



PLAN BAY AREA 2050+



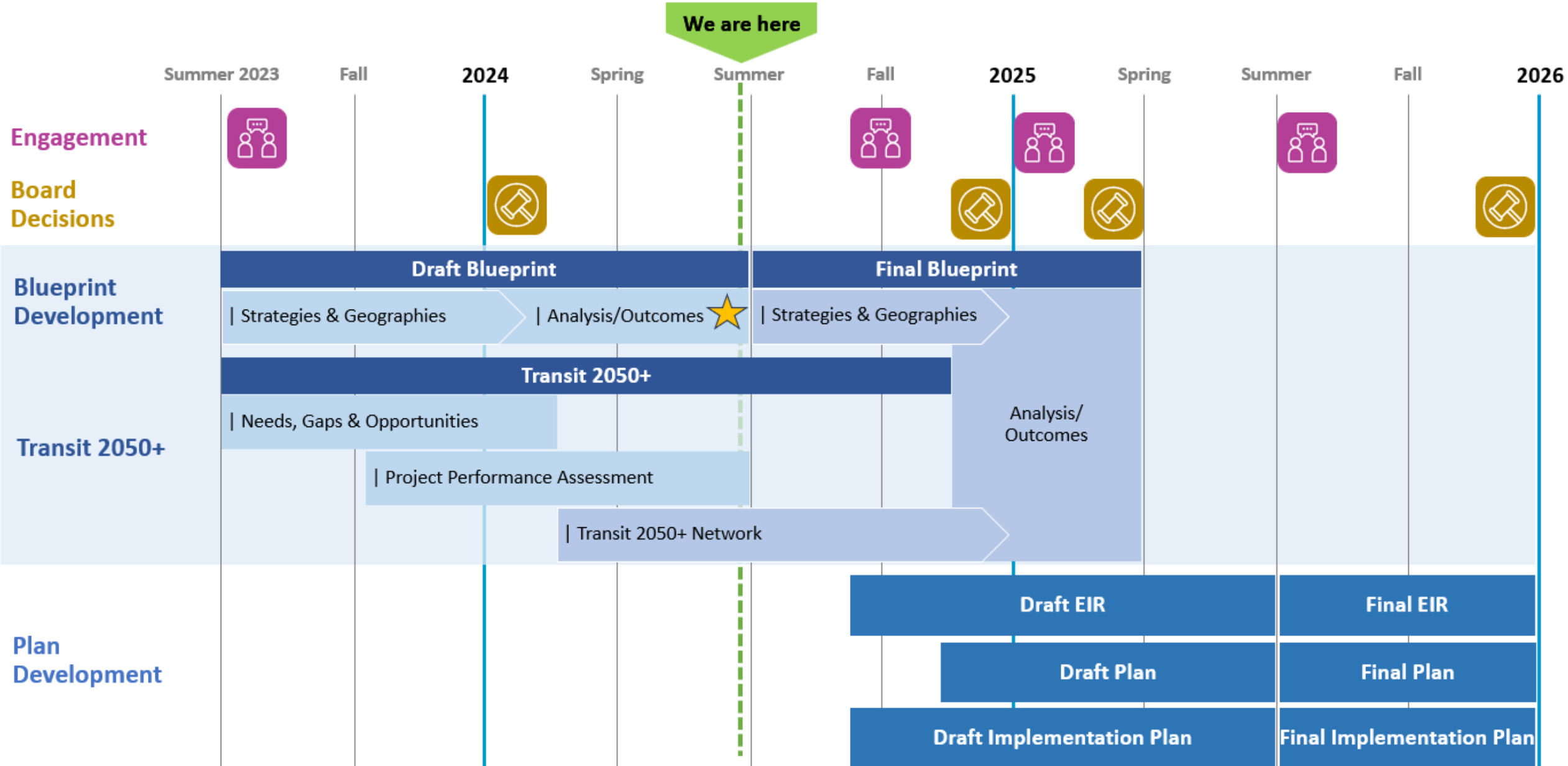
ASSOCIATION OF BAY AREA GOVERNMENTS
METROPOLITAN TRANSPORTATION COMMISSION

Plan Bay Area 2050+ Draft Blueprint: Key Findings


MTC Planning Committee and
ABAG Administrative Committee

June 14, 2024

Plan Bay Area 2050+: Schedule



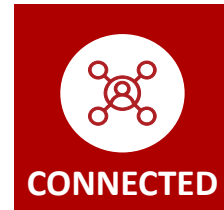
* Dates are tentative and subject to change

