

TOWN OF APPLE VALLEY
VILLAGE SPECIFIC PLAN
EXISTING CONDITIONS REPORT



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1. INTRODUCTION

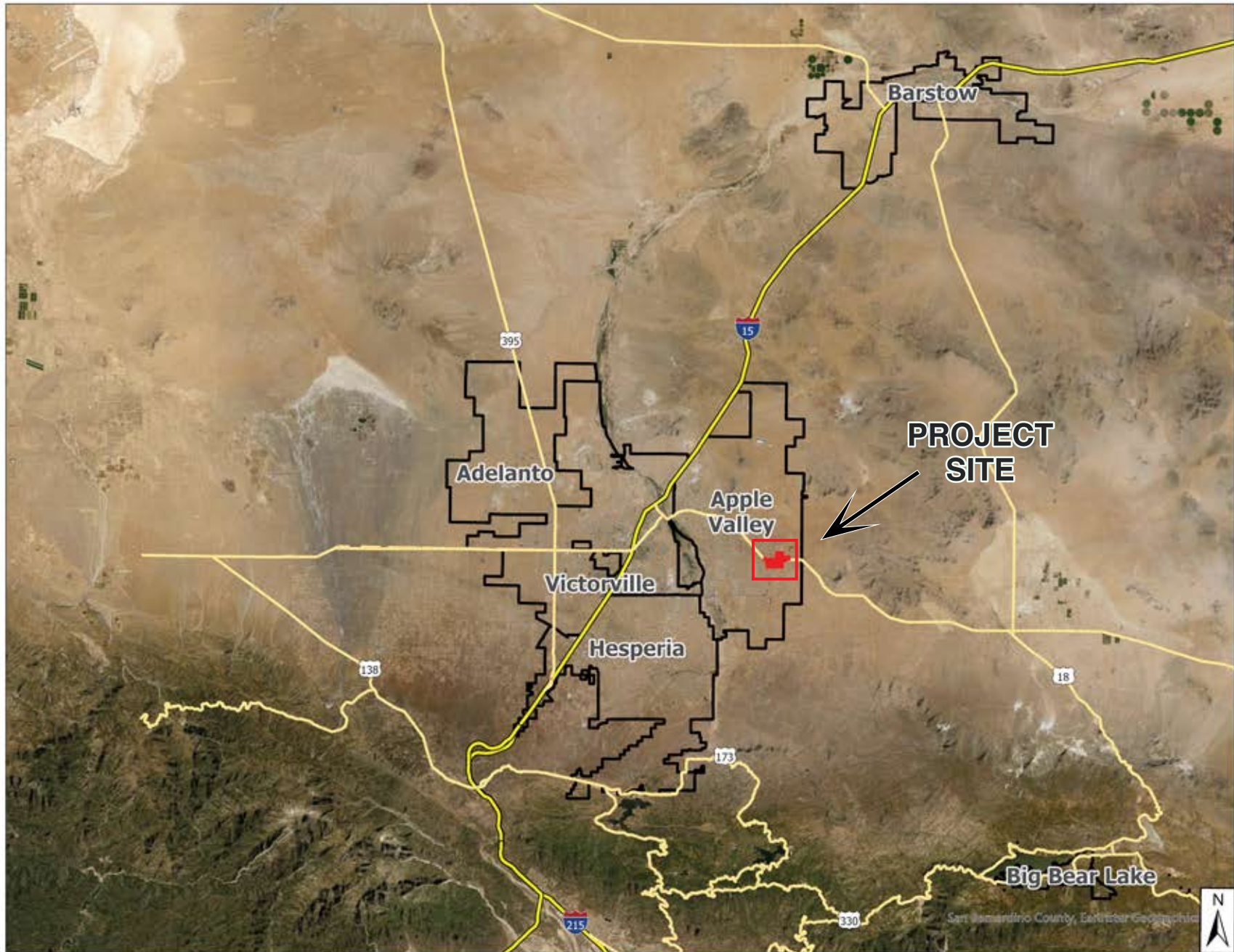
1.A Project Description and Purpose

The Village Specific Plan area is centered around a 1.5-mile segment of Highway 18 in the Town of Apple Valley. It includes retail and service-oriented businesses, mobile home parks and multi-family dwelling units, and several public facilities and open spaces, including a community center, gymnasium, and park. It also includes the historic Village, which was once the Town's primary commercial hub. The Village generally extends along Highway 18 between Navajo and Central Roads. Many of the original post-World War II buildings are currently occupied by businesses that formed a Property Business Improvement District (PBID) in 2007 to provide amenities and expand marketing efforts in the area. The PBID has completed a number of projects since its inception, and continues to work toward improvements in the area. One of the PBID's and the Town's goals has been the preparation of a master plan that would set the stage for the long-term development and redevelopment of the Village; set the tone for the quality of development that is desired and expected; and provide flexible and creative development standards and guidelines to assure the economic health of the Village. A Specific Plan is being prepared to meet these goals, and to improve vehicular and multimodal access and safety along Highway 18 and throughout the Village area.

This Existing Conditions report describes the current physical conditions and development context in the Village Specific Plan area. The analysis serves as a baseline upon which the Village Specific Plan recommendations, guidelines, and policies will be built. Current conditions are indicative of policies that have been implemented in the past, and evaluation of current challenges, deficiencies, and opportunities is an important part of creating an effective, cohesive vision and plan for future development in the Specific Plan area.

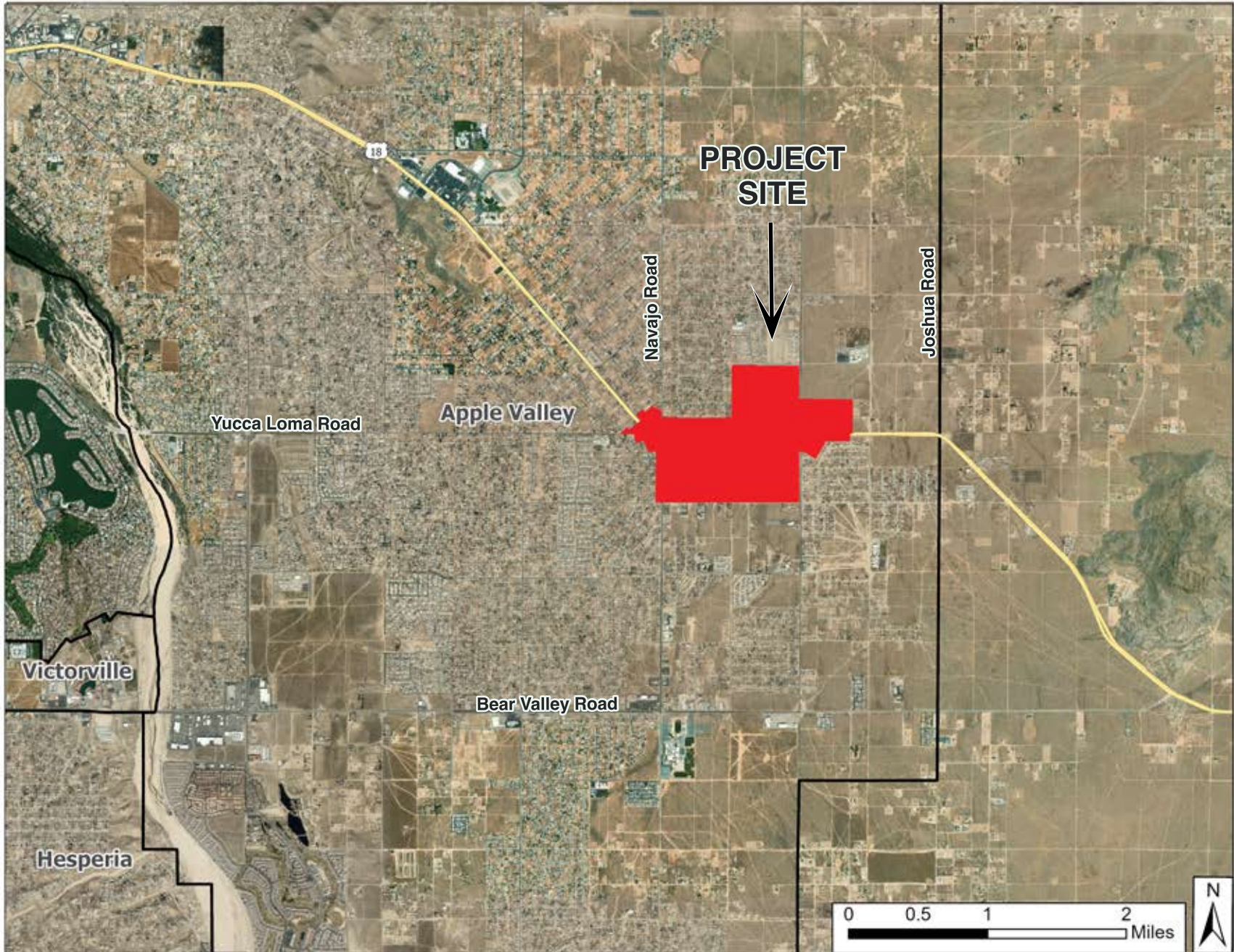
1.B Project Location

The Village Specific Plan area is located in the east-central portion of the Town of Apple Valley along State Highway 18, one of the principal transportation corridors in the Victor Valley region of San Bernardino County. It includes 651.2± acres generally bounded by Arapahoe and Esaws Avenues on the north, Ottawa Road on the south, Central Road on the east, and the realigned Yucca Loma and Navajo Road on the west. Additional contiguous parcels on the east and west are also included. Project location and boundaries are shown in Exhibits 1, 2, and 3.



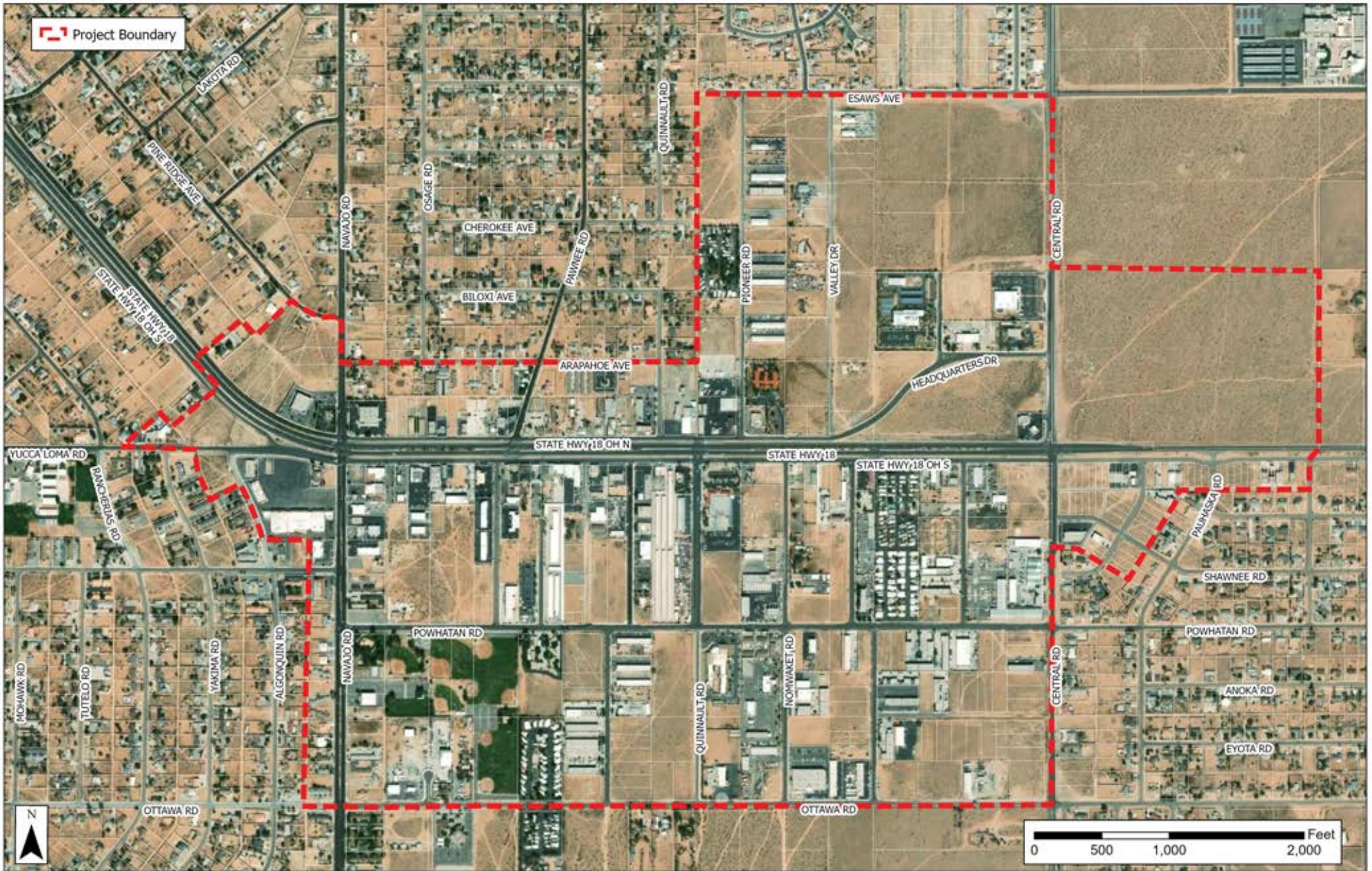
Source: Terra Nova Planning and Research, Inc.; ESRI, 2021

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Source: Terra Nova Planning and Research, Inc.; ESRI, 2021

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Source: Google Earth, 2021

9.7.21

2. LAND USE

2.A Existing Land Uses

Highway 18 Frontage

The Highway 18 corridor within the Village Specific Plan area stretches approximately 1.5 miles and is one of Apple Valley's principal commercial centers. Current land uses include the following:

Commercial: The Highway 18 frontage contains a mix of restaurant, retail, and service commercial establishments. Among the retailers are local-serving gas stations, personal and professional services, feed and seed supplies, furniture stores, antique dealers, thrift shops, auto parts stores, and pharmacies. Services include banks, beauty salons, plumbing companies, real estate agencies, dental practices, and architecture and law firms. Commercial development on the north side of the Highway is more extensive than on the south side, in part due to deeper lot configurations.

Residential: The Apple Valley Mobile Home Lodge is located on the south side of Highway 18, east of Hitt Road.

Nearly all buildings along the Highway 18 frontage are single-story structures. Many are free-standing units built in the post-World War II era with their own separate access points and parking lots. Some in the southwesterly portion of the corridor were more recently constructed with an inline retail configuration with shared centralized access, parking, and landscaping. The north side of Highway 18 at Navajo Road contains a newer drive-thru fast food restaurant and two pharmacies. Throughout the corridor, some buildings are vacant or appear to have been abandoned, including a partially occupied shopping center at the southwest corner of Highway 18 and Navajo Road.

North of Highway 18

Lands north of the Highway 18 commercial core are still largely undeveloped. Land uses north of the Highway 18 frontage include a mixture of service commercial, residential, and public and quasi-public facilities.

Service Commercial: Along Pioneer Road are light industrial warehouse style buildings containing wood shops, towing companies, self-storage units, and similar land uses.

Residential: The Pioneer Mobile Home Park is on the west side of Pioneer Road. Casa Colina, a long-term residential treatment facility for individuals with brain injuries, is on the east side of Pioneer Road, one parcel north of the Highway 18 frontage. Multi-family (and a few single-family) dwelling units are located on the south side of Arapahoe Avenue.

Public and Quasi-Public Facilities: Near the intersection of Central Road and Headquarters Drive are newer facilities of the Mojave Water Agency and Fire Station No. 1. B.E.S.T. Opportunities, Inc. which provides services for developmentally disabled adults, is also located in this area.

South of Highway 18

South of the Highway 18 frontage, the Specific Plan area includes more broadly developed service commercial, residential, and community facilities.

Service Commercial: Service commercial warehouse style buildings consisting of self-storage, auto salvage, metal works, tool and machinery workshops, vehicle storage and work yards, and similar services are located throughout the southern portion of the Specific Plan area. Liberty Utilities offices and vehicle maintenance is located along Ottawa Road.

Residential: Multi-family (and a few single-family) residences are along Navajo Road and further east on Powhatan Road. Apple Valley Mobile Home Lodge is located on and south of Highway 18, and Apple Valley Ranchos Mobile Home Park is on Ottawa Road.

Community Facilities: The James A. Woody Community Center, James A. Woody Park, and Michael Martin Gymnasium are on Navajo Road south of Powhatan Road. The Apple Valley Municipal Animal Shelter, at the northeast corner of Quinnault and Powhatan Roads, was built in 2010 and is one of the few two-story structures in the Specific Plan area. The Apple Valley Corporate Yard and Household Hazardous Waste (HHW) facility are at 13450 Nomwaket Road. A post office is at Highway 18 and Quinnault Road. Offices and facilities of Liberty Utilities are on Ottawa Road in the southwest corner of the planning area.

Vacant Land

The Specific Plan area contains 274± acres of vacant land. Vacant parcels are scattered throughout the area, with the largest vacant parcels generally north of Highway 18 and east of Valley Drive. Additional vacant parcels are clustered along the Highway 18 corridor west of Navajo Road, and along Powhatan and Ottawa Roads in the southern Specific Plan area.

2.B General Plan Designations

The Apple Valley General Plan (2009) Land Use Element establishes land use designations for all parcels in the Town. Seven (7) General Plan designations are assigned in the Specific Plan area, as described in the following table and shown on Exhibit 4. Table 1 provides the General Plan's descriptions for each of the land use categories that occur within the Specific Plan area.

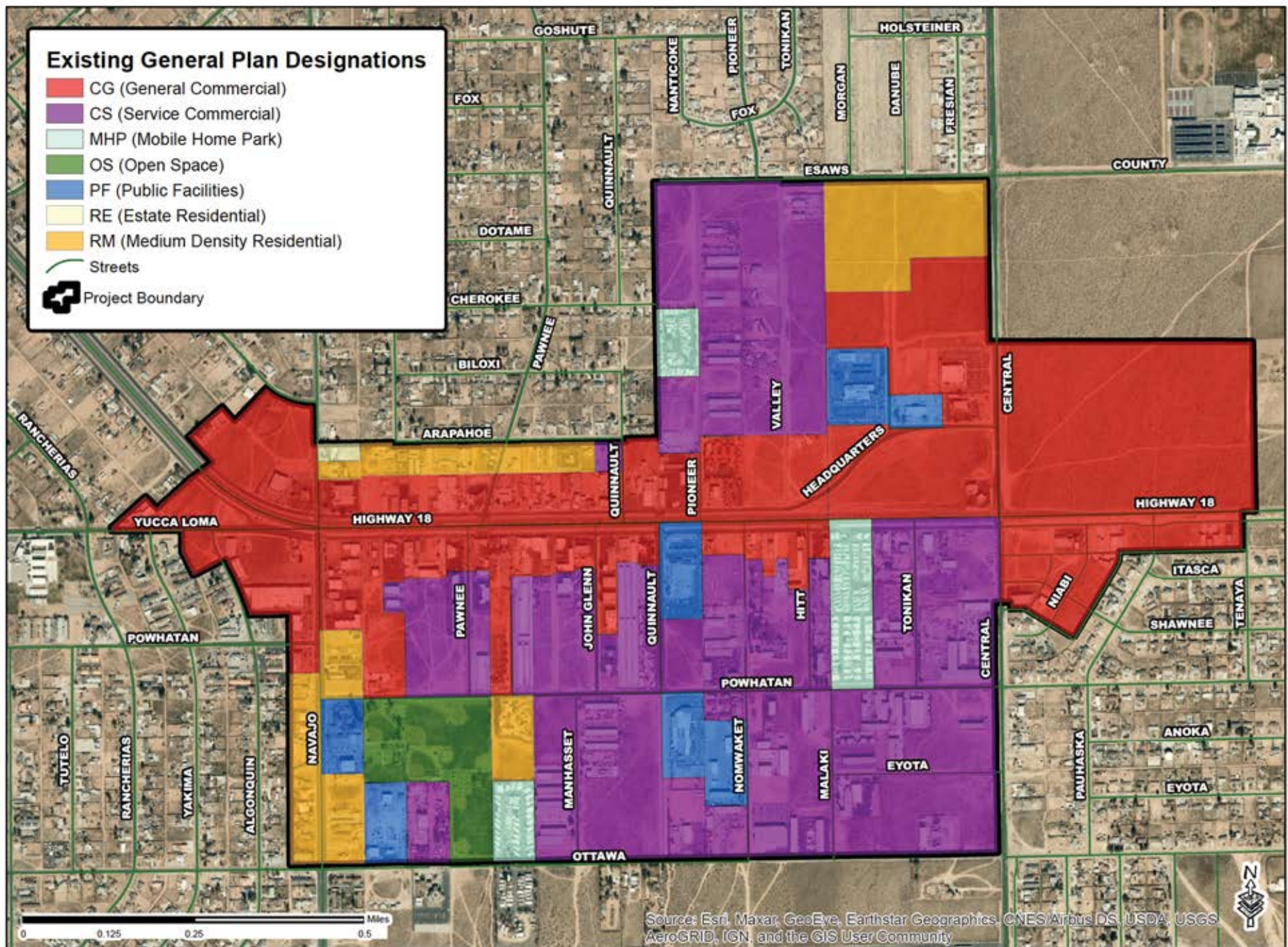
Table 1
General Plan Designations

General Plan Designation	Purpose
Residential	
Mobile Home Park (MHP, 5-15 du/ac)	Applies to mobile home parks and mobile home subdivisions.
Medium Density Residential (R-M, 4-20 du/ac)	Promotes a wide range of higher density residential units, including single-family attached and multi-family units such as condominiums, townhomes, and apartments. Projects restricted to senior citizens and providing various levels of care are also appropriate. Should be a buffer between less intense residential designations and commercial or industrial designations, or major roadways.
Estate Residential (R-E, 1 du/1 to 2.5 gross ac)	Allows detached single-family detached homes on 1 to 2.5 gross acres. Access on local roads in new subdivisions should be paved. Multi-use trails should be integrated into all new projects, as appropriate. Animal-keeping for personal use, ranching activities, and home occupations are appropriate. May be appropriate for bed and breakfast and similar use, with approval of a conditional use permit.
Commercial	
General Commercial (C-G)	Allows a broad range of retail uses, as well as office and service land uses. Typical uses serve the needs of residents and businesses in a shopping center setting. General retail stores, including all types of consumer goods, furniture and appliance sales, auto repair, and sales are permitted. Restaurants, both sit-down and fast food, gasoline services, and general office (secondary or retail uses) are permitted. There is no minimum size for project sites, but assemblage of smaller parcels is encouraged.
Service Commercial (C-S)	Assigned to lands in The Village. Intended to serve as a transition designation allowing commercial and industrial land uses on a smaller scale. Necessitates flexibility in development standards due to existing development and infrastructure constraints. Land uses include vehicle sales and service; lumber, home repair and building supply; general retail; warehousing; manufacturing uses completely contained within an enclosed structure. There is no minimum size for project sites, but assemblage of smaller parcels is encouraged.

Table 1
General Plan Designations

General Plan Designation	Purpose
Other	
Public Facilities (P-F)	Assigned to public and quasi-public land uses, including Town Hall and other Town facilities; fire stations; schools; facilities of the County, State, and federal government; water and sewer district; and utility substations and facilities. There is no minimum size.
Open Space (O-S)	Applied to natural and active open space areas, including lands owned by Town, County, State, and federal agencies for the purposes of recreation or conservation, and golf courses, parks, or other recreational facilities.

