



Appendix J

Urban Decay Analysis Technical Memorandum

Urban Decay Analysis Technical Memorandum

Coffee and Rosedale Commercial Retail Development Project

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Prepared By:

City of Bakersfield: Development Services – Planning Division

Roque Nino, Principal Planner
1715 Chester Avenue, 2d Floor
Bakersfield, CA 93301

Prepared By:

PlaceWorks

3 MacArthur Place, Ste. 1100
Santa Ana CA 92707
714-966-9220

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Summary

This memorandum provides an analysis of retail market demand in the metropolitan Bakersfield area to determine the potential of the proposed Rosedale and Coffee Commercial Development Project to cause urban decay impacts. This analysis was originally prepared in 2023 and has been updated to reflect a change in the proposed project during the entitlement process and changes in market conditions during that time.

Areas Analyzed

The analysis defines the trade area for the proposed project, which is the area from which retail businesses at the proposed project are likely to draw the majority of their customers. As shown in Figure 3 on page 10, this trade area is generally located north of the Westside Parkway/Stockdale Highway and west of the 99 freeway/Airport Drive/Granite Road, and extending north and west from the proposed project about eight miles.

To assess the potential impacts to similar-scale retail centers outside of this defined trade area, the report also defines three other trade areas for analysis. For southwest Bakersfield, which includes the Gosford Village and River Walk shopping centers, the trade area is generally located south of Westside Parkway/Stockdale Highway and west of the 99 freeway, extending out about eight miles to the south and west from Gosford Village, as shown in Figure 4 on page 11.

The final trade area is a regional trade area for both Downtown and Valley Plaza Mall. As shown in Figure 5 on page 12, this area is defined as being within 12 miles from Downtown. The report provides an analysis for this overall regional trade area and a separate analysis for this trade area but excluding the trade areas for the proposed project and for Gosford Village.

Time Frame

The analysis estimates the current unmet market demand currently, as of 2025. In addition, to account for the cumulative impact of other retail developments that may occur in the near term, the analysis also estimates the remaining market demand in 2030.

Unmet Market Demand

As presented in this report, the analysis estimates the unmet market demand—the amount of retail building space that could be supported by consumer spending of trade area households that occurs outside of the trade area. The estimate for 2025 reflects the unmet demand after the development of the proposed project. The estimate for 2030 reflects the development of the

pipeline supply of other planned retail development projects. The resulting market demand estimates are shown in the following table.

Estimated Market Demand (gross floor area, square feet) After Proposed Project and Pipeline Supply of New Retail Development by Trade Area, 2025 and 2030

	Trade Area			
	Proposed Project	Gosford Village/ River Walk	Downtown / Valley Plaza Mall	Downtown less Proposed Project and Gosford Village
2022 Estimated Market Demand (after the proposed project)	175,000	864,000	2,330,000	1,295,000
2027 Estimated Market Demand (after pipeline supply)	159,070	(183,000)	850,000	893,000

The analysis shows that with the proposed project, each of the trade areas would still have unmet market demand in 2025. Furthermore, in 2030, after the construction of pipeline projects that are envisioned and may become operational, each of the trade areas will still have unmet market demand for additional retail businesses.

The one exception is the Gosford Village / River Walk trade area. However, this trade area includes two potential retail developments that are not currently in the process of moving forward through site plan review. The first is the Crossroads Plaza Commercial Center, located the northwest corner of Panama Lane and Gosford Road, south of the existing Gosford Village Shopping Center. In 2010, the City certified the EIR for this project with 786,000 square feet of retail building space. In 2024, the City approved a site plan for 312,030 square feet of commercial building space on a portion of the site, leaving the potential for up to 473,970 square feet of retail building space to fill out the site. The second potential development is Bakersfield Gateway Center at Hosking Avenue and H Street / CA-99. This could include 484,000 square feet of commercial building space. It is not clear that these two potential developments in this trade area would be moving forward to be fully operational by 2030. If all the potential retail projects in the Gosford Village / River Walk trade area were to be developer and operational by 2030, retail vacancies could occur. However, this result would occur regardless if the proposed project is developed.

Findings

The analysis finds that the proposed project is not expected to exceed market demand and, thus, will not cause long-term vacancies that could result in urban decay.

1. Introduction

In 2004 the California Court of Appeals ruled that an environmental impact report should determine whether two proposed retail developments could cause long-term vacancies in other competitive retail centers, leading to urban decay. Followers of Jane Jacobs might herald this court ruling as a new tool for neighborhood preservation. Advocates of Joseph Schumpeter might decry this as judicial interference with the natural transformation of an economy, in which creative destruction fuels long-term economic growth. Regardless of philosophical bent, developers proposing retail now consider market demand and the potential impacts of exceeding that demand.

This market study analyzes the demand for retail building space in the Bakersfield area. It assesses the likelihood the proposed commercial development would exceed the demand. Finally, if the proposed development would exceed market demand, the market study identifies potential impacts.

The market study was originally prepared for the initial project submission in 2023. During the entitlement process, the project was modified. Most importantly for this analysis, the size of the project and the amount of retail building space was reduced. This analysis has been updated to reflect the smaller project size. The consumer spending estimates have been updated using the US Consumer Price Index and the store sales estimates have been updated with the US Producer Price Index. Finally, the consultants re-vetted the estimated pipeline supply of new retail development with the City of Bakersfield.

1A. Regional Location

The project site encompasses approximately 46 acres at the southwest corner of Rosedale Highway and Coffee Avenue 7 in the City of Bakersfield, as shown on Figure 1. Rosedale Highway is a main east-west route through Bakersfield, becoming state route CA-178 as it traverses downtown. Coffee Avenue is a north-south arterial running the length of the city. On the north side of Rosedale is the Northwest Promenade shopping center, a major community-scale commercial center.

1B. Proposed Development

The proposed project is to construct 405,531 gross square feet of commercial building space on the site. A portion of this square footage is tentatively expected to be used for services (car wash, health club, medical offices, a bank, and public storage). The analysis excludes the 89,158 square feet of building space intended for services because these are not retail sales uses, which is the typical concern for urban decay impacts. Thus, the analysis determines

the potential for 316,373 square feet of new retail building space in the proposed project to generate urban decay impacts.

For initial project submission, the proposed project included 423,292 square feet of commercial building space and 398,222 square feet of retail space that was analyzed.

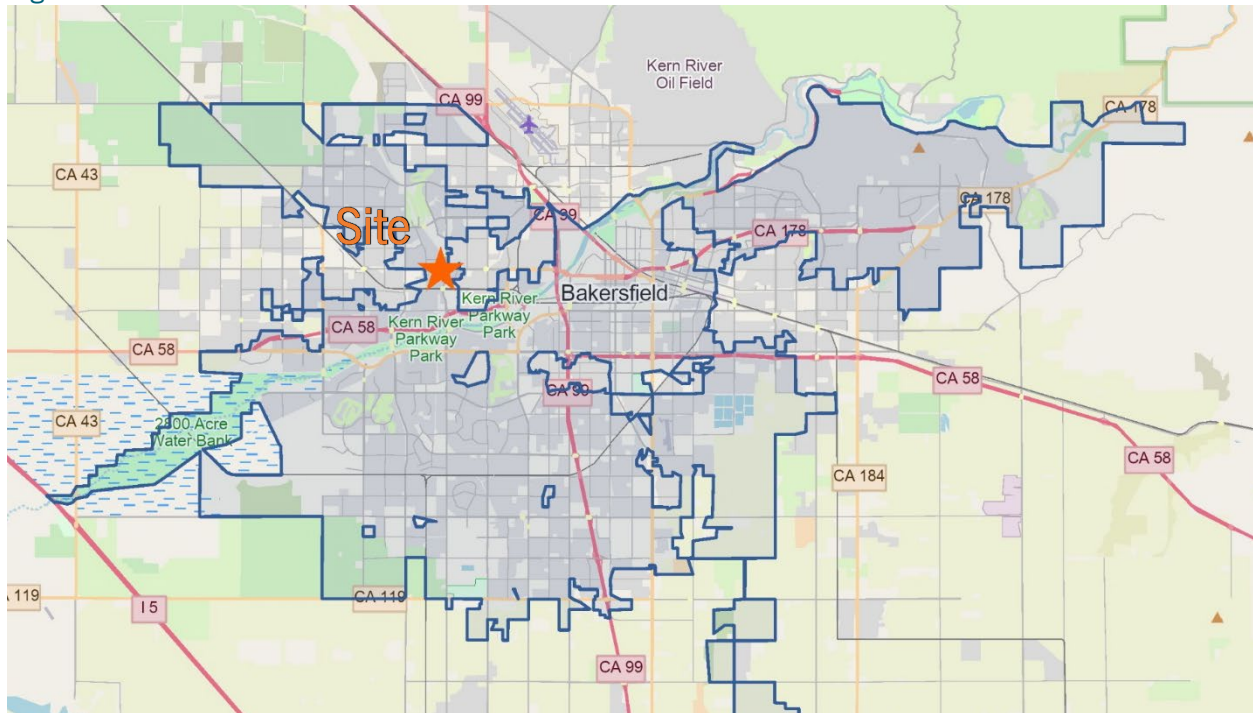
1C. Methodology

Four steps make up the basic retail market analysis methodology used to assess the potential for urban decay impacts.

Define the Trade Area

In general terms, the trade area is the geographic area from which the retail center will draw most of its customers. Several factors affect the size and

Figure 1: General Site Location



boundaries of the trade area, including the type of shopping center, location of competitive retail facilities, and visibility and access to major roads and highways.

The analysis considers not only the trade area for the proposed project but also the trade area for competitive facilities/districts that may be impacted by the new retail project.

Determine the Surplus/Gap Under Current Conditions

The analysis then calculates the difference between trade-area households' consumer spending and retail sales at trade-area businesses to determine

whether the market can currently support additional retail development. This is calculated for the proposed project's trade area and the trade area for competitive facilities/districts.

Forecast Trade Area Growth

The analysis projects household growth in each trade area, typically five years out. This provides an assessment of the potential urban decay impacts over the short-term time frame for new retail buildings to be fully constructed and become fully occupied and operational.

Urban Decay Determination

The final step is to make a final determination of the proposed project's potential to cause urban decay impacts.

1D. Retail Types, Part 1: Convenience Goods

Generally, the goods and services that most people need on a regular basis (convenience goods and services) are close to where people live. For these regular purchases, most consumers have built up knowledge of where to go to get what they want, whether their discriminator is price and convenience (most often) or quality (on occasion). Groceries, medicines, and hair care are typical convenience goods and services. Because convenience goods and services usually have low cost margins and high sales volumes, convenience retailers are located throughout an area, close to concentrations of households. Convenience-scale retail centers range from a single store to a small retail center of about 20,000 square feet. They typically have a convenience store as an anchor and draw from a trade area with about a half-mile radius. Neighborhood-scale retail centers range from about 20,000 to 100,000 square feet in size. Pharmacies and supermarkets typically anchor neighborhood-scale shopping centers. The neighborhood trade area encompasses a 1½-mile radius, serving a population of up to 40,000 people within a 5- to 10-minute drive.

1E. Retail Types, Part 2: Comparison Goods

Consumers tend to compare goods across brands and across retailers for items they purchase infrequently or rarely. This habit of comparing induces retailers to locate near each other. It also promotes larger-scale retailers who can stock many different brands of similar products. Clothing, electronics, and furniture are quintessential comparison goods. Because comparison goods have higher cost margins and lower sales volumes and because consumers purchase these goods infrequently, comparison goods retailers tend to locate close to major transportation corridors that give access to a greater number of consumers. Table 1 describes the sizes and trade areas for the shopping center types that focus on comparison goods.

Table 1
Comparison Goods Shopping Center Types

Shopping Center Type	Building Size Range (sq. ft.)	Trade Area	
		Size (radius in miles)	Population Range
Community	100,000–450,000	3–5	40,000–150,000
Regional	300,000–900,000	8	150,000 or more
Super-regional	500,000–2 million	12	300,000 or more

Source: Beyard, Michael D. et al., Shopping Center Development Handbook, 3rd ed., Washington D.C.: Urban Land Institute, 1999.

1F. Current Economic Conditions

The retail market is still evolving from the impact of the COVID-19 pandemic, stay-at-home orders, and the subsequent round of inflation. As of the preparation of this report, there were still active disagreements among economists as to whether the economy would go through a recession this year.

It is well beyond the scope of this type of analysis to prognosticate on the future trajectory of the economy. The primary focus of this analysis is current market conditions. The analysis also considers market conditions five years in the future. Bakersfield is a growing region, and if the economy slows or contracts, the five-year projects may take somewhat longer to materialize. However, there is unlikely to be a wholesale change in the direction of the projections for continued growth.

In its second quarter 2025 report on national retail trends, commercial brokerage CBRE Research noted that, nationally, the retail market was moderating as retailers continue strategic rightsizing, despite continued strong demand for well-located, high-traffic centers. For Bakersfield, they noted that the retail availability rate was 5.9 percent, somewhat higher than the rate nationally, which was 4.9 percent.

Nevertheless, the region's continued growth in jobs and households will keep Bakersfield attractive to national retail chains and support existing and new local independent businesses.

2. Retail Trade Areas

A trade area is the geographic area from which a retail center will draw the majority of its customers. Several factors affect the size and boundaries of the trade area, including the type of shopping center, location of competitive retail facilities, physical barriers, and visibility and access to major roads and highways. The radial definition of a trade area based on its scale (see the

discussion of retail markets on 3) provides the starting point for defining a trade area. As the Urban Land Institute (ULI) cautions, however, “A trade area does not lend itself to concentric circles around a potential site.”¹

Different stores within a single retail center can have different trade areas. Indeed, the ability of anchor tenants to draw customers from a large trade area creates a valuable location for other retail tenants that typically draw from smaller trade areas. Market analyses conducted for specific retailers often sub-categorize the trade area into primary, secondary, and tertiary trade areas, using lifestyle segmentation to provide a greater understanding of exactly where potential customers reside, to quantify how much of their spending a new store can likely capture, and to determine effective ways to communicate with these customers.

For the present level of analysis, however, we use a single aggregate trade area definition because we are analyzing total market demand for retail space, not demand for one particular tenant or one type of good or service. Furthermore, at the entitlement stage, a developer will have few, if any, committed tenants. A market analysis using a tiered trade area defined for a particular tenant would shortchange the public interest in total market demand and preventing urban decay.

2A. Competitive Facilities

Because the proposed project qualifies as a community-scale shopping center, competitive facilities or districts are the community- and regional-scale shopping centers and areas with overlapping trade areas. The analysis identified the following competitive facilities, which are show in Figure 2.

Community-Scale Shopping Centers/Areas, 3-Mile-Radius Trade Area

- Bakersfield Plaza, California Ave. at the 99 Freeway
- Costco, Rosedale Hwy. at the 99 Freeway, Bakersfield
- Costco, Stine Rd. and Panama Lane, Bakersfield
- East Hills Commercial Area, Bernard St., Bakersfield
- Ming and Stine Commercial Area, Ming Ave. and Stine Rd., Bakersfield
- The MarketPlace, Ming Ave., Bakersfield
- The Shops at River Walk, Stockdale Hwy., Bakersfield
- Walmart, Paso Robles Hwy, and Central Ave., Wasco
- Walmart, Tucker Rd., Tehachapi
- Walmart/Home Depot, Woolloms Ave., Delano

¹ Michael D. Beyard et al., *Shopping Center Development Handbook*, 3rd ed. (Washington D.C.: Urban Land Institute, 1999), 46.

