



Fresno COG 2050 Growth Forecast

February 22, 2017

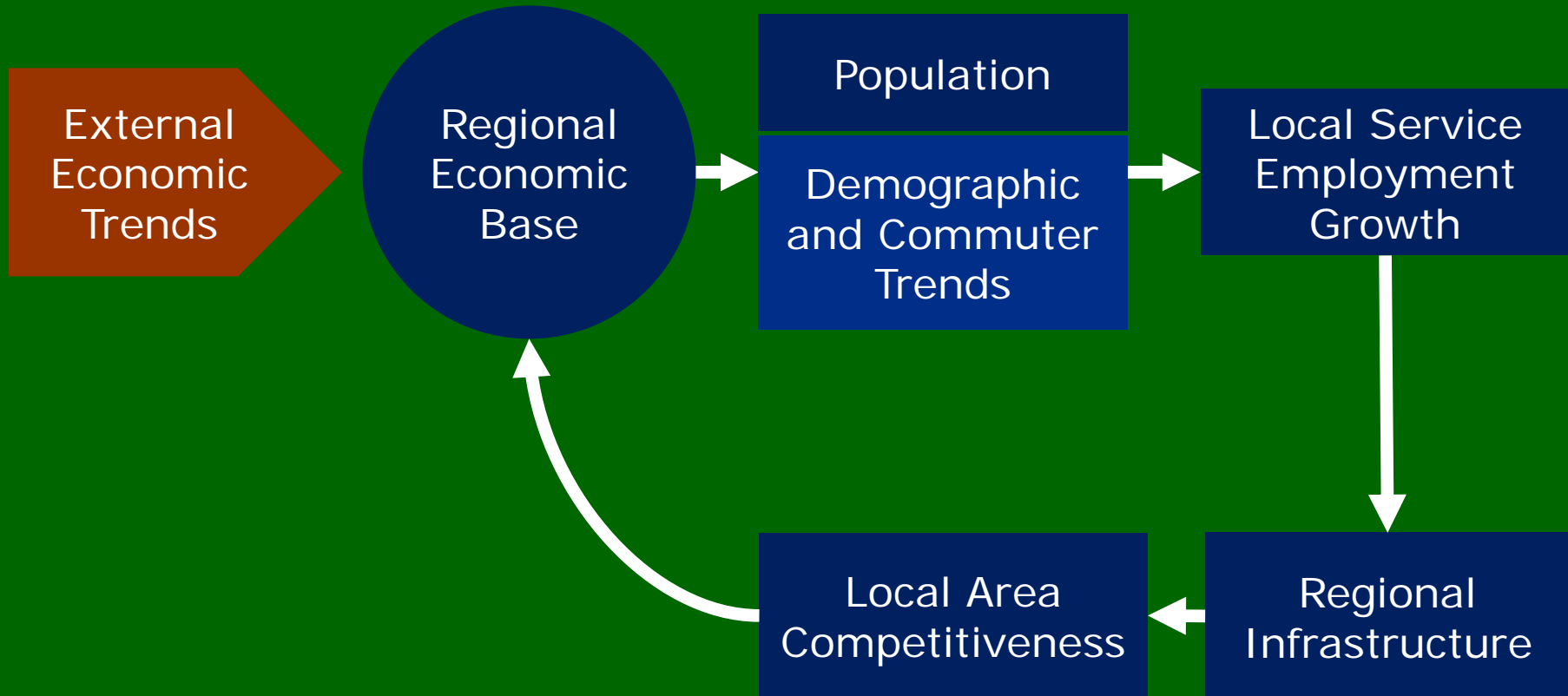
