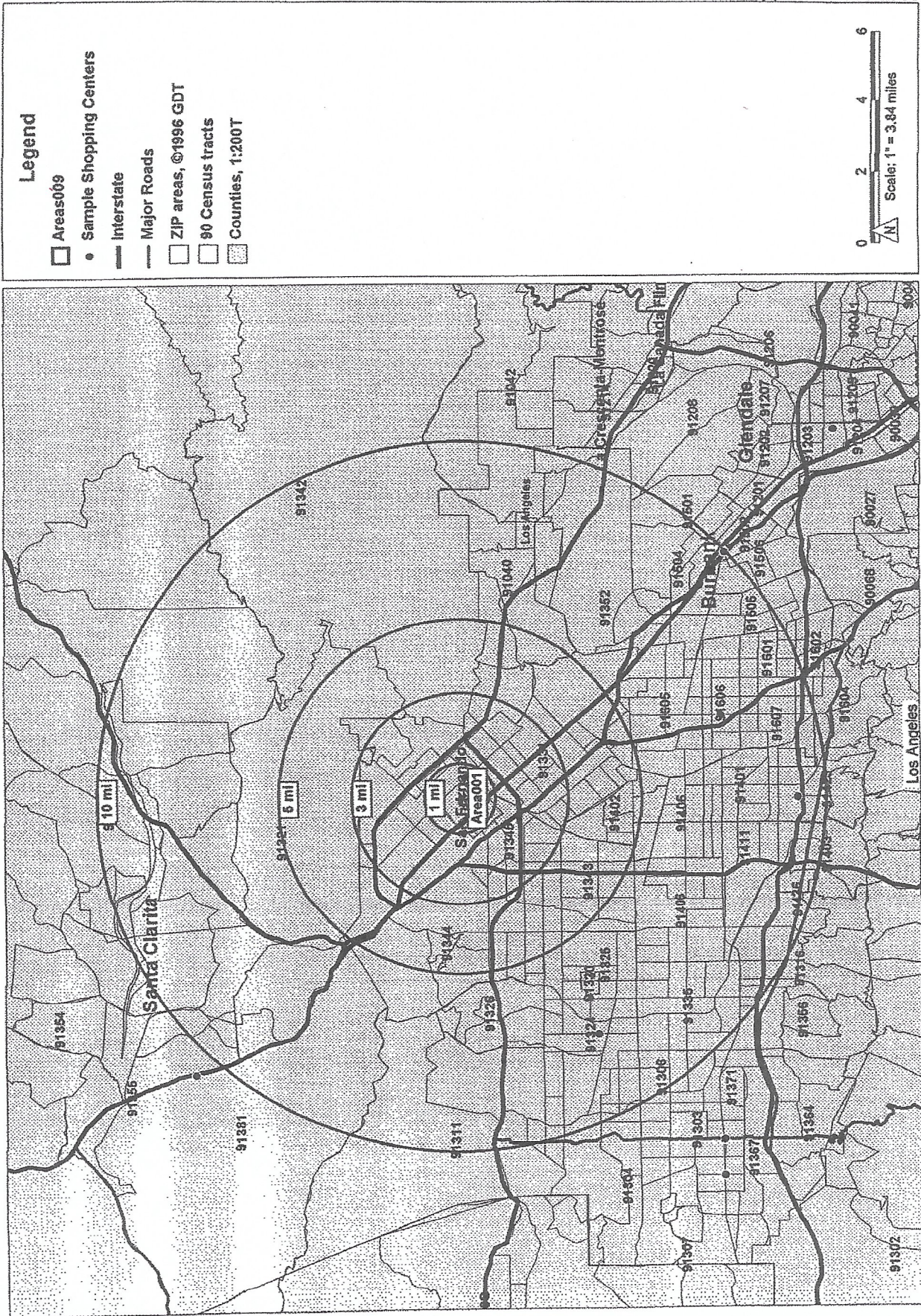


San Fernando Trade Area

Stoffel DMG

Map produced with Scan/US



03/04/97

Source: GSA; DMG Economics, 2/97

Detailed Demographic Update: 1996
 San Fernando Trade Area
 Demographics

Scan/US, Inc.
 03/04/97
 Page 1 of 4

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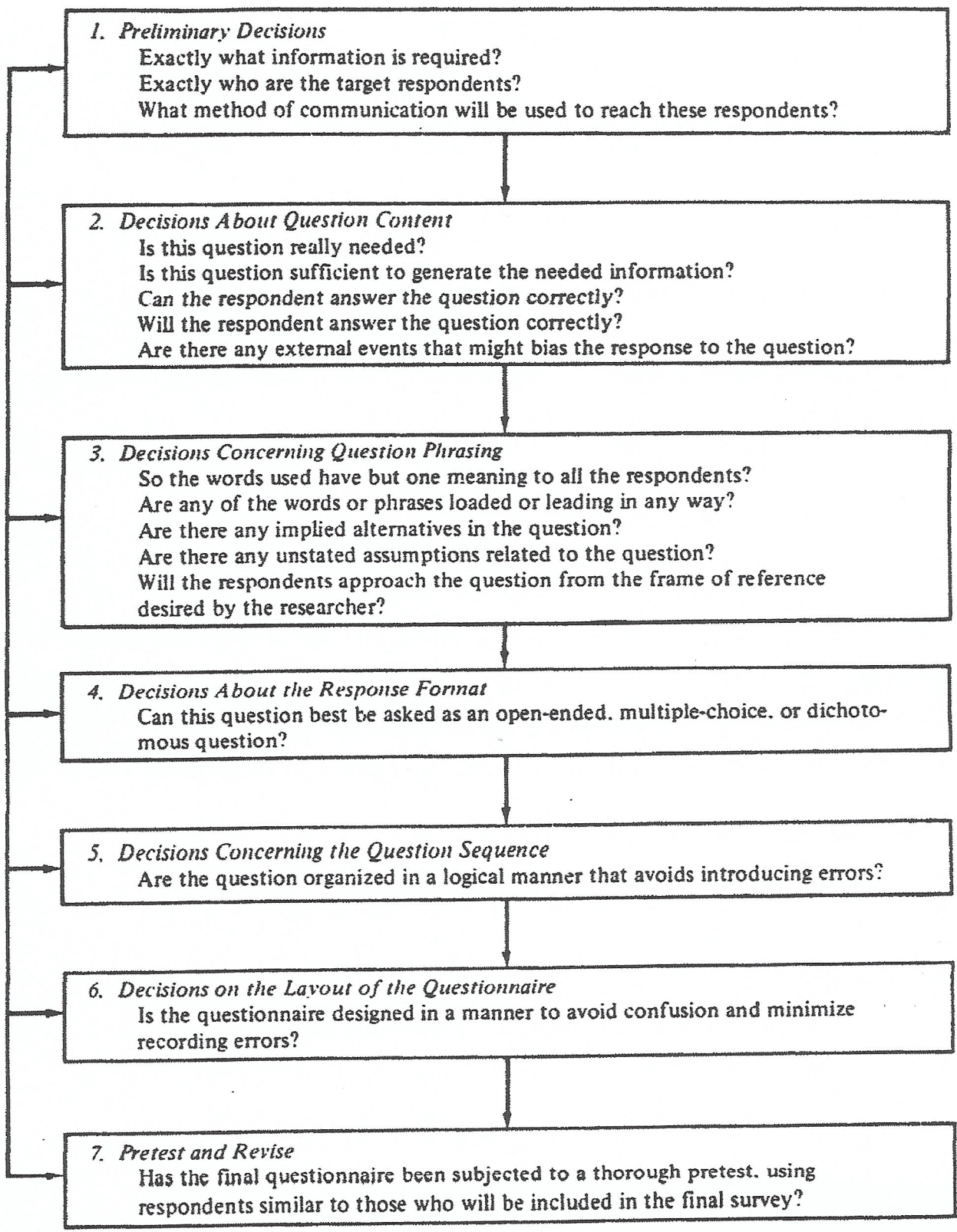
	1 MI RING		3 MI RING		5 MI RING	
Population	36,264		187,275		364,363	
In Families	29,906	82.5%	155,331	82.9%	298,827	82.0%
In Non-families	5,532	15.3%	28,793	15.4%	59,853	16.4%
In Group Quarters	826	2.3%	3,151	1.7%	5,683	1.6%
Race						
White	15,229	42.0%	83,872	44.8%	185,186	50.8%
Black	1,909	5.3%	15,763	8.4%	29,142	8.0%
American Indian	217	0.6%	1,212	0.6%	2,124	0.6%
Asian/Pacific Isl.	1,464	4.0%	11,460	6.1%	35,913	9.9%
Other Race	17,445	48.1%	74,968	40.0%	111,998	30.7%
Hispanic Population	29,917	82.5%	132,243	70.6%	210,963	57.9%
