

Fresno, California

Indicators Report

by
The National Economic Education Delegation (NEED)

April 20, 2024

Exploring the economics, demographics, and well-being of Fresno and its residents through indicators.

This report was produced by the:

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Executive Summary

Assessing the City with Indicators

About this Report

This report provides background or summary information for the city of Fresno (the City) in the form of indicators.

Using this Report

Indicators are measures of various aspects of a regional economy. They help to provide an indication of the quality of life in a region and progress toward improving conditions in the local economy. This report focuses on indicators

for changing demographics, incomes, housing markets, commute patterns, and employment in Fresno. These indicators are compared to Fresno County (the County) as a whole, a broader region where one is well defined, California, and the United States.

This report is vital for understanding trends in the underlying economy. It does not provide forecasts, but Rob Eyler and Jon Haveman at Economic Forensics and Analytics are available to provide them if that is of interest.

Topics Covered:

- **Demographics:** A detailed snapshot of Fresno demographics is presented. This provides evidence on the size, age and sex, income and poverty status, race and ethnicity, housing status, living arrangements, education, health, and transportation choices of the population. Beyond the current population level, data on trends in local population growth, in comparison with other broader regions is presented, in both tabular and graphical form.
- **Employment Report:** Here, we provide a brief snapshot of employment and unemployment in Fresno and how the City's experience differs from broader regions.
- **Income and Earnings:** Vital to understanding the prosperity of a city relative to its surrounding area is information on income and earnings. We provide a ranking of the City's income relative to all cities in California as well as growth relative to local regions. Inequality and poverty status are also important indicators for the level of equity in the community. We provide evidence of trends in both, not only for all residents, but also for children separately.
- **Housing:** This section provides evidence on the cost and availability of housing. Both median home values and rental costs are included, along with detailed information on home ownership, by age and income, in particular. Further, evidence is provided on the housing burden in the City, again, in comparison with other broader regions. We also provide evidence on the rate at which new buildings and units are permitted along with a broader housing picture. Finally, we provide evidence on the age of the housing stock in Fresno, along with information on how long the City's residents have been in place.
- **Transportation:** Increasingly important, in the wake of the pandemic, is an understanding of the transportation patterns and choices of local residents. We provide detailed evidence on the proportion of residents who work from home and on the various transportation choices of those who head to the office. This information is also provided for those who work in Fresno, but do not necessarily live in Fresno.
- **Migration:** Population changes comes primarily through organic causes: births and deaths. Migration between regions also plays a significant role in population growth. A final section of the report provides evidence on migration into and out of the City.

Contents

Executive Summary	1
Assessing the City with Indicators	1
Demographics	3
A Demographic Snapshot	3
Current Population	5
Employment Report	8
Citywide Employment and Unemployment	8
County Employment by Industry	9
Some Employee Detail	10
Income and Earnings	16
Per Capita Personal Income Growth	16
Poverty and Inequality	19
Housing	21
Housing Costs and Affordability	21
Housing Picture	25
Vintage of Residential Housing	27
Occupation of Residential Housing	29
Residential Permitting	31
Commute Patterns	34
Mode of Transportation	34
Commute Times for Employed Residents	36
Commute Times for Those Employed in the City	37
Place of Work	38
Commute Mode by Income	40
Commute Mode by Poverty Status	41
Migration	42
Overall Migration Flows	42
Demographics of Migration Flows	44
References and Sources	46

Demographics

Definition:

Data on the demographics of a city indicate the nature of the population, with a focus on age, gender, race and ethnicity, as well as household composition.

Why is it important?

The characteristics and growth of Fresno's population are fundamental indicators of the city's growth potential.

A Demographic Snapshot

Statistic	2022	2019
POPULATION		
Population Estimate (#, 5yr)	541,528.0	525,010.0
Veterans (#, 5yr)	18,399.0	18,889.0
Foreign born persons (% , 5yr)	19.0	20.4
Population age 25+ (#, 5yr)	333,048.0	318,512.0
AGE AND SEX		
Persons under 5 years (% , 5yr)	7.5	8.2
Persons under 18 years (% , 5yr)	27.8	28.4
Persons 65 years and over (% , 5yr)	11.9	11.1
Female persons (% , 5yr)	50.1	50.9
INCOME AND POVERTY		
Median household income (\$, 5yr)	63,001.0	50,432.0
Per capita income in past 12 months (\$, 5yr)	29,293.0	23,564.0
Persons in poverty (% , 5yr)	22.1	25.2
Children age less than 18 in poverty (#, 5yr)	45,033.0	52,277.0
Children age less than 18 in poverty (% , 5yr)	30.4	35.6
RACE AND ETHNICITY		
White alone (% , 5yr)	44.3	60.5
African American alone (% , 5yr)	6.6	7.4
American Indian or Alaska Native alone (% , 5yr)	1.3	1.2
Asian alone (% , 5yr)	14.1	13.8
Native Hawaiian and Other Pacific Islander alone (% , 5yr)	0.2	0.1
Two or More Races (% , 5yr)	18.5	4.2
Hispanic or Latino (% , 5yr)	50.5	49.6
White alone, not Hispanic or Latino (% , 5yr)	25.4	26.9
HOUSING		
Housing units (#, 5yr)	186,461.0	178,831.0
Owner-occupied housing units (% , 5yr)	48.1	46.7
Median value of owner-occupied housing units (\$, 5yr)	321,800.0	242,000.0
Median selected monthly owner costs-with a mortgage (\$, 5yr)	1,811.0	1,584.0
Median selected monthly owner costs-without a mortgage (\$, 5yr)	576.0	474.0
Median gross rent (\$, 5yr)	1,227.0	1,005.0
FAMILIES AND LIVING ARRANGEMENTS		
Households (#, 5yr)	177,757.0	168,625.0
Persons per household (#, 5yr)	3.0	3.1
Living in same house 1 year ago, % of persons age 1+ (5yr)	85.8	82.1
EDUCATION		
High school graduate or higher, % of persons age 25+ (5yr)	79.7	77.4
Bachelor's degree or higher, % of persons age 25+ (5yr)	24.4	21.9
HEALTH		
With a disability, under age 65 years (#, 5yr)	48,870.0	48,598.0
Persons without health insurance, under age 65 years (% , 5yr)	6.6	8.0
LABOR FORCE		
In civilian labor force, persons age 16+ (% , 5yr)	62.2	61.9
In civilian labor force, women age 16+ (% , 5yr)	56.8	56.6
Employed, persons age 16+ (% , 5yr)	54.9	54.5
Self employed (% , 5yr)	7.8	7.7
TRANSPORTATION		
Mean travel time to work, workers age 16+ (Mins., 5yr)	20.3	21.1
Drive alone in private vehicle (% , 5yr)	75.2	77.8
Using public transportation (% , 5yr)	1.8	2.5
Worked from home (% , 5yr)	8.8	4.7

Source: American Community Survey, Summary Files

Note: Data are from the 1-year files unless indicated by the notation 5yr.

Current Population

The data in these two tables and the following two graphs are from the CA Department of Finance (DOF). The DOF produces population estimates for geographies around California twice a year: January and July. As estimates for cities are only available in January, these two tables are based on the January data. The remaining figures are from the American Community Survey (ACS), provided annually by the U.S. Bureau of the Census.

Table 1. Population Change by Region
(Thousands, January to January)

Region	2023 Population	% Change		
		1 Year	3 Year	5 Year
City				
Fresno	543,428	0.11	-0.00	2.23
County and Broader Regions				
Fresno County	1,011,499	0.17	-0.86	0.42
South Central Valley	3,534,481	0.01	-0.90	0.05
California	38,940,231	-0.35	-1.79	-2.01

Source: CA DOF; Calculations by National Economic Education Delegation

Table 2. County Population Change by City
(Thousands, January to January)

City	2022	2023	% Change		
			Local	South Central Valley	California
Fresno County	1,009.8	1,011.5	0.17	0.01	-0.35
Fresno	542.8	543.4	0.11		
Clovis	123.5	124.5	0.80		
Sanger	26.3	26.2	-0.23		
Reedley	24.9	25.4	1.75		
Selma	24.4	24.3	-0.22		
Coalinga	17.3	17.2	-0.52		
Kerman	16.6	17.0	2.11		
Parlier	14.5	14.4	-0.48		
Kingsburg	12.4	12.9	3.48		
Mendota	12.5	12.5	-0.10		
Orange Cove	9.5	9.5	-0.71		
Firebaugh	8.4	8.5	0.89		
Fowler	6.9	7.2	3.34		
Huron	6.2	6.1	-0.71		
San Joaquin	3.6	3.6	-0.72		

Source: CA DOF; Calculations by National Economic Education Delegation

Figure 1: Population Growth (1)

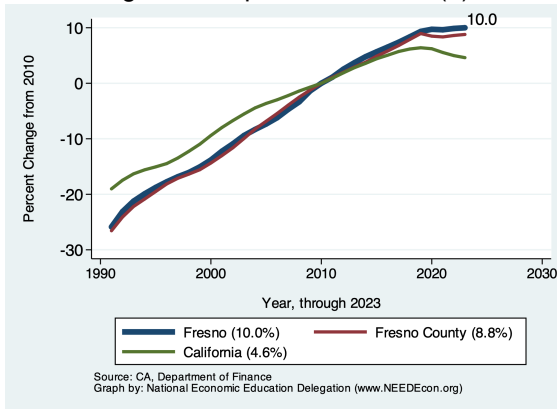


Figure 2: Population Growth (2)

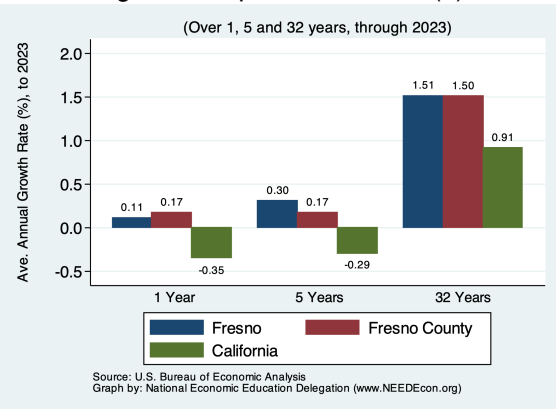


Figure 3: Population by Age - Detailed Age Categories

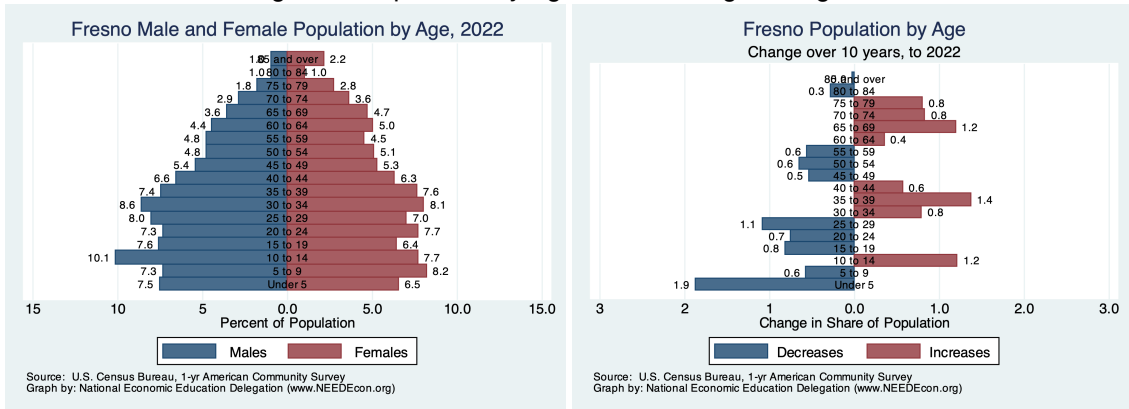


Figure 4: Population by Age - Broad Age Categories

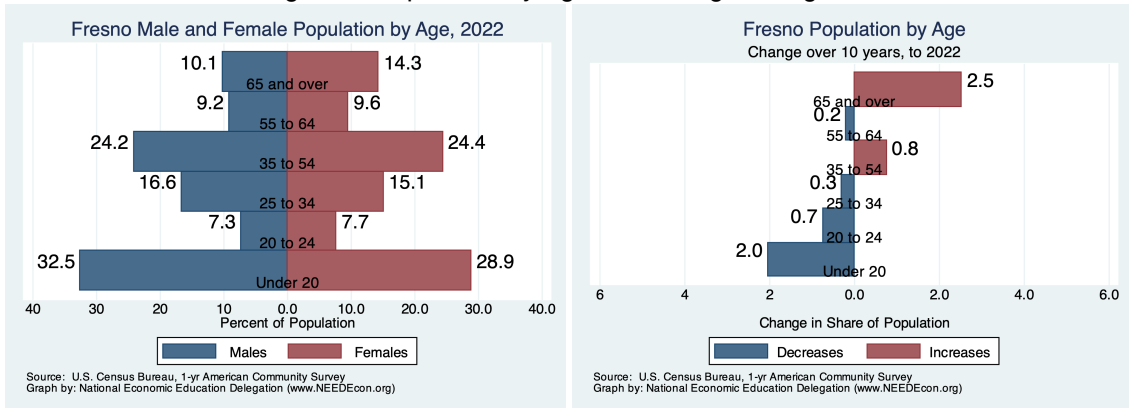


Figure 5: Population by Educational Attainment

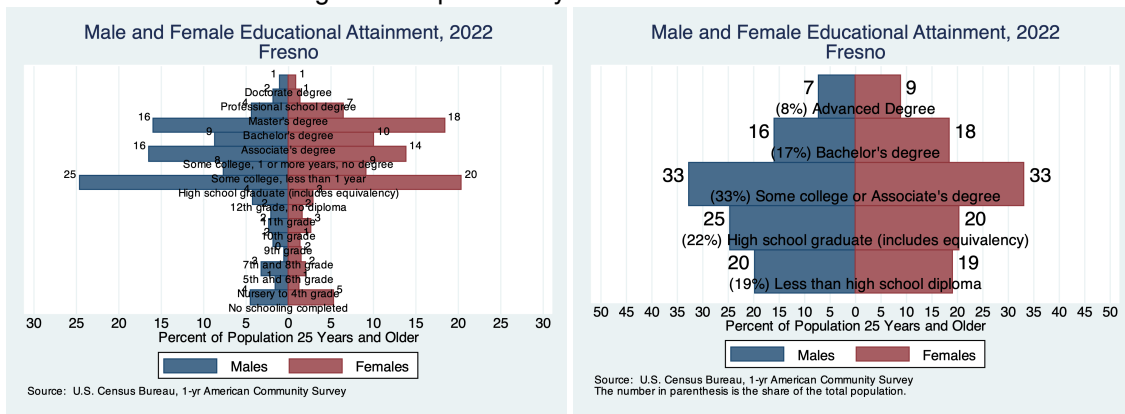


Figure 6: Population by Race/Ethnicity

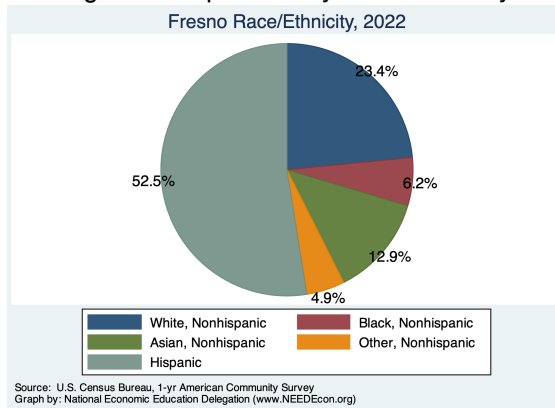
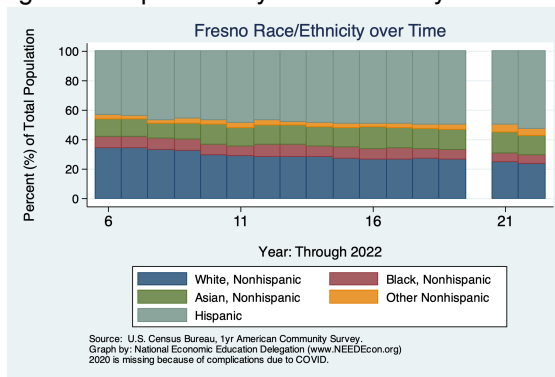


Figure 7: Population by Race/Ethnicity Over Time



Employment Report

Citywide Employment and Unemployment

Definition:

Each month, California's Employment Development Division (EDD) publishes an update on employment in California and in MSAs, counties, and cities all across the state. The report focuses primarily on non-farm employment, providing estimates of changes in em-

ployment by industry as well as unemployment in each region. Data for cities is limited to aggregate employment, labor force, and unemployment data. Those are reported below.

Why is it important?

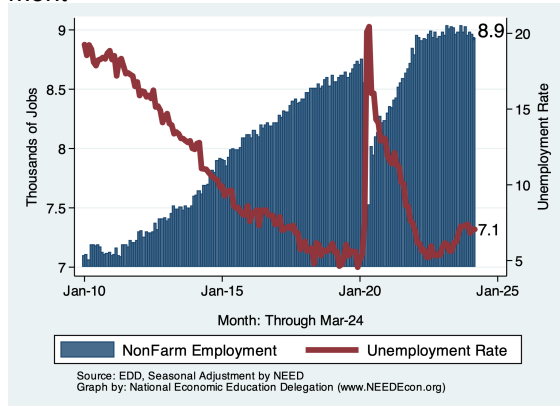
Employment growth is a fundamental indicator of the health of an economy.

Table 3. Fresno Summary for March, 2024

Category	Current Value	Change From:		
		Last Month	2 Months Ago	Last Year
Employment	8,924	-30	-53	-103
Labor Force	9,644	9	15	96
Number Unemployed	678	-4	21	97
Unemployment Rate	7.0	-0.0	0.2	0.9

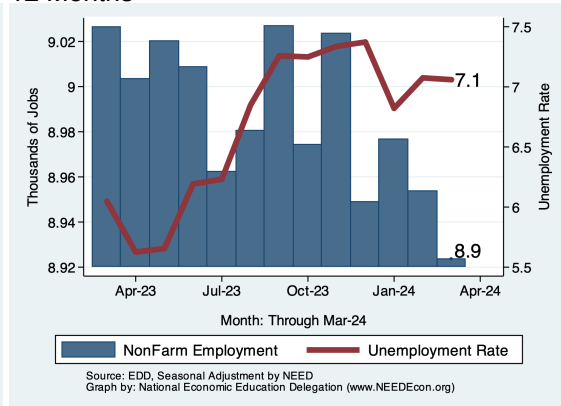
Source: EDD, National Economic Education Delegation

Figure 8: Historical Employment and Unemployment - Last 12 Months



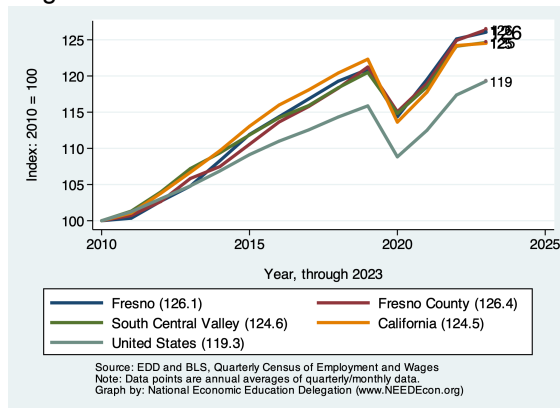
Source: EDD, Seasonal Adjustment by NEED
Graph by: National Economic Education Delegation (www.NEEDEcon.org)

Figure 9: Employment and Unemployment - Last 12 Months



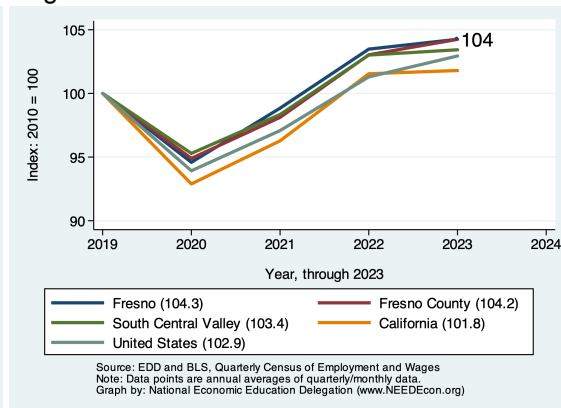
Source: EDD, Seasonal Adjustment by NEED
Graph by: National Economic Education Delegation (www.NEEDEcon.org)

Figure 10: Relative Employment Growth Across Regions - since 2010



Source: EDD and BLS, Quarterly Census of Employment and Wages
Note: Data points are annual averages of quarterly/monthly data.
Graph by: National Economic Education Delegation (www.NEEDEcon.org)

Figure 11: Relative Employment Growth Across Regions - since 2019



Source: EDD and BLS, Quarterly Census of Employment and Wages
Note: Data points are annual averages of quarterly/monthly data.
Graph by: National Economic Education Delegation (www.NEEDEcon.org)

County Employment by Industry

California's Employment Development Division (EDD) does not regularly produce data on employment by industry for cities. However, we are able to report industry-level employment data for Fresno County. The following table provides the latest data for the County.

