



COMMUNITY PROFILE



National City
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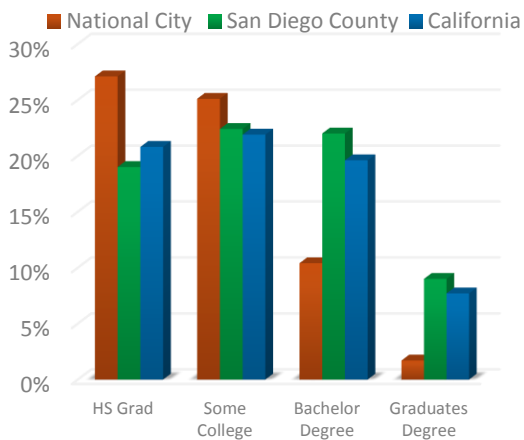
COMMUNITY PROFILE

THE COMMUNITY

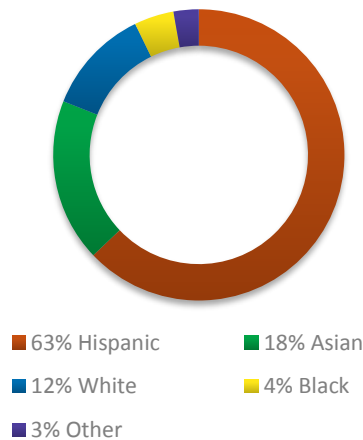
National City, incorporated in 1887, is the second oldest city in San Diego County. The city is located in the South Bay Region of San Diego County just five miles south of downtown San Diego. National City is served by north/south interstates I-5 in the west and I-805 in the east, while State Route 54 travels east/west along the city’s southern border providing residents, commuters, and visitors easy access in and out of the community. National City is largely built-out and home to a dense population of more than 61,000 residents situated in more than 16,000 households within 7.28 square miles. National City serves as a destination city attracting consumers from all over the South San Diego region to attractions such as the “Mile of Cars” and the Westfield Plaza Bonita, an indoor regional mall. Whether you want to spend the day in Mexico, fun in the sun in the marina, visiting the nearby zoo and safari park, or go out shopping and dining - National City is truly *‘In the Center of It All.’*

DEMOGRAPHICS

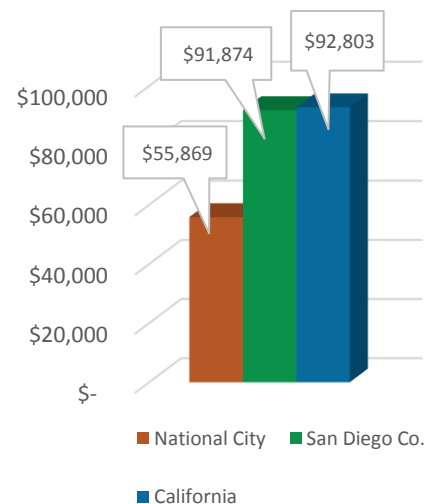
Education



Ethnic Breakdown



Average HH Income



➤ Population	61,793
➤ Daytime Population	63,069
➤ Average household income	\$55,869
➤ Households	16,477
➤ Occupancy size per household	3.75
➤ Average age	36.3
➤ % of housing units that are owner occupied	35.4
➤ % of residents that possess a college degree	12%
➤ % of residents that possess a high school degree or above	71%
➤ Mean travel time to work (Minutes)	26.4
➤ Land area (Square miles)	7.28

Source: California Department of Finance, U.S. Census Bureau, STI: PopStats, and HdL Companies (Dec. 2017)



MARKET AREA

MARKET STATISTICS (Residents)

➤ Labor Force	25,509
➤ Per Capita Income	\$14,897
➤ Average Household Income	\$55,869
➤ Median Household Income	\$43,667
➤ Workplace Establishments	1,392
➤ White Collar/Blue Collar Jobs	45%/55%

Sources: STI: PopStats, STI: WorkPlace (Dec. 2017)

TOP 10 BUSINESS TYPES

(listed in alphabetical order; based on SBOE sales tax payments)

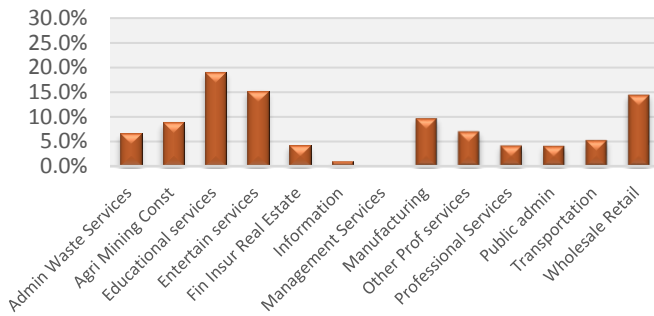
- Building Materials
- Casual Dining
- Department Stores
- Discount Department Stores
- Family Apparel
- New Motor Vehicle Dealers
- Quick-Service Restaurants
- Service Stations
- Specialty Stores
- Used Automotive Dealers

