

Fresno PTIS Phase II Transit Market Analysis



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STRATEGIC ECONOMICS**



Overall Purpose of Analysis



Provide economic / market information that:

- Informs decisions about transit infrastructure and service
- Evaluates future potential for transit-supportive land uses
- Ultimately, offers Fresno residents greater mobility options

SE Approach



- Evaluate job clusters that could be served by transit:
 - Economic Performance
 - Transit Supportiveness
 - Commute Patterns
- Forecast future potential for TOD using state and national profiles of who lives/works near transit



Four Major Sources of Transit Ridership

1. Commuters of *Necessity*
2. Commuters of *Choice*
3. *Discretionary* Riders: Shopping, Entertainment
4. *Institutional* Riders: Access to Social Services / Health Care



Focus on Existing Job Centers Because:



- **Jobs Attract Jobs:** almost 80% of job growth is expansion of existing firms
- The commute trip influences most transportation infrastructure decisions
- Job concentrations are easier to serve with transit
- Jobs “move the needle” on transit ridership
- Sustainable land use patterns should include smart *job* growth

Rethinking the Jobs/Housing Balance



- The “Jobs/Housing Balance” is a *regional* construct
- Most people don’t pick where they live based on where they work

Therefore

- Focus *less* on local balance (e.g. 1.5 jobs / household)
- Focus *more* on locating jobs in transit accessible areas

Presentation Outline



- I. Fresno County Overview / Recap of PTIS Phase I Findings
- II. Profile of Major Job Centers in Fresno/Clovis
- III. Long Range Demand for TOD

I. Fresno County Overview



EVALUATION OF PTIS PHASE I FINDINGS

Fresno's Rural Cities



Key Questions:

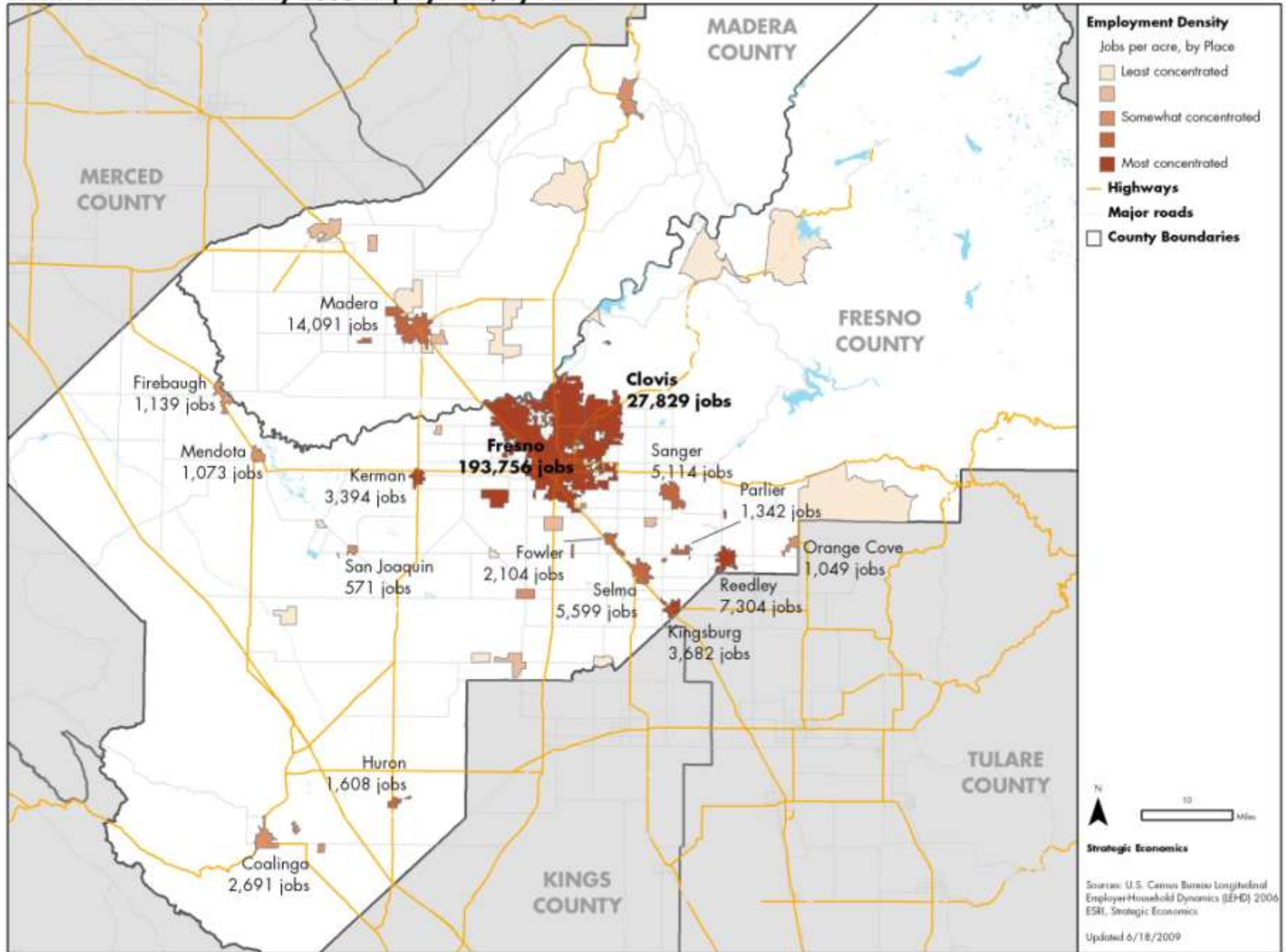
- Do rural cities have major job or housing clusters in need of transit service?
- Do employees commute to these places?
- Are rural cities “bedroom communities” to Fresno/Clovis?

Where are Jobs Located?



- 79% of nonfarm jobs in the County are in the Fresno/Clovis urbanized area
- 10% of nonfarm in all other Fresno County cities
- 11% of nonfarm jobs elsewhere in Fresno County
- About 32,000 jobs in Fresno County are in Agriculture

