CITY OF SAN JACINTO

“An environment of business opportunities and affordable housing – new and existing”

Researched for:

SOUTH RIVERSIDE COUNTY, CALIFORNIA

Contact:
Tara Magner
Economic Development & Special Project Administrator
951.487.7330 Ext. 359
tmagner@sanjacintoca.gov

Demographic Marketing Report

Researched and Prepared By:

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Derrigo Demographic Studies
760.310.9904
www.derrigostudies.com
Purpose of Report:

Derrigo Studies is a consulting firm with over thirty years of experience in land development advisory on commercial and residential uses. This report summarizes our findings relative to updated demographic characteristics for the City of San Jacinto, see page 7 – Vicinity Map. For accuracy and visual aid, please see full-size illustrations referenced throughout this report and included in this analysis, pages 7 through 9.

SUMMARY OF FINDINGS

Completed for THE CITY OF SAN JACINTO, the project is to analyze existing and planned residential projects along with major anchor retail within the study area. Key results of our research for San Jacinto’s City Limits are listed below:

- Commercial and industrial opportunities are more available now in San Jacinto than ever. Numerous opportunities are in process throughout the city. These opportunities partially include a Dollar Tree planned at the NWC Sanderson Avenue and Esplanade Avenue. Now under construction is Habit Burger and Tommy’s Car Wash on the west side of San Jacinto Avenue and north of Esplanade Avenue. Estudillo Plaza Retail Center has 7-Eleven in operation and will add McDonald’s with drive-thru, a carwash and a 10,000 square foot tenant. In addition, entitlements are in place for a Charter School for a K-12 campus to accommodate 2,000+ students.

- The City of San Jacinto is poised to grow with a strong economy while having over 5,367 residential units in the development pipeline. Residential activity is occurring throughout the city (an additional 18,687 people or a 32.5% increase in population at build out of all currently active units). See below for trade area statistics:

<table>
<thead>
<tr>
<th>DEMOGRAPHIC CHARACTERISTICS</th>
<th>SAN JACINTO CITY LIMITS</th>
</tr>
</thead>
<tbody>
<tr>
<td>MARCH 2022 UPDATED POPULATION</td>
<td>57,356</td>
</tr>
<tr>
<td>MARCH 2024 PROJECTED POPULATION</td>
<td>59,285</td>
</tr>
<tr>
<td>TOTAL POPULATION AT BUILD OUT OF ALL ACTIVE RESIDENTIAL UNITS</td>
<td>76,043</td>
</tr>
<tr>
<td>AVERAGE PERSONS PER HOUSEHOLD (2022)</td>
<td>3.48</td>
</tr>
<tr>
<td>MEDIAN HOUSEHOLD INCOME (2022)</td>
<td>$59,964</td>
</tr>
<tr>
<td>MEDIAN VALUE OF HOUSING (2022)</td>
<td>$468,589</td>
</tr>
</tbody>
</table>

For details on how we arrive at our estimates, please reference Chapter III, page 10.

- To improve access to the San Jacinto Valley, the Riverside County Transportation Commission has plans to complete two additional access points: Highway 79 from Domenigoni Parkway and Gilman Springs Road and the Mid County Parkway 74 from the City of Perris to San Jacinto (first segment to be completed by Summer 2022).
City of San Jacinto:

The City of San Jacinto, with a growing population of over 57,000, is in the northern portion of the San Jacinto Valley in Riverside County, southern California. San Jacinto City covers over 30 square miles of the valley floor and is just 12 miles south of the Banning / Beaumont Valley (roughly 83,000 people). The region is 12 miles east of Menifee, 17 miles north of the Temecula wine country and 44 miles west of Palm Springs and other desert cities. As a growing community to western Orange County and Northern San Diego County, San Jacinto is home to over 16,400 housing units, the Mt. San Jacinto College, San Jacinto High School (approximately 2,741 students) and the Soboba Casino, pictured below, attracts roughly 2.4 million annual visitors (per Pacer.ai).

With the improved economy, many of these projects are moving forward bringing new residents to the area on a monthly basis. KB Home and S & G Homes are selling units at their communities Eagle’s Crest at The Cove and Sandalwood (624 total units at build out).

