2020 Census Outreach Update

CBO Working Group Item # | July 16, 2020

U.S. Census Bureau Timeline
Activity Locations
Reported through June 30, 2020

Hard to Count Community (HTC) Impressions

<table>
<thead>
<tr>
<th>Hard to Count Community (HTC)</th>
<th>Impressions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Immigrants &amp; Refugees</td>
<td>1,280,092</td>
</tr>
<tr>
<td>Asian-Americans &amp; Pacific Islanders (AAPI)</td>
<td>1,058,409</td>
</tr>
<tr>
<td>Limited-English Proficient Individuals and Families</td>
<td>393,135</td>
</tr>
<tr>
<td>Latinos</td>
<td>314,485</td>
</tr>
<tr>
<td>Seniors/Older Adults</td>
<td>230,755</td>
</tr>
<tr>
<td>Lesbian, Gay, Bisexual, Transgender, and Questioning (LGBTIQ)</td>
<td>128,132</td>
</tr>
<tr>
<td>Middle-Eastern and North Africans (MENA)</td>
<td>44,054</td>
</tr>
<tr>
<td>Low Broadband subscription rates and limited or no access</td>
<td>39,328</td>
</tr>
<tr>
<td>African-Americans</td>
<td>31,040</td>
</tr>
<tr>
<td>Veterans</td>
<td>13,360</td>
</tr>
<tr>
<td>Homeless Individuals and Families</td>
<td>9,959</td>
</tr>
<tr>
<td>Farmworkers</td>
<td>2,934</td>
</tr>
<tr>
<td>People with Disabilities</td>
<td>2,231</td>
</tr>
<tr>
<td>Native Americans &amp; Tribal Communities</td>
<td>1,789</td>
</tr>
</tbody>
</table>

Source: SANDAG, California Health Care Foundation, USC ISS, LA Community Foundation, California Health Care Foundation, and the California Data Collaborative.
Language Impressions
Reported Through June, 2020

<table>
<thead>
<tr>
<th>Language</th>
<th>Impressions</th>
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</thead>
<tbody>
<tr>
<td>Spanish</td>
<td>185,783</td>
</tr>
<tr>
<td>Mandarin</td>
<td>89,119</td>
</tr>
<tr>
<td>Vietnamese</td>
<td>36,363</td>
</tr>
<tr>
<td>Chinese</td>
<td>18,150</td>
</tr>
<tr>
<td>Arabic</td>
<td>6,652</td>
</tr>
<tr>
<td>Tagalog</td>
<td>3,127</td>
</tr>
<tr>
<td>Cantonese</td>
<td>1,816</td>
</tr>
<tr>
<td>Farsi</td>
<td>921</td>
</tr>
<tr>
<td>Hmong</td>
<td>364</td>
</tr>
<tr>
<td>Other_Language(s)</td>
<td>229</td>
</tr>
<tr>
<td>Filipino</td>
<td>102</td>
</tr>
<tr>
<td>Japanese</td>
<td>40</td>
</tr>
<tr>
<td>Korean</td>
<td>20</td>
</tr>
<tr>
<td>Hindi</td>
<td>5</td>
</tr>
<tr>
<td>Armenian</td>
<td>1</td>
</tr>
<tr>
<td>Russian</td>
<td>1</td>
</tr>
</tbody>
</table>

Self-Response Rates
As of July 13, 2020

- Poway: 78.4%
- Carlsbad: 73.5%
- San Marcos: 71.0%
- Santee: 69.8%
- La Mesa: 69.4%
- Encinitas: 68.7%
- Oceanside: 68.5%
- San Diego: 68.0%
- El Cajon: 67.9%
- Chula Vista: 67.8%
- Escondido: 67.7%
- Lemon Grove: 66.9%
- Vista: 65.9%
- Solana Beach: 64.7%
- National City: 63.1%
- Imperial Beach: 60.3%
- Coronado: 58.5%
- Del Mar: 53.7%

