PLAN SAN RAMON

General Plan • Housing Element • Climate Action Plan

CITY OF SAN RAMON GENERAL PLAN UPDATE

# Existing Conditions and Trends Workbook

MARCH 2022

# TABLE OF CONTENTS

# List of Figures

# List of Tables


PLAN
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# 1. INTRODUCTION

*The State mandates that every city and county adopt a general plan to guide future growth and development. The State also requires all specific plans, subdivisions, public works projects, and zoning decisions to be consistent with the general plan. General plans are typically updated every 10 to 20 years to respond to the changing needs of the community and changes in State law. The City's last comprehensive General Plan update was adopted in 2011 with a 20-year vision establishing the blueprint for the City's orderly growth and development. After 10 years, the City has decided to revisit the General Plan to ensure the policy direction for the future is representative of current community values and is responsive to the changes of the next decade and beyond.*

*This section provides an introduction to the General Plan process, an outline of new State laws affecting general plans, a brief history of San Ramon, and a description of important planning boundaries.*

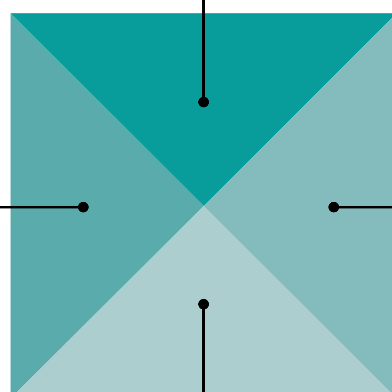
# What is in a General Plan?

A general plan represents the community's aspiration for its future and establishes the local government's long-term framework for future growth and development. The general plan contains the goals and policies upon which the City Council and Planning Commission will base their land use and resource decisions. Typically, a general plan is designed to address the issues facing the City for the next 20 years.

The general plan is made up of a collection of "elements," or topics. The existing General Plan has eight State mandated elements: land use, open space, conservation, noise, environmental justice, circulation, safety, and housing. Additionally, the General Plan includes six optional elements that address topics of local concern: economic development, growth management, parks and recreation, public facilities and utilities, and air quality and greenhouse gas.

A general plan has four defining features:

**General** – Provides general policy guidance for future land use, transportation, environmental, and natural resource decisions.



**Comprehensive** – Addresses a broad range of topics, including land use, housing, economic development, infrastructure, public safety, recreation, and natural resources.

**Long-Range** – Provides guidance for achieving a future envisioned 20 or more years into the future.

**Integrated and Coherent** – Provides assumptions and projections to assess future demands for housing, employment, and public services. Provides policies and implementation programs that enable citizens to understand the vision of the City and how policies will be implemented.

## What is the Existing Conditions and Trends Workbook?

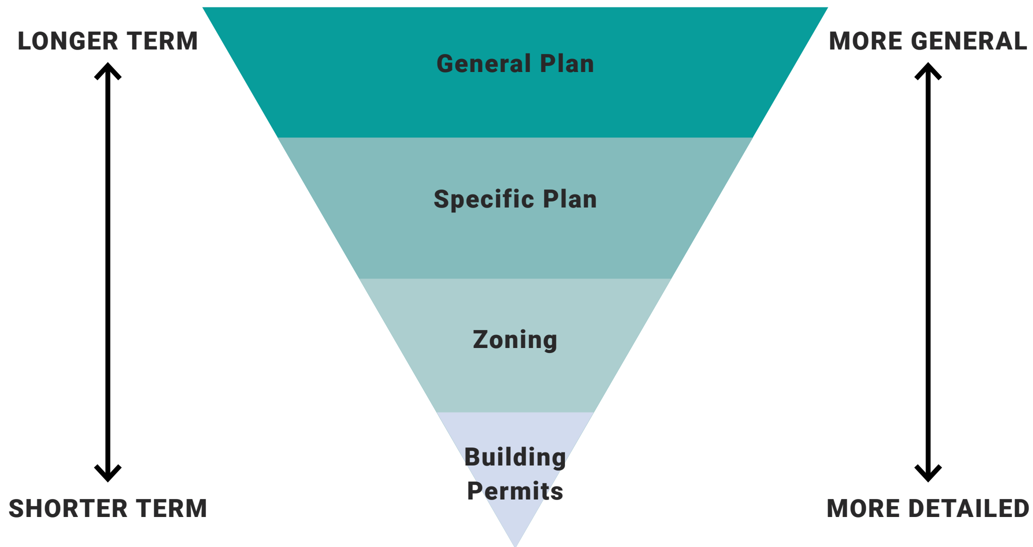
This workbook tells the story of San Ramon – where it has been, where it is today, and the trends that will shape its future. This workbook focuses on providing the foundational information about the physical, natural, cultural, and economic conditions and trends that sets the stage for updating the General Plan.

# What is the Difference between the General Plan and Zoning?

A general plan is distinct from zoning. Although both the general plan and the zoning ordinance designate how land may be developed, they do so in different ways. A general plan has a broad, long-term outlook that identifies the types of development that will be allowed, the spatial relationships among land uses, and the general pattern of future development. A zoning ordinance regulates development through specific standards such as lot size, building setbacks, height, and allowable uses.

Under State law, all planning documents maintained, prepared, or approved must be found to be consistent with the adopted general plan for the jurisdiction. This relationship is illustrated on Figure 1-1. For land use, zoning is a key tool used to implement a general plan. Zoning supports implementation of the general plan and, therefore, must be consistent with the general plan. Upon adoption of the updated general plan, a jurisdiction may need to amend the zoning ordinance and zoning map to ensure consistency with the adopted general plan. Development projects must not only meet the specific requirements of the zoning ordinance, but also the broader policies set forth in the general plan.

**FIGURE 1-1: RELATIONSHIP BETWEEN THE PLANS**



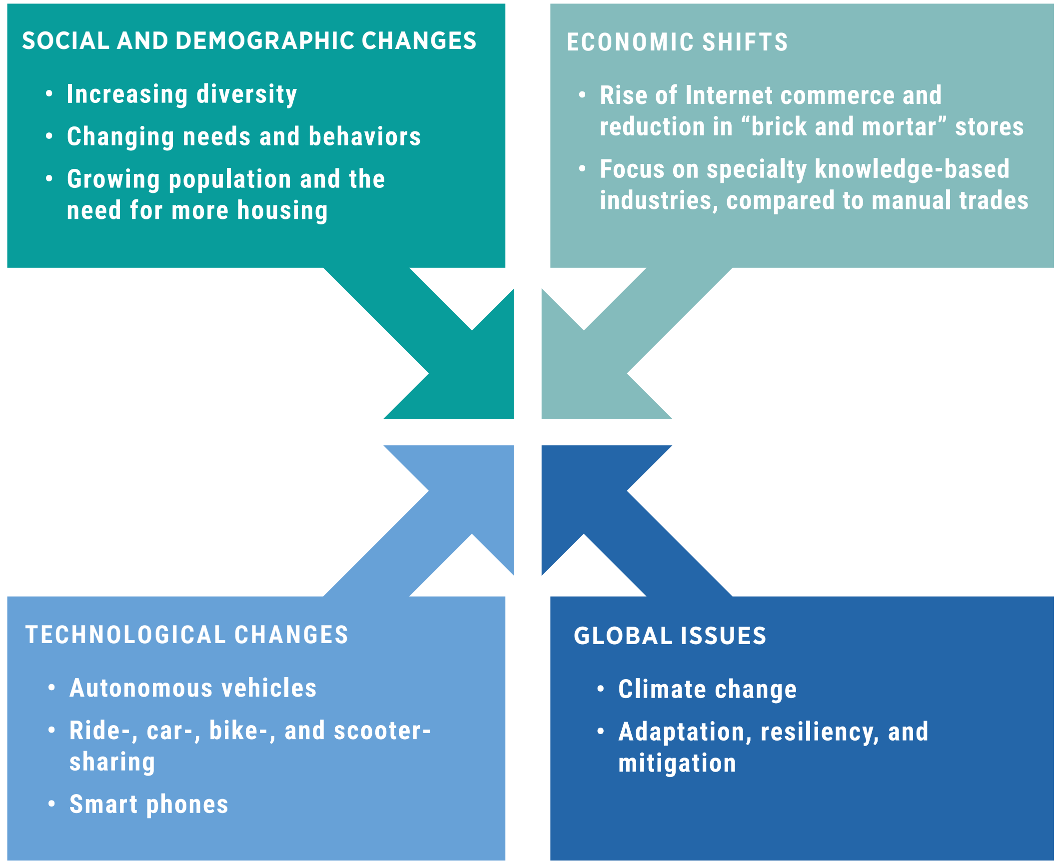
# Why Should We Update the General Plan?

The City's last comprehensive General Plan update was adopted in 2011. As part of that update, the City adopted a new Air Quality/Greenhouse Gas Element and Climate Action Plan (CAP). The City's current General Plan (2035) was adopted in 2015, with a focus on internal consistency with the 5th cycle Housing Element update. San Ramon's current Housing Element was adopted and certified as part of the 2015 update. While San Ramon's existing General Plan remains a valuable policy guidebook for development, the City and community priorities have evolved. In light of a changing economic landscape and recent updates to State laws, the City is initiating a comprehensive General Plan update, along with necessary changes to the Zoning Ordinance, Housing Element, and Climate Action Plan.

Because the City's current General Plan is more than a decade old, there are several topics that should be addressed to keep the General Plan relevant and consistent with State law (see Figure 1-2).

- To meaningfully engage the community. The General Plan is a pivotal opportunity to bring the community together to learn and collaborate to define a common vision and priorities for the future.
- To address major changes from the past two decades and prepare for shifts on the horizon.
- To address new State laws (see next page for details).

**FIGURE 1-2: TOPICS TO ADDRESS STATE LAW**



# Notable New State Laws

**ASSEMBLY BILL (AB) 32 (2006) AND SENATE BILL (SB) 32 (2017)**

- To reduce statewide greenhouse gas (GHG) emissions to 1990 levels by 2020
- To reduce statewide GHG emissions 40 percent below 1990 levels by 2030

**SB 244 (2011)**

- SB 244 (Wolk, 2011) requires cities and counties to address the infrastructure needs of unincorporated disadvantaged communities in city and county general plans

**SB 743 (2013)**

- To use vehicle miles traveled (VMT) as the metric to evaluate environmental impacts to more appropriately balance congestion management with infill development, active transportation, and GHG emissions reduction

**AB 52 (2014)**

- To identify and minimize substantial adverse change(s) to significant tribal cultural resources during the CEQA analysis

**SB 1000 (2016)**

- To identify disadvantaged communities and develop measures to reduce health risks and to promote civic engagement in the public decision-making process

**CALIFORNIA 2017 HOUSING PACKAGE***

- To streamline housing development
- To provide State financial incentives for housing production

**CALIFORNIA 2019 HOUSING PACKAGE***

- To further streamline permitting and approval processes and limit fees for housing production (SB 330)
- To facilitate the development of more accessory dwelling units by removing barriers to approval and construction

**SB 9 (2021)**

- To allow a ministerial approval process for lot splits and duplex construction on lots zoned for single-family use, if the project meets specified requirements.

**SB 10 (2021)**

- To authorizes local governments to rezone parcels for up to 10 units in transit-rich or urban infill sites, as defined, without being subject to CEQA.

*These laws primarily affect zoning and development approvals. Although these laws will not be addressed in the General Plan Update, they have recently been some of the most impactful laws.

# History

## Early San Ramon

The lands of San Ramon are the native home of the Seunen people, a Costanoan and Ohlone speaking tribe. The people interacted and traded with other inland and Bay Area tribes. Living in village communities of 50 to 200 people, the Seunen sustained their way of life by harvesting acorns, seeds, nuts, hunting birds, and large game. Mount Diablo was sacred to the Suenens, as well as other tribes in the greater Bay Area. The Seunen historically called Mount Diabo “Tuyshtak.” The name Mount Diablo (Devil's Thicket in Spanish) originated during a Spanish expedition around 1804.

## Mission Era

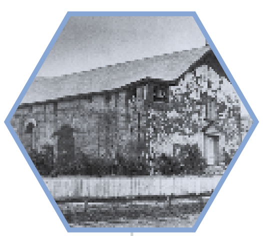
Native American tribes from the eastern valleys began to come to Mission San Jose after it was founded in 1797. By 1806, there were 662 Indians at the Mission, with a peak population of 1,886 in 1831. Mission San Jose became one of the most prosperous of all the 21 missions string due to its excellent water supply and fertile land. The land in the San Ramon valley was primarily used for sheep and cattle grazing for Mission San Jose until the land was given to José María Amador in 1834. Under his ownership, the lands became Rancho San Ramon. Jose Maria Amador's Rancho San Ramon eventually included over 16,000 acres.

**HISTORIC TIMELINE**

*San Ramon Valley and Seunen Tribe*

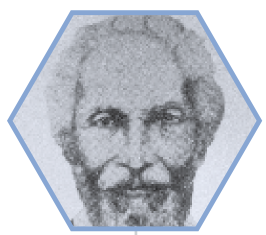
**1760**

*Mission San Jose founded in 1797*



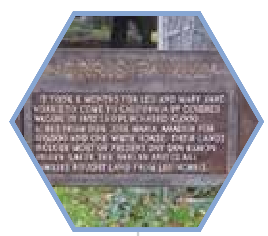
**1797**

*Land given to Jose Maria Amador and named Rancho San Ramon*



**1834**

*Leo and Mary Jane Norris purchase land from Amador*



**1850**

*San Ramon Post Office and General Store*

**1873**

## American Settlers in San Ramon

In the 1850s, Leo and Mary Jane Norris purchased 4,450 acres of land from Amador. During the 1860s, this land became the first village core and a hub of community activity. In 1864, a stage line established by Brown and Company ran from San Ramon through the valley to Oakland. A church was dedicated in 1860, the general store was built in 1863.

## The Twentieth Century

In 1891, the Southern Pacific Railroad extended a route line to San Ramon. Until 1909, San Ramon was the terminus for the Southern Pacific line and featured a large two-story station and turnaround for the trains. San Ramon's development and local economy were reliant on the railroad line.

## Today

The form of San Ramon was largely determined by the 1958 Contra Costa County General Plan, which designated 464 acres of San Ramon as "controlled manufacturing," which later became Bishop Ranch Business Park. Growth in San Ramon was aided by the construction of several major highways, including Interstates 580 and 680. San Ramon transformed from an agriculture-based community to a suburban development. After a long history of settlement and development, San Ramon finally incorporated in 1983.

*San Ramon Terminus Station for the Southern Pacific Railroad*

**1891**

*Bishop Ranch*

**1911**

*Incorporation of San Ramon*

**1983**

*Voter approved Urban Growth Boundary*

**2002**

*Completion of City Center at Bishop Ranch*


**2018**

*Adoption of the CityWalk Master Plan*

**2020**

# Regional Setting

The City of San Ramon is located in southern Contra Costa County in the East Bay region of the San Francisco Bay Area. The City's topography is distinguished by its proximity to Mount Diablo, its foothills, the Las Trampas Regional Wilderness, and Bishop Ranch Regional Preserve. San Ramon is surrounded by unincorporated Alameda County (west), the Town of Danville and unincorporated Contra Costa County (north), unincorporated Contra Costa County (east), and the City of Dublin (south). The City is situated conveniently near two major urban centers- San Francisco, which is 34 miles to the east, and San Jose, which is 38 miles to the south.

Several other cities and towns closely surround San Ramon, including Danville, Dublin, Pleasanton, Livermore, and Walnut Creek. San Ramon is the fourth largest city in Contra Costa County, behind the cities of Richmond, Concord, and Antioch. Within Contra Costa County, the San Francisco Bay Area, and California at large, San Ramon is a vital center for commerce, social activity, recreation, and culture.

# Planning Boundaries

In compliance with State law, every city must consider a Planning Area that consists of land within the city limits and "any land outside its boundaries which, in the planning agency's judgment, bears relation to its planning." The San Ramon Planning Area encompasses 23,499 acres (36.7 square miles). Within the Planning Area are the City limits, Sphere of Influence, and Urban Growth Boundary. The City limits total 12,862 acres (20.1 square miles) and represents the political boundary that defines land that has been incorporated into the City. San Ramon has land use authority over all land within its City limits.

A Sphere of Influence (SOI) is the probable physical boundary and service area of the city, as adopted by a Local Agency Formation Commission (LAFCO). An SOI typically includes both incorporated and unincorporated areas within which a city will have primary responsibility for the provision of public facilities and services. San Ramon's SOI encompasses 19,737 acres (30.8 square miles).

The Urban Growth Boundary (UGB) totals 13,738 acres (21.5 square miles) and encompasses existing urban development or undeveloped areas adjacent to urban development anticipated to be developed over the life of the General Plan. Cities use urban growth boundaries (UGBs) to establish where they intend to encourage and discourage land development through public-infrastructure investments, land-use regulations, land acquisitions, and other actions. Within the UGB, cities typically adopt land use policies that encourage urban development. Outside the UGB, cities typically set aside lands to be used for open space, passive recreation, and/or resource preservation.

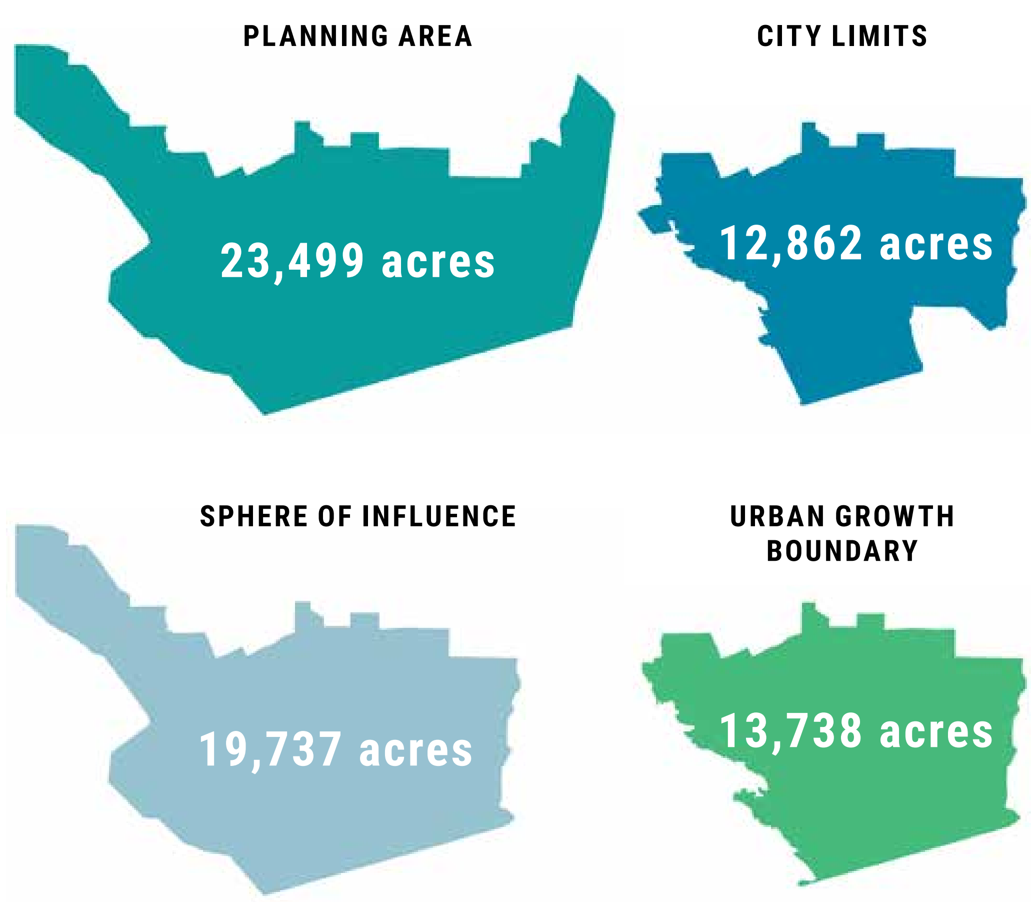
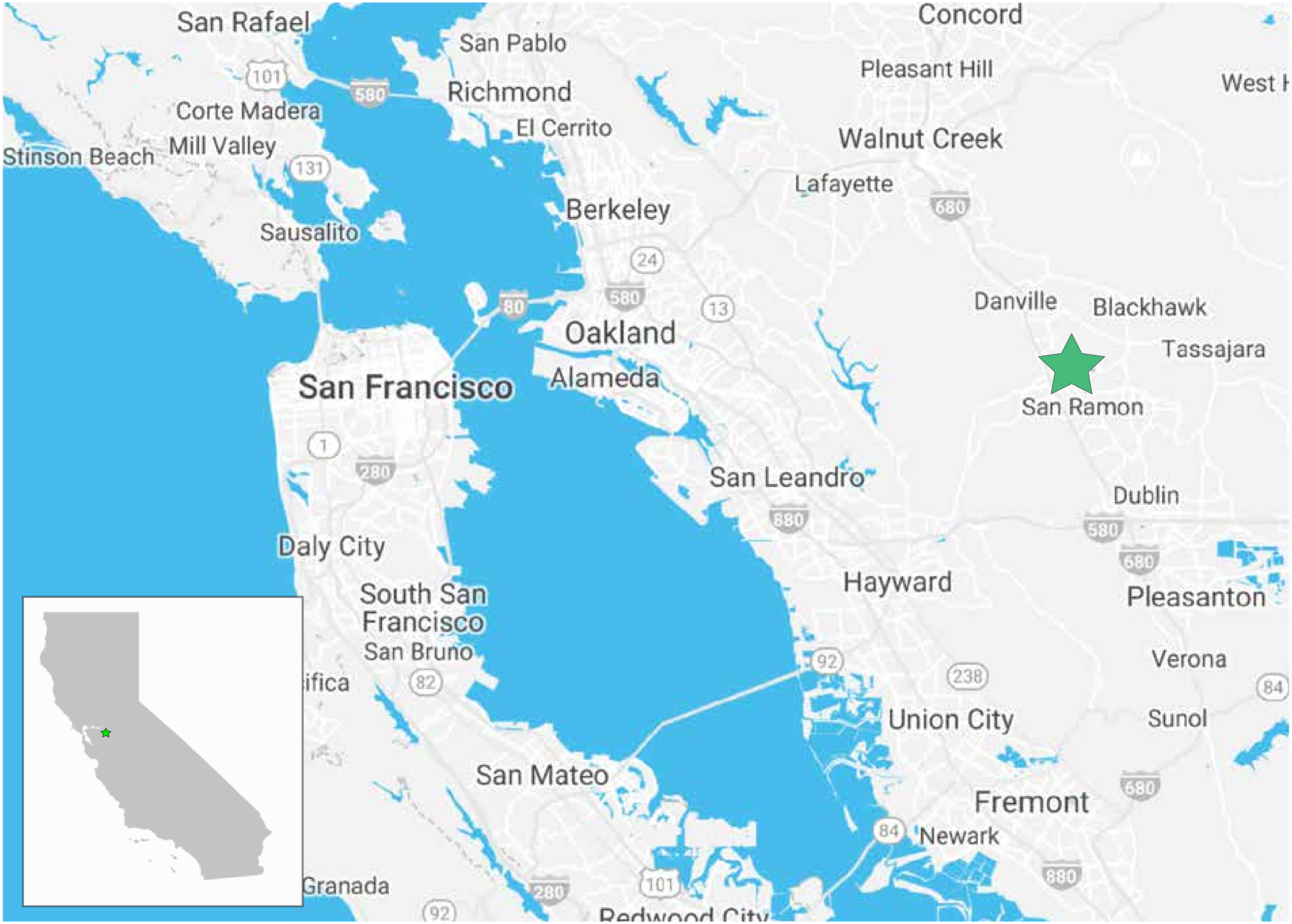


FIGURE 1-3: REGIONAL SETTING



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# 2. DEMOGRAPHICS

*This Demographics section includes an overview of San Ramon's population and provides a look at the distribution of that population by age and race/ethnicity. Information on employment and income can be found in Section 3, Economics. Having an understanding of the makeup of the population will support San Ramon in better gauging the needs of its residents.*

*Over the last few decades, San Ramon has become younger and more diverse. As the community looks to the future, San Ramon must evolve to meet the needs of its residents, both current and future.*

# Population

Between 2010 and 2019, the American Community Survey (ACS) estimates the population in San Ramon grew 5 percent, from 72,404 in 2010 to 75,984 in 2019. Comparatively, Contra Costa's population grew approximately 9 percent during the same time frame (1,052,827 in 2010 and 1,153,526 in 2019). In 2020 the United States Census Bureau reported the population in City rose to 84,605. San Ramon experienced a steady growth between 2010 and 2015, with an average growth rate of 0.95 percent. In 2015, the City saw a peak in population of 76,132. However, in 2016, the population decreased to 75,643. Since this decline, San Ramon's population has slowly risen. See Figure 2-1.

Although the California Department of Finance does not provide population projections at City level, it estimates Contra Costa County's population growing approximately 15 percent from 2019-2060 to a population of 1,351,284. According to the Association of Bay Area Governments (ABAG), San Ramon's population is expected to grow to 84,165 by 2040. See Figure 2-2.

**POPULATION**

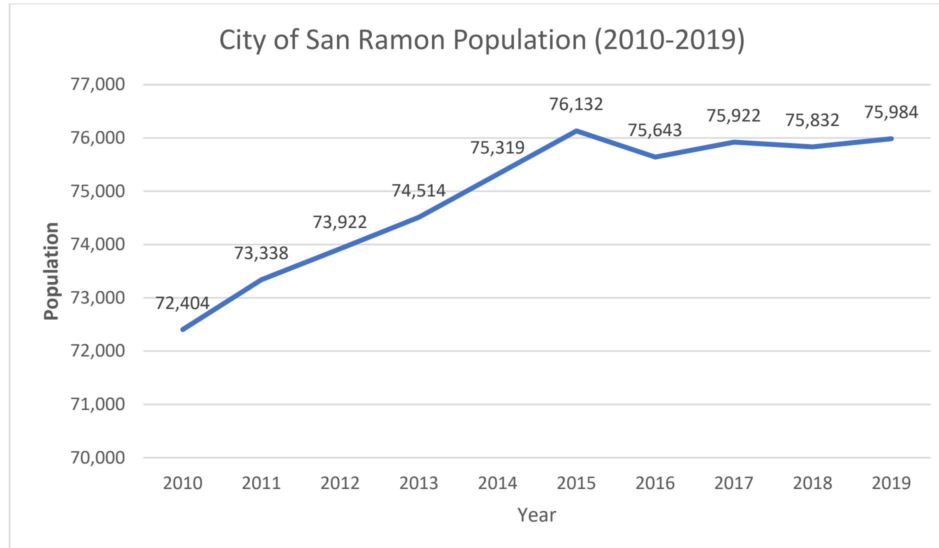
**75,984**

**MEDIAN AGE**

**41.8**

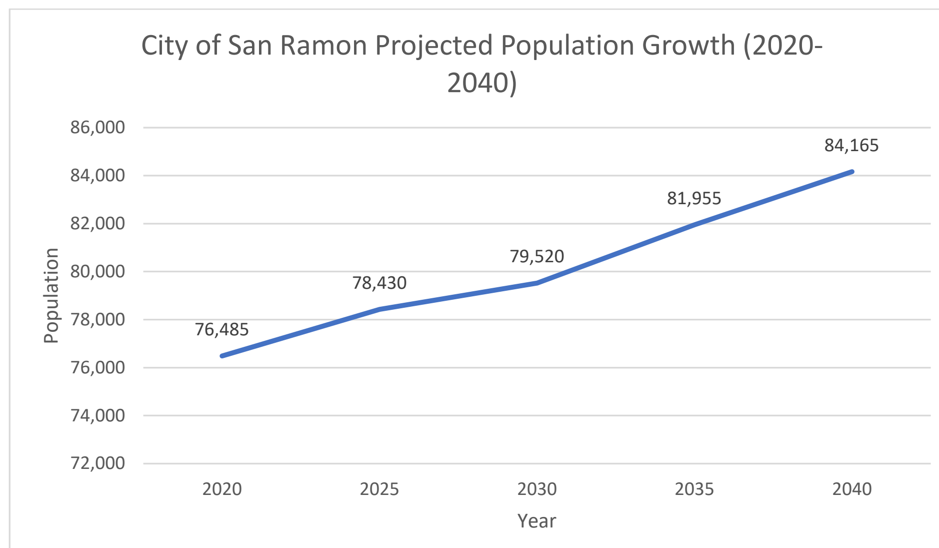
*Source: American Community Survey, 2010-2019, 1-Year Estimates.*

**FIGURE 2-1: SAN RAMON POPULATION**




*Source: American Community Survey, 2010-2019 1-Year Estimates.*

**FIGURE 2-2: SAN RAMON PROJECTED POPULATION GROWTH**




*Source: Association of Bay Area Governments, 2021*

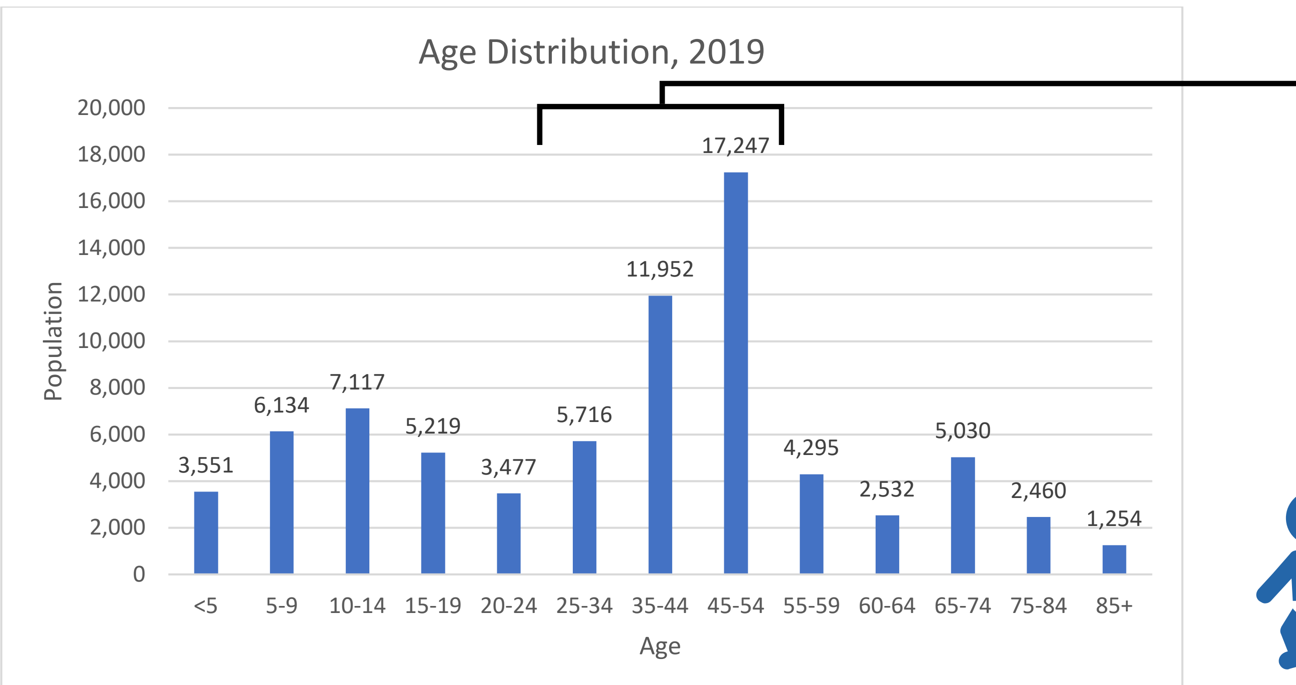
# Age

Based on 2019 American Community Survey, San Ramon has a median age of 41.8 years, up from 38.5 in 2010. Much of this change is due to a decrease in residents ages 20 to 44, and an increase in residents ages 45 to 59 (see Figure 2-3). The median age in Contra Costa County is 40. San Ramon has a high percentage of working age residents between 25 and 54, who make up approximately 46 percent of the total population. Comparatively, Contra Costa Country residents between 25-54 account for 40 percent of the total County population.

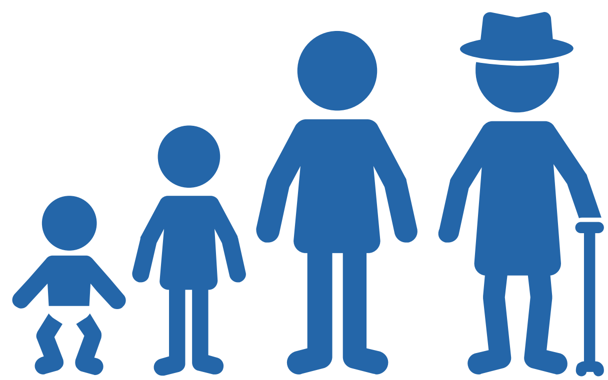
## Note:

At the time this report was prepared, the 2020 U.S. Census Bureau and 2016-2020 American Community Survey 5-year Estimates were not available. It is important to note that since the publication of this Report, the 2020 U.S. Census Bureau population numbers were released. In 2020, the population for San Ramon was **84,605.**

**FIGURE 2-3: SAN RAMON AGE DISTRIBUTION**




**45.9% OF TOTAL POPULATION**

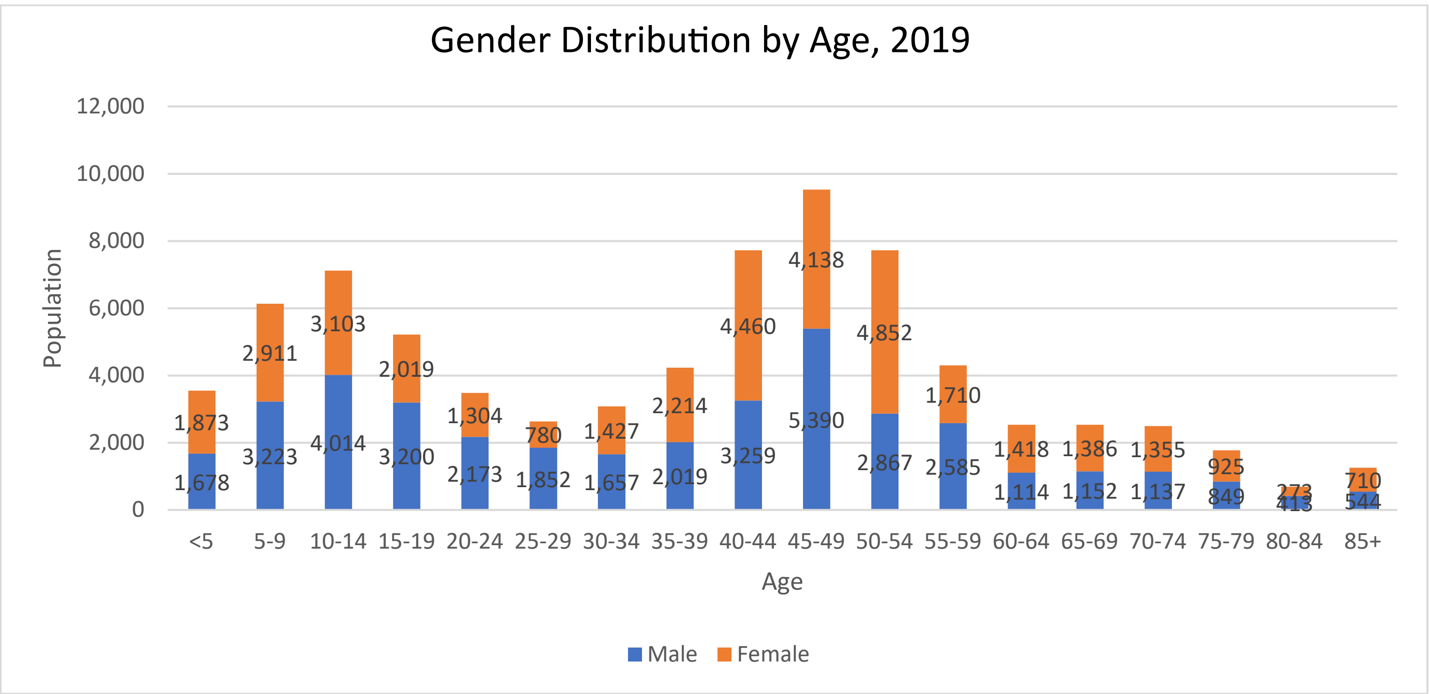


*Source: American Community Survey, 2019.*

# Gender Distribution

At 51.5 percent, a slight majority of the population in San Ramon is male. There are about 39,126 residents who identify as male compared to 36,858 who identify as female. The female population percentage is higher for Contra Costa County as a whole, at 51.2 percent, making the proportion of males lower in the county (48.8 percent). The distribution of males to females across the age spectrum is generally about 50/50. However, there are more females in the 40 to 44 age group (58 percent female to 42 percent male) and 50 to 54 age group (63 percent female to 37 percent male). Conversely, there are more males in the 25 to 29 age group (30 percent female to 70 percent male) and the 35-49 age group (43 percent female to 57 percent male). The distribution of gender by age group is illustrated in Figure 2-4.

**FIGURE 2-4: SAN RAMON GENDER DISTRIBUTION**

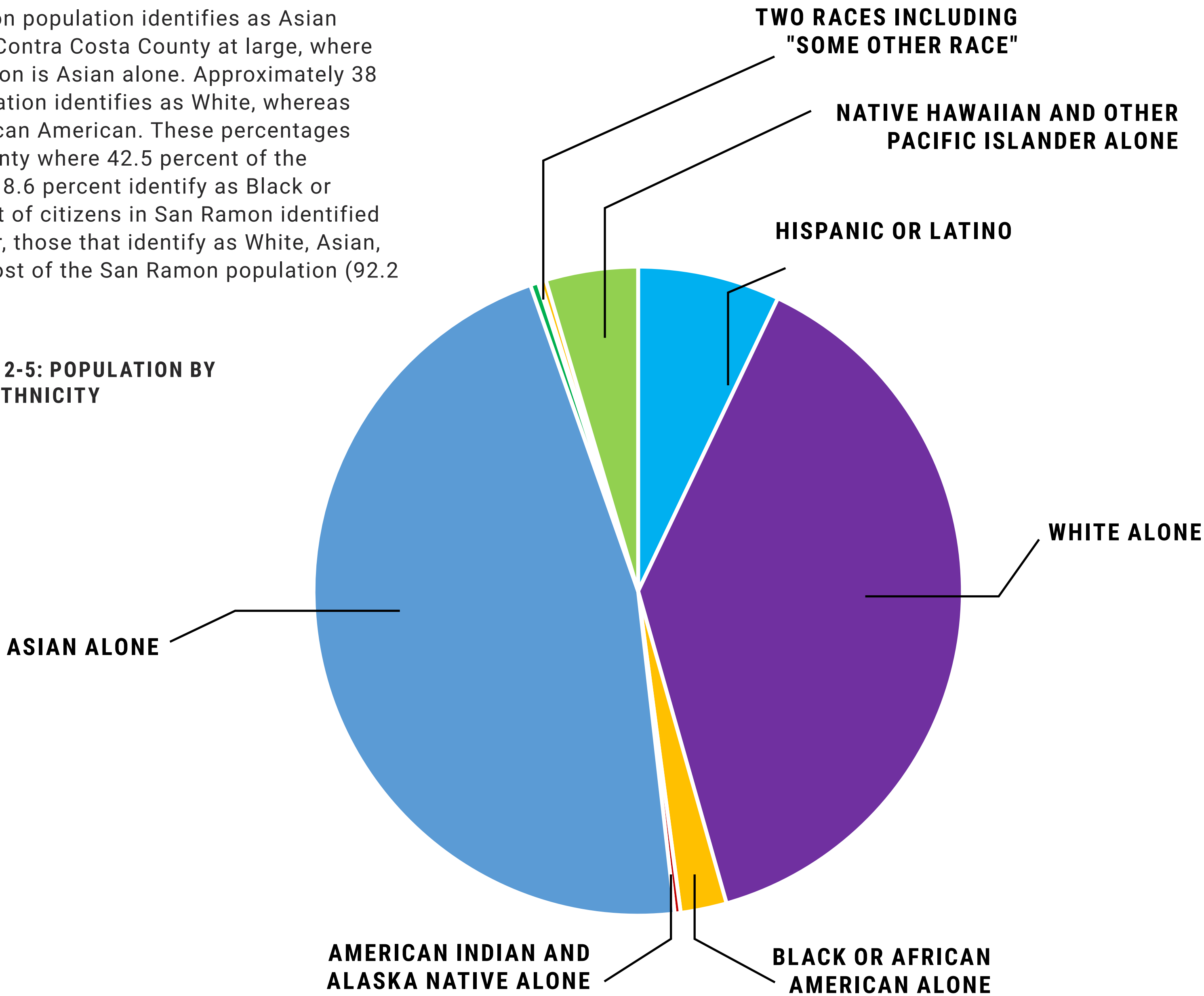



*Source: American Community Survey, 2019.*

# Race/Ethnicity

Over 46 percent of the San Ramon population identifies as Asian alone. This is much higher than Contra Costa County at large, where only 17.6 percent of the population is Asian alone. Approximately 38 percent of the San Ramon population identifies as White, whereas only 2.3 identify as Black or African American. These percentages are lower than Contra Costa County where 42.5 percent of the population identify as White and 8.6 percent identify as Black or African American. Over 7 percent of citizens in San Ramon identified as Hispanic or Latino. Altogether, those that identify as White, Asian, and Hispanic/Latino make up most of the San Ramon population (92.2 percent). See Figure 2-5.