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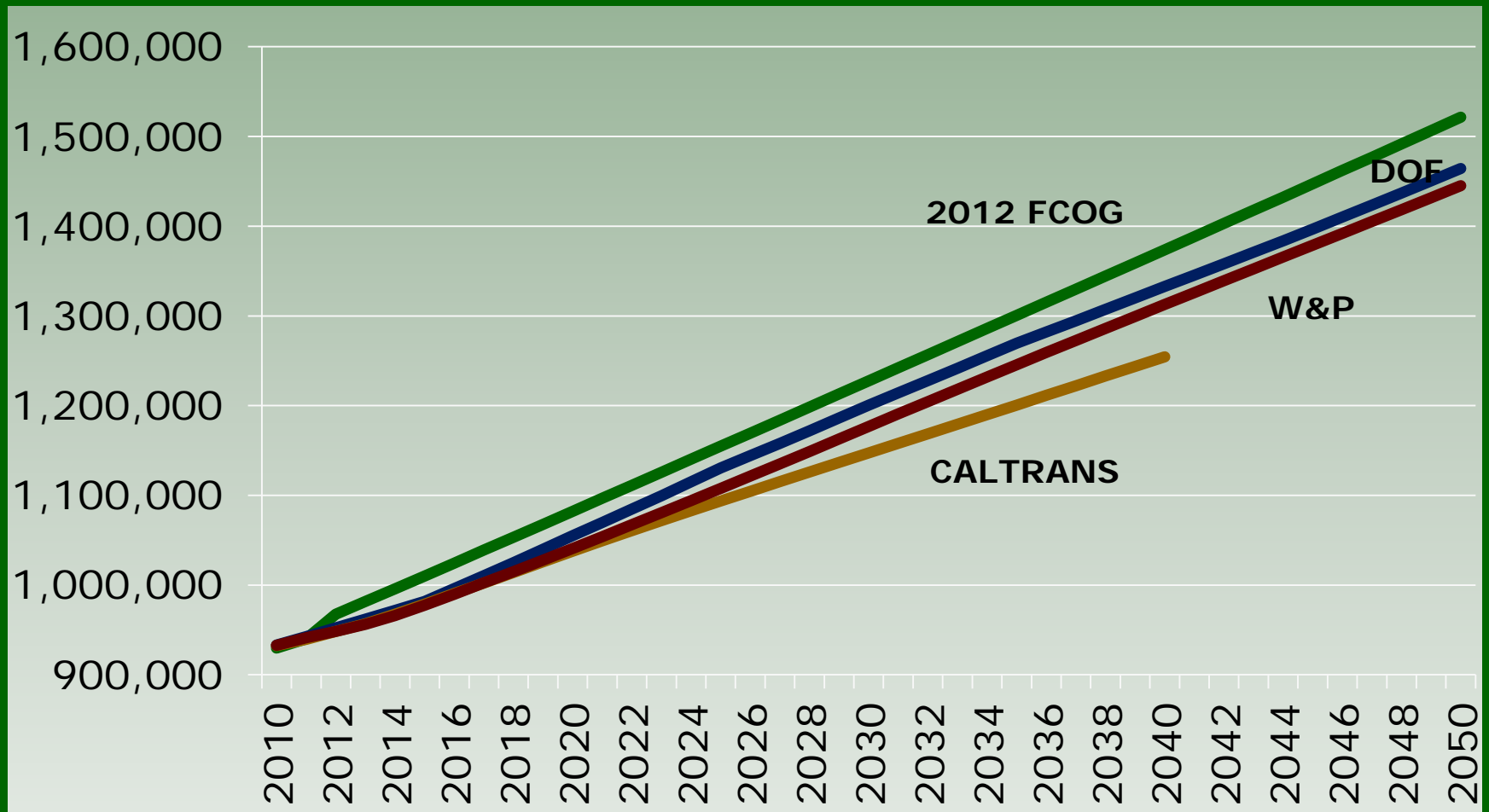
Presentation Agenda

