



TO: Mayor and Councilmembers
SUBMITTED BY: Luz “Nina” Buelna, Public Works Director
PREPARED BY: Melissa Angeles, Project Manager
SUBJECT: Hollister Avenue Old Town Interim Striping Project Update

RECOMMENDATION:

Receive an update on the Hollister Avenue Old Town Interim Striping Project performance.

BACKGROUND:

The City Council approved the project and preliminary design for the Hollister Avenue Old Town Interim Striping Project (Project) in January 2021. The Project was developed based on the Hollister Avenue Complete Streets Corridor Plan, which resulted from an 18-month public outreach process that included surveys, workshops, stakeholder meetings, and walking and biking tours. This outreach effort helped shape street design concepts aimed at improving multi-modal access and parking efficiency, ultimately guiding the development of the Project. The Project included reducing travel lanes from two lanes to one lane in each direction, increasing on-street parking with angled 90-minute spaces, and installing Class II bike lanes on Hollister Avenue between Fairview Avenue and Kinman Avenue. The proposed improvements focus on the following key goals:

- Increase parking spaces and availability
- Reduce traffic speeds
- Reduce collisions
- Improve conditions for bikes and pedestrians
- Maintain traffic flow

Public Works staff proposed implementing changes to Hollister Avenue in Old Town using easily adjustable, cost-effective materials. Traffic conditions were studied to assess how well the Project met its goals, and the resulting street configuration could help support future grant funding opportunities for a permanent streetscape project.

The City Council approved the plans and specifications for the Project and authorized staff to call for bids in April 2023. No bids were received during the Project’s first advertisement, so the Project was rebid in July 2023. The two bids received were 118% and 144% above the engineer’s estimate. The City Council rejected all bids and directed

staff to incorporate the Project into Project Connect through a construction change order. Public Works staff negotiated the change order, resulting in a reduction of approximately \$2 million in construction costs. The Project was implemented on July 12, 2024. Modifications, including three additional parking spaces and left turn accommodations for school buses at the Goleta Community Center, were completed in October 2024.

In preparation for the implementation of this Project, Public Works staff collected traffic volume and speed data on Hollister Avenue and the adjacent roadway network in October 2022 to serve as a baseline for pre-Project traffic conditions and for comparison with post-project traffic conditions. Public Works staff have monitored traffic conditions throughout Old Town and Project Connect construction areas. Signal timing adjustments have been made all along the Hollister Avenue corridor between Fairview Avenue and Ward Drive as necessary. Operational modifications have also been made at the Hollister Avenue and State Route (SR) 217 Southbound Ramps to improve traffic flow due to construction interruptions.

Staff collected traffic data from late 2024 to early 2025 and again from late 2025 to early 2026 to assess how the striping changes have affected traffic conditions in Old Town. This report summarizes this data and provides information on how the project is meeting its goals.

Outreach

Staff provided an update on the Project at the March 18, 2025, City Council meeting. At that time, staff reported that the Project included extensive community stakeholder involvement and public outreach. In total, nine (9) community meetings were held between 2018 and 2024. When the Project was incorporated as a change order to Project Connect, outreach efforts were managed by the Project Connect outreach team. These efforts included in-person visits to over 100 Old Town businesses, postcard mailers to over 2,000 parcels, articles in the Monarch Press, media releases, personalized outreach to the Santa Barbara Metropolitan Transit District, Goleta Unified School District, private and charter schools within the project area, Goleta Community Center, Santa Barbara South Coast Chamber of Commerce, Greater Santa Barbara Hispanic Chamber of Commerce, and property managers of impacted multi-family residential properties. The dedicated Project webpage was regularly updated with construction details, and a dedicated phone number and email address were maintained to respond to public inquiries.

As previously reported, between May and November 2024, the City received 121 public inquiries regarding the Project. The majority (75) expressed concerns primarily about angled-back-in parking and traffic impacts. Ten (10) inquiries were compliments, appreciating the safety improvements, while the rest were general questions. Interest peaked in July, with an average of nineteen (19) weekly inquiries, but declined afterward, with only seven (7) inquiries recorded between November 2024 and February 2025.

Since that time, feedback has remained limited. Between March 2025 and March 2026, the City has received a total of ten (10) inquiries. These comments were primarily related

to concerns and dislike of the back-in angled parking. Additional feedback included one request for Americans with Disabilities Act (ADA)-accessible parking in Old Town and one request for parking signage in Spanish.

DISCUSSION:

At the time of preparation of this report, the Project has been in place for approximately 18 months. Construction of Project Connect has continued in the Project’s vicinity. As Project Connect construction moves forward, traffic patterns have changed and will continue to change in future phases. The relatively short time frame and ongoing construction traffic affect the ability to draw meaningful conclusions about the striping change’s impact on traffic safety. However, the data shows positive trends toward the Project achieving its stated goals. Public Works collected pre-project data in 2022. Staff and the City’s traffic consultants have collected post-project traffic and parking data in Old Town during late 2024/early 2025 and late 2025/early 2026 to track project performance.

Traffic Volumes

The Hollister Avenue Complete Streets Corridor Plan determined that approximately two-thirds of Old Town Hollister Avenue traffic trips were associated with residences or businesses in Old Town. The remaining third of traffic traveled through Old Town to other areas.

Through analysis of travel patterns, Public Works staff hypothesized that the lane reductions on Hollister Avenue could cause nearly half of these through trips to choose other routes, reducing the overall daily traffic volume by up to 15%.

The data shown in Table 1 demonstrate that daily traffic volumes have been reduced by approximately 12%, or by fewer than 2,200 daily trips, compared with pre-Project conditions. No analysis has been carried out to determine whether this overall reduction in volume is due to a reduction in through traffic, but this could be a component of future data collection. It is also difficult to determine whether this traffic reduction is due to the lane reductions in Old Town, the traffic staging for the Hollister Avenue Bridge Replacement Project, the SR 217 roundabouts, or other reasons not known at this time.

Table 1 – Hollister Avenue Old Town Daily Traffic Volumes Pre and Post Project

Condition	Daily Traffic Volume
Pre-Project (2022)	18,442
Post Project (24/25)	16,548
Post Project (25/26)	16,280
Change in Traffic Volumes	
	Percent Change
2024/2025 to 2025/2026	-1.6%
Pre-Project (2022) to 2025/2026	-12%

Data was collected on parallel routes to Hollister Avenue to determine whether the Project would divert significant traffic volumes. Table 2 shows the comparisons between the pre- and post-Project volumes. Volumes on these parallel routes increased after the restriping, but the data show these volumes are generally leveling off or decreasing, with a trend towards pre-project levels. While some parallel routes have experienced increases in traffic volumes, all observed volumes remain at or below 1,500 vehicles per day, a commonly referenced upper range for residential streets. These levels are within typical operating conditions for residential streets. Increased volumes on Armitos Avenue may be partially associated with the 2024 opening of Armitos Park and Community Gardens.

**Table 2 – Old Town Neighborhood Daily Traffic Volumes
Pre and Post Project**

	Armitos Avenue	Gato Avenue	Gaviota Street	Mandarin Drive
Pre-Project (2022)	729	819	571	1,308
Post Project (24/25)	920	753	818	1,524
Post Project (25/26)	917	915	763	1,430
Change In Traffic Volumes				
2024/2025 to 2025/2026	-	+22%	-7%	-6%
Pre-Project (2022) to 2025/2026	+26%	+12%	+34%	+9%

On-Street Parking

The Project increased the overall on-street parking supply by converting parallel parking along the north side of Hollister Avenue to back-in angled parking. In addition to increasing supply, 90-minute time restrictions were implemented in Old Town to support parking turnover in the commercial area.

As shown in Table 3, on-street parking increased by 19 spaces. Parking occupancy data collected in March 2026 indicates that peak occupancy occurs during the mid-morning period. Peak occupancy increased to 76%, compared to 52% in 2025 and 66% in the 2012 Walker Parking Study.

On the north side of Hollister Avenue, occupancy has increased between Orange Avenue and Tecolote Avenue, while the parking supply in this segment increased by more than 50%. Along the remainder of the north side, parking occupancy has remained generally consistent with 2025 levels and is lower than levels observed in 2012.

Table 3 – Old Town Hollister Avenue Parking Spaces and Peak Occupancy Pre and Post Project

	No. Spaces	Peak Occupancy
Pre-Project (2012)	69	66%
Post Project (January 2025)	88	52%
Post Project (March 2026)	88	76%
Change in Conditions		
January 2025 to March 2026	0%	24%
Pre-Project (2012) to March 2026	28%	10%

Traffic Speeds

Table 4 shows that the prevailing speed on Hollister Avenue has been reduced to under 30 mph. The number of drivers traveling more than 10 mph over the posted speed limit has been cut in half, to 1% of the traveling public.

Table 4 – Old Town Hollister Avenue Prevailing and Extreme Speeds Pre and Post Project

	85 th percentile mph	% >35 mph
Pre-Project	31.4	4%
Post Project (24/25)	28	2%
Post Project (25/26)	27	1%

Reported Collisions

Approximately 18 months of post-project collision data are available. Safety evaluations typically rely on multiple years of data, which is a limited dataset. Reported collision data show a decrease in total collisions compared to pre-project conditions. Injury collisions are lower than pre-project levels, with variation between post-project years. Bicycle-involved collisions are consistent with pre-project levels. One fatal pedestrian-involved collision was reported during the post-project period.

Table 5 – Old Town Hollister Avenue Reported Collision Summary Pre and Post Project

	Total	Fatal	Injury	Ped	Bike
Pre-Project	12	0	6	0	2
Post Project (24/25)	7	1	2	1	0
Post Project (25/26)	4	0	3	0	2
Change in Reported Collisions					
2024/2025 to 2025/2026	-43%	-100%	+50%	-100%	0%
Pre-Project (2022) to 2025/2026	-67%	-	-50%	-	0%

Alternative Travel Modes

Pedestrian and bicycle activity during commute hours has increased. Counts at the Hollister Avenue and Pine/Nectarine Avenue intersection show increases in bicycle activity (Table 6A) during the morning peak hour and in pedestrian activity (Table 6B) during the afternoon peak hour.

**Table 6A – Hollister Avenue and Pine/Nectarine Avenue
Peak Hour Bike Volumes
Pre and Post Project**

Condition	AM	PM
Pre-Project	25	65
Post Project (24/25)	36	70
Post Project (25/26)	71	85
Change in Bicycle Volumes		
2024/2025 to 2025/2026	+44%	+21%
Pre-Project (2022) to 2025/2026	+184%	+31%

**Table 6B – Hollister Avenue and Pine/Nectarine Avenue
Peak Hour Pedestrian Volumes
Pre and Post Project**

Condition	AM	PM
Pre-Project	80	103
Post Project (24/25)	89	172
Post Project (25/26)	149	320
Change in Pedestrian Volume		
2024/2025 to 2025/2026	67%	86%
Pre-Project (2022) to 2025/2026	86%	211%

Vehicle Delay / Level of Service (LOS)

Analysis of Old Town intersections in 2022 found that most intersections operated at a level of service (LOS) B, with an average motorist delay of up to 20 seconds during the peak hour. Orange Avenue and Rutherford Avenue operated at LOS C (up to 35 seconds of average delay) during the peak hour. Public Works staff projected that the overall level of service along the corridor would degrade with the reduction in lanes, but with anticipated reductions in through traffic on Hollister Avenue, left-turn restrictions, and signal timing adjustments, an LOS C could be maintained throughout the corridor. Using recent traffic volume data, calculations at Hollister Avenue and Pine/Nectarine Avenue show that Old Town's intersection with the highest volumes operates at LOS C. (23 seconds of average delay).

