



Dentagraphics was first contacted in early September of 2018 by the Developer, Kimball Associates, Inc., to help confirm the Developer's beliefs regarding the need for medical and dental services within the City limits of Oakley. An Area Analysis was ordered and the only criteria dictated by the developer was that the analysis be for the practice of General Dentistry and that it cover Antioch, Brentwood and Oakley. No modifications to Dentagraphics's standard analysis criteria were requested nor made.

This study analyses the collected demographic data to predict the success of locating a dental practice in this portion of East Contra Costa County. The Developer believes that there are many parallels that apply to other health care services as well.

Following are excerpts from that analysis. The full analysis commissioned by Kimball Associates, Inc. is available for review by all health care professionals who are considering a move to the Oakley Professional Center. Kimball Associates, Inc. recommends that each practitioner will benefit by ordering their own Analysis from Dentagraphics, specific to their specialty, as part of their vetting process.

INTRODUCTION

THIS AREA ANALYSIS ANALYZES THE GREATER NORTHERN CALIFORNIA AREA WHICH INCLUDES ANTIOCH, OAKLEY AND BRENTWOOD, AMONG OTHER AREAS. WE HAVE BROKEN DOWN THE REGION INTO 8 CIRCLES, EACH WITH A TWO MILE RADIUS. THIS REPORT SHOWS THE DEMOGRAPHIC DATA FOR EACH CIRCLE AND RANKS THEIR DESIRABILITY IN ACCORDANCE WITH A PARTICULAR PRACTICE STRATEGY.

We use demographic data from numerous commercial sources, which we cross-reference for accuracy. We crowd source data about dentists in your Area (your competition), which we manually verify and refine. With the resulting maps, you can see the circles in your Area that have the most need for your practice strategy with the least competition.....



DEMOGRAPHIC DATA & CIRCLE RANKING

Below is a table of all of the demographic data that determined each circle's color coding. As you can see, the weight for each variable is reiterated under the column headers. The circles have been ranked by most to least desirable. This calculation was done by ranking the circles within each demographic category. Then each of these ranks was multiplied by their associated weight and summed up into a final score. The top five circles are highlighted in blue. We will next examine each of these five circles in further detail.

Ranking	Circle	Population	Dental Offices	Population/ Dental Office	Employees/ Dental Office	Population Density (Residents per Square Mile)	Median Household Income	Average Household Size	Median Age	Owner- Occupied Households	Population Growth (2010-2018)	Educational Attainment	Native English/ Spanish Speakers	Weighted Score
		Weight		90%	20%	60%	60%	15%	5%	20%	20%	25%	5%	
1	1	41,906	4	10,477	1,408	3,643	\$96,371	3.13	35.8	68.3%	9.83%	20.71%	89.0%	2.11
2	2	43,785	9	4,865	354	2,575	\$103,149	3.34	32.6	73.6%	10.48%	16.04%	91.4%	1.80
3	4	38,431	19	2,023	316	3,364	\$117,998	3.37	34.2	74.4%	9.60%	28.15%	87.0%	1.74
4	6	11,394	2	5,697	574	636	\$88,433	3.53	31.2	71.5%	13.34%	16.10%	92.4%	1.62
5	3	39,100	18	2,172	283	902	\$113,091	3.32	37	75.7%	9.73%	28.40%	81.6%	1.44
6	8	52,631	22	2,392	421	5,432	\$64,250	2.95	33.8	47.0%	9.76%	13.83%	92.6%	1.41
7	7	18,001	16	1,125	201	1,115	\$122,535	2.86	43.1	81.6%	10.92%	34.60%	89.2%	1.39
8	5	36,577	19	1,925	341	1,716	\$105,743	3.01	37.5	71.3%	11.35%	26.98%	94.2%	1.29