Age						
< 6 years	3,629	10.0%	17,720	9.5%	33,007	9.1%
6-9 years	3,409	9.4%	16,742	8.9%	30,141	8.3%
10-13 years	2,413	6.7%	12,245	6.5%	22,096	6.1%
14-17 years	2,442	6.7%	12,392	6.6%	22,640	6.2%
18-20 years	1,697	4.7%	8,849	4.7%	16,459	4.5%
21-24 years	2,487	6.9%	12,359	6.6%	23,802	6.5%
25-29 years	3,113	8.6%	15,608	8.3%	30,632	8.4%
30-34 years	3,251	9.0%	16,385	8.7%	32,077	8.8%
35-39 years	2,929	8.1%	15,752	8.4%	31,238	8.6%
40-44 years	2,344	6.5%	12,927	6.9%	26,406	7.2%
45-49 years	1,947	5.4%	11,310	6.0%	23,026	6.3%
50-54 years	1,458	4.0%	8,461	4.5%	17,248	4.7%
55-59 years	1,124	3.1%	6,638	3.5%	13,576	3.7%
60-64 years	941	2.6%	5,363	2.9%	11,232	3.1%
65-69 years	900	2.5%	4,839	2.6%	10,384	2.8%
70-74 years	794	2.2%	3,881	2.1%	8,240	2.3%
75-79 years	605	1.7%	2,775	1.5%	5,772	1.6%
80-84 years	394	1.1%	1,630	0.9%	3,395	0.9%
85+ years	387	1.1%	1,399	0.7%	2,992	0.8%
