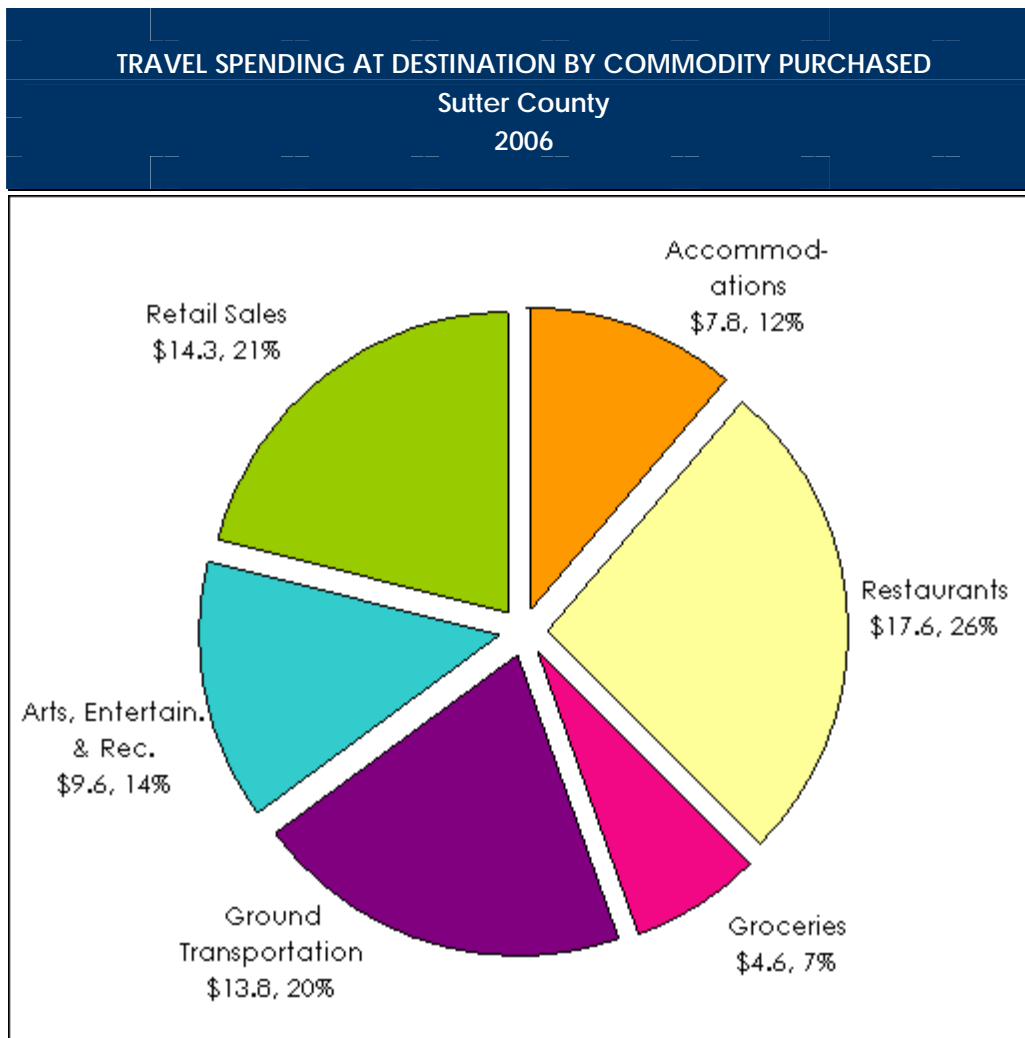
In addition to area residents and employees, visitors are another potential market for Live Oak stores and restaurants. The Sutter County visitor market – which includes Live Oak – has grown steadily over the last ten years. In 1996, visitors spent an estimated \$46.7 million in Sutter County; by 2006, visitor spending grew to \$67.7 million, a 45% increase.



Source: Dean Runyan Associates

## EXHIBIT 1.09 Visitor Spending by Commodity

Visitor spending by commodity purchased indicates how Sutter County visitors are spending at their destination. As of 2006, the largest share of spending was on Restaurants (26%), followed by Retail Sales (21%) and Ground Transportation (including gasoline) (20%). Spending on accommodations made up only 12% of visitor spending, indicating that many people traveling to Sutter County are visiting for the day.



Source: Dean Runyan Associates

## EXHIBIT 1.10 Existing Retail/Supply Balance

A comparison of retail supply (estimated from actual retail sales) and potential retail demand (based on Market Area residents' consumer expenditure patterns) indicates a sales leakage in all retail categories. A leakage occurs when retail demand exceeds supply, meaning that consumers are looking outside of the Market Area for retail goods and services. An estimated \$25.3 million in retail sales is leaving the Live Oak Market Area. Based on sales per square foot standards, this amount translates to about 106,500 square feet of space. The largest leakage of sales is occurring in the General Merchandise (\$7.6 million), Grocery (\$5.3 million) and Restaurant (\$4.0 million) categories.

In reality, the consumer marketplace is quite fluid. Even if goods are locally available, priced appropriately and of good quality, local shoppers will always do a certain amount of shopping away from home, including catalogue and Internet purchases. However, the leakage/surplus factor provides a reasonable indication of the availability of goods in the local market. It is important to note that the data reflects potential spending from residents only and does not include spending from visitors and employees working but not living in the Market Area.

EXISTING RETAIL BALANCE Live Oak Market Area 2008					
Merchandise Category	Demand/ Spending Potential	Supply/ Retail Sales	Leakage (or Surplus)	Target Sales (\$/SF)*	Potential Space
<b>Shoppers Goods</b>					
Apparel	\$2,004,830	\$0	\$2,004,830	\$209	9,592
Home Furnishings	\$1,538,038	\$878,912	\$659,126	\$199	3,312
Electronics & Appliances	\$1,292,742	\$0	\$1,292,742	\$199	6,496
Home Improvement & Gardening	\$2,424,053	\$518,093	\$1,905,960	\$140	13,614
Sporting Goods, Hobbies, Books & Music	\$887,865	\$210,247	\$677,618	\$216	3,137
General Merchandise	\$7,732,575	\$127,537	\$7,605,038	\$216	35,209
Miscellaneous Specialty Retail (florist, office supplies, gift stores, etc.)	\$1,134,772	\$356,809	\$777,963	\$216	3,602
<b>Convenience Goods</b>					
Grocery	\$13,211,838	\$7,917,721	\$5,294,117	\$395	13,403
Health & Personal Care	\$1,672,104	\$568,101	\$1,104,003	\$365	3,025
<b>Restaurants</b>					
	\$8,126,365	\$4,136,442	\$3,989,923	\$263	15,171
<b>Total Leakage</b>					<b>\$25,311,320</b>
<b>Estimated Supportable Square Footage</b>					<b>106,560</b>

\* Target sales are based on the Urban Land Institute, "Dollars and Cents of Shopping Centers."

Source: ESRI BIS; Marketek, Inc.

