



Employment Distribution Patterns and the SCS

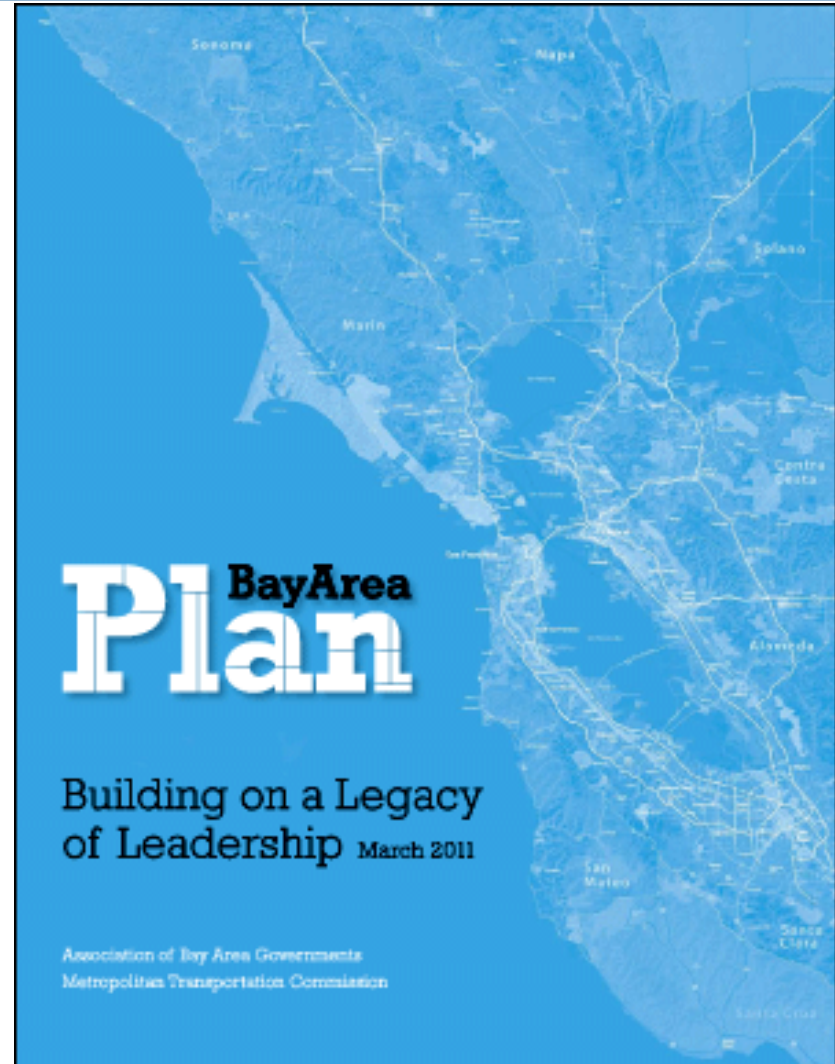
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SCS Regional Advisory Working Group
February 7, 2012

San Francisco Bay Area: Sustainable Communities Strategy

- Integration of land use, transportation, and affordable housing
- Focusing future growth near transit
- Locally identified areas to accommodate growth



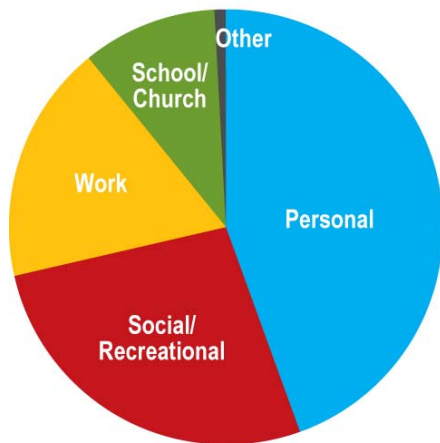
Key Themes Linking Employment Growth to the SCS



- The spatial pattern of employment growth
- The kinds of economic sectors that are growing and their viability for transit oriented locations
- The integral relationship between the commute trip and transit ridership

Commute Trips are Key to A Viable Transit System

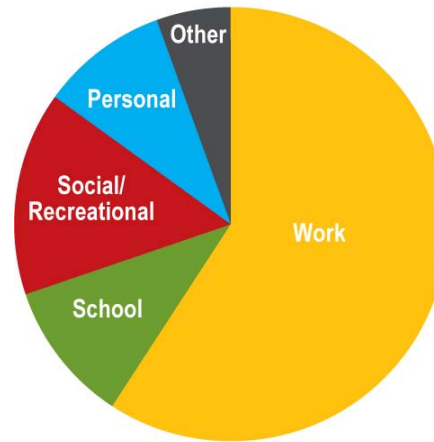
Work Trips are Less than 20% of Total Trips



Trip Purpose	% Of Trips
Personal	44.5
Social/ Recreational	26.9
Work	17.8
School/Church	9.8
Other	0.9

Source: *Commuting in America III*

Work Trips Fundamental to Transit Commute (60%)



Transit Trip Purpose	% Of Trips
Work	59.2
School	10.7
Social/ Recreational	15.3
Personal	9.3
Other	5.7

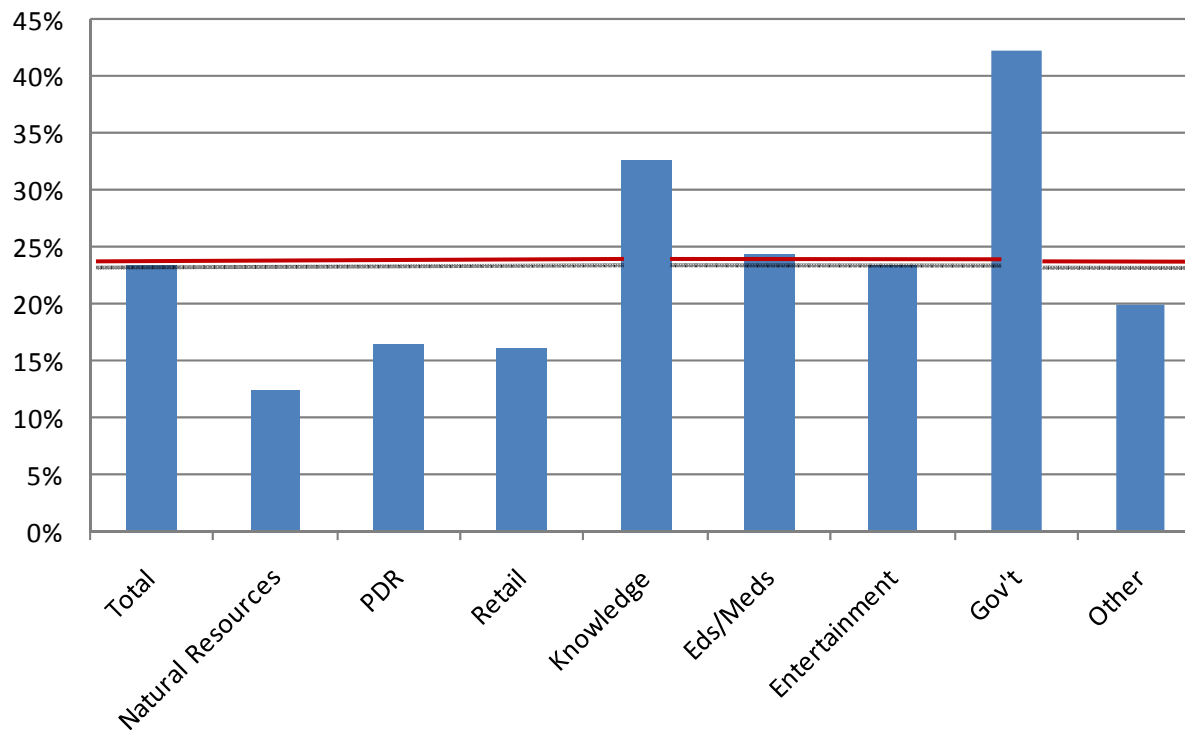
Source: 2007 APTA Transit Factbook

- By a wide margin, the largest group of transit trips are commute trips
- Commuters are key to transit's productivity

