

Newport Pier Retail Study
For the City of Newport Beach

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TABLE OF CONTENTS

I.	INTRODUCTION.	1
	Purpose of the Study.....	1
	Existing Newport Pier.....	1
	Approach.....	1
II.	RETAIL ANALYSIS	6
	Overview of California Piers.....	6
	Retail Sales – State, County and City	9
	Demographic Analysis and Retail Sales – One-Quarter Mile of Piers.....	10
	Retail Space Available for Lease	15
	Newport Pier Restaurant Space.....	15
III.	HIGHEST AND BEST USE	16

LIST OF TABLES

A.	Summary of Per Capita Taxable Retail Sales.....	10
B.	Summary of Major Retail Categories (13 Selected Piers).....	11
C.	Summary of Major Retail Categories (Two Newport Beach Piers).....	12
D.	Summary of Average Annual Taxable Sales Per Restaurant.....	13
E.	Restaurant Types at 13 Selected Piers.....	14

LIST OF FIGURES

1. Newport Pier 2

2. Newport Beach Piers..... 3

3. Photos of Newport Pier 4

4. Photos of Newport Pier 5

5. California Piers Surveyed 8

6. Average Annual Taxable Sales Per Restaurant 13

APPENDICES

- Appendix A: Detailed Tables and Figures
- Appendix B: Aerial Maps and Photos of 43 California Piers

NEWPORT PIER RETAIL STUDY

I. Introduction

Purpose of the Study

The City of Newport Beach has requested that GRC Associates, Inc. prepare a retail study for the vacant restaurant structure at the end of the Newport Pier. The purpose of this study is to analyze the level of demand for various retail categories and determine the highest and best use of the vacant building space based on economic conditions. The City is currently considering alternative uses for the vacant structure at the end of the pier, such as improving or replacing the existing structure for use as a restaurant or to accommodate other uses.

Existing Newport Pier

The City-owned Newport Pier is located at West Ocean Front and 21st Place on the Balboa Peninsula in the City of Newport Beach. It is one of two piers located in the City; the other is the Balboa Pier located approximately one and three-quarter miles southeast from the Newport Pier. The Newport Pier is approximately 1,030 feet long and 25 feet wide. The State Office of Historical Preservation (SHPO) has designated the pier as California Historical Landmark No. 794 because of its statewide historical significance as the original site of McFadden Wharf. This was the site of the seaward terminus of the Santa Ana and Newport Railway, a major distribution point for lumber and other goods that built Orange, San Bernardino and Riverside Counties during the period from 1891 to 1907. SHPO review of a rehabilitation or new construction project on the pier would depend on the scale of project, the funding source(s) and whether CEQA review is required. Ministerial projects would not require SHPO review.

Currently, the Newport Pier is used primarily as a walking and recreational fishing pier, including a vacant 4,055-square foot restaurant structure at the end of the pier. At the base of the pier is the Dory Fishing Fleet Market which was founded in 1891, as well as the Newport Beach Fire Department Lifeguard Headquarters. In addition, within the vicinity of the pier are numerous restaurants, retail establishments and parking. **Figure 1** shows an aerial view of the Newport Pier and **Figure 2** shows its location within the City. **Figures 3 and 4** are photos of the pier, the vacant restaurant structure and the adjacent uses.

Approach

In addition to reviewing economic conditions surrounding the Newport Pier, GRC assessed over 40 piers throughout California in order to evaluate retail uses and economic conditions at these piers. These California piers included those from The Embarcadero waterfront in San Francisco to the pier in Imperial Beach near the U.S.-Mexico border.

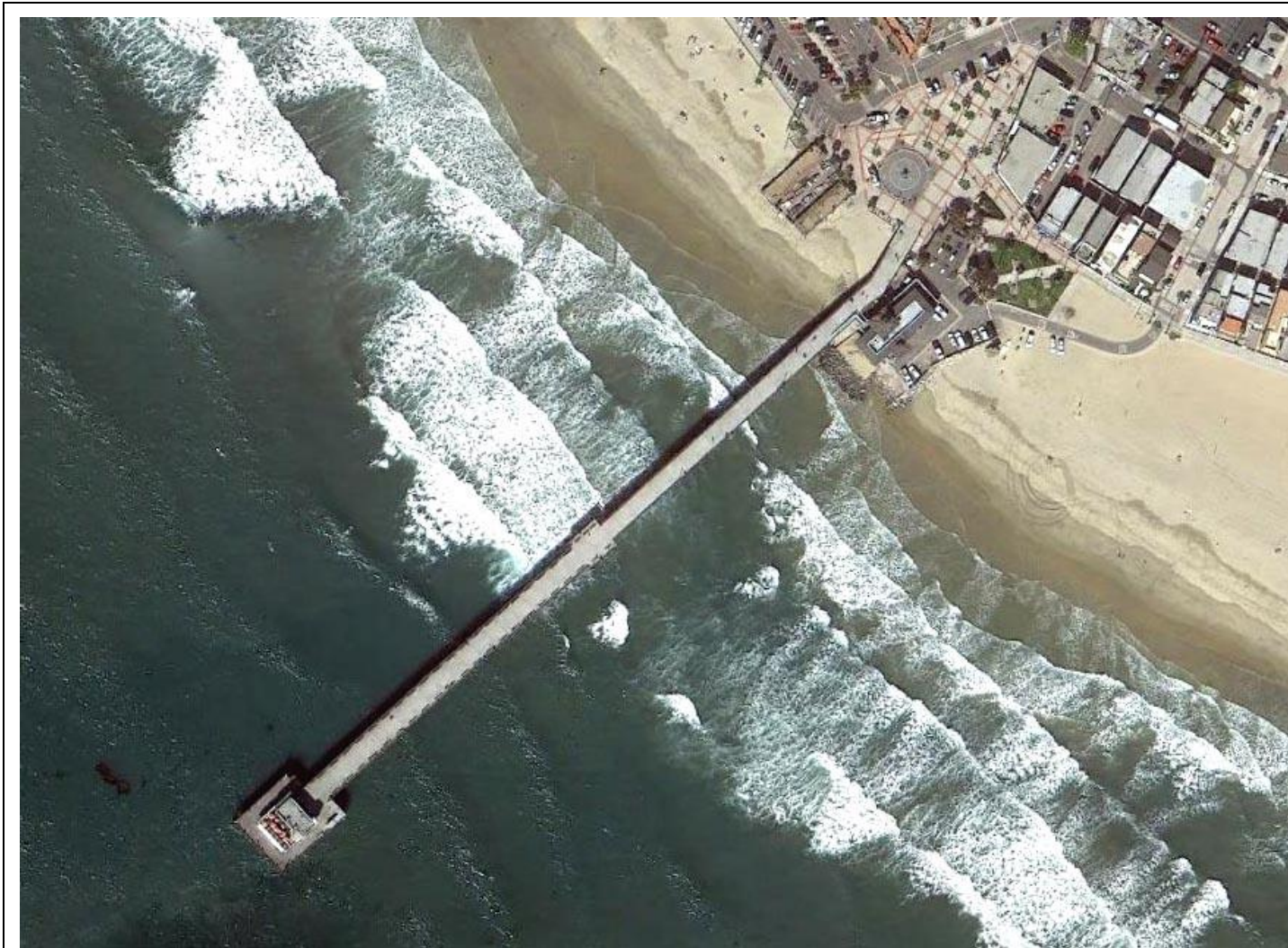


Figure 1
NEWPORT PIER



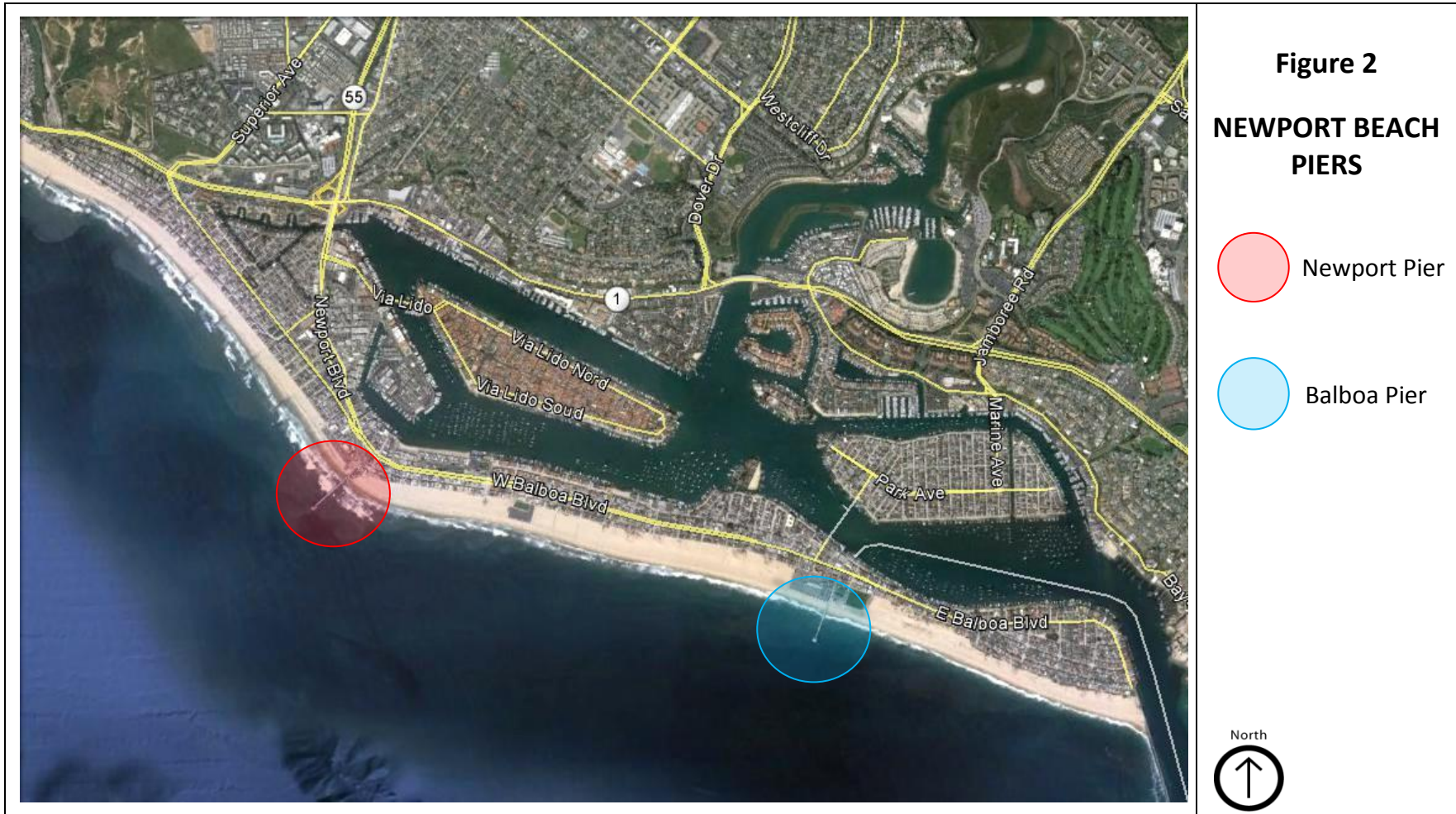




Figure 3

PHOTOS OF NEWPORT PIER

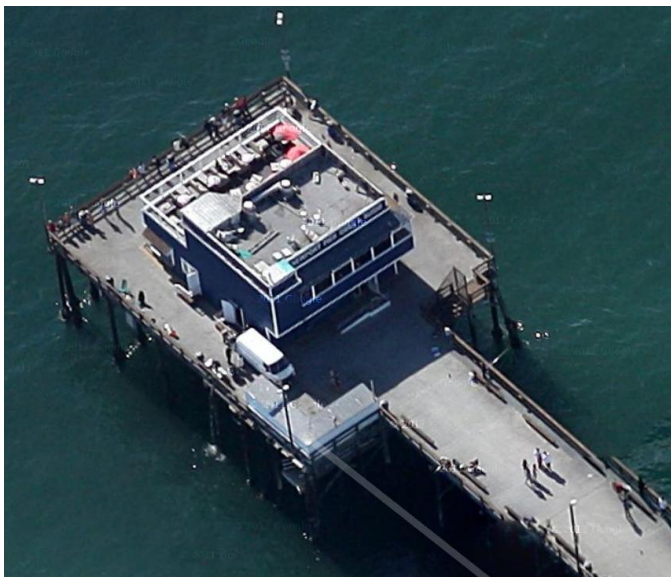




Figure 4
PHOTOS OF NEWPORT PIER



In order to assess the economic conditions, the GRC team collected, reviewed and analyzed demographic, market and recent retail sales data and information within a one-quarter mile radius (generally considered to be a comfortable walking distance) of comparable piers. For some of the piers used in the analysis, GRC obtained this information from the cities in which the piers are located. Based on the market analysis, the highest and best use of the Newport pier space was determined.

The businesses were categorized by North American Industry Classification System (“NAICS”) codes. NAICS codes are the standard business classifications used by Federal and State agencies in classifying business establishments for the analysis of statistical data describing the economy.

GRC tabulated and analyzed information collected from the State, County and City sources as well as the survey of 43 piers statewide. Information used in the analysis includes general socioeconomic and demographic data, retail rents and vacancies, and sales by retail categories. Sources used to estimate the revenue of businesses included the California State Board of Equalization, taxable sales figures provided by cities, and estimates from other industry sources.

In order to calculate demand for retail businesses that may be located on piers, GRC researched known per-capita consumer spending on retail and other goods and services. Sources that provide this kind of data include the California State Board of Equalization, US Census Bureau, Nielsen Site Reports, Department of Finance, and others.

II. Retail Analysis

Overview of California Piers

GRC staff assessed over 40 publicly accessible piers in California, from the Imperial Beach pier a few miles from the Mexican border to the piers located along the Embarcadero waterfront in San Francisco. Information was collected for each pier and summarized in this study. **Figure 5** shows the location of the various California piers surveyed. **Appendix A (Table 1)**, which is at the end of this study, lists key facts of each pier, including the type and length of pier, latest opening date, number of restaurants on the pier and vacancy rates. The numbers of piers, by county, are listed below:

- San Francisco County: 8 piers
- San Mateo County: 1 pier
- Santa Cruz County: 2 piers
- Monterey County: 2 piers
- San Luis Obispo County: 6 piers
- Santa Barbara County: 2 piers
- Ventura County: 2 piers
- Los Angeles County: 9 piers

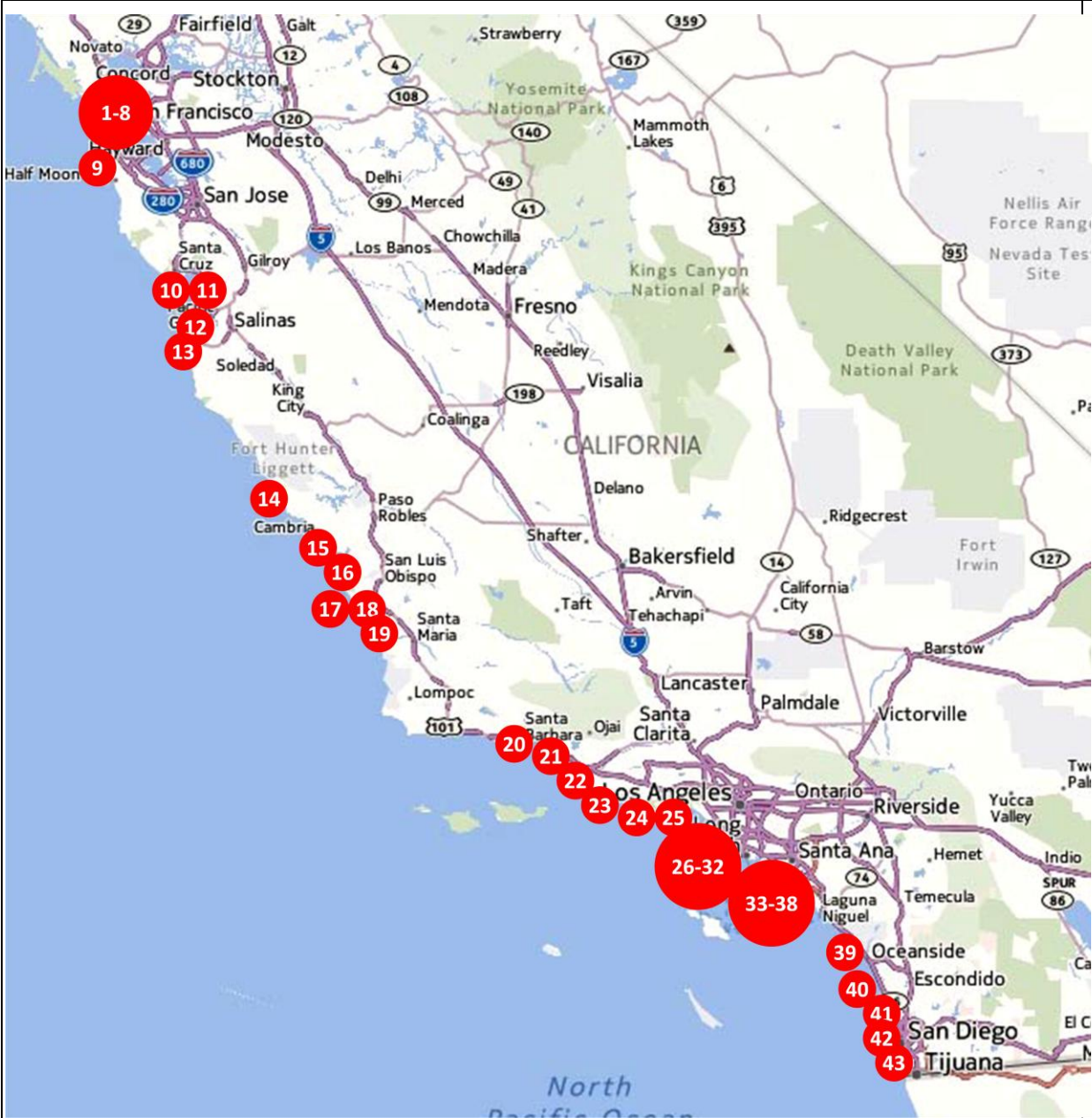
- Orange County: 6 piers
- San Diego County: 5 piers

An analysis was completed regarding the primary characteristics of each pier. **Appendix A (Table 2)** presents the 43 piers categorized by major category. About one-third of the piers (14 of 43) did not have any retail establishments and were primarily recreational fishing or pedestrian piers.

Another one-third of the piers had one or more restaurants either at the base of the pier or at the end of the pier. Restaurants, including both full-service and fast food-type eating and drinking establishments, were the most common type of business located on piers. **Appendix A (Table 3)** lists the names of all restaurants located either at the end or at the base of the piers. Eleven (11) piers had restaurants at the end of the pier and the others had restaurants at the base of the pier. In Orange County, four piers (Newport, Balboa, Seal Beach and Huntington Beach) had restaurants at the end of the pier, with the San Clemente Pier having a restaurant at its base. In Huntington Beach, there is also a restaurant, Duke's that is near the base of the pier and Ruby's at the end of the pier. Currently, the restaurant buildings at the end of the Newport and Seal Beach piers are vacant.

Eight other piers assessed for this study and not mentioned in the preceding paragraph also have restaurants, though are categorized as "dining, shopping and entertainment destination" piers. These piers, which include Fisherman's Wharf Pier 39 in San Francisco, Stearns Wharf in Santa Barbara and the Santa Monica Pier, all have numerous stores and other attractions such that the piers themselves are primary destinations.

Figure 5
CALIFORNIA PIERS SURVEYED



- | | |
|-------------------------------------|----------------------------|
| 1 SF Pier 47 | 33 Seal Beach |
| 2 SF Pier 43/45 | 34 Huntington Beach |
| 3 SF Pier 39 | 35 Newport |
| 4 SF Pier 15/17 | 36 Balboa |
| 5 SF Pier 7 | 37 Dana Harbor |
| 6 SF Pier 2 | 38 San Clemente |
| 7 SF Pier 28 | 39 Oceanside |
| 8 SF Pier 14 | 40 Scripps (La Jolla) |
| 9 Pacifica | 41 Crystal (San Diego) |
| 10 Santa Cruz | 42 Ocean Beach (San Diego) |
| 11 Sea Cliff (Aptos) | 43 Imperial |
| 12 Monterey | |
| 13 Old Fisherman's Wharf (Monterey) | |
| 14 San Simeon | |
| 15 Los Cayucos | |
| 16 Harford Pier | |
| 17 Cal Poly (Avila Beach) | |
| 18 Avila | |
| 19 Pismo Beach | |
| 20 Goleta | |
| 21 Stern's (Santa Barbara) | |
| 22 Ventura Co. | |
| 23 Port Hueneme | |
| 24 Paradise Cove (Malibu) | |
| 25 Malibu | |
| 26 Santa Monica | |
| 27 Venice | |
| 28 Manhattan Beach | |
| 29 Hermosa Beach | |
| 30 Redondo Beach | |
| 31 Cabrillo (San Pedro) | |
| 32 Belmont (Long Beach) | |



Of the 43 piers reviewed, a few include unique uses other than restaurants. For example, the Manhattan Beach Pier has an aquarium at the end of the pier; the Crystal Pier in Pacific Beach has rental cabins on the pier; and there are two piers that are exclusively used for university research purposes (University of California at San Diego, Scripps Pier in La Jolla and the Cal Poly Marine Science Pier located in the San Luis Bay near Avila Beach in San Luis Obispo County). A commercial fishing pier (Monterey Municipal Wharf 1) had a few businesses open to the public.

Vacancy data was also gathered for each pier, although, there were very few vacancies. In addition to the Newport Pier, business vacancies were observed at the Seal Beach, Malibu and Harford piers. Ruby's Diner recently closed its establishments at both the Seal Beach and Malibu locations. At the Seal Beach Pier, Ruby's Diner had a lease agreement dispute with the City of Seal Beach and vacated the premises after being there for 25 years. Ruby's Diner also moved out of the Malibu location because of lack of consistent revenues. However, in early August 2013, another restaurant operator was in the process of opening a new restaurant at the Malibu Pier. The Harford Pier in San Luis Obispo County had a vacant restaurant space located in the middle of the pier. A café located at this pier just closed after the summer season.

Retail Sales – State, County and City

GRC reviewed retail sales in order to assess demand. **Table A** on the following page lists the per capita taxable retail sales by North American Industry Classification System (NAICS) categories for California, Orange County and the City of Newport Beach. In general, Newport Beach has a large surplus of businesses in almost all retail categories. Total per capita retail sales in Newport Beach in 2011 was \$20,785, more than double the State's per capita retail sales figure of \$9,463 and significantly higher than Orange County's \$11,679 per capita figure. The top three retail categories in Newport Beach, highlighted in Table A below, include motor vehicles and parts dealers, restaurants and clothing stores. The only retail sector that Newport Beach's sales are lower than the state and county averages is the building materials category. Countywide, the average per capita spending on building materials was \$744, as compared to \$533 in Newport Beach.

Newport Beach's per capita figure is relatively high due to the City's regional attraction as a tourist and shopping destination. Visitors from all over come to Newport Beach for its pristine beaches and to shop and dine, especially at regional retail centers such as Fashion Island and the numerous full-service restaurants located throughout the City. According to the Newport Beach Conference and Visitors Bureau, visitors to Newport Beach spend approximately \$1.0 billion per year in taxable retail sales, which is approximately one-half of the City's total taxable retail sales.

Table A
Summary of Per Capita Taxable Retail Sales - 2011

NAICS Retail Category	California	Orange County	City of Newport Beach
Motor Vehicle and Parts Dealers	\$1,419	\$1,896	\$5,863
Food Services and Drinking Places	1,457	1,788	4,619
Clothing and Clothing Accessories Stores	788	1,039	2,752
General Merchandise Stores	1,283	1,566	1,987
Gasoline Stations	1,470	1,584	1,667
Food and Beverage Stores	628	653	1,174
Bldg. Matrl. and Garden Equip. and Supplies	694	744	533
Furniture and Home Furnishings Stores	247	298	505
Electronics and Appliance Stores	381	761	*
Health and Personal Care Stores	274	293	*
Sporting Goods, Hobby, Book, and Music Stores	282	361	*
Miscellaneous Store Retailers	457	544	*
Nonstore Retailers	82	151	*
Total Per Capita Retail Sales	\$9,463	\$11,679	\$20,785

* Data not available due to small sample size and confidentiality-Source: State Board of Equalization, August 2013

Demographic Analysis and Retail Sales — One-Quarter Mile of Piers

GRC completed additional research of demographic and retail sales within one-quarter mile (considered a comfortable walking distance) from the base of the piers were included in the study. Of the 43 piers reviewed, GRC selected 13 piers that were comparable to the Newport Beach pier, including all five (5) piers located in Orange County (Newport, Balboa, Huntington Beach, Seal Beach, and San Clemente). The list of selected piers also included three (3) piers in Los Angeles County (Manhattan Beach, Malibu, and Santa Monica), three (3) piers in San Diego County (Oceanside, Ocean Beach, and Imperial Beach), the Pismo Beach Pier in San Luis Obispo County, and the Pacifica Municipal Pier in San Mateo County. **Appendix A (Tables 5, 6 and 7)** at the end of this study, show key demographic data for each pier, including population, race-ethnicity, median age, median household income and average household size by one-quarter mile radius, one-mile radius and three-mile radius from the base of the pier. In summary,

Newport Beach households have median household incomes of \$105,405 (Newport Pier), and \$79,717 (Balboa Pier) within one-quarter miles (walking distance), \$109,405 (Newport Pier), and \$87,009 (Balboa Pier) within one mile, and \$70,628 (Newport) and \$87,391 (Balboa) within a three mile radius of piers. Also, in Newport Beach there are smaller household sizes within one-quarter miles relative to residents within a one-mile and three-mile radius of the pier.

Retail sales by key category within one-quarter mile of each of the 13 selected piers are presented in **Appendix A (Table 8)** at the end of this study. Because of confidentiality and the lack of a significant number of establishments, specific sales information could not be provided for every pier. Within a one-quarter mile radius of the pier, a significant proportion of businesses tend to be restaurants. **Table B** below summarizes the average annual taxable sales per store of the 13 selected piers. It also shows that restaurants, compared to other major retail categories, have the highest average annual taxable sales (\$911,092) per store.

Table B
Summary of Major Retail Categories
One-Quarter Mile Radius of the 13 Selected Piers

Major Retail Category	Number of Retail Stores	Average Annual Taxable Sales Per Store
Restaurants	305	\$911,092
Food Stores	42	\$727,036
General Merchandise	5	\$511,280
Apparel	166	\$371,163
Other Retail	543	\$169,571
Furniture and Appliances	68	\$75,281
Total Retail	1,129	\$432,398

Source: GRC Associates, Inc., September 2013

Table C below summarizes the average annual taxable sales per store within a one-quarter mile radius of the two piers located in City of Newport Beach. It shows that restaurants’ sales in the vicinity of the Newport Pier averaged \$1,246,750 per store and \$408,317 per store in the vicinity of the Balboa Pier -- both significantly higher than any other major retail category.

Table C
Summary of Major Retail Categories
One-Quarter Mile Radius of the Two Newport Beach Piers

Major Retail Category	Newport Pier		Balboa Pier	
	Number of Retail Stores	Average Annual Taxable Sales Per Store	Number of Retail Stores	Average Annual Taxable Sales Per Store
Restaurants	20	\$1,246,750	30	\$408,317
Apparel	9	\$193,156	14	\$132,007
Food Stores	*	*	4	\$308,375
Furniture and Appliances	*	*	*	*
General Merchandise	*	*	*	*
Other Retail	20	\$166,050	36	\$226,886
Total Retail	49	\$612,131	84	\$279,756

* Data not available due to small sample size and confidentiality
Source: GRC Associates, Inc., September 2013

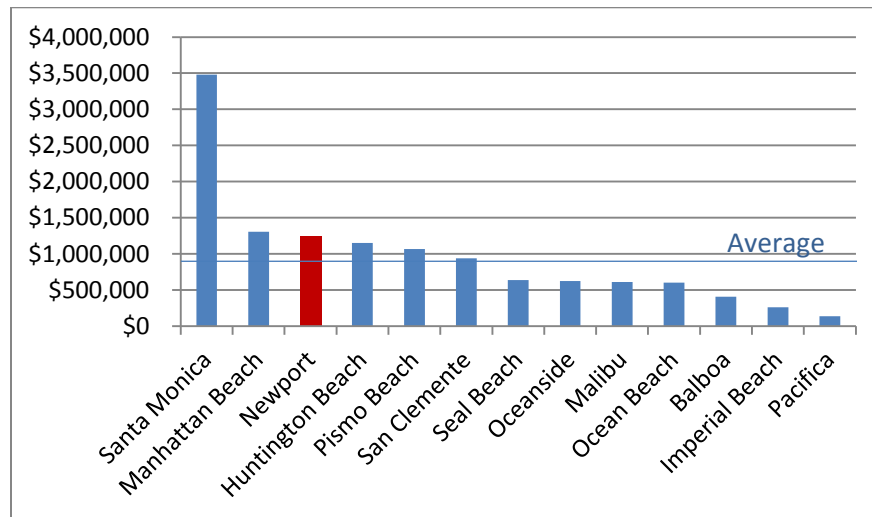
Table D and Figure 6 below present the number of restaurants and the average annual taxable sales per restaurant located within one-quarter mile of each of the 13 selected piers. The sales per restaurant are highest among those in the vicinity of Santa Monica Pier at approximately \$3.48 million per restaurant. This is followed by Manhattan Beach Pier at approximately \$1.30 million and Newport Pier at approximately \$1.24 million. Balboa Pier is 11th among the 13 piers with average annual sales of approximately \$400,000 per restaurant in its vicinity.