Median Age	28.3		29.3		30.7	
Marital Status						
Population, 25+	20,187		106,968		216,218	
Never married	3,577	17.7%	18,854	17.6%	37,847	17.5%
Now married	12,545	62.1%	67,360	63.0%	135,326	62.6%
Separated	787	3.9%	4,204	3.9%	7,768	3.6%
Widowed	1,562	7.7%	6,990	6.5%	14,567	6.7%
Divorced	1,716	8.5%	9,560	8.9%	20,710	9.6%
Households	8,571		46,883		101,258	
Avg Hshld Size	4.13		3.93		3.54	
Families	6,700	78.2%	36,498	77.8%	76,158	75.2%
Avg Fam Size	4.46		4.26		3.92	
Non-families	1,871	21.8%	10,385	22.2%	25,100	24.8%
Avg Non-Fam HH Size	2.96		2.77		2.38	
Persons Per Hshld						
1 person	1,500	17.5%	8,328	17.8%	19,378	19.1%
2 persons	1,719	20.1%	11,410	24.3%	26,407	26.1%
3 persons	1,224	14.3%	7,267	15.5%	16,967	16.8%
4 persons	1,358	15.8%	6,948	14.8%	15,581	15.4%
5 persons	1,049	12.2%	4,911	10.5%	9,640	9.5%
6+ persons	1,721	20.1%	8,019	17.1%	13,285	13.1%