There have been and will continue to be instances when the Hollister Avenue corridor performs below this level of service. Queues in the eastbound direction extending from

SR 217 into Old Town have occurred in association with lane reductions and traffic control required for construction activities at the SR 217 ramp intersections with Hollister Avenue. The roundabouts were placed into operation on March 1, 2026, and are currently in an interim configuration that does not reflect final operating conditions. Traffic data summarized in this report were collected prior to and during the early implementation of these conditions and do not include post-implementation performance under the final configuration. Public Works staff will continue to monitor operations and coordinate with the contractor on construction staging and traffic control adjustments as necessary.

Additional Project Improvements

The Project utilized rubberized asphalt, a material that incorporates recycled tires. Pre-paving noise levels were measured at 83 decibels, while post-paving levels measured 58 decibels. The Project also enhanced visibility of roadway markings, crosswalks, and signage. New Intelligent Transportation Systems were installed at traffic signals, allowing staff to monitor traffic conditions and adjust signal timing remotely.

Public Works staff have implemented modifications requested by businesses, residents, the City Council, and the public that align with the Project's goals. These modifications include adjustments to parking restrictions, changes to permitted driving movements, and signal timing adjustments.

Economic and Financial Trend Analysis of Old Town Businesses

In addition to traffic and parking data, staff conducted a sales tax analysis to assess economic and financial performance in Old Town. This analysis covers the third quarter (July through September) of 2023, 2024, and 2025, allowing for a year-over-year comparison of the same three-month period before and after Project implementation. The analysis focuses on the Old Town "Triangle" area by reviewing local sales tax data and considering broader economic factors that influence consumer spending. Sales tax reflects activity from businesses that sell taxable goods and services, such as retail, restaurants, and select service providers. While it is a valuable indicator of spending patterns and business activity, it does not capture the full scope of Old Town's economy, as many essential services (such as healthcare, professional services, and most financial transactions) are not subject to sales tax. Sales tax data is preliminary and may change pending future audits. Figures and tables in this section present "unadjusted" sales tax receipts, meaning raw quarterly totals that have not been corrected for one-time payments, late filings, or other timing anomalies that can distort year-over-year comparisons.

Sales tax results can be affected by a wide range of external economic factors, including but not limited to:

- **Macroeconomic Conditions** – Such as inflation, interest rates, and consumer confidence, can impact spending patterns, particularly for discretionary purchases.
- **Industry-Specific Trends** – Fluctuations in gas prices, auto financing costs, remote work adoption, and tourism activity can directly impact business performance.

- Shifts in Consumer Behavior – Increased e-commerce adoptions, food delivery services (e.g., DoorDash, Uber Eats), and price sensitivity continue to change where and how people shop and dine.
- One-Time or Seasonal Impacts – Late or missed tax payments, business openings/closures, extreme weather events, and construction staging can cause temporary sales fluctuations.
- Local Workforce Dynamics – The rise of remote and hybrid work among major Old Town employers may reduce daytime foot traffic, gas station visits, and purchases at nearby businesses.

Because multiple factors influence sales tax revenue, this analysis does not attempt to isolate the specific impact of any single local infrastructure project. Instead, it provides a broad view of economic trends in Old Town compared to citywide, county, and statewide patterns.

To comply with confidentiality requirements, results are reported by major industry groups rather than by individual businesses. Performance can vary within each industry group, meaning not all businesses experience changes consistent with the broader group trends.

Old Town Goleta is the City's historic, cultural, and economic center, situated along Hollister Avenue between Fairview Avenue and State Route 217. It is a focal point for local businesses, residential communities, and redevelopment efforts. Originally a center for agriculture and light industry, the area has evolved into a mixed-use district with a strong emphasis on small businesses, hospitality, and service industries. On average, Old Town generates 23% of the City's total sales tax revenue. Within Old Town, the autos and transportation sector alone typically accounts for half of the sales tax generated there.

To assess performance, Figure 1 below summarizes the total unadjusted Old Town sales tax performance for Quarter 3, July to September (Q3) in 2023, 2024, and 2025, broken down by major industry group. Figure 2 shows two separate year-over-year percentage changes (Q3 2023 to Q3 2024, and Q3 2024 to Q3 2025) compared across five geographies: Old Town, Citywide, Citywide Core, Countywide, and Statewide. Citywide Core excludes Old Town, allowing a comparison between it and the rest of the city. Key observations are summarized below.

Figure 1. Old Town Sales Tax Performance Q3 (July- September) 2023-2025 (Unadjusted)

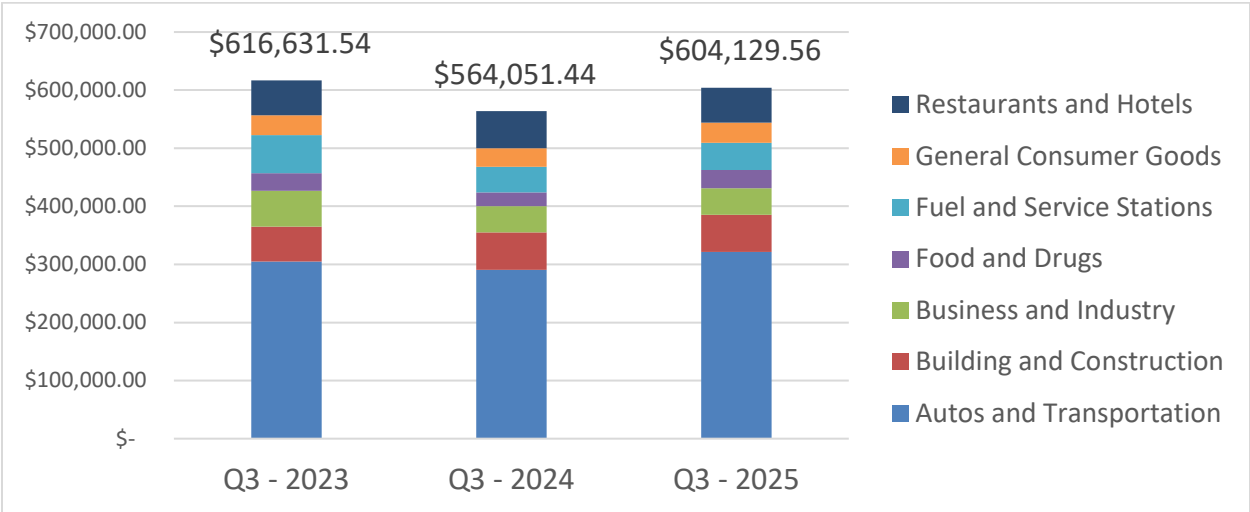
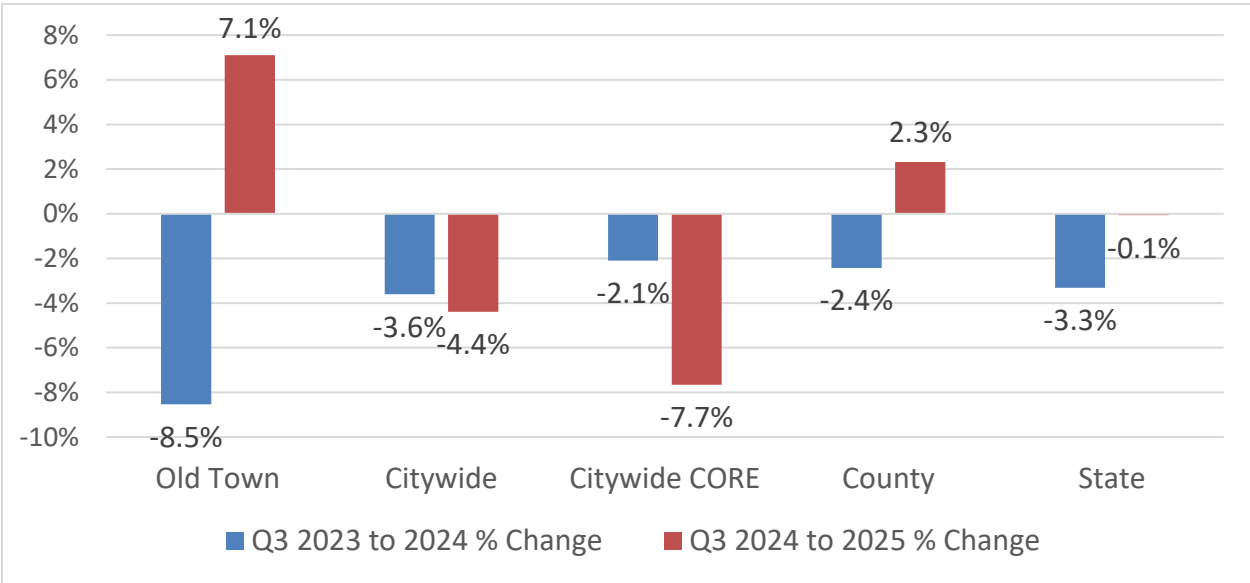


Figure 2. Q3 2023 to 2025 % Change (Unadjusted)



Summary of key observations for Q3 from 2023-2025 (July – September):

- Old Town’s overall Q3 sales tax revenue rose from \$564,051 in Q3 2024 to \$604,130 in Q3 2025, a 7.1% increase that nearly matched the 2023 level of \$616,632.
- Two industry groups that had declined in Q3 2024 rebounded notably in Q3 2025: Autos and Transportation (driven primarily by new motor vehicle dealers, which surpassed their 2023 performance) and Fuel and Service Stations (largely due to the reopening of a gas station after a temporary closure). Autos and Transportation alone account for roughly half of Old Town’s Q3 sales tax revenues, consistent with its long-term role as Old Town’s largest industry group.

- Food and Drugs sales tax revenue in Old Town rose approximately \$7,000 or nearly 30%, year-over-year, driven largely by cannabis-related businesses.
- Restaurants and Hotels declined approximately \$4,000 or 6% in Old Town in Q3 2025. Citywide, while overall slightly up, the decline was concentrated in fast-casual and quick-service restaurants. In Old Town, the decrease was concentrated in fast-casual dining. These trends likely reflect shifts in consumer behavior, including adjusted preferences, sensitivity to higher menu prices, and tip fatigue. Notably, Old Town casual dining was up in Q3 2024 before reversing in Q3 2025, suggesting a recent shift rather than a long-term trend.
- General Consumer Goods saw a decrease in Citywide CORE, largely attributed to missing payments in Q3-2025 from discount department and specialty stores, which are not located in Old Town, totaling approximately \$150,000, which accounts for the majority of the 7.7% decrease for Citywide CORE.
- Building and Construction was down statewide, with building material suppliers continuing a multi-quarter slump tied to reduced summer activity. Citywide followed the same downward trend, while Old Town and County figures were essentially flat.

This sales tax analysis underscores that multiple economic, behavioral, and industry-specific factors contributed to Old Town's performance. While certain industry-level trends mirrored regional and statewide patterns, Old Town's overall Q3 2025 sales tax performance outperformed citywide, countywide, and statewide results. For more detailed information—including the full Q3 data table, eight-year historical trends, and expanded industry-level breakdowns—see Attachment 2.

Next Steps

Analysis of data collected over the nearly 18 months since the Project was completed shows promising trends in traffic speed, collisions, and bike and pedestrian activity. However, it is still too early to draw definitive conclusions even without external factors, such as the construction of the City's largest infrastructure project in its history.

