E-TOD: A National Perspective

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Rail-Volution
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Presentation Overview

- National trends
- SF Bay Area region
- Hartford-Springfield region

Closing thoughts
National Trends
## Patterns of “Job Sprawl”

### Highly Decentralized Regions

<table>
<thead>
<tr>
<th>Large Metro Area</th>
<th>% of jobs beyond 10 miles of CBD</th>
</tr>
</thead>
<tbody>
<tr>
<td>Detroit</td>
<td>77.4%</td>
</tr>
<tr>
<td>Chicago</td>
<td>68.7%</td>
</tr>
<tr>
<td>Dallas</td>
<td>66.9%</td>
</tr>
<tr>
<td>Los Angeles</td>
<td>65.6%</td>
</tr>
<tr>
<td>Philadelphia</td>
<td>63.7%</td>
</tr>
</tbody>
</table>

### More Centralized Regions

<table>
<thead>
<tr>
<th>Large Metro Area</th>
<th>% of jobs within 3 miles of CBD</th>
</tr>
</thead>
<tbody>
<tr>
<td>Virginia Beach</td>
<td>36.4%</td>
</tr>
<tr>
<td>New York</td>
<td>34.8%</td>
</tr>
<tr>
<td>Salt Lake City</td>
<td>32.8%</td>
</tr>
<tr>
<td>Las Vegas</td>
<td>29.9%</td>
</tr>
<tr>
<td>Boston</td>
<td>28.0%</td>
</tr>
</tbody>
</table>

### Average Commute Times, 1980-2000

- **Source:** Pisarski, A. “Commuting in America III,” Transportation Research Board, 2006

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Source: Kneebone, E. “Job Sprawl Revisited,” Brookings Institution, April 2009
Jobs Near Transit: Our Methodology

1. National CTOD database
   http://toddata.cnt.org/
   - 4,416 fixed-guideway stations
   - 54 metropolitan areas
   - Sorted by size

2. Local Employment Dynamics, 2002-2009
   http://lehd.ces.census.gov/
   - Employer survey data combined with census data
   - 37 transit regions
   - Excludes Washington, D.C.; Boston, MA
1 in 5 jobs are located in transit zones

Share of Regional Jobs in Transit Zones, by System Size, 2009

Includes 37 new and established transit systems and their respective regions.
Source: National TOD Database, 2002 & 2009 LED Work Area Characteristics
Jobs in transit zones grew as regions built new transit

Number of Jobs in Transit Zones, 2002-2009

- Includes 37 new and established transit systems and their respective regions.
- Source: National TOD Database, 2002 & 2009 LED Work Area Characteristics
Transit’s capture of regional jobs correlates to system size

Source: National TOD Database, LED 2009
Certain types of jobs more likely to be in transit zones

Capture of Jobs in Transit Zones by Industry Group, 2009

Includes 37 new and established transit regions.
San Francisco Bay Area
Where are jobs located in the Bay Area?

- 44% within $\frac{1}{4}$ mile of high-quality transit
- 75% within $\frac{1}{2}$ mile of highway off-ramp

Source: NETS, ABAG, Arup
The share of jobs near transit has declined as the region decentralized.

**Capture of Jobs in Transit Zones, 1990-2010**

- 1990: 55%
- 2000: 50%
- 2010: 45%

Source: NETS, ABAG, Strategic Economics
…BUT at the same time “knowledge-based” jobs are concentrated in transit zones

Source: NETS, ABAG, Strategic Economics
Agglomeration benefits for knowledge-based industries

- Access to highly skilled workforce
- “Knowledge spillover” from proximity to similar firms
- Urban amenities for Gen X and Gen Y labor force

Apple campus in Cupertino
Image: GeekWire.com

Twitter HQ in Mid-Market, San Francisco
Image: Sfgate.com

Amazon campus in South Lake Union, Seattle
Image: www.Seattlepi.com
Identifying ETOD opportunities: districts with the right “profile” for transit

Source: NETS, Jon Haveman, Strategic Economics
Industrial and/or suburban districts may require a different strategy

Source: NETS, Jon Haveman, Strategic Economics
Hartford-Springfield
Slow growing region with challenging real estate markets

- Manufacturing
- Insurance
- Health Education
- Construction
- Professional and Business Services

Relative Concentration (LQ)

Historic Growth Rate
Jobs near transit: knowledge-based, education, health, government

Capture of Jobs in Transit Zones by Industry Group

Source: LED, InfoUSA, PVPC, CRCOG, Jonathan Rose Companies, Strategic Economics
Government and anchor institutions

CCSU, New Britain

Source: Dept. of Education – CT, MA, Jonathan Rose Companies, CRCOG, PVPC
Potential to align existing state economic incentives with TOD strategy
Planning ETODs
Final thoughts on planning for ETODs

- Build on the economic strengths of your region
- Map job sectors that can benefit from agglomeration and TOD
- Explore appropriate role for state/regional government beyond building transit
- Integrate health and education institutions into TOD strategy, especially in weak market areas
Questions or Comments

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