Fresno and Madera County 2006 Employment, by Place

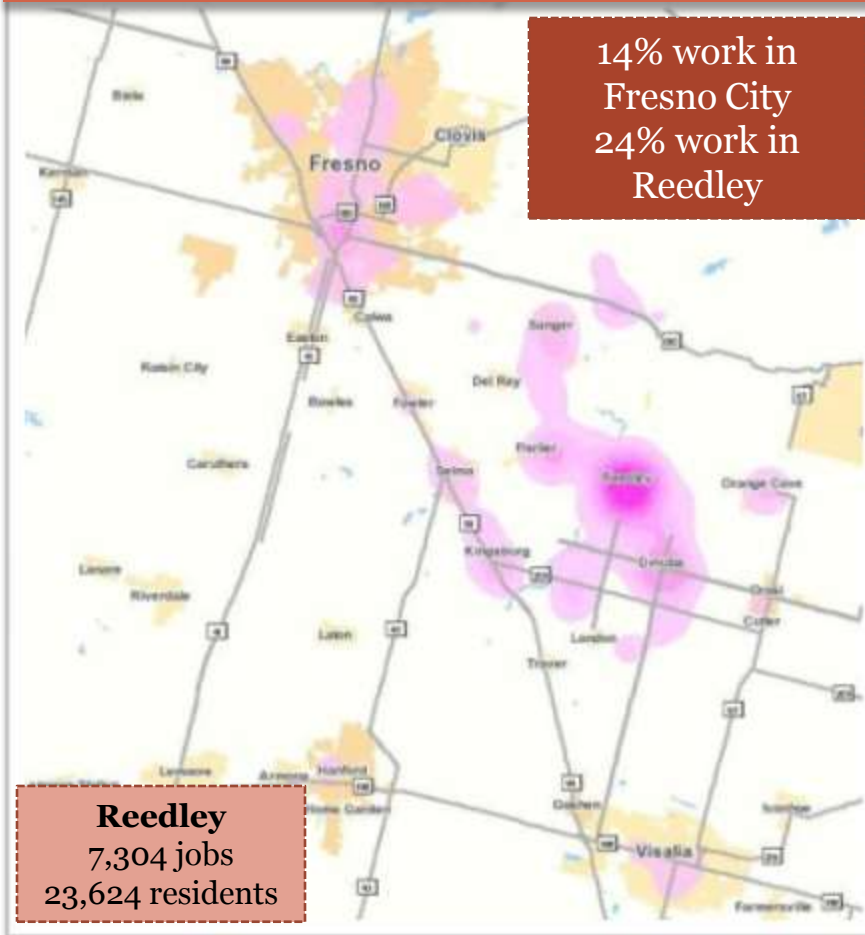


Origin and Destination Studies: Where Residents Work



Reedley

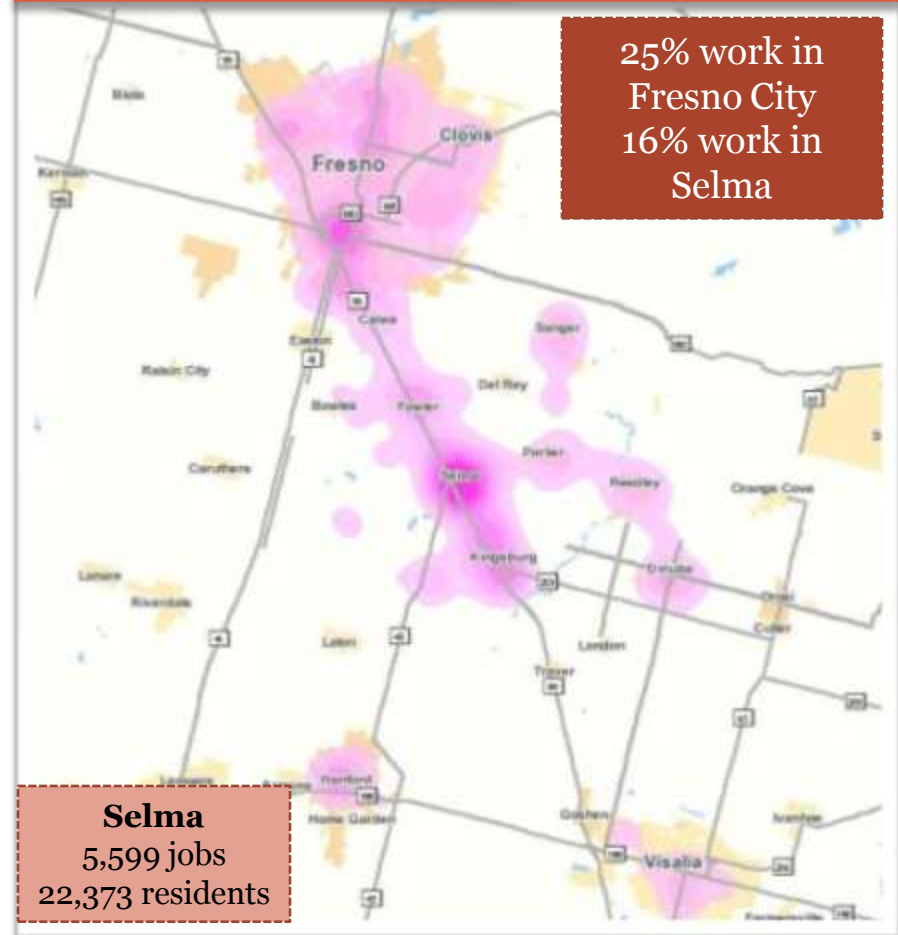
14% work in
Fresno City
24% work in
Reedley



Reedley
7,304 jobs
23,624 residents

Selma

25% work in
Fresno City
16% work in
Selma



Selma
5,599 jobs
22,373 residents



Origin and Destination Studies: Where Workers Live



Reedley

8% live in
Fresno City
29% live in
Reedley

Reedley
7,304 jobs
23,624 residents

Sanger

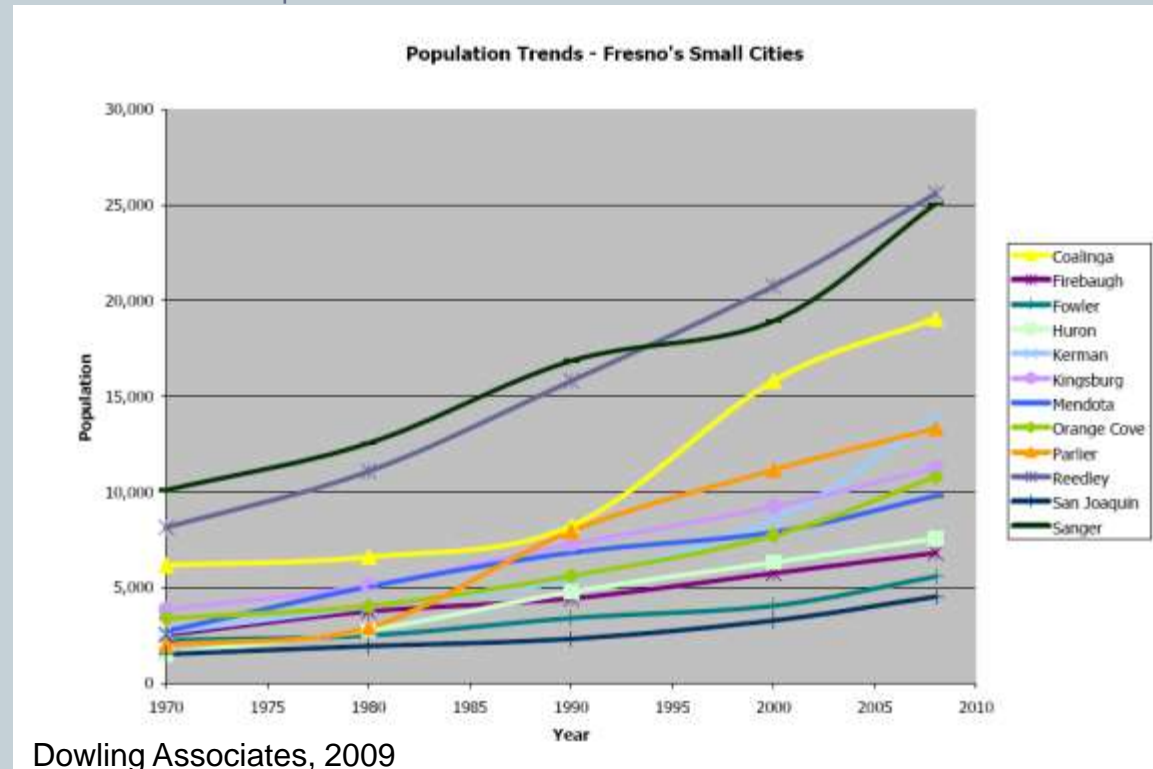
16% live in
Fresno City
28% live in
Sanger

Sanger
5,114 jobs
21,999 residents

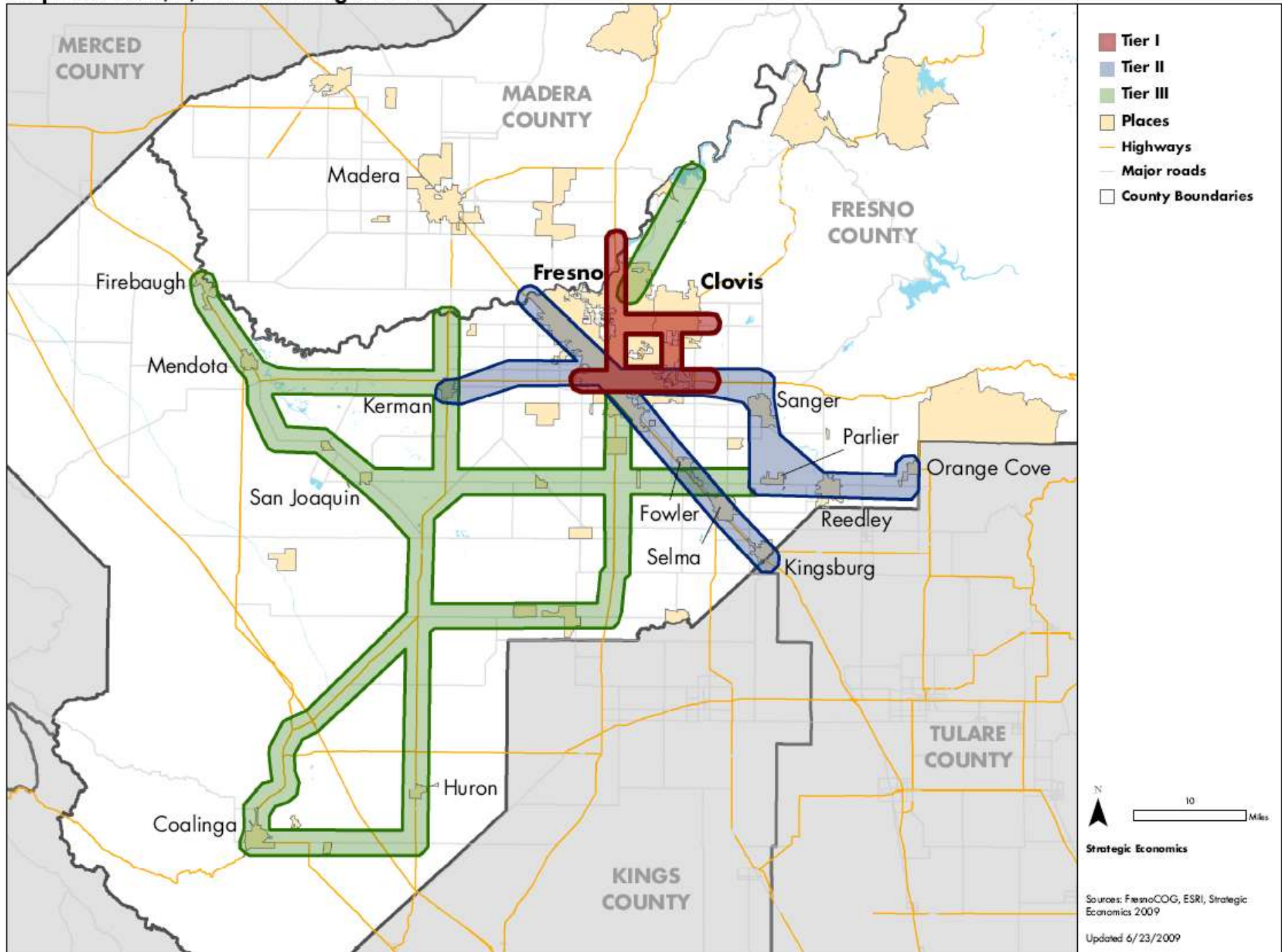


Fresno's Rural Cities

- Reedley, Sanger fastest growing
- Generally, less than 1/3 of rural city workers commute to Fresno City
- Many of these cities have their own job concentrations
- Rural city jobs are mainly Agricultural, Retail, and Education