Source: Pisarski, *Commuting in America*

National Profile of Employment Near Transit

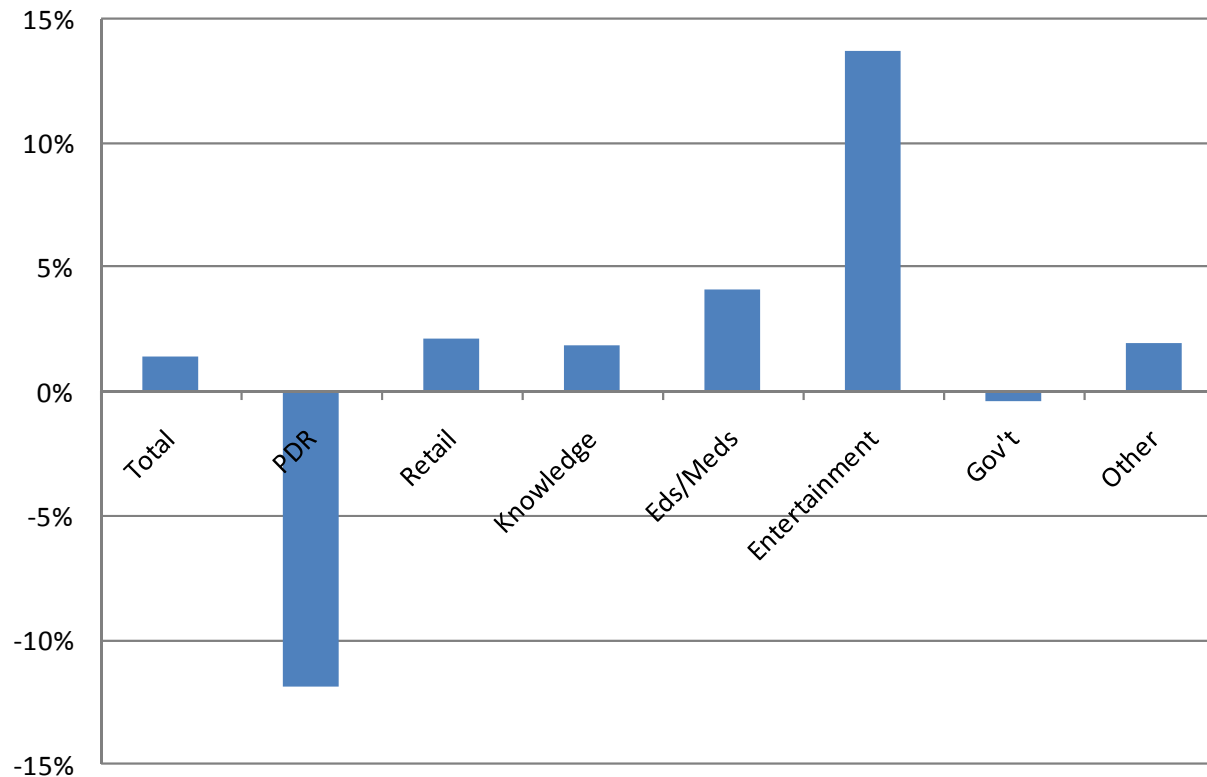
Transit Zone Capture Rate by Sector Group, 2008



Source: LEHD 2008, Center for Transit Oriented Development 2010

From 2002-2008 Employment Near Transit Increased Slightly in Absolute Numbers

Change in Total Transit Zone Employment by Sector Group, 2002-2008



Source: LEHD 2008, Center for Transit Oriented Development 2010

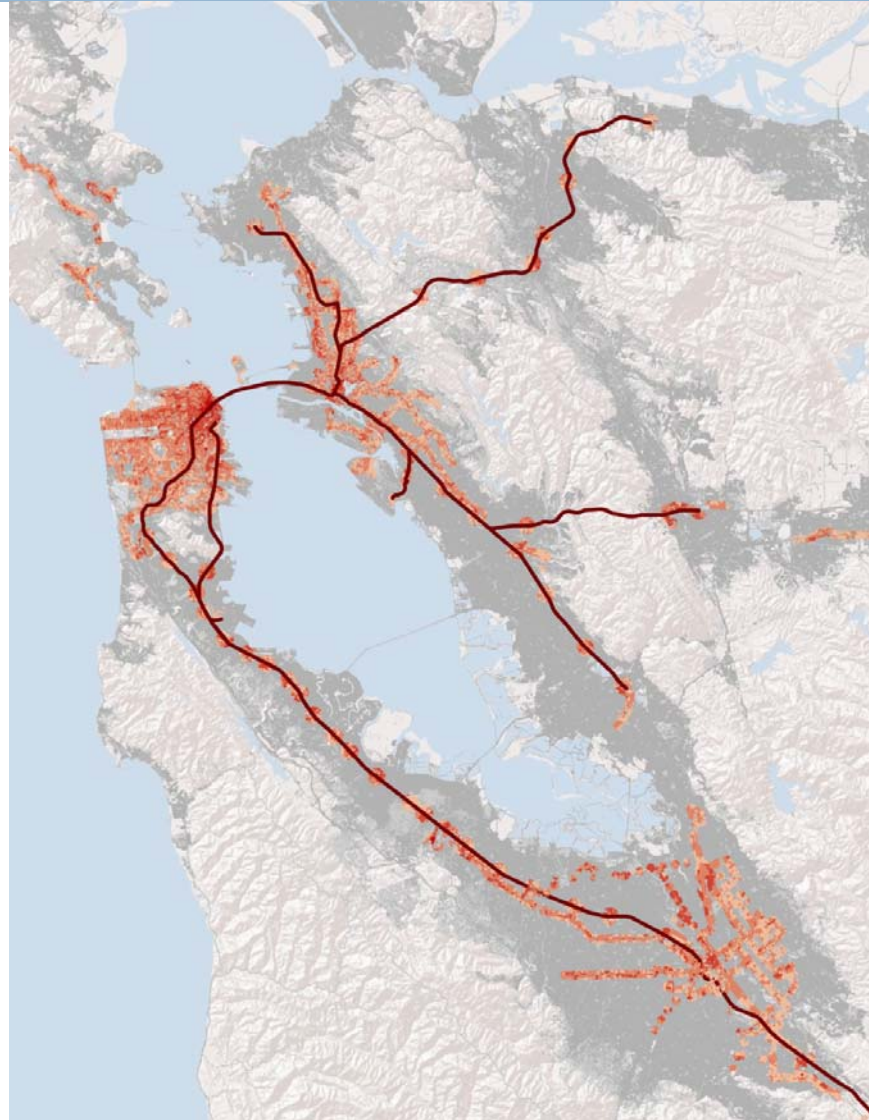
23% of Bay Area Jobs are within a ½ Mile of Regional Transit Stations



Employment Data Source:
National Establishment Time
Series (NETS)