## EXHIBIT 1.11 Future Retail Potential

Future population growth in the Live Oak Market Area will generate increased demand for retail, restaurants and service providers. Potential sales and supportable square feet for the 2009-2019 time frame are calculated below for key retail and service categories. By 2014, the net gain among all retail categories is 33,374 square feet and by 2019, an additional 39,564 square feet can potentially be supported by population increases within the Market Area.

RETAIL EXPENDITURE POTENTIAL Live Oak Market Area 2009-2019								
Merchandise or Service Category	Per Household Expenditure	Target Sales (\$/SF)*	2009 Retail Potential		2014 Retail Potential		2019 Retail Potential	
			Sales (in mil \$)	Space (SF)	Sales (in mil \$)	Space (SF)	Sales (in mil \$)	Space (SF)
Apparel	\$1,398	\$209	\$4.7	22,362	\$5.5	26,509	\$6.6	31,425
Home Furnishings	\$1,085	\$199	\$3.6	18,232	\$4.3	21,614	\$5.1	25,622
Home Improvement	\$841	\$140	\$2.8	20,075	\$3.3	23,798	\$3.9	28,212
Misc. Specialty Retail	\$1,405	\$216	\$4.7	21,746	\$5.6	25,779	\$6.6	30,560
<b>Shoppers Goods</b>			<b>\$15.8</b>	<b>82,415</b>	<b>\$18.7</b>	<b>97,700</b>	<b>\$22.2</b>	<b>115,820</b>
Grocery	\$4,210	\$390	\$14.1	36,083	\$16.7	42,776	\$19.8	50,709
Health/Personal Care	\$721	\$365	\$2.4	6,604	\$2.9	7,829	\$3.4	9,281
<b>Convenience Goods</b>			<b>\$16.5</b>	<b>42,688</b>	<b>\$19.5</b>	<b>50,605</b>	<b>\$23.2</b>	<b>59,990</b>
<b>Restaurants</b>	<b>\$2,384</b>	<b>\$263</b>	<b>\$8.0</b>	<b>30,304</b>	<b>\$9.4</b>	<b>35,924</b>	<b>\$11.2</b>	<b>42,586</b>
<b>Entertainment</b>	<b>\$273</b>	<b>\$90</b>	<b>\$0.9</b>	<b>10,130</b>	<b>\$1.1</b>	<b>12,008</b>	<b>\$1.3</b>	<b>14,235</b>
<b>Personal Services</b>	<b>\$651</b>	<b>\$151</b>	<b>\$2.2</b>	<b>14,416</b>	<b>\$2.6</b>	<b>17,090</b>	<b>\$3.1</b>	<b>20,259</b>
<b>Total</b>			<b>\$43.4</b>	<b>179,953</b>	<b>\$51.4</b>	<b>213,327</b>	<b>\$60.9</b>	<b>252,891</b>
<b>Five Year Net Gain</b>					<b>\$8.0</b>	<b>33,374</b>	<b>\$9.5</b>	<b>39,564</b>

\* Target sales are based on the Urban Land Institute, "Dollars and Cents of Shopping Centers."

Sources: ESRI BIS; Urban Land Institute; Marketek, Inc.

## EXHIBIT 1.12 Existing & Future Retail Potential Summary

Within the Live Oak Market Area there is an estimated 179,499 square feet of potential demand for new retail space over the next ten years: 106,560 square feet is immediate demand for space based on existing leakage of sales and 72,939 is based on projected population growth. Live Oak's ability to capture a portion of this potential demand is dependent on numerous factors including developable land, active marketing and changes in retail supply in other locations within the Market Area.

RETAIL EXPENDITURE POTENTIAL Live Oak Market Area 2009-2019				
Merchandise/ Service Category	2008	2009-2014	2014-2019	Total Potential New Retail Space
	Existing Unmet Demand	Market Area Demand	Visitor Demand	
	(SF)	(SF)	(SF)	
<b>Shoppers Goods</b>				
Apparel	9,592	4,147	4,916	18,656
Home Furnishings	9,808	3,381	4,009	17,198
Home Improvement	13,614	3,723	4,414	21,751
Misc. Specialty Retail	41,947	4,033	4,781	50,761
<b>Subtotal</b>	<b>74,962</b>	<b>15,285</b>	<b>18,120</b>	<b>108,367</b>
<b>Convenience Goods</b>				
Grocery	13,403	6,692	7,933	28,028
Health/Personal Care	3,025	1,225	1,452	5,702
<b>Subtotal</b>	<b>16,427</b>	<b>7,917</b>	<b>9,385</b>	<b>33,730</b>
<b>Restaurants</b>	15,171	5,620	6,663	27,454
<b>Entertainment</b>	NA	1,879	2,227	4,106
<b>Personal Services</b>	NA	2,674	3,169	5,843
<b>Total</b>	<b>106,560</b>	<b>33,374</b>	<b>39,564</b>	<b>179,499</b>

Source: ESRI; Urban Land Institute; Marketek, Inc.



## EXHIBIT 1.13 Selected Business Store Sizes

In an effort to put the demand estimates into context, the following chart shows the median size of several types of businesses by store type.

TYPICAL SIZE OF SELECTED BUSINESSES				
Merchandise or Service Category/Business	Median	National	Local Chain	Independent
<b>Specialty Retail</b>				
Appliances	5,956	6,292	5,911	~
Art Gallery	1,802	~	1,802	1,907
Beauty Supplies	1,807	1,634	2,450	1,829
Bike Shop	3,440	~	~	2,596
Bookstore	10,093	23,000	9,990	2,740
Cameras	2,000	2,000	~	~
Children's Wear	3,913	4,879	3,054	2,105
Family Shoe Store	4,000	4,113	5,100	2,460
Family Wear	8,000	8,500	3,474	5,132
Gift/Cards	4,200	4,900	3,780	1,653
Hardware	13,200	13,900	~	~
Home Accessories	7,595	10,215	5,365	2,462
Jewelry	1,500	1,610	1,968	1,200
Luggage	2,500	2,499	~	~
Men's Clothing Store	3,500	4,319	3,065	2,750
Pet Supplies	7,995	17,600	3,201	3,200
Record/Tapes	4,464	6,178	~	2,017
Sporting Goods	8,465	22,000	4,980	2,995
Toys	7,855	12,000	~	3,344
Women's Ready to Wear	4,400	4,503	3,960	2,145
<b>Convenience</b>				
Drugstore/Pharmacy	10,920	10,860	16,668	4,977
Supermarket	50,420	49,071	51,495	23,300
Bakery	1,990	4,000	~	1,700
Gourmet Grocery	18,000	~	~	~
Wine/Liquor	3,440	~	6,237	2,920
<b>Personal Services</b>				
Day Spa	2,875	~	2,563	3,060
Women's Hair Salon	1,400	1,450	1,250	1,361
Nail Salon	1,200	~	1,200	1,200
Health Club	10,249	9,548	5,508	10,249
Mail/Packaging/Photocopying	1,278	1,240	~	1,236
Tailor/Alteration	950	~	900	1,035
Video Rental	6,000	6,333	4,240	4,733
Drycleaners	1,800	~	1,800	1,649
Day Care	4,000	~	~	3,901
Laundry	2,114	~	2,150	1,955
<b>Restaurants</b>				
Restaurant with Liquor	5,204	6,669	5,600	3,362
Restaurant without Liquor	3,581	6,500	3,025	2,625
Bar/Cocktail Lounge	3,821	~	~	3,821
Ice Cream Parlor	1,137	1,144	1,137	1,116
Coffee/Tea	1,578	1,650	1,624	1,400
Entertainment - Cinema	35,022	37,161	35,022	21,250