**FIGURE 2-5: POPULATION BY RACE/ETHNICITY**




*Source: American Community Survey, 2019 5-Year Estimates*

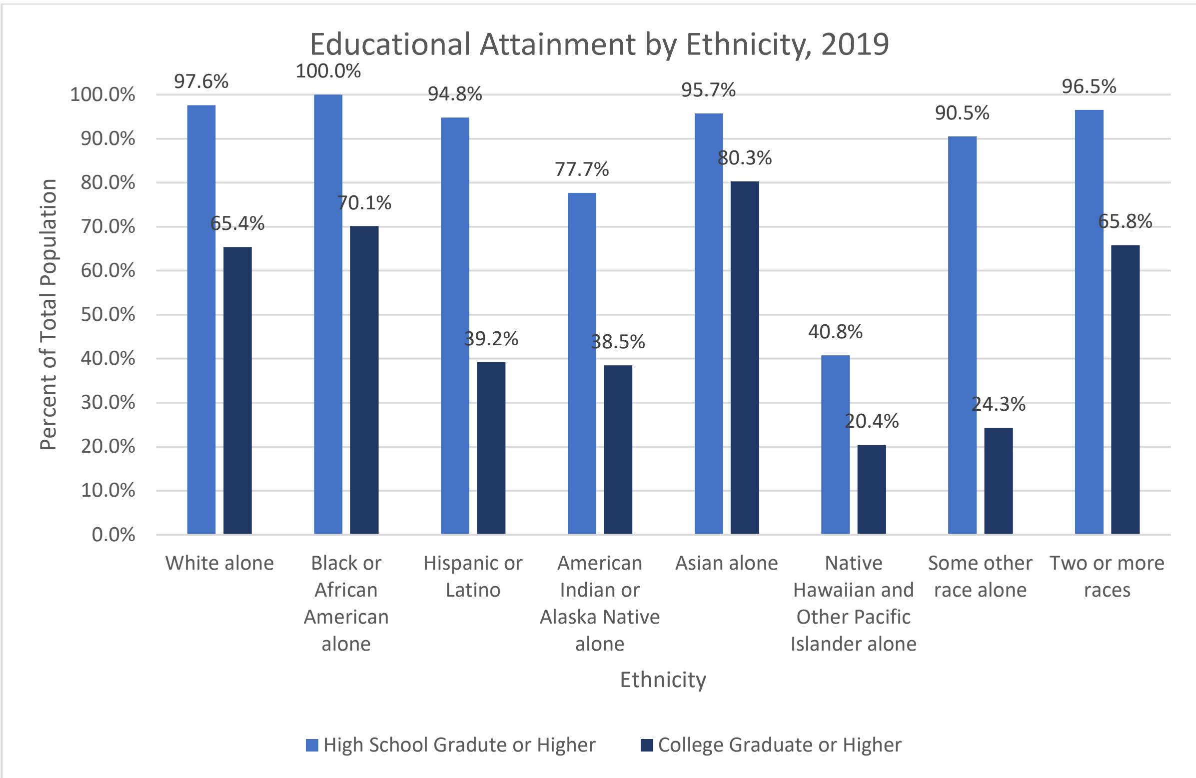
# Educational Attainment

Educational attainment refers to the highest level of education that an individual has completed. Higher education has long been an indicator of economic vitality for California communities. For cities and counties, more college graduates mean greater economic mobility, more tax revenue, and less demand for social services. The educational attainment level in San Ramon is high. Over 70 percent of the population 25 years and older have a bachelor's degree or higher. Comparatively, Contra Costa County is 43 percent and the statewide average is 34 percent.

Overall, Asian adults are the most educated racial/ethnic group in San Ramon, with over 80 percent holding at least a bachelor's degree, followed by Black/African American adults (70.1 percent) and White adults (65.4 percent). In contrast, approximately 39 percent of Hispanic/Latino adults and Native American/Alaska Native adults have a bachelor's degree. Native Hawaiians and other Pacific Islanders have a comparatively lower level of educational attainment than other ethnicities in San Ramon with 20 percent having graduated college. See Figure 2 -6.

San Ramon's high educational attainment is a result of its location in the Bay Area. Many of California's most highly educated cities and counties are in the Bay Area, which has one of the largest concentrations of technology-based companies in the country. The Bay Area's need and reliance on highly-skilled and educated workers helps explain high education attainment in San Ramon.

**FIGURE 2-6: SAN RAMON EDUCATION ATTAINMENT**

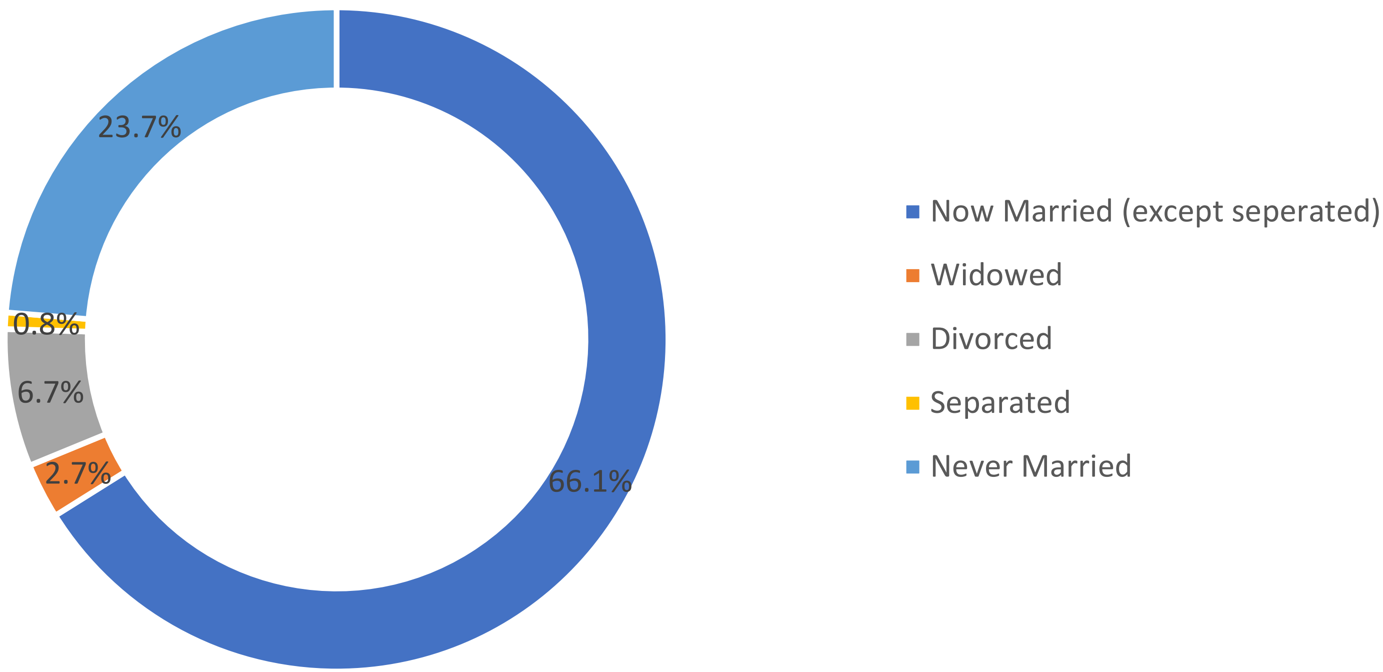



*Source: American Community Survey, 2019 5-Year Estimates.*

# Marital Status

The City of San Ramon has a higher percentage of married couples and a lower percentage of divorced individuals than the rest of Contra Costa County. In San Ramon, 66.1 percent of the population 15 years and older are married, 2.7 percent are widowed, 6.7 percent are divorced, 0.8 percent are separated, and 23.7 percent have never married (see Figure 2-7). In Contra Costa County, 52.5 percent of the population 15 years and older are married, 4.6 percent are widowed, 9.4 percent are divorced, 1.4 percent are separated, and 32.1 percent have never married.

**FIGURE 2-7: SAN RAMON MARITAL STATUS**

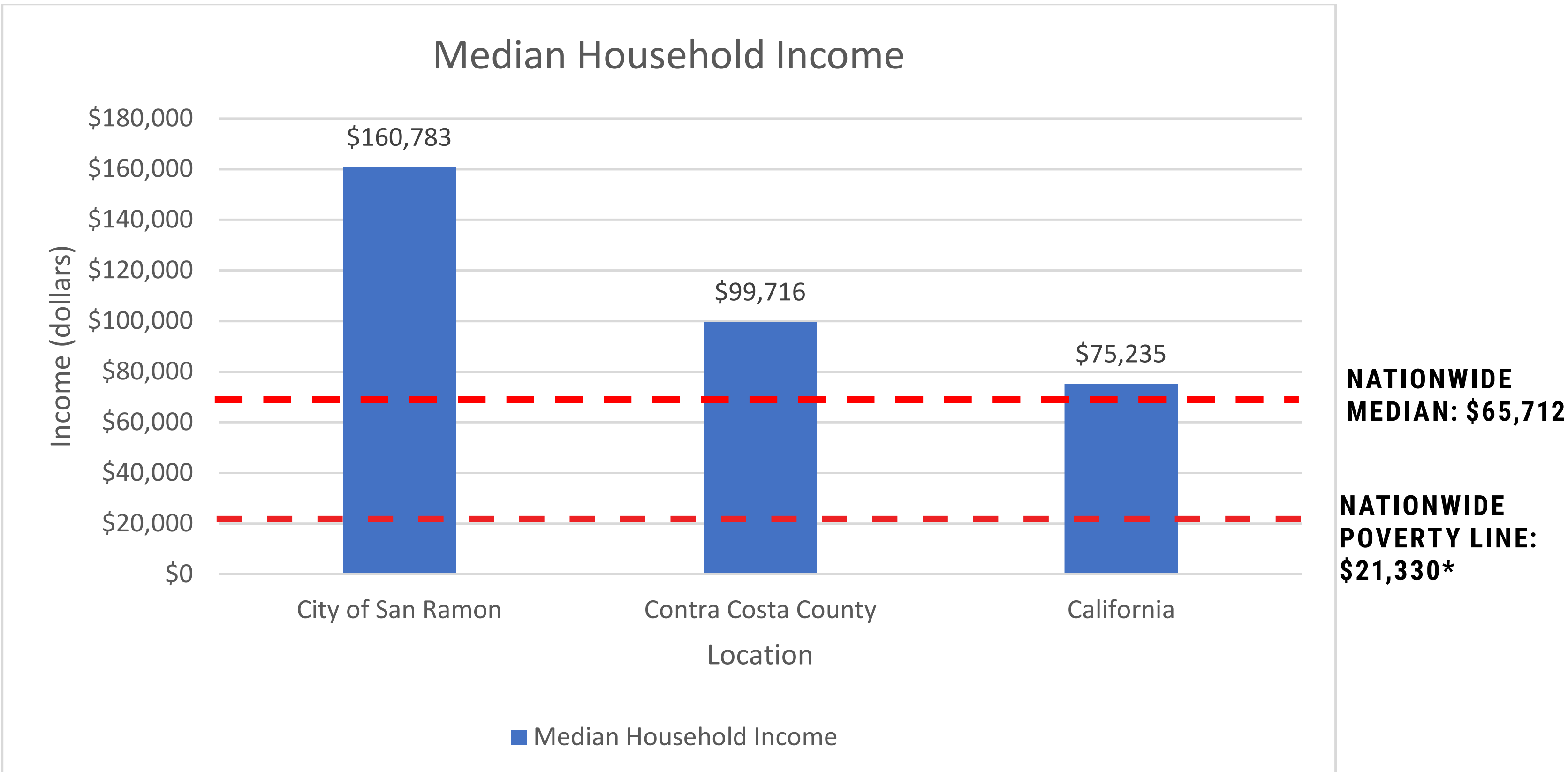



*Source: American Community Survey, 2019 5-Year Estimates.*

# Household Income

San Ramon has a high median household income level of $160,763, with only 3.7 percent of the population living below the poverty line. As of 2019, the per capita income in San Ramon was $63,782. In comparison, the median household income in Contra Costa County is $99,716. See Figure 2-8.

**FIGURE 2-8: SAN RAMON MEDIAN HOUSEHOLD INCOME**




*Source: American Community Survey, 2019 5-Year Estimates.*
**Nationwide poverty line based on average household size of three persons per household.*


FOREST HOME FARMS


Tactics
Lv2
Deflection
Decoy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# 3. ECONOMICS

*The retail commercial sector over the past decade has continued to transform towards less of a focus on traditional brick and mortar establishments, and an increase in e-commerce and experiential retail. As the General Plan looks toward the next 20 years, it is vital for San Ramon to examine revenue generating uses that contribute to the overall fiscal health of the community and identify where the City is lacking in capturing untapped markets. The first step in identifying issues, opportunities, and potential new exploratory markets is through the preparation of a detailed Market Conditions and Demand Projections for Retail, Office, and Industrial Development Analysis. This Analysis is provided in Appendix A of this Existing Conditions and Trends Workbook. The Analysis provides local and regional context for the current market conditions and demand projections for retail, office, and industrial development. The Analysis includes an in-depth review of potential future retail development opportunities in San Ramon. These opportunities are described through a detailed retail demand and supply modeling process, and in terms of the potential effects of a mix of countervailing market factors, include the following:*

- *Global trends within the retail industry (negative influence)*
- *San Ramon's substantial existing "leakage" of resident retail demand (potentially a positive factor)*
- *Modest projected population growth (generally a constraining factor)*

*The Market Conditions and Demand Projections for Retail, Office, and Industrial Development Analysis is the first in a series of detailed reports that will outline market conditions and trends. Upcoming reports will also cover hotel and housing demand projections, as well as a pro forma financial analysis as an additional means of screening development feasibility (and identifying land use policies that can maximize the City's development potential).*


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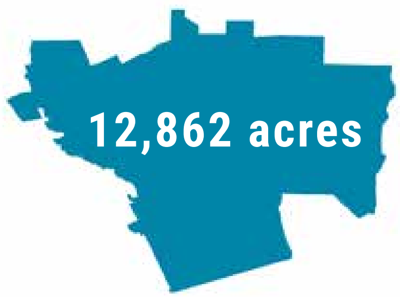
# 4. LAND USE AND COMMUNITY DESIGN

*Land use policies, plans, and documents guide development and shape the urban fabric of the San Ramon Planning Area. This section provides a snapshot of local land use patterns in San Ramon and examines existing and planned land uses. This section also summarizes regional plans and discusses how these plans influence land uses within the City of San Ramon.*

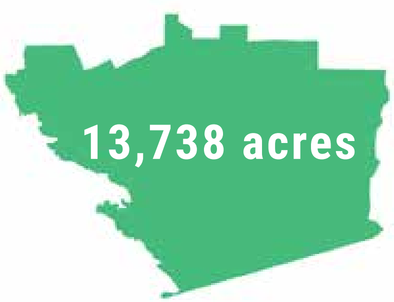
# Notable Boundaries

The existing General Plan uses several terms to describe the City and associated planning boundaries (Figure 4-1):

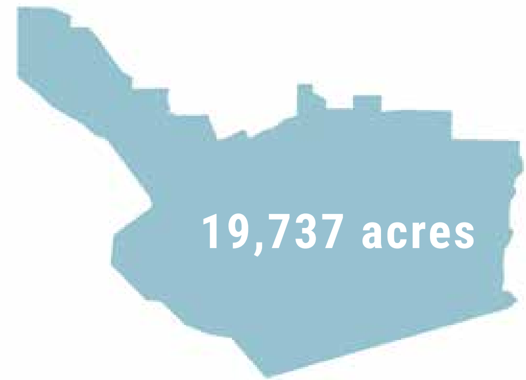
- **City Limits:** The political boundary that defines land that has been incorporated into a city. San Ramon has land use authority over all land within its City limits, which spans over 12,862 acres.




- **Urban Growth Boundary:** The Urban Growth Boundary (UGB) is a direct response to Measure G (1999) put in place as an effort to limit the extent of urban development and services in San Ramon and preserve open space. According to the 2035 General Plan, the UGB was not changed as a result of the 2010 voter review and may be subject to additional review again in 2022 pursuant to Policy 4.6-I-3, should future revisions be proposed. The UGB spans a total of 13,738 acres.

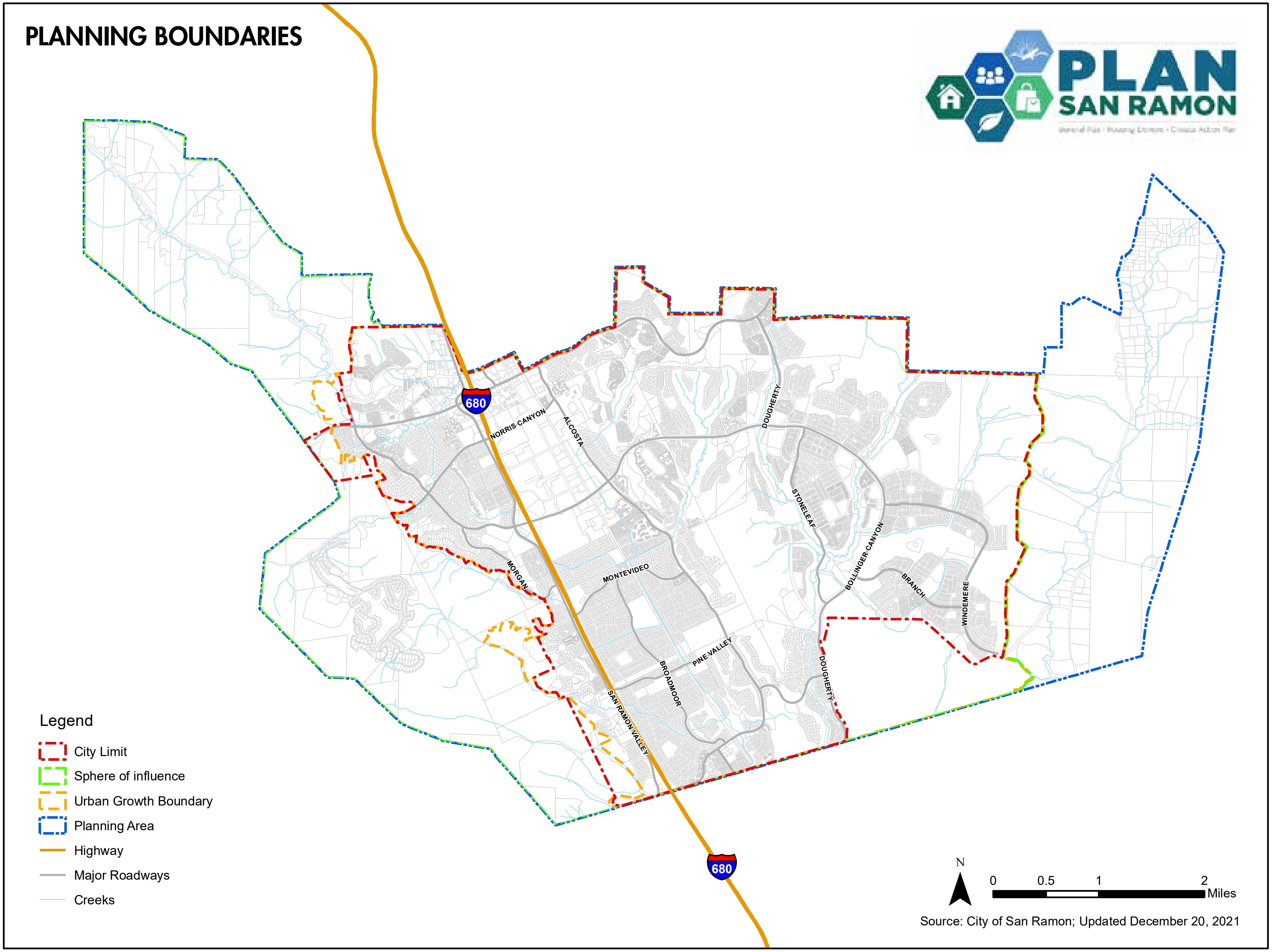



- **Sphere of Influence (SOI):** The Local Agency Formation Commission (LAFCo) establishes the Sphere of Influence (SOI), which defines the probable physical boundary and service area of a local agency. An SOI typically includes both incorporated and unincorporated areas within which the City will have primary responsibility for the provision of public facilities and services. San Ramon's SOI totals 19,737 acres.




- **Planning Area:** A general plan, pursuant to State law, must address all areas within the jurisdiction's Planning Area. The Planning Area encompasses all incorporated and unincorporated territory that bears a physical relationship to the long-term planning of the City. The Planning Area of San Ramon encompasses the City limits, the Sphere of Influence, and the Urban Growth Boundary at 23,499 acres.

**FIGURE 4-1: BOUNDARIES**



# Existing Land Use

An understanding of the type and distribution of existing land uses and development in the City is critical to the preparation of any Land Use Diagram. Although the existing land use of a property does not carry any regulatory significance and may or may not be consistent with the current regulating General Plan land use designation or zoning for the property, existing land use information can assist in evaluating if past General Plan policies were effective in directing new growth and if development is consistent with the General Plan.

Table 4-1 shows that over 35 percent of the area within the City limits is comprised of residential development (single family and multifamily combined). Single family residential makes up just under 30 percent, while multifamily makes up nearly 6 percent. Office use makes up 4 percent of the area. Public/Institutional, which includes churches, schools, government-owned property with or without buildings (including government-owned open space), as well as municipally-owned property, makes up 39 percent of the area. A large portion of the public and quasi-public use is concentrated in outer portions of the City limits where there are large amounts of open space, which is government- owned property.

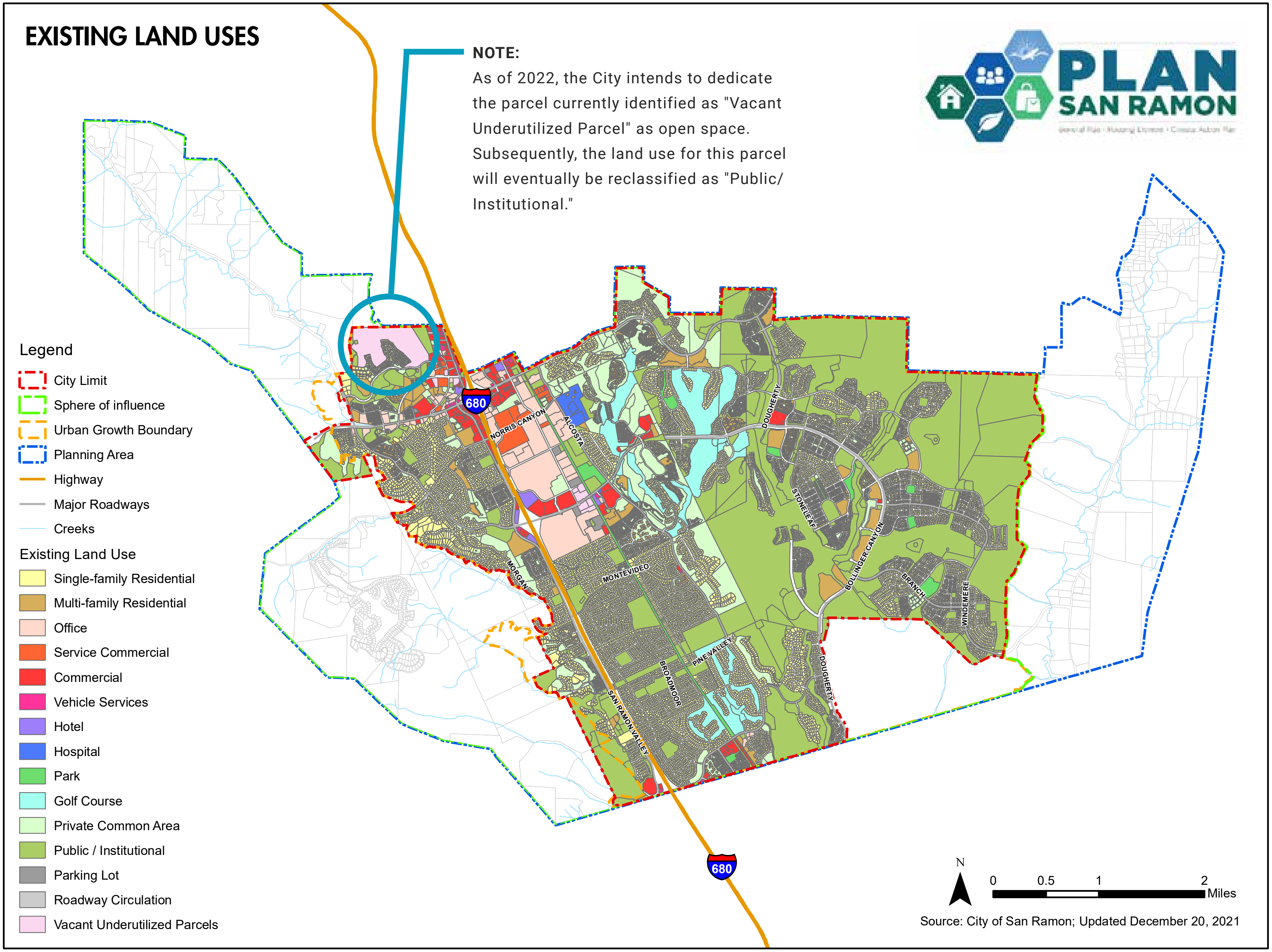
Recreation and Open Space, which includes public parks as well as golf courses, makes up 6 percent of the area. A majority of this use is concentrated on the eastern side of I-680. Commercial, which consists of mostly shopping centers as well as service uses, makes up three percent of uses within the City limits.

Table 4-1 shows a breakdown of the existing land uses within San Ramon City limits.

**TABLE 4-1: EXISTING LAND USES BY ACRES**

| Existing Land Use | Acres | Percent |
|---|---|---|
| Single Family Residential | 3331.78 | 29.96% |
| Multifamily Residential | 656.81 | 5.91% |
| Office | 466.80 | 4.20% |
| Service Commercial | 92.63 | 0.83% |
| Commercial | 244.42 | 2.20% |
| Vehicle Services | 15.76 | 0.14% |
| Hotel | 27.53 | 0.25% |
| Hospital | 43.83 | 0.39% |
| Park | 121.18 | 1.09% |
| Golf Course | 499.26 | 4.49% |
| Private Common Area | 1106.95 | 9.95% |
| Public/Institutional | 4318.34 | 38.83% |
| Roadway/Circulation | 44.73 | 0.40% |
| Vacant Underutilized Parcels | 151.68 | 1.36% |
| **Total** | **11121.70** | **100.00%** |

FIGURE 4-2: EXISTING LAND USES



# Existing (2035) General Plan Land Uses

The City of San Ramon General Plan 2035 is the existing and governing General Plan in San Ramon. It was adopted in April 2015. The General Plan guides how land in the City may be developed and used by designating each parcel by a particular use, as well as by establishing broad development policies. Land use designations identify the types of development allowed (e.g., residential, commercial, industrial), the density for residential uses (how many units are permitted per acre), and the intensity for commercial and industrial designations (the maximum allowed building bulk and lot coverage) that is permitted on each parcel.

Figure 4-3 and Table 4-2 provide a breakdown of existing General Plan land use designations within the City limits of San Ramon.

**TABLE 4-2: EXISTING GENERAL PLAN LAND USES BY ACRES**

| Land Use Designation | Acres | Percent |
|---|---|---|
| Rural Conservation | 1765.86 | 7.89% |
| Hillside Residential | 632.41 | 2.83% |
| Single Family-Low Density | 302.38 | 1.35% |
| Single Family-Low Medium Density | 3134.66 | 14.01% |
| Single Family-Medium Density | 1200.39 | 5.37% |
| Multifamily-High Density | 520.71 | 2.33% |
| Multifamily-Very High Density | 101.04 | 0.45% |
| Office | 256.87 | 1.15% |
| Retail Shopping | 87.54 | 0.39% |
| Thoroughfare Commercial | 11.56 | 0.05% |
| Mixed Use-City Center | 147.85 | 0.66% |
| Mixed Use-Commercial | 58.55 | 0.26% |
| Mixed Use | 467.83 | 2.09% |
| Commercial Recreation | 14.33 | 0.06% |
| Golf Course | 306.00 | 1.37% |
| Public and Semipublic | 482.92 | 2.16% |
| Parks | 1913.90 | 8.56% |
| Open Space | 10962.90 | 49.01% |
| **Total** | **22367.70** | **100.00%** |

There are 18 land use designations in San Ramon's existing 2035 General Plan. The 18 land use designations are:

### Rural Conservation

This designation provides for rural single-family residential development of up to 1 unit per 5 acres of buildable land in unserviced areas with clustered development encouraged to permit suitable development sites of less than 20 percent slope and to achieve an open space preservation target of 90 percent. Density increases of up to 1 unit per 2.5 acres of buildable land may be permitted with mandatory clustered development and open space dedication of over 80 percent of the gross area

***Density/Intensity***

- 0.20 to 0.40 dwelling units per acre

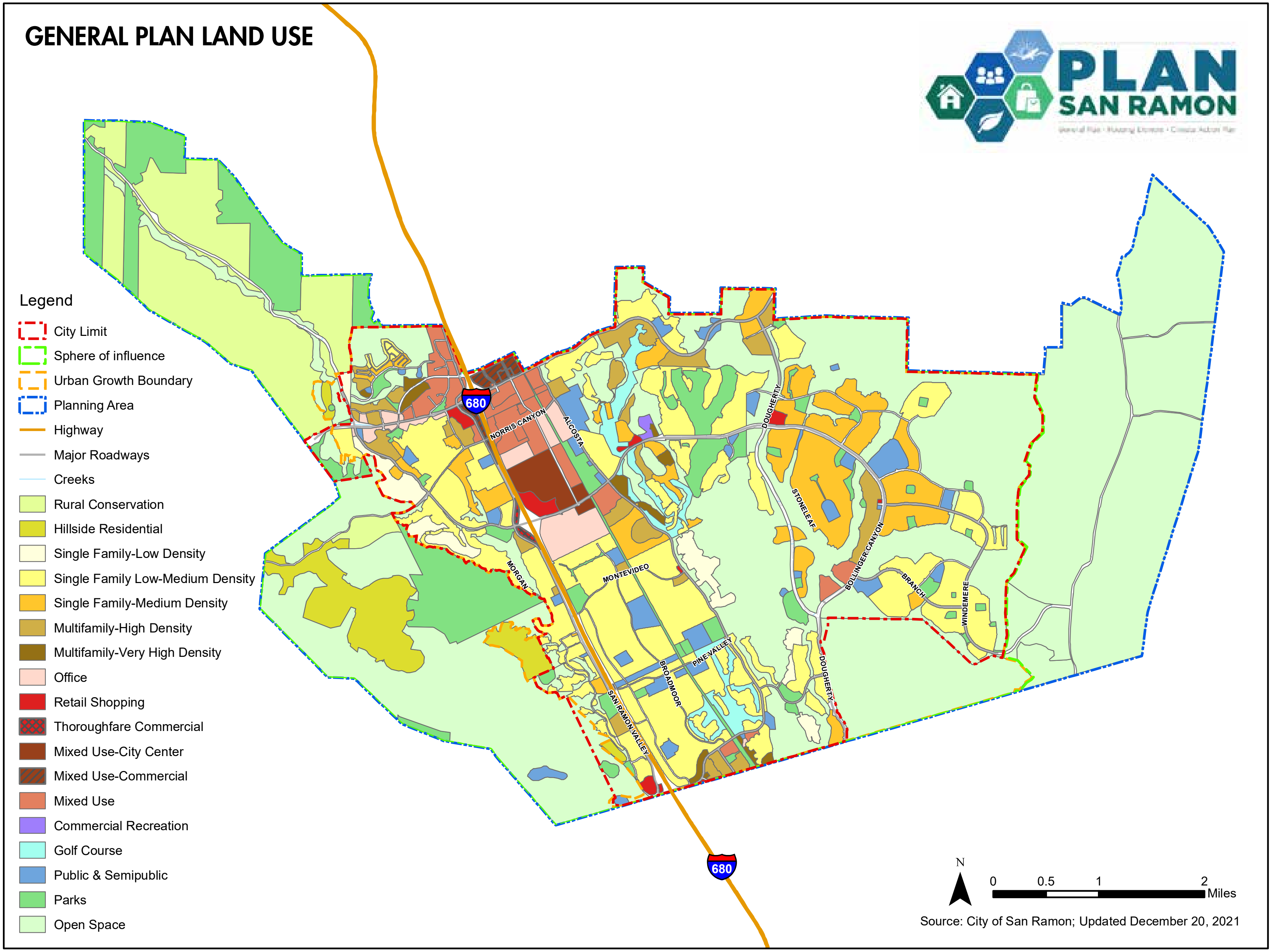
### Hillside Residential

This designation provides for a base density of up to 1 unit per 5 acres of buildable land for single-family residential development in serviced areas. Developments of four or more units must use clustered development techniques on suitable development sites with slopes of less than 20 percent. Density increases of up to 2 units per acre of buildable land in utility-served areas may be permitted to achieve an open space preservation target of 70 percent.

***Density/Intensity***

- 0.20 to 2.00 dwelling units per acre

FIGURE 4-3: EXISTING GENERAL PLAN LAND USES



## What is FAR?

FAR is an indicator of how much building space can be constructed on a given site. FAR provides for overall development intensity, but not the form or character of the building.

**FAR = RATIO OF FLOOR AREA TO LOT AREA**

### Single Family-Low Density

This designation allows for single family residential development at densities of between 0.2 - 3 units per acre. Typical lot sizes range from 10,000 to 15,000 square feet. This designation reflects existing low-density neighborhoods, such as Twin Creeks Hills and Royal Ridge.

***Density/Intensity***

- 0.20 to 3.00 dwelling units per acre

### Single Family-Low Medium Density

This designation allows for single family residential development at densities of between 3 - 6 units per acre with a maximum lot size of 10,000 square feet. The Oaks in the Westside is one example of this designation.

***Density/Intensity***

- 3.00 to 6.00 dwelling units per acre

### Single Family-Medium Density

This designation allows for single family residential development at densities of between 6 - 14 units per acre with typical lot sizes of approximately 3,500 square feet and including detached units, zero lot line units, garden patio homes, and townhomes.

***Density/Intensity***

- 6.00 to 14.00 dwelling units per acre

### Multifamily-High Density

This designation allows for multiple family residential development at densities of between 14-30 units per acre. Such development should reflect high quality design with integrated open space and recreational and/or cultural amenities, and opportunities for workforce housing. Structure parking would be necessary at the higher end of the range.

***Density/Intensity***

- 14.00 to 30.00 dwelling units per acre

### Multifamily-Very High Density

This designation provides for the highest density multiple-family residential development at densities of between 30-50 units per acre. Such development units should reflect high quality design with integrated open space and recreational and/or cultural amenities, and opportunities for workforce housing. Structure parking would be necessary.

***Density/Intensity***

- 30.00 to 50.00 dwelling units per acre

### Office

This designation allows for business, professional, and public offices at intensities of up to 0.45 FAR, including retail uses and restaurants in mixed-use buildings and supporting commercial services at appropriate locations.

***Density/Intensity***

- FAR 0.45

### Retail Shopping

This designation includes sites for retail shopping and services at intensities of up to 0.35 FAR, including restaurants; commercial recreation facilities; and personal, business, and financial services.

***Density/Intensity***

- FAR 0.35

### Thoroughfare Commercial

This designation allows for travel-oriented commercial uses at intensities of up to 0.50 FAR, including hotels, motels, service stations, restaurants, etc., located on major arterial streets and intersections.

***Density/Intensity***

- FAR 0.5

### Mixed Use-City Center

This designation applies to City Center Bishop Ranch and the adjacent BR-2600 property in the core area of San Ramon. It is intended to foster a vibrant, integrated, and cohesive mix of civic, retail, office, residential, and open space uses and promote a walkable, bikable environment at the physical center of the City. Development intensities of up to 0.70 FAR are permitted, with additional FAR, up to a maximum of 1.35, allowed for projects that include such elements as affordable housing; significant public benefits and/or amenities such as public art and plazas; public facilities; and/or a transit facility nearby or in close proximity. The allowable residential density range is 22 dwelling units per acre up to 50 dwelling units per acre.

***Density/Intensity***

- FAR 0.70

### Mixed Use-Commercial

This designation allows for an integrated mix of non-residential uses—retail, service, office— at intensities of up to 0.70 FAR. This designation applies in locations where residential development is not appropriate, such as areas immediately adjacent to I 680. Development in Mixed Use-Commercial areas should reflect high-quality design with integrated open space and/or cultural amenities. Structured parking may be necessary.

***Density/Intensity***

- FAR 0.70

### Mixed Use

This designation allows for an integrated mix of residential and non-residential uses—retail, service, office—at intensities of up to 0.70 FAR with residential densities in the range of 14 to 30 dwelling units per acre. Such development should reflect high-quality design with integrated open space and recreational and/or cultural amenities, and opportunities for workforce housing. Structure parking may be necessary. Additional FAR may be allowed for projects that provide more than the 25 percent of total units as workforce housing.

***Density/Intensity***

- FAR 0.70

### Commercial Recreation

This designation allows for sports and fitness clubs, horse stables, and amusement parks at intensities of up to 0.35 FAR.

***Density/Intensity***

- FAR 0.35

### Golf Course

This designation allows for golf courses and accessory facilities and uses at intensities of up to 0.10 FAR.

***Density/Intensity***

- FAR 0.10

### Public and Semipublic

This designation allows for schools, hospitals and related medical offices, religious institutions, utilities, and quasi-public uses at intensities of up to 0.35 FAR.

***Density/Intensity***

- FAR 0.35

### Parks

This designation allows for public and private recreation sites and facilities at intensities of up to 0.10 FAR.

***Density/Intensity***

- FAR 0.10

### Open Space

This designation allows for land protected from development and primarily held in its natural vegetative state, with some land privately owned and used for agricultural purposes. San Ramon General Plan 2035 4-24 The maximum FAR for non-residential structures is 0.10, and the residential density is limited to 1 unit per 20 acres, which may be reduced with Clustered Development, and creek and ridgeline protection standards may apply.

***Density/Intensity***

- FAR 0.10

# Existing Zoning

While the General Plan provides general guidance on the location, type, and density of new growth and development projects over the long term, the Zoning Ordinance provides detailed development regulations and use standards for each parcel of land. The Zoning Ordinance includes a set of zoning districts that specify uses that are permitted, conditionally permitted, and prohibited within each district. Figure 4-4 is the Zoning Map for San Ramon along with a breakdown of the zoning districts by acres (excluding specific plan areas) as shown in Table 4-3.

San Ramon zoning districts are broken up into four categories, organized as follows:

**Residential**

Zoning districts based on differing densities and appropriate uses, varying from rural and hillside residential with single-family homes to high-density and multiple family-very high density with high numbers of dwelling units per acre.

**Mixed Use**

Zoning districts appropriate for an integrated mix of land uses including residential, retail, office, public, and open space.

**Commercial, Office, and Industrial**

Zoning districts appropriate for office buildings, retail uses, commercial uses, services, and warehousing and manufacturing, organized in zones based on relative suitability in the City.

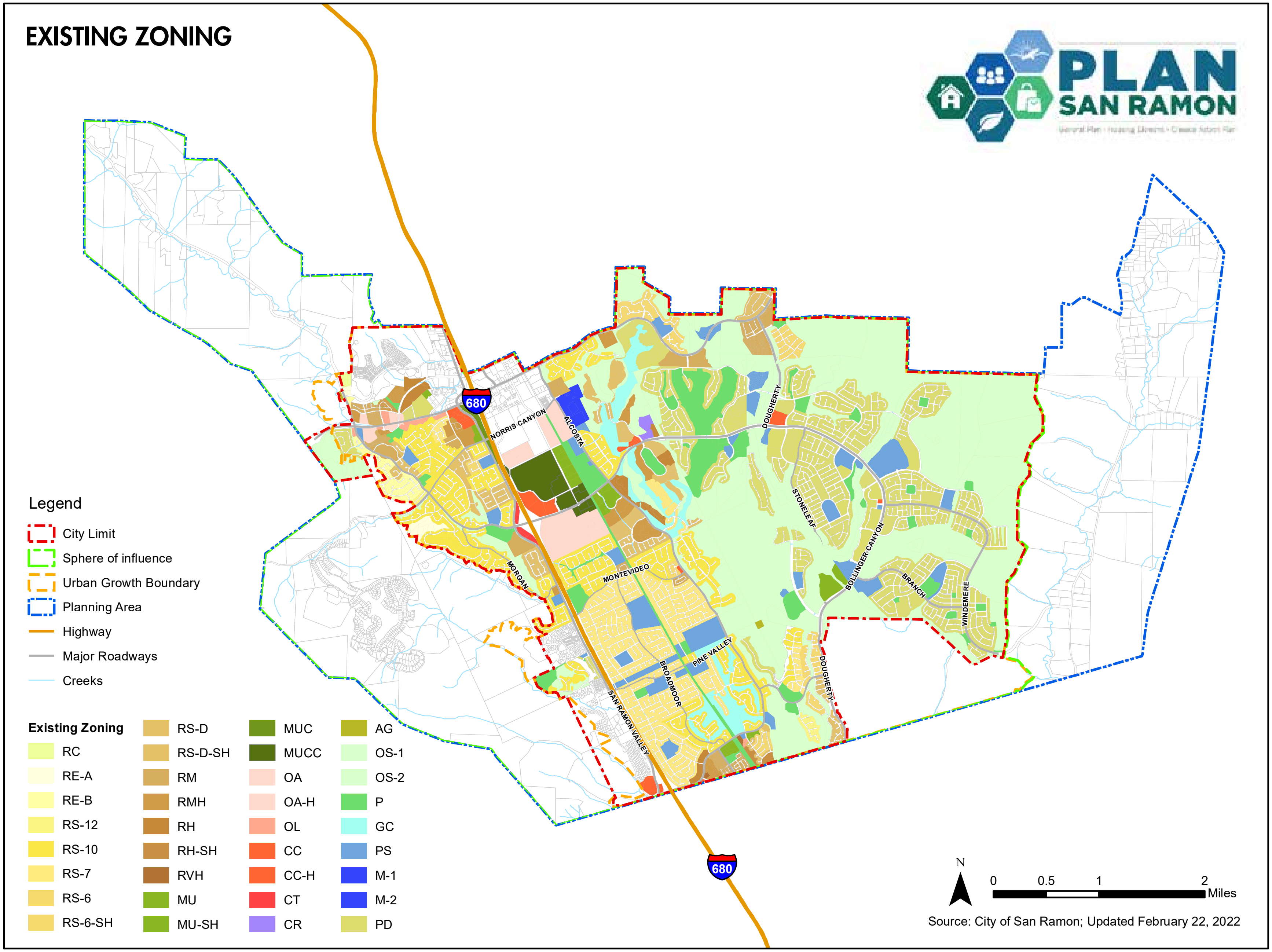
**Special Purpose**

Zoning districts for zones that do not fit residential, mixed use, or commercial, office, and industrial zoning categories. Special purpose districts include agriculture, open space, parks and recreation, golf courses, public and semi-public, medical centers, health facilities, and planned development zones.

