



H O R I Z O N

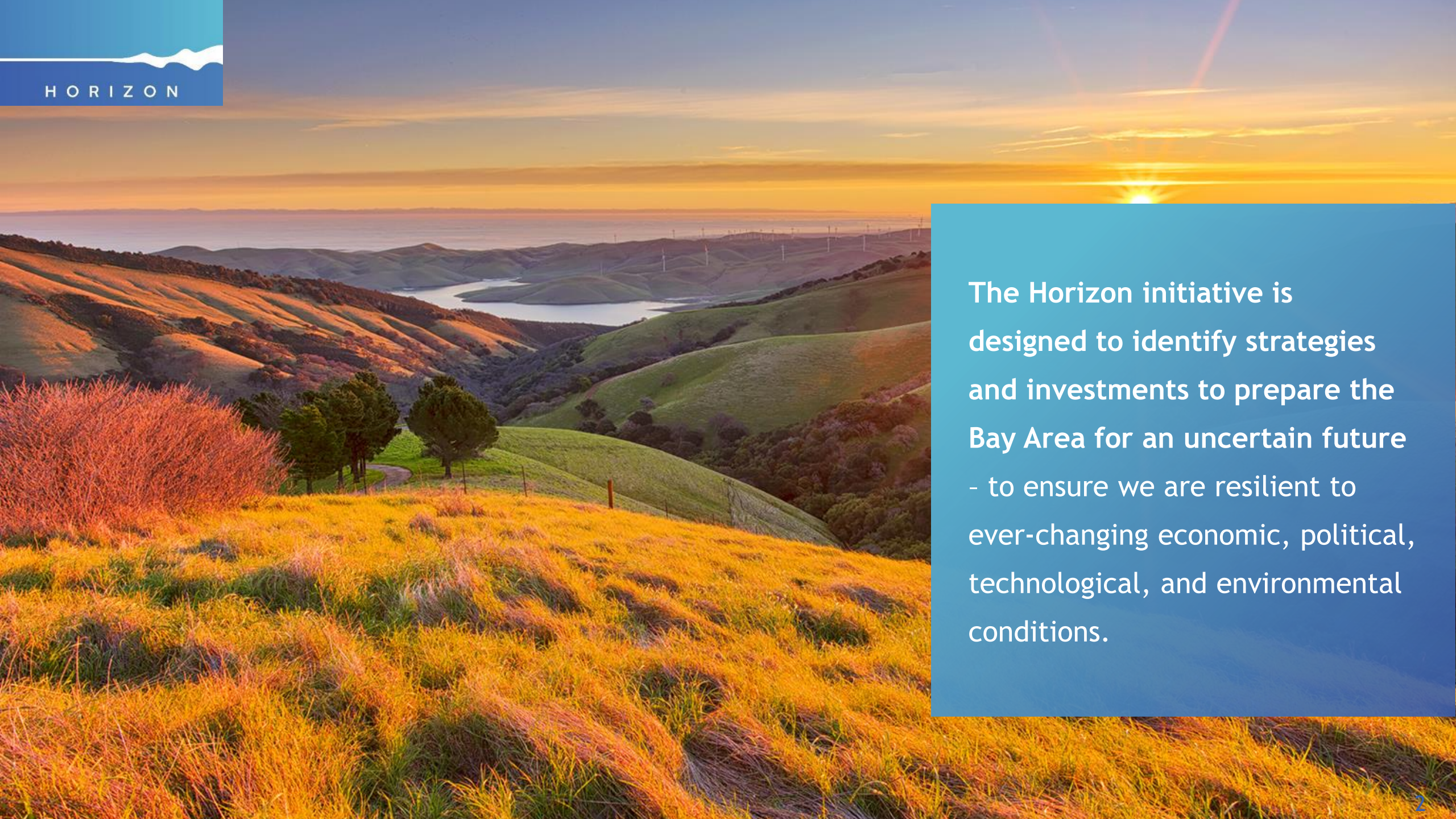


Futures Final Report

Preliminary Findings on Horizon Strategies
in Advance of Plan Bay Area 2050

ABAG Regional Planning Committee

October 2, 2019 - Michael Germeraad

The background image is a landscape photograph taken at sunset. The sky is a gradient of orange, yellow, and blue, with the sun low on the horizon. The foreground is a grassy hill with golden-brown grass. In the middle ground, there are rolling green hills, a winding road, and a body of water. In the far distance, a line of wind turbines is visible against the horizon.

The Horizon initiative is designed to identify strategies and investments to prepare the Bay Area for an uncertain future

- to ensure we are resilient to ever-changing economic, political, technological, and environmental conditions.

Three Futures - “What If?” Scenarios

A



**Rising Tides,
Falling
Fortunes**

What if... the federal government cuts spending and reduces regulations, leaving more policy decisions to states and regions?

B



**Clean
and Green**

What if... new technologies and a national carbon tax enabled greater telecommuting and distributed job centers?

C



**Back to
the Future**

What if... an economic boom and new transportation options spur a new wave of development?

Futures Planning was conducted in two distinct phases to answer two key questions.

Round 1 Futures Analysis

- How does the region's currently-adopted Plan fare in an era of uncertainty?
- Findings are described in the March 2019 *Futures Interim Report*.

Round 2 Futures Analysis

- How might new strategies result in improved outcomes in each Future?
- Findings will be described in the Fall 2019 *Futures Final Report*.



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Refresher: Five Challenges from Round 1 Analysis

