

# Appendix

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- *Economic Existing Conditions (Report from MR+E)*
- *Community Visioning Session Presentation 9-22-2012*
- *Study Session Presentation 1-23-2013*

**Old Town Wildomar Vision —  
Existing Conditions**

Prepared for  
RBF  
The City of Wildomar

Prepared by  
MR+E

9/21/12

**Introduction**

This report provides an analysis of the existing economic conditions in the City of Wildomar and has been prepared in support of the SCAG Compass Blueprint project –*Old Town Wildomar Visioning*. The project has been undertaken in order to support the City of Wildomar’s process of identifying a town center that will act as a focus for the community. The goal is to produce a vision for future land use that focuses the City’s future development into a compact walkable core with a goal of increasing connectivity and non-motorized transportation throughout the community.

This existing conditions report provides information on the economic conditions in terms of community demographics and key economic factors such as housing and employment. Information in this report is designed to provide a common set of background information for community stakeholders as part of the visioning process that is at the core of the project.

The data included in this report generally focuses on three levels of geography including:

- **City of Wildomar**-- this data corresponds to municipal boundaries of Wildomar
- **Market Area**—A local market area that corresponds to the Temecula Valley as illustrated in Figure 1
- **Riverside County**-- this data corresponds to Riverside County as a whole

Where ever possible data is presented for the both the City and the Market Area are compared as an index. This index shows the proportional representation of a variable within the City or Market Area compared to the County as a whole. Indices above 100% indicate an overrepresentation, compared to an average distribution, of the variable being displayed. Indices under 100% indicate an underrepresentation.

**Population**

Table 1 provides an overview of population characteristics for Wildomar and the surrounding market area. In 2010 Wildomar the population of just over 32,000 people living in 9992 households, the majority of which were family households which account for just over 7800 of the total. The community’s median age was reported at 34.6 years of age in the average household size was 3.22 persons. These are rates that were experienced at approximately the same level as the entire Temecula Valley market area and Riverside County as a whole.

Table 2 provides information on race and ethnicity in the community. The pattern in Wildomar’s population very closely mirrors the distribution of Riverside County and most classifications however the community is home to

appreciably fewer African-American residents and has a smaller proportion of a Hispanic population than the County total.

Information on incomes is provided on table 3. Median household income in Wildomar is just over \$61,000 per year this is lower than the median household income of the market area which was recorded at just over \$69,000 but is greater than the County average of \$54,430 per year. In terms of income distribution there are relatively few very-low and low income households in Wildomar or in the total market area when compared to their representation in Riverside County. The same is true for very high income households (those with incomes greater than \$150,000 per year) which are underrepresented on a proportional basis in Wildomar but are overrepresented in the Market Area as a whole when compared to Riverside County.

## Housing

Figure 2 shows the median sales price for single-family homes in Wildomar, Riverside County and California as a whole from April 2002 to April 2012. In the most current data available Wildomar reported a median sales price for single-family homes of \$216,876. This was greater than the County's reported average of \$202,692 but lower than the statewide median sales price of \$267,365. Sales prices are down appreciably in Wildomar from a peak that was achieved in mid-2006 in which prices were recorded over \$484,000. This is in line with decreasing sales values that have been experienced both nationally and acutely in the Inland Empire communities of California. Housing values experienced a steep decline from the peak but have stabilized in a narrow band beginning in mid-2009.

Table 4 provides detailed information on the housing stock in Wildomar. There are approximately 9800 housing units in the city of which two thirds of which are single-family detached homes. Of the total, 7,200 are owner occupied which account for 74% of the total. Interestingly Wildomar is also the site of 2,538 mobile homes which accounts for a quarter of the community's housing stock. This is distinctive feature when compared to the Temecula Valley market which has 6% of its housing stock comprised of mobile homes and the County which is recorded a rate of 9.6%. Wildomar records a higher rate of over occupancy than either the County average or the Temecula Valley market area.

Information on the age of the housing stock is provided on table 5. The median year of construction for housing in Wildomar was 1989 which is more recent than either the Temecula Valley or Riverside County as a whole. More recent housing was constructed in two distinct periods first between 1980 and 1989 in which over a third of the community's housing was built and a second. Of growth between 2000 and 2004 in which approximately 1/5 of Wildomar's dwelling units were constructed.

## Commercial Real Estate

Trends in the commercial real estate market closely tied to demand generated by employment. This is directly true for industrial and office space and indirectly for retail space which depends on strong employment to support household income and expenditures. Figure 3 shows the aggregate unemployment rate for Riverside County comparison to California from 2002 to 2012. Both California and Riverside County have been severely affected by the national economic downturn that began in 2007. At present Riverside County is experiencing unemployment rates just under 12% or about 2% higher than the statewide total. Unemployment peaked in both Riverside County and the state in the first quarter of 2010 at has been in an uneven decline over the last two years.

Table 6 shows the existing demand for industrial space in the inland Empire with a particular focus on the South County market that includes Wildomar in the I-15 corridor. At present the area has one of the lowest vacancy rates for industrial space at approximately 4.7%. Inventories are relatively tight with just over 740,000 square feet of available vacant space in the South County market area. Asking rents for warehouse distribution space is recorded at \$.30 per month triple net, which makes it one of the more affordable submarkets of the Inland Empire. As of the first quarter of 2012 S. County market area was experiencing positive sorption of industrial space. Table 7 provides data on the trend for industrial real estate asking rents. Consistent with the decline in the State and national economy that began in 2007 rental rates have been in decline since a peak was achieved that year. The South County market area has seen significant declines in average annual rent asking rates but has begun to recover more rapidly than Riverside County as a whole.

Similar data on the office market is provided on table 8. At present the South County market area reports a vacancy rate of 22.8% on a total inventory of just over 2.5 million square feet. Asking rents for class A office space are reported at \$1.68 per square foot, which is below replacement cost. In these conditions it is unlikely that there would be market acceptance of any speculative office development in the area. Build to suit development opportunities are possible if an end user can be identified and recruited to locate in the area.

## Retail market

Table 9 shows the absolute and relative change in retail sales tax collection and taxable retail sales in California Riverside and communities in the Temecula Valley. Because Wildomar incorporated in 2008 only two full years of data are available for the city. The general trend that can be observed from the State is that retail sales grew rapidly the first half of the 2000s in the market area in achieved much higher rates of growth that were experienced in the State as a whole. As with other segments of the economy a rapid contraction was experienced beginning 2007 this was felt across the board however the market show signs of stabilizing with moderate expansion occurring after

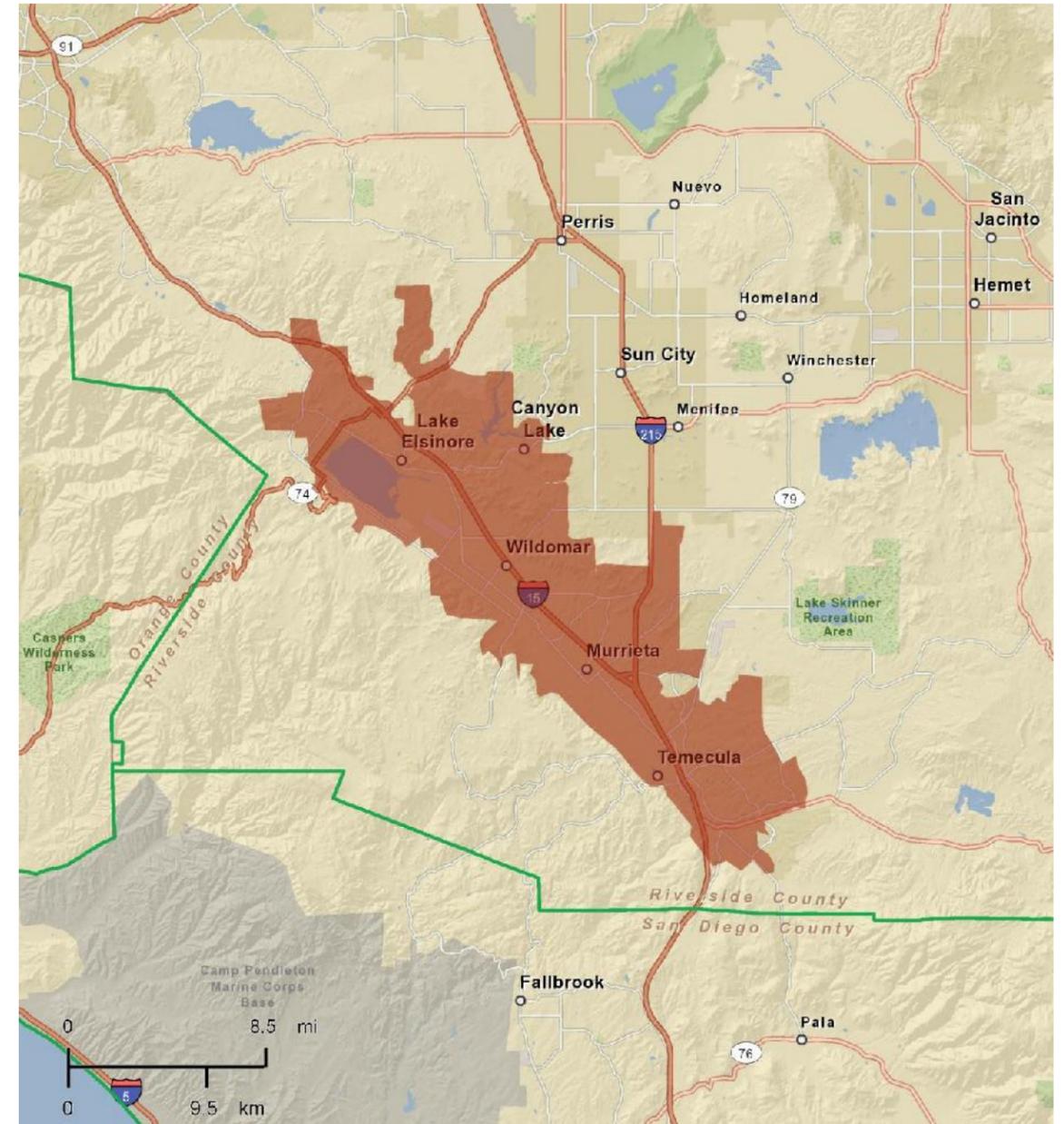
2010. This trend is confirmed by review of the average annual asking rents for retail space in California Riverside County and the South County market area. Table 10 provides data on this and shows that retail rents in 2007 average just over \$29 per square foot per year in the South County market area and the client to \$18.15 through 2012. These cheap rates are higher than the County total to remain below the statewide average.