Maps produced by Mark
Shorett, Arup

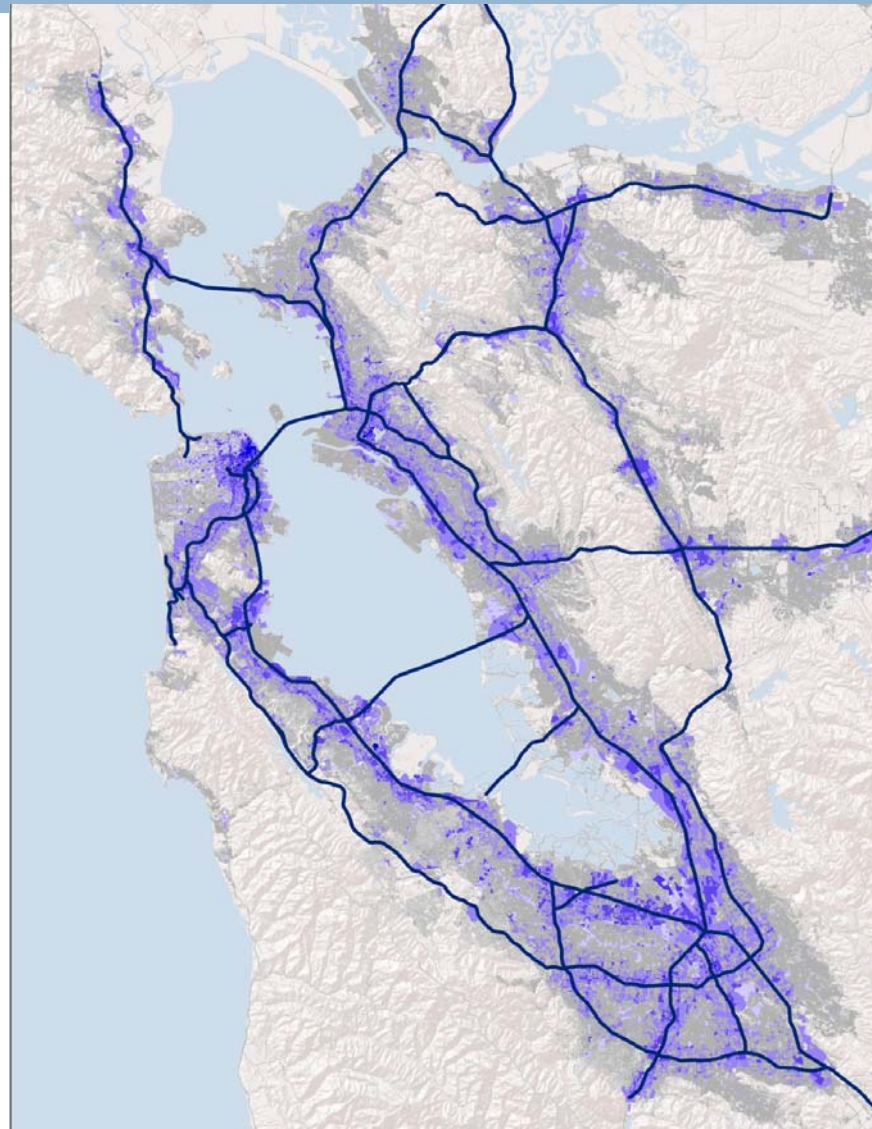
44% of Bay Area Jobs are within a ½ Mile of Regional Transit Stations or ¼ Mile of Frequent Local Bus



Employment Data Source:
National Establishment Time
Series (NETS)

Maps produced by Mark
Shorett, Arup

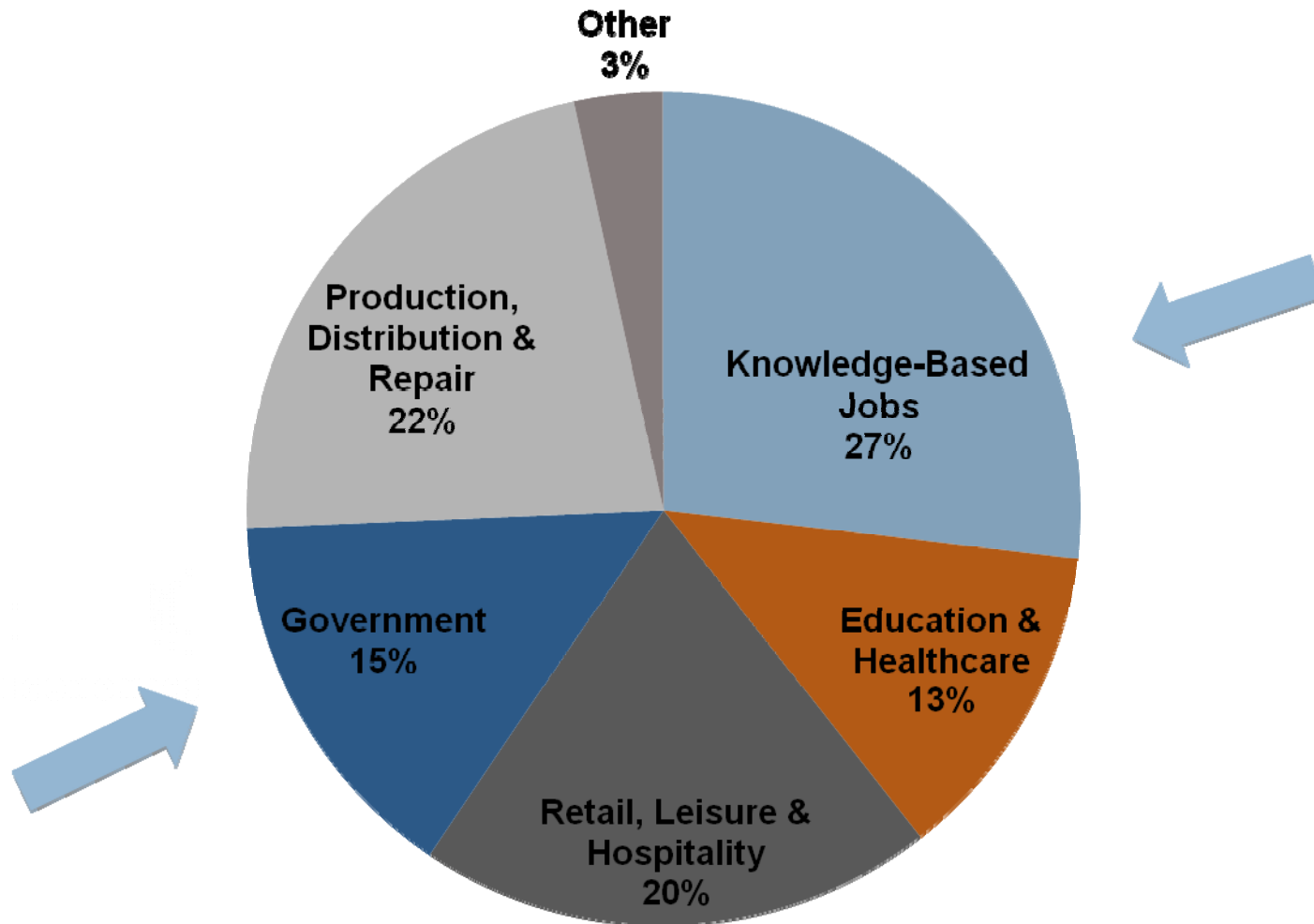
75 % of Bay Area Jobs are within a ½ Mile of Highway Off-Ramps



Employment Data Source:
National Establishment Time
Series (NETS)

