NEW ECONOMICS & ADVISORY®

LAND USE ANALYSIS & STRATEGIES

MEMORANDUM

To: **Ardie Zahedani and Jay Coles**

From: Isabel Domeyko and Jesse Walker

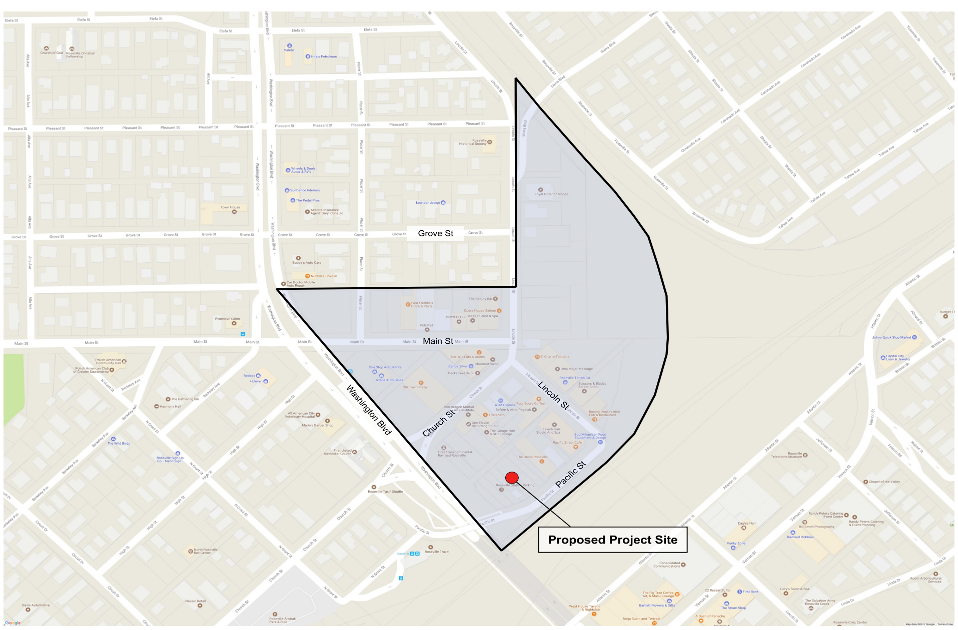
Date: February 15, 2018

Re: Junction Crossings Impact on Historic Old Town Business District

St. Anton Communities is proposing to develop a workforce housing project in the Historic Old Town Roseville (HOT) Business District. The Junction Crossings development (Project) proposes to construct 80 units of affordable housing at the site of an existing public parking lot at the northern corner of Washington and Pacific Streets. **Figure 1** shows the location of the Proposed Project, the HOT Business District, and the surrounding area.

The City has requested an analysis of the Project's economic effects on retail businesses in the HOT Business District. New Economics & Advisory has researched this issue with a specific focus on retail spending potential created by Project residents, as well as changes in parking as a result of the Project. This memorandum summarizes the results of this research.

1 ***Map of Historic Old Town (HOT) Business District Project Area***
Junction Crossings



Study Parameters

The study estimates two types of economic impacts of the Proposed Project on local retail business activities. First, Project residents will spend money on retail goods and services, a portion of which will be captured by local businesses. Second, changes to the number of available public parking spaces in the Business District portion of HOT may affect retail business activities. At the City's request, the parking component of the analysis considers two parking scenarios:

- **Project Scenario**, which includes the development of the Project alone, and results in a net loss of 11 public parking spaces. The existing site has been determined to possess 50 spaces currently, including 38 striped spaces and room for an additional 12 vehicles to park on unpaved, unstriped locations.[1] Once the Project is constructed, 39 reconfigured public parking spaces will be provided, resulting in a net loss of 11 spaces from current conditions.
- **Near-Term Scenario**, which includes the development of the Project, another housing project (Pacific Plaza), and the addition of Phase 1 of the City's Third Track rail project. This scenario presumes that the City would construct an additional public parking lot in the Business District, resulting in a net addition of 50 new spaces in the area, based on the Historic Old Town Roseville Parking Study, prepared by Fehr and Peers.

Summary of Findings

The findings below encapsulate the key conclusions and insights into the Project's impacts on local retailers. **Figure 2** summarizes the quantifiable results of Project resident spending and **Figure 3** summarizes the potential parking implications under the two scenarios analyzed. **Appendix A** contains supporting calculations utilized to derive the results.