 = Focus of today's presentation

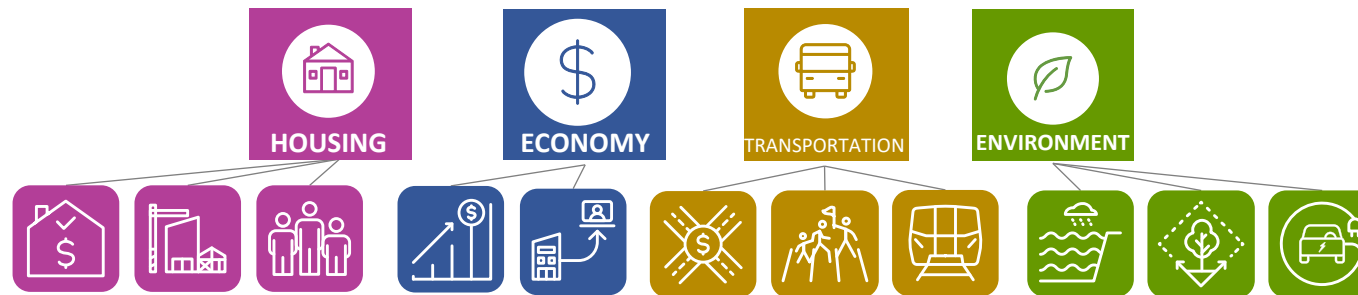
Refresher: Plan Bay Area 2050+ Scope

In addition to addressing all federal and state planning requirements, Plan Bay Area 2050+ has been:

Leveraging the vision and guiding principles established in Plan Bay Area 2050



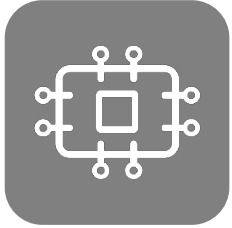
Maintaining the long-range plan's existing strategic framework and organization



Focusing on three core priorities: updated assumptions, implementation, and public information



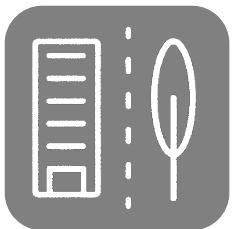
What Updates Have Informed the Draft Blueprint?



Baseline Data: including post-COVID transit service levels, local zoning & land use, and Equity Priority Communities (EPCs)



Planning Assumptions: including a Regional Growth Forecast of population, jobs, and housing; financial needs & revenue forecasts; hybrid work pattern assumptions



Strategies and Geographies: refined public policies and investments that can be implemented over a 25-year period; revised growth geographies where future housing and/or jobs will be focused under the plan's strategies

Previous Committee Updates on these Topics

*February 2024 (transit)