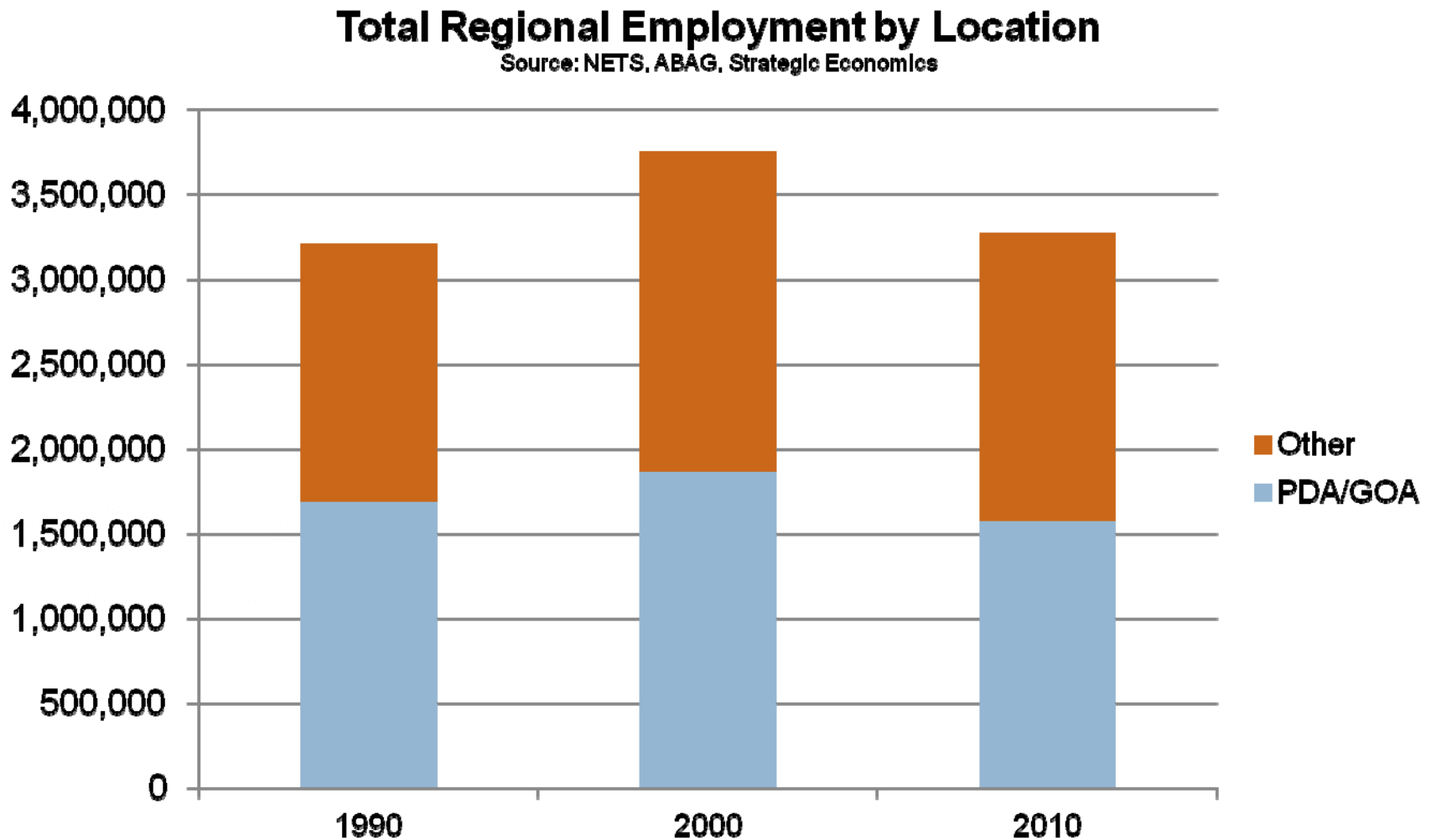
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Shorett, Arup

A Significant Share of Bay Employment Has a Propensity to Locate Near Transit



Sources: Caltrans/EDD, Strategic Economics, 2010

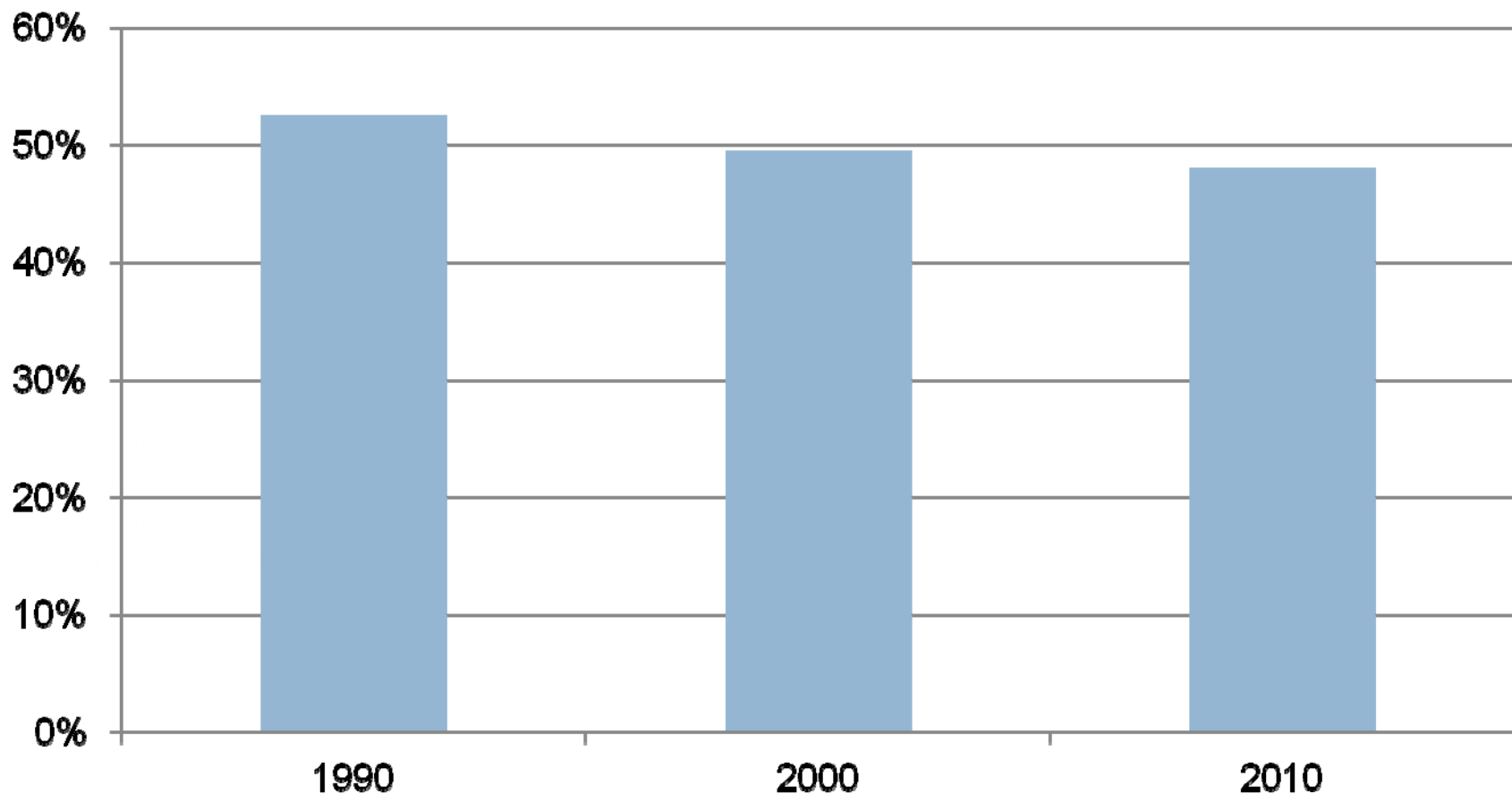
Bay Area Employment Near Transit Has Declined in Absolute Numbers Since 2000



