

TECHNICAL PAPER:

Chico's Economic Center Mapping & Economic Performance Tool

Where economic activity occurs — and what it means for Chico's growth.

WHAT THE ANALYSIS TELLS US

ECONOMIC CENTERS

Chico's Economic Activity Is Organized Around Distinct Centers

Economic activity is concentrated in commercial, mixed-use, industrial, employment and special-purpose centers that perform different roles within the city and regional economy.

ECONOMIC GROWTH CAPACITY

Space for Future Economic Growth Is Limited in Key Areas

The mapping shows where Chico has — and does not have — land, buildings and infrastructure capacity for business expansion and future traded-sector and higher-value activity. This is particularly important for mid-market and growth-sector businesses that require suitable employment space.

MARKET & DEVELOPMENT OPPORTUNITY

Mapping Identifies Data Important for Future Economic Growth and Capacity

Trade areas, development sites, SPA/COS areas, infrastructure investments and other designations help identify where reinvestment, redevelopment and future economic activity can occur.

PLACE & VISITOR ECONOMY

Economic Assets Extend Beyond Traditional Business Centers

Destinations, outdoor recreation assets and future development opportunities can strengthen Chico's visitor economy and connect economic activity with place, recreation and quality of life.

CHICO ECONOMIC
VITALITY STRATEGY

ABOUT THIS PAPER

Uses the Economic Centers mapping and analysis to examine where economic activity occurs in Chico, the role each center plays, and how center-level information can inform economic development and investment decisions.

Mapping & Assessment Findings

Summary

The Economic Centers StoryMap, is a live, interactive map that allows us to visualize the different economic centers in the area, in combination with various assets and entities that influence economic vitality. The tool is designed to live beyond completion of the Chico Economic Vitality Strategy, supporting future actions with place-based data.

Visit StoryMap here: <https://tinyurl.com/chico-centers>

- 1. CHICO'S ECONOMIC ACTIVITY IS PHYSICALLY LOCATED AROUND DISTINCT “CENTERS.”** Economic activity is concentrated in commercial, mixed-use, industrial, and special-purpose locations that perform different roles within the city and regional economy.
- 2. THE GENERAL PLAN PROVIDES A FOUR-TYPE CENTER FRAMEWORK.** Neighborhood, Community, Regional and Special Purpose centers provide the planning foundation; the StoryMap adds a more detailed economic development and performance lens.
- 3. COMMERCIAL CENTERS ARE CENTRAL TO REGIONAL SPENDING CAPTURE.** They support retail, services, hospitality, small businesses, visitor activity and the customer-facing economy, but performance varies by place and market position.
- 4. INDUSTRIAL AND EMPLOYMENT CENTERS ARE CRITICAL TO FUTURE GROWTH.** They provide the physical capacity needed for manufacturing, traded-sector activity, business expansion, payroll growth and higher-value investment.
- 5. MAPPING INCLUDES VARIOUS DATA & DESIGNATIONS.** In addition to economic centers, the StoryMap contains 30-60 minute trade area radii, “destinations” for visitor attraction, fire risk, health, food, and federal-state area designations.

- The **30- and 60-minute drive time trade area** shows the Chico market reach. See the *Market Report: Chico Commercial Consumer Market* for further details on market data, consumer and buying associated with these drive times.
- **Local and regional destinations** support the visitor economy, as do the industries that serve visitors. The map features key CARD facilities and local locations such as BMX track, new aquatics center, soccer tournament fields, fairgrounds, new pump track, and areas outside of the city that contribute to the visitor economy in Chico, biking trails and the EBHB land envision as a sports campus.