Countywide 67.8%
Statewide 63.2%
Nationwide 62.0%
Response Rates

Count everyone once, only once, and in the right place

my2020census.gov
Spanish: 844-468-2020
English: 844-330-2020

Darlanne Hoctor Mulmat
darlanne.mulmat@sandag.org
Regional Plan and Transportation Projects: State and Federal Laws

- Climate change and air quality: greenhouse gas emissions, smog, localized air pollution
- Social equity: compliance with federal civil rights requirements (Title VI) and environmental justice considerations
- SB 743: shift to vehicle miles traveled to evaluate impacts of transportation projects
Learning from the COVID-19 Crisis: Re-envisioning Transportation Investments

COVID-19 Impacts Many Aspects of the Lives and Communities in our Region
All Impacts as a result:
Impact of COVID-19 Pandemic and Economic Crisis

Unemployment
Population and Employment in the San Diego Region

Impact of COVID-19 on Employment in the San Diego Region

March 7, 2020 3.3% Avg
May 9, 2020 25.0% Avg
June 27, 2020 14.3% Avg

Unemployment Estimates
Number of Unemployed and Rate

Impact of COVID-19 Pandemic and Economic Crisis
Economic Sectors

Source: Applied Geographic Solutions, Inc., Thousand Oaks, California, Weekly Release July 6, 2020
San Diego Region Employment by Key Economic Sector

- Tourism: 13%
- Innovation: 10%
- Military: 8%
- Healthcare: 9%
- Education: 7%
- Government: 16%
- Retail: 16%
- Finance, Insurance, Real Estate: 5%
- Manufacturing: 3%
- Construction: 2%
- Transportation: 27%

High Impact (31%): Tourism, Retail, Transportation
Moderate Impact (32%): Healthcare, Education, Government, Manufacturing
Low Impact (37%): Innovation, Military, Finance, Insurance, Real Estate, Construction

Supporting Sectors:
- Health Care
- Education
- Government

Driving Sectors:
- Tourism
- Innovation
- Military

Traditional Sectors:
- Retail/Wholesale Trade
- Professional
- Construction
- Manufacturing
- Transportation & Utilities

Index 2007 = 100

This forecast assumes about a loss of 100,000 jobs in 2020 resulting in 9% unemployment rate.

Source: CA Employment Development Department (EDD), Labor Market Information Division, Quarterly Census of Employment and Wages, SANDAG
COVID-19 Impacts to Local Industries

High-Contact Intensity Occupations
San Diego Region Employment by Race and Ethnicity and Frontline Workers

Share of ethnic group in selected industries relative to their share of all employed residents

<table>
<thead>
<tr>
<th>Industry</th>
<th>Under-represented</th>
<th>Over-represented</th>
</tr>
</thead>
<tbody>
<tr>
<td>Non-essential</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Personal Care</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Food Service</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Retail</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Grocery, Convenience, and Drug Stores</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Child Care and Social Services</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Health Care</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Other frontline</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>


Impact of COVID-19 Pandemic and Economic Crisis

Small Business
Impacts to Small Business in San Diego Region

Change in Revenue in the Last Week
- Decreased Revenue in the Last Week
- Increased Revenue in the Last Week

Change in Paid Employees in the Last Week
- Decreased Number of Paid Employees in the Last Week
- Increased Number of Paid Employees in the Last Week

Source: U.S. Census Small Business Pulse Survey, Week Ending June 27, 2020

COVID-19 Impact on Small Business in San Diego Region

Overall, how has this business been affected by the COVID-19 pandemic?
- Little to No Effect: 15%
- Large & Moderate Positive Effect: 3%
- Large & Moderate Negative Effect: 82%

Since March 13, 2020, has this business requested financial assistance from any of the following sources? Select all that apply:
- Paycheck Protection Program: 73%
- Economic Injury Disaster Loans: 25%
- Not requested financial assistance from any source since March 13, 2020: 20%

*Some small businesses applied for both PPP and Economic Injury Disaster Loans

Source: U.S. Census Small Business Pulse Survey, Week Ending June 27, 2020
Impact of COVID-19 Pandemic and Economic Crisis