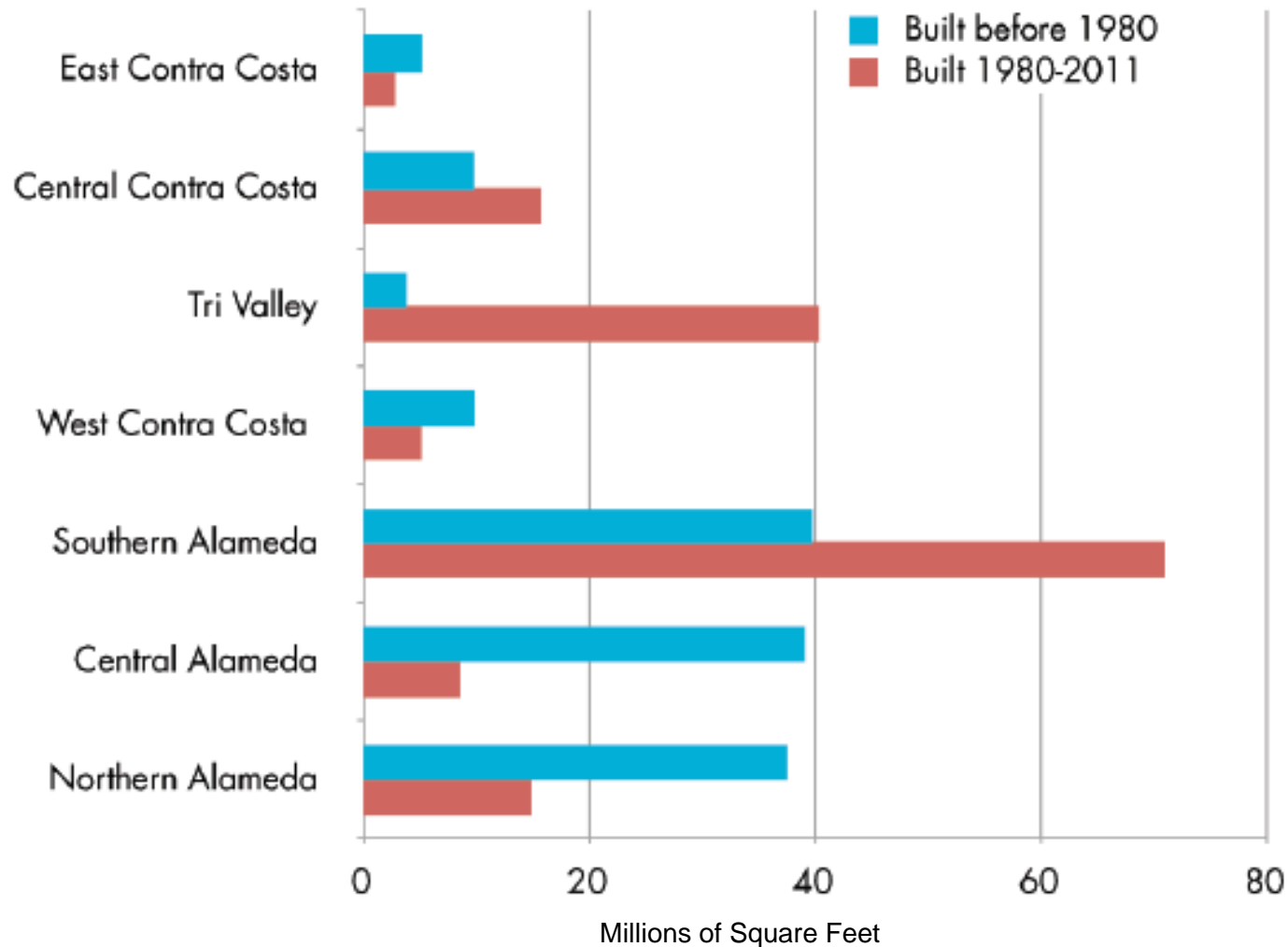
The share of jobs near transit has been consistently declining....

Share of Region's Jobs in PDAs and GOAs

Source: NETS, ABAG, Strategic Economics

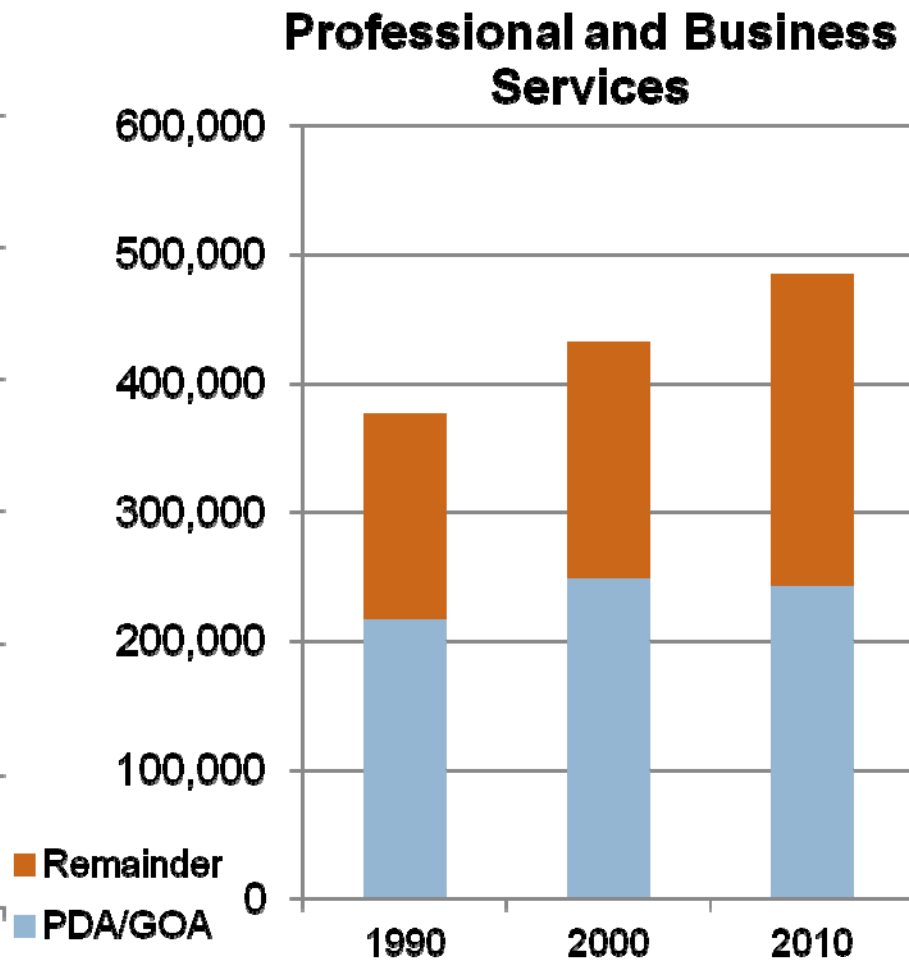
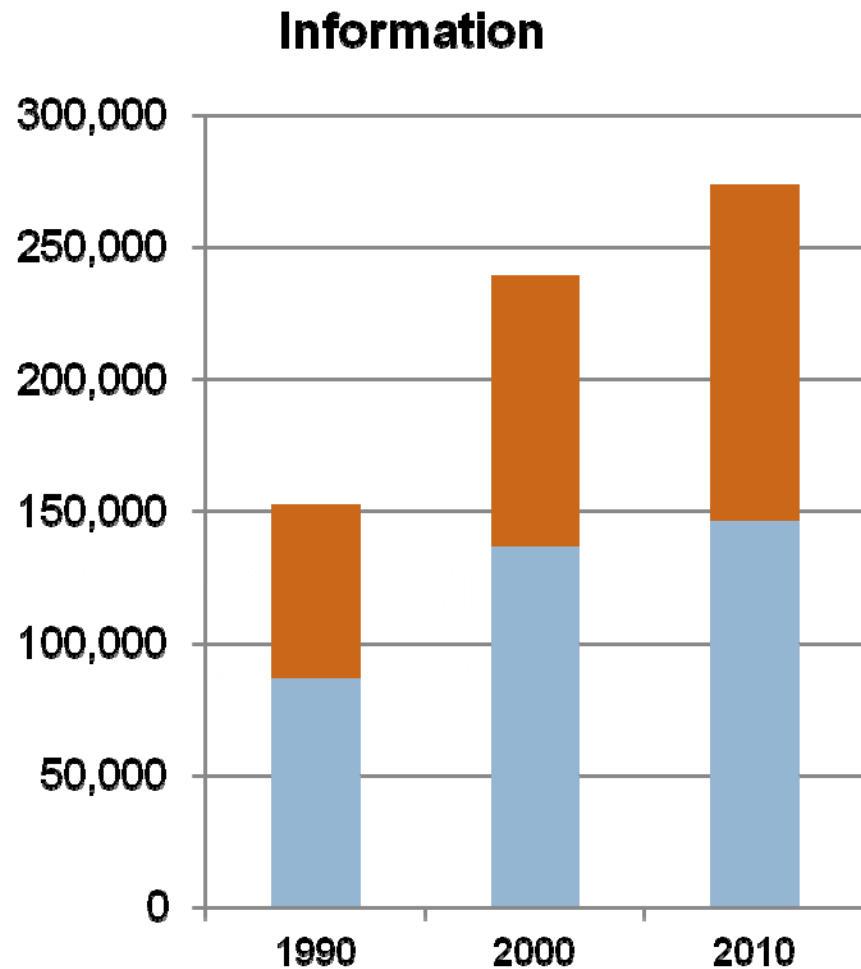