Table 4. Employment Growth by Industry in Fresno County for March, 2024

Industry	Employment	Share	Empl Growth	% Growth - Annualized Rate					
				Month	Qtr	6mo	1yr	3yr	5yr
Total Nonfarm	394,605	100.0	1,539.3	4.8	3.3	3.8	2.9	4.3	1.9
Total Private	315,531	80.0	1,168.0	4.6	1.4	3.3	2.4	4.2	2.1
Goods Producing	50,339	12.8	-22.4	-0.5	-3.7	2.3	3.7	3.4	2.4
Mining, Logging and Construction	23,356	5.9	355.8	20.2	-0.8	2.0	5.3	5.9	4.8
Mining and Logging	300	0.1	0.0	0.0	0.0	0.0	50.0	16.7	10.0
Construction	23,137	5.9	412.6	24.1	0.8	2.4	4.9	5.7	4.7
Manufacturing	27,237	6.9	-2.5	-0.1	-1.6	5.0	2.3	1.7	0.9
Durable Goods	8,650	2.2	-40.4	-5.4	-5.0	-3.9	-3.3	-1.4	-0.8
Non-Durable Goods	18,549	4.7	31.5	2.1	-0.2	9.0	5.1	3.4	1.8
Service Providing	343,681	87.1	1,093.8	3.9	3.9	3.6	2.7	4.4	1.8
Trade, Trans & Utilities	77,528	19.6	307.8	4.9	2.2	3.7	1.8	2.3	2.4
Wholesale Trade	15,900	4.0	0.0	0.0	0.0	-2.5	0.6	3.5	2.4
Retail Trade	40,665	10.3	212.8	6.5	1.1	1.8	1.2	1.7	1.0
Trans & Warehousing	18,062	4.6	149.5	10.5	13.3	11.2	5.3	3.4	6.3
Information	2,700	0.7	200.0	151.8	16.3	-7.0	-18.2	-1.2	-4.1
Financial Activities	12,450	3.2	-19.8	-1.9	-16.1	-2.4	0.1	-2.2	-2.6
Finance & Insurance	7,265	1.8	50.6	8.8	-21.8	-3.7	-1.3	-5.0	-4.6
Real Estate & Rental & Leasing	5,135	1.3	-97.0	-20.1	-8.2	-2.4	2.0	2.8	1.2
Professional & Business Svcs	33,264	8.4	368.7	14.3	4.8	4.9	-0.1	2.0	-0.7
Prof, Sci, & Tech	11,725	3.0	-93.1	-9.1	-0.0	-2.9	-1.7	1.1	0.5
Admin & Support Svcs	16,767	4.2	387.7	32.4	5.4	9.9	-0.9	1.7	-2.9
Educational & Health Svcs	86,081	21.8	254.2	3.6	5.4	4.1	4.6	5.7	3.9
Education Svcs	4,635	1.2	-100.1	-22.6	-13.1	-9.7	-3.3	12.0	3.0
Health Care & Social Assistance	81,407	20.6	302.9	4.6	7.0	4.9	5.2	5.4	4.0
Leisure & Hospitality	38,392	9.7	-87.5	-2.7	-2.7	1.1	1.6	9.4	1.6
Accommodation & Food Svcs	32,848	8.3	-108.5	-3.9	-4.3	-1.6	-0.6	6.7	0.6
Other Svcs	14,494	3.7	43.6	3.7	4.5	4.2	2.8	9.7	4.5
Government	78,831	20.0	161.0	2.5	6.3	5.8	4.7	4.5	0.9
Federal	9,622	2.4	9.7	1.2	3.1	-0.5	1.4	-2.1	-1.0
State	12,792	3.2	-16.2	-1.5	0.2	1.1	2.4	2.3	0.1
Local	56,423	14.3	175.5	3.8	8.3	8.0	5.9	6.6	1.6
County	8,245	2.1	168.4	28.1	12.6	10.1	6.3	1.5	1.1
City	6,666	1.7	-9.3	-1.7	4.1	10.1	6.4	6.0	3.3
Local Government Education	38,286	9.7	90.1	2.9	7.9	5.7	6.1	7.8	1.5

Source: EDD, National Economic Education Delegation (NEED)

Some Employee Detail

Employed in Fresno

Figure 12: Employment by Occupation

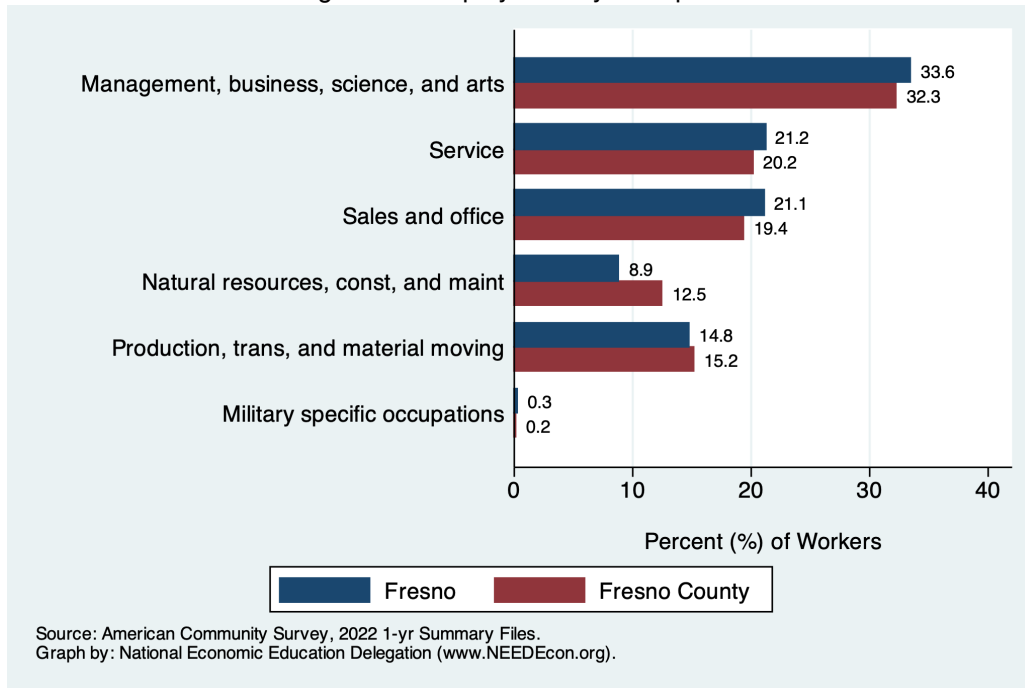


Figure 13: Employment by Industry

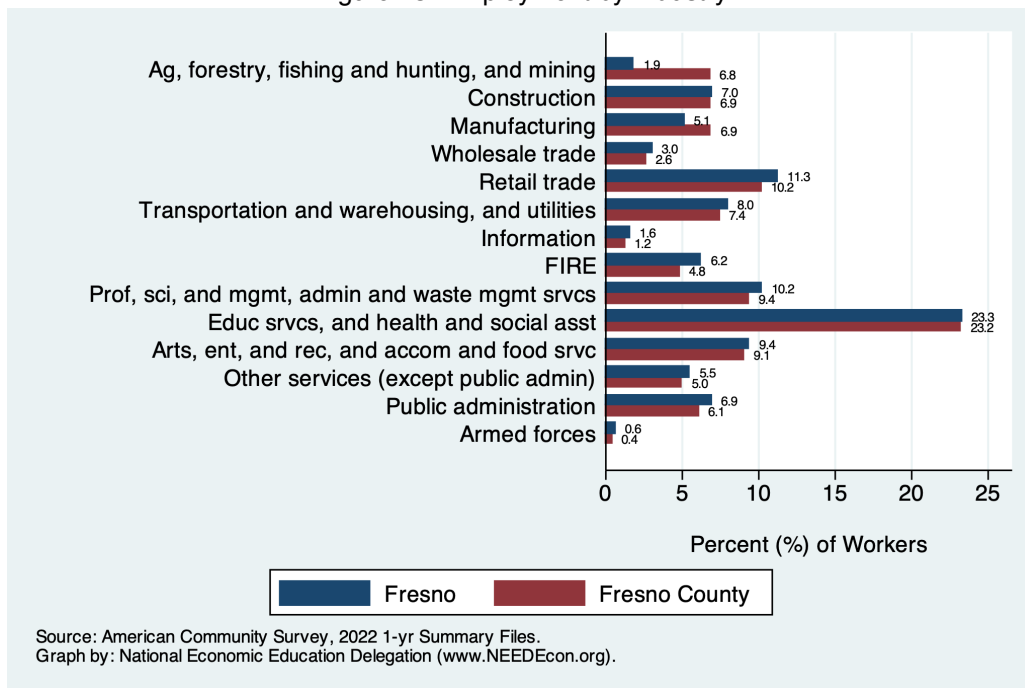
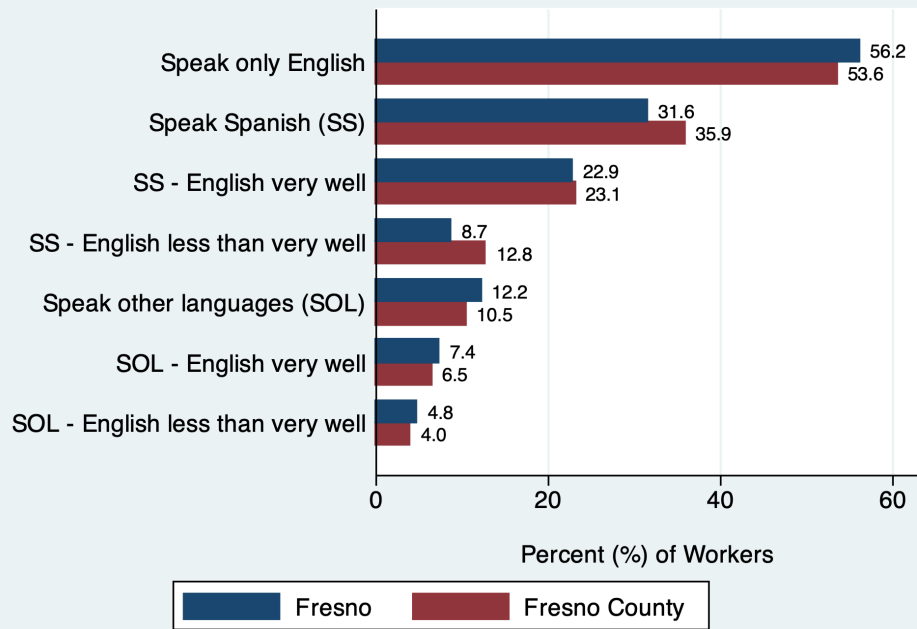
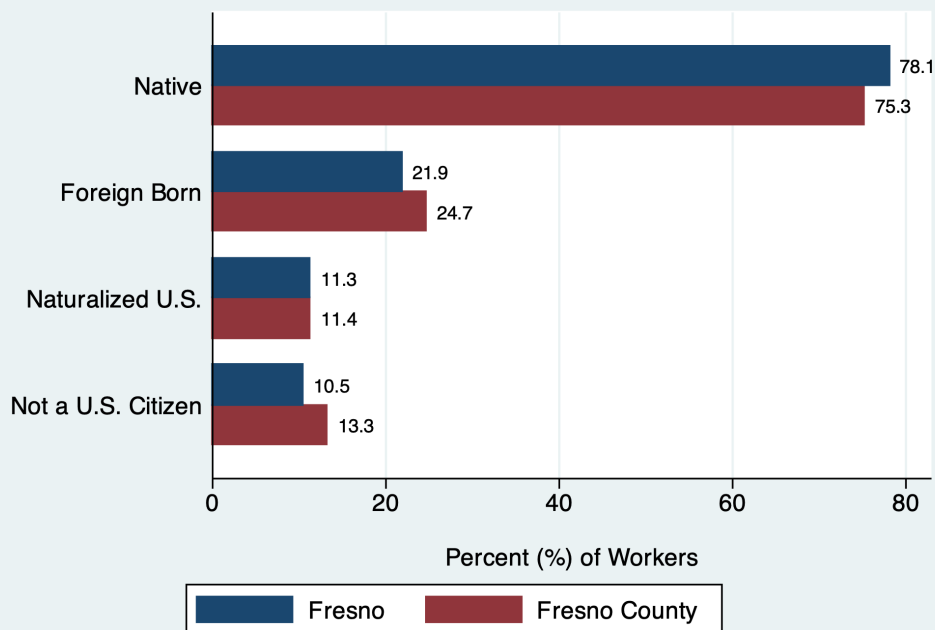


Figure 14: Language Spoken at Home



Source: American Community Survey, 2022 1-yr Summary Files.
 Graph by: National Economic Education Delegation (www.NEEDecon.org).

Figure 15: Citizenship



Source: American Community Survey, 2022 1-yr Summary Files.
 Graph by: National Economic Education Delegation (www.NEEDecon.org).

Employed Residents of Fresno

Figure 16: Employment by Occupation

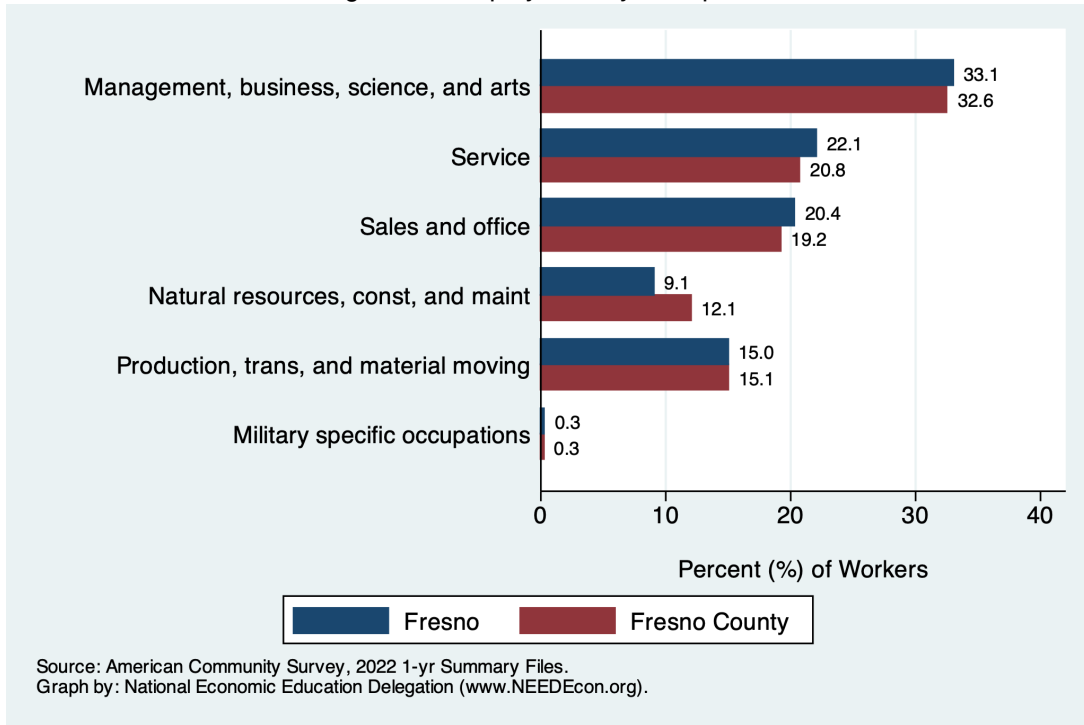


Figure 17: Employment by Industry

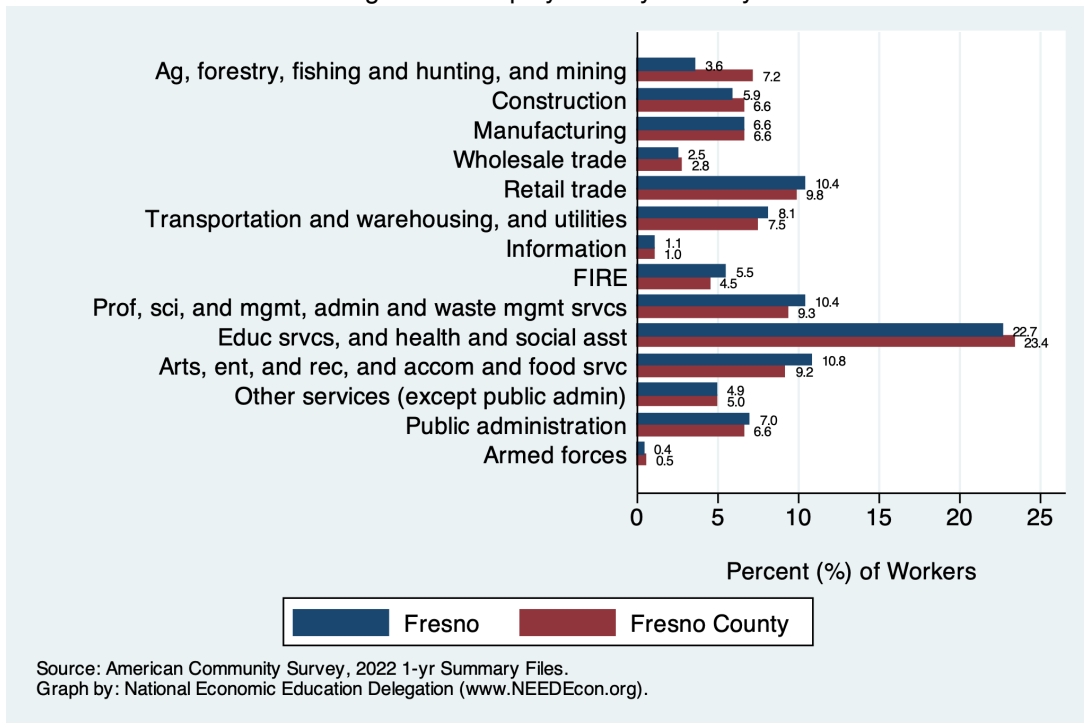


Figure 18: Language Spoken at Home

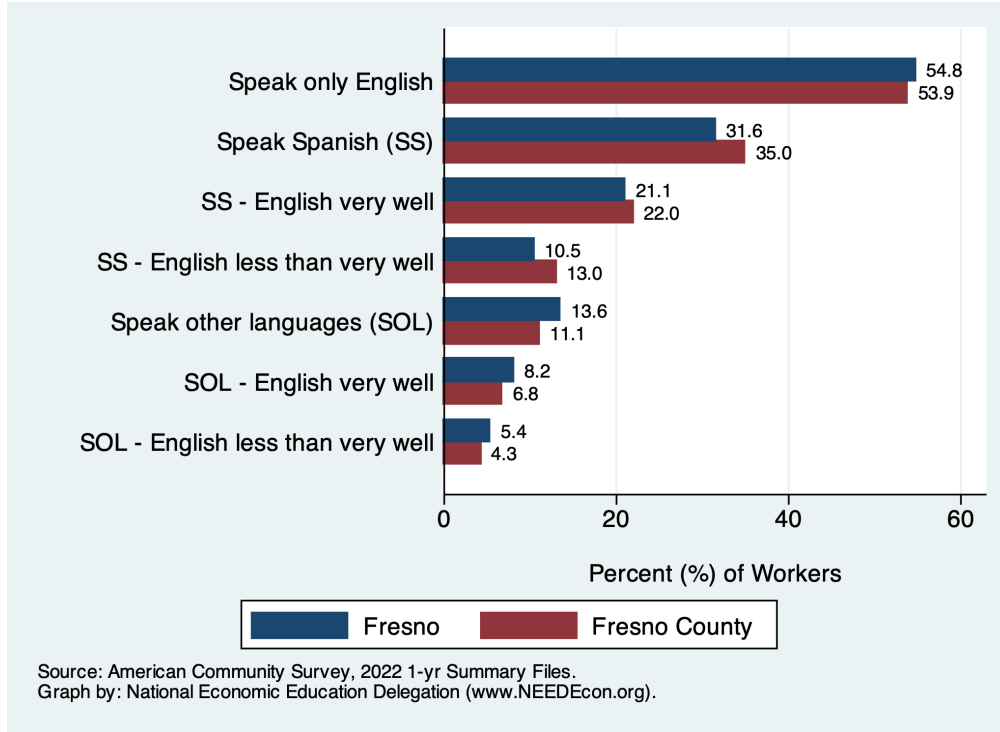
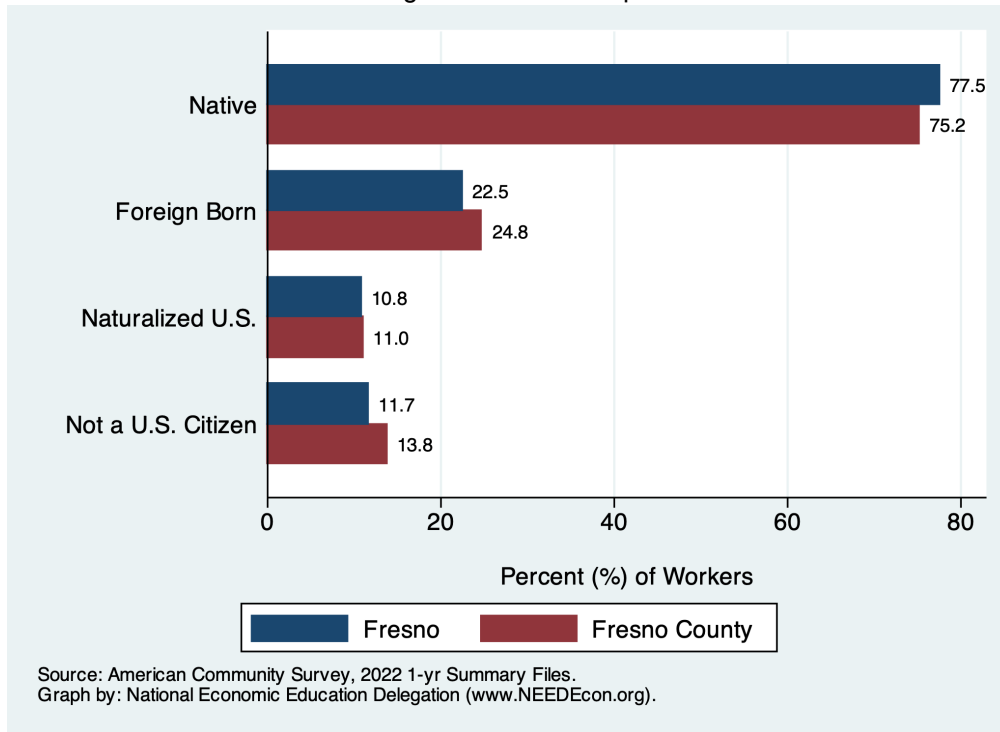


