Revitalization plan for Del Mar Village

Prepared for the Del Mar Village Association

The Community Land Use and Economics Group, LLC
Arlington, Virginia
2007

Contents

Tables

Introduction

Del Mar possesses extraordinary assets. It borders a thriving metropolitan area, with several million potential customers within easy reach. Its main street is one of the nation's most celebrated historic highways, bringing the community a steady flow of visitors. It is home to a legendary race track. Its residents are highly engaged, with civic leaders who have worked diligently for decades to protect the community's scenic vistas and small-town character. And it possesses one of the most beautiful beaches in the United States, edged by a green buffer that shields the coast and the community from encroaching sprawl.

Del Mar Village – Del Mar's downtown district – is home to an eclectic mix of more than 250 businesses, ranging from insurance agencies to a luxury resort and spa. Its small-scale architecture, proximity to the beach and relaxed attitude are popular with both residents and visitors.

But, in spite of its many advantages, Del Mar Village suffers from some of the challenges with which many other older and traditional town centers throughout the United States (and, increasingly, around the world) suffer – particularly problems with parking (management, supply, perception), retail development focus, marketing image, and coordination of development activities. It also suffers from a few relatively unique challenges, some of which appear to be the inadvertent byproducts of goals that are central to the district's character. For example, the district's ocean viewsheds are key components of its strong, positive visual characteristics – but preserving the viewsheds limits the district's density and, in turn, its ability to generate enough municipal revenue to cover the costs of services and public improvements. The community's streetscape plan provides for upgrades that will eventually make its streets and sidewalks safe and more attractive – but, by assigning much of the burden of funding and implementing the streetscape plan to private-sector property owners and developers, construction has happened in isolated spurts, rather than as a catalyzing initiative. The community enacted Measure B, putting the design of any projects over properties over 11,250 square feet in size up for a public vote, giving residents an almost unprecedented level of input and control into the design of new projects – but, somewhat ironically, stifling development by adding time and predevelopment costs. The district's visitor-serving hotels generate Transient Occupancy Tax revenue – particularly crucial since Proposition 13's passage dramatically curbed the rate of growth of property tax revenues – but opinion is mixed about whether the district's retail development planning should focus more on meeting the needs of visitors or community residents, or if both markets might coexist.

Conflicts like these between community development goals and their often unanticipated byproducts, between areas of market focus, and between competing development priorities are common in the evolution of downtowns and downtown revitalization/management initiatives. In part, these conflicts have been triggered by profound changes in retailing, transportation, and urban land use that have taken place over the past half century, and these underlying changes often continue to exacerbate downtown revitalization and development challenges. For example, older downtowns do not usually conform neatly to land use laws created in the second half of the 20th century in response to suburban development patterns, creating a web of zoning and other code conflicts to untangle. Downtown retail market catchment areas that were historically focused on local residents (primarily because of transportation constraints) have been gradually eroded by the expansion of the Interstate highway system and the parallel growth of the auto industry, intensifying pressure on transportation infrastructure in older downtowns designed primarily for pedestrians, not cars. Suburban development, accelerated depreciation, and changes in retail distribution stimulated the growth of the shopping mall industry, then discount superstores, undercutting sales for independently owned businesses but also opening new opportunities for retail growth.

One of the primary challenges of downtown economic development is therefore to actively guide retail market development, both by determining an optimum retail market direction and also by aligning existing tools and creating new tools to guide market direction. In February 2007 the Del Mar Village Association contracted with the Community Land Use and Economics Group to provide the Association with an objective assessment of the district's retail performance, information about the district's retail development opportunities and constraints, and a suggested strategy for guiding retail market development in the next few years. This report summarizes our research and primary recommendations.

Project components

Our work involved several major components:

- We reviewed two dozen plans and reports prepared for the City of Del Mar or for other interested entities over the past 30 years.

- We examined demographic and retail sales information for Del Mar and the region.

- We conducted an intercept survey in Del Mar Village, asking a randomly selected sample of people in Del Mar Village during one week in April to share information with us about the purpose of their visit, their demographic characteristics, their impressions of the district, and their ideas for making the district a better place.

- We conducted a web-based survey of Del Mar Village businesses.

- We estimated the retail buying power of Del Mar residents and of residents of the region and compared these amounts with the volume of retail sales the City is actually capturing.

- We conducted confidential interviews with ten people, including city officials, business owners, property owners, Del Mar residents, and residents of nearby communities, asking for their insights into Del Mar Village's strengths, weaknesses, opportunities and challenges.

- We synthesized the information we had gathered and outlined a set of business development and tactical recommendations for strengthening Del Mar Village's retail base. With feedback from the Del Mar Village Association, we will then provide greater detail on implementing the recommendations the Association wishes to pursue.

Limitations

As is true of all demographic, economic and market studies, our analysis's reliability is limited to the reliability and quality of the data available. Our research assumes that all data made available by federal, state, county, and city sources is accurate and reliable. For Del Mar, there are several specific limitations worth mentioning:

First, because our analysis has been conducted in the middle of the decade, between the 2000 and 2010 US Censuses, population data is not quite as current as it would be if this analysis were conducted early in the decade, when population data is new. We have relied on mid-Census projections by SANDAG, the

California Department of Finance, ESRI, the US Census Bureau, and our own estimates of population and retail sales changes in the areas included in this analysis.

Second, the retail market catchment areas of shopping districts (such as Del Mar Village) are not confined to the boundaries of political jurisdictions (such as the City of Del Mar or San Diego County). We have therefore had to make estimates based on reasonable assumptions about the market catchment area of various commercial centers in Del Mar and vicinity. In general, our estimates tend to be somewhat conservative.

Third, it appears that big-box superstores in many parts of California do not always report their taxable sales wholly under the "general merchandise stores" category (NAICS[1] 452) but, instead, sometimes obtain separate business licenses for some of the departments within the store, reporting sales in these NAICS categories. This complicates the process of estimating total taxable sales in these stores in the Del Mar region. Again, we have made estimates based on reasonable assumptions, drawing on our observations of the sale performance of comparable stores in similar markets outside California.

Given these limitations, our report reflects what we believe are reasonable estimates of historic trends, current conditions, and future possibilities.

[1] North American Industry Classification System

Retail market overview

We began by examining some general indicators of economic activity in Del Mar and nearby communities – population and household characteristics, retail sales estimates, and estimates of retail buying power and retail sales voids, in particular.

Anticipated population growth: Del Mar's population is expected to grow quite modestly between now and 2020 – only about three percent between 2005-2020, about one-third the anticipated growth rate of San Diego County, California, and the nation as a whole.

Community	2000	2005	% ch	2010	% ch	2020	% ch
USA	281,421,906	295,507,134	5%	308,935,581	10%	335,804,546	9%
California	33,871,648	36,038,859	6%	38,067,134	12%	42,206,743	11%
San Diego Co.	2,813,833	3,051,280	8%	3,211,721	14%	3,528,605	10%
Carlsbad	77,998	95,146	22%	107,305	38%	120,631	12%
Del Mar	4,389	4,543	4%	4,564	4%	4,680	3%
Encinitas	58,195	62,774	8%	64,904	12%	68,372	5%
Escondido	133,528	141,350	6%	144,657	8%	153,395	6%
Oceanside	160,905	174,925	9%	188,974	17%	201,526	7%
San Marcos	55,160	73,054	32%	77,645	41%	82,448	6%
Solana Beach	12,887	13,400	4%	13,450	4%	13,568	1%
Vista	90,131	94,109	4%	97,612	8%	104,578	7%

Table 1: Projected population growth for Del Mar and reference communities, 2000-2020 (*Sources: 2000 Census of Population;* SANDAG; California Dept. of Finance; CLUE Group)

Householder age and household size: Del Mar and Solana Beach have more households headed by people between 55-64 years of age than other nearby communities and the County as a whole, but fewer households headed by people between 35-44 and over 75. They also have the highest percentages of one- and two-person households among nearby communities. Both of these characteristics have potential implications for retail development, suggesting (for example) less demand for "starter home" furnishings and more demand for upscale furnishings, greater demand for upscale and intimate-dining restaurants than for family restaurants, and less demand for children's clothing than in nearby communities.

	Del Mar	Carlsbad	Encinitas	Solana Beach	San Diego County
Age of householder					
Under 25	3%	2%	3%	3%	6%
25-34	16%	15%	17%	16%	19%
35-44	20%	24%	26%	17%	25%
45-54	20%	24%	27%	23%	20%
55-64	20%	12%	12%	15%	12%
65-74	15%	11%	8%	13%	10%
75 and over	7%	10%	8%	13%	10%
Household size					
1 person	36%	25%	26%	32%	24%
2 people	42%	38%	36%	39%	32%
3 people	12%	16%	16%	12%	16%
4 people	7%	14%	14%	10%	14%
5+ people	3%	8%	8%	7%	14%

Table 2: Age of householder and household size for Del Mar and reference communities (*Sources: 2000 Census of Population*)

***Per capita* and household income:** Del Mar's *per capita* income is significantly higher than that of neighboring communities (including Solana Beach) and the County, and Del Mar and Solana Beach have significantly higher percentages of households with annual incomes of $150,000 or more than nearby communities or the County as a whole (Table 3).

	Del Mar	Carlsbad	Encinitas	Solana Beach	San Diego County
***Per capita* income**					
Per capita income	$64,615	42,528	37,038	50,480	24,861
Household income					
Under $20,000	15%	11%	12%	13%	18%
$20,000 - $50,000	18%	26%	26%	22%	34%
$50,000 - $100,000	30%	34%	33%	28%	32%
$100,000 - $150,000	15%	16%	16%	16%	10%
$150,000 and over	22%	12%	13%	21%	6%

Table 3: *Per capita* and household income for Del Mar and reference communities (*Sources: 2000 Census of Population*)

Workplace: A high percentage of Del Mar residents work outside Del Mar – 81 percent, compared with only 51 percent for the overall County (Table 4). This amplifies the opportunity for Del Mar residents to shop outside Del Mar for a wide range of products and services. Del Mar also has one of the highest percentages in the region of residents who work at home in the County – 11 percent, versus the County average of four percent. So, of the 19 percent of employed Del Mar residents who work in Del Mar, more than half work at home – an unusually high percentage. Carlsbad, Encinitas, and Solana Beach also have relatively high percentages of residents who work at home (Table 5). Both of these patterns suggest the possibility of market demand for small office spaces, coworking[2] and other shared office spaces, and support services for small offices (accounting, research, mailing, etc.).

Sources of household income: The percentage of households in Del Mar with income from interest, dividends or net rental income is the highest in San Diego County and significantly higher than that of the state or nation. In addition, the percentage of households in Del Mar with self-employment income is among the highest in the County and is twice that of the nation, underscoring the likelihood that any unmet retail market demand will be at higher price-points (Table 6).

[2] See, for example, "Where the Coffee Shop Meets the Cubicle", in the February 26, 2007 online edition of *Business Week* and "Co-working: the ultimate in teleworking flexibility", in the October 23, 2007 online edition of *Network World.*

Place	Worked in place of residence	Worked outside place of residence
San Diego County	49%	51%
Carlsbad	33%	67%
Del Mar	19%	81%
Encinitas	27%	73%
Escondido	35%	65%
Oceanside	27%	73%
San Marcos	26%	74%
Solana Beach	24%	76%
Vista	26%	74%

Table 4: Percentages of Del Mar and area residents who work in or outside their places of residence (*Sources: 2000 Census of Population;* SANDAG; California Dept. of Finance)

Place	Worked at home	Do not work at home
San Diego County	4%	96%
Carlsbad	8%	92%
Del Mar	11%	89%
Encinitas	8%	92%
Escondido	3%	97%
Oceanside	4%	96%
San Marcos	4%	96%
Solana Beach	9%	91%
Vista	3%	97%

Table 5: Percentages of Del Mar and area residents who work/do not work at home (*Sources: 2000 Census of Population;* SANDAG; California Dept. of Finance)

Source of income	Del Mar	Carlsbad	Encinitas	Poway	Solana Beach	San Diego County	California	United States
Wage or salary income	72%	76%	80%	72%	85%	79%	79%	78%
Self-employment income	24%	20%	24%	24%	18%	14%	14%	12%
Interest, dividends or net rental income	61%	48%	50%	57%	51%	37%	35%	36%
Social Security income	22%	24%	18%	28%	19%	23%	22%	26%
Supplemental Security income	1%	2%	1%	2%	3%	4%	5%	4%
Public assistance income	0%	1%	1%	0%	2%	4%	5%	3%
Retirement income	17%	17%	14%	19%	19%	18%	15%	17%
Other sources of income	5%	13%	12%	12%	14%	14%	13%	13%

Table 6: Percentages of households with income from wages/salaries, self-employment, and other sources (*Source: 2000 Census of Population)*.

Housing tenure: Approximately 56 percent of Del Mar residents live in owner-occupied housing (Table 7), close to the County's average (55 percent) but slightly lower than nearby communities like Encinitas (64 percent) and Solana Beach (62 percent).

Place	Owner-occupied	Renter-occupied
San Diego County	55%	45%
Carlsbad	67%	33%
Del Mar	56%	44%
Encinitas	64%	36%
Escondido	53%	47%
Oceanside	62%	38%
San Marcos	66%	34%
Solana Beach	62%	38%

Table 7: Percentages of residents of Del Mar and vicinity who live in owner-occupied and renter-occupied housing (*Sources: 2000 Census of Population;* SANDAG; California Dept. of Finance)

Business mix: We identified 259 businesses[3] in Del Mar Village and categorized them by primary activity. We found that the five largest uses are retailing (25.5 percent of the district's businesses), personal services (13.1 percent), eating/drinking places (10.4 percent), medical/dental services (9.7 percent), and professional services (9.3 percent). These five uses comprise approximately two-thirds of the district's commercial uses (Table 8).

Category	Number	Percent
Administrative + support services	10	3.9%
Consulting	10	3.9%
Counseling	12	4.6%
Developer, contractor, construction	6	2.3%
Eating + drinking place	27	10.4%
Financial services	11	4.2%
Health spa, fitness	3	1.2%
Hotel, motel	8	3.1%
Laundry, dry cleaning	3	1.2%
Manufacturing	2	0.8%
Medical, dental	25	9.7%
Nonprofit organization	4	1.5%
Parking	2	0.8%
Personal services (hair, nail, massage, etc.)	34	13.1%
Postal	1	0.4%
Publishing	1	0.4%
Professional services (accounting, law, etc.)	24	9.3%
Retail	66	25.5%
Veterinarian, animal care	1	0.4%
Miscellaneous + undefined	9	1.9%

Table 8: Current business mix in Del Mar Village

[3] We identified 285 businesses in Del Mar Village altogether but omitted 26 of them from our business mix analysis that appear to be family foundations, managed funds, and other entities without employees or not accessible to the public.

Business mix in older districts is highly reliant on specific local market opportunities, and there are therefore no national benchmarks against which to measure a district's combination of commercial uses. However, from our experience with communities similar in size, demographic composition, seasonal visitor traffic, and economic base, Del Mar's business mix appears to have a slightly lower percentage of retail businesses than we would ordinarily expect (30-35 percent is a more typical average), slightly more personal services businesses (6-8 percent is more typical), and slightly more medical offices (6-8 percent).

Retail sales performance: Because actual data on retail sales are confidential, estimates of retail sales vary considerably from source to source. In estimating Del Mar's retail sales levels, we have examined data from five primary sources: the US Census Bureau's *Economic Census* (which includes 18 industry censuses, such as the *Census of Retail Trade* and the *Census of Arts, Entertainment, and Recreation*); ESRI; SANDAG; the California Department of Finance; and a survey of Del Mar Village businesses. Among our findings:

- The US Census Bureau's *Census of Retail Trade,* conducted every five years as part of the Bureau's Economic Census, reports the aggregate gross sales, numbers of employees, and other data for retail businesses with paid employees (thus excluding "nonemployers", including self-employed people and partnerships who do not pay themselves salaries). According to the 2002 *Census of Retail Trade*, the 45 retail businesses in Del Mar included in the Census[4] reported total sales of $28.8 million in 2002, down from $29.9 million in 1997 (representing an inflation-adjusted decrease of 10.4 percent).

- According to the Census Bureau's *Census of Accommodation and Food Services*, Del Mar restaurants reported $57,697,000 in gross revenues for 2002, up from $42,024,000 in 1997 (representing an inflation-adjusted increase of 27.4 percent.

- ESRI, a private data company, estimates that total retail sales in Del Mar in 2006 were $30.9 million (NAICS category 44-45), with an additional $101.6 million in food and drink sales (NAICS category

[4] Only businesses with employees are included in the *Census of Retail Trade* – so, businesses with no employees are excluded from the *Census.* The businesses excluded are primarily sole proprietorships and partnerships whose owners/partners receive distributions rather than salaries) and therefore tend to be independently owned retail businesses, rather than chain retailers. Given the relatively high concentration of independently owned businesses in Del Mar Village, it is likely that some of the district's retail businesses are not included in the *Census.*

722). ESRI's estimates, which are based on an amalgam of *Census of Retail Trade*, Census Bureau nonemployer statistics[5], and other data, suggest sluggish retail growth (0.9 percent since 2002, adjusted for inflation) but strong growth in food and drink sales (65.9 percent, adjusted for inflation).

	Del Mar		San Diego County		Change, 1997-2002	
NAICS category	1997	2002	1997	2002	Del Mar	County
Retail trade	54	45	9,109	9,486	-17%	4%
Motor vehicle + parts dealers	1	1	926	1,011	-	9%
Furniture + home furnishings stores	2	2	552	615	-	11%
Electronics + appliance stores	1	1	477	530	-	11%
Bldg. material + garden equip. dealers	2	1	503	539	-50%	7%
Food + beverage stores	4	3	1,213	1,285	-25%	6%
Health + personal care stores	4	1	685	706	-75%	3%
Gasoline stations	1	1	684	660	-	-4%
Clothing + accessories stores	16	14	1,521	1,553	-13%	2%
Sporting goods, hobby, books, music	4	4	733	661	-	-10%
General merchandise stores	0	0	194	204	-	5%
Miscellaneous store retailers	18	14	1,254	1,222	-22%	-3%
Nonstore retailers	1	3	367	500	-200%	36%
Accommodation + food services						
Accommodation	7	6	534	546	-14%	2%
Food services + drinking places	34	34	4,907	5,215	-	6%

Table 9: Numbers of establishments with employees in Del Mar and in San Diego County (*Sources: 1997 and 2002 Economic Census*)

- Del Mar's retail sales (excluding food and drink sales) represented 0.13 percent of San Diego County's retail sales in 1997; by 2002, this had dropped to 0.09 percent. Del Mar's food and drink sales remained a consistent 1.49 percent of County food and drink sales.

[5] Retail "nonemployers" (see note 4, above) generate a relatively small percentage of overall retail sales but represent 55 percent of all retailers in the United States.

- During the late summer of 2007 we conducted a survey of Del Mar Village businesses. Twenty-nine businesses agreed to participate in the survey – slightly more than 10 percent of all district businesses. Of these 29 businesses, the retailers reported an average of $289,000 in gross sales for their major product lines (gross sales reported from secondary product lines were negligible). From our assessment of the district's retailers, though, we believe the survey's retail respondents are among Del Mar Village's most successful retailers and that gross and per-square-foot sales for most of the district's other retailers are significantly below these averages.

	Del Mar		San Diego County		Del Mar as % of County	
Category	1997	2002	1997	2002	1997	2002
Retail trade	29,883,000	28,841,000	22,215,341,000	31,586,056,000	0.13%	0.09%
Food services + drinking places	42,024,000	57,697,000	2,812,365,000	3,871,886,000	1.49%	1.49%
Total	71,907,000	86,538,000	25,027,706,000	35,457,942,000	0.29%	0.24%
Adjusted to 2002 dollars:						
Retail trade	32,591,000	28,841,000	24,228,419,000	31,586,056,000	0.13%	0.09%
Food services + drinking places	45,832,000	57,697,000	3,067,212,000	3,871,886,000	1.49%	1.49%
Total	78,422,965	86,538,000	27,295,631,000	35,457,942,000	0.29%	0.24%

Table 10: Sales in establishments with employees in Del Mar and in San Diego County (*Sources: 1997 and 2002 Economic Census*)

- The City of Del Mar received roughly $1.7 million in retail sales tax revenue in 2006 (Table 11), and it estimates that 17 percent of the retail sales taxes it collects come from businesses in the Central Commercial zone[6], or roughly $289,000 of its retail sales tax revenue. With one percent of retail sales accruing to the City as sales tax revenue, this means that the Central Commercial zone generated approximately $28,900,000 in taxable retail sales in 2006. Forty-six percent of the City's retail sales tax revenue is generated by restaurants; if this percentage is consistent within Del Mar Village, then the district's restaurants captured approximately $13.3 million in taxable sales and its non-restaurant retail businesses captured approximately $15.6 million in taxable sales. For non-restaurant

[6] The Central Commercial zone which the 63 parcels along Camino del Mar between 9th and 15th streets, plus much of 15th Street, but not including L'Auberge del Mar and Del Mar Plaza.

businesses, this means that average gross sales per business in the Central Commercial zone were approximately $260,000 in 2006.

