METROPOLITAN TRANSPORTATION COMMISSION

Bay Area Metro Center
375 Beale Street
San Francisco, CA 94105

Yerba Buena Conference Room, 1st Floor

MEETING AGENDA

Date: Thursday, October 29, 2026 | **Time:** 9 a.m.

Joint MTC-ABAG Workshop

Chair: Sue Noack
Vice Chair: Stephanie Moulton-Peters
Clerk: Kimberly Ward

Day 2 of the Metropolitan Transportation Commission Workshop is scheduled to be held on Wednesday, October 29, 2026 at 9:00 a.m. at the Bay Area Metro Center, 375 Beale Street, San Francisco, CA 94105

Meeting attendees may opt to attend in person for public comment and observation. Attendees must adhere to posted public health protocols while in the building. A recording of the workshop will be made available at https://mtc.ca.gov---/meetings-events.

Members of the public may submit comments by email at info@bayareametro.gov by 5:00 p.m. two (2) business days before the scheduled meeting date. Please include the committee or board meeting name in the subject line. All comments received will be submitted into the record. The Chair may adjust the order and timing of all agenda items.

Roster

Sue Noack
Chair

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Gina Papan
Candace Andersen
Marilyn Ezzy Ashcraft
Alicia John-Baptiste
Amber Manfree
Nate Miley
Belia Ramos

**Non-Voting Members*

Agenda

1. Welcome

1a. **Welcome** 26-2205

Information item

Action: Welcome

Presenter(s): MTC Chair Sue Noack , ABAG President Susan Adams , MTC Executive Director Andrew Fremier

2. Plan Bay Area 2060 Kickoff

2a. **Plan Bay Area 2060 Kickoff and The Bay Area Today** 26-2199

Kick off Plan Bay Area 2060 and provide an overview of the long-range regional planning process and foundational, data-driven context on existing conditions in the Bay Area.

Action: Information

Presenter(s): Michael Meehan, Anup Tapase

Attachments:

- 2a_26-2199_1_Day_2_Item_2_Summary_Sheet_Plan_Bay_Area_2060_kickoff.pdf
- 2a_26-2199_2_Day_2_Item_2_Attachment_A_Presentation_PBA_2060_Kickoff_and_The_Bay_Area_Today_FIN_X.pdf
- 2a_26-2199_3_Day_2_Item_2_Attachment_B_PBA_2060_Detailed_Timeline_Overview.pdf

3. Moderated Expert Panel and Discussion

3a. **Moderated Expert Panel and Discussion** 26-2208

Following the staff presentation, the Commission and the ABAG Executive Board will hear from a moderated panel of regional experts, followed by a facilitated discussion over lunch.

Action: Discussion

Presenter(s): Cecilia Lei (moderator), Ruby Bolaria Shifrin – Terner Labs , Joshua Schank – InfraStrategies/Mineta Transportation Institute, Russell Hancock – Joint Venture Silicon Valley

Attachments:

- 3a_26-2208_1_Day_2_Item_3_Summary_Sheet._Moderated_Expert_Panel_Discussion.pdf
- 3a_26-2208_2_Day_2_Item_3_Attachment_A_Discussion_Worksheet.pdf

4. Closing Remarks

Workshop synthesis delivered by Janette S. Williams, The Centre for Organization Effectiveness

5. Public Comment / Other Business

6. Adjournment

The next meetings of the Metropolitan Transportation Commission, Bay Area Housing Finance Authority (BAHFA), Bay Area Toll Authority (BATA), Bay Area Infrastructure Finance Authority (BAIFA), and Bay Area Headquarters Authority are scheduled to be held on Wednesday, November 18, 2026. Any changes to the schedule will be duly noticed to the public.

Public Comment: The public is encouraged to comment on agenda items at meetings by completing a request-to-speak card (available from the Clerk) and passing it to the Clerk. Public comment may be limited by any of the procedures set forth in Section 3.09 of MTC's Procedures Manual (Resolution No. 1058, Revised) if, in the chair's judgment, it is necessary to maintain the orderly flow of business.

Meeting Conduct: If this meeting is willfully interrupted or disrupted by one or more persons rendering orderly conduct of the meeting unfeasible, the Chair may order the removal of individuals who are willfully disrupting the meeting. Such individuals may be arrested. If order cannot be restored by such removal, the members of the meeting body may direct that the meeting room be cleared (except for representatives of the press or other news media not participating in the disturbance), and the session may continue.

Record of Meeting: Meetings are recorded. Copies of recordings are available at a nominal charge, or recordings may be listened to at MTC offices by appointment. Audiocasts are maintained on MTC's Web site (mtc.ca.gov) for public review for at least one year.

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可及性和法令第六章：MTC 根據要求向希望來委員會討論有關事宜的殘疾人士及英語有限者提供服務/方便。需要便利設施或翻譯協助者，請致電 415.778.6757 或 415.778.6769 TDD / TTY。我們要求您在三個工作日前告知，以滿足您的要求。

Acceso y el Titulo VI: La MTC puede proveer asistencia/facilitar la comunicación a las personas discapacitadas y los individuos con conocimiento limitado del inglés quienes quieran dirigirse a la Comisión. Para solicitar asistencia, por favor llame al número 415.778.6757 o al 415.778.6769 para TDD/TTY. Requerimos que solicite asistencia con tres días hábiles de anticipación para poderle proveer asistencia.

Attachments are sent to meeting body members, key staff and others as appropriate. Copies will be available at the meeting.

Metropolitan Transportation Commission-
Association of Bay Area Governments Workshop (Day 2)

October 29, 2026 **Agenda Item 2a-26-2199**

Plan Bay Area 2060 Kickoff and The Bay Area Today

Subject:

Kick off Plan Bay Area 2060 and provide an overview of the long-range regional planning process and foundational, data-driven context on existing conditions in the Bay Area.

Background:

Plan Bay Area is the long-range regional plan for the San Francisco Bay Area, integrating transportation, land use, housing, environmental and economic considerations into a single planning framework that focuses growth near transit to support complete, connected and affordable communities. It fulfills multiple statutory and regulatory requirements, serving as the federal Regional Transportation Plan (RTP) and the state Sustainable Communities Strategy (SCS) as required under Senate Bill (SB) 375 (Steinberg, 2008). It has been updated every four years, alternating between minor and major updates, since the adoption of the original Plan Bay Area in 2013.

The most recent iteration, Plan Bay Area 2050+, was a minor update unanimously adopted by MTC and ABAG in March 2026. It has since secured final approvals from key regulatory partners, including Caltrans, the Federal Highway Administration (FHWA) and Federal Transit Administration (FTA), and the California Air Resources Board (CARB).

Scoping Plan Bay Area 2060:

Staff have scoped Plan Bay Area 2060 with an emphasis on finding balance: constrained and grounded in near-term realities while remaining ambitious and visionary in advancing the region's shared vision for 2060. This will require meaningfully responding to the pressing issues facing the Bay Area, emerging planning trends and best practices, and core regulatory requirements, all while furthering progress toward the plan's long-term vision.

To inform the scoping process, staff solicited early feedback from MTC-ABAG committees, the MTC-ABAG Community Advisory Council and external technical partners. Feedback ranged widely but primary areas of interest included the following topics:

- Transportation safety and accessibility;
- Partner engagement and coordination;
- Updates to the land use framework;
- Fiscal realities and tradeoffs
- Greater emphasis on near-term actions;
- Grappling with the complex dynamics of housing and growth forecasts;
- Increased climate hazards like wildfire; and
- A potentially higher Regional Housing Needs Determination (RHND).

Further information on feedback staff received is included in Attachment A.

At the MTC-ABAG Community Advisory Council meeting on September 4, 2026, staff presented a preview of Plan Bay Area 2060 and solicited additional feedback prior to formal kickoff. The Council's input resonated with prior scoping feedback, pointing to concerns about how the plan can be realistically implemented, funded, coordinated and balanced across competing regional needs, while highlighting certain policy interests like e-bikes/scooters and sidewalk safety, speed limits, and sea level rise adaptation.

Four Phases of Work:

Staff propose to organize development of Plan Bay Area 2060 around four phases:

- **Foundations (2026-2027):** This phase will establish shared priorities and examine key components of past plans. Core questions to be explored include:
    - *What is our shared vision for the future of the Bay Area?*
    - *How effective are the existing strategies in Plan Bay Area 2050+?*
    - *Where and how should we plan for growth as a region?*
- **Outlook (2026-2027):** This phase will assess emerging trends, examine uncertainties and update forecasts. Core questions include:

  - *How might external forces and the choices we make affect the region's trajectory, given significant uncertainties about the future?*
  - *How much population, jobs and housing growth does the region need to plan for?*
  - *What revenue can reasonably be anticipated for our transportation, housing and environmental needs?*

- **Blueprint (2027-2029):** This phase will update, analyze and refine the plan's core building blocks. Core questions include:
  - *How do we piece together the revised strategies, Land Use Framework, and transportation and resilience projects into a Blueprint for the plan?*
  - *How effective is the Blueprint at making progress toward regional goals?*
- **Final Plan (2029-2030):** This phase will formalize and translate the plan into a final set of documents for Commission and Board adoption. Core questions include:
  - *How might we tell the story of the plan to Bay Area residents?*
  - *What are the potential environmental impacts of the plan and its alternatives?*
  - *What actions can MTC-ABAG advance in the following five years?*

Further information is included in Attachment A, including a simplified timeline and the primary areas of work within each phase. A more detailed timeline overview with additional milestones is included in Attachment B.

Public and Partner Engagement Approach:

Plan Bay Area 2060 will pursue an engagement approach centered on creating meaningful opportunities for all stakeholders to share perspectives and shape the region's long-range plan. This approach will prioritize depth over breadth, favoring sustained conversations over large-scale, one-time engagement efforts. Staff will explore new avenues for educational engagement and reaching new audiences, including gamification, short-form video and innovative web content. Building on the central role community-based organizations have played in previous Plan Bay Area cycles, staff will collaborate with CBO partners to co-design engagement activities and outreach approaches that best meet the needs of the region's diverse communities.

Engagement with technical partners and elected officials will similarly center relationship-building by showing up at existing networks and local venues. In addition, staff will deliver timely updates and provide detailed information about how and when partners with specific interest areas can engage in the plan development through online "coordinating roadmaps," and convening at key decision points to discuss priorities and tradeoffs.

Early engagement, beginning in fall 2026, will revolve around the following questions:

- How can the experiences of different communities help us better understand what is happening across the region?
- What outcomes do stakeholders prioritize for the future of the Bay Area?
- How well do our guiding principles of an Affordable, Connected, Diverse, Healthy and Vibrant region reflect current aspirations?
- Where and when can stakeholders expect to shape the plan over the coming years?

Regulatory Uncertainty:

Plan Bay Area 2060 has been scoped to be flexible, given ongoing uncertainty in both state and federal regulations. New greenhouse gas targets and guidelines from CARB are anticipated in late 2028, well into the development of Plan Bay Area 2060, under the timeline established in Senate Bill 1087 (Cabaldon). Furthermore, Assembly Bill 2296 (Papan) accelerated the parallel RHNA Cycle 7 timeline by six months, which must be informed by Plan Bay Area. At the federal level, funding remains subject to change, and a potential rulemaking on equity could affect plan analyses and more. Staff will continue to monitor these developments and adjust the plan's scope as necessary.

The Bay Area Today Presentation:

The Plan Bay Area 2060 Foundations phase begins by establishing a shared understanding of the region's current conditions and revisiting the plan's guiding principles. Staff will share a baseline analysis of trends, challenges and opportunities to inform discussion about how these conditions could shape Plan Bay Area 2060's vision. The presentation, included as Attachment A, is organized around the existing plan's five guiding principles — Affordable, Connected, Healthy, Vibrant and Diverse — providing a high-level synthesis of more than 40 metrics across transportation, housing, the economy, the environment and equity. The analysis draws

extensively on MTC-ABAG's Vital Signs, which provides a deeper-dive resource with additional indicators, historical trends and geographic detail across many of the topics explored. Staff previewed the presentation with the MTC-ABAG Community Advisory Council earlier this month, prompting a range of perspectives from Council members. Today's presentation integrates revisions based on Council feedback, including the addition of county-level data for specific indicators.

Next Steps:

The Public Participation Plan was adopted by the Commission on September 23, 2026, enabling the public kickoff of Plan Bay Area 2060 with an initial round of engagement this fall. On October 9, 2026, the process was launched at the joint meeting of the MTC Planning Committee and ABAG Administrative Committee. Through the fall and into the winter, staff will engage with the public and partners to understand whether the existing vision for the long-range plan continues to serve and respond to lived experiences across the region. Staff will return to the MTC Planning Committee and the ABAG Administrative Committee with updates on the Foundations and Outlook phases of work. By early spring, staff will return to the Commission and Board to formally adopt guiding principles as the foundation for the remainder of the planning process.

Recommendation:

Information only.

Attachments:

- Attachment A: Presentation
- Attachment B: Plan Bay Area 2060 Detailed Timeline Overview

Andrew B. Fremier, Executive Director

PLAN bay area 2060

Plan Bay Area 2060 Overview

MTC-ABAG Workshop

October 2026

ASSOCIATION OF BAY AREA GOVERNMENTS
METROPOLITAN TRANSPORTATION COMMISSION

Photo: Karl Nielsen

Background: Plan Purpose & Requirements

Plan Bay Area...

- **Is the region's long-range plan**, integrating transportation, housing, land use and the environment to accommodate future growth in the right places.
- **Sets regional priorities** through a framework that evolves with emerging needs and challenges.
- **Does not** override local land use authority, award money to projects or strategies, or propose specific legislation.

State & Federal Rules

✓ **Fulfills** the federal Regional Transportation Plan (RTP) and state Sustainable Communities Strategy (SCS) planning requirements every four to eight years.
✓ Engages the **community** through a robust, collaborative process.
✓ Identifies and prioritizes **transportation** investments over the next few decades.
✓ Accommodates existing and future **housing** needs across all household income levels.
✓ Meets ambitious **climate** targets, including per-capita greenhouse gas reduction targets set by the state.

***Note**: Several additional requirements of the planning process are not shown.*

Background: From Plans to Implementation, 2010-today

Caltrain Electrification

SMART Train & Pathway

Napa Valley Vine Trail

Treasure Island Development & Adaptation

East Contra Costa BART Extension

Suisun Valley Farm-to-Market

Bay Meadows Urban Village

San José Tamien Station

East Bay Greenway Multimodal Project

Background: Plan Bay Area 2050+ Overview

Guiding Principles

Ensure by the year 2050 that the Bay Area is affordable, connected, diverse, healthy and vibrant *for all*.

Elements + Strategies

- **12 Transportation** strategies focused on "Fix It First," healthy and safe streets, and transit expansion and enhancement.
- **8 Housing** strategies focused on the "3 Ps": production, preservation and protection.
- **6 Economy** strategies focused on improving economic mobility and the location of jobs.
- **9 Environment** strategies on reducing hazard risks, parks and open space, and climate emissions.

Plan Bay Area 2060: Proposed Approach

- ❑ **Ambitious in its vision,** while **grounded in today's realities.**
- ❑ Meaningfully respond to:
  - **Pressing issues** facing the Bay Area
  - **Planning trends** and best practices
  - **Core regulatory requirements**
  - Furthering **shared vision** for 2060

Photo: Karl Nielsen

Early Scoping Feedback

Policy concerns

- Transportation safety and accessibility.
- Housing affordability, growth forecasts, wildfire risks and RHNA.
- Sea level rise, local plan alignment and managed retreat vs. adaptation.
- Emerging technologies like AI, automation and e-bikes.

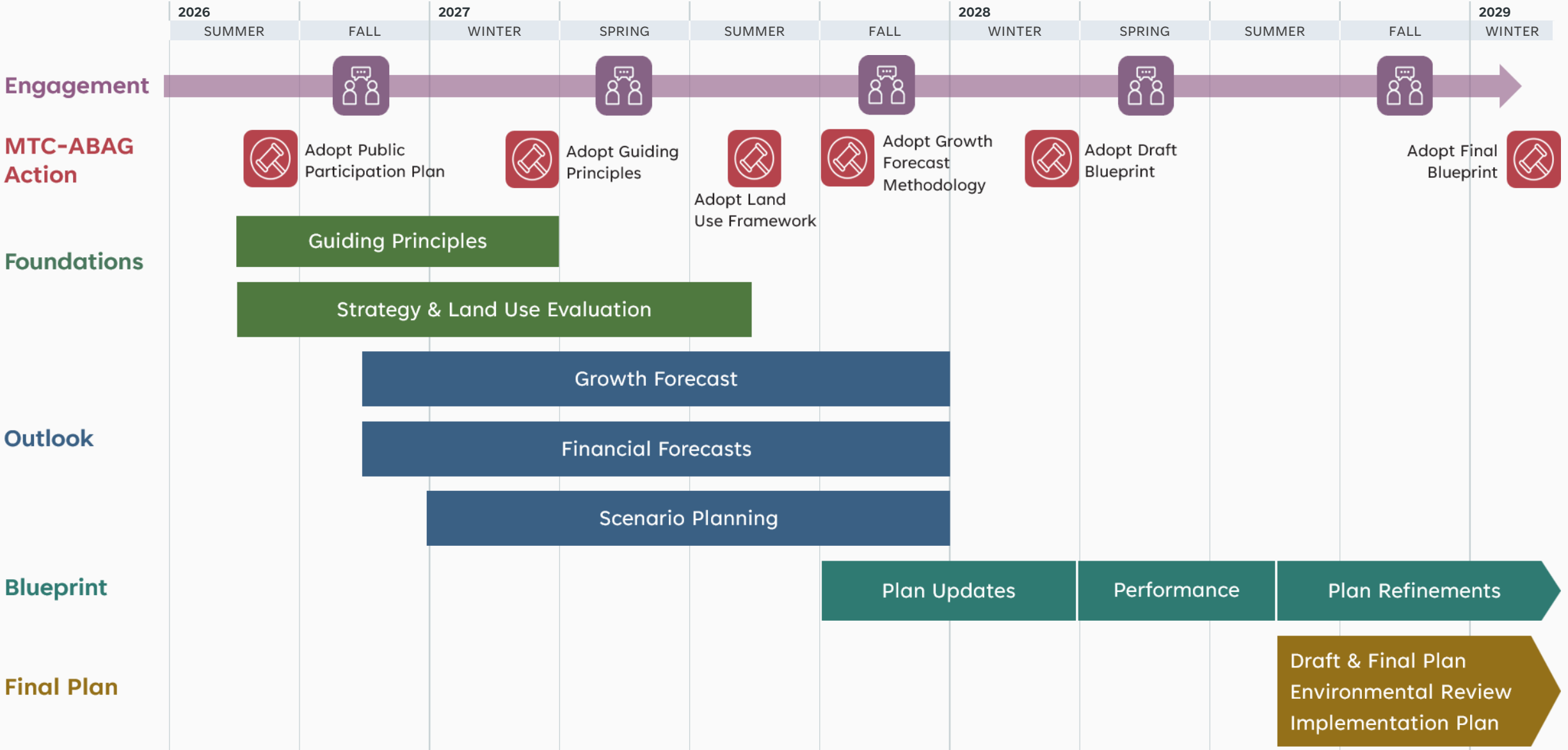
Process goals

- Deepen and sustain partner engagement and feedback coordination.
- Balance utility, clarity and consistency in a revamped land use framework.
- Revisit how projects are prioritized given increased constraints and hard tradeoffs.

Implementation

- Measure progress, taking stock of what has and has not worked in past plans.
- Lean into near-term actions with an even stronger focus on implementation.
- Consider fiscal realities and funding alternatives for implementation priorities.

Plan Timeline: Fall 2026 to Early 2029



Note: *Approximate schedule; subject to change. Final plan adoption anticipated in early 2030.*
Thematic coordination roadmaps and a more comprehensive project schedule now available at: planbayarea.org/2060

Scope Highlight: Foundations Phase

Foundations

Establish shared priorities and examine key components of past plans

2026-2027

Area of Work	Core Question
Guiding Principles	What is our shared vision for the future of the Bay Area?
Strategy Evaluation	How effective are existing Plan Bay Area 2050+ strategies?
Land Use Framework	Where and how should we plan for growth as a region?