Selecting a Location

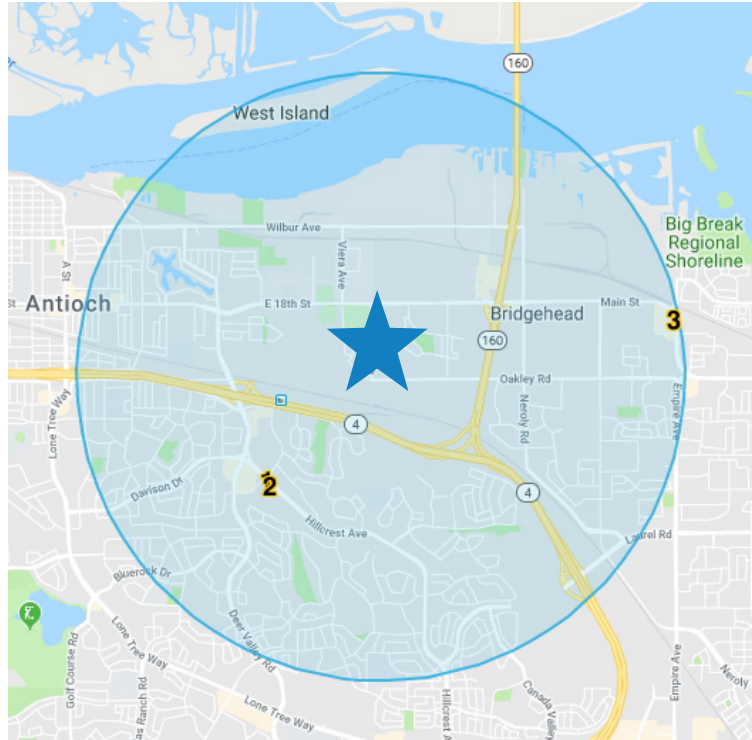
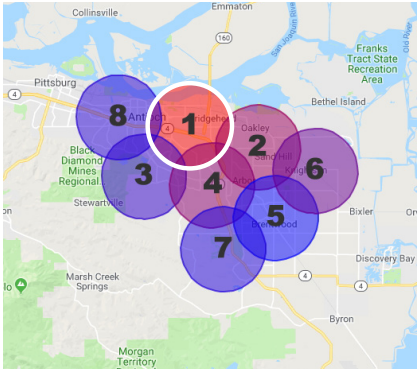
You should consider many other factors when selecting an office location. In particular, you should consult a real estate expert or practice consultant who is familiar with the area around your proposed site.... We determine how important each demographic variable is to your practice and then assign a weight to each variable, which is then used to determine the most desirable areas within your region.....

Based on the weighted percentages described on the previous pages, we created a map of the region, color-coded on a gradated scale from the least desirable (deep blue) to most desirable (bright red) spots.



#1 RANKING

CIRCLE 1



Overview

Few competitors immediately south of several bodies of water.

Positives

- 1. Saturation:** Both in terms of residents and employees per dental office, the level of competition in the market is low.
- 2. Real Estate Considerations:** Proximity to major roadways increases visibility and accessibility within the region.

Negatives

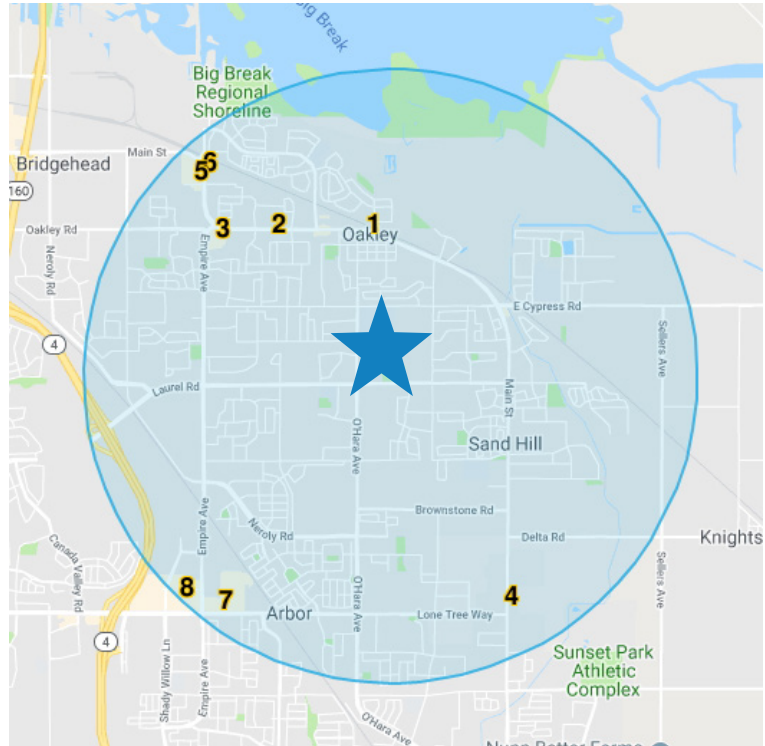
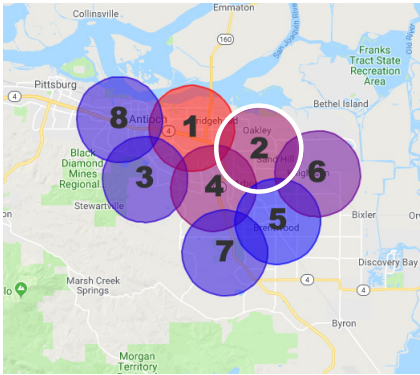
- 1. Competition Nearby:** Thirty-five general dental practices are located within three miles of the center of the circle.