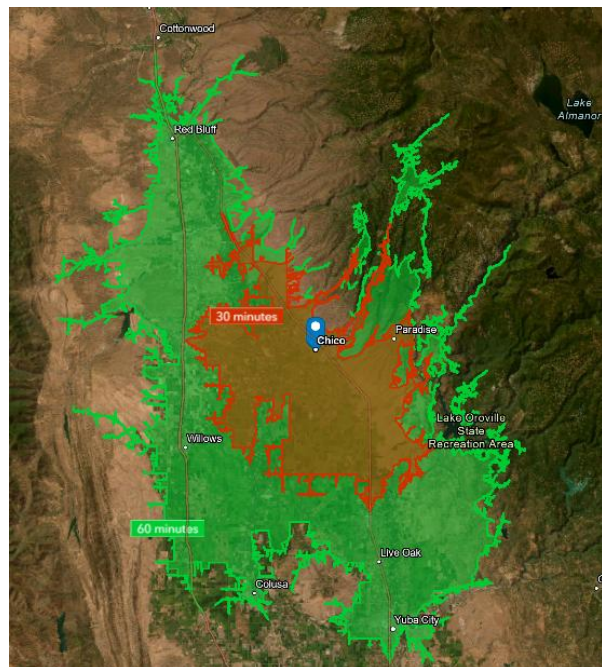


Figure 1: 30- & 60-Minute Drive Times from Downtown

- Designated **fire hazard zones** as defined by Cal Fire are mapped to show potential interface with existing businesses and centers. Most of the high and very high fire hazard zones are located along the east side of town.
- **Incentive areas** show where federal and state programs support funding for industrial, commercial and residential projects. The StoryMap showcases four federal programs and outlines their geographies on a map.

The StoryMap as a Living Economic Development Tool

The Chico Economic Centers StoryMap is intended to remain the current source for the center inventory and center-level performance indicators. Maintaining the data in the live map avoids creating a static appendix that becomes outdated as businesses open or close, centers reinvest, properties redevelop, and market conditions change. Over time, the StoryMap can continue to add or refresh layers. Current mapping includes:

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|--|--|---|
| • Center boundaries and economic role | • Industrial-employment land | • Planning designations SPA/COS |
| • Taxable sales and commercial performance | • Available buildings and development sites | • Economic or policy designated sites/areas at both local and state/federal level |
| • Trade areas and market demographics | • Capital projects initiated by the City for infrastructure improvements | |
| | • Destinations | |

LIVE RESOURCE: CHICO ECONOMIC CENTERS STORYMAP

[Open the current Chico Economic Centers StoryMap](https://tinyurl.com/chico-centers)

<https://tinyurl.com/chico-centers>

Introduction

The Chico Economic Centers analysis adds a geographic lens to the Chico Economic Vitality Strategy. It identifies the places where economic activity is concentrated and connects business activity, taxable sales, employment, industrial capacity, development opportunity and place-based conditions to specific areas of the city.

The *Economic Scan*¹ examines Chico through industries, businesses, jobs, payroll, economic output and regional market activity. The *Economic Centers StoryMap* complements that work by asking where those activities occur, what economic role each center performs, and how individual areas are changing over time.

The StoryMap is maintained as a live economic development resource. Because center boundaries, business activity and performance indicators change, the interactive StoryMap should remain the current source for center-level mapping and data. Click on the graphic below to access the live version of the Storymap.



¹ See Technical Paper: Economic Analysis

1. Purpose of the Economic Centers Framework

Economic development occurs in places. Businesses cluster around transportation access, customers, infrastructure, institutions, land, workforce and complementary activity. Looking only at citywide totals can mask important differences in performance between districts.

The Economic Centers framework provides a consistent way to organize and monitor Chico's major concentrations of economic activity. It is intended to help the City:

- Understand where economic activity is concentrated and the role each center plays.
- Identify market changes, investment activity, underperforming areas, development capacity and emerging opportunities.
- Target business retention, recruitment, small-business assistance, infrastructure, commercial revitalization and place-development efforts.
- Track center-level changes in business activity, investment and economic performance over time.

2. Chico's Centers: Planning Context and Economic Lens

Chapter 5. Community Design Element of the adopted Chico General Plan identifies four distinct types of centers: Neighborhood Centers, Community Centers, Regional Centers and Special Purpose Centers. The General Plan describes centers as destinations where residents and visitors shop, work, dine, seek services and entertainment, and recognizes that centers vary substantially in form and function.²

The General Plan's Community Design Element also establishes design principles for centers, emphasizing sense of place, pedestrian environments, landscaping, public art and landmarks. These principles recognize that commercial centers are more than places of business; their physical character, identity and attractiveness contribute to community vitality and the experience of residents and visitors.³

GENERAL PLAN CENTER TYPE	GENERAL PLAN ROLE	ECONOMIC DEVELOPMENT LENS
Neighborhood Centers	Smaller-scale, neighborhood-serving activity and daily needs.	Local-serving businesses, neighborhood vitality, neighborhood identity.
Community Centers	Broad range of services for residents citywide; examples include Downtown and the Safeway Center on East Avenue.	Commercial, civic, service and mixed-use activity; public gathering spaces, arts, streetscape and pedestrian experience.
Regional Centers	Wide range of uses serving both Chico and the greater region; examples include Chico Mall and North Valley Plaza.	Regional spending capture, retail, entertainment and services; gateways, wayfinding, landscaping and destination identity.

