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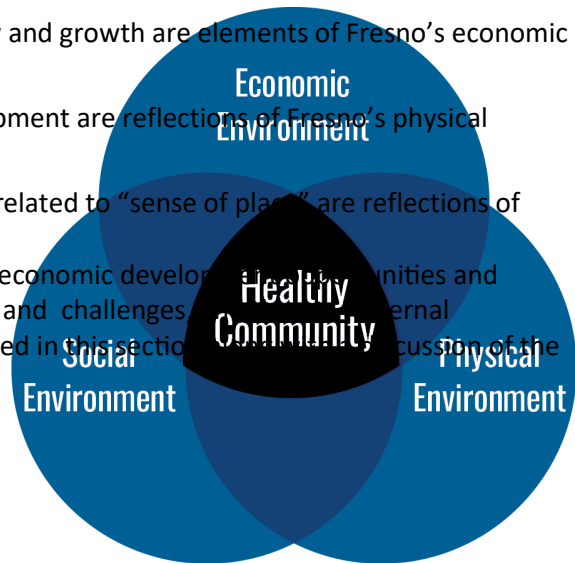
SWOT Analysis

This assessment of the city's strengths (assets) weaknesses and threats (challenges) is a culmination of data and trends analysis presented in the Economic Conditions Report (Appendix B), review of background documents, community surveys, and personal interviews with community stakeholders.

The high-level goal of the Fresno CEDS is to balance the economic, social and physical environments that support an economically healthy community. These environments are connected and influence each other. For example,

- workforce talent, education, and business diversity and growth are elements of Fresno's economic environment
- infrastructure, transportation, and land for development are reflections of Fresno's physical environment
- housing, population dynamics and other features related to "sense of place" are reflections of Fresno's social environment

Combined, these factors influence and define the city's economic development opportunities and ultimate success. The strengths and assets, weaknesses and challenges (internal and external challenges) of each of these three elements are presented in this section. This section includes a discussion of the significance to economic development.



Strengths and Assets

Strengths and assets are tangible and intangible assets a community has and can offer business. They set a community apart and give it a competitive advantage over its competition. Below is a discussion of the City of Fresno's assets and advantages and the significance to economic development.

Economic Environment	Significance
<p>Stability. Fresno is economically stable; city finances are strong with good reserves.</p>	<p>A safe and secure community depends on a fiscally healthy government that can provide the public services needed by the community with a balance of revenues and costs over time, even if the community changes, or is faced with economic, natural, or political risks.</p>
<p>Cost. Favorable cost of living compared to the state.</p>	<p>Lower cost of living is a positive sign for residents, new businesses, and entrepreneurial growth.</p>
<p>Entrepreneurs. Strong entrepreneurial spirit is evidenced by the small business incubators and many sources of technical and financial assistance provided by local organizations including, but not limited to:</p> <ul style="list-style-type: none"> California State University Fresno's Water, Energy, Technology (WET) Center The Pi Shop Vision View Fresno Area Hispanic Foundation FUSD's Patino School of Entrepreneurship Asian Business Institute & Resource Center 	<p>Entrepreneurship improves standards of living and creates wealth for the entrepreneur and related businesses (suppliers). This wealth is most often kept within the community as locally owned businesses are more likely to contribute to community projects, support local charities, youth sports, etc.</p>
<p>Business and Industry. Between 2011 and 2021, Fresno's traded sector (businesses that export products and services, and import dollars, e.g. ag, manufacturing) grew both in jobs (2.9%) and in Gross Regional Product (GRP) (5.7%).</p> <p>The local or population-serving businesses (grocery, personal services, government, etc.) experienced similar growth in jobs (2.4%) and in GRP (5.5%).</p> <p>Visitor serving businesses (lodging, portions of retail, food services, entertainment) experienced job growth of (1.4%) and GRP is (0.6%).</p>	<p>Positive growth in each industry sector, especially during recent economic shocks, is good news and an indicator of overall economic strength and resiliency.</p>

<p>Job Growth. Historic job growth (2011-2022) by industry sector shows: 1) Goods producing jobs experienced 3.22% growth (71% of jobs); 2) Local serving jobs experienced 3.54% growth (19% of jobs); and 3) Visitor serving jobs experienced 2.02% growth (10% of jobs)</p>	<p>A higher share of employment in goods producing jobs is positive due to the economic impact derived from higher skilled/higher wage jobs associated with this sector.</p>
<p>Talent Development. There is excellent local access to post secondary education (CSUF, Fresno City College, etc.). Fresno shows a commitment to career technical education (CTE) schools (Patino, CART, etc.), dual enrollment, certificate and licensing programs for in-demand occupations. The Fresno Regional Workforce Development Board's 2023 Biennial Modification to the Local Plan prioritizes a commitment to career pathways in programs and services.</p>	<p>Employers seek an existing educated and skilled workforce and assurance of a continuous pipeline of skilled labor.</p> <p>Established linkages between primary and post secondary educational institutions and workforce demonstrates a recognition of the importance of skilled labor to business success and the local economy.</p>
<p>Talent Development. Fresno students' educational attainment from less than 9th grade to AA degrees is slightly better than the state, however, lags behind the state in percent of students that obtain a BS or graduate or professional degree.</p>	<p>Educational attainment is important to employers who seek an educated and skilled workforce. Educational attainment includes not only degrees from two and four year colleges and universities, but also the attainment of licenses and certificates for specialty trades and occupations.</p>
<p>Commute. A majority (73.9%) of City of Fresno employed residents aged 16+ work in the city. Most of the remaining workers are employed within the county or nearby cities of Clovis, Madera, or Sanger. The mean travel time is just 22 minutes.</p>	<p>New prospective businesses would be encouraged by indications of an easily accessible labor pool. A significant number of out-commuters would force businesses to look outside the city to attract workers.</p>
<p>Income. The median household income in the city experienced a 10-year average annual increase of 0.71% which is more than Fresno County (0.23%) or the State of California (0.68%).</p>	<p>Median household income is a measure of how families are doing financially.</p>
<p>Source of Income. The share of personal income from earned wages is unchanged from 2017 to 2021 (79%). Small changes in the source of income in the city are 1) a slight increase in the share coming from retirement (14% to 17%); and 2) a slight decline in the share from public assistance (10% to 8%).</p>	<p>Wages play a major role in the economy by giving workers spending power. This refers not only to the money workers earn that they spend on necessities, but also the money they save or use in the short term for consumer goods, recreation, travel and investing.</p>

Physical Environment	Significance
<p>Location and Market Access. Transportation network includes an international airport, state highways (99, 180, 41), access to interstate highway (5) within 50 miles, freight rail, high speed rail (HSR) is under construction.</p>	<p>Air service generates a tremendous amount of economic activity and is a driver for attracting investment, business, and tourism.</p> <p>Transportation services also generate employment and provide mobility for citizens. HSR (when completed) will provide similar benefits as air service. The highway network is essential for both personal and business use.</p>
<p>Broadband. The City continues to pursue the expansion of small cell 5G sites to include disadvantaged communities; Central Valley Independent Network (CVIN) connects public buildings; the City received funding for last mile improvements; ongoing upgrades and expansions including master planning for citywide fiber.</p>	<p>A strong communications network and closing the gap on the digital divide ensures that residents, businesses, and visitors have access to the latest technology and, therefore, access to city government, public services, education, and safety.</p>
<p>Infrastructure. \$342M investment of public funds for citywide infrastructure improvements (\$250M), downtown (\$44M), and historic train depot (\$30M).</p>	<p>Good infrastructure supports economic growth by raising productivity levels, reducing costs, expanding trade, and connecting people and business with opportunities. Infrastructure investment should be resilient, sustainable, and inclusive to provide benefits to the greatest number of people.</p>
Social Environment	Significance
<p>Quality of Place. Fresno is a full-service city, e.g., jobs, shopping, entertainment and cultural venues, health care, parks and recreation.</p>	<p>Residents and businesses can access key essential services without long distance travel. Contributes to the city's "sense of place" that is also important for attracting talent.</p>
<p>Community Engagement. Abundant and diverse neighborhood, social justice, and economic development groups and associations.</p>	<p>Business and residents actively engage in discussions about community issues and projects demonstrating their strong interest and commitment to the health and vitality of the city.</p>
<p>Neighborhoods. The city boasts an historic downtown and several unique neighborhoods throughout the city.</p>	<p>Interesting and distinct neighborhoods and commercial centers (downtown, Chinatown, etc.) provide diverse housing and shopping choices, cultural experiences, and visitor destinations.</p>

Population Growth. Fresno County and the city have similar growth trends (historic) and projections to 2040—with slow population growth, consistently rising at an average annual rate of 1%.

Steady population growth suggests a strong consumer demand market and is encouraging to employers considering a future workforce.

Challenges

Challenges are factors that detract from a community’s economic development competitiveness. They constrict or limit a community from reaching its desired goals and economic success. Below is a discussion of the City of Fresno’s challenges and their significance to economic development.

Economic Environment	Significance
<p>Job Growth. Overall, job growth in Fresno is expected to be 5.9% (2022-2030). However, some traded sector industries are likely to see a decline due to increased use of technology (for example, manufacturing, warehouse and distribution).</p>	<p>Higher levels of employment lead to healthy economic growth. Local firms tend to employ more workers and job growth creates earnings which in turn creates demand. The increased use of technology may require new skills and training programs.</p>
<p>Wages. Overall, wages in Fresno have increased from 2019 to 2023 but some occupations are faring better than others. This may be due in part to low unemployment rates, job growth and a slow growing regional labor force.</p> <p>Unfortunately, the cost of living has also increased, and inflation is rising faster than most of the previous 40 years. These two factors equate to a loss of income in terms of purchasing power impacting residents’ quality of life.</p>	<p>Wage increases can have both positive and negative effects on economic growth, depending on the context and factors that cause it. In general wage increases can lead to higher productivity and motivation of workers, which can increase business profits. However, increased wages can also be the result of cost-of-living increases and inflation, that can exert downward pressure on the economy.</p>
<p>Image. Fresno’s internal and external image is maligned. Fresno is the fifth largest city in the state, and yet some residents and stakeholders speak critically of the city and perceive Fresno as a small insular town.</p> <p>Externally, the city is not “top-of-mind” when it comes to business/industry considering a competitive business location.</p>	<p>Whether real or perceived, an unfavorable image or reputation is a challenge to successful economic development and takes a rigorous and collaborative effort to overcome that should address:</p> <ul style="list-style-type: none"> ▪ The messages we tell ourselves about Fresno (internal communications) ▪ The messages we tell others about Fresno (external communications)
<p>Development Process. A reputation for a cumbersome and uncertain planning, permitting and development process.</p>	<p>Whether real or perceived, a slow or unpredictable development process creates a hardship for business development, no matter the reason (e.g. staffing shortages, legal challenges, lack of streamline permitting, etc.).</p>

<p>Development Cost. Equitable assessment and mitigation of business/industrial development impacts in neighborhoods has become contentious in the city, with multiple lawsuits and CEQA appeals.</p> <p>To help assess and eliminate environmental impacts of development, especially in low income and communities of color, the city adopted a Community Benefit Fund (CBF – North Point and South Central). CBF funds can be used to pay for measures such as air filtration systems, dual paned windows, parks, job training programs, and job fairs near the impact area. Businesses locating or expanding in CBF neighborhoods pay into the fund (Amazon paid \$300,000).</p>	<p>Added fees increase business operating costs and add to the city’s risk of losing the business location/expansion to a less costly competitive site. More importantly, the added “uncertainty” that CEQA appeals and lawsuits present increase the likelihood that the business/industry will choose not to participate/contribute or may be unwilling to wait for the challenge/appeal process to play out and seek an alternative location.</p>
<p>Talent Pipeline. The source of future workers (population aged 0 to 19) has been slow. Growth in the population considered Prime Workers (aged 20 to 39) is leveling off. Experienced Workers (aged 40 to 59) and Retiring Soon (aged 60 to 75) are increasing at a faster pace.</p> <p>Many communities in California are facing a forecasted “enrollment cliff” in K-12 education, which has implication for regional labor markets. For Fresno County, the cliff is delayed until the 2025-26 academic year and the population changes to an older population and lower birth rates coincide to drop the K-12 levels toward the 2031-32 academic year. These changes have regional labor-force effects on Fresno as a city economy, as Fresno County (and Madera, Tulare and Kings counties) all provide labor to Fresno’s employers.</p>	<p>Slow population growth and declining school enrollment indicates a limited labor pool and talent pipeline, which is a red flag for new business/industry and expanding businesses.</p>
<p>Educational Attainment. Share of the population with four-year degrees is improving, but still lags behind the state.</p> <p>Enrollment is declining in the State Center District (the community college district that includes Fresno City College). This is occurring throughout the state and nation.</p>	<p>The education level of residents, especially those over 25 years old, helps employers understand the mix of skills in the regional workforce and contributes to decision making regarding a location or expansion decision.</p> <p>Potential new employers will judge the city’s commitment to education by both the physical assets and academic achievement. Employers expect skills training, programs, and pathways to be in place.</p>

Physical Environment	Significance
<p>Sites and Buildings. The city has a very limited inventory of sites for commercial and industrial development to support new business investment or the expansion of existing business/industry. Areas that are desirable or have been identified for job-creating development face long-term obstacles to be market ready, e.g. proper zoning, inadequate infrastructure, absence of and cost to acquire utility services, neighborhood resistance, interested developers, etc.</p>	<p>Lack of available and market-ready land and buildings makes the city less competitive with communities that have ready-for-market properties to support local expansions and new business and industry.</p>
<p>Recreational Facilities. Several existing facilities that attract visitors and serve residents are deteriorating due to a lack of investment and deferred maintenance. For example, the convention center, regional sports park and Woodward Park BMX track have not received significant updates in over ten years.</p>	<p>Old and declining visitor and recreational facilities impacts residents' quality of life, the ability to attract and retain population and workers. The visitor market is also highly impacted especially in a highly competitive state like California where there is an abundance of places to visit.</p>
<p>Broadband. The city has plans to improve access to broadband, but currently there is limited access, especially for residents and businesses in less affluent neighborhoods. Also, many residents lack the digital literacy to access on-line public information and services (i.e. bus schedules, forms, documents, public meetings, etc.).</p>	<p>Broadband is an essential service for accessing information and services for both business and personal use. Digital literacy is increasingly important to access all services (public and private) and employment.</p>
<p>Infrastructure. There has been a lack of public investment (deferred maintenance) to maintain and upgrade essential infrastructure and services.</p>	<p>Residents and businesses are vulnerable to impacts associated with service disruptions and failures, and safety issues (e.g. potholes, Public Safety Radio System).</p>

<p>Public Transportation. The city’s Fresno Area Express (FAX) bus transportation system offers 18 fixed-route bus lines, Handy Ride Paratransit services, the “Q” which is a Rapid Transit line providing express service to specific locations, and the Fresno Hop which is a free trolley service operating Thursday through Saturday to connect CSU Fresno, Campus Pointe, and Fresno City College to several Fresno neighborhoods. Obstacles to ridership include:</p> <ul style="list-style-type: none"> ▪ Frequency and connection: The city is addressing this need by adding more lines and adding/expanding the express service. ▪ Potential riders’ lack of experience: The city started ramping up social media (facebook, instagram, etc.) to help familiarize potential users in how to use the bus system. 	<p>Full-service affordable and convenient public transportation is an essential service to provide workers access to employment, education and essential services (medical, shopping, professional, etc.).</p>
Social Environment	Significance
<p>Housing. The City’s Housing Element (2017-2023 planning horizon) shows that 1) 40% of homeowners are overpaying for housing; 2) 65% of renters overpaying for housing; 3) many residents live in overcrowded housing; 4) over 23,000 additional housing units needed.</p> <p>In response, the city, in partnership with the other cities in Fresno County, is preparing a multi-jurisdictional housing element that will cover a planning period of December 2023 through December 2031. This effort will provide an opportunity for countywide housing issues and needs to be more effectively addressed at the regional level rather than only at the local level.</p>	<p>Lack of affordable housing is a constraint to employment growth and expansion of the labor pool. A tight housing market also leads to higher home and rents and forces workers to commute longer distances or leave the workforce.</p>
<p>Unhoused Population. While the city has invested in creative programs and is making progress, according to the Fresno Madera Continuum of Care (FMCoC) Point in Time (PIT) Count, 4,493 persons were experiencing homelessness at the time of the count, (01-24-2023); a 7% increase from 2022.</p>	<p>A growing population of unhoused residents could lead to job losses and business closures due to safety and security concerns.</p>

<p>Childcare. The local need for childcare is unmet. Only 23% of children (aged 0-12) of working families are provided with child care services, leaving 77% of working families unserved. Only 15% of infants and toddlers of working families have access to care.</p>	<p>Lack of accessible and affordable childcare limits employment and educational opportunities for some residents, further constricting the pool of available labor.</p>
<p>Poverty. The poverty rate in Fresno has hovered around 25% to 30% (2011 to 2021), typically three percentage points above the county rate and 12 to 13 points higher than the state average.</p>	<p>Poverty reduces the level of aggregate demand in the economy, making it poorer and typically requires government to institute enhanced welfare programs, leading to increased government spending.</p>

Threats

Threats are external factors that detract from a community’s economic development competitiveness, or put a community or its economy at risk. While these factors are often beyond the community’s direct control, jurisdictions that want to be competitive put in place programs or have contingency plans to mitigate or respond to threats.

Fortunately, Fresno County and the other participating jurisdictions (including the City of Fresno) developed a multi jurisdictional hazard mitigation plan to make the region less vulnerable to future identified hazards.

External Challenges (Threats)	Significance
<p>State and federal regulatory environment, i.e.</p> <ul style="list-style-type: none">▪ Burden placed on small businesses and fast-food operations by the increased minimum wage.▪ Proposed SB531 will change where sales tax receipts are collected and will impact City’s revenue stream.▪ Potential impact on local jurisdictions’ revenue stream due to the State budget shortfall <p>Utility (gas and electric) disruptions caused by wildfires and other natural disasters</p> <p>Long-term sustainability of water supply</p> <p>Sustained improvement in air quality</p> <p>Natural and weather-related disasters</p> <p>Health-related disasters</p>	<p>Business seeking a location for new or expanding operations strive to eliminate or at least reduce risk—financial, operational, etc.</p> <p>Each of these factors presents a potential risk to a business’ ability to be successful.</p>

Opportunities

Opportunities refer to factors that offer a potential competitive advantage and contribute to goal and objective achievement. Below is a discussion of the City of Fresno’s opportunities and significance to economic development.

Opportunities	Significance
Development of ten Economic Centers that support short- and long-term industrial, commercial, entrepreneurial and small business investment and job creation. Funding and completion of critical infrastructure projects that support economic growth in the Economic Centers.	The identified economic centers offer the most promising short- and long-term opportunity for entrepreneurial, business, and industry growth with land entitlements and infrastructure in place for business development.
A robust organizational ecosystem that can be relied upon to lead, support, and implement priority initiatives.	Numerous government, nonprofit, and community organizations exist in Fresno. Greater coordination and collaboration among these entities could significantly increase their socio-economic impacts.
Fresno’s growing population and strong entrepreneurial spirit could support entrepreneurial and small business growth adding a more diverse mix of businesses, including industry offering higher wages.	Increasing the educational attainment and skill level of the workforce will significantly impact the number and types of businesses attracted to the city.
Leadership and participation in the Central San Joaquin Valley Community Economic Resilience Fund (CERF) to support CEDS goals.	Regional efforts, like the CERF, can significantly leverage the City’s efforts to achieve CEDS goals.

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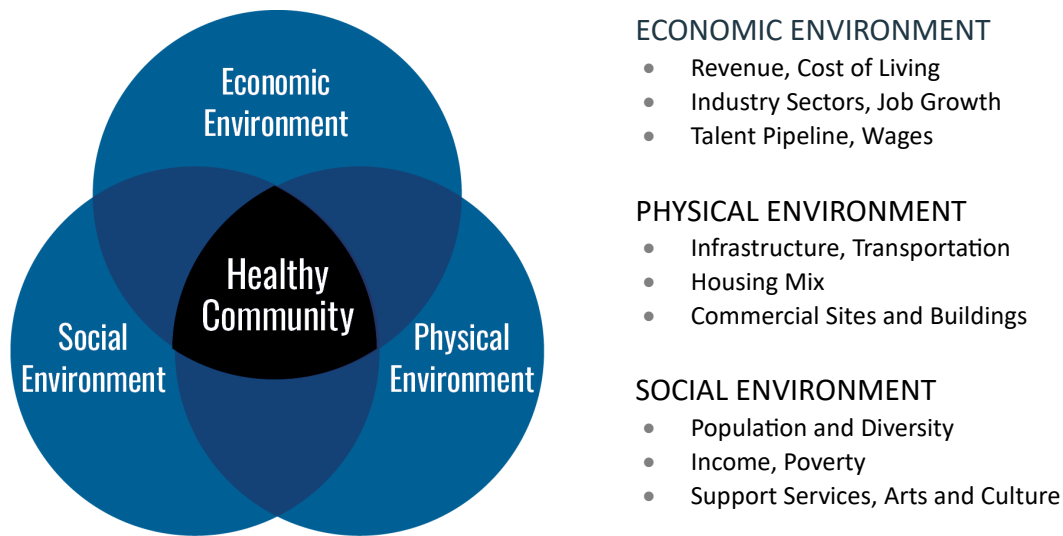
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INTRODUCTION

A community's economic, physical, and social environments are connected and influence each other. For example, (1) infrastructure (streets, utilities, etc.) and housing are reflections of Fresno's "physical" environment; (2) population dynamics are reflections of Fresno's social environment. Both the physical and population characteristics influence and define the city's economic environment, opportunities, and success.

The primary goal of the Fresno CEDS is to achieve a balance among the economic, physical and social environments to create and sustain a socio economically healthy community. The challenges and opportunities to achieving this balance can be seen in the data describing these three environments.



Consider these data with the following concerns or questions:

- Infrastructure and housing: do these assets exist to support economic development?
- Gross regional product (GRP): what industries drive the local economy?
- Workforce and population: what are the demographics and commuting patterns of the local population, what is the job and industry mix to support the local workforce?

Combined, these data describe the region's economic, physical and social environments in terms of how well they support economic development. Providing a brief history, regional comparisons and forecasts when data are available give a contextual and planning viewpoint on the regional economy.

ECONOMIC ENVIRONMENT

This section presents data trends, comparisons and forecasts on the economic elements of Fresno's and the region's environment.

Gross Regional Product (GRP)

Three groups of industries comprise a local economy. First are **goods-producing industries**, or those that generate income from outside the local area as a primary marketplace. Local farms, construction and manufacturing do have local and regional markets, but their primary market is generally outside the area. **Local serving** industries are primarily retail and service jobs, employ all educations and age levels, and pay a wide breadth of wages. **Visitor serving** industries are a mix of local serving (restaurants, hotels, attractions, etc.) employers that also serve markets outside the local area.



Figure 1 provides a history of gross regional product for Fresno as a city economy and Fresno County since 2011.

Fresno was between 52% and 55% of the county economy since 2011. Fresno's economy is dominated by government, agriculture, healthcare, and real-estate related industries. Between 2011 and 2021, Fresno experienced estimated gross regional product growth of approximately 52.4%, where Fresno County grew by 46.6%. In contrast, California's economy grew by 39.2% and the US economy grew by 25.5%.

Figure 2 presents this same data grouped into the three "drivers" as discussed above and provides the jobs associated with the incomes generated by the driver-group industries.

Goods-producing industries grew in terms of the dollar value after inflation and in terms of the contribution to the local economy. The growth of goods-producing industries means that Fresno is shifting to a higher multiplier, broader based economy.

The local serving part of the economy is normally the largest share of a community's economy. As expected, this sector grew in Fresno and remains robust.

The visitor serving portion of the economy declined in terms of GRP and its proportion of the local economy. This can be attributed to the pandemic and the slower re-opening of the tourism industry sector.

Figure 1: Gross Regional Product by Major Industry Group, 2011, 2020 and 2021, Thousands of Current Dollars (Source: Bureau of Economic Analysis, Census Bureau and IMPLAN, 2023 data)

	CITY OF FRESNO			FRESNO COUNTY		
	2011	2020	2021	2011	2020	2021
TOTALS (\$ THOUSANDS)	\$22,306,734	\$30,879,187	\$32,129,933	\$34,096,276	\$46,980,383	\$51,719,476
Agriculture, forestry, fishing and hunting	\$1,134,334	\$1,010,136	\$1,114,402	\$4,197,362	\$4,209,235	\$4,829,904
Mining, quarrying, and oil and gas extraction	\$57,397	\$25,105	\$48,579	\$486,869	\$191,138	\$295,767
Utilities	\$1,025,694	\$833,160	\$663,385	\$1,083,189	\$1,137,624	\$1,143,767
Construction	\$686,244	\$1,554,028	\$1,783,746	\$993,458	\$2,526,281	\$2,786,706
Manufacturing	\$1,413,778	\$1,964,602	\$2,233,561	\$2,232,253	\$3,064,132	\$3,234,526
Wholesale trade	\$1,721,370	\$2,372,577	\$2,852,085	\$1,995,182	\$2,934,031	\$3,161,833
Retail trade	\$1,187,247	\$1,702,940	\$1,853,417	\$2,272,182	\$3,519,820	\$4,053,896
Transportation & warehousing	\$730,657	\$1,208,921	\$1,431,425	\$979,761	\$1,954,380	\$2,406,472
Information	\$509,421	\$636,053	\$717,437	\$874,855	\$1,185,565	\$1,298,408
Finance and insurance	\$1,165,025	\$1,572,490	\$1,505,418	\$1,315,201	\$1,623,458	\$1,758,154
Real estate & rental and leasing	\$3,297,235	\$4,409,129	\$3,859,578	\$4,514,028	\$5,541,032	\$6,027,727
Professional, scientific, and technical services	\$1,282,862	\$1,623,834	\$961,941	\$1,137,693	\$1,549,104	\$1,658,519
Management of companies	\$132,094	\$218,880	\$215,788	\$259,755	\$273,490	\$334,223
Admin. support; waste mgmt. and remediation	\$731,008	\$1,121,965	\$1,228,003	\$856,696	\$1,286,641	\$1,417,428
Educational services	\$158,561	\$148,419	\$157,376	\$232,631	\$207,197	\$227,845
Health care & social assistance	\$2,279,666	\$3,778,389	\$4,258,821	\$2,985,753	\$5,191,073	\$5,661,671
Arts, entertainment, and recreation	\$54,541	\$97,439	\$82,763	\$110,839	\$109,664	\$156,055
Accommodation and food services	\$618,858	\$1,093,912	\$1,224,186	\$760,488	\$1,164,318	\$1,494,799
Other services (except government)	\$822,877	\$1,076,533	\$1,189,024	\$819,120	\$1,123,667	\$1,213,436
Government & gov. enterprises	\$3,297,865	\$4,430,675	\$4,748,998	\$5,988,961	\$8,188,533	\$8,558,340

Figure 2: GRP Drivers, City of Fresno, 2011, 2020 and 2021, Number of Workers and Current Dollars (Source: Bureau of Economic Analysis, Census Bureau and IMPLAN)

GRP DRIVERS	2011	2019	2021	AVERAGE ANNUAL CHANGE (2011-21)
Goods-Producing	\$4,317,447,440	\$5,387,031,543	\$6,771,036,900	5.2%
Local Serving	\$17,012,788,755	\$24,634,905,457	\$24,447,646,100	4.0%
Visitor-Serving	\$976,500,000	\$857,250,000	\$911,250,000	-0.6%
Total	\$22,306,736,195	\$30,879,187,000	\$32,129,933,000	4.0%
JOBS				
Goods-Producing	23,305	28,944	30,063	2.9%
Local Serving	165,158	195,827	204,611	2.4%
Visitor-Serving	8,925	11,430	10,193	1.4%
Total	197,388	236,201	244,867	2.4%

Taxable Sales

Figure 3 shows the estimated levels of taxable sales as reported by the California Department of Tax and Fee Administration. The City of Fresno has been consistently more than 50% (closer to 55 since 2020 on average) of Fresno County's total, with the annual changes growing a bit faster than the county levels. One caveat is that these are not "real" taxable sales, as they are current dollars and thus may be rising not because of more productivity by business that are selling taxable items but due to price increases.

