OneBayArea

Sustainable Communities Strategy

ALTERNATIVE LAND USE SCENARIOS
Core Concentration, Focused Growth, and Outer Bay Area Growth

REVISED: August 30, 2011

In July, ABAG's Executive Board and the Metropolitan Transportation Commission approved a framework for Five Alternative Scenarios, which will be used to inform the development of the Preferred Scenario of the Sustainable Communities Strategy (SCS). Scenario 1 and 2 are based on unconstrained growth, assume very strong employment growth, and unprecedented funding to support housing affordability. Scenario 1, the Initial Vision Scenario was released in March 2011. Scenario 2, Core Concentration Unconstrained will be developed to provide a more concentrated development pattern along transit corridors. These two scenarios are essential to identify the challenges and policies for an ideal sustainable development path.

This report presents the land use patterns for scenarios 3, 4, and 5 based on an assessment of economic growth, financial feasibility, and reasonable planning strategies. They provide a range of housing and employment distribution patterns across places and cities that support equitable and sustainable development. The three scenarios are as follows:

- *Core Concentration Growth Scenario:* Concentrates housing and job growth at selected Priority Development Areas in the Inner Bay Area along the region's core transit network.
- *Focused Growth Scenario:* Recognizes the potential of Priority Development Areas and Growth Opportunity Areas across the region with an emphasis on housing and job growth along major transit corridors.
- *Outer Bay Area Growth Scenario:* Addresses higher levels of growth in the Outer Bay Area and is closer to previous development trends than the other two scenarios.

These three scenarios assume a strong economy supported by the appropriate affordable housing production. They also assume targeted local and regional strategies and additional funding to support sustainable and equitable growth. They are designed primarily around Priority Development Areas and Growth Opportunity Areas, as places for growth identified by local jurisdictions. (PDAs will refer to both areas in this report) The level of PDA growth is defined based on the Place Type established by the local jurisdiction (i.e., regional center, transit neighborhood, rural town), which provides a regional language to recognize the character, scale, density and expected growth for the wide range of places in the Bay Area. Beyond the PDAs, household growth is distributed based on employment, transit access, household formation, and housing production. Employment distribution is based upon the existing employment pattern, reversing the previous dispersal trends throughout the region.

Regional dialogue on land use scenarios

The purpose of the land use alternative scenarios is to expand the regional dialogue on the type of development, planning strategies, and investments to define the SCS. We are seeking input from local jurisdictions, community organizations, business organizations, and general public on the following themes:

Distribution of growth

- Shifting from previous trends of dispersed growth, do these three land use scenarios provide an appropriate spectrum for sustainable and equitable development trends? Is growth concentrated at the appropriate places?

Development of vital and healthy places

- Are housing and jobs converging at the appropriate places? Can this convergence support greater access to jobs and housing, particularly for the low and moderate income populations?
- What elements of the scenarios would support the development of complete communities?
- Do the scenarios address the local expectations and necessary adjustments for regional equity and sustainability?

Planning strategies and investments

- How can local jurisdictions, community organizations, and business organizations converge into a coherent regional strategy?
- What policies and investments should be prioritized to support the SCS?

This report includes five sections and two appendices. The first section is a brief summary of the input received from local jurisdictions and stakeholders on local development and equity. The second section is an overview of regional employment and household growth between 2010 and 2040. The third section describes employment trends and distribution, including some details of the recent regional employment analysis undertaken by ABAG and MTC to inform the land use patterns. The fourth section provides an overview of the housing distribution, which relies on the housing analysis presented in previous reports. The fifth section covers the next steps towards the development of the Preferred Scenario. The appendices include, first, details on the methodology for growth distribution; and, second, tables of growth by PDA and local jurisdiction. Scenarios maps are compiled in a separate packet.

1. INPUT ON SCS SCENARIOS

The development of the SCS Core, Focused, and Outer Bay Area Growth Scenarios are informed by a wealth of input we received on the Initial Vision Scenario (IVS) from local elected officials, planning directors, and Congestion Management Agencies (CMAs) as well as from the Regional Advisory Working Group, Equity Group, and stakeholders groups. County-level Basecamp sites have been well noticed and public workshops were held throughout our nine-county region.

As indicated in previous reports, land use decisions are a local responsibility governed by local jurisdictions. The land use scenarios presented here are based upon local input and strong coordination among local and regional agencies. Regional agencies have incorporated local input into three coherent land use development patterns.

Input on local development

The input received reflects the unique characteristics of the region's communities. Some communities described the level of housing growth depicted in the IVS as too high, while other jurisdictions responded that IVS housing growth levels would be appropriate if funding for redevelopment, public schools, transit and other community infrastructure were available. Still, a number of common themes have emerged.

- *Addressing the Bay Area economic challenges*: The Bay Area's first Sustainable Communities Strategy should advance a vibrant economy and strong growth for the region. Employment growth should be aligned with existing and planned transit. Employment totals are too high given past performance and the depth of the recession.
- *Sustainable and equitable housing production*: Growth levels in the Initial Vision Scenario are not feasible given current market constraints and funding availability. Infill development challenges require capital investments and supportive policies. The SCS should reward communities that advance sustainable growth at transit nodes.
- *Transit service*: Cuts in transit service will impede sustainable growth. Transit-served, infill areas that have not been nominated by local communities as PDAs should take on comparable levels of growth.
- *Coordination of regional efforts*: Loss of redevelopment agencies will limit infill development. The SCS should provide CEQA benefits for projects in PDAs. Air District and BCDC requirements should be aligned with the SCS.

Input on equity

Regional agency staff has worked with the Regional Equity Working Group and MTC's Policy Advisory Council to develop inputs to the Alternative Scenarios that will increase access to opportunities and an improved quality of life for residents from all income categories in communities throughout the region. Social equity as well as economic growth and environmental sustainability are promoted through the emphasis on encouraging growth in complete communities served by transit. In addition, each of the alternative scenarios will also distribute growth in a way that ensures each jurisdiction is planning to accommodate a minimum percent of its expected household growth. Factors related to transit service, employment, and net low-income commuters to a jurisdiction will also inform the alternative scenario housing distributions.

2. REGIONAL EMPLOYMENT AND HOUSEHOLD GROWTH 2010 – 2040

The recent national economic recession triggered a major employment decline. Recent data and research indicates that the nation is facing a slower recovery than expected over the next few years, which will in turn impact the recovery of the Bay Area. Beyond this short term recovery, the rates of employment growth for the Bay Area and California have become closer to or lower than the national rates since the 1980s. They were higher than the nation from the 1960s to the 1980s, but as the region and the state matured in its economic composition, growth rates became closer to the national average.

Due to lowered forecasts of national economic and job growth, along with dramatic decreases in state and national immigration levels (even prior to the recession), the Bay Area job forecast for 2040 would be revised downward by an estimated 100,000 jobs than the forecast employment for the Initial Vision Scenario. The total jobs for 2040 would drop by another 200,000 jobs by switching to a forecast where the Bay Area maintains its current share of national employment.

Even under those considerations, the SCS can reasonably assume a healthy economy for the Bay Area by 2040. High expectations are based on the strength of our knowledge-based economy, the development of new high technology sectors as well as the diverse economy to support these leading sectors. In addition, the Bay Area has a highly qualified labor force when compared to other regions and a high quality of life based on access to urban amenities, natural resources, and a Mediterranean climate. The region also provides businesses with a wealth of research and development resources and a strong network of international exchange.

Given these resources, regional and economic experts working with ABAG and MTC suggest the Bay Area could add almost a million jobs up to 4.26 million jobs by 2040. This is an average of 33,000 per year over the next 30 years, which assumes a healthy and strong economy. This is more than three times the 10,000 average annual job growth of the previous two decades. It is close to the 40,000 average annual job growth of the last 50 years when the region experienced the development of the high technology industry and the finance sector.

This employment growth will be supported by strong housing production of about 770,000 units by 2040. This would represent an annual production of 27,000 units per year. The slow recovery of job growth and housing prices are expected to limit housing production in the near-term. This period should be addressed independently from the housing production of the later years. Assuming a suppressed housing production rate of 15,000 units from 2010-2015, this level of growth would increase to almost 30,000 units per year over the 2015-2040 timeframe. In comparison, historical rates were 20,000 per year from 1990-2010 and 36,000 averaging 1970, 1975, 1980, and 1985 rates, periods of much greenfield housing production.

The expected growth of 770,000 housing units by 2040 in the scenarios under discussion is lower than the equivalent one million units in Initial Vision Scenario. The former is the expected housing production while the latter reflects the housing need. The expected housing production addresses lower 2010 household and population counts (Census 2010), lower employment growth than previous forecasts, and reasonable assumptions on market trends, local and regional policies, and infrastructure.

This level of housing reflects a reasonable job to household ratio for the Bay Area and would consider a reasonable pace of recovery of the housing market. For these scenarios we are assuming a job to household ratio of 1.3 by 2040. This ratio is based on the regional average over the past six decades and is also similar to the present-day ratio. It could be expected that demographic shifts would lower this ratio over the next fifteen years as the baby boomer generation retires, but that it would rise again in the later years of the planning horizon.

Regional Growth: Households, Population, Employed Residents, Jobs, 2010 - 2040

	Core, Focused, and Outer Bay Area Growth Scenarios			**Initial Vision Scenario**
	2010	**2040**	**Growth 2010-40**	**Growth 2010-40**
Households	2,608,000	3,378,000	770,000	1,031,000
Population	7,151,000	9,236,000	2,085,000	2,432,000
Employed residents	3,153,000	3,974,000	821,000	1,338,000
Jobs	3,271,000	4,266,000	995,000	1,463,000

These scenario land development patterns will be supported by transportation scenarios that will vary the level of funding for "fix-it-first" maintenance, transit capacity improvements, roadway improvements, and bike/pedestrian funding.

3. REGIONAL EMPLOYMENT DISTRIBUTION

The region is experiencing a transformation in its economic activities and in its population composition, both of which have major land use implications. The very strong growth of knowledge-based activities at the intersection with urban amenities brings new strength to employment centers. These economic trends are parallel to some key emerging demographic changes: young professionals' preferences for vital urban places instead of office parks, an increase in the ethnic diversity of the labor force and residents, and a major wave of retirement and increase in the senior population. Providing that the region can develop and implement a solid SCS, these changes provide an opportunity to strengthen the economic health, social equity, and sustainability of the Bay Area.

SCS tasks to support a healthy economy include:

- Provide the appropriate transit, affordable housing, and urban amenities to support the new wave of industries at urban locations and densified office parks.
- Support a diverse economy through public investments that support strategic sectors, and the retention and expansion of affordable housing close to major employment centers.
- Regain the economic vitality of regional centers, which lost employment over the past decades. Support increased densities and a mix of uses at suburban office parks, which have been major employment growth areas.
- Concentrate urban amenities and affordable housing in downtown areas and along transit corridors across the region.
- Maintain and increase the viability and productivity of industrial lands and agricultural resource areas.

For the purpose of the SCS Alternative Scenarios we have revised the total employment growth by 2040, the growth by industry, and the distribution by PDA and city. The rationale for this healthy economic growth in relation to population and housing growth will be discussed in a separate memo. This report primarily focuses on growth by industry and distribution patterns based on the employment analysis developed by ABAG and MTC in collaboration with Strategic Economics.

Changes in the regional industrial composition

Starting in the 1970s the region experienced major employment growth in San Francisco's financial district and the emergence of Silicon Valley as the global center of high technology. In contrast to many other metropolitan regions for subsequent decades, the Bay Area's economic sectors developed through very distinct specialized clusters. In the years following the turn of the millennium the region has a more mature economic base with an economic sector composition that is closer to the national average.

Professional and business services and information jobs have become the major leading sectors in the regional economy. Over the last decades they have experienced sharp growth but they have also been the most impacted during periods of economic decline. These regional leading sectors have increased the demand for highly educated labor and provided high wage jobs. Educational and health services have displayed steady growth, but a more moderate level than professional services. These sectors have surpassed manufacturing, government administration, and retail employment. Over the next 30 years, educational and health services sectors are expected to continue their rate of growth. Professional and business services are expected to generate more than one third of the total regional growth by 2040.

