

**APPENDIX B**

**NON-RESIDENTIAL ABSORPTION ANALYSIS**

*CITY OF WOODLAND  
GENERAL PLAN UPDATE*

*NON-RESIDENTIAL ABSORPTION ANALYSIS*

*I. RETAIL ABSORPTION*

*A. Retail Sales Capture*

The first step in analyzing an area's retail market is to determine whether "leakage" or "capture" of retail sales is occurring. Leakage would occur if there is insufficient retail space to meet the shopping needs of city of Woodland residents, which would result in retail dollars "leaking" outside the city as shoppers go elsewhere to consume the goods and services they demand. Capture would occur if there is an excessive amount of retail space to meet the shopping needs of Woodland residents, combined with a lack of retail space in surrounding areas, which would result in retail dollars being "captured" from areas outside the city as shoppers from surrounding areas come to Woodland to consume the goods and services they demand.

The results of the retail sales leakage analysis for Woodland are presented in Table 1 following the text of this report. The period 1987 through 1993 was examined because the County Fair Mall opened in 1987 and retail sales data for the city was not yet available for 1994. As Table 1 shows, total purchasing power generated by Woodland households was far less than actual retail sales in the city. This indicates that Woodland has been capturing retail sales from other areas, predominantly because the regional mall is attracting shoppers from outside the city. The amount of retail sales captured by Woodland has declined steadily from 1987 to 1993, but the percentage of total retail sales attributable to captured sales was still 39% in 1993. For purposes of the retail absorption analysis discussed further below, it is assumed that 39% of future retail sales occurring in Woodland continue to represent sales captured from other areas. The premise underlying this assumption is two-fold: 1) that retail development outside the city continues to be insufficient to meet retail demands generated by new residential development outside the city; and 2) that residential growth rates in surrounding areas are comparable to the residential growth rate in Woodland.

*B. Woodland's Retail Trade Areas*

City of Woodland retail establishments operate in a unique environment that includes a vast retail marketplace. The nearest city with substantial purchasing power, the city of Davis, does not have a region-serving retail center. The closest areas to offer community/regional shopping include Yuba City and Marysville to the north, the West

Sacramento/Sacramento market to the east, and Vacaville to the south. Consequently, Woodland's retail trade areas, shown on the map after page 13, extend for miles along major north-south transportation corridors and include the following:

- The Primary Trade Area is the city of Woodland.
- The Secondary Trade Area is all of Yolo County, excluding Winters and West Sacramento (and areas of limited population south of West Sacramento such as Clarksburg). Because Winters has good access to Vacaville, it is not considered part of the secondary trade area. West Sacramento is considered part of the Sacramento retail marketplace.
- The Tertiary Trade Area includes the secondary trade area plus Winters, Dixon, and areas of South Colusa County up to Williams. Shoppers from Dixon have easy access to Woodland via Highway 113, but will spend significant portions of their regional shopping dollars in Vacaville. Woodland can be reached quickly via Interstate 5 by Williams and surrounding areas; however, shoppers in these areas may choose to travel to Yuba City and Marysville as well.

The large secondary and tertiary trade areas around Woodland explain the significant capture of retail sales that Woodland experiences. The leakage analysis also helps to identify how much each trade area contributes toward the total quantity of retail sales in the city. Along with other retail assumptions, the estimated capture rates by retail category for each of the three trade areas are provided in Table 2. The capture rates are summarized in the table below:

**TRADE AREA CAPTURE RATES BY RETAIL CATEGORY**

<i>Trade Area</i>	<i>Neighborhood Retail</i>	<i>Other Retail</i>
Primary	100%	75%
Secondary	0%	45%
Tertiary	0%	25%

The two categories of retail shopping are described below:

- **Neighborhood Retail:** Neighborhood shopping centers generally provide convenience goods and personal services. These goods and services are purchased relatively frequently and at the most convenient location without much comparison shopping. Typical items include food, medication, hardware, dry cleaning, barber and beauty services, and shoe repair services. A neighborhood

center is a small shopping center, generally ranging from 75,000 to 150,000 square feet of retail space.

- **Other Retail:** Community, regional, and other shopping centers provide goods and services that are bought after some degree of deliberation, on a less frequent basis than those provided by neighborhood centers, and that are somewhat specialized in nature. The products purchased at these other centers typically last longer than those from neighborhood centers and are differentiated by brand identification, retailer image, and shopping area ambience. Typical items include apparel, household furnishings, and specialty items like jewelry, cameras, and books. Other retail centers in smaller areas like Woodland range in size from 200,000 to 500,000 square feet of retail space. Based on historical data, it is assumed that other retail shopping is distributed among the following land use designations:

***DISTRIBUTION OF OTHER RETAIL SHOPPING BY LAND USE DESIGNATION***

<i>Land Use Designation</i>	<i>Percentage</i>
Central Commercial (CC)	10%
General Commercial (GC)	40%
Service Commercial (SC)	20%
Highway Commercial (HC)	30%
Total	100%

It is assumed that Woodland will capture 100% of neighborhood shopping demand generated by Woodland residents. Naturally, some residents who work outside the area will conduct some of their neighborhood shopping (including lunches, trips to the dry cleaners, etc.) in the area of their workplace, but workers who commute to Woodland will do the same.

In terms of other retail shopping demand, the percentages shown in the capture rate table on the previous page are typical for the size and composition of each Woodland trade area. For example, while local shoppers will take advantage of their proximity to the County Fair Mall to meet the majority of their community shopping needs, these shoppers are likely to make trips to outlet centers, power retail centers, various upscale centers, and other shopping areas as well. The farther shoppers in the secondary and tertiary trade areas are from Woodland and the closer they are to other shopping locations, the less likely they are to frequent Woodland shopping centers. This accounts for the declining capture rates from primary to tertiary trade areas.

The capture rates also reflect the estimated distribution of retail sales in Woodland by trade area. Multiplying the estimated capture rates by the purchasing power of the trade areas, and accounting for the split between neighborhood and other retail, results in the amount of retail sales occurring in Woodland.

### **C. Home Prices and Household Incomes**

The retail absorption analysis relates directly to the residential absorption estimates since purchasing power and demand for retail goods and services are primarily a function of the number of households and household income. The number of new households, multiplied by the average household income, multiplied by the percentage of income spent on retail items results in an estimate of demand for retail goods and services. Table 3 includes the average monthly rent or home price and a corresponding household income for each of the six residential categories analyzed in the residential absorption analysis. Note that housing units in the multi-family category are assumed to be 70% renter-occupied and 30% owner-occupied.

Average household incomes for each category were derived using typical income factors for rental and ownership units as follows:

- Annual rent is assumed to be 30% of household income.
- Home prices are assumed to be three times greater than household income.