This Trend Towards Employment Dispersal Reflects Historic Building Trends in the Region

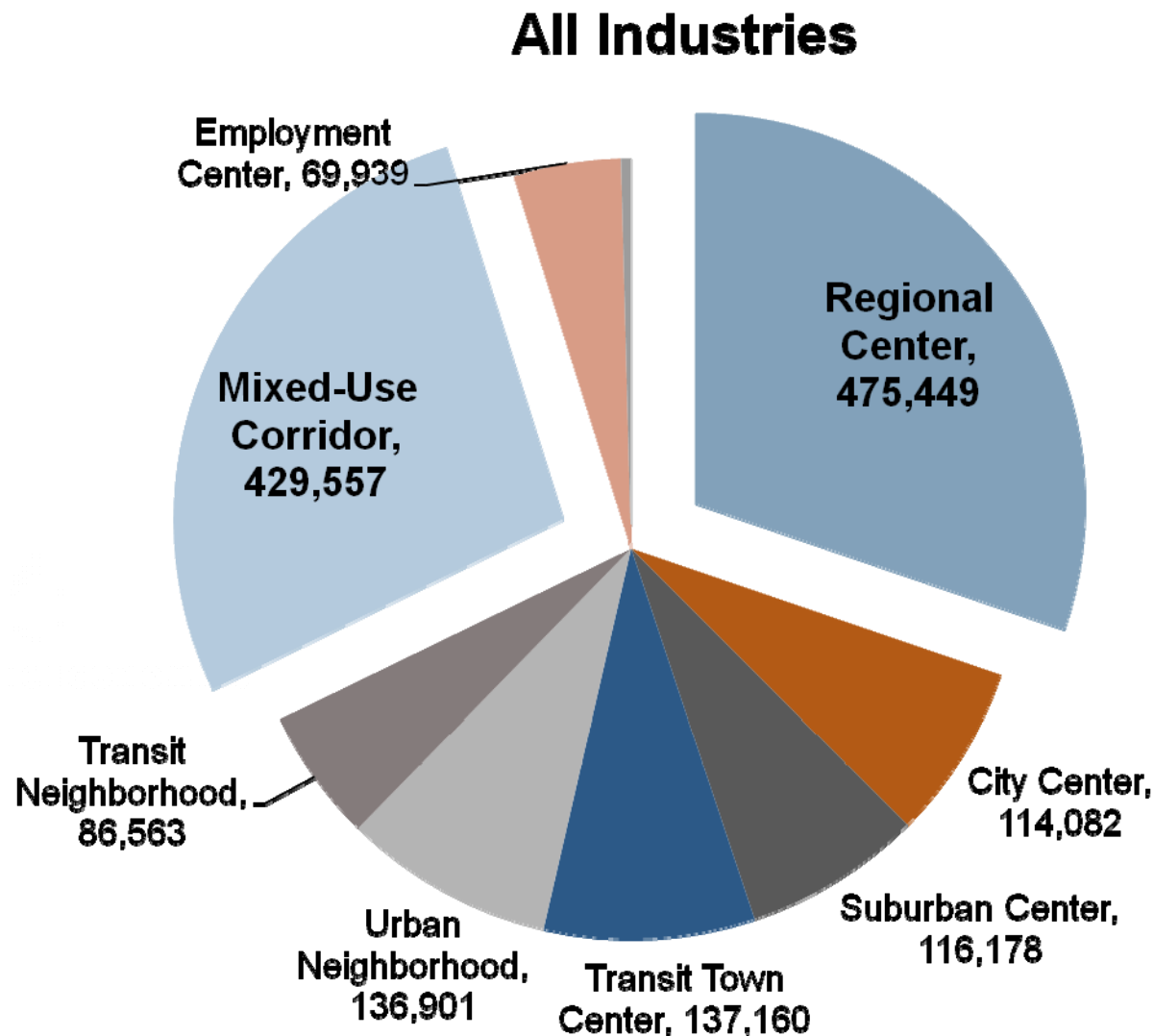


Source: CBRE, 2011; Colliers Parish, 2011; Strategic Economics, 2011

...At same time, “knowledge based” jobs have continued to grow in PDAs



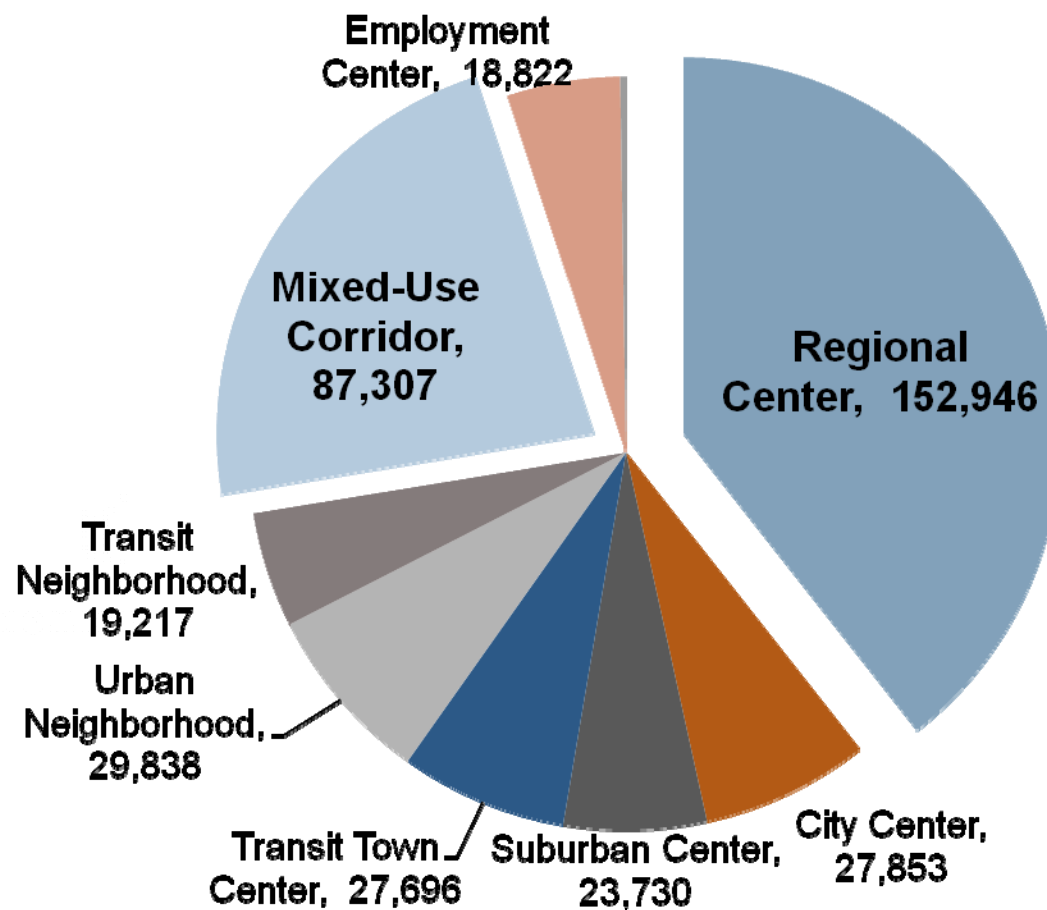
Over half of PDA jobs are in Regional Centers and Mixed-Use Corridors