Since the 1980s, these growing sectors have more than compensated the loss in manufacturing and finance jobs. During this period, much of the region's traditional manufacturing employment has relocated to low cost labor regions in Asia and Latin America. More recently despite steady growth in professional and business service jobs related to emerging technology industries, high tech manufacturing has also relocated out of Silicon Valley to lower cost locations. Changes in technology have also reduced labor requirements and increased productivity for the remaining manufacturing businesses. On the opposite spectrum of the economic sector location patterns, while the region continues to be an important financial center, finance employment jobs have been eliminated or relocated out of the Bay Area. The decline of these two sectors has resulted in a loss of middle-income jobs for the region. Looking forward to 2040, manufacturing and finance are not expected to significantly expand. However, they will remain essential and stable sectors in the regional economy and are expected to retain approximately the same employment size over the next 30 years.

The Bay Area is a major international destination for business and leisure travel. Leisure, hospitality and retail are growing employment sectors. In particular, leisure and hospitality employment has grown at a faster pace than retail, following the pattern of professional and business services. Both industry groups are expected to retain a steady growth over the next 30 years.

Changes in the regional spatial patterns

Over the past decades the Bay Area experienced a decline of employment at its major regional economic centers while suburban employment centers and office parks emerged and grew throughout the region. These spatial patterns were conditioned by the decline of the finance sector in San Francisco, the growth of the high technology sectors in Silicon Valley, the formation of the Tri-Valley business cluster supported by labor from lower housing cost communities in the eastern part of the Bay Area and the central valley, and the strengthening of medium size downtowns such as Walnut Creek, Santa Rosa and Berkeley.

The growth of professional services in close proximity to urban amenities, point toward a new wave of growth that could be accommodated at major economic centers and a demand for urban amenities, mixed-uses and higher densities at suburban employment locations. Analysis of employment and demographic trends indicates that the SCS can serve to support these emerging trends by increasing access to transit, affordable housing, and urban amenities at employment centers. The SCS would recognize the economic function of each place in the region and the potential they offer for the growth of selected industry groups, jobs and businesses. This recognition is also informed by the community choices on the function and qualities of their places. Some of the expected trends are described below.

- **Renewed regional centers**

Regional centers have reduced their office jobs as a share of the region from 49 percent in 1990 to 41 percent in 2010. Downtown San Francisco and Downtown Oakland also reduced their absolute employment levels. Downtown San Jose had a small increase. In the SCS Scenarios we expect a reversal of this trend. This is based on the rate and scale of growth of professional services urban entertainment, which brings a new economic vitality to the regional centers. Similar to the growth of the financial district in the 1970s, the Bay Area is attracting new businesses and workers that want to locate in close proximity to related firms, services and amenities. The new wave of businesses and young professionals' demand for building space prioritizes flexibility to adjust spaces to multiple functions and requires less office space per worker relative to the early growth of traditional downtown office space. The growth of health and educational services would also support the growth of regional centers.

- **Office parks:**

Office parks have been a dominant building pattern in the two suburban areas that experienced major growth in the Bay Area over the past several decades: Silicon Valley and the Tri-Valley. In the SCS Alternative Scenarios office park employment will continue to grow but at a slower pace than in recent decades. The emerging private shuttle services run by businesses, particularly in San Mateo and Santa Clara County are expected to grow and improve transit access while lessening, but not fully mitigating increased freeway traffic congestion related to employment growth. Growth in office park employment is limited in part by the capacity of the region's congested freeway network. Office parks in the Tri-Valley area would house more workers within their own jurisdictions, but will continue to draw from lower cost labor in the Central Valley. Some office parks would be transformed with additional office buildings and a mix of uses including housing.

- **Downtown areas and transit corridors**

The increasing need and desire for local services in close proximity to residential locations has led to a clustering of services along corridors and in small downtown areas over the past decades. The increasing size of the region's senior population will likely reinforce this trend over the next decades. The SCS Alternative Scenarios assume an increase in local serving jobs in Priority Development Areas proportional to housing growth in PDAs.

- **Industrial land**

The decline of the manufacturing and wholesale employment due to business relocation and changes in technology has resulted in a major contraction of those businesses in industrial areas. In many areas this has not resulted in vacant industrial land, but a different mix of businesses that are necessary to support the local and regional economies. In addition to basic services such as refuse collection or supply distribution, industrial lands are now occupied by a wide range of businesses from food processing to green industry manufacturing, and auto repair to high tech product development drawing employment from many sectors into traditional industrial lands. The SCS Alternative Scenarios assume limited but stable job growth in manufacturing, given retention of industrial land at core locations and an expanding array of production, distribution and repair activities.

- **Agricultural land**

The Bay Area has a wealth of agricultural land unparalleled among our nation's largest metropolitan regions that provides high quality agricultural products including diverse high-value crop production and its world-renowned wine industry. For the most part the region's remaining farmland is policy-protected from urban expansion. All of the counties outside of San Francisco have a growth management framework (e.g. urban growth boundaries, agricultural zoning, etc.) in place. The SCS Alternative Scenarios assume the retention of most agricultural land with some increase in productivity yielding modest employment growth.

Core Concentration, Focused Growth, and Outer Bay Area Growth Scenarios

Given the expected levels of regional growth, changes in the economic sector composition, and changes in the spatial patterns of employment location, the three alternative scenarios provide alternative land use development patterns based on various degrees of employment concentration. All scenarios assume nearly one million additional jobs in the region through 2040. They also assume the same growth rates by industry. The three scenarios assume slowing or reversal in the declining share of employment in Priority Development Areas experienced in previous decades. The three scenarios also assume some growth in local serving jobs proportional to the housing growth by PDAs.

The three employment scenarios are CONCEPTUAL scenarios to understand and assess distinct land use patterns in relation to housing and transit. Starting from the current distribution of employment and growth trends over previous decades, the scenarios add three factors: the concentration of jobs in PDAs, the concentration of knowledge-based jobs (Information, Finance, Professional & Business Services), and the link of local serving jobs (primarily Retail, some Health, Educational, and Recreational Services) to housing growth. They do not yet include input from local jurisdictions or analysis of land constraints, industrial cluster support, or public and private investments. This input and analysis will be essential to develop the employment distribution for the Preferred Scenario.

Overview of job growth by scenario

	Core Concentration	**Focused Growth**	**Outer Bay Area**
Land use trends	Higher growth in major employment centers close to transit	Higher concentration of employment in PDAs than 2010	Continued trends of more growth in Outer Bay Area and more growth outside of PDAs
PDA job growth	Small increase of PDAs share of regional jobs over Focused Growth Scenario	Small increase of PDAs share of regional jobs over 2010	Decline of PDAs share of regional jobs over 2010
Knowledge-based jobs	Additional 15% in inner bay PDAs	Additional 10% across all PDAs	Decline in share of PDAs following previous trends
Local serving jobs	Follows housing growth, more jobs in inner bay area PDAs	Follows housing growth, distributed across all PDAs and jurisdictions	Follows housing growth, more jobs in outer bay area

Core Concentration Growth Scenario: This scenario assumes that the concentration of employment in PDAs across most economic sectors will remain as in 2010. Knowledge-based jobs will be more concentrated in regional centers, city centers, urban neighborhoods, and mixed-use neighborhoods in the Inner Bay Area places where jobs are concentrated today. Local serving jobs will follow housing in PDAs, which will be more concentrated in the Inner Bay Area.

Focused Growth Scenario: This scenario assumes that the concentration of employment in PDAs across most economic sectors will remain as in 2010. Knowledge-based and local serving jobs will be more concentrated in PDAs by 2040 than in 2010.

Outer Bay Area Growth Scenario: This scenario follows the growth trends from the previous 30 years but with lower rates of job dispersal. Regional Centers and large City Centers grow but slower than other Place Types, while Suburban Centers and office parks outside of PDAs continue to grow at higher rates than the regional average.

Employment by economic sector

The employment growth by economic sector is based on the forecast prepared by Caltrans and adjusted to the total regional growth established by ABAG and MTC. While the same level of growth by industry is assumed in the three scenarios, the distribution by city and PDA varies across scenarios.

Employment growth by economic sector 2010 - 2040

	Jobs 2010	Jobs 2040	Job growth 2010 – 2040	Annual Growth Rate 2010- 2040
Total Jobs	3,270,906	4,265,736	994,831	1.01%
Agriculture and Natural Resources	22,142	22,286	144	0.02%
Manufacturing Wholesale and Transportation	543,974	659,580	115,606	0.71%
Retail	325,168	402,036	76,868	0.79%
Professional and Business Services / Finance	774,502	1,153,879	379,378	1.63%
Health, Education, Recreation Services	853,755	1,106,095	252,340	0.99%
Other: Information, Government, Construction	751,365	921,860	170,495	0.76%

Distribution of Employment

The employment distribution for 2010 is based on NETS data (See appenedix for description of data sources). This data provides employment information by location of a business establishment. This is a high level of geographical resolution, which allows us to capture the employment by PDA more accurately than previous zip code data.

In 2010, it was estimated that PDAs encompassed an estimated 1,586,000 or 48 percent of jobs regionwide. This is 5 percent lower than the PDA share in 1990 according to ABAG analysis of the NETS data. The three scenarios assume different shares of jobs in PDAs as indicated below. Following previous trends but at a slower pace, the Outer Bay Area Scenario assumes a lower PDA share of total jobs in 2040 than in 2010. The Focused Growth and Core Concentration Growth Scenarios both assume a higher concentration of jobs in PDAs in 2040 than in 2010.

Job Share in PDAs by Scenario: Past and Future Trends 1990 – 2010 – 2040

	Core Concentration	**Focused Growth**	**Outer Bay Area**
PDA Job Share 1990	53%	53%	53%
PDA Job Share 2010	48%	48%	48%
PDA Job Share 2040	51%	50%	48%
PDA Job Growth Share 2010-2040	58 %	55 %	47 %

Within PDAs, the distribution of jobs varies according to sector and Place Type. The Outer Bay Area Scenario retains a similar distribution in 2010 and 2040 except for the local serving jobs, which shifts according to housing growth. The Focused Growth Scenario increases knowledge-based jobs across all PDAs. The Core Concentration Growth Scenario increases knowledge-based jobs in regional centers, city centers, urban neighborhoods, and mixed-use corridors in the inner Bay Area.

Share of Regional Job Growth in PDA by Industry Group by Scenario 2010 – 2040

	Core Concentration	**Focused Growth**	**Outer Bay Area**
Total region	58%	55%	47%
Agriculture and Natural Resources	27%	27%	27%
Manufacturing Wholesale and Transportation	43%	43%	39%
Retail	61%	58%	55%
Professional services/Finance	65%	60%	45%
Health, Education, Recreation Services	48%	48%	47%
Other: Information, Government, Construction	67%	63%	51%

Share of Regional Job Growth in PDA by Place Type by Scenario 2010 – 2040

	Core Concentration	**Focused Growth**	**Outer Bay Area**
Total PDA/GOA Jobs	58.3%	55.3%	46.9%
<u>Inner Bay</u>			
Regional Center	21.4%	19.0%	12.5%
City Center	4.4%	3.9%	4.0%
Suburban Center	1.0%	1.1%	1.0%
Transit Town Center	2.6%	2.7%	2.9%
Urban Neighborhood	5.1%	4.6%	3.5%
Transit Neighborhood	2.3%	2.5%	1.8%
Mixed-Use Corridor	13.3%	12.1%	11.1%
Employment Center	1.4%	1.5%	1.2%
<u>Outer Bay</u>			
Regional Center	0.0%	0.0%	0.0%
City Center	0.7%	0.8%	0.8%
Suburban Center	2.0%	2.2%	2.5%
Transit Town Center	1.7%	1.9%	1.8%
Transit Neighborhood	0.8%	0.9%	1.3%
Mixed-Use Corridor	1.4%	1.6%	1.9%
Employment Center	0.2%	0.2%	0.3%
Rural Town Center	0.1%	0.2%	0.1%
Rural Mixed-Use Corridor	0.0%	0.0%	0.0%

Share of Regional Professional and Business Services / Finance Job Growth in PDA by Place Type by Scenario 2010 – 2040