	Sales Tax	Transient Occupancy Tax
Actual 2004-05	$1,496,119	1,488,935
Actual 2005-06	1,602,194	1,564,641
Amended 2006-07	1,699,400	1,661,300
Projected 2007-08	1,682,000	1,733,000
Projected 2008-09	1,766,000	1,794,000

Table 11: Sales and Transient Occupancy Tax revenues, 2004-2009 (*Source:* City of Del Mar*, 2007-08 Adopted Budget*)

- Sales in the 45 Del Mar retail businesses included in the 2002 *Census of Retail Trade* averaged $641,000 per business, by far the lowest average in the region and significantly below the County, state and national averages (Table 12).

City	Total sales	# stores	Sales/store
United States	$ 3,056,421,997,000	1,114,637	$ 2,742,078
California	359,120,365,000	108,941	3,296,467
San Diego County	31,586,056,000	9,486	3,329,755
Carlsbad	2,019,554,000	411	4,914,000
Del Mar	28,841,000	45	641,000
Encinitas	973,601,000	276	3,528,000
Escondido	2,261,183,000	586	3,859,000
Oceanside	1,166,531,000	375	3,111,000
San Marcos	725,240,000	217	3,342,000
Solana Beach	179,208,000	94	1,906,000
Vista	889,907,000	247	3,603,000

Table 12: Average sales per retail store (not including restaurants/food service) in Del Mar and nearby communities (*Sources: Census of Retail Trade 2002*; ESRI; California Department of Finance; CLUE Group)

- Although average sales per business are relatively weak, sales per capita are relatively strong, with the 45 retail businesses and 34 restaurants included in the 2002 *Census of Retail Trade* realizing sales per capita of $19,049 that year – versus $11,621 for the County, $11,112 for the state, and $11,431 for the nation (Table 13). This reflects both Del Mar's small population size and also the large number of tourists and other visitors it receives. The economic impact of tourists is even more apparent when looking at average sales in the 34 restaurants included in the 2002 *Census of Accommodation and Food Services*: $1.679 million per restaurant, more than twice the county, state and national averages and higher than that of any other community in the northern part of San Diego County (Table 14).

Place	Total sales	Population	Sales per capita
United States	$ 3,377,822,505,000	295,507,134	$ 11,431
California	400,475,553,000	36,038,859	11,112
San Diego County	35,457,942,000	3,051,280	11,621
Carlsbad	2,161,517,000	95,146	22,718
Del Mar	86,538,000	4,543	19,049
Encinitas	1,091,946,000	62,774	17,395
Escondido	2,398,073,000	141,350	16,965
Oceanside	1,321,621,000	174,925	7,555
San Marcos	800,974,000	73,054	10,964
Solana Beach	222,609,000	13,400	16,613

Table 13: Total retail sales (including restaurants/food service) *per capita* in Del Mar and nearby communities (*Sources: 2002 Census of Retail Trade* and *Census of Accommodation and Food Services; 2000 Census of Population;* California Dept. of Finance [pop. estimates]; CLUE Group [sales per capita])

Sales void analysis and retail market demand: Sales void analyses measure the difference between sales demand (the amount of money people in a given area are likely to spend on various retail goods and services, based on their demographic and lifestyle characteristics) and the volume of retail sales that businesses in the area are actually capturing. People shop in many places – stores close to home and work, businesses they visit in nearby communities or while away on vacation, from catalogs, online, etc. –

so the amount of market demand that exists in a given area very rarely matches the retail sales businesses in the area achieve. The difference between sales potential and actual sales might be positive (generally meaning that the area is attracting outside shoppers) or negative (generally meaning that area is losing local shoppers).

In some instances, a sales leakage suggests that there is unmet demand in the community for the product or service being measured and that the community can therefore probably support additional square footage of that type of business (either in one or more existing businesses or, if there is enough demand, in one or more new businesses). But, in many instances a sales leakage does not necessarily mean that such an opportunity exists. For example, there could be a strong competitor in a nearby community that is so popular that a new business would have difficulty competing. There could be a cultural reason why local customers might not be likely to buy certain products or services, even though it might appear that they have they buying power to do so. People who work outside the community might find it easier to shop for certain things near their workplaces rather than in their home communities. There are many other reasons why the presence of a sales leakage might not necessarily translate into a business opportunity for the district.

City	Total sales	# stores	Sales/store
United States	$ 321,400,508,000	504,641	$ 636,889
California	41,355,188,000	60,079	688,347
San Diego County	3,871,886,000	5,215	742,452
Carlsbad	141,963,000	162	876,000
Del Mar	57,697,000	34	1,697,000
Encinitas	118,345,000	159	744,000
Escondido	136,890,000	214	640,000
Oceanside	155,090,000	226	686,000
San Marcos	75,734,000	104	728,000
Solana Beach	43,401,000	42	1,033,000

Table 14: Average sales per restaurant/food service establishment in Del Mar and nearby communities (*Sources: 2002 Census of Accommodation and Food Services;* ESRI; California Department of Finance; CLUE Group)

Similarly, a sales *surplus* in a particular category does not necessarily mean that a district *cannot* support additional businesses of that type. Many districts have become successful by building a strong cluster of home furnishings stores, restaurants, art galleries, or other specialties that attract shoppers from a broad geographic area, generating sales that exceed the buying power of local residents. Having established regional dominance in a niche, they are often able to attract even more customers from that region and therefore to support additional businesses within those categories or related categories.

Sales void analysis is initially a measurement of the extent to which a community's own residents are making retail purchases locally (versus leaving the community to shop, or shopping online or via catalog). But it is also a useful tool for understanding the buying power of people of different demographic groups and for identifying pockets of opportunity that might exist in order to better meet local retail needs or to capitalize on opportunities that might exist for a community other than those created by area residents – sales to tourists and visitors, for example, or to any other group for which demographic information is available.

This information can help businesses reposition themselves or market products and services more effectively, to add new product lines, and/or to launch new businesses. With online shopping growing almost exponentially over the past decade, the marketplace for many downtown businesses is shifting from local to global, making it possible for businesses that would have been dependent almost exclusively on purchases by community residents and visitors a decade or two ago to reach customers almost anywhere in the world. This means – among other things – that, with a good marketing plan and a solid understanding of ecommerce, highly specialized retail businesses can locate in historic downtown districts without necessarily needing to rely primarily on locally generated sales – and the methodology used in sales void analysis to estimate the buying power of specific groups of people can also help identify potential opportunities to sell specialized goods and services to large, geographically dispersed groups of customers.

We began by estimating sales voids in major retail categories in Del Mar. (Table 15).

Category	Actual sales[7]	Potential sales	Void
Groceries	2,616,000	8,946,000	(6,330,000)
Dining out	68,699,000	7,853,000	60,846,000
Alcoholic beverages	10,088,000	1,537,000	8,551,000
Housekeeping supplies	2,441,000	1,462,000	979,000
Household furnishings + equipment	4,452,000	6,010,000	(1,558,000)
Apparel + apparel-related services	15,266,000	6,131,000	9,135,000
Vehicle purchases	1,900,000	10,781,000	(8,881,000)
Gasoline and motor oil	308,000	4,324,000	(4,016,000)
Vehicle maintenance and repairs	234,000	1,945,000	(1,711,000)
Drugs (prescription + OTC)	223,000	1,147,000	(924,000)
Medical supplies	23,000	327,000	(304,000)
Entertainment	3,995,000	6,369,000	(2,374,000)
Personal care products + services	2,765,000	2,011,000	754,000
Reading materials	862,000	429,000	433,000
Tobacco, smoking products	366,000	593,000	(227,000)
Totals:	114,238,000	59,865,000	54,373,000

Table 15: Retail buying power of Del Mar residents vs. actual sales in Del Mar (*sources: 2002 Census of Retail Trade; 2002 Census of Accommodation and Food Services; 2002 Census of Information; 2002 Census of Arts, Entertainment, and Recreation; 2002 Census of Other Services: 2002 Census of Health Care and Social Assistance;* ESRI*; 2005 Consumer Expenditure Survey,* CLUE Group*).*

[7] *A note on methodology*: Sources of actual retail sales data report information on store sales, rather than information on sales of the specific product lines that consumers buy in these stores. There are many items, however, that a consumer might purchase from any of a number of different types of stores – for example, he or she might buy toothpaste at a pharmacy, grocery store, convenience store, dentist's office, or any of a number of other places. Only 56 percent of the sales that take place in US grocery stores, for example, are sales of groceries. We have therefore used detailed information on product line purchases at different types of stores from the 2002 *Economic Census*, adjusted for 2006 sales levels using trends from the Del Mar Office of Finance's taxable retail sales data, and have then calibrated these product line purchases with the product lines contained in the *Consumer Expenditure Survey*.

We found that Del Mar is experiencing significant sales leakages in four major categories:

- Groceries
- Vehicle purchases
- Gasoline and motor oil
- Entertainment

In addition, the City is experiencing relatively minor sales leakages in five other categories: household furnishings, vehicle maintenance/repairs, drugs/pharmaceuticals, medical supplies, and tobacco/smoking materials.

These leakages are more than offset by surpluses in other categories, however, particularly in those categories that typically appeal to visitors (such as dining out, alcoholic beverages, and personal care products and services). Some of the surpluses are quite substantial. Actual sales of food and drink exceed Del Mar resident demand by more than $60 million, for example – again, reflecting the enormous positive impact of visitors on Del Mar's economy.

It is very unlikely that the City can capture all of the sales leakage in these specific categories. Given the presence of well established clusters of car dealers in San Diego and Carlsbad, for example, it is unlikely that Del Mar would be able to make a significant dent in this market. Even if it were possible for the City to recapture as much as 50 percent of the remaining leakage (not including vehicle purchases), new sales revenues would total only $8,722,000 and retail sales tax revenues to the city would increase by only $87,220 – helpful in covering some of the costs of providing municipal services, infrastructure upgrades and other needed services for Del Mar Village, but not be enough to make a significant difference in completing implementation of the streetscape plan and covering other needed expenses.

We then estimated the retail buying power of people who work in Del Mar Village, people who live in the contiguous communities, and people who live in San Diego County (Table 16):

- We estimate that the households of Del Mar Village workers have approximately $5 million in annual retail buying power.

- Residents of nearby communities (Encinitas, Poway, Rancho Santa Fe, and Solana Beach) have household retail buying power of approximately $1.2 billion.

	Del Mar Village workers[8]	Del Mar	Nearby communities	San Diego County
Groceries	917,000	8,946,000	190,316,000	3,753,454,000
Dining out	610,000	7,853,000	160,264,000	2,823,306,000
Alcoholic beverages	113,000	1,537,000	30,792,000	533,485,000
Housekeeping supplies	116,000	1,462,000	29,517,000	679,583,000
Household furnishings + equipment	383,000	6,010,000	119,076,000	1,954,546,000
Apparel + apparel-related services	431,000	6,131,000	122,524,000	2,108,978,000
Vehicle purchases	892,000	10,781,000	223,566,000	4,003,978,000
Gasoline and motor oil	450,000	4,324,000	92,971,000	1,831,193,000
Vehicle maintenance and repairs	175,000	1,945,000	40,521,000	754,610,000
Drugs (prescription + OTC)	143,000	1,147,000	24,754,000	528,853,000
Medical supplies	31,000	327,000	6,883,000	130,116,000
Entertainment	477,000	6,369,000	128,960,000	2,246,983,000
Personal care products + services	170,000	2,011,000	41,602,000	762,538,000
Reading materials	34,000	429,000	8,719,000	154,687,000
Tobacco, smoking products	91,000	593,000	13,569,000	315,169,000
Totals:	5,033,000	59,865,000	1,234,034,000	22,581,479,000
Estimated actual sales:		114,238,000	1,700,000,000[9]	34,273,211,000

Table 16: Buying power of residents of Del Mar; nearby communities (Solana Beach, Rancho Santa Fe, Encinitas, and Poway); and San Diego County (including Del Mar) for a variety of products and services (*sources: 2002 Census of Retail Trade; 2002 Census of Accommodation and Food Services; 2002 Census of Information; 2002 Census of Arts, Entertainment, and Recreation; 2002 Census of Other Services: 2002 Census of Health Care and Social Assistance;* ESRI*; 2005 Consumer Expenditure Survey, The Dollars and Cents of Shopping Centers,* CLUE Group*).*

[8] We estimate that there are approximately 750 full-time-equivalent jobs in Del Mar Village (including owners who receive draws or distributions rather than being salaried employees), based on our survey of district business owners and on employment data from comparable communities. We have assumed that the majority of retail, food service and personal services jobs in Del Mar Village pay the minimum wage or slightly above and that professional services jobs pay salaries at or above Del Mar's median.

[9] Because Rancho Santa Fe is not an incorporated community, we were not able to obtain data on its actual retail sales. We have based our estimate of actual retail sales for the four nearby communities on data from Solana Beach, Encinitas, and Poway, to which we have added rough estimates of retail sales for Rancho Santa Fe based on its inventory of retail businesses and national retail sales averages, by type of business, for very wealthy communities.

- Residents of San Diego County have household buying power of approximately $22.6 billion (of which Del Mar's residents account for about $60 million).

The region as a whole appears to be generating significant retail sales surpluses, and much of this is directly attributable to the impact of tourists. The San Diego Convention and Visitors Bureau, for example, estimates that the County received about 28.4 million tourists in 2007 (of whom 41 percent are day visitors), and the Convention and Visitors Bureau estimates that tourists spent an average of $218.64 each, meaning that at least $6.2 billion of the $11.7 billion retail sales surplus that we estimate for the County is generated by tourists.

Visitors: We found a number of different estimates of the numbers of visitors Del Mar attracts each year.

- There appears to be agreement among most sources that approximately 600,000 people visit the Del Mar Racetrack between July and September, and the San Diego County Fair reported that the Fair attracted 1,266,000 people in 2007.

- Another 150,000 or so people attend trade shows, performances and other events at the Fairgrounds during the year.

- We estimate that, with approximately 400 hotel rooms, an estimated 1.8 people per room/night, and an estimated 70 percent occupancy rate, roughly 180,000 people stay in Del Mar hotels each year (not including other vacation rentals – condos, apartments, etc.).

- The 2000 parking study conducted by Meyer, Mohaddes Associates, Inc. for the City estimates that all 1,124 public and private North Beach parking spaces are used during the peak summer tourist season, but that Del Mar Village's 2,581 parking spaces are not as heavily used during peak periods. So, if we conservatively assume that there are 150 peak summer days, full occupancy of 1,124 parking spaces, 40 percent occupancy of 2,581 parking spaces, two people per car, and two parking space turns per day, at least 788,000 people visit Del Mar during the peak summer months.

There is almost certainly considerable overlap between these groups of visitors, so a precise estimate of the number of visitors Del Mar receives annually is impossible. However, the economic and fiscal impacts of visitor purchases on Del Mar and on Del Mar Village are obviously quite significant. One indicator: Del Mar leads San Diego County in *per capita* Transient Occupancy Tax revenue generation, with *per capita* tax revenues of approximately $384.49 in 2006, versus the County's overall *per capita* rate of approximately $63.72 (Table 17).

	FY 2007 TOT	Population	TOT per capita
Carlsbad	$ 10,504,353	92,928	$ 113.04
Chula Vista	2,492,190	212,756	11.71
Coronado	8,910,953	26,518	336.03
Del Mar	1,679,854	4,369	384.49
El Cajon	1,105,546	91,756	12.05
Encinitas	1,102,623	59,260	18.61
Escondido	1,318,644	133,510	9.88
Imperial Beach	292,411	26,137	11.19
La Mesa	914,629	53,043	17.24
Lemon Grove	31,525	23,869	1.32
National City	837,944	60,960	13.75
Oceanside	2,351,759	165,803	14.18
Poway	202,767	48,117	4.21
San Diego	150,417,640	1,256,951	119.67
San Marcos	363,885	76,501	4.76
Santee	128,811	52,530	2.45
Solana Beach	987,246	12,649	78.05
Vista	400,670	89,891	4.46
Unincorporated areas	3,387,032	453,906	7.46
Total collections	$ 187,430,481	2,941,454	$ 63.72

Table 17: FY2007 *per capita* Transient Occupancy Tax revenues in San Diego County (*sources:* SANDAG, California Dept. of Finance, *American Factfinder*)

If we were to conservatively estimate that Del Mar receives three million “visitor-days” annually (Table 18), then extrapolate[10] the number of households represented and their annual retail purchases, it appears likely that these visitors represent annual retail buying power of approximately $66.9 million (Table 19).

Event	Attendance estimate
Racetrack	600,000
San Diego County Fair	1,266,000
Other Fairgrounds events	150,000
Peak summer visitors	788,000
	2,804,000

Table 18: Illustrative estimate of 2007 Del Mar “visitor-days”

Thirteen percent of Del Mar Village users in April 2007 said that their primary reason for being in Del Mar Village was “I’m a visitor or on vacation”. Of these, 13.5 percent were from the San Diego area; 13.5 percent were from elsewhere on California (mostly in the Los Angeles area); and 73 percent were from outside the region (and from as far way as Ireland and Germany). We suspect that the percentage of visitors (versus local residents) in Del Mar Village grows significantly during the peak summer months (from 13 percent to perhaps 40 percent) and that, within this group, the percentage of visitors from the San Diego region also grows significantly (perhaps to as much as 25 percent).

[10] 3 million visitor-days ÷ 365 days/year ÷ 2.59 people/household (US average)

Category	
Groceries	$ 11,532,000
Dining out	8,219,000
Alcoholic beverages	1,689,000
Housekeeping supplies	1,922,000
Household furnishings + equipment	5,940,000
Apparel + apparel-related services	6,142,000
Vehicle purchases	12,627,000
Gasoline and motor oil	5,569,000
Vehicle maintenance and repairs	2,605,000
Drugs (prescription + OTC)	1,390,000
Medical supplies	415,000
Entertainment	5,473,000
Personal care products + services	2,178,000
Reading materials	478,000
Tobacco, smoking products	708,000
	$ 66,887,000

Table 19: Estimates of the annual retail buying power of the households represented by 3 million “visitor-days”

Intercept survey

"More stores, dining. But do not become like La Jolla!"
- Sorrento Valley resident

"You cannot govern with the idea of keeping people out yet on the other hand wanting their money."
- Del Mar Village resident

"Nothing stands out. I usually drive right by."
- Pacific Beach resident

"I think your organization benefits us residents and exhausts itself to do its very best."
- Del Mar Village resident

"I really like Del Mar Village. It's a great place to show visitors how beautiful California can be."
- Escondido resident

"It is charming, but I wish there were more shops."
- Carmel Valley resident

"It needs another inexpensive place to eat. A sandwich costs $10!"
- La Jolla resident

"It needs to become a place to walk down the hill to. Sidewalks, window shopping, place to gather, places to eat. User friendly!"
- Del Mar Village resident

We conducted an intercept survey in Del Mar Village in March 2007, using random sampling to select and survey 400 people in three locations along Camino del Mar (between 10th-11th Streets, at 13th Street, and at 15th Street) over the course of seven consecutive days and during three time slots on each of the seven days.

The survey instrument asked for information about the reason for each participant's current visit, her/his impressions of the district, shopping patterns, and demographic information. The survey instrument also included some open-ended questions to elicit information on survey respondents' impressions of the district, suggestions for new businesses or product lines, and suggestions for the district's improvement and future direction. By sampling a random sample of all people who visit Del Mar Village, the intercept survey provides a fairly reliable profile of all district users[11].

Survey census

- **Demographics:** Del Mar Village visitors are younger, slightly more likely to live in a three-person or larger household, and more affluent than the overall population of the City of Del Mar (Table 18).

- **Residence:** Nineteen percent live in Del Mar Village; 14 percent live elsewhere in Del Mar. Of the 66 percent who live outside del Mar, almost half live within a few miles of Del Mar (Carmel Valley, Encinitas, La Jolla, Solana, Beach, etc.).

- **Place of employment:** Fifteen percent work in Del Mar Village; 8 percent work elsewhere in Del Mar. Almost a third (29 percent) are retired, unemployed, in school, or a full-time caregiver or homemaker. Of the 48 percent who report that they work outside Del Mar, almost half work within a few miles (particularly in La Jolla, Sorrento Valley, and Carmel Valley).

- **Demographic differences in survey locations:** People who were intercepted and surveyed at the intersection of 15th and Camino del Mar were both more affluent *and* less affluent than those surveyed at the intersection of 13th and Camino del Mar or on Camino del Mar between 10th-11th Streets; this most likely reflects the greater presence at this intersection of both tourists and of lower-wage workers in restaurants and other retail businesses catering partly or wholly to visitors. Survey respondents intercepted at 15th and Camino del Mar are also slightly older than those intercepted at the other two survey locations (30 percent over 55 years of age, versus 21 and 20 percent, respectively, for 13th and Camino del Mar and for Camino del Mar between 10th-11th Streets).

[11] The survey has an error rate of plus-or-minus five percent and a confidence level of 95 percent.

Characteristic	Survey population	City of Del Mar
Age of householder		
Under 25	15%	3%
25-34	17%	16%
35-44	19%	20%
45-54	22%	20%
55-64	20%	20%
65-74	5%	15%
75 and over	2%	7%
Household size		
1 person	14%	36%
2 people	41%	42%
3 people	16%	12%
4 people	19%	7%
5+ people	10%	3%
Household income		
Under $20,000	7%	15%
$20,000 - $50,000	10%	19%
$50,000 - $70,000	5%	10%
$70,000 and above	78%	56%

Table 20: Del Mar Village intercept survey census, compared with City of Del Mar population census (*Sources:* CLUE Group, *2000 Census of Population*).

