



Employment Distribution Patterns and the SCS

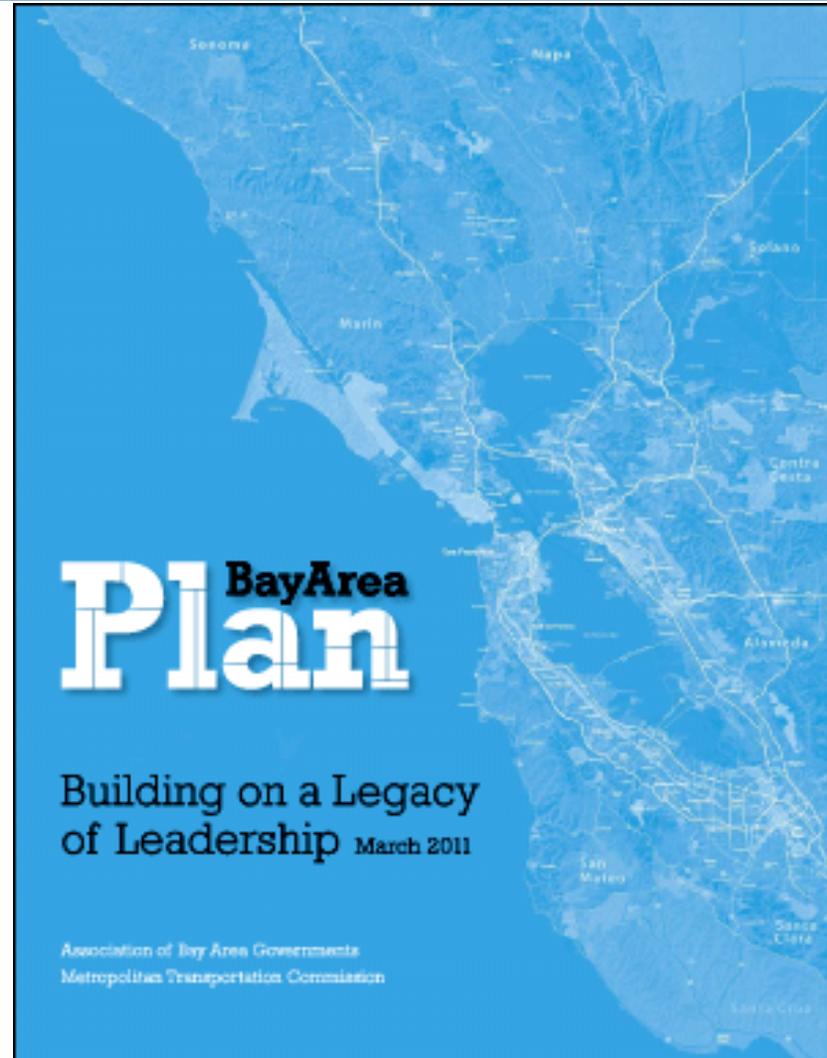
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President, Strategic Economics



ABAG Regional Planning Committee
April 4, 2012

San Francisco Bay Area: Sustainable Communities Strategy

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



Key Themes Linking Employment Growth to the SCS

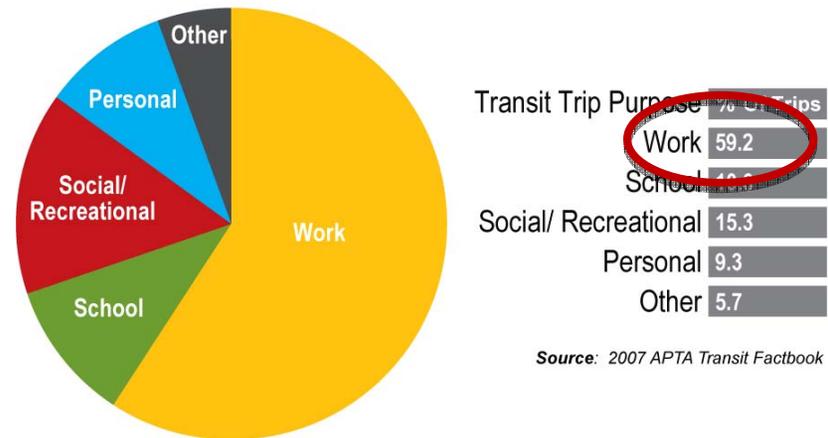
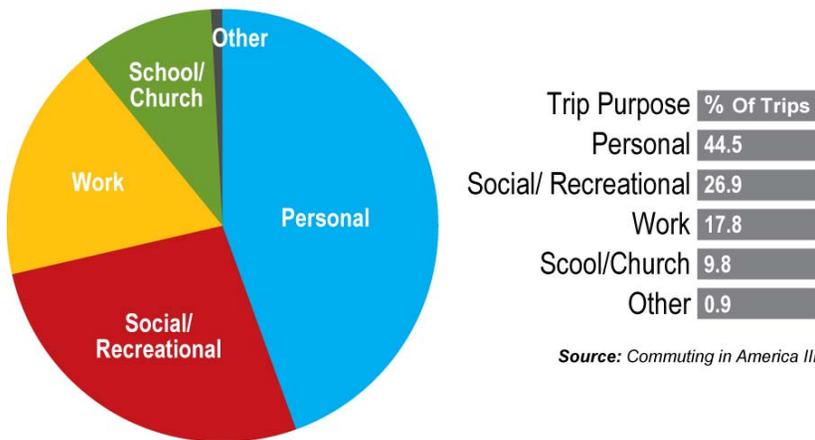


- The spatial pattern of employment growth
- The kinds of economic sectors that are growing and their viability for transit oriented locations
- The integral relationship between the commute trip and transit ridership

Commute Trips are Key to A Viable Transit System

Work Trips are Less than 20% of Total Trips

Work Trips Fundamental to Transit Commute (60%)

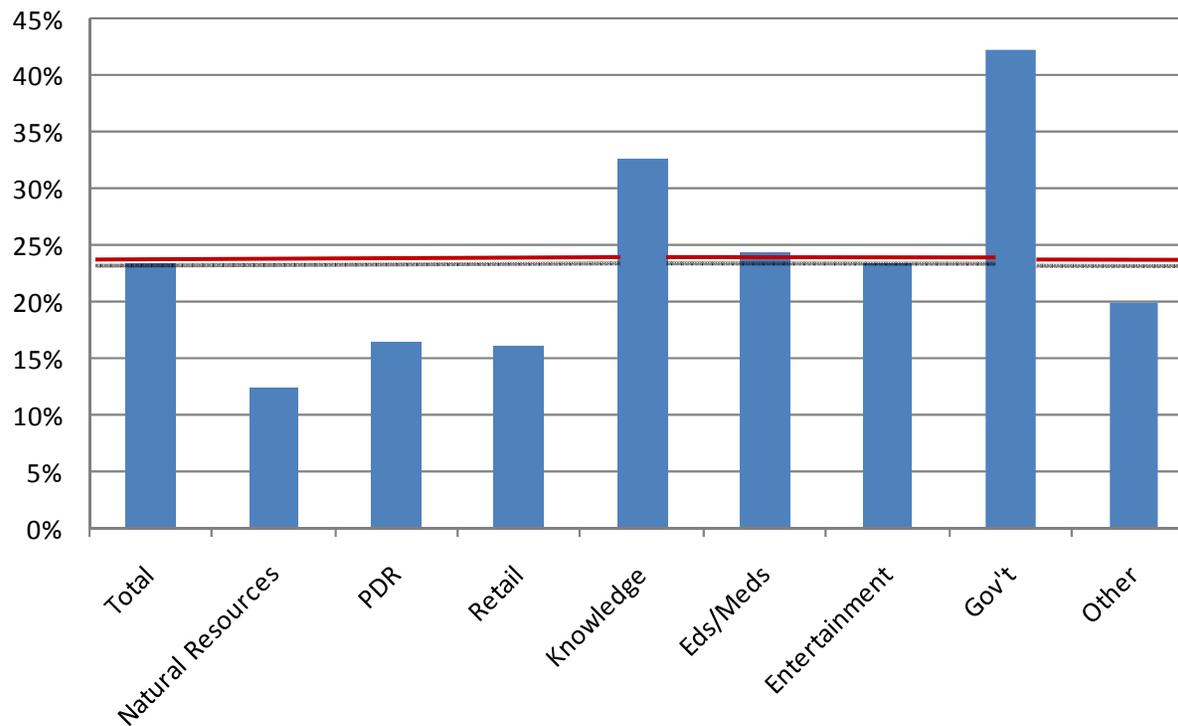


- By a wide margin, the largest group of transit trips are commute trips
- Commuters are key to transit’s productivity