Scope Highlight: Outlook Phase

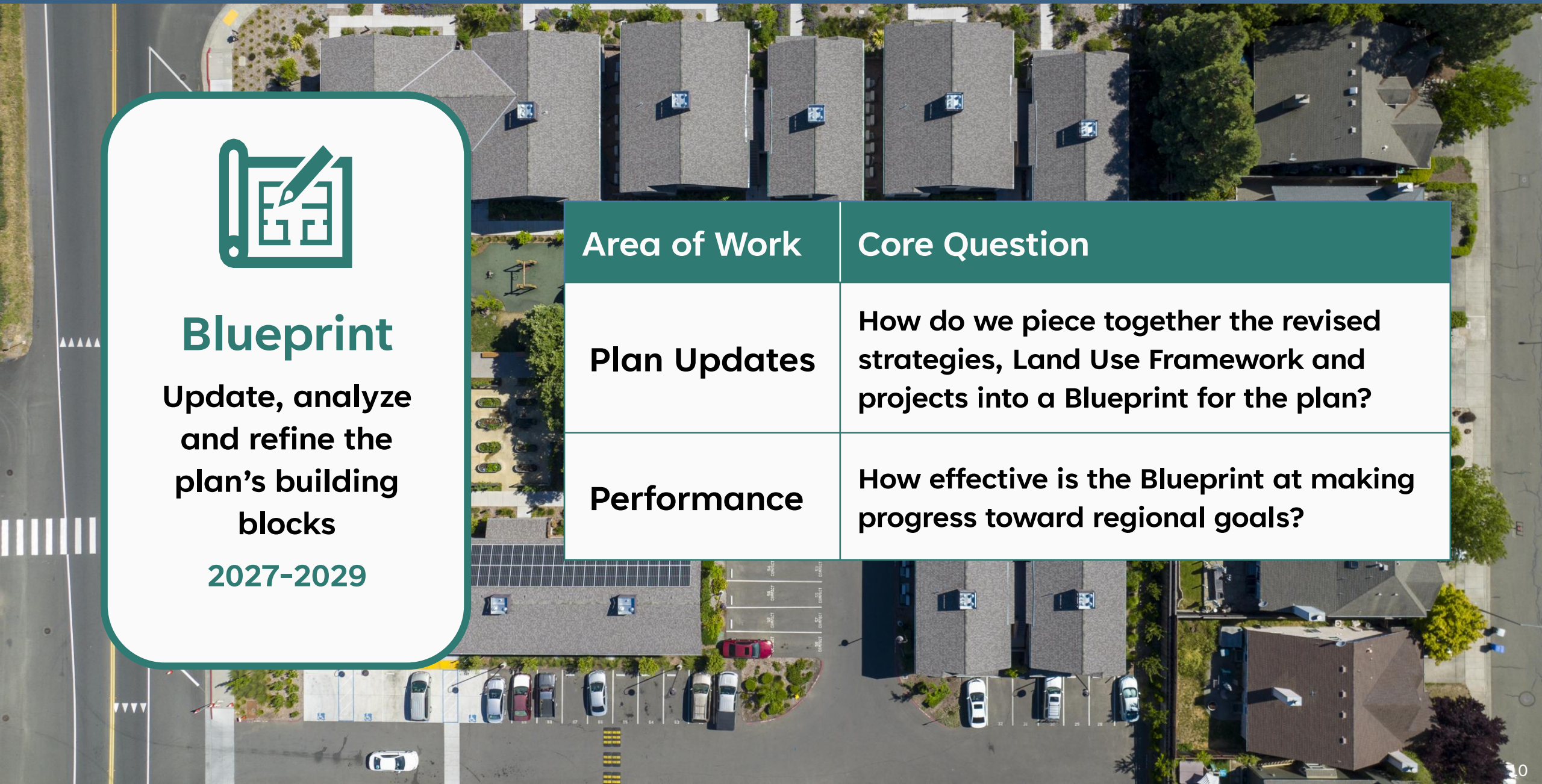
Outlook

Assess emerging trends, examine uncertainties and update forecasts

2026-2027

Area of Work	Core Question
Scenario Planning	**How might external forces and the choices we make affect the region's trajectory, given significant uncertainties about the future?**
Growth Forecast	**How much population, jobs and housing growth does the region need to plan for?**
Financial Forecasts	**What revenue can reasonably be anticipated for our transportation, housing and environmental needs?**

Scope Highlight: Blueprint Phase



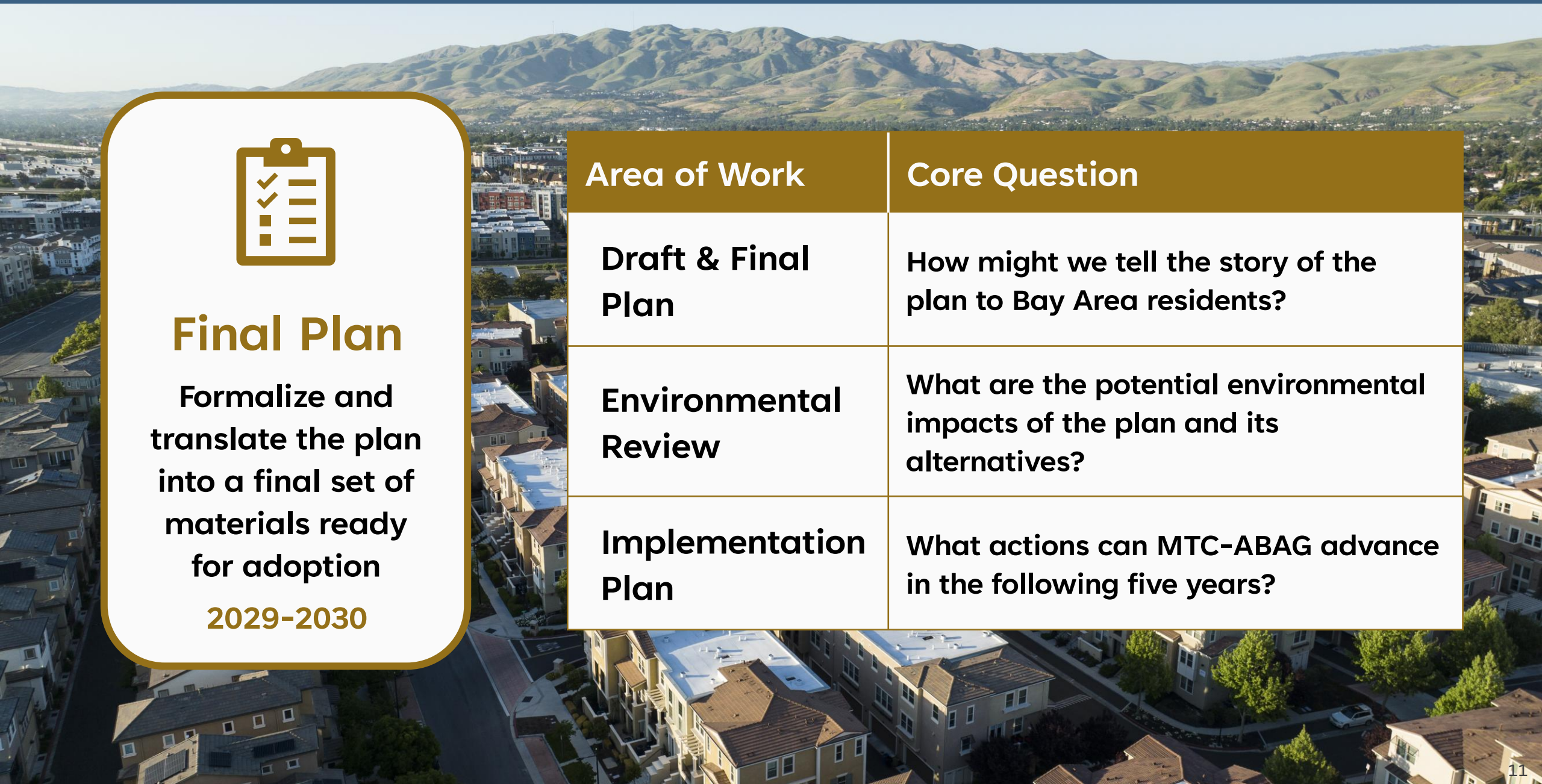
Blueprint

Update, analyze and refine the plan's building blocks

2027-2029

Area of Work	Core Question
Plan Updates	**How do we piece together the revised strategies, Land Use Framework and projects into a Blueprint for the plan?**
Performance	**How effective is the Blueprint at making progress toward regional goals?**

Scope Highlight: Final Phase



Final Plan

Formalize and translate the plan into a final set of materials ready for adoption

2029-2030

Area of Work	Core Question
Draft & Final Plan	How might we tell the story of the plan to Bay Area residents?
Environmental Review	What are the potential environmental impacts of the plan and its alternatives?
Implementation Plan	What actions can MTC-ABAG advance in the following five years?

Engaging the Public, Partners and Elected Officials

Public Engagement

Prioritize Depth Over Breadth

Explore New Avenues to Engage & Educate

Elevate Community-Based Organizations

Partner and Elected Engagement

Show Up at Existing Partner Forums

Invite Timely Feedback

Convene at Key Decision Points

Guiding Principles: Revisiting for 2060

Affordable

All Bay Area residents and workers have sufficient access to housing options they can afford.

Connected

An expanded, well-functioning, safe and multimodal transportation system connects the Bay Area.

Diverse

The Bay Area is an inclusive region where people from all backgrounds, abilities and ages can remain in place with access to the region's assets and resources.

Healthy

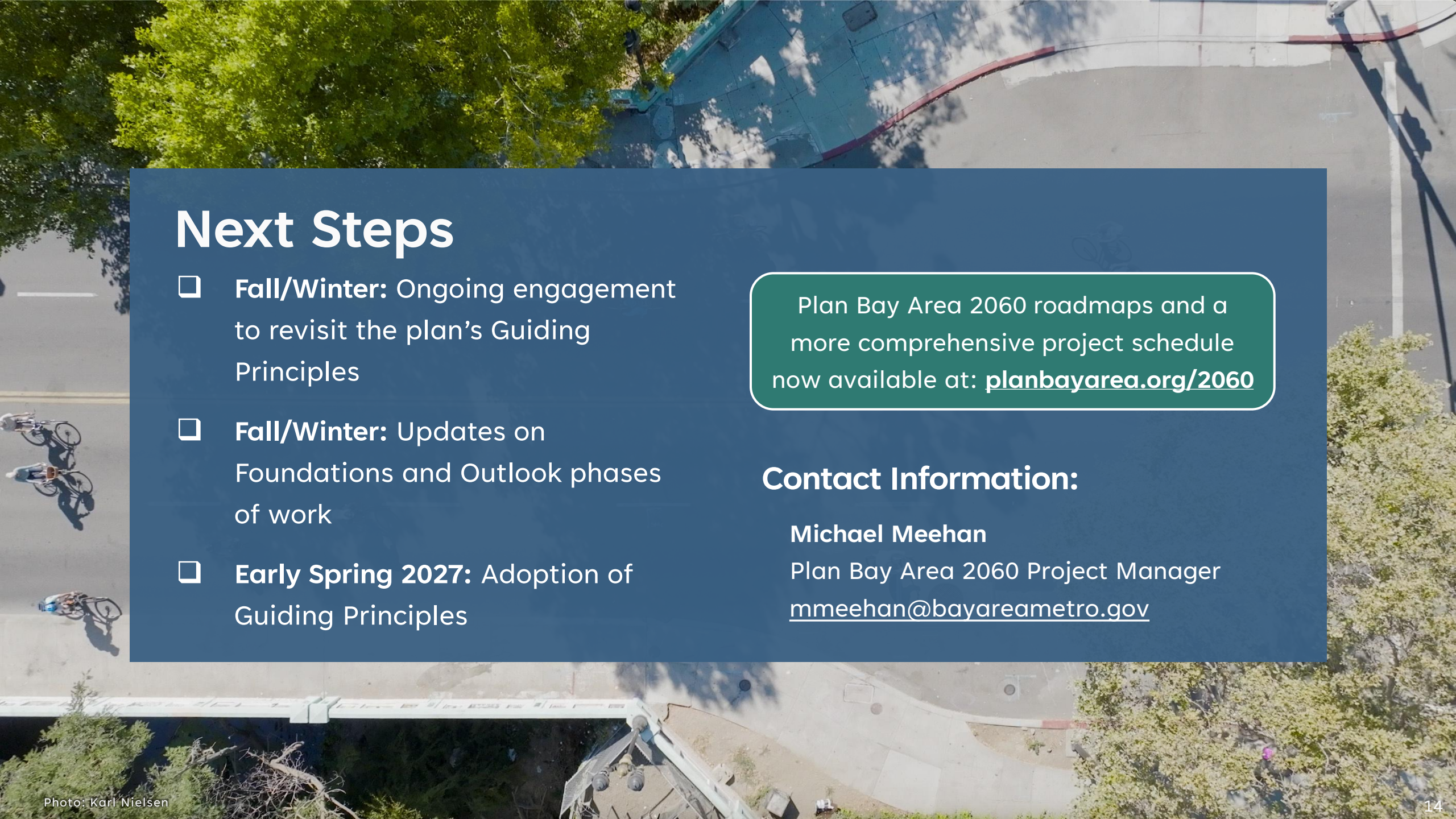
The region's natural resources, open space, clean water and clean air are conserved, and residents can live and travel safely.

Vibrant

The Bay Area is an innovation leader, creating job opportunities for all and ample fiscal resources for communities.

Key Question for Early 2027:

Does this vision remain salient for **Plan Bay Area 2060?**



Next Steps

- ❑ **Fall/Winter:** Ongoing engagement to revisit the plan's Guiding Principles
- ❑ **Fall/Winter:** Updates on Foundations and Outlook phases of work
- ❑ **Early Spring 2027:** Adoption of Guiding Principles

Plan Bay Area 2060 roadmaps and a more comprehensive project schedule now available at: **planbayarea.org/2060**

Contact Information:

Michael Meehan
Plan Bay Area 2060 Project Manager
mmeehan@bayareametro.gov

Photo: Karl Nielsen

PLAN bay area 2060

Plan Bay Area 2060 Foundations: The Bay Area Today

MTC-ABAG Workshop

October 2026

ASSOCIATION OF BAY AREA GOVERNMENTS
METROPOLITAN TRANSPORTATION COMMISSION

Photo: Karl Nielsen

Existing Conditions: A Starting Point for Plan Bay Area 2060

The purpose of this presentation:

- **Provide a foundational context for** the region's "existing conditions," drawing on MTC-ABAG's Vital Signs and other data sources.
- **Identify trends, challenges and opportunities** shaping the region.
- **Prompt discussion on** how these conditions could shape Plan Bay Area 2060's vision and strategies.

Organized by the Plan Bay Area 2050+ Guiding Principles

A synthesis of 40+ metrics across housing, transportation, economy, environment and equity to explore the following questions:

Affordable

How have housing costs and affordability changed since the post-recession tech boom began reshaping housing affordability?

Connected

How has the transportation system changed since the pandemic reshaped travel and work?

Healthy

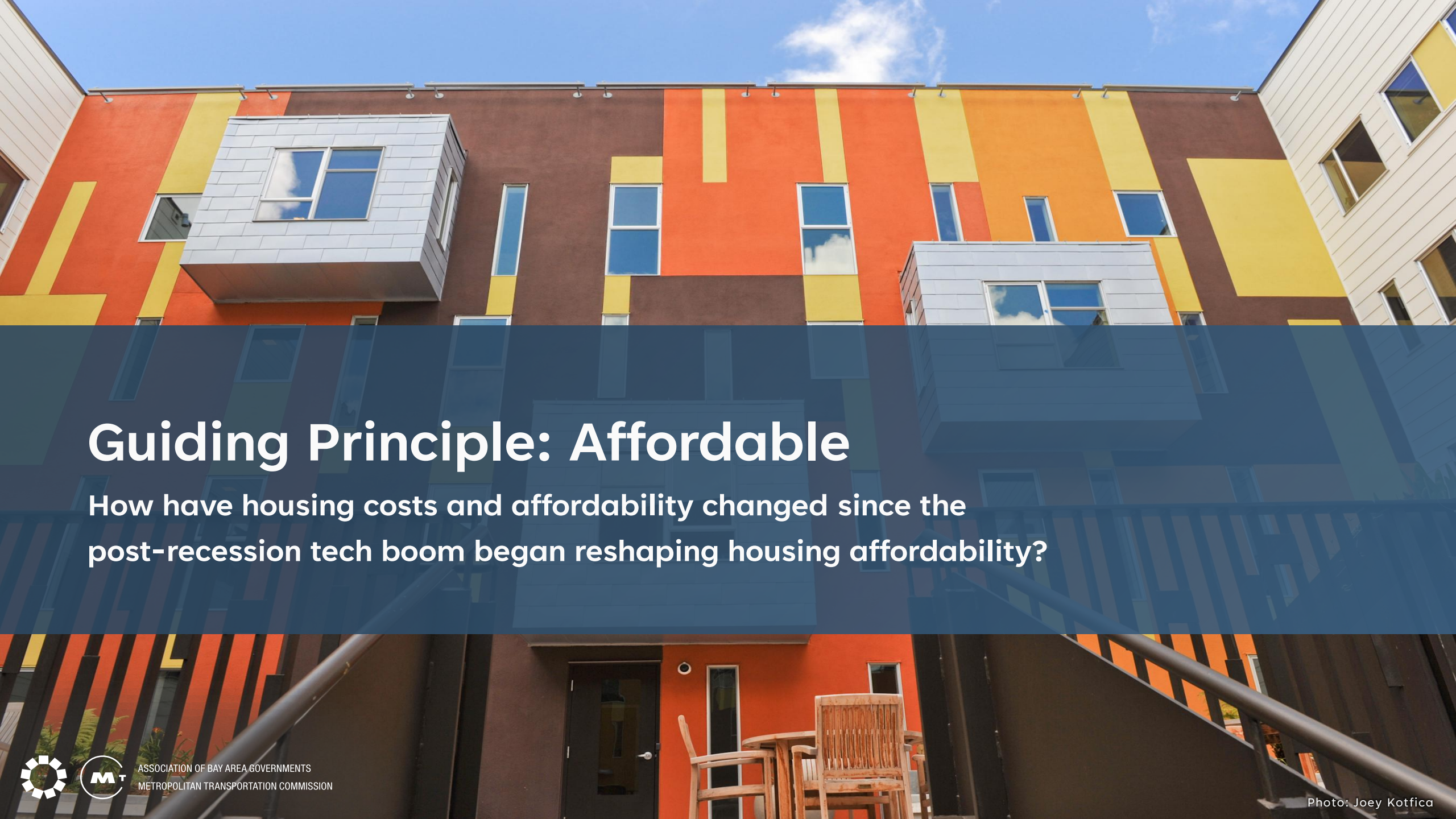
What are the trends and risks affecting the region's ability **to become cleaner, safer and more resilient?**

Vibrant

How has the Bay Area's economy changed across boom-and-bust cycles?

Diverse

How has the region's socio-economic landscape changed?



Guiding Principle: Affordable

How have housing costs and affordability changed since the post-recession tech boom began reshaping housing affordability?

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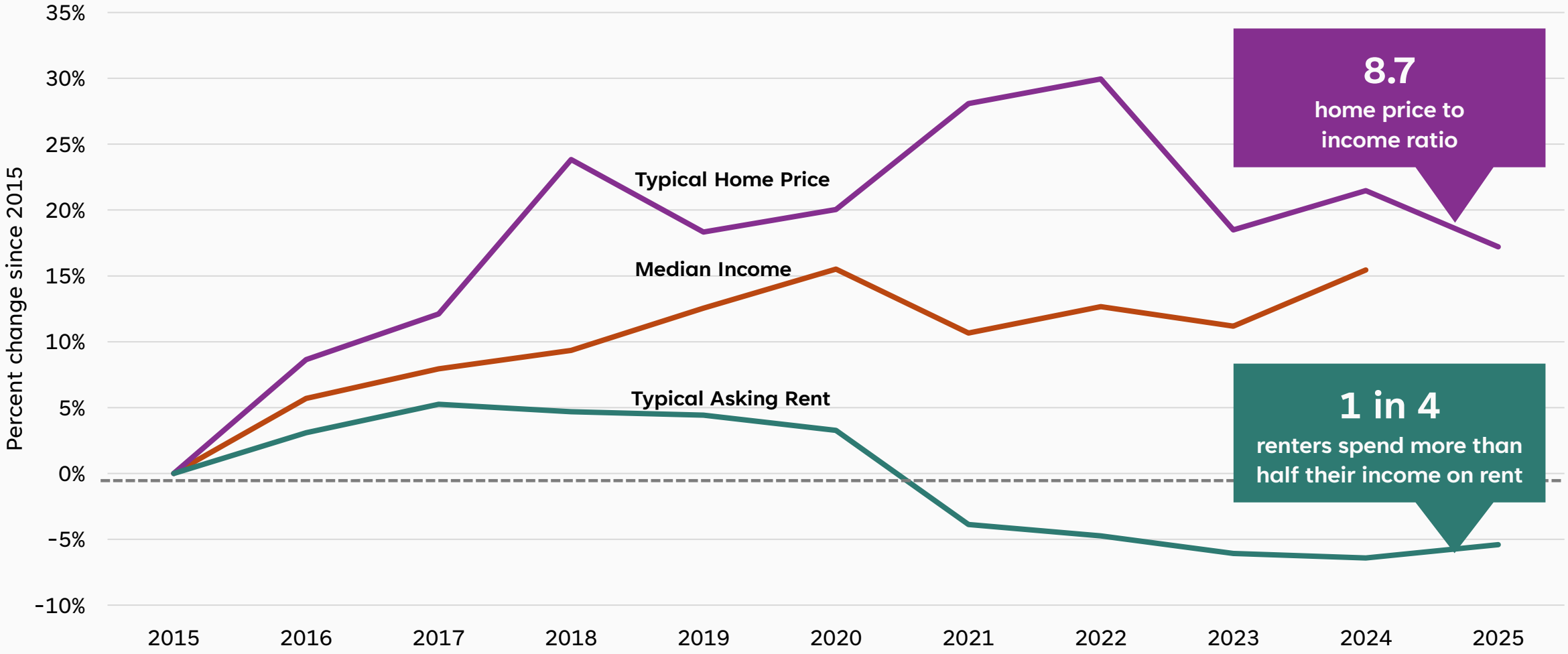
Photo: Joey Kotfica

Inflation-Adjusted Home Prices Outpace Income, While Rents Fall

Affordable

Change in Regional Typical Home Prices and Asking Rents Compared to Median Income (Inflation-Adjusted, $2025)

