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Meeting Objectives

Meeting Purpose

- To review the Existing Conditions and Trends Workbook and provide a summary of key findings
- To review recent community outreach for a vision for the future and discuss city assets, issues, and opportunities

Agenda

- Existing Conditions and Trends Workbook Overview
- Community Visioning Outreach
- Next Steps

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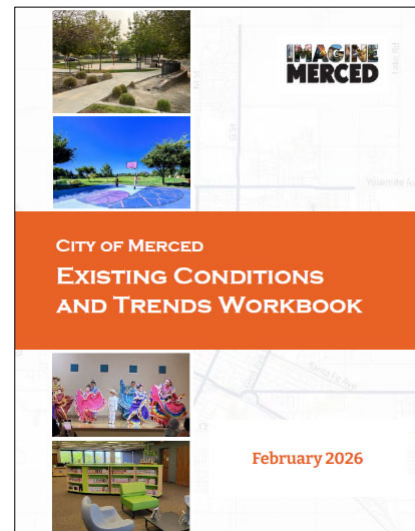
Existing Conditions and Trends Workbook

The Workbook is intended to be:

- A high-level snapshot of existing conditions based on recently published plans, reports, and data.
- A concise, engaging, and highly graphical analysis that incorporates infographics, charts, maps, and photographs.

The Workbook is informed by:

- Existing regional and local data
- Regional plans impacting or involving Merced
- CAFG, Planning staff, and community input



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Existing Conditions and Trends Workbook

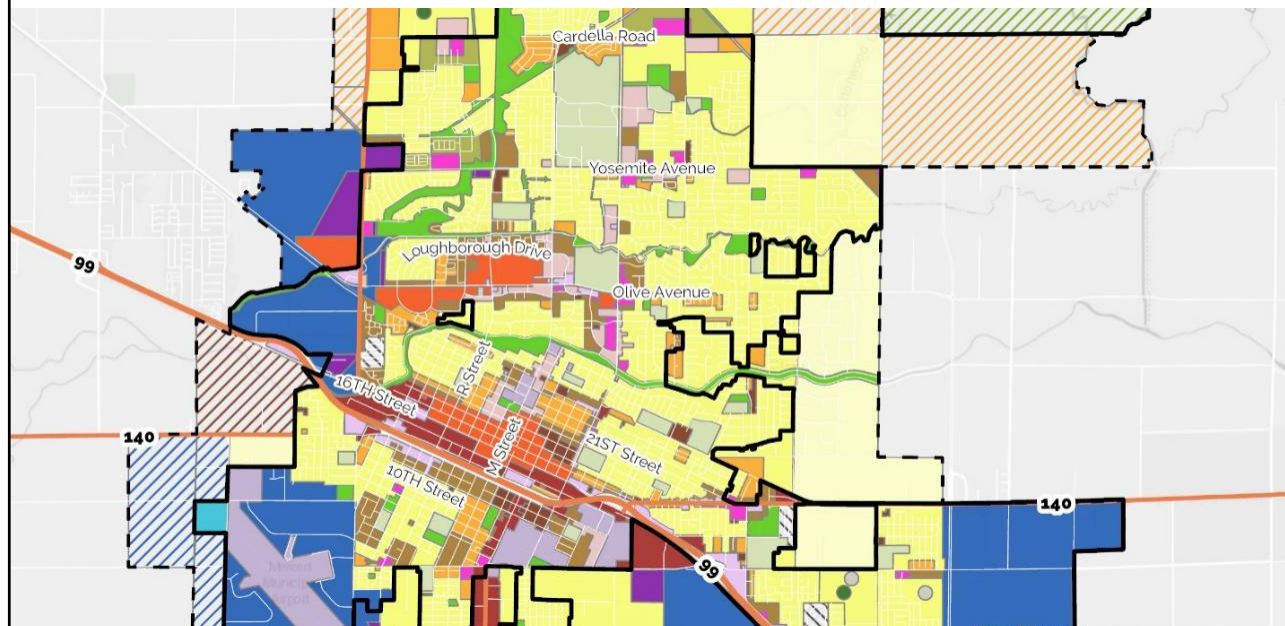
Contents

- | | |
|--|--------------------------------------|
| 1. Introduction | 7. Open Space, Parks, and Recreation |
| 2. Land Use and Community Design | 8. Air Quality |
| 3. Population, Employment, and Housing | 9. Environment |
| 4. Mobility | 10. Hazards and Safety |
| 5. Market and Economic Conditions | 11. Environmental Justice |
| 6. Public Facilities, Services, and Infrastructure | |

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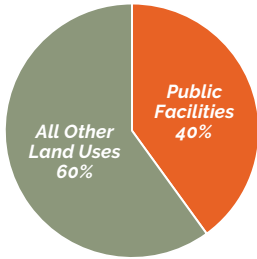
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2. Land Use



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2. Land Use



Existing Land Uses

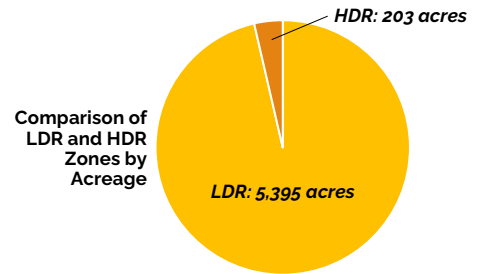
Public facilities account for nearly 40 percent of existing land uses according to the County Assessor's Office.

Existing 2030 General Plan Land Use

- Emphasized Low Density Residential (~22 percent) and High Density Residential (~15 percent)

Existing Zoning

- The Low-Density Residential (LDR) zone accounts for more than 32 percent of total acreage.
- The Planned Development zoning is well used (22 percent)



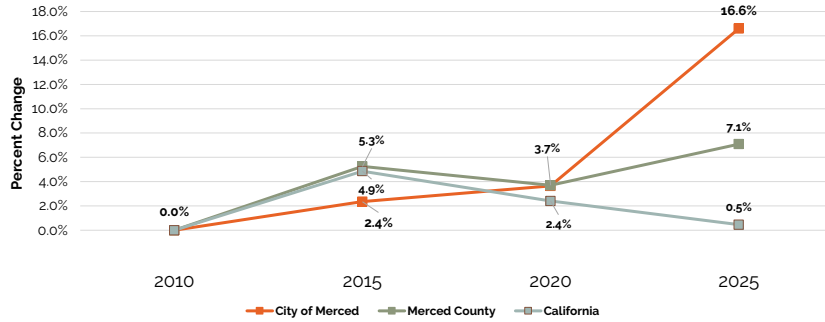
3. Population Employment and Housing



3. Population Employment and Housing

**2025 Population
Merced: 98,039**

Population Trends by Percent Change

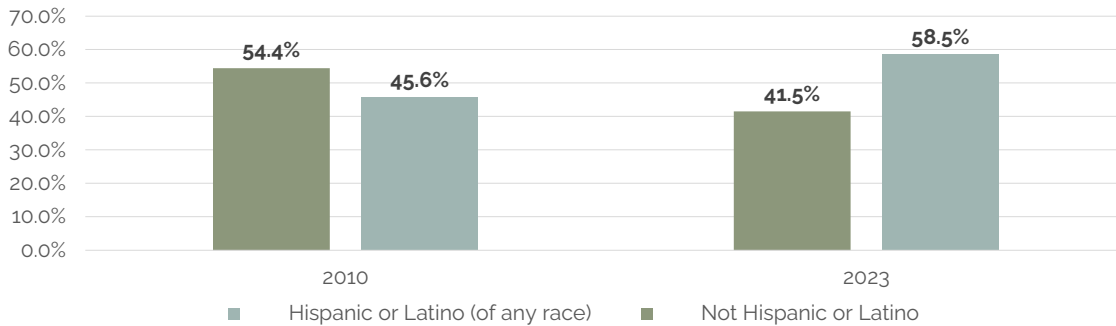


Population Trends, 2010-2025

| | 2010 | 2015 | 2020 | 2025 | Percent Change 2010-2025 | Annual Growth Rate |
|---------------|------------|------------|------------|------------|--------------------------|--------------------|
| Merced | 79,254 | 81,120 | 84,081 | 98,039 | 24% | 1.43% |
| Merced County | 250,699 | 263,885 | 273,661 | 293,080 | 17% | 1.05% |
| California | 36,637,290 | 38,421,464 | 39,346,023 | 39,529,101 | 8% | 0.51% |