Table 12 analyzes retail sales by category outlet for the City and the Market Area respectively. These tables show where there are sales exceeding the locally generated demand, which are shown in red and can be seen to be in surplus or sectors where the community is importing expenditures from neighboring communities. Figures in green show where deficit in supply exists and to the extent that it is leaking or being spent outside of the community. The state indicates that Wildomar may have opportunity to expand in selected retail categories including food and beverage and specialty groceries as well as some limited specialized general retail categories.

**Summary and conclusions**

A review of the existing conditions shows that Wildomar is in many respects aligned with the median of the demographic and economic conditions in Riverside County as a whole. It has somewhat underperformed the Temecula Valley market area in terms of incomes and housing costs however for most indicators the community is squarely in the median of its competitive market. Wildomar, along with the state and the County continue to deal with the aftereffects of the global economic crisis that began in 2007. As macro economic conditions began to stabilize Wildomar should be in a position to exploit growth opportunities in the middle of its regional market.

Figure I  
Wildomar Market Area



Source: ESRI and MR+E

Table 1  
Population and Households 2010  
Old Town Widlomar

	Wildomar	Market Area	Riverside County	Index	
				Wildomar Compared to County	Market Area Compared To County
<b>Summary</b>					
Total Population	32,176	273,127	2,189,641	1.5%	12.5%
Total Households	9,992	86,338	686,260	1.5%	12.6%
Average Household Size	3.22	3.15	3.14	102.5%	100.3%
Family Households	7,805	68,302	510,241	1.5%	13.4%
<b>Population by Age</b>					
0 - 4	2,281	19,780	162,438	1.4%	12.2%
5 - 9	2,400	21,763	167,065	1.4%	13.0%
10 - 14	2,573	24,180	177,644	1.4%	13.6%
15 - 19	2,763	24,054	187,125	1.5%	12.9%
20 - 24	2,205	18,022	154,572	1.4%	11.7%
25 - 34	4,036	33,810	282,429	1.4%	12.0%
35 - 44	4,310	40,205	293,305	1.5%	13.7%
45 - 54	4,967	41,269	292,738	1.7%	14.1%
55 - 64	3,227	24,658	213,739	1.5%	11.5%
65 - 74	1,815	13,856	140,598	1.3%	9.9%
75 - 84	1,137	8,643	85,796	1.3%	10.1%
85+	462	2,887	32,192	1.4%	9.0%
Median Age	34.6	33.5	33.7	102.7%	99.4%
<b>Percentage</b>					
0 - 4	7.1%	7.2%	7.4%	95.6%	97.6%
5 - 9	7.5%	8.0%	7.6%	97.8%	104.4%
10 - 14	8.0%	8.9%	8.1%	98.6%	109.1%
15 - 19	8.6%	8.8%	8.5%	100.5%	103.1%
20 - 24	6.9%	6.6%	7.1%	97.1%	93.5%
25 - 34	12.5%	12.4%	12.9%	97.2%	96.0%
35 - 44	13.4%	14.7%	13.4%	100.0%	109.9%
45 - 54	15.4%	15.1%	13.4%	115.5%	113.0%
55 - 64	10.0%	9.0%	9.8%	102.7%	92.5%
65 - 74	5.6%	5.1%	6.4%	87.8%	79.0%
75 - 84	3.5%	3.2%	3.9%	90.2%	80.8%
85+	1.4%	1.1%	1.5%	97.7%	71.9%

Source: ESRI, US Census and MR+E

Table 2  
Race and Ethnicity 2010  
Old Town Widlomar

	Wildomar	Market Area	Riverside County	Index	
				Wildomar Compared to County	Market Area Compared To County
<b>Summary</b>					
Total Population	32,176	273,127	2,189,641	1.5%	12.5%
Total Households	9,992	86,338	686,260	1.5%	12.6%
Average Household Size	3.22	3.15	3.14	102.5%	100.3%
Family Households	7,805	68,302	510,241	1.5%	13.4%
<b>Race and Ethnicity</b>					
White	22,372	191,328	1,335,147	1.7%	14.3%
African American	1,065	11,592	140,543	0.8%	8.2%
American Indian	376	2,456	23,710	1.6%	10.4%
Asian	1,454	19,221	130,468	1.1%	14.7%
Pacific Islander	69	918	6,874	1.0%	13.4%
Other Race	5,124	32,149	448,235	1.1%	7.2%
Two or More Races	1,716	15,463	104,664	1.6%	14.8%
Total Hispanic Population	11,363	84,221	995,257	1.1%	8.5%
<b>Percentage</b>					
White	69.5%	70.1%	61.0%	114.0%	114.9%
African American	3.3%	4.2%	6.4%	51.6%	66.1%
American Indian	1.2%	0.9%	1.1%	107.9%	83.0%
Asian	4.5%	7.0%	6.0%	75.8%	118.1%
Pacific Islander	0.2%	0.3%	0.3%	68.3%	107.1%
Other Race	15.9%	11.8%	20.5%	77.8%	57.5%
Two or More Races	5.3%	5.7%	4.8%	111.6%	118.4%
Total Hispanic Population	35.3%	30.8%	45.5%	77.7%	67.8%

Source: ESRI, US Census and MR+E

Table 3  
Income 2010  
Old Town Wildomar

	Wildomar	Market Area	Riverside County	Index	
				Wildomar Compared to County	Market Area Compared To County
<b>Summary</b>					
Total Population	32,176	273,127	2,189,641	1.5%	12.5%
Total Households	9,992	86,338	686,260	1.5%	12.6%
Average Household Size	3.22	3.15	3.14	102.5%	100.3%
Family Households	7,805	68,302	510,241	1.5%	13.4%
<b>Household Income</b>					
<\$15,000	741	6,506	75,682	1.0%	8.6%
\$15,000 - \$24,999	940	6,063	72,703	1.3%	8.3%
\$25,000 - \$34,999	885	6,260	68,762	1.3%	9.1%
\$35,000 - \$49,999	1,136	9,738	94,453	1.2%	10.3%
\$50,000 - \$74,999	2,333	17,637	128,470	1.8%	13.7%
\$75,000 - \$99,999	1,692	14,423	91,615	1.8%	15.7%
\$100,000 - \$149,999	1,501	16,406	97,297	1.5%	16.9%
\$150,000 - \$199,999	427	5,683	33,342	1.3%	17.0%
\$200,000+	337	3,622	23,936	1.4%	15.1%
Median Household Income	\$61,168	\$69,181	\$54,438	112.4%	127.1%
Average Household Income	\$75,515	\$83,963	\$71,680	105.4%	117.1%
Per Capita Income	\$23,286	\$26,725	\$23,011	101.2%	116.1%
<b>Percentage</b>					
<\$15,000	7.4%	7.5%	11.0%	67.2%	68.3%
\$15,000 - \$24,999	9.4%	7.0%	10.6%	88.8%	66.3%
\$25,000 - \$34,999	8.9%	7.3%	10.0%	88.4%	72.4%
\$35,000 - \$49,999	11.4%	11.3%	13.8%	82.6%	81.9%
\$50,000 - \$74,999	23.3%	20.4%	18.7%	124.7%	109.1%
\$75,000 - \$99,999	16.9%	16.7%	13.3%	126.9%	125.1%
\$100,000 - \$149,999	15.0%	19.0%	14.2%	105.9%	134.0%
\$150,000 - \$199,999	4.3%	6.6%	4.9%	87.9%	135.5%
\$200,000+	3.4%	4.2%	3.5%	96.7%	120.3%