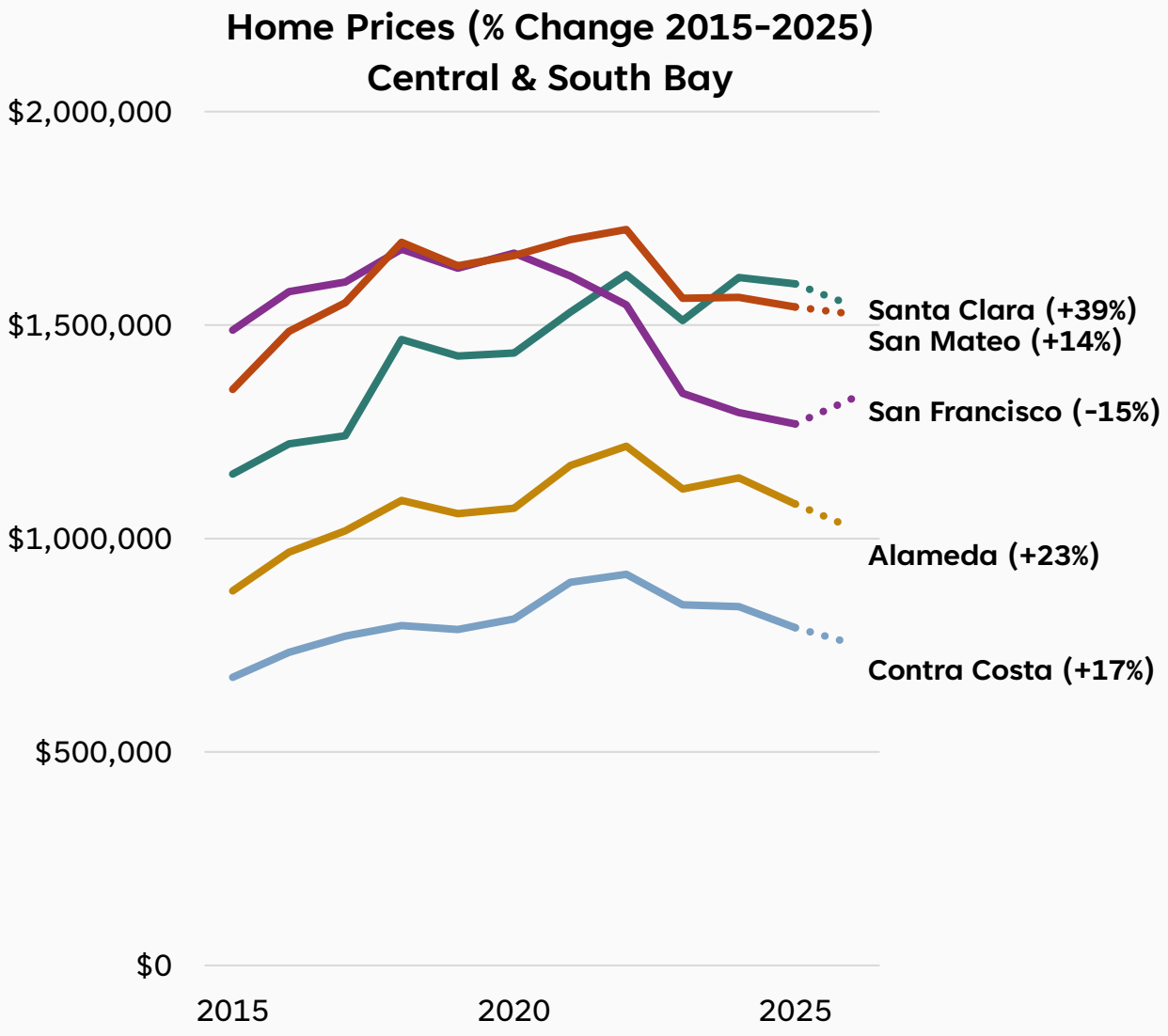


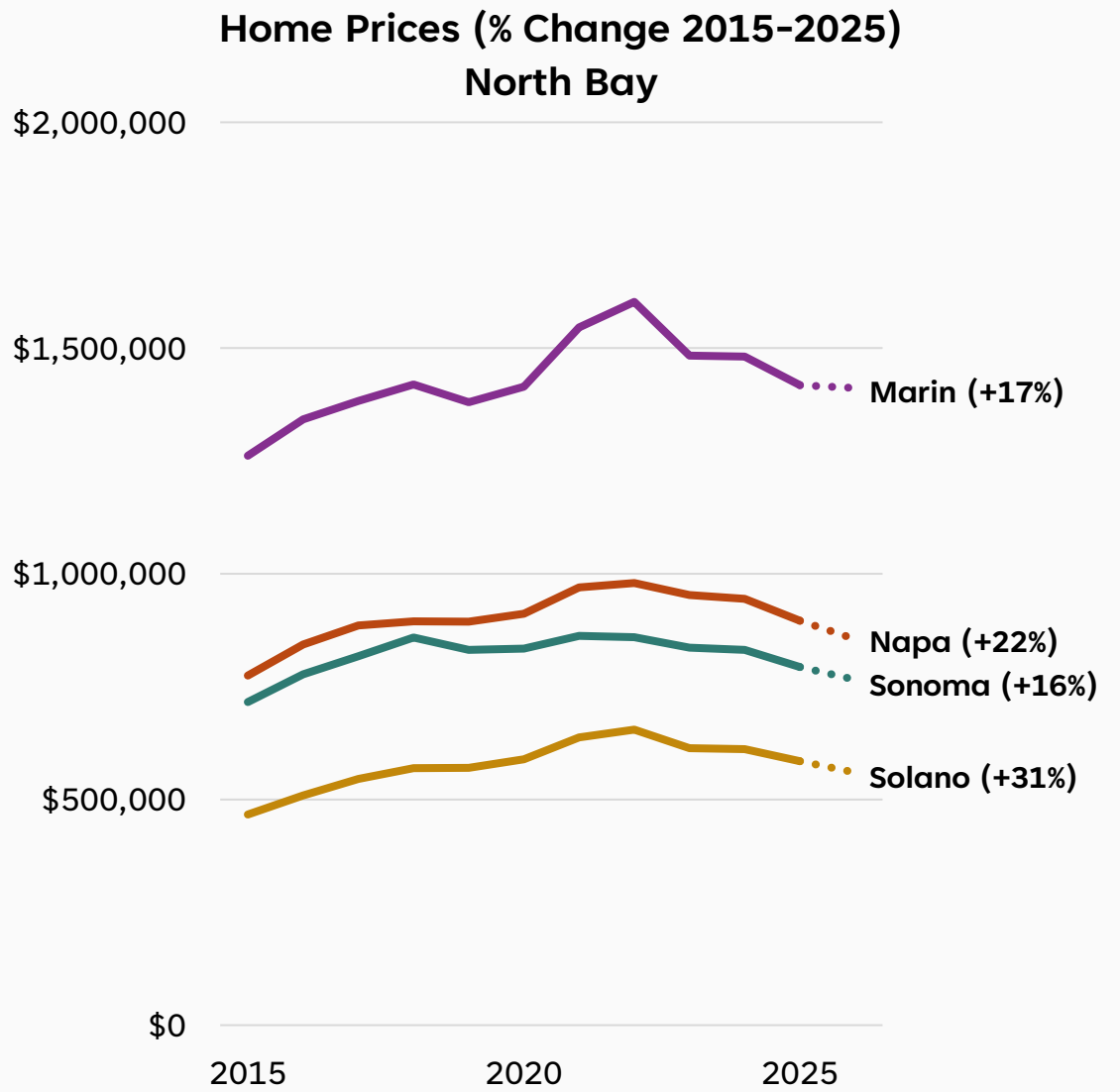
Source: *Vital Signs – ACS 1-year estimates (Table B190013), Zillow Observed Rent Index, Zillow Home Value Index, BLS Consumer Price Index*

Notes: *Values have been inflation-adjusted using CPI all items less shelter.*

Home Prices Remain High Across Counties, Despite Recent Fluctuations

Affordable



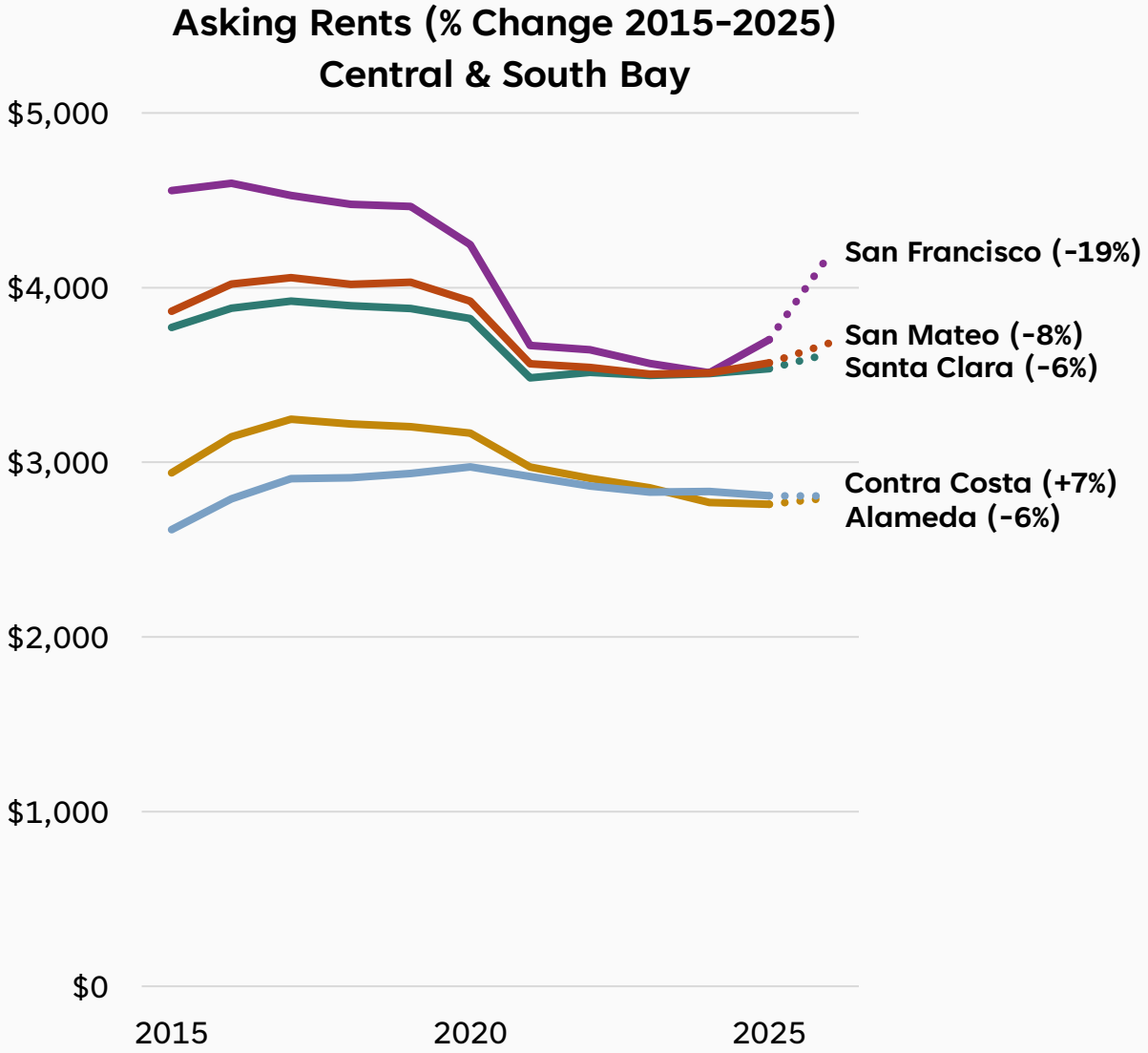


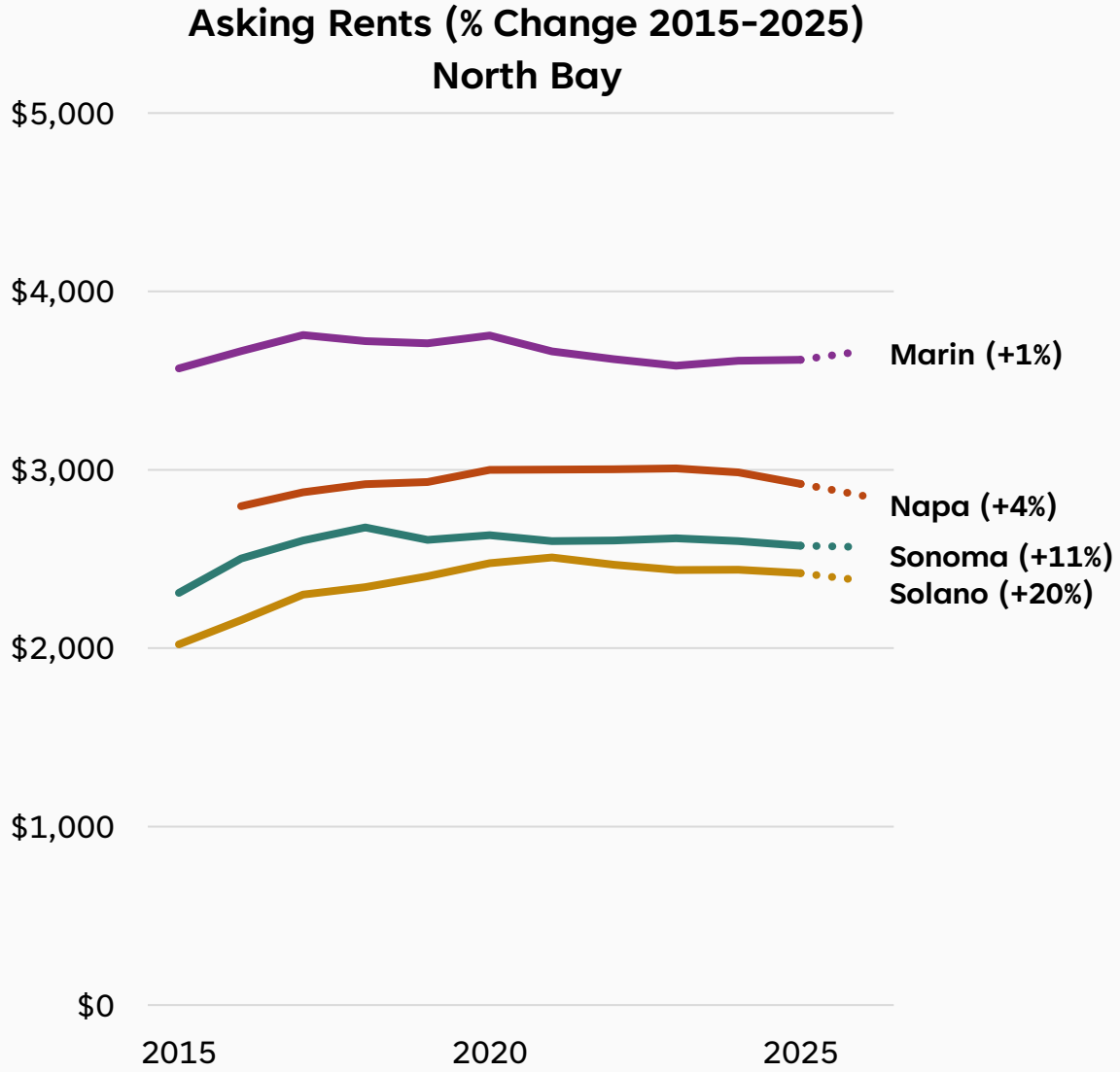
***Source**: Zillow Home Value Index (All Homes Time Series), BLS Consumer Price Index*

***Notes:** 2026 values are shown with dotted lines as data for the full year is not yet available. Values have been inflation-adjusted to 2025 dollars using CPI all items less shelter.*

Trends in Asking Rents Have Varied Across Counties

Affordable





***Source**: Zillow Observed Rent Index (All Homes Plus Multifamily Smoothed/Seasonally Adjusted Time Series), BLS Consumer Price Index*

***Notes:** Asking rents for Napa County in 2015 were not available and percent change is calculated for 2016-2025. 2026 values are shown with dotted lines as data for the full year is not yet available. Values have been inflation-adjusted to 2025 dollars using CPI all items less shelter.*

High Housing Costs Are Part of a Broader Cost-of-Living Challenge

Affordable

Between 2014 and 2024, inflation-adjusted costs rose...

Childcare

+51%

~$2.9K/month

Health Care

+42%

~$1.0K/month

Transportation

+9%

~$0.8K/month

...and these costs have likely grown even more in 2025 and 2026

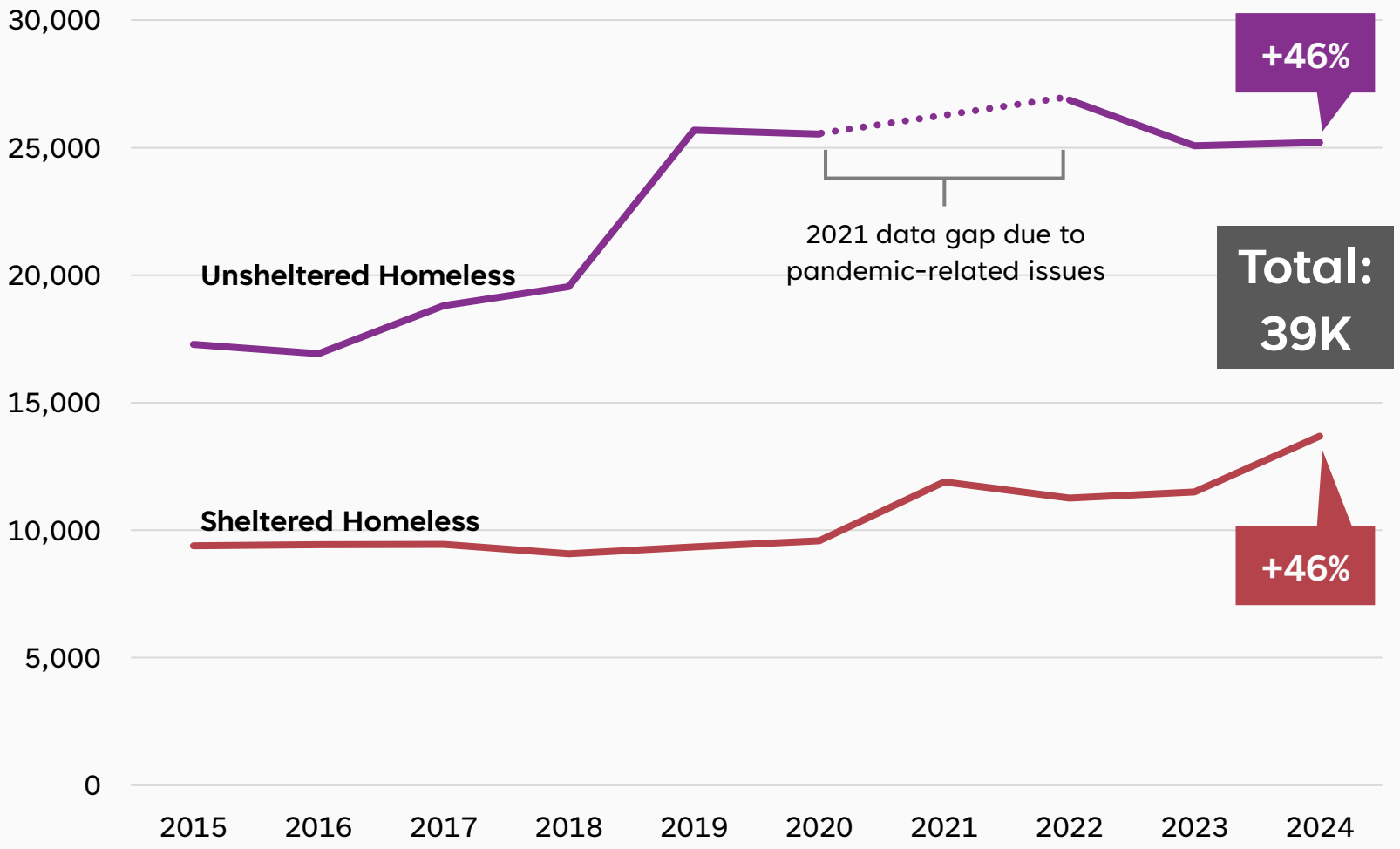
Source: *University of Washington Self Sufficiency Standard for California, US Energy Information Administration, BLS Consumer Price Index*

Notes: *All calculated values are for a family of four, with two adults, one infant and one school-age child. County-based data was aggregated to the region using population-weighted averages. Changes in transportation costs are calculated for Napa, Santa Clara, Sonoma, and Solano counties only, due to methodological issues with how transportation costs are calculated across different years. Values have been inflation-adjusted to 2024 dollars using CPI all items.*

High Housing Costs Are Reflected in Homelessness and Overcrowding

Affordable

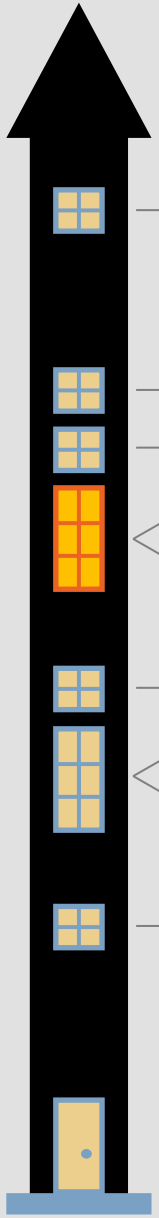
Bay Area Homeless Population (2005-2024)



Source: *Department of Housing and Urban Development (Point in Time Counts), ACS 1-Year Estimates (B25014), CA Dept of Finance Population and Housing Estimates (Table E-4)*

Notes: *A household is defined as overcrowded when there is more than one person per room.*

Overcrowding Rates in Rental Units (2024)