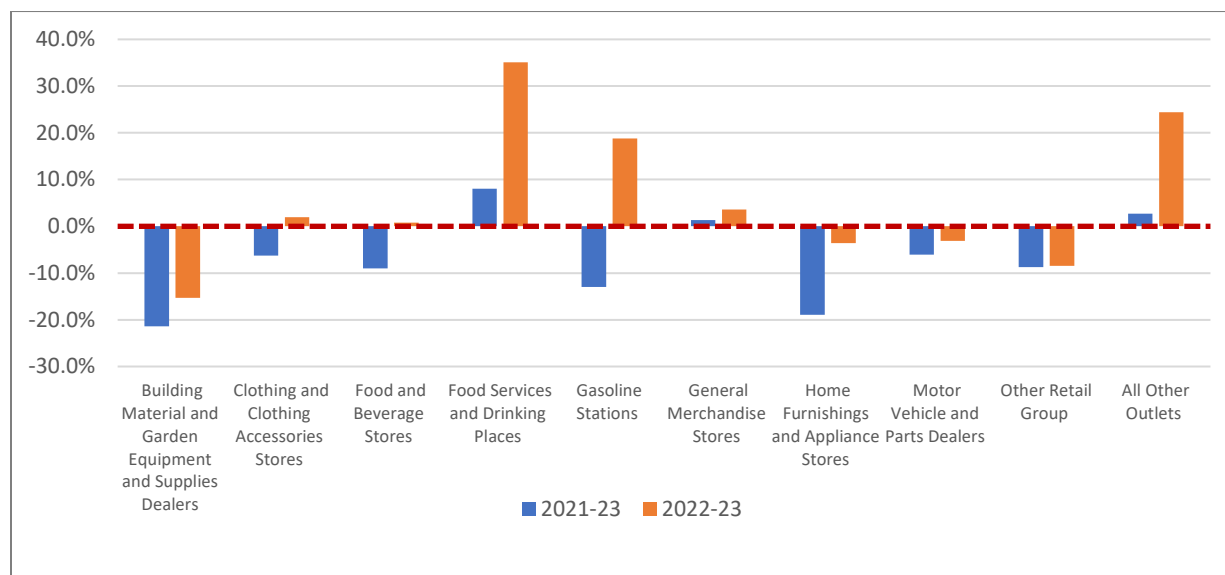
Figure 3: Taxable Sales, 2015-2022, Annual Totals, Fresno City and Fresno County, Fresno as % of County Total, Current Dollars (Source: California Department of Tax and Fee Administration, CDTFA)

YEAR	FRESNO CITY	FRESNO COUNTY	% OF COUNTY	% CHANGE FRESNO	% CHANGE COUNTY
2015	\$7,499,066,083	\$14,189,429,105	52.8%		
2016	\$7,699,944,229	\$14,184,096,842	54.3%	2.7%	0.0%
2017	\$7,934,752,502	\$14,755,750,695	53.8%	3.0%	4.0%
2018	\$8,270,218,828	\$15,386,255,626	53.8%	4.2%	4.3%
2019	\$8,702,723,377	\$16,218,883,236	53.7%	5.2%	5.4%
2020	\$8,389,187,913	\$17,078,806,001	49.1%	-3.6%	5.3%
2021	\$12,810,755,342	\$22,960,963,038	55.8%	52.7%	34.4%
2022	\$13,318,421,534	\$24,228,245,429	55.0%	4.0%	5.5%

Figure 4 provides the changes by major vendor categories. Across the board there has been some decline after a robust 2021 for many retailers. Food services and drinking places (bars and restaurants) picked up because the economy re-opened in full. The comeback in bars and restaurants, and gas stations is driven by 1) people driving more, there is a return to meeting in person, visitor travel is returning; and 2) increase in gas prices.

The “all other” category includes the other places where retail happens (e.g., convenience stores and fitness centers that have a retail point of sale). This category experienced a nice comeback because many of those final re-openings happened over the last 12 to 18 months and retail picked up in those outlets.

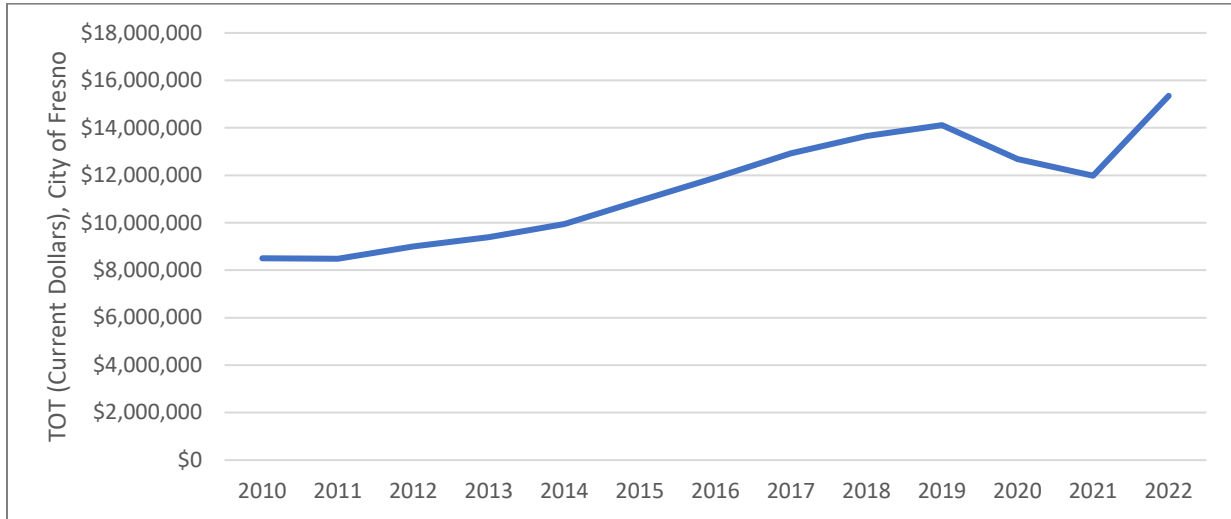
Figure 4: Percentage (%) Change in Taxable Sales by Category, City of Fresno, 2021 Q1 and 2022 Q1 to 2023 Q1, Current Dollars (Source: CDTFA)



Transient Occupancy Tax (TOT) and Travel Data

A broader link to taxable sales is the flow of visitors to Fresno. Figure 5 provides a look at transient occupancy tax (TOT) revenue for the City of Fresno based on overnight stays in the city. The 2010 to 2019 period was a long growth phase in which the region and the state experienced more people visiting. With the onset of COVID, the next two years took a sharp decline and lingered for about another 12 months and then started to pick up. This is an indication of how resilient Fresno has been in terms of its ability to bring people back to Fresno and back to staying overnight. Overnight stays are a critical factor for local hoteliers and the concentric circles of smaller businesses that serve visitors. Putting people in hotel rooms greatly accelerates their spending.

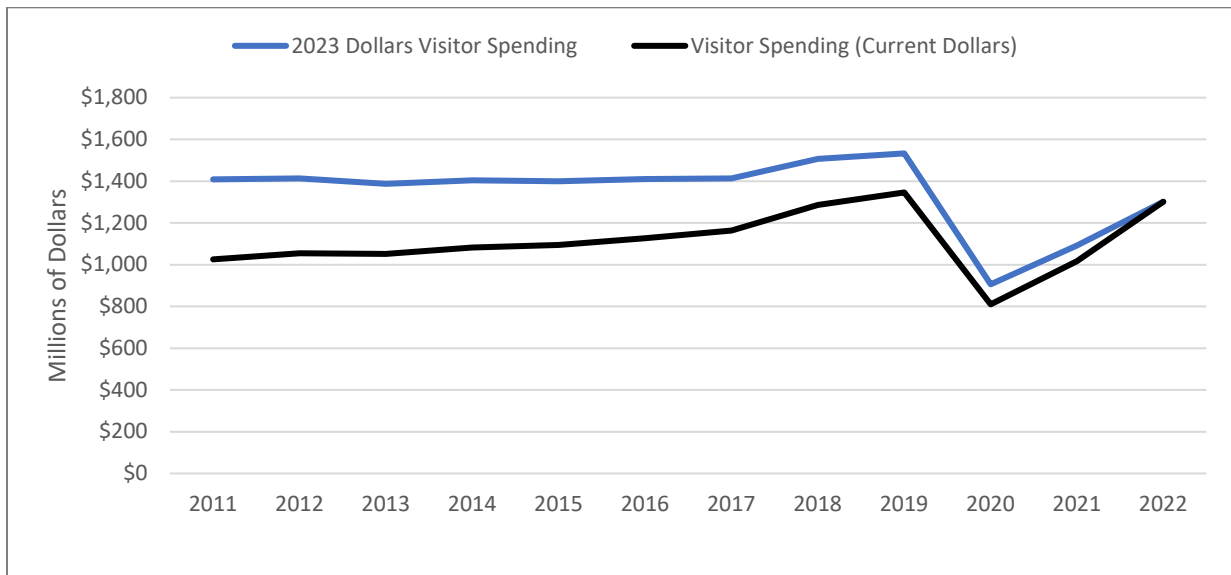
Figure 5: Transient Occupancy Tax (TOT) Data and TOT Per Resident, 2010-2022, City of Fresno (Sources: City of Fresno and California Department of Finance)



Visitor Spending

Figure 6 is a recent estimate at the county level of visitor spending since 2011 and adjusted for inflation. Similar to other taxable sales, hotel stays and other taxable sales from tourism are affected not just by more visitors but by higher prices. Notice the spending and TOT have similar trends since 2011.

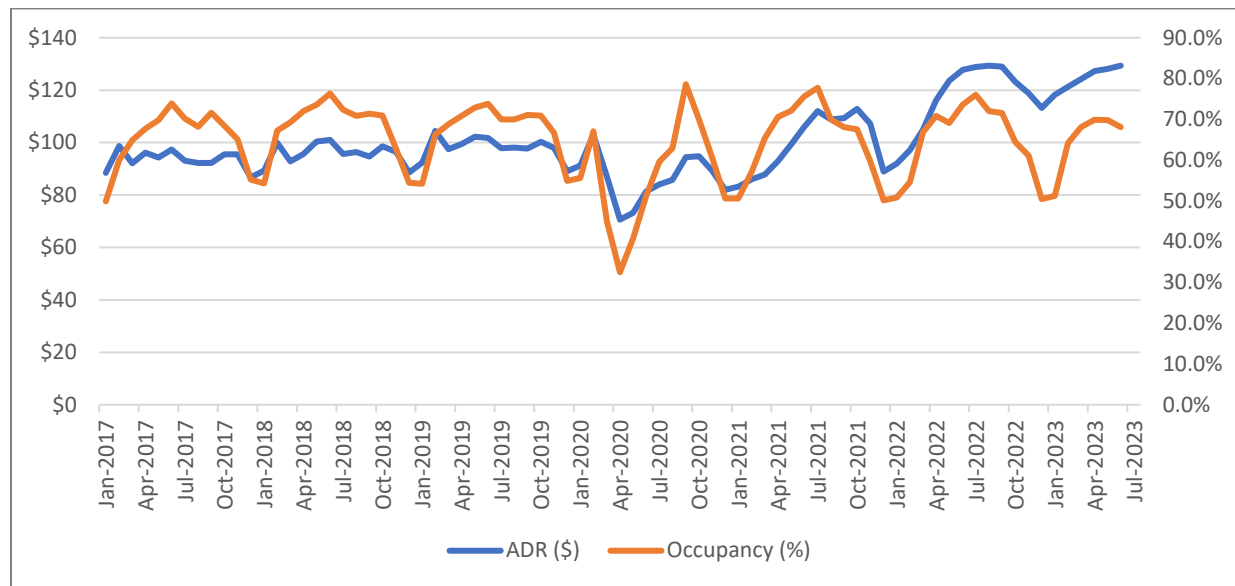
Figure 6: Tourism Spending, Fresno County, 2011 to 2022, Total Spending and Major Categories, Millions of Dollars (Sources: Dean Runyan Associates and CalTrans)



A statistic related to TOT is the average daily rate (ADR) charged by hoteliers and the occupancy rate (what percentage of offered rooms were occupied that month). The product of these two numbers is what is known as RevPAR, or revenue per available room, the taxable sale on which TOT is based.

As shown in Figure 7, the ADR increased in 2022 and 2023 from the previous trend, which revolved around \$100 per night from January 2017 to the end of 2021. Inflation is evident again. With little change in occupancy, the price change suggests a combination of more visitors to Fresno and higher costs passed on to overnight visitors.

Figure 7: Average Daily Rate (ADR) and Occupancy Rate, City of Fresno, 2017 – 2023 (Sources: Smith Travel Research and City of Fresno)



Labor Force and Employment

Changes in the labor force reflect population changes and housing occupancy characteristics (number and type of housing units occupied by families that provide workers to the local economy and students to schools). To sustain a workforce that meets the demands of a growing economy, new workforce entrants are needed (talent pipeline). Without new entrants into the workforce (youth and young adults), hiring becomes more difficult in personal services industries, construction, agriculture, retail, and restaurants.

Nationally, labor force levels were affected by the pandemic in terms of both changes in the want-to-work, the incentives to work, and population shifts. The volatility of Fresno as a city exceeded that of Fresno County overall.

Fresno County was among the fastest growth labor markets in California as the economy re-opened after the pandemic shutdown and was one of the earliest counties to emerge from the pandemic and see jobs growth versus pre-pandemic levels. Fresno recovered very well and the number of people who are available for work has grown above pre-pandemic levels, in contrast to the state of California. This suggests that working people have moved to Fresno and are looking for work or have re-joined the labor force.

At the same time the labor force (Figure 8) was slowly evolving to return the number of available workers to pre-pandemic levels. Figure 10 shows that Fresno as a city economy and Fresno County have closed the unemployment gap with the state average, but both remain above the state average to June 2023 from January 2010 on a monthly, seasonally adjusted basis.

Figure 9 shows the evolution of jobs in Fresno (city and county). Smooth growth, sharp cut, then recovery and expansion. The slight downturn (June 2023) is an indication of the national economy context and trying to slow the economy down.

Figure 8: Labor Force Comparisons, Fresno City to Fresno County, 2010 to 2023, Monthly, Number of Workers that are Residents of Fresno and Fresno County (Source: California EDD)

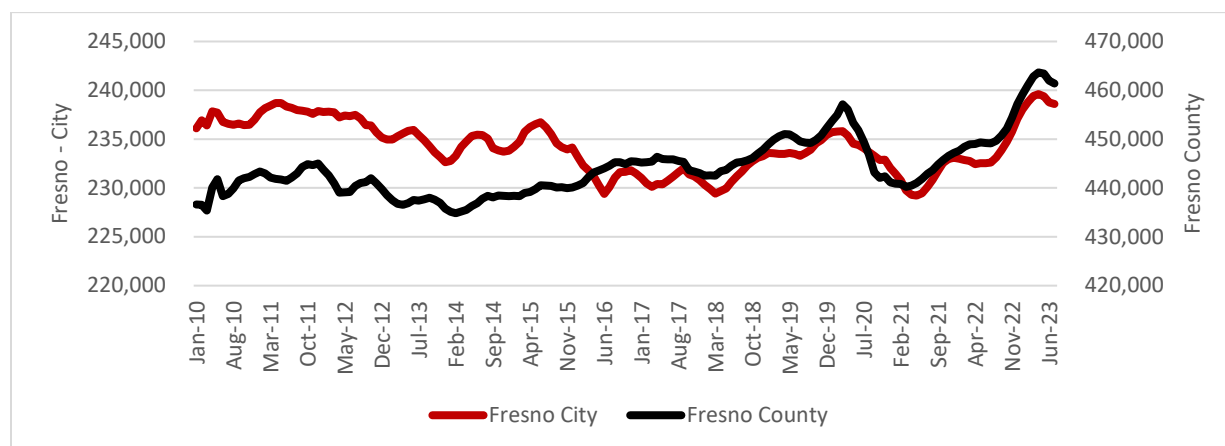


Figure 9: Employment Comparisons, Fresno City to Fresno County, 2010 to 2023, Monthly, Number of Workers who are Residents of Fresno and Fresno County (Source: California EDD)

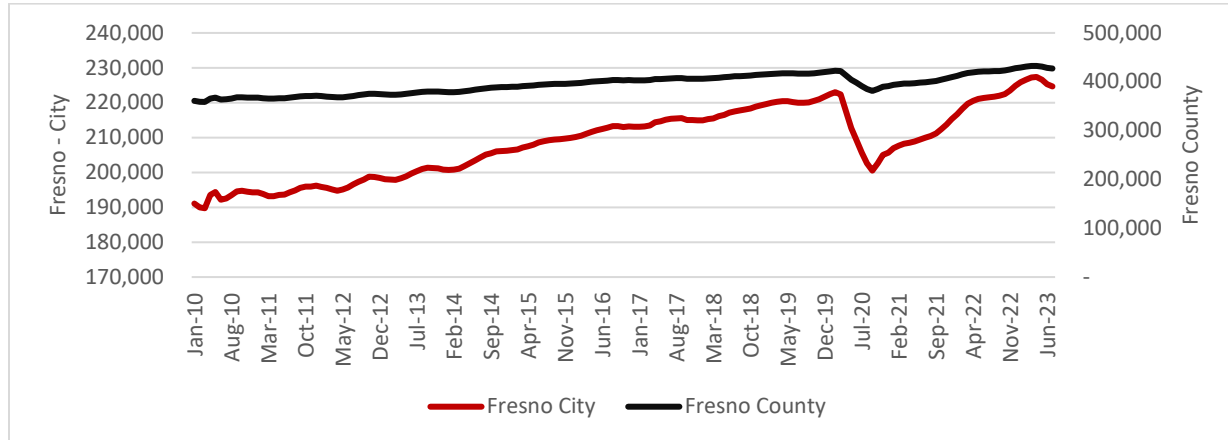
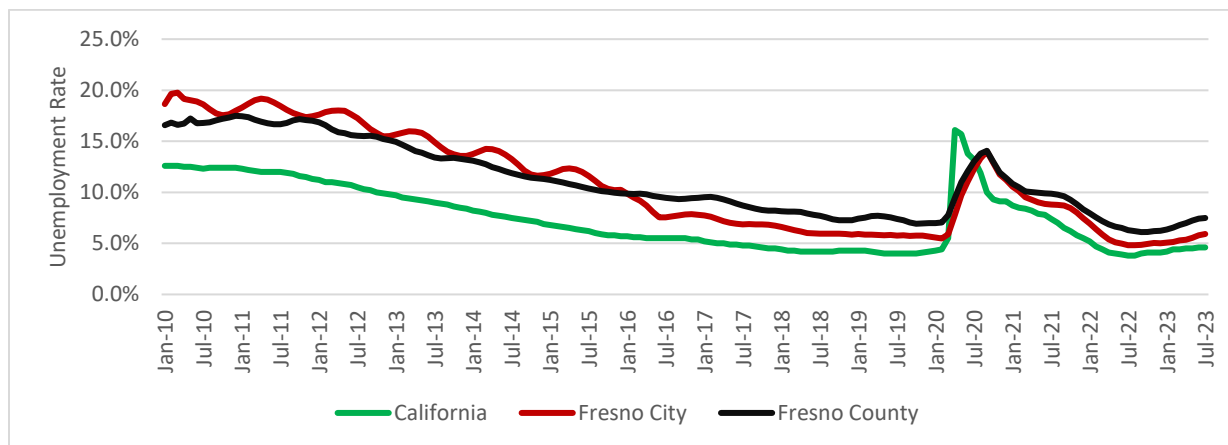


Figure 10: Unemployment Rate Comparisons, Fresno, Fresno County and California, 2010 to 2023, Percent (%) of Labor Force, Seasonally Adjusted (Source: California EDD)



Commute Pattern

According to the U.S. Census Bureau, a good majority (73.9%) of City of Fresno employed residents aged 16+ work in the city. Most of the remaining workers are employed within the county or nearby cities of Clovis, Madera, or Sanger. The mean travel time is just 22 minutes.

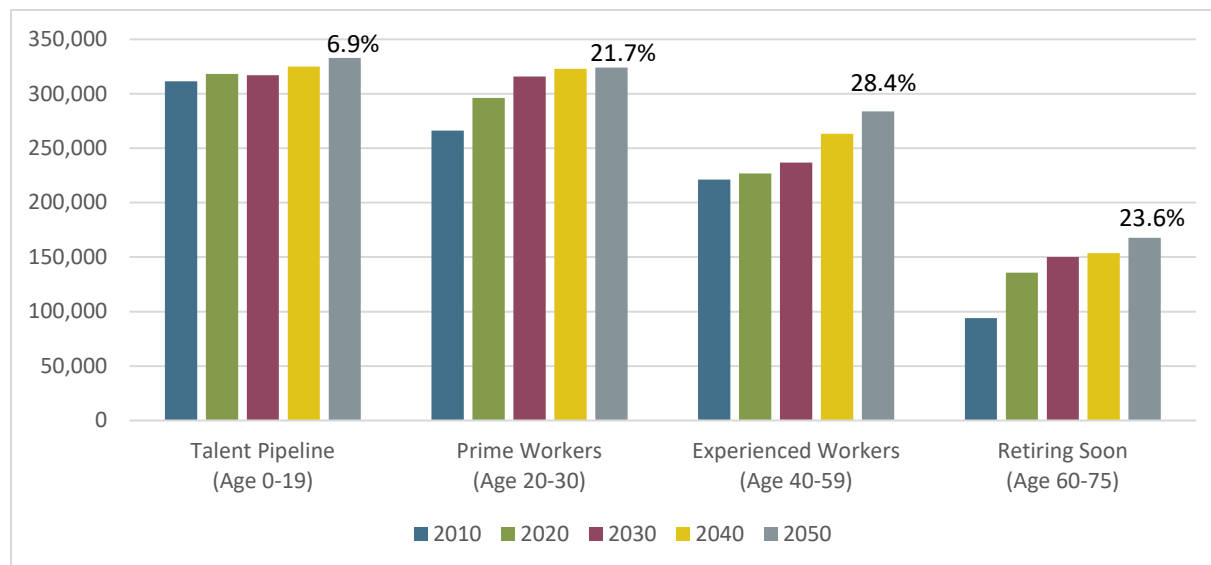
Talent Pipeline

The source of the future workforce (Talent Pipeline, population age zero to 19) has seen small, slow growth. This is a situation seen in many communities around the nation. In fact, it is not uncommon to see actual and projected declines in this age group. Fortunately for Fresno employers this category shows some growth and there is a substantial college student population in the region that can and should be attracted to employment in Fresno.

Prime Workers (age 20 to 39) are those who recently entered the labor force (some may be college and university graduates. In Fresno the percentage of Prime Workers has grown over the last few years and is predicted to continue to grow through 2050.

The two older population categories (ages 40 to 59 and 60 to 75) are growing at a faster rate than the incoming workers. This can put pressure on employers' ability to replace retiring workers and on a community's ability to support an older, retired population.

Figure 11: Talent Pipeline Trend in Fresno County. California Department of Finance, Report P-2B: Population Projections by Individual Year of Age, 2010-2060



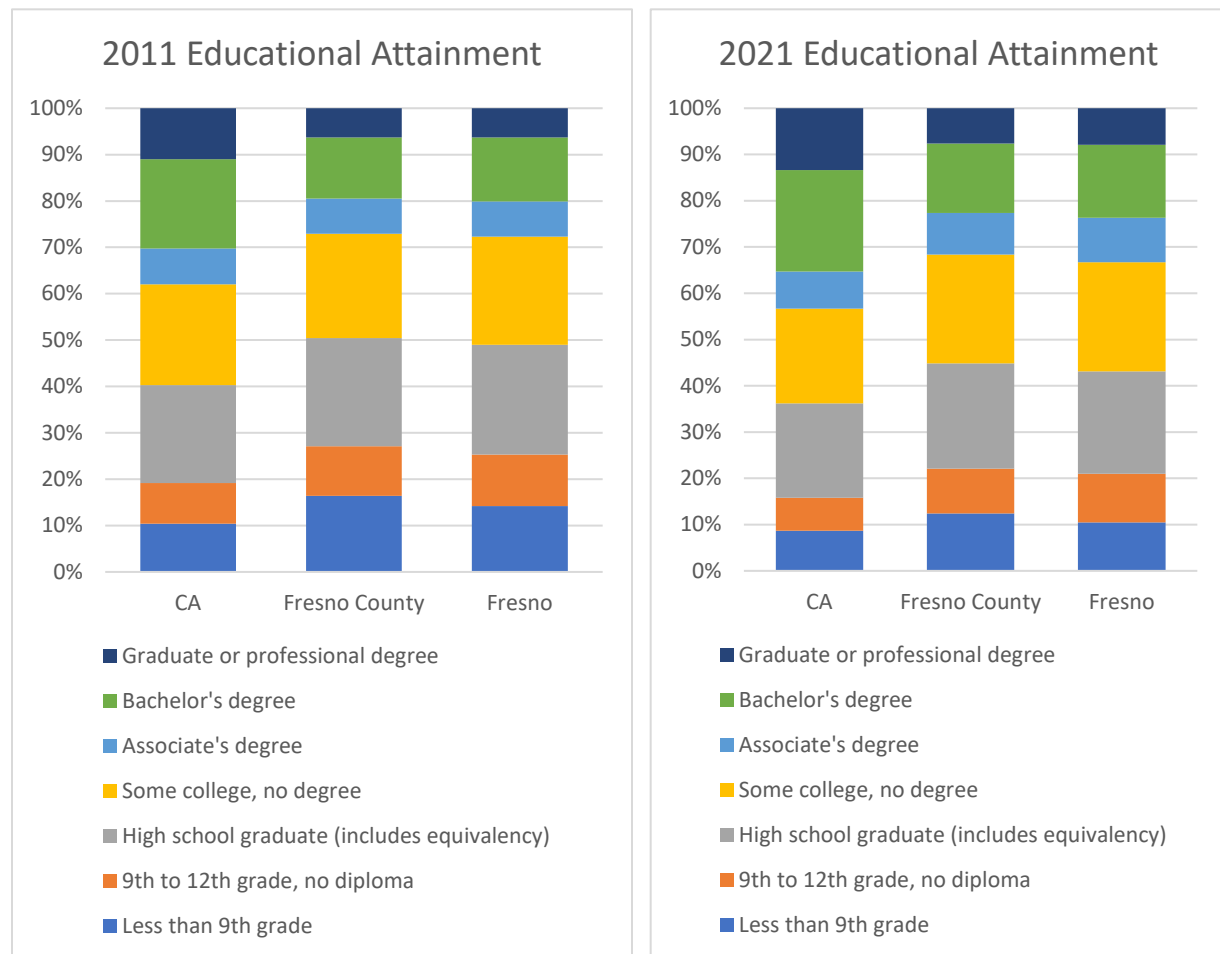
Educational Attainment

Overall, the educational attainment of the Fresno's population aged 25+ is improving. From 2011 to 2021 the share of population with a Bachelor or Graduate degree went from 20% to nearly 34%.