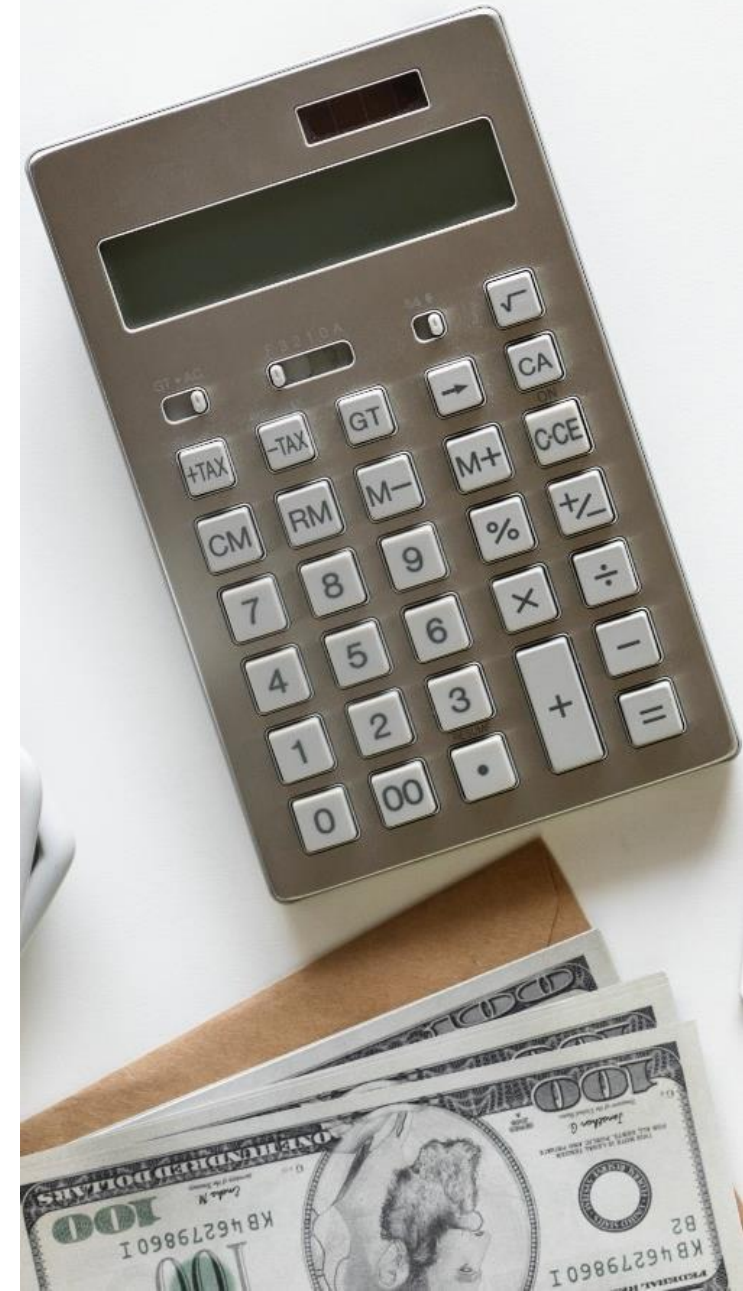
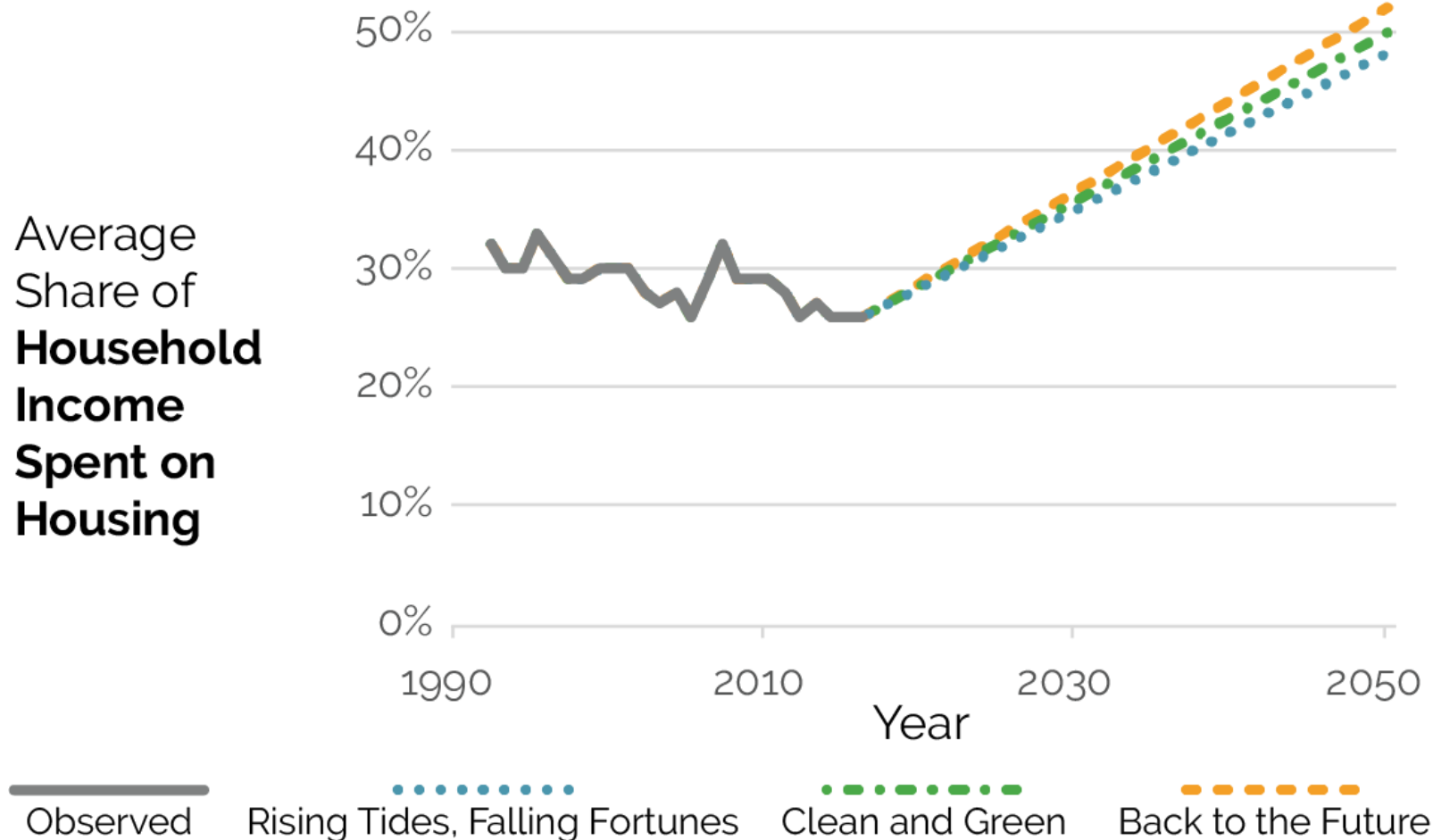
In the Futures Interim Report (March 2019), a set of key challenges were identified. The challenges focused on how Plan Bay Area 2040 strategies might fare under previously-unstudied external forces like sea level rise, autonomous vehicles, and federal policy shifts.

Challenge



AFFORDABLE

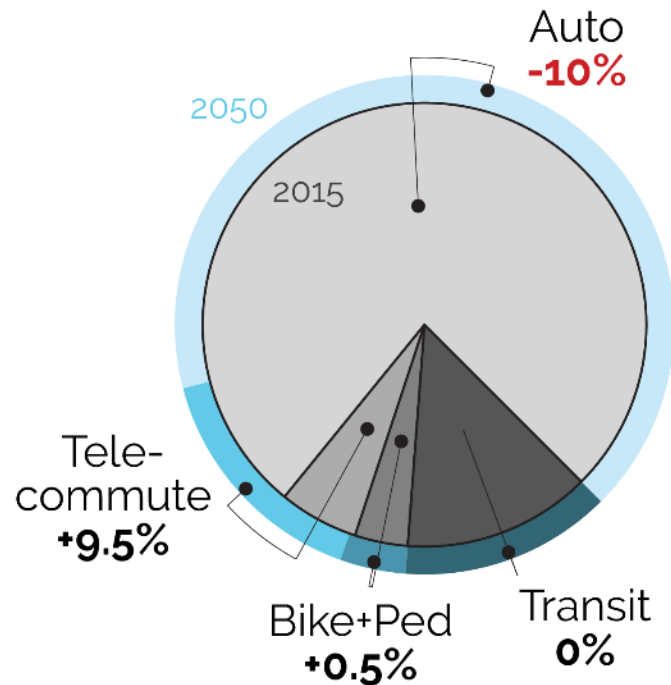
Without new strategies in place, Bay Area housing affordability continued to get worse.



