

Appendix B:
**Economic Context
Report**

Final Report

Stockton Boulevard Specific Plan Economic Context

The Economics of Land Use



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City of Sacramento

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1. Introduction and Summary of Findings

The City of Sacramento (City) initiated the process of preparing a specific plan and action plan for the Stockton Boulevard corridor and surrounding neighborhoods that will lead to an invested and vibrant Stockton Boulevard with equitable outcomes for existing residents and businesses. Through a comprehensive planning effort based on robust stakeholder involvement, appropriate technical analyses, and targeted economic development strategies, the Stockton Boulevard Plan (Plan) will provide residents and businesses with the opportunity to directly influence development and prioritize funding and resources to increase quality of life and improve social, financial, and health outcomes. The Stockton Boulevard corridor was specifically chosen based on myriad factors, including: numerous, currently vacant parcels along the corridor which present new development opportunities; the development of Aggie Square, a significant mixed-use project on the northern end of the corridor; its role as a major transportation corridor; and its location adjacent to several historically disinvested neighborhoods.

This report presents existing economic conditions and summarizes estimated real estate market demand for residential and nonresidential land uses in the broader Stockton Blvd Strategic Neighborhood Action Plan (SNAP) Study Area (see **Map 1-1** for the boundaries of the SNAP Plan Area and Study Area). Key findings from this report, as well as findings from a forthcoming assessment of residential and nonresidential gentrification risk in the Study Area, stakeholder input, and other technical analyses will be used to inform action-based strategies included as part of the Plan.

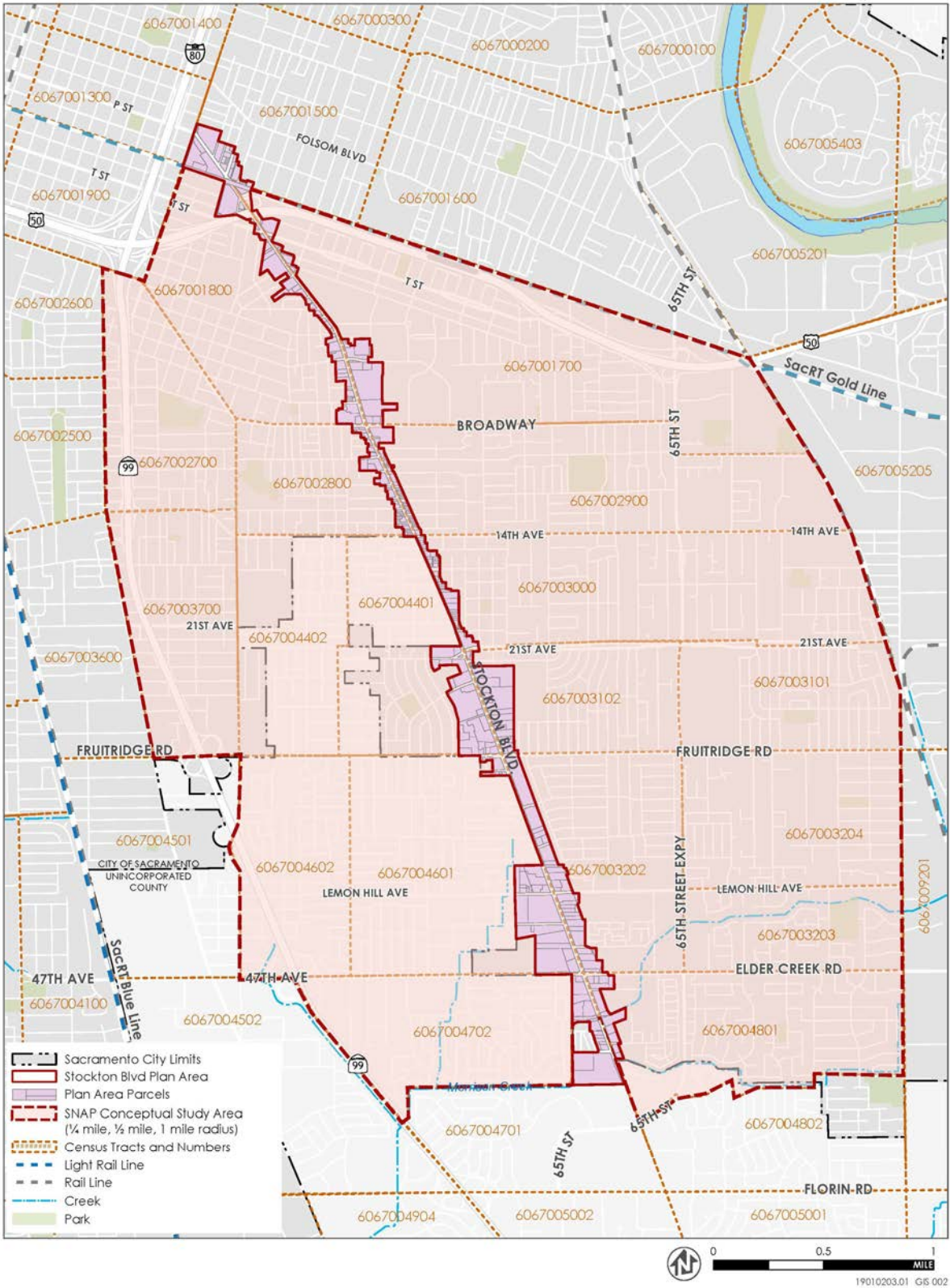
Stockton Boulevard Plan Area and Study Area

More than 100 years ago, Stockton Boulevard was constructed as the primary connector between the cities of Sacramento and Stockton, offering access for both automobiles and interurban train service, as well as local streetcar services to inner-ring neighborhoods (Colonial Heights and Colonial Acres).¹ Train services ceased operations in the 1930s and streetcar services were stopped in the 1940s, likely based on declines in ridership. By the early 1960s, the construction of California State Highway 99 (Hwy 99) replaced Stockton Boulevard's function as the primary regional transportation artery.²

¹ Steinberg, Barbara, 2018. Falling in Love with Stockton Boulevard. *Are You That Woman*. [online] Available at: <https://www.areyouthatwoman.com/2018/03/falling-in-love-with-stockton-boulevard.html> [Accessed January 2021].

² Ibid.

Map 1-1. Stockton Boulevard Plan Area and Defined Study Area



Today, Stockton Boulevard continues to serve as an important five-lane corridor, connecting downtown to south Sacramento and multiple diverse neighborhoods to the east and west of the corridor and accommodating one of Sacramento Regional Transit's (RT) busiest bus routes.

Plan Area and Study Area Land Uses

The Stockton Boulevard Plan area comprises approximately 420 acres (424 parcels) with about 280 acres of commercially zoned property along a 4.8-mile segment of Stockton Boulevard within the City, spanning from Alhambra Boulevard to the north to the City's southern boundary to the south. The Plan Area is estimated to include 60 vacant parcels totaling almost 49 acres, or 14 percent of the total acreage. See **Table 1-1** for a summary of land uses in both the Plan Area and Study Area, which is described in more detail in the next section.

Table 1-1 Stockton Boulevard Plan Area and Study Area by Current Land Use Designation

Item	Plan Area [1] [2]			Study Area [1]		
	Parcels	Acres	% of Total Acreage	Parcels	Acres	% of Total Acreage
Land Use						
Residential	138	55.8	13.2%	24,854	4,240.2	73.4%
Commercial						
Retail/Commercial	184	183.2	43.5%	573	335.2	5.8%
Office	43	68.7	16.3%	113	195.2	3.4%
Medical	12	31.1	7.4%	46	127.6	2.2%
Subtotal Commercial	239	283.0	67.2%	732	658.0	11.4%
Agriculture	0	0.0	0.0%	2	0.4	0.0%
Industrial	18	27.9	6.6%	110	192.8	3.3%
Public	10	40.7	9.7%	102	360.0	6.2%
Recreational	4	3.2	0.8%	9	7.5	0.1%
Other	15	10.8	2.6%	425	318.0	5.5%
Total	424	421.4	100.0%	26,234	5,776.9	100.0%

Source: Ascent Stockton Boulevard Plan Area; County of Sacramento; EPS.

[1] Parcel and acreage information excludes Right-of-Way (ROW).

[2] Land Use acreage in Plan Area includes an estimated 60 acres of vacant land with a range of residential and nonresidential zoning designations.

To evaluate the economic context of Stockton Boulevard and adjacent neighborhoods, the City and consultant team defined a Specific Plan Study Area (Study Area), which encompasses approximately 7,400 total acres comprising about 5,400 acres of land in the City and about 2,000 acres of land in Sacramento County (County), near the southern boundary of the Study Area.³ There are over 26,000 parcels in the Study Area consisting of about 5,800 acres (not including rights-of-way). The Study Area is bounded by U.S. Highway 50 (Hwy 50) and the Sacramento RT Light Rail Gold Line to the north, Power Inn Road to the east, Morrison Creek to the south, and Highway 99 to the west. As of 2018, the Study Area contained over 86,000 residents (accounting for almost 17 percent of City residents), with almost 31,900 housing units (about 16 percent of the City's housing supply), and 31,300 jobs (representing about 10 percent of total jobs in the City).

See **Map 1-1** for the boundaries of both the Plan area and the defined Study Area.

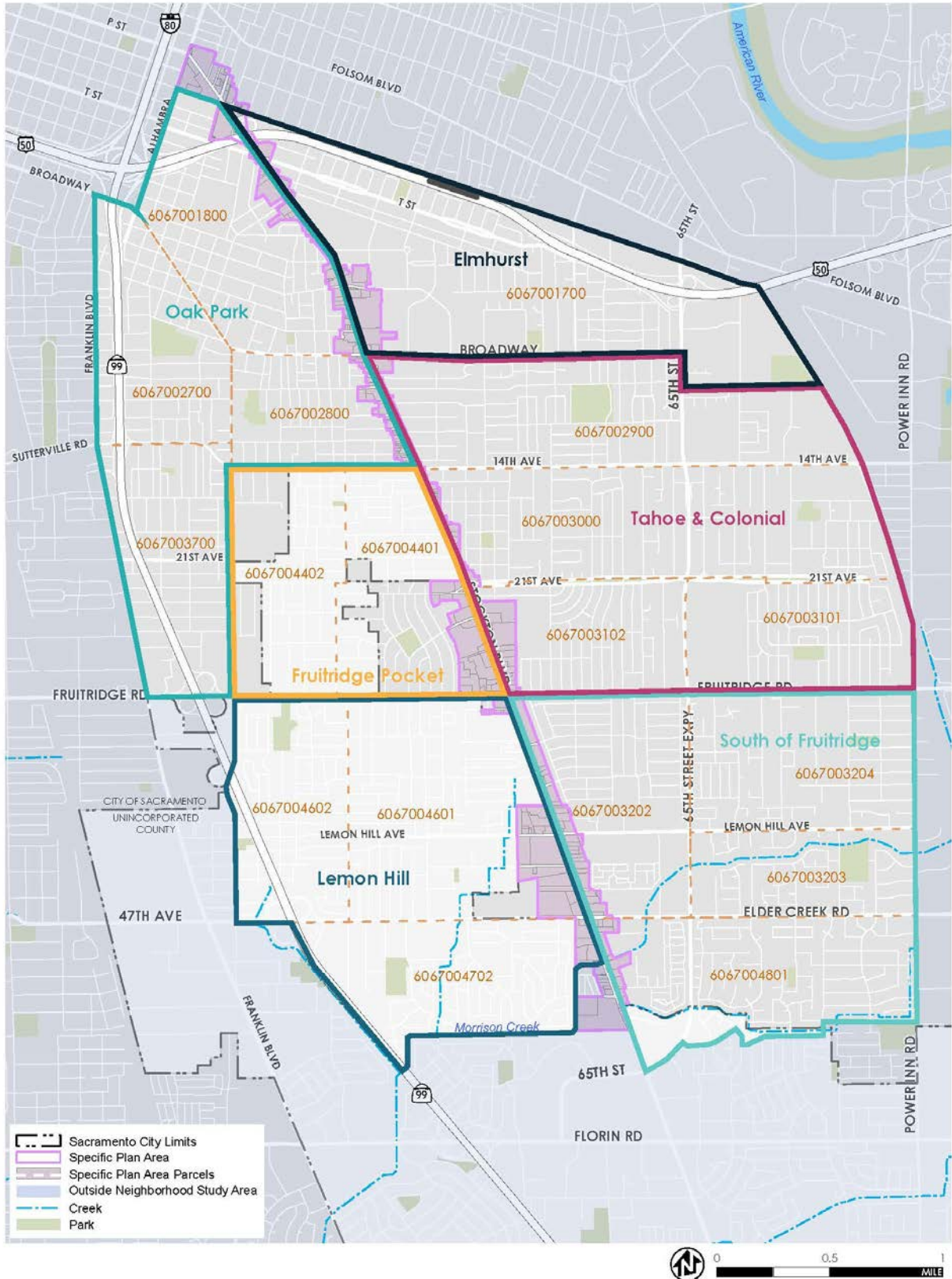
The Study Area has been delineated into the following six Subareas to distinguish socioeconomic trends occurring within the Study Area: Elmhurst; Oak Park; Fruitridge Pocket; Tahoe & Colonial; Lemon Hill; and South of Fruitridge. See **Map 1-2** for Subarea boundaries. All Subareas are within the City boundaries, except for Fruitridge Pocket and Lemon Hill, which both include portions of unincorporated Sacramento County. It is important to note these Subareas follow U.S. Census Tract boundaries rather than neighborhood boundaries and include multiple neighborhoods, as described below.⁴

- The **Elmhurst Subarea** is bounded by Hwy 50 and the Light Rail Gold Line to the north, railroad tracks to the east, Broadway to the south, and Stockton Boulevard to the west. This Subarea is one of the smallest subareas with approximately 870 acres and contains neighborhoods in the northeastern portion of the Study Area and to the east of Stockton Boulevard, including Elmhurst, the east side of Med Center, Fairgrounds, the north portion of Tahoe Park, and a small portion of East Sacramento between the light rail tracks and Hwy 50. This Subarea contains the UC Davis Medical Center, the Shriners Hospital for Children, the Sacramento Municipal Utility District (SMUD) headquarters, and the recently approved Aggie Square mixed-use innovation and research project, led by a public-private partnership consisting of UC Davis, Wexford Science & Technology, and GMH Capital Partners, and described in more detail later in this report.
- The **Oak Park Subarea**, considered one of the first suburbs of the City of Sacramento, is bounded by Hwy 50 to the north, Stockton Boulevard to the east, Fruitridge road to the south, and Highway 99 to the west. This Subarea includes the neighborhoods in the northwestern portion of the Study Area, including the west side of Med Center, North Oak Park, Central Oak Park, South Oak Park, and the easternmost portions of Curtis Park and North City Farms. This Subarea contains new

³ Note that the Study Area does not align with the northern and southern boundaries of the Plan Area because the Study Area uses Census Tract boundaries whereas the Plan Area uses parcel boundaries. See **Map 1-2**.

⁴ See **Appendix C, Table C-1** for a list of Study Subarea by Census Tract.

Map 1-2. Stockton Boulevard Study Area and Study Subareas



development and redevelopment along Broadway, Pacific McGeorge School of Law, and a proposed 151-room hotel project located across from the UC Davis Medical Center.⁵

- The **Fruitridge Pocket Subarea** is the smallest Subarea with approximately 645 acres bounded by 12th Avenue to the north, Stockton Boulevard to the east, Fruitridge Road to the South and the City boundary to the west. This Subarea includes portions of unincorporated Sacramento County and the Lawrence Park neighborhood.
- The **Tahoe & Colonial Subarea** is the largest Subarea with approximately 1,795 acres bounded by Broadway and 14th Avenue to the north, Power Inn Road to the east, Fruitridge Road to the south, and Stockton Boulevard to the west. This Subarea comprises the neighborhoods of Tahoe Park, West Tahoe Park, Tahoe Park East, the west portion of Ramona Village, Colonial Heights, Tahoe Park South, Colonial Manor, Tallac Village, Colonial Village, and the northern portion of Fruitridge Manor.
- The **Lemon Hill Subarea** is mainly comprised of unincorporated Sacramento County with a small pocket in the City of Sacramento, that includes the Sacramento City Unified School District (SCUSD) Offices and the west side of the Little Saigon designation. This Subarea is bounded by Fruitridge Road to the North, Stockton Boulevard to the east, Morrison Creek to the south, and Highway 99 to the west with a small area to the west of Highway 99. The neighborhoods in this Subarea include Southwest, Daystar, Pacific Terrace, Cloverdale Village, Danielle Place, Rural California, El Paraiso Estates, and Fruitridge Vista.
- The **South of Fruitridge Subarea** is the second largest Subarea with 1,510 acres bounded by Fruitridge Road to the north, Power Inn Road to the east, Morrison Creek to the south with a small area south of the Creek, and Stockton Boulevard to the west. This Subarea contains the east side of the Little Saigon designation. Neighborhoods in this Subarea include Fruitridge Manor, Avondale, Southeast Village, and Glen Elder.

Summary of Findings

Socioeconomic Conditions

- **The percentage of residents within “Communities of Color” is shifting from the northern Subareas to southern and eastern Subareas in the Study Area.** Between 2010 and 2018, the percentage of the Study Area’s population that identifies as a race or ethnicity considered a “community of color” remained constant, around

⁵ Van de Meer, Ben, 2020. Hotel project near UC Davis Medical Center revised. Sacramento Business Journal [online] Available at <https://www.bizjournals.com/sacramento/news/2020/10/13/hotel-project-near-uc-davis-medical-center-revised.html> [Accessed January 2021].)

70 percent of the Study Area's total population, and slightly higher than the Citywide average which increased from 64 percent in 2010 to 68 percent in 2018.⁶ Notably, between 2010 and 2018, the percentage of the population that identifies as a "community of color" shifted from the northern Subareas, with percentage declines in Elmhurst and Oak Park to Subareas to the east and south, including Tahoe & Colonial, Lemon Hill, and South of Fruitridge Subareas, which experienced percentage increases. The population that identifies as Black or African American has remained steady in the Study Area overall. However, the historically Black and African American community of Oak Park experienced significant declines for this population countered with large increases in the Black and African American population in the Fruitridge Pocket Subarea. See **Map 2-1** for the percentage change in communities of color between 2010 and 2018.

- **Socioeconomic trends suggest the Study Area's population is becoming wealthier and more educated, although these trends are not universal across all Subareas.** As of 2018, median household income in the Study Area remains well below the citywide average. However, the overall median household income in the Study Area was \$44,700, an increase of 24 percent since 2010 compared to the City's 16 percent increase during the same period. Notably, the Elmhurst and Tahoe & Colonial Subareas and the northern portion of Oak Park have a greater concentration of higher-earning households, with median household incomes around \$60,000, exceeding the citywide average (\$58,500). In contrast, households in the central and southern portions of the Oak Park Subarea and the Subareas of Fruitridge Pocket, Lemon Hill, and South of Fruitridge have a much lower median income (about \$37,000). Similarly, although the average level of educational attainment in the Study Area is lower than the City's, there was a substantial shift between 2010 and 2018, with greater proportions of the Study Area's residents possessing secondary and post-graduate education degrees. See **Map 2-2** for 2018 median household income and **Figure 2-7** for changes in educational attainment.
- **Poverty rates in the Study Area have significantly declined since 2010 although they remain higher than the Citywide average.** As of 2018, about 27 percent of residents in the Study Area had incomes that fell below the national poverty level, down 16 percent from a poverty rate of 32.4 percent in 2010. In contrast, the Citywide poverty rate of 18.3 percent declined about 10 percent between 2010 and 2018. Nearly all Subareas in the Study Area experienced declines in the percentage of residents living under the poverty level, with the greatest declines occurring in the Oak Park Subarea (a 35.5 percent decrease) and Fruitridge Pocket Subarea (a nearly 22 percent decrease). The percentage of individuals living in poverty increased nominally in the Tahoe & Colonial Subarea (an increase of 3 percent), and slightly more in the Lemon Hill Subarea (an increase of about

⁶ For the purpose of this analysis, "communities of color" include populations that identify as Black or African American, American Indian and Alaska Native, Asian, Native Hawaiian and Other Pacific Islanders, Hispanic or Latino, Some other Race, and Two or More Races in the U.S. Census Bureau American Community Survey (ACS).

7 percent). See **Figure 2-10** for poverty rates and percentage change in poverty rate between 2010 and 2018.

- **The Study Area is a strong employment node within the City with employment and growth concentrated in three primary industries: Health Care; Educational Services; and Utilities.** As of 2018, the Study Area contained about 31,300 jobs representing about 10 percent of jobs in the City. Bolstered by key employers including the UC Davis Medical Center; Shriners Hospital for Children; the SCUSD offices; and the SMUD headquarters, employment in the Health Care and Social Assistance, Educational Services, and Utilities industries represents nearly 70 percent of all jobs in the Study Area. Between 2010 and 2018, the Study Area added close to 2,600 jobs, primarily in Health Care, Educational Services, and Utilities. One of the largest proposed projects in the Study Area, the Aggie Square mixed-use innovation and research project in the Elmhurst Subarea, is projected to add nearly 3,600 (direct or onsite) jobs to the Study Area at buildout.⁷ See **Figure 2-11** and **Appendix A** for details regarding Study Area employment by industry.
- **Despite the significant number of jobs in the Study Area, most Study Area residents commute to jobs outside of the Study Area.** Ninety-six percent of the 36,500 employed residents commute outside of the Study Area for work. Conversely, over 95 percent of the nearly 31,300 employees who work in the Study Area commute in from elsewhere. Although the top industry of employed residents is the Health Care industry, and the northern Subareas of Oak Park and Tahoe & Colonial experienced recent labor force gains in this industry, most labor force growth between 2010 and 2018 occurred in the following industries, which are not the most prominent in the Study Area: Construction; Retail Trade; Accommodation and Food Services; and Professional, Scientific & Technical Services. Given the high proportion of local residents who commute out of the area for employment, future economic development efforts should be focused on creating local opportunities for Study Area residents, accounting for the industries, occupations, educational and skills training of existing residents. See **Appendix A** for details regarding Study Area resident employees by industry.

Housing Market Findings

- **Residential sales prices are increasing in the Study Area at a higher rate than median household incomes, whereas median incomes are keeping pace with rental rates.** As of 2018, the Study Area's median home sales price was approximately \$260,000, about 75 percent of City's median home sales price. With the exception of the Elmhurst Subarea, which had a median home sales price about

⁷ EPS, 2020. Aggie Square Phase 1 and 2 Regional Economic Impact and City Fiscal Analysis. [online] Available at https://sacramento.granicus.com/MetaViewer.php?view_id=21&event_id=3821&meta_id=602712 [Accessed January 2021].

125 percent higher than the Citywide average, all Subareas had a substantially lower median home sales price ranging from \$234,500 in Fruitridge Pocket to \$307,000 in the Tahoe & Colonial Subarea. Between 2010 and 2018, median sales prices in the Study Area and the City have risen substantially over the past 8 years, with a much larger increase in the Study Area (nearly 120 percent increase) relative to the City (85 percent increase). Median home sale prices in the Study Area surpassed the growth of median household incomes in every Subarea, with greater disparities of growth in the Tahoe & Colonial, Oak Park, and Fruitridge Pocket Subareas. The Tahoe & Colonial and Oak Park Subareas experienced the greatest amount of growth, with median sales prices rising by 242 percent and 219 percent, respectively. The Elmhurst Subarea experienced the lowest growth increase, although still substantial at a nearly 95 percent increase, which exceeded Citywide median sales growth.

- **Residential rental rates have not risen as dramatically as home sales prices in the Study Area and remain lower than average rental rates Citywide.** With the exception of the Lemon Hill Subarea, median household incomes in the Study Area are keeping pace with median residential rental rates. Rental rates in the Study Area increased 21 percent, while median household incomes grew by almost 24 percent. In comparison, residential rental rates Citywide increased by nearly 40 percent and median household income increased by only 16 percent. The Elmhurst, Oak Park, and South of Fruitridge Subareas experienced the largest income growth with median incomes surpassing rent growth by 13 to 17 percent, Tahoe & Colonial was smaller with a difference of 9 percent, where Fruitridge Pocket's increase in rent and income equaled out, and Lemon Hill's rent increase outpaced income growth.

Estimated Residential Growth and Demand

- **The Study Area population is projected to grow by nearly 15 percent by 2040.** As of 2020, the Study Area contained nearly 87,000 residents and almost 30,000 households. Based on Sacramento Area Council of Government (SACOG) projections, the Study Area is estimated to add almost **11,800 new residents** and **4,040 new households** by 2040. This level of growth translates into average, annual growth of about 590 residents and 200 households over the next 20 years. In comparison, between 2010 and 2018, the Study Area grew by an average of 480 residents and 170 households per year. This growth is based on data from the American Community Survey (ACS) and SACOG, historical population and household trends and projected growth through 2040. For context, the Study Area is estimated to represent 12 percent of total Citywide population growth and 6 percent of household growth.
- **Residential demand in the Study Area for affordable housing units outweigh the need for market rate units.** In the Study Area there is a projected demand for an additional 4,240 housing units, or an average of 212 new housing units per year, between 2020 and 2040, as shown in **Table 4-3 in Chapter 4**. If projected demand

is fully realized, the Study Area would grow from a total of 31,900 units to 36,100 units by 2040, representing a 13 percent increase over this period. Applying 2018 income distribution percentages to future Study Area housing units establishes a projected demand for the addition of 1,130 market rate units (27 percent of total units demanded) and 3,110 affordable units (73 percent of total units demanded).

Affordable housing, as described in this Study, may comprise housing funded through Federal, State, and local housing programs and may also comprise housing that is affordable by design (i.e., based on size, type, construction materials, or other factor). Affordable housing is defined in this Study as ownership- and renter-occupied housing whose monthly cost does not exceed 35 percent of monthly gross household income, based on income standards for households of 3 which meet “low income” (or lower) income guidelines per the State of California Department of Housing and Community Development (HCD).^{8 9} As of 2020, based on income limits for households of 3 in Sacramento County, housing with a value at or below \$245,000 for owner-occupied homes and at or below \$1,800 per month for renter-occupied homes are defined as affordable. Conversely, market rate homes comprise housing valued above \$245,000 for owner-occupied homes and above \$1,800 per month in rent for renter-occupied homes.

Commercial Market Findings

- **Demand for commercial development will likely be limited to neighborhood-serving retail uses.** Although the COVID-19 Pandemic (Pandemic) has had an impact on the retail sector, over the long term, new projected household growth is expected to generate additional demand for neighborhood-serving retail development. The Study Area has not experienced much nonresidential development, but the retail sector in the Study Area has experienced recent activity and has remained steady with low vacancy and competitive lease rates. There is limited demand for office space in the Study Area and demand for additional medical office space, if any, may be met with the addition of the proposed Aggie Square project, given its location adjacent to existing medical facilities and synergistic land uses.

Estimated Commercial Retail Demand

- **Estimated Commercial retail demand from incremental new households in the Study area is enough to support a medium-sized neighborhood-oriented commercial center.** The Study Area is estimated to capture newly created demand from residential growth in the Study Area. Incremental new Study Area household

⁸ The assumption that housing costs should represent approximately 35% of gross monthly household income is derived from the City's Mixed Income Housing Income Ordinance, adopted in 2015 (Chapter 17.712 of the City Code).

⁹ This Study uses a household size of 3 to derive incomes based on the average persons per household in the Study Area of 2.9. See **Figure 2-1** in **Chapter 2**.

spending is estimated to range from about \$17.4 million to \$52.2 million. Based on this level of household spending, additional supportable retail square feet from new households may range from about **40,100** to **120,230 retail square feet**, as shown in **Table 4-5** in **Chapter 4**. If this estimated demand for new retail space is realized, the additional development would represent a 2 to 5 percent increase in the Study Area's current retail supply of 2.7 million square feet. Note that the projected supportable retail space shown in this Study is a conservative estimate based on data available at this time.

The Study Area may be able to support additional retail space beyond what is estimated in this Study through the capture of additional sources of demand (i.e., existing retail leakage; employee spending; pass-by traffic from populations outside of the Study Area). It is anticipated that this retail demand analysis may be refined, as needed, following supplemental conversations regarding community preferences related to new retail outlets, and the feasibility of specific retail concepts and tenants.

Report Organization

This report is presented in the following chapters and technical appendices.

- 1. Introduction and Summary of Findings** presents an overview of the report and key findings.
- 2. Study Area Profile** presents an analysis of existing conditions in the Study Area, including population, households, race/ethnicity, educational attainment, income and poverty, employment and jobs, and jobs-housing balance and commuting patterns.
- 3. Residential and Commercial Market Overview** provides a context to current residential and commercial market conditions in the nation, the City of Sacramento, and the Study Area.
- 4. Future Growth and Market Demand** provides overview of projected growth and the potential resulting demand for additional housing and retail.

This report also contains technical appendices, **Appendix A**, **Appendix B**, and **Appendix C**, which provide supporting data regarding socio-economic trends in the Study Area.

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2. Study Area Profile

This chapter examines the trends and existing composition of demographic and socioeconomic characteristics in the Study Area, in aggregate and by Subarea, relative to the City. The purpose of this demographic and socioeconomic profile is to develop an understanding of the dynamics and drivers likely to affect the type and magnitude of development in the Study Area. This chapter comprises the following key analytic elements:

- **Demographic and Socioeconomic Characteristics.** Identifies trends in population and households, age, race and ethnicity, educational attainment, income and poverty, and jobs-housing balance and commuting patterns.
- **Labor Force.** Reflects trends in labor force and unemployment rates, including industry and employment characteristics and commuting patterns.
- **Employment.** Presents information on the quantity and type of jobs in the Study Area.

Supporting data tables underlying figures presented in this chapter are included in **Appendix A**.

Demographic Conditions

Population and Households

In 2018, the Study Area included about 86,000 residents within 29,644 households, accounting for just under 20 percent of the City's population.¹⁰ Between 2010 and 2018, the Study area added 3,800 residents and 1,400 households. Population growth in the Study Area during this time was primarily concentrated in the Tahoe & Colonial Subarea, with an increase of almost 1,900 residents, followed by the Oak Park and Lemon Hill Subareas, which added 1,120 residents and 720 residents, respectively. The Fruitridge Pocket and Elmhurst subareas experienced minimal growth, while the South of Fruitridge Subarea experienced a decline in both population and households. See **Figure 2-1**.

During this time, the population growth rate in the Study Area was substantially lower than the City's, although growth in households was similar for both geographies.

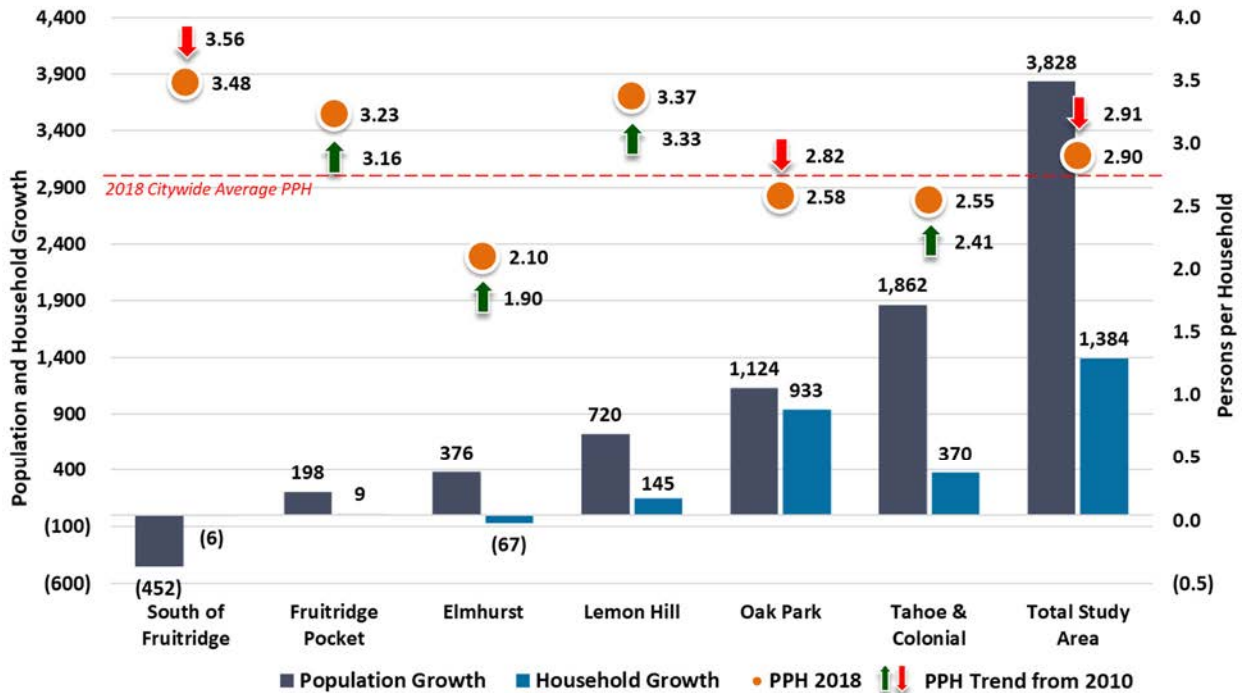
Between 2010 and 2018, the Study Area experienced an increase in smaller households (a decline in average persons per household). In contrast, the City experienced an increase in *larger* households (an increase from an average of 2.68 to 2.78 persons per household), likely based on the type and size of residential development occurring in new

¹⁰ Please note that the term "household" denotes an occupied dwelling unit.

growth areas of the City (e.g., Natomas). The Oak Park Subarea experienced the largest decline in household size, from 2.82 persons per household in 2010 to 2.58 persons per household in 2018. Conversely, the Elmhurst Subarea experienced a slight increase in average household size, growing from 1.90 to 2.10 persons per household.

Despite this increase, Elmhurst’s average household size remains significantly lower than the Citywide average and all other Study Subareas. Compared to the Citywide average household size, the northern Subareas of Elmhurst, Oak Park, and Tahoe & Colonial all have smaller households, on average, while the southern Subareas of Fruitridge Pocket, Lemon Hill, and South of Fruitridge all have larger households, on average. See **Figure 2-1**.