Source: Urban Land Institute, "Dollars and Cents of Shopping Centers"

## EXHIBIT 1.14 Spending Potential

Expenditure data is helpful in revealing what prices area residents will pay and/or the level of their discretionary income they are willing to devote to various goods or services. A spending potential index (SPI) of 100 indicates that consumers buy at a rate equal to the national average; an SPI greater or less than 100 means that consumer buy above or below the national average, respectively. In the Live Oak Market Area, consumers spend below the national average. Lower spending, however, does not indicate reduced demand but implies the need for quality, reasonably priced retail goods and services.

SPENDING POTENTIAL INDEX (SPI) OF SELECTED GOODS AND SERVICES Live Oak Market Area 2008			
Merchandise/Service Category	SPI	Merchandise/Service Category	SPI
Apparel	55	Financial Services	
Men's	57	Investments	53
Women's	50	Auto Loans	72
Children's	66	Health	
Footwear	47	Nonprescription Drugs	68
Watches & Jewelry	66	Prescription Drugs	62
Other Apparel	69	Eyeglasses and Contact Lenses	65
Computer		Home	
Computer/Hardware for Home	67	Home Improvement	
Software/Accessories for Home	69	Maintenance/Remodeling Serv	66
Entertainment & Recreation	66	Maintenance/Remodeling Supp	74
Entertainment Fees & Admissions	62	Household Furnishings	
Membership Fees	60	Household Textiles	66
Theater/Movies/Ballet/Opera	65	Furniture	69
Sporting Events	65	Floor Coverings	64
Recreational Lessons	60	Major Appliances	69
Television & Sound Equipment	65	Housewares	63
Cable Television	62	Small Appliances	66
Televisions	69	Luggage	64
VCR/Video Camera/DVD Player	66	Telephone & Accessories	50
Video Cassettes and DVDs	69	Child Care	67
Video Game Hardware/Software	65	Lawn & Garden	62
Satellite Dishes	77	Moving/Storage	76
Video/DVD Rental	71	Housekeeping Supplies	66
Audio Equipment	65	Insurance	
Pets & Supplies	71	Homeowners/Renters	65
Toys & Games	68	Vehicle	67
Recreational Vehicles & Fees	73	Life	61
Sports/Exercise Equipment & Supplies	61	Health	63
Photo Equipment & Supplies	66	Personal Care Products	68
Books/Magazines/Subscriptions	60	School Books & Supplies	63
Food & Beverages	66	Smoking Products	61
Groceries	67	Transportation	
Bakery & Cereal Products	66	Vehicle Purchases	72
Meats, Poultry, Fish & Eggs	67	Gas & Oil	71
Dairy Products	67	Vehicle Maintenance & Repair	70
Fruits & Vegetables	67	Travel	
Other Foods at Home	67	Air Fare	67
Meals at Restaurants	64	Hotels/Motels	63
Alcoholic Beverages	61	Rental Cars	67
Nonalcoholic Beverages at Home	69	Food/Drink	66

Source: ESRI BIS

# Community Input

## OPINION RESEARCH

An electronic shopper survey was completed by the Live Oak community during the month of March. Surveys were posted on the City website and publicized through the local newspaper. The survey results are fully detailed in Appendix A, with highlights below.

Live Oak Shopper Survey Highlights:

- Three hundred and forty-five (345) people participated in the survey.
- Eighty-eight percent (88%) of respondents reported doing most of their non-grocery shopping in Yuba City. Other popular shopping locations include Sacramento (17%) and the Internet (12%).
- By far, the most common reasons behind shopping location are selection and price, cited by 74% and 60% of respondents, respectively.
- When people choose to shop or do business in Live Oak, their primary reasons are its convenient location (selected by 72% of respondents), to support local businesses (64%) and lesser traffic and crowds (58%). Deterrents to shopping in Live Oak include a poor selection of goods and services (indicated by 83% of respondents), high prices (77%) and the poor appearance of stores or the shopping district (59%).
- The types of merchandise most frequently cited as being needed in Live Oak and the number and percentage of respondents selecting them included:
  - Men (77%) and women's (81%) casual apparel
  - Teen and young adult apparel (76%)
  - Shoes (73%)
  - Garden supplies (71%)
  - Appliances (54%)
  - Linens & towels (52%)
  - Sporting goods (48%)
  - Pet supplies (45%)
- Ninety-two percent (92%) of respondents felt that Live Oak lacks a quality grocery store and 65% felt a bakery is needed and would be supported.
- Eighty-two percent (82%) of respondents would like more restaurants and eating places in Live Oak. By far the most requested type of restaurant was fast food (72%), followed by Chinese food (59%), family dining (58%) and a steakhouse (50%).
- Regarding services in Live Oak, top service needs were dry cleaning/laundry (identified by 68% of respondents), vision care (67%), general health care (66%), a copy center (60%), a gym/exercise studio (57%), a movie theater (55%) and DVD/video rental (49%).

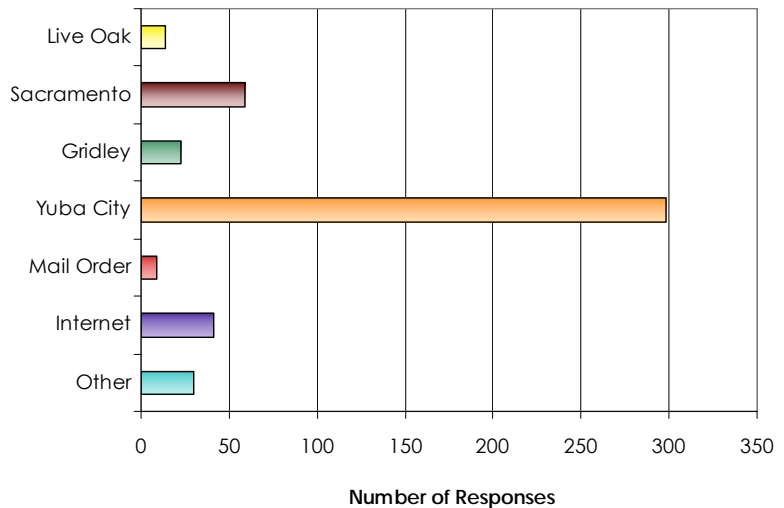
- As Live Oak continues to grow and change, respondents want it to keep its friendly, small town atmosphere and its rural nature. In terms of desired changes, they would like to see transportation-related improvements and an improved appearance, from cleaning up Highway 99 to addressing dilapidated or vacant buildings to sprucing up storefronts and public space downtown.
- When asked what image or identity they would like to see Live Oak develop, respondents described it as a clean, family-friendly town where community members care about one another. They would like it to be seen as an inviting place that attracts visitors and offers stores and restaurants to meet the needs of local residents.