### **D. Existing Supply of Retail Acres in the Woodland Area**

Table 4 outlines the potential number of retail acres that could be built in the Woodland area based on existing land use approvals and zoning. Total supply amounts to 270 acres, divided between 13 acres of neighborhood retail and 257 acres of other retail land use designations. Of the 270 acres, approximately 190 acres, or 70%, are within existing city limits and the remainder are within the urban limit line. The map of Woodland, following the retail trade area map, identifies the city limits.

It is estimated that 98 acres are approved or zoned for general commercial development, of which 63 are within city limits. Of the 63 acres within city limits, approximately 12 acres relate to vacant space in existing shopping centers, after accounting for a stabilized vacancy rate of 10%. A total of 35 acres are outside city limits but within the urban limit line; these 35 acres relate to the proposed expansion of the County Fair mall, which may meet a significant portion of demand for general retail commercial. Also, while relocating the County Fairgrounds may open up another large site that could be designated general commercial, it is assumed that such a relocation would occur in the long term and that the site would not be available during the 1995-2015 time period.

Approximately 26 acres of central commercial is estimated to be approved or zoned within city limits. This acreage estimate relates to vacancies occurring downtown and assumes that commercial space along the Southern Pacific Railroad Corridor is redeveloped. It is anticipated that downtown retail will be quite different than shopping mall retail, with a diverse assortment of specialty and novelty items.

***E. New Retail Acres in Woodland***

As Table 5 illustrates, a total of 139 new retail acres are projected to be required to meet new retail demand in Woodland from 1995 through 2015. A total of approximately 109 new retail acres could be developed in areas with current approvals or zoning within the urban limit line, including 13 acres of neighborhood commercial. However, the 13 acres of neighborhood retail will only partially meet future demand during the 1995-2015 analysis period. Through the year 2015, 30 new neighborhood retail acres, or approximately two neighborhood shopping centers, are projected to be required in areas outside the urban limit line. The 30 new retail acres that absorb outside the urban limit line as a percentage of all new retail acres that absorb in the Woodland area represent only 21% during the 1995-2015 analysis period.

***F. Distribution of New Retail Acres by Retail Category***

As noted above, the total supply of 270 developable retail acres exceeds demand for 139 acres through the year 2015. However, new neighborhood commercial is required outside the urban limit line because the supply of neighborhood commercial is insufficient to meet future demand. An adequate supply of land exists for the other four retail categories. Table 6 shows that the supply of new neighborhood retail within the urban limit line absorbs within the first six years, but the supply of other retail acreage within the urban limit line does not fully absorb during the analysis period.

The purpose of Table 6 is to delineate how many retail acres within each retail category will be demanded over time. The bottom section of the table is an estimate of the quantity of retail acres between all five retail categories that is projected to develop over time outside the urban limit line. All 30 acres of new retail required outside the urban limit line are to meet the needs of neighborhood shopping demands; no other retail development is needed outside the urban limit line.

## II. OFFICE AND INDUSTRIAL ABSORPTION

### A. Employment Projections for Woodland

The office and industrial absorption analysis is based primarily on a forecast of employment developed by the Sacramento Area Council of Governments (SACOG). SACOG released a set of projections in April 1993 that included employment estimates to the year 2015. Many local governments within the SACOG region at the time the 1993 projections were prepared were in the midst of general plan updates, necessitating revisions to these projections. Recently, SACOG began updating their employment projections to reflect significantly less aggressive development assumptions and changes in the economy and real estate markets, and to incorporate new policy directives from local governments regarding growth.

Although still tentative at this time, SACOG provided revised projections in April 1995 for the City of Woodland that forecast a total of 35,006 jobs by the year 2015. SACOG estimated that Woodland had a total of 15,326 jobs in 1994. The projected employment growth represents an increase of 19,680 jobs through 2015, a 4.0% annual growth rate. The SACOG employment projections are organized into six different employment categories as follows:

#### SACOG EMPLOYMENT PROJECTIONS

SACOG Employment Category	1994 Employment	2015 Projection
Retail	3,698	6,183
Office	3,075	8,711
Medical	1,389	2,285
Education	805	1,141
Manufacturing	1,583	7,606
Other*	4,776	9,080
Total	15,326	35,006

\* Other employment includes jobs in: construction; transportation, communications, and utilities; wholesale trade; hotels/motels; personal, business, and legal services; automotive and miscellaneous repair; engineering, accounting, R&D, and related services; City, County, and other government services.

SACOG employs a methodology to generate their employment projections that involves assumptions about land use employment yields. SACOG converts typical non-residential land use zoning categories into various retail, office, and industrial land use designations. Using an employee-per-acre factor for each land use designation and assumptions regarding the type of employees found at each land use, employment is forecast for each employment category used by SACOG.

For example, general commercial zoning in Woodland is converted to SACOG's shopping center land use designation. Shopping center developments are assumed to consist of neighborhood, community, and regional shopping uses. Each shopping land use category has a different employee-per-acre factor, which is spread over the six employment categories. For instance, neighborhood shopping is assumed to have 25 employees per acre, spread 70% to retail employment, 10% to office employment, 20% to other employment, and none to the other three categories. Appendix A at the end of this report is a table used by SACOG to calculate the number of employees by employment category.

## ***B. Employment Categories***

As noted above, SACOG uses six different employment categories in forecasting the number of jobs Woodland can expect over time. However, this report adjusts the SACOG categories for two reasons: 1) to eliminate the "Other" category that SACOG uses; and 2) to develop employment categories that can easily be converted to land uses. Using the city's analysis of employment by major employer (approximately 100 employees or greater) and minor employer (approximately 20 to 100 employees) during the years 1993-1994, seven employment categories were created.

Table 7 presents the seven employment categories that are evaluated in the absorption analysis, together with land uses that typically produce these types of jobs. Table 7 is shown on the following page for ease of reference and is repeated with the other tables at the end of this report.

As noted above in Section I, Retail Absorption, the estimated absorption of retail acres through the year 2015 is based on the forecast of residential absorption. The calculation of retail employment is based on the retail absorption analysis rather than on SACOG's employment forecast, but results in numbers that are within approximately 10% of SACOG's projections. Education employment is not assumed to translate into office or industrial acreage, but is tracked for purposes of monitoring total employment.