Riverside County Transportation Commission (RCTC) recognizes this projected approved growth will need improved access to the San Jacinto Valley and has plans to expand and realign SR-79 from Domenigoni Parkway and Gilman Springs Road. This improvement will provide a more direct north-south route through the San Jacinto Valley (EIR completed, funding still needed).

A second roadway improvement that will increase the convenient access to San Jacinto is the “Mid County Parkway 74” project connecting San Jacinto to Perris via a six-lane artery. This $1 billion, 16-mile roadway has Segment 1 under construction to complete a new interchange at Interstate 215 and Placentia Avenue. Segment 1 is anticipated to be open by Summer 2022. Segment 2 will complete a three-mile section of the Mid County Parkway between Redlands Avenue in Perris and Ramona Expressway in San Jacinto (award construction contract in
spring 2022). If funding can be secured, construction could begin in mid-2024. Note the location of the Mid County Parkway and SR-79 realignment highlighted in “pink” on aerial below.

Existing Demographics:

The aerial on page 8, snapshot below, breaks down the San Jacinto’s City Limits into Sectors (Sectors in “yellow” with city limit boundaries highlighted in “blue”). Existing demographic statistics are outlined for each Sector including population, number of housing units, average persons per household, median household income and median value of housing. By breaking down San Jacinto’s City Limits, Derrigo Studies can provide the most accurate demographic numbers possible including a median household income estimate of $59,964 and median value of housing estimate of $468,589. Both of these stats will continue to increase as growth takes place in the region. For a detailed breakdown of figures used, see Chapter III, beginning on page 10.

To get an idea of the ethnicity makeup for the City of San Jacinto, the following breakdown applies per the 2020 Census; White 28.9%, Hispanic 56.7%, Black or African American 7.2%, Asian 3.6% and others 3.6%.

Anchor Retailer Environment:

Anchor retailer locations are highlighted with “red” numbers on this aerial illustration, full size on page 9. San Jacinto retail centers are primarily located along three major roadways; San Jacinto Avenue, Ramona Expressway and Sanderson Avenue. At the intersection of San Jacinto Avenue and Esplanade Avenue, four commercial centers are in operation (numbers
Featured anchor retailers include Cardenas, Family Dollar at 4 (O’Reilly Auto Parts across street); Stater Bros, Regal Cinemas at 5; (Auto Zone across street); Rite Aid, Aldi at 6; Walmart Supercenter, Walgreens at 7. Dollar General, also located along San Jacinto Avenue, is located at number 3. Just south of Mt. San Jacinto College, Stater Bros is at 1 with an adjacent Rite Aid and Dollar Tree at 2. In the western portion of San Jacinto, CVS is with Auto Zone at number 8 while Walgreens is featured at 9.

Proposed anchor retailers in San Jacinto include a planned Dollar Tree at 10. Shop and pad retailers coming soon include Tommy’s Car Wash, The Habit Burger, Dutch Bros Coffee and Popeyes Louisiana Kitchen. Overall, a total of 10 existing or proposed centers are located within the study area. A detailed listing of anchor tenants in each center is outlined on aerial’s legend.

Residential Activity:

Once again, the above aerial is utilized. This time to display residential activity including 46 tentative tract maps and 4 specific plans active in the study area, full size on page 9. Three communities currently have 38 units under construction. The KB Home project mentioned earlier is at number 2, “Eagle’s Crest at The Cove”. Eagle’s Crest is the last neighborhood to be constructed in The Cove for 498 total units. At number 4, Sandalwood is underway by S & G Homes. This community is wrapping up its final 14 homes. Next development to come online is at number 5. DR Horton is grading their newest addition to San Jacinto in a project with 126 units approved and coming soon! Another development anticipated to record in March 2022 is at number 36, “Monte Vista” by Monte Vista Homes which has been approved to complete 35 units. Per San Jacinto Planning Department, numerous new tentative tract maps have been recently submitted to the city and are currently going through the development process (representing over 800 units).