Public Works staff recommend continuing yearly data collection and analysis through the completion of Project Connect. This period (annual) is recommended to establish trends more confidently and evaluate the Project's effectiveness. Public Works is available to meet with any community member or group to discuss potential changes and address concerns while remaining true to the original Project goals.

FISCAL IMPACTS:

There is no fiscal impact associated with this item.

ALTERNATIVES:

No alternatives at this time.

LEGAL REVIEW BY: Isaac Rosen, City Attorney

APPROVED BY: Robert Nisbet, City Manager

ATTACHMENTS:

1. Staff Presentation
2. Additional Economic Information

ATTACHMENT 1

Staff Presentation

Hollister Avenue Old Town Interim Striping Project Update

May 5, 2026

City Council Meeting



Outline

- Background
- Improvements
- Public Outreach
- Project Approach
- Project Goals
- Evaluation of Results
- Old Town Business Environment
- Next Steps



Project Background

- 2018 - Complete Street Corridor Project
 - 18-months public outreach
 - Public surveys and meetings/workshops
 - Walking and Biking Tour
 - Developed street concepts
- January 2021 - Hollister Avenue Old Town Interim Striping Project Initiated
- Project Implemented July 2024



Public Outreach

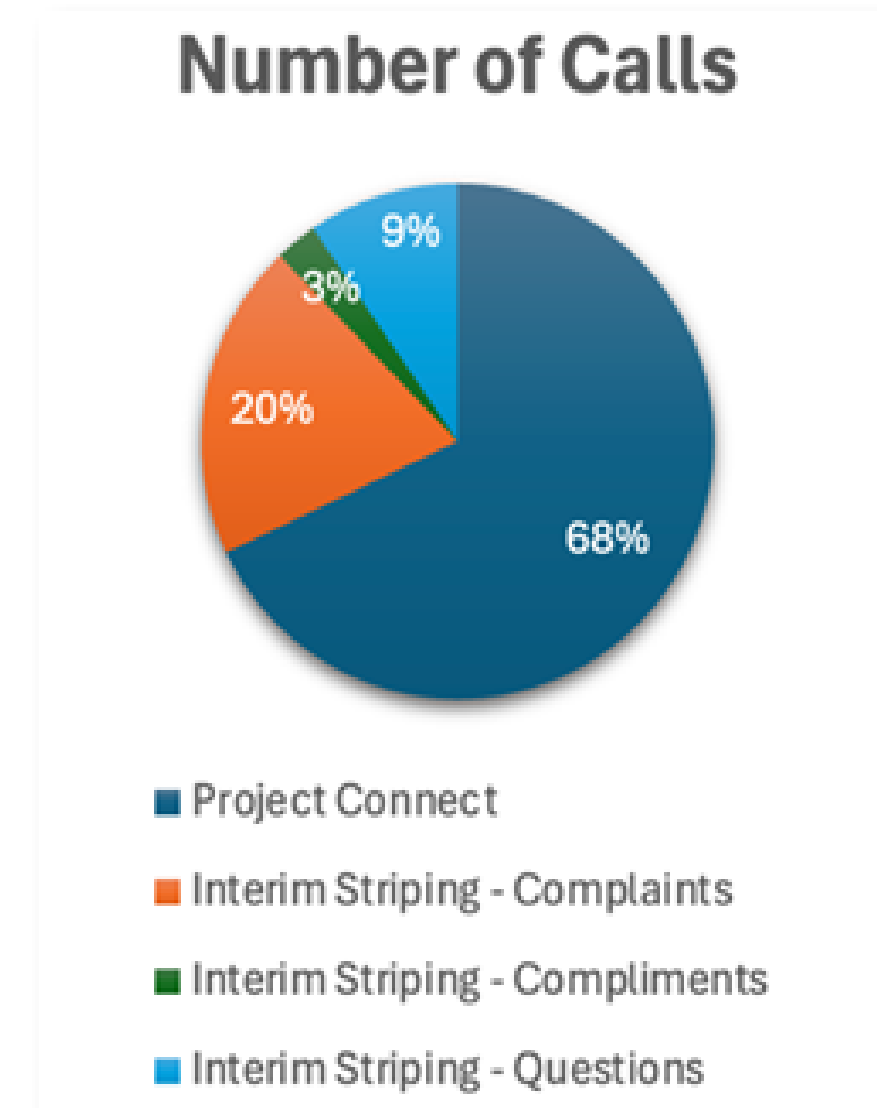
- 100+ in-person visits to Old Town businesses
- Over 2,000 postcard notifications were mailed
- *Monarch Press* articles
- Media Releases
- Personalized outreach to SBMTD, GUSD, Goleta Community Center, Santa Barbara South Coast Chamber of Commerce, Greater Santa Barbara Hispanic Chamber of Commerce
- Project Connect webpage updates
- Dedicated project phone number and email



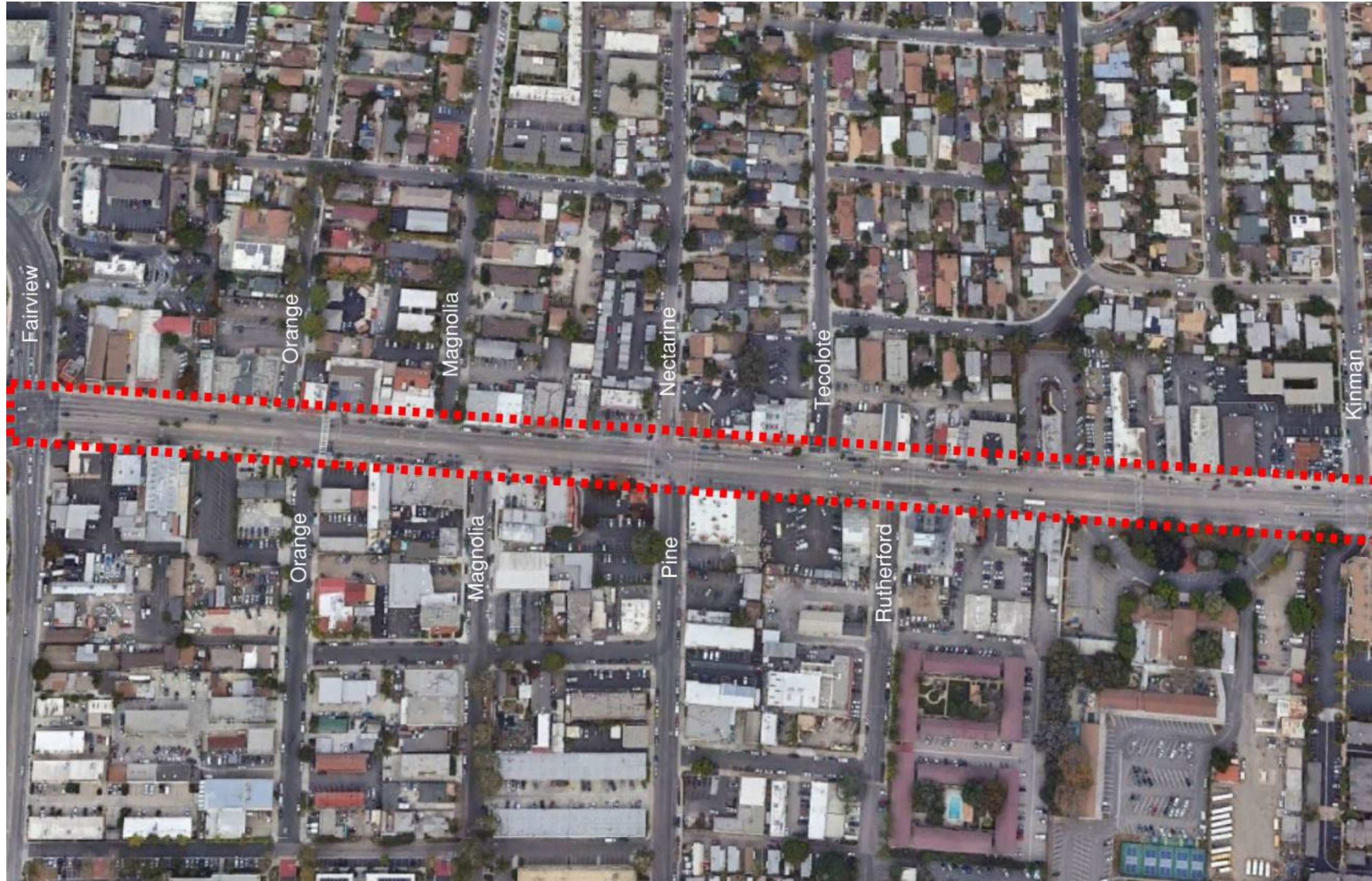
Public Outreach (cont.)

➤ Public Outreach Information Line

- 121 inquiries between May and November 2024.
 - Approximately 75 complaints, 10 compliments, others were general inquiries.
 - July was the peak inquiry month, averaging 19 inquiries per week.
 - Only 7 inquiries were received between November 2024 – February 2025.
- 10 inquiries between March 2025 – March 2026