Taxable Sales

Impact of Recessions on Taxable Sales

- "Moderate" Recession
- "Mild" Recession
- "Severe" Recession

Down 13%

6 ½ years to recover to 2007 level
COVID-19 Impact on San Diego Region
Taxable Retail Sales

Impact of COVID-19 Pandemic and Economic Crisis
Communities
Communities Most Impacted as of May 30
An assessment of communities most impacted by both COVID-19 cases and unemployment

- 91910 (Chula Vista N)
- 91911 (Chula Vista S)
- 91917 (Dulzura)
- 91932 (Imperial Beach)
- 91950 (National City)
- 91977 (Spring Valley)
- 92020 (El Cajon)
- 92021 (El Cajon)
- 92102 (Golden Hill)
- 92113 (City Heights)
- 92114 (Encanto)
- 92115 (College)
- 92139 (Paradise Hills)
- 92154 (Nestor)
- 92173 (San Ysidro)

COVID-19 Cases and Estimated Unemployment by Race and Ethnicity

- Black
  - County: 21.6%
  - COVID: 44.5%
- Hispanic
  - County: 27.9%
  - COVID: 42.0%
- White
  - County: 29.9%
  - COVID: 14.4%
- Asian
  - County: 19.1%
  - COVID: 24.2%
Impact of COVID-19 and Unemployment by Race and Ethnicity in the San Diego Region

Unemployment: 67% Black, 44% Hispanic, 32% Asian, 45% White
COVID-19 Cases: 70% Black, 49% Hispanic, 18% Asian, 42% White
Unemployment and COVID-19 Cases: 70% Black, 42% Hispanic, 24% Asian, 14% White

Source: SANDAG Annual Estimates 2019; Applied Geographic Solutions, Inc., Thousand Oaks, California; County of San Diego, Health and Human Services Agency
SANDAG is monitoring key variables to determine how far each one is from returning back to normal (pre-COVID levels).

<table>
<thead>
<tr>
<th>Foot traffic by type of business</th>
<th>Pre-Covid</th>
<th>March</th>
<th>April</th>
<th>May</th>
<th>June</th>
<th>July</th>
</tr>
</thead>
<tbody>
<tr>
<td>Supermarket</td>
<td>100%</td>
<td>100%</td>
<td>123%</td>
<td>92%</td>
<td>75%</td>
<td>68%</td>
</tr>
<tr>
<td>Apparel stores</td>
<td>100%</td>
<td>96%</td>
<td>81%</td>
<td>35%</td>
<td>23%</td>
<td>22%</td>
</tr>
<tr>
<td>New car dealers</td>
<td>100%</td>
<td>93%</td>
<td>84%</td>
<td>55%</td>
<td>48%</td>
<td>44%</td>
</tr>
<tr>
<td>Building material and supply</td>
<td>100%</td>
<td>95%</td>
<td>93%</td>
<td>72%</td>
<td>73%</td>
<td>54%</td>
</tr>
<tr>
<td>Home garden and equipment</td>
<td>100%</td>
<td>95%</td>
<td>93%</td>
<td>72%</td>
<td>72%</td>
<td>69%</td>
</tr>
<tr>
<td>Personal care services</td>
<td>100%</td>
<td>94%</td>
<td>91%</td>
<td>75%</td>
<td>75%</td>
<td>68%</td>
</tr>
<tr>
<td>Golf Courses and Country Clubs</td>
<td>100%</td>
<td>90%</td>
<td>74%</td>
<td>41%</td>
<td>30%</td>
<td>32%</td>
</tr>
<tr>
<td>Fitness and Recre. Sports Centers</td>
<td>100%</td>
<td>99%</td>
<td>84%</td>
<td>36%</td>
<td>24%</td>
<td>23%</td>
</tr>
<tr>
<td>Airport</td>
<td>100%</td>
<td>96%</td>
<td>80%</td>
<td>40%</td>
<td>15%</td>
<td>10%</td>
</tr>
<tr>
<td>Restaurants</td>
<td>100%</td>
<td>99%</td>
<td>70%</td>
<td>13%</td>
<td>0%</td>
<td>0%</td>
</tr>
<tr>
<td>Hotels</td>
<td>100%</td>
<td>91%</td>
<td>90%</td>
<td>72%</td>
<td>71%</td>
<td>65%</td>
</tr>
<tr>
<td>Other</td>
<td>100%</td>
<td>90%</td>
<td>89%</td>
<td>87%</td>
<td>86%</td>
<td>85%</td>
</tr>
<tr>
<td>Restaurant reservations</td>
<td>100%</td>
<td>99%</td>
<td>70%</td>
<td>13%</td>
<td>0%</td>
<td>0%</td>
</tr>
</tbody>
</table>