Figure 2-1. Change in Population and Households (2010-2018) and Persons per Household (PPH) (2018)

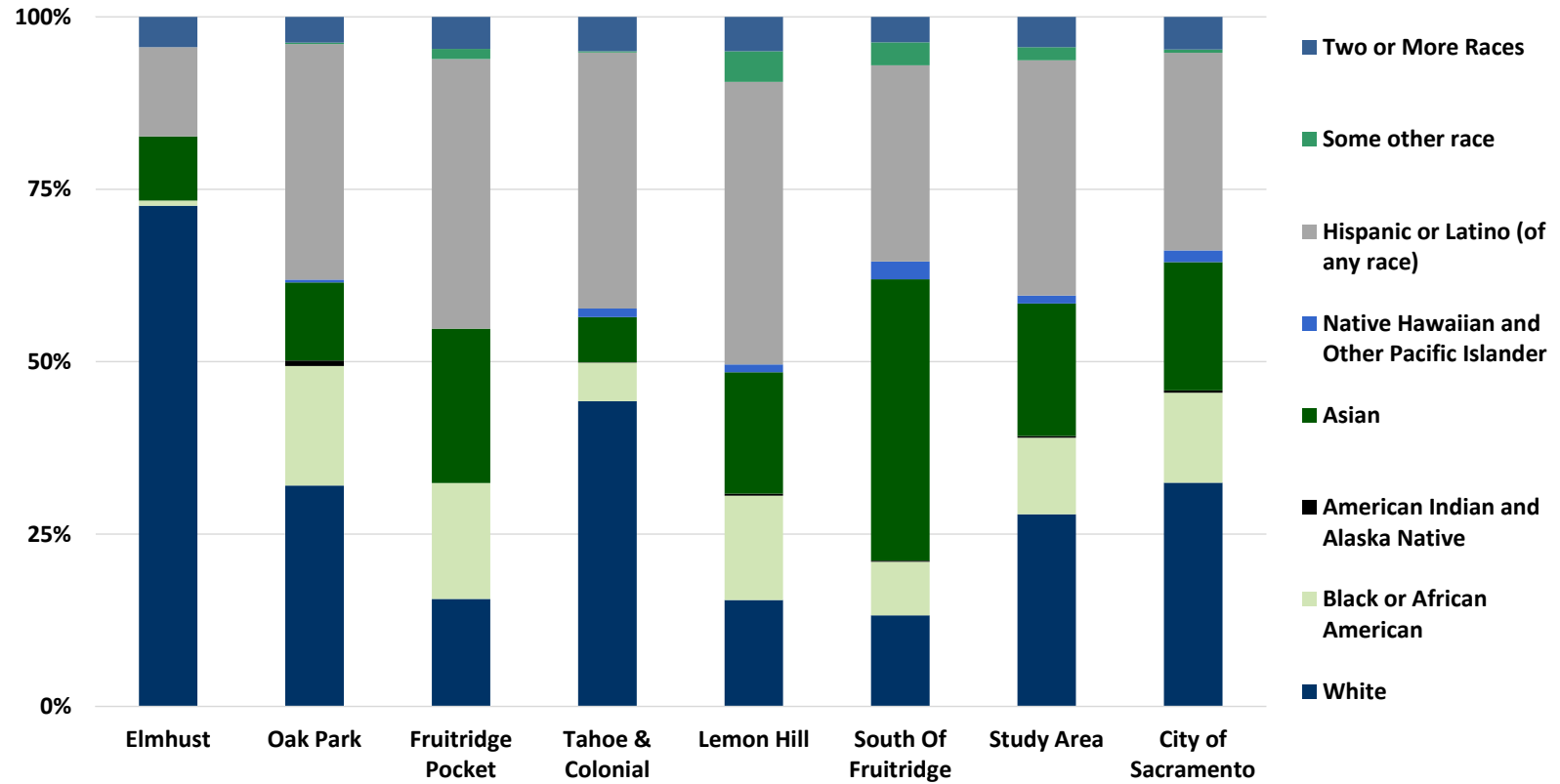


Source: U.S. Census ACS 5-Year Estimates DP05 2010 and 2018; EPS.

Race/Ethnicity

In 2018, the Study Area’s population predominately identified as Hispanic or Latino (34 percent) followed by populations that identify as White (28 percent) and Asian (19 percent). These three populations also comprise the largest percentages within the City as a whole, although in a different order (White – 33 percent, Hispanic or Latino – 29 percent, and Asian – 19 percent). See **Figure 2-2**. The population that identifies as Black or African American has remained steady in the Study Area. However, in the

Figure 2-2. Race/Ethnicity Allocation: Study Area and City of Sacramento (2018)



Source: U.S. Census ACS 5-Year Estimates DP05 2018; EPS.

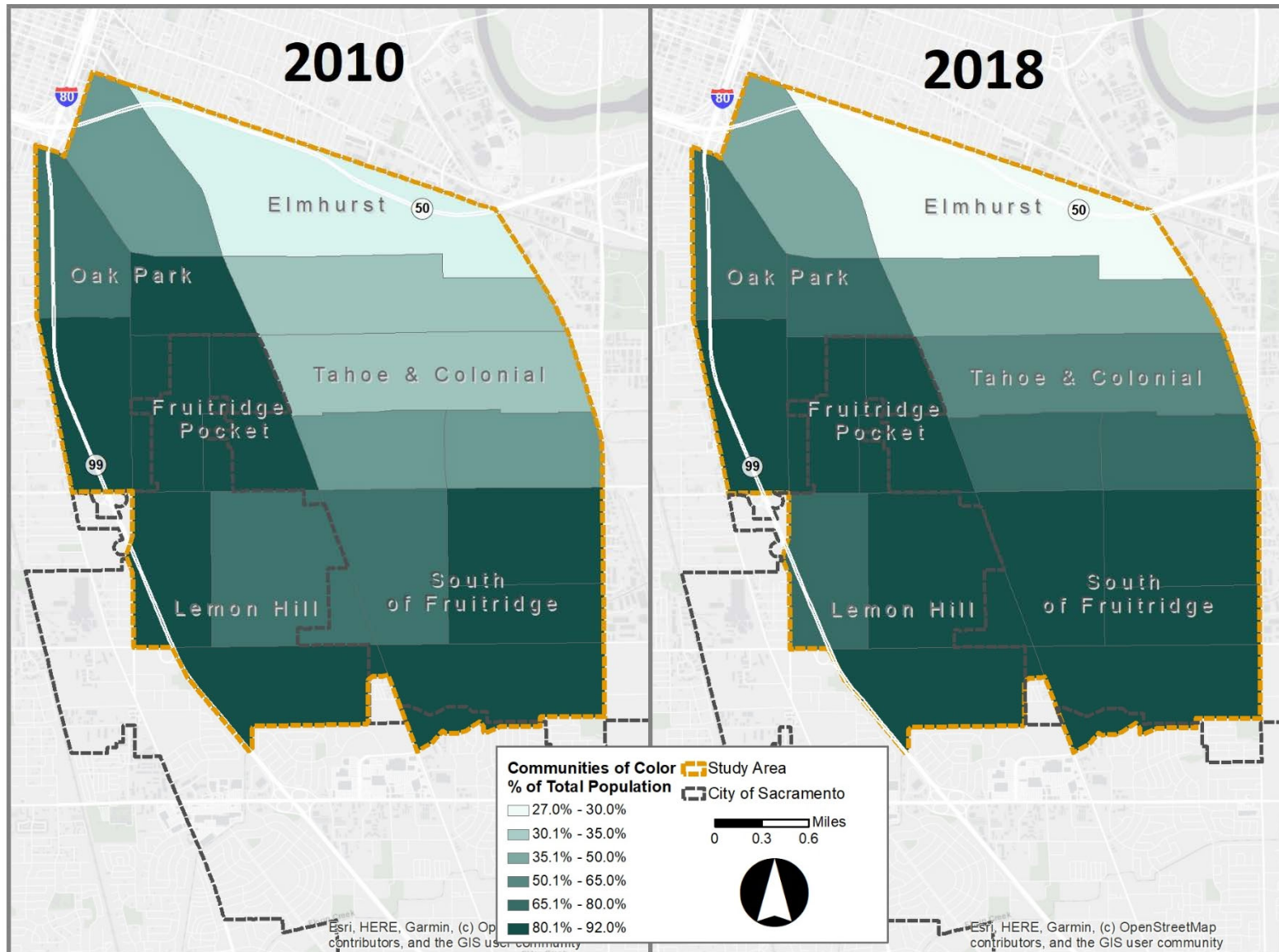
historically Black and African American community of Oak Park, there have been large declines for the Black and African American population between 2010 and 2018, countered with large population growth of the Black and African American population in the Fruitridge Pocket Subarea.

White and Asian populations represent the fastest growing categories in the Study Area over the 2010 to 2018 period, in particular in the two northern subareas of Elmhurst and Oak Park. The populations that identify as Some Other Race and as Two or More Races also represented a category showing growth within the Study Area, specifically in the Fruitridge Pocket, Lemon Hill, and South of Fruitridge Subareas.

The percentage of the Study Area's population that identifies as a race or ethnicity considered a "community of color" remained steady between 2010 and 2018, comprising approximately 70 percent of the total population, whereas, the City of Sacramento's "community of color" population has been consistently lower than the Study Area (64 percent of the City's total population in 2010 and 68 percent in 2018).¹¹ As shown in **Map 2-1** the percentage of the population that identifies as a "community of color" shifted from the northern Subareas, with percentage declines in Elmhurst and Oak Park between 2010 and 2018, to Subareas to the east and south, including Tahoe & Colonial, Lemon Hill, and South of Fruitridge Subareas, which experienced percentage increases.

¹¹ For the purpose of this analysis, "Communities of Color" include populations that identify as Black or African American, American Indian and Alaska Native, Asian, Native Hawaiian and Other Pacific Islanders, Hispanic or Latino, Some other Race, and Two or More Races in the ACS.

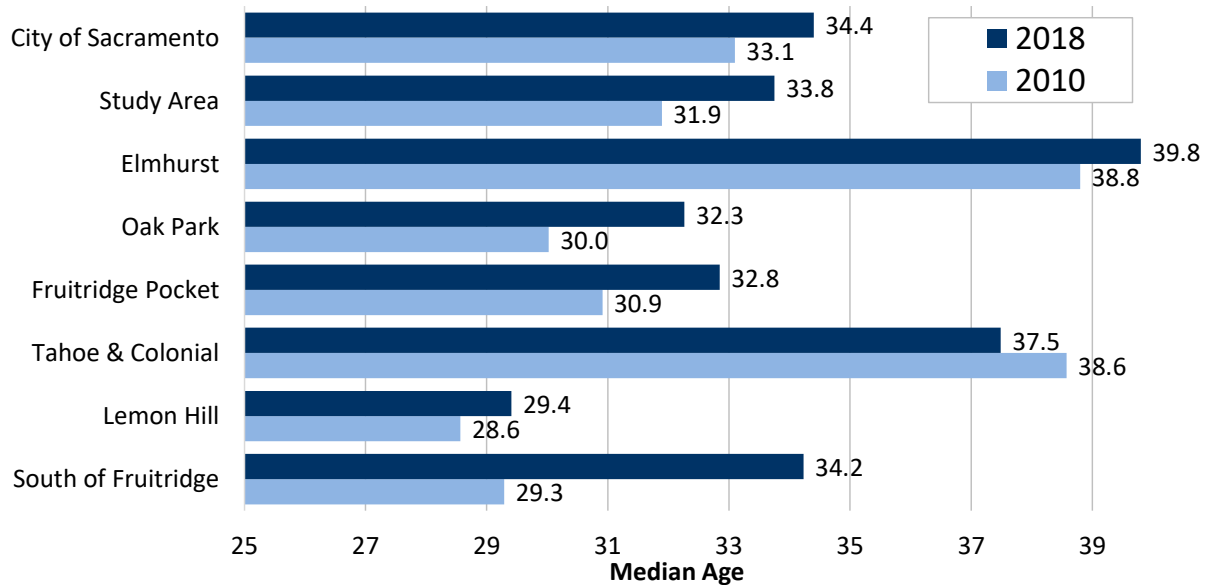
Map 2-1. Communities of Color Percentage of Total Population: Study Area (2010 and 2018)



Age

The age range distribution and median age in the Study Area align with the City, with both areas comprising a population with a median age of about 34 years old. Between 2010 and 2018, the median age increased in both areas, consistent with national and global aging population trends. Within the Study Area, the median age increased moderately in each subarea, except for South of Fruitridge, which experienced a significant, 17 percent increase in median age and in Tahoe & Colonial, which experienced a nominal decline in median age. See **Figure 2-3**.

Figure 2-3. Median Age: Study Area and City of Sacramento (2010 & 2018)



Source: U.S. Census ACS 5-Year Estimates DP05 2010 and 2018; EPS.

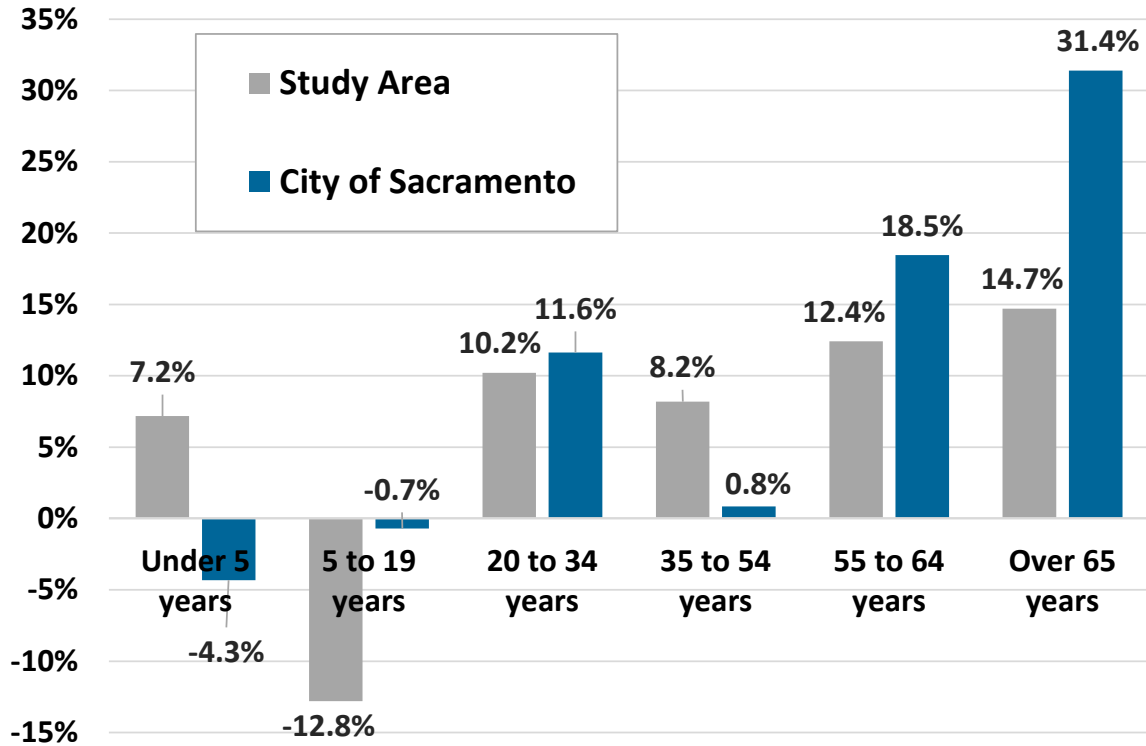
Between 2010 and 2018, both the Study Area and the City experienced large increases in residents aged 55 or older as the Baby Boomer generation ages.¹² Notably, the percentage change in residents aged 55 or older citywide was more than twice the percentage change in the Study Area. During the same timeframe, the Study Area experienced increases in children under the age of 5, in contrast to City trends, and residents between the ages of 20-34, likely as a result of Millennial generation families moving to the area, especially in the Tahoe & Colonial and Fruitridge Pocket Subareas.¹³ Both the Study Area and the City experienced a decrease in residents aged 5-19 years

¹² Baby boomers are the demographic cohort following the Silent Generation and preceding Generation X. The generation is generally defined as people born from 1946 to 1964, during the post-World War II baby boom.

¹³ Millennials, also known as Generation Y, are the demographic cohort following Generation X and preceding Generation Z. Researchers and popular media use the early 1980s as starting birth years and the mid-1990s to early 2000s as ending birth years, with 1981 to 1996 a widely accepted defining range for the generation.

and smaller increases of residents aged 35-54 years, suggesting a portion of families with older children moved out of the City. See **Figure 2-4**.

Figure 2-4. Age Range Distribution Percentage Change (2010-2018)



Source: U.S Census ACS 5-Year Estimates DP05 2010 and 2018; EPS.

Educational Attainment

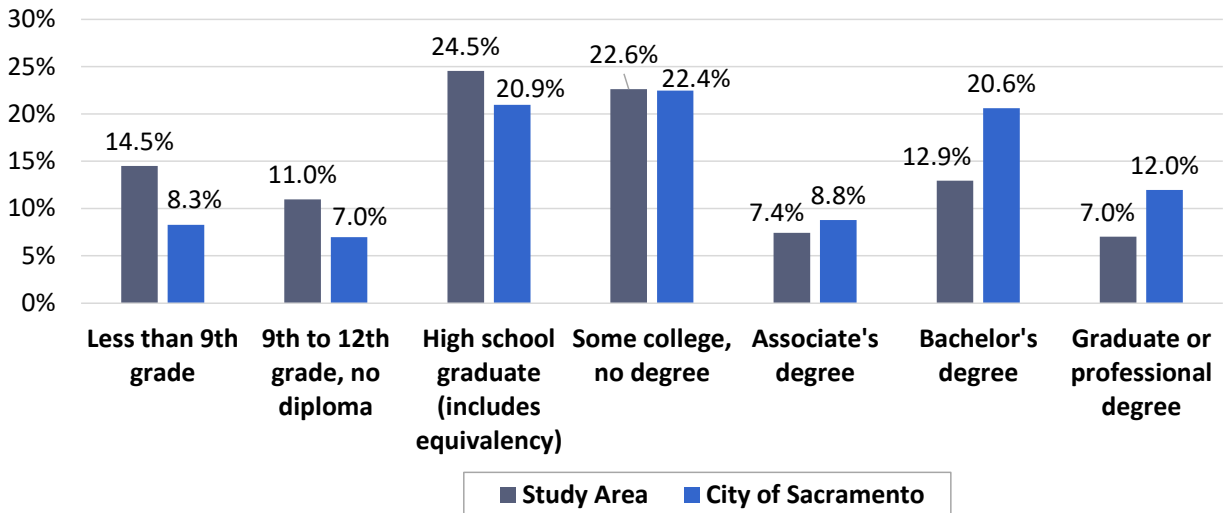
Overall, the Study Area’s population has a lower educational attainment than the City’s population. As of 2018, about 25 percent of the Study Area’s residents had not achieved a high school degree or high school equivalency, compared to about 15 percent of the population in the City. Further, about 27 percent of Study Area residents had attained an Associate’s degree or higher compared to over 40 percent of City residents.

The low level of educational attainment diverges across Subareas. As of 2018, almost 50 percent of residents in the Elmhurst Subarea held a bachelor’s degree or higher, substantially higher than the other Subareas’ proportion of the population with this level of educational attainment, which ranges from 6 percent in Lemon Hill to 29 percent in Oak Park, as well as the City’s proportion of 33 percent. Notably, the percentage of the population with a bachelor’s degree or higher in the northern portion of the Oak Park Subarea (a subset of this Subarea comprising the neighborhoods of Med Center and North Oak Park) is similar to Elmhurst’s with a jump from 29 percent in 2010 to 46

percent in 2018.¹⁴ This high level of educational attainment is likely based on Elmhurst, Med Center, and North Oak Park’s adjacency to the UC Davis Medical Center and the affluent East Sacramento neighborhood, as well as the size and quality of the housing stock in these areas. See **Figure 2-5** and **Figure 2-6**.

Although the educational attainment in the Study Area is lower than the City’s, there was a substantial shift between 2010 and 2018, with greater proportions of the Study Area’s residents possessing secondary and post-graduate education degrees. These data suggest the socioeconomic composition of the Study Area is changing. There was a 53 percent increase in residents who had attained an Associate’s degree, a 27 percent increase in residents who had attained a Bachelor’s degree, and a 66 percent increase in residents who had attained a graduate or professional degree. See **Figure 2-7**.

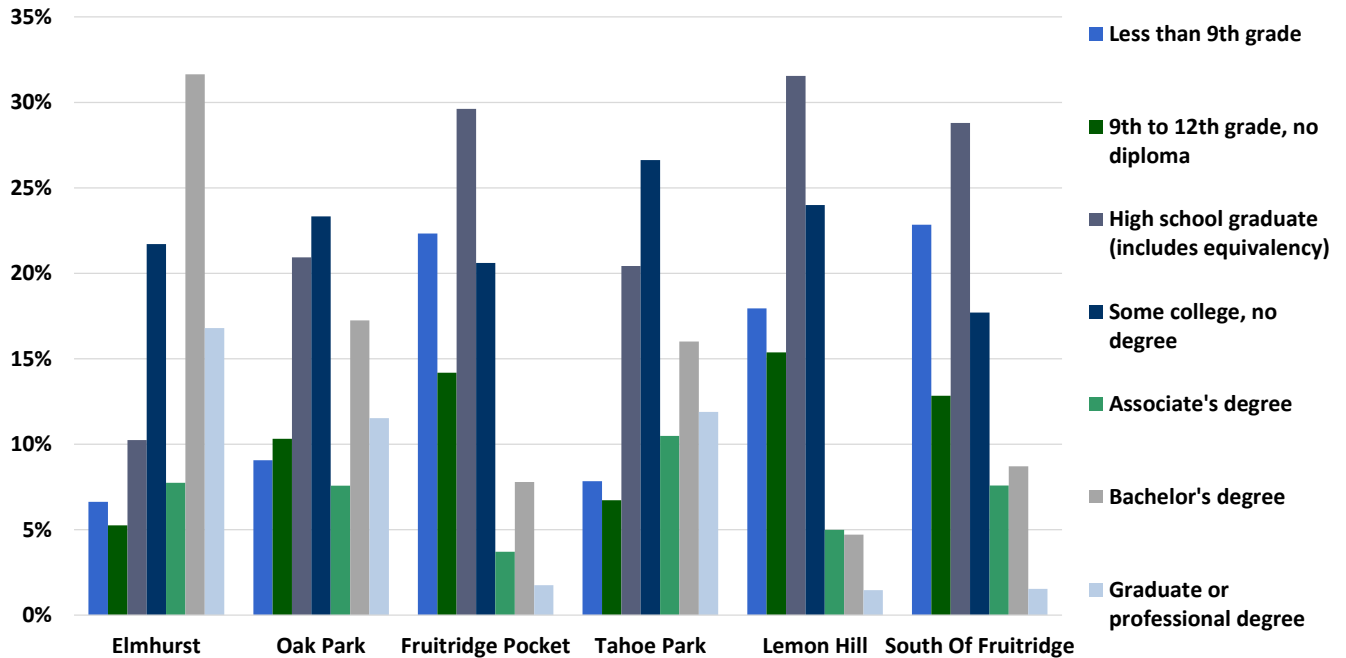
Figure 2-5. Educational Attainment Study Area and City of Sacramento for the Population Aged 25+ (2018)



Source: U.S Census ACS 5-Year Estimates S1501 2018; EPS.

¹⁴ Note that data pertaining to the North Oak Park/Med Center neighborhoods is not distinguished separately from the Oak Park Subarea in **Figure 2-5** or **Figure 2-6**. The finding detailed here is based on data contained in Census Tract 6067001800, one of several census tracts aggregated in the Oak Park Subarea.

Figure 2-6. Educational Attainment Study Subareas for the Population Aged 25+ (2018)

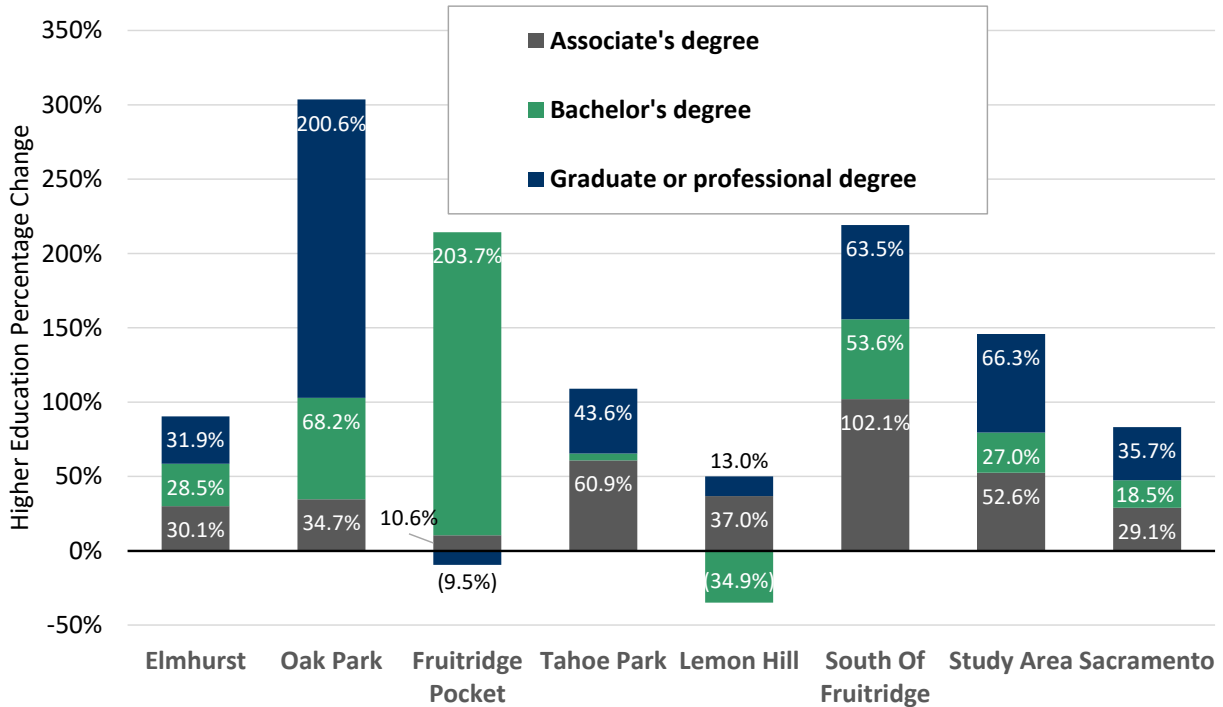


Source: U.S. Census ACS 5-Year Estimates S1501 2018; EPS.

Between 2010 and 2018, conclusions regarding educational attainment by Subarea include the following.

- In the **Oak Park Subarea**, the number of residents that had attained a bachelor's degree increased by almost 800 (almost 70 percent) and the number of residents with a graduate or professional degree increased by almost 900 (a 200 percent increase).
- The number of residents with bachelor's degrees increased in the **Fruitridge Pocket Subarea** by almost 280 (about a 200 percent increase).
- In the **Tahoe & Colonial Subarea**, the number of residents with associate's and graduate or professional degrees increased by about 500 for each degree level (61 percent and 44 percent increases, respectively).
- The **South of Fruitridge Subarea** saw increases of residents with associate's and bachelor's degrees by almost 500 (a 102 percent increase) and 400 (a 54 percent increase), respectively.

Figure 2-7. Higher Education Attainment Percentage Change for the Population Aged 25+ (2010-2018)



Source: U.S Census ACS 5-Year Estimates S1501 2010 and 2018; EPS.

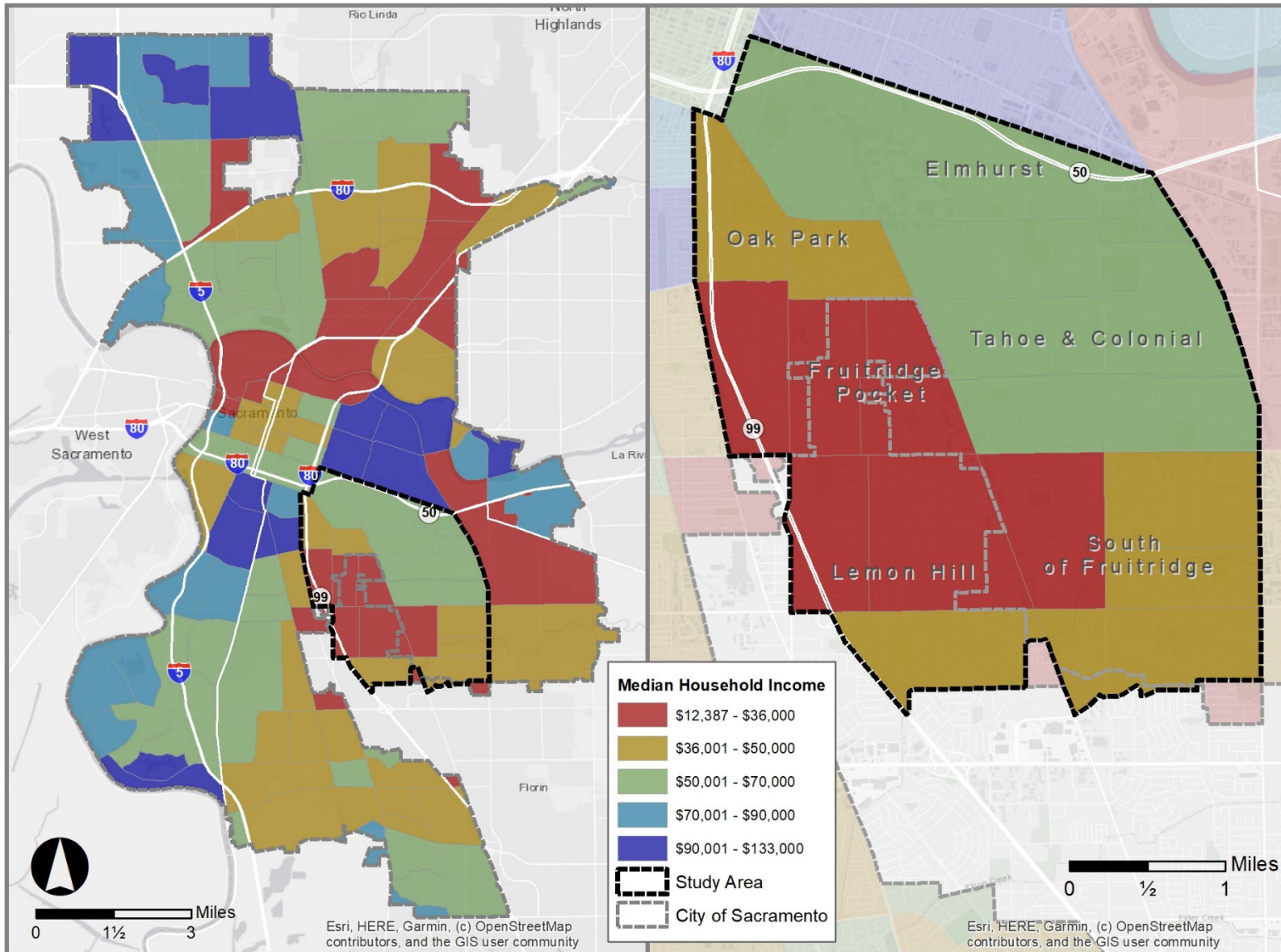
Median Household Income

Median household income in the Study Area is significantly lower compared to the median household income in the City. In 2018, the overall median household income in the Study Area was \$44,700, about 30 percent lower than the median income for the City as a whole, which was \$58,500. The distribution of household income across the Study Area is distinctive for each Subarea, as exhibited in A higher proportion of Study Area households (56 percent) earn incomes below \$49,999 compared to the City (43 percent), conversely a higher proportion of City households (39 percent) earn incomes of \$75,000 or more compared to the Study Area (26 percent). See **Figure 2-9**.

Map 2-2. The Elmhurst and Tahoe & Colonial Subareas and the northern portion of Oak Park (including Med Center and North Oak Park) both have a greater concentration of higher-earning households, with median household incomes around \$60,000, nominally surpassing the median income of the City.¹⁵ The central and southern portions of Oak Park and the Subareas of Fruitridge Pocket, Lemon Hill, and South of Fruitridge represent the two lowest median income categories within the City, with an average median income of about \$37,000.

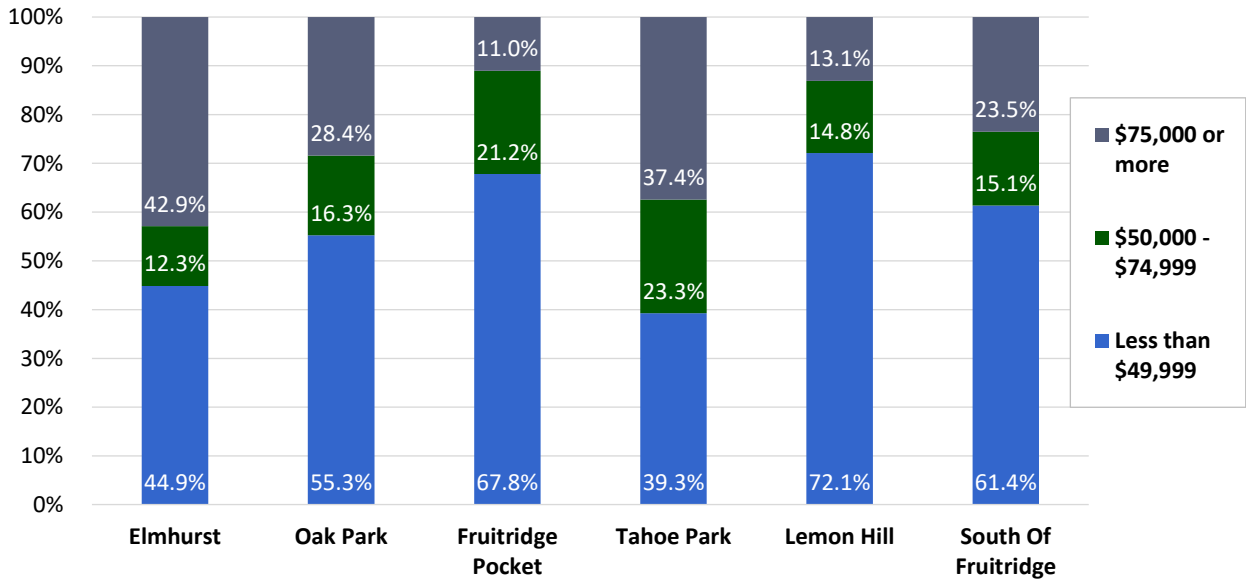
¹⁵ This data is shown by Census Tract in **Map 2-2**.