Proposed Tier I, II, III Transit Alignments



Rural Cities: Recommendations

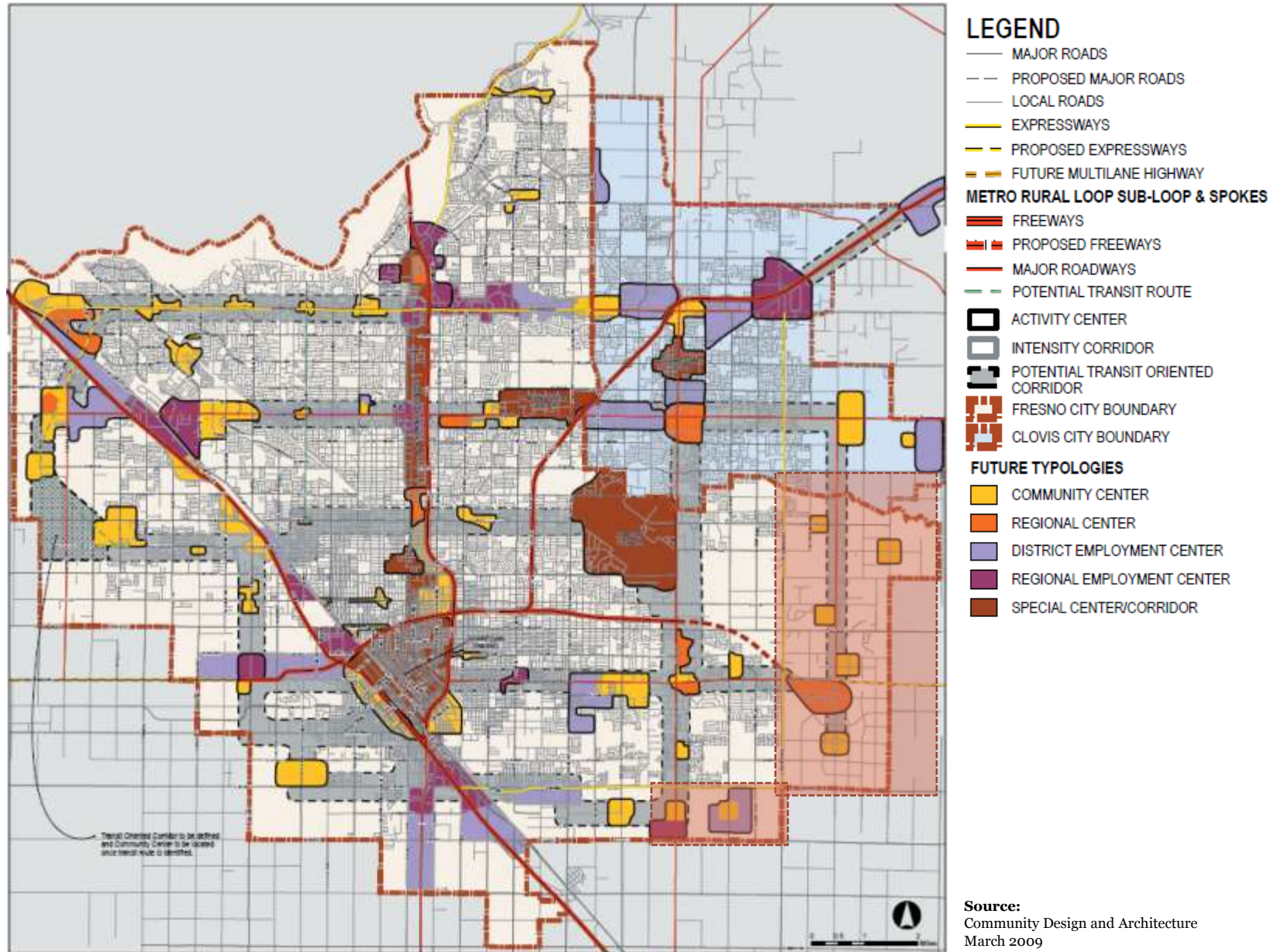


- Tier I and II: transit alignments make sense, Tier II might need refinement
- Tier III: Most trips educational, institutional; not regular commute trips
- Currently, most rural cities are not just bedroom communities to Fresno
- Should not just be considered feeder system to Fresno/Clovis