Detailed Demographic Update: 1996
 San Fernando Trade Area
 Demographics

	1 MI RING		3 MI RING		5 MI RING	
Per Capita Income	\$10,380		\$12,738		\$15,087	
Aggregate Income (M)	\$376.40		\$2,385.60		\$5,497.07	
Household Income	8,571		46,883		101,258	
< \$14,999	1,241	14.5%	6,121	13.1%	12,770	12.6%
\$15,000 - \$19,999	608	7.1%	2,838	6.1%	5,890	5.8%
\$20,000 - \$24,999	646	7.5%	3,007	6.4%	6,084	6.0%
\$25,000 - \$29,999	455	5.3%	2,426	5.2%	5,308	5.2%
\$30,000 - \$34,999	391	4.6%	2,407	5.1%	5,155	5.1%
\$35,000 - \$39,999	666	7.8%	3,158	6.7%	6,731	6.6%
\$40,000 - \$49,999	1,055	12.3%	5,361	11.4%	11,271	11.1%
\$50,000 - \$59,999	1,015	11.8%	5,216	11.1%	11,106	11.0%
\$60,000 - \$74,999	935	10.9%	5,737	12.2%	11,962	11.8%
\$75,000 - \$99,999	836	9.8%	5,418	11.6%	11,920	11.8%
\$100,000 - \$124,999	421	4.9%	2,805	6.0%	6,531	6.4%
\$125,000 - \$149,999	139	1.6%	1,075	2.3%	2,820	2.8%
\$150,000 +	163	1.9%	1,314	2.8%	3,710	3.7%
Aggregate HH Income (M)	\$375.51		\$2,380.31		\$5,480.22	
Average HH Income	\$43,812		\$50,771		\$54,121	
Median HH Income	\$42,005		\$46,750		\$48,974	
Family Income	6,700		36,498		76,158	
< \$14,999	685	10.2%	3,596	9.9%	6,999	9.2%
\$15,000 - \$19,999	433	6.5%	2,093	5.7%	4,118	5.4%
\$20,000 - \$24,999	521	7.8%	2,364	6.5%	4,554	6.0%
\$25,000 - \$29,999	367	5.5%	1,818	5.0%	3,726	4.9%
\$30,000 - \$34,999	322	4.8%	1,808	5.0%	3,696	4.9%
\$35,000 - \$39,999	561	8.4%	2,611	7.2%	5,287	6.9%
\$40,000 - \$49,999	892	13.3%	4,365	12.0%	8,605	11.3%
\$50,000 - \$59,999	821	12.3%	4,286	11.7%	8,738	11.5%
\$60,000 - \$74,999	763	11.4%	4,716	12.9%	9,658	12.7%
\$75,000 - \$99,999	737	11.0%	4,573	12.5%	9,875	13.0%
\$100,000 - \$124,999	343	5.1%	2,387	6.5%	5,547	7.3%
\$125,000 - \$149,999	112	1.7%	887	2.4%	2,316	3.0%
\$150,000 +	143		994		3,039	
Aggregate Fam Income (M)	\$326.47		\$2,025.02		\$4,587.76	
Average Fam Income	\$48,727		\$55,483		\$60,240	
Median Fam Income	\$44,336		\$49,436		\$52,800	
Non-family Income	1,871		10,385		25,100	
< \$14,999	556	29.7%	2,525	24.3%	556	2.2%
\$15,000 - \$19,999	175	9.4%	745	7.2%	1,772	7.1%
\$20,000 - \$24,999	125	6.7%	643	6.2%	1,530	6.1%
\$25,000 - \$29,999	88	4.7%	608	5.9%	1,582	6.3%
\$30,000 - \$34,999	69	3.7%	599	5.8%	1,459	5.8%
\$35,000 - \$39,999	105	5.6%	547	5.3%	1,444	5.8%
\$40,000 - \$49,999	163	8.7%	996	9.6%	2,666	10.6%
\$50,000 - \$59,999	194	10.4%	930	9.0%	2,368	9.4%
\$60,000 - \$74,999	172	9.2%	1,021	9.8%	2,304	9.2%
\$75,000 - \$99,999	99	5.3%	845	8.1%	2,045	8.1%
\$100,000 - \$124,999	78	4.2%	418	4.0%	984	3.9%
\$125,000 - \$149,999	27	1.4%	188	1.8%	504	2.0%
\$150,000 +	20	1.1%	320	3.1%	671	2.7%
Non-fam income (M)	\$49.04		\$355.30		\$892.46	
Average Non-fam Income	\$26,211		\$34,212		\$35,556	
Median Non-fam Income	\$33,221		\$40,058		\$38,973	