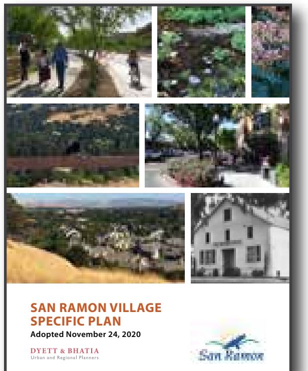
**TABLE 4-3: EXISTING ZONING BY ACRES**

| Zoning Category | Zoning District | Acres | Percent |
|---|---|---|---|
| Residential | RC (Rural Conservation) | 8.44 | 0.08% |
| | HR (Hillside Residential) | - | - |
| | RE (Residential Estate) | 97.78 | 0.97% |
| | RS (Single-Family Residential) | 2106.82 | 20.89% |
| | RM (Medium-Density Residential) | 229.17 | 2.27% |
| | RMH (Medium-High Density Residential) | 181.52 | 1.80% |
| | RH (High-Density Residential) | 116.08 | 1.15% |
| | RVH (Multiple Family-Very High Density) | 3.58 | 0.04% |
| | Subtotal | 2743.39 | 27.20% |
| Mixed Use | MU (Mixed Use) | 113.54 | 1.13% |
| | CCMU (City Center Mixed Use) | 154.09 | 1.53% |
| | MU-C (Mixed Use-Commercial) | 14.79 | 0.15% |
| | Subtotal | 282.43 | 2.80% |
| Commercial, Office, and Industrial | OA (Administrative Office) | 233.32 | 2.31% |
| | OL (Limited Office) | 20.85 | 0.21% |
| | CC (Community Commercial) | 85.70 | 0.85% |
| | CT (Thoroughfare Commercial) | 11.57 | 0.11% |
| | CS (Service Commercial) | - | - |
| | CR (Commercial Recreation) | 14.41 | 0.14% |
| | MW (Manufacturing/Warehousing) | - | - |
| | Subtotal | 365.85 | 3.63% |
| Special Purpose | AG (Agriculture) | 4.81 | 0.05% |
| | OS-1 (Open Space) | 3732.02 | 37.00% |
| | OS-2 (Open Space) | 84.58 | 0.84% |
| | P (Parks and Recreation) | 576.89 | 5.72% |
| | GC (Golf Course) | 303.21 | 3.01% |
| | PS (Public and Semi-Public) | 471.67 | 4.68% |
| | M-1 (Medical Center) | 43.19 | 0.43% |
| | M-2 (Health Facility) | 1.42 | 0.01% |
| | PD (Planned Development) | 1477.86 | 14.65% |
| | Subtotal | 6695.65 | 66.38% |
| **Total** | | **10,087.32** | **100.00%** |

FIGURE 4-4: EXISTING ZONING

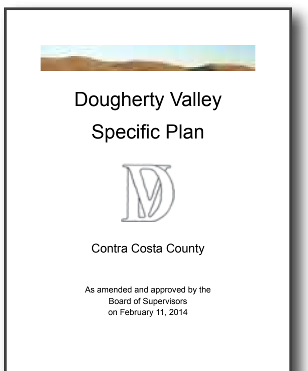


# Other Notable City and Regional Plans



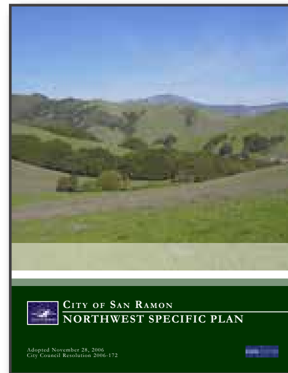

## San Ramon Village Specific Plan

The San Ramon Village Specific Plan, also known as the Crow Canyon Specific Plan, is a plan for a “mixed-use residential and retail village node” in an underutilized area of San Ramon. The purpose of the development plan is to strengthen San Ramon’s position as a commercial corridor, specifically using the heavy traffic volumes found at the intersection of San Ramon Valley Boulevard and Deerwood Road.



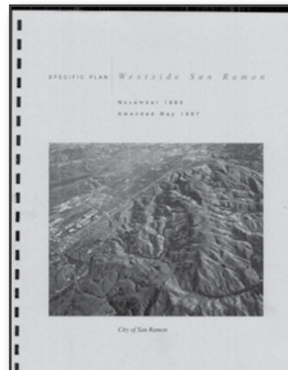

## Dougherty Valley Specific Plan

The Dougherty Valley Specific Plan is a plan approved by the Contra Costa Board of Supervisors for the Tri-Valley Area. The aim of the Dougherty Valley Specific Plan is to connect neighborhoods through trail systems, neighborhood parks, and schools to form a sense of unified community. In contrast to sprawling suburban development, the Dougherty Valley Specific Plan uses infill development and denser communities to create clusters of neighborhoods, each equipped with their own parks and schools.



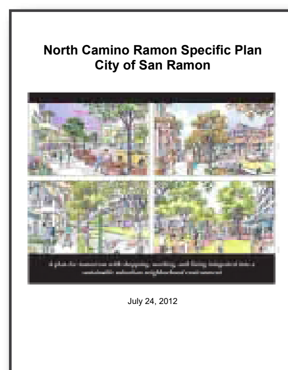

## Northwest Specific Plan

The Northwest Specific Plan covers a 354-acre area and proposes a vision of a balanced community composite by preserving at least 75 percent of the area for open space and public uses. The Plan includes multiple public trails, a riparian corridor, five residential neighborhoods, and more. The Plan aims to provide a multitude of housing types and densities within a unique surrounding natural environment.



## Westside Specific Plan

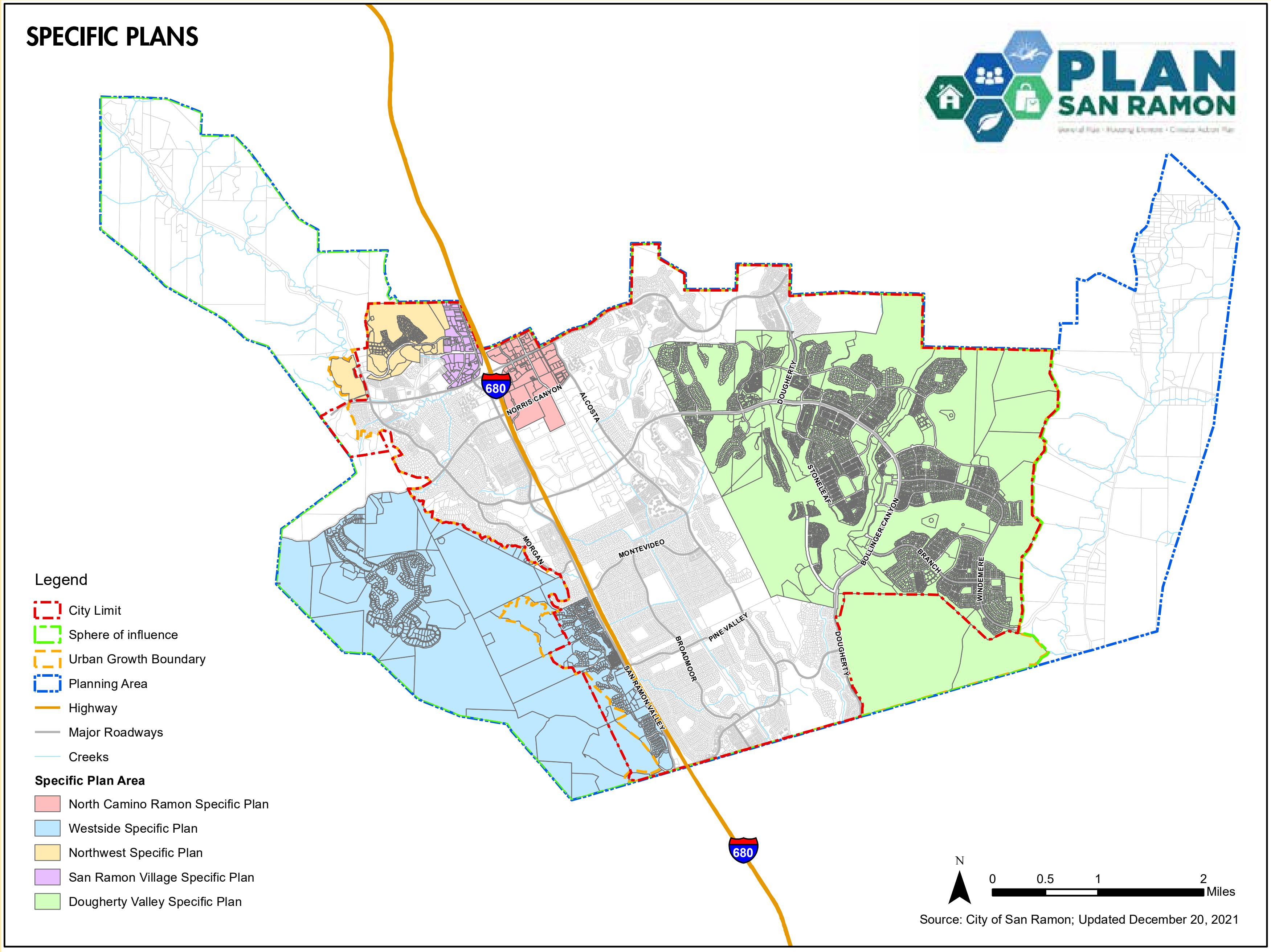
The Westside Specific Plan conserves and develops approximately 3,300 acres of hillside open space on the western side of San Ramon. The Plan Area acts as a western gateway into the City limits. Though the plan was first prepared in 1989, it was updated in 1997. Because of its age, the Westside Specific Plan acted as the baseline plan for the character of activities and development in San Ramon.




## North Camino Ramon Specific Plan

The North Camino Ramon Specific Plan (NCRSP) is a plan developed by the City of San Ramon. The North Camino Ramon Specific Planning Area aims to continue to promote the balance of San Ramon as a job-rich environment and a desirable place to live.  The NCRSP creates a City Center for the ever-evolving San Ramon.

## FIGURE 4-5: SPECIFIC PLAN AREAS



# Community Design

Community design and character play a vital role in the built environment and how people experience the City. Community design not only includes buildings, but also public infrastructure, which plays an important role in creating a distinct identity in neighborhoods and districts. In addition, community design has a considerable impact on economic development, community health, safety, and vitality.

It is important for decision-makers to understand the distinct identities and neighborhood characteristics within a community. In doing so, this allows them to make well-informed decisions that allow the community to develop in a manner that supports the needs of its residents and becomes an attractive place to live and work. San Ramon is a city that is built around community values, decisions about development, and preservation of open space. San Ramon has some notable amenities that contribute to the community character such as Central Park and the community center located adjacent to City Hall, a wide array of residential neighborhoods, scenic views of the surrounding hills, and the Bishop Ranch Business Park.

While San Ramon has a sizable employment base, the existing land use fabric is mostly comprised of single-family residential development concentrated mostly on the western and eastern portions of the City limits. The majority of commercial development is located adjacent to the I-680 corridor that spans north-south in the center of the community.

While the City is mostly flat along the I-680 corridor, hills surround the City on the east and west, offering spectacular view corridors throughout San Ramon. In addition, the terrain provides views of the residential neighborhoods that scatter the hillsides.

## San Ramon City Center

**San Ramon is unlike a majority of cities in the Tri-Valley as it does not have a formally-designated downtown. For this reason, it has been a long sought-after objective to establish a space that provides a community gathering space and town center. San Ramon City Center, located in Bishop Ranch, is one of San Ramon's latest developments that was open for business in late 2018. Designed by Renzo Piano Building Workshop, this 300,000 square foot development provides a long-awaited lifestyle center and community gathering space for residents and visitors of San Ramon. This new retail and entertainment hub is home to several restaurants, retail, and a luxury movie theater just off I-680 along Bollinger Canyon Road.**


*Source: Photo retrieved from www.citycenterbishopranch.com*

## Bishop Ranch

**Bishop Ranch, located right off the I-680 corridor to the east, the business park spans just past Norris Avenue to the north, and just beyond Bollinger Canyon to the south. Bishop Ranch has established San Ramon as a major employment center in the San Francisco Bay Area. Home to many Fortune 500 companies, tenants include AT&T, Chevron, PG&E, Ford Motor Company, General Electric, JPMorgan Chase, Bank of the West, and Robert Half International. Bishop Ranch accounts for nearly half of the non-residential floor space in the San Ramon Planning Area. Located in the heart of Bishop Ranch, Annabel Lake not only provides recreational activities to the campus, but also adds to the overall landscape of San Ramon.**

*Source: Photo retrieved from www.bishopranch.com*

*Source: Photo retrieved from www.citycenterbishopranch.com*


*Source: Photo retreived from www.visittrivalley.com*

## Civic Core

**As part of Bishop Ranch, the Central Park, San Ramon Community Center, San Ramon Skatepark, City Hall, and Fire Station 34 mark the civic core of San Ramon. Central Park is home to tennis courts, a playground, skatepark, baseball fields and adjacency to the Iron Horse Trail, are just a few of the key identifying elements of this community space. San Ramon City Hall, the newest addition to this space, houses the City's Council Chamber, public meeting rooms, offices, and a large lobby in a contemporary two-story building.**

## Regional Connection

**BART is the regional public transit connection to San Francisco to the East Bay, South Bay, and the eastern tip of Silicon Valley. While San Ramon does not have a BART station, the nearest station is the West Dublin/Pleasanton Station located approximately 5.5 miles south at the I-580/I-680 intersection. I-680 is the primary regional automobile access. The Iron Horse trail provides bicycle and pedestrian access between the cities of Concord and Pleasanton and creates an important recreational and commute component for San Ramon. The trail connects residential and commercial areas, business parks, schools, public transportation (BART, County Connection), open space and parks, regional trails, and community facilities.**

*Source: Photo retreived from www.bart.gov*

*Source: Photo retreived from www.activerain.com*

*Source: Photo retreived from www.ehomesurf.com*

## Residential Neighborhoods

**Most of the homes located directly east of I-680 are older and predominantly one- and two-story single family residential. The homes to the west of I-680 adjacent to Bishop Ranch Regional Preserve as well as further out to the east surrounding Bridges and Canyon Lakes Golf Courses are much newer and are a mix of single family, townhomes, and apartments. Most of San Ramon's recent residential development is located on the eastern perimeter of the Planning Area around Bollinger Canyon Road. These communities are predominantly builder/developer centric with a wide variety of housing typologies at varying densities. These neighborhoods provide a wide range of amenities such as bike paths, hiking/biking trails, neighborhood parks, and scenic vistas.**


PLAN
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General Plan • Housing Element • Climate Action Plan

# 5. HOUSING

*Housing is a critical component of health and well-being in a community. Individuals and families require safe, adequate, secure, and affordable housing. The City of San Ramon strives to achieve a balanced housing stock that meets the needs of all economic segments of the community. This section provides an analysis of housing trends in San Ramon today.*

***Section 65302(c) of the California Government Code requires that the City of San Ramon adopt a Housing Element as part of the General Plan to analyze issues of housing availability, affordability, and needs within the community. In addition, the Housing Element seeks to set goals, policies, programs, and implementation strategies to address those issues.***

***Unlike the other elements of a General Plan, Housing Elements are required to be updated on a State-mandated review cycle. The current Housing Element was certified in 2015 in the 5th Housing Element cycle and established the City's housing policies for the planning period of January 31, 2015, through January 31, 2023. The upcoming 6th Cycle Housing Element is currently (2021) being drafted by City staff and will cover an eight-year planning period of 2023-2031.***

# Housing Units

State law requires each city and county to plan for its "fair share" of the statewide housing need. This fair share is calculated through a process called the Regional Housing Needs Allocation (RHNA). For the 6th cycle 2023-2031 RHNA projection period, the City of San Ramon was assigned a RHNA of 5,111 housing units. The 6th Cycle RHNA is significantly higher (more than 300 percent increase) than the 2015-2023 RHNA, which identified a need of 1,417 new housing units. Based on the amount of housing production expected by the California Department of Housing and Community Development from 2023-2031, the City will need to create the conditions for sufficient housing production to meet its regional need (RHNA).

***Please note that although the 6th Cycle housing element is termed "2023-2031" the planning period technically begins on June 30, 2022, and runs through December 31, 2030. Units approved during this planning period may be counted against the City's 6th Cycle RHNA goals.***

While more than 2,000 new housing units were approved in San Ramon during the 5th Cycle, a vast majority were for Above Moderate-Income households. Between 2015 and 2020, only 31 very low- and 93 low-income units were approved by the City. By comparison, more than 1,800 new above moderate-income units were approved during this time. Table 5-1 shows permitted units in San Ramon from 2015-2020.

**TABLE 5-1: BUILDING PERMITS ISSUES FOR HOUSING DEVELOPMENT APPLICATIONS BY YEAR**

| Income Level | | RHNA Allocation by Income Level | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 | Total Units to Date (all years) | Total Remaining RHNA by Income Level |
|---|---|---|---|---|---|---|---|---|---|---|
| Very Low | Deed Restricted | 516 | | 20 | | | 6 | 5 | 31 | **485** |
| | Non-Deed Restricted | | | | | | | | | |
| Low | Deed Restricted | 279 | | 82 | | | 6 | 5 | 93 | **186** |
| | Non-Deed Restricted | | | | | | | | | |
| Moderate | Deed Restricted | 282 | | | | | | | 164 | **118** |
| | Non-Deed Restricted | | 2 | 162 | | | | | | |
| Above Moderate | | 340 | 386 | 618 | 188 | 275 | 240 | 94 | 1801 | |
| Total RHNA | | **1417** | | | | | | | | |
| **Total Units** | | | **388** | **882** | **188** | **275** | **252** | **104** | **2089** | **789** |

*Source: City of San Ramon, Housing Element Annual Progress Report, March 2021.*

# Vacancy Rate

Vacancy rates are an important indicator of housing availability. A certain number of vacant units are needed to moderate the cost of housing, allowing sufficient choice for residents, and providing an incentive for unit upkeep and repair. Specifically, a vacancy rate of 1.5 to 2 percent for ownership housing and 5 to 6 percent for rental housing is considered necessary to balance demand and supply for housing. (Source: existing 5th Cycle HE)

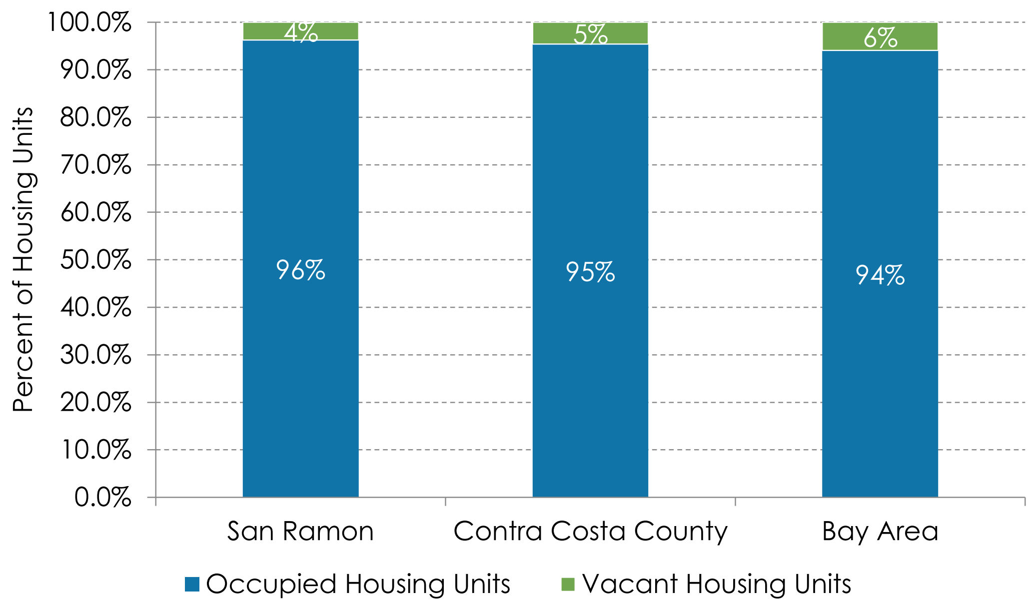
According to the American Community Survey, the overall vacancy rate for housing units in San Ramon was 4 percent in 2019, including units vacant for seasonal or occasional use, rented, and sold units that were vacant, and other unclassified vacant units. As shown in Table 5-2 and on Figure 5-1, the vacancy rate in San Ramon was lower in both 2010 (4 percent) and 2020 (4 percent) than the countywide and statewide vacancy rate, which was 7 percent in 2010 and 5 percent in 2020.

**TABLE 5-2: HOUSING OCCUPANCY STATUS**

| | 2010 | | 2019 | |
|---|---|---|---|---|
| | California | San Ramon | California | San Ramon |
| Total Units: | 396,782 | 24,809 | 413,719 | 26,525 |
| Occupied Units | 368,087 | 23,734 | 394,769 | 25,535 |
| Vacant Units | 28,695 | 1,075 | 18,950 | 990 |
| Vacancy Rate | **7%** | **4%** | **5%** | **4%** |

*Source: U.S. Census Bureau, 2019 American Community Survey 5-Year Estimates, Table B25002.*

**FIGURE 5-1: VACANCY RATES FOR 2019**




*Source: U.S. Census Bureau, 2019 American Community Survey 5-Year Estimates, Table B25002.*

# Housing Mix

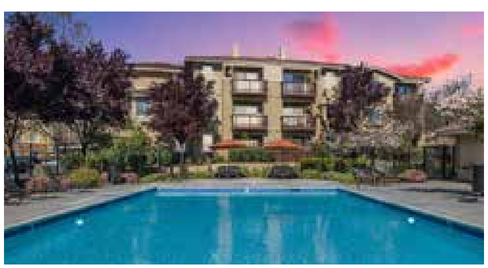
As shown in Table 5-3 and Figure 5-2, the California Department of Finance (DOF) estimates that in 2020, the majority (62.6 percent) of the City's housing stock was single-family detached homes. The second most common type of housing was multifamily with five or more units (22.8 percent), followed by single-family attached (10.5 percent). Trends show that between 2010 and 2020, production of multifamily housing with five or more units increased, while the percentage of single-family attached homes increased by about 1 percent. It is important to note that during the same 10-year period no mobile home units were developed in the City.

= 62.6%

Single-Family Detached in San Ramon

= 10.5%

Single-Family Attached in San Ramon



= 26.7%

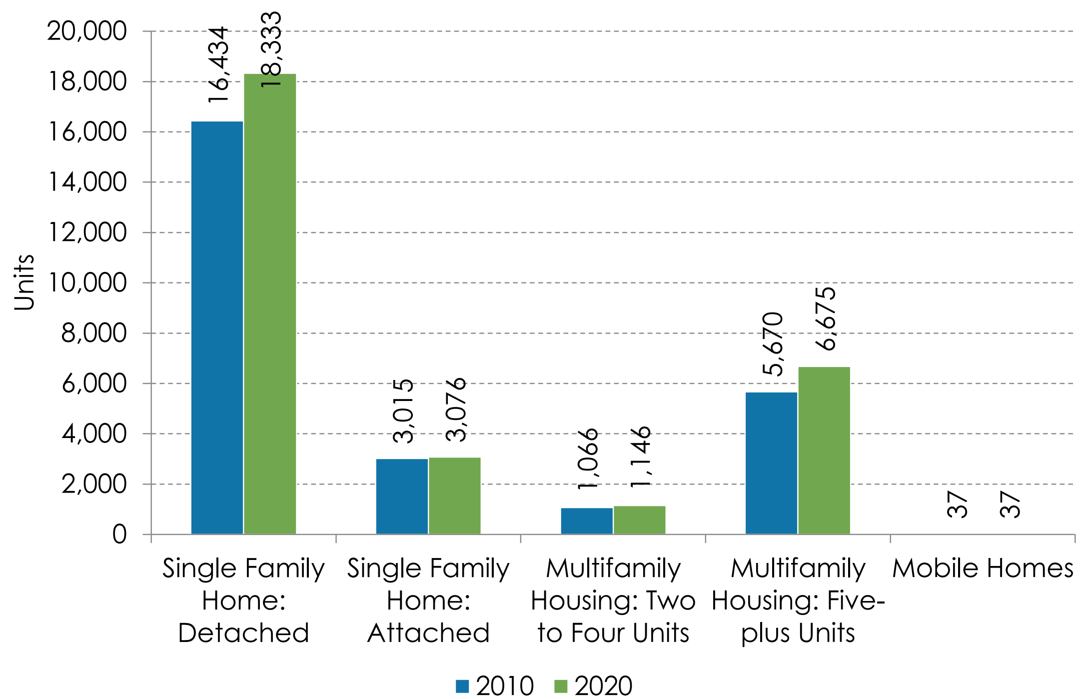
Multifamily Housing in San Ramon

**TABLE 5-3: HOUSING TYPES MIX**

| Building Type | 2010 | % of Total | 2020 | % of Total |
|---|---|---|---|---|
| Single Family Home: Detached | 16,434 | 62.7% | 18,333 | 62.6% |
| Single Family Home: Attached | 3,015 | 11.5% | 3,076 | 10.5% |
| Multifamily Housing: Two to Four Units | 1,066 | 4.1% | 1,146 | 3.9% |
| Multifamily Housing: Five-plus Units | 5,670 | 21.6% | 6,675 | 22.8% |
| Mobile Homes | 37 | 0.1% | 37 | 0.1% |
| Totals | **26,222** | | **29,267** | |

*Source: California Department of Finance, E-5 series, 2020.*

**FIGURE 5-2: HOUSING TYPE MIX**




*Source: California Department of Finance, E-5 series, 2020.*

## Age of Housing Stock

If not properly and regularly maintained, housing can lead to deteriorating neighborhood conditions, decreasing property values and impacting community pride and quality of life. Data shows that 44 percent of the housing units in the City were built prior to 1990 and are over 30 years old (Table 5-4). While 56 percent of the housing stock is newer, most of these units were built between 1990 and 2009. Only 8 percent of the housing stock was constructed between 2010 and 2019.

**TABLE 5-4: HOUSING UNITS BY YEAR BUILT**

| Year Built | Number of Units | % of Total | Combined |
|---|---|---|---|
| 2010 to 2019 | 2,170 | 8% | 56% |
| 2000 to 2009 | 8,432 | 32% | |
| 1990 to 1999 | 4,461 | 17% | |
| 1980 to 1989 | 5,978 | 22% | 44% |
| 1970 to 1979 | 3,576 | 13% | |
| 1960 to 1969 | 1,492 | 6% | |
| 1950 to 1959 | 388 | 1% | |
| 1940 to 1949 | 68 | >1% | |
| 1939 or earlier | 132 | >1% | |
| **Totals** | **26,525** | | |

*Source: U.S. Census Bureau, American Community Survey 5-Year Data (2015-2019), Table B25034.*

## Homeownership

Home equity is the largest single source of household wealth for most Americans. According to the Survey of Consumer Finances, released in September 2020 by the Federal Reserve, homeowners in the U.S. had a median net worth of $255,000, while renters had a net worth of just $6,300. This is a considerable difference.

San Ramon has a high rate of homeownership. In 2019, 72 percent of San Ramon residents owned their homes (Figure 5-3). This contrasts with Contra Costa County, where 66 percent of residents owned their homes, and with the Bay Area as a whole, where 56 percent of residents owned their homes.

**FIGURE 5-3: HOUSING TENURE**

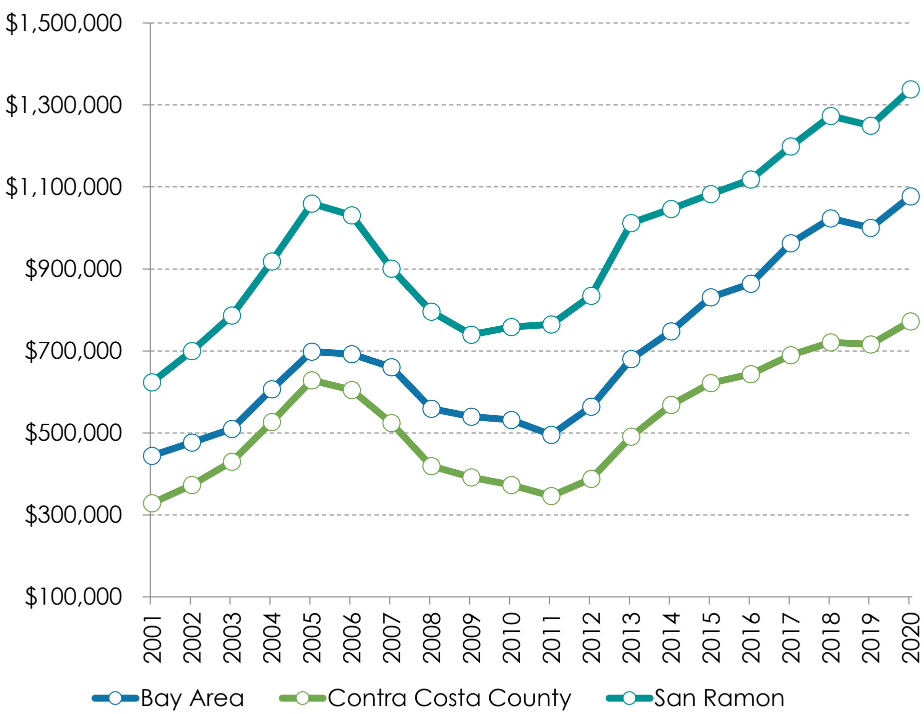
| OWNER OCCUPIED | RENTER OCCUPIED | |
|---|---|---|
| 72% | 28% | San Ramon |
| 66% | 34% | Contra Costa County |
| 56% | 44% | Bay Area |

*Source: U.S. Census Bureau, American Community Survey 5-Year Data (2015-2019), Table B25003.*

# Housing Prices

Median home prices in San Ramon and Contra Costa County have been steadily rising since 2009 following the real estate crash and Great Recession of 2008. According to the Zillow Home Value Index, the median home value in San Ramon in 2009 was $739,440 and $391,437 countywide. By 2020, home values had increased significantly to $1,338,248 in San Ramon and $772,413 countywide. Figure 5-4 show home values in San Ramon, Contra Costa County, and the Bay Area between 2001 and 2020.

**FIGURE 5-4: ZILLOW HOME VALUE INDEX**




*Source: HCD Preapproved Data Package – 6th Cycle, Zillow Home Value Index (ZHVI), 2020.*

# Housing Affordability

Many households throughout the country struggle to afford decent housing. While higher-income households have more discretionary income to spend on housing, moderate- and lower-income households are limited in the range of housing that they can afford. A “cost-burdened” household pays more than 30 percent of gross household income for housing and utilities, while a “severely cost-burdened” household pays more than 50 percent. For renters, housing-related costs may be the gross rent (contract rent plus utilities), whereas for a homeowner, housing-related costs may include mortgage payment, utilities, insurance, and real estate taxes.

Table 5-5 and Figure 5-5 show overpayment data by income group for San Ramon. The data shows that renter-occupied households struggle with cost burdened housing at a much higher rate than owner occupied households. In 2019, approximately 45 percent of renters paid more than 30 percent of their income on housing compared to 27 percent of owners.

Table 5-6 shows overpayment data by income level. The households with the highest incidence of cost burden were extremely low- (93 percent) and very low-income (91 percent) categories. Other high incidences of cost burden were found with low-income residents, of which 76 percent paid more than 30 percent of their income on housing. Among those in the moderate-income range, 66 percent overpaid for housing. Notably, residents with income equivalent to the area median income experience very low rates of overpayment. Among this group, only 19 percent are overpaying for housing.

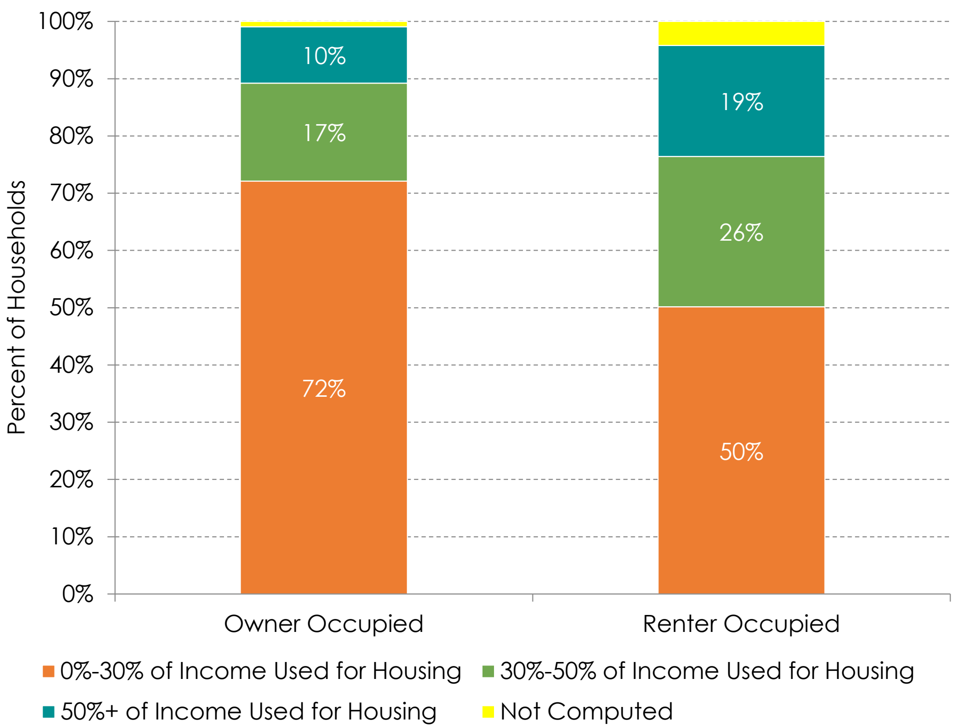
## TABLE 5-5: OVERPAYING HOUSEHOLDS BY TENURE

| | Overpaying Households | | | |
|---|---|---|---|---|
| Tenure | 0%-30% of Income Used for Housing | 30%-50% of Income Used for Housing | 50%+ of Income Used for Housing | Not Computed[1] |
| Owner Occupied | 13,330 | 3,161 | 1,820 | 173 |
| Renter Occupied | 3,537 | 1,849 | 1,370 | 295 |
| **Totals** | **16,867** | **5,010** | **3,190** | **468** |

*Source: HCD Preapproved Data Package – 6th Cycle, U.S. Census Bureau, American Community Survey 5-Year Data (2015-2019), Table B25070, B25091.*

*[1] Units for which no rent is paid and units occupied by households that reported no income or a net loss comprise the category, "Not computed."*

## FIGURE 5-5: COST BURDENED HOUSEHOLDS




*Source: HCD Preapproved Data Package – 6th Cycle, U.S. Census Bureau, American Community Survey 5-Year Data (2015-2019), Table B25070, B25091.*

## TABLE 5-6: OVERPAYING HOUSEHOLDS INCOME LEVEL

| | | Overpaying Households | | |
|---|---|---|---|---|
| Income Group | 0%-30% of Income Used for Housing | 30%-50% of Income Used for Housing | 50%+ of Income Used for Housing | % Overpaying |
| Extremely Low-Income: 0%-30% of AMI | 94 | 118 | 1,075 | 93% |
| Very Low-Income: 31%-50% of AMI | 115 | 320 | 780 | 91% |
| Low-Income: 51%-80% of AMI | 350 | 610 | 510 | 76% |
| Moderate Income: 81%-100% of AMI | 599 | 780 | 380 | 66% |
| Above Moderate-Income: Greater than 100% of AMI | 15,275 | 3,245 | 340 | 19% |
| **Totals** | **16,433** | **5,073** | **3,085** | |

*Source: HCD Preapproved Data Package – 6th Cycle, U.S. Department of Housing and Urban Development (HUD), Comprehensive Housing Affordability Strategy (CHAS) ACS tabulation, 2013-2017 release.*

# Overcrowding

The U.S. Census defines overcrowded households as households that have more than one person per room, not including hallways, kitchens, or bathrooms. Severe overcrowding is defined as households with more than 1.5 persons per room. A high prevalence of overcrowding can indicate a community does not have adequate supply of affordable housing, especially for large families. Overcrowding also tends to cause housing deterioration more rapidly. Therefore, maintaining a reasonable supply of housing and alleviating overcrowding is important for enhancing the quality of life in San Ramon.

From 2013-2017, San Ramon had a lower rate of overcrowding in owner-occupied households at 1.8 percent compared to statewide rate of 4.0 percent (Table 5-7). Similarly, data shows that renter-occupied households experienced a lower rate of overcrowding in San Ramon (7.0 percent) than statewide (13.3 percent).

### TABLE 5-7: OVERCROWDING BY TENURE

| | San Ramon | | California | |
|---|---|---|---|---|
| | Owner-Occupied Households | Renter-Occupied Households | Owner-Occupied Households | Renter-Occupied Households |
| Overcrowded (More than 1.0 persons/room) | 1.8% | 7.0% | 4.0% | 13.3% |
| Severely overcrowded (More than 1.5 persons/room) | 0.2% | 2.0% | 1.0% | 5.0% |

*Source: HCD Preapproved Data Package – 6th Cycle, U.S. Department of Housing and Urban Development (HUD), Comprehensive Housing Affordability Strategy (CHAS) ACS tabulation, 2013-2017 release.*

PLAN SAN RAMON

# 6. MOBILITY

*San Ramon's transportation network and services provide mobility for residents, employees, and visitors, and serve goods movement throughout the Planning Area.*

*It's easy to think of transportation as primarily the roadway network, serving vehicles. But this network serves walking and biking trips, bus trips, trips by all modes to and from the West Dublin/Pleasanton BART, Dublin/Pleasanton BART, Walnut Creek BART, and Pleasanton ACE stations, and relatively new travel modes such as ride hailing and micro-mobility trips (scooters and bicycle share). With these nearby BART stations and multiple connections to Interstates 580 and 680, the City enjoys good access to regional destinations. San Ramon is also fortunate to have the Iron Horse Regional Trail, allowing many walking and biking trips to be made off-road with fewer vehicle interactions.*

# Roadway Network

Figure 6-1 shows the City's primary roadway network. Regional travel is served by I-680, connecting to I-580 to the south and State Route 24 to the north. Several arterials serve citywide travel, supported by collector roadways that connect the arterials to local residential and commercial streets.

# Bicycle Facilities

The City of San Ramon has an extensive bicycle network. The bicycle network is comprised of the following facilities:

- **Class I Multi-Use Path:** A two-way paved facility that is physically separated from motor vehicle traffic, used by bicyclists, pedestrians, and other active modes. Multi-use paths are often located independent of the roadway network, such as a greenway. Trails are unpaved paths accessible by bicycle and pedestrians.
- **Class II Bicycle Lane:** An exclusive space for bicyclists established by painting lines and symbols on the roadway surface. Bicycle lanes are for one-way travel, typically provided in both directions on two-way streets or on one side of a one-way street. Buffered bicycle lanes use paint to create a flush buffer zone between bicyclists and an adjacent travel or parking lane.
- **Class III Bike Route:** Roadways where signage indicates the roadways are shared by bicyclists and motor vehicle traffic. Bike Routes should be located on roadways with low traffic speeds and volumes. Bicycle Boulevards are applied on quiet streets, often in residential neighborhoods, prioritizing bicycle through-travel, and often include elements of traffic calming.
- **Class IV Separated Bike Lane (also known as "cycle tracks" or "protected bike lanes"):** This facility provides a right-of-way designated exclusively for bicycle travel within a roadway which is physically separated from motor vehicle traffic by barriers. Barriers could include raised islands, planters, flexible posts, or on-street parking.

The City of San Ramon Bicycle Master Plan provides guidance for the expansion and improvement of bicycle facilities and supportive programs throughout the City. Figure 6-2 shows the current bicycle network and currently planned improvements.

# Transit Services

San Ramon does not have any active rail lines, but local transit providers provide bus service to Bay Area Rapid Transit (BART) and Altamont Commuter Express (ACE) stations in nearby cities.