Figure 19: Citizenship



Employed Residents vs Workers in Fresno

Figure 20: Employment by Occupation

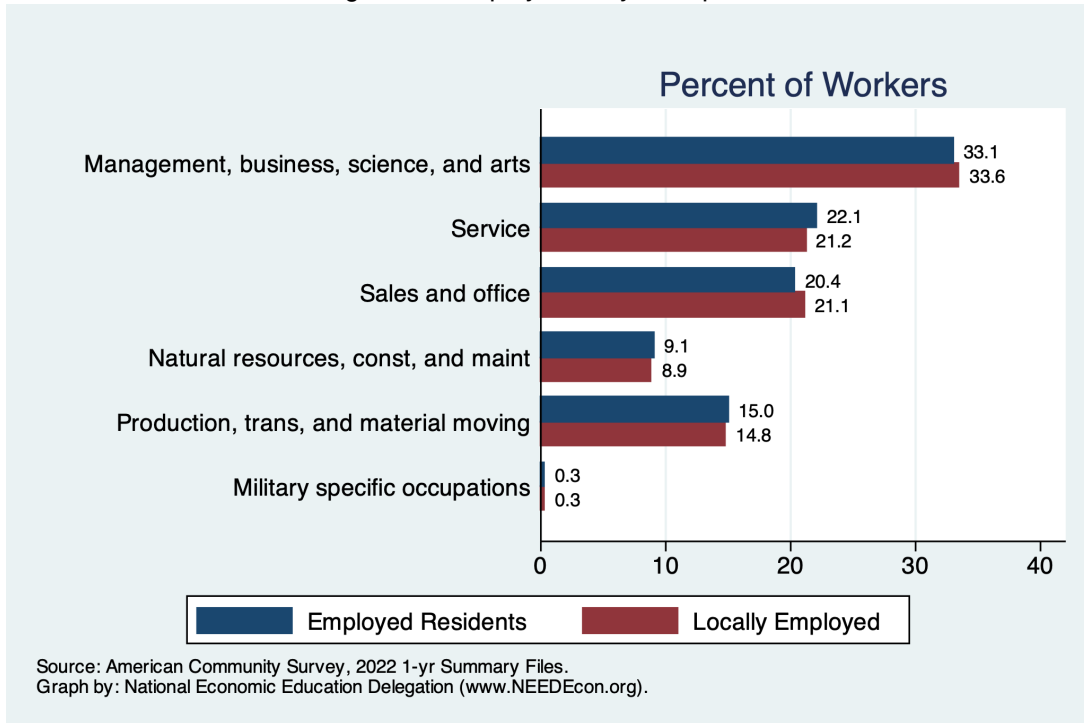


Figure 21: Employment by Industry

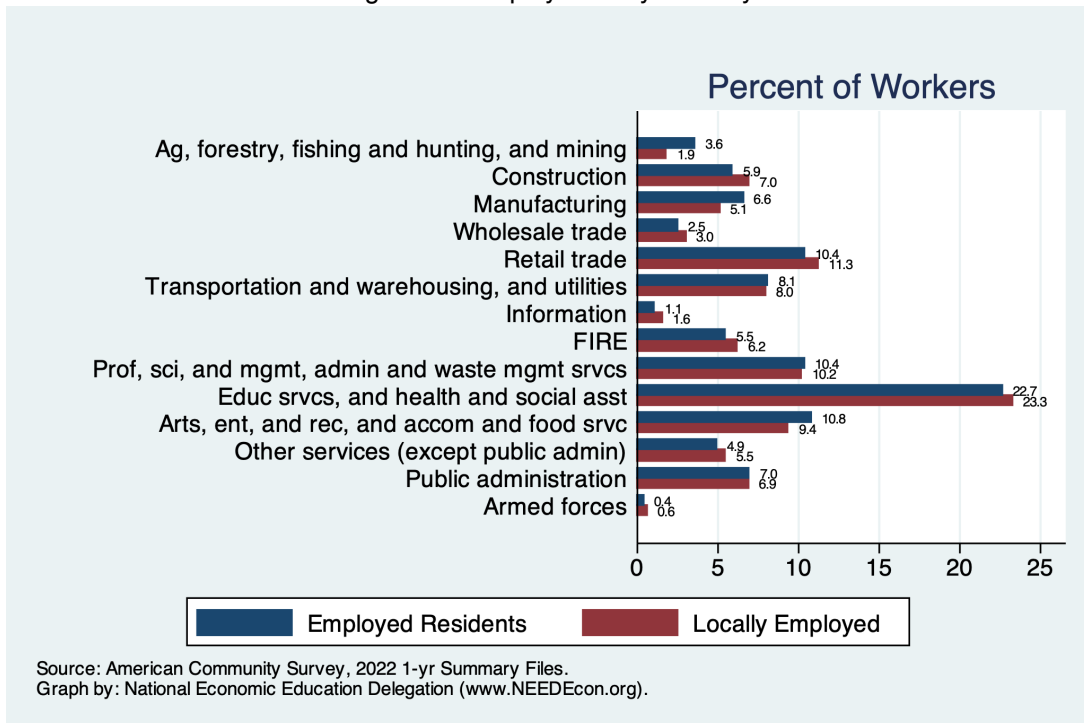


Figure 22: Language Spoken at Home

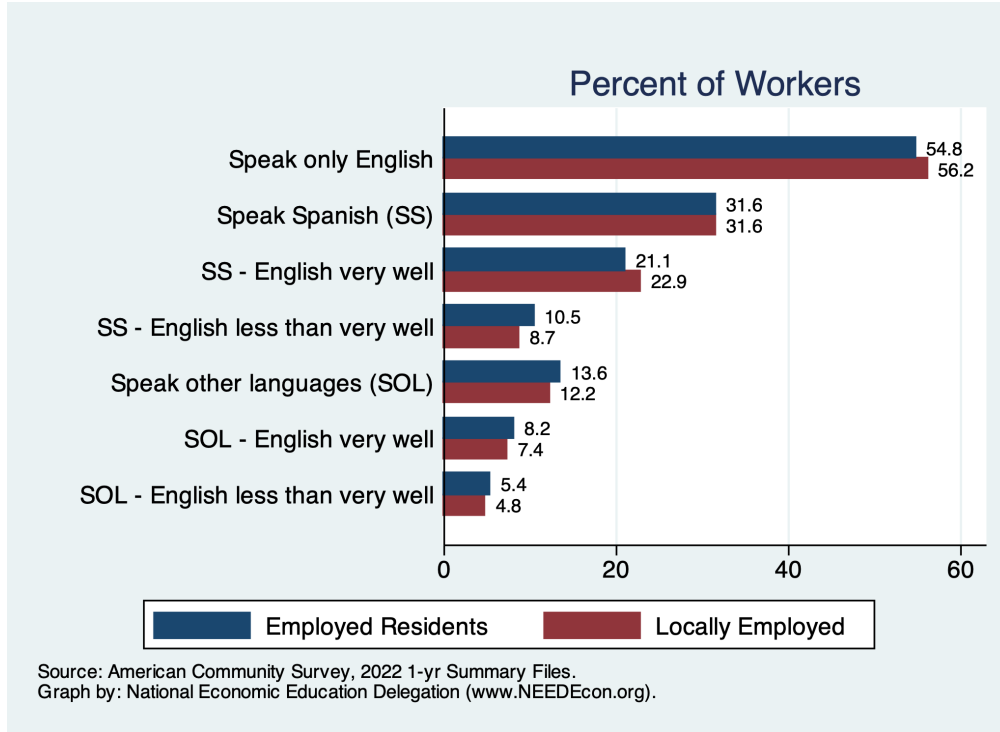
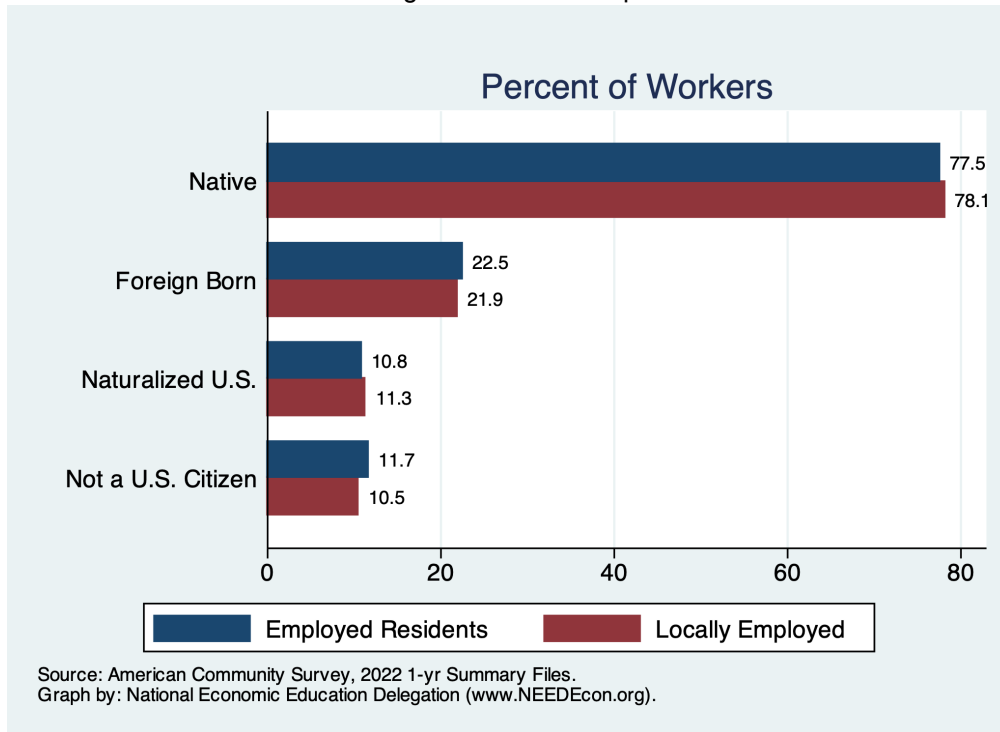


Figure 23: Citizenship



Income and Earnings

Per Capita Income Growth

Definition:

Per capita income is the average income per person in Fresno. Personal income is the income received by, or on behalf of, all persons from all sources: from participation as laborers in production, from owning a home or unincorporated business, from the ownership of financial assets, and from government and business

in the form of transfer receipts. Noncash government benefits are not included.

Why is it important?

Income is the money that is available to persons for consumption expenditures, taxes, interest payments, transfer payments to governments and the rest of the world, or for saving. As such, it is an important indicator of economic well-being in a community.

Figure 24: Real Per Capita Income Ranking Among California Cities

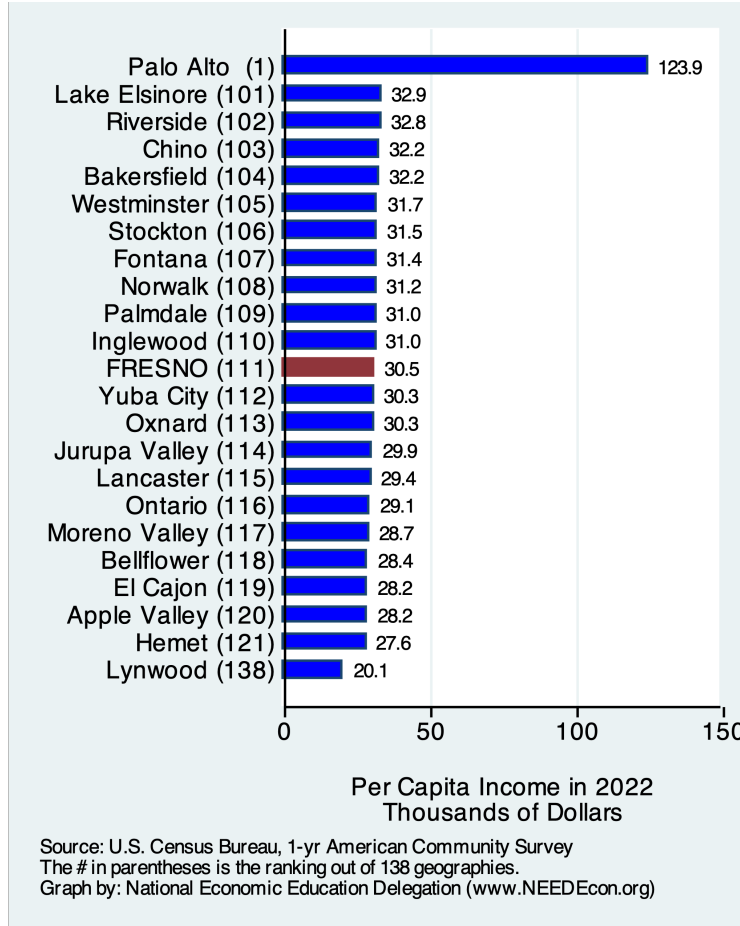
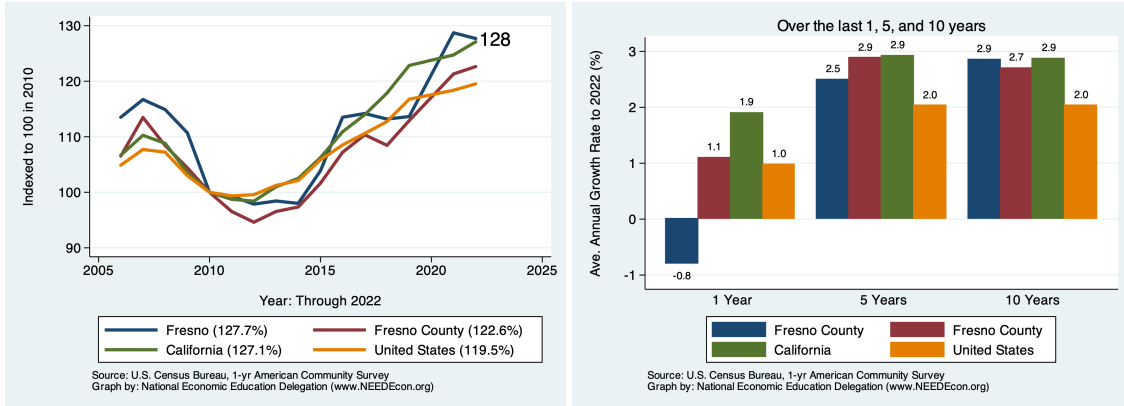


Figure 25: Regional Comparison of Growth over Time



Real Per Capita Income Ranking Among California Cities - w/Comparable Populations

Figure 26: Income Levels

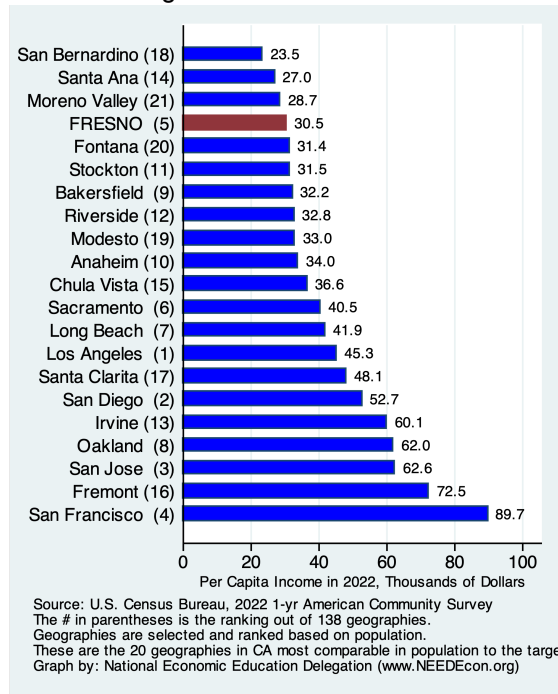
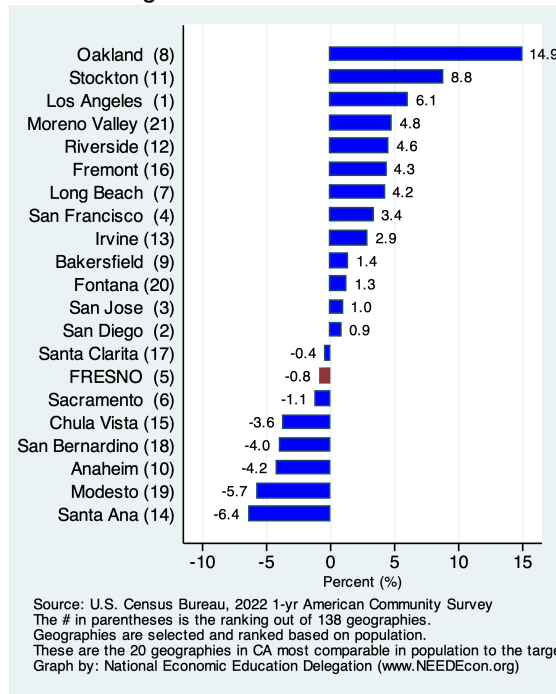