Table D
Average Annual Taxable Sales Per Restaurant
One-Quarter Mile Radius of the 13 Selected Piers

Piers	Number of Restaurants	Average Annual Taxable Sales Per Restaurant
Santa Monica Pier	7	\$3,480,171
Manhattan Beach Pier	51	\$1,304,125
Newport Pier	20	\$1,246,750
Huntington Beach Pier	43	\$1,151,772
Pismo Beach Pier	16	\$1,068,863
San Clemente Pier	16	\$938,950
Seal Beach Pier	19	\$635,895
Oceanside Pier	27	\$626,715
Malibu Pier	7	\$611,029
Ocean Beach Pier	52	\$600,360
Balboa Pier	30	\$408,317
Imperial Beach Pier	11	\$259,818
Pacifica Pier	6	\$136,450
Average		\$926,637

Source: Secondary information compiled by GRC Associates, Inc., September 2013

Figure 6
Average Annual Taxable Sales Per Restaurant
One-Quarter Mile Radius of the 13 Selected Piers



Source: Secondary information compiled by GRC Associates, Inc., September 2013

Table E below, presents the two types (full-service and self-service) of restaurants located at the 13 selected piers. The majority (60%) are full-service restaurants, which is typically defined as eating and drinking establishments that patrons are served at their tables. Self-service restaurants are those where customers order and pick up their own food -- fast-food restaurant are included in this category.

Table E
Restaurant Types at 13 Selected Piers

Piers	Number of Full-Service Restaurants	Number of Self-Service Restaurants
Santa Monica Pier	7	7*
Manhattan Beach Pier	0	1
Newport Pier (vacant space)	0	0
Huntington Beach Pier	2	0
Pismo Beach Pier	0	0
San Clemente Pier	1	0
Seal Beach Pier (vacant space)	0	0
Oceanside Pier	1	0
Malibu Pier	2	0
Ocean Beach Pier	1	0
Balboa Pier	1	0
Imperial Beach Pier	0	1
Pacifica Pier	0	1
Total (% of Total)	15 (60%)	10 (40%)

* Seven self-serve restaurants in one food court

Source: Survey conducted by GRC Associates, Inc., August-September 2013

Retail Space Available for Lease

In general, the Orange County retail market is strengthening as shown by the recent downward trend in vacancy rates. According to Voit Real Estate Services, over the previous six quarters, Orange County has posted consecutive positive net absorption rates. The countywide retail vacancy rate for the second quarter of 2013 was 5.54 percent, which was less than the annual rate of 6.09 percent for the previous year (2012). Retail vacancy rates in Newport Beach tend to be lower than countywide averages and are generally in the two percent range. According to Voit Services, as vacancy rates decline in Orange County, asking lease rates should begin to stabilize and start to increase. Countywide, asking lease rates are currently averaging \$1.82 per square foot per month. In Newport Beach, asking retail lease rates were \$2.78 per square foot per month, or \$33.36 per square foot per year.

Additional research of the Newport Beach retail market was conducted to determine the relative strength of the restaurant space sub-market. **Appendix A (Table 9 and Figure 1)** lists all retail space available for lease in Newport Beach and their location, respectively. The properties that are located near the piers are highlighted in **Appendix A (Table 9)**. Below is a list of retail space available for lease near other piers in southern California:

- Balboa Pier: Two retail spaces available near the pier — a) 514 E. Oceanfront/Boardwalk, asking price of \$2.95 to \$4.50 per square foot per month; and b) 303 Main Street, asking price of \$2.80 per square foot per month. In general, locations closer to the ocean demand a higher rental fee.
- Seal Beach Pier: One restaurant space available at end of pier (previously occupied by Ruby's Diner) was renting for an estimated \$5,000 to \$10,000 per month. Specific figure was not made available.
- Malibu Pier: One retail space near the pier at 22969 Pacific Coast Highway is available for \$6.00 per square foot per month.
- Manhattan Beach Pier: One space available near the pier at 213 Manhattan Beach Boulevard is asking for \$7.50 per square foot per month.
- Long Beach Belmont Memorial Pier: One restaurant space located two blocks from pier at 4100 E. Ocean is available for lease at \$1.50 per square foot per month.
- Oceanside Pier: Two retail spaces currently available near the pier — a) 401 N. Coast Hwy, asking \$3.00-\$3.25 per square foot per month, and b) 316 Mission--rental information is not available.

Newport Pier Restaurant Space

The Newport Pier has a vacant space at the end of the pier that was previously used as a restaurant. The existing building is approximately 4,055 square feet and includes approximately 1,667 square feet on the first floor and approximately 2,388 square feet on the roof deck. Base rent for this space was \$2,000 per month, which was adjusted for percentage rent of seven percent of gross sales. In the last full year (2011) for which

sales data is available, the restaurant's sales were approximately \$910,000, which almost equals the average for restaurants located within one-quarter mile of piers reviewed.

It is reasonable to expect that with an improved economy and a new restaurant operator — preferably a credit tenant — a future full-service restaurant at the unique pier location would have annual taxable sales of approximately \$1.2 to \$1.6 million or \$300 to \$400 per square foot. The potential sales generated at the Newport Pier restaurant are comparable to sales of typical restaurants of the same size, which have taxable sales ranging from \$1.1 to \$2.3 million or \$250 and \$575 per square foot per year. Assuming that rent is based on seven percent of gross sales and assuming annual sales of \$1.6 million, a restaurant at the end of Newport Pier would pay a monthly rent of approximately \$9,300 or \$112,000 per year.

It should be noted that other restaurants on piers in southern California have sales significantly higher than GRC's Newport Pier forecast of \$1.2 to \$1.6 million per year. For example, the restaurant at the base of San Clemente Pier pays the City of San Clemente approximately \$500,000 per year in rent (their lease is at 6% of sales), which calculates to annual sales revenue of \$8.3 million. Average sales of restaurants at the Santa Monica Pier average \$3.5 million per year. In general, credit-tenant restaurants have sales significantly higher than the projected sales of the Newport Pier restaurant.

III. Highest and Best Use

Based on the data gathered and current market conditions, the highest and best use for the vacant space at the end of the Newport Pier is a restaurant. A restaurant at the Newport Pier site has the potential to generate approximately \$1.2 to \$1.6 million in annual sales with an annual rent payment as high as \$112,000 to the City of Newport Beach. If liquor sales are allowed at this restaurant, the City could negotiate a higher percentage of sales, similar to terms for pier restaurants in Santa Cruz, perhaps 10 percent of liquor sales and, thus, increasing revenues paid to the City. These projections are reasonable given sales at comparable restaurants near piers and the general strengthening of Orange County's economy.

A restaurant at the end of Newport Pier should thrive, as it will capture a market generated by the people visiting the City's clean beaches, restaurants and other amenities. The City is a major regional attraction; it has been estimated that almost 10 million people visit Newport Beach each year. During the summer months, the City's population increases on an average of 30,000 to 50,000 people and, on some weekends, the figure approaches 125,000 visitors per day. Even though Newport Beach's public beaches are used extensively, the beaches are maintained in pristine condition. Heal the Bay, a non-profit organization dedicated to cleaning beaches, has given the two beaches near the Newport and Balboa piers the grade of "A+", the highest possible. Although there are numerous restaurants in the City, the demand is high for a restaurant at a unique location near the beach with sunset views.

Appendix A

Table 1
California Piers
San Francisco, San Mateo, Santa Cruz, Monterey, San Luis Obispo, Santa Barbara, Ventura, Los Angeles, Orange and San Diego Counties

Num.	Pier	County	Length (Feet)	Latest Pier Opened	Restaurants	Vacancy	Type of Pier - Notes
1	Pier 47	SF	1,000		3	0%	Three restaurantson pier with parking and two restaurants at base
2	Fisherman's Wharf (Pier 43 and 45)	SF			7		Major tourist attraction includes
3	Pier 39	SF	1,100	1978	14	0%	Major tourist attraction with over 90 shops
4	Pier 15/17	SF	800	2013	2	0%	Exploratorium -- science learning campus and museum
5	Pier 7	SF	840	dedicated 1990	1	0%	Concrete pier with wood boardwalk -- recreational fishing and walking with lampposts, furniture
6	Pier 2	SF			1	0%	Circular pier next to Ferry Terminal
7	Pier 28	SF			1		Industrial use -- currently used as part of America's Cup
8	Pier 14	SF	700	dedicated 2006	0	0%	Concrete L-shaped. Recreational fishing and walk pier. No lightlamps, no restaurants. Clean
9	Pacifica Municipal Pier	San Mateo	1,140	1973	1	0%	Cement L-shaped. Used for recreational fishing. One café at base of pier selling coffee and deli.
10	Santa Cruz Wharf	Santa Cruz	2,745	1914	8	0%	Wooden. Longest pier (any type) in Calif.
11	Sea Cliff State Park Pier, Aptos	Santa Cruz	500		0	N/A	Wooden. Unique, decaying ship (the Palo Alto) at end of pier.
12	Monterey Municipal Wharf 2	Monterey			2	0%	Cement Pier, mostly commercial businesses on pier.
13	Old Fisherman's Wharf	Monterey	750+	1870	14	0%	Many restaurants and other
14	San Simeon Pier	San L. O.	850	1983	0	N/A	Wooden, fishing pier, near Hearst Castle
15	Los Cayucos Pier	San L. O.	953	1875	0	N/A	Wooden. There is an unsafe, blocked off section at end of pier
16	Harford Pier	San L. O.	1,320	1878	2	33%	Wooden. Pier has many recreational options, includnig fishing and boating.
17	Cal Poly Pomona Pier, Avila Beach	San L. O.	2,640	1984	0	N/A	Concrete. Unocal donated pier to Cal Poly.
18	Avila Pier, Port San Luis, Avila Beach	San L. O.	1,685	1908	0		Wooden. There is just a bait and snack shop on pier.
19	Pismo Beach Pier	San L. O.	1,250	1986	0		Wooden. Just a bait and snack shop on pier.
20	Goleta Pier	S. Barb.	1,450	1980s	0	0%	Wooden - Just a small bait shop at pier
21	Stern's Wharf	S. Barb.	1,950	1872	6	0%	Wooden - Santa Barbara County
22	Ventura County Pier	Ventura	1,620	1996	2	0%	Wooden, with new steel pilings, originally 1,958 feet long
23	Port Hueneme Pier	Ventura	1,400	1999	0	N/A	Wooden
24	Paradise Cove Pier, Malibu	LA			0	0%	Concrete, small historical pier
25	Malibu Pier	LA	780	2003	2	0%	Wooden
26	Santa Monica Pier	LA	1,080	1988	14	0%	Wooden
27	Venice Pier	LA		1923		N/A	Concrete - primarily a fishing pier
28	Manhattan Beach Pier	LA	928	1920	1	0%	Concrete
29	Hermosa Beach Pier	LA	1,000	1914	0	0%	Concrete
30	Redondo Beach Pier	LA			19	0%	
31	Cabrillo Pier, San Pedro	LA	1,200	1988	0	N/A	Concrete
32	Long Beach Belmont Memorial Pier	LA			1		
33	Seal Beach Pier	Orange	1,835	1995	0	100%	Wooden
34	Huntington Beach Pier	Orange	1,856	1992	2	0%	Concrete
35	Newport Beach Pier	Orange	1,322	1890			Wooden
36	Balboa Pier, Newport Beach	Orange	920	1906	1		Wooden
37	Dana Harbor Pier	Orange	150	1988	0	N/A	Wooden
38	San Clemente Pier	Orange	1,296	1985	1		Wooden
39	Oceanside Pier	SD	1,942	1987	1		Wooden
40	Scripps Pier, La Jolla	SD	1,090	1988	0	N/A	Concrete -(Private, research pier)
41	Crystal Pier, San Diego	SD	872	1936	0	0%	Wooden - Has sleeping, rental cabins over the water
42	Ocean Beach Pier, San Diego	SD	1,971	1966	1	0%	Concrete - Longest in Southern California
43	Imperial Beach Pier	SD	1,491	1963	1	0%	Concrete

**Table 2
Piers by Primary Category**

Num.	Pier / Wharf	Full-Service Restaurant at end of pier (A)	Self-Serve Restaurant at end of pier (B)	Full-Service Restaurant at base of pier (C)	Fishing Pier (D)	Dining, Shopping & Entertaining Center (E)	Aquarium (F)	Research/ University (G)	Hotel (H)	Industrial - Commercial Fishing (I)	Comments
1	Pier 47	x									
2	Fisherman's Wharf (Pier 43 and 45)					x					
3	Pier 39					x					
4	Pier 15/17					x					
5	Pier 7				x						
6	Pier 2			x							
7	Pier 28									x	
8	Pier 14				x						
9	Pacifica Municipal Pier			x							
10	Santa Cruz Wharf					x					Numerous restaurants
11	Sea Cliff State Park Pier				x						Sunken ship at end of pier
12	Monterey Municipal Wharf (1)									x	Two restaurants + wholesale-retail seafood business
13	Monterey Old Fisherman's Wharf (2)					x					Numerous restaurants
14	San Simeon Pier				x						Near Hearst Castle
15	Los Cayucos Pier				x						Section at end is closed-dangerous
16	Harford Pier	x									Two restaurants, Olde Port and Fat Cats near base of pier
17	Cal Poly Marine Science Pier							x			Closed to public
18	Avila Pier				x						Bait and snack shop
19	Pismo Beach Pier				x						Bait and snack shop
20	Goleta Pier				x						Bait shop
21	Santa Barbara Stearns Wharf					x					Also has an Aquarium
22	Ventura Pier			x							Two restaurants at beginning of pier
23	Port Huenembe Pier				x						
24	Paradise Cove, Malibu				x						
25	Malibu Pier	x									Restaurant and Gift shop at end of pier, and a restaurant at beginning of pier
26	Santa Monica Pier			x		x					Numerous restaurants + amusement park
27	Venice Pier				x						
28	Manhattan Beach Pier						x				
29	Hermosa Beach Pier				x						
30	Redondo Beach Pier					x					Numerous restaurants
31	Cabrillo Pier				x						Aquarium nearby
32	Long Beach Belmont Pier	x									Restaurant was closed for health violations
33	Seal Beach Pier	x									Vacant restaurant (old Ruby's Diner)
34	Huntington Beach Pier	x									Ruby's at end of pier and Duke's near base of pier
35	Newport Pier	x									Vacant restaurant at end of pier
36	Balboa Pier	x									Ruby's at end of pier
37	Dana Point				x						
38	San Clemente Pier			x							Fisherman's Restaurant
39	Oceanside Pier	x									Ruby's at end of pier
40	Scripps - UCSD Pier							x			Pier closed to public
41	Crystal Pier								x		Cabins at beginning of pier
42	Ocean Beach Pier	x									Wow Café located near end of pier
43	Imperial Beach Pier		x								The Tin Fish Restaurant at end of pier
43	Total Piers	10	1	6	14	8	1	2	1	2	
	Percent of Total	23.3%	2.3%	14.0%	32.6%	18.6%	2.3%	4.7%	2.3%	4.7%	

Source: GRC Associates, Aug. 2013

Table 3
Restaurants on California Piers
San Francisco, San Mateo, Santa Cruz, Monterey, San Luis Obispo, Santa Barbara, Ventura, Los Angeles, Orange and San Diego Counties

Num.	Pier	Length (Feet)	Latest Pier Opened	Full-Service Restaurants	Self-Service Restaurants	Vacancy	Type of Pier - Notes
San Francisco County							
1	Pier 47 A. Scoma Restaurant on Al Scoma Way (on pier) B. Lou's Pier 47 (base) C. Castagnola's (base)	1,000			1 1 1	0%	
2	Fisherman's Wharf (Pier 43 and 45) A. Alioto's B. Sabell/La Torre C. Nick's Lighthouse D. No. 9 Fisherman's Grotto E. Chowder Hut Fresh Grill F. Boudin at the Wharf G. Franciscan Crab Restaurant				1 1 1 1 1 1 1		Major tourist attraction includes
3	Pier 39 A. Bubba Gumps Shrimp Co. B. Crab House C. Eagle Café D. Fog Harbor Fish House E. Forbes Island F. Hana Zen Japanese Grill and Sushi Bar H. Hard Rock Café I. Luigi's Pizzeria J. Mango's Taqueria and Cantina K. Neptune's Waterfront Grill and Bar L. Pier Market M. Players Sports Grill and Arcade N. Swiss Louis Italian and Seafood Restaurant O. Wipeout Bar and Grill	1,100	1978		1 1 1 1 1 1 1 1 1 1 1 1 1 1	0%	Major tourist attraction with over 90 shops
4	Pier 15/17 Exploratorium Museum Café Seaglass Restaurant (full-service)	800	2013		1 1	0%	Exploratorium -- science learning campus and museum
5	Pier 7 Coqueta (base, full-service)	840	dedicated 1990		1	0%	Concrete pier with wood boardwalk -- recreational fishing and walking with lampposts, furnature
6	Pier 2 A. Simbad's Pier 2 (on pier)				1	0%	Circular pier next to Ferry Terminal
7	Pier 28 A. Red's Java House (base)					1	Industrial use -- currently used as part of America's Cup
8	Pier 14	700	dedicated 2006	0	0	0%	Concrete L-shaped. Recreational fishing and walk pier. No lighttamps, no restaurants. Clean
San Mateo County							
9	Pacifica Municipal Pier A. Chit-Chat Café, 5 W. Manor Dr., Pacifica, CA 94044	1,140	1973			1	0% Cement L-shaped. Used for recreational fishing. One café at base of pier selling coffee and deli.
Santa Cruz County							
10	Santa Cruz Wharf A. Dolphin Restaurant, 71 Municipal Wharf B. Stagnaro Restaurant, 59 Municipal Wharf C. Olitas, 49-B Municipal Wharf D. Miramar Restaurant, 45 Municipal Wharf E. Gilda's, 37 Municipal Wharf F. Riva Fish House, 31 Municipal Wharf G. Gilbert's Firefish Grill, 25 Municipal Wharf H. Woodies Café, 25-B Municipal Wharf	2,745	1914		1 1 1 1 1 1 1 1	0%	Wooden. Longest pier (any type) in Calif.

Table 3
Restaurants on California Piers
San Francisco, San Mateo, Santa Cruz, Monterey, San Luis Obispo, Santa Barbara, Ventura, Los Angeles, Orange and San Diego Counties

Num.	Pier	Length (Feet)	Latest Pier Opened	Full-Service Restaurants	Self-Service Restaurants	Vacancy	Type of Pier - Notes
11	Sea Cliff State Park Pier, Aptos	500		0	0	N/A	Wooden. Unique, decaying ship (the Palo Alto) at end of pier.
Monterey County							
12	Monterey Municipal Wharf A. Lou Lous Griddle in the Middle, Wharf No. 2, Monterey B. Sandbar and Grill, Wharf No. 2, Monterey			1 1		0%	Cement Pier, mostly commercial businesses on pier.
13	Old Fisherman's Wharf A. Abalonetti Bar and Grill, 57 Old Fisherman's Wharf No. 1 B. Café Fina, 47 Old Fisherman's Wharf No. 1 C. Coffee House, 68 Old Fisherman's Wharf No. 1 D. Crabby Jim's, 25 Old Fisherman's Wharf No. 1 E. Crab Louie's, 46 Old Fisherman's Wharf No. 1 F. Domenico's on the Wharf, 50 Old Fisherman's Wharf No. 1 G. Liberty Fish Company, 43 Old Fisherman's Wharf No. 1 H. Gilbert's Seafood Grill, 30 Old Fisherman's Wharf No. 1 I. Isabella's Italian Food, 60 Old Fisherman's Wharf No. 1 J. The Grotto Fish Market, 42 Old Fisherman's Wharf No. 1 K. Old Fisherman's Grotto, 39 Old Fisherman's Wharf No. 1 L. Paluca Trattoria, 6 Old Fisherman's Wharf No. 1 M. Rappa's Seafood Restaurant, 101 Old Fisherman's Wharf No. 1 N. Crepes of Brittany, 6B Old Fisherman's Wharf No. 1	750+	1870	1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1	1 1	0%	Many restaurants and other
San Luis Obispo County							
14	San Simeon Pier	850	1983	0	0	N/A	Wooden, fishing pier, near Hearst Castle
15	Los Cayucos Pier	953	1875	0	0	N/A	Wooden. There is an unsafe, blocked off section at end of pier
16	Harford Pier A. Olde Port Inn, 3993 Avila Beach Dr. B. Vacant Café Space C. Fat Cats Restaurant, 3920 Avila Beach Dr.	1,320	1878	1 1		33%	Wooden, fishing, boating pier, accessible by car Full-service, glass-table restaurant, accessible to cars, with parking on-site Restaurant located near base of pier
17	Cal Poly Pomona Pier, Avila Beach	2,640	1984	0	0	N/A	Concrete. Unocal donated pier to Cal Poly.
18	Avila Pier, Port San Luis, Avila Beach	1,685	1908	0	0		Wooden. There is just a bait and snack shop on pier.
19	Pismo Beach Pier	1,250	1986	0	0		Wooden. Just a bait and snack shop on pier.
Santa Barbara County							
20	Goleta Pier	1,450	1980s	0	0	0%	Wooden - Just a small bait shop at pier
21	Stern's Wharf A. Char West 221 Stearn's Warf B. Great Pacific Ice Cream Co. 219 Stearns Warf C. Harbor Restaurant 210 Stearn's Warf D. Longboards Grill 210 Stearn's Warf E. Moby Dick Restaurant 220 Stearn's Warf F. Santa Barbara Shellfish Company 230 Stearn's Warf	1,950	1872	1 1 1 1 1 1	1	0%	Wooden - Santa Barbara County
Ventura County							
22	Ventura County Pier A. Eric Ericson's 668 E Harbor Blvd, Ventura B. Beach House Tacos, 443 E. Harbor Blvd. Ventura	1,620	1996	1 1		0%	Wooden, with new steel pilings, originally 1,958 feet long
23	Port Hueneeme Pier	1,400	1999	0	0	N/A	Wooden
Los Angeles County							
24	Paradise Cove Pier, Malibu			0	0	0%	Concrete, small historical pier
25	Malibu Pier A. Restaurant under construction B. Ruby's Diner (Closed), Other Restaurant under construction	780	2003	1 1		0%	Wooden
26	Santa Monica Pier A. Pier Burger B. Bubba Gump Shrimp Co. C. Soda Jerks D. Mariasol Cocina Mexicana E. Rusty's Surf Ranch F. Pizza al Mare G. Santa Monica Pier Seafood	1,080	1988	1 1 1 1 1 1 1		0%	Wooden

**Table 3
Restaurants on California Piers
San Francisco, San Mateo, Santa Cruz, Monterey, San Luis Obispo, Santa Barbara, Ventura, Los Angeles, Orange and San Diego Counties**

Num.	Pier	Length (Feet)	Latest Pier Opened	Full-Service Restaurants	Self-Service Restaurants	Vacancy	Type of Pier - Notes
	H. Food Court: Coffee Bean & Tea Leaf I. Food Court: Harbor Grill J. Food Court: Pizza Hut Express K. Food Court: Taco Bell L. Food Court: Scoops Ice Cream and Treats M. Food Court: Funnel Cake Factory N. Food Court: Dippin' Dots					1 1 1 1 1 1 1	
27	Venice Pier		1923	0	0	N/A	Concrete - primarily a fishing pier
28	Manhattan Beach Pier A. The Round House Aquarium and Café 2 Manhattan Beach Blvd, Manhattan Beach, CA 90266	928	1920	0	1	0%	Concrete
29	Hermosa Beach Pier	1,000	1914	0	0	0%	Concrete
30	Redondo Beach Pier A. Tony's on the Pier, 210 Fishermans Wharf, Redondo Beach 90277 B. Redondo Beach Crab House, 100 Fisherman Wharf, Suite F, Redondo Beach, CA 90277 C. Pier Seafood D. Pier Express E. Pier Bakery F. Pacific Fish Center and Restaurant G. The Boiling Shrimp H. The New Starboard Attitude I. Mini Chinese Food J. Bella Gelato K. Portside Gelato L. El Torito M. El Cinco de Mayo N. Shelter O. Craig's Hot Dog on a Stick P. Charlie's Place Q. Brixton South Bay R. Neighborhood Grinds S. Kinkaid's, 500 Fishermans Wharf, Redondo Beach, CA 90277			1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1	1 1 1 1 1 1 1 1 1 1 1	0%	
31	Cabrillo Pier, San Pedro	1,200	1988	0	0	N/A	Concrete
32	Long Beach Belmont Memorial Pier A. Buoy's Restaurant			1		0%	
Orange County							
33	Seal Beach Pier A. Rubys Diner (Closed) -Actively seeking new tenant	1,835	1995	0	0	100%	Wooden
34	Huntington Beach Pier A. Ruby's 1 Main St, Huntington Beach, CA 92648 B. Duke's, 317 E. Pacific Coast Hwy, Huntington Beach, CA 92648	1,856	1992	1 1		0%	Concrete Restaurant located at end of pier. Restaurant located near base of pier.
34	Newport Beach Pier A. Vacant Restaurant Space	1,322	1890			100%	Wooden
36	Balboa Pier, Newport Beach A. Ruby's 1 Balboa Pier, Newport Beach, CA 92661	920	1906	1	0	0%	Wooden
36	Dana Harbor Pier	150	1988	0	0	N/A	Wooden
38	San Clemente Pier A. The Fisherman's Restaurant and Bar 611 Avenida Victoria, San Clemente, CA 92672	1,296	1985	1	0	0%	Wooden
San Diego County							
39	Oceanside Pier A. Ruby's 1 Oceanside Pier, Oceanside, CA 92054	1,942	1987	1	0	0%	Wooden
40	Scripps Pier, La Jolla	1,090	1988	0	0	N/A	Concrete -(Private, research pier)
41	Crystal Pier, San Diego	872	1936	0	0	0%	Wooden - Has sleeping, rental cabins over the water
42	Ocean Beach Pier, San Diego A. Ocean Beach Pier Café 5091 Niagara Ave, San Diego, CA 92107	1,971	1966	1	0	0%	Concrete - Longest in Southern California
43	Imperial Beach Pier A. The Tin Fish 910 Seacoast Dr, Imperial Beach, CA 91932	1,491	1963	0	1	0%	Concrete
				0	1		

Sources: GRC Associates, Inc., Vaughns-Calif Piers, August 2013

Table 5
Demographic Data
0.25 Miles From Piers

Description	Newport Pier		Balboa Pier		Huntinton Beach Pier		Seal Beach Pier		San Clemente Pier		Oceanside Pier	
Population	242		300		876		1,655		838		436	
Race/Ethnicity												
White	217	89.7%	277	92.3%	750	85.6%	1,451	87.7%	769	91.8%	365	83.7%
Black	2	0.8%	3	1.0%	3	0.3%	10	0.6%	3	0.4%	14	3.2%
Am. Indian	1	0.4%	1	0.3%	6	0.7%	4	0.2%	4	0.5%	4	0.9%
Asian	8	3.3%	6	2.0%	60	6.8%	89	5.4%	17	2.0%	14	3.2%
Nat. Haw.	1	0.4%	-	0.0%	2	0.2%	12	0.7%	5	0.6%	1	0.2%
Other	7	2.9%	6	2.0%	27	3.1%	42	2.5%	20	2.4%	21	4.8%
Two +	6	2.5%	5	1.7%	28	3.2%	48	2.9%	20	2.4%	19	4.4%
Total	242	100.0%	298	99.3%	876	100.0%	1,655	100.0%	838	100.0%	436	100.0%
Hispanic	23	9.5%	21	7.0%	111	12.7%	163	9.8%	120	14.3%	64	14.7%
Median Age	39.7		43.7		41.4		43.8		43.7		44.0	
Med. HH Income	\$ 105,405		\$ 79,717		\$ 71,834		\$ 72,870		\$ 70,615		\$ 43,490	
Avg. HH Size	1.92		1.86		1.88		1.81		1.97		1.78	

Description	Ocean Beach Pier		Imperial Beach Pier		Manhattan Beach Pier		Malibu Pier		Pismo Beach Pier		Pacifica Mun. Pier		Santa Monica Pier	
Population	2,190		1,596		1,464		7		307		493		847	
Race/Ethnicity														
White	1,930	88.1%	1,182	74.1%	1,349	92.1%	6	85.7%	255	83.1%	316	64.1%	644	76.0%
Black	28	1.3%	75	4.7%	8	0.5%	-	0.0%	3	1.0%	16	3.2%	90	10.6%
Am. Indian	16	0.7%	18	1.1%	1	0.1%	-	0.0%	2	0.7%	2	0.4%	4	0.5%
Asian	54	2.5%	58	3.6%	55	3.8%	-	0.0%	9	2.9%	97	19.7%	66	7.8%
Nat. Haw.	5	0.2%	10	0.6%	1	0.1%	-	0.0%	-	0.0%	2	0.4%	1	0.1%
Other	73	3.3%	148	9.3%	8	0.5%	-	0.0%	28	9.1%	24	4.9%	18	2.1%
Two +	84	3.8%	104	6.5%	42	2.9%	-	0.0%	10	3.3%	36	7.3%	24	2.8%
Total	2,190	100.0%	1,596	100.0%	1,464	100.0%	6	85.7%	307	100.0%	493	100.0%	847	100.0%
Hispanic	226	10.3%	549	34.4%	76	5.2%	-	0.0%	67	21.8%	92	18.7%	79	9.3%
Median Age	33.2		32.9		40.7		47.5		38.3		41.4		44.2	
Med. HH Income	\$ 52,717		\$ 45,442		\$ 111,989		\$ 99,441		\$ 45,625		\$ 78,236		\$ 42,270	
Avg. HH Size	1.69		2.16		2.04		2.13		1.67		2.31		1.29	