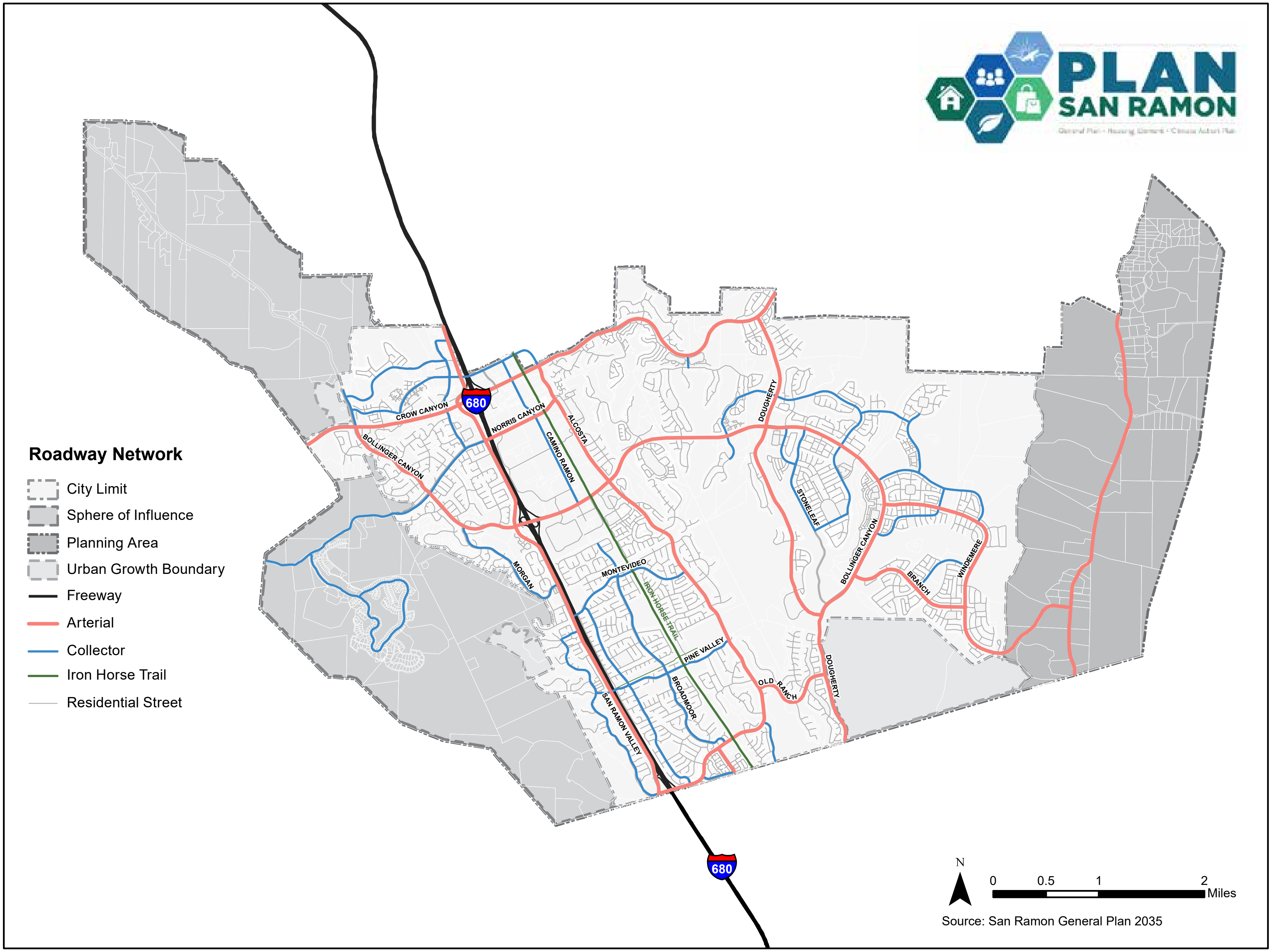
The Central Contra Costa Transit Authority operates The County Connection, a transit service that provides bus service to the cities of Walnut Creek, Concord, Martinez, Lafayette, Orinda, Clayton, Moraga, Pleasant Hill, Alamo, and the San Ramon Valley. The County Connection currently offers seven routes within the City of San Ramon providing access to the San Ramon Transit Center, City Center Bishop Ranch (City Center), Diablo Valley College (DVC), Walnut Creek BART, Dublin/Pleasanton BART, and other key destinations (refer to Figure 6-3). Bus routes serving San Ramon typically operate at 30-minute headways during peak commute hours and 60-minute headways during off-peak hours.

TRAFFIX is a traffic congestion relief program funded by Measure J, the one-half cent sales tax approved by Contra Costa voters in 2004. The purpose of the program is to reduce traffic congestion caused by parents driving their children to and from school through some of San Ramon Valley's most congested intersections. Service was implemented in August 2009.

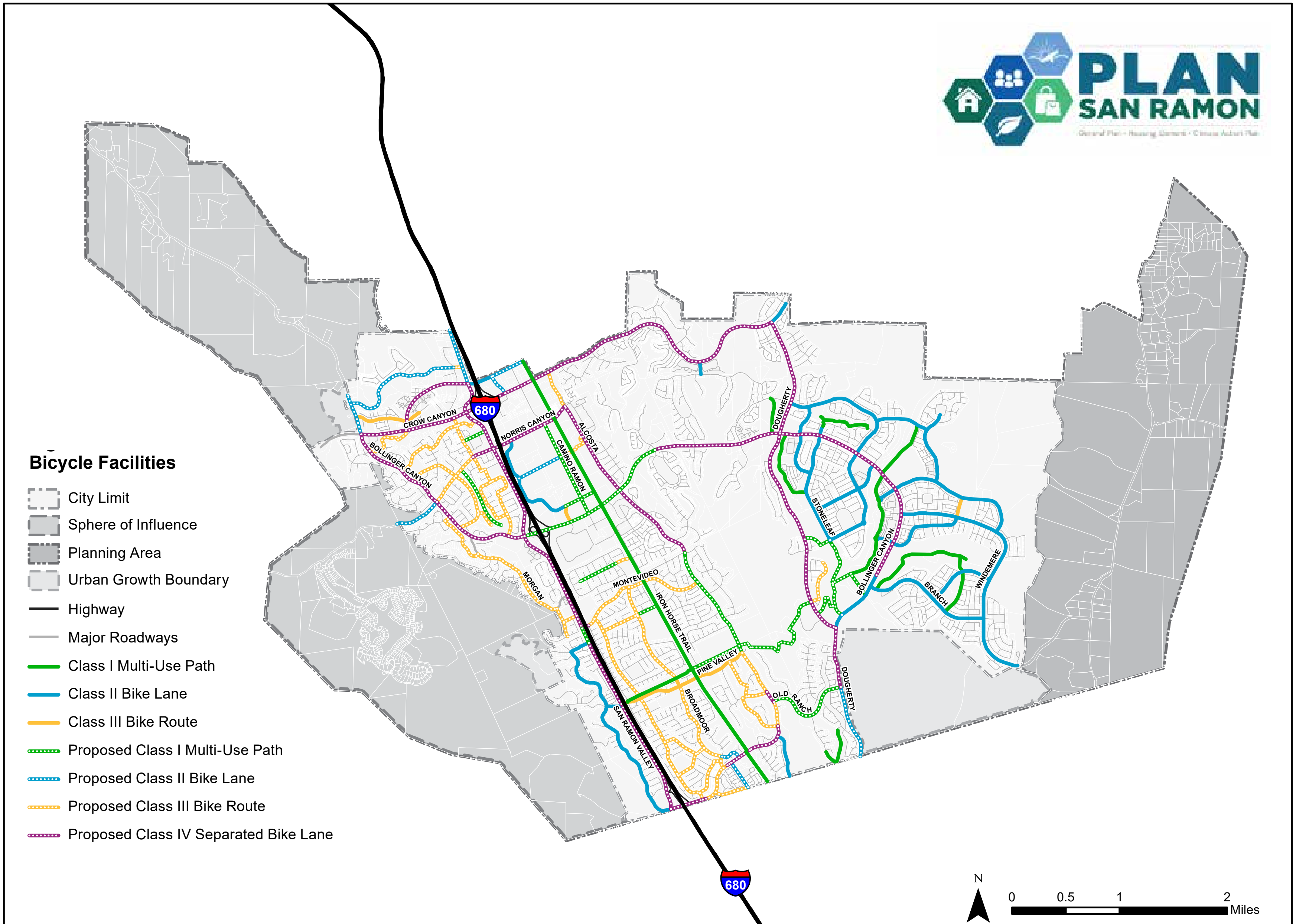
TRAFFIX oversees bus service to 11 school sites in the San Ramon Valley Unified School District, reducing congestion both near the sites and throughout the City.

In 2020, the City started a ride share pilot program called GoSanRamon. Through this program, users receive a subsidized fare for Uber and Lyft rides that start and end within designated areas of the City. The service area includes parts of south and west San Ramon, as well as the San Ramon Transit Center, San Ramon Regional Medical Center, Kaiser, Alcosta Senior and Community Center, and West Dublin and Dublin/Pleasanton BART stations.

**FIGURE 6-1: SAN RAMON ROADWAY NETWORK**

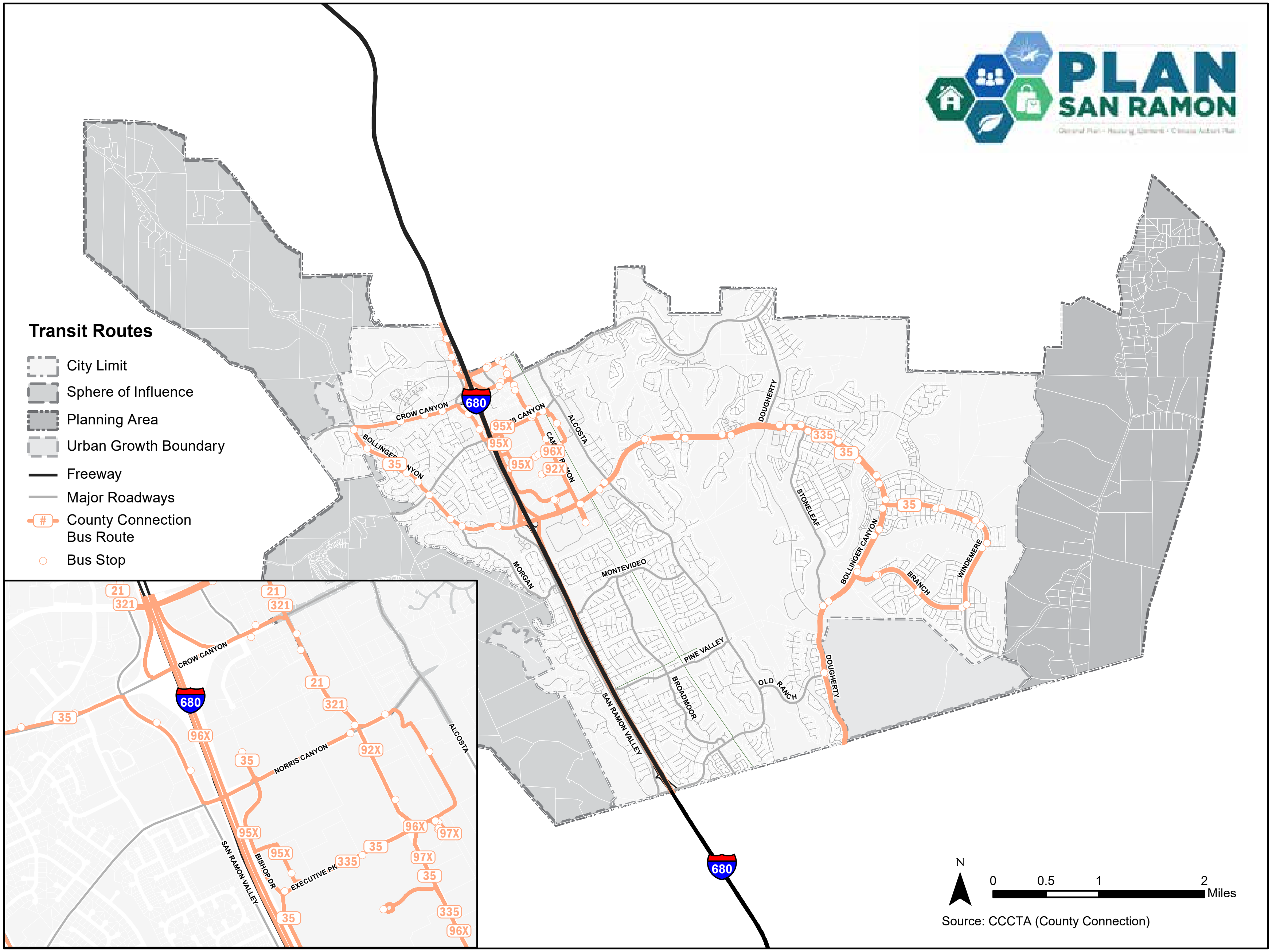


## FIGURE 6-2: SAN RAMON BICYCLE FACILITIES




Source: City of San Ramon Bicycle Master Plan (April 2018)

## FIGURE 6-3: SAN RAMON TRANSIT ROUTES



Source: CCCTA (County Connection)

# Travel Characteristics

## San Ramon Residents

### HOW DO THEY TRAVEL TO WORK?

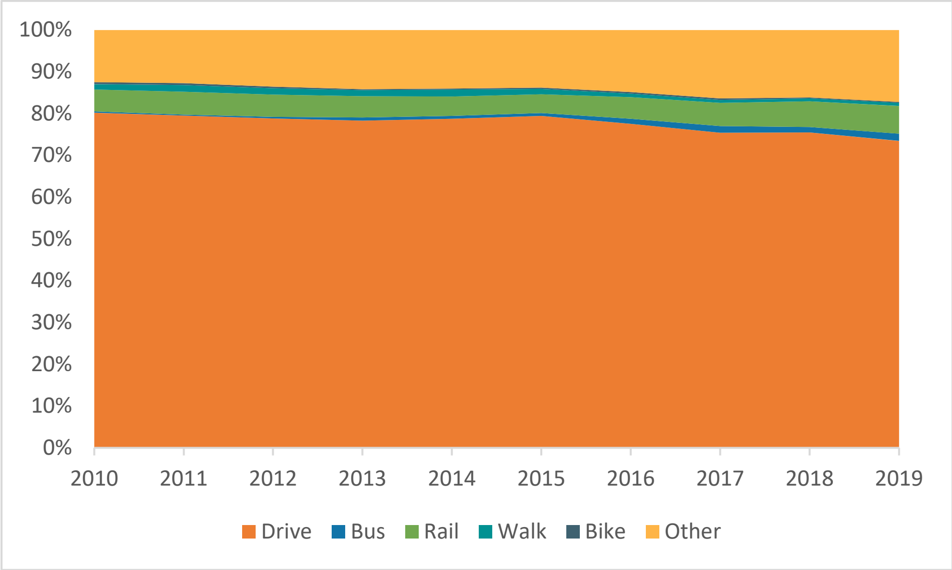
San Ramon residents overwhelmingly commute by car, with a significant minority using transit and other active travel modes. From 2011 to 2019, there was a 7 percent decrease in auto mode share, made up by growth in bus, rail, and other commutes. Other commutes, including those working from home, increased from 12 percent to 19 percent between 2010 and 2019 and is expected to increase in the future.

### HOW LONG ARE RESIDENTS COMMUTES?

Though approximately half of San Ramon residents commute less than 30 minutes to work, there has been significant growth in commutes lasting more than an hour. This could be linked to increased job growth in San Francisco and Silicon Valley, as well as increased regional freeway congestion.

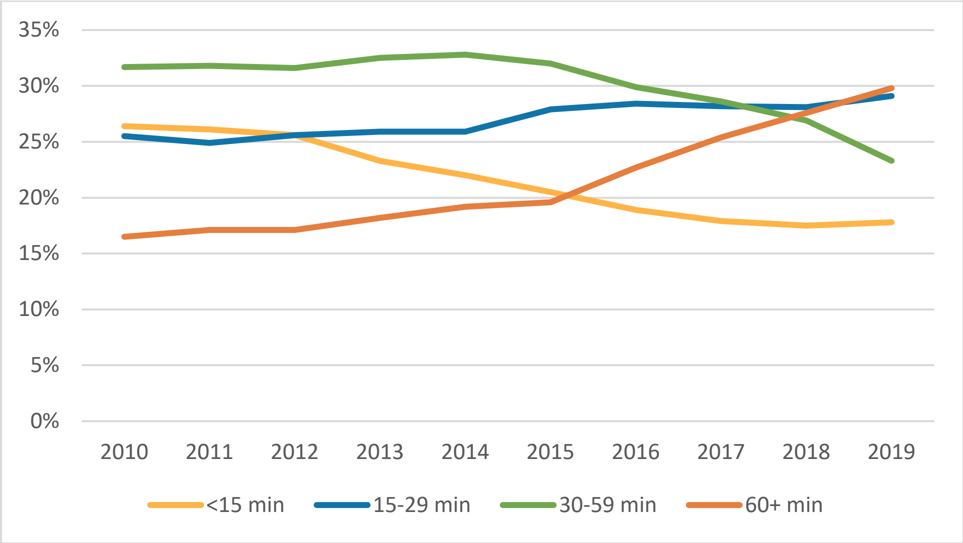
***The described travel behavior of San Ramon residents and workers is based on 2011 through 2019 data from the US Census. Post-Covid data was not available at the time this report was prepared.***

**FIGURE 6-4: COMMUTE MODESHARE (RESIDENTS)**




*Source: American Community Survey 5-Year Estimates, 2015-2019, Table B08301. Other category includes those working from home.*

**FIGURE 6-5: COMMUTE TIMES (RESIDENTS)**

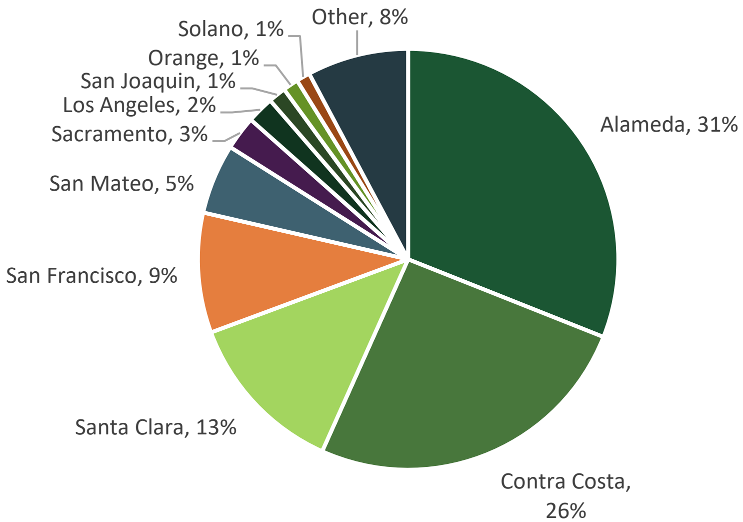



*Source: American Community Survey 5-Year Estimates, 2015-2019, Table S0801.*

## WHERE DO RESIDENTS WORK?

The US Census Bureau's Longitudinal Employer-Household Dynamics (LEHD) program provides detailed information on commute patterns, in the form of job flows to and from census blocks. Most San Ramon residents work in Alameda and Contra Costa Counties, with Santa Clara County having the third-highest count (see Figure 6-6). Though there has not been significant growth in the proportion of commuters working in San Francisco, the increase in bus and rail ridership may be the result of worsening freeway congestion.

### FIGURE 6-6: RESIDENT EMPLOYMENT LOCATIONS BY COUNTY, 2018




*Source: US Census Bureau, Longitudinal Employer-Household Dynamics, 2018.*

### TABLE 6-1: SAN RAMON RESIDENT EMPLOYMENT LOCATIONS

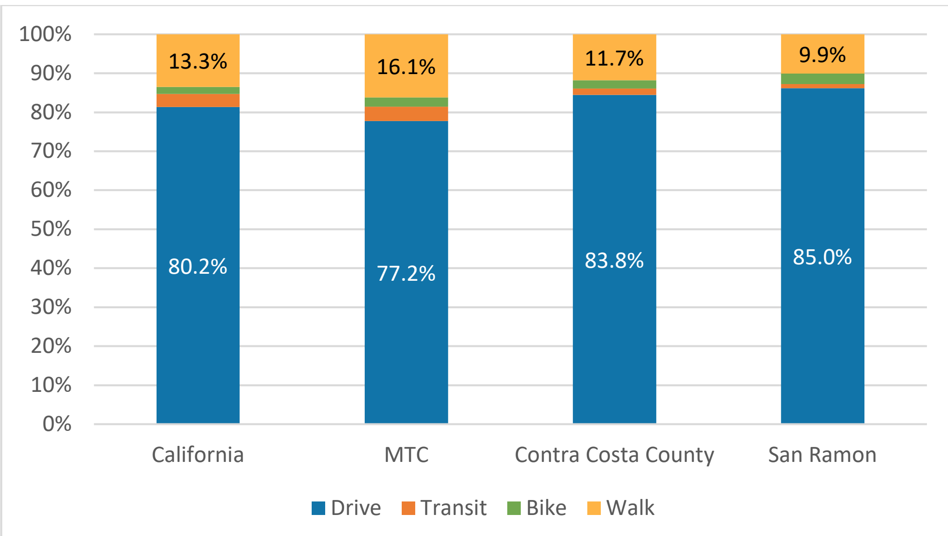
| Employment Locations | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|
| County | City | 2010 | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 |
| **Alameda** | | **32%** | **28%** | **29%** | **28%** | **30%** | **31%** | **32%** | **31%** | **31%** |
| | Pleasanton | 5% | 5% | 6% | 6% | 6% | 7% | 7% | 7% | 8% |
| | Oakland | 7% | 6% | 6% | 6% | 6% | 6% | 6% | 6% | 6% |
| | Fremont | 3% | 3% | 3% | 3% | 3% | 4% | 4% | 4% | 3% |
| | Livermore | 3% | 3% | 2% | 2% | 3% | 3% | 3% | 3% | 3% |
| | Hayward | 3% | 3% | 3% | 3% | 3% | 3% | 3% | 3% | 2% |
| **Contra Costa** | | **29%** | **26%** | **25%** | **25%** | **25%** | **27%** | **27%** | **26%** | **26%** |
| | San Ramon | 11% | 11% | 11% | 11% | 11% | 13% | 12% | 12% | 12% |
| | Walnut Creek | 4% | 4% | 3% | 3% | 3% | 3% | 3% | 3% | 3% |
| | Danville | 6% | 3% | 3% | 3% | 3% | 3% | 3% | 3% | 3% |
| **Santa Clara** | | **11%** | **12%** | **13%** | **13%** | **13%** | **12%** | **12%** | **12%** | **13%** |
| | San Jose | 5% | 5% | 5% | 5% | 6% | 5% | 5% | 5% | 5% |
| **San Francisco** | | **8%** | **9%** | **8%** | **9%** | **9%** | **9%** | **9%** | **9%** | **9%** |

*Source: US Census Bureau, Longitudinal Employer-Household Dynamics, 2010-2018.*

### WHAT ABOUT NON-WORK TRIPS?

San Ramon non-work trips are also primarily vehicle-based, although the proportion of walking trips is significant. Since these trips include shopping and recreational trips, San Ramon's access to the regional Iron Horse Trail, as well as shopping areas adjacent to housing likely accounts for this higher percentage of walking trips.

#### FIGURE 6-7: HOME-BASED OTHER (HBO) TRIP MODESHARES




*Source: California Household Travel Survey, 2012-2013.*

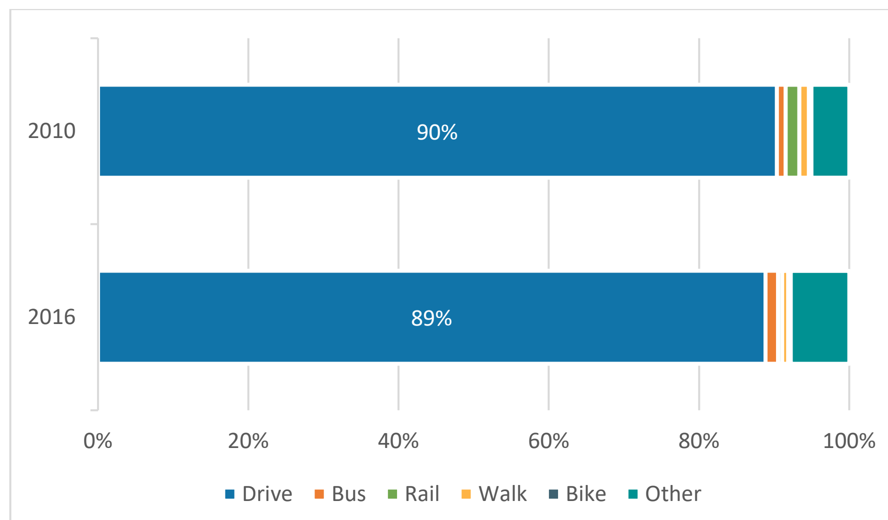
## San Ramon Workers

According to the LEHD Data, there are 43,430 workers in San Ramon. Understanding their travel behaviors is crucial to understanding travel habits, ensuring future transportation planning reflects the local employment context.

### HOW DO THEY COMMUTE TO SAN RAMON?

Workers in San Ramon continue to mostly drive to work (around 90 percent), though approximately 73 percent of San Ramon residents drive to work as shown in Figure 6-8. Perhaps the most significant change among both San Ramon workers and residents commute habits are the increases seen in the “other” travel mode category, which includes those working from home. This commute mode increased by 3 percent between 2010 and 2016 for both San Ramon workers and residents and is expected to continue to increase in the future due to changes in workplace practices experienced during the COVID-19 shelter-in-place period.

#### FIGURE 6-8: COMMUTE MODESHARES (WORKERS)




*Source: American Community Survey 5-Year Estimates, Special Tabulation: Census Transportation Planning Products Program, 2012-2016, Table A202113. Other category includes those working from home.*

### WHERE DO SAN RAMON WORKERS LIVE?

San Ramon worker commute origins did not change significantly from 2010 to 2018, but they are slightly different than resident commute destinations. Communities such as Pleasanton, San Francisco, and Oakland, along with other nearby cities, are significant sources of employment, and improving bicycle and transit connections between San Ramon and these cities may provide significant reduction in congestion and increase livability benefits.

**TABLE 6-2: SAN RAMON WORKERS HOME LOCATIONS**

| Workers Home Locations | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|
| County | City | 2010 | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 |
| **Contra Costa** | | **38%** | **38%** | **38%** | **38%** | **37%** | **39%** | **38%** | **37%** | **37%** |
| | San Ramon | 8% | 10% | 11% | 10% | 10% | 11% | 11% | 11% | 11% |
| | Danville | 5% | 5% | 5% | 5% | 5% | 5% | 4% | 4% | 4% |
| | Concord | 4% | 4% | 4% | 4% | 4% | 4% | 4% | 4% | 4% |
| **Alameda** | | **24%** | **26%** | **26%** | **26%** | **26%** | **27%** | **27%** | **27%** | **26%** |
| | Oakland | 3% | 4% | 4% | 4% | 4% | 4% | 4% | 4% | 4% |
| | Dublin | 2% | 3% | 3% | 3% | 3% | 3% | 3% | 3% | 3% |
| | Pleasanton | 3% | 3% | 3% | 3% | 3% | 3% | 3% | 3% | 3% |
| | Livermore | 3% | 3% | 3% | 3% | 3% | 3% | 3% | 3% | 3% |
| | Fremont | 2% | 3% | 3% | 3% | 2% | 3% | 3% | 3% | 3% |
| **Santa Clara** | | **6%** | **6%** | **6%** | **6%** | **6%** | **6%** | **6%** | **6%** | **6%** |
| | San Jose | 3% | 3% | 3% | 3% | 3% | 3% | 3% | 3% | 3% |
| **San Francisco** | | **3%** | **3%** | **3%** | **3%** | **3%** | **3%** | **3%** | **3%** | **3%** |

*Source: US Census Bureau, Longitudinal Employer-Household Dynamics, 2010-2018.*

# Transportation Demand Management (TDM)

Transportation Demand Management (TDM) is the application of projects, policies, and programs aimed at reducing travel demand from single-occupant vehicles over time and space. TDM strategies are used to reduce vehicle travel, with an emphasis on reducing travel during peak periods. TDM is intended to reduce congestion and improve traffic flow without having to increase the capacity or physical size of a section of transportation infrastructure. TDM strategies and programs could include measures such as alternative work schedules, bicycle parking, showers, and route maps for employees, subsidized transit passes, and future measures as programs and technologies evolve. Transportation is the leading source of carbon emissions in the United States, and nearly one-third of greenhouse gas (GHG) emissions in Contra Costa County come from surface transportation emissions. Reducing the distance and number of vehicle trips can improve traffic levels and contribute to the broader goal of reducing the community's collective carbon footprint. The City of San Ramon participates in regional, countywide, and municipal TDM programs. Regionally, the Bay Area Air Quality Management District (BAAQMD) and the Metropolitan Transportation Commission (MTC) administer the Bay Area Commuter Benefits Program, which requires employers with 50 or more full-time employees to provide commuter benefits in order to reduce GHG emissions and reduce vehicle miles traveled (VMT).

At the county level, the 511 Contra Costa program provides commuting incentives and information aimed at reducing traffic congestion and enhancing air quality. This program provides financial support to a diverse portfolio of transit, bicycle, micro-mobility modes, carpooling, and vanpooling programs throughout the county.

San Ramon's TDM Program was established in 1989 and is guided by the Transportation Demand Management Advisory Committee. This committee is comprised of representatives of local businesses and provides a unique opportunity for private companies to contribute to the reduction of employment-related and home-based vehicle trips. Some of the services the Program provides include the coordination of employer and public agency TDM efforts, hosting commuter fair events to promote commute alternatives, and supporting the annual Bay Area Bike to Work Day event.

Local employers and businesses are doing their part as well. San Ramon's largest business park, Bishop Ranch, provides a robust menu of transportation options for the approximately 30,000 employees who work there, including BART shuttle service to Dublin and Walnut Creek BART stations, direct connections to the Pleasanton ACE station, express bus service to San Francisco, and dockless bikeshare.

# Emerging Changes in Transportation

## Transportation Planning and Investment

Shifts in transportation planning are occurring that tend to support development and transportation-related improvements which encourage more residents, workers, and visitors to walk, bike, or use transit. Building on the best practices for enhancing multi-modal environments, an increased focus on complete streets aims to serve all modes of travel safely and effectively. Overall, a balanced investment in vehicle, bicycle, pedestrian, and transit infrastructure should include a goal to serve all modes of travel equally, ensuring all travelers, regardless of ability, income level, and travel origins and destinations, have equitable mobility options.

## Innovations

New technologies and trends are constantly emerging and transforming the way we use and think about our transportation networks. Transportation Network Companies (e.g., Lyft and Uber), micro-mobility (bike share and scooter share companies), and autonomous vehicles are just a few examples of transportation innovations that are causing planners to ask new questions and develop new strategies for how we plan for the transportation network of the future.

## Effects of COVID-19 on Travel Behavior

Travel patterns have significantly changed as a result of the COVID-19 Pandemic, which began in March of 2020. Prior to the pandemic, approximately 8 percent of working-age Californians lived in households where at least one adult teleworked. Since the COVID-19 pandemic began, approximately 40 percent of adult Californian workers and over half of workers in the San Francisco Bay Area substituted in-person work for telework. Additional effects of the COVID-19 pandemic include significant reductions in bus, rail, and ride-share trips, as well as a significant increase in e-commerce and online shopping. This shift in traditional habits, decreased the number of daily trips typically seen prior to the pandemic.  As the pandemic wanes and we move toward a post-COVID "normal," traveler behavior will adjust in ways that are difficult to predict. However, a desire for flexibility with regard to in-person workplaces is one characteristic that appears likely to endure.

# Mobility Assets in San Ramon

San Ramon's central location within the Tri-Valley area provides excellent access to surrounding cities and communities, as well as to other parts of the San Francisco Bay Area. While the suburban setting lends itself to automobiles as a preferred mode of travel, the City's bicycle, pedestrian, and transit facilities help make these alternative modes of transportation viable choices as well.

San Ramon's Transit Center connects residents, workers, and patrons to local and regional transit services. The Bay Area Rapid Transit (BART) system, which provides commuter rail service to the greater San Francisco Bay Area, has two stations located to the south of the City in Dublin/Pleasanton, and the Walnut Creek station to the north, with bus connections to San Ramon provided by County Connection. The Altamont Corridor Express (ACE) system provides commuter rail services between San Joaquin, Alameda, and Santa Clara Counties, and has a station in Pleasanton with express bus service to Bishop Ranch.

The Iron Horse Trail serves bicyclists, pedestrians, and equestrians, providing access to commercial and residential areas, schools, public transportation, and other community facilities throughout central San Ramon. The trail connects San Ramon to communities to the north and south, and to other regional trails such as the Contra Costa Canal Trail in Pleasant Hill and Walnut Creek.

# Mobility Challenges in San Ramon

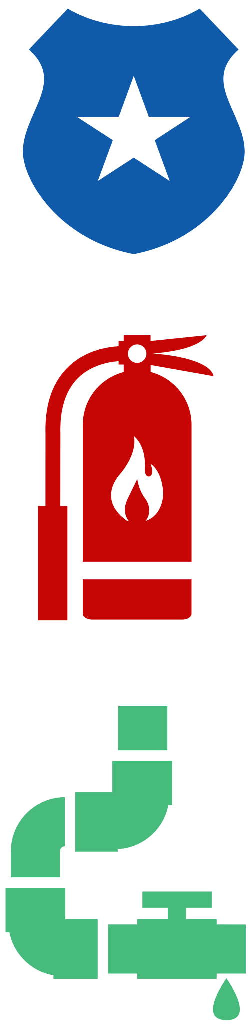
The following issues present challenges and opportunities for improvement during the development of the General Plan update:

- **Commute Period Congestion** – Like virtually all communities in the Bay Area, San Ramon has congested roadways during peak commute hours. Sections of arterials like Crow Canyon Road and Bollinger Canyon Road, and some I-680 interchange areas, operate near capacity during the AM and/or PM peak periods. In most cases, adding lanes is infeasible and would not likely resolve congestion over the long term, so transportation planners look to operational efficiency improvements and other innovations to manage congestion and match travel demand to available capacity.
- **Pass-Through Traffic** – Some of San Ramon's arterials serve traffic passing through San Ramon. Many of these trips are appropriately using the City's roadways, which connect to neighboring communities including Pleasanton, Dublin, Danville, Castro Valley, and Hayward. Others are trips that would prefer to use I-680 but divert to City roadways to avoid congestion. The challenge is to maintain an efficiently operating roadway network while discouraging diverted regional trips that belong on the freeway network.
- **School Area Congestion** – Most school areas experience congestion around bell times, and San Ramon's schools are no exception. Congestion is worsened when access routes and driveways are limited. Steps that can reduce congestion include increasing ridership on TRAFFIX school buses and other bus routes, encouraging walking and bicycling through well-identified safe routes to school, better drop-off/pick-up circulation, and other tailored school site measures that target the individual site's opportunities for reducing auto traffic.
- **Pedestrian Network Gaps** – Many residential and collector streets have discontinuous sidewalks, making it difficult to safely walk from point A to point B. As adjacent parcels develop or redevelop, the City typically requires sidewalk improvements. However, where redevelopment is unlikely in the near-term, a prioritized plan for addressing these gaps in the network is needed.


PLAN
SAN RAMON
31

# 7. PUBLIC FACILITIES, SERVICES, AND INFRASTRUCTURE

*Public facilities and services contribute to the quality of life, health, and safety of a community. As a city grows and develops, expansion of and equal access to adequate services such as police, fire protection, and utilities are necessary to insure the well-being of all residents. A key component of the General Plan Update is anticipating the changing needs of a city. This section provides an overview of San Ramon public facilities, services, and infrastructure.*



# Overview of Public Services

**Electrical Services.** Electrical services in San Ramon are provided by PG&E, although Marin Clean Energy (MCE) offers a green energy option to San Ramon residents. MCE's parent company, Marin Energy Authority, buys electricity through PG&E. PG&E distributes the electricity, reads the meters, and manages customer service and billing. MCE is a not-for-profit public energy provider that gives customers the option of having 50 percent to 100 percent of their electricity supplied from clean, renewable sources. Wind, solar, bioenergy, hydro and geothermal are offered to promote and support new State and local renewable energy generation goals.

**Wastewater.** Central Contra Costa Sanitary District (CCCSD) provides wastewater collection, treatment, and disposal services to San Ramon. CCCSD also provides household hazardous waste disposal service. Dublin San Ramon Services District (DSRSD) provides wastewater and recycled water services to the southern portion of the City of San Ramon, City of Dublin, and the Dougherty Valley. East Bay Municipal Utility District (EBMUD) provides a recycled water program to San Ramon.

**Solid Waste.** Alameda County Industries of San Ramon (ACI) is the franchised hauler for solid waste, recyclables, and organics for the City. Services include collection of all commercial, industrial, and residential solid waste. ACI services include recycling, hazardous/electronic waste collection, and construction waste.

**Water.** East Bay Municipal Utility District (EBMUD) provides water to most of San Ramon, with DSRSD providing water to the Dougherty Valley section of the City. EBMUD Recycled Water Program uses highly treated wastewater that is safe for a variety of non-potable use, including irrigating parks, schoolyards, golf courses, cooling towers, and toilet flushing in commercial and multi-family residential buildings. (EBMUD) connected its recycled water system to Canyon Lakes Golf Course in San Ramon saving hundreds of thousands of gallons a day, enough water for 6,000 residents.

**Storm Drainage.** The City of San Ramon Public Works Department manages the San Ramon stormwater drainage system. The City has adopted a Stormwater Management Plan with programs and strategies for long-term management of stormwater in the City. A key element of stormwater management in the City is the National Pollution Discharge Elimination System (NPDES) program which is intended to reduce stormwater pollutants before they enter waterways. The City is responsible for field inspections (storm drain systems, creeks, and illicit conditions), holding educational and outreach activities (information presentations, attending public events and coordinating storm drain stenciling), storm drain cleaning, scheduled street sweeping, and conducting new development and redevelopment of stormwater controls.

**Communications.** Phone, internet, and cable are provided by AT&T, Comcast, Direct TV, DISH, Earthlink, Exede, HughesNet, Nextiva, Verizon, Viasat to residents of San Ramon.

**Natural Gas.** Natural gas service is provided by PG&E.

## City Government

San Ramon was incorporated in 1983 and is located approximately 35 miles east of San Francisco in the San Ramon Valley of Contra Costa County. The City operates with a council-manager form of government. The City Council is comprised of four Council members elected by district who serve four-year overlapping terms and a Mayor elected for a two-year term. The City Council serves as the Board of Directors of the San Ramon Public Financing Authority, the Geological Hazard Abatement Districts, the Redevelopment Successor Agency, and the San Ramon Housing Authority. Council Members also represent the City on the governing boards of numerous Joint Power Authorities. The City Council appoints the City Manager and the City Attorney. The City has six departments consisting of general government, administrative services, community development, public works, parks and community services, and police. General government includes City Council, City Manager, City Clerk, and City Attorney. Administrative Services includes finance, human resources, and information technology. Community development includes building, planning, and economic development. Public works includes engineering, transportation, and maintenance. San Ramon has over 250 employees.

## Law Enforcement

The San Ramon Police Department has two bureaus. The Operations Bureau and the Support Services Bureau. The Operations Bureau consists of the Patrol Division, Traffic Division, and Youth Resources Division. The Support Services Bureau includes the Investigation Division, Community Relations and Crime Prevention Division, Professional Standards and Training Division, and Records Division. The Department has 70 sworn officers (one chief, two captains, five lieutenants, 10 sergeants, nine corporals, six detectives, 31 patrol officers, four traffic officers, two K-9 officers), 19 professional staff members, and over 40 volunteers. The Patrol Division is the largest division in the San Ramon Police Department. This division is made up of uniformed officers in patrol, traffic, and K9s.

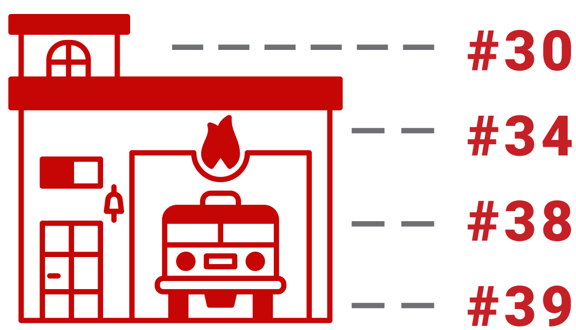
### Did You Know?

The Department provides numerous community programs and services, such as Citizens Police Academy, Neighborhood Watch, Ride Along, Chaplains, Police Explorers, Station Tours, Volunteers, and the Youth Academy.

# Fire Protection and Emergency Medical Response

The San Ramon Fire District and the Danville Fire District merged in 1980 to create the San Ramon Valley Fire Protection District. The District provides fire protection, rescue, and emergency medical services to the City of San Ramon, as well as the communities of Alamo, Blackhawk, the Town of Danville, Diablo, the southern area of Morgan Territory, and the Tassajara Valley, all located in Contra Costa County. The District's service area encompasses approximately 155 square miles, serves a population of 192,858, and has approximately 185 personnel. The District has nine fire stations. The District also operates a 911 dispatch center, a tactical training site, an essential services warehouse and various ancillary facilities including a communications building and several radio towers. There are four fire stations within the San Ramon City limits (stations 30, 34, 38, 39) and one administration building. The Fire Chief oversees the general operations of the district guided by the policy direction of a fie-member Board of Directors.