**EPC Update forthcoming in September 2024*

*November 2023

*November 2023

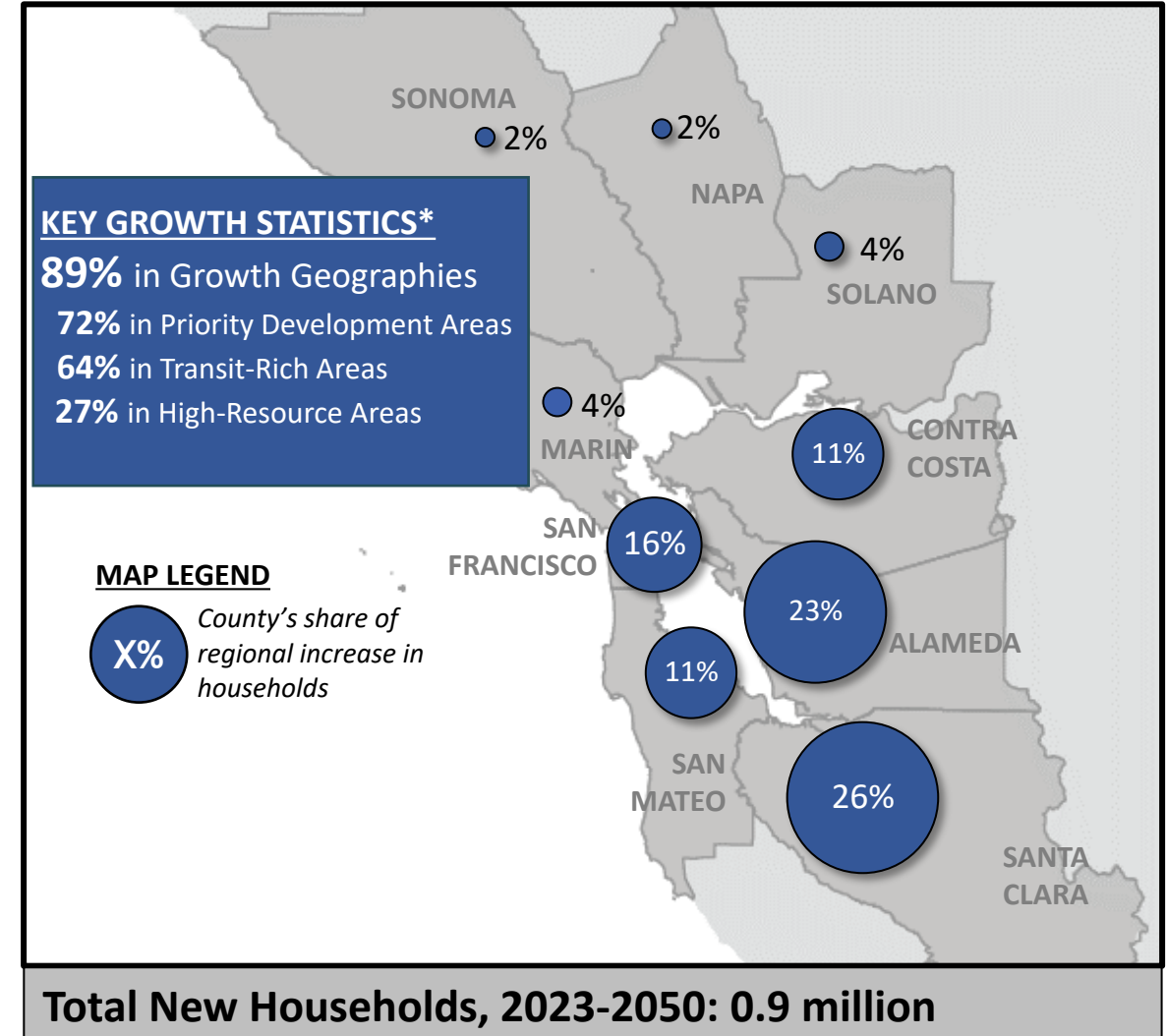
*January 2024

Draft Blueprint Growth Pattern: Household Growth

- Nearly nine in ten new households are projected to live in the plan's growth geographies, places close to transit targeted for investment in safe streets, open spaces, and community amenities
- Areas of the region with the strongest housing markets, including Silicon Valley, San Francisco, and parts of the East Bay, are expected to experience the strongest future growth
- Modest increases are expected in the North Bay to meet ongoing demand, but most growth is anticipated to be focused elsewhere in the region

Plan Bay Area 2050+ Draft Blueprint:

Share of regional household growth by county, 2023 to 2050

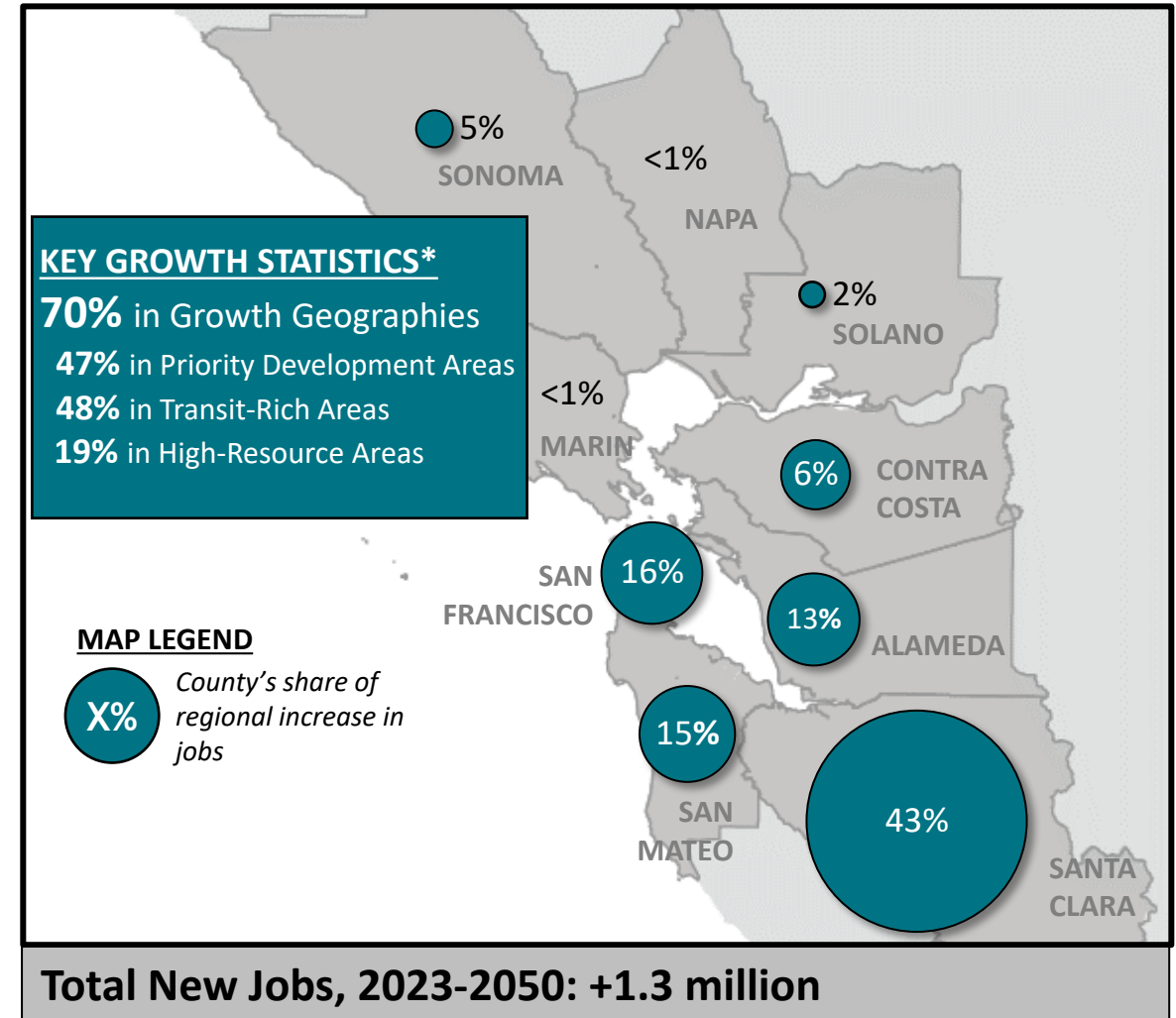


* All urbanized growth in unincorporated areas is focused within existing urban growth boundaries (Strategy EN4)

Draft Blueprint Growth Pattern: Job Growth

- Over two-thirds of all new jobs (as measured by the physical location of an employer) are anticipated to be located within the plan's growth geographies
- Similar to today, roughly one in four jobs are expected to be work from home in 2050 – contributing to higher “daytime populations” in housing-rich communities (*compared to pre-COVID*)
- Several factors intensify the concentration of projected “employer-based” jobs in Silicon Valley and the Peninsula:
 - Historically high office vacancies in locations that are attractive to high-growth industries, with less “spillover” across the rest of the region
 - Post-pandemic changes in workplace design enable more new jobs to fit into existing available space

Plan Bay Area 2050+ Draft Blueprint:
Share of regional job growth by county, 2023 to 2050



* All urbanized growth in unincorporated areas is focused within existing urban growth boundaries (Strategy EN4). Number of jobs based upon the physical location of an employer; does not account for the share of jobs at a location that are performed fully or partially remotely.

Key Findings: A More Affordable Bay Area



Will Bay Area housing costs decline?

- ✓ **Yes.** Housing cost burden declines significantly between 2023 and 2050, especially for those with the fewest means to afford Bay Area homes.

Will the Bay Area produce and preserve more affordable housing?

- ✓ **Yes.** Draft Blueprint affordable housing strategies result in nearly one-quarter of regional housing stock being permanently affordable by 2050. However, additional measures will be required to stem recent increases in development costs.

Share of household income spent on housing

	2023	2050	Change
All Households	32%	20%	-12%
Households with low incomes	70%	27%	-43%

For more information on the Draft Blueprint's performance and equity outcomes, please see Attachment B

Number and share of affordable housing units¹

	2023	2050	Change
Total affordable housing units	130,000	970,000	+840,000
Affordable units as share of all units	4%	24%	+20%

1. Figures rounded

Key Focus Area for Final Blueprint: Refine strategies to integrate development cost reduction approaches to make the most of public investment in affordable housing.