User profiles

The survey asked people to identify the *primary* purpose of their current visit to Del Mar Village.

- **Visitors/vacationers**: Thirteen percent of the people who visit Del Mar Village are on vacation in Del Mar or in the region. About 28 percent of Del Mar Village's tourist visitors come from within California (and, of those, about two-thirds come from southern California, within a two-hour drive of Del Mar). But most visitors come from farther away. Those who completed survey samples in Del Mar

Village included visitors from 18 US states[12] and other nations (Canada, Germany, Ireland). Three-quarters of the district's visitors report household incomes of $70,000 or above, and most are between 35-54 years old. Tourists give Del Mar Village high marks for the attractiveness of the streets, sidewalks and buildings, for parking availability, and traffic flow.

- **People who work in Del Mar Village**: Surprisingly few of the people who work in Del Mar Village (13 percent) also live in Del Mar Village. And a surprisingly high percentage (70 percent) of the district's workers live outside Del Mar. Slightly more than one-third (37 percent) of Del Mar Village's workers have household incomes less than $70,000, reflecting the relatively high number of district workers earning hourly wages. More than half of Del Mar Village workers are over 45 years of age. The opinions of Del Mar Village workers about the district's parking are among the poorest of all Del Mar Village visitors and users; they have positive opinions of its cleanliness, of the festivals and events it offers, and of merchant friendliness and product knowledge.

- **Dining out**: Twenty-three percent of the people who participated in the intercept survey said that their primary reason for visiting Del Mar Village on the day they were surveyed was to dine out, making this the largest group of survey respondents. Two-thirds live outside Del Mar, and roughly the same percentage have household incomes of $70,000 or more. They are overwhelmingly young: 52 percent are under 35 years of age, and an additional 21 percent are between 35-44. Roughly half (46 percent) live in one- and two-person households.

- **Coffee**: Slightly more than half (55 percent) of those who said their primary reason for visiting Del Mar Village on the day they were surveyed live in Del Mar, and all report having household incomes of $70,000 or more. They are mostly middle-aged; two-thirds are between 35-54, and another 22 percent are between 55-64. No one over the age of 65 reported that this was her/his primary reason for visiting Del Mar Village. This group has the most positive opinions of all surveyed of the district's safety, shopping hours, and merchant friendliness.

- **Shopping**: More than two-thirds of the survey participants who said that their primary reason for visiting Del Mar Village on the day they were surveyed was "shopping" are female. This stands in

[12] Arizona, Colorado, Connecticut, Florida, Idaho, Illinois, Iowa, Kansas, Kentucky, Massachusetts, Michigan, Minnesota, New Jersey, Nevada, Ohio, Pennsylvania, Rhode Island, Utah, and Virginia.

striking contrast to almost all other “primary purpose of this visit” categories, all of which had closer gender parity. Those whose visit was primarily for shopping are about evenly divided between Del Mar residents and residents of other communities, with slightly more than one-third saying they live in Del Mar Village itself. Two-thirds have household incomes of $70,000 or greater. The age distribution of this group is broader than that of other purpose-of-visit groups, with roughly 27 percent under 35 years of age, 36 percent between 35-54, and 37 percent over 54.

- **Browsing**: The demographic characteristics of Del Mar Village browsers are surprisingly different from those of shoppers. An overwhelming majority of browsers (83 percent) live outside Del Mar, and more than half (54 percent) are under 34 years of age. Unlike shoppers, most of whom are female, there is greater gender parity among browsers. Browsers’ impressions of the district are slightly more negative than those of the district’s overall visitor/user population.

- **Doing errands**: Surprisingly, slightly more than half (57 percent) of the survey respondents who said the primary reason for their visit on the day they were surveyed was “doing errands” live in Del Mar. Those who said that doing errands was the main reason for their visit on the day surveyed also tend to be older than those whose main reason for visiting is for another purpose; 65 percent are over 45, and 45 percent are over 55.

- **Visiting a professional office**: Those whose main reason for visiting on the day surveyed was to visit a professional office are all under 65 years of age, with one-third living in Del Mar Village one-third elsewhere in Del Mar, and one-third somewhere other than Del Mar. This group has the most positive impression of all purpose-of-visit groups of the variety of goods and services available in the district, but one of the most negative impressions of its parking availability and convenience and its traffic flow.

- **I live here**: Survey respondents who said the primary reason for visiting Del Mar Village on the day surveyed is because they live in Del mar Village has the most negative impression of the variety of goods and services available in the district, its attractiveness (buildings, streets and sidewalks), and its cleanliness. Sixty-one percent of this group is over 45 years of age, with approximately half having household incomes below $70,000 and half over $70,000. Roughly two-thirds of this purpose-of-visit group is male.

- **Walking/exercise**: Almost 60 percent of those who said their primary reason for visiting on the day of the survey was walking for exercise are female, and slightly more than half (54 percent) live in Del Mar Village. A very high percentage (85 percent) have household incomes over $70,000, and almost all (92 percent) are over 45 years of age. Twenty-five percent of those who reported that walking for exercise was their primary reason for being in the district on the day of the survey are 75 years of age or older; this is the primary reason for which people over 75 visit Del Mar Village.

- **Walking on the beach**: Survey respondents whose primary reason for visiting on the day of the survey was walking on the beach are primarily female (62 percent), and most (83 percent) live somewhere other than Del Mar. Slightly more than half (58 percent) have household incomes over $70,000, and most are either under 35 years of age (34 percent) or over 55 years of age (50 percent). This purpose-of-visit group has the poorest opinion of the district's parking availability and convenience, traffic flow, and appearance, but it has the highest opinion of merchant friendliness and product knowledge.

- **Walking the dog**: Although the intercept survey instrument did not offer "walking the dog" as an option, a handful of people noted that this was their primary reason for visiting Del Mar Village on the day they participated in the survey.

Shopping habits

The survey asked participants to tell us where they had *most recently* purchased each of 23 products and services:

- Groceries
- Banking
- Books
- Men's clothing
- Women's clothing
- Children's clothing
- Electronics (TVs, stereos, music)
- A gift for a friend or family
- Greeting cards
- Hair/nail/barber services

Product or service	Shopping area									
	Del Mar Village	Flower Hill	Albertson's shopping center	Von's shopping center	Del Mar Highlands	Cedros Design District	UTC	Online or from a catalog	I never buy this	Other place / not listed
Groceries	9%	1%	11%	15%	17%	0%	4%	0%	2%	41%
Banking	24%	1%	2%	1%	14%	1%	5%	3%	2%	46%
Books	9%	5%	0%	1%	23%	0%	4%	5%	3%	49%
Men's clothing	8%	1%	0%	0%	1%	1%	25%	4%	7%	53%
Women's clothing	7%	1%	0%	0%	1%	2%	24%	4%	10%	51%
Children's clothing	4%	1%	0%	1%	1%	1%	18%	3%	22%	49%
Electronics (TVs, stereos, music)	1%	1%	2%	0%	2%	0%	12%	11%	7%	64%
Gift for friend or family	15%	4%	0%	0%	3%	5%	16%	8%	1%	48%
Greeting cards	13%	3%	2%	6%	9%	2%	11%	1%	3%	50%
Hair/nail/barber services	14%	0%	1%	4%	7%	4%	5%	0%	4%	61%
Hardware	1%	0%	0%	3%	3%	1%	3%	1%	8%	80%
Home furnishings (art, decorative items)	6%	1%	1%	0%	0%	8%	7%	1%	7%	69%
Home furnishings (furniture, antiques)	3%	1%	0%	0%	0%	10%	6%	2%	8%	71%
Home furnishings (kitchen, bath)	1%	1%	1%	1%	3%	4%	8%	1%	7%	74%
Movie (in a movie theatre)	1%	24%	1%	1%	18%	0%	4%	0%	3%	47%
Pharmacy + personal care items	2%	3%	6%	18%	14%	1%	3%	1%	2%	51%
Recorded music	1%	1%	0%	0%	9%	0%	5%	17%	9%	57%
Dining out (everyday dining)	39%	4%	1%	1%	5%	0%	3%	0%	1%	46%
Dining out (fine dining)	41%	1%	0%	1%	1%	1%	2%	0%	1%	51%
Fast food	18%	2%	2%	3%	12%	0%	4%	0%	4%	54%
Sports equipment, clothing, supplies	2%	1%	1%	0%	1%	1%	8%	5%	6%	77%
Toys + games	2%	5%	0%	1%	4%	1%	7%	4%	15%	61%
Video rentals	2%	0%	2%	2%	16%	0%	2%	8%	12%	54%

Table 21: Where intercept survey participants most recently purchased various goods and services

- Hardware
- Home furnishings (art, decorative items)
- Home furnishings (furniture, antiques)
- Home furnishings (kitchen, bath)
- Movie (in a movie theatre)
- Pharmacy and personal care items
- Recorded music
- Dining out (everyday dining)
- Dining out (fine dining)
- Fast food
- Sports equipment, clothing, supplies
- Toys and games
- Video rental

This section of the survey provided us with invaluable information about where people of different demographic groups shop for things.

The overall results are not too surprising: Del Mar Village attracts the lion's share of restaurant visits; people go to Flower Hill for movies; the Von's shopping center and Del Mar Highlands serve as community shopping centers; UTC is popular for clothing, gifts, and greeting cards; the Cedros Design District for home furnishings; and websites and catalogs are popular choices for electronics and recorded music (Table 21).

Perceptions of Del Mar Village

We asked intercept survey respondents to evaluate 11 characteristics of Del Mar Village:

- Variety of goods and services
- Quality of goods and services
- Merchant helpfulness, product knowledge
- Attractiveness of the buildings
- Attractiveness of the streets and sidewalks
- Cleanliness

- Safety
- Festivals and events
- Parking availability and convenience
- Traffic flow
- Shopping hours

We asked survey participants to rate each characteristic as “excellent”, “good”, or “poor”. We then converted their responses to a three-point scale, with “excellent” equaling three points, “good” two points, and “poor” one point, making it possible to quickly evaluate average and individual ratings, with an average rating above 2.0 being generally positive and a rating below 2.0 being generally negative.

In general, survey respondents’ impressions of the district are quite positive, with most average ratings above 2.50 (out of a possible 3.0). Overall, survey respondents’ most positive impressions were of Del Mar Village’s safety (2.79 out of 3.0), cleanliness (2.73), and quality of goods and services (2.67). Their most negative impressions were of its parking availability and convenience (1.74), traffic flow (1.81), and variety of goods and services (2.19).

There are, however, some significant differences in the impressions of respondents of different demographic groups. Among these differences:

- Visitors have a better impression of parking availability/circulation and traffic flow than area residents.

- Those whose primary reason for visiting Del Mar Village is for work or to walk on the beach have the poorest impression of the district’s parking availability/circulation.

- Del Mar Village residents have the most negative impressions of the variety of goods and services; people who live elsewhere in Del Mar or who live outside Del Mar have significantly more positive impressions of the variety of goods and services available in the district.

- Del Mar Village residents have significantly more positive impressions of the quality of goods and services, the district’s safety, and its festivals and events than non-Village residents.

- People who live outside Del Mar Village (either elsewhere in Del Mar or outside the city) have a better impression of the district's attractiveness (buildings, streets, sidewalks), cleanliness, and traffic flow than Del Mar Village residents do.

- People under 35 years of age have a generally more positive impression of Del Mar Village than people over 35.

What people like, and don't like, about Del Mar Village

We asked people to tell us what they like and don't like about Del Mar Village. Responses to both questions were unusually consistent: people like the beach, the proximity to the ocean, the friendly environment, and the quaint atmosphere; they think there are not enough retail stores and not enough parking, and that parking enforcement is too strict.

We also asked survey respondents to tell us what kinds of new businesses they would like to see in Del Mar Village. Responses were quite varied – a bookstore, more restaurants, a pharmacy, hardware store, food store, ice cream, coffee shops, and a gas station were mentioned most frequently, along with a wide range of businesses mentioned only once or a few times (a bike store, cigar shop, hobby shop, and a movie theatre, for example). Many people suggested "boutiques", but surprisingly few specifically mentioned clothing stores.

Previous and ongoing planning initiatives

As part of our assignment, we reviewed almost two dozen plans and reports relevant to Del Mar Village that have been prepared for the City of Del Mar or other entities over the past 30 years (Table 22) in order to identify previous recommendations with regard to downtown economic development and to identify potential regulatory or planning barriers to downtown economic development.

1976	The Community Plan for the City of Del Mar
1979	San Dieguito Lagoon Resource Enhancement Program
1980	Carmel Valley Precise Plan
1982	Del Mar 2000 (The Jerde Partnership, Inc.)
1983	Land Use Plan (City of Del Mar Local Coastal Program)
1985	Community Plan | Recreation Element
1985	Community Plan | Community Development Element
1987	The Del Mar Hotel Specific Plan
1987	The Del Mar Plaza Specific Plan
1988	Landscape Development Guidelines (Ralph Stone & Associates)
1993	Land Use Plan (City of Del Mar | Local Coastal Program)
1993	Traffic and Parking Advisory Committee Report
1995	Camino del Mar Streetscape Plan
2000	1999-2004 Housing Element (Cotton/Beland/Associates)
2000	Parking Master Plan Report (Meyer, Mohaddes Associates, Inc.)
2001	Local Coastal Program Implementing Ordinances
2002	Del Mar Community Survey (San Diego State University's College of Business)
2003	Vision 2020 + Implementation Plan (TLS Management Consulting)
2006	Del Mar Work Lofts (Starr Design Group)
2007	Proposed 2007-2008 budget
2007	Office-Condo Market Overview for the City of Del Mar (Economics Research Associates)

Table 22: Previous and ongoing planning initiatives reviewed

We found that almost all plans and studies are consistent in characterizing the community's major planning goals, particularly with regard to preserving Del Mar's natural resources (the sand beach, open vistas, native trees, sandstone bluffs, and San Dieguito Lagoon), maintaining an "uncrowded village" of homes and businesses, and creating a vibrant, pedestrian-oriented commercial center.

Among the expressions of community goals with regard to Del Mar Village:

- **1976: *The Community Plan for the City of Del Mar***
  "Corollary to the citizens' desire to maintain Del Mar as an uncrowded village was the perception that Del Mar's business community should better serve local needs for goods and services and become more of a pedestrian-oriented compact center. Furthermore, it was felt that automobile traffic should not pose a hazard to life, should not intrude unnecessarily on the tranquility of community life, nor should it interfere with walkers and bicycle riders. Finally, it was felt by the citizens that a well defined community identity should be fostered by providing a centrally-focused downtown area having civic activities as well as commercial services; a residential area of decreasing density from the town center towards the outskirts; and a surrounding belt of natural open space to buffer Del Mar permanently from the sprawling adjacent residential areas."

- **1982: *Del Mar 2000***
  "The Del Mar 2000 program presented in this report represents a significant step forward into another area of environmental opportunity. This opportunities lies in the largely untapped potential of the Del Mar commercial district and how it can be developed to create a functional and symbolic center for the entire community. […] Thus, the concept behind Del Mar 2000 is to create an intimately scaled urban experience around an active, vital and pedestrian oriented downtown."

- **1995: *Camino del Mar Streetscape Plan***
  "Del Mar has invested heavily in this more rustic, 'village-in-the-woods' look and this is what distinguishes Del Mar from the other beach communities".

Most of the planning studies we reviewed stress physical improvements and the physical evolution of the district and the community (property development, transportation planning, design of public spaces) rather than exploring its economic evolution and, while some explore the fiscal implications of planning actions, most do not explore the potential *economic* implications of those actions. Only one – the 1976 Community Plan – explicitly mentions the need for a market framework for development and physical improvement activities.

We found some inconsistencies in recommendations regarding parking. For example, several plans – particularly the 1995 Streetscape Plan – recommend construction of additional parking structures, particularly on the west side of Camino del Mar. But the 2000 Parking Master Plan Report recommends a strategy focused primarily on gaining greater efficiency from existing parking areas.

Of all the plans we reviewed, we found this plan – the 2000 Parking Master Plan Report, by Meyer, Mohaddes Associates, Inc. – to be particularly consistent with our experiences in revitalizing older and historic commercial district. Among the points we found most compelling:

- While the north beach lots are heavily used during peak summer months, Village parking lots are “relatively under utilized”, even on weekends, with usage at City Hall and other south Village lots ranging from 0-18 percent.

- The consultants identified three major themes as a result of the community workshops it conducted:
    - Giving priority to residential parking,
    - Encouraging business patronage by residents, and
    - Encouraging alternative transportation modes and pedestrian environment

- The consultants recommended a number of options for better managing the district’s parking use and supply, including:
    - Working with the post office to provide on-site customer parking
    - Using the Seagrove Lot and/or train depot lot for beach and employee parking
    - Implementing a shared use parking program
    - Revising City codes to maximize efficiency
    - Launching a resident parking permit program
    - Providing a shuttle and valet service during peak seasons
    - Consolidating driveways to gain additional parking space

We understand that the City intended to implement several components of the parking study's recommendations, but that the Coastal Commission rejected the City's recommendations, insisting that all or no recommendations be implemented.

Key findings and observations

1. **Del Mar's low anticipated population growth means that little new retail market demand is likely to come from organic growth within the community.**

   SANDAG and the US Census Bureau predict virtually no population growth in Del Mar over the next decade, suggesting that there will be little new native market demand for retail goods and services in Del Mar Village.

2. **Little market demand exists to successfully support a cluster of businesses offering comparison goods and services.**

   Generally speaking, retail products and services can be classified in one of three ways:

   - Convenience: Products and services which people usually buy from the closest, most convenient businesses (like groceries and gasoline)

   - Comparison: Products for which people like to visit several stores and to compare different styles, brands and prices before making a purchase (like clothes, shoes and apparel accessories and, to a lesser extent, home furnishings)

   - Destination: Unique products and services for which people will travel significant distances, pay high prices, and/or develop loyalty to a particular business

   Shopping malls specialize in comparison products and services – particularly apparel and apparel-related products – and, in almost all regions of the country, malls have saturated this retail category. Stores that sell comparison products usually do best when clustered near a group of similar businesses, because shoppers perceive that they have a variety of options from which to choose. This means that, to support a cluster of businesses selling comparison goods, the market must usually be able to support three or four similar businesses, not just one – and it is very rare for a small or midsized community in an urbanized area to have enough unmet market demand to support a cluster of this size. For Del Mar Village, this makes the possibility of creating a cluster of apparel-related businesses very difficult. Only if apparel-related businesses also function as destination businesses might they be likely to succeed.

3. The district must actively support the retail needs of both community residents and visitors.

This seems like a somewhat obvious statement, but it is clear from the planning documents we reviewed, interviews we conducted, and even comments on the intercept and business surveys that there is, or has been, some discomfort with the concept of actively catering to both customer segments simultaneously.

Almost all older and historic commercial districts that achieve sustained economic growth do so, in part, by focusing on two or three distinct customer segments, rather than focusing on just one. Doing so provides market diversity and synergy, both of which are necessary for economic vibrancy. Del Mar Village is fortunate in having a linear district that is large enough (or long enough) to physically accommodate multiple retail nodes and in having two existing, relatively strong customer segments whose retail interests at least partially overlap.

4. Sufficient market demand exists to support some new community-serving and destination product lines and businesses in Del Mar Village.

The sales void analysis we conducted demonstrates that, even though Del Mar has enormous sales surpluses in visitor-serving retail categories, it is losing sales in some community-serving categories, such as groceries, drugs, hardware, medical supplies, and entertainment. And, even though the City's restaurants are achieving sales levels well beyond the demand generated by Del Mar residents, we believe there is local market demand for additional restaurants in Del Mar Village – particularly restaurants that offer experiences and cuisine that are different from what is currently available, thus complementing existing restaurants.

Our analysis of retail buying power in Del Mar, nearby North County communities, and the County as a whole also demonstrates that there is ample retail demand for specialty and destination products and services. Emphasis should be on businesses that will have regional appeal and also be of interest to visitors (even if simply by providing something unique for visitors to explore and experience).

The relatively large percentages of Del Mar residents who participated in the Del Mar Village consumer intercept survey and who said that they patronize Del Mar (and Del Mar Village) businesses for community-serving and destination goods and services suggest that community loyalty to the district is high, boding well for further development of these types of businesses. And, after having shifted to outlying shopping areas in the past several decades, a number of national retailers whose market focus is primarily on local needs – hardware stores, pharmacies, and food stores, for instance – have now begun turning their attention once again to older and historic commercial districts throughout the US, in large part because of growing recognition of community-serving market opportunities. We believe it is likely that the failure of earlier businesses in these categories in Del Mar Village might have been influenced as much as or more by inadequate store hours, negative perceptions of parking, and other factors unrelated to actual market demand.

5. **Sufficient market demand also exists to support new visitor-serving product lines and businesses.**

Del Mar's visitors have enormous buying power, dwarfing the cumulative buying power of Del Mar residents themselves. Although there is an absorption point beyond which Del Mar Village businesses might no longer be able to attract visitor purchases, the district does not have enough available retail space to reach this absorption point – and populating the district primarily with businesses that cater to visitors would be inconsistent with the community's wishes for a locally-serving district.