Source: ESRI, US Census and MR+E

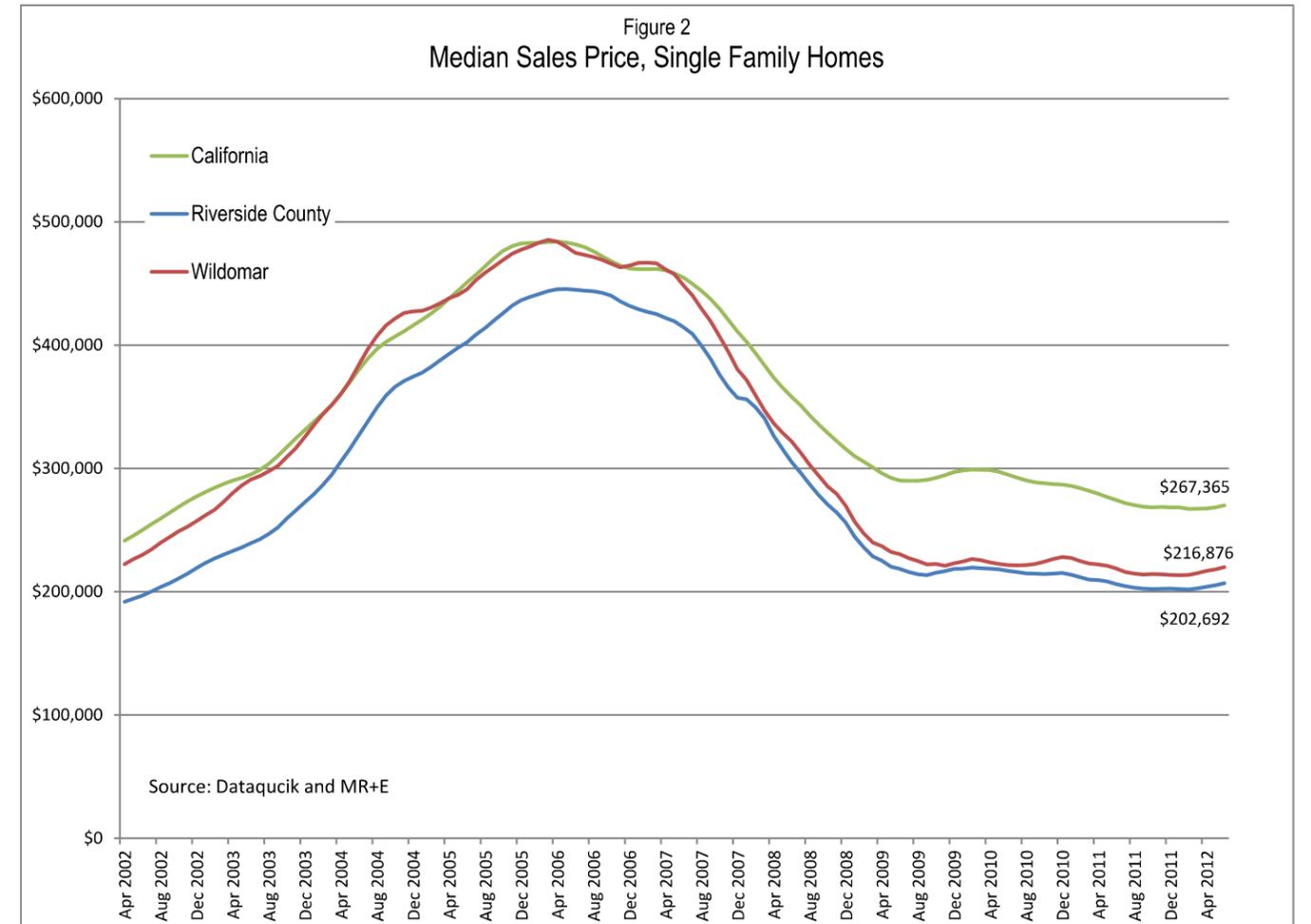


Table 4  
Housing Stock  
Old Town Wildomar

	Wildomar	Market Area	Riverside County	Index	
				Wildomar Compared to County	Market Area Compared To County
<b>Summary</b>					
Total Population	32,176	273,127	2,189,641	1.5%	12.5%
Total Households	9,992	86,338	686,260	1.5%	12.6%
Average Household Size	3.22	3.15	3.14	102.5%	100.3%
Family Households	7,805	68,302	510,241	1.5%	13.4%
<b>Tenure</b>					
Owner Occupied	7,279	58,694	453,241	1.6%	12.9%
Non-owner Occupied	2,603	27,008	296,014	0.9%	9.1%
<b>Housing units by units in structure</b>					
1--detached	6,840	65,705	504,819	1.4%	13.0%
1--attached	29	2,332	47,469	0.1%	4.9%
2	-	557	10,335	0.0%	5.4%
3 or 4	41	1,728	26,963	0.2%	6.4%
5 to 9	140	3,935	30,551	0.5%	12.9%
10 to 19	123	2,531	23,249	0.5%	10.9%
20 to 49	60	1,542	12,906	0.5%	11.9%
50 or more	111	1,748	18,397	0.6%	9.5%
Mobile home	2,538	5,482	72,224	3.5%	7.6%
Boat, RV, van, etc.	-	141	2,342	0.0%	6.0%
<b>Total</b>	<b>9,882</b>	<b>85,702</b>	<b>749,255</b>	<b>1.3%</b>	<b>11.4%</b>
<b>Tenure</b>					
Owner Occupied	74%	68%	60%	121.8%	113.2%
Non-owner Occupied	26%	32%	40%	66.7%	79.8%
<b>Housing units by units in structure</b>					
1--detached	69.2%	76.7%	67.4%	102.7%	113.8%
1--attached	0.3%	2.7%	6.3%	4.6%	42.9%
2	0.0%	0.6%	1.4%	0.0%	47.1%
3 or 4	0.4%	2.0%	3.6%	11.5%	56.0%
5 to 9	1.4%	4.6%	4.1%	34.7%	112.6%
10 to 19	1.2%	3.0%	3.1%	40.1%	95.2%
20 to 49	0.6%	1.8%	1.7%	35.2%	104.5%
50 or more	1.1%	2.0%	2.5%	45.7%	83.1%
Mobile home	25.7%	6.4%	9.6%	266.4%	66.4%
Boat, RV, van, etc.	0.0%	0.2%	0.3%	0.0%	52.6%

Source: ESRI, US Census and MR+E

Table 5  
Housing Age  
Old Town Wildomar

	Wildomar	Market Area	Riverside County	Index	
				Wildomar Compared to County	Market Area Compared To County
<b>Summary</b>					
Total Population	32,176	273,127	2,189,641	1.5%	12.5%
Total Households	9,992	86,338	686,260	1.5%	12.6%
Average Household Size	3.22	3.15	3.14	102.5%	100.3%
Family Households	7,805	68,302	510,241	1.5%	13.4%
<b>Housing units by Age</b>					
Built 2005 or later	828	7,702	50,704	1.6%	15.2%
Built 2000 to 2004	2,037	20,356	125,063	1.6%	16.3%
Built 1990 to 1999	1,875	22,677	129,361	1.4%	17.5%
Built 1980 to 1989	3,318	22,778	174,821	1.9%	13.0%
Built 1970 to 1979	1,199	7,695	121,220	1.0%	6.3%
Built 1960 to 1969	198	1,780	65,722	0.3%	2.7%
Built 1950 to 1959	257	1,194	50,817	0.5%	2.3%
Built 1940 to 1949	90	562	15,136	0.6%	3.7%
Built 1939 or earlier	80	957	16,411	0.5%	5.8%
<b>Median Year Structure Built</b>	<b>1989</b>	<b>1985</b>	<b>1986</b>	<b>100.2%</b>	<b>99.9%</b>
<b>Total</b>	<b>9,882</b>	<b>85,702</b>	<b>749,255</b>	<b>1.3%</b>	<b>11.4%</b>
<b>Percentage</b>					
Built 2005 or later	8.4%	9.0%	6.8%	123.8%	132.8%
Built 2000 to 2004	20.6%	23.8%	16.7%	123.5%	142.3%
Built 1990 to 1999	19.0%	26.5%	17.3%	109.9%	153.3%
Built 1980 to 1989	33.6%	26.6%	23.3%	143.9%	113.9%
Built 1970 to 1979	12.1%	9.0%	16.2%	75.0%	55.5%
Built 1960 to 1969	2.0%	2.1%	8.8%	22.8%	23.7%
Built 1950 to 1959	2.6%	1.4%	6.8%	38.3%	20.5%
Built 1940 to 1949	0.9%	0.7%	2.0%	45.1%	32.5%
Built 1939 or earlier	0.8%	1.1%	2.2%	37.0%	51.0%