3. Population Employment and Housing

Ethnicity, Merced, 2010 and 2023



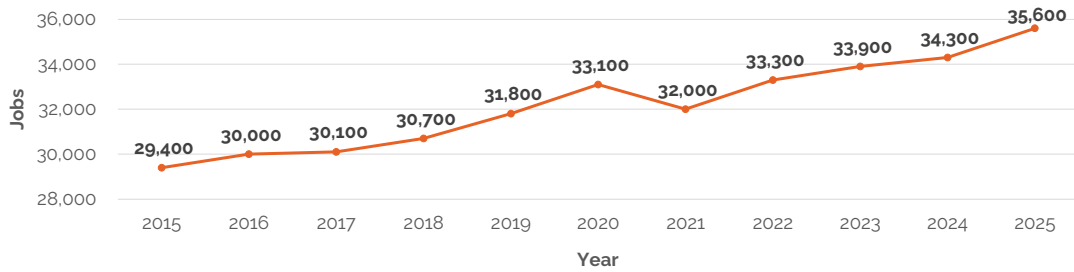
Source: U.S. Census Bureau, ACS, 5-year Estimates, Table DP03, 2010, 2023

3. Population Employment and Housing

Top Three Industries in Merced, by Number Employed

| Industry | Total | Percent |
|--|---------------|---------------|
| Civilian employed population 16 years and over | 35,750 | 100.0% |
| Educational services, and health care and social assistance | 9,267 | 25.90% |
| Retail trade | 3,940 | 11.00% |
| Arts, entertainment, and recreation, and accommodation and food services | 3,805 | 10.60% |

Employment, Merced, 2015-2025

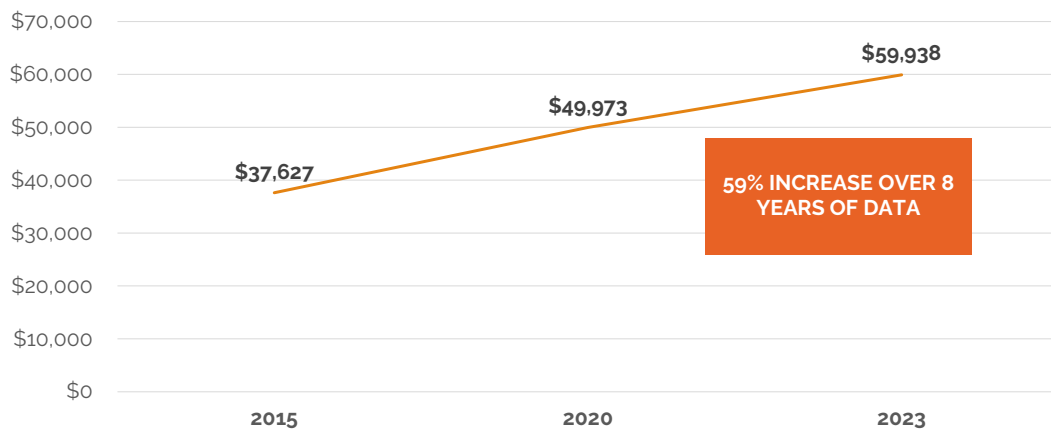


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3. Population Employment and Housing

Median Household Income (ACS 5-year)



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3. Population Employment and Housing

▪ Housing Mix



Single-Unit Detached Homes account for around 65 percent of the City's housing stock.

This is a lower percentage than the county (~74 percent) but greater than the state (~57 percent).



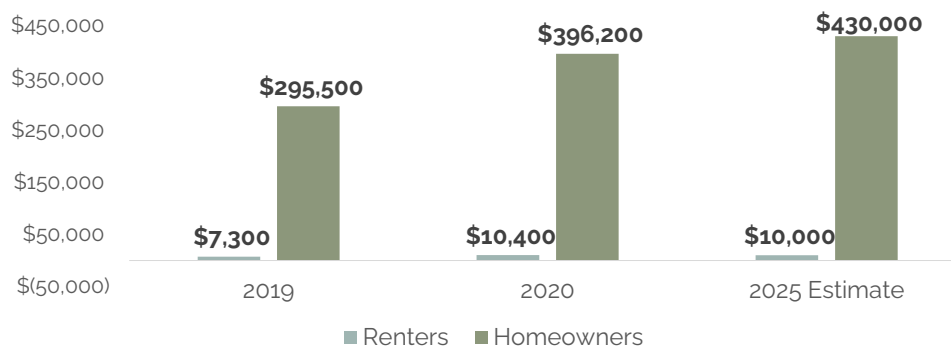
Large Apartments

Merced has a higher proportion of 20 or more-unit complexes (~6 percent) than the county (about three percent) but a significantly lower proportion than the state (over 13 percent).

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3. Population Employment and Housing

Median Net Worth by Tenure



AVERAGE HOME VALUE: City of Merced, Aug. 2025:

\$397,655

Source: Zillow Home Value Index

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4. Mobility



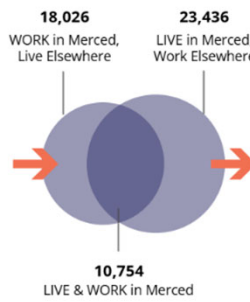
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4. Mobility

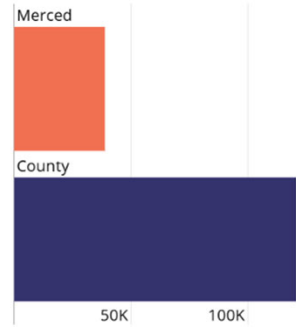
AVERAGE TRAVEL TIME TO WORK, City of Merced
2010: 20 minutes
2023: 27 minutes

AVERAGE WORKER VEHICLE OCCUPANCY, City of Merced
2010: 0.93 workers
2023: 0.99 workers

