Plan Bay Area established a regional vision for transportation, land use, and housing in the 21st century.
Yet sometimes we spend too much time forecasting.

** Not an actual travel demand model.
Vital Signs seeks to track implementation of sustainability objectives in the region.
Vital Signs seeks to track implementation of sustainability objectives in the region.
ANALYSES CONDUCTED

1. Regional Performance
2. Local Focus
3. National Context
NATIONAL CONTEXT: TOP 10 METROS

New York MSA
19.9 million residents

Los Angeles MSA
13.1 million residents

Chicago MSA
9.5 million residents

Dallas MSA
6.8 million residents

Houston MSA
6.3 million residents

Philadelphia MSA
6.0 million residents

Washington MSA
5.9 million residents

Miami MSA
5.8 million residents

Atlanta MSA
5.5 million residents
Greenfield Development Since 1990

Click on an area of the map to see when it was developed.
1. Regional commute **mode shares and commute times have remained remarkably stable** over the past few decades.

2. When compared to other metros, the Bay Area has higher-than-average levels of freeway congestion but has the most reliable freeway travel times — in other words, we are “reliably congested”.

3. While total regional transit ridership is increasing, **per capita transit use has decreased over time**.

4. Only **in the last few years has the trend of suburbanization finally been counteracted** by growth in cities ringing San Francisco Bay.

5. The **boom years for Bay Area development may be behind us**, as regional population growth and housing production have slowed considerably in recent decades.
COMMUTE MODE CHOICE: REGIONAL PERFORMANCE

Source: US Census/American Community Survey
COMMUTE TIME: REGIONAL PERFORMANCE

Source: US Census/American Community Survey
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TIME SPENT IN CONGESTION:
REGIONAL PERFORMANCE

Sources: INRIX/Iteris/MTC, 2013; Texas Transportation Institute, 2011
Delay from Congestion

Source: Texas Transportation Institute, 2011
Buffer Time Index

Source: Texas Transportation Institute, 2011
TOP 10 KEY FINDINGS

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Average Daily

TRANSIT RIDERSHIP: REGIONAL PERFORMANCE

Source: FTA NTD, 2013 (including 2014 preliminary data)
Annual Per-Capita

Per-Capita Annual Transit Boardings

Best fit line of per-capita ridership trend

Source: FTA NTD, 2013 (including 2014 preliminary data)
Source: FTA NTD, 2013 (including 2014 preliminary data); Golden Gate ridership estimate not available for 2014
PER-CAPITA TRANSIT BOARDINGS BY OPERATOR

Source: FTA NTD, 2013 (including 2014 preliminary data); Golden Gate ridership estimate not available for 2014
% CHANGE IN PER-CAPITA TRANSIT BOARDINGS BY METRO AREA SINCE 1991

- New York
- Miami
- Los Angeles
- Philadelphia
- Washington
- Bay Area
- Chicago
- Dallas
- Houston
- Atlanta

Source: FTA NTD, 2013 (including 2014 preliminary data)
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POPULATION BY GEOGRAPHICAL AREA

Unincorporated: 10%
Inland, Coastal, and Delta: 25%
Bayside: 35%
Oakland: 5%
San Francisco: 11%
San Jose: 13%

Source: California Department of Finance
POPULATION: REGIONAL PERFORMANCE

POPULATION BY GEOGRAPHICAL AREA

- **Unincorporated**: 16% (10%)
- **Inland, Coastal, and Delta**: 12% (25%)
- **Bayside**: 38% (35%)
- **Big Three**: 33% (30%)

Source: California Department of Finance
HOUSING GROWTH: REGIONAL PERFORMANCE

HOUSING STOCK BY CATEGORY

PERMITTED UNITS BY CATEGORY

Source: Construction Industry Research Board (1990-2010); California Homebuilding Foundation (2011-2013)
TOP 10 KEY FINDINGS

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Housing Growth: Regional Performance

Permitted Units by Year

Source: Construction Industry Research Board (1967-2010); California Homebuilding Foundation (2011-2013)
Source: Construction Industry Research Board (1967-2010); California Homebuilding Foundation (2011-2013)
Source: U.S. Census Bureau [note: Bay Area reflects two primary MSAs – San Francisco MSA + San Jose MSA]
6. The region is continuing to **shift towards multi-family development** as evidenced by five of the nine counties permitting more multi-family than single-family units.

