Item 5 - A Bold New Transportation Vision in 5 Big Moves
Regional Planning Technical Working Group – June 13, 2019

A Key Moment for the Region
Emerging Technologies

Worsening Congestion
The Law of the Land

19% - 19%
- California Senate Bill 375
- Federal Clean Air Act

A Bold New Vision
Where People Live Today

- 3.3 million residents
  - 700,000 more expected by 2050
- Nation’s 5th most populous county
- Busiest land port in the western hemisphere
- 84 million VMT daily
  - 24% growth expected by 2050

Where People Work

- $232 billion economy
- The region would rank 26th if it were a state
- Positioned for the 21st century in biotech and other innovative sectors
- 1.5 million jobs regionwide
Regional Assessment of Employment Centers

Population

<table>
<thead>
<tr>
<th>Year</th>
<th>Number</th>
</tr>
</thead>
<tbody>
<tr>
<td>2018</td>
<td>3.3 million</td>
</tr>
<tr>
<td>2050</td>
<td>4.0 million</td>
</tr>
</tbody>
</table>

- 20% of the population in 2018
- 20% of the population in 2050

VMT

<table>
<thead>
<tr>
<th>Year</th>
<th>Number</th>
</tr>
</thead>
<tbody>
<tr>
<td>2018</td>
<td>84 million</td>
</tr>
<tr>
<td>2050</td>
<td>103 million</td>
</tr>
</tbody>
</table>

- 24% of the VMT in 2018
- 24% of the VMT in 2050

- 64% of trips considered “mandatory” in 2050
- 1 of 3 trips are for work or work related in 2050
- 12.2 average commute to work in 2050
Employment Centers

- 1,525,500 Civilian Jobs
- 83% represented in an employment center
**Tier 1 Centers**

Count: 3

Largest Employers, Corporate Headquarters

8,700 Businesses
328,000 Jobs
$82,000 Average Wage
8 million Daily VMT
12.1 miles Average Trip Length

<table>
<thead>
<tr>
<th>Sector</th>
<th>Count</th>
</tr>
</thead>
<tbody>
<tr>
<td>Professional, Scientific, and Technical</td>
<td>18.2%</td>
</tr>
<tr>
<td>Local Government</td>
<td>8.3%</td>
</tr>
<tr>
<td>Administrative Services</td>
<td>7.7%</td>
</tr>
<tr>
<td>Healthcare / Social Services</td>
<td>7.6%</td>
</tr>
<tr>
<td>Manufacturing</td>
<td>6.4%</td>
</tr>
<tr>
<td></td>
<td>51.8%</td>
</tr>
<tr>
<td>All Other</td>
<td></td>
</tr>
</tbody>
</table>

**Tier 2 Centers**

Count: 10

Healthcare and Retail Clusters

13,000 Businesses
304,000 Jobs
$55,000 Average Wage
6 million Daily VMT
10.0 miles Average Trip Length

<table>
<thead>
<tr>
<th>Sector</th>
<th>Count</th>
</tr>
</thead>
<tbody>
<tr>
<td>Healthcare / Social Services</td>
<td>17.3%</td>
</tr>
<tr>
<td>Retail Trade</td>
<td>12.1%</td>
</tr>
<tr>
<td>Manufacturing</td>
<td>9.3%</td>
</tr>
<tr>
<td>Food Services</td>
<td>8.9%</td>
</tr>
<tr>
<td></td>
<td>52.4%</td>
</tr>
<tr>
<td>All Other</td>
<td></td>
</tr>
</tbody>
</table>
Tier 3 Centers

Count: 15

Construction and Manufacturing

11,000 Businesses
280,000 Jobs
$57,000 Average Wage
6.3 million Daily VMT
11.3 miles Average Trip Length

12.8% Manufacturing
11.2% Retail Trade
9.0% Construction
8.8% Professional, Scientific, and Technical
8.5% Food Services
49.7% All Other

Tier 4 Centers

Count: 51

Local Serving, Retail, and Restaurants

18,000 Businesses
352,000 Jobs
$44,000 Average Wage
7.4 million Daily VMT
10.5 miles Average Trip Length

16.7% Retail Trade
14.1% Healthcare / Social Services
13.3% Food Services
5.8% Manufacturing
50.2% All Other
Regional Analysis

Economic, Demographic, and Travel Information for Employment Centers
Data Packets

Employment centers in the San Diego region: An analysis of where people live and work

Sorrento Valley

Table 2: What jurisdictions downtown San Diego employment center employees travel from