T 8-2

QUESTIONNAIRE CONSTRUCTION



1996 Anaheim Hills Festival Exit Survey

Interviewer: _____

Location: _____

1) First of all, please tell me the zip code of your residence.

_____ (If refused, discontinue) (10-14)

2) What was the primary purpose of your visit to Anaheim Hills Festival Center today?
(Do not read list. Probe. Check all that apply.)

- (15) -1 [] Work at a store or restaurant in the center - *Terminate interview* (15-16)
- 2 [] General shopping, browse, look around
- 3 [] To shop for groceries
- 4 [] To shop for clothes
- 5 [] To purchase a gift
- 6 [] To eat at a specific restaurant
- 7 [] To go to the movies

To visit a specific store:

- (16) -1 [] Target
- 2 [] Mervyn's
- 3 [] Marshall's
- 4 [] T.J. Maxx
- 5 [] Pavilions (Grocery)
- 6 [] Edward's Cinemas
- 7 [] Discovery Zone
- 8 [] Men's Wearhouse
- 9 [] Super Crown Books
- 0 [] Three D Bed & Bath
- X [] Crown Ace Hardware
- Y [] Other specific purpose (Specify) _____ (17)

3) Please tell me all of the stores in the Anaheim Hills Festival, including restaurants and the cinema, you visited or will visit today regardless of whether or not you made or plan to make a purchase.
(If respondent cannot recall stores, show card with store list.)

#1 _____ #2 _____ #3 _____ #4 _____ #5 _____ #6 _____ (18-29)

4) What was the approximate total amount you spent today here at Anaheim Hills Festival including all purchases, groceries, food, dining and movies? (Do not read.)

- 1 [] 0, nothing spent
 - 2 [] Less than \$50.00
 - 3 [] \$50.00-\$74.99
 - 4 [] \$75.00-\$99.99
 - 5 [] \$100.00-\$149.99
 - 6 [] \$150.00-\$199.99
 - 7 [] \$200.00-\$299.99
 - 8 [] \$300.00-\$399.99
 - 9 [] \$400.00-\$499.99
 - 0 [] \$500.00 or more
- (30)

5) What was the approximate total amount your spent today only at Pavilions? (Do not read.)

- 1 [] 0, nothing spent
 - 2 [] Less than \$25.00
 - 3 [] \$25.00 - \$49.99
 - 4 [] \$50.00 - \$74.99
 - 5 [] \$75.00 - \$99.99
 - 6 [] \$100.00 - \$149.99
 - 7 [] \$150.00 - \$199.99
 - 8 [] \$200.00 - \$299.99
 - 9 [] \$300.00 - \$399.99
 - 0 [] \$400.00 or more
- (31)

6) What would be the best way for Anaheim Hills Festival to communicate with you regarding new store openings, center promotions, sales events, etc.? (Read list. Accept multiple responses.)

- 1 [] Direct Mail (32)
- 2 [] Newspaper
- 3 [] Radio
- 4 [] In-center signs, posters, flyers
- 5 [] Coupons
- 6 [] Other _____

7) Which of these newspapers do you read regularly? (Read List. Accept multiple responses.)