Community-Scale Shopping Centers/Areas, 5-Mile-Radius Trade Area

- Gosford Village Shopping Center, Gosford and Harris Roads, Bakersfield
- Northwest Promenade, Rosedale Hwy. and Coffee Ave., Bakersfield (across the street from the proposed project)

Regional-Scale Shopping Centers/Areas, 12-Mile-Radius Trade Area

- Downtown Bakersfield (for simplicity, defined as the intersection of Chester and Truxtun Avenues)
- Valley Plaza Mall, Ming Ave. at the 99 Freeway, Bakersfield

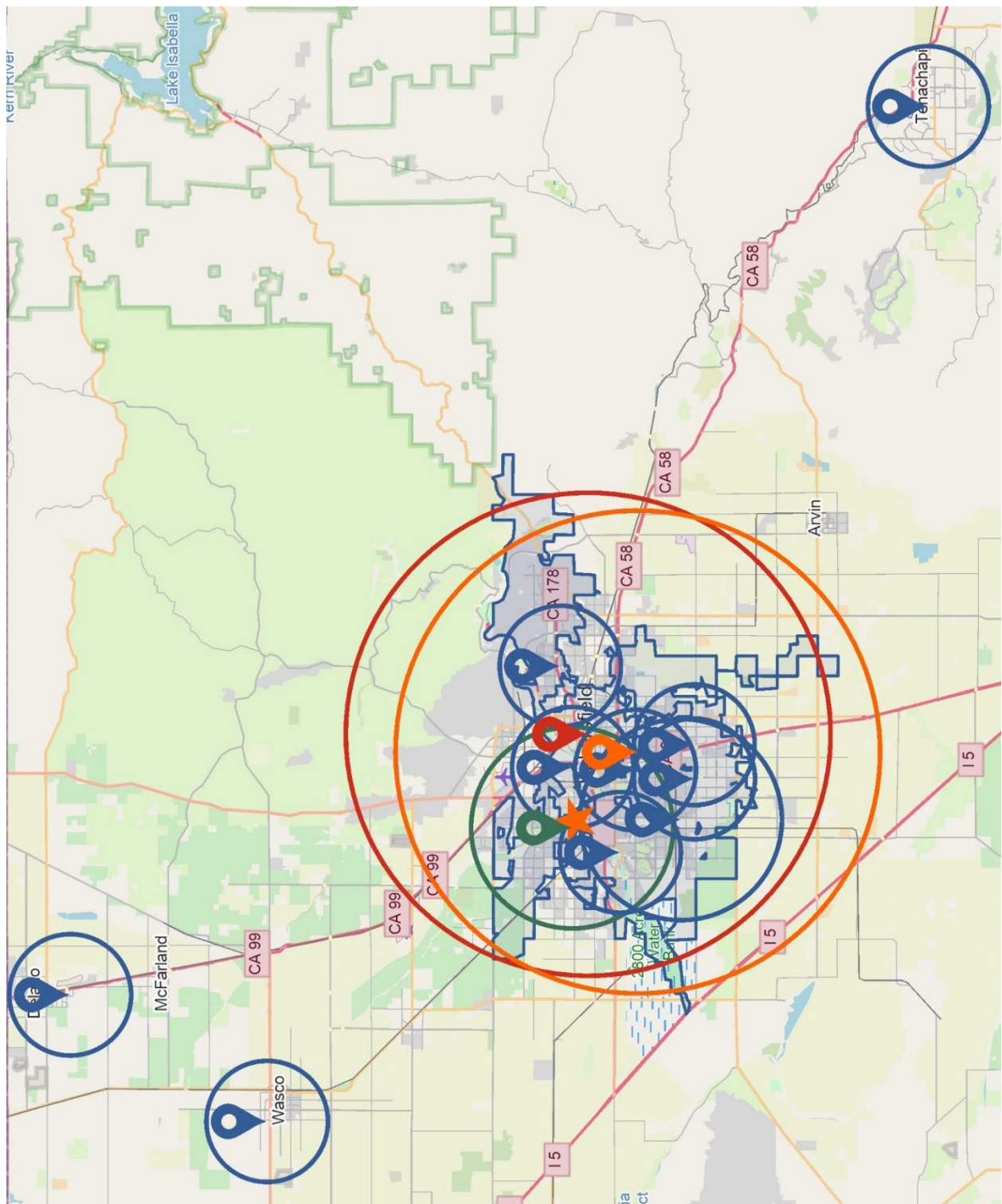
The classification of each shopping center or area reflects the size of the center or area and the types of stores.

The basic radial definition of trade areas leaves large rural expanses underserved by retail businesses. In reality, though, one of the aspects of rural living is driving much longer distance to purchase needed goods and services. Even though the residents in Delano, Tehachapi, and Wasco have a nearby Walmart, it is likely those residents regularly travel to Bakersfield to shop. The next section discusses how the trade areas are adjusted for the analysis to account for some of this rural patronage.

The analysis does not directly assess the impact of the proposed project on every individual shopping center in Bakersfield. There are many convenience-scale shopping centers and many grocery store-anchored shopping centers. However, most of the businesses in these centers do not compete directly with most of the businesses in the community- and regional-scale centers listed above. Even though individual trade areas are not defined and analyzed for each of these, the retail sales at these locations are accounted for.

To assess the potential for urban decay impacts, the analysis compares the proposed project (along with the adjacent Northwest Promenade) to the similar-scale retail centers: Gosford Village Shopping Center, Downtown Bakersfield, and Valley Plaza Mall. Even though the analysis only defines a trade area for each of these, the trade area, and consequently the analysis of the potential for urban decay, includes all the shopping center and retail businesses in each of the defined trade areas.

Figure 2: Competitive Shopping Centers/Areas and Their Basic Trade Area



Source: PlaceWorks, 2023.

2B. Proposed Project Trade Area

The proposed project alone would qualify as a community-scale shopping center. However, it should be viewed as part of the larger retail destination with the adjacent Northwest Promenade. This destination will have the size to qualify as a regional-scale shopping center, and it will likely develop a variety of retailers commensurate with a regional destination. Therefore, the analysis extends the defined trade area out eight miles to the north and to the west, which also reflects rural residents who will likely drive a longer distance.

The defined trade area is truncated to the south along Stockdale Hwy. and Westside Parkway. This reflects the competition from Gosford Village and the other community-scale shopping centers south of the Kern River. It also reflects that natural and man-made barriers often influence where people are willing to drive to go shopping.

The trade area is also truncated to the east at the Kern River, the 99 Freeway, Airport Road, and Granite Road. Again, this reflects competition from Downtown Bakersfield and Valley Plaza Mall as well as the physical barriers of the river and major roads. Figure 3 shows the trade area defined for the proposed project. As defined, it encompasses almost 97 square miles.

2C. Gosford Village Trade Area

The trade area defined for Gosford Village is similarly extended out to eight miles to the west and south. This reflects both the lack of competitive facilities in those directions as well as the diversity of retail with the Gosford Village Trade Area. Both The Shops at River Walk and the MarketPlace have a variety of apparel stores that approaches what one might find at a conventional regional shopping mall. As well, there are cinemas at the MarketPlace and Bakersfield Plaza.

This trade area is truncated to the east at the 99 Freeway, reflecting the physical boundary of the freeway and the competition at Valley Plaza Mall and Downtown Bakersfield. The trade area is also truncated to the north at the southern boundary of the trade area for the proposed project. Figure 4 shows the defined trade area boundary for Gosford Village. It includes over 122 square miles.

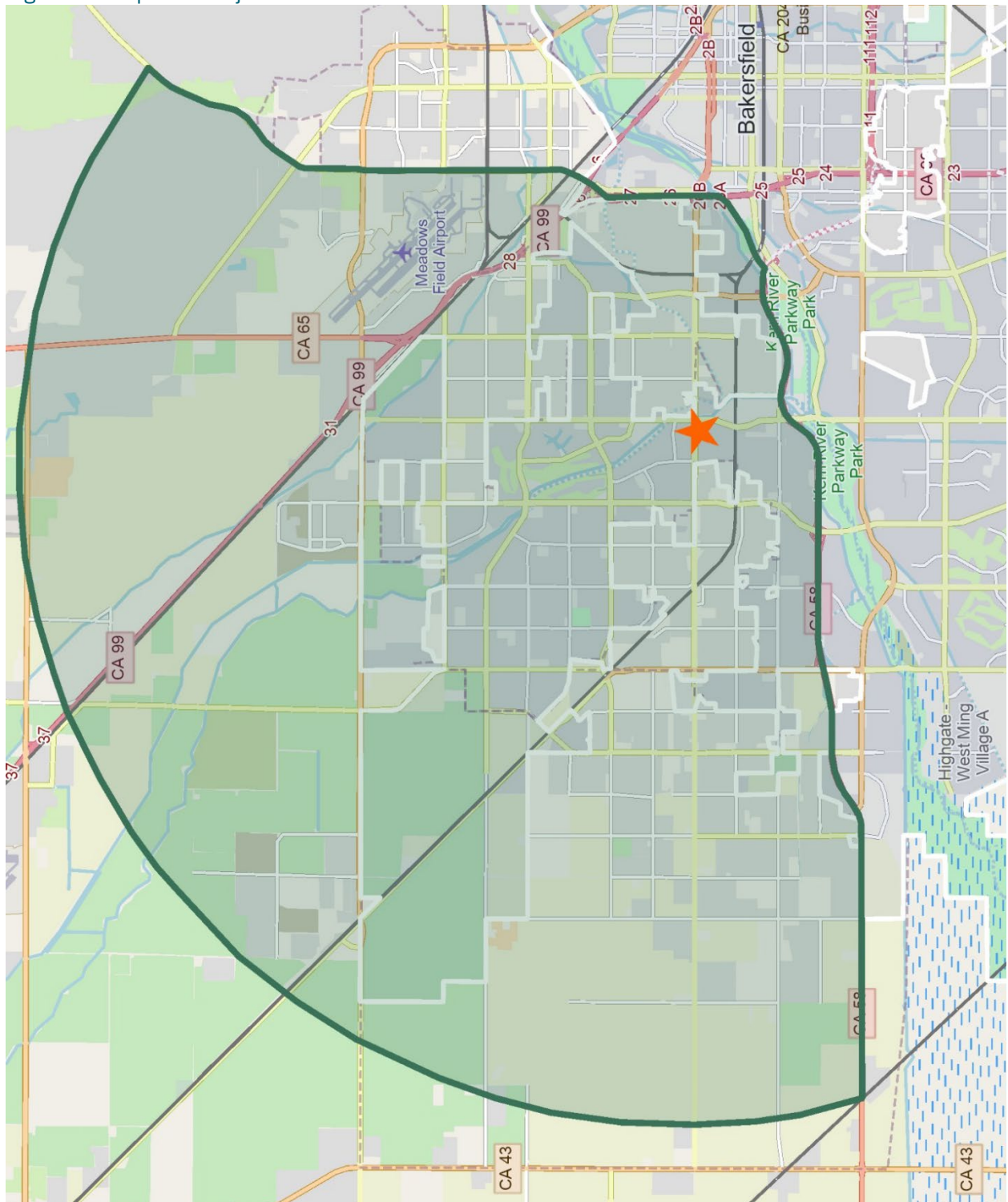
2D. Downtown and Valley Plaza Mall Trade Area

Downtown may not have the square footage of retail businesses nor the full variety of retail store types that characterize regional scale retail destinations. However, it is a regional destination for a great many non-retail businesses, and those patronizing these other types of business are likely to spend some time and money while in Downtown. In contrast, Valley Plaza Mall is the

quintessential regional shopping destination. Thus, they should both be analyzed with a 12-mile regional-scale trade area.

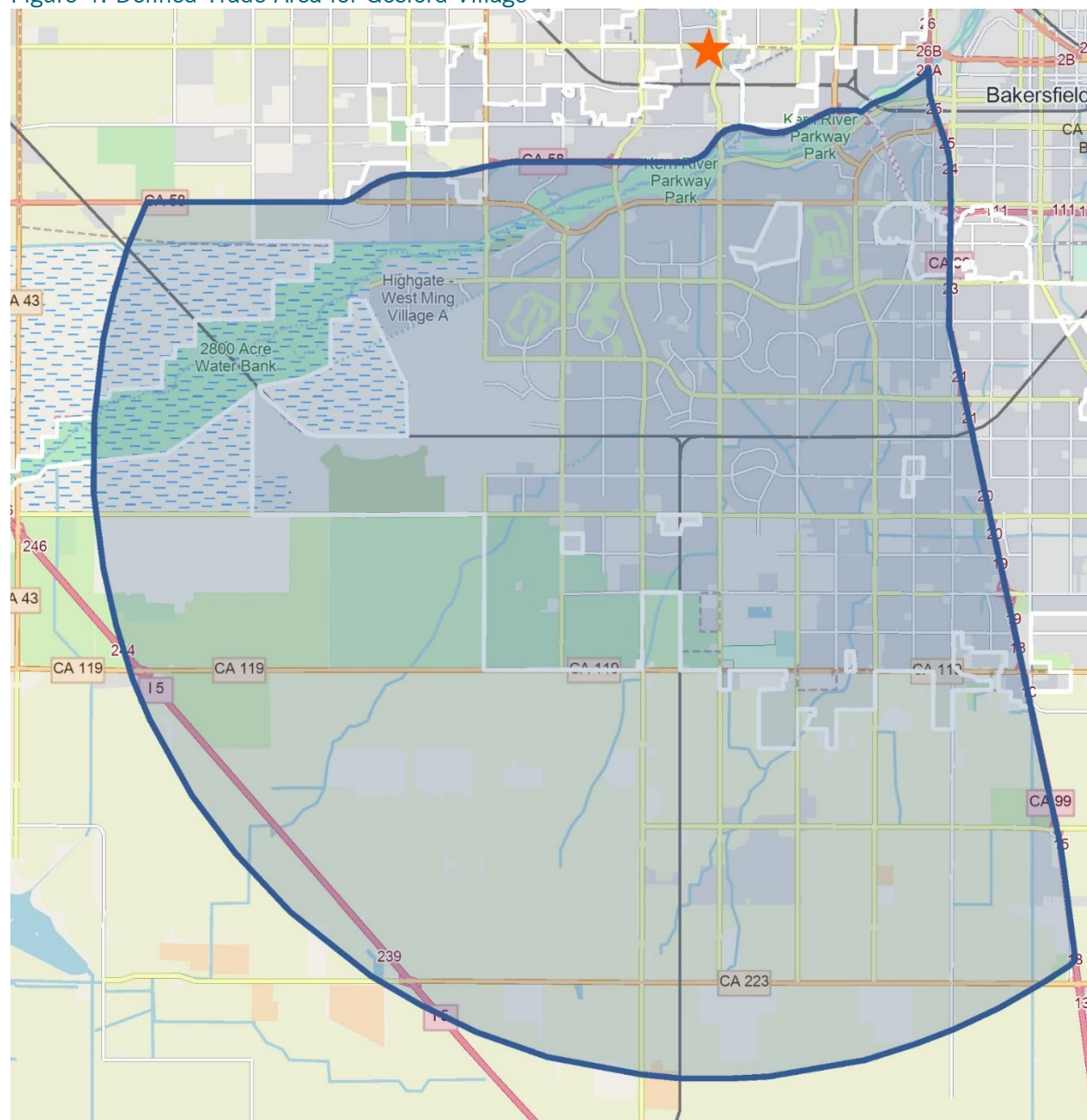
Due to the proximity of Downtown and Valley Plaza Mall, their trade areas nearly overlap. And where they do not overlap, the area is rural, with probably similar numbers of households and similarly few if any retail businesses. Thus, the analysis uses a single-trade area to assess potential urban decay impacts. Figure 5 shows this regional trade area boundary. It encompasses over 450 square miles.