	Core Concentration	**Focused Growth**	**Outer Bay Area**
Total PDA/GOA Jobs	65.1%	60.0%	45.4%
Inner Bay			
Regional Center	29.5%	25.3%	12.8%
City Center	4.7%	4.0%	5.1%
Suburban Center	0.7%	0.9%	1.4%
Transit Town Center	2.0%	2.4%	2.9%
Urban Neighborhood	4.7%	4.0%	2.8%
Transit Neighborhood	1.9%	2.3%	0.7%
Mixed-Use Corridor	14.3%	12.3%	11.5%
Employment Center	1.2%	1.5%	0.9%
Outer Bay			
Regional Center	0.0%	0.0%	0.0%
City Center	0.7%	0.8%	0.9%
Suburban Center	1.9%	2.2%	1.9%
Transit Town Center	1.5%	1.8%	1.1%
Transit Neighborhood	0.6%	0.7%	1.4%
Mixed-Use Corridor	1.1%	1.4%	1.5%
Employment Center	0.2%	0.3%	0.4%
Rural Town Center	0.1%	0.2%	0.2%
Rural Mixed-Use Corridor	0.0%	0.0%	0.0%

Share of Regional Retail Job Growth in PDA by Place Type by Scenario 2010 – 2040

	Core Concentration	**Focused Growth**	**Outer Bay Area**
Total PDA/GOA Jobs	61.3%	57.9%	55.0%
Inner Bay			
Regional Center	10.2%	9.2%	9.5%
City Center	4.7%	4.4%	4.2%
Suburban Center	3.2%	3.0%	3.2%
Transit Town Center	5.3%	4.8%	3.6%
Urban Neighborhood	5.1%	4.4%	3.6%
Transit Neighborhood	4.5%	4.0%	3.3%
Mixed-Use Corridor	16.2%	14.7%	12.1%
Employment Center	0.6%	0.6%	0.6%
Outer Bay			
Regional Center	0.2%	0.2%	0.2%
City Center	0.9%	1.2%	1.2%
Suburban Center	4.1%	4.3%	6.3%
Transit Town Center	2.2%	2.2%	1.9%
Transit Neighborhood	1.7%	1.9%	2.0%
Mixed-Use Corridor	2.3%	2.7%	2.8%
Employment Center	0.1%	0.1%	0.1%
Rural Town Center	0.1%	0.1%	0.1%
Rural Mixed-Use Corridor	0.0%	0.0%	0.1%

Job Growth by County and PDA by Scenario 2010 – 2040

	PDA Jobs			**County Jobs**		
	Core Concen-tration	**Focused Growth**	**Outer Bay Area**	**Core Concen-tration**	**Focused Growth**	**Outer Bay Area**
Alameda	106,300	104,000	93,500	203,800	203,700	216,300
Contra Costa	38,000	41,300	46,500	96,400	104,900	126,300
Marin	6,000	6,800	7,900	31,700	34,600	35,900
Napa	300	300	300	14,600	15,600	22,000
San Francisco	206,500	178,000	127,000	206,900	179,100	127,000
San Mateo	41,900	40,300	35,200	99,600	104,000	112,700
Santa Clara	159,300	154,000	129,300	254,200	257,400	247,400
Solano	6,600	7,300	7,500	42,000	46,200	50,200
Sonoma	15,600	17,600	19,700	45,500	49,200	57,100
TOTAL	580,400	549,700	467,000	994,800	994,800	994,800

4. REGIONAL HOUSING DISTRIBUTION

The three scenarios, Core Concentration, Focused Growth and Outer Bay Area Growth, address the distribution of 771,000 households by 2040 through alternative land use patterns. Each of these scenarios relates to the employment growth and the three distribution patterns described in the previous section. Levels of household growth are specifically linked to the concentration of knowledge–based and local serving jobs. The three scenarios support healthy economic growth by 2040.

Shifting from the dominant development trend of single-family homes in greenfield areas over the last three decades, the three scenarios assume a higher concentration of households within multi-family housing at transit nodes and corridors with appropriate services and stores. Most of the growth is expected to be accommodated through 3 to 6 story wood-frame buildings, with the exception of major downtown areas where steel-frame buildings of more than 10 stories would be constructed.

The scenarios vary in the overall share of households in PDAs as well as by Place Type and city. The distribution of household growth is based on local input and regional criteria established through the densities and scale of Place Types, transit service, employment, and net low-income commuters. In addition, in the three scenarios each city is expected to reach a minimum household growth equivalent to 40 percent of its household formation. This last factor comes from the Regional Housing Need Allocation methodology for 2014-2022, which identifies the housing needs by city to be addressed through local plans and zoning controls.

Local plans and their proposed housing growth are an important component in the distribution of household growth. Local input on household growth from each jurisdiction was utilized in at least one of the three scenarios.

The PDAs and the growth factors directly addressed equity in the SCS. This final approach to the alternative scenarios is the result of in-depth interactions with equity groups. PDAs cover a wide range of neighborhoods with diverse income levels, infrastructure needs, and transit service. Regional staff worked closely with local jurisdictions to identify neighborhoods appropriate for PDA designation that need public investment for current and future populations as well as areas that are ready to accommodate additional housing. Two growth factors are directly linked to equity. The low-income net in-commuters' factor recognizes the potential of cities with high employment and limited affordable housing to accommodate future household growth. Similarly, the minimum growth floor of 40 percent of jurisdictions' household formation level allows cities with good services to accommodate a portion of their own population growth.

In order to appropriately address equity in the SCS, ABAG and MTC will conduct a thorough assessment of regional income levels and distribution. This report only includes some minor revisions to the income distribution factors used in Projections 2009. Current regional economic changes in the type of businesses, jobs, and labor indicate some regional income polarization. This task requires detailed attention and will be a priority over the next several weeks in preparation for the draft Preferred Scenario.

Overview of household growth by scenario

	Core Concentration	Focused Growth	Outer Bay Area
Land use trends	More growth in PDAs, particularly in Inner Bay Area's major employment centers and transit nodes	Growth throughout regional transit corridors and job centers	Less growth in PDAs, more growth in Outer Bay Area along transit corridors.
Growth factors	Transit service Employment Net low-income commuters		
Minimum level of growth	40% of the expected household formation rate for each jurisdiction		
PDA household growth	Based on Focused Growth Scenario, increase household growth by 20% in Inner Bay Area, plus or minus housing value factor	Growth within PDAs based on minimum level of growth by Place Type.	Based on Focused Growth Scenario, increase household growth by 5 to 30% in Outer Bay Area depending on job growth

Core Concentration Growth Scenario: This scenario assumes a concentration of households in PDAs and jurisdictions in the Inner Bay Area to take advantage of the core transit network.

Focused Growth Scenario: This scenario assumes focused household growth in PDAs throughout the region's transit corridors.

Outer Bay Area Growth Scenario: Closer to recent development trends than the other two scenarios, this scenario assumes more growth of households in the Outer Bay Area in relation to the employment growth by jurisdiction.

The three scenarios vary in their share of PDA household growth from 67 to 79 percent of all regional growth. PDAs currently account for 24 percent of all households in the region. The PDA share of households increases to between 34 and 37 percent of all households in the three scenarios.

Households in PDAs by Scenario: Current and Future Trends 2010 – 2040

	Core Concentration	**Focused Growth**	**Outer Bay Area**
PDA households 2010	634,730	634,730	634,730
PDA households 2040	1,239,900	1,187,740	1,154,970
PDA households growth 2010-2040	605,170	553,010	520,270
PDA share of total households 2040	37%	35%	34%
PDA household growth share 2010-2040	79%	72%	67%

In the Core Concentration Growth Scenario, Inner Bay Area jurisdictions for the most part experience a greater concentration of growth within their PDAs than in the Focused Growth Scenario, whereas in the Outer Bay Area Scenario growth is less concentrated in the PDAs. In each of the scenarios, the 40 percent housing growth threshold has a considerable affect on some of the smaller residential communities throughout the region.

The concentration of households varies by Place Type. In each scenario, the greatest share of regional growth is within the Mixed-Use Corridors, followed by Regional Centers. The Core Concentration Growth Scenario brings a higher concentration of households at Regional Centers, City Centers, Urban Neighborhoods, and Mixed-Use Corridors. This includes downtown areas in Oakland, San Francisco and San Jose and the San Pablo, Mission, and El Camino transit corridors. The Transit Town Centers and Transit Neighborhoods also play an important role in the Core Concentration Growth Scenario, as many of the PDAs along the core transit network in the Inner Bay Area have these Place Types. In the Focused Growth and Outer Bay Area scenarios, growth is more evenly distributed across all Place Types. The Outer Bay Area Growth Scenario shows higher growth in suburban centers such as the Dublin, Livermore, and San Ramon PDAs

Share of Regional Household Growth in PDA by Place Type by Scenario 2010 – 2040

	Core Concentration	**Focused Growth**	**Outer Bay Area**
Total PDA/GOA Share of Households	37%	35%	34%
Regional Center	12.6%	11.2%	10.3%
City Center	8.4%	8.3%	7.7%
Suburban Center	8.3%	8.3%	8.5%
Urban Neighborhood	7.3%	6.1%	5.1%
Transit Town Center	11.2%	9.9%	9.8%
Transit Neighborhood	10.2%	9.3%	9.2%
Mixed-Use Corridor	20.2%	18.3%	16.6%
Employment Center	0.1%	0.0%	0.1%
Rural Town Center	0.1%	0.1%	0.1%
Rural Mixed-Use Corridor	0.2%	0.2%	0.2%

The distribution of growth by county varies according to their transit access and the relationship of the county to the Inner and Outer Bay Area. Alameda, San Francisco, San Mateo, and Santa Clara, counties have high levels of existing transit service and are primarily within the Inner Bay Area. As a result these counties have more growth in the Core Concentration Growth Scenario. North Bay Counties—Marin, Napa, Solano and Sonoma— and much of Contra Costa County are identified as part of the Outer Bay Area and many of their cities have limited transit access. Thus they display higher growth in the Outer Bay Area Growth Scenario.

Household Growth by County and PDA by Scenario 2010 – 2040

	PDA Households			**County Households**		
	Core Concen-tration	**Focused Growth**	**Outer Bay Area**	**Core Concen-tration**	**Focused Growth**	**Outer Bay Area**
Alameda	132,610	121,050	111,740	167,750	172,990	164,300
Contra Costa	66,790	67,510	72,650	96,880	110,930	136,550
Marin	4,100	6,380	6,690	10,100	11,260	13,250
Napa	1,660	1,660	1,740	5,520	6,290	7,170
San Francisco	105,110	85,940	71,900	110,640	90,470	76,430
San Mateo	54,820	44,130	40,810	72,110	68,570	61,700
Santa Clara	205,960	182,220	167,280	245,990	242,060	227,120
Solano	15,440	16,390	17,230	28,740	30,860	38,690
Sonoma	18,680	27,730	30,230	33,080	37,380	45,620
TOTAL	605,170	553,010	520,270	770,810	770,810	770,830

5. NEXT STEPS

The three land use scenarios presented in this report provide the preliminary analysis for the development of the SCS Preferred Scenario. The following additional tasks are pending to inform the Preferred Scenario and will be developed this fall 2011.

1. Land use analysis
   - Further analysis of regional employment and population growth
   - Further analysis of income forecast and distribution
2. Policy Development to support the Preferred Scenario
   - Housing production
   - Infill development investments
   - Transit access
   - Complete Communities
3. Transportation network analysis
4. Performance targets results for the three Alternative Land Use Scenarios
5. Gather input from local jurisdictions and stakeholders to inform development of the Preferred Scenario

APPENDIX I

1. EMPLOYMENT DISTRIBUTION DATA AND METHODOLOGY

Data Sources

California Department of Transportation Sector Forecast (Caltrans)
Caltrans uses an econometric model to project employment by industry out to 2040 for each county in California. The agency's model uses variables and assumptions taken from the UCLA Anderson Forecast and historic employment data from EDD. The most recent projections were released in March 2010. In comparison, the most recent EDD and BLS projections available date from 2008 and 2009. A complete description of the 2010 Caltrans projection methodology and data out to 2035 (2040 data was provided upon request) is available at: http://www.dot.ca.gov/hq/tpp/offices/ote/socio_economic.html.