7. Despite growing economic output, the region faces major challenges due to **stagnant incomes, increasing poverty, and rising housing costs**.

8. Existing homeowners have reaped the rewards of a booming housing market, while **renters and aspiring homeowners face an array of less-than-desirable options**.

9. Even with the obstacles posed by unaffordability and inequality, the **Bay Area has emerged from the Great Recession stronger than almost any other major metro area**.

10. The Bay Area’s greatest successes have been related to the natural and built environments: **our air is cleaner, our roads are safer, and our Bay is healthier** than in decades past.
HOUSING GROWTH: REGIONAL PERFORMANCE

Source: Construction Industry Research Board (1990-2010); California Homebuilding Foundation (2011-2013)
## Sub-County Geography

<table>
<thead>
<tr>
<th>Sub-County Geography</th>
<th>Permitted Single-Family Units</th>
<th>Permitted Multi-Family Units</th>
<th>Total Permitted Units</th>
<th>% Multi-Family Permits</th>
</tr>
</thead>
<tbody>
<tr>
<td>San Francisco</td>
<td>2,300</td>
<td>45,200</td>
<td>47,500</td>
<td>95%</td>
</tr>
<tr>
<td>Northern Alameda</td>
<td>7,200</td>
<td>18,300</td>
<td>25,500</td>
<td>72%</td>
</tr>
<tr>
<td>San Jose</td>
<td>19,800</td>
<td>48,100</td>
<td>67,900</td>
<td>71%</td>
</tr>
<tr>
<td>Central San Mateo</td>
<td>2,800</td>
<td>5,300</td>
<td>8,000</td>
<td>65%</td>
</tr>
<tr>
<td>Northern Santa Clara</td>
<td>15,200</td>
<td>20,300</td>
<td>35,500</td>
<td>57%</td>
</tr>
<tr>
<td>Northern San Mateo</td>
<td>3,500</td>
<td>4,100</td>
<td>7,600</td>
<td>54%</td>
</tr>
<tr>
<td>Southern San Mateo</td>
<td>3,700</td>
<td>3,000</td>
<td>6,600</td>
<td>45%</td>
</tr>
<tr>
<td>Bay Area Average</td>
<td>269,000</td>
<td>215,400</td>
<td>484,400</td>
<td>44%</td>
</tr>
</tbody>
</table>

Source: Construction Industry Research Board (1967-2010); California Homebuilding Foundation (2011-2013)
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ECONOMIC OUTPUT: REGIONAL PERFORMANCE

% CHANGE SINCE 2001

Sources: Bureau of Economic Analysis – Regional Economic Accounts (inflation-adjusted to 2013 dollars); California Employment Development Department; California Department of Finance
INCOME: REGIONAL PERFORMANCE

Sources: U.S. Census; American Community Survey (inflation-adjusted) [note: Census & ACS income methodologies have slight differences]
POVERTY: REGIONAL PERFORMANCE

SHARE OF PEOPLE LIVING IN POVERTY – BAY AREA

- Below twice the national poverty level
- Below the national poverty level

U.S. poverty rate in 2013

Source: American Community Survey (2005-2013); U.S. Census Bureau (1980-2000)
HOME PRICES: REGIONAL PERFORMANCE

MEDIAN HOME PRICE – BAY AREA

Source: Redfin.com for Single-Family Homes, Condos, and Townhomes (1990- October 2014); inflation-adjusted to $2014
TOP 10 KEY FINDINGS