Figure 3: Proposed Project Trade Area



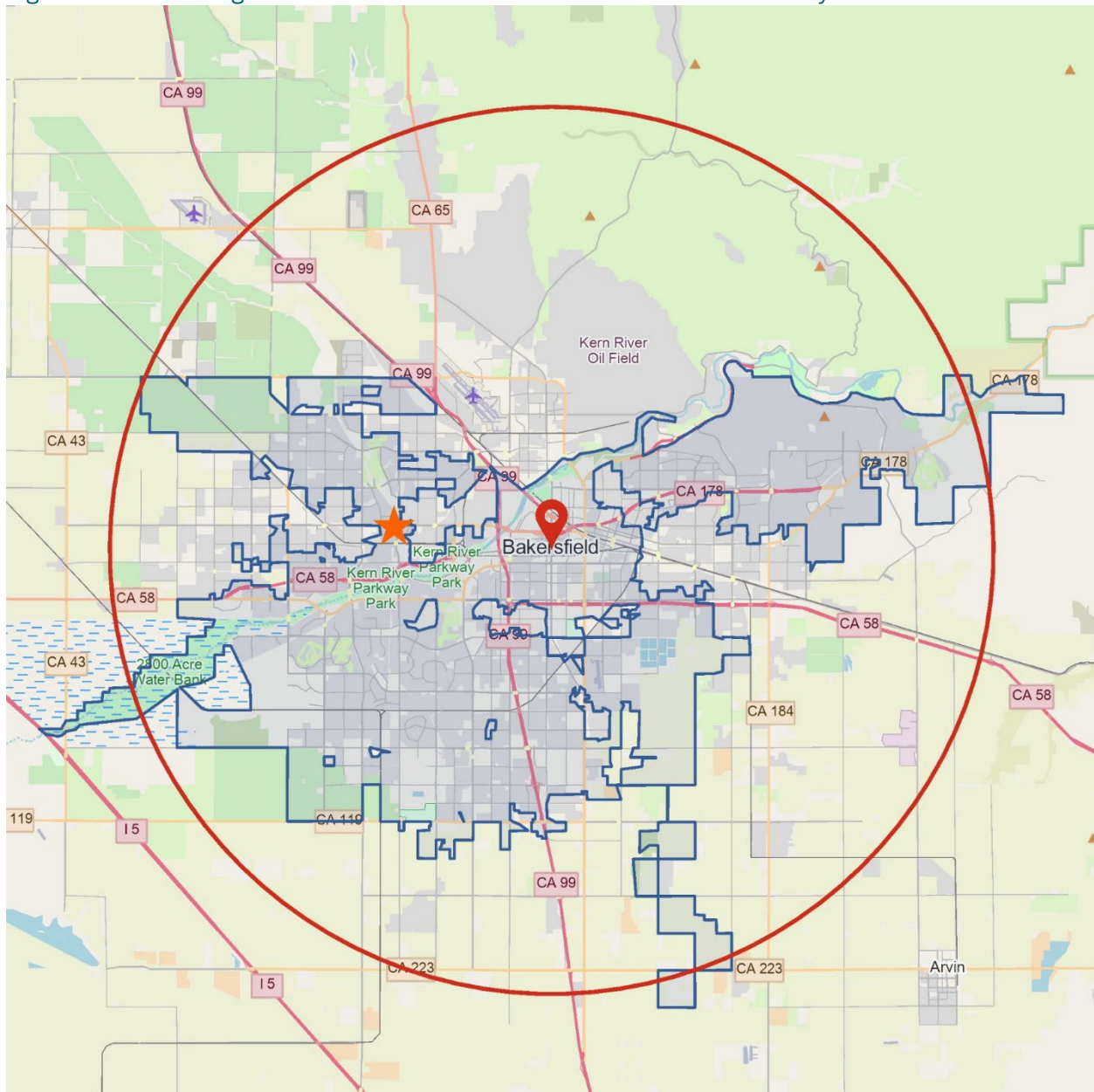
Source: PlaceWorks, 2023

Figure 4: Defined Trade Area for Gosford Village



Source: PlaceWorks, 2023.

Figure 5: Defined Regional Trade Area for Downtown Bakersfield and Valley Plaza Mall



Source: PlaceWorks, 2023.

3. Current Retail Market Demand

3A. Market Demand Generally

Retail market demand is the amount of new retail building space that spending by trade area households can support. To determine demand, we use the opportunity gap/surplus. This is the difference between the amount of money that trade area households spend at each type of retail store and the amount of sales at those types of stores in the trade area. When the difference is

positive, it means that trade-area residents are spending more than stores are selling; thus, residents are shopping at stores outside of the trade area. This is considered to mean that there is an opportunity for existing stores to attract more customers or for new retail businesses to open. However, when the difference is negative, it means that stores are attracting customers from outside of the trade area; thus, new stores would have to siphon spending away from existing stores or else attract new customers from farther away.

3A(i) Consumer Spending

We analyze spending at the household level because the household is the basic consumer unit. Each year, the US Bureau of Labor Statistics (BLS) conducts and publishes the Consumer Expenditure Survey (CES), the primary data source for spending analyses. BLS reports the data, categorized by type of product or service.

The analysis uses spending data from Claritas, Inc., the leading national provider of marketing data. Claritas starts with the basic CES data and adjusts it to reflect the particular demographics—such as household size and income—of the defined trade area. Claritas then reports the data, categorized by store type. The Claritas report also separates out telephone and internet expenditures from purchases at bricks-and-mortar stores. The underlying consumer spending data are provided in the Appendix in Table A-1, Table A-2, and Table A-3.

3A(ii) Average Sales Efficiency

Sales efficiency is the amount of sales generated per square foot of store floor area. The analysis uses data from the Urban Land Institute (ULI) and the International Council of Shopping Centers (ICSC), as well as data from retail corporations' SEC filings and industry standards to estimate average sales efficiency. The sales efficiency data are adjusted for regional factors based on the most recent Economic Census.

With the MSA adjustment, the regional average sales efficiency across all retail store types is \$362.13 per square foot. Older retail centers and stand-alone stores in the trade area probably capture a lower level of sales. New centers and the proposed project will likely capture a higher level of sales. In our calculations, however, we use the average sales efficiency to determine the total amount of retail building space, both old and new, that consumer spending can support.

3A(iii) How It Works

Simply dividing the trade area's opportunity gap or surplus at each store type (as reported by Claritas) by the average sales efficiency determines the supportable square footage. Summing the results for all store types determines the market potential, or the total supportable retail building space.

3B. Existing Opportunity Gap/Surplus

The data Table A-1, Table A-2, and Table A-3 provide the estimated opportunity gap or surplus for each type of store each trade area. However, for community-scale shopping centers, it is not likely that they will capture 100 percent of trade-area residents' consumer spending. Table A-4 provides assumptions for the percentage of local consumer spending that the proposed project and the Gosford Village trade areas might expect to capture. These range from 50 percent for clothing stores to 90 percent for convenience goods, such as grocery stores. For the regional trade area, which extends beyond the city boundaries, it is reasonable to assume a full capture of trade area consumer spending.

Table 2 summarizes the estimated opportunity gap (positive data) or surplus (negative data) that could be available to support additional retail development in each of the three trade areas. Although each trade area has surplus for several retail store types, the bottom line is that there is a substantial amount of leaked spending in each trade area.

Table 2: Opportunity Gap/(Surplus) in Current Dollars by Store Type; Proposed Project Trade Area and Comparison Trade Areas; 2025 Estimate

	Proposed Project Trade Area	Gosford Village Trade Area	Regional Downtown Trade Area
<i>Convenience Goods and Services</i>			
Food & Beverage Stores	125,800,000	128,700,000	207,000,000
Health & Personal Care Stores	39,000,000	49,700,000	32,000,000
Gasoline Stations	14,100,000	1,330,000	(327,000,000)
Miscellaneous Store Retailers	12,730,000	54,100,000	57,700,000
Subtotal	192,000,000	234,000,000	(29,800,000)
<i>Comparison Goods and Services</i>			
Furniture & Home Furnishings Stores	6,880,000	22,200,000	62,000,000
Electronics & Appliance Stores	7,320,000	14,290,000	55,900,000
Bldg Materials, Garden Equip. & Supply	(13,440,000)	31,600,000	114,900,000
Clothing & Clothing Accessories Stores	2,890,000	(2,616,000)	104,500,000
Sporting Goods, Hobby, Book & Music Stores	10,770,000	14,700,000	70,400,000
General Merchandise Stores	(13,640,000)	(4,560,000)	30,300,000
Subtotal	800,000	75,600,000	438,000,000

Table 2 continued

	Proposed Project Trade Area	Gosford Village Trade Area	Regional Downtown Trade Area
Food and Drink			
Drinking Places - Alcoholic Beverages	1,585,000	6,280,000	18,700,000
Full-service restaurants	(4,007,000)	13,750,000	211,000,000
Limited-service restaurants	(6,177,000)	(51,600,000)	(93,600,000)
Subtotal	(8,600,000)	(31,560,000)	135,500,000
Total	184,000,000	278,000,000	544,000,000

Source: PlaceWorks, 2025, using data from Claritas, the US Census Bureau Economic Census, 2017, and the US Bureau of Labor Statistics Consumer Price Index and Producer Price Index.

3C. Current Market Demand

The current market demand is derived by dividing the opportunity gap or surplus for each store type by the average sales efficiency for that type of store. Table 3 provides the estimated market demand for retail building space that could be supported by existing levels of consumer spending by residents in each of the trade areas.

The analysis indicates that the proposed project's trade area could accommodate up to 491,000 sq. ft. of additional retail building space supported by retail spending that currently leaks out of the trade area. Similarly, the trade area that encompasses Gosford Village and the other community-scale shopping centers south of the Kern River could accommodate another 864,000 square feet of retail building space, separate from the spending in the proposed project's trade area.

Finally, the analysis indicates that the regional trade area, which encompasses the proposed project trade area and the Gosford Village trade area, can accommodate 2.65 million square feet of retail building space, inclusive of the supportable space in the two trade areas. That works out to a net demand in the regional trade area of nearly 1.3 million square feet when excluding the trade areas for the proposed project and Gosford Village.

Table 3: Current Market Demand for Retail Development in Gross Building Square Footage; Proposed Project Trade Area and Comparison Trade Areas; 2025 Estimate

	Proposed Project Trade Area	Gosford Village Trade Area	Regional Downtown Trade Area
Convenience Goods and Services			
Food & Beverage Stores	329,000	315,000	532,000
Health & Personal Care Stores	81,700	104,100	67,100
Gasoline Stations	8,510	800	(197,100)
Miscellaneous Store Retailers	83,300	264,000	384,000
Subtotal	502,000	683,000	786,000
Comparison Goods and Services			
Furniture & Home Furnishings Stores	22,000	93,500	235,200
Electronics & Appliance Stores	22,500	43,900	172,000
Bldg Materials, Garden Equip. & Supply	(36,100)	78,200	287,000
Clothing & Clothing Accessories Stores	6,220	(18,590)	375,000
Sporting Goods, Hobby, Book & Music Stores	36,500	49,200	236,000
General Merchandise Stores	(49,600)	(21,700)	174,000
Subtotal	1,500	225,000	1,480,000
Food and Drink			
Drinking Places - Alcoholic Beverages	10,450	41,400	122,900
Full-service restaurants	(9,030)	31,000	474,000
Limited-service restaurants	(13,920)	(116,200)	(211,000)
Subtotal	(12,490)	(43,850)	386,000
Total	491,000	864,000	2,650,000

Source: PlaceWorks, 2025, using data from Claritas, The Urban Land Institute, the International Council of Shopping Centers, and the US Census Bureau Economic Census 2017 and the US Bureau of Labor Statistics Consumer Price Index and Producer Price Index.

4. Expected Growth

Bakersfield and Kern County are relatively fast growing: over the ten years from 2012 to 2022, the city's population increased at an annual rate of 1.4 percent per year and the county's by 0.6 percent per year, significantly higher than the statewide growth rate of 0.3 percent per year. In an era in which the retail sector continues to transform in response to the pandemic and the resulting economic and employment shifts, retail businesses are cautious about opening new stores. However, there is less perceived risk in opening new stores in areas that are growing and adding households.

4A. Trade Area Population and Households

Similar to citywide growth, each of the three trade areas have experienced residential growth over the past ten years and are projected to continue growing. Detailed data for the socioeconomic characteristics are provided in the Appendix, in Table A-5 for the proposed project's trade area, Table A-6 for the Gosford Village / River Walk trade area, and Table A-7 for the Downtown / Valley Plaza Mall regional trade area. Table 4 provides data for population and the number of households for each trade area, including the portion of the Downtown / Valley Plaza Mall regional trade area that excludes the trade areas for the proposed project and Gosford Village / River Walk.

Table 4: Population and Number of Households; Proposed Project Trade Area and Comparison Trade Areas; 2010 and 2020, 2025 Estimate, and 2030 Projection

	Trade Area			
	Proposed Project	Gosford Village/ River Walk	Downtown / Valley Plaza Mall	Downtown less Proposed Project and Gosford Village
Population				
2010	90,200	148,700	534,000	295,000
2020	103,200	180,500	601,000	317,000
10-Year Change	12,990	31,800	66,900	22,100
Annual Rate of Change	1.4%	2.0%	1.2%	0.7%
2025 Estimate	107,400	192,000	618,000	319,000
2030 Projection	108,400	194,400	627,000	324,000
Projected 5-Year Change	1,060	2,420	8,630	5,160
Projected Annual Rate of Change	0.1%	0.1%	0.1%	0.2%
Number of Households				
2010	30,100	49,400	166,900	87,400
2020	34,000	58,500	187,800	95,300
10-Year Change	3,890	9,020	20,900	7,980
Annual Rate of Change	1.2%	1.7%	1.2%	0.9%
2025 Estimate	36,000	62,900	197,100	98,200
2030 Projection	36,700	64,300	202,000	101,100
Projected 5-Year Change	730	1,430	4,990	2,830
Projected Annual Rate of Change	0.2%	0.2%	0.3%	0.3%

Source: PlaceWorks, 2025, using data, estimates, and projections from Esri Business Analyst.

Each of the trade areas experienced growth in population and the number of households from 2010 to 2020. Each of the trade areas is projected to

continue growing over the next five years, although the rate of growth is projected to slow relative to the rate over the past ten years.

Over the past ten years, the rate of growth in the proposed project's trade area was less than that in the trade area for Gosford Village / River Walk but more than that in the regional trade area for Downtown and Valley Plaza Mall. For the regional trade area, most of the growth over the past ten years occurred in the two other trade areas. However, even when excluding the population and number of households in the first two trade areas, the remainder of the regional trade area's population grew at a rate of 0.7 percent per year, which was higher than the countywide and statewide population growth rates.

Over the next five years, growth in population and number of households in the proposed project's trade area is projected to be much lower than the rates over the past ten years. The proposed project's population and household growth is also projected to be slower than the rate of growth in the Gosford Village / River Walk trade area, the regional trade area, and the regional trade area excluding the other two trade areas.

4B. Household Income

The trade area for the proposed project has the highest average annual household income among the trade areas analyzed for this report. The lowest household income is in the regional trade area for Downtown and Valley Plaza Mall when the other two trade areas are removed. Table 5 provides the average household income data for each of the trade areas.