Source: SANDAG based on Applied Geographic Solutions, Inc., Thousand Oaks, California; Caltrans PeMS, Google mobility, SafeGraph COVID-19 Response Dataset - Weekly Patterns.

Possible lasting effects beyond 2026:
- Discouraged workers leaving the workforce
- Educational disruptions (Students dropping out rates)
- Less investment in the capital stock
- Existing capital less productive given restrictions
- Real estate, Commercial Leasing

Shape of the recovery:
- V ruled out – passed that stage
- No return to “normal” before a vaccine is available
- V long or U long depending on future closures
Impact of COVID-19 Pandemic and Economic Crisis

Transportation

Transit Ridership

2020 decrease in ridership (compared to 2019)

<table>
<thead>
<tr>
<th>Service</th>
<th>March</th>
<th>April</th>
<th>May</th>
</tr>
</thead>
<tbody>
<tr>
<td>Trolley</td>
<td>-120.00%</td>
<td>-100.00%</td>
<td>-80.00%</td>
</tr>
<tr>
<td>MTS Buses</td>
<td>-60.00%</td>
<td>-40.00%</td>
<td>-20.00%</td>
</tr>
<tr>
<td>COASTER</td>
<td>0.00%</td>
<td>0.00%</td>
<td>0.00%</td>
</tr>
<tr>
<td>SPRINTER</td>
<td>0.00%</td>
<td>0.00%</td>
<td>0.00%</td>
</tr>
<tr>
<td>BREEZE</td>
<td>0.00%</td>
<td>0.00%</td>
<td>0.00%</td>
</tr>
</tbody>
</table>
Essential Workers Depend on Transit

- 20% of people who ride transit to work have no vehicles available
- 79% of people who ride transit to work travel 30 minutes or longer
- The median transit travel time is 51 minutes, which is double the travel time for people who drive to work

Travel Around the San Diego Region Survey: Public Transit

- 42% of survey respondents reported that they used transit before and after COVID-19
- 36% said they did not use transit before and will not in the future
- 18% did not use transit before but stated they would after COVID-19
- 4% said they used transit before but not after COVID-19
Freeway Travel Trends

Average Decreases in Daily Traffic Volumes at Freeway Hotspots in the San Diego Region (2019 to 2020)

- March - April: -27%, -43%, -42%, -60%
- April - May: -42%, -40%, -33%, -31%
- May - June: -29%, -25%, -23%, -21%
- June - July: -26%, -17%, -16%, -18%

Source: Performance Measurement System (PeMS), Caltrans

Vehicle Miles Traveled

Percent Change VMT 2019 to 2020

- Month 1: -44%
- Month 2: -40%
- Month 3: -30%
- Month 4: -22%
Border Crossing Volumes

Northbound Pedestrian Crossings
May 2020:
-65%
below monthly average (Jan 2019-Feb 2020)
increase from April 2020 to May 2020:
+44%

Northbound POV Crossings
May 2020:
-44%
below monthly average (Jan 2019-Feb 2020)
increase from April 2020 to May 2020:
+17%

Note: Monthly averages are for Jan 2019-Feb 2020 period. Travel restrictions at the border were implemented in March 2020. Source: U.S. Customs and Border Protection (CBP).