- 1 [] L.A. Times
- 2 [] O.C. Register
- 3 [] Brea Progress
- 4 [] Placentia News-Times
- 5 [] Anaheim Hills News
- 6 [] Yorba Linda Star (33)
- 7 [] Corona/Norco Independent
- 8 [] Other _____

8) Which of the following cable television channels do you view regularly? (Read List. Accept multiple responses.)

- 1 [] USA
- 2 [] Lifetime
- 3 [] TNT - Turner
- 4 [] ESPN - Sports Channel
- 5 [] CNN - Cable News Network
- 6 [] VH-1 - Video Music (34)
- 7 [] MTV - Music Television
- 8 [] Discovery Channel
- 9 [] Do not watch any of these
- 0 [] Other

9) How many times have you shopped at or visited this center in the past month?

- 1 2 3 4 5 6 7 8 9 10+ (35)

10) Other than Anaheim Hills Festival, what shopping centers, similar to this center, have you shopped at or visited in the past two months? (Do not read list. Accept multiple responses.)

	<u>Center Name</u>	<u>Significant Stores</u>	
(36)	-1 [] Brea Mall	Nordstrom, Broadway, Robinsons-May, Sears	(36-37)
	-2 [] Galleria at Tyler	Nordstrom, JCPenney, Broadway, Robinsons-May	
	-3 [] Main Place	Nordstrom, Bullocks, Robinsons-May	
	-4 [] Mall of Orange	Sears, JCPenney	
	-5 [] South Coast Plaza	Sears, Nordstrom, Bullock's, Robinson's-May	
	-6 [] Tustin Market Place	Ikea, Home Depot, Toys "R" Us, Chick's, Good Guys, Ross	
	-7 [] (Alpha Beta Center)	Alpha Beta, CVS (Nohl Ranch Rd. & Anaheim Hills Rd.)	
	-8 [] Anaheim Hills Village	Hughes (Santa Ana Canyon & Fairmont)	
	-9 [] Bryant Ranch Center	Ralph's (La Palma Road & Via Lomas de Yorba)	
	-0 [] Canyon Plaza	Delaney's (Imperial & Santa Ana Canyon)	
(37)	-1 [] Canyon Village	Lucky, Sav-on (Imperial & La Palma)	
	-2 [] The Crossroads	Vons, Thrifty (Imperial & Santa Ana Canyon)	
	-3 [] Imperial Promenade	Cinemaopolis (Imperial near Yorba Linda Blvd.)	
	-4 [] Rancho Yorba Town & Cntry.	Vons, Thrifty (Imperial & Santa Ana Canyon)	
	-5 [] Sycamore Canyon Plaza	Ralph's, Sav-on Express (Weir Canyon & Serrano)	
	-6 [] Other _____		
	-7 [] Don't Know		

11) What do you like best about Anaheim Hills Festival?
(Do not read list. Record multiple responses. Probe.)

(38-40)

Location:

- (38) -1 [] Convenient location
- 2 [] Close to home
- 3 [] Close to work
- 4 [] On the way to home or work

Selection:

- 5 [] Good choice of major stores
- 6 [] Good choice of smaller stores
- 7 [] Good selection of restaurants
- 8 [] Like Discovery Zone
- 9 [] Like Target
- 0 [] Like Marshalls
- X [] Like T.J. Maxx
- Y [] Like Mervyns
- (39) -1 [] Like Pavilions
- 2 [] Like Three D Bed and Bath
- 3 [] Like Super Crown Books
- 4 [] Like Warehouse
- 5 [] Like another store _____

Entertainment/Dining:

- 6 [] Like Edwards Cinema
- 7 [] Like Coco's
- 8 [] Like another restaurant

Security:

- 9 [] Feeling of security/safety
- 0 [] Security personnel are always present/visible
- X [] Aware of/feel safer with Police Substation

Operational:

- (40) -1 [] Convenient/adequate parking
- 2 [] Pleasant atmosphere
- 3 [] Clean, cleanliness of center

Other:

- 4 [] Familiar/know it better than other centers
- 5 [] Less expensive/better prices/value
- 6 [] Good place to meet friends
- 7 [] Open-air center
- 8 [] Not crowded
- 9 [] New
- 0 [] Good place for movies and dining
- X [] Other _____

12) What do you like least about Anaheim Hills Festival?
(Do not read list. Record multiple responses. Probe.)