Source: Pisarski, *Commuting in America*

National Profile of Employment Near Transit

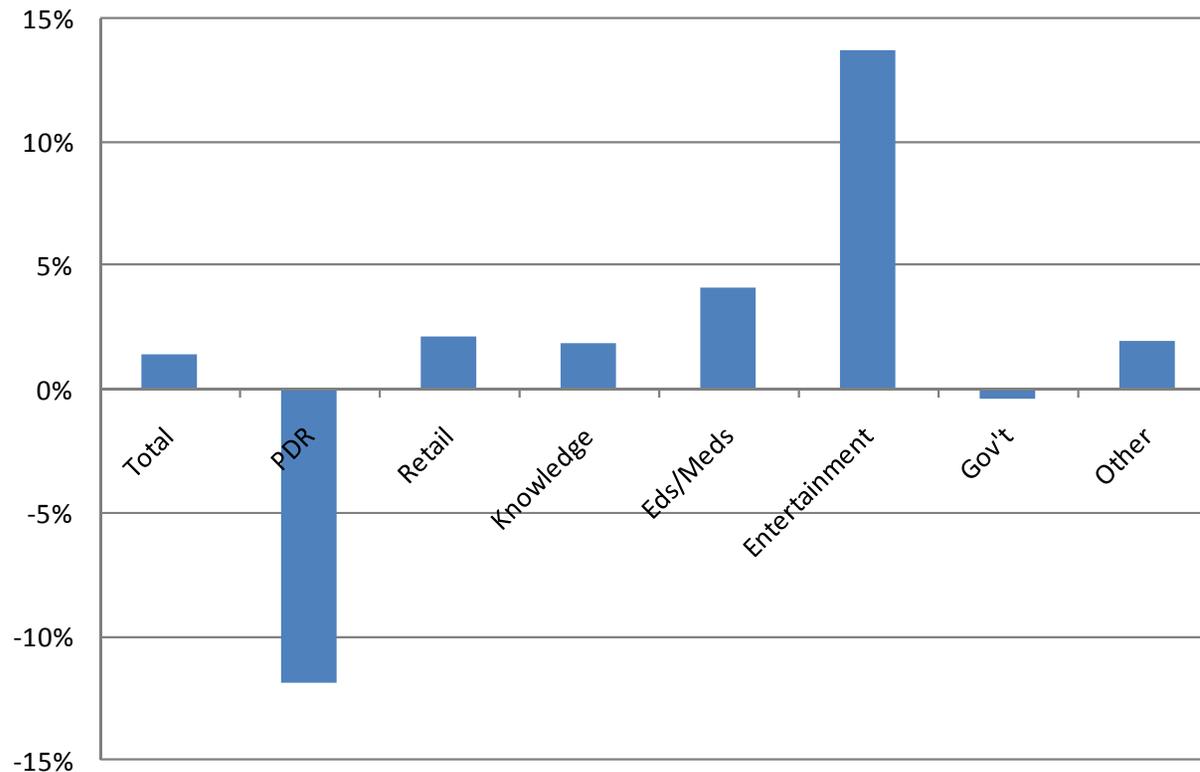
Transit Zone Capture Rate by Sector Group, 2008



Source: LEHD 2008, Center for Transit Oriented Development 2010

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

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



Source: LEHD 2008, Center for Transit Oriented Development 2010

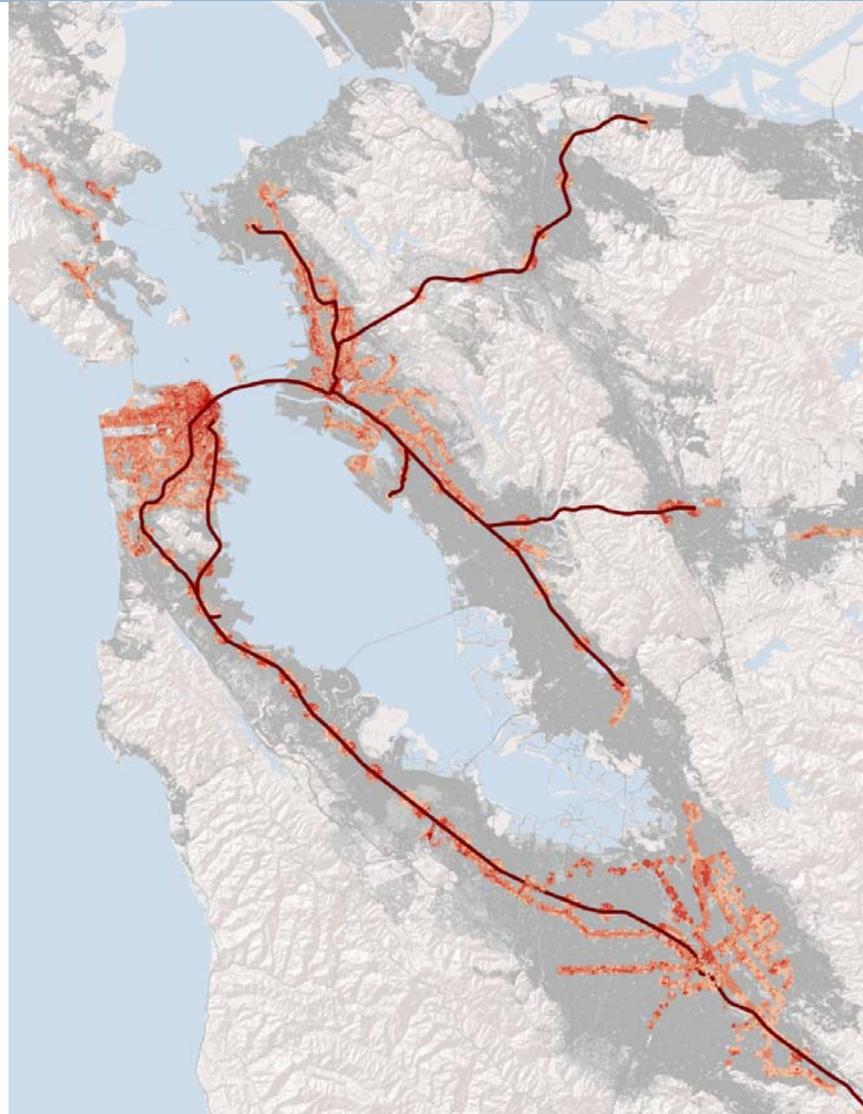
23% of Bay Area Jobs are within a ½ Mile of Regional Transit Stations



Employment Data Source:
National Establishment Time
Series (NETS)