On the other end of the attainment scale, those with a high school or less educational level are also improving. In 2011, these groups accounted for 49% of the population. In 2021 this improved to just 43% of the population.

There was a slight increase, about two percentage points, in those with less than a four-year degree (e.g., associate degree and some college). Unfortunately, training programs that are certificate-based or some other form of validating completion are not reflected in this data on degree attainment and, therefore, the skills sets may be under-represented. Data on Career Technical Education (CTE) completers is presented in the following section.

Figure 12: Educational Attainment for Residents, % of Total Population over 25 Years of Age, 2011 and 2021, City of Fresno, Fresno County and California Statewide (Source: Census Bureau, American Community Survey)



Career Technical Education

Declining enrollment in higher education has been experienced throughout the state and is occurring in the State Center District which includes Fresno City College, Clovis Community College, Madera Community College, and Reedley College. Fortunately, the District has fared a little better on enrollments than the state overall. While there are fewer students enrolling, the number of earned certifications is positive.

Figure 13: Career and Technical Education performance. (Source: LaunchBoard, statewide data system supported by the California Community Colleges Chancellor's Office and hosted by Cal-PASS Plus)

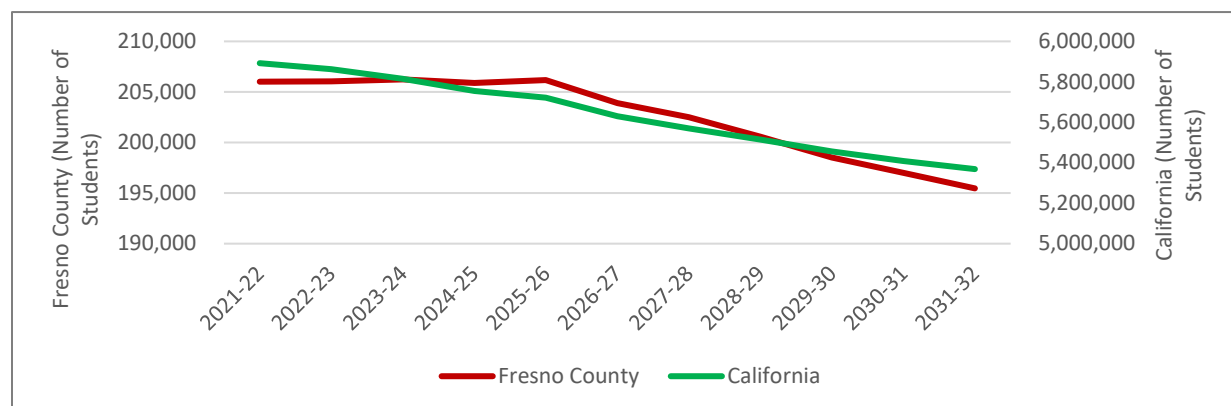
STRONG WORKFORCE PROGRAM ENROLLMENTS	2017-18	2018-19	2019-20	2020-21	2021-22	PERCENT CHANGE 2017-18 TO 2020-21
Statewide	1,015,923	1,014,576	1,008,154	901,435	838,713	-17.4%
State Center District	28,730	29,175	29,581	27,125	25,348	-11.7%
EARNED DEGREE OR CERTIFICATE						
Statewide	69,397	75,382	77,754	79,883	80,082	15.4%
State Center District	2,455	2,600	2,534	2,643	2,693	9.7%

K-12 Attendance

Many communities in California are facing a forecasted “enrollment cliff” in K-12 education which has implications for regional labor markets. The current population forecast for California is an aging population and a lower birth rate. The migration of people that come to Fresno is predicted to slow, those people are predicted to be older, and therefore, will have fewer children in school. The enrollment decline in Fresno is delayed until the 2025-26 academic year when the aging population and lower birth rates coincide to drop the K-12 levels toward the 2031-32 academic year.

These changes will impact the regional labor force and Fresno as a city economy, as Fresno County (and Madera, Tulare and Kings counties) all provide labor to Fresno employers. These changes will also put more financial pressure on school districts due to reduced funding.

Figure 14: K-12 Attendance Levels, Number of Students in Public Education, Fresno County and California, 2021-22 (Actual) to 2031-32 (Forecasted from 2022-23 forward) Academic Years (Source: California Department of Finance)

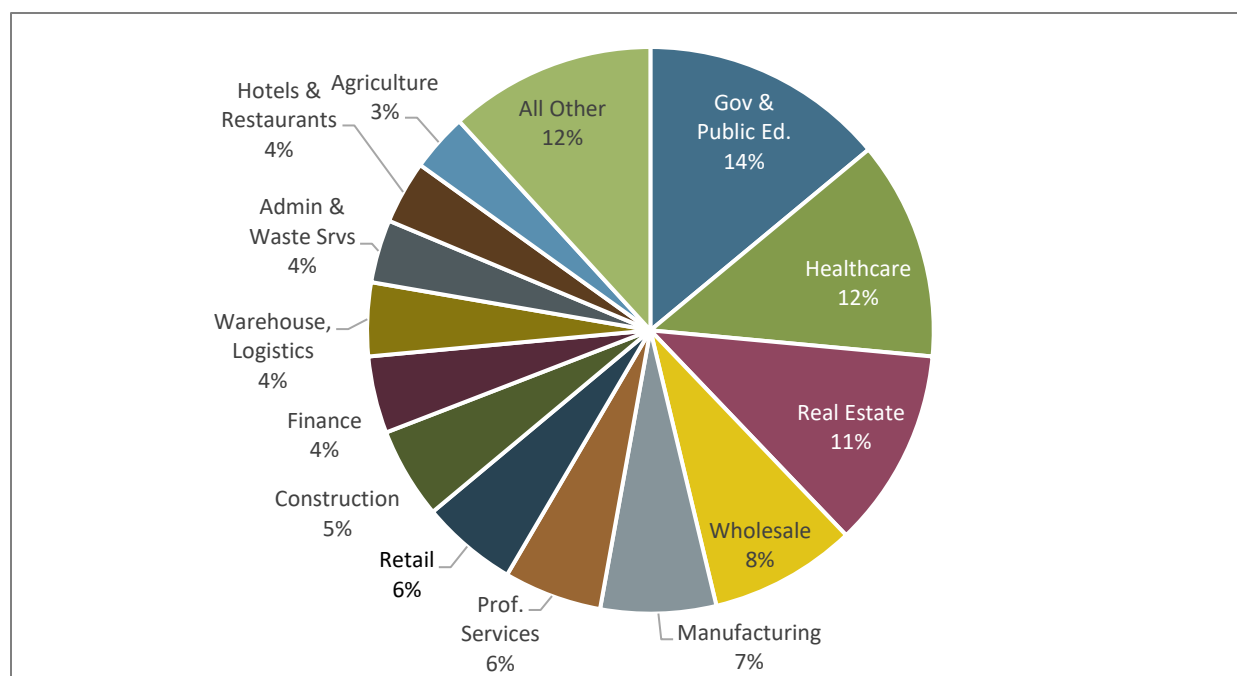


Industry Mix

The City of Fresno economy is dominated by six industries, Government and public education (Fresno State, Fresno City College, the K-12 education system, all the state, federal, county, and city employees), Healthcare, Real Estate and Commercial Rentals, Wholesale, Manufacturing, and Professional Services (the more scientific and technical jobs).

This is a nicely balanced economy. Construction and Manufacturing are relatively large. The city's portion of the manufacturing sector is on balance with the state's which is about 11 to 12%). One might expect to see Agriculture be a larger part of the employment mix, but this is showing city employment. As you progress out in concentric circles and include the county, about 11% of jobs are in agriculture.

Figure 15: City of Fresno industry mix, 2021 employment. (Source: Census Bureau and IMPLAN®)



Wages

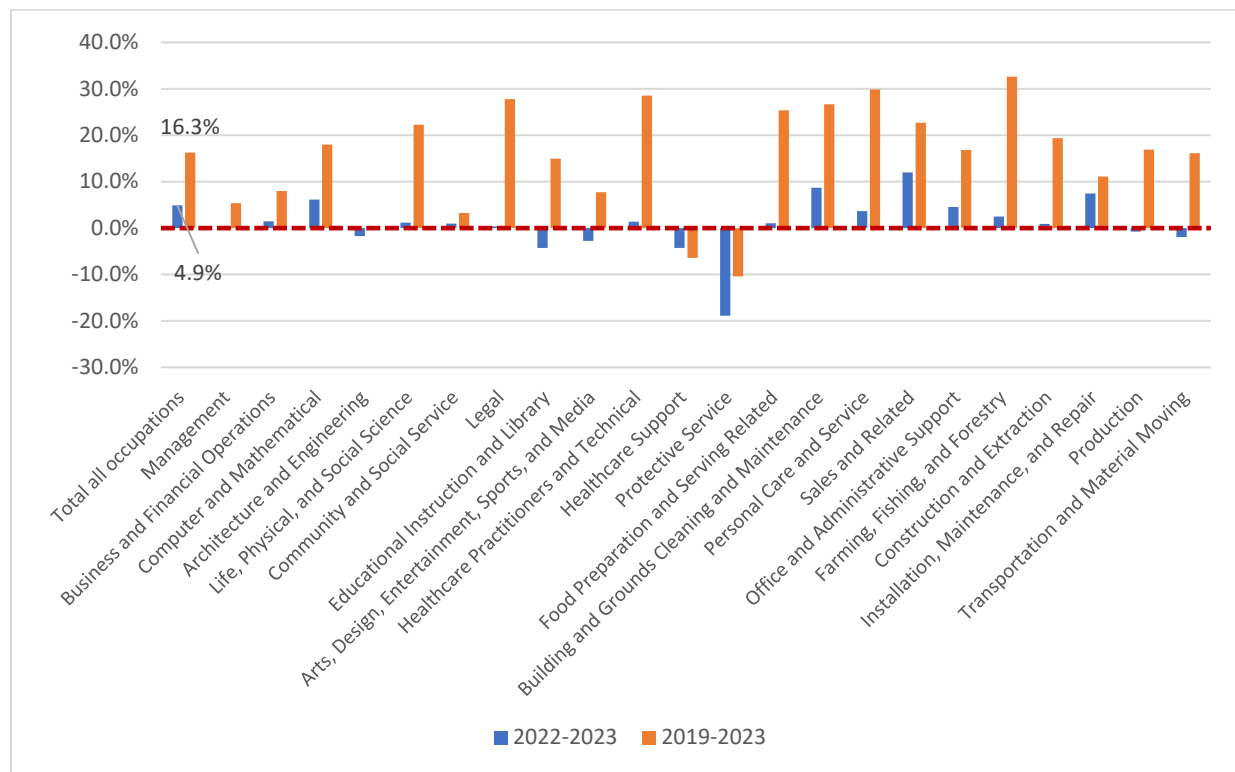
Due to low unemployment rates, jobs growth and a slowly growing regional labor force, wages in Fresno have increased. Unfortunately, so has the cost of living as measured by the state-level consumer price index (CPI) and array of national price indices (including a national version of the CPI). It is important to track not what the current wage workers are paid but the real or inflation-adjusted wage. This wage takes into consideration the change in what employers offer to pay workers and the change in inflation; when real wages rise, workers gain purchasing power or real growth to their income.

As Figure 16 shows, there was wage growth in inflation-adjusted terms since 2019, but not all occupations in Fresno County experienced wage growth after inflation over that four-year stretch. Since 2022 (one-year change), healthcare and protective services have seen more downward pressure than

other occupations. These range from registered nurses to medical assistants and police officers and fire professionals to security guards for shopping malls. In a time where we have seen inflation rise faster than most of the previous 40 years, a loss of income in terms of purchasing power can reduce incentives to take offered work and increase search time for those that employ such occupations.

Wages provide income for regional households and that becomes the basis of how broader economic impacts, like taxable sales, take place. Wage growth should lead to a larger spending capacity in the local economy and perhaps less retail leakage if new retailers come to Fresno seeking to take advantage of rising wages and thus rising spending levels. Rising taxable sales can also reflect how much tourism is changing for the local economy.

Figure 16: Wage Growth, Fresno County, 2019 and 2022 Compared to 2023 Wages, 2023 Dollars, By Occupational Sector (Source: California EDD and Bureau of Labor Statistics)



Jobs Forecast

The forecast below is a status quo forecast as of 2022 for Fresno to 2030 for jobs growth in major industries. Some of the transportation and warehousing industry's expected job loss from 2022 to 2030 can be attributed to an increased use of technology and normalization after the pandemic employment increase (notice the change from 2016 to 2022).

Figure 17: Jobs Forecast by Industry, Fresno, 2011–2022 (Actual) and 2030 Forecasted (Sources: Census Bureau, IMPLAN®, California EDD)

INDUSTRY	2011	2016	2019	2022	2030	% CHANGE 2022-30
Agriculture, Forestry, Fishing and Hunting	1,793	2,594	2,189	2,269	2,245	-1.1%
Mining, Quarrying, and Oil and Gas Extraction	23	7	3	2	2	0.0%
Utilities	1,333	1,278	1,410	1,917	2,200	14.8%
Construction	6,971	10,105	12,176	13,572	14,200	4.6%
Manufacturing	13,185	13,604	13,166	13,600	13,572	-0.2%
Wholesale Trade	8,466	8,650	8,661	9,557	10,000	4.6%
Retail Trade	20,240	23,157	23,267	24,355	25,000	2.6%
Transportation and Warehousing	5,882	6,368	9,187	10,654	10,465	-1.8%
Information	3,063	3,389	2,940	3,143	3,026	-3.7%
Finance and Insurance	6,938	7,428	7,942	8,304	7,829	-5.7%
Real Estate and Rental and Leasing	3,347	3,638	3,757	4,067	3,822	-6.0%
Professional, Scientific, and Technical Services	8,285	8,910	9,112	10,129	10,684	5.5%
Management of Companies and Enterprises	1,907	2,085	2,413	2,893	3,169	9.5%
Administration & Support, Waste Management and Remediation	11,266	16,440	14,458	16,651	15,177	-8.9%
Educational Services	18,839	22,289	22,826	25,379	29,670	16.9%
Health Care and Social Assistance	30,578	46,657	51,049	56,558	62,089	9.8%
Arts, Entertainment, and Recreation	2,268	2,678	2,602	2,517	2,983	18.5%
Accommodation and Food Services	17,102	20,286	21,730	22,191	27,226	22.7%
Other Services (ex. Public Administration)	14,485	8,360	8,476	9,207	9,547	3.7%
Public Administration	21,417	17,900	18,837	20,413	19,763	-3.2%
Totals	197,388	225,823	236,201	257,378	272,669	5.9%

Figure 18. Historic Job Growth by Industry Sector

INDUSTRY SECTOR	2011	2016	2019	2022	% CHANGE 2011-2022	EMPLOYMENT SHARE 2022
Goods producing	141,698	161,531	166,487	183,016	3.22%	71%
Local serving	36,320	41,328	45,382	49,654	3.54%	19%
Visitor serving	19,370	22,964	24,332	24,708	2.02%	10%

Economic Impact of Jobs in Retail vs. Manufacturing

Jobs growth in specific industries has differing impacts on an economy. Goods producing industries tend to be stronger economic growth engines given that the conditions and infrastructure are in place to allow those businesses to grow and thrive. Growth in goods producing industries is a key aspect of economic development because these industries support other jobs locally, provide better jobs, higher wages, an improved quality of life—all things that support housing markets, schools, local community organizations and entrepreneurs.

The following data compare the effects of 100 new jobs in two industries—manufacturing and retail—and the estimated effects on Fresno’s economy, business revenues, jobs supported, wages paid, and state and local tax receipts associated with the growth of incomes from those new jobs. Figure 19 presents a summary of the difference 100 manufacturing jobs make versus 100 retail jobs. Data for this comparative analysis is from the Bureau of Economic Analysis and IMPLAN® which provides the model for economic impacts from industry growth.

Figure 19. Summary Economic Impacts of Retail vs. Manufacturing Jobs

	100 RETAIL JOBS	100 MFG JOBS	DIFFERENCE
Additional jobs supported	40	123	207.5%
Direct wages paid	\$3,891,300	\$7,577,300	94.7%
Additional wages supported	\$1,828,400	\$6,630,800	262.7%
Annual tax receipts generated	\$2,010,200	\$4,036,800	100.8%

Impact of new Retail: When a new retailer comes to Fresno or expands to a new location, there is a positive impact on the local economy. Retail provides more consumer breadth and depth for local businesses and residents. But, because average wages are lower in retail than in manufacturing, the additional jobs supported, overall business revenues and taxes are fewer than in manufacturing.

Impact of new Manufacturing: In most cases, the manufacturing sector creates larger multiplier effects than retail. In Fresno, this is true for all manufacturing, according to data from the Bureau of Economic Analysis and IMPLAN®, which provides the model for economic impacts from industry growth. Further, while manufacturing can support and spur more retail employment and businesses, it is less likely that new retail would lead to more manufacturing employment in Fresno.

PHYSICAL ENVIRONMENT

This section presents data and information on the physical environment of the city, county, and region. The physical environment includes infrastructure, housing, sites and buildings for job-creating industry, and the region's susceptibility to natural disasters.

Infrastructure

Downtown Redevelopment. Recently, the city acquired \$342 million for infrastructure improvements that are expected to catalyze and accelerate new investment in residential and mixed use developments. Funding is slated for two additional parking structures, new intermodal transit center, sidewalks, streets lighting, landscaping, stormwater facilities, water distribution, wastewater improvements, and new public parks and green spaces.

Municipal Services. Even with this unprecedented public infrastructure investment, there remains a substantial need for additional public investment throughout the city to accommodate years of deferred maintenance, equipment purchases and needed upgrades to essential infrastructure and services. Among the significant capital improvements needed are:

- Water—water main replacements, increased groundwater storage capacity and improvements, well rehabilitation, filter gates and ladders, irrigation infrastructure
- Waste—landfill regrading, sewer mains, pump improvements, pipeline covers, sewer rehab projects, odor control systems
- Transportation—street paving and improvements, roundabouts, intersection upgrades, lighting, traffic signals and other traffic calming measures, pedestrian and bicycle safety and amenities, public transit improvements and amenities
- Other—sustainability, energy management, ADA compliance projects, neighborhood parks and recreation facility improvements

Broadband. About 84% of Fresno County households have access to broadband.¹ This is inline with the state (90%) and the nation (87%). The city's IT Master Plan details continued improvements to broadband especially for residents and businesses in less affluent neighborhoods. The city is also pursuing the expansion of small cell 5G sites to include disadvantaged communities, funding for last mile improvements, and ongoing upgrades and expansions including for citywide fiber.

Public Transportation. The city offers 18 fixed-route bus lines and Handy Ride Paratransit services with a modern clean and green fleet of over 100 buses, with connections to regional providers. The city also operates Fresno Area Express (FAX), an express bus service. More lines are needed to meet demand (frequency, connections).

Parks. The city of Fresno adopted the Fresno Parks Master Plan after extensive community input. It shows that 80% of Fresno's parks are in fair or poor condition and presented a plan for improvements. A

¹ U.S. Census Bureau's Community Resilience Estimates as of 7/2023

sales tax initiative, Measure P, was approved by Fresno voters to help fund new, maintain, and improve existing neighborhood parks, facilities, and trails.

Sites and Building

The city has a very limited inventory of sites for commercial and industrial development to support new business investment or the expansion of existing business and industry. Areas that are desirable or have been identified for job-creating development face long-term obstacles to be market ready, e.g. proper zoning, inadequate infrastructure, absence of and cost to acquire utility services, and neighborhood resistance to development. Opportunities are further discussed in Appendix D, Economic Centers.

Natural Disasters

Floods, wildfires, drought, earthquakes are a few of the natural hazards that may occur in the Fresno area. The city of Fresno along with other local, regional and state agencies partnered to create a hazard mitigation plan to prepare for and respond to natural disasters and emergencies.

The city of Fresno offers a Community Emergency Response Team (CERT) program to train citizens to be better prepared to respond to emergency situations in their home, workplace and community. CERT training is a 20-hour curriculum developed by the Los Angeles Fire Department, FEMA, and the Department of Homeland Security (DHS). It is designed to provide individuals with basic emergency response skills valuable in the initial hours or days after a disaster. Courses include disaster preparedness, fire safety and suppression, medical triage and treatment, urban search and rescue, terrorism, and psychology.

Wildfire

Related to drought conditions are wildfires. Overall Fresno County is considered to have a moderate risk of wildfires. An exceptional year was 2020 when over 400,000 acres burned in Fresno and Madera Counties. This was the result of two incidents—the Creek Fire (379,895 acres) which occurred in Fresno and Madera Counties, and the Mineral Fire (29,667) which was in Fresno County exclusively. According to riskfactor.com, the City of Fresno has only a moderate risk of wildfires over the next 30 years.²

Figure 20: Acres burned by wildfires in Fresno County (Source: CalFire www.fire.ca.gov/incidents)

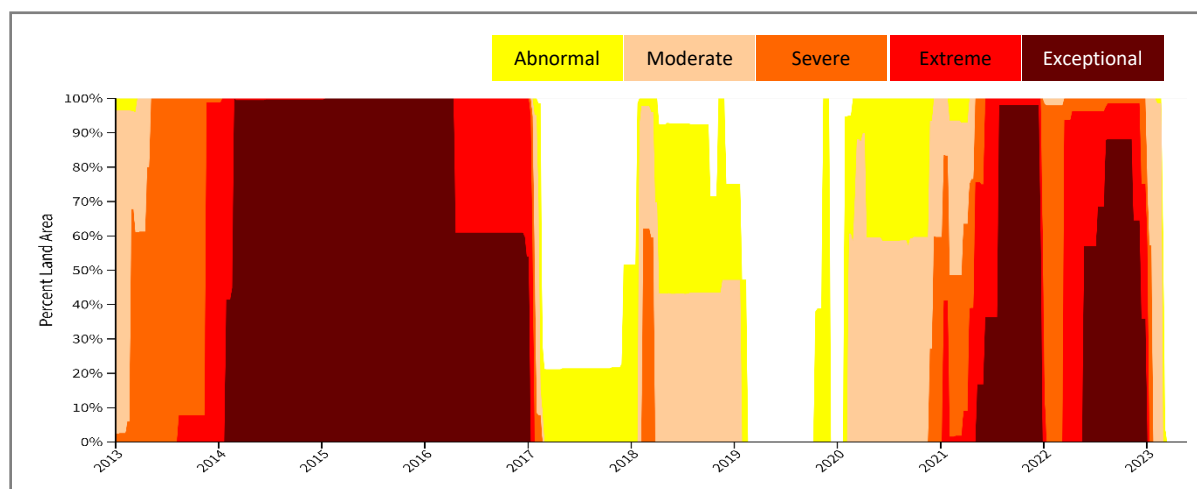
FIRES	2022	2021	2020	2019	2018
Acres Burned	408	517	414,081	283	246

² Riskfactor.com is a tool created by the nonprofit First Street Foundation to help agencies and individuals understand the risk and impact of natural disasters.

Drought

California's severe drought has been a decades-long safety and an economic problem for residents, farmers, ranchers, and any business that uses water as a primary input. The chart below shows the severity of drought conditions in Fresno County each year from 2013 to 2023. During the worst years (2014 to mid-2016) 100% of the land area in the county experienced exceptional drought conditions. Things improved until the latter half of 2021 and 2022 when a majority of the land area was considered to be in exceptional or extreme drought conditions.

Figure 21: Severity of drought conditions in Fresno County from 2013 to 2023; measured by the percentage of land affected. (Source: National Integrated Drought Information System, www.drought.gov)



Flooding

The Fresno Metropolitan Flood Control District (District) is a special-purpose district created in 1956 to acquire and construct facilities for flood control and for water conservation. The District develops plans with local public safety agencies to respond to the unlikely event of a dam failure and provides Clean Water Act compliance assistance to businesses and industries that are subject to these regulations.

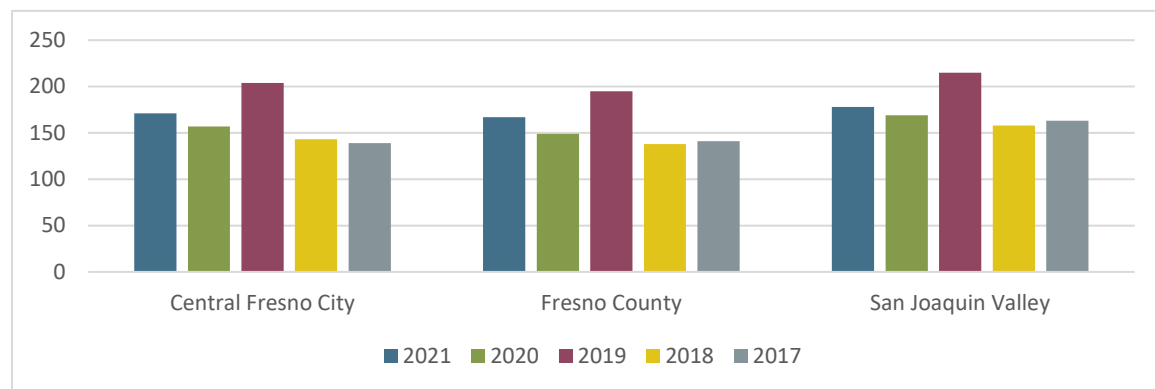
The Fresno/Clovis urban area is protected by 3 dams and seven large detention basins, and is served by a system of more than 700 miles of pipeline and more than 150 stormwater retention basins and more than 20 stormwater basins developed for recreation use. According to the District, in the event of a worst-case scenario dam failure, the areas that could expect to be most impacted by flooding are 1) areas east of Highway 168 (Shaw, Herndon, Shepard Avenues); 2) west of Highway 99 (Shields, Olive Avenues); and 3) any neighborhood or business touching Highway 41.