Source: Apple Valley General Plan 2009.



Source: Terra Nova Planning and Research, Inc.; ESRI, 2021

9.7.21

The following table provides a breakdown of acreage in the Specific Plan area by General Plan designation. As shown, 439.7 acres (68% of the Specific Plan area) are designated for commercial uses, which are roughly equally divided between General Commercial (214.4 acres) and Service Commercial (225.3 acres) designations. Approximately 68.7 acres (11%) are designated for residential uses, 29.1 acres (4%) are designated for public facilities, and 18.8 acres (3%) are designated for open space.

Approximately 58% of the Specific Plan area is developed. The largest amount of developed land is designated as Service Commercial (107.0 acres), followed by General Commercial (84.2 acres) and Public Facilities (29.1 acres). The Specific Plan area includes an estimated 288 dwelling units, 62% of which are mobile homes. It also includes approximately 1,637,674 square feet of commercial square footage and 185,706 square feet of public facility buildings.

Approximately 42% of the Specific Plan area is undeveloped. The largest amount of vacant land is designated General Commercial (130.2 acres), followed by Service Commercial (118.4 acres) and Medium Density Residential (25.0 acres).

Table 2
Existing Land Uses by General Plan Designation

General Plan Designation	Developed Acres	Vacant Acres	Total Acres	Existing Dwelling Units ¹
Residential				
Mobile Home Park (MHP, 5-15 du/ac)	17.5	0.0	17.5	173
Medium Density Residential (R-M, 4-20 du/ac)	25.2	25.0	50.2	114
Estate Residential (R-E, 1 du/1 to 2.5 gross ac)	1.0	0.0	1.0	1
Subtotal:	43.7	25.0	68.7	275
Commercial				Existing Sq. Ft. ²
General Commercial (C-G)	84.2	130.2	214.4	662,098
Service Commercial (C-S)	107.0	118.4	225.3	975,576
Subtotal:	191.2	248.6	439.7	1,637,674
Other				
Public Facilities (P-F)	29.1	0.0	29.1	185,706
Open Space (O-S)	18.8	0.0	18.8	---
Subtotal:	47.9	0.0	47.9	185,706
Land Use Total:	282.8	273.6	556.3	
Street Right-of-Way Total:	94.8	0.0	94.8	
TOTAL:	377.6	273.6	651.2	1,823,380

¹ estimate based on Google Earth

² estimate based on Microsoft Maps US Building Footprints dataset

Source: Apple Valley General Plan GIS database

2.C Zoning Designations

The Apple Valley Development Code establishes zoning designations and development standards for the Town. Eight (8) zoning designations are assigned within the Specific Plan area, as described in the following table and shown in Exhibit 5.

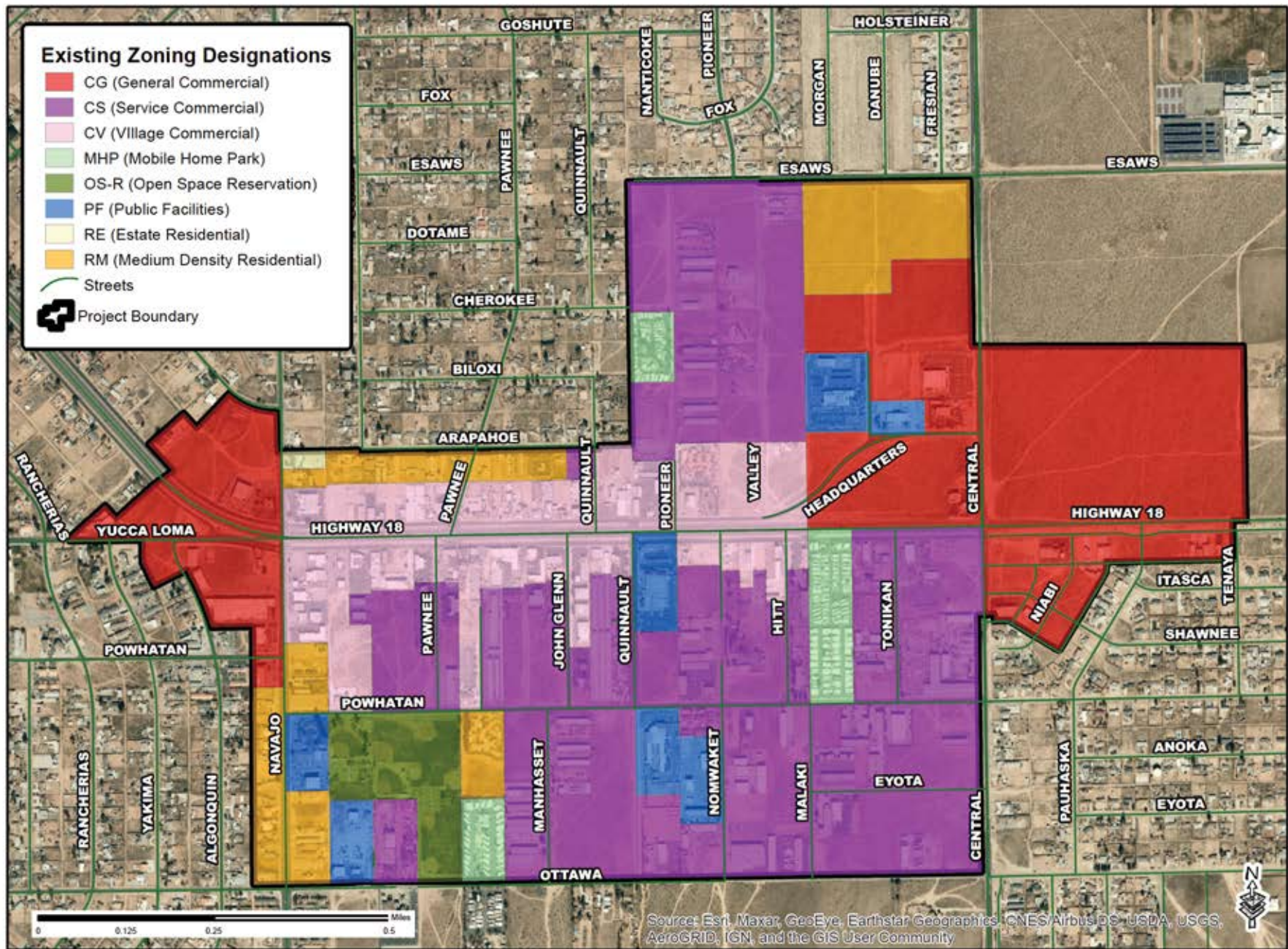
Table 3
Zoning Designations

Zoning Designation	Purpose
Residential	
Mobile Home Park (MHP, 5-15 du/ac)	Applies to mobile home parks that existed upon completion of the General Plan. New mobile home parks require a change of zone to assign this designation to a project.
Multi-Family Residential (R-M, 4-20 du/ac)	Provides an area for higher density housing types, including single-family attached and multi-family homes such as duplexes, condominiums, townhouses, apartments, and senior housing developments.
Estate Residential (R-E, 1 du/1 to 2.5 gross ac)	Provides for single-family residential subdivisions with a rural atmosphere and the opportunity for custom homes which will allow equestrian uses and animal keeping. Must be served by infrastructure and utilities.
Commercial	
General Commercial (C-G)	Intended for the development of a full range of retail stores, offices, and personal and business services, including shopping centers along major highways. A maximum floor area ratio (F.A.R.) of 0.5 is permitted.
Service Commercial (C-S)	Intended to provide an area in which certain light industrial uses may be combined with those commercial activities which are frequently not compatible with conventional retail, service, and office uses. A maximum floor area ratio (F.A.R.) of 0.5 is permitted.
Village Commercial (C-V)	Intended as a vehicle for the revitalization of the "Village." A variety of uses including, but not limited to, food service, office, auto, truck and recreation vehicle sales and service, lumber yards, home repair and building supplies, discount and wholesale sales and light manufacturing are permitted, consistent with the goals, policies, and objectives of the General Plan. A maximum floor area ratio (F.A.R.) of 0.5 is permitted.
Other	
Public Facilities (P-F)	Intended to protect the public health, safety, and welfare by establishing regulations for public services and providing safe, reliable and efficient public services and facilities. Generally contains buildings, infrastructure, resources, or facilities that are significant assets to the community, or are essential in establishing and maintaining services within the Town.

Table 3
Zoning Designations

Zoning Designation	Purpose
Open Space - Recreation (OS-R)	Intended for privately owned lands that provide a range of active recreational opportunities within the community. These active recreational opportunities are meant to serve the recreational and social interaction needs of Town residents of all ages, economic situations, and physical conditions. A limited number of publicly owned lands may also be included subject to the approval of the Town Council.

Source: Apple Valley Development Code.



The following table describes acreage in the Specific Plan area by zoning designation. The zoning designations are generally aligned with the General Plan designations described in Section 2.B. Consistent with the General Plan, 439.7 acres (68% of the Specific Plan area) are zoned for commercial uses. Approximately 68.7 acres (11%) are zoned for residential uses, 29.1 acres (4%) are zoned for public facilities, and 18.8 acres (3%) are zoned for open space.

The only notable difference is that lands designated C-G in the General Plan are separated into two zoning designations: General Commercial (C-G) and Village Commercial (C-V). C-V is assigned to commercial lands within the boundaries of The Village, along Highway 18 between Navajo Road on the west and the Apple Valley Mobile Homes Lodge on the east. C-G is assigned to commercial lands outside of The Village, generally along Highway 18 west of Navajo Road, along the north side of Highway 18 east of Apple Valley Mobile Homes Lodge, and along the south side of Highway 18 east of Central Road.

Table 4
Existing Land Uses by Zoning Designation

Zoning Designation	Developed Acres	Vacant Acres	Total Acres	Existing Dwelling Units ¹
Residential				
Mobile Home Park (MHP, 5-15 du/ac)	17.5	0.0	17.5	173
Multi-Family Residential (R-M, 4-20 du/ac)	25.2	25.0	50.2	114
Estate Residential (R-E, 1 du/1 to 2.5 gross ac)	1.0	0.0	1.0	1
Subtotal:	43.7	25.0	68.7	288
Commercial				Existing Sq. Ft. ²
General Commercial (C-G)	38.1	115.3	144.4	240,981
Service Commercial (C-S)	107.0	118.3	225.3	975,576
Village Commercial (C-V)	55.1	14.9	70.0	421,117
Subtotal:	190.8	248.9	439.7	1,637,674
Other				
Public Facilities (P-F)	29.1	0.0	29.1	185,706
Open Space - Recreation (OS-R)	18.8	0.0	18.8	---
Subtotal:	47.9	0.0	47.9	185,706
Land Use Total:	282.8	273.6	556.3	
Street Right-of-Way Total:	94.8	0.0	94.8	
TOTAL:	377.6	273.6	651.2	---

¹ estimate based on Google Earth

² estimate based on Microsoft Maps US Building Footprints dataset

Source: Apple Valley Zoning Code GIS database

3. INFRASTRUCTURE

3.A Circulation

The Town's circulation network is governed by several plans and regulatory documents, including the General Plan Circulation Element, Municipal Code, Town engineering standards and Caltrans Highway Design Manual (sixth edition). Characteristics of circulation features in the Village Specific Plan area are described below.

Streets

State Highway 18 (Happy Trails Highway) extends east-west through the Specific Plan area and bisects and is the backbone of the Village Specific Plan area. It connects the Village with Victorville and Interstate-15 on the west and Lucerne Valley, the Big Bear area, and the Morongo Basin on the east. Other key east-west trending streets in the Specific Plan area include Powhatan Road, Ottawa Road, and Headquarters Drive. East-west access north of Highway 18 is limited by existing development patterns, with Arapahoe being the primary east-west alternative, only in the western half of the Specific Plan Area.

Key north-south trending streets include Navajo Road, Quinnault Road, Pioneer Road, Valley Drive and Central Road. At the western edge of the Specific Plan area, the realignment of Yucca Loma will provide an additional north-south connection across Highway 18.

Highway 18 is operated and maintained by Caltrans, and all other streets are owned and maintained by the Town.

The most recent traffic volumes and capacities for major roadway segments within the Specific Plan area, as reported in the 2009 Apple Valley General Plan, are summarized below. As shown, all segments operate under "acceptable" conditions.

Table 5
Existing Roadway Segment Capacity and Volume

Roadway Segment	Roadway Capacity	Existing Daily Traffic	Volume/ Capacity Ratio	Threshold
SR-18 between Navajo Road & Central Road	40,500	11,700	0.29	Acceptable
Navajo Road between Thunderbird Rd. & SR-18	12,700	4,100	0.32	Acceptable
Navajo Road between SR-18 & Nisqually Road	40,500	15,100	0.37	Acceptable
Central Road between Thunderbird Rd. & SR-18	12,700	5,600	0.44	Acceptable
Central Road between SR-18 & Nisqually Road	12,700	5,900	0.46	Acceptable

Source: Apple Valley General Plan 2009, Table II-7.

The Town’s General Plan establishes a street classification system based on cross sections and the layout and widths of right-of-way features, such as bike lanes, landscaped medians, on-street parking, and sidewalks. Street classifications have important ramifications on the functional capacity of a street and can influence the aesthetic, economic, and safety outcomes of surrounding lands. Street classifications and cross sections in the Specific Plan area are shown in Exhibits 6 and 7 and summarized in the following table.

Table 6
General Plan Street Classifications in the Specific Plan Area

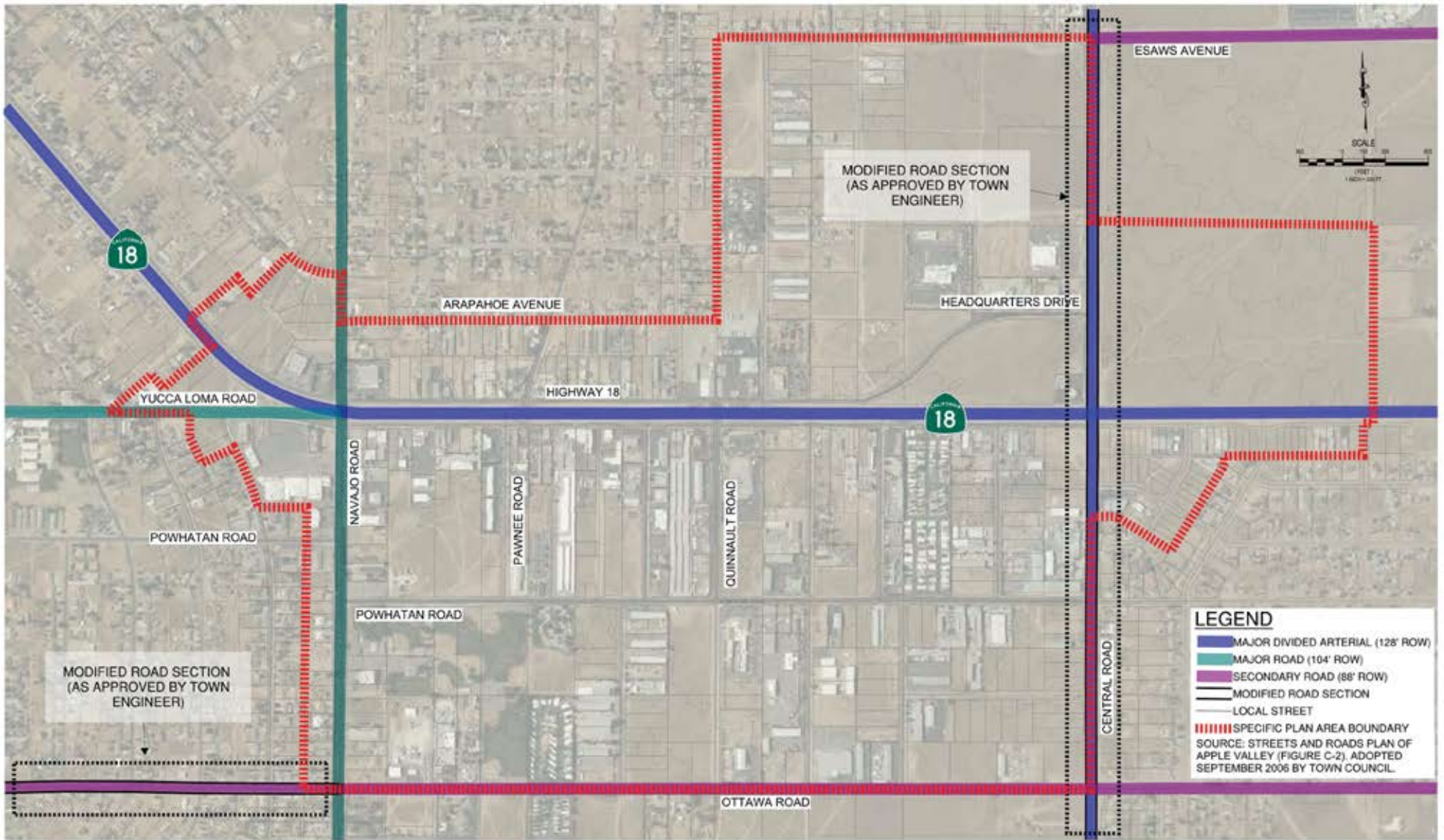
Street Classification	Road
Major Divided Highway: <ul style="list-style-type: none"> ○ 128 ft right-of-way ○ 6 traffic lanes ○ two 8-10-ft bike or parking lanes ○ 12 ft median ○ 6 ft landscaped parkway ○ 6 ft sidewalk 	State Highway 18 Central Road*
Major Road: <ul style="list-style-type: none"> ○ 104 ft right-of-way ○ 4 traffic lanes ○ two 8-10 ft bike or parking lanes ○ 12 ft median ○ 6 ft landscaped parkway ○ 6 ft sidewalk 	Navajo Road Yucca Loma Road
Secondary Road: <ul style="list-style-type: none"> ○ 88 ft right-of-way ○ 4 travel lanes ○ two 8 ft bike lanes ○ 6 ft landscaped parkway ○ 6 ft sidewalk 	Ottawa Road
Local Commercial Street: <ul style="list-style-type: none"> ○ 66 ft right-of-way ○ 2 travel lanes 	all other streets

* designated as having a modified road section requiring approval of the Town Engineer, allows for a narrower right-of-way than the standard Major Divided Highway.

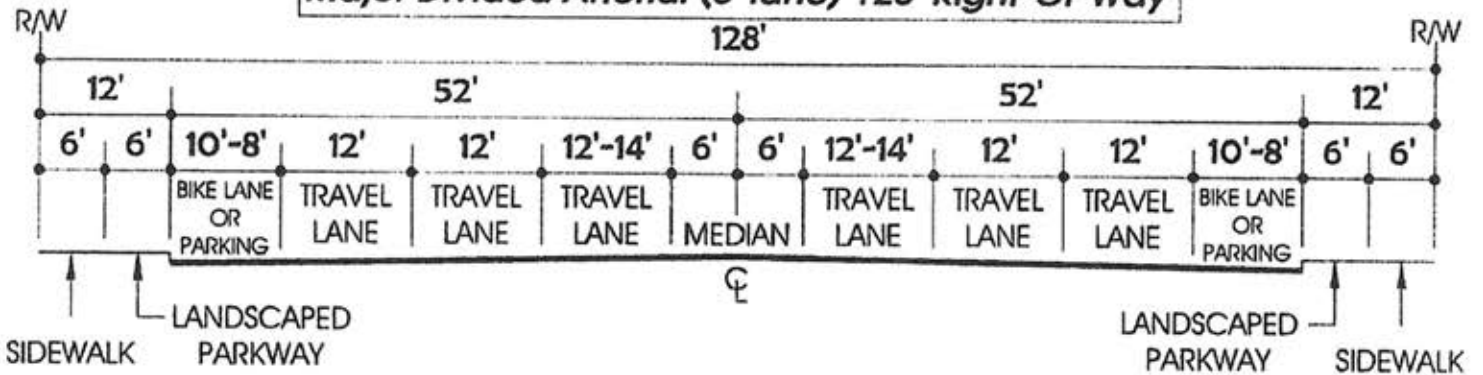
Highway 18 consists of a central 4-lane divided arterial with two 2-way frontage roads known as Outer Highway 18-North and Outer Highway 18-South. The entire right-of-way is ±200-feet wide. The frontage roads are intended to separate high-speed through traffic from local traffic accessing adjacent businesses, parking lots, and other land uses. However, they also present challenges, including complex and inefficient intersections with multiple approaches, long intersection crossing distances for pedestrians crossing Highway 18, and access barriers to pedestrians, bicyclists, and the disabled. The frontage roads also limit accessibility to local businesses by through traffic which might otherwise stop if such a stop was perceived to be a simple driving maneuver. The challenges caused by the complexities of Highway 18 have led to studies and proposals for corridor-wide improvements and alternative concepts (see "Village State Route-18 Corridor Enhancement Plan" below).

As noted in Table 5, Central Road is designated as a Major Divided Highway with a 128-foot right-of-way. Between Esaws Avenue and Ottawa Road, Central Avenue's cross-section can be modified, with approval by the Town Engineer, because of a lack of available right-of-way, which ranges from 100 to 110 feet. This deficiency will impact the Town's ability to provide all of the components of a complete street, such as bike lanes, sidewalks, parking or a median, in order to fit the roadway within the narrowed right of way.

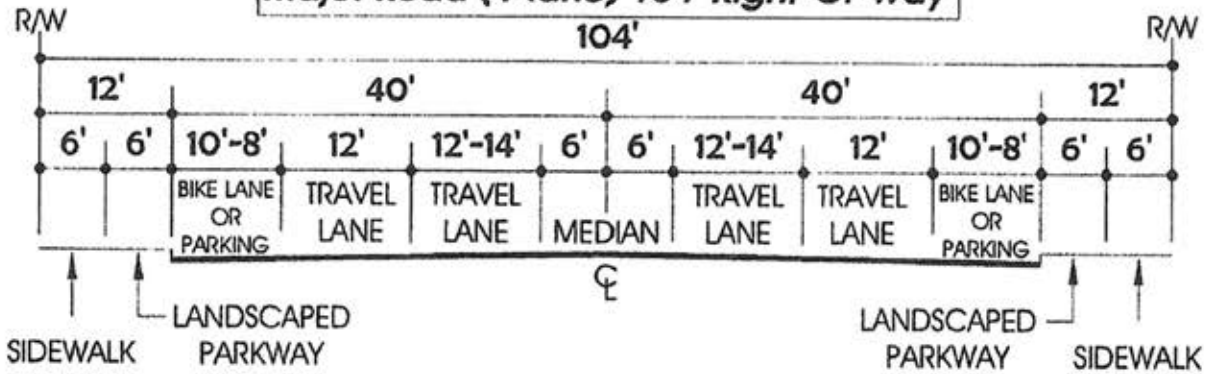
With the exception of Highway 18, General Plan designated roads within the Specific Plan are not built out to their ultimate right-of-way and do not include complete improvements. Generally, the Town's practice has been to require roadway improvements with new development in recent years. However, development which occurred prior to these requirements may not have dedicated right-of-way, or provided half-width curb, gutter, sidewalk or bike lanes. Please see "Pedestrian Facilities," below. The build out of the Village will require consideration of how to connect incomplete facilities throughout the area.



