

# Draft BayArea Plan

March 2013

Strategy for a  
Sustainable  
Region

Pacific Ocean



Association of  
Bay Area  
Governments



Metropolitan  
Transportation  
Commission

Draft Forecast of  
Jobs, Population and Housing



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# **Draft Plan Bay Area**

## Forecast of Jobs, Population, & Housing

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## 1. INTRODUCTION

The Association of Bay Area Governments (ABAG) and the Metropolitan Transportation Commission (MTC) track and forecast the region's demographics and economic trends to inform and guide Plan Bay Area investments and policy decisions. This document explains the process used to develop the Plan Bay Area (the "Plan") growth forecasts and the Plan's projected distribution of this growth across the region. It describes the most recent planning assumptions used to develop the forecasts and the land use distribution, including local general plans and other factors.

The growth projections highlighted in this document reflect the best picture we have of what the Bay Area may look like in 2040, so that today's decisions align with tomorrow's expected transportation and housing needs. These forecasts form the basis for developing the regional land use plan and transportation investment strategy for Plan Bay Area.

### ***What the forecasts tell us:***

- Between 2010 and 2040, the nine-county San Francisco Bay Area is projected to add 1.1 million jobs, 2.1 million people and 660,000 homes, for a total of 4.5 million jobs, 9.3 million people and 3.4 million homes.
- Substantial shifts in housing preference are expected as the Bay Area population ages and becomes more diverse.
- As the Bay Area continues to recover from the lingering effects of the 2007-2009 recession, certain economic trends and indicators will likely rebound. For example, strong job growth is expected in the professional services, health and education, and leisure and hospitality sectors. Early indicators also suggest that the regional housing market is showing signs of recovery.
- Reflecting the distribution growth factors' emphasis on the existing transit network and connecting homes and jobs, San Francisco, San Mateo, Santa Clara and Alameda counties account for the majority of housing growth (77 percent) and job growth (76 percent)
- The Bay Area's three regional centers—San Francisco, San Jose, and Oakland—will accommodate 42 percent of housing growth and 38 percent of total job growth by 2040. Corridors in the inner Bay Area, including El Camino Real/The Grand Boulevard, San Pablo Corridor, and East 14th–International Boulevard, also represent a major share of both housing and job growth, accommodating 19 percent of regional housing and 11 percent of regional job growth.

## 2. REGIONAL FORECAST OF JOBS, POPULATION AND HOUSING

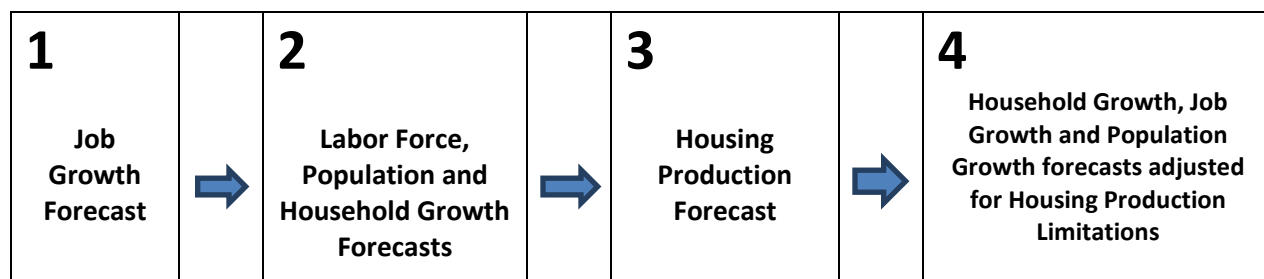
The basis of Plan Bay Area is its focus on employment, population and housing. . The Association of Bay Area Governments employed the Center for Continuing Study of the California Economy (CCSCE) to provide national, state and regional employment and population forecasts. The agency also hired Karen Chapple of the University of California, Berkeley (UC Berkeley), to provide a housing analysis and estimates as inputs to the ABAG housing forecast. The Metropolitan Transportation Commission employed the consulting firm Strategic Economics to provide industry sector locational preferences, which were used as inputs to the ABAG land use forecast.

### A FOUR-STEP PROCESS

The Association of Bay Area Governments developed the forecasts by following four steps (Figure 1):

1. **Potential job growth:** Job growth by 2040 for the Bay Area was estimated as a share of the U.S. Bureau of Labor Statistics' national growth projections, reflecting the difference in 2010 between national and regional labor force participation in various economic sectors, such as the professional services and retail sectors. This analysis was performed by CCSCE.
2. **Potential population and household growth:** The job growth forecast determines the population and number of households, as well as household income levels. ABAG, in consultation with CCSCE, translated the Bay Area job growth projection into labor force, total population and household forecasts. These forecasts were based on labor force participation rates and the number of persons per household by age and race cohorts.
3. **Housing production:** ABAG, in consultation with UC Berkeley, estimated regional housing production by 2040 based on past housing production levels, projected household income, and new policies and programs to support housing production in Priority Development Areas (PDAs).
4. **Feasible job, population and household growth:** ABAG adjusted for housing production limitations by 2040 that influence the number of workforce households that can be accommodated in the region. These housing production limitations, in turn, limit job growth in the region and reduce total population growth.

**Figure 1. Four-Step Process for developing Bay Area demographic forecasts**



## **RATIONALE FOR FORECAST METHODOLOGY**

The forecast prepared by CCSCE in February 2012 is an economic growth projection based upon national employment growth by major industry sector and the region's share of that growth based upon regional competitiveness in each industry. Because the region is heavily concentrated in a number of high-growth, high-technology industries, the projection assumes that the region remains attractive to a diverse and highly specialized labor force in the coming decades.

However, the Bay Area faces a number of potential constraints to economic competitiveness, including high housing costs in places close to employment centers, funding cuts to education and public services, and aging infrastructure in many places. Over the last three decades, much of the region's economic growth has been supported by the development of land in "greenfield" locations within the Bay Area and in the San Joaquin Valley region<sup>1</sup>. These areas accommodated substantial new housing, with expanding infrastructure and services, while many of the older cities circling the bay faced physical, market, and regulatory constraints to large-scale housing production.

The region's most concentrated job centers continue to be located in the major central business districts, downtowns, and transit corridors circling the bay. This spatial "mismatch" in the location of jobs and housing within the region has resulted in rising housing costs in many of the larger cities, increased time and travel costs for the many workers commuting from lower-cost communities, and growing congestion on major highways and freeways.

Plan Bay Area calls for reducing vehicle miles traveled (VMT) by encouraging infill development in the core, and improving transit access throughout the region. This

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<sup>1</sup> Reflecting this outward growth, in March 2013, the U.S. Census Bureau added San Joaquin County to the Census-defined San Jose-San Francisco-Oakland Combined Statistical Area that includes the nine-county San Francisco Bay Area as well as San Benito and Santa Cruz Counties.

envisioned development pattern would be a reversal of the dominant trends over the last several decades of housing and employment dispersal. There are several emerging trends that support the shift towards concentrating housing and job growth in the region's core. The first of these trends are the demographic changes projected to occur in the Bay Area, which include the aging of the "Baby Boomer" generation, as well as the maturing of the "Generation Y" generation, both of which are seen as driving demand for more compact, urban housing in the core.

Secondly, there is strong projected growth in key industries in technology and related sectors, which have shown a tendency to agglomerate in key locations within the core of the region, including San Francisco, the Silicon Valley, and other select places. The region is increasingly geographically constrained with fewer "greenfield" development sites left, and the traffic congestion on regional highways and interstates connecting to the Central Valley region is worsening. While these larger trends support shifting the new development to the core, the SCS also acknowledges the need to implement land use policies and make infrastructure investments at the local and regional levels to foster infill development and reduce the commute from outside the region.

With careful planning and supportive policies and investments described above, ABAG estimates an additional 660,000 housing units will be constructed in the region between 2010 and 2040, an average of 22,000 new units per year. This is based upon an analysis of production levels over the past several decades (20,000 units per year 1990-2010), challenges associated with increasing the inventory of multi-family housing brought to market, and the slow near-term recovery of employment and the housing market.

Using national and state data sources, ABAG developed assumptions regarding the population profile (including age and race/ethnicity), the number of employees per household, the labor force participation rate, vacancy rate, and other variables in order to derive the number of jobs that the region could support given the estimated 660,000 total number of housing units that can be produced with the policies and investments outlined in the May 2012 Jobs-Housing Connection Strategy.

Compared to Levy's estimate of 1.3 million new jobs from 2010 to 2040, the regional projection has slightly lower growth of 1.2 million jobs. This corresponds to 100,000 fewer jobs overall, but assumes that a greater proportion of the future workforce would be housed within the region, without relying on a historically increasing rate of in-commuters from outside of the region.

Based on this rationale, the overall regional growth forecast for Plan Bay Area relies on the following key assumptions:

- The Bay Area and national economies will be healthy, with an average unemployment rate of 5 percent or less and reasonably sufficient housing production for the workforce.
- A stronger link will be made between jobs and housing in locations sought by the workforce.
- Adjustments to the job growth forecast are needed to account for the region's expected level of housing production given historic trends and the constraints of an infill growth development pattern.
- The region will continue to receive historical levels of public funding for housing production.

## DATA, ASSUMPTIONS AND METHODS USED

The regional forecast of employment, population and housing to 2040 was developed in a Microsoft Excel-based model, utilizing Microsoft Access and ESRI ArcGIS databases to process, refine, and consolidate large datasets. The final regional forecast was validated by CCSCE, UC Berkeley, and Strategic Economics, external consultants hired by ABAG and MTC.

Summaries of the key historic data used to prepare the forecast, and the resulting projected values are shown in Table 1 and Table 2. Additional detail regarding data sources and uses, key variables, assumptions, and methods utilized to develop and validate the regional economic, population and housing forecast is provided below.

**Table 1. Key Regional Historic and Projected Population, Employment and Housing Data**  
(in millions)

	Historic			Projected		
	1990	2000	2010	2020	2030	2040
Housing Units		2.552	2.786	2.956	3.201	3.446
Households	2.251	2.466	2.608	2.838	3.073	3.308
Household Population	5.875	60641	7.003	7.624	8.314	9.085
Group Quarters Population	0.149	0.143	0.148	0.162	0.182	0.214
Total Population*	6.024	6.784	7.151	7.787	8.497	9.299
Labor Force	3.322	3.535	3.658	4.057	4.270	4.584
Employed Residents	3.152	3.377	3.269	3.850	4.052	4.350
Jobs	3.206	3.753	3.385	3.987	4.197	4.505

\*Total Population includes both group quarters population and household population

Sources: US Census (1990-2010), ABAG (2020-2040)



**Table 2: Key Regional Historic and Projected Population, Employment and Housing Rates**

	Historic			Projected		
	1990	2000	2010	2020	2030	2040
Vacancy Rate		3.4	6.4	4.0	4.0	4.0
Persons per Household*	2.61	2.69	2.69	2.69	2.71	2.75
Labor Force Participation Rate	55.6	52.6	51.6	52.6	50.8	49.9
Unemployment	5.1	4.5	10.6	5.1	5.1	5.1
Employed Residents per Job	0.983	0.900	0.966	0.966	0.966	0.966

\*Population per household is based on the household population of 9,089,000

Sources: US Census (1990-2010), ABAG (2020-2040)

## Data Sources and Uses

Chapple, Karen and Jacob Wegmann, *Evaluating the Effects of Projected Job Growth on Housing Demand*.

[http://www.onebayarea.org/pdf/KC\\_Effects\\_of\\_Projected\\_Job\\_Growth\\_on\\_Housing.pdf](http://www.onebayarea.org/pdf/KC_Effects_of_Projected_Job_Growth_on_Housing.pdf)

- Analysis of constraints on housing production in the region.

Levy, Stephen, *Bay Area Job Growth to 2040: Projections and Analysis*, Center for Continuing Study of the California Economy, February 2012.

[http://www.onebayarea.org/pdf/3-9-12/CCSCE\\_Bay\\_Area\\_Job\\_Growth\\_to\\_2040.pdf](http://www.onebayarea.org/pdf/3-9-12/CCSCE_Bay_Area_Job_Growth_to_2040.pdf)

- Source of unconstrained (upper limit) regional employment growth.
- Source of industry sector composition of employment for the region and the nation.

Pitkin, John and Dowell Myers. *Projections of the U.S. Population, 2010-2040, by immigrant Generation and Foreign-Born Duration in the U.S.*, Population Dynamics Research Group, University of Southern California School of Policy, Planning, and Development, October 2011.

[http://www.usc.edu/schools/price/futures/pdf/2011\\_Pitkin-Myers\\_Projections-Immigrant-Generations-and-Foreign-Born.pdf](http://www.usc.edu/schools/price/futures/pdf/2011_Pitkin-Myers_Projections-Immigrant-Generations-and-Foreign-Born.pdf)

- Source of lower national population projection incorporating declines in immigration reflected in 2010 Census.
- Used for national employment forecast prepared by Stephen Levy.

United States Census Bureau, 2010 Decennial Census. *2010 Census Summary File 1, Table PCT12 by Race/Ethnicity*, California and Counties. Extracted on July 22, 2010 and published by California State Data Center. Downloaded January 20, 2012.

[http://www.dof.ca.gov/research/demographic/state\\_census\\_data\\_center/census\\_2010/view.php#SF1](http://www.dof.ca.gov/research/demographic/state_census_data_center/census_2010/view.php#SF1)

- Source of 2010 base year population by age, gender, and race/ethnicity
- Used for base year population profile.

United States Census Bureau, 2010 Decennial Census, 2010 Census Summary File 1, Table PC01 Group Quarters Population Sex by Age, Table P12 Total Population Sex by Age, Table P42 Group Quarters Population by Group Quarters Type. American FactFinder. Downloaded January 11 and January 19, 2012. [Copy of Table P42 downloaded June 13, 2012 for complete record]

<http://factfinder2.census.gov/faces/nav/jsf/pages/index.xhtml>

- Source for group quarters population share of total population by age and breakout of group quarter population by group quarters type.
- Used for future group quarter and non-institutionalized population calculations.

State of California, Department of Finance, *Population Projections for California and Its Counties 2000-2050, by Age, Gender and Race/Ethnicity*, Sacramento, California, July 2007.

<http://www.dof.ca.gov/research/demographic/reports/view.php>

(newer projection released January 2013)

- Population growth rates by age, gender, and race/ethnicity. Incorporates natural increase (births minus deaths) and net migration.
- Used for the age and race/ethnic profile of population growth in the regional projection. This feeds into calculations of future year labor force participation rates, persons per household, and group quarters and non-institutionalized population.
- This is not the direct source of future year projected total population.

United States Department of Labor, Bureau of Labor Statistics, *Labor force participation rates, 2008-2018* and *Labor force participation rates, to 2050*. Labor Force (Demographic) Data. Downloaded January 4, 2012.

[http://www.bls.gov/emp/ep\\_data\\_labor\\_force.htm](http://www.bls.gov/emp/ep_data_labor_force.htm)

(newer short-term participation rates released, longer-term rates removed from website)

- Source of national future labor force participation rates by age and race/ethnic group.
- Used for future regional labor force participation rate calculation.

United States Census Bureau, 2009 American Community Survey 5-Year Estimates. Table S2301 Employment Status. American Factfinder. Downloaded January 24, 2012. <http://factfinder2.census.gov/faces/nav/jsf/pages/index.xhtml>

- Source for current labor force participation rate for the region.
- Used to adjust national labor force participation rate to the regional rate.

Wyatt, Ian D. and Kathryn J. Byun. *The U.S. economy to 2018: from recession to recovery*. Monthly Labor Review, November 2009.

<http://www.bls.gov/opub/mlr/2009/11/art2full.pdf>

- Source for 5.1% future year full-employment assumption.

## Description of Variables Used in Forecast

### **Jobs**

Total potential jobs in the Bay Area are provided by Center for Continuing Study of the California Economy, based on an analysis of the Bay Area's share of national jobs by job sector and the region's competitiveness in these sectors. The forecast jobs are calculated from employed residents, holding the 2010 employed resident per job ratio of 0.966 constant. This assumption holds the rates of net in-commuting and multiple job holding constant into the future, as opposed to the increases experienced in the 80's and 90's.

### **Population Profile**

The age and ethnic composition of the region's future growth comes from: Population Projections for California and Its Counties 2000-2050 (Department of Finance 2007). For each decade, the growth shares by age and ethnic composition were added to the 2010 base population profile from the 2010 Decennial Census to get future year age and ethnic total population profiles. The net migration assumption for the Department of Finance forecast averages 177,000 statewide over the 50-year period, or approximately 35% of the growth. This is the source for the composition of population growth, not the level of total growth.

### **Population**

Total population is adjusted so that the calculated total housing units matches the 22,000 units per year growth assumption.

### **Group Quarters Population**

The future group quarters population is calculated as a share of total population. The share is calculated using Census 2010 rates of group quarter population by age applied to the future year population profile.

### **Non-Institutionalized Population**

Similar to the group quarters population, non-institutionalized population is calculated as a share of total population. The share is calculated using Census 2010 rates of non-institutionalized population by age applied to the future year population profile.

*Note:* Census 2010 data obtained included group quarters population broken out by age group, and group quarters population by group quarters type, which allows for separating institutionalized and non-institutionalized total populations (but was not broken out by age group). Assumptions were made on the age break-out of different group quarters types – in particular college and nursing group quarters populations, to better estimate the age break-down of non-institutionalized population for the purposes of calculating the labor force.

### **Household Population**

Total household population is calculated by subtracting group quarters population from total population.

### **Persons per Household**

Existing headship rates – the ratio of household population to heads of households – by age and ethnic group are derived from the 2009 American Community Survey 5-year average estimate. The existing headship rates by age and ethnic group are applied to the future year household population profile to get the future persons per household for the Bay Area. Changes in headship rates are not assumed – the change in the overall persons per household over time is solely a result of the changing population profile of the region.

### **Households**

Total households are calculated by dividing the future household population by the future persons per household.

### **Vacant Units**

Vacant units are calculated by an assumed future vacancy rate of 4% of total housing units in future years, due to regular turnover of the housing stock.

### **Housing Units**

A thirty-year average housing production level of 22,000 is assumed. This is based upon an analysis of past production, challenges associated with increasing the inventory of multi-family housing brought to market, and future policy supports, acknowledging that high housing costs and limited production is a factor constraining the ability of the region to accommodate future job growth. Total housing units is calculated by dividing total households by 0.96 (one minus the vacancy rate).



### **Labor Force Participation Rates**

Future national labor force participation rates were obtained from Labor force participation rates, 2008-2018 and Labor force participation rates, to 2050 (Bureau of Labor Statistics). The future national labor force participation rates by age and ethnic group are applied to the future non-institutionalized population profile. The overall rate is then adjusted for the region based upon the difference in 2010 between national and regional labor force participation to get the future labor force participation rate for the Bay Area.

### **Labor Force**

Labor force is calculated by multiplying the future year non-institutionalized population by the future labor force participation rate.

### **Unemployment Rate**

The assumption is for full employment levels in future years. This is assumed as a 5.1% unemployment rate per the Bureau of Labor Statistics (Wyatt 2009).

### **Employed Residents**

Employed residents are calculated by subtracting the unemployed residents from the labor force. Unemployed residents are calculated by multiplying the labor force by the unemployment rate.

### **Employed Residents per Job**

This ratio is influenced by levels of in-commuting and out-commuting as well as the number of employed residents holding multiple jobs. We have assumed that this ratio holds at the 2010 level, implying the rates of net in-commuting and multiple job-holding remain constant. This implies a small increase in in-commuting and multiple job-holding from 2010 proportionate to the increase in total jobs in the region, but halts the trend of increasing rates of in-commuting into the region seen in recent decades, due to road capacity constraints and additional housing production supports within the region. This also keeps the in-commute well below 2000 levels.