- Overview of Study Process
- Countywide Population and Employment
- Local Population and Housing Allocations
- Local Employment Allocations
- Household Income
- Further Discussion

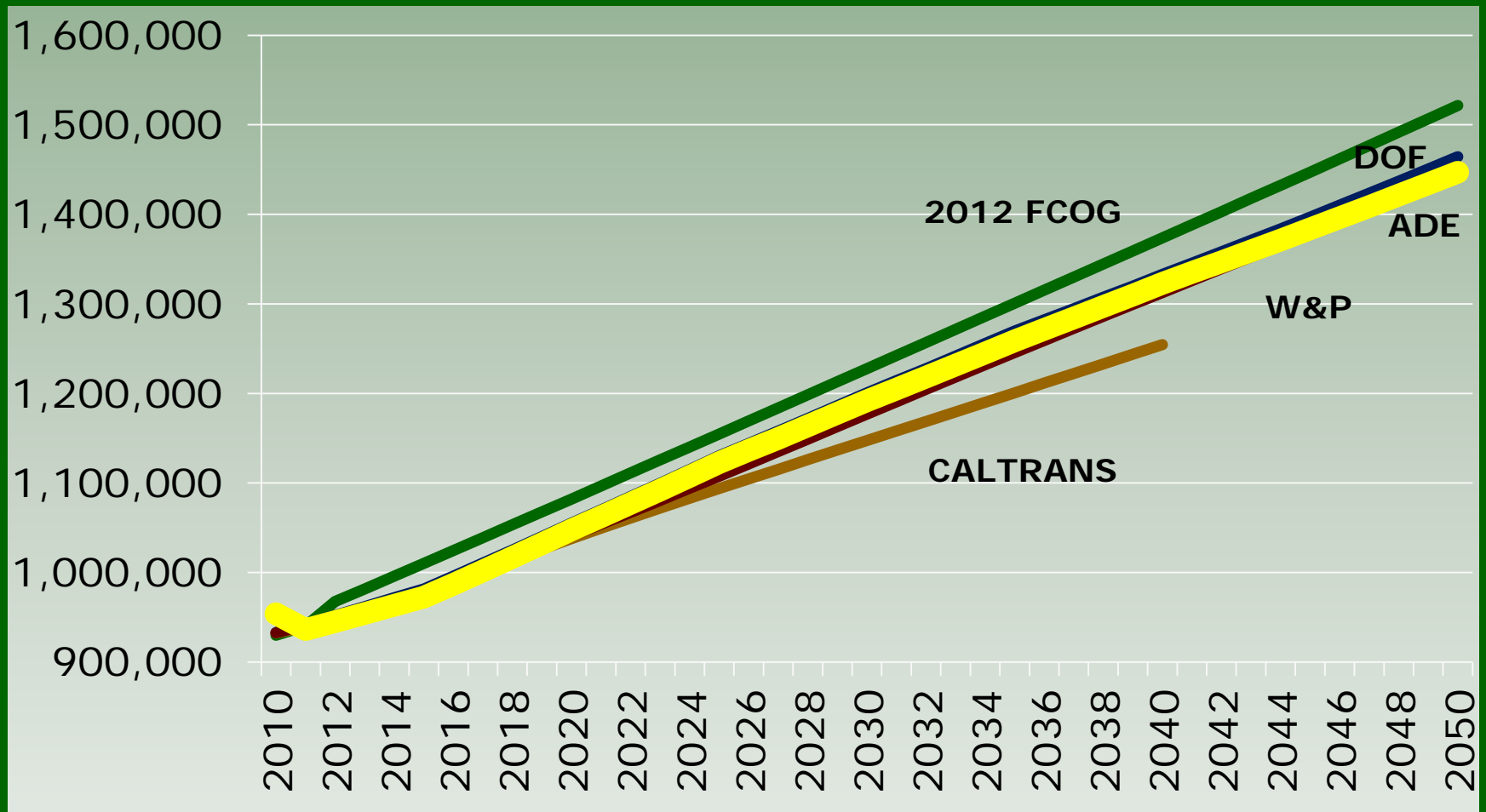
Growth Projection Study Process