(41-43)

Location:

- (41) -1 [] Not convenient location
- 2 [] Not close to home
- 3 [] Not close to work
- 4 [] Not on the way to home or work

Selection:

- 5 [] Limited selection of stores/store types
- 6 [] Doesn't have the stores I like
- 7 [] Insufficient apparel/clothing stores
- 8 [] Don't like the selection of restaurants/need more

Stores:

- 9 [] Prices are too high/expensive
- 0 [] Service problems at center stores

Parking:

- (42) -1 [] Parking is not adequate
- 2 [] Parking is not convenient
- 3 [] Circulation in parking lots is poor
- 4 [] Poor access in and out of center
- 5 [] Parking lots are confusing
- 6 [] Poor parking lot signage

Operational:

- 7 [] Hard to know where to go
- 8 [] Center seems dead/lack of activity
- 9 [] Center isn't friendly
- 0 [] Center looks dirty
- X [] Center needs better signage

Security:

- (43) -1 [] Don't feel safe at night
- 2 [] Don't feel safe at any time of day
- 3 [] Lighting is poor
- 4 [] Other _____

- 13) When you choose a family dining restaurant, which one restaurant most frequently comes to mind? (44)
- 1 [] Chevy's
 - 2 [] Coco's
 - 3 [] Other _____
 - 4 [] Don't Know/No Answer

14) How many times have you dined at this Chevy's during the past month?

(45-46)

15) On a scale from 1 to 6, 6 being outstanding, 1 being unsatisfactory, please rate your last dining experience at Chevy's?

- 1 [] -2 [] -3 [] -4 [] -5 [] -6 [] -7 [] Have never dined (47)

(For those responding 1-3) Why? (48)

- 1 [] Service poor
- 2 [] Food quality poor
- 3 [] Limited Menu
- 4 [] Prices too high
- 5 [] Wait too long before seating
- 6 [] Other _____

16) How many times have you dined at this Coco's in the past month?

(49-50)

17) On a scale from 1 to 6, please rate your last dining experience at Coco's.

- 1 [] -2 [] -3 [] -4 [] -5 [] -6 [] -7 [] Have never dined (51)

(For those responding 1-3) Why? (52)

- 1 [] Service poor
- 2 [] Food quality poor
- 3 [] Limited Menu
- 4 [] Prices too high
- 5 [] Wait too long before seating
- 6 [] Other _____

The following questions are for demographic purposes only,

18) Starting with yourself, please tell me the age and sex of each person residing in your household? (Do Not Read List.)
(Insert ages in years)

Female	Male	-X [] Refused
____(53-54)	____(55-56)	(Respondent)
____(57-58)	____(59-60)	(Other HH Heads)
____(61-62)	____(63-64)	
____(65-66)	____(67-68)	
____(69-70)	____(71-72)	
____(73-74)	____(75-76)	

19) Lastly, please tell me which category includes your household's total 1995 income. (Read List.)

- 1 [] Under \$15,000
- 2 [] \$15,000 to \$24,999
- 3 [] \$25,000 to \$34,999
- 4 [] \$35,000 to \$44,999
- 5 [] \$45,000 to \$54,999
- 6 [] \$55,000 to \$64,999
- 7 [] \$65,000 to \$74,999
- 8 [] \$75,000 to \$84,999
- 9 [] \$85,000 to \$99,999
- 0 [] \$100,000 or more
- X [] Refused

(77)

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That's all of our questions. Thank you very much for your cooperation.