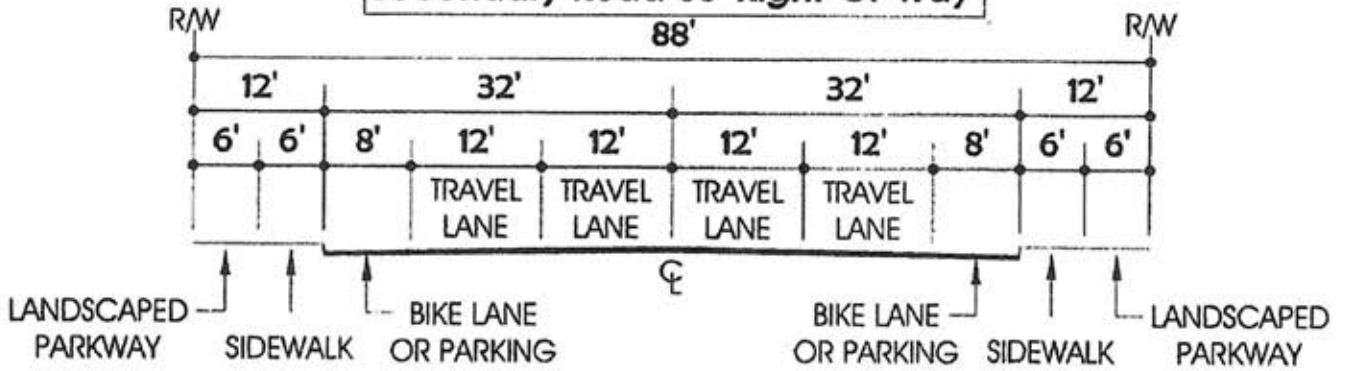
Major Divided Arterial (6-lane) 128' Right-Of-Way



Major Road (4-lane) 104' Right-Of-Way



Secondary Road 88' Right-Of-Way



Intersections

The Specific Plan area includes five (5) existing signalized intersections:

- Highway 18 @ Navajo Road
- Highway 18 @ Quinnault Road
- Highway 18 @ Central Road
- Navajo Road @ (easterly extension of) Powhatan Road
- Central Road @ Esaws Avenue

Other intersections are controlled by stop signs.

Traffic Safety

Between 2009 and 2019, there were 14 collisions within the Specific Plan area that resulted in fatalities or severe injuries.¹ Six (6) of them resulted in fatalities and 8 resulted in severe injuries. There were a total of 25 victims in these 14 collisions, of which 6 were killed, 10 were severely injured, and nine suffered minor injuries. The collisions occurred primarily at or near intersections along the Navajo Road and Central Road corridors. There were no collisions involving severe injury or a fatality on Highway 18 between Navajo Road and Central Road. The vast majority of accidents occurred away from signalized intersections, either mid-block or at stop-controlled intersections.

The primary causes of accidents were failure of drivers to yield the right-of-way (38% of accidents), driving under the influence (15%), and pedestrian violations (15%). All of the collisions involving pedestrians were associated with pedestrians crossing outside of crosswalks.

Parking

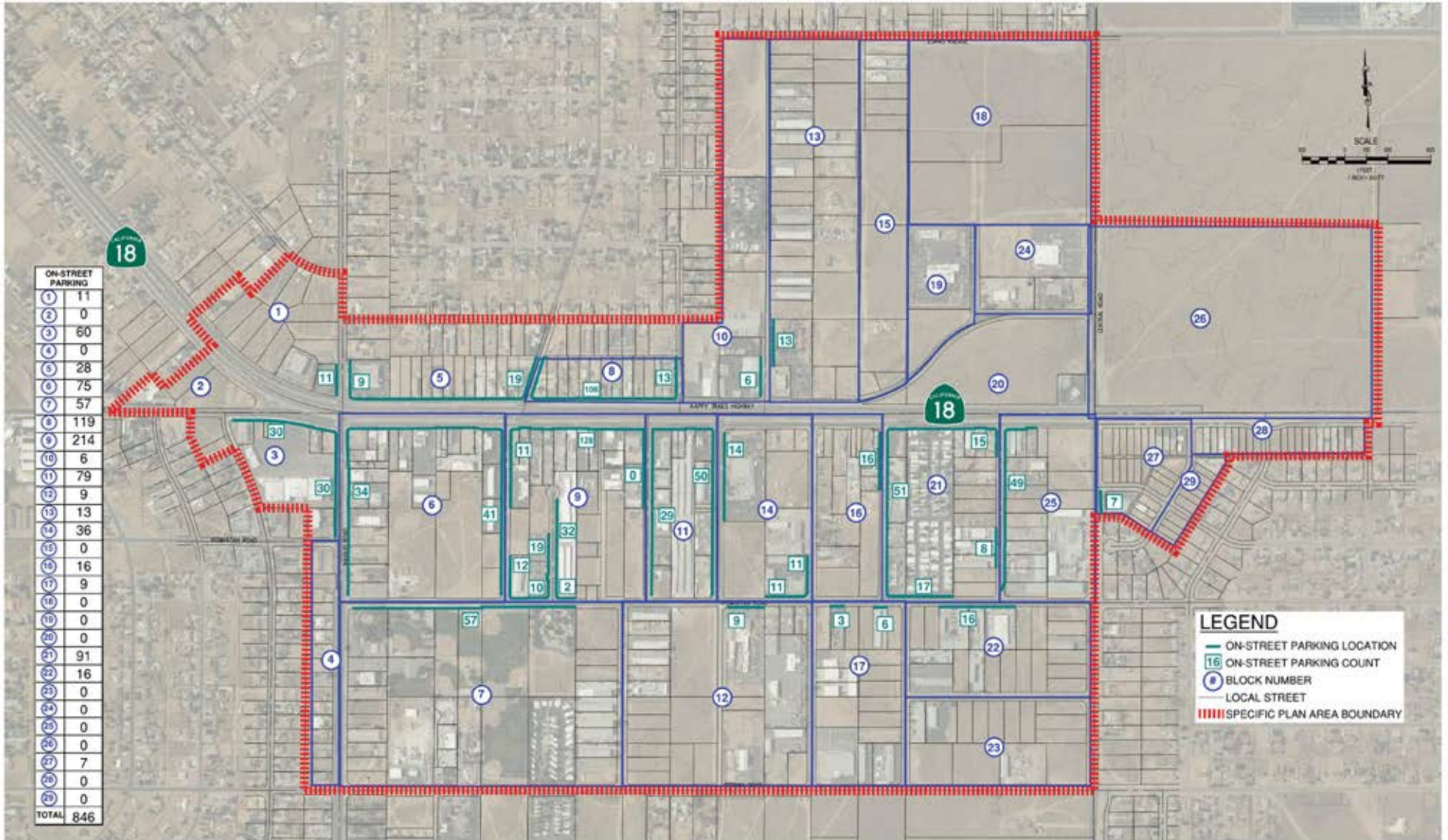
Parking within the Specific Plan area includes public on-street and private off-street parking. The analysis of on- and off-street parking completed for this report is depicted on Exhibit 8 and Exhibit 9, respectively.

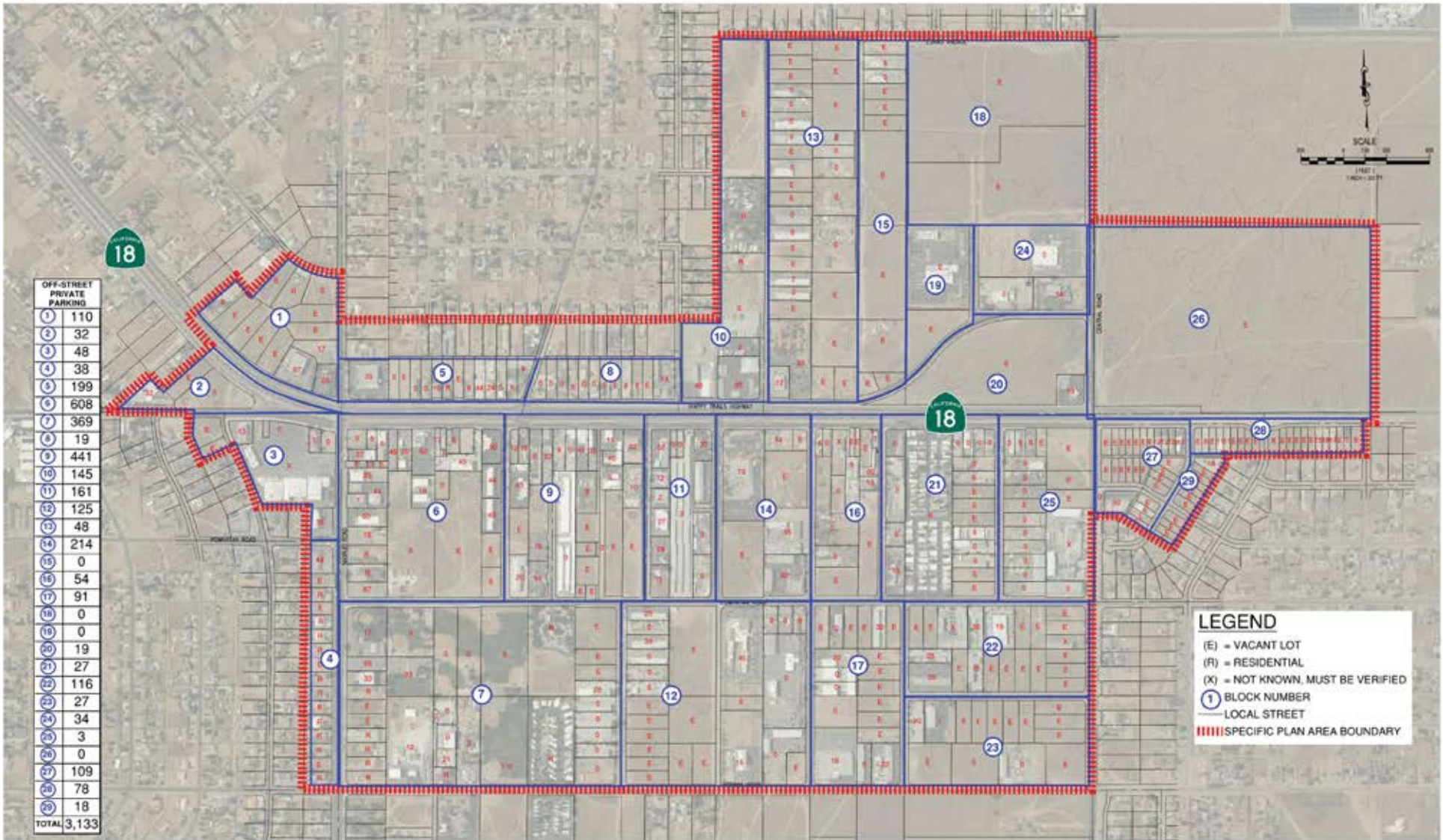
Public On-Street Parking is currently free and generally unrestricted with regard to time limits, permit parking, or metered parking. Based on the length of existing curbed segments on improved streets in the Specific Plan area, there are currently an estimated 846 on-street parking spaces. Potential supply is much higher given that additional on-street parking could be accommodated on unimproved streets and where future development or redevelopment improves street frontages. For purposes of this analysis, only parking in areas where the street is finished, and provides a curb against which to park, was counted.

¹ Village Specific Plan Existing Conditions Report – Circulation and Parking,” David Evans and Associates, Inc., April, 2021

Private Off-Street Parking: is used by a property's owners, residents, or customers. Parking facilities are generally separate parking lots on each parcel, each with its own driveway(s), although some commercial shopping centers have larger shared parking lots. In some cases, parking is limited to narrow areas between the street right-of-way and store front, with little to no room for vehicle maneuvering or stacking. There are an estimated 3,133 marked parking spaces (including disabled spaces) in paved off-street parking lots in the Specific Plan area.

Title 9 of the Town's Development Code establishes requirements and design guidelines for off-street parking and loading, and includes provisions for shared parking, off-site or remote parking, and valet parking.





Pedestrian Facilities

The sidewalk network provides pedestrian access and connectivity to surrounding land uses. Exhibit 10 identifies existing sidewalks in the Specific Plan area. As shown, there are many gaps in the sidewalk system. Discontinuous sidewalk systems can pose safety and accessibility concerns and discourage active transportation. Reasons for gaps in the Specific Plan area include:

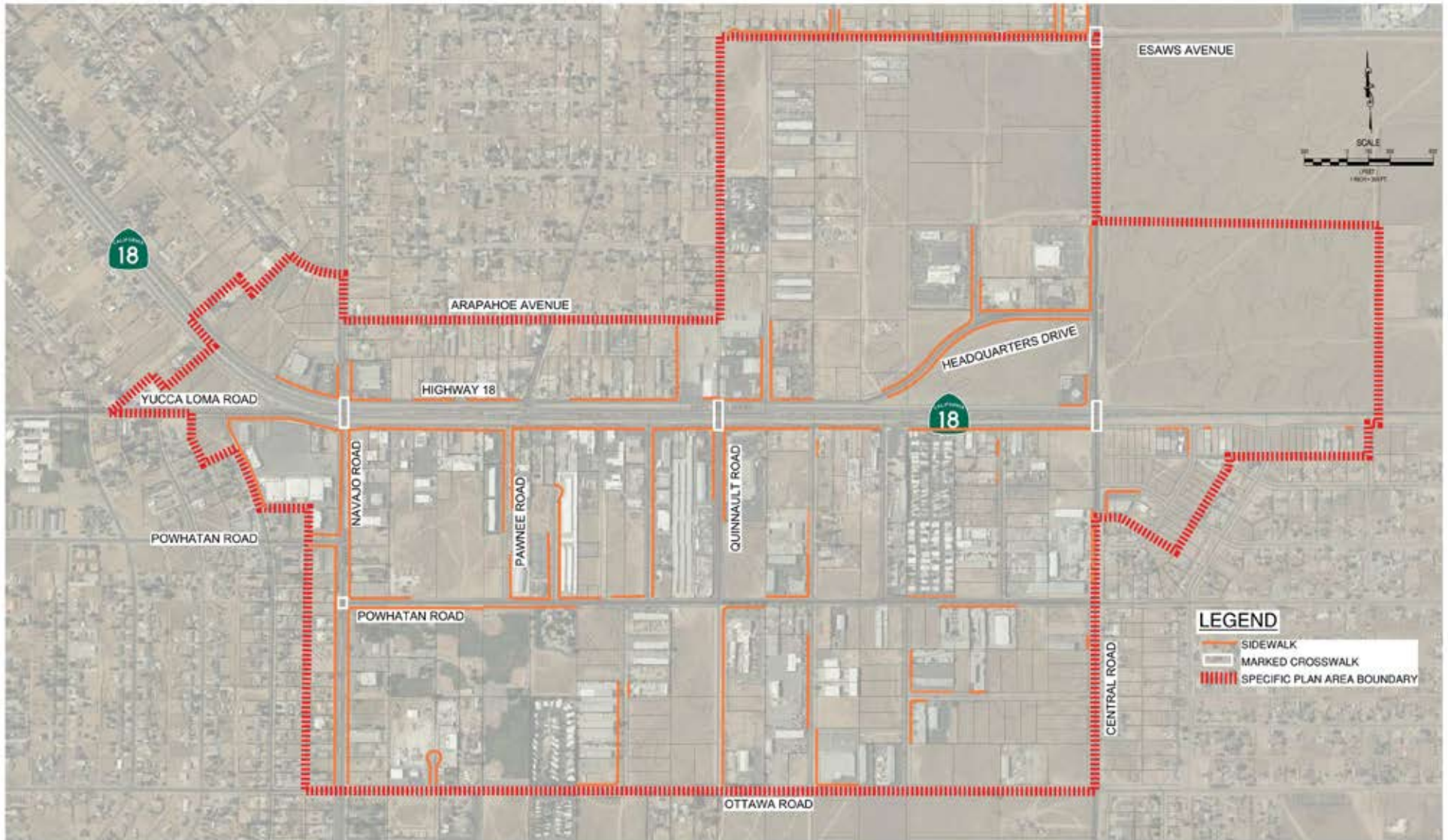
- Vacant lots:
Once developed, the property owner is usually responsible for constructing and connecting sidewalks on the street frontage, consistent with current standards at the time of development.
- Older commercial and industrial developments:
Development built before the Town's incorporation in 1988 may have been subject to the County's rural development codes and not required to construct sidewalks.
- Older residential neighborhoods:
Older streets may have been subject to standards for rural subdivisions that called for unimproved streets without curbs, gutters, or sidewalks.

Sidewalk widths within the Specific Plan area vary depending on the age of the sidewalk and whether it was a permanent or temporary feature built to close a gap. Widths vary from about 4 feet on temporary gap closures to 6 feet in older commercial areas. The Town's standards also require a parkway, which should be landscaped. Current Town standard parkway widths are:

- 12 feet total on major and secondary streets, with a 6 foot sidewalk separated from the travel-way by a 6-foot wide landscaped parkway,
- 10 to 11 feet on collectors,
- 11 feet on industrial and commercial local streets,
- 12 feet on local streets, and
- 7 feet on rural streets and cul-de-sacs.

In many areas of the Specific Plan, the landscaped parkway has been replaced by asphalt or concrete, creating a stark and uncomfortable atmosphere for pedestrians and bike riders, and eliminating the potential for shaded on-street parking.

Marked crosswalks in the Specific Plan area are shown on Exhibit 10. All of them are at signalized crossings of major streets. However, at some intersections, crosswalks are not marked in all directions (north/south, east/west), which limits pedestrian movement and safety. Many Americans with Disabilities Act (ADA)-compliant sidewalk ramps are missing, making wheelchair access challenging or impossible. These conditions create a combination of practical and safety obstacles, which will require attention in the Specific Plan.



Bicycle Facilities

The Town's General Plan Circulation Element establishes a bikeway classification system that is consistent with the Caltrans Highway Design Manual:

- Shared Roadway (no bikeway designation)
- Class I Bikeway (Bike Path) – off-street multi-use path
- Class II Bikeway (Bike Lane) – on-street marked bike lane
- Class III Bikeway (Bike Route) – on-street signed bicycle route

Caltrans recently added a Class IV Bikeway (Separated Bikeway) designation that separates the bikeway from vehicular through traffic using grade separation, flexible posts, inflexible posts or barriers, or rows of parked cars. This designation is relatively new and, therefore, not included in the General Plan.

Exhibit 11 identifies existing bikeways in the Specific Plan area. As shown, bikeways are in only two locations: 1) Class II bike lane on both sides of Navajo Road north of Highway 18 (north of Del Taco), and 2) substandard Class I bike path on the south side of Yucca Loma Road west of Algonquin Road. Although this pathway exists, it is in poor condition, has no curbs or rest facilities, and is unmarked.

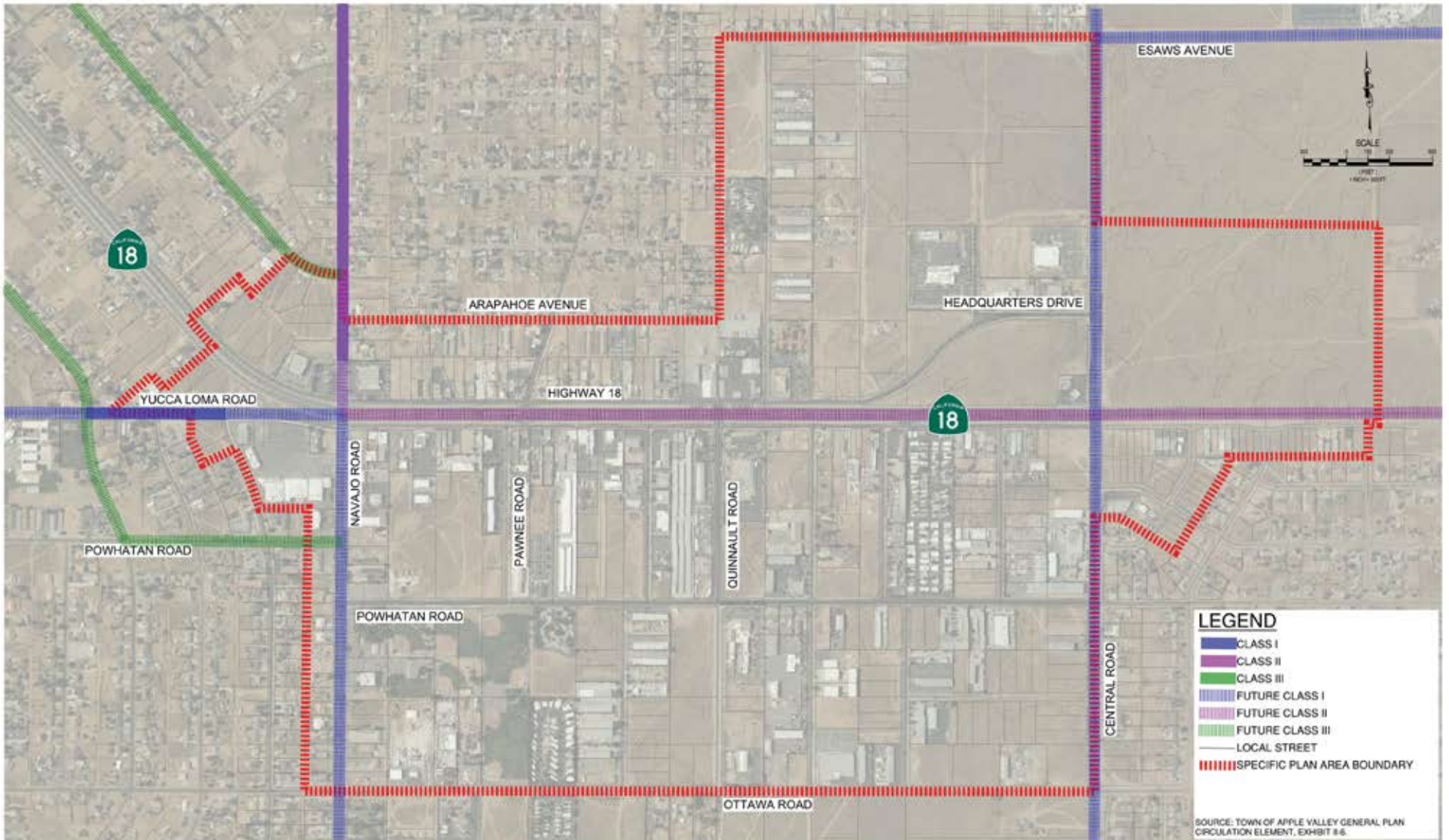
Exhibit 11 also identifies future bikeways designated in the General Plan. Within the Specific Plan area, future Class I facilities are planned for Central Road, Navajo Road south of Highway 18, and Yucca Loma Road. Class II facilities are planned along Highway 18 and Navajo Road north of Highway 18. Class III facilities are planned for Powhatan Road west of Navajo Road, and Pine Ridge Avenue west of Navajo Road. Improvement of the bike experience and safety in the Specific Plan area will be a consideration in the Specific Plan.