# Appendix A: Shopper Survey Results

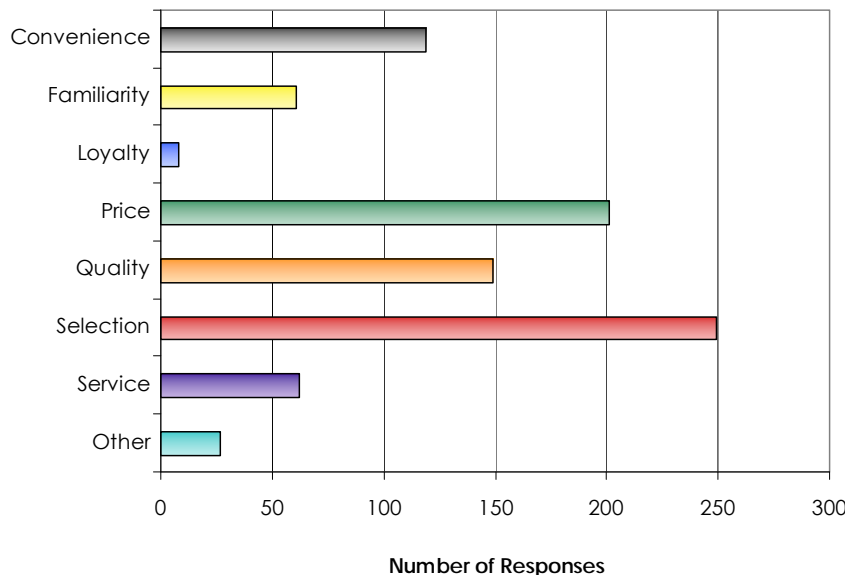
## Section 1: Shopping Habits

1. Where do you do most of your non-grocery shopping (e.g., apparel, home furnishings, sporting goods, etc.)? (339 respondents)

- The majority of respondents (298 or 88%) do non-grocery shopping in Yuba City.
- Sacramento was the second most popular shopping location and was selected by 59 respondents (17%). The internet followed with 12% (41 respondents).
- Only 14 respondents (4%) selected Live Oak as their primary shopping destination.
- Popular responses in the “other” category include Chico (15 respondents/4%) and Roseville (8 respondents/2%).



2. What are the primary reasons for shopping where you do? (Please select your top 3 reasons). (336 respondents)

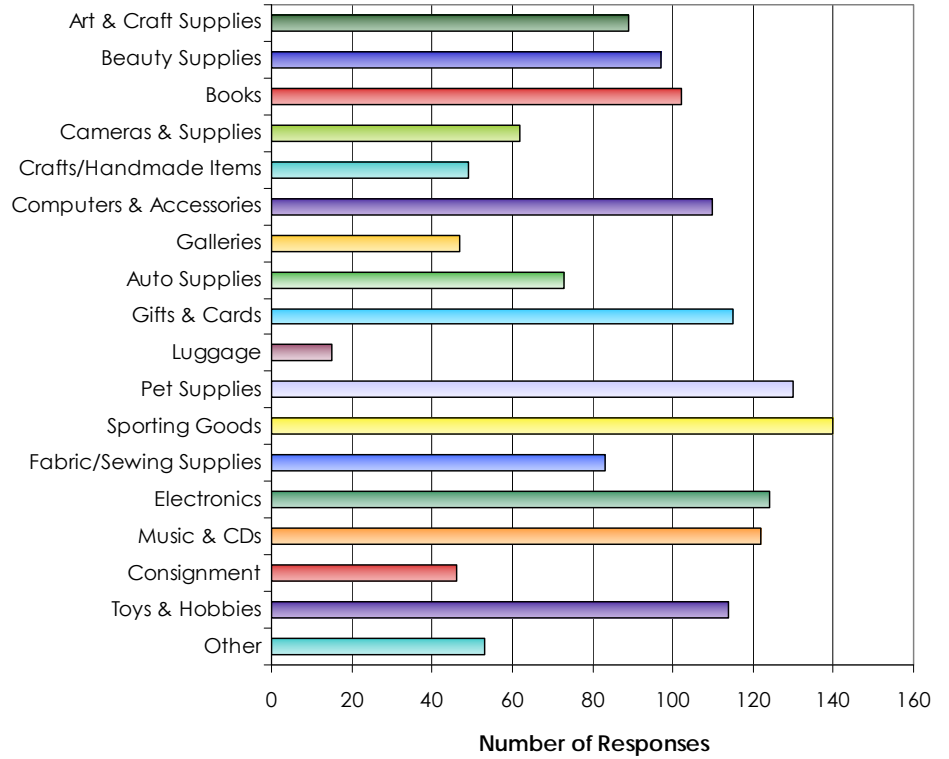


- The most common reasons motivating shopping location are selection, chosen by 74% of respondents, and price, selected by 60% of respondents.
- Other popular factors behind shopping location include quality (44%), convenience (35%) and service (19%).

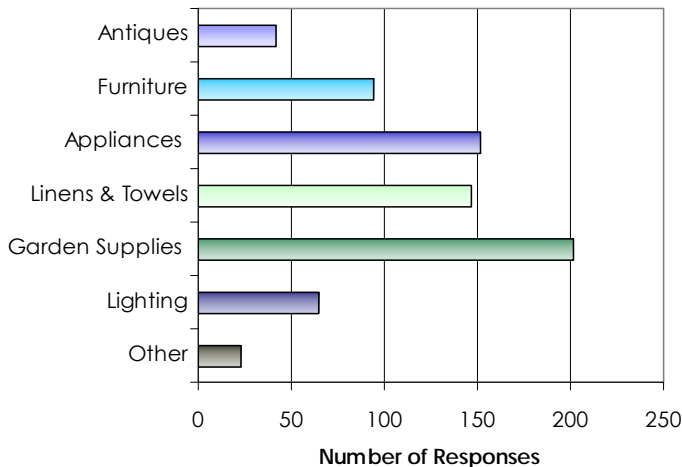
## Section 2: Shopping Needs in Live Oak

### 3. What types of SPECIALTY MERCHANDISE do you think are needed and would be supported in the Live Oak area if they existed? (Check all that apply.) (290 respondents)

- ▶ Sporting goods and pet supplies are the top two types of specialty merchandise identified as lacking (by 48% and 44% of respondents, respectively).
- ▶ Other top selections include electronics (43%), music & CDs (42%), gifts and cards (40%), toys and hobbies (39%) and computers and accessories (38%).
- ▶ The 53 responses in the “other” category included groceries, drug store items, fast food, movie rental, household goods, family activities and a library.