Project Area

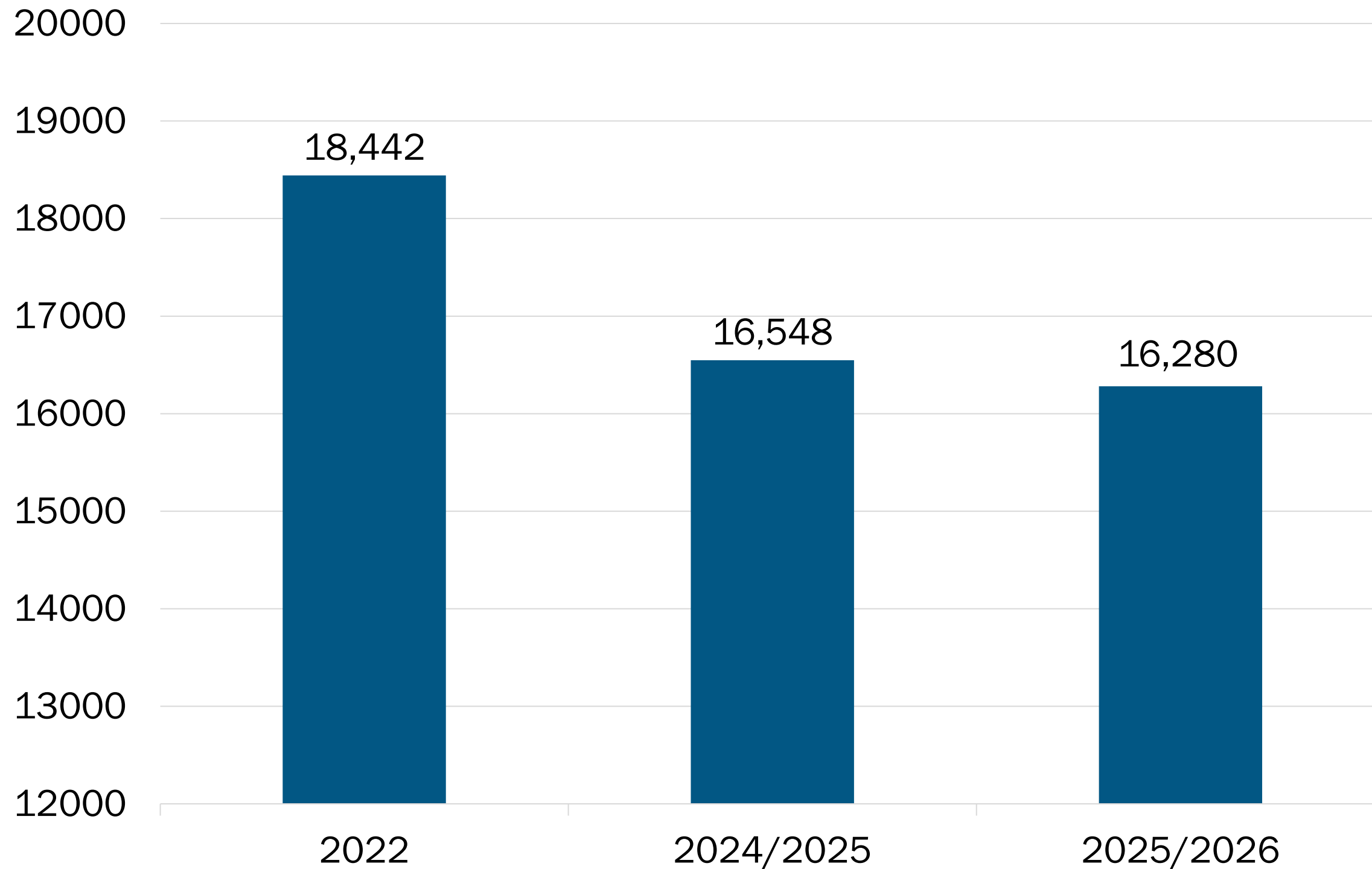


Project Goals

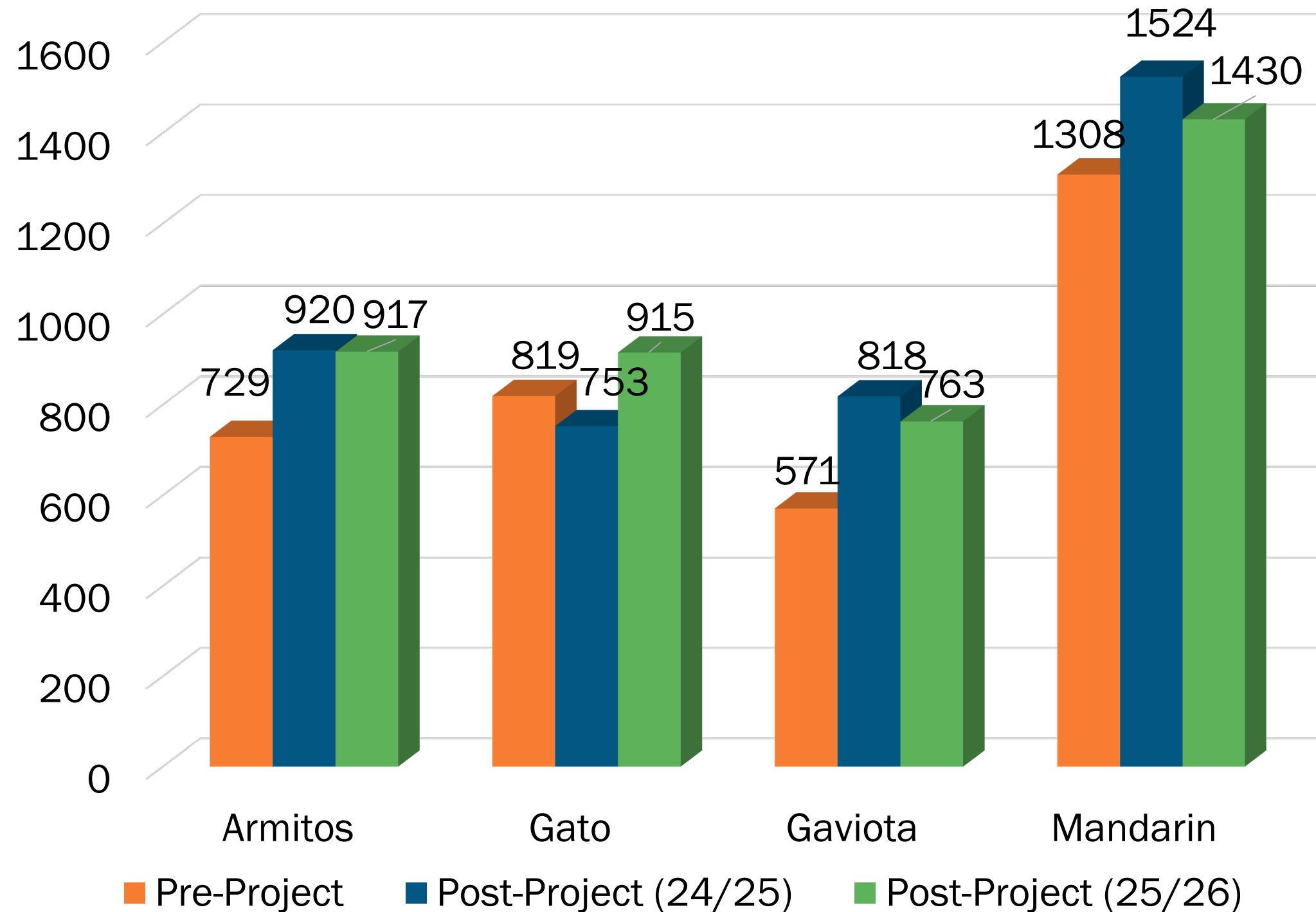
- Increase Parking Spaces and Availability
- Reduce Traffic Speeds
- Reduce Collisions
- Improve Conditions for Bikes and Pedestrians
- Maintain Traffic Flow



Daily Traffic Volume Comparison Hollister Avenue (Average Volumes)



Daily Traffic Volume Comparison Old Town Neighborhood Streets

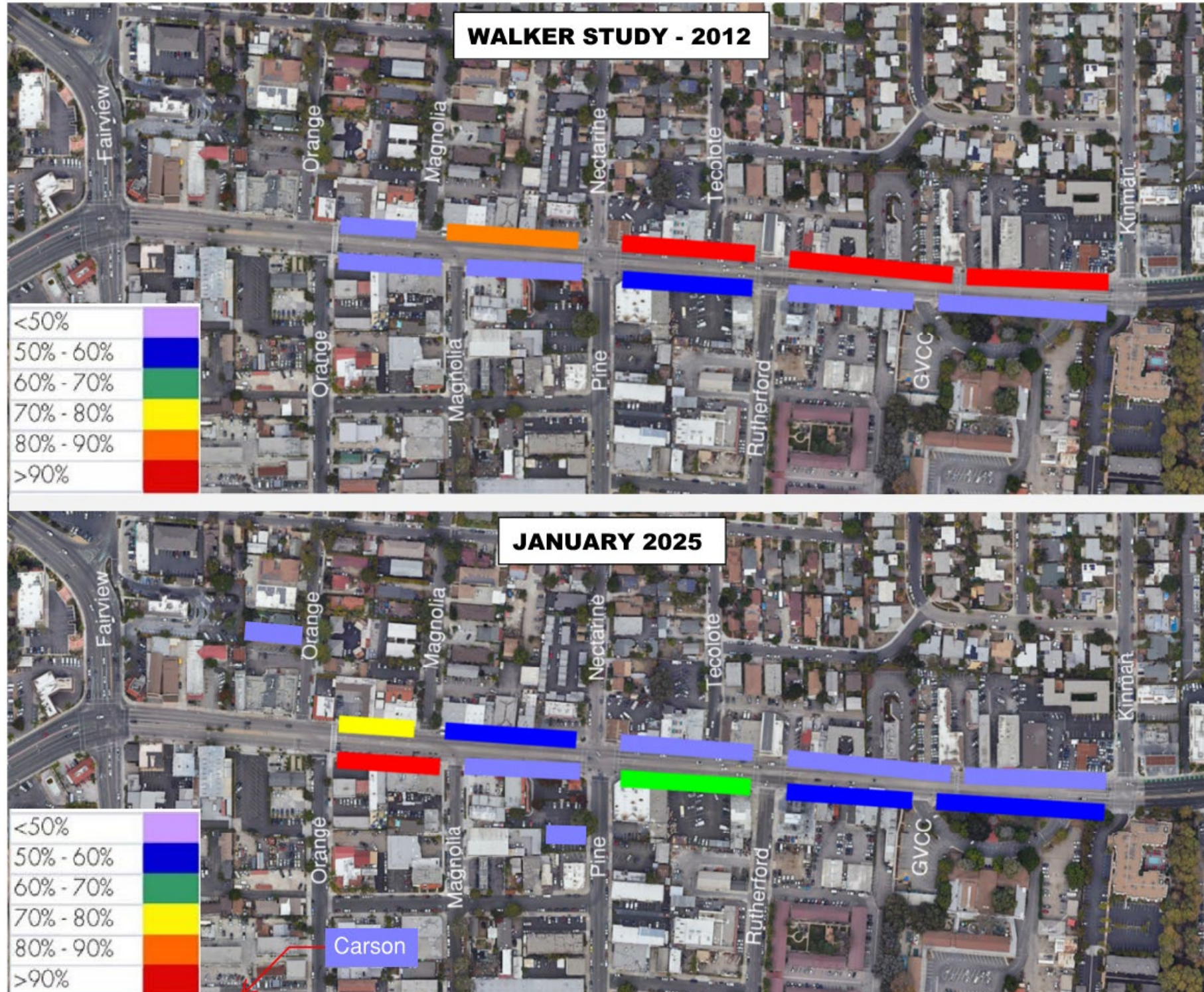


On-Street Parking Comparison Parking Spaces



On-Street Parking Comparison

Parking Occupancy



Changes since 2012

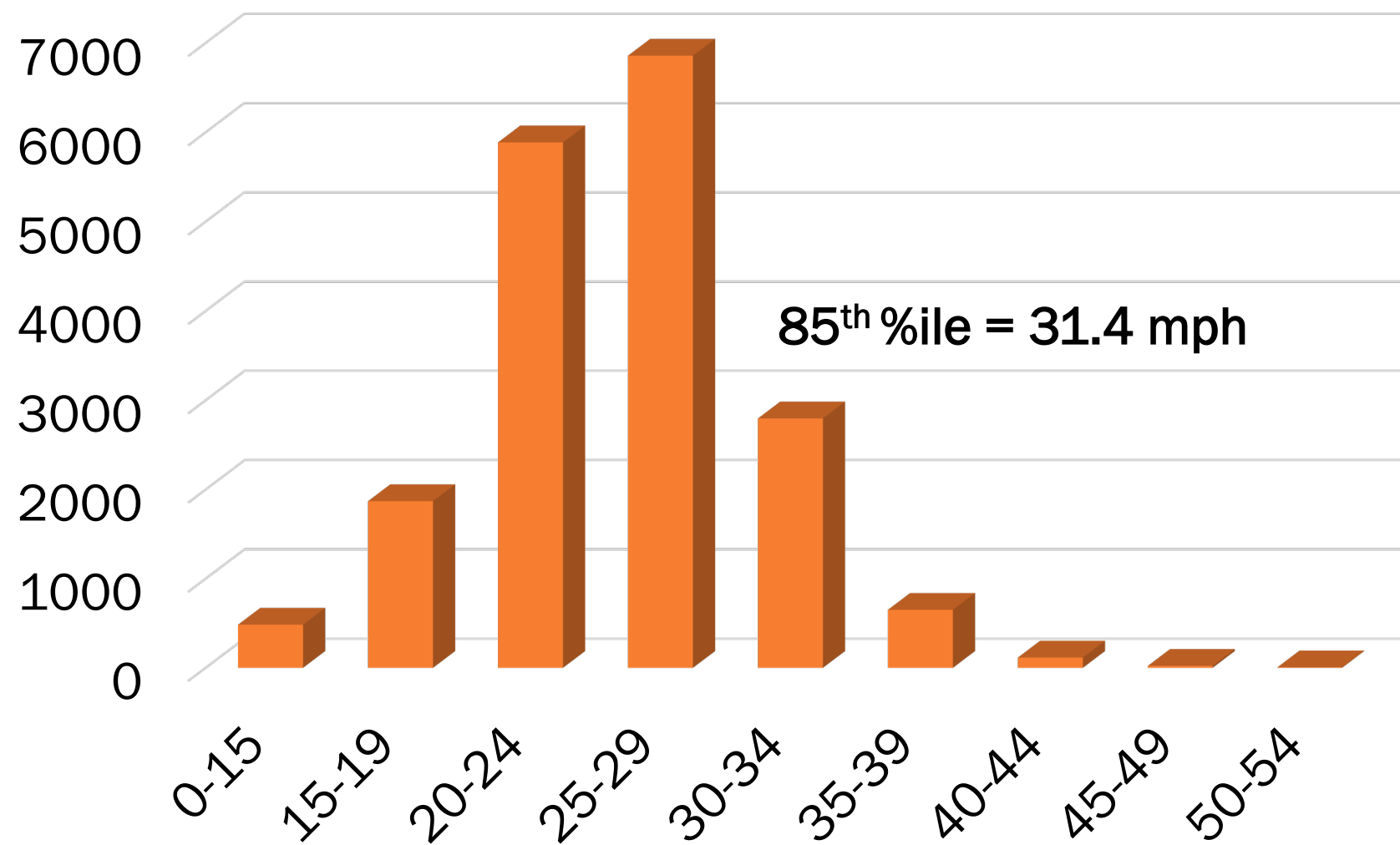
- 90 min parking
- 3 Public Lots: +70 spaces
- +19 spaces on Hollister
- New businesses
- Wayfinding signage