Source: ESRI, US Census and MR+E

Figure 3  
Unemployment Rate

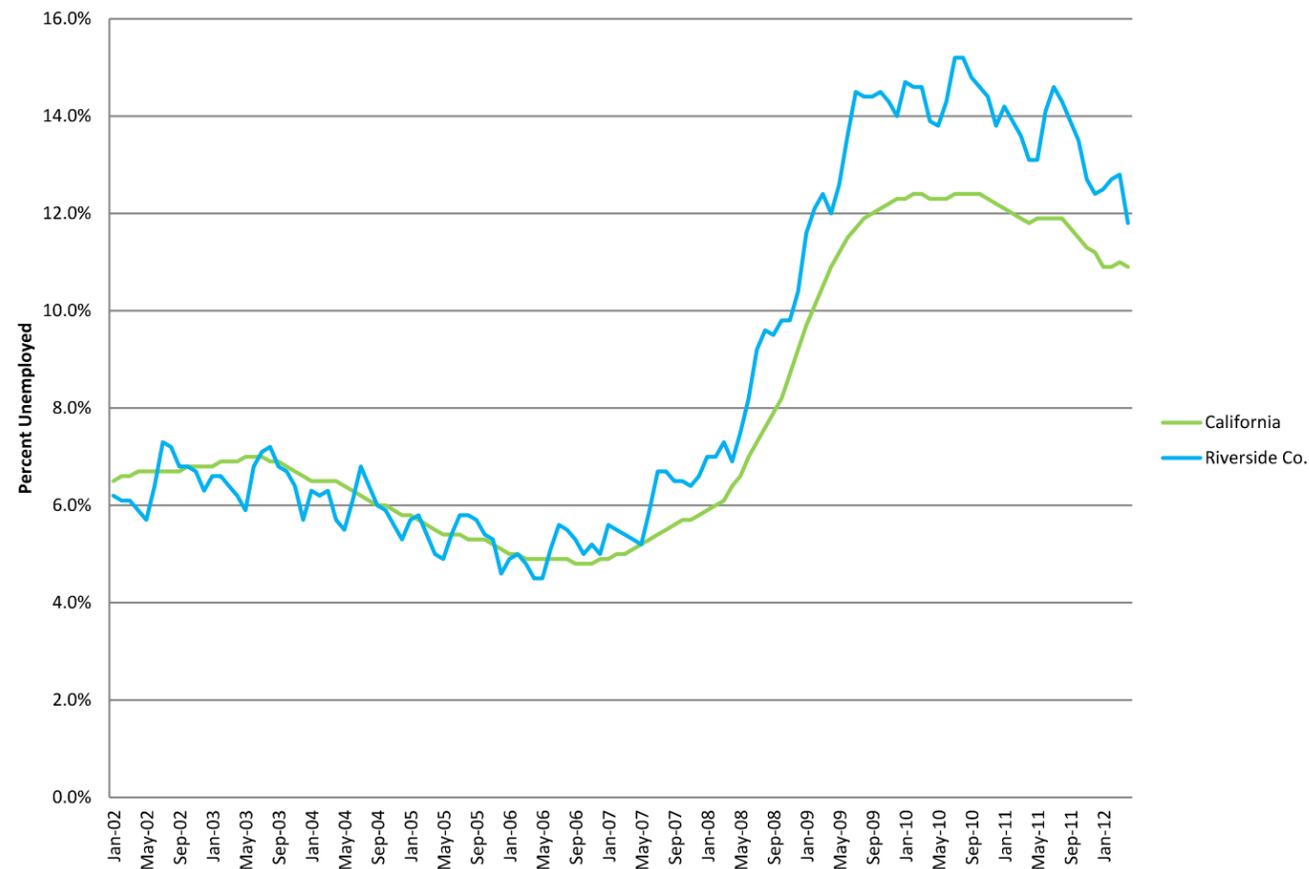


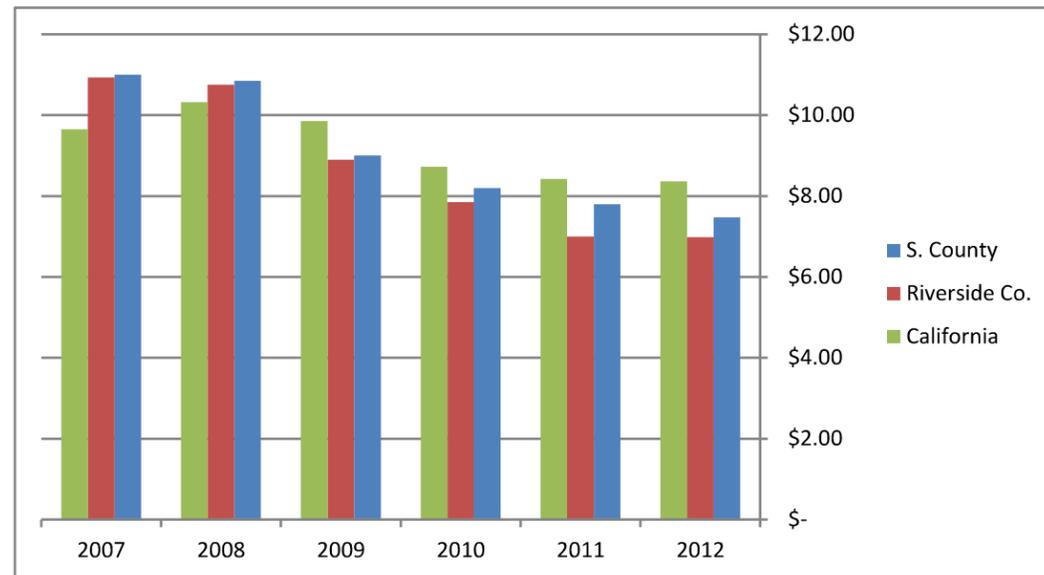
Table 6  
Industrial Market Conditions  
First Quarter 2012

By Submarket	Total SF	Vacant SF	Vacant %	Available %	Net Absorption		Construction SF	Asking Rent*	
					Current	Year To Date		WH/Dist	R&D/Flex
<b>South County</b>	<b>15,904,813</b>	<b>742,380</b>	<b>4.70%</b>	<b>7.00%</b>	<b>104,130</b>	<b>104,130 -</b>		<b>\$0.30</b>	<b>-</b>
Airport	212,090,792	11,275,192	5.30%	8.80%	778,246	778,246	776,676	\$0.34	\$0.43
East	3,800,625	731,746	19.30%	8.20%	61,675	61,675	939,504 -	-	-
High Desert	9,761,718	289,348	3.00%	3.10%	58,025	58,025 -	-	-	-
Riverside	87,798,984	7,440,602	8.50%	11.20%	424,553	424,553	1,467,594	\$0.34	\$0.49
San Bernardino	66,467,010	5,708,043	8.60%	11.40%	599,338	599,338	1,555,689	\$0.27	\$0.60
West	47,338,802	2,323,000	4.90%	10.00%	-302,433	-302,433	397,790	\$0.38	-
<b>Totals</b>	<b>443,162,744</b>	<b>28,510,311</b>	<b>6.40%</b>	<b>9.60%</b>	<b>1,723,534</b>	<b>1,723,534</b>	<b>5,137,253</b>	<b>\$0.32</b>	<b>\$0.50</b>
By Property Type	Total SF	Vacant SF	Vacant %	Available %	Current	Year To Date	Construction SF	Rent*	
General Industrial	48,102,804	5,461,794	11.40%	14.60%	447,037	447,037	35,278	\$0.35	
Incubator	17,576,484	261,100	1.50%	2.30%	24,178	24,178 -		\$0.38	
R&D/Flex	11,149,320	588,226	5.30%	8.70%	141,083	141,083 -		\$0.50	
Warehouse/Distribution	366,334,136	22,199,191	6.10%	9.30%	1,111,236	1,111,236	5,101,975	\$0.32	
<b>Totals</b>	<b>443,162,744</b>	<b>28,510,311</b>	<b>6.40%</b>	<b>9.60%</b>	<b>1,723,534</b>	<b>1,723,534</b>	<b>5,137,253</b>	<b>\$0.33</b>	

Source: Grubb and Ellis  
\* Per month NNN

Table 7  
Average Annual Asking Rent  
Industrial Space  
\$/SF/Year

Year	S. County	Riverside Co.	California
2012	\$ 7.47	\$ 6.98	\$ 8.37
2011	\$ 7.80	\$ 7.00	\$ 8.43
2010	\$ 8.20	\$ 7.85	\$ 8.72
2009	\$ 9.00	\$ 8.90	\$ 9.86
2008	\$ 10.85	\$ 10.75	\$ 10.32
2007	\$ 11.00	\$ 10.93	\$ 9.65