## Summary of Key Assumptions

### **Pace of recovery**

- Over the next five years, employment will remain below its pre-recession peak.
- Housing production will likely remain suppressed over the next five years. Recovering production from these very low levels is likely to be gradual, with at least two years of foreclosures to work out.
- Demand for certain types of housing, such as multi-family, and in certain strong markets has remained, though the lack of financing in the near term is slowing development.

### **Employment**

- Lower recent national growth forecasts and decreased immigration levels reflected in the Census are incorporated into baseline forecast of national growth.
- Bay Area growth has trended toward national growth over the last couple of decades.
- Housing supply does constrain job growth; the region will lose jobs if constraints on housing supply are not sufficiently lifted.

### **Housing assumptions**

- The regional rate of employed residents to households is not likely to change much, unless similar constraints on housing production outside of the region would limit spillover supply.
- While assuming no new in-commuting is unrealistic, transportation and infrastructure capacity constraints and the housing market collapse in outlying areas, along with demographic shifts and changing preferences, will reduce continued growth in rates of in-commuting. As a result, maintaining the current jobs per employed resident ratio is a reasonable assumption.
- Demographic and market trends will also influence the type and location of future housing production. Over the next fifteen years, there is projected to be a large increase in the young adult population, as well as retired workers and the elderly. Stable home values and high demand for rental in many inner-bay communities may spur higher rates of sales, downsizing, and higher-density construction. At the same time, outlying areas hit hard by foreclosures and lower home values will likely see higher rates of retirees holding onto larger homes and little new construction for some time. In the later years, from 2025-2040, there will be a resurgence of growth in the family-forming 30-45 year-old cohort, which may lift the housing market in outlying areas.

## Summary of Key Assumptions *(continued)*

### **Demographic trends**

- The aging of the population will slow after about 2025. From 2025-2040, there is expected to be a resurgence of growth with the family-forming cohort (30-45 years old). These shifts suggest that:
  - Most of the housing need will be driven by seniors and young adults early on, and by family populations in the later years
  - This means more demand for multi-family housing in the near term, as well as some increased demand for single-family housing in the later years.
  - The current 55-70 year old cohort may choose to age in place for some time, but by the time they reach their 80's many will likely no longer want to live alone. This will free up some single-family housing for new families and create demand for multi-family housing/assisted living in the later years

### **Industry sector mix**

- High-skill, high-tech service and manufacturing sector companies will continue to be the drivers of job growth in the Bay Area.
- This growth will continue to drive growth in other business-support and service sectors. The broader industry sector mix of the Bay Area will not be dramatically different from other metropolitan areas.

### **Future household income levels**

- It is expected that much of the driving industries job growth will occur in the higher-paying high-tech sectors. Higher-income residents will require services (retail, nursing and child care, education, fire and police, etc.), and they will prefer better services, so lower- and middle-income jobs will be retained and created.
- Job replacement will become an important factor as baby boomers retire over the next couple of decades. These jobs are at all income levels and in all industry sectors, not just higher-paying technical jobs, so it could be assumed that moderate-income jobs will be retained in the Bay Area. Matching the labor force to these replacement jobs will be a challenge, both locally and nationally.

## SNAPSHOT OF THE BAY AREA, 2010-2040

By 2040 the San Francisco Bay Area is projected to add 2.1 million people, increasing total regional population from 7.2 million to 9.3 million, an increase of 30 percent or roughly 1 percent per year. This growth means the Bay Area will continue to be California's second-largest population and economic center. Two major demographic changes shape the forecast of household and job growth: the increase in the senior population and the increase in the Latino and Asian populations. The number of jobs is expected to grow by 1.1 million between 2010 and 2040, an increase of 33 percent. During this same time period the number of households is expected to increase by 27 percent to 700,000, and the number of housing units is expected to increase by 24 percent to 660,000. While roust, this projected rate of growth is actually slower than other metropolitan regions in California and also is slower than the Bay Area's pace of growth in the 1970s and 1980s. (See Table 3.)

**Table 3. Bay Area Population, Employment and Housing Projections, 2010 - 2040**

	2010	2040	Growth 2010 - 2040	Percent Change 2010 - 2040
Population	7,151,000	9,299,000	2,148,000	+30%
Jobs	3,385,000	4,505,000	1,120,000	+33%
Households	2,608,000	3,308,000	700,000	+27%
Housing Units	2,786,000	3,446,000	660,000	+24%

*Sources: 2010 US Census, ABAG*

### Population Forecast

The population forecast was derived from ABAG's job growth forecast<sup>2</sup>. (See Employment Forecast, p.16.) It also analyzed the existing population and its labor force participation rates by age cohort and race. Beyond births and deaths, it was assumed that the rate of in-migration to the region will remain the same from 2010 to 2040.

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<sup>2</sup> Job growth is the main determinant of population growth in all major regional forecast modeling in California and around the nation. Population growth is tied to job growth in the regional projections produced by the Southern California Association of Governments (SCAG), the San Diego Association of Governments (SANDAG), the Sacramento Association of Governments (SACOG), the Monterey Bay Area Association of Governments (AMBAG) and the Santa Barbara County Association of Governments (SBCAG). In addition job growth is the primary determinant of regional population growth in the three major national forecasting firms--IHS Global Insight, Regional Economic Models, Inc. (REMI) and Economy.com, a division of Moody's.

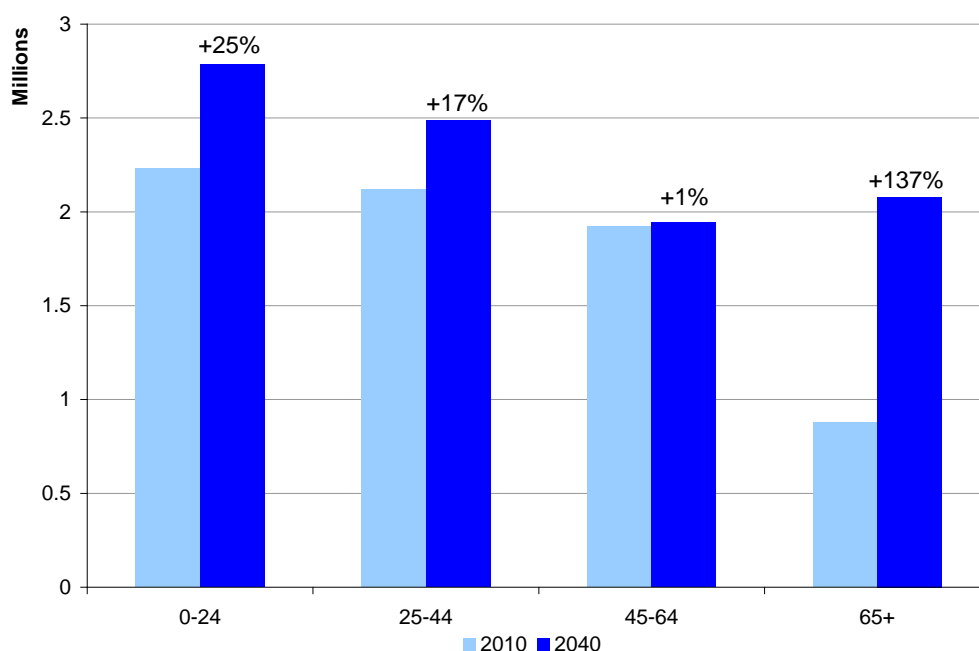


Incentives to produce housing close to job centers will result in some increases in the number of households and total population<sup>3</sup>.

### Aging Baby Boomers

Between 2010 and 2040 the Bay Area's population is expected to grow significantly older. Today, people who are 65 and over represent 12 percent of the total population, but by 2040 the share will increase to 22 percent. Put another way, the number of seniors will more than double from under 900,000 today to nearly 2.1 million by 2040. (See Figure 2.) By contrast, the segment of population aged 45-64 will grow by less than 1 percent, and will shrink from 27 percent of the total population today to 21 percent by 2040. The projected increase in the senior population will cause the overall labor force participation rate to fall, even as more people work beyond the age of 65. By 2040, 50 people out of every 100 in the Bay Area are projected to be in the labor force, compared to 52 people out of 100 in 2010.

**Figure 2. Bay Area Population by Age, 2010 and 2040**



Sources: 2010 US Census, ABAG

<sup>3</sup> In January 2013, the California Department of Finance (DOF) issued its 50-year Projections of Population and Births. The ABAG population projection is significantly higher than the 8.5 million forecast for the region by the DOF. Regional population is projected to increase by 2.1 million between 2010 and 2040 in the ABAG projections, whereas DOF is projecting a 1.3 million population increase. These differences in projected population are accounted for primarily by 3 factors: 1) The DOF forecast starts with population growth, whereas the ABAG forecast is driven by job growth; 2) DOF uses the 2000-2010 historical migration trends as the basis for future trends. Thus, the two major recessions during this period results in uncharacteristically low migration rates; and 3) DOF did not take into account job growth in the Bay Area as reported by ABAG.

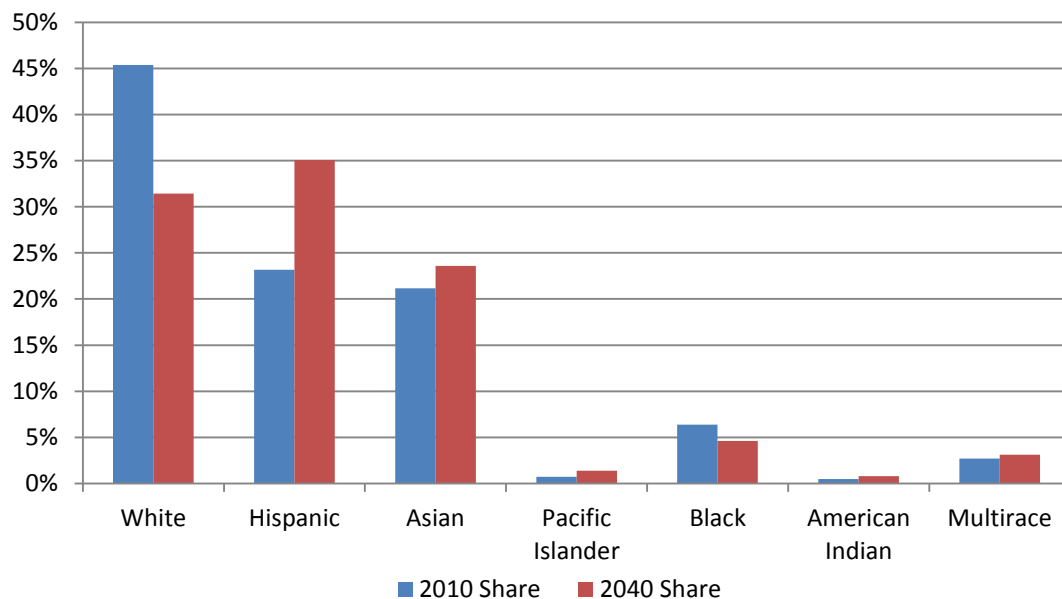
Younger-age segments of the population will increase in size substantially, but will represent a slightly smaller share of total population in the future due to the large number of aging baby boomers. The number of people aged 25-44 will increase by 17 percent or nearly 370,000, while the number of people aged 24 and younger will increase by 25 percent or over 550,000.

### Increased Racial and Ethnic Diversity

By 2040 the population will become substantially more racially and ethnically diverse (Figure 3). Latinos will emerge as the largest ethnic group, increasing from 23 percent to 35 percent of the total population. The number of Asians also will increase, growing from 21 percent to about 24 percent of the population. The population growth of these ethnic groups is significant for Plan Bay Area because of their historic preference for multifamily housing. According to the California Department of Finance, the Latino and Asian populations also form multigenerational households at a higher rate than the general population. (See Housing Forecast, p.19.)

In contrast, the share of non-Hispanic whites will drop sharply from approximately 45 percent of today's population to about 31 percent in 2040. The African-American segment of the population also is expected to decline slightly, dropping from 6 percent to 5 percent, while other demographic groups are expected to maintain a similar share of the population in the future as they do today.

**Figure 3. Bay Area Population by Ethnicity, 2010 and 2040**



Sources: 2010 US Census, ABAG

## Employment Forecast

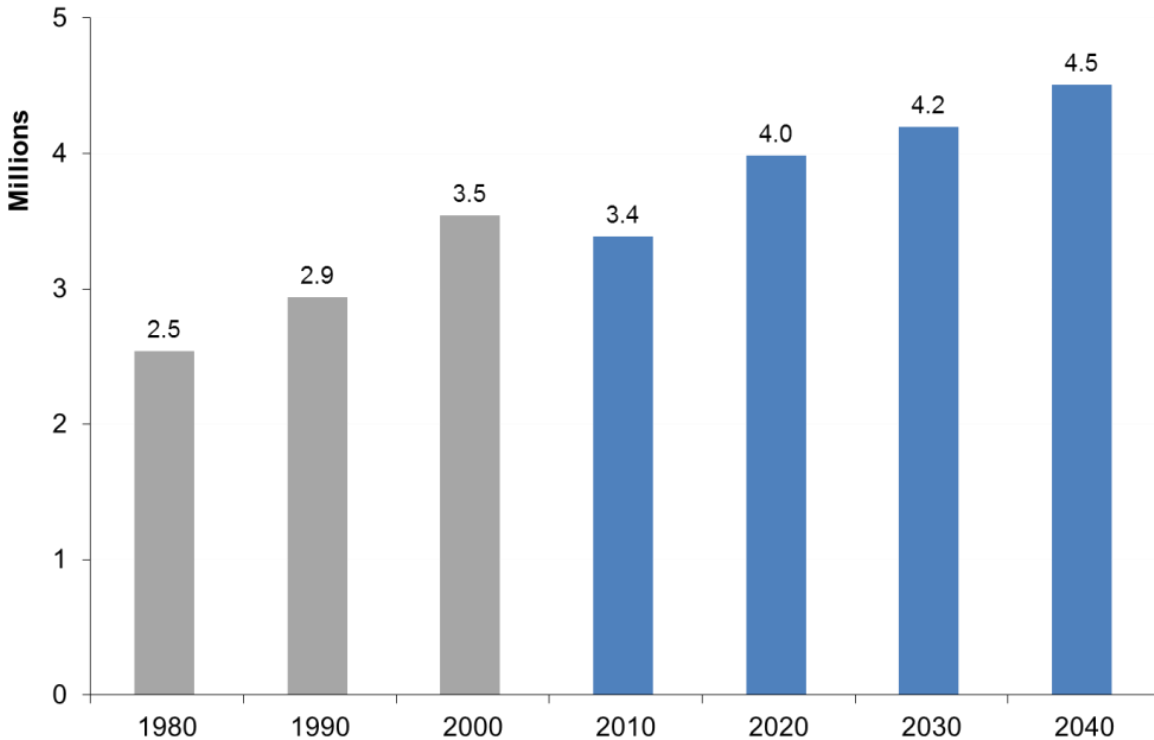
The Association of Bay Area Governments forecasted regional employment by industry sector utilizing an analysis of the Bay Area's competitiveness by industry in relation to the state and national growth forecast conducted by CCSCE. The analysis took into account the Bay Area's concentration of knowledge-based industries, research centers and universities; the presence of a highly educated and international labor force; expanding international networks serving the global economy; and the overall diversity of the regional economy.

These fundamental assets underpinning the Bay Area economy still are strong. While it is true that the region has not recovered all jobs lost since the "dot-com bubble" popped in 2000, the so-called "jobless growth" of the last decade was a national phenomenon not limited to the Bay Area. Furthermore, increasing numbers of news articles report that various parts of the regional economy are on the mend. For example, the Bay Area led California job growth in 2012 with 91,400 new jobs, a nearly 3 percent increase from 2011 and more than twice the nationwide average, according to Bloomberg News ("Google, Facebook lead Bay Area jobs," Jan. 27, 2013). Based on the above factors and strong fundamentals, Bay Area employment is forecast to grow at a slightly faster rate than that of the nation as a whole.

Substantial numbers of jobs are expected to be created between 2010 and 2040 (Figure 4). More than half of the projected 1.1 million new jobs are expected to be created between 2010 and 2020, which includes the recovery of close to 300,000 jobs lost during the Great Recession that began in 2007. The gain of 1.1 million jobs does not translate directly into new office, commercial or industrial construction. About one-third of these jobs could potentially be accommodated within existing offices and facilities, given current vacancy rates. Many of these jobs are expected to be filled by currently unemployed or underemployed individuals. From 2020 to 2040, the rate of job growth is forecast to slow in comparison to the 2010-2010 period.

The job growth forecast was adjusted based on the difficulties in supplying sufficient housing in the Bay Area to meet the needs of workforce housing within reasonable commute times. The historic imbalances in the Bay Area housing market have resulted in excessively high housing prices in locations close to job centers. Employers have consistently cited these imbalances as the most difficult aspect of recruiting and retaining high-quality employees in the region.

**Figure 4. Total Regional Employment, 1980-2040**



*Sources: US Census (1960-1980), DOF (1990-2000), ABAG*

### **Employment Growth Highest in Professional Services, Health and Education, and Leisure and Hospitality Economic Sectors**

Major industry job trends in the Bay Area over the next 30 years are expected to largely mirror national trends. Nearly 73 percent of total employment growth is projected to be in the professional services, health and education, and leisure and hospitality sectors. The national trends of slower growth in retail and finance are also expected in the Bay Area. Construction jobs are expected to almost regain pre-recession levels by 2020 and to increase slightly by 2040. Although this is a substantial gain compared to 2010, it is driven primarily by a slow return to more normal construction levels in the region. Manufacturing jobs are projected to remain more or less stable through 2040. (See Table 4.)

Industry sectors contain a wide spectrum of wages, which correspond to the skill levels and training needed for different occupations. This is especially true for the two sectors with the highest projected growth: professional services and health and education. For example, fewer than half the jobs in professional services require the higher levels of education and specialization than one might consider typical for this sector. The construction, manufacturing and wholesale sectors have significant numbers of jobs in



middle-income occupations, while the leisure and hospitality (which includes hotels) and retail sectors have higher shares of low-income jobs. While there are substantial opportunities in fast-growing sectors with large numbers of high income jobs, these sectors also will create middle- and low-income jobs. For example, the professional services sector will create both high-income jobs, such as a vice president of sales, and lower-income jobs, such as a file clerk.

**Table 4. Bay Area Employment by Sector, 2010 – 2040, Ranked by Job Growth**

<b>Sector</b>	<b>2010</b>	<b>2040</b>	<b>Growth (Loss) 2010-2040</b>	<b>% Change 2010 - 2040</b>
Professional Services	596,700	973,600	376,900	+63%
Health and Education	447,700	698,600	250,900	+56%
Leisure and Hospitality	472,900	660,600	187,600	+40%
Construction	142,300	225,300	82,900	+58%
Government	499,000	565,400	66,400	+13%
Retail	335,900	384,400	48,500	+14%
Finance	186,100	233,800	47,700	+26%
Information	121,100	157,300	36,300	+30%
Transportation and Utilities	98,700	127,400	28,600	+29%
Manufacturing and Wholesale	460,200	456,100	(4,100)	-1%
Agriculture and Natural Resources	24,600	22,700	(1,900)	-8%
<b>All Jobs</b>	<b>3,385,300</b>	<b>4,505,200</b>	<b>1,119,900</b>	<b>+33%</b>

*Sources: CCSE, ABAG*

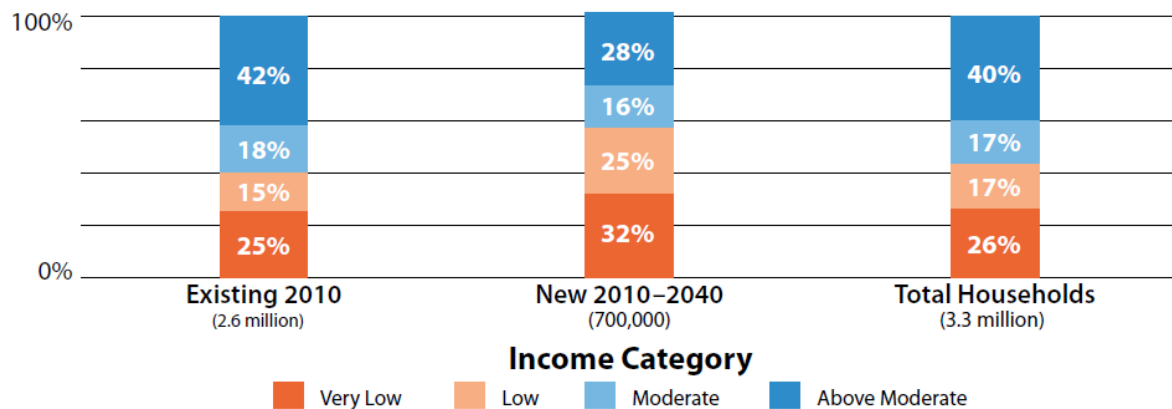
### **Growth in Lower-Income Households**

The household income forecast was based on projected jobs by sector, associated occupations and wages, and trends in the geographic distribution of households by income level over the past several decades. Wages were calculated based on the occupations within each industry group. Other income, such as capital gains from stock market investments, was estimated from state and national forecasts as well as from past regional trends. The geographic distribution of households by income was estimated from the U.S. Census.