Labor Force Inflow & Outflow

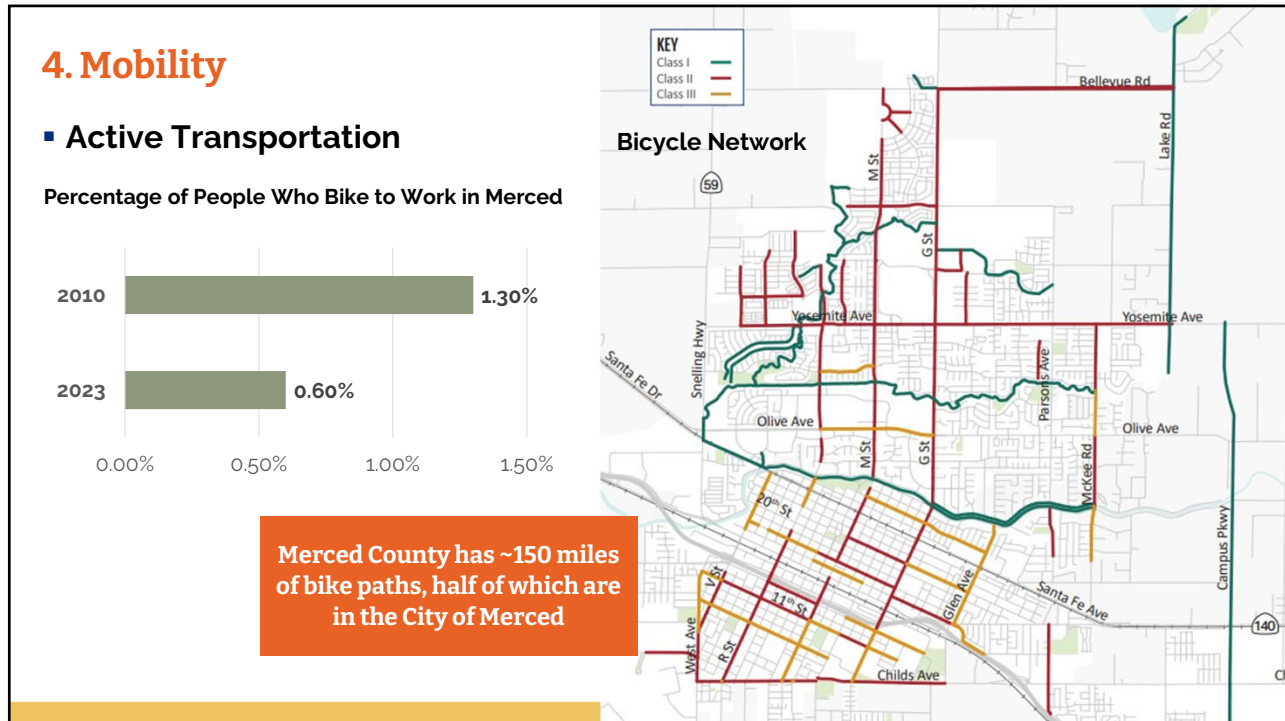


Regional Labor Force

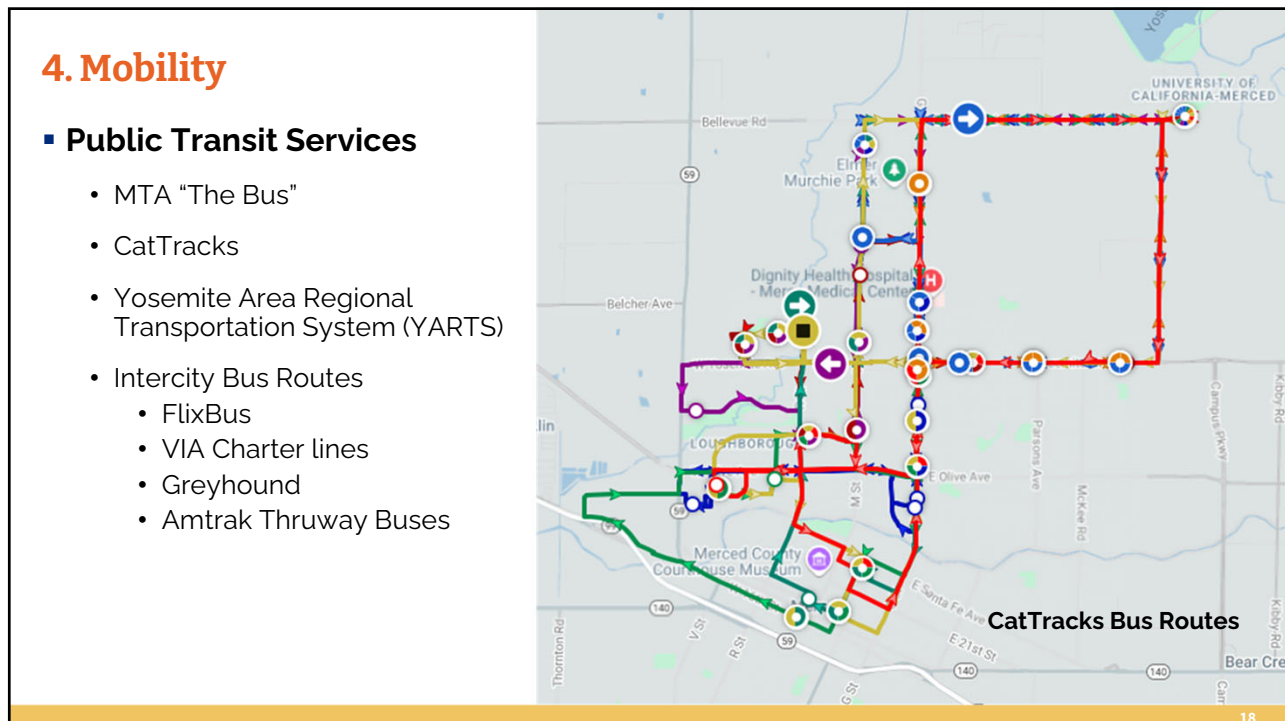


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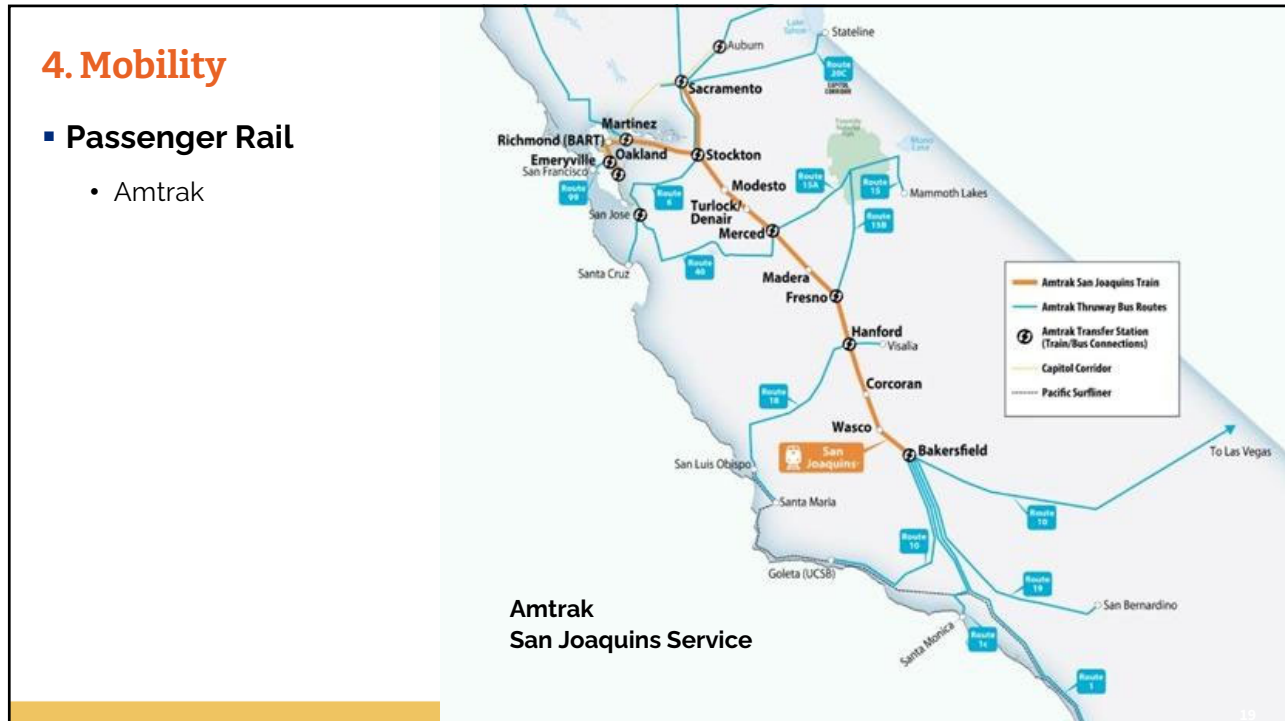