Maps produced by Mark
Shorett, Arup

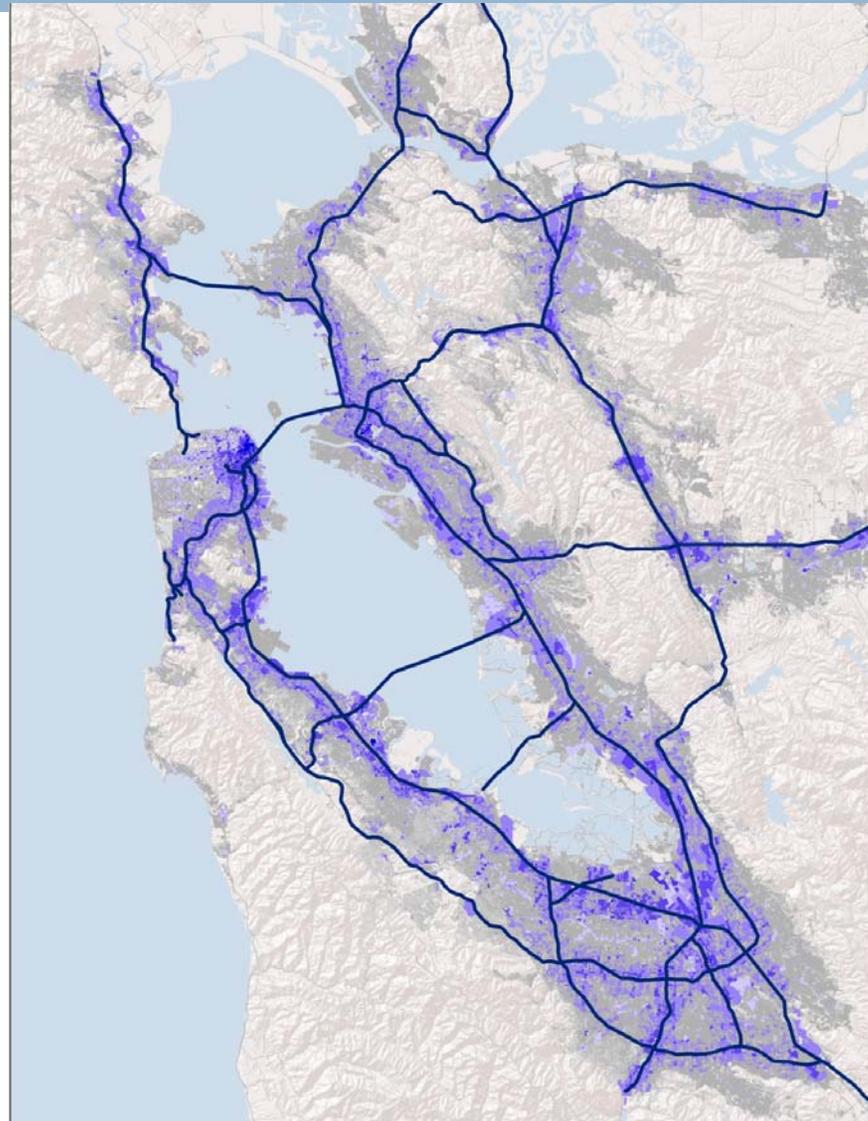
44% of Bay Area Jobs are within a ½ Mile of Regional Transit Stations or ¼ Mile of Frequent Local Bus



Employment Data Source:
National Establishment Time
Series (NETS)

Maps produced by Mark
Shorett, Arup

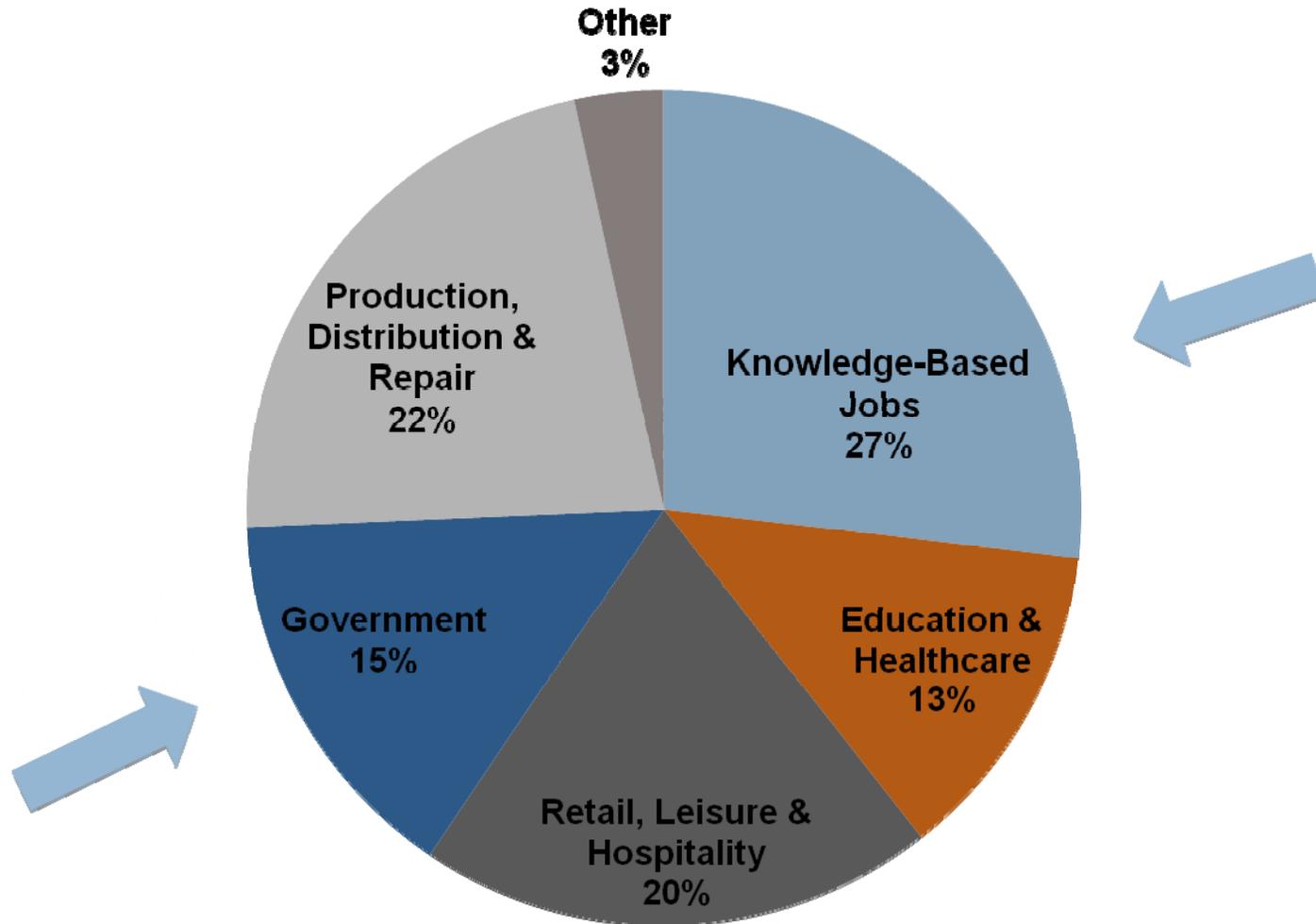
75 % of Bay Area Jobs are within a 1/2 Mile of Highway Off-Ramps



Employment Data Source:
National Establishment Time
Series (NETS)