Today, about 40 percent of the existing 2.6 million households in the Bay Area (or just over 1 million) fall into the very-low and low-income groups, according to U.S. Census figures. Due to the growth in leisure and hospitality, retail and other low-income jobs,

the number of people in very-low and low-income groups is projected to increase from 40 percent of households to 43 percent of households by 2040, while those in the moderate and above-moderate categories will decrease from 60 percent to 57 percent of households (Figure 5). This is a worrisome trend in a region with such a high cost of housing, food and other necessities.

**Figure 5. Bay Area Households by Income Category, 2010-2040**



Source: U.S. Census; Karen Chapple and Jacob Wegmann, Evaluating the Effects of Projected Job Growth on Housing Demand, 2012

## Housing Forecast

The Association of Bay Area Governments based its housing production forecast on expected household income and demand, past housing production trends, and local plans (including planned zoning changes). It also assumed the following:

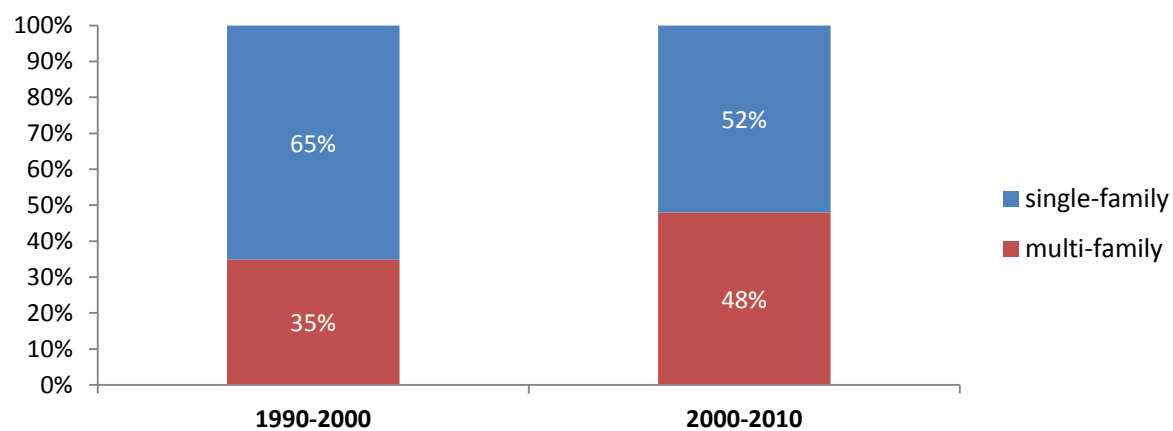
- Existing policies and programs to produce housing will be retained and enhanced.
- A replacement mechanism will be found to fund and implement many of the functions that were performed by California redevelopment agencies before Gov. Jerry Brown signed legislation abolishing those agencies in June 2011.
- Some aging baby boomers will move to residential care facilities or other group housing.
- An estimated 40,000 vacant or foreclosed homes will be reabsorbed into the region's housing supply.

## Demand for Multi-Unit Housing in Urban Areas Close to Transit Expected to Increase

The Bay Area has produced an average of just over 23,000 housing units annually since the 1980s. Single-family homes represent the majority of housing production in recent

decades. Most of these homes were built on undeveloped land in suburban locations that provided housing for the post-war baby boom generation and their families. However, according to the Urban Land Institute's *What's Next? Real Estate in the New Economy* (2011), recent trends suggest that cities once again are becoming centers of population growth, including in the Bay Area. On average, construction of multifamily housing in urban locations in the Bay Area increased from 35 percent of total housing construction in the 1990s to nearly 50 percent in the 2000s, and in 2010 it represented 65 percent of all housing construction (Figure 6).

**Figure 6. Bay Area Housing Construction by Type, 1990-2010**



Source: US Census

Based upon the emerging demographic changes and employment growth forecasts previously discussed, an annual average of approximately 22,000 units (95 percent of the annual average since the 1980s) or 660,000 new homes are forecast to be constructed by 2040. This projection of new homes is marginally higher than the 600,000 new homes estimated by UC Berkeley, whose estimate was based on historical housing production trends. The regional forecast assumes that strong housing policies will push housing demand and housing production levels up in the region in comparison to past trends. Demand for multifamily housing is projected to increase as seniors downsize and seek the greater access to shops and services that urban locations provide. Latino and Asian household growth, along with population growth of those aged 34 and under, also will increase demand for multifamily housing in urban locations. Market demand for new homes will tilt toward townhomes, condominiums and apartments in developed areas. These homes are typically closer to transit, shops and services than the single-family residential development pattern of earlier decades.

Market demand for housing near transit also is expected to increase. According to the University of Southern California Population Dynamics Research Group's *The 2010 Census Benchmark for California's Growing and Changing Population* (2011), people aged 55 and over are more likely to prioritize public transportation, walking, access to shops and services, and multifamily housing than do other households. Young singles prefer similar locations with urban amenities, and they prioritize short commutes. These demographic changes represent substantial shifts that are expected to contribute to the Bay Area's recovery from the Great Recession. For example, the regional real estate market already is showing signs of recovery. (See Bay Area Housing Market Appreciation sidebar on p. 10 for more detail.)

The current single-family housing stock provides a large supply relative to future demand, and an oversupply is projected by 2040. This oversupply is expected to dampen production of multifamily housing, as some households opt instead for single-family homes that are made more affordable due to the excess supply. Despite lower demand for newly constructed single-family homes, some production will occur as the Bay Area housing market gradually adjusts to these changing demographics.

## Looking Ahead

The population, employment and housing forecasts provide information to help determine how the region will house its new residents and workforce looking forward to 2040. The forecasts summarized here were used to develop the land use distribution discussed in the next section. The forecasts and future land use distribution also will affect Bay Area travel patterns, and have informed the transportation investment strategy for Plan Bay Area. It should be noted that Plan Bay Area and its related forecasts will be updated every four years.

### 3. DISTRIBUTION OF FORECASTED JOBS AND HOUSING

ABAG and MTC developed a variety of land use and transportation scenarios that distributed the total amount of growth forecasted for the region to specific locations. These scenarios sought to address the needs and aspirations of each Bay Area jurisdiction, as identified in locally adopted general plans and zoning ordinances, while meeting Plan Bay Area performance targets adopted by the agencies to guide and gauge the region's future growth. The framework for developing these scenarios consisted of the pre-existing Priority Development Areas (PDAs) and Priority Conservation Areas (PCAs) chosen by local governments. ABAG and MTC created the scenarios through a transparent, deliberative process, during which public input was sought at every step along the way. After further modeling, analysis and public engagement, the five initial scenarios were narrowed down to a single preferred land use scenario. This scenario and resulting development pattern represent the Sustainable Communities Strategy (SCS) that Plan Bay Area must include in the Regional Transportation Plan, as mandated by Senate Bill 375. The preferred land use scenario is a flexible blueprint for accommodating growth over the long term.

#### LAND USE OBJECTIVES

As required by SB 375, the land use distribution in Plan Bay Area identifies the locations that can accommodate future growth, including the scale and type of growth most appropriate for different types of locations. In order to meet the Bay Area's greenhouse gas (GHG) emissions reduction and housing targets, and to make progress toward meeting the other adopted performance targets, the plan encourages future job and population growth in existing communities with access to existing or planned transportation investments. The land use pattern seeks to achieve four comprehensive objectives:

- 1. Create a network of complete communities** – Building on the PDA framework of complete communities that increase housing and transportation choices, the plan envisions neighborhoods where transit, jobs, schools, services and recreation are conveniently located near people's homes.
- 2. Increase the accessibility, affordability and diversity of housing** – The distribution of housing in the Bay Area is critical, given its importance to individuals, communities and the region as a whole. The Bay Area needs sufficient housing options to attract the businesses and talented workforce needed for a robust future economy.
- 3. Create jobs to maintain and expand a prosperous and equitable regional economy** – The plan seeks to reinforce the Bay Area's role as one of the most

dynamic regional economies in the United States. It focuses on expanding the existing concentration of knowledge-based and technology industries in the region, which is a key to the Bay Area's economic competitiveness.

- 4. Protect the region's unique natural environment** – The Bay Area's greenbelt of agricultural, natural resource and open space lands is a treasured asset that contributes to residents' quality of life and supports regional economic development.

## LAND USE DISTRIBUTION APPROACH

There are two main inputs for the Plan Bay Area land use distribution process. The first input is California Senate Bill SB 375, under which the Bay Area is required to identify a land use pattern that will:

- 1. Help the region achieve its GHG emissions reduction target** of reducing per-capita CO<sub>2</sub> emissions from cars and light-duty trucks by 7 percent by 2020 and by 15 percent by 2035; and
- 2. House 100 percent of the region's projected 25-year population growth** by income level (very-low, low, moderate, above-moderate) without displacing current low-income residents.

The second input is the long-term growth forecast developed using historic and future demographic trends, as described above. In addition to these inputs, the land use distribution emphasizes growth in locally identified Priority Development Areas (PDAs) along the region's core transit network and accommodates 100 percent of new growth within existing urban growth boundaries and urban limit lines. It also emphasizes protection for the region's agricultural, scenic and natural resources areas, including Priority Conservation Areas.

The 169 adopted PDAs are existing neighborhoods nominated by local jurisdictions as appropriate places to concentrate future growth that will support the day-to-day needs of residents and workers in a pedestrian-friendly environment served by transit. Emphasizing higher levels of growth in these locations means that many neighborhoods, particularly established single-family home neighborhoods, will see minimal future change. A key part of the PDA strategy is to move away from an unplanned "project-by-project" approach to growth, toward the creation of complete communities that meet the needs of existing and new residents and workers.

Priority Conservation Areas (PCAs) comprise over 100 regionally significant open spaces for which there exists broad consensus for long-term protection, but which face



nearer-term development pressures. They are a mechanism for implementing Plan Bay Area—particularly in the North Bay, where they are central to the character and economy of many communities, and they ensure that Plan Bay Area considers farmland and resource areas in keeping with Senate Bill 375. The PCAs and PDAs complement one another: promoting compact development within PDAs takes development pressure off the region’s open space and agricultural lands.

## **JOB GROWTH**

### **Employment Distribution Approach**

#### **Responding to Business Location Trends**

Plan Bay Area’s distribution of jobs throughout the region is informed by changing trends in the locational preferences of the wide range of industry sectors and business place types in the Bay Area. These trends capture ongoing geographic changes, as well as changes in the labor force composition and workers’ preferences. Overall, the changing needs of businesses suggest a transition toward a more focused employment growth pattern for the Bay Area. This focused growth takes a variety of forms across the various employment centers throughout the region, summarized below.

- **Knowledge-based, culture and entertainment at regional centers**

The growth of the professional services sector is expected to result in more jobs in Downtown San Francisco, Downtown Oakland, and Downtown San Jose—assuming an appropriate provision of infrastructure, transit and access to affordable housing. These downtown areas also have attracted international business and leisure travelers, as well as artists and entertainers, fueling the rise of leisure and cultural activities. Similar to the growth of San Francisco’s financial district in the 1970s, the Bay Area is attracting new businesses and workers seeking to locate near related firms, services and amenities. These businesses and professionals seek flexible building spaces and require less office space per worker compared to traditional office space expansion in downtown areas.

- **Multiple activities and transit at office parks**

Office parks are expected to continue to accommodate a growing number of employees. However, given the limited land available for new office parks, available vacant office space, and the preference for walkable, transit-served neighborhoods by growing numbers of employers, office parks are expected to grow at a slower pace than in past decades. Many existing office parks are changing to use less space per worker, provide direct transit access, and even offer housing, services and other amenities. Growing numbers of businesses, particularly in San Mateo and Santa Clara counties, are providing private shuttle

services to help their employees commute to work. Increasing and improving transit access to office parks will lessen, but not fully mitigate, increased traffic congestion related to employment growth.

- **Downtown areas and transit corridors serving residents**

Over the last decade, medium and small cities throughout the region have been expanding the range of services and jobs provided in their downtown areas. The increase in the senior population, combined with the region's changing ethnic profile, is expected to increase the demand for local services, housing and transportation choices across the region, including in many of these medium and small downtown areas. Many of these locations have been identified as PDAs and have shown increased concentrations of knowledge-based jobs in the arts, recreation, and health and education sectors.

- **New vitality of industrial and agricultural lands**

Manufacturing and wholesale distribution have experienced declining employment in many of the region's key industrial areas. However, in recent years a different and very diverse mix of businesses has relocated to some of these Bay Area locations<sup>4</sup>. In addition to basic services such as shuttle operations and refuse collection, or traditional uses such as concrete plants, industrial lands are now occupied by food processing, high tech product development, car repair, graphic design and recycling businesses, among others. The building and space needs of these businesses make traditional industrial lands attractive. These new businesses also provide essential support to other sectors of the economy and vital services to nearby residents.

The trends in agricultural lands have paralleled those of industrial lands in the increasing diversity of activities. However, growth on agricultural land is driven mainly by increased services and tourism. The Bay Area's wealth of agricultural land is unparalleled among the nation's largest metropolitan regions, providing fresh produce and other high quality agricultural products and supporting a world-renowned wine industry. Beyond promoting tourism, the abundance of agricultural land and open space contributes to the quality of life for Bay Area residents and is a draw for people considering relocating from outside the region.

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<sup>4</sup> Based on observed recent trends; further research and analysis would be needed to determine a sector breakdown and geographic origins of these businesses.

## Employment Distribution Methodology

The distribution of new employment growth considers job growth by sector and is linked to input from local residents and planning departments. Employment growth is organized under three major groups: knowledge-sector jobs, population-serving jobs and all other jobs.

The number of knowledge-sector jobs – such as jobs in information technology companies, legal or engineering offices, or biotechnology firms – is expected to grow based on the current concentrations of these jobs, the specialized skills and experience required to perform these jobs, and past growth in the sector. Jobs included in the knowledge-sectors are shown in Table 5.

**Table 5. Knowledge-based Job Sectors**

NAICS* Industry Sectors	Employment Sectors
51	Information
52, 53	Financial and Leasing
54-56	Professional and Managerial Services

\* North American Industrial Classification System

The number of population-serving jobs, such as those in retail stores or restaurants, is expected to grow in a manner reflecting the distribution of future household growth. Jobs included in the population-serving sectors are shown in Table 6.

**Table 6. Population-Serving Job Sectors**

NAICS* Industry Sectors	Sector / Group Name
23	Construction
44-45	Retail Trade
61-62	Educational Services; Health Care & Social Assistance
72	Accommodation and Food Services

\* North American Industrial Classification System

The number of jobs in all other sectors, including the government, agriculture and manufacturing sectors is expected to grow according to the existing distribution of jobs in each of these sectors. Finally, the employment growth distribution also is linked to

access to transit service, which continues to be a major draw for both employers and employees.

## Data Sources and Uses

### **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 August 2011, titled *California County-Level Economic Forecast: 2011-2040*. In comparison, the most recent EDD and BLS projections available date from 2008 and 2009. A complete description of the 2011 Caltrans projection methodology and data out to 2040 is available at: [http://www.dot.ca.gov/hq/tpp/offices/eab/socio\\_economic.html](http://www.dot.ca.gov/hq/tpp/offices/eab/socio_economic.html).

### **Center for Continuing Study of the California Economy (CCSCE)**

CCSCE uses national short-term and long-term economic and demographic forecasts to prepare long-term regional economic projections by industry sector. Details on the CCSCE methodology and analysis are provided in a report, *Bay Area Job Growth to 2040: Projections and Analysis*.

### **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>

## 2010 Employment Distribution

Current employment was based on total jobs by sector as detailed in *Bay Area Job Growth to 2040: Projections and Analysis*, prepared by Stephen Levy at the Center for Continuing Study of the California Economy (CCSCE). This is derived from California Employment Development Department (EDD) wage and salary job estimates plus estimates for self-employed workers developed from the 1990 and 2000 Census and American Community Survey annual estimates. The distribution to the counties is based upon 2010 sector totals by county from the Caltrans forecast. National Establishment

Time-Series (NETS) data is used to distribute jobs by PDA and jurisdiction for each sector within each county.

## 2040 Employment Distribution

### Employment by Economic Sector and County

The first step in the employment distribution was to determine the composition of employment in 2040 by different industry sectors for the region as a whole. This was derived from the Center for Continuing Study of the California Economy's *Bay Area Job Growth to 2040: Projections and Analysis* (February 2012). The next step was to distribute 2040 job numbers among the nine counties for each industry sector based upon county shares of regional employment, as reported in Caltrans' *California County-Level Economic Forecast: 2011-2040* (August 2011).

### Employment by Jurisdiction and Priority Development Area

The distribution of employment by jurisdiction and Priority Development Area was calculated as a share of county growth for each industry sector using five growth distribution factors. The first three distribution factors are based upon the type of job. The fourth and fifth distribution factors are local planning assumptions and the locations of resource areas and farmlands, respectively:

- 1. Population-serving jobs ratio:** For jobs that provide services to households, employment location is dependent upon where people live. As a result, growth of these jobs was distributed based upon the geographic distribution of household growth in the region. The ratio of jobs included in the population-serving category is as follows: 14% of new Construction jobs, 48% of new Retail jobs, 60% of new Health and Education jobs, and 36% of new Leisure and Hospitality sector jobs.
- 2. Knowledge-sector jobs index:** For jobs in the professional and business services, information and finance sectors, a "knowledge strength index" was used to weight the distribution of jobs within each county at the jurisdiction level. The index weights jurisdiction growth based upon multiple factors related to total employment, knowledge-sector employment, knowledge-sector county locations, each jurisdiction's share of total jobs in the county, the jurisdiction's share of knowledge-sector jobs in the county, employment density, and transit service and coverage. The index reflects the tendency of these jobs to be located in areas with already high concentrations of similar companies and a shared labor pool. Table 7 shows the relative weights of each index factor. The maximum deviations for any jurisdiction from existing shares in these sectors based upon the index

weighting was +9 percent and -3 percent of county growth. The index allocation to jurisdictions was adjusted downward for smaller residential communities with limited land capacity to increase employment. PDAs received a 10 percent increase in share of jurisdiction growth in these sectors over existing shares.