Public transit, walking, and bicycling saw limited gains in mode share compared to 2015 conditions.

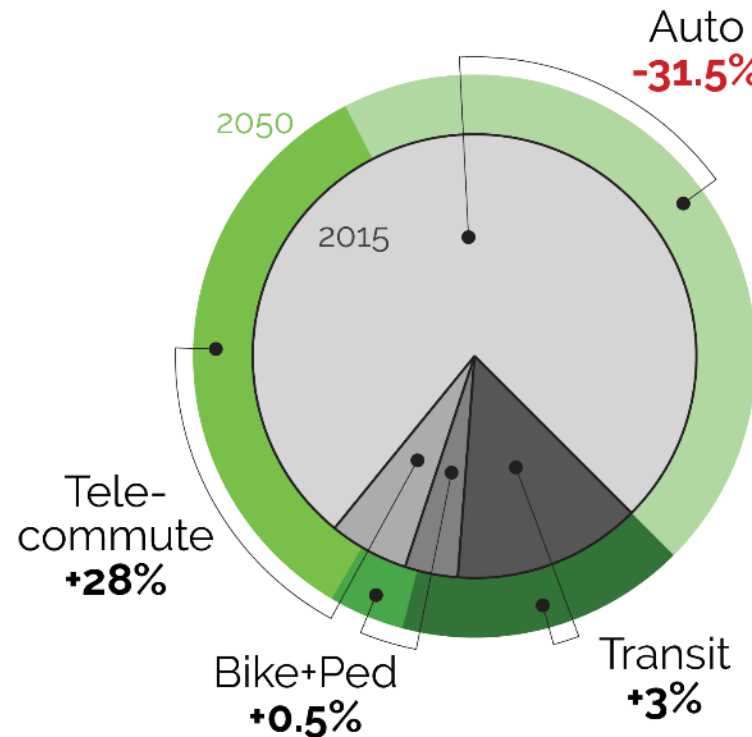
Rising Tides, Falling Fortunes

In 2050, 67% of commuters use autos.



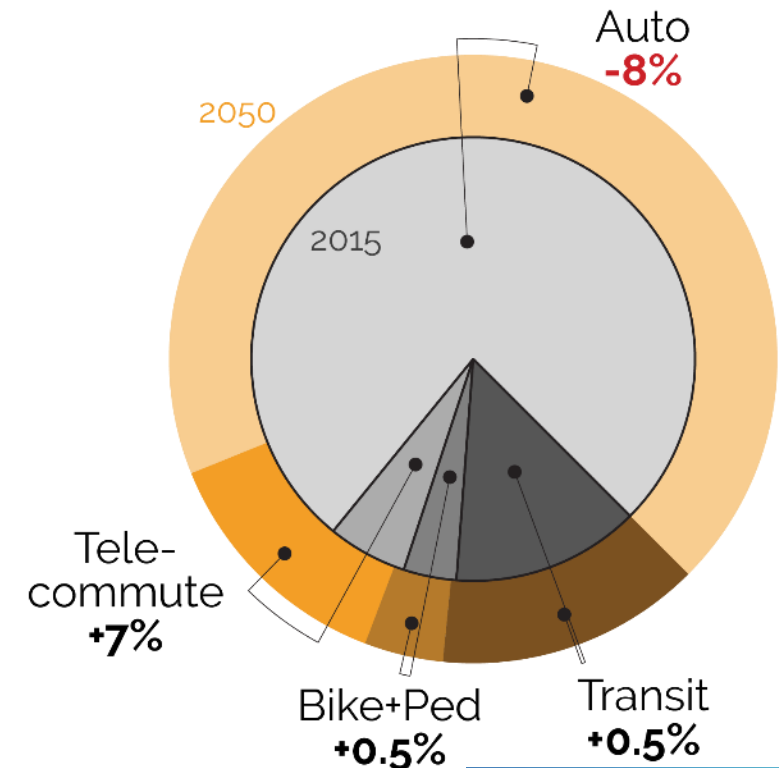
Clean and Green

In 2050, 45% of commuters use autos.



Back to the Future

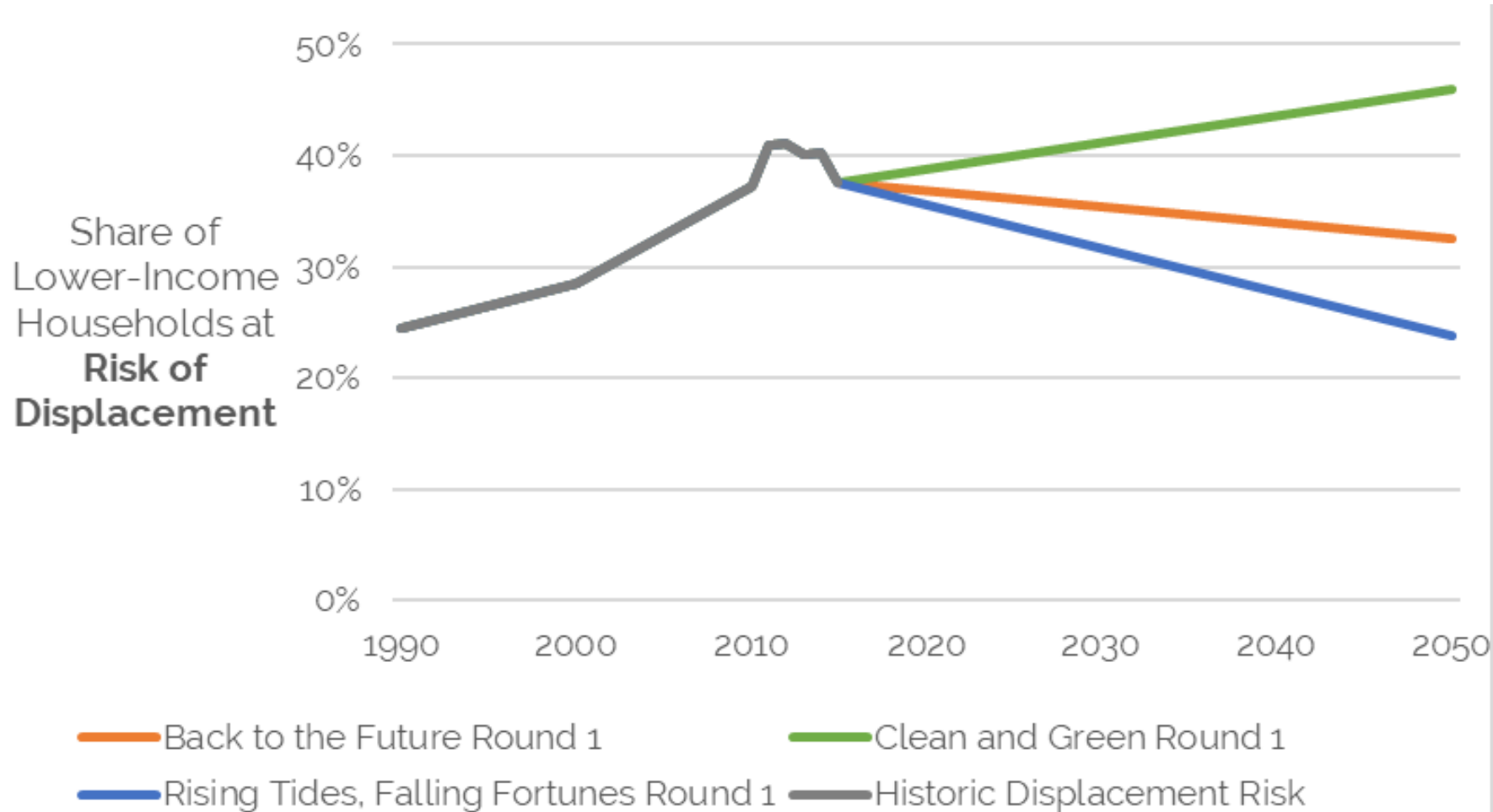
In 2050, 69% of commuters use autos.