The control district has inundation maps online where one can look up locations in Central Fresno County to see if the area would be affected by potential flooding.

Air Quality

The San Joaquin Valley Air Pollution Control District (District) includes Fresno County and seven other counties within the region spanning from San Joaquin to Kern. Primary contributors to air quality problems in the region are population growth, emissions from traffic on two of the state's major transportation routes (Interstate 5 and Highway 99), farm equipment, and wildfires. Geography also plays a role in air quality. Surrounding mountain ranges can cause air pollutants (generated locally and regionally) to concentrate in the valley. Pollutants may be trapped in the valley if prevailing winds are not able to rise over the mountain ranges. All these factors combine to make it difficult to meet federal air quality standards for Ozone (smog) and Particulate Matter (PM). The District is continuously investing in clean air projects to help reduce emissions.

Figure 22: Number of "good air days" (Source: San Joaquin Valley Air Pollution Control District, Web-based Archived Air Quality (WAAQ) System)



Seismic Stability

Most of Fresno County is situated within an area of relatively low seismic activity but there are fault systems that have the potential to produce high-magnitude earthquakes in the county. Among the more notable active or potentially active faults within and adjacent to Fresno County are San Andreas (to the west), Garlock (to the south), and Sierra Nevada (to the east). According to the U.S. Geological Society (USGS) maps, most seismic activity occurs to the west of Fresno County and to the east in the Sierra Nevada Mountains. The primary seismic hazard in Fresno County is ground shaking.

Housing

Housing is important to economic development as places for workforce to live and also how the regional construction industry, as an employer and gross regional product generator, may grow or change based on trends in housing.

Since the Great Recession (2007-2010) ended in California and housing prices increased through the 2010s and in the immediate time after the pandemic's grip loosened, communities throughout California have wrestled with how to approach housing in terms of mix and quantity. Those choices have effects on housing affordability, housing equity and the flows for Fresno's construction industry.

Housing prices can be a measure of perception of affordability as much as a real measure of how regional incomes can afford housing. Fresno only recovered housing price peaks before the Great Recession in 2020, as prices were surging due to the pandemic's favorable conditions. Looking at the state average as a comparison in Figure 23, Fresno has relative affordability versus other parts of California, which can be an economic and workforce development asset. Figure 24 shows that the outlook for housing toward summer 2024 is positive, reversing trends that were dragging home prices down after July 2022.

Figure 23: Median Home Price Comparisons, Fresno and California, January 2000-June 2023, Current Dollars (Source: Zillow™ Research)

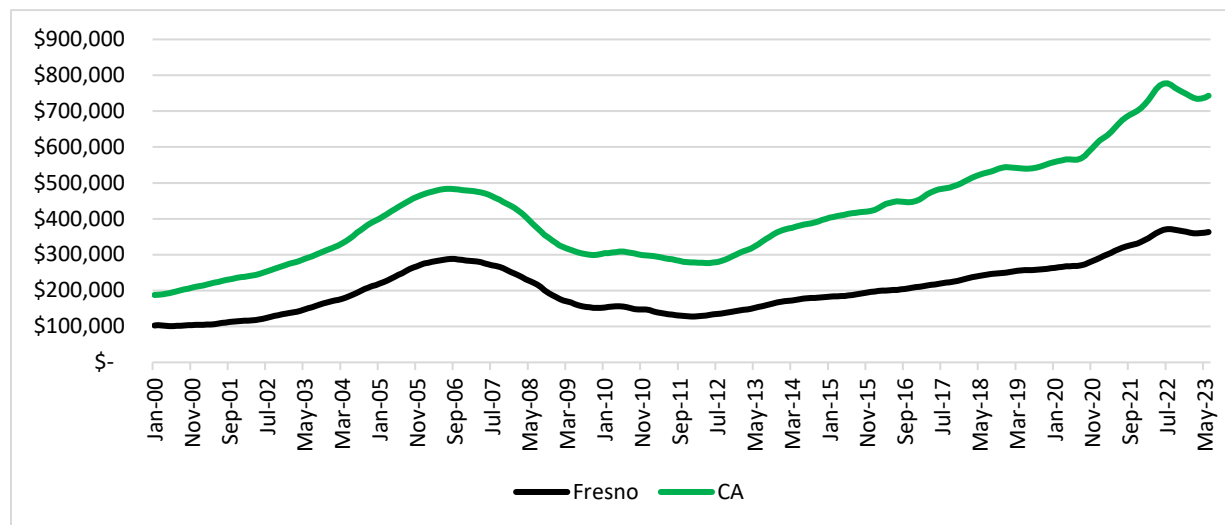
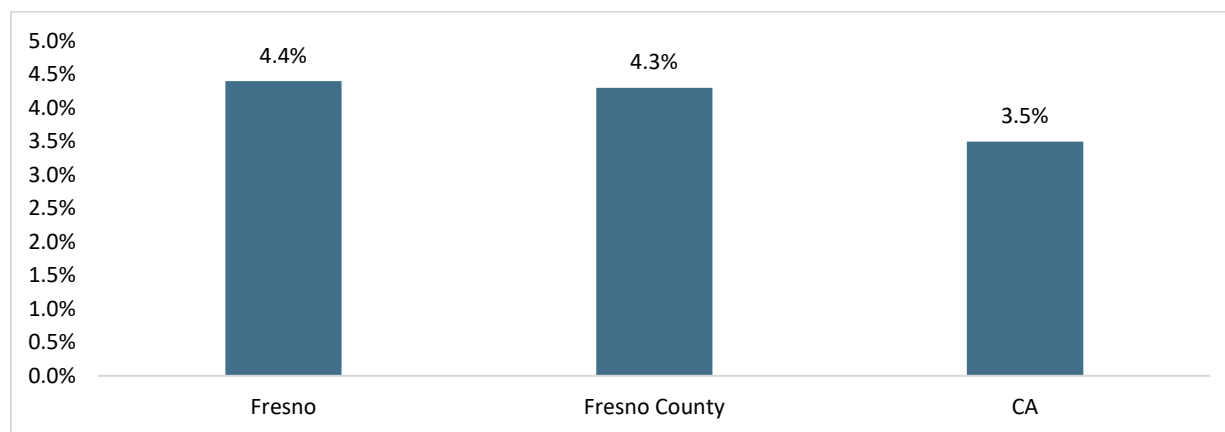


Figure 24: Forecast for Change in Median Home Price, June 2023-June 2024, Fresno, Fresno County and California, % Change (Source: Zillow™ Research)

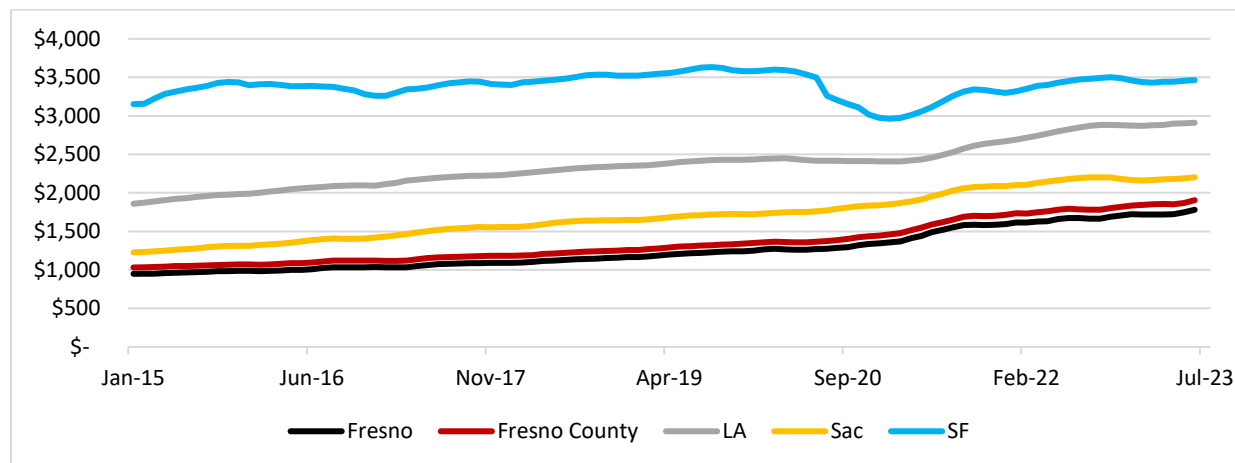


Rentals

Figure 25 displays rental prices from January 2015 to June 2023, which shows continued growth before the pandemic and then the confounding shock of the pandemic on rental prices. Notice how San Francisco (SF) had rental prices drop during the initial shock of the pandemic, but then recovered. For Fresno, in contrast, rental prices continued to rise alongside home prices. Such increases compound

affordability issues as residents do not have a market that is providing relief. Fresno, as we see later, had population growth during and after the pandemic, providing some momentum for both home rental and purchase prices to rise.

Figure 25. Median Rental Prices, January 2015 to July 2023, Current Dollars/Month, Fresno and Selected Comparison Areas (Source: ZillowTM Research)

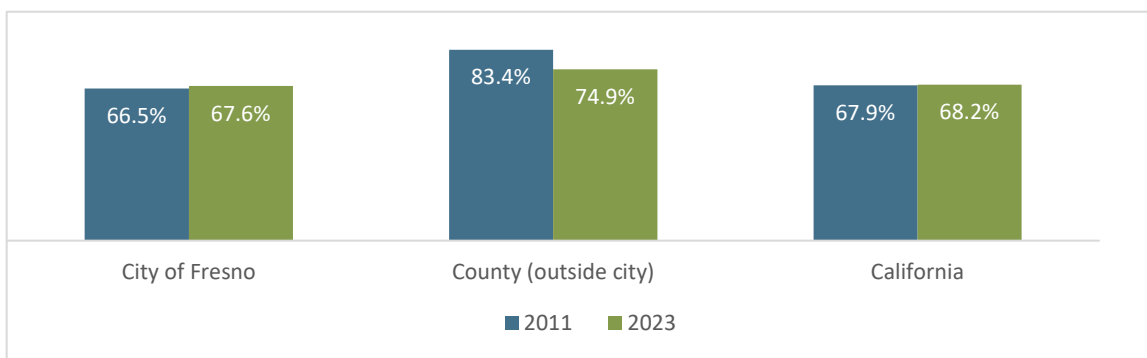


Housing Mix

Data on housing mix help understand Fresno’s housing stock in volumes of single-family “detached” homes, condominiums as for-sale products primarily (single-attached) and then an array of multi-family homes that are primarily for rent (two or more units, generally attached and in a “complex”).

The mix of single-family homes (detached, attached, and mobile homes) compared to multifamily homes has remained consistent in Fresno since 2011 (66.5% single family to 33.5% multifamily). In 2023 Fresno experienced a slight increase in single family homes (67.6%). It remains to be seen if this is a trend.

Figure 26: Share of single-family homes as percent of total housing units (Sources: California Department of Finance, Census Bureau)

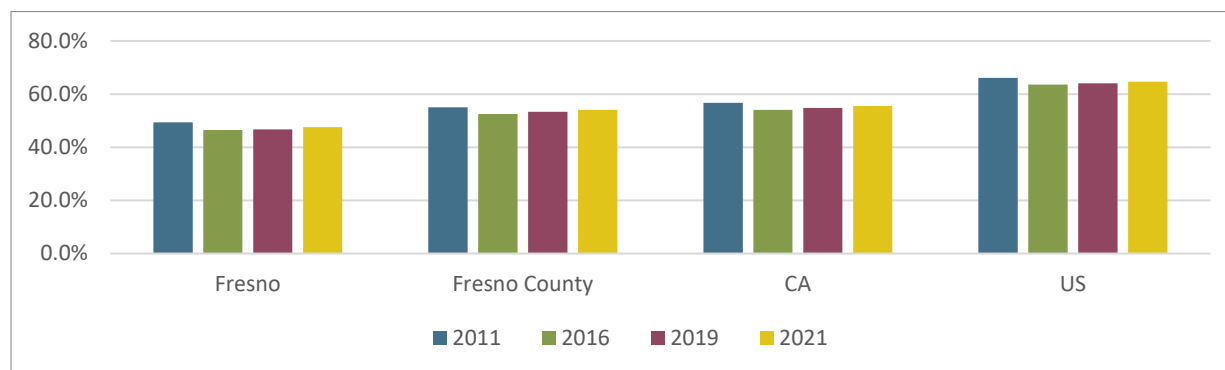


The importance of housing mix is that it can signal a region’s infrastructure and social evolution. A lack of homes to purchase with a certain mix of larger and smaller homes may signal to a current or potential employer that workers will not be able to own easily in the region, may have to commute long distances to get to work, and may be difficult to retain. Housing prices and mix can also affect the types of households that form, which can affect the overall population, the currently available workforce and also K-12 school attendance. These data provide a signal of both workforce development volume and possibilities as well as how the market in Fresno may be affecting regional choices.

Housing Burden and Tenure

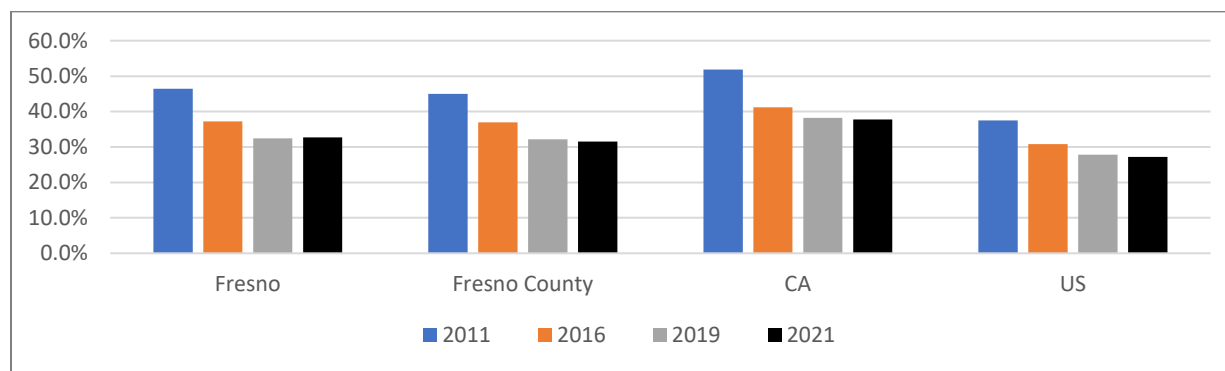
Rental prices have continued to climb since 2011. Figure 27 looks at the estimated percentage of owner-occupied homes versus renter occupied—Fresno is a city where renters occupy a larger proportion of the housing stock versus homeowners especially when compared to the county, state, and US.

Figure 27: Housing Tenure, Percentage of Owner-Occupied Homes, 2011 to 2021, City of Fresno, Fresno County, California Statewide, United States (Source: Census Bureau, American Community Survey)



When renters are a relatively large proportion of the housing stock, the cost of rents as a ratio of household income may be relatively large also, which leads to more renters spending 30% or more of their income per month on rent. This is known as a “housing burden.” Fresno and Fresno County show relatively high housing burden levels, though the state on average (due to larger urban-area rents) shows generally more burden. These data are shown in Figure 28.

Figure 28: Housing Burden, % of Total Housing Stock Rented, 2011 to 2021, City of Fresno, Fresno County and California Statewide, and United States (Source: Census Bureau, American Community Survey <http://data.census.gov>)



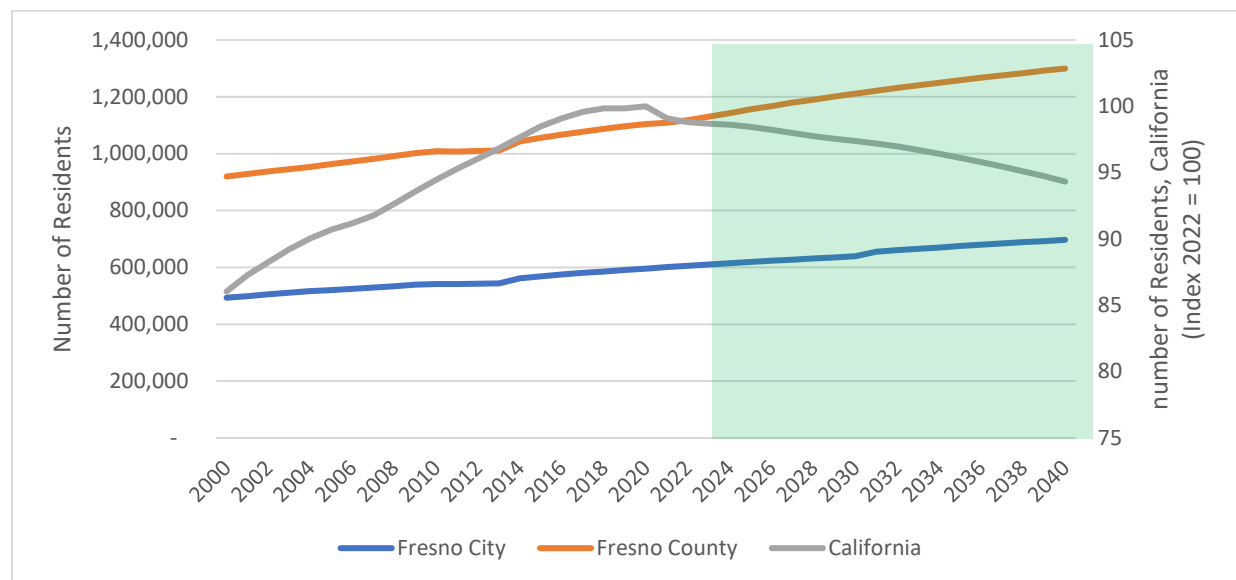
SOCIAL ENVIRONMENT

In this section we consider demographic and socio-economic data about the City of Fresno compared to Fresno County, California and other selected areas.

Population

The state of California lost population the last two years and it is expected that this decline will continue for a third year. This is the first time in recorded history that California has lost population. Further, the out-migration includes a greater share of those with a college degree. Based on California Department of Finance (DOF) and California Department of Transportation (CalTrans) demographers, the state of California is likely to see a continued decline in statewide population to 2040 from the pandemic period (2020-22).³ Unlike the state, Fresno County and Fresno City are on a path of population growth toward 2040.

Figure 29: Population (2000 to 2022) and Forecasts (2023 to 2040), Fresno, Fresno County and California (Index, 2022 = 100), Fresno City Population = 543,428 (Forecasted Years in Shaded Area) (Sources: California Department of Finance, Census Bureau and CalTrans)



Age and Ethnic Mix

The age profile (Figure 30) of Fresno's residents has matured. This is not unique to Fresno, and coastal California, especially parts of the Bay Area, are aging faster. Almost 40% of Fresno's population is between 25 and 55 years old, prime earning and parenting years.

³ Cain, Bruce and Hehmeyer, Preeti. *California's Population Drain.* Stanford Institute for Economic Policy Research (SIEPR). October 24, 2023.

Figure 30: Age Mix of Population, Fresno, 2011 and 2021 (Source: Census Bureau, American Community Survey)

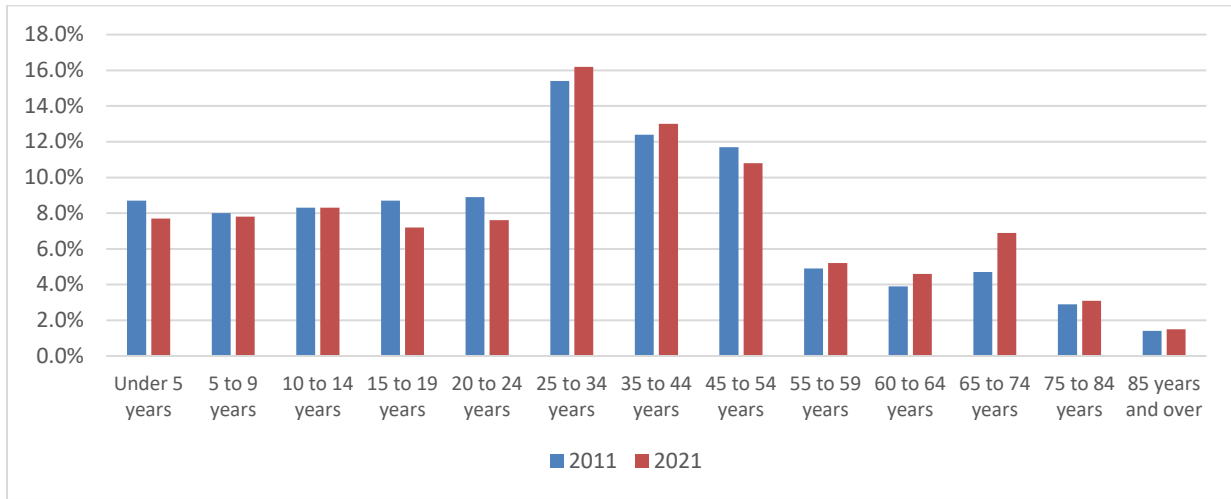
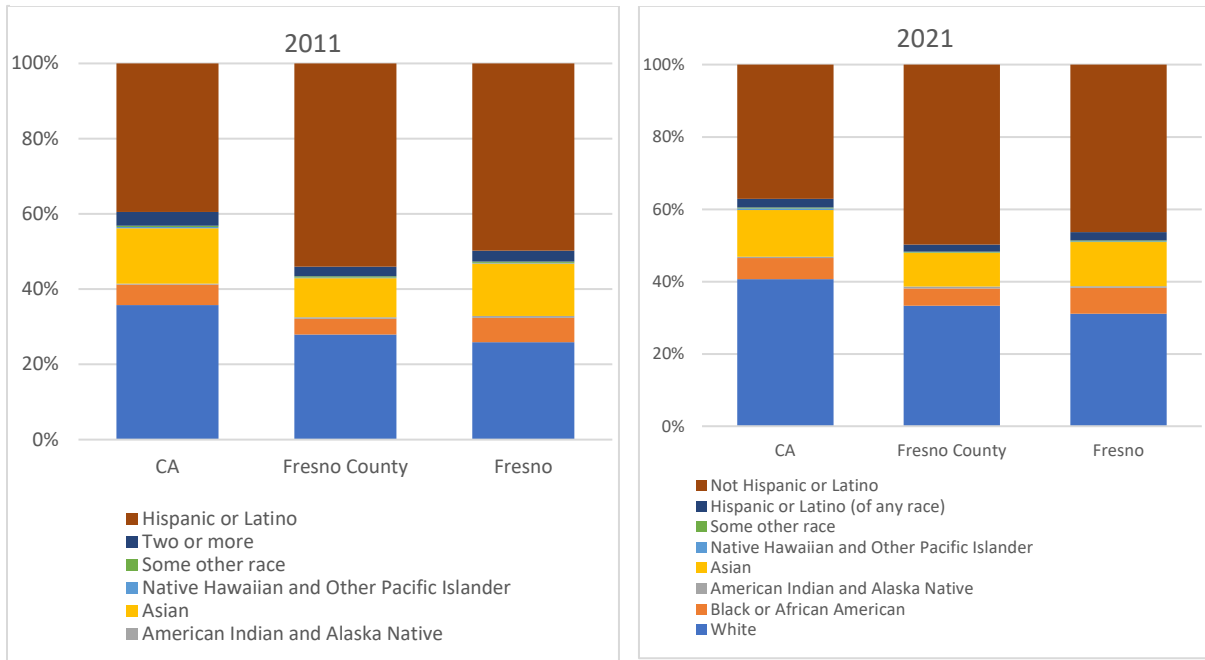


Figure 31 shows the ethnicity and racial mix of Fresno’s population contrasted to Fresno County and California.

Figure 31: Ethnic Mix of Population, Fresno, 2011 and 2021 (Source: Census Bureau, American Community Survey)



Income and Poverty

Median household income (MHI) is a classic measure of the economic progress of residents. MHI is also the basis of housing affordability measures, usually considered on a monthly basis versus the current rental prices or monthly costs of home ownership. Figure 32 looks at the inflation adjusted MHI for Fresno as a city, Fresno County, California on average, and the national average.

The median household income in the city of Fresno experienced a 10-year average annual increase of 0.71% which is more than Fresno County (0.23%) or the State of California (0.68%).

Figure 32: Median Household Income, 2011 to 2021, City of Fresno, Fresno County and California Statewide, Current and 2023 Dollars (Using Statewide Prices), Selected Years (Source: Census Bureau, American Community Survey)

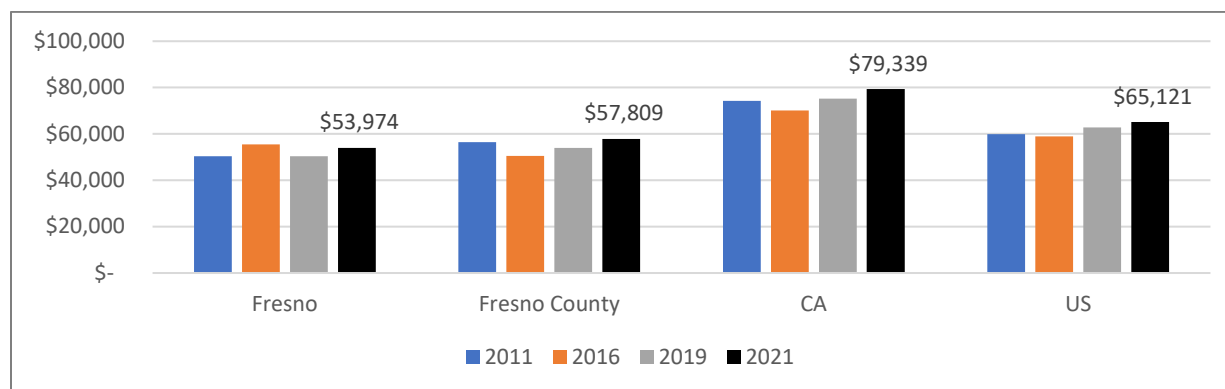
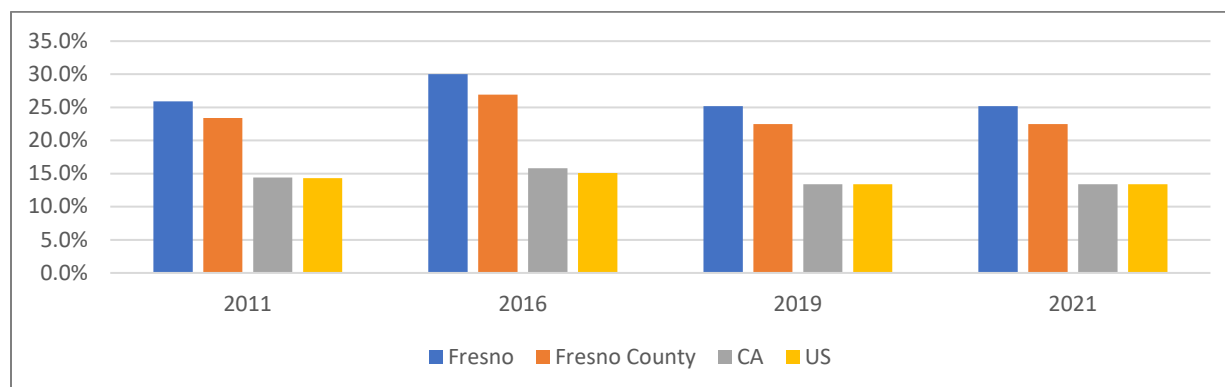


Figure 33 shows comparative poverty rates, where poverty is based on the federal poverty line (three times the estimated food budget for a household of four people) and what percentage of residents in each area are estimated to have a household income below that level.