Maps produced by Mark
Shorett, Arup

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

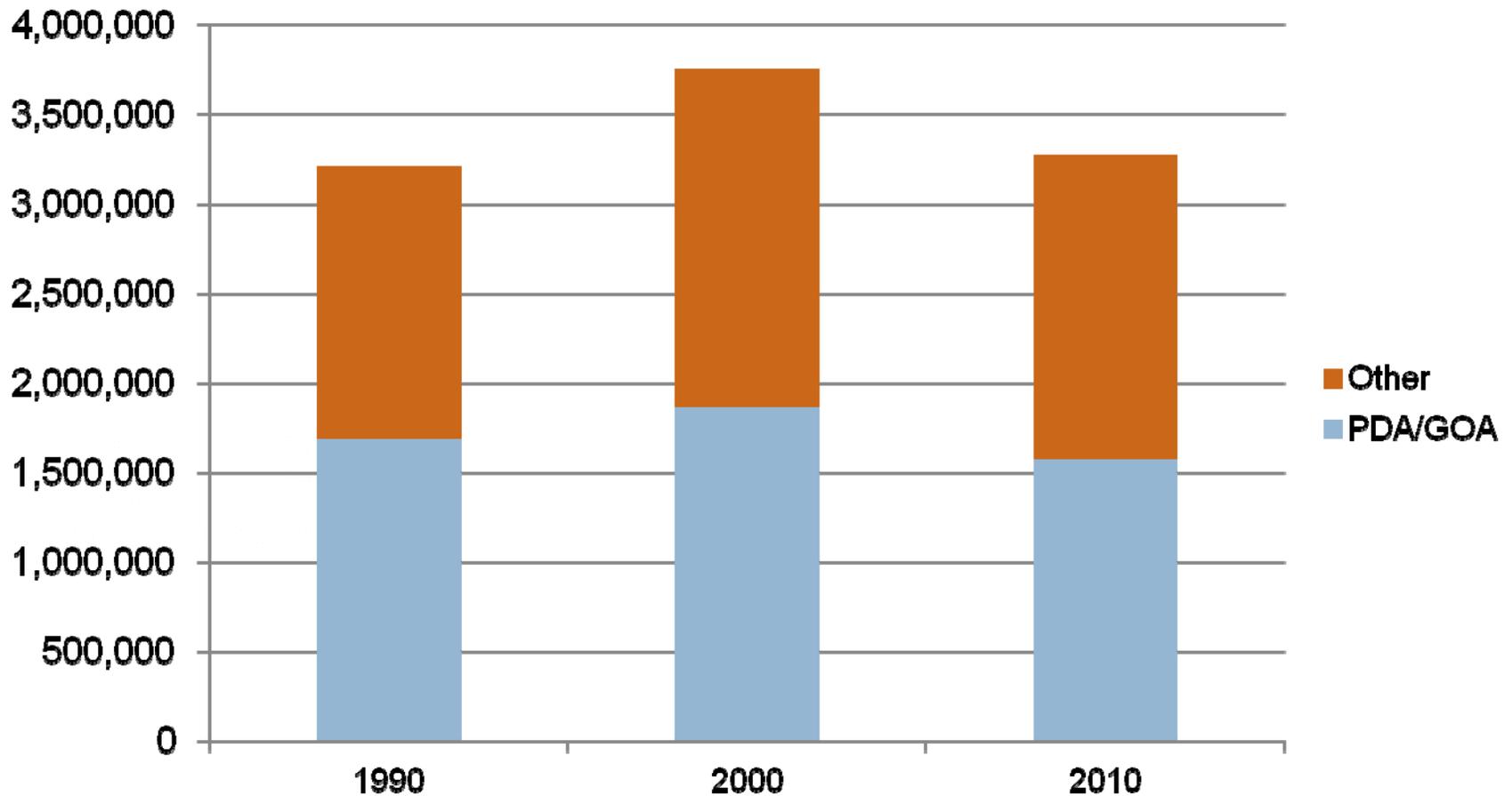


Sources: Caltrans/EDD, Strategic Economics, 2010

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

Total Regional Employment by Location

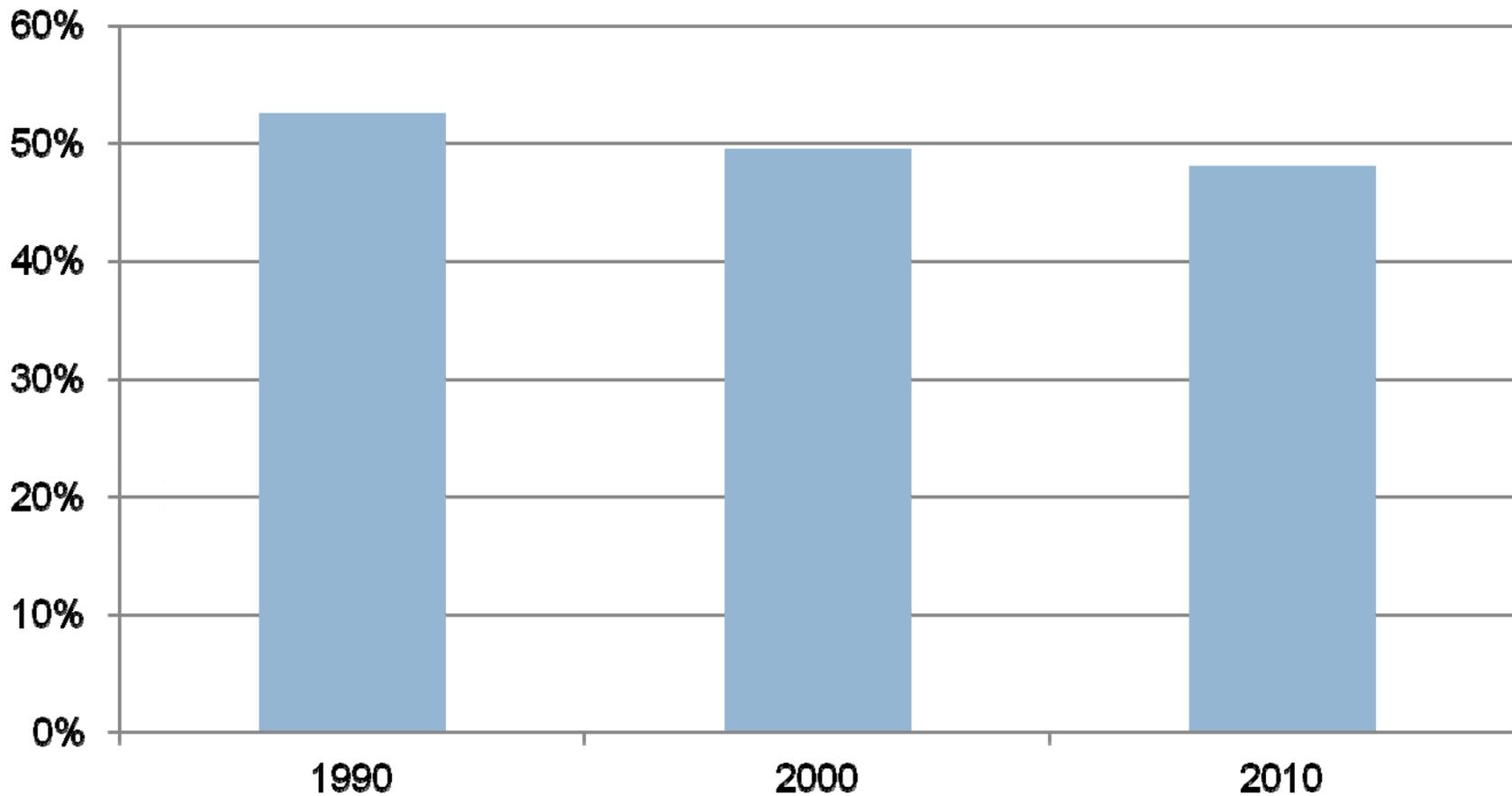
Source: NETS, ABAG, Strategic Economics



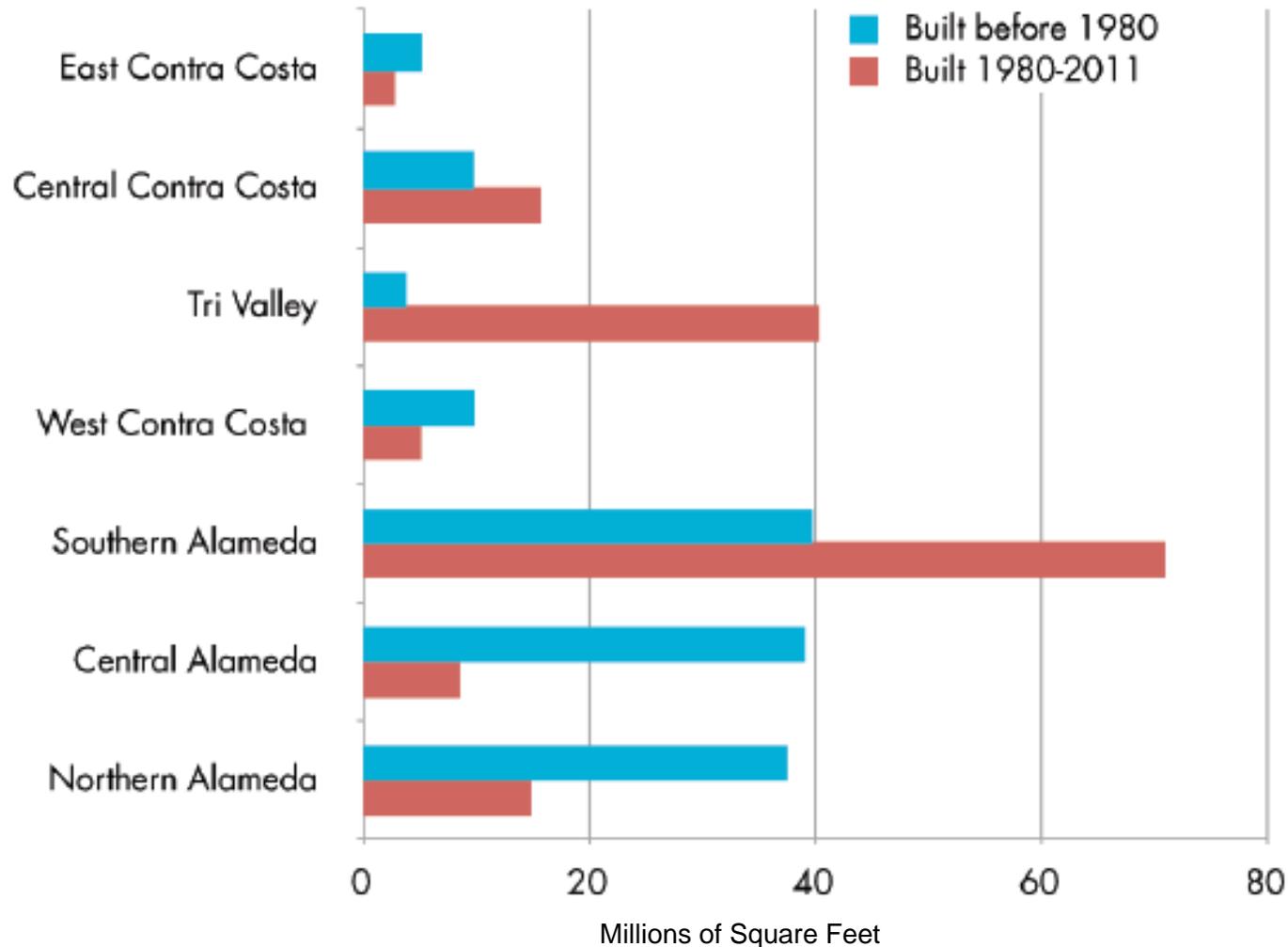