In 2015, 77% of commuters use an automobile to get to work.

Challenge

A significant share of lower-income households remained at risk of displacement in each Future.



Unmitigated impacts from sea level rise and natural disasters resulted in significant damage across the region.

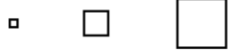
Rising Tides, Falling Fortunes
3 feet of sea level rise

Clean and Green
1 foot of sea level rise

Back to the Future
2 feet of sea level rise

Homes Affected by Hazards





1k 10k 40k

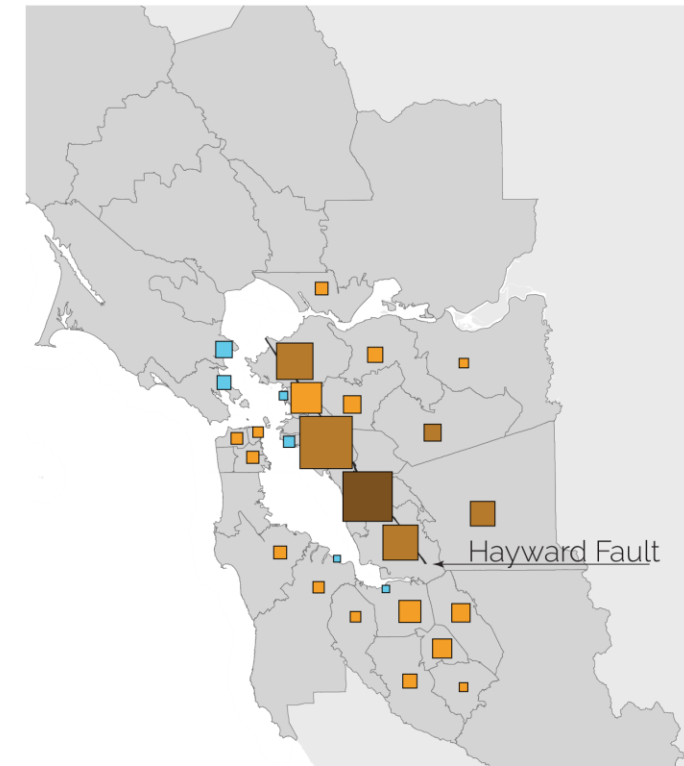
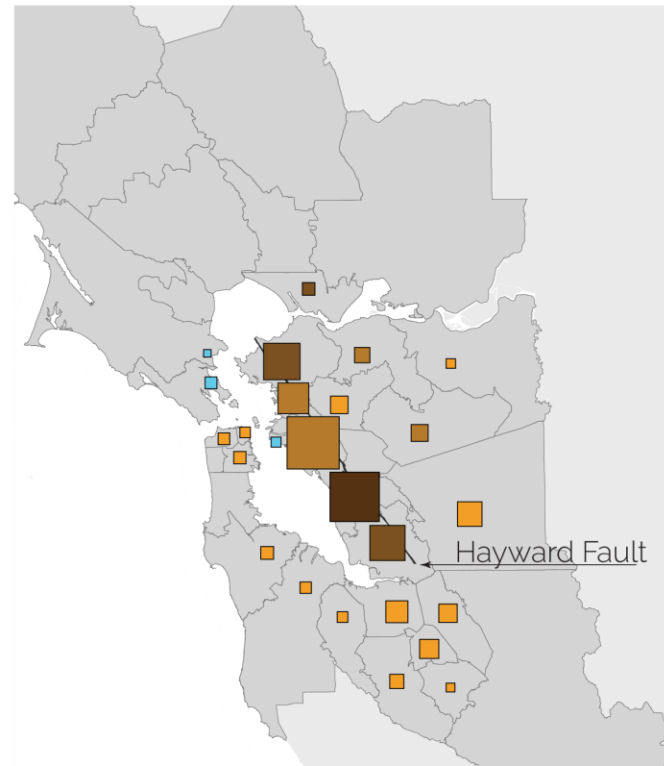
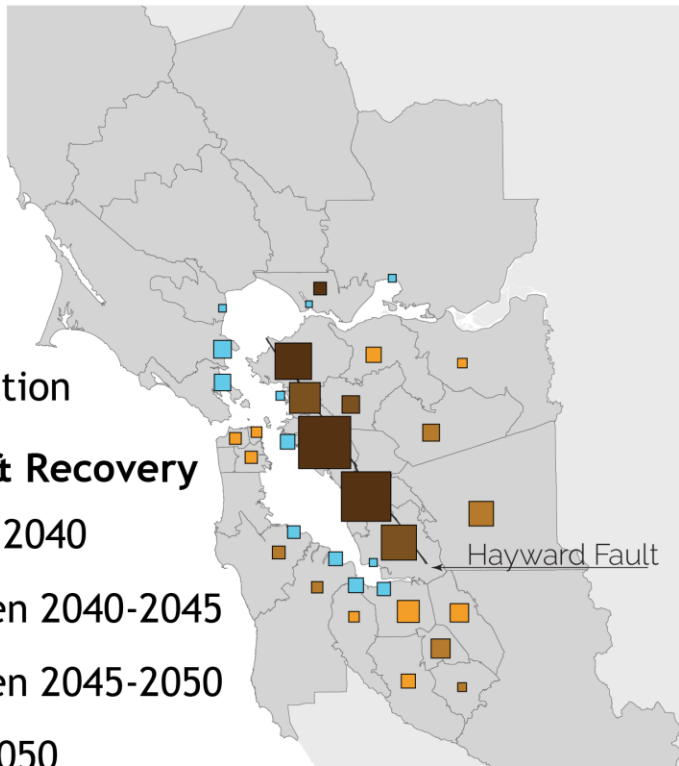


Sea Level Rise

 Permanent Inundation

Earthquake Damage & Recovery

-  Recovered before 2040
-  Recovered between 2040-2045
-  Recovered between 2045-2050
-  Recovered after 2050



Land use strategies included in *Plan Bay Area 2040* were insufficient to address the region's longstanding jobs-housing imbalance.