**Table 7. Knowledge Strength Index**

Knowledge Strength Index Factor	Variable	Weight
Size of Employment Base	Average total employment 1990-2010	0.1
Size of Knowledge-based sector	Average knowledge employment 1990-2010	0.1
Knowledge-based concentration	Knowledge sectors location quotient 2010	0.2
Job Gravity	Share of county's jobs 2010	0.1
Knowledge-based Growth Capture	Share of knowledge-based job growth in county '90-'00	0.1
Density of Employment	Employees/sq mile	0.15
Transit frequency	Average combined headway 2009 (minutes)	0.2
Transit coverage	% Intersections with Transit	0.05

*Source: ABAG*

3. **Existing employment share for all other jobs:** For the remaining sectors, employment growth was distributed based upon the existing distribution in 2010, using data from the National Establishment Times-Series (NETS) database, which provides employment information by location of business establishments at a high level of geographical resolution.
4. **Local planning assumptions:** This information, including locally-adopted general plans and neighborhood plans, was supplied by local planning departments. Following the distribution of jobs by sector, outlined above, staff reviewed job capacity information for Priority Development Areas provided by local jurisdictions (either directly as feedback on prior scenarios, in PDA application materials and assessment surveys, or in regional land use data collected by ABAG). Where there was additional job growth in a jurisdiction and capacity identified for that growth in Priority Development Areas, the PDA

employment numbers were increased to reflect the local plans. Additionally, shifts among PDAs within a jurisdiction were made to better reflect where growth was planned for by local jurisdictions.

- 5. Resource areas and farmland:** This information, derived from farmland and resource lands, the locations of Priority Conservation Areas, and the urban growth boundaries, was checked against the growth distribution to ensure that employment growth was not impacting resource areas.

## 2040 Employment Distribution Highlights

The combined effect of the growth distribution factors directs job growth toward the region's larger cities and Priority Development Areas with a strong existing employment base and communities with stronger opportunities for knowledge-sector jobs. As a result, almost 40 percent of the jobs added from 2010 to 2040 will be in the region's three largest cities – San Jose, San Francisco and Oakland – which accounted for about one-third of the region's jobs in 2010. Two-thirds of the overall job growth is anticipated to be in PDAs throughout the region. Map 1 on page 33 shows where the region is expected to add jobs during this time period.

Due to the strength of the knowledge sector, nine of the 15 cities expected to experience the greatest job growth are in the western and southern part of the region surrounding Silicon Valley (Table 8). The remaining communities expecting high levels of job growth are in the East Bay and North Bay, relying on their strong roles in the current economy, diverse employment base, and their proximity to a large base of workers.

In sum, the 15 cities expected to experience the most job growth will account for roughly 700,000 jobs, or just over 60 percent of the new jobs added in the region by 2040.



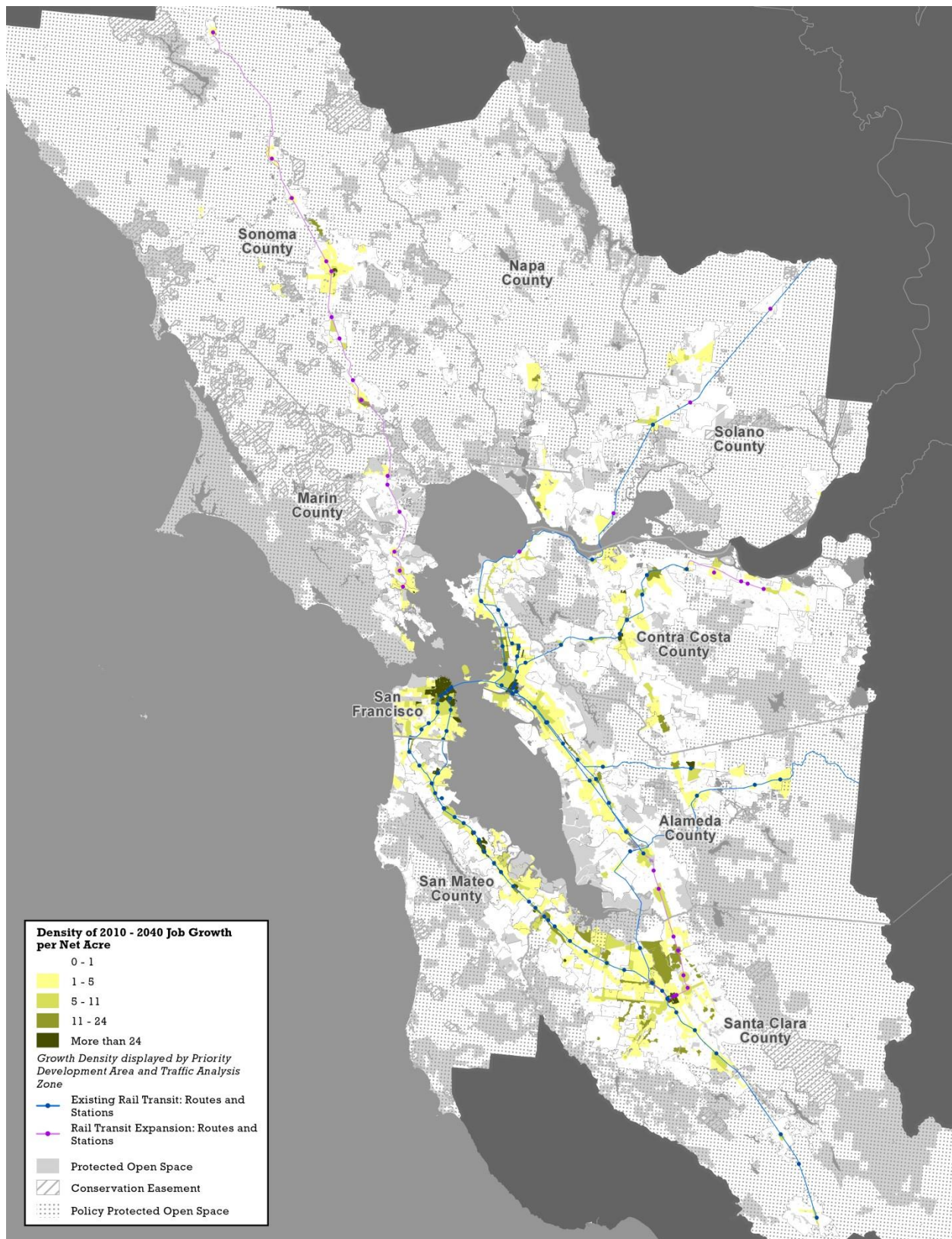
**Table 8. SF Bay Area Total Job Growth 2010-2040, Top 15 Cities**

Rank	Jurisdiction	Total Jobs		2010-2040 Job Growth	
		2010	2040	Total Growth	Percent Growth*
1	San Francisco	569,000	759,000	191,000	34%
2	San Jose	375,000	522,000	147,000	39%
3	Oakland	190,000	275,000	85,000	45%
4	Santa Clara	112,000	146,000	33,000	29%
5	Fremont	90,000	120,000	30,000	33%
6	Palo Alto	89,000	119,000	30,000	33%
7	Santa Rosa	75,000	104,000	28,000	38%
8	Berkeley	77,000	99,000	22,000	29%
9	Concord	48,000	69,000	22,000	46%
10	Hayward	69,000	90,000	21,000	30%
11	Sunnyvale	75,000	95,000	21,000	28%
12	San Mateo	53,000	73,000	21,000	39%
13	Redwood City	58,000	78,000	19,000	33%
14	Walnut Creek	42,000	57,000	16,000	38%
15	Mountain View	48,000	63,000	16,000	33%

*\*Percentage growth figures may appear inaccurate due to rounding.*

*Source: Jobs Housing Connection Strategy, ABAG (2012)*

**Map 1. Density of Job Growth, 2010-2040**



Source: Jobs-Housing Connection Strategy, ABAG (2012)

# HOUSING GROWTH

## Housing Distribution Approach

### Supporting Equitable and Sustainable Development

The Plan Bay Area housing distribution is guided by the policy direction of the ABAG Executive Board, which voted in July 2011 to support equitable and sustainable development by “maximizing the regional transit network and reducing GHG emissions by providing convenient access to employment for people of all incomes.” This was accomplished by distributing total housing growth numbers to: 1) job-rich cities that have PDAs or additional areas that are PDA-like, 2) areas connected to the existing transit infrastructure, and 3) areas that lack sufficient affordable housing to accommodate low-income commuters.

## Housing Distribution Methodology

As with the 2040 employment distribution, the methodology for distributing new housing throughout the Bay Area involves the use of growth distribution factors:

- **Level of transit service:** The highest level of transit service in an area was used to group each area into one of three regional transit tiers. Places with high levels of transit service were assigned more growth, with the goal of utilizing the existing transit infrastructure more efficiently and leveraging the region’s emphasis on operating and maintaining the current transit system.
- **Vehicle miles traveled (VMT) per household:** Housing growth was directed to locations expected to result in the lowest greenhouse gas emissions. This adjustment was based on a measure of the use of Bay Area freeways and roads called “vehicle miles traveled” (VMT). One vehicle (regardless of the number of passengers) traveling one mile constitutes one “vehicle mile.” The number of vehicle miles traveled is highly correlated with greenhouse gas emissions. VMT data was derived from MTC’s Regional Travel Demand Model.
- **Employment by 2040:** To link housing growth more closely to job centers, the initial housing distribution was adjusted by an employment factor for each area, based on the total 2040 employment for each jurisdiction.
- **Low-wage workers in-commuting from outside the Bay Area:** This factor shifts housing growth to places that are importing many low-income workers. “Longitudinal employment and household dynamics” data from the U.S. Census Bureau was used to determine the number of workers commuting to and from a jurisdiction by income category in 2009 and previous years.
- **Housing values:** To recognize places with high-quality services (schools, parks, infrastructure, etc.), the initial housing distribution was adjusted by a housing

value factor, based on a jurisdiction's median home value in 2010. Data from 2010 U.S. Census.

- **Local planning assumptions:** This information, including locally-adopted general plans and neighborhood plans, was supplied by local planning departments.
- **Resource areas and farmland:** This information was derived from farmland and resource lands, the locations of Priority Conservation Areas, and the urban growth boundaries.

## Data Sources

### **2010 Census Summary File 1 (U. S. Census Bureau)**

The U.S. Census counts every resident in the United States. It is mandated by Article I, Section 2 of the Constitution and takes place every 10 years. National and state population totals from the 2010 Decennial Census were released on December 21, 2010. Redistricting data, which include additional state, county and local counts, were released starting in February 2011. Decennial Census population, housing unit, housing vacancy (including seasonal vacancies), and household data for the region were obtained from the 2010 Census Summary File 1:

<http://factfinder2.census.gov/main.html>

### **Longitudinal Employment and Household Dynamics (U. S. Census Bureau)**

The Longitudinal Employment and Household Dynamics (LEHD) program uses statistical and computing techniques to combine federal and state administrative data on employers and employees with core Census Bureau censuses and surveys. The program provides employment statistics on employment, job creation, turnover, and earnings by industry, age and sex at the local, state, county and sub-county. More information on the LEHD data is available at: <http://lehd.did.census.gov/led/>

### **Regional Travel Demand Model (MTC)**

Vehicle miles traveled (VMT) data at the Transportation Analysis Zone (TAZ) level from the Alternative Scenarios were obtained via MTC's Regional Travel Demand Model.

### **National Establishment Times-Series (Walls & Associates / Dun and Bradstreet)**

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. The NETS data is gathered by individual business and includes number of jobs, industry type, and location. 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>

## 2010 Housing Distribution

The 2010 regional housing unit and household distribution was based on block-level data from the U.S Census Bureau's 2010 Decennial Census.

## 2040 Housing Distribution

The initial basis for distributing household growth to each area in the region was a locally-based assessment of housing development potential through 2040. This assessment was based on general plans, specific plans, and zoning ordinances adopted by local governments<sup>5</sup>; feedback provided by jurisdictions<sup>6</sup>; and, for PDAs, the scale of growth associated with the locally-selected Place Type<sup>7</sup>. Housing unit growth was added to an area's 2010 total housing units to determine the area's "Base Housing Unit Growth".

The following step-by-step methodology was then applied to each area's Base Housing Unit Growth:

1. The Base Housing Unit Growth for each area was adjusted based on the factors related to transit and vehicle miles traveled per household:

**Transit:** The highest level of transit service in an area was used to group each area in the region into one of three transit tiers. Places with high levels of transit service were assigned more growth, with the goal of utilizing the existing transit infrastructure more efficiently. The three transit tiers are:

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<sup>5</sup> ABAG collects existing and planned land use data from local jurisdictions. The land use database includes local zoning and general plan designations along with allowable densities and intensities for development. Development potential up to 2040 for each area within the region was determined via analysis of these local zoning and land use designations. The land use database includes information from adopted general plans and zoning ordinances only, so the capacity reflected in the scenarios may reflect lower (or higher) capacity than what jurisdictions are currently planning.

<sup>6</sup> Local feedback on the SCS scenarios through letters, emails, meetings, and the SCS Basecamp forum, the PDA Assessment, and new applications for PDA designation provided detailed information on planned growth in specific PDAs and jurisdictions and constraints to growth.

<sup>7</sup> Local jurisdictions have defined their PDAs as regional centers, city centers, suburban centers or transit town centers, among other Place Types according to existing conditions and local expectations for the character, scale, and density of future growth. The level of growth in each of the region's PDAs reflects its role in achieving regional objectives. See MTC's Station Area Planning Manual for a description of the attributes of each Place Type.  
[http://www.mtc.ca.gov/planning/smart\\_growth/stations/Station\\_Area\\_Planning\\_Manual\\_Nov07.pdf](http://www.mtc.ca.gov/planning/smart_growth/stations/Station_Area_Planning_Manual_Nov07.pdf)

Transit Tier 1: BART, Muni Metro, VTA Light Rail, Caltrain

High-frequency heavy rail and light rail: locations with substantial existing transit investments that generally provide higher-frequency access region-wide, particularly to major job centers.

Transit Tier 2: ACE, Amtrak Capital Corridor, SMART, eBART, Bus Rapid Transit (BRT) corridors

Low-frequency heavy/commuter rail, future heavy rail, BRT/rapid bus corridors: locations with less convenient access to major job centers and future transit investment areas, generally providing access sub-regionally, rather than region-wide.

Transit Tier 3: All other transit (bus, ferry, etc.)

Locations served by locally-serving and lowest frequency transit.

**Vehicle Miles Traveled Per Household<sup>8</sup>:** Housing growth was directed to locations expected to result in the lowest greenhouse gas emissions. This adjustment was based VMT per household for each area, since this measure is highly correlated with greenhouse gas emissions. Each place was assigned to one of the VMT tiers shown in Table 9.

**Table 9. VMT Tiers**

VMT per Household	VMT Tier
0-25 vmt/hh	Tier 1
25-35 vmt/hh	Tier 2
35-45 vmt/hh	Tier 3
45+ vmt/hh	Tier 4

Each place's Transit Tier and VMT Tier were combined to create a Transit-VMT Tier Adjustment Rate, as shown in Table 10.

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<sup>8</sup>This factor is based on VMT by place of residence for all home-based trips. VMT data for each PDA and non-PDA area is available from MTC's Regional Travel Demand Model. The 2040 VMT by Transportation Analysis Zone (TAZ) modeled from the best-performing SCS alternative scenario was used to calculate a 2040 VMT per household measure for each geographic sub-area used in the distribution.

**Table 10. Transit-VMT Tier Adjustment Rates**

Transit Tier	VMT Tier	Growth Adjustment Rate
1	1	1.1
1	2	1.25*
1	3	1.2
1	4	1.15
2	1	1.25
2	2	1.2
2	3	1.15
2	4	1
3	1	1.2
3	2	1
3	3	1
3	4	0.75

*\*Transit-VMT Tier 1-2 growth adjustment rate is higher than that for Tier 1-1 to ensure that housing growth was not over-allocated to areas that are already well-performing (primarily San Francisco and Oakland PDAs), but instead more evenly spread to areas well-served by transit but exhibiting less transit use (as indicated by VMT).*

Table 11 shows how the Transit-VMT Tier Adjustment Rates were applied to the Base Housing Unit Growth in different types of areas throughout the region.

**Table 11. Adjustment to Base Housing Unit Growth Based on Transit and VMT**

Step	Area	Base Housing Unit Growth	Growth Adjustment
1	Any VMT Tier 1 area	PDAs: Local feedback level of growth  Other areas: land use development potential	Maximum of Base Growth or Transit-VMT Tier Rate x Base Growth. <i>No adjustment for PDAs if planned level of growth exceeds the mid-point of the expected amount of housing for the Place Type.</i>
2	All remaining PDAs: VMT Tiers 2, 3, 4	Local feedback level of growth	Maximum of Base Growth or Transit-VMT Tier Rate x Base Growth. <i>No adjustment for PDAs if planned level of growth exceeds the mid-point of the expected amount of housing for the Place</i>



Step	Area	Base Housing Unit Growth	Growth Adjustment
			Type.
3	All remaining non-PDA areas (excluding areas outside of Urban Growth Boundaries/Urban Limit Lines)		Remainder of Regional Control Total <sup>9</sup> x Core Constrained Alternative Scenario Share of Growth x Transit-VMT Tier Rate (less vacant housing units for places with vacancy >10%)

- The next step in the distribution was to apply additional growth factors related to sustainability, equity, and economy:

**Employment:** To link housing growth more closely to job centers, the initial housing distribution was adjusted by an employment factor for each area, based on the total 2040 employment for each jurisdiction.

**Net Low-Income In-Commuting Factor**<sup>10</sup>: This factor shifts housing growth to places that are importing many low-income workers.

**Housing Value Factor:** To shift housing growth to places that offer high-quality services (schools, infrastructure, parks, etc.), the initial housing distribution was adjusted by a housing value factor, based on a jurisdiction's median home value in 2010<sup>11</sup>.

The three factors were weighted as follows:

**Table 12. VMT Tiers**

Factor	Weight
Housing Value	3
Net Low-income In-commuting	2
2040 Employment	1

<sup>9</sup> The Regional Control Total is 660,000, the total number of housing units forecasted to be added to the region between 2010 and 2040.

<sup>10</sup> U.S. Census Bureau LEHD data was used to determine the number of workers commuting to and from a jurisdiction by income category in 2009 and previous years.

<sup>11</sup> Data from 2010 U.S. Census.

Growth in an area was adjusted a maximum of plus or minus 10 percent based on the combined factors.

3. In some cases, the growth distribution challenged certain communities with particularly rich transit options to grow in a more compact form than called for in their general plans in order to meet the region's performance targets. Additional units were distributed to key job centers and locations along the core transit network, including PDAs and non-PDA areas in the following cities: Burlingame, Millbrae, Oakland, Pleasanton, Redwood City, San Francisco, San Jose, San Mateo, San Ramon, Santa Clara, South San Francisco, Sunnyvale, and Walnut Creek.<sup>12</sup>
4. The resulting housing growth allocated to each sub-area was aggregated to provide a total amount of growth for each jurisdiction. This total growth was compared to the jurisdiction's feedback. If the growth assigned to a jurisdiction with BART or Caltrain stations or with a low amount of VMT per household was less than the locally-identified level of growth, the growth allocated to the jurisdiction was increased to meet the local feedback.
5. Vacancy absorption was factored into the housing distribution to account for current vacant housing units.<sup>13</sup> The total number of new units that will have to be built in an area to accommodate growth to 2040 was reduced based on the number of existing vacant units that are available to accommodate new households in an area.
6. Finally, housing growth was adjusted to account for anticipated levels of growth outside PDAs, including that on presently undeveloped land, and to ensure that no county or city's proposed growth substantially deviates from local plans. The jurisdictional level of growth was adjusted up or down based on feedback, ensuring that growth in each place meets at least 5 percent of existing units (for jurisdictions with population greater than 10,000). Growth from areas exceeding 115 percent of their locally-identified level of growth was re-balanced to areas receiving less than 75 percent of their locally-identified level of growth. Only 70 percent of the total units over-allocated were re-distributed to under-allocated

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<sup>12</sup> These areas were generally identified based on 2010 and 2040 level of employment, 2010 jobs-housing ratio, and level of transit service (particularly focused on BART and Caltrain).