Map 2-2. Median Household Income: City of Sacramento and Study Area (2018)



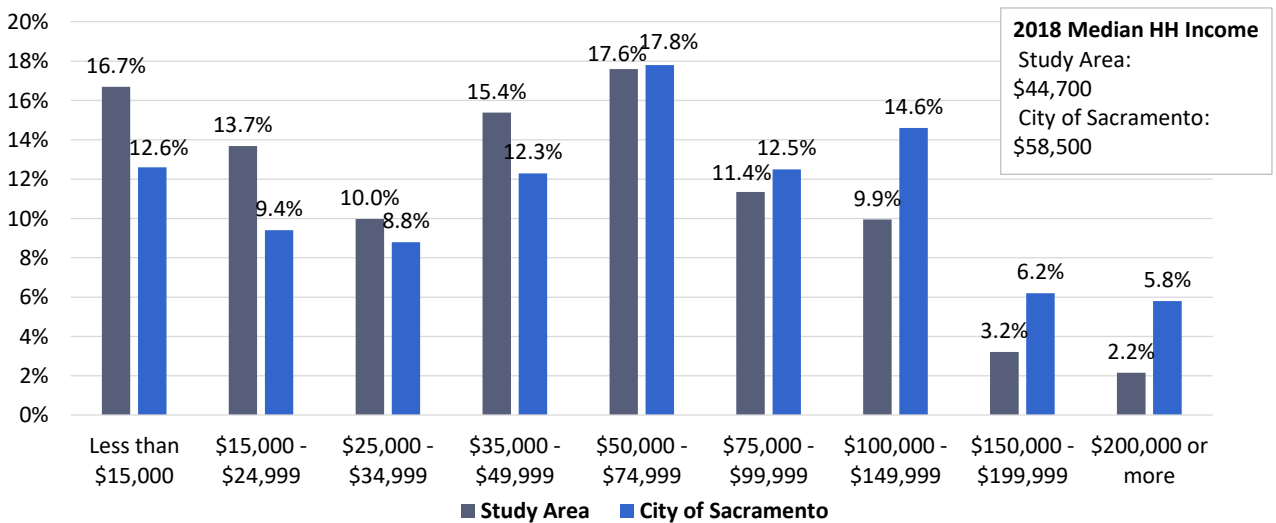
A higher proportion of Study Area households (56 percent) earn incomes below \$49,999 compared to the City (43 percent), conversely a higher proportion of City households (39 percent) earn incomes of \$75,000 or more compared to the Study Area (26 percent). See **Figure 2-9**.

Figure 2-8. Study Area Household Income Distribution (2018)



Source: U.S Census ACS 5-Year Estimates S1901 2018; EPS.

Figure 2- 9. Study Area and City of Sacramento Household Income Distribution (2018)



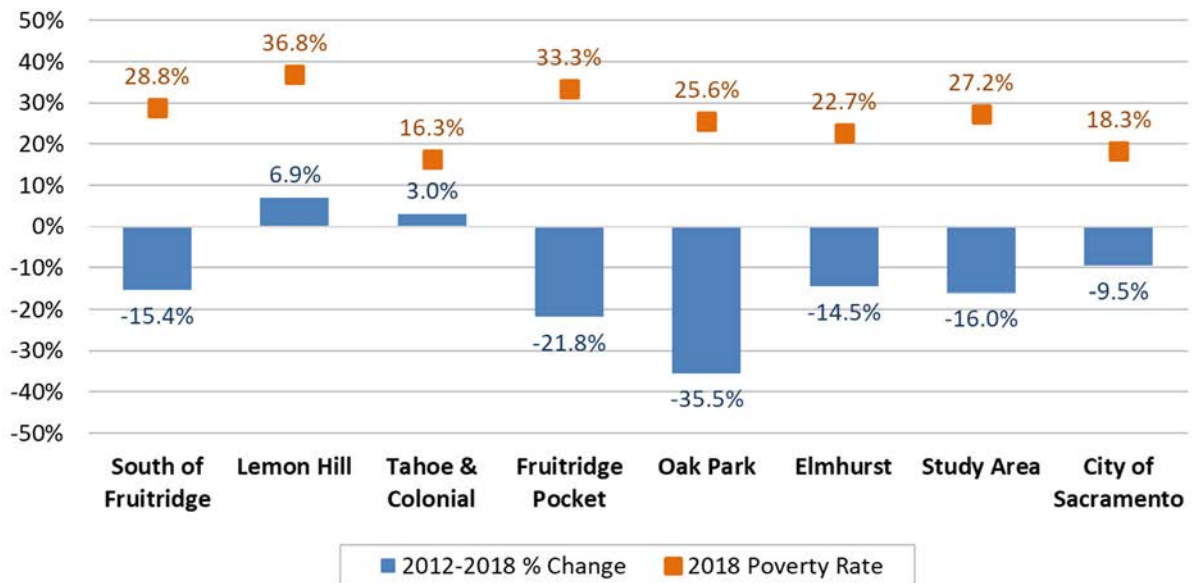
Source: U.S Census ACS 5-Year Estimates S1901 2018; EPS.

Poverty Rate

While all Subareas, except for the Tahoe & Colonial Subarea, have a poverty rate that exceeds the Citywide rate of 18.3 percent, the Study Area has experienced a declining trend between 2012 and 2018 in the percentage of residents living in poverty.¹⁶ See **Figure 2-10**. As of 2018, about 27 percent of residents in the Study Area had incomes that fell below the national poverty level, down from a poverty rate of 32.4 percent in 2012, representing a 16 percent decline.

Nearly all Subareas in the Study Area experienced declines in the percentage of residents living under the poverty level, with the greatest declines occurring in the Oak Park and Fruitridge Pocket Subareas. The percentage of residents living in poverty in the Oak Park Subarea decreased from nearly 40 percent in 2012 to slightly over 25 percent in 2018 (a 35.5 percent decrease). In the Fruitridge Pocket Subarea, the percentage decreased from 42.6 percent in 2012 to about 33 percent in 2018 (a nearly 22 percent decrease). The percentage of individuals living in poverty increased nominally in the Tahoe & Colonial Subarea, from 15.8 percent to 16.3 percent (an increase of 3 percent), and slightly more significantly in the Lemon Hill Subarea, from 34.4 percent to nearly 37 percent (an increase of about 7 percent).

Figure 2- 10. 2018 Poverty Rate and Percentage Change in Poverty (2012-2018)



Source: U.S Census ACS 5-Year Estimates S1501 2012 and 2018; EPS.

¹⁶ Refer to the Census website for information regarding how the Census measures poverty: <https://www.census.gov/topics/income-poverty/poverty/guidance/poverty-measures.html>.

Labor Force

Labor Force (Employed Residents) by Industry

As of 2018, the Study Area comprised a labor force of about 36,100 residents employed in a wide variety of industries. The top industries employing residents of the Study Area included: Health Care and Social Assistance (about 4,700 employed residents); Retail (about 4,100 employed residents); Accommodation & Food Service (about 3,500 employed residents); Construction (about 3,400 employed residents); and

The **labor force** includes all residents of an area age 16 and older who are classified as both employed and unemployed. Conceptually, the labor force level is the number of people who are either working or actively looking for work.

Public

Administration (about 3,500 employed residents). These top industries comprised approximately 45 percent of employed residents. See **Table A-1** in **Appendix A**.

Between 2010 and 2018, the Study Area saw a significant increase in its labor force across nearly all industries, with the addition of 5,726 employed residents living in the area, representing a nearly 20 percent increase, relative to a total population percentage increase of 3 percent. These data may indicate a dramatic upward shift in the labor force participation rate of Study Area residents. In contrast, the City's labor force increased by 11 percent corresponding with the City's population increase of 9 percent.

Over half of the growth between 2010 and 2018 in the Study Area's labor force occurred in five top industries, including: Construction; Retail Trade; Accommodation and Food Services; and Professional, Scientific & Technical Services. Notably, the percentage increase of employed residents in the Study Area in these top industries were significantly higher than percentage increases experienced in the City during the same period.

STUDY AREA EMPLOYED RESIDENTS BY INDUSTRY

Top Industries (2018)

Health Care and Social Assistance
Retail Trade
Accommodation & Food Service
Construction
Public Administration

Top Industry Gains (2010-2018)

Construction (+864)
Retail Trade (+843)
Accomm. and Food Services (+823)
Prof., Scientific, & Tech. Services
(+583)

Top Industry Declines (2010-2018)

Information (-181)
Utilities (-69)

Two industries – Information and Utilities - experienced a decline in the number of employed residents in the Study Area. Combined, the labor force declined by about 250 employed residents between 2010 and 2018.

Within the Study Area, the Oak Park Subarea comprised the largest increase in employed residents, adding almost 2,100 residents to the labor force, followed by the Tahoe & Colonial Subarea, adding nearly 2,000 residents to the labor force. See **Table A-2 in Appendix A**. Combined, these subareas comprised over 70 percent of the growth in the Study Area's labor force. Remaining subareas all experienced minimal to moderate growth in the number of employed residents between 2010 and 2018. Within the Study Area, there have been notable shifts in the industries of employed residents, as summarized below.

- The Study Area's largest industry of employed residents, **Health Care and Social Assistance**, experienced labor force gains in the Oak Park and Tahoe & Colonial subareas and labor force declines in the Elmhurst and Fruitridge Pocket subareas. In addition, the Oak Park subarea experienced a large increase of residents employed in the **Professional Services** industry. An increase of employed residents in these industries indicates the influence of the UC Davis Medical Center on labor force composition in the proximate Oak Park subarea.
- Gains in employed residents in the **Retail** industry were experienced across every subarea, with the largest total gains in the Oak Park and Lemon Hill subareas.
- Increases in the labor force in the **Construction** industry were concentrated in Tahoe & Colonial, Lemon Hill, and Oak Park, with nominal growth in Elmhurst and declines in the South of Fruitridge Subarea.
- Labor force increases in the **Accommodation** industry were focused in the Tahoe & Colonial, Oak Park, and Lemon Hill subareas. Elmhurst experienced labor force declines in this industry.

Employed Residents by Occupation

In 2018, the top occupations for employed residents in the Study Area were distributed over five occupations: Office and Administrative Support Occupations; Sales and Related Occupations; Food Preparation and Serving Related Occupations; Transportation and Material Moving Occupations; and Construction and Extraction. These five occupational fields represented approximately 45 percent of all employed resident occupations in the Study Area whereas, the City's top occupations for employed residents were concentrated within only two fields: Office and Administrative Support Occupations and Sales and Related Occupations. See **Table A-3 in Appendix A**.

Aligned with educational attainment findings, a majority of the occupations of employed residents in the Study Area (over 60 percent) correspond with a low level of training; about one-tenth of occupations require a medium level of training and one-quarter

STUDY AREA EMPLOYED RESIDENTS BY OCCUPATION

Top Occupations (2018)

Office & Administrative Support Occupations
Sales & Related Occupations
Food Preparation & Serving Related
Occupations

Top Occupation Gains (2010-2018)

Healthcare Support Occupations (+1,196)
Construction & Extraction Occupations
(+686)
Transportation & Material Moving
Occupations (+633)

Top Occupation Declines (2010-2018)

Office & Administrative Support Occupations
(-639)
Personal Care & Service Occupations (-453)
Building & Grounds Cleaning & Maintenance
Occupations (-447)

require a high level of training.¹⁷ In comparison, the City's labor force is shifted more towards higher educational attainment and training, with about half of occupations requiring medium to high levels of training.

The largest gain in employed resident occupations in the Study Area occurred in Healthcare Support, Construction and Extraction, and Transportation and Material Moving. Combined, these occupations accounted for 44 percent of new resident occupations added over the 2010-2018 period and the increase in these occupations maintains the prevalence of occupations that require low and medium levels of training in the Study Area. The City also experienced strong growth in the same three occupations as the Study Area, as well as in Health Diagnosing & Treating Practitioners and Other Technology Occupations, Educational Instruction and Library Occupations, and Computer and Mathematical Occupations, accounting for 94 percent of the City's increase in employed resident occupations. These additional occupations that

experienced more growth in the City compared to the Study Area all require high levels of training.

In the Study Area, the occupations which saw a combined decrease of close to 1,600 employed residents over the same period were: Office and Administrative Support Occupations; Personal Care and Service Occupations; and Building and Grounds Cleaning and Maintenance Occupations. With the exception of Building and Grounds Cleaning and

¹⁷ Levels of training by occupations are based on information provided by O*NET, a source on key characteristics of workers and occupations utilized by US Bureau of Labor Statistics. Low training level = some on-the-job training and high school-level education; Medium training level = considerable on-the-job training, vocational education, or Associate's degree; High training level = four-year degree or above plus work experience.

Maintenance Occupations, decreases in these occupations were also experienced in the City, but were proportionally more severe in the Study Area.

Within the Study Subareas, the largest growth of employed resident occupations occurred in the Oak Park Subarea in two high training level occupations including **Management Occupations** and **Educational Instruction and Library Occupations**, as well as the low training level occupation of **Healthcare Support**, altogether accounting for nearly half of the net gain in employed resident occupations in the Subarea. See **Table A-4** in **Appendix A**. A factor in the strong overall growth is a likely result from new developments on and surrounding the Broadway Corridor.

Within the Study Area, there have been notable shifts in the occupations of employed residents, as summarized below.

- The Tahoe & Colonial Subarea incurred significant growth in employed residents in **Healthcare Support** occupations with the addition of 360 employed residents (an increase of 235 percent), **Construction and Extraction** occupations with the addition of 311 employed residents (an increase of 77 percent), and **Sale and Related** occupations with the addition of 293 employed residents (an increase of 51 percent), all requiring low levels of training.
- The Elmhurst Subarea experienced declines in 13 occupational categories, with six of those decreasing to zero employment (**Community and Social Service, Health Technologists and Technicians, Healthcare Support Occupations, Firefighting, Prevention, & Other Protective Service Workers including Supervisors, Personal Care and Service, and Farming, Fishing, and Forestry** occupations). Of the Study Subareas, Elmhurst had the smallest amount of overall growth with the addition of 251 employed residents (an increase of about 11 percent). The largest growth occurred in occupations requiring high levels of training including **Educational Instruction and Library** occupations with the addition of 250 employed residents (an increase of 160 percent) and **Business and Financial** occupations with the addition of 205 employed residents (an increase of 263 percent).
- South of Fruitridge had the smallest amount of growth proportionally with the addition of 525 employed residents (an increase of 7.6 percent). This Subarea incurred the greatest declines in the Study Area in **Management** occupations with a loss of 175 resident employees (a decrease of 52 percent) and in **Construction and Extraction** occupations with a loss of 178 resident employees (a decrease of 30 percent).

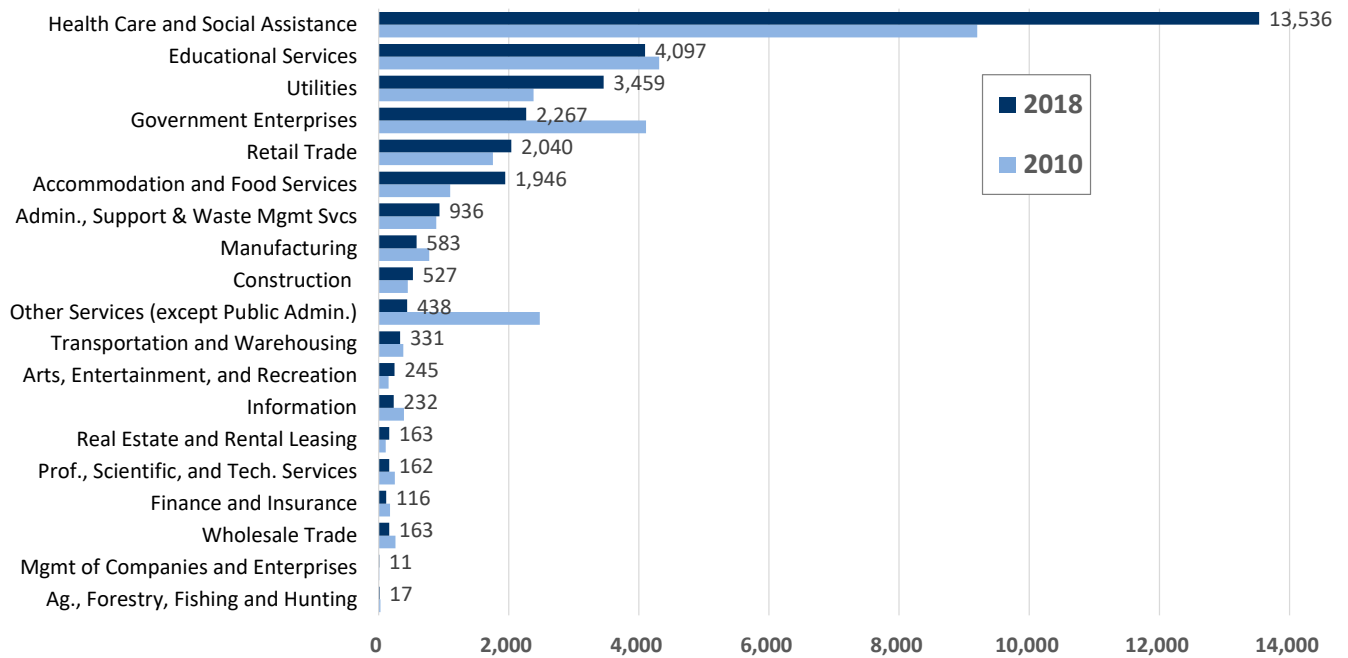
Employment

Jobs by Industry

By 2018, the Study Area contained about 31,300 jobs, with the Health Care and Social Assistance, Educational Services, and Utilities industries representing nearly 70 percent of jobs in the Study Area. During the period between 2010 and 2018, the Study Area added close to 2,600 jobs representing an increase of 7percent. See **Figure 2-11 and Appendix A Table A-5**. In comparison, the City grew by a little more than 11 percent over the same period.

Jobs refers to the number of job positions in a specified geography where a worker is employed with positive earnings. This includes part-time and full-time positions and reflects positions, not people.

Figure 2- 11. Study Area Jobs by Industry (2010 and 2018)



Source: U.S. Census OnTheMap 2018; EPS.

The Study Area saw strong growth in its most heavily concentrated industries relative to the City and County in 2018. These industries include:

- Health Care and Social Assistance.** With a total of over 13,500 jobs representing over 40 percent of all jobs, the Study Area accounted for about 25 percent of all Healthcare and Social Assistance jobs in the City and about 12 percent of all jobs in the County, based on the presence of the UC Davis Medical Center and Shriners Hospital for Children in the Elmhurst Subarea. In the Study Area, Healthcare and Social Assistance jobs increased by about 47 percent with the addition of 4,300 jobs

between 2010 and 2018, and increases in each Subarea, with the Elmhurst Subarea accounting for almost half of the total increase in Study Area Healthcare and Social Assistance jobs. See **Appendix A Table A-6**. This contrasts with the approximately 50 percent decrease in the employed residents in the Healthcare and Social Assistance industry in the Elmhurst Subarea over the 2010 to 2018 period. Although the Study Area experienced a 10 percent increase in employed residents in this industry overall (about 390 new employed residents), the increases occurred in the Oak Park, Tahoe & Colonial, Lemon Hill, and South of Fruitridge Subareas.

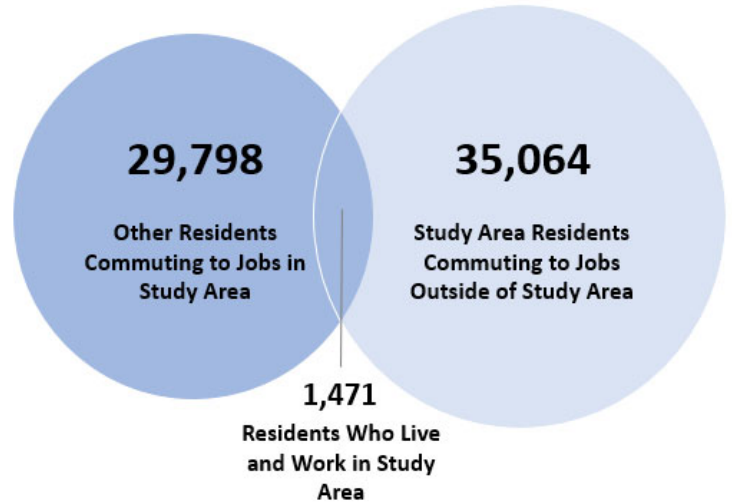
- **Educational Services.** The Study Area's second-highest concentration of jobs is in Educational Services with a total of almost 4,100 jobs, representing 13 percent of total jobs as of 2018. Educational Services jobs in the Study Area accounted for about 20 percent of all Educational Services jobs in the City and nearly 8 percent of all jobs in the County, based on the presence of the SCUSD Office located in the Lemon Hill Subarea and Pacific McGeorge School of Law in the Oak Park Subarea. Educational Services jobs saw an increase in the Lemon Hill Subarea with the addition of 82 jobs, an increase of about 4 percent. This contrasts with the over 50 percent decrease in Lemon Hill's resident employees in the Educational Services industry, although the Study Area experienced an 8 percent increase in employed residents overall (about 208 new employed residents), most of which were in the Tahoe & Colonial Subarea. While Educational Service jobs in Oak Park declined, it still represents the second largest industry in that Subarea.
- **Utilities Industry.** With about 3,500 jobs as of 2018 representing about 11 percent of total jobs, Utilities jobs in the Study Area accounted for nearly 66 percent of all Utilities jobs in the City and 54 percent of the County, given the presence of the SMUD offices, a key employer in the Study Area located in the Elmhurst Subarea. Utilities jobs in Elmhurst grew between 2010 and 2018 by 45 percent with the addition of 1,100 jobs. This contrasts with declines in employed residents in the Utilities both in the Elmhurst subarea and the Study Area overall, although the labor force in this industry has historically comprised a small share of overall labor force in the Study Area.

Jobs-Housing Balance and Commute Patterns

The Study Area possesses a balance of jobs and housing of 1.1, which falls below the commonly accepted ideal ratio of 1.5, while the City has a higher jobs-housing ratio of 1.7. See **Table 2-1** and **Figure 2-12**.¹⁸

A high proportion (96 percent) of Study Area residents commuted to jobs outside of the Study Area. Many of these residents have a short commute with 57 percent traveling fewer than 10 miles to their jobs and commuting an average of about 26 minutes, generally aligning with the average commute time for residents Citywide. Conversely, about 90 percent of Study Area workers commute in from outside of the Study Area. These employees are similarly drawn from relatively close by, with 58 percent commuting less than 10 miles.

Figure 2-12. Study Area Employment Inflow-Outflow (2018)



Source: U.S. Census OnTheMap 2018; EPS.

¹⁸ Please note that the totals presented in **Figure 2-12** and **Table 2-3** do not precisely align with employed resident and employment figures for the Study Area, as shown in **Appendix A**. The data sources, although both published by the U.S. Census, were obtained from two different sources, the ACS and OnTheMap.

Table 2-1. Commute Patterns: Study Area and City of Sacramento (2018)

Item	Study Area		City of Sacramento	
	Count	% of Total	Count	% of Total
Jobs-Housing Balance [1]	1.1		1.7	
Mean Commute Time [1]	25.8		26.2	
Resident Workers				
Residents both Living and Employed in the Study Area	1,471	4.0%	85,316	39.7%
Residents Living in the Study Area but Employed Outside (Outflow)	35,064	96.0%	129,529	60.3%
Subtotal Resident Workers	36,535	100.0%	214,845	100.0%
Employment				
Residents both Living and Employed in the Study Area	1,471	4.7%	85,316	26.8%
Workers Employed in the Study Area but Living Outside	29,798	95.3%	232,765	73.2%
Total Employment in Area (Inflow)	31,269	100.0%	318,081	100.0%
Inflow/Outflow Ratio [2]	89%		246%	

Source: U.S. Census OnTheMap 2010, 2018; U.S. Census ACS 5-Year Estimates Table S0801 2018; EPS.

[1] Jobs-Housing balance and mean commute times derived from US Census American Community Survey data as of 2018.

[2] The inflow/outflow ratio is the percentage of residents living in the specified area that travel outside of that area for work compared to the total employment for that specified area.

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3. Residential and Commercial Market Overview

Residential Market Context

For decades, California has faced a housing crisis related to its significant unhoused population and rising housing costs. For those living in poverty, high rental rates have translated into large proportions of their income allocated to housing costs, leaving little remaining for basic living expenses, let alone bolstering savings account to build wealth.¹⁹ In addition, low-income households, weighted towards Communities of Color, have faced displacement and gentrification pressure, fleeing urban core neighborhoods near transit and services, to cheaper suburban and exurban locales. Rising home sales prices have translated into larger down payment requirements leading to homeownership challenges for households with median and higher incomes.²⁰ These challenges point to a root problem of limited housing supply. Indeed, several recent reports have estimated an undersupply of housing in the State of California (State) that ranges from about 3 million to 4 million units. This undersupply represents the amount of housing that was needed over the last several decades to maintain housing costs in alignment with the rest of the country.^{21 22}

At the beginning of 2020, the Pandemic caused abrupt and severe economic impacts, including mass unemployment and major disruptions to retail and office markets, as discussed later in this chapter. The national and California housing markets declined briefly but have recovered and remained strong throughout the year, driven by historically low mortgage interest rates, the aforementioned low housing inventory, and

¹⁹ Kimberlin, Sara and Esi Hutchful, 2019. New Census Figures Show More Than 1 in 6 Californians Struggle to Afford Basic Necessities. *California Budget and Policy Center*. [online] Available at: [https://calbudgetcenter.org/resources/number-of-californians-living-in-poverty-has-been-declining-but-more-than-1-in-6-residents-still-struggle-to-afford-basic-necessities/#:~:text=Approximately%207.1%20million%20Californians%20lived,Supplemental%20Poverty%20Measure%20\(SPM\)](https://calbudgetcenter.org/resources/number-of-californians-living-in-poverty-has-been-declining-but-more-than-1-in-6-residents-still-struggle-to-afford-basic-necessities/#:~:text=Approximately%207.1%20million%20Californians%20lived,Supplemental%20Poverty%20Measure%20(SPM)) [Accessed January 2021].

²⁰ Levin, Matt, 2021. Commentary: Five things I've learned covering California's housing crisis that you should know. *Cal Matters*. [online] Available at: <https://calmatters.org/housing/2021/01/california-housing-crisis-lessons/> [Accessed January 2021].

²¹ Taylor, Mac, 2015. California's High Housing costs Causes and Consequences. *Legislative Analyst Office*. [online] Available at: <https://lao.ca.gov/reports/2015/finance/housing-costs/housing-costs.pdf> [Accessed January 2021].

²² Dillon, Liam, 2018. California lawmakers killed one of the biggest housing bills in the country. *Los Angeles Times*. [online] Available at: <https://www.latimes.com/politics/la-pol-ca-big-housing-bill-dies-20180417-story.html> [Accessed January 2021].

increased residential turnover related to changing consumer preferences following work-from-home directives for non-essential employees.

The Pandemic has accelerated Bay Area migration to the Sacramento Region, a trend that commenced during the Great Recession, as people sought to escape the high housing costs of the Bay Area for more affordable locales.²³ This migration has created increased residential demand in Sacramento, which experienced a nearly 8 percent increase in average home prices over the past year, slightly higher than the State average, and is projected to be the fastest growing housing market in the U.S. in 2021.²⁴

At the same time, the Pandemic has deepened socioeconomic inequalities across the nation. While many people have retained their jobs, increased savings and prioritized debt repayment because of economic uncertainties, and invested in a surging stock market, millions of Americans remain unemployed and face permanent job losses and housing and food insecurity.²⁵ These trends may prompt many lower-income households to leave their current place of residence in search of areas with a lower cost of living or different employment opportunities. The Pandemic has certainly elevated the need for the creation of new affordable housing opportunities, as well as assistance programs and policies, in a state already grappling with an affordable housing crisis.

Study Area Residential Market Conditions

The following section examines the characteristics and trends of residential uses in the Study Area to establish the context for accommodating future residential development.

Housing Units

As of 2020, there were a total of 32,658 housing units in the Study Area with nearly half of the Study Area's housing units located in the Tahoe & Colonial and Oak Park Subareas. See **Table 3-1**.

Characteristics of the housing stock in each Subarea are indicative of its development period, as shown in **Figure 3-1**. As one of the first neighborhoods outside of the City's urban core, the Oak Park Subarea has the oldest housing stock with close to a third of its

²³ Murphy, Katy. Bay Area residents seek the California dream – in Sacramento. The Mercury News. [online] Available at: <https://www.mercurynews.com/2017/11/18/bay-area-residents-look-for-the-california-dream-in-sacramento/> [Accessed January 2021].

²⁴ Hamann, Emily. Sacramento forecast to be NO. 1 for housing market growth in 2021. Sacramento Business Journal. [online]] Available at: <https://www.bizjournals.com/sacramento/news/2020/12/07/realtor-forecast-sacramento-2021.html> [Accessed January 2021].

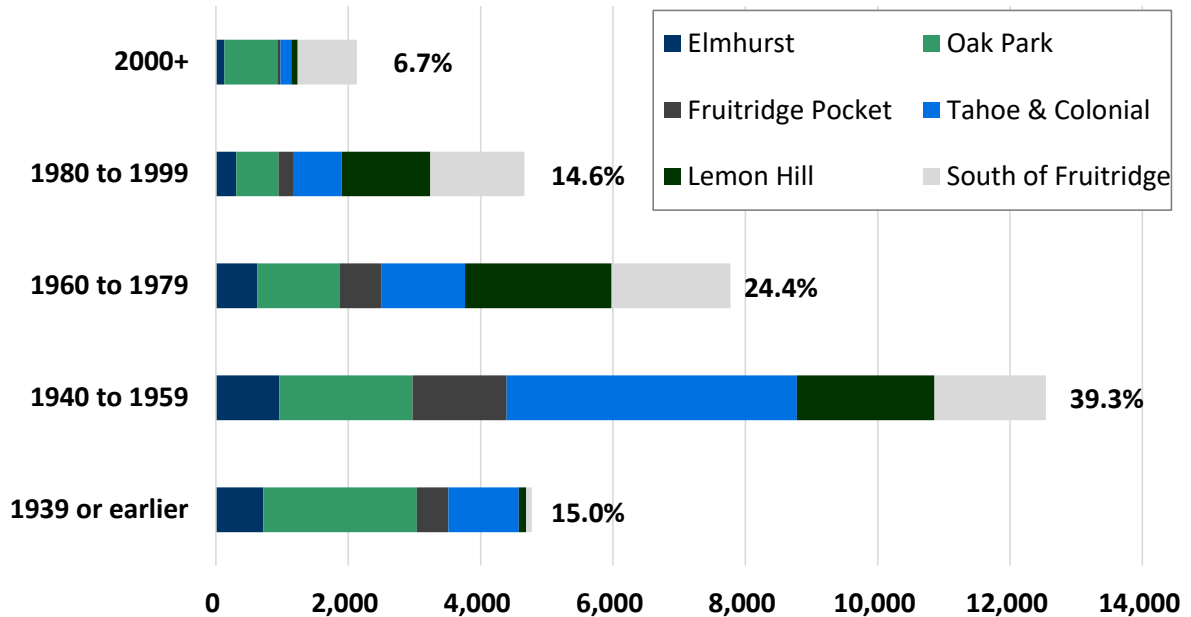
²⁵ Eisen, Ben. Covid-19 Upended Americans' Finances, Just Not in the Ways We Expected. *The Wall Street Journal*. [online] Available at: <https://www.wsj.com/articles/covid-upended-americans-finances-just-not-in-the-ways-we-expected-11609081200?mod=e2fb> [Accessed January 2021].

Table 3-1. Total Housing Units by Subarea (2000-2020)

Item	Housing Units									
	2000	2010	2020	2020 Units as % of Study Area	Change 2000-2020			Change 2010-2020		
					Total	%	Avg. Annual Change	Total	%	Avg. Annual Change
Study Subarea										
Elmhurst	2,554	2,668	3,003	9.2%	449	17.6%	22	335	12.6%	34
Oak Park	6,368	6,419	7,089	21.7%	721	11.3%	36	670	10.4%	67
Fruitridge Pocket	2,784	2,789	2,880	8.8%	96	3.4%	5	91	3.3%	9
Tahoe & Colonial	7,820	7,427	7,613	23.3%	(207)	(2.6%)	(10)	186	2.5%	19
Lemon Hill	5,802	5,819	6,037	18.5%	235	4.1%	12	218	3.7%	22
South of Fruitridge	5,421	5,929	6,036	18.5%	615	11.3%	31	107	1.8%	11
Total Study Area	30,749	31,051	32,658	100.0%	1,909	6.2%	95	1,607	5.2%	161

Source: U.S. Census Bureau, Census 2010 Summary File 1. Esri forecasts for 2020 and 2025 converted Census 2000 data into 2010 geography; EPS.

Figure 3-1. Housing Units by Year Built in the Study Area and Percentage of Total (2018)



Source: U.S. ACS 5-Year Estimates DP04 2018; EPS.

approximately 7,000 units built before 1940. The majority of the housing units in the other Subareas were built between 1940 to 1959 and very few new housing units (about 2,130 units, or 7 percent of total housing inventory) have been developed after the year 2000. Most newer housing units (units constructed after the year 2000) have been constructed in the South of Fruitridge Subarea (nearly 900 units) and Oak Park Subarea (about 800 units).

Much of the newer housing that developed in the South of Fruitridge Subarea has included both rental and ownership housing near Lemon Hill Avenue, east of Stockton Boulevard. A surge of new residential development in and near the Oak Park Subarea, commenced in 2003 with a commercial revitalization project called 40 Acres located on the southwest block of Broadway and 35th Street.²⁶ Following the project's success, and located kitty-corner to 40 acres, a local architect constructed 10 live-work lofts in 2008.²⁷ Thereafter, bolstered by continued Study Area job growth driven by the Med Center facilities and SMUD headquarters, as well as consumer preferences for living in urban locations close to employment opportunities and services, several projects with a mix of residential and commercial uses were developed in the Oak Park and Elmhurst Subareas, as summarized below.

- **Broadway Triangle** is a mixed-use redevelopment project completed in 2014 comprising 29 units, 23 of them for sale and the rest for-rent lofts, along with 10,000 square feet of retail located in the Oak Park Subarea.
- **Oak Park Creatives** is 6-unit market rate single family project located on 2nd Avenue in the Oak Park Subarea, completed in 2017.
- **The Alchemy Project** includes 9 market rate single family homes around 1,400 square feet, located in the Oak Park Subarea, completed in 2018.
- **The Grounds at Tahoe Park**, comprises 44 market rate single family homes located in the Elmhurst Subarea. The homes range in size from 1,700 – 2,500 square feet and is 95 percent sold.
- **The Gio**, completed in early 2020, is a market-rate, mixed use, "smart" project and includes 213 units, a parking garage, resident amenities including a rooftop pool and community room, and 4,300 square feet of ground floor retail. As of January 2021, this project has 91 percent occupancy. The high-end residential project is located in the Elmhurst Subarea and has primarily attracted nearby medical facility employees.

²⁶ Johnson, Hillary Louise, 2017. The Place Maker. *Sactown Magazine*. [online] Available at: <https://www.sactownmag.com/the-place-maker/> [Accessed January 2021].

²⁷ Ibid.

Housing Tenure

In 2018, the majority of the Study Area’s households were renter-occupied, with 54 percent of the area’s residents renting their homes, an increase from about 50 percent in 2010. See **Table 3-2**. The City, which has a lower percentage of renter-occupied households (48 percent) relative to the Study Area, also experienced an increase in renter-occupied households, from 45 percent in 2010 to 48 percent in 2018.