The poverty level in the city of Fresno remains higher than the county, state, and nation over the time period shown. After an increase from 25% to 30% from 2011 to 2016, the level returned and remains at 25%. The increase in 2016 and subsequent decrease in 2021 is seen in each of the comparison areas.

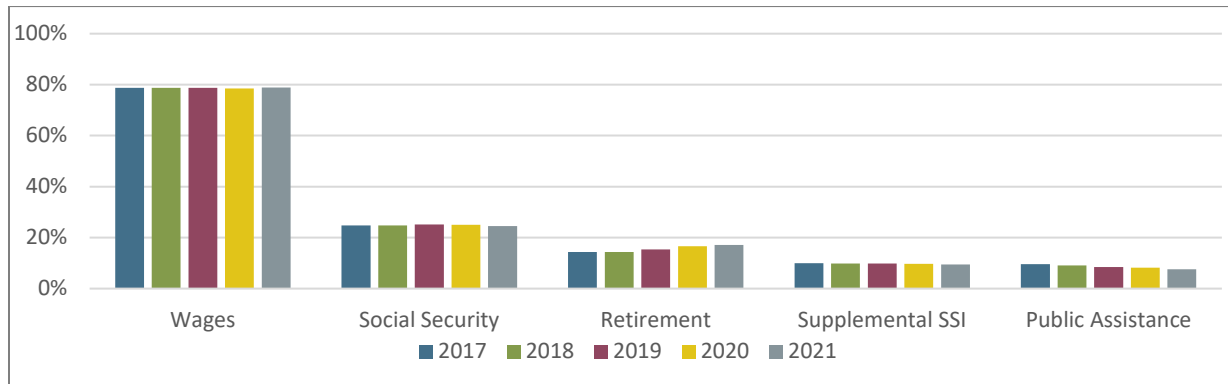
Figure 33: Poverty Rates, 2011 to 2021, City of Fresno, Fresno County and California Statewide and National Average, Percent of Residents with Current Household Income below federal poverty level, Selected Years



Sources of Income

The share of personal income from earned wages is substantial (79%) but has remained unchanged from 2017 to 2021. Small changes in the source of income are 1) a slight increase in the share coming from retirement (14% to 17%) which is another indication of an aging population; and 2) a slight decline in the share from Public Assistance (10% to 8%). The fact that a large majority are receiving income from wages suggests that people are in Fresno to work.

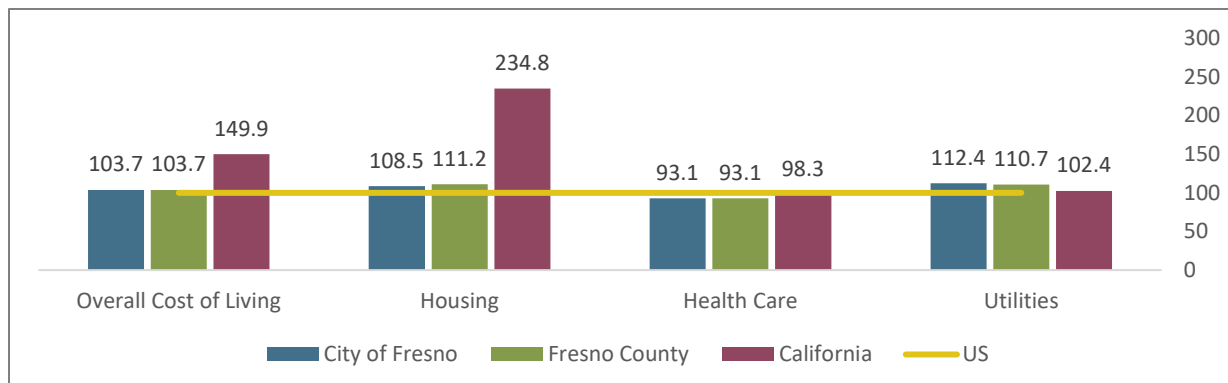
Figure 34: Sources of Income, city of Fresno (Source: Census Bureau, American Community Survey 5-Year Estimates)



Cost of Living

Cost of living indices are based on a U.S. average of 100. The chart below presents the cost of living in the city of Fresno compared to Fresno County and the state of California. Fresno's 103.7 overall cost of living means that it is nearly 104% more expensive to live in Fresno relative to the U.S. average. Fresno's cost of living is much more affordable than the state average (150%). The cost of utilities and housing are the two major components of the higher cost of living.

Figure 35: Cost of living comparison. (Source: Sperling's Best Places, Oct 2023)



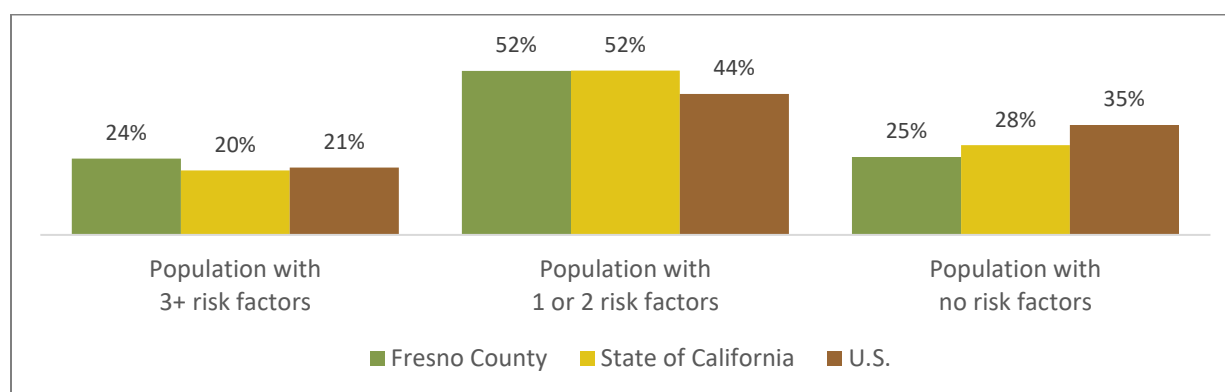
Health and Safety

This section looks at several factors that indicate the population's risk, equity, and safety. The intent of these data is to give community leaders an indication of the local population's capacity to respond, absorb, endure, and recover from the effects of a disaster or economic shift.

At-Risk Population

The Census Bureau's Community Resilience Estimates (CRE) measures how at-risk populations are based on several factors including but not limited to poverty level, senior population, single parent households, households with no vehicle. Over half of Fresno County (and surrounding counties) have one or more risk factors. This is in line with the state but higher than the nation.

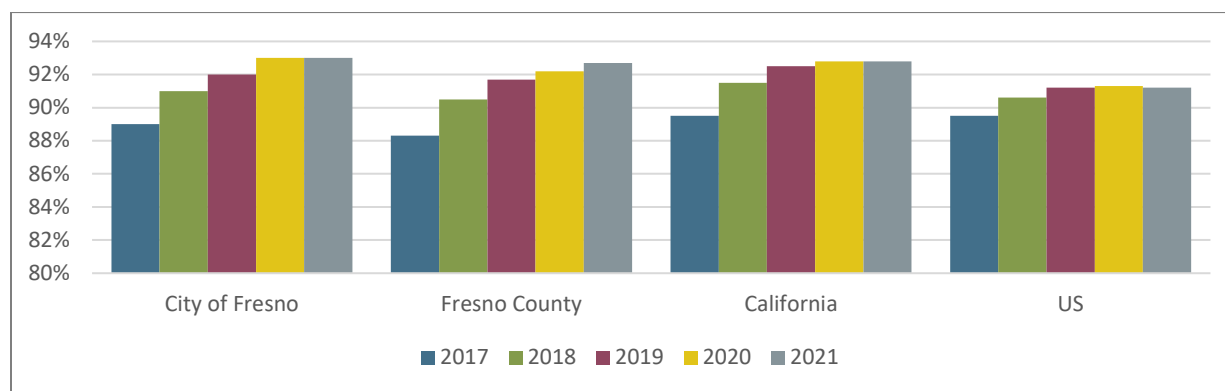
Figure 36: 2021 Fresno County At-Risk Community Resilience Estimates (Source: US Census Bureau, data collected 10/2023)



Health Insurance Coverage

The share of the city's and county's population with some type of health insurance coverage has improved over the last five years. The 2021 data indicates a greater share of the Fresno population is covered with health insurance than the nation's population.

Figure 37: Civilian Noninstitutionalized Population with Health Insurance Coverage (Source: US Census, ACS 5-Year Estimates)



Unhoused Population

According to the Fresno Madera Continuum of Care (FMCoC) Point in Time (PIT) County, 4,493 persons were experiencing homelessness as of January 24, 2023. This represents a 7% increase from 2022.

The forces which affect homelessness are complex and often interactive in nature. Social forces such as addiction, family breakdown, and mental illness are compounded by structural forces such as lack of available low-cost housing, poor economic conditions, and insufficient mental health services. People who experience homelessness place an increased burden on the government and taxpayers which impacts the local economy. People without housing are high consumers of public resources and generate expenses, rather than income, for the community.

Child Care

Child care is at the core of the U.S. economy. Children rely on child care services for safe, enriching early learning environments, parents rely on the services of child care providers so that they can pursue work or school and build financial stability to provide for their families. Businesses rely on the child care sector to ensure a stable workforce and consumer base.

Lack of affordable quality child care is a barrier to economic growth. Without a safe and accessible place for young children to go, workers (particularly women) are limited on employment and educational opportunities, and therefore less able to earn money to help support the family.

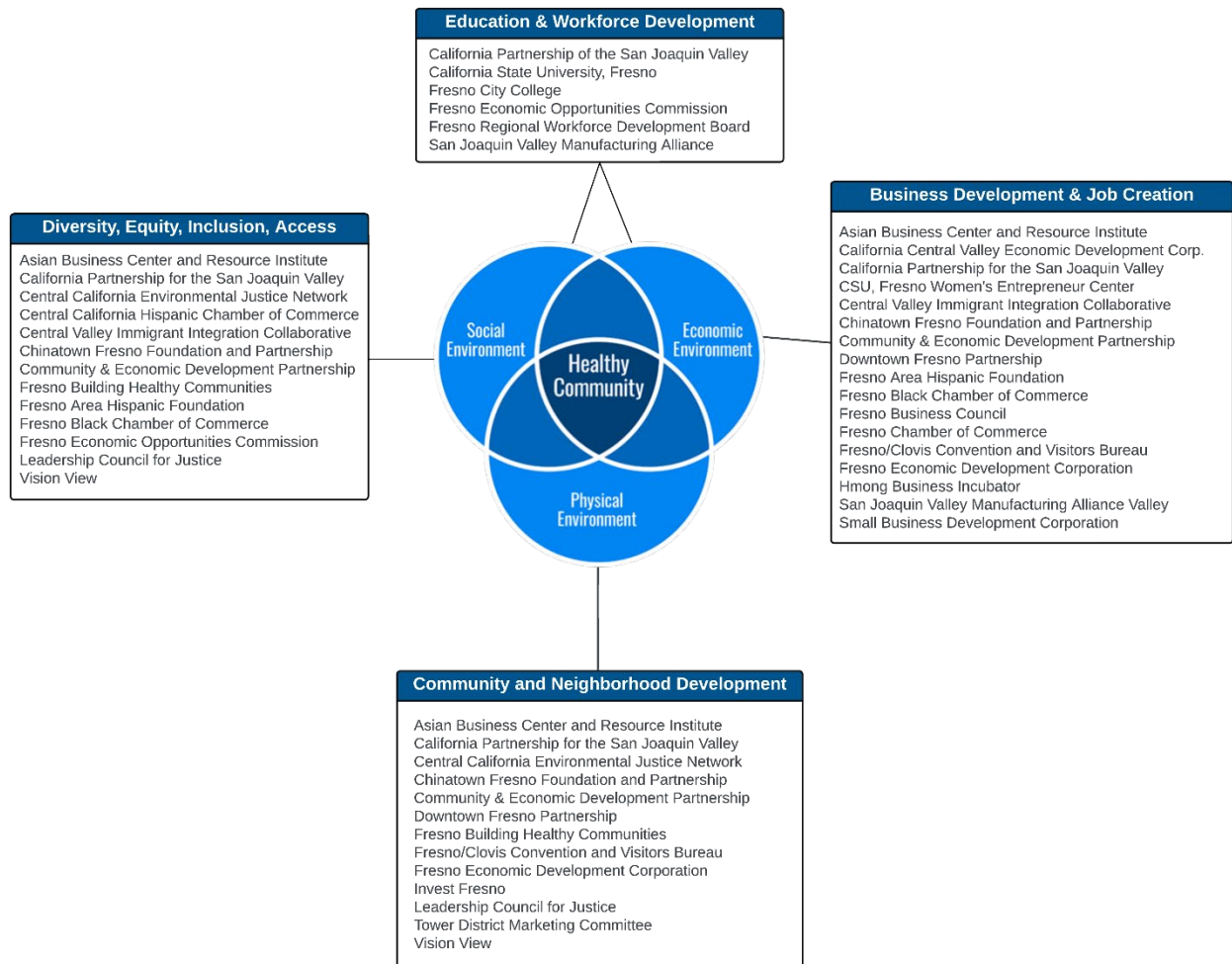
Fresno is not meeting the demand for affordable, quality child care. Only 23% of children (aged 0-12) of working families are provided with child care services, leaving 77% of working families unserved. Only 15% of infants and toddlers of working families have access to care.⁴ Leaving an untapped workforce at home to take care of children in a time when many jobs go unfilled is a missed opportunity for economic growth for the city and for achieving financial stability for many Fresno families.

⁴ Fresno County Child Care and Development, Local Planning Council, Early Care and Education, October 2023

APPENDIX C: Organizational Ecosystem

The City of Fresno and the greater Central Valley region enjoy a substantial and proactive ecosystem of organizations and initiatives working independently and collaboratively to protect and improve the economic future of the region. Below is a listing and summary of the organizations and work being done by each organization.

One of the most important roles the City of Fresno can play in this ecosystem is strategic coordination. This includes connecting groups, ensuring information flows among the organizations, protecting against duplication of efforts and conflicts.



Asian Business Center and Resource Institute (ABIRC) www.fresnoabirc.org supports and promotes Asian business owners in the Central California region by providing networking opportunities and programs such as the first Hmong Cohort in the Central Valley, fundraisers for local schools, and partnerships with local non-profit organizations.

Building Healthy Communities www.fresnobhc.org is working to build a foundation for a healthier community by creating social capital, bridging diverse organizations through an informed, engaged, and active citizenry.

California Central Valley Economic Development Corporation (CCVEDC) www.centralcalifornia.org was formed in the late 1980s by the professional economic development organizations serving California's Central Valley counties as a marketing collaborative. CCVEDC and its members present the region as a competitive business location to companies, site selectors, brokers and developers.

California Partnership for the San Joaquin Valley www.sjvpartnership.org is hosted by the Fresno State University Office of Community and Economic Development. The SJV Partnership provides an organizational framework for collaboration to improve the quality of life in the San Joaquin Valley by focusing on creating a prosperous economy, quality environment, and social equity throughout the valley through eleven regional work groups (Advanced Communication, Air Quality, Economic Development, Housing, PreK-12 Education, Sustainable Communities, Water Quality, Supply and Reliability and Workforce Development).

California State University, Fresno www.fresnostate.edu is home to about 25,000 students, over 70 bachelor and 48 master programs. The University's strategic goals are to enhance personal well being and professional fulfillment, bridge the campus and community, cultivate regional progress, modernize facilities and technology, and embody full inclusivity.

California State University, Fresno Women's Entrepreneur Center www.centralvalleywec.org is a partnership program with the Small Business Administration (SBA) that offers a variety of business support services to assist women in starting, growing, managing, or selling their small business.

Central California Environmental Justice Network (CCEJN) www.ccejn.org is a coalition of grassroots environmental justice groups and individuals dedicated to preserving natural resources, minimizing or eliminating negative environmental impacts, and supporting environmental health education, community organizing, collaborative dialogue, and political involvement in rural, low-income and underserved communities of color in the San Joaquin Valley.

Central California Hispanic Chamber of Commerce www.cchcc.biz fosters economic growth that creates and sustains prosperity for the benefit of all people while promoting the awareness and preservation of the Hispanic culture. Services include education and networking opportunities, access to capital, and other business connections.

Central Valley Immigrant Integration Collaborative (CVIIC) www.cviic.org is dedicated to ensuring full participation of immigrants in building strong, vibrant, inclusive communities. Programs and services include entrepreneurship, small business support, training, grants and financing assistance.

Chinatown Fresno Foundation and Partnership www.chinatownfresno.org was formed to foster civic pride and enhance quality of life by generating funds to support the improvement of the social, physical, and cultural environment of Historic Chinatown Fresno.

Community & Economic Development Partnership (Fresno CDEP) www.fresnocedp.org is a community-based organization formed to build community and economic development capacity in Fresno neighborhoods with median household incomes below the poverty. Through policy, preparation, participation, and production CDEP helps build strong leaders for the civic infrastructure in Fresno.

Downtown Fresno Partnership www.downtownfresno.org leads efforts to create downtown as a vibrant hub of business activity by promoting its image, supporting physical improvements and development, advocating for merchants, and hosting special events that bring new life to the historic core of the city.

Fresno Area Hispanic Foundation (FAHF) fresnoahf.org develops strategies and policies to better serve all Spanish and English-speaking business owners interested in the welfare of the Fresno-area Hispanic community. The Foundation offers a variety of services including office space, funding to help small business start-ups.

Fresno Building Healthy Communities (Fresno BHC) (www.fresnobhc.org) A coalition of community members working to build a foundation for a healthy community by creating social capital, bridging diverse communities and organizations, and empowering grassroots leaders. Primary focus is on Southeast, Central, and Southwest Fresno.

Fresno Business Council (FBC) <http://www.Fresnobc.org> was founded in 1993 by business leaders as a catalyst for change and to tackle economic and social issues in the community. The Council creates and implements collaborative strategies and community initiatives including the Center for Advanced Research & Technology (CART), the Choosing Our Future Report, the Human Investment Initiative, and the San Joaquin Valley Manufacturing Alliance.

Fresno Chamber of Commerce www.fresnochamber.com promotes and supports the success of the regional business community through effective advocacy, education and relationship building.

Fresno City College www.fresnocitycollege.edu as California's first community college, Fresno City College is dedicated to working collaboratively to enhance the economic and social development of the region and providing access to equity-centered, innovative educational programs.

Fresno/Clovis Convention & Visitors Bureau www.visitfresnocounty.org is a destination marketing organization that is dedicated to promoting the Fresno/Clovis region to travel markets.

Fresno County Economic Development Corporation (Fresno EDC) www.fresnoedc.com is a public/private nonprofit organization established to market Fresno County as the premier location for business locations. The EDC collaborates with business, government and civic leaders to maximize the area's economic prosperity and global competitiveness, facilitates site selection for new and expanding businesses, and assists in the retention and expansion of businesses through alliances with collaborative partners and resources.

Fresno Economic Opportunities Commission (EOC) www.fresnoeoc.org established in 1965, is one of the nation's largest Community Action Agency. EOC offers over 35 programs that help people become self-sufficient, including preschool education, vocational training, youth recreation, senior citizen hot meal services, energy conservation education, crisis intervention, preventive health care, prenatal nutrition education, vocational counseling and job placement.

Fresno Metro Black Chamber of Commerce www.fmbcc.com works to advance the interests of the Black business community by delivering value-added services and opportunities to members and the community at-large with programs and resources that support an open, thriving market without social, economic or political barriers.

Fresno Regional Workforce Development Board www.frwdb.net is a Joint Powers Authority between the City of Fresno and the County of Fresno established to manage Workforce Innovation and Opportunity Act (WIOA) funding, and to provide services that will ensure participants find jobs and that businesses have access to a skilled workforce.

Hmong Business Incubator Center www.hbicenter.org empowers individuals in underrepresented and underserved communities to overcome challenges in navigating business systems and creates an entrepreneurial environment that encourages innovation in the Hmong community.

Invest Fresno (investfresnoc.com) is a coalition of community leaders, residents, and local business owners working to create opportunities and growing the economy to help raise the standard of living, create more career opportunities, improve neighborhoods and strengthen community services.

Leadership Council for Justice www.leadershipcounsel.org through community organizing, research, communications, legal representation, and policy advocacy, the Leadership Council aims to influence land use and transportation planning, public investment priorities, guide environmental policy, and promote the provision of basic infrastructure and services.

San Joaquin Valley Manufacturing Alliance (SJVMA) www.sjvma.org is an organization of the Valley's manufacturing leaders working together to advance industry and create a world-class workforce at the local level by developing resources, collaborating with education, hosting special events and industry specific sector roundtables.

The **Tower District Marketing Committee** (www.towerdistrict.org) is a nonprofit organization established to promote and develop commerce, community, and the cultural environment in Fresno's Tower District through special events and planned economic development.

Valley Small Business Development Corporation (VSBDC) www.vsbdc.com is a nonprofit, public benefit, small business development corporation authorized to make direct loans to farmers and small businesses, provide technical assistance and financial literacy, and to guarantee small businesses and family farms with increased access to capital.

Vision View (www.communityvisionca.org) promotes economic justice and alleviates poverty by increasing the financial resilience and sustainability of community-based nonprofits and enterprises, creating opportunities to make socially responsible investments that revitalize Northern and Central California communities.

APPENDIX D: Economic Centers

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Introduction

The City of Fresno has ten distinct economic opportunity areas or centers (Centers) that are or can be developed or further developed to retain and create jobs and significantly increase economic activity. The business activity in the Centers generates millions in revenue for the City through sales, property, and lodging taxes and provides diverse employment options for Fresno area workers.

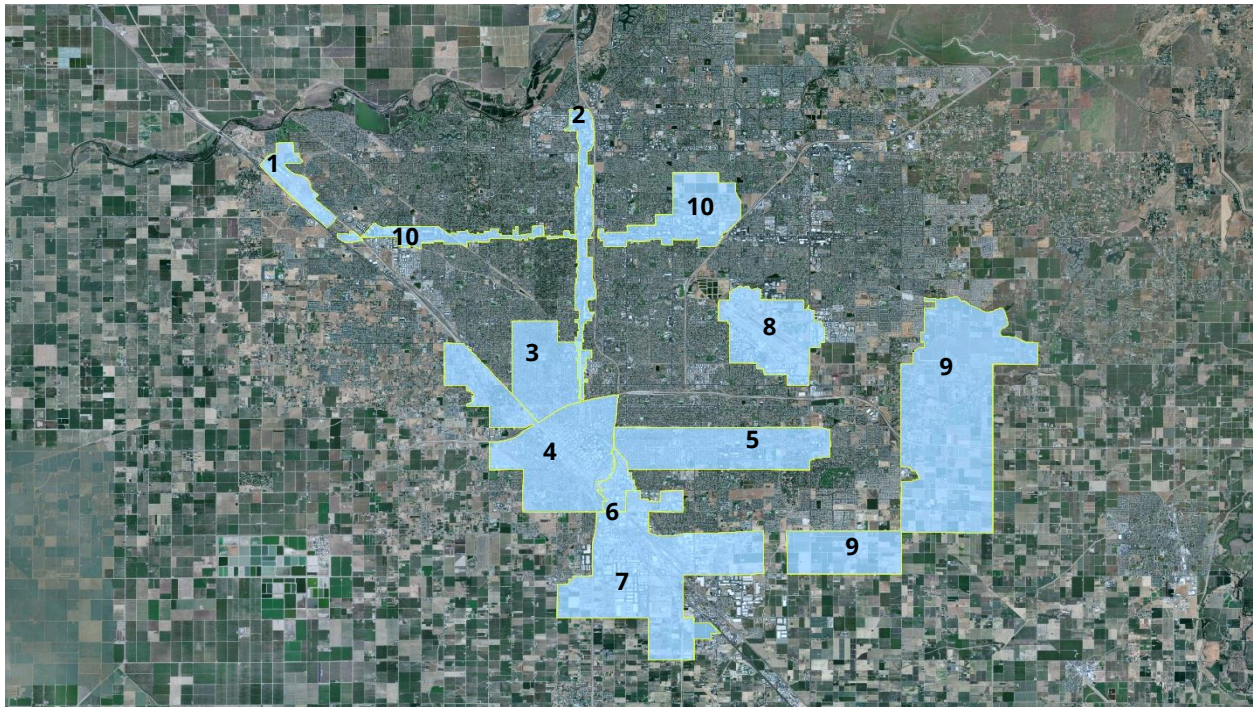
The economic health of these Centers is essential to improving and sustaining Fresno as a healthy community, one with balanced economic, physical, and social environments. Also, understanding how each Center functions from an economic development perspective is important to understanding and planning for future economic and job growth, diversification, and resiliency.

The Centers profiled here include potential opportunities for new and in-fill development, renovation and enhancement of space and use.

Improvements to the Centers will make them and the City more competitive and attractive to employers, help to diversify the economy and provide jobs for a range of skilled workers.

Starting from the City's most northern boundary and moving southeast, the Centers are summarized and mapped on the next page and further described on the following pages.