<sup>13</sup> Data from 2010 U.S. Census. The analysis also excluded seasonal housing units and seasonal vacancies from the distribution to ensure they were not counted as available for occupancy by households.

jurisdictions. The result is that the level of growth in some jurisdictions may still exceed the 115 percent threshold.

## 2040 Housing Distribution Highlights

As a result of these growth distribution factors, more housing growth was directed to locations where the transit system can be utilized more efficiently, where workers can be better connected to jobs, and where residents can access high-quality services. However, growth in each place is tied directly to housing potential as defined by the local jurisdictions. Map 2 on page 41 shows where the region is expected to add housing between 2010 and 2040.

By emphasizing communities with transportation options and strong employment growth, the factors direct substantial housing production to the Peninsula and South Bay, where eight of 15 cities expected to experience the most housing growth are located (Table 13). In sum, two-thirds of the region's overall housing production is directed to these 15 cities, leaving the more than 90 remaining jurisdictions in the region to absorb only limited growth. This development pattern preserves the character of more than 95 percent of the region by focusing growth on less than five percent of the land.

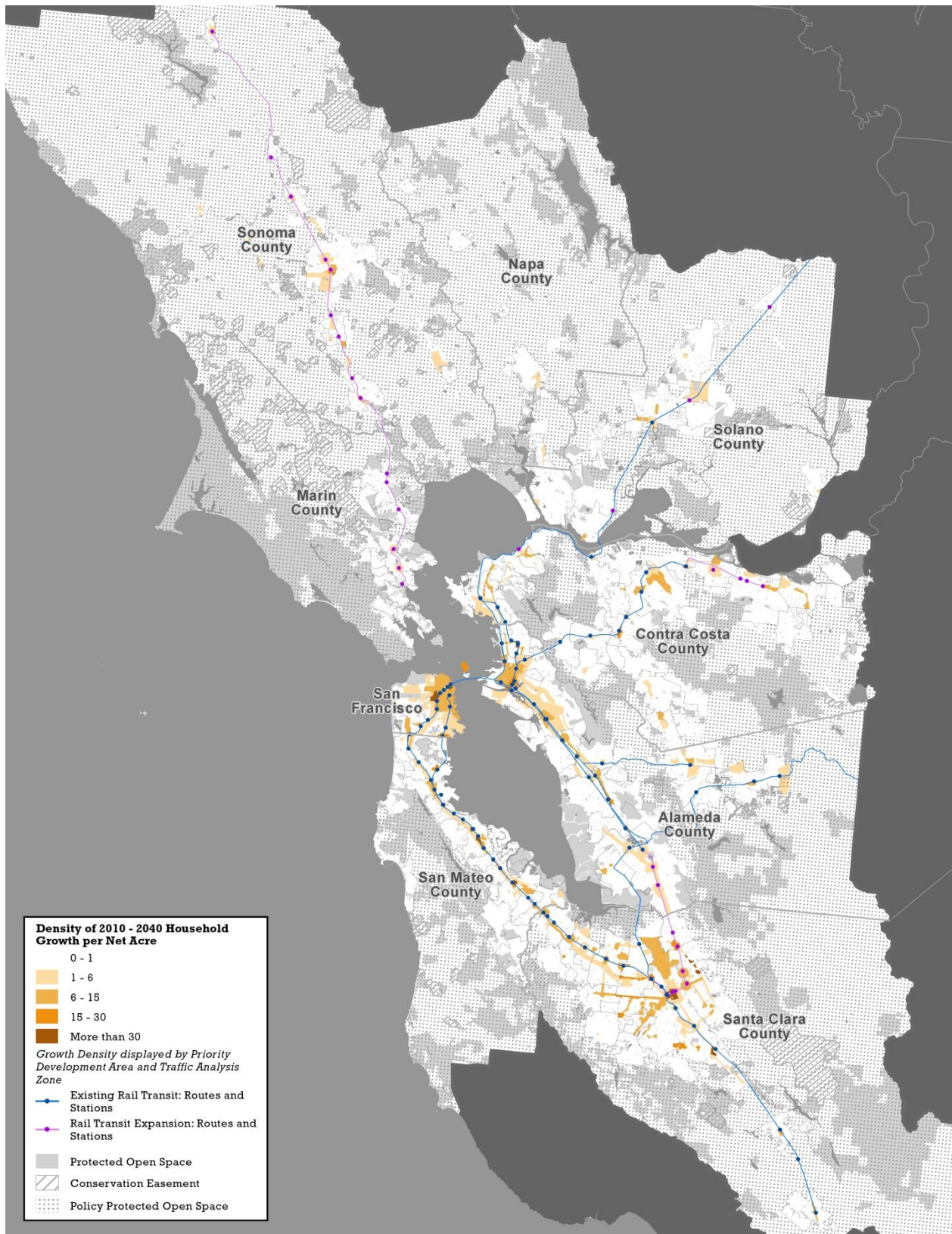
**Table 13. SF Bay Area Total Housing Unit Growth 2010-2040, Top 15 Cities**

Rank	Jurisdiction	Total Housing Units		2010-2040 Housing Unit Growth	
		2010	2040	Total Growth	Percent Growth*
1	San Jose	314,000	443,000	129,000	41%
2	San Francisco	377,000	469,000	92,000	25%
3	Oakland	170,000	221,000	51,000	30%
4	Sunnyvale	56,000	75,000	19,000	34%
5	Concord	47,000	65,000	18,000	38%
6	Fremont	74,000	92,000	18,000	24%
7	Santa Rosa	67,000	83,000	16,000	24%
8	Santa Clara	45,000	59,000	14,000	30%
9	Milpitas	20,000	32,000	13,000	64%
10	Hayward	48,000	61,000	12,000	25%
11	Fairfield	37,000	48,000	11,000	30%
12	San Mateo	40,000	50,000	10,000	25%
13	Richmond	39,000	49,000	10,000	25%
14	Livermore	30,000	40,000	10,000	32%
15	Mountain View	34,000	43,000	9,000	28%

*\*Percentage growth figures may appear inaccurate due to rounding.*

*Source: Jobs Housing Connection Strategy, ABAG (2012)*

**Map 2. Density of Household Growth, 2010-2040**



Source: Jobs-Housing Connection Strategy, ABAG (2012)

## **SUMMARY OF JOBS AND HOUSING DISTRIBUTION (2010-2040)**

Reflecting the distribution growth factors' emphasis on the existing transit network and connecting homes and jobs, San Francisco, San Mateo, Santa Clara and Alameda counties account for the majority of housing growth (77 percent) and job growth (76 percent). Within these counties, the Bay Area's three regional centers—San Francisco, San Jose, and Oakland—will accommodate 42 percent of housing growth and 38 percent of total job growth by 2040. Corridors in the inner Bay Area, including El Camino Real/The Grand Boulevard, San Pablo Corridor, and East 14th–International Boulevard, also represent a major share of both housing and job growth, accommodating 19 percent of regional housing and 11 percent of regional job growth.

Contra Costa County accounts for 11 percent of the region's new jobs and 12 percent of its new homes. Concord, Richmond, Pittsburg, and Walnut Creek—all with PDAs centered on BART stations—take on the largest shares of the county's growth. Overall, PDAs in the county will take on 65 percent of the housing growth and 58 percent of the job growth.

Major suburban employment centers in Alameda and Contra Costa Counties, including Concord, Walnut Creek, and the Tri-Valley communities of Dublin, Pleasanton, Livermore, and San Ramon, account for over 8 percent of the Bay Area's new jobs and nearly 9 percent of its new homes.

With more limited transit access and fewer PDAs, North Bay counties—Marin, Napa, Solano and Sonoma—are expected to take on a much smaller share of regional growth, accounting for 10 percent of new households and 13 percent of new jobs. Much of this growth will be focused in PDAs, such as downtown Santa Rosa, Petaluma, Fairfield, and Vallejo. In Marin, 22 percent of new jobs and 38 percent of new housing are expected to be located in PDAs, while the share is 18 percent and 41 percent in Napa County, 33 percent and 63 percent in Solano County, and 45 percent and 62 percent in Sonoma County. By concentrating growth in the inner Bay Area and communities with frequent transit service, this growth strategy will help North Bay communities maintain their rural and small-town character. While accommodating a very limited amount of new growth, rural centers and corridors will enhance the pedestrian environment and access to local services in the traditional downtowns of many of these communities.

Overall, well over two-thirds of all regional growth by 2040 is allocated within Priority Development Areas. PDAs are expected to accommodate 79 percent (or 521,000 units) of new housing, 77 percent (or 538,000) of new households, and 63 percent (or 703,000) of new jobs. As a result, small cities, single-family neighborhoods and rural

areas throughout the Bay Area will take on a very small share of the region's overall growth and are expected to retain the same scale and character.

Table 14 on page 45 summarizes housing, job and population growth between 2010 and 2040 by county.



**Table 14. SF Bay Area County Housing and Job Growth, 2010-2040**

County	Employment				Housing Units				Households				Population			
	2010	2040	2010-2040		2010 <sup>†</sup>	2040	2010-2040		2010	2040	2010-2040		2010	2040	2010-2040	
			Total	%*			Total	%*			Total	%*			Total	%*
<b>Alameda</b>	694,000	948,000	253,000	36%	583,000	731,000	148,000	25%	545,000	705,000	160,000	29%	1,510,000	1,988,000	478,000	32%
<b>Contra Costa</b>	345,000	467,000	122,000	35%	400,000	480,000	80,000	20%	375,000	463,000	88,000	23%	1,049,000	1,335,000	286,000	27%
<b>Marin</b>	111,000	129,000	18,000	17%	111,000	119,000	8,000	7%	103,000	112,000	9,000	9%	252,000	285,000	33,000	13%
<b>Napa</b>	71,000	90,000	19,000	27%	55,000	61,000	6,000	11%	49,000	56,000	7,000	15%	136,000	164,000	27,000	20%
<b>San Francisco</b>	569,000	759,000	191,000	34%	377,000	469,000	92,000	25%	346,000	447,000	101,000	29%	805,000	1,086,000	280,000	35%
<b>San Mateo</b>	345,000	445,000	100,000	29%	271,000	327,000	56,000	21%	258,000	316,000	58,000	22%	718,000	906,000	188,000	26%
<b>Santa Clara</b>	926,000	1,230,000	304,000	33%	632,000	843,000	211,000	33%	604,000	819,000	215,000	36%	1,782,000	2,426,000	644,000	36%
<b>Solano</b>	132,000	180,000	48,000	36%	153,000	176,000	23,000	15%	142,000	169,000	27,000	19%	413,000	511,000	98,000	24%
<b>Sonoma</b>	192,000	257,000	65,000	34%	205,000	236,000	32,000	16%	186,000	221,000	35,000	19%	484,000	598,000	115,000	24%
<b>REGION*</b>	<b>3,385,000</b>	<b>4,505,000</b>	<b>1,120,000</b>	<b>33%</b>	<b>2,786,000</b>	<b>3,446,000<sup>†</sup></b>	<b>660,000<sup>†</sup></b>	<b>24%</b>	<b>2,608,000</b>	<b>3,308,000</b>	<b>700,000</b>	<b>27%</b>	<b>7,151,000</b>	<b>9,299,000</b>	<b>2,148,000</b>	<b>30%</b>

\*Percentage growth figures may appear inaccurate and sum of county totals may not match regional totals due to rounding.

<sup>†</sup>2010 values include seasonal units; Regional 2040 and growth totals include 4,000 seasonal units that were not distributed throughout the region.

Source: Jobs Housing Connection Strategy, ABAG 2012

## **APPENDIX A: EMPLOYMENT GROWTH BY JURISDICTION AND PDA**

## Employment Growth by PDA and Jurisdiction

### KEY

#### Jurisdiction

Priority Development Area

### Alameda County

Jurisdiction or Area Name	Place Type	JOBS			
		2010	2040	2010-2040	% Growth
<b>Alameda</b>		<b>24,030</b>	<b>33,180</b>	<b>9,150</b>	<b>38%</b>
Naval Air Station	Transit Town Center	1,220	8,420	7,200	
Northern Waterfront	Transit Neighborhood	2,430	3,430	1,000	
<b>Albany</b>		<b>4,210</b>	<b>5,610</b>	<b>1,400</b>	<b>33%</b>
San Pablo Avenue & Solano Avenue	Mixed-Use Corridor	1,910	2,430	520	
<b>Berkeley</b>		<b>77,020</b>	<b>99,220</b>	<b>22,210</b>	<b>29%</b>
Adeline Street	Mixed-Use Corridor	950	1,620	680	
Downtown	City Center	15,200	21,590	6,380	
San Pablo Avenue	Mixed-Use Corridor	2,390	3,340	940	
South Shattuck	Mixed-Use Corridor	1,140	1,440	300	
Telegraph Avenue	Mixed-Use Corridor	1,730	2,560	820	
University Avenue	Mixed-Use Corridor	1,410	1,980	580	
<b>Dublin</b>		<b>16,760</b>	<b>29,300</b>	<b>12,540</b>	<b>75%</b>
Downtown Specific Plan Area	Suburban Center	4,440	8,340	3,900	
Town Center	Suburban Center	310	1,320	1,010	
Transit Center	Suburban Center	0	6,370	6,370	
<b>Emeryville</b>		<b>16,040</b>	<b>23,580</b>	<b>7,540</b>	<b>47%</b>
Mixed-Use Core	City Center	11,260	18,420	7,160	
<b>Fremont</b>		<b>89,900</b>	<b>119,870</b>	<b>29,970</b>	<b>33%</b>
Centerville	Transit Neighborhood	4,020	4,450	430	
City Center	City Center	18,750	24,640	5,890	
Irvington District	Transit Town Center	5,460	5,640	180	
South Fremont/Warm Springs	Suburban Center	12,880	28,970	16,090	
<b>Hayward</b>		<b>69,100</b>	<b>89,900</b>	<b>20,800</b>	<b>30%</b>
Downtown	City Center	7,350	10,590	3,240	
South Hayward BART	Mixed-Use Corridor	320	810	490	
South Hayward BART	Urban Neighborhood	470	1,630	1,160	
The Cannery	Transit Neighborhood	1,450	2,380	930	
Mission Corridor	Mixed-Use Corridor	1,690	2,840	1,150	
<b>Livermore</b>		<b>38,370</b>	<b>51,620</b>	<b>13,250</b>	<b>35%</b>
Downtown	Suburban Center	2,870	3,560	690	
East Side	Suburban Center	16,360	24,440	8,080	
Isabel Avenue/BART Station	Suburban Center	3,290	7,100	3,810	
Planning Area					
<b>Newark</b>		<b>17,870</b>	<b>23,090</b>	<b>5,210</b>	<b>29%</b>
Dumbarton Transit Oriented Develop	Transit Town Center	860	2,100	1,240	
Old Town Mixed Use Area	Transit Neighborhood	180	390	210	
<b>Oakland</b>		<b>190,250</b>	<b>275,490</b>	<b>85,240</b>	<b>45%</b>
Coliseum BART Station Area	Transit Town Center	5,150	12,420	7,270	
Downtown & Jack London Square	Regional Center	88,180	127,620	39,440	
Eastmont Town Center	Urban Neighborhood	3,450	5,310	1,860	
Fruitvale & Dimond Areas	Urban Neighborhood	8,130	15,670	7,540	
MacArthur Transit Village	Urban Neighborhood	10,580	12,860	2,280	
Transit Oriented Development	Mixed-Use Corridor	33,490	41,770	8,280	
Corridors					
West Oakland	Transit Town Center	7,430	14,890	7,470	
<b>Piedmont</b>		<b>1,930</b>	<b>2,410</b>	<b>480</b>	<b>25%</b>
<b>Pleasanton</b>		<b>54,230</b>	<b>69,520</b>	<b>15,300</b>	<b>28%</b>
Hacienda	Suburban Center	9,910	15,320	5,410	
<b>San Leandro</b>		<b>39,900</b>	<b>52,830</b>	<b>12,930</b>	<b>32%</b>
Bay Fair BART Transit Village	Transit Town Center	1,430	2,690	1,260	
Downtown Transit Oriented	City Center	2,790	2,840	50	
Development					
East 14th Street	Mixed-Use Corridor	9,000	15,670	6,670	
<b>Union City</b>		<b>20,560</b>	<b>25,650</b>	<b>5,100</b>	<b>25%</b>
Intermodal Station District	City Center	340	2,810	2,460	
<b>Alameda County Unincorporated</b>		<b>34,270</b>	<b>46,350</b>	<b>12,080</b>	<b>35%</b>
Castro Valley BART	Transit Neighborhood	2,020	2,970	950	
East 14th Street and Mission Street	Mixed-Use Corridor	2,730	4,240	1,500	
Hesperian Boulevard	Transit Neighborhood	1,860	2,590	740	
Meekland Avenue Corridor	Transit Neighborhood	900	1,330	430	

## Employment Growth by PDA and Jurisdiction

### Contra Costa County

Jurisdiction or Area Name	Place Type	JOBS			
		2010	2040	2010-2040	% Growth
<b>Antioch</b>		<b>19,070</b>	<b>25,490</b>	<b>6,420</b>	<b>34%</b>
Hillcrest eBART Station	Suburban Center	20	3,260	3,240	
Rivertown Waterfront	Transit Town Center	4,030	4,520	490	
<b>Brentwood</b>		<b>8,650</b>	<b>11,280</b>	<b>2,620</b>	<b>30%</b>
<b>Clayton</b>		<b>1,540</b>	<b>1,940</b>	<b>400</b>	<b>26%</b>
<b>Concord</b>		<b>47,520</b>	<b>69,310</b>	<b>21,790</b>	<b>46%</b>
Community Reuse Area	Regional Center	170	14,180	14,020	
Community Reuse Area	Transit Neighborhood	0	3,240	3,240	
Downtown	City Center	7,840	10,190	2,350	
<b>Danville</b>		<b>13,440</b>	<b>17,600</b>	<b>4,160</b>	<b>31%</b>
Downtown Danville	Transit Town Center	5,320	7,280	1,960	
<b>El Cerrito</b>		<b>5,880</b>	<b>7,310</b>	<b>1,430</b>	<b>24%</b>
San Pablo Avenue Corridor	Mixed-Use Corridor	3,510	4,340	830	
<b>Hercules</b>		<b>3,880</b>	<b>6,400</b>	<b>2,520</b>	<b>65%</b>
Central Hercules	Transit Neighborhood	800	1,830	1,030	
Waterfront District	Transit Town Center	1,210	1,860	650	
<b>Lafayette</b>		<b>10,640</b>	<b>13,230</b>	<b>2,590</b>	<b>24%</b>
Downtown	Transit Town Center	5,960	7,520	1,560	
<b>Martinez</b>		<b>18,300</b>	<b>22,460</b>	<b>4,160</b>	<b>23%</b>
Downtown	Transit Neighborhood	4,040	5,110	1,070	
<b>Moraga</b>		<b>4,740</b>	<b>5,930</b>	<b>1,190</b>	<b>25%</b>
Moraga Center	Transit Town Center	1,140	1,400	260	
<b>Oakley</b>		<b>3,740</b>	<b>6,670</b>	<b>2,930</b>	<b>78%</b>
Downtown	Transit Town Center	800	1,390	590	
Employment Area	Suburban Center	680	2,290	1,610	
Potential Planning Area	Transit Neighborhood	290	880	590	
<b>Orinda</b>		<b>5,530</b>	<b>6,980</b>	<b>1,450</b>	<b>26%</b>
Downtown	Transit Town Center	3,220	3,980	750	
<b>Pinole</b>		<b>6,740</b>	<b>8,480</b>	<b>1,740</b>	<b>26%</b>
Appian Way Corridor	Suburban Center	2,430	3,190	750	
Old Town	Transit Town Center	2,830	3,440	610	
<b>Pittsburg</b>		<b>14,130</b>	<b>19,740</b>	<b>5,610</b>	<b>40%</b>
Downtown	Transit Neighborhood	1,390	2,500	1,110	
Pittsburg/Bay Point BART Station	Transit Town Center	140	1,450	1,310	
Railroad Avenue eBART Station	Transit Town Center	5,590	7,910	2,320	
<b>Pleasant Hill</b>		<b>17,360</b>	<b>22,920</b>	<b>5,560</b>	<b>32%</b>
Buskirk Avenue Corridor	Mixed-Use Corridor	4,580	6,190	1,610	
Diablo Valley College	Transit Neighborhood	2,550	4,190	1,640	
<b>Richmond</b>		<b>30,670</b>	<b>42,180</b>	<b>11,520</b>	<b>38%</b>
Central Richmond & 23rd Street Corridor	Mixed-Use Corridor	6,600	8,660	2,070	
South Richmond	Transit Neighborhood	6,990	9,320	2,330	
<b>San Pablo</b>		<b>7,460</b>	<b>9,650</b>	<b>2,190</b>	<b>29%</b>
San Pablo Avenue & 23rd Street	Mixed-Use Corridor	5,530	7,510	1,980	
<b>San Ramon</b>		<b>43,880</b>	<b>58,240</b>	<b>14,350</b>	<b>33%</b>
City Center	Suburban Center	10,400	17,760	7,370	
North Camino Ramon	Transit Town Center	11,410	14,440	3,020	
<b>Walnut Creek</b>		<b>41,650</b>	<b>57,300</b>	<b>15,650</b>	<b>38%</b>
West Downtown	Suburban Center	7,440	12,210	4,770	
<b>Contra Costa County Unincorporated</b>		<b>40,100</b>	<b>53,900</b>	<b>13,800</b>	<b>34%</b>
Contra Costa Centre	Mixed-Use Corridor	3,730	4,740	1,010	
Downtown El Sobrante	Mixed-Use Corridor	940	1,430	490	
North Richmond	Transit Neighborhood	1,480	1,980	500	
Pittsburg/Bay Point BART Station	Transit Neighborhood	390	1,140	750	
<b>West Contra Costa Transportation Advisory Committee</b>					
San Pablo Avenue Corridor	Mixed-Use Corridor	3,190	5,160	1,970	