Will Bay Area residents be able to access their destinations more easily?

- ✓ **Yes.** The Draft Blueprint sees major improvements in the share of households within ½ mile of frequent transit, especially for households with low incomes. Growth pattern changes also reduce commute distances for all workers.

Will Bay Area residents have a transportation system they can rely on?

- **Depends on the highway corridor and transit operator.** Means-based tolls help reduce congestion on key corridors, but toll rates and transit service levels need to be further optimized to reflect a growing population.

Households within 1/2 mile of frequent transit

	2023	2050	Change
All Households	38%	43%	+5%
Households with low incomes	47%	64%	+17%

Please note the Draft Blueprint did not contain significant transportation expansion or enhancement investments, which will be identified as part of Transit 2050+ and the Final Blueprint process. All connectivity improvements are driven by policy and/or land use shifts, leveraging the existing transportation network.

Key Focus Area for Final Blueprint: Identify cost-effective transportation investments that align with the plan's more limited transportation expansion revenues, while further optimizing pricing strategies.

Key Findings: A More Diverse Bay Area



Will Bay Area communities be more inclusive?

- ✓ **Yes.** Households with lower incomes are able to access a wider range of housing options regionwide, including in Transit-Rich and High Resource Areas.

Will Bay Area residents be able to stay in place?

- **It depends.** While the Draft Blueprint expands renter protections and preserves at-risk affordable housing, some low-income residents may relocate to access new housing – including home ownership opportunities – as well as other amenities.

Share of households with low incomes

	2023	2050	Change
All High-Resource Areas	22%	30%	+8%
All Transit-Rich Areas	32%	41%	+9%
Transit-Rich/High-Resource Areas	24%	35%	+11%

Home ownership rate: households with low incomes

Low-income households by ownership status	2023	2050	Change
Own home	38%	49%	+11%
Rent	62%	51%	-11%

Key Findings: A Healthier Bay Area



Will the environment of the Bay Area be healthier and safer?

- ✓ **Yes.** Significant investments in active transportation and development of more walkable communities play a key role in reducing automobile mode share while reducing pollution and congestion.

Will Bay Area residents be healthier and safer?

- ✓ **Yes.** Environmental strategies in the Draft Blueprint protect nearly all communities from sea level rise and significantly expand parklands and habitat conservation areas.

Commute Mode Share

Mode	2023	2050
Auto	58%	51%
Transit	6%	10%
Active Modes (Bike/Walk)	4%	10%
Work from Home	31%	28%

Open Space Acres Per Thousand Residents

2023	2050
111	141

Key Focus Areas for Final Blueprint:

Strive to further reduce auto mode share, while integrating updated cost assumptions related to sea level rise projects and accessibility upgrades into environment strategies.

Key Findings: A Healthier Bay Area (continued)