² Note: Chapter 5, Community Design center designations are complimentary to land use types described in *Chapter 3, Land Use Element*, within the General Plan. The focus of this work is specifically on centers creating economic activity.

³ General Plan reference: Community Design Element, Center Design, pp. 5-7–5-8; Goal CD-1 and Policy CD-1.2, p. 5-10.

Special Purpose Centers	Unique destinations serving local and regional needs; examples include Hegan Lane Business Park, CSU Chico and Enloe Medical Center.	Employment, higher education, healthcare, industrial and other specialized activity; campus identity connectivity, landscaping, gateways and public arts.
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For the Economic Vitality Strategy, these planning categories are translated into a practical economic development lens. The StoryMap organizes the city's major concentrations of activity around commercial and mixed-use centers, industrial and employment areas, and major institutional or special-purpose anchors. Some centers perform more than one role.

3. Commercial & Mixed-Use Centers

Commercial and mixed-use centers are the places where Chico captures a large share of resident, regional and visitor spending. They include regional shopping destinations, downtown and other business districts, neighborhood-serving centers, restaurants, hospitality, professional and personal services, entertainment, and concentrations of small and locally serving businesses.

Their economic role extends beyond taxable sales. Strong commercial centers contribute to business formation, entrepreneurship, customer activity, visitor experience, property investment, community identity and the overall competitiveness of Chico as a regional hub.

The physical environment is also an important part of a center's economic competitiveness. Landscaping, public art, wayfinding, pedestrian connections and gathering spaces can strengthen a center's identity, improve customer experience and support reinvestment. The General Plan's Community Design Element provides a policy foundation for evaluating these opportunities within individual economic centers, recognizing that each center has different characteristics and needs.⁴

Performance indicators for commercial and mixed-use centers may include taxable sales and sales trends, business mix, vacancy, reinvestment, customer draw, development activity, property utilization and changing market position.

4. Industrial & Employment Centers

Industrial and employment centers serve a different economic function. They provide the land, buildings, transportation access, utilities and operating environment required for manufacturing, production, distribution, logistics, business-to-business services and other traded-sector activity.

These areas are measured through employment, payroll, business concentration, investment, expansion activity, industrial land and building capacity, infrastructure readiness and the ability to support businesses that sell beyond the region and bring new dollars into Chico.

Hegan Lane Business Park is identified in the General Plan as a Special Purpose Center and illustrates the importance of protecting and preparing employment land for future business growth. The City's current Recycling Market Development Zone recruitment materials similarly direct prospective businesses to the Economic Centers and Corridors StoryMap for industrial areas, business districts, transportation assets and development opportunities.

⁴ General Plan reference: Community Design Element, Center Design, p. 5-8; Policies CD-3.2 and CD-3.3, p. 5-13; Goals CD-6 and CD-7, pp. 5-14–5-15



Industrial and employment centers are a strategic growth asset. Their performance is tied to current businesses **and** also to whether Chico retains sufficient investment-ready land, buildings and infrastructure for future traded-sector and higher-value activity.



5. Centers Perform Different Economic Roles

A commercial center may be economically strong because it captures regional spending and supports many small businesses. An industrial center may generate comparatively little retail activity while making a major contribution to jobs, payroll, business investment and economic output. Downtown combines commercial, civic, cultural, visitor, university-related and neighborhood functions. All are economically important, but for different reasons.

CENTER FUNCTION	REPRESENTATIVE INDICATORS	PRIMARY ECONOMIC CONTRIBUTION
Commercial / Regional	Taxable sales, business activity, customer draw, vacancy, reinvestment	Regional spending capture; small-business activity; services; visitor economy
Downtown / Mixed Use	Business mix, investment, activation, housing, visitor activity, property utilization	Civic, cultural, commercial, CSU-related and experience economy
Industrial / Employment	Employment, firms, expansion, land/building capacity, infrastructure readiness	Traded-sector activity, payroll, production, investment and economic output
Institutional / Special Purpose	Employment, service demand, related suppliers, investment, workforce activity	Regional anchors, talent, healthcare, education and specialized employment

6. Connecting Center Performance to the Economic Scan

The Economic Scan shows future employment and real economic output growth are forecasted to be below healthy long-term benchmarks. It also shows that taxable sales remains an important measure of Chico's regional market role and that higher-value business activity, productivity and investment will be important to strengthen future performance.