II. Fresno/Clovis Job Centers

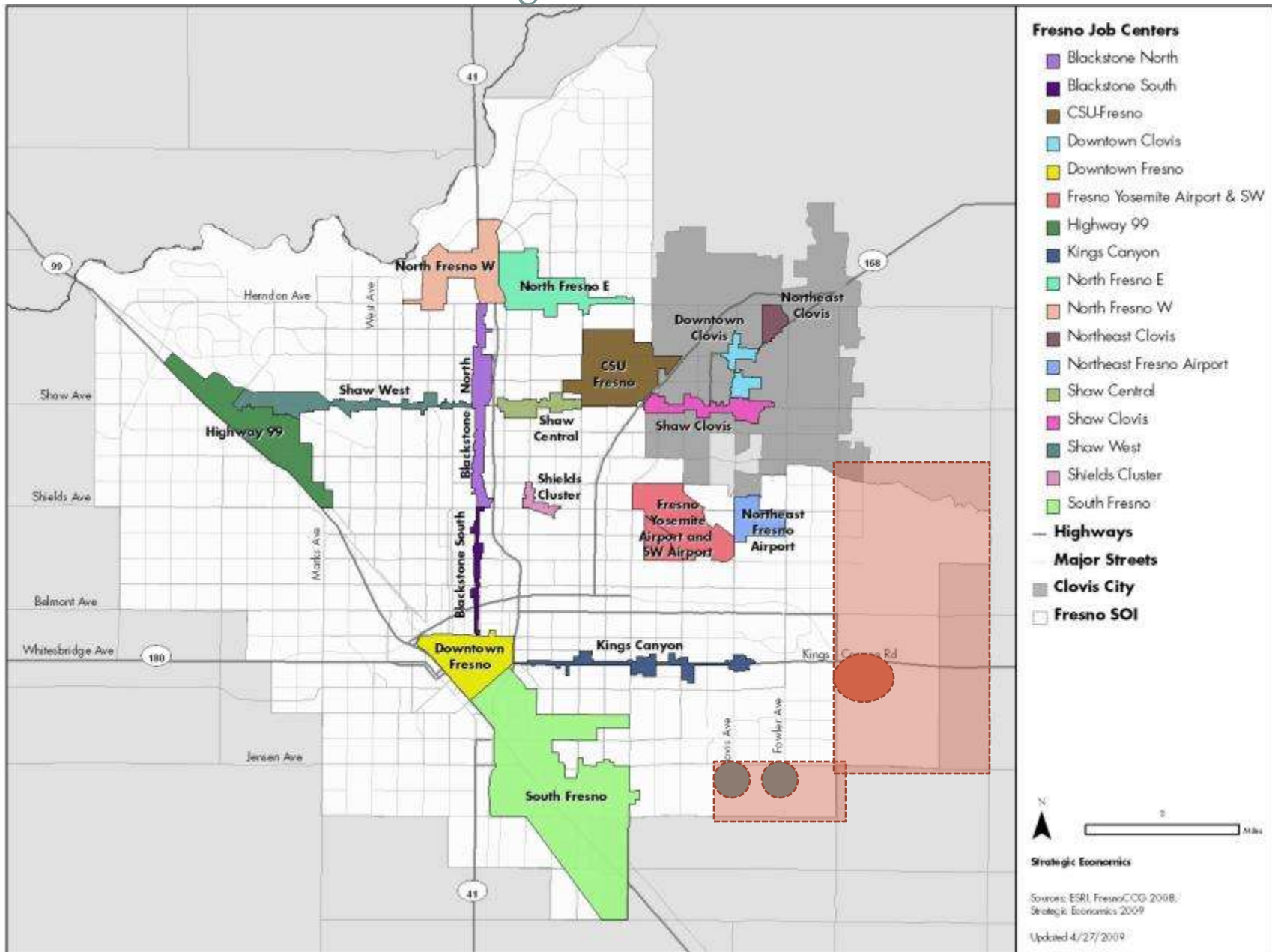


2050 Fresno Activity Centers and Transit Oriented Corridor Typologies

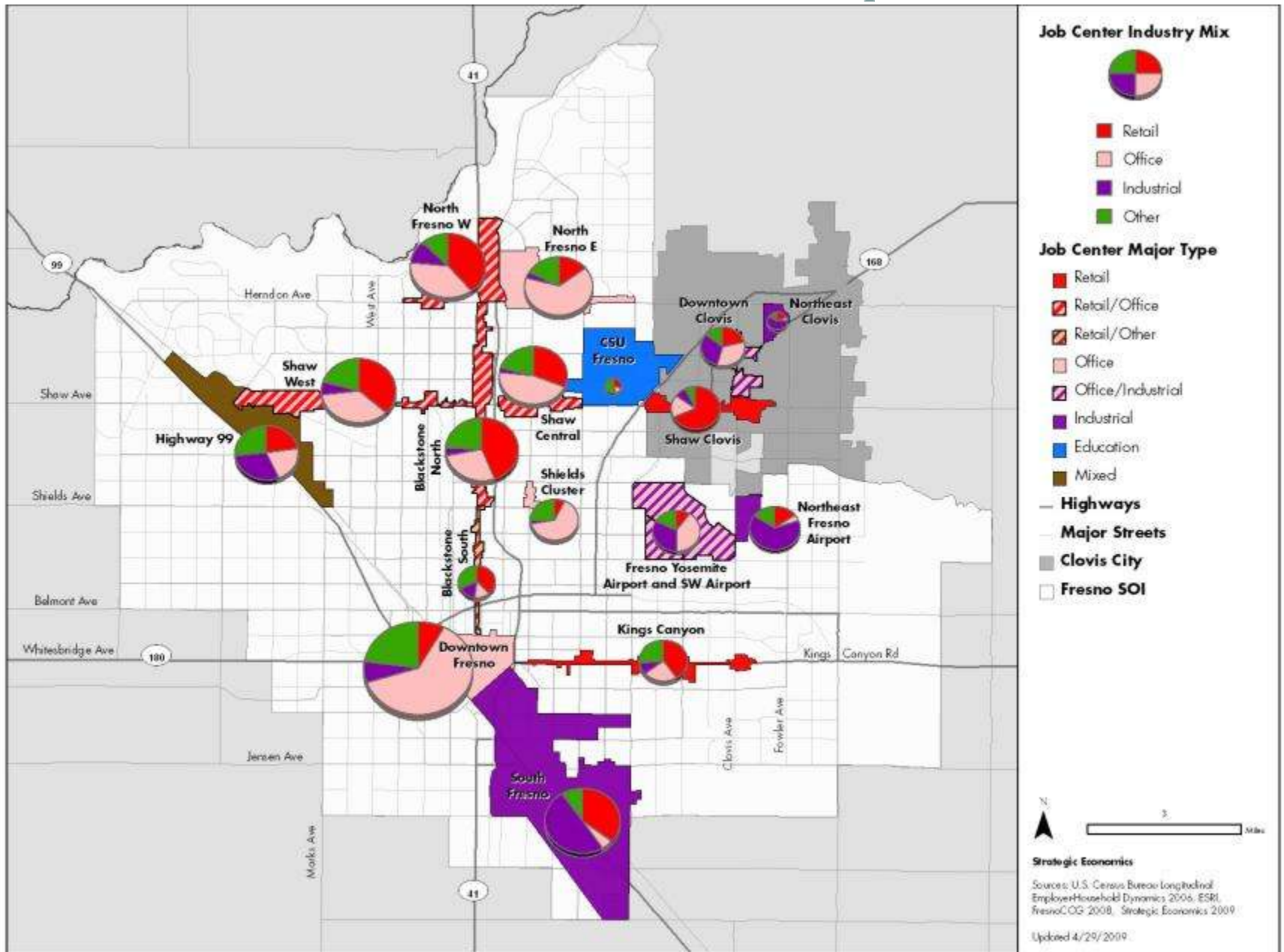


Map includes undeveloped places designated for future growth