Ethnicity: -1 [] White -2 [] Asian -3 [] Hisp. -4 [] Black -5 [] Other (78)

Time of day: -1 [] 11-12 -2 [] 12-1 -3 [] 1-2 -4 [] 2-3 -5 [] 3-4 -6 [] 4-5 -7 [] 5-6 (79)

Day of Week: -1 [] Sat. -2 [] Sun. -3 [] Other (80)

Location: 1 2 3 4 5 6 7 8 9 10 (06)

Interviewer: 1 2 3 4 5 6 7 8 9 10 (07)

Interviewer's Initials: _____

Baywood Focus Group

CASTILE BUYERS

1. Introduction

Introductions of moderator and attendees

Moderator introduces topic and identifies objectives.

Moderator provides general introduction outlining the focus of this study.

Defines the concepts:

lifestyle -- How you actually use this home. What are the rooms used for.

streetscape -- The look and feeling you get from the homes as you pass down the street.

Identify this focus group as being done among buyers of Castile homes.

Moderator identifies the observation booth and recording.

2. Purchase motivation

Why did you decide to purchase this home?

What were you looking for in a home purchase? (Probe price, value, commute, family planning, differentiation of the home, Uniqueness of design)

Who was the most influential person to you during your shopping? Why?

Did you use a broker? How do you feel about your involvement?

How did you find out about Castile and what attracted you to this project?

Which competitive projects did you consider? Now, which ones were really serious alternatives to Castile?

What finally cinched your decision in favor of Castile?

3. Community Features

What is your opinion of Rancho Santa Margarita as a community?

What single feature of the community do you like best? Why?

What community characteristic would you like to see?

Do you walk for recreation here? Why?

Do you walk to get places in the community? Why?

Are you aware of the Town Center in Santa Margarita? (Probe with description/map)

4. Competitive Communities Considered

Did they shop in any other communities? Which ones?

What was the strongest reason for choosing RSM?

How important were the community's amenities?

How important were the community services/school/shopping?

Was a home near the Town Center an important issue for you?

Are all these planned communities about the same? Why? Why not?

Were they aware of any community issues before they moved in?

Did these play a role in your decision to purchase? What?

- 5. "Neo-Traditional" vs Typical Design
 - How would you describe the Castile neighborhood as compared to other neighborhoods?
 - Why didn't you purchase a more typically designed home with a rear yard and garage and driveway in front?
 - How would you compare your lot design to a more typical lot design? What would you say the pros and cons are in your home design?
- 6. Castile Project Amenities
 - What do you like or dislike about the Castile streetscape?
 - Would a more typical streetscape with garage doors and longer driveways have been more or less attractive?
 - Was it a consideration in your purchase that you did not have a pool and spa in your neighborhood?
 - Does a more typical neighborhood design seem more or less prestigious? Why?
 - Does the Castile design, with the pedestrian oriented front yard, and garage in the back seem more like a better walking environment than a typical streetscape?
- 7. Floor Plan and Design
 - What single design feature of your home do you like best? Why?
 - Which ones would you change? Why?
 - Would it have been any more attractive to you if you could have chosen any floor plan to put on your lot?
 - Would you have preferred a downstairs bedroom? How about a 5th bedroom?
- 8. Lifestyle Issues
 - Were the model homes decorated in a way that reflected anything in your lifestyle?
 - How many of you have kids? Planning to?
 - What is more important, inside or private outside space? Why?
 - How do you plan to use your outside space?
 - Would you prefer more outside or inside space? Why?
 - How do you feel about the usefulness of the outside space in your home as compared to a more typical back yard?
 - How have you used the inside spaces in your home? (Office, all bedrooms, options)
 - Would a gated community have been important to your decision making process?
 - How would you expect a gate on your community affect your home price and monthly association cost?

9. Baywood name test -- Introduction

Potential Graphics Needed:

- A. Blow up of Castile floor plans/lot schematic/site map (Matt)
- B. Town Center Map (Pick up from SMCo Thurs 10:00)