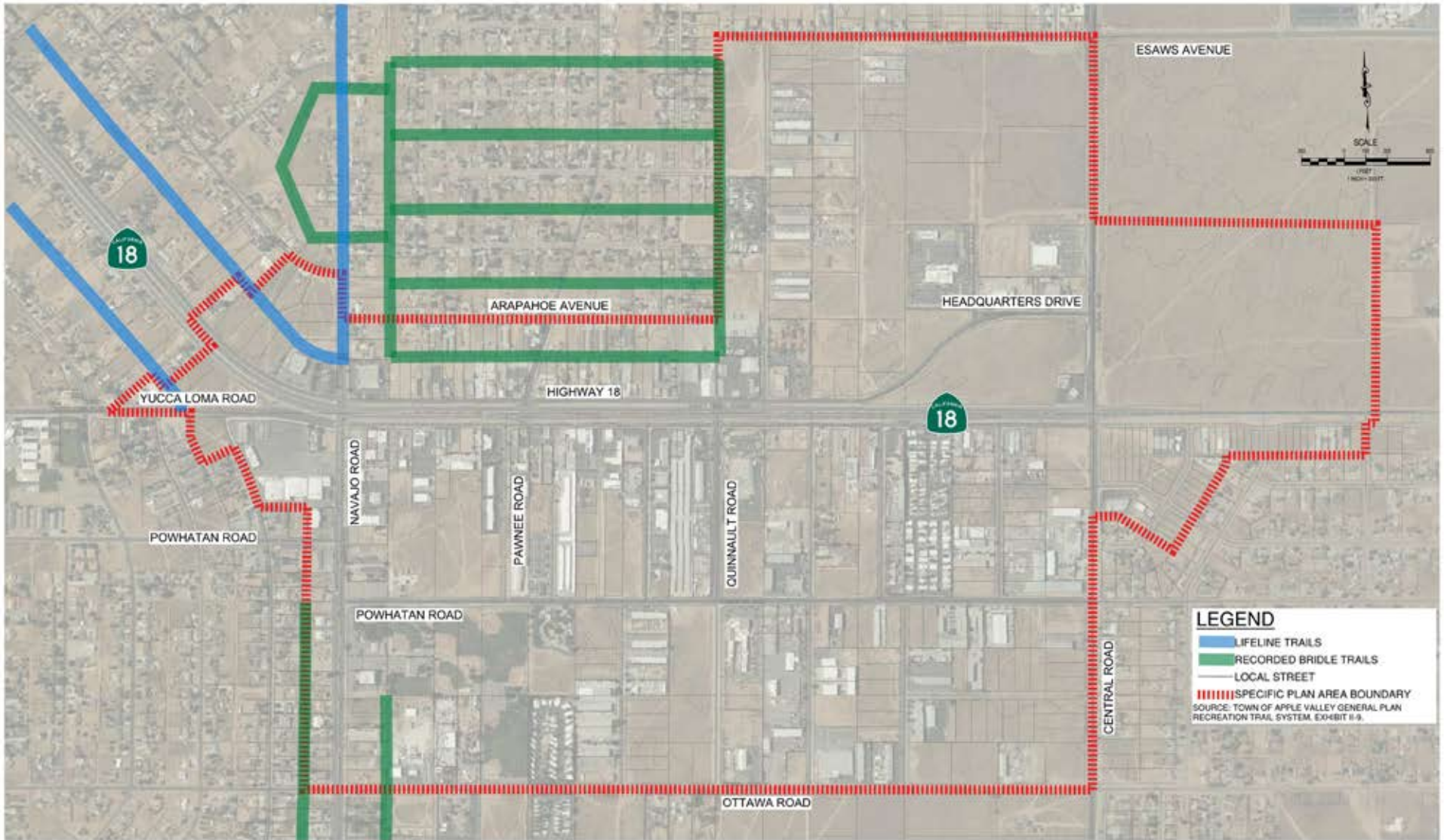
Recreational Trails

The General Plan Circulation Element identifies two types of recreational trails: Lifeline Trails and Bridle Easements/Trails. Lifeline Trails are multi-use trails for walking, bicycle riding, horseback riding, and "any other device moved by human propulsion." According to the Town's adopted Recreation Trail System Plan, there are approximately 103 miles of designated Lifeline Trails. Bridle Easements/Trails are recorded easements that are mapped and known to be used for equestrian use; however, they are not improved or marked.

Both type of trails are shown on Exhibit 12. Lifeline Trails are in the westerly portion of the Specific Plan area on: 1) Navajo Road north of Highway 18 (north of Del Taco and Rite Aid), 2) rear property line of parcels fronting on Outer Highway 18-N and Pine Ridge Avenue, terminating at the rear property line of Del Taco, and 3) rear property line of parcels fronting Outer Highway 18-S and Rancherias Road, terminating at Yucca Loma Road. Bridle Trails are located along: 1) rear property line of parcels fronting Outer Highway 18-S and Arapahoe Avenue, 2) rear property

line of parcels on east side of Navajo Road, south of Michael Martin Gymnasium, and 3) rear property line of parcels on west side of Navajo Road, south of Powhatan Road. As with bike lanes, trails and sidewalks will be a consideration in the Specific Plan, to improve the pedestrian experience and pedestrian safety.





Source: David Evans and Associates, Inc., 2021

9.7.21

Truck Routes

Chapter 12.36 of the Apple Valley Municipal Code defines and establishes regulations for truck routes. The Code defines a “truck” as any vehicle having a manufacturer’s gross vehicle weight rating exceeding 10,000 pounds. Truck routes in the Village Specific Plan area are shown on Exhibit 13 and summarized below.

Table 7
Truck Routes in the Specific Plan Area

Truck Route Designation	Road
Through Truck Routes: designated streets upon which the unrestricted use of trucks is permitted.	Highway 18 Central Road
Local Truck Routes: designated streets upon which trucks with an origin and/or destination within the Town may operate only between the hours of 7:00 am and 7:00 pm.	Navajo Road
Restricted Streets: all streets other than those designated as Local Truck Routes or Through Truck Routes. Exceptions are provided for trucks making pickups or deliveries of goods, wares, and merchandise to/from businesses and residences to use restricted streets during designated hours. Additionally, trucks may travel on restricted streets by the shortest and most direct route between a Town boundary and destination if such a route is shorter than the route between a destination and the nearest truck route.	all other roads

The industrial and quasi-industrial development currently occurring south of Highway 18, and currently limited but planned north of Highway 18, may require an expansion of local truck routes to safely accommodate east-west truck movement off Highway 18 in the long term.

Transit

The Victor Valley Transit Authority (VFTA) provides public transit services to the Town of Apple Valley and broader Victor Valley. As shown in Exhibit 14, the following fixed bus routes pass through the Specific Plan area:

Route 23	Apple Valley – Lucerne Valley
Route 40	Apple Valley North Deviation
Route 41	Lorene – 7 th – Apple Valley Post Office
Route 43	Apple Valley Post Office – Victor Valley College
Route 47	Apple Valley South Deviation

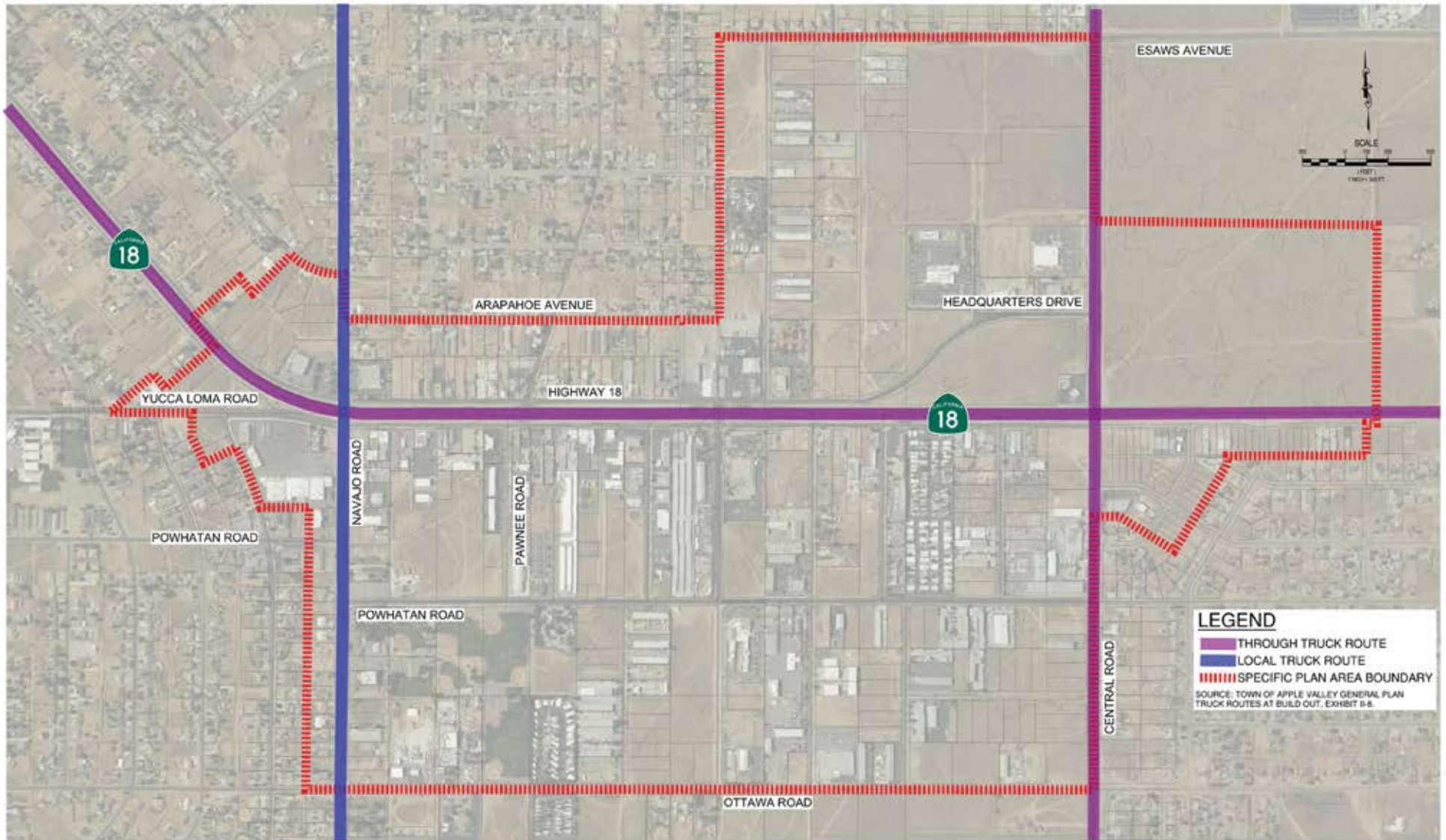
The existing US Post Office currently acts as a mini-transfer station, with connections between routes possible at this bus stop. Although shelters are available, no other facilities exist at this location.

There are ten (10) bus stops in the Specific Plan area. As shown in the following table, half of them have pedestrian shelters with benches. The other half have no amenities, only signage. The lack of amenities makes them difficult to find and less comfortable for waiting passengers.

Table 8
Bus Stop Amenities

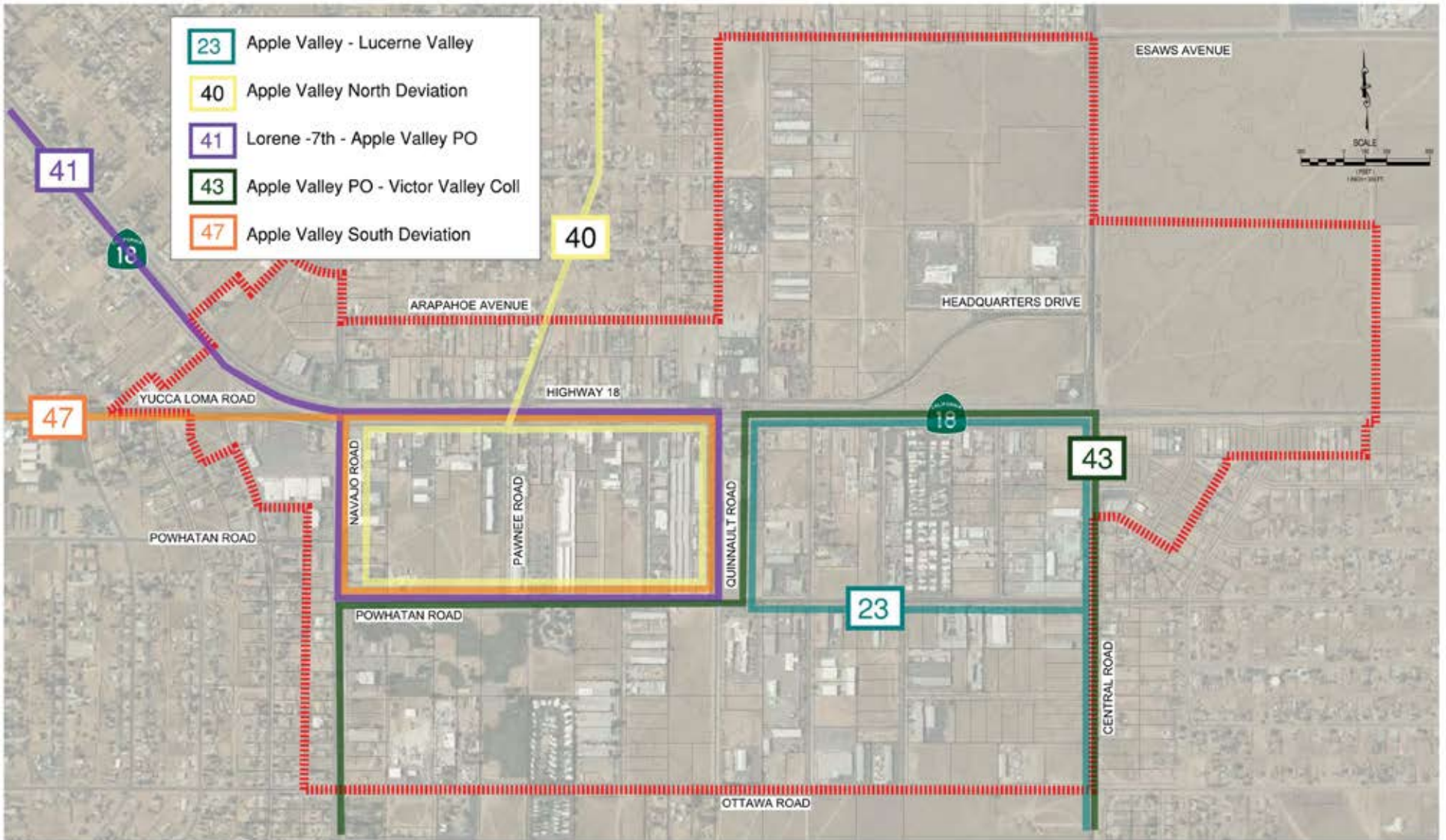
Bus Stop Location	Pedestrian Shelter and Bench?
Quinnault Road @ Post Office	yes
Central Road @ Shawnee Road	no
Central Road, south of Powhatan Road	no
Powhatan Road @ James A. Woody Park	yes
Pawnee Road, north of Highway 18	no
Highway 18, east of Navajo Road	yes
Navajo Road, north of Powhatan Road	yes
Navajo Road @ Michael Martin Gymnasium	yes
Navajo Road, north of Ottawa Road	no
Yucca Loma Road, west of Navajo Road	no

VFTA also provides Direct Access, a curb-to-curb service for individuals who meet the Americans with Disabilities Act (ADA) requirements and are certified with VFTA. VFTA's Regional Vanpool Program provides subsidies for vanpools of 5 to 15 passengers. The Victor Valley Community Services Council (VVCSC) partners with VFTA to provide no-cost non-emergency transportation for low-moderate income seniors or disabled persons.



Source: David Evans and Associates, Inc., 2021

9.7.21



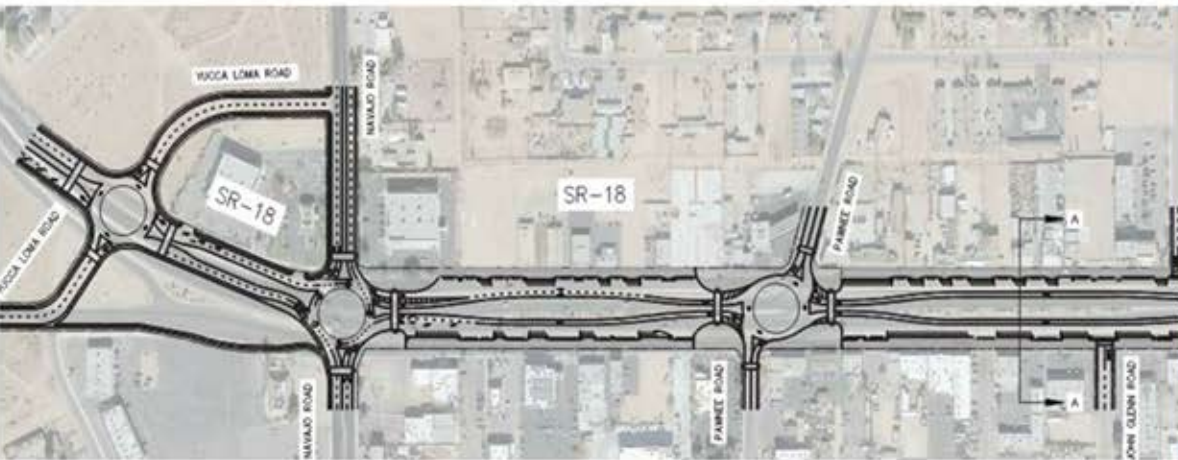
Previous Circulation Analysis

The Village State Route-18 Corridor Enhancement Plan² (2019) analyzed challenges related to the Highway 18 roadway configuration in the Village Specific Plan area, with particular focus on access between Highway 18, its frontage roads, and businesses along the corridor. Because Highway 18 is located within Caltrans' right-of-way, the planning process involved close coordination with Caltrans. Five (5) project alternatives were developed to improve corridor-wide safety, accessibility, and traffic operations. All alternatives proposed wider sidewalks, buffered bike lanes, and connection of Yucca Loma Drive to Highway 18. The alternatives and their key concepts include:

- "All Signals" Alternative – relies on traffic signals for traffic control, converts frontage roads to one-way operations with angled parking on both sides, adds new signalized intersection at Pawnee Road and Hitt Road.
- "Roundabouts" Alternative – converts signalized and other intersections on Highway 18 to roundabouts at six locations, uses angled parking on both sides of roadway.
- "Michigan U-Turns" Alternative – removes frontage roads between Navajo and Central Roads and replaces them with a wide parkway and angled parking, cross median movements would be made by U-turns at three signal locations.
- "Contra Flow Frontage Roads" Alternative – converts frontage roads to one-way clockwise circulation ("contra flow") design in which Outer Highway 18-North travels west to east, and Outer Highway 18-South travels east to west.
- "Big and Little Highway 18" Alternative – between Navajo and Central Roads, eliminates Outer Highway 18-North, shifts existing Highway 18 to the north, and installs new parking and bikeway facilities within the right-of-way between Highway 18 and Outer Highway 18-South.

The two concepts deemed most viable and desirable by the Town and community stakeholders were the "All Signals" and "Roundabouts" alternatives, shown in Exhibits 15. The Specific Plan will expand on the analysis of the feasibility and design of these two alternatives.

² The Village State Route-18 Corridor Enhancement Plan, Town of Apple Valley, September 2019.



Source: David Evans and Associates, Inc. 2021



9.3.21

3.B Stormwater Management

Regional Drainage

The Town of Apple Valley is within the Mojave River Watershed which encompasses approximately 4,500 square miles. The primary surface hydrologic feature of the watershed is the Mojave River with headwaters in the San Bernardino Mountains. The mountains typically receive more than 40 inches of precipitation annually, which recharges the Mojave River system.

Local Drainage

The Apple Valley Public Works Department is responsible for local drainage management in the Town boundaries. Local facilities are mapped and planned in the Town's Master Plan of Drainage Plan (MPD).

Drainage in the Village Specific Plan area originates from the Ord Mountains of the San Bernardino Mountain Range, south of Apple Valley. Terrain in the Specific Plan area is relatively flat and slopes gently from southwest to northeast. There is an average slope of 0.4% from about 4 miles upstream of the Specific Plan area.³ Elevations range from approximately 2,930 feet above mean sea level in the northeast (intersection of Central Road and Esaws Avenue) to 2,950 feet in the southwest (James A. Woody Community Center). Soils generally consist of Helendale Loamy Sand (0 to 2 percent slopes) east of Pawnee Road, and Bryman Loamy Fine Sand (0 to 2 percent slopes) west of Pawnee Road.⁴

According to the MPD, an area called the Mariana Wash just west of Central Road and Highway 18 could receive a large storm water flow with a discharge of 7,952 cubic feet per second (cfs) in a 100-year storm event. However, there is no evidence that flows in that vicinity concentrate at such a magnitude. It is believed that the railroad and Bear Valley Road to the south limit the amount of storm water that passes into the Specific Plan area, and that flows in this vicinity spread out into smaller flow areas.⁵

The vicinity of Navajo Road just south of the James A. Woody Community Center also receives upstream stormwater flows. Storm flows that cross Navajo Road just north of Ottawa Road flow around the community center then north toward Highway 18.

Stormwater Improvements

Exhibit 16 shows existing stormwater infrastructure in the Specific Plan area. Two concrete trapezoidal channels (drainage ditches) extend parallel to, and in the outer medians of, Highway 18 between Navajo Road and Central Road. They have a total capacity of 77 cubic feet per second (cfs). The MPD indicates that discharge for the channels is 230 cfs in a 25-year storm

³ Apple Valley Village Corridor Enhancement Plan Drainage Study, David Evans and Associates, July 23, 2019.

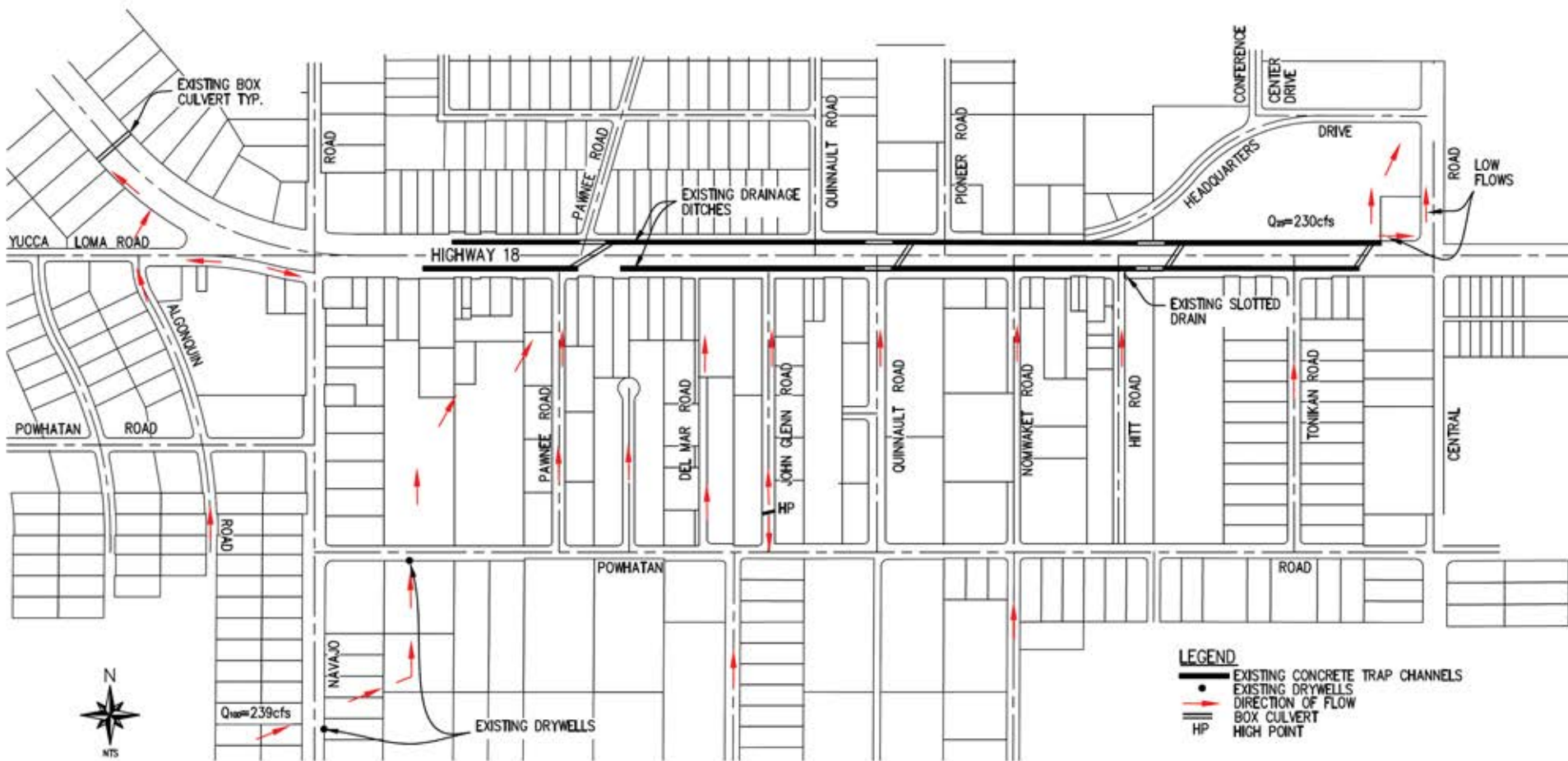
⁴ Web Soil Survey, US Department of Agriculture, www.websoilsurvey.sc.egov.usda.gov, accessed May 2021.