- **Finding 1: Existing retailers in the Business District portion of HOT are predominantly clustered around Eating and Drinking Establishments and personal services (e.g. salons).** Of the approximately 50 businesses in HOT, at least 6 businesses are restaurants, and at least 5 are salons/barber shops. The number of new retail businesses appears to be growing, and a review of taxable sales data provided by the City indicate that overall retail sales within the OTR have been steadily increasing over the last 5 years.

[1] The existing and future project parking quantities were provided by St. Anton Communities and the City of Roseville. The quantity of existing spaces at the Project site (50) differs slightly from the 51 spaces shown in the Historic Old Town Roseville Parking study, prepared by Fehr and Peers. The parking quantities used in this analysis are based on updated figures provided by the Alta Parking Survey and through discussions with the City of Roseville.

- **Finding 2: Non-retail businesses in the Business District portion of HOT include insurance firms, non-profit organizations, and other miscellaneous businesses.** For some of these entities, a significant portion of business is conducted on-line and via email, but qualitative feedback obtained from business representatives indicates that parking for employees is challenging both during traditional business hours and on holidays. However, this analysis focuses predominantly on retail businesses.
- **Finding 3: The Proposed Project includes 80 units of workforce housing, at which residents' housing costs will be limited to account for no more than 30 percent of total household income. Because of this cap, occupants are expected to have a proportionately higher share of disposable income available for spending on retail goods and services. Some of this spending will occur at retail businesses in the Business District portion of HOT.** As a point of comparison, the average household in the U.S. spends 33 percent of annual income on housing expenses (according to the Bureau of Labor Statistics), and between 34 and 36 percent of Low- and Very-Low Income Households in Placer County spend more than 30% of their total income on housing expenses, according to the City's Housing Element.
- **Finding 4: Project households could spend approximately \$19,500 per year on retail goods at "brick and mortar" establishments. Based on current spending levels and a plausible range of potential capture, the Project would inject approximately \$59,850 to \$139,750 in new resident spending annually in Old Town, which represents approximately 1.2 to 2.9 percent of the Business District's current annual sales.** It should be noted that this amount is conservative in that it does not include any potential spending from the visitors of Project residents or other "spin-off" activity, which could add to the overall spending impacts of the Project. It is additionally conservative because other parts of HOT have retail businesses that could reasonably capture expenditures made by Project residents.
- **Finding 5: A lack of available parking has been identified by local businesses as a constraint to their revenue attainment, with the most impacted periods being on Friday and Saturday evenings. By estimating current estimated total annual sales in the district, adjusted to include only the periods of limited availability, each publicly-available parking space has an annual value to the district of approximately \$5,400. Figure 3** shows the detailed assumptions and calculations that support this calculation.
- **Finding 6: The Project's removal of 11 net public parking spaces in the HOT Business District could result in a negative impact of \$59,000 in annual sales for local retailers.** This amount could be fully-mitigated by the spending of Project residents (as described in Finding 4 above).
- **Finding 7: Once the Third Rail Project is constructed (and the associated parking described under the Near-Term Scenario above), an additional 50 net public parking spaces will be added to the Business District. These additional spaces provide the potential for \$270,000 in additional local retail sales.**

2 *Estimated Spending from New Project Residents in HOT Business District*
Junction Crossings

Item	LOW RANGE: Annual Spending Per Project Household Captured in HOT Business District [1]	LOW RANGE: Total Annual Amount in HOT Business District	HIGH RANGE: Annual Spending Per Project Household Captured in HOT Business District [1]	HIGH RANGE: Total Annual Amount in HOT Business District
Project Households		80		80
<u>Retail Expenditures</u>				
Food				
Food away from home	$438	$35,052	$1,314	$105,155
Alcoholic beverages	$61	$4,899	$184	$14,697
Entertainment	$100	$8,005	$100	$8,005
Personal care products and services	$111	$8,872	$111	$8,872
Reading	$0	$0	$0	$0
Tobacco products and smoking supplies	$38	$3,022	$38	$3,022
Subtotal Retail Expenditures	**$748**	**$59,850**	**$1,747**	**$139,752**
Total HOT Business District Sales [2]		**$4,864,000**		**$4,864,000**
Percentage Increase from Project Household Spending		**1.2%**		**2.9%**

[1] See backup information in Figure 4.
[2] Total business district sales estimated based on taxable sales data provided by the City, adjusted to account for non-taxable sales by New Economics.
Source: Bureau of Labor Statistics, Consumer Expenditure Survey, Table 1110, 2016.
Prepared by New Economics & Advisory, February 2018.