The share of jobs near transit has been consistently declining....

Share of Region's Jobs in PDAs and GOAs

Source: NETS, ABAG, Strategic Economics



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

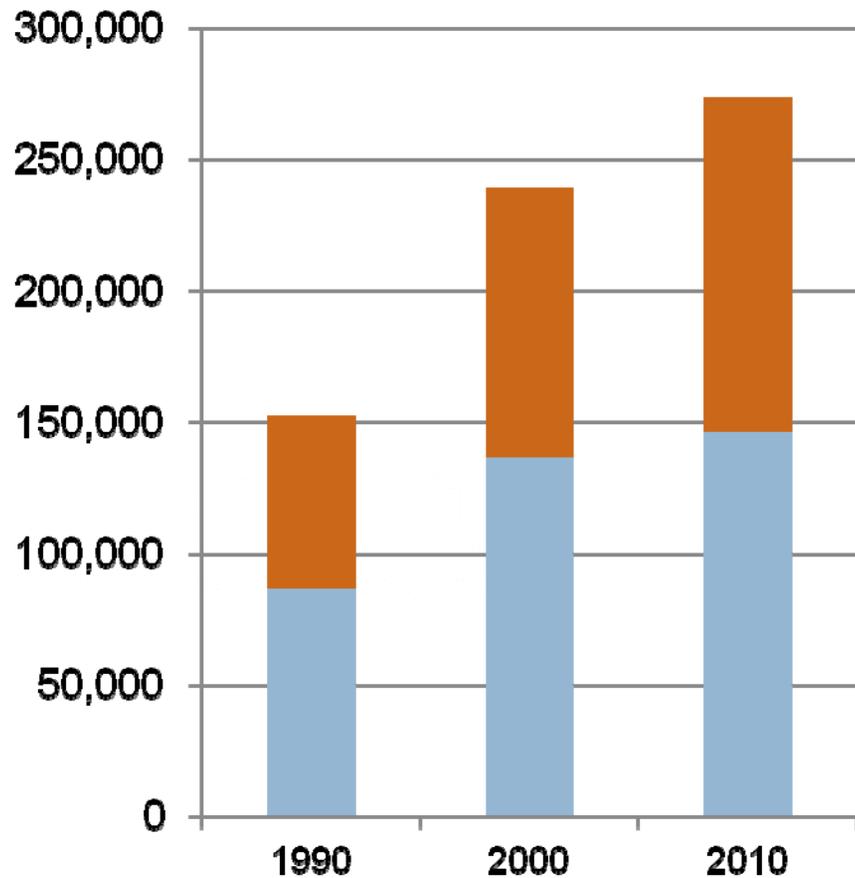


Source: CBRE, 2011; Colliers Parish, 2011; Strategic Economics, 2011

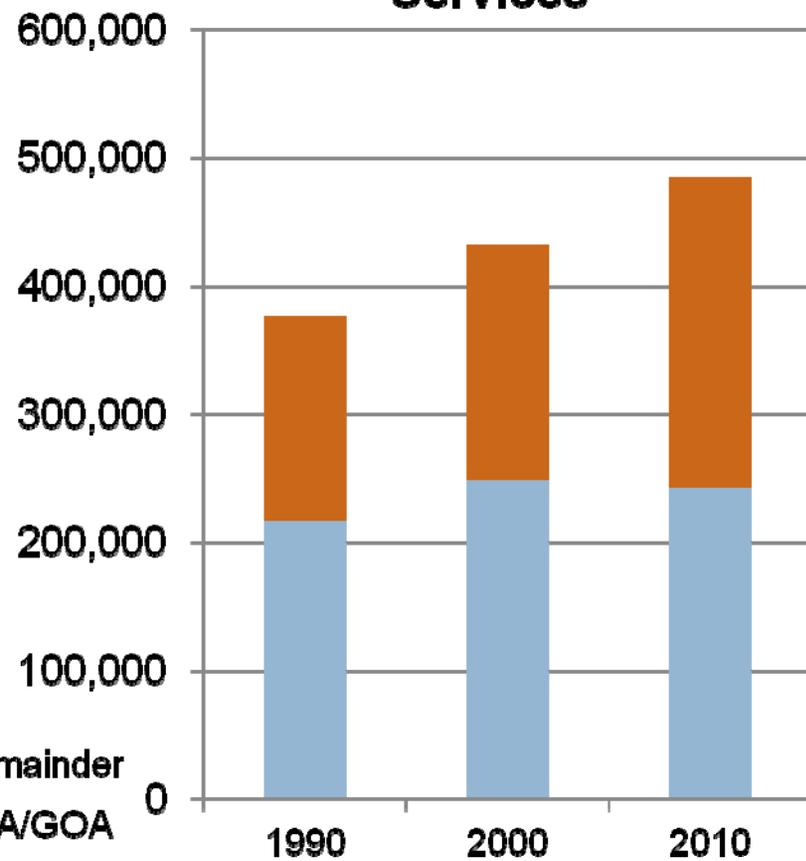
...At same time, “knowledge based” jobs have continued to grow in PDAs