Figure 27: Growth over Time



Real Per Capita Income Ranking Among Cities in Fresno County

Figure 28: Income Levels

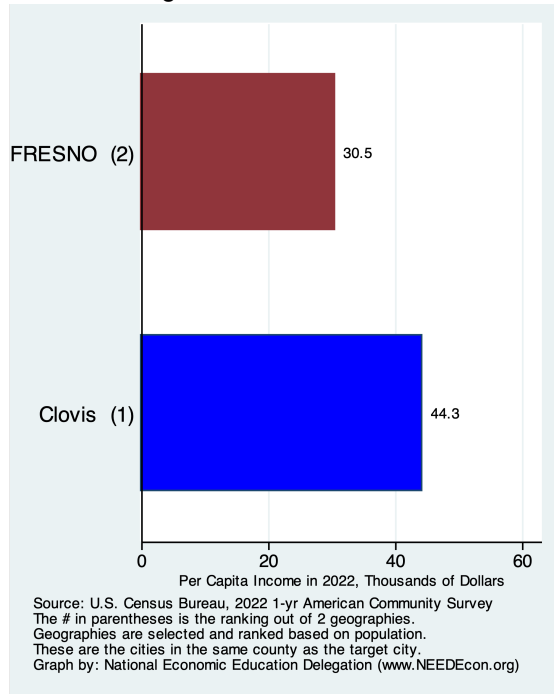


Figure 29: Growth over Time

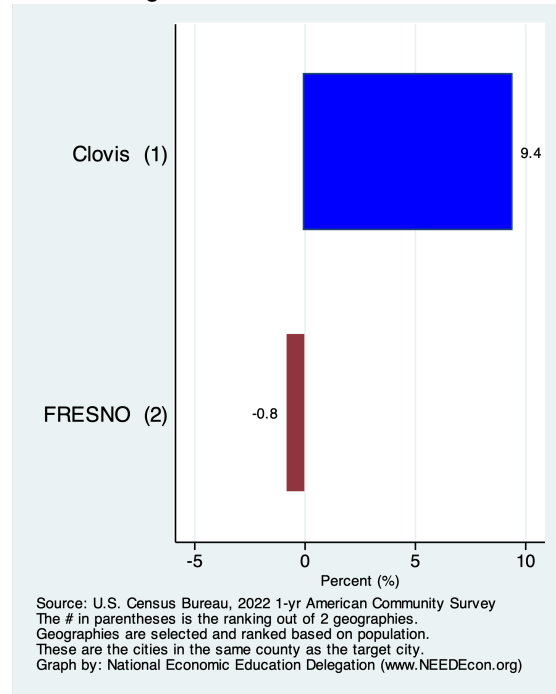
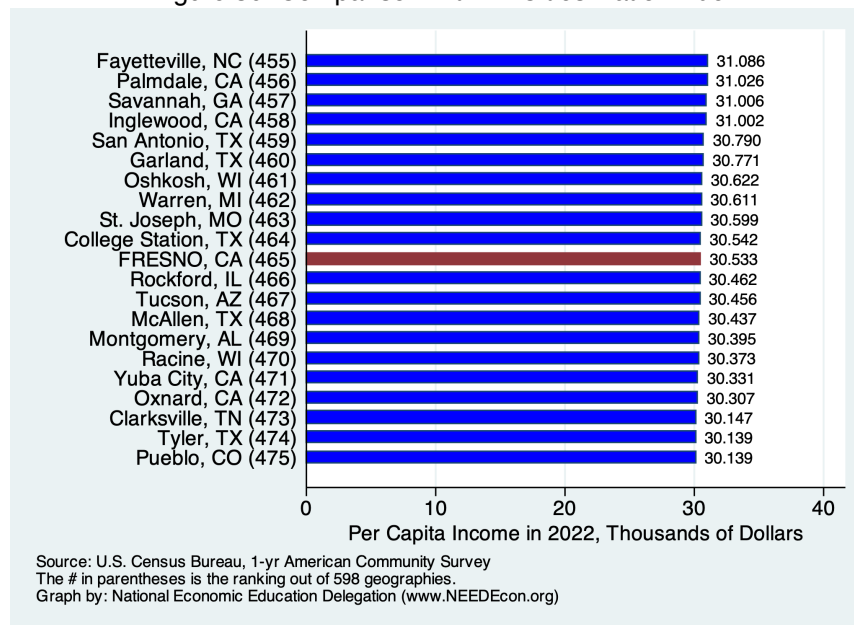


Figure 30: Comparison with All Cities Nationwide



Poverty and Inequality

Definition:

The local poverty rate provides an indication of the well-being of those at the bottom of the income distribution. The federal poverty rate measures the proportion of households in the region that are classified as living in poverty. Also included are measures of the extent to which the City's children are impoverished. Measures of the income distribution provide

further evidence on disparities in income in the region and how those disparities have changed over time.

Why is it important?

It is important to track measures of poverty and inequality to assess the extent of income disparities in the region, with an eye toward understanding how well the local economy is performing for all of its citizens.

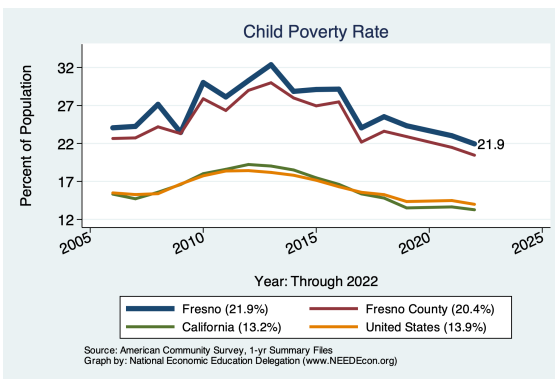
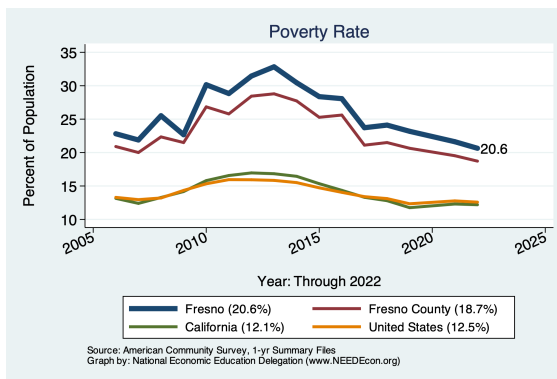


Figure 31: Inequality

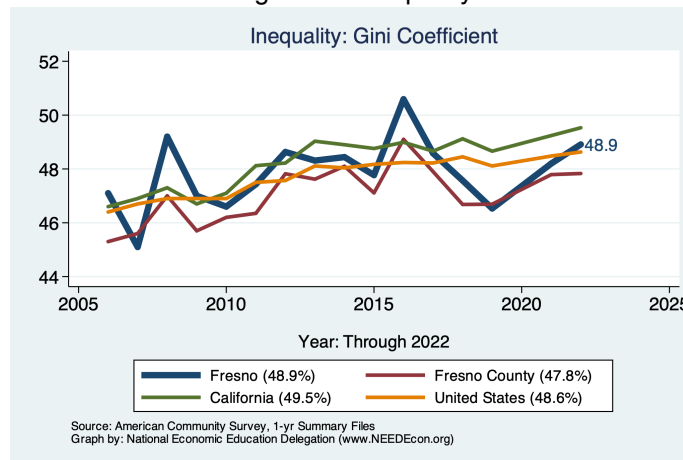


Figure 32: Shares Across the Income Distribution

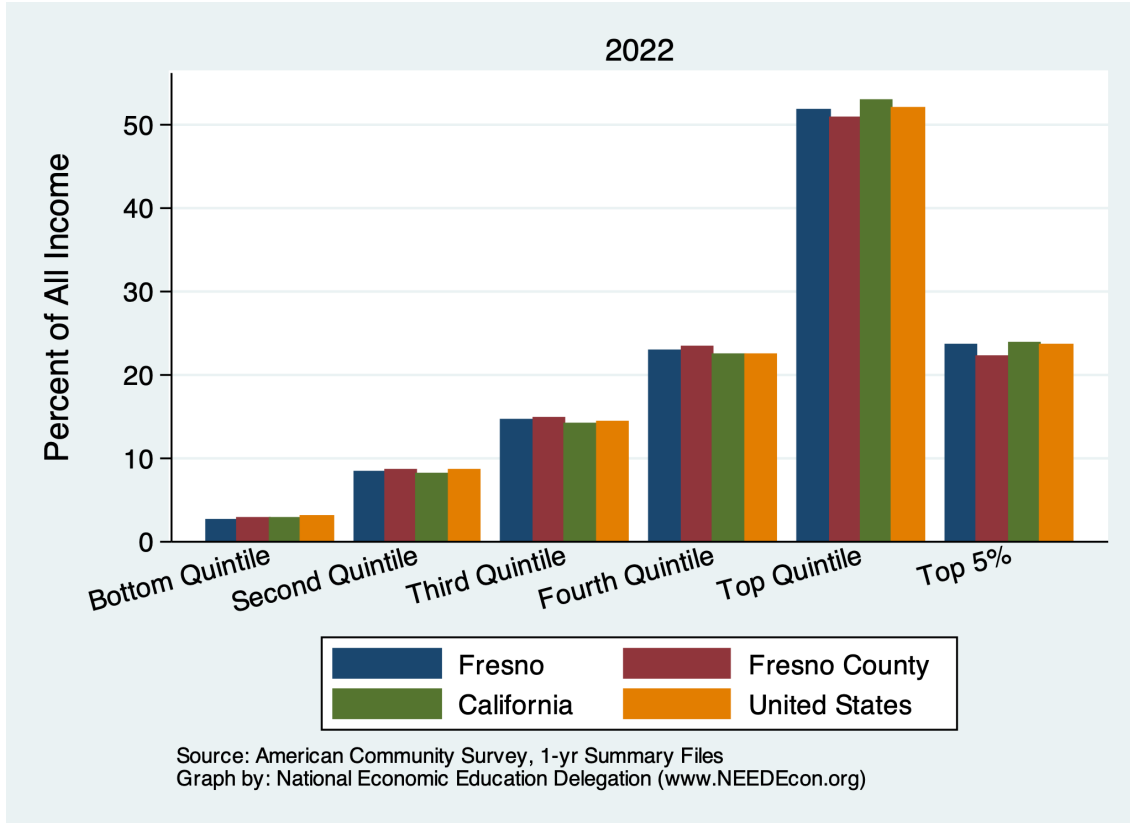
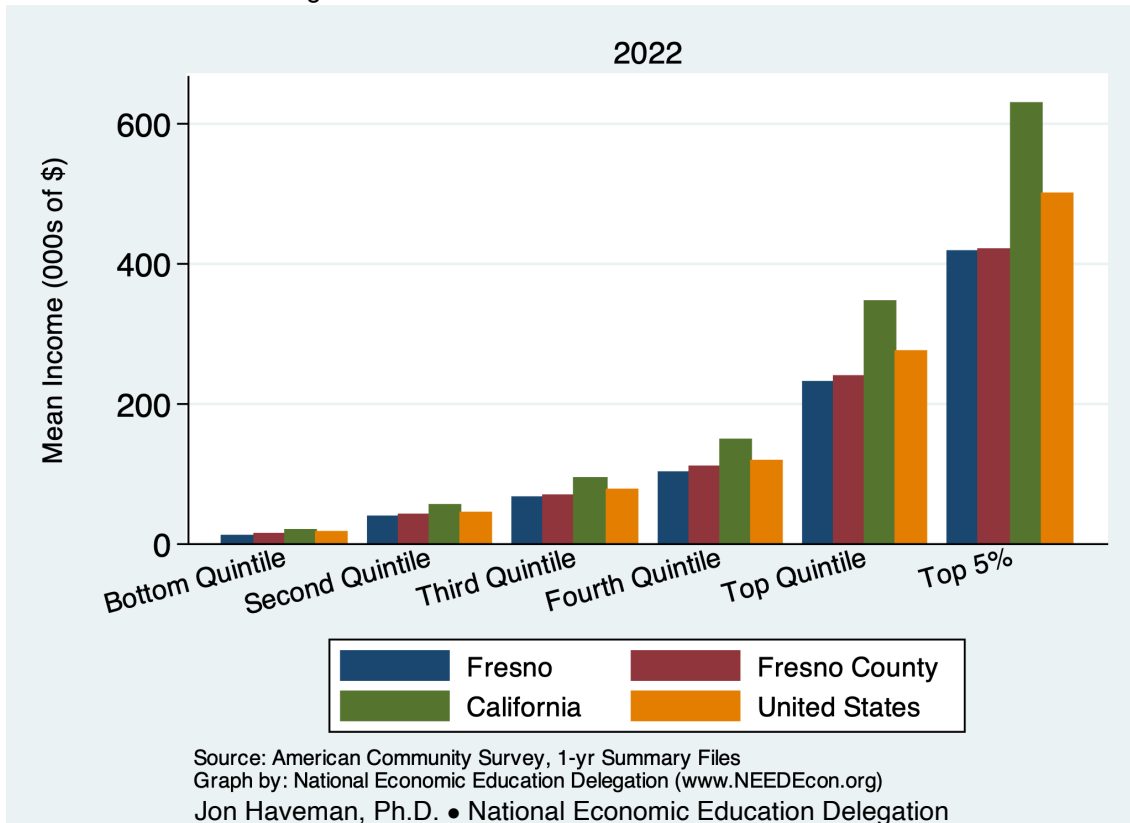


Figure 33: Means Across the Income Distribution



Housing

Housing Costs and Affordability

Definition:

Housing costs are measured in several different ways. First, we provide evidence on the evolution of median home prices, median rental price, and finally through evidence on the housing burden in the city and comparison regions. Housing burden is defined as a household needing to commit more than 30% of their household income toward housing costs. The median value is the amount in the middle. Fifty

percent of units are above the median and 50 percent are below.

Why is it important?

Housing is one of three fundamental necessities, along with food and clothing. A measure of the cost of housing is an integral part of the measurement of the cost of living in a specific community. This is particularly true in cities and regions throughout the Bay Area, where housing costs are high relative to income.

Cost of Housing in Fresno and Broader Regions

Figure 34: Median Home Prices

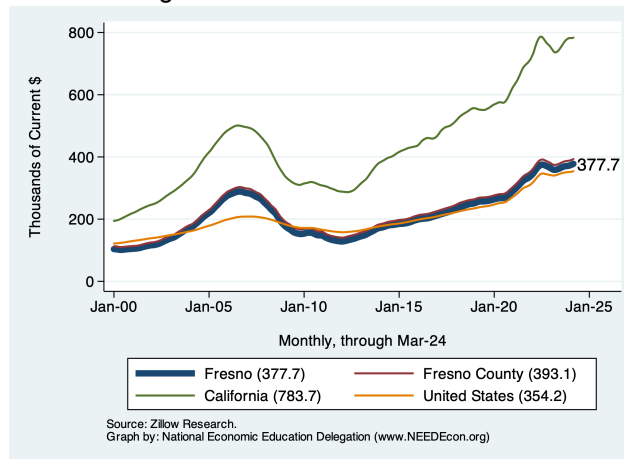
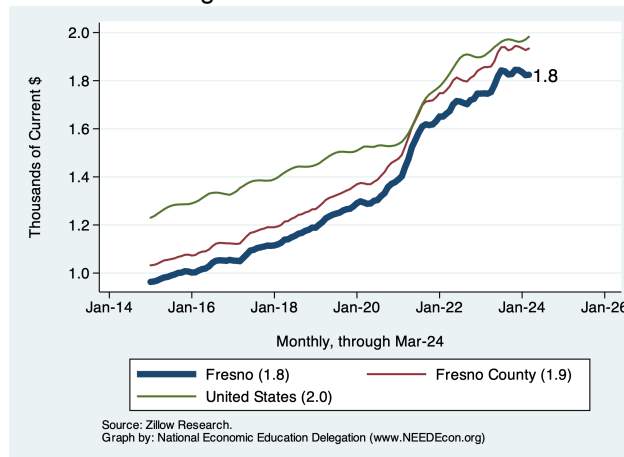