While there are certain types of businesses that visitors are most likely to patronize (restaurants, in particular), some types of community-serving businesses are also likely to appeal to them – and these businesses might need to augment purchases by community residents with purchases by visitors in order to survive. Visitors – particularly affluent visitors, and visitors to historic places – highly value authenticity and, unless there are no alternatives, are more likely to patronize businesses that appeal to community residents than to patronize businesses that appeal primarily or exclusively to visitors. In this way, community-serving businesses like hardware stores and pharmacies[13] are often able to

[13] See, for example, Economy Hardware (called "City Living Store" online) in Cambridge, Massachusetts and Osborn Drugs in Miami, Oklahoma.

survive by bridging two consumer groups. Given the community's long-stated preference for low traffic and a high level of local interaction, we believe that it businesses that appeal to both community residents and also to visitors are likely to fit Del Mar's personality better than businesses that appeal primarily to visitors.

6. **Del Mar Village's existing retail businesses have significant opportunities for sales growth.**

Ideally, any unmet retail market demand in Del Mar would be absorbed to the extent possible by existing businesses. While the temptation often exists to develop and/or recruit new businesses, many of an older commercial district's existing retail businesses are usually capable of expanding, adding new product lines, opening new sales channels, and possibly even spinning off a related business. Their familiarity with the district and its existing customers, and the community's familiarity with them, give them significant advantages and greater stability than new, start-up businesses.

We believe that Del Mar Village's existing retail businesses have three major opportunities to expand sales:

- <u>Selling more to local residents</u>: Local residents have enormous retail buying power. But there are many opportunities for them to shop outside Del Mar – and they do. Del Mar residents commute to work outside the city, they visit communities throughout the region to go to the theater and attend sports and other recreational events, they drive to San Diego's airport, and they patronize restaurants in neighboring towns. By offering home deliveries, curbside pickup, loyalty cards, special 'insiders' events, or even by simply creating a mailing list or email newsletter, the district's businesses can increase sales to local residents.

- <u>Selling goods and services to new visitors</u>: The tens of thousands of new visitors who experience Del Mar Village each year constitute a constant stream of customers for the district's businesses – but there are currently very few ways for a visitor to easily learn about what the district offers.

- <u>Cultivating ongoing relationships with one-time and occasional visitors</u>: The tens of thousands of people who visit Del Mar Village every year represent an enormous potential *ongoing* customer segment for the district's businesses. Having experienced a unique or interesting retail store and having had a positive experience, visitors are often interested in maintaining contact with the business after returning home, Yet, in our survey of Del Mar Village businesses, we found that only a handful have ecommerce websites[14]. We believe this is an enormous lost opportunity. More people visit Del Mar Village each year than will visit most American communities in half a century.

We cannot overemphasize the importance of the district's businesses having an online presence to help cultivate and sustain ongoing relationships with one-time and occasional visitors. Some examples:

- A shoe store owner in Iowa contacts a core list of several hundred distant customers every six months or so to ask about their shoe needs, tell them about new products in which he thinks they might be interested, and occasionally sends loyal customers shoes to try out, with no obligation to keep them.

- A bookstore owner in Arkansas who specializes in signed, first-edition books maintains an extensive database of every customer who has ever bought a collectible book from her, emailing customers when she obtains a book in which she thinks they might be interested.

- A second-hand clothing store in northern California offers an online "personal shopper" service. Distant customers complete an online questionnaire with information about their size, color, brand, style and price preferences, and when new items arrive that meet a customer's profile, the "personal shopper" sends an email message to the customer letting them know about the new merchandise.

It is perhaps worth noting that only online sales made to customers within California are subject to retail sales tax and therefore of direct fiscal benefit to the City of Del Mar – but, to the extent that the district's overall retail sales are boosted by cultivating relationships with distant customers, the district's retailers will be able to support higher rents, increasing the appeal of leasing space to retail businesses rather than offices and, in turn, boosting the overall economic performance of the entire district.

[14] Some of the district's retail businesses have websites that function as advertisements but that do not offer opportunities for customers to buy things online.

7. The relationship between commercial activity and commercial rents in Del Mar Village is weak.

Throughout our work with Del Mar we have heard numerous times, from a wide range of people, that Del Mar Village's property owners prefer to rent commercial space in the district to professional offices rather than to rent space to retail businesses because offices pay higher rents. While this is true in most economically underperforming commercial districts, it is usually not the case in high-performing commercial districts. In the San Diego metropolitan area, office space currently rents for an average of approximately $37 per square foot – and, while retail space in older commercial districts currently rents for an average of approximately $26 per square foot, retail space in shopping malls and high-end historic/traditional commercial districts rents for an average of approximately $42 per square foot[15]. Nationally, retail businesses pay rent equal to 8.9 percent of their gross sales, versus only 5.0 percent of gross sales allocated for rent by professional offices. Dollar for dollar, retail uses generate more revenue for commercial property owners in economically vibrant commercial districts than office uses.

8. Retail development in Del Mar Village is stymied by the intermingled, unplanned pattern of retail and office uses.

Although we heard from many people that the large number of offices in Del Mar Village is a problem for the district's economy, we do not believe that the presence of a large number of offices is a significant problem. In fact, offices typically attract customers who also shop at district retail businesses (13 percent of the people who participated in the Del Mar Village intercept survey said that their primary reason for visiting the district was to go to a professional office or to do errands). Many of the most economically dynamic historic commercial districts in the nation – districts like Provincetown, Massachusetts; Alexandria, Virginia; and Ann Arbor, Michigan – have as much or more office space as retail space.

---

[15] National retail chains allocate between 6-10 percent of their gross sales for rent. At $42 per square foot and a budgeted rent allocation of 8 percent, a retail business might therefore set a gross annual sales target of $525,000, a target already within reach of many Del Mar Village retailers.

But the *placement* of office uses in Del Mar Village is a problem. Retail contiguity – the placement of retail businesses next to one another – is crucial to a commercial district's retail performance. Commercial storefronts are intended to blur the public space of the sidewalk and street with the private space of the store within, visually inviting shoppers inside. When shoppers come upon a storefront that does not conform to this pattern – one that is set back too far from the sidewalk, or whose display windows are concealed with blinds, shades, or curtains – they perceive that the retail district has ended and that they should turn around, rather than continuing down the street. This is why shopping malls cover over the storefronts of vacant stores and mask them with murals, horizontal stripes or other visual devices that subtly encourage continued pedestrian movement.

In economically thriving historic commercial districts, office uses are almost always located in upper-floor spaces, side streets, and other peripheral or secondary locations. Communities that have successfully enacted "horizontal zoning" ordinances – ordinances that limit ground-floor space to retail uses – almost always have as much or more upper-floor space available for office and residential uses as they have ground-floor space available for retail uses.

Del Mar Village suffers from having very little upper-floor and peripheral space available to house office uses. In this way, the Cliffs project (for the former gas station site at the corner of 10th and Camino del Mar) is particularly responsive to local market opportunities and would most likely play a vital role in providing space for offices to relocate from the retail core of Camino del Mar to a secondary site with high visibility.

9. **It is not possible, given current funding sources, to both maintain the vistas and low site lines that characterize Del Mar Village *and* to attain the property or business density and/or retail sales levels needed to generate tax revenues sufficient to cover the costs of the streetscape plan, needed or desired amenities, and basic municipal services.**

Before Proposition 13[16], property taxation provided a mechanism for helping ensure that the community's businesses and residents generated sufficient property and retail sales tax revenue, development fees, and other revenues to support the district's service and infrastructure needs. But Proposition 13, unfunded state mandates, and state government raids on local government coffers have drastically cut back municipal funding for infrastructure and economic development in California communities. In addition, regulations protecting Del Mar's viewsheds prohibit density and thus preclude potential property tax revenues and related development revenues (sales taxes on construction materials, sales and use taxes on goods and services sold by businesses that might locate in the additional space created by more dense development, etc.) that might otherwise be generated by the commercial district.

The price tag for implementing Del Mar Village's streetscape plan, providing needed services, operating an aggressive retail management, solving and managing parking issues, and marketing the district significantly exceeds the municipal revenues possible from retail and property tax revenue. Even if most office spaces were converted to retail uses, the district simply has too little commercial space, given Proposition 13's constraints, to generate the municipal revenue levels needed to meet the district's needs. And the community's relatively high family and household income levels preclude the community from pursuing some of the types of government funding typically used for downtown development in less affluent communities.

Ample potential funding exists in the private sector, however, that could help achieve Del Mar Village's infrastructure and development needs. We believe that, through private contributions to a designated fund, a public improvements gift catalog, a business improvement district and other mechanisms, the community can voluntarily shift funding from the private sector to the public sector to cover the costs of creating the physical and commercial environment that Del Mar residents have repeatedly said they wish to achieve in Del Mar Village.

---

[16] Ironically, this is an issue shared with many older industrial cities in the Northeast, in the Midwest "Rustbelt", and in high-growth areas like Phoenix that are now approaching build-out of a property tax base inadequate to fund services and the provision of public infrastructure needed to stimulate further development and thus to grow property tax revenues.

10. **The regulatory and financial burdens of development in Del Mar Village discourage development activity within the district.**

    While the intentions behind passage of Measure B and the decision to require developers and property owners to include compliance with the streetscape plan in property improvement proposals are consistent with the community's goals of creating an attractive district, these actions have substantially inflated predevelopment costs and stalled development activity in Del Mar Village for almost 20 years. We believe that tools like form-based codes and Land Readjustment could help Del Mar achieve its goals of preserving and enhancing Del Mar Village's physical character while also reducing the regulatory burden and related development costs for developers by providing clearer guidance on desired project characteristics, streamlining development approvals, and providing greater public benefits, thus removing critical roadblocks in the development process while also helping ensure high quality projects.

11. **Del Mar has an unusually high percentage of commuters but relatively few public transit options.**

    Del Mar has the highest percentage of workers who work outside their place of residence in San Diego County (81 percent, versus 51 percent for the County overall), yet it is no longer served by light rail or other convenient commuter options. People who commute by car are much more likely to shop outside their home community than people who work within the community or who use public transportation to commute. We believe that, through a combination of actions that make it easier for community residents to patronize local businesses while also gradually working to restore train service, Del Mar can recapture retail purchases now being made by Del Mar residents outside the community.

12. **Parking is a problem – and the perception of a parking problem is, in and of itself, an even more significant problem.**

    The planning studies whose reports we reviewed are mixed in their recommendations, with some emphasizing the need to increase the supply of parking in Del Mar Village and others emphasizing the need to better manage the district's existing supply of parking. Pragmatically, we believe that much can be done in the near term to improve the mechanics of parking in Del Mar Village and public perception of parking in the district, and that there could be opportunities to increase parking supply in tandem with future development projects. None of the reports, however, explicitly explores the impact of specific land use decisions in determining parking needs, and we believe that careful long-term planning of the commercial uses on individual blocks can help alleviate some parking problems. We also believe there are some technical corrections the City can make relatively quickly to change the parking paradigm (for example, reducing the current requirement of one parking space per 300 square feet for retail space, which exceeds even the shopping mall industry standard of four spaces per 1,000 square feet). And we recommend some activities to alleviate the problem of the negative public perception of the district.

13. The district's marketing activities provide a good foundation for building visibility.

Del Mar Village's current events span the seasons, providing ongoing visibility for the district. With a more detailed retail development strategy, the district will be able to add additional activities and events that build on monthly and seasonal sales fluctuations, create bridges with other events in the community and in nearby communities, and reinforce Del Mar Village's distinctive image.

14. Engaging more people in the revitalization initiative will strengthen the program and speed its progress.

More than 60 people are actively involved in the Del Mar Village Association, representing a strong constituency for action. It is not uncommon, however, for communities of comparable size to have several hundred active volunteers. Such broad distribution of assignments builds a wide-reaching base of support, engaging numerous community organizations and interests and ultimately speeding a district's economic transformation.

Recommendations

We have based our recommendations on our analysis of Del Mar Village's economic opportunities and of its economic, fiscal, regulatory and programmatic constraints. We have drawn on best practices from communities throughout the US and, in some instances, Europe.

Develop retail concentrations for both community residents and visitors.
We recommend that Del Mar Village actively pursue both retail concentrations. Both are essential to the district's economic health; both are already established; and, by actively pursuing both, the community can help achieve balance between the two segments so that one does not supplant the other.

Both retail concentrations include convenience-oriented goods and services and specialty/destination goods and services. In many instances, product lines and businesses would have appeal for both community residents and visitors – and, in some instances, businesses would need to actively cater to both customer segments in order to achieve target sales levels.

- **Convenience-oriented retail:** We believe that Del Mar Village could realistically increase sales to Del Mar residents and residents of nearby communities (especially those commuting by car through Del Mar Village) in four categories of convenience-oriented retail goods and services by $3.6 million (Table 23). With slightly more aggressive marketing, we believe it could double this amount.

	Del Mar residents			Residents of nearby communities		
	Demand	Capture rate	Sales target	Demand		Sales target
Groceries	$ 8,946,000	10%	$ 894,000	$ 190,316,000	0.5%	$ 952,000
Dining out	7,853,000	15%	1,178,000	160,264,000	0.25%	401,000
Hardware	335,000	20%	67,000	7,339,000	0.5%	37,000
Reading materials	429,000	5%	42,900	8,719,000	0.5%	44,000
			$ 2,161,000			$ 1,433,000

Table 23: Conservative sales targets for *new* convenience-oriented goods and services

	Convenience-oriented goods and services
Retail sales target	$3,594,000
Primary customer segment(s)	Del Mar residents Residents of nearby communities (esp. those driving through)
Secondary customer segment(s)	Del Mar Village workers Visitors
Possible product lines	Specialty and gourmet grocery items Ethnic restaurants Upscale, unique restaurants (with liquor) Mid- and upscale take-away food Topic-focused books and magazines Hardware Do-it-yourself dog wash
Location	Camino del Mar between 10th-13th Streets

Table 24: Characteristics of a convenience-oriented retail business concentration

Product lines might include (Table 24):

- Specialty and gourmet grocery items. We recommend that this business (or businesses) include one or several products unique within the region or offering a selection of specialized grocery products not available in the region, creating a 'destination' within what might otherwise be an exclusively community-serving business (possible examples: fresh herbs for herbal tea; fresh truffles and truffled food products; Japanese beer; heirloom vegetables).

- Ethnic restaurants, both those not available in Del Mar as well as those not available in the region[17].

[17] The Del Mar Community Survey conducted in 2002 by San Diego State University's College of Business found that 69 percent of households responding to the survey say that they dine in "white tablecloth" restaurants in Del Mar; 41 percent dine in ethnic restaurants in Del Mar; 44 percent in family restaurants; and 32 percent in fast food restaurants.

- Mid- and upscale take-away food emphasizing carry-out gourmet dinners for community residents and commuters and carry-out lunches for beach visitors.

- Topic-focused books and magazines, perhaps offered as a secondary product line in a restaurant in order to relieve financial pressure from the product line[18] and provide a magnet for the restaurant (see, for example, Busboys and Poets, a Washington-based restaurant that features a small bookstore specializing in social justice publications and a performance space where authors can sign and read from their books).

- Hardware – again, perhaps offered as a secondary product line in a themed restaurant, or perhaps a department within a compatible business (home furnishings, for example).

- A do-it-yourself dog wash (see, for example, Dirty Dog, South Bark Dog Wash, and Laundromutt).

▪ **Visitor-serving retail:** We believe that Del Mar Village could realistically support an additional $2.3 million in gross sales in five categories of visitor-serving retail goods and services (Table 25). With more aggressive marketing, we believe this could double or event triple.

  Product lines would have some overlap with the concentration of community-serving goods and services and might also include (Table 26):

  - Unique and specialty home furnishings. With a significant percentage of Del Mar's households headed by people over 55 years of age, there is little retail demand for "starter house" furnishings. But there is ample market demand for upscale furniture and home furnishings. Again, we recommend offering one or more product lines that would be unique within the region and that might attract people from a large geographic radius.

[18] We do not believe there is enough unmet market demand to support a full-service bookstore in Del Mar Village, but we believe there is enough demand to support a small-scale book/magazine 'department' of perhaps 1,000-1,500 square feet in another business.

- A movie theatre/live performance space. We recommend incorporating a flexible-use theatre for live performances and film exhibition into the plans for the new city hall building; its peak parking need times would complement those of city offices well, and the space could be used for public functions when needed.

	3 million "visitor-days"			Del Mar residents		
	Demand	Capture rate	Sales target	Demand	Capture rate	Sales target
Groceries	$ 11,532,000	2%	231,000	(see above)		
Dining out	8,219,000	10%	822,000	(see above)		
Home furnishings	5,940,000	5%	297,000	6,010,000	5%	301,000
Entertainment	5,473,000	5%	274,000	6,369,000	5%	318,000
Reading materials	478,000	5%	24,000	(see above)		
			$ 1,647,000			$ 619,000

Table 25: Conservative sales targets for *new* visitor-serving goods and services

- **Destination and specialty businesses:** Given the size and affluence of the population in the North County area and in San Diego County overall, there is an almost limitless number of possibilities for businesses and product lines that might be of interest to Del Mar residents, that might also attract visitors from a broader radius, and that might enliven the district. Some examples from other communities around the US:

  - William Rees Instruments is a manufacturer of handmade, custom harps in downtown Rising Sun, Indiana. There is little local market demand for handmade harps – but, by marketing instruments online and through specialized catalogs, the business thrives. It also provides a pleasing, unexpected experience for people who visit the commercial district, enlivening the district and boosting its visibility.

  - A store in downtown Port Townsend, Washington specializes in salvaging clocks, compasses and other instruments from scrapped ships.

- A craftsman in Charlottesville, Virginia makes quill pens using traditional tools. His clients include the US Congress, which buys his pens for ceremonial signings.

	Visitor-serving goods and services
Retail sales target	$2,266,000
Primary customer segment(s)	Del Mar Village visitors Del Mar residents
Secondary customer segment(s)	Residents of nearby communities Affluent regional residents
Possible product lines	Specialty and gourmet grocery items Ethnic restaurants Upscale, unique restaurants (with liquor) Mid- and upscale take-away food Unique and specialty home furnishings Entertainment venues Topic-focused books and magazines
Location	Camino del Mar between 13th-15th Streets

Table 26: Characteristics of a visitor-focused retail business concentration

- **Other considerations:**
  - Store hours: We do not believe that all district businesses need to maintain late hours or be open on weekends. Unlike shopping mall stores, downtown stores serve many different types of customers and offer many different products and services. An office supply store that caters primarily to corporate clients, for example, would not be likely to appeal to people looking for a fine dining experience and would not benefit from maintaining hours consistent with district restaurants.

    But it is important that as many stores as possible that cater to visitors maintain evening and weekend hours and that as many stores as possible that cater to local residents extend hours slightly past 5:00 pm in order to give daytime workers an opportunity to shop. We believe that one of the most significant barriers to increased patronage of Del Mar Village businesses by community residents has been, and continues to be, the limited store hours of community-serving businesses in the district (negative perceptions of parking – supply and enforcement – are also a significant deterrent – see below).

It is difficult for 'mom and pop' business owners to work long hours – but it is very important that businesses catering to these two core markets try to do so. A few suggestions:

- Schedule special events in the district during extended business hours. If businesses are willing to remain open until 7:00 pm, for example, schedule events between 5:00-7:00 pm. We realize that Del Mar Village Association has scheduled some activities in this time slot in the past and that businesses have reported experiencing little impact. However, on average, it takes three years for community residents to become aware of a change in a downtown district's store hours – so, perseverance is critical.

- Encourage businesses to illuminate their storefront display windows and to leave their storefront lights on in the evenings. Storefront lighting is as important in encouraging people to shop, browse, and feel safe as street lighting. We recommend that businesses place their storefront display lights on timers, with lights remaining illuminated until at least 10:00 pm.

- Discuss the math with business owners. If a business owner paid someone $15 per hour for three hours per weeknight and one eight-hour weekend day to operate the store, enabling the store owner to go home, the salary cost for the staff person would be $345. With added utility costs, the total expense might edge towards $400. Using Keystone markup, the business would need to make $800 in additional sales that week to cover the costs of keeping the store open several additional hours in the evening – a very achievable goal, particularly considering the growing percentage of retail sales that take place after 5:00 pm and on Sundays.

We also recommend that Del Mar Village landlords begin specifying required hours of operation in the leases they negotiate with retail tenants for which store hours consistent with similar district businesses is appropriate.

- Delivery services: Del Mar has a high percentage of two-income households and commuters, and weekday shopping time is therefore likely to be somewhat constrained. A group of businesses might consider offering a daily or twice-a-day delivery service for local residents, making it easier for them to patronize district businesses.[19]

- Web-based sales: It is imperative that Del Mar Village businesses increase their web presence. We will discuss this in greater detail later in this report.

- Small-ticket items, easy to pack in a suitcase: In districts with large numbers of visitors, it is helpful for retail businesses that cater primarily to local residents to offer some small-ticket items (under $50) that are easy to pack in a suitcase and to display these items in the first ten feet of the store. Items like these may appeal to visitors who might otherwise not purchase things from community-focused businesses, even though they may enjoy getting to know the community by browsing in these businesses.