The City is currently in the process of developing a new Public Safety Building Complex located at 2401 Crow Canyon Road. The complex is proposed to house both the San Ramon Police Department and San Ramon Valley Fire Protection District.




# Healthcare

The San Ramon Regional Medical Center is the largest healthcare facility in San Ramon and has served the City for 30 years. The hospital is a 123-bed facility. They provide comprehensive inpatient, outpatient, and emergency care. The facilities include a family birthing center, outpatient surgery center, breast center, infusion center, diagnostic imaging center, advanced wound center which houses a hyperbaric oxygen therapy program, and a surgery center. Also provided are heart care programs, joint and spine treatment programs including advanced and minimally invasive surgical treatments, a Level 2 special care nursery, minimally invasive and robotic surgery, and pediatric services. San Ramon Regional Medical Center became the first hospital in the Bay Area to offer robotic-assisted spine surgery. It also offers a blood conservation program, which is unique to the region, and joint replacements. San Ramon also has numerous specialty medical offices, clinics, and home healthcare services.

Another major healthcare facility in San Ramon is the Sutter/ San Ramon Center, which is part of the Palo Alto Medical Foundation and offers a large variety of services such as birth centers, emergency rooms, imaging, surgery centers, urgent care, walk-in care, behavioral health, cancer services, family medicine, orthopedics, pregnancy, and primary care to name some of the many health services.

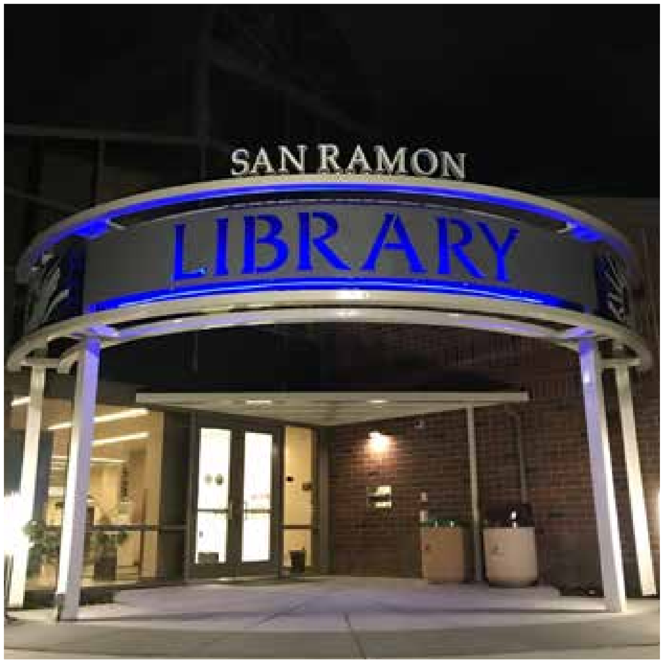
# Education

San Ramon's schools are part of the San Ramon Valley Unified School District (SRVUSD). SRVUSD covers an 18 square mile area, encompassing the communities of Alamo, Blackhawk, Danville, Diablo, and San Ramon (including the new Dougherty Valley communities in east San Ramon), as well as a small portion of the cities of Walnut Creek and Pleasanton. The District is comprised of 36 schools serving more than 32,000 students in transitional kindergarten through grade 12. San Ramon has two high schools, four middle schools, eleven elementary schools and one independent study school. Over 94 percent of SRVUSD graduating seniors attend college or university, far exceeding state averages with acceptance into University of California and the California State University systems.

# Libraries

San Ramon has two County operated libraries, the San Ramon Library, and the Dougherty Station Library. The San Ramon Library has a teen area, a large children's area with separate story room, and provides public access computers and free wireless access. The Dougherty Station Library is an 11,600 square foot building that has access to new technology, a computer lab, study rooms, 44 computers for public use, and free wireless internet access. The library also has a special seating area and a community room for library programs. Additionally, the Diablo Valley College San Ramon Campus has a library that is open to the public.

Support from the San Ramon Library Foundation provides programs for adults, teens, and children for the two County operated libraries and the Diablo Valley College library.





# PLAN SAN RAMON

General Plan • Housing Element • Climate Action Plan

# 8. OPEN SPACE, PARKS, AND RECREATION

*Parks and open space provide signature community areas to a city, make neighborhoods more attractive, offer a place for natural habitat and wildlife, and bring environmental, social, cultural, and economic benefits to a city and its residents. Recreational activities benefit physical and mental health while strengthening a community's identity. This Open Space, Parks, and Recreation section outlines existing open space, parks, recreation facilities and opportunities, and access conditions in San Ramon.*

# Open Space

Open spaces, natural habitats, rolling hills, creeks, and canyons define the City's distinct character. The protection and conservation of these scenic surroundings are integral to the natural resources of the City and the quality of life of the community. There are 3,500-acres of land designated as open space within the City limits, which includes the undeveloped hills and ridges that surround the City.

Natural vegetation in the San Ramon area includes the dominant non-native grassland, scattered oak savannahs comprised of mostly deciduous oak, live oak woodlands, denser oak woodlands, and riparian habitat in combination with arroyo willow riparian forest. Chaparral or scrub vegetation occurs on dry south- and west-facing slopes and along openings in oak woodland at higher elevations. Freshwater emergent vegetation in and around standing water and seeps are found throughout the area.

Four special-status plant species are known to occur in San Ramon, including Congdon’s tar plant, Diablo helianthella, Mt. Diablo buckwheat, and San Joaquin spearscale. Fifteen special-status wildlife species have been recorded as occurring within the San Ramon planning area, including Alameda whip snake, , California linderiella, California red-legged frog, California tiger salamander, San Joaquin kit fox, Burrowing owl, Ferruginous hawk, Golden eagle, Northern harrier, Prairie falcon, Tricolored blackbird, and Western Pond turtle.

# Parks, Trails, Open Space, and Recreation Master Plan

The San Ramon Parks, Trails, Open Space, and Recreational Master Plan was approved by the San Ramon City Council on June 22, 2020. The Plan is a long-term guide to determine the needs, growth trends, and opportunities for Parks and Recreation in San Ramon. The vision statement is “San Ramon creates community through people, parks, partnerships, and programs.” Some of the ideas presented through the Guiding Principles are:

- Improve and expand interconnected trails
- Create connectivity to parks and open spaces
- Conservation and connection to nature
- Promote a balance of recreational activities
- Take care of natural resources and provide access to open space and natural areas
- Encourage the use of San Ramon’s parks, open spaces, trails facilities, and programs
- As the community diversifies, communication, trends, and programs must adapt for all ages, cultures, and abilities
- Create positive recreational experiences

Some opportunities presented are:

- Enhance the Iron Horse Trail
- Develop a plan for a walking district near the City Center
- Provide facilities and programming that connect people to nature
- Increase use of sustainable maintenance practices
- Develop Park amenities and events that promote wellness and community connectedness to reduce isolation and relieve stress
- Use technology to increase park use and participation in recreation programs
- Accommodate the demand for sports field use

The City of San Ramon owns 169 acres of open space lands, and East Bay Regional Parks District (EBRPB) owns 7,245 acres of nearby regional public lands. The Bridges Golf Club and Homeowners Association owned and maintained recreation areas, and other private protected lands combine for a total 1,264 acres of active open space.

# Trails

The Iron Horse trail is a flat, paved, and wheelchair accessible 4.24-mile trail that runs through the length of the City, with many access points throughout the City. The trail is used for walking, running, biking, equestrian use, and leashed dog walking. The trail runs through residential, commercial, schools, parks, transportation, regional trails, and community facilities. Iron Horse Trail is part of the East Bay Regional Park District's Iron Horse Regional Trail.

The City of San Ramon has:

- 46 miles of public trails
- 18 miles of access roads used for recreation
- 14 miles of non-City trails

# Parks

San Ramon has 57 parks that are an important component of the City's unique landscape and its neighborhoods, offering walking and biking trails, picnic areas, sports venues, playgrounds, dog parks, public gardens, historic identifiers, and many unique open spaces to promote recreation for all ages, and community fellowship. The San Ramon Parks and Community Services Department is responsible for maintaining the City's Park system. Parks are classified into six categories:

- **Neighborhood Parks** – Developed to serve the needs of single neighborhoods and residents living within a half-mile of the park, which is at least 2 acres.
- **School Parks** – Developed, improved, and maintained on school grounds with the specific purpose to serve students and nearby residents.
- **Community Parks** – A larger park or facility that serves a broad area of the City, typically six to sixty acres area in size.
- **Regional Parks** –Regional parks are typically over 200-acres in size and include land and water bodies. They serve residents within a thirty-minute drive.
- **Specialized Recreation areas** – Devoted for a specific activity. Examples include a dog park, sports park, or public garden. San Ramon aims to maintain 2 acres of Community parks and Specialized Recreation Areas per 1,000 residents.
- **Public Spaces** – Enhances the recreation or leisure interactive experience of residents or visitors for active or passive use. Examples include picnic areas, plazas, trails, water elements, pocket parks, and sports fields like basketball or tennis courts.

# Public Art

San Ramon places a high value on public art and as such requires new construction projects or significant remodels to include public art in the design or pay into a Public Art Fee. The City currently has over 50 pieces of public art on both City property and privately owned property that are accessible to the public. In addition, the City maintains five indoor art gallery spaces in public buildings with rotating exhibits from local artists.

*Iron House by Martin Metal*

*Sundance II by Roger Barr*

**TABLE 8-1: SAN RAMON PARKS**

| SAN RAMON PARKS | |
|---|---|
| **PARKS** | **DESCRIPTION** |
| **Alcosta Senior & Community Center Park & Gardens** | Adjacent to the Alcosta Senior Center is a 6.25-acre park that includes a gazebo, picnic areas, restrooms, bocce courts, horseshoe pits, game tables, a walking path, and community gardens. |
| **Amarante Park** | A 1.5 acre linear park with paved pathways and grassy areas. |
| **Arlington Park** | A 4.10-acre park with a playground with a children's maze, parking, restrooms, picnic area, baseball/softball field, and a soccer field. |
| **Athan Downs Community Park** | A 20-acre community park named after the City founder, mayor, and City Manager, Byron Athan. This Park has public art, parking, restrooms, trail access, a reservable picnic area, four baseball/softball fields, four soccer and other use fields, a half basketball court, four lighted tennis courts, and an accessible playground. |
| **Bark and Ride** | A 6.88-acre park that serves as a park and ride area accompanied with a dog park and trail access. |
| **Bella Vista Elementary School Park** | A 7.40-acre park available for community use outside of school hours. It has trail access, restrooms, a baseball/softball field, and a multi-use soccer field. |
| **Belingham Square Park** | A 4-acre neighborhood Park that contains a gazebo, playground, picnic area, volleyball court, restrooms, a horseshoe pit, and street parking. |
| **Bollinger Canyon Elementary School Park** | A 4.5-acre Park that is available for the community outside of school hours with a playground, 2 baseball/softball fields, a multi-use soccer field, a picnic area, with restrooms and parking. |
| **Boone Acres** | Boone Acres is one of San Ramon's oldest neighborhood parks. It is 6 acres with a grassy meadow and many mature shade trees. The park has a picnic area, volleyball court, horseshoe pit, a track, a playground with restrooms and street parking. |
| **Centennial Park** | A 5.25-acre hillside park with mature shade trees, a play structure, picnic area, trail access, restrooms, and parking. |
| **Central Park** | A 40.8-acre community park with fields, grassy areas, picnic tables, a playground, soccer field, tennis courts, a basketball court, volleyball court, a baseball/softball field, trail access, and restrooms. |
| **Compass Point Park** | A 1.4-acre park in the hills with a large decorative compass and treehouse playground area with swings, and trail access. |
| **Country Club School Park** | A 7.11-acre joint-use park available to the community outside of school hours with picnic tables, a playground, soccer field, baseball field, basketball court, and volleyball court. |

### TABLE 8-1: SAN RAMON PARKS (CONT.)

| SAN RAMON PARKS | |
|---|---|
| **PARKS** | **DESCRIPTION** |
| **County Fair Park** | A 18-acre park with picnic tables and a playground. |
| **Coyote Creek School Park** | A 5.25-acre joint-use park available for the community outside of school hours, with a baseball/softball field, soccer field, trail access, a playground, picnic tables, and restrooms. |
| **Coyote Crossing Park** | An 11.73-acre, hillside neighborhood park with shade trees, a large grass area, views of the hills and Mt. Diablo with a playground, picnic area with barbecues, a baseball/softball field, soccer field, tennis court, restrooms, and parking. |
| **Creekside Park** | A 5.97-acre park with grassy open areas, a play structure surrounded by mature shady trees. Paved walking trail around the park with a soccer field, picnic area, basketball court, and restrooms. |
| **Crow Canyon Gardens** | A 7.46-acre park and nature area with restrooms. |
| **Del Mar Dog Park** | A 1.21-acre dog park with a wide-open enclosed dog run area. |
| **East Branch Park** | A 5.07-acre neighborhood park with a picnic area, a playground, trail access, basketball court, soccer field, a baseball/softball field, and restrooms. |
| **Firetruck Park** | A 1.1-acre park with a firetruck-inspired play structure and playground, tall, mature trees, a picnic area, and a large open grass area. |
| **Gale Ranch Middle School Park** | A joint-use 15-acre park available for the community outside of school hours with a volleyball court, baseball/softball field, soccer field, basketball court, trail access, and restrooms. |
| **Golden View Elementary School Park** | A joint-use 4-acre school park available to the community outside of school hours with a baseball/softball field, soccer field, basketball court, and playground. |
| **Hidden Crest Park** | A 2.34-acre park with picnic area and playground in a grassy area. |
| **Hidden Hills Elementary School Park** | A joint-use 2.96-acre park available to the community after school hours with a baseball/softball field, soccer field, basketball court, and restrooms. |
| **Hidden Valley Park** | A 4-acre park with a playground and picnic area, open space, a baseball/softball field, soccer field, picnic area, and restrooms. |
| **Hummingbird Playground** | A .04-acre park with a playground and picnic area. |
| **Inverness Park** | A 5.83-acre neighborhood park with plenty of open space. |

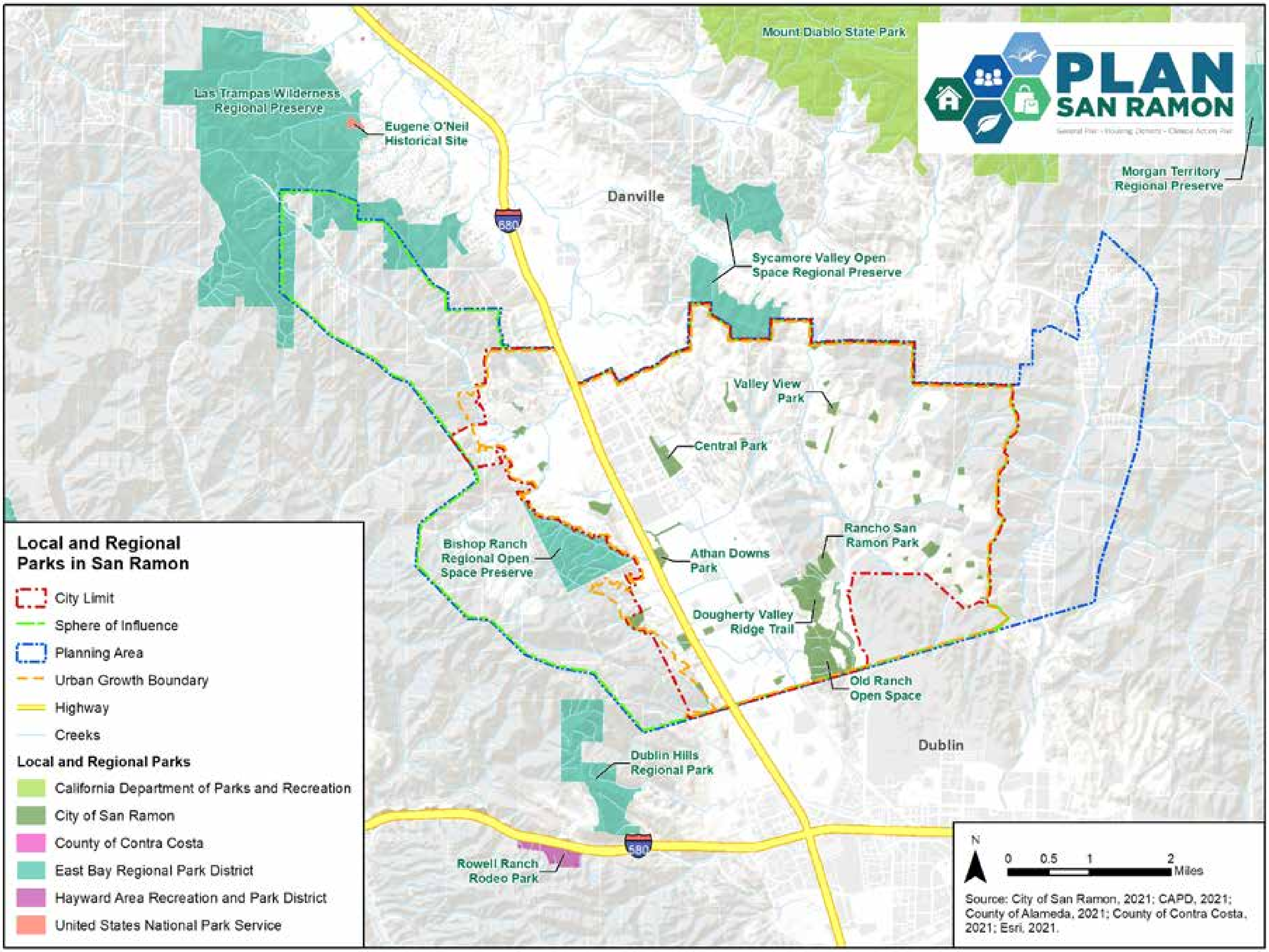
### TABLE 8-1: SAN RAMON PARKS (CONT.)

| SAN RAMON PARKS | |
|---|---|
| **PARKS** | **DESCRIPTION** |
| **Iron Horse Middle School Park/ Community Gym** | This joint-use acre park is available to the community outside of school hours offering a volleyball court, baseball/softball field, soccer field, basketball court, trail access, and restrooms. |
| **Limerick Park** | A 2.76-acre park with a play structure, picnic area, and a large grass field, basketball court, trail access, and restrooms. |
| **Live oak Elementary School Park** | A joint-use 1.5-acre park, available to the community outside of school hours with a soccer field, a playground, trail access, and restrooms. |
| **Memorial Park** | A 16.3-acre park dedicated to the fallen victims and heroes of 9/11 with a bocce ball court, baseball/softball field, playground, picnic area, dog park, and restrooms. |
| **Mill Creek Hollow** | A 4-acre park with grassy areas, picnic tables and surrounded by mature trees with a playground and restrooms. |
| **Monarch Park** | A 6.34-acre park with views of the hills, a large grassy area with space to run and play, a soccer field, playground, picnic area, and restrooms. |
| **Montevideo Elementary School Park** | A joint-use 3.68-acre park available to the community outside of school hours with a baseball/softball field, basketball court, soccer field, trail access, and a playground. |
| **Mosaic Park** | A 1.61-acre Park with a playground, shaded picnic area, and large grassy area. |
| **Neil Armstrong Elementary School Park** | A joint-use 4.17-acre park, available outside school hours to the community with a baseball/softball field, basketball court, soccer field, a playground, and trail access. |
| **Old Ranch Park** | A 6.73-acre park with views of the hills, a lush green field, a baseball/ softball field, basketball court, soccer field, a playground, picnic area, and restrooms. |
| **Piccadilly Square** | A 4.14-acre park with a large field, a walking loop around the park with a baseball/softball field, soccer field, basketball court, playground, picnic area, and restrooms. |
| **Pine Valley Middle School Park/ Community Gym** | A joint-use 9.35-acre park is available for community use and rental outside of school hours with a baseball/softball field, basketball court, and soccer field. |
| **Quail Run Elementary School Park** | A joint-use 6.49-acre park available for community use outside of school hours with a baseball/softball field, soccer field, playground, and restrooms. |
| **Ramona Park** | A 4.08-acre park with a gazebo, grassy areas, a wooden play structure, Bocce ball, a picnic area that can be reserved, and restrooms. |

### TABLE 8-1: SAN RAMON PARKS (CONT.)

| SAN RAMON PARKS | |
|---|---|
| **PARKS** | **DESCRIPTION** |
| **Rancho San Ramon Community Park** | A 22.89-acre park with a splash pad and lighted fields. The Park includes a soccer field, a baseball/softball field, tennis courts, a picnic area, playground, and restrooms. Phase 2 of the park is a 8.2 acre park currently under construction featuring lit-basketball courts, bocce ball courts, picnic areas and other recreational amenities. |
| **Red Willow Park** | A 4.94-acre park with views of Mt. Diablo, grassy areas, picnic tables, a soccer field, baseball/softball field, playground, trail access, and restrooms. |
| **Richard Fahey Village Green Park** | A 4.35-acre park with a soccer field, baseball/softball field, trail access, a playground, picnic area with a large grassy area, and restrooms. |
| **San Ramon Sports Park** | A 14.8-acre park with lighted fields for groups to use with rental options. Includes a soccer field, baseball/softball field, basketball court, trail access, a picnic area, and restrooms. |
| **Sherwood Park** | A 1.49-acre park with a playground and picnic area. |
| **Six Pillars Park** | A 2.74-acre park with a large grassy area, basketball court, trail access, a playground, picnic area, and restrooms. |
| **Souyen Park** | A 2.4-acre park with a serene environment, a play structure and playground for young children, bocce ball, a tennis court, trail access, picnic area, and restrooms. |
| **Summit View Trail Park** | A 13.49-acre park with trail access and beautiful sunset views. |
| **Tassajara Ridge Staging Area** | A 1.03-acre wide open dog park with trail access and restrooms. |
| **Twin Creeks Elementary School Park** | A joint-use 3.66-acre school park, available for community use outside of school hours with a baseball/softball field, basketball court, soccer field, and playground. |
| **Valley View Park** | A 10.01-acre park with rentable picnic sections, a soccer field, baseball/softball field, tennis court, playground, and restrooms. |
| **Walt Disney Elementary School** | A joint-use 4.72-acre park available for the community outside of school hours with a baseball/softball field, basketball court, soccer field, trail access, a playground, and picnic tables. |
| **Windemere Ranch School Park** | A 9-acre park with baseball fields, cricket pitch, and soccer field. |
| **Windy Hills Park** | A 1.36-acre park with a large grassy area and mature shade trees with a playground and picnic area. |

**FIGURE 8-1: LOCAL AND REGIONAL PARKS IN SAN RAMON**



# Recreation

The Parks and Community Services Department is committed to creating unique and balanced recreational activity opportunities to the community of San Ramon. Every season, the City of San Ramon publishes a Parks and Community Services Guide highlighting local performances, parks, facilities, classes such as Aqua aerobics, swim lessons, lifeguard training, and events like the Art and Wind Festival, Fitness Races, the Scarecrow Scavenger Hunt, Fourth of July Concerts, Multicultural Community Celebration, Summer Concerts, Foreign Film Series, Winter Break Camps, Holiday on the Farm, Oktoberfest, San Ramon Performing Arts, and much more.

# Community Facilities

San Ramon offers a range of unique and versatile community facilities for many events, including community centers, San Ramon City Hall, joint-use community gymnasiums, performing arts center and theatre, aquatic centers, an indoor-outdoor community center/park, and a historic farm/ public park, and museum.

**TABLE 8-2: SAN RAMON FACILITIES**

| SAN RAMON FACILITIES | |
|---|---|
| **FACILITIES** | **DESCRIPTION** |
| **Alcosta Senior & Community Center** | A center geared towards active seniors but serves the entire community in the evenings and weekends. It features a park with tables and benches, a gazebo, and plenty of grass to seat guests or to play on. Also has a variety of rooms to host nearly any event. |
| **Amador Rancho Center** | A new community center and venue located at the Rancho San Ramon Community Park for holding meetings, parties, birthdays, or any other event. |
| **Iron Horse Gymnasium/Pine Valley Gymnasium** | The City of San Ramon has two joint-use community gyms that are used during the daytime of the school season for middle school P.E. programs. Community use is weekdays after school hours, on weekends during the school year, and seven days a week during the summer months. The gyms are equipped with adjustable basketball hoops, volleyball nets, badminton nets and scoreboards. Individual courts are available and are separated by a screen divider. |
| **Dougherty Station Community Center** | This Center has an arts focus with the a 90 seat theater (Front Row Theater), art studio space with a kiln, Dance Studio, Gallery space as well as large gathering room, classrooms, and an instructional Kitchen. |
| **Dougherty Valley Aquatic Center** | An aquatic center available by reservation for pool space, team practices, next meet, tournament, or special event. The facility has a 50-meter pool, play structure pool, diving boards, and picnic areas. |
| **Dougherty Valley Performing Arts Center** | A modern performing arts theatre with 587 seats with professional lighting and sound capabilities. The center also has a 3,500 square foot rehearsal room, dressing rooms, inflatable water course, and box office. |
| **Forest Home Farms Historic Park** | This facility includes two venues: the Glass House Garden, a fully restored 1877 Victorian Glass House; and the Walnut Barn, a historic three-sided barn with rustic appeal. The facility is used for picnics and as a wedding venue. |
| **San Ramon Community Center at Central Park** | The venue offers indoor and outdoor spaces along with Central Park. Several rooms are available, as well as a two-story art gallery. |
| **San Ramon Olympic Pool & Aquatic Center** | This facility includes a 50-meter pool, 25-yard pool, play structure pool, inflatable water course, diving boards, and picnic areas. |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# 9. ENVIRONMENT

*The Environment section describes the existing conditions related to the environmental resources and sustainability in San Ramon. This section includes water quality and supply, air quality, biological and cultural resources, and noise.*

## Water Resources

The City of San Ramon is serviced by the East Bay Municipal Utility District (EBMUD) and Dublin San Ramon Services District (DSRSD). DSRSD provides potable and recycled water services as well as wastewater collection and treatment to the Dougherty Valley area of the City of San Ramon, whereas EBMUD provides water services to the rest of the City. EBMUD's primary source of water comes from outside the Bay Area in the Mokelumne River watershed located on the western slope of the Sierra Nevada Mountains. Additionally, approximately 10 percent comes from the East Bay watersheds and is stored in local reservoirs within EBMUD's service area prior to treatment, including Briones, Chabot, Lafayette, San Pablo, and Upper San Leandro (USL). The East Bay watersheds are illustrated in Figure 9-1. East Bay water resources depend on the overall water conditions of the regional watersheds including streams, creeks, ground water, and precipitation, which all contribute water supply within the natural water systems that fill local reservoirs.

## Water Quality

EBMUD reported in their 2020 annual water quality report that the district consistently provided high-quality drinking water, meeting or surpassing every public health requirement set by the State Water Resources Control Board (State Water Board) and the U.S. Environmental Protection Agency (USEPA). DSRSD posted results for water quality in their 2020 annual water quality report and found that the water district meets, and in some cases exceeds, all state and federal drinking water requirements. Results for both service providers are posted annually in the Annual Water Quality Report from EBMUD and DSRSD.

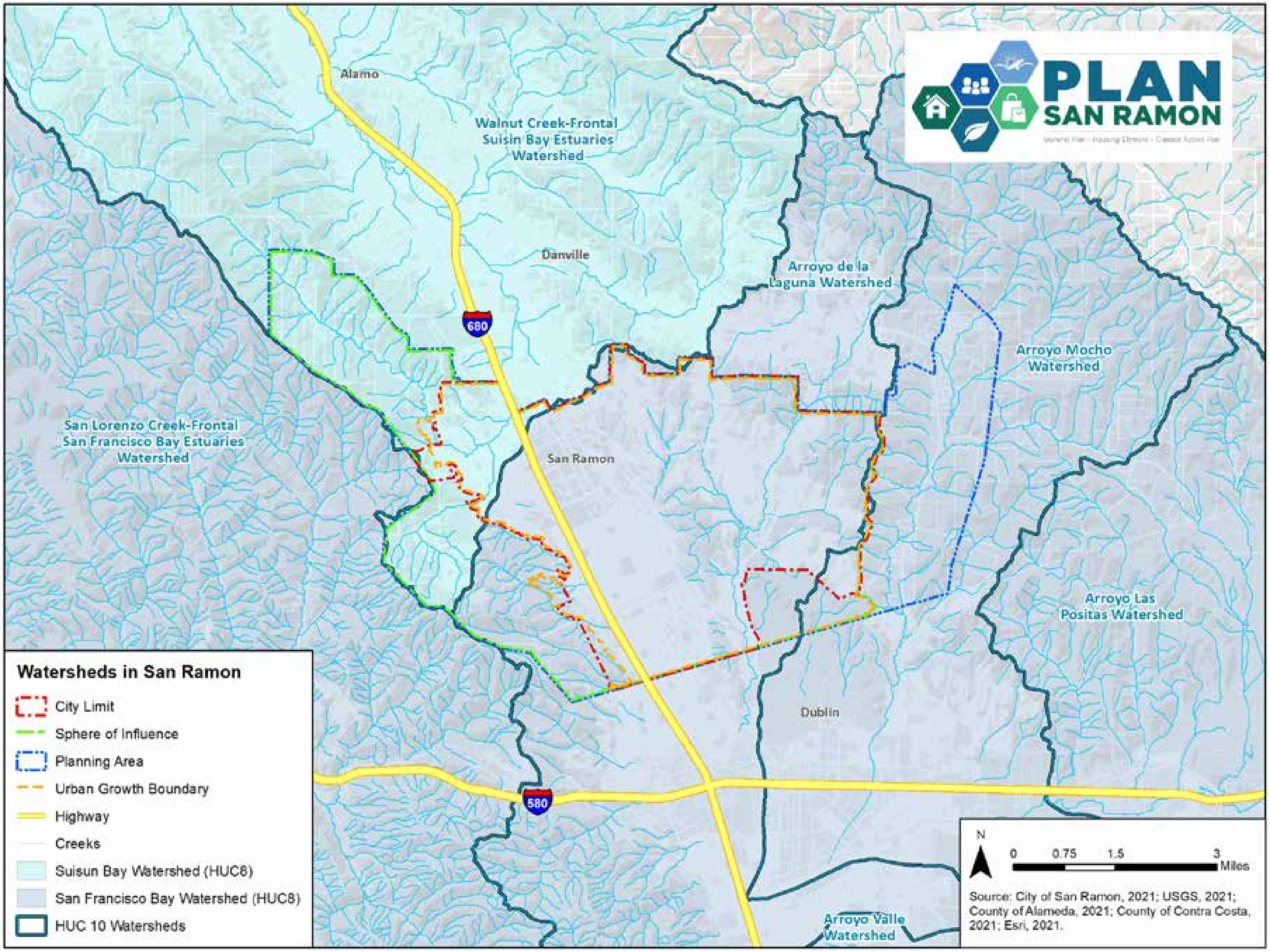
EBMUD

Dublin San Ramon Services District

*Water, wastewater, recycled water*

*Source: Photo retrieved from www.ebmud.com*

**FIGURE 9-1: WATERSHEDS IN SAN RAMON**

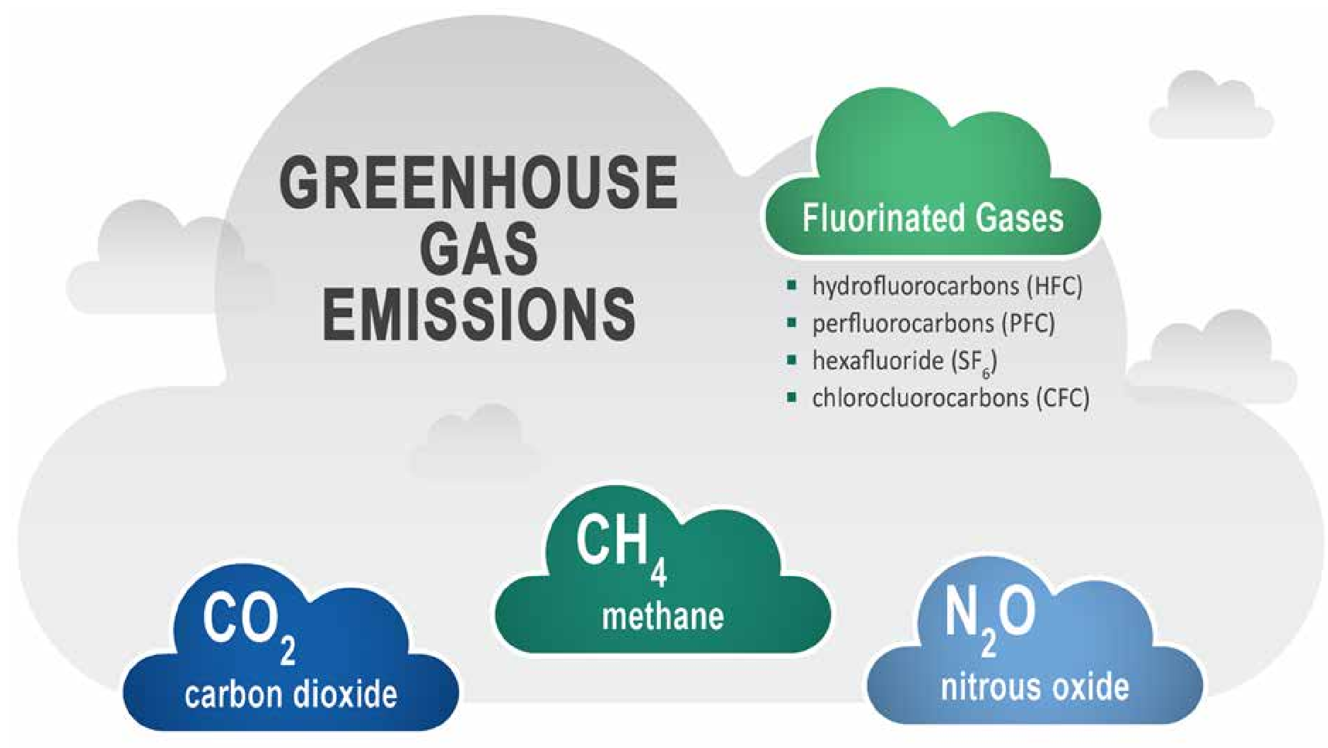


# Air Quality and GHG Emissions

San Ramon occasionally experiences poor air quality due to combined local and regional pollution, caused primarily by transportation-related emissions and pollution blowing in from the broader Bay Area to the west. While air quality has improved over the last 50 years, the City occasionally exceeds California and National Ambient Air Quality Standards for some air pollutants, particularly ozone and nitrogen dioxide. Generally, air quality is poorest during the summertime when ozone levels spike in the region.

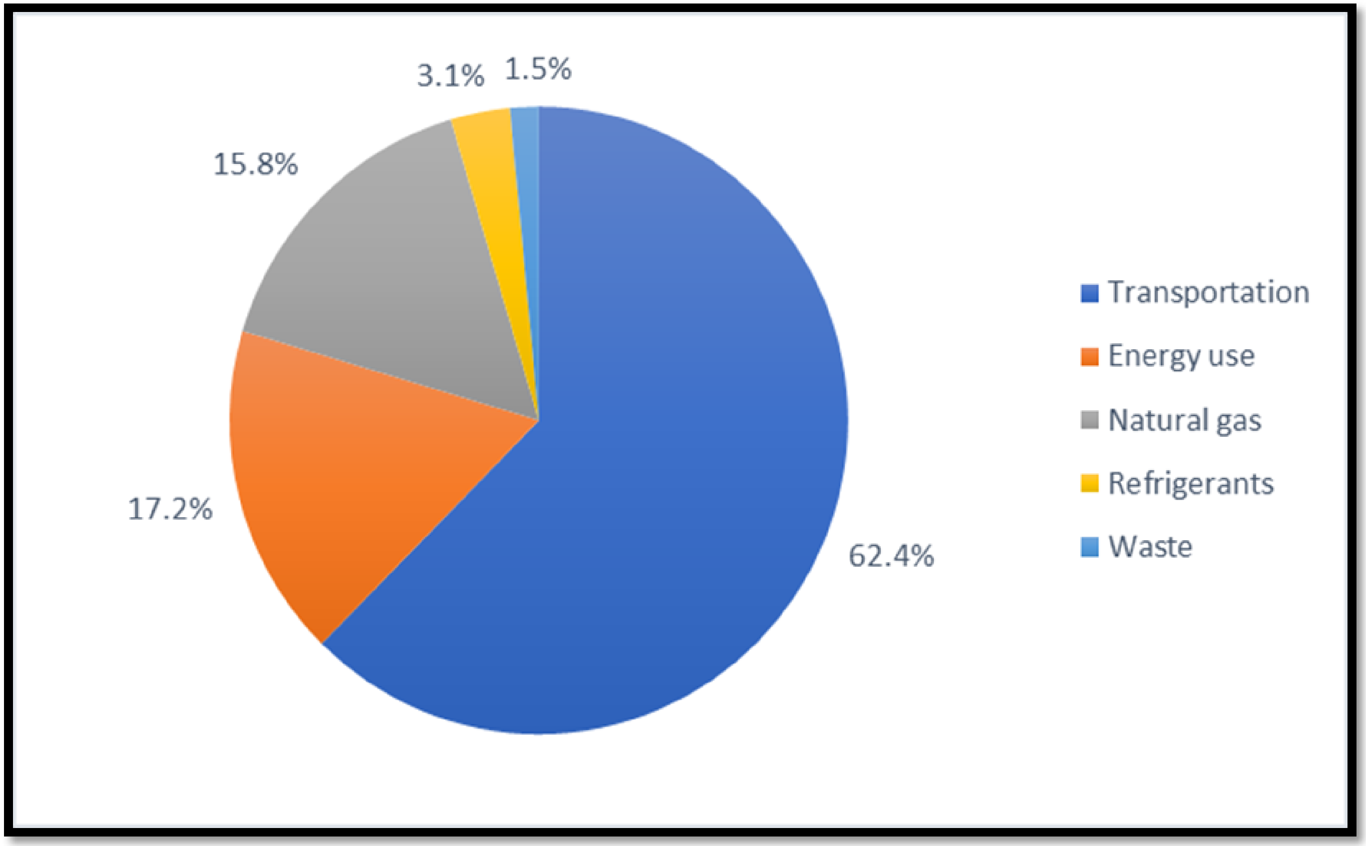
The adopted (2011) Climate Action Plan (CAP) will be updated as part of the overall General Plan Update effort for San Ramon. The CAP includes an inventory of greenhouse gas (GHG) emissions produced in San Ramon, including carbon dioxide (CO2), methane (CH4), nitrous oxide (N2O), and fluorinated gases including hexafluoride (SF6), hydrofluorocarbons (HFC), chlorofluorocarbons, and perfluorocarbons (PFC), which are illustrated in Figure 2 below. These emissions are standardized using the global warming potential in comparison to CO2, and is therefore referred to as “CO2 equivalent,” or CO2e. The GHG inventory is used to illustrate the emissions produced from the various activities in the City including transportation, energy, and waste.

**FIGURE 9-2: TYPES OF GREENHOUSE GAS EMISSIONS**



The City of San Ramon has two GHG emission inventories: community-wide emissions, and municipally produced emissions. The community-wide emissions inventory shows transportation, including automobiles, light duty trucks, and heavy diesel trucks, as the largest source of emissions, consisting of more than half of all emissions at 62.4 percent. Following transportation is energy use at 17.2 percent, natural gas use in buildings at 15.8 percent, refrigerants at 3.1 percent, and waste at 1.5 percent. The City was successful at reducing emissions to the target of 15 percent below 2008 levels in compliance with state targets outlined in AB 32.

**FIGURE 9-3: SAN RAMON 2020 COMMUNITY-WIDE EMISSIONS INVENTORY**




*Source: San Ramon Climate Action Plan (CAP), 2020.*

# Biological Resources

Biological resources in San Ramon include both special status species and natural resources.

## Habitat and Vegetation

The City of San Ramon has a mix of vegetation and habitat types. As shown in Figure 9-4, the Dougherty Valley area, located in the eastern half of the City, consists of low rolling hills with herbaceous and shrub habitat, mostly grasslands. The western portion of the City includes larger hills that make up the range that parallels the San Francisco Bay running north and south. The habitat consists of a mix of hardwood forest and oak woodlands, herbaceous grasslands, and pockets of shrub.

## Special Status Species

The City of San Ramon has native oak trees that are protected in an effort to preserve the area's biological resources and natural spaces. San Ramon's planning area includes habitat for special-status species. Special-status species are plant and animal species designated by federal or State regulatory agencies as needing special protection. Species with a "special-status" designation are warranted special consideration under the California Environmental Quality Act (CEQA). There are three special-status species that have historically been present and have habitat in San Ramon that require special consideration in the planning process: the Alameda whipsnake, California red-legged frog, and the California tiger salamander, as shown in Figure 9-5.