Figure 35: Median Rents



Housing Ownership in Fresno and Broader Regions

Figure 36: Home Ownership Rates

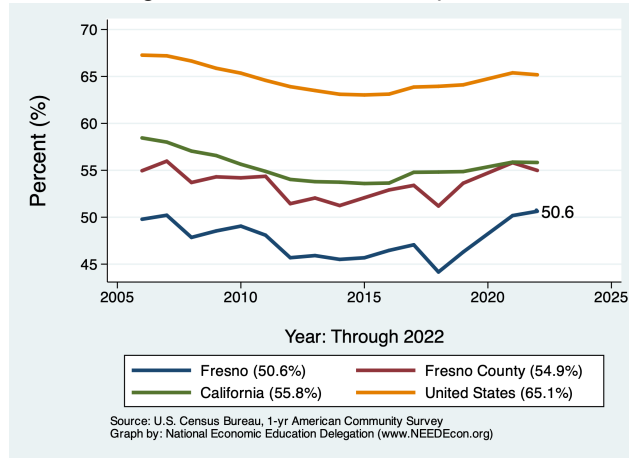


Figure 37: Home Ownership by Age

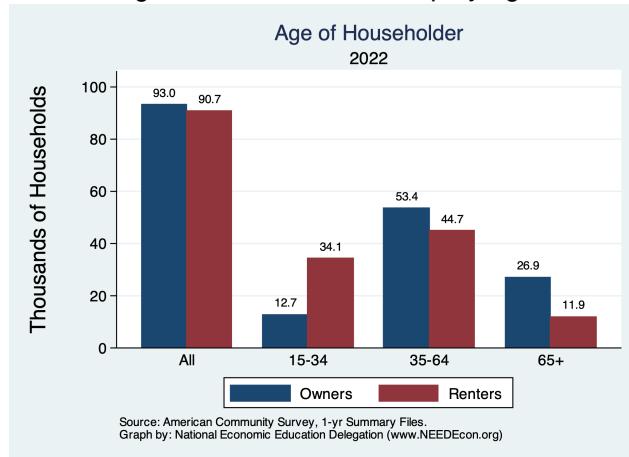


Figure 38: Income by Tenure

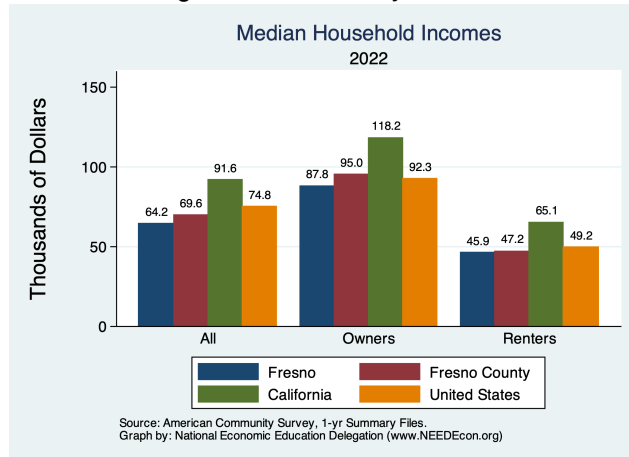


Figure 39: Income Distribution by Tenure

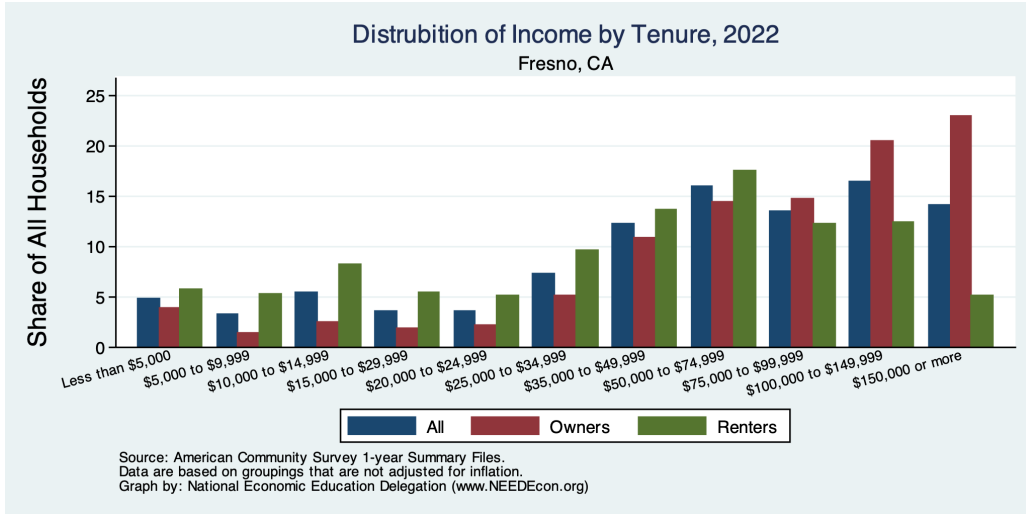


Figure 40: Income Distribution of Home Owners

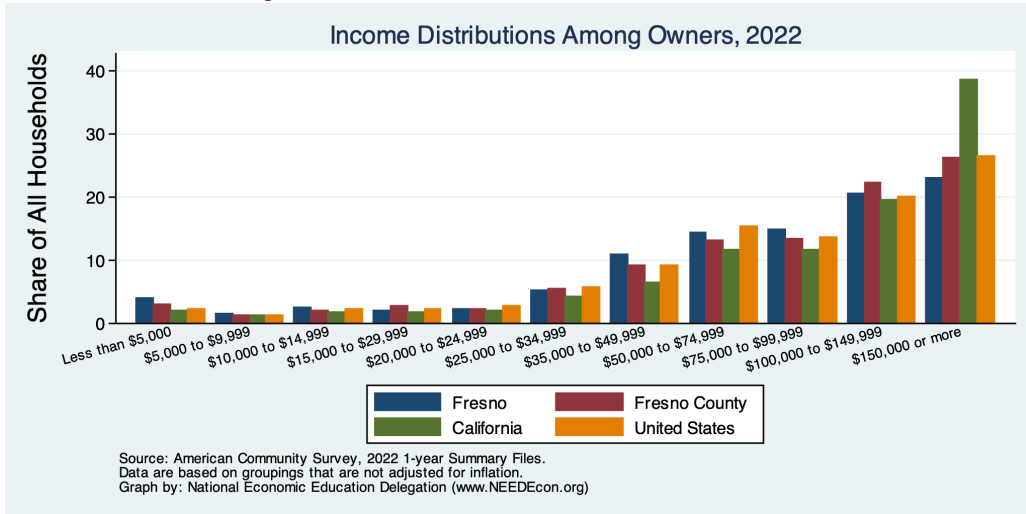
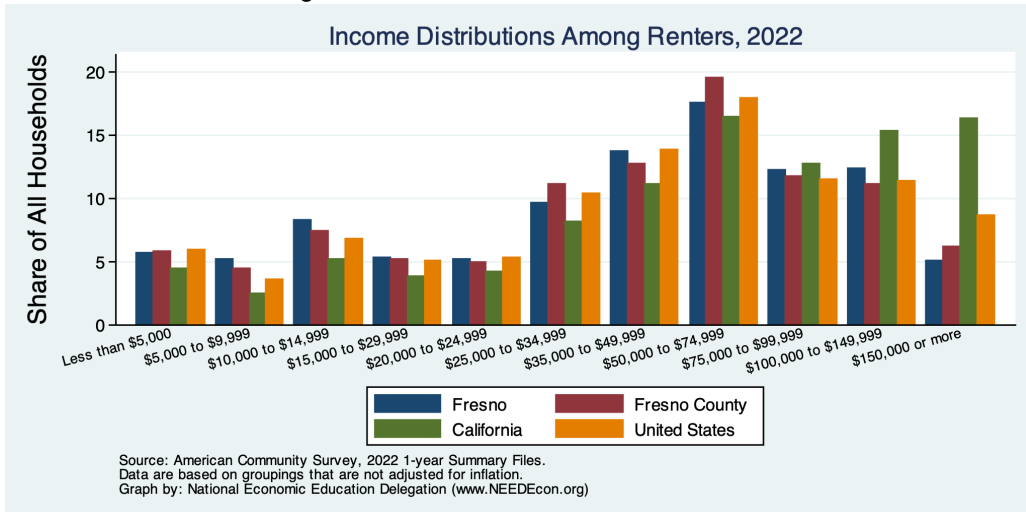


Figure 41: Income Distribution of Renters



Housing Burden in Fresno and Broader Regions

Figure 42: Home Owners w/ A Mortgage

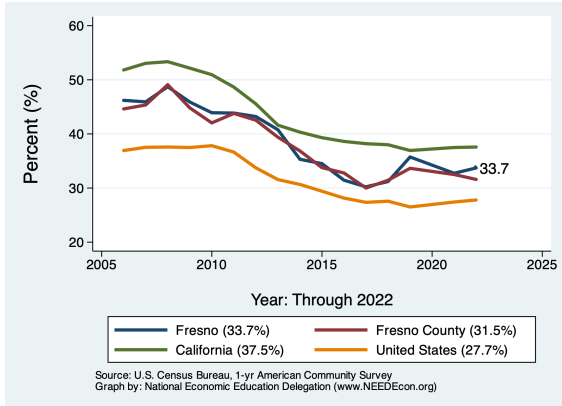


Figure 43: Home Owners w/o A Mortgage

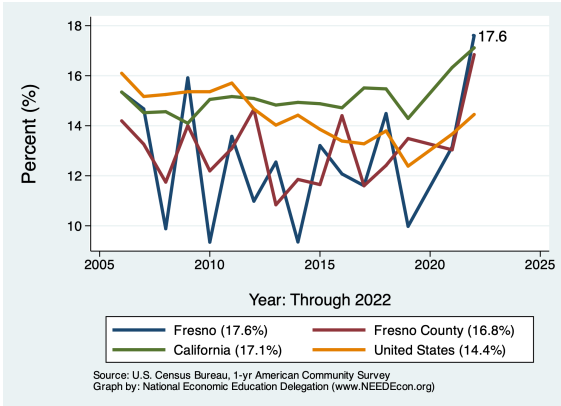


Figure 44: Renters

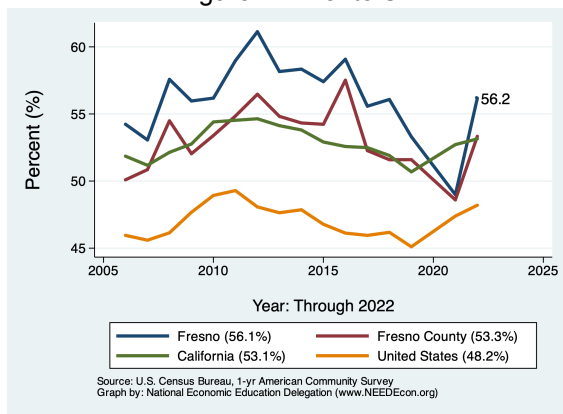
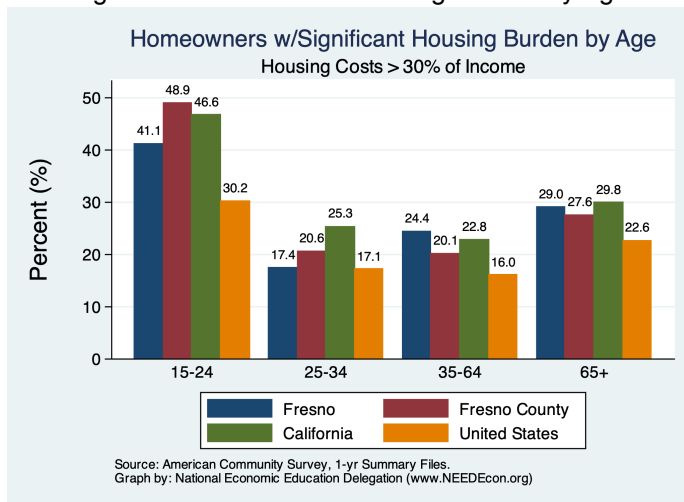


Figure 45: Homeowner Housing Burden by Age



Housing Picture

Definition:

Housing costs are measured in several different ways. First, we provide evidence on the evolution of median home prices, median rental price, and finally through evidence on the housing burden in the city and comparison regions. The median value is the amount in the middle. Fifty percent of units are above the median and 50 percent are below.

Why is it important?

In areas where the rate of population growth exceeds the rate of housing growth, this is likely to reflect a tightening housing market. A tightening housing market will also likely be reflected in lower vacancy rates and higher occupancy rates. It may also be reflected in higher numbers of people per household.

Table 5. Housing Market Indicators

Indicator	2023	2019	2010	% Change from	
				2019	2010
Total Population	543,428.0	542,012.0	494,665.0	0.3	9.9
Total # of Homes	188,541.0	180,632.0	171,288.0	4.4	10.1
# Occupied Units	180,065.0	170,749.0	158,349.0	5.5	13.7
Persons per Household	3.0	3.1	3.1	-5.0	-3.5
Vacancy Rate (%)	4.5	5.5	7.6	-17.8	-40.5

Source: CA DOF; Calculations by the National Economic Education Delegation

Figure 46: Housing Growth

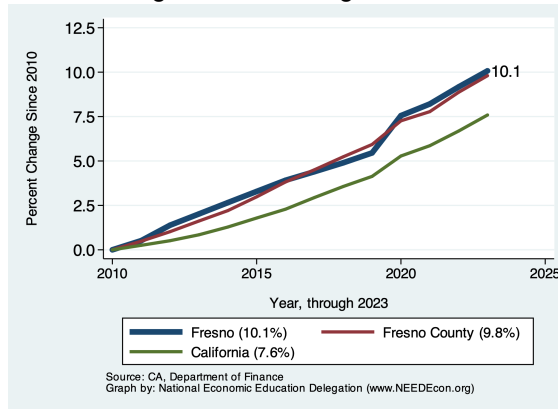


Figure 47: Persons per Household

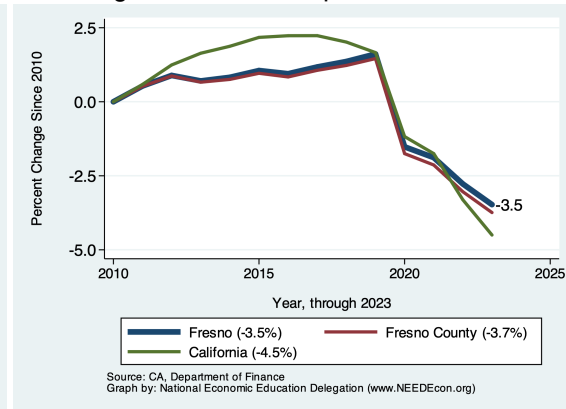


Figure 48: Vacancy Rates

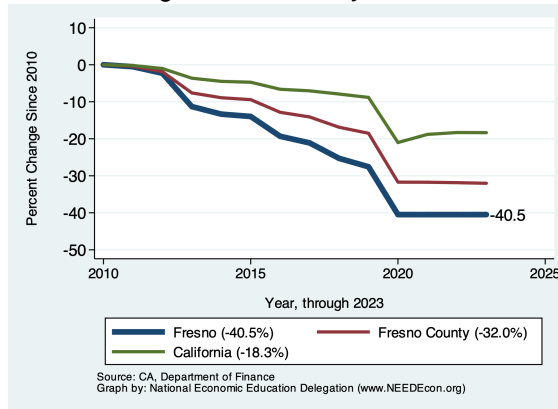
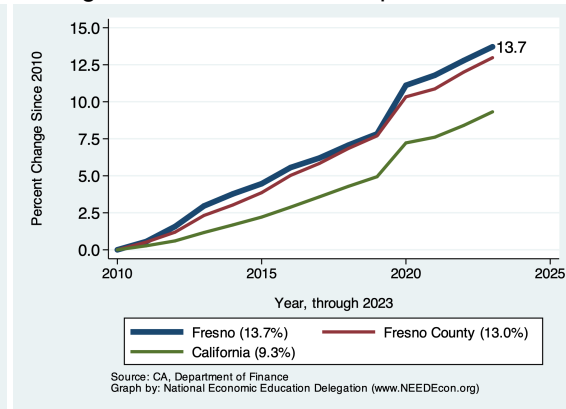


Figure 49: Number of Occupanied Units



Trends in the Growth of Housing by Housing Type

Figure 50: Single Detached Homes

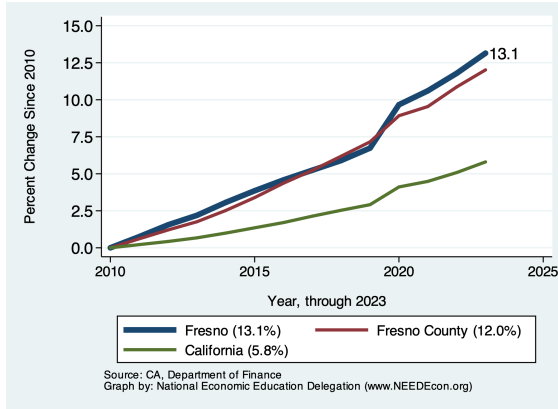


Figure 51: Single Attached Homes

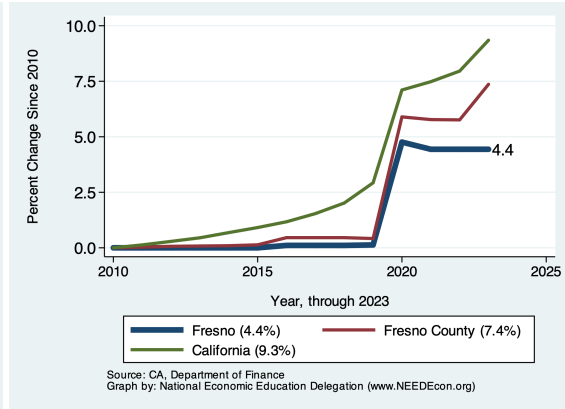


Figure 52: Housing in Buildings with Two to Four Units

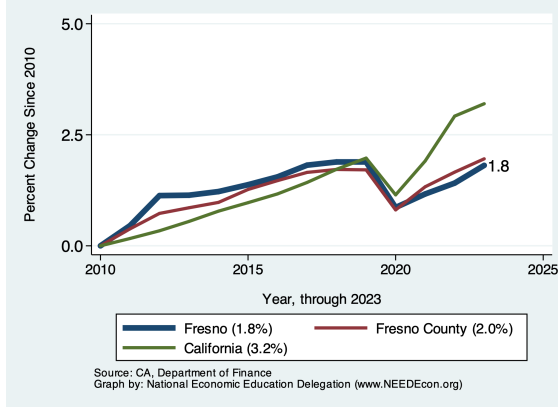
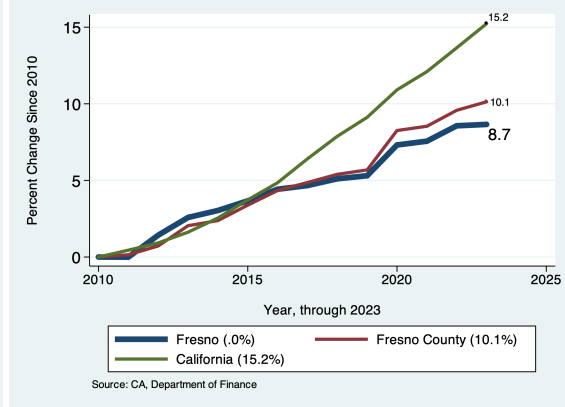


Figure 53: Housing in Buildings with Five or More Units



Vintage of Residential Housing

Why is it important?

This section provides evidence on the year in which residential housing in Fresno was built. We break it down into owned versus rented residences and provide a comparison across Fresno County and broader regions. A sense of the age of housing in a region provides an indication of the urgency with which a region might pursue additional housing. As the hous-

ing stock ages, an urgency with which renovations and rebuilds are permitted might result. All things equal, more recently constructed housing will be more likely to meet current codes and standards. Remodeling of existing units will be more desirable when existing units are, on average, older.

Figure 54: Distribution of Housing Construction

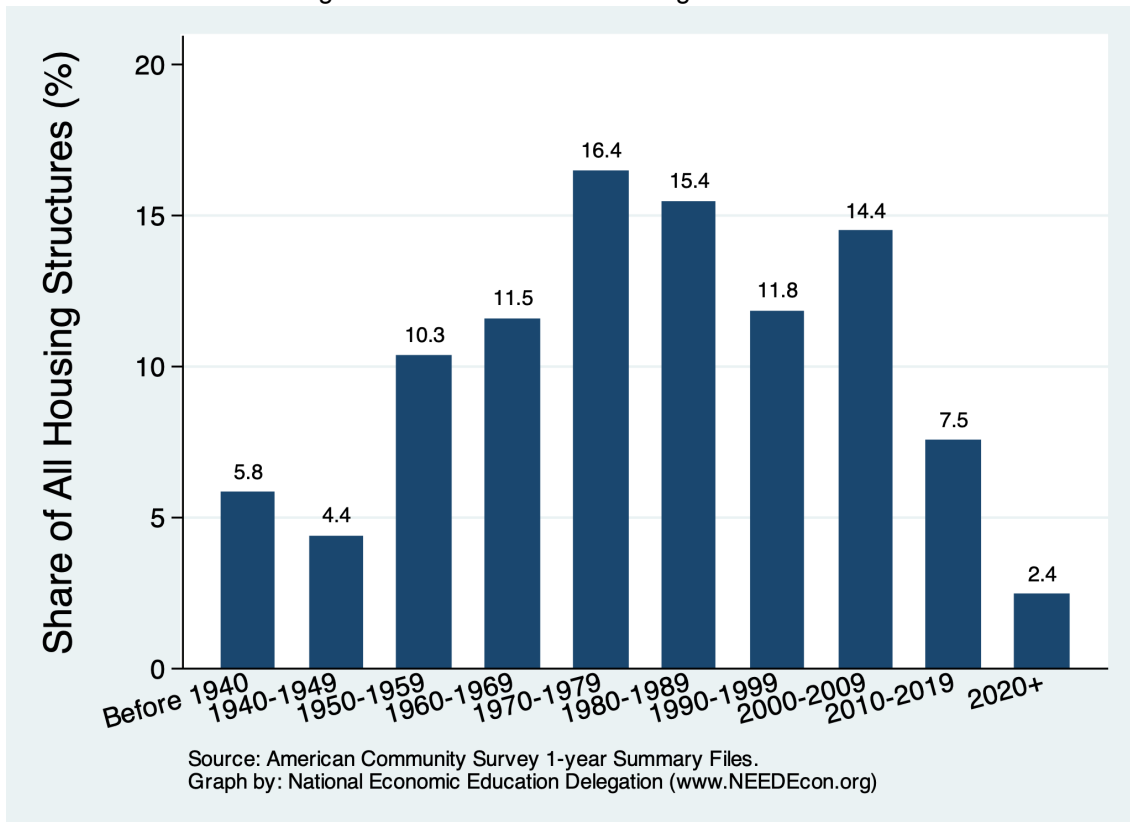


Figure 55: Housing Vintage across Regions

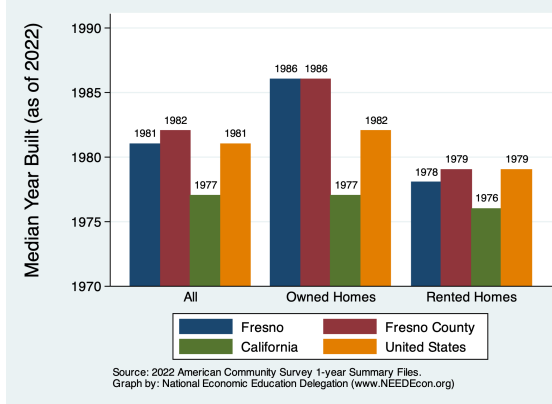


Figure 56: Housing Vintage by Tenure

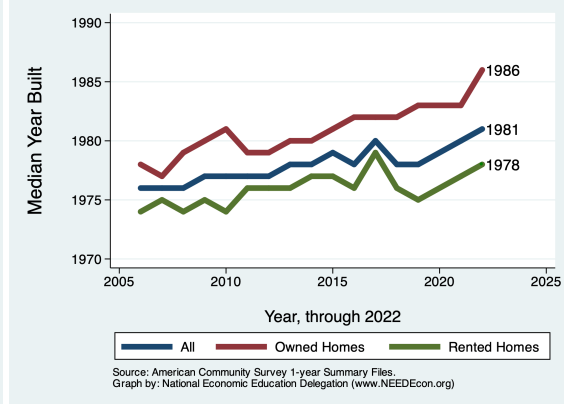


Figure 57: Vintage of Owned Residences

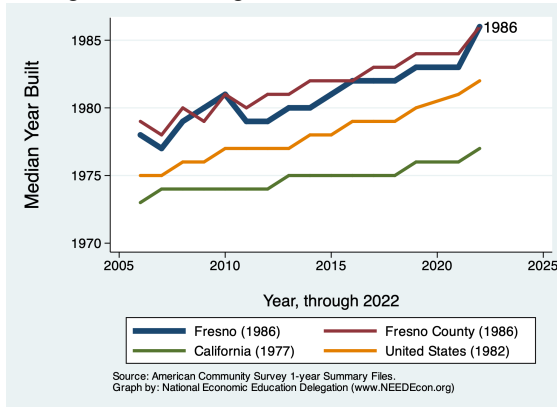


Figure 58: Vintage of Rented Residences

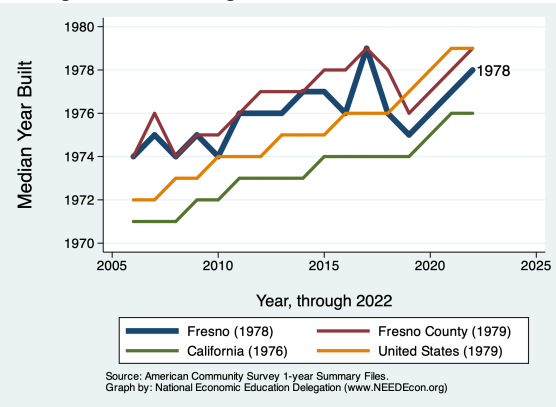
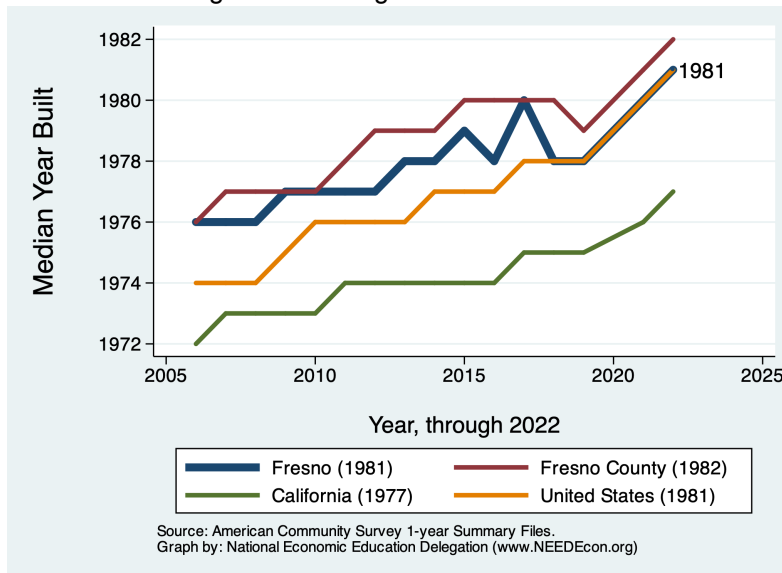


Figure 59: Vintage of All Residences



Occupation of Residential Housing

Why is it important?