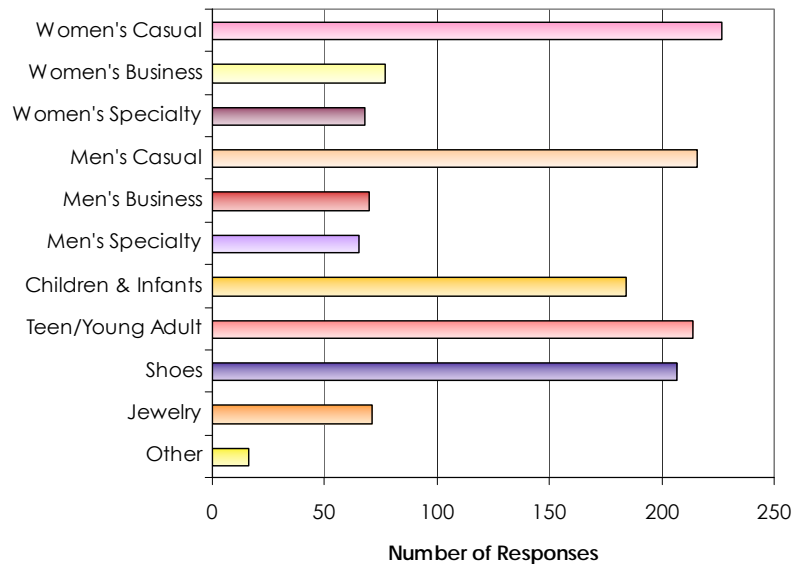
### 4. What kinds of HOUSEHOLD FURNISHINGS do you think are needed and would be supported in the Live Oak area if they existed? (Check all that apply.) (284 respondents)



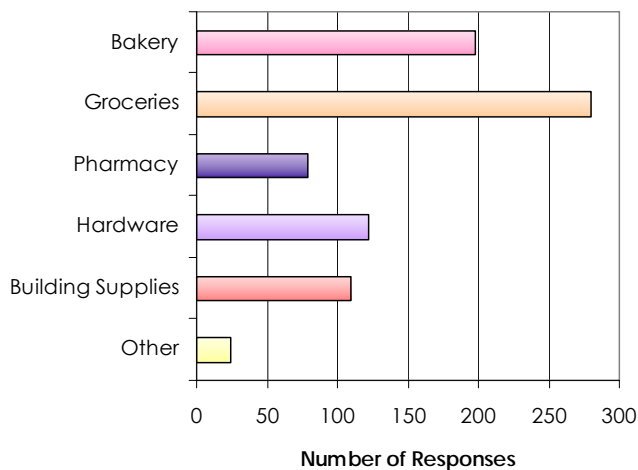
- ▶ Seventy-one percent (71%) of respondents checked garden supplies as missing or lacking in Live Oak, followed by appliances (54%) and linens and towels (52%).
- ▶ Responses listed in the “other” category included home décor and a home improvement store.

5. What kind of APPAREL stores do you think are needed and would be supported in the Live Oak area if they existed? (Check all that apply.) (282 respondents)

- Women's and men's casual apparel are the top apparel items listed by respondents as missing or lacking in Live Oak (81% and 77%, respectively).
- Other popular responses include teen/young adult (76%), shoes (73%) and apparel for children and infants (65%).
- In the "other" category, respondents indicated the need for a department store selling several types of apparel.



6. What kinds of CONVENIENCE MERCHANDISE do you think are needed and would be supported in the Live Oak area if they existed? (Check all that apply.) (304 respondents)



- A grocery store tops this list, with 92% of respondents selecting groceries as missing or lacking in Live Oak.
- Other popular responses included a bakery items (65%), hardware (40%) and buildings supplies (36%).
- Twenty-four people checked "other," and responses included a farmer's market/fruit and vegetable stand, a coffee shop, an ice cream shop and a discount department store such as Wal Mart.

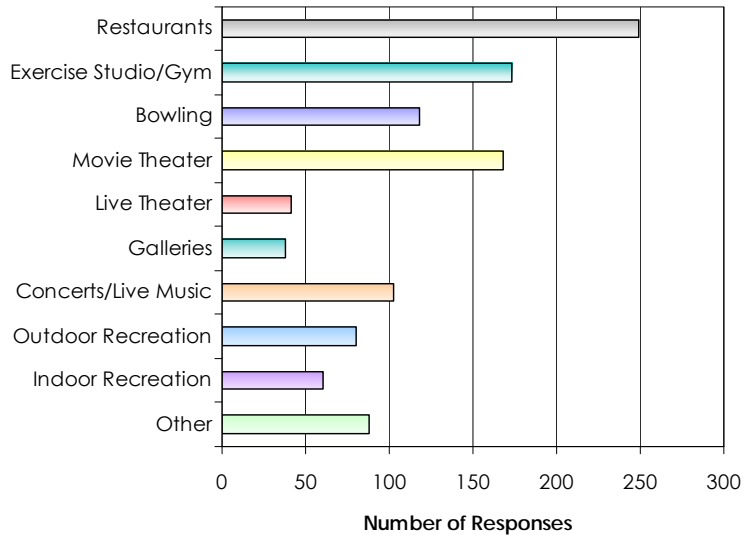
7. Some of this merchandise may be available locally. Please explain why you may not be buying these products locally. (200 respondents)

- The reasons most frequently cited for not shopping in Live Oak are high prices (66%), lack of selection (44%) and poor quality of goods (22%).
- Several respondents mentioned the lack of a high quality grocery store in Live Oak (23%).
- Other responses included the appearance of downtown stores, poor service, inconvenient hours and the need for advertisement/promotions.

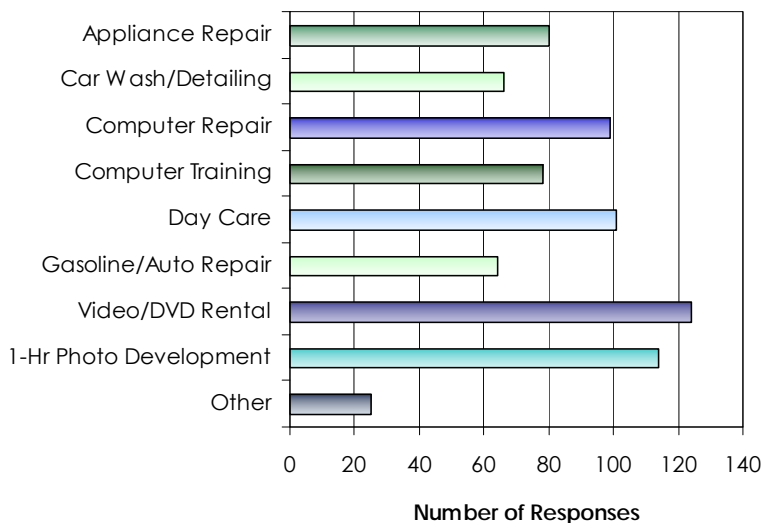
### Section 3: Services in Live Oak

8. What kinds of LEISURE/ENTERTAINMENT services do you think are needed and would be supported in the Live Oak area if they existed? (Check all that apply.) (305 respondents)

- Restaurants were most frequently identified as needed in Live Oak (82% of respondents).
- An exercise studio and a movie theater followed, and were selected by 57% and 55% of respondents, respectively.
- Top responses in the “other” category included a park with sports fields, tennis and basketball courts and a pool, an outdoor skate park, an indoor skating rink, bike/hiking/jogging trails, an arcade, youth sports leagues and activities, adult sports leagues, activities by the river (i.e., fishing, boating, etc.) and community events and festivals.