Walls & Associates / Dun and Bradstreet (NETS)
Walls & Associates converts Dun and Bradstreet archival establishment data into a time-series database of establishment information called the National Establishment Times-Series (NETS) Database. ABAG has analyzed the NETS data to provide information on the spatial distribution of jobs at the jurisdiction and PDA level by employment sector, as well as changes in spatial distribution at these geographies from 1989-2009. More information on the NETS data is available at: http://www.youreconomy.org/nets/?region=Walls

Methodology

2010 Employment
Current employment is based on total jobs established for the Current Regional Plans and Initial Vision Scenario and the Caltrans breakdown by employment sector for the region for 2010. NETS 2009 data is used to distribute jobs by geography for each sector.

Scenario Employment Distribution
The Caltrans forecast – scaled to match the regional constrained employment total established for the three alternative scenarios – was used for the regional growth by employment sector for all three scenarios. Each scenario follows two basic steps for then distributing employment growth by geography for each sector.

1. As a baseline, Focused Growth and Core Concnetration Growth Scenarios maintain 2010 employment distribution by Place Type and county into the future and Outer Bay Area Growth Scenarios slows down the 1989-2009 trends in distribution of jobs by Place Type and county.
2. A portion of local-serving jobs and knowledge-based jobs are then distributed to follow the investments and growth pattern for each scenario.

Core Concentration Growth Scenario

The Core Concentration Growth Scenario starts with a baseline of maintaining 2010 employment distribution by sector by geography. 50% of new Retail jobs and 10% of new Health, Educational, and Recreational Services jobs were then allocated by PDA and by jurisdiction in conjunction with the housing growth distribution, reflecting a share of local-serving jobs that follows the housing growth in the Core Concentration scenario. An additional 15% of new Information, Professional & Business Services, and Government jobs were located in Inner Bay PDA locations that were Regional Center, Mixed-Use Corridor, City Center, and Urban Neighborhood Place Types. This reflects a further concentration in these sectors into the transit-served locations where they are already concentrated, corresponding to a stronger agglomeration of the knowledge-based and other vertical-office-user jobs into these core areas. These additional office jobs were also allocated to the corresponding jurisdiction.

Focused Growth Scenario

The Focused Growth Scenario also starts with a baseline of maintaining 2010 employment distribution by sector by geography. 50% of new Retail jobs and 10% of new Health, Educational, and Recreational Services jobs were again allocated by PDA and by jurisdiction in conjunction with the housing growth distribution in the Focused Growth Scenario. The Focused Growth Scenario also includes an additional 10% of new Information, Professional & Business Services, and Government jobs locating in PDA locations, reflecting a further consolidation of office uses in PDAs. These additional office jobs were distributed to PDAs throughout the region in proportion to their existing share of these sectors.

Outer Bay Area Growth Scenario

The Outer Bay Area Growth Scenario starts with a baseline that slows the 1989-2009 trend in job distribution by PDA Place Type (for the PDA distribution) and by County (for the jurisdiction distribution). In general this exhibits higher growth in the outer bay counties and slower growth in PDAs overall and a shift in share from inner bay PDAs to outer bay PDAs. As in the other two scenarios, 50% of new Retail jobs and 10% of new Health, Education, and Recreation jobs were allocated by PDA and by jurisdiction to match the housing growth distribution in the Outer Bay Area Growth Scenario. In this scenario, no additional office jobs were added to PDA locations. However, for the counties with both inner and outer bay designations (Alameda, Contra Costa, and Santa Clara counties), a share of Professional & Business Services jobs were reallocated from the inner bay to outer bay jurisdictions to reflect the trend in greater dispersal of jobs within these counties.

2. HOUSING DISTRIBUTION METHODOLOGY AND DATA

Data Sources

U. S. Census Bureau – 2010 Census
U. S. Census Bureau – Longitudinal Employment and Household Dynamics (LEHD)
MTC Transit Coverage and Frequency by City

Methodology

Scenario Housing Distribution
Each scenario was developed based on the three key components.

1. ***Growth in Priority Development Areas:*** PDAs define a sustainable and equitable development framework for the SCS. Local and regional efforts support the development of PDAs as complete communities with the appropriate level of services and urban amenities for the current and future residents and workers. The minimum level of growth for each Place Type and local input were used as a basis for the level of growth in the PDAs.

2. ***Growth by local jurisdiction***: At the city level, jurisdictions' housing levels were based on Projections 2009, with adjustments based on the 2010 Census and local feedback. Household growth by city was determined based on job concentration, transit service, and existing population and jobs. In addition, a factor based on low-wage commuters was applied to the distribution of housing in order to improve access to employment centers served by transit for low-wage workers.

3. ***Growth pattern informed by the Regional Housing Need Allocation*** (RHNA): The scenarios utilized the proposed RHNA approach[1] for setting a minimum level of growth in the jurisdictions to ensure each jurisdiction is doing a reasonable amount of fair share housing to meet the region's housing need. A minimum housing growth threshold for each jurisdiction was set at 40 percent of its household formation growth. The scenarios assume that RHNA, as a short term housing strategy through local general plans, will shape the long term development pattern through a minimum housing floor (jurisdictions would accommodate at least 40 percent of their future household formation). The income distribution component of the proposed RHNA methodology, which is intended to address housing affordability (whereby jurisdictions would move towards the regional distribution of income groups), was not applied for the scenarios. Analysis of regional income levels and distribution is pending.

[1] The Regional Housing Needs Allocation (RHNA) is a state mandated process for determining how many housing units, including affordable units, each community must plan to accommodate. See http://www.onebayarea.org/plan_bay_area/housing.htm for more information on RHNA.

Transit and Employment Criteria for Housing Distribution

TRANSIT TYPE	EXISTING JOB CENTER (10,000+ JOBS)	FOCUSED GROWTH 2035 HOUSING
BART, Muni Metro, VTA Light Rail	Yes	Increase to low-range Place Type density plus 25%
BART, Muni Metro, VTA Light Rail	No	Increase to low-range Place Type density plus 20%
Caltrain	Yes	Increase to low-range Place Type density plus 25%
Caltrain	No	Increase to low-range Place Type density plus 20%
ACE, Capitol Corridor, SMART, eBART, Dumbarton Rail	Yes	Increase to low-range Place Type density plus 10%
ACE, Capitol Corridor, SMART, eBART, Dumbarton Rail	No	Increase to low-range Place Type density plus 5%
BRT Corridors: El Camino Real, San Pablo Avenue, E.14th Street/Mission Bvd	Yes	Increase to low-range Place Type density plus 5%
BRT Corridors: El Camino Real, San Pablo Avenue, E.14th Street/Mission Bvd	No	Increase to low-range Place Type density
PDAs not on major corridors	Yes	Increase to low-range Place Type density plus 10%
PDAs not on major corridors	No	Increase to min Place Type density minus 10%

Focused Growth Scenario

For the Focused Growth Scenario, the level of growth in a PDA was taken as the higher of:

a. the planned level of growth in the PDA, based on jurisdictional feedback on the Initial Vision Scenario, and
b. the minimum level of growth based on the PDA's Place Type.

The minimum level of growth for a PDA was calculated by multiplying the minimum density for the PDA's Place Type by the redevelopable acreage in the PDA, which was assumed to be 10% of net acreage. The minimum density for each PDA was scaled up or down based on transit tiers and whether the PDA is an existing job center containing 10,000+ jobs. The table below shows the distribution rules for each transit tier/job center combination. If the planned level of growth in a PDA was lower than the minimum calculated for its Place Type, the growth for that PDA was increased to the calculated minimum.

At the city level, the share of growth within each jurisdictions' PDAs was capped at 95 percent of the jurisdiction's total growth.

Core Concentration Growth Scenario

For the Core Concentration Growth Scenario**,** growth was shifted to PDAs in the Inner Bay Area. First, housing growth was increased by 20 percent above Focused Growth Scenario levels for these PDAs. Next, housing levels were adjusted up or down based on a housing value factor for each jurisdiction. The housing value adjustment ranged from +15 to -15 percent, based on median home value. ABAG reduced growth in Outer Bay Area PDAs to the desired levels stated by local jurisdictions in their Initial Vision Scenario feedback.

At the city level, housing growth within the Outer Bay Area jurisdictions was reduced to account for the re-distribution of housing to Inner Bay Area PDAs. Housing levels in Inner Bay Area jurisdictions were kept at their Focused Growth Scenario levels or were increased slightly to account for an increase in their PDAs' housing levels, with the share of growth within each jurisdictions' PDAs capped at 95 percent of the jurisdiction's total growth.

Outer Bay Area Growth Scenario

To create the Outer Bay Area Growth Scenario, ABAG first estimated the potential job increase to each jurisdiction. ABAG continued the region's trend in recent decades of jobs shifting from inner to outer counties and from PDAs to outer areas. Within Alameda, Santa Clara and Contra Costa Counties, a share of professional and business growth was also shifted from the Inner Bay Area to Outer Bay Area jurisdictions.

ABAG increased housing growth in those Outer Bay Area jurisdictions that saw significant job growth. Outer Bay Area jurisdictions that had more than 3,000 new jobs received a 30% increase in housing growth in their PDAs over the Focused Growth Scenario, those that grew by 1,000 to 3,000 jobs received a 10% increase in their PDAs, and those that grew by less than 1,000 jobs received a 5% increase.

ABAG reduced growth in Inner Bay Area PDAs to the desired levels stated by local jurisdictions in their Initial Vision Scenario feedback. However, since the City and County of San Francisco did not request a reduction from the Initial Vision Scenario, ABAG reduced each San Francisco PDA's housing growth by 20%.

At the city level, Inner Bay Area jurisdictions' housing units were reduced to desired levels. These housing units were re-distributed to the Outer Bay Area jurisdictions based on each jurisdiction's share of regional growth. Outer Bay Area jurisdiction growth levels may also have increased to account for an increase in units within their PDAs. The share of jurisdictional growth in PDAs within the Outer Bay Area jurisdictions was capped at 85 percent.

Transportation Assumptions

The following transportation network assumptions, based in part on local jurisdictional feedback on the Initial Vision Scenario, were used to develop the three scenarios:

	Core Concentration	**Focused Growth**	**Outer Bay Area**
Bus service	▪ Increased frequency and capacity within Inner Bay and along main corridors ▪ Bus Rapid Transit service on El Camino Real and E.14th Street/ Mission Blvd.	▪ Increased frequency and capacity within Inner Bay and along main corridors ▪ Bus Rapid Transit service on El Camino Real, San Pablo Ave, and E.14th Street/ Mission Blvd.	▪ Increased frequency and capacity along main corridors and improved local bus service.
Rail	▪ Increased frequency and capacity along core network ▪ Expansion of commuter rail systems in Inner Bay	▪ Increased frequency and capacity along core network ▪ Expansion of commuter rail systems	▪ Expansion of commuter rail systems in Outer Bay
Commute patterns	▪ Increase transit trips within and between West Bay and East Bay. ▪ Reduce number of auto trips	▪ Increase transit trips within and between West Bay and East Bay. ▪ Reduce number of auto trips	▪ Reduce length of auto trips

APPENDIX II: TABLES

- Employment Growth by PDA and Jurisdiction
- Household Growth by PDA and Jurisdiction

Employment Growth by PDA and Jurisdiction

KEY
Jurisdiction (Bold Italic)
Priority Development Area
Growth Opportunity Area (italics)