The duration of residence in a city is important for developing future policies regarding growing the local population. If a region is highly mobile, evidenced by most residences having

been recently occupied, a city might propose policies to reduce that mobility, or ask why the mobility happens. Policies could be put in place to either reduce or increase migration.

Figure 60: Year Current Occupant Moved In

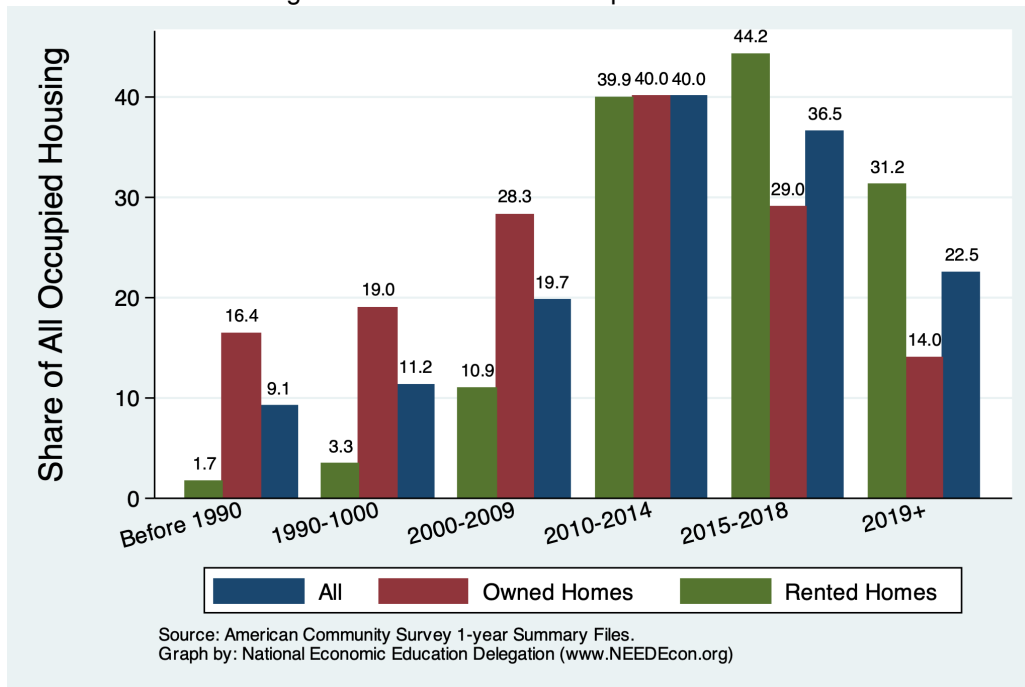


Figure 61: Year Occupied by Current Residents across Regions

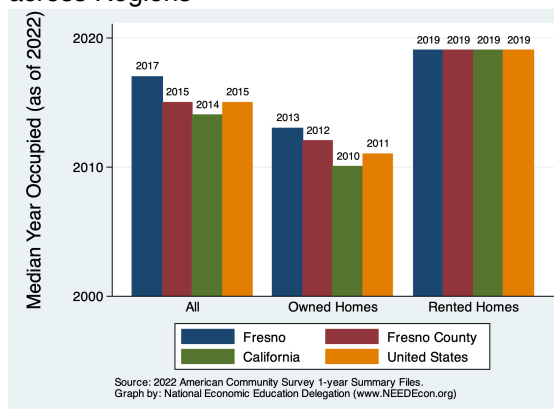


Figure 62: Year Occupied by Current Residents by Tenure

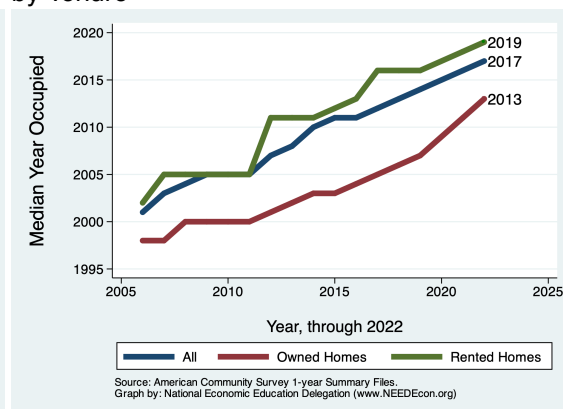


Figure 63: Year Occupied by Current Residents for Owned Housing

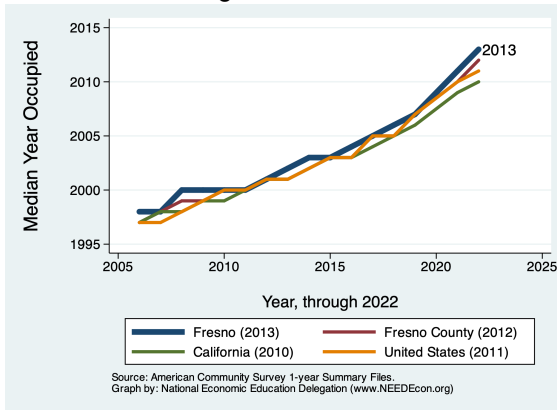


Figure 64: Year Occupied by Current Residents for Rented Housing

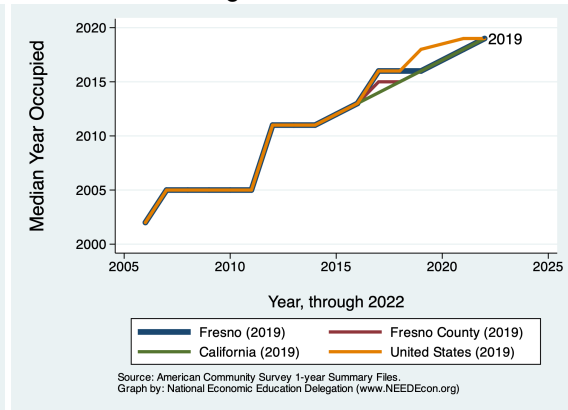
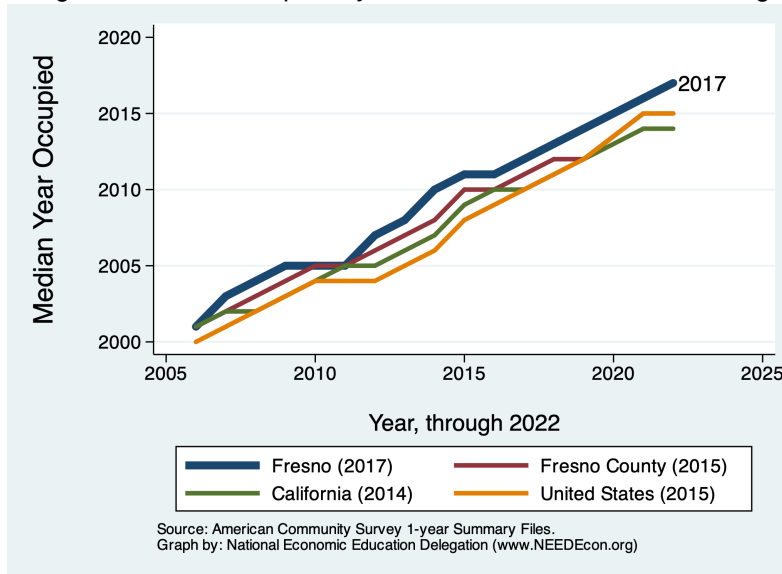


Figure 65: Year Occupied by Current Residents for All Housing



Residential Permitting

Definition:

This indicator provides evidence on the number of residential buildings that are permitted for construction each year. Permit data for Fresno is compared with data from Fresno County as a whole and broader regions. The statistic provided scales the number of permits by population. This is done to facilitate comparisons across regions.

Why is it important?

Building permits are the best indicator available of new units coming on the market. In order for a region's population to grow and flourish, new residential properties must be added to the existing stock. Building, both in the City and in the County more generally, is an indication of the extent to which new residences accommodate new residents or are affecting prices through increased supply.

Fresno - Ranking Among Comparables

Figure 66: Number of Units Permitted - Nationwide Comparables (Rank)

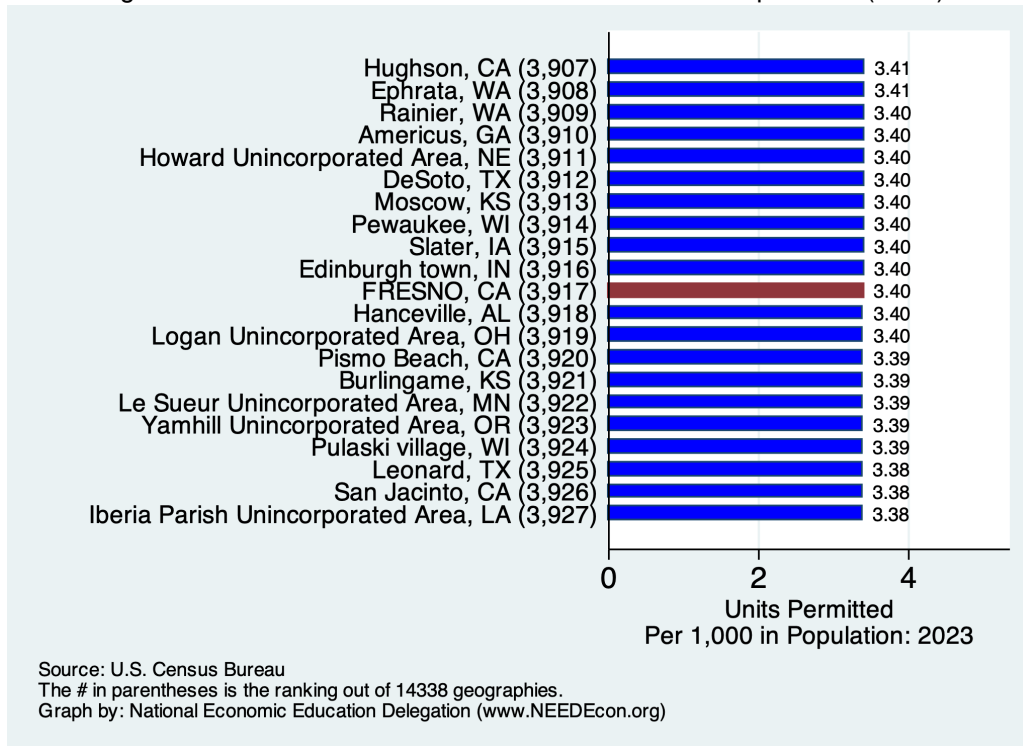
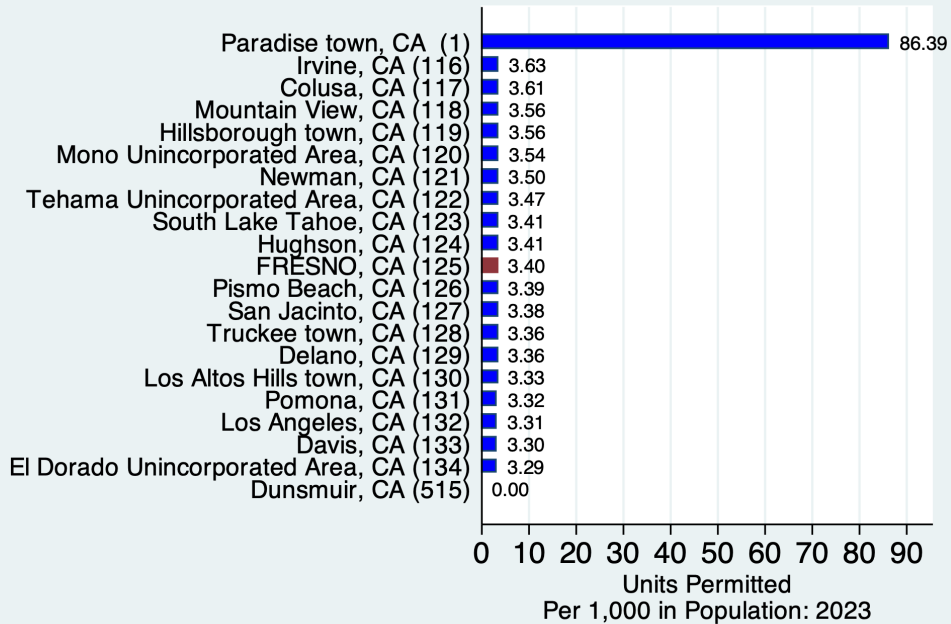
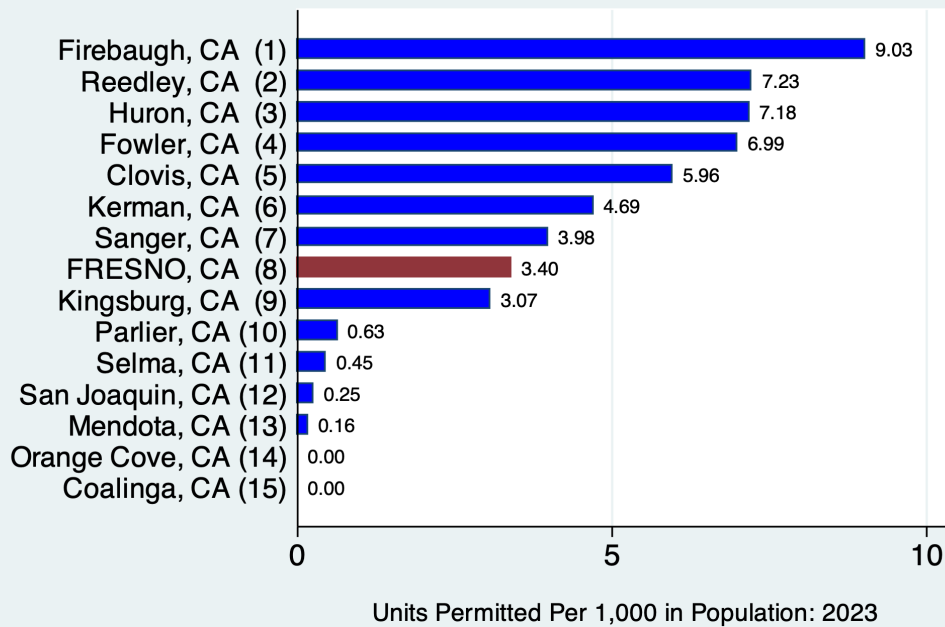


Figure 67: Number of Units Permitted - California Comparables (Rank)



Source: U.S. Census Bureau.
 The # in parentheses is the ranking out of 515 geographies.
 Graph by: National Economic Education Delegation (www.NEEDecon.org)

Figure 68: Number of Units Permitted - Cities in Fresno County (Rank)



Source: U.S. Census Bureau,
 The # in parentheses is the ranking out of 15 geographies.
 Graph by: National Economic Education Delegation (www.NEEDecon.org)

Fresno - Permitting Activity

Annual Units Permitted - Per Capita in Fresno

Figure 69: Units Permitted Each Year

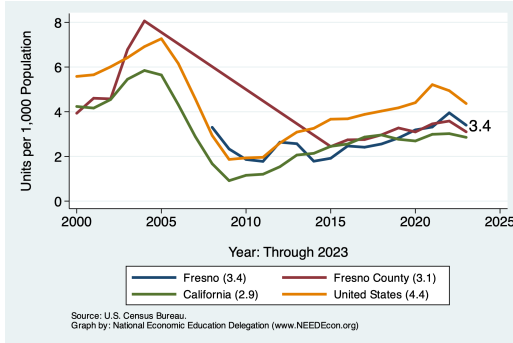
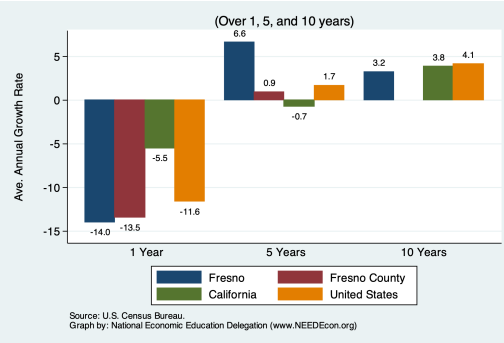


Figure 70: Average Annual Growth in Units Permitted



Annual Number of Buildings Permitted - Per Capita in Fresno

Figure 71: Units Permitted Each Year

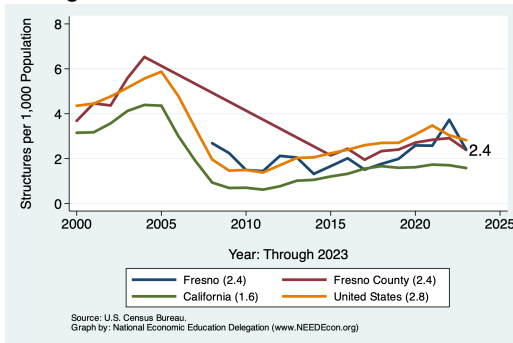
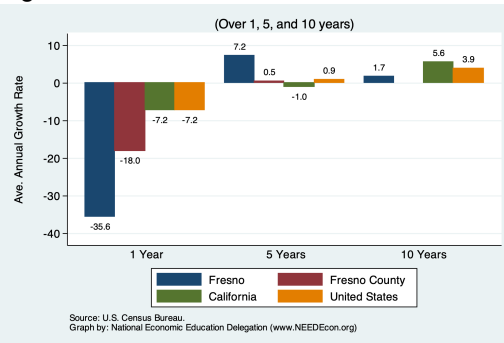


Figure 72: Average Annual Growth in Buildings Permitted



Annual Value of Property Permitted - Per Capita in Fresno

Figure 73: Value Permitted Each Year

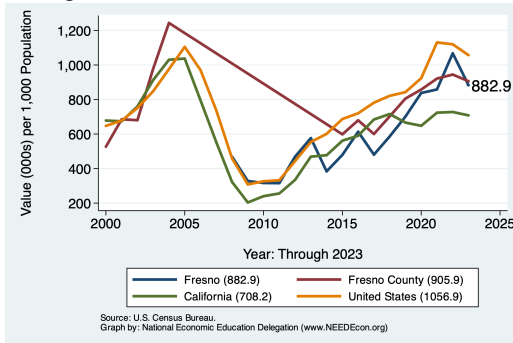
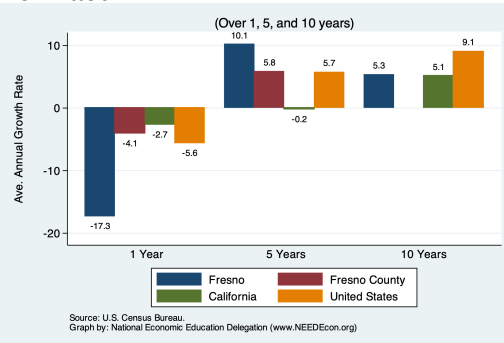


Figure 74: Average Annual Growth in Value Permitted



Commute Patterns

During the recovery from the Great Recession, the period from 2010 to 2019, the Bay Area economy, and Silicon Valley in particular, has been growing at a pace roughly double that of the state as a whole and triple that of the nation. This growth has precipitated a tight hous-

ing market and also brought about some significant changes in commute patterns, many of which have been reversed by the pandemic. Recent years have seen significant changes in both the mode of transportation and commute times.