- Convenience parking: To alleviate concerns about parking tickets, businesses might offer a free 15-minute parking smartcard to customers making purchases, to be used on a future trip to the store (see also page 64).

- Loyalty card: There are numerous models for these, including a new one being developed by InterraProject – an automated, community-based loyalty card that functions much like the cards now commonly used by supermarkets and drug store chains. It is designed to have a payment feature (MasterCard or Visa) added at a future date. The businesses themselves determine the specific benefits of their shopping incentive and they can manage their offering by direct access to an account on the card's website. And it provides a rebate on sales to a designated community-based organization.

[19] For a well-developed variation of this, see Pop to the Shops, a web-based Welsh company that facilitates orders from downtown food stores and makes deliveries to community residents.

Actively pursue ongoing business relationships with one-time visitors.
As is the case with businesses in most communities with a large seasonal population or tourism base, Del Mar Village's businesses have a superb opportunity to develop long-term, ongoing business relationships with one-time or occasional visitors. We strongly encourage the district's retail businesses to develop email and snail-mail address lists, noting what items or services customers buy, and to set a modest goal of maintaining contact with just one or two new customers each week, perhaps sending a periodic postcard or handwritten note announcing a new product or sending an email to offer to assist with holiday or special occasion shopping.

Increase the internet presence of Del Mar Village businesses.
Research we have conducted in 30 historic commercial districts throughout the US this past year suggests that internet-based sales now represent approximately 18 percent of the overall sales generated by these districts' independently owned businesses. The more specialized a business's products and services, the more important internet-based sales are to its overall earnings. While the chances are remote that any one Del Mar Village retailer will be come an Amazon.com-like destination, Del Mar Village's merchants can use online retailing to great benefit by extending what they already do best: selling unique items with personalized service.

Del Mar Village already draws tens of thousands of non-local visitors to its stores and restaurants every year. Each of those visits presents an opportunity for a district retailer to establish an ongoing relationship with that customer, cultivated through email (e.g., through a service like Constant Contact), regular mail, and telephone contact – and the potential for capturing retail orders through an online storefront. It will be far more productive for Del Mar Village retailers to nurture those in-store relationships and turn them into online relationships rather than by trying to establish themselves as stand-alone websites found through search engines.

We therefore strongly encourage Del Mar Village's businesses to develop ecommerce websites and to actively promote them. Some suggestions:

- Start small. Services like Shopify make it possible for businesses to sell just several items online without needing to design or maintain a website. Businesses simply pay Shopify a small percentage of sales for providing the website and processing sales orders.

- Study other small business websites. There are many very creative and successful small business websites that might provide inspiration to district businesses.

- Share order fulfillment duties. For example, a group of retailers in State College, Pennsylvania, takes turns packaging and shipping internet-based orders for the group. A candy store in Littleton, New Hampshire turned its mail order fulfillment operations into a school project for a local high school, letting the students keep the shipping profits in exchange for fulfilling orders. If internet-based orders grow sufficiently, there might be enough demand for a new business that provides order fulfillment services for a number of district businesses, possibly also offering local delivery services (see above).

- Link individual business websites to a dynamic, energetic site for the entire district. See, for example, several of the websites created by Joint Concepts using its "Main Street Vitality Engine" for historic commercial districts:
    - Adams Morgan Now
    - Experience Copper
    - MidCity Live

  Businesses have their own web portals through which they can update information about events and sales specials in their shops, with overall information on the district provided by the local downtown management organization.

Enhance the concentration and visibility of retail businesses around the two retail hubs.
As we mentioned earlier in this report, retail contiguity and continuity are crucial components of successful retail development initiatives. Districts with high numbers of non-retail uses (including vacancies) interspersed among retail businesses are rarely successful in expanding retail sales. Offices, small manufactures and other non-retail uses are crucial to the economies of older downtowns, and it is important to keep them within the district. Unfortunately, Del Mar Village is stymied by having too few upper-floor and peripheral spaces from which non-retail businesses might operate. It is largely for this

reason that we believe the proposed Cliffs project will be so valuable for Del Mar Village, creating space for professional offices and other non-retail uses within the district and freeing up ground-floor space for retail businesses.

- **Short-term actions:** Relying on attrition to reconfigure land use in an older commercial district takes many years. But there are a number of things that can give a district a stronger retail presence in the interim. These include:
  - Encouraging non-retail businesses to enliven their storefront windows. Putting something active in the storefront window or letting a retail business display products in the window creates the sense that the window is part of the retail streetscape.
  - Installing banners on retail businesses. The motion draws attention and subtly draws shoppers from one retail store to the next, minimizing the visibility of non-retail uses.
- **Long-term actions:** As the colloquial expression says, "The best time to plant a tree is ten years ago." Actions that Del Mar takes now to help increase retail density will bear fruit in 10 or 20 years. Some long-term actions to consider:
  - Horizontal zoning: We recommend that the City incorporate a permanent version of the temporary 'horizontal zoning' ordinance into a new form-based code (see below).
  - Land Readjustment: Land Readjustment (sometimes called "land pooling") has been widely used in France, Germany, Hong Kong, Lebanon, the Netherlands, Japan, and several other countries as a tool for assembling property for redevelopment. Unlike eminent domain, in which local government takes property from private owners, compensates them for the property, and redevelops it for a public purpose, Land Readjustment involves property owners and local government volunteering to pool their property and make collaborative decisions about how to redevelop it. Land is usually also set aside for public facilities (parks, parking garages, roads, sidewalks) during the Land Readjustment process.

On a much simpler scale, Del Mar Village property owners could simply agree to trade their property with one another in order to cluster retail uses together and office uses together, making up differences in value with cash payments, and with the City perhaps participating by agreeing to abate property taxes for priority parcels for a certain number of years. We think that, for interested property owners, this could be a very viable tool for speeding up the process of clustering retail uses and office uses in Del Mar Village.

Replace the district's existing zoning and appearance codes with a form-based code.
We recommend that Del Mar explore the possibility of adopting a form-based code to guide design and development decisions in Del Mar Village, replacing most of the current relevant zoning ordinances, the comprehensive plan, streetscape plan, landscape plan and other design regulations relevant to the district with the new form-based code.

Form-based codes streamline the development process by making all desired design elements clear from the beginning, making development decisions more predictable. Unlike traditional zoning codes that concentrate primarily on building use, with design being a secondary consideration, form-based codes concentrate primarily on design, with use being a secondary consideration. The codes themselves are heavily illustrated, providing very specific guidance on location, building form, and the design of buildings and streetscape elements. Community members are heavily involved in shaping the form-based code, with major design issues being resolved at that stage, rather than being debated when each new development or building improvement project is proposed.

Some communities have adopted form-based codes as an option that developers and property owners can choose as an alternative to existing development regulations. Projects that meet the form-based code's requirements receive expedited approval and, in some cases, development incentives (such as density bonuses or tax abatement).

Form-based codes were officially authorized in California by Assembly Bill 1268, signed into law in 2004. A growing number of California communities have adopted form-based codes, including Azusa, Petaluma, Sonoma and Ventura. Petaluma's "SmartCode" has been widely credited with clearing up nearly a decade of conflict over creation of a specific plan for a key downtown redevelopment site.

Resources:

- "Form-Based Codes: Implementing Smart Growth", by the Local Government Commission

- *Smart Growth Zoning Codes: A Resource Guide*, also by the Local Government Commission

- *The SmartCode Solution to Sprawl*, by the Environmental Law Institute

- National Association of Realtors Smart Growth Program's website on land use, zoning and growth management. The National Association of Realtors also offers a small grant program (maximum grant: $3,000) to help community organizations advance smart growth initiatives, including organizing public workshops and sponsoring speakers to learn more about form-based codes.

- SmartCode Central provides online models of form-based codes and code modules.

- Form-Based Codes Alliance

Specialists:

- Crawford, Multari and Clark
- Dover, Kohl and Partners

Expedite completion of the streetscape plan.
We believe the streetscape plan will significantly enhance the physical environment and vitality of Del Mar Village – but it appears that its implementation has created some logistical problems that need to be resolved in order to encourage private-sector development and ensure design consistency in the district. Some suggestions:

- Incorporate the design components of the streetscape plan into the new form-based code (see above).

- Shift responsibility for implementation of the streetscape plan from the private to the public sector. Private property owners and developers might still contribute a *pro rata* share of the costs, but we believe that shifting responsibility for design, construction and additional funding will alleviate a development burden and encourage property improvement.

- Pursue a SAFETEA-LU grant to pay for completion of most or all of the streetscape. SAFETEA-LU (Safe, Accountable, Flexible, Efficient Transportation Equity Act: A Legacy for Users) provides funding for surface transportation projects through 2009. Twelve transportation enhancement activities are specifically permitted by the federal legislation (23 U.S.C. 101(a)(35)), including pedestrian and bicycle facilities, acquisition of scenic easements, scenic/historic highway programs (including signs, markers, construction of visitor centers, viewing areas, etc.), and landscaping (including street furniture, lighting, and landscaping along streets). There are no maximum grants; in fact, CALTRANS made one of the largest transportation enhancements in the US in 2004 - $21 million – to purchase scenic easements and preserve viewsheds at the Hearst Ranch in San Luis Obispo County. Funding from SAFETEA-LU and its two predecessor programs, ISTEA and TEA-21, have supported scores of historic preservation activities and transportation-related programs in historic downtowns over the past decade.

    Resources:

    - The National Transportation Enhancements Clearinghouse provides state-by-state information and a guidebook to transportation enhancements, *Enhancing America's Communities*.

    - Dan Costello, a government affairs consultant to the National Trust for Historic Preservation, has written extensively about the use of transportation enhancement funding in older and historic neighborhoods and downtown commercial districts. See, in particular, "Ten Years of Transportation Enhancements", also published by the National Transportation Enhancements Clearinghouse.

Create a dedicated funding source for the district's development and management.
The costs of needed capital improvements, marketing activities, business development activities, targeted incentives, and other programmatic and administrative costs involved in successfully revitalizing, managing and sustaining a historic commercial district can be considerable. We estimate that a realistic budget for the Del Mar Village Association to coordinate revitalization, business development and

marketing activities for the district would be $150,000-$200,000 annually, not including the costs of capital improvements and depending on the ability of public- and private-sector partner entities to commit *pro bono* resources to the initiative.

Like many older cities, and particularly like those with strong land conservation programs, Del Mar has essentially reached build-out, and municipal revenues that typically flow from growth (like construction-related retail sales tax and property tax from new housing development) are slowing down – but the costs of providing ongoing services continue to grow, and aging infrastructure will require capital expenditures in the not-too-distant future.

We recognize that Proposition 13, the state's budget crisis, and other factors have negatively affected Del Mar's municipal budget and that many of the financing options available to many communities for streetscape improvement projects, such as Community Development Block Grants and redevelopment-based tax increment finance, are not available to Del Mar because of the community's relative affluence. We therefore believe that the City is unlikely to be able to fund many of the services and initiatives needed to stimulate and sustain economic growth in Del Mar Village. But the resources do exist in the community's private sector, and we recommend that the City, Del Mar Village Association, and other partners structure a funding program to tap private-sector resources for Del Mar Village's revitalization and management[20].

We recommend the following key components of this funding program:

- **A private fund:** Many downtown development organizations create private funds to help finance construction of streetscape projects. Bluffton, Indiana's Main Street program, for example, raised $1.8 million in private-sector contributions over the course of six months, with the help of 200 volunteers, to pay for public infrastructure improvements. The Central Pennsylvania Festival of the Arts raises several hundred thousands of dollars annually, with activities ranging from $50 solicitation letters to a black-tie auction offering the privilege of collecting trash during the Festival – and of getting a coveted "The Proud, The Few, The Trash Crew" baseball hat – to the highest bidders.

[20] Private-sector funding for public improvements in Del Mar Village was also one of the recommendations included in the Vision 2020 long range plan.

- **A public improvements gift catalog:** A catalog listing of needed public improvements – street furniture, sidewalks, landscape elements, bike racks, etc. – would make it possible for individuals, organizations and businesses to sponsor elements of the streetscape plan and donate them to the City, the Del Mar Village Association, or another nonprofit entity, receiving a charitable tax deduction. Sponsored components often display a plaque or inscription acknowledging the name of the contributor and/or the entity in whose honor or memory it was donated. A few examples:
  - Moose Lake, Washington
  - Cordova Park, California
  - Longmont, Colorado
  - Auburn, Washington

- **A tourism improvement district:** We encourage Del Mar to create a tourism improvement district, assessing a small flat fee or percentage on each lodging night and using the revenue to promote the city and Del Mar Village.

- **A business license surcharge:** Polk City Directories lists 1,150 businesses in Del Mar. A $25 surcharge on each business license would raise $28,750 annually – not nearly enough to cover all the costs of improving and managing Del Mar Village, but enough to pay for certain components. We recommend that revenue from this surcharge be dedicated to activities that help boost business sales, such as training workshops, one-on-one business assistance (internet marketing, visual merchandising, etc.), an 'activities' website for the district, and events that bring people to Del Mar Village.

- **A business improvement district:** We encourage Del Mar to create a business improvement district – but not for several years. California's BID enabling legislation makes it possible to create BIDs using business assessments or property assessments (P-BIDs), and we believe either could work well in Del Mar Village. Property or business owners agree, by majority vote, to create the BID and to pay a special assessment each year, with funds being used to provide needed services and/or to augment municipal services. It generally takes several years to lay the groundwork for successful implementation of a P-BID – creating and using a monitoring system to track economic changes, developing consensus among property and business owners, etc. As the district's economy improves – sales increase, rents increase, property values increase, etc. – the BID essentially funnels a small percentage of that increased economic activity back into the ongoing management of the district. Main Street programs and BIDs fit together well, with the BID providing some of the funding needed and the Main Street program providing program direction. We believe that, within 3-5 years, enough improvement activity could take place to make a BID feasible.

In the course of our assignment, we also explored the theoretical possibility of Del Mar shifting from its current two-pronged *ad valorem* property tax (in which both land and improvements taxed) to a single-pronged land value tax[21]. Proponents of land value tax[22] argue persuasively that it discourages property speculation, neutralizes pressure to intensify development (land value remains constant regardless of the type, density or age of improvements), and creates incentives (in the form of higher land value) for improvement of neighborhoods, commercial districts, and public spaces. Although we ultimately chose not to further pursue this potential recommendation, we believe it may be worth further investigation by the City as a way of equitably tapping property value and alleviating development pressure in Del Mar Village. Land value tax was pioneered a century ago in California (and is largely responsible for preservation of agricultural land in the Central Valley) and has recently been adopted by a number of Pennsylvania communities.

Change the district's parking paradigm.

Del Mar Village has developed a very negative reputation[23] for its strict enforcement of parking regulations and for its $35 parking fines. While rigid enforcement encourages parking turnover and generates municipal revenue, it also discourages customer loyalty and damages the image of the district.

Older commercial districts were not designed for the type or volume of traffic they must now accommodate, and the solutions to alleviating parking and congestion problems are ultimately unique to each community and each district. Common goals include:

---

[21] See, for example, Dale Bails, "Two Municipal Revenue Sources Contrasted: The Land Value Tax and the Property Tax", in the *American Journal of Economics and Sociology*, Vol. 33, No. 2 (April 1974), pp. 187-199, available online via JSTOR.

[22] The nonprofit Lincoln Institute of Land Policy has been a major proponent of a land value tax since its inception.

[23] In the intercept survey we conducted of Del Mar Village visitors, we found that most types of visitors have a relatively negative impression of parking and circulation in Del Mar village – but business owners have the most negative attitudes of all.

- Balancing retail uses with office, residential and other non-retail uses so that a district's retail functions are supported as much as possible by auto-independent shoppers (like downtown workers and residents of nearby neighborhoods)

- Persuading, inducing or requiring district workers to use parking spaces that are farther away from the district core, leaving closer spaces for customers and short-term users

- Planning business locations so that, to the extent possible, nearby businesses and institutions can share parking (e.g., grouping offices that use parking primarily during the day near restaurants that use parking primarily in the evening)

- Encouraging use of alternative, more land-efficient forms of transportation, like biking, ride-sharing, and light rail

We were impressed with many of the recommendations made in the 2000 Parking Master Plan Report. While we are aware that the City's plan to move forward with many of its recommendations were rejected by the Coastal Commission, we recommend that the City reopen discussions with the Commission about the likely value of the report's recommendations for the community and its natural resources.

In the long run, we believe that creating a parking authority that could manage all the district's parking spaces (public spaces, plus those private spaces for which owners are willing to partner with the City in a central parking management program) will best address Del Mar Village's parking needs. We believe that Del Mar Village does not suffer from a parking *shortage* but that, as in most older commercial districts, its parking supply is fragmented and controlled by a variety of owners, with public perception shaped largely by the availability, condition and enforcement of only the most visible parking spaces in the district.

But, in the short run, there are a number of remedies that might alleviate some of the frustration and perception problems:

- Refit parking meters to accept smartcards for payment and/or to accept pay-by-phone payment.

Smartcards function like debit or gift cards; the card holder loads the card with a certain amount of money, and the card is then inserted into a parking meter to make payment in whatever amount the card holder chooses, up to the card's amount of the card's unexpended value. Del Mar Village business owners could give 15-minute cards to customers who make purchases, making it easier for them to visit again (and more likely that they will do so). Organizers of events at the Fairgrounds and Race Track could give parking smartcards to people who attend events. Restaurants could make them available to dinner patrons. We believe that the gesture of offering a free few minutes of parking could create considerable good will and help reverse the negative image of parking in Del Mar Village.

Pay-by-phone systems make it possible for people to pay for metered parking by calling a telephone number and punching in authorization for a certain amount of parking. If a parker extends his or her visit to the district, he/she simply needs to call the number and authorize additional time, avoiding a parking citation (see, for example, Verrus).

- Allow developers to pay *in lieu* parking development fees rather than creating on-site parking. This would help the City accumulate funds to construct a larger parking facility in conjunction with construction of the new city hall.

- Encourage the use of alternative modes of transportation (bicycles, shuttles, etc.) in Del Mar Village to reduce the number of cars on the roads and alleviate perceived demand for parking.

- Actively promote positive aspects of parking availability in Del Mar Village. As parking management improvements are introduced, provide ample publicity to help counter negative public and business owner attitudes about parking in Del Mar Village.

In general, we support the concept of providing peripheral and remote parking that might then be connected to the town center via shuttles (Chattanooga has had particular success with this), but remain unconvinced that Del Mar Village has a parking shortage significant enough to warrant this sort of solution.

A few successful parking models from other communities:

- **Ashland, Oregon's parking zones:** Ashland hosts an internationally renowned annual Shakespeare Festival – so, like Del Mar, it experiences a seasonal surge in visitors that creates a short-term parking crunch. Ashland created three parking management zones downtown – "Core", "Intermediate", and "Periphery" – with a parking management system for each zone. The parking zones shared several key principals, including making the hourly rate for parking in off-street parking facilities equal to the hourly rate for on-street parking, and adjusting rates as needed to shift employees to parking spaces outside the Core parking zone and to maintain 85 percent peak occupancy in the Core and Intermediate zones.

- **Austin, Texas's Parking Benefit District:** Austin created a Parking Benefit District to help manage spillover parking from commercial districts into residential neighborhoods. On-street parking spaces in residential neighborhoods adjacent to commercial districts are metered (residents receive parking permits), and revenues from the meters are used for neighborhood transportation enhancements, like upgrading sidewalks and creating bike lanes. The city piloted the program with a grant from the US Environmental Protection Agency's Mobile Source Outreach Assistance Program.

Create a promotional program that reinforces the districts' dual-focus retail development strategy and that highlights Del Mar Village's heritage and personality.
In general, we encourage three types of promotional activity:

- Retail promotion is intended to bring customers into stores and generate sales. Retail promotional events are usually organized by, or in conjunction with, a merchants association or chamber of commerce, with the Main Street program collaborating to help ensure consistency in the message and image the retail promotional events communicate. Retail events should not be confused with *sales* or *clearance* events but, instead, should emphasize the quality and variety of products, services, and experiences available in the district.

- Special events and festivals are intended to bring people into the district.

- Image-building activities are intended to change perceptions of the district. They might be shaped by actual events, ads, 'buzz' campaigns, press conferences or any number of other tools.

We have found it helpful to develop a calendar of events that dovetails with existing local retail shopping patterns (Table 27), scheduling retail promotional events at times when people are in the habit of shopping, scheduling special events and festivals during blocks of time when retail events are not taking place, and using image-building activities to help provide a consistent public message and image.

The Del Mar Village Association currently organizes several major seasonal events – Summer Solstice, Taste of Del Mar, Art Stroll, and Holiday Wonderland – as well as a concert series during the summer. We believe these provide a solid 'special events' foundation, and we recommend augmenting these events with a program of retail promotional activities and image-building activities. After the Del Mar Village Association has reviewed our retail development recommendations, we will work with the Association to create a promotional program for the district that:

- Encourages movement along Camino del Mar and through the district (e.g., music or food stations spaced along the street to draw people through the district)
- Builds on the district's and the community's heritage and personality
- Reinforces development of the district's two primary areas of retail focus.