# Description of Employment Categories

Table 7

<i>Employment Category</i>	<i>Typical Use</i>
<b>Retail</b>	General merchandise; groceries; apparel and accessories; home furnishings and equipment; building materials, hardware, and garden supply; repair services; automotive dealers and service stations; restaurants; theaters and other forms of recreation/amusement; personal services (e.g., dry cleaners, hair stylists); hotels/motels
<b>Education</b>	K-12 schools; junior colleges; technical institutes and vocational schools; libraries
<b>Office and Business Park (BP)</b>	Finance, insurance, and real estate; business services; legal services; construction contractors and trade operators; engineering, accounting, research, management, and related services; certain transportation, utilities, communications, and related services; City, County, and other public agency services
<b>Medical</b>	Hospitals; HMOs; medical/dental clinics and labs; nursing and personal care facilities; specialty outpatient facilities
<b>High-Tech / Bio-Tech</b>	Computer hardware/software research, development, and production; genetic engineering; human/animal/plant R&D; agribusiness
<b>Light Industrial</b>	Warehousing and storage; packaging; distribution; industrial services; light manufacturing; certain transportation, utilities, communications, and related services
<b>General Industrial</b>	Manufacturing; heavy machinery and equipment; food processing

*Source: City of Woodland; Standard Industrial Classification (SIC) Codes; David Taussig & Associates*

## **C. Job Distribution**

In order to convert employment to land use requirements, certain assumptions regarding square feet of space per employee, floor-to-area ratios (FARs), and vacancy rates were made. These three assumptions, taken together, translate into a factor for jobs per acre, which is used to convert employment to acreage. The assumptions for each employment category are presented in Table 8. These assumptions are industry standards—modified somewhat to account for job densities experienced in Woodland—and are similar to those used by SACOG.

It was noted earlier that approximately 15,326 jobs existed in Woodland in 1994. Table 8 also shows the distribution of jobs in 1994 in the city by employment category. Since Woodland is the County Seat, office employment includes city and county jobs. The office and industrial employment categories are shown below:

***DISTRIBUTION OF 1994 EMPLOYMENT BY EMPLOYMENT CATEGORY***

<i>Employment Category</i>	<i>Percentage</i>
Office / Business Park	26.9%
Medical	9.1%
High-Tech / Bio-Tech	0.2%
Light Industrial	18.7%
General Industrial	12.4%
Total (excluding Retail and Education)	67.2%

***D. Existing Supply of Office and Industrial Acres in the Woodland Area***

Table 9 delineates the potential number of office and industrial acres that could be built in the Woodland area based on existing land use approvals and zoning. A total of 1,317 acres, including 200 acres designated for business park uses, of supply of industrial land currently exists. Of the 1,317 acres, approximately 386 acres (30%) are within existing city limits, approximately 536 acres (40%) are within the urban limit line, and approximately 395 acres (30%) are outside the urban limit line. One of the largest sources of supply are the Spreckels and Knaggs annexation areas totaling 320 acres in the northeast part of the planning area within the urban limit line.

***E. New Office and Industrial Acres in Woodland***

As Table 10 illustrates, a total of 987 new office/business park and industrial acres are projected to absorb in Woodland from 1995 through 2015. Approximately 143 of the 987 acres, or 14%, would be required to meet the needs of business park users. All of the demand for business park and industrial land through the year 2015 could be satisfied by areas with current approvals or zoning. Of the 845 acres of new industrial land required, approximately 123 acres would be outside the urban limit line.

***F. Distribution of New Office and Industrial Acres***

As noted above, demand for new office and industrial acres is based on employment growth, which is grouped into seven employment categories in this report. SACOG's

Note that while retail, education, and medical employment decline as a percentage of total employment, all three categories experience growth that relates directly to population growth.

Table 11 shows the results of the distribution assumptions. As noted earlier in Table 8, office/business park employment growth is estimated to absorb into central commercial areas (10%), general commercial areas (20%), and business park areas (70%). Medical employment is assumed to relate strictly to general commercial land uses and high/bio-tech employment is assumed to relate to business park land uses. Light industrial and general industrial employment are grouped together into one industrial category. Therefore, employment projections translate into demand for the following four land use categories:

- Central Commercial (CC)
- General Commercial (GC)
- Business Park (BP)
- Industrial (I)

Table 11 presents how many business park and industrial acres will be demanded over time, as well as how many central commercial and general commercial acres will be required to meet office-related demand in addition to retail-related demand discussed above in Section I, Retail Absorption. The bottom section of the table is an estimate of the quantity of business park and industrial acres that are projected to develop over time, all of which are in areas with current approvals and zoning.

### *III. CONCLUSIONS*

The non-residential absorption estimates relate to employment growth in the city, which is expected to be strong during the 21-year timeframe of the analysis. Table 12 illustrates the employment growth projected to occur in Woodland through the year 2015. Total employment is expected to increase by 19,680 over the next 21 years, a 4.0% compounded annual growth rate. Industrial and office employment are expected to grow at the fastest rates—5.0% and 4.1% per year, respectively. The high growth rates in these two areas reflect the following major assumptions:

- The City will achieve many of the goals articulated in its Economic Development Strategic Plan. These include revitalization of historic downtown and development of other related city areas through the Downtown Specific Plan, and attraction of clean, high-wage industries such as agribusiness, bio-tech, and high-tech.
- Given its good road, rail, and air transportation access, its location relative to the San Francisco Bay Area and Central Valley, and other strategic advantages, the City will continue to attract warehousing, distribution, and other forms of light industrial development.