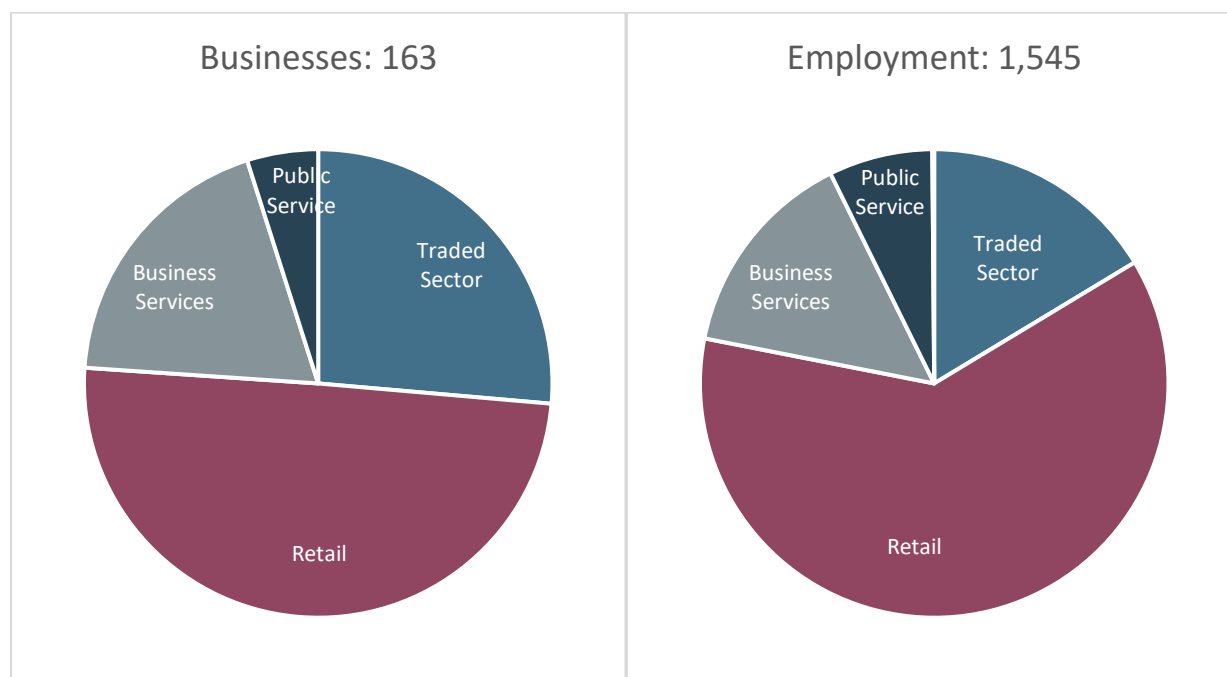


ECONOMIC CENTER	ACRES	BUSINESSES	EMPLOYMENT	REVENUE ¹ (\$MILLION)	OPPORTUNITIES
1 Herndon-Highway 99	678	163	1,545	\$2.5	Light industrial and commercial
2 Blackstone Corridor	1,286	1,270	15,070	\$25.8	Primarily retail
3 Tower District	1,850	721	6,551	\$1.2	Residential, limited retail or commercial
4 Downtown-Chinatown	4,474	2,325	38,265	\$5.1	Retail, commercial, possible residential
5 Kings Canyon-Ventura Corridor (Hwy 180)	2,893	755	7,145	\$4.7	Retail, commercial, and transit-oriented uses
6 South Van Ness Industrial Area	416	148	1,701	\$1.2	Industrial
7 South Central Specific Plan Area	5,562	642	18,539	\$31.7	Industrial and distribution
8 Fresno Yosemite International Airport	2,259	848	11,650	\$5.4	Light industrial
9 Southeast Development Area (SEDA)	8,621	73	474	\$0.0	Long-term industrial
10 Shaw Avenue	2,580	2,104	23,637	\$12.2	Retail and commercial
TOTAL	30,619	9,049	124,577	\$89.8	

¹ Most recent four quarters sales tax revenue (3Q2022 to 2Q2023) in \$millions. Source: MuniServices, City

Herndon Avenue & Highway 99

The 678-acre Herndon Avenue and Highway 99 Economic Center is a mix of primarily retail, business and professional services and some light industrial uses. The Center's northern boundary is Herndon Avenue and extends to just north of Market Street. The east/west boundary includes the area between Highway 99 and Riverside Avenue.



EXISTING CONDITIONS AND RECENT INVESTMENT

- Veterans Boulevard Interchange and Corridor Improvement Project was a \$140 million investment that improved accessibility, circulation, traffic flow, reduced congestion in northwest Fresno and will accommodate light industrial development. Veterans Boulevard is partially open.
- Marketplace at El Paseo is a 650,000 square foot regional retail and commercial center located south of W. Herndon Avenue between Golden State Blvd and N. Riverside Drive. The center is anchored by several big box stores, restaurants, and entertainment venues (Target, Burlington, Old Navy, Ulta, Olive Garden, Regal Cinemas) and includes a Tesla charging station.
- Riverside Drive and Herndon Avenue intersection is the expected location for the world's largest Costco. The 22-acre, 241,000 square foot center will double as an e-commerce fulfillment center. Jobs will be a mix of entry level, management, and professional (pharmacy, etc.).
- There are early-stage plans for a 17-acre residential development (single family homes and luxury apartments) with elements of mixed-use.

ASSETS AND OPPORTUNITIES

- Veterans Boulevard—about 100 acres in the area between Golden State and Highway 99 is zoned light industrial. Once the interchange improvements are fully completed in early 2024 this area will

be ready and suitable for light industrial development. Primary infrastructure (sewer, water, etc.) is in place and will support light industrial uses. The City is currently completing off-site improvements e.g. streets, sidewalks, lighting, and landscaping. There are early-stage plans by a landowner within this Center to develop 60 acres for commercial and light industrial uses.

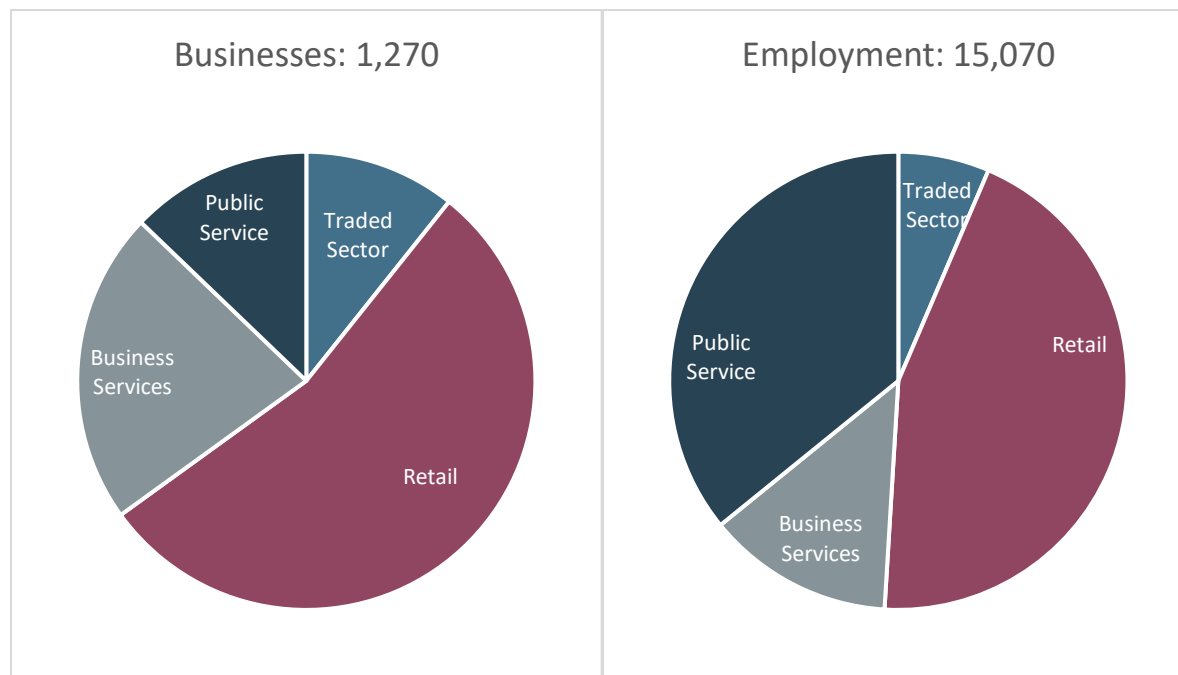
- A Union Pacific rail line runs along the east side of Golden State Highway, a competitive advantage when marketing to industrial users.
- The site will be served by high speed rail.

CHALLENGES

- Lead time of 18 to 24 months for installation of PG&E infrastructure.
- Potential environmental justice challenges.

Blackstone Corridor

Historically, an important retail area in Fresno, the 1,286-acre Blackstone Corridor is developing into strong mixed-use neighborhoods. This approximately eight-mile Corridor spans from Nees Avenue (north) to Highway 180; east to Highway 41 and west several blocks abutting residential areas.



EXISTING CONDITIONS AND RECENT INVESTMENT

- The Fresno Area Express' (FAX) a federal- and state-funded rapid transit line named "Q-Line" began service in 2018. The route spans 16 miles on Blackstone from N. Fresno St. to downtown and then east on Kings Canyon Road to Clovis Avenue. The Q serves Fresno's major shopping centers, hospitals, and employment centers.
- Blackstone and McKinley Avenues (intersection) is the site of an \$85 million dollar grade separation project funded by the state's Transit and Intercity Rail Capital Program and Measure C. The project includes raising a BNSF track over the avenues which will help to improve air quality, reduce traffic congestion, and improve safety for pedestrians, cyclists, and transit riders in the Fresno City College area. Construction is expected to occur from 2024 to 2027. Besides the expected traffic impacts during construction, some businesses will be relocated; mostly small businesses including some franchises. A multi-disciplinary group in the City's Capital Improvements Department is providing relocation assistance to the businesses.
- Façade Grant Program funded by \$1.5 million in American Rescue Plan (ARPA) funds supports repairing and modernizing buildings throughout the City of Fresno. Areas identified as priority for the funds were Chinatown, Downtown, Tower District, and Bus Rapid Transit and Transit Oriented Development areas around Blackstone and Kings Canyon.
- Manchester Center (Blackstone and Shields Avenue), an important anchor of Blackstone Avenue, is slated to be refurbished to mixed use which will include approximately 1 million square feet of

ground floor retail, office, dining, and entertainment, and nearly 600 second-story housing units (about 400,000 square feet of housing).

- The Link (Blackstone and East McKinley Avenue) near Fresno City College is a mixed-use development made possible with a variety of funding sources including state funding for offsite infrastructure. The Link includes 88 units of affordable housing, retail, commercial, and entertainment options. The development helps to connect the Fresno City College area to downtown Fresno, provides residents access to transportation, jobs, retail, entertainment, schools, and community services.

ASSETS AND OPPORTUNITIES

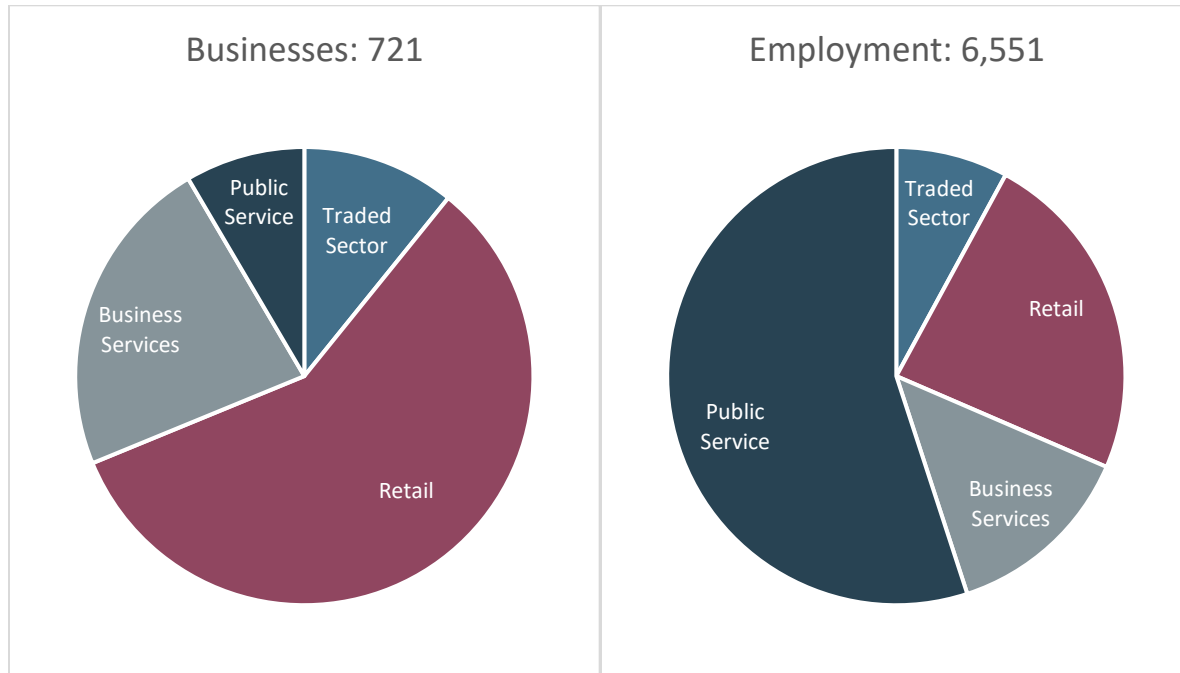
- Senior Center opening in 2025 will be the City's first activity center dedicated to the City's senior population. This 30,000 square foot facility will be located on Blackstone and Holland Avenue and will include an affordable housing development nearby.
- Retail and commercial development opportunities exist throughout the Center.

CHALLENGES

- Securing funding for off-site improvements, revitalization, and pedestrian amenities.

Tower District

Fresno's Tower District, surrounded by Downtown and the Blackstone Corridor is an eclectic pedestrian-oriented area with retail, restaurants, bars, and a diverse mix of housing options. The 1,850-acre District spans from Shields Avenue (north) to North Fruit Avenue (west), Marioa Avenue (east) out to Blackstone, and down to Kings Canyon/Highway 180 (south). Zoning is primarily residential with some commercial along the major arterials (Blackstone, Olive, Van Ness, Belmont).



EXISTING CONDITIONS AND RECENT INVESTMENT

- **Community events** are popular in the Tower District including Thursday Farmer's Markets, Rainbow Pride Parade/Festival, and a Street Vendor Program.
- **Façade Improvement Program** of \$1 million was established for Council Districts 1 (Tower District) and 4 (Airport Area) for underserved and minority small businesses. This program supplements a current \$100,000 façade program available to businesses in the Tower District and Kings Canyon/Ventura Corridor.

ASSETS AND OPPORTUNITIES

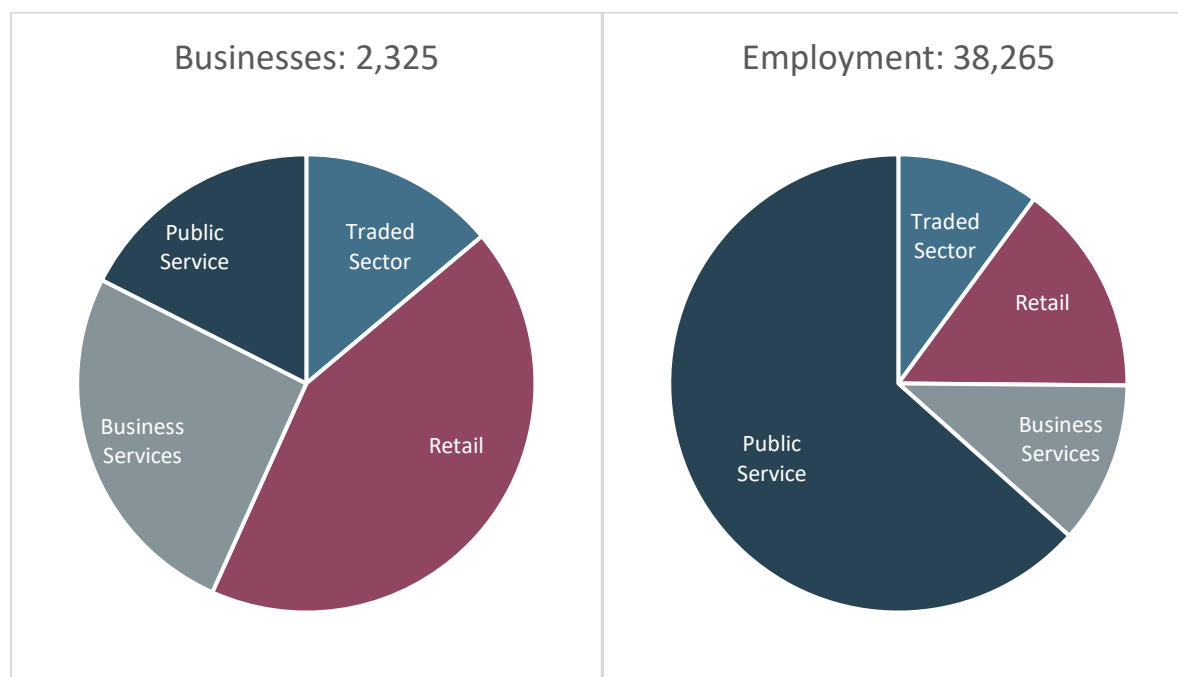
- Potential for additional community events that would generate traffic for local businesses.
- Fill vacancies.
- Site and buildings for new development and revitalization.

CHALLENGES

- Securing funding for improvements, revitalization, and pedestrian amenities.

Downtown/Chinatown

Downtown Fresno is a major employment and entertainment center. The area spans from W. Clinton Avenue (north) to Marks Avenue (west) to West Olive (south) and over to Weber Avenue (east). The first High Speed Rail (HSR) station (Fresno Station) will be in the heart of downtown Fresno and Chinatown between H and G Streets and Fresno and Tulare Streets.



EXISTING CONDITIONS AND RECENT INVESTMENT

- The City received a total of \$250 million for downtown infrastructure from a variety of state and federal funding sources. Additionally, \$6.2 million is already budgeted by the public works and public utilities departments for downtown infrastructure improvements. This investment is expected to catalyze private investment in residential and mixed-use development, thereby delivering high-density and walkable neighborhoods with equitable housing options.
- Chukchansi Park is the City-owned home of the Fresno Grizzlies, the single-A affiliate of the Colorado Rockies. Stadium capacity is approximately 10,500. A 2019 stadium renovation provides new fan amenities and social spaces.
- Several student programs were able to expand in Downtown when the Fresno Unified School District acquired space in downtown Fresno (Fresno and Fulton Streets). Among the programs housed in the newly renovated building is the Gifted and Talented Education (GATE) program and the Prevention and Intervention Department.
- Free trolleys to connect Downtown and the Tower District to Fresno City College and Fresno State campuses are planned which will make the businesses and entertainment hubs in these areas more accessible to students, and ease potential traffic and parking challenges.

- Fulton Street (formerly Fulton Pedestrian Mall) reopened to traffic in 2017. The City's \$20 million investment is beginning to see a revival of this section of downtown.
- Brewery District in the Fulton Street area has grown into a popular destination after the first brewery (Tioga-Sequoia Brewing Company) was established here in 2014. Private investment in tenant improvements and transforming warehouses into retail and restaurant space has spurred additional entertainment and dining establishments that attract city-wide residents and visitors.
- Façade Grant Program funded by \$1.5 million from American Rescue Plan Act (ARPA) and managed by the Fresno Area Hispanic Foundation was dedicated to repairing and modernizing building facades throughout the City of Fresno, specifically prioritizing minority-owned businesses and businesses in prioritized areas of the Tower District, Chinatown, Downtown, Bus Rapid Transit and Transit Oriented Development areas around Blackstone and Kings Canyon, and areas around the Fresno Yosemite International Airport.
- Special Events attract both residents and visitors into Downtown for: Fulton Street Party, Art Hop, Vamos! Food Truck Event ("Taco Truck Throwdown"), Fres-Yes Fest, Market on Kern (farmer's market), Oktoberfest, Tequila Fest, various parades, Convention Center concerts and events.

ASSETS AND OPPORTUNITIES

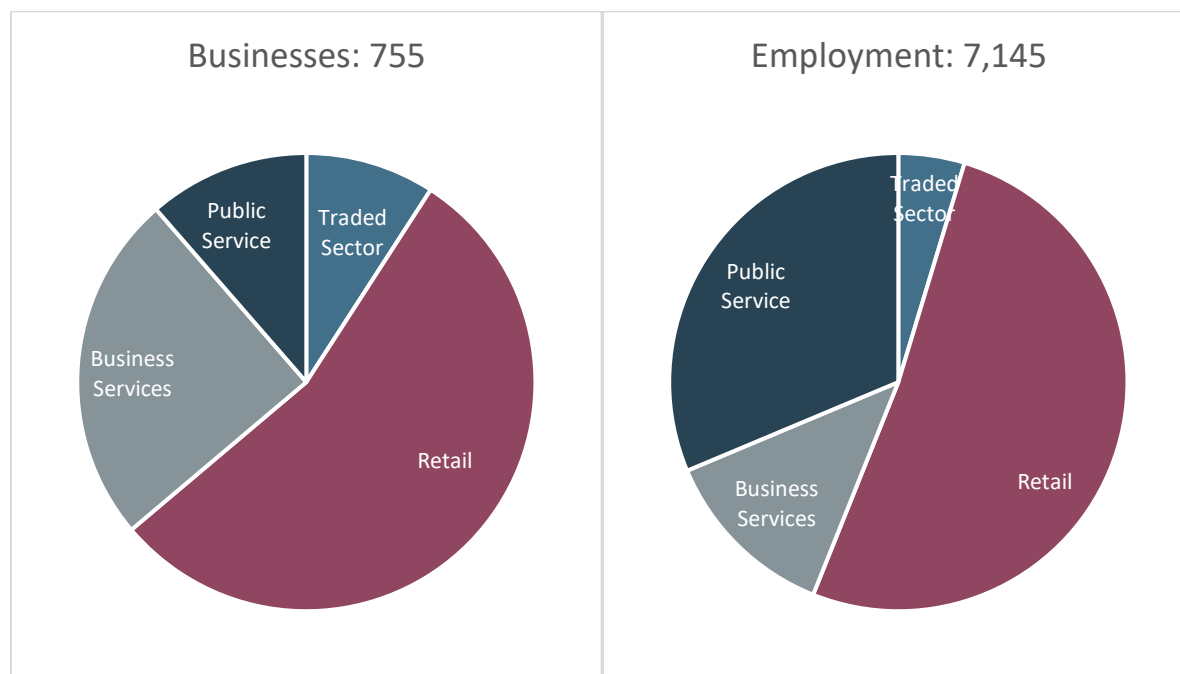
- The first High Speed Rail (HSR) station serves as a catalyst project that will further revitalize downtown Fresno and the Downtown/Chinatown economic center with new retail, restaurants, and offices. Riders will have easy access to Chukchansi Park, Fresno City Hall, County and Federal courthouses, and the Fresno Area Express (FAX) Bus Rapid Transit service. Fresno State University is about six miles north of the station and is easily accessed using FAX.
- Along Kings Canyon Road is about 600 acres of rail-served heavy industrial property.
- Three vacant/available buildings that once housed Bitwise Industries provide an opportunity for office, educational, and similar uses.
- Demand is strong for downtown housing. The City has a six-month waiting list of people who are interested in living downtown.
- A former 153,000-square foot JC Penney building is slated for reuse to apartments and ground floor retail by 2026.
- There is potential for additional community events that would generate traffic for local businesses.

CHALLENGES

- Securing funding for improvements, revitalization, pedestrian amenities, tenant improvements, and residential development.

Kings Canyon/Ventura Corridor

Bounded by Tulare Street (north), Butler Avenue (south), Yosemite Freeway (west), and Los Arbolitos (east). Primary land uses in this 2,893-acre Center are a mix of commercial, residential (single and multi-family) and several public facilities. Amenities include rapid transit running every ten minutes connecting Clovis Avenue to downtown and Blackstone. Rezoning of this Center in 2015 permitted more mixed use and multi-family development.



EXISTING CONDITIONS AND RECENT INVESTMENT

- Fancher Creek Town Center is a +/-200 acre planned development that includes housing, retail, entertainment, commercial and light industrial uses in a live-work environment.
- Ground was broken on Sarah's Court in 2023. This is a 120-unit affordable housing complex on Salma Avenue in the Fancher Creek Town Center. The \$33 million project is supported by a \$6.2 million loan from the City of Fresno, state housing tax credits. Construction is expected to be completed in 2025.
- Brandhaven Senior Living is also located in Fancher Creek Town Center, opened March 2023. The 180-unit facility offers affordable apartments for those aged 62 and over. Additional housing units will be built over time.

ASSETS AND OPPORTUNITIES

- The Kings Canyon Corridor Transit Oriented Development (KCCTOD) covers 4.5 square miles bounded by East Tulare Avenue (north), East Butler Avenue (south), South Argyle Avenue (east), and the 41 or Yosemite Freeway (west). The City is working to identify the best locations for housing, retail, offices, and public space development centered around the Q-line bus stations on

the Kings Canyon / Ventura Corridor. This work will also include development of up to three station area templates that can be used on properties along transit corridors citywide.

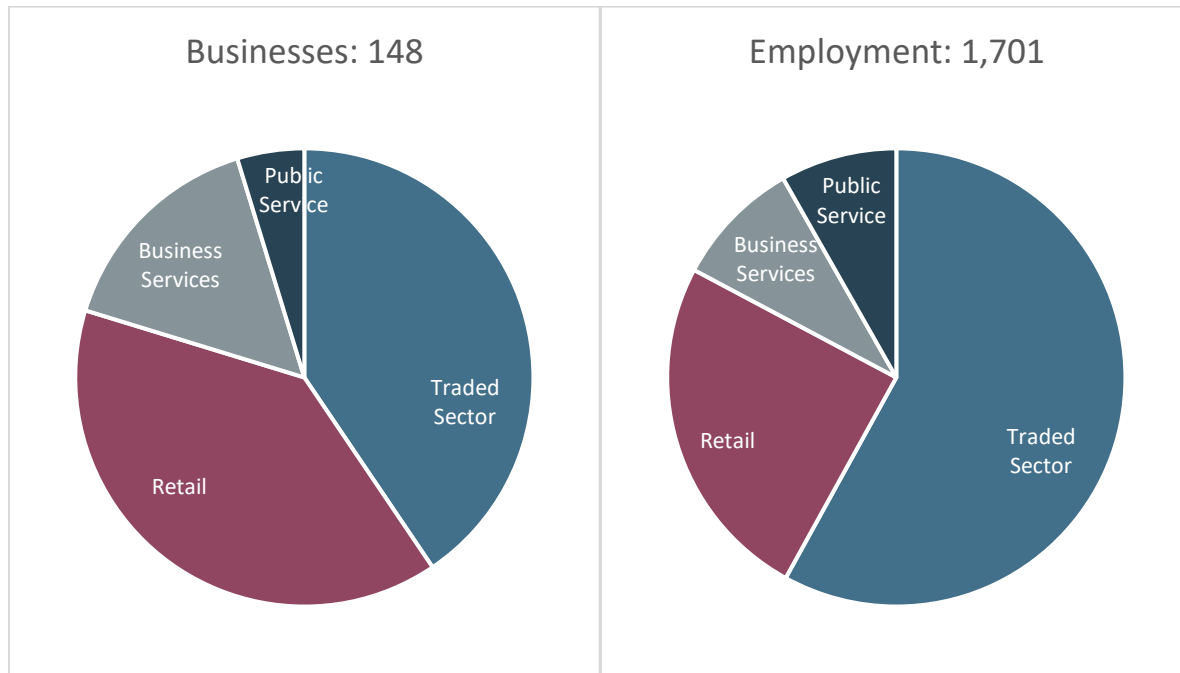
- The former University Medical Center (UMC) building located at Kings Canyon and Cedar Avenue is on the market for \$6 million. City officials and residents have identified affordable housing as the best reuse. The building has been vacant since the hospital closed in 2007.
- The former IRS Building located at Butler and Peach was closed in 2021 as part of the Internal Revenue Service's consolidation of processing centers across the US. Employees affected by the closing of the Fresno facility received job search and skills training assistance from the Fresno Regional Workforce Development Board's Rapid Response Team. The 531,976-square foot facility consists of five buildings on 48.46 acres and includes offices and warehouse space, loading docks, a fully equipped commercial kitchen and 2,641 parking stalls. The facility has easy access to four major highways and the Fresno Yosemite International Airport.