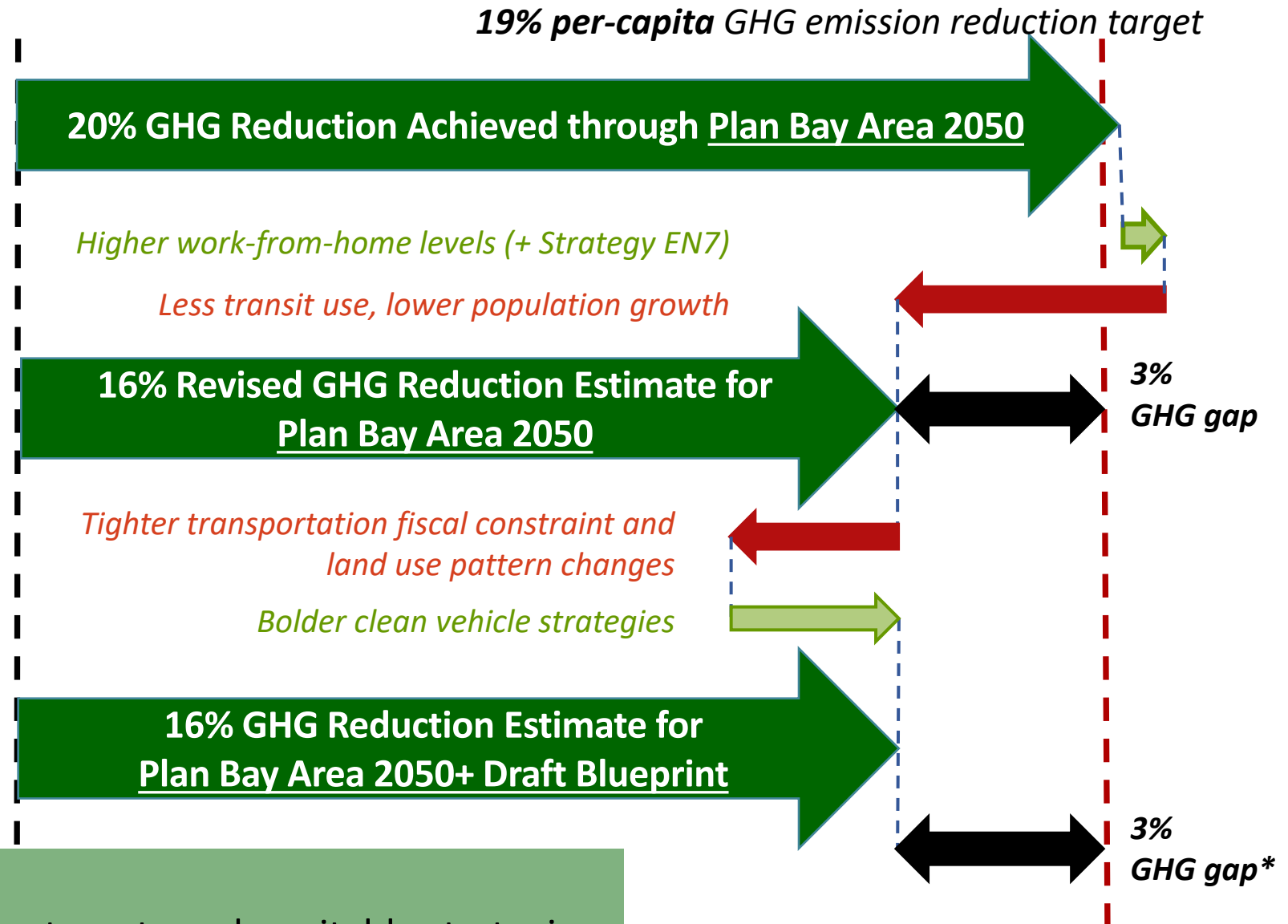
Plan Bay Area 2050 met and exceeded the GHG emissions reduction targeted set by CARB.

Re-analyzing Plan Bay Area 2050's 35 strategies under updated planning assumptions yields a **moderate GHG reduction "gap" of roughly 3 points.**

The Plan Bay Area 2050+ Draft Blueprint **maintains a similar GHG reduction gap.**

Key Focus Area for Final Blueprint:

Close the GHG "gap" with targeted investments and equitable strategies.



Key Findings: A More Vibrant Bay Area



Will the Bay Area economy thrive?

- ✓ **Yes.** The gross regional product is projected to grow by 66% over the next three decades, while economic strategies like a guaranteed income ensure that the benefits of this growth are felt more broadly.

Will the region's downtowns recover from the pandemic?

- ✓ **Yes.** The central areas of San Francisco, San Jose and Oakland are anticipated to see a full recovery spurred by a more efficient use of office space and a more balanced mix of commercial and residential land uses.

Per Capita Gross Regional Product¹ (in 2020 dollars)

	2023	2050	Total change	Percentage change
Gross regional product, per capita	\$127,000	\$207,000	\$80,000	+66%

¹Total economic output in 2020 dollars divided by the total population of the Bay Area.

Change in Typical Weekday Downtown Activity², 2023-2050

Downtown Area	In-Person Workers	Non-Work Trip	Residents
Oakland	+53%	+33%	+41%
San Francisco	+18%	+49%	+35%
San Jose	+59%	+30%	+23%
Region	+33%	+21%	+22%

²Figures reflect change in Superdistricts 18, 1, and 11 for Oakland, San Francisco and San Jose, respectively. Please note this is one of several new Vibrant metrics introduced as part of Plan Bay Area 2050+ to explore the impacts of the pandemic and work-from-home.