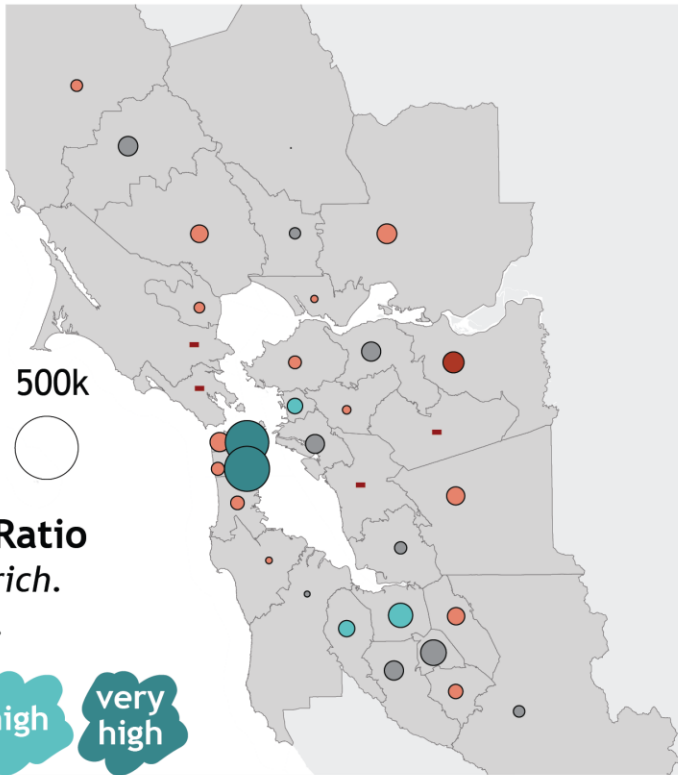
Rising Tides, Falling Fortunes
+0.5M Homes, +0.5M Jobs

Overall Growth
Circle area represents combined job & housing growth from 2015 to 2050.

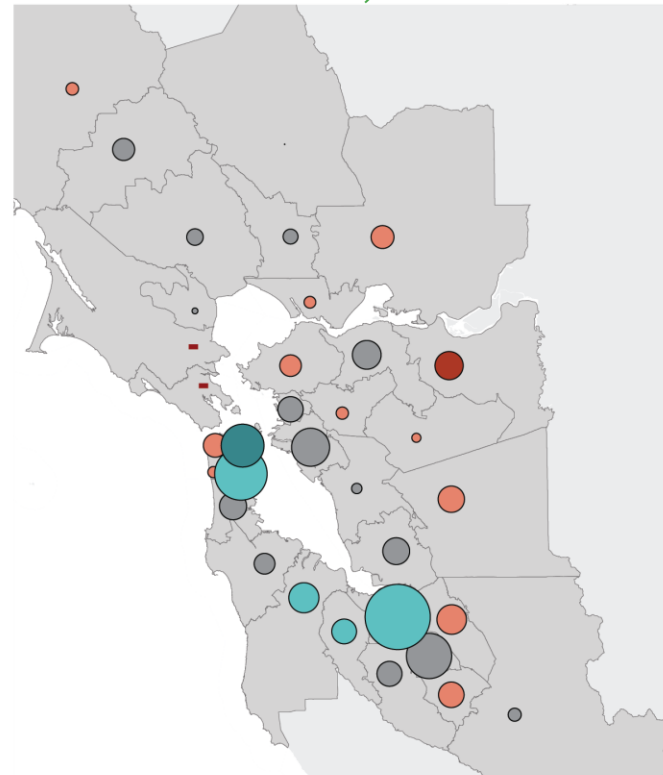
negative growth 10k 100k 500k

2050 Jobs/Housing Ratio
Red areas are housing rich.
Blue areas are job rich.

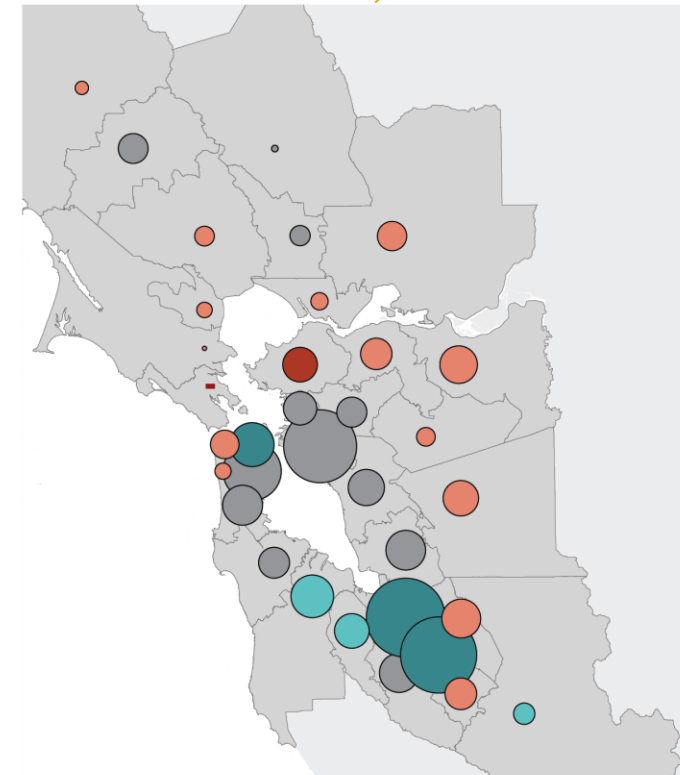
very low low avg. high very high



Clean and Green
+1.3M Homes, +1.1M Jobs



Back to the Future
+2.1M Homes, +2.7M Jobs





H O R I Z O N

Top 10 Horizon Strategy Findings

We have explored the effectiveness of over 30 strategies to improve the region's economic, housing, transportation, and environmental challenges.

New growth areas enable more growth near transit and near opportunity.



Allow Diverse Housing Around Transit



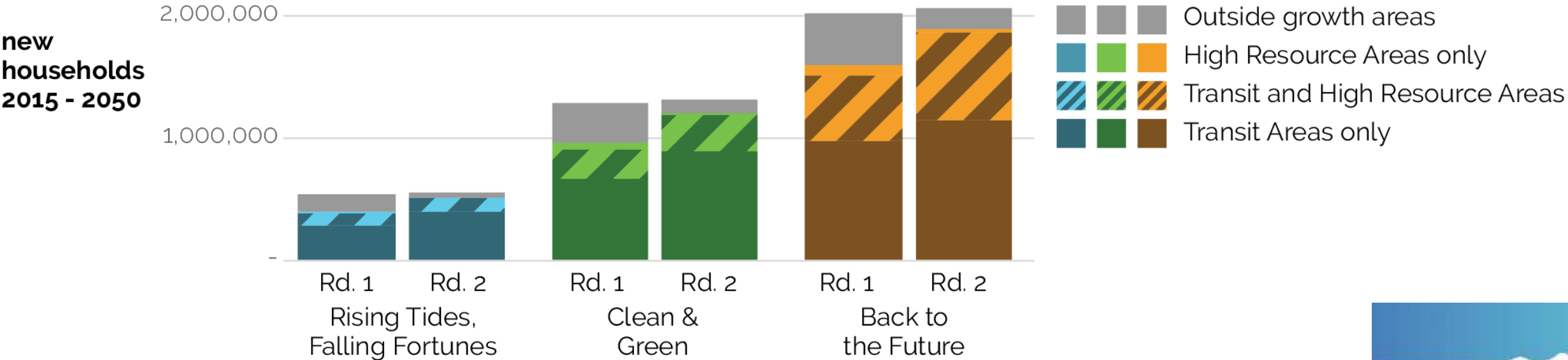
Allow more diverse housing growth around areas with high frequency transit. Expand the growth footprint beyond the current list of PDAs.