CHALLENGES

- Securing funding for improvements, revitalization, pedestrian amenities, tenant improvements, residential and mixed-use development.

South Van Ness Industrial Area

One of the oldest industrial areas in Fresno, this 416-acre area suffers from badly degraded streets, inadequate street lighting, lack of landscaping/buffers and under-utilized parcels. This Center spans from Butler/Ventura (north) to East Church Avenue (south), and west to Downtown. The Center is home to employers that serve the agriculture, food, and packaging industries.



EXISTING CONDITIONS AND RECENT INVESTMENT

- In 2016 the City of Fresno received a \$3.04 million grant from EDA for infrastructure improvements in the South Van Ness Industrial Area. The federal grant was matched with City funding of \$1.3 million for a total investment of \$4.35 million. The grant included funding for improvements to roadways, sidewalks, and intersections on East, Pearl, California, and Hamilton Avenues.
- OK Produce is a long-established (1950) family-owned produce wholesaler located in the Center. This local employer serves supermarkets across California and southern Oregon and is currently undergoing expansion and implementing Phase I of electrifying their fleet. The facility currently has 12,000 solar panels installed on the rooftop and parking lot that produces 6.5 to 7 million KWH.

ASSETS AND OPPORTUNITIES

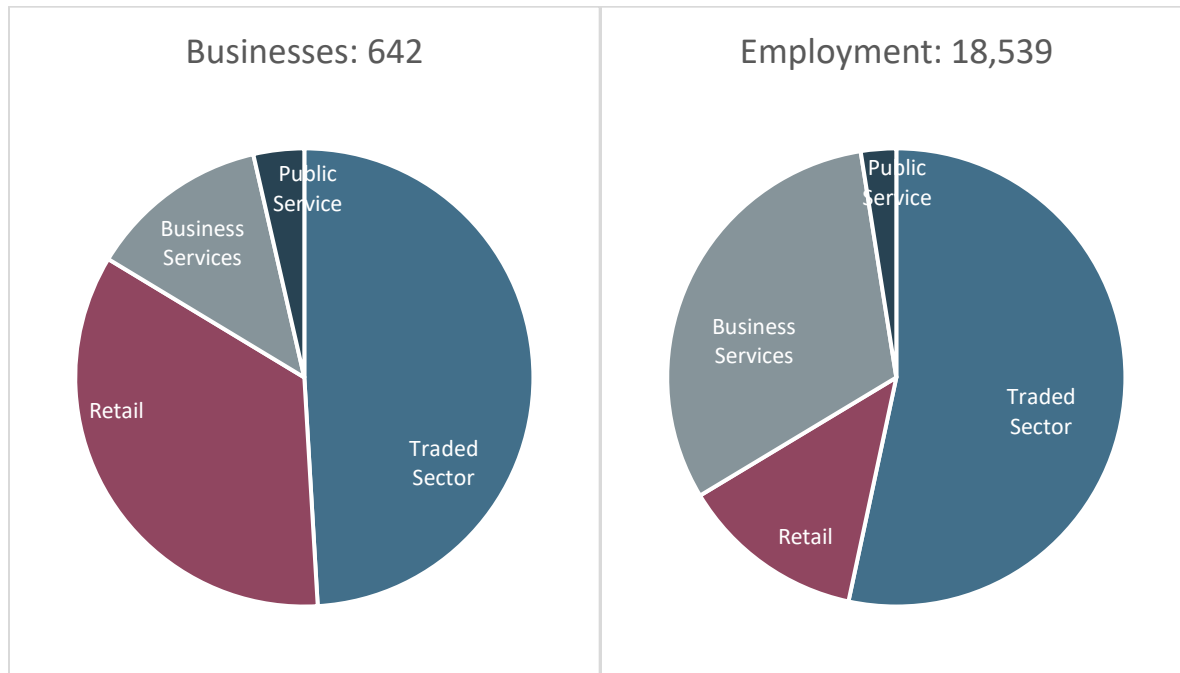
- Good highway access.
- Rail served sites are available within the Center.
- Several vacant sites suitable for industrial operations.
- The Center is underperforming relative to its potential

CHALLENGES

- A significant amount of work and investment is needed to improve aging infrastructure and make sites more marketable and attractive to new employers and to retain existing employers that may be expanding.
- Funding for missing public infrastructure, badly degraded streets, deferred street maintenance, lighting, paving, landscaping, and streetscapes.
- Code enforcement to clean up site and outdoor storage areas.
- Several short, narrow streets traverse the Center, a re-design would make the Center more attractive to new and current employers and workers.

South Central Specific Plan (SCSP) Area

This substantial area (5,562 acres) is the main industrial area in the City of Fresno which, according to a 2023 study completed by Invest Fresno, generates \$13 billion in economic output. The Center's northern boundary is South Van Ness, south to E. Center and American Avenues, west to Yosemite Freeway and east to Highway 99.



EXISTING CONDITIONS AND RECENT INVESTMENT

- Amazon FAT 1 Fulfillment Center is a 1 million+ square foot facility located on 64 acres in the South Central Specific Plan Area (SCSP), south of the Fresno Yosemite International Airport. The Center employs approximately 5,000 full- and part-time employees. Another 470,000 square foot facility (QXY8) supports the fulfillment center with overflow storage. This facility employs approximately 165 full- and part-time workers.
- Ulta Fulfillment Center is located just one mile southwest of Amazon facilities. This is the company's western e-commerce fulfillment center, and its first in California. The 670,000 square foot facility opened in Fresno in 2018 and employs about 500 workers.
- Coca Cola Distribution, in 2023, initiated an expansion to a 206,800 square foot facility on 14.78 acres in the SCSP area, about two miles west of its current 65,000 square foot facility in Fresno. The distribution center employs approximately 200 workers.
- Other employers located in this Center include Valley Wide Beverage, Scelzi, Keiser Corporation, Caro Nut, JD Food, and Betts Company.
- Approved in December 2023 are plans to improve North Avenue freeway intersection in the middle of the Center over the next two years; includes upgrades to 60-year old interchange to relieve

Highway 99 traffic congestion. Improvements are funded by state, transportation, development fees, and Measure C.

ASSETS AND OPPORTUNITIES

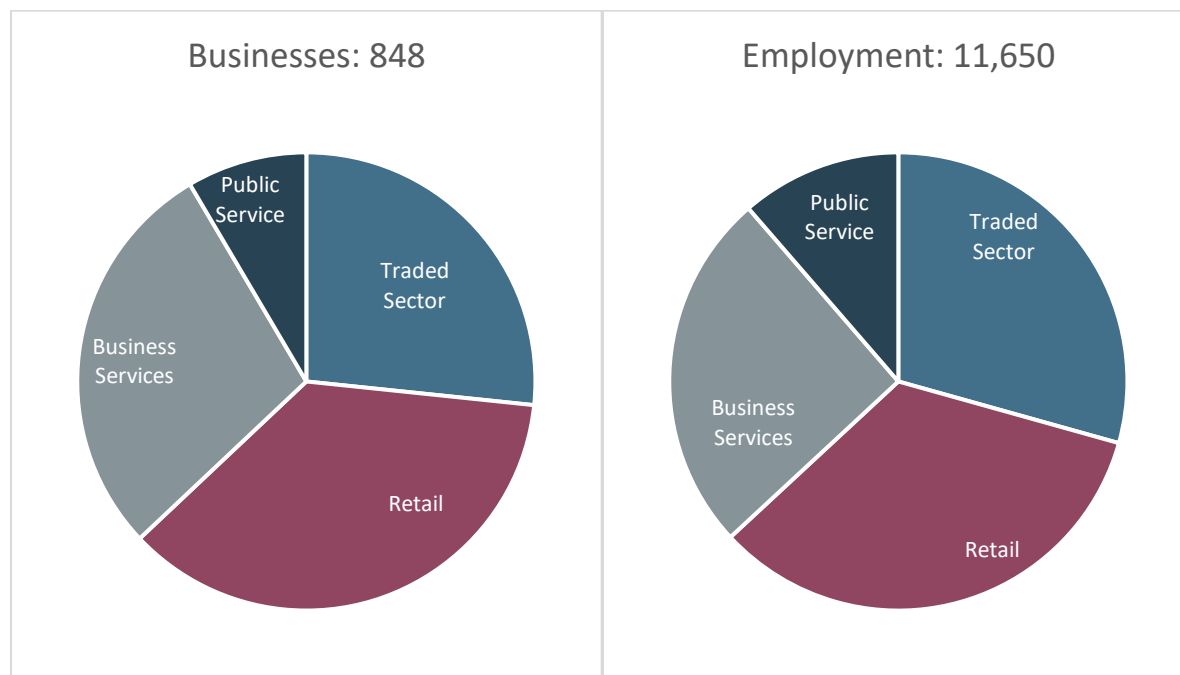
- BNSF Rail serves sites along Highway 99 and further east to Peach Avenue.
- Vacant sites with infrastructure in place.

CHALLENGES

- Litigation initiated by adjacent Fresno County residents and existing/expanding/new industrial operations in the Center have increased over the past several years. Environmental Justice litigation adds to the cost, time, and ease of development.
- ,
- Lead time of 18 to 24 months to bring PG&E infrastructure into a specific site and confirm capacity.

Fresno Yosemite International Airport Area

The airport area is a 2,259-acre Economic Center important to the entire region for commercial and industrial trade as well as for the tourism industry. The Airport Center is bounded by Dakota Avenue (north), McKinley Avenue (south), Argyle (east), and Chestnut and Winery Avenues (west). Besides airport use, zoning is primarily light industrial.



EXISTING CONDITIONS AND RECENT INVESTMENT

- Palm Lakes Business Park is located on the northeast corner of Dakota and Willows Avenues, just four miles north of the Fresno Yosemite International Airport; tenants include Speed Engineering, Universal Coatings, and others.
- The Fresno City Council recently approved a \$1 million Façade Improvement Program for Council Districts 1 (Tower) and 4 which includes the Airport Area. The program is aimed at underserved and minority small businesses.
- The GAP Pacific Distribution Center is located east of the airport along Dakota Avenue. The development includes two buildings and a solar field.
- East of the airport is the long-established and popular Airways Golf Club.

ASSETS AND OPPORTUNITIES

- Several hundred acres east and north of the airport are zoned for light industrial development including an 11-acre parcel in the Palm Lakes Business Park.
- No known constraints to further development.
- Outside the City limits and east of the airport is land zoned for light industrial development.

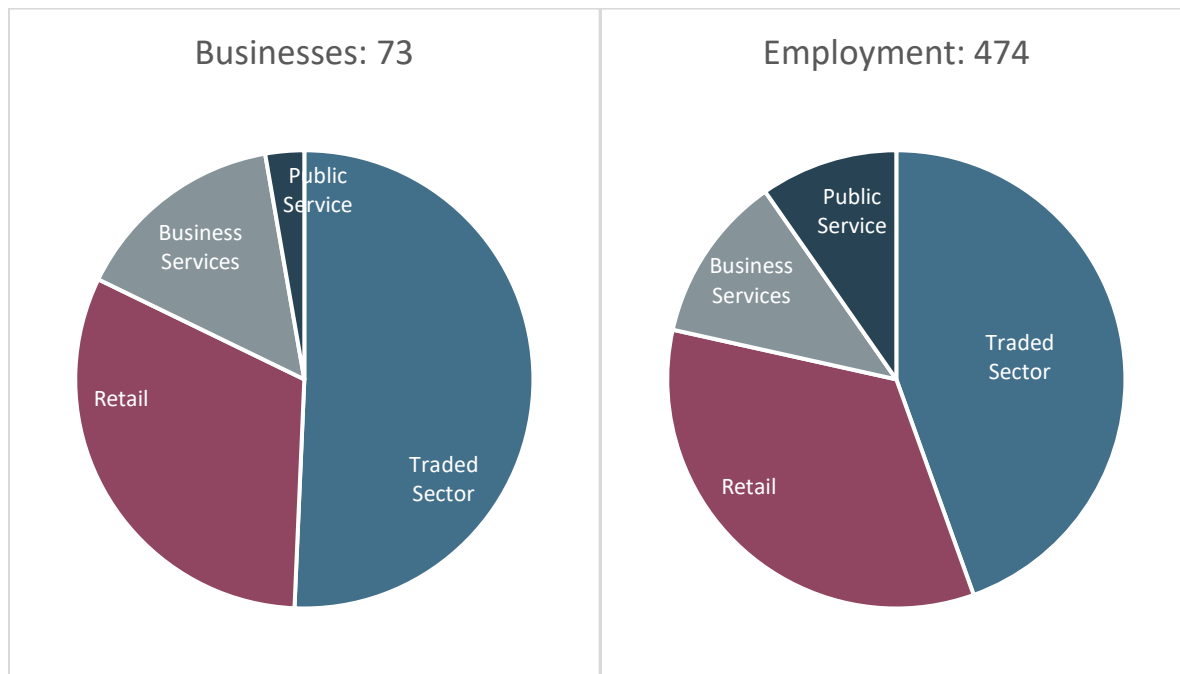
- There is interest in designating space in and around the airport for commercial transportation of agriculture products, manufacturing and supporting industries.

CHALLENGES

- Securing funding to make available parcels market-ready e.g., install or upgrade infrastructure, streets, lighting, paving, landscaping, and streetscapes.

Southeast Development Area (SEDA)

Bounded by Minnewawa, Temperance and Locan Avenues (west), McCall, Highland and Temperance Avenues (east), the Gould Canal (north), and North and Jensen Avenues (south), this 8,621-acre planned development area is located in the southeast area of Fresno's Sphere of Influence. Currently home to an estimated 73 businesses, the Fresno General Plan includes this as one of the City's primary growth areas for 2035 to 2050. SEDA aligns with the General Plan's policy of balancing growth with infill development, includes diverse residential districts, employment districts, open space, agricultural uses, and green infrastructure.



ASSETS AND OPPORTUNITIES

- Future development will provide for increased housing density, adding 45,000 diverse housing units for all income levels which will accommodate 130,000 residents at buildout (a 23% increase in population). Phase I calls for 15,000 housing units to be built beginning in 2035.
- The area is currently rural/agricultural land. To accommodate the population growth forecasted for Fresno while protecting productive farmland, the SEDA specific plan: 1) proposes to cluster homes and jobs at more than twice the density of current development; 2) adheres to the Fresno County Right-to-Farm Ordinance which requires new subdivisions within 300 feet of an agricultural zone to record a covenant which requires residents of the subdivision to accept the inconveniences and discomfort associated with normal farm activities; 3) calls for the establishment of a Farmland Preservation Program to help mitigate the loss of agricultural land and support for the viability of small farming; and 4) creates spaces for agricultural training programs, farmers' markets, community gardens, agricultural education, small farms, entrepreneurship, agricultural research and innovation.

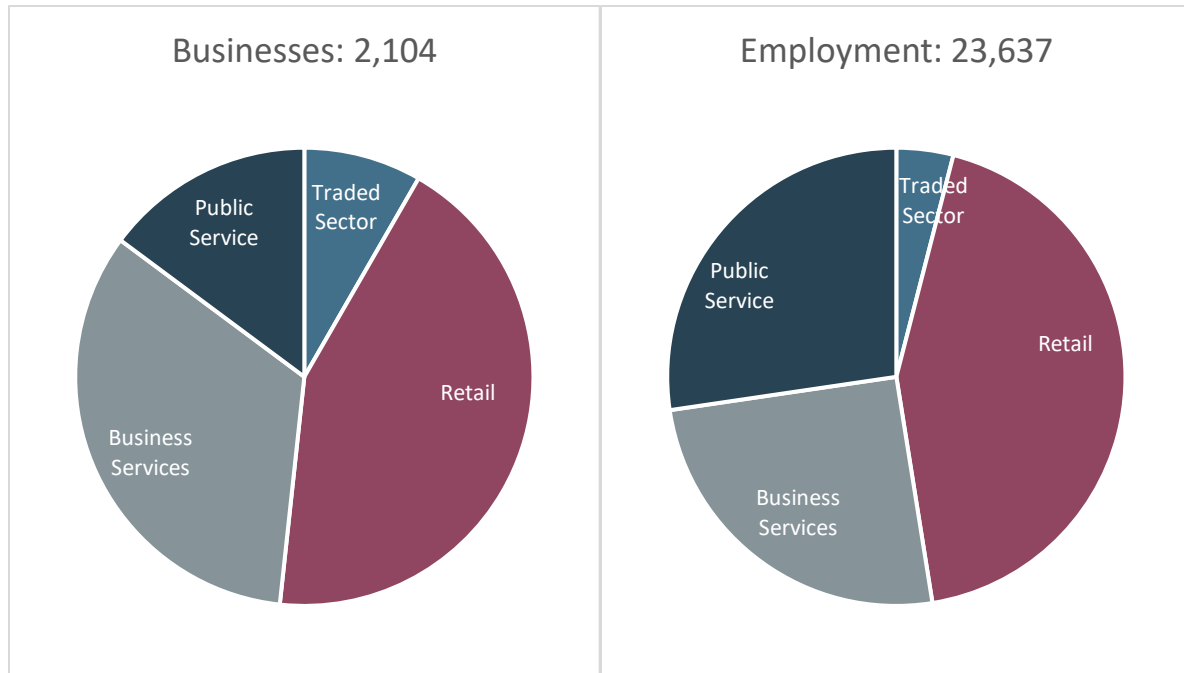
- The City of Fresno adopted its Greenhouse Gas Reduction Plan (GHG Plan) in 2014 and updated it in 2021 to comply with new targets set by the State of California and align with California's 2017 Climate Change Scoping Plan. The SEDA specific plan includes high-density and mixed use development to provide more housing while reducing travel; focus on pedestrian-oriented amenities, walkable neighborhoods with schools, shops and parks; transit-oriented development; and energy conserving development.
- Development in the SEDA is expected to realize up to 37,000 jobs in mixed-use and flex spaces and ultimately become a significant economic center. The goals of the SEDA are to acknowledge and build on Fresno's current strengths to create economic opportunity in an environmentally responsible way and attract investment from industries that are a best fit for Fresno (agriculture technologies, advanced manufacturing, clean energy, construction, food processing, healthcare, information processing and software development, logistics and distribution, and tourism).

CHALLENGES

- The City is currently experiencing resistance from county residents who do not want to be annexed into the City and are opposed to the development of agriculture land.
- Funding for infrastructure to support development.

Shaw Avenue

A strong commercial and retail area that is home to over 23,000 businesses, Shaw Avenue includes commercial areas along the north and south sides of Shaw Avenue from Highway 99 (west), crosses Blackstone and runs east to Sierra Freeway.



EXISTING CONDITIONS AND RECENT INVESTMENT

- Employers and development in and around the Shaw Avenue area include Fresno State University, Fig Garden Village Shopping Center, Fashion Fair Mall, West Acre Shopping Center, Arbor Faire Shopping Center, Walmart Supercenter, and dozens of other retail chains and independent small businesses.

ASSETS AND OPPORTUNITIES

- A walkable area.
- Further commercial development including the reuse of the Costco facility that is planning an expansion and move to Herndon Avenue Center.

CHALLENGES

- Funding for infrastructure upgrades, pedestrian amenities, streetscaping, etc.

APPENDIX E: Reference Documents

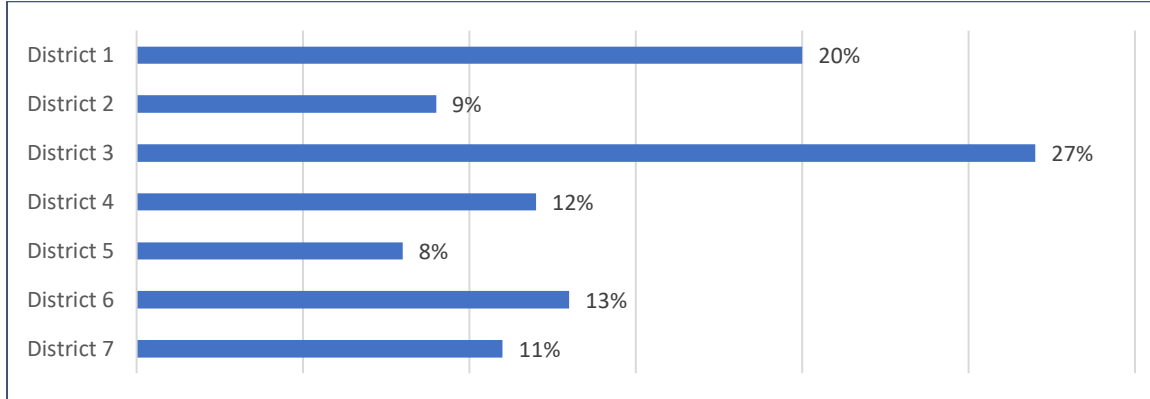
The city of Fresno has and continues to invest in city and neighborhood planning. Below is an inventory of the planning efforts undertaken by the city since 2000 that were considered during the creation of the City of Fresno Comprehensive Economic Development Strategy.

TITLE	YEAR
City of Fresno Fiscal Year 2024 Budget	2024
Fresno Economic Opportunities Commission Strategic Plan	2023-2026
Fresno Regional Workforce Development Board, Biennial Modification to the Program Year 2021-2024 Local Plan	2023
Good Jobs 4 the Central Valley (Good Jobs Challenge)	2022
Fresno Small Business Capital Flows & Gap Analysis	2022
Fresno West Area Specific Plan	2022
Regional Workforce Development Board 2023 Biennial Modification to Local Plan	2021-2024
Central Southeast Area Specific Plan	2021
City of Fresno Strategic Technology Master Plan	2021
Greater Fresno Region Drive	2019-2020
Fresno County Multi-Jurisdictional Hazard Mitigation Plan	2019
Sewer System Management Plan; City of Fresno Wastewater Management Division	2019
Transform Fresno: Displacement Avoidance Plan	2019
Southern Blackstone Avenue Smart Mobility Plan	2019
Southwest Fresno Specific Plan	2017
Fulton Corridor Specific Plan	2016
Downtown Neighborhoods Community Plan	2016
Fresno Parks Vision 2050	2016
City of Fresno General Plan Housing Element	2015-2023

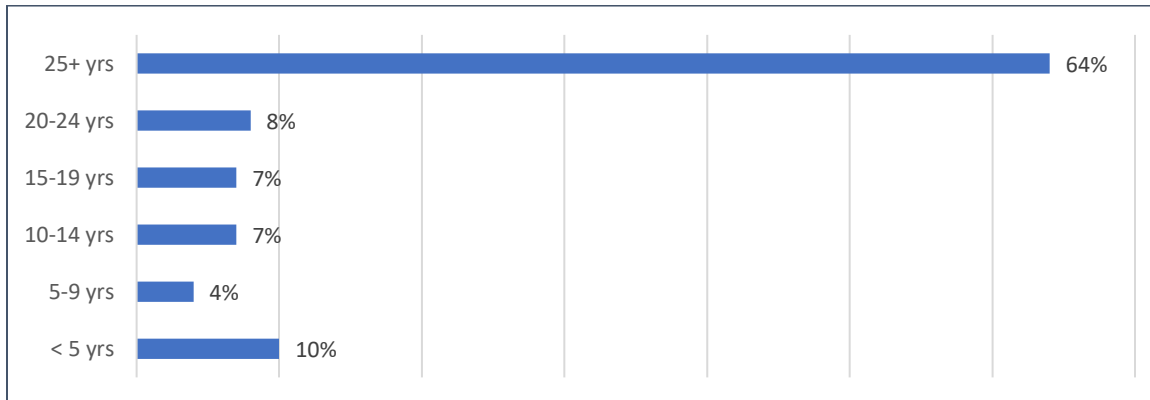
TITLE	YEAR
Fresno County EDC Comprehensive Economic Development Strategy	2015
Economic Development and Fiscal Responsibility Plan	2015
Highway 41 & North Corridor Streets Plan	2015
City of Fresno General Plan and related updates	2014
Old Fig Garden Transportation Study	2013
El Dorado Park Neighborhood Plan	2009
Pinedale Neighborhood Plan	2007
Tower District Specific Plan Design Guidelines	2004

APPENDIX F: Public Survey Results

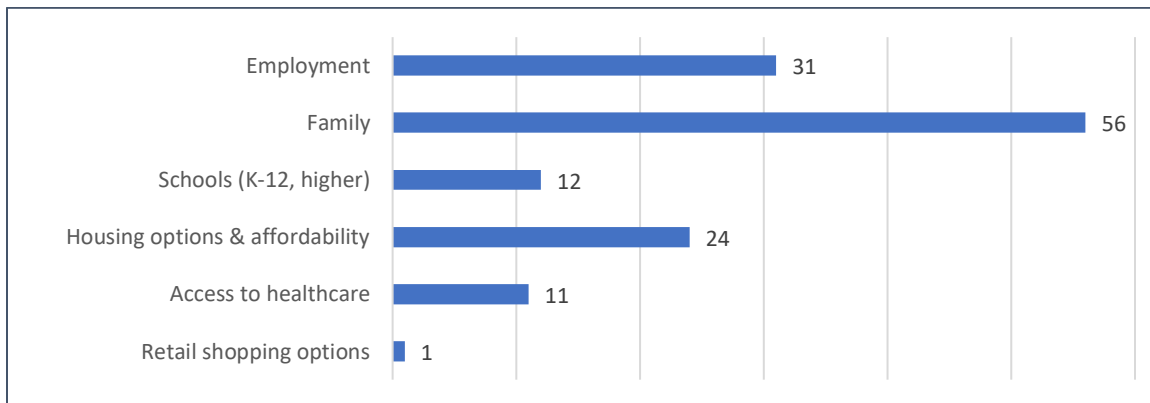
1. In which City Council District do you live?