Source: NETS, 2010;
ABAG, 2011

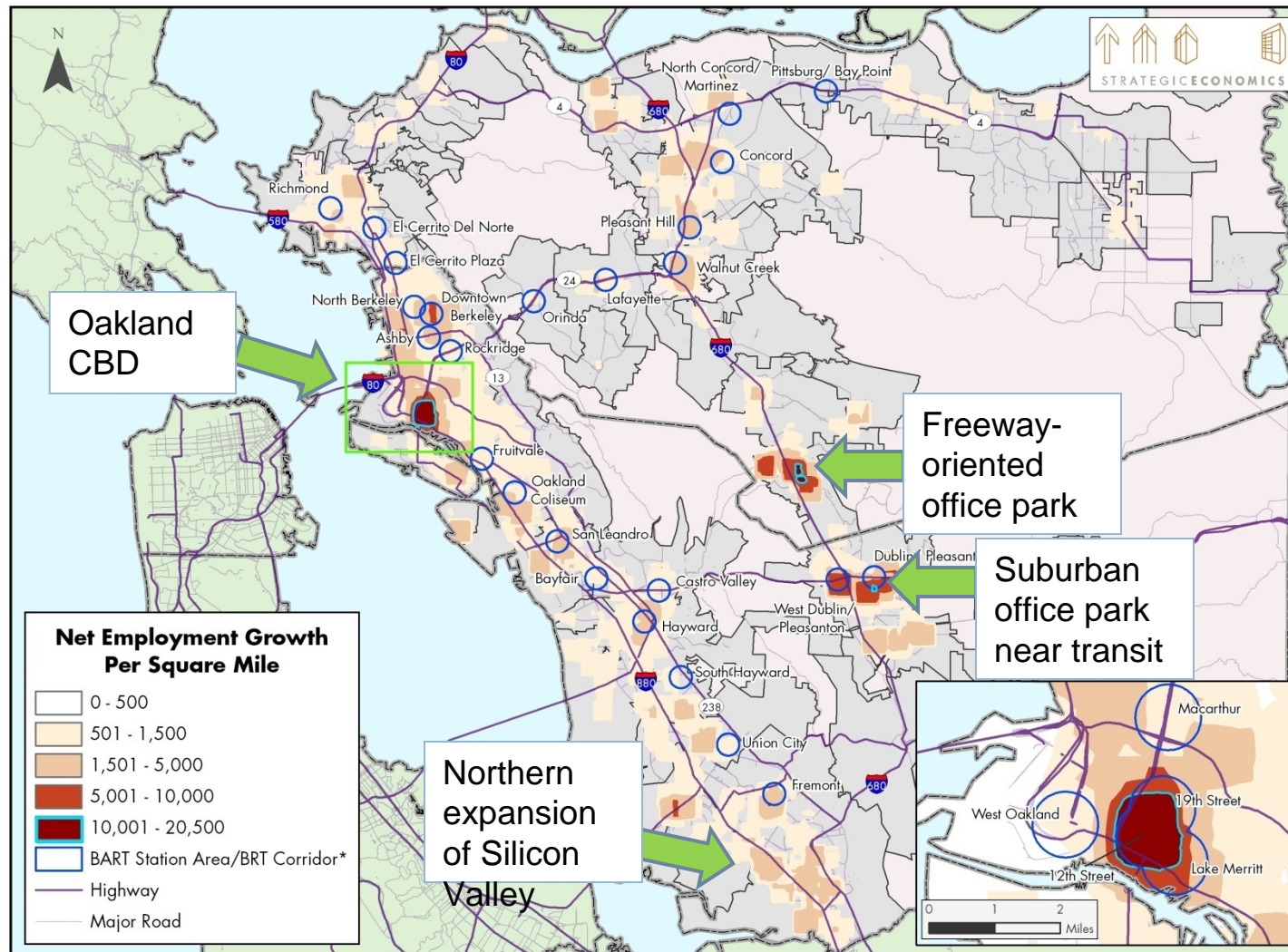
Knowledge Based Jobs Are Clustered in Regional Centers and Mixed-Use Corridors

Information, Prof & Business Services



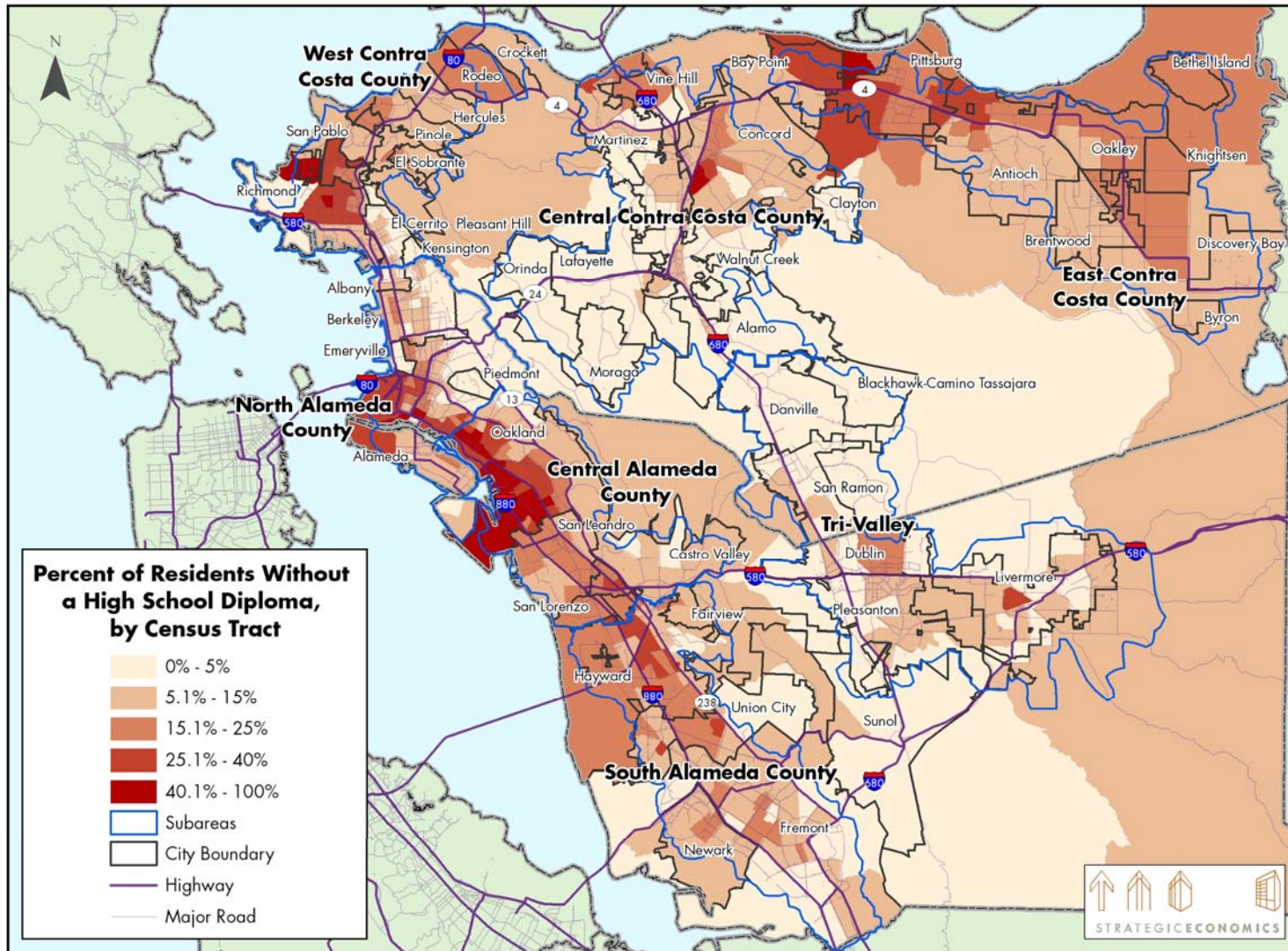
Source: NETS, 2010;
ABAG, 2011

The East Bay Case Study: Even Non-Transit Oriented Employment is Still Relatively Concentrated