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4. Mobility

Passenger Rail

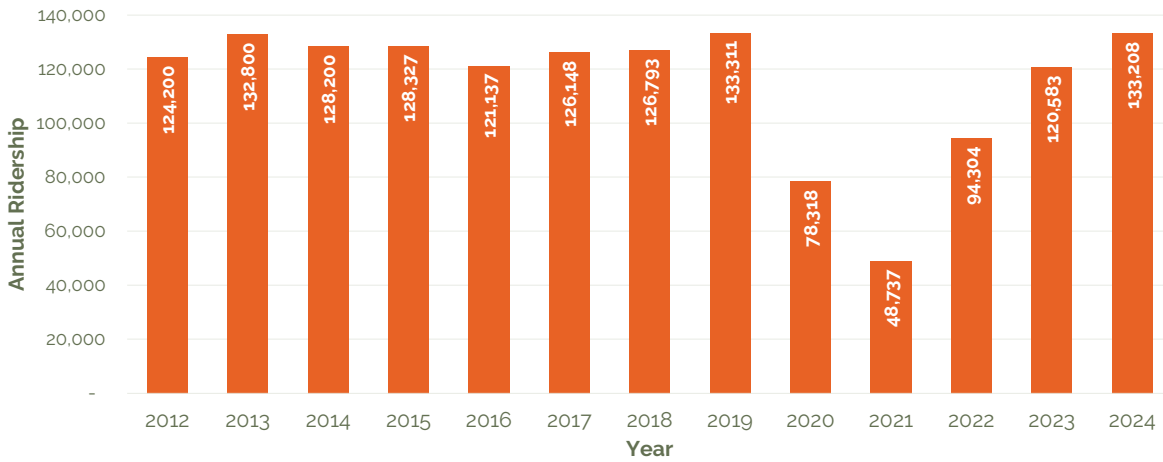
- Amtrak



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4. Mobility

Amtrak Annual Ridership Using the Merced Station



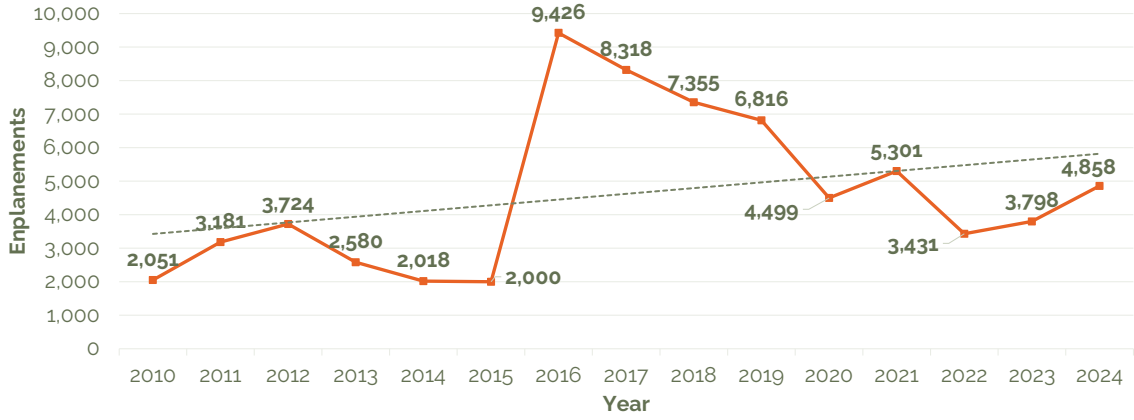
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4. Mobility

- **Aviation Facilities:** MACREADY FIELD (MCE, City); CASTLE AIRPORT (MER, County)

Enplanements at Macready Field (MCE)



5. Market and Economic Conditions



5. Market and Economic Conditions

Comparative Market Analysis

▪ Age and Housing Composition

- Merced has a young population with 45 percent of residents under age 25, compared to 36 percent in Modesto and 37 percent in Stockton.

▪ Commute and Work Behavior

- Merced has the shortest mean travel time to work (~26 minutes) when compared to Modesto and Stockton.

▪ Labor Market Conditions

- The unemployment rate in Merced is ~12 percent, higher than Modesto and Stockton.

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5. Market and Economic Conditions

Industry and Occupation Profile

- Merced has a higher concentration of employment in:

Education, healthcare, and social assistance (~26 percent), above both Modesto (~23 percent) and Stockton (~22 percent).

Government, at 21 percent, compared to 15 percent in Modesto and ~15 percent in Stockton.

Natural resources, construction, and maintenance occupations (15 percent) higher than Modesto (~11 percent) and Stockton (~12 percent).

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5. Market and Economic Conditions

Retail Sales and Economic Activity

- From 2015 to 2024, Merced's taxable retail sales increased by 37 percent, below both the county and state growth rates.
- Taxable sales per capita in 2024 are lower than in Modesto, Stockton, Merced County, San Joaquin County, and Stanislaus County.
- Retail sales performance is especially weak in categories such as motor vehicle and parts dealers and general merchandise stores, relative to state and cities of Modesto and Stockton.

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5. Market and Economic Conditions

Commercial Real Estate Market Overview

- **Retail Market:** Vacancy increased to ~6 percent in Q2 2025 (from ~5 percent the prior year); net absorption was negative for the second consecutive year.
- **Office Market:** Vacancy remains low at ~2 percent, though net absorption turned negative in the latest period.
- **Industrial Market:** Vacancy rose from ~14 percent to ~16 percent, with continued negative net absorption and modest rent increases.

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5. Market and Economic Conditions

Market Forecasts

Potential Demand for New Development

| Land Use Type | Existing Development (square feet) | Forecast Scenario (2025-2045) | |
|--------------------------|------------------------------------|-------------------------------|------------|
| | | Baseline | Aggressive |
| Office | 2,455,663 | +195,000 | +250,000 |
| Retail | 5,903,638 | +700,000 | +700,000 |
| Industrial | 5,572,961 | +550,000 | +735,000 |
| Residential – SF (units) | 19,292 | +7,237 | +7,237 |
| Residential – MF (units) | 8,607 | +3,930 | +3,930 |
| Hospitality (rooms) | 1,110 | TBD | TBD |