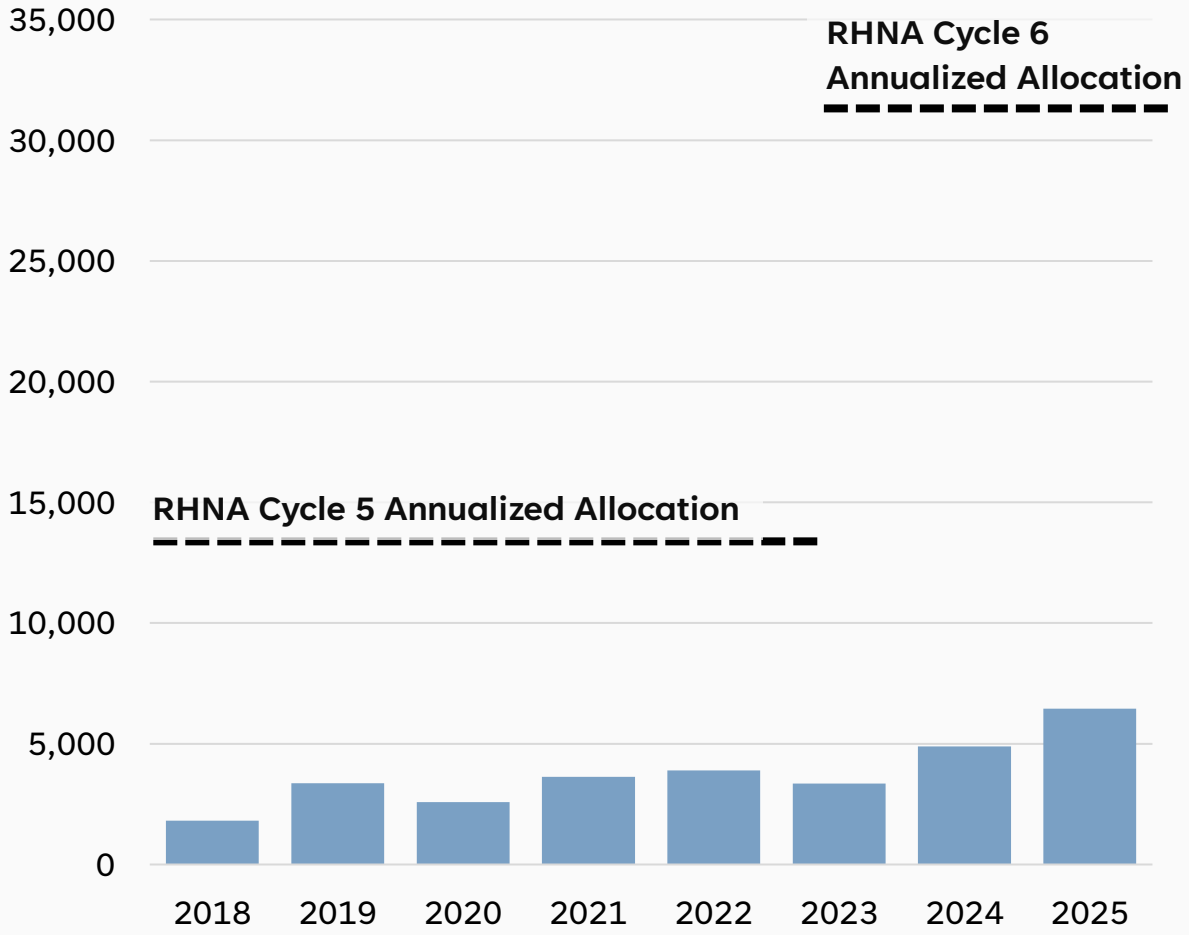


- **15%** Los Angeles
- **12%** Miami
- **11%** San Diego
- **10%** BAY AREA
- **10%** New York
- **8%** Washington DC
- **7%** Dallas
- **7%** Seattle
- **5%** Chicago

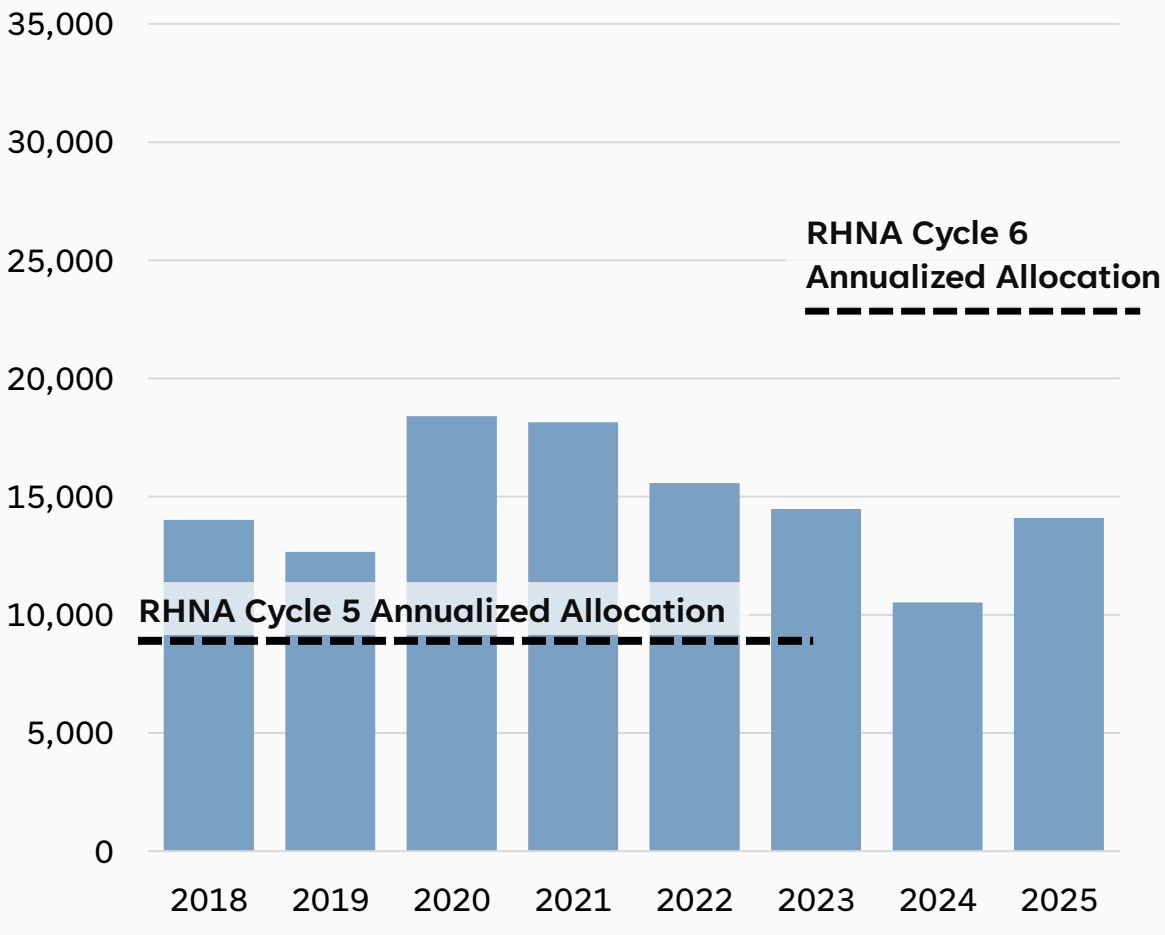
Housing Production Continues to Fall Far Short of RHNA Targets

Affordable

Affordable Housing Production (2018-2025)



Market-Rate Housing Production (2018-2025)



Source: *HCD, Certificates of Occupancy*

Notes: *Affordable housing is defined as deed-restricted housing for households with very low income (<50% AMI), low income (50-80% AMI), or moderate income (80-120% AMI).*

Guiding Principle: Connected

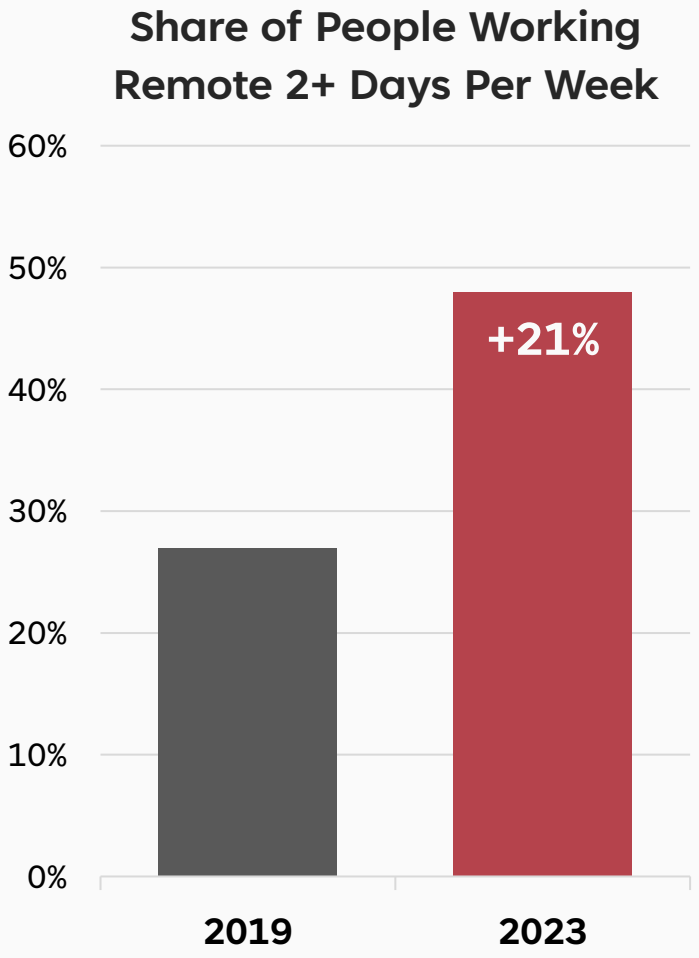
How has the transportation system changed since the pandemic reshaped travel and work?

ASSOCIATION OF BAY AREA GOVERNMENTS
METROPOLITAN TRANSPORTATION COMMISSION

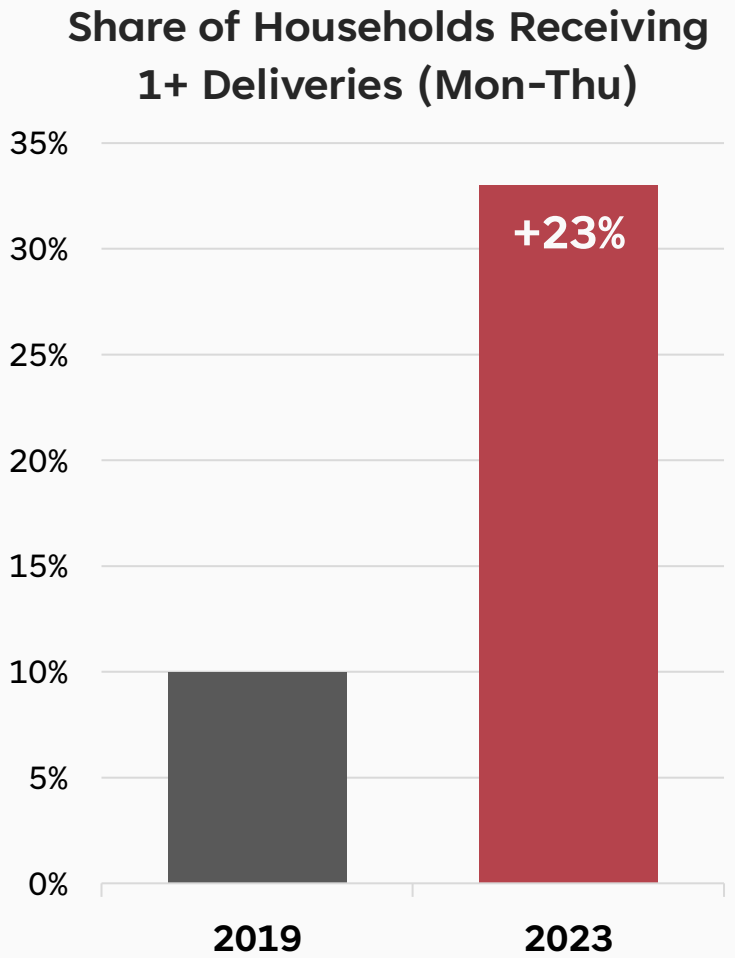
Photo: Calvin Jordan

Travel Needs Have Changed Since the Pandemic

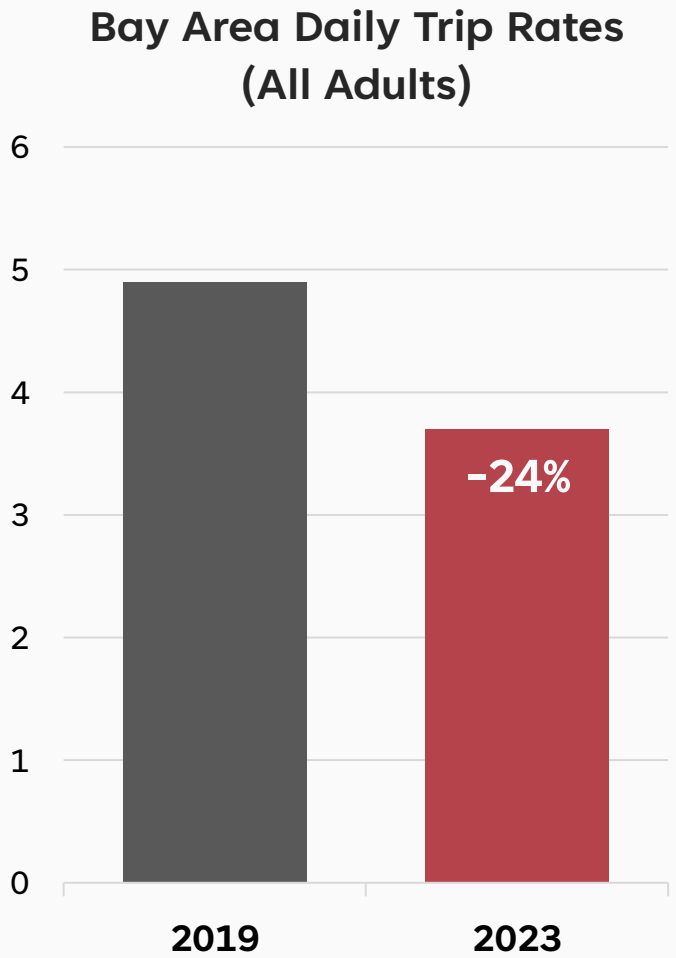
Connected



More Remote Work



More Food and Grocery Delivery



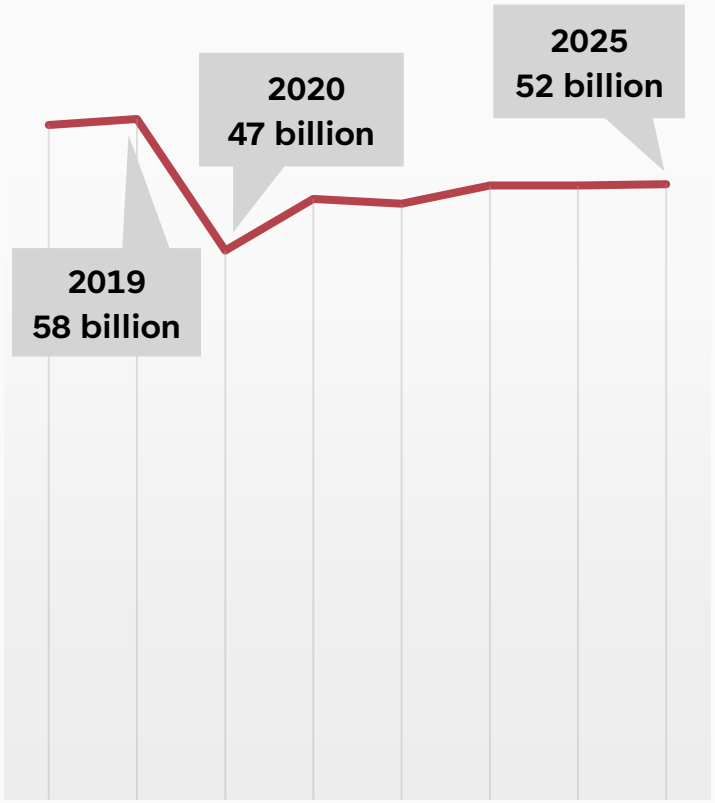
Fewer Trips

Source: *MTC Bay Area Travel Study*

Post-Covid Shifts in Travel Behavior Vary by Mode

Connected

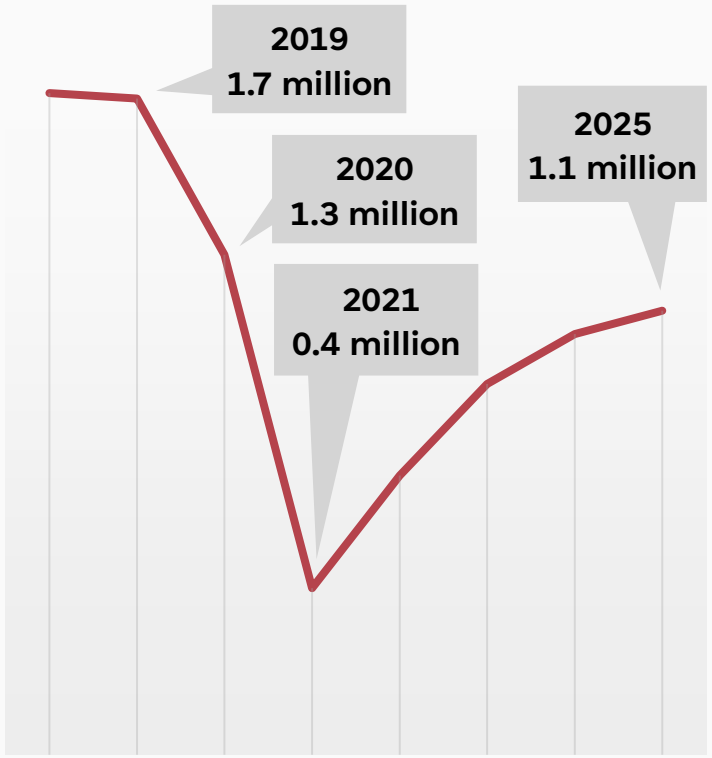
Total Annual Vehicle Miles Traveled



Driving Slowly Rebounding

Source: *California Air Resources Board (EMFAC model outputs)*

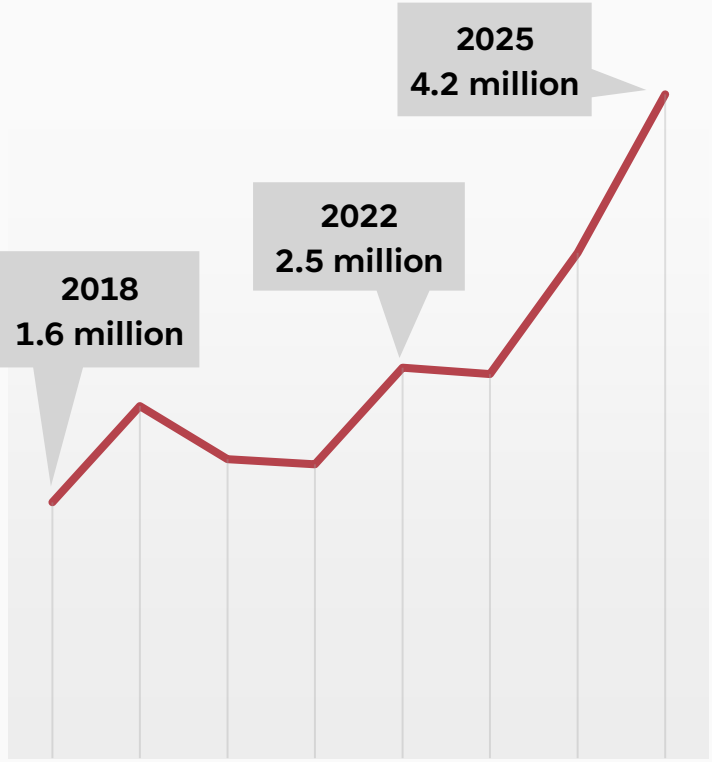
Transit Weekday Boardings



Transit Ridership Rising But Still Much Lower

Source: *FTA National Transit Database*

Annual Lyft Bike Trips

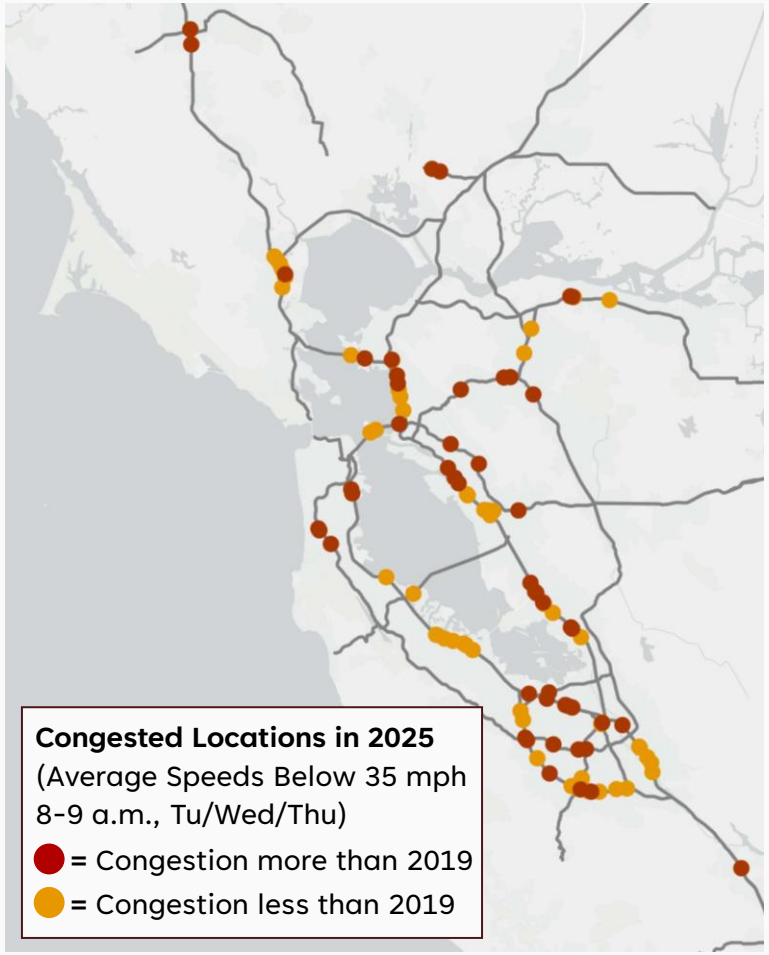


Lyft Bike Trips Growing Strong

Source: *Lyft Ridership Data*

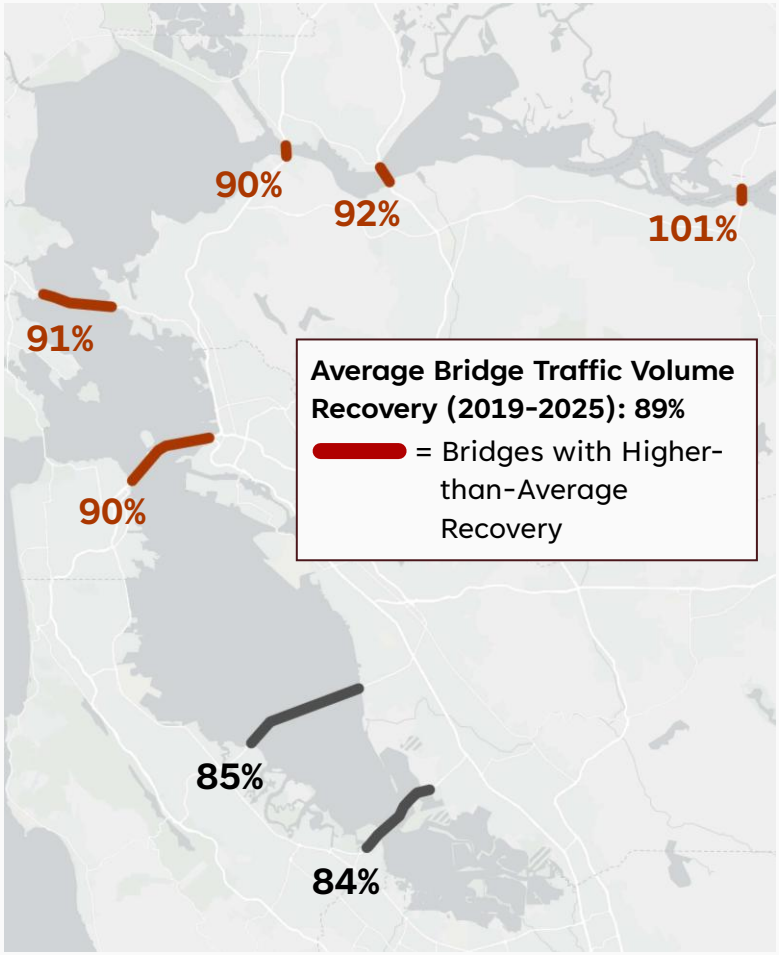
Post-Covid Shifts in Travel Behavior Also Vary by Geography