What's Coming Next: Late Summer 2024 Engagement

Goals

1. Share Draft Blueprint outcomes and Transit 2050+ Draft Network
2. Gather feedback on Final Blueprint focus areas
3. Identify early implementation priorities

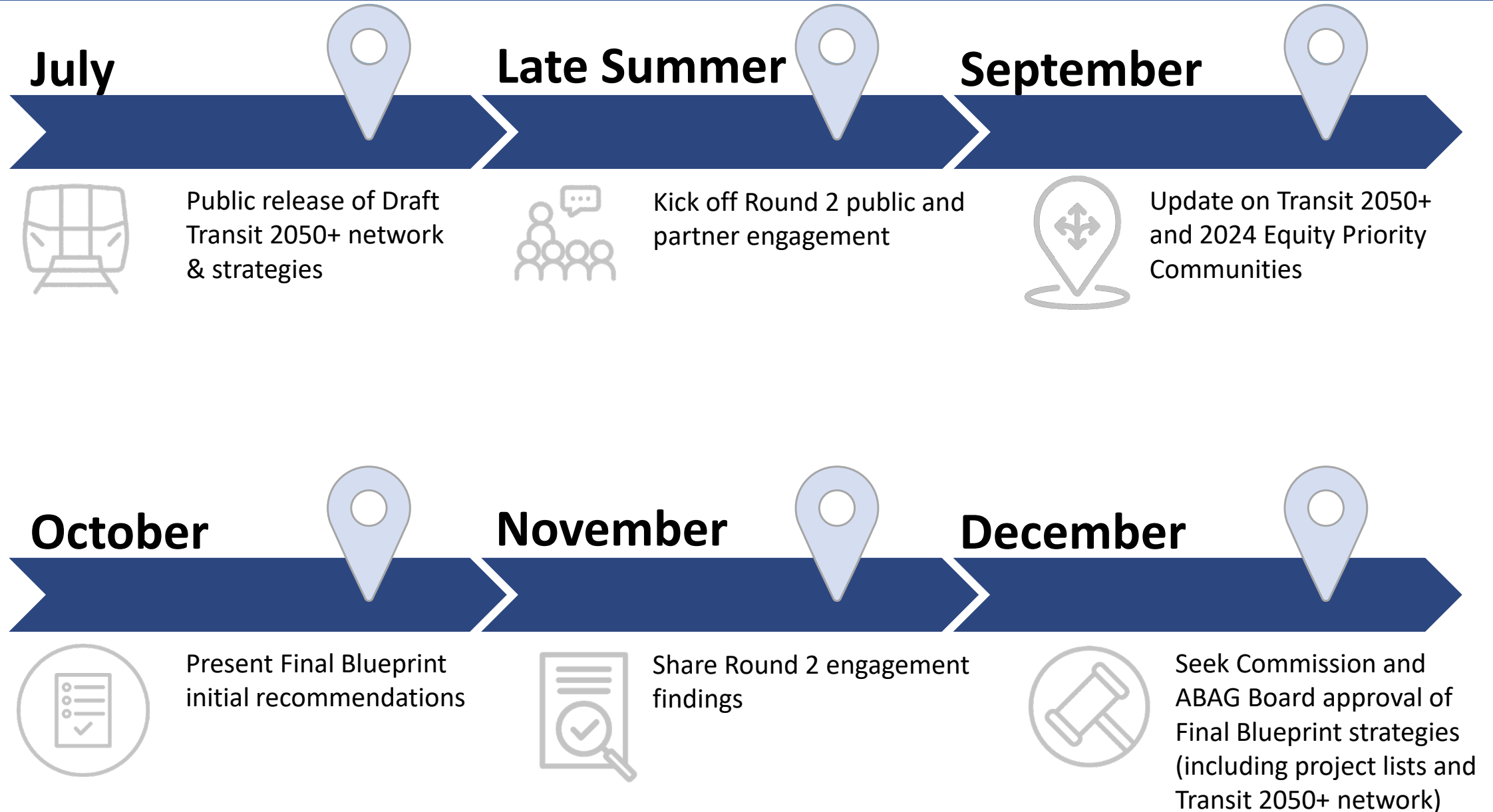
Engagement Touchpoints

- **Pop-up tabling events** across the nine counties
- **Online activity** to allow time-flexible participation
- **CBO partnerships** with EPC-serving organizations
- **Tribal outreach** and engagement with CBOs that serve Tribal and Native American communities
- **Partner and stakeholder-focused engagement** including workshops, webinars, and office hours
- **A public comment period**



Photo: Joey Kotfica

Month-to-Month Timeline



PLAN BAY AREA 2050+



Questions and Comments

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