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RENTS:
REGIONAL PERFORMANCE

MEDIAN REGIONAL MONTHLY RENT

$1,600
$1,400
$1,200
$1,000
$800
$600
$400
$200
$0

Inflation-Adjusted
(in 2013 dollars)

Not Inflation-Adjusted
(in current dollars)

Sources: U.S. Census Bureau/American Community Survey
Share of Household Income Spent on Housing: Renters

Source: US Census/American Community Survey [note: income does not include housing subsidies]
Share of Household Income Spent on Housing: Owners

Source: US Census/American Community Survey [note: income does not include housing subsidies; downpayment considered to be one-time expense]
TOP 10 KEY FINDINGS

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PER-CAPITA GROSS REGIONAL PRODUCT BY METRO AREA

Source: Bureau of Economic Analysis – Regional Economic Accounts (inflation-adjusted to 2013 dollars)
MEDIAN HOUSEHOLD INCOME BY METRO AREA

Sources: U.S. Census, American Community Survey (inflation-adjusted) [note: Census & ACS income methodologies have slight differences]
SHARE OF HOUSEHOLDS SPENDING AT LEAST 35% OF INCOME ON HOUSING BY METRO AREA

Source: US Census/American Community Survey [note: income does not include housing subsidies]
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PARTICULATE MATTER: REGIONAL PERFORMANCE

Annual Average

Fine Particulate Concentrations (µg/m³)

Source: BAAQMD Air Quality Sensors, 2014; regional data measures average concentration of 8 longstanding sensors with iterated 2-way ANOVA for interpolation
OZONE:
REGIONAL PERFORMANCE

Source: BAAQMD Air Quality Sensors, 2014; all measures reflect 8-hour peak concentration on 4th worst day of the year
Modal Breakdown

FATALITIES FROM CRASHES: REGIONAL PERFORMANCE

Source: CHP SWITRS, 2012
INJURIES FROM CRASHES: REGIONAL PERFORMANCE

NUMBER OF SEVERE INJURIES RESULTING FROM COLLISIONS WITH VULNERABLE USERS


MOTORISTS + MOTORCYCLISTS
BICYCLISTS
PEDESTRIANS

Sources: CHP SWITRS, Caltrans HPMS, U.S. Census Bureau (2001-2012)
BAY RESTORATION: REGIONAL PERFORMANCE

NET INCREASE IN SAN FRANCISCO BAY SURFACE AREA SINCE 1969

Source: BCDC Annual Report, 2013
BRIEF TOUR OF THE VITAL SIGNS WEBSITE
Quickly select performance indicators from the measures grid

vitalsigns.mtc.ca.gov

Measures

Now it’s your turn to explore our region’s Vital Signs! Each of the measure boxes below is associated with one of the four matching-color categories shown above them — transportation, land use, the economy, and the environment.

FILTER BY:

- All
- Transportation
- Land Use
- Economy
- Environment

- Bridge Condition
- Commute Mode Choice
- Commute Patterns
- Commute Time
- Daily Miles Traveled
- Highway Pavement Condition
- Miles Traveled in Congestion

- Street Pavement Condition
- Time Spent in Congestion
- Traffic Volumes at Regional Gateways
- Transit Asset Condition
- Transit Ridership
- Transit System Efficiency
- Travel Time Reliability
Explore interactive maps and zoom into your local neighborhood

2013 Commute Mode Choice for Counties and Cities

Top Cities for Carpool
1. San Pablo: 22.0%
2. Calistoga: 19.9%
3. Pittsburg: 18.9%
4. Hercules: 17.7%
5. Richmond: 17.6%
6. Colma: 17.3%
7. Vallejo: 16.0%
8. Gilroy: 15.4%
9. Antioch: 15.5%
10. Postal: 15.4%

Street Pavement Condition

Pavement conditions vary widely—not only from street to street, but also from city to city.