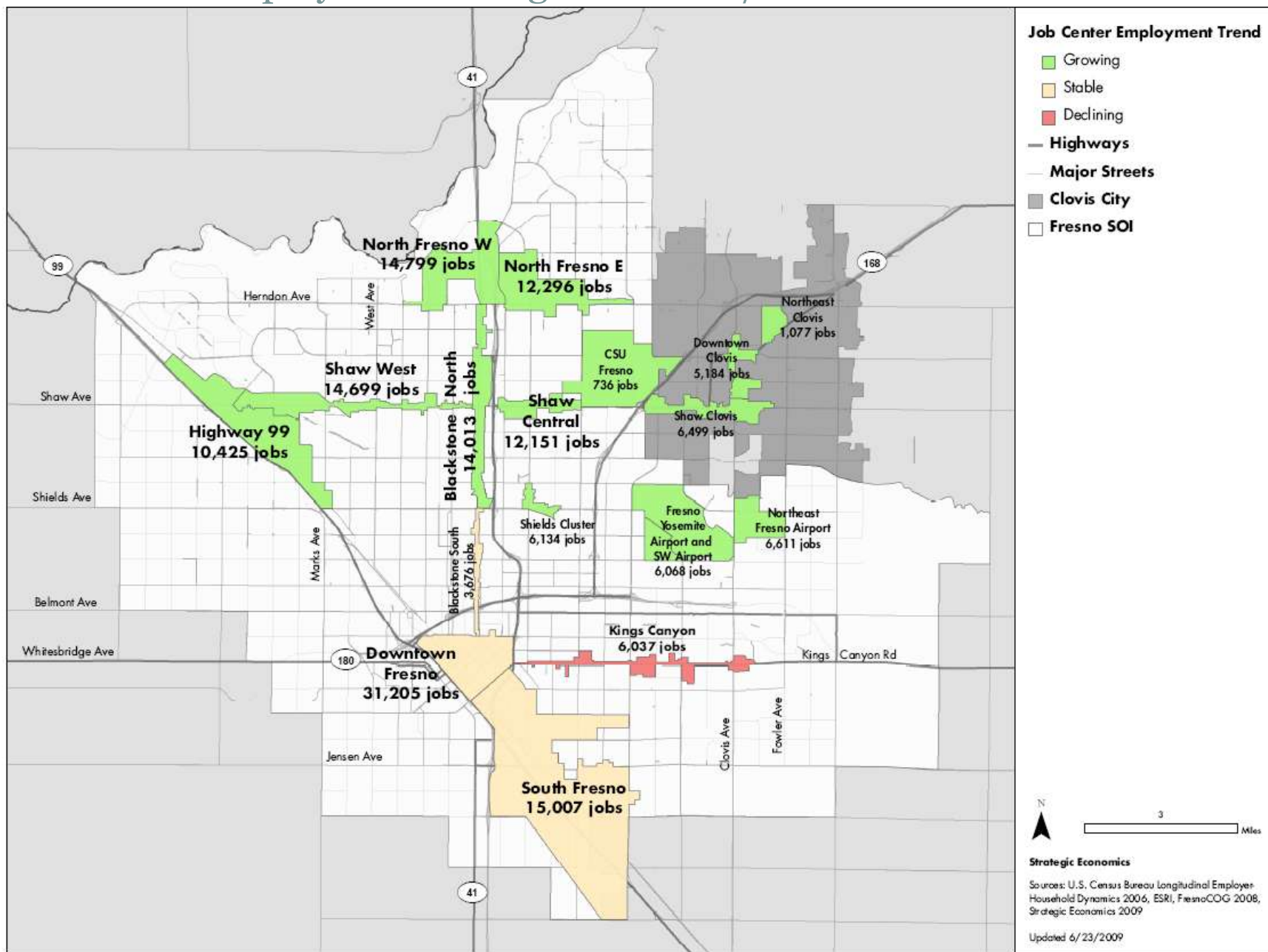
Existing Fresno Job Centers



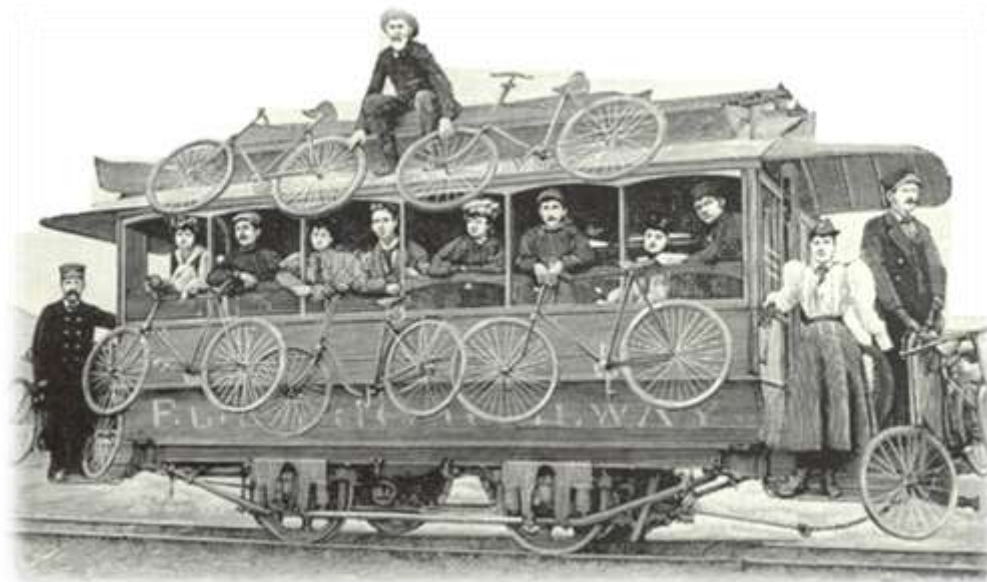
Fresno Job Centers with Descriptions



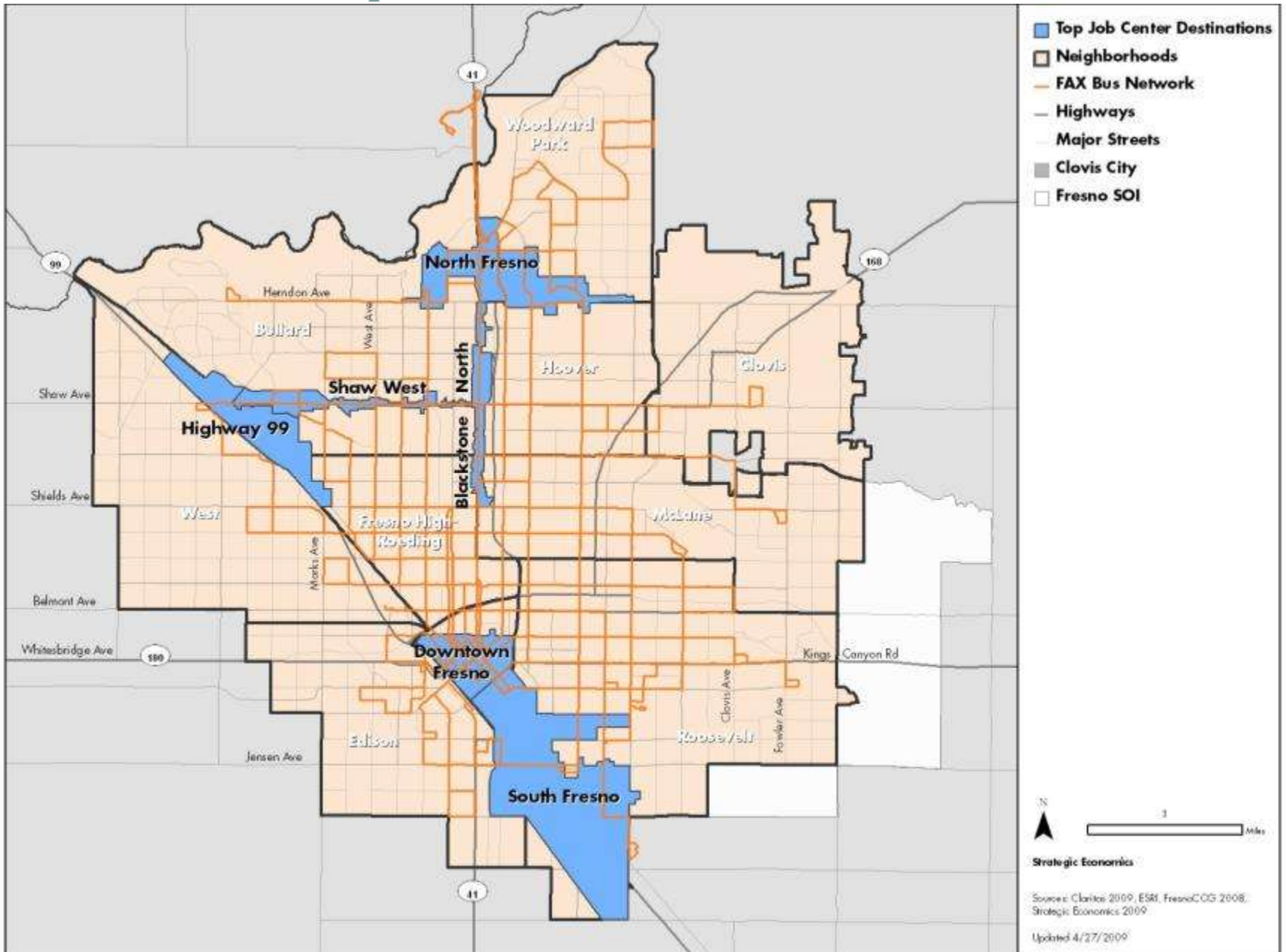
Employment Change in Fresno/Clovis Job Centers