3 Net Parking Impacts
Junction Crossings

Item	Source	Junction Crossings	3 Projects
Net Spaces	See Figure A-2	-11	50
Annual Weekend Retail Sales Per Parking Space	See Figure 5	$5,400	$5,400
Net Annual Value of Parking		**($59,000)**	**$270,000**
Estimated Retail Sales in HOT Business District	See Footnote [1]	***$4,864,000***	***$4,864,000***
Parking Impacts as a % of Total		***-1.2%***	***5.6%***

[1] Total business district sales estimated based on taxable sales data provided by the City, adjusted to account for non-taxable sales by New Economics.
Sources: Fehr & Peers, Historic Old Town Roseville Parking Study Memorandum, September 26, 2017, Alta Parking Survey, City of Roseville taxable sales data, interviews with local business representatives, and New Economics.
Prepared by New Economics & Advisory, February 2018.

Methodology and Key Assumptions

New Economics analyzed the current business activity and parking dynamics in the HOT Business District in order to assess how the addition of 80 new Project households and varying numbers of public parking spaces would affect the area. The analytical techniques, data sources, assumptions, and other critical information used in the Analysis are described below, and the attached **Appendix A** includes the various maps, figures, and tables which display the technical data, calculations, and results used in this Analysis.

Spending Impacts – Methodology, Data, and Assumptions

New Economics analyzed the future spending of Project households by assessing the projected household income limits, and adjusting them to account for the smaller proportion that would be spent on housing costs, leaving additional income available for other purposes. New Economics has estimated that each household in the Project will spend an average of approximately $19,500 per year on retail goods and services at “brick and mortar” retail.

Next, New Economics assessed the potential capture in the HOT Business District, by retail category. Since only certain retail categories are available to be purchased in the district, only the Food Away From Home, Alcoholic Beverages, Entertainment, Personal Care Product/ Services, and Tobacco categories were applied capture rates shown in **Figure 4**. Since Food Away From Home and Alcoholic Beverages represent relatively large proportions of spending, and since there are several options in Business District of HOT for Project residents to spend in these categories we applied high-end and low-end capture rates, ranging from 20% to 60%.

Based on these capture rates, it is estimated that Project households will spend approximately $750 to $1,750 per year in the HOT Business District. This per-household amount was then applied to the total 80 units planned for the Project to arrive at a total of approximately $59,850 to $139,750 spent annually in the HOT Business District by Project households. This amount was compared to the total estimated retail sales in the entire HOT district, which was estimated by analyzing taxable sales data for HOT and applying taxable percentage assumptions to arrive at total estimated sales. These calculations are documented in **Figure 2**, which shows that the spending from Project households will increase current sales by approximately 1.2 to 2.9 percent.

Parking Impacts – Methodology, Data, and Assumptions

Business representatives interviewed as part of this analysis have expressed concern over the lack of available parking in the Business District of HOT. In order to assess the impact of changing parking dynamics as the result of the Project and the Near-Term Scenario described above, New Economics has estimated a value of each available parking space, based on the vehicle-based sales activity in the district. The methodology utilized was adapted from the National Main Street Center of the National Trust for Historic Preservation, and involves quantifying the total annual sales in the district, deducting sales that occur to those who walk, take transit, or otherwise arrive in the district through some method other than driving a personal vehicle, which is then spread to the number of spaces in the district. The assumptions used in these calculations were informed by interviews conducted with local restaurant businesses, which are summarized in **Figure 5**.