Table 5: Average Annual Household Income; Proposed Project Trade Area and Comparison Trade Areas; 2025 Estimate and 2030 Projection

	Trade Area			
	Proposed Project	Gosford Village/ River Walk	Downtown / Valley Plaza Mall	Downtown less Proposed Project and Gosford Village
2025 Estimate	135,900	119,800	100,300	74,700
2030 Projection	148,900	131,900	110,300	82,500
5-Year Change	13,010	12,140	10,030	7,780
Total Percentage Change	9.6%	10.1%	10.0%	10.4%

Source: PlaceWorks, 2025, using data, estimates, and projections from Esri Business Analyst.

Over the next five years, the proposed project's trade area is projected to have the largest dollar increase in income, but, because the area has a higher income currently, the 5-year percentage increase, 9.6 percent, is lower than the household income in the other trade areas.

4C. Market Demand Growth

The growth in households over the next five years will result in new consumer spending in each trade area and, thus, result in an increase in market demand for retail building space. The growth in market demand is based on the supportable square footage per household currently and the projected increase in households. Table 6 provides the projected growth in market demand for each of the trade areas.

Table 6 Five-year Increase in Market Demand for Retail Development in Gross Building Square Footage; Proposed Project Trade Area and Comparison Trade Areas; 2025 to 2030

	Trade Area			
	Proposed Project	Gosford Village/ River Walk	Downtown / Valley Plaza Mall	Downtown less Proposed Project and Gosford Village
Convenience Goods and Services				
Food & Beverage Stores	13,250	23,000	72,500	41,100
Health & Personal Care Stores	4,420	7,600	23,760	13,470
Gasoline Stations	1,780	3,070	9,650	5,480
Miscellaneous Store Retailers	7,140	12,280	38,400	21,800
Subtotal	26,580	46,000	144,300	81,900
Comparison Goods and Services				
Furniture & Home Furnishings	2,740	4,780	15,010	8,510
Electronics & Appliance Stores	1,470	2,530	7,950	4,510
Bldg Materials, Garden Equip...	5,570	9,400	29,200	16,540
Clothing & Clothing Accessories	3,780	6,580	20,670	11,720
Sporting Goods, Hobby, Book...	1,640	2,850	8,910	5,050
General Merchandise Stores	12,760	22,100	69,500	39,400
Subtotal	27,960	48,300	151,200	85,700
Food and Drink				
Drinking Places – Alcohol...	290	1,250	2,770	1,400
Full-service restaurants	940	4,010	8,810	4,460
Limited-service restaurants	1,470	6,260	13,720	6,940
Subtotal	2,700	11,510	25,300	12,790
Total	57,200	105,800	321,000	180,400

Source: PlaceWorks, 2025, using data from Claritas, Esri Business Analyst, The Urban Land Institute, the International Council of Shopping Centers, the US Census Bureau Economic Census 2017, and US Bureau of Labor Statistics Consumer Price Index and Producer Price Index.

With the expected household growth over the next five years, the trade area for the proposed project will likely have the least growth in market demand, 57,200 square feet. The regional trade area defined for downtown and Valley Plaza Mall is projected to have the largest five-year increase in market demand, 180,400 when excluding the trade areas for the proposed project and Gosford Village.

4D. Pipeline Projects

Pipeline projects are retail developments that have been entitled and are or will be under construction soon. The intent is to understand how much retail square footage will be operational and competing for consumer spending in 2030.

There are several challenges in the present case. First, there are many sites planned and zoned for retail development in the Bakersfield metropolitan area, but plans for development have not progressed or were put on hold with the economic disruptions resulting from the COVID-19 pandemic. Second, retailers are evolving how they operate, employing what is called omni-channel retailing, which includes online sales with shipping, same-day deliveries, in-store or curbside pickup, and traditional in-store shopping and checkout. For many retailers, investments in omni-channel retailing have taken the place of most investments in new stores. Finally, the rapid increase in inflation and the increase in interest rates intended to slow inflation have fundamentally changed the calculus that went into physical and financial planning for retail development that occurred even just a year or two ago.

The following descriptions summarize the major pipeline projects that are competitive with the proposed project.

4D(i) Proposed Project Trade Area

Bakersfield Commons

Originally approved in the early 2000s, this 200-acre project was expected to include 800 apartments, a 250-room hospital and medical offices, a 300,000-square foot retail center, and industrial office space. This project has been through several iterations of vision and conceptualization. Currently a portion of the site is under development with new warehouse construction. The original market study included this site in the inventory of pipeline projects. However, It is not clear that the retail building space is on track to be built and operational in the next five years. Thus the project is not currently accounted for as a pipeline retail development in this analysis.

4D(ii) Gosford Village Trade Area

West Ming Specific Plan

The West Ming Specific Plan is located within the Gosford Village trade area and the regional trade area for Downtown and Valley Plaza Mall. The specific plan area includes some existing retail development (which is included in the estimate of current retail market demand in Section 3), available but unbuilt pad sites, and undeveloped areas that will be built out over time as additional plan area housing is developed. This analysis assumes that there is the potential for an additional 51,400 square feet of retail building space to become operational over the next five years.

Coffee and Rosedale Commercial Retail Development Project is unlikely to compete directly with the retail businesses in the West Ming Specific Plan area.

The Ranch at Stockdale River Ranch

The Ranch is an entitled shopping center (September 2021 site plan approval) for 145,300 square feet of retail building space. The project is located in the defined trade area for Gosford Village but is located in proximity to the boundary with the trade area for the proposed project (i.e., along Stockdale Highway). For the purpose of assessing potential urban decay impacts, the analysis allocates half of the Ranch retail square footage to the proposed project's trade area and half to the trade area for Gosford Village, because retail businesses at the Ranch will draw customers from both trade areas.

Crossroads Plaza Commercial Center

The Crossroads Plaza Commercial Center is planned for the area northwest of the intersection of Gosford Road and Panama Lane. It is south of the existing Gosford Village Shopping Center. The project EIR was certified by the City in 2010 and included 786,370 square feet of retail building space. The southern half of the site received site plan approval from the City in 2024 for the first phase, which will provide 312,030 square feet of retail building space.

4D(iii) Regional Trade Area for Downtown and Valley Plaza Mall

The Crossings and Bakersfield Gateway Center

The Bakersfield Gateway Center, originally proposed with up to 800,000 square feet of retail building space, is expected to develop with about 200,000 square feet of retail. The Crossings is proposed to provide 284,800 square feet of retail building space.

It is not clear that all the retail development in these two proposed projects will be developed and operational in the next five years. Nevertheless, the scale of retail development represent a community-scale commercial center

that would be on par with the proposed project, and, therefore, the analysis includes the full development potential of 484,800 square feet.

These two development sites are located within the defined regional trade area for Downtown and Valley Plaza Mall but in proximity to the defined boundary of the Gosford Village trade area (i.e., the 99 freeway) and would draw customers from that trade area. The analysis allocates half of this pipeline supply to the Gosford Village trade area. It also allocates half to the estimate of market demand for the regional trade area excluding the Gosford Village and the proposed project trade areas. Finally, for the overall regional trade area, the full 484,800 square feet is taken into consideration.

City Lights / East Hills Mall Redevelopment

This proposed project would redevelop the former East Hills Mall site with a new 339,393-square foot shopping center. Taken with the other retail development adjacent to and near the site, this area would qualify as a regional-scale retail area.

4E. Five-Year Pipeline Supply of New Retail Building Space

Reflecting the discussion of each major project in the preceding section, Table 7 summarizes the five-year pipeline supply of new competitive retail building space that can be reasonable assumed for each trade area used in the analysis. For the trade area defined for the proposed project, there are no competitive pipeline projects expected to become operational in the next five years. There could be an additional 1.2 million square feet of new retail in the Gosford Village/River Walk trade area, and 582,000 square feet of new retail in the regional trade area defined for downtown and Valley Plaza Mall excluding the trade areas defined for the proposed project and Gosford Village.

Table 7: Five-Year Pipeline Supply of New Retail Development (GFA, sq. ft.) by Trade Area, 2025 to 2030

Proposed Shopping Center	Trade Area			
	Proposed Project	Gosford Village/River Walk	Downtown / Valley Plaza Mall	Downtown less Proposed Project and Gosford Village
West Ming Specific Plan		51,400	51,400	
The Ranch at Stockdale River Ranch	72,700	72,700	145,300	
Crossroads Plaza Commercial Center		786,000	786,000	
Bakersfield Gateway Center		242,000	484,000	242,000
City Lights/East Hills Mall			339,000	339,000
Trade Area Total	73,000	1,153,000	1,807,000	582,000

Source: PlaceWorks, 2025.

5. Urban Decay Findings

Based on the foregoing analyses, Table 8 estimates, for each defined trade area, the existing unmet market demand for retail building space after development of the proposed project and the market demand for retail building space in 2030 after development of the proposed project and the pipeline supply.

Table 8: Estimated Retail Market Demand (GFA, sq. ft.) Before and After Proposed Project and Pipeline Supply by Trade Area; Existing 2025 and Projected 2030

	Trade Area			
	Proposed Project	Gosford Village/ River Walk	Downtown / Valley Plaza Mall	Downtown less Proposed Project and Gosford Village
Existing Unmet Market Demand	491,000	864,000	2,650,000	1,295,000
Proposed Project	316,000		316,000	
Existing Residual Market Demand	175,000	864,000	2,330,000	1,295,000
5-Year Market Potential	57,200	105,800	321,000	180,400
Total 5-Year Market Demand	232,000	970,000	2,650,000	1,480,000
Pipeline Projects	73,000	1,153,000	1,807,000	582,000
Residual 5-Year Market Demand	159,070	(183,000)	850,000	893,000

Source: PlaceWorks, 2025

Notes to Table 8:

1. The existing unmet market demand is the estimated amount of retail building space that could be supported by current spending by trade area households that is spent outside of the trade area, in square feet of gross floor area, as provided in Table 3.
2. The proposed project is square footage retail building space in the proposed project (only relevant for the trade area defined for the proposed project and the regional trade area defined for Downtown and Valley Plaza Mall) in square feet of gross floor area.
3. The existing residual market demand is the existing unmet market minus the proposed project, in square feet of gross floor area. This is a key metric in the determination of potential urban decay impacts.
4. The five-year market potential is the estimated additional amount of retail building space that could be supported by consumer spending by the projected five-year increase in households in each trade area, in square feet of gross floor area, as provided in Table 6.
5. Total five-year market demand is the existing residual market demand (estimated for 2025) plus the five-year market potential; estimated as the square feet of gross floor area in 2030.

6. Pipeline projects is the estimated amount of retail building space that the analysis assumes is likely to be developed and become operation by 2030, in square feet of gross floor area, as provided in Table 7.
7. The residual five-year market demand is the total five-year market demand less the pipeline projects and is the estimated amount of market demand for retail building space in 2030 after the development of the proposed project and the pipeline supply, in square feet of gross floor area.

5A. Existing Market Demand and the Proposed Project

Each of the defined trade areas currently has leaked retail spending (i.e., consumer spending by trade area households that occurs at businesses outside of the trade area), which could support additional retail development within the trade area. Even with development of the proposed project, the two directly affected trade areas would still have unmet retail development. The unmet demand would support another 175,00 square feet of retail building space in the trade area defined for the proposed project, and 1.3 million square feet in the regional trade area defined for Downtown and Valley Plaza Mall. The analysis assumes that Stockdale Hwy. and Westside Parkway creates a boundary where residents to the north would patronize retailers in proposed project's trade area and those to the south would patronize retailers in the Gosford Village / River Walk trade area. The later trade area currently has unmet market demand that is unlikely to be affected by the proposed project. That existing unmet market demand is estimated to be sufficient to support an additional 864,000 square feet of retail building space in that trade area.

5B. Projected Market Demand in 2030

5B(i) Proposed Project Trade Area

The Ranch at Stockdale River Ranch would be located in the Gosford Village / River Walk trade area, but the analysis assumes that it could generate half of its retail sales from residents in the proposed project's trade area. The analysis allocated half of the Ranch's sales to the proposed project's trade area. With this addition and the increase in consumer spending generated by the projected household growth, the analysis projects that this proposed project's trade area would have an unmet retail demand of 159,000 square feet of retail building space in 2030. This is less than the 220,000 square feet of retail building space once envisioned for Bakersfield Commons. If retail development is to move forward there, it might need to be less square footage or it might need to become operation after 2030, when continued household growth could support more retail development.

5B(ii) Gosford Village / River Walk Trade Area

Even though the Gosford Village / River Walk trade area has current unmet retail demand, the projected increase in retail spending from projected household growth would not be sufficient to support the potential commercial

development in this trade area if it were to all become operational by 2030. The analysis projects that the full buildout of planned projects would exceed market demand in 2030 by 183,000 square feet of retail building space. However, the analysis includes two pipeline projects that may not become operational by 2030: 484,400 square feet at the Crossings and Bakersfield Gateway Center, and 474,340 square feet at Crossroads Plaza Commercial Center (the portion that was part of the Certified EIR but has not yet gone through site plan review). Thus, the projected excess retail building space projected for this trade area would occur only if both of these two projects are developed and operational by 2030.

The proposed project represents an expansion of the existing retail development at Coffee Road and Rosedale Highway. The potential expansion at Crossroads Plaza Commercial Center is double the amount of retail in the proposed project. Thus, the proposed project would not alter the defined trade area boundary between the two trade areas, which boundary is represents the physical barriers of the Kern River and Stockdale Highway and Westside Parkway. The potential excess retail building space that could occur in the Gosford Village / River Walk trade area would exist with or without the proposed project.

5B(iii) Downtown / Valley Plaza Trade Area

The 12-mile-radius trade area for Downtown / Valley Plaza Mall is projected to have unmet market demand for retail building space in 2030 regardless if the consumer spending and retail square footage in the other two trade areas is included or excluded.

5C. Findings

The analysis indicates that the proposed project should not cause urban decay impacts because there would unmet market demand after developing the proposed project, currently and after five years. In the case of the Gosford Village / River Walk trade area, the projected excess of 183,000 square feet of retail building space in 2030 would be avoided if one of two potential projects does not become fully operational by 2030. Nevertheless, the proposed project would not affect the potential excess of retail building space in this trade area.

Based on these results, the analysis finds that development of the proposed project is not expected to exceed market demand and, thus, will not directly cause long-term vacancies in other competitive retail centers, leading to urban decay.

Appendix

The following tables provide the data used in the analysis.