Alameda County

Jursidiction or Area Name	Place Type	2010 Total Jobs	Core-Constrained 2010-2040 Job Growth	Focused 2010-2040 Job Growth	Outer Bay Area 2010-2040 Job Growth
Alameda		26,480	7,570	8,220	7,870
Naval Air Station	Transit Town Center	1,310	770	770	830
Northern Waterfront	*Transit Neighborhood*	1,290	460	470	260
Albany		5,070	1,410	1,350	1,000
San Pablo Avenue & Solano Avenue	*Mixed-Use Corridor*	2,880	920	830	560
Berkeley		73,780	22,300	22,100	21,430
Adeline Street	Mixed-Use Corridor	940	310	280	250
Downtown	City Center	14,220	6,750	5,970	6,240
San Pablo Avenue	Mixed-Use Corridor	2,430	730	690	670
South Shattuck	Mixed-Use Corridor	1,000	280	250	160
Telegraph Avenue	Mixed-Use Corridor	1,700	570	530	500
University Avenue	Mixed-Use Corridor	1,680	520	480	450
Dublin		17,490	4,950	5,520	9,890
Downtown Specific Plan Area	Suburban Center	4,620	1,030	1,130	1,400
Town Center	Suburban Center	320	220	220	270
Transit Center	Suburban Center	0	160	170	200
Emeryville		16,350	6,010	5,660	5,290
Mixed-Use Core	City Center	11,490	4,630	4,190	4,650
Fremont		89,280	26,360	26,320	27,770
Centerville	Transit Neighborhood	2,980	1,140	1,230	670
City Center	City Center	16,300	7,070	6,330	6,630
Irvington District	Transit Town Center	2,670	890	930	1,020
Ardenwood Business Park	*Employment Center*	1,970	610	680	530
Fremont Boulevard & Warm Springs Boulevard Corridor	*Mixed-Use Corridor*	9,710	3,350	3,050	2,910
Fremont Boulevard Decoto Road Crossing	*Mixed-Use Corridor*	270	90	90	80
South Fremont/Warm Springs	*Suburban Center*	7,940	1,990	2,060	1,940
Hayward		63,960	16,050	16,650	17,440
Downtown	City Center	6,200	1,950	1,790	1,820
South Hayward BART	Mixed-Use Corridor	330	140	140	120
South Hayward BART	Urban Neighborhood	480	320	300	280
The Cannery	Transit Neighborhood	1,190	360	400	320
Carlos Bee Quarry	*Mixed-Use Corridor*	0	40	40	40
Mission Corridor	*Mixed-Use Corridor*	1,450	470	440	410
Livermore		47,200	13,540	15,090	20,130
Downtown	Suburban Center	2,870	910	960	1,180
Vasco Road TOD	Suburban Center	5,910	1,220	1,410	1,790
Newark		16,820	4,170	4,440	4,420
Dumbarton Transit Oriented Development	Transit Town Center	1,200	370	370	380
Old Town Mixed Use Area	Transit Neighborhood	180	70	70	50
Cedar Boulevard Transit	*Transit Neighborhood*	170	100	90	70
Civic Center Re-Use Transit	*Transit Neighborhood*	510	150	160	200
Oakland		196,600	64,390	58,930	57,160
Coliseum BART Station Area	Transit Town Center	5,450	1,520	1,610	1,680
Downtown & Jack London Square	Regional Center	92,180	34,070	35,210	26,080
Eastmont Town Center	Urban Neighborhood	3,570	1,270	1,130	790
Fruitvale & Dimond Areas	Urban Neighborhood	8,490	2,920	2,690	2,190
MacArthur Transit Village	Urban Neighborhood	10,460	3,270	3,110	2,570
Transit Oriented Development Corridors	Mixed-Use Corridor	33,650	12,620	11,540	10,960
West Oakland	Transit Town Center	7,570	2,370	2,390	2,660
Piedmont		2,100	610	690	330
Pleasanton		52,510	14,580	16,150	21,510
Hacienda	Suburban Center	9,870	3,720	4,290	4,400
San Leandro		39,350	10,750	10,800	11,300
Bay Fair BART Transit Village	Transit Town Center	1,470	340	360	350
Downtown Transit Oriented Development	City Center	7,910	3,220	2,890	2,960
East 14th Street	Mixed-Use Corridor	7,500	2,660	2,390	2,300
Union City		19,260	4,650	4,790	4,620
Intermodal Station District	City Center	340	160	150	160
Mission Boulevard	*Mixed-Use Corridor*	20	20	20	20
Old Alvarado	*Mixed-Use Corridor*	470	210	190	180
Alameda County Unincorporated		23,480	6,420	6,960	6,170
Castro Valley BART	*Transit Neighborhood*	2,030	530	560	330
East 14th Street and Mission Boulevard Mixed Use Corridor	*Mixed-Use Corridor*	2,390	770	710	670

Employment Growth by PDA and Jurisdiction

Contra Costa County

Jursidiction or Area Name	Place Type	2010 Total Jobs	Core-Constrained 2010-2040 Job Growth	Focused 2010-2040 Job Growth	Outer Bay Area 2010-2040 Job Growth
Antioch		19,910	5,140	5,560	6,900
Hillcrest eBART Station	Suburban Center	20	150	170	170
Rivertown Waterfront	Transit Town Center	3,910	1,060	1,190	1,200
Brentwood		8,370	2,470	2,750	3,480
Clayton		2,280	610	670	1,000
Concord		50,570	13,890	15,070	18,900
Community Reuse Area	Regional Center	170	220	230	300
Community Reuse Area	Transit Neighborhood	0	550	600	710
Downtown BART Station Planning Area	*City Center*	6,910	2,160	2,400	2,550
North Concord BART Adjacent Employment Center	*Employment Center*	5,940	1,590	1,770	2,680
West Downtown Planning Area	*Mixed-Use Corridor*	3,300	1,010	1,140	1,380
Danville		12,750	3,490	3,780	4,850
El Cerrito		6,550	1,880	1,870	1,680
San Pablo Avenue Corridor	Mixed-Use Corridor	3,480	920	850	680
Hercules		4,390	1,400	1,500	1,970
Central Hercules	Transit Neighborhood	900	400	450	590
Waterfront District	Transit Town Center	1,280	400	430	450
Lafayette		10,330	2,990	3,280	4,200
Downtown	Transit Town Center	6,180	1,770	1,930	1,740
Martinez		32,020	6,960	7,860	8,860
Downtown	Transit Neighborhood	6,820	1,660	1,910	2,730
Moraga		4,180	1,270	1,380	1,890
Moraga Center	Transit Town Center	1,200	460	520	400
Oakley		3,760	1,130	1,210	2,110
Downtown	Transit Town Center	580	210	230	210
Employment Area	Suburban Center	730	220	230	270
Potential Planning Area	Transit Neighborhood	300	180	190	250
Orinda		5,200	1,560	1,730	2,350
Downtown	Transit Town Center	2,750	840	950	790
Pinole		6,600	1,740	1,870	2,490
Appian Way Corridor	Suburban Center	2,460	660	690	840
Old Town	Transit Town Center	1,410	360	390	400
Pittsburg		16,710	4,510	4,820	5,960
Downtown	Transit Neighborhood	1,560	620	650	1,010
Pittsburg/Bay Point BART Station	Transit Town Center	150	200	220	200
Railroad Avenue eBART Station	Transit Town Center	6,500	1,670	1,820	1,860
Pleasant Hill		19,490	6,080	6,760	8,440
Buskirk Avenue Corridor	Mixed-Use Corridor	3,510	1,170	1,360	1,680
Diablo Valley College	Transit Neighborhood	2,950	1,610	1,910	3,550
Richmond		34,290	10,130	10,220	8,720
Central Richmond	City Center	6,250	2,540	2,310	2,280
South Richmond	Transit Neighborhood	6,600	1,880	2,060	1,420
23rd Street	*Mixed-Use Corridor*	320	140	140	130
San Pablo Avenue Corridor	*Mixed-Use Corridor*	1,910	900	810	780
San Pablo		8,000	2,050	2,150	2,700
San Ramon		42,110	10,930	12,130	14,820
City Center	Suburban Center	11,290	1,980	2,190	2,830
North Camino Ramon	Transit Town Center	10,720	3,490	3,870	3,670
Walnut Creek		50,600	13,690	15,290	18,610
West Downtown	Suburban Center	7,410	2,670	3,060	3,050
Contra Costa County Unincorporated		14,740	4,500	4,930	6,380
Contra Costa Centre	Mixed-Use Corridor	3,470	890	1,050	1,200
Downtown El Sobrante	Mixed-Use Corridor	970	280	290	370
North Richmond	Transit Neighborhood	1,850	520	540	760
Pittsburg/Bay Point BART Station	Transit Neighborhood	400	340	360	420
West Contra Costa Transportation Advisory Committee: San Pablo Avenue Corridor	Mixed-Use Corridor	9,490	2,660	2,770	3,320

Employment Growth by PDA and Jurisdiction

Marin County

Jursidiction or Area Name	Place Type	2010 Total Jobs	Core-Constrained 2010-2040 Job Growth	Focused 2010-2040 Job Growth	Outer Bay Area 2010-2040 Job Growth
Belvedere		460	130	140	150
Corte Madera		6,840	1,760	1,880	2,000
Fairfax		2,430	650	700	760
Larkspur		8,250	2,270	2,460	2,590
Mill Valley		6,330	1,900	2,080	2,180
Novato		22,600	5,820	6,370	6,640
Ross		510	150	160	160
San Anselmo		4,160	1,210	1,320	1,380
San Rafael		42,000	11,040	12,030	12,310
Civic Center/North Rafael Town Center	Transit Town Center	5,800	1,730	1,940	1,770
Downtown	City Center	8,830	2,590	2,930	3,060
Sausalito		7,460	2,520	2,820	2,860
Tiburon		2,960	930	1,030	1,090
Marin County Unincorporated		10,860	3,320	3,620	3,740
Urbanized 101 Corridor	Transit Neighborhood	2,630	820	1,010	1,560
San Quentin	*Transit Neighborhood*	3,100	870	940	1,520

Napa County

Jursidiction or Area Name	Place Type	2010 Total Jobs	Core-Constrained 2010-2040 Job Growth	Focused 2010-2040 Job Growth	Outer Bay Area 2010-2040 Job Growth
American Canyon		2,480	610	630	920
Highway 29 Corridor	Mixed-Use Corridor	1,040	280	290	340
Calistoga		2,300	570	600	790
Napa		28,740	7,270	7,730	10,950
St. Helena		4,390	970	1,040	1,570
Yountville		1,440	400	430	610
Napa County Unincorporated		22,390	4,830	5,170	7,130

San Francisco County

Jursidiction or Area Name	Place Type	2010 Total Jobs	Core-Constrained 2010-2040 Job Growth	Focused 2010-2040 Job Growth	Outer Bay Area 2010-2040 Job Growth
San Francisco		550,340	206,920	179,140	126,990
19th Avenue	Transit Town Center	10,490	2,850	2,880	3,350
Balboa Park	Transit Neighborhood	2,540	810	870	910
Bayview/Hunters Point Shipyard/Candlestick Point	Urban Neighborhood	20,270	7,970	7,170	5,900
Downtown-Van Ness-Geary	Regional Center	300,220	114,920	94,080	57,350
Eastern Neighborhoods	Urban Neighborhood	60,230	22,950	20,680	16,040
Market & Octavia	Urban Neighborhood	29,780	8,760	7,900	4,810
Mission Bay	Urban Neighborhood	2,900	1,380	1,230	980
Mission-San Jose Corridor	Mixed-Use Corridor	12,030	4,740	4,300	4,050
Port of San Francisco	Mixed-Use Corridor	5,280	2,010	1,850	1,710
San Francisco/San Mateo Bi-County Area (with City of Brisbai	Transit Neighborhood	1,830	1,230	1,240	460
Transbay Terminal	Regional Center	7,680	4,480	3,870	2,340
Treasure Island	Transit Town Center	250	650	570	450
Citywide		96,840	33,720	31,390	28,630