As shown, New Economics has estimated that the vehicle-related sales in the Business District of HOT are approximately $4.2 million per year, and that 54%, or $2.3 million, occurs during “peak” periods (weekend nights) when parking is most heavily-impacted. On a per-parking-space basis, this parking-impacted annual spending equals approximately $5,400 per space.[2]

Thus, when a parking space is removed or added to the district, a corresponding negative or positive value of $5,400 per space can be applied. **Figure 3** (above) shows that the Project alone will produce a net reduction in 11 public parking spaces, accounting for $59,000 in lost annual retail sales. Even so, this impact may be fully-mitigated by the $59,850 to $139,750 positive impact that Project residents will bring to the HOT Business District (as illustrated in **Figure 2** above). When the Near-Term Scenario comes to fruition, a net of 50 additional parking spaces will be added to the district, accounting for a potential increase in annual sales of approximately $270,000.

[2] This calculation assumes an 80% occupancy rate, which assumes that 20% of parking spaces are available at any given time, even during “peak” periods.

4 *Estimated Project Household Expenditures Captured by HOT Business District Retailers*

Junction Crossings

	Fourth Decile [1]		Project Household Spending		Portion Spent at Brick and Mortar Retail [2]		# of Businesses in HOT Business District [3]	HOT Business District Capture LOW RANGE		HOT Business District Capture HIGH RANGE	
Item	% of Income	Amount	% of Income	Amount	%	Amount		Assumed Capture [4]	Amount	Assumed Capture [4]	Amount
Annual Income Before Taxes		$33,499		$35,640 [5]							
Housing Expenses	36%	$12,160	30%	$10,020 [5]							
Retail Expenses	53%	$17,890	59%	$20,916							
Other Expenses	10%	$3,449	11%	$4,032							
Total Expenses	100%	$33,499	100%	$4,032							
Retail Expenditures											
Food	16%	$5,218	17%	$6,101	90%	$5,490					
Food at home	9%	$3,136	10%	$3,666	90%	$3,300	0	0%	$0	0%	$0
Food away from home	6%	$2,082	7%	$2,434	90%	$2,191	6	20%	$438	60%	$1,314
Alcoholic beverages	1%	$291	1%	$340	90%	$306	8	20%	$61	60%	$184
Household operations	5%	$1,790	6%	$2,093	90%	$1,883					
Housekeeping supplies	2%	$568	2%	$664	90%	$598	0	0%	$0	0%	$0
Household furnishings and equipment	4%	$1,222	4%	$1,429	90%	$1,286	0	0%	$0	0%	$0
Apparel and services	4%	$1,233	4%	$1,442	90%	$1,297	0	0%	$0	0%	$0
Transportation	16%	$5,320	17%	$6,220	90%	$6,220					
Vehicle purchases (net outlay)	8%	$2,835	9%	$3,314	100%	$3,314	1	0%	$0	0%	$0
Gasoline and motor oil	5%	$1,534	5%	$1,793	100%	$1,793	0	0%	$0	0%	$0
Maintenance and repairs	2%	$637	2%	$745	100%	$745	0	0%	$0	0%	$0
Public and other transportation	1%	$314	1%	$367	100%	$367	0	0%	$0	0%	$0
Healthcare	3%	$1,158	4%	$1,354	90%	$1,218					
Medical services	2%	$618	2%	$723	90%	$650	0	0%	$0	0%	$0
Drugs	1%	$426	1%	$498	90%	$448	0	0%	$0	0%	$0
Medical supplies	0%	$114	0%	$133	90%	$120	0	0%	$0	0%	$0
Entertainment	6%	$1,902	6%	$2,224	90%	$2,001	0	5%	$100	5%	$100
Personal care products and services	2%	$527	2%	$616	90%	$555	6	20%	$111	20%	$111
Reading	0%	$92	0%	$108	90%	$97	0	0%	$0	0%	$0
Tobacco products and smoking supplies	1%	$359	1%	$420	90%	$378	0	10%	$38	10%	$38
Subtotal Retail Expenditures	**53%**	**$17,890**	**59%**	**$20,916**		**$19,446**			**$748**		**$1,747**

[1] The Bureau of Labor Statistics' Consumer Expenditure Survey shows spending by household income deciles. The fourth decile was used in this table, since it is the closest to the anticipated household incomes in the Project.
[2] Assumes that e-commerce accounts for 10% of all sales (excluding gasoline and automobiles). This assumption is supported by provided by CoStar in the State of the U.S. Retail Market, 2017 Q1 Review and Forecast.
[3] From Reference USA. See Figure A-3.
[4] Capture rates are based on professional judgement, informed by the number and character of existing businesses within the HOT business district.
[5] Annual household income and amount spent on housing for Project households was provided by St. Anton Communities and the City of Roseville.
Source: Bureau of Labor Statistics, Consumer Expenditure Survey, Table 1110, 2016, CoStar, Reference USA, and New Economics.
Prepared by New Economics & Advisory, February 2018.