Source: LoopNet and MR+E

Table 8  
Office Market Conditions  
4th Quarter 2011

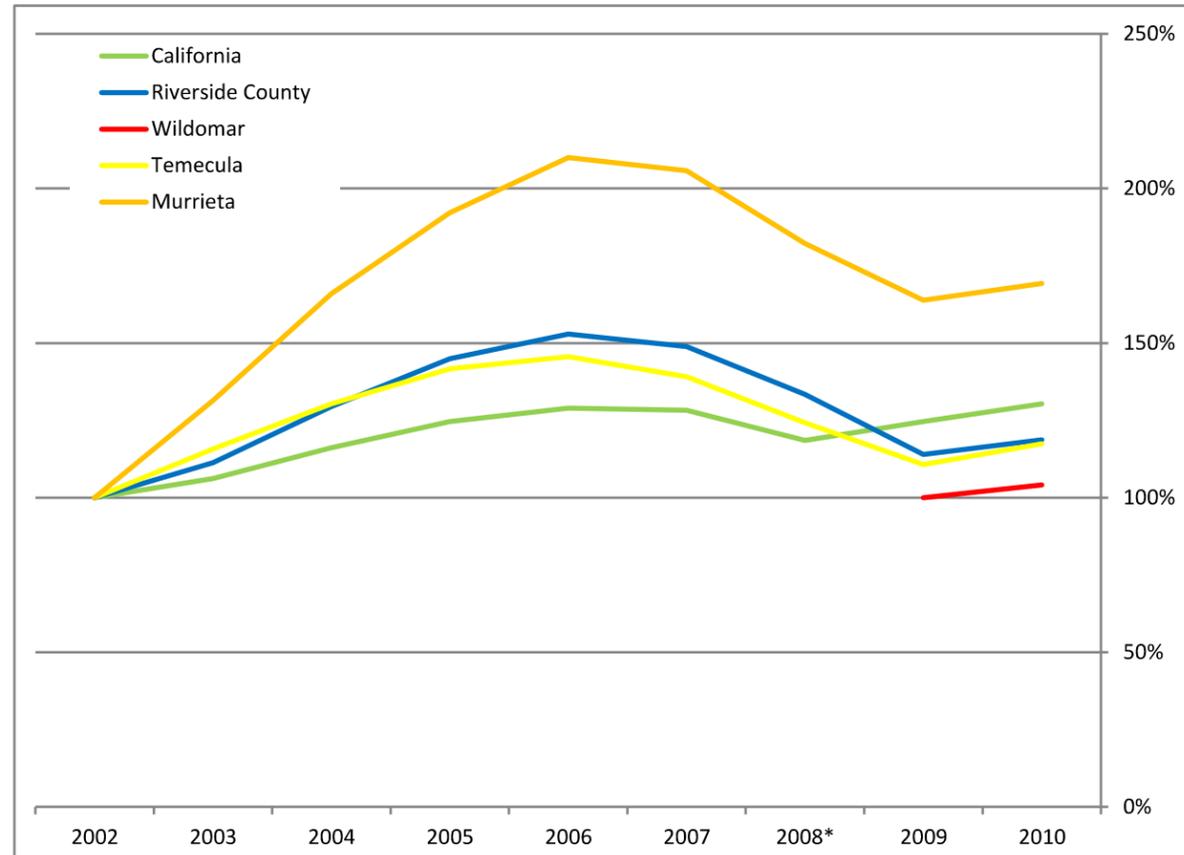
Submarket	Total SF	Vacant SF	Vacant %	Available %	Net Absorption			Asking Rent	
					Current	Year to Date	Construction	Class A	Class B
<b>South County</b>	<b>2,598,788</b>	<b>591,901</b>	<b>22.80%</b>	<b>23.40%</b>	<b>19,006</b>	<b>19,006 -</b>		<b>\$1.68</b>	<b>\$1.39</b>
Airport	8,248,447	1,897,346	23.00%	29.00%	32,896	32,896 -		\$1.95	\$1.46
High Desert	845,937	191,841	22.70%	24.00%	-9,139	-9,139 -	-		\$1.40
Riverside	8,781,570	2,146,790	24.40%	26.20%	36,318	36,318	141,133	\$2.10	\$1.52
San Bernardino	5,981,771	1,398,299	23.40%	24.90%	26,120	26,120 -		\$1.60	\$1.41
West	1,559,809	315,983	20.30%	22.40%	-1,152	-1,152 -		\$2.18	\$1.44
<b>Totals</b>	<b>28,016,322</b>	<b>6,542,160</b>	<b>23.40%</b>	<b>26.20%</b>	<b>104,049</b>	<b>104,049</b>	<b>141,133</b>	<b>\$1.93</b>	<b>\$1.46</b>

Source: Grubb and Ellis

Table 9  
Sales Tax Trend  
( in thousands )

Year	California	Riverside County	Wildomar	Temecula	Murrieta
2010	393,259,857	23,152,780	104,184	2,180,304	903,640
2009	375,965,447	22,227,877	100,049	2,055,847	874,619
2008*	357,318,427	26,003,595	23,983	2,307,072	972,575
2007	387,025,102	29,023,609		2,583,938	1,098,431
2006	389,066,572	29,816,237		2,704,675	1,120,712
2005	375,808,125	28,256,491		2,630,386	1,025,757
2004	350,172,688	25,237,148		2,421,040	885,682
2003	320,217,054	21,709,135		2,149,360	701,427
2002	301,612,306	19,498,994		1,856,973	533,755

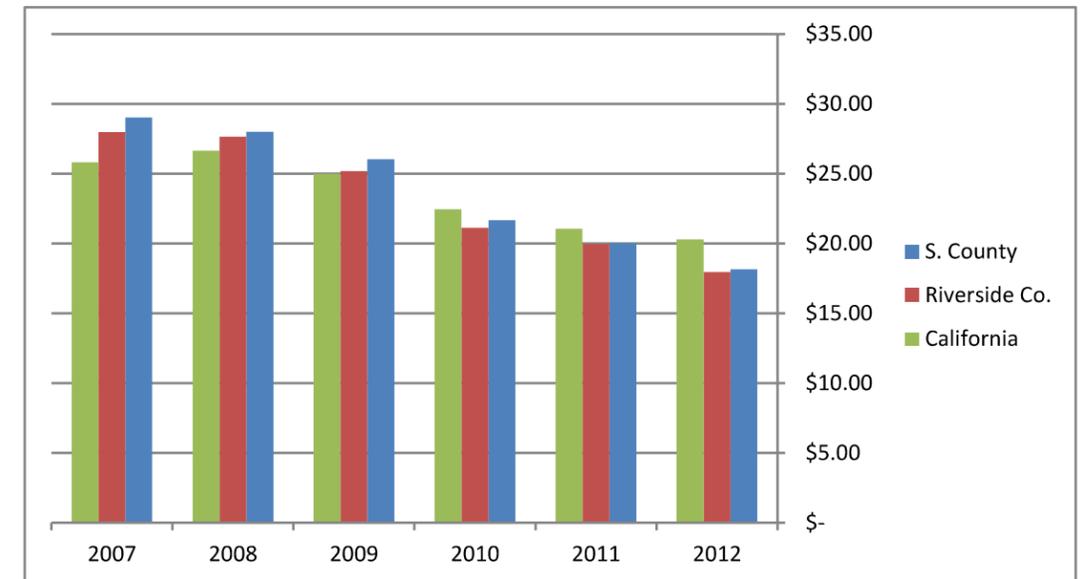
\* Partial year Wildomar incorporated 7/1/08



Source: State Board of Equalization and MR+E

Table 10  
Average Annual Asking Rent  
Retail  
\$/ SF / Year

Year	S. County	Riverside Co.	California
2012	\$ 18.15	\$ 17.96	\$ 20.29
2011	\$ 20.03	\$ 19.97	\$ 21.06
2010	\$ 21.66	\$ 21.12	\$ 22.46
2009	\$ 26.03	\$ 25.18	\$ 24.98
2008	\$ 28.00	\$ 27.65	\$ 26.64
2007	\$ 29.02	\$ 27.98	\$ 25.81