Sources: Nielsen-Claritas, GRC Associates, Inc., Aug. 2013

**Table 6
Demographic Data
1 Mile From Piers**

Description	Newport		Balboa		Huntinton Beach Pier		Seal Beach Pier		San Clemente Pier		Oceanside Pier	
Population	6,552		7,568		17,725		9,034		16,300		12,429	
Race/Ethnicity												
White	5,928	90.5%	7,102	93.8%	15,169	85.6%	7,650	84.7%	13,605	83.5%	7,786	62.6%
Black	43	0.7%	52	0.7%	110	0.6%	100	1.1%	85	0.5%	412	3.3%
Am. Indian	28	0.4%	23	0.3%	84	0.5%	35	0.4%	143	0.9%	158	1.3%
Asian	236	3.6%	180	2.4%	1,133	6.4%	571	6.3%	352	2.2%	394	3.2%
Nat. Haw.	24	0.4%	11	0.1%	53	0.3%	28	0.3%	28	0.2%	73	0.6%
Other	127	1.9%	74	1.0%	378	2.1%	258	2.9%	1,559	9.6%	3,040	24.5%
Two +	166	2.5%	126	1.7%	798	4.5%	392	4.3%	527	3.2%	565	4.5%
Total	6,552	100.0%	7,568	100.0%	17,725	100.0%	9,034	100.0%	16,299	100.0%	12,428	100.0%
Hispanic	525	8.0%	412	5.4%	1,967	11.1%	1,038	11.5%	4,231	26.0%	5,662	45.6%
Median Age	39.2		52.8		39.0		45.9		36.8		34.2	
Med. HH Income	\$ 109,405		\$ 87,009		\$ 79,914		\$ 78,583		\$ 64,581		\$ 41,301	
Avg. HH Size	2.05		1.87		2.14		2.01		2.43		2.48	

Description	Ocean Beach Pier		Imperial Beach Pier		Manhattan Beach Pier		Malibu Pier		Pismo Beach Pier		Pacifica Mun. Pier		Santa Monica Pier	
Population	16,324		9,377		19,588		1,146		3,127		11,876		27,551	
Race/Ethnicity														
White	14,433	88.4%	6,708	71.5%	17,367	88.7%	1,039	90.7%	2,779	88.9%	5,732	48.3%	21,793	79.1%
Black	211	1.3%	334	3.6%	133	0.7%	16	1.4%	20	0.6%	475	4.0%	1,230	4.5%
Am. Indian	82	0.5%	91	1.0%	30	0.2%	3	0.3%	20	0.6%	58	0.5%	96	0.3%
Asian	395	2.4%	496	5.3%	1,069	5.5%	41	3.6%	90	2.9%	3,980	33.5%	2,307	8.4%
Nat. Haw.	32	0.2%	54	0.6%	32	0.2%	3	0.3%	4	0.1%	130	1.1%	44	0.2%
Other	532	3.3%	1,106	11.8%	179	0.9%	19	1.7%	120	3.8%	711	6.0%	882	3.2%
Two +	639	3.9%	589	6.3%	778	4.0%	25	2.2%	95	3.0%	790	6.7%	1,198	4.3%
Total	16,324	100.0%	9,377	100.0%	19,588	100.0%	1,146	100.0%	3,127	100.0%	11,876	100.0%	27,551	100.0%
Hispanic	1,715	10.5%	3,491	37.2%	1,223	6.2%	68	0.9%	393	12.6%	2,276	19.2%	2,957	10.7%
Median Age	34.5		35.5		40.4		47.5		53.5		40.3		41.0	
Med. HH Income	\$ 54,755		\$ 46,762		\$ 119,404		\$ 99,441		\$ 57,913		\$ 80,421		\$ 58,511	
Avg. HH Size	1.87		2.48		2.42		2.13		1.96		2.71		1.60	

Sources: Nielsen-Claritas, GRC Associates, Inc., Aug. 2013

**Table 7
Demographic Data
3 Miles From Piers**

Description	Newport		Balboa		Huntinton Beach Pier		Seal Beach Pier		San Clemente Pier		Oceanside Pier	
Population	70,437		68,944		97,630		60,772		41,559		58,145	
Race/Ethnicity												
White	56,505	80.2%	61,464	89.2%	77,913	79.8%	49,914	82.1%	35,419	85.2%	40,450	69.6%
Black	662	0.9%	549	0.8%	755	0.8%	1,338	2.2%	274	0.7%	2,257	3.9%
Am. Indian	341	0.5%	203	0.3%	430	0.4%	224	0.4%	286	0.7%	641	1.1%
Asian	2,583	3.7%	2,989	4.3%	10,940	11.2%	4,959	8.2%	1,350	3.2%	2,237	3.8%
Nat. Haw.	177	0.3%	122	0.2%	292	0.3%	118	0.2%	72	0.2%	530	0.9%
Other	7,720	11.0%	1,612	2.3%	2,980	3.1%	1,757	2.9%	2,676	6.4%	8,912	15.3%
Two +	2,449	3.5%	2,006	2.9%	4,320	4.4%	2,460	4.0%	1,483	3.6%	3,118	5.4%
Total	70,437	100.0%	68,945	100.0%	97,630	100.0%	60,770	100.0%	41,560	100.0%	58,145	100.0%
Hispanic	17,812	25.3%	6,102	8.9%	1,226	1.3%	7,188	11.8%	7,912	19.0%	20,765	35.7%
Median Age	38.5		44.3		42.2		50.3		40.8		31.2	
Med. HH Income	\$ 70,628		\$ 87,391		\$ 78,567		\$ 62,607		\$ 69,499		\$ 48,416	
Avg. HH Size	2.33		2.10		2.46		1.87		2.50		2.66	

Description	Ocean Beach Pier		Imperial Beach Pier		Manhattan Beach Pier		Malibu Pier		Pismo Beach Pier		Pacifica Mun.Pier		Santa Monica Pier	
Population	64,538		47,877		116,936		6,826		29,565		105,374		153,119	
Race/Ethnicity														
White	54,139	83.9%	28,357	59.2%	90,906	77.7%	5,762	84.4%	23,577	79.7%	32,845	31.2%	118,836	77.6%
Black	2,122	3.3%	1,819	3.8%	2,467	2.1%	194	2.8%	275	0.9%	3,163	3.0%	5,553	3.6%
Am. Indian	386	0.6%	426	0.9%	398	0.3%	14	0.2%	326	1.1%	382	0.4%	615	0.4%
Asian	2,201	3.4%	4,017	8.4%	11,951	10.2%	448	6.6%	1,045	3.5%	54,717	51.9%	13,334	8.7%
Nat. Haw.	199	0.3%	272	0.6%	330	0.3%	9	0.1%	56	0.2%	1,241	1.2%	230	0.2%
Other	2,618	4.1%	10,087	21.1%	4,366	3.7%	138	2.0%	2,915	9.9%	7,154	6.8%	7,775	5.1%
Two +	2,819	4.4%	2,899	6.1%	6,519	5.6%	260	3.8%	1,371	4.6%	5,871	5.6%	6,776	4.4%
Total	64,538	100.0%	47,877	100.0%	116,936	100.0%	6,826	100.0%	29,565	100.0%	105,374	100.0%	153,119	100.0%
Hispanic	8,107	12.6%	27,881	58.2%	16,255	13.9%	524	0.8%	7,236	24.5%	18,641	17.7%	21,143	13.8%
Median Age	35.3		33.1		39.3		34.7		42.0		41.0		40.7	
Med. HH Income	\$ 58,964		\$ 44,281		\$ 97,740		\$ 108,378		\$ 51,642		\$ 84,476		\$ 69,991	
Avg. HH Size	2.10		3.04		2.40		2.24		2.36		3.01		1.95	

Sources: Nielsen-Claritas, GRC Associates, Inc., Aug. 2013

Table 8

Taxable Sales by Major Retail Category

1/4-Mile From Pier

Pier	Apparel			Eating and Drinking			Food Stores			Furniture and Appliance		
	Num. of Stores	Taxable Sales	Avg. Sales Per Store	Num. of Stores	Taxable Sales	Avg. Sales Per Store	Num. of Stores	Taxable Sales	Avg. Sales Per Store	Num. of Stores	Taxable Sales	Avg. Sales Per Store
Newport	9	1,738,400	193,156	20	24,935,000	1,246,750						
Balboa	14	1,848,100	132,007	30	12,249,500	408,317	4	1,233,500	308,375			
Huntington Beach	39	13,590,200	348,467	43	49,526,200	1,151,772	9	412,100	45,789			
Seal Beach	11	2,238,600	203,509	19	12,082,000	635,895						
San Clemente	15	3,078,000	205,200	16	15,023,200	938,950	4	687,800	171,950	16	1,070,300	66,894
Oceanside				27	16,921,300	626,715						
San Diego Ocean Pier	25	8,622,100	344,884	52	31,218,700	600,360	5	3,267,100	653,420	42	2,762,500	65,774
Imperial Beach				11	2,858,000	259,818						
Manhattan Beach	46	25,290,500	549,793	51	66,510,400	1,304,125				10	1,286,300	128,630
Malibu				7	4,277,200	611,029						
Pismo Beach	7	5,207,200	743,886	16	17,101,800	1,068,863						
Pacifica				6	818,700	136,450						
Santa Monica				7	24,361,200	3,480,171						
Total - Average	166	61,613,100	371,163	305	277,883,200	911,092	22	5,600,500	254,568	68	5,119,100	75,281

Source: GRC Associates, Inc., Sept. 2013

Table 8
Taxable Sales
1/4-Mile Fron

Pier	General Merchandise			Other Retail			Total Retail			Mfgs and Whole.		
	Num. of Stores	Taxable Sales	Avg. Sales Per Store	Num. of Stores	Taxable Sales	Avg. Sales Per Store	Num. of Stores	Taxable Sales	Avg. Sales Per Store	Num. of Stores	Taxable Sales	Avg. Sales Per Store
Newport				20	3,321,000	166,050	49	29,994,400	612,131	17	967,900	56,935
Balboa				36	8,167,900	226,886	84	23,499,000	279,750	11	142,900	12,991
Huntington Beach				62	22,649,000	365,306	153	86,177,500	563,252	32	1,236,000	38,625
Seal Beach				36	2,281,000	63,361	66	16,601,600	251,539	24	388,500	16,188
San Clemente				54	3,520,000	65,185	105	23,379,300	222,660	24	927,900	38,663
Oceanside	5	2,556,400	511,280	58	12,794,900	220,602	90	32,272,600	358,584	26	2,679,800	103,069
San Diego Ocean Pier				98	15,109,500	154,179	222	60,979,900	274,684	47	1,853,700	39,440
Imperial Beach				26	875,800	33,685	37	3,733,800	100,914	7	46,100	6,586
Manhattan Beach				50	14,564,600	291,292	157	107,651,800	685,680	48	3,105,800	64,704
Malibu				8	1,606,500	200,813	15	5,883,700	392,247	7	2,610,000	372,857
Pismo Beach				39	4,195,400	107,574	62	26,504,400	427,490	15	3,085,500	205,700
Pacifica				40	678,200	16,955	46	1,496,900	32,541	17	926,100	54,476
Santa Monica				16	2,313,000	144,563	23	26,674,200	1,159,748	2	103,500	51,750
Total - Average	5	2,556,400	511,280	543	92,076,800	169,571	1109	444,849,100	401,126	277	18,073,700	65,248

Source: GRC Ass

Table 8
Taxable Sales
1/4-Mile Fron

Pier	Grand Total - All Outlets		
	Num. of Stores	Taxable Sales	Avg. Sales Per Store
Newport	66	30,962,300	469,126
Balboa	95	23,641,900	248,862
Huntington Beach	185	87,413,500	472,505
Seal Beach	90	16,990,100	188,779
San Clemente	129	24,307,200	188,428
Oceanside	116	34,952,400	301,314
San Diego Ocean Pier	269	62,833,600	233,582
Imperial Beach	44	3,779,900	85,907
Manhattan Beach	205	110,757,600	540,281
Malibu	22	8,493,700	386,077
Pismo Beach	77	29,589,900	384,284
Pacifica	63	2,423,000	38,460
Santa Monica	25	26,777,700	1,071,108
Total - Average	1386	462,922,800	333,999

Source: GRC Ass

**Table 9
Retail Space Available For Lease
Newport Beach, CA**

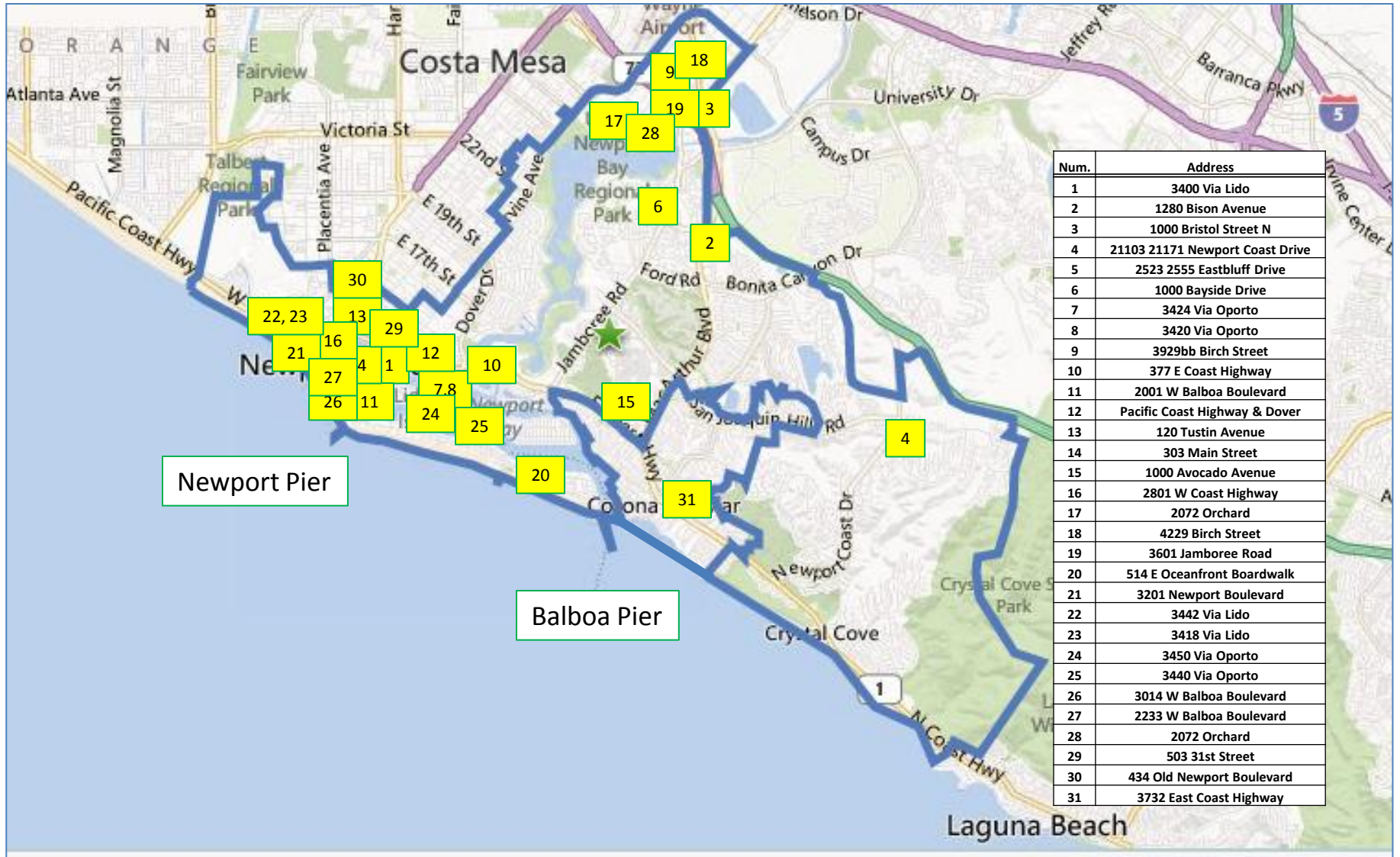
Num.	Address	Asking Rate (Mo.)		Size Sq. Ft.	Comments
1	3400 Via Lido, Newport Beach, CA 92663	\$ 2.00		2,593	Single story building in Lido Village. Wood paneled interior and dual purpose office or retail space. High exposure across the street from the water and docks.
2	1280 Bison Avenue, Newport Beach, CA 92660	n/a		900	
3	1000 Bristol Street N, Newport Beach, CA 92660	\$ 0.75		1,100 - 1,200	
4	21103 21171 Newport Coast Drive, Newport Beach, CA 92657	n/a		2,788	3 strips anchored by a other owned Pavilions.
5	2523 2555 Eastbluff Drive, Newport Beach, CA 92660	n/a		1,800	
6	1000 Bayside Drive, Newport Beach, CA 92660	n/a		1,500	Bayside Center serves neighborhoods of Lido Isle, Balboa Island, and Promontory Point (516 units). This bay-facing center near the Newport Yacht Club caters to nearby residents, including bay front real estate and Corona del Mar Village. Tenants at Bayside Center include Pavilions, Rite-Aid, Bayside Restaurant, Union Bank, Sapori Ristorante, UPS Store, and Java Bakery & Cafe. The center also features monument signage and parking.
7	3424 Via Oporto, Newport Beach, CA 92663	\$ 1.81	\$ 1.95	572-880	3432 Via Oporto is a 13,074-square-foot office building located on Newport Bay.
8	3420 Via Oporto, Newport Beach, CA 92663	\$ 2.75		3,124	
9	3929bb Birch Street, Newport Beach, CA 92660	\$ 1.95		822	Wood Frame and Concrete Block retail center. Walk-up surface parking; 3.5:1000 Parking Ratio.
10	377 E Coast Highway, Newport Beach, CA 92660	\$ 3.75		3,000	Former tenant was West Marine. Available October 1st. Storefront glass to be installed where West Marine had blocked out storefront. \$4.25/SF plus \$0.55 CAM. 5:1 parking ratio.
11	2001 W Balboa Boulevard, Newport Beach, CA 92663	\$ 4.50		1,400	1400 square foot free standing building on Balboa Peninsula. On site parking. Retail/Office Building Prominent signage and high traffic counts - doubled in summer.
12	Pacific Coast Highway & Dover, Newport Beach, CA 92660	n/a		125-5,439	Mariner's Pointe is a retail and restaurant development, positioned next to Newport Harbor. This property features on site parking via a 3-story garage and immediate proximity to many amenities.
13	120 Tustin Avenue, Newport Beach, CA 92663	\$ 3.50		500-1,000	McLaren Plaza is located along Mariners Mile across from the Newport Beach Harbor where traffic counts are approximately 53,000 cars per day. This center was recently renovated and consists of approximately 10,000 square feet.
14	303 Main Street, Newport Beach, CA 92661	\$ 2.80		900-2,100	May rent entire space as is, but would like to subdivide the space in two. 1.5 blocks to ocean.
15	1000 Avocado Avenue, Newport Beach, CA 92660	n/a		600	The 600 square foot self enclosed retail or services space is located on the second floor of the expanded Newport Beach Central Library. The space is part of the Newport Beach Civic Center and Park project which includes the 17,000 square foot library expansion, a 450 space parking structure, a 98,000 square foot city hall building, and a 15 acre park and dog park. The project was completed in April 2013, and the space is available immediately. The retail or service facility will be accessible to library patrons and staff, City Hall visitors and staff, park visitors, and visitors from the surrounding offices, commercial space, and residents. A new food service facility will be located in the same area and will serve the same population.
16	2801 W Coast Highway, Newport Beach, CA 92663			5,600	Former Chart House restaurant, waterfront dining.
17	2072 Orchard Dr., Newport Beach, CA 92660	\$ 2.90	\$ 3.66	515-820	
18	4229 Birch Street, Newport Beach, CA 92660	\$ 2.25		1,971-4,624	Airport Area, recently remodeled, dense daytime population
19	3601 Jamboree Road, Newport Beach, CA 92660	\$ 3.00		2,637	Inline units available for lease in the Back Bay Court (Other tenants: Staples, Starbucks, Pizza Hut, Supercuts, Conroy's Flowers, Sterling Optical and Planet Beauty)
20	514 E Oceanfront Boardwalk, Newport Beach, CA 92661	\$ 2.95	\$ 4.50	1,000 - 5,000	Special offers available. Oceanfront retail location for lease on the Balboa Peninsula. Across from the Ferry and across from the Balboa Resort on Oceanfront. Location on Boardwalk.
21	3201 Newport Boulevard, Newport Beach, CA 92663	\$ 3.46		4,275	Free standing building, located on NWC Newport Blvd. & 32nd Street- Serves both the high-end and seasonal residential communities- Located in close proximity to Pacific Coast Highway
22	3442 Via Lido, Newport Beach, CA 92663	\$ 3.00		6,000	
23	3418 Via Lido, Newport Beach, CA 92663	\$ 2.05		843	APN: 423-122-05, 423-122-06
24	3450 Via Oporto, Newport Beach, CA 92663	\$ 2.50		3,566 - 9,441	
25	3440 Via Oporto, Newport Beach, CA 92663	\$ 1.95		484	
26	3014 W Balboa Boulevard, Newport Beach, CA 92663	\$ 5.50		880	Turn-key Restaurant space available for lease. Visibility from all points including the public beach access area. Indoor and outdoor seating areas.
27	2233 W Balboa Boulevard, Newport Beach, CA 92663	\$ 1.85	\$ 3.00	630 - 1,220	Located in the heart of the Newport Beach Peninsula. Only one block from the Newport Beach Pier, the boardwalk, and many renown restaurants and retailers. Highly visible retail/restaurant space fronting Balboa Blvd. Street front and rear parking available.

Table 9
Retail Space Available For Lease
Newport Beach, CA

Num.	Address	Asking Rate (Mo.)		Size Sq. Ft.	Comments
28	2072 Orchard, Newport Beach, CA 92660	\$ 2.78	\$ 3.08	110-720	This is a single floor handicap access building which just renovated and approved as a coffee shop. There is a backyard with water fountain. People can sit outside and enjoy their meal with public WIFI access. 4 / 1000 plus street parking. Plus 4 individual offices with 130 sq.ft each unit
29	503 31st Street, Newport Beach, CA 92663	\$ 2.15		3,338	First time on the market in 20 years. Unique, standalone building with 30' ceilings, large sliding doors, dedicated restroom and industrial sink. The space is an open plan, ab light and concrete floors. Great for architects, engineers, or showroom space. There is parking behind the building and additional parking available next door. The net charges are approximately \$0.44/SF and excludes utilities and janitorial.
30	434 Old Newport Boulevard, Newport Beach, CA 92663	\$ 3.05		1,295	Mixed Use. Work live property. This is a freestanding commercial building with a residence in the back. Close to Hoag Hospital other retail amenities and the beach. Private offices, open area, kitchen and residence in the rear.
31	3732 East Coast Highway, Corona del Mar, CA 92625	\$ 6.11		1,800	Under construction/rehabilitation retail space

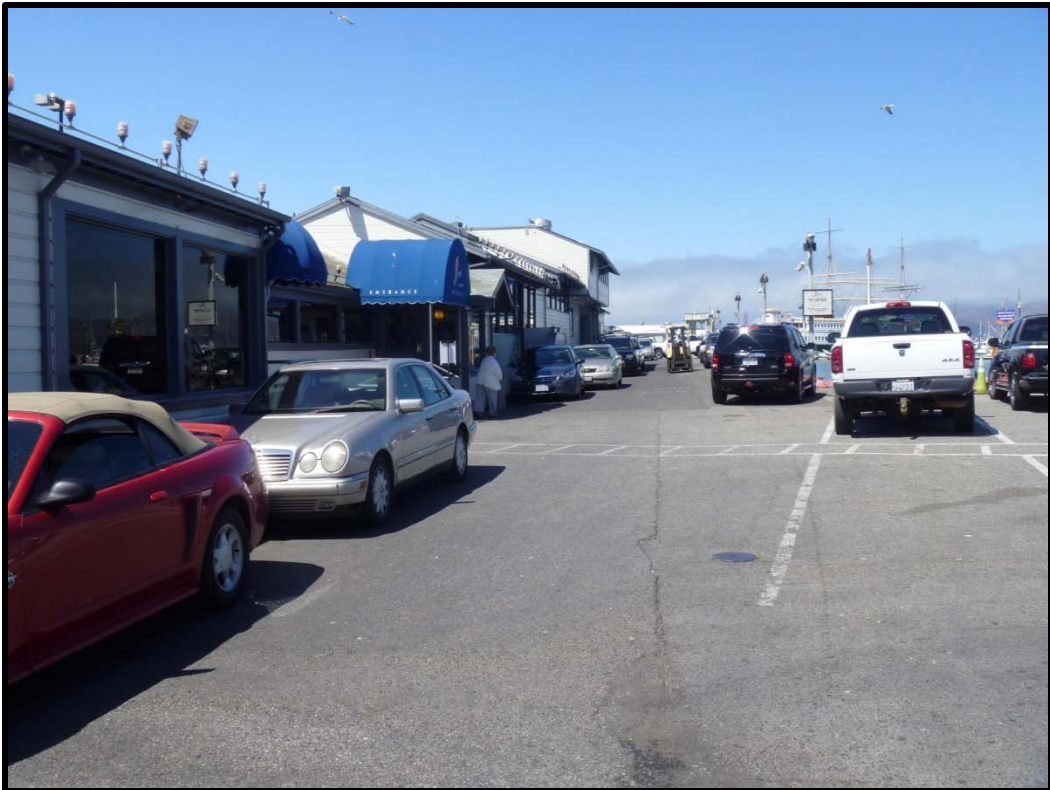
Sources: Loopnet, City Feet, GRC Assoc., Aug. 2013