<table>
<thead>
<tr>
<th>Jurisdiction</th>
<th>Number of workers in employment center</th>
<th>Percent of workers in employment center</th>
</tr>
</thead>
<tbody>
<tr>
<td>San Diego</td>
<td>36,596</td>
<td>61%</td>
</tr>
<tr>
<td>University City</td>
<td>6,267</td>
<td>10%</td>
</tr>
<tr>
<td>Chula Vista</td>
<td>6,129</td>
<td>10%</td>
</tr>
<tr>
<td>La Jolla</td>
<td>1,724</td>
<td>3%</td>
</tr>
<tr>
<td>El Cajon</td>
<td>1,616</td>
<td>3%</td>
</tr>
<tr>
<td>National City</td>
<td>1,331</td>
<td>2%</td>
</tr>
<tr>
<td>Santee</td>
<td>1,152</td>
<td>2%</td>
</tr>
<tr>
<td>Lemon Grove</td>
<td>722</td>
<td>1%</td>
</tr>
<tr>
<td>Carlsbad</td>
<td>715</td>
<td>1%</td>
</tr>
<tr>
<td>Imperial Beach</td>
<td>644</td>
<td>1%</td>
</tr>
<tr>
<td>Escondido</td>
<td>607</td>
<td>1%</td>
</tr>
<tr>
<td>Poway</td>
<td>590</td>
<td>1%</td>
</tr>
<tr>
<td>Oceanside</td>
<td>471</td>
<td>1%</td>
</tr>
<tr>
<td>Coronado</td>
<td>421</td>
<td>1%</td>
</tr>
<tr>
<td>Encinitas</td>
<td>415</td>
<td>1%</td>
</tr>
<tr>
<td>Vista</td>
<td>395</td>
<td>1%</td>
</tr>
<tr>
<td>San Marcos</td>
<td>331</td>
<td>1%</td>
</tr>
<tr>
<td>Solana Beach</td>
<td>97</td>
<td>&lt;1%</td>
</tr>
<tr>
<td>Del Mar</td>
<td>56</td>
<td>&lt;1%</td>
</tr>
<tr>
<td>Total</td>
<td>60,281</td>
<td>100%</td>
</tr>
</tbody>
</table>

Key contact
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(619) 350-9888
rmajor@sandag.org

APRIL 2015

Sorrento Valley employment centers:
- 109,292 employees
- 15,511 full-time jobs
- 9,376 part-time jobs
- 52,048 employees per square mile
- 96.60 employees per business

Sorrento Valley Demographic and Economic Information

Who works and lives in the Sorrento Valley employment center?

- 28.7% Hispanic
- 33.5% Asian
- 28.4% White
- 7.5% African American
- 5% Other

Average age in the Sorrento Valley employment center
- 35.5 years

Average household size in the Sorrento Valley employment center
- 2.95

Economic indicators in the Sorrento Valley employment center
- Median household income: $85,403
- Median household size: 2.95
- Median household age: 35.5

Income distribution in the Sorrento Valley employment center
- 44% High income
- 34% Middle income
- 22% Low income
Sorrento Valley Transportation Information

Figure 5: What mode of transportation do Sorrento Valley employment center employees use to get to work during peak period

SOURCE: SANDAG Activity Based Model, 2016

Figure 6: How far Sorrento Valley employment center employees travel from home to work by automobile to get to the employment center at any time

SOURCE: SANDAG Activity Based Model, 2016

Packets available at sandag.org/EmploymentCenters

Economics and Finance
SANDAG evaluates, monitors, and reports on issues affecting the fiscal stability and economic prosperity of the region.

Current Economics and Finance Projects
Employment and Residential Land Inventory
An inventory of the available non-retail employment land in the region.
5 Big Moves

COMPLETE CORRIDORS  TRANSIT LEAP  MOBILITY HUBS  FLEXIBLE FLEETS  NEXT OS

Complete Corridors
Mobility Hubs

Image of a town centre in Singapore
Source: Ministry of Transport, Singapore

Mobility Hubs
Flexible Fleets

Next OS
Next OS

Potential Critical Connections

- High Speed Complete Corridor
- East-West Complete Corridor
- Blue Line Express
- Purple Line
- Del Mar Trench
- UTC-Sorrento Valley Connector
- Mobility Hubs
78 Corridor
Employees place of residence

2015 Regional Plan

Five Big Moves

- TransNet HOV Lane
- Local Relief
- Complete Corridor
- Transit Leap
- Mobility Hub
- Flexible Fleets
What’s Next?

- Summer webinars on the 5 Big Moves
- Framework (projects, programs, policies) in November
- Adopt the plan in late 2021
Overview

- Climate Goals
- Land Use
- Mobility Hubs
- Other policies to enable 5 Big Moves
State, Regional, and Local Planning to Reduce Greenhouse Gas Emissions

GHG Considerations

- Senate Bill 375 GHG reduction targets
  - Passenger vehicle emissions
  - Investments in transportation strategies and infrastructure
- Local Climate Action Plans
  - Support local CAP goals
  - Identify complementary programs and policies
- CEQA GHG analysis
  - Analyze all sources of emissions
Exploring Land Use Scenarios

- New information to consider:
  - Growth Forecast
  - GHG targets
  - 5 Big Moves
  - Data

- Past approaches:
  - Sketch planning
  - EIR alternatives

Mobility Hubs

- Define a regional mobility hub network
- Identify mobility hub typologies and travel sheds
- Examine opportunities for more supportive land uses
Other Policies

- Parking management
- Curb management
- Dedicated space for shared mobility
- Data sharing
- TDM ordinances or trip caps

Next Steps/Discussion

- Framework in November
  - 5 Big Move concepts
  - Programs and policies
- Plan development in 2020
- Plan adoption in 2021

- To learn more, visit sdforward.com/fivebigmoves