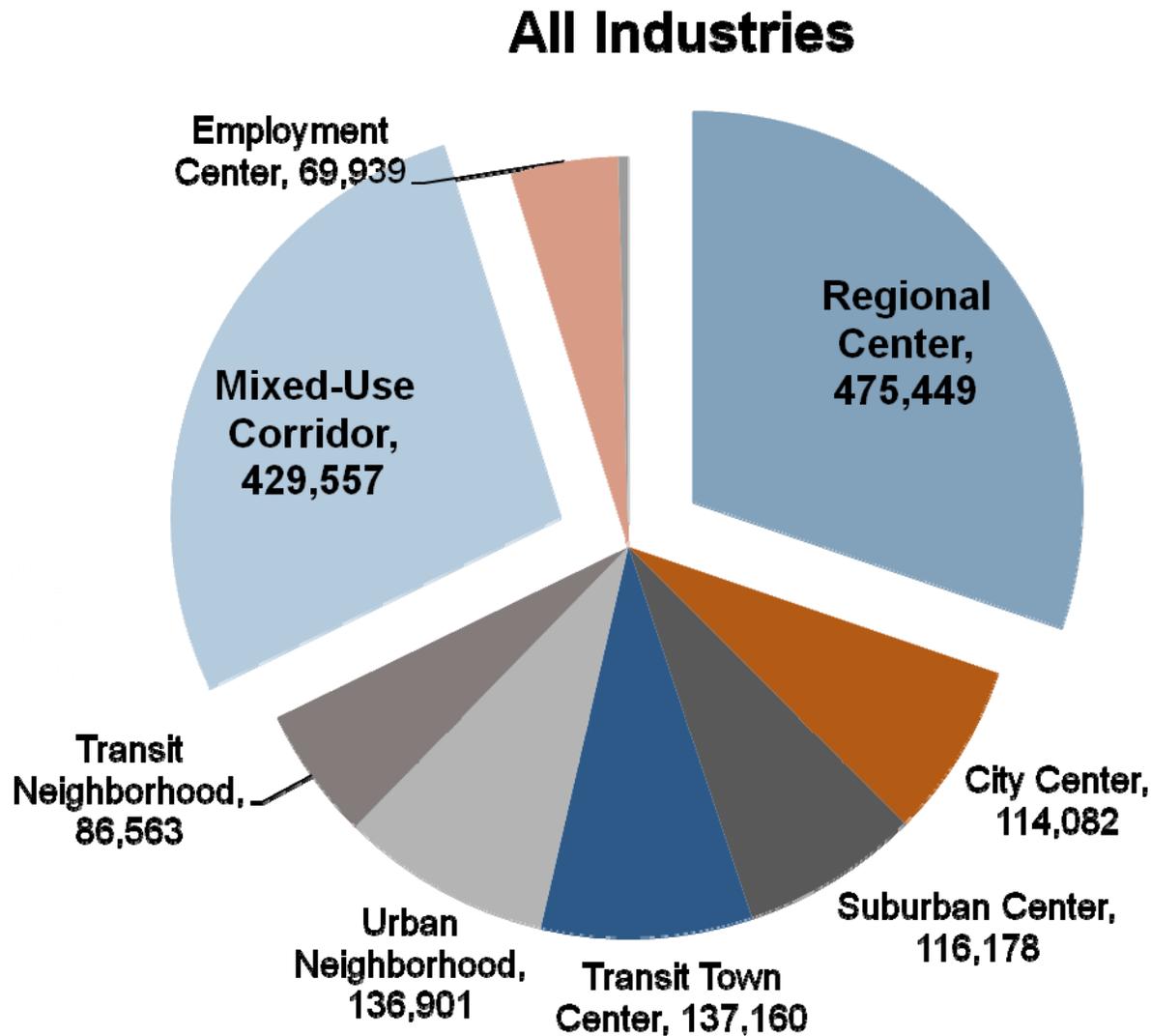
Information



Professional and Business Services



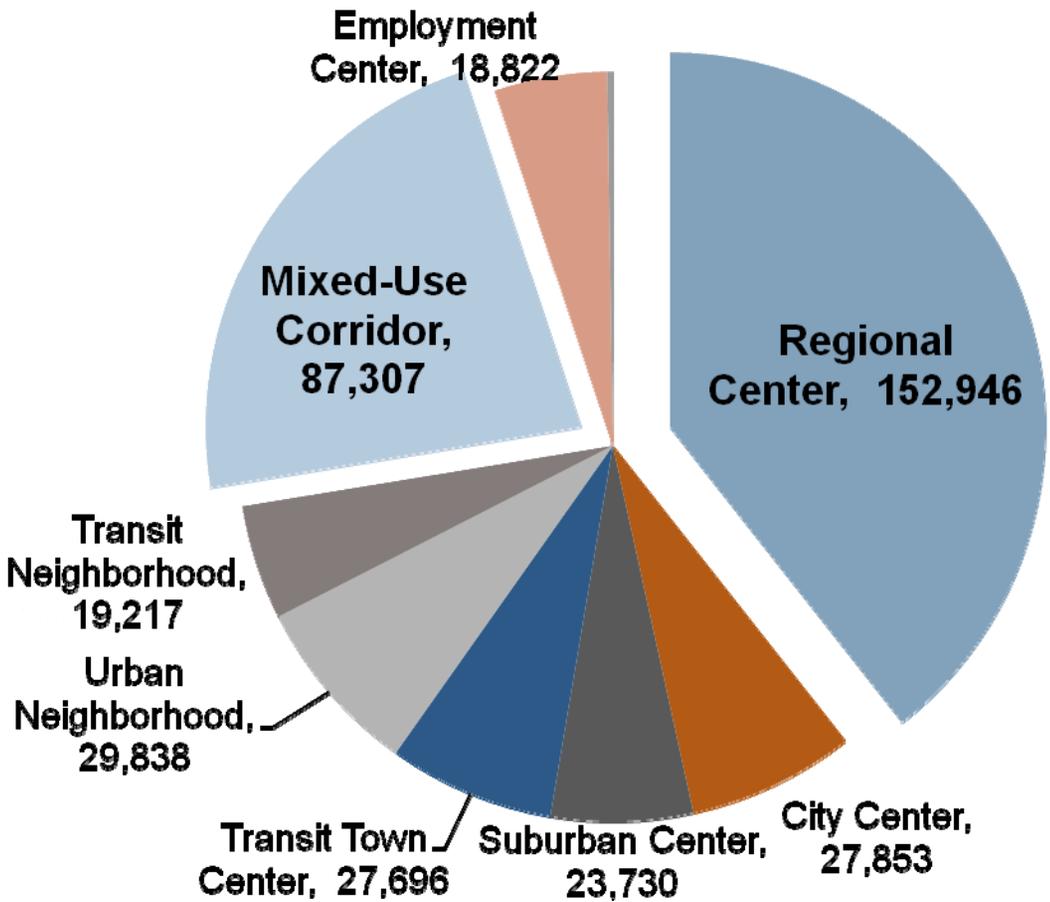
Over half of PDA jobs are in Regional Centers and Mixed-Use Corridors