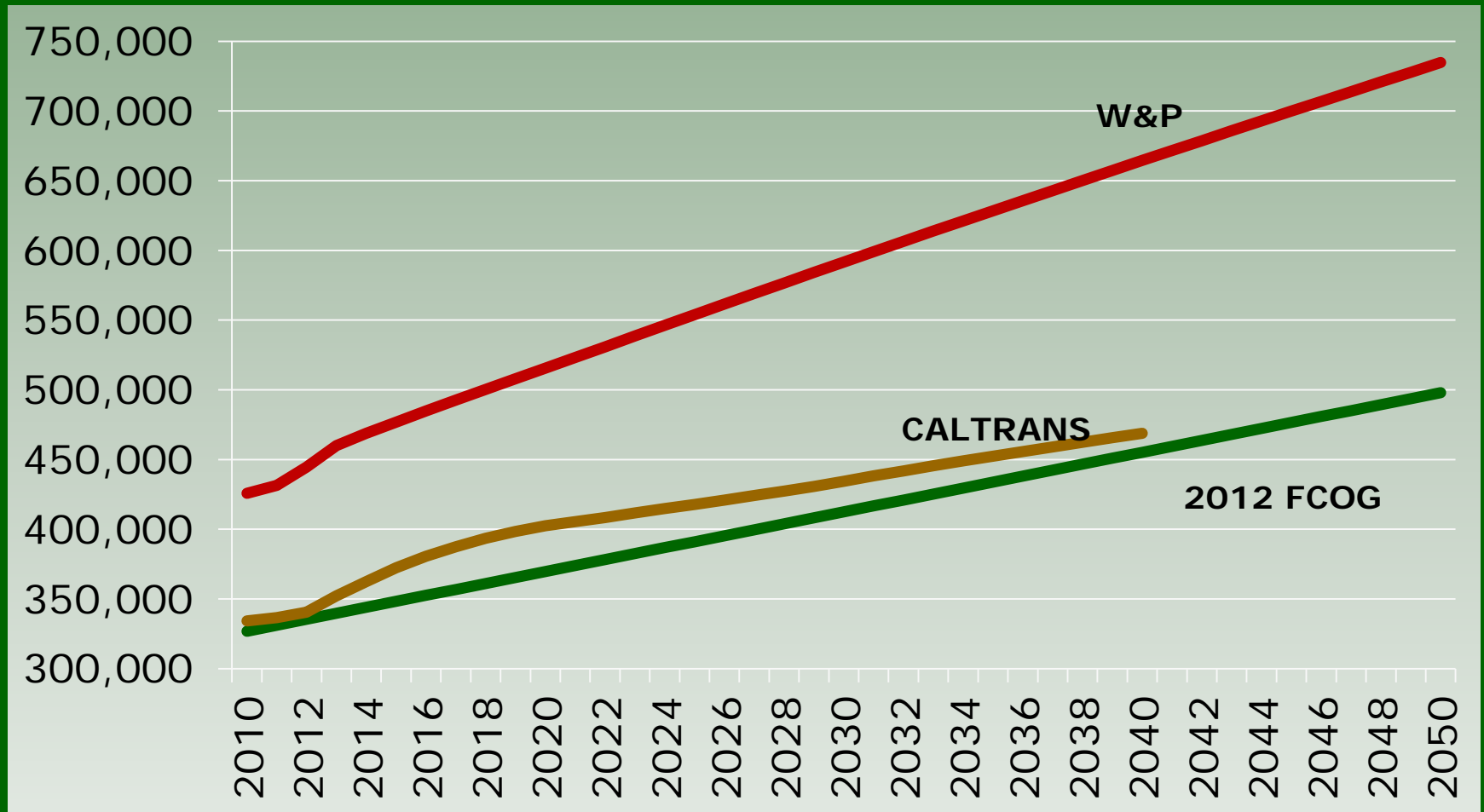
Population Projections



Population Projections



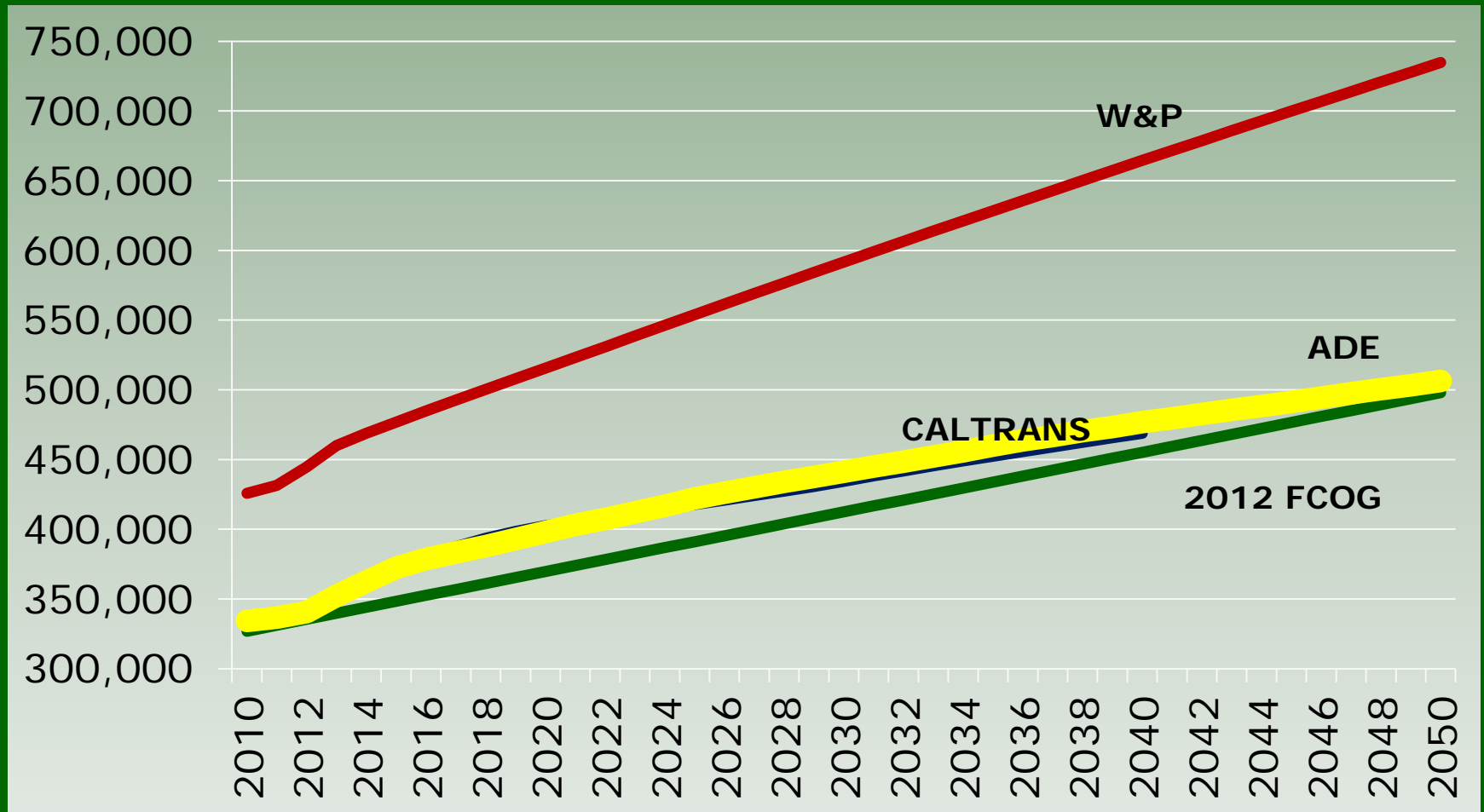
Employment Projections



Countywide Employment

- Economic Base Projection
 - Slower farm employment growth
 - Flat manufacturing growth
 - Increasing growth in logistics/distribution
- Local Serving and B2B jobs
 - Big growth in health care
 - Declining ratio of jobs to population due to retail consolidation and increasing internet sales