Employment Growth by PDA and Jurisdiction

San Mateo County

Jursidiction or Area Name	Place Type	2010 Total Jobs	Core-Constrained 2010-2040 Job Growth	Focused 2010-2040 Job Growth	Outer Bay Area 2010-2040 Job Growth
Atherton		2,280	710	780	780
Belmont		7,400	2,520	2,470	2,560
Brisbane		6,270	1,780	1,910	2,160
San Francisco/San Mateo Bi-County Area (with San Francisco	Suburban Center	440	190	190	110
Burlingame		25,880	7,440	8,060	8,610
Burlingame El Camino Real	Transit Town Center	10,520	2,940	3,090	3,330
Colma		2,540	510	490	430
Daly City		19,370	5,840	5,930	5,810
Bayshore	Transit Town Center	980	430	440	450
Mission Boulevard	Mixed-Use Corridor	3,520	1,110	1,030	980
Citywide		12,670	3,430	3,730	3,410
East Palo Alto		2,670	880	920	920
Ravenswood	Transit Town Center	900	290	310	300
Woodland/Willow Neighborhood	*Urban Neighborhood*	170	130	100	110
Foster City		13,380	3,900	4,360	4,730
Half Moon Bay		4,940	1,260	1,370	1,410
Hillsborough		2,110	660	740	740
Menlo Park		41,320	11,090	12,080	12,370
El Camino Real Corridor and Downtown	Transit Town Center	5,200	1,520	1,650	1,780
Millbrae		6,910	2,140	2,000	1,990
Transit Station Area	Mixed-Use Corridor	1,280	450	410	390
Pacifica		5,690	1,550	1,680	1,680
Portola Valley		1,780	500	560	580
Redwood City		58,370	17,820	18,250	21,190
Downtown	City Center	7,920	3,100	2,740	2,640
Broadway	*Mixed-Use Corridor*	5,010	1,490	1,380	1,170
Middlefield	*Mixed-Use Corridor*	2,380	830	760	700
Mixed Use Waterfront	*Mixed-Use Corridor*	610	360	320	300
Veterans Corridor	*Mixed-Use Corridor*	3,880	1,220	1,120	1,010
San Bruno		12,110	3,960	3,720	3,850
Transit Corridors	Mixed-Use Corridor	6,390	2,170	1,990	1,700
San Carlos		16,050	4,990	4,890	5,170
Railroad Corridor	Transit Town Center	1,820	420	450	470
San Mateo		50,640	16,320	17,210	18,580
Downtown	City Center	3,900	1,420	1,310	1,520
El Camino Real	Mixed-Use Corridor	2,110	580	540	450
Rail Corridor	Transit Neighborhood	8,780	2,060	2,210	1,280
South San Francisco		38,490	11,410	12,030	13,490
Downtown	Transit Town Center	2,200	880	900	930
Lindenville Transit Neighborhood	*Transit Neighborhood*	2,530	1,180	1,330	310
Woodside		2,630	570	640	660
San Mateo County Unincorporated		11,110	3,810	3,950	4,970
City County Association of Governments of San Mateo County	Mixed-Use Corridor	68,720	22,870	21,200	18,430

Employment Growth by PDA and Jurisdiction

Santa Clara County

Jursidiction or Area Name	Place Type	2010 Total Jobs	Core-Constrained 2010-2040 Job Growth	Focused 2010-2040 Job Growth	Outer Bay Area 2010-2040 Job Growth
Campbell		23,950	6,300	6,700	6,590
Central Redevelopment Area	Transit Neighborhood	5,850	1,640	1,820	1,380
Winchester Boulevard Master Plan	*Transit Neighborhood*	1,110	280	310	200
Cupertino		20,990	6,660	6,630	6,360
Gilroy		17,730	4,200	4,490	8,420
Downtown	Transit Town Center	2,030	640	700	660
Los Altos		13,290	4,870	4,810	4,810
El Camino Real Corridor	*Mixed-Use Corridor*	2,710	1,200	1,080	1,020
Los Altos Hills		2,960	1,140	1,220	1,400
Los Gatos		18,900	5,250	5,570	5,370
Milpitas		38,820	10,610	11,360	10,720
Transit Area	Suburban Center	3,760	1,790	1,920	2,370
Hammond Transit Neighborhood	*Transit Neighborhood*	710	160	160	40
McCandless Transit Neighborhood	*Transit Neighborhood*	920	400	460	150
McCarthy Ranch Employment Center	*Employment Center*	1,440	340	370	270
Midtown Mixed-Use Corridor	*Mixed-Use Corridor*	720	310	290	270
Serra Center Mixed-Use Corridor	*Mixed-Use Corridor*	570	130	130	120
Tasman Employment Center	*Employment Center*	7,560	1,740	1,870	1,050
Town Center Mixed-Use Corridor	*Mixed-Use Corridor*	530	170	160	150
Yosemite Employment Center	*Employment Center*	7,000	1,730	1,890	1,340
Monte Sereno		530	200	220	220
Morgan Hill		16,370	4,090	4,450	7,160
Downtown	Transit Town Center	1,370	480	530	530
Mountain View		45,690	14,180	15,280	14,630
Whisman Station	Transit Neighborhood	710	310	340	310
Downtown	*Transit Town Center*	5,810	2,170	2,470	2,670
East Whisman	*Employment Center*	4,220	1,670	1,920	1,670
El Camino Real Corridor	*Mixed-Use Corridor*	3,950	1,460	1,330	1,240
Moffett Field/NASA Ames	*Suburban Center*	410	270	260	360
North Bayshore	*Suburban Center*	6,420	2,080	2,270	230
San Antonio Center	*Transit Town Center*	2,530	850	890	880
Palo Alto		75,380	26,630	27,820	19,360
California Avenue	Transit Neighborhood	2,770	1,260	1,390	680
El Camino Real Corridor	*Mixed-Use Corridor*	10,230	5,990	5,190	4,990
University Avenue/Downtown	*Transit Town Center*	12,830	4,080	4,530	4,840
San Jose		363,730	116,760	112,610	109,040
Berryessa Station	Transit Neighborhood	5,910	1,530	1,630	1,060
Communications Hill	Transit Town Center	3,440	1,010	1,050	1,060
Cottle Transit Village	Suburban Center	2,110	610	610	820
Downtown "Frame"	City Center	25,780	10,390	9,420	9,560
East Santa Clara/Alum Rock Corridor	Mixed-Use Corridor	10,970	2,910	3,250	3,930
Greater Downtown	Regional Center	27,820	21,250	23,630	13,650
North San Jose	Regional Center	78,840	37,840	31,970	24,660
West San Carlos and Southwest Expressway Corridors	Mixed-Use Corridor	8,260	3,860	3,250	3,390
Bascom TOD Corridor	*Mixed-Use Corridor*	1,220	480	450	390
Bascom Urban Village	*Mixed-Use Corridor*	1,830	710	640	590
Blossom Hill/Snell Urban Village	*Mixed-Use Corridor*	910	350	330	300
Camden Urban Village	*Mixed-Use Corridor*	5,120	1,500	1,480	1,420
Capitol Corridor Urban Villages	*Mixed-Use Corridor*	2,600	1,170	1,120	1,000
Capitol/Tully/King Urban Villages	*Suburban Center*	3,150	1,240	1,400	1,890
Oakridge/Almaden Plaza Urban Village	*Suburban Center*	4,860	1,380	1,400	1,650
Saratoga TOD Corridor	*Mixed-Use Corridor*	3,700	1,490	1,360	1,290
Stevens Creek TOD Corridor	*Mixed-Use Corridor*	4,550	1,500	1,410	1,280
Westgate/El Paseo Urban Village	*Suburban Center*	3,010	800	840	1,030
Winchester Boulevard TOD Corridor	*Mixed-Use Corridor*	4,350	2,000	1,800	1,680
Santa Clara		96,340	30,080	31,370	29,820
Central Expressway Focus Area	*City Center*	2,550	1,030	930	950
El Camino Real Focus Area	*Mixed-Use Corridor*	4,060	1,150	1,080	1,020
Great America Parkway Focus Area	*Urban Neighborhood*	2,030	1,300	1,150	880
Lawrence Station Focus Area	*Transit Neighborhood*	3,200	1,260	1,300	520
Santa Clara Station Focus Area	*City Center*	3,430	1,040	960	830
Tasman East Focus Area	*Transit Neighborhood*	560	310	320	180
Saratoga		9,850	3,580	3,920	3,890

Employment Growth by PDA and Jurisdiction

Santa Clara County (continued)

Jursidiction or Area Name	Place Type	2010 Total Jobs	Core-Constrained 2010-2040 Job Growth	Focused 2010-2040 Job Growth	Outer Bay Area 2010-2040 Job Growth
Sunnyvale		63,860	18,270	19,330	17,930
Downtown & Caltrain Station	Transit Town Center	3,310	1,550	1,380	1,320
El Camino Real Corridor	Mixed-Use Corridor	9,910	2,680	2,870	2,790
Lawrence Station Transit Village	Transit Neighborhood	3,800	1,410	1,540	1,700
East Sunnyvale ITR	*Mixed-Use Corridor*	2,510	760	710	690
Moffett Park	*Employment Center*	9,610	2,550	2,870	2,310
Peery Park	*Employment Center*	5,180	1,510	1,680	1,250
Reamwood Light Rail Station	*Employment Center*	960	230	250	190
Tasman Station ITR	*Mixed-Use Corridor*	1,290	510	470	440
Santa Clara County Unincorporated		3,510	1,360	1,640	1,720
Valley Transportation Authority: Cores, Corridors, and Station	*Mixed-Use Corridor*	172,750	77,640	74,000	60,440

Solano County

Jursidiction or Area Name	Place Type	2010 Total Jobs	Core-Constrained 2010-2040 Job Growth	Focused 2010-2040 Job Growth	Outer Bay Area 2010-2040 Job Growth
Benicia		14,160	3,630	3,950	4,990
Downtown	Transit Neighborhood	2,570	720	800	900
Northern Gateway	*Suburban Center*	1,830	490	540	600
Dixon		4,490	1,070	1,160	1,310
Fairfield		82,840	18,060	20,310	21,420
Downtown South (Jefferson Street)	Suburban Center	4,100	1,270	1,450	1,410
Fairfield-Vacaville Train Station	Transit Town Center	330	460	470	490
North Texas Street Core	Mixed-Use Corridor	1,410	440	450	530
West Texas Street Gateway	Mixed-Use Corridor	1,640	490	530	640
Rio Vista		2,010	470	540	610
Suisun City		3,510	1,010	1,110	1,280
Downtown & Waterfront	Transit Town Center	1,670	500	560	520
Vacaville		32,290	7,600	8,230	8,740
Allison Area	Suburban Center	1,040	150	180	240
Downtown	Transit Town Center	2,860	700	750	880
Vallejo		34,790	8,810	9,530	10,190
Waterfront & Downtown	Suburban Center	4,660	1,350	1,540	1,340
Solano County Unincorporated		5,840	1,320	1,420	1,640

Sonoma County

Jursidiction or Area Name	Place Type	2010 Total Jobs	Core-Constrained 2010-2040 Job Growth	Focused 2010-2040 Job Growth	Outer Bay Area 2010-2040 Job Growth
Cloverdale		1,840	470	510	560
Downtown/SMART Transit Area	Transit Town Center	980	300	330	330
Cotati		3,170	680	710	830
Downtown and Cotati Depot	Transit Town Center	560	170	180	-190
Healdsburg		6,330	1,660	1,790	2,070
Petaluma		27,880	7,920	8,660	10,300
Central, Turning Basin/Lower Reach	Suburban Center	2,710	750	810	970
Rohnert Park		12,600	3,200	3,400	3,770
Sonoma Mountain Village	Suburban Center	130	160	170	160
Santa Rosa		70,670	18,160	19,640	22,740
Downtown Station Area	City Center	8,390	2,370	3,160	3,390
Mendocino Avenue/Santa Rosa Avenue Corridor	Mixed-Use Corridor	27,500	7,070	8,050	9,700
Sebastopol Road Corridor	Mixed-Use Corridor	7,990	2,270	2,680	3,070
North Santa Rosa Station	*Suburban Center*	6,150	1,830	2,000	2,280
Sebastopol		4,980	1,270	1,340	1,470
Nexus Area	Transit Town Center	3,830	1,000	1,090	1,130
Sonoma		6,090	1,590	1,700	1,880
Windsor		5,630	1,410	1,530	1,920
Redevelopment Area	Suburban Center	1,180	450	500	530
Sonoma County Unincorporated		38,430	9,180	9,950	11,530
8th Street East Industrial Area	*Employment Center*	660	150	160	220
Airport/Larkfield Urban Service Area	*Suburban Center*	5,480	1,440	1,580	1,030
Penngrove Urban Service Area	*Rural Town Center*	320	120	120	170
The Springs	*Rural Mixed-Use Corridor*	3,220	1,020	1,090	1,260

Household Growth by PDA and Jurisdiction

KEY
Jurisdiction (Bold Italic)
Priority Development Area
Growth Opportunity Area (italics)