⁵ Apple Valley Village Corridor Enhancement Plan Drainage Study, David Evans and Associates, July 23, 2019.

event. The southerly channel captures upstream flows via sheet flow. A small, slotted drain inlet extends across Outer Highway 18-South at Hitt Road and drains into the southerly channel. Between Pawnee and Central Roads, four (4) low flow culvert crossings extend under Highway 18 from the southerly channel to the northerly channel. Drainage is then conveyed to a small swale adjacent to a gas station at the northwest corner of Highway 18 and Central Road. Overflows flow on the ground surface north behind the gas station, then northeasterly through mostly vacant land.

Other stormwater improvements in the Specific Plan area include two (2) dry wells in the southwest: one on Powhatan Road just north of James A. Woody Park, and one on Navajo Road south of the Michael Martin Gymnasium. Discharge in this vicinity is 239 cfs in a 100-year storm event. Overflow from these dry wells flows northeast to Highway 18 through vacant and developed parcels.

Near the westerly edge of the Specific Plan area, a box culvert crosses Highway 18 west of Yucca Loma Road. It conveys stormwater flows from Algonquin Road to land north of Highway 18.



Previous Drainage Analysis

The Apple Valley Village Corridor Enhancement Plan Drainage Study⁶ (2019) was prepared in conjunction with the Village State Route-18 Corridor Enhancement Plan to evaluate drainage patterns along Highway 18 between Navajo Road and Central Road. The study developed three (3) stormwater improvement alternatives that would complement circulation improvements proposed in the Corridor Enhancement Plan. The alternatives included:

- Alternative 1 – leaves existing concrete channels in place; repairs or replaces concrete where needed; installs additional catch basins and dry wells at intersections; installs a bio swale and combination basin and/or drywells at the outlet near the gas station at Highway 18 and Central Road.
- Alternative 2 – replaces existing channels with larger capacity (double 6 ft x 6 ft) box culverts in a similar layout to existing channels; adds catch basins at intersections of the south side of Outer Highway 18; installs a 60" storm drain on Powhatan and Pawnee Roads from James A. Woody Park to Highway 18.
- Alternative 3 – installs upstream improvements, such as large detention basins, to reduce flows reaching the Village (however, to provide adequate mitigation, sizable areas between 40 and 121 acres would be required); installs smaller storm drains and basins in the Specific Plan area.

The drainage study determined that a combination of the alternatives may be required to achieve effective results, and additional study could be required after the preferred Highway 18 cross section is selected.

3.C Utilities

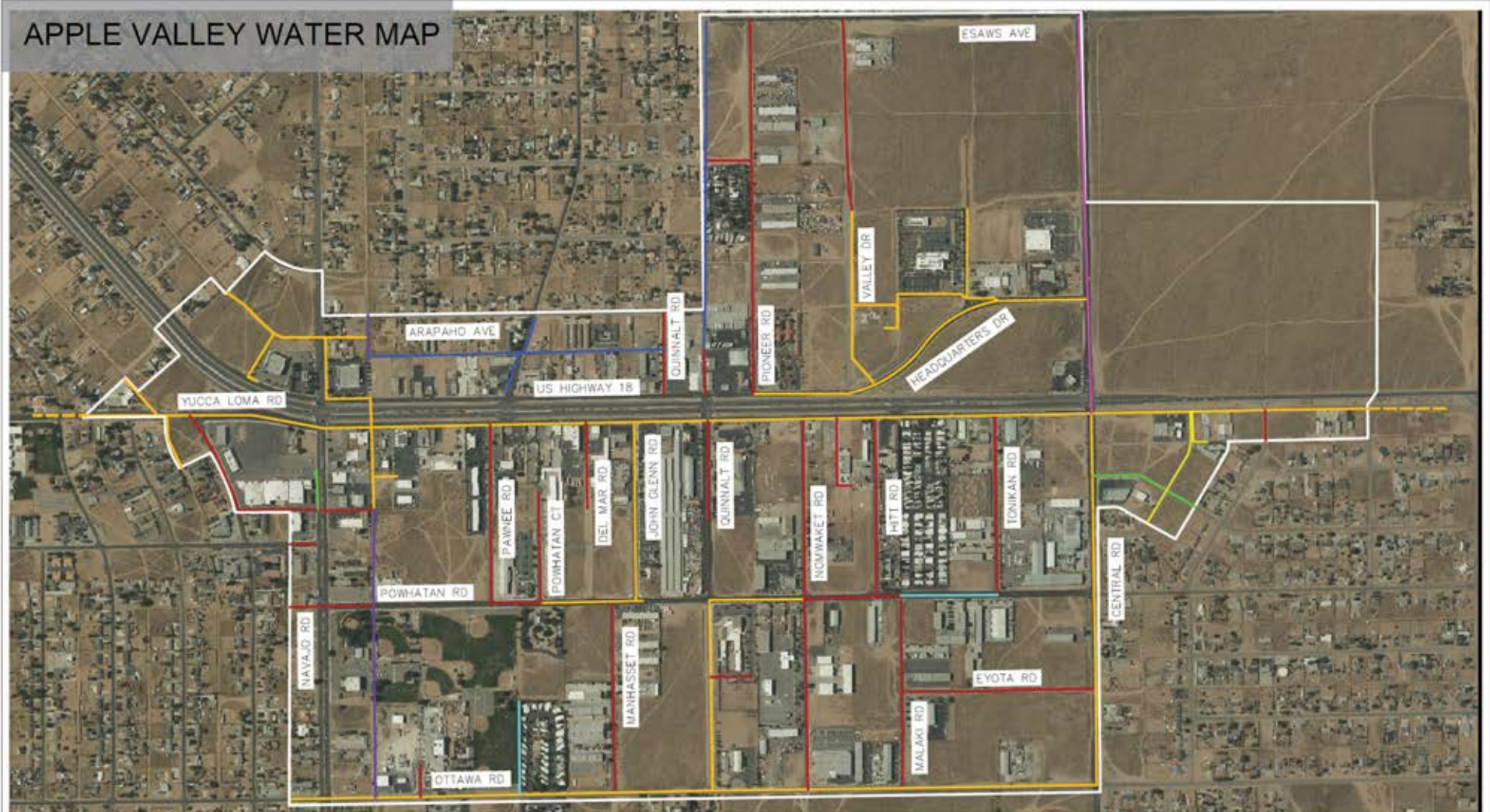
Domestic Water

Liberty Utilities provides domestic water services to much of Apple Valley, including the Village Specific Plan area. It extracts groundwater from the Alto sub-unit of the Mojave River Basin through 20 deep wells. As a member agency of the Mojave Water Agency, it also purchases imported water from the State Water Project (SWP) to replenish pumped groundwater.

As shown in Exhibit 17, the Specific Plan area is well served by water lines ranging from 4 to 14 inches in diameter. Larger lines are generally located along Highway 18, Yucca Loma Road, Ottawa Road, Central Road, and Headquarters Drive. Smaller lines generally extend along connecting streets. Water lines are also immediately adjacent to or in proximity to vacant parcels such that connections to future development are feasible, and extensions by new development will be limited, particularly on the south side of the Highway.

⁶ Ibid.

APPLE VALLEY WATER MAP



LEGEND

	4" WATER LINE		8" WATER LINE		12.75" WATER LINE
	6" WATER LINE		8.63" WATER LINE		14" WATER LINE
	6.63" WATER LINE		12" WATER LINE		

PLAN
SCALE: 1"= 300'



Sewer

The Town of Apple Valley operates the local wastewater collection system which consists of approximately 145 miles of sewer pipes and 8 lift stations. The system is relatively new and does not cover the entire Town, and many properties rely on septic systems. Wastewater is conveyed to the Victorville Wastewater treatment plant in Victorville, which is operated by the Victor Valley Wastewater Reclamation Authority (VWRA), a joint powers authority that includes the Town of Apple Valley. It treats approximately 10.7 million gallons per day (mgd) and has a design treatment capacity of 18 mgd, with planned future expansions. A portion of locally generated wastewater is recycled at the Apple Valley Subregional Water Recycling facility near Brewster Park. It is capable of producing one million gallons of recycled water per day. Recycled wastewater is used to irrigate Brewster Park, the Apple Valley Golf Course, and other civic facilities.⁷

As shown in Exhibit 18, much of the Specific Plan area is connected to the sewer system, with sewer lines ranging from 4 to 24 inches in diameter. A wet well and lift station are in the southeasterly portion of the Specific Plan area near the corner of Central Road and Ottawa Road. Sewer lines do not extend into the easterly and northeasterly portions of the Specific Plan area. These areas are currently undeveloped, and extensions will be required to support future development.

Sewer facilities in the Village Specific Plan area are in Assessment District (AD) 2A. Wastewater from AD 2A generally flows north to Lift Station VWRA Nanticoke AD 2 at the intersection of Standing Rock Road and Nanticoke Road. From there, it flows nearly two miles westerly along and parallel to Standing Rock Road to Highway 18, then flows by gravity to the VWRA regional intercept line which leads to the Victor Valley Wastewater treatment plant.

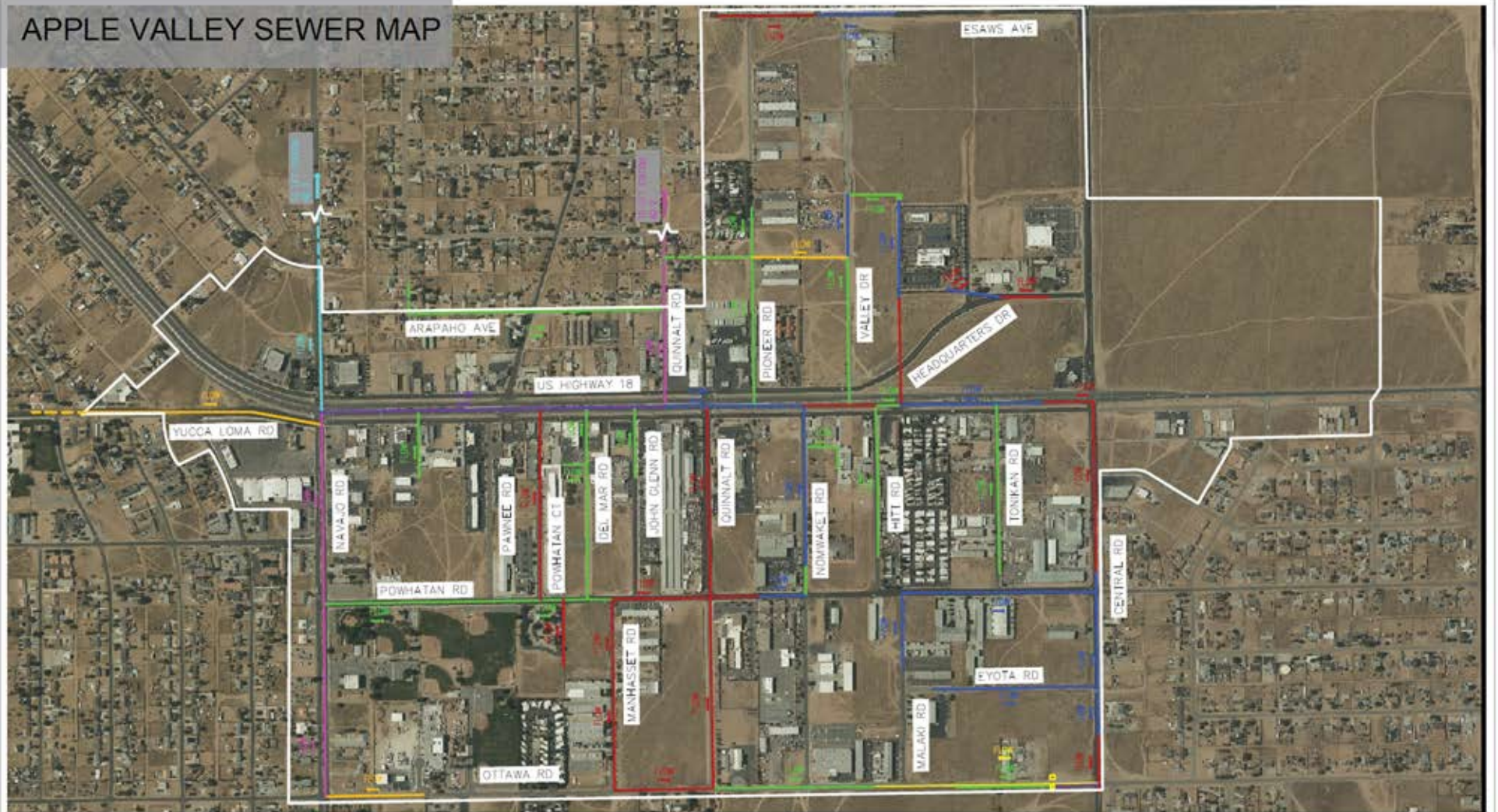
Section 10.01.040 of the Apple Valley Municipal Code requires connection to public sewer in a variety of circumstances, including:

- 1) projects involving domestic wastewater discharge in excess of 500 gallons/acre/day as determined by the Town,
- 2) projects with industrial or non-domestic waste discharge,
- 3) projects that exceed two equivalent dwelling units (EDU)/acre density,
- 4) projects that do not comply with Town standards for private sewage disposal systems,
- 5) projects on property located within 200 feet of a public sewer, when measured from property line to existing sewer location, and
- 6) projects that meet the requirements of the Town's 2006 Sewer Connection Policy.

⁷ Victor Valley Wastewater Reclamation Authority website, <http://vwra.com>, accessed May 2021.

Additionally, existing buildings and facilities connected to private sewage disposal systems must connect to public sewer in certain circumstances, such as failure of the private sewage disposal system when the above-described criteria are met or private sewage disposal is causing or may cause deterioration of groundwater quality. The development anticipated to occur in the Specific Plan area will require connection to sewer facilities.

APPLE VALLEY SEWER MAP



LEGEND						
FORCE MAIN WET WELL AND LIFT STATION		4" FORCE MAIN		10" SEWER LINE		18" SEWER LINE
		6" SEWER LINE		12" SEWER LINE		21" SEWER LINE
		8" SEWER LINE		15" SEWER LINE		

PLAN
SCALE: 1"= 300'

Electricity

Southern California Edison (SCE) provides electricity to the Town of Apple Valley, including the Village Specific Plan area. SCE has major 115 kilovolt (kV) electric transmission corridors in the region, from which lower voltage distribution lines and circuits extend.

Within the Specific Plan area, most power lines are above-ground and typically extend along the roadways or rear property lines. However, they appear to have been undergrounded in the vicinity of newer development such as Fire Station No. 1 and the Mojave Water Agency on Headquarters Drive.

Section 14.28.020 of the Apple Valley Municipal Code requires underground installation for all electrical lines of 34.5 kV or less which: a) provide direct service to the property being developed, or b) are existing and located within the boundaries being developed, or c) are existing between the property line and centerline of the peripheral streets of the property being developed, or d) are located along or within 6 feet of lot lines of the property being developed, or e) are located within the existing or required right-of-way for the project, or f) are relocated as result of the project.

Natural Gas

Southwest Gas Company (SWG) provides natural gas services to the Town, including the Village Specific Plan area. The network includes 36-inch diameter high pressure lines with pressure levels ranging from 400 to 700 pounds per square inch (psi), 2 to 8-inch diameter distribution lines operating at 174 to 400 psi, and 2 to 4-inch diameter distribution lines operating at 45 to 55 psi. Distribution lines occur in Central Road and Ottawa Road, bordering the Specific Plan area. SWG works closely with developers to extend facilities and services to new development as needed.

Telecommunications

Frontier and Charter Spectrum provide telecommunications services, including telephone, high-speed internet service, and cable television, to the Town of Apple Valley, including the Village Specific Plan area.

Solid Waste

AVCO Disposal, Inc., a Burrtec company, provides solid waste collection and disposal services to the Town of Apple Valley, including the Village Specific Plan area. Solid waste is disposed of at the Victorville Landfill on Stoddard Wells Road west of Interstate-15. The landfill is operated by San Bernardino County, permitted to receive up to 3,000 tons of solid waste per day, and has an estimated remaining capacity of 79,400,000 cubic yards as of March 2020.⁸

⁸ Calrecycle website, <http://www2.calrecycle.ca.gov/SolidWaste/SiteActivity/Details/1870?siteID=2652>, accessed May 2021.

AVCO also picks up commercial and residential recyclable materials, which are sorted at the Victor Valley Materials Recovery Facility (MRF) on Abbey Lane south of the landfill. The facility is capable of sorting 20 tons of materials per hour.⁹

The Town's Household Hazardous Waste (HHW) facility is located at 13450 Nomwaket Road in the southern portion of the Village Specific Plan area. It accepts pesticides, batteries, medications, paint thinners, electronics, gasoline and fuels, among other hazardous items.

⁹ Town of Apple Valley website, <http://www.applevalley.org/services/solid-waste-trash/materials-recovery-facility-mrf>, accessed May 2021.

4. DEMOGRAPHICS AND MARKET ANALYSIS

The Village Specific Plan area serves the retail and service needs of two markets: the regional passerby market that includes residents extending from Victorville on the west to Lucerne Valley on the east, and the local market that includes residents living in proximity to the Specific Plan area.

This section evaluates the demographic, socio-economic, consumer, and retail market characteristics of both markets: Regional Market and Local Market. It analyzes the behaviors and preferences of consumers within each, as well as current retail market leakages and surpluses, for the purpose of informing and guiding future land use, infrastructure, and design strategies in the Specific Plan area.

4.A. Regional Market Area

4.A.1. Description

Highway 18 is the principal transportation corridor connecting Interstate-15 and much of the Victor Valley on the west, to Lucerne Valley and other desert and mountain communities on the east. The Village Specific Plan area is centrally located along Highway 18 and easily accessible to passerby traffic, with the potential to capture sales from a large regional consumer market.

For the purposes of this analysis, the Regional Market Area includes the Town of Apple Valley, City of Victorville, and the communities of Spring Valley Lake, Mountain View Acres, and Lucerne Valley. The communities were selected based on their proximity to the Specific Plan area and the likelihood of their consumers to shop there. For example, although Lucerne Valley is ±13 miles from the Specific Plan area, it lacks a range of retail establishments like specialty stores and warehouse clubs, and residents typically travel west via Highway 18 for to fulfill those shopping needs, with Apple Valley being the closest market available. The five (5) communities are evaluated as a single unit below to account for the volume of the regional consumer base surrounding the Specific Plan area.

Data are from 2020/2025 Esri Updated Demographics, which is based on a variety of public data and proprietary methodologies and models, including but not limited to U.S. Census and American Community Survey data, Annual Compound Growth Rates, Nielsen's Designated Market Area data, Racial Diversity Index, and others.

4.A.2. Demographic and Socio-Economic Characteristics

Population

The Regional Market Area 2020 population is 220,209. The population is projected to reach 228,956 by 2025. The median age is 38.4 years, and 73% of residents are 18 years or older. The population is 50% male and 50% female.

Table 9
Regional Market Area Population

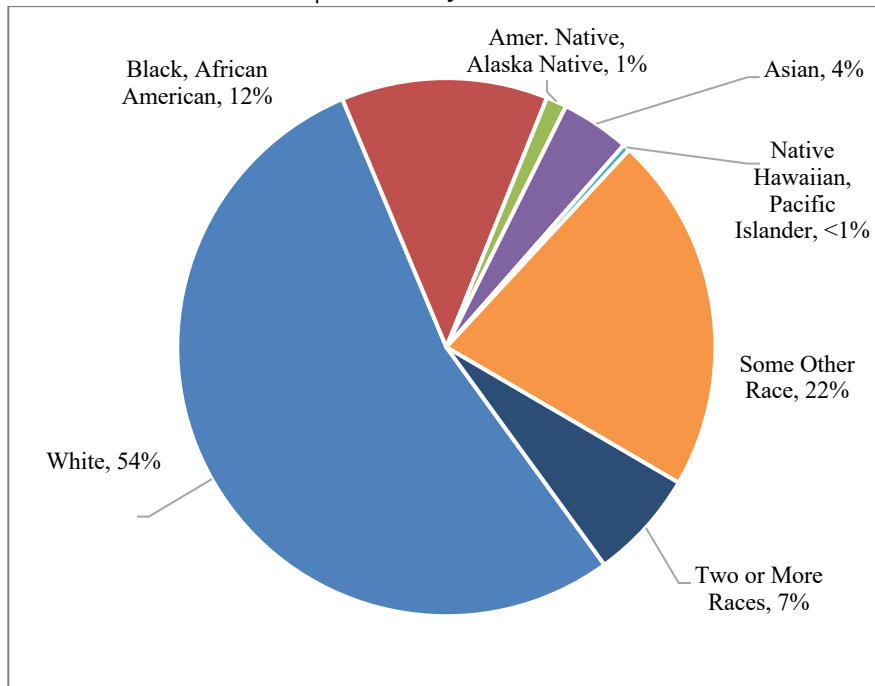
Jurisdiction	2020 Population	2025 Projected Population	Median Age
Town of Apple Valley	73,674	76,029	38.2
City of Victorville	128,362	134,209	30.4
Spring Valley Lake ¹	8,580	8,781	43.6
Mountain View Acres ¹	3,351	3,467	34.2
Lucerne Valley ¹	6,242	6,470	45.4
Total:	220,209	228,956	38.4 ²

¹ Census Designated Place (CDP)

² average of the 5 median ages

As shown in Chart 1, the majority of residents (54%) categorize themselves as “White,” followed by “Some Other Race” (22%), “Black/African American” (12%), “Two or More Races” (7%), “Asian” (4%), “American Native/Alaska Native” (1%), and “Native Hawaiian/Other Pacific Islander” (less than 1%). Approximately 47.2% are Hispanic/Latino of any race.