Source: NETS, 2010;
ABAG, 2011

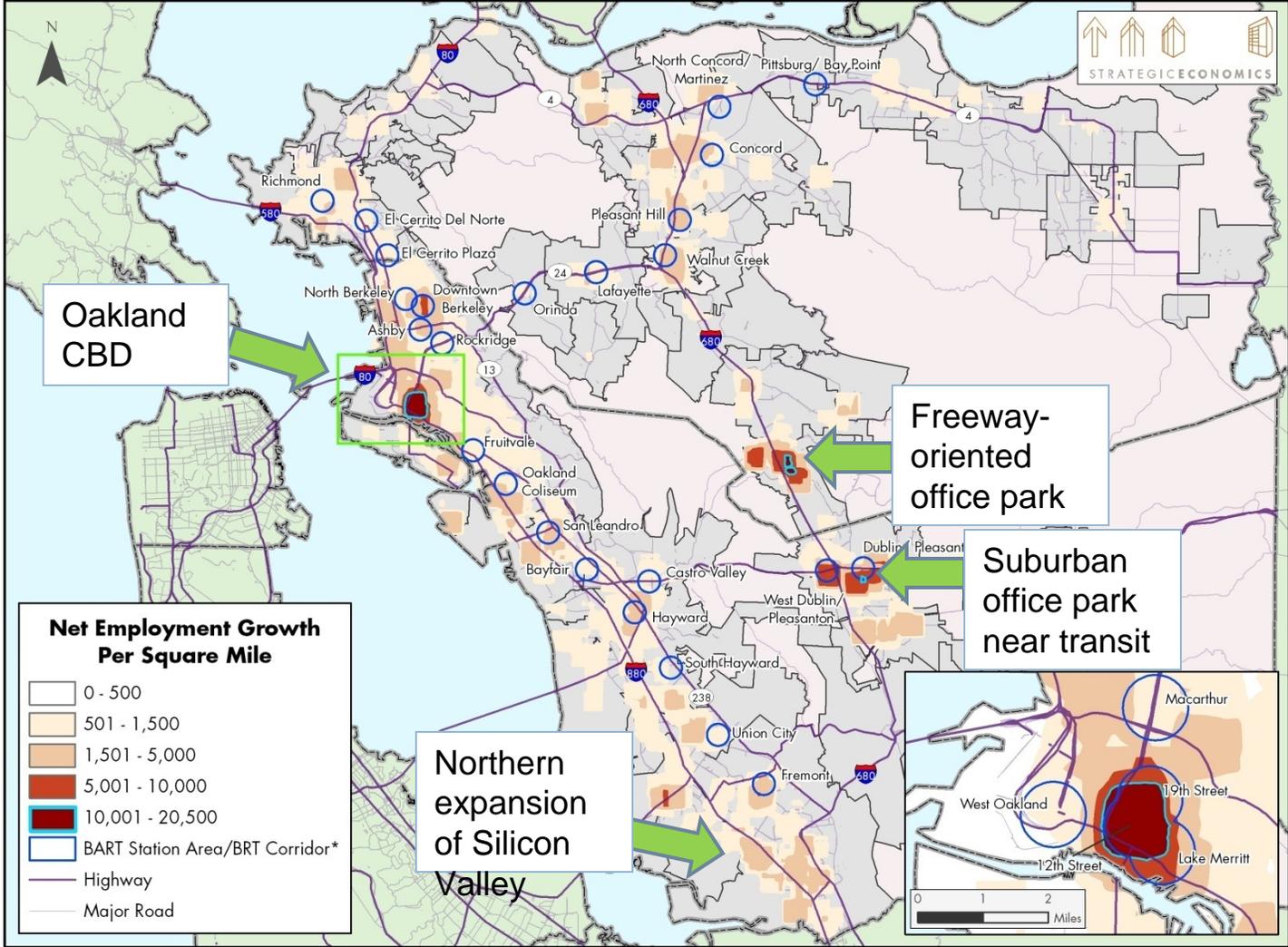
Knowledge Based Jobs Are Clustered in Regional Centers and Mixed-Use Corridors