Travel Around the San Diego Region
Survey: Vehicle Travel and Telework

- 89% reported driving less during the health crisis
  - 81% expect their vehicle travel to increase over the next six months
- 78% reported using online shopping and delivery more
  - 42% expect to continue at a higher rate
- 48% reported driving less for work because of telework
  - About half of those who teleworked said they saw it continuing
Employer Telework Trends During the COVID-19 Health Crisis

Of the 137 employers surveyed 55% said they have had employees who have teleworked during the COVID-19 health crisis.

When asked if they would offer telework after COVID-19:
- 26% said yes
- 46% said no
- 28% said maybe

Employers' Future Telework Plans

When asked what percent of their workforce would continue to telework, the most common response was less than 25%.

Of those companies who said they would offer telework post-COVID-19, 9% said they would offer it full-time.

The most common response (71%) was to offer telework 2-3 times a week.
Employers' Top 5 Reasons for Offering Telework

- Increased job satisfaction (67%)
- Productivity (55%)
- Improved work / life balance (55%)
- Helping the environment (50%)
- Cost savings in leasing commercial space (30%)

What is the Potential for Telework in the San Diego Region?

61% of occupations are not conducive to telework

64% of occupations are considered essential jobs
  - 42% of essential jobs are not conducive to telework
Jobs that Can be Done at Home Typically Earn Higher Wages

Who Teleworks in San Diego Region?
Telework Targets in Regional Plans

<table>
<thead>
<tr>
<th>Telework Type</th>
<th>2011 RP</th>
<th>2015 RP</th>
<th>2019 RTP</th>
<th>Proposed 2021 RP</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>0%</td>
<td>10%</td>
<td>15%</td>
<td>30%</td>
</tr>
<tr>
<td></td>
<td>5%</td>
<td>15%</td>
<td>20%</td>
<td></td>
</tr>
<tr>
<td></td>
<td>10%</td>
<td>20%</td>
<td>25%</td>
<td></td>
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<tr>
<td></td>
<td>15%</td>
<td>30%</td>
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<tr>
<td></td>
<td>25%</td>
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</tr>
<tr>
<td></td>
<td>30%</td>
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</tbody>
</table>

- **2035**
- **2050**

Broadband Connectivity and Internet Access

- **23%** of households earning less than $50,000/year do not have a broadband subscription
- **20 – 40%** of students in many local districts are under-connected or lack home internet access
- **42%** of people who lived in the County’s rural areas had fixed internet, versus **97%** of the people who live in urban areas
Travel Around the San Diego Region Survey: Active Transportation

- **14%** are biking more
  - 85% will continue biking more for recreation, exercise, shopping and errands

- **50%** are walking more
  - 82% will continue walking more for recreation, exercise, shopping and errands

Cycling on the Rise in the Region

- 91% increase in bike volumes on eight regional bikeway corridors
- Data collected May 2020 and compared to May 2019 volumes
Cycling on the Rise in the Region

- San Marcos Inland Rail Trail +121%
- Solana Beach Coast Highway +109%
- Rose Canyon Bike Path +107%
- Chula Vista Bayshore Bikeway +158%

University Avenue +88%
4th & 5th Avenues +63%
Landis Street +52%
30th Street +54%

Source: SANDAG Eco-Counters

Shared Streets

- SANDAG Shared Streets Pilot Program awarded $95,000 to 11 jurisdictions to create safe spaces for biking, walking, scooting, and more

Source: SidewalkStarts
Next Steps

• Presentation of "What we are Learning from COVID and How It Could Impact Transportation Planning":
  – July 17, 2020: Transportation, Regional Planning and Borders Committee (Joint Meeting)
  – July 24, 2020: Board of Directors

• Presentation of the vision for the 2021 Regional Plan:
  – August 7, 2020: Transportation, Regional Planning and Borders Committee (Joint Meeting)
  – August 14, 2020: Board of Directors