Chart 1
Regional Market Area
Population by Race, 2020



Housing and Households

There are 67,353 households in the Regional Market Area. In 2018, there were 68,544 total housing units; most were single-family detached units (78.3%), multi-family 2-4 units (7.4%), and multi-family 5+ units (7.4%) (Table 10). Approximately 8% of dwelling units are vacant. Approximately 58% are owner-occupied, and 34% are renter-occupied. The median home value is \$253,308, and median gross rent is \$1,196 (average of all 5 jurisdictions).

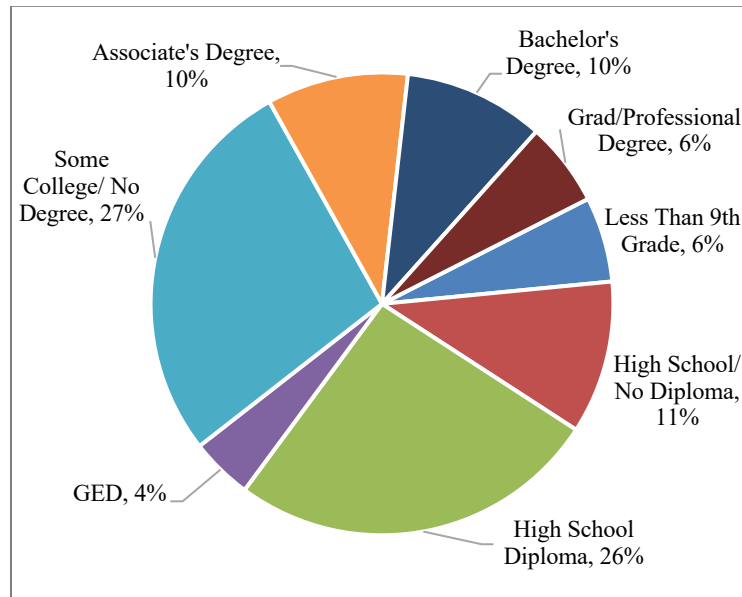
Table 10
Regional Market Area
Housing Units, 2018

Unit Type	No. of Units	% of Total
Single-Family Detached	53,673	78.3%
Single-Family Attached	1,279	1.9%
Multi-Family, 2-4 units	5,089	7.4%
Multi-Family, 5+ units	5,108	7.4%
Mobile Homes	3,268	4.8%
Boat/RV/Van/etc.	127	0.2%
Total:	68,544	100.0%
Median Home Value, 2020:	\$253,308	
Median Gross Rent, 2020:	\$1,196	

Education

Chart 2 shows educational attainment for adults 25 years and over in the Regional Market Area. The majority of residents has “Some College/No Degree” (27%), followed by “High School Diploma” (26%).

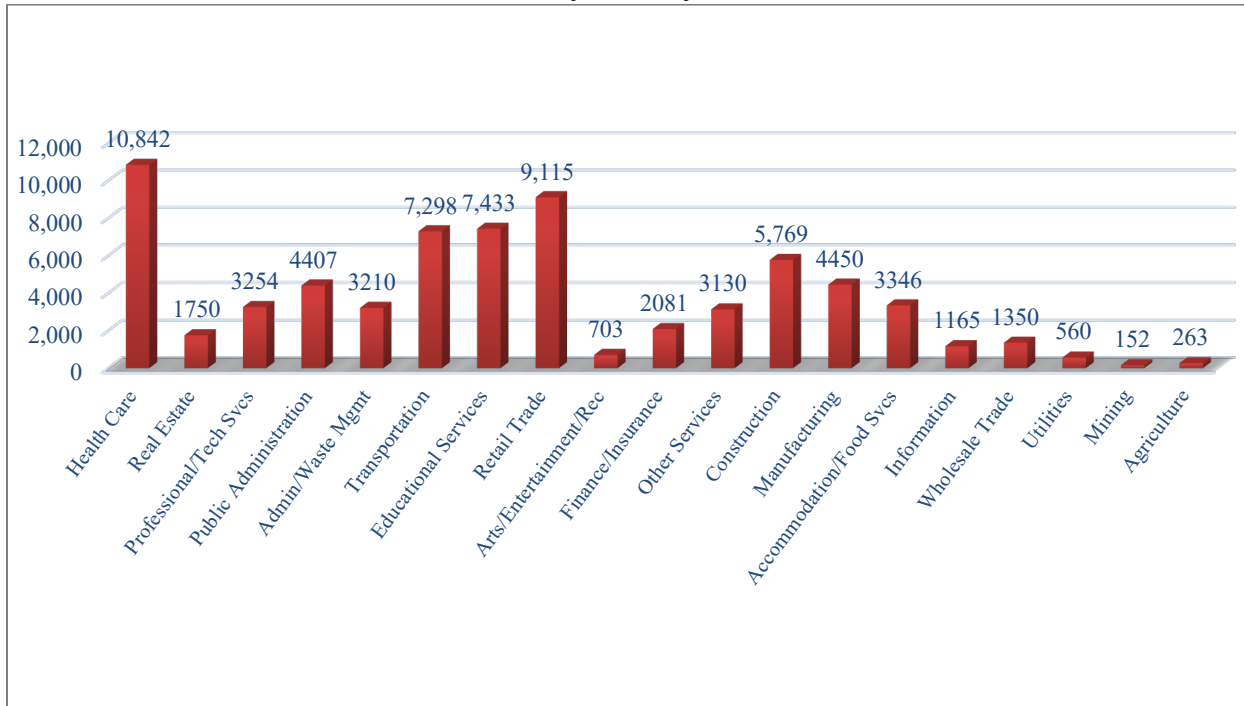
Chart 2
Regional Market Area
Educational Attainment, 2020



Industry and Employment

The total labor force in the Regional Market Area includes 87,169 civilians age 16 and over. Approximately 70,370 (80.7%) of them are employed in the industries shown in Chart 3. The industries employing the most residents are Health Care (15.4%), Retail Trade (13.0%), Educational Services (10.6%), and Transportation (10.4%).

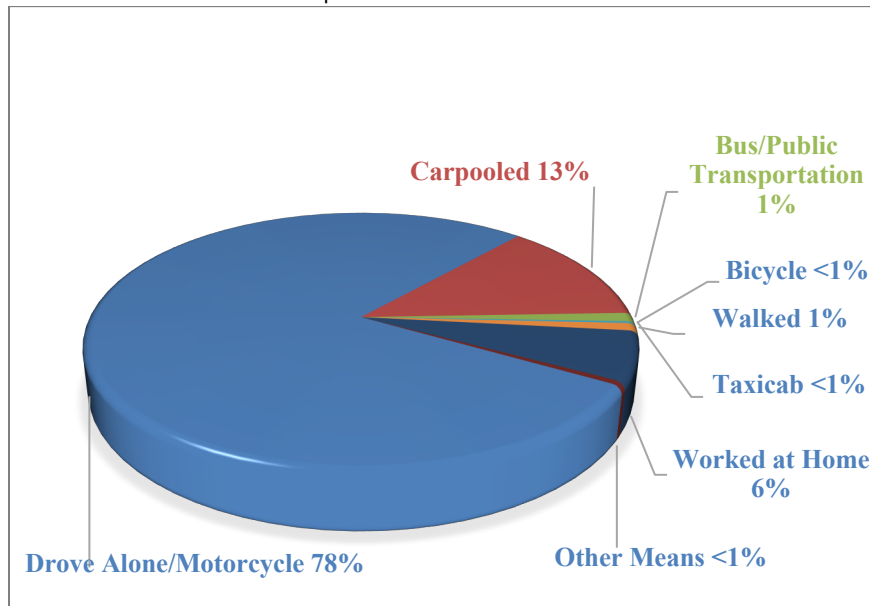
Chart 3
Regional Market Area
Jobs by Industry, 2020



Transportation to Work

Chart 4 shows modes of transportation used by residents in the Regional Market Area to commute to work. Most drive alone or ride a motorcycle (78%), carpool (13%), and work at home (6%). The other modes of transportation combined account for less than 4% commuter trips.

Chart 4
Regional Market Area
Transportation to Work, 2018



Income and Spending

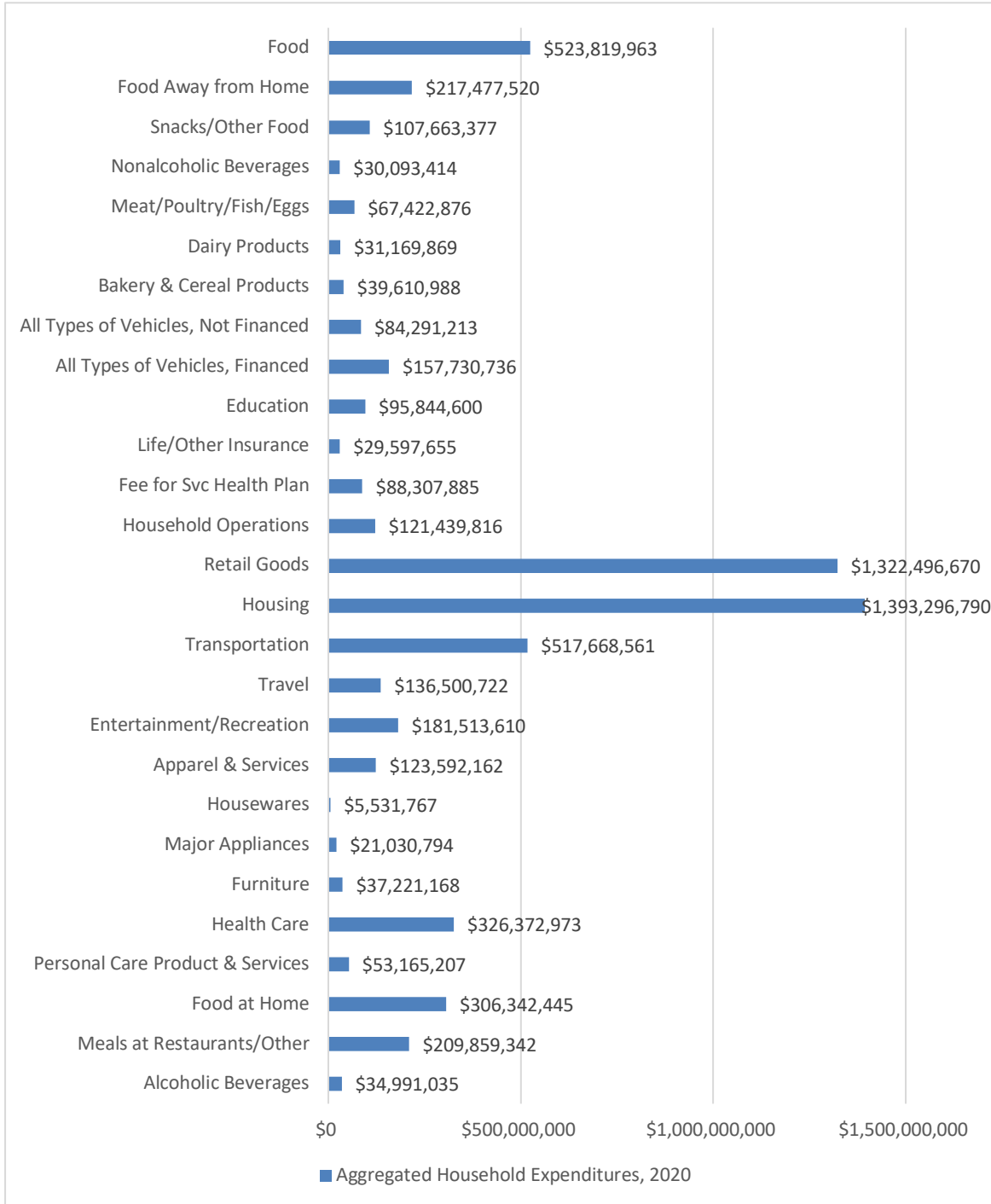
Table 11 describes median income for each of the five (5) jurisdictions in the Regional Market Area. They range from \$38,588 in Lucerne Valley to \$83,604 in Spring Valley Lake. The average median household income is \$58,692.

Table 11
Regional Market Area
Median Household Income, 2020

Jurisdiction	Median Household Income
Town of Apple Valley	\$57,918
City of Victorville	\$55,028
Spring Valley Lake	\$83,604
Mountain View Acres	\$58,323
Lucerne Valley	\$38,588
Average:	\$58,692

Chart 5 shows 2020 aggregated expenditures, by category, for all households in the Regional Market Area. It includes expenditures of all types, such as housing, food, education, furniture, and health care. The highest expenditures categories in the region are: 1) Housing, \$1.39 billion, 2) Retail Goods, \$1.32 billion, 3) Food, \$523 million, and 4) Transportation, \$517 million.

Chart 5
Regional Market Area
Aggregated Annual Household Expenditures, 2020



4.A.3. Consumer Characteristics

Tapestry Segmentation

The Regional Market Area was analyzed using a well-developed market assessment tool from Esri called “Tapestry Segmentation” to evaluate consumer characteristics. The model categorizes adult residents with similar household and socio-economic traits, and spending behaviors and preferences, into 68 consumer groups, or “tapestry segments.” Data sources include Census, American Community Survey, Esri’s demographic updates, and consumer surveys. It should be noted that tapestry segments represent general characteristics of consumers in the market area, not their precise current or future consumption patterns.

Consumers in the Regional Market Area fit the characteristics of thirty (30) different tapestry segments. The ten (10) tapestry segments with the largest populations are described in Chart 6 and Table 12. Combined, they include 74% of the total population in the Regional Market Area. The other twenty (20) tapestry segments, combined, include 26% of the population, but individually they each cover less than 2% of the population. Due to the limited population in each, they are not discussed separately. It is important to note that tapestry segments are often separated by slight social or economic nuances, even though their spending behaviors and preferences are generally aligned with others, and no unique socio-economic or consumer groups have been unrepresented by omission.

Chart 6
Regional Market Area
Tapestry Segments

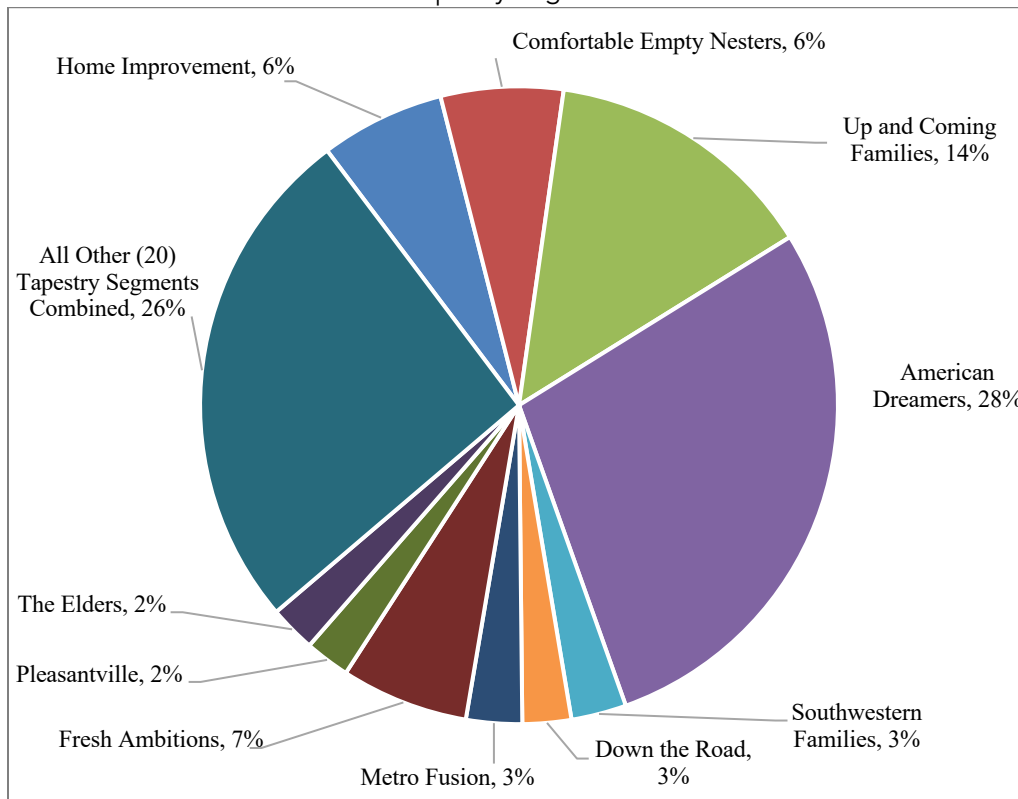


Table 12
Regional Market Area Tapestry Segmentation

	Within the Regional Market Area		Nationwide		
	Population 18+ Years	% of Total Population 18+ Years	Ave. Household Size	Median Age	Median Household Income
<p>American Dreamers</p> <ul style="list-style-type: none"> •Young families, many foreign born, Hispanic •Smartphones, video games, theme parks •Hard work, careful spenders on necessities 	45,863	28.4%	3.19	32.5	\$50,900
<p>Up and Coming Families</p> <ul style="list-style-type: none"> •Young, ethnically diverse, mobile, hard work •Sports, family activities, latest technology •careful shoppers, best deals, rely on internet 	22,464	13.9%	3.12	31.4	\$72,000
<p>Fresh Ambitions</p> <ul style="list-style-type: none"> •Young families, recent immigrants, poverty •Baby products, cell phones, trips back home •Price conscious, discounts, make ends meet 	10,443	6.5%	3.17	28.6	\$26,700
<p>Home Improvement</p> <ul style="list-style-type: none"> •Married couples, single parents, on-the-go •Home improvement, auto maintenance •Eat out regularly, cautious consumers 	10,200	6.3%	2.88	37.7	\$72,100
<p>Comfortable Empty Nesters</p> <ul style="list-style-type: none"> •Professionals transitioning to retirement •Physically active, sports •Prefer eating at home, home maintenance 	10,023	6.2%	2.52	48.0	\$75,000
<p>Metro Fusion</p> <ul style="list-style-type: none"> •Young diverse families, hard work, apt. bldg. •Trendy fashion, electronics, football, TV •Discount grocery, frozen meal, spend readily 	4,581	2.8%	2.65	29.3	\$35,700

Table 12
Regional Market Area Tapestry Segmentation

	Within the Regional Market Area		Nationwide		
	Population 18+ Years	% of Total Population 18+ Years	Ave. Household Size	Median Age	Median Household Income
<p>Southwestern Families</p> <ul style="list-style-type: none"> •Hispanic, multigenerational family, blue collar •Children’s products, food, clothing, TV •budget conscious, discounts, high unemploy. 	4,523	2.8%	3.20	34.6	\$30,400
<p>Down the Road</p> <ul style="list-style-type: none"> •Diverse, cultural traditions, mobile homes •Like fishing, hunting, video games, radio •Used vehicle, convenience store, quick meals 	3,989	2.5%	2.76	35.0	\$38,700
<p>The Elders</p> <ul style="list-style-type: none"> •Seniors, assisted living, informed, sociable •Apparel, books, newspapers, luxury sedans •High-quality, American products; coupons 	3,802	2.4%	1.68	72.3	\$42,800
<p>Pleasantville</p> <ul style="list-style-type: none"> •Professionals, affluent, older families •Sports, watching movies, shop online •Not cost-conscious, pay more for high quality 	3,684	2.3%	2.88	42.6	\$92,900

Source: Esri 2020

The three (3) tapestry segments with the highest population in the Regional Market Area are:

- American Dreamers (28.4% of all adults): young, diverse homeowners with multigenerational families. Many are foreign born of Hispanic origin. They spend carefully. Shopping and leisure expenditures are often focused on necessities and the needs of family members rather than the home itself, with products including baby items, children’s shoes and clothing, toys and games, and smartphones and electronic handheld devices.
- Up and Coming Families (13.9%): young, mobile, ethnically diverse families who work hard to get ahead. They are careful shoppers and are willing to shop around for the best deals. They rely on the internet for information and shopping and seek the latest and best

technology. They are busy with work and family and use home and landscaping services to save time. Spending priorities include family activities, sports, movies at home, and trips to theme parks, zoos, and other venues.

- Fresh Ambitions (6.5%): young families who are often recent immigrants, many of whom live in poverty. They are price-conscious and focused on making ends meet. Spending priorities include trips home to visit family and products for their children, including baby and child items, video games, and cell phones.

4.A.4. Retail Market Profile

Leakage/Surplus Analysis

An Esri Retail MarketPlace Leakage/Surplus Factor report was generated for the Regional Market Area that measures the balance between the volume of retail sales (supply) generated by existing retail businesses and the volume of retail sales potential (demand) produced by market area household spending on retail goods in the same industry. The data can be used to identify potential business opportunities in a geographic area.

“Leakage” in an area means that buyer demand exceeds supply in the market area. Retailers outside the market area are fulfilling the demand for retail products, and there is a potential opportunity for new or existing retailers in the market area to accommodate the excess demand there. “Surplus” in an area means that retail supply capacity exceeds the market area’s demand. This implies that retailers in the Regional Market Area are attracting shoppers that reside outside the market area, and brand positioning and product mix become important considerations.

A positive Leakage/Surplus Factor represents a market with some retail potential that is being lost to other areas; the closer the factor is to +100, the better the opportunity for retailers to capture more local demand. A negative Leakage/Surplus Factor represents a market with a surplus of retail sales compared to retail sales capacity in the market area; as the factor approaches -100, the proportion of sales volume to shoppers buying potential increases with fewer local shoppers. A Leakage/Surplus Factor of zero indicates a perfectly balanced retail market in which supply equals demand, or a trade area with neither excess capacity nor household demand.

Leakage/Surplus in the Regional Market Area

Leakage/Surplus findings for the Regional Market Area are shown in Table 13.