Sources: HdL Companies (Dec. 2017), SBOE-State Board of Equalization

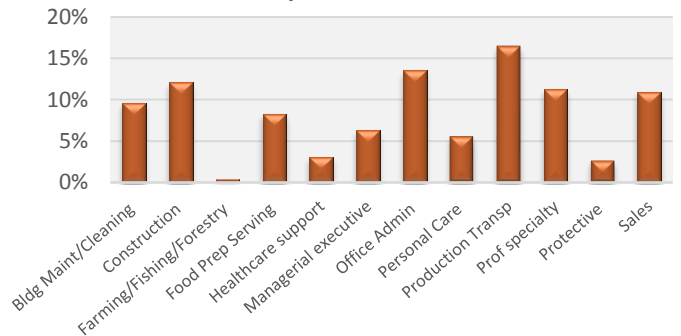
LABOR MARKET BREAKDOWN

The top industries and top occupations that residents of National City are employed within:

Industry Breakdown

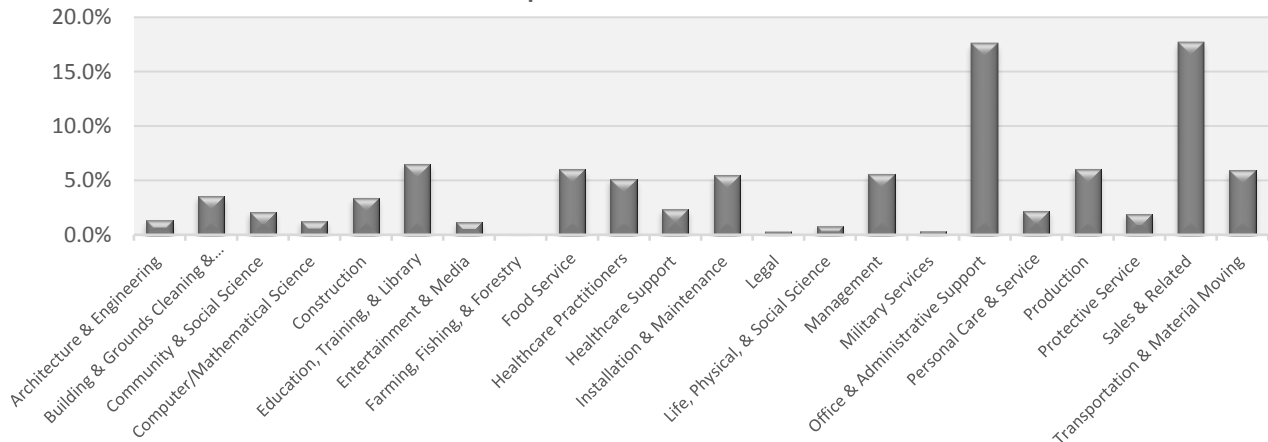


Occupational Breakdown



Top occupations within National City:

Occupational Breakdown





NATIONAL & REGIONAL BRANDS

99 Cents Only	Foot Locker	Jack in the Box	Petco
Aeropostale	Ford Motor Company	JC Penney	Popeye's Chicken
Applebee's	Forever 21	John's Incredible Pizza	Red Robin
AT&T	Freddy's Frozen Custard & Steakburgers	Kay Jewelers	Ross
AutoZone	GameStop	Mac Cosmetics	Smart & Final
Big Lots	General Motors Company	Macy's	T-Mobile
Carl's Jr.	H&M	Mazda Motor Corporation	Target
Chevrolet	Harley Davidson	McDonald's	Toyota Industries
CVS Pharmacy	Holiday Inn Express	Nissan Motor Company	Toys R Us
Denny's	Hollister	Nordstrom Rack	Victoria's Secret
Discount Tire	Honda Motor Company	Office Depot	Volkswagen Group
El Super	Hyundai Motor Company	Old Navy	Walgreens
Express	IHOP	Outback Steakhouse	Walmart
Fiat Chrysler Automobiles	In N Out Burgers	Panda Express	Zales