Figure 1
Retail Space for Lease
City of Newport Beach, CA

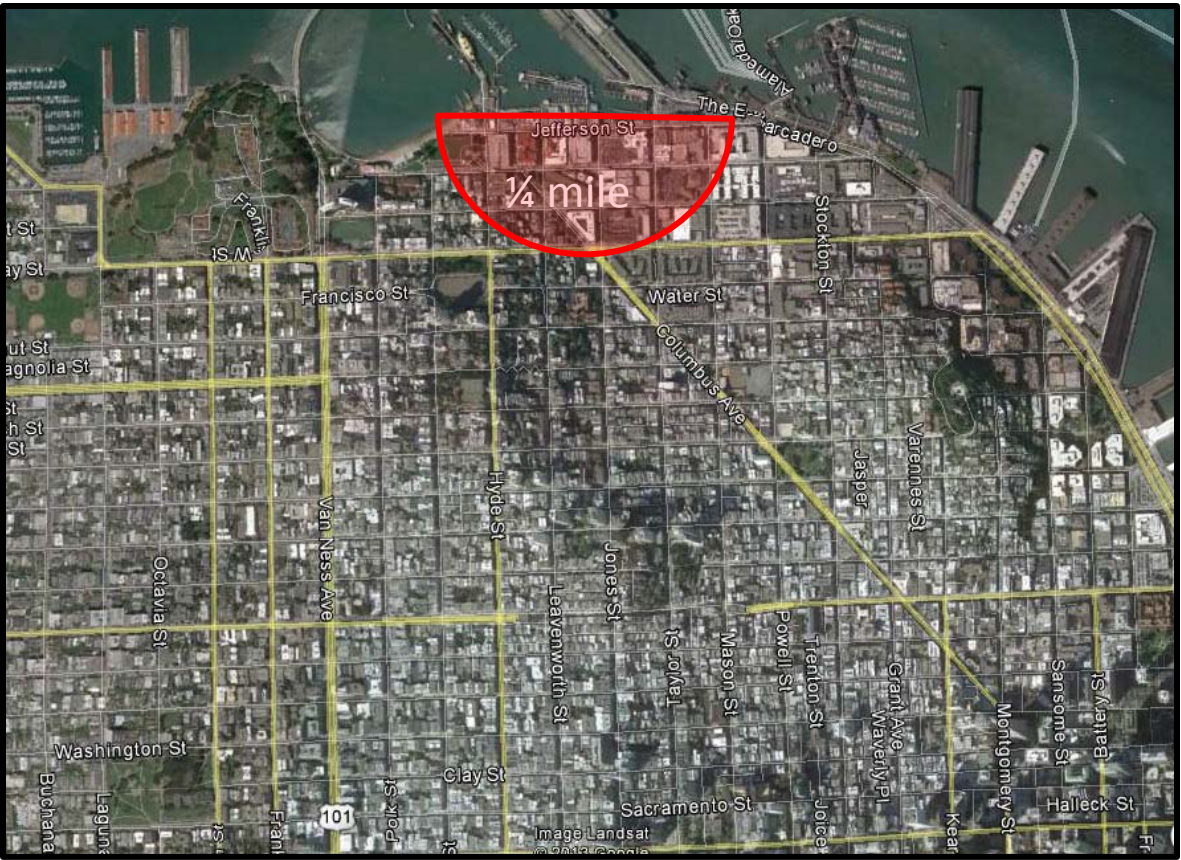


Appendix B

Pier 1
San Francisco Pier 47



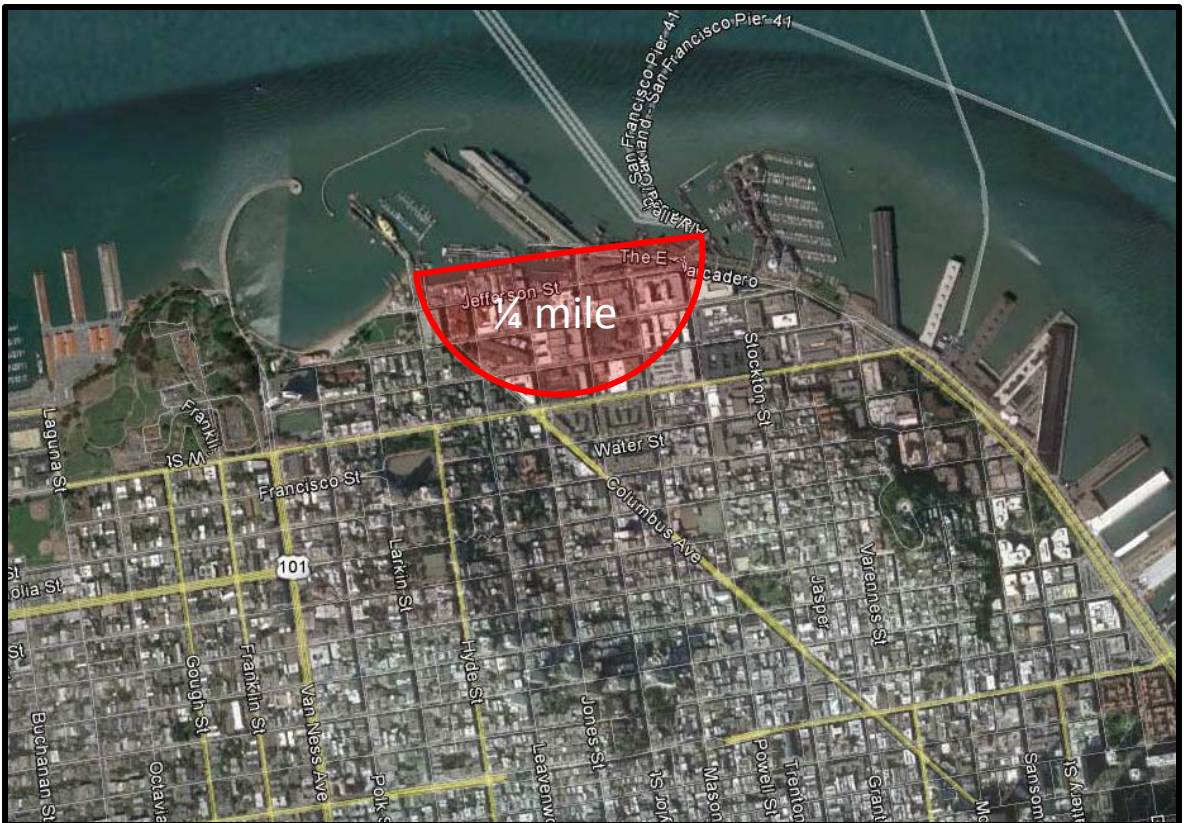
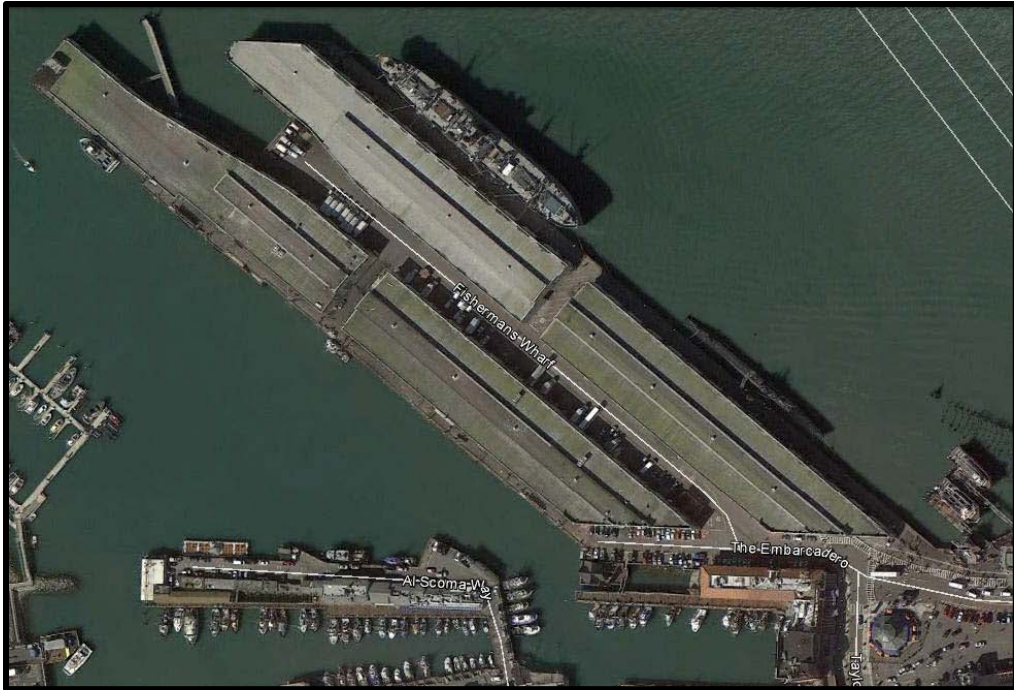
Pier 1 San Francisco Pier 47



Pier 2
San Francisco
Fisherman's Wharf



Pier 2 San Francisco Fisherman's Wharf



Pier 39 San Francisco Pier 39



EAT AT THE PIER

HOURS
Most full-service restaurants open 11 a.m. - 10 p.m. Some of the best restaurants are open earlier for breakfast.

RUBRA GUMP SHRIMP CO RESTAURANT & MARKET
Join us for lunch and dinner on Level 2
Call us at 415.433.4823
Durable Cookery Strategy • The Whole Fish Book • Heritage Sausage House • Specialty Sausage • Specialty Sausage House

CRAB HOUSE
Join us for lunch and dinner on Level 2
Call us at 415.433.2723
Specialty Sausage • Specialty Sausage • Specialty Sausage • Specialty Sausage • Specialty Sausage • Specialty Sausage • Specialty Sausage • Specialty Sausage • Specialty Sausage • Specialty Sausage

EAGLE CAFE
Join us for breakfast, lunch, and dinner on Level 2
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FOG HARBOR FISH HOUSE
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Specialty Sausage • Specialty Sausage • Specialty Sausage • Specialty Sausage • Specialty Sausage • Specialty Sausage • Specialty Sausage • Specialty Sausage • Specialty Sausage • Specialty Sausage

FORBES ISLAND
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NANA TEN JAPANESE GRILL & SUZU BAR
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HARD ROCK CAFE
Join us for lunch and dinner on Level 1
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PARKING
Parking lots are open to all. For more information, please see validated parking in the Pier 39 Curbside Garage. Hours: 10 a.m. - 6 p.m.

LUIGI'S PIZZERIA
Join us for lunch and dinner on Level 2
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Specialty Sausage • Specialty Sausage • Specialty Sausage • Specialty Sausage • Specialty Sausage • Specialty Sausage • Specialty Sausage • Specialty Sausage • Specialty Sausage • Specialty Sausage

MANGO'S TAQUERIA & CANTINA
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NEPTUNE'S WATERFRONT GRILL & BAR
Join us for lunch and dinner on Level 2
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PIER MARKET
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PLAYERS SPORTS GRILL & ARCADE
Join us for lunch and dinner on Level 1
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SWISS LOUIS ITALIAN & SEAFOOD RESTAURANT
Join us for lunch and dinner on Level 2
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Specialty Sausage • Specialty Sausage • Specialty Sausage • Specialty Sausage • Specialty Sausage • Specialty Sausage • Specialty Sausage • Specialty Sausage • Specialty Sausage • Specialty Sausage

WIPEDOUT BAR & GRILL
Join us for lunch and dinner on Level 1
Call us at 415.433.2723
Specialty Sausage • Specialty Sausage • Specialty Sausage • Specialty Sausage • Specialty Sausage • Specialty Sausage • Specialty Sausage • Specialty Sausage • Specialty Sausage • Specialty Sausage

PIER 39

Pier 3 San Francisco Pier 39

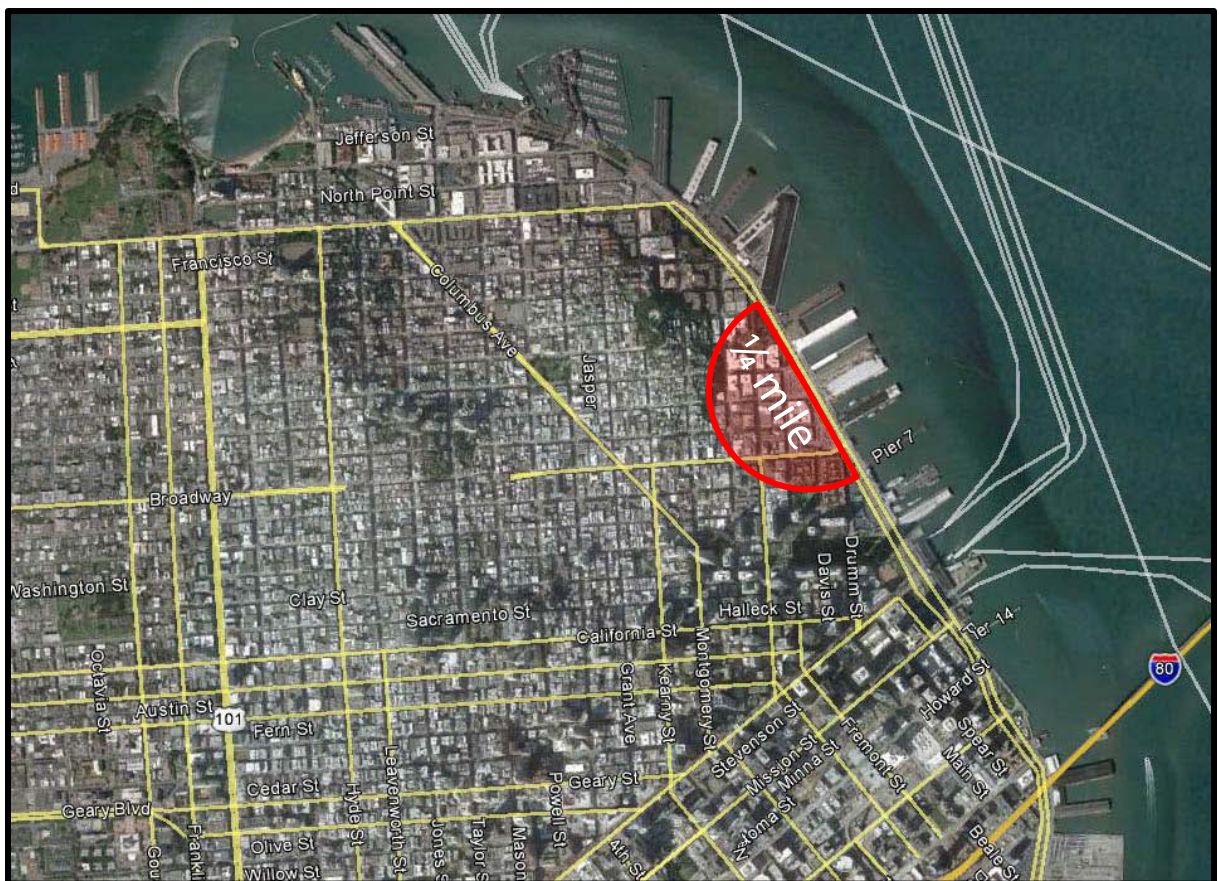


Pier 4
San Francisco Pier 15/17



Pier 4

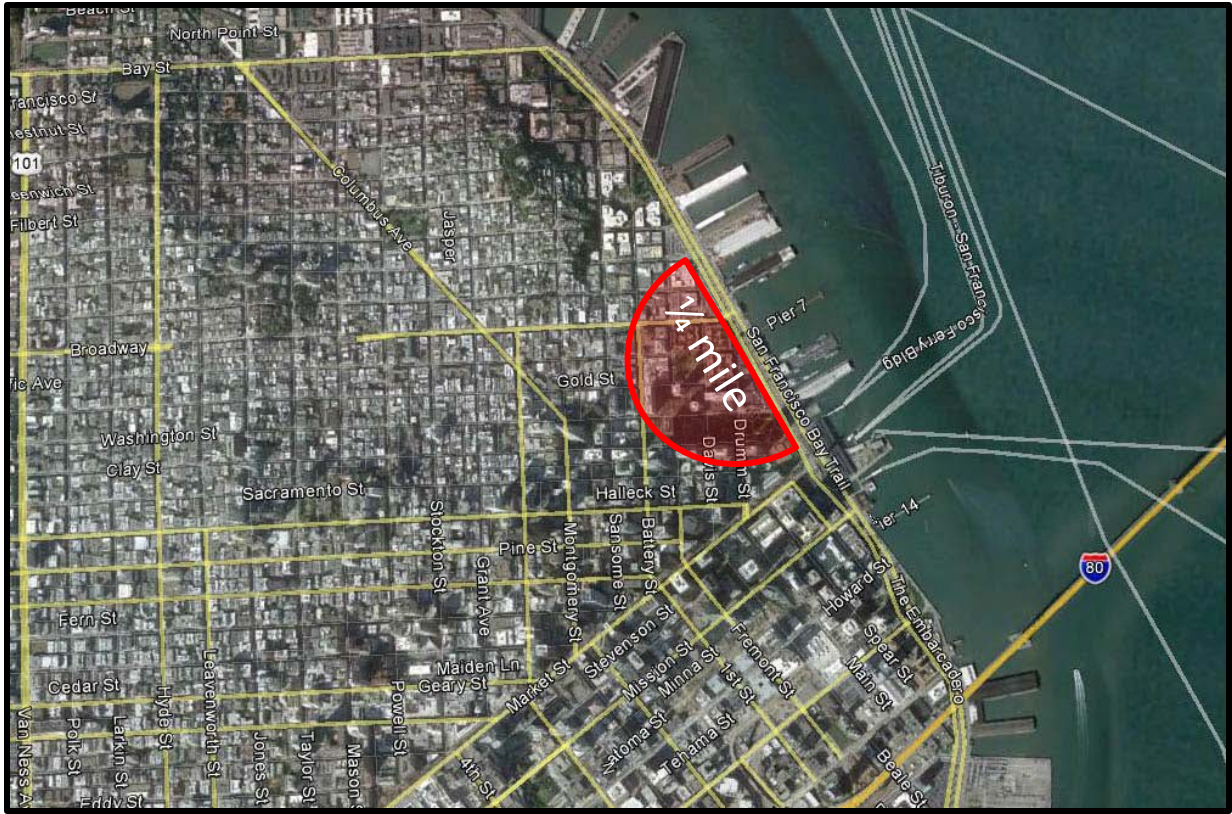
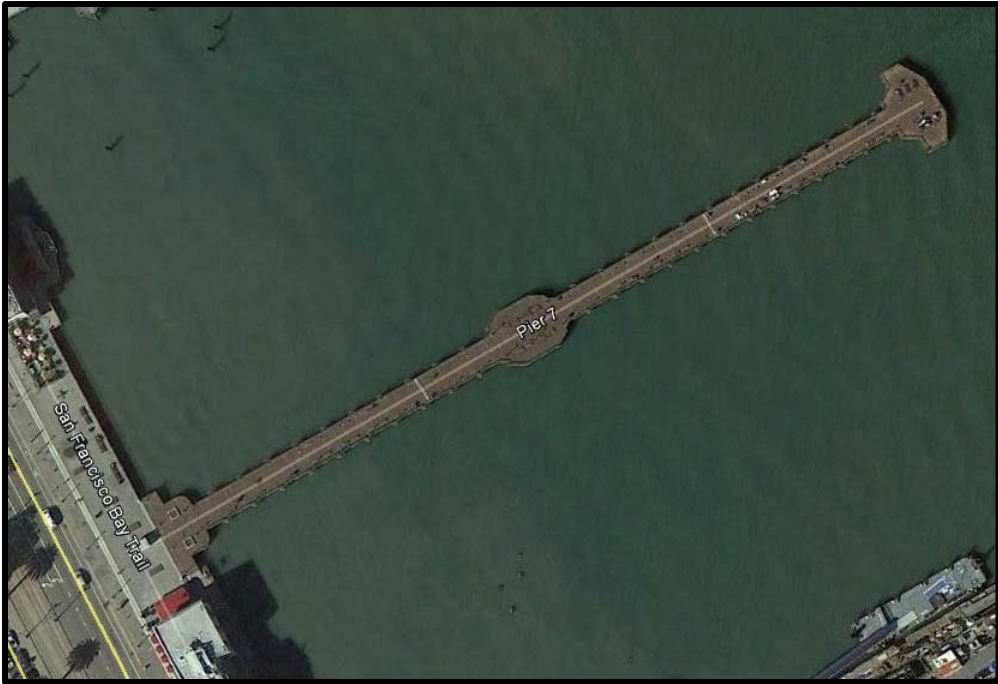
San Francisco Pier 15/17



Pier 5
San Francisco Pier 7



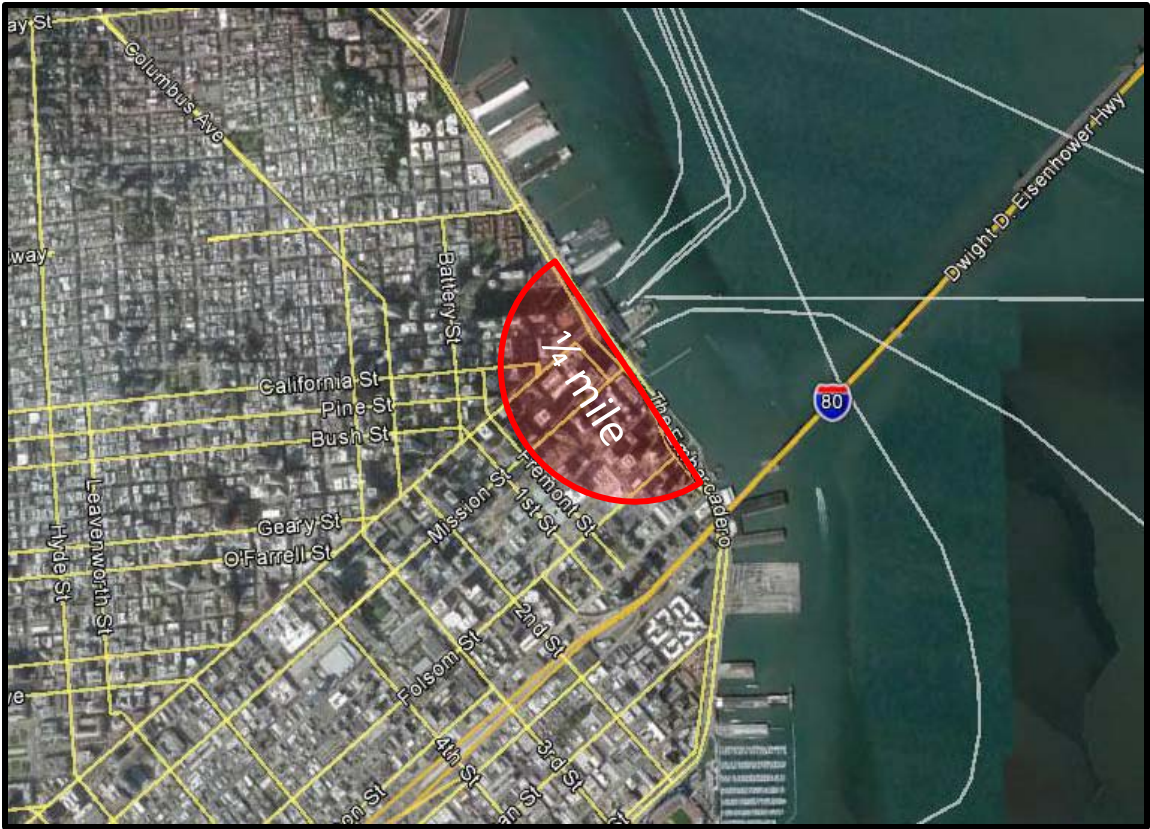
Pier 5 San Francisco Pier 7



Pier 6
San Francisco Pier 2



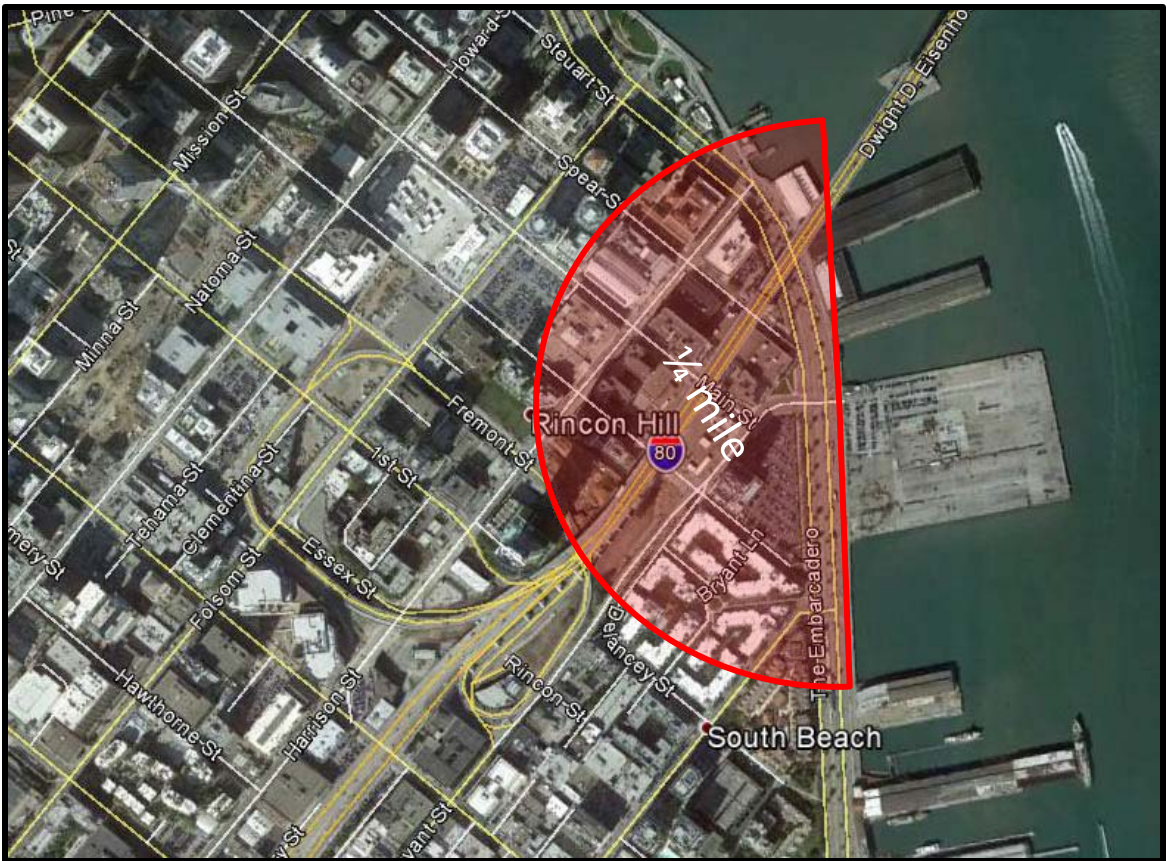
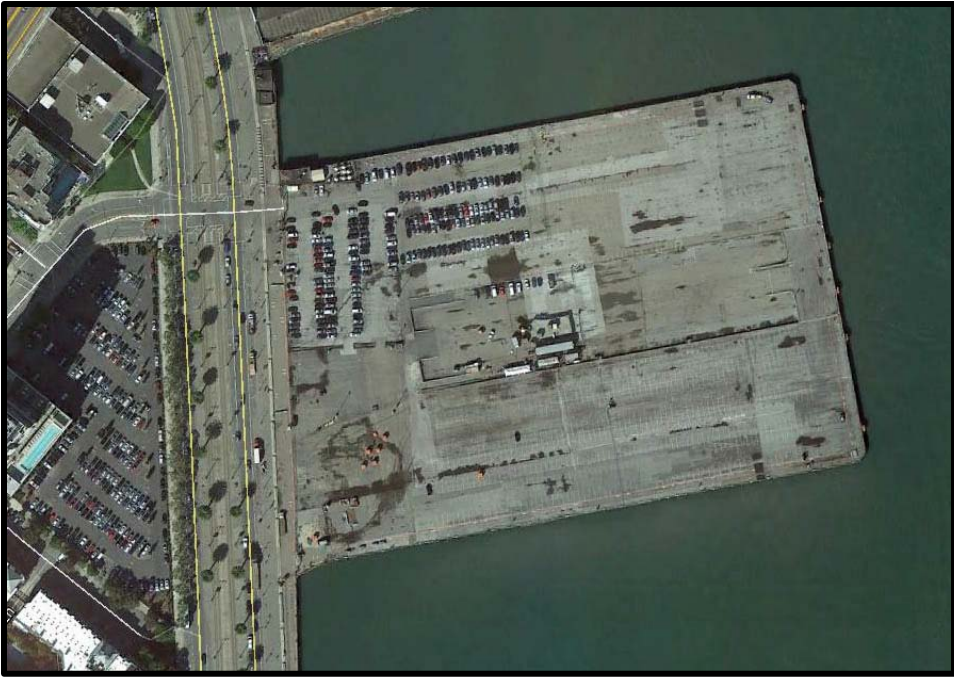
Pier 6 San Francisco Pier 2