Connected



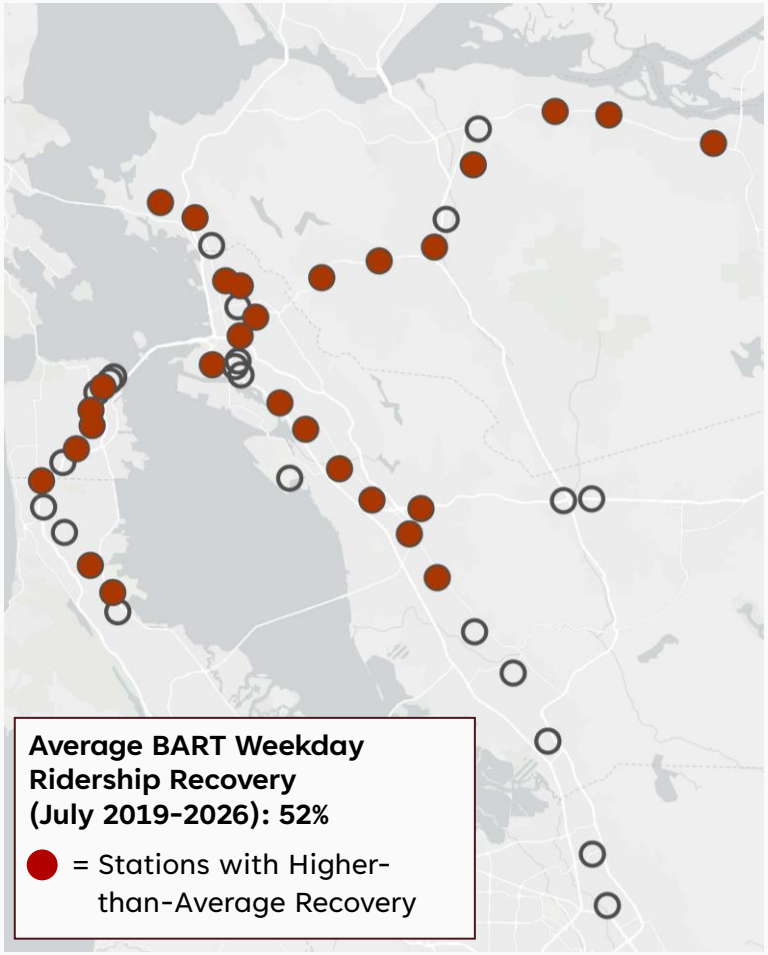
Peak-Period Congestion Worsening on Many Bay Area Freeways

Source: *Caltrans PeMS Data*



Northern Bridges Closer to Pre-Pandemic Traffic Levels

Source: *MTC Monthly Transportation Statistics*



BART Stations Show Differing Levels of Recovery

Source: *BART Ridership Reports*

Where Growth Occurs Will Shape Future Connectivity

Transit-Rich Areas Contain:

53%
of jobs
(2023)

32%
of residents
(2024)

60%
of newly built housing
(2018-2025)

Source: *LEHD LODES 8 WAC, 2020 Decennial Census, HCD Housing Element APR Data*
Note: *Transit-Rich Areas are defined as Priority Development Areas (PDAs) and places near rail, ferry, or frequent bus service that are not already identified as PDAs.*

Guiding Principle: Healthy

What are the trends and risks affecting the region's ability to become cleaner, safer and more resilient?

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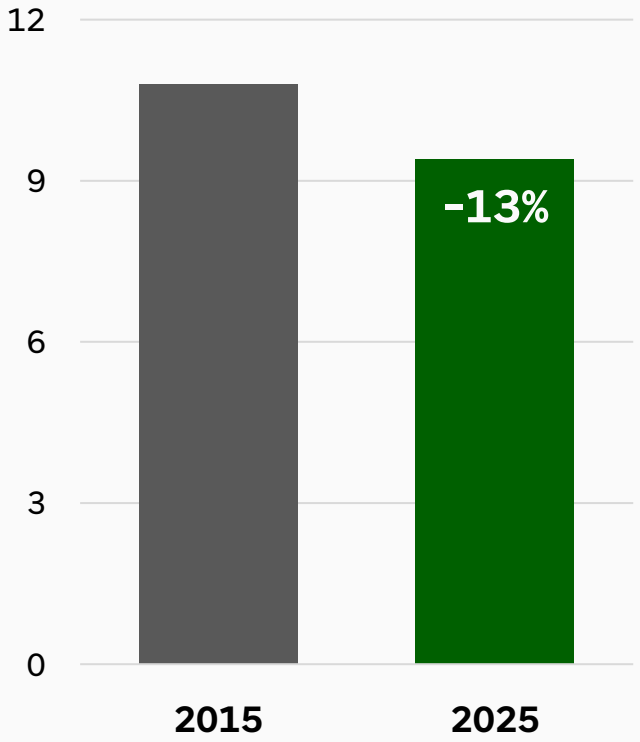
METROPOLITAN TRANSPORTATION COMMISSION

Photo: Ben Botkin

The Region Has Made Progress on Some Environmental Goals

Healthy

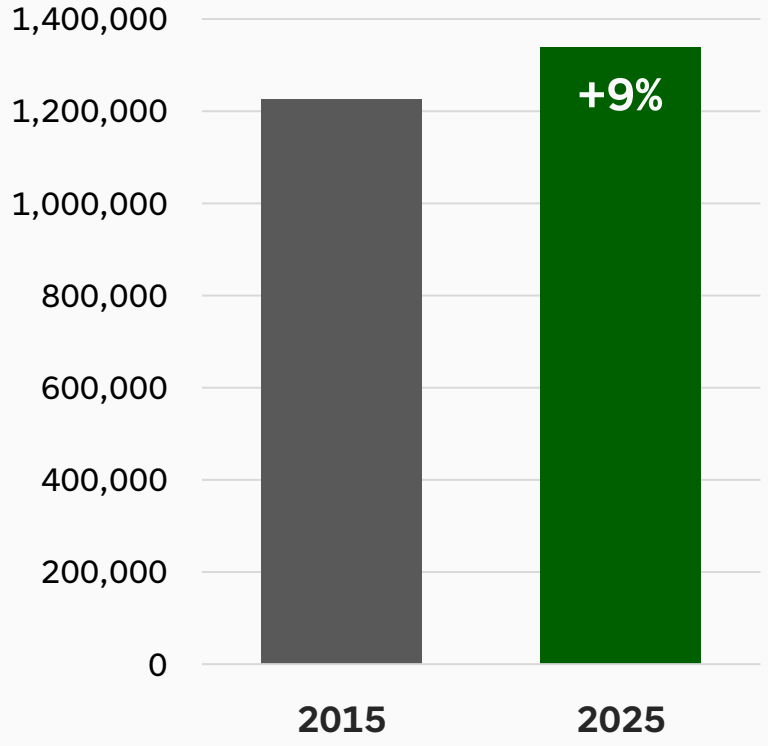
Maximum PM 2.5 Concentrations



Reduced Air Pollution Exposure

Source: *Bay Area Air District (PM2.5 Annual Design Values)*
Notes: *Chart shows the maximum annual design value (in µg/m3) across the 18 regional air quality monitoring sites.*

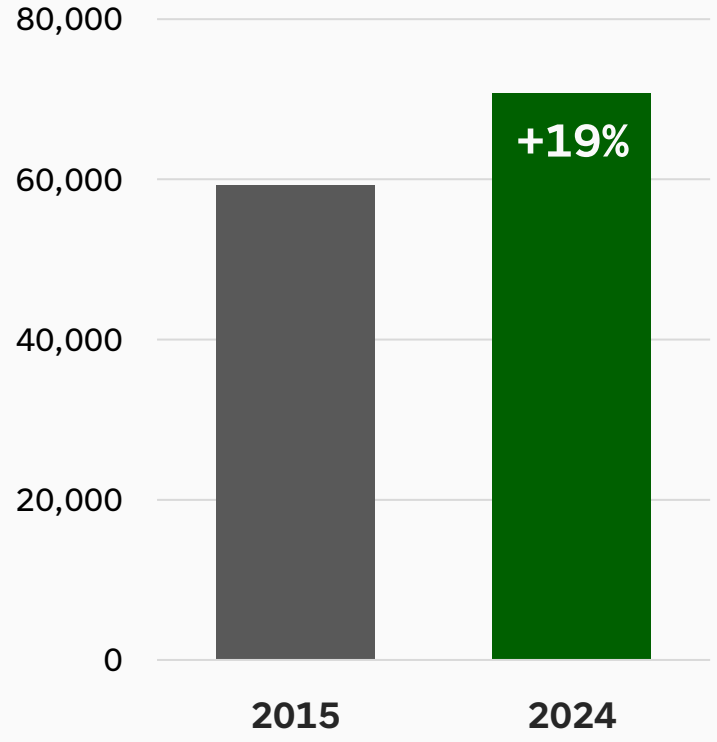
Acres of Conserved Land



Many Habitats Protected Through Conservation Efforts

Source: *Conservation Lands Network (BPAD)*

Acres of Tidal Marsh

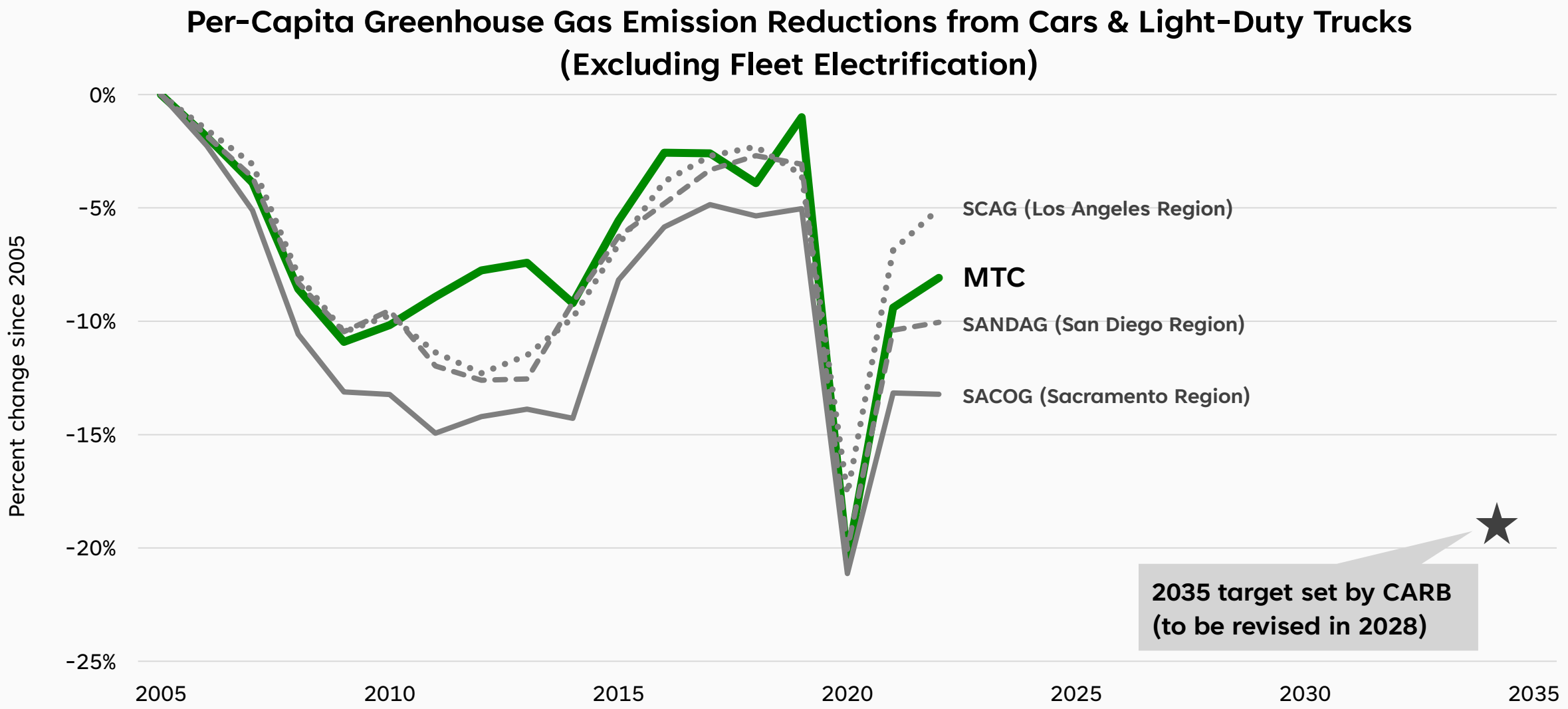


Substantial Restoration Progress Made in the Bay and Delta

Source: *San Francisco Estuary Partnership (State of Our Estuary)*

Transportation Emissions Remain Off-Track for 2035 Goals

Healthy

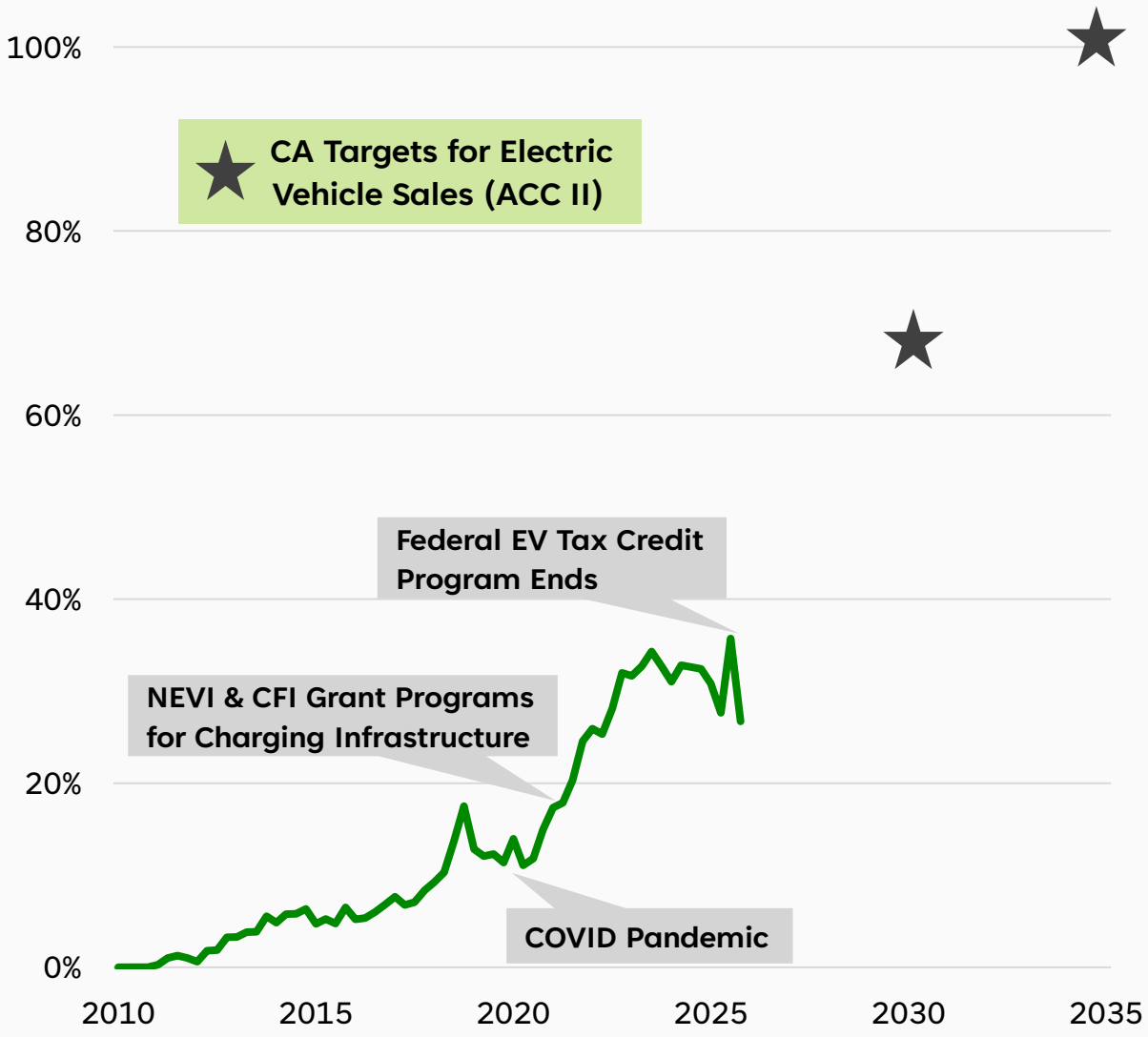


Source: *California Air Resources Board (SB 150 Dashboard)*

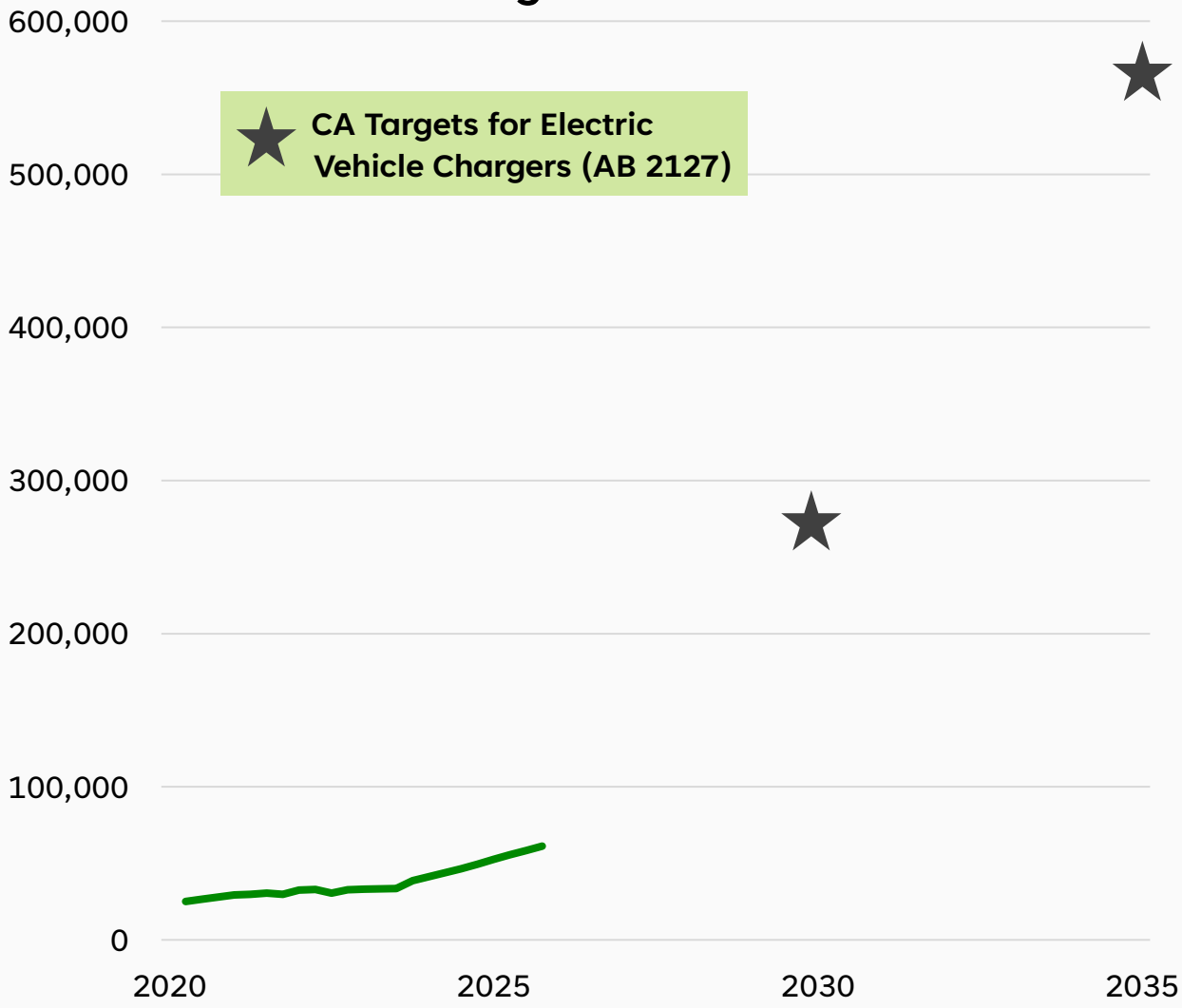
Electrification Is Advancing, but Meeting Targets Remains Uncertain