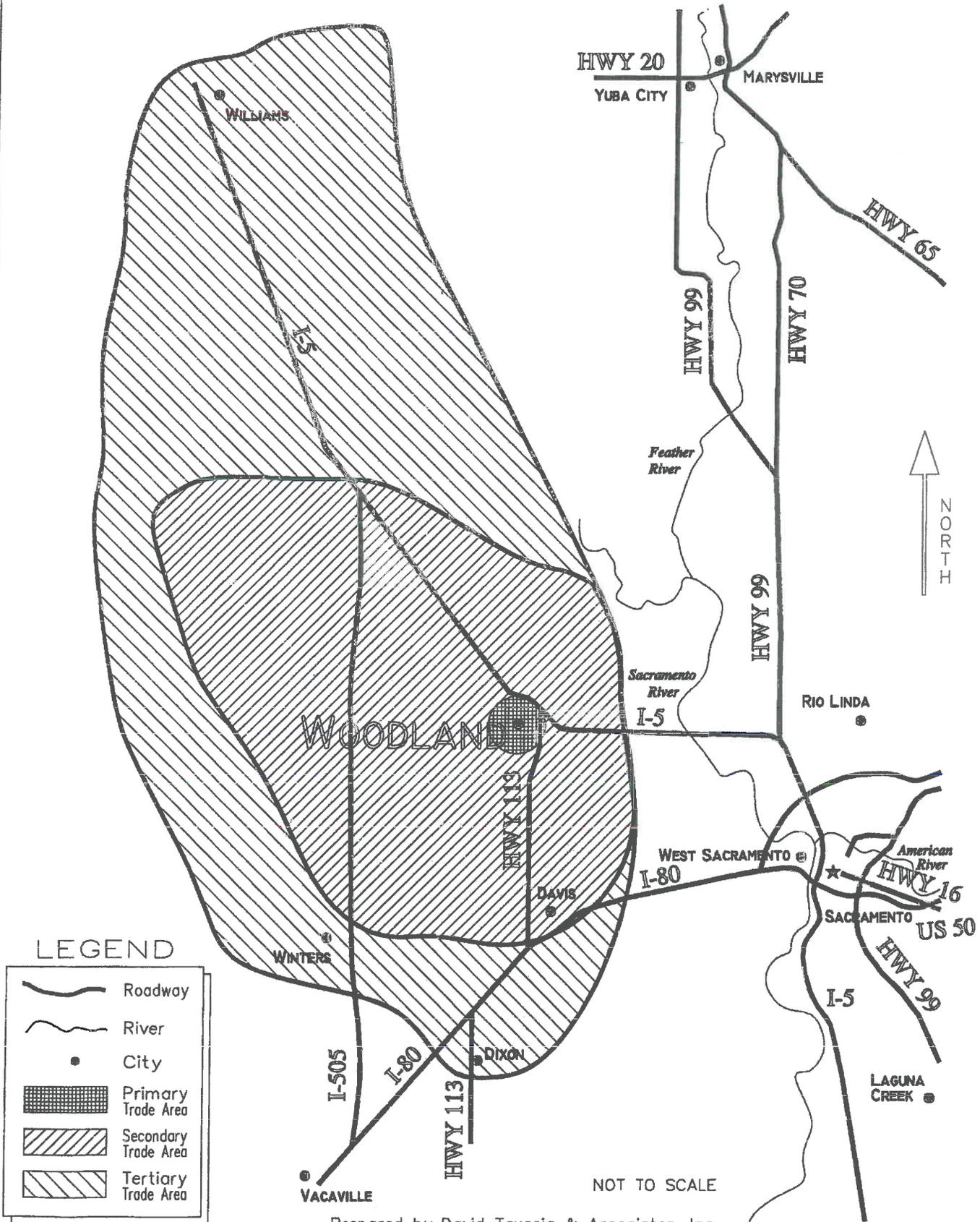
A total of 19,680 new jobs and an employment growth rate of 4.0% per year represent significant non-residential growth for Woodland. However, this non-residential growth can be put into context by relating it back to residential growth projected in the Residential Absorption Analysis. As Table 12 indicates, a total of 24,826 housing units and 35,006 jobs are anticipated within the city by the year 2015. The jobs:housing ratio in the city will climb from 0.70 in 1994 to 1.02 in 2015, meaning that the number of jobs available in the city will approximate the number of working individuals who live in the City. Housing affordability and other issues must be considered in fully analyzing a jobs:housing balance for an area, but this cursory analysis suggests that Woodland will be a relatively balanced community by the year 2015.

A summary of other major findings and conclusions is provided below:

- Woodland is capturing a considerable amount of retail sales from shoppers who live outside the city. The city should continue to experience this phenomenon through the year 2015.
- Of the 140 new retail acres needed by the year 2015, approximately 110 will be developed inside existing City limits or within the urban limit line based on current approvals and zoning. This represents approximately 80% of all retail development projected to occur through the year 2015. All 30 acres of new retail to be developed outside existing City limits will be neighborhood retail; no additional retail development is needed outside the urban limit line.

- Of the nearly 1,000 new business park and industrial acres needed by the year 2015, approximately 120 will be developed outside the urban limit line but in areas with current approvals or zoning. Business park and industrial development inside existing City limits represents approximately 40% of all such development projected to occur through the year 2015.
- Table 13 compares the demand for commercial and industrial land uses to the supply for such land uses. The major highlights from Table 13 include the following:
  - Demand for central commercial relates to retail and office demand and is approximately equal to the supply of vacant space downtown and along the Southern Pacific Railroad Corridor.
  - Almost 60% of the demand for general commercial relates to office uses. Total supply of land designated general commercial, including approximately 12 acres of vacant space in existing shopping centers, is nearly the same as demand for such space.
  - There appears to be a surplus of land designated for service and highway commercial. This surplus of approximately 90 acres may be converted to residential uses of relatively high density or reserved for future retail development beyond the year 2015.
  - An adequate supply of business park and industrial land exists to meet demands well beyond the 2015.

# City of Woodland Retail Trade Areas

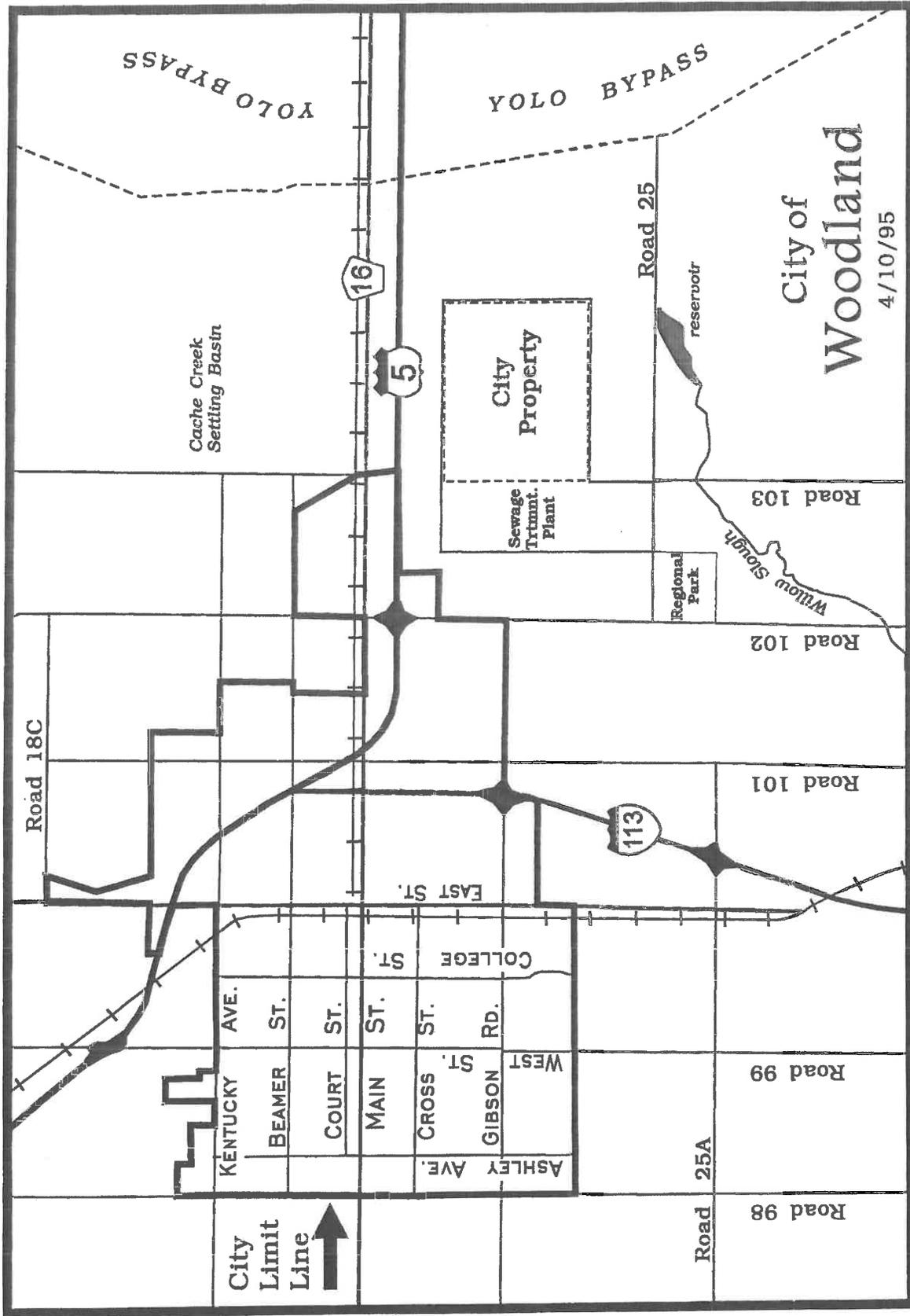


## LEGEND

	Roadway
	River
	City
	Primary Trade Area
	Secondary Trade Area
	Tertiary Trade Area