Pier 7
San Francisco Pier 30



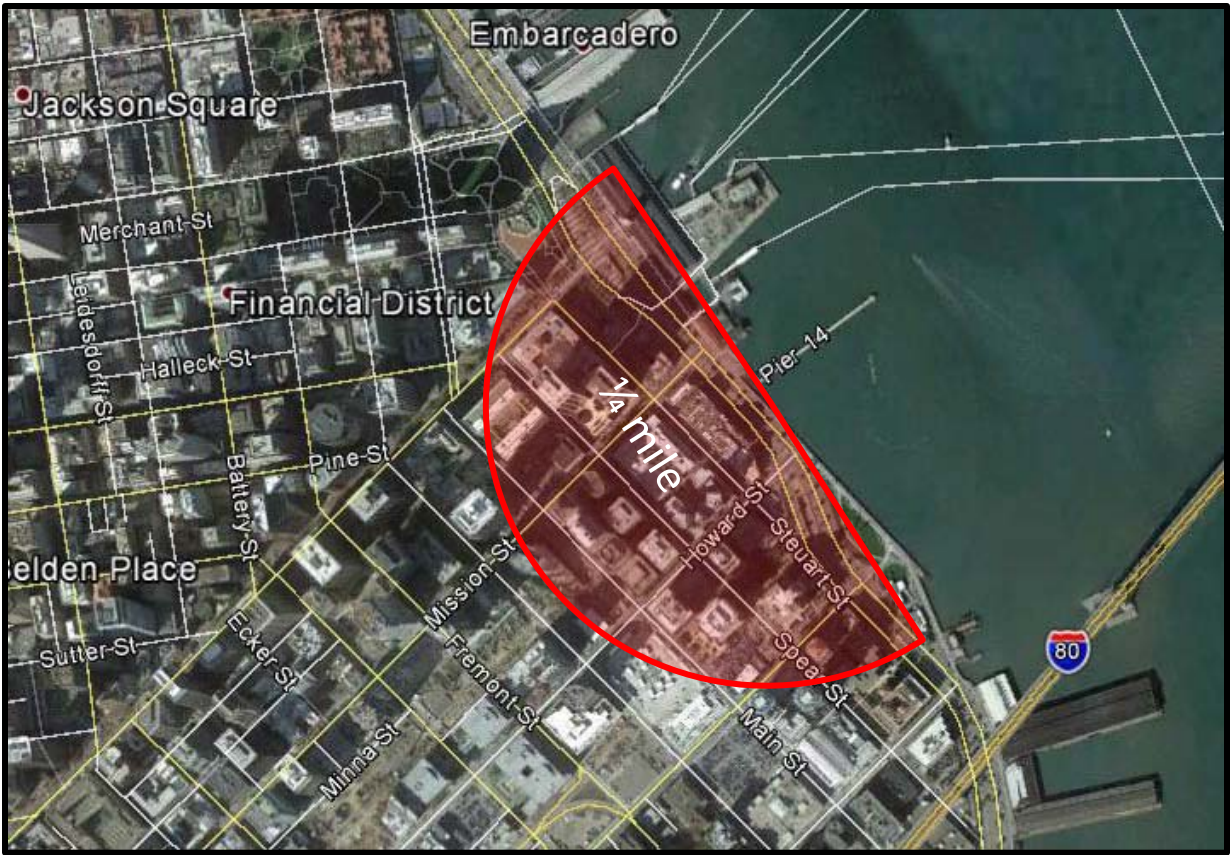
Pier 7 San Francisco Pier 30



Pier 8
San Francisco Pier 14



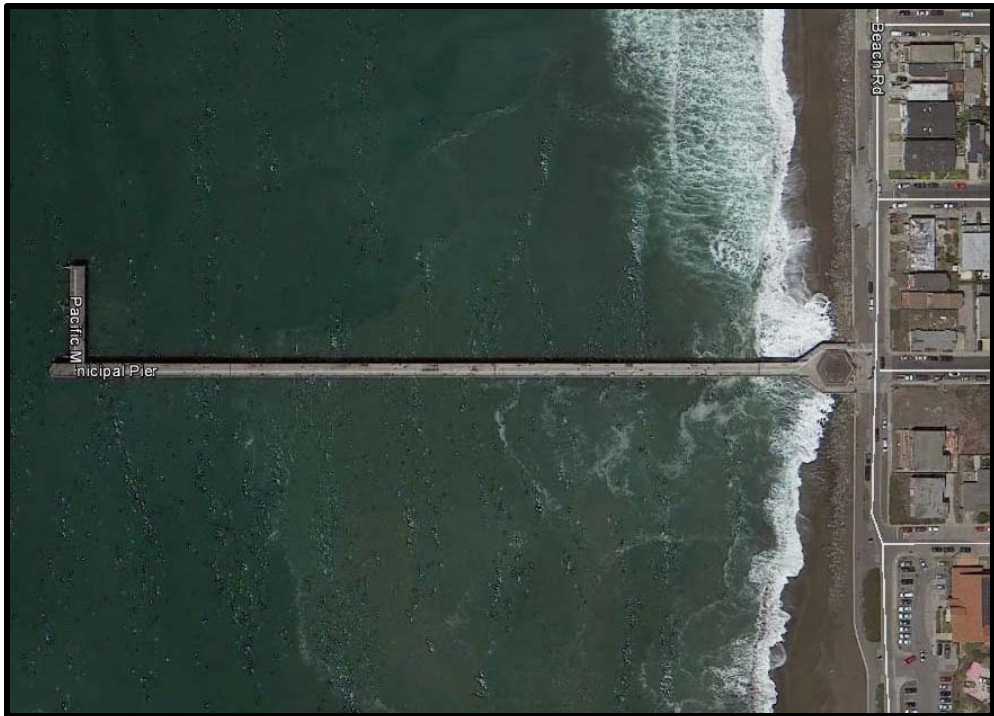
Pier 8
San Francisco Pier 14



Pier 9
Pacifica Municipal Pier



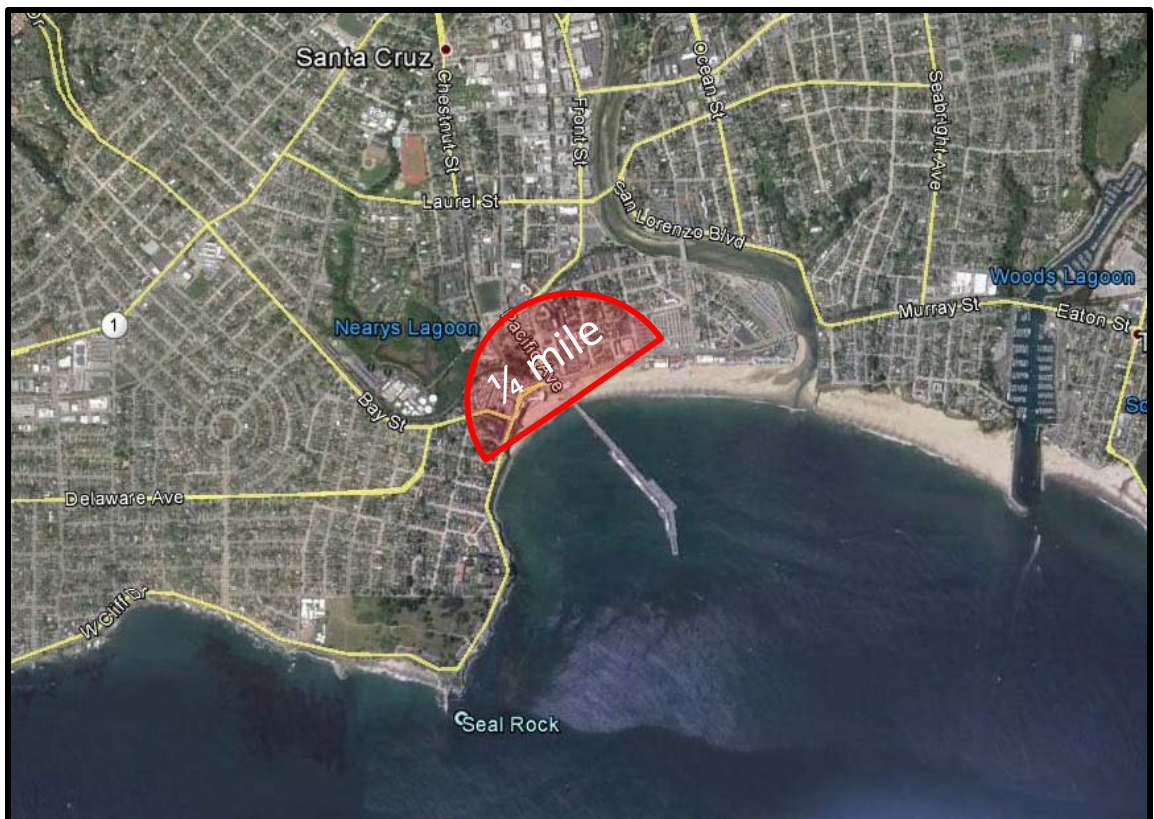
Pier 9 Pacifica Municipal Pier



Pier 10 Santa Cruz Wharf



Pier 10 Santa Cruz Wharf



Pier 11
Sea Cliff State Park



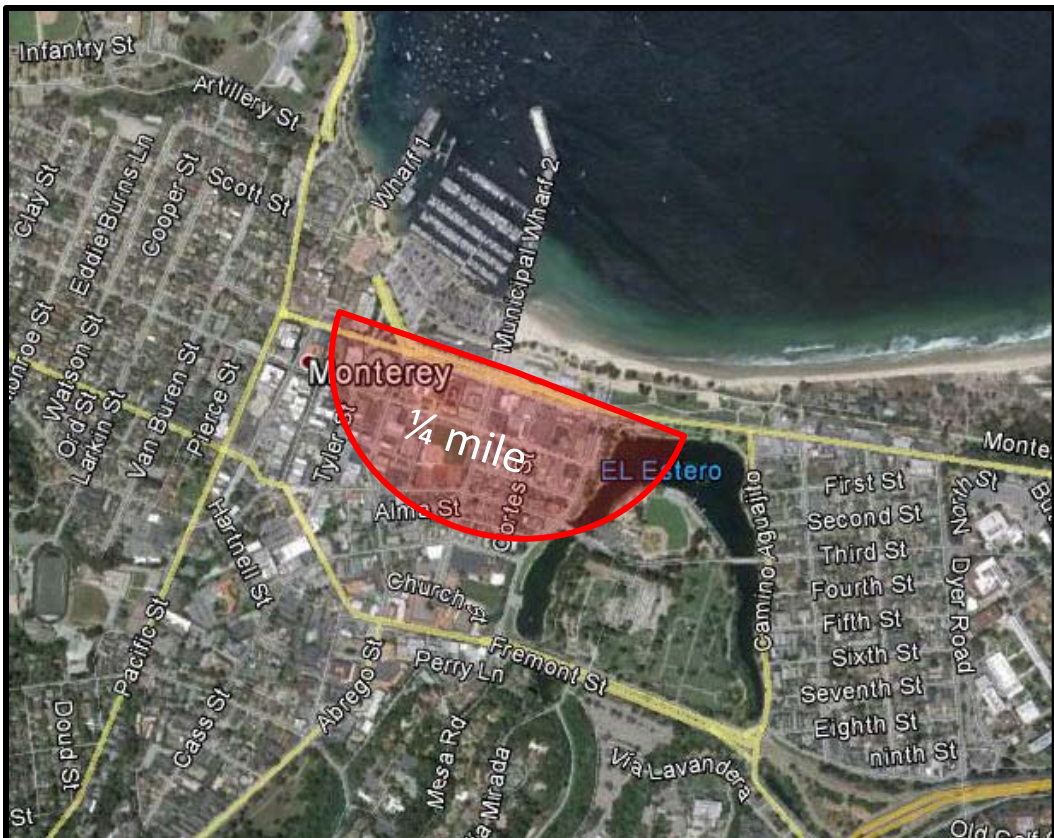
Pier 11 Sea Cliff State Park



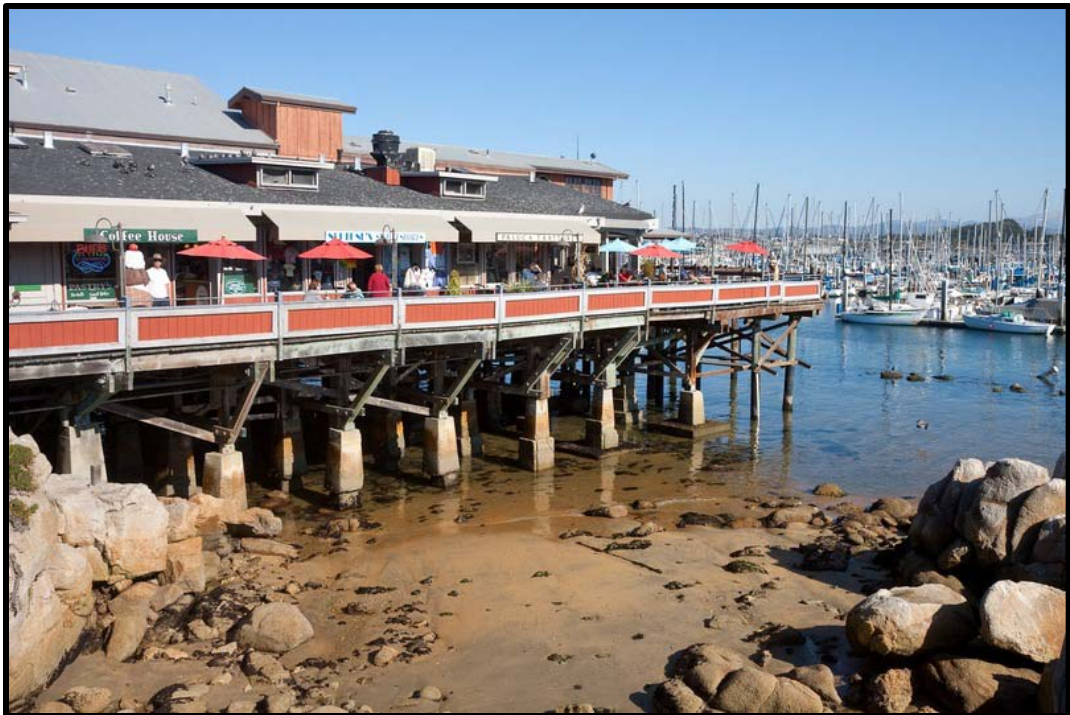
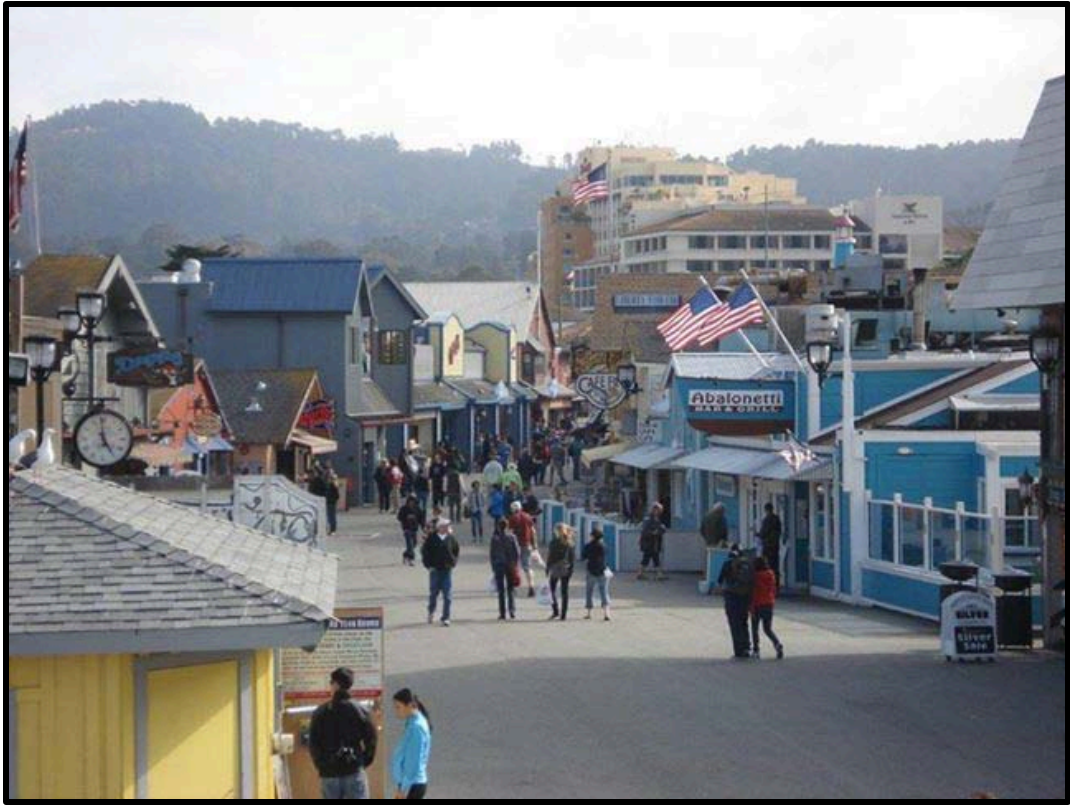
Pier 12
Monterey Municipal Wharf 2