Healthy

Electric Vehicle Share of New Car Sales



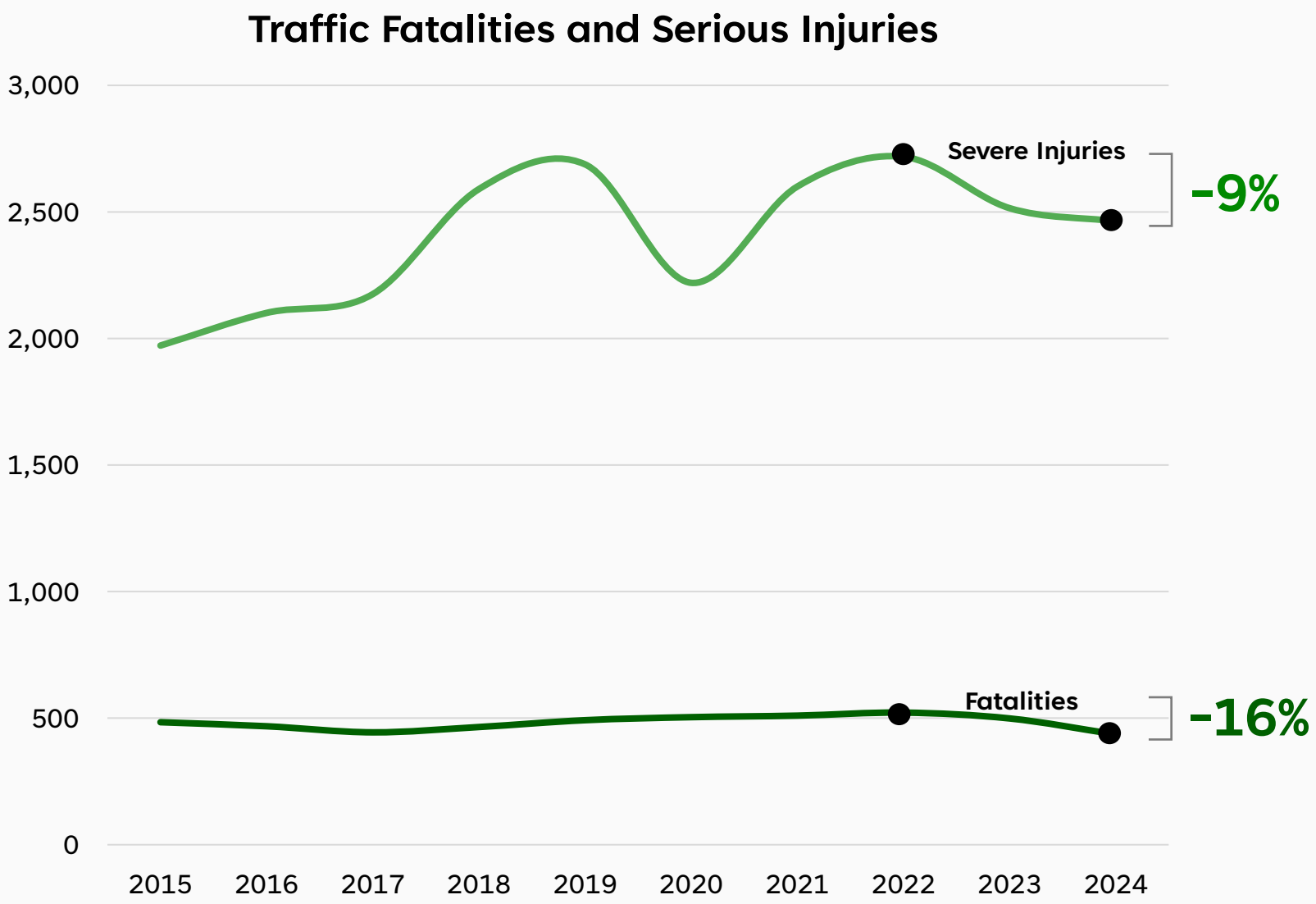
Number of Public and Shared Private EV Chargers Installed



Sources: *CEC ZEV and EV Charger Dashboards, AB 2127 Second Electric Vehicle Charging Infrastructure Assessment*

Traffic Safety Has Improved Slightly, but Roads Remain Hazardous

Healthy



40%

of life-altering collisions involve pedestrians and bicyclists

2.0x

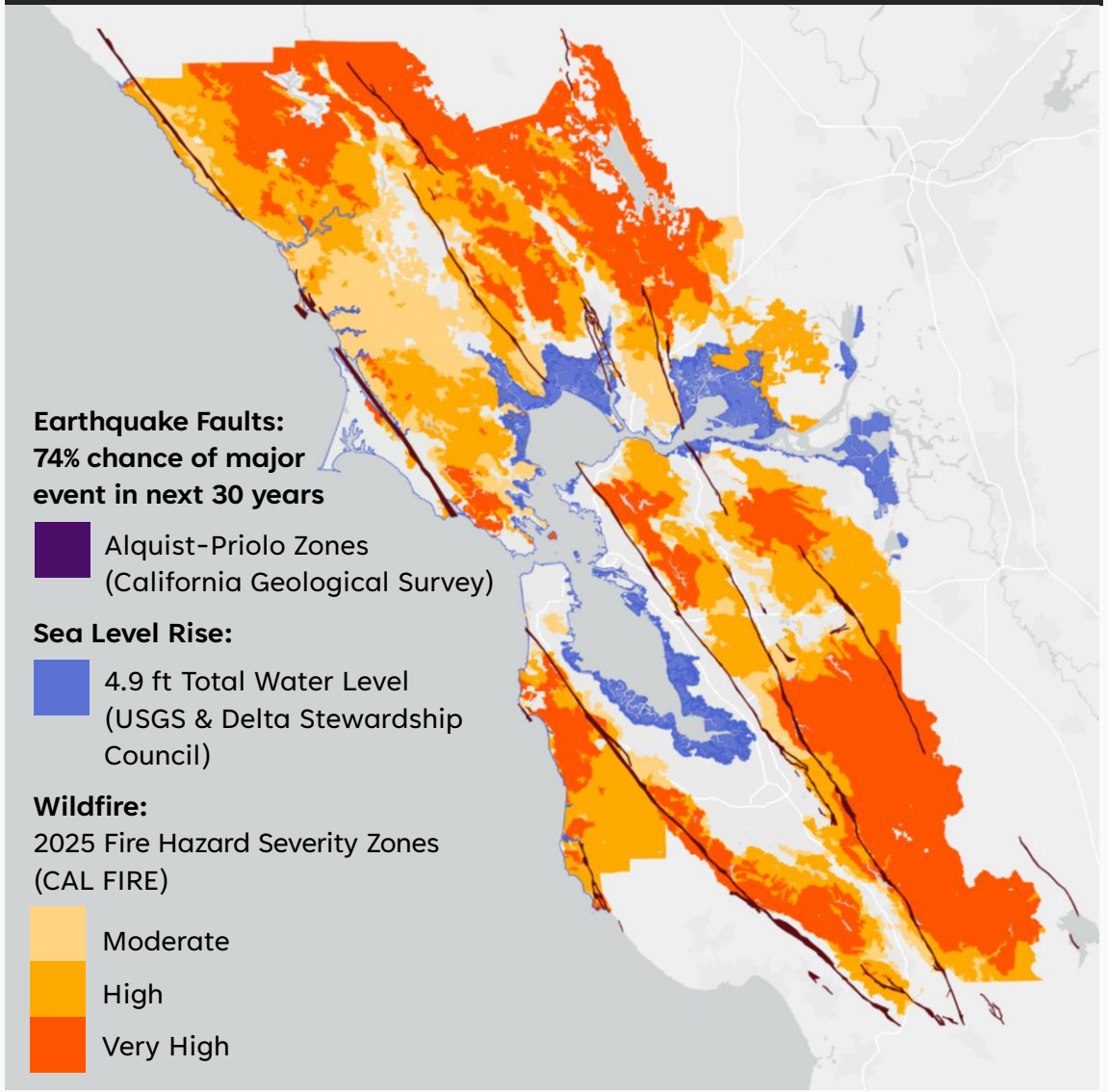
more collisions per square mile in Equity Priority Communities than on average

Sources: *SWITRS via TIMS (Injuries); NHSA FARS (Fatalities), MTC Bay Area Vision Zero Action Plan*

Communities and Infrastructure Are at Risk from Natural Hazards

Healthy

Wildfire, Sea Level Rise & Fault Zones



Areas at risk of sea level rise contain:

4%	7%	5%
of residents (2024)	**of jobs (2023)**	**of new housing (2018-2025)**
Marin – 17% *San Mateo – 17%*	*San Mateo – 37%* *Marin – 23%*	*San Mateo – 26%* *Marin – 12%*

Areas at risk of wildfires contain:

13%	5%	9%
of residents (2024)	**of jobs (2023)**	**of new housing (2018-2025)**
Marin – 50% *Sonoma – 34%*	*Marin – 27%* *Napa – 24%*	*Marin – 44%* *Solano – 33%*

Source: *USGS, CAL FIRE FHSZ, Delta Stewardship Council, ACS 5-year estimates (Table B01003), LEHD (LODES 8 WAC), California HCD Annual Progress Reports (APR) Certificates of Occupancy.*

Notes: *Percentage of new housing uses only mapped APR certificates of occupancy. Areas at risk of wildfire include those in moderate, high, or very high Fire Hazard Severity Zones.*

Guiding Principle: Vibrant

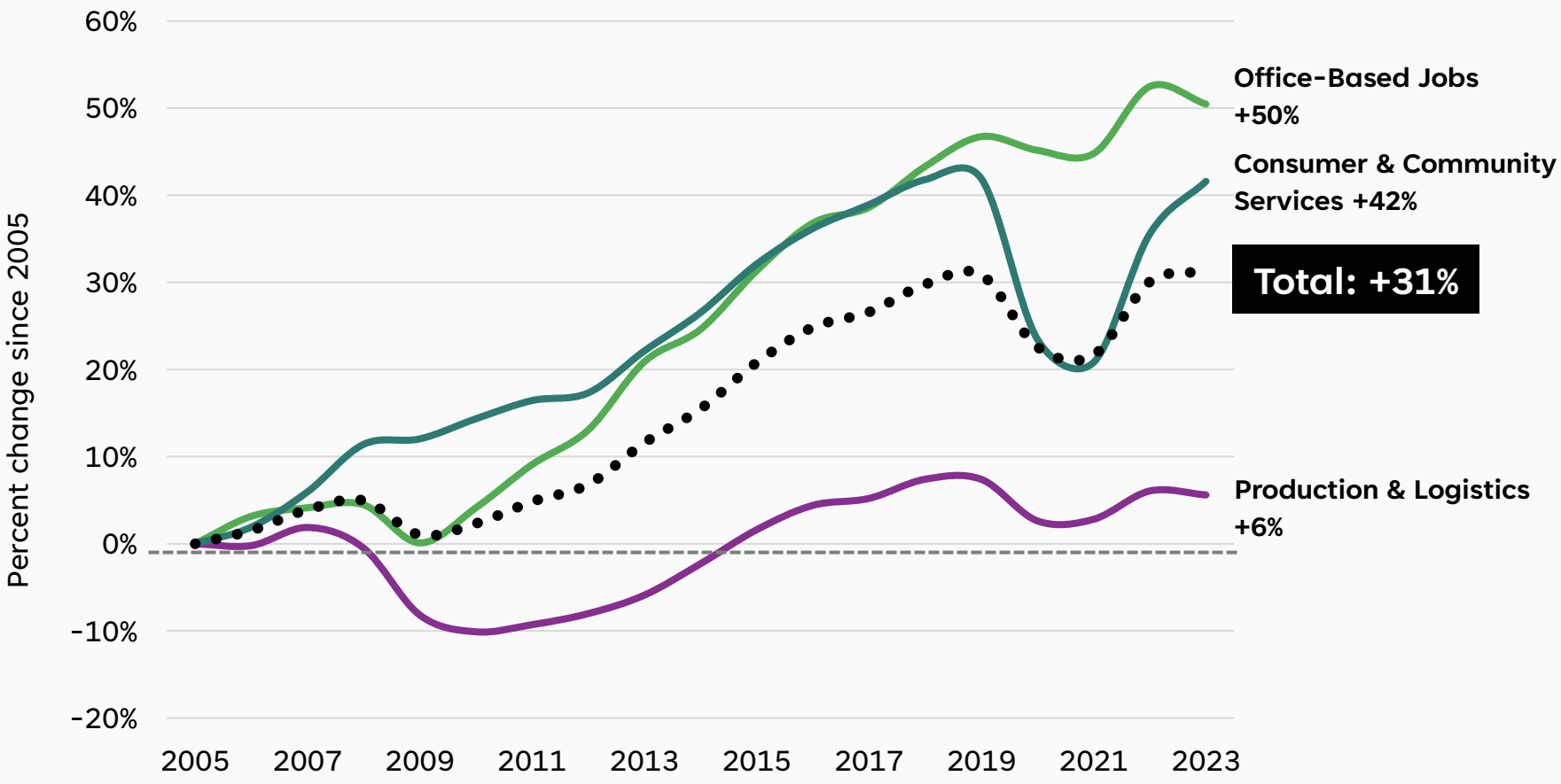
How has the Bay Area's economy changed across boom-and-bust cycles?

Photo: Karl Nielsen

The Economy Has Grown, Led by the Tech & Information Sector

Vibrant

Change in Total Jobs by Industry Group



Source: *Vital Signs – LEHD (LODES 8 WAC)*

Notes: Office-Based Jobs *includes the following sectors: Tech & Information (+173%), Public Administration (+60%), Professional & Business Services (+46%), and Financial Activities (-2%);* ***Consumer and Community Services*** *includes the following sectors: Educational & Health Services (+67%), Leisure & Hospitality (+26%), and Other Services (-16%);* ***Production & Logistics*** *includes the following sectors: Construction (+20%), Manufacturing (+11%), Farming & Agriculture (-1%), and Trade, Transportation & Utilities (-1%)*

Fastest Growing Sector: Tech & Information

+173K jobs

(2005 – 2023)

Largest Sector: Educational & Health Services

913K jobs

(2023)

Smallest Sector: Farming & Agriculture

19K jobs

(2023)

Growth Has Been Concentrated in Particular Sectors and Subregions

Vibrant

Between 2005 and 2023, the number of jobs per working-age capita changed...

↗ Professional & Business Services

↘ Transportation, Trade & Utilities

↗ Education & Health Services

↘ Other Services

↗ Education & Health Services

↘ Financial Activities

↗ Education & Health Services

↘ Financial Activities

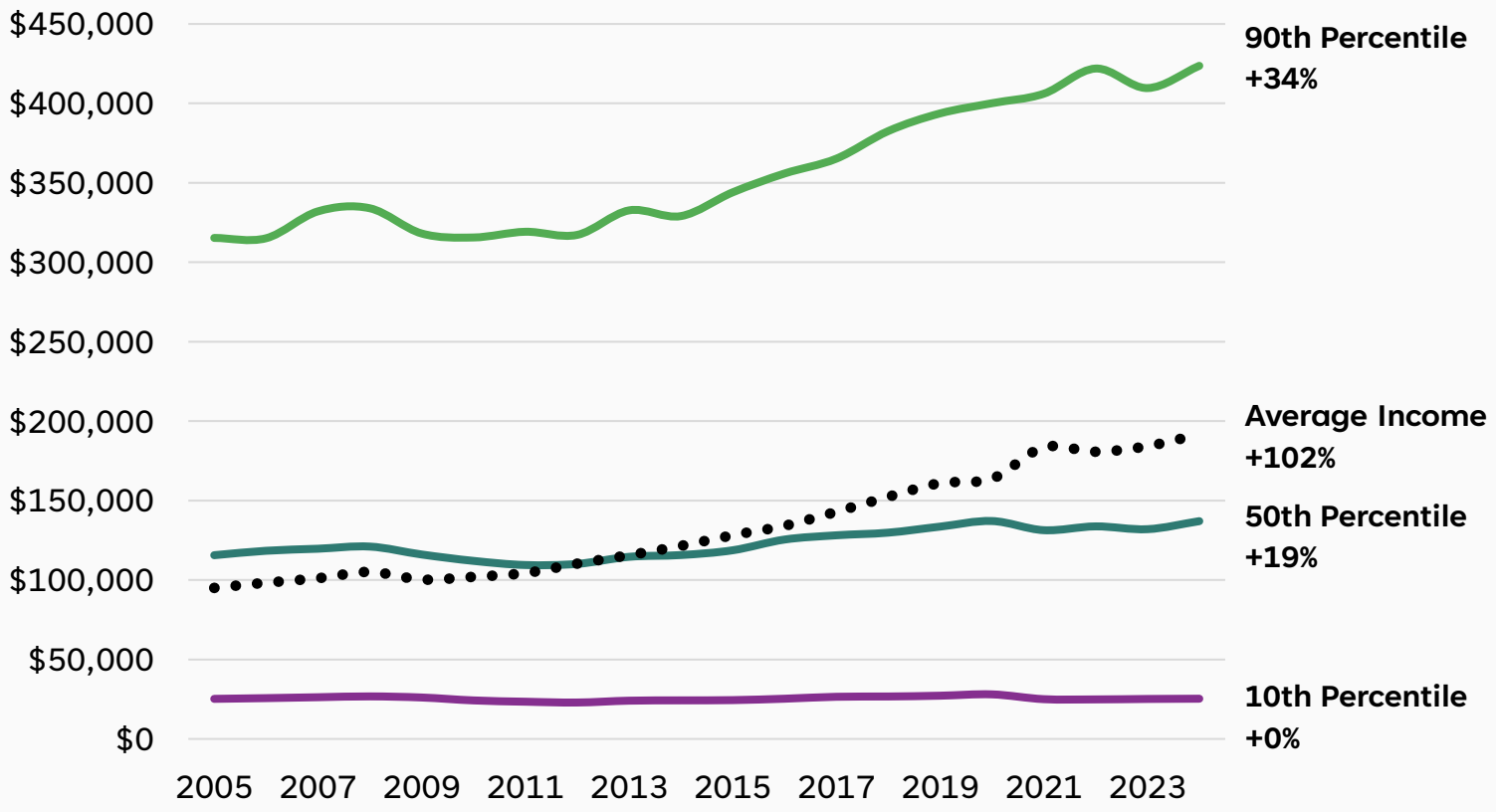
Source: *Vital Signs – LEHD (LODES 8 WAC), ACS 1-year estimates (Table B23001)*

Notes: *Workers are defined as those aged 16 years or older, not in the armed forces. Sectors with most growth and decline by subregion are by absolute number of jobs. Other Services includes Repair and Maintenance; Personal and Laundry Services; Religious, Grantmaking, Civic, Professional, and Similar Organizations; and Private Households.*

Economic Growth Has not Been Shared Evenly Across Groups

Vibrant

Income by Percentile (Inflation-Adjusted, $2024)



Source: *Vital Signs – ACS (Public Use Microdata Sample), ACS 1-year estimates (Tables B03002, B19013, B24031), BLS Consumer Price Index*

Notes: *County-based data on median income by race and ethnicity were aggregated to the regional level using population-weighted averages. Racial groups include Latino and non-Latino individuals, except White, which is non-Latino White individuals only. All values have been inflation-adjusted to 2024 dollars.*