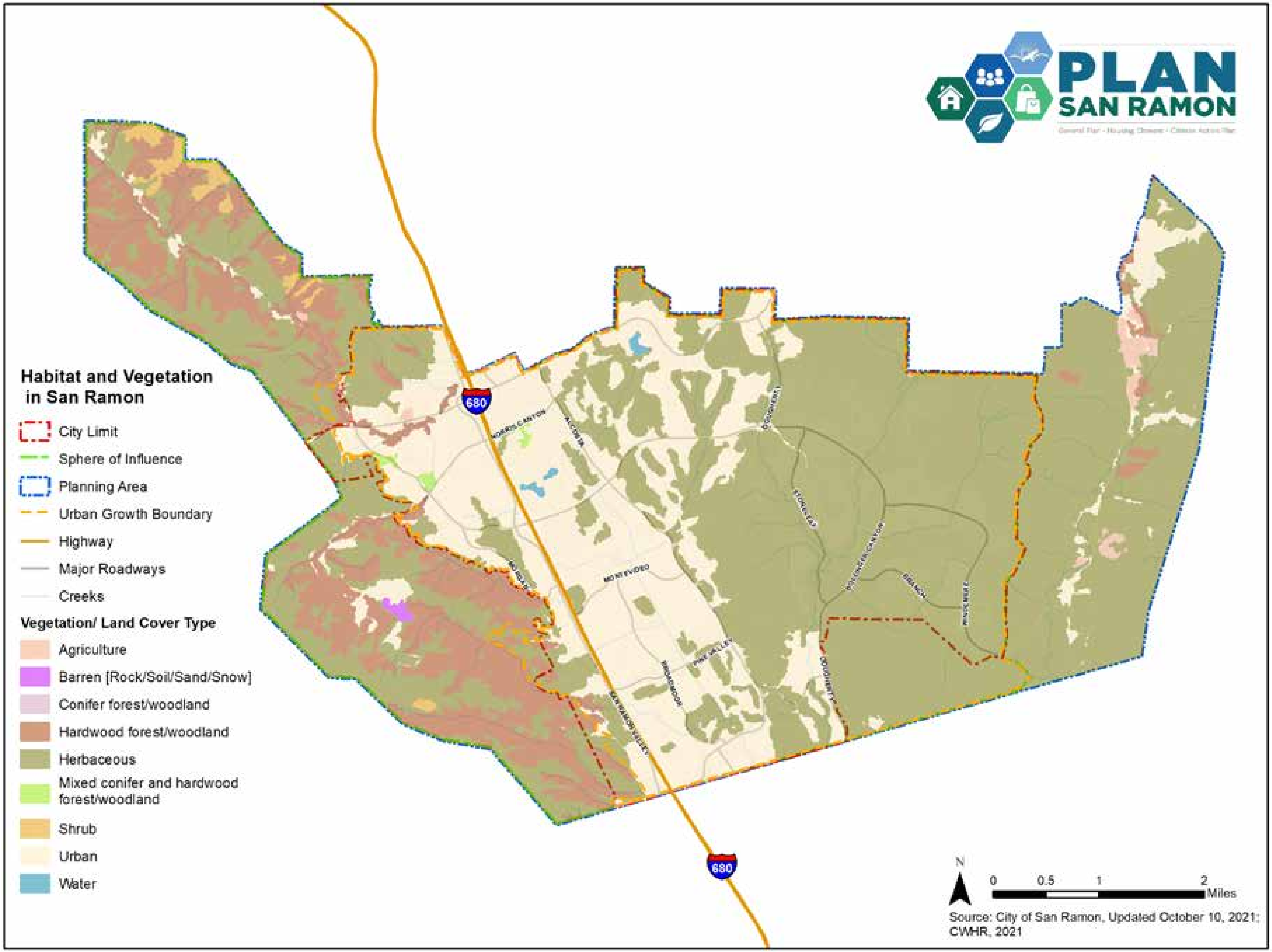
*Tessajara Ridge*

*Red-legged Frog*

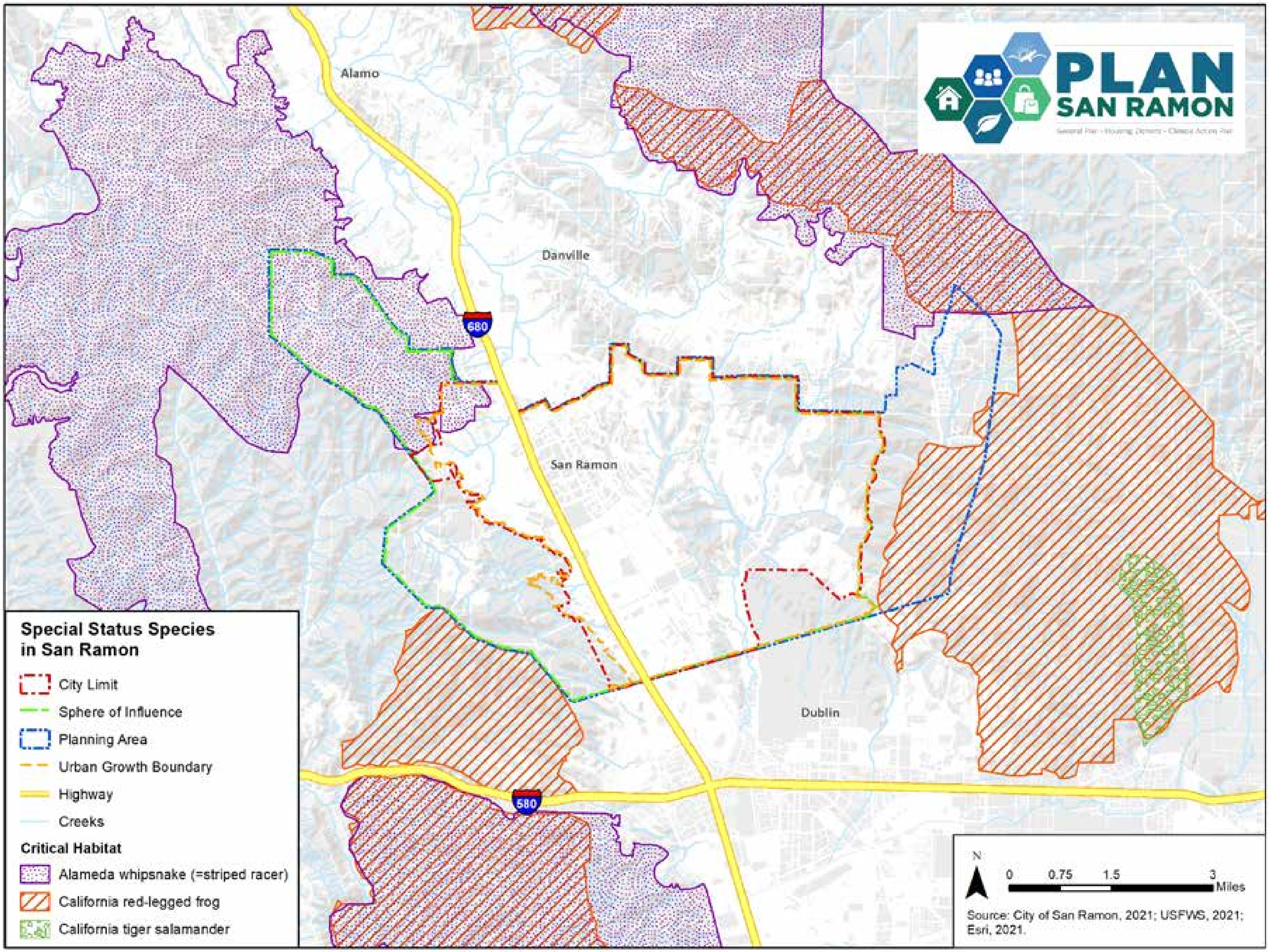
*California Tiger Salamander*

*Alameda Whipsnake*

**FIGURE 9-4: HABITAT AND VEGETATION IN SAN RAMON**



### FIGURE 9-5: SPECIAL STATUS SPECIES IN SAN RAMON



# Cultural Resources

San Ramon is situated within the traditional tribal territory of the Ohlone/Costanoan peoples. The Ohlone/Costanoan peoples, along with the Bay Miwok, consider the valley and Mt. Diablo (each tribe has its own name for Mt. Diablo) to be sacred. The City is home to several historic sites and buildings including the Forest Home Farms Historic Park and Boone Ranch. The San Ramon Historic Foundation is primarily involved in preserving historic structures in the City. Additionally, the San Ramon Valley Historical Society works to preserve and elevate the historic structures and sites in and around the City.

*Forest Home Farms Historic Park*

# Noise

Noise in San Ramon is primarily caused by traffic along major roadways. Interstate 680 (I-680) is a major highway connecting the south bay to the east bay and the central valley, carrying large volumes of vehicular traffic that produces noise in the immediate vicinity of the highway. Crow Canyon Road and Bollinger Canyon Road are also sources of noise, particularly where they connect to I-680 and in the commercial and retail areas.

In addition to traffic-related noise, construction activity is an ongoing source of noise in the City. San Ramon has several specific plan areas with active construction sites, including the Northwest Specific Plan, San Ramon Village Specific Plan, North Camino Ramon Specific Plan, Dougherty Valley Specific Plan, and the Westside Specific Plan. The City Center Bishop Ranch shopping center is being developed in the City center and the CityWalk Master Plan will having on-going projects over the next 20 to 30 years at the existing Bishop Campus. These projects will produce noise during construction activities that may have impacts on the local areas around the City.

*Interstate 680 (I-680)*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# 10. HAZARDS AND SAFETY

*Natural hazards in the San Ramon region are similar to those in the rest of the Bay Area. Earthquake, drought, and wildfire are the highest concerns in the region, with additional concerns centered around localized flooding and an increased number of high heat days.*

# Earthquake

Similar to the greater Bay Area, San Ramon is located in an area of high seismic activity and has a history of earthquakes impacting the City and its vicinity. The location of fault zones in and around San Ramon can be seen in Figure 10-1. There are four major faults that run through San Ramon: the Calaveras fault, Sherburne Hills thrust fault, Mount Diablo thrust fault, and Pleasanton fault. The Calaveras fault and the Pleasanton fault both run through the center of the City parallel to I-680. The Sherburne Hills thrust fault and the Mount Diablo thrust fault are in the eastern half of the City.

The Modified Mercalli Intensity scale (MMI) is used by the United States Geological Survey (USGS) to classify earthquake intensity by ground shaking severity. The severity level is determined by potential damage done to buildings and structures, the landscape, and the perception of shaking by people. In the event of a severe earthquake, the San Ramon residents will likely experience severe to violent shaking (VIII to IX on the MMI scale), as shown in Figure 10-2. The area of violent shaking potential runs along the I-680 corridor north and south and through downtown San Ramon, while the rest of the City is at risk of experiencing severe shaking. The scale and scope of actual damage caused from an earthquake in San Ramon is dependent on the intensity of the earthquake, the buildings and infrastructure involved, and the landscape characteristics.

Liquefaction occurs when seismic waves from an earthquake event move through granular soil, which is not as stable as the bedrock found in the hills and mountains around San Ramon. According to the USGS, liquefaction takes place when loosely packed, water-logged sediments at or near the ground surface lose their strength in response to strong ground shaking. Liquefaction occurring beneath buildings and other structures can cause major damage during earthquakes. San Ramon is situated within an area that is moderately to highly susceptible to liquefaction. The parts of the City running parallel to the I-680 corridor are most susceptible to liquefaction, as seen in Figure 10-3.

In the event of an earthquake, the Contra Costa County Hazard Mitigation Plan (HMP) shows that most of the critical facilities and infrastructure for San Ramon are located in areas with violent ground shaking potential and moderate to high liquefaction risk. Any earthquake event greater than 6.0 will likely have significant impacts throughout the region.

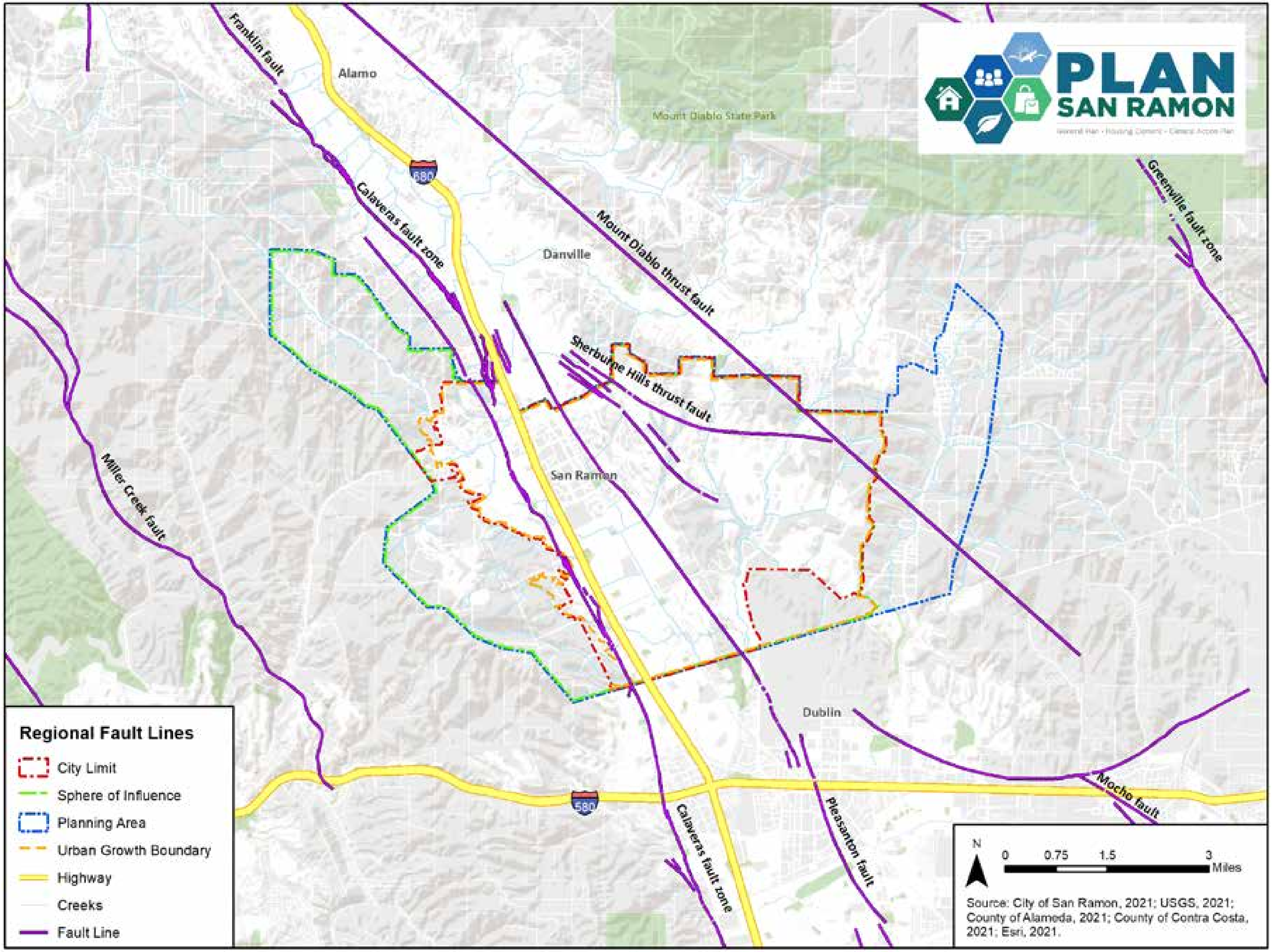


### WHAT IS THE MODIFIED MERCALLI INTENSITY SCALE (MMI)

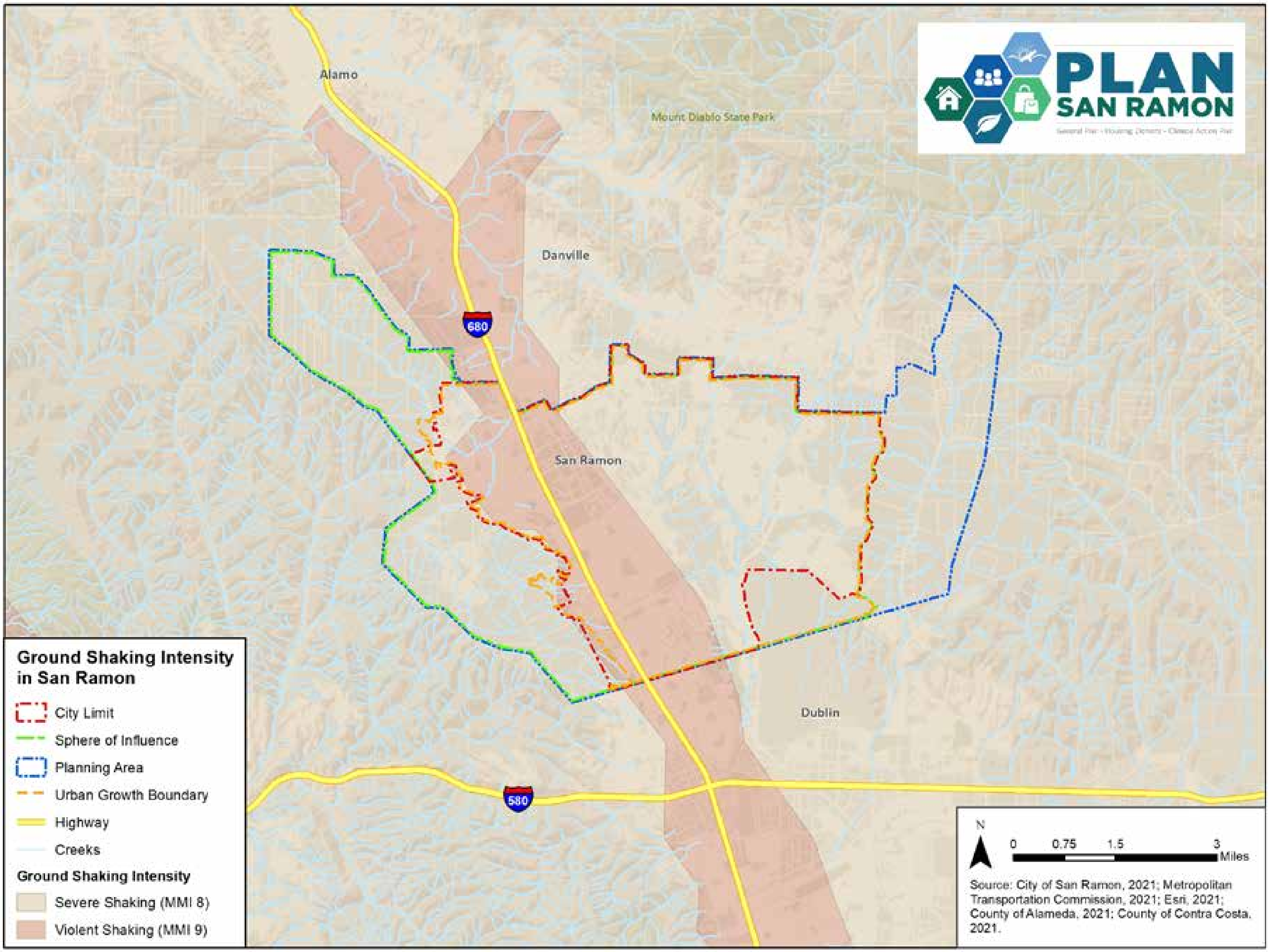
**MMI measures ground shaking severity at a given site according to damage done to structures, changes in earth surface and personal accounts.**

| MMI | Shaking |
|---|---|
| I | Not Felt |
| II-III | Weak |
| IV | Light |
| V | Moderate |
| VI | Strong |
| VII | Very Strong |
| VIII | Severe |
| IX | Violent |
| X, XI, XII | Extreme |

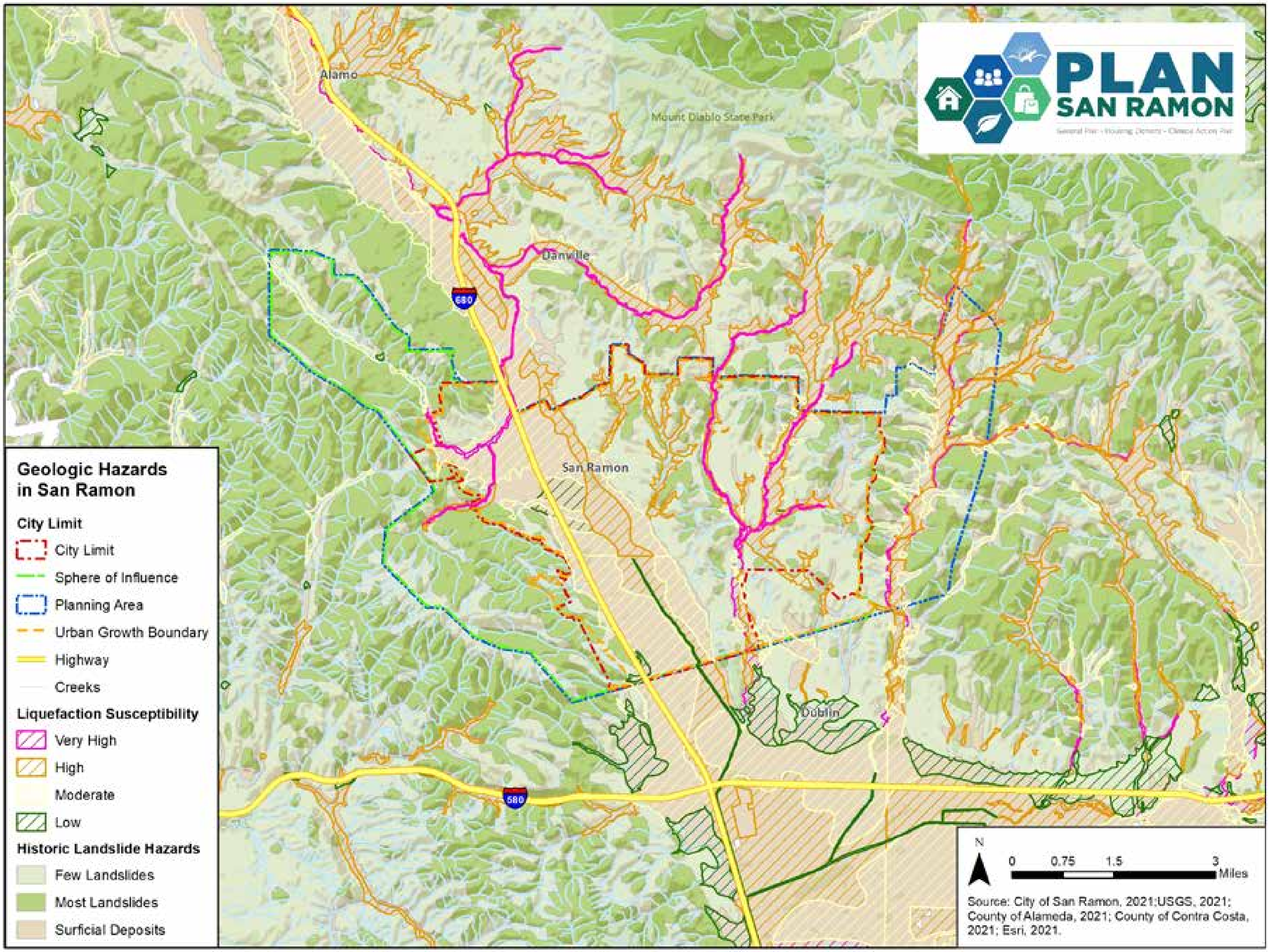
**FIGURE 10-1: FAULT ZONES IN THE SAN RAMON AREA**



## FIGURE 10-2: GROUND SHAKING INTENSITY IN SAN RAMON



## FIGURE 10-3: GEOLOGIC HAZARDS AND LIQUEFACTION SUSCEPTIBILITY IN SAN RAMON



# Climate Change

## Climate Change Impacts

California's climate is one of the most episodic in the country and climate change will make this variability more extreme. These changes are already being felt today within the last several years going from the worst drought period in the state's history from 2012 to 2016, to the wettest season on record from 2016 to 2017, then back to one of the worst droughts currently in the state this year (2021).

City of San Ramon residents are facing increased risks from existing hazards as a result of climate change. Each hazard will be impacted in a different way:

- **Temperature:** annual average temperatures will continue to increase at a faster rate.
- **Extreme heat:** there will be more extreme heat days, as a result of increasing temperatures, allowing more days to exceed the extreme heat threshold of 98.5 degrees Fahrenheit.
- **Precipitation:** annual average precipitation may not decrease much, but the variability from wet to dry will become more extreme with longer more intense dry and wet periods.
- **Wildfire:** the increasing temperatures, extreme heat days, and prolonged drought periods all increase the risk of wildfires occurring in and around San Ramon.
- **Flooding:** there will be an increase in the maximum precipitation potential in a single day that can increase the chance and frequency of flooding events in the FEMA flood zones and other localized areas prone to flooding.
- **Drought:** California has experienced its most extreme droughts in the last decade and that trend is likely to continue throughout the century with projections indicating longer and drier drought periods.

## San Ramon Climate Action Plan

The City of San Ramon adopted a Climate Action Plan (CAP) in 2011 with biennial reports reporting on progress made since adoption. The CAP provides a framework for the City to achieve targets set by State legislation including AB 32, which requires California to reduce statewide greenhouse gas (GHG) emissions to 1990 levels by the year 2020. The 2020 biennial report shows that the City was successful at achieving the target set by AB 32, as well as the City's target of 15 percent below the 2008 baseline by the year 2020.

The 2011 CAP describes climate change adaptation as efforts that respond to the impacts of climate change, such as adjustments in natural or human systems to actual or expected climate changes to minimize harm or take advantage of opportunities. Climate change will impact hazards in the area including:

- Increased wildfire risk in some areas because of combustibility of some building materials and vegetation, condition of access roads, and water supply changes
- Prolonged and intensified drought conditions that will reduce snowpack and rainfall impacting water supply
- Increase heat extremes with more extreme heat days

The CAP identifies strategies for adapting to these changes, including:

- Limit development beyond the urban growth boundary
- Expand recycled water service and direct new development to areas that can be served with recycled water
- Water conservation standards in new development
- Energy efficiency measures
- Low-impact development strategies

# Wildfire

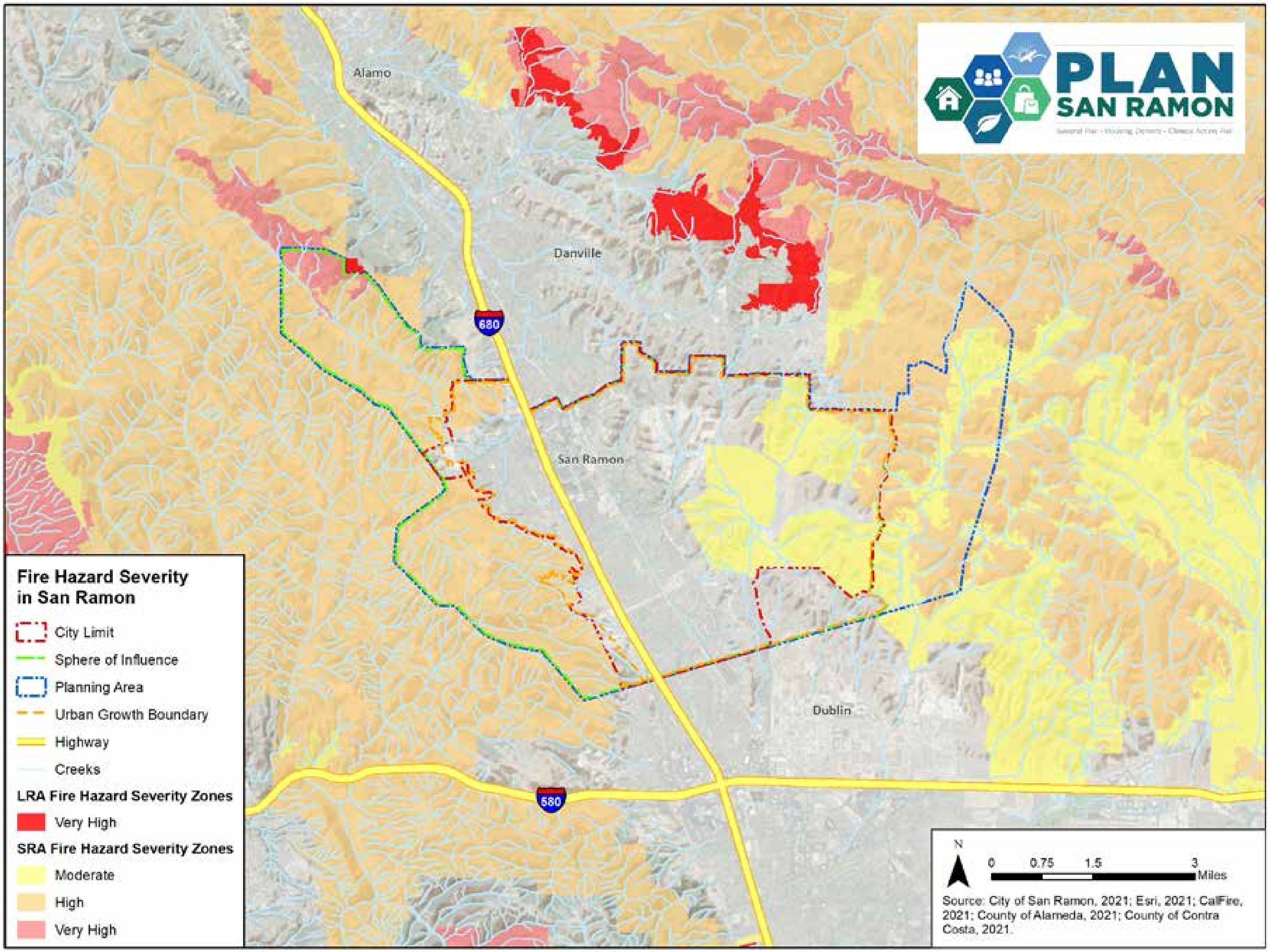
CAL FIRE is required to identify fire hazard severity statewide. Based on factors such as fuel, terrain, and weather, CALFIRE identifies Fire Hazard Severity Zones and assigns a responsibility area to either the State or local jurisdiction to be responsible for wildfire management. Fire hazards severity zones and responsibility areas are shown in Figure 10-4.

The City of San Ramon generally has moderate to high wildfire risk to the west and in the eastern portions of the City. Specifically, the Dougherty Valley Specific Plan area in the eastern portion of the City has approximately equal areas located in moderate and high wildfire severity zones, and the Westside Specific Plan is located completely within high wildfire severity. The rest of the City of San Ramon is rather urbanized and, therefore, not rated for wildfire risk but is still susceptible to fires moving from the wildland areas into developed areas. Historically, this region experiences wildfires every two to three years, but with drought conditions becoming prolonged and more severe, wildfires have occurred annually. Typically, the wildfires do not cause sufficient damage to trigger a Federal disaster declaration.

***The Collier Fire***

***The Collier Fire burned approximately 198 acres along Highland Road and Collier Canyon Road to the east of the City. The fire was extinguished within two days of when it started.***

FIGURE 10-4: FIRE HAZARD SEVERITY ZONES IN SAN RAMON

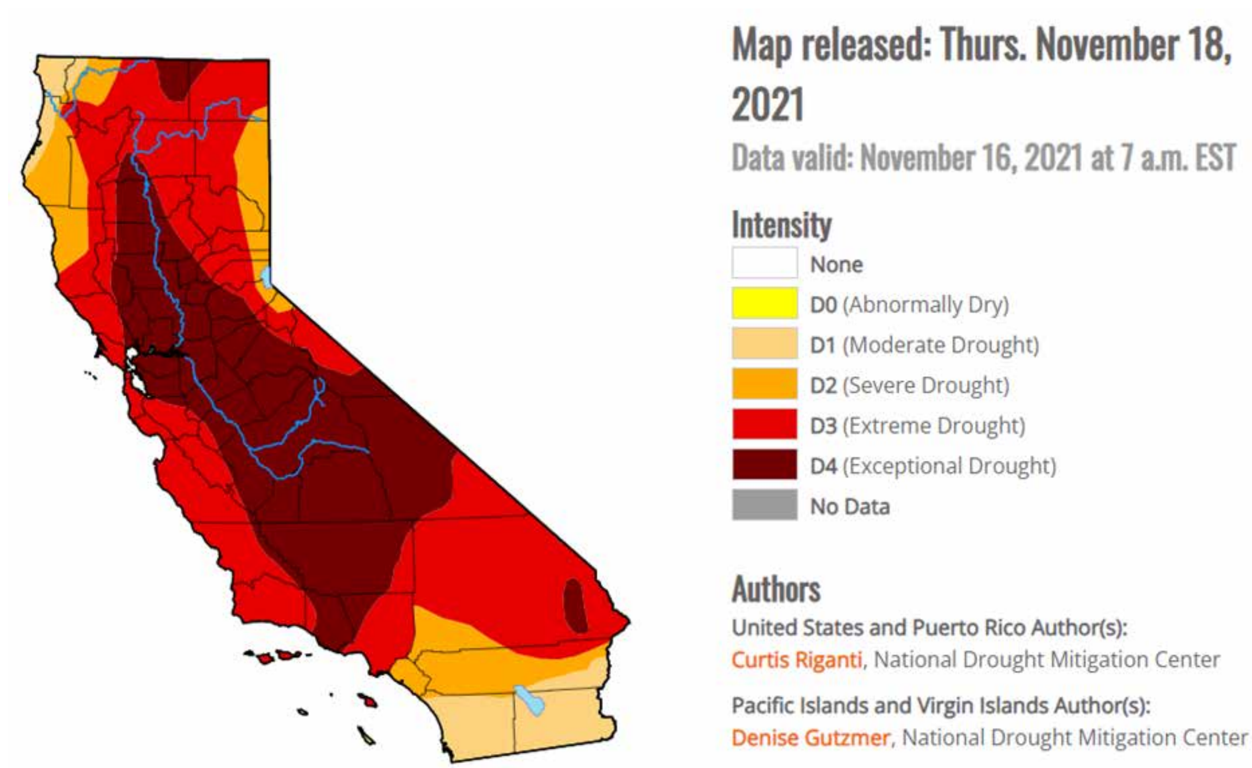


# Drought

Drought is the result of a prolonged period of water deficit. Drought is an increasingly common phenomenon for the state and Contra Costa County and has long-lasting implications for the City of San Ramon and the broader region. According to the U.S. Drought Monitor, as of November 18, 2021, Contra Costa County and San Ramon are within the highest drought severity level ("Exceptional") (see Figure 10-5). Precipitation projections for San Ramon show average annual precipitation decreasing from 24.1 inches to 20.3 inches over the next 20 years. The decline in snowfall in the Sierra Nevada Mountains will worsen the impacts of the reduced rainfall averages, as most of the area's water comes from the Sierra snowpack.

According to California's 4th Climate Change Assessment, drought conditions in the state between 2012 and 2016 led to the lowest Sierra Nevada snowpack on record, which in turn led to statewide surface water use reductions of 25 percent. The state of California was declared drought-free in 2019 only to dive back into drought conditions in 2021. As conditions persist, EBMUD and DSRSD have water shortage contingency plans to implement staged water use reductions.

**FIGURE 10-5: CALIFORNIA CURRENT DROUGHT CONDITIONS**



# Extreme Heat

Extreme heat events are becoming more frequent with climate change. An extreme heat event is defined by the Federal Emergency Management Agency (FEMA) as a long period (2-3 days) of high heat and humidity with temperatures above 90 degrees. Extreme heat poses a public health threat to vulnerable communities including seniors, those with respiratory concerns, and other sensitive groups. According to Cal-Adapt, San Ramon experiences on average five extreme heat days each year. Cal Adapts projections show the number of extreme heat days substantially increasing over the next 20 years to an average of 14 extreme heat days each year.

# Flooding

A 100-year floodplain has a 1 percent chance each year of experiencing a flood in any given year, while a 500-year floodplain has a 0.2 percent chance in any given year. The 100-year and 500-year floodplains in San Ramon are located along the stretch of Coyote Creek near California High School, as seen in Figure 10-7. Localized flooding may occur in other parts of the City, but do not pose a significant threat to developed areas.

# Adaptation and Resiliency Efforts in San Ramon

The City of San Ramon uses several planning and emergency operations documents including the Contra Costa County Hazard Mitigation Plan, land use controls, and emergency preparedness and response efforts to keep residents safe in the event of a disaster. The City works collaboratively with the Contra Costa County to provided plans of action for emergency response.

Adaptation and resiliency efforts in San Ramon include:

- Participation in the Contra Costa County Hazard Mitigation Plan
- Family Disaster Plan for residents to prepare for future emergencies
- General Plan measures for water conservation in times of drought
- Proactive SRVFPD measures to train to conduct controlled burns
- Disaster Supplies Calendar that provides information on what supplies are needed for residents to prepare for emergencies
- Participation in a Joint Powers Agreement (JPA) Citizens Corps Council program that provides an annual emergency preparedness community fair
- Community Emergency Response Team (CERT) program, which conducts regular trainings for residents and businesses.

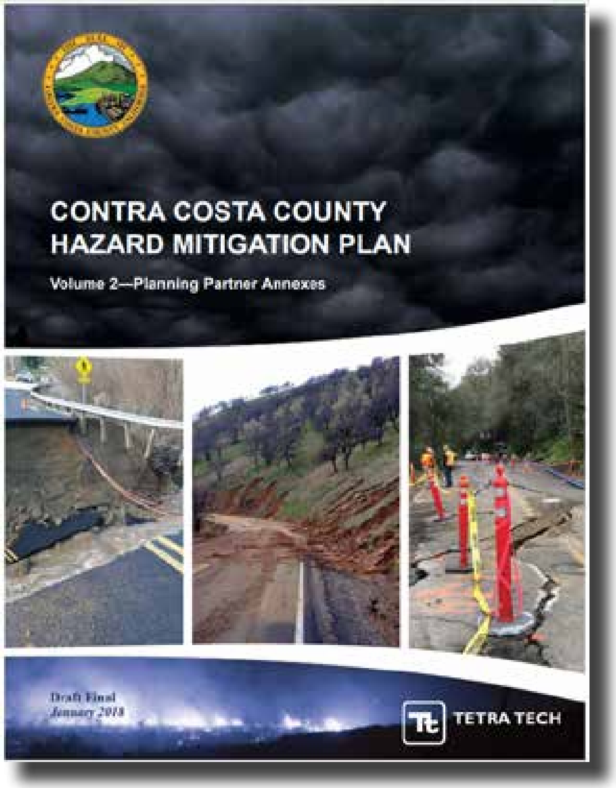
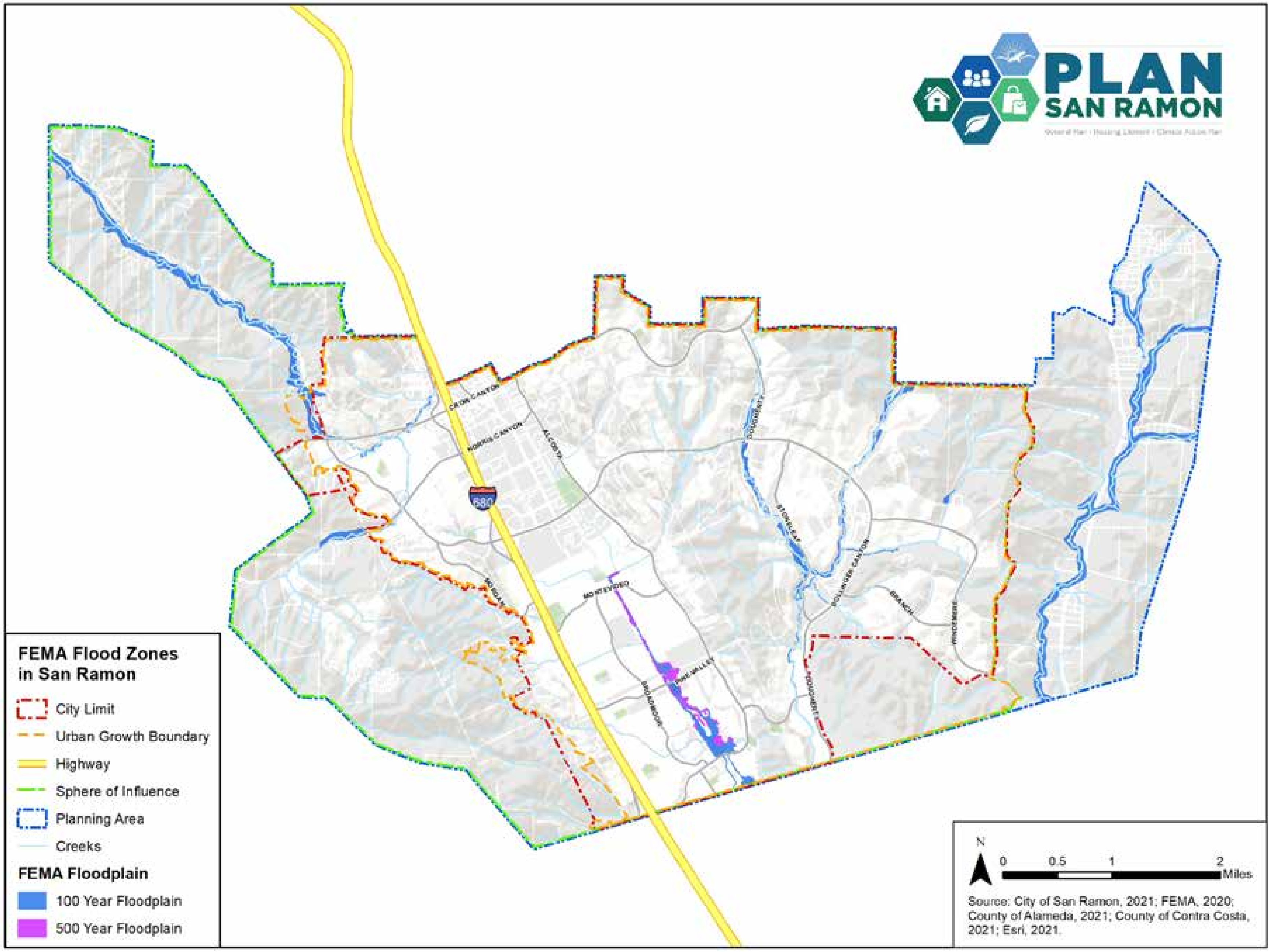


**FIGURE 10-6: FEMA FLOOD ZONES IN SAN RAMON**

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# A. MARKET CONDITIONS AND DEMAND PROJECTIONS

# SAN RAMON: MARKET CONDITIONS AND DEMAND PROJECTIONS FOR RETAIL, OFFICE AND INDUSTRIAL DEVELOPMENT

Prepared for: **City of San Ramon, California**

**February 22, 2022**


**PREPARED BY:**

THE NATELSON DALE GROUP, INC.
YORBA LINDA, CA • www.natelsondale.com
O: 714.692.9596 • F: 714.692.9597

# Table of Contents

# I. Introduction and Executive Summary

This report addresses market conditions and demand projections for retail, office, industrial and hotel development. A subsequent work product (to be prepared later in the General Plan Update process) will include housing demand projections, as well as a pro forma financial analysis as an additional means of screening development feasibility (and identifying land use polices that can maximize the City's development potentials).