Pier 12 Monterey Municipal Wharf 2



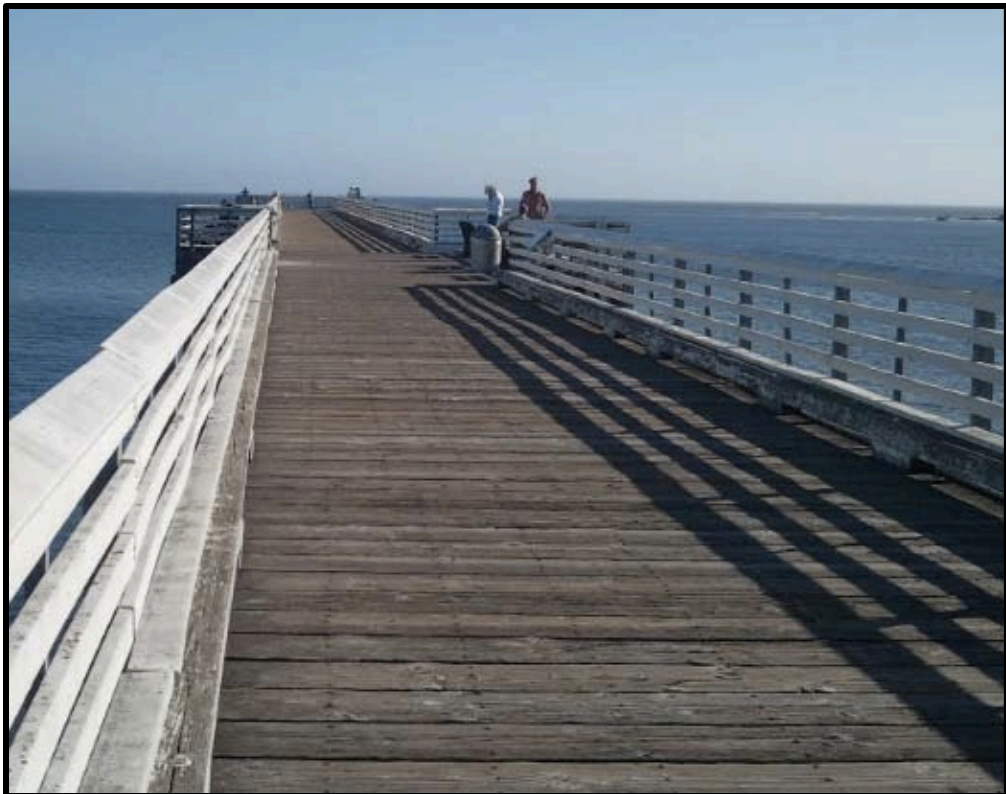
Pier 13 Monterey Old Fisherman's Wharf



Pier 13 Monterey Old Fisherman's Wharf



Pier 14 San Simeon Pier



Pier 14 San Simeon Pier



Pier 15
Los Cayucos Pier



Pier 15 Los Cayucos Pier



Pier 16 Harford Pier



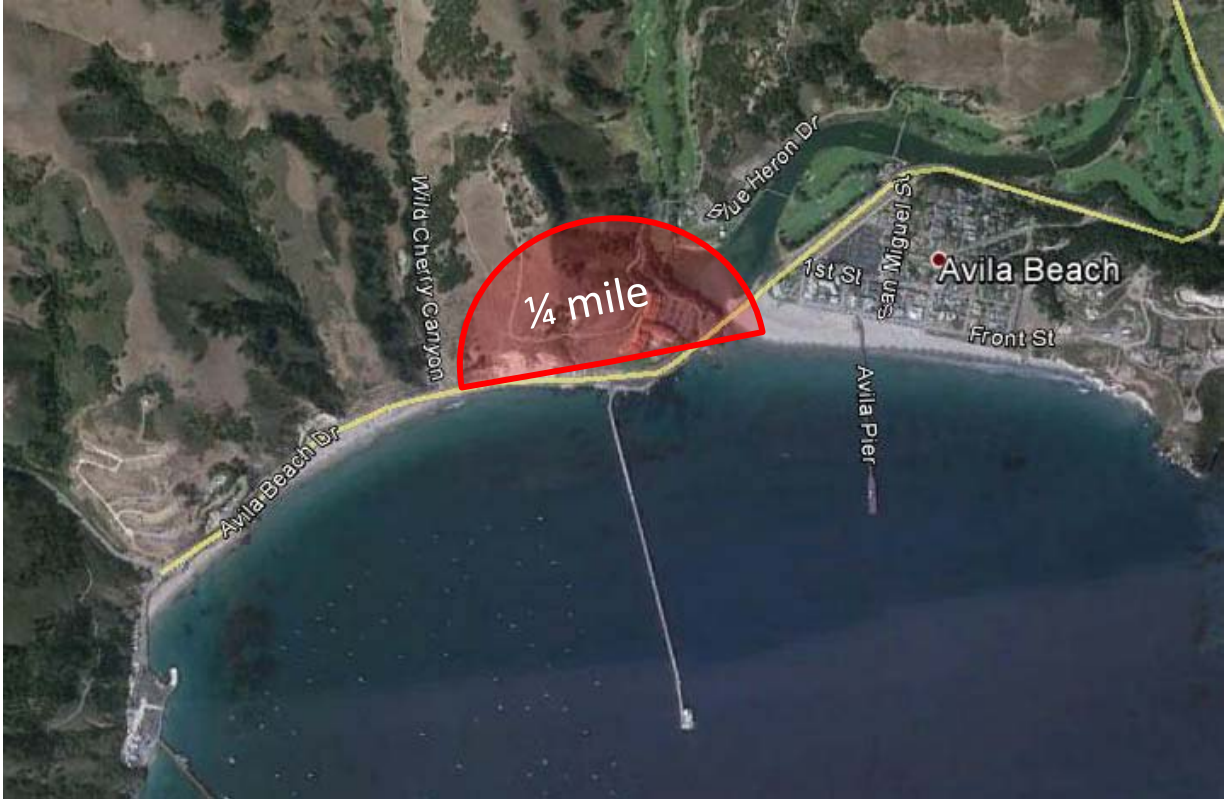
Pier 16 Harford Pier



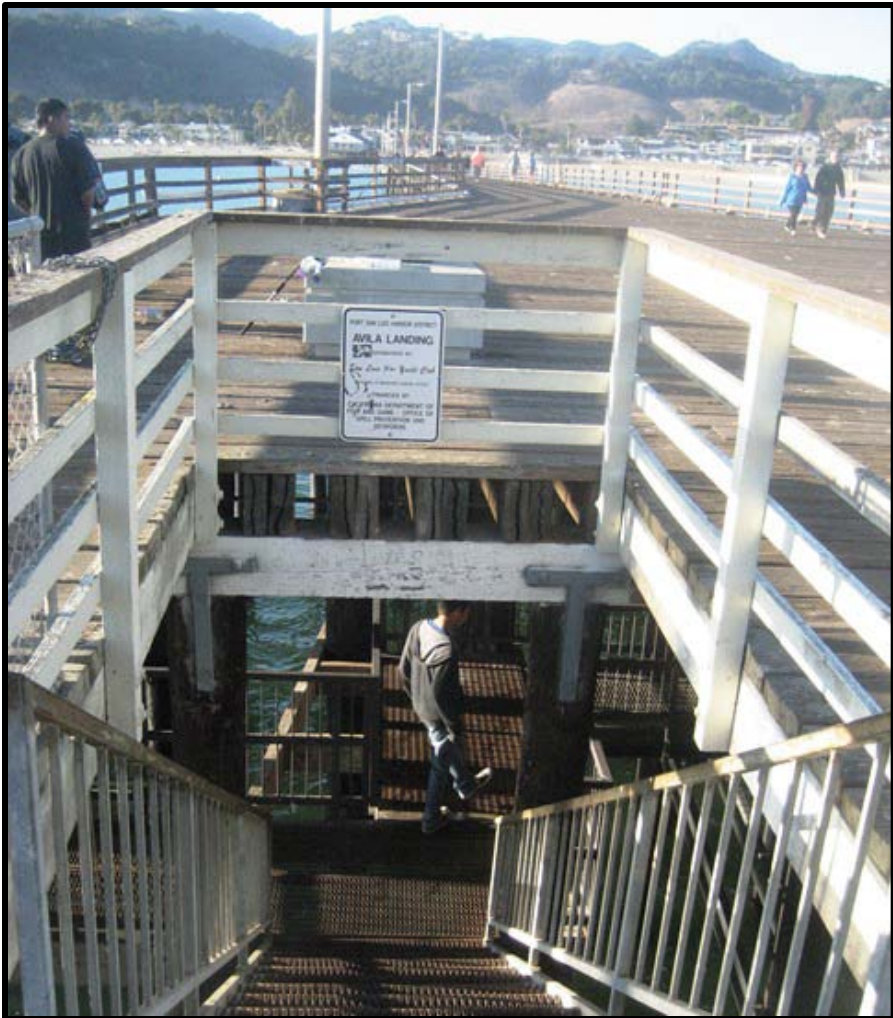
Pier 17
Cal Poly Pier



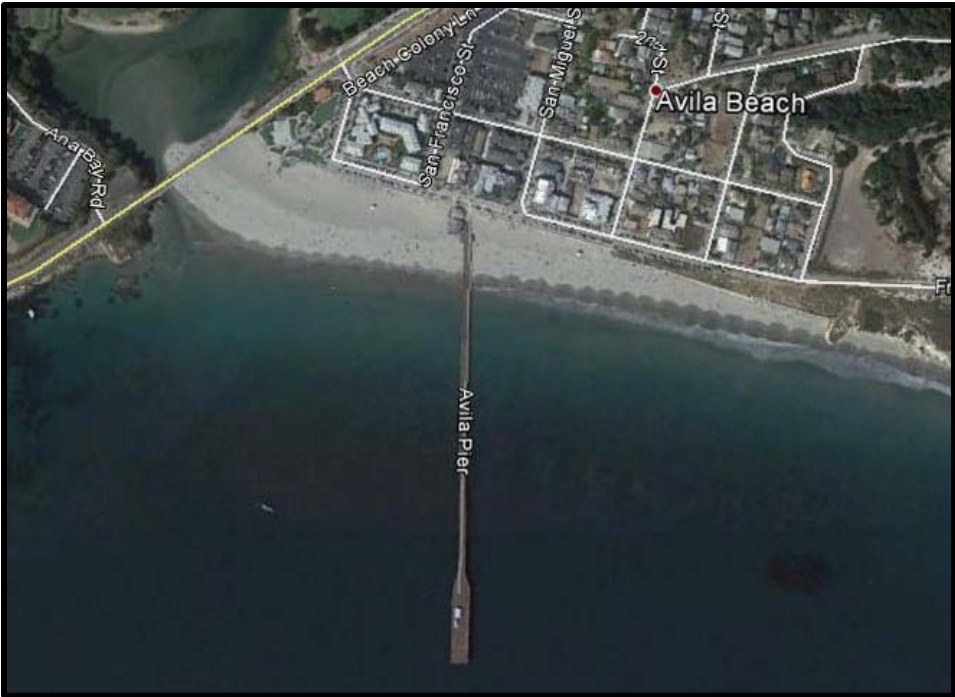
Pier 17 Cal Poly Pier



Pier 18 AvilaPier



Pier 18 Avila Pier

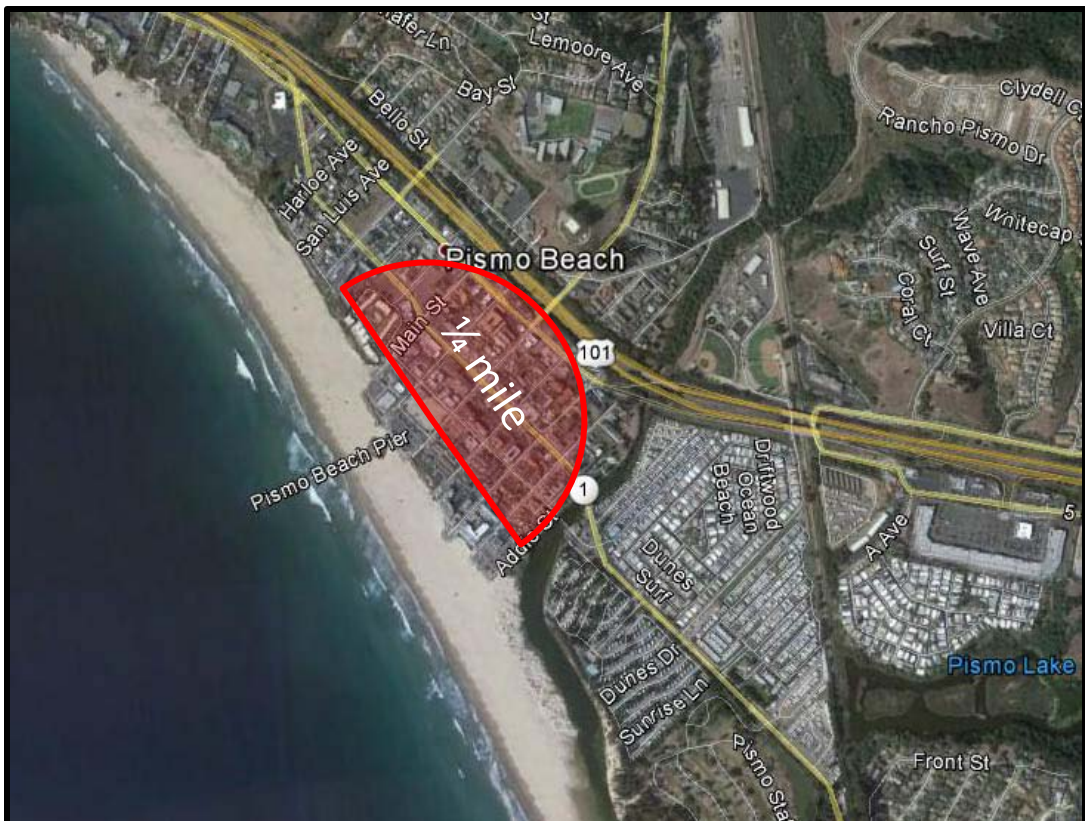


Pier 19 Pismo Beach Pier

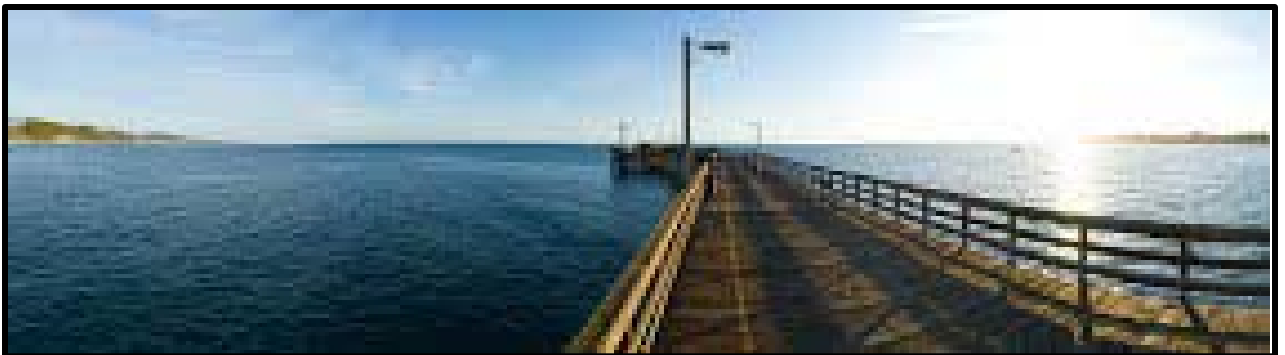


Pier 19

Pismo Beach Pier



Pier 20
Goleta Pier



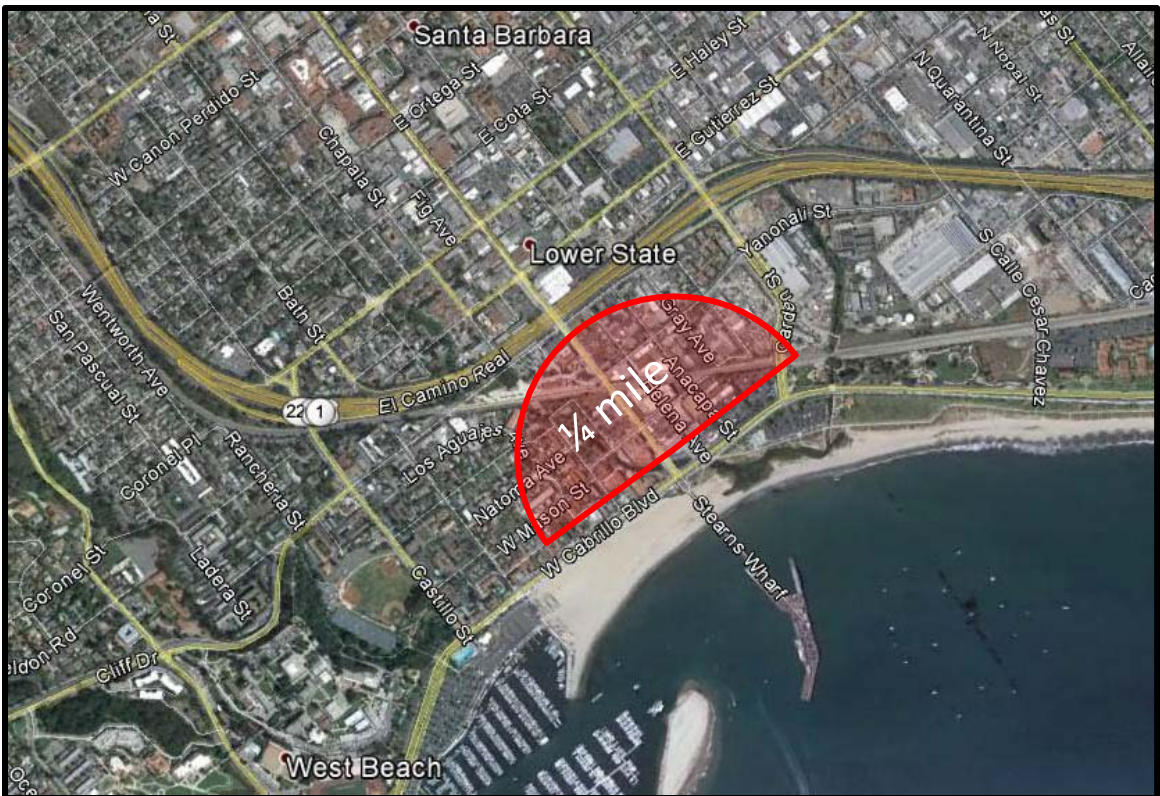
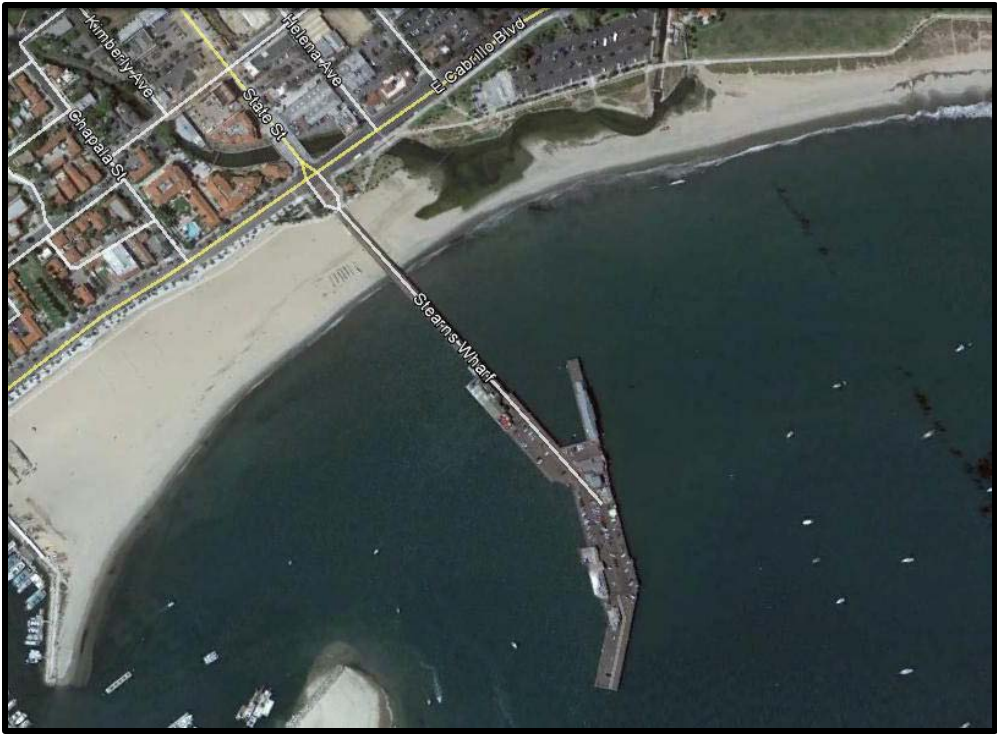
Pier 20 Goleta Pier



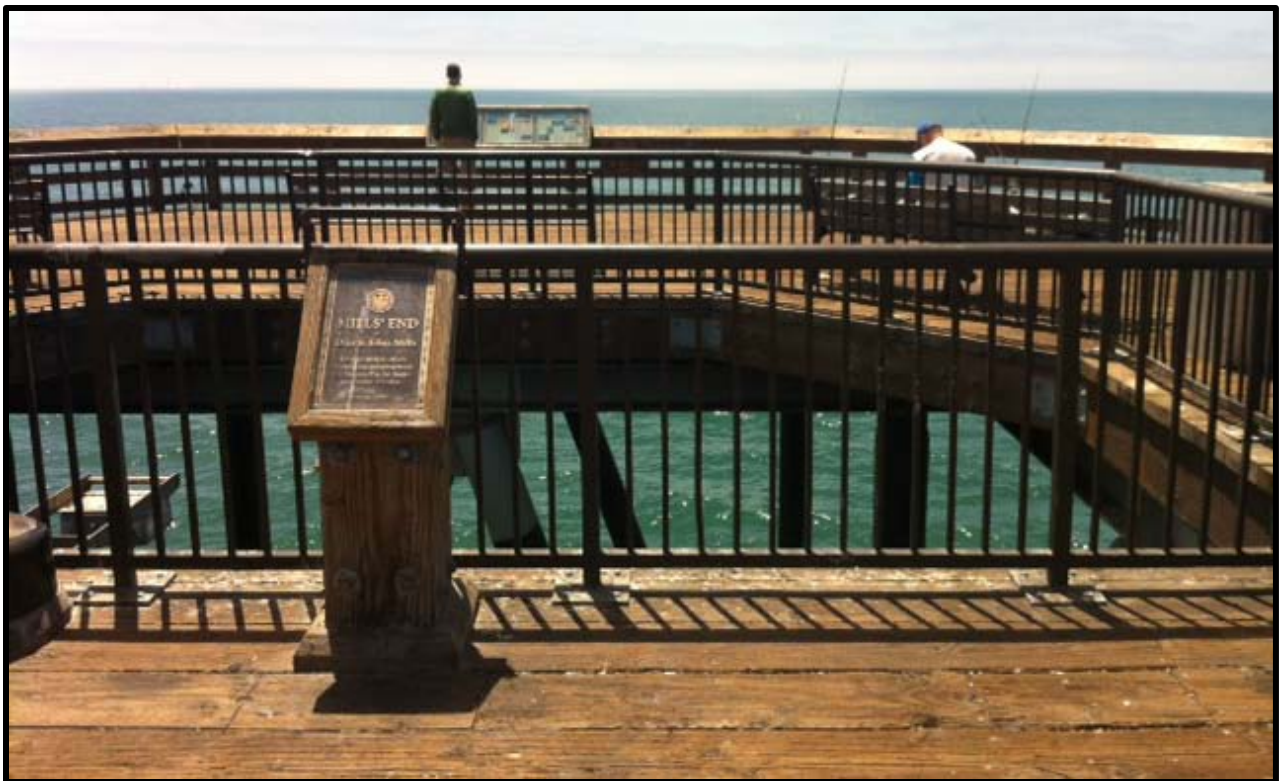
Pier 21
Stearns Wharf Santa Barbara



Pier 21 Stearns Wharf Santa Barbara



Pier 22
Ventura Pier



Pier 22 Ventura Pier



Pier 23
Port Hueneme Pier



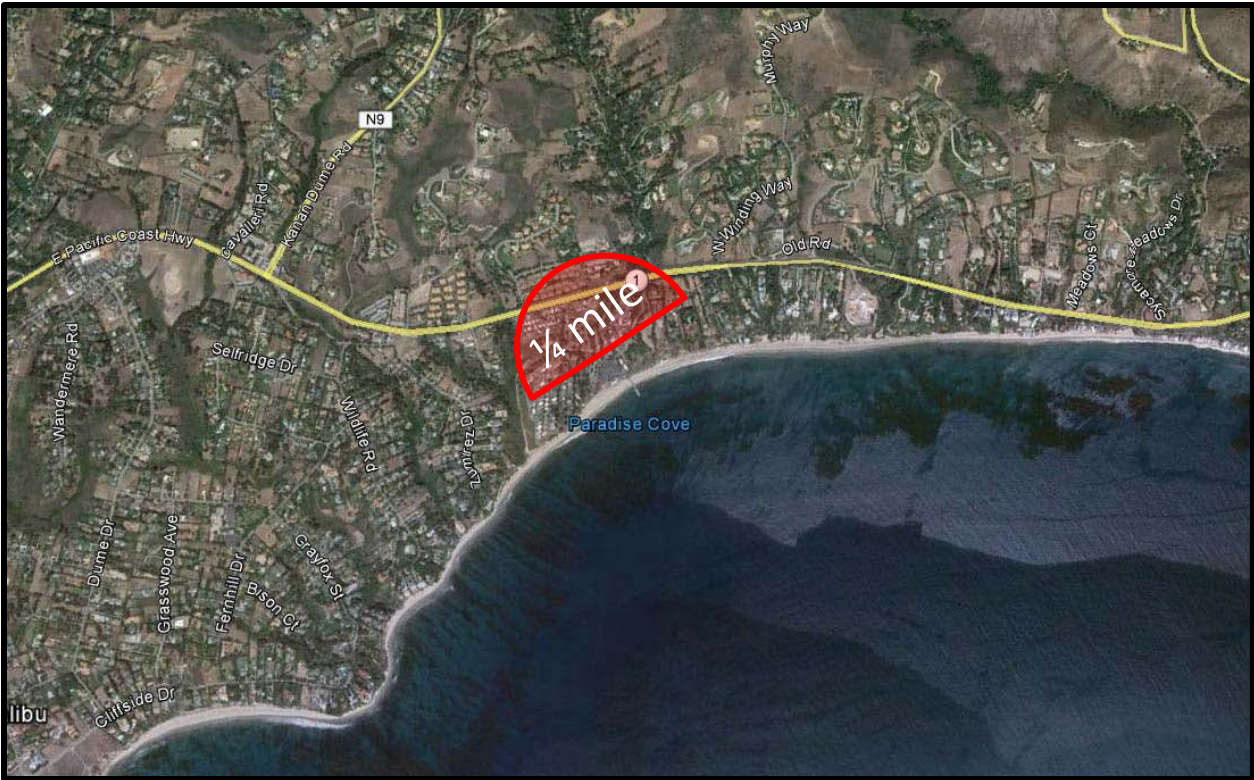
Pier 23 Port Hueneme Pier



Pier 24
Malibu Paradise Cove Pier



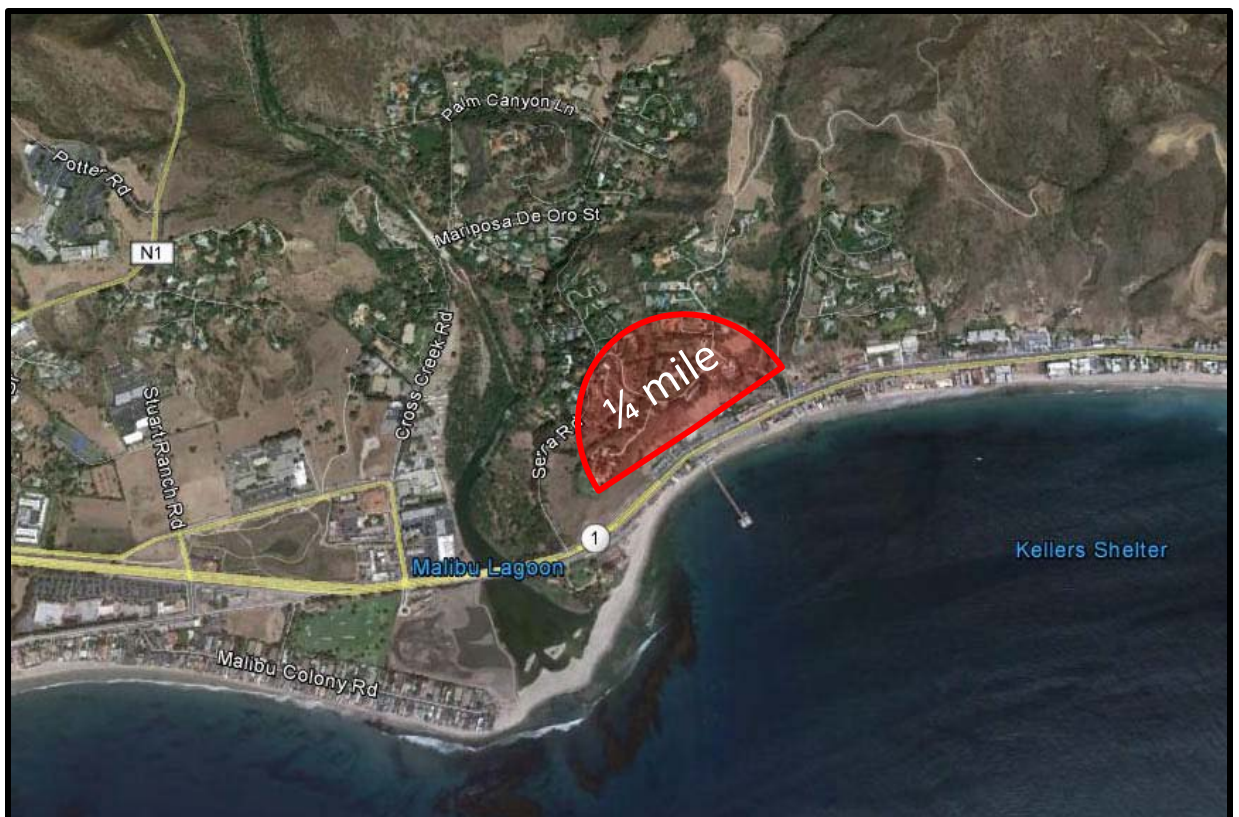
Pier 24 Malibu Paradise Cove Pier



Pier 25
Malibu Pier



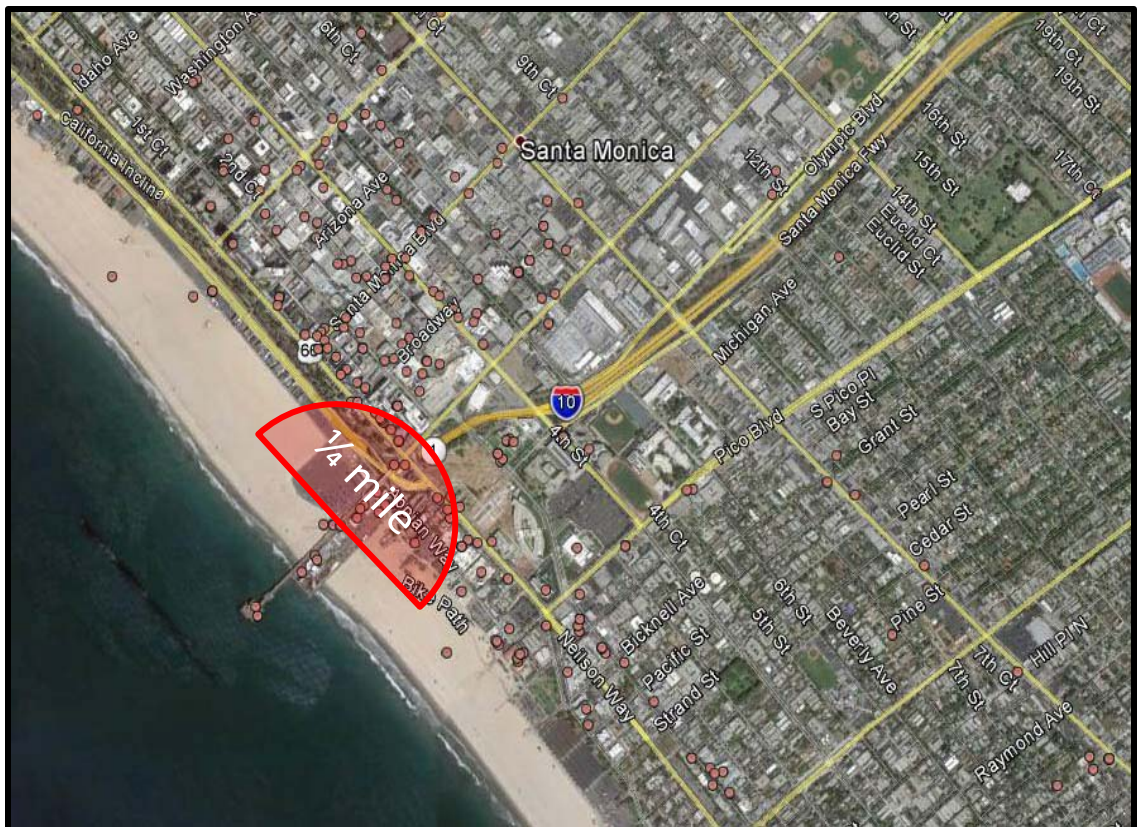
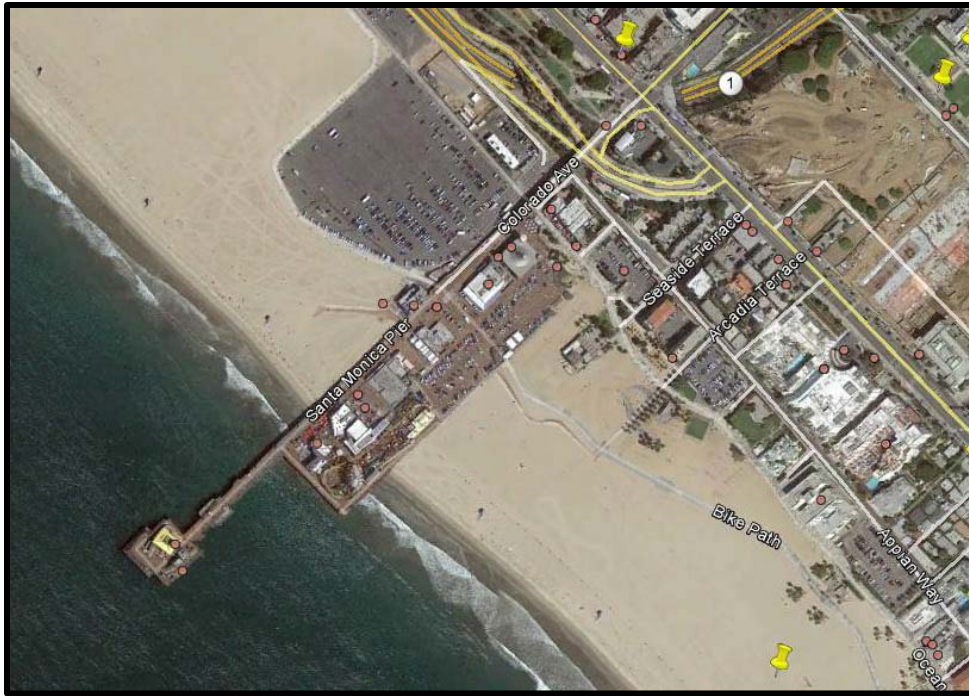
Pier 25 Malibu Pier



Pier 26
Santa Monica Pier



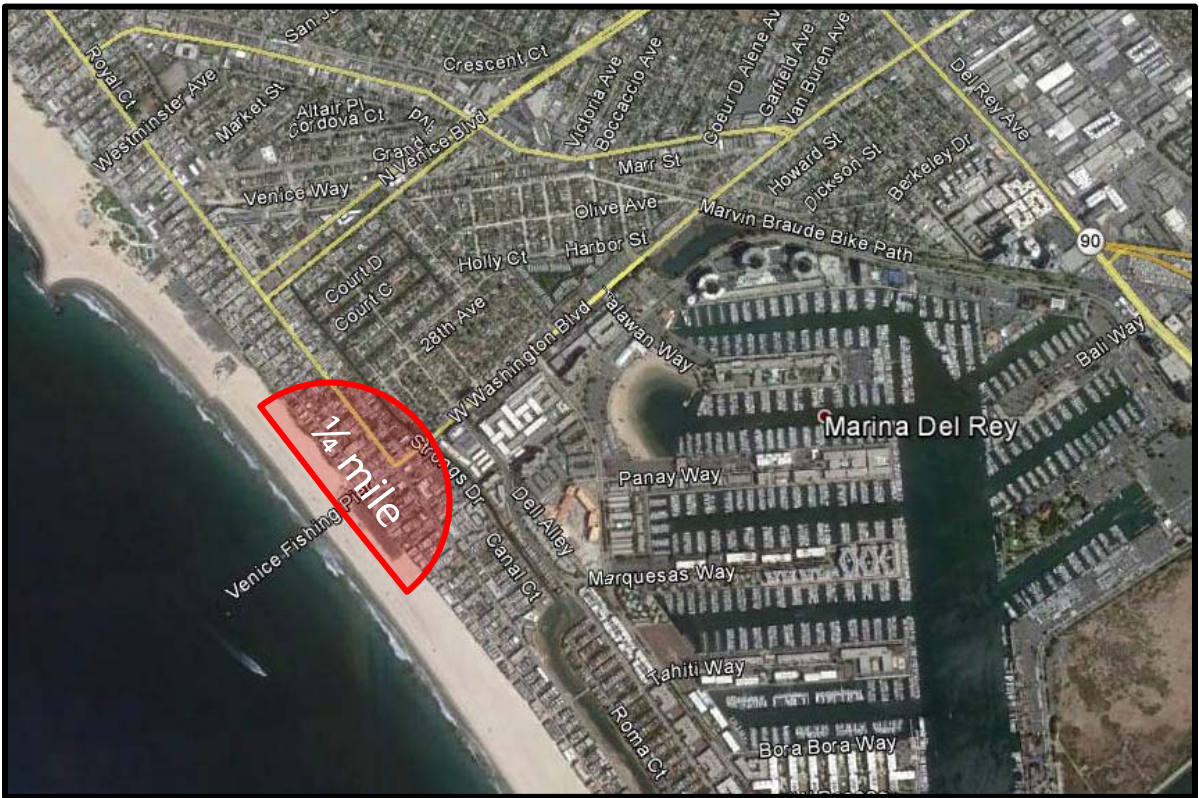
Pier 26 Santa Monica Pier



Pier 27
Venice Fishing Pier



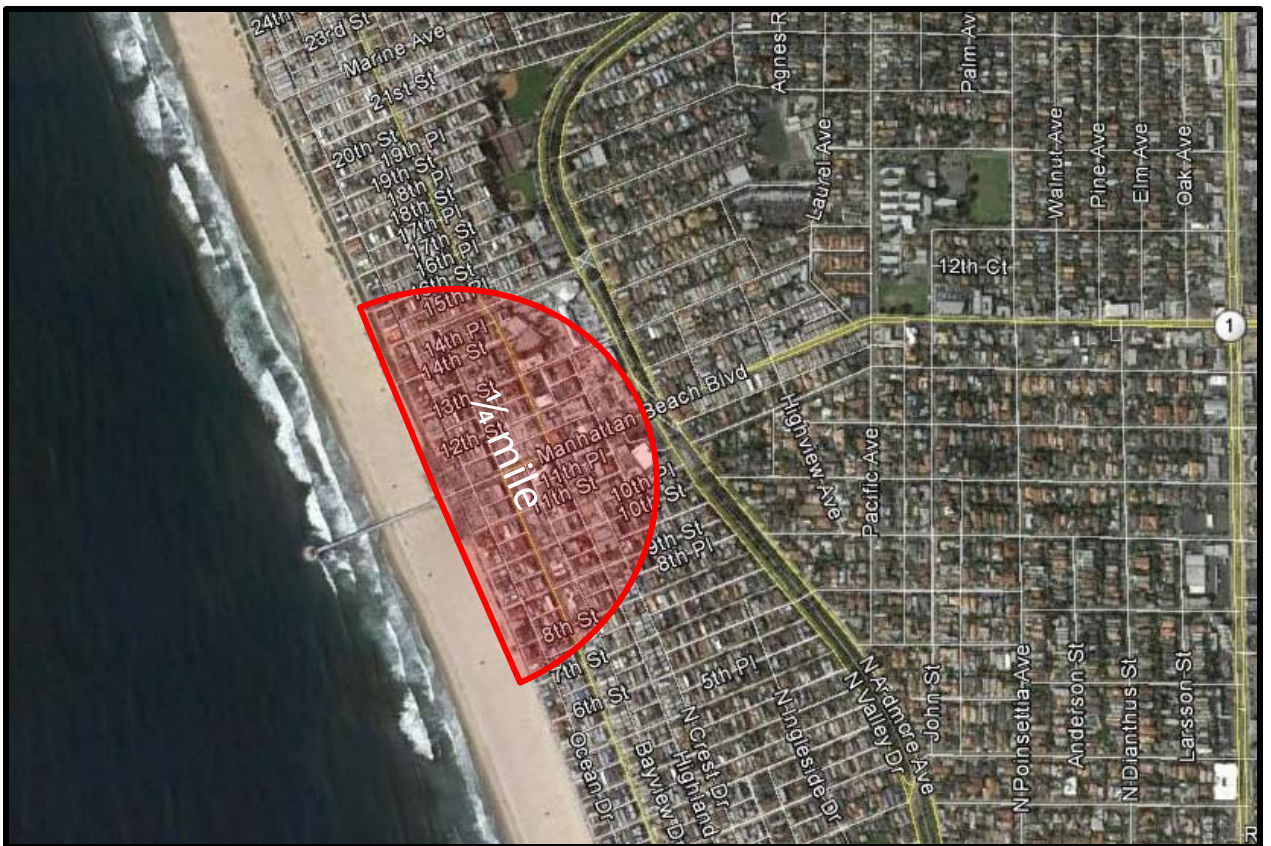
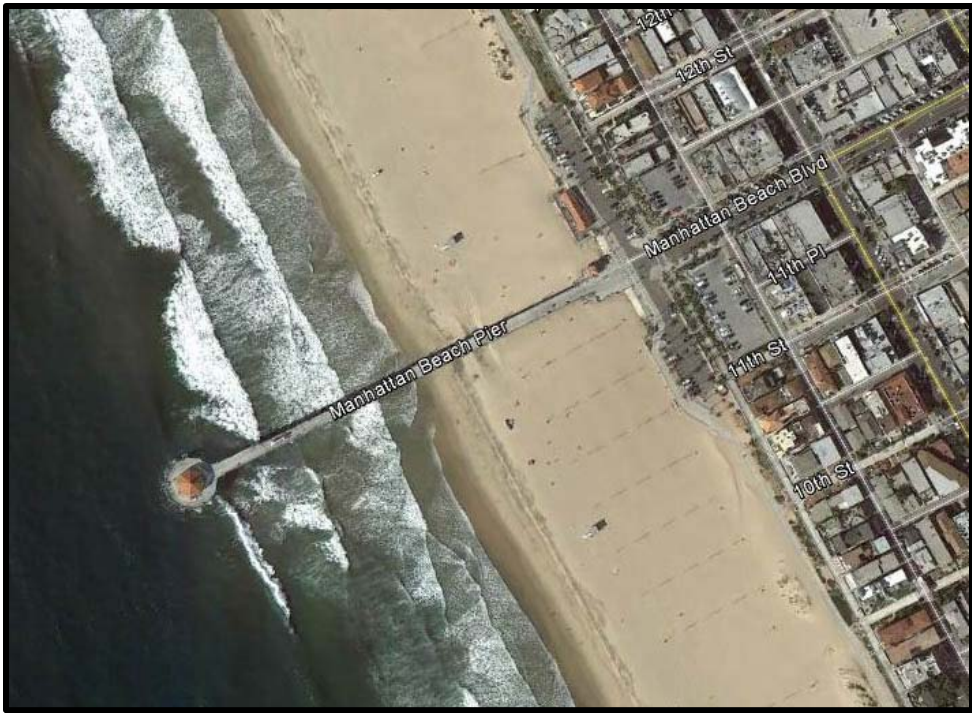
Pier 27 Venice Fishing Pier