Table 13
Regional Market Area
MarketPlace Profile – Retail Leakage/Surplus, 2017

Type of Retail	Sales	Potential Sales	Leakage/ Surplus Factor	No. of Businesses
Retail Trade	\$2,254,330,971	\$1,956,940,526	-7.1	786
Vehicle & Parts Dealers	\$527,451,189	\$412,950,474	-12.2	112
Auto Dealers	\$421,013,456	\$327,513,976	-12.5	41
Other Vehicle Dealers	\$56,918,456	\$50,266,108	-6.2	15
Auto Part/Accessory/Tires	\$49,519,277	\$35,170,390	-16.9	57
Furniture/Home Furnishings	\$120,600,326	\$72,575,469	-24.9	48
Furniture Stores	\$96,636,628	\$37,768,498	-43.8	24
Home Furnishings	\$23,963,698	\$34,806,972	18.5	24
Electronics/Appliances Stores	\$71,648,537	\$71,657,318	0	34
Bldg./Garden Equip/Supply	\$126,069,656	\$121,159,451	-2	40
Bldg. Materials/Supplies	\$124,140,166	\$113,155,348	-4.6	34
Lawn/Garden Equip/Supply	\$1,929,490	\$8,004,103	61.2	6
Food and Beverage Stores	\$351,889,714	\$314,656,825	-5.6	96
Grocery Stores	\$327,296,205	\$269,430,181	-9.7	50
Specialty Food Stores	\$8,986,402	\$22,315,129	42.6	22
Beer/Wine/Liquor Stores	\$15,607,107	\$22,911,514	19	25
Health/Personal Care Stores	\$147,002,808	\$135,366,975	-4.1	82
Gasoline Stations	\$214,812,408	\$176,820,502	-9.7	52
Clothing/Accessories Stores	\$100,782,785	\$136,739,785	15.1	112
Clothing Stores	\$74,932,023	\$97,782,069	13.2	74
Shoe Stores	\$15,851,582	\$17,239,639	4.2	21
Jewelry/Lugg/Leather Goods	\$9,999,180	\$21,718,076	36.9	17
Sports/Hobby/Book/Music	\$68,003,299	\$61,170,641	-5.3	38
Sports/Hobby/Music Instrument	\$61,264,376	\$52,925,214	-7.3	36
Book Stores/News Dealers	\$6,738,923	\$8,245,428	10.1	2
General Merchandise Stores	\$451,692,033	\$324,913,109	-16.3	44
Dept Stores excl Leased Depts	\$393,391,058	\$193,107,595	-34.1	21
Other Gen Merchandise Stores	\$58,300,974	\$131,805,514	38.7	24
Misc. Store Retailers	\$69,290,690	\$72,694,339	2.4	109
Florists	\$1,860,410	\$3,324,623	28.2	10
Office Supply/Gift Stores	\$35,114,784	\$16,600,990	-35.8	30
Used Merchandise Stores	\$7,921,470	\$7,567,992	-2.3	18
Other Misc. Store Retailers	\$24,394,025	\$45,200,734	29.9	51
Non-store Retailers	\$5,087,526	\$56,235,641	83.4	18
E-Shopping/Mail-Order	\$3,514,017	\$48,928,156	86.6	9
Vending Machine Operators	\$0	\$874,645	100	0
Direct Selling Establishments	\$1,573,509	\$6,432,839	60.7	9

Table 13
Regional Market Area
MarketPlace Profile – Retail Leakage/Surplus, 2017

Type of Retail	Sales	Potential Sales	Leakage/ Surplus Factor	No. of Businesses
Food Service/Drinking Places	\$263,818,722	\$209,292,321	-11.5	359
Special Food Services	\$594,854	\$4,268,100	75.5	6
Drinking Places-Alcohol	\$1,643,916	\$4,364,956	45.3	10
Restaurants/Other Eating Places	\$261,579,952	\$200,659,264	-13.2	343

BLUE = positive Leakage/Surplus Factor, indicates leakage of sales to outside the market area

RED = negative Leakage/Surplus Factor, indicates surplus capture of sales within the market area

BLACK = Leakage/Surplus Factor at or close to zero (-10 to +10), indicates well balanced supply and demand

Source: Esri MarketPlace Profile

Surplus: The Regional Market Area is experiencing a surplus of sales in ten (10) retail sectors. Those sectors have negative L/S Factors and are shown in red in Table 13. They are capturing more sales than the Regional Market Area generates; therefore, they are attracting sales from households outside the Regional Market Area. The five (5) retail sectors with the greatest surpluses are:

- 1) Furniture Stores (L/S = -43.8)
- 2) Office Supply/Gift Stores (L/S = -35.8)
- 3) Dept Stores excl Leased Departments (L/S = -34.1)
- 4) Furniture/Home Furnishings (L/S = -24.9)
- 5) Auto Part/Accessory/Tires (L/S = -16.9)

Leakage: The Regional Market Area is experiencing market leakage in numerous retail sectors, and new or expanded business opportunities may exist in those sectors. They have positive L/S Factors and are shown in blue in Table 13. The closer the L/S Factor is to 100, the greater the opportunity for retailers to capture local demand.

One (1) retail sector has a L/S Factor equal to 100, indicating there are no stores or sales generated in the Regional Market Area. There may be good opportunities for such a retailer to capture sales in this sector:

- 1) Vending Machine Operator (L/S = 100)

The five (5) retail sectors with the highest L/S Factors (other than L/S Factor = 100) are listed below. In the Regional Market Area, demand for these goods exceeds supply, and potential sales are being lost to other retailers outside the market area. There may be good opportunities for more of these businesses in the market area:

- 1) E-Shopping/Mail Order (L/S = 86.6)
- 2) Non-store Retailers (L/S = 83.4)
- 3) Special Food Services (L/S = 75.5)
- 4) Lawn Garden Equip/Supply (L/S = 61.2)
- 5) Direct Selling Establishments (L/S = 60.7)

Balance: Retail segments in the Regional Market Area in which supply and demand are well-balanced have L/S Factors at or close to zero. The demand for such products is largely met by current suppliers. Those between -10 and +10 are shown in black in Table 13. The five (5) sectors with L/S factors closest to zero include:

- 1) Electronics/Appliances Stores (L/S = 0)
- 2) Bldg./Garden Equip/Supply (L/S = -2)
- 3) Used Merchandise Stores (L/S = -2.3)
- 4) Misc. Store Retailers (L/S = 2.4)
- 5) Health/Personal Care Stores (L/S = 4.1)

4.A.5. Market Opportunities

The Tapestry Segmentation analysis suggests there is demand in the Regional Market Area for sports equipment and family activities; family apparel; cell phones, video games, and other electronics; discounted household products; home improvements and maintenance supplies; and prepared, convenient meals. The existing supply of sports/hobby/book/music stores appears to be well balanced with demand (L/S = -5.3, L/S = -7.3), as does the existing supply of electronics/appliance stores (L/S = 0). However, there appears to be uncaptured sales in the following retail sectors:

- Specialty Food Stores (L/S = 42.6)
- Special Food Services (L/S = 75.5)
- Clothing Stores (L/S = 13.2)
- Clothing/Accessories Stores (L/S = 15.1)
- Lawn/Garden Equip/Supply (L/S = 61.2).

New or expanded opportunities in these markets may be appropriate in the Specific Plan area.

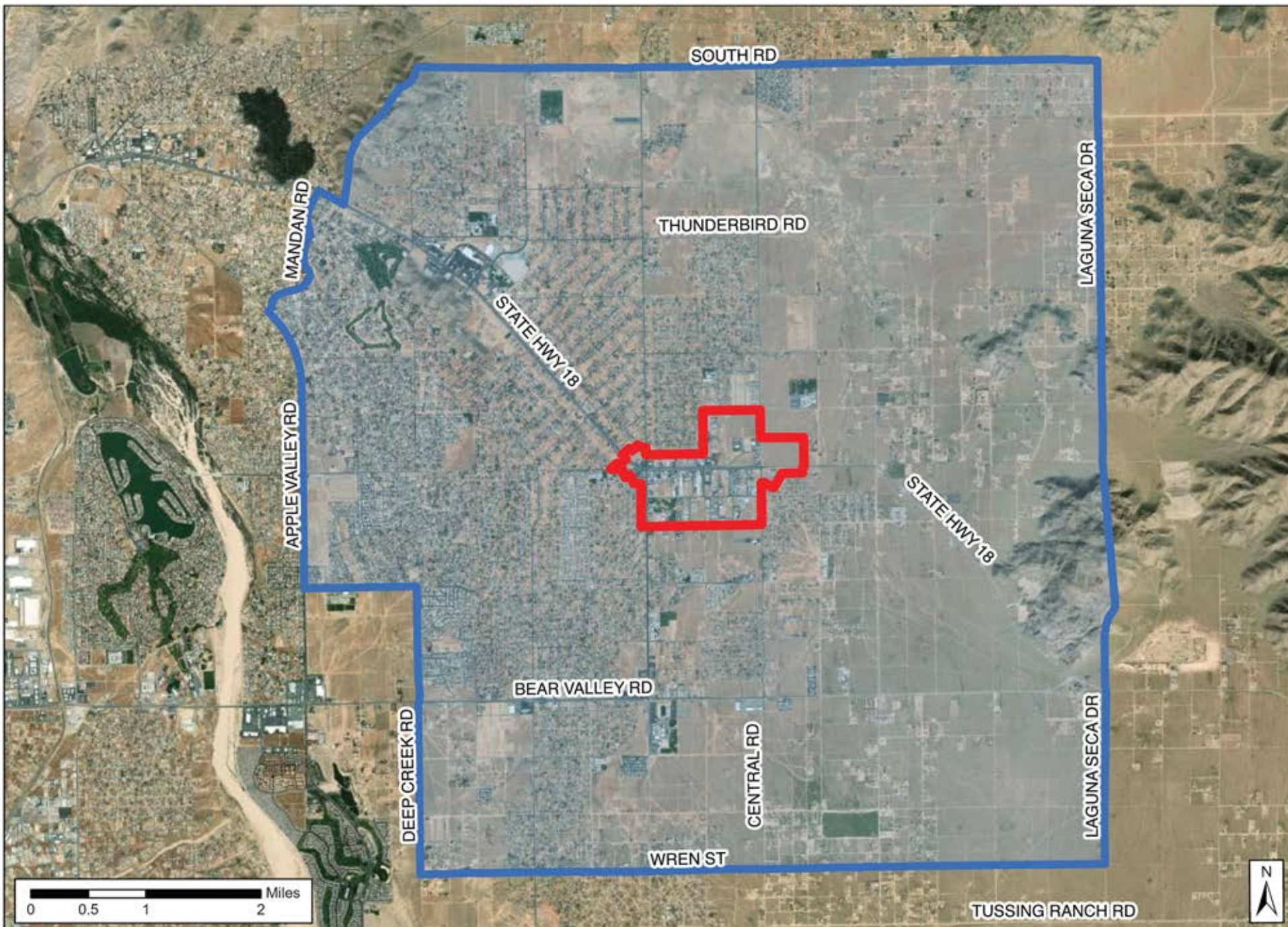
4.B. Local Market Area

4.B.1. Description

In addition to serving the retail and service needs of the regional drive-by market, the Specific Plan area serves the routine, day-to-day needs of local residents within and in proximity to the Specific Plan area. The following analysis describes current demographic, socio-economic,

consumer, and retail market characteristics in the Local Market Area. Data are from 2020/2025 Esri Updated Demographics, which is based on numerous demographic data sources and models described previously in Section 4.A.1.

The Local Market Area is contained entirely within, and therefore is a sub-set of, the Regional Market Area. It includes land within the Specific Plan boundary and within a ± 3 -mile radius of the Specific Plan area. Boundaries of the Local Market Area are shown in Exhibit 19 and generally defined as South Road on the north, Laguna Seca Drive on the east, Wren Road on the south, and Deep Creek Road/Apple Valley Road/Mandan Road on the west.



Source: Terra Nova Planning and Research; ESRI, 2021

9.7.21

4.B.2. Demographic and Socio-Economic Characteristics

Population

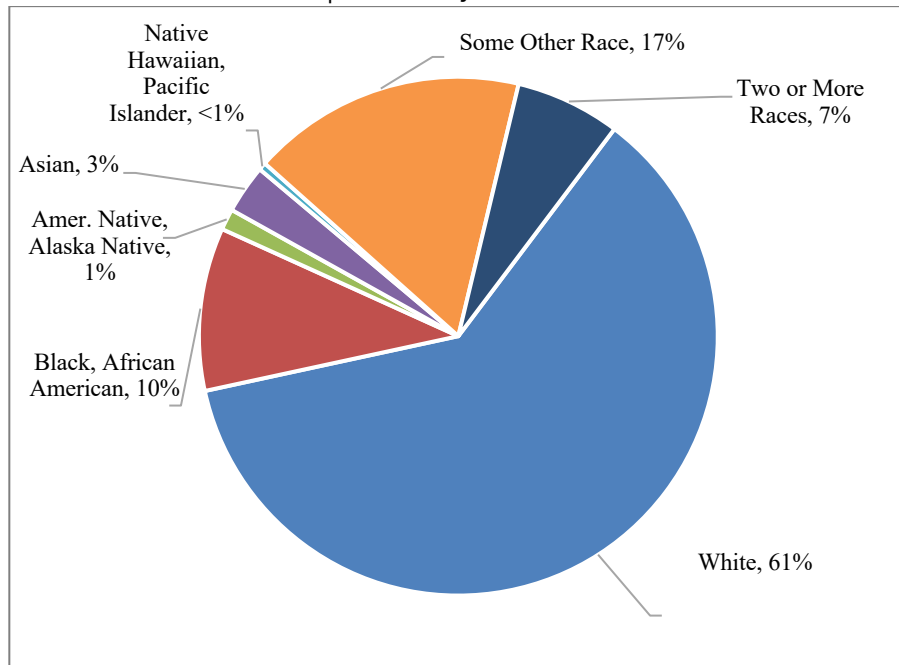
Population characteristics of the Local Market Area are summarized in Table 14. As shown, the 2020 population is 50,189. Approximately 49% is male and 51% is female. Approximately 74% is adults age 18+ years, and 26% is children under 18 years. The median age is 35 years. The population is projected to reach 51,700 by 2025.

As shown in Chart 7, the majority of residents (61.3%) categorize themselves as “White,” followed by “Some Other Race” (17%), “Black/African American” (10%), “Two or More Races” (7%), “Asian” (3%), “American Native/Alaska Native” (1%), and “Native Hawaiian/Other Pacific Islander” (less than 1%). Approximately 39.2% are Hispanic or Latino of any race.

Table 14
Local Market Area Population

2020 Population:	
Total Population	50,189
Age 18+	74%
Males	49%
Females	51%
Median Age	35 yrs.
2024 Projected Population:	
	51,700

Chart 7
Local Market Area
Population by Race, 2020



Housing and Households

There are 16,424 households in the Local Market Area. In 2018, there were 16,891 total housing units; most were single-family detached units (75.4%) and multi-family 2-4 units (13.9%) (Table 15). Approximately 8% of dwelling units are vacant. Approximately 58% are owner-occupied, and 34% are renter-occupied. The median home value is \$274,609, and median gross rent is \$1,034.

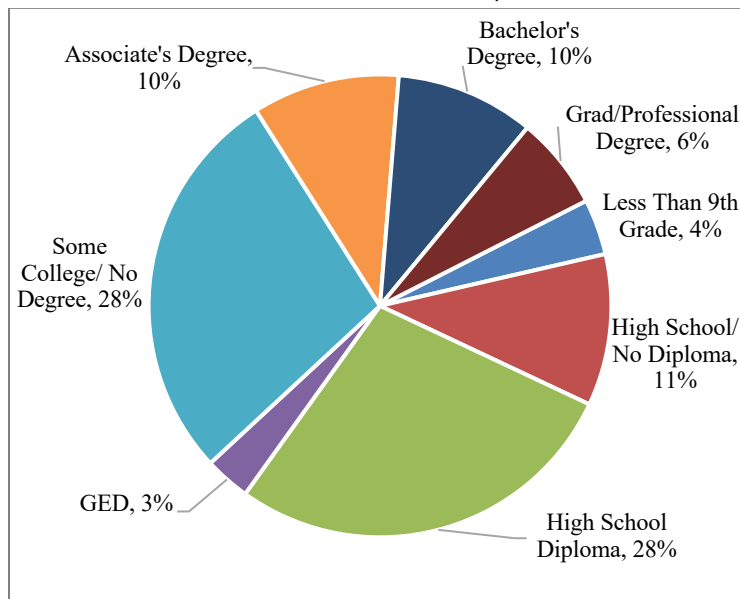
Table 15
Local Market Area
Housing Units, 2018

Unit Type	No. of Units	% of Total
Single-Family Detached	12,732	75.4%
Single-Family Attached	193	1.2%
Multi-Family, 2-4 units	2,356	13.9%
Multi-Family, 5+ units	661	3.9%
Mobile Homes	884	5.2%
Boat/RV/Van/etc.	65	0.4%
Total:	16,891	100.0%
Median Home Value, 2020:	\$274,609	
Median Gross Rent, 2020:	\$1,034	

Education

Educational attainment for residents age 25 years and over is shown in Chart 8. Most residents have a High School Diploma (28%) or Some College/No Degree (28%).

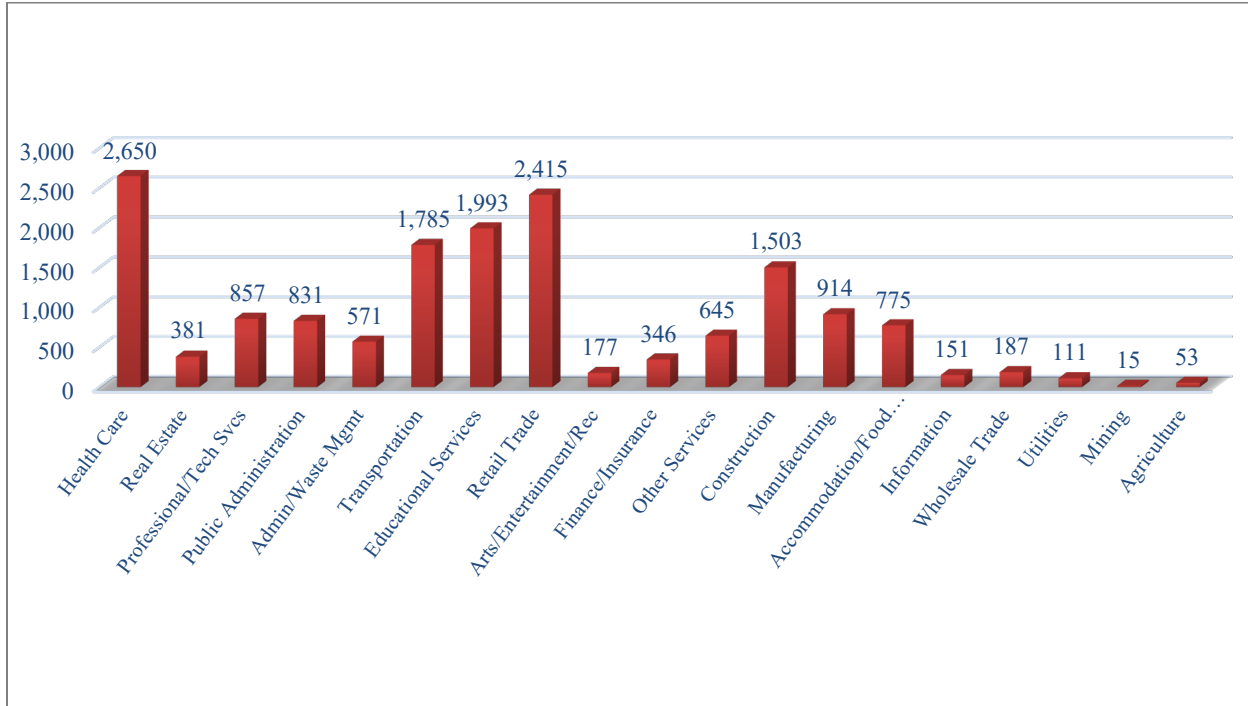
Chart 8
Local Market Area
Educational Attainment, 2020



Industry and Employment

The Local Market Area labor force includes 20,278 civilians age 16 and over, and 16,361 (80.7%) of them are employed. Chart 9 shows the number of residents employed in various industries. The largest employment sectors are Health Care (16.2% of all jobs), Retail Trade (14.8%), Educational Services (12.2%), and Transportation (10.9%).

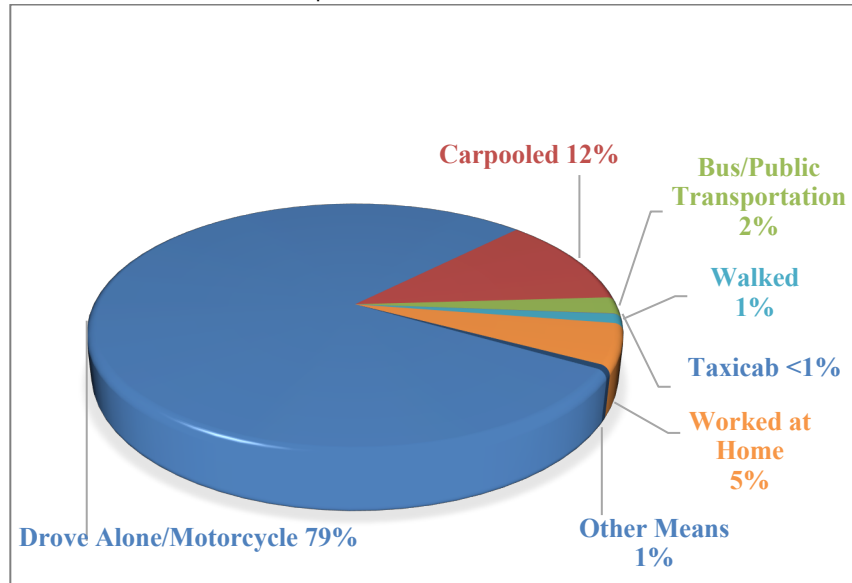
Chart 9
Local Market Area
Jobs by Industry, 2020



Transportation to Work

Nearly 80% of Local Market Area residents drive alone to work. The next most popular modes of transportation to work are Carpooling (12%) and Working At Home (5%). Other transportation methods, combined, account for only 4% of all trips to work.

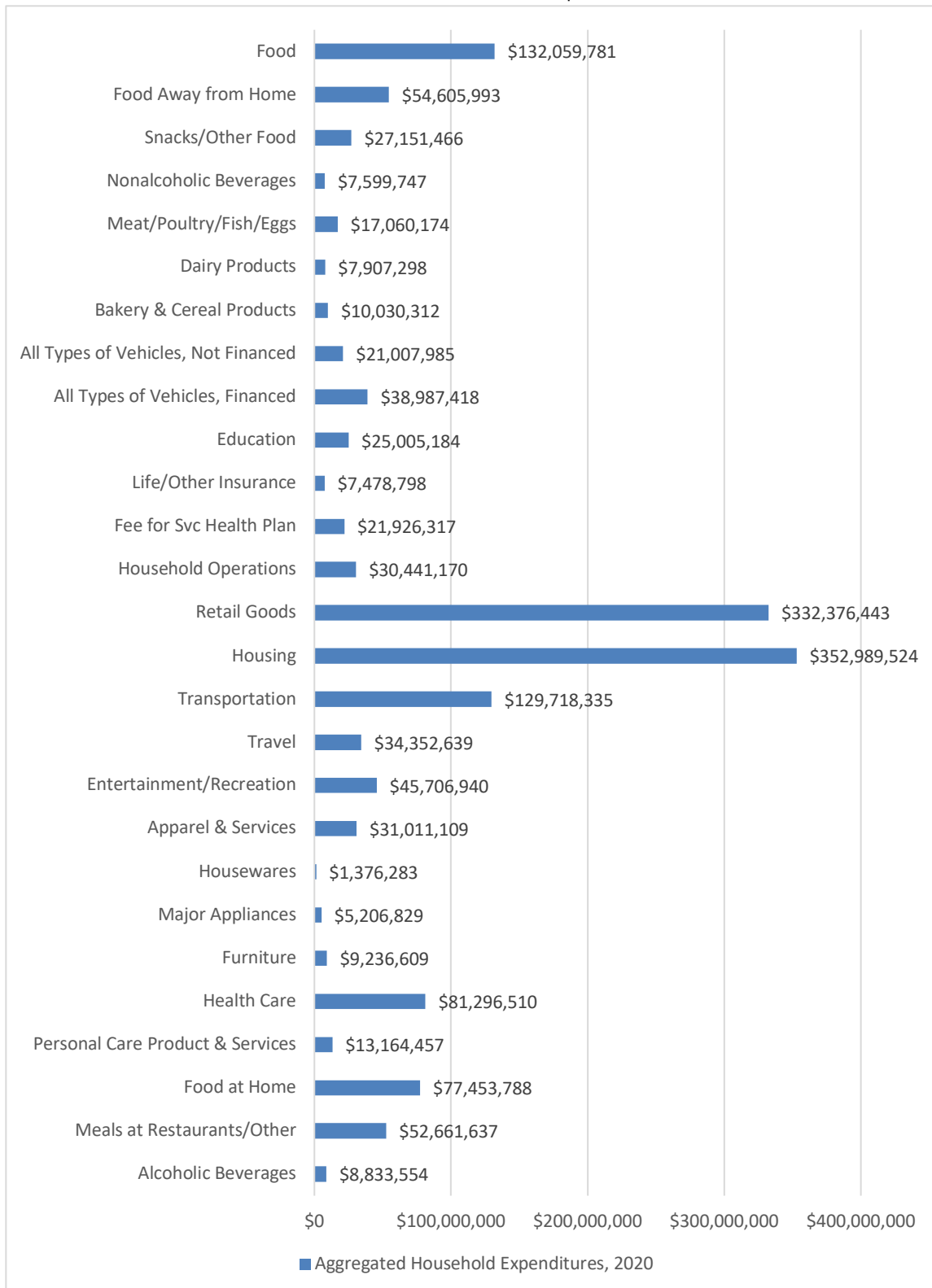
Chart 10
Local Market Area
Transportation to Work, 2018



Income and Spending

The 2020 median household income in the Local Market Area is \$54,873. Chart 11 summarizes the aggregated dollar amount spent, by category, by all households in the Local Market Area. As shown, the largest expenditures are for: 1) Housing, \$352.9 million, 2) Retail Goods, \$332.3 million, 3) Food, \$132.0 million, and 4) Transportation, \$129.7 million.