5 Parking Space Value Calculations
HOT Business District

Description	Assumption	Amount	Notes
Net Annual Sales Made to Those Who Drive to the HOT Business District			
Total Estimated Annual Sales Generated by Retail Businesses		$4,860,000	[1]
Portion Made to Those Arriving by Public Transit, Biking, or Walking	13%	($648,000)	[2]
Net Annual Retail Sales Made to Those Who Drive to the District		**$4,212,000**	
Calculation of Annualized Weekend Sales (Peak Period) Per Parking Space			
Portion of Sales Generated at Peak Period (Weekends)	*54%*		[3]
Net Annual Sales Generated During Weekends		*$2,293,200*	
Publicly-accessible parking spaces available in HOT Business District		532	[4]
Net Available Spaces, Assuming 20% Parking Vacancy Rate	80%	426	[5]
Annual Value of Weekend Sales Per Parking Space (Rounded)		**$5,400**	

[1] Based on City's taxable sales data, adjusted to account for non-taxable sales.

[2] Based on average response from interviews with Old Town businesses. See Figure A-5.

[3] Based on average response from interviews with Old Town businesses. See Figure A-5.

[4] From Fehr & Peers, Historic Old Town Roseville Parking Study Memorandum, September 26, 2017.

[5] Assumes 20% of spaces are vacant even during "peak" periods, based on the Fehr & Peers, Historic Old Town Roseville Parking Study Memorandum, September 26, 2017.

Sources: City of Roseville, Individual business representatives, Fehr & Peers, and New Economics.

Prepared by New Economics & Advisory, February 2018.

Appendix A: Technical Support Tables

A-1 Project Description
Junction Crossings

Item	Amount
Studio Units	20
1-Bedroom Units	60
Total Affordable Units	**80**
Low-Income	90%
Very Low-Income	10%
Rent Ranges	$607 - $781

Source: City of Roseville; St. Anton Communities.

Prepared by New Economics & Advisory, February 2018.

A-2 Parking Spaces (Net)
Junction Crossings

Project	Junction Crossings Alone [1]	Near Term: 3 Projects [2]	
Spaces Removed	-50	-79	
New Spaces	39	129	[3]
Net Spaces	-11	50	

[1] From the Junction Crossings Conceptual Site Plan prepared by KTGY, and Alta Parking Survey, 2017. Survey shows 38 striped, paved spaces under current conditions, and additional discussion with the Project applicant and City of Roseville have indicated that an additional space exists for up to 12 vehicles (for a total of 50).

[2] Includes Phase 1 of the Third Track Project, Pacific Plaza, and Junction Crossings.

[3] 129 spaces because ALT 2 CCJPA site was used.

Source: Fehr & Peers, Historic Old Town Roseville Parking Study Memorandum, September 26, 2017, KTGY Site Plan, Alta Parking Survey, St. Anton Communities, and the City of Roseville.

Prepared by New Economics & Advisory, February 2018.