Mode of Transportation

Figure 75: Percent of Workers Commuting by Car Alone

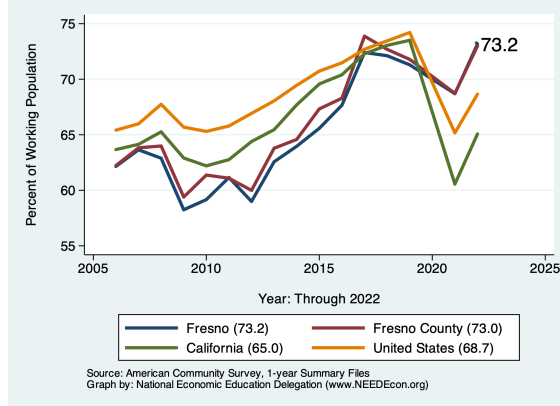


Figure 76: Percent of Workers Commuting by Carpool

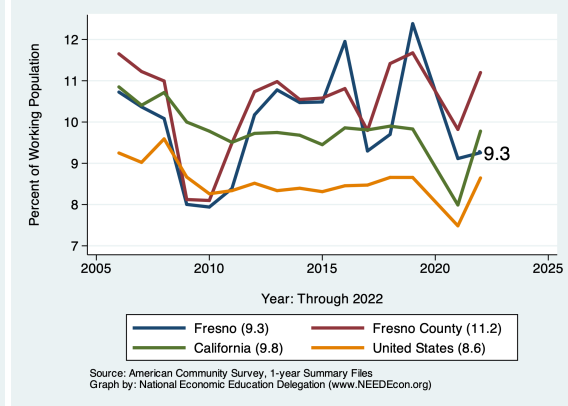


Figure 77: Percent of Workers using Public Transportation

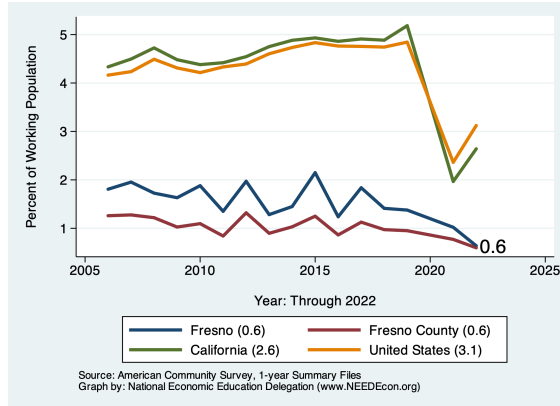
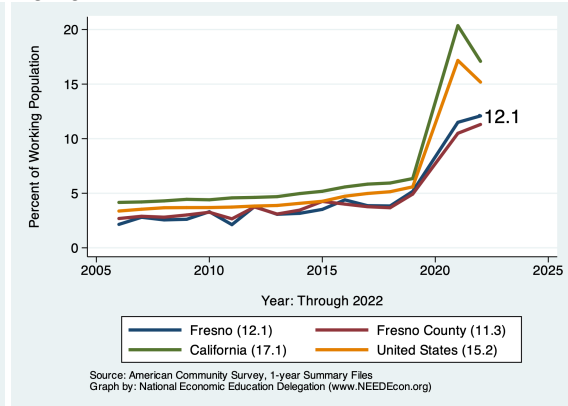


Figure 78: Percent of Workers Who Work From Home



The first table on this page presents data for those who LIVE in Fresno. The second provides data on those who work, but do not necessarily live in Fresno. The final two columns provide for a comparison of commute mode choices of people locally with those in California more broadly.

Table 6. SEX OF WORKERS BY MODE OF TRANSPORTATION TO WORK

Mode of Transit	Male		Female		All Workers		All of CA (%)
	#	(%)	#	(%)	#	(%)	
Car, Truck, or Van:	106,822	83.6	87,708	81.1	194,530	82.4	75.3
Drove Alone	96,657	75.6	76,027	70.3	172,684	73.2	65.5
Carpooled:	10,165	8.0	11,681	10.8	21,846	9.3	9.8
In 2-person carpool	4,688	3.7	8,012	7.4	12,700	5.4	7.0
In 3-person carpool	3,182	2.5	1,427	1.3	4,609	2.0	1.7
In 4-or-more-person carpool	2,295	1.8	2,242	2.1	4,537	1.9	1.2
Public Transportation (excl Taxi):	767	0.6	739	0.7	1,506	0.6	2.7
Bus or Trolley Bus	767	0.6	739	0.7	1,506	0.6	1.8
Streetcar or Trolley Car	0	0.0	0	0.0	0	0.0	0.5
Subway or Elevated	0	0.0	0	0.0	0	0.0	0.2
Railroad	0	0.0	0	0.0	0	0.0	0.1
Ferryboat	0	0.0	0	0.0	0	0.0	0.1
Bicycle	1,150	0.9	361	0.3	1,511	0.6	0.7
Walked	2,351	1.8	1,370	1.3	3,721	1.6	2.4
Taxicab, Motorcycle, or other	4,042	3.2	2,160	2.0	6,202	2.6	1.7
Worked at Home	12,664	9.9	15,861	14.7	28,525	12.1	17.2
Total:	127,796	100.0	108,199	100.0	235,995	100.0	

Source: 2022 1-year American Community Survey, Summary File

Table 7. SEX OF WORKERS BY MODE OF TRANSPORTATION TO WORK FOR WORKPLACE GEOGRAPHY

Mode of Transit	Male		Female		All Workers		All of CA (%)
	#	(%)	#	(%)	#	(%)	
Car, Truck, or Van:	122,707	85.9	114,370	84.5	237,077	85.2	75.3
Drove Alone	108,205	75.7	99,032	73.2	207,237	74.5	65.5
Carpooled:	14,502	10.2	15,338	11.3	29,840	10.7	9.8
In 2-person carpool	6,441	4.5	9,235	6.8	15,676	5.6	7.0
In 3-person carpool	4,621	3.2	2,912	2.2	7,533	2.7	1.7
In 4-or-more-person carpool	3,440	2.4	3,191	2.4	6,631	2.4	1.2
Public Transportation (excl Taxi):	983	0.7	1,090	0.8	2,073	0.7	2.6
Bus or Trolley Bus	983	0.7	1,090	0.8	2,073	0.7	1.8
Streetcar or Trolley Car	0	0.0	0	0.0	0	0.0	0.5
Subway or Elevated	0	0.0	0	0.0	0	0.0	0.2
Railroad	0	0.0	0	0.0	0	0.0	0.1
Ferryboat	0	0.0	0	0.0	0	0.0	0.1
Bicycle	1,154	0.8	401	0.3	1,555	0.6	0.7
Walked	2,316	1.6	1,721	1.3	4,037	1.5	2.4
Taxicab, Motorcycle, or other	3,028	2.1	1,847	1.4	4,875	1.8	1.7
Worked at Home	12,664	8.9	15,861	11.7	28,525	10.3	17.2
Total:	142,852	100.0	135,290	100.0	278,142	100.0	

Source: 2022 1-year American Community Survey, Summary File

The results in this table are for those who work in the region, regardless of the location of their residence.

Commute Times for Employed Residents

Table 8. SEX OF WORKERS BY TRAVEL TIME TO WORK

Mode of Transit	Male		Female		All Workers		All of CA
	#	(%)	#	(%)	#	(%)	(%)
Less than 5 minutes	4,160	3.6	1,450	1.5	5,610	2.7	2.1
5 to 9 minutes	9,462	8.2	10,948	11.5	20,410	9.8	7.8
10 to 14 minutes	15,819	13.7	14,242	15.0	30,061	14.5	12.4
15 to 19 minutes	24,807	21.5	19,438	20.4	44,245	21.3	15.4
20 to 24 minutes	23,842	20.7	21,660	22.8	45,502	21.9	14.8
25 to 29 minutes	8,215	7.1	6,389	6.7	14,604	7.0	6.4
30 to 34 minutes	13,988	12.1	11,495	12.1	25,483	12.3	15.2
35 to 39 minutes	1,142	1.0	1,424	1.5	2,566	1.2	2.9
40 to 44 minutes	1,956	1.7	829	0.9	2,785	1.3	4.1
45 to 59 minutes	3,871	3.4	1,617	1.7	5,488	2.6	8.2
60 to 89 minutes	5,009	4.4	2,295	2.4	7,304	3.5	7.2
90 or more minutes	2,861	2.5	551	0.6	3,412	1.6	3.6
Total:	115,132	100.0	92,338	97.0	207,470	100.0	

Source: 2022 1-year American Community Survey, Summary File

Figure 79: Percent of Employed Population With Commutes of More than 30 Minutes

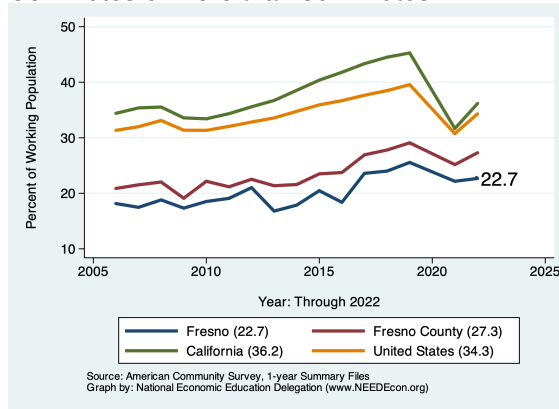


Figure 80: Percent of Employed Population With Commutes of More than 90 Minutes

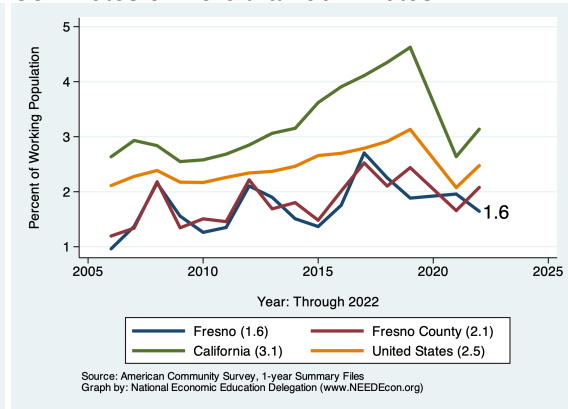
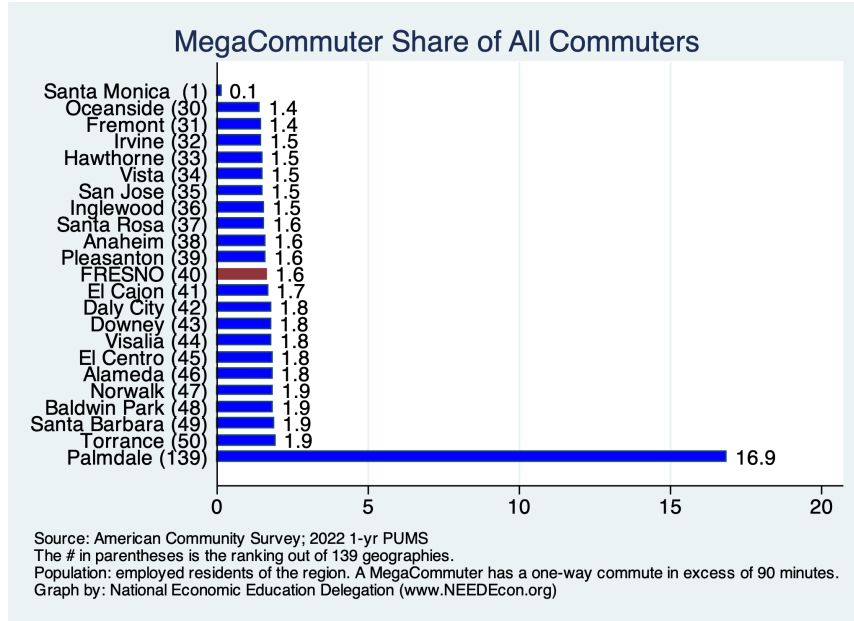


Figure 81: Rank: Share of MegaCommuters Across Similar Geographies



Source: American Community Survey; 2022 1-yr PUMS
 The # in parentheses is the ranking out of 139 geographies.
 Population: employed residents of the region. A MegaCommuter has a one-way commute in excess of 90 minutes.
 Graph by: National Economic Education Delegation (www.NEEDecon.org)

Commute Times for Those Employed in the City

Table 9. SEX OF WORKERS BY TRAVEL TIME TO WORK FOR WORKPLACE GEOGRAPHY

Mode of Transit	Male		Female		All Workers		All of CA (%)
	#	(%)	#	(%)	#	(%)	
Less than 5 minutes	4,389	3.3	2,031	1.7	6,420	2.6	2.1
5 to 9 minutes	10,737	8.1	13,372	11.2	24,109	9.6	7.8
10 to 14 minutes	17,478	13.3	16,522	13.8	34,000	13.6	12.4
15 to 19 minutes	28,581	21.7	21,597	18.1	50,178	20.0	15.3
20 to 24 minutes	26,243	19.9	25,197	21.1	51,440	20.5	14.8
25 to 29 minutes	8,466	6.4	9,348	7.8	17,814	7.1	6.4
30 to 34 minutes	18,006	13.7	17,773	14.9	35,779	14.3	15.2
35 to 39 minutes	913	0.7	2,640	2.2	3,553	1.4	2.9
40 to 44 minutes	2,777	2.1	2,165	1.8	4,942	2.0	4.1
45 to 59 minutes	5,757	4.4	4,174	3.5	9,931	4.0	8.2
60 to 89 minutes	3,555	2.7	3,465	2.9	7,020	2.8	7.2
90 or more minutes	3,286	2.5	1,145	1.0	4,431	1.8	3.6
Total:	130,188	98.7	119,429	100.0	249,617	99.6	

Source: 2022 1-year American Community Survey, Summary File

The results in this table are for those who work in the region, regardless of the location of their residence.

Figure 82: Percent of Local Employees With Commutes of More than 30 Minutes

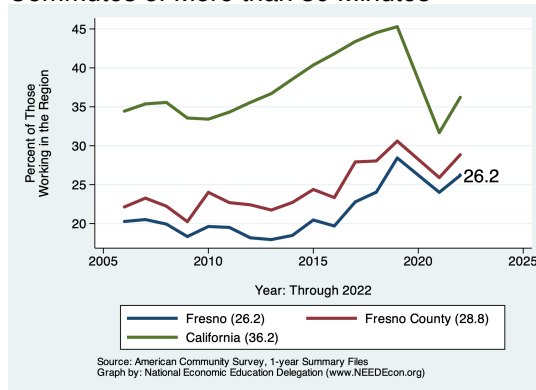


Figure 83: Percent of Local Employees With Commutes of More than 90 Minutes

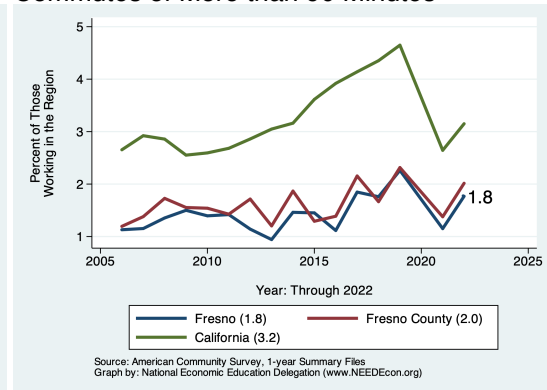
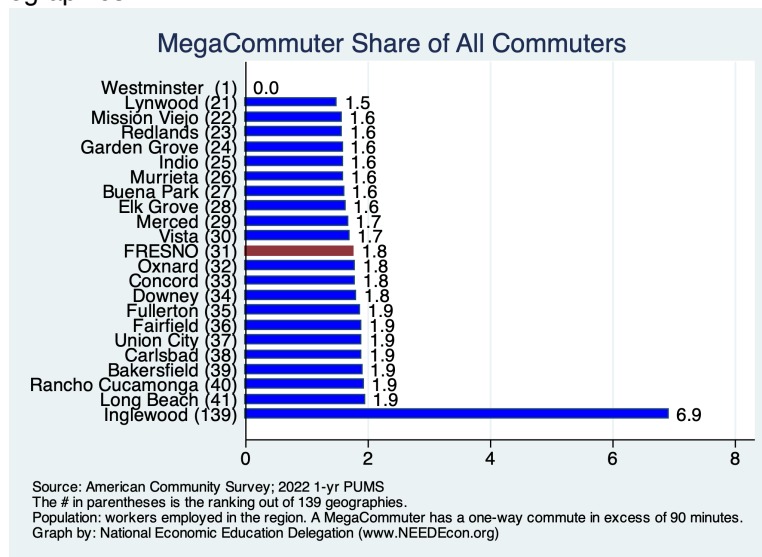


Figure 84: Rank: Share of MegaCommuters Across Similar Geographies



Place of Work

This section provides evidence on where workers living in Fresno work. As evidenced in the first table, some of Fresno's employed workers work in the City, but many do not. The first table and graph pair provide evidence at the county level while the second provide evidence with regard to working outside of the Fresno city boundary.