Chapter 2 focuses on retail, Chapter 3 on office and industrial space, and Chapter 4 on hotel development. All uses are discussed in terms of their regional context as well as expectations for San Ramon specifically. Retail opportunities are initially reviewed with respect to the entire Interstate 680 corridor from Pleasanton (and including Livermore) north to the Bay. Future retail development opportunities in San Ramon are described through a detailed retail demand and supply modeling process, and in terms of the potential effects of a mix of countervailing market factors, including the following:

- Global trends within the retail industry (negative influence)
- San Ramon's substantial existing "leakage" of resident retail demand (potentially a positive factor)
- Modest projected population growth (generally a constraining factor)
- Expected evolution of Bishop Ranch (potentially a positive factor)
- Long-term stagnation in the hotel market (i.e., no new development for nearly 20 years), which has been further impacted by the COVID-19 (with hotel occupancy levels and associated tax revenue still well below their pre-pandemic peaks)

While retail development in and around San Ramon is relatively mature, office and industrial development is still evolving, and currently driven by firms, and also workers, moving eastward from the high-cost Silicon Valley area. This movement has been spurred on by the pandemic, which has consequently created a particularly dynamic market situation at present.

Table I-1 summarizes the current conditions and long-term demand/development opportunities in San Ramon that are discussed in greater detail in this document.

TABLE I-1. SUMMARY OF LONG-TERM DEMAND/DEVELOPMENT OPPORTUNITIES IN SAN RAMON

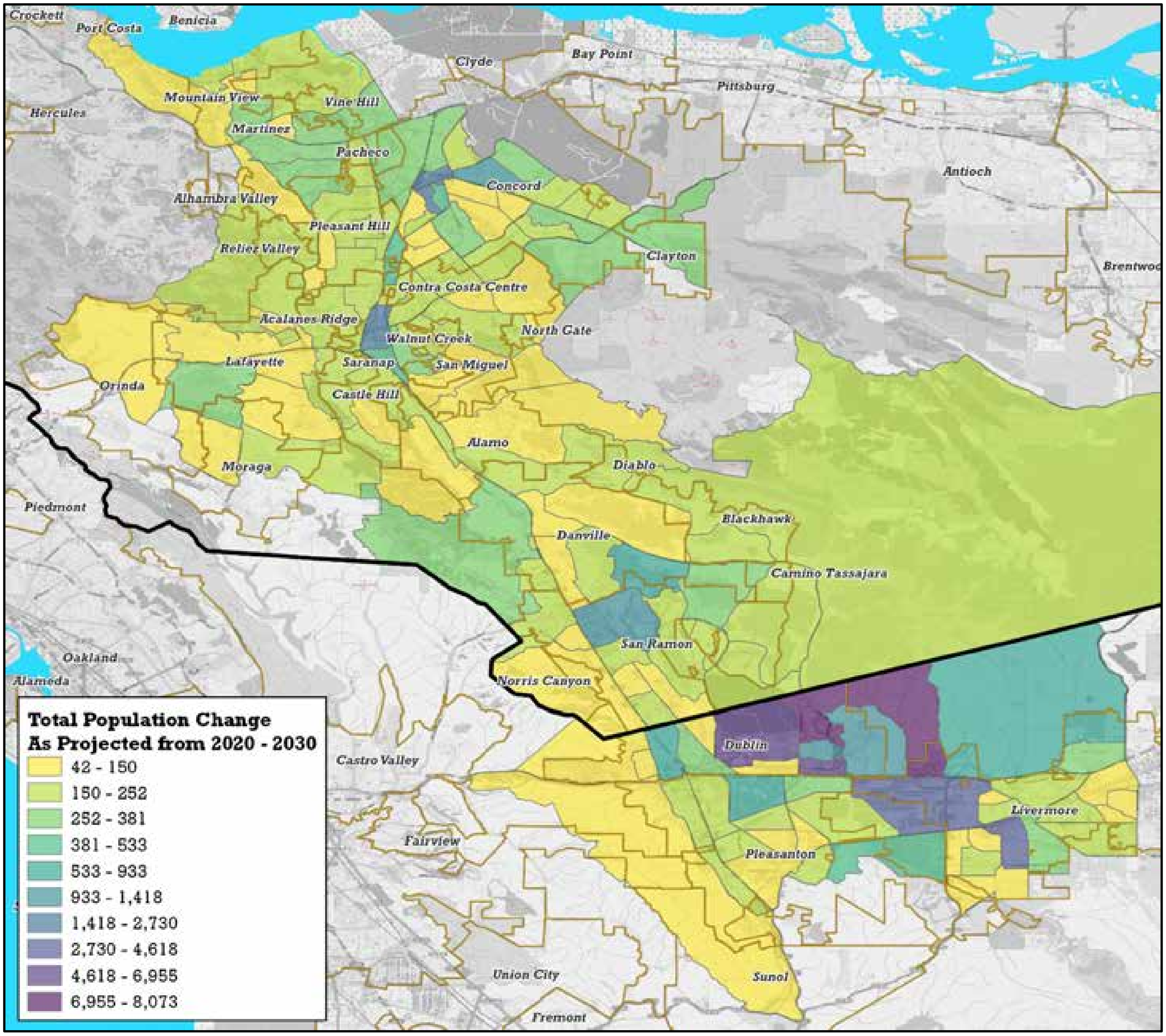
| Land Use | Existing Inventory/ Vacancy Rate | Potential Future Demand based on Optimizing Opportunities (Net New Space through 2040) | Nature of Projected Development Opportunities |
|---|---|---|---|
| Retail | 2.7 million SF (5.5% vacant)<br><br>San Ramon currently accounts for 8.7% of the total East Bay retail inventory | 1,100,000 square feet to 1,800,000 square feet<br><br>Range of estimated future demand is based on considerations described in the right-hand column. | • Incremental demand incidental to population growth<br>• Potential recapture of a portion of San Ramon's existing/substantial leakage<br>• Creation of mixed-use village areas (e.g., within Bishop Ranch) that can remain viable in a "post brick-and-mortar" retail world |
| Office | 9.5 million SF (15.8% vacant)<br><br>San Ramon currently accounts for 12% of the total East Bay office inventory | Based on current market trends (high office vacancy levels throughout Bay Area, slow/uncertain return of remote workers to former workplaces, and office rent levels that fall far short of supporting the cost of new office construction), foreseeable demand for new office development is likely to be minimal for at least 10 years (especially for "speculative" office spaced not tied to a specific large tenant/user).<br><br>For long-term planning purposes, San Ramon might expect to attract **500,000 to 750,000 square feet** of new office space by 2040. | • San Ramon's potential for major office development over the next 20 years will likely require a "game changer" such as the attraction of large anchor tenants<br>• Related to the above, San Ramon can potentially capitalize on the overall decentralization of Bay Area employment that may result as a long-term consequence of the pandemic<br>• Given a likely densification of San Ramon's employment areas, future office development will require less land area per building square foot |
| Industrial | 801,000 SF (12.7% vacant)<br><br>San Ramon currently accounts for less than 0.5% of the East Bay industrial inventory | San Ramon is essentially a non-player in the large (and growing) East Bay industrial market, so projecting future demand based on past trends is highly speculative. For long-term planning purposes, San Ramon might expect to attract **250,000 to 500,000 square feet** of new industrial space by 2040. | • Within the overall envelop of industrial buildings types, San Ramon should target the **flex/R&D** sub-market<br>• Demand potential would be enhanced by attracting major tech or life sciences users (i.e., spillover from Silicon Valley or spinoffs from Lawrence Livermore National Laboratory) |
| Hotel | 1,147 rooms in San Ramon<br><br>(74.1% occupancy in 2019; 51.4% in 2021) | Demand for new hotel development in San Ramon is projected to reach 129 rooms by 2040. This equates to one midsize hotel. | • Existing room inventory constant the past 20 years in San Ramon – no new facilities since 2002<br>• General demand growth over the next 18 years projected to support demand for one new hotel in San Ramon |

# II. Retail

## *Retail Market areas in general*

To add context to the discussion of retail opportunities and their respective market areas for San Ramon, TNDG first reviewed conditions in the entire Interstate 680 corridor from Pleasanton (and including Livermore) north to the Bay. This region is shown in Exhibit II-1 below. Material that follows in this section generally restricts the region under discussion to as far north as Pleasant Hill. The map also shows the pattern of projected change in population for the period of 2020 to 2030. Similar maps showing baseline population and employment levels and projected change in number of workers are attached at the end of this section (Exhibits II-3 through II-5).

EXHIBIT II-1. PROJECTED POPULATION CHANGE, 2020-2030 FOR I-680 CORRIDOR COMMUNITIES

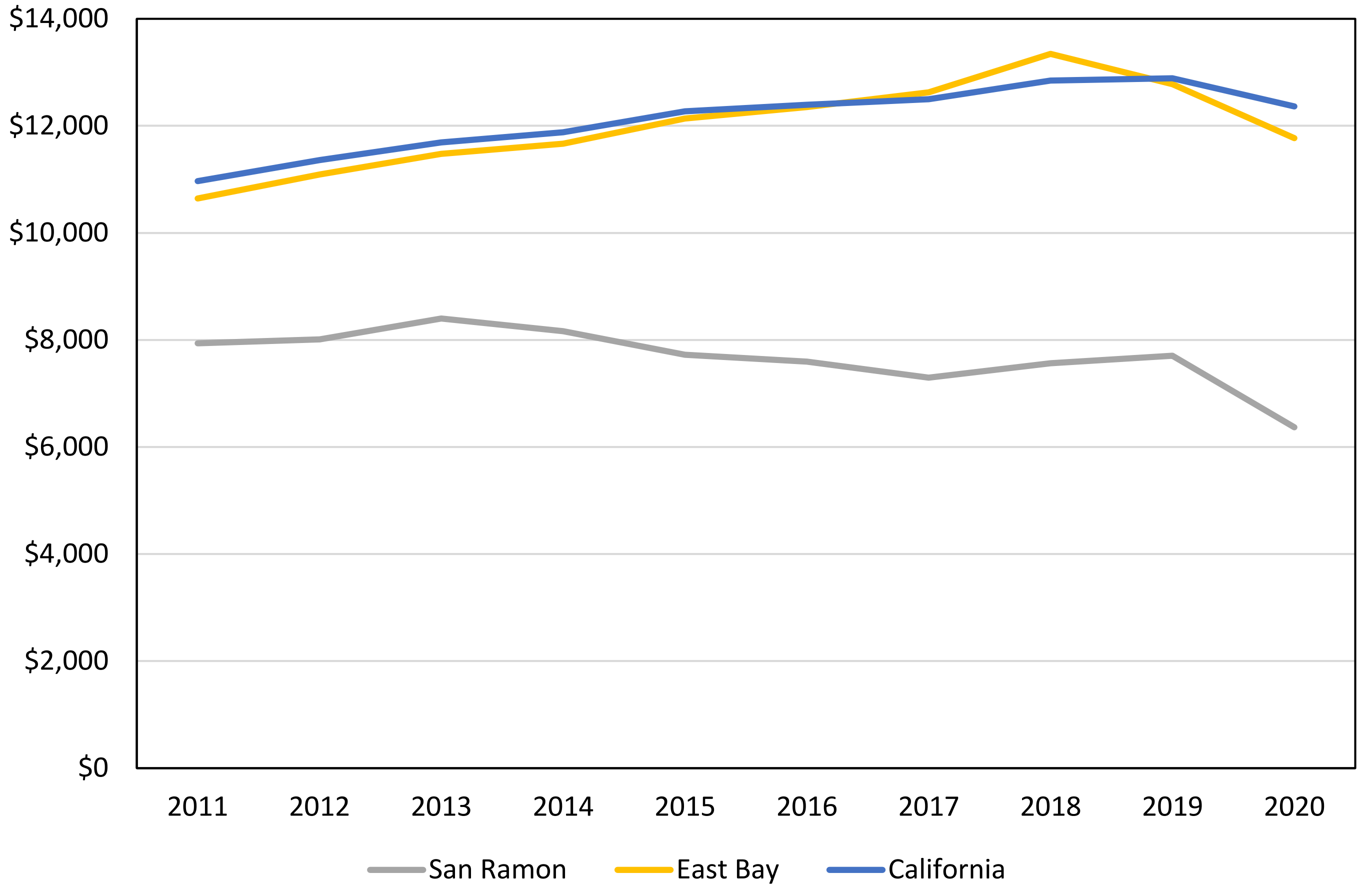



Source: Metropolitan Transportation Commission, Projections 2040 by Census Tract, 2019; TNDG.

## Existing patterns of retail/food-service business sales volumes

A historic view of retail/food service sales trends in the region is shown on Figure II-1, with per capita taxable sales figures adjusted for inflation to 2020 dollars. The data clearly indicate that the combined East Bay counties of Alameda and Contra Costa outperform San Ramon in both growth of per capita taxable sales in real dollars over time and in amounts. Sales in the East Bay also appear to have been more vulnerable to the effects of the pandemic than sales in California as a whole. Interestingly, taxable sales per capita for the combined seven cities in the I-680 corridor (including San Ramon), as discussed below (e.g., Figures II-2 through II-6), exceeded those of the East Bay region by over 25% in 2020.

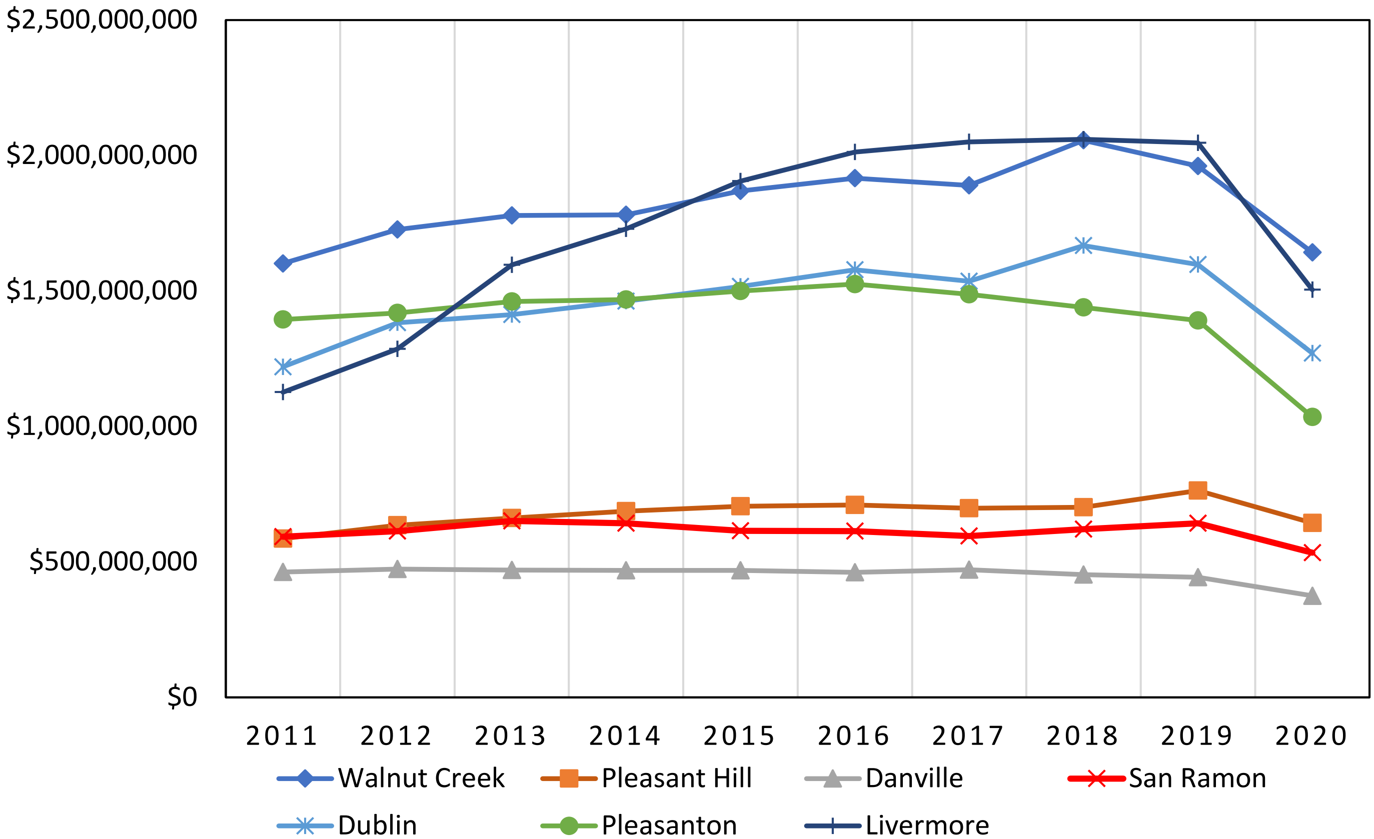
**FIGURE II-1. ANNUAL TOTAL TAXABLE SALES PER CAPITA (ADJUSTED TO 2020 DOLLARS FOR INFLATION)**




Source: California Department of Tax and Fee Administration, Taxable Sales, by City and County; TNDG.

Taxable sales trends by city are shown in Figure II-2. Note that these numbers represent total taxable sales for each city, adjusted for inflation as in the preceding chart to reflect 2020 dollars. The data highlight the unevenness of sales levels throughout the corridor, both in general and in terms of trends over time, where growth in sales has primarily occurred within Walnut Creek, Dublin, and Livermore. Indications that Livermore's taxable sales far outperformed the other cities is likely attributable to the opening of the discount shopping center now known as San Francisco Premium Outlets in 2012. Sales at this center could also have been particularly vulnerable to declines due to the pandemic, which also clearly shows up within the chart, for all cities but especially for Livermore, given that purchases at those stores would have been relatively discretionary compared to household essentials. Interestingly, all of the cities that showed the highest levels of sales also showed the most drastic rates of decline during the pandemic.

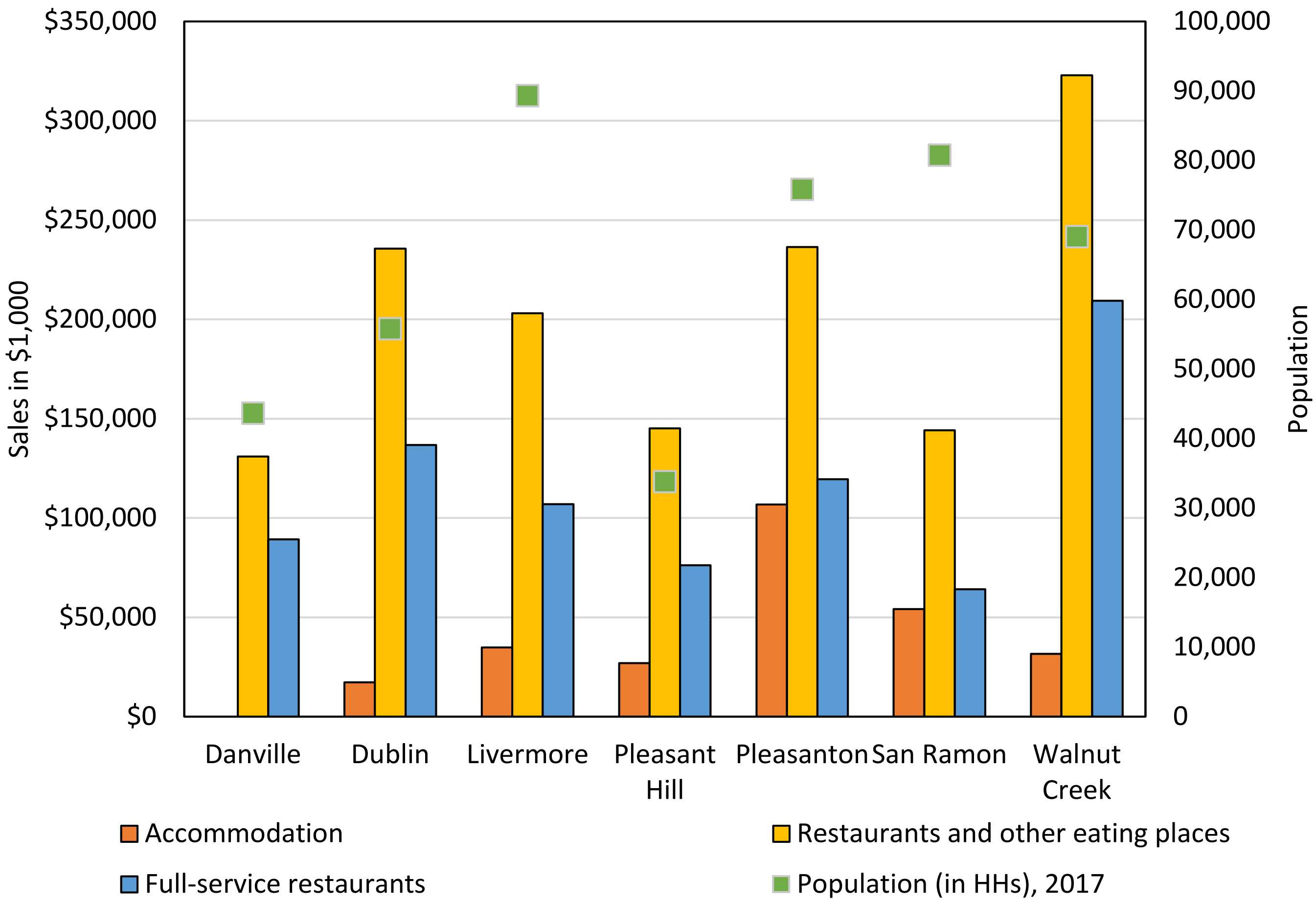
FIGURE II--2. TAXABLE SALES TRENDS IN REAL DOLLARS, I-680 CORRIDOR COMMUNITIES




Source: California Department of Tax and Fee Administration, Taxable Sales, by City; TNDG.

Hotel and restaurant sales in the corridor communities are shown on Figure II-3, using Economic Census data from 2017. The figure also shows populations of the cities and gives a sense of the relative position of each city with respect to these sales-activity measures. In the chart, San Ramon has one of the highest populations among the cities, but also among the lowest sales in the restaurant categories. It is in the middle/high of the range for hotel sales, with Pleasanton clearly leading in that category. In proportion to their populations, Dublin, Pleasant Hill, and Walnut Creek surpassed the other communities in the restaurant categories (Full-Service Restaurants are shown as a subcategory of Restaurants and Other Eating Places).

FIGURE II-3. HOTEL AND RESTAURANT SALES, 2017

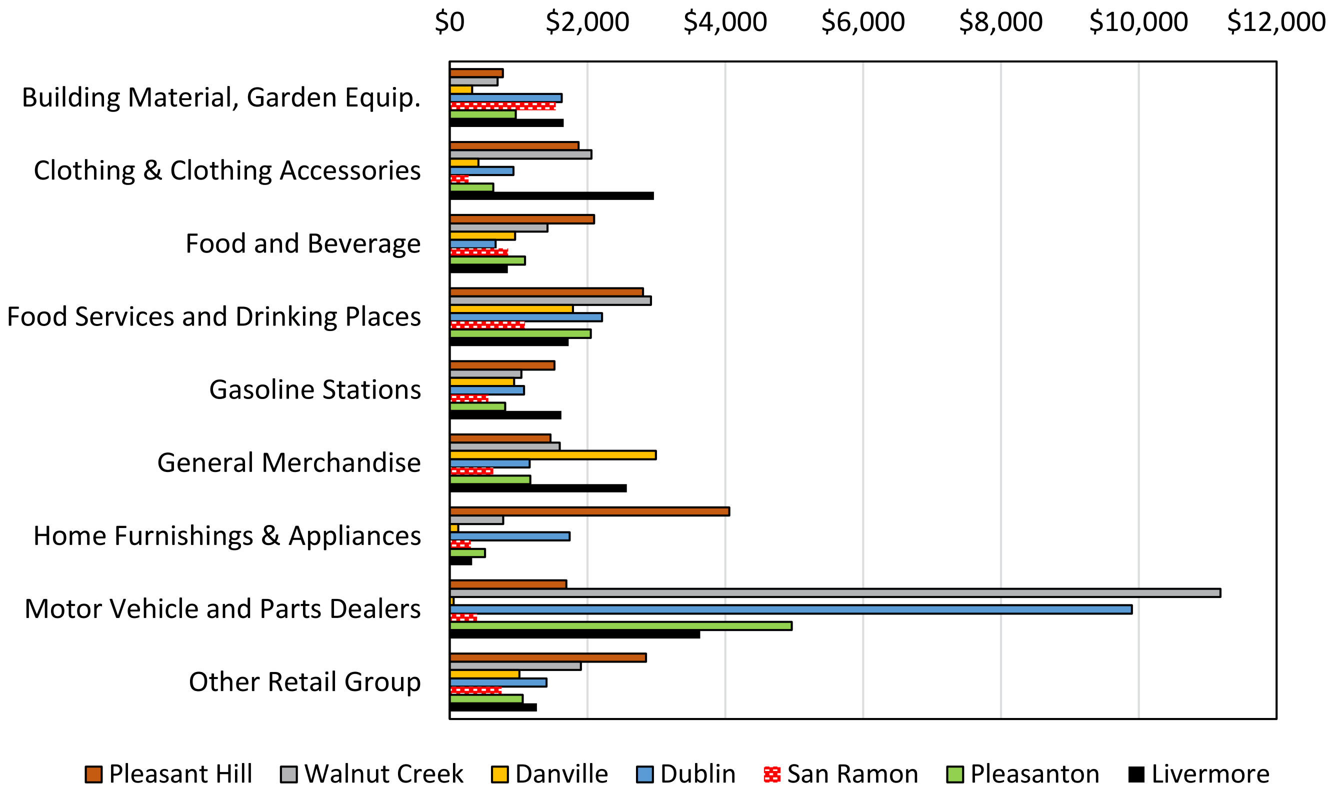



Source: Economic Census, Accommodation and Food Services: Summary Statistics for the U.S., States, and Selected Geographies, 2017; TNDG.

Throughout the region, the cities (incorporated and unincorporated) also have very uneven patterns of retail activity among themselves, within the various retail categories (see Figure II-4). This means for one thing that local demand for various types of goods and services does not match the pattern of existing establishments in ways that would otherwise be expected in an unencumbered market. Residents and workers do not always have access to necessary and desired goods and services within usual and reasonable travel distances. In these circumstances, cross-shopping is also common among residents of neighboring communities. However, the situation is even more complicated because these charts do not reflect the considerable amount of sales occurring in unincorporated areas of the two counties, amounting to 22 and 36%, respectively, for Alameda and Contra Costa Counties.

Previous studies focused on San Ramon have identified a lack of commercially developable land in the City as one cause of this uneven pattern, at least with respect to San Ramon.

FIGURE II-4. PER CAPITA TAXABLE SALES BY CATEGORY, I-680 CORRIDOR COMMUNITIES, 2020




Source: California Department of Tax and Fee Administration, Taxable Sales - Cities by Type of Business (Taxable Table 4); TNDG. https://www.cdtfa.ca.gov/dataportal/catalog.htm?subcategory=Taxable%20Sales%20in%20California

## Concentrations of regional-level shopping activity

Northward from San Ramon, Walnut Creek has regional center stores that include:

- Nordstrom's
- Macy's
- Loft Clothing
- Apple Store

Pleasant Hill has a number of retailers associated with community-level or regional shopping, including:

- Kohl's
- Marshall's
- Ross Dress for Less
- Burlington
- Dick's Sporting Goods
- Big 5 Sporting Goods
- Bed, Bath, and Beyond
- Target

South of San Ramon, Dublin has a strong representation among sporting goods stores, including:

- REI
- Big 5 Sporting Goods
- The Golf Mart

Other regional and community-level shopping outlets in Dublin include:

- Michaels
- Hobby Lobby
- Tesla
- Target
- PetSmart
- T.J. Maxx
- Best Buy

Pleasanton has regional shopping outlets including the following stores at Stoneridge Mall, among others:

- Macy's
- Express Clothing
- Clark's Shoe Store
- Pottery Barn
- ZARA Clothing
- Torrid Clothing
- Windsor women's clothing
- Apple
- H&M Clothing
- J. Jill women's clothing
- Forever 21
- American Eagle
- Aerie Women's clothing
- The Lego Store Stoneridge
- JCPenney
- Chico's

Notably, there are redevelopment plans for Stoneridge that have been put forth and continue to evolve over the last several years, which include the designation of housing opportunity sites and redevelopment of major retailers' stores, including Sears and Nordstrom's, to uses including other retail, fitness, entertainment, and office.[1] This kind of redevelopment planning and activity is in line with what would be expected for a well-located traditional regional mall of this vintage (early 1980s).

In San Ramon, City Center at Bishop Ranch has some regional-level stores, including Pottery Barn and West Elm, and some clothing stores that are regional-destination in nature, such as Anthropologie, but the city is generally lacking in this type of retail compared to its neighbors.

### Evolving retail industry affects prospects for development

The increasing role of e-commerce (irrespective of the pandemic), lingering effects of the pandemic, and changing consumer preferences over time all challenge the existing viability and future prospects of retail activities, disproportionately among the various business categories as well as specific retailers. While these impacts tend to be universal across the country, the localized effects play out differently according to such factors as the age, configuration, tenant mix, and attractiveness of existing retail centers.

Recent e-commerce statistics shown on Table II-1 indicate that the overall e-commerce share of retail activity, nationally, is between 13 and 14% of sales, with a sizable proportion of the total in Non-Store Retailers,[2] as would be expected.

---

[1] JLL marketing brochure, 2021; Pleasanton Planning Commission Agenda Report, February 27, 2019.

[2] Establishments in this subsector include mail-order houses, vending machine operators, home delivery sales, door-to-door sales, party plan sales, electronic shopping, and sales through portable stalls (BLS, Industries at a Glance).

**TABLE II-1. RETAIL SALES THROUGH E-COMMERCE COMPARED TO TOTALS**

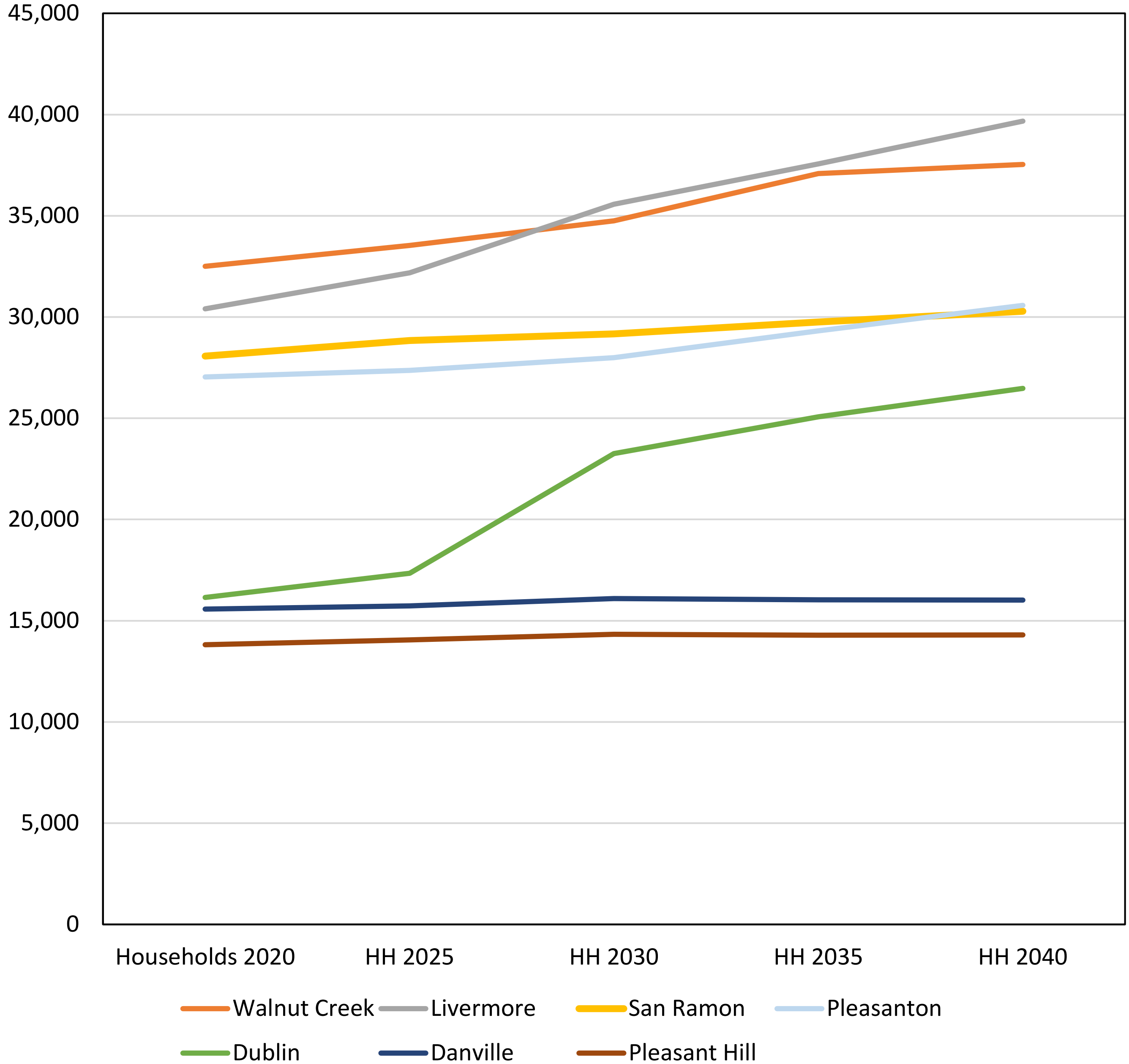
| Kind of Business | 2021 Q1 Retail Sales (millions) | | | |
|---|---|---|---|---|
| | Total Store and Non-store Sales | Total E-Commerce | % of major category | % of total sales |
| **Total Retail Trade** | **$1,472,314** | **$196,808** | **13.4%** | **13.37%** |
| Motor vehicle and parts | $354,166 | $14,725 | 4.2% | 1.00% |
| Furniture, building materials, and electronics | $183,240 | $26,464 | 14.4% | 1.80% |
| *Furniture and home furnishings* | | *$4,412* | *2.4%* | *0.30%* |
| *Electronics and appliances* | | *$15,988* | *8.7%* | *1.09%* |
| *Building materials, garden equipment and supplies* | | *$6,064* | *3.3%* | *0.41%* |
| Clothing and general merchandise | $267,936 | $31,046 | 11.6% | 2.11% |
| *Clothing and clothing accessories* | | *$13,180* | *4.9%* | *0.90%* |
| *General merchandise* | | *$17,866* | *6.7%* | *1.21%* |
| All other | $497,325 | $15,341 | 3.1% | 1.04% |
| *Food and beverage* | | *$6,913* | *1.4%* | *0.47%* |
| *Health and personal care* | | *$2,140* | *0.4%* | *0.15%* |
| *Sporting goods, hobby, musical instrument, and books* | | *$2,878* | *0.6%* | *0.20%* |
| *Miscellaneous including gasoline stations* | | *$3,410* | *0.7%* | *0.23%* |
| Nonstore retailers | $169,647 | $109,232 | 64.4% | 7.42% |

Source: Retail Indicators Branch, U.S. Census Bureau, Table 1. Supplemental Estimated Quarterly U.S. Retail Trade Sales - Total and E-commerce, 2021 Q1, 2; TNDG. E-commerce sales are defined by the Census Bureau as "sales of goods and services where the buyer places an order, or the price and terms of the sale are negotiated, over an Internet, mobile device (M-commerce), extranet, Electronic Data Interchange (EDI) network, electronic mail, or other comparable online system. Payment may or may not be made online." Blank cells mean no data available.

## Varying projected growth patterns

Market-area communities in Alameda County are expected to have considerably higher increases in population and employment (especially with respect to Dublin) over the next 10 years than San Ramon and other communities in Contra Costa County. Projected household growth is shown on Figure II-5 for the I-680 corridor cities. All other things being equal, this growth pattern would make Dublin, especially, and Livermore and Pleasanton more attractive than San Ramon to prospective retailers and shopping center developers. Within the other Contra Costa County I-680 corridor communities, residential and job growth are projected to be generally modest with the exception of Walnut Creek. (See also Exhibit II-1, and similar maps, showing baseline population and employment levels and projected change in number of workers, attached at the end of this document.)

Figure II-5. Projected Household Growth Through 2040 for I-680 Corridor Communities

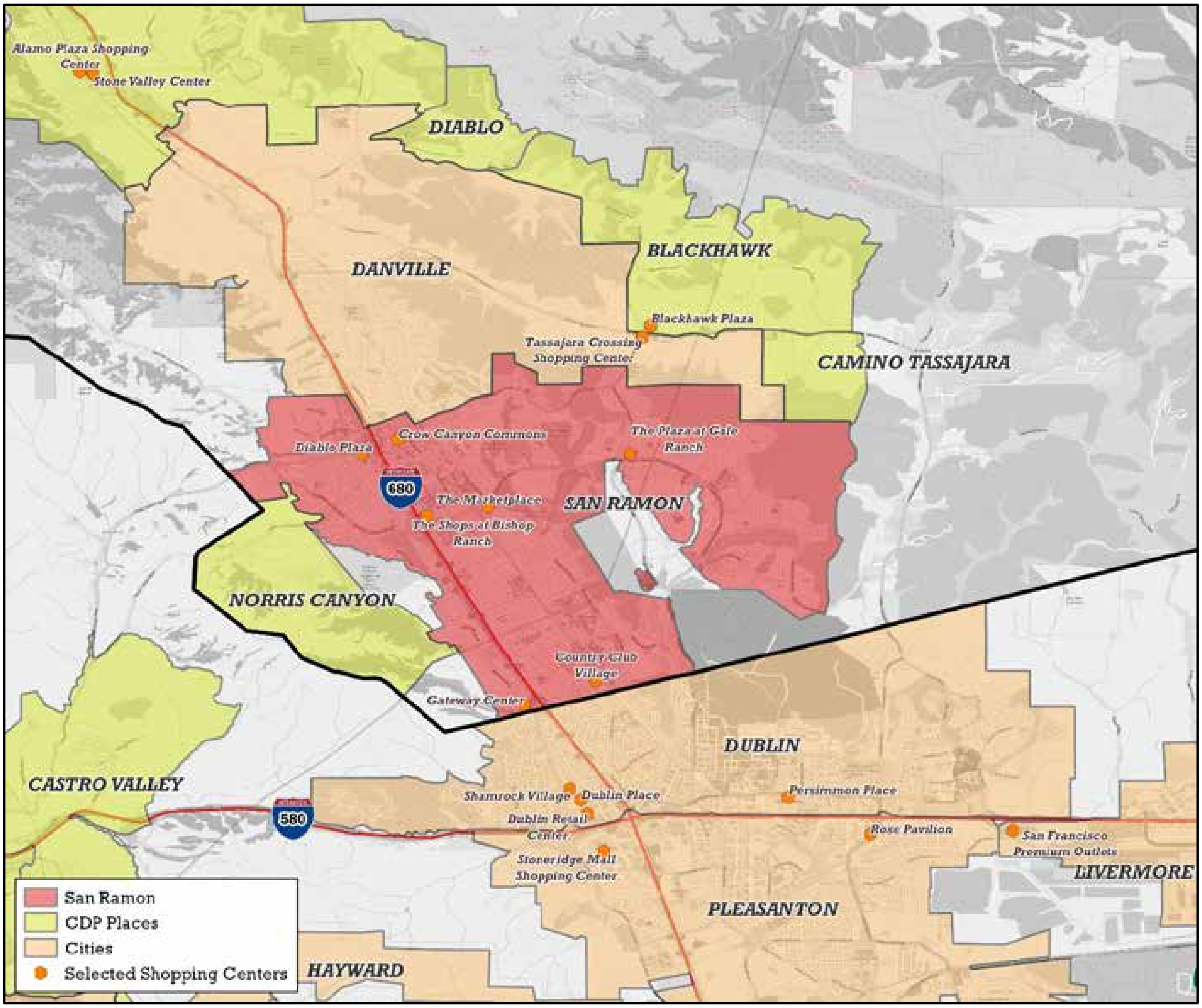



Source: Metropolitan Transportation Commission, Projections 2040 by Census Tract, 2019; TNDG.
https://services3.arcgis.com/i2dkYWmb4wHvYPda/arcgis/rest/services/pba2040_projections_tract_hh_pop/FeatureServer

## *Area around San Ramon*

The cities of San Ramon, Danville, Dublin, and Pleasanton, along with the unincorporated community of Alamo, are addressed below. Exhibit II-2 shows the boundaries of these communities along with the location of some of their primary shopping centers.