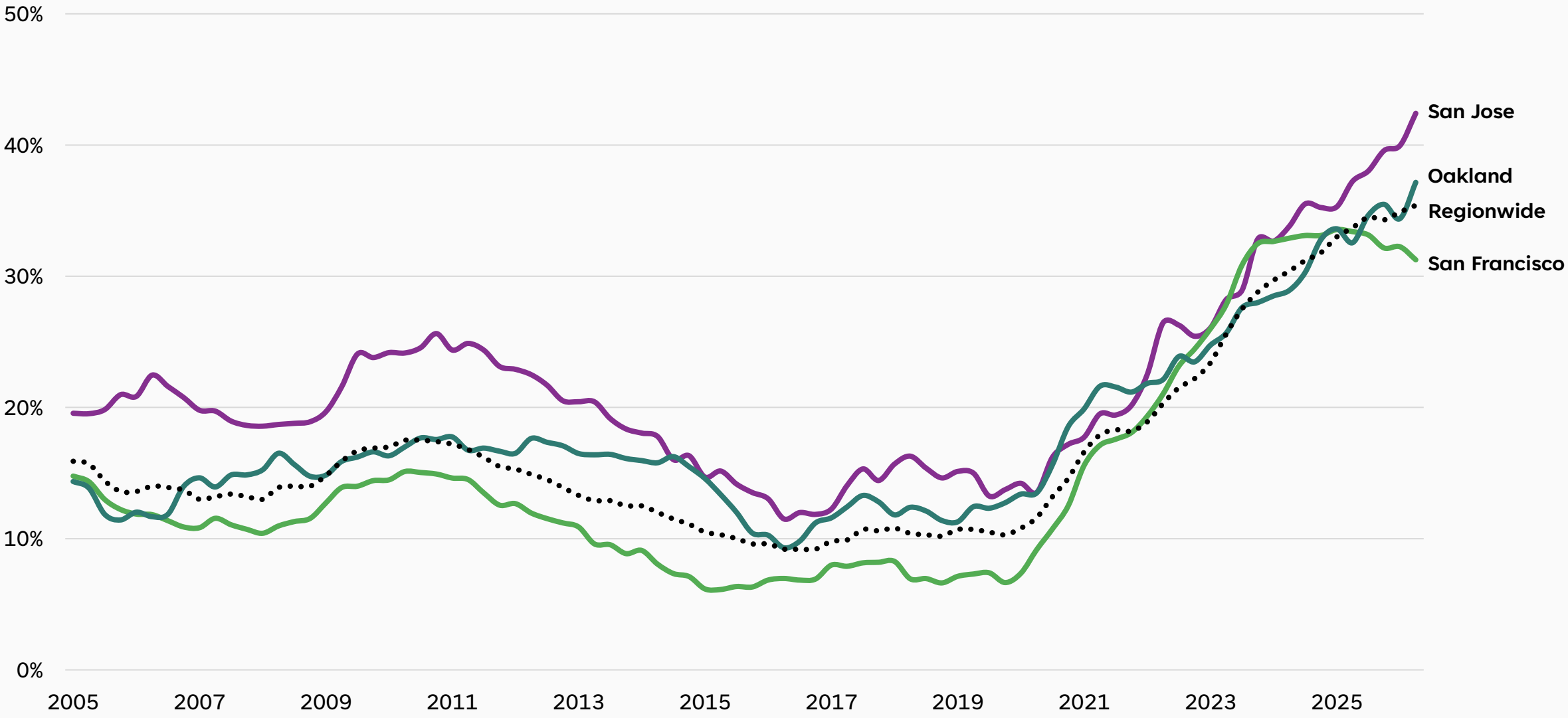
Income (2024) and Income Growth (2005-2024) by Race & Ethnicity

$178K	Asian & Pacific Islander (+36%)
$151K	Multiple Races (+17%)
$123K	Non-Latino White (+16%)
$101K	Latino (+17%)
$92K	Other Races (+7%)
$80K	Black (+9%)

While Job Growth Continues, Demand for Office Space Remains Low

Vibrant

Office Vacancy Rate by Square Footage

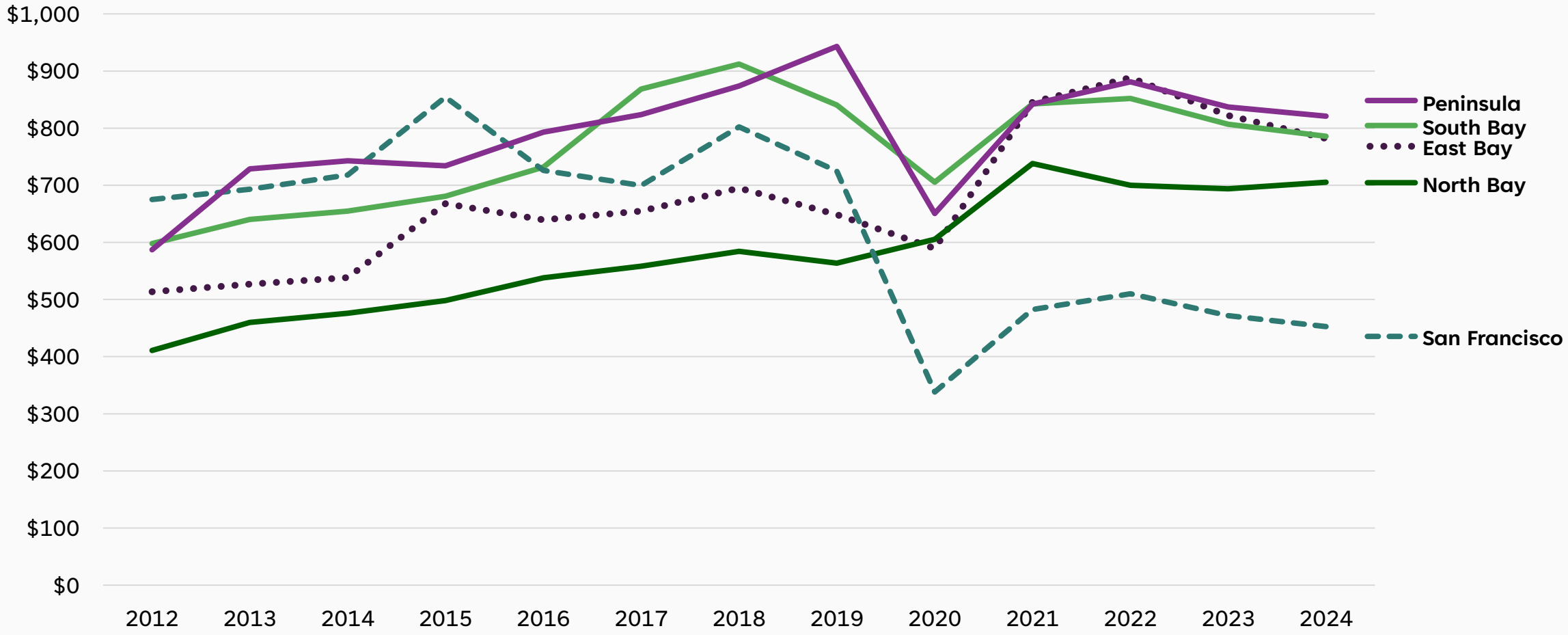


Source: *CoStar Vacancy Data*

Sales Tax Revenue Growth Has Varied Across Counties

Vibrant

Per Capita Sales Tax Revenue by Subregion (Inflation-Adjusted, $2024)



Source: *CA Dept of Tax and Fee Administration (Tables 21A, 21B, 21C), BLS Consumer Price Index.*

Notes: *Taxes shown here include the local Bradley-Burns tax, county transportation taxes, and district taxes. For districts spanning multiple counties, tax revenue distribution was split evenly among the counties. All values have been inflation-adjusted to 2024 dollars.*

Guiding Principle: Diverse

How has the region's socio-economic landscape changed?

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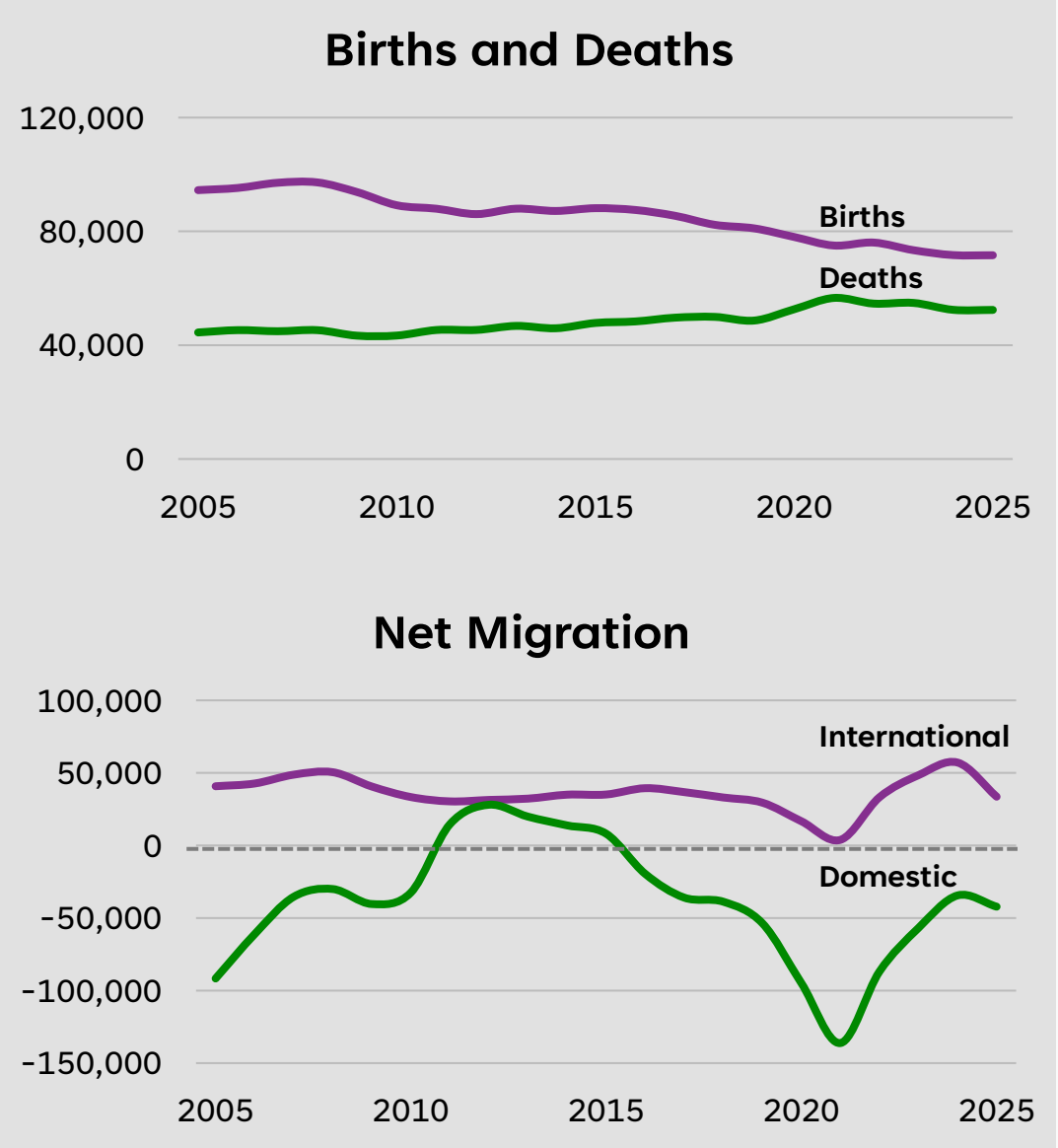
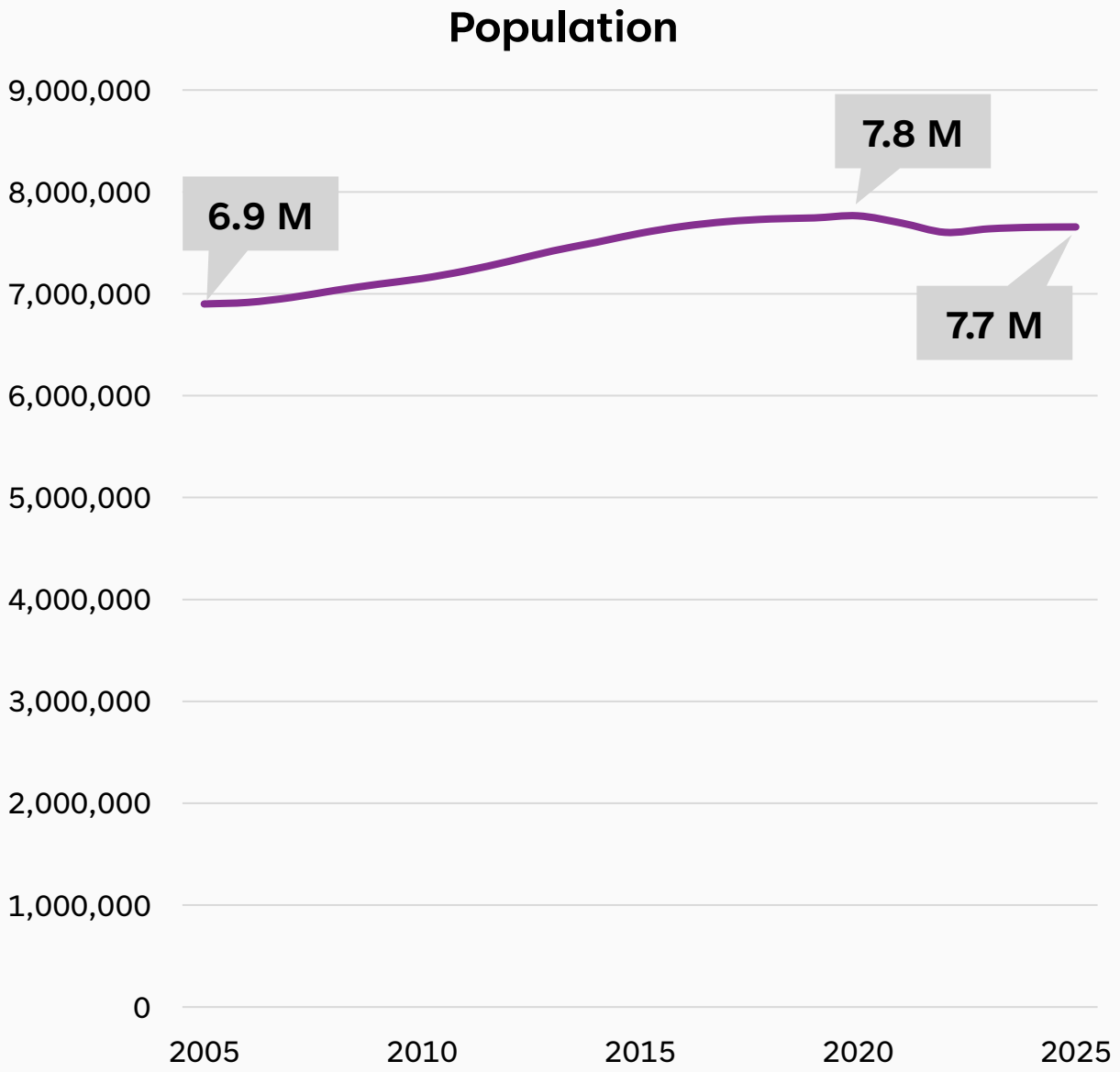
METROPOLITAN TRANSPORTATION COMMISSION

Photo: Noah Berger

While the Population Is Rising, Growth Has Slowed in Recent Years

Diverse

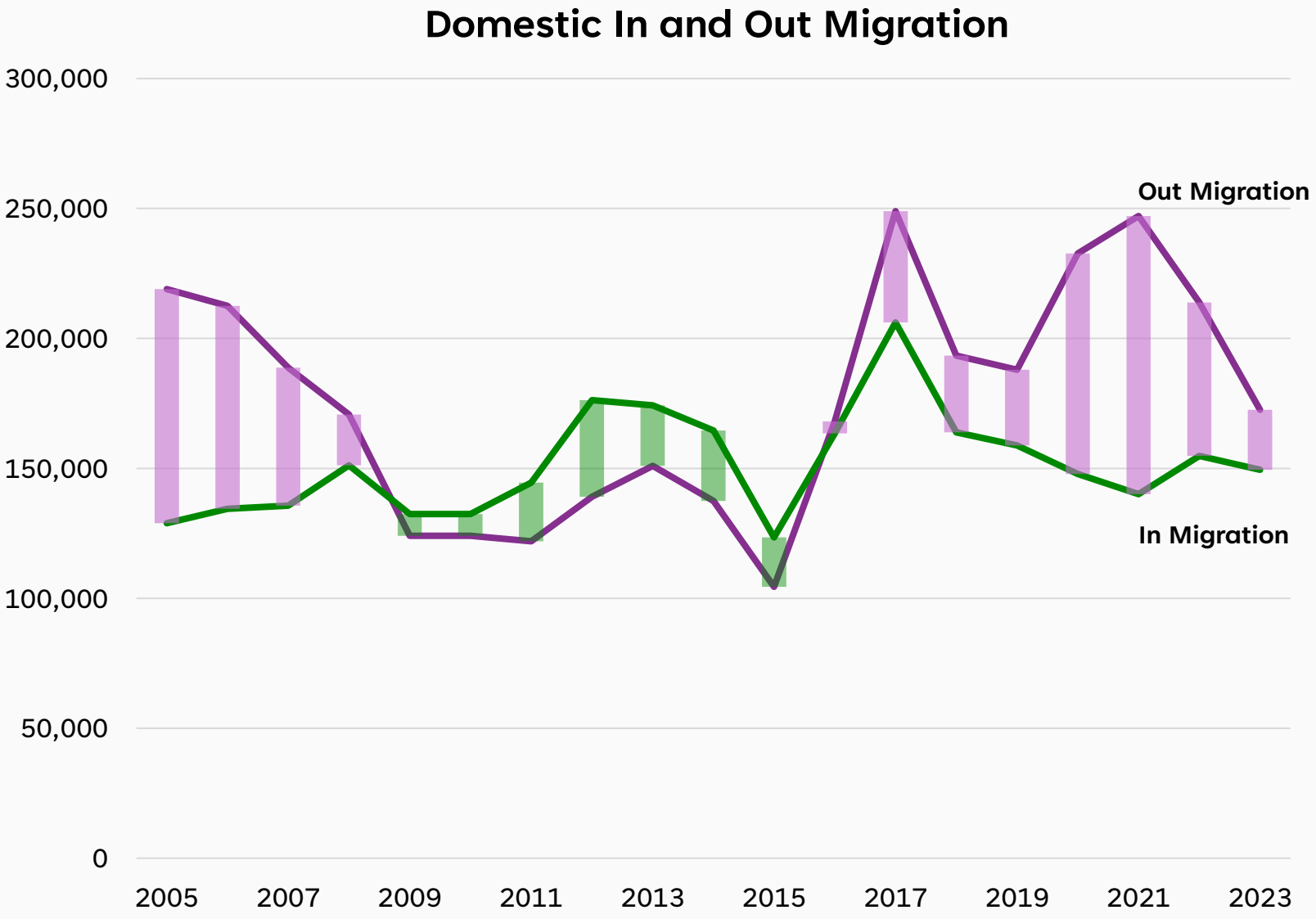




Source: *Department of Finance (Tables E-2, E-4)*

Domestic Out Migration Is Driving the Recent Slowdown

Diverse



For International Immigrants...

63%
come from Asia
(+7% since 2010)

22%
come from Latin America
(-8% since 2010)

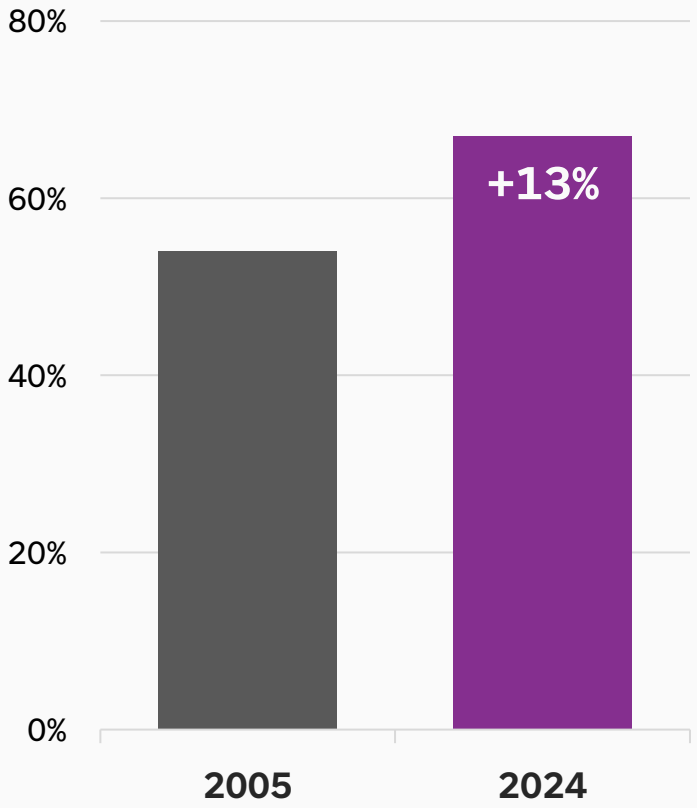
8%
come from Europe
(+0% since 2010)

Source: *IRS (SOI Tax Stats – Migration Data), ACS 5-year estimates (Table B05015)*