Source: LoopNet and MR+E

Table 12  
Retail Leakage Analysis  
Market Area

<i>Industry Summary</i>	NAICS	Demand (Retail Potential)	Supply (Retail Sales)	Retail Gap	Leakage/Surplus Percentage
Total Retail Trade and Food & Drink	44-45,722	\$2,429,773,942	\$2,468,176,592	-\$38,402,651	-0.8
Total Retail Trade	44-45	\$2,078,421,706	\$2,034,443,724	\$43,977,982	1.1
Total Food & Drink	722	\$351,352,236	\$433,732,868	-\$82,380,632	-10.5
<i>Industry Group</i>	NAICS	Demand (Retail Potential)	Supply (Retail Sales)	Retail Gap	Leakage/Surplus Percentage
Motor Vehicle & Parts Dealers	441	\$471,189,026	\$641,095,505	-\$169,906,479	-15.3
Automobile Dealers	4411	\$417,925,641	\$570,005,435	-\$152,079,794	-15.4
Other Motor Vehicle Dealers	4412	\$40,881,796	\$42,635,354	-\$1,753,558	-2.1
Auto Parts, Accessories & Tire Stores	4413	\$12,381,590	\$28,454,717	-\$16,073,127	-39.4
Furniture & Home Furnishings Stores	442	\$46,078,431	\$52,346,585	-\$6,268,154	-6.4
Furniture Stores	4421	\$19,612,823	\$34,947,223	-\$15,334,400	-28.1
Home Furnishings Stores	4422	\$26,465,608	\$17,399,362	\$9,066,246	20.7
Electronics & Appliance Stores	4431	\$67,051,401	\$29,376,419	\$37,674,982	39.1
Bldg Materials, Garden Equip. & Supply Stores	444	\$86,420,091	\$94,010,454	-\$7,590,363	-4.2
Bldg Material & Supplies Dealers	4441	\$82,747,055	\$91,578,114	-\$8,831,059	-5.1
Lawn & Garden Equip & Supply Stores	4442	\$3,673,036	\$2,432,340	\$1,240,696	20.3
Food & Beverage Stores	445	\$370,997,270	\$400,938,841	-\$29,941,571	-3.9
Grocery Stores	4451	\$352,512,679	\$382,970,693	-\$30,458,014	-4.1
Specialty Food Stores	4452	\$9,005,574	\$10,474,036	-\$1,468,462	-7.5
Beer, Wine & Liquor Stores	4453	\$9,479,017	\$7,494,112	\$1,984,904	11.7
Health & Personal Care Stores	446,4461	\$44,147,610	\$65,505,079	-\$21,357,469	-19.5
Gasoline Stations	447,4471	\$310,217,957	\$230,741,350	\$79,476,608	14.7
Clothing & Clothing Accessories Stores	448	\$95,322,913	\$101,787,967	-\$6,465,054	-3.3
Clothing Stores	4481	\$74,081,542	\$84,643,478	-\$10,561,936	-6.7
Shoe Stores	4482	\$11,429,264	\$11,414,538	\$14,725	0.1
Jewelry, Luggage & Leather Goods Stores	4483	\$9,812,108	\$5,729,950	\$4,082,157	26.3
Sporting Goods, Hobby, Book & Music Stores	451	\$12,640,259	\$29,157,050	-\$16,516,791	-39.5
Sporting Goods/Hobby/Musical Instr Stores	4511	\$9,599,156	\$19,821,073	-\$10,221,917	-34.7
Book, Periodical & Music Stores	4512	\$3,041,103	\$9,335,977	-\$6,294,874	-50.9
General Merchandise Stores	452	\$278,715,091	\$334,952,265	-\$56,237,174	-9.2
Department Stores Excluding Leased Depts.	4521	\$93,576,598	\$124,958,560	-\$31,381,962	-14.4
Other General Merchandise Stores	4529	\$185,138,493	\$209,993,705	-\$24,855,212	-6.3
Miscellaneous Store Retailers	453	\$32,502,739	\$38,466,391	-\$5,963,652	-8.4
Florists	4531	\$867,730	\$1,660,366	-\$792,636	-31.4
Office Supplies, Stationery & Gift Stores	4532	\$11,043,884	\$17,645,858	-\$6,601,974	-23.0
Used Merchandise Stores	4533	\$764,021	\$3,115,861	-\$2,351,841	-60.6
Other Miscellaneous Store Retailers	4539	\$19,827,105	\$16,044,306	\$3,782,799	10.5
Nonstore Retailers	454	\$263,138,916	\$16,065,819	\$247,073,098	88.5
Electronic Shopping & Mail-Order Houses	4541	\$248,303,570	\$2,127,174	\$246,176,396	98.3
Vending Machine Operators	4542	\$1,643,407	\$686,820	\$956,587	41.1
Direct Selling Establishments	4543	\$13,191,939	\$13,251,825	-\$59,886	-0.2
Food Services & Drinking Places	722	\$351,352,236	\$433,732,868	-\$82,380,632	-10.5
Full-Service Restaurants	7221	\$148,806,511	\$172,485,253	-\$23,678,743	-7.4
Limited-Service Eating Places	7222	\$181,459,619	\$247,143,857	-\$65,684,238	-15.3
Special Food Services	7223	\$18,795,577	\$12,567,757	\$6,227,820	19.9
Drinking Places - Alcoholic Beverages	7224	\$2,290,529	\$1,536,000	\$754,529	19.7

Red= Surplus in market  
Green = Deficit in market

Source: ESRI, Data US and MR+E

Building on our history to create a heart for our community



**Wildomar Old Town  
Community Visioning Session**  
Saturday, September 22, 2012  
Wildomar Elementary



### Agenda

- Presentation - *Project Introduction*
- Individual Input - *Considerations & Ideas*
- Presentation - *Opportunities & Constraints*
- Survey - *TownScan*
- Small Group Work
- Summary & Next Steps




## PROJECT INTRODUCTION



### Project Background

- Grant funding from SCAG  
Compass Blueprint program





### Creating a Center

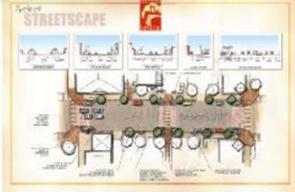
- A focal point or community core
  - "Town Center," "Old Town," "Downtown," "Civic Center"...
- Building on history
- Finding opportunities for economic development
- Promoting social / community life
- Achieving other community goals
  - Ideas from Strategic Vision Plan ("Wildomar Village" community center, performing arts, etc...)




### Communicating the Vision

- Vision Poster
- Streetscape
- "Palettes"
  - Streets
  - Buildings
  - Public space
  - Signage






### Timeline

- Summer 2012 → Studying Wildomar
- Fall-Winter 2012 → Initial Community Input & Developing Concepts
- Early 2013 → Community Feedback
- Spring-Summer 2013 → Presentation to Council

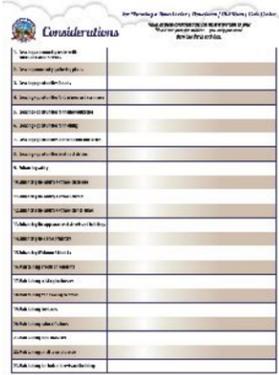


## CONSIDERATIONS & IDEAS



### Considerations Exercise

- Review handout on your table
- Place 5 dot stickers on large sheet
- OK to place more than one dot in each box




### Your Ideas!

- What specific ideas do you have for a town center / old town / downtown / civic center?
- Use up to 3 Post-It Notes
- ONE idea per note!

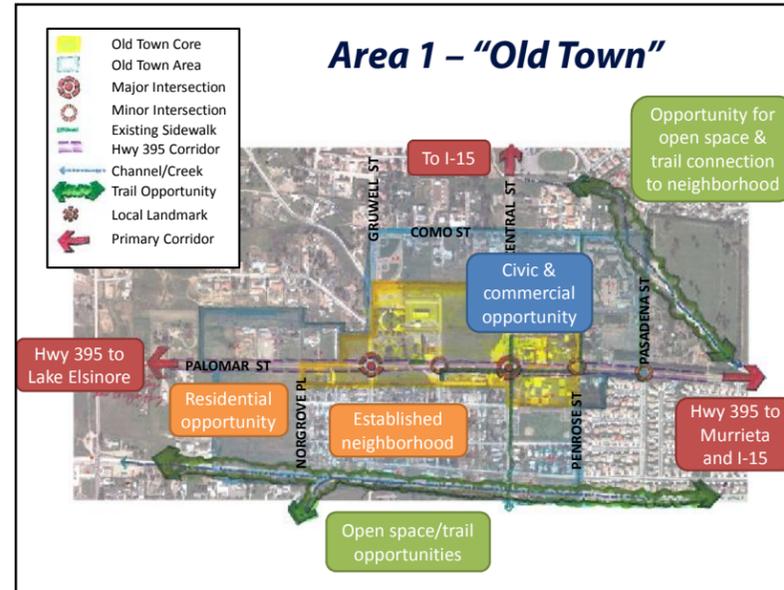
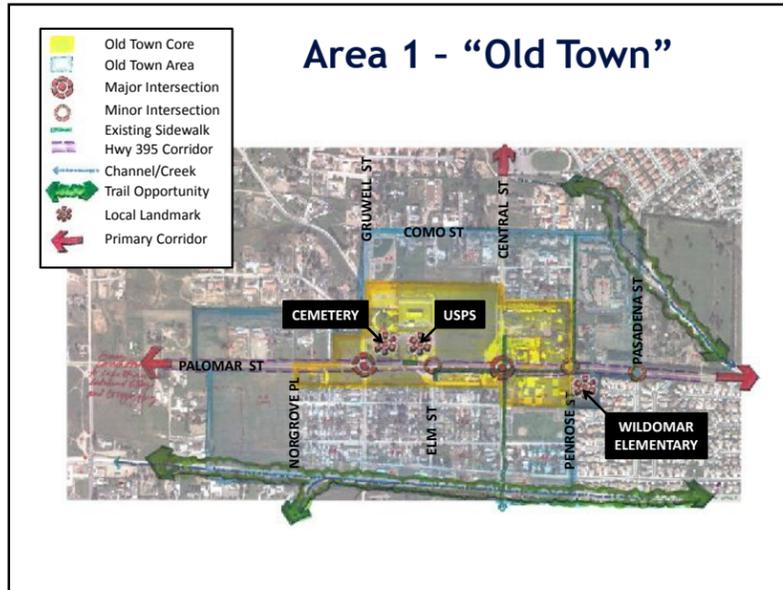