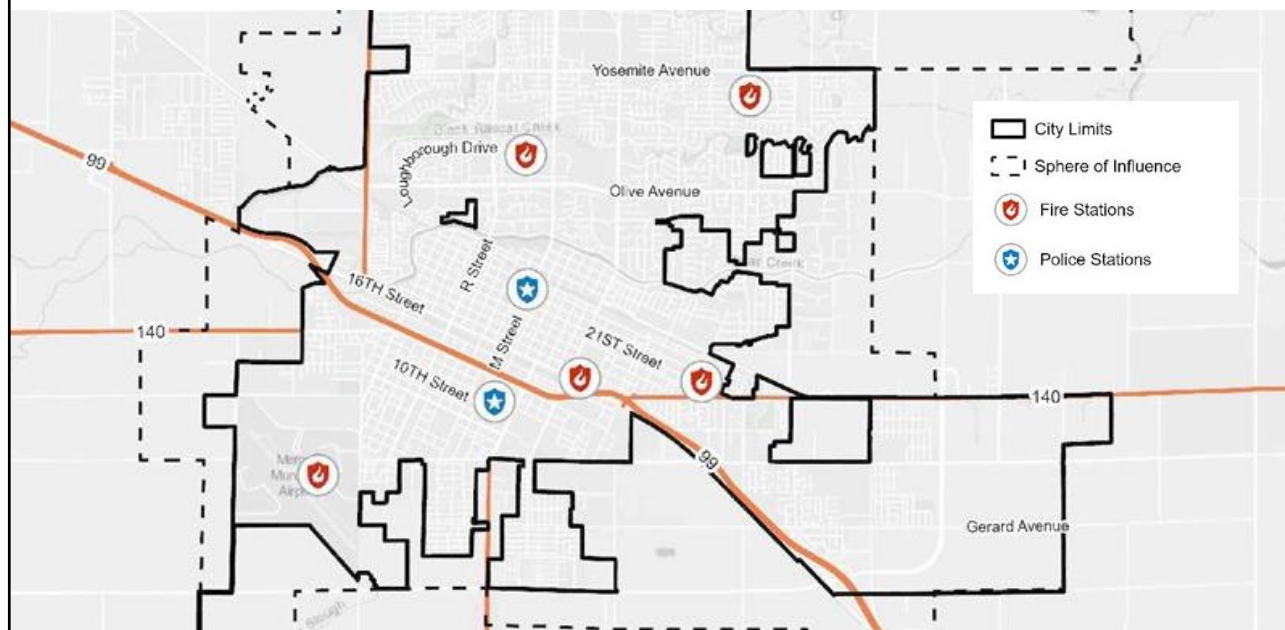
BASELINE SCENARIO

Assumes continuation of existing development trends.

AGGRESSIVE SCENARIO

Assumes increased demand for industrial and office uses.

6. Public Facilities, Services, and Infrastructure



6. Public Facilities, Services, and Infrastructure

▪ Water Supply and Delivery

- In 2020, the City supplied 20,076 AF of potable water and 4,050 AF of recycled water.
- Potable water demands are projected to increase to 31,825 AF by 2040 due to population increases, including the UC Merced population.
- The City's water supply is projected to sufficiently meet expected demands through 2040 assuming:
 - The installation of additional groundwater wells and
 - Construction of a 10 million gallon per day (mgd) surface water treatment plant by Merced Irrigation District by 2030

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6. Public Facilities, Services, and Infrastructure

LAW ENFORCEMENT

Merced Police Department

Personnel:

98 sworn

46 non-sworn

Operates from two stations in Merced

FIRE PROTECTION

Merced Fire Department

Service Area: 23 miles

85 sworn personnel

5 stations, 7 engines, 1 truck, 1 ambulance



Merced Police Department
Photo Credit: Merced Police Department

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6. Public Facilities, Services, and Infrastructure

Higher Education

- **UC Merced:**
 - Top-100 research university and the fastest-growing public university in the nation
 - On the cutting edge of sustainability in campus construction and design,
 - Supports high achieving and dedicated students from the underserved Central Valley and throughout California.
- **Merced College**
 - Enrollment: 11,839 students for the 2023/2024 school year.
 - About 41 percent of students are full-time
 - The most common areas of study are liberal arts and sciences, agricultural mechanics and equipment, and automobile mechanics technology

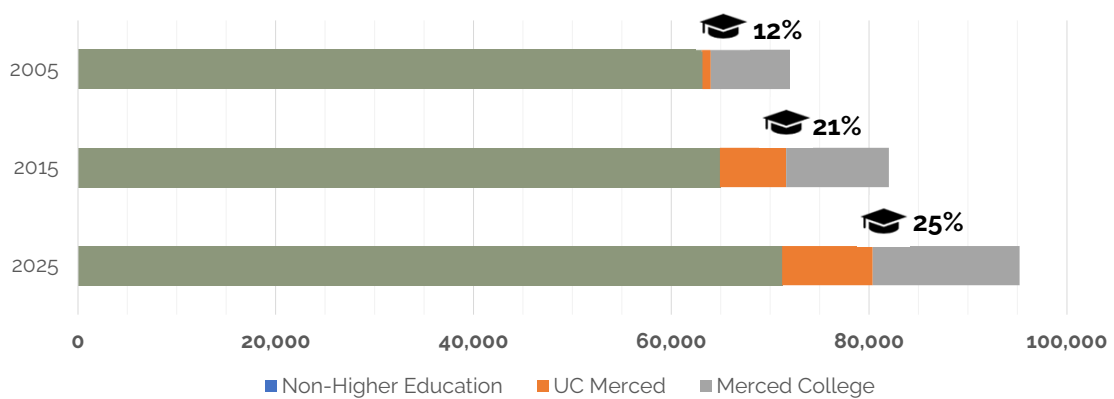
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6. Public Facilities, Services, and Infrastructure

Higher Education

Higher Education Population Over Time



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7. Open Space, Parks, and Recreation

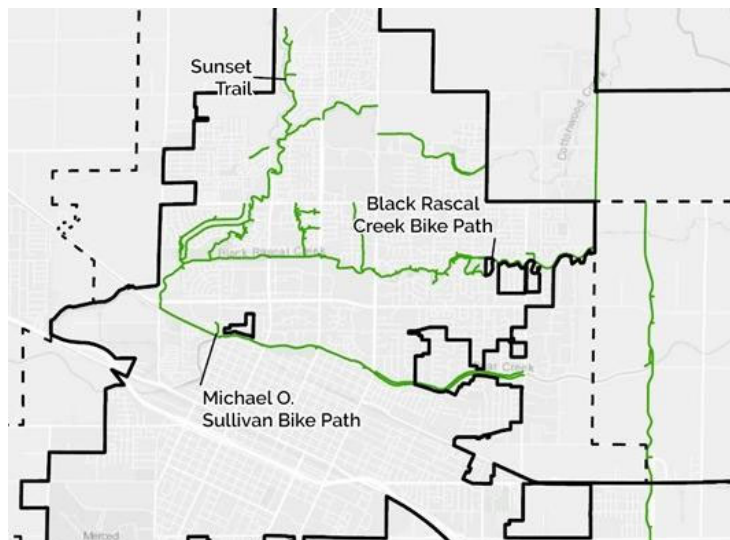


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7. Open Space, Parks, and Recreation

■ Trails

- Sunset Trail
- Michael O. Sullivan Bike Path
- Black Rascal Creek Bike Path



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7. Open Space, Parks, and Recreation

■ Parks

- 17 Mini-parks
- 14 Neighborhood parks
- 4 Community parks
- 3 Regional parks



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7. Open Space, Parks, and Recreation

■ Public Art

- Murals
- Painted utility boxes
- Gateway monuments
- Sculptures



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7. Open Space, Parks, and Recreation