Chart 11
Local Market Area
Aggregated Annual Household Expenditures, 2020



4.B.3. Consumer Characteristics

Tapestry Segmentation

The Esri Tapestry Segmentation analysis that was performed for the Regional Market Area in Section 4.A.3 was also performed for the Local Market Area. Consumers in the Local Market Area fit the characteristics of 12 tapestry segments, or consumer groups, as described below in Chart 12 and Table 16.

Chart 12
Local Market Area
Tapestry Segments

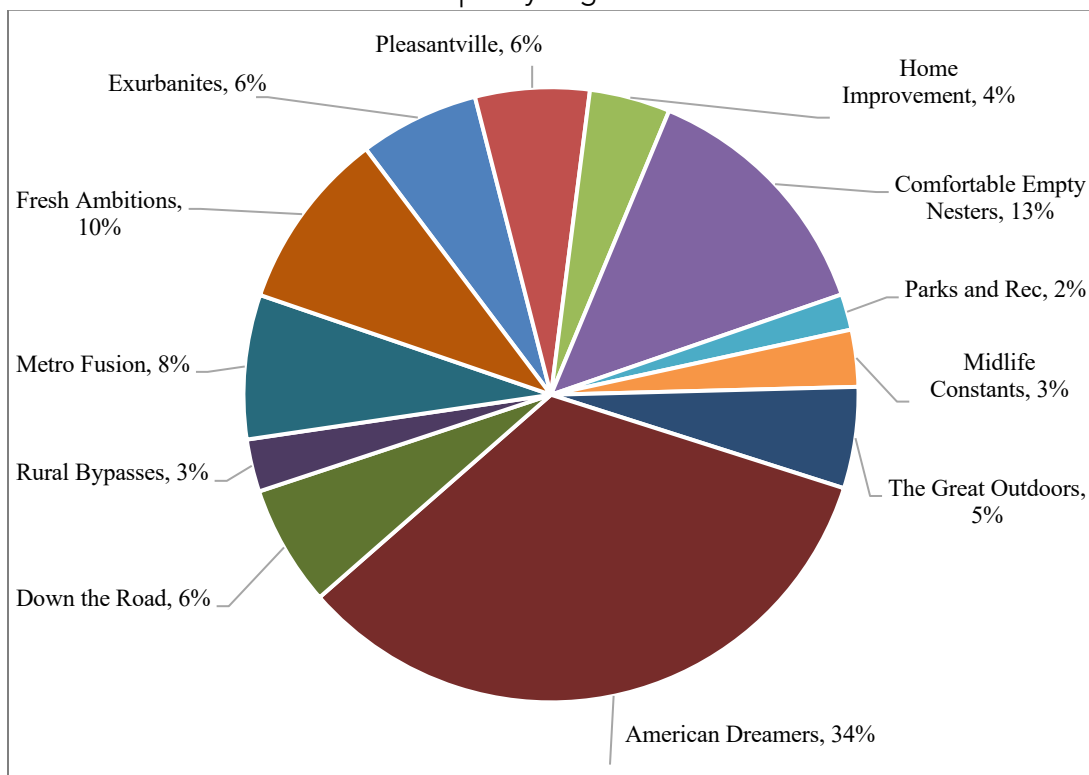


Table 16
Local Market Area Tapestry Segmentation

	Within the Local Market Area		Nationwide		
	Population 18+ Years	% of Total Population 18+ Years	Ave. Household Size	Median Age	Median Household Income
<p>Exurbanites</p> <ul style="list-style-type: none"> •College educated, beginning to retire •Social, hard-working, physically fit •Prefer quality over cost, shop via internet 	2,342	6.3%	2.50	51.0	\$103,400
<p>Pleasantville</p> <ul style="list-style-type: none"> •Professionals, affluent, older families •Sports, watching movies, shop online •Not cost-conscious, pay more for high quality 	2,234	6.0%	2.88	42.6	\$92,900
<p>Home Improvement</p> <ul style="list-style-type: none"> •Married couples, single parents, on-the-go •Home improvement, auto maintenance •Eat out regularly, cautious consumers 	1,579	4.2%	2.88	37.7	\$72,100
<p>Comfortable Empty Nesters</p> <ul style="list-style-type: none"> •Professionals transitioning to retirement •Physically active, sports •Prefer eating at home, home maintenance 	4,995	13.4%	2.52	48.0	\$75,000
<p>Parks and Rec</p> <ul style="list-style-type: none"> •Practical, kid-friendly, budget conscious •Attend movies, community park/rec, gyms •Shop at warehouse clubs, convenience foods 	702	1.9%	2.51	40.9	\$60,000
<p>Midlife Constants</p> <ul style="list-style-type: none"> •Traditional seniors, charitable, service groups •Movies at home, reading, fishing, golf •Prefer quality, natural, American products 	1,113	3.0%	2.31	47.0	\$53,200
<p>The Great Outdoors</p> <ul style="list-style-type: none"> •Empty nesters, active, modest lifestyle •Outdoor hobbies, DIY home & yard projects •Cost conscious, pet owners, 4WD vehicles 	1,981	5.3%	2.44	47.4	\$56,400

Table 16
Local Market Area Tapestry Segmentation

	Within the Local Market Area		Nationwide		
	Population 18+ Years	% of Total Population 18+ Years	Ave. Household Size	Median Age	Median Household Income
<p>American Dreamers</p> <ul style="list-style-type: none"> •Young families, many foreign born, Hispanic •Smartphones, video games, theme parks •Hard work, careful spenders on necessities 	12,508	33.6%	3.19	32.5	\$50,900
<p>Down the Road</p> <ul style="list-style-type: none"> •Diverse, cultural traditions, mobile homes •Like fishing, hunting, video games, radio •Used vehicle, convenience store, quick meals 	2,363	6.4%	2.76	35.0	\$38,700
<p>Rural Bypasses</p> <ul style="list-style-type: none"> • Country lifestyle, blue collar, high unemploy. •Gardening, hunting, fishing, magazines, faith •Discount department store, warehouse clubs 	1,027	2.8%	2.55	40.4	\$33,000
<p>Metro Fusion</p> <ul style="list-style-type: none"> •Young diverse families, hard work, apt. bldg. •Trendy fashion, electronics, football, TV •Discount grocery, frozen meal, spend readily 	2,821	7.6%	2.65	29.3	\$35,700
<p>Fresh Ambitions</p> <ul style="list-style-type: none"> •Young families, recent immigrants, poverty •Baby products, cell phones, trips back home •Price conscious, discounts, make ends meet 	3,519	9.5%	3.17	28.6	\$26,700

Source: Esri 2020

The three (3) tapestry segments with the highest population in the Local Market Area are:

- American Dreamers (33.6% of all adults): young, diverse homeowners with multigenerational families. Many are foreign born of Hispanic origin. They spend carefully. Shopping and leisure expenditures are often focused on necessities and the needs of family members rather than the home itself, with products including baby items, children’s shoes and clothing, toys and games, and smartphones and electronic handheld devices.
- Comfortable Empty Nesters (13.4%): suburban older householders transitioning from child-rearing to retirement. They are physically active and enjoy golfing, skiing, biking, and working out, and can be expected to purchase products supporting these interests. Home maintenance products and food stuffs for at-home meals are also a priority.
- Fresh Ambitions (9.5%): young families who are often recent immigrants, many of whom live in poverty. They are price-conscious and focused on making ends meet. Spending priorities include trips home to visit family and products for their children, including baby and child items, video games, and cell phones.

4.B.4. Retail Market Profile

Leakage/Surplus Analysis

An Esri Retail MarketPlace Leakage/Surplus (L/S) Factor report was generated for the Local Market Area in the same manner done for the Regional Market Area in Section 4.A.4. The report measures the balance between supply generated by retail businesses and demand produced by market area households for retail goods in the same industries. The data can be used to identify potential business opportunities in the Local Market Area.

Leakage/Surplus in the Local Market Area

Leakage/Surplus findings for the Local Market Area are shown in Table 17.

Table 17
Local Market Area
MarketPlace Profile – Retail Leakage/Surplus, 2017

Type of Retail	Sales	Potential Sales	Leakage/ Surplus Factor	No. of Businesses
Retail Trade	\$293,400,342	\$470,717,698	23.2	111
Vehicle & Parts Dealers	\$20,810,652	\$99,297,689	65.3	18
Auto Dealers	\$2,787,972	\$78,702,347	93.2	2
Other Vehicle Dealers	\$4,593,904	\$12,099,869	45.0	2
Auto Part/Accessory/Tires	\$13,428,776	\$8,495,473	-22.5	14
Furniture/Home Furnishings	\$1,090,251	\$17,316,932	88.2	2
Furniture Stores	\$636,600	\$8,995,886	86.8	1
Home Furnishings	\$453,651	\$8,321,045	89.7	1
Electronics/Appliances Stores	\$2,351,425	\$17,132,362	75.9	3
Bldg./Garden Equip/Supply	\$4,125,949	\$29,309,653	75.3	7
Bldg. Materials/Supplies	\$3,386,040	\$27,304,067	77.9	4
Lawn/Garden Equip/Supply	\$739,909	\$2,005,585	46.1	2
Food and Beverage Stores	\$77,567,141	\$75,784,732	-1.2	18
Grocery Stores	\$71,916,771	\$64,848,154	-5.2	10
Specialty Food Stores	\$312,386	\$5,363,991	89.0	2
Beer/Wine/Liquor Stores	\$5,337,984	\$5,572,588	2.2	6
Health/Personal Care Stores	\$26,398,358	\$32,860,250	10.9	12
Gasoline Stations	\$32,427,308	\$42,292,839	13.2	10
Clothing/Accessories Stores	\$931,315	\$32,818,741	94.5	3
Clothing Stores	\$931,315	\$23,457,617	92.4	3
Shoe Stores	\$0	\$4,094,015	100.0	0
Jewelry/Lugg/Leather Goods	\$0	\$5,267,109	100.0	0
Sports/Hobby/Book/Music	\$2,953,582	\$14,628,865	66.4	4
Sports/Hobby/Music Instrument	\$2,953,582	\$12,649,168	62.1	4
Book Stores/News Dealers	\$0	\$1,979,697	100.0	0
General Merchandise Stores	\$115,522,945	\$77,972,035	-19.4	10
Dept Stores excl Leased Depts	\$101,685,113	\$46,293,477	-37.4	4
Other Gen Merchandise Stores	\$13,837,832	\$31,678,558	39.2	6
Misc. Store Retailers	\$8,089,165	\$17,583,826	37.0	21
Florists	\$216,884	\$836,003	58.8	3
Office Supply/Gift Stores	\$2,803,586	\$3,970,351	17.2	2
Used Merchandise Stores	\$1,184,576	\$1,810,528	20.9	3
Other Misc. Store Retailers	\$3,884,119	\$10,966,945	47.7	14
Non-store Retailers	\$1,132,250	\$13,719,775	84.8	2
E-Shopping/Mail-Order	\$1,053,916	\$11,743,151	83.5	1
Vending Machine Operators	\$0	\$210,146	100.0	0
Direct Selling Establishments	\$78,334	\$1,766,478	91.5	1

Table 17
Local Market Area
MarketPlace Profile – Retail Leakage/Surplus, 2017

Type of Retail	Sales	Potential Sales	Leakage/ Surplus Factor	No. of Businesses
Food Service/Drinking Places	\$32,761,348	\$50,032,510	20.9	52
Special Food Services	\$0	\$1,023,285	100.0	0
Drinking Places-Alcohol	\$188,177	\$1,053,778	69.7	2
Restaurants/Other Eating Places	\$32,573,171	\$47,955,447	19.1	50

BLUE = positive Leakage/Surplus Factor, indicates leakage of sales to outside the market area

RED = negative Leakage/Surplus Factor, indicates surplus capture of sales within the market area

BLACK = Leakage/Surplus Factor at or close to zero (-10 to +10), indicates well balanced supply and demand

Source: Esri MarketPlace Profile

Surplus: The Local Market Area is experiencing a surplus of sales in three (3) retail sectors. Those sectors have negative L/S Factors and are shown in red in Table 17. They are capturing more sales than the Local Market Area generates; therefore, they are attracting sales from households outside the Local Market Area. Surpluses are occurring in:

- 1) Department Stores, excluding Leased Departments (L/S = -37.4)
- 2) Auto Part/Accessory/Tires (L/S = -22.5)
- 3) General Merchandise Stores (L/S = - 19.4)

Leakage: The Local Market Area is experiencing market leakage in numerous retail sectors, and new or expanded business opportunities may exist in those sectors. They have positive L/S Factors and are shown in blue in Table 17. The closer the L/S Factor is to 100, the greater the opportunity for retailers to capture local demand.

Five (5) retail sectors have L/S Factors equal to 100, indicating there are no stores and no sales generated in the Local Market Area. There may be good opportunities for these retailers to capture sales. They include:

- 1) Shoe Stores (L/S = 100)
- 2) Jewelry/Luggage/Leather Goods (L/S = 100)
- 3) Book Stores/News Dealers (L/S = 100)
- 4) Vending Machine Operators (L/S = 100)
- 5) Special Food Services (L/S = 100)

The five (5) retail sectors with the highest L/S Factors (other than L/S Factor = 100) are listed below. In the Local Market Area, demand for these goods exceeds supply, and potential sales are being lost to other retailers outside the market area. There may be good opportunities for more of these businesses in the market area:

- 1) Clothing/Accessory Stores (L/S = 94.5)
- 2) Auto Dealers (L/S = 93.2)
- 3) Clothing Stores (L/S = 92.4)
- 4) Direct Selling Establishments (L/S = 91.5)
- 5) Home Furnishings (L/S = 89.7)

Balance: Retail segments in the Local Market Area in which supply and demand are well-balanced have L/S Factors at or close to zero. The demand for such products is largely met by current suppliers. Those between -10 and +10 are shown in black in Table 17. They include:

- 6) Food and Beverage Stores (L/S = -1.2)
- 7) Grocery Stores (L/S = -5.2)
- 8) Beer/Wine/Liquor Stores (L/S = 2.2)

4.B.5. Market Opportunities

The Tapestry Segmentation analysis suggests there is demand in the Local Market Area for baby and children's clothing and shoes; baby products; video games and electronic devices, including cell phones; outdoor sports and recreation supplies; home maintenance and garden supplies; and discount and/or specialty food items. The Retail Marketplace analysis shows that there is uncaptured sales potential in the following retail sectors that match the items in demand:

- Clothing Stores (L/S = 92.4)
- Clothing/Accessories Stores (L/S = 94.5)
- Electronics/Appliances Stores (L/S = 75.9)
- Sports/Hobby/Book/Music Stores (L/S = 66.4 and L/S = 62.1)
- Bldg./Garden Equip./Supply (L/S = 75.3).

Therefore, new or expanded opportunities in these markets may be appropriate in the Specific Plan area.

4.C. Conclusions

The following retail segments have high or relatively high uncaptured sales potential (L/S factors) in both the Regional and Local Market Areas. There may be opportunities for such establishments to operate in the Specific Plan area.

Table 18
Retail Sectors with Largest Uncaptured Sales Potential
in Both Market Areas

Retail Sector	L/S Factor	
	Regional Market Area	Local Market Area
Lawn/Garden Equip./Supply	61.2	46.1
Specialty Food Stores	42.6	89.0
Jewelry/Luggage/Leather Goods	36.9	100.0
Non-Store Retailers	83.4	84.8
E-Shopping/Mail Order	86.6	83.5
Vending Machine Operators	100.0	100.0
Direct Selling Establishments	60.7	91.5
Special Food Services	75.5	100.0
Drinking Places - Alcohol	45.3	69.7

A comparison of the Regional Market Area and Local Market Area finds that:

- The Regional Market Area is experiencing balanced supply/demand in more retail sectors than the Local Market Area, including several specifically identified as appealing to the Tapestry Segments (i.e., sports equipment, electronics, building materials and supplies).
- There are uncaptured potential sales in numerous retail sectors in the Local Market Area. Retailers in the Specific Plan area may have greater and broader opportunities appealing to consumers in the Local Market Area than the Regional Market Area.

5. CULTURAL SETTING AND RESOURCES

Cultural resources are artifacts, objects, sites, buildings, structures, or natural features associated with past human activities. A cultural resources study was performed for the Village Specific Plan area in December 2020.¹⁰ It inventoried previously identified cultural resources in the area and evaluated the potential for undocumented resources to be encountered during future development. Its findings are summarized below.

5.A Cultural Setting

5.A.1 Archaeological Context

The prehistory of the Mojave Desert extends back to 8,000 B.C. or earlier when small, highly mobile groups of hunters and gatherers inhabited the region. Over time, foraging patterns and geographic range grew more restricted and population densities increased, but native subsistence continued to rely on gathering, hunting, and/or fishing. Today, archaeological sites in the Victor Valley area are typically related to subsistence activities and often contain fragments of metates, scrapers, and projectile points that suggest early inhabitants relied on seeds, plant pulp, and smaller game animals.

Present-day Apple Valley is located near the presumed boundary between the traditional territories of the Serrano and Vanyume peoples. The Vanyume disappeared well before 1900. The Serrano primarily settled on elevated hills and ridges where water emerged from the mountains. European contact may have begun as early as the 1770s. Between the 1810s and 1834, most of the Serrano people were removed to nearby missions. The remaining Serrano died or were displaced during punitive expeditions in 1866-1870. Today, many Serrano descendants are affiliated with the San Manuel Band of Mission Indians, Morongo Band of Mission Indians, or Serrano Nation of Indians.

5.A.2 Historical Context

The first known European visitor to the Victor Valley was Spanish explorer Francisco Garces in 1776. Euroamerican settlements began as early as 1860 but remained sparsely populated until the second half of the 20th century. The first permanent settlement in present-day Apple Valley was a cattle ranch called Rancho Verde and established in 1870. Completion of the Santa Fe Railway in the 1880s helped facilitate the peak of settlement activities that were centered around dude ranches and apple orchards, during and after the 1910s.

¹⁰ "Historical/Archaeological Resources Sensitivity Assessment, The Village Specific Plan and EIR, Town of Apple Valley," CRM TECH, December 31, 2020.

Sustained growth in the Victor Valley began in the post-World War II era, in part due to the marketing campaigns of Newton Bass and Bud Westlund who sold thousands of residential and commercial properties with the vision of creating a new town named Apple Valley Ranchos. The Town of Apple Valley was incorporated in 1988 with a population of approximately 41,000.

The Village Specific Plan area remained largely undeveloped and in a natural state until the 1940s and 1950s, when modest commercial buildings, rural residential properties, and mobile home parks emerged. Prior to that, the only manmade feature in or near the Specific Plan area was a road leading to the Big Bear Valley in the San Bernardino Mountains, which became present-day Highway 18. Growth accelerated between 1952 and 1969 to include a new community center and fire station.

5.B Cultural Resources

5.B.1 Archaeological Resources

Known prehistoric sites in inland southern California regions, including the Victor Valley, typically occupy sheltered areas on or near hills, elevated terraces, and ridges near reliable sources of water. Given the general location of the Village Specific Plan on the open valley floor and several miles from the Mojave River and prehistoric dry lakes, it is unlikely that the Specific Plan area provided favorable conditions for long-term use by Native populations in prehistoric times.

A records search of the South Central Coastal Information Center (SCCIC), the official cultural resource records repository for San Bernardino County, identified no prehistoric or early historic cultural resources within the Village Specific Plan area or within a one-quarter mile radius.

A search of the Sacred Lands File by the Native American Heritage Commission (NAHC) found the presence of unspecified Native American cultural resource(s) in the vicinity of the Specific Plan area; however, the nature and location of the resource(s) were not disclosed. The NAHC recommended contacting the Chemehuevi and other Native American tribes for additional information; further consultation would be required under the California Environmental Quality Act (CEQA) in conjunction with analysis of future development proposals in the Specific Plan area.

The December 2020 cultural resources field survey conducted in the Village Specific Plan area yielded no potential indicators of prehistoric human use.

5.B.2 Historic Resources

Historic cultural resources are manmade features associated with human activity that occurred during the historic period generally extending from the beginning of European settlement to 50 years ago. Buildings and structures built as late as 1970 meet the current age threshold of a

potential “historic resource.” According to PRC §5020.1(j), a historical resource “includes, but is not limited to, any object, building, site, area, place, record, or manuscript which is historically or archaeologically significant, or is significant in the architectural, engineering, scientific, economic, agricultural, educational, social, political, military, or cultural annals of California.” According to CEQA guidelines, historic resources include those listed or eligible for listing in the California Register of Historical Resources, included in a local register of historical resources, or determined to be historically significant by the lead agency (Title 14 CCR §15064.5(a)(1)-(3)).

Recorded Sites

Two sites of historic origin within the Village Specific Plan area have been recorded in the California Historical Resources Information System: 1) Chief Desert Lodge (circa 1947), which included six two-unit bungalows and a caretaker’s residence at the northwest corner of Highway 18 and Navajo Road, all of which have been demolished, and 2) a refuse scatter associated with building remains north of Fire Department Station No. 1 on Headquarters Drive. Neither was determined to be eligible for the National Register of Historic Places or California Register of Historic Resources at the time of its recordation.

Locally Designated Historical Points of Interest

Three sites within the Specific Plan boundaries have been designated as Historical Points of Interest by the Town of Apple Valley:

- El Pueblo Shops (21810 Outer Highway 18 North):
Built in the late 1940s; two strip-type buildings facing one another with a lawn in between; currently occupied by a variety of shops and businesses, among them a restaurant, dress shop, beauty parlor, and dentist.
- Conrad Publishing House (21825 Outer Highway 18 South):
Original portion of the building was built by Warren White in 1951 for Lloyd R. Conrad’s printing and publishing business.
- James A. Woody Community Center (13467 Navajo Road):
Constructed between 1950-1951 by community volunteers and financed through the formation of a Community Services District and fundraisers; several additions were added later; currently used by the Town’s Parks and Recreation Department for classes and activities and is available to rent for banquets, receptions, and other events.

Infrastructure

Some infrastructure features that cross through the Village Specific Plan area date to the historic period (more than 50 years of age) and may have been recorded as cultural resources elsewhere due to their long history or potential association with historical events. Among these are Highway 18, secondary roads, and major power transmission lines. However, over time, the integrity of these features may have been diminished such that they are not likely to be found historically significant. Under CEQA, the significance of these features would need to be evaluated in conjunction with future project proposals.

6. REFERENCES

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