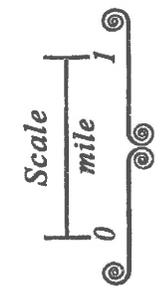
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Prepared by David Taussig & Associates, Inc.



City of  
Woodland

4/10/95



**Table 1**  
**Woodland Retail Sales Leakage Analysis**

<b>Demand vs Supply</b>	<b>1987</b>	<b>1990</b>	<b>1993</b>
(constant 1993 \$000)			
<b><u>Demand for Retail Stores</u></b>			
# of Households	12,363	14,198	14,852
Average Household Income (\$)	\$41,800	\$41,800	\$41,800
% of Income Spent on Retail Items	40%	40%	40%
Total Purchasing Power	\$206,709	\$237,391	\$248,325
<b><u>Supply of Retail Stores</u></b>			
Total Retail Sales	\$448,784	\$420,989	\$407,548
<b>Capture / (Leakage)</b>	\$242,075	\$183,599	\$159,223
<b>Ratio of Supply vs Demand</b>	2.17	1.77	1.64

Source: CA Dept of Finance; CA State Board of Equalization; Urban Decision Systems;  
US Dept of Labor Consumer Expenditure Survey; David Taussig & Associates

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**Table 2**  
**City of Woodland Retail Assumptions**

<b>Retail Trade Areas</b>	<b>Purchasing Power Ratio of Trade Area to Primary Area</b>
<b>(\$000)</b>	
Primary Trade Area (City of Woodland)	1.0
Secondary Trade Area (Yolo County excluding West Sacramento and Winters)	3.1
Tertiary Trade Area (Secondary Trade Area plus Winters, Dixon, and South Colusa County)	3.8

<b>Other Retail Assumptions</b>	<b>Neighborhood Retail</b>	<b>Other Retail</b>
Real Household Income Annual Growth Rate	1.0%	1.0%
% of Household Income Spent on Retail Category	17%	26%
Floor-to-Area Ratio (FAR)	0.25	0.25
Stabilized Vacancy Rate	10%	10%
Retail Sales per SF	\$175	\$225
Capture Rates:		
Primary Trade Area	100%	75%
Secondary Trade Area	0%	45%
Tertiary Trade Area	0%	25%
Land Use Designations:		
Neighborhood Commercial (NC)	100%	0%
Central Commercial (CC)	0%	10%
General Commercial (GC)	0%	40%
Service Commercial (SC)	0%	20%
Highway Commercial (HC)	0%	30%

Source: US Dept of Labor Consumer Expenditure Survey, Urban Land Institute, Dollars & Cents of Shopping Centers, Economic & Planning Systems, David Taussig & Associates

**Table 3**  
**City of Woodland**  
**Projected Home Price and Household Income**

Residential Category	Average Monthly Rent or Home Price	Average Household Income
Multi-Family Rental	70% \$600	\$24,000
Ownership	30% \$90,000	\$30,000
Small Lot (< 5,000 sf)	\$130,000	\$43,000
Standard Lot (5,000 - 6,500 sf)	\$160,000	\$53,000
Large Lot (6,501 - 8,000 sf)	\$190,000	\$63,000
Estate Lot (> 8,000 sf)	\$230,000	\$77,000
Rural Residential (2 - 10 Ac)	\$375,000	\$125,000

Source: Yolo County Buyer's Guide, Mar/Apr 1995; New Home Trends; Future Home Trends;  
Yolo County Board of Realtors; Woodland and Sacramento area brokers; David Taussig & Associates

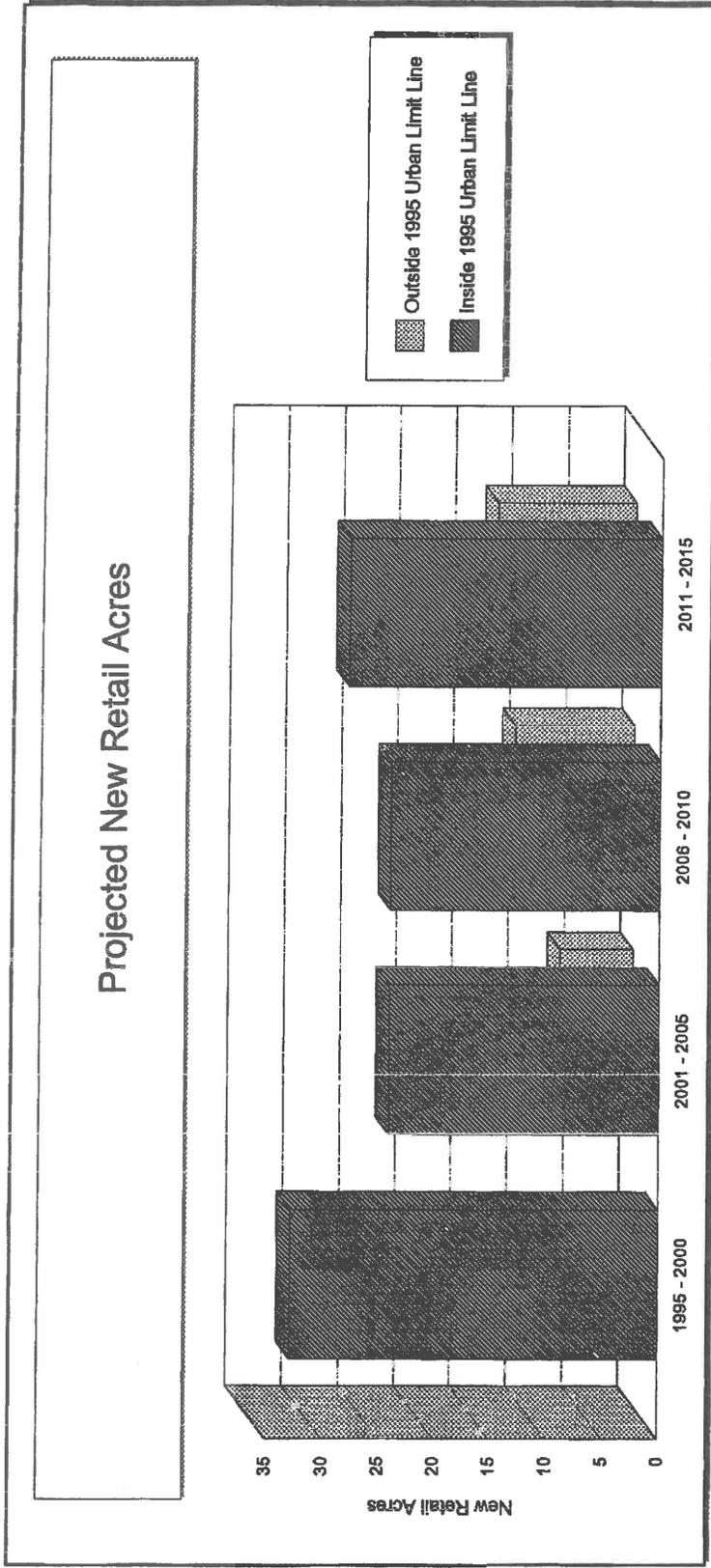
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**Table 4**  
**Potential Retail Acres to be Developed in Woodland**  
**Based on Current Approvals and Zoning**