Information, Prof & Business Services



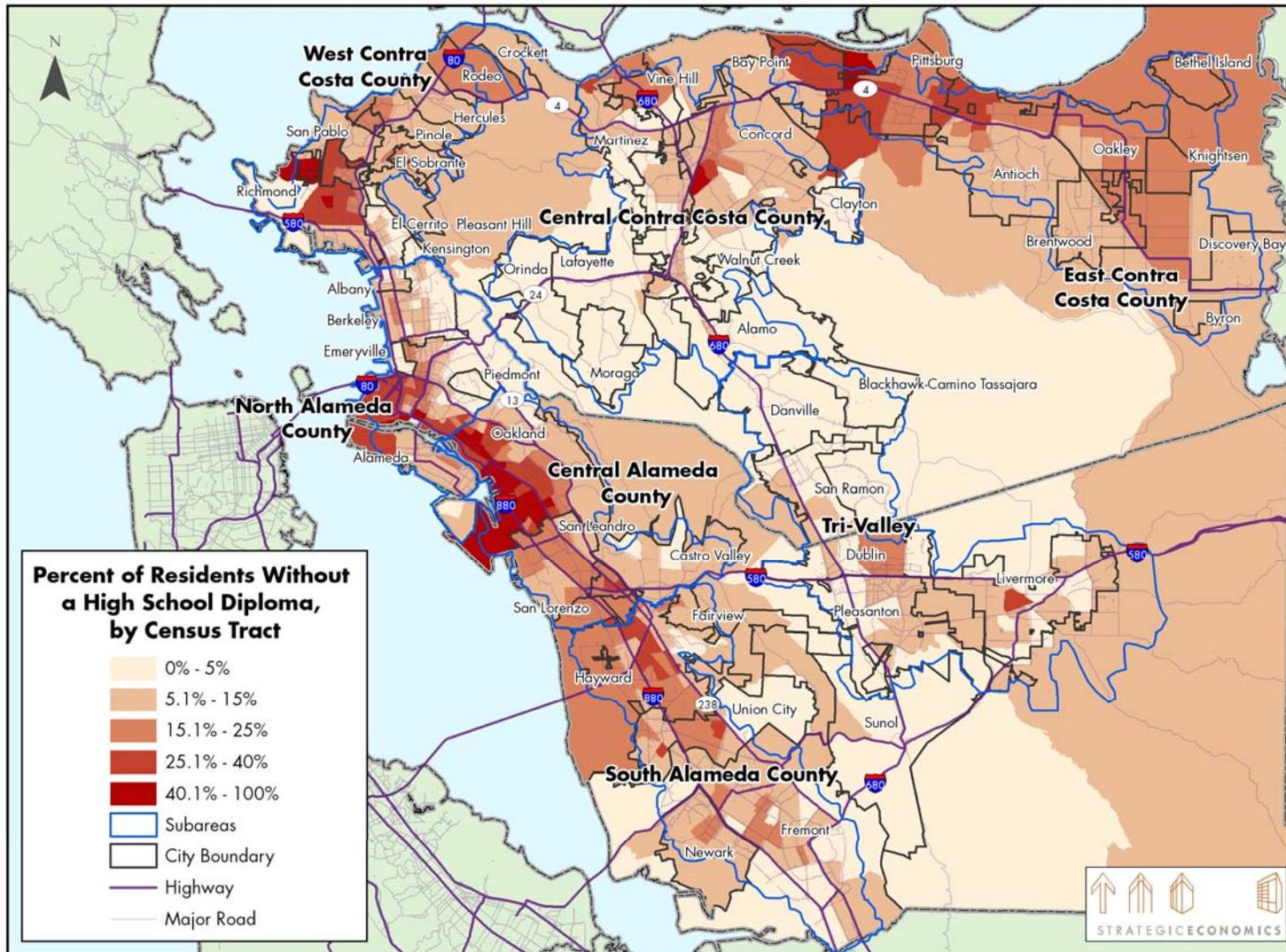
Source: NETS, 2010; ABAG, 2011

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



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

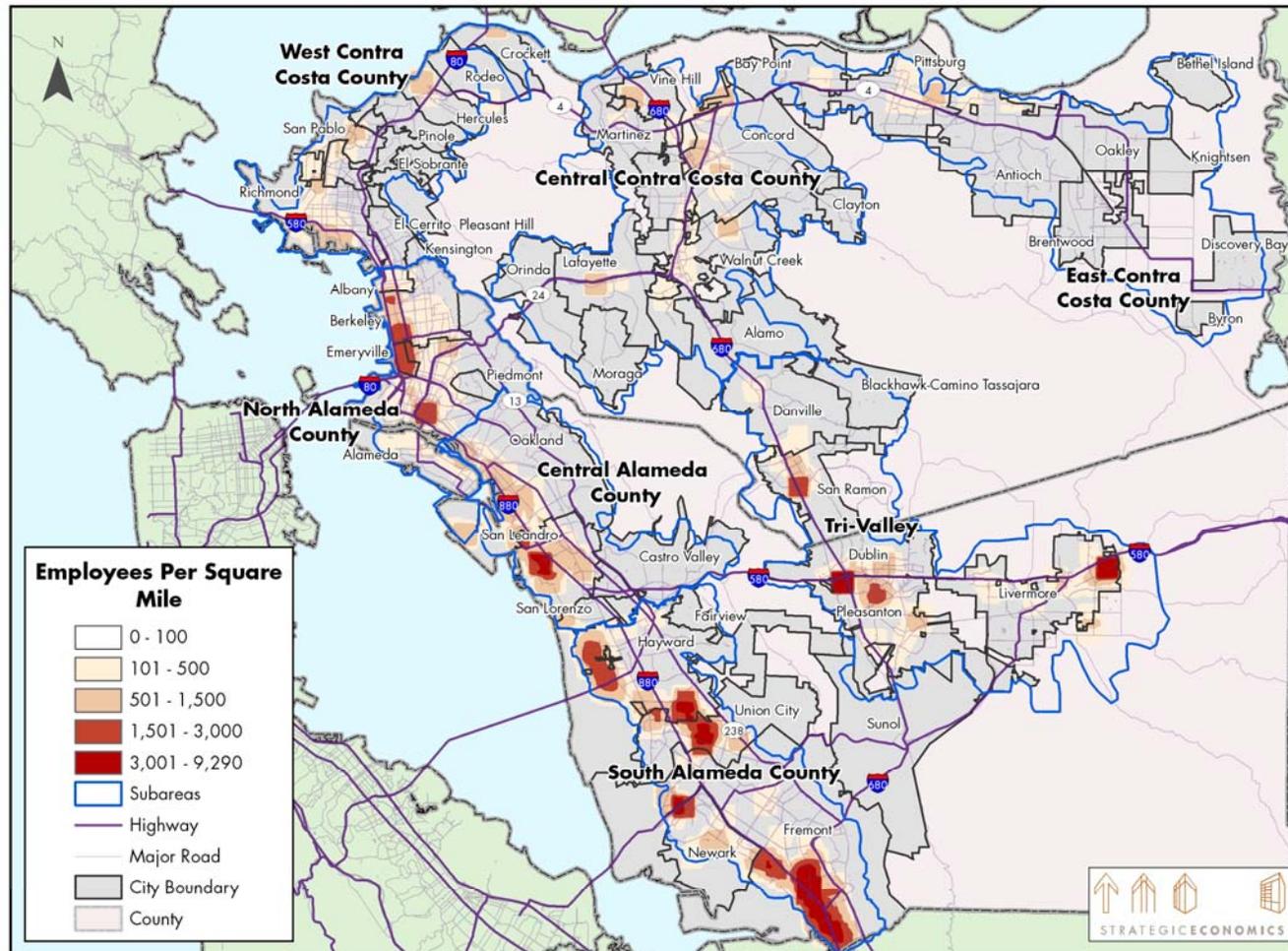
Job Location Also Significant Implications for Work Force Development



Source: Strategic Economics, 2011; US Census American Community Survey Estimates, 2005-2009; ESRI; MTC.

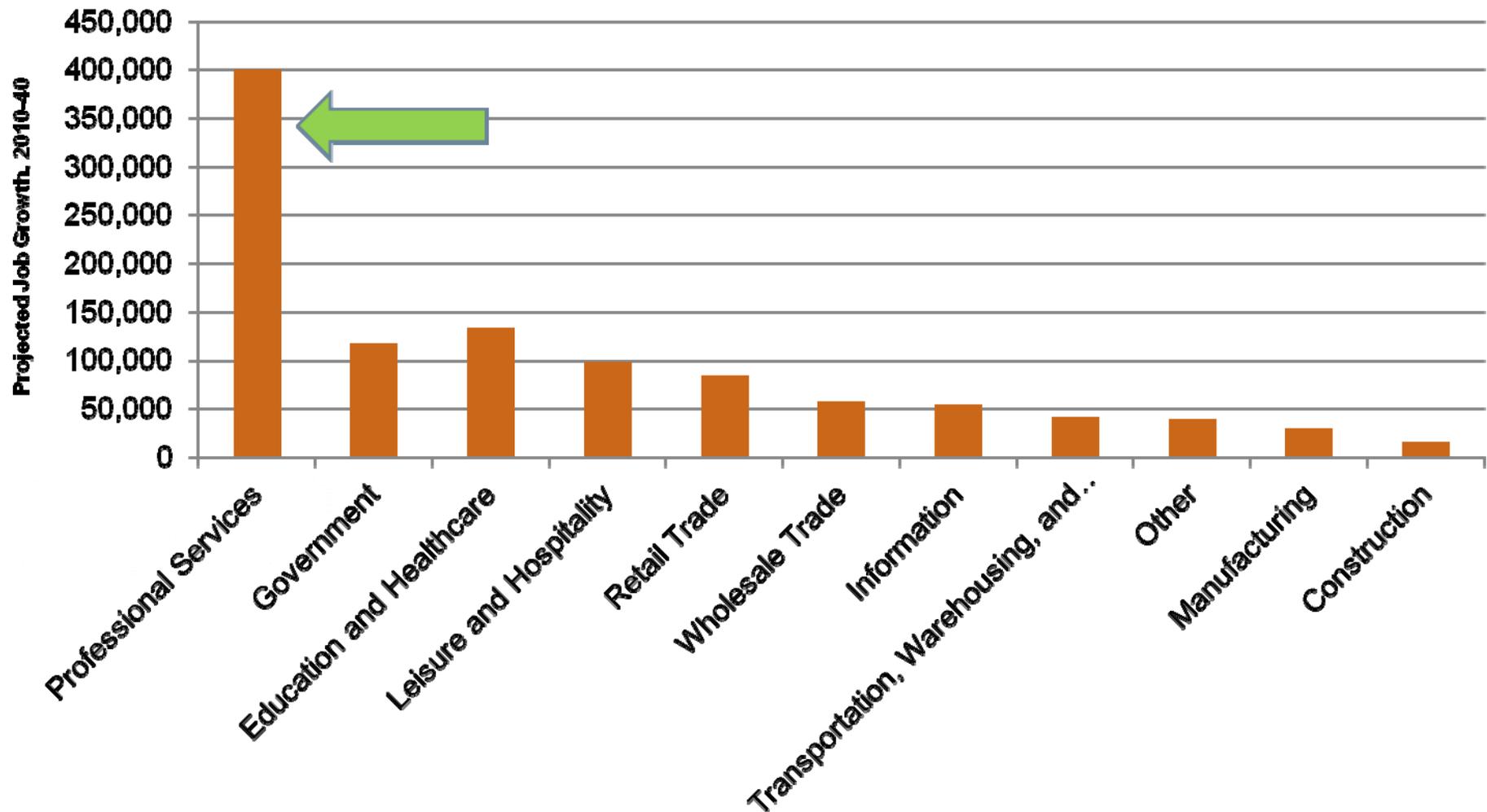
Manufacturing Remains an Important Sector, Especially in the East Bay, Need to Focus on More than Just the Knowledge Based Sectors

East Bay Manufacturing Employment Density, 2009



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

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



Source: Caltrans, 2010.

But, There Are Future Challenges:



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