Allow Diverse Housing in High Resource Areas



Allow more diverse housing growth in areas of high opportunity that also have moderate transit service. Expand the growth footprint beyond the current list of PDAs.

Location of households added between 2015-2050 relative to growth geography



A mix of strategies to retain and expand affordable housing made progress in addressing the current affordable housing gap.

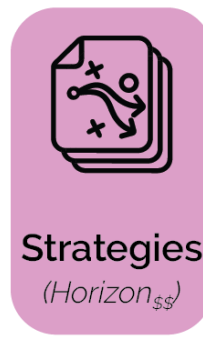


Pass Inclusionary Zoning Policies



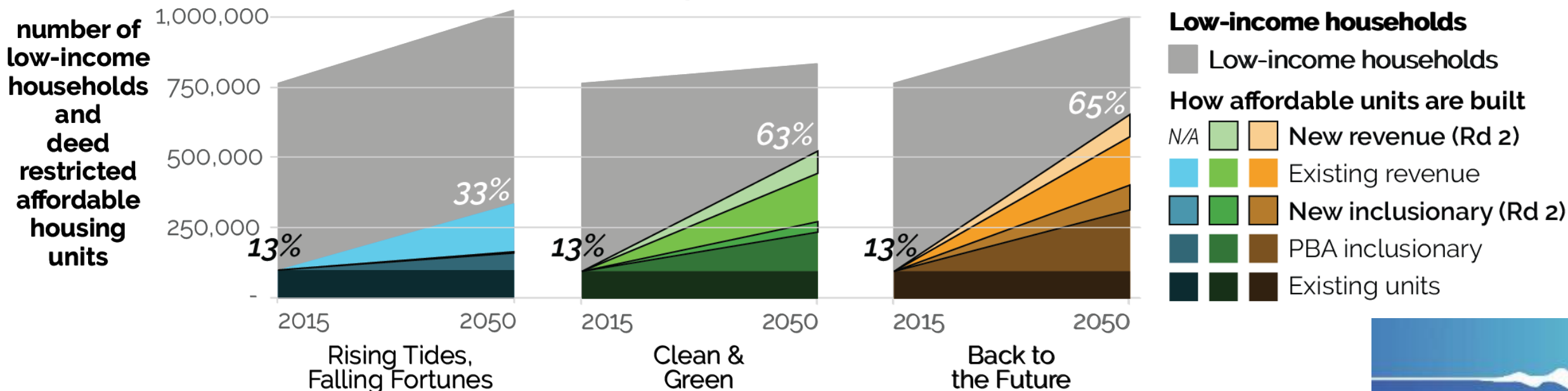
All Bay Area jurisdictions pass a 10% to 20% inclusionary zoning policy, expanding off the Plan Bay Area 2040 inclusionary strategy.

Raise Revenue for Affordable Housing



Raise \$1.5 billion in new annual revenue to complement existing federal, state, and local affordable housing funds.

Number of deed restricted affordable housing units and the number of low-income households



New active transportation strategies proved the most effective in shifting modes.



Implement Vision Zero Speed Reductions



Strategies
(Horizon_{\$})

Reduce speed limits to 25 mph on local roads within 3 miles of transit, in addition to reducing speeds on highways.

Build a Micromobility Network



Strategies
(Horizon_{\$})

Complete regional bicycle trails and fund thousands of miles of dedicated micromobility networks like class IV and II bike lanes.

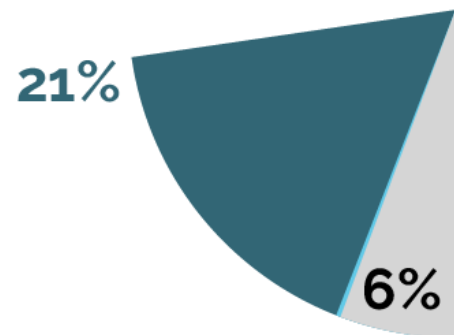
Invest in Free Short-Trip Service



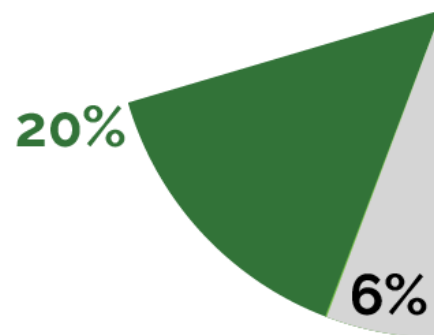
Strategies
(Horizon_{\$})

Fund shared personal mobility, including scooters and electric bikes, within 3 miles of transit.

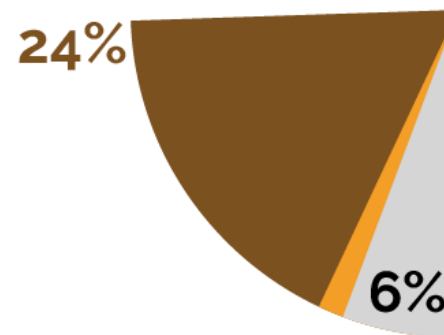
Active (walk & bike) mode share in 2015, and Futures round 1 and round 2 analysis



Rising Tides,
Falling Fortunes

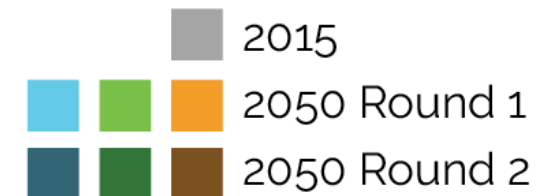


Clean &
Green



Back to
the Future

active (walk+bike) mode share



The mode share is reflective of commute mode, The ratio is higher when accounting for all trips.

Additional transportation findings are still being finalized.

Transit overcrowding was generally alleviated, with new BRT lines as well as a new Transbay Rail Crossing playing a key role.



Road pricing reduced roadway congestion, but equity concerns need to be addressed before advancing this strategy further.



*Data associated with two findings above are still being finalized;
this will be presented in greater detail at the joint ABAG Administrative
and MTC Planning Committee meeting.*

Economic development strategies evaluated were insufficient to slow the decline of the middle class.