<b>Land Use Designation</b>	<b>Acres Within City Limits</b>	<b>Acres Within Urban Limit Line</b>	<b>Acres Outside Urban Limit Line</b>	<b>Total</b>
<sup>1</sup> Neighborhood Commercial (NC)	13			13
<sup>2</sup> Central Commercial (CC)	26			26
<sup>3</sup> General Commercial (GC)	63	35		98
Service Commercial (SC)	12	34		46
<sup>4</sup> Highway Commercial (HC)	77	10		87
<b>Total</b>	<b>191</b>	<b>79</b>	<b>0</b>	<b>270</b>

<sup>1</sup> All 13 acres of proposed neighborhood retail are in the Southeast Area.  
<sup>2</sup> Assumes that the current downtown vacancy rate of 20% will decline to 5%, with 75% of decline attributable to retail and 25% attributable to office; also assumes that a similar amount of retail/office space along the SPRR Corridor is revitalized and occupied. Acreage is based on an FAR of 0.25.  
<sup>3</sup> Of the 63 acres within City limits, approximately 12 relate to vacant space in existing shopping centers.  
<sup>4</sup> Of the 77 acres within City limits, 51 relate to the proposed auto mall.

**Table 5**  
**City of Woodland New Retail Acres: 1995 - 2015**



Growth Area	Years				Total
	1995-2000	2001-2005	2006-2010	2011-2015	
Inside Urban Limit Line	33	24	24	28	109
Outside Urban Limit Line	0	7	11	12	30
Total Acres	33	31	35	40	139
% Outside Urban Limit Line	0%	21%	31%	31%	21%

**Table 6**  
**City of Woodland**  
**Distribution of Future Retail Demand and Absorption**

<i>Distribution of Demand and Absorption</i>	1995- 2000	2001- 2005	2006- 2010	2011- 2015	Total
Total Demand for New Homes	2,246	2,006	2,248	2,504	9,004
Average Household Income During Time Interval (1995\$)	\$48,000	\$50,000	\$51,000	\$53,000	
<b><u>Total Demand for New Retail Space</u></b>					
Neighborhood Commercial (NC)	10	9	11	12	43
Central Commercial (CC)	2	2	2	3	10
General Commercial (GC)	9	9	10	11	38
Service Commercial (SC)	5	4	5	6	19
Highway Commercial (HC)	7	6	7	8	29
Total Acres	33	31	35	40	139
<b><u>Demand Absorbed in Areas with Existing Zoning</u></b>					
Neighborhood Commercial (NC)	10	3	0	0	13
Central Commercial (CC)	2	2	2	3	10
General Commercial (GC)	9	9	10	11	38
Service Commercial (SC)	5	4	5	6	19
Highway Commercial (HC)	7	6	7	8	29
Total Acres	33	24	24	28	109
<b><u>Demand Absorbed in New General Plan Areas</u></b>					
Neighborhood Commercial (NC)	0	7	11	12	30
Central Commercial (CC)	0	0	0	0	0
General Commercial (GC)	0	0	0	0	0
Service Commercial (SC)	0	0	0	0	0
Highway Commercial (HC)	0	0	0	0	0
Total Acres	0	7	11	12	30

**Table 7**  
**Description of Employment Categories**

<b>Employment Category</b>	<b>Typical Use</b>
<b>Retail</b>	General merchandise; groceries; apparel and accessories; home furnishings and equipment; building materials, hardware, and garden supply; repair services; automotive dealers and service stations; restaurants; theaters and other forms of recreation/amusement; personal services (e.g., dry cleaners, hair stylists); hotels/motels
<b>Education</b>	K-12 schools; junior colleges; technical institutes and vocational schools; libraries
<b>Office and Business Park (BP)</b>	Finance, insurance, and real estate; business services; legal services; construction contractors and trade operators; engineering, accounting, research, management, and related services; certain transportation, utilities, communications, and related services; City, County, and other public agency services
<b>Medical</b>	Hospitals; HMOs; medical/dental clinics and labs; nursing and personal care facilities; specialty outpatient facilities
<b>High-Tech / Bio-Tech</b>	Computer hardware/software research, development, and production; genetic engineering; human/animal/plant R&D; agribusiness
<b>Light Industrial</b>	Warehousing and storage; packaging; distribution; industrial services; light manufacturing; certain transportation, utilities, communications, and related services
<b>General Industrial</b>	Manufacturing; heavy machinery and equipment; food processing

**Table 8**  
**Woodland Job Distribution**

<b>Employment Category</b>	<b>Land Use Categories</b>	<b>SF per Employee</b>	<b>Floor-Area Ratio</b>	<b>Vacancy Rate</b>	<b>Jobs per Acre</b>	<b>1994 Job Distribution</b>
<b>1 Retail</b>	NC, CC, GC, SC, HC	400	0.25	10.0%	25	4,219 27.5%
<b>1 Education</b>	Schools	NAP	NAP	NAP	NAP	805 5.3%
<b>Office / Business Park (BP)</b>	CC (10%) GC (20%) BP (70%)	350	0.30	8.0%	34	4,117 26.9%
<b>Medical</b>	General Commercial	250	0.25	8.0%	40	1,389 9.1%
<b>High-Tech / Bio-Tech</b>	Business Park (BP)	465	0.35	8.0%	30	34 0.2%
<b>Light Industrial</b>	Industrial	1,800	0.40	6.0%	9	2,870 18.7%
<b>General Industrial</b>	Industrial	1,000	0.40	6.0%	16	1,893 12.4%
<b>Total</b>						15,326 100.0%