Variable	Data	Percentile Rank	Ranking
Residents	41,906	N/A	N/A
Dental Offices	4	N/A	N/A
Population/ Dental Office	10,477	100.0%	1
Employees/ Dental Office	1,408	100.0%	1
Population Density	3,643	85.7%	2
Median Household Income	\$96,371	28.6%	6
Average Household Size	3.13	42.9%	5
Median Age	35.8	42.9%	5
Owner-Occupied Households	68.3%	14.3%	7
Population Growth (2010-2018)	9.83%	42.9%	5
Educational Attainment	20.71%	42.9%	5
Native English/ Spanish Speakers	89.0%	28.6%	6



#2 RANKING

CIRCLE 2



Overview

Low saturation in a densely-populated area.

Positives

- 1. Saturation:** Including a start-up, the area reports nearly 5,000 residents per general dental office.
- 2. Population Density:** With more than 40,000 residents inside of a two mile radius, there is a large market for dental care with limited vulnerability to new competition opening nearby.

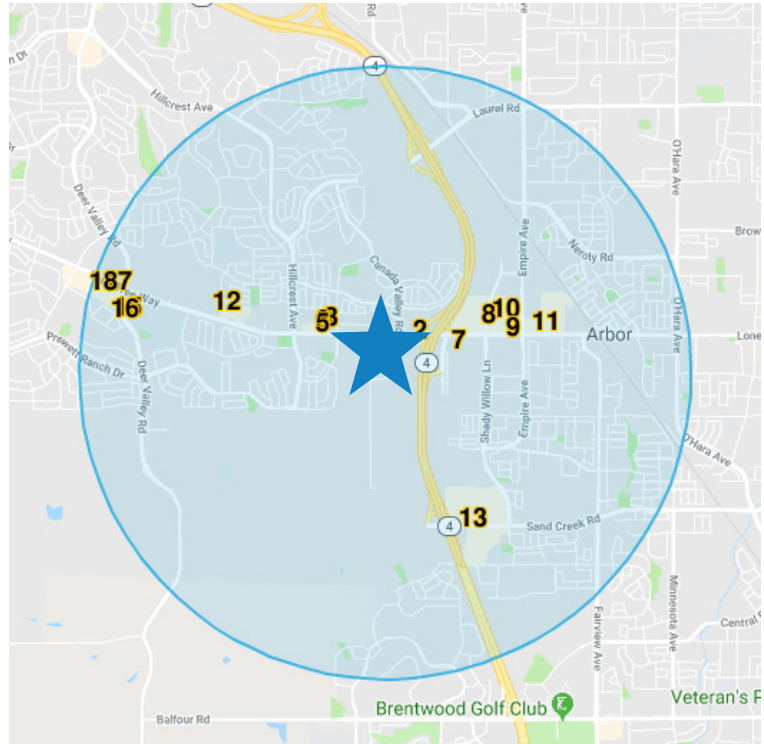
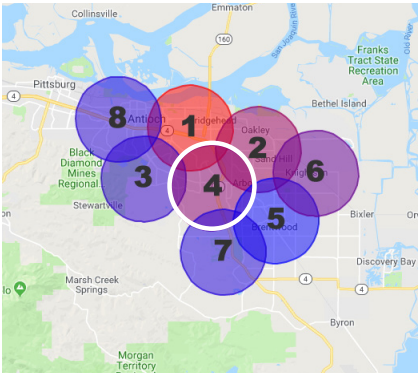
Negatives

- 1. Balance:** The majority of existing development within the region is found in the west, closer to additional competition.

Variable	Data	Percentile Rank	Ranking
Residents	43,785	N/A	N/A
Dental Offices	9	N/A	N/A
Population/ Dental Office	4,865	71.4%	3
Employees/ Dental Office	354	57.1%	4
Population Density	2,575	57.1%	4
Median Household Income	\$103,149	42.9%	5
Average Household Size	3.34	71.4%	3
Median Age	32.6	85.7%	2
Owner-Occupied Households	73.6%	57.1%	4
Population Growth (2010-2018)	10.48%	57.1%	4
Educational Attainment	16.04%	14.3%	7
Native English/ Spanish Speakers	91.4%	57.1%	4

#3 RANKING

CIRCLE 4



Overview

Competition clustering among upper-middle income families.