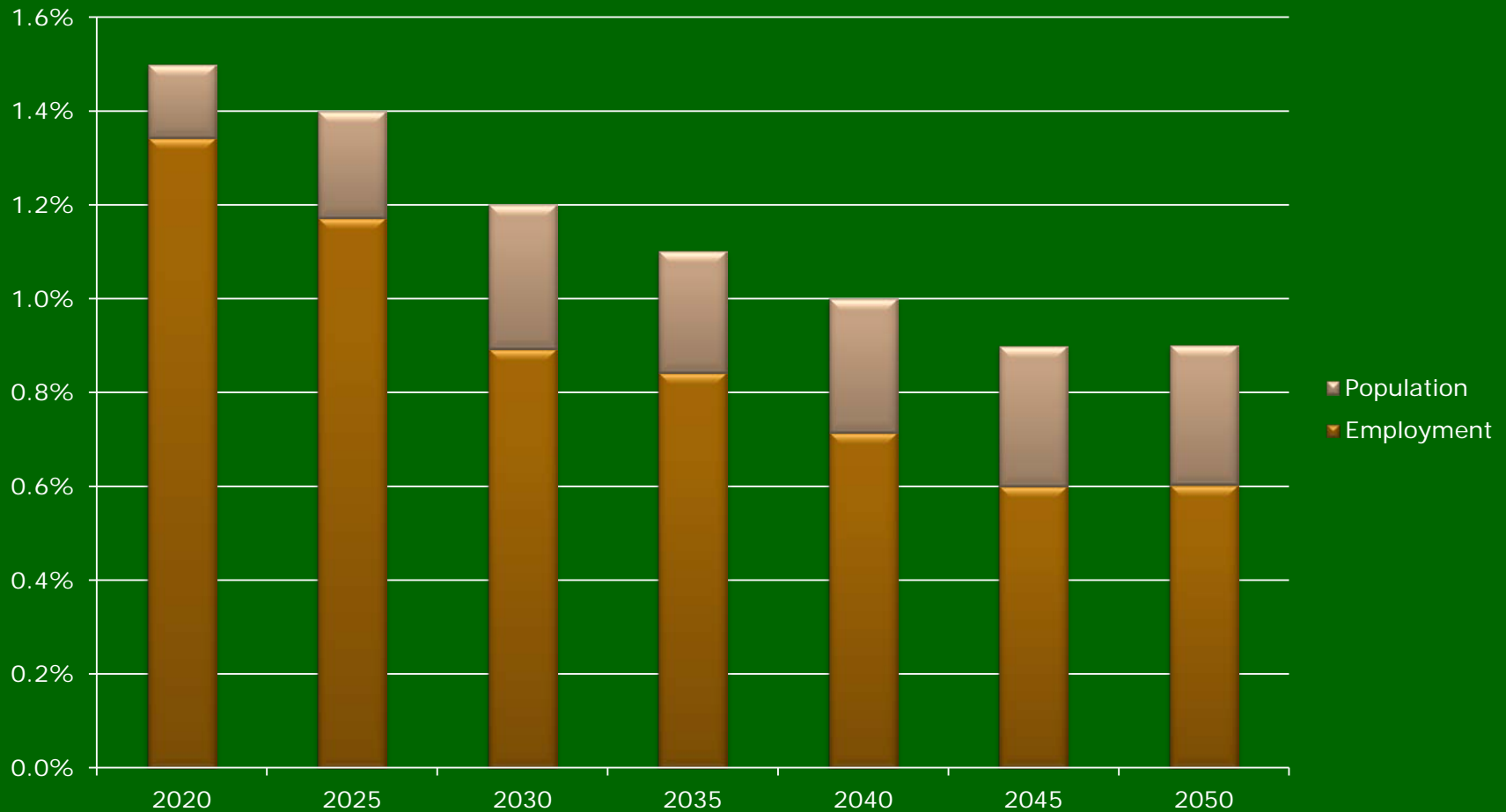
Employment Projections



Job Growth by Sector

Job Sector	Growth 2015-2050	CAGR
Agriculture	2,900	0.2%
Mfg./Mining	-600	-0.1%
Other Industrial	25,300	1.1%
Retail	16,700	1.1%
Office	19,200	1.0%
Education	18,200	1.1%
Health Services	33,300	1.3%
Hospitality	13,800	1.0%
Government	5,100	0.4%
Total	133,900	0.9%

Population and Jobs Growth Rates



Age Cohort Projection

Age Group	15-50 CAGR	2015 Share	2050 Share
Total	1.1%	100.0%	100.0%
5 and below	1.0%	9.5%	9.1%
6 to 14	0.9%	14.1%	12.8%
15 to 19	0.8%	7.7%	6.8%
20 to 24	0.5%	8.3%	6.7%
25 to 34	0.7%	14.8%	12.8%
35 to 44	1.1%	12.2%	11.8%
45 to 54	1.0%	11.6%	11.1%
55 to 64	1.3%	10.4%	11.1%
65 to 74	1.9%	6.6%	8.5%
75 and above	3.0%	4.9%	9.2%

Population by Race/Ethnicity

Year	White	Latino	Asian	Black	Other
2015	301,300	506,800	92,300	46,200	25,700
2020	306,800	563,500	100,300	49,300	27,500
2025	310,400	622,600	108,300	52,300	29,300
2030	309,900	681,100	115,100	54,700	31,000
2035	307,100	741,500	121,000	56,700	32,600
2040	302,500	802,600	126,100	58,000	33,900
2045	300,400	860,000	130,000	58,600	34,600
2050	299,600	919,300	133,900	59,000	35,200
Change	-1,700	412,500	41,600	12,800	9,500