■ Programming and Activities

Applegate Park Zoo

Senior Community Center

Youth and adult sports

Summer Camp

Classes



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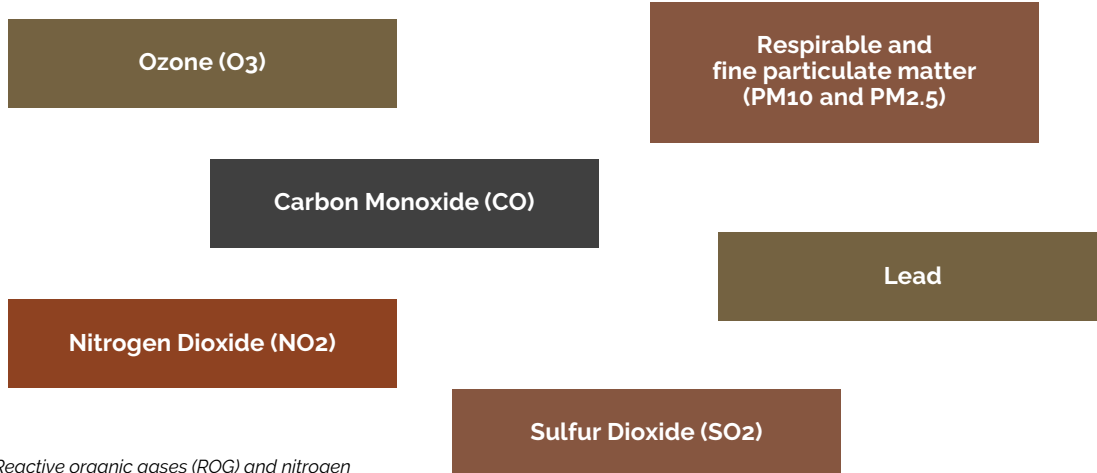
8. Air Quality



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8. Air Quality

▪ Air Pollutants of Concern



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8. Air Quality

San Joaquin Valley Air Pollution Control District (SJVAPCD) Attainment Status

| Pollutant and Averaging Time | Designation/Classification | |
|---|----------------------------|-------------------------|
| | State Standards | Federal Standards |
| Ozone (1-hour) | Non-attainment/Severe | Revoked ^a |
| Ozone (8-hour) | | Non-attainment/Extreme |
| Carbon Monoxide (CO) | Attainment/Unclassified | Unclassified/Attainment |
| Nitrogen Dioxide (NO ₂) | Attainment | Unclassified/Attainment |
| Sulfur Dioxide (SO ₂) | Attainment | Unclassified/Attainment |
| Respirable Particulate Matter (PM ₁₀) | Non-attainment | Attainment |
| Fine Particulate Matter (PM _{2.5}) | Non-attainment | Non-attainment |

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8. Air Quality

▪ Vulnerable Communities

- Merced includes several census tracts with CalEnviroScreen scores near 70 to 80, with some above 90, qualifying them as disadvantaged communities.
- Indicators for these communities generally contribute the most to their high percentile scoring experienced citywide

CalEnviroScreen 4.0 Percentile Scores Citywide Summary

| Indicator | Percentile Score |
|-----------------------------------|------------------|
| Exposure | |
| Ozone | 73 |
| PM _{2.5} | 88 |
| Children's Lead Risk from Housing | 66 |
| Diesel Particulate Matter | 61 |
| Drinking Water Contaminants | 66 |
| Pesticide Use | 38 |
| Toxic Releases from Facilities | 13 |
| Traffic Density | 44 |
| Sensitive Population | |
| Asthma | 93 |
| Cardiovascular Disease | 98 |
| Low Birth Weight Infants | 63 |
| Environmental Effects | |
| Educational Attainment | 77 |
| Housing Burden | 70 |
| Linguistic Isolation | 61 |
| Poverty | 87 |
| Unemployment | 88 |

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9. Environment

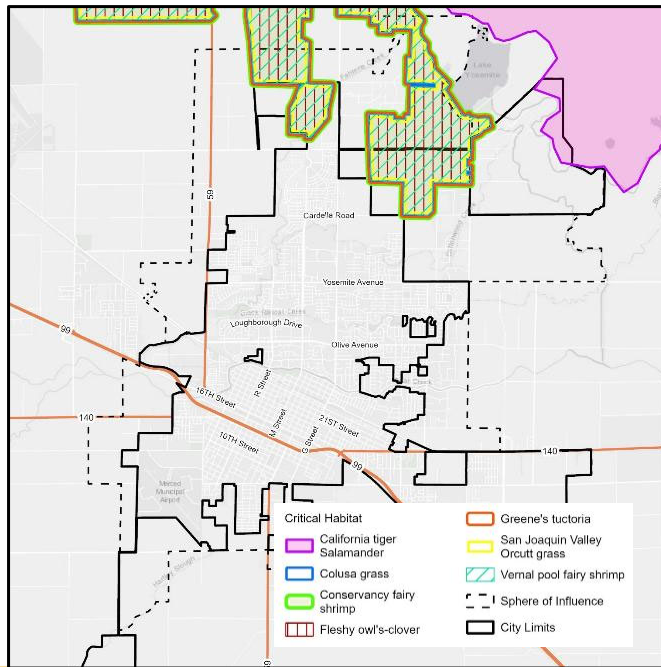


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9. Environment

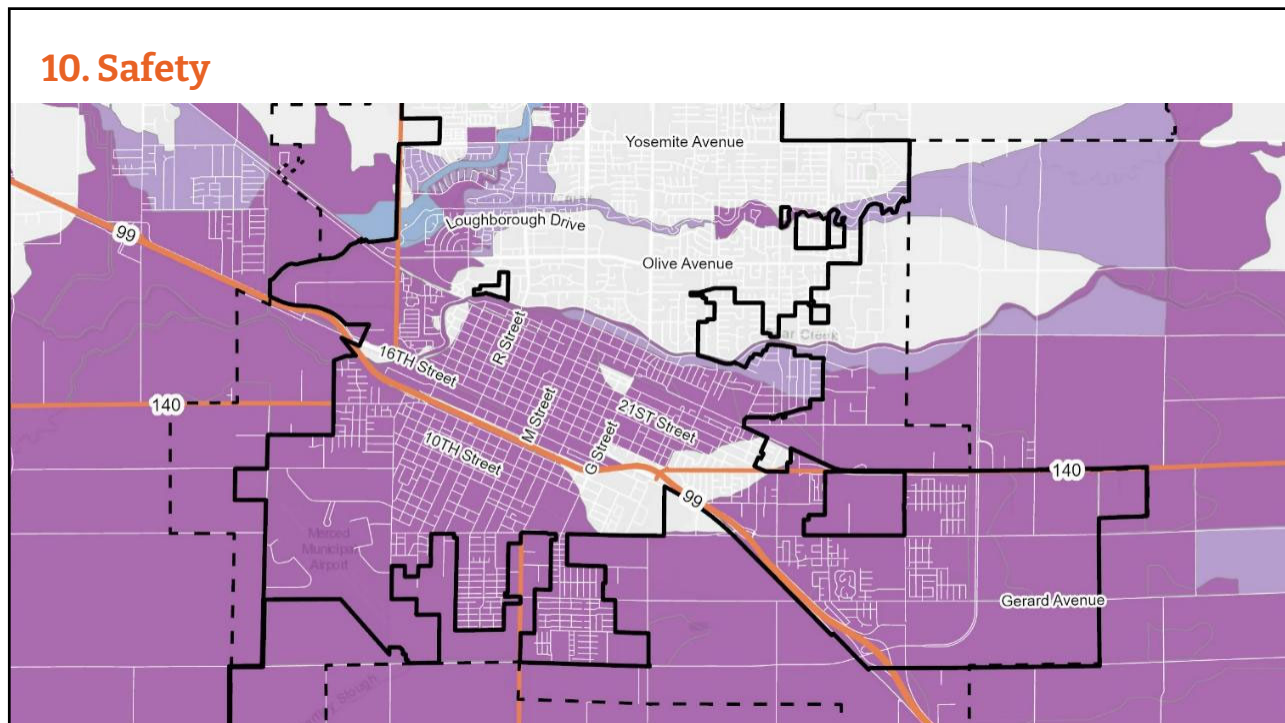
- **Water Resources**
- **Biological Resources**
 - Threatened, endangered, and special-status plants and wildlife
 - Sensitive habitats
- **Cultural Resources**
 - Historic sites
 - Tribal and cultural resources
- **Energy, Soil, and Mineral Resources**