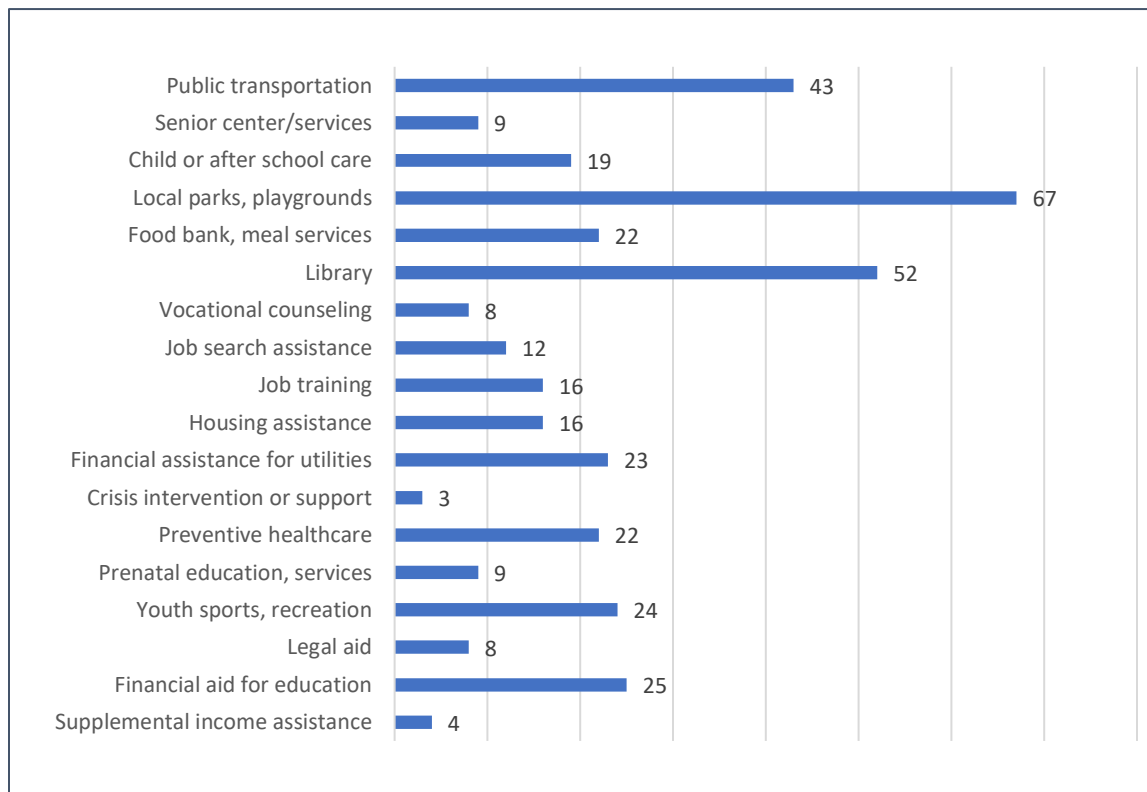
2. How long have you lived in Fresno?



3. What are the primary reasons that caused you to choose (or to stay) in Fresno?



4. What community services have you used?

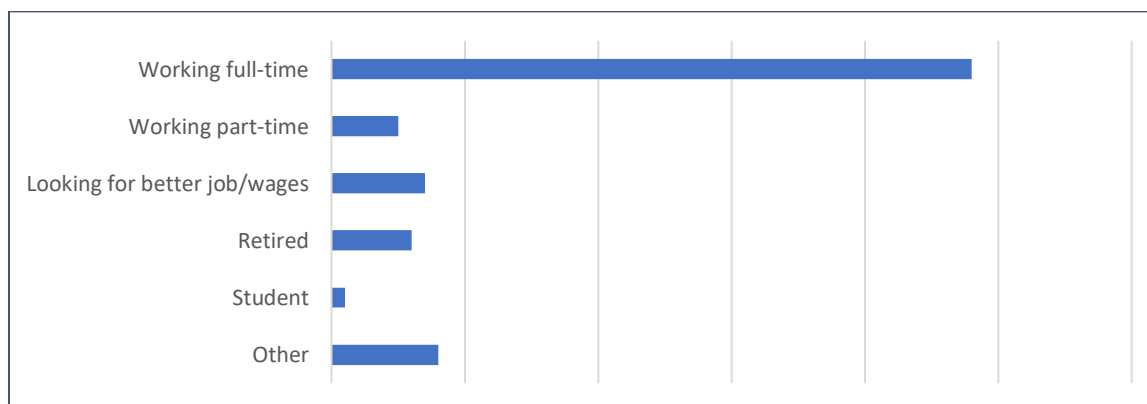


5. What community services do you want more of or are lacking in your neighborhood?

- Senior center in Fresno. More mental health and drug services to assist getting homeless houses. Transitional programs. Less welfare and more services.
- Think you should provide a couple of examples of community services
- Youth sport or community center closer to Chandler park.
- Housing Assistance
- Parks with recreation center
- Tower library and get rid of the bicycle lanes
- Job training
- A neighborhood park that has a play structure for kids.
- A library for Tower District
- Safe connected bike network, non profit cafe that supports job training, additional pocket park space
- Crime, Homelessness reduced. Speed reduced for everyone not just steer racers.
- Parks/dog parks, public trash cans
- Mobile showers and outreach for unhoused
- Getting homeless out of residential areas
- Better roads and more street lights
- New roads.
- youth and young adult focused
- Fight crime, decrease gangs, clean streets, fix potholes
- Community/neighborhood watch
- Mental health support for homeless
- housing for lower low low income also not enough information knowledge people don't know how things will effect you when you're older also middle aged job programs that speak Spanish
- More diligence on pot holes
- better services for the unhoused

- Improved Park conditions
- I live closest to District 2 in unincorporated area. Bike lanes in unincorporated areas (Bullard/Fig)
- Restaurants
- All of them
- Grocery Stores
- more recreation programs
- Cleanup-Alleys, Community Safety & Crime Prevention; Community cleanliness and improvement
- Cheap housing, drug counseling, youth programs, assistance to individuals fighting mental health
- Childcare and youth sports
- None for MY neighborhood, but I am lucky in that I can afford to live in this area
- Light Rail System
- Quality Public landscape maintenance
- Roads repaired
- Not sure.
- Parks
- Library access and accessibility.
- Youth sports, parks, legal and political support, prenatal services, preventative healthcare, comprehensive healthcare
- I would like more services in financial assistance for food.
- access to services in 93706
- Preventive Care Clinics
- Parks and trails
- Positive recreational and training programs
- Medical and brick and mortar
- Homeless help and community clean up, drug counseling and prevention
- Street cleaning
- Better parks in our area. More services for teens.
- More sports programs for the youth.
- Jobs - Full Time, Senior Housing & Educational Programs
- Affordable Childcare, Better Jobs (livable wages)
- Walking trails, more housing (not apts), stores or malls.
- Parenting services/childcare
- More enjoyment
- Access to quality preventative health care.
- More LGBTQ+ services. I have to go to Visalia to get bi+ competent sexual health screening
- Affordable housing
- Affordable housing, emphasis on affordable
- Parks and common areas for events
- Convenience stores, parks and food stands
- Intermediary opportunities for businesses that do not have enough to rent premises but want to continue growing. A shared location for street vendors would be ideal
- We need more parks and safe schools and specialized doctors

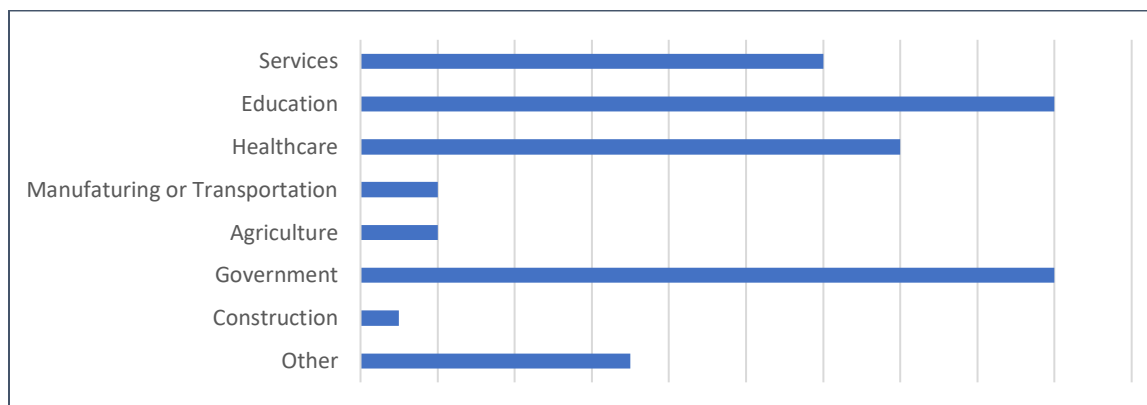
6. Which statement(s) best describes your current employment situation?



Other:

- Business owner Nearing retirement
- Childcarer
- Entrepreneur
- I work full time, and also run multiple business regarding housing for individuals facing homelessness and the elderly community
- I'm needing education so it's hard to find work
- Self employed and working as much as I want to at 73
- Self employed and working as much as I want to at 73
- Unemployed

7. In what business or industry are you employed?



Other:

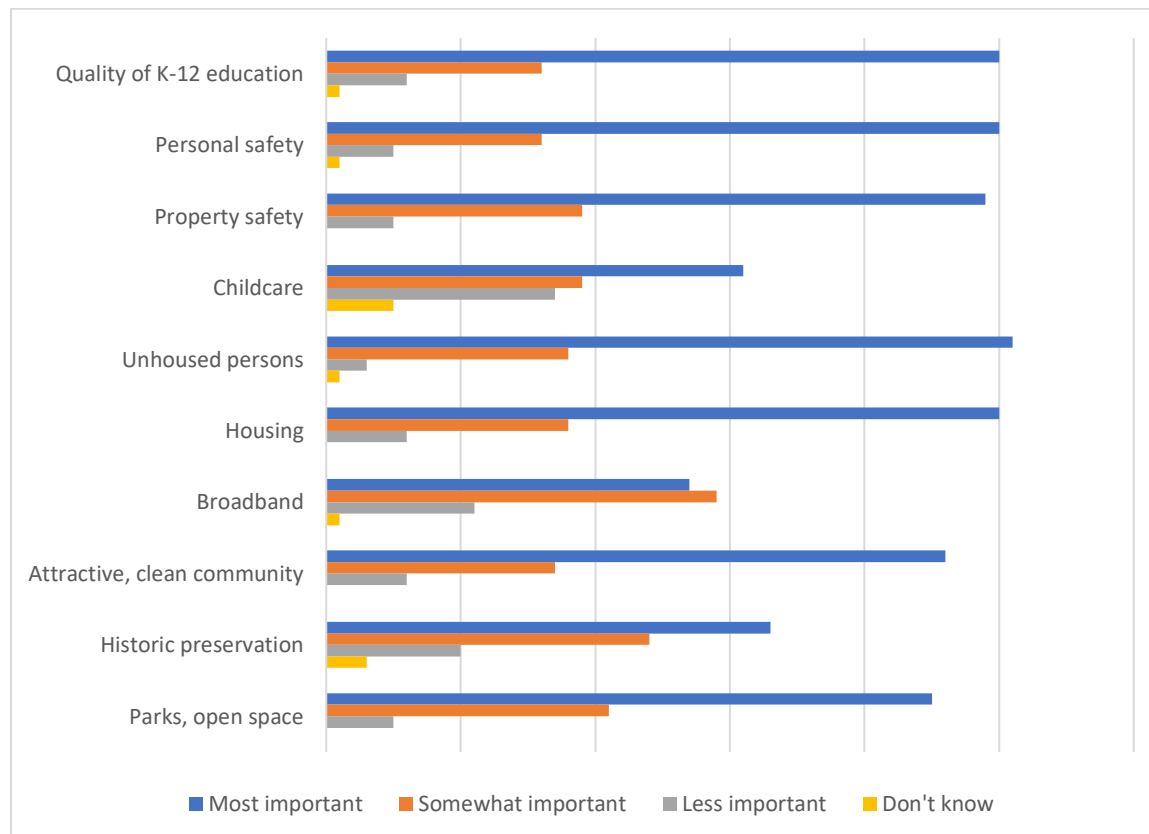
- Arts and Culture
- Community Leader with Another Level Training
- Janitorial
- Non-Profit
- Philanthropy
- Printing
- Student

8. What is your occupation or job title?

- | | |
|--------------------------------------------------|-------------------------------|
| ▪ RN Care mgr and consultant | ▪ Retired Educator |
| ▪ Manager | ▪ Teacher |
| ▪ Consultant | ▪ Rerail |
| ▪ Appeals analysts | ▪ Client Services Executive |
| ▪ Dental Assistant | ▪ Development Program Manager |
| ▪ Program administrator | ▪ Human Resources Technician |
| ▪ Associate Environmental/Transportation Planner | ▪ Administrative assistant |
| ▪ Quality assurance management | ▪ Human Resources |
| ▪ Information Technology Technician | ▪ Buyer |
| ▪ Data Analyst | ▪ house keeping |
| ▪ Insurance broker financial services | ▪ I am a business owner |
| | ▪ Program Coordinator |

- Project Manager
- Research Analyst
- Educator
- Social Worker
- Retired Teacher
- CEO, Business Development, financial officer, operator, caregiver
- Deputy
- Executive Director
- Business Intelligence Analyst
- Planner
- Retired
- Landscape Associate-Caltrans
- Executive Director
- Information Technology Consultant
- Mail Clerk
- Community Engagement Coordinator
- Management
- intern
- Business Development
- Director of Care
- Director
- None
- Mentor
- Care provider
- Facilitator
- Customer service clerk
- General Manager/ Division Manager
- Supervisor
- Final Assembler
- Health Care IHSS
- Resident Engagement Specialist
- Accountant - Care Provider
- Tax Examiner (Small business)
- Student
- Master Barber
- Program director
- City of Fresno Youth Job Corps Ambassador
- Cleaner
- Officer
- Professor

9. What are the most important issues/concerns you have that the City of Fresno has the ability to address?



10. My favorite thing about living in Fresno is...

- Community
- Diversity of activities, zoo, my neighbors
- People
- The weather
- Central location in the state. The zoo & art hop
- The live and let live attitude. I left Santa Barbara and the oppression there. I love that I bought a house while making \$12/hr and never get harassed by PD for being Hispanic. Fresno means freedom
- Carne Asada tacos and Mexican orange fanta
- Family
- Being close to family and having access to shopping near where I live
- My home in the Tower District
- The people
- Its my home.
- The local community and supporting small businesses
- Centrally located in CA, quick drive to anywhere wonderful!
- Job and affordable living
- Nothing really . There isn't much to do
- Low cost of living. Ease of access to retail, shipping, grocery, and restaurants. Quality of entertainment options and sports. Great university. Big city amenities without the headaches of a San Francisco or LA.
- Different selection of activities and entertainment
- The people and location
- Relatively affordable for California, central location in the state, diversity in people and food.
- Small town feel
- My family. That's it. I hate it here.
- I never been anywhere else comfortable
- My job
- The Community in Tower, its so centrally located-ocean, mountains etc
- Fresh produce, centrally located between mountains, beach, SF and Southern Cal.
- Recreational opportunities and community connection, cultural arts
- Traffic is not so crazy compared to bigger cities (in my area of Fresno).
- distance from southern and northern California
- The mix of different cultures that create a truly unique community
- the family resources
- my family's roots are here.
- Fresno is a peaceful, more like a retirement city. Fresno is a great city and when you give it a general overview of the livelihood and services provided you don't need to look any further for your next permanent home
- The sense of community and being able to get out of "town" quickly
- Distance to major hubs, mountains, beaches.
- The historic neighborhoods and retail amenities
- No favorites
- Family history, abundance of produce, proximity to mountains, beaches, other destinations.
- The spring and fall
- Opportunity and growth, moderate costs of living
- The people.
- The diversity of the residents.
- Cost of living and family.
- the diversity of individuals living within this community
- The heart of the Community
- The opportunities
- Diversity in people and cultures
- Working with neighborhood watch
- Being around my family
- Vally
- Greenery/Housing/Education
- Close to family
- Personal, professional and family connections
- Being able to own a home
- My community, my family and my friends.
- Community Services & Concerns for Homeless
- Community Resources
- How diverse the community is.

- Accessibility
- Fresno is home for me
- The multi-cultural people in Fresno.
- Location in CA.
- The number of grassroots orgs and public library
- I love my city
- My community
- Easy to travel around
- People and medical insurance
- cost of living
- quiet place to live
- that the streets where I live are wide

11. My least-favorite thing about living in Fresno is...

- Homeless
- Crime and homelessness
- Homeless, crime, brunt of jokes. No major newspaper and it's cost
- The weather
- The homeless and prostitution by the zoo, garbage piles everywhere, on Kearney. There should be cameras to be able to fine the contractor dumping garbage on Kearney and Hughes.
- The bay area transplants calling the city, PD, authorities on neighbors for dumb things like trash cans being left out past 8pm
- Run down neighborhood
- Jerry Dyer and everything having to do with the "One Fresno" concept...it marketing and not action.
- The increase in homelessness in the recent years.
- The influence of businesses (esp. out of town owners) over residents in the decision making process (esp. in SW Fresno), which is also my biggest concern that can be changed.
- Homeless crime trash lack of pride from many for neighborhoods and people.
- Infrastructure needs
- Air quality is toxic! Lack of beautification of business locations. Tacky signs everywhere create visual pollution!
- Heat and air quality
- Too many abandoned building and trash everywhere.
- The politicians - Tyler Maxwell is the only likable politician in the city. They continue to serve their own self-interests rather than those of the citizens. I also dislike the lack of development in Downtown Fresno. I worked there for many years and love the area but am consistently frustrated by the lack of strategic planning and missteps concerning Downtown development. The convention center NEEDS to be updated to attract visitors and business and we need more hotels in the downtown area. Stop trying to get people to move down there. People won't live there if they can't do grocery or retail shopping within a 5-10 min drive. I also dislike the weeds along the freeways. Other cities have brush and other greenery that are nice to look at but ours are always over run with dead brush and weeds. It's terrible.
- How poorly we advertise ourselves, communities, and businesses
- The heat
- Endless hot days in summer. Sometimes terrible air quality. Drugs, crime, and gang issues, corrupt government and housing development
- Lack of diversity
- The lack of care and concern for the homeless. THEY ARE PEOPLE TOO!!!!
- Crime no job training services Spanish speaking
- How some areas of Fresno have been left behind
- How much people are afraid to go to Tower or Downtown. How Fresno has such a bad "reputation"
- Trash and gangs
- transportation issues
- The lack of night life socializing options.
- air quality, birth outcomes

- The lack of green space and the disproportionate level of investment/resources focused on North Fresno
- lack of resources
- the hot summers. Fresno is getting hotter each summer.
- Seeing the need for housing when there is sufficient housing . The Community needs to fight on bettering the individuals of the city, and not the city itself
- The amount of litter on the roadways and highways
- Air pollution and crime.
- Crime and the poor quality of landscape maintenance on private and public land.
- The City is not taking care of west side and the unhoused
- How run down and neglected the Historic parts of our city are.
- The bad air quality, closed minded hr policies for immigrants
- My representative
- The conservative politics.
- The lack of a cohesive community among diverse groups and the lack of local government making sure services are directed towards the diverse demographics.
- Lack of entertainment options
- the unhoused and the feeling of danger in southern Fresno
- More opportunity and incentives that help support middle class home buying
- The systematic disparities that affect black people
- Poverty
- Street needs to be repaired
- Gun violence / gangs
- Na
- Jobs wages are low
- Drugs, homeless issues, safety, lack of support from government and law enforcement for "small issues"
- How horrible our roads are. I have complained multiple times about the potholes in the cracks. And the lack of sidewalks, especially near Shaw Polk area. it's always really embarrassing when we have family come visit and the Shaw Polk intersection takes them 30 minutes to get to our home and the roads mess up their cars.
- The guns and violence and harmful chemicals put out into the world.
- Wages/Jobs
- Homeless is becoming more of an issue.
- Nothing to do (entertainment)
- The amount of violence. Homeless sleeping on highways, in front of stores, banks, etc.
- The crime
- The lack of fair economic and educational access between North Fresno and West Fresno.
- The recent anti LGBT legislation at the Board of supervisors level
- Not being able to find affordable housing and help with sustainable living and other social services
- Discrimination
- Urban sprawl
- Lack of public transportation, good, nice, cheap
- How the government tries to ask for our opinions. You never know if they really took your comments into account or not.
- that we need more parks and green areas
- gangs

12. What would you like your city council representative to know about your neighborhood, your concerns, your priorities?

- Crack down on street racing and homeless
- Needs code compliance too many drunks and drugs
- The garbage on Kearney, inflation is crazy. I'm working poor single mom, don't qualify for any assistance programs can not afford housing, live with my parents

and can still barely afford one trip to grocery store a month. My neighbor is disabled and brings me food from food give always during the week. A lot of the food are things we don't use. I have chronic back pain for past 8 years but currently work. I don't think I can continue if working prevents me from getting assistance for housing and real groceries. Inflation is horrible really affects working poor like me.

- Appreciate family, enjoy celebrating, dance, be grateful, stay humble. Don't call PD on happy people. People should only call on criminals.
- Her lack of concern for the organized residences will get her voted out of office.
- Potholes, crime, homeless
- That I appreciate the work they are doing to improve the cleanliness of the city and would encourage that work to continue.
- Crime, homelessness
- My priority is having everything I need in walking distance, places to exist without spending lots of money, affordable housing for everyone, curbing sprawl, phasing out industrial in residential neighborhoods, and those in power to understand how all of these are connected.
- Homeless removed speeding on all surface streets dealt from most drivers. Crime. Thank you for this survey.
- I signed up for project 2 review committee updates months ago so I could stay abreast of district 2 happenings, but I never got any feedback. How about sending a newsletter via email like the other districts? Maybe I missed the sign ups.
- Homeless issues and street racing
- Roads and street lights

- Please keep our parks clean, schools and neighborhoods safe.
- Provide sustainable solutions to our communities, not quick fixes, and include community input. I see an effort to try and make District 3 more accessible, but disregards the current residents and businesses making it less desirable for them and more vacancies to fill.
- Please seriously address issues with the unhoused and petty property crime. Get police officers out of their vehicles and on bike patrol to really get to know the citizens of the neighborhood.
- Safety
- Again. Help the homeless
- Where I stay at Motel Big Star
- I am happy with my neighborhood. Not happy how our rep behaves many times in his job function
- Well, I love my neighborhood.
- I love my neighborhood, but wish it was incorporated into the City; city services and attention would support our neighborhood.
- Our neighborhood has too many homes and little restaurants/food options.
- Black people are suffering in both districts
- homeless issues continue to be a concern, need to look at providing MH services to communities of color and marginalized communities, like homeless
- The side streets in my neighborhood and that of the next block need fixing. Residents who have alleys in their neighborhood should be educated on keeping the alley clean. A city- wide educational campaign would be beneficial (for those Districts affected).

- The city of Fresno is a well known city even in other states. This is where i will always call my permanent home.
- My concerns are with the individuals of the city and not the city itself. The city provides more then sufficient services and programs for the people it serves. Now its all of question , if the individuals want to receive the assistance . I, myself have many plans for the city of Fresno, and know that my plans and vision will bring an overall betterment to the city, by providing a wealthier, safer, attractive and free city, and the reduction in the number of homeless individuals in the city, and by providing thousands of more jobs for the city's individuals.
- nothing at this time
- Package theft has become a major issue at my residence I would also like to see more effort by PW staff on the establishment and maintenance of public landscape areas. Code enforcement needs to treat Fresgo requests seriously and stop signing them off as complete when they are not. They also need to be more available and accountable.
- A tree issue that they used a bandaid method instead of removing the tree. The street that leads to the school needs to be repaired. They barely fixed the pot holes.
- Preserve historical spaces and places, plant more trees, designate Armenian Town
- We need more walkable streets, more bike lanes and more opportunities for people to get around without car
- Focus on ways to make the lives of all constituents better regardless of personal beliefs, invest in resources and development that meets community needs
- If we treat libraries as just another place where you can get a book, and somewhere where, do you get to read this book or do you not get to read this book, as opposed to understanding that library is a central public resource where people go to get access to knowledge and resources, we are doing a disservice not only to libraries but ourselves.
- Libraries are among the last public spaces where people can simply be without having to purchase a good or service or spend any money at all & public goods are shared in common and distributed to everyone. They exist. They are right here, in our communities. And if we lose it, we will not get it back for a very, very long time.
- My neighborhood needs more trees, more parks, more green spaces, overall more and better appearance especially because there are schools and the children deserve to learn in clean and healthy environments. More crosswalk safety for the children too. More small groceries, more businesses. More mom and pop shops. The city needs to take inventory of their lots and convert them to quality housing of mixed use.
- Beautify. We need less homeless, more beautification and more entertainment options/restaurants/nightlife.
- I would like my city council representative know that in District 7, it doesn't feel safe to walk around outside or to just be outside in general, and I would like something to be done about that.
- We need more support for middle class to purchase homes in the city where they live.
- We need more safe space for dialogue that are progressive
- Need more affordable housing
- Come to the people in the district more often
- We need sidewalks

- Homelessness, Drug uses and crime
- There is a lot of activity at night on the streets.
- Crime rate is up, homelessness is worse, not a safe place for children to play outdoors anymore
- Dollar Tree at Fowler and Shields often is horribly dirty and unkept. Store should do a better job maintaining and cleaning.
- I would love if our city council would do something about the speeding. Especially near Teague elementary. I take my kids to the park and library near there often and have almost been hit multiple times while crossing the crosswalk there. It's extremely dangerous and scary. Also, the streets in the area are horrible. It would be awesome if we could get them repaved just like some of the richer areas in Fresno I see.
- Cleanliness, building new affordable homes. Schooling needs. Safety for kids that walk home from school. Transportation for the elderly for the ones that can't afford it or aren't eligible.
- Homeless, mental health, housing
- It has been neglected for far too long.
- that we need more shopping centers and grocery stores.
- The school violence, drunk driving.
- That there needs to be a stop to the crime in Fresno.
- Crime
- Invest in more housing, schools, roads, parks, CLEAN AIR, less industrial buildings.
- More LGBT safety and support especially for trans people
- City Council members need to listen to all of their voting constituents' needs and affording housing and overall sustainable living has been an issue in this district for over 20 years
- Homelessness and cleanliness of streets and public areas. Need more trash bins and places to dump large items
- There are no cultural events in district 2
- More money invested in the work of artists, a focus on intermediary businesses (between street vendors and those who rent premises)
- the roads are in poor condition and the air is polluted and there is more security
- When it comes to buying a house, rents are too expensive. If you want to buy a house, they ask for 10 percent for the price of a house. That's because Fresno's economy has gone up
- They must be people who are knowledgeable about the topics at hand, who dedicate time to people who have questions.
- That there is almost no help for homeowners and even less for Latino people and we can never take the help they offer because it is very difficult to access those incentives and our neighborhoods are the oldest and most forgotten and they only give us industries and never green areas. It is fair that they should look at us and not only focus on the northern area. I believe that we all have the same right to live in decent homes and we all pay taxes, but the south is always the most forgotten area and full of industries and that Reduce salaries because everything is going up in the basic basket and the salary only goes up a little.