On-Street Parking Comparison Parking Occupancy – 2026 Parking

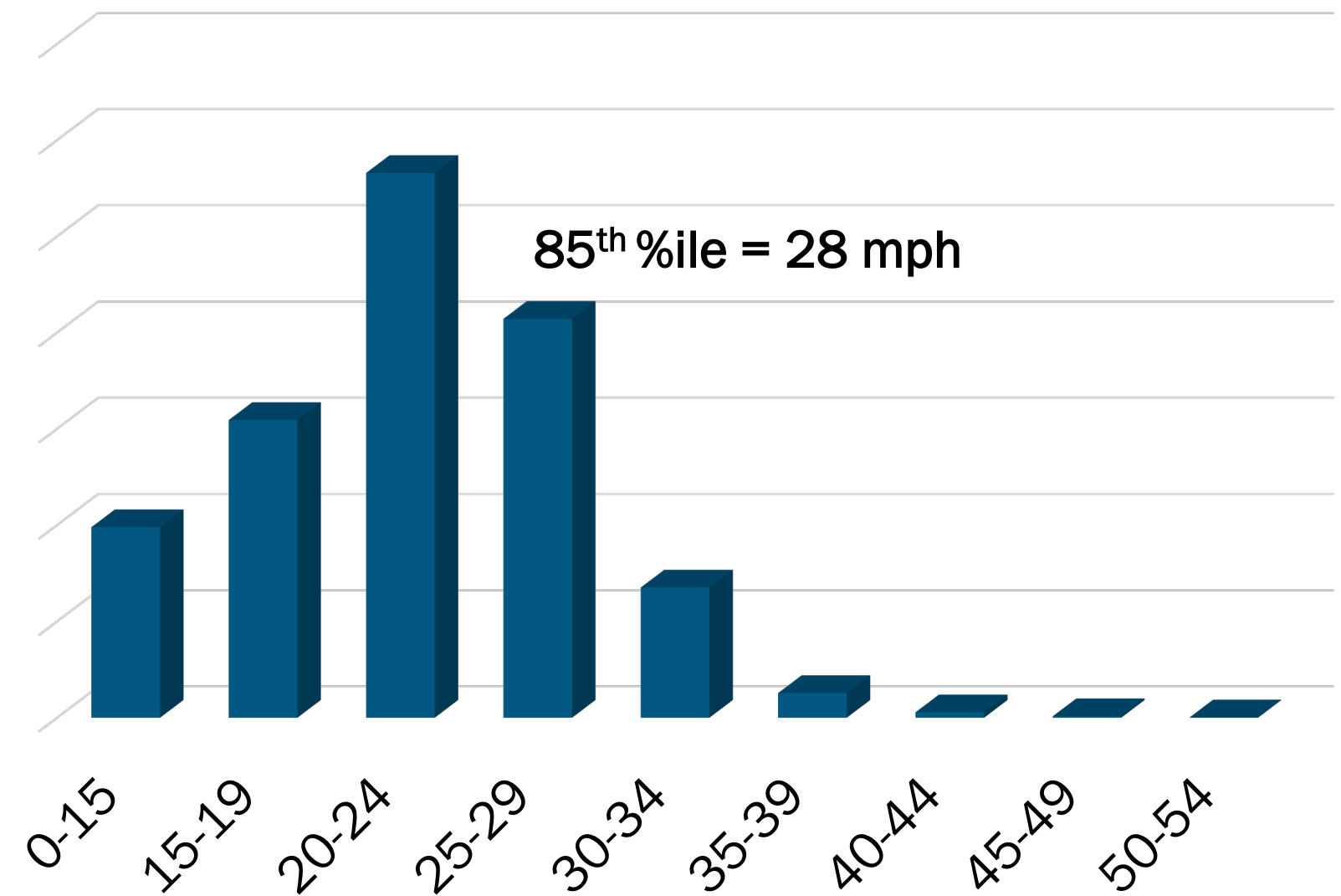


Traffic Speeds Hollister Avenue

2022
Speed Profile

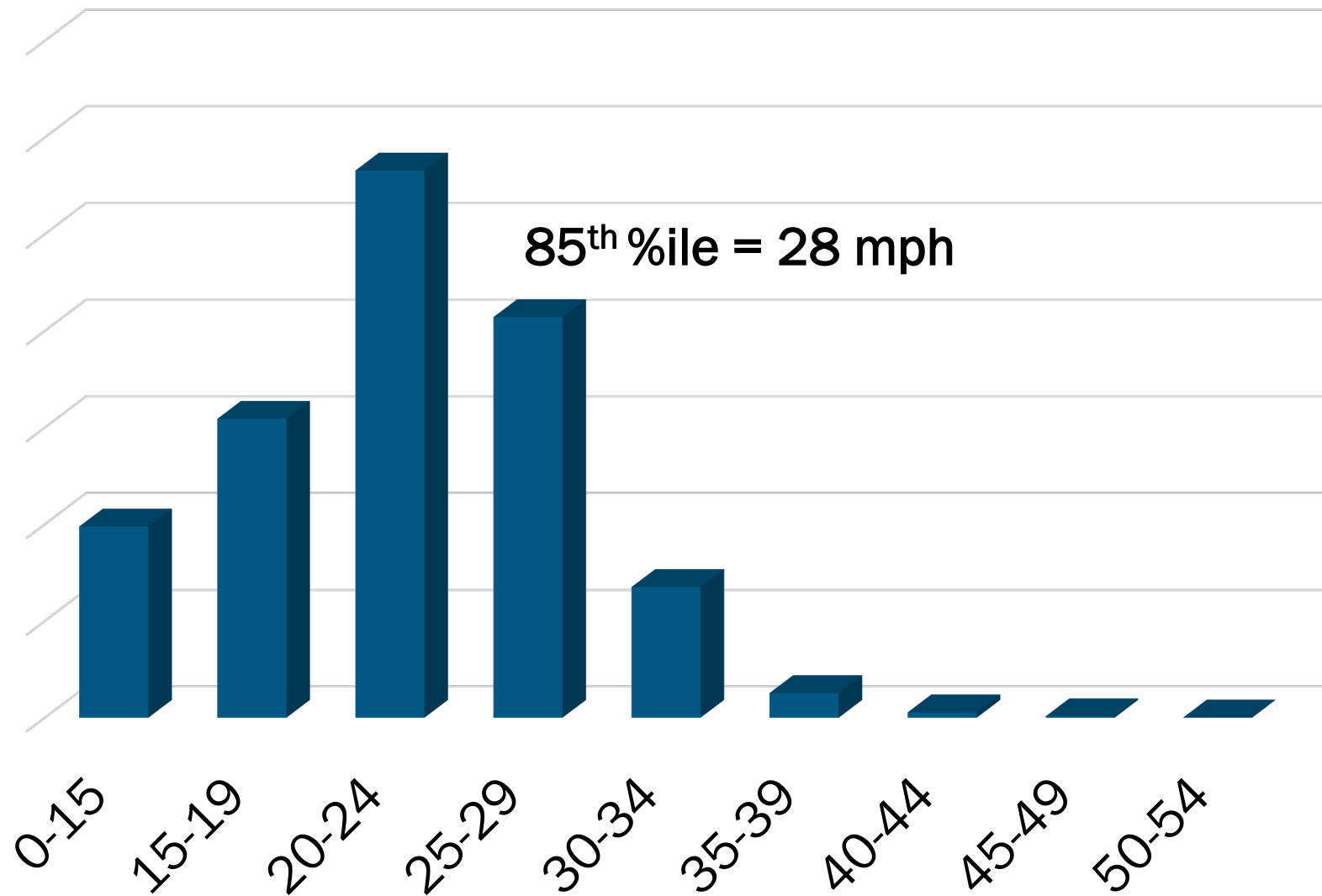


2024-25
Speed Profile

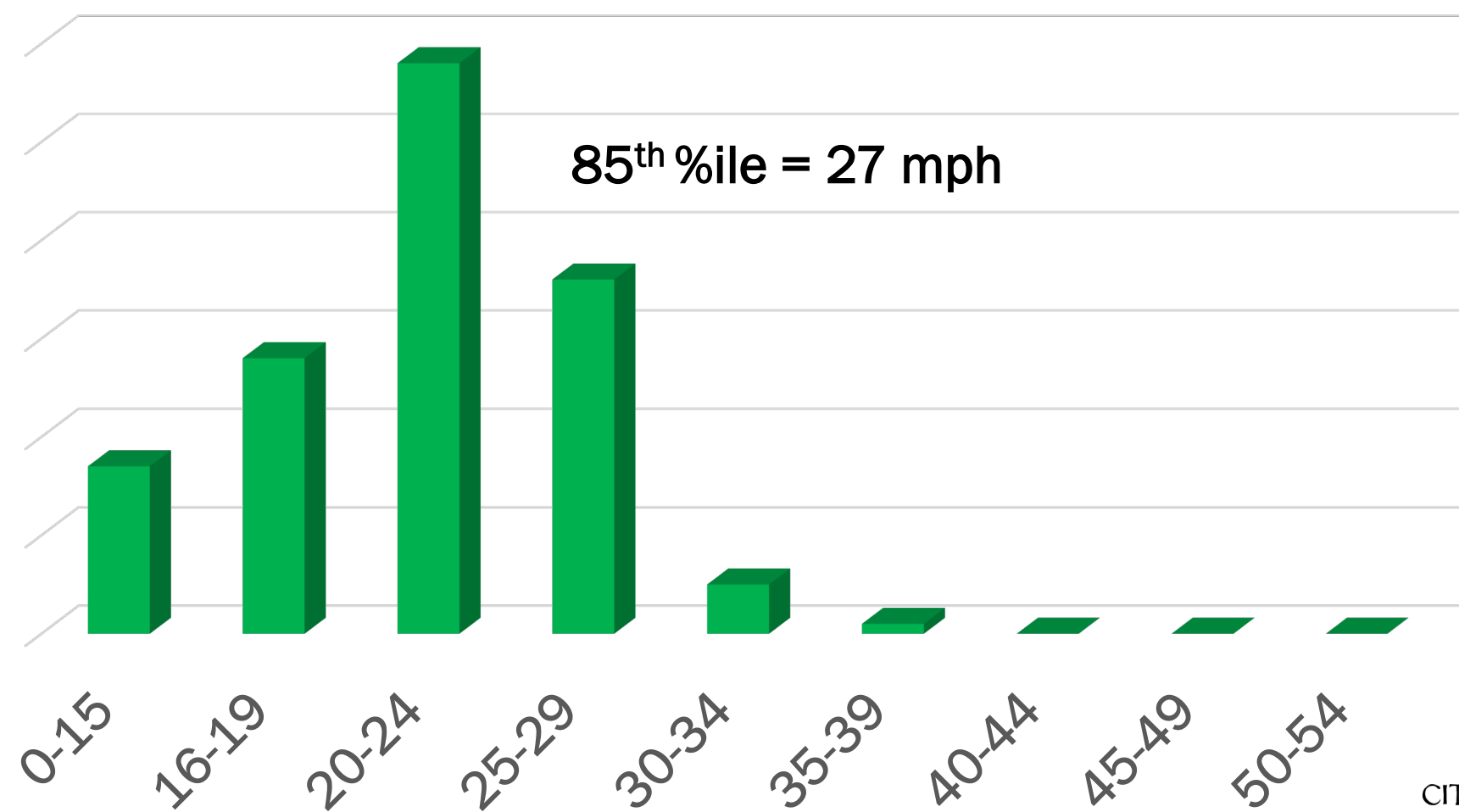


Traffic Speeds Hollister Avenue

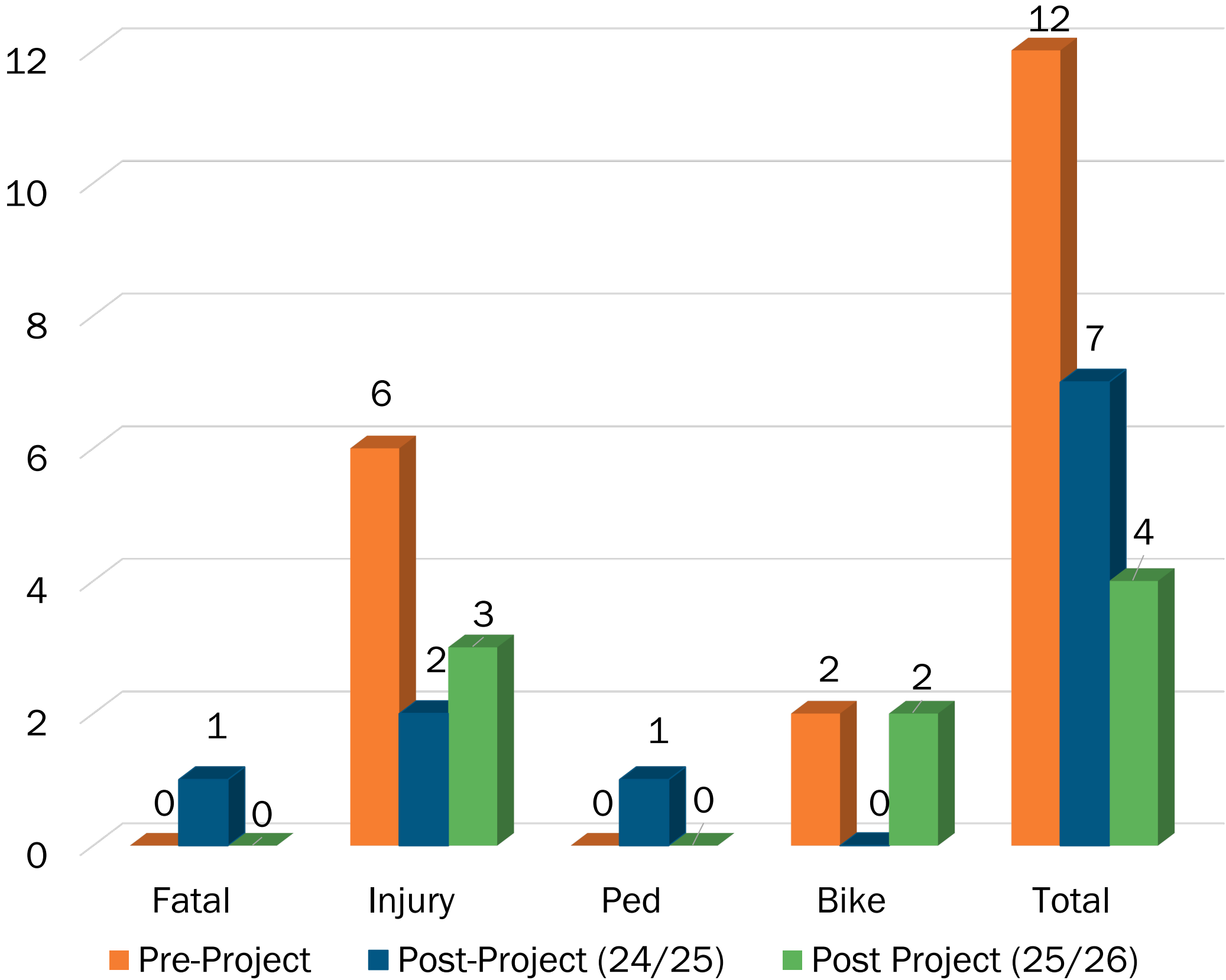
2024-25
Speed Profile



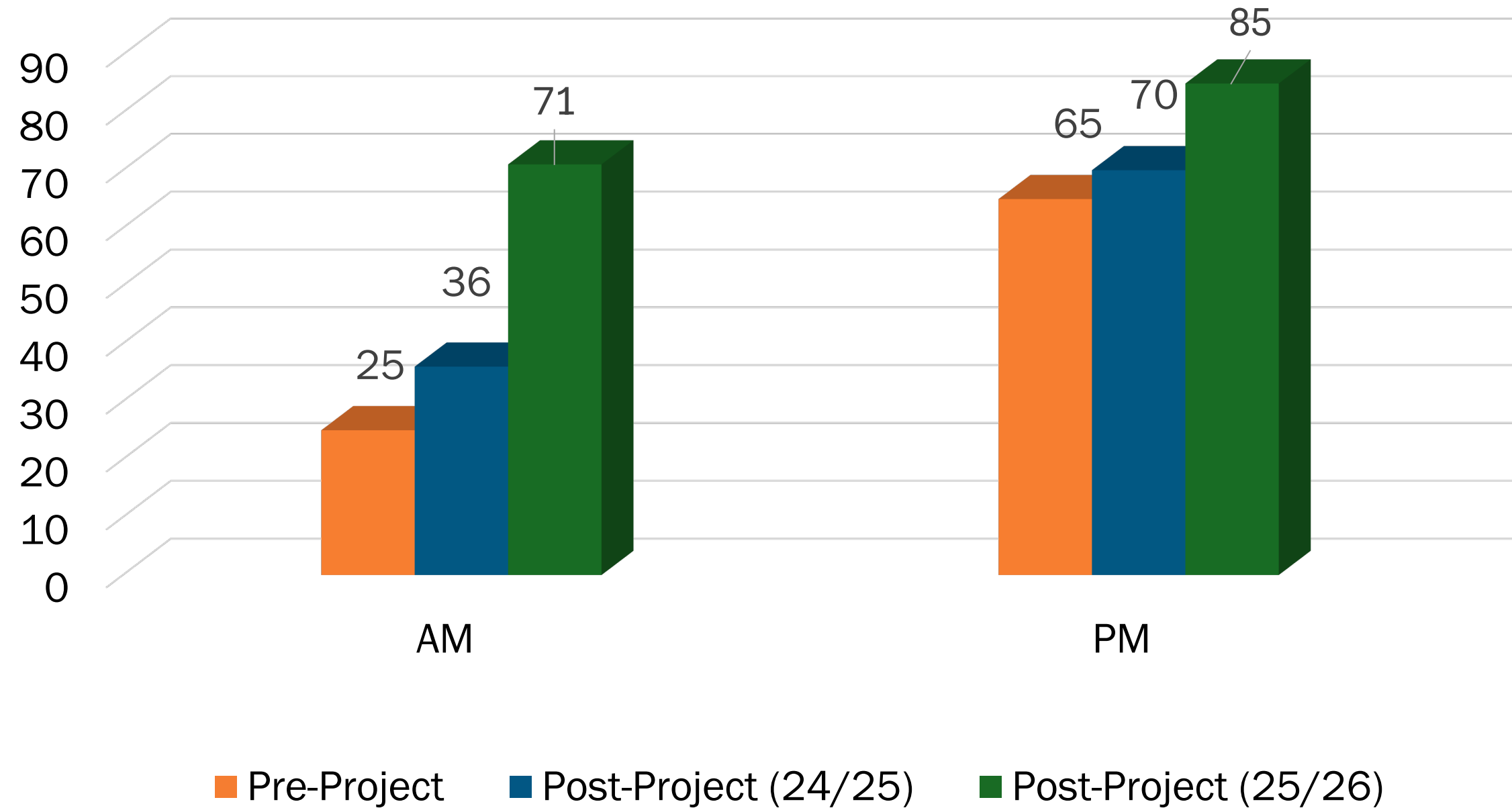
2026
Speed Profile



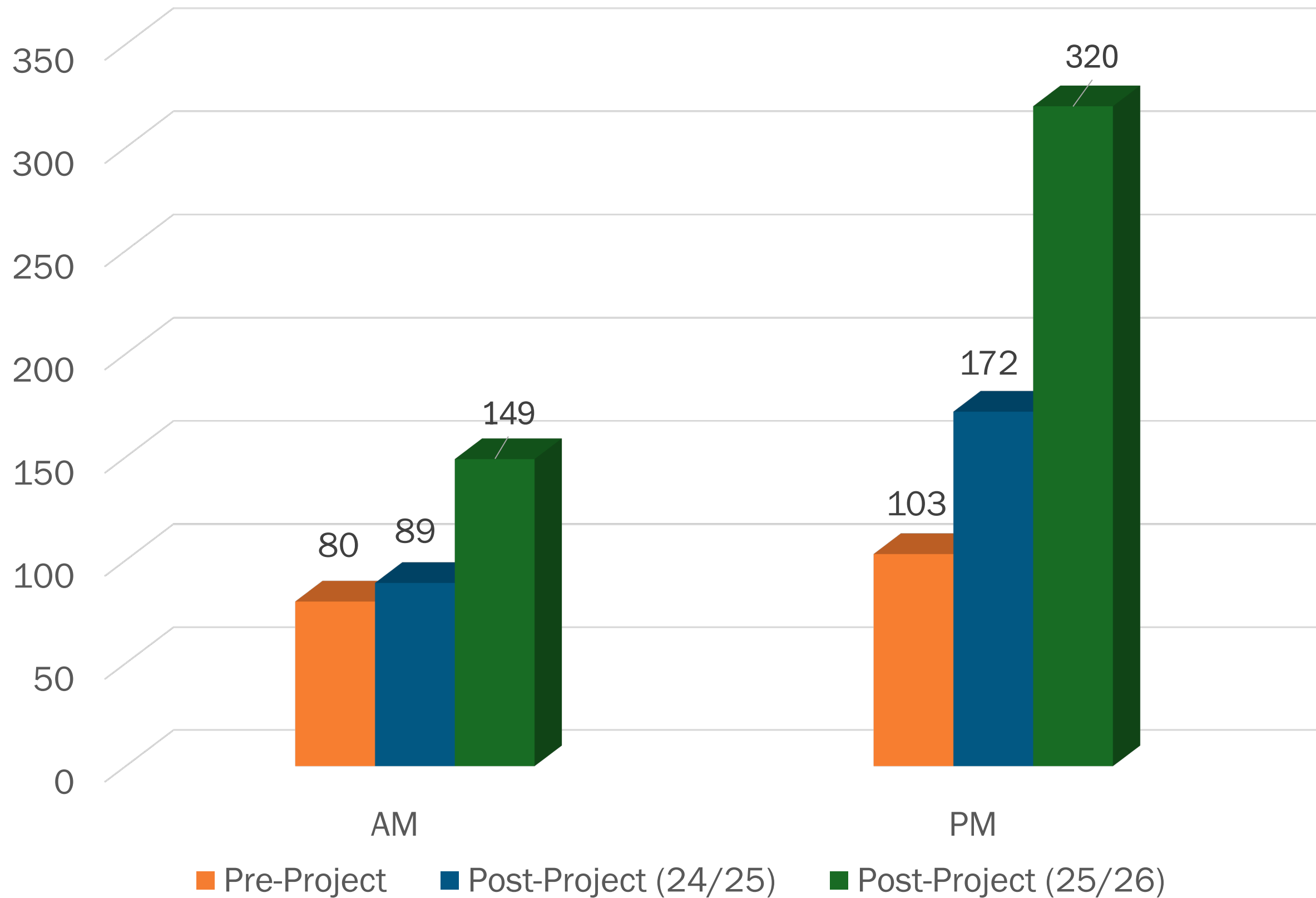
Collision Comparison



Bicycle Volume Comparison



Pedestrian Volume Comparison



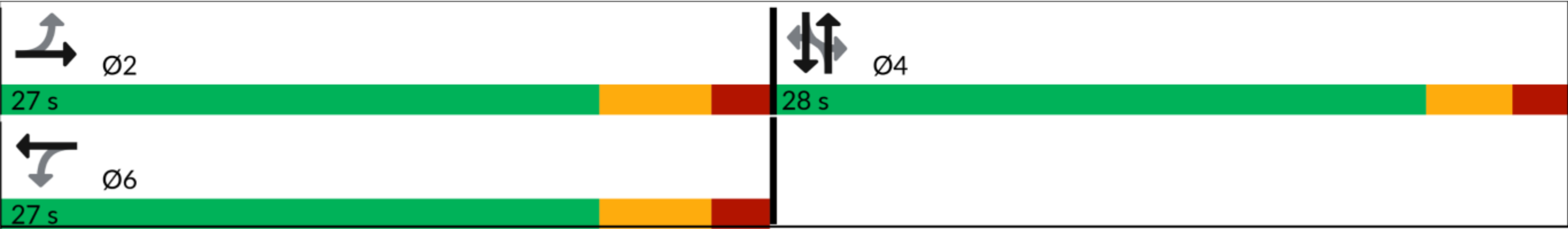
Hollister Avenue / Pine-Nectarine LOS

Intersection Signal Delay (s/veh): 13.6
 Intersection Capacity Utilization 61.9%