Critical Habitats



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10. Safety

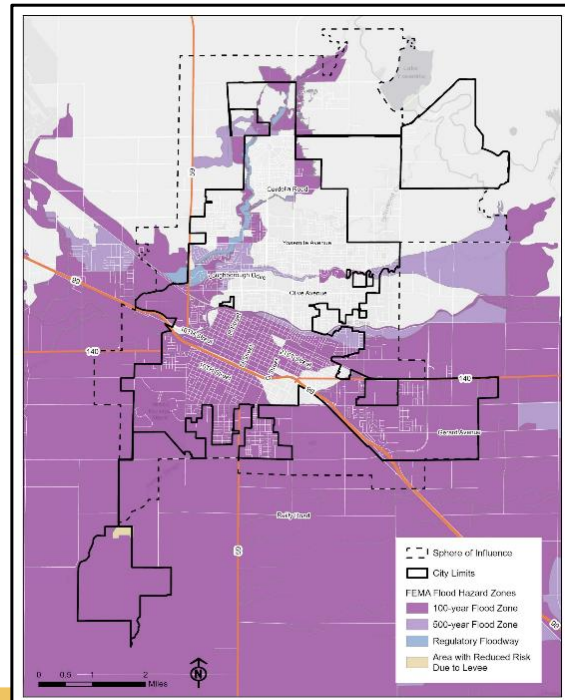


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10. Safety

- **Geologic and Seismic Hazards**
- **Fire Risks**
- **Climate Change**
- **Drought**
- **Extreme Heat**
- **Flooding**
 - Most of the southern portion of the city is within the 100-year flood zone

FEMA Flood Zones

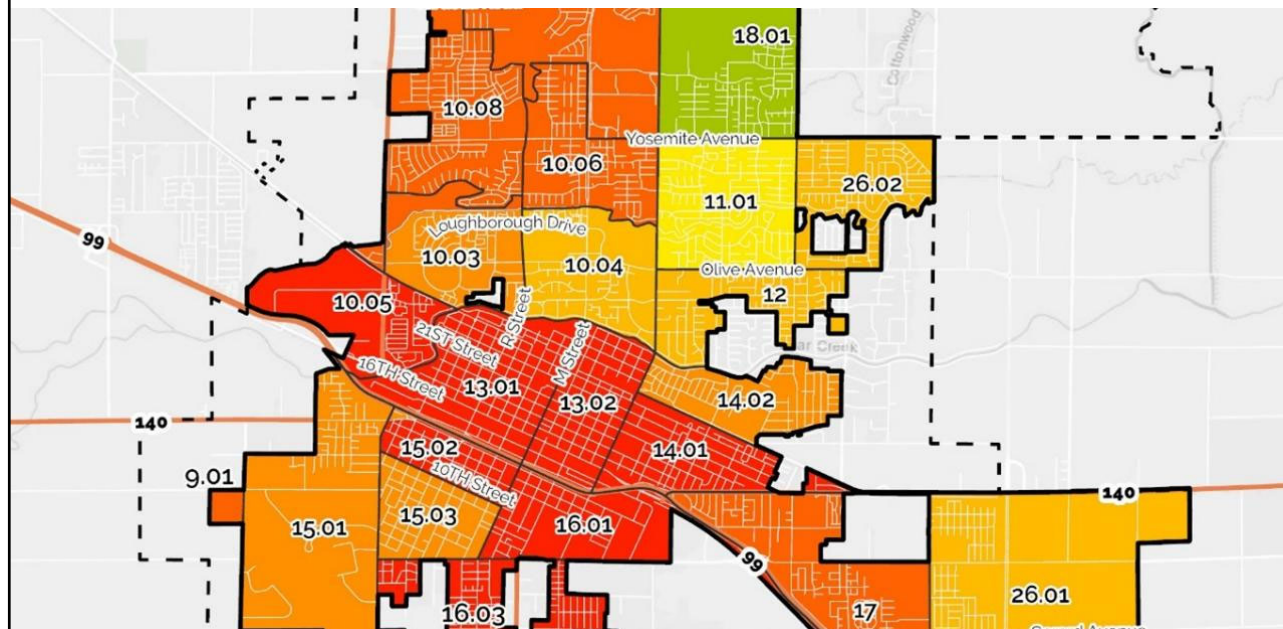


10. Safety

- **Noise**
- **Hazardous Materials**
- **Aviation Hazards**
- **Crime and Crime Prevention**
 - Crimes against people have increased in total since 2014; however, murders are down by 50%.
 - The total number of crimes against property is generally the same as in 2014; however, arsons have doubled.



11. Environmental Justice



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11. Environmental Justice

▪ What is Environmental Justice?

- Communities with disproportionately lower incomes, lower levels of education, and higher proportions of minority residents often bear a disproportionately large burden of exposure to environmental hazards and health risks.
- These conditions can often be traced back to a variety of factors, including underinvestment, inequitable land use and zoning practices, and fewer opportunities for public engagement.
- **Environmental justice seeks to minimize the effects of these hazards** for all people, regardless of race, ethnicity, or income level, **while improving access** to healthy foods, clean environments, safe housing, and accessible parks and recreational facilities.

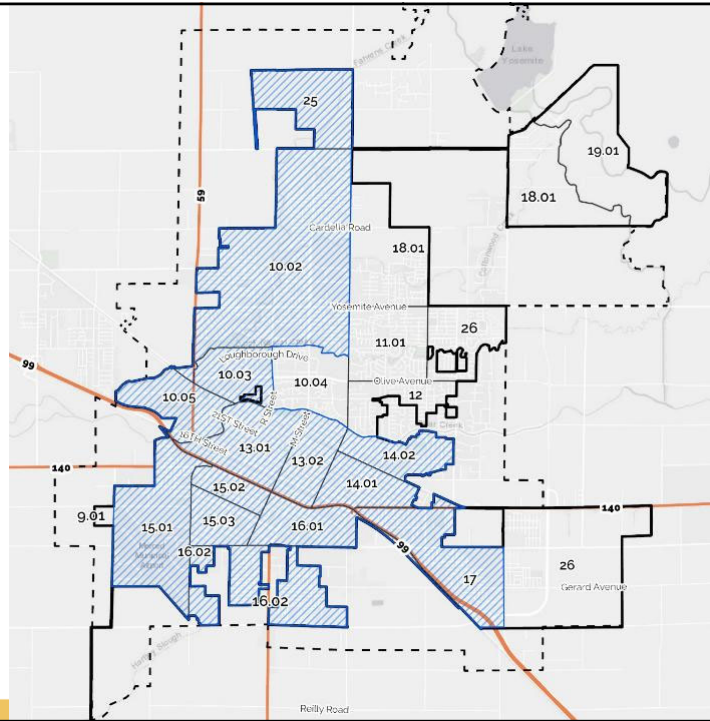
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11. Environmental Justice

- There are 14 census tracts in the city that fall within the top 25 percent of overall CalEnviroScreen 4.0 scores
- These 14 census tracts also have percentile scores within the top 25 percent of Statewide EJScreen environmental indicator scores.