## OPPORTUNITIES & CONSTRAINTS

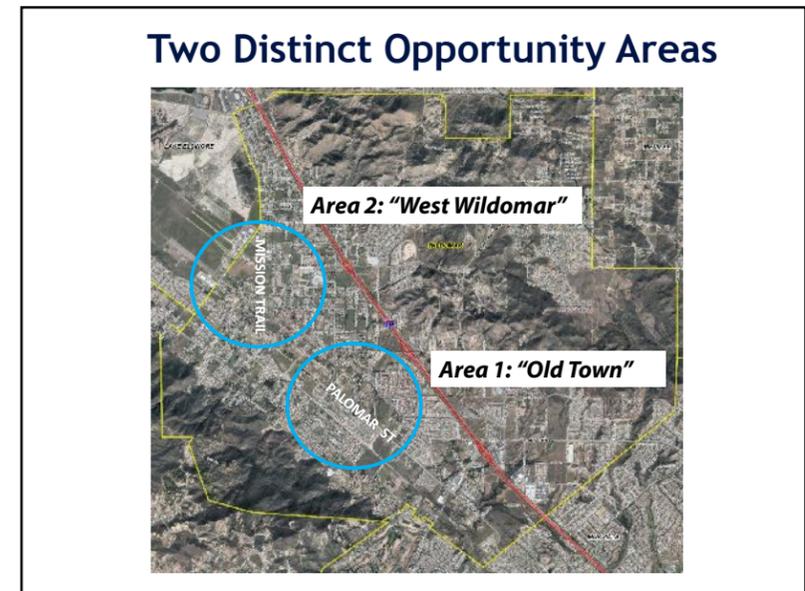


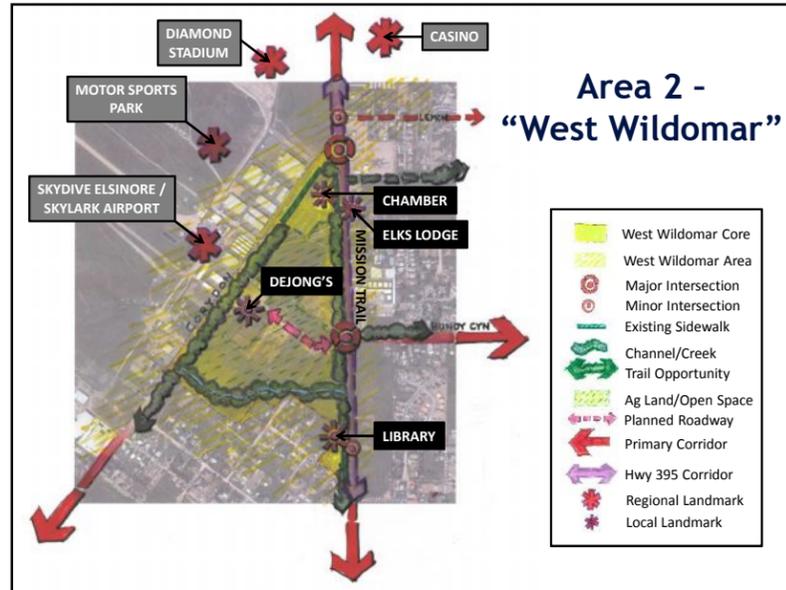
### Two Distinct Opportunity Areas





- ### Area 1 Streets & Connections
- | Opportunities   | Constraints   |
|---|---|
| <ul style="list-style-type: none"> <li>Direct freeway access on Central Avenue</li> <li>Opportunities for new entry roadways</li> <li><b>Grid streets diffuse traffic</b></li> <li>2 RTA bus routes</li> <li>Opportunities for trail along stormwater channel</li> <li>Opportunities for bike lanes and additional sidewalks</li> </ul> | <ul style="list-style-type: none"> <li>Palomar Street is regional thoroughfare and future 4-lane roadway (per General Plan)</li> <li><b>Most grid streets are residential</b></li> <li>Stormwater channel north/ south crossings are limited</li> </ul> |





**Area 2 Streets & Connections**

Opportunities	Constraints
<ul style="list-style-type: none"> <li>Direct freeway access on Bundy Canyon Road</li> <li>Opportunities for new entry roadways &amp; planned extension of Bundy Canyon</li> <li>2 RTA bus routes</li> <li>Opportunities for trail along watercourse</li> <li>Opportunities for bike lanes and additional sidewalks</li> </ul>	<ul style="list-style-type: none"> <li>Mission Trail and Corydon Streets are regional thoroughfares</li> <li>Mission Trail is future 4-lane roadway (per General Plan)</li> <li>Mission Trail is wide for pedestrian crossings</li> </ul>



**Quick Check-In**

Did we miss something important about either of these areas?

Get your polling devices ready!

## TOWNSCAN VISUAL PREFERENCE SURVEY



Roll up your sleeves!

## SMALL GROUP WORK



### Choose a Topic

Streetscape & Amenities

Branding & Theme

Land Use & Development

Connectivity & Mobility



### Choose a Topic

Streetscape & Amenities

- Build on TownScan
- “Look and feel” of streets
- Amenities for pedestrians



Products: Collages, Drawings, Notes

### Choose a Topic

- Vision statement that “paints a positive picture” of what the area should be in the future
- Ideas for a distinct identity / theme

Branding & Theme

Products: Vision Statement, Collages, Notes

### Choose a Topic



- Types of land uses
- Function / role of this place within Wildomar and within the region
- Economic & fiscal considerations

Land Use & Development

Products: Map, Notes

## Choose a Topic

- Networks and facilities for travel by bike, walking, horseback, transit, vehicle
- Trail network



Connectivity & Mobility

Products: Map, Notes

## Group Roles

- Recorder
- Presenter
- Buffalo



The roamer

Present to the larger group...

## SMALL GROUP PRESENTATIONS

## Summary & Next Steps

- Stay tuned!
- Sign up for email
- Submit comments

[wildomaroldtown.info](http://wildomaroldtown.info)

Building on our history to create a heart for our community



**City Council / Planning Commission  
Joint Study Session**

*"Downtown Concepts"*  
Wednesday, January 23, 2013



## Agenda

- Presentation
  - Project Background
  - Potential Core Areas
  - "Old Town" Concepts
  - "West Wildomar" Concepts
- Discussion



## PROJECT BACKGROUND



## Project Origins

- Grant funding from SCAG  
Compass Blueprint program





## Creating a Center

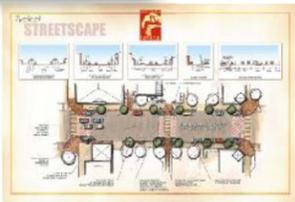
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  - Ideas from Strategic Vision Plan  
("Wildomar Village" community center, performing arts, etc...)




## Communicating the Vision

- Vision Poster
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  - Buildings
  - Public space
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### Timeline

- Summer 2012 → Studying Wildomar
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- Early 2013 → Community Feedback & Study Session
- Spring 2013 → Presentation to Council



### Public Input

Top considerations for a city core:

- Business/commerce
- Small town character
- Attracting visitors
- Community center / services
- Sense of history
- Horseback and bicycle travel
- Enhancing streets & buildings
- Maintaining low taxes



### Public Input



- Top themes in ideas from participants:
- Pedestrian-oriented design and businesses
  - Trails
  - Historic and rural features
  - Civic/community uses



### Economic Factors in Wildomar

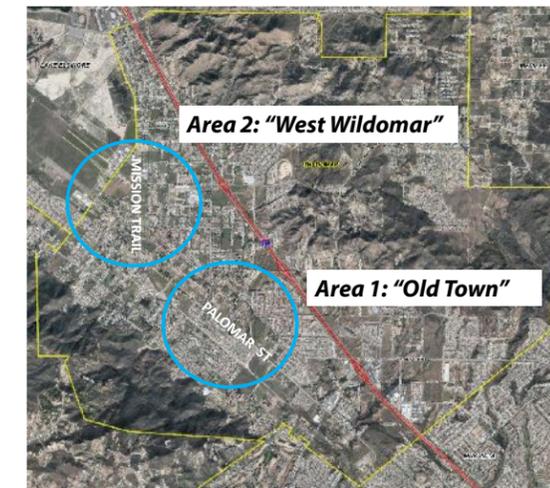
Opportunities for <b>retail</b> to meet market demand in Temecula Valley for <i>food and beverage, groceries, and other specialized retail</i>	
High rate of <b>home ownership</b> ; home prices have stabilized	
<b>Median household income</b> higher than County, but lower than Temecula Valley	
Low vacancy rates for <b>industrial</b> ; rents recovering	
High vacancy rates for <b>office</b>	