 Analysis Period (min) 15

Intersection LOS: B
 ICU Level of Service B

2022

Splits and Phases: 4: Pine Avenue/Nectarine Avenue & Hollister Avenue

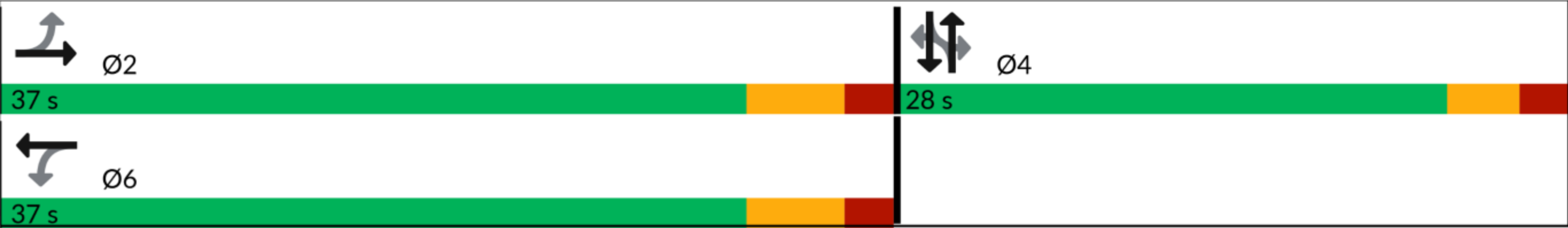


Intersection Signal Delay (s/veh): 22.5
 Intersection Capacity Utilization 65.6%
 Analysis Period (min) 15

Intersection LOS: C
 ICU Level of Service C

2024/25

Splits and Phases: 4: Pine Avenue/Nectarine Avenue & Hollister Avenue



Hollister Avenue / Pine-Nectarine LOS – cont.

Intersection Signal Delay (s/veh): 13.9

HCM 7th LOS

B

Intersection LOS: B

ICU Level of Service B

Analysis Period (min) 15

Splits and Phases: 4: Pine Avenue/Nectarine Avenue & Hollister Avenue

2025/26



Project Goal Compliance