January 2006	$98,781
February 2006	106,026
March 2006	127,542
April 2006	127,309
May 2006	132,414
June 2006	144,247
July 2006	215,060
August 2006	233,335
September 2006	132,054
October 2006	120,632
November 2006	113,423
December 2006	80,952

Table 27: 2006 Transient Occupancy Tax revenues, by month (*Source*: Del Mar Office of Finance)

Sources of information

In addition to the reports listed on page 35, we also reviewed a number of other sources, including:

- *Demographic and Economic Forecasting Model – DEFM Forecast 1993-2015, vol. 1 (July 1993),* by the San Diego Association of Governments (SANDAG).
- *2007 San Diego Tourism Outlook*, by the San Diego Convention and Visitors Bureau
- *San Diego County TOT Collections*, by the San Diego Convention and Visitors Bureau
- *2000 Census of Population* (US Census Bureau)
- *2002 Economic Census* (US Census Bureau):
    - *Census of Retail Trade*
    - *Census of Transportation and Warehousing*
    - *Census of Information*
    - *Census of Finance and Insurance*
    - *Census of Real Estate and Rental and Leasing*
    - *Census of Professional, Scientific, and Technical Services*
    - *Census of Management of Companies and Enterprises*
    - *Census of Administrative and Support and Waste Management and Remediation Services*
    - *Census of Educational Services*
    - *Census of Health Care and Social Assistance*
    - *Census of Arts, Entertainment, and Recreation*
    - *Census of Accommodation and Food Services*
    - *Census of Other Services*
- *Census of Population – 2005 population estimates*
- *2006 Consumer Expenditure Survey* (US Bureau of Labor Statistics)

- *The Dollars and Cents of Shopping Centers* (Urban Land Institute)

- *Polk City Directories*

We also reviewed numerous articles in *Del Mar Times, North County Times, San Diego Union-Tribune*; minutes of City Council and task force meetings; websites of Del Mar-based organizations and agencies; and Google Map's Street View, which made it possible for us to walk the length of Camino del Mar, virtually, numerous times from our office in Virginia.

Disclaimer

Retail market analyses, their components (such as retail sales gap analyses) and derivative business development plans provide important guidance on how the area's commercial centers should, theoretically, be able to perform and on the sales and rent levels businesses should be able to achieve. However, a number of factors affect the actual performance of retail businesses and commercial centers, including the skills of the business operator, level of business capitalization, quality of the physical environment, changes in overall economic conditions, district marketing programs, and numerous other factors. The information and recommendations in this sales gap analysis report are intended to provide a foundation of information for making retail development decisions in Del Mar, but they do not and cannot ensure retail success.

We have made all reasonable efforts to research the basis for all findings and conclusions as thoroughly as possible. We have noted several specific data limitations on pages 3-4 of this report.

This report's findings, conclusions, and recommendations are solely those of the consultant and should not be assumed to represent the opinions of the City of Del Mar or any other party.

About the Community Land Use and Economics Group

The Community Land Use and Economics (CLUE) Group is a consulting firm that helps communities create vibrant, dynamic downtowns and neighborhoods.

We help local and state governments, developers, and nonprofits design innovative downtown economic development strategies, cultivate independent businesses, recycle historic buildings, attract young talent, strengthen downtown management programs, and craft planning and land use tools that mitigate sprawl and stimulate town center development.

We specialize in downtowns. CLUE Group principal Kennedy Smith directed the National Trust for Historic Preservation's National Main Street Center for 13 years and is considered one of the world's leading experts on downtowns, downtown economics, independent business development, and the economic impact of sprawl, with a career in downtown revitalization spanning 25 years. She created the retail market analysis methodology now used by most historic downtowns in the United States. Josh Bloom, our second principal, spent ten years as a program officer at the National Trust's Main Street Center, focusing on the economic and organizational dynamics of commercial district revitalization, particularly in urban neighborhoods. Both Kennedy and Josh served as the managers of local downtown development organizations before joining the staff of the National Main Street Center.

www.cluegroup.com

Appendix: Detailed intercept survey data

Why do people visit Del Mar Village?

Primary reason for visiting	All	Gender: Female	Gender: Male	Residence: Del Mar Village	Residence: Elsewhere in Del Mar	Residence: Somewhere other than Del Mar	Income: <$70,000	Income: >$70,000	Age of householder: Under 25	Age of householder: 25-34	Age of householder: 35-44	Age of householder: 45-54	Age of householder: 55-64	Age of householder: 65-74	Age of householder: 75 or over
I'm a visitor or on vacation	13%	12%	15%	0%	2%	20%	10%	14%	11%	8%	24%	14%	14%	11%	-
I work in Del Mar Village	14%	13%	15%	9%	17%	15%	16%	12%	14%	16%	9%	20%	17%	-	13%
Dining out	23%	23%	22%	16%	30%	23%	21%	22%	38%	34%	24%	17%	10%	6%	-
Coffee	2%	3%	1%	3%	6%	2%	-	3%	-	2%	3%	5%	3%	-	-
Shopping	11%	9%	12%	20%	6%	9%	10%	10%	11%	7%	10%	9%	15%	17%	-
Browsing	5%	5%	4%	1%	4%	6%	4%	5%	7%	7%	3%	4%	3%	-	-
Doing errands	9%	8%	10%	14%	17%	6%	8%	9%	-	7%	11%	9%	15%	22%	13%
Visiting a professional office	4%	2%	5%	1%	2%	0%	3%	4%	3%	5%	3%	2%	4%	-	-
I live here	6%	7%	5%	21%	9%	1%	10%	4%	4%	2%	7%	5%	4%	17%	38%
Walking/exercise	3%	4%	3%	9%	2%	2%	2%	4%	-	2%	-	4%	4%	11%	38%
Walking on the beach	3%	4%	2%	0%	4%	4%	4%	3%	4%	3%	1%	1%	6%	11%	-
Walking the dog	1%	1%	2%	4%	2%	0%	1%	1%	-	-	1%	1%	3%	-	-
Other	9%	9%	9%	3%	4%	12%	11%	8%	13%	13%	6%	12%	6%	6%	-
	100%														

Why do people visit Del Mar Village? (INVERSE)

		Gender		Residence			Income		Age of householder						
Primary reason for visiting	All	Female	Male	Del Mar Village	Elsewhere in Del Mar	Somewhere other than Del Mar	<$70,000	>$70,000	Under 25	25-34	35-44	45-54	55-64	65-74	75 or over
I'm a visitor or on vacation	100%	48%	52%	-	2%	98%	25%	75%	12%	10%	33%	22%	20%	4%	-
I work in Del Mar Village	100%	48%	52%	13%	17%	70%	37%	63%	15%	19%	11%	30%	23%	-	2%
Dining out	100%	48%	52%	14%	19%	67%	31%	69%	26%	26%	21%	17%	9%	1%	-
Coffee	100%	54%	46%	22%	33%	44%	-	100%	-	11%	22%	44%	22%	-	-
Shopping	100%	78%	22%	37%	7%	56%	32%	68%	16%	11%	18%	18%	29%	8%	0%
Browsing	100%	48%	53%	6%	11%	83%	28%	72%	27%	27%	13%	20%	13%	-	-
Doing errands	100%	56%	44%	31%	26%	43%	29%	71%	-	11%	23%	20%	31%	11%	3%
Visiting a prof. office	100%	49%	51%	33%	33%	33%	29%	71%	17%	25%	17%	17%	25%	-	-
I live here	100%	36%	64%	70%	22%	9%	52%	48%	10%	5%	24%	19%	14%	14%	14%
Walking/exercise	100%	58%	42%	54%	8%	38%	15%	85%	-	8%	0%	25%	25%	17%	25%
Walking on the beach	100%	62%	38%	0%	17%	83%	42%	58%	17%	17%	8%	8%	33%	17%	-
Walking the dog	100%	75%	25%	60%	20%	20%	20%	80%	-	-	25%	25%	50%	-	-
Other	100%	40%	60%	6%	6%	89%	40%	60%	21%	24%	12%	29%	12%	3%	-

Attitudes about various characteristics of Del Mar Village (1="Poor"; 2="Good"; 3="Excellent")

		Gender		Residence			Age						
Characteristic	All	Female	Male	Del Mar Village	Elsewhere in Del Mar	Somewhere other than Del Mar	Under 25	25-34	35-44	45-54	55-64	65-74	75 or over
Variety of goods and services	2.19	2.14	2.11	1.69	2.00	2.27	2.53	2.33	2.00	1.96	2.01	1.72	2.22
Quality of goods and services	2.67	2.55	2.59	2.51	2.00	2.27	2.79	2.64	2.60	2.43	2.61	2.00	2.44
Merchant helpfulness, product knowledge	2.55	2.43	2.38	2.39	2.00	2.27	2.55	2.30	2.32	2.48	2.49	2.11	2.44
Attractiveness of the buildings	2.60	2.56	2.57	2.35	2.51	2.63	2.79	2.69	2.56	2.53	2.47	2.17	2.67
Attractiveness of streets, sidewalks	2.60	2.54	2.58	2.27	2.49	2.64	2.72	2.75	2.65	2.53	2.35	2.22	2.44
Cleanliness	2.73	2.67	2.71	2.53	2.53	2.77	2.83	2.88	2.75	2.64	2.61	2.44	2.11
Safety	2.79	2.70	2.70	2.68	2.67	2.70	2.74	2.86	2.76	2.64	2.64	2.22	2.78
Festivals + events	2.53	2.12	2.17	2.52	2.23	2.00	2.09	2.17	2.18	2.10	2.22	1.94	2.33
Parking availability + convenience	1.74	1.70	1.70	1.75	1.40	1.75	1.62	1.81	1.81	1.71	1.68	1.56	1.44
Traffic flow	1.81	1.78	1.76	1.62	1.70	1.82	1.79	1.80	1.86	1.80	1.77	1.11	2.22
Shopping hours	2.23	2.10	2.10	2.16	2.16	2.06	2.12	2.00	2.19	2.12	2.09	1.89	2.67

Characteristic	All	Primary reason for today's visit: I'm a visitor or on vacation	I work in Del Mar Village	Dining out	Coffee	Shopping	Browsing	Doing errands	Visiting a professional office	I live here	Walking/exercise	Walking on the beach	Walking the dog	Other
Variety of goods and services	2.19	2.27	2.11	2.18	2.00	2.10	2.11	2.03	2.36	1.68	2.00	2.00	2.00	2.26
Quality of goods and services	2.67	2.44	2.48	2.67	2.33	2.71	2.39	2.69	2.36	2.36	2.46	2.58	2.60	2.74
Merchant helpfulness, product knowledge	2.55	2.31	2.50	2.47	2.67	2.46	2.11	2.43	2.43	2.20	2.38	2.67	2.20	2.20
Attractiveness of the buildings	2.60	2.58	2.52	2.66	2.44	2.54	2.50	2.51	2.50	2.28	2.54	2.42	2.40	2.74
Attractiveness of streets, sidewalks	2.60	2.73	2.41	2.63	2.44	2.51	2.56	2.54	2.64	2.20	2.54	2.33	2.80	2.71
Cleanliness	2.73	2.79	2.70	2.76	2.56	2.80	2.61	2.60	2.64	2.16	2.69	2.67	2.40	2.77
Safety	2.79	2.62	2.63	2.84	3.00	2.80	2.78	2.60	2.50	2.48	2.85	2.50	2.80	2.66
Festivals + events	2.53	1.42	2.41	2.36	2.33	2.07	1.94	2.49	2.07	2.28	2.17	1.92	2.20	2.06
Parking availability + convenience	1.74	2.08	1.50	1.68	1.67	1.93	1.72	1.60	1.50	1.52	1.77	1.17	1.60	1.71
Traffic flow	1.81	2.02	1.74	1.85	2.11	1.80	1.78	1.49	1.93	1.48	1.69	1.33	1.60	1.74
Shopping hours	2.23	1.90	2.17	2.09	2.44	2.32	2.11	1.97	2.14	2.16	2.38	1.92	1.80	1.97

	Primary reason for today's visit												
Characteristic	I'm a visitor or on vacation	I work in Del Mar Village	Dining out	Coffee	Shoping	Browsing	Doing errands	Visiting a professional office	I live here	Walking/exercise	Walking on the beach	Walking the dog	Other
Gender													
Female	48%	48%	54%	78%	48%	56%	49%	36%	58%	62%	75%	40%	51%
Male	52%	52%	46%	22%	53%	44%	51%	64%	42%	38%	25%	60%	49%
Age													
<25	12%	15%	26%	-	16%	27%	-	17%	10%	-	17%	-	21%
25-34	10%	19%	26%	11%	11%	27%	11%	25%	5%	8%	17%	-	24%
35-44	33%	11%	21%	22%	18%	13%	23%	17%	24%	-	8%	25%	12%
45-54	22%	30%	17%	44%	18%	20%	20%	17%	19%	25%	8%	25%	29%
55-64	20%	23%	9%	22%	29%	13%	31%	25%	14%	25%	33%	50%	12%
65-74	4%	-	1%	-	8%	-	11%	-	14%	17%	17%	-	3%
75+	-	2%	-	-	-	-	3%	-	14%	25%	-	-	-
Household size													
1 person	12%	13%	15%	11%	25%	22%	20%	-	9%	-	8%	-	17%
2 people	35%	37%	31%	44%	48%	33%	49%	42%	52%	69%	58%	80%	34%
3 people	12%	17%	19%	-	18%	11%	14%	17%	17%	-	-	20%	26%
4 people	25%	24%	21%	33%	5%	22%	14%	33%	9%	23%	25%	-	14%
5 people	16%	9%	14%	11%	5%	11%	3%	8%	13%	8%	8%	-	9%
Household income													
<$70K	19%	29%	21%	-	15%	13%	22%	-	20%	8%	30%	-	30%
>$70K	81%	71%	79%	100%	85%	87%	78%	100%	80%	92%	70%	100%	70%

	Residence			Work place						
	Del Mar Village	Elsewhere in Del Mar	Somewhere other than Del Mar	Del Mar Village	Elsewhere in Del Mar	Somewhere other than Del Mar	I'm retired	I'm a full-time mom/dad/caregiver/ homemaker	I'm a student	I'm not currently employed
Gender										
Female	49%	55%	52%	52%	41%	46%	87%	70%	50%	49%
Male	51%	45%	48%	48%	59%	54%	13%	30%	50%	51%
Age										
<25	7%	16%	18%	13%	13%	-	7%	79%	33%	7%
25-34	-	14%	22%	13%	20%	-	13%	18%	11%	22%
35-44	20%	12%	20%	16%	13%	2%	53%	3%	11%	26%
45-54	25%	22%	21%	29%	23%	9%	13%	-	22%	285
55-64	32%	24%	15%	25%	27%	41%	13%	-	22%	16%
65-74	12%	6%	2%	4%	-	32%	-	-	-	1%
75+	5%	4%	1%	2%	3%	16%	-	-	-	-
Household size										
1 person	12%	13%	15%	14%	13%	12%	7%	13%	-	17%
2 people	49%	38%	39%	40%	42%	73%	7%	18%	30%	40%
3 people	18%	17%	15%	17%	19%	4%	27%	25%	-	16%
4 people	14%	17%	21%	22%	13%	6%	33%	23%	40%	20%
5 people	6%	15%	10%	7%	13%	4%	27%	23%	30%	7%
Household income										
<$70K	9%	19%	24%	20%	26%	21%	7%	66%	14%	12%
>$70K	91%	81%	76%	80%	74%	79%	93%	34%	86%	88%

Characteristic	Survey day						
	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
Gender							
Female	50%	47%	63%	52%	49%	44%	62%
Male	50%	53%	37%	48%	51%	56%	38%
Age							
<25	14%	15%	11%	22%	16%	13%	15%
25-34	20%	16%	3%	17%	23%	19%	15%
35-44	18%	16%	32%	23%	16%	16%	15%
45-54	22%	20%	16%	22%	25%	21%	26%
55-64	20%	27%	22%	13%	10%	24%	22%
65-74	2%	2%	11%	2%	7%	5%	7%
75+	2%	4%	5%	2%	3%	2%	-
Household size							
1 person	13%	16%	13%	15%	16%	16%	10%
2 people	40%	39%	39%	36%	38%	43%	48%
3 people	17%	16%	11%	25%	8%	10%	22%
4 people	21%	21%	24%	10%	25%	24%	10%
5 people	9%	7%	13%	15%	13%	6%	9%
Household income							
<$70K	15%	11%	14%	33%	26%	19%	19%
>$70K	85%	89%	86%	67%	74%	81%	81%

	Survey day																				
	Sunday			Monday			Tuesday			Wednesday			Thursday			Friday			Saturday		
Characteristic	1	2	3	1	2	3	1	2	3	1	2	3	1	2	3	1	2	3	1	2	3
Gender																					
Female	47%	67%	37%	47%	37%	58%	42%	84%	-	53%	52%	53%	55%	32%	63%	42%	56%	32%	44%	75%	65%
Male	53%	33%	63%	53%	63%	42%	58%	16%	-	47%	48%	47%	45%	68%	37%	58%	44%	68%	56%	25%	35%
Age																					
<25	13%	14%	16%	6%	11%	26%	-	22%	-	39%	17%	11%	10%	14%	26%	-	25%	11%	6%	15%	24%
25-34	38%	7%	16%	11%	28%	11%	5%	-	-	-	26%	21%	10%	36%	21%	5%	29%	22%	24%	5%	18%
35-44	13%	14%	26%	17%	17%	16%	37%	28%	-	22%	26%	21%	20%	18%	11%	10%	21%	17%	12%	15%	18%
45-54	25%	21%	21%	22%	33%	5%	21%	11%	-	11%	22%	32%	35%	9%	32%	15%	13%	39%	12%	30%	35%
55-64	13%	29%	21%	39%	11%	32%	26%	17%	-	22%	9%	11%	20%	9%	-	50%	13%	11%	35%	25%	6%
65-74	-	7%	-	-	-	5%	5%	17%	-	6%	-	-	-	9%	11%	15%	-	-	12%	10%	-
75+	-	7%	-	6%	-	5%	5%	6%	-	-	-	5%	5%	5%	-	5%	-	-	-	-	-
Hsld size																					
1 person	-	11%	28%	6%	21%	21%	21%	5%	-	11%	13%	21%	5%	27%	16%	17%	8%	26%	6%	5%	20%
2 people	35%	44%	39%	44%	37%	37%	37%	42%	-	32%	48%	26%	35%	36%	42%	57%	40%	32%	44%	40%	60%
3 people	24%	22%	6%	22%	11%	16%	5%	16%	-	26%	26%	21%	10%	9%	5%	4%	12%	16%	33%	30%	5%
4 people	35%	17%	11%	22%	26%	16%	26%	21%	-	11%	4%	16%	40%	14%	21%	17%	32%	21%	6%	15%	10%
5 people	6%	6%	17%	6%	5%	11%	11%	16%	-	21%	9%	16%	10%	14%	16%	4%	8%	5%	11%	10%	5%
Hsld income																					
<$70K																					
>$70K	94%	83%	78%	93%	93%	81%	89%	83%	-	61%	61%	80%	100%	76%	38%	90%	74%	81%	100%	65%	81%

Survey location	Residence: Del Mar Village	Residence: Elsewhere in Del Mar	Residence: Somewhere other than Del Mar	Work place: Del Mar Village	Work place: Elsewhere in Del Mar	Work place: Somewhere other than Del Mar	Work place: I'm retired	Work place: Full-time mom/dad/caregiver	Work place: I'm a student	Work place: I'm not currently employed
15th + Camino del Mar	19%	19%	62%	13%	9%	48%	13%	4%	11%	2%
13th + Camino del Mar	27%	9%	64%	18%	7%	41%	16%	2%	14%	2%
Camino del Mar between 10th-11th	16%	3%	80%	19%	7%	52%	10%	2%	6%	3%

Characteristic	Where survey participants last bought groceries: Del Mar Village	Flower Hill	Albertson's shopping center	Von's shopping center	Del Mar Highlands	Cedros Design District	UTC	Online or from a catalog	I never buy this	Other place / not listed
Gender										
Female	8%	1%	8%	15%	22%	0%	7%	0%	2%	38%
Male	10%	2%	14%	16%	10%	0%	2%	0%	2%	44%
Residence										
Del Mar Village	20%	0%	24%	28%	20%	0%	0%	0%	0%	8%
Elsewhere in Del Mar	10%	4%	16%	33%	29%	0%	2%	0%	2%	4%
Somewhere other than Del Mar	6%	1%	6%	7%	12%	0%	7%	0%	2%	60%
Primary reason for today's visit										
I'm a visitor or on vacation	16%	0%	5%	14%	2%	0%	2%	0%	0%	60%
I work in Del Mar Village	12%	0%	10%	12%	12%	0%	2%	0%	4%	49%
Dining out	2%	2%	9%	13%	16%	0%	10%	0%	2%	45%
Coffee	0%	0%	0%	22%	44%	0%	0%	0%	0%	33%
Shopping	17%	0%	17%	8%	19%	0%	3%	0%	6%	31%
Browsing	7%	0%	7%	0%	14%	0%	0%	0%	0%	71%
Doing errands	6%	6%	28%	25%	13%	0%	0%	0%	0%	22%
Visiting a professional office	8%	0%	8%	8%	23%	0%	0%	0%	0%	54%
I live here	32%	0%	14%	27%	18%	0%	0%	0%	0%	9%
Walking / exercise	0%	0%	0%	31%	31%	0%	8%	0%	0%	31%
Walking on the beach	0%	0%	11%	22%	44%	0%	0%	0%	0%	22%
Walking the dog	0%	0%	25%	25%	50%	0%	0%	0%	0%	0%
Other	4%	0%	11%	11%	19%	0%	15%	0%	0%	41%