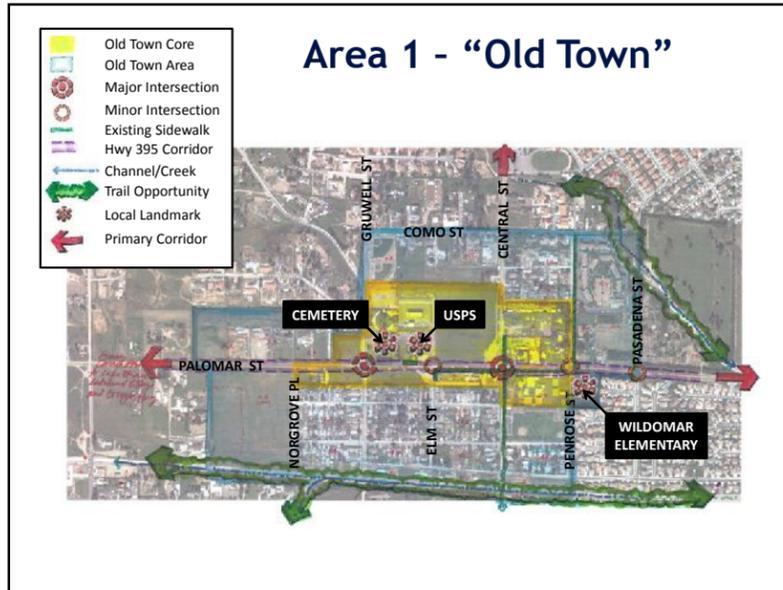


### POTENTIAL CORE AREAS

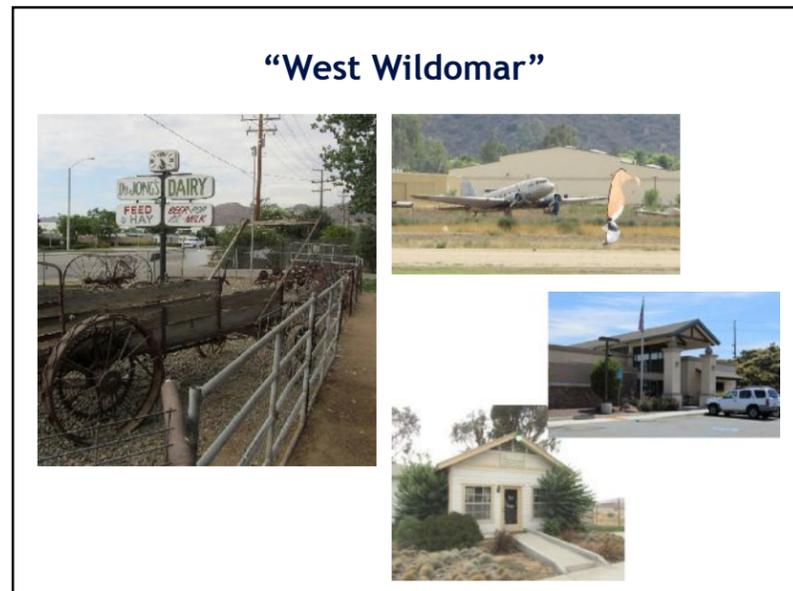
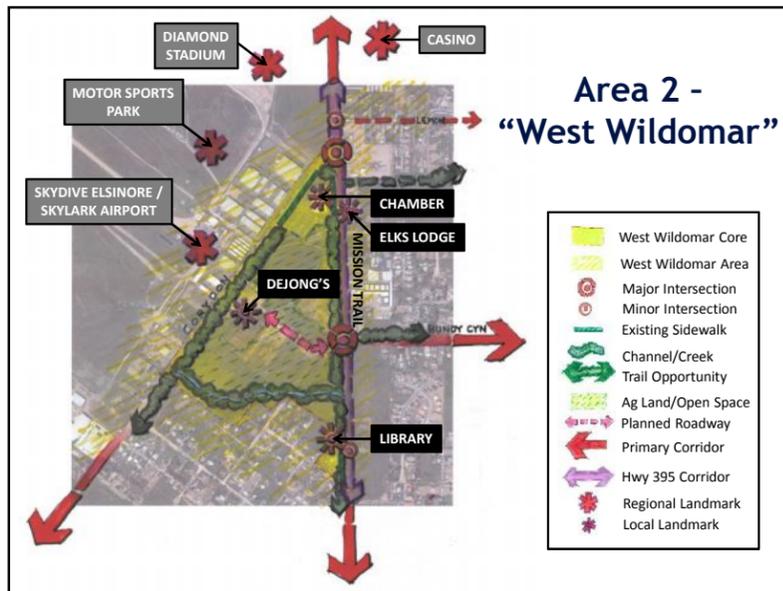


### Two Distinct Opportunity Areas





- ### “Old Town” Factors
- |   |   |
|---|---|
| <h4>Key Opportunities</h4> <ul style="list-style-type: none"> <li>▪ Historic role as center of community</li> <li>▪ Historic and cultural assets</li> <li>▪ Vacant and underutilized parcels</li> <li>▪ Potential trail connections</li> <li>▪ Availability of reclaimed water</li> </ul> | <h4>Key Constraints</h4> <ul style="list-style-type: none"> <li>▪ Palomar Street planned width not conducive to pedestrians</li> <li>▪ Earthquake faults through properties</li> <li>▪ Flood hazards along channel</li> <li>▪ Incomplete sewer infrastructure</li> <li>▪ Borders an established neighborhood</li> </ul> |
|---|---|



- ### “West Wildomar” Factors
- |   |  |
|---|--|
| <h4>Key Opportunities</h4> <ul style="list-style-type: none"> <li>▪ Historic and cultural assets</li> <li>▪ Larger vacant parcels</li> <li>▪ Nearby attractions             <ul style="list-style-type: none"> <li>• Airport, Motorsports Park, Stadium, Hotel/Casino</li> </ul> </li> <li>▪ Drainage</li> <li>▪ Nearby light industrial</li> <li>▪ Planned Bundy Canyon extension</li> </ul> | <h4>Key Constraints</h4> <ul style="list-style-type: none"> <li>▪ Corydon Street planned width not conducive to pedestrians</li> <li>▪ Potential airport hazards</li> <li>▪ Flood hazards on DeJong property south to Melinda</li> <li>▪ Incomplete sewer infrastructure</li> <li>▪ Borders an established neighborhood</li> </ul> |
|---|--|

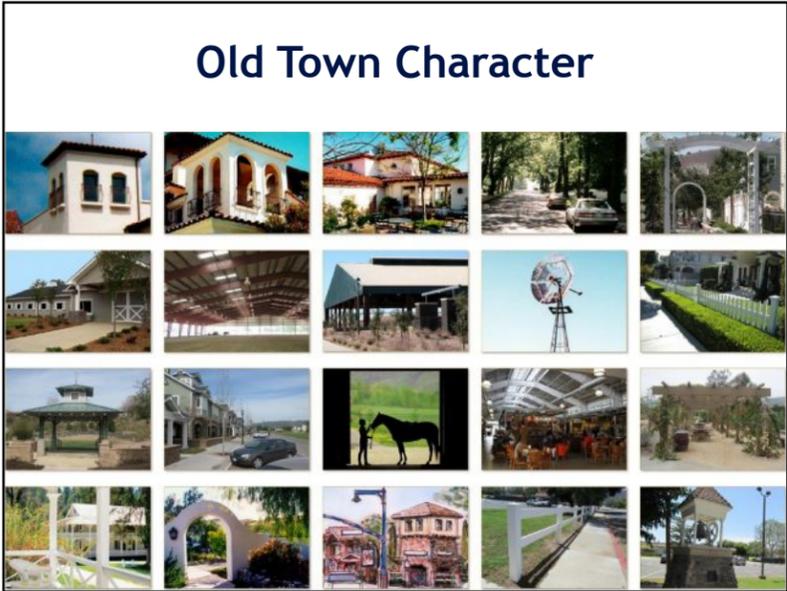


### Variation 1

- No equestrian center
- More space for community / civic uses
- More commercial

### Variation 2

- More parking for equestrian center
- Minimal civic uses
- More commercial
- Less mixed use



## WEST WILDOMAR CONCEPTS

### West Wildomar Concept Plan

### West Wildomar Concept Plan

- Bundy Canyon Extension to Cereal St.
- Roundabout
- New internal roadways
- Trail connections

**West Wildomar Concept Plan**

- Local- and visitor-serving commercial uses

The map shows a triangular development area with several key features: Moto-Sports Park at the top; SkyLark Air Port on the left; Civic Center in the middle; and various commercial zones (COMM) and residential areas. Landmarks include a Gateway Feature, Chamber of Commerce, Animal Shelter, and a Water Tower. A library and trails are also indicated.

**West Wildomar Concept Plan**

- Gateway feature

This map is identical to the first one but includes a callout box highlighting the Gateway Feature, which is a prominent structure at the top of the development.

**West Wildomar Concept Plan**

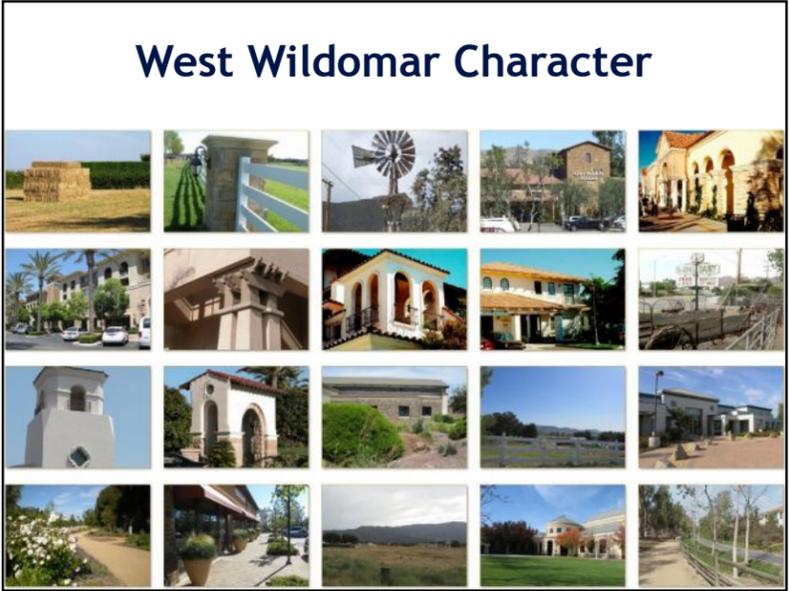
- Civic center

This map is identical to the first one but includes a callout box highlighting the Civic Center, a central hub of the development.

**West Wildomar Concept Plan**

- Light industrial uses
- Additional commercial opportunities

The map shows the same layout as the previous ones, but with additional callouts for Light Industrial (LI) and Commercial (COMM) zones, indicating areas for further development.



**Discussion**

Pros and cons?  
 Features of Old Town "variations" that should be included in Concept Plan?  
 Reactions to character/design images?

## Summary & Next Steps

- Refining a concept
- Completing additional design details
- Return to Council in March

[wildomaroldtown.info](http://wildomaroldtown.info)