Increase Parking Spaces and Availability



Reduce Traffic Speeds



Reduce Collisions



Improve Conditions for Bikes and Pedestrians

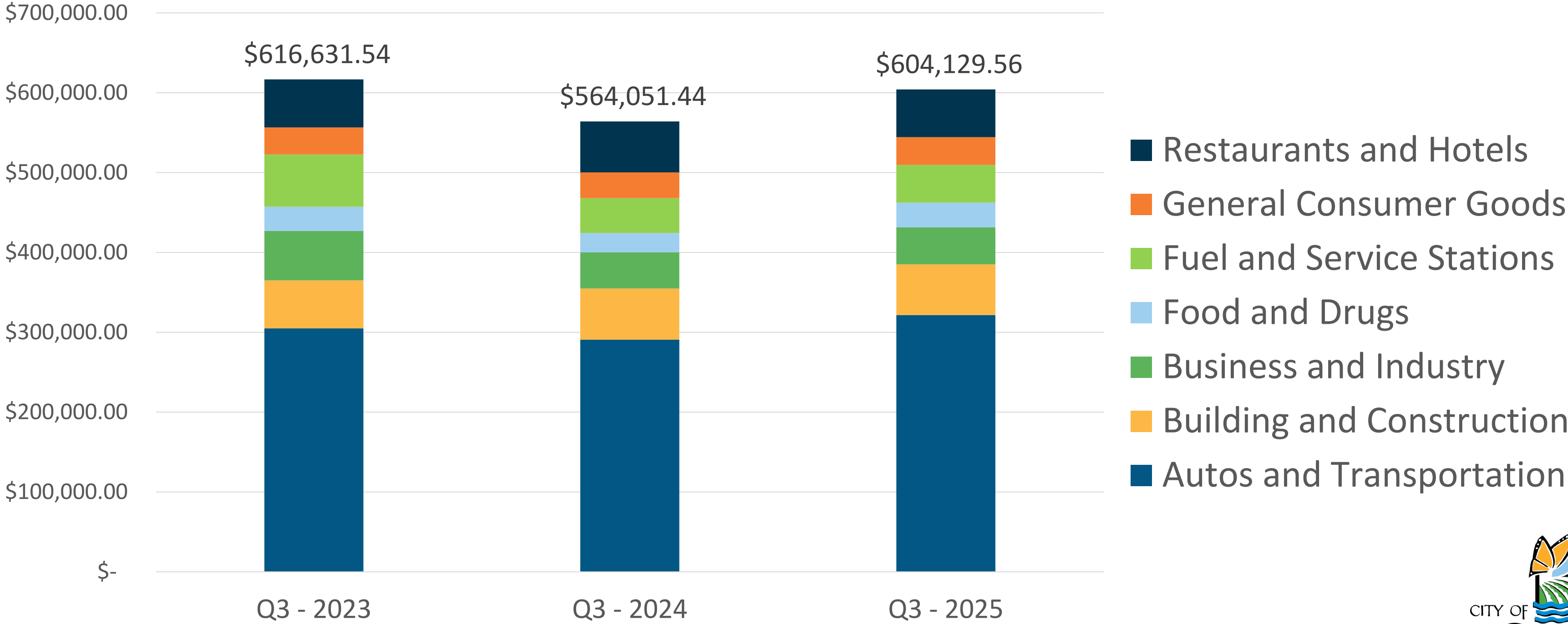


Maintain Traffic Flow



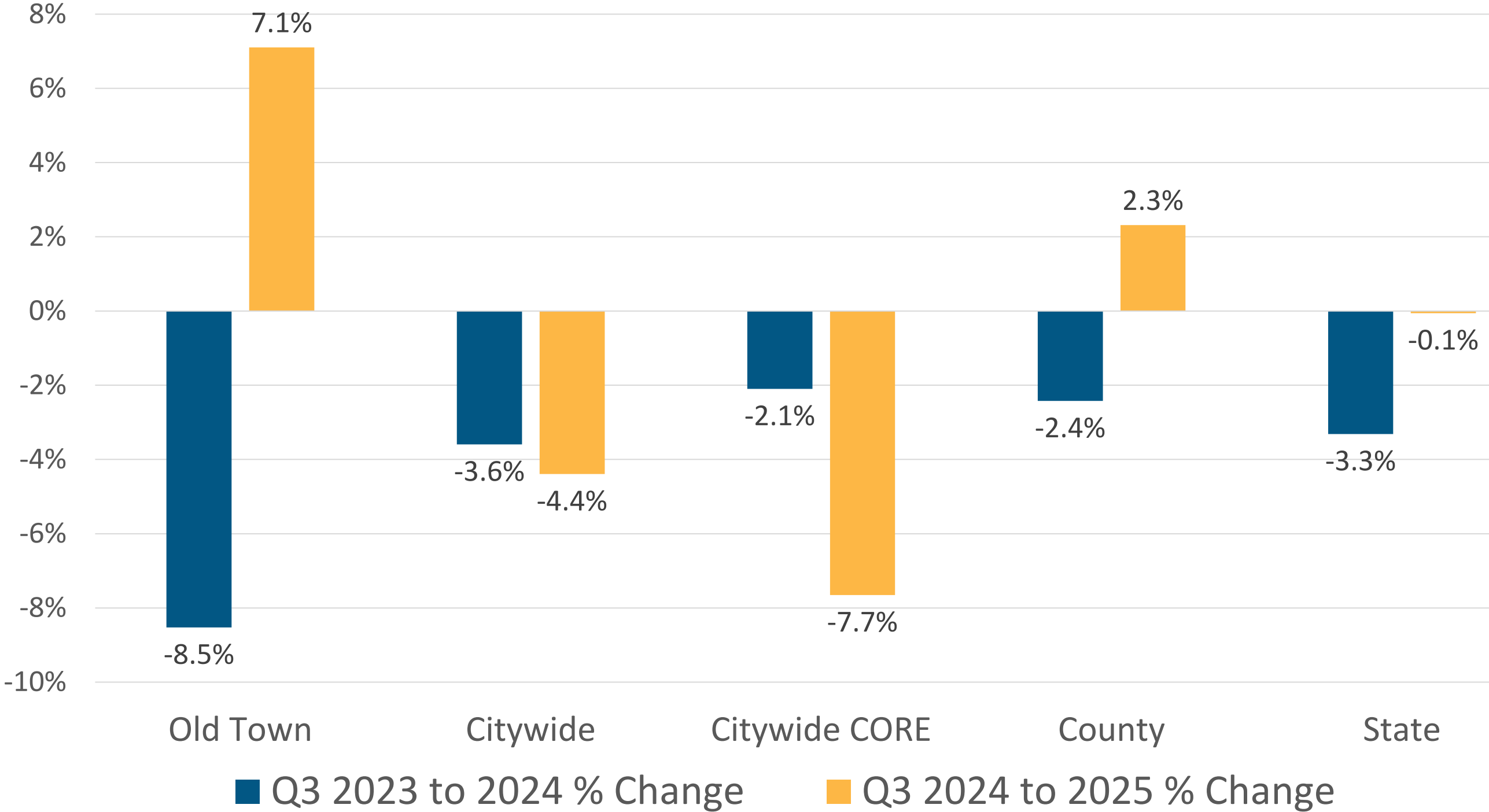
Key Economic Observations

Old Town Sales Tax Performance Q3 (July- September) 2023-2025 **UNADJUSTED**



Key Economic Observations

Q3 2023 to 2025 % Change **UNADJUSTED**



- In 2025 Old Town sales tax performance increased from Q3 2024 and nearly returned to 2023 levels
- Citywide and Core decline is mainly due to missing payments from discount and specialty stores (approx. ~\$150K)
 - *When adjusted the % differences increase to 1% (Citywide) and 0.1% (Core)*