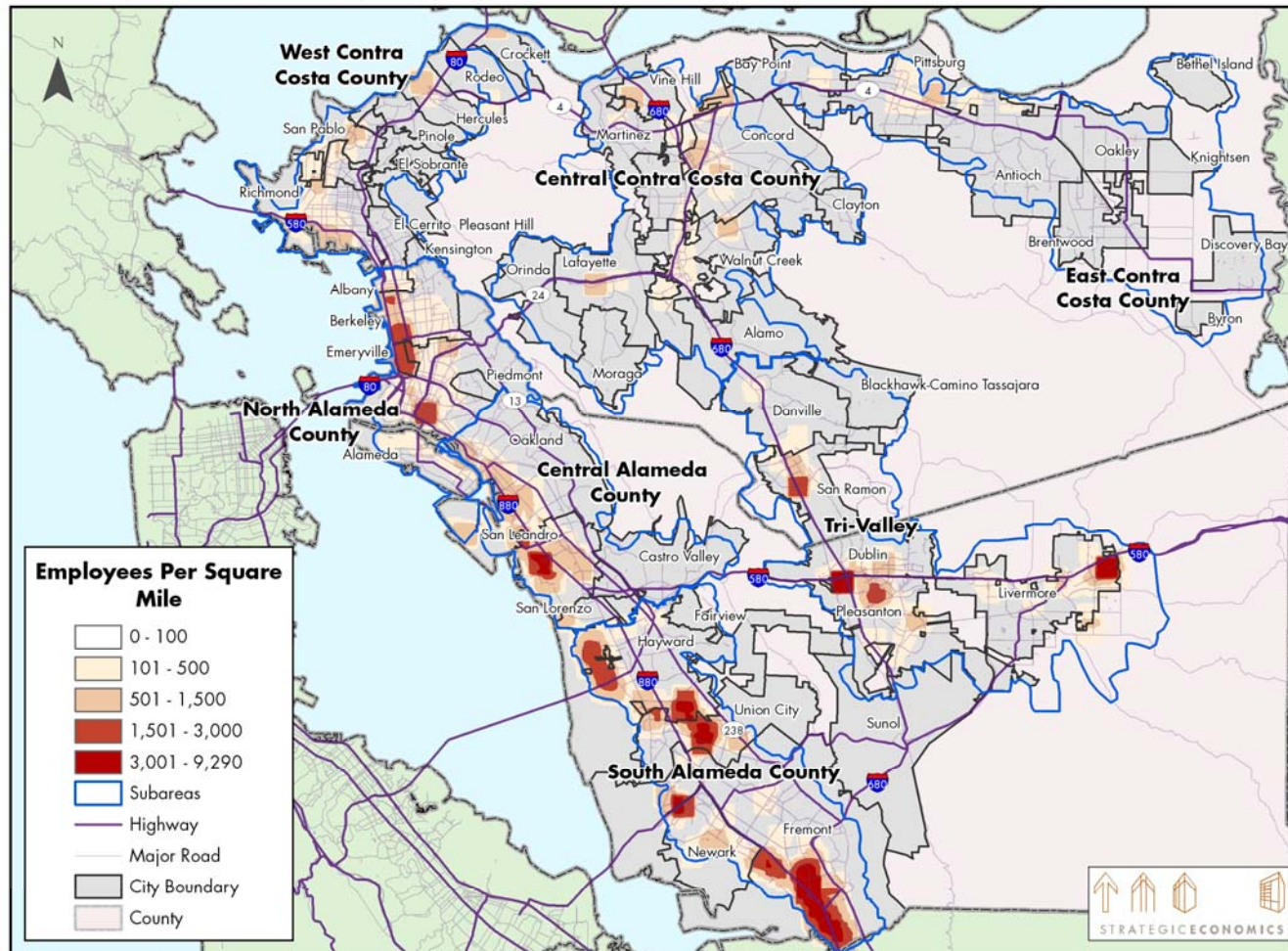
Source: Strategic Economics, 2011; Haveman Economic Consulting, 2011; National Establishment Time Series (NETS), 2009; US Census; ESRI; MTC.

Job Location Also Significant Implications for Work Force Development

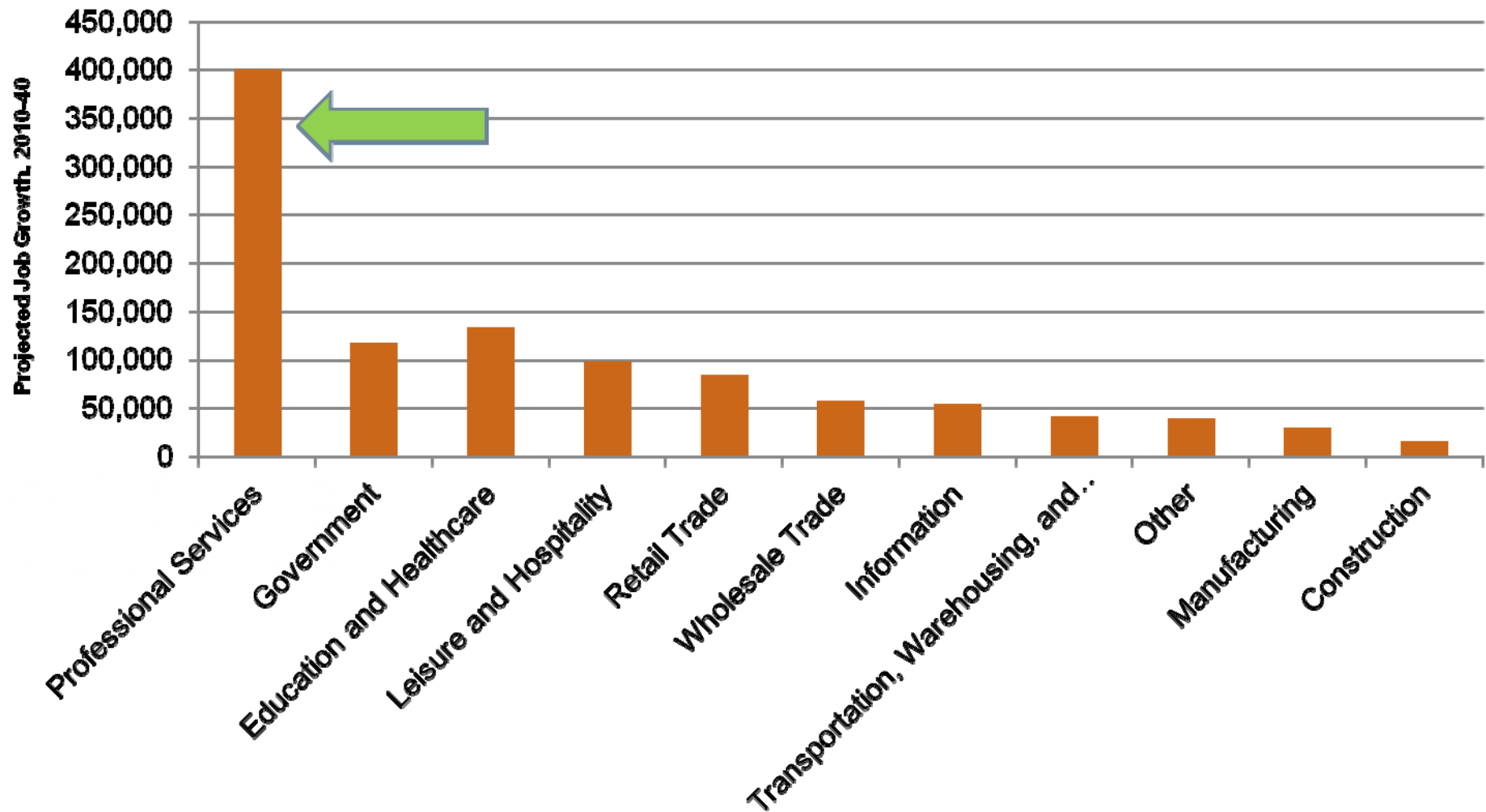


Manufacturing Remains an Important Sector, Especially in the East Bay, Need to Focus on More than Just the Knowledge Based Sectors

East Bay Manufacturing Employment Density, 2009



TOD-Supportive Sectors Are Forecast to Drive Future Job Growth in the Region – Good for the SCS



Source: Caltrans, 2010.

But, There Are Future Challenges:



- There are significant employment concentrations outside of the PDAs.
- We need to Identify regional investments that can impact business location decisions to foster agglomeration and recycle existing employment lands.
- Regional investments should support work accessibility for low skill workers as well as the general labor pool.
- But, we also need to recognize that all communities will not benefit equally from the “knowledge based” employment growth, and that a variety of strategies will be required to support other parts of the economy.