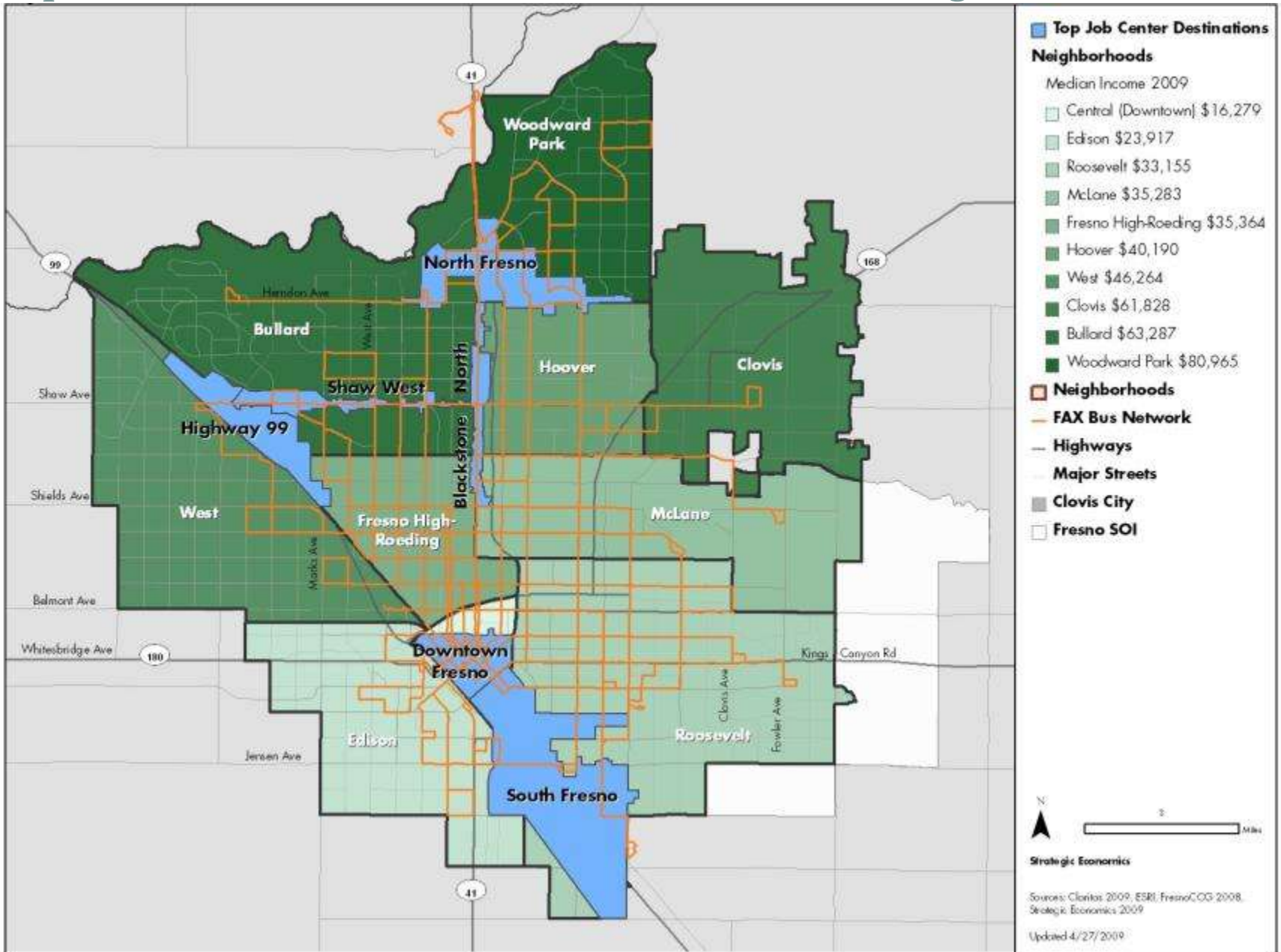
Commute Patterns



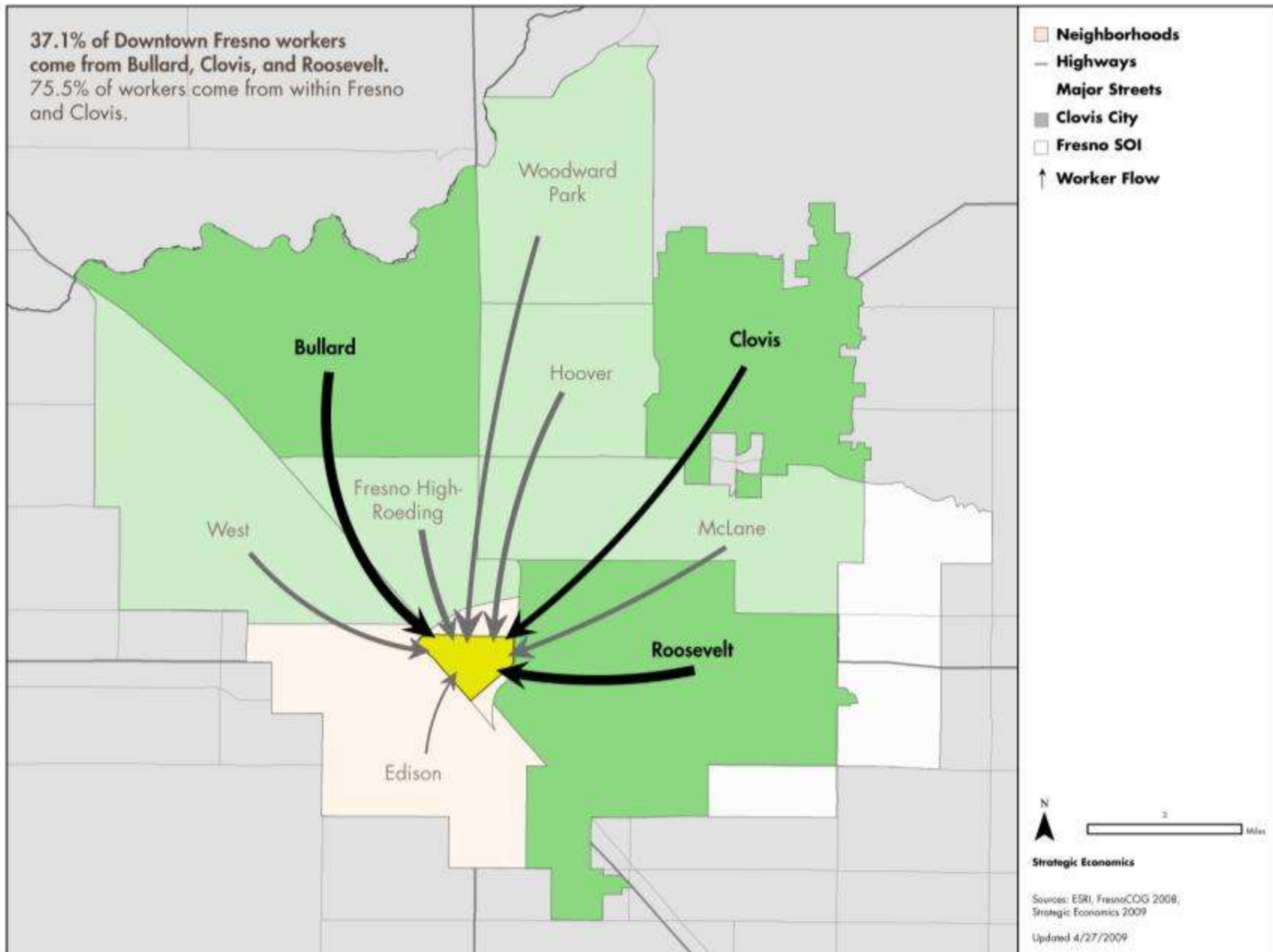
Top Fresno Job Center Destinations



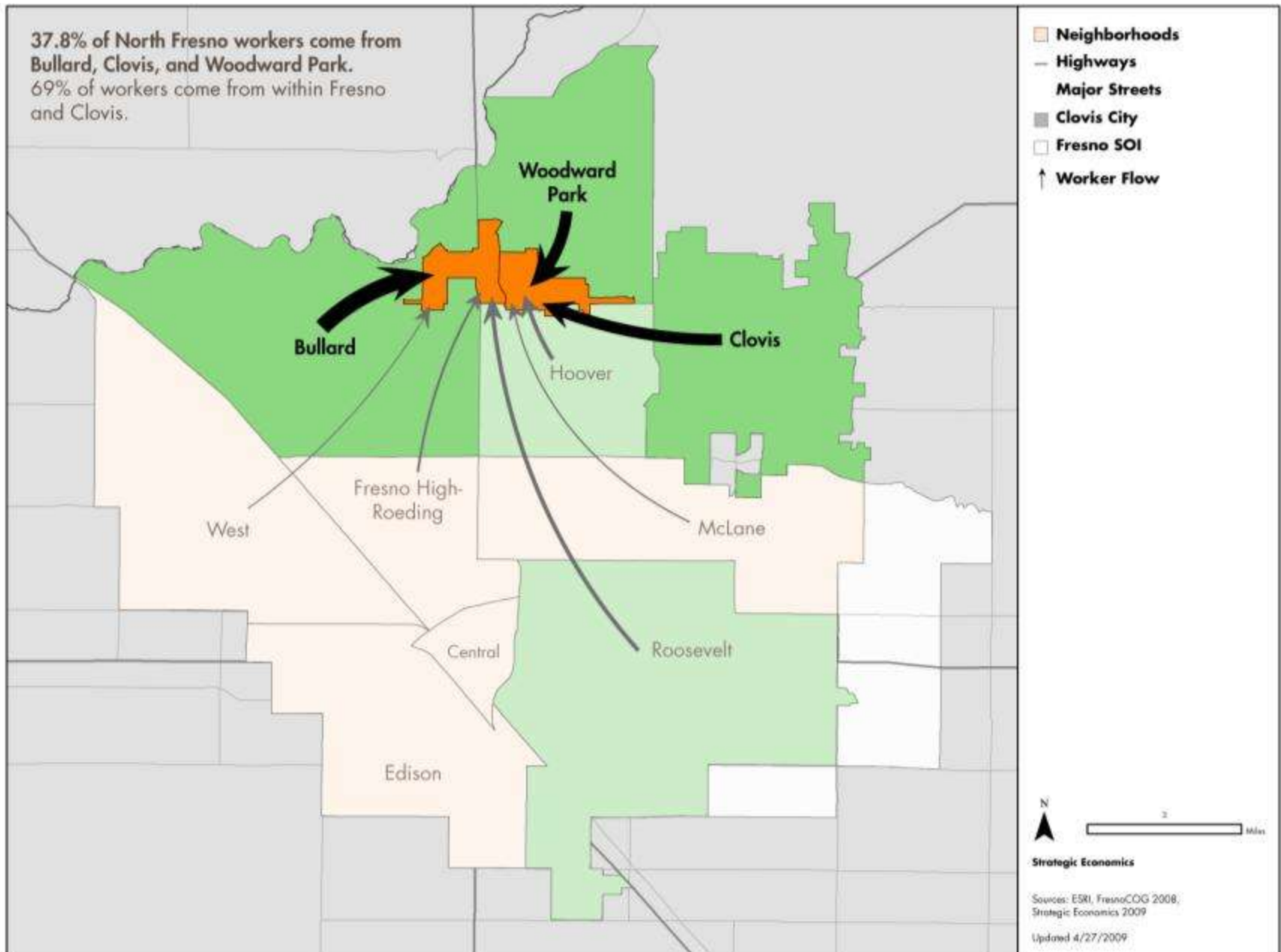
Top Fresno Job Center Destinations, with Median Neighborhood Income