Create Job Incubator Programs



Strategies
(Horizon_{\$})

Expand and create new job incubator programs in economically challenged communities.

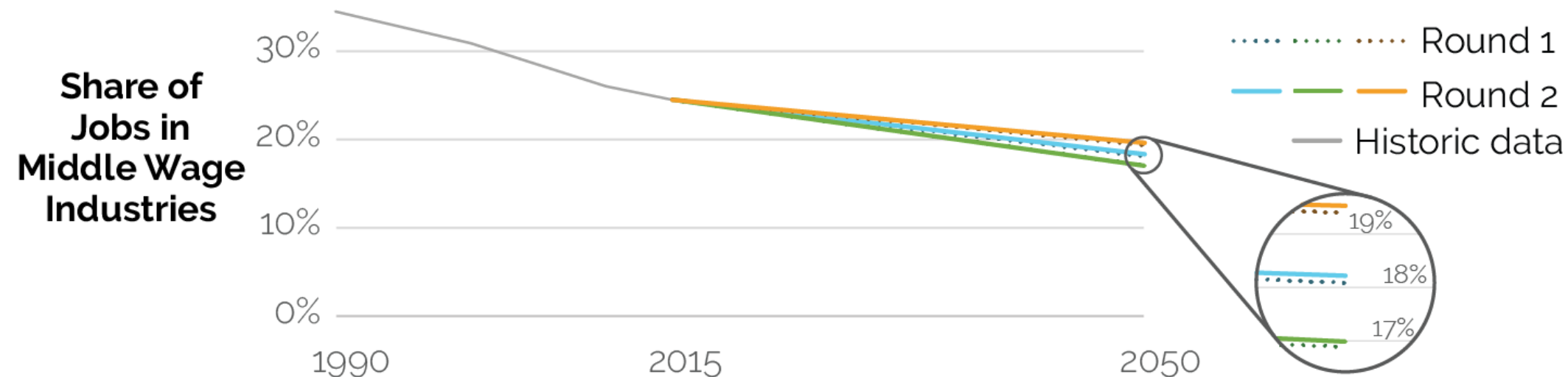
Expand Construction Workforce Programs



Strategies
(Horizon_{\$})

Expand construction workforce development and training programs. Support early construction professionals in early apprenticeship years.

Share of regional jobs in middle wage industries - historic and projected



Adaptation and retrofit strategies boosted our region's resilience.



Adapt to Sea Level Rise



Strategies
(Horizon_{\$\$})

Leverages existing and new revenues to fund a hybrid set of grey and green infrastructure systems to adapt the region.

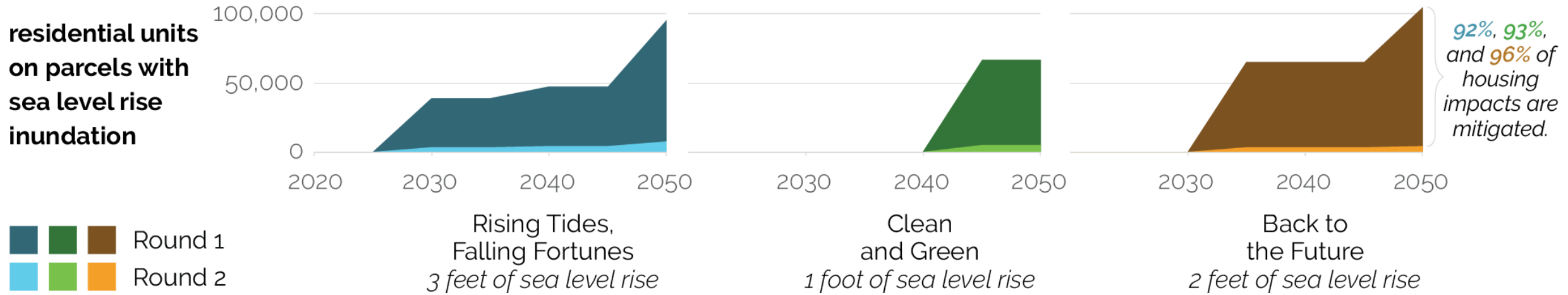
Retrofit Older Existing Buildings



Strategies
(Horizon_{\$\$})

Provides 50% subsidies for older buildings built before current codes to support common earthquake, wildfire, energy, and water retrofit strategies.

Residential sea level rise impacts in Futures round 1 (without adaptation) and round 2 (with adaptation)



Urban growth boundaries led to minimal greenfield development in both Round 1 and Round 2.



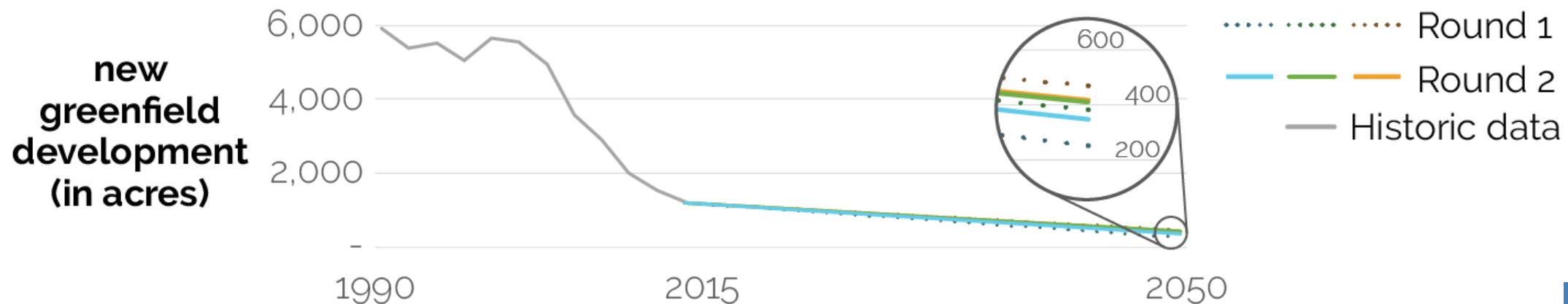
Maintain Urban Growth Boundaries



Strategies
(PBA 2040)

Restrict urban development on greenfield lands, continuing the region's recent commitment to reducing sprawl outward.

Acres of greenfield development annually - historic and projected.



A VMT-based fee on office development was effective in focusing office growth, but not in shifting jobs to the East and North Bay.