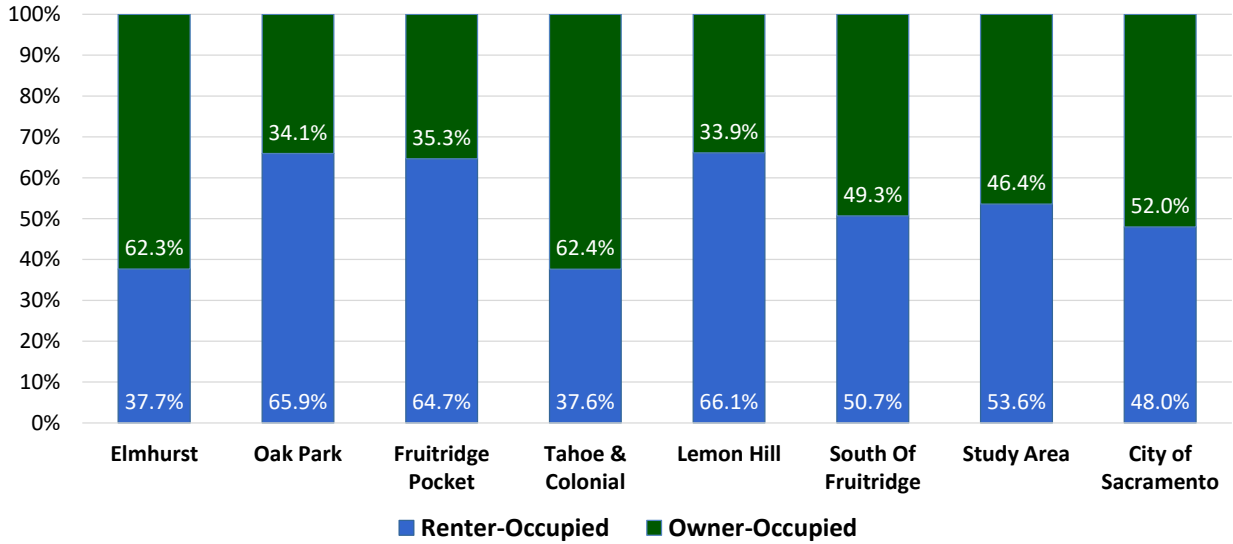
The Elmhurst and Tahoe & Colonial Subareas diverge from the Study Area’s majority of renter-occupied households, each with approximately 62 percent of their households comprising owner-occupied dwelling units. See **Figure 3-2**.

Table 3-2. Household Tenure Summary by Study Subarea (2018)

Item	Owner-Occupied Households		Renter-Occupied Households		Total Occupied Households	
	Total	% of Total	Total	% of Total	Total	% of Total in Study Area
Study Subarea						
Elmhurst	1,590	5.4%	961	3.2%	2,551	8.6%
Oak Park	2,139	7.2%	4,139	14.0%	6,278	21.2%
Fruitridge Pocket	895	3.0%	1,637	5.5%	2,532	8.5%
Tahoe & Colonial	4,547	15.3%	2,745	9.3%	7,292	24.6%
Lemon Hill	1,841	6.2%	3,590	12.1%	5,431	18.3%
South of Fruitridge	2,743	9.3%	2,817	9.5%	5,560	18.8%
Total Study Area	13,755	46.4%	15,889	53.6%	29,644	100.0%
City of Sacramento	89,283	52.0%	82,321	48.0%	171,604	100.0%

Source: U.S Census ACS 5-Year Estimates B25032 2018; EPS.

Figure 3-2. Housing Tenure Percentage: City of Sacramento and Study Area (2018)



Source: U.S. Census ACS 5-Year Estimates B25032 2018; EPS.

Units in Structure

The Study Area is characterized by a predominance of single-family dwelling units. As of 2018, nearly 80 percent of all housing units were single-family units, relative to about 67 percent in the City overall. Conversely, about 19 percent of total housing units in the Study Area were multi-unit dwellings compared with 31 percent Citywide. See

Table 3-3.

As of 2018, the Tahoe & Colonial Subarea had the largest concentration of single-unit dwellings, comprising about 95 percent of all housing in this subarea, whereas Lemon Hill's single-unit dwellings comprise about 65 percent of its housing supply (less than the Citywide average). Multi-unit dwellings are most heavily concentrated in Lemon Hill and Oak Park, comprising 33 and 27 percent of each Subarea's supply, respectively. Structures with 5+ units reflect the majority of the supply of multi-unit dwellings in all of the Subareas, similar to the characteristics of multi-unit housing throughout the City. Notably, the South of Fruitridge Subarea contains a concentration of manufactured homes, comprising nearly 9 percent of all units in this subarea.

Table 3-3. Units in Housing Structures (2018)

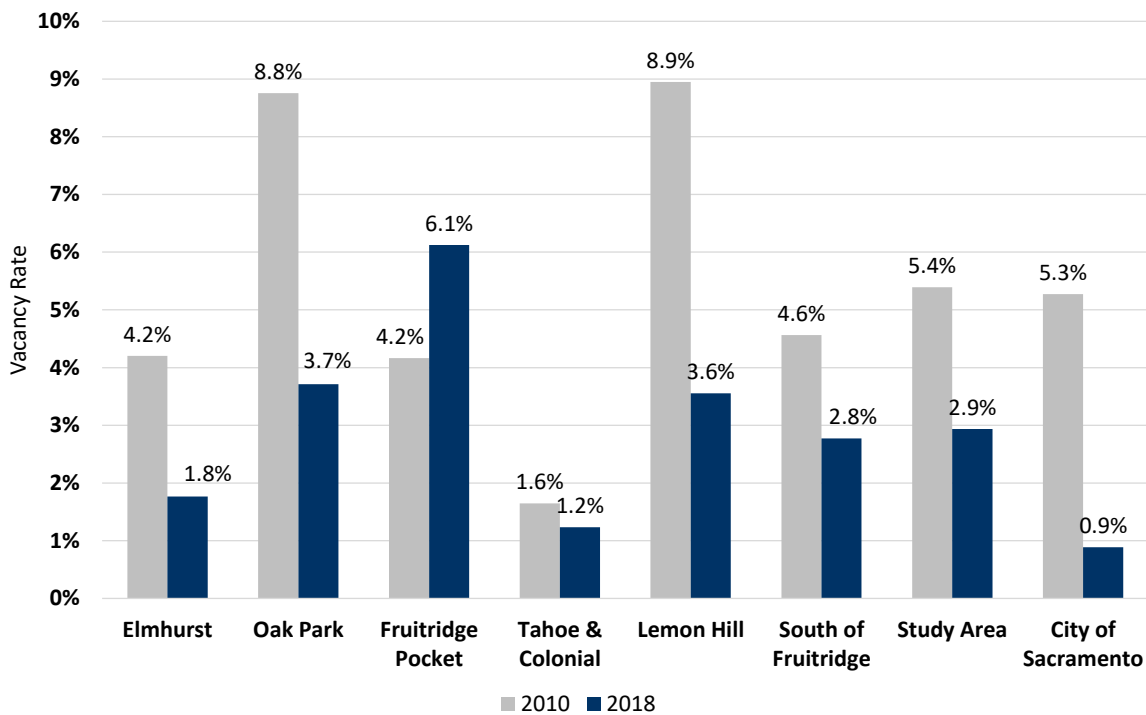
Item	Housing Units (2018)										Total
	Single Dwelling Unit		Multi-Unit Dwellings				Total		Mobile / RV		
	Total	%	Total	%	Total	%	Total	%	Total	%	
Study Subarea											
Elmhurst	2,115	77%	94	3.4%	533	19.4%	627	22.9%	0	0.0%	2,742
Oak Park	5,073	72%	574	8.2%	1,344	19.1%	1,918	27.3%	28	0.4%	7,019
Fruitridge Pocket	2,358	84%	315	11.2%	91	3.2%	406	14.5%	44	1.6%	2,808
Tahoe & Colonial	7,228	95%	196	2.6%	112	1.5%	308	4.1%	64	0.8%	7,600
Lemon Hill	3,820	65%	661	11.3%	1,280	21.9%	1,941	33.3%	72	1.2%	5,833
South of Fruitridge	4,452	76%	260	4.4%	632	10.7%	892	15.2%	538	9.1%	5,882
Study Area	25,046	79%	2,100	6.6%	3,992	12.5%	6,092	19.1%	746	2.3%	31,884
City of Sacramento	131,223	67%	14,846	7.6%	46,671	23.8%	61,517	31.4%	3,009	1.5%	195,749

Source: U.S. Census 5-Year ACS Table B25032 2010 and 2018; EPS.

Vacancy

As of 2018, the housing market in the Study Area was strong, with an overall vacancy rate of only 2.9 percent for both owner- and renter-occupied units, compared to an even stronger market Citywide, with a vacancy rate of less than 1.0 percent. See **Figure 3-3**. As expected, the owner-occupied market in the Study Area had less movement than the rental market with very little vacancy (1.8 percent), though the rental market also had a low vacancy rate of about 4 percent. Typically, a healthy residential market has enough vacancy to allow for normal movement, with an industry standard of about 5-10 percent. If an area's vacancy falls below the 5-10 percent range the market is considered tight, which can make it difficult to find available, affordable housing.

Figure 3-3. Vacancy Rate Study Subarea and City of Sacramento (2010 and 2018)



Source: U.S. Census ACS 5-Year Estimates Table B25032 2010 and 2018; EPS.

As of 2018, the Fruitridge Pocket Subarea had the highest vacancy rate with 6.1 percent vacancy in all units (based on a 7.8 percent vacancy rate in renter-occupied units and a 3.0 percent vacancy in owner-occupied units). In addition, the Fruitridge Pocket is the only Subarea that experienced an overall increase in vacancy between 2010 and 2018. All other Subareas experienced decreased vacancy rates between 2010 and 2018, with the largest decrease occurring in the Lemon Hill and Oak Park Subareas, both dropping from about 9 percent down to about 3.5 percent vacancy.

Home Value and Sales Price

In 2018, the average median value for owner-occupied households in the Study Area was \$235,640, approximately 33 percent lower than the median value for the City as a whole.²⁸ The average median home value in the Study Subareas ranged from about \$168,000 in Fruitridge Pocket to \$353,000 in Elmhurst. The Subareas of Elmhurst and Tahoe & Colonial had higher median home values and higher percentages of owner-occupied units than the rest of the Study Area, as shown in **Map 3-1**. The Oak Park Subarea also had higher median home values than the southern Subareas although the Oak Park Subarea also has a smaller supply of owner-occupied households.

In the Elmhurst, Oak Park, and South of Fruitridge Subareas, the median value of homes increased slightly between 2010 and 2018 while the remaining Subareas including Fruitridge Pocket, Tahoe & Colonial, and Lemon Hill decreased.

Based on data from the Sacramento Association of Realtors, the median sales price for the Study Subareas in 2018 was about 30 percent higher than the median value from the ACS.²⁹ As of 2018, the Study Area's median home sales price was approximately \$262,000, about 75 percent of City's median home sales price as shown in **Table 3-4**. With the exception of the Elmhurst Subarea, which had a median home sales price about 125 percent higher than the Citywide average, all Subareas had a substantially lower median home sales price ranging from \$234,500 in Fruitridge Pocket to \$307,000 in the Tahoe & Colonial Subarea. Between 2010 and 2018, median sales prices in the Study Area and the City have risen substantially over the past 8 years, with a much larger increase in the Study Area (nearly 120 percent increase) relative to the City (85 percent increase).

The percentage change for average household income between the same time period is grossly mismatched with the increases in sales prices in both the Study Area and the City. Median home sale prices in the Study Area surpassed the growth of median household incomes in every Subarea, with greater disparities of growth in the Tahoe & Colonial, Oak Park, and Fruitridge Pocket Subareas. The Tahoe & Colonial and Oak Park Subareas experienced the greatest amount of growth, with median sales prices rising by 242 percent and 219 percent, respectively. The Elmhurst Subarea experienced the lowest growth increase, although still substantial at a nearly 95 percent increase, which exceeded Citywide median sales growth.

²⁸ The median value per the ACS is based on the respondent's estimate of how much the property would sell for if it were for sale and the price asked for the property if vacant.

²⁹ Actual home sale prices per the Sacramento Association of Realtors.

Table 3-4. Median Home Sales Prices (2010 in 2010\$ and 2018 in 2018\$)

Item	Zip Code(s) [1]	Median Home Sales Price			Median Household Income % Change 2010-2018 [3]
		2010 in 2010\$	2018 in 2018\$ [2]	% Change	
Study Subarea					
Elmhurst	95817, 95819	\$222,000	\$431,500	94.4%	39.8%
Oak Park	95817, 95820	\$87,500	\$278,700	218.5%	27.4%
Fruitridge Pocket	95820	\$90,000	\$234,500	160.6%	18.1%
Tahoe & Colonial	95820	\$90,000	\$307,900	242.1%	20.8%
Lemon Hill	95824, 95823	\$110,000	\$230,000	109.1%	11.3%
South of Fruitridge	95824, 95828	\$117,000	\$251,000	114.5%	19.7%
Study Area		\$119,417	\$262,000	119.4%	23.6%
City of Sacramento		\$186,916	\$345,000	84.6%	16.3%

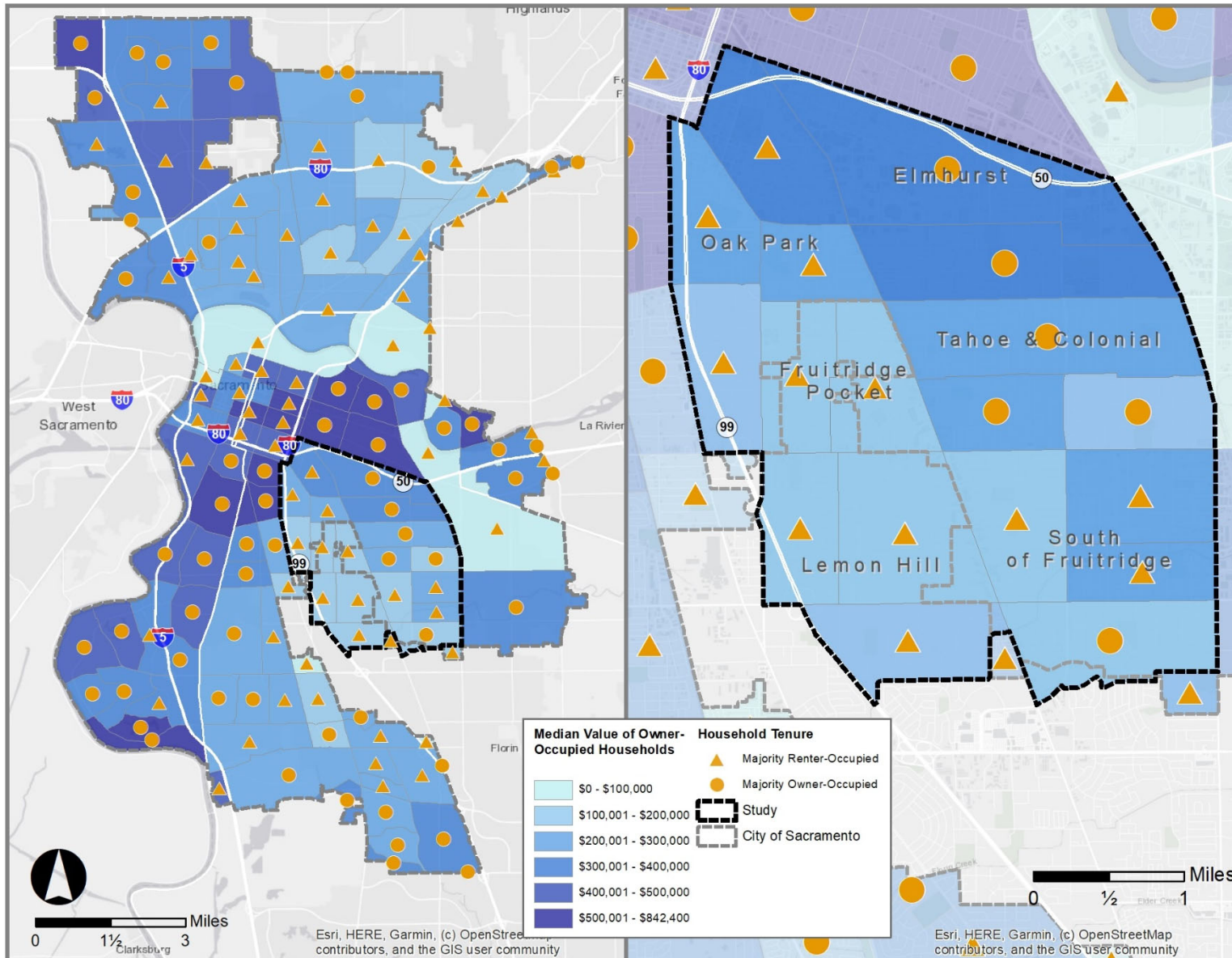
Source: Sacramento Association of Realtors; U.S. Census ACS Table S1903 2010 and 2018; EPS.

[1] Sales data for 2010 by Census Tract was not accessible, EPS estimated median sales based on the median sales for the listed zip codes.

[2] Sales data for 2018 were available by Census Tract.

[3] Median household income derived from the US Census and reflects nominal dollars (not adjusted for inflation).

Map 3-1. Median Housing Value: Owner-Occupied Household and Housing Tenure Majority: City of Sacramento and Study Area (2018)



Residential Rental Rates

Average residential rental rates between 2010 and 2018 in the Study Area increased at a slower rate than in the City as a whole. Study Area rent increased 21 percent to \$1,041 per month compared to the City's 39 percent surge and average rent of \$1,211 per month. See **Table 3-5**. The Lemon Hill and Elmhurst Subareas experienced the largest rent increases within the Study Area with rents rising 29 percent and 23 percent, respectively (with average monthly rental rates of \$860 and \$1,092, respectively). As of 2018, the highest average rent in the Study Area occurred in the Elmhurst Subarea (\$1,092 per month), although average rent was about 11 percent lower than average rent citywide. See **2** for average rents in the Study Area. The lowest average rent occurred in the Oak Park Subarea, reflecting a rate about 58 percent lower than the City's average rent.

Comparing **Map 3-1** and **Map 3-2**, the Subareas with a majority of owner-occupied dwelling units tend to have the highest average rents, including the Elmhurst and Tahoe & Colonial Subareas. These areas also have a lower percentage of multi-unit dwellings within their housing supply.

With the exception of findings for the Lemon Hill Subarea, median household incomes in the Study Area are keeping pace with median residential rental rates. See **Table 3-5**. Rental rates in the Study Area increased 21 percent, while median household incomes grew by almost 24 percent. In comparison, residential rental rates Citywide increased by nearly 40 percent and median household income increased by only 16 percent. The Elmhurst, Oak Park, and South of Fruitridge Subareas experienced the largest income growth with median incomes surpassing rent growth by 13 to 17 percent, Tahoe & Colonial was smaller with a difference of 9 percent, where Fruitridge Pocket's increase in rent and income equaled out, and Lemon Hill's rent increase outpaced income.

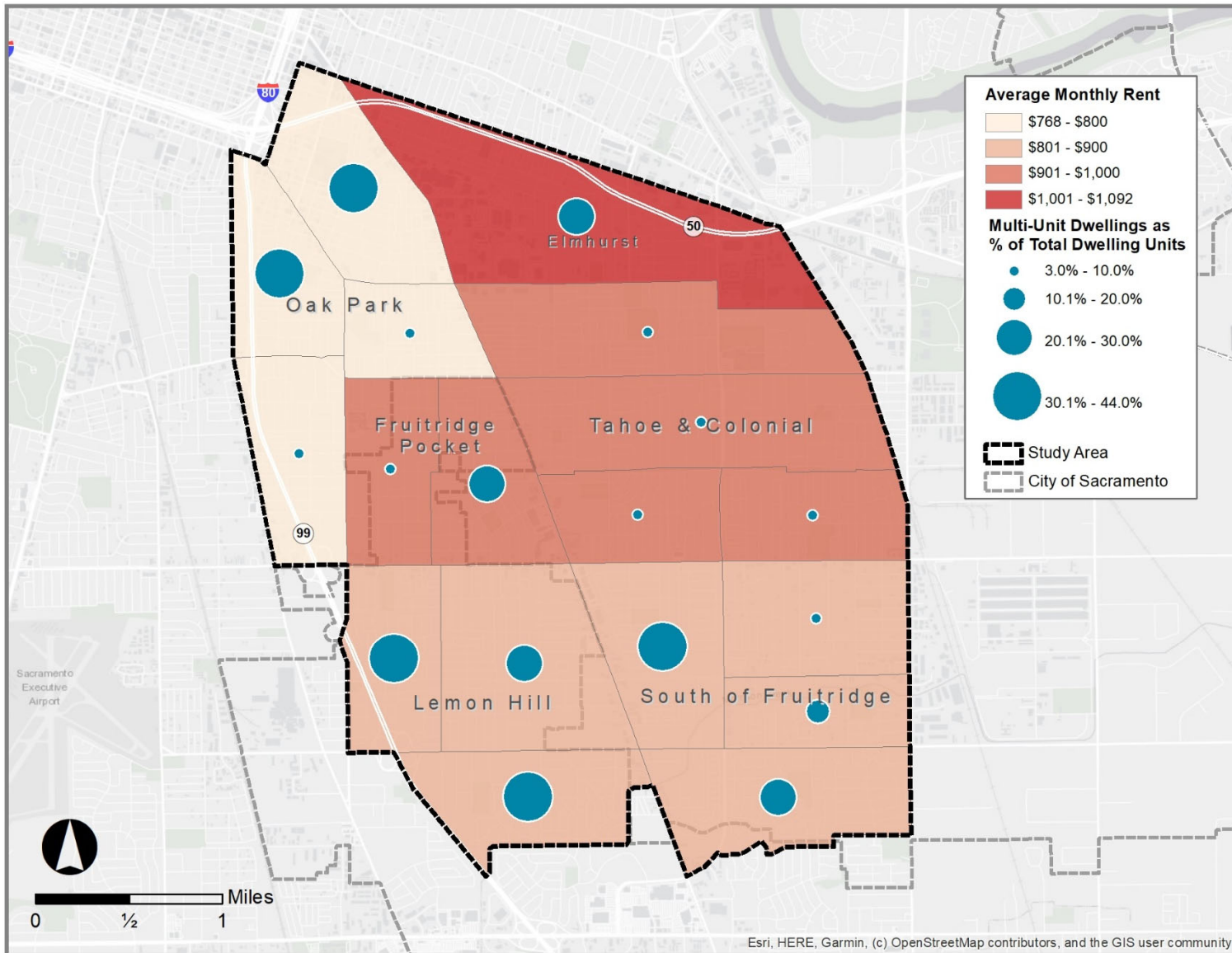
Table 3-5. Median Rent Prices (2010 in 2010\$ and 2018 in 2018\$)

Item	Median Rent			Median Household Income % Change 2010-2018 [1]
	2010 in 2010\$	2018 in 2018\$	% Change	
Study Subarea				
Elmhurst	\$888	\$1,092	23.0%	39.8%
Oak Park	\$673	\$768	14.1%	27.4%
Fruitridge Pocket	\$799	\$944	18.1%	18.1%
Tahoe & Colonial	\$832	\$929	11.7%	20.8%
Lemon Hill	\$665	\$860	29.3%	11.3%
South of Fruitridge	\$794	\$824	3.8%	19.7%
Study Area	\$861	\$1,041	20.9%	23.6%
City of Sacramento	\$873	\$1,211	38.7%	16.3%

Source: CoStar; U.S. Census ACS Table S1903 2010 and 2018; EPS.

[1] Median household income derived from the US Census and reflects nominal dollars (not adjusted for inflation).

Map 3-2. Average Monthly Rent and Multi-Unit Dwellings as a Percentage of Total Dwelling Units: Study Area (2018)



Commercial Market Context

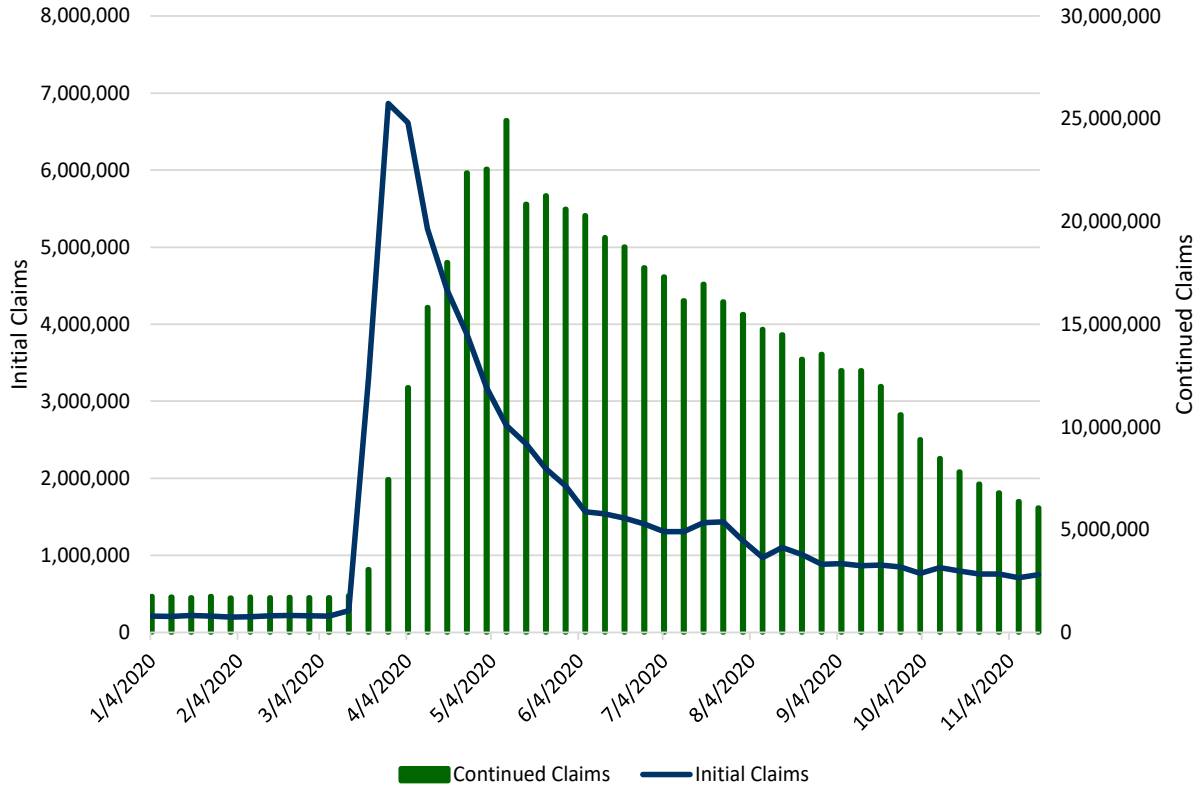
As we prepare this analysis, the Pandemic has altered the business-as-usual model, with surges in unemployment, structural changes in spending activity, and increased uncertainty and stresses for businesses and communities. Nationwide, unemployment abruptly reached Depression Era levels in the early stages of the pandemic, see **Figure 3-4**. Though unemployment claims decreased after initial public health orders to limit the spread through stay-at-home orders, the quantity of continued claims remains higher than before the onset of the pandemic.

According to the Brookings Institute, the industries that are at highest risk from the Pandemic are retail, transportation, employment services, and leisure and hospitality.³⁰ Assessing job industries by percentage in the City of Sacramento as of 2018, nearly 20 percent of jobs in the City of Sacramento are at the highest risk, as shown below in **Figure 3-5**, with 11 percent of jobs at risk in both Retail Trade and Accommodation and Food Services industries and 2 percent of jobs in the Transportation and Warehousing and Arts, Entertainment, and Recreation industries. Bearing that in mind, there is no single industry that has been completely unaffected by the Pandemic.

The advent of numerous medical treatments to mitigate the impacts of the Pandemic are currently in motion, although the timeline for treatment administration, and thus, the length and severity of the pandemic, is still unknown. Given the uncertain timeline, the specific longer-term economic implications will depend on how the crisis and future fiscal response continues to unfold. The economic impacts may result in permanent shifts in the commercial sectors or may dissipate over the long-term. Additional context regarding specific commercial sectors is provided in the following sections.

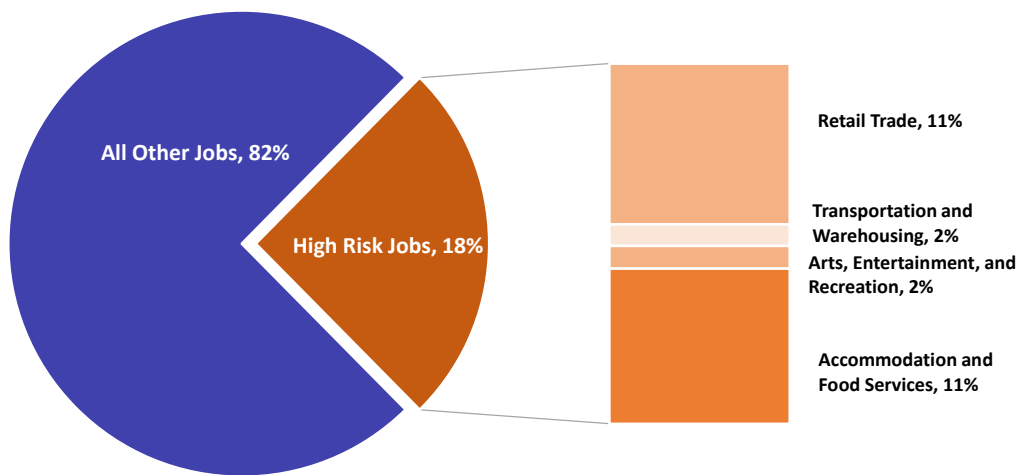
³⁰ Muro, Mark, Robert Maxim, and Jacob Whiton, 2020. The places a COVID-19 recession will likely hit hardest. *The Brookings Institute*. [online] Available at: <https://www.brookings.edu/blog/the-avenue/2020/03/17/the-places-a-covid-19-recession-will-likely-hit-hardest/> [Accessed November 2020].

Figure 3-4. U.S. Unemployment Claims



Source: Federal Reserve Bank of St. Louis; EPS.

Figure 3-5. City of Sacramento Highest At-Risk Jobs by Industry (2018)



Source: U.S. Census OnTheMap 2018; EPS.

Retail

Beginning in 2009, the economic downturn, which spread across national and global markets, had a significant effect on the retail sector. At the national level, the combination of increased unemployment rates, reduced consumer credit, and an oversupply of retail space resulted in bankruptcies, store closures, and consolidations among a wide range of formerly successful retail chains that has continued through 2020.

Despite the volume of store closures, however, the dollar amount of retail spending continues to grow steadily, with the sector averaging about 5 percent growth in sales annually since 2010.³¹ At the same time, leading retail industry trends are impacting the size of brick-and-mortar retail space and reducing demand for new retail space nationally and locally. These trends include:

- The influx of online shopping (e-commerce);
- A change in spending patterns in the retail landscape, with consumers shifting from purchasing material items to spending more on experiential retail, such as restaurants, grooming services, and health and wellness services;³² and,
- A shift in consumer preferences for retail center types from large, enclosed malls to “lifestyle centers,” mixed-use buildings in urban settings, and “main streets.”³³

Overall, retail uses may experience potentially long-lasting effects of the Pandemic. The decline of brick-and-mortar retail has been accelerated by the current circumstances and demand for the most successful retail developments of the past decade, which have focused on providing experiential uses, have been impacted as a result of shelter in place orders. As consumers spend less and save more, demand for retail experiences as well as certain goods and services may decline in the short term. However, as medical treatments advance and restrictions are lifted, consumers will likely have pent-up demand for the retail formats that have been restricted (namely, food and beverage and entertainment). And, with its ethos of adaptation, the retail sector will likely innovate with new retail concepts and formats as it adapts to the Pandemic’s lingering impacts.

Office

In 2019, the national office real estate market exhibited a full recovery from the Great Recession, with its lowest post-recession vacancy rate, which actually fell below the 20-year vacancy rate average, and rental rates were increasingly strong.³⁴ The onset of the

³¹ U.S. Total Retail Sales (1999-2020). *The Census Bureau of the Department of Commerce*. [online] Available at: <https://www.marketplacepulse.com/stats/us-ecommerce/us-total-retail-sales-113> [Accessed January 2021].

³² Chen, Oliver, John Kernan and John Blackledge, 2017. Retail’s Disruption Yields Opportunities—Store Wars! *Cowen and Company*. [online] Available at: <https://www.cowen.com/insights/retaildisruption/> [Accessed December 2017].

³³ Ibid.

³⁴ ULI Real Estate Economic Forecast, November 2020.

Pandemic at the beginning of 2020 drastically altered work routines with approximately 42 percent of the U.S. labor force now working from home.³⁵ The effects of the Pandemic on the office market have not fully apparent since most office leases are multi-year contracts, though the long-term impacts to occupancy will gradually emerge.

The effects of the Pandemic also present challenges to potential opportunities for office development. Demand for office space may be reduced by the emergence of more viable remote working arrangements for many office workers. In addition, new office construction with improved technology for health safety may be advantaged over existing building stock with less of an ability to adapt.

Medical Office

With an aging population, over the past five years medical office has been booming on a national level with trends pointing to a shift from hospital visits to outpatient uses. Healthcare providers are focusing on integrated services in a campus setting. During the Pandemic there has been an increase in virtual doctor appointments, though it is difficult to predict whether this trend will be permanent. Like office space, improvements in building design and technology are expected to emerge as best practices are established to limit the spread of infectious disease.

Study Area Commercial Market Conditions

The following section examines the characteristics and trends of commercial uses in the Study Area to establish the context for accommodating future commercial development.³⁶

Retail

Historically, the retail market in the Study Area has performed slightly below the Citywide average, with slightly higher vacancy rates and consistently lower monthly lease rates. As of 2020, the Study Area's nearly 2.7 million square feet of retail supply comprises about 7 percent of all retail square footage in the City, and its 378 retail buildings comprise about 10 percent of the City's total building inventory. See **Figure 3-6** and **Figure 3-7**.

Between 2010 and 2020, the total retail square footage in the Study Area decreased by about 5,000 square feet with negative net absorption of about 3,000 square feet, indicating a minimal change in demand for retail space, despite the Study Area's population growth during this period. During the same time frame vacancy rates

³⁵ Wong, May, 2020. Stanford research provides a snapshot of a new working-from-home economy. *Stanford News*. [online] Available at <https://news.stanford.edu/2020/06/29/snapshot-new-working-home-economy/> [Accessed November 2020].

³⁶ CoStar data relies on information from brokers and other real estate entities and may contain data inconsistencies. Note that all CoStar data reflects trends in both the Study Area and Plan Area, which do not align because the Study Area uses Census Tract boundaries whereas the Plan Area uses parcel boundaries.