## Employment Growth by PDA and Jurisdiction

### Marin County

Jurisdiction or Area Name	Place Type	JOBS			
		2010	2040	2010-2040	% Growth
<b>Belvedere</b>		430	480	50	12%
<b>Corte Madera</b>		7,940	8,260	320	4%
<b>Fairfax</b>		1,490	1,820	330	22%
<b>Larkspur</b>		7,190	7,810	620	9%
<b>Mill Valley</b>		5,980	6,780	810	14%
<b>Novato</b>		20,890	24,390	3,490	17%
<b>Ross</b>		510	590	80	16%
<b>San Anselmo</b>		3,740	4,350	610	16%
<b>San Rafael</b>		37,620	44,960	7,340	20%
Civic Center/North Rafael Town Center	Transit Town Center	5,660	6,860	1,200	
Downtown	City Center	8,250	10,480	2,230	
<b>Sausalito</b>		6,220	7,630	1,420	23%
<b>Tiburon</b>		2,340	2,690	340	15%
<b>Marin County Unincorporated</b>		16,380	19,360	2,980	18%
Urbanized 101 Corridor	Transit Neighborhood	2,260	2,960	700	

### Napa County

Jurisdiction or Area Name	Place Type	JOBS			
		2010	2040	2010-2040	% Growth
<b>American Canyon</b>		2,920	4,160	1,240	42%
Highway 29 Corridor	Mixed-Use Corridor	1,280	2,100	810	
<b>Calistoga</b>		2,220	2,640	420	19%
<b>Napa</b>		33,950	44,520	10,570	31%
Downtown Napa/Soscol Corridor	Transit Neighborhood	10,950	13,570	2,620	
<b>St. Helena</b>		5,340	6,230	890	17%
<b>Yountville</b>		1,600	1,980	380	
<b>Napa County Unincorporated</b>		24,630	30,000	5,380	22%

### San Francisco County

Jurisdiction or Area Name	Place Type	JOBS			
		2010	2040	2010-2040	% Growth
<b>San Francisco</b>		568,720	759,470	190,740	34%
19th Avenue	Transit Town Center	9,980	13,570	3,580	
Balboa Park	Transit Neighborhood	2,690	3,460	770	
Bayview/Hunters Point	Urban Neighborhood	19,590	29,260	9,660	
Shipyards/Candlestick Point					
Downtown-Van Ness-Geary	Regional Center	315,570	368,140	52,580	
Eastern Neighborhoods	Urban Neighborhood	61,070	70,890	9,820	
Market & Octavia	Urban Neighborhood	31,850	34,790	2,940	
Mission Bay	Urban Neighborhood	2,770	27,200	24,430	
Mission-San Jose Corridor	Mixed-Use Corridor	12,680	18,760	6,080	
Port of San Francisco	Mixed-Use Corridor	5,430	24,400	18,970	
San Francisco/San Mateo Bi-County Area (with Brisbane)	Transit Neighborhood	1,720	2,580	860	
Transbay Terminal	Regional Center	7,950	37,660	29,710	
Treasure Island	Transit Town Center	260	3,010	2,750	

## Employment Growth by PDA and Jurisdiction

### San Mateo County

Jurisdiction or Area Name	Place Type	JOBS			
		2010	2040	2010-2040	% Growth
<b>Atherton</b>		<b>2,610</b>	<b>3,170</b>	<b>560</b>	<b>21%</b>
<b>Belmont</b>		<b>8,220</b>	<b>10,500</b>	<b>2,280</b>	<b>28%</b>
<i>Villages of Belmont</i>	<i>Mixed-Use Corridor</i>	<i>1,260</i>	<i>2,510</i>	<i>1,260</i>	
<b>Brisbane</b>		<b>7,220</b>	<b>8,280</b>	<b>1,060</b>	<b>15%</b>
<i>San Francisco/San Mateo Bi-County Area (with San Francisco)</i>	<i>Suburban Center</i>	<i>550</i>	<i>1,100</i>	<i>540</i>	
<b>Burlingame</b>		<b>30,420</b>	<b>39,210</b>	<b>8,790</b>	<b>29%</b>
<i>Burlingame El Camino Real</i>	<i>Transit Town Center</i>	<i>12,480</i>	<i>18,460</i>	<i>5,980</i>	
<b>Colma</b>		<b>2,790</b>	<b>3,210</b>	<b>420</b>	<b>15%</b>
<b>Daly City</b>		<b>21,000</b>	<b>26,910</b>	<b>5,900</b>	<b>28%</b>
<i>Bayshore</i>	<i>Transit Town Center</i>	<i>1,110</i>	<i>3,260</i>	<i>2,160</i>	
<i>Mission Boulevard</i>	<i>Mixed-Use Corridor</i>	<i>3,790</i>	<i>5,240</i>	<i>1,450</i>	
<b>East Palo Alto</b>		<b>2,720</b>	<b>3,750</b>	<b>1,020</b>	<b>38%</b>
<i>Ravenswood</i>	<i>Transit Town Center</i>	<i>810</i>	<i>1,230</i>	<i>430</i>	
<b>Foster City</b>		<b>13,890</b>	<b>17,490</b>	<b>3,600</b>	<b>26%</b>
<b>Half Moon Bay</b>		<b>5,110</b>	<b>6,120</b>	<b>1,010</b>	<b>20%</b>
<b>Hillsborough</b>		<b>2,190</b>	<b>2,620</b>	<b>430</b>	<b>20%</b>
<b>Menlo Park</b>		<b>28,990</b>	<b>35,110</b>	<b>6,120</b>	<b>21%</b>
<i>El Camino Real Corridor and Downtown</i>	<i>Transit Town Center</i>	<i>5,630</i>	<i>7,680</i>	<i>2,050</i>	
<b>Millbrae</b>		<b>6,950</b>	<b>9,410</b>	<b>2,460</b>	<b>35%</b>
<i>Transit Station Area</i>	<i>Mixed-Use Corridor</i>	<i>1,350</i>	<i>3,400</i>	<i>2,060</i>	
<b>Pacifica</b>		<b>5,920</b>	<b>7,170</b>	<b>1,250</b>	<b>21%</b>
<b>Portola Valley</b>		<b>1,510</b>	<b>1,780</b>	<b>270</b>	<b>18%</b>
<b>Redwood City</b>		<b>58,340</b>	<b>77,830</b>	<b>19,490</b>	<b>33%</b>
<i>Downtown</i>	<i>City Center</i>	<i>10,470</i>	<i>14,110</i>	<i>3,640</i>	
<i>Broadway/Veterans Boulevard Corridor</i>	<i>Mixed-Use Corridor</i>	<i>8,540</i>	<i>11,980</i>	<i>3,440</i>	
<b>San Bruno</b>		<b>12,930</b>	<b>17,250</b>	<b>4,320</b>	<b>33%</b>
<i>Transit Corridors</i>	<i>Mixed-Use Corridor</i>	<i>6,750</i>	<i>10,710</i>	<i>3,960</i>	
<b>San Carlos</b>		<b>16,170</b>	<b>19,790</b>	<b>3,620</b>	<b>22%</b>
<i>Railroad Corridor</i>	<i>Transit Town Center</i>	<i>1,950</i>	<i>3,110</i>	<i>1,160</i>	
<b>San Mateo</b>		<b>52,930</b>	<b>73,460</b>	<b>20,530</b>	<b>39%</b>
<i>Downtown</i>	<i>City Center</i>	<i>4,440</i>	<i>7,050</i>	<i>2,610</i>	
<i>El Camino Real</i>	<i>Mixed-Use Corridor</i>	<i>2,270</i>	<i>5,680</i>	<i>3,410</i>	
<i>Rail Corridor</i>	<i>Transit Neighborhood</i>	<i>8,840</i>	<i>18,700</i>	<i>9,870</i>	
<b>South San Francisco</b>		<b>46,170</b>	<b>57,400</b>	<b>11,230</b>	<b>24%</b>
<i>Downtown</i>	<i>Transit Town Center</i>	<i>2,670</i>	<i>6,920</i>	<i>4,250</i>	
<b>Woodside</b>		<b>1,770</b>	<b>2,070</b>	<b>310</b>	<b>18%</b>
<b>San Mateo County Unincorporated</b>		<b>17,350</b>	<b>22,790</b>	<b>5,440</b>	<b>31%</b>
<b>City County Association of Governments of San Mateo County</b>					
<i>El Camino Real</i>	<i>Mixed-Use Corridor</i>	<i>4,590</i>	<i>6,840</i>	<i>2,270</i>	

## Employment Growth by PDA and Jurisdiction

### Santa Clara County

Jurisdiction or Area Name	Place Type	JOBS			
		2010	2040	2010-2040	% Growth
<b>Campbell</b>		<b>27,230</b>	<b>35,050</b>	<b>7,820</b>	<b>29%</b>
Central Redevelopment Area	Transit Neighborhood	7,880	10,220	2,340	
<b>Cupertino</b>		<b>25,990</b>	<b>33,350</b>	<b>7,360</b>	<b>28%</b>
<b>Gilroy</b>		<b>17,600</b>	<b>21,900</b>	<b>4,300</b>	<b>24%</b>
Downtown	Transit Town Center	2,370	3,600	1,230	
<b>Los Altos</b>		<b>14,700</b>	<b>18,160</b>	<b>3,460</b>	<b>24%</b>
<b>Los Altos Hills</b>		<b>3,580</b>	<b>4,440</b>	<b>860</b>	<b>24%</b>
<b>Los Gatos</b>		<b>23,580</b>	<b>28,980</b>	<b>5,390</b>	<b>23%</b>
<b>Milpitas</b>		<b>45,060</b>	<b>57,640</b>	<b>12,580</b>	<b>28%</b>
Transit Area	Suburban Center	5,240	9,560	4,320	
<b>Monte Sereno</b>		<b>450</b>	<b>570</b>	<b>120</b>	<b>27%</b>
<b>Morgan Hill</b>		<b>17,520</b>	<b>22,080</b>	<b>4,560</b>	<b>26%</b>
Downtown	Transit Town Center	1,660	3,000	1,340	
<b>Mountain View</b>		<b>47,800</b>	<b>63,380</b>	<b>15,570</b>	<b>33%</b>
Downtown	Transit Town Center	9,410	10,250	850	
El Camino Real Corridor	Mixed-Use Corridor	5,770	6,630	850	
North Bayshore	Suburban Center	7,390	15,070	7,690	
San Antonio Center	Transit Town Center	3,150	4,330	1,180	
Whisman Station	Transit Neighborhood	650	1,210	560	
<b>Palo Alto</b>		<b>89,370</b>	<b>119,030</b>	<b>29,650</b>	<b>33%</b>
California Avenue	Transit Neighborhood	3,370	5,030	1,660	
<b>San Jose</b>		<b>375,360</b>	<b>522,050</b>	<b>146,680</b>	<b>39%</b>
Bascom TOD Corridor	Mixed-Use Corridor	11,520	12,910	1,390	
Bascom Urban Village	Mixed-Use Corridor	1,700	2,660	960	
Berryessa Station	Transit Neighborhood	6,140	12,180	6,040	
Blossom Hill/Snell Urban Village	Mixed-Use Corridor	880	1,720	840	
Camden Urban Village	Mixed-Use Corridor	5,600	7,630	2,030	
Capitol Corridor Urban Villages	Mixed-Use Corridor	2,340	5,580	3,250	
Capitol/Tully/King Urban Villages	Suburban Center	4,070	7,060	2,990	
Communications Hill	Transit Town Center	3,940	5,650	1,710	
Cottle Transit Village	Suburban Center	2,550	3,040	490	
Downtown "Frame"	City Center	26,760	31,090	4,330	
East Santa Clara/Alum Rock Corridor	Mixed-Use Corridor	9,950	13,380	3,430	
Greater Downtown	Regional Center	27,950	55,970	28,020	
North San Jose	Regional Center	84,290	130,190	45,900	
Oakridge/Almaden Plaza Urban Village	Suburban Center	5,430	9,700	4,270	
Saratoga TOD Corridor	Mixed-Use Corridor	3,520	5,520	2,000	
Stevens Creek TOD Corridor	Mixed-Use Corridor	5,680	8,020	2,340	
West San Carlos & Southwest Expressway Corridors	Mixed-Use Corridor	8,940	15,600	6,660	
Westgate/El Paseo Urban Village	Suburban Center	3,440	5,230	1,790	
Winchester Boulevard TOD Corridor	Mixed-Use Corridor	4,040	6,820	2,780	
<b>Santa Clara</b>		<b>112,460</b>	<b>145,560</b>	<b>33,100</b>	<b>29%</b>
El Camino Real Focus Area	Mixed-Use Corridor	4,390	6,980	2,590	
Santa Clara Station Focus Area	City Center	10,020	12,750	2,740	
<b>Saratoga</b>		<b>11,870</b>	<b>14,500</b>	<b>2,630</b>	<b>22%</b>
<b>Sunnyvale</b>		<b>74,610</b>	<b>95,320</b>	<b>20,710</b>	<b>28%</b>
Downtown & Caltrain Station	Transit Town Center	3,750	5,660	1,910	
East Sunnyvale	Urban Neighborhood	8,050	9,240	1,180	
El Camino Real Corridor	Mixed-Use Corridor	13,190	16,390	3,200	
Lawrence Station Transit Village	Transit Neighborhood	4,160	5,380	1,220	
Tasman Station ITR	Mixed-Use Corridor	1,540	2,530	980	
<b>Santa Clara County Unincorporated</b>		<b>39,060</b>	<b>47,800</b>	<b>8,740</b>	<b>22%</b>
<b>Valley Transportation Authority</b>					
Cores, Corridors, and Station Areas	Mixed-Use Corridor	90,770	118,380	27,610	

## Employment Growth by PDA and Jurisdiction

### Solano County

Jurisdiction or Area Name	Place Type	JOBS			
		2010	2040	2010-2040	% Growth
<b>Benicia</b>		<b>14,240</b>	<b>18,920</b>	<b>4,680</b>	<b>33%</b>
Downtown	Transit Neighborhood	2,540	2,840	300	
<b>Dixon</b>		<b>4,460</b>	<b>5,780</b>	<b>1,310</b>	<b>29%</b>
Downtown	Transit Town Center	560	830	280	
<b>Fairfield</b>		<b>39,300</b>	<b>53,310</b>	<b>14,000</b>	<b>36%</b>
Downtown South (Jefferson Street)	Suburban Center	2,970	4,280	1,320	
Fairfield-Vacaville Train Station	Transit Town Center	340	2,650	2,310	
North Texas Street Core	Mixed-Use Corridor	1,420	2,420	1,000	
West Texas Street Gateway	Mixed-Use Corridor	1,680	2,890	1,210	
<b>Rio Vista</b>		<b>1,790</b>	<b>2,340</b>	<b>550</b>	<b>31%</b>
<b>Suisun City</b>		<b>3,080</b>	<b>4,520</b>	<b>1,440</b>	<b>47%</b>
Downtown & Waterfront	Transit Town Center	1,040	1,960	920	
<b>Vacaville</b>		<b>29,800</b>	<b>41,120</b>	<b>11,310</b>	<b>38%</b>
Allison Area	Suburban Center	900	1,710	810	
Downtown	Transit Town Center	2,800	3,800	1,000	
<b>Vallejo</b>		<b>31,660</b>	<b>43,060</b>	<b>11,410</b>	<b>36%</b>
Waterfront & Downtown	Suburban Center	3,640	5,940	2,300	
<b>Solano County Unincorporated</b>		<b>8,010</b>	<b>10,860</b>	<b>2,850</b>	<b>36%</b>

### Sonoma County

Jurisdiction or Area Name	Place Type	JOBS			
		2010	2040	2010-2040	% Growth
<b>Cloverdale</b>		<b>1,570</b>	<b>2,270</b>	<b>700</b>	<b>45%</b>
Downtown/SMART Transit Area	Transit Town Center	880	1,390	510	
<b>Cotati</b>		<b>2,920</b>	<b>3,860</b>	<b>940</b>	<b>32%</b>
Downtown and Cotati Depot	Transit Town Center	650	1,190	550	
<b>Healdsburg</b>		<b>6,440</b>	<b>8,210</b>	<b>1,780</b>	<b>28%</b>
<b>Petaluma</b>		<b>28,830</b>	<b>38,690</b>	<b>9,860</b>	<b>34%</b>
Central, Turning Basin/Lower Reach	Suburban Center	3,110	8,330	5,220	
<b>Rohnert Park</b>		<b>11,730</b>	<b>16,320</b>	<b>4,590</b>	<b>39%</b>
Central Rohnert Park	Transit Town Center	3,350	5,170	1,820	
Sonoma Mountain Village	Suburban Center	140	1,190	1,050	
<b>Santa Rosa</b>		<b>75,460</b>	<b>103,930</b>	<b>28,470</b>	<b>38%</b>
Downtown Station Area	City Center	9,250	13,800	4,550	
Mendocino Avenue/Santa Rosa Avenue Corridor	Mixed-Use Corridor	23,230	30,080	6,850	
North Santa Rosa Station	Suburban Center	8,960	13,060	4,090	
Roseland	Transit Neighborhood	2,650	3,890	1,240	
Sebastopol Road Corridor	Mixed-Use Corridor	2,110	3,450	1,340	
<b>Sebastopol</b>		<b>5,650</b>	<b>7,300</b>	<b>1,650</b>	<b>29%</b>
Nexus Area	Transit Town Center	5,440	7,010	1,570	
<b>Sonoma</b>		<b>6,650</b>	<b>8,640</b>	<b>1,990</b>	<b>30%</b>
<b>Windsor</b>		<b>5,610</b>	<b>7,760</b>	<b>2,150</b>	<b>38%</b>
Redevelopment Area	Suburban Center	1,020	1,830	810	
<b>Sonoma County Unincorporated</b>		<b>47,150</b>	<b>60,470</b>	<b>13,320</b>	<b>28%</b>