Characteristic	Where survey participants last did banking Del Mar Village	Flower Hill	Albertson's shopping center	Von's shopping center	Del Mar Highlands	Cedros Design District	UTC	Online or from a catalog	I never buy this	Other place / not listed
Gender										
Female	21%	1%	2%	1%	18%	1%	6%	3%	2%	46%
Male	27%	2%	2%	2%	11%	1%	5%	2%	2%	46%
Residence										
Del Mar Village	47%	0%	3%	1%	18%	1%	5%	1%	0%	23%
Elsewhere in Del Mar	38%	4%	2%	2%	30%	0%	2%	2%	6%	14%
Somewhere other than Del Mar	13%	1%	1%	1%	10%	1%	6%	3%	2%	61%
Primary reason for today's visit										
I'm a visitor or on vacation	8%	0%	0%	0%	3%	0%	0%	3%	5%	81%
I work in Del Mar Village	38%	0%	4%	0%	16%	4%	2%	2%	2%	32%
Dining out	13%	2%	0%	2%	16%	0%	11%	2%	1%	51%
Coffee	33%	0%	0%	0%	22%	0%	0%	0%	11%	33%
Shopping	15%	3%	3%	3%	12%	0%	6%	6%	3%	50%
Browsing	7%	0%	0%	0%	7%	0%	0%	13%	7%	67%
Doing errands	53%	0%	3%	0%	20%	0%	3%	0%	0%	20%
Visiting a professional office	31%	0%	8%	0%	8%	0%	0%	0%	0%	54%
I live here	45%	0%	0%	0%	23%	9%	5%	0%	0%	18%
Walking / exercise	42%	0%	0%	0%	17%	0%	8%	0%	0%	33%
Walking on the beach	11%	11%	0%	11%	11%	0%	0%	11%	0%	44%
Walking the dog	50%	0%	0%	0%	50%	0%	0%	0%	0%	0%
Other	4%	4%	4%	4%	15%	0%	11%	0%	0%	59%

Characteristic	Where survey participants last purchased books: Del Mar Village	Flower Hill	Albertson's shopping center	Von's shopping center	Del Mar Highlands	Cedros Design District	UTC	Online or from a catalog	I never buy this	Other place / not listed
Gender										
Female	9%	5%	0%	1%	23%	0%	6%	7%	2%	48%
Male	10%	4%	1%	2%	22%	1%	3%	3%	4%	50%
Residence										
Del Mar Village	19%	6%	0%	1%	42%	1%	3%	7%	0%	19%
Elsewhere in Del Mar	13%	12%	0%	2%	46%	0%	0%	6%	4%	17%
Somewhere other than Del Mar	6%	3%	0%	1%	11%	0%	6%	4%	4%	65%
Primary reason for today's visit										
I'm a visitor or on vacation	8%	0%	0%	0%	3%	0%	3%	6%	3%	78%
I work in Del Mar Village	13%	9%	0%	2%	17%	0%	0%	2%	6%	51%
Dining out	6%	2%	0%	1%	22%	0%	10%	10%	2%	47%
Coffee	0%	0%	0%	0%	33%	0%	0%	11%	11%	44%
Shopping	12%	9%	0%	0%	18%	0%	6%	3%	6%	47%
Browsing	0%	7%	0%	0%	20%	0%	0%	7%	0%	67%
Doing errands	21%	3%	0%	7%	41%	0%	3%	0%	3%	21%
Visiting a professional office	0%	0%	0%	0%	33%	0%	0%	8%	0%	58%
I live here	10%	10%	0%	0%	45%	5%	0%	5%	0%	25%
Walking / exercise	27%	0%	0%	0%	18%	0%	9%	9%	0%	36%
Walking on the beach	10%	20%	0%	0%	20%	0%	0%	0%	0%	50%
Walking the dog	0%	25%	0%	25%	50%	0%	0%	0%	0%	0%
Other	8%	0%	4%	0%	23%	0%	8%	0%	0%	58%

Characteristic	Where survey participants last purchased men's clothing									
	Del Mar Village	Flower Hill	Albertson's shopping center	Von's shopping center	Del Mar Highlands	Cedros Design District	UTC	Online or from a catalog	I never buy this	Other place / not listed
Gender										
Female	4%	1%	1%	0%	0%	2%	24%	4%	12%	53%
Male	11%	1%	0%	0%	1%	0%	26%	3%	3%	54%
Residence										
Del Mar Village	13%	3%	2%	0%	3%	2%	27%	6%	5%	41%
Elsewhere in Del Mar	19%	2%	0%	0%	0%	0%	45%	2%	9%	23%
Somewhere other than Del Mar	4%	0%	0%	0%	0%	1%	20%	3%	8%	63%
Primary reason for today's visit										
I'm a visitor or on vacation	3%	0%	0%	0%	0%	3%	3%	0%	6%	86%
I work in Del Mar Village	4%	0%	0%	0%	2%	0%	25%	0%	19%	50%
Dining out	6%	0%	1%	0%	0%	1%	27%	6%	6%	51%
Coffee	11%	0%	0%	0%	0%	0%	33%	11%	11%	33%
Shopping	6%	6%	0%	0%	3%	0%	21%	3%	6%	55%
Browsing	8%	0%	0%	0%	0%	0%	8%	15%	8%	62%
Doing errands	7%	4%	0%	0%	0%	0%	36%	4%	7%	43%
Visiting a professional office	15%	0%	0%	0%	0%	0%	23%	8%	0%	54%
I live here	19%	0%	0%	0%	0%	5%	38%	5%	0%	33%
Walking / exercise	9%	0%	0%	0%	0%	0%	27%	0%	0%	64%
Walking on the beach	0%	10%	0%	0%	0%	0%	40%	0%	10%	40%
Walking the dog	33%	0%	0%	0%	0%	0%	0%	0%	33%	33%
Other	12%	0%	0%	0%	0%	0%	38%	0%	0%	50%

Characteristic	Where survey participants last purchased women's clothing: Del Mar Village	Flower Hill	Albertson's shopping center	Von's shopping center	Del Mar Highlands	Cedros Design District	UTC	Online or from a catalog	I never buy this	Other place / not listed
Gender										
Female	10%	1%	0%	1%	0%	3%	30%	5%	2%	48%
Male	5%	1%	0%	0%	1%	1%	17%	2%	20%	54%
Residence										
Del Mar Village	10%	0%	0%	0%	2%	3%	25%	5%	14%	41%
Elsewhere in Del Mar	12%	5%	0%	0%	0%	2%	44%	5%	10%	22%
Somewhere other than Del Mar	6%	0%	0%	0%	0%	1%	20%	3%	10%	59%
Primary reason for today's visit										
I'm a visitor or on vacation	11%	0%	0%	3%	0%	3%	3%	3%	0%	78%
I work in Del Mar Village	4%	0%	0%	0%	2%	0%	22%	2%	11%	58%
Dining out	3%	1%	0%	0%	0%	0%	31%	8%	8%	49%
Coffee	0%	0%	0%	0%	0%	13%	38%	0%	13%	38%
Shopping	18%	0%	0%	0%	0%	3%	21%	0%	18%	41%
Browsing	0%	0%	0%	0%	0%	0%	23%	8%	15%	54%
Doing errands	19%	4%	0%	0%	4%	4%	26%	4%	11%	30%
Visiting a professional office	0%	0%	0%	0%	0%	0%	18%	9%	9%	64%
I live here	11%	0%	0%	0%	0%	5%	32%	0%	11%	42%
Walking / exercise	10%	0%	0%	0%	0%	0%	20%	0%	10%	60%
Walking on the beach	8%	8%	0%	0%	0%	0%	50%	8%	0%	25%
Walking the dog	0%	0%	0%	0%	0%	0%	0%	0%	100%	0%
Other	4%	0%	0%	0%	0%	4%	26%	0%	19%	48%

Characteristic	Where survey participants last purchased children's clothing Del Mar Village	Flower Hill	Albertson's shopping center	Von's shopping center	Del Mar Highlands	Cedros Design District	UTC	Online or from a catalog	I never buy this	Other place / not listed
Gender										
Female	4%	1%	0%	1%	1%	2%	20%	3%	22%	46%
Male	5%	1%	0%	1%	1%	0%	16%	3%	22%	53%
Residence										
Del Mar Village	9%	0%	0%	2%	3%	0%	17%	7%	22%	40%
Elsewhere in Del Mar	11%	3%	0%	0%	0%	3%	41%	5%	24%	14%
Somewhere other than Del Mar	2%	1%	0%	0%	0%	1%	15%	1%	21%	58%
Primary reason for today's visit										
I'm a visitor or on vacation	3%	0%	0%	3%	0%	3%	5%	0%	5%	81%
I work in Del Mar Village	10%	0%	0%	0%	3%	0%	10%	3%	28%	48%
Dining out	1%	1%	0%	0%	0%	0%	22%	4%	20%	51%
Coffee	0%	0%	0%	0%	0%	13%	25%	0%	13%	50%
Shopping	3%	0%	0%	3%	3%	0%	19%	0%	26%	45%
Browsing	0%	0%	0%	0%	0%	0%	9%	0%	27%	64%
Doing errands	4%	4%	0%	0%	0%	0%	24%	8%	32%	28%
Visiting a professional office	0%	8%	0%	0%	0%	0%	25%	0%	17%	50%
I live here	17%	0%	0%	0%	0%	0%	33%	11%	22%	17%
Walking / exercise	0%	0%	0%	0%	0%	0%	10%	0%	30%	60%
Walking on the beach	0%	0%	0%	0%	0%	0%	38%	0%	25%	38%
Walking the dog	0%	0%	0%	0%	50%	0%	0%	0%	50%	0%
Other	8%	0%	0%	0%	0%	4%	19%	4%	23%	42%

Characteristic	Where survey participants last purchased electronics (TVs, stereos, music) Del Mar Village	Flower Hill	Albertson's shopping center	Von's shopping center	Del Mar Highlands	Cedros Design District	UTC	Online or from a catalog	I never buy this	Other place / not listed
Gender										
Female	1%	1%	2%	0%	1%	1%	15%	10%	7%	63%
Male	2%	1%	2%	0%	3%	0%	8%	12%	7%	65%
Residence										
Del Mar Village	3%	1%	4%	0%	6%	1%	18%	13%	0%	52%
Elsewhere in Del Mar	0%	4%	2%	0%	0%	0%	21%	21%	13%	38%
Somewhere other than Del Mar	1%	0%	1%	0%	1%	0%	8%	8%	8%	73%
Primary reason for today's visit										
I'm a visitor or on vacation	0%	0%	0%	0%	0%	0%	0%	6%	6%	88%
I work in Del Mar Village	2%	4%	0%	0%	2%	0%	4%	6%	13%	69%
Dining out	0%	0%	1%	0%	1%	0%	19%	11%	4%	64%
Coffee	0%	0%	0%	0%	0%	0%	11%	11%	11%	67%
Shopping	0%	3%	6%	0%	0%	3%	18%	9%	6%	56%
Browsing	0%	0%	0%	0%	0%	0%	7%	7%	14%	71%
Doing errands	0%	0%	7%	0%	7%	0%	14%	17%	14%	41%
Visiting a professional office	8%	8%	0%	0%	0%	0%	0%	15%	0%	69%
I live here	5%	0%	0%	0%	5%	0%	32%	21%	5%	32%
Walking / exercise	0%	0%	9%	0%	0%	0%	0%	9%	9%	73%
Walking on the beach	0%	0%	0%	0%	0%	0%	13%	25%	0%	63%
Walking the dog	0%	0%	0%	0%	0%	0%	0%	33%	0%	67%
Other	4%	0%	0%	0%	4%	0%	13%	8%	0%	71%

Characteristic	Where survey participants last purchased a gift for a friend or family									
	Del Mar Village	Flower Hill	Albertson's shopping center	Von's shopping center	Del Mar Highlands	Cedros Design District	UTC	Online or from a catalog	I never buy this	Other place / not listed
Gender										
Female	13%	4%	0%	0%	5%	7%	18%	6%	1%	46%
Male	18%	5%	0%	0%	1%	3%	13%	9%	1%	51%
Residence										
Del Mar Village	35%	6%	0%	0%	2%	6%	14%	9%	0%	28%
Elsewhere in Del Mar	26%	15%	0%	0%	9%	2%	19%	9%	0%	21%
Somewhere other than Del Mar	7%	1%	0%	0%	3%	5%	15%	7%	1%	60%
Primary reason for today's visit										
I'm a visitor or on vacation	11%	0%	0%	0%	0%	5%	3%	3%	0%	79%
I work in Del Mar Village	22%	4%	0%	0%	0%	4%	7%	9%	2%	52%
Dining out	5%	6%	0%	0%	4%	2%	23%	10%	1%	49%
Coffee	0%	0%	0%	0%	0%	14%	43%	0%	0%	43%
Shopping	28%	3%	0%	0%	3%	6%	9%	9%	3%	38%
Browsing	0%	8%	0%	0%	8%	0%	8%	15%	0%	62%
Doing errands	24%	7%	0%	0%	7%	10%	14%	10%	0%	28%
Visiting a professional office	17%	0%	0%	0%	0%	0%	17%	8%	0%	58%
I live here	32%	11%	0%	0%	0%	5%	21%	5%	0%	26%
Walking / exercise	18%	9%	0%	0%	0%	9%	18%	0%	0%	45%
Walking on the beach	0%	0%	0%	0%	25%	13%	50%	0%	0%	13%
Walking the dog	0%	0%	0%	0%	0%	0%	0%	50%	0%	50%
Other	19%	0%	0%	0%	8%	4%	19%	0%	0%	50%

Characteristic	Where survey participants last purchased greeting cards: Del Mar Village	Flower Hill	Albertson's shopping center	Von's shopping center	Del Mar Highlands	Cedros Design District	UTC	Online or from a catalog	I never buy this	Other place / not listed
Gender										
Female	11%	2%	2%	5%	11%	3%	14%	1%	3%	49%
Male	15%	3%	3%	8%	6%	1%	7%	1%	4%	52%
Residence										
Del Mar Village	27%	3%	9%	8%	9%	2%	12%	2%	3%	26%
Elsewhere in Del Mar	21%	10%	0%	23%	13%	4%	10%	0%	4%	15%
Somewhere other than Del Mar	7%	1%	1%	2%	7%	2%	10%	1%	3%	65%
Primary reason for today's visit										
I'm a visitor or on vacation	0%	0%	0%	0%	3%	3%	3%	3%	3%	86%
I work in Del Mar Village	27%	4%	0%	2%	8%	0%	4%	0%	8%	46%
Dining out	5%	2%	4%	6%	7%	1%	20%	0%	2%	52%
Coffee	0%	0%	0%	0%	25%	13%	13%	0%	0%	50%
Shopping	21%	3%	6%	3%	3%	6%	6%	3%	3%	45%
Browsing	7%	0%	0%	0%	0%	0%	14%	0%	7%	71%
Doing errands	21%	6%	6%	15%	12%	3%	9%	0%	0%	27%
Visiting a professional office	8%	8%	0%	0%	0%	0%	8%	8%	0%	69%
I live here	24%	6%	0%	12%	24%	0%	12%	0%	0%	24%
Walking / exercise	18%	0%	0%	18%	18%	0%	9%	0%	0%	36%
Walking on the beach	0%	0%	0%	22%	33%	11%	22%	0%	0%	11%
Walking the dog	0%	0%	0%	0%	0%	0%	0%	0%	33%	67%
Other	12%	0%	4%	12%	8%	0%	8%	0%	4%	52%

Characteristic	Where survey participants last purchased hair/nail/barber services									
	Del Mar Village	Flower Hill	Albertson's shopping center	Von's shopping center	Del Mar Highlands	Cedros Design District	UTC	Online or from a catalog	I never buy this	Other place / not listed
Gender										
Female	17%	0%	2%	5%	10%	7%	5%	0%	2%	53%
Male	11%	1%	0%	3%	4%	1%	5%	0%	6%	70%
Residence										
Del Mar Village	36%	0%	1%	1%	4%	6%	4%	0%	4%	42%
Elsewhere in Del Mar	29%	2%	2%	7%	16%	2%	4%	0%	7%	31%
Somewhere other than Del Mar	5%	0%	1%	4%	5%	3%	5%	0%	3%	74%
Primary reason for today's visit										
I'm a visitor or on vacation	3%	0%	0%	3%	3%	3%	3%	0%	3%	83%
I work in Del Mar Village	15%	2%	0%	0%	4%	2%	2%	0%	6%	68%
Dining out	6%	0%	1%	2%	9%	7%	9%	0%	1%	64%
Coffee	44%	0%	0%	0%	0%	11%	11%	0%	0%	33%
Shopping	6%	0%	0%	6%	9%	3%	6%	0%	15%	55%
Browsing	0%	0%	0%	0%	7%	7%	0%	0%	7%	80%
Doing errands	34%	0%	3%	3%	3%	3%	0%	0%	0%	52%
Visiting a professional office	20%	0%	0%	0%	10%	0%	0%	0%	0%	70%
I live here	47%	0%	0%	5%	21%	0%	0%	0%	0%	26%
Walking / exercise	30%	0%	0%	10%	0%	0%	0%	0%	0%	60%
Walking on the beach	22%	0%	0%	11%	11%	0%	11%	0%	0%	44%
Walking the dog	67%	0%	0%	0%	0%	0%	0%	0%	33%	0%
Other	0%	0%	8%	12%	4%	0%	12%	0%	0%	64%

Characteristic	Where survey participants last purchased hardware: Del Mar Village	Flower Hill	Albertson's shopping center	Von's shopping center	Del Mar Highlands	Cedros Design District	UTC	Online or from a catalog	I never buy this	Other place / not listed
Gender										
Female	1%	0%	0%	3%	4%	0%	4%	1%	9%	80%
Male	1%	0%	0%	3%	3%	1%	2%	1%	8%	81%
Residence										
Del Mar Village	2%	0%	0%	0%	5%	0%	2%	2%	5%	85%
Elsewhere in Del Mar	0%	0%	0%	7%	13%	0%	4%	0%	15%	61%
Somewhere other than Del Mar	0%	0%	0%	3%	1%	1%	3%	1%	8%	83%
Primary reason for today's visit										
I'm a visitor or on vacation	0%	0%	0%	0%	0%	0%	0%	0%	6%	94%
I work in Del Mar Village	0%	0%	0%	2%	0%	0%	0%	0%	17%	81%
Dining out	0%	0%	0%	4%	1%	3%	8%	1%	9%	74%
Coffee	0%	0%	0%	0%	11%	0%	11%	0%	0%	78%
Shopping	0%	0%	0%	3%	9%	0%	0%	3%	9%	75%
Browsing	0%	0%	0%	0%	0%	0%	0%	0%	13%	87%
Doing errands	3%	0%	0%	0%	7%	0%	0%	3%	3%	83%
Visiting a professional office	0%	0%	0%	15%	0%	0%	8%	0%	0%	77%
I live here	6%	0%	0%	0%	6%	0%	0%	0%	13%	75%
Walking / exercise	0%	0%	0%	0%	10%	0%	0%	0%	10%	80%
Walking on the beach	0%	0%	0%	0%	13%	0%	0%	0%	0%	88%
Walking the dog	0%	0%	0%	0%	33%	0%	0%	0%	0%	67%
Other	0%	0%	0%	8%	0%	0%	4%	0%	0%	88%

Characteristic	Where survey participants last purchased home furnishings (art, dec. items)									
	Del Mar Village	Flower Hill	Albertson's shopping center	Von's shopping center	Del Mar Highlands	Cedros Design District	UTC	Online or from a catalog	I never buy this	Other place / not listed
Gender										
Female	9%	1%	1%	0%	1%	7%	8%	2%	5%	66%
Male	3%	1%	0%	0%	0%	10%	6%	1%	8%	71%
Residence										
Del Mar Village	10%	4%	0%	0%	1%	15%	4%	1%	4%	58%
Elsewhere in Del Mar	7%	0%	2%	0%	0%	7%	19%	0%	12%	52%
Somewhere other than Del Mar	4%	0%	0%	0%	0%	7%	5%	1%	7%	75%
Primary reason for today's visit										
I'm a visitor or on vacation	6%	0%	0%	0%	0%	9%	0%	3%	3%	79%
I work in Del Mar Village	7%	4%	2%	0%	0%	7%	0%	0%	11%	69%
Dining out	3%	1%	1%	0%	0%	9%	13%	1%	8%	65%
Coffee	0%	0%	0%	0%	0%	14%	14%	0%	0%	71%
Shopping	12%	0%	0%	0%	0%	18%	6%	0%	15%	50%
Browsing	0%	0%	0%	0%	0%	0%	7%	7%	7%	80%
Doing errands	13%	0%	0%	0%	0%	3%	7%	0%	7%	70%
Visiting a professional office	0%	0%	0%	0%	0%	0%	8%	0%	0%	92%
I live here	6%	6%	0%	0%	6%	25%	6%	6%	0%	44%
Walking / exercise	18%	0%	0%	0%	0%	0%	9%	0%	0%	73%
Walking on the beach	0%	0%	0%	0%	0%	13%	0%	0%	0%	88%
Walking the dog	0%	0%	0%	0%	0%	25%	0%	0%	25%	50%
Other	4%	0%	0%	0%	0%	0%	12%	0%	4%	80%