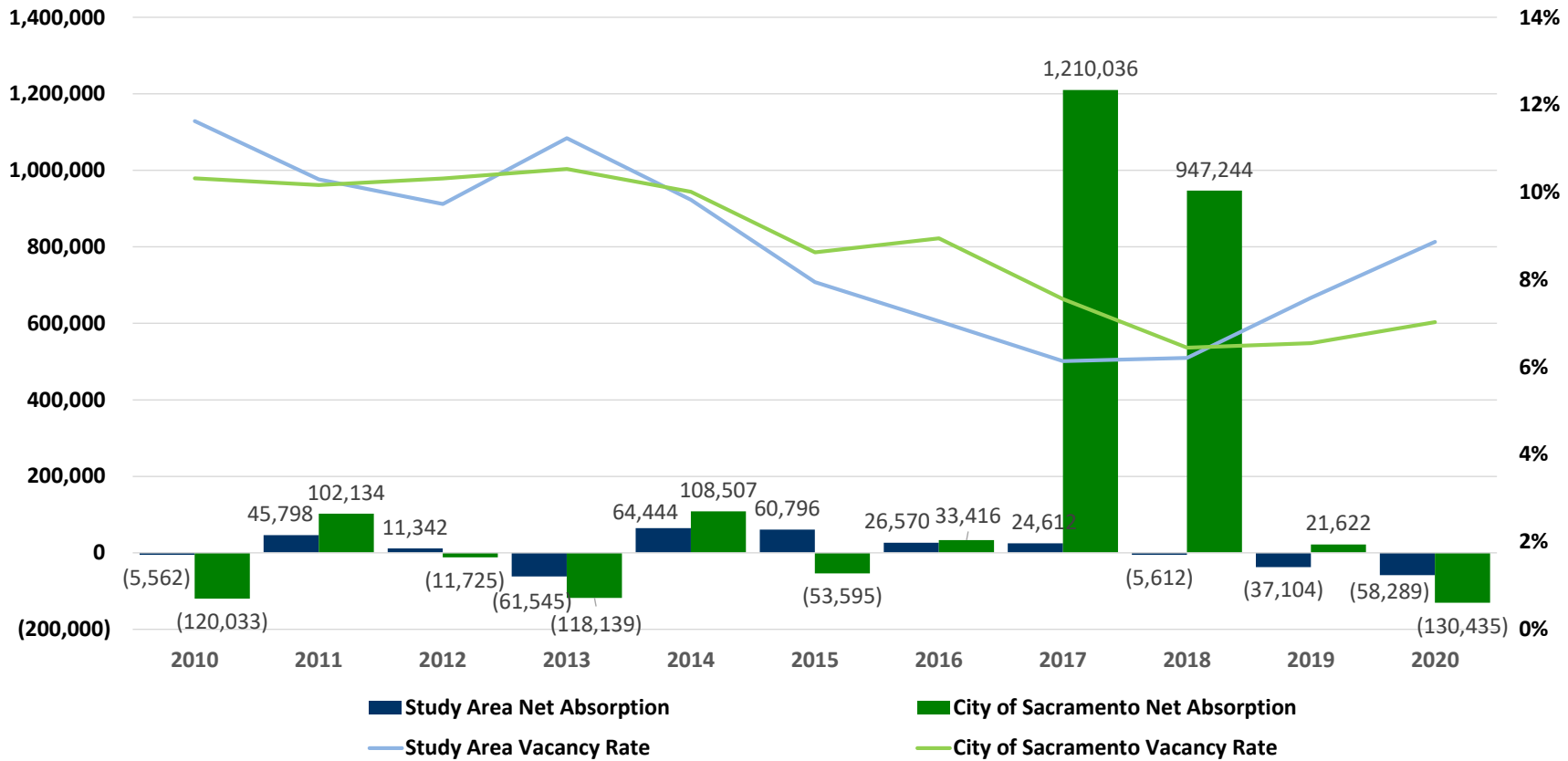
decreased in the Study Area from 12 percent to 9 percent, but remain higher than the City's vacancy rate, which decreased from 10 percent down to 7 percent. Average monthly lease rates (NNN) in the Study Area remained constant over this period with an average of about \$1.22 per square foot.³⁷ As of 2020 the lease rates achieved for retail in the Study Area are about 16 percent less than the rates secured in the City.

Recent retail investment and activity in the Study Area include the following:

- Redevelopment of the north end of the Fruitridge Shopping Center located at the southeast corner of Stockton Boulevard and Fruitridge Road in the **South of Fruitridge Subarea**, includes development of a new 15,000-square-foot CVS Pharmacy, a 2,200-square-foot Starbucks with a drive-thru, and an additional 13,868-square-foot multi-tenant retail building. This project is estimated to be completed in 2021.
- Originally anchored by a now shuttered, K-Mart, Stockton Plaza, located in the **Fruitridge Pocket Subarea**, has slowly been refilling and redeveloping with the addition of a 22,000-square-foot Planet Fitness in 2015, a 20,000-square-foot Smart & Final in 2019, and other smaller retail shops. The addition of 26,000-square-foot Ross Dress for Less and a Dutch Bros. Coffee kiosk are planned for the center, timing is unknown.
- The Food Source discount grocery store located on the northwest corner of Stockton Boulevard and Broadway in the **Oak Park Subarea** shuttered in March 2020.
- The Broadway corridor in the **Oak Park Subarea** has experienced a number of small retail and restaurant additions and changes since the onset of many redevelopment projects over the past, almost 20 year, including the 40 Acres project, home to Old Soul, Fixin's Soul Kitchen, the Guild Theater, Underground Books, and a barber shop, and the Broadway Triangle District, a project that applied adaptive reuse to buildings on 5 block corners in to achieve a mix of retail and housing, including residential units called Triangle East and West, the Plant Foundry, the Pedroni Building retail strip, and myriad retail spaces in rehabbed flat iron buildings. Recent additions include Slim & Husky's Pizza Beeria, Oak Park Brewing Co., Strapping Gift Shop, Faria Bakery, and A Community for Peace social justice crisis center, many of which are either black- or woman-owned/run.

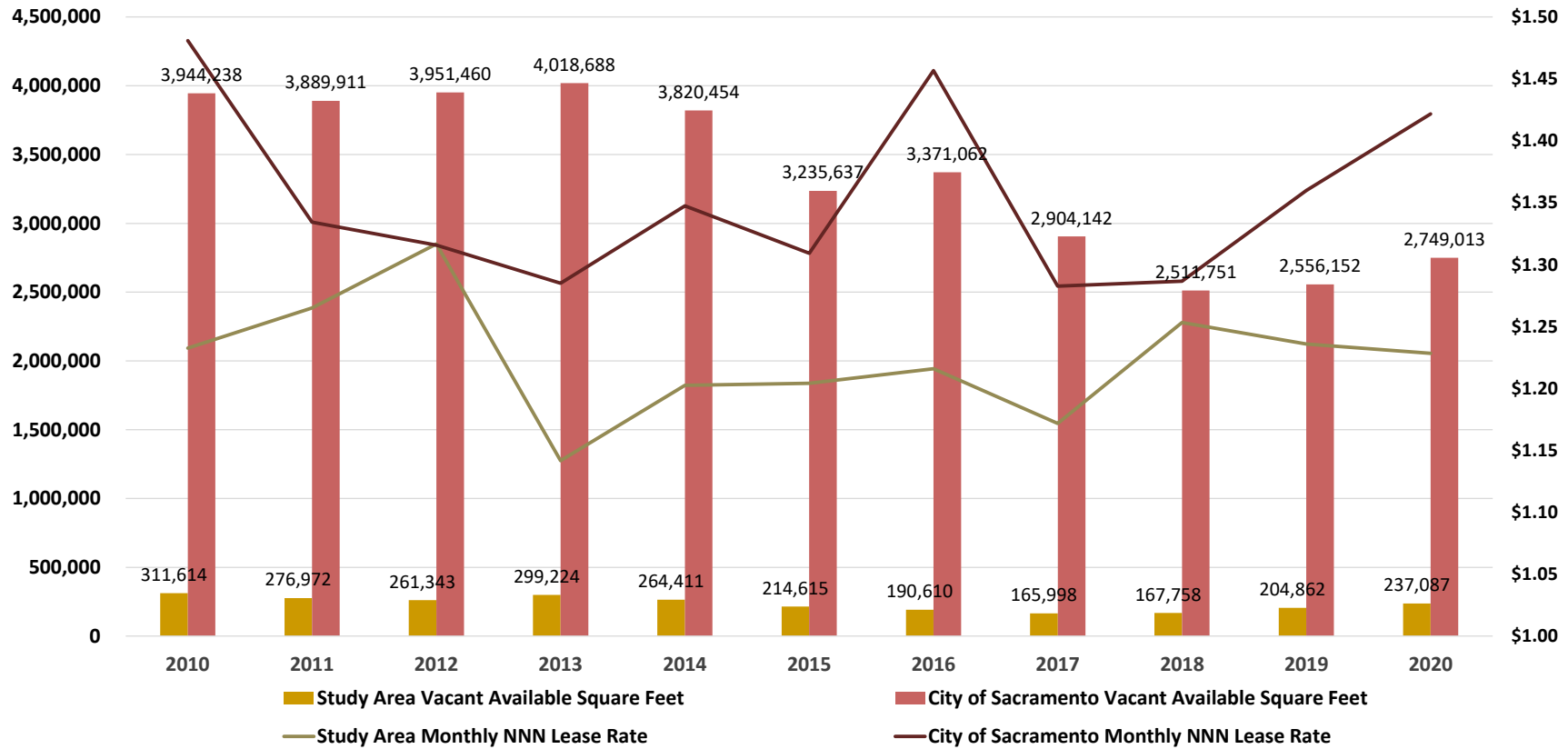
³⁷ CoStar lease rates are in current year dollars. NNN = Triple Net Rents, which means the tenant is required to pay property taxes, insurance, and maintenance in addition to their rent.

Figure 3-6. Retail Net Absorption and Vacancy Rate Trends: Study Area and City of Sacramento (2010-2020)



Source: CoStar; EPS.

Figure 3-7. Retail Total Vacant Inventory and Lease Rate Trends: Study Area and City of Sacramento (2010-2020)



Source: CoStar; EPS.

Office

With a predominance of residential, medical, and retail space, the Study Area does not play a strong role in the City's office market. The Study Area currently contains about 1.6 million square feet of space, representing about 3 percent of the City's total office square footage, and comprising older and relatively small office buildings. The Study Area's office inventory has an average year built or renovation of 1969 and an average size of 21,500 square feet per building.

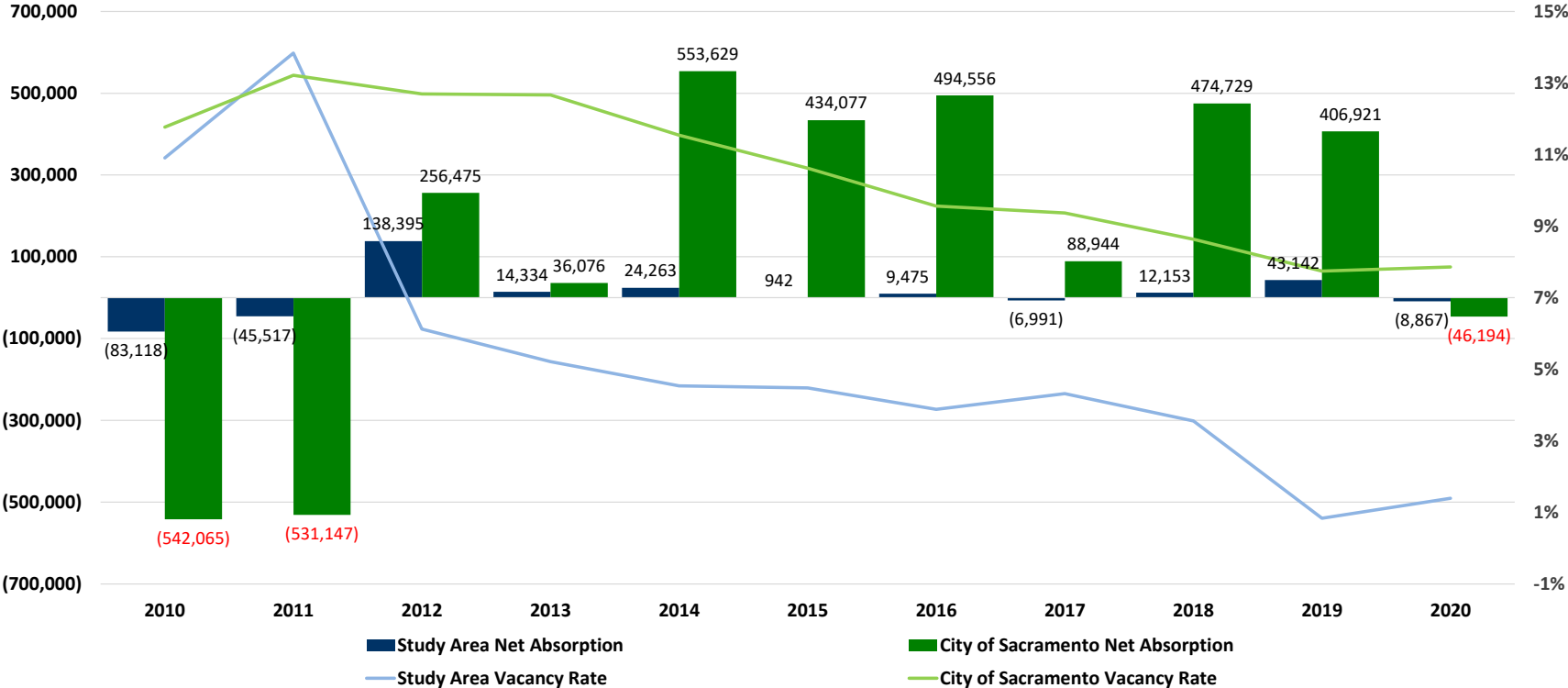
Office space inventory in both the Study Area and City increased slightly between 2010 and 2020, with the addition of 3 buildings in the Study Area totaling 34,100 square feet and 13 in the City totaling 451,300 square feet. Consistent with the type of office inventory in the Study Area, recent inventory additions include two buildings, both under 8,000 square feet located on the southeast corner of Stockton Blvd and 48th Ave. and a small 1,800-square foot office space in the new apartment building, The Gio. Vacancy rates in the Study Area dropped sharply from 11 percent to a little more than 1 percent over the 2010 to 2020 period, while the City's vacancy rate decreased at a less drastic rate from 12 percent to 8 percent. Despite the decline in vacancy, the Study Area experienced negative net absorption of about 91,400 square feet, indicating a greater amount of space was vacated or placed on the market than leased up and that net demand for office space has declined relative to supply in the Study Area. See **Figure 3-8** and **Figure 3-9**.

A 67,500-square-foot mixed use building located at 6760-6820 Stockton Boulevard was constructed on speculation in 2006 has never been occupied and remains completely vacant. The 4.5-acre project with potential for retail, office, medical, educational, or corporate uses is listed for sale with an additional 8.5 acres of land ready for construction.

Further indicating weak demand for office space in the Study Area, monthly lease rates decreased by about 29 percent in the Study Area down to \$1.02 per square foot per month between 2010 and 2018.³⁹ In contrast, the City saw office rents rise about 16 percent, commanding average lease rates (about \$2.16 per square foot per month) that are more than double asking rates in the Study Area.

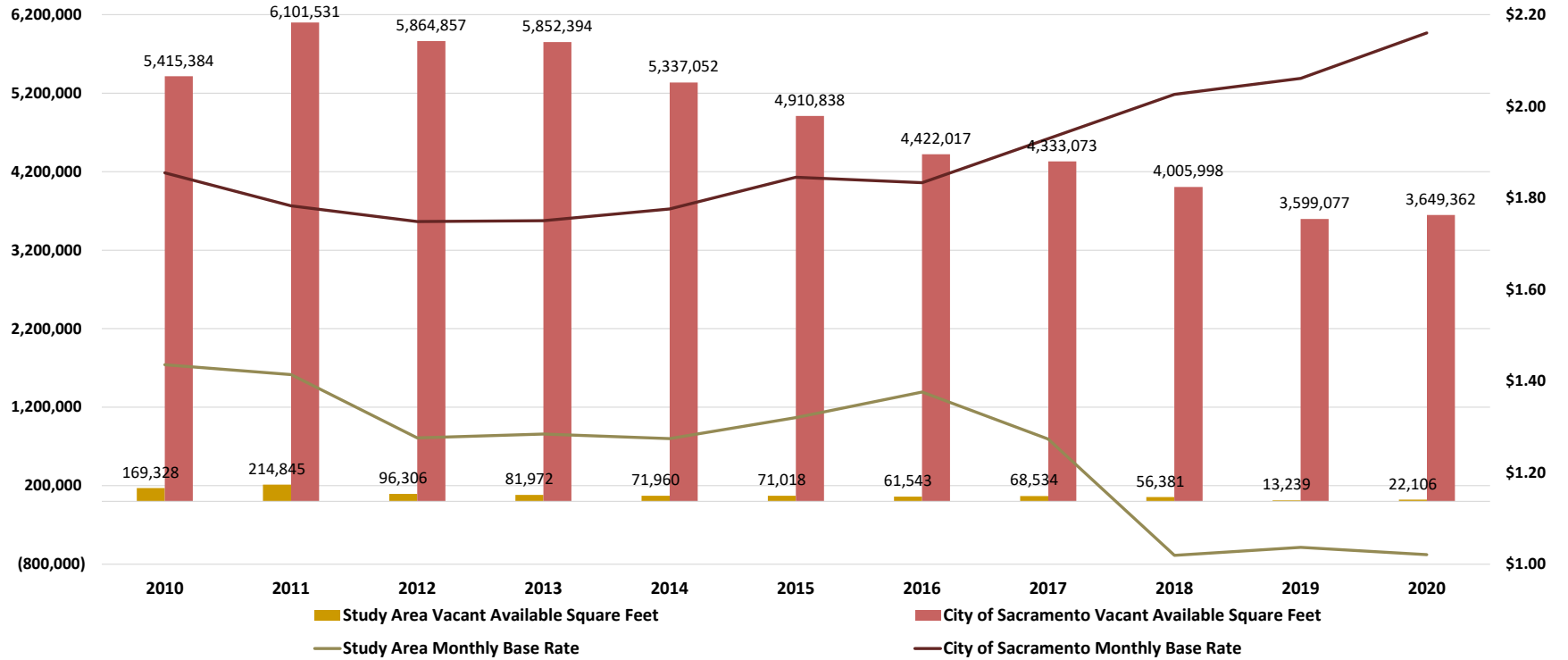
³⁹ CoStar lease rates are in current year dollars.

Figure 3-8. Office Net Absorption and Vacancy Rate Trends: Study Area and City of Sacramento (2010-2020)



Source: CoStar; EPS.

Figure 3-9. Office Total Vacant Inventory and Lease Rate Trends: Study Area and City of Sacramento (2010-2020)



Source: CoStar; EPS.

Medical Office

In the early 1900s, the State purchased over 150 acres along Stockton Boulevard, just north of Broadway, as a permanent site to house the annual California State Fair. Following the Fair's relocation to its current Cal Expo site, the acreage, located in the Elmhurst Subarea was sold to the UC Davis Medical Center, which is today a 625-bed multispecialty academic medical center.⁴⁰ In the late 1990s, the Shriners Hospital for Children opened an 80-bed regional pediatric medical center adjacent to the Medical Center, cementing the area as a major health care hub for the Sacramento Region and broader Northern California market.

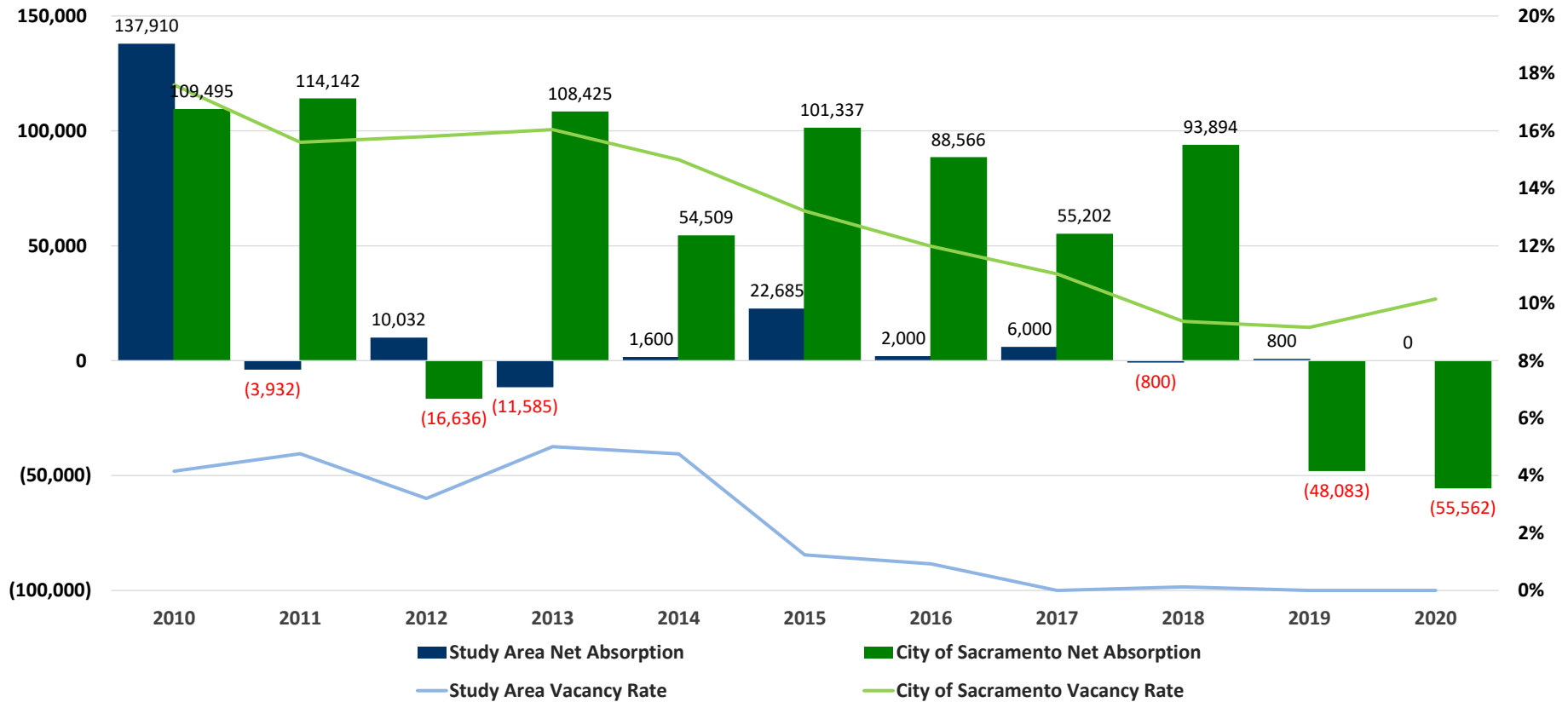
In addition to these medical facilities, the Study Area provides a little over 11 percent of the City's medical office supply with a total of 645,157 building square feet. The Study Area did not add medical office inventory during the period between 2010 and 2020 but experienced positive net absorption of over 165,000 square feet, including the addition of a large 141,200-square-foot Sutter Health medical office building built in 2010 and other small lease transactions under 3,000 square feet. See **Figure 3-10** and **Figure 3-11**. While the medical office space in the Study Area declined to zero vacancy, monthly lease rates decreased in the Study Area from \$1.98 per square foot to \$1.25 per square foot.⁴¹ In comparison, lease rates for medical office space in the City are substantially higher and remained nearly static, from \$1.88 to \$1.89.

The proposed Aggie Square project envisions 2.4 million-square feet of mixed use innovation and research center uses with various land use categories as shown in **Appendix B, Table B-1**. While the land use plan for Aggie Square does not specifically mention medical office space, its location adjacent to existing medical facilities and synergistic land uses could likely accommodate any projected additional demand in the Study Area.

⁴⁰ UC Davis Health About Us. [online] Available at: <https://health.ucdavis.edu/aboutus/> [Accessed January 2021].

⁴¹ CoStar lease rates are in current year dollars.

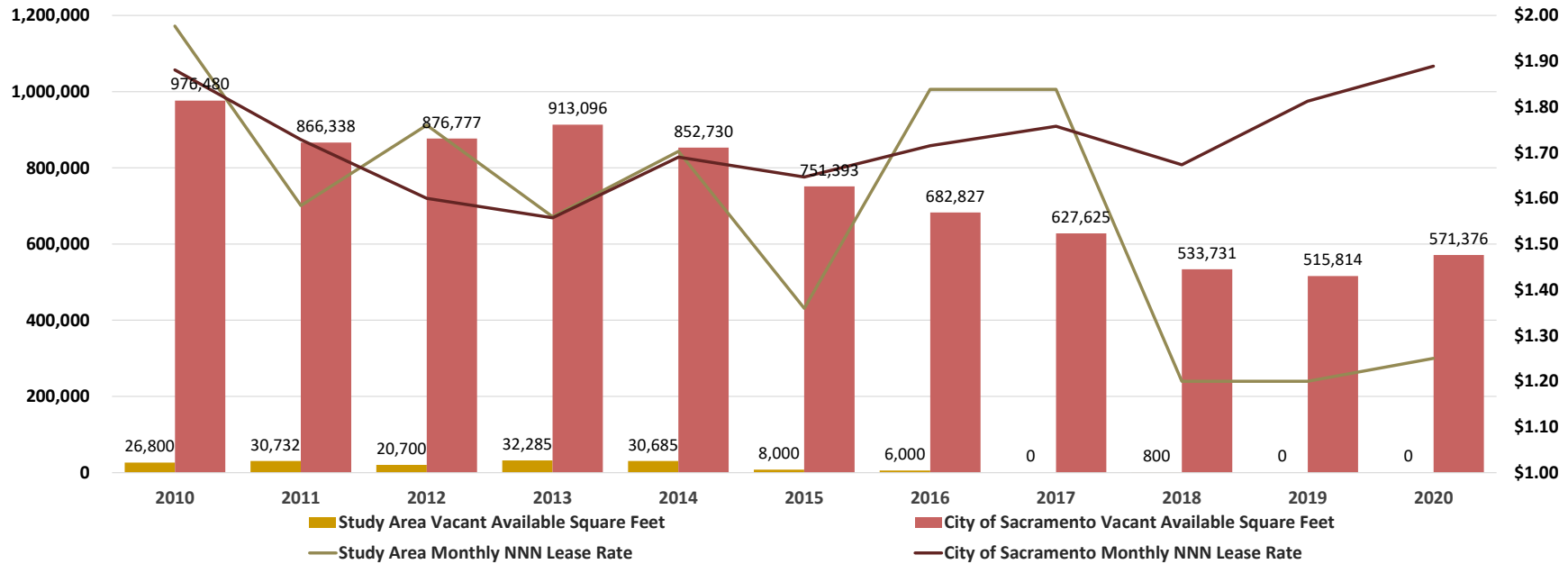
Figure 3-10. Medical Office Net Absorption and Vacancy Rate Trends: Study Area and City of Sacramento (2010-2020)



Note: This analysis does not include hospital space.

Source: CoStar; EPS.

Figure 3-11. Medical Office Total Vacant Inventory and Lease Rate Trends: Study Area and City of Sacramento (2010-2020)



Note: Lease rates for the Study Area in 2017 are unavailable from CoStar; value shown is equal to 2016 lease rates. This analysis does not include hospital space.

Source: CoStar; EPS.

Conclusions

In the Study Area, residential and retail development are likely the leading development land uses types due to the inexhaustible need for housing, especially affordable housing, and supportive retail. In addition, there is not much demand for office space in the Study Area and the market for medical office space will likely be fulfilled with the addition of Aggie Square. The projected demand for housing units and retail space is discussed further in **Chapter 4**.

4. Future Growth and Market Demand

This Study estimates demand for housing and retail space based on projected household growth in the Study Area and household spending on retail goods and services. This chapter provides background information on historic, existing (as of 2020), and projected growth in the Study Area and the City based on growth projections published by SACOG. This chapter also examines the current level of market demand within the Study Area and estimates how much demand may be expected from planned growth. The spatial location of existing demand and future growth is also presented.

Residential Growth Projections

Based on data from ACS and SACOG, historical population and household trends and projected growth through 2040 are shown in **Table 4-1**.⁴² The methodology used to estimate projected growth in the Study Area is described further later in this section.

As shown in **Table 4-1** and described in **Chapter 2**, as of 2020, the Study Area contained nearly 87,000 residents and almost 30,000 households. Based on 2036 SACOG data, which was extrapolated to determine projected growth by 2040 for this analysis, the Study Area is estimated to add almost 11,800 new residents and 4,040 new households by 2040. This level of growth is estimated to increase the Study Area population and households by a little more than 13 percent to 98,650 residents and 33,830 households by 2040, and translates into average, annual growth of about 590 residents and 200 households over the next 20 years. In comparison, between 2010 and 2018, the Study Area grew by an average of 480 residents and 170 households per year.

For context, the City is projected to add 96,900 new residents and 62,280 new households by 2040, translating into average annual growth of 4,850 residents and 3,100 households. Between 2020 and 2040, the Study Area is estimated to represent 12 percent of total Citywide population growth and 6 percent of household growth.

⁴² SACOG "ZIP Code Tabulation Areas (ZCTA) and Traffic Analysis Zone (TAZ) level Summary 2012 Estimate, 2020, and 2036 Projections; February 2016." SACOG provides population, household, and employment data for years 2012, 2020, and 2036; SACOG data is not available beyond 2036 by TAZ. Thus, EPS used the average annual growth rate between 2012 and 2020 to interpolate the base year of 2018. EPS estimated growth through 2040, using the average annual growth rate from 2020 to 2036 from SACOG's projections, with adjustments, as necessary, based on the land use programs of approved and planned development projects in the Study Area.

Table 4- 1. Population and Household Estimates and Projections (2010-2040)

Item	Study Area [1] [2]			City of Sacramento [3]		
	Population	Households	Persons/HH	Population	Households	Persons/HH
Year						
2010	82,177	28,260	2.9	466,488	173,938	2.7
2012	84,004	28,837	2.9	467,467	176,061	2.7
2016	86,350	29,124	3.0	472,693	183,419	2.6
2018	86,005	29,644	2.9	508,517	182,677	2.8
2020	86,848	29,791	2.9	521,557	188,225	2.8
2035	95,562	32,770	2.9	601,234	243,717	2.5
2040	98,646	33,827	2.9	618,439	250,506	2.5
Growth (2020 - 2040)						
Number	11,798	4,037	--	96,882	62,281	--
% Change	13.6%	13.5%	--	18.6%	33.1%	--
Avg. Annual Change	0.6%	0.6%	--	0.9%	1.4%	--
Household Vacancy		5.0%			5.0%	
Housing Units (2020-2040)		<i>Housing Units</i>			<i>Housing Units</i>	
Total Projected Housing Units	--	4,238	--	--	65,395	--
Average Annual Housing Units	--	212	--	--	3,270	--

pop and hh

Source: U.S. Census Bureau, ACS Table S0101; Sacramento Area Council of Governments (SACOG) MTP 2020/SCS 2016, 2035, and 2040; SACOG 2016 MTP/SCS Modeling Projections by Traffic Analysis Zones (TAZ) for 2012, 2020 and 2036; EPS.

- [1] SACOG's most recent projections are only available at city and county levels.
- [2] Population and household estimates for the Study Area from 2010 to 2018 per ACS. Projections for 2020 to 2040 are based on ACS numbers escalated by SACOG average annual growth rates from the SACOG 2016 MTP/SCS Modeling Projections by Traffic Analysis Zones (TAZ) for 2012, 2020 and 2036.
- [3] Population and household estimates for the City of Sacramento for 2010, 2012, and 2018 per ACS. Estimates and projections from 2016 to 2040 per SACOG MTP 2020/SCS 2016, 2035, and 2040.
- [4] The average vacancy rate in the Study Area between 2010 and 2018 is 4.2% and 3.1% in the City of Sacramento. EPS assumes a 5.0% vacancy rate for future housing housing.

Growth Projection Methodology

SACOG's current 2040 projections provide residential projections at the county and city level only, precluding the ability to estimate projected growth in the Study Area specifically. SACOG's previous projection dataset, which included projections through 2036, are offered at a smaller geographical level, the Traffic Analysis Zone (TAZ), an aggregation of which aligns with the Study Area boundary.⁴³ As such, EPS used SACOG's TAZ-level growth rates between 2020 and 2036 to extrapolate projections for the Study

⁴³ See Appendix C, Table C-2 for a list of Study Area TAZ and the SACOG projections.

Area through 2040. Citywide projections shown in **Table 4-1** reflect growth projections derived from SACOG's current 2040 dataset.

Estimated Housing Demand

The projected growth in households described in the previous section can be translated into projected demand for new housing units by applying a conservative vacancy rate to account for residential turnover. Despite historical low vacancy rates in the Study Area and City, this study applied an average vacancy rate of 5 percent, indicative of a healthy housing market, to determine residential demand for an additional **4,240 housing units**, or an average of 212 new housing units per year, between 2020 and 2040. In comparison, there was an average of 95 units added per year in the Study Area between 2000 and 2020.

SACOG projections indicate the bulk of new population and household growth is expected to occur in the Tahoe & Colonial, Oak Park, and South of Fruitridge Subareas. This study also notes current pipeline projects in **Appendix B, Table B-1** and **Table B-2** located in the Study Subareas. This list includes recently completed projects (e.g., The Gio) and projects that have been proposed or are under review. To date, there are an estimated 1,558 additional units (excluding The Gio) proposed for development in the Study Area, including one known affordable housing project containing 116 units. While not explicitly included in the 2036 SACOG projections, these pipeline projects will fulfill a proportion of projected growth.

Market Rate Residential Demand

As shown in **Table 4-2**, as of 2018, about 27 percent of households in the Study Area achieved household income levels at or above what is defined as the "Median" Income in 2020 by the State of California Department of Housing and Community Development (HCD), which is \$77,650 for a household size of 3, but varies based on household size.⁴⁴

⁴⁴ HCD's income limits define income levels based on an Area's Median Income (AMI). In 2020, the AMI for Sacramento County for a family of 3 is \$77,650. The income limits for households are defined as follows: "Extremely Low" is 30 percent or less of AMI; "Very Low" is between 30 percent and 50 percent of AMI, "Low" is between 50 percent and 80 percent of AMI; "Median" is between 80 percent and 100 percent of AMI; and "Moderate" is between 100 percent and 120 percent of AMI.