ECONOMIC INDICATORS

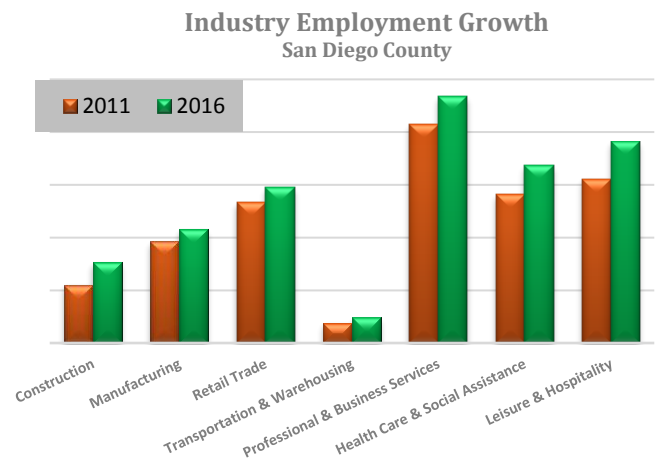
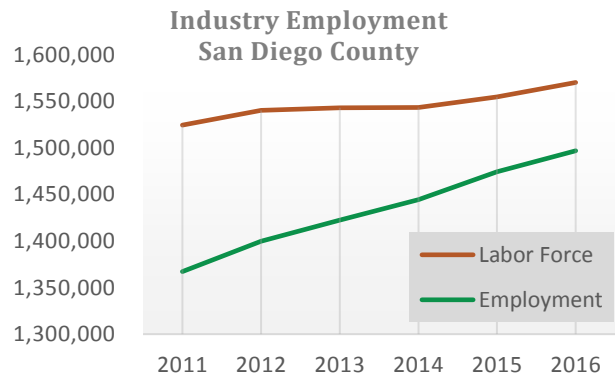
EMPLOYMENT SUMMARY

San Diego County is the third largest county in California by labor force and employment size. During the period between 2011 and 2016 the San Diego labor force expanded by 3%, while total employed grew by 9.5%, adding nearly 130,000 new employees and decreasing the unemployment rate to 4.7%.

The majority of the new employees were in Service Producing sectors, which accounted for 82% of the growth. The largest concentration of added positions was in the Leisure & Hospitality Group where Accommodations & Food Services created over 30,300 jobs showing growth of 23%. Other areas showing strong growth include Health Care & Social Assistance, Retail Trade, Professional & Business Services, and Transportation & Warehousing.

The Goods Producing sectors also showed solid growth above California averages. The most notable category being Construction, which added 20,900 jobs representing growth of 38%.

National City employment growth was comparable to San Diego County where it grew at 9.5%, resulting in 2,000 new employees between 2011 – 2016. As total employment continued to grow at a faster rate than the labor force the unemployment rate decreased down to 6% in 2016.



Source: Employment Development Department (Dec. 2017)

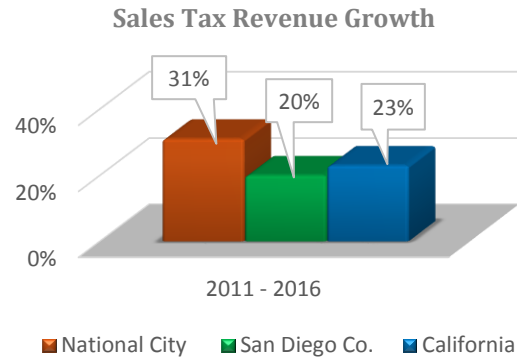


SALES TAX SUMMARY

National City sales tax revenues grew a strong 31% over the period between 2011 and 2016 calendar years, representing over \$3.6 million of increased revenue. In comparison San Diego County and California sales tax revenues grew 20% and 23% respectively.



Source: HdL Companies (Sept. 2017)

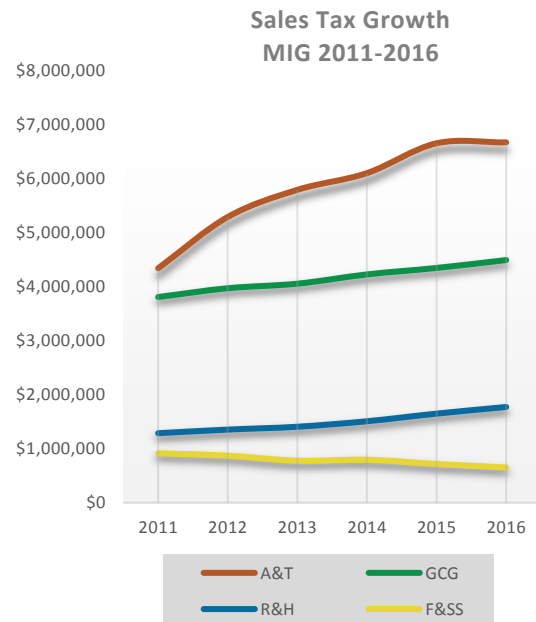


The Autos & Transportation (A&T) group makes up a significant influence on the National City economy shown by its influence on revenues. The A&T group represents 43% of all sales tax revenues and the sector grew by 54% during the comparison period, accounting for 63% of all growth. The Auto Industry has been positively trending statewide growing 57%. Removing the growth from the Auto & Transportation group, National City sales tax revenue grew by just 11%.