Table A-1: Retail Stores Opportunity Gap/Surplus; Proposed Project Trade Area; 2025 Estimate

	2025 Demand (\$)	2025 Supply (\$)	Opportunity Gap/Surplus (\$)
Totals			
Total retail trade including food and drink	2,123,982,854	1,158,111,547	965,871,307
Total retail trade	1,893,744,638	996,634,606	897,110,032
Motor Vehicle and Parts Dealers			
Motor vehicle and parts dealers	428,560,742	260,978,393	167,582,350
Automobile dealers	356,299,798	186,160,561	170,139,237
New car dealers	318,253,194	166,161,720	152,091,474
Used car dealers	38,046,605	19,998,841	18,047,764
Other motor vehicle dealers	35,809,330	36,710,938	(901,608)
Recreational vehicle dealers	12,848,242	26,903,393	(14,055,152)
Motorcycle, boat, and other motor vehicle dealers	22,961,088	9,807,544	13,153,544
Boat dealers	8,163,291	2,019,053	6,144,238
Motorcycle, ATV, and all other motor vehicle dealers	14,797,797	7,788,491	7,009,306
Automotive parts, accessories, and tire stores	36,451,614	38,106,894	(1,655,280)
Automotive parts and accessories stores	22,986,148	23,607,929	(621,781)
Tire dealers	13,465,467	14,498,965	(1,033,499)
Furniture and Home Furnishings Stores			
Furniture and home furnishings stores	38,816,775	22,232,481	16,584,295
Furniture stores	22,020,043	15,732,759	6,287,284
Home furnishings stores	16,796,733	6,499,721	10,297,012
Floor covering stores	8,419,874	2,677,576	5,742,297
Other home furnishings stores	8,376,859	3,822,145	4,554,714
Window treatment stores	492,417	260,931	231,486
All other home furnishings stores	7,884,442	3,561,214	4,323,228
Electronics and Appliance Stores			
Electronics and appliance stores	29,824,074	15,049,044	14,775,030
Household appliance stores	6,288,961	4,697,732	1,591,229
Electronics stores	23,535,113	10,351,312	13,183,801
Bldg. Material & Garden Equipment and Supplies Dealers			
Building material and garden equipment and supplies dealers	134,687,388	114,459,979	20,227,409
Building material and supplies dealers	117,653,587	103,152,295	14,501,292
Home centers	66,533,456	63,273,755	3,259,702
Paint and wallpaper stores	3,907,052	3,182,011	725,040
Hardware stores	9,813,222	5,377,458	4,435,764
Other building material dealers	37,399,857	31,319,071	6,080,786
Lawn and garden equipment and supplies stores	17,033,802	11,307,684	5,726,118
Outdoor power equipment stores	3,448,839	707,688	2,741,151
Nursery, garden center, and farm supply stores	13,584,963	10,599,997	2,984,966
Food and Beverage Stores			
Food and beverage stores	271,939,576	118,909,087	153,030,489
Grocery stores	244,379,000	116,099,969	128,279,031

	2025 Demand (\$)	2025 Supply (\$)	Opportunity Gap/Surplus (\$)
Supermarkets and other grocery	234,128,303	111,107,056	123,021,247
Convenience stores	10,250,696	4,992,912	5,257,784
Specialty food stores	7,089,039	1,498,789	5,590,250
Meat markets	2,168,219	272,463	1,895,756
Fish and seafood markets	852,771	57,112	795,659
Fruit and vegetable markets	1,484,204	215,008	1,269,196
Other specialty food stores	2,583,846	954,206	1,629,639
All other specialty food stores	1,210,617	235,378	975,239
Beer, wine, and liquor stores	20,471,536	1,310,330	19,161,207
Health and Personal Care Stores			
Health and personal care stores	109,717,710	59,745,030	49,972,679
Pharmacies and drug stores	94,211,566	52,045,279	42,166,287
Cosmetics, beauty supplies, and perfume stores	6,524,549	3,740,082	2,784,467
Optical goods stores	3,034,881	1,382,894	1,651,988
Other health and personal care stores	5,946,712	2,576,777	3,369,935
Food	2,103,445	1,231,102	872,343
All other health and personal care stores	3,843,267	1,345,675	2,497,592
Gasoline Stations			
Gasoline stations	153,331,382	123,895,605	29,435,777
Clothing and Clothing Accessories Stores			
Clothing and clothing accessories stores	92,524,100	43,374,971	49,149,129
Clothing stores	63,280,693	29,267,594	34,013,099
Men's clothing stores	2,404,048	689,697	1,714,352
Women's clothing stores	12,267,605	4,014,103	8,253,502
Children's and infants' clothing stores	2,795,616	2,245,837	549,778
Family clothing stores	37,030,699	18,923,407	18,107,292
Clothing accessories stores	3,196,768	815,667	2,381,102
Other clothing stores	5,585,957	2,578,884	3,007,073
Shoe stores	10,756,159	7,802,050	2,954,109
Jewelry, luggage, and leather goods stores	18,487,249	6,305,327	12,181,921
Jewelry stores	11,954,941	3,593,355	8,361,587
Luggage and leather goods stores	6,532,307	2,711,972	3,820,335
Sporting Goods, Hobby, Musical Instrument, & Book Stores			
Sporting goods, hobby, musical instrument, and book stores	30,565,826	12,152,220	18,413,606
Sporting goods, hobby, and musical instrument stores	26,923,091	11,393,851	15,529,240
Sporting goods stores	17,789,999	5,539,852	12,250,147
Hobby, toy, and game stores	7,033,252	5,005,013	2,028,239
Sewing, needlework, and piece goods stores	909,348	366,484	542,865
Musical instrument and supplies stores	1,190,492	482,504	707,988
Book stores and news dealers	3,642,735	758,369	2,884,367
Book stores	3,388,224	758,369	2,629,855
News dealers and newsstands	254,511	0	254,511

	2025 Demand (\$)	2025 Supply (\$)	Opportunity Gap/Surplus (\$)
General Merchandise Stores			0
General merchandise stores	240,029,603	185,618,288	54,411,315
Department stores	32,167,380	18,725,450	13,441,930
Other general merchandise stores	207,862,223	166,892,838	40,969,385
Warehouse clubs and supercenters	188,453,627	151,052,817	37,400,810
All other general merchandise stores	19,408,596	15,840,021	3,568,575
Miscellaneous Store Retailers			
Miscellaneous store retailers	39,165,476	17,218,566	21,946,910
Florists	1,860,501	938,360	922,141
Office supplies, stationery, and gift stores	7,357,004	2,953,063	4,403,941
Office supplies and stationery stores	3,132,352	1,892,588	1,239,765
Gift, novelty, and souvenir stores	4,224,652	1,060,476	3,164,177
Used merchandise stores	5,756,487	2,468,207	3,288,280
Other miscellaneous store retailers	24,191,483	10,858,936	13,332,547
Pet and pet supplies stores	7,714,544	3,720,717	3,993,827
Art dealers	3,561,311	620,832	2,940,479
Manufactured	2,264,732	741,614	1,523,118
All other miscellaneous store retailers	10,650,896	5,775,773	4,875,123
Tobacco stores	3,196,273	3,040,927	155,345
All other miscellaneous store retailers	7,454,623	2,734,845	4,719,779
Non-store Retailers			
Non-store retailers	324,581,983	23,000,942	301,581,042
Electronic shopping and mail-order houses	310,149,057	17,504,294	292,644,763
Vending machine operators	1,716,853	0	1,716,853
Direct selling establishments	12,716,074	5,496,647	7,219,426
Fuel dealers	7,694,434	2,534,485	5,159,949
Other direct selling establishments	5,021,638	2,962,162	2,059,476
Non-store Retailers			
Food services and drinking places	230,238,216	161,476,941	68,761,275
Special food services	17,682,707	3,390,385	14,292,323
Food service contractors	13,951,627	1,965,320	11,986,306
Caterers	3,367,031	1,149,349	2,217,682
Mobile food services	364,049	275,715	88,334
Drinking places	7,203,669	3,817,607	3,386,062
Restaurants and other eating places	205,351,840	154,268,950	51,082,891
Full-service restaurants	101,575,587	54,795,189	46,780,399
Limited-service restaurants	88,037,853	85,411,563	2,626,290
Cafeterias, grill buffets, and buffets	2,244,552	3,762,041	(1,517,489)
Snack and non-alcoholic beverage bars	13,493,848	10,300,157	3,193,691

Source: Claritas, Retail Market Power® - 2023 Estimates and 2028 Projections, using data from Environics Analytics | U.S. Census Bureau | U.S. Bureau of Labor Statistics | Data Axle. Data adjusted for inflation from annual 2023 dollars to August 2025 dollars based on the Consumer Price Index for All Urban Consumers (CPI-U), All items - old base in Los Angeles-Long Beach-Anaheim, CA, all urban consumers.

Table A-2: Retail Stores Opportunity Gap/Surplus; Gosford Village Defined Trade Area; 2025 Estimate

	2025 Demand (\$)	2025 Supply (\$)	Opportunity Gap/Surplus (\$)
Totals			
Total retail trade including food and drink	3,309,650,846	1,987,408,261	1,322,242,585
Total retail trade	2,952,065,147	1,720,515,570	1,231,549,577
Motor Vehicle and Parts Dealers			
Motor vehicle and parts dealers	673,489,115	548,811,080	124,678,034
Automobile dealers	560,458,483	515,785,741	44,672,742
New car dealers	500,430,161	488,377,037	12,053,124
Used car dealers	60,028,323	27,408,704	32,619,618
Other motor vehicle dealers	57,366,668	11,200,729	46,165,939
Recreational vehicle dealers	20,711,750	5,809,280	14,902,470
Motorcycle, boat, and other motor vehicle dealers	36,654,918	5,391,449	31,263,470
Boat dealers	13,150,017	1,711,098	11,438,919
Motorcycle, ATV, and all other motor vehicle dealers	23,504,901	3,680,352	19,824,549
Automotive parts, accessories, and tire stores	55,663,963	21,824,610	33,839,353
Automotive parts and accessories stores	35,088,105	13,538,932	21,549,173
Tire dealers	20,575,858	8,285,679	12,290,179
Furniture and Home Furnishings Stores			
Furniture and home furnishings stores	60,695,455	23,335,142	37,360,313
Furniture stores	34,731,046	15,098,097	19,632,948
Home furnishings stores	25,964,410	8,237,045	17,727,365
Floor covering stores	12,768,267	4,509,645	8,258,622
Other home furnishings stores	13,196,144	3,727,400	9,468,744
Window treatment stores	795,005	423,739	371,266
All other home furnishings stores	12,401,139	3,303,661	9,097,478
Electronics and Appliance Stores			
Electronics and appliance stores	46,244,153	20,396,858	25,847,295
Household appliance stores	9,723,465	6,402,761	3,320,704
Electronics stores	36,520,688	13,994,097	22,526,591
Bldg. Material & Garden Equipment and Supplies Dealers			
Building material and garden equipment and supplies dealers	204,506,498	121,758,337	82,748,161
Building material and supplies dealers	178,151,336	114,608,508	63,542,828
Home centers	101,047,404	70,491,633	30,555,771
Paint and wallpaper stores	6,100,305	6,190,479	(90,174)
Hardware stores	14,874,736	8,400,099	6,474,637
Other building material dealers	56,128,892	29,526,297	26,602,594
Lawn and garden equipment and supplies stores	26,355,161	7,149,828	19,205,333
Outdoor power equipment stores	5,350,272	536,486	4,813,786
Nursery, garden center, and farm supply stores	21,004,889	6,613,343	14,391,547
Food and Beverage Stores			
Food and beverage stores	425,317,351	254,111,246	171,206,106
Grocery stores	382,486,644	231,353,736	151,132,908

	2025 Demand (\$)	2025 Supply (\$)	Opportunity Gap/Surplus (\$)
Supermarkets and other grocery	366,485,563	219,728,279	146,757,283
Convenience stores	16,001,080	11,625,458	4,375,622
Specialty food stores	11,106,694	10,882,647	224,047
Meat markets	3,392,447	2,133,746	1,258,701
Fish and seafood markets	1,334,985	1,159,633	175,352
Fruit and vegetable markets	2,329,181	2,156,415	172,766
Other specialty food stores	4,050,081	5,432,852	(1,382,772)
All other specialty food stores	1,894,328	1,014,557	879,771
Beer, wine, and liquor stores	31,724,013	11,874,863	19,849,151
Health and Personal Care Stores			
Health and personal care stores	170,050,125	103,351,052	66,699,073
Pharmacies and drug stores	146,391,750	89,462,246	56,929,504
Cosmetics, beauty supplies, and perfume stores	10,139,959	6,466,869	3,673,090
Optical goods stores	4,278,366	2,808,449	1,469,918
Other health and personal care stores	9,240,049	4,613,488	4,626,561
Food	3,269,540	2,218,158	1,051,382
All other health and personal care stores	5,970,509	2,395,330	3,575,179
Gasoline Stations			
Gasoline stations	238,115,257	212,974,888	25,140,369
Clothing and Clothing Accessories Stores			
Clothing and clothing accessories stores	144,957,449	75,094,639	69,862,810
Clothing stores	99,119,255	49,778,731	49,340,524
Men's clothing stores	3,771,397	1,227,123	2,544,274
Women's clothing stores	19,175,533	6,776,301	12,399,232
Children's and infants' clothing stores	4,410,680	3,646,199	764,481
Family clothing stores	58,034,872	32,532,956	25,501,916
Clothing accessories stores	5,006,305	1,427,965	3,578,340
Other clothing stores	8,720,467	4,168,186	4,552,280
Shoe stores	16,943,780	13,947,860	2,995,920
Jewelry, luggage, and leather goods stores	28,894,413	11,368,049	17,526,364
Jewelry stores	18,655,591	6,501,877	12,153,715
Luggage and leather goods stores	10,238,822	4,866,172	5,372,649
Sporting Goods, Hobby, Musical Instrument, & Book Stores			
Sporting goods, hobby, musical instrument, and book stores	47,840,635	21,181,619	26,659,017
Sporting goods, hobby, and musical instrument stores	42,147,921	18,643,221	23,504,701
Sporting goods stores	27,862,935	8,626,760	19,236,175
Hobby, toy, and game stores	11,020,457	7,810,544	3,209,913
Sewing, needlework, and piece goods stores	1,432,182	997,684	434,497
Musical instrument and supplies stores	1,832,348	1,208,231	624,117
Book stores and news dealers	5,692,715	2,538,398	3,154,317
Book stores	5,294,824	2,538,398	2,756,425
News dealers and newsstands	397,891	0	397,891

	2025 Demand (\$)	2025 Supply (\$)	Opportunity Gap/Surplus (\$)
General Merchandise Stores			
General merchandise stores	374,697,075	272,973,605	101,723,469
Department stores	50,436,923	29,293,099	21,143,824
Other general merchandise stores	324,260,151	243,680,505	80,579,646
Warehouse clubs and supercenters	293,950,111	219,935,832	74,014,280
All other general merchandise stores	30,310,040	23,744,674	6,565,366
Miscellaneous Store Retailers			
Miscellaneous store retailers	61,177,861	29,234,253	31,943,608
Florists	2,888,054	2,482,137	405,917
Office supplies, stationery, and gift stores	11,469,512	5,131,505	6,338,008
Office supplies and stationery stores	4,893,851	3,136,787	1,757,064
Gift, novelty, and souvenir stores	6,575,661	1,994,718	4,580,944
Used merchandise stores	8,976,389	4,713,581	4,262,809
Other miscellaneous store retailers	37,843,905	16,907,032	20,936,874
Pet and pet supplies stores	12,110,532	5,728,710	6,381,822
Art dealers	5,552,837	1,153,581	4,399,257
Manufactured	3,652,223	1,316,568	2,335,655
All other miscellaneous store retailers	16,528,313	8,708,173	7,820,140
Tobacco stores	4,966,841	4,573,895	392,946
All other miscellaneous store retailers	11,561,472	4,134,277	7,427,195
Non-store Retailers			
Non-store retailers	504,974,173	37,292,851	467,681,322
Electronic shopping and mail-order houses	482,651,354	27,474,732	455,176,623
Vending machine operators	2,692,467	399,219	2,293,248
Direct selling establishments	19,630,351	9,418,900	10,211,451
Fuel dealers	11,846,091	4,389,646	7,456,445
Other direct selling establishments	7,784,259	5,029,254	2,755,006
Non-store Retailers			
Food services and drinking places	357,585,698	266,892,691	90,693,007
Special food services	27,472,203	4,815,436	22,656,767
Food service contractors	21,676,542	3,134,102	18,542,440
Caterers	5,230,117	1,186,912	4,043,205
Mobile food services	565,544	494,422	71,122
Drinking places	11,170,529	2,098,999	9,071,529
Restaurants and other eating places	318,942,966	259,978,255	58,964,711
Full-service restaurants	157,733,437	65,118,045	92,615,392
Limited-service restaurants	136,754,882	174,667,493	(37,912,611)
Cafeterias, grill buffets, and buffets	3,486,543	4,301,698	(815,155)
Snack and non-alcoholic beverage bars	20,968,106	15,891,020	5,077,085

Source: Claritas, Retail Market Power® - 2023 Estimates and 2028 Projections, using data from Environics Analytics | U.S. Census Bureau | U.S. Bureau of Labor Statistics | Data Axle. Data adjusted for inflation from annual 2023 dollars to August 2025 dollars based on the Consumer Price Index for All Urban Consumers (CPI-U), All items - old base in Los Angeles-Long Beach-Anaheim, CA, all urban consumers.