Countywide School Enrollment

Year	School Age Pop.	Enrollment	Participation Rate
2015	212,100	197,000	92.9%
2020	219,400	203,100	92.6%
2025	229,900	212,000	92.2%
2030	240,600	221,100	91.9%
2035	252,800	231,500	91.6%
2040	261,500	238,500	91.2%
2045	268,700	244,300	90.9%
2050	282,800	256,100	90.6%

Local Population Allocation

- Analysis of recent city growth trends
- Age cohort projection by race/ethnicity and gender
- Analysis of short term pipeline projects and long term land capacity by jurisdiction
- Adjustments to net migration

Population by Jurisdiction (SOI)

Jurisdiction	2015	2050	Change	Percent Change
Total	972,300	1,447,090	474,790	48.8%
Clovis	114,770	177,210	62,440	54.4%
Coalinga	16,530	21,700	5,170	31.3%
Firebaugh	7,780	11,060	3,280	42.2%
Fowler	6,580	10,710	4,130	62.8%
Fresno	574,590	903,790	329,200	57.3%
Huron	6,820	8,330	1,510	22.1%
Kerman	14,880	21,330	6,450	43.3%
Kingsburg	12,750	18,570	5,830	45.7%

Population by Jurisdiction (SOI)

Jurisdiction	2015	2050	Change	Percent Change
Mendota	11,210	15,690	4,480	40.0%
Orange Cove	9,360	10,480	1,120	12.0%
Parlier	15,100	19,980	4,880	32.3%
Reedley	25,570	35,580	10,010	39.1%
Sanger	26,310	36,100	9,780	37.2%
San Joaquin	4,040	5,750	1,710	42.3%
Selma	26,680	36,550	9,870	37.0%
Uninc. Area	99,330	114,270	14,940	15.0%

Households and Housing

- Countywide trends in household size applied to each jurisdiction
- Household size has been increasing slightly since 2000. It is projected to stabilize through 2025 and then continue increasing.
- 1.8% share in group housing expected to remain constant – prison pop declining but seniors increasing.
- Housing demand based on households and vacancy rate analysis
- SF = 70% of existing stock but 80% of pipeline

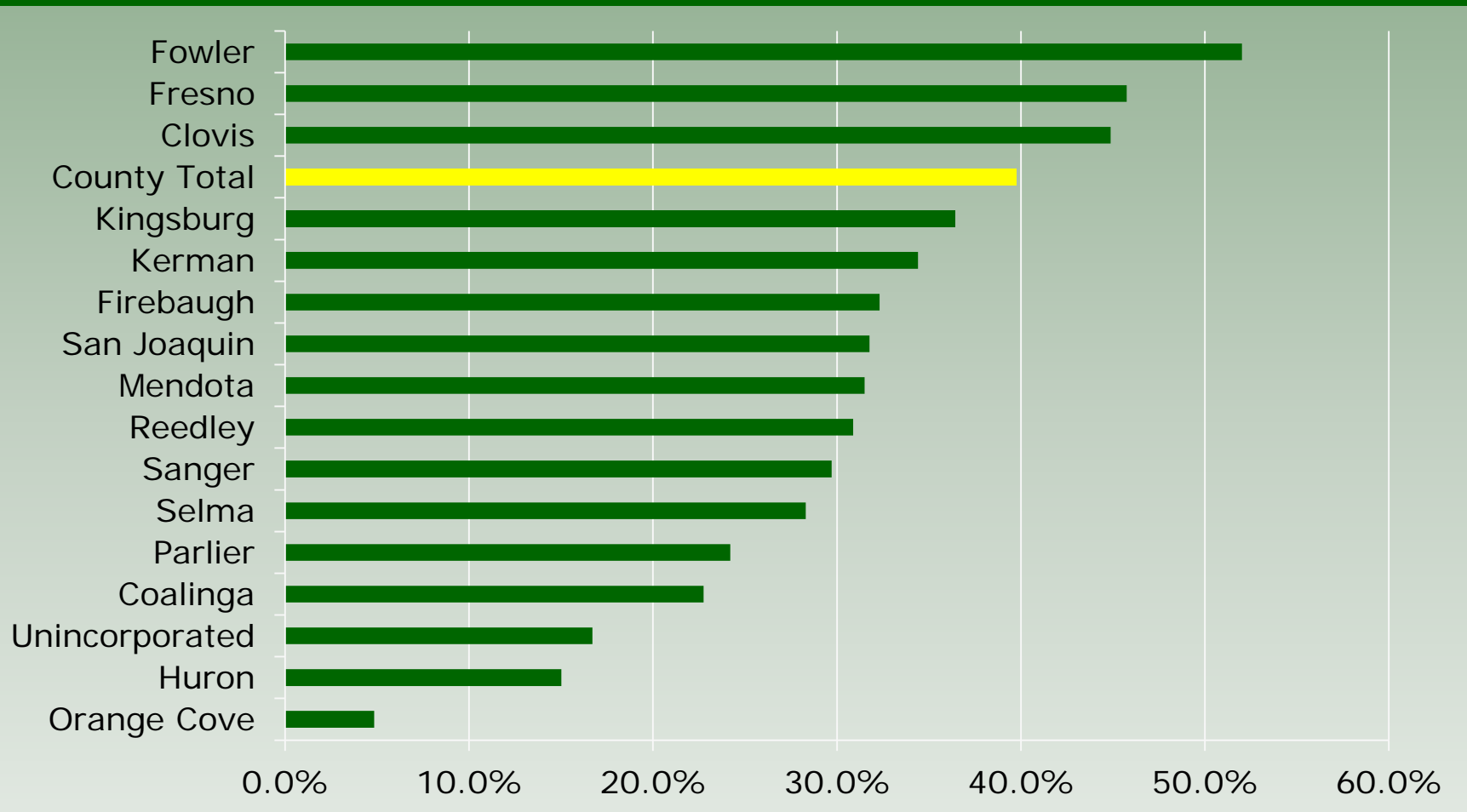
Housing Growth by Jurisdiction (SOI): 2015-2050