Next Steps

- Monitor traffic conditions after construction.
- Meet with concerned citizens.
- Consider modifications to address concerns in alignment with project goals.
- Report back to City Council as requested.

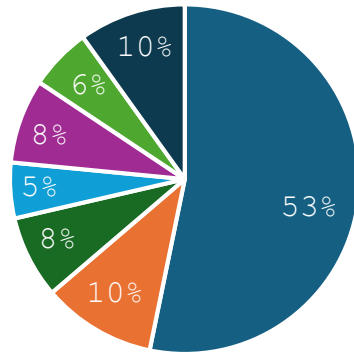
Questions/Comments

ATTACHMENT 2

Additional Economic Information

Old Town - Revenue Generators by Major Industry Groups

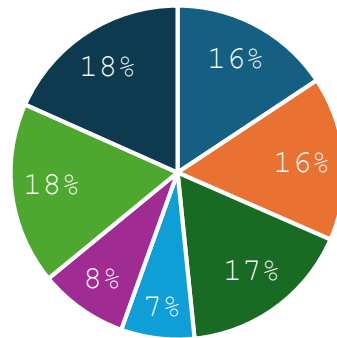
(Q3 - 2025)



- Autos and Transportation
- Building and Construction
- Business and Industry
- Food and Drugs
- Fuel and Service Stations
- General Consumer Goods

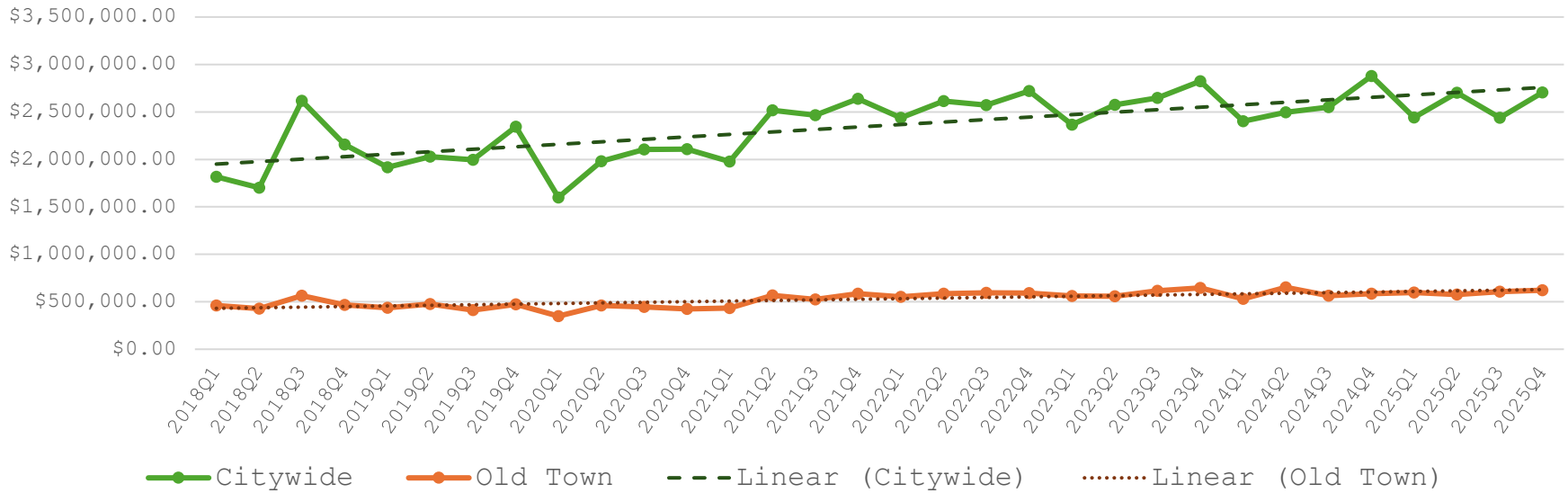
Citywide - Revenue Generators by Major Industry Groups

(Q3 - 2025)



- Autos and Transportation
- Building and Construction
- Business and Industry
- Food and Drugs
- Fuel and Service Stations

Historical Trend of Total Sales Tax Performance 2018-2025
(Unadjusted)



	Q3 Change 2023 to 2024 UNADJUSTED July - September										
Industry Group	Old Town		Citywide		Citywide Core		Countywide		Statewide		Key Observations
Autos and Transportation	-\$13,891.82	-5%	-\$5,734.26	-2%	\$8,157.56	25%	\$34,919.00	1%	-\$18,617,529.00	-5%	Old Town down, Citywide down. Auto Dealerships are down, which accounts for majority of this Industry Group. New autos were down statewide, higher pricing and financing costs. There are no auto dealers in Citywide Core which accounts for the increase.

												When looking at adjusted for economic data, autos and transportation for the supply stores were up and the repair shops were trending down.
Building and Construction	\$3,714.49	6%	-\$10,502.06	-3%	-\$14,216.55	-4%	\$5,116.00	0%	-\$5,119,711.00	-3%		Old Town up, Citywide down. The increase in Old town can be attributed to onetime payments related to contractor building materials, overall +\$3k
Business and Industry	-\$16,453.68	-27%	-\$71,327.39	-15%	-\$54,873.71	-14%	-\$93,025.00	-3%	\$45,100,517.00	11%		Old Town down, Citywide down. The decrease in Old Town in largely attributed to missing payments in Q3-2024 and a large one-time payment received only in Q3-2023 around \$12k
Food and Drugs	-\$6,340.70	-21%	-\$22,579.53	-13%	-\$16,238.83	-12%	-\$163,560.00	-11%	-\$12,553,065.00	-12%		Old Town down, Citywide down. The decrease due to missed payment in Q2 that was applied to Q3. When analyzed for adjusted for economic data, food and drugs were both up in Old Town at 7% and Citywide at 3%
Fuel and Service Stations	-\$21,717.94	-33%	-\$34,209.97	-14%	-\$12,492.03	-7%	-\$140,704.00	-6%	-\$36,757,264.00	-17%		Old Town down, Citywide down. Gas station performance was down in Old town and Citywide, primarily, due to a gas station being temporarily closed. Gas prices also influence performance.
General Consumer Goods	-\$1,712.31	-5%	\$15,127.01	2%	\$16,839.32	3%	-\$311,883.00	-8%	-\$35,776,984.00	-10%		Old Town down, Citywide slightly up. Old Town primarily consists of specialty stores, furniture, sporting goods, and jewelry stores that were all down.

Restaurants and Hotels	\$3,821.86	6%	\$34,101.32	8%	\$30,279.46	9%	\$159,611.00	4%	-\$1,287,111.00	0%	Old Town up, Citywide Up. For Old Town, casual dining restaurants were up, most likely due to preference, consumer behavior, and having more options to choose from with new businesses opening up.
Total	-\$52,580.10	-9%	-\$95,124.88	-4%	-\$42,544.78	-2%	-\$509,526.00	-2%	-\$65,011,147.00	-3%	

Q3 Change 2024 to 2025 UNADJUSTED July - September											
Industry Group	Old Town		Citywide		Citywide Core		Countywide		Statewide		Key Observations
Autos and Transportation	\$30,678.52	11%	\$50,828.71	15%	\$20,150.20	49%	-\$257,598.00	-7%	-\$16,514,019.00	-5%	Old Town up, Citywide up. New Auto Dealerships were up compared to both Q3 of 2023 and 2024, which accounts for the vast majority of this Industry Group. Used autos were down statewide, higher pricing and financing costs. There are no auto dealers in Citywide Core which accounts for the increase.
Building and Construction	-\$374.37	-1%	-\$9,691.84	-2%	-\$9,317.47	-3%	-\$6,192.00	0%	-\$3,583,564.00	-2%	Old Town slightly down, Citywide down. Statewide building material suppliers struggled during the summer, similar pattern from the last several quarters.
Business and Industry	\$869.93	2%	\$16,937.91	4%	\$16,067.98	5%	\$202,245.00	7%	-\$36,339,034.00	-8%	Old Town up, Citywide up. Business services saw an increase citywide, but equipment for farm and construction saw a decrease citywide.

Food and Drugs	\$7,018.14	29%	\$28,270.43	20%	\$21,252.29	18%	\$207,357.00	15%	\$8,584,263.00	9%	Old Town up, Citywide up. Increase is largely attributed to cannabis related businesses in Old Town
Fuel and Service Stations	\$3,471.53	8%	\$244.66	0%	-\$3,226.87	-2%	\$93,290.00	4%	\$11,017,590.00	6%	Old Town up, Citywide up. Gas station performance was up in Old Town primarily, due to a gas station reopening after a temporary closure. Citywide a decline in revenue from fuel-service stations—marking the 10th out of the last 11 quarters with negative year-over-year change. This trend is largely tied to West Texas Intermediate (WTI) crude oil prices, which hit their lowest monthly levels since 2021.
General Consumer Goods	\$2,414.18	7%	-\$201,666.30	-32%	-\$204,080.48	-34%	\$99,292.00	3%	\$24,216,321.00	7%	Old Town up, Citywide down. Specialty stores were up in Old Town, despite several missed payments in this industry group. The decrease in Citywide and Core is largely attributed to missing payments in Q3-2025 from discount department and specialty stores which are not located in Old Town totaling ~150K.
Restaurants and Hotels	-\$3,999.81	-6%	\$3,031.59	1%	\$7,031.40	2%	\$137,141.00	3%	\$11,534,682.00	4%	Old Town down and Citywide up. Fast Casual and quick services restaurants saw a decrease citywide. Old Town also showed a decrease in casual dining. Likely due to preference, consumer behavior balancing higher menu prices, tip fatigue, and tighter margins. Overall, summer performance appeared stable but

												lacked the tourism surge many had hoped for.
Total	\$40,078.12	7%	-\$112,044.84	-4%	-\$152,122.96	-8%	\$475,535.00	2%	-\$1,083,761.00	0.06%	-	