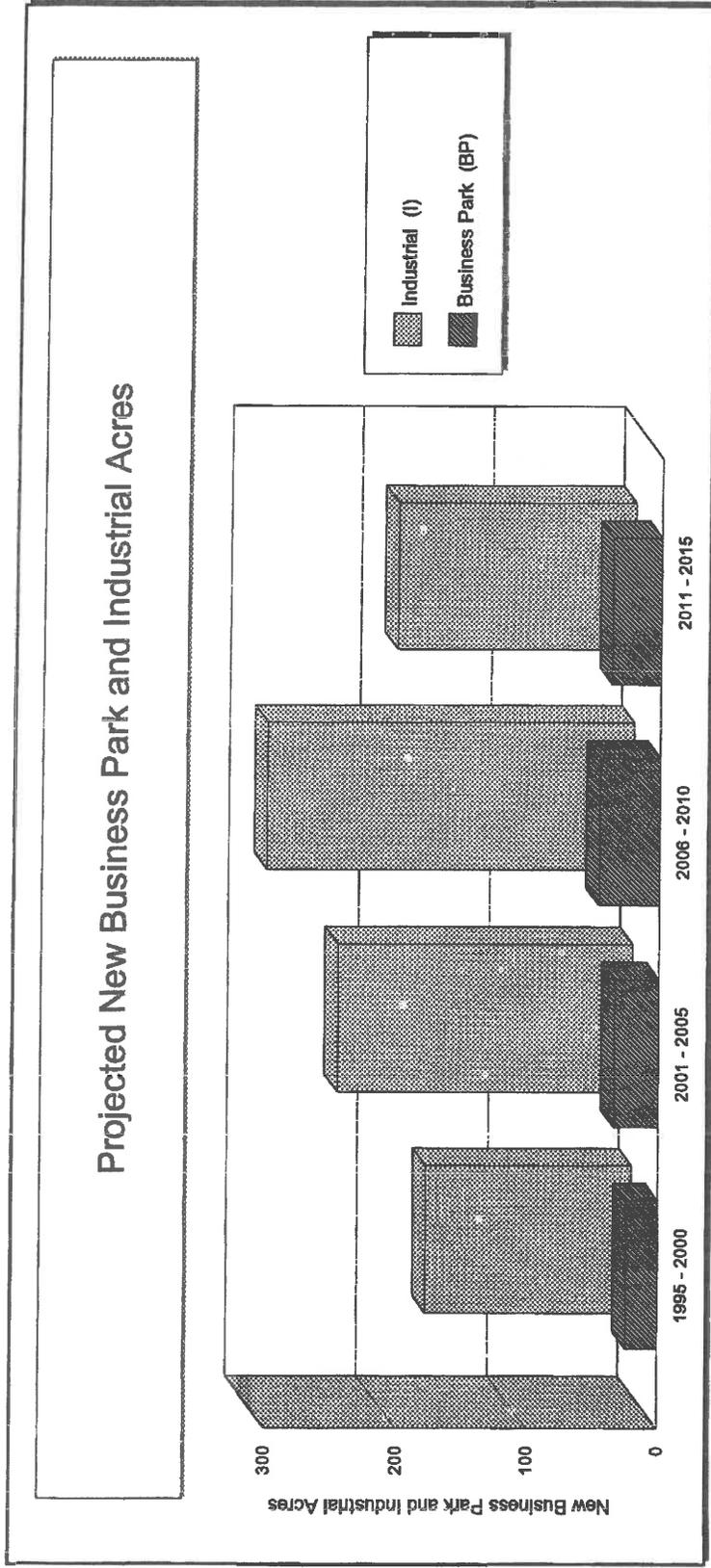
**1 Retail acreage calculated separately based on housing units; school acreage not determined as part of this analysis.**

**Table 9**  
**Potential Office/Industrial Acres to be Developed in Woodland**  
**Based on Current Approvals and Zoning**

Land Use Designation	Acres Within City Limits	Acres Within Urban Limit Line	Acres Outside Urban Limit Line	Total
Business Park (BP)	200			200
Industrial (I)	386	336	395	1,117
<b>Total</b>	<b>386</b>	<b>536</b>	<b>395</b>	<b>1,317</b>

Source: City of Woodland; 1982 Downtown Commercial Space Inventory; Jim Neekel Realty; The Elkins Company; David Taussig & Associates

**Table 10**  
**City of Woodland New Business Park and Industrial Acres: 1995 - 2015**

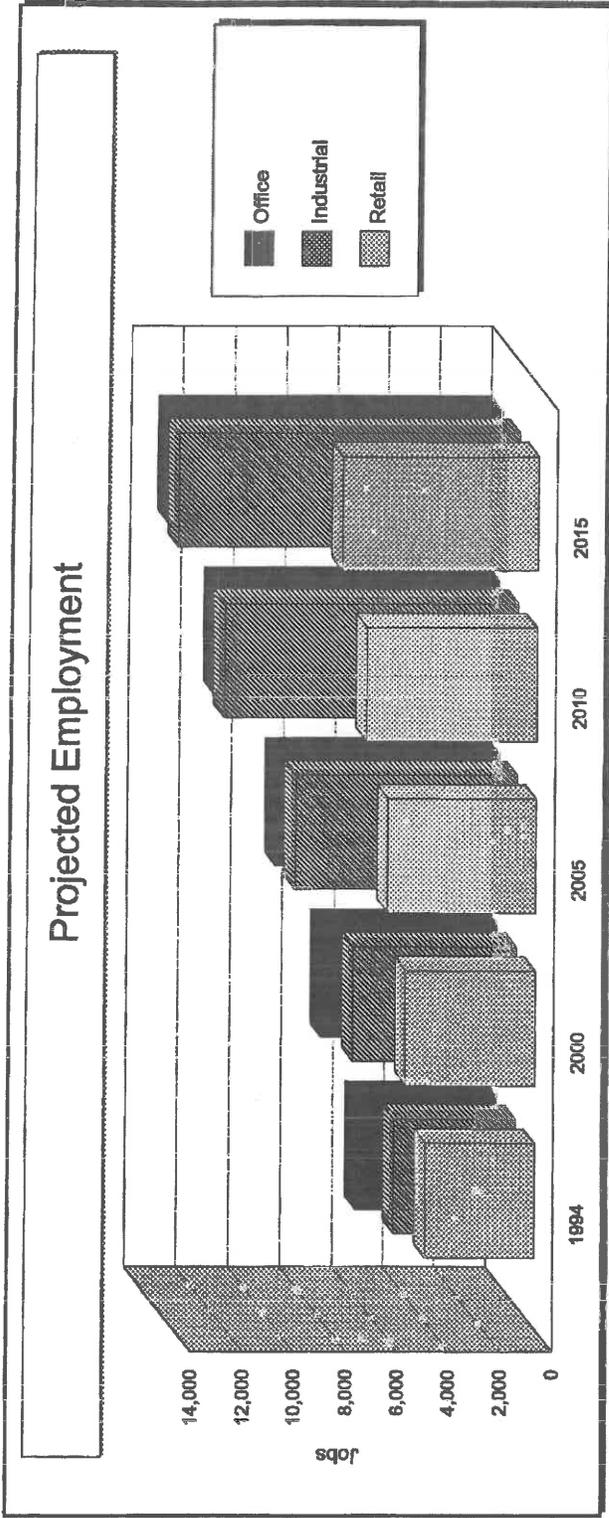


Growth Area	Years				Total
	1995-2000	2001-2005	2006-2010	2011-2015	
Business Park (BP)	25	34	46	37	143
Industrial (I)	158	225	280	182	845
Total Acres	182	260	326	219	987
% Business Park	14%	13%	14%	17%	14%