Jurisdiction	Total	Single Fam.	Multi- Fam.	RHNA Absorp. (Years)
Total	129,180	98,110	31,070	11
Clovis	18,770	13,800	4,970	12
Coalinga	990	300	690	21
Firebaugh	690	500	190	35+
Fowler	1,120	800	320	16
Fresno	89,400	69,400	20,000	9
Huron	240	100	140	35+
Kerman	1,460	500	960	22
Kingsburg	1,640	1,500	140	8

Housing Growth by Jurisdiction (SOI): 2015-2050

Jurisdiction	Total	Single Fam.	Multi- Fam.	RHNA Absorp. (Years)
Mendota	810	500	310	24
Orange Cove	110	100	10	35+
Parlier	870	600	270	23
Reedley	2,210	600	1,610	21
Sanger	2,160	1,700	460	19
San Joaquin	310	200	110	35+
Selma	2,190	1,800	390	10
Uninc. Area	6,200	5,700	500	15

Percent Housing Growth by Jurisdiction



Employment by Jurisdiction

- Historical trends in city shares of county economic base jobs
- Local serving jobs tied to population growth in each City
- Review of pipeline non-residential development projects

Employment by Jurisdiction (SOI)

Jurisdiction	2015	2050	Change	Percent Change
Total	372,400	506,300	133,900	36.0%
Clovis	32,400	45,740	13,340	41.2%
Coalinga	2,820	3,780	960	34.0%
Firebaugh	1,140	1,580	440	38.6%
Fowler	2,400	3,540	1,140	47.5%
Fresno	231,560	326,450	94,890	41.0%
Huron	730	910	180	24.7%
Kerman	2,680	3,860	1,180	44.0%
Kingsburg	3,540	5,150	1,610	45.5%

Employment by Jurisdiction (SOI)

Jurisdiction	2015	2050	Change	Percent Change
Mendota	890	1,100	210	23.6%
Orange Cove	540	720	180	33.3%
Parlier	2,230	2,970	740	33.2%
Reedley	5,770	9,330	3,560	61.7%
Sanger	5,490	7,450	1,960	35.7%
San Joaquin	500	690	190	38.0%
Selma	5,550	7,910	2,360	42.5%
Uninc. Area	74,160	85,120	10,960	14.8%

Household Income Projection

Year	Mean Hshld Income	CAGR
2015	\$63,900	
2020	\$67,600	1.1%
2025	\$72,500	1.4%
2030	\$77,500	1.4%
2035	\$82,100	1.2%
2040	\$85,800	0.9%
2045	\$88,900	0.7%
2050	\$91,800	0.6%

Further Discussion



Planning for Sustainable Prosperity