9. What kinds of GENERAL SERVICES are needed and would be supported in the Live Oak area if they existed? (Check all that apply.) (253 respondents)



- The most popular service need was DVD/video rental, identified by 49% of respondents, followed by one-hour photo development (45%).
- Other top responses included day care (40%), computer repair (39%) and appliance repair (32%).
- Twenty-five respondents selected the “other” category and write-in responses included fast food, dog wash/pet grooming, plumbing, oil change and after-school programs.

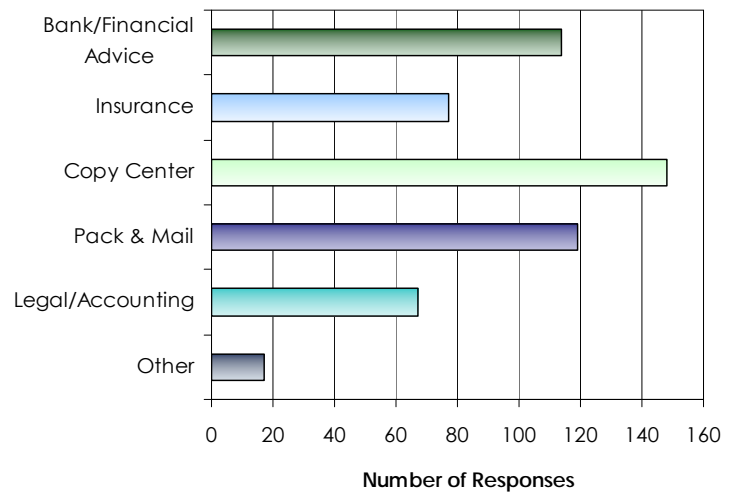


**10. What kinds of PERSONAL SERVICES do you think are needed and would be supported in the Live Oak area if they existed? (Check all that apply.) (220 respondents)**

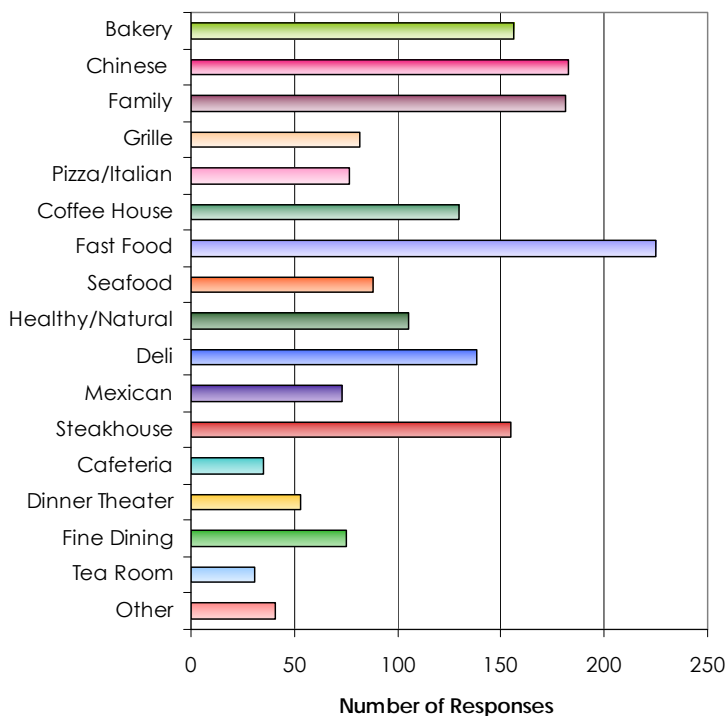
- Over half of respondents identified the need for dry cleaning/laundry services (149 respondents/68%) and hair/beauty salons (123 respondents/56%).
- Tailoring/alteration services were selected by 80 respondents (36%).
- Thirty respondents (14%) checked "other," and services listed included a nail salon, a tanning salon and spa/massage, gardening and maid services.

**11. What BUSINESS/PROFESSIOINAL services are needed and would be supported in the Live Oak area if they existed? (Check all that apply.) (246 respondents)**

- The most popular response was a copy center (60%), followed by pack & mail (48%) and bank/financial advice (46%).
- Responses listed in the "other" category included hourly computer/printer use and senior services and activities such as bingo.



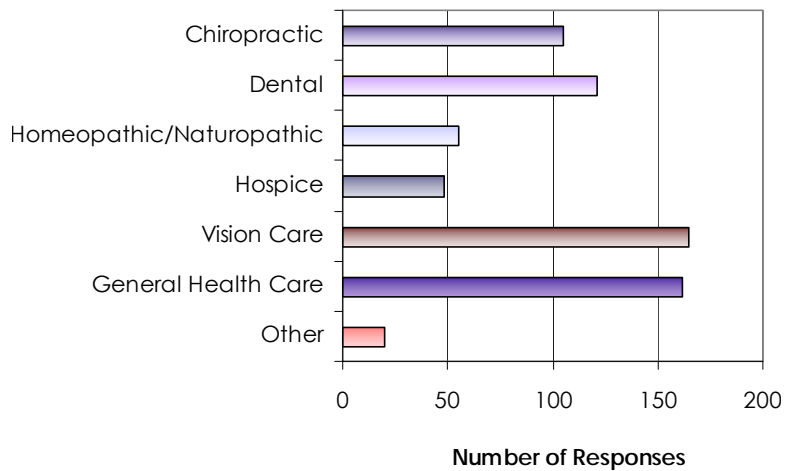
**12. In your opinion, what types of RESTAURANTS AND EATING PLACES are needed in the Live Oak area and would be supported if they existed? (Check all that apply.) (311 respondents)**



- Top restaurant types identified as needed in Live Oak include fast food (72%), Chinese food (59%) and family dining (58%).
- Other popular choices were a bakery (50%), a steakhouse (50%), a deli (44%) and a coffee house (42%).
- In the "other" category, respondents identified the need for Indian food, a buffet, a brewery/sports bar and an ice cream shop. Specific restaurants mentioned included Starbucks, Olive Garden, Taco Bell, Burger King, A&W, McDonald's, Arby's, Carl's Jr., and Pizza Hut.