Table A-3: Retail Stores Opportunity Gap/Surplus; Downtown Bakersfield and Valley Plaza Mall Defined Regional Trade Area; 2025 Estimate

	2025 Demand (\$)	2025 Supply (\$)	Opportunity Gap/Surplus (\$)
Totals			
Total retail trade including food and drink	9,403,056,025	7,407,770,826	1,995,285,199
Total retail trade	8,384,362,096	6,581,676,388	1,802,685,708
Motor Vehicle and Parts Dealers			
Motor vehicle and parts dealers	1,909,919,656	1,855,087,833	54,831,822
Automobile dealers	1,587,608,548	1,564,961,106	22,647,443
New car dealers	1,417,406,825	1,389,419,678	27,987,147
Used car dealers	170,201,724	175,541,428	(5,339,704)
Other motor vehicle dealers	166,037,998	107,775,044	58,262,954
Recreational vehicle dealers	60,398,297	74,102,601	(13,704,304)
Motorcycle, boat, and other motor vehicle dealers	105,639,701	33,672,444	71,967,257
Boat dealers	38,321,836	8,773,983	29,547,853
Motorcycle, ATV, and all other motor vehicle dealers	67,317,865	24,898,461	42,419,404
Automotive parts, accessories, and tire stores	156,273,109	182,351,684	(26,078,574)
Automotive parts and accessories stores	98,508,258	116,537,805	(18,029,547)
Tire dealers	57,764,851	65,813,878	(8,049,028)
Furniture and Home Furnishings Stores			
Furniture and home furnishings stores	172,931,493	110,911,650	62,019,843
Furniture stores	98,755,371	77,857,516	20,897,855
Home furnishings stores	74,176,122	33,054,134	41,121,988
Floor covering stores	36,573,284	18,414,225	18,159,059
Other home furnishings stores	37,602,838	14,639,909	22,962,929
Window treatment stores	2,294,950	1,025,120	1,269,830
All other home furnishings stores	35,307,888	13,614,788	21,693,099
Electronics and Appliance Stores			
Electronics and appliance stores	131,647,736	75,778,840	55,868,896
Household appliance stores	27,573,758	18,811,697	8,762,061
Electronics stores	104,073,978	56,967,143	47,106,835
Bldg. Material & Garden Equipment and Supplies Dealers			
Building material and garden equipment and supplies dealers	574,667,671	459,769,360	114,898,311
Building material and supplies dealers	500,388,138	425,206,556	75,181,582
Home centers	284,164,365	242,205,496	41,958,869
Paint and wallpaper stores	16,962,733	24,122,128	(7,159,395)
Hardware stores	41,790,068	34,117,894	7,672,174
Other building material dealers	157,470,972	124,761,038	32,709,935
Lawn and garden equipment and supplies stores	74,279,532	34,562,803	39,716,730
Outdoor power equipment stores	15,076,935	1,554,795	13,522,141
Nursery, garden center, and farm supply stores	59,202,597	33,008,008	26,194,589
Food and Beverage Stores			
Food and beverage stores	1,213,124,495	1,005,879,087	207,245,408

	2025 Demand (\$)	2025 Supply (\$)	Opportunity Gap/Surplus (\$)
Grocery stores	1,090,678,816	938,280,597	152,398,219
Supermarkets and other grocery	1,044,967,237	899,064,545	145,902,692
Convenience stores	45,711,579	39,216,051	6,495,527
Specialty food stores	31,674,148	29,838,523	1,835,625
Meat markets	9,671,712	5,409,156	4,262,556
Fish and seafood markets	3,806,378	3,388,211	418,167
Fruit and vegetable markets	6,643,368	5,744,895	898,473
Other specialty food stores	11,552,691	15,296,261	(3,743,571)
All other specialty food stores	5,400,856	3,372,380	2,028,476
Beer, wine, and liquor stores	90,771,532	37,759,967	53,011,565
Health and Personal Care Stores			
Health and personal care stores	481,222,799	449,204,558	32,018,241
Pharmacies and drug stores	414,646,598	412,073,652	2,572,946
Cosmetics, beauty supplies, and perfume stores	28,713,163	18,106,322	10,606,842
Optical goods stores	11,714,806	6,476,972	5,237,834
Other health and personal care stores	26,148,231	12,547,612	13,600,620
Food	9,255,218	5,989,960	3,265,258
All other health and personal care stores	16,893,013	6,557,650	10,335,363
Gasoline Stations			
Gasoline stations	679,321,407	1,006,043,805	(326,722,398)
Clothing and Clothing Accessories Stores			
Clothing and clothing accessories stores	412,200,102	307,744,583	104,455,519
Clothing stores	281,633,212	225,842,037	55,791,175
Men's clothing stores	10,657,110	3,423,536	7,233,575
Women's clothing stores	54,615,178	28,068,001	26,547,177
Children's and infants' clothing stores	12,498,278	12,555,958	(57,680)
Family clothing stores	164,856,820	162,778,585	2,078,235
Clothing accessories stores	14,209,219	4,060,638	10,148,582
Other clothing stores	24,796,607	14,955,319	9,841,288
Shoe stores	48,329,373	44,774,807	3,554,566
Jewelry, luggage, and leather goods stores	82,237,517	37,127,740	45,109,777
Jewelry stores	53,158,351	22,914,276	30,244,074
Luggage and leather goods stores	29,079,167	14,213,465	14,865,703
Sporting Goods, Hobby, Musical Instrument, & Book Stores			
Sporting goods, hobby, musical instrument, and book stores	135,527,040	65,164,154	70,362,887
Sporting goods, hobby, and musical instrument stores	119,295,201	57,631,642	61,663,559
Sporting goods stores	78,748,495	27,249,311	51,499,184
Hobby, toy, and game stores	31,269,607	24,509,417	6,760,190
Sewing, needlework, and piece goods stores	4,087,129	2,665,698	1,421,431
Musical instrument and supplies stores	5,189,969	3,207,215	1,982,754
Book stores and news dealers	16,231,840	7,532,513	8,699,327
Book stores	15,098,790	6,988,898	8,109,893

	2025 Demand (\$)	2025 Supply (\$)	Opportunity Gap/Surplus (\$)
News dealers and newsstands	1,133,050	543,615	589,435
General Merchandise Stores			
General merchandise stores	1,065,463,938	1,035,119,504	30,344,434
Department stores	143,395,708	97,877,570	45,518,138
Other general merchandise stores	922,068,230	937,241,934	(15,173,704)
Warehouse clubs and supercenters	835,885,369	854,130,497	(18,245,128)
All other general merchandise stores	86,182,862	83,111,437	3,071,425
Miscellaneous Store Retailers			
Miscellaneous store retailers	174,478,304	90,718,627	83,759,676
Florists	8,140,748	6,792,774	1,347,973
Office supplies, stationery, and gift stores	32,695,099	15,434,440	17,260,658
Office supplies and stationery stores	13,950,666	9,637,365	4,313,301
Gift, novelty, and souvenir stores	18,744,432	5,797,075	12,947,357
Used merchandise stores	25,661,250	13,620,742	12,040,507
Other miscellaneous store retailers	107,981,208	54,870,670	53,110,538
Pet and pet supplies stores	34,374,884	18,586,326	15,788,558
Art dealers	15,877,093	3,367,178	12,509,915
Manufactured	10,654,162	3,919,086	6,735,077
All other miscellaneous store retailers	47,075,068	28,998,079	18,076,989
Tobacco stores	14,276,968	15,263,823	(986,855)
All other miscellaneous store retailers	32,798,100	13,734,256	19,063,843
Non-store Retailers			
Non-store retailers	1,433,857,455	120,254,387	1,313,603,068
Electronic shopping and mail-order houses	1,370,648,267	89,719,124	1,280,929,143
Vending machine operators	7,680,810	2,332,174	5,348,637
Direct selling establishments	55,528,379	28,203,090	27,325,289
Fuel dealers	33,438,788	13,027,872	20,410,916
Other direct selling establishments	22,089,591	15,175,218	6,914,373
Non-store Retailers			
Food services and drinking places	1,018,693,927	826,094,438	192,599,490
Special food services	78,451,959	16,818,933	61,633,026
Food service contractors	61,968,626	10,951,144	51,017,482
Caterers	14,875,270	3,932,391	10,942,879
Mobile food services	1,608,062	1,935,398	(327,335)
Drinking places	32,172,498	13,522,135	18,650,363
Restaurants and other eating places	908,069,471	795,753,370	112,316,101
Full-service restaurants	449,638,016	239,111,601	210,526,415
Limited-service restaurants	388,888,498	482,536,732	(93,648,234)
Cafeterias, grill buffets, and buffets	9,914,266	15,801,465	(5,887,200)
Snack and non-alcoholic beverage bars	59,628,692	58,303,571	1,325,121

Source: Claritas, Retail Market Power® - 2023 Estimates and 2028 Projections, using data from Environics Analytics | U.S. Census Bureau | U.S. Bureau of Labor Statistics | Data Axle. Data adjusted for inflation from annual 2023 dollars to August 2025 dollars based on the Consumer Price Index for All Urban Consumers (CPI-U), All items - old base in Los Angeles-Long Beach-Anaheim, CA, all urban consumers.

Table A-4: Opportunity Gap/Surplus by Store Type and Capture Adjustment; Proposed Project and Comparison Trade Areas; 2025 Estimate

Store Type	Capture Adjustment	Proposed Project Trade Area	Gosford Village Trade Area	Regional Downtown Trade Area
Furniture & Home Furnishings Stores		6,880,101	22,186,450	62,019,843
Furniture Stores	75%	782,273	10,950,187	20,897,855
Home Furnishings Stores	75%	6,097,829	11,236,263	41,121,988
Electronics & Appliance Stores	75%	7,319,011	14,286,256	55,868,896
Bldg Materials, Garden Equip. & Supply Stores		(13,444,438)	31,621,536	114,898,311
Bldg Material & Supplies Dealers	75%	(14,912,105)	19,004,994	75,181,582
Lawn & Garden Equip & Supply Stores	75%	1,467,667	12,616,542	39,716,730
Food & Beverage Stores		125,836,532	128,674,370	207,245,408
Grocery Stores	90%	103,841,131	112,884,243	152,398,219
Specialty Food Stores	90%	4,881,346	(886,622)	1,835,625
Beer, Wine & Liquor Stores	90%	17,114,053	16,676,749	53,011,565
Health & Personal Care Stores		39,000,908	49,694,061	32,018,241
Gasoline Stations		14,102,639	1,328,843	(326,722,398)
Clothing & Clothing Accessories Stores		2,887,079	(2,615,915)	104,455,519
Clothing Stores	50%	2,372,752	(219,103)	55,791,175
Shoe Stores	50%	(2,423,970)	(5,475,970)	3,554,566
Jewelry, Luggage & Leather Goods Stores	50%	2,938,297	3,079,157	45,109,777
Sporting Goods, Hobby, Book & Music Stores		10,772,150	14,698,858	70,362,887
Sporting Goods/Hobby/Musical Instr Stores	75%	8,798,467	12,967,721	61,663,559
Book, Periodical & Music Stores	75%	1,973,683	1,731,138	8,699,327
General Merchandise Stores		(13,637,931)	(4,560,029)	30,344,434
Department Stores Excluding Leased Depts.	50%	(2,641,760)	(4,074,637)	45,518,138
Other General Merchandise Stores	75%	(10,996,171)	(485,392)	(15,173,704)
Miscellaneous Store Retailers		12,729,920	54,098,778	57,681,102
Florists	90%	736,091	117,112	1,347,973
Office Supplies, Stationery & Gift Stores	90%	3,668,240	5,191,056	17,260,658
Used Merchandise Stores	90%	2,712,631	3,365,170	12,040,507
Other Miscellaneous Store Retailers	90%	10,913,399	17,152,483	53,110,538
Auto Parts, Accessories & Tire Stores	90%	(5,300,441)	28,272,957	(26,078,574)
Food Services & Drinking Places		(2,422,251)	20,027,570	229,176,777
Drinking Places - Alcoholic Beverages	75%	1,585,145	6,278,897	18,650,363

Store Type	Capture Adjustment	Proposed Project Trade Area	Gosford Village Trade Area	Regional Downtown Trade Area
Full-service restaurants	50%	(4,007,395)	13,748,673	210,526,415
Limited-service restaurants	90%	(6,177,495)	(51,588,099)	(93,648,234)

Source: PlaceWorks, 2025, using data from Claritas. Consumer spending data adjusted for inflation from annual 2023 dollars to August 2025 dollars based on the Consumer Price Index for All Urban Consumers (CPI-U), All items - old base in Los Angeles-Long Beach-Anaheim, CA, all urban consumers. Estimated retail supply data adjusted for inflation from annual 2023 dollars to August 2025 dollars based on the Producer Price Index industry data for Total retail trade industries.

Table A-5: Socioeconomic Characteristics; Proposed Project Trade Area; 2025 Estimate

Community Profile

Project Trade Area

Area: 96.75 square miles



Population Summary

2010 Total Population	90,169
2020 Total Population	103,156
2020 Group Quarters	660
2025 Total Population	107,381
2025 Group Quarters	493
2030 Total Population	108,436
2025-2030 Annual Rate	0.20%
2025 Total Daytime Population	109,250
Workers	51,098
Residents	58,152

Household Summary

2010 Total Households	30,090
2010 Average Household Size	2.99
2020 Total Households	33,979
2020 Average Household Size	3.02
2025 Total Households	35,961
2025 Average Household Size	2.97
2030 Total Households	36,695
2030 Average Household Size	2.94
2025-2030 Annual Rate	0.40%
2025 Families	28,287
2025 Average Family Size	3.34
2030 Families	28,856
2030 Average Family Size	3.31
2025-2030 Growth Rate	0.4%



Source: Esri forecasts for 2025 and 2030. U.S. Census 2010 and 2020 Census data converted by Esri into 2020 geography. Consumer Spending data are derived from the 2022 and 2023 Consumer Expenditure Surveys, Bureau of Labor Statistics.