The Economic Centers framework translates those citywide findings into place-specific geographies. It helps the City determine where commercial activity is strongest, where industrial capacity exists, which districts are changing, and where infrastructure, business assistance, redevelopment or investment efforts could have the greatest impact.

The framework also provides a way to connect the City's industry and business strategies with physical locations. Anchor employers, traded-sector businesses, small businesses, visitor activity and enabling industries all operate within places that have different market conditions and development capacity.

Center-level analysis can also identify opportunities for targeted place improvements. Evaluating commercial centers against the General Plan's Community Design principles could help prioritize landscaping, streetscape enhancements, public art, wayfinding and pedestrian improvements that strengthen each center's identity and support business activity.

7. Key Indicators for Center Performance

The performance indicators for each of the centers is shown in the table below. The centers are ranked in order of highest to lowest for sales tax generation based on HdL sales tax data collected for calendar year 2025.

CENTER	STRENGTH/WEAKNESS
East 20th Street 2025 Sales Tax⁵: \$3,641,239 % Change 2024-25: 0.6%	STRENGTH — REGIONAL DRAW Target and WinCo Foods are in the 80 th percentile nationwide based on number of visits. WEAKNESS — AGING MALL The Chico Marketplace has multiple tenant spaces available and keeping indoor malls economically viable is a challenge.
Sierra Nevada/Costco 2025 Sales Tax: \$2,378,016 % Change 2024-25: 0.1%	STRENGTH — REGIONAL DRAW Sierra Nevada is an international draw for visitors. Costco shoppers are traveling from the greater Butte County region. WEAKNESS — MULTIPLE VACANCIES There are at least 5 tenant spaces available at Chico Crossroads; including adjacent former 36,540 SF Chico Enterprise Record.
Esplanade 2025 Sales Tax: \$2,010,988 % Change 2024-25: 70%	STRENGTH — SALES TAX BOOM Esplanade has seen a 70% increase in sales tax generation from 2024-2025. HdL could investigate sources of increase. WEAKNESS — MULTIPLE VACANCIES Several vacant/underdeveloped parcels along the Esplanade frontage.

⁵ HdL Sales Tax Data, Customize Analysis, July-August 2026

CENTER	STRENGTH/WEAKNESS
Skypark Plaza 2025 Sales Tax: \$1,663,394 % Change 2024-25: 1.2%	STRENGTH Butte College Skyway Center is an attractor for college students. National retailers Lowe's, TJ Maxx and Home Depot are regional draws. WEAKNESS — ABUNDANCE OF PARKING Visual analysis and site tours show an overabundance of parking. This also represents an opportunity for development of retail pads.
Downtown 2025 Sales Tax: \$1,392,762 % Change 2024-25: -4.7%	STRENGTH Downtown is vibrant with mom & pop shops, events, and connectivity to adjacent neighborhoods and Bidwell Park. Largest concentration of businesses, professional, personal, restaurants hub, retail and civic center. Anchored by CSU. Historic, arts and culture. WEAKNESS — VACANT BUILDINGS, CHALLENGE – HISTORIC OVERLAY, OLDER BUILDINGS Several concentrated properties available—Salem St. - 3 rd -4 th St., Main St - 2 nd -3 rd St. Gives impression of higher vacancy than numbers show.
The Wedge 2025 Sales Tax: \$1,146,247 % Change 2024-25: 54.8%	STRENGTH Ample opportunities for industrial flex space. Significant jump in sales tax generation from 2023 to 2025 (\$600k+ increase) WEAKNESS Area has varied light industrial-commercial uses. No sense of arrival.
Park Avenue Industrial 2025 Sales Tax: \$1,010,325 % Change 2024-25: -1.7%	STRENGTH A-Main Hobbies is a significant sales tax generator for the City. Center is well-positioned to support light manufacturing and industrial uses. WEAKNESS Existing auto salvage yards occupies significant acreage.
North Esplanade 2025 Sales Tax: \$958,673 % Change 2024-25: 1.3%	STRENGTH Substantial sales tax generators for area. New car dealership. The new CARD Aquatic Park is under construction and set to open in 2027.
Mangrove Avenue 2025 Sales Tax: \$938,021 % Change 2024-25: -4.6%	STRENGTH General commercial and personal services to support adjacent neighborhoods. Safeway fueling center appears to be largest contributor to sales tax for corridor. WEAKNESS Dated and unattractive commercial centers and buildings along corridor.
North Valley Plaza 2025 Sales Tax: \$813,746 % Change 2024-25: -0.4%	STRENGTH The portion of North Valley around the Trader Joe's is renovated and an attractive center. The Dollar Tree is 97 th percentile for visits nationwide. WEAKNESS The area closer to Highway 99 has a vacant K Mart in need of renovation or demolition. Vehicle circulation around the plaza is tricky.
Hegan Lane Business Park 2025 Sales Tax: \$769,447	STRENGTH Hegan Lane is defined as a true business park, with more clearly defined boundaries. Potential to develop 40+ acres available for industrial build out.