The specific plans are outlined in “white” on the above aerial. The Cove is almost completed and the other three, Esplanade, The Villages and The Trails all have maps within them. The Trails is the furthest along with traffic studies and condition compliance in process.
All residential activity represents roughly 6,116 units (5,367 are in San Jacinto City Limits). To get an idea of projected build out rates, see the chart on following page (details on each residential project are in Chapter IV, page 13).

<table>
<thead>
<tr>
<th>Trade Area</th>
<th>2022 Population</th>
<th>2 Year Unit Build Out</th>
<th>2 Year % Increase</th>
<th>2024 Projected Population</th>
<th>Additional Active Units to be Built</th>
<th>Built Out % Increase</th>
<th>Total Population at Build Out of All Active Units</th>
</tr>
</thead>
<tbody>
<tr>
<td>San Jacinto City Limits</td>
<td>57,356</td>
<td>554</td>
<td>3.3%</td>
<td>59,285</td>
<td>4,813</td>
<td>32.5%</td>
<td>76,043</td>
</tr>
</tbody>
</table>

Methodology:

The following three items outline details on how we arrive at our estimates:

(1) **DEMOGRAPHIC AERIAL ILLUSTRATION:**

**DEMOGRAPHIC DATA** - Broken down by Sectors, this data consists of estimated updates on population, number of housing units, average persons per household, median household income and finally median value of housing. All of this data is estimated and gathered in several different ways depending on the area that is being studied. For details on how Derrigo Studies arrives at these figures in this study, please reference "Basis of Estimates" at the end of this report.

(2) **SUBDIVISION ACTIVITY AERIAL ILLUSTRATION:**

**RESIDENTIAL SUBDIVISION ACTIVITY** - This information is gathered from the respective planning departments. In addition, Derrigo Studies called approximately 75% - 95% of the residential developers with active subdivisions within the subject area. The purpose of this data is to forecast how many more people will be living in the area in the future. The Subdivision Activity Illustration shows all active residential developments with a status of Design Plan Check to Recently Built. To define the status, look at the color of tape with which the subdivision is outlined. The status and respective tape color are defined on the "Legend" located on the Subdivision Activity Aerial Illustration. In addition, a number is outlined in each subdivision. To review more data on each subdivision, simply match the number with its appropriate tag also located on the Subdivision Activity Aerial Illustration.

Specific Plans on this illustration are outlined in white and labeled. Specific Plans are large residential developments. The residential units in these developments are broken down into several categories and are listed in the Specific Plan section of this report. Retail competition and major road extensions are also displayed on this aerial illustration.

(3) **TRADE AREA ANALYSIS AND SUBDIVISION ACTIVITY LISTING:**

**RESULTS OF STUDY** - This section ties together all the data on the Demographic Aerial Illustration and the Subdivision Activity Aerial Illustration to produce concrete existing and future population figures. On the “Existing Demographic Chart” data is displayed on the Demographic Aerial Illustration. This analysis is completed on each area and calculates an updated population estimate for each trade area. Also calculated per area is the number of housing units. With respect to average persons per household, median household income and median value of housing, this analysis outlines averages for each area. To define which area is being analyzed, reference the boxed area at the top of the chart.
The next chart is the “Future Population Chart”. On each area there is both an “Existing Demographic Chart” and a “Future Population Chart”. The two tie together in the following manner - Column 5 on the Existing Demographic Chart provides an updated estimated population number for the subject area. By taking this number over to Column 4 on the Future Population Chart, we can now move forward in defining further population growth.

The Future Population Chart essentially breaks down the data displayed on the Subdivision Activity Illustration. By calculating the number of dwelling units that fall within each area, we can determine how many units will be built.

To understand what type of units are used to arrive at future population estimates, please reference the “Basis of Estimates” at the end of this report. We have found that this calculation must be tailored to the particular city or region that is under analysis.

The final section of this report is called the “Subdivision Activity Listing”. Basically, this section gives details on residential subdivisions that are outlined on the Subdivision Activity Aerial Illustration. Please note, the subdivisions in this report have aerial location numbers, so easy reference is made to the specific location on the Subdivision Activity Aerial Illustration. As mentioned earlier, Derrigo Studies called a majority of residential developers active in the subject area. The details of these conversations are found in this section and are often helpful in understanding the potential growth outlined in this study.