**Table 11**  
**City of Woodland**  
**Distribution of Future Office/Industrial Demand and Absorption**

<i>Distribution of Demand and Absorption</i>	1995-2000	2001-2005	2006-2010	2011-2015	Total
<b>Total Employment Growth (per SACOG)</b>	3,868	4,935	6,213	4,664	19,680
<b><u>Distribution of Employment Growth</u></b>	<b><u>As of 1994</u></b>				
Retail	21%	15%	14%	21%	21.8%
Education	2%	2%	2%	1%	3.3%
Office / Business Park	28%	29%	30%	31%	28.4%
Medical	5%	5%	5%	3%	6.5%
High-Tech / Bio-Tech	2%	3%	4%	5%	2.1%
Light Industrial	31%	36%	36%	31%	27.2%
General Industrial	11%	10%	9%	8%	10.7%
<b>Total</b>	<b>100.0%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100.0%</b>
<b><u>Total Demand for New Office and Industrial Space</u></b>					
Central Commercial (CC)	3	4	5	4	16
General Commercial (GC)	11	14	19	12	56
Business Park (BP)	25	34	46	37	143
Industrial (I)	158	225	280	182	845
<b>Total Acres</b>	<b>197</b>	<b>278</b>	<b>350</b>	<b>235</b>	<b>1,060</b>
<b><u>Business Park and Industrial Demand Absorbed in Areas with Existing Zoning</u></b>					
Business Park (BP)	25	34	46	37	143
Industrial (I)	158	225	280	182	845
<b>Total Acres</b>	<b>182</b>	<b>260</b>	<b>326</b>	<b>219</b>	<b>987</b>

**Table 12**  
**City of Woodland Projected Growth: 1995 - 2015**



Growth Category	Year					21-Year Compounded Growth Rate
	1994	2000	2005	2010	2015	
<b>Employment</b>						
Office	5,540	6,893	8,719	11,142	12,961	4.1%
Industrial	4,763	6,387	8,657	11,453	13,272	5.0%
Retail	4,219	5,031	5,771	6,641	7,621	2.9%
Education	805	882	981	1,105	1,152	1.7%
<b>Total</b>	<b>15,326</b>	<b>19,194</b>	<b>24,129</b>	<b>30,342</b>	<b>35,006</b>	<b>4.0%</b>
<b>Population</b>						
Housing Units	42,474	48,100	53,100	58,600	64,700	2.0%
	15,822	18,068	20,074	22,322	24,826	2.2%
<b>Jobs:Housing Ratio*</b>	<b>0.70</b>	<b>0.77</b>	<b>0.87</b>	<b>0.98</b>	<b>1.02</b>	

\* Employed residents per household was 1.15 in 1980 and 1.30 in 1990. Analysis assumes that employed residents per household averages 1.45 during the period 1995-2015.

**Table 13**  
**City of Woodland**  
**Estimated Supply and Demand of Non-Residential Acreage**  
**1995 - 2015**

Land Use Designation	Retail Demand	Office Demand	Industrial Demand	Total Demand	Total Supply	Surplus / (Deficit)
<b><u>Commercial</u></b>						
Neighborhood Commercial (NC) *	43			43	43	0
Central Commercial (CC)	10	16		26	26	0
General Commercial (GC)	38	56		95	98	3
Service Commercial (SC)	19			19	46	27
Highway Commercial (HC)	29			29	87	58
Subtotal	139	73	0	211	300	89
<b><u>Industrial</u></b>						
Business Park (BP)		143		143	200	57
Industrial (I)			845	845	1,117	272
Subtotal	0	143	845	987	1,317	330
<b>Total Acres</b>	139	215	845	1,199	1,617	418

\* 13 acres of supply are within City limits; remaining 30 acres are assumed to be included with new residential land uses.

Source: David Taussig & Associates

05/26/95

***APPENDIX A***

***SACOG EMPLOYMENT YIELDS BY ZONING CATEGORY***

**RETAIL, OFFICE, MEDICAL & MANUFACTURING YIELDS BY ZONING CATEGORY**

ZONING/ USE CATEGORY	EMP/ ACRE	RETAIL %	OFFICE %	MEDICAL %	MANUF %	OTHER %	BP	SC 10%	LC 50%	GC	AC	TC	CO	M1	M2	MP
Neighborhood SC	25	70%	10%			20%		10%	30%	20%	10%	10%	5%	5%		
Community SC	16	85%	5%			10%		40%								
Commercial Strip	20	60%	20%	10%		10%		50%	30%	20%	10%	10%	5%	5%	5%	5%
Regional Shopping	30	95%	2%	1%		2%										
Restaurant	100	100%							5%			20%	5%			5%
Auto Dealers	22	100%														
Neighborhood Office	30	5%	85%	5%		5%	40%		5%	5%	80%					
Commercial Office	47	5%	90%	5%		30%			5%	10%				10%	5%	60%
Medical Office	38	5%		95%		10%			5%							
Financial Institutions	37	0%	95%			5%	20%		5%							
Lt. Ind-Ind Production	20	5%	5%		65%	25%			5%	35%	10%		5%	35%	30%	10%
Research & Development	27	0%	20%		70%	10%										
Warehousing	12	0%	5%		25%	70%				15%				35%	20%	10%
Yard Use	3	100%			10%	80%				10%				15%	40%	
Outdoor Recreation	5	10%	5%			85%							85%			
Hotel & Motel	18	0%				100%				5%		70%	100%	100%	100%	100%
<b>Total</b>							100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

<b>Retail Employees</b>	1,495	21,44	17,52	4,115	18.9	21.2	6,075	1.23	1,1375	7.11
Office Employees	29,92	0.87	5,4825	5.47	0.5	0.4	0.4625	4.98	2,735	27,7675
Medical Employees	4,915	0.15	2.48	0.635	0.2	0.2	0.1	0.335	0.2175	1.51
Manufacturing Emps	0	0	0	5.03	1.3	0	0.65	5.645	4.62	2.545
Other Employees	0.97	1.44	3.2675	4.55	0.7	12.8	3.9625	5.15	4.24	1.6675
<b>Total per Acre</b>	37.3	23.9	28.75	19.8	21.6	34.6	11.25	17.35	12.95	40.8