Where Downtown Fresno Workers Live



Where North Fresno Workers Live

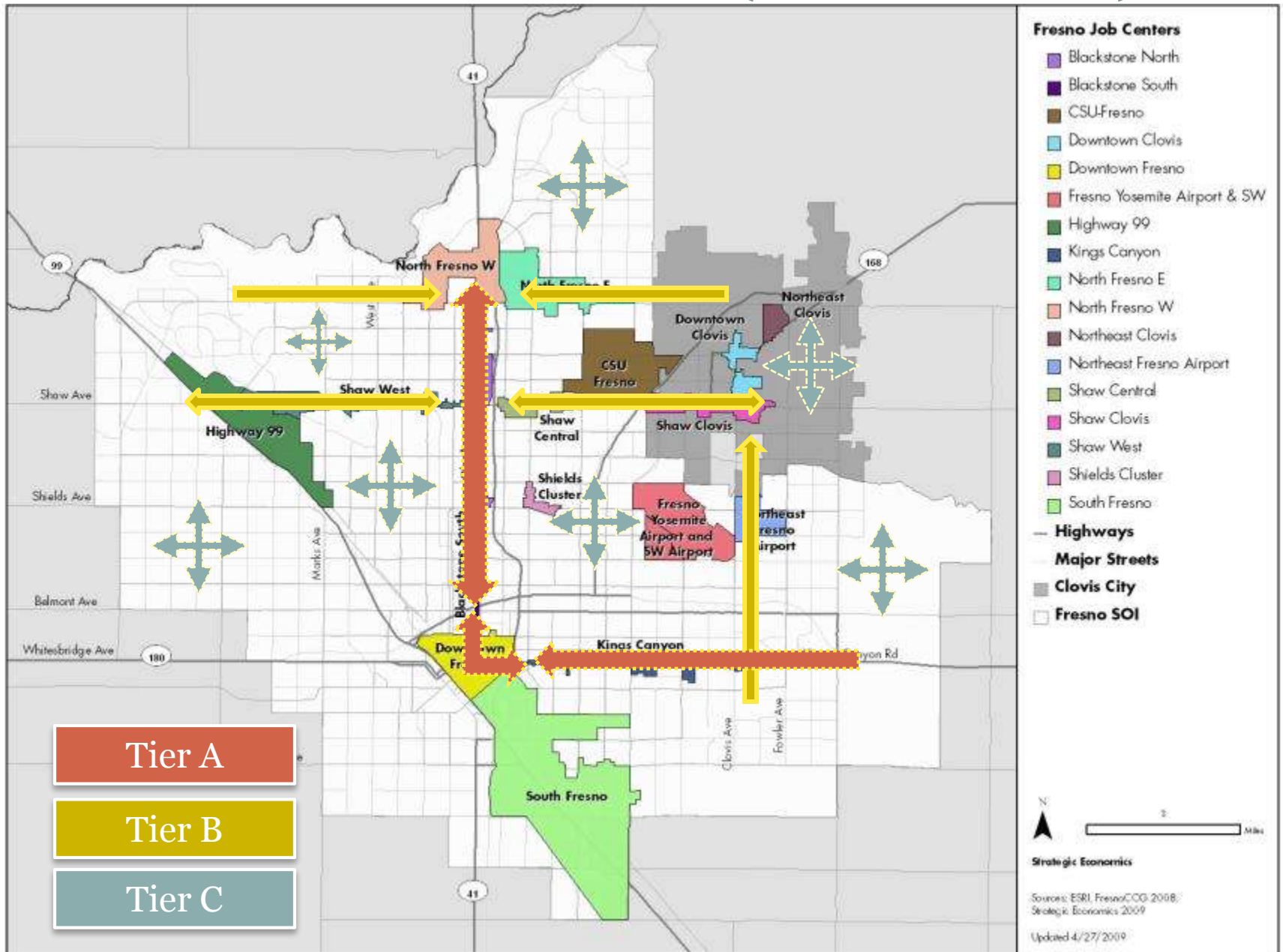


Job Center Profile: Major Findings



- 4 of 6 top job destinations are in northern Fresno
 - These four are also gaining employment
- Concentration of knowledge-based workers AND jobs to the north
- Yet, north areas also major destinations for residents in southern Fresno
- Downtown is a major destination for all parts of Fresno/Clovis

Recommended Transit Priorities (From the Economist)



III. Demand for TOD / Transit



Demographic Overview



Compared with California, Fresno County residents:

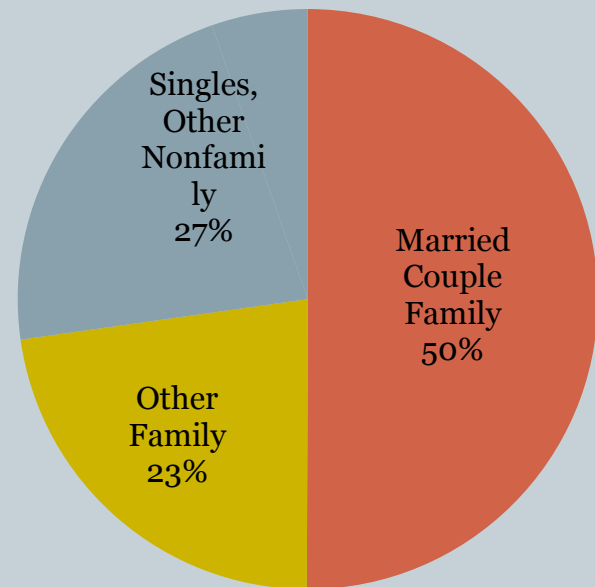
- Earn less on average
(*\$45k vs. \$58k Median HH Income in 2005/7*)
- Are less likely to have a Bachelor's Degree (*19% vs. 29%*)
- Are more likely to have children (*45% vs. 39%*)
- Are less likely to be in single person households
(*22% vs. 25%*)
- Are more likely to be Hispanic (*48% vs. 36%*)

Countywide Household Profile



- Half of Fresno County households are married couples
- Nearly 45% of all households have children, vs. 33% nationally
- Single person HH make up more than 20% of all households
- 60% of households own their own home

Fresno County Household Distribution, 2000



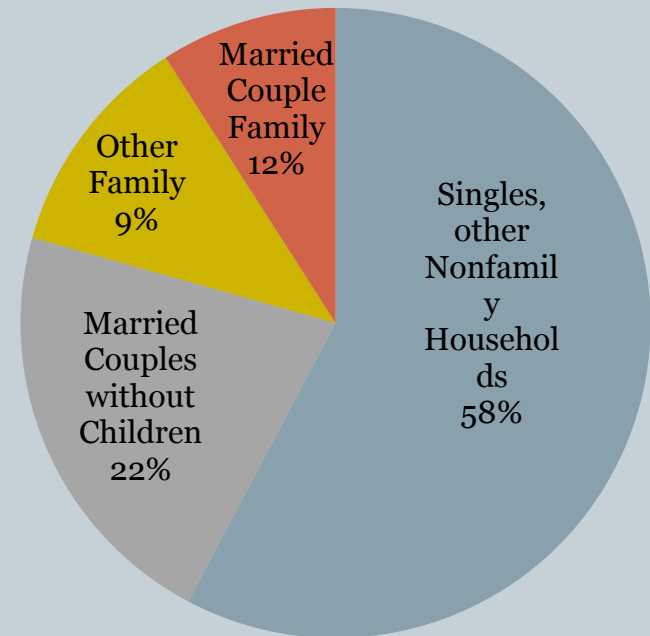
National Trends in Transit and TOD



Household Types and TOD

- 2030: Demand among over 15 million households nationally
- Singles, couples without children, nonfamily households have greatest demand
- Households over 65 also have strong demand

National TOD Demand Household Distribution



Fresno County Growth Forecasts



- 2007-2035: Number of Households will nearly double (85% increase)
- Faster growth among Households over 65

Projected Growth Among Senior Households

	2007	2035	Change	% Growth
Households	282,100	521,200	239,100	85%
Households with Head Over 65	51,700	128,700	77,000	149%
Share	18%	25%	32%	

Fresno County Growth Forecasts



- Higher incomes among households age 35-64
- Lower incomes among households 65 and older

HH Income by Age, 2035



Projected Growth: Household Types



- Housing unit mix – 45% of households have kids but 67% housing stock is single family detached
- Strong growth among families with children
- Slight increase in nonfamily households

Growth by Household Type, 2007-2035

	2007	2035	Change	% Growth
Married-couple family:	141,600	259,300	117,700	83%
Other Family Households	63,100	112,900	49,800	79%
Householder living alone:	63,100	122,900	59,800	95%
Householder not living alone:	14,300	26,100	11,800	83%
Total	282,100	521,200	239,100	85%

TOD Demand



- 14% of Households will have potential demand for TOD
- About 73,000 Total Households

Projected Demand for TOD, Fresno County, 2035

	2007	2035	Change	Assumed TOD Share	TOD Demand
Married-couple family:	141,600	259,300	117,700	10%	26,000
Other Family Households	63,100	112,900	49,800	15%	17,000
Householder living alone:	63,100	122,900	59,800	20%	24,600
Householder not living alone:	14,300	26,100	11,800	20%	5,200
Total	282,100	521,200	239,100	14%	72,700



Household and Job Growth: Findings

The good news

- There are destinations to support transit ridership
- Projected growth in sectors that will continue to support ridership
- Growth among singles + seniors will boost institutional ridership, TOD demand

The challenges

- Lots of families with children => greater preference for single family homes / driving
- “Drive till you qualify” mindset
- Economy is service-oriented rather than knowledge-based



Absorbing TOD Demand: Recommendations



- **Capturing higher demand for TOD requires:**
 - A quality transit system with high frequency service
 - Linkages to major job centers
 - A multidirectional system, offering access to both northern and southern activity areas