A-3 *Company Information*
Junction Crossings

Company Name	Address	Primary NAICS Description	Location Employee Size Range	Location Employee Size Actual	Location Sales Volume Range	Square Footage
Kids First	124 Main St	Other Individual & Family Services	20-49	30	$1-2.5 Million	20,000 - 39,999
Boxing Donkey Irish Pub	300 Lincoln St	Full-Service Restaurants	10-19	15	$500,000-1 Million	2,500 - 4,999
Network Truck Insurance	120 Main St	Insurance Agencies & Brokerages	10-19	13	$1-2.5 Million	5,000 - 9,999
Builders Advantage Ins Svc Inc	107 Main St	Third Party Administration-Insurance/Pension Funds	10-19	12	$1-2.5 Million	5,000 - 9,999
Trocadero	119 Church St	Drinking Places Alcoholic Beverages	10-19	10	$500,000-1 Million	2,500 - 4,999
Old Town Pizza	120 Church St	Full-Service Restaurants	5-9	8	Less Than $500,000	2,500 - 4,999
Before & After-Pagelab	323 Lincoln St	Periodical Publishers	5-9	8	$1-2.5 Million	2,500 - 4,999
Comcast Corp	400 Lincoln St	Electrical Contr & Other Wiring Installation Contr	5-9	8	$1-2.5 Million	1,500 - 2,499
Pacific Street Cafe	301 Lincoln St	Full-Service Restaurants	5-9	7	Less Than $500,000	1 - 1,499
Bar 101	101 Main St	Drinking Places Alcoholic Beverages	5-9	6	Less Than $500,000	1,500 - 2,499
Airport Shuttle	106 Church St	All Other Transit & Ground Passenger Trnsprtn	5-9	5	$500,000-1 Million	5,000 - 9,999
ADT Security Svc	126 Main St	Security Systems Services (Except Locksmiths)	5-9	5	$1-2.5 Million	2,500 - 4,999
William Herald Assoc Inc	110 Main St	Architectural Services	5-9	5	$500,000-1 Million	1,500 - 2,499
Bud Mikaelsen Food Eqpt & Dsgn	303 Lincoln St	Supermarkets/Other Grocery (Exc Convenience) Strs	5-9	5	$1-2.5 Million	1,500 - 2,499
Loyal Order Of Moose	506 Lincoln St	Civil & Social Organizations	5-9	5		2,500 - 4,999
Backstreet Salon	106 Church St # 1	Beauty Salons	1-4	4	Less Than $500,000	1 - 1,499
Legacy Benefits & Ins Svc	120 Church St	Insurance Agencies & Brokerages	1-4	4	$500,000-1 Million	1,500 - 2,499
English Rose Nannies	100 Main St	Child & Youth Services	1-4	4	Less Than $500,000	1 - 1,499
Sassy's Salon & Spa	112 Main St	Beauty Salons	1-4	4	Less Than $500,000	1 - 1,499
Alex's-The Right Cut	318 Lincoln St	Beauty Salons	1-4	4	Less Than $500,000	1 - 1,499
Bijou Beauty	311 Lincoln St	Beauty Salons	1-4	4	Less Than $500,000	1 - 1,499
Fido Property Svc Inc	106 Church St # 6	Lessors-Nonresidential Bldgs (Exc Miniwarehouses)	1-4	3	$1-2.5 Million	2,500 - 4,999
West Coast Real Estate & Mrtg	117 Church St	Real Estate Credit	1-4	3	$1-2.5 Million	2,500 - 4,999
Blue Northern Builders Inc	108 Main St	Commercial & Institutional Building Construction	1-4	3	$1-2.5 Million	1 - 1,499
Uprock Audio Inc	114 Main St	Electronic Stores	1-4	3	$500,000-1 Million	1,500 - 2,499
3rd Saturday Art Walk	311 Lincoln St	Art Dealers	1-4	3	$500,000-1 Million	2,500 - 4,999
El Charro Taqueria & Bakery	346 Lincoln St	Retail Bakeries	1-4	3	Less Than $500,000	1 - 1,499
Iron Dragon Martial Arts Inst	121 Church St	Sports & Recreation Instruction	1-4	2	Less Than $500,000	1 - 1,499
L N Craig Construction Inc	106 Church St # 1	New Single-Family Hsng Constr (Exc For-Sale Bldrs)	1-4	2	$500,000-1 Million	1,500 - 2,499
Avitua, Carey Lyn Agt	120 Main St	Insurance Agencies & Brokerages	1-4	2	Less Than $500,000	1,500 - 2,499
Broomell Law Firm	108 Main St	Offices Of Lawyers	1-4	2	Less Than $500,000	1,500 - 2,499
Onyx Club	116 Main St	Full-Service Restaurants	1-4	2	Less Than $500,000	1 - 1,499
Pretty In Ink Tattoo	326 Lincoln St	All Other Personal Services	1-4	2	Less Than $500,000	1 - 1,499
Scissors & Blades Barber Shop	318 Lincoln St	Barber Shops	1-4	2	Less Than $500,000	1 - 1,499
Roseville Fire Museum	400 Lincoln St	Museums	1-4	2		1,500 - 2,499
Blakemore Construction	127 Church St	Commercial & Institutional Building Construction	1-4	1	Less Than $500,000	1 - 1,499
One Eleven Music Studio	127 Church St	Fine Art Schools	1-4	1		1 - 1,499
Cannon, Megan L	124 Main St	Offices-Mental Health Practitioners (Exc Physcns)	1-4	1	Less Than $500,000	1,500 - 2,499
Fast Freddie's Pizzeria	130 Main St	Full-Service Restaurants	1-4	1	Less Than $500,000	1 - 1,499
Brightstar Care	311 Lincoln St	Home Health Care Services	1-4	1	Less Than $500,000	1,500 - 2,499
Guitar Lab	311 Lincoln St	Musical Instrument & Supplies Stores	1-4	1	Less Than $500,000	1,500 - 2,499
Ursamajor Massage	322 Lincoln St	Other Personal Care Services	1-4	1	Less Than $500,000	1 - 1,499
Emerald Palms LLC	117 Church St	Unclassified Establishments	N/A	N/A	N/A	1 - 1,499
Innovative Fire Systems	108 Main St	Unclassified Establishments	N/A	N/A	N/A	1,500 - 2,499
Eleventh & James	307 Lincoln St	Unclassified Establishments	N/A	N/A	N/A	1 - 1,499
L & C Hagans	313 Lincoln St	Unclassified Establishments	N/A	N/A	N/A	1 - 1,499
One Stop Auto and RV's	200 Washington St	N/A	N/A	N/A	N/A	N/A
Four Score Coffee House	327 Lincoln St	N/A	N/A	N/A	N/A	N/A
Porch Swing Pickings	307 Lincoln St	N/A	N/A	N/A	N/A	N/A
La Belle Vie	323 Lincoln St	N/A	N/A	N/A	N/A	N/A