Pavement in the region’s three largest cities – San Jose, San Francisco, and Oakland – falls squarely into the “fair” range of the PCI scale. This performance level is not unique to the largest jurisdictions; most Bay Area cities have PCIs ranging between 60 and 79 (reflecting fair-to-good conditions). Some suburban communities have seen major improvements in their pavement condition over the last year – in San Mateo County alone, Menlo Park, Woodside and Colma all experienced three-point improvements in PCI in 2013.

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National Context

In terms of generating transit ridership, the San Francisco Bay Area is being outpaced by its peers.

While the Bay Area remains one of the nation’s most transit-oriented metro areas, New York, Chicago, Philadelphia and Miami have all experienced notable growth in overall and per-capita ridership since 2002. In that same time, the Bay Area has seen declines in both measures – a 3 percent slide in total ridership and a 10 percent decline on a per-capita basis. The only metros with greater declines in ridership than the Bay Area were Houston, Dallas and Atlanta.

Read More

Regional Performance

Bay Area bridge conditions have significantly improved over the past decade.

Bay Area bridges and overpasses are in their best shape since 1999, thanks to substantial efforts to improve the seismic and structural safety of these critical facilities. In 2012, the share of bridges flagged as structurally deficient fell by two percentage points – and now stands at just 15 percent.

Read More
Download every dataset from the Data Center

Data Center
Explore a wide variety of public datasets related to transportation, land use, the economy, and the environment. Select one or all of the datasets aggregated and refined for the Vital Signs initiative—then download them and start your own analyses of Bay Area trends!

Transportation

- Bridge Condition
- Commute Patterns
- Daily Miles Traveled
- Miles Traveled in Congestion
- Time Spent in Congestion
- Transit Asset Condition
- Transit System Efficiency
- Commute Mode Choice
- Commute Time
- Highway Pavement Condition
- Street Pavement Condition
- Traffic Volumes at Regional Gateways
- Transit Ridership
- Travel Time Reliability

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Housing Growth by City and Unincorporated Area by Decade

<table>
<thead>
<tr>
<th>Top Cities and Unincorporated Areas for Permitted Units 2010 through 2013</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. San Francisco: 2,800 units/year</td>
</tr>
<tr>
<td>2. San Jose: 2,700 units/year</td>
</tr>
<tr>
<td>3. Dublin: 700 units/year</td>
</tr>
<tr>
<td>4. Unincorporated Contra Costa County: 560 units/year</td>
</tr>
<tr>
<td>5. Sunnyvale: 540 units/year</td>
</tr>
</tbody>
</table>

Average number of units: 696.3 per year
Home Prices by Year - 2014

Zoom in to see more details, including individual home sales. Click on a shape on the map for more information.
The median monthly rent payment of Census Tract 11902 in 2013 was $1,317.

**Lowest Rents**
1. Woodside: $874
2. Calistoga: $961
3. San Pablo: $980
4. Oakland: $1,001
5. Rio Vista: $1,017

**Highest Rents**
Atherton, Belvedere, Clayton, Cupertino, Danville, Hillsborough, Los Altos Hills, Orinda, Portola Valley, Ross, Tiburon: above $2,000

**Median Monthly Rent**
- Tract 11902
- San Francisco
- San Francisco County
- Bay Area

© Mapbox © OpenStreetMap Improve this map, CartoDB attribution
1 killed in November 2002

Location:
ALMA ST at EVERETT AV

City:
PALO ALTO

County:
SANTA CLARA

Time of day:
9:00 PM

Pedestrians killed:
1

Bicyclists killed:
0

Motorists killed:
0
TRANSPORTATION DATA: NOW AVAILABLE!

LAND & PEOPLE DATA: NOW AVAILABLE!

ECONOMY DATA: NOW AVAILABLE!

ENVIRONMENT DATA: NOW AVAILABLE!

VITAL SIGNS

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