Positives

- 1. Demand for Dental Care:** At \$117,998, median household income ranks second in the study.
- 2. Real Estate Considerations:** John Marsh Heritage Highway expands the market's geographic footprint along the north-south axis.

Negatives

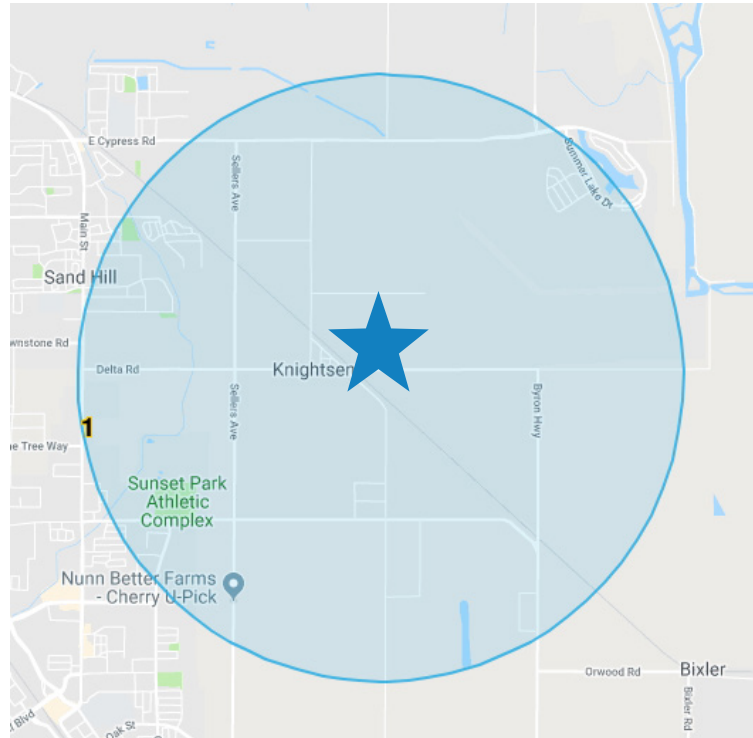
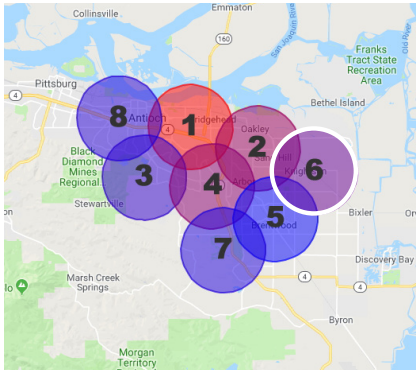
- 1. Saturation:** The ratio of residents per dental office inside of Circle 4 is approaching the recommended minimum of 2,000 to 1.

Variable	Data	Percentile Rank	Ranking
Residents	38,431	N/A	N/A
Dental Offices	19	N/A	N/A
Population/ Dental Office	2,023	28.6%	6
Employees/ Dental Office	316	28.6%	6
Population Density	3,364	71.4%	3
Median Household Income	\$117,998	85.7%	2
Average Household Size	3.37	85.7%	2
Median Age	34.2	57.2%	4
Owner-Occupied Households	74.4%	71.4%	3
Population Growth (2010-2018)	9.60%	0.0%	8
Educational Attainment	28.15%	71.4%	3
Native English/ Spanish Speakers	87.0%	14.3%	7



#4 RANKING

CIRCLE 6



Overview

Limited practicality on the developing urban fringe.

Positives

- 1. Growth:** In addition to the region's fastest growth rate since the 2010 Census, low density areas nearby provide logical locations for future construction.