## **APPENDIX B: HOUSING GROWTH BY JURISDICTION AND PDA**

## Household Growth by PDA and Jurisdiction

### KEY

#### Jurisdiction

Priority Development Area

### Alameda County

Jurisdiction or Area Name	Place Type	HOUSING UNITS				HOUSEHOLDS			
		2010	2040	2010-2040	% Growth	2010	2040	2010-2040	% Growth
<b>Alameda</b>		<b>32,350</b>	<b>38,240</b>	<b>5,890</b>	<b>18%</b>	<b>30,120</b>	<b>36,570</b>	<b>6,440</b>	<b>21%</b>
Naval Air Station	Transit Town Center	1,460	5,470	4,010		1,090	5,040	3,950	
Northern Waterfront	Transit Neighborhood	1,070	1,830	760		990	1,760	780	
<b>Albany</b>		<b>7,890</b>	<b>9,060</b>	<b>1,170</b>	<b>15%</b>	<b>7,400</b>	<b>8,740</b>	<b>1,340</b>	<b>18%</b>
San Pablo Avenue & Solano Avenue	Mixed-Use Corridor	1,810	2,060	240		1,690	1,970	280	
<b>Berkeley</b>		<b>49,450</b>	<b>58,730</b>	<b>9,280</b>	<b>19%</b>	<b>46,030</b>	<b>55,980</b>	<b>9,950</b>	<b>22%</b>
Adeline Street	Mixed-Use Corridor	690	940	250		620	900	280	
Downtown	City Center	2,690	6,840	4,150		2,570	6,670	4,100	
San Pablo Avenue	Mixed-Use Corridor	1,630	2,500	870		1,440	2,340	900	
South Shattuck	Mixed-Use Corridor	340	460	110		310	440	120	
Telegraph Avenue	Mixed-Use Corridor	1,110	1,470	360		990	1,400	410	
University Avenue	Mixed-Use Corridor	1,660	2,310	650		1,560	2,220	660	
<b>Dublin</b>		<b>15,780</b>	<b>24,320</b>	<b>8,530</b>	<b>54%</b>	<b>14,910</b>	<b>23,610</b>	<b>8,700</b>	<b>58%</b>
Downtown Specific Plan Area	Suburban Center	830	1,790	960		790	1,750	950	
Town Center	Suburban Center	4,130	5,990	1,860		3,750	5,770	2,020	
Transit Center	Suburban Center	670	3,810	3,130		620	3,720	3,100	
<b>Emeryville</b>		<b>6,650</b>	<b>12,110</b>	<b>5,470</b>	<b>82%</b>	<b>5,690</b>	<b>11,620</b>	<b>5,920</b>	<b>104%</b>
Mixed-Use Core	City Center	4,150	9,620	5,470		3,530	9,300	5,770	
<b>Fremont</b>		<b>73,990</b>	<b>91,610</b>	<b>17,620</b>	<b>24%</b>	<b>71,000</b>	<b>89,080</b>	<b>18,080</b>	<b>25%</b>
Centerville	Transit Neighborhood	10,850	13,360	2,510		10,360	12,980	2,620	
City Center	City Center	7,310	10,210	2,900		6,870	9,910	3,040	
Irvington District	Transit Town Center	7,280	10,260	2,980		6,910	9,990	3,080	
South Fremont/Warm Springs	Suburban Center	2,330	5,310	2,980		2,180	5,150	2,970	
<b>Hayward</b>		<b>48,300</b>	<b>60,580</b>	<b>12,290</b>	<b>25%</b>	<b>45,370</b>	<b>58,820</b>	<b>13,460</b>	<b>30%</b>
Downtown	City Center	2,290	5,510	3,220		2,100	5,370	3,280	
South Hayward BART	Mixed-Use Corridor	180	1,360	1,170		170	1,330	1,160	
South Hayward BART	Urban Neighborhood	1,800	4,490	2,700		1,660	4,400	2,740	
The Cannery	Transit Neighborhood	340	1,090	750		330	1,070	740	
Mission Corridor	Mixed-Use Corridor	1,480	3,320	1,840		1,230	3,210	1,980	
<b>Livermore</b>		<b>30,340</b>	<b>40,020</b>	<b>9,670</b>	<b>32%</b>	<b>29,130</b>	<b>38,920</b>	<b>9,780</b>	<b>34%</b>
Downtown	Suburban Center	1,020	2,690	1,680		920	2,620	1,710	
East Side	Suburban Center	100	4,370	4,270		90	4,280	4,190	
Isabel Avenue/BART Station	Suburban Center	530	4,000	3,470		470	3,910	3,440	
Planning Area									
<b>Newark</b>		<b>13,410</b>	<b>17,090</b>	<b>3,670</b>	<b>27%</b>	<b>12,970</b>	<b>16,630</b>	<b>3,660</b>	<b>28%</b>
Dumbarton Transit Oriented Develop	Transit Town Center	140	2,540	2,400		140	2,500	2,360	
Old Town Mixed Use Area	Transit Neighborhood	600	970	370		580	940	370	
<b>Oakland</b>		<b>169,710</b>	<b>221,200</b>	<b>51,490</b>	<b>30%</b>	<b>153,790</b>	<b>212,500</b>	<b>58,710</b>	<b>38%</b>
Coliseum BART Station Area	Transit Town Center	3,870	10,720	6,850		3,440	10,420	6,980	
Downtown & Jack London Square	Regional Center	11,910	26,190	14,290		10,630	25,390	14,760	
Eastmont Town Center	Urban Neighborhood	6,850	7,260	410		5,960	6,840	880	
Fruitvale & Dimond Areas	Urban Neighborhood	14,210	18,580	4,370		12,840	17,820	4,990	
MacArthur Transit Village	Urban Neighborhood	8,820	13,910	5,090		8,030	13,410	5,380	
Transit Oriented Development	Mixed-Use Corridor	67,370	77,570	10,200		60,970	74,390	13,410	
Corridors									
West Oakland	Transit Town Center	10,830	17,690	6,870		9,030	16,940	7,910	
<b>Piedmont</b>		<b>3,920</b>	<b>4,020</b>	<b>90</b>	<b>2%</b>	<b>3,800</b>	<b>3,890</b>	<b>90</b>	<b>2%</b>
<b>Pleasanton</b>		<b>26,050</b>	<b>33,200</b>	<b>7,150</b>	<b>27%</b>	<b>25,250</b>	<b>32,330</b>	<b>7,090</b>	<b>28%</b>
Hacienda	Suburban Center	1,310	4,900	3,590		1,270	4,800	3,530	
<b>San Leandro</b>		<b>32,420</b>	<b>39,630</b>	<b>7,210</b>	<b>22%</b>	<b>30,720</b>	<b>38,390</b>	<b>7,670</b>	<b>25%</b>
Bay Fair BART Transit Village	Transit Town Center	660	1,560	900		630	1,520	890	
Downtown Transit Oriented Development	City Center	4,210	7,900	3,690		3,930	7,690	3,760	
East 14th Street	Mixed-Use Corridor	4,920	6,240	1,310		4,490	5,980	1,480	
<b>Union City</b>		<b>21,260</b>	<b>24,270</b>	<b>3,010</b>	<b>14%</b>	<b>20,430</b>	<b>23,650</b>	<b>3,220</b>	<b>16%</b>
Intermodal Station District	City Center	1,060	1,850	800		1,030	1,810	780	
<b>Alameda County Unincorporated</b>		<b>51,020</b>	<b>56,450</b>	<b>5,430</b>	<b>11%</b>	<b>48,520</b>	<b>54,570</b>	<b>6,050</b>	<b>12%</b>
Castro Valley BART	Transit Neighborhood	1,480	2,150	670		1,400	2,090	690	
East 14th Street and Mission Street	Mixed-Use Corridor	7,190	9,120	1,930		6,740	8,800	2,060	
Hesperian Boulevard	Transit Neighborhood	2,860	3,560	690		2,740	3,450	720	
Meekland Avenue Corridor	Transit Neighborhood	1,400	1,860	460		1,300	1,790	500	

## Household Growth by PDA and Jurisdiction

### Contra Costa County

Jurisdiction or Area Name	Place Type	HOUSING UNITS				HOUSEHOLDS			
		2010	2040	2010-2040	% Growth	2010	2040	2010-2040	% Growth
<b>Antioch</b>		<b>34,850</b>	<b>40,320</b>	<b>5,470</b>	<b>16%</b>	<b>32,250</b>	<b>38,780</b>	<b>6,530</b>	<b>20%</b>
Hillcrest eBART Station	Suburban Center	160	2,450	2,290		150	2,400	2,250	
Rivertown Waterfront	Transit Town Center	1,600	3,420	1,830		1,430	3,330	1,900	
<b>Brentwood</b>		<b>17,520</b>	<b>18,370</b>	<b>850</b>	<b>5%</b>	<b>16,490</b>	<b>17,660</b>	<b>1,160</b>	<b>7%</b>
<b>Clayton</b>		<b>4,090</b>	<b>4,200</b>	<b>110</b>	<b>3%</b>	<b>4,010</b>	<b>4,120</b>	<b>110</b>	<b>3%</b>
<b>Concord</b>		<b>47,130</b>	<b>65,170</b>	<b>18,040</b>	<b>38%</b>	<b>44,280</b>	<b>63,160</b>	<b>18,880</b>	<b>43%</b>
Community Reuse Area	Regional Center	150	3,420	3,270		70	3,320	3,240	
Community Reuse Area	Transit Neighborhood	0	9,120	9,120		0	8,960	8,960	
Downtown	City Center	4,600	7,740	3,140		4,200	7,530	3,320	
<b>Danville</b>		<b>15,930</b>	<b>17,430</b>	<b>1,500</b>	<b>9%</b>	<b>15,420</b>	<b>16,910</b>	<b>1,490</b>	<b>10%</b>
Downtown Danville	Transit Town Center	1,450	2,200	750		1,370	2,120	760	
<b>El Cerrito</b>		<b>10,720</b>	<b>12,000</b>	<b>1,280</b>	<b>12%</b>	<b>10,140</b>	<b>11,550</b>	<b>1,410</b>	<b>14%</b>
San Pablo Avenue Corridor	Mixed-Use Corridor	1,340	2,360	1,020		1,220	2,280	1,060	
<b>Hercules</b>		<b>8,550</b>	<b>13,070</b>	<b>4,510</b>	<b>53%</b>	<b>8,120</b>	<b>12,680</b>	<b>4,570</b>	<b>56%</b>
Central Hercules	Transit Neighborhood	410	2,850	2,440		400	2,800	2,400	
Waterfront District	Transit Town Center	690	1,700	1,020		640	1,660	1,020	
<b>Lafayette</b>		<b>9,650</b>	<b>11,020</b>	<b>1,370</b>	<b>14%</b>	<b>9,220</b>	<b>10,640</b>	<b>1,420</b>	<b>15%</b>
Downtown	Transit Town Center	2,030	2,970	940		1,890	2,880	990	
<b>Martinez</b>		<b>14,980</b>	<b>16,240</b>	<b>1,260</b>	<b>8%</b>	<b>14,290</b>	<b>15,690</b>	<b>1,400</b>	<b>10%</b>
Downtown	Transit Neighborhood	820	1,510	690		750	1,460	710	
<b>Moraga</b>		<b>5,750</b>	<b>6,540</b>	<b>790</b>	<b>14%</b>	<b>5,570</b>	<b>6,350</b>	<b>780</b>	<b>14%</b>
Moraga Center	Transit Town Center	440	780	340		430	760	330	
<b>Oakley</b>		<b>11,480</b>	<b>17,010</b>	<b>5,530</b>	<b>48%</b>	<b>10,730</b>	<b>16,450</b>	<b>5,720</b>	<b>53%</b>
Downtown	Transit Town Center	560	1,740	1,180		520	1,690	1,170	
Employment Area	Suburban Center	580	1,480	900		560	1,450	890	
Potential Planning Area	Transit Neighborhood	1,060	2,310	1,250		980	2,240	1,260	
<b>Orinda</b>		<b>6,800</b>	<b>7,610</b>	<b>800</b>	<b>12%</b>	<b>6,550</b>	<b>7,450</b>	<b>900</b>	<b>14%</b>
Downtown	Transit Town Center	230	440	210		330	530	210	
<b>Pinole</b>		<b>7,160</b>	<b>8,240</b>	<b>1,080</b>	<b>15%</b>	<b>6,780</b>	<b>7,970</b>	<b>1,200</b>	<b>18%</b>
Appian Way Corridor	Suburban Center	560	1,150	590		520	1,110	590	
Old Town	Transit Town Center	1,430	1,540	110		1,300	1,470	180	
<b>Pittsburg</b>		<b>21,130</b>	<b>28,510</b>	<b>7,380</b>	<b>35%</b>	<b>19,530</b>	<b>27,500</b>	<b>7,980</b>	<b>41%</b>
Downtown	Transit Neighborhood	1,870	3,700	1,820		1,600	3,540	1,950	
Pittsburg/Bay Point BART Station	Transit Town Center	0	1,090	1,090		0	1,070	1,070	
Railroad Avenue eBART Station	Transit Town Center	3,930	7,470	3,530		3,600	7,240	3,640	
<b>Pleasant Hill</b>		<b>14,320</b>	<b>15,530</b>	<b>1,210</b>	<b>8%</b>	<b>13,710</b>	<b>15,060</b>	<b>1,350</b>	<b>10%</b>
Buskirk Avenue Corridor	Mixed-Use Corridor	1,730	1,820	90		1,620	1,750	130	
Diablo Valley College	Transit Neighborhood	360	660	300		330	640	310	
<b>Richmond</b>		<b>39,330</b>	<b>49,020</b>	<b>9,690</b>	<b>25%</b>	<b>36,090</b>	<b>47,090</b>	<b>10,990</b>	<b>30%</b>
Central Richmond & 23rd Street Corridor	Mixed-Use Corridor	5,930	7,250	1,320		5,340	6,940	1,610	
South Richmond	Transit Neighborhood	3,590	4,960	1,380		3,250	4,740	1,490	
<b>San Pablo</b>		<b>9,570</b>	<b>11,460</b>	<b>1,890</b>	<b>20%</b>	<b>8,760</b>	<b>11,030</b>	<b>2,270</b>	<b>26%</b>
San Pablo Avenue & 23rd Street	Mixed-Use Corridor	2,780	4,240	1,470		2,530	4,110	1,580	
<b>San Ramon</b>		<b>26,220</b>	<b>31,550</b>	<b>5,330</b>	<b>20%</b>	<b>25,280</b>	<b>30,720</b>	<b>5,440</b>	<b>22%</b>
City Center	Suburban Center	490	1,410	920		480	1,390	910	
North Camino Ramon	Transit Town Center	130	1,910	1,780		40	1,820	1,780	
<b>Walnut Creek</b>		<b>32,680</b>	<b>40,050</b>	<b>7,370</b>	<b>23%</b>	<b>30,440</b>	<b>38,520</b>	<b>8,070</b>	<b>27%</b>
West Downtown	Suburban Center	1,520	4,530	3,010		1,270	4,400	3,130	
<b>Contra Costa County Unincorporated</b>		<b>62,400</b>	<b>67,070</b>	<b>4,670</b>	<b>7%</b>	<b>57,710</b>	<b>63,740</b>	<b>6,040</b>	<b>10%</b>
Contra Costa Centre	Mixed-Use Corridor	1,910	2,380	470		1,780	2,310	530	
Downtown El Sobrante	Mixed-Use Corridor	1,810	2,290	480		1,670	2,190	510	
North Richmond	Transit Neighborhood	1,240	1,530	290		1,030	1,410	380	
Pittsburg/Bay Point BART Station	Transit Neighborhood	1,170	1,870	700		1,020	1,800	780	
<b>West Contra Costa Transportation Advisory Committee</b>									
San Pablo Avenue Corridor	Mixed-Use Corridor	4,230	6,700	2,470		3,900	6,480	2,590	

## Household Growth by PDA and Jurisdiction

### Marin County

Jurisdiction or Area Name	Place Type	HOUSING UNITS				HOUSEHOLDS			
		2010	2040	2010-2040	% Growth	2010	2040	2010-2040	% Growth
<b>Belvedere</b>		1,050	1,070	20	2%	930	970	40	4%
<b>Corte Madera</b>		4,030	4,250	230	6%	3,790	4,080	280	7%
<b>Fairfax</b>		3,590	3,790	210	6%	3,380	3,620	240	7%
<b>Larkspur</b>		6,380	6,770	390	6%	5,910	6,450	540	9%
<b>Mill Valley</b>		6,530	6,920	380	6%	6,080	6,540	450	7%
<b>Novato</b>		21,160	22,220	1,060	5%	20,280	21,450	1,170	6%
<b>Ross</b>		880	940	50	6%	800	860	60	8%
<b>San Anselmo</b>		5,540	5,790	250	5%	5,240	5,530	290	6%
<b>San Rafael</b>		24,010	27,400	3,390	14%	22,760	26,490	3,720	16%
Civic Center/North Rafael Town Center	Transit Town Center	1,990	3,030	1,040		1,900	2,950	1,050	
Downtown	City Center	2,610	3,960	1,350		2,420	3,830	1,410	
<b>Sausalito</b>		4,540	4,790	250	6%	4,110	4,460	350	9%
<b>Tiburon</b>		4,030	4,250	220	5%	3,730	4,000	270	7%
<b>Marin County Unincorporated</b>		29,500	30,550	1,050	4%	26,190	27,570	1,380	5%
Urbanized 101 Corridor	Transit Neighborhood	4,580	5,020	440		4,290	4,810	510	

### Napa County

Jurisdiction or Area Name	Place Type	HOUSING UNITS				HOUSEHOLDS			
		2010	2040	2010-2040	% Growth	2010	2040	2010-2040	% Growth
<b>American Canyon</b>		5,980	7,890	1,910	32%	5,660	7,630	1,970	35%
Highway 29 Corridor	Mixed-Use Corridor	440	1,980	1,540		400	1,930	1,530	
<b>Calistoga</b>		2,320	2,370	50	2%	2,020	2,130	110	5%
<b>Napa</b>		30,150	33,410	3,270	11%	28,170	32,010	3,840	14%
Downtown Napa/Soscol Corridor	Transit Neighborhood	790	1,730	940		730	1,670	940	
<b>St. Helena</b>		2,780	2,830	60	2%	2,400	2,520	120	5%
<b>Yountville</b>		1,250	1,280	30	2%	1,050	1,110	60	6%
<b>Napa County Unincorporated</b>		12,280	13,020	740	6%	9,580	10,880	1,300	14%