Pier 28 Manhattan Beach Pier



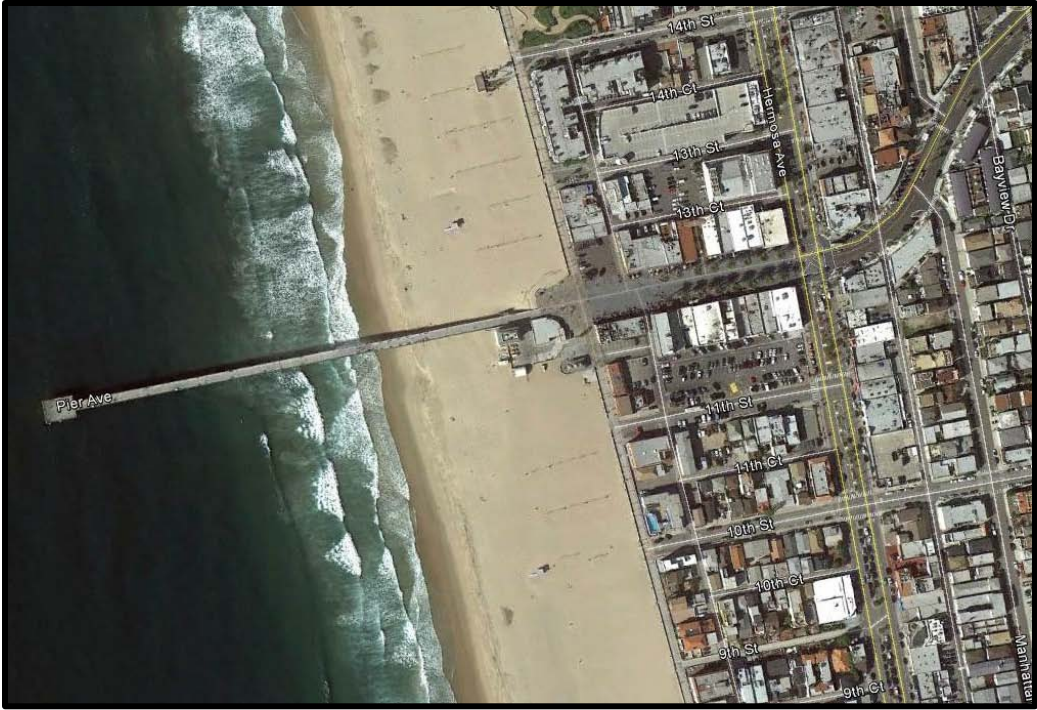
Pier 28 Manhattan Beach Pier



Pier 29
Hermosa Beach Pier



Pier 29 Hermosa Beach Pier



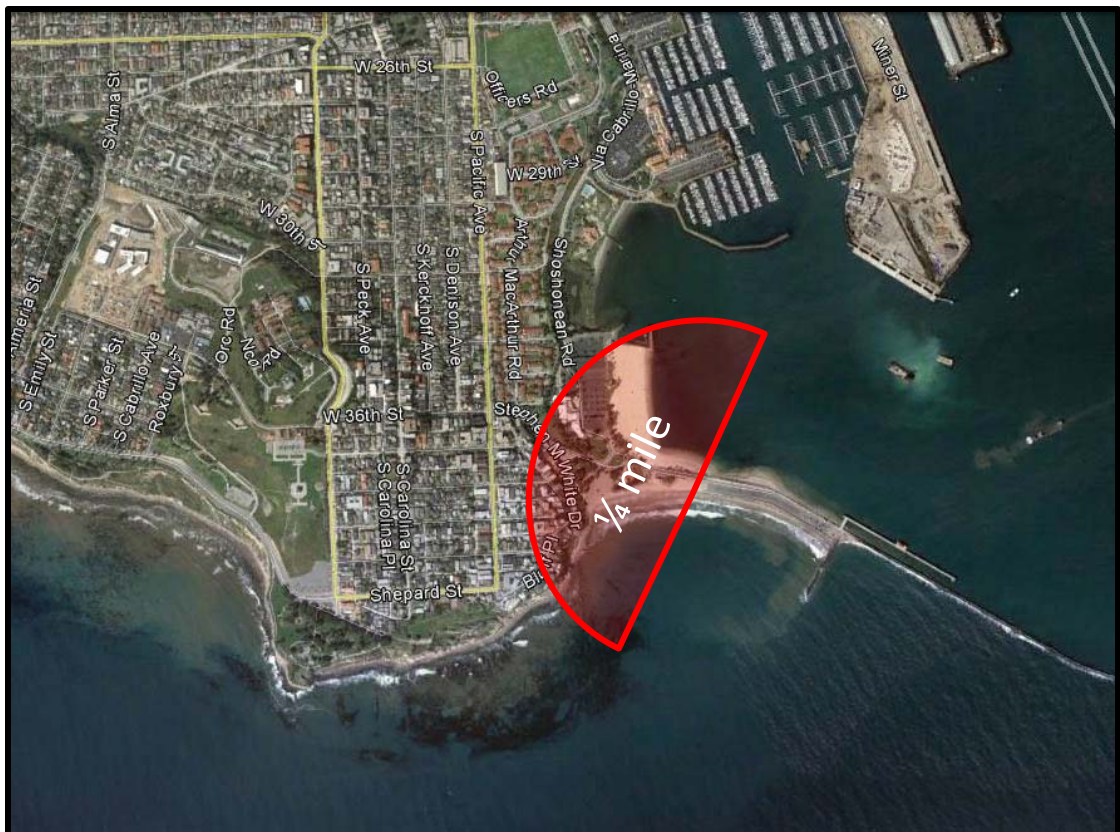
Pier 30
Redondo Beach Pier



Pier 31
Cabrillo Pier



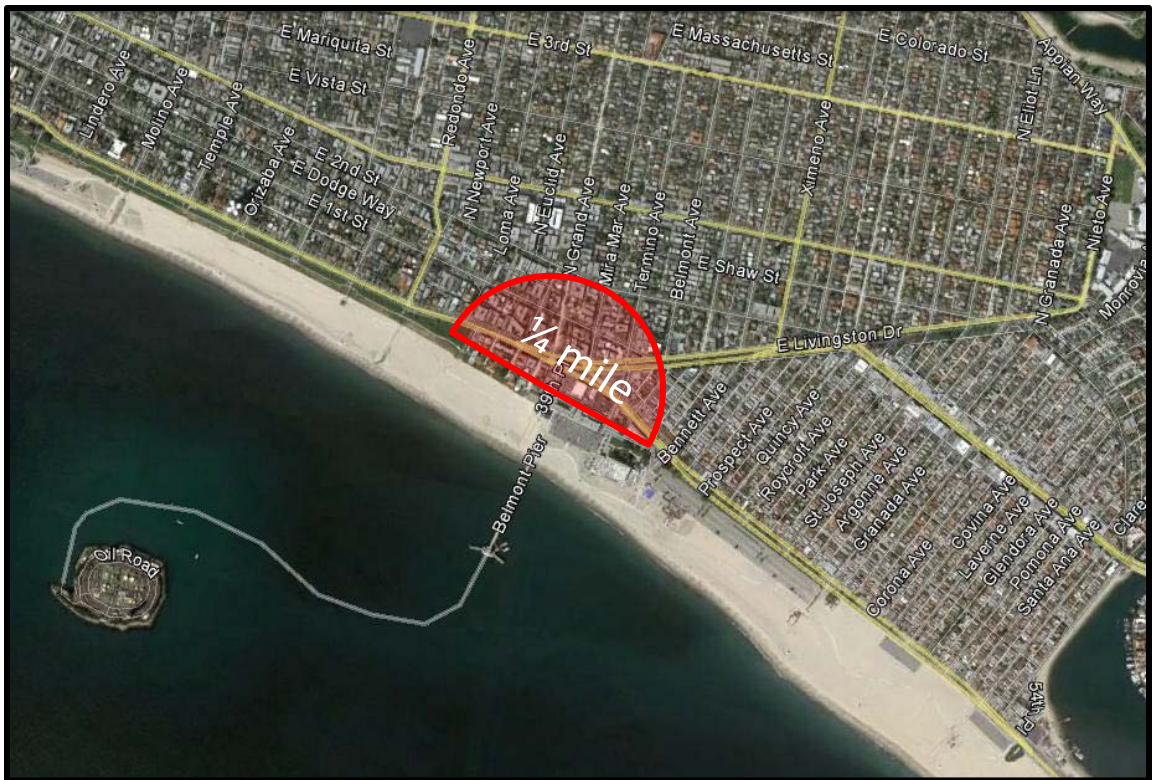
Pier 31 Cabrillo Pier



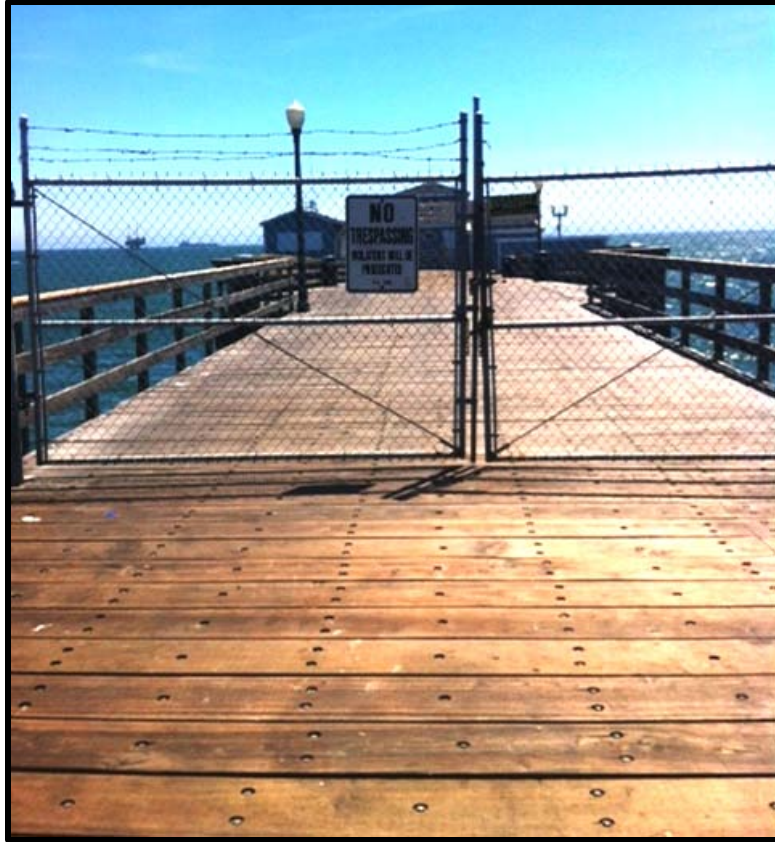
Pier 32
Belmont Pier Long Beach



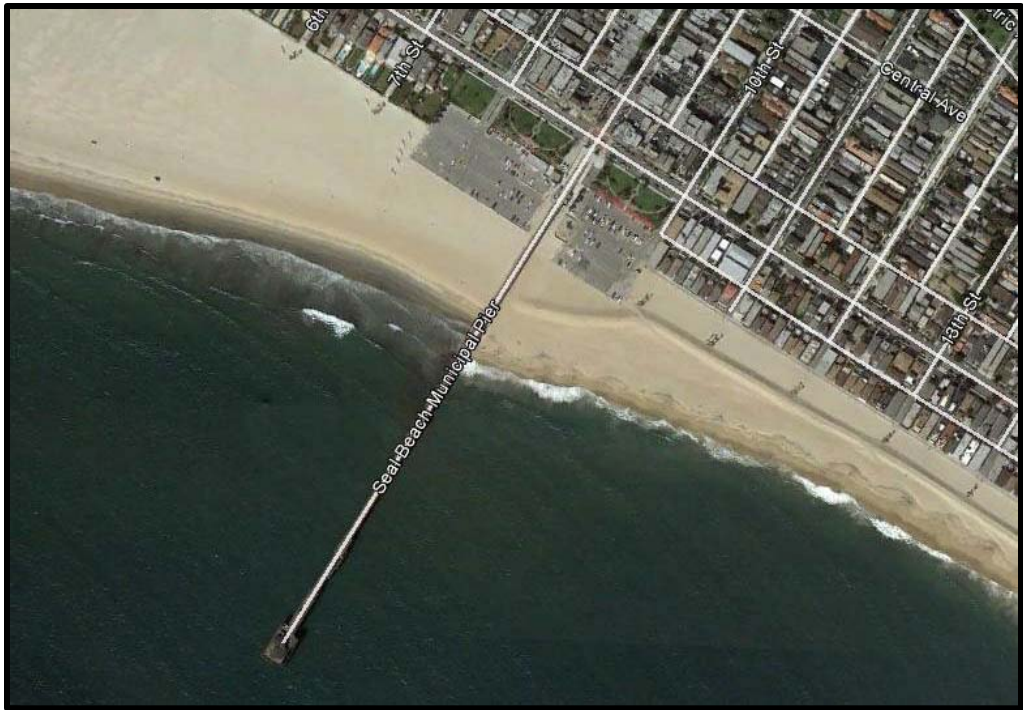
Pier 32 Belmont Pier Long Beach



Pier 33
Seal Beach Pier



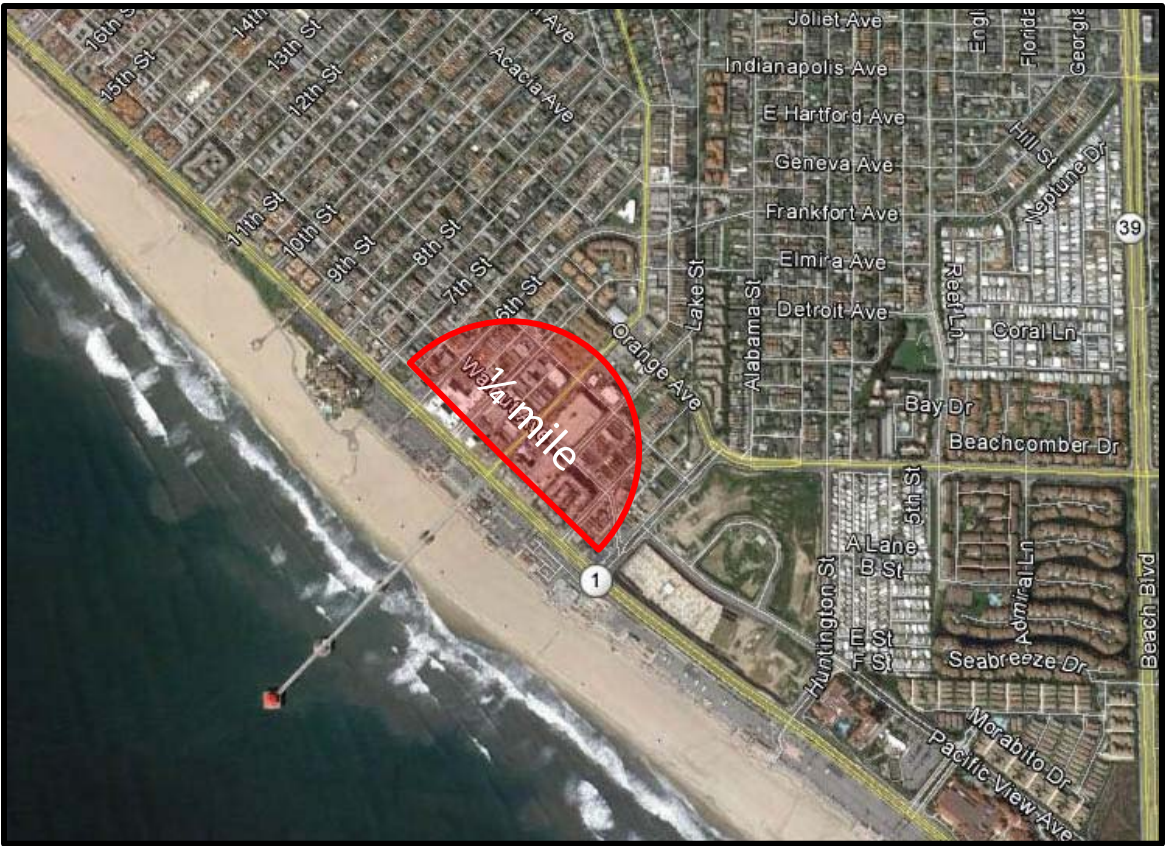
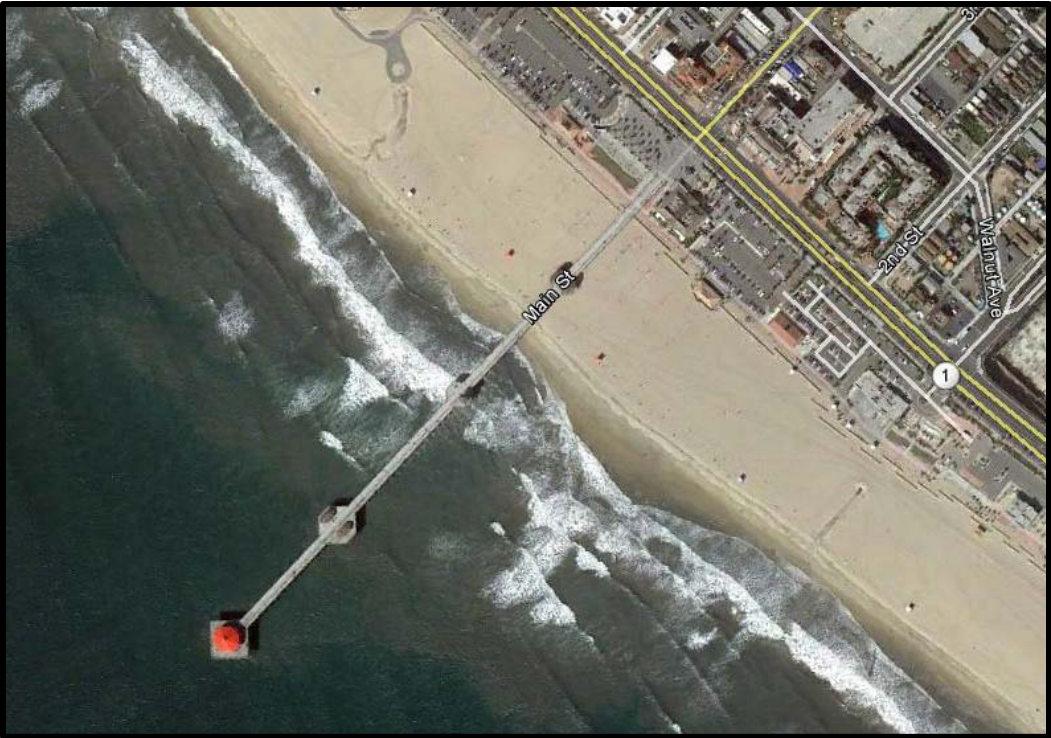
Pier 33 Seal Beach Pier



Pier 34 Huntington Beach Pier



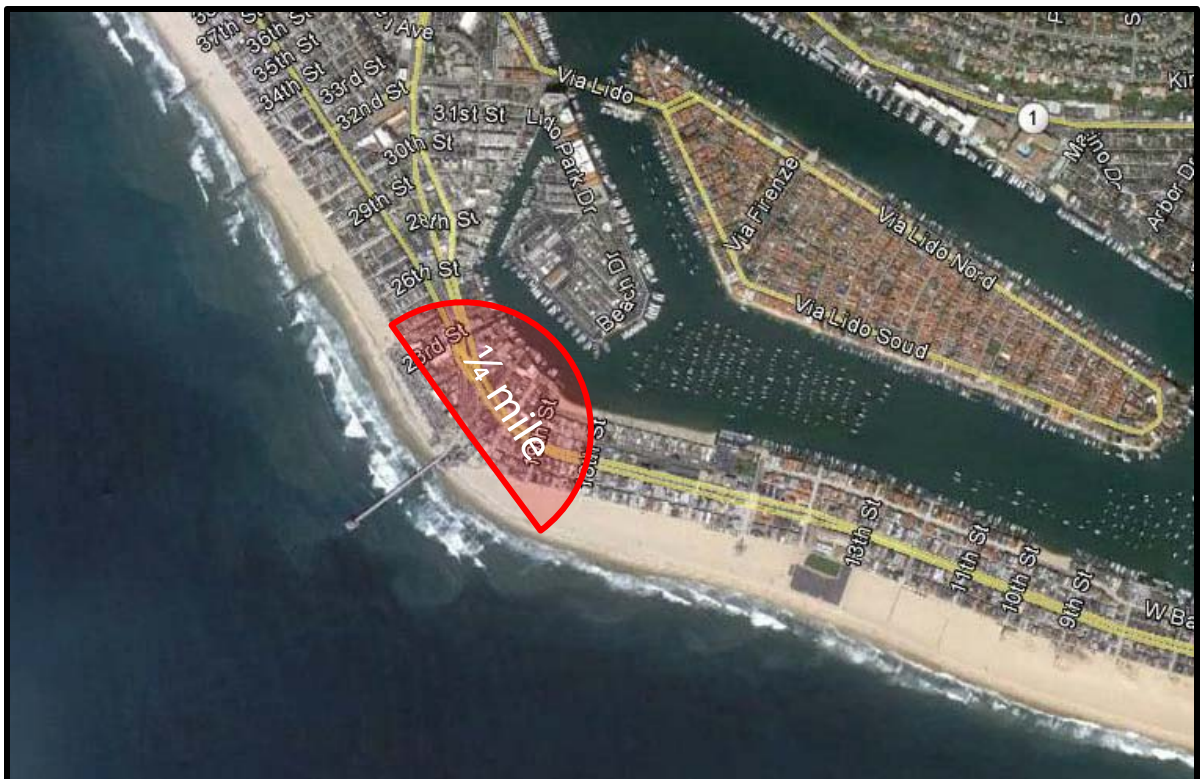
Pier 34 Huntington Beach Pier



Pier 35 Newport Pier



Pier 35 Newport Pier



Pier 36
Balboa Pier



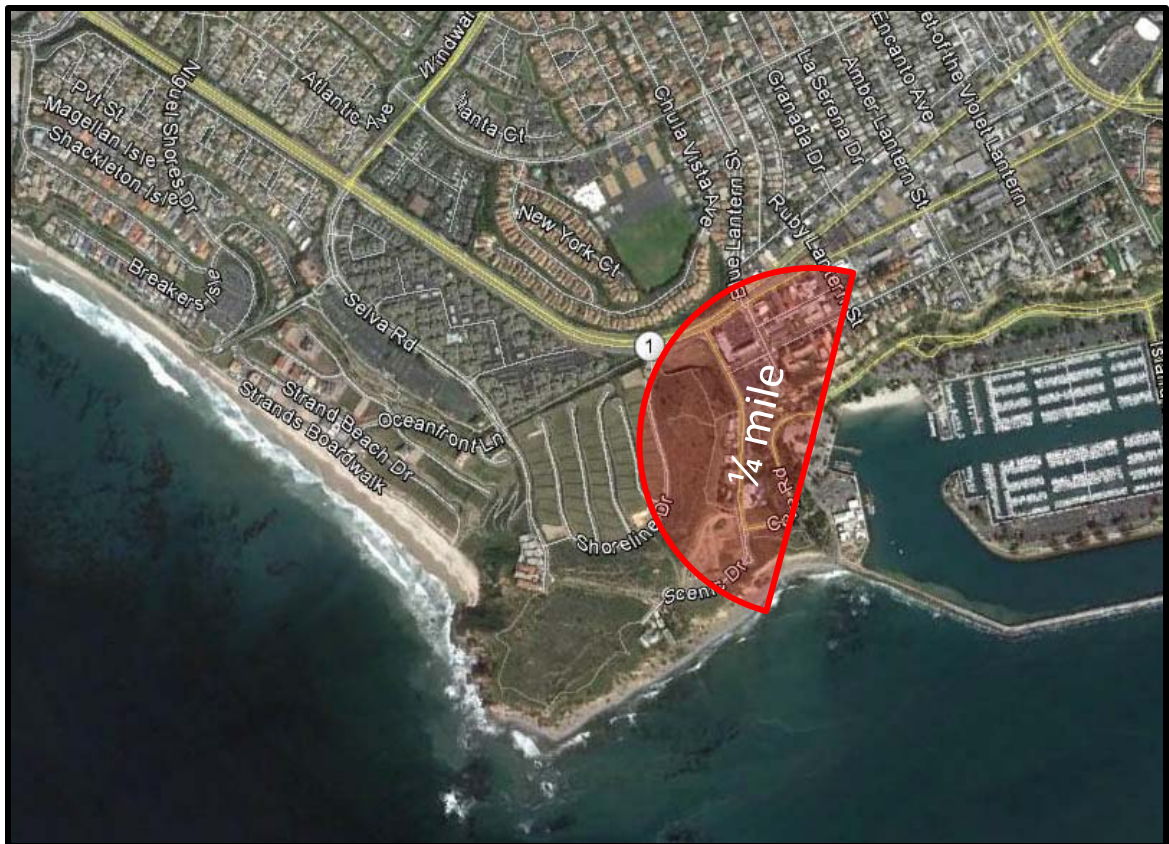
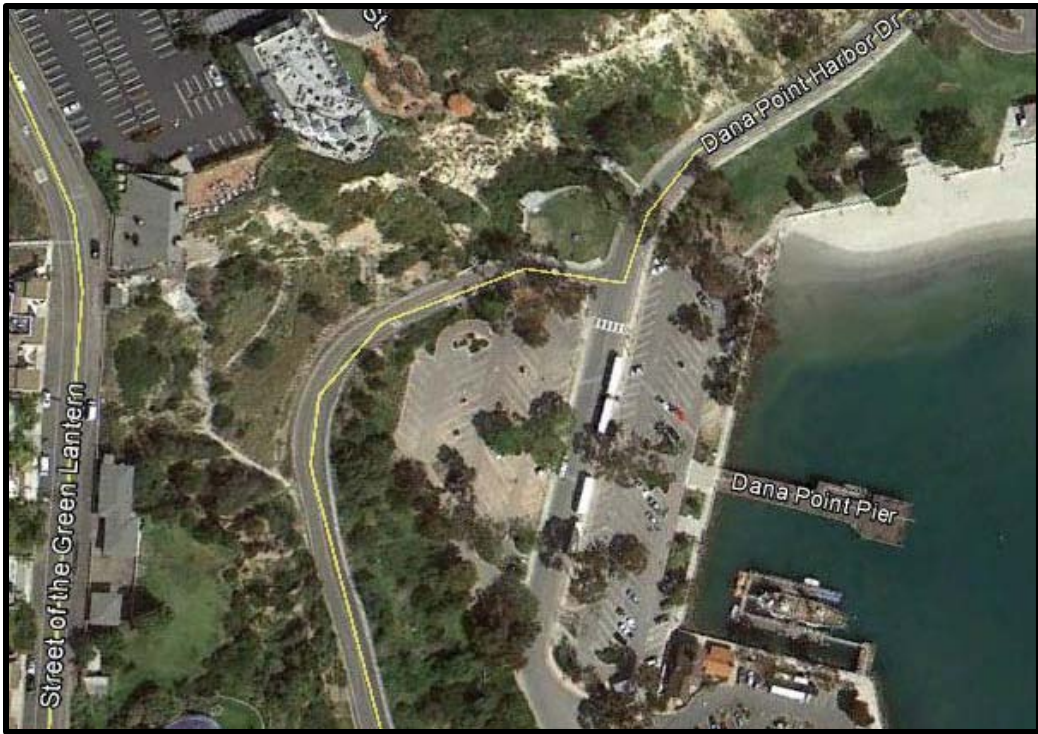
Pier 36 Balboa Pier