Table 4- 2. Households by Income Range: Study Area and City of Sacramento (2018)

Item	HCD Income Level [1]	2018 Households			
		Study Area		City of Sacramento	
		Households	%	Households	%
Income Range					
<\$15,000	Extremely Low	4,947	16.7%	23,017	12.6%
\$15,000 - \$24,999	Extremely Low - Very Low	4,056	13.7%	17,172	9.4%
\$25,000 - \$34,999	Extremely Low - Very Low	2,957	10.0%	16,076	8.8%
\$35,000 - \$49,999	Very Low - Low	4,562	15.4%	22,469	12.3%
\$50,000 - \$74,999	Very Low - Low	5,218	17.6%	32,517	17.8%
\$75,000 - \$99,999	Low - Median - Moderate	3,365	11.4%	22,835	12.5%
\$100,000 - \$149,999	Above Moderate	2,948	9.9%	26,671	14.6%
\$150,000 - \$199,999	Above Moderate	952	3.2%	11,326	6.2%
\$200,000+	Above Moderate	640	2.2%	10,595	5.8%
Total		29,644	100.0%	182,677	100.0%
Median Household Income		\$44,694	-	\$58,456	-

household income

Source: U.S. Census Bureau, ACS Table S1901 for 2019; United States Department of Housing and Urban Development FY 2020 Income Limits; State of California Department of Housing and Community Development, "State Income Limits for 2020"; EPS.

[1] EPS estimated the income range within the HCD 2020 income limits based on a household of 3 as shown in Table B-1.

This analysis estimates demand for market rate housing from the number of projected incremental new households with an average annual income of \$75,000 or more, based on the 2020 median income of \$77,650. The percentage of household by income range is based on the 2018 ACS income level percentages, which were applied to projected incremental new housing units.

Applying the income distribution percentages to future Study Area housing units establishes a projected demand for the addition of **1,130 market rate units** to be developed in the Study Area between 2020 and 2040, as shown on **Table 4-3**, equating to 27 percent of total housing units demanded in the Study Area.

The estimated minimum value in 2020 dollars of a market rate home is about \$245,000 and minimum rent is \$1,800 based on estimated housing costs based on the 2020 Income Limits AMI for Sacramento County shown in **Appendix B, Table B-4** and **Table B-5**. This means that this Study estimates about 27 percent of projected households, households defined as "Median" and higher, earn enough money to buy a home with a purchase price of \$245,000 or more or to pay monthly rent of \$1,800 or more using 35 percent of their income or less.⁴⁵ See **Table B-4** and **Table B-5** in **Appendix B** for more details regarding housing cost assumptions.

⁴⁵ Per the City of Sacramento's Mixed Housing Income Ordinance in Municipal Code Chapter 17.712, qualification for affordable housing prices shall be based on no more than 35% of income being applied to housing expenses.

Demand for 1,130 market rates units equals almost 80 percent of the proposed market rate residential units in the development pipeline summarized in **Table B-2**. That is, the estimated demand for 1,130 market rate units would be met if about 80 percent of the proposed, pipeline projects are approved and developed by 2040.

Table 4-3. New Study Area Household Demand by Income Level (2020-2040)

Item	HCD Income Level	Study Area Households	
		HH % by Income 2018	Projected New Housing Units 2020- 2040 [1]
<i>Formula</i>		<i>A</i>	<i>B = A * 2020 -2040 Units</i>
Income Range			
\$0 to \$24,999	Extremely Low - Very Low	30%	1,287
\$25,000 to \$34,999	Extremely Low - Very Low	10%	423
\$35,000 to \$49,999	Very Low - Low	15%	652
\$50,000 to \$74,999	Very Low - Low	18%	746
\$75,000 to \$99,999	Low - Median - Moderate	11%	481
\$100,000 to \$149,999	Above Moderate	10%	421
\$150,000 to \$199,999	Above Moderate	3%	136
\$200,000 or more	Above Moderate	2%	92
Total		100%	4,238
Residential Demand			
Market Rate	Median, Moderate, and Above Moderate	27%	1,130
Affordable	Extremely Low, Very Low, and Low	73%	3,108
Total Housing Units		100%	4,238

proj HH

Source: United States Department of Housing and Urban Development FY 2020 Income Limits; State of California Department of Housing and Community Development, "State Income Limits for 2020"; EPS.

[1] See Table 4-1.

Affordable Housing Demand

Also shown in **Table 4-2**, as of 2018, 73 percent of households in the Study Area fall within income levels defined by HCD as "Extremely Low", "Very Low", and "Low." This means that 73 percent of households in the Study Area would be challenged to own a house that is priced at or above about \$245,000 or pay more than about \$1,800 per month for rent, which is the estimated calculation for a "Low" income household of 3.⁴⁶ The median sale price of homes in the Study Area as of 2018 was \$262,000 and median monthly rents were about \$1,100, as discussed in **Chapter 3**. This means that if a household spent 35 percent of their income on housing costs for purchasing a home, based on housing costs shown in **Table B-4** and **Table B-5**, more than the estimated 73 percent of households in the Study Area in 2018 would have not been able to purchase

⁴⁶ See **Table B-4** in **Appendix B** for estimated housing costs.

half of the existing housing supply in the Study Area or would have had to spend more than the estimated 35 percent of their income on housing costs. In addition, approximately 56 percent of households in the Study Area, households defined as “Extremely Low” and “Very Low”, would not earn enough to spend 35 percent or less on half of the existing housing and would have had to spend more than the estimated 35 percent on their rental costs as shown in **Appendix B, Table B-4**.

Applying the 2018 income distribution percentages to future Study Area housing units for households that would be defined as “Extremely Low”, “Very Low”, and “Low” establishes a projected demand for the addition about **3,110 affordable units** to be developed in the Study Area between 2020 and 2040 as shown in **Table 4-3**. The only proposed project specifically designated as affordable in **Table B-2** is the project located in the Lemon Hill Subarea with 116 total units. If approved and developed, this project would meet 4 percent of demand for affordable units in the Study Area.

Estimated Retail Demand

This section reviews retail spending in the Study Area to estimate supportable retail in the Study Area from projected Study Area household growth and applies a range of capture rates to estimate different potential supportable retail sales and associated square footage scenarios. The potential capture for new retail located in the Study Area from new households will be based on the estimated extent of household spending and the addition of neighborhood-serving retail that may locate in the Study Area. The potential capture also depends on competitive retail options located directly adjacent to the Study Area and elsewhere, as well as in the City.

Existing Retail Inventory

As discussed in **Chapter 3**, the Study Area has an estimated 2.7 million square feet of retail space as of 2020. Stockton Blvd, Broadway, and Fruitridge are the main commercial corridors in the Study Area, which include “main street-type” commercial concentrations and neighborhood- and community-serving retail centers. Prominent retail centers in the Study Area are detailed below.

- In the Elmhurst Subarea, there is a stand-alone **Target** store on 65th St and 4th Avenue.
- The Food Source discount grocery store located on the northwest corner of Stockton Boulevard and Broadway in the Oak Park Subarea shuttered in March 2020 and is currently vacant. This space is anticipated that it will soon be re-leased to another grocery tenant. This center also has a **Walgreens** and **Chase Bank**.
- **Tallac Village Shopping Center**, on 14th Avenue in the Tahoe & Colonial Subarea, includes a smaller grocery store and smaller restaurants and service-oriented retail.

- The Fruitridge Pocket Subarea contains **Stockton Plaza**, which was originally anchored by a now shuttered K-Mart has been incrementally redeveloping with the addition of a 22,000-square-foot Planet Fitness in 2015, a 20,000-square-foot Smart & Final in 2019, and other smaller retail shops. The addition of 26,000-square-foot Ross Dress for Less and a Dutch Bros. Coffee kiosk are planned for the center.
- Also in the Fruitridge Pocket Subarea, the **Stockridge Plaza Shopping Center** includes a Foods Co grocery store, Harbor Freight Tools hardware, and other smaller retail.
- The Lemon Hill Subarea contains the **Pacific Rim Plaza**, located in the center of Little Saigon on Stockton and 65th St, which comprises about 140,000 square feet, with 43 tenant spaces in 6 buildings.
- The South of Fruitridge Subarea contains the **Fruitridge Shopping Center**, located at the southeast corner of Stockton Boulevard and Fruitridge Road. This center is currently undergoing redevelopment, with demolition of the original structure and development of a new 15,000-square-foot CVS Pharmacy, a 2,200-square-foot Starbucks with a drive-thru, and an additional 13,868-square-foot multi-tenant retail building. This project is estimated to be completed in 2021.

The following areas contain “main street-type” concentrations of retail in the Study Area:

- The section of Broadway in the **Oak Park Subarea** also discussed in Chapter 3, which includes redeveloped retail projects 40 Acres and the Broadway Triangle;
- Along Broadway straddling the **Elmhurst and Tahoe & Colonial Subareas**, which includes a variety of restaurants and service-oriented retail;
- On Stockton Blvd from about 10th Avenue to about 15th Avenue including smaller restaurants and retail.
- Franklin Blvd in the **Oak Park Subarea** from Fruitridge to 12th Ave, is a concentration of Hispanic-oriented retail and a strip of restaurants in the Curtis Park neighborhood.
- **The Little Saigon District**, which spans two miles along Stockton Blvd from Fruitridge to the southern City boundary includes a concentration of Vietnamese businesses as well as other retail in the **Lemon Hill Subarea**. This area includes, myriad restaurants and smaller retail stores, Rite Aid, the **Fruitridge Shopping Center** mentioned above, 4 larger ethnic supermarkets, a DD’s Discounts, and the **Pacific Rim Plaza**, also mentioned above.

Notable competitive retail outlets located adjacent to the Study Area include:

- Retail on the Folsom Blvd corridor near Alhambra Blvd and then from 47th Avenue to about Power Inn Rd. This stretch includes a mix of small retail and restaurants, grocery stores and big box stores such as Home Depot and Office Depot.

- A continuation of retail along the Broadway corridor west of Hwy 99 includes Smart & Final, older restaurants and other small retail shops.
- The newly developed Crocker Village Shopping Center anchored by Safeway and Pet Supplies Plus.
- Florin Road, including the Florin Towne Center, anchored by Walmart, Dollar Tree, PetSmart, Burlington, and Autozone), Southgate Plaza (anchored by 99 Ranch and Ross), a FoodMaxx across from Southgate Plaza.

Projected Incremental New Retail Demand

The Study Area is estimated to capture newly created demand from residential growth in the Study Area.⁴⁷ To quantify retail demand of new Study Area households, EPS developed an analytical model that relies on current Study Area household income and consumer spending patterns.⁴⁸ Assumptions underlying each component of existing Study Area household demand can be found in **Appendix B**.⁴⁹

Table 4-4 shows expenditure estimates per Study Area household. EPS estimates that, on average, Study Area households have a household income of approximately \$44,694 and spend about 45 percent of their income on retail goods and services (approximately \$20,000 per year).⁵⁰

Study Area Capture of Study Area Demand

Through 2040, the Study Area is estimated to accommodate projected residential growth of about 4,040 new households, as described previously. For this analysis, an average of \$17,300 per Study Area household is used to estimate total projected Study Area retail spending from new households.⁵¹ New households in the Study Area are estimated to add an additional \$69.6 million in spending power by 2040 as shown in **Table 4-4**. Existing and new retail development in the Study Area is estimated to capture a portion of this incremental new Study Area household spending.

⁴⁷ To remain conservative, this Study does not estimate demand from the growth of Study Area employees with the assumption that demand for retail space already may be accounted for in household demand projections.

⁴⁸ Consumer spending patterns exclude spending on e-commerce retail goods and services, which are, as a conservative assumption, not anticipated to contribute to demand for physical retail space.

⁴⁹ **Table B-6** estimates the household retail expenditures based on median household income. **Table B-7** estimates the percentage of spending at retail stores by retail category.

⁵⁰ Includes retail spending on physical retail outlets only; excludes spending on e-commerce retail goods and services.

⁵¹ EPS eliminated household spending on gas stations and motor vehicles and parts dealers from the total spending calculated in **Table B-6** as this analysis because part of the focus on this Project is to create a multi-modal, pedestrian and bicycle-friendly community with less orientation to the automobile that the area's historical past.

Table 4- 4. Study Area Demand from Incremental New Households (2020 – 2040) in 2018\$

Item	Spending per HH [1]	Net New Study Area Household Spending (Demand) (2020 - 2040) [2]
<i>Formula</i>	<i>A</i>	<i>B = A * 4,037</i>
Projected New Study Area Households [3]		4,037
Retail and Food Services		
Home Furnishings and Appliance Stores	\$1,557	\$6,285,411
Bldg. Matrl. and Garden Equip. and Supplies	\$995	\$4,015,237
Food and Beverage Stores	\$4,397	\$17,747,234
Clothing and Clothing Accessories Stores	\$1,513	\$6,105,674
General Merchandise Stores	\$3,119	\$12,591,070
Food Services and Drinking Places	\$3,920	\$15,823,354
Other Retail	\$1,754	\$7,079,530
Total	\$17,254	\$69,647,509

Source: EPS.

NOTE: FIGURES MAY NOT TOTAL BECAUSE OF ROUNDING.

[1] See Table B-6.

[2] The demand from Market Area household growth is derived by multiplying total households by the amount of spending per household for each retail category.

[3] See Table 4-1.

Retail outlets in the Study Area will not capture all of the incremental spending from new households; rather, the amount captured will depend on factors such as the extent of household spending, the type of retail that may locate in the Study Area, and competitive retail options located directly adjacent to the Study Area, as well elsewhere in and outside of the City and County. Applying a range of capture rates from low to high estimates potential scenarios of how much additional retail may be supported in the Study Area. These capture rate scenarios estimate that incremental new Study Area household spending may range from about \$17.4 million to \$52.2 million. Based on this level of household spending, supportable retail square feet may range from about **40,100 to 120,230 supportable retail square feet**, as shown in **Table 4-5**.⁵²

⁵² Supportable square feet is calculated by dividing estimated supportable sales by average total retail sales per square foot as shown in **Table B-8**.

Table 4- 5. Projected Supportable Retail Sales and Square Feet: Study Area (2020-2040) in 2018\$

Item	Net New Study Area Household Spending (Demand) (2020 - 2040) [2]	Range of Study Area Captured Supportive Sales from New Households (2020 - 2040)		Estimated Retail Sales per Square Foot [1]	Range of Supportive Retail Square Footage in the Study Area (2020 - 2040)	
		25%	75%		25%	75%
<i>Formula</i>	<i>A = Table 4-4</i>	<i>B = A * 25%</i>	<i>D = A * 75%</i>	<i>E</i>	<i>F = B * E</i>	<i>H = D * E</i>
Retail and Food Services						
Home Furnishings and Appliance Stores	\$6,285,411	\$1,571,353	\$4,714,058	\$573	2,741	8,224
Bldg. Matrl. and Garden Equip. and Supplies	\$4,015,237	\$1,003,809	\$3,011,428	\$389	2,583	7,749
Food and Beverage Stores	\$17,747,234	\$4,436,809	\$13,310,426	\$565	7,855	23,566
Clothing and Clothing Accessories Stores	\$6,105,674	\$1,526,418	\$4,579,255	\$404	3,777	11,331
General Merchandise Stores	\$12,591,070	\$3,147,767	\$9,443,302	\$393	8,006	24,019
Food Services and Drinking Places	\$15,823,354	\$3,955,839	\$11,867,516	\$537	7,361	22,082
Other Retail	\$7,079,530	\$1,769,882	\$5,309,647	\$228	7,753	23,258
Total	\$69,647,509	\$17,411,877	\$52,235,632	-	40,076	120,229

Source: EPS.

[1] See Table B-8 for total retail sales per square foot by retail category.

The projected supportable retail space shown in this study is a conservative estimate based on data available at this time. Additional sources of demand could be achieved through capture of existing leakage (to the extent leakage exists), demand from employees that work in the Study Area, but do not reside in the Study Area, and pass-by traffic from populations outside of the Study Area. It is anticipated that this retail demand analysis may be refined, as needed, following supplemental conversations regarding community preferences related to new retail outlets, and the feasibility of specific retail concepts and tenants.



APPENDICES:

- Appendix A: Employment and Jobs
- Appendix B: Future Demand: Housing and Retail
- Appendix C: Geographic Boundaries in the Study Area



APPENDIX A: Employment and Jobs

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**Table A-1
Stockton Boulevard Specific Plan
Social and Economic Context
Employed Residents by Industry (2010 - 2018)**

**Employed Residents by Industry
(2010 - 2018)**

Industry (NAICS) [1]	Study Area								City of Sacramento				Sacramento County							
	2010		2018		Change		2018 as % of		2010		2018		Change		2010		2018		Change	
	Total	Share	Total	Share	Total	%	City	County	Total	Share	Total	Share	Total	%	Total	Share	Total	Share	Total	%
Ag., Forestry, Fishing and Hunting (11)	292	1.0%	351	1.0%	59	20.2%	29.8%	6.4%	1,242	0.6%	1,177	0.6%	(65)	(5.2%)	3,365	0.5%	5,486	0.9%	2,121	63.0%
Mining, Quarrying, Oil & Gas Extr. (21)	11	0.0%	38	0.1%	27	245.5%	35.5%	8.8%	84	0.0%	107	0.1%	23	27.4%	406	0.1%	432	0.1%	26	6.4%
Utilities (22)	199	0.7%	130	0.4%	(69)	(34.7%)	7.3%	1.9%	1,792	0.9%	1,780	0.9%	(12)	(0.7%)	6,200	1.0%	7,018	1.1%	818	13.2%
Construction (23)	2,583	8.5%	3,447	9.5%	864	33.4%	25.6%	7.9%	12,734	6.2%	13,446	6.6%	712	5.6%	46,938	7.5%	43,737	7.0%	(3,201)	(6.8%)
Manufacturing (31-33)	2,172	7.1%	2,179	6.0%	7	0.3%	19.4%	5.7%	10,533	5.2%	11,238	5.5%	705	6.7%	36,492	5.8%	38,148	6.1%	1,656	4.5%
Wholesale Trade (42)	730	2.4%	970	2.7%	240	32.9%	17.1%	5.7%	5,670	2.8%	5,664	2.8%	(6)	(0.1%)	18,389	2.9%	17,066	2.7%	(1,323)	(7.2%)
Retail Trade (44-45)	3,229	10.6%	4,072	11.3%	843	26.1%	18.4%	5.4%	20,848	10.2%	22,115	10.8%	1,267	6.1%	69,779	11.1%	75,105	12.0%	5,326	7.6%
Transportation and Warehousing (48-49)	1,280	4.2%	1,409	3.9%	129	10.1%	13.7%	4.6%	8,218	4.0%	10,315	5.0%	2,097	25.5%	24,130	3.9%	30,687	4.9%	6,557	27.2%
Information (51)	683	2.2%	502	1.4%	(181)	(26.5%)	12.6%	4.0%	5,831	2.9%	3,993	2.0%	(1,838)	(31.5%)	15,996	2.6%	12,415	2.0%	(3,581)	(22.4%)
Finance and Insurance (52)	654	2.2%	1,124	3.1%	470	71.9%	11.5%	3.4%	9,731	4.8%	9,755	4.8%	24	0.2%	34,660	5.5%	33,141	5.3%	(1,519)	(4.4%)
Real Estate and Rental Leasing (53)	415	1.4%	612	1.7%	197	47.5%	12.5%	4.0%	4,448	2.2%	4,899	2.4%	451	10.1%	14,846	2.4%	15,164	2.4%	318	2.1%
Prof., Scientific, and Tech. Services (54)	1,005	3.3%	1,588	4.4%	583	58.0%	9.8%	3.5%	14,408	7.0%	16,181	7.9%	1,773	12.3%	40,359	6.4%	45,698	7.3%	5,339	13.2%
Mgmt of Companies and Enterprises (55)	34	0.1%	37	0.1%	3	8.8%	18.0%	8.3%	154	0.1%	205	0.1%	51	33.1%	547	0.1%	448	0.1%	(99)	(18.1%)
Admin., Support & Waste Mgmt Svcs (56)	2,364	7.8%	2,664	7.4%	300	12.7%	22.8%	7.6%	10,676	5.2%	11,673	5.7%	997	9.3%	31,846	5.1%	34,865	5.6%	3,019	9.5%
Educational Services (61)	2,453	8.1%	2,661	7.4%	208	8.5%	13.2%	4.8%	15,925	7.8%	20,111	9.8%	4,186	26.3%	48,593	7.8%	55,152	8.8%	6,559	13.5%
Health Care and Social Assistance (62)	4,321	14.2%	4,707	13.0%	386	8.9%	14.7%	4.8%	26,819	13.1%	32,120	15.7%	5,301	19.8%	80,142	12.8%	98,273	15.7%	18,131	22.6%
Arts, Entertainment, and Recreation (71)	555	1.8%	1,020	2.8%	465	83.8%	18.5%	6.5%	4,281	2.1%	5,507	2.7%	1,226	28.6%	12,295	2.0%	15,661	2.5%	3,366	27.4%
Accommodation and Food Services (72)	2,692	8.9%	3,515	9.7%	823	30.6%	19.8%	7.0%	15,418	7.5%	17,756	8.7%	2,338	15.2%	40,418	6.5%	49,870	8.0%	9,452	23.4%
Other Services (except Public Admin.) (81)	1,738	5.7%	2,059	5.7%	321	18.5%	17.8%	5.9%	10,129	5.0%	11,596	5.7%	1,467	14.5%	30,891	4.9%	34,990	5.6%	4,099	13.3%
Public Administration (9A-9B)	2,986	9.8%	3,037	8.4%	51	1.7%	11.2%	4.2%	25,573	12.5%	27,160	13.3%	1,587	6.2%	69,602	11.1%	72,663	11.6%	3,061	4.4%
Civilian Employed Population 16 Years and Over	30,396	100.0%	36,122	100.0%	5,726	18.8%			204,514	100.0%	226,798	100.0%	22,284	10.9%	625,894	100.0%	686,019	100.0%	60,125	9.6%

res industry

Source: US Census Bureau ACS, 2010 and 2018 5-Year Estimates Subject Tables (TableID: S2403); EPS.

[1] Employment by industry includes jobs which pay wages or salaries, regardless of hours worked, and does not include those who are self-employed, working unpaid for a family business or farm, or private or household workers.

Table A-2
Stockton Boulevard Specific Plan
Social and Economic Context
Employed Residents by Industry, Subareas (2010 - 2018)

**Employed Residents by Industry,
Subareas (2010 - 2018)**

Industry (NAICS) [1]	Elmhurst						Oak Park						Fruitridge Pocket					
	2010		2018		Change		2010		2018		Change		2010		2018		Change	
	Total	Share	Total	Share	Total	%	Total	Share	Total	Share	Total	%	Total	Share	Total	Share	Total	%
Ag., Forestry, Fishing and Hunting (11)	66	2.8%	0	0.0%	(66)	(100.0%)	0	0.0%	30	0.4%	30	-	8	0.4%	120	4.6%	112	1400.0%
Mining, Quarrying, Oil & Gas Extr. (21)	0	0.0%	0	0.0%	0	-	0	0.0%	5	0.1%	5	-	0	0.0%	0	0.0%	0	-
Utilities (22)	68	2.9%	34	1.3%	(34)	(50.0%)	26	0.5%	55	0.7%	29	111.5%	0	0.0%	11	0.4%	11	-
Construction (23)	141	6.0%	158	6.1%	17	12.1%	462	8.5%	570	7.6%	108	23.4%	228	10.1%	439	16.7%	211	92.5%
Manufacturing (31-33)	47	2.0%	143	5.5%	96	204.3%	345	6.3%	418	5.5%	73	21.2%	214	9.5%	112	4.3%	(102)	(47.7%)
Wholesale Trade (42)	72	3.1%	73	2.8%	1	1.4%	146	2.7%	277	3.7%	131	89.7%	24	1.1%	107	4.1%	83	345.8%
Retail Trade (44-45)	99	4.2%	232	8.9%	133	134.3%	452	8.3%	666	8.8%	214	47.3%	270	12.0%	318	12.1%	48	17.8%
Transportation and Warehousing (48-49)	56	2.4%	51	2.0%	(5)	(8.9%)	242	4.4%	190	2.5%	(52)	(21.5%)	41	1.8%	83	3.2%	42	102.4%
Information (51)	32	1.4%	69	2.6%	37	115.6%	119	2.2%	120	1.6%	1	0.8%	0	0.0%	16	0.6%	16	-
Finance and Insurance (52)	45	1.9%	114	4.4%	69	153.3%	192	3.5%	269	3.6%	77	40.1%	16	0.7%	24	0.9%	8	50.0%
Real Estate and Rental Leasing (53)	13	0.6%	15	0.6%	2	15.4%	73	1.3%	121	1.6%	48	65.8%	0	0.0%	18	0.7%	18	-
Prof., Scientific, and Tech. Services (54)	198	8.4%	276	10.6%	78	39.4%	257	4.7%	548	7.3%	291	113.2%	24	1.1%	33	1.3%	9	37.5%
Mgmt of Companies and Enterprises (55)	0	0.0%	0	0.0%	0	-	34	0.6%	16	0.2%	(18)	(52.9%)	0	0.0%	0	0.0%	0	-
Admin., Support & Waste Mgmt Svcs (56)	36	1.5%	67	2.6%	31	86.1%	274	5.0%	403	5.3%	129	47.1%	411	18.3%	310	11.8%	(101)	(24.6%)
Educational Services (61)	341	14.5%	467	17.9%	126	37.0%	469	8.6%	553	7.3%	84	17.9%	154	6.9%	153	5.8%	(1)	(0.6%)
Health Care and Social Assistance (62)	507	21.5%	251	9.6%	(256)	(50.5%)	883	16.2%	1,290	17.1%	407	46.1%	480	21.4%	298	11.3%	(182)	(37.9%)
Arts, Entertainment, and Recreation (71)	5	0.2%	79	3.0%	74	1480.0%	128	2.3%	271	3.6%	143	111.7%	46	2.0%	68	2.6%	22	47.8%
Accommodation and Food Services (72)	183	7.8%	167	6.4%	(16)	(8.7%)	361	6.6%	592	7.8%	231	64.0%	86	3.8%	125	4.8%	39	45.3%
Other Services (except Public Admin.) (81)	149	6.3%	81	3.1%	(68)	(45.6%)	390	7.1%	456	6.0%	66	16.9%	186	8.3%	160	6.1%	(26)	(14.0%)
Public Administration (9A-9B)	296	12.6%	328	12.6%	32	10.8%	608	11.1%	695	9.2%	87	14.3%	60	2.7%	233	8.9%	173	288.3%
Civilian Employed Population 16 Years and Over	2,354	100.0%	2,605	100.0%	251	10.7%	5,461	100.0%	7,545	100.0%	2,084	38.2%	2,248	100.0%	2,628	100.0%	380	16.9%

Source: US Census Bureau ACS, 2010 and 2018 5-Year Estimates Subject Tables (TableID: S2403); EPS.

[1] Employment by industry includes jobs which pay wages or salaries, regardless of hours worked, and does not include those who are self-employed, working unpaid for a family business or farm, or private or household workers.

Table A-2
Stockton Boulevard Specific Plan
Social and Economic Context
Employed Residents by Industry, Subareas (2010 - 2018)

**Employed Residents by Industry,
Subareas (2010 - 2018)**

Industry (NAICS) [1]	201 Total	Tahoe & Colonial						Lemon Hill						South of Fruitridge					
		2010		2018		Change		2010		2018		Change		2010		2018		Change	
		Total	Share	Total	Share	Total	%	Total	Share	Total	Share	Total	%	Total	Share	Total	Share	Total	%
Ag., Forestry, Fishing and Hunting (11)	66	40	0.5%	27	0.3%	(13)	(32.5%)	108	1.8%	101	1.5%	(7)	(6.5%)	70	1.0%	73	1.0%	3	4.3%
Mining, Quarrying, Oil & Gas Extr. (21)	0	0	0.0%	33	0.4%	33	-	0	0.0%	0	0.0%	0	-	11	0.2%	0	0.0%	(11)	(100.0%)
Utilities (22)	68	97	1.3%	15	0.2%	(82)	(84.5%)	0	0.0%	9	0.1%	9	-	8	0.1%	6	0.1%	(2)	(25.0%)
Construction (23)	141	407	5.5%	789	8.4%	382	93.9%	599	10.0%	932	14.3%	333	55.6%	746	10.8%	559	7.5%	(187)	(25.1%)
Manufacturing (31-33)	47	320	4.3%	506	5.4%	186	58.1%	684	11.4%	418	6.4%	(266)	(38.9%)	562	8.1%	582	7.8%	20	3.6%
Wholesale Trade (42)	72	218	2.9%	187	2.0%	(31)	(14.2%)	143	2.4%	164	2.5%	21	14.7%	127	1.8%	162	2.2%	35	27.6%
Retail Trade (44-45)	99	809	10.9%	934	10.0%	125	15.5%	766	12.8%	965	14.8%	199	26.0%	833	12.1%	957	12.9%	124	14.9%
Transportation and Warehousing (48-49)	56	249	3.4%	459	4.9%	210	84.3%	350	5.8%	339	5.2%	(11)	(3.1%)	342	5.0%	287	3.9%	(55)	(16.1%)
Information (51)	32	139	1.9%	124	1.3%	(15)	(10.8%)	106	1.8%	81	1.2%	(25)	(23.6%)	287	4.2%	92	1.2%	(195)	(67.9%)
Finance and Insurance (52)	45	172	2.3%	380	4.1%	208	120.9%	84	1.4%	100	1.5%	16	19.0%	145	2.1%	237	3.2%	92	63.4%
Real Estate and Rental Leasing (53)	13	243	3.3%	187	2.0%	(56)	(23.0%)	67	1.1%	138	2.1%	71	106.0%	19	0.3%	133	1.8%	114	600.0%
Prof., Scientific, and Tech. Services (54)	198	394	5.3%	338	3.6%	(56)	(14.2%)	68	1.1%	210	3.2%	142	208.8%	64	0.9%	183	2.5%	119	185.9%
Mgmt of Companies and Enterprises (55)	0	0	0.0%	6	0.1%	6	-	0	0.0%	0	0.0%	0	-	0	0.0%	15	0.2%	15	-
Admin., Support & Waste Mgmt Svcs (56)	36	442	6.0%	722	7.7%	280	63.3%	465	7.7%	631	9.7%	166	35.7%	736	10.7%	531	7.1%	(205)	(27.9%)
Educational Services (61)	341	721	9.7%	992	10.6%	271	37.6%	376	6.3%	179	2.7%	(197)	(52.4%)	392	5.7%	317	4.3%	(75)	(19.1%)
Health Care and Social Assistance (62)	507	918	12.4%	1,176	12.5%	258	28.1%	704	11.7%	721	11.0%	17	2.4%	829	12.0%	971	13.1%	142	17.1%
Arts, Entertainment, and Recreation (71)	5	138	1.9%	190	2.0%	52	37.7%	131	2.2%	170	2.6%	39	29.8%	107	1.5%	242	3.3%	135	126.2%
Accommodation and Food Services (72)	183	567	7.6%	899	9.6%	332	58.6%	639	10.6%	808	12.4%	169	26.4%	856	12.4%	924	12.4%	68	7.9%
Other Services (except Public Admin.) (81)	149	365	4.9%	428	4.6%	63	17.3%	290	4.8%	280	4.3%	(10)	(3.4%)	358	5.2%	654	8.8%	296	82.7%
Public Administration (9A-9B)	296	1,184	16.0%	988	10.5%	(196)	(16.6%)	425	7.1%	288	4.4%	(137)	(32.2%)	413	6.0%	505	6.8%	92	22.3%
Civilian Employed Population 16 Years and Over	2,354	7,423	100.0%	9,380	100.0%	1,957	26.4%	6,005	100.0%	6,534	100.0%	529	8.8%	6,905	100.0%	7,430	100.0%	525	7.6%

res industry sa

Source: US Census Bureau ACS, 2010 and 2018 5-Year Estimates Subj

[1] Employment by industry includes jobs which pay wages or salaries, regardless of hours worked, and does not include those who are self-employed, working unpaid for a family business or farm, or private or household workers.