The Region's Population Has Become More Diverse and Older

Diverse

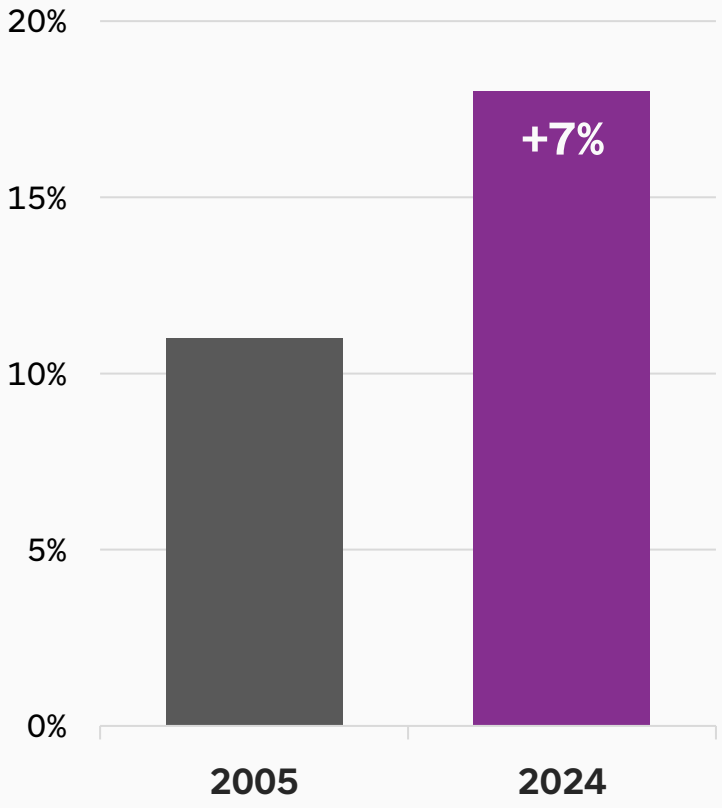
Non-White Population



Increased Racial & Ethnic Diversity

Source: *ACS 1-year estimates (Table B02003)*

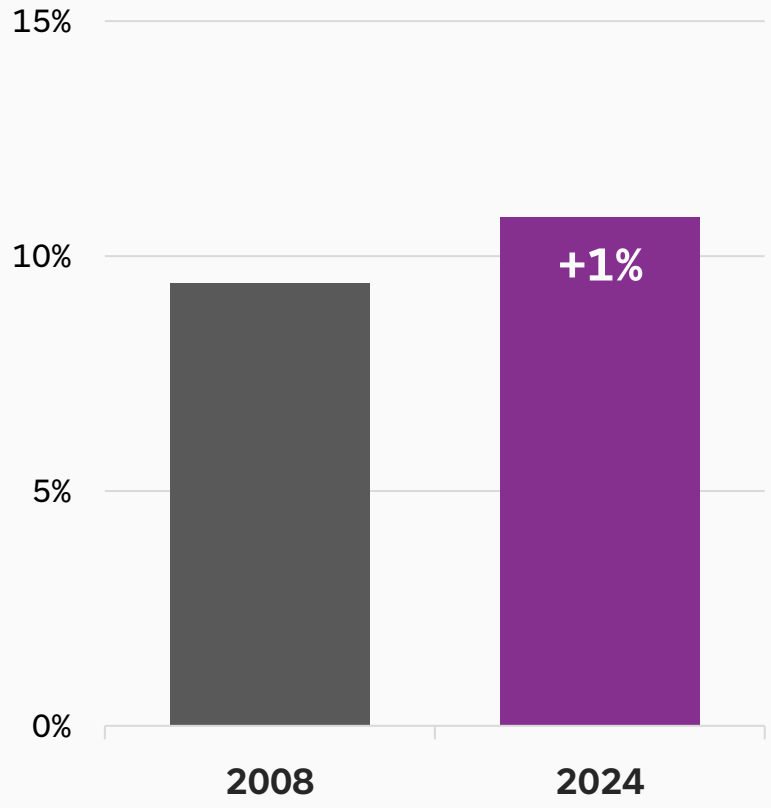
Senior (65+) Population



Growing Senior Population

Source: *ACS 1-year estimates (Table B01001)*

Population with Disabilities



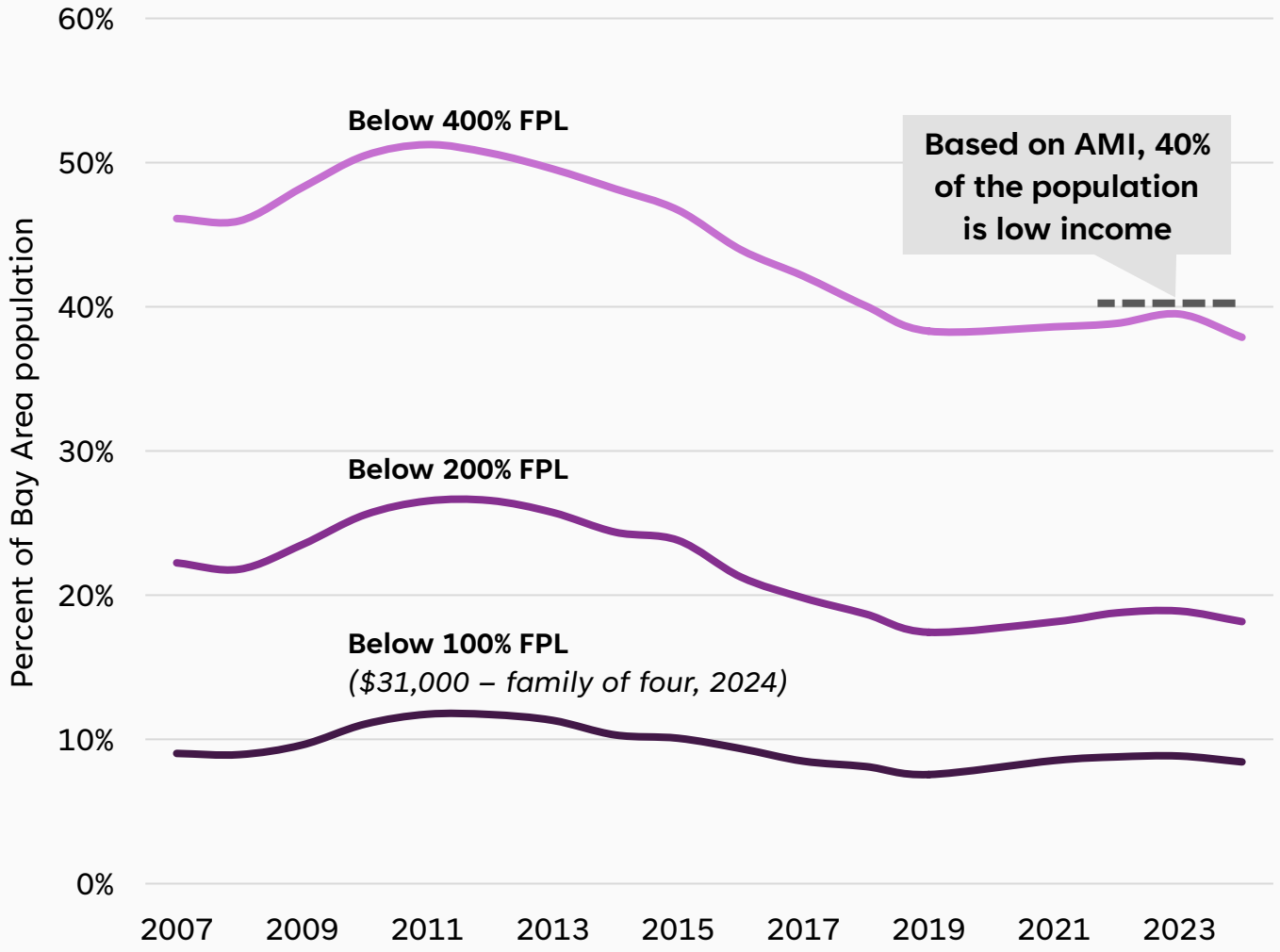
10% Population Share with Disabilities

Source: *ACS 1-year estimates (Table B18101)*

Poverty Rates Have Declined, but Mask the High Cost of Living

Diverse

Share of Population Below Federal Poverty Level Limits



Source: *ACS 1-year estimates (Table C17002), ACS (Public Use Microdata Sample)*

Share Below 200% Federal Poverty Level:

29% of Black people

26% of Latino people

20% of seniors

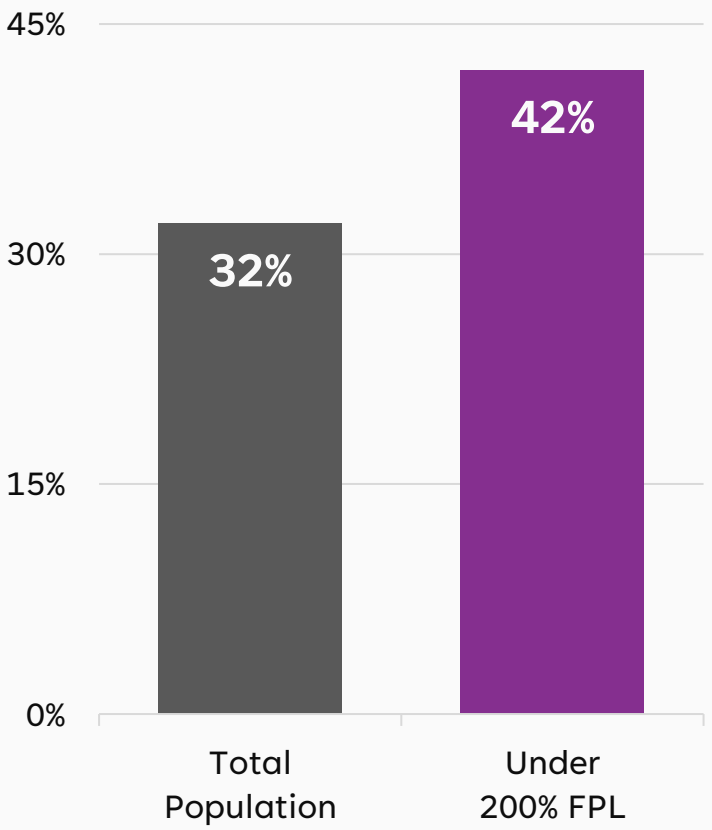
32% of people with disabilities

compared to **16%** of total population

Residents With Low Incomes Experience Mixed Outcomes

Diverse

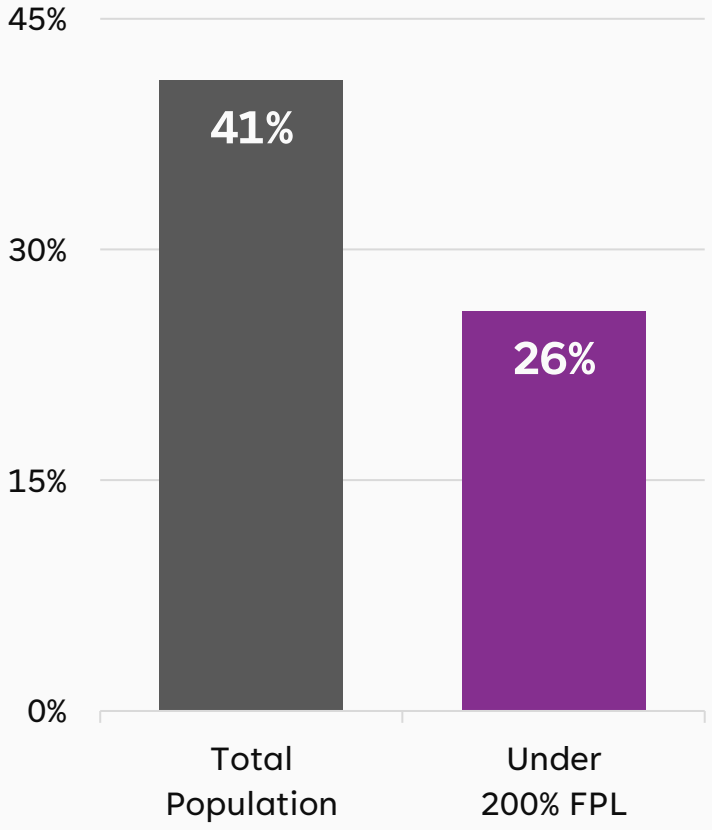
Share of Population in Transit Rich-Areas (2024)



Greater Access to Public Transit

Source: *ACS 1-year estimates (Table C17002)*

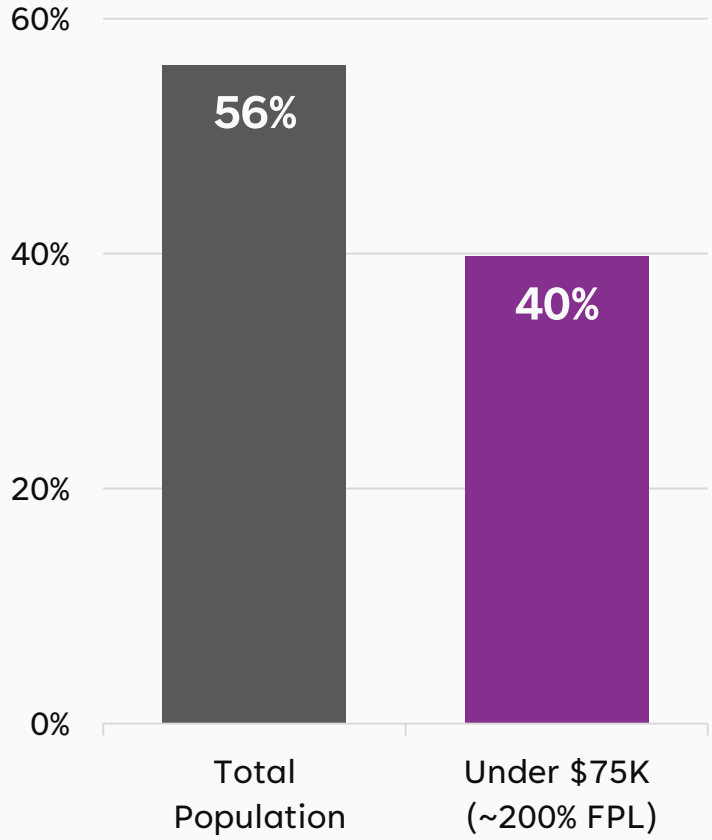
Share of Population in High-Resource Areas (2024)



Lower Access to High-Resource Areas

Source: *ACS 1-year estimates (Table C17002)*

Home Ownership (2024)



Lower Home Ownership Rates

Source: *ACS 1-year estimates (Table B25118)*

Grounding Future Plans in Today's Realities: Key Takeaways

High housing costs — compounded by other rising costs — continue to make life unaffordable for many residents.

Transportation needs have evolved post-pandemic, with changing volumes and persistent congestion.

The region has made progress toward some **environmental goals**, but traffic safety, climate change and natural hazards continue to pose risk.

The region has **recovered pandemic-era job losses** and the average income has risen, but those gains have been uneven.

The region has become increasingly diverse, however, residents with low incomes — disproportionately Black residents and people with disabilities — continue to experience barriers to opportunity.

Discussion and Q&A

NEXT UP

Panel Discussion: Perspectives on the Bay Area's Future

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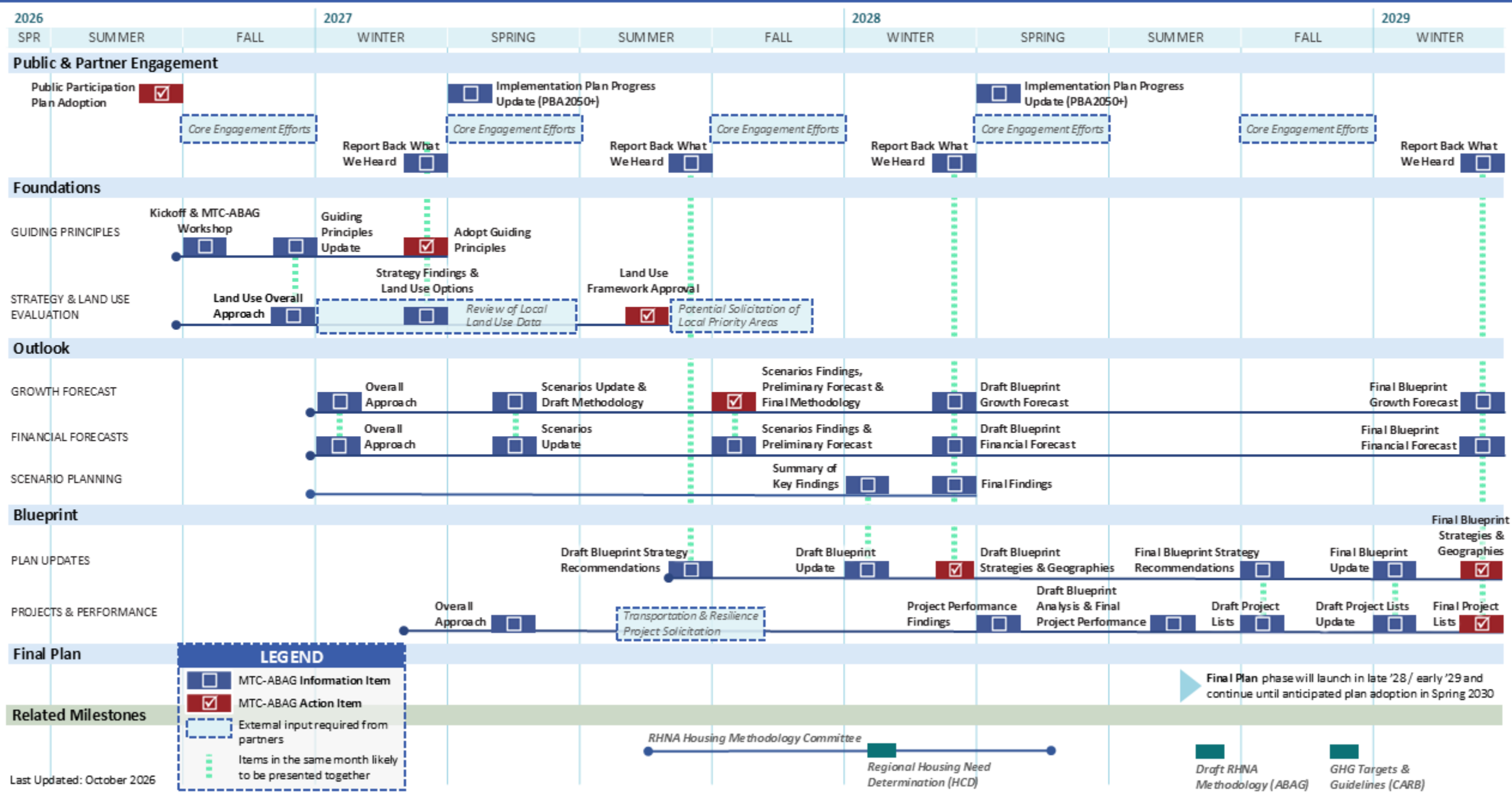
METROPOLITAN TRANSPORTATION COMMISSION

Photo: Ben Botkin

Plan Bay Area 2060: Detailed Timeline Overview

Tentative — subject to change



Metropolitan Transportation Commission-
Association of Bay Area Governments Workshop (Day 2)

October 29, 2026 **Agenda Item 3a-26-2208**

Moderated Expert Panel and Discussion

Subject:

Following the staff presentation, the Commission and the ABAG Executive Board will hear from a moderated panel of regional experts, followed by a facilitated discussion over lunch.

Background:

Building on the staff presentation, a moderated panel of regional experts will offer further insight into the conditions shaping the Bay Area today and in the future. The panel is intended to enrich the conversation about the region's future and where progress is possible through planning, policy and implementation. The moderator and panelists are:

- **Cecilia Lei**, moderator, is a reporter, producer and live-events host with COYOTE Media Collective, a worker-owned Bay Area newsroom covering immigration, the criminal legal system, AAPI communities and regional life. She previously served as executive producer and host of the San Francisco Chronicle's flagship daily news podcast, Fifth and Mission. A graduate of UC Berkeley's Graduate School of Journalism, she is a former president of the Asian American Journalists Association's San Francisco Bay Area chapter.

- **Ruby Bolaria Shifrin** is Chief Investment and Partnership Officer at Terner Labs, a nonprofit affiliated with UC Berkeley's Terner Center for Housing Innovation that develops and scales solutions to make housing more affordable, including new approaches to housing finance and construction. She is the first to hold the role, leading the organization's investment and partnership strategy. She previously served as Vice President and Head of Community at the Chan Zuckerberg Initiative, where she led work on housing affordability, economic inclusion and local impact, and earlier managed mixed-income multifamily development in San Francisco. Her expertise spans housing affordability, housing finance and the systems that shape how homes get built.

- **Joshua Schank** is Managing Partner at InfraStrategies, a transportation advisory firm, as well as Executive Director of the ACES Mobility Coalition, a national organization that advances the

safe and equitable deployment of autonomous, connected, electric and shared mobility in public transit. He is also a Senior Fellow at the UCLA Institute of Transportation Studies. He previously served as the first Chief Innovation Officer at the Los Angeles County Metropolitan Transportation Authority, where he created its Office of Extraordinary Innovation and launched pilots in on-demand transit and new mobility. His expertise centers on transportation innovation, emerging mobility technologies and public-sector strategy.

- **Russell Hancock** is President and CEO of Joint Venture Silicon Valley, a nonprofit that brings together leaders from business, government, labor and academia to analyze and act on the region's challenges. Through its Institute for Regional Studies, the organization publishes the annual Silicon Valley Index, a nonpartisan report that tracks more than 150 indicators of the region's economy, population and quality of life. Hancock has led the organization since 2003, founded its annual State of the Valley conference and is a recognized voice on the Bay Area's economy and demographic change. He holds a Ph.D. in political science from Stanford University, where he teaches in the Public Policy Program.

Following the panel and the opportunity for members to engage the experts directly, the joint boards will break for lunch. Over lunch, external facilitator Janette S. Williams of The Centre for Organization Effectiveness will lead the Commission and the ABAG Executive Board through a robust, nearly two-hour facilitated discussion, giving members the opportunity to provide early input on the priorities that should shape Plan Bay Area 2060. During the discussion, members may refer to a staff-provided worksheet of discussion questions, shown in **Attachment A**.

Next Steps:

Staff will synthesize the input from the discussion and carry it into the development of Plan Bay Area 2060.

Issues:

None identified.

Attachments:

- Attachment A: Supplementary Handout — Day 2 Discussion Worksheet

Andrew B. Fremier, Executive Director

METROPOLITAN TRANSPORTATION COMMISSION
ASSOCIATION OF BAY AREA GOVERNMENTS

Bay Area Metro Center
375 Beale Street
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2026 MTC-ABAG Workshop

Plan Bay Area 2060 Kickoff Discussion Worksheet

October 29, 2026

Use this worksheet to capture your questions and observations during the discussion.

During the expert panel

The moderator will ask the panelists to consider questions such as the ones below. Note what you hear and any questions you would like to raise with the panel.

- What current or emerging development in your field should regional leaders take most seriously?
- Where is regional leadership best positioned to address the region's biggest challenges, including affordability?
- What promising policy, planning or institutional approach should the region consider?

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Facilitated discussion

You will be asked the following questions during the facilitated discussion. Throughout the workshop, we encourage you to note any thoughts related to these questions in the spaces provided below.

1. **Given all the data presented on existing conditions in the Bay Area today, and your perspectives as local leaders, what challenges stand out to you as top priorities to tackle as we develop Plan Bay Area 2060?**

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2. How can staff best support you with the knowledge you need to make informed decisions as we develop Plan Bay Area 2060?