Characteristic	Del Mar Village	Flower Hill	Albertson's shopping center	Von's shopping center	Del Mar Highlands	Cedros Design District	UTC	Online or from a catalog	I never buy this	Other place / not listed
	Where survey participants last purchased home furnishings (furn., antiques)									
Gender										
Female	6%	1%	0%	0%	1%	10%	6%	2%	7%	67%
Male	1%	0%	0%	0%	0%	9%	6%	2%	8%	74%
Residence										
Del Mar Village	8%	2%	0%	0%	2%	15%	5%	6%	3%	61%
Elsewhere in Del Mar	2%	2%	0%	0%	0%	17%	17%	0%	12%	50%
Somewhere other than Del Mar	2%	0%	0%	0%	0%	7%	4%	1%	9%	78%
Primary reason for today's visit										
I'm a visitor or on vacation	0%	6%	3%	0%	6%	0%	0%	0%	20%	0%
I work in Del Mar Village	0%	0%	3%	0%	0%	0%	0%	0%	0%	0%
Dining out	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Coffee	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Shopping	0%	0%	0%	0%	0%	0%	0%	0%	7%	0%
Browsing	9%	10%	11%	13%	15%	0%	17%	0%	20%	0%
Doing errands	0%	0%	8%	25%	6%	7%	7%	8%	0%	0%
Visiting a professional office	3%	0%	3%	0%	3%	0%	0%	0%	13%	0%
I live here	3%	15%	8%	0%	9%	7%	7%	0%	0%	9%
Walking / exercise	84%	69%	66%	63%	61%	86%	70%	92%	40%	91%
Walking on the beach	0%	6%	3%	0%	6%	0%	0%	0%	20%	0%
Walking the dog	0%	0%	3%	0%	0%	0%	0%	0%	0%	0%
Other	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%

Characteristic	Where survey participants last purchased home furnishings (kitchen, bath)									
	Del Mar Village	Flower Hill	Albertson's shopping center	Von's shopping center	Del Mar Highlands	Cedros Design District	UTC	Online or from a catalog	I never buy this	Other place / not listed
Gender										
Female	2%	1%	1%	2%	2%	2%	8%	2%	7%	74%
Male	0%	1%	1%	1%	3%	5%	8%	1%	7%	74%
Residence										
Del Mar Village	2%	5%	2%	0%	5%	3%	5%	2%	5%	73%
Elsewhere in Del Mar	2%	0%	2%	5%	2%	7%	19%	2%	10%	50%
Somewhere other than Del Mar	0%	0%	0%	1%	2%	3%	7%	1%	7%	78%
Primary reason for today's visit										
I'm a visitor or on vacation	0%	0%	0%	0%	0%	6%	3%	3%	3%	85%
I work in Del Mar Village	0%	0%	0%	0%	5%	0%	2%	2%	11%	80%
Dining out	3%	1%	0%	3%	3%	5%	6%	3%	6%	71%
Coffee	0%	0%	0%	0%	0%	13%	25%	0%	0%	63%
Shopping	0%	0%	6%	0%	0%	6%	6%	0%	13%	69%
Browsing	0%	0%	0%	0%	7%	0%	7%	0%	7%	79%
Doing errands	0%	0%	0%	3%	3%	7%	10%	0%	7%	70%
Visiting a professional office	0%	0%	0%	0%	0%	0%	8%	0%	8%	83%
I live here	7%	7%	0%	7%	7%	0%	20%	0%	0%	53%
Walking / exercise	0%	10%	0%	0%	0%	10%	0%	0%	0%	80%
Walking on the beach	0%	0%	0%	0%	0%	0%	22%	0%	0%	78%
Walking the dog	0%	0%	0%	0%	0%	0%	0%	0%	33%	67%
Other	0%	0%	0%	0%	4%	0%	16%	0%	8%	72%

Characteristic	Where survey participants last saw a movie in a theatre									
	Del Mar Village	Flower Hill	Albertson's shopping center	Von's shopping center	Del Mar Highlands	Cedros Design District	UTC	Online or from a catalog	I never buy this	Other place / not listed
Gender										
Female	2%	23%	1%	2%	18%	1%	6%	0%	3%	46%
Male	1%	26%	1%	1%	17%	0%	2%	0%	4%	48%
Residence										
Del Mar Village	1%	50%	0%	0%	24%	0%	1%	0%	3%	21%
Elsewhere in Del Mar	2%	31%	2%	0%	33%	2%	6%	0%	10%	14%
Somewhere other than Del Mar	1%	15%	0%	2%	12%	0%	5%	0%	2%	63%
Primary reason for today's visit										
I'm a visitor or on vacation	0%	12%	0%	0%	3%	0%	3%	0%	9%	74%
I work in Del Mar Village	2%	21%	0%	0%	21%	2%	2%	0%	2%	50%
Dining out	0%	18%	0%	1%	21%	0%	6%	0%	4%	50%
Coffee	0%	22%	0%	0%	44%	0%	11%	0%	0%	22%
Shopping	3%	29%	0%	0%	23%	0%	9%	0%	3%	34%
Browsing	7%	7%	0%	0%	20%	0%	7%	0%	0%	60%
Doing errands	3%	45%	0%	6%	6%	0%	3%	0%	3%	32%
Visiting a professional office	0%	8%	0%	0%	23%	0%	0%	0%	0%	69%
I live here	5%	58%	0%	0%	16%	0%	0%	0%	0%	21%
Walking / exercise	0%	40%	0%	0%	10%	0%	0%	0%	0%	50%
Walking on the beach	0%	45%	0%	9%	27%	0%	0%	0%	0%	18%
Walking the dog	0%	75%	0%	0%	0%	0%	0%	0%	25%	0%
Other	0%	12%	8%	0%	15%	0%	4%	0%	4%	58%

Characteristic	Where survey participants last purchased pharmacy + personal care items									
	Del Mar Village	Flower Hill	Albertson's shopping center	Von's shopping center	Del Mar Highlands	Cedros Design District	UTC	Online or from a catalog	I never buy this	Other place / not listed
Gender										
Female	2%	3%	6%	18%	14%	1%	3%	1%	2%	51%
Male	2%	2%	5%	17%	13%	1%	5%	0%	1%	54%
Residence										
Del Mar Village	3%	3%	6%	18%	14%	1%	1%	2%	3%	49%
Elsewhere in Del Mar	3%	4%	9%	38%	21%	0%	0%	1%	1%	22%
Somewhere other than Del Mar										
Primary reason for today's visit										
I'm a visitor or on vacation	9%	3%	3%	3%	6%	0%	0%	3%	0%	74%
I work in Del Mar Village	0%	4%	4%	13%	21%	2%	2%	2%	2%	50%
Dining out	0%	5%	6%	14%	11%	0%	6%	0%	3%	55%
Coffee	0%	0%	0%	38%	0%	0%	25%	0%	0%	38%
Shopping	3%	0%	3%	20%	10%	0%	0%	3%	10%	50%
Browsing	7%	7%	0%	0%	0%	7%	0%	0%	0%	80%
Doing errands	0%	3%	13%	33%	20%	0%	0%	0%	0%	30%
Visiting a professional office	9%	0%	9%	0%	27%	0%	0%	0%	0%	55%
I live here	5%	0%	11%	47%	16%	0%	0%	0%	0%	21%
Walking / exercise	0%	0%	0%	42%	8%	0%	0%	0%	0%	50%
Walking on the beach	0%	0%	0%	22%	33%	0%	0%	0%	0%	44%
Walking the dog	0%	0%	0%	67%	33%	0%	0%	0%	0%	0%
Other	0%	0%	12%	8%	15%	0%	8%	0%	0%	58%

Characteristic	Where survey participants last purchased recorded music: Del Mar Village	Flower Hill	Albertson's shopping center	Von's shopping center	Del Mar Highlands	Cedros Design District	UTC	Online or from a catalog	I never buy this	Other place / not listed
Gender										
Female	1%	1%	0%	1%	10%	0%	6%	18%	8%	56%
Male	1%	2%	1%	0%	8%	0%	4%	17%	9%	58%
Residence										
Del Mar Village	3%	0%	0%	0%	20%	0%	3%	25%	11%	38%
Elsewhere in Del Mar	2%	2%	0%	0%	17%	0%	7%	27%	20%	24%
Somewhere other than Del Mar	0%	2%	1%	1%	4%	0%	5%	13%	6%	70%
Primary reason for today's visit										
I'm a visitor or on vacation	0%	0%	0%	0%	0%	0%	0%	13%	6%	81%
I work in Del Mar Village	2%	2%	0%	0%	13%	0%	0%	13%	9%	60%
Dining out	0%	1%	0%	0%	5%	0%	10%	19%	4%	61%
Coffee	0%	0%	0%	0%	14%	0%	29%	14%	0%	43%
Shopping	0%	4%	0%	0%	11%	0%	4%	14%	21%	46%
Browsing	0%	0%	0%	0%	7%	0%	0%	14%	0%	79%
Doing errands	0%	4%	4%	0%	12%	0%	4%	19%	15%	42%
Visiting a professional office	0%	0%	0%	0%	18%	0%	0%	18%	0%	64%
I live here	12%	0%	0%	6%	6%	0%	6%	41%	6%	24%
Walking / exercise	0%	0%	0%	0%	0%	0%	0%	30%	20%	50%
Walking on the beach	0%	0%	0%	0%	11%	0%	11%	22%	11%	44%
Walking the dog	0%	0%	0%	0%	33%	0%	0%	33%	33%	0%
Other	0%	0%	0%	0%	20%	0%	4%	4%	12%	60%

Characteristic	Where survey participants last dined in a restaurant (everyday dining)									
	Del Mar Village	Flower Hill	Albertson's shopping center	Von's shopping center	Del Mar Highlands	Cedros Design District	UTC	Online or from a catalog	I never buy this	Other place / not listed
Gender										
Female	36%	4%	0%	1%	8%	1%	3%	0%	1%	46%
Male	42%	3%	1%	2%	2%	0%	3%	1%	1%	45%
Residence										
Del Mar Village	67%	4%	0%	4%	1%	0%	0%	1%	0%	21%
Elsewhere in Del Mar	44%	7%	2%	2%	13%	0%	4%	0%	2%	24%
Somewhere other than Del Mar	29%	3%	0%	0%	4%	0%	4%	0%	1%	57%
Primary reason for today's visit										
I'm a visitor or on vacation	33%	0%	0%	3%	3%	0%	3%	0%	0%	59%
I work in Del Mar Village	49%	2%	0%	2%	4%	0%	2%	0%	0%	40%
Dining out	34%	4%	0%	1%	5%	0%	4%	0%	2%	51%
Coffee	33%	0%	0%	0%	22%	0%	0%	0%	0%	44%
Shopping	38%	13%	0%	3%	0%	0%	3%	3%	0%	41%
Browsing	13%	0%	0%	0%	0%	0%	13%	0%	7%	67%
Doing errands	45%	10%	3%	0%	3%	3%	0%	0%	3%	32%
Visiting a professional office	31%	0%	8%	0%	15%	0%	0%	0%	0%	46%
I live here	65%	5%	0%	0%	0%	0%	5%	0%	0%	25%
Walking / exercise	58%	0%	0%	8%	8%	0%	0%	0%	0%	25%
Walking on the beach	50%	0%	0%	0%	13%	0%	0%	0%	0%	38%
Walking the dog	67%	0%	0%	0%	0%	0%	0%	0%	0%	33%
Other	26%	0%	0%	0%	11%	0%	7%	0%	0%	56%

Characteristic	Where survey participants last dined in a restaurant (fine dining)									
	Del Mar Village	Flower Hill	Albertson's shopping center	Von's shopping center	Del Mar Highlands	Cedros Design District	UTC	Online or from a catalog	I never buy this	Other place / not listed
Gender										
Female	38%	2%	0%	1%	2%	1%	2%	0%	2%	51%
Male	45%	1%	1%	1%	1%	0%	1%	0%	1%	50%
Residence										
Del Mar Village	74%	3%	0%	0%	0%	0%	0%	0%	0%	23%
Elsewhere in Del Mar	53%	0%	0%	0%	2%	2%	2%	0%	7%	33%
Somewhere other than Del Mar	28%	1%	0%	1%	2%	0%	2%	0%	1%	63%
Primary reason for today's visit										
I'm a visitor or on vacation	44%	0%	0%	2%	2%	0%	2%	0%	0%	49%
I work in Del Mar Village	47%	0%	0%	0%	0%	0%	2%	0%	0%	51%
Dining out	32%	3%	0%	1%	1%	0%	1%	0%	4%	58%
Coffee	50%	0%	0%	0%	13%	0%	0%	0%	0%	38%
Shopping	52%	3%	0%	0%	0%	6%	3%	0%	0%	36%
Browsing	27%	0%	0%	0%	0%	0%	0%	0%	0%	73%
Doing errands	45%	3%	3%	0%	3%	0%	0%	0%	6%	39%
Visiting a professional office	38%	0%	0%	0%	0%	0%	0%	0%	0%	62%
I live here	68%	0%	0%	0%	0%	0%	0%	0%	0%	32%
Walking / exercise	42%	0%	0%	0%	0%	0%	0%	0%	0%	58%
Walking on the beach	33%	0%	0%	11%	0%	0%	0%	0%	0%	56%
Walking the dog	75%	25%	0%	0%	0%	0%	0%	0%	0%	0%
Other	20%	0%	0%	0%	4%	0%	8%	0%	0%	68%

Characteristic	Where survey participants last dined in a restaurant (fast food, carryout)									
	Del Mar Village	Flower Hill	Albertson's shopping center	Von's shopping center	Del Mar Highlands	Cedros Design District	UTC	Online or from a catalog	I never buy this	Other place / not listed
Gender										
Female	18%	1%	2%	1%	15%	1%	3%	0%	3%	55%
Male	19%	3%	3%	4%	10%	0%	4%	0%	4%	53%
Residence										
Del Mar Village	25%	2%	2%	2%	16%	0%	3%	0%	3%	48%
Elsewhere in Del Mar	16%	2%	5%	11%	30%	0%	7%	0%	5%	25%
Somewhere other than Del Mar	17%	2%	2%	1%	8%	0%	4%	0%	4%	61%
Primary reason for today's visit										
I'm a visitor or on vacation	37%	0%	0%	0%	3%	0%	0%	0%	0%	61%
I work in Del Mar Village	22%	2%	0%	2%	18%	0%	2%	0%	9%	44%
Dining out	12%	2%	2%	1%	9%	0%	6%	0%	2%	64%
Coffee	13%	0%	0%	13%	38%	0%	0%	0%	0%	38%
Shopping	18%	6%	0%	0%	18%	0%	3%	0%	12%	44%
Browsing	7%	0%	0%	0%	7%	0%	7%	0%	0%	80%
Doing errands	7%	0%	14%	7%	7%	0%	7%	0%	0%	57%
Visiting a professional office	17%	0%	0%	0%	25%	0%	0%	0%	8%	50%
I live here	25%	6%	0%	13%	13%	6%	6%	0%	0%	31%
Walking / exercise	20%	0%	0%	0%	10%	0%	0%	0%	0%	70%
Walking on the beach	20%	10%	0%	10%	20%	0%	0%	0%	0%	40%
Walking the dog	33%	0%	0%	0%	33%	0%	0%	0%	0%	33%
Other	18%	0%	7%	4%	11%	0%	7%	0%	7%	46%

Characteristic	Where survey participants last purchased sports equip., clothing, supplies									
	Del Mar Village	Flower Hill	Albertson's shopping center	Von's shopping center	Del Mar Highlands	Cedros Design District	UTC	Online or from a catalog	I never buy this	Other place / not listed
Gender										
Female	2%	1%	1%	0%	1%	0%	8%	3%	4%	81%
Male	1%	1%	1%	0%	1%	1%	8%	6%	7%	73%
Residence										
Del Mar Village	2%	2%	3%	0%	0%	3%	11%	6%	5%	69%
Elsewhere in Del Mar	5%	0%	0%	0%	2%	0%	14%	7%	12%	60%
Somewhere other than Del Mar	1%	0%	0%	0%	0%	0%	6%	4%	5%	83%
Primary reason for today's visit										
I'm a visitor or on vacation	0%	3%	0%	0%	0%	0%	0%	3%	0%	94%
I work in Del Mar Village	0%	2%	0%	0%	0%	0%	2%	2%	11%	83%
Dining out	1%	0%	3%	0%	1%	0%	13%	9%	4%	69%
Coffee	0%	0%	0%	0%	11%	0%	22%	0%	0%	67%
Shopping	3%	0%	0%	0%	0%	0%	13%	3%	9%	72%
Browsing	0%	0%	0%	0%	0%	0%	7%	7%	0%	87%
Doing errands	7%	0%	0%	0%	0%	0%	7%	4%	14%	68%
Visiting a professional office	0%	0%	0%	0%	0%	0%	8%	8%	0%	83%
I live here	6%	0%	6%	0%	0%	0%	19%	6%	0%	63%
Walking / exercise	0%	0%	0%	0%	0%	9%	9%	0%	9%	73%
Walking on the beach	0%	0%	0%	0%	0%	0%	0%	0%	13%	88%
Walking the dog	0%	0%	0%	0%	0%	33%	0%	0%	33%	33%
Other	0%	0%	0%	0%	0%	0%	4%	4%	0%	92%

Characteristic	Where survey participants last purchased toys and games: Del Mar Village	Flower Hill	Albertson's shopping center	Von's shopping center	Del Mar Highlands	Cedros Design District	UTC	Online or from a catalog	I never buy this	Other place / not listed
Gender										
Female	2%	7%	1%	1%	4%	1%	8%	4%	17%	56%
Male	2%	3%	0%	1%	4%	1%	6%	4%	13%	67%
Residence										
Del Mar Village	5%	15%	0%	2%	2%	2%	8%	7%	18%	42%
Elsewhere in Del Mar	2%	7%	2%	0%	7%	2%	12%	7%	21%	40%
Somewhere other than Del Mar	1%	1%	0%	0%	4%	0%	6%	3%	13%	71%
Primary reason for today's visit										
I'm a visitor or on vacation	3%	3%	0%	0%	0%	0%	0%	3%	6%	85%
I work in Del Mar Village	0%	2%	0%	0%	4%	0%	2%	2%	22%	67%
Dining out	1%	4%	1%	0%	6%	0%	9%	8%	12%	59%
Coffee	0%	11%	0%	0%	11%	11%	22%	11%	0%	33%
Shopping	3%	6%	0%	0%	6%	3%	3%	3%	23%	52%
Browsing	0%	0%	0%	0%	0%	0%	7%	0%	13%	80%
Doing errands	4%	11%	0%	4%	0%	0%	14%	0%	14%	54%
Visiting a professional office	0%	0%	0%	0%	0%	8%	15%	8%	0%	69%
I live here	19%	6%	0%	6%	0%	0%	0%	13%	19%	38%
Walking / exercise	0%	10%	0%	0%	10%	0%	0%	0%	20%	60%
Walking on the beach	0%	0%	0%	0%	13%	0%	13%	0%	13%	63%
Walking the dog	0%	0%	0%	0%	0%	0%	0%	0%	100%	0%
Other	0%	9%	0%	0%	0%	0%	13%	0%	17%	61%

Characteristic	Where survey participants last rented videos: Del Mar Village	Flower Hill	Albertson's shopping center	Von's shopping center	Del Mar Highlands	Cedros Design District	UTC	Online or from a catalog	I never buy this	Other place / not listed
Gender										
Female	3%	0%	1%	1%	21%	0%	2%	7%	13%	52%
Male	2%	0%	3%	3%	12%	1%	2%	9%	12%	56%
Residence										
Del Mar Village	5%	0%	3%	7%	23%	2%	2%	20%	15%	23%
Elsewhere in Del Mar	5%	0%	5%	2%	35%	0%	5%	9%	14%	26%
Somewhere other than Del Mar	1%	0%	1%	1%	11%	0%	2%	5%	11%	68%
Primary reason for today's visit										
I'm a visitor or on vacation	6%	0%	0%	0%	6%	0%	0%	3%	3%	82%
I work in Del Mar Village	2%	0%	2%	2%	9%	0%	2%	7%	11%	65%
Dining out	1%	0%	1%	1%	20%	0%	5%	8%	13%	51%
Coffee	0%	0%	0%	11%	33%	0%	0%	11%	0%	44%
Shopping	3%	0%	3%	0%	24%	3%	3%	0%	18%	45%
Browsing	0%	0%	7%	0%	13%	0%	0%	0%	20%	60%
Doing errands	3%	0%	0%	7%	14%	0%	0%	17%	14%	45%
Visiting a professional office	0%	0%	0%	0%	9%	0%	0%	9%	18%	64%
I live here	6%	0%	0%	0%	24%	0%	0%	18%	18%	35%
Walking / exercise	0%	0%	0%	9%	0%	0%	0%	45%	0%	45%
Walking on the beach	0%	0%	0%	0%	44%	0%	0%	0%	11%	44%
Walking the dog	0%	0%	0%	0%	50%	0%	0%	0%	50%	0%
Other	4%	0%	8%	4%	12%	0%	4%	4%	12%	54%