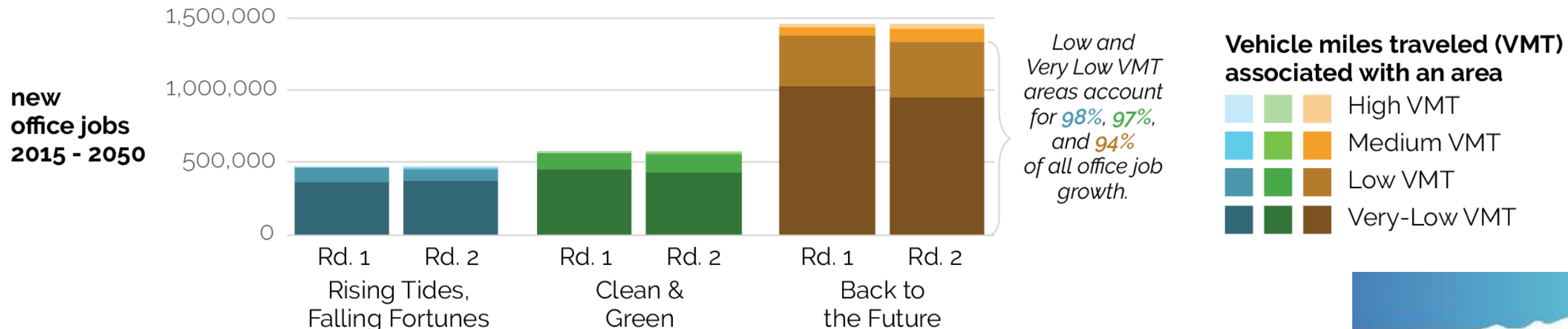
Apply a VMT-Based Fee on Office Development



Strategies
(PBA 2040)

Apply a fee on new office development in areas that have high employment-related vehicle miles traveled (VMT), expanding upon a Plan Bay Area 2050 strategy.

Location of new office-related job growth relative to an area's associated VMT level



A large tax package focused on higher-income individuals and businesses did not have significant adverse impacts on the economy.



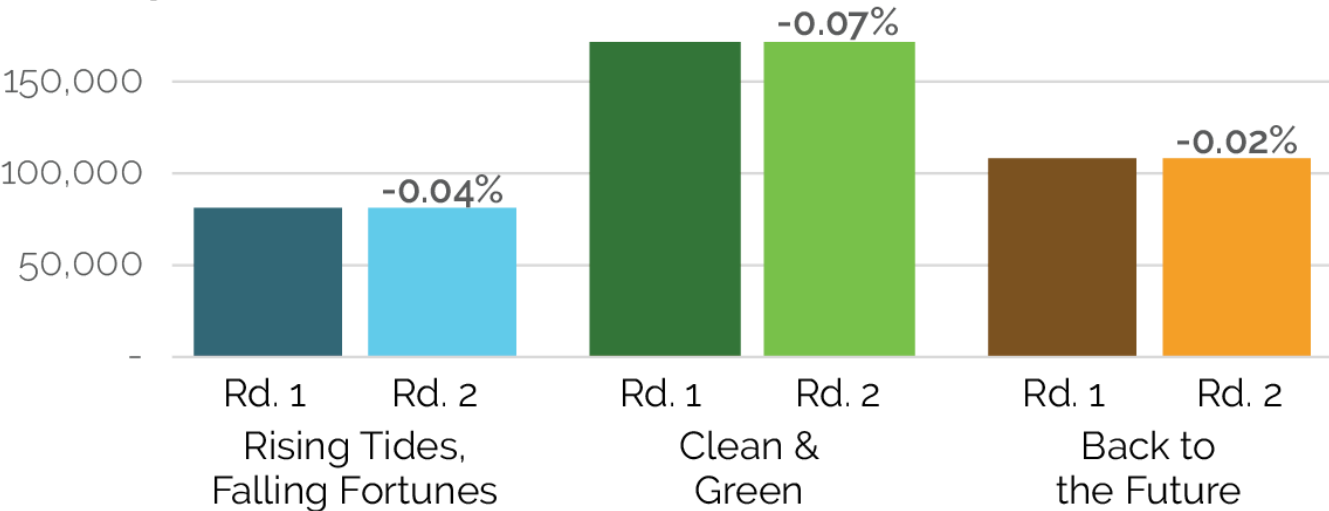
Raise New Revenues



A balanced tax is evenly placed on businesses, parcels (building and home owners), and high-income earners.

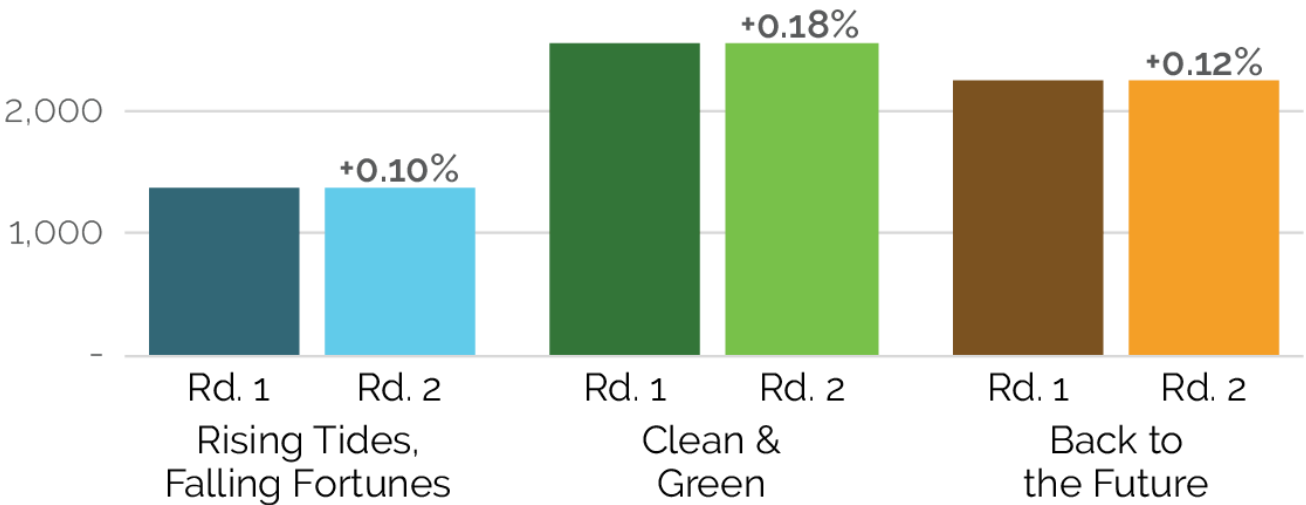
Projected Average Household Income in 2050

2050
Average
Household
Income
(in 2018
dollars)



Projected Annual Gross Regional Product in 2050

2050
Gross
Regional
Product
(in billions of
2018 dollars)



Initial economic analysis indicates that impacts would be relatively limited; however, further refinements could better reflect a fuller suite of benefits from infrastructure investments.

Futures Final Report: Strategies for a Resilient and Equitable Future

The full report will highlight the full suite of strategies studied and describes to what extent the region performs better with these strategies.

The report is expected to be posted on the MTC website later this month.

FUTURES FINAL REPORT

RESILIENT AND EQUITABLE
STRATEGIES FOR
THE BAY AREA'S FUTURE

OCTOBER 2019



H O R I Z O N

What's Next?

Horizon provided an opportunity to “stress test” key strategies in advance of Plan Bay Area 2050. Input from elected officials, stakeholders, and the general public will help inform further refinements to make the strategies as resilient and equitable as possible.

Plan Bay Area 2050 Schedule