Absorbing TOD Demand: Strategies



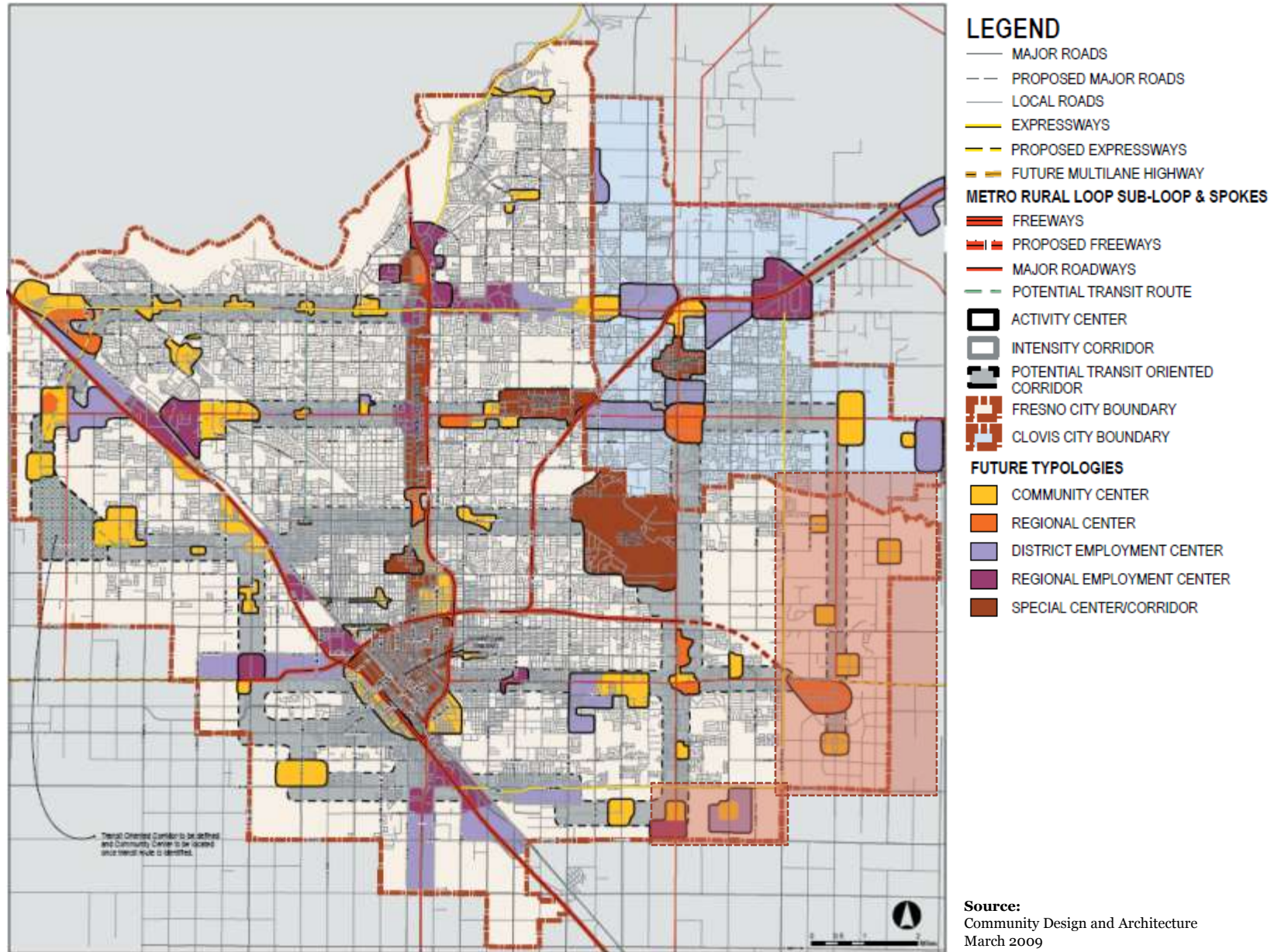
- Plan at a district, rather than project scale, to create full benefits of TOD
- Focus on one area at a time and develop a “pilot” neighborhood
- Understand your regional context
- Plan for a wide range of housing types



Synching with Other Planning Efforts

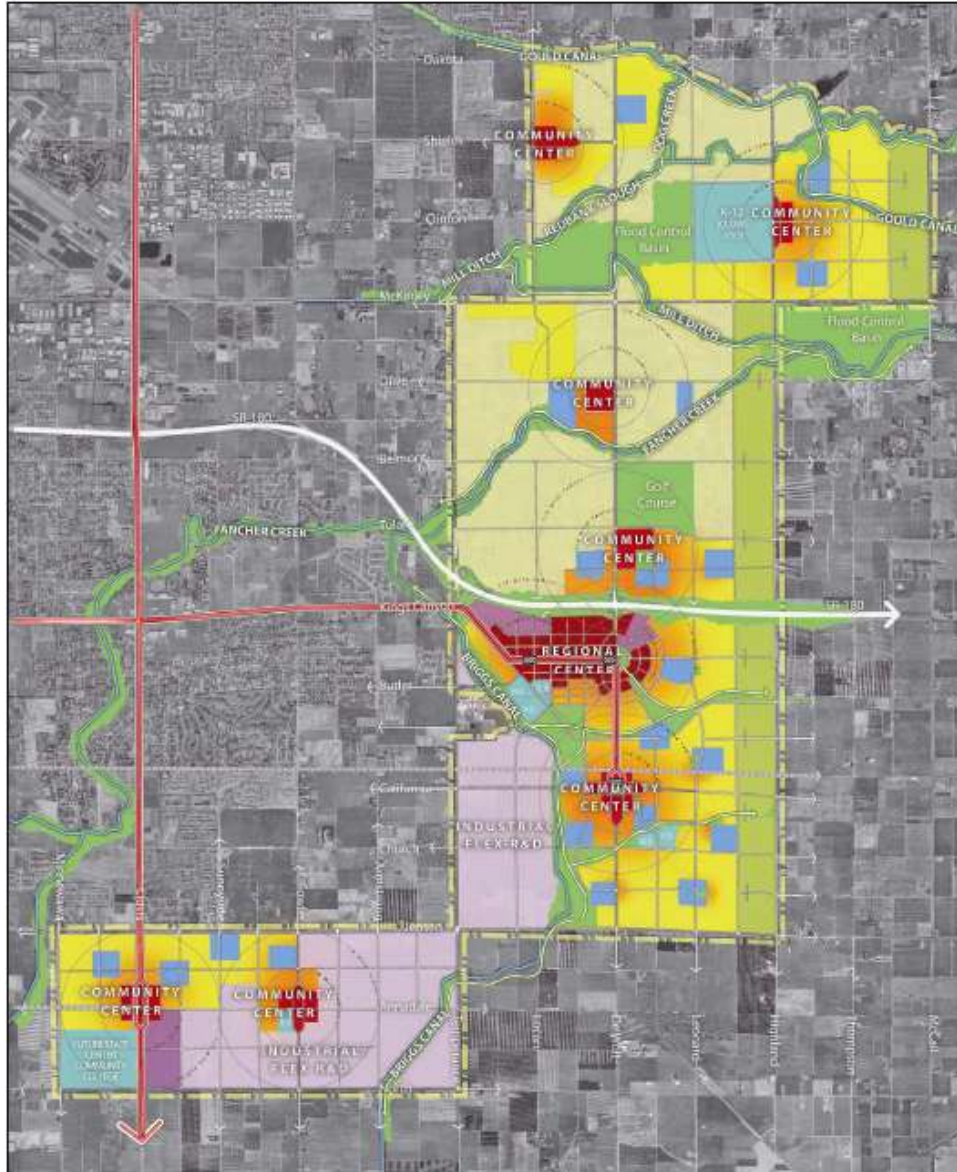


2050 Fresno Activity Centers and Transit Oriented Corridor Typologies



Map includes undeveloped places designated for future growth

Southeast Growth Area



LAND USE

-  Regional Center
-  Community Center
-  Neighborhood Center
-  Office/R&D Center
-  Industrial/Flex R&D
-  Institutional*
-  Mixed Residential
-  Neighborhood Residential
-  Rural Residential
-  Rural Cluster Residential
-  Parks/Open Space/Flood Control
-  Waterway

INFRASTRUCTURE

-  Highway
-  Transit Boulevard
-  Commuter Rail
-  Bike/Pedestrian Trail
-  Walking Radii
-  Transit Station
-  Planning Area Boundary

* Institutional includes the planned State Center Community College, the planned Clovis USD Education Center, the Senger USD Lone Star Elementary School, and new high and middle schools. It does not include the elementary schools and other civic uses in the SEG4 Plan, which are integrated into other Districts.



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Synching with Other Planning Efforts



- Activity Center Study and SEGA are long range visions
- Need for appropriate phasing and coordination to redirect growth
- Transit infrastructure phasing should consider these planning efforts

DISCUSSION