CENTER	STRENGTH/WEAKNESS
% Change 2024-25: -58.3%	WEAKNESS Sales tax generation has dropped significantly over the last four years. Further HdL analysis is needed to determine factors.
Skyway Industrial 2025 Sales Tax: \$542,051 % Change 2024-25: -2.9%	STRENGTH Skyway has good visibility and presence along Skyway Road. Quick connectivity to Highway 99 to the west. WEAKNESS Skyway Industrial sales tax small compared to size largely due to Caltrans laydown yard, vacant undeveloped areas south of Morrow Lane.
West East Avenue 2025 Sales Tax: \$419,388 % Change 2024-25: -1.3%	STRENGTH Opportunity sites on either side of W. East Ave, both owned by Enloe Health. Ace Hardware is 99 th percentile nationwide for visits. NEUTRAL Keep centers with right mix for neighborhood and extended neighborhood.
Nord Avenue 2025 Sales Tax: \$418,388 % Change 2024-25: 8.8%	STRENGTH Opportunity sites to north of corridor for medium-density residential. Businesses supported by Chico State students. WEAKNESS No areas available for further build out of commercial or mixed-uses.
South Campus 2025 Sales Tax: \$351,055 % Change 2024-25: -1.6%	STRENGTH Retail businesses support Chico State. NEUTRAL South Campus will always be a smaller sales tax generator based on its mix of uses and lack of available land for expansion.
Park Avenue 2025 Sales Tax: \$306,385 % Change 2024-25: -4.4%	STRENGTH General commercial and personal services near downtown. Currently undergoing the Park Ave Beautification Project. WEAKNESS There are numerous underdeveloped parcels along the Park Avenue frontage.
Meriam Park 2025 Sales Tax: \$172,901 % Change 2024-25: 0.3%	STRENGTH With construction of Enloe Cancer Center and further build-out of residential areas, Meriam Park will only attract more visitors and users for restaurants and shops, generating more sales tax. WEAKNESS Existing vacant retail tenant spaces remain unfilled.
Airport Park 2025 Sales Tax: \$137,787 % Change 2024-25: -10.5%	STRENGTH Industry clusters focused on wildland firefighting and aviation-supporting businesses. Several properties available for lease. WEAKNESS With manufacturing uses, should be greater sales tax generation. City needs to better understand underlying conditions with HdL.

8. Housing & Future Growth Areas

Housing availability and diversity are important components of Chico's capacity for economic growth. The General Plan identifies five Special Planning Areas (SPAs)—Bell Muir, Barber Yard, Doe Mill/Honey Run, North Chico and South Entler—intended to accommodate significant future housing and mixed-use growth. These SPA areas represent 2,250 acres and roughly 6,600 dwelling units, if developed. These areas were mapped to show where Chico's long-term planned housing capacity is proposed.

Also mapped are the General Plan's five **Corridor Opportunity Sites (COSs)** along North Esplanade, Mangrove Avenue, Park Avenue, Nord Avenue and East Avenue. These corridors provide additional opportunities for housing, mixed-use development and reinvestment within the city.

The SPAs and COSs have been mapped in the Economic Centers StoryMap to **visually identify where Chico has identified future housing growth should occur**. The mapping does not determine whether or how these areas can be developed. Development will depend on infrastructure, entitlements, market conditions and other factors. Further analysis is needed to determine how much of this identified long-term housing capacity could realistically contribute to **housing supply during the Strategy period**.

OPPORTUNITY: Advance Economic Placemaking

Establish a **Chico Economic Centers Placemaking Initiative**, potentially through TeamChico, to work with commercial property owners in their interest to identify opportunities to strengthen their centers as community assets and consumer destinations.