**Table A-3
Stockton Boulevard Specific Plan
Social and Economic Context
Employed Residents by Occupation (2010 - 2018)**

**Resident Employment
Composition by Occupation
(2010 - 2018)**

Occupation (SOC)	Training Level [2]	Study Area								Sacramento City					
		2010		2018		Change		2018 as % of		2010		2018		Change	
		Total	Share	Total	Share	Total	%	City	County	Total	Share	Total	Share	Total	%
Management Occupations (11-0000)	High	1,674	5.5%	2,124	5.9%	450	26.9%	11.0%	3.3%	19,001	9.3%	19,372	8.5%	371	2.0%
Business and Financial Operations Occupations (13-0000)	High	1,443	4.7%	1,681	4.7%	238	16.5%	11.3%	3.8%	13,308	6.5%	14,815	6.5%	1,507	11.3%
Computer and Mathematical Occupations (15-0000)	High	585	1.9%	848	2.3%	263	45.0%	8.4%	2.9%	7,433	3.6%	10,118	4.5%	2,685	36.1%
Architecture and Engineering Occupations (17-0000)	High	181	0.6%	653	1.8%	472	260.8%	14.1%	4.7%	3,640	1.8%	4,633	2.0%	993	27.3%
Life, Physical, and Social Science Occupations (19-0000)	High	354	1.2%	304	0.8%	(50)	(14.1%)	9.6%	4.3%	2,815	1.4%	3,179	1.4%	364	12.9%
Community and Social Service Occupations (21-0000)	High	595	2.0%	642	1.8%	47	7.9%	15.3%	5.1%	4,190	2.0%	4,200	1.9%	10	0.2%
Legal Occupations (23-0000)	High	338	1.1%	276	0.8%	(62)	(18.3%)	6.6%	3.2%	4,247	2.1%	4,198	1.9%	(49)	(1.2%)
Educational Instruction, and Library Occupations (25-0000)	High	1,274	4.2%	1,899	5.3%	625	49.1%	14.5%	5.2%	9,769	4.8%	13,133	5.8%	3,364	34.4%
Arts, Design, Entertainment, Sports, and Media Occupations (27-0000)	High	431	1.4%	875	2.4%	444	103.0%	17.4%	6.5%	4,472	2.2%	5,027	2.2%	555	12.4%
Health Diagnosing & Treating Pract. and Other Tech. Occ. (29-1000)	High	665	2.2%	1,087	3.0%	422	63.5%	12.9%	4.2%	5,727	2.8%	8,426	3.7%	2,699	47.1%
Health Technologists and Technicians (29-2000)	High	399	1.3%	561	1.6%	162	40.6%	15.3%	4.5%	2,666	1.3%	3,656	1.6%	990	37.1%
Healthcare Support Occupations (31-0000)	Low	771	2.5%	1,967	5.4%	1,196	155.1%	19.7%	6.7%	4,440	2.2%	9,971	4.4%	5,531	124.6%
Firefighting, Prevention, & Other Protective Svc Workers Incl. Spvrs (33-2000)	Medium	391	1.3%	595	1.6%	204	52.2%	19.7%	6.5%	2,328	1.1%	3,021	1.3%	693	29.8%
Law Enforcement Workers Including Supervisors (33-3000)	Medium	85	0.3%	232	0.6%	147	172.9%	13.3%	3.8%	1,249	0.6%	1,743	0.8%	494	39.6%
Food Preparation and Serving Related Occupations (35-0000)	Low	2,384	7.8%	2,973	8.2%	589	24.7%	22.2%	7.5%	13,040	6.4%	13,379	5.9%	339	2.6%
Building and Grounds Cleaning and Maintenance Occupations (37-0000)	Low	2,490	8.2%	2,043	5.7%	(447)	(18.0%)	23.2%	7.8%	8,665	4.2%	8,811	3.9%	146	1.7%
Personal Care and Service Occupations (39-0000)	Low	1,498	4.9%	1,045	2.9%	(453)	(30.2%)	14.7%	4.9%	9,239	4.5%	7,090	3.1%	(2,149)	(23.3%)
Sales and Related Occupations (41-0000)	Low	2,515	8.3%	3,094	8.6%	579	23.0%	14.6%	4.4%	20,776	10.2%	21,181	9.3%	405	1.9%
Office and Administrative Support Occupations (43-0000)	Low	4,886	16.1%	4,247	11.8%	(639)	(13.1%)	14.6%	4.8%	33,076	16.2%	29,169	12.9%	(3,907)	(11.8%)
Farming, Fishing, and Forestry Occupations (45-0000)	Low	143	0.5%	259	0.7%	116	81.1%	30.8%	8.3%	624	0.3%	841	0.4%	217	34.8%
Construction and Extraction Occupations (47-0000)	Medium	2,260	7.4%	2,946	8.2%	686	30.4%	28.7%	9.4%	9,669	4.7%	10,281	4.5%	612	6.3%
Installation, Maintenance, and Repair Occupations (49-0000)	Medium	862	2.8%	1,087	3.0%	225	26.1%	19.8%	5.7%	5,329	2.6%	5,483	2.4%	154	2.9%
Production Occupations (51-0000)	Low	1,848	6.1%	1,727	4.8%	(121)	(6.5%)	22.1%	7.2%	7,493	3.7%	7,802	3.4%	309	4.1%
Transportation and Material Moving Occupations (53-0000)	Low	2,324	7.6%	2,957	8.2%	633	27.2%	17.1%	6.0%	11,318	5.5%	17,269	7.6%	5,951	52.6%
Civilian Employed Population 16 Years and Over		30,396	100.0%	36,122	100.0%	5,726	18.8%			204,514	100.0%	226,798	100.0%	22,284	10.9%

Source: US Census Bureau, 2010 and 2018 ACS 5-Year Estimates Subject Tables (TableID: S2401); EPS.

- [1] Employment by industry includes jobs which pay wages or salaries, regardless of hours worked, and does not include those who are self-employed, working unpaid for a family business or farm, or private or household workers.
- [2] Levels of training by occupations are based on information provided by O*NET, a source on key characteristics of workers and occupations utilized by US Bureau of Labor Statistics. Low training level = some on-the-job training and high school-level education; Medium training level = considerable on-the-job training, vocational education, or Associate's degree; High training level = four-year degree or above plus work experience.

**Table A-3
Stockton Boulevard Specific Plan
Social and Economic Context
Employed Residents by Occupation (2010 - 2018)**

**Resident Employment
Composition by Occupation
(2010 - 2018)**

Occupation (SOC)	Training Level [2]	Sacramento County					
		2010		2018		Change	
		Total	Share	Total	Share	Total	%
Management Occupations (11-0000)	High	60,928	9.7%	63,484	9.3%	2,556	4.2%
Business and Financial Operations Occupations (13-0000)	High	38,719	6.2%	44,071	6.4%	5,352	13.8%
Computer and Mathematical Occupations (15-0000)	High	22,431	3.6%	29,261	4.3%	6,830	30.4%
Architecture and Engineering Occupations (17-0000)	High	13,154	2.1%	13,947	2.0%	793	6.0%
Life, Physical, and Social Science Occupations (19-0000)	High	6,229	1.0%	7,152	1.0%	923	14.8%
Community and Social Service Occupations (21-0000)	High	10,998	1.8%	12,483	1.8%	1,485	13.5%
Legal Occupations (23-0000)	High	9,284	1.5%	8,645	1.3%	(639)	(6.9%)
Educational Instruction, and Library Occupations (25-0000)	High	30,727	4.9%	36,656	5.3%	5,929	19.3%
Arts, Design, Entertainment, Sports, and Media Occupations (27-0000)	High	10,850	1.7%	13,459	2.0%	2,609	24.0%
Health Diagnosing & Treating Pract. and Other Tech. Occ. (29-1000)	High	19,130	3.1%	26,060	3.8%	6,930	36.2%
Health Technologists and Technicians (29-2000)	High	9,005	1.4%	12,346	1.8%	3,341	37.1%
Healthcare Support Occupations (31-0000)	Low	13,712	2.2%	29,566	4.3%	15,854	115.6%
Firefighting, Prevention, & Other Protective Svc Workers Incl. Spvsrs (33-2000)	Medium	8,422	1.3%	9,138	1.3%	716	8.5%
Law Enforcement Workers Including Supervisors (33-3000)	Medium	6,097	1.0%	6,178	0.9%	81	1.3%
Food Preparation and Serving Related Occupations (35-0000)	Low	32,882	5.3%	39,438	5.7%	6,556	19.9%
Building and Grounds Cleaning and Maintenance Occupations (37-0000)	Low	24,225	3.9%	26,319	3.8%	2,094	8.6%
Personal Care and Service Occupations (39-0000)	Low	27,122	4.3%	21,538	3.1%	(5,584)	(20.6%)
Sales and Related Occupations (41-0000)	Low	69,633	11.1%	70,407	10.3%	774	1.1%
Office and Administrative Support Occupations (43-0000)	Low	102,468	16.4%	88,793	12.9%	(13,675)	(13.3%)
Farming, Fishing, and Forestry Occupations (45-0000)	Low	1,906	0.3%	3,130	0.5%	1,224	64.2%
Construction and Extraction Occupations (47-0000)	Medium	33,941	5.4%	31,435	4.6%	(2,506)	(7.4%)
Installation, Maintenance, and Repair Occupations (49-0000)	Medium	18,626	3.0%	19,194	2.8%	568	3.0%
Production Occupations (51-0000)	Low	22,832	3.6%	23,949	3.5%	1,117	4.9%
Transportation and Material Moving Occupations (53-0000)	Low	32,573	5.2%	49,370	7.2%	16,797	51.6%
Civilian Employed Population 16 Years and Over		625,894	100.0%	686,019	100.0%	60,125	9.6%

occupation

Source: US Census Bureau, 2010 and 2018 ACS 5-Year Estimates Subject Tables (TableID: S

[1] Employment by industry includes jobs which pay wages or salaries, regardless of hours worked, and does not include those who are self-employed, working unpaid for a family business or farm, or private or household workers.
 [2] Levels of training by occupations are based on information provided by O*NET, a source on key characteristics of workers and occupations utilized by US Bureau of Labor Statistics. Low training level = some on-the-job training and high school-level education; Medium training level = considerable on-the-job training, vocational education, or Associate's degree; High training level = four-year degree or above plus work experienc

**Table A-4
Stockton Boulevard Specific Plan
Social and Economic Context
Employed Residents by Occupation, Subareas (2010 - 2018)**

**Resident Employment
Composition by Occupation,
Subareas (2010 - 2018)**

Industry (NAICS) [1]	Training Level [2]	Elmhurst						Oak Park					
		2010		2018		Change		2010		2018		Change	
		Total	Share	Total	Share	Total	%	Total	Share	Total	Share	Total	%
Management Occupations (11-0000)	High	423	18.0%	331	12.7%	(92)	(21.7%)	137	2.5%	506	6.7%	369	269.3%
Business and Financial Operations Occupations (13-0000)	High	78	3.3%	283	10.9%	205	262.8%	190	3.5%	389	5.2%	199	104.7%
Computer and Mathematical Occupations (15-0000)	High	61	2.6%	65	2.5%	4	6.6%	106	1.9%	282	3.7%	176	166.0%
Architecture and Engineering Occupations (17-0000)	High	33	1.4%	147	5.6%	114	345.5%	65	1.2%	188	2.5%	123	189.2%
Life, Physical, and Social Science Occupations (19-0000)	High	119	5.1%	23	0.9%	(96)	(80.7%)	104	1.9%	99	1.3%	(5)	(4.8%)
Community and Social Service Occupations (21-0000)	High	62	2.6%	-	0.0%	(62)	(100.0%)	143	2.6%	133	1.8%	(10)	(7.0%)
Legal Occupations (23-0000)	High	74	3.1%	84	3.2%	10	13.5%	105	1.9%	79	1.0%	(26)	(24.8%)
Educational Instruction, and Library Occupations (25-0000)	High	157	6.7%	407	15.6%	250	159.2%	208	3.8%	540	7.2%	332	159.6%
Arts, Design, Entertainment, Sports, and Media Occupations (27-0000)	High	93	4.0%	191	7.3%	98	105.4%	142	2.6%	264	3.5%	122	85.9%
Health Diagnosing & Treating Pract. and Other Tech. Occ. (29-1000)	High	196	8.3%	136	5.2%	(60)	(30.6%)	169	3.1%	369	4.9%	200	118.3%
Health Technologists and Technicians (29-2000)	High	40	1.7%	-	0.0%	(40)	(100.0%)	87	1.6%	95	1.3%	8	9.2%
Healthcare Support Occupations (31-0000)	Low	34	1.4%	-	0.0%	(34)	(100.0%)	106	1.9%	405	5.4%	299	282.1%
Firefighting, Prevention, & Other Protective Svc Workers Incl. Spvsrs (33-2000)	Medium	23	1.0%	-	0.0%	(23)	(100.0%)	47	0.9%	53	0.7%	6	12.8%
Law Enforcement Workers Including Supervisors (33-3000)	Medium	-	0.0%	-	0.0%	-	-	-	0.0%	41	0.5%	41	-
Food Preparation and Serving Related Occupations (35-0000)	Low	152	6.5%	129	5.0%	(23)	(15.1%)	358	6.6%	506	6.7%	148	41.3%
Building and Grounds Cleaning and Maintenance Occupations (37-0000)	Low	-	0.0%	76	2.9%	76	-	462	8.5%	349	4.6%	(113)	(24.5%)
Personal Care and Service Occupations (39-0000)	Low	51	2.2%	-	0.0%	(51)	(100.0%)	331	6.1%	230	3.0%	(101)	(30.5%)
Sales and Related Occupations (41-0000)	Low	145	6.2%	193	7.4%	48	33.1%	520	9.5%	604	8.0%	84	16.2%
Office and Administrative Support Occupations (43-0000)	Low	394	16.7%	219	8.4%	(175)	(44.4%)	1,050	19.2%	979	13.0%	(71)	(6.8%)
Farming, Fishing, and Forestry Occupations (45-0000)	Low	9	0.4%	-	0.0%	(9)	(100.0%)	-	0.0%	26	0.3%	26	-
Construction and Extraction Occupations (47-0000)	Medium	73	3.1%	142	5.5%	69	94.5%	432	7.9%	519	6.9%	87	20.1%
Installation, Maintenance, and Repair Occupations (49-0000)	Medium	61	2.6%	51	2.0%	(10)	(16.4%)	97	1.8%	194	2.6%	97	100.0%
Production Occupations (51-0000)	Low	42	1.8%	24	0.9%	(18)	(42.9%)	193	3.5%	171	2.3%	(22)	(11.4%)
Transportation and Material Moving Occupations (53-0000)	Low	34	1.4%	104	4.0%	70	205.9%	409	7.5%	524	6.9%	115	28.1%
Civilian Employed Population 16 Years and Over		2,354	100.0%	2,605	100.0%	251	10.7%	5,461	100.0%	7,545	100.0%	2,084	38.2%

Source: US Census Bureau, 2010 and 2018 ACS 5-Year Estimates Subject Tables (TableID: S2401); EPS.

[1] Employment by industry includes jobs which pay wages or salaries, regardless of hours worked, and does not include those who are self-employed, working unpaid for a family business or farm, or private or household workers.

[2] Levels of training by occupations are based on information provided by O*NET, a source on key characteristics of workers and occupations utilized by US Bureau of Labor Statistics. Low training level = some on-the-job training and high school-level education; Medium training level = considerable on-the-job training, vocational education, or Associate's degree; High training level = four-year degree or above plus work experience.

Table A-4
Stockton Boulevard Specific Plan
Social and Economic Context
Employed Residents by Occupation, Subareas (2010 - 2018)

Resident Employment
Composition by Occupation,
Subareas (2010 - 2018)

Industry (NAICS) [1]	Training Level [2]	Fruitridge Pocket						Tahoe & Colonial					
		2010		2018		Change		2010		2018		Change	
		Total	Share	Total	Share	Total	%	Total	Share	Total	Share	Total	%
Management Occupations (11-0000)	High	72	3.2%	78	3.0%	6	8.3%	559	7.5%	850	9.1%	291	52.1%
Business and Financial Operations Occupations (13-0000)	High	79	3.5%	97	3.7%	18	22.8%	554	7.5%	456	4.9%	(98)	(17.7%)
Computer and Mathematical Occupations (15-0000)	High	8	0.4%	32	1.2%	24	300.0%	292	3.9%	256	2.7%	(36)	(12.3%)
Architecture and Engineering Occupations (17-0000)	High	-	0.0%	21	0.8%	21	-	43	0.6%	177	1.9%	134	311.6%
Life, Physical, and Social Science Occupations (19-0000)	High	-	0.0%	23	0.9%	23	-	131	1.8%	152	1.6%	21	16.0%
Community and Social Service Occupations (21-0000)	High	21	0.9%	75	2.9%	54	257.1%	245	3.3%	273	2.9%	28	11.4%
Legal Occupations (23-0000)	High	34	1.5%	-	0.0%	(34)	(100.0%)	54	0.7%	101	1.1%	47	87.0%
Educational Instruction, and Library Occupations (25-0000)	High	36	1.6%	61	2.3%	25	69.4%	402	5.4%	555	5.9%	153	38.1%
Arts, Design, Entertainment, Sports, and Media Occupations (27-0000)	High	12	0.5%	51	1.9%	39	325.0%	136	1.8%	189	2.0%	53	39.0%
Health Diagnosing & Treating Pract. and Other Tech. Occ. (29-1000)	High	21	0.9%	10	0.4%	(11)	(52.4%)	182	2.5%	423	4.5%	241	132.4%
Health Technologists and Technicians (29-2000)	High	12	0.5%	4	0.2%	(8)	(66.7%)	168	2.3%	201	2.1%	33	19.6%
Healthcare Support Occupations (31-0000)	Low	111	4.9%	215	8.2%	104	93.7%	153	2.1%	513	5.5%	360	235.3%
Firefighting, Prevention, & Other Protective Svc Workers Incl. Spvsrs (33-2000)	Medium	9	0.4%	28	1.1%	19	211.1%	83	1.1%	256	2.7%	173	208.4%
Law Enforcement Workers Including Supervisors (33-3000)	Medium	4	0.2%	-	0.0%	(4)	(100.0%)	63	0.8%	86	0.9%	23	36.5%
Food Preparation and Serving Related Occupations (35-0000)	Low	127	5.6%	171	6.5%	44	34.6%	475	6.4%	739	7.9%	264	55.6%
Building and Grounds Cleaning and Maintenance Occupations (37-0000)	Low	417	18.5%	278	10.6%	(139)	(33.3%)	445	6.0%	347	3.7%	(98)	(22.0%)
Personal Care and Service Occupations (39-0000)	Low	172	7.7%	44	1.7%	(128)	(74.4%)	227	3.1%	166	1.8%	(61)	(26.9%)
Sales and Related Occupations (41-0000)	Low	151	6.7%	137	5.2%	(14)	(9.3%)	580	7.8%	873	9.3%	293	50.5%
Office and Administrative Support Occupations (43-0000)	Low	288	12.8%	333	12.7%	45	15.6%	1,414	19.0%	1,103	11.8%	(311)	(22.0%)
Farming, Fishing, and Forestry Occupations (45-0000)	Low	-	0.0%	66	2.5%	66	-	10	0.1%	-	0.0%	(10)	(100.0%)
Construction and Extraction Occupations (47-0000)	Medium	237	10.5%	334	12.7%	97	40.9%	402	5.4%	713	7.6%	311	77.4%
Installation, Maintenance, and Repair Occupations (49-0000)	Medium	88	3.9%	129	4.9%	41	46.6%	96	1.3%	106	1.1%	10	10.4%
Production Occupations (51-0000)	Low	211	9.4%	177	6.7%	(34)	(16.1%)	192	2.6%	274	2.9%	82	42.7%
Transportation and Material Moving Occupations (53-0000)	Low	138	6.1%	264	10.0%	126	91.3%	517	7.0%	571	6.1%	54	10.4%
Civilian Employed Population 16 Years and Over		2,248	100.0%	2,628	100.0%	380	16.9%	7,423	100.0%	9,380	100.0%	1,957	26.4%

Source: US Census Bureau, 2010 and 2018 ACS 5-Year Estimates Subject Tables (TableID: S24C)

- [1] Employment by industry includes jobs which pay wages or salaries, regardless of hours worked, and does not include those who are self-employed, working unpaid for a family business or farm, or private or household workers.
- [2] Levels of training by occupations are based on information provided by O*NET, a source on key characteristics of workers and occupations utilized by US Bureau of Labor Statistics. Low training level = some on-the-job training and high school-level education; Medium training level = considerable on-the-job training, vocational education, or Associate's degree; High training level = four-year degree or above plus work experience.

Table A-4
Stockton Boulevard Specific Plan
Social and Economic Context
Employed Residents by Occupation, Subareas (2010 - 2018)

**Resident Employment
 Composition by Occupation,
 Subareas (2010 - 2018)**

Industry (NAICS) [1]	Training Level [2]	Lemon Hill						South of Fruitridge					
		2010		2018		Change		2010		2018		Change	
		Total	Share	Total	Share	Total	%	Total	Share	Total	Share	Total	%
Management Occupations (11-0000)	High	147	2.4%	198	3.0%	51	34.7%	336	4.9%	161	2.2%	(175)	(52.1%)
Business and Financial Operations Occupations (13-0000)	High	261	4.3%	209	3.2%	(52)	(19.9%)	281	4.1%	247	3.3%	(34)	(12.1%)
Computer and Mathematical Occupations (15-0000)	High	56	0.9%	14	0.2%	(42)	(75.0%)	62	0.9%	199	2.7%	137	221.0%
Architecture and Engineering Occupations (17-0000)	High	-	0.0%	65	1.0%	65	-	40	0.6%	55	0.7%	15	37.5%
Life, Physical, and Social Science Occupations (19-0000)	High	-	0.0%	-	0.0%	-	-	-	0.0%	7	0.1%	7	-
Community and Social Service Occupations (21-0000)	High	87	1.4%	47	0.7%	(40)	(46.0%)	37	0.5%	114	1.5%	77	208.1%
Legal Occupations (23-0000)	High	55	0.9%	-	0.0%	(55)	(100.0%)	16	0.2%	12	0.2%	(4)	(25.0%)
Educational Instruction, and Library Occupations (25-0000)	High	254	4.2%	118	1.8%	(136)	(53.5%)	217	3.1%	218	2.9%	1	0.5%
Arts, Design, Entertainment, Sports, and Media Occupations (27-0000)	High	8	0.1%	138	2.1%	130	1625.0%	40	0.6%	42	0.6%	2	5.0%
Health Diagnosing & Treating Pract. and Other Tech. Occ. (29-1000)	High	45	0.7%	53	0.8%	8	17.8%	52	0.8%	96	1.3%	44	84.6%
Health Technologists and Technicians (29-2000)	High	45	0.7%	108	1.7%	63	140.0%	47	0.7%	153	2.1%	106	225.5%
Healthcare Support Occupations (31-0000)	Low	167	2.8%	381	5.8%	214	128.1%	200	2.9%	453	6.1%	253	126.5%
Firefighting, Prevention, & Other Protective Svc Workers Incl. Spvsrs (33-2000)	Medium	87	1.4%	102	1.6%	15	17.2%	142	2.1%	156	2.1%	14	9.9%
Law Enforcement Workers Including Supervisors (33-3000)	Medium	18	0.3%	11	0.2%	(7)	(38.9%)	-	0.0%	94	1.3%	94	-
Food Preparation and Serving Related Occupations (35-0000)	Low	501	8.3%	688	10.5%	187	37.3%	771	11.2%	740	10.0%	(31)	(4.0%)
Building and Grounds Cleaning and Maintenance Occupations (37-0000)	Low	566	9.4%	498	7.6%	(68)	(12.0%)	600	8.7%	495	6.7%	(105)	(17.5%)
Personal Care and Service Occupations (39-0000)	Low	361	6.0%	180	2.8%	(181)	(50.1%)	356	5.2%	425	5.7%	69	19.4%
Sales and Related Occupations (41-0000)	Low	471	7.8%	659	10.1%	188	39.9%	648	9.4%	628	8.5%	(20)	(3.1%)
Office and Administrative Support Occupations (43-0000)	Low	773	12.9%	655	10.0%	(118)	(15.3%)	967	14.0%	958	12.9%	(9)	(0.9%)
Farming, Fishing, and Forestry Occupations (45-0000)	Low	52	0.9%	94	1.4%	42	80.8%	72	1.0%	73	1.0%	1	1.4%
Construction and Extraction Occupations (47-0000)	Medium	512	8.5%	812	12.4%	300	58.6%	604	8.7%	426	5.7%	(178)	(29.5%)
Installation, Maintenance, and Repair Occupations (49-0000)	Medium	190	3.2%	240	3.7%	50	26.3%	330	4.8%	367	4.9%	37	11.2%
Production Occupations (51-0000)	Low	760	12.7%	504	7.7%	(256)	(33.7%)	450	6.5%	577	7.8%	127	28.2%
Transportation and Material Moving Occupations (53-0000)	Low	589	9.8%	760	11.6%	171	29.0%	637	9.2%	734	9.9%	97	15.2%
Civilian Employed Population 16 Years and Over		6,005	100.0%	6,534	100.0%	529	8.8%	6,905	100.0%	7,430	100.0%	525	7.6%

occupation sa

Source: US Census Bureau, 2010 and 2018 ACS 5-Year Estimates Subject Tables (TableID: S24C)

- [1] Employment by industry includes jobs which pay wages or salaries, regardless of hours worked, and does not include those who are self-employed, working unpaid for a family business or farm, or private or household workers.
- [2] Levels of training by occupations are based on information provided by O*NET, a source on key characteristics of workers and occupations utilized by US Bureau of Labor Statistics. Low training level = some on-the-job training and high school-level education; Medium training level = considerable on-the-job training, vocational education, or Associate's degree; High training level = four-year degree or above plus work experience.

**Table A-5
Stockton Boulevard Specific Plan
Social and Economic Context
Jobs by Industry (2010 - 2018)**

Area Jobs by Industry (2010 - 2018)

Item	Study Area								City of Sacramento					
	2010		2018		Change		2018 as % of		2010		2018		Change	
	Total	% of Total	Total	% of Total	Total	%	City	County	Total	% of Total	Total	% of Total	Total	%
Employment By Industry (NAICS)														
Ag., Forestry, Fishing and Hunting (11)	29	0.1%	17	0.1%	(12)	(41.4%)	8.8%	0.7%	160	0.1%	194	0.1%	34	21.3%
Mining, Quarrying, Oil & Gas Extr. (21)	0	0.0%	0	0.0%	0	-	0.0%	0.0%	11	0.0%	18	0.0%	7	63.6%
Utilities (22)	2,382	8.2%	3,459	11.1%	1,077	45.2%	65.5%	54.0%	3,807	1.3%	5,284	1.7%	1,477	38.8%
Construction (23)	447	1.5%	527	1.7%	80	17.9%	4.0%	1.4%	8,199	2.9%	13,054	4.1%	4,855	59.2%
Manufacturing (31-33)	779	2.7%	583	1.9%	(196)	(25.2%)	6.5%	2.7%	8,027	2.8%	9,003	2.8%	976	12.2%
Wholesale Trade (42)	260	0.9%	163	0.5%	(97)	(37.3%)	1.7%	0.9%	7,406	2.6%	9,719	3.1%	2,313	31.2%
Retail Trade (44-45)	1,757	6.0%	2,040	6.5%	283	16.1%	10.6%	3.3%	16,759	5.9%	19,214	6.0%	2,455	14.6%
Transportation and Warehousing (48-49)	380	1.3%	331	1.1%	(49)	(12.9%)	4.4%	1.9%	7,141	2.5%	7,597	2.4%	456	6.4%
Information (51)	389	1.3%	232	0.7%	(157)	(40.4%)	5.8%	2.4%	5,283	1.8%	4,024	1.3%	(1,259)	(23.8%)
Finance and Insurance (52)	174	0.6%	116	0.4%	(58)	(33.3%)	1.8%	0.4%	5,834	2.0%	6,481	2.0%	647	11.1%
Real Estate and Rental Leasing (53)	108	0.4%	163	0.5%	55	50.9%	4.5%	1.7%	3,180	1.1%	3,617	1.1%	437	13.7%
Prof., Scientific, and Tech. Services (54)	250	0.9%	162	0.5%	(88)	(35.2%)	0.9%	0.4%	16,333	5.7%	18,451	5.8%	2,118	13.0%
Mgmt of Companies and Enterprises (55)	9	0.0%	11	0.0%	2	22.2%	0.4%	0.1%	2,239	0.8%	3,084	1.0%	845	37.7%
Admin., Support & Waste Mgmt Svcs (56)	887	3.0%	936	3.0%	49	5.5%	3.8%	1.9%	13,899	4.9%	24,455	7.7%	10,556	75.9%
Educational Services (61)	4,313	14.8%	4,097	13.1%	(216)	(5.0%)	20.4%	7.7%	17,289	6.0%	20,099	6.3%	2,810	16.3%
Health Care and Social Assistance (62)	9,201	31.5%	13,536	43.3%	4,335	47.1%	24.7%	11.9%	34,293	12.0%	54,866	17.2%	20,573	60.0%
Arts, Entertainment, and Recreation (71)	155	0.5%	245	0.8%	90	58.1%	5.2%	2.5%	3,994	1.4%	4,706	1.5%	712	17.8%
Accommodation and Food Services (72)	1,101	3.8%	1,946	6.2%	845	76.7%	7.7%	3.4%	18,869	6.6%	25,197	7.9%	6,328	33.5%
Other Services (except Public Admin.) (81)	2,479	8.5%	438	1.4%	(2,041)	(82.3%)	4.1%	2.0%	17,076	6.0%	10,809	3.4%	(6,267)	(36.7%)
Administrative Government (9A & 9B)	4,111	14.1%	2,267	7.2%	(1,844)	(44.9%)	2.9%	2.2%	96,111	33.6%	78,209	24.6%	(17,902)	(18.6%)
Total Employment	29,211	100.0%	31,269	100.0%	2,058	7.0%	9.8%		285,910	100.0%	318,081	100.0%	32,171	11.3%

Source: U.S. Census OnTheMap 2010, 2018; EPS.

Table A-5
Stockton Boulevard Specific Plan
Social and Economic Context
Jobs by Industry (2010 - 2018)

Area Jobs by Industry (2010 - 2018)

Item	Sacramento County					
	2010		2018		Change	
	Total	% of Total	Total	% of Total	Total	%
Employment By Industry (NAICS)						
Ag., Forestry, Fishing and Hunting (11)	2,079	0.4%	2,446	0.4%	367	17.7%
Mining, Quarrying, Oil & Gas Extr. (21)	192	0.0%	209	0.0%	17	8.9%
Utilities (22)	5,047	0.9%	6,402	0.9%	1,355	26.8%
Construction (23)	23,293	4.0%	38,708	5.7%	15,415	66.2%
Manufacturing (31-33)	23,004	3.9%	21,203	3.1%	(1,801)	(7.8%)
Wholesale Trade (42)	15,648	2.7%	18,978	2.8%	3,330	21.3%
Retail Trade (44-45)	52,597	9.0%	61,566	9.1%	8,969	17.1%
Transportation and Warehousing (48-49)	12,245	2.1%	17,538	2.6%	5,293	43.2%
Information (51)	11,265	1.9%	9,488	1.4%	(1,777)	(15.8%)
Finance and Insurance (52)	25,280	4.3%	25,889	3.8%	609	2.4%
Real Estate and Rental Leasing (53)	7,906	1.4%	9,677	1.4%	1,771	22.4%
Prof., Scientific, and Tech. Services (54)	37,310	6.4%	44,300	6.6%	6,990	18.7%
Mgmt of Companies and Enterprises (55)	9,338	1.6%	10,157	1.5%	819	8.8%
Admin., Support & Waste Mgmt Svcs (56)	34,808	6.0%	50,336	7.5%	15,528	44.6%
Educational Services (61)	50,730	8.7%	52,988	7.9%	2,258	4.5%
Health Care and Social Assistance (62)	69,149	11.9%	114,127	16.9%	44,978	65.0%
Arts, Entertainment, and Recreation (71)	8,811	1.5%	9,860	1.5%	1,049	11.9%
Accommodation and Food Services (72)	42,014	7.2%	57,182	8.5%	15,168	36.1%
Other Services (except Public Admin.) (81)	36,121	6.2%	22,271	3.3%	(13,850)	(38.3%)
Administrative Government (9A & 9B)	116,579	20.0%	100,925	15.0%	(15,654)	(13.4%)
Total Employment	583,416	100.0%	674,250	100.0%	90,834	15.6%

jobs

Source: U.S. Census OnTheMap 2010, 2018; EPS.

Table A-6
Stockton Boulevard Specific Plan
Social and Economic Context
Jobs by Industry, Subareas (2010 - 2018)

Area Jobs by Industry, Subareas
(2010 - 2018)

Industry (NAICS) [1]	Elmhurst						Oak Park					
	2010		2018		Change		2010		2018		Change	
	Total	Share	Total	Share	Total	%	Total	Share	Total	Share	Total	%
Employment By Industry (NAICS)												
Ag., Forestry, Fishing and Hunting (11)	0	0.0%	0	0.0%	0	-	29	0.9%	16	0.5%	(13)	(44.8%)
Mining, Quarrying, Oil & Gas Extr. (21)	0	0.0%	0	0.0%	0	-	0	0.0%	0	0.0%	0	-
Utilities (22)	2,362	14.6%	3,459	19.9%	1,097	46.4%	1	0.0%	0	0.0%	(1)	(100.0%)
Construction (23)	57	0.4%	195	1.1%	138	242.1%	85	2.6%	35	1.2%	(50)	(58.8%)
Manufacturing (31-33)	118	0.7%	42	0.2%	(76)	(64.4%)	405	12.2%	298	10.1%	(107)	(26.4%)
Wholesale Trade (42)	90	0.6%	3	0.0%	(87)	(96.7%)	48	1.4%	38	1.3%	(10)	(20.8%)
Retail Trade (44-45)	144	0.9%	177	1.0%	33	22.9%	183	5.5%	290	9.8%	107	58.5%
Transportation and Warehousing (48-49)	260	1.6%	196	1.1%	(64)	(24.6%)	8	0.2%	8	0.3%	0	0.0%
Information (51)	171	1.1%	39	0.2%	(132)	(77.2%)	5	0.2%	8	0.3%	3	60.0%
Finance and Insurance (52)	31	0.2%	0	0.0%	(31)	(100.0%)	40	1.2%	48	1.6%	8	20.0%
Real Estate and Rental Leasing (53)	14	0.1%	18	0.1%	4	28.6%	14	0.4%	39	1.3%	25	178.6%
Prof., Scientific, and Tech. Services (54)	79	0.5%	10	0.1%	(69)	(87.3%)	49	1.5%	56	1.9%	7	14.3%
Mgmt of Companies and Enterprises (55)	4	0.0%	0	0.0%	(4)	(100.0%)	1	0.0%	0	0.0%	(1)	(100.0%)
Admin., Support & Waste Mgmt Svcs (56)	183	1.1%	180	1.0%	(3)	(1.6%)	141	4.2%	94	3.2%	(47)	(33.3%)
Educational Services (61)	535	3.3%	601	3.5%	66	12.3%	689	20.8%	494	16.7%	(195)	(28.3%)
Health Care and Social Assistance (62)	7,897	49.0%	9,992	57.5%	2,095	26.5%	540	16.3%	1,152	39.0%	612	113.3%
Arts, Entertainment, and Recreation (71)	1	0.0%	3	0.0%	2	200.0%	54	1.6%	0	0.0%	(54)	(100.0%)
Accommodation and Food Services (72)	273	1.7%	349	2.0%	76	27.8%	84	2.5%	268	9.1%	184	219.0%
Other Services (except Public Admin.) (81)	375	2.3%	16	0.1%	(359)	(95.7%)	460	13.9%	108	3.7%	(352)	(76.5%)
Administrative Government (9A & 9B)	0	0.0%	0	0.0%	0	-	0	0.0%	0	0.0%	0	-
Total Employment	16,124	100.0%	17,368	100.0%	1,244	7.7%	3,320	100.0%	2,952	100.0%	(368)	(11.1%)

Source: U.S. Census OnTheMap 2010, 2018; EPS.