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Community Profile | Project Trade Area | Area: 96.75 square miles

Housing Unit Summary

2010 Total Housing Units	31,946
Owner Occupied Housing Units	76.0%
Renter Occupied Housing Units	24.0%
Vacant Housing Units	5.8%
2020 Housing Units	34,910
Owner Occupied Housing Units	76.5%
Renter Occupied Housing Units	23.4%
Vacant Housing Units	2.8%
2025 Housing Units	36,972
Owner Occupied Housing Units	77.9%
Renter Occupied Housing Units	22.1%
Vacant Housing Units	2.7%
2030 Total Housing Units	37,662
Owner Occupied Housing Units	78.8%
Renter Occupied Housing Units	21.2%
Vacant Housing Units	2.6%

Median Household Income

2025	\$113,180
2030	\$126,557

Per Capita Income

2025	\$45,507
2030	\$50,382

2025 Households by Income

Household Income Base	35,961
<\$15,000	5.1%
\$15,000 - \$24,999	2.9%
\$25,000 - \$34,999	3.7%
\$35,000 - \$49,999	7.0%
\$50,000 - \$74,999	11.6%
\$75,000 - \$99,999	12.6%
\$100,000 - \$149,999	21.1%
\$150,000 - \$199,999	19.4%
\$200,000+	16.6%
Average Household Income	\$135,879



Source: Esri forecasts for 2025 and 2030. U.S. Census 2010 and 2020 Census data converted by Esri into 2020 geography. Consumer Spending data are derived from the 2022 and 2023 Consumer Expenditure Surveys, Bureau of Labor Statistics.

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Community Profile | Project Trade Area | Area: 96.75 square miles

2025 Affordability, Mortgage and Wealth

Housing Affordability Index	97
Percent of Income for Mortgage	24.4%
Wealth Index	117

Median Home Value

2025	\$440,379
2030	\$487,691

2025 Home Value

Total Owner Occupied Housing Units	28,008
<\$50,000	1.2%
\$50,000 - \$99,999	0.3%
\$100,000 - \$149,999	0.3%
\$150,000 - \$199,999	0.7%
\$200,000 - \$249,999	1.5%
\$250,000 - \$299,999	4.3%
\$300,000 - \$399,999	27.3%
\$400,000 - \$499,999	35.8%
\$500,000 - \$749,999	22.8%
\$750,000 - \$999,999	3.9%
\$1,000,000 - \$1,499,999	1.0%
\$1,500,000 - \$1,999,999	0.4%
\$2,000,000 +	0.6%
Average Home Value	\$483,052

2025 Population by Sex

Males	53,299
Females	54,082

Median Age

2010	34.0
2020	36.3
2025	37.1
2030	37.8



Source: Esri forecasts for 2025 and 2030. U.S. Census 2010 and 2020 Census data converted by Esri into 2020 geography. Consumer Spending data are derived from the 2022 and 2023 Consumer Expenditure Surveys, Bureau of Labor Statistics.

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Community Profile | Project Trade Area | Area: 96.75 square miles

2025 Population by Age

Total	107,381
0 - 4	6.1%
5 - 9	6.7%
10 - 14	7.4%
15 - 24	13.7%
25 - 34	13.2%
35 - 44	14.4%
45 - 54	13.3%
55 - 64	11.2%
65 - 74	8.7%
75 - 84	4.4%
85 +	1.3%
18 +	75.2%

2025 Pop 25+ by Educational Attainment

Total	71,041
Less than 9th Grade	3.5%
9th - 12th Grade, No Diploma	3.9%
High School Graduate	20.1%
GED/Alternative Credential	3.0%
Some College, No Degree	24.3%
Associate Degree	10.9%
Bachelor's Degree	21.5%
Graduate/Professional Degree	12.7%

2025 Population 15+ by Marital Status

Total	85,706
Never Married	29.8%
Married	58.4%
Widowed	4.9%
Divorced	6.9%



Source: Esri forecasts for 2025 and 2030. U.S. Census 2010 and 2020 Census data converted by Esri into 2020 geography. Consumer Spending data are derived from the 2022 and 2023 Consumer Expenditure Surveys, Bureau of Labor Statistics.

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Community Profile | Project Trade Area | Area: 96.75 square miles

2020 Population by Race/Ethnicity

Total	103,156
White Alone	63.4%
Black Alone	2.6%
American Indian Alone	1.3%
Asian Alone	6.5%
Pacific Islander Alone	0.1%
Some Other Race Alone	12.3%
Two or More Races	12.3%
Hispanic Origin	28.6%
Diversity Index	73.9

2025 Population by Race/Ethnicity

Total	107,382
White Alone	59.3%
Black Alone	2.8%
American Indian Alone	1.3%
Asian Alone	7.0%
Pacific Islander Alone	0.1%
Some Other Race Alone	14.4%
Two or More Races	15.0%
Hispanic Origin	32.7%
Diversity Index	77.6

2025 Employed Pop 16+ by Occupation

Total	52,666
White Collar	64.9%
Management/Business/Financial	17.3%
Professional	29.9%
Sales	6.8%
Administrative Support	10.9%
Services	16.5%



Source: Esri forecasts for 2025 and 2030. U.S. Census 2010 and 2020 Census data converted by Esri into 2020 geography. Consumer Spending data are derived from the 2022 and 2023 Consumer Expenditure Surveys, Bureau of Labor Statistics.

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Community Profile | Project Trade Area | Area: 96.75 square miles

2025 Employed Pop 16+ by Occupation

Total	52,666
Blue Collar	18.5%
Farming/Forestry/Fishing	0.6%
Construction/Extraction	6.3%
Installation/Maintenance/Repair	2.8%
Production	2.5%
Transportation/Material Moving	6.4%

2025 Civilian Population 16+ in Labor Force

Civilian Population 16+	52,666
Population 16+ Employed	94.7%
Population 16+ Unemployment rate	5.3%
Population 16-24 Employed	9.9%
Population 16-24 Unemployment rate	17.7%
Population 25-54 Employed	64.4%
Population 25-54 Unemployment rate	3.0%
Population 55-64 Employed	15%
Population 55-64 Unemployment rate	5.7%
Population 65+ Employed	5%
Population 65+ Unemployment rate	4.5%

2025 Employed Population 16+ by Industry

Total	49,888
Agriculture/Mining	5.4%
Construction	8.4%
Manufacturing	4.0%
Wholesale Trade	1.7%
Retail Trade	7.8%
Transportation/Utilities	5.5%
Information	1%
Finance/Insurance/Real Estate	4.3%
Services	51.8%
Public Administration	10.2%



Source: Esri forecasts for 2025 and 2030. U.S. Census 2010 and 2020 Census data converted by Esri into 2020 geography. Consumer Spending data are derived from the 2022 and 2023 Consumer Expenditure Surveys, Bureau of Labor Statistics.

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Community Profile | Project Trade Area | Area: 96.75 square miles

2025 Consumer Spending

Apparel & Services: Total \$	\$102,723,878
Average Spent	\$2,856.54
Spending Potential Index	117
Education: Total \$	\$73,183,911
Average Spent	\$2,035.09
Spending Potential Index	114
Entertainment/Recreation: Total \$	\$171,316,762
Average Spent	\$4,763.96
Spending Potential Index	116
Food at Home: Total \$	\$297,863,995
Average Spent	\$8,282.97
Spending Potential Index	111
Food Away from Home: Total \$	\$172,590,444
Average Spent	\$4,799.38
Spending Potential Index	116
Health Care: Total \$	\$314,655,222
Average Spent	\$8,749.90
Spending Potential Index	113
HH Furnishings & Equipment: Total \$	\$122,822,946
Average Spent	\$3,415.45
Spending Potential Index	117
Personal Care Products & Services: Total \$	\$43,837,158
Average Spent	\$1,219.02
Spending Potential Index	116
Shelter: Total \$	\$1,097,571,349
Average Spent	\$30,521.16
Spending Potential Index	115
Support Payments/Gifts in Kind: Total \$	\$147,867,991
Average Spent	\$4,111.90
Spending Potential Index	125



Source: Esri forecasts for 2025 and 2030. U.S. Census 2010 and 2020 Census data converted by Esri into 2020 geography. Consumer Spending data are derived from the 2022 and 2023 Consumer Expenditure Surveys, Bureau of Labor Statistics.

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Community Profile | Project Trade Area | Area: 96.75 square miles

2025 Consumer Spending	
Travel: Total \$	\$154,263,308
Average Spent	\$4,289.74
Spending Potential Index	119
Vehicle Maintenance & Repairs: Total \$	\$55,749,425
Average Spent	\$1,550.27
Spending Potential Index	115

Top Tapestry Segment

Boomburbs (H2):

This segment is characterized by high-earning suburban families in the South and West.

[Learn more about this segment...](#)

Data Note: Household population includes persons not residing in group quarters. Average Household Size is the household population divided by total households. Persons in families include the householder and persons related to the householder by birth, marriage, or adoption. Per Capita Income represents the income received by all persons aged 15 years and over divided by the total population.

Income represents the preceding year, expressed in current dollars. Household income includes wage and salary earnings, interest dividends, net rents, pensions, SSI and welfare payments, child support, and alimony.

Persons of Hispanic Origin may be of any race. The Diversity Index measures the probability that two people from the same area will be from different race/ethnic groups.

Consumer spending shows the amount spent on a variety of goods and services by households that reside in the area. Expenditures are shown by broad budget categories that are not mutually exclusive. Consumer spending does not equal business revenue. Total and Average Amount Spent Per Household represent annual figures. The Spending Potential Index represents the amount spent in the area relative to a national average of 100.

 **Source:** Esri forecasts for 2025 and 2030. U.S. Census 2010 and 2020 Census data converted by Esri into 2020 geography. Consumer Spending data are derived from the 2022 and 2023 Consumer Expenditure Surveys, Bureau of Labor Statistics.

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Table A-6: Socioeconomic Characteristics; Gosford Village / River Walk Trade Area; Estimate 2025

Community Profile

Gosford / River Walk Trade Area

Area: 122.82 square miles



Population Summary

2010 Total Population	148,686
2020 Total Population	180,494
2020 Group Quarters	1,347
2025 Total Population	191,983
2025 Group Quarters	1,057
2030 Total Population	194,399
2025-2030 Annual Rate	0.25%
2025 Total Daytime Population	179,538
Workers	72,820
Residents	106,718

Household Summary

2010 Total Households	49,434
2010 Average Household Size	2.99
2020 Total Households	58,456
2020 Average Household Size	3.06
2025 Total Households	62,858
2025 Average Household Size	3.04
2030 Total Households	64,285
2030 Average Household Size	3.01
2025-2030 Annual Rate	0.45%
2025 Families	46,584
2025 Average Family Size	3.50
2030 Families	47,610
2030 Average Family Size	3.46
2025-2030 Growth Rate	0.4%



Source: Esri forecasts for 2025 and 2030. U.S. Census 2010 and 2020 Census data converted by Esri into 2020 geography. Consumer Spending data are derived from the 2022 and 2023 Consumer Expenditure Surveys, Bureau of Labor Statistics.

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Community Profile

| Gosford / River Walk Trade Area | Area: 122.82 square miles

Housing Unit Summary

2010 Total Housing Units	53,201
Owner Occupied Housing Units	63.7%
Renter Occupied Housing Units	36.3%
Vacant Housing Units	7.1%
2020 Housing Units	60,627
Owner Occupied Housing Units	63.6%
Renter Occupied Housing Units	36.4%
Vacant Housing Units	3.5%
2025 Housing Units	65,309
Owner Occupied Housing Units	65.5%
Renter Occupied Housing Units	34.5%
Vacant Housing Units	3.8%
2030 Total Housing Units	66,757
Owner Occupied Housing Units	66.7%
Renter Occupied Housing Units	33.3%
Vacant Housing Units	3.7%

Median Household Income

2025	\$91,446
2030	\$101,743

Per Capita Income

2025	\$39,207
2030	\$43,609

2025 Households by Income

Household Income Base	62,857
<\$15,000	6.4%
\$15,000 - \$24,999	3.8%
\$25,000 - \$34,999	5.2%
\$35,000 - \$49,999	7.7%
\$50,000 - \$74,999	17.4%
\$75,000 - \$99,999	13.3%
\$100,000 - \$149,999	20.8%
\$150,000 - \$199,999	12.4%
\$200,000+	13.0%
Average Household Income	\$119,789



Source: Esri forecasts for 2025 and 2030. U.S. Census 2010 and 2020 Census data converted by Esri into 2020 geography. Consumer Spending data are derived from the 2022 and 2023 Consumer Expenditure Surveys, Bureau of Labor Statistics.

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Community Profile

| Gosford / River Walk Trade Area | Area: 122.82 square miles

2025 Affordability, Mortgage and Wealth

Housing Affordability Index	88
Percent of Income for Mortgage	26.8%
Wealth Index	96

Median Home Value

2025	\$391,369
2030	\$447,938

2025 Home Value

Total Owner Occupied Housing Units	41,164
<\$50,000	2.0%
\$50,000 - \$99,999	0.4%
\$100,000 - \$149,999	0.9%
\$150,000 - \$199,999	1.5%
\$200,000 - \$249,999	4.4%
\$250,000 - \$299,999	10.5%
\$300,000 - \$399,999	33.1%
\$400,000 - \$499,999	22.4%
\$500,000 - \$749,999	18.6%
\$750,000 - \$999,999	3.2%
\$1,000,000 - \$1,499,999	2.1%
\$1,500,000 - \$1,999,999	0.4%
\$2,000,000 +	0.4%
Average Home Value	\$446,917

2025 Population by Sex

Males	94,980
Females	97,003

Median Age

2010	31.5
2020	33.5
2025	34.7
2030	36.1



Source: Esri forecasts for 2025 and 2030. U.S. Census 2010 and 2020 Census data converted by Esri into 2020 geography. Consumer Spending data are derived from the 2022 and 2023 Consumer Expenditure Surveys, Bureau of Labor Statistics.

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Community Profile

| Gosford / River Walk Trade Area | Area: 122.82 square miles

2025 Population by Age

Total	191,985
0 - 4	6.6%
5 - 9	7.0%
10 - 14	7.3%
15 - 24	13.9%
25 - 34	15.7%
35 - 44	14.6%
45 - 54	11.9%
55 - 64	9.8%
65 - 74	8.2%
75 - 84	4.1%
85 +	1.3%
18 +	74.7%

2025 Pop 25+ by Educational Attainment

Total	125,090
Less than 9th Grade	6.0%
9th - 12th Grade, No Diploma	7.1%
High School Graduate	22.6%
GED/Alternative Credential	2.9%
Some College, No Degree	22.3%
Associate Degree	9.6%
Bachelor's Degree	19.2%
Graduate/Professional Degree	10.3%

2025 Population 15+ by Marital Status

Total	151,791
Never Married	35.8%
Married	51.5%
Widowed	4.6%
Divorced	8.1%



Source: Esri forecasts for 2025 and 2030. U.S. Census 2010 and 2020 Census data converted by Esri into 2020 geography. Consumer Spending data are derived from the 2022 and 2023 Consumer Expenditure Surveys, Bureau of Labor Statistics.

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Community Profile

| Gosford / River Walk Trade Area | Area: 122.82 square miles

2020 Population by Race/Ethnicity

Total	180,494
White Alone	39.6%
Black Alone	7.3%
American Indian Alone	1.6%
Asian Alone	11.8%
Pacific Islander Alone	0.2%
Some Other Race Alone	23.5%
Two or More Races	23.5%
Hispanic Origin	46.4%
Diversity Index	87.1

2025 Population by Race/Ethnicity

Total	191,982
White Alone	36.5%
Black Alone	7.3%
American Indian Alone	1.6%
Asian Alone	12.3%
Pacific Islander Alone	0.2%
Some Other Race Alone	25.4%
Two or More Races	16.7%
Hispanic Origin	49.5%
Diversity Index	87.7

2025 Employed Pop 16+ by Occupation

Total	91,964
White Collar	56.7%
Management/Business/Financial	14.1%
Professional	24.3%
Sales	7.8%
Administrative Support	10.6%
Services	18.1%



Source: Esri forecasts for 2025 and 2030. U.S. Census 2010 and 2020 Census data converted by Esri into 2020 geography. Consumer Spending data are derived from the 2022 and 2023 Consumer Expenditure Surveys, Bureau of Labor Statistics.