With property-owner interest and approval, organize a working group of business and property owners, arts and design representatives, possible students and City staff to review selected centers using the General Plan Community Design Element as a guide. Identify practical, center-specific opportunities for landscaping, lighting, wayfinding, public art, gathering spaces and other improvements that enhance center identity, customer experience and investment appeal.

Use the Economic Centers mapping analysis to identify potential pilot locations, starting small. With participating property owners, identify potential or possible practical, center-specific improvements in landscaping, wayfinding, public art, and/or gathering spaces that strengthen the center's identity, customer experience and opportunities for reinvestment. If resources available develop illustrative enhancement concepts that align with economic development placemaking objectives.

Using Community Design Element guideline to create a Chico Economic Center Placemaking Initiative	
General Plan Policy Direction	Economic Development Application
CD-1.2 — Neighborhoods, Corridors & Centers (p. 5-10). Strengthen the positive qualities of neighborhoods, corridors and centers.	Identify opportunities to enhance each center's identity and economic appeal. Offer property owners conceptual center enhancement plans showing potential improvements, gathering spaces and new uses.
CD-1.1.2 — Landscaping (p. 5-10). Emphasize landscaping as a fundamental design component.	Identify opportunities for additional trees, shade, landscaping and attractive outdoor spaces. Illustrate potential improvements through conceptual landscape and streetscape drawings.

CD-3.3 — Public Spaces (p. 5-13). Design public spaces in commercial and mixed-use projects to promote pedestrian activity.	Explore how underutilized parking areas, courtyards and spaces between buildings could become neighborhood gathering places, outdoor dining areas, markets or event spaces.
CD-6 — Gateways & Wayfinding (pp. 5-14–5-15). Enhance gateways and wayfinding.	Develop illustrative center identity, entrance, signage and wayfinding concepts that improve visibility and strengthen connections with surrounding neighborhoods.
CD-7 — Public Art (p. 5-15). Expand public art's role in Chico's economic vitality and quality of life.	Identify opportunities for murals, sculptures, installations and locally inspired art that distinguish centers and encourage visits.
Appendices B & C — Opportunity Sites & Special Planning Areas.	Identify sites where conceptual redevelopment or enhancement plans could help property owners recognize investment opportunities.
Safety & Security Lighting — Additional consideration.	Identify poorly lit parking areas, walkways and building entrances. Recommend lighting concepts that improve safety, visibility and customer confidence.
Wildfire Hardening & Resilience — Additional consideration.	For centers near wildfire-risk areas, facilitate Chico Fire Department assessments and recommendations for defensible space, building hardening, vegetation and emergency access. These measures may also support insurability.

Concept: Commercial Centers to Community Assets. Economic Development can work with interested property owners to envision how their centers could become stronger consumer destinations and neighborhood gathering places. Conceptual enhancement plans could illustrate opportunities for landscaping, public art, outdoor dining, small events, pedestrian connections and creative reuse of underutilized spaces. These concepts can help stimulate private investment, attract businesses and strengthen each center's role in the surrounding community. This could possible be aligned with higher education classes/students.

Example, consider a neighborhood shopping center with a large, underutilized parking lot.



Illustrative possibilities: portions of underutilized parking areas could accommodate neighborhood markets (occurring already at North Valley Plaza through pop-ups), shaded seating, outdoor dining or small community events, subject to property-owner interest and site requirements.

Instead of identifying the parking lot as underutilized, could offer a concept drawing showing how a portion might function as a neighborhood third place—somewhere residents gather beyond home and work. It might create a reason to visit the center even when residents are not making a specific purchase.

Sources

- City of Chico. Chico 2030 General Plan. Community Design Element, Center Design, goals and policies (p. 5-15) and Appendices B & C, Opportunity Sites & Special Planning Areas, respectively.
CD-1.2, p. 5-10, Strengthen the positive qualities of neighborhoods, corridors and centers.
CD-1.1.2, p. 5-10, Emphasize landscaping as a fundamental design component.
CD-3.3, p. 5-13, Design public spaces in commercial and mixed-use projects to promote pedestrian activity.
CD-6, pp. 5-14–5-15, Enhance gateways and wayfinding.
CD-7, p. 5-15, Expand public art's role in Chico's economic vitality and quality of life.
- Chico Economic Vitality Strategy. Technical Paper: Economic Analysis 2020-2026 with 2030 Forecast.
- City of Chico. Recycling Market Development Zone / Available Sites & Business Resources.
- Chico Economic Centers StoryMap, live working map and center inventory.