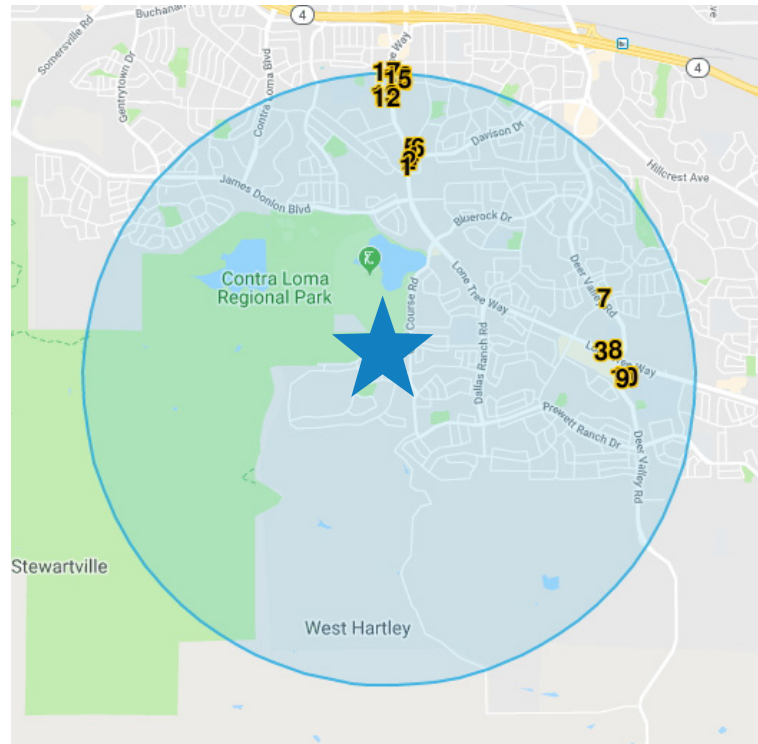
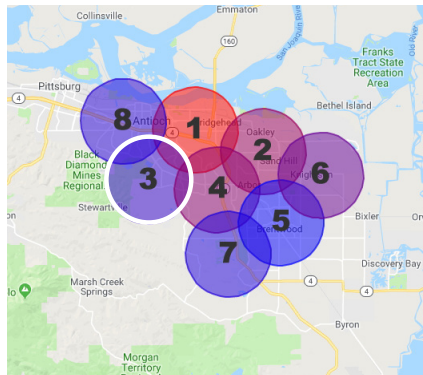
Negatives

- 1. Availability of Commercial Real Estate:** Practices may have yet to locate in the area due to a lack of suitable office space.
- 2. Population Density:** Only 11,394 potential patients live in Circle 6.

Variable	Data	Percentile Rank	Ranking
Residents	11,394	N/A	N/A
Dental Offices	2	N/A	N/A
Population/ Dental Office	5,697	85.7%	2
Employees/ Dental Office	574	85.7%	2
Population Density	636	0.0%	8
Median Household Income	\$88,433	14.3%	7
Average Household Size	3.53	100.0%	1
Median Age	31.2	100.0%	1
Owner-Occupied Households	71.5%	42.9%	5
Population Growth (2010-2018)	13.34%	100.0%	1
Educational Attainment	16.10%	28.6%	6
Native English/ Spanish Speakers	92.4%	71.4%	3

#5 RANKING

CIRCLE 3



Overview

Suburban community adjacent to areas unlikely to be developed.

Positives

- 1. **Demand for Dental Care:** Median household income and educational attainment respectively rank third and second in the study area.

Negatives

- 1. **Hard Boundaries:** Preserved greenspaces to the west limit growth and accessibility.
- 2. **Balance:** Both commercial and residential uses are primarily found in the northern portions of the circle.

Variable	Data	Percentile Rank	Ranking
Residents	39,100	N/A	N/A
Dental Offices	18	N/A	N/A
Population/ Dental Office	2,172	42.9%	5
Employees/ Dental Office	283	14.3%	7
Population Density	902	14.3%	7
Median Household Income	\$113,091	71.4%	3
Average Household Size	3.32	57.1%	4
Median Age	37.0	28.6%	6
Owner-Occupied Households	75.7%	85.7%	2
Population Growth (2010-2018)	9.73%	14.3%	7
Educational Attainment	28.40%	85.7%	2
Native English/ Spanish Speakers	81.6%	0.0%	8

Supporting Data

Hot Spot Clustering: As opposed to a single highly rated circle in a very competitive area, clusters of hot spots indicate a larger under-served market. They send a clear message as to where the most desirable areas within a region are to locate a new practice and reduce the odds of anomalies in the data. In this case, we found hot spots to be generally located in the central portions of the study area.

Real Estate Considerations: In addition to the demographic and competitive inputs analyzed by this report, property-specific factors such as visibility, accessibility and price are an important component of the site selection process.

As your search progresses to distinct properties, the two (demographic and real estate variables) should be considered side by side.

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THIS INFORMATION HAS BEEN PROVIDED BY KIMBALL ASSOCIATES, INC. AS A THIRD-PARTY RESOURCE FOR INDIVIDUALS OR COMPANIES EVALUATING THE BENEFITS OF TENANCY AND/OR INVESTMENT IN OAKLEY PROFESSIONAL CENTER.

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