Alameda County

Jursidiction or Area Name	Place Type	2010 Total Households	Core-Constrained 2010-2040 HH Growth	Focused 2010-2040 HH Growth	Outer Bay Area 2010-2040 HH Growth
Alameda		30,120	6,800	5,810	5,720
Naval Air Station	Transit Town Center	1,090	5,250	4,420	4,420
Northern Waterfront	*Transit Neighborhood*	390	1,210	1,010	1,010
Albany		7,400	960	960	960
San Pablo Avenue & Solano Avenue	*Mixed-Use Corridor*	1,600	820	700	700
Berkeley		46,030	8,370	8,370	8,370
Adeline Street	Mixed-Use Corridor	620	310	260	260
Downtown	City Center	2,570	4,900	3,980	3,980
San Pablo Avenue	Mixed-Use Corridor	1,440	1,150	960	960
South Shattuck	Mixed-Use Corridor	310	130	110	110
Telegraph Avenue	Mixed-Use Corridor	990	510	430	430
University Avenue	Mixed-Use Corridor	1,560	710	580	580
Dublin		14,910	10,900	13,810	15,780
Downtown Specific Plan Area	Suburban Center	790	470	1,030	1,330
Town Center	Suburban Center	3,750	2,150	2,150	2,710
Transit Center	Suburban Center	620	2,580	2,580	3,350
Emeryville		5,690	5,660	5,230	5,240
Mixed-Use Core	City Center	3,530	5,370	5,010	5,010
Fremont		71,000	19,090	17,380	15,500
Centerville	Transit Neighborhood	5,570	1,880	1,600	1,030
City Center	City Center	6,870	6,580	5,540	2,490
Irvington District	Transit Town Center	4,390	2,380	2,020	2,020
Ardenwood Business Park	*Employment Center*	0	0	0	0
Fremont Boulevard & Warm Springs Boulevard Corridor	*Mixed-Use Corridor*	8,540	2,640	2,230	2,180
Fremont Boulevard Decoto Road Crossing	*Mixed-Use Corridor*	650	510	430	430
South Fremont/Warm Springs	*Suburban Center*	20	4,140	3,460	3,000
Hayward		45,370	15,480	15,480	15,480
Downtown	City Center	2,540	3,390	3,070	3,070
South Hayward BART	Mixed-Use Corridor	170	1,300	1,170	1,170
South Hayward BART	Urban Neighborhood	1,660	2,670	2,420	2,420
The Cannery	Transit Neighborhood	410	830	750	750
Carlos Bee Quarry	*Mixed-Use Corridor*	30	610	550	550
Mission Corridor	*Mixed-Use Corridor*	910	2,410	2,200	2,200
Livermore		29,130	9,120	11,210	12,550
Downtown	Suburban Center	920	2,860	2,860	3,700
Vasco Road TOD	Suburban Center	330	670	2,500	3,250
Newark		12,970	5,800	5,800	5,800
Dumbarton Transit Oriented Development	Transit Town Center	140	2,800	2,430	2,430
Old Town Mixed Use Area	Transit Neighborhood	580	440	380	380
Cedar Boulevard Transit	*Transit Neighborhood*	0	980	850	850
Civic Center Re-Use Transit	*Transit Neighborhood*	200	400	340	340
Oakland		153,790	58,720	57,720	46,210
Coliseum BART Station Area	Transit Town Center	3,440	2,510	2,250	2,130
Downtown & Jack London Square	Regional Center	10,630	10,650	9,490	9,490
Eastmont Town Center	Urban Neighborhood	5,960	2,460	2,250	1,100
Fruitvale & Dimond Areas	Urban Neighborhood	12,840	7,080	6,350	4,930
MacArthur Transit Village	Urban Neighborhood	8,030	4,140	3,710	3,370
Transit Oriented Development Corridors	Mixed-Use Corridor	60,970	22,640	20,470	14,620
West Oakland	Transit Town Center	9,030	6,300	5,720	5,720
Piedmont		3,800	630	630	630
Pleasanton		25,250	6,300	7,380	8,340
Hacienda	Suburban Center	1,270	2,820	3,120	4,050
San Leandro		30,720	7,120	7,120	7,120
Bay Fair BART Transit Village	Transit Town Center	630	820	730	730
Downtown Transit Oriented Development	City Center	3,930	3,930	3,490	3,490
East 14th Street	Mixed-Use Corridor	4,490	1,510	1,370	1,370
Union City		20,430	4,550	4,550	4,160
Intermodal Station District	City Center	1,030	880	750	650
Mission Boulevard	*Mixed-Use Corridor*	0	180	150	150
Old Alvarado	*Mixed-Use Corridor*	290	180	160	160
Alameda County Unincorporated		48,520	8,270	11,540	12,440
Castro Valley BART	*Transit Neighborhood*	1,400	570	500	160
East 14th Street and Mission Boulevard Mixed Use Corridor	*Mixed-Use Corridor*	6,740	2,060	1,820	1,790

Household Growth by PDA and Jurisdiction

Contra Costa County

Jursidiction or Area Name	Place Type	2010 Total Households	Core-Constrained 2010-2040 HH Growth	Focused 2010-2040 HH Growth	Outer Bay Area 2010-2040 HH Growth
Antioch		32,250	6,350	6,890	9,740
Hillcrest eBART Station	Suburban Center	150	2,430	2,430	2,680
Rivertown Waterfront	Transit Town Center	1,430	2,060	2,060	2,250
Brentwood		16,490	6,500	8,160	9,620
Clayton		4,010	530	530	530
Concord		44,280	16,740	17,280	24,620
Community Reuse Area	Regional Center	70	2,890	2,890	3,730
Community Reuse Area	Transit Neighborhood	0	9,030	9,030	11,740
Downtown BART Station Planning Area	*City Center*	2,080	3,910	3,910	5,030
North Concord BART Adjacent Employment Center	*Employment Center*	10	0	0	0
West Downtown Planning Area	*Mixed-Use Corridor*	0	600	600	770
Danville		15,420	2,630	2,880	3,100
El Cerrito		10,140	2,130	1,840	1,840
San Pablo Avenue Corridor	Mixed-Use Corridor	1,200	1,680	1,460	1,460
Hercules		8,120	4,650	4,650	4,880
Central Hercules	Transit Neighborhood	400	2,570	2,570	2,700
Waterfront District	Transit Town Center	640	1,090	1,090	1,150
Lafayette		9,220	1,500	1,650	1,780
Downtown	Transit Town Center	1,890	810	810	850
Martinez		14,290	2,300	2,550	2,760
Downtown	Transit Neighborhood	750	1,310	1,310	1,370
Moraga		5,570	1,010	1,100	1,190
Moraga Center	Transit Town Center	430	630	630	660
Oakley		10,730	3,750	3,870	11,980
Downtown	Transit Town Center	520	1,290	1,290	1,360
Employment Area	Suburban Center	560	980	980	1,030
Potential Planning Area	Transit Neighborhood	980	1,400	1,400	1,470
Orinda		6,550	940	980	1,010
Downtown	Transit Town Center	330	370	370	390
Pinole		6,780	2,130	2,630	3,760
Appian Way Corridor	Suburban Center	510	630	630	700
Old Town	Transit Town Center	680	230	390	430
Pittsburg		19,530	9,340	10,200	10,850
Downtown	Transit Neighborhood	1,600	2,180	2,180	2,270
Pittsburg/Bay Point BART Station	Transit Town Center	0	2,430	2,430	2,560
Railroad Avenue eBART Station	Transit Town Center	3,600	3,370	3,370	3,530
Pleasant Hill		13,710	4,490	5,770	6,900
Buskirk Avenue Corridor	Mixed-Use Corridor	1,670	170	700	760
Diablo Valley College	Transit Neighborhood	730	320	320	350
Richmond		36,090	12,250	12,250	12,140
Central Richmond	City Center	4,700	4,050	3,780	880
South Richmond	Transit Neighborhood	3,250	2,310	2,150	1,690
23rd Street	*Mixed-Use Corridor*	640	970	900	900
San Pablo Avenue Corridor	*Mixed-Use Corridor*	1,710	1,620	1,510	1,510
San Pablo		8,760	2,350	2,350	1,860
San Ramon		25,280	4,190	8,090	9,080
City Center	Suburban Center	480	630	1,410	1,830
North Camino Ramon	Transit Town Center	40	2,400	2,400	3,090
Walnut Creek		30,440	3,760	7,330	8,460
West Downtown	Suburban Center	1,270	1,960	1,960	2,480
Contra Costa County Unincorporated		57,710	9,320	9,920	10,450
Contra Costa Centre	Mixed-Use Corridor	1,780	450	450	470
Downtown El Sobrante	Mixed-Use Corridor	1,670	560	560	580
North Richmond	Transit Neighborhood	1,030	2,460	2,460	2,570
Pittsburg/Bay Point BART Station	Transit Neighborhood	1,020	3,940	3,940	4,130
West Contra Costa Transportation Advisory Committee: San Pablo Avenue Corridor	Mixed-Use Corridor	5,950	3,070	3,180	3,320

Household Growth by PDA and Jurisdiction

Marin County

Jursidiction or Area Name	Place Type	2010 Total Households	Core-Constrained 2010-2040 HH Growth	Focused 2010-2040 HH Growth	Outer Bay Area 2010-2040 HH Growth
Belvedere		930	60	60	60
Corte Madera		3,790	370	560	640
Fairfax		3,380	240	240	240
Larkspur		5,910	530	530	610
Mill Valley		6,080	500	500	500
Novato		20,280	1,570	1,600	1,610
Ross		800	70	70	70
San Anselmo		5,240	410	410	410
San Rafael		22,760	2,500	2,790	4,000
Civic Center/North Rafael Town Center	Transit Town Center	1,900	820	820	860
Downtown	City Center	2,420	1,170	1,840	1,930
Sausalito		4,110	260	280	300
Tiburon		3,730	300	300	300
Marin County Unincorporated		26,190	3,290	3,920	4,510
Urbanized 101 Corridor	Transit Neighborhood	4,290	580	2,190	2,290
San Quentin	*Transit Neighborhood*	110	1,530	1,530	1,610

Napa County

Jursidiction or Area Name	Place Type	2010 Total Households	Core-Constrained 2010-2040 HH Growth	Focused 2010-2040 HH Growth	Outer Bay Area 2010-2040 HH Growth
American Canyon		5,660	1,690	1,750	2,010
Highway 29 Corridor	Mixed-Use Corridor	400	1,660	1,660	1,740
Calistoga		2,020	120	120	130
Napa		28,170	2,660	3,160	3,600
St. Helena		2,400	120	120	120
Yountville		1,050	100	150	170
Napa County Unincorporated		9,580	830	990	1,140

San Francisco County

Jursidiction or Area Name	Place Type	2010 Total Households	Core-Constrained 2010-2040 HH Growth	Focused 2010-2040 HH Growth	Outer Bay Area 2010-2040 HH Growth
San Francisco		345,810	110,640	90,470	76,430
19th Avenue	Transit Town Center	4,790	3,080	2,490	2,490
Balboa Park	Transit Neighborhood	1,190	2,350	1,870	1,500
Bayview/Hunters Point Shipyard/Candlestick Point	Urban Neighborhood	10,470	15,000	12,030	9,790
Downtown-Van Ness-Geary	Regional Center	89,850	32,810	27,770	23,950
Eastern Neighborhoods	Urban Neighborhood	31,650	8,720	7,230	6,110
Market & Octavia	Urban Neighborhood	11,130	7,650	6,150	5,010
Mission Bay	Urban Neighborhood	3,200	3,280	2,630	2,140
Mission-San Jose Corridor	Mixed-Use Corridor	29,360	6,220	5,120	4,290
Port of San Francisco	Mixed-Use Corridor	110	2,900	2,300	1,840
San Francisco/San Mateo Bi-County Area (with City of Brisbai	Transit Neighborhood	1,510	8,370	6,630	5,320
Transbay Terminal	Regional Center	190	5,500	4,410	3,580
Treasure Island	Transit Town Center	590	9,240	7,320	5,880
Citywide		161,770	5,520	4,520	4,530