Table 10. SEX OF WORKERS BY PLACE OF WORK—STATE AND COUNTY LEVEL

Place of Work	Male		Female		All Workers		All of CA (%)
	#	(%)	#	(%)	#	(%)	
Worked in state of residence:	127,560	99.8	108,199	100.0	235,759	99.9	99.6
Worked in county of residence	116,904	91.5	103,263	95.4	220,167	93.3	85.3
worked outside of county of residence	10,656	8.3	4,936	4.6	15,592	6.6	14.3
Worked outside state of residence	236	0.2	0	0.0	236	0.1	0.4
Total:	127,796	100.0	108,199	100.0	235,995	100.0	

Source: 2022 1-year American Community Survey, Summary File

Figure 85: Percent of Workers Employed Outside of Their County of Residence

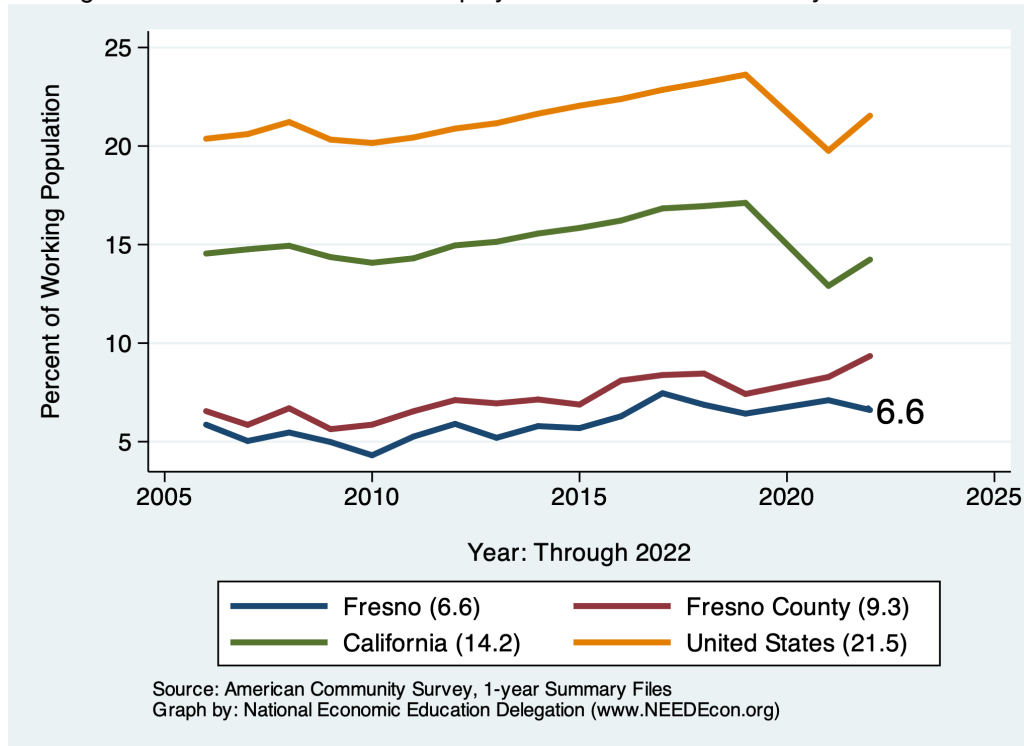
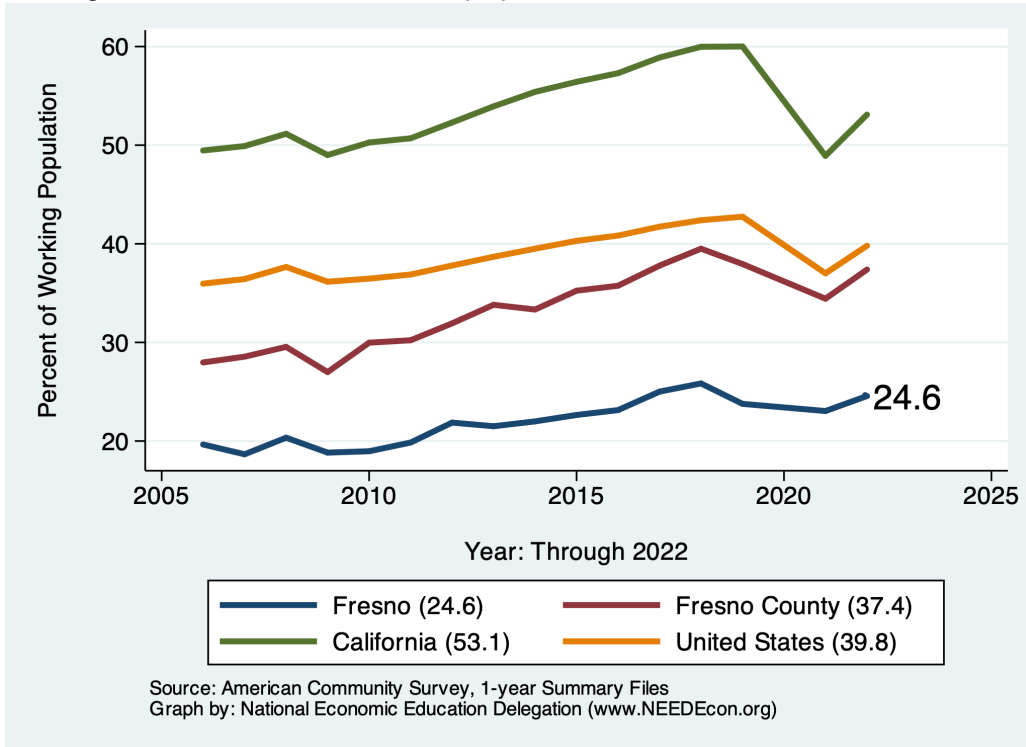


Table 11. SEX OF WORKERS BY PLACE OF WORK—PLACE LEVEL

Place of Work	Male		Female		All Workers		All of CA (%)
	#	(%)	#	(%)	#	(%)	
Living in a place:	127,796	100.0	108,199	100.0	235,995	100.0	95.8
Worked in place of residence	90,933	71.2	87,094	80.5	178,027	75.4	42.3
Worked outside place of residence	36,863	28.8	21,105	19.5	57,968	24.6	53.4
Not living in a place	0	0.0	0	0.0	0	0.0	4.2
Total:	127,796	100.0	108,199	100.0	235,995	100.0	

Source: 2022 1-year American Community Survey, Summary File

Figure 86: Percent of Workers Employed Outside of Their Place of Residence



Commute Mode by Income

**Table 12. MEDIAN EARNINGS IN THE PAST 12 MONTHS
BY MEANS OF TRANSPORTATION TO WORK**

	City	California	Ratio	United States	
	Median	Median		Median	Ratio
Car, truck, or van - drove alone	41,470	48,335	107.5	45,677	105.8
Car, truck, or van - carpooled	31,008	35,926	108.1	34,518	104.7
Public transportation (excluding taxicab)	27,971	34,625	101.2	41,443	78.7
Walked	21,912	30,552	89.8	27,247	93.7
Taxicab, motorcycle, bicycle, or other means	30,787	40,631	94.9	36,218	99.1
Worked from home	45,118	79,738	70.9	69,180	76.0
Total:	39,776	49,818	79.8	46,365	85.8

Source: 2022 1-year American Community Survey, Summary File

Notes: 1) Ratio = the ratio of the regional median to either the CA or US median, relative to the Total ratio.

Values above 100 imply a high local median. Values below 100 imply a low local median.

For example, a value of 200 means that the local mean is 2x higher than would be expected.

For "Total:", ratio is simply the ratio of the medians.

2) For regions with more than one geography, the medians are averages weighted by working population.

Table 13. MODE OF TRANSPORTATION TO WORK BY WORKERS' EARNINGS

Mode of Transit	< \$25,000		\$25,000-\$74,999		\$75,000+		All		All of CA
	#	(%)	#	(%)	#	(%)	#	(%)	(%)
Car, Truck, or Van: Drove Alone	47,127	48.5	60,617	68.8	35,668	74.6	168,132	71.2	68.4
Car, Truck, or Van: Carpooled	10,050	10.3	7,195	8.2	3,553	7.4	24,990	10.6	9.5
Public Transportation (excl Taxi)	1,869	1.9	532	0.6	142	0.3	2,790	1.2	3.6
Walked	1,930	2.0	771	0.9	229	0.5	3,467	1.5	2.4
Taxicab, Motorcycle, or other	1,898	2.0	929	1.1	666	1.4	4,247	1.8	2.4
Worked at Home	5,961	6.1	6,787	7.7	5,322	11.1	19,657	8.3	13.6
Total:	68,835	70.9	76,831	87.2	45,580	95.3	223,283	94.6	100.0

Source: 2022 5-year American Community Survey, Summary File

**Table 14. MODE OF TRANSPORTATION TO WORK BY WORKERS' EARNINGS FOR
WORKPLACE GEOGRAPHY**

Mode of Transit	< \$25,000		\$25,000-\$74,999		\$75,000+		All		All of CA
	#	(%)	#	(%)	#	(%)	#	(%)	(%)
Car, Truck, or Van: Drove Alone	54,507	51.0	73,730	71.6	49,694	76.1	205,667	73.9	68.5
Car, Truck, or Van: Carpooled	9,909	9.3	8,956	8.7	4,086	6.3	27,395	9.8	9.5
Public Transportation (excl Taxi)	1,842	1.7	707	0.7	211	0.3	2,940	1.1	3.6
Walked	1,779	1.7	817	0.8	268	0.4	3,309	1.2	2.4
Taxicab, Motorcycle, or other	1,849	1.7	962	0.9	769	1.2	4,319	1.6	2.4
Worked at Home	5,961	5.6	6,787	6.6	5,322	8.1	19,657	7.1	13.6
Total:	75,847	71.0	91,959	89.4	60,350	92.4	263,287	94.7	

Source: 2022 5-year American Community Survey, Summary File

The results in this table are for those who work in the region, regardless of the location of their residence.

Commute Mode by Poverty Status

Table 15. MODE OF TRANSPORTATION TO WORK BY POVERTY STATUS

Mode of Transit	In Poverty		100-149% of Pov		>150% of Pov		All		All of CA (%)
	#	(%)	#	(%)	#	(%)	#	(%)	
Car, Truck, or Van: Drove Alone	13,941	46.6	13,713	57.5	144,591	73.6	172,245	73.2	65.8
Car, Truck, or Van: Carpooled	2,954	9.9	1,435	6.0	17,373	8.8	21,762	9.3	9.8
Public Transportation (excl Taxi)	195	0.7	249	1.0	1,062	0.5	1,506	0.6	2.6
Walked	728	2.4	453	1.9	2,398	1.2	3,579	1.5	2.1
Taxicab, Motorcycle, or other	1,168	3.9	888	3.7	5,657	2.9	7,713	3.3	2.4
Worked at Home	1,426	4.8	1,598	6.7	25,326	12.9	28,350	12.1	17.2
Total:	20,412	68.2	18,336	76.9	196,407		235,155		

Source: 2022 1-year American Community Survey, Summary File

Table 16. MODE OF TRANSPORTATION TO WORK BY POVERTY STATUS FOR WORKPLACE GEOGRAPHY

Mode of Transit	In Poverty		100-149% of Pov		>150% of Pov		All		All of CA (%)
	#	(%)	#	(%)	#	(%)	#	(%)	
Car, Truck, or Van: Drove Alone	14,465	51.1	13,180	54.8	179,400	75.1	207,045	74.6	65.8
Car, Truck, or Van: Carpooled	3,544	12.5	1,640	6.8	24,611	10.3	29,795	10.7	9.8
Public Transportation (excl Taxi)	262	0.9	249	1.0	1,562	0.7	2,073	0.7	2.6
Walked	662	2.3	453	1.9	2,841	1.2	3,956	1.4	2.1
Taxicab, Motorcycle, or other	708	2.5	438	1.8	5,284	2.2	6,430	2.3	2.4
Worked at Home	1,426	5.0	1,598	6.6	25,326	10.6	28,350	10.2	17.2
Total:	21,067	74.5	17,558	73.0	239,024		277,649		100.0

Source: 2022 1-year American Community Survey, Summary File

The results in this table are for those who work in the region, regardless of the location of their residence.

Migration

Overall Migration Flows

Definition:

The United States is a country with an increasingly mobile population. People move, migrate, from one place to another with increasing frequency.

Why is it important?

Having a handle on whether or not Fresno is a net recipient (migration inflows) or donor (mi-

gration outflows) of population is very important for understanding trends in the City's development. This section outlines migration patterns by age, education, income, marital status, and housing tenure. Understanding recent trends is very important for making policy, investment, and other decisions about the future. Also, understanding the extent to which the population is stable, or experiences significant turnover each year is helpful for planning purposes.

Figure 87: Overall Movements of Residents

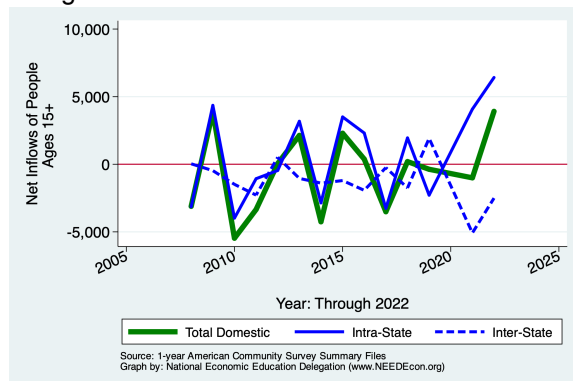


Table 17: Migration by Income

Category	Population	Net Inflows				
		All Migration	Same State		Across States	From Abroad
			W/in County	Between Counties		
No income	73,185	1,062	2,185	-1,098	-794	769
With income	343,018	5,244	3,447	1,882	-1,710	1,625
\$1 to \$9,999 or less	54,402	976	855	177	-651	595
\$10,000 to \$14,999	37,336	2,731	1,475	685	28	543
\$15,000 to \$24,999	48,744	1,210	493	606	-146	257
\$25,000 to \$34,999	40,820	-871	-494	138	-515	0
\$35,000 to \$49,999	52,787	2,270	2,084	263	-77	0
\$50,000 to \$64,999	36,638	115	667	176	-851	123
\$65,000 to \$74,999	13,992	-105	30	-108	-27	0
\$75,000 or more	58,299	-1,082	-1,663	-55	529	107
All:	416,203	6,306	5,632	784	-2,504	2,394

Source: 2022 1-year American Community Survey, Summary File

Note: The data in this and other tables in this section are limited in that there is no information on the City's population that has moved abroad.

The "From Abroad" column is gross movements into the City from abroad.

Figure 88: Overall Movements of Low Income Residents

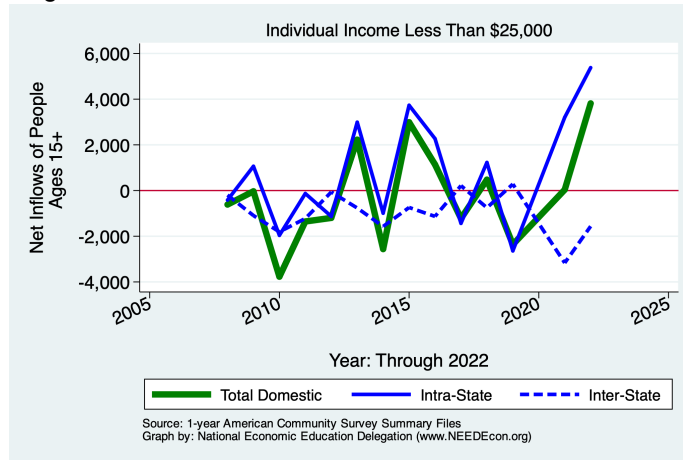


Figure 89: Overall Movements of Middle Income Residents

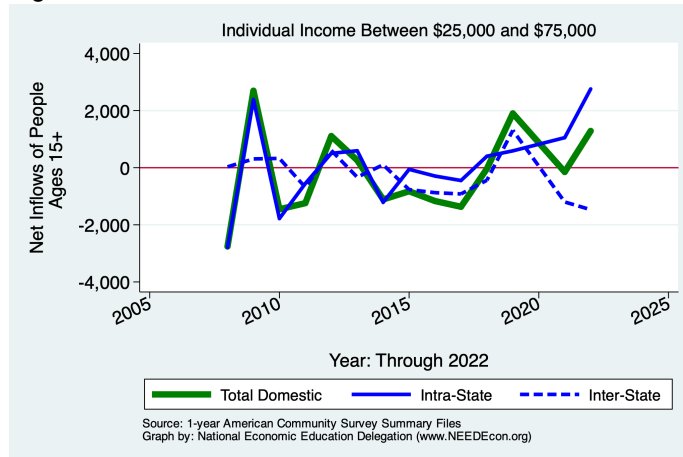
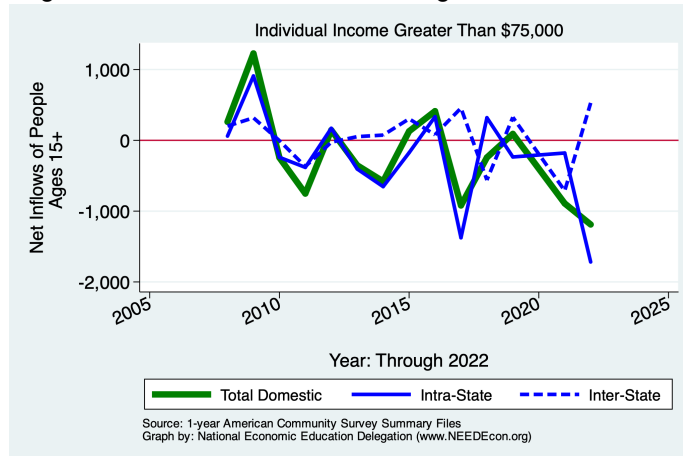


Figure 90: Overall Movements of High Income Residents



Demographics of Migration Flows

Table 18: Migration by Marital Status

Category	Population	Net Inflows				
		All Migration	Same State		Across States	From Abroad
			W/in County	Between Counties		
Never married	182,583	7,883	6,845	813	-1,410	1,635
Now married, except separated	162,953	-1,743	-498	-1,216	-495	466
Divorced	37,181	-439	-870	726	-295	0
Separated	12,734	740	255	278	-32	239
Widowed	20,752	-135	-100	183	-272	54
Total:	416,203	6,306	5,632	784	-2,504	2,394

Source: 2022 1-year American Community Survey, Summary File

Table 19: Migration by Tenure

Category	Population	Net Inflows				
		All Migration	Same State		Across States	From Abroad
			W/in County	Between Counties		
Householder lived in owner-occupied housing units	278,397	-3,459	-1,586	-1,549	-575	251
Householder lived in renter-occupied housing units	248,457	10,920	5,960	3,035	-667	2,592
Total:	526,854	7,461	4,374	1,486	-1,242	2,843

Source: 2022 1-year American Community Survey, Summary File

Figure 91: Domestic Movements of Residents by Tenure

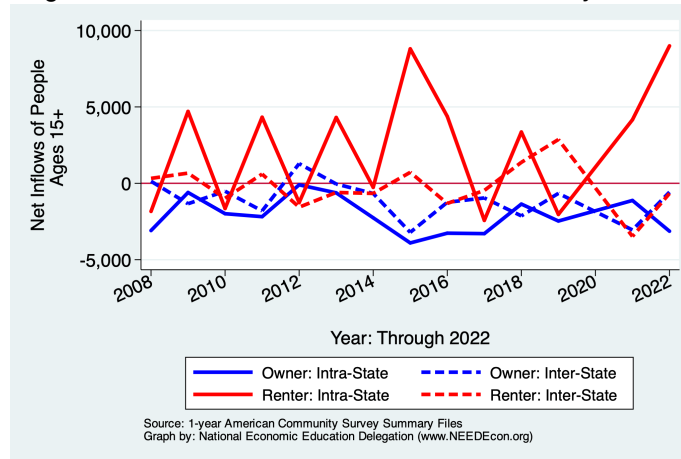


Table 20: Migration by Age

Category	Population	Net Inflows					From Abroad
		All Migration	Same State		Across States		
			W/in County	Between Counties			
1 to 4 years	29,843	263	-172	395	40	0	
5 to 17 years	114,399	1,111	147	344	171	449	
18 and 19 years	14,745	873	1,992	-736	-569	186	
20 to 24 years	41,054	2,324	1,960	48	-143	459	
25 to 29 years	41,115	1,948	1,772	-35	-35	246	
30 to 34 years	45,438	1,670	586	917	-72	239	
35 to 39 years	41,140	614	813	-366	-147	314	
40 to 44 years	35,173	251	-406	339	-198	516	
45 to 49 years	29,221	1	-299	116	-20	204	
50 to 54 years	26,965	-964	-599	-60	-305	0	
55 to 59 years	25,485	-304	-104	265	-521	56	
60 to 64 years	25,818	-39	-233	113	81	0	
65 to 69 years	22,663	-475	-308	-84	-203	120	
70 to 74 years	17,709	150	-9	168	-9	0	
75 years and over	26,226	436	204	206	-28	54	
Total Population:	536,994	7,859	5,344	1,630	-1,958	2,843	

Source: 2022 1-year American Community Survey, Summary File

Table 21: Migration by Educational Attainment

Category	Population	Net Inflows					From Abroad
		All Migration	Same State		Across States		
			W/in County	Between Counties			
Less than high school graduate	65,442	2,755	694	1,140	178	743	
High school graduate (includes equiv)	75,727	1,511	1,209	56	-233	479	
Some college or assoc. degree	110,900	-1,524	-701	-216	-837	230	
Bachelor's degree	57,883	1,932	1,345	869	-459	177	
Graduate or professional degree	27,001	-1,386	-1,130	-270	-106	120	
Total:	336,953	3,288	1,417	1,579	-1,457	1,749	

Source: 2022 1-year American Community Survey, Summary File

Table 22: Median Income of Migration Flows

Flow	In-Migration	Out-Migration
Same House 1 Year Ago	32,263	32,263
Moved Within Same County	30,823	31,986
Moved to Different County, Same State	22,482	32,496
Moved Between States	77,455	32,339
Moved from Abroad	11,001	
Total Population:	32,021	32,253

Source: 2022 1-year American Community Survey, Summary File

Table 23: Median Age of Migration Flows

Flow	In-Migration	Out-Migration
Same House 1 Year Ago	34.3	34.3
Moved Within Same County	26.3	27.5
Moved to Different County, Same State	28.9	26.4
Moved Between States	32.5	39.7
Moved from Abroad	34.3	
Total Population:	33.0	33.3

Source: 2022 1-year American Community Survey, Summary File

References and Sources

The majority of the data presented in this report are from the American Community Survey (ACS). For larger geographies, the 1-year Summary Files provide the data. For smaller communities, roughly those with less than 65,000 in population in 2021, the 5-year Summary Files provide the data.

The ACS data are supplemented by building permit data from the U.S. Census Bureau, population and housing data from the California Department of Finance, and home price and rental rates from Zillow.

U.S. Census Bureau. American Community Survey 1-year and 5-year Summary Files. <https://www.census.gov/programs-surveys/acs/data/data-via-ftp.html>. The 1-year data are released in September each year and the 5-year data are released in January.

Zillow Research Data <https://www.zillow.com/research/data/>

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