**13. What HEALTH SERVICES do you think are needed in the Live Oak area and would be supported if they existed? (Check all that apply.) (247 responses)**

- ▶ Vision care and general health care were the two types of health services selected by most respondents (67% and 66%, respectively).
- ▶ Other popular responses included dental care (49%) and chiropractic care (43%).
- ▶ In the “other” category, responses included urgent care, mental health care and a hospital.



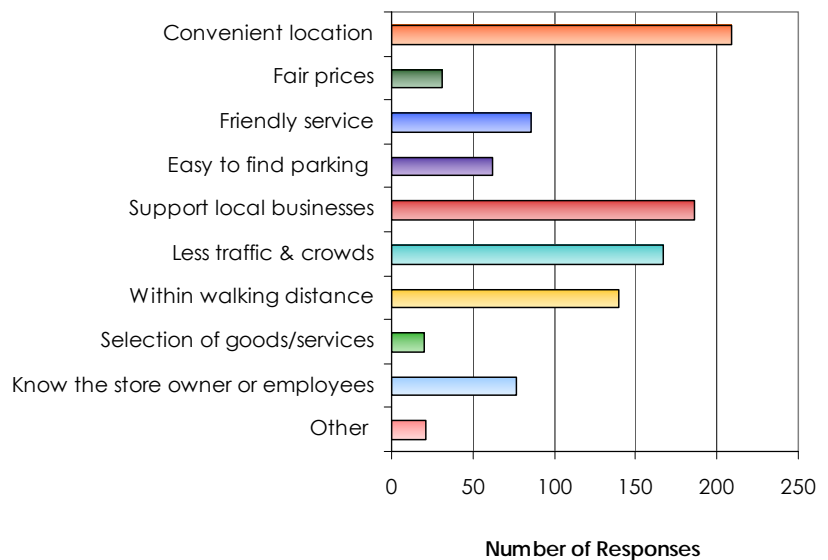
**14. Some of these services may be available locally. Please explain why you may not choose local service providers, if you are aware of their services. (111 respondents)**

- ▶ The top reason respondents cited for not using local services was the lack of selection (21%), followed by high prices (20%).
- ▶ Other popular reasons included relationships with doctors/health care providers in other areas and that local health care providers do not accept the respondent's form of insurance (noted by 15% and 14% of respondents, respectively).

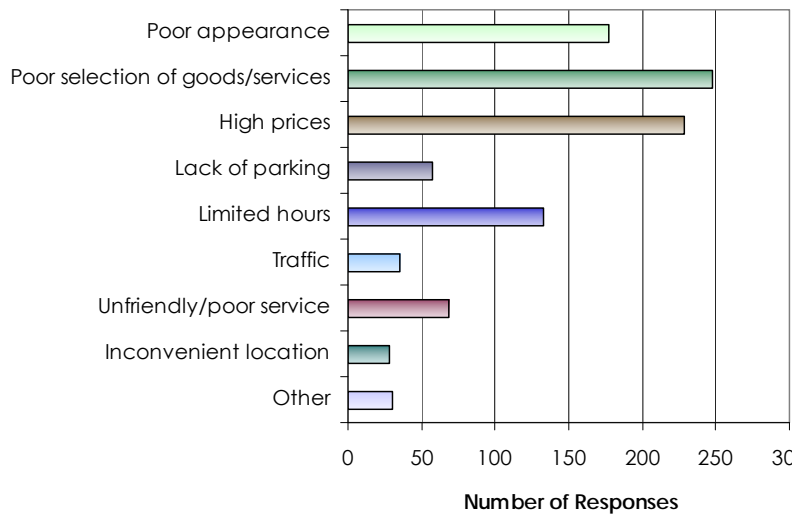
**Section 4: Shopping and Doing Business in Live Oak**

**15. Currently, what are the major ADVANTAGES of shopping or doing personal business (e.g., banking) in Live Oak? (Please check the top 3.) (290 respondents)**

- ▶ Seventy-two percent (72%) of respondents said its convenient location was the major advantage to shopping and doing business in Live Oak.
- ▶ Other major advantages included supporting local businesses (64%), less traffic and crowds (58%) and being within walking distance (48%).



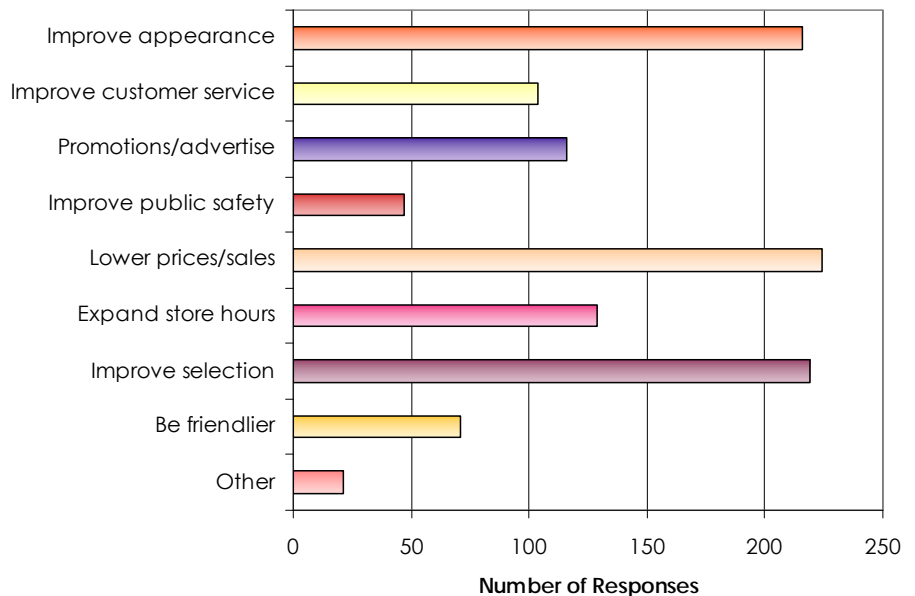
**16. Currently, what are the major DISADVANTAGES of shopping or doing personal business (e.g., banking) in Live Oak? (Please check the top 3.) (299 respondents)**



- Respondents identified the major disadvantage to shopping or doing personal business in Live Oak as a poor selection of goods/services (83%), followed by high prices (77%).
- Other disadvantages included poor appearance (59%) and limited hours (45%).
- A disadvantage cited in the “other” category included odor (in regard to the grocery store).

**17. What can Live Oak merchants do to improve their stores? (Please check the top 3.) (303 respondents)**

- Seventy-four percent (75%) of respondents thought Live Oak merchants should lower prices or have sales. Other top responses included improved selection (72%) and improved appearance (71%).
- Expanded store hours were selected by 43% of respondents and promotions/advertising and improved customer service were both selected by over a third (38% and 34%, respectively).



**18. What are the best times for you to shop during the week (MONDAY – FRIDAY)? (305 respondents)**

- Most respondents (216 or 71%) selected “After 5:00 PM.” The remaining 89 respondents (29%) prefer to shop from 8:30 AM to 5:00 PM.