Table A-6
Stockton Boulevard Specific Plan
Social and Economic Context
Jobs by Industry, Subareas (2010 - 2018)

Area Jobs by Industry, Subareas
(2010 - 2018)

Industry (NAICS) [1]	Fruitridge Pocket						Tahoe Park					
	2010		2018		Change		2010		2018		Change	
	Total	Share	Total	Share	Total	%	Total	Share	Total	Share	Total	%
Employment By Industry (NAICS)												
Ag., Forestry, Fishing and Hunting (11)	0	0.0%	0	0.0%	0	-	0	0.0%	1	0.0%	1	-
Mining, Quarrying, Oil & Gas Extr. (21)	0	0.0%	0	0.0%	0	-	0	0.0%	0	0.0%	0	-
Utilities (22)	11	0.9%	0	0.0%	(11)	(100.0%)	3	0.1%	0	0.0%	(3)	(100.0%)
Construction (23)	6	0.5%	17	1.2%	11	183.3%	229	9.0%	161	5.9%	(68)	(29.7%)
Manufacturing (31-33)	19	1.5%	15	1.1%	(4)	(21.1%)	223	8.7%	221	8.1%	(2)	(0.9%)
Wholesale Trade (42)	10	0.8%	3	0.2%	(7)	(70.0%)	66	2.6%	90	3.3%	24	36.4%
Retail Trade (44-45)	359	27.7%	299	21.3%	(60)	(16.7%)	144	5.6%	225	8.3%	81	56.3%
Transportation and Warehousing (48-49)	2	0.2%	0	0.0%	(2)	(100.0%)	60	2.3%	77	2.8%	17	28.3%
Information (51)	161	12.4%	167	11.9%	6	3.7%	39	1.5%	18	0.7%	(21)	(53.8%)
Finance and Insurance (52)	8	0.6%	18	1.3%	10	125.0%	16	0.6%	12	0.4%	(4)	(25.0%)
Real Estate and Rental Leasing (53)	7	0.5%	19	1.4%	12	171.4%	14	0.5%	29	1.1%	15	107.1%
Prof., Scientific, and Tech. Services (54)	20	1.5%	0	0.0%	(20)	(100.0%)	73	2.9%	69	2.5%	(4)	(5.5%)
Mgmt of Companies and Enterprises (55)	0	0.0%	0	0.0%	0	-	3	0.1%	1	0.0%	(2)	(66.7%)
Admin., Support & Waste Mgmt Svcs (56)	22	1.7%	11	0.8%	(11)	(50.0%)	360	14.1%	534	19.6%	174	48.3%
Educational Services (61)	195	15.1%	152	10.8%	(43)	(22.1%)	448	17.5%	239	8.8%	(209)	(46.7%)
Health Care and Social Assistance (62)	60	4.6%	386	27.5%	326	543.3%	386	15.1%	572	21.0%	186	48.2%
Arts, Entertainment, and Recreation (71)	0	0.0%	1	0.1%	1	-	0	0.0%	2	0.1%	2	-
Accommodation and Food Services (72)	175	13.5%	271	19.3%	96	54.9%	134	5.2%	266	9.8%	132	98.5%
Other Services (except Public Admin.) (81)	227	17.5%	47	3.3%	(180)	(79.3%)	321	12.6%	47	1.7%	(274)	(85.4%)
Administrative Government (9A & 9B)	0	0.0%	0	0.0%	0	-	0	0.0%	0	0.0%	0	-
Total Employment	1,294	100.0%	1,406	100.0%	112	8.7%	2,555	100.0%	2,720	100.0%	165	6.5%

Source: U.S. Census OnTheMap 2010, 2018; EPS.

Table A-6
Stockton Boulevard Specific Plan
Social and Economic Context
Jobs by Industry, Subareas (2010 - 2018)

Area Jobs by Industry, Subareas
(2010 - 2018)

Industry (NAICS) [1]	Lemon Hill						South of Fruitridge					
	2010		2018		Change		2010		2018		Change	
	Total	Share	Total	Share	Total	%	Total	Share	Total	Share	Total	%
Employment By Industry (NAICS)												
Ag., Forestry, Fishing and Hunting (11)	0	0.0%	0	0.0%	0	-	0	0.0%	0	0.0%	0	-
Mining, Quarrying, Oil & Gas Extr. (21)	0	0.0%	0	0.0%	0	-	0	0.0%	0	0.0%	0	-
Utilities (22)	2	0.1%	0	0.0%	(2)	(100.0%)	3	0.1%	0	0.0%	(3)	(100.0%)
Construction (23)	44	1.2%	90	2.2%	46	104.5%	26	1.1%	29	1.1%	3	11.5%
Manufacturing (31-33)	4	0.1%	0	0.0%	(4)	(100.0%)	10	0.4%	7	0.3%	(3)	(30.0%)
Wholesale Trade (42)	22	0.6%	17	0.4%	(5)	(22.7%)	24	1.0%	12	0.4%	(12)	(50.0%)
Retail Trade (44-45)	403	11.2%	552	13.3%	149	37.0%	524	22.5%	497	18.6%	(27)	(5.2%)
Transportation and Warehousing (48-49)	39	1.1%	41	1.0%	2	5.1%	11	0.5%	9	0.3%	(2)	(18.2%)
Information (51)	9	0.3%	0	0.0%	(9)	(100.0%)	4	0.2%	0	0.0%	(4)	(100.0%)
Finance and Insurance (52)	34	0.9%	13	0.3%	(21)	(61.8%)	45	1.9%	25	0.9%	(20)	(44.4%)
Real Estate and Rental Leasing (53)	20	0.6%	10	0.2%	(10)	(50.0%)	39	1.7%	48	1.8%	9	23.1%
Prof., Scientific, and Tech. Services (54)	17	0.5%	2	0.0%	(15)	(88.2%)	12	0.5%	25	0.9%	13	108.3%
Mgmt of Companies and Enterprises (55)	0	0.0%	0	0.0%	0	-	1	0.0%	10	0.4%	9	900.0%
Admin., Support & Waste Mgmt Svcs (56)	123	3.4%	33	0.8%	(90)	(73.2%)	58	2.5%	84	3.1%	26	44.8%
Educational Services (61)	2,137	59.5%	2,219	53.4%	82	3.8%	309	13.3%	392	14.7%	83	26.9%
Health Care and Social Assistance (62)	101	2.8%	647	15.6%	546	540.6%	217	9.3%	787	29.5%	570	262.7%
Arts, Entertainment, and Recreation (71)	100	2.8%	235	5.7%	135	135.0%	0	0.0%	4	0.1%	4	-
Accommodation and Food Services (72)	23	0.6%	164	3.9%	141	613.0%	412	17.7%	628	23.5%	216	52.4%
Other Services (except Public Admin.) (81)	482	13.4%	106	2.6%	(376)	(78.0%)	614	26.4%	114	4.3%	(500)	(81.4%)
Administrative Government (9A & 9B)	0	0.0%	0	0.0%	0	-	0	0.0%	0	0.0%	0	-
Total Employment	3,592	100.0%	4,152	100.0%	560	15.6%	2,326	100.0%	2,671	100.0%	345	14.8%

jobs sa

Source: U.S. Census OnTheMap 2010, 2018; EPS.

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APPENDIX B:

Future Demand: Housing and Retail

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**Table B-1
Stockton Boulevard Specific Plan
Social and Economic Context
Aggie Square Planned Land Uses**

Item	Total Project Land Uses [1]		
	Total Building Sq. Ft.	Total Dwelling Units	Total Hotel Rooms
Aggie Square Land Use Category			
Science and Technology Use	743,657		
Co-working Space	123,033	-	-
University Research	472,414	-	-
University Offices and Classrooms	129,412	-	-
Data Sciences	120,924	-	-
Community Serving Retail	24,000	-	-
Alice Waters Education	12,000	-	-
UC Catering	12,000	-	-
Rehab Hospital	53,000	-	-
Garage [2]	360,400	-	-
On-site Residential	203,000	281	-
Off-site Residential	-	300	-
Hotel	187,500	-	250
Total	2,441,340	581	250

Source: University of California, Davis; Wexford Science and Technology; EPS.

[1] Building square footages reflect the estimated net rentable square footage, totals may differ because of non-leasable space.

[2] The Garage total does not include the square footage of a second 1,200-parking-stall garage.

**Table B-2
Stockton Boulevard Specific Plan
Social and Economic Context
Summary of Current Pipeline Projects in the Study Area**

Project	Project Size		Proposed Land Use	Status
	Dwelling Units	Nonresidential Square Feet		
STUDY SUBAREA				
Elmhurst				
Aggie Square Mixed Use Project	581	2,238,340	See Table B-1 Single-unit Dwellings; Multi-unit	EIFD application in progress
SMUD 59th Street Reuse	496	9,940	Dwellings; Commercial	Preliminary Stages / Developer Selection
The Gio	213	4,300	Multi-unit Dwellings; Retail; Office	Completed in 2020
The Grounds at Tahoe Park	44	-	Single-unit Dwellings	Under Construction - built on spec
4315 V St	2	-	Multi-unit Dwelling	Review in progress
Subtotal Elmhurst	1,336	2,252,580		
Oak Park				
4601-4625 10th Ave	99	-	Multi-unit Dwellings	Proposed
3204-3206 Broadway Mixed Use	21	2,000	Multi-unit Dwellings; Commercial	Approved
3/36 Mixed use	12	2,500	Multi-unit Dwellings; Commercial	Plans submitted
4421 4th Ave	7	6,098	Multi-unit Dwellings; Commercial	Review in progress
Element Hotel	0	103,208	Hotel	Review in progress
Subtotal Oak Park	139	113,806		
Tahoe & Colonial				
4722 Ninth Ave	130	3,300	Multi-unit Dwellings; Retail	Proposed
4831 64th St	22	-	Single-unit Dwellings	Proposed
Subtotal Tahoe & Colonial	152	3,300		
Lemon Hill				
5700 Stockton Blvd Affordable Project	116	2,500	Multi-unit Dwellings; Single-unit Dwellings; Commercial	Proposed
South of Fruitridge				
6450 Lemon Hill Mixed Use	28	20,000	Multi-unit Dwellings; Commercial	Waiting for Review
TOTAL DWELLING UNITS / NONRES. SQ FT	1,771	2,392,186		
TOTAL DWELLING UNITS / NONRES. SQ FT (EXCLUDING THE GIO)	1,558	2,387,886		

Source: City of Sacramento; Sacramento Business Journal; Sacramento Bee; EPS.

Table B-3
Stockton Boulevard Specific Plan
Social and Economic Context
Sacramento County Income Limits (2020 in 2020\$)

Income Level	% of AMI	Sacramento County Income Limits Based on HH Size:		
		2	3 [1]	4
Extremely Low	≤ 30% AMI	\$20,750	\$23,350	\$26,200
Very Low Income	>30% to ≤50% AMI	\$34,550	\$38,850	\$43,150
Low Income	>50% to ≤80% AMI	\$55,250	\$62,150	\$69,050
Median Income	>80% to ≤100% AMI	\$69,050	\$77,650	\$86,300
Moderate Income	>100% AMI to ≤120% AMI	\$82,950	\$93,200	\$103,550

limits

Source: United States Department of Housing and Urban Development FY 2020 Income Limits; State of California Department of Housing and Community Development, "State Income Limits for 2020"; EPS.

[1] The average persons per household for the City of Sacramento is 2.78 per the 2018 ACS.

Table B-4
Stockton Boulevard Specific Plan
Social and Economic Context
Estimated Housing Unit Value Based on Income and Housing Costs in Sacramento County (2020 in 2020\$)

Item	Annual Income [1]	Estimated Housing Costs		Monthly Mortgage Cost	Loan Amount	Estimated Unit Value
		Annual	Monthly [2]			
Assumptions						
Maximum Monthly Housing Cost as % of Income [3]	35.00%	A				
Mortgage Term (In Years) [4]	30	B				
Mortgage Interest Rate [5]	4.00%	C				
Down Payment as a % of Unit Value	5.00%	D				
<i>Formula</i>	<i>E</i>	<i>F = A * E</i>	<i>G = F / 12</i>	<i>H = G * 61%</i>	<i>I (see above assumptions B & C)</i>	<i>J = I / (1 - D)</i>
Income Level						
Extremely Low	\$23,350	\$8,173	\$681	\$418	\$87,534	\$92,141
Very Low Income	\$38,850	\$13,598	\$1,133	\$695	\$145,639	\$153,305
Low Income	\$62,150	\$21,753	\$1,813	\$1,112	\$232,986	\$245,248
Median Income	\$77,650	\$27,178	\$2,265	\$1,390	\$291,092	\$306,412
Moderate Income	\$93,200	\$32,620	\$2,718	\$1,668	\$349,385	\$367,773

Source: Freddie Mac; City of Sacramento Municipal Code Chapter 17.712; EPS.

- [1] EPS assumes a household size of 3, rounding up the average persons per household for the City of Sacramento. Refer to Table B-3 for income limits.
- [2] Refer to Table B-5 for detailed monthly costs calculation.
- [3] Per the City of Sacramento's Mixed Housing Income Ordinance in Municipal Code Chapter 17.712, qualification for affordable housing prices shall be based on no more than 35% of income being applied to housing expenses.
- [4] Based on a 30-year fixed-rate conventional mortgage.
- [5] Interest rate are based on the average for 30-year fixed-rates from 2010 to 2020 per Freddie Mac.

Table B-5
Stockton Boulevard Specific Plan
Social and Economic Context
Estimated Monthly Housing Costs By Category in Sacramento County (2020 in 2020\$)

Item	Assumptions	Estimated Monthly Cost			Total
		Mortgage Payment	Mortgage Insurance	Taxes and Insurance	
Annual Property Taxes and Homeowners Insurance	2.00%				
Mortgage Insurance as a % of Loan Amt. [1]	1.50%				
Income Level	<u>Annual Income [2]</u>				
Extremely Low	\$23,350	\$418	\$109	\$154	\$681
Very Low Income	\$38,850	\$695	\$182	\$256	\$1,133
Low Income	\$62,150	\$1,112	\$291	\$409	\$1,812
Median Income	\$77,650	\$1,390	\$364	\$511	\$2,265
Moderate Income	\$93,200	\$1,668	\$437	\$613	\$2,718

Source: Realtor.com; Zillow; bankrate.com; wellsfargo.com; chase.com; nerwallet.com; EPS.

[1] Mortgage insurance rate is based on an average of the estimated range of 0.55% - 2.25%. Rates are based on credit and down payment amounts.

[2] Refer to Table 2 for income limits.

**Table B-6
Stockton Boulevard Specific Plan
Social and Economic Context
Estimated Study Area Household Retail Spending (2018\$)**

**Current Study Area
Household Spending**

Item	Percentage Spent on Retail by Category [1]	Total Annual Retail Spending per Household [2]
Assumptions		
Median Household Income [3]	\$44,694	
Estimated Percent of HH Income Spent in Retail Stores [4]	45%	
Estimated Annual HH Spending in Retail Stores	\$20,075	
Retail and Food Services		
Motor Vehicle and Parts Dealers [6]	4.1%	\$821
Home Furnishings and Appliance Stores	7.8%	\$1,557
Bldg. Matrl. and Garden Equip. and Supplies	5.0%	\$995
Food and Beverage Stores	21.9%	\$4,397
Gasoline Stations	10.0%	\$2,000
Clothing and Clothing Accessories Stores	7.5%	\$1,513
General Merchandise Stores	15.5%	\$3,119
Food Services and Drinking Places	19.5%	\$3,920
Other Retail	8.7%	\$1,754
Total Retail and Food Services	100.0%	\$20,075

Source: EPS.

NOTE: FIGURES MAY NOT TOTAL BECAUSE OF ROUNDING.

[1] See Table B-7 for estimated spending by retail category.

[2] Total Study Area spending is derived by multiplying the estimated Study Area average household income of \$44,694 by the estimated percentage of household income spent on retail of 45% and then multiplied by the percentages spent on retail for

[3] See Table 4-2.

[4] See Table B-9. Excludes spending on e-commerce retail goods and services.

[5] Percentage spent on Motor Vehicles and Parts Dealers only pertains to motor vehicle parts.

[6]

Table B-7
Stockton Boulevard Specific Plan
Social and Economic Context
United States Consumer Expenditures (2019\$)

Retail and Food Services	Total Spending on Retail (in 000's) [1]	% Spent on E-Commerce [2]	Adjusted Spending at Retail Stores (in 000's)	Adj. % of Spending at Retail Stores by Retail Category
Motor Vehicle and Parts Dealers [3]	\$333,741,275	3.0%	\$323,681,589	4.1%
Home Furnishings and Appliance Stores	\$789,390,299	22.3%	\$613,528,249	7.8%
Bldg. Matrl. and Garden Equip. and Supplies	\$406,735,421	3.6%	\$391,933,231	5.0%
Food and Beverage Stores	\$1,746,968,141	0.8%	\$1,732,333,860	21.9%
Gasoline Stations	\$787,885,265	0.0%	\$787,885,265	10.0%
Clothing and Clothing Accessories Stores	\$708,494,725	15.9%	\$595,983,872	7.5%
General Merchandise Stores	\$1,298,468,028	5.3%	\$1,229,032,975	15.5%
Food Services and Drinking Places	\$1,544,541,077	0.0%	\$1,544,541,077	19.5%
Other Retail	\$719,782,480	4.0%	\$691,043,377	8.7%
Total	\$8,336,006,712		\$7,909,963,496	100.0%

Source: U.S. Bureau of Labor Statistics, "Table 1203. Income before taxes: Annual expenditure means, shares, standard errors, and coefficients of variation, Consumer Expenditure Survey, 2019"; U.S. Retail Trade Sales - Total and E-commerce (2017-2018); Sales for U.S. Electronic Shopping and Mail-Order Houses (NAICS 4541) - Total and E-commerce by Primary Business Activity (2015-2018); EPS.

[1] Data per the Bureau of Labor Statistics, Consumer Expenditure Survey 2019 released September 2020. See Table B-10 through Table B-12.

[2] Based on the following 2018 U.S. Census reports regarding e-commerce: U.S. Retail Trade Sales - Total and E-commerce; and, Sales for U.S. Electronic Shopping and Mail-Order Houses (NAICS 4541) - Total and E-commerce by Primary Business Activity (2015-2018).

[3] Motor vehicles and parts is based on the sales from auto parts stores only and excludes new and used motor vehicle dealers. See Table B-10 through Table B-12 for details on how motor vehicle sales were excluded.

**Table B-8
Stockton Boulevard Specific Plan
Social and Economic Context
Total and Taxable Retail Sales per Square Feet (2019\$)**

Item	Total Retail Sales per Square Foot							
	Original Data [see Note]	Escalated Data (2019\$) [1]	Total Retail Sales by Shopping Center Type					
			Neighborhood		Community		Regional	
			% [2]	No.	% [2]	No.	% [2]	No.
Total Retail Sales per Square Foot								
Motor Vehicle and Parts Dealers [3]	\$250	\$273	3%	\$8	2%	\$5	1%	\$3
Home Furnishings and Appliance Stores	\$525	\$573	0%	\$0	7%	\$40	10%	\$57
Bldg. Matrl. and Garden Equip. and Supplies	\$356	\$389	0%	\$0	15%	\$58	1%	\$4
Food and Beverage Stores [4]	-	\$565	55%	\$311	24%	\$136	3%	\$17
Gasoline Stations [5]	\$1,321	\$1,626	1%	\$16	2%	\$33	1%	\$16
Clothing and Clothing Accessories Stores	\$370	\$404	2%	\$8	5%	\$20	20%	\$81
General Merchandise Stores	\$360	\$393	5%	\$20	20%	\$79	20%	\$79
Food Services and Drinking Places	\$492	\$537	8%	\$43	10%	\$54	20%	\$107
Other Retail	\$209	\$228	12%	\$27	7%	\$16	18%	\$41
Nonretail [6]	NA	\$0	14%	\$0	8%	\$0	6%	\$0
Total			100%	\$430	100%	\$440	100%	\$410
Taxable Retail Sales per Square Foot by Retail Center Type								
Percent Taxable by Shopping Center Type [7]				44%		54%		98%
Taxable Sales per Square Foot (Rounded)				\$190		\$240		\$400

Note: Original data is based on an average of multiple sources and is presented in 2016\$ unless noted otherwise in footnotes.

Source: BizMiner 2016; ULI Dollars & Cents 2008; State of California Board of Equalization (BOE) Publication 61; Bureau of Labor Statistics, "CPI-All Urban Consumers (Current Series) - West Urban"; RetailSails http://retailsails.files.wordpress.com/2011/09/rs_spsf.pdf; eMarketer pulled February 2019; respective annual 10-K reports; EPS.

[1] Sales adjusted to year-end 2019 based on the Consumer Price Index, All items in West urban, all urban consumers, not seasonally adjusted:

Year	CPI	Adjustment to 2019\$
2008	219.65	23.1%
2016	247.71	9.1%
2018	263.26	2.7%
2019	270.35	0.0%

[2] Reflects percentage of total square footage by retail category by retail center type, estimated based on ULI's Dollars & Cents 2008

[3] Reflects motor vehicle parts only; excludes taxable sales per square foot for dealerships.

[4] Sales per square foot for Food and Beverage stores estimated based on the averages from BizMiner, RetailSales, eMarketer, and annual 10-K reports, escalated to 2019\$.

[5] Estimated using ULI's Dollars & Cents, 2008, escalated to 2019\$.

[6] Included to account for non-taxable retail space occupants, such as services.

[7] Based on BOE Publication 61, March 2018.

Table B-9
Stockton Boulevard Specific Plan
Social and Economic Context
U.S. Household Income Spent on Retail (2019 in 2019\$)

Household Income Range	Average HH Income	Estimated Total Amount Spent on Retail [1]	% of Total Spent on E-Commerce [2]	Total Est. Amount Spent on E-Commerce	Adjusted Amount Spent at Retail Stores	Adjusted % of HH Income Spent at Retail Stores
<i>Formula</i>	<i>A</i>	<i>B</i>	<i>C</i>	<i>D = B * C</i>	<i>E = B - D</i>	<i>F = E / A</i>
All Households	\$82,852	\$26,549	8.2%	\$2,177	\$24,372	29%
\$30,000 - \$39,999	\$34,772	\$18,698	5.8%	\$1,080	\$17,618	51%
\$40,000 - \$49,000	\$44,831	\$21,574	6.7%	\$1,438	\$20,136	45%
\$50,000 - \$69,999	\$59,328	\$24,461	7.6%	\$1,848	\$22,613	38%
\$70,000 - \$99,999	\$83,558	\$28,856	8.9%	\$2,572	\$26,284	31%
\$100,000 - \$149,999	\$121,433	\$35,369	10.9%	\$3,864	\$31,505	26%
\$150,000 - \$199,999	\$171,061	\$46,583	14.4%	\$6,702	\$39,881	23%

Source: U.S. Bureau of Labor Statistics, "Table 1203. Income before taxes: Annual expenditure means, shares, standard errors, and coefficients of variation, Consumer Expenditure Survey, 2017"; U.S. Census Bureau Monthly Retail Trade Survey, "Estimated Quarterly U.S. Retail Sales: Total and E-commerce"; EPS.

[1] Retail comprises the categories most closely matched with those given by the State of California Board of Equalization.

[2] Based on the U.S. Census Bureau Monthly Retail Trade Survey, "Estimated Quarterly U.S. Retail Sales (Not Adjusted): Total and E-commerce." Similar e-commerce spending data by income level is not available at the State level or lower. Percentages for income spent on e-commerce are adjusted relative to average amount spent on retail for each income category.

Table B-10
Stockton Boulevard Specific Plan
Social and Economic Context
Consumer Expenditure Patterns by Income Bracket Summary (2019\$)

Item	All Consumer Units	Income Bracket								
		<\$15K	\$15K- \$30K	\$30K- \$40K	\$40K- \$50K	\$50K- \$70K	\$70K- \$100K	\$100K- \$150K	\$150K- \$200K	>200K
Consumer Units in Survey (in thousands)	132,242	15,848	19,856	12,991	11,208	17,470	19,119	18,225	8,266	9,260
Percentage of Total	100%	12%	15%	10%	8%	13%	14%	14%	6%	7%
Annual Income before Taxes	\$82,852	\$7,574	\$22,189	\$34,772	\$44,831	\$59,328	\$83,558	\$121,433	\$171,061	\$343,498
Annual Income after Taxes	\$71,487	\$7,743	\$22,672	\$34,981	\$42,723	\$55,500	\$75,811	\$106,439	\$144,046	\$258,975
Avg. Annual Expenditures	\$63,036	\$26,194	\$34,201	\$40,942	\$47,299	\$54,212	\$66,801	\$84,994	\$109,020	\$160,318
Expenditures as a Percentage of Pretax Income	76%	346%	154%	118%	106%	91%	80%	70%	64%	47%
Taxable Expenditures [1]	\$19,510	\$8,155	\$10,748	\$13,087	\$15,301	\$17,987	\$21,328	\$26,374	\$33,567	\$43,497
Percentage of Total Expenditures	31%	31%	31%	32%	32%	33%	32%	31%	31%	27%
Taxable Expenditures as a Percentage of Pretax Income	24%	108%	48%	38%	34%	30%	26%	22%	20%	13%

Source: Bureau of Labor Statistics, Consumer Expenditure Survey 2019, data released September 2020; EPS.

[1] Taxable expenditures includes 100% of BLS reported average annual expenditures in Food away from home; Alcoholic beverages; Other household expenses; Housekeeping supplies; Household furnishings and equipment; Apparel and Services for Men and boys, Women and girls, Children under 2 and Footwear; Vehicle purchases; Gasoline and motor oil; Medical supplies; Audio & visual equipment & services; Pets, toys, and playground equipment; Reading; Tobacco products and smoking supplies; Miscellaneous; and 50% and 25% of average annual expenditures in Drugs and Personal care products/services, respectively.

Table B-11
Stockton Boulevard Specific Plan
Social and Economic Context
Consumer Expenditure Patterns by Income Bracket (2019\$)

Taxable Expenditures	Retail Category	Total Surveyed	Income Bracket								
			<\$15K	\$15K-\$30K	\$30K-\$40K	\$40K-\$50K	\$50K-\$70K	\$70K-\$100K	\$100K-\$150K	\$150K-\$200K	>200K
100% Taxable											
Food away from home	FA	\$3,526	\$1,389	\$1,806	\$2,155	\$2,865	\$3,051	\$3,689	\$4,725	\$5,847	\$9,148
Alcoholic beverages	FA	\$579	\$184	\$229	\$372	\$410	\$427	\$616	\$872	\$1,042	\$1,618
Other household expenses	BM	\$1,081	\$476	\$687	\$772	\$859	\$915	\$1,109	\$1,301	\$1,672	\$2,959
Housekeeping supplies	GM	\$766	\$410	\$507	\$568	\$687	\$697	\$794	\$982	\$1,283	\$1,381
Household furnishings and equipment	HF	\$2,098	\$764	\$1,090	\$1,224	\$1,447	\$1,761	\$2,173	\$2,858	\$3,732	\$5,899
Apparel and Services [1]	CA	\$1,646	\$769	\$783	\$1,045	\$1,267	\$1,420	\$1,680	\$2,284	\$2,959	\$3,971
Vehicle purchases	MV	\$4,394	\$1,607	\$2,091	\$2,728	\$3,088	\$4,379	\$5,176	\$6,191	\$8,761	\$8,996
Gasoline and motor oil	GS	\$2,094	\$970	\$1,170	\$1,699	\$1,864	\$2,153	\$2,496	\$2,927	\$3,181	\$3,283
Medical supplies	OR	\$194	\$70	\$196	\$140	\$176	\$146	\$228	\$224	\$252	\$397
Audio & visual equipment & services	GM	\$1,000	\$534	\$725	\$815	\$821	\$954	\$1,061	\$1,371	\$1,421	\$1,701
Pets, toys, and playground equipment	OR	\$821	\$285	\$481	\$563	\$564	\$754	\$948	\$1,210	\$1,557	\$1,473
Reading	OR	\$92	\$53	\$78	\$54	\$96	\$77	\$94	\$118	\$117	\$181
Tobacco products and smoking supplies	OR	\$320	\$291	\$308	\$338	\$344	\$376	\$409	\$320	\$201	\$155
Miscellaneous	GM	\$899	\$353	\$597	\$614	\$813	\$877	\$855	\$991	\$1,542	\$2,335
50% Taxable											
Drugs	OR	\$486	\$273	\$372	\$516	\$444	\$473	\$505	\$557	\$706	\$725
25% Taxable											
Personal care products/services	GM	\$786	\$340	\$428	\$584	\$647	\$718	\$841	\$1,052	\$1,234	\$1,796
0% Taxable											
Food at home	FH	\$4,643	\$2,528	\$3,185	\$3,636	\$4,329	\$4,318	\$4,983	\$5,908	\$6,917	\$7,954
Other Apparel Products & Services	CA	\$237	\$93	\$129	\$148	\$133	\$166	\$219	\$281	\$478	\$835
Vehicle maintenance & repairs	MV	\$887	\$382	\$553	\$727	\$720	\$799	\$980	\$1,197	\$1,474	\$1,714
Total Retail expenditures		\$26,549	\$11,771	\$15,415	\$18,698	\$21,574	\$24,461	\$28,856	\$35,369	\$44,376	\$56,521
Expenditures as a Percent of Pretax Income		36%	150%	69%	54%	48%	41%	34%	29%	26%	18%
Total Retail expenditure excluding Vehicle Purchase		\$22,155									

Source: Bureau of Labor Statistics, Consumer Expenditure Survey 2019, data released September 2020; EPS.

[1] Excludes "other apparel products & services".

Table B-12
Stockton Boulevard Specific Plan
Social and Economic Context
Consumer Expenditure Patterns by Retail Category (2019\$)

Item	Consumer Expenditure Pattern by %	Total Expenditures by Retail Category
	<i>Table B-11</i>	<i>Table B-10 [1]</i>
Retail Category		
Motor Vehicle Parts Dealers	4.0%	\$333,741,275
Home Furnishings and Appliance Stores	9.5%	\$789,390,299
Bldg. Matrl. and Garden Equip. and Supplies	4.9%	\$406,735,421
Food and Beverage Stores	21.0%	\$1,746,968,141
Gasoline Stations	9.5%	\$787,885,265
Clothing and Clothing Accessories Stores	8.5%	\$708,494,725
General Merchandise Stores	15.6%	\$1,298,468,028
Food Services and Drinking Places	18.5%	\$1,544,541,077
Other Retail	8.6%	\$719,782,480
Total	100.0%	\$8,336,006,712

Source: EPS.

[1] Total expenditures are consumer units multiplied by average annual expenditures in Table B-10.



APPENDIX C: Geographic Boundaries in the Study Area

Table C-1	Study Area Census Tract Codes by Subarea	C-1
Table C-2	Study Area TAZ Estimates and Projections	C-2

**Table C-1
 Stockton Boulevard Specific Plan
 Social and Economic Context
 Study Area Census Tract Codes by Subarea**

Subarea	Census Tract Number
Elmhurst	6067001700
Oak Park	6067001800 6067002700 6067002800 6067003700
Fruitridge Pocket	6067004401 6067004402
Tahoe Park	6067002900 6067003000 6067003101 6067003102
Lemon Hill	6067004601 6067004602 6067004702
South of Fruitridge	6067003202 6067003203 6067003204 6067004801

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Table C-2
Stockton Boulevard Specific Plan
Social and Economic Context
Study Area TAZ Estimates and Projections (2012-2036)

Item	Study Subarea	Average Annual Growth									
		2012		2020		2036		2012-2020		2020-2036	
		Population	Dwelling Units	Population	Dwelling Units	Population	Dwelling Units	Population	Dwelling Units	Population	Dwelling Units
Study Area TAZ											
475	Elmhurst	997	479	1,049	487	1,130	493	0.6%	0.2%	0.5%	0.1%
476	Elmhurst	470	260	806	434	1,749	991	7.0%	6.6%	5.0%	5.3%
477	Elmhurst	1,212	620	1,345	626	1,438	638	1.3%	0.1%	0.4%	0.1%
478	Elmhurst	83	44	115	44	97	44	4.2%	0.0%	(1.1%)	0.1%
479	Oak Park	2,017	1,004	2,197	1,014	2,444	1,073	1.1%	0.1%	0.7%	0.4%
480	Oak Park	2,776	1,361	2,928	1,370	3,526	1,452	0.7%	0.1%	1.2%	0.4%
481	Oak Park	3,293	1,441	3,351	1,458	3,557	1,536	0.2%	0.1%	0.4%	0.3%
482	Oak Park	2,655	1,177	2,816	1,190	3,102	1,325	0.7%	0.1%	0.6%	0.7%
483	Tahoe & Colonial	1,745	764	1,818	766	1,775	777	0.5%	0.0%	(0.1%)	0.1%
484	Tahoe & Colonial	581	263	605	264	609	271	0.5%	0.0%	0.0%	0.2%
485	Tahoe & Colonial	2,790	1,293	3,034	1,295	3,247	1,314	1.1%	0.0%	0.4%	0.1%
486	Tahoe & Colonial	3,521	1,784	3,798	1,787	3,953	1,851	1.0%	0.0%	0.3%	0.2%
487	Tahoe & Colonial	1,971	999	2,099	1,026	2,231	1,058	0.8%	0.3%	0.4%	0.2%
488	Tahoe & Colonial	2,927	1,241	3,068	1,242	3,058	1,248	0.6%	0.0%	(0.0%)	0.0%
489	Tahoe & Colonial	3,063	1,052	3,295	1,170	4,402	1,693	0.9%	1.3%	1.8%	2.3%
490	South of Fruitridge	8,380	2,443	8,014	2,448	8,337	2,653	(0.6%)	0.0%	0.2%	0.5%
491	South of Fruitridge	4,856	1,837	5,224	1,840	5,923	2,219	0.9%	0.0%	0.8%	1.2%
492	Oak Park	3,823	1,366	4,034	1,419	4,402	1,537	0.7%	0.5%	0.5%	0.5%
493	Fruitridge Pocket	3,341	1,474	3,553	1,490	3,774	1,573	0.8%	0.1%	0.4%	0.3%
494	Fruitridge Pocket	4,274	1,339	4,429	1,359	4,646	1,436	0.4%	0.2%	0.3%	0.3%
495	Lemon Hill	4,969	1,614	5,002	1,642	5,935	1,961	0.1%	0.2%	1.1%	1.1%
496	Lemon Hill	3,053	1,050	3,134	1,063	3,043	1,103	0.3%	0.1%	(0.2%)	0.2%
497	Lemon Hill	5,211	1,697	5,309	1,787	6,447	2,073	0.2%	0.6%	1.2%	0.9%
500	South of Fruitridge	1,733	613	1,596	613	2,154	735	(1.0%)	0.0%	1.9%	1.1%
895	Lemon Hill	2,775	941	2,710	942	3,052	983	(0.3%)	0.0%	0.7%	0.3%
896	South of Fruitridge	3,978	1,287	4,140	1,290	4,247	1,324	0.5%	0.0%	0.2%	0.2%
1042	Elmhurst	0	0	0	0	0	0	0.0%	0.0%	0.0%	0.0%
1163	Lemon Hill	1,664	595	1,695	596	1,826	674	0.2%	0.0%	0.5%	0.8%
1174	Elmhurst	0	0	0	0	0	0	0.0%	0.0%	0.0%	0.0%
1175	Elmhurst	982	605	1,068	605	1,143	625	1.1%	0.0%	0.4%	0.2%
1176	Elmhurst	1,271	618	1,380	619	1,342	633	1.0%	0.0%	(0.2%)	0.1%
Total		80,411	31,260	83,612	31,883	92,589	35,295	0.5%	0.2%	0.6%	0.6%
City of Sacramento		456,367	191,749	488,639	201,810	630,597	263,609	1.4%	1.3%	1.6%	1.7%
<i>Study Area as % of City</i>		17.6%	16.3%	17.1%	15.8%	14.7%	13.4%				

sa taz

Source: Sacramento Area Council of Governments (SACOG) 2016 MTP/SCS Modeling Projections by Traffic Analysis Zones (TAZ) for 2012, 2020 and 2036; EPS.