### San Francisco County

Jurisdiction or Area Name	Place Type	HOUSING UNITS				HOUSEHOLDS			
		2010	2040	2010-2040	% Growth	2010	2040	2010-2040	% Growth
<b>San Francisco</b>		376,940	469,350	92,410	25%	345,810	447,250	101,440	29%
19th Avenue	Transit Town Center	5,220	11,170	5,950		4,790	10,870	6,070	
Balboa Park	Transit Neighborhood	1,270	3,120	1,850		1,190	3,020	1,830	
Bayview/Hunters Point	Urban Neighborhood	11,610	22,510	10,900		10,470	21,760	11,290	
Shipyard/Candlestick Point									
Downtown-Van Ness-Geary	Regional Center	101,520	128,660	27,140		89,850	121,600	31,750	
Eastern Neighborhoods	Urban Neighborhood	34,270	45,690	11,420		31,650	43,810	12,160	
Market & Octavia	Urban Neighborhood	11,950	18,150	6,210		11,130	17,530	6,410	
Mission Bay	Urban Neighborhood	3,470	6,850	3,380		3,200	6,610	3,410	
Mission-San Jose Corridor	Mixed-Use Corridor	31,230	32,490	1,260		29,360	30,880	1,510	
Port of San Francisco	Mixed-Use Corridor	120	1,950	1,830		110	1,910	1,800	
San Francisco/San Mateo Bi-County Area (with Brisbane)	Transit Neighborhood	1,630	6,880	5,250		1,510	6,720	5,210	
Transbay Terminal	Regional Center	490	5,210	4,720		190	4,990	4,800	
Treasure Island	Transit Town Center	690	7,950	7,270		590	7,740	7,160	

## Household Growth by PDA and Jurisdiction

### San Mateo County

Jurisdiction or Area Name	Place Type	HOUSING UNITS				HOUSEHOLDS			
		2010	2040	2010-2040	% Growth	2010	2040	2010-2040	% Growth
<b>Atherton</b>		2,530	2,750	220	9%	2,330	2,580	250	11%
<b>Belmont</b>		11,030	12,150	1,120	10%	10,580	11,790	1,210	11%
<i>Villages of Belmont</i>	<i>Mixed-Use Corridor</i>	920	1,830	910		890	1,780	900	
<b>Brisbane</b>		1,930	2,180	250	13%	1,820	2,090	270	15%
<i>San Francisco/San Mateo Bi-County Area (with San Francisco)</i>	<i>Suburban Center</i>	0	0	0		0	0	0	
<b>Burlingame</b>		13,030	17,320	4,300	33%	12,360	16,780	4,420	36%
<i>Burlingame El Camino Real</i>	<i>Transit Town Center</i>	7,610	10,870	3,260		7,170	10,530	3,360	
<b>Colma</b>		590	830	240	41%	560	810	240	43%
<b>Daly City</b>		32,590	36,890	4,300	13%	31,090	35,770	4,680	15%
<i>Bayshore</i>	<i>Transit Town Center</i>	1,590	3,580	1,990		1,550	3,510	1,960	
<i>Mission Boulevard</i>	<i>Mixed-Use Corridor</i>	2,270	3,310	1,050		2,070	3,210	1,140	
<b>East Palo Alto</b>		7,820	8,670	860	11%	6,940	8,340	1,400	20%
<i>Ravenswood</i>	<i>Transit Town Center</i>	1,030	1,880	860		970	1,830	860	
<b>Foster City</b>		12,460	13,350	890	7%	12,020	12,940	920	8%
<b>Half Moon Bay</b>		4,400	4,660	260	6%	4,150	4,410	260	6%
<b>Hillsborough</b>		3,910	4,230	310	8%	3,690	4,010	320	9%
<b>Menlo Park</b>		13,090	15,080	1,990	15%	12,350	14,510	2,160	17%
<i>El Camino Real Corridor and Downtown</i>	<i>Transit Town Center</i>	1,130	2,050	910		1,010	1,980	970	
<b>Millbrae</b>		8,370	11,390	3,020	36%	7,990	11,050	3,060	38%
<i>Transit Station Area</i>	<i>Mixed-Use Corridor</i>	280	2,710	2,420		270	2,650	2,380	
<b>Pacifica</b>		14,520	15,120	600	4%	13,970	14,640	670	5%
<b>Portola Valley</b>		1,900	2,020	130	7%	1,750	1,900	150	9%
<b>Redwood City</b>		29,170	37,880	8,720	30%	27,960	36,850	8,890	32%
<i>Downtown</i>	<i>City Center</i>	1,060	6,300	5,240		990	6,180	5,190	
<i>Broadway/Veterans Boulevard Corridor</i>	<i>Mixed-Use Corridor</i>	770	2,300	1,530		730	2,250	1,520	
<b>San Bruno</b>		15,360	19,820	4,460	29%	14,700	19,170	4,470	30%
<i>Transit Corridors</i>	<i>Mixed-Use Corridor</i>	4,330	7,660	3,330		4,140	7,450	3,310	
<b>San Carlos</b>		12,020	13,800	1,780	15%	11,520	13,390	1,860	16%
<i>Railroad Corridor</i>	<i>Transit Town Center</i>	460	1,230	770		440	1,200	760	
<b>San Mateo</b>		40,010	50,180	10,160	25%	38,230	48,600	10,370	27%
<i>Downtown</i>	<i>City Center</i>	540	1,610	1,070		500	1,560	1,060	
<i>El Camino Real</i>	<i>Mixed-Use Corridor</i>	880	2,080	1,200		840	2,030	1,200	
<i>Rail Corridor</i>	<i>Transit Neighborhood</i>	520	5,540	5,030		500	5,440	4,940	
<b>South San Francisco</b>		21,810	28,730	6,920	32%	20,940	27,900	6,960	33%
<i>Downtown</i>	<i>Transit Town Center</i>	1,590	4,700	3,120		1,510	4,590	3,090	
<b>Woodside</b>		2,160	2,250	90	4%	1,980	2,080	100	5%
<b>San Mateo County Unincorporated</b>		22,350	27,440	5,080	23%	20,910	26,130	5,220	25%
<b>City County Association of Governments of San Mateo County</b>									
<i>El Camino Real</i>	<i>Mixed-Use Corridor</i>	2,840	6,530	3,690		2,610	6,360	3,740	

## Household Growth by PDA and Jurisdiction

### Santa Clara County

Jurisdiction or Area Name	Place Type	HOUSING UNITS				HOUSEHOLDS			
		2010	2040	2010-2040	% Growth	2010	2040	2010-2040	% Growth
<b>Campbell</b>		<b>16,950</b>	<b>19,990</b>	<b>3,040</b>	<b>18%</b>	<b>16,160</b>	<b>19,430</b>	<b>3,270</b>	<b>20%</b>
Central Redevelopment Area	Transit Neighborhood	1,340	2,820	1,470		1,260	2,750	1,490	
<b>Cupertino</b>		<b>21,030</b>	<b>25,820</b>	<b>4,790</b>	<b>23%</b>	<b>20,180</b>	<b>25,050</b>	<b>4,870</b>	<b>24%</b>
<b>Gilroy</b>		<b>14,850</b>	<b>17,570</b>	<b>2,710</b>	<b>18%</b>	<b>14,180</b>	<b>17,040</b>	<b>2,860</b>	<b>20%</b>
Downtown	Transit Town Center	980	2,900	1,930		880	2,820	1,940	
<b>Los Altos</b>		<b>11,200</b>	<b>12,300</b>	<b>1,100</b>	<b>10%</b>	<b>10,750</b>	<b>11,840</b>	<b>1,100</b>	<b>10%</b>
<b>Los Altos Hills</b>		<b>3,000</b>	<b>3,100</b>	<b>100</b>	<b>3%</b>	<b>2,830</b>	<b>2,940</b>	<b>110</b>	<b>4%</b>
<b>Los Gatos</b>		<b>13,050</b>	<b>13,820</b>	<b>770</b>	<b>6%</b>	<b>12,360</b>	<b>13,220</b>	<b>860</b>	<b>7%</b>
<b>Milpitas</b>		<b>19,810</b>	<b>32,430</b>	<b>12,620</b>	<b>64%</b>	<b>19,180</b>	<b>31,680</b>	<b>12,500</b>	<b>65%</b>
Transit Area	Suburban Center	790	7,870	7,080		750	7,720	6,970	
<b>Monte Sereno</b>		<b>1,290</b>	<b>1,370</b>	<b>80</b>	<b>6%</b>	<b>1,210</b>	<b>1,290</b>	<b>80</b>	<b>7%</b>
<b>Morgan Hill</b>		<b>12,860</b>	<b>16,690</b>	<b>3,830</b>	<b>30%</b>	<b>12,310</b>	<b>16,150</b>	<b>3,820</b>	<b>31%</b>
Downtown	Transit Town Center	570	1,990	1,420		510	1,930	1,420	
<b>Mountain View</b>		<b>33,880</b>	<b>43,270</b>	<b>9,390</b>	<b>28%</b>	<b>31,960</b>	<b>41,790</b>	<b>9,830</b>	<b>31%</b>
Downtown	Transit Town Center	5,240	6,390	1,150		4,790	6,030	1,240	
El Camino Real Corridor	Mixed-Use Corridor	9,190	11,150	1,960		8,740	10,830	2,090	
North Bayshore	Suburban Center	360	1,790	1,420		350	1,750	1,410	
San Antonio Center	Transit Town Center	3,590	6,350	2,760		3,420	6,180	2,770	
Whisman Station	Transit Neighborhood	670	1,670	1,010		650	1,640	990	
<b>Palo Alto</b>		<b>28,220</b>	<b>35,620</b>	<b>7,410</b>	<b>26%</b>	<b>26,490</b>	<b>34,360</b>	<b>7,870</b>	<b>30%</b>
California Avenue	Transit Neighborhood	800	1,650	850		750	1,600	850	
<b>San Jose</b>		<b>314,040</b>	<b>443,210</b>	<b>129,170</b>	<b>41%</b>	<b>301,370</b>	<b>431,910</b>	<b>130,550</b>	<b>43%</b>
Bascom TOD Corridor	Mixed-Use Corridor	680	2,240	1,560		650	2,190	1,540	
Bascom Urban Village	Mixed-Use Corridor	1,780	2,590	810		1,670	2,520	850	
Berryessa Station	Transit Neighborhood	1,880	7,990	6,110		1,850	7,850	6,000	
Blossom Hill/Snell Urban Village	Mixed-Use Corridor	640	1,720	1,080		610	1,680	1,070	
Camden Urban Village	Mixed-Use Corridor	490	1,480	1,000		480	1,460	980	
Capitol Corridor Urban Villages	Mixed-Use Corridor	860	7,100	6,240		820	6,960	6,140	
Capitol/Tully/King Urban Villages	Suburban Center	1,090	3,340	2,250		1,060	3,270	2,210	
Communications Hill	Transit Town Center	6,810	10,140	3,340		6,540	9,910	3,360	
Cottle Transit Village	Suburban Center	0	3,580	3,580		0	3,510	3,510	
Downtown "Frame"	City Center	18,120	28,210	10,090		16,980	27,410	10,440	
East Santa Clara/Alum Rock Corridor	Mixed-Use Corridor	7,180	13,370	6,200		6,750	12,980	6,230	
Greater Downtown	Regional Center	4,590	19,750	15,150		3,670	19,310	15,640	
North San Jose	Regional Center	10,880	43,730	32,850		10,420	42,820	32,400	
Oakridge/Almaden Plaza Urban Village	Suburban Center	1,910	9,200	7,300		1,790	9,020	7,240	
Saratoga TOD Corridor	Mixed-Use Corridor	2,430	3,550	1,120		2,340	3,460	1,130	
Stevens Creek TOD Corridor	Mixed-Use Corridor	2,620	7,800	5,170		2,500	7,620	5,120	
West San Carlos & Southwest Expressway Corridors	Mixed-Use Corridor	11,150	20,960	9,810		10,320	20,410	10,100	
Westgate/El Paseo Urban Village	Suburban Center	850	3,340	2,490		800	3,270	2,480	
Winchester Boulevard TOD Corridor	Mixed-Use Corridor	4,850	6,850	2,000		4,630	6,690	2,050	
<b>Santa Clara</b>		<b>45,150</b>	<b>58,920</b>	<b>13,770</b>	<b>30%</b>	<b>43,020</b>	<b>57,240</b>	<b>14,220</b>	<b>33%</b>
El Camino Real Focus Area	Mixed-Use Corridor	1,840	5,400	3,560		1,650	5,220	3,580	
Santa Clara Station Focus Area	City Center	480	3,880	3,410		450	3,800	3,350	
<b>Saratoga</b>		<b>11,120</b>	<b>11,750</b>	<b>630</b>	<b>6%</b>	<b>10,730</b>	<b>11,350</b>	<b>620</b>	<b>6%</b>
<b>Sunnyvale</b>		<b>55,790</b>	<b>74,780</b>	<b>18,990</b>	<b>34%</b>	<b>53,380</b>	<b>72,760</b>	<b>19,380</b>	<b>36%</b>
Downtown & Caltrain Station	Transit Town Center	1,840	3,810	1,980		1,730	3,710	1,980	
East Sunnyvale	Urban Neighborhood	1,020	4,270	3,260		950	4,170	3,220	
El Camino Real Corridor	Mixed-Use Corridor	10,990	15,400	4,410		10,350	14,940	4,590	
Lawrence Station Transit Village	Transit Neighborhood	1,660	5,210	3,550		1,560	5,100	3,540	
Tasman Station ITR	Mixed-Use Corridor	1,440	3,270	1,830		1,390	3,200	1,810	
<b>Santa Clara County Unincorporated</b>		<b>29,690</b>	<b>32,490</b>	<b>2,800</b>	<b>9%</b>	<b>28,080</b>	<b>31,060</b>	<b>2,980</b>	<b>11%</b>
<b>Valley Transportation Authority</b>									
Cores, Corridors, and Station Areas	Mixed-Use Corridor	48,380	67,690	19,300		46,070	65,750	19,680	

## Household Growth by PDA and Jurisdiction

### Solano County

Jurisdiction or Area Name	Place Type	HOUSING UNITS				HOUSEHOLDS			
		2010	2040	2010-2040	% Growth	2010	2040	2010-2040	% Growth
<b>Benicia</b>		<b>11,310</b>	<b>12,680</b>	<b>1,380</b>	<b>12%</b>	<b>10,690</b>	<b>12,240</b>	<b>1,560</b>	<b>15%</b>
Downtown	Transit Neighborhood	600	1,530	930		530	1,480	950	
<b>Dixon</b>		<b>6,170</b>	<b>6,660</b>	<b>480</b>	<b>8%</b>	<b>5,860</b>	<b>6,430</b>	<b>570</b>	<b>10%</b>
Downtown	Transit Town Center	740	990	250		690	960	270	
<b>Fairfield</b>		<b>37,180</b>	<b>48,280</b>	<b>11,100</b>	<b>30%</b>	<b>34,480</b>	<b>46,410</b>	<b>11,930</b>	<b>35%</b>
Downtown South (Jefferson Street)	Suburban Center	680	1,100	420		600	1,060	460	
Fairfield-Vacaville Train Station	Transit Town Center	410	6,450	6,040		90	6,050	5,960	
North Texas Street Core	Mixed-Use Corridor	1,770	3,470	1,700		1,600	3,370	1,770	
West Texas Street Gateway	Mixed-Use Corridor	1,120	3,550	2,430		1,020	3,450	2,440	
<b>Rio Vista</b>		<b>3,890</b>	<b>4,260</b>	<b>370</b>	<b>10%</b>	<b>3,450</b>	<b>3,950</b>	<b>500</b>	<b>14%</b>
<b>Suisun City</b>		<b>9,450</b>	<b>10,820</b>	<b>1,360</b>	<b>14%</b>	<b>8,920</b>	<b>10,490</b>	<b>1,570</b>	<b>18%</b>
Downtown & Waterfront	Transit Town Center	1,180	2,230	1,040		1,090	2,160	1,060	
<b>Vacaville</b>		<b>32,810</b>	<b>36,910</b>	<b>4,100</b>	<b>12%</b>	<b>31,090</b>	<b>35,860</b>	<b>4,770</b>	<b>15%</b>
Allison Area	Suburban Center	610	700	100		550	690	130	
Downtown	Transit Town Center	250	940	690		220	920	690	
<b>Vallejo</b>		<b>44,430</b>	<b>46,960</b>	<b>2,530</b>	<b>6%</b>	<b>40,560</b>	<b>44,880</b>	<b>4,320</b>	<b>11%</b>
Waterfront & Downtown	Suburban Center	1,130	1,970	840		980	1,920	950	
<b>Solano County Unincorporated</b>		<b>7,450</b>	<b>8,940</b>	<b>1,500</b>	<b>20%</b>	<b>6,710</b>	<b>8,390</b>	<b>1,680</b>	<b>25%</b>

### Sonoma County

Jurisdiction or Area Name	Place Type	HOUSING UNITS				HOUSEHOLDS			
		2010	2040	2010-2040	% Growth	2010	2040	2010-2040	% Growth
<b>Cloverdale</b>		<b>3,430</b>	<b>4,210</b>	<b>790</b>	<b>23%</b>	<b>3,180</b>	<b>4,040</b>	<b>860</b>	<b>27%</b>
Downtown/SMART Transit Area	Transit Town Center	1,150	1,880	730		1,040	1,800	760	
<b>Cotati</b>		<b>3,140</b>	<b>3,650</b>	<b>510</b>	<b>16%</b>	<b>2,980</b>	<b>3,530</b>	<b>550</b>	<b>18%</b>
Downtown and Cotati Depot	Transit Town Center	890	1,290	400		830	1,250	410	
<b>Healdsburg</b>		<b>4,800</b>	<b>5,000</b>	<b>200</b>	<b>4%</b>	<b>4,390</b>	<b>4,650</b>	<b>260</b>	<b>6%</b>
<b>Petaluma</b>		<b>22,740</b>	<b>25,430</b>	<b>2,690</b>	<b>12%</b>	<b>21,740</b>	<b>24,610</b>	<b>2,880</b>	<b>13%</b>
Central, Turning Basin/Lower Reach	Suburban Center	810	2,570	1,760		750	2,500	1,750	
<b>Rohnert Park</b>		<b>16,550</b>	<b>20,150</b>	<b>3,600</b>	<b>22%</b>	<b>15,810</b>	<b>19,590</b>	<b>3,780</b>	<b>24%</b>
Central Rohnert Park	Transit Town Center	1,360	2,320	960		1,300	2,270	970	
Sonoma Mountain Village	Suburban Center	200	2,210	2,010		200	2,170	1,980	
<b>Santa Rosa</b>		<b>67,400</b>	<b>83,420</b>	<b>16,020</b>	<b>24%</b>	<b>63,590</b>	<b>80,560</b>	<b>16,970</b>	<b>27%</b>
Downtown Station Area	City Center	2,230	6,130	3,890		2,080	5,980	3,900	
Mendocino Avenue/Santa Rosa Avenue Corridor	Mixed-Use Corridor	7,310	9,820	2,510		6,810	9,510	2,700	
North Santa Rosa Station	Suburban Center	4,240	6,200	1,960		3,960	6,040	2,090	
Roseland	Transit Neighborhood	3,570	6,480	2,910		3,400	6,300	2,900	
Sebastopol Road Corridor	Mixed-Use Corridor	2,990	8,280	5,290		2,750	8,050	5,300	
<b>Sebastopol</b>		<b>3,470</b>	<b>3,890</b>	<b>420</b>	<b>12%</b>	<b>3,280</b>	<b>3,710</b>	<b>430</b>	<b>13%</b>
Nexus Area	Transit Town Center	2,510	2,890	390		2,360	2,750	400	
<b>Sonoma</b>		<b>5,540</b>	<b>5,840</b>	<b>300</b>	<b>5%</b>	<b>4,960</b>	<b>5,390</b>	<b>430</b>	<b>9%</b>
<b>Windsor</b>		<b>9,540</b>	<b>11,460</b>	<b>1,910</b>	<b>20%</b>	<b>8,960</b>	<b>10,870</b>	<b>1,910</b>	<b>21%</b>
Redevelopment Area	Suburban Center	1,430	2,640	1,200		1,370	2,550	1,190	
<b>Sonoma County Unincorporated</b>		<b>67,970</b>	<b>73,400</b>	<b>5,430</b>	<b>8%</b>	<b>56,950</b>	<b>63,730</b>	<b>6,780</b>	<b>12%</b>

## APPENDIX C: REFERENCES AND DATA SOURCES

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