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Community Profile | Gosford / River Walk Trade Area | Area: 122.82 square miles

2025 Employed Pop 16+ by Occupation

Total	91,964
Blue Collar	25.2%
Farming/Forestry/Fishing	1.6%
Construction/Extraction	5.3%
Installation/Maintenance/Repair	3.1%
Production	3.5%
Transportation/Material Moving	11.7%

2025 Civilian Population 16+ in Labor Force

Civilian Population 16+	91,964
Population 16+ Employed	94.4%
Population 16+ Unemployment rate	5.6%
Population 16-24 Employed	11.9%
Population 16-24 Unemployment rate	12.1%
Population 25-54 Employed	65.6%
Population 25-54 Unemployment rate	4.3%
Population 55-64 Employed	13%
Population 55-64 Unemployment rate	5.0%
Population 65+ Employed	4%
Population 65+ Unemployment rate	6.7%

2025 Employed Population 16+ by Industry

Total	86,842
Agriculture/Mining	6.1%
Construction	6.2%
Manufacturing	4.7%
Wholesale Trade	2.3%
Retail Trade	10.5%
Transportation/Utilities	8.6%
Information	1%
Finance/Insurance/Real Estate	4.2%
Services	49.2%
Public Administration	7.0%



Source: Esri forecasts for 2025 and 2030. U.S. Census 2010 and 2020 Census data converted by Esri into 2020 geography. Consumer Spending data are derived from the 2022 and 2023 Consumer Expenditure Surveys, Bureau of Labor Statistics.

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Community Profile

| Gosford / River Walk Trade Area | Area: 122.82 square miles

2025 Consumer Spending

Apparel & Services: Total \$	\$161,145,474
Average Spent	\$2,563.64
Spending Potential Index	105
Education: Total \$	\$109,557,187
Average Spent	\$1,742.93
Spending Potential Index	98
Entertainment/Recreation: Total \$	\$261,682,215
Average Spent	\$4,163.07
Spending Potential Index	101
Food at Home: Total \$	\$469,894,001
Average Spent	\$7,475.48
Spending Potential Index	100
Food Away from Home: Total \$	\$272,603,191
Average Spent	\$4,336.81
Spending Potential Index	105
Health Care: Total \$	\$481,054,108
Average Spent	\$7,653.03
Spending Potential Index	99
HH Furnishings & Equipment: Total \$	\$188,566,351
Average Spent	\$2,999.88
Spending Potential Index	103
Personal Care Products & Services: Total \$	\$68,594,682
Average Spent	\$1,091.26
Spending Potential Index	104
Shelter: Total \$	\$1,743,957,705
Average Spent	\$27,744.40
Spending Potential Index	104
Support Payments/Gifts in Kind: Total \$	\$222,418,704
Average Spent	\$3,538.43
Spending Potential Index	107



Source: Esri forecasts for 2025 and 2030. U.S. Census 2010 and 2020 Census data converted by Esri into 2020 geography. Consumer Spending data are derived from the 2022 and 2023 Consumer Expenditure Surveys, Bureau of Labor Statistics.

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Community Profile

| Gosford / River Walk Trade Area | Area: 122.82 square miles

2025 Consumer Spending

Travel: Total \$	\$232,963,901
Average Spent	\$3,706.19
Spending Potential Index	103
Vehicle Maintenance & Repairs: Total \$	\$87,446,946
Average Spent	\$1,391.18
Spending Potential Index	103

Top Tapestry Segment

Boomburbs (H2):

This segment is characterized by high-earning suburban families in the South and West.

[Learn more about this segment...](#)

Data Note: Household population includes persons not residing in group quarters. Average Household Size is the household population divided by total households. Persons in families include the householder and persons related to the householder by birth, marriage, or adoption. Per Capita Income represents the income received by all persons aged 15 years and over divided by the total population.

Income represents the preceding year, expressed in current dollars. Household income includes wage and salary earnings, interest dividends, net rents, pensions, SSI and welfare payments, child support, and alimony.

Persons of Hispanic Origin may be of any race. The Diversity Index measures the probability that two people from the same area will be from different race/ethnic groups.

Consumer spending shows the amount spent on a variety of goods and services by households that reside in the area. Expenditures are shown by broad budget categories that are not mutually exclusive. Consumer spending does not equal business revenue. Total and Average Amount Spent Per Household represent annual figures. The Spending Potential Index represents the amount spent in the area relative to a national average of 100.



Source: Esri forecasts for 2025 and 2030. U.S. Census 2010 and 2020 Census data converted by Esri into 2020 geography. Consumer Spending data are derived from the 2022 and 2023 Consumer Expenditure Surveys, Bureau of Labor Statistics.

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Table A-7: Socioeconomic Characteristics; Downtown Bakersfield Regional Trade Area; Estimate 2025

Community Profile	
Downtown Bakersfield	
Rings: 12 mile radii	
	
Population Summary	12 miles
2010 Total Population	534,022
2020 Total Population	600,909
2020 Group Quarters	6,404
2025 Total Population	618,388
2025 Group Quarters	5,019
2030 Total Population	627,020
2025-2030 Annual Rate	0.28%
2025 Total Daytime Population	603,402
Workers	237,655
Residents	365,747
Household Summary	
2010 Total Households	166,886
2010 Average Household Size	3.17
2020 Total Households	187,779
2020 Average Household Size	3.17
2025 Total Households	197,065
2025 Average Household Size	3.11
2030 Total Households	202,057
2030 Average Household Size	3.08
2025-2030 Annual Rate	0.50%
2025 Families	146,294
2025 Average Family Size	3.57
2030 Families	149,894
2030 Average Family Size	3.53
2025-2030 Growth Rate	0.5%

 **Source:** Esri forecasts for 2025 and 2030. U.S. Census 2010 and 2020 Census data converted by Esri into 2020 geography. Consumer Spending data are derived from the 2022 and 2023 Consumer Expenditure Surveys, Bureau of Labor Statistics.

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Community Profile | Downtown Bakersfield | Rings: 12 mile radii

Housing Unit Summary

2010 Total Housing Units	181,702
Owner Occupied Housing Units	58.9%
Renter Occupied Housing Units	41.1%
Vacant Housing Units	8.2%
2020 Housing Units	195,516
Owner Occupied Housing Units	58.0%
Renter Occupied Housing Units	42.0%
Vacant Housing Units	4.0%
2025 Housing Units	205,280
Owner Occupied Housing Units	59.5%
Renter Occupied Housing Units	40.5%
Vacant Housing Units	4.0%
2030 Total Housing Units	210,379
Owner Occupied Housing Units	60.8%
Renter Occupied Housing Units	39.2%
Vacant Housing Units	4.0%

Median Household Income
12 miles

2025	\$74,908
2030	\$82,198

Per Capita Income

2025	\$31,980
2030	\$35,568

2025 Households by Income

Household Income Base	197,064
<\$15,000	9.7%
\$15,000 - \$24,999	6.1%
\$25,000 - \$34,999	7.3%
\$35,000 - \$49,999	9.8%
\$50,000 - \$74,999	17.1%
\$75,000 - \$99,999	12.9%
\$100,000 - \$149,999	17.4%
\$150,000 - \$199,999	10.4%
\$200,000+	9.3%
Average Household Income	\$100,263



Source: Esri forecasts for 2025 and 2030. U.S. Census 2010 and 2020 Census data converted by Esri into 2020 geography. Consumer Spending data are derived from the 2022 and 2023 Consumer Expenditure Surveys, Bureau of Labor Statistics.

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Community Profile | Downtown Bakersfield | Rings: 12 mile radii

2025 Affordability, Mortgage and Wealth

Housing Affordability Index	75
Percent of Income for Mortgage	31.3%
Wealth Index	77

Median Home Value

2025	\$374,446
2030	\$431,367

2025 Home Value **12 miles**

Total Owner Occupied Housing Units	117,208
<\$50,000	3.2%
\$50,000 - \$99,999	2.0%
\$100,000 - \$149,999	3.0%
\$150,000 - \$199,999	4.0%
\$200,000 - \$249,999	7.5%
\$250,000 - \$299,999	9.6%
\$300,000 - \$399,999	27.8%
\$400,000 - \$499,999	21.0%
\$500,000 - \$749,999	16.6%
\$750,000 - \$999,999	3.0%
\$1,000,000 - \$1,499,999	1.5%
\$1,500,000 - \$1,999,999	0.4%
\$2,000,000 +	0.5%
Average Home Value	\$413,341

2025 Population by Sex

Males	307,623
Females	310,765

Median Age

2010	29.9
2020	32.4
2025	33.4
2030	34.5



Source: Esri forecasts for 2025 and 2030. U.S. Census 2010 and 2020 Census data converted by Esri into 2020 geography. Consumer Spending data are derived from the 2022 and 2023 Consumer Expenditure Surveys, Bureau of Labor Statistics.

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Community Profile | Downtown Bakersfield | Rings: 12 mile radii

2025 Population by Age	12 miles
Total	618,387
0 - 4	7.1%
5 - 9	7.3%
10 - 14	7.8%
15 - 24	15.2%
25 - 34	15.1%
35 - 44	13.7%
45 - 54	11.6%
55 - 64	9.8%
65 - 74	7.9%
75 - 84	3.8%
85 +	1.1%
18 +	73.0%

2025 Pop 25+ by Educational Attainment	
Total	387,282
Less than 9th Grade	10.4%
9th - 12th Grade, No Diploma	9.3%
High School Graduate	24.8%
GED/Alternative Credential	3.5%
Some College, No Degree	21.1%
Associate Degree	8.6%
Bachelor's Degree	14.7%
Graduate/Professional Degree	7.6%

2025 Population 15+ by Marital Status	
Total	481,291
Never Married	39.5%
Married	47.4%
Widowed	4.6%
Divorced	8.5%



Source: Esri forecasts for 2025 and 2030. U.S. Census 2010 and 2020 Census data converted by Esri into 2020 geography. Consumer Spending data are derived from the 2022 and 2023 Consumer Expenditure Surveys, Bureau of Labor Statistics.

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Community Profile | Downtown Bakersfield | Rings: 12 mile radii

2020 Population by Race/Ethnicity	12 miles
Total	600,909
White Alone	40.2%
Black Alone	5.8%
American Indian Alone	2.0%
Asian Alone	5.7%
Pacific Islander Alone	0.1%
Some Other Race Alone	29.4%
Two or More Races	29.4%
Hispanic Origin	55.1%
Diversity Index	85.7

2025 Population by Race/Ethnicity	
Total	618,389
White Alone	37.4%
Black Alone	5.8%
American Indian Alone	1.9%
Asian Alone	6.1%
Pacific Islander Alone	0.1%
Some Other Race Alone	31.3%
Two or More Races	17.3%
Hispanic Origin	57.8%
Diversity Index	85.9

2025 Employed Pop 16+ by Occupation	
Total	277,122
White Collar	50.9%
Management/Business/Financial	12.4%
Professional	20.6%
Sales	7.7%
Administrative Support	10.1%
Services	19.2%



Source: Esri forecasts for 2025 and 2030. U.S. Census 2010 and 2020 Census data converted by Esri into 2020 geography. Consumer Spending data are derived from the 2022 and 2023 Consumer Expenditure Surveys, Bureau of Labor Statistics.

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2025 Employed Pop 16+ by Occupation	12 miles
Total	277,122
Blue Collar	29.9%
Farming/Forestry/Fishing	4.8%
Construction/Extraction	7.1%
Installation/Maintenance/Repair	3.5%
Production	3.8%
Transportation/Material Moving	10.7%

2025 Civilian Population 16+ in Labor Force	
Civilian Population 16+	277,122
Population 16+ Employed	92.6%
Population 16+ Unemployment rate	7.4%
Population 16-24 Employed	13.4%
Population 16-24 Unemployment rate	15.2%
Population 25-54 Employed	62.6%
Population 25-54 Unemployment rate	6.0%
Population 55-64 Employed	13%
Population 55-64 Unemployment rate	5.8%
Population 65+ Employed	4%
Population 65+ Unemployment rate	6.1%

2025 Employed Population 16+ by Industry	
Total	256,548
Agriculture/Mining	9.4%
Construction	8.0%
Manufacturing	4.6%
Wholesale Trade	2.1%
Retail Trade	10.2%
Transportation/Utilities	7.3%
Information	1%
Finance/Insurance/Real Estate	3.6%
Services	47.7%
Public Administration	6.0%



Source: Esri forecasts for 2025 and 2030. U.S. Census 2010 and 2020 Census data converted by Esri into 2020 geography. Consumer Spending data are derived from the 2022 and 2023 Consumer Expenditure Surveys, Bureau of Labor Statistics.

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2025 Consumer Spending	12 miles
Apparel & Services: Total \$	\$429,049,814
Average Spent	\$2,177.20
Spending Potential Index	89
Education: Total \$	\$284,347,452
Average Spent	\$1,442.91
Spending Potential Index	81
Entertainment/Recreation: Total \$	\$686,693,497
Average Spent	\$3,484.60
Spending Potential Index	85
Food at Home: Total \$	\$1,269,726,100
Average Spent	\$6,443.18
Spending Potential Index	87
Food Away from Home: Total \$	\$730,981,655
Average Spent	\$3,709.34
Spending Potential Index	90
Health Care: Total \$	\$1,272,024,273
Average Spent	\$6,454.85
Spending Potential Index	83
HH Furnishings & Equipment: Total \$	\$495,281,709
Average Spent	\$2,513.29
Spending Potential Index	86
Personal Care Products & Services: Total \$	\$181,074,039
Average Spent	\$918.85
Spending Potential Index	88
Shelter: Total \$	\$4,607,743,938
Average Spent	\$23,381.85
Spending Potential Index	88
Support Payments/Gifts in Kind: Total \$	\$566,823,831
Average Spent	\$2,876.33
Spending Potential Index	87



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2025 Consumer Spending	12 miles
Travel: Total \$	\$597,700,249
Average Spent	\$3,033.01
Spending Potential Index	84
Vehicle Maintenance & Repairs: Total \$	\$232,501,561
Average Spent	\$1,179.82
Spending Potential Index	87

Top Tapestry Segment

12 miles

Shared Roots (G1):

This segment is characterized by large multigenerational households in the South and West.

[Learn more about this segment...](#)

Data Note: Household population includes persons not residing in group quarters. Average Household Size is the household population divided by total households. Persons in families include the householder and persons related to the householder by birth, marriage, or adoption. Per Capita Income represents the income received by all persons aged 15 years and over divided by the total population.

Income represents the preceding year, expressed in current dollars. Household income includes wage and salary earnings, interest dividends, net rents, pensions, SSI and welfare payments, child support, and alimony.

Persons of Hispanic Origin may be of any race. The Diversity Index measures the probability that two people from the same area will be from different race/ethnic groups.

Consumer spending shows the amount spent on a variety of goods and services by households that reside in the area. Expenditures are shown by broad budget categories that are not mutually exclusive. Consumer spending does not equal business revenue. Total and Average Amount Spent Per Household represent annual figures. The Spending Potential Index represents the amount spent in the area relative to a national average of 100.

 **Source:** Esri forecasts for 2025 and 2030. U.S. Census 2010 and 2020 Census data converted by Esri into 2020 geography. Consumer Spending data are derived from the 2022 and 2023 Consumer Expenditure Surveys, Bureau of Labor Statistics.

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