The General Consumer Goods (GCG) sector, which includes the majority of traditional retail concepts, had growth of 18% which is above the statewide average. Department Stores, Discount Department Stores, Electronics/Appliance Stores, Family Apparel Stores, and Specialty Stores all account for 10% or more of the GCG sectors total growth. The above-mentioned business types combine to represent 73% of GCG's growth during the five-year period. National City retailers benefited from consumer trends benefitting off-price & small format apparel concepts, an expanding beauty & cosmetics industry, and increased sales of mobile devices & accessories.

The Restaurants & Hotels (R&H) groups growth was dominated by restaurants as the sector showed growth of 38%. Revenue from the Restaurants & Hotels groups is the third largest sector for National City where it was 11% of the City's sales tax revenue in 2016. All restaurant categories performed well, but new openings in the Fast-Casual business type led the category to the largest percentage growth during the five-year period with growth of over 109%.

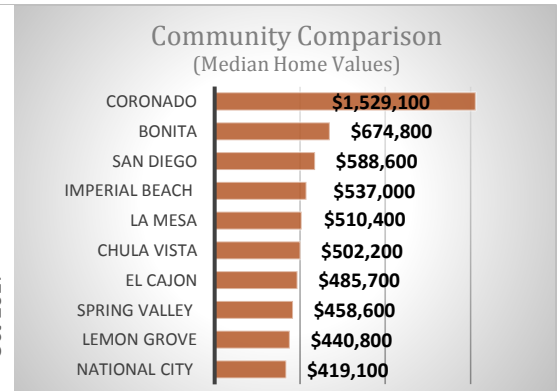
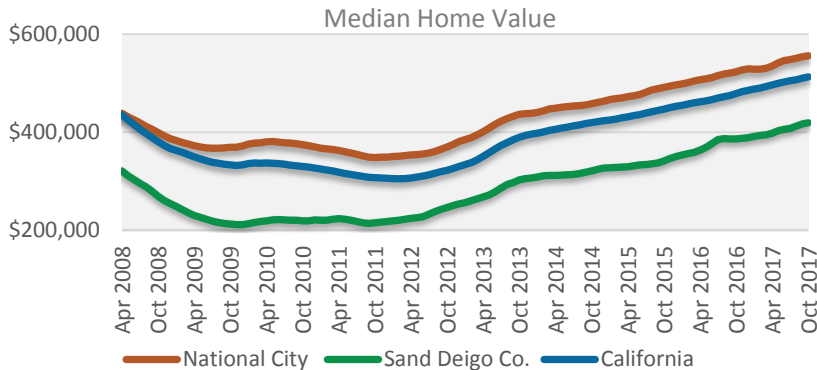
Sectors that experienced low or negative growth included Fuel & Service Stations (F&SS) and Business & Industry (B&I). Fuel & Service Stations 29% decline in revenue was consistent with regional and statewide performance resulting from lower fuel prices. Business & Industry saw good growth in most business types but totals were offset by business consolidations and reporting aberrations that inflated the results in 2011.



HOUSING MARKET STATISTICS

Home values in National City continue to grow as the Median Home Value is \$419,100 representing an increase of 8.5% over the prior year and is projected to increase by 4% over the next year.

- Owners vs. Renters 35% / 65%
- High vs. Low home values during the last decade
 - ✓ High: October 2017 \$419,100
 - ✓ Low: December 2009 \$211,300

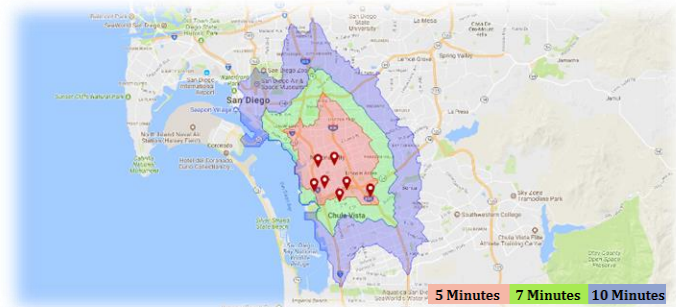


Source: Zillow (Sept 2017)

TRADE AREA

CONSUMER DEMAND

Per a Consumer Demand & Market Supply Assessment, combined with a sales tax leakage report, National City offers opportunities in the following retail categories. It's important to keep in mind many of these concepts may be a better fit in specific areas or shopping centers throughout the city.



- Electronics/Appliance Stores
- Full-Service Restaurants
- Furniture Stores
- Grocery/Markets
- Women's Apparel

CONTACT

For more information on the National City marketplace, contact **Megan Gamwell** at **(619) 336-4200**.

Sources: Demographic Data and Market-Business Information was formulated from several sources including CA Department of Finance, City of National City, Employment Development Department, HdL, Personix, PopStats, United States Census Bureau, X-Span Results, Inc., and Zillow.