Household Growth by PDA and Jurisdiction

San Mateo County

Jursidiction or Area Name	Place Type	2010 Total Households	Core-Constrained 2010-2040 HH Growth	Focused 2010-2040 HH Growth	Outer Bay Area 2010-2040 HH Growth
Atherton		2,330	400	400	400
Belmont		10,580	1,390	1,390	1,390
Brisbane		1,820	1,580	1,580	300
San Francisco/San Mateo Bi-County Area (with San Francisco	Suburban Center	0	1,420	1,160	20
Burlingame		12,360	3,930	3,930	3,930
Burlingame El Camino Real	Transit Town Center	7,170	3,540	2,630	2,630
Colma		560	610	520	210
Daly City		31,090	7,470	7,470	5,700
Bayshore	Transit Town Center	1,550	2,420	2,060	2,060
Mission Boulevard	Mixed-Use Corridor	2,070	1,360	1,180	1,180
Citywide		27,470	3,690	4,230	2,460
East Palo Alto		6,940	3,050	3,050	3,050
Ravenswood	Transit Town Center	970	1,070	930	930
Woodland/Willow Neighborhood	*Urban Neighborhood*	1,290	1,230	1,110	1,110
Foster City		12,020	1,670	1,670	1,670
Half Moon Bay		4,150	700	700	700
Hillsborough		3,690	820	820	600
Menlo Park		12,350	3,050	3,050	2,450
El Camino Real Corridor and Downtown	Transit Town Center	1,010	1,030	770	770
Millbrae		7,990	2,890	2,180	2,180
Transit Station Area	Mixed-Use Corridor	270	1,960	1,460	1,460
Pacifica		13,970	1,110	1,110	1,110
Portola Valley		1,750	240	240	240
Redwood City		27,960	10,510	9,070	8,280
Downtown	City Center	990	5,320	4,150	4,150
Broadway	*Mixed-Use Corridor*	1,710	770	600	380
Middlefield	*Mixed-Use Corridor*	2,170	640	500	410
Mixed Use Waterfront	*Mixed-Use Corridor*	210	1,350	1,050	1,050
Veterans Corridor	*Mixed-Use Corridor*	150	990	770	770
San Bruno		14,700	4,670	4,670	4,220
Transit Corridors	Mixed-Use Corridor	4,140	3,330	2,800	2,800
San Carlos		11,520	2,400	2,400	2,340
Railroad Corridor	Transit Town Center	440	650	650	650
San Mateo		38,230	11,810	11,810	10,130
Downtown	City Center	500	650	520	520
El Camino Real	Mixed-Use Corridor	840	1,210	970	970
Rail Corridor	Transit Neighborhood	140	6,580	5,310	5,310
South San Francisco		20,940	7,610	6,300	7,430
Downtown	Transit Town Center	1,510	3,640	3,030	3,030
Lindenville Transit Neighborhood	*Transit Neighborhood*	0	860	710	710
Woodside		1,980	310	310	310
San Mateo County Unincorporated		20,910	5,910	5,910	5,090
City County Association of Governments of San Mateo County	Mixed-Use Corridor	38,460	15,470	12,420	10,560

Household Growth by PDA and Jurisdiction

Santa Clara County

Jursidiction or Area Name	Place Type	2010 Total Households	Core-Constrained 2010-2040 HH Growth	Focused 2010-2040 HH Growth	Outer Bay Area 2010-2040 HH Growth
Campbell		16,160	2,940	2,940	2,880
Central Redevelopment Area	Transit Neighborhood	1,140	1,430	1,180	1,180
Winchester Boulevard Master Plan	*Transit Neighborhood*	580	160	130	130
Cupertino		20,180	3,960	3,960	3,960
Gilroy		14,180	5,710	6,440	7,090
Downtown	Transit Town Center	880	1,600	1,600	2,060
Los Altos		10,750	2,160	2,160	2,160
El Camino Real Corridor	*Mixed-Use Corridor*	610	470	350	350
Los Altos Hills		2,830	730	730	730
Los Gatos		12,360	2,330	2,330	2,330
Milpitas		19,180	12,810	12,810	12,810
Transit Area	Suburban Center	750	8,140	6,910	6,910
Hammond Transit Neighborhood	*Transit Neighborhood*	300	690	580	580
McCandless Transit Neighborhood	*Transit Neighborhood*	0	410	340	340
McCarthy Ranch Employment Center	*Employment Center*	0	0	0	0
Midtown Mixed-Use Corridor	*Mixed-Use Corridor*	340	770	660	660
Serra Center Mixed-Use Corridor	*Mixed-Use Corridor*	210	40	40	10
Tasman Employment Center	*Employment Center*	0	0	0	0
Town Center Mixed-Use Corridor	*Mixed-Use Corridor*	0	860	730	730
Yosemite Employment Center	*Employment Center*	30	0	0	0
Monte Sereno		1,210	300	300	300
Morgan Hill		12,330	3,820	4,150	8,760
Downtown	Transit Town Center	510	1,200	1,200	1,550
Mountain View		31,960	15,120	12,460	11,020
Whisman Station	Transit Neighborhood	650	1,200	950	950
Downtown	*Transit Town Center*	1,170	1,200	960	960
East Whisman	*Employment Center*	250	290	230	230
El Camino Real Corridor	*Mixed-Use Corridor*	3,330	2,690	2,170	2,170
Moffett Field/NASA Ames	*Suburban Center*	180	2,770	2,210	1,940
North Bayshore	*Suburban Center*	350	2,640	2,110	1,330
San Antonio Center	*Transit Town Center*	1,480	3,580	2,870	2,870
Palo Alto		26,490	12,250	12,250	6,110
California Avenue	Transit Neighborhood	750	2,360	1,720	800
El Camino Real Corridor	*Mixed-Use Corridor*	4,090	5,380	3,930	1,570
University Avenue/Downtown	*Transit Town Center*	1,820	3,590	2,630	1,250
San Jose		301,370	133,030	130,890	116,500
Berryessa Station	Transit Neighborhood	1,850	5,540	5,100	4,640
Communications Hill	Transit Town Center	6,540	3,670	3,390	2,780
Cottle Transit Village	Suburban Center	0	3,390	3,120	2,840
Downtown "Frame"	City Center	16,980	12,660	11,710	10,720
East Santa Clara/Alum Rock Corridor	Mixed-Use Corridor	6,750	4,850	4,480	4,100
Greater Downtown	Regional Center	3,670	8,320	7,720	7,100
North San Jose	Regional Center	10,420	37,200	34,260	31,220
West San Carlos and Southwest Expressway Corridors	Mixed-Use Corridor	4,730	15,820	15,040	14,230
Bascom TOD Corridor	*Mixed-Use Corridor*	260	1,630	1,500	1,360
Bascom Urban Village	*Mixed-Use Corridor*	1,810	990	910	840
Blossom Hill/Snell Urban Village	*Mixed-Use Corridor*	700	1,280	1,180	1,070
Camden Urban Village	*Mixed-Use Corridor*	920	1,150	1,060	960
Capitol Corridor Urban Villages	*Mixed-Use Corridor*	4,210	7,270	6,700	6,110
Capitol/Tully/King Urban Villages	*Suburban Center*	1,410	2,610	2,400	2,190
Oakridge/Almaden Plaza Urban Village	*Suburban Center*	2,650	8,760	8,070	7,360
Saratoga TOD Corridor	*Mixed-Use Corridor*	2,710	1,310	1,200	1,100
Stevens Creek TOD Corridor	*Mixed-Use Corridor*	2,210	4,580	4,230	3,850
Westgate/El Paseo Urban Village	*Suburban Center*	1,010	2,920	2,690	2,450
Winchester Boulevard TOD Corridor	*Mixed-Use Corridor*	4,150	2,430	2,250	2,060
Santa Clara		43,020	24,260	21,130	20,350
Central Expressway Focus Area	*City Center*	0	4,640	3,880	3,880
El Camino Real Focus Area	*Mixed-Use Corridor*	1,650	1,300	1,110	1,110
Great America Parkway Focus Area	*Urban Neighborhood*	0	3,940	3,300	3,300
Lawrence Station Focus Area	*Transit Neighborhood*	0	7,190	6,020	6,020
Santa Clara Station Focus Area	*City Center*	450	3,890	3,260	3,260
Tasman East Focus Area	*Transit Neighborhood*	0	2,090	1,750	1,750
Saratoga		10,730	2,250	2,250	2,250

Household Growth by PDA and Jurisdiction

Santa Clara County (continued)

Jursidiction or Area Name	Place Type	2010 Total Households	Core-Constrained 2010-2040 HH Growth	Focused 2010-2040 HH Growth	Outer Bay Area 2010-2040 HH Growth
Sunnyvale		53,380	16,780	16,780	16,780
Downtown & Caltrain Station	Transit Town Center	1,730	1,840	1,510	1,510
El Camino Real Corridor	Mixed-Use Corridor	10,350	5,310	4,400	4,400
Lawrence Station Transit Village	Transit Neighborhood	1,560	2,900	2,380	2,380
East Sunnyvale ITR	*Mixed-Use Corridor*	0	3,340	2,730	2,730
Moffett Park	*Employment Center*	20	0	0	0
Peery Park	*Employment Center*	110	10	10	10
Reamwood Light Rail Station	*Employment Center*	0	0	0	0
Tasman Station ITR	*Mixed-Use Corridor*	850	1,660	1,350	1,350
Santa Clara County Unincorporated		28,080	7,540	10,480	13,090
Valley Transportation Authority: Cores, Corridors, and Station	*Mixed-Use Corridor*	68,650	43,880	42,860	38,920

Solano County

Jursidiction or Area Name	Place Type	2010 Total Households	Core-Constrained 2010-2040 HH Growth	Focused 2010-2040 HH Growth	Outer Bay Area 2010-2040 HH Growth
Benicia		10,690	1,190	1,190	1,440
Downtown	Transit Neighborhood	530	1,010	1,010	1,100
Northern Gateway	*Suburban Center*	0	120	120	140
Dixon		5,860	1,390	1,680	1,940
Fairfield		34,480	11,960	12,520	14,420
Downtown South (Jefferson Street)	Suburban Center	600	380	910	950
Fairfield-Vacaville Train Station	Transit Town Center	90	6,510	6,510	6,820
North Texas Street Core	Mixed-Use Corridor	1,600	1,880	1,880	1,970
West Texas Street Gateway	Mixed-Use Corridor	1,020	2,590	2,590	2,720
Rio Vista		3,450	1,420	1,900	2,330
Suisun City		8,920	1,360	1,180	1,500
Downtown & Waterfront	Transit Town Center	1,090	1,190	1,190	1,240
Vacaville		31,090	4,940	1,430	9,950
Allison Area	Suburban Center	550	140	570	590
Downtown	Transit Town Center	220	750	750	780
Vallejo		40,560	5,490	5,320	5,780
Waterfront & Downtown	Suburban Center	980	870	870	910
Solano County Unincorporated		6,710	990	5,640	1,340

Sonoma County

Jursidiction or Area Name	Place Type	2010 Total Households	Core-Constrained 2010-2040 HH Growth	Focused 2010-2040 HH Growth	Outer Bay Area 2010-2040 HH Growth
Cloverdale		3,180	960	1,040	1,090
Downtown/SMART Transit Area	Transit Town Center	1,040	810	900	940
Cotati		2,980	460	470	540
Downtown and Cotati Depot	Transit Town Center	830	450	450	470
Healdsburg		4,380	860	980	1,080
Petaluma		21,740	2,800	2,800	2,800
Central, Turning Basin/Lower Reach	Suburban Center	750	1,610	1,610	1,760
Rohnert Park		15,810	2,870	3,210	3,490
Sonoma Mountain Village	Suburban Center	200	2,140	2,140	2,350
Santa Rosa		63,590	15,170	18,150	22,620
Downtown Station Area	City Center	2,080	1,220	6,860	7,540
Mendocino Avenue/Santa Rosa Avenue Corridor	Mixed-Use Corridor	6,910	1,590	4,280	4,670
Sebastopol Road Corridor	Mixed-Use Corridor	2,750	3,250	3,250	3,560
North Santa Rosa Station	*Suburban Center*	3,940	3,350	3,350	3,660
Sebastopol		3,280	480	520	600
Nexus Area	Transit Town Center	1,150	200	500	520
Sonoma		4,960	520	520	520
Windsor		8,970	1,330	1,360	3,930
Redevelopment Area	Suburban Center	2,040	1,290	1,290	1,350
Sonoma County Unincorporated		56,950	7,640	8,330	8,940
8th Street East Industrial Area	*Employment Center*	80	20	20	20
Airport/Larkfield Urban Service Area	*Suburban Center*	2,850	1,110	1,250	1,380
Penngrove Urban Service Area	*Rural Town Center*	630	670	670	730
The Springs	*Rural Mixed-Use Corridor*	6,580	1,680	1,680	1,810