**19. What are the best times for you to shop on the weekend? (282 respondents)**

- ▶ Saturday afternoon was the most popular weekend shopping time, and was selected by 140 respondents (50%).
- ▶ Twenty-seven percent (27% or 77 respondents) prefer to shop on Saturday morning and 65 respondents (23%) prefer Sunday morning.
- ▶ Thirty-two respondents (32 or 11%) selected "other," and popular responses included anytime on the weekend (18 respondents) and Sunday morning (6 respondents).

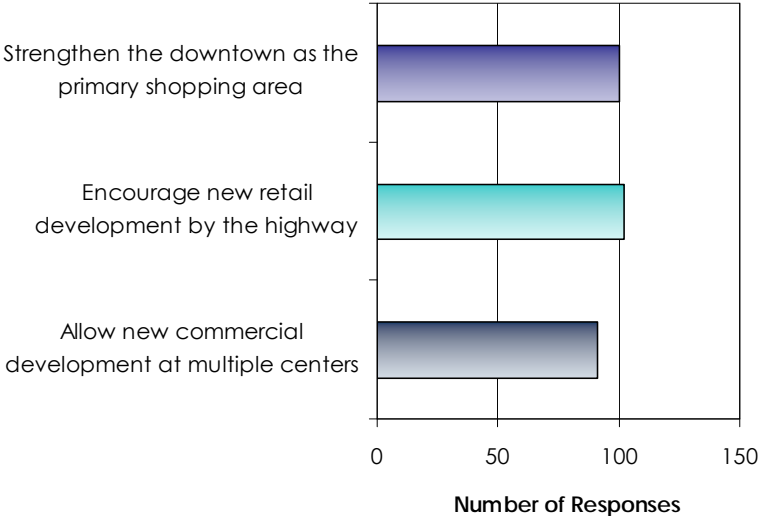
**Section 5: Your Thoughts About Live Oak**

**20. As Live Oak continues to grow and change, if you could keep one thing the same about Live Oak, what would it be? (241 respondents)**

- ▶ The largest number of respondents (91 or 38%) identified the friendly, small town atmosphere as the thing they would most like to keep the same.
- ▶ Thirty-one respondents mentioned Live Oak's small size and rural nature.
- ▶ Other popular responses included the local stores and restaurants (22 respondents), parks and open space (19), the low crime rate (13) and the town's live oak tree (9).

**21. As Live Oak's shopping and commercial base grows, please tell us your preference for the location of new commercial development/business. (293 respondents)**

- ▶ Responses were almost evenly split between the three development locations. Thirty-five percent (35%) selected "encourage new retail development by the highway."
- ▶ Thirty-four percent (34%) selected to "strengthen the downtown as the primary shopping area," and less than a third (31%) picked to "allow new commercial development at multiple centers."



**22. If you could change one thing about Live Oak, what would it be? (257 respondents)**

- ▶ A quarter of respondents (67 people or 25%) listed the need for traffic reduction and transportation improvements, including additional stop lights and better public transit.
- ▶ Over a fifth of respondents (57 people or 22%) identified the need to improve Live Oak's appearance, from cleaning up Highway 99 to addressing dilapidated buildings to sprucing up storefronts and public space downtown.

- Other top improvement areas include a wider store and restaurant selection (44 respondents), increased commercial development (especially along Highway 99) (21), more entertainment for families, teens and youth (16) and a reduction in crime (14).
- Respondents also mentioned school improvements (9), better sidewalks and streetscaping (8) and more parks (7).

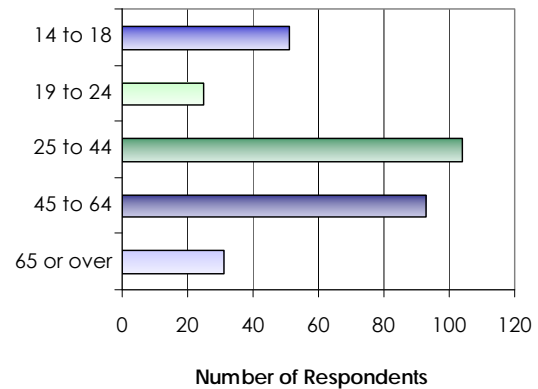
**23. What identity or image would you like to see Live Oak develop for itself as a unique community? (210 respondents)**

- Respondents would like Live Oak to be seen as a clean, family-friendly, small town where community members care about one another.
- Respondents would like Live Oak to develop as an inviting place that attracts shoppers travelling through the area and as a business-friendly environment where local stores serve the needs of residents. Several respondents noted a desire to develop as a “green” community.
- Important aspects of the City’s identity include its agricultural history, its diverse population, its friendly atmosphere and the image of the live oak.
- Typical responses include:
  - “Small town feel with large city amenities”*
  - “Small town, big heart”*
  - “Modern small city”*

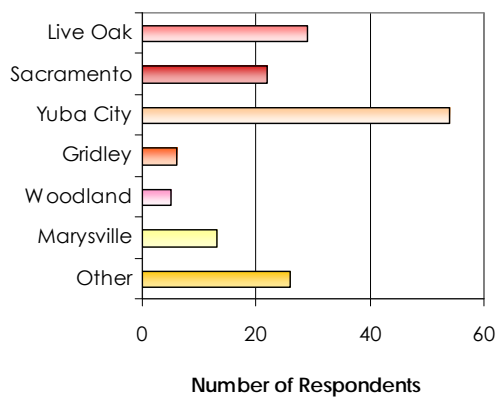
**Section 6: General Information**

**24. Please check your age. (304 respondents)**

- A third of respondents (34%) were between the ages of 25 to 44; another 31% were between 45 and 64.



**25. If you work outside the home, please tell us the city or town where you work. If you are not working at this time, please continue to the next question. (155 respondents)**



- Of the 155 respondents, the largest share work in Yuba City (35%), followed by Live Oak (19%).
- Other popular job locations included Sacramento, Gridley, Woodland and Marysville.
- Seventeen percent (17%) of respondents work in other locations.

**26. Do you live in one of Live Oak's new subdivisions (Ryland Homes, KB Homes, Premier, etc.)? (267 respondents)**

- ▶ Most respondents answered "no" (171 people or 64%).
- ▶ Thirty-six percent (36% or 96 respondents) answered "yes."

**27. Please share any other comments below. (124 respondents)**

- ▶ *"I am glad for change in Live Oak and am willing to be a part of that change."*
- ▶ *"We need some attractive signage for the local businesses to make the town come alive. The marquee at the entrance is nice, but we need more."*
- ▶ *"I would love to be able to grab a bite to eat locally or walk to a grocery store...to feel like I am putting something back into my community."*
- ▶ *"Live Oak is a nice place to live...we just need a few more things to do in the area...it would be nice to be able to just go down the road for good food or weekend shopping."*
- ▶ *"I enjoy living in Live Oak but think we need to spruce it up a bit...with a little hard work we can make this a place people want to come."*