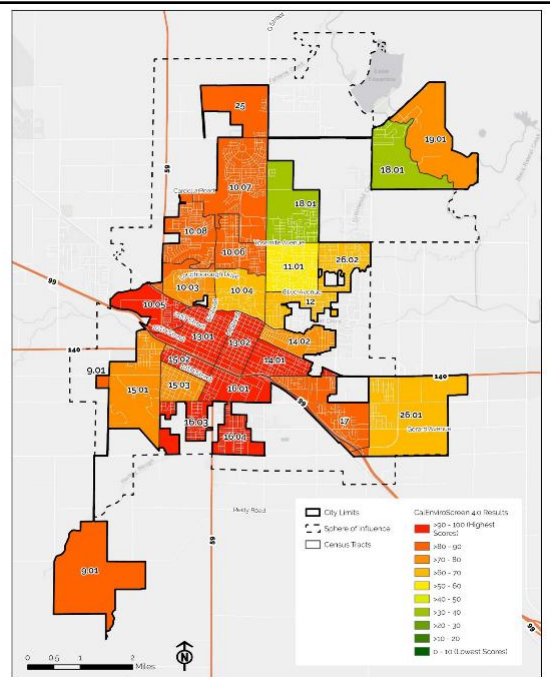
CalEnviroScreen 4.0:
Disadvantaged Communities



11. Environmental Justice

CalEnviroScreen 4.0: Merced Environmental Justice Communities

| Census Tract (2010) | Census Tract (2020) | CalEnviroScreen 4.0 Result |
|---------------------|--|----------------------------|
| 6047001302 (13.02) | No change | 98.2 |
| 6047001301 (13.01) | No change | 98.2 |
| 6047001601 (16.01) | No change | 96.9 |
| 6047001005 (10.05) | No change | 94.9 |
| 6047001502 (15.02) | No change | 93.8 |
| 6047001401 (14.01) | No change | 92.5 |
| 6047001602 (16.02) | 6047001603 (16.03) 6047001604 (16.04) | 92.0 |
| 6047001700 (17) | No change | 82.1 |
| 6047002500 (25) | No change | 80.8 |
| 6047001002 (10.02) | 6047001006 (10.06) 6047001007 (10.07) 6047001008 (10.08) | 80.4 |
| 6047001503 (15.03) | No change | 79.5 |
| 6047001501 (15.01) | No change | 77.2 |
| 6047001402 (14.02) | No change | 76.9 |
| 6047001003 (10.03) | No change | 75.9 |



Last updated: July 28, 2025

11. Environmental Justice

City edges

- **Pesticide use:** higher exposure risk in census tracts near the edges of the city.

Central Portions of the City

- **Traffic proximity:** higher exposure risk near freeways in the central portions of the city.
- **Lead Exposure:** highest in older homes, generally concentrated in the center of the city.
- **Language Isolation:** highest in central portions of the city

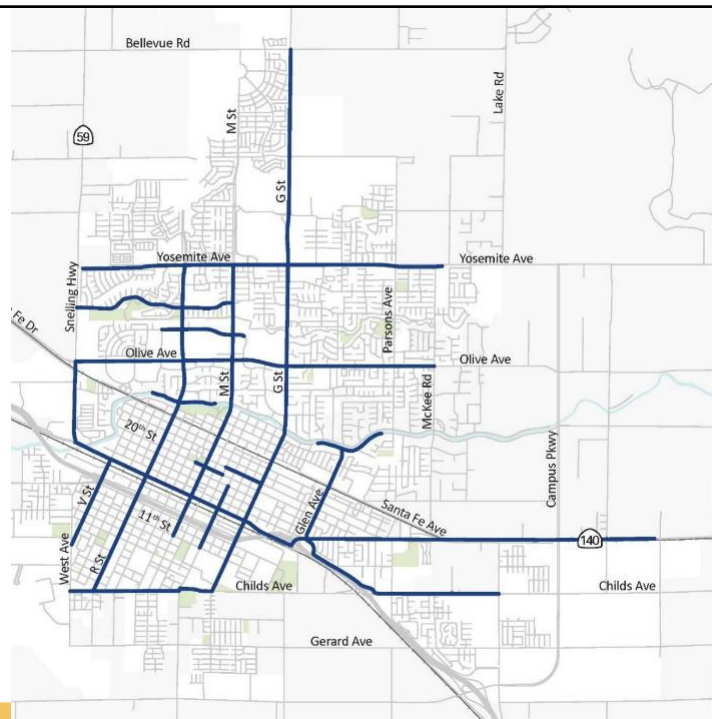
Southern and Central Portions of the City

- **Cost burden:** many low-income households in Merced are housing cost burdened, particularly those living in census tracts in the central and southern portions of the city

11. Environmental Justice

Local Roadway Safety

- The vast majority of collisions in Merced occur within disadvantaged areas, including 93 percent of all injury collisions and 90 percent of all Killed or Severely Injured (KSI) collisions.



High Injury Network



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Outreach Conducted

- **Community Open House #2**
- **Vision, Assets, Issues, and Opportunities Survey**
- **Community Advisory Focus Group Meeting #3**

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Community Open House #2

Wednesday, January 28, 2026, from 2 p.m. to 6 p.m.

- **Activities covered:**
 - Merced's strengths, issues, and opportunities
 - What residents would like to see in the city's future
 - Lessons learned from the past
- Over 50 attendees
- Activities available in English, Spanish, and Hmong

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Community Open House #2



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Community Open House #2



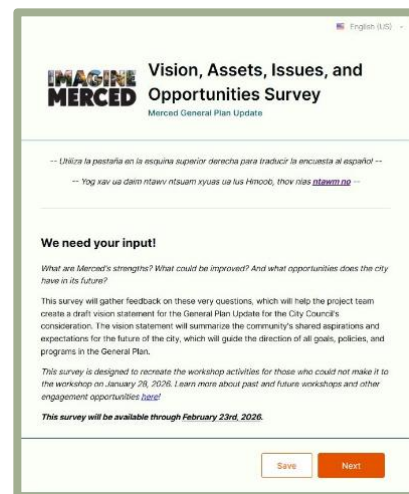
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Vision, Assets, Issues, and Opportunities Survey

Digital/Online Version of the Open House Exercises

- Mirrors activities for community members who were unable to attend Community Open House #2
- Available in English, Spanish, and Hmong
- Survey closed on **March 16th, 2026**



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CAFG Meeting #3

Wednesday, February 25, 2026 from 6:00 p.m. to 8:00 p.m.

- Similar discussion questions to those from Community Open House #2 activities
 - *What can be improved in the city?*
 - *What are Merced's strengths?*
 - *What new opportunities does the city have?*
 - *Lessons learned: What can we learn from Merced's past? What do you hope to see in Merced's future?*

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Feedback – Where does it lead?

- **Community Open House #2**
 - **Online Survey Responses**
 - **CAFG discussion**
- Draft a **vision statement** for the General Plan that:
 - Summarizes the community's shared aspirations and expectations for the future of the city, and
 - Guides the direction of all goals, policies, and programs in the General Plan
 - Initial draft vision statement will be presented to the CAFG **tomorrow, May 27th, 2026**, for discussion and refinement

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Critical Upcoming Dates

- **Planning Commission Meeting: Vision Statement**
 - City Council Chambers
 - Wednesday, August 5, 2026, at 6pm

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