Pier 37 Dana Point Pier



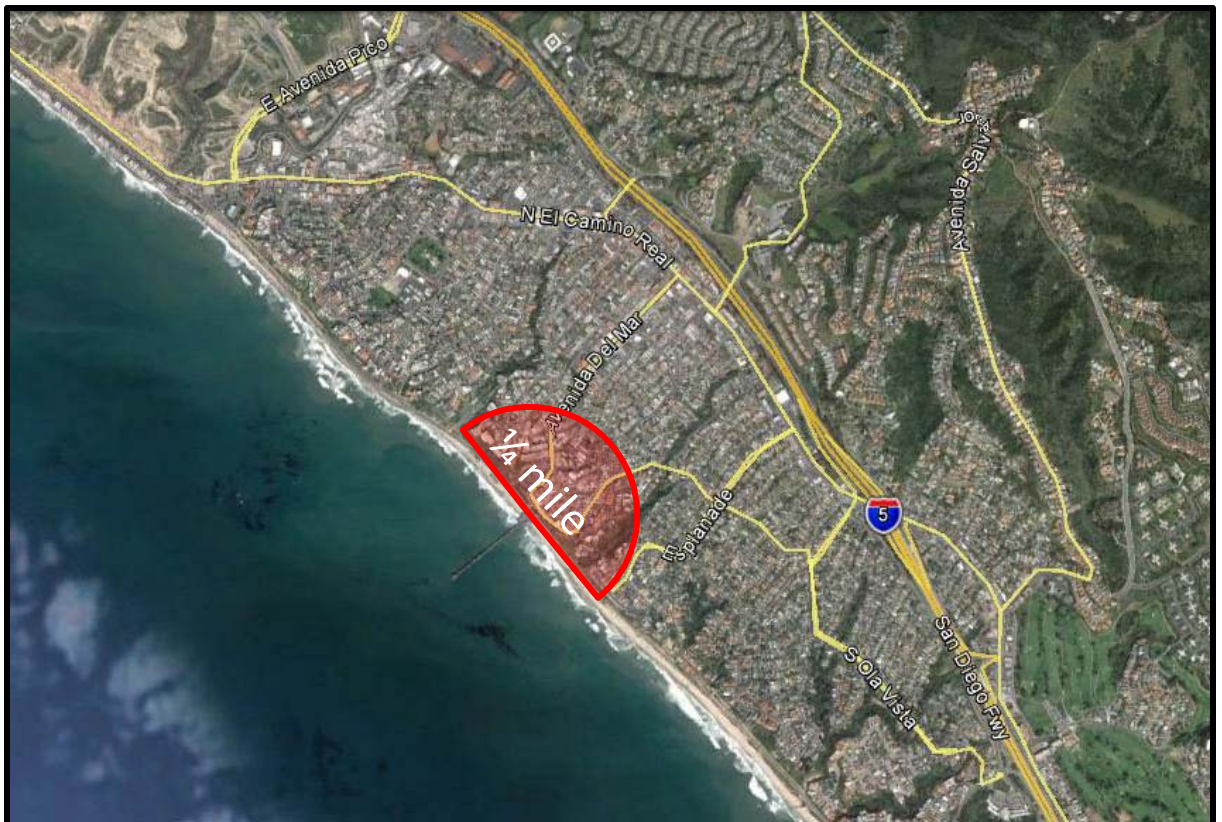
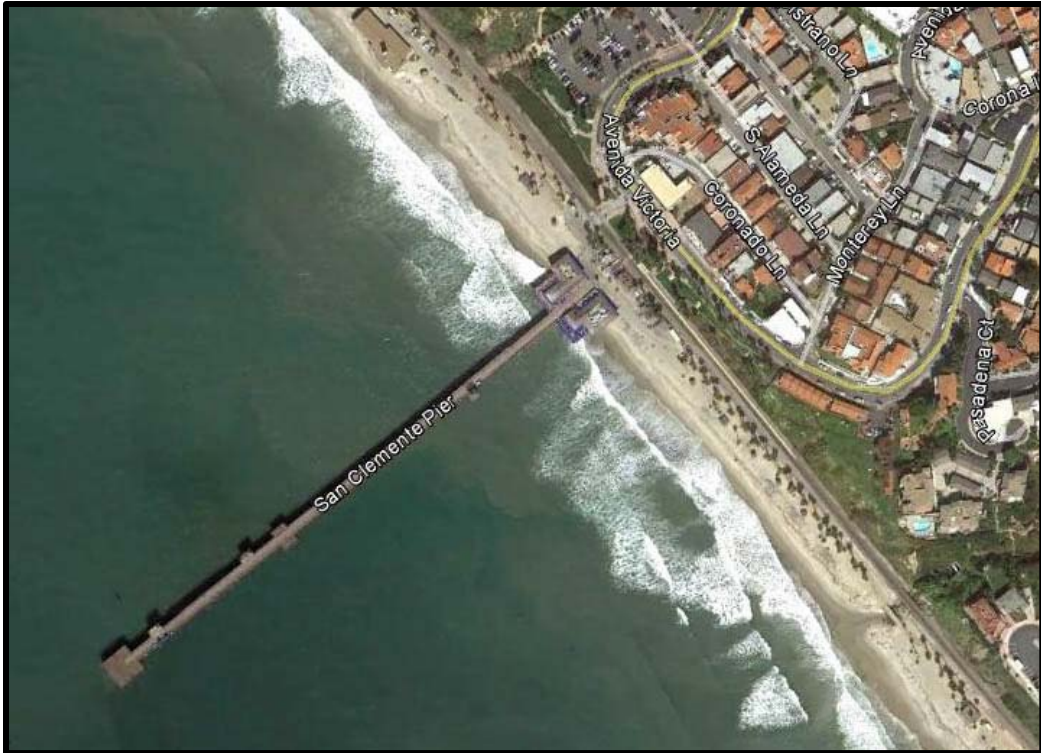
Pier 37 Dana Point Pier



Pier 38
San Clemente Pier



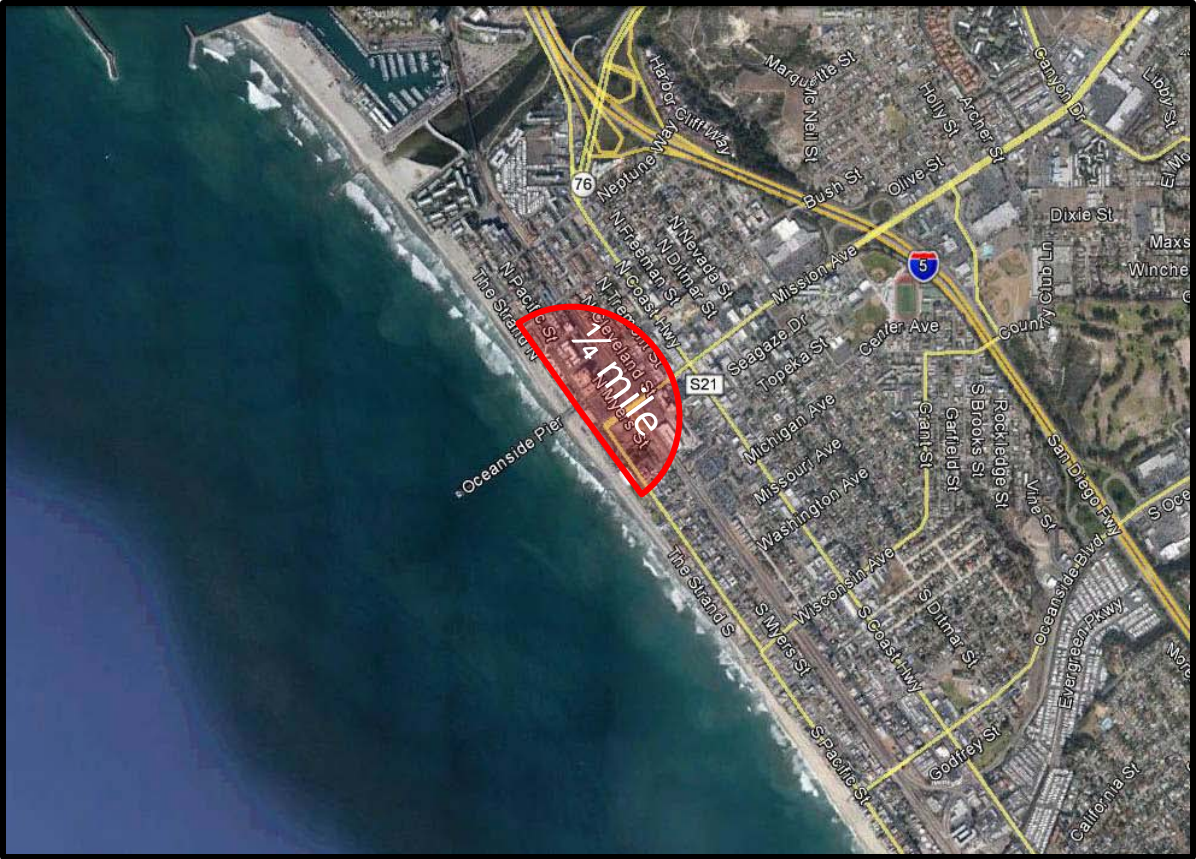
Pier 38 San Clemente Pier



Pier 39 Oceanside Pier



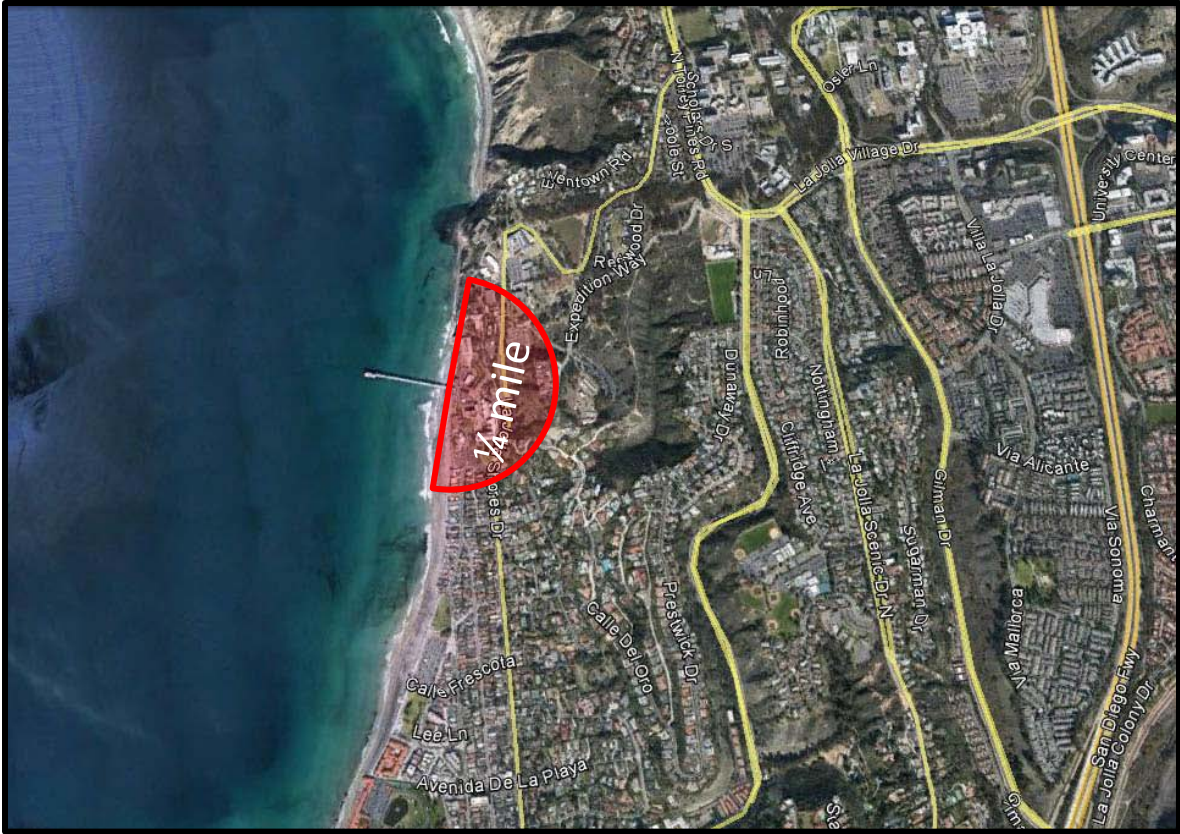
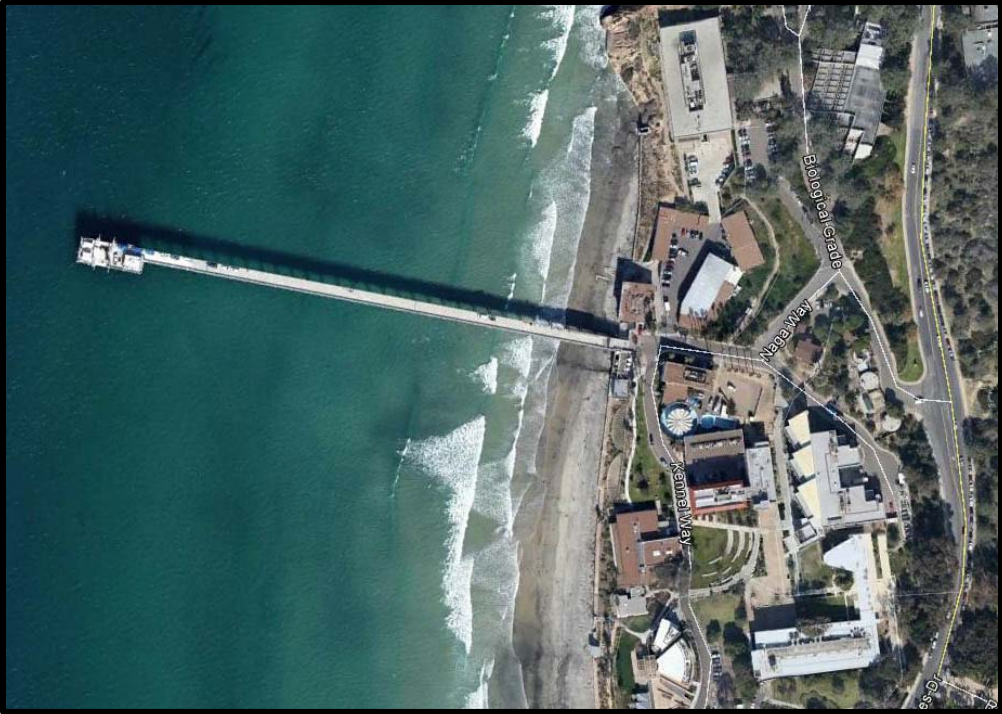
Pier 39 Oceanside Pier



Pier 40
La Jolla Scripps Pier



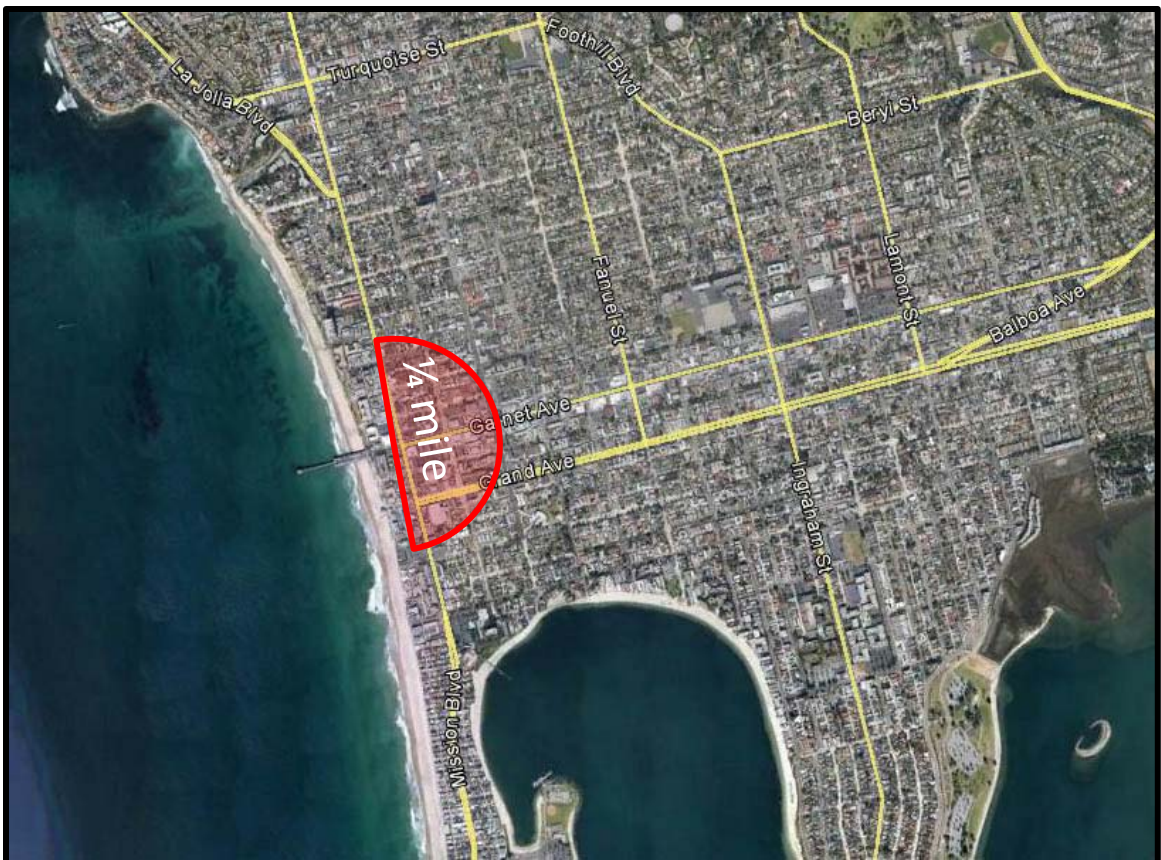
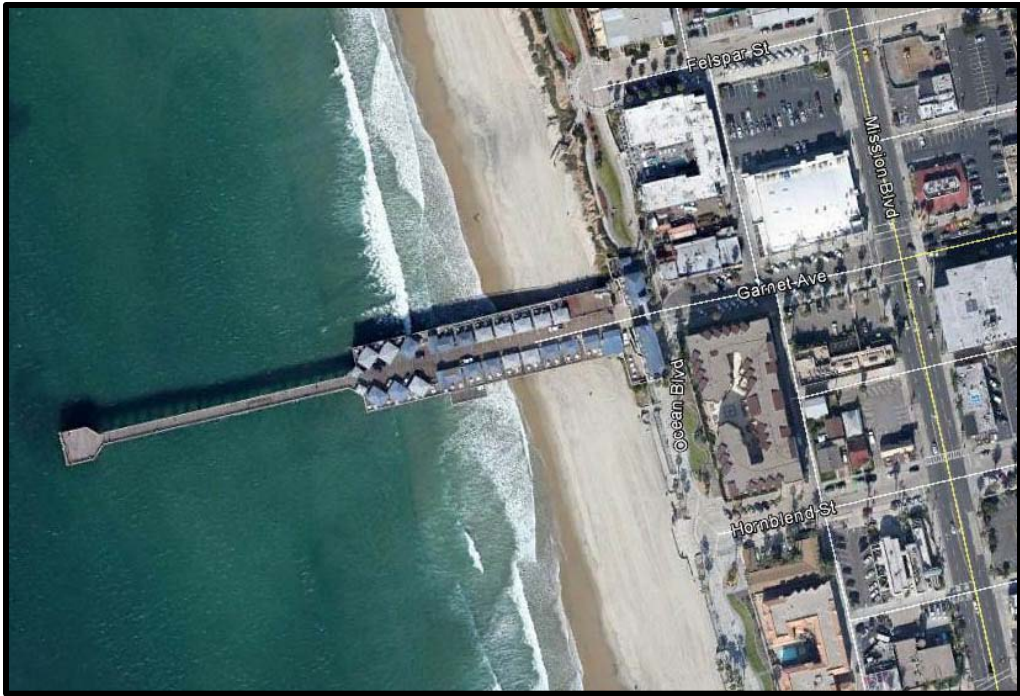
Pier 40 La Jolla Scripps Pier



Pier 41
Pacific Beach Crystal Pier



Pier 41 Pacific Beach Crystal Pier

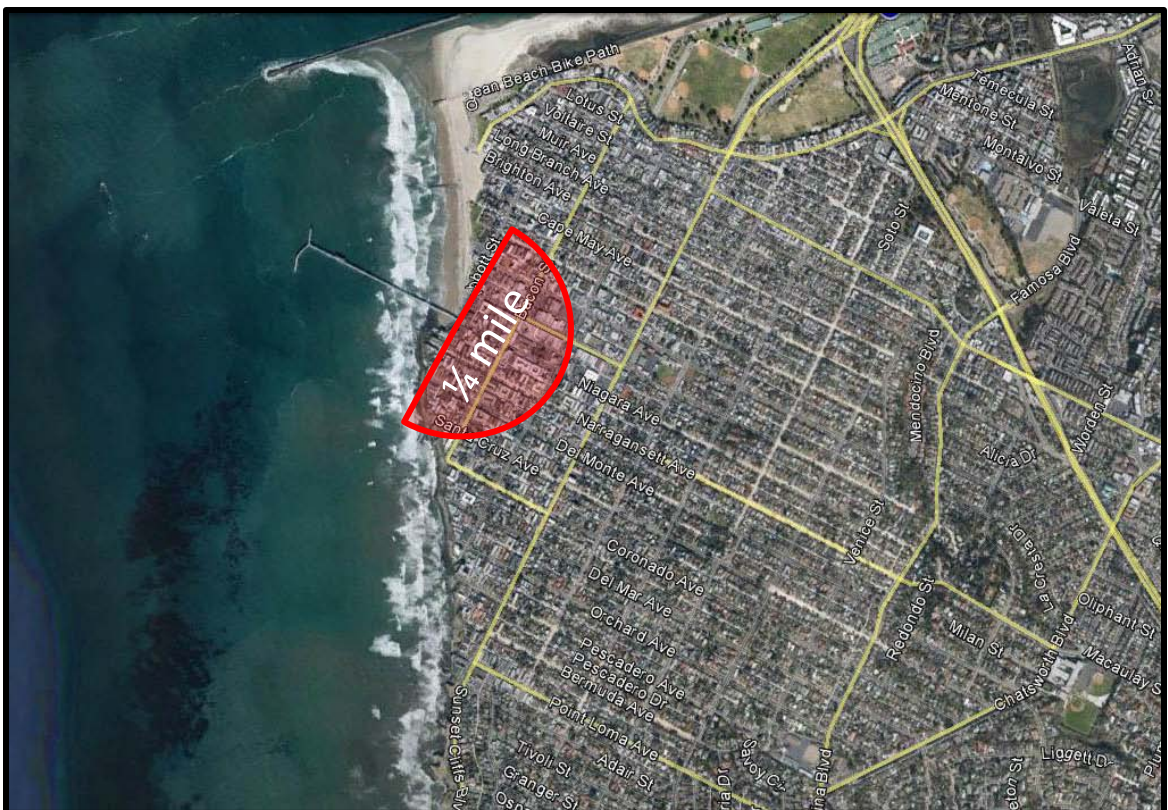
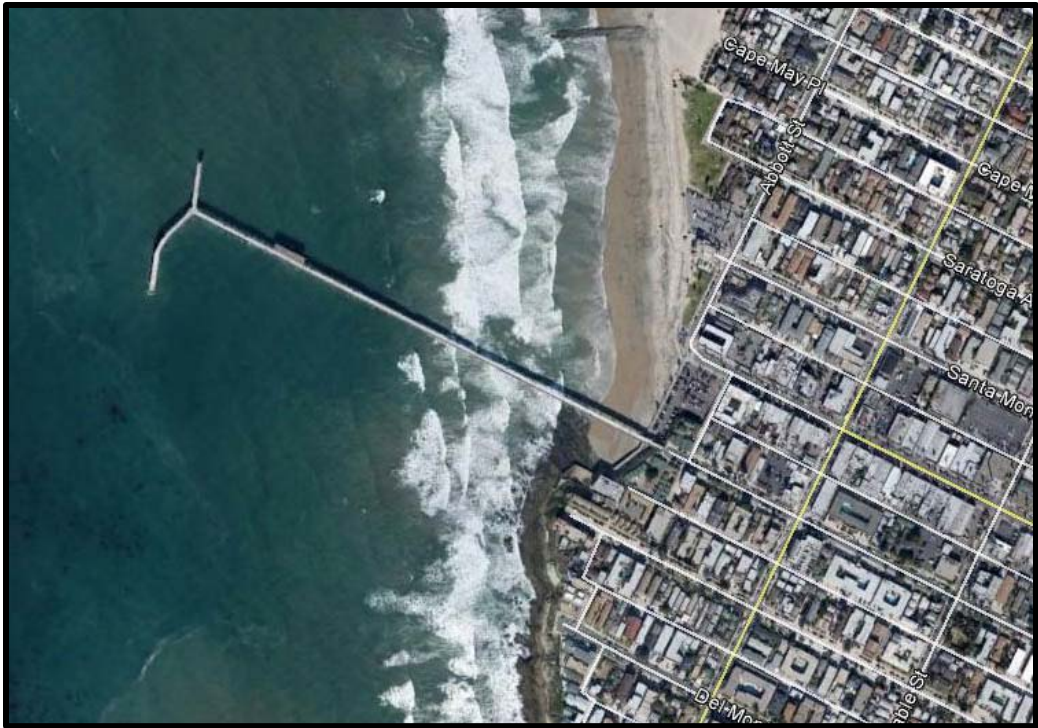


Pier 42
San Diego Ocean Beach Pier

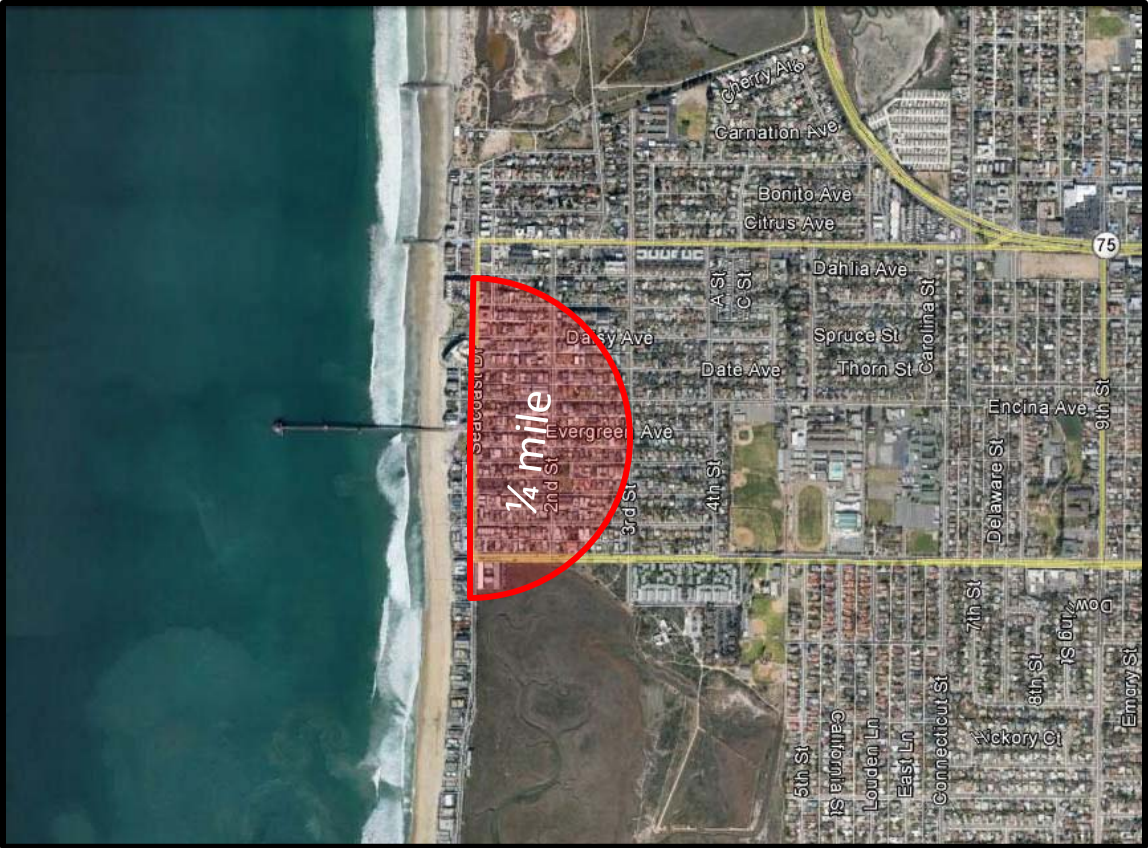
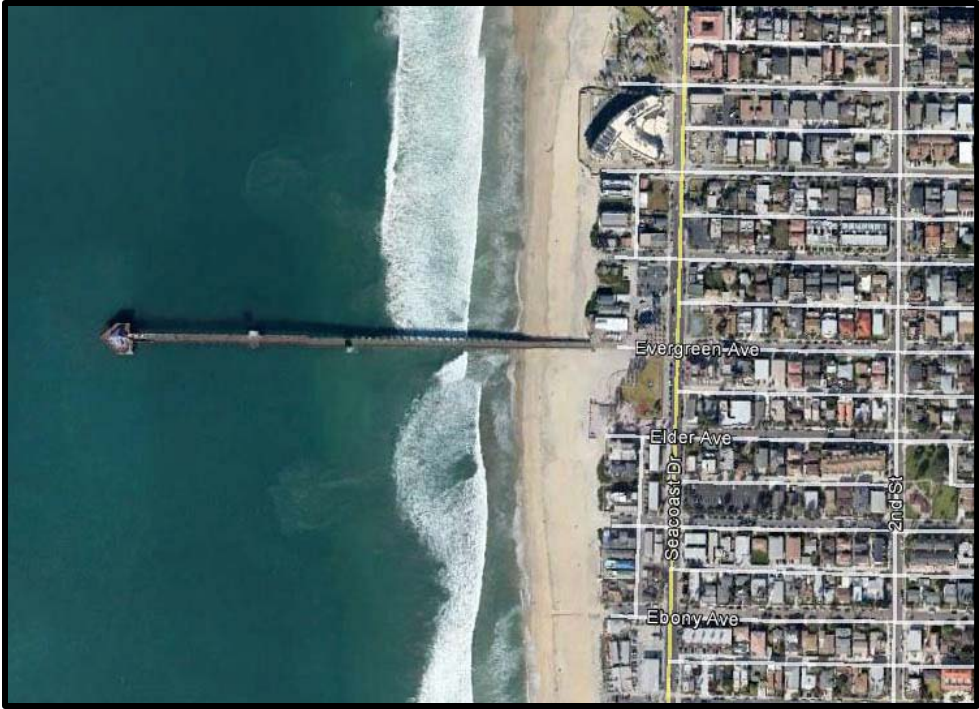


Pier 42

San Diego Ocean Beach Pier



Pier 43 Imperial Beach Pier



Pier 43
Imperial Beach Pier