Source: Reference USA, accessed November, 2017. List was supplemented by a site visit to the HOT Business District in December, 2017.
Prepared by New Economics & Advisory, February 2018.

A-4 Key Business Types in Old Town Roseville

Junction Crossings

Company Name	Employee Size	Square Footage	Total # of Establishments
Restaurants			
Boxing Donkey Irish Pub	15	2,500 - 4,999	
Old Town Pizza	8	2,500 - 4,999	
Pacific Street Cafe	7	1 - 1,499	
Onyx Club	2	1 - 1,499	
Fast Freddie's Pizzeria	1	1 - 1,499	
Four Score Coffee House [1]	N/A	N/A	
Total	**33**		**6**
Beauty Salons			
Backstreet Salon	4	1 - 1,499	
Sassy's Salon & Spa	4	1 - 1,499	
Alex's-The Right Cut	4	1 - 1,499	
Bijou Beauty	4	1 - 1,499	
Scissors & Blades Barber Shop	2	1 - 1,499	
Total	**18**		**5**
Insurance			
Network Truck Insurance	13	5,000 - 9,999	
Builders Advantage Ins Svc Inc	12	5,000 - 9,999	
Legacy Benefits & Ins Svc	4	1,500 - 2,499	
Avitua, Carey Lyn Agt	2	1,500 - 2,499	
Total	**31**		**4**

[1] Business was found through an in-person site visit, but was not included in the Reference USA business database, likely because it is a relatively new business.

Source: Reference USA

Prepared by New Economics & Advisory, February 2018.

A-5 *Summary of Interview Responses from Old Town Business Representatives [1]*
Junction Crossings

Description	Amount
When is your busiest time period?	
Business 1	Friday/ Saturday 5:00 - 8:00
Business 2	Friday 11:00 AM to Close
Business 3	Thursday - Sunday 3:00 - Close
Business 4	Saturday/ Sunday
Approximately How Much of Your Weekly Sales Come During these Busiest Periods?	
Business 1	40% (Approx.)
Business 2	*N/A*
Business 3	50% (Approx.)
Business 4	90% (Approx.)
% of Sales Per "Busy-Day"	
Business 1	20%
Business 2	N/A
Business 3	17%
Business 4	45%
Average	***27%***
How Many of Your Customers Arrive By Some Method Other Than Driving?	
Business 1	10%
Business 2	5%
Business 3	25%
Business 4	N/A
Average	***13%***

Source: Interviews with individual businesses in Historic Old Town Roseville.

[1] Only restaurants and drinking establishments were interviewed during this effort. The names of individual businesses have been withheld in order to preserve confidentiality.

Prepared by New Economics & Advisory, February 2018.