**EXHIBIT II-2. SAN RAMON AND SURROUNDING COMMUNITIES**




Source: U.S. Census Bureau; USGS GNIS; TNDG.

### San Ramon

**Previously identified retail challenges.** Previous studies focused on San Ramon have identified clear evidence of retail leakage in numerous categories, including general merchandise, home furnishings, clothing, restaurants, and miscellaneous other retail, as well as motor vehicle dealers. This observation is also cursorily confirmed by reviewing the per capita sales numbers on Figure II-4, above. Part of this problem relates to the current attractiveness and adaptability of some existing centers in the City, including the tendency for center activities to convert from retail uses to service and other non-retail functions. An example of this is in evidence at a center which actually has imposed a separate type of challenge to the City: Blackhawk Plaza, a 250,000 square-foot lifestyle center located in the unincorporated Blackhawk community located less than 1 mile beyond the City boundaries, convenient to local residents but not part of the City's retail inventory. The center appears to be undergoing a transition from retail to service functions, which would generally not enhance its status as a lifestyle center. In the process, it would also reduce opportunities for existing centers within the City to make this transition.

San Ramon is particularly lacking in auto-related sales. Because of the large sites typically required for automobile businesses, attempting to build this capacity in the City may not be a practical option. Even if it were, however, auto sales may be challenged in the near future for multiple reasons, including the growing popularity of electric vehicles, some of which may be sold in unconventional venues (and tend to require less scheduled service of the type typical in current dealerships), and the advent of autonomous vehicles, some of which may be deployed in fleets by large providers rather than owned privately.

**Retail strength**. San Ramon appears to be capturing patronage from outside the City for the category of Building Materials and Garden Equipment and Supplies (Figure II-4).

**Competitive position based on projected growth.** Modest growth is projected for San Ramon as well as Danville, to the north, while to the south Dublin is expected to add roughly 7,000 households in the next 10 years. Pleasanton and Livermore combined are expected to add an additional 6,000 households between 2020 and 2030. San Ramon businesses could capture some additional resident demand based on growth projected for unincorporated areas to the east (see also Exhibit II-1).

**Competitive strength due to the presence of local jobs.** San Ramon has a relatively high concentration of jobs in the City, as indicated by the ratio of the number of jobs to number of households: 1.92 in 2020, which is higher than the average for the I-680 corridor cities of 1.48. This relatively high number of jobs supplements the customer base for local businesses.

### Danville

**Retail strengths and weaknesses.** Danville appears to be capturing patronage from outside the city for the category of General Merchandise Stores, and lags other cities in the Building Material category.

### Dublin

**Retail strengths and weaknesses.** On a per-capita-sales basis, Dublin outperforms San Ramon in every retail category except Food and Beverage Stores. Auto sales are particularly strong there, although Walnut Creek is the leader for the region.

**Competitive position based on projected growth.** As noted above, Dublin is projected to increase population and employment to a considerably greater degree than its neighboring cities (both in absolute numbers and rate of growth).

### Pleasanton

**Competitive strength due to the presence of local jobs.** Pleasanton has the most jobs of all the I-680 corridor cities, at 65,185, and also a considerably higher ratio of jobs to households, at 2.41 in 2020, than all of the other corridor communities. Job growth is projected to be relatively modest, at less than 3% over 10 years, a rate similar to projected job growth for San Ramon.

**Retail strengths and weaknesses.** On a per-capita-sales basis, Pleasanton outperforms San Ramon in every retail category except Building Materials. The relatively high levels of jobs in the city could explain some of this competitive advantage, but is unlikely to be a factor in certain categories, particularly Home Furnishings, Motor Vehicles, and Clothing.

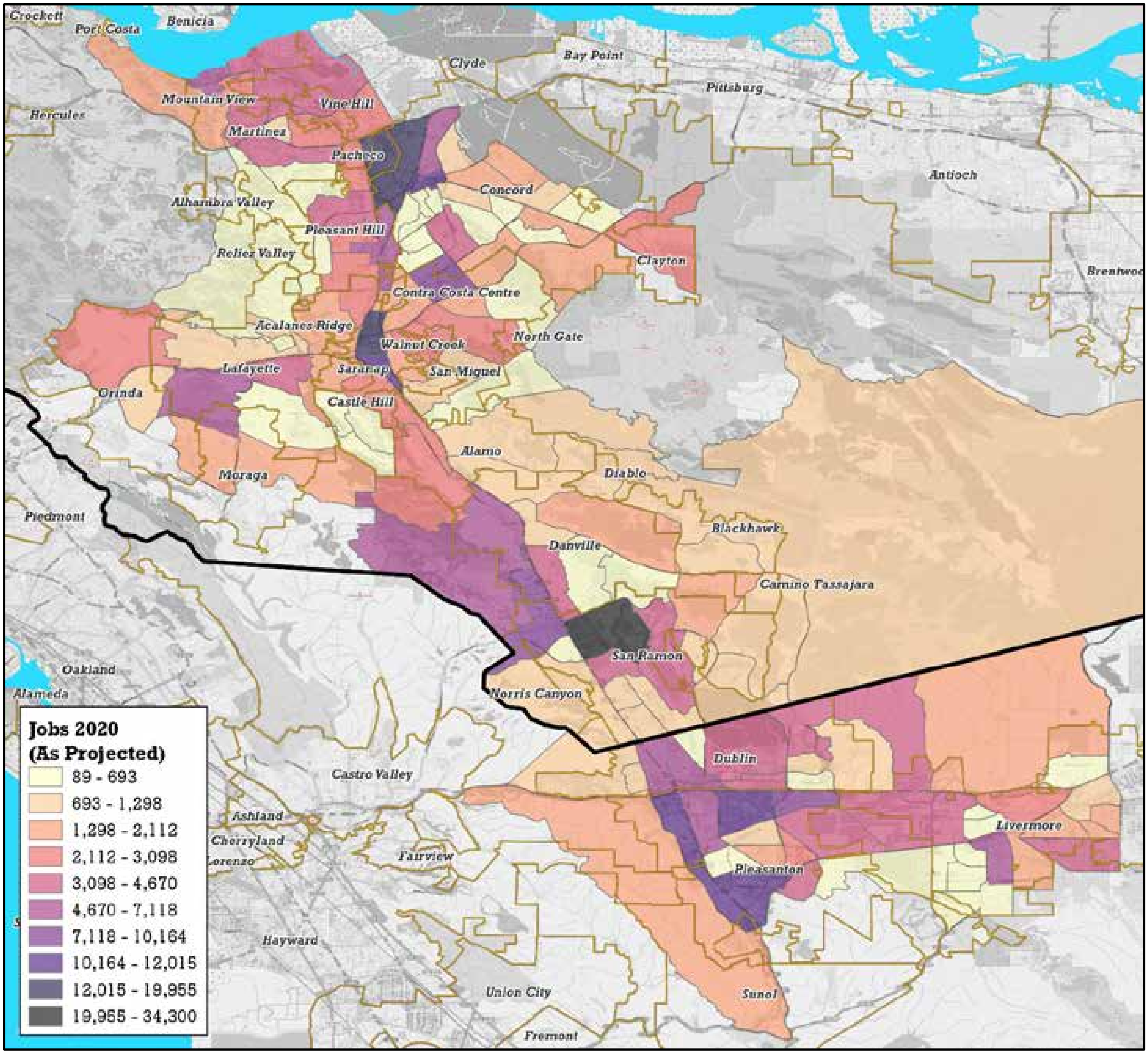
### Livermore

**Retail strengths.** Livermore exhibits strong sales in the General Merchandise category, and in Clothing Stores, all of which likely relate primarily to the presence of the San Francisco Premium Outlets shopping center – a large center of retail discount stores that appears to be successful but by its nature is not directly competitive to stores in San Ramon.

### Alamo

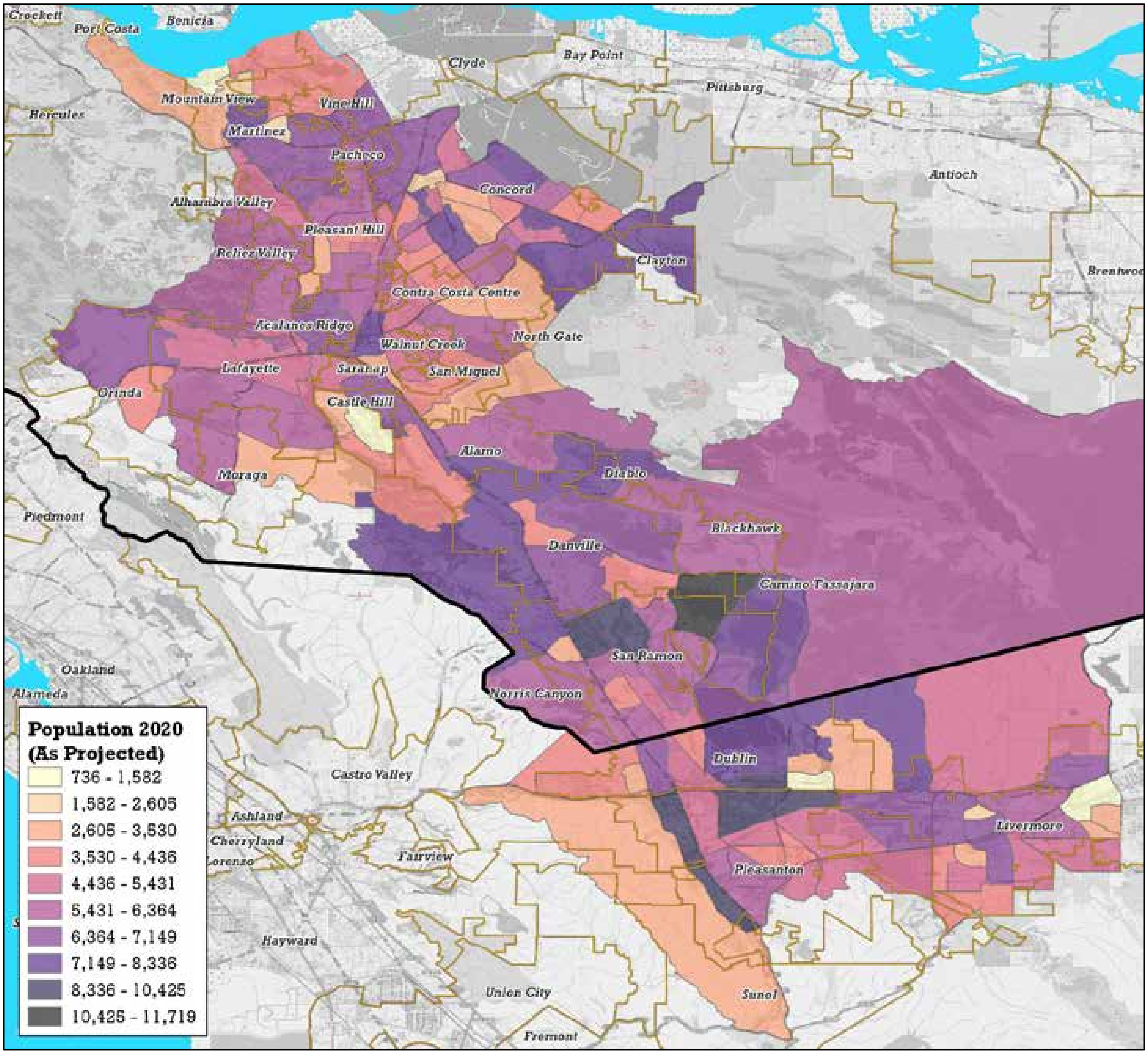
**General retail conditions.** Taxable retail sales for this unincorporated community can be estimated by using data from the 2017 Census of Retail Trade which, when combined with other sales information for the communities within the I-680 corridor, indicate that the retail base in the community generally meets about 2/3rds of the community's resident demand. This increment of unmet demand (equivalent to roughly 1,700 households) will likely be met in stores in neighboring communities, with Walnut Creek establishments having the primary advantage based on proximity. Some of this unmet demand could be captured by stores in San Ramon.

EXHIBIT II-3. BASE EMPLOYMENT, 2020 FOR I-680 CORRIDOR COMMUNITIES



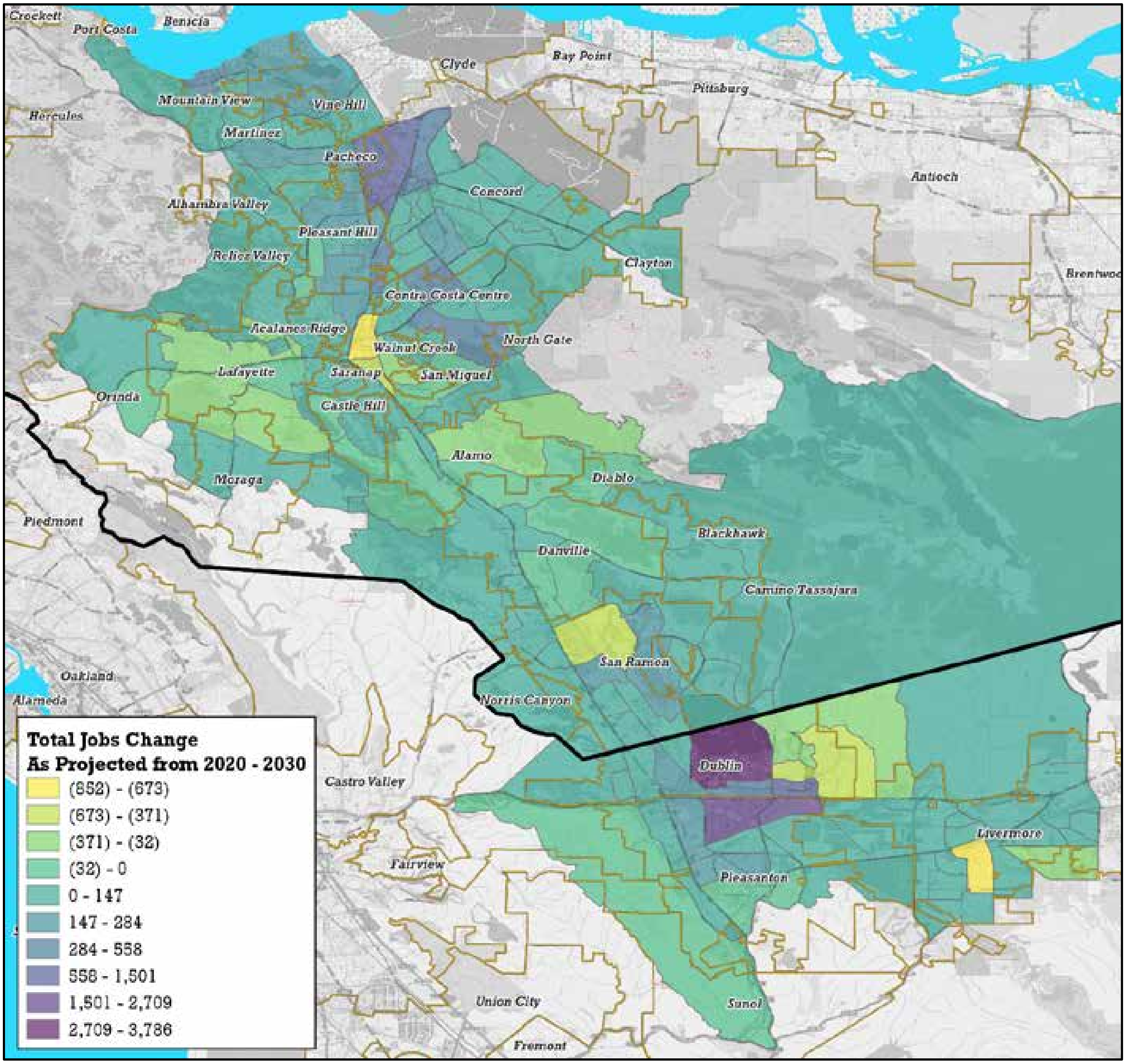

Source: U.S. Census Bureau; Metropolitan Transportation Commission, Projections 2040 by Census Tract, 2019; TNDG.

EXHIBIT II-4. BASE POPULATION, 2020 FOR I-680 CORRIDOR COMMUNITIES




Source: U.S. Census Bureau; Metropolitan Transportation Commission, Projections 2040 by Census Tract, 2019; TNDG.

**EXHIBIT II-5. PROJECTED EMPLOYMENT CHANGE, 2020-2030 FOR I-680 CORRIDOR COMMUNITIES**




Source: U.S. Census Bureau; Metropolitan Transportation Commission, Projections 2040 by Census Tract, 2019; TNDG.

## *Major Trends and Concepts Considered in Retail Demand Analysis*

Future retail development opportunities in San Ramon will be influenced by a mix of countervailing factors, including the following:

- ***Global trends within the retail industry (negative influence):*** Brick-and-mortar shopping facilities (and the major retail chains that have traditionally served as anchor tenants) have increasingly been impacted by the growth in e-commerce and this trend has been exacerbated by the Covid 19 pandemic. Whereas this ongoing trend is generally expected to reduce the "footprint" of retail buildings (especially in communities such as San Ramon which have not established themselves as major regional shopping destinations), opportunities will still exist for specialized commercial districts focused on activities that are not directly competing with online shopping (e.g., "experiential retail"). As older retail facilities are compelled to reposition themselves in the current market environment (potentially downsizing or converting to other land uses), future retail development can focus on these specialized shopping/dining/entertainment concepts.

- ***San Ramon's substantial existing "leakage" of resident retail demand (potentially a positive factor):*** As documented by TNDG's retail demand model (see Appendix A), San Ramon currently retains very small portions of its resident demand in most retail sales categories. Moreover, the City attracts very little external demand from the larger region. Although demand "leakage" is generally considered undesirable from a city's perspective (since it reflects a lack of local shopping/service amenities for residents and a loss of potential sales tax revenue for the municipality), it can in some ways be thought of as an "untapped potential" that creates opportunities for new development not dependent on future population growth. Whereas it is highly unlikely that San Ramon will ever achieve anything close to 100% capture of its resident demand (since well-established regionally shopping destinations in other communities will likely always attract some of San Ramon's purchasing power), the magnitude of San Ramon's existing leakage (especially in the sales categories typically associated with destination-oriented shopping) is so large that even a modest recapture of this demand would translate into significant amounts of supportable space. Broader economic trends in the region (e.g., the likely transition/downsizing of some retail centers in competitor cities and expected increase in remote workers) are likely to create a scenario in which more people are likely to shop closer to home, suggesting that a modest recapture of "leaked" resident demand is a feasible prospect for San Ramon.

- ***Modest projected population growth (generally a constraining factor):*** San Ramon and the immediately surrounding unincorporated communities are largely built out, resulting in the expectation of relatively modest future population growth. For the primary retail trade area defined for this study (see map), official population forecasts from ABAG suggest an average annual growth rate of about 0.6% over the next 20 years (through 2040). In percentage terms, this is not what would typically be considered "dynamic" growth. However, it still translates to about 12,000 new trade area residents which, over time, will create significant incremental demand for resident-serving retail facilities.

- ***Expected evolution of Bishop Ranch (potentially a positive factor):*** Billed as "Northern California's premiere business park," Bishop Ranch is likely to continue to strongly influence San Ramon's development/business image in the coming years. According to sources interviewed for this study, Bishop Ranch is expected to intensify its current development model as a mixed-use complex, toward a higher-density "village" that would lend itself to an expanded range of high-caliber employment, residential, and "lifestyle" commercial activities. This "next generation" of Bishop Ranch will potentially create opportunities to continue to expand upon retail development concepts and tenant types not previously well represented in San Ramon (giving credence to the idea that recapture of at least a portion of historic demand leakage is a realistic possibility).

## *Overview of Forecasting Approach*

Given that this market analysis is being conducted in support of the City's General Plan update, it is appropriate for the projections to cover a long-term planning horizon and to reflect a forecasting methodology that is relatively aggressive (so as not to underestimate – from a land use planning perspective – the amounts of land San Ramon might ultimately need to devote to retail development). TNDG's retail demand analysis, fully documented in Appendices A and B, considers a 20-year forecast period (through 2040) and incorporates the following major steps:

1. Define primary and second market areas (PMA and SMA) from which retail facilities in San Ramon can potentially attract market demand;

2. Estimate San Ramon's existing capture/leakage rates of resident retail demand in each major retail sales category;

3. Forecast future development demand (expressed in square footages of supportable retail space) based on two scenarios:

    a. A "baseline" scenario that calculates incremental demand based strictly on population growth (with San Ramon's capture rates of potential demand projected to remain at the existing relatively low levels through 2040); and

    b. A "leakage-recapture" scenario that calculates future retail demand based on incremental population growth and increased market shares (capture rates). As described below, even under the recapture scenario, capture rates are projected to remain well below the theoretical maximum of 100%. The assumption of capture rates well below 100% also incorporates the expectation that online sales will increasingly impact demand for brick-and-mortar retail facilities.

## *Summary of Key Findings*

Exhibit II-6 and Tables II-2 through II-5 provide a succinct summary of TNDG's retail demand analysis (see Appendices A and B for details).

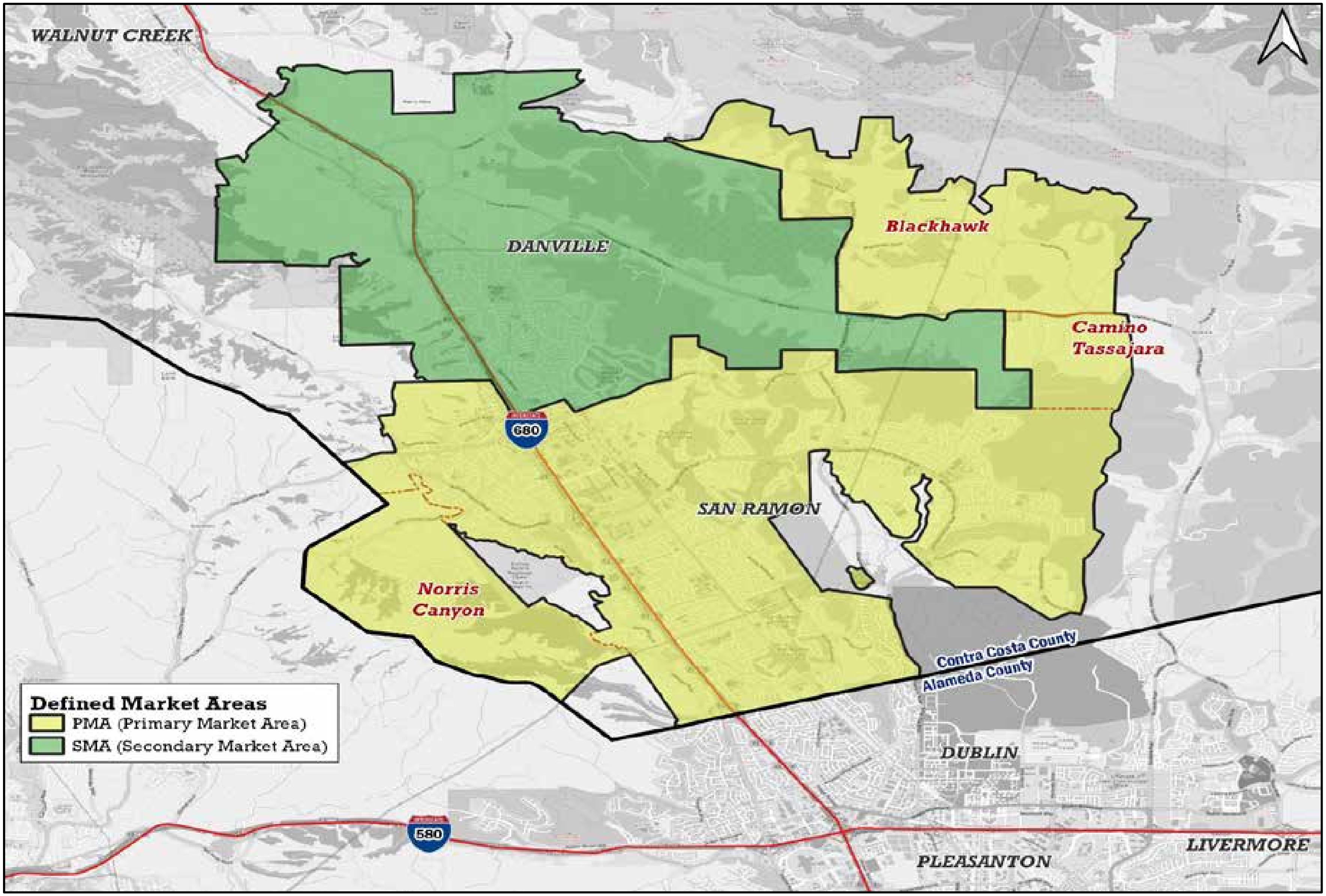
***Trade Area Definitions.*** For purposes of the demand analysis, TNDG has defined the following potential trade areas for San Ramon:

- Primary Market Area (PMA) – the City of San Ramon and the immediately adjacent unincorporated communities of North Canyon, Camino Tassajara, and Blackhawk
- Secondary Market Area (SMA) – the Town of Danville

As described elsewhere in this report, these trade areas reflect San Ramon's geographic position within a larger regional trade area and the locations of major competitive retail facilities in neighboring communities.

Exhibit II-6 below provides a map of the PMA and SMA.

EXHIBIT II-6. DEFINED MARKET AREAS




Source: TNDG.

***Existing Retail Market Conditions.*** To put the future demand projections into perspective, Table II-2 highlights existing conditions for San Ramon's existing commercial retail market. As of third quarter 2021, San Ramon had an estimated total inventory of approximately 2.7 million square feet of retail space, with a relatively healthy vacancy rate of 5.5%. For the 12-month period ended September 30, 2021, net absorption (i.e., the net change in occupied retail space) in San Ramon was 61,900 square feet. As a point of context, if that absorption rate were maintained over the 20-year forecast horizon of this study, it would translate into demand for approximately 1.2 million square feet of new retail space.

**TABLE II-2. SNAPSHOT OF RETAIL MARKET CONDITIONS, CITY OF SAN RAMON, THIRD QUARTER 2021**

| | Square Feet |
|---|---|
| Total Retail Space | 2,700,000 |
| 12-Month Net Absorption | 61,900 |
| Vacancy Rate | 5.5% |

Source: CoStar/TRI Commercial.

The primary shopping centers in San Ramon are shown in Table II-3 below. Total area for these centers is just under 1.4 million SF. The total retail area of 2.7 million SF (Table II-2) includes free-standing and other smaller centers.

TABLE II-3. EXISTING SHOPPING CENTERS IN SAN RAMON

| Property Name or Location | Property Type | Area | Representative Tenants |
|---|---|---|---|
| Courtyard Center | Retail (Neighborhood Center) | 55,298 | The Bath Studio, Favorite Indian Restaurant, Tomahawk Steak |
| 2551 San Ramon Valley Blvd | Retail | 52,149 | Avis, Erik's DeliCafe |
| Country Club Village | Retail (Neighborhood Center) | 97,390 | Walmart Neighborhood Market, CVS |
| Crow Canyon Commons | Retail (Community Center) | 190,390 | Sprouts, Rite Aid, Big 5, Alamo Hardware |
| Gateway Centre | Retail (Neighborhood Center) | 88,034 | Lucky, Dollar Tree |
| Target | Retail (Community Center) | 144,999 | Target |
| City Center Bishop Ranch: Phase I | Retail (Lifestyle Center) | 285,525 | Equinox, Pottery Barn, Sephora |
| 11050 Bollinger Canyon Rd | Retail (Neighborhood Center) | 59,000 | Safeway, Subway, Peet's |
| 2750 Crow Canyon Rd | Retail | 106,840 | Home Depot, Staples |
| The Marketplace At San Ramon | Retail (Community Center) | 84,804 | CVS, Trader Joes, Nob Hill Foods |
| Safeway | Retail (Neighborhood Center) | 61,999 | Safeway, CVS, BevMo |
| The Shops at Bishop Ranch | Retail (Community Center) | 98,000 | Whole Foods, Mancini's Sleepworld |
| 132 Sunset Dr | Retail (Community Center) | 69,905 | HomeGoods, Chipotle |

Source: Edward Del Beccaro, TRI Commercial.

Regional retail market conditions, for areas north and south of San Ramon, are summarized in Table II-4. The numbers provide additional context for the retail situation in San Ramon.

**TABLE II-4. RETAIL MARKET SUMMARY, TRI-VALLEY AND CENTRAL CONTRA COSTA**

| Market Indicator | Tri-Valley | Central Contra Costa |
|---|---|---|
| Total Retail | 8,978,306 | 5,343,927 |
| Vacancy | 8.3% | 4.8% |
| Market Rents | $30.95 | $32.14 |

Source: Colliers International, Retail Market Report, Spring 2020; CoStar, 12/13/2021 TRI Commercial (San Ramon figures).

***San Ramon's Existing Capture of Resident Retail Demand.*** Table II-5 summarizes San Ramon's existing capture of resident retail demand. For each major retail sales category, the table compares theoretical demand (based on population and income levels in the PMA) to actual retail sales in San Ramon in 2019 (TNDG has chosen 2019 as the base year in order to avoid short-term market distortions that occurred in 2020 due to the pandemic). The analysis shows that, overall, San Ramon captures only about half (51%) of its theoretical resident demand (note that the capture/leakage calculations on Table II-5 are based solely on demand within the Primary Market Area and do not include demand associated the Secondary Market Area).

For individual sales categories, capture rates range from a low of 17% (i.e., 83% leakage) in the Motor Vehicles and Parts Dealers group to over 100% (suggesting some capture of external/SMA demand) in the Building Materials/Hardware category. San Ramon's existing leakage represents "untapped" demand that could theoretically support additional retail space in the city. In total, San Ramon's existing leakage equates to nearly 1.4 million square of supportable retail space as of the 2019 base year of this analysis. In should be emphasized that this is a highly theoretical number (since it is unlikely that San Ramon would ever achieve anything close to 100% capture of its resident retail demand), but it is useful for putting the future demand forecasts into perspective.

**TABLE II-5. ANALYSIS OF EXISTING CAPTURE OF RESIDENT RETAIL DEMAND, SAN RAMON PRIMARY MARKET AREA (PMA)**

| Retail Sales Category | Theoretical Demand in 2019 PMA (1) | Actual Sales in 2019 | Effective Existing Capture Rate | Additional Space (Square Feet) Supportable by Leakage (2) |
|---|---|---|---|---|
| *Shopper Goods/GAFO (3):* | | | | |
| Clothing and Clothing Accessories | $109,643,215 | $21,707,211 | 20% | 251,246 |
| General Merchandise | $203,623,113 | $71,378,369 | 35% | 377,842 |
| Home Furnishings and Appliances | $78,316,582 | $33,878,947 | 43% | 126,965 |
| Specialty/Other | $203,623,113 | $88,321,130 | 43% | 329,434 |
| Subtotal | $595,206,022 | $215,285,658 | 36% | 1,085,487 |
| *Convenience Goods:* | | | | |
| Food and Beverage | $234,949,746 | $208,933,243 | 89% | 43,361 |
| Food Service and Drinking | $234,949,746 | $132,720,996 | 56% | 170,381 |
| Subtotal | $469,899,491 | $341,654,239 | 73% | 213,742 |
| *Heavy Commercial Goods:* | | | | |
| Bldg. Matrl., Garden Equip. and Supplies | $109,643,215 | $118,315,224 | 108% | 0 |
| Motor Vehicle and Parts Dealers | $234,949,746 | $39,258,757 | 17% | 88,061 (4) |
| Gasoline Stations | $156,633,164 | $92,080,558 | 59% | N/A |
| Subtotal | $501,226,124 | $249,654,539 | 50% | 88,061 |
| Total | $1,566,331,637 | $806,594,436 | 51% | 1,387,290 |

(1) Primary Market Area (PMA) includes the City of San Ramon and the unincorporated communities of Blackhawk, Camino Tassajara, and Norris Canyon.
(2) Square footages of additional retail space that could theoretically be supported in San Ramon as of 2019 if all leakage were fully recaptured.
(3) GAFO = General Merchandise, Apparel, Furniture and Other.
(4) Supportable square footage is for Auto Parts stores (not automobile dealerships).
Source: The Natelson Dale Group, Inc. (See Appendix A)

***Future Capture Rate Scenarios.*** Table II-6 shows the future capture rate assumptions that have been applied to the two forecasting scenarios.

For the baseline scenario, PMA capture rates for each retail sales category are projected to permanently remain at the existing relatively low levels implied by the leakage analysis. Under the baseline scenario, San Ramon is projected to capture no significant/net demand from the SMA (with the exception of the Building Materials/Hardware category in which San Ramon is currently estimated to capture the equivalent of 15% of SMA demand).

For the more aggressive leakage-recapture scenario, San Ramon's capture rates of PMA demand are projected to modestly increase starting in 2030 (and remain at the higher levels through 2040). The leakage-recapture scenario assumes that San Ramon would achieve nominal (2%) capture rates of SMA demand in key shopping/dining categories. This scenario also includes a demand "bump" associated with San Ramon's daytime employee population (see Tables B-12 and B-13 of Appendix B).

TABLE II-6. CAPTURE RATE SCENARIOS, SAN RAMON TRADE AREAS

| Retail Sales Category | Baseline Scenario (1) (Existing Capture Rates Maintained) | | Leakage-Recapture Scenario (2) (Increased Capture Rates 2030-2040) | |
|---|---|---|---|---|
| | PMA (3) | SMA (4) | PMA | SMA |
| *Shopper Goods/GAFO* | | | | |
| Clothing and Clothing Accessories | 20% | 0% | 35% | 2% |
| General Merchandise | 35% | 0% | 45% | 2% |
| Home Furnishings and Appliances | 43 | 0% | 50% | 2% |
| Specialty/Other | 43% | 0% | 50% | 2% |
| *Convenience Goods:* | | | | |
| Food and Beverage | 89% | 0% | 95% | 0% |
| Food Service and Drinking | 56% | 0% | 85% | 2% |
| *Heavy Commercial Goods:* | | | | |
| Bldg. Matrl., Garden Equip. and Supplies | 100% | 15% | 100% | 15% |
| Motor Vehicle and Parts Dealers | 17% | 0% | 17% | 0% |
| Gasoline Stations | 59% | 0% | 70% | 0% |

(1) Baseline scenario calculates incremental retail demand based strictly on projected population growth (capture rates remain at existing relatively low levels through 2040).
(2) Leakage-recapture scenario calculates incremental retail demand based on population growth AND increased market shares (capture rates). Even under the recapture scenario, capture rates are well below the theoretical maximum of 100%. The assumption of capture rates well below 100% reflects the expectation that online sales will increasingly impact demand for brick-and-mortar retail facilities.
(3) Primary Market Area (PMA) includes the City of San Ramon and the unincorporated communities of Blackhawk, Camino Tassajara, and Norris Canyon.
(4) Secondary Market Area (SMA) includes the Town of Danville.
Source: The Natelson Dale Group, Inc. (See Appendix A).

***Supportable Square Feet of New/Incremental Retail Space.*** Table II-7 summarizes TNDG's 2030 and 2040 demand projections for the two forecast scenarios.

Under the more conservative baseline scenario, San Ramon could support 530,000 square feet of additional retail space by 2030 and 1.1 million square feet (cumulatively) by 2040. These numbers represent net increases over and above the city's existing retail space inventory.

Under the leakage-recapture scenario, San Ramon could support 1.1 million square feet of additional retail space by 2030 and 1.8 million square feet (cumulatively) by 2040.

TABLE II-7. SUPPORTABLE SQUARE FEET OF NEW/INCREMENTAL RETAIL SPACE, CITY OF SAN RAMON

| Retail Sales Category | Baseline Scenario (Existing Capture Rates Maintained) | | Leakage-Recapture Scenario (Increased Capture Rates 2030-2040) | |
|---|---|---|---|---|
| | 2030 | 2040 | 2030 | 2040 |
| *Shopper Goods* | | | | |
| GAFO (1) | 207,376 | 449,203 | 528,811 | 864,885 |
| *Convenience Goods:* | | | | |
| Food and Beverage | 119,641 | 257,203 | 162,181 | 312,251 |
| Food Service and Drinking | 73,184 | 159,740 | 252,436 | 391,638 |
| Subtotal | 192,825 | 416,944 | 414,617 | 703,889 |
| *Heavy Commercial Goods:* | | | | |
| Bldg. Matrl., Garden Equip. and Supplies | 123,716 | 266,766 | 123,716 | 266,766 |
| Automotive Parts* | 6,463 | 13,557 | 6,463 | 13,557 |
| Gasoline Stations | N/A | N/A | N/A | N/A |
| Subtotal | 130,179 | 280,323 | 130,179 | 280,323 |
| ***Total Retail Space*** | ***530,380*** | ***1,146,470*** | ***1,073,607*** | ***1,849,097*** |

(1) GAFO = General Merchandise, Apparel, Furniture and Other.
Source: The Natelson Dale Group, Inc. (See Appendix A).

# III. San Ramon Office and Industrial Market

## *Locational overview*

San Ramon is a relatively new city, only incorporating in 1983. It was primarily agricultural until I-680 was completed in the 1960's and the suburban migration began from San Francisco. San Ramon is the northern part of the Tri-Valley commercial market (and that just outside of the Tri-Valley market according to some real estate brokerage reports), with a population of approximately 84,000. San Ramon is centrally located on south I-680 and is therefore a beneficiary of office and tech companies migrating west to east from San Francisco and Oakland, and south from Walnut Creek. (San Ramon is 34 miles east of San Francisco.) The San Ramon commercial market also benefits from the west-to-east Silicon Valley/Fremont migration to Tri-Valley. It is located close to the high-end residential communities of Blackhawk, Danville, Alamo, and Pleasanton, where company executives could live.

There are two main commercial office/R&D/warehouse districts. The Primary commercial District is the Bishop Ranch Business Park, with over 585 acres and over 9 million sf of office, commercial and retail space – well over half the San Ramon Commercial Market. Bishop Ranch is surrounded by office, commercial, R&D, and warehouse on the north, east and south, with I-680 on the west. The other San Ramon commercial area is west of I-680 – the old San Ramon commercial district, where there are restaurants, hotels, shopping centers, office parks and warehouses.

There are no new industrial, R&D or office projects in the development pipeline. Major new other planned development includes placing over 4,500 residential units where some 40-year-old-plus office buildings in Bishop Ranch will be torn down, and also the lease-up of the Bishop Ranch retail project: City Center, which is similar to San Jose's Santana Row, with over 300,000 sf of retail, restaurants, and entertainment venues. This project, which is near City Hall, serves as the de facto downtown.

As a supplement to the office and industrial demand projections summarized in this chapter, Appendix C provides an "industry cluster" analysis that evaluates San Ramon's employment trends (by industry group) relative to regional and national benchmarks. The industry cluster analysis is intended to identify employment growth opportunities that will potentially drive future demand for office and industrial space. These data will also be utilized as part of the strategic basis for the General Plan Economic Development Element.

## *Office*

San Ramon has a total of 9.5 million sf of all types of office with a third quarter 2021 vacancy of 15.8%, representing over 1.5 million vacant sf. The 3,785,000 SF of Class A office space has a 13.1% vacancy rate. Average rents in San Ramon are $2.74 per sf full-service, which is only 50 to 55 % of the rent needed to match building replacement value; so except for build-to-suits (for specific, major tenants) and medical no new office buildings will be planned for the next several years. San Ramon has lower rental rates than Walnut Creek to the north and Tri-Valley/Pleasanton to the south. Office market data are summarized in Table III-1 below. Generally, the figures for San Ramon compare favorably to those for the totals of the cities this drop represented in the Tri-Valley and North I-680 regions.

TABLE III-1. OFFICE MARKET DATA FOR SAN RAMON AND MARKET AREAS IN REGION

| Office | Tri-Valley | San Ramon* | North I-680 |
|---|---|---|---|
| **Class A** | 2,981,144 | 3,785,224 | 11,366,613 |
| A-Vacancy | 23.9% | 13.1% | 19.4% |
| A-Qtr. Net Absorp. | 96,986 | 16,452 | (53,586) |
| A-Asking Rents | $3.33 | $3.23 | $3.39 |
| **Class B** | 6,690,741 | 5,518,115 | 14,711,790 |
| B-Vacancy | 20.5% | 17.8% | 15.8% |
| B-Qtr. Net Absorp. | (97,456) | (52,414) | (145,313) |
| B-Asking Rents | $2.14 | $2.64 | $2.56 |
| **Class C** | 645,357 | 203,785 | 2,716,529 |
| C-Vacancy | 14.5% | 14.9% | 7.5% |
| C-Qtr. Net Absorp. | (1,149) | (8,176) | (36,465) |
| C-Asking Rents | $2.04 | $2.46 | $1.97 |
| **Total** | 10,317,242 | 9,507,124 | 28,794,932 |
| T-Vacancy | 21.1% | 15.8% | 16.5% |
| T-Qtr. Net Absorp. | (1,619) | (44,138) | (235,364) |
| T-Asking Rents | $2.50 | $2.78 | $2.64 |

*Part of the North I-680 market area.
Source: TRI commercial, 3rd Quarter 2021 East Bay Office Report.

The total Tri-Valley office market (not including Bishop Ranch/San Ramon, which lies directly north of this market area as defined by the data source) has over 10.3 million sf, with an average vacancy of 21.1% (vacancy for Class A, B & C buildings combined). The Class A office market has approximately 2,981,000 sf with an even higher 23.9% vacancy. Average office rents in Tri-Valley are $2.50 per sf full-service, which again are less than rent replacement values for new buildings. Average Class A office rents are $3.33 per sf per month.[3]

As Table III-2 below shows, the five-year office absorption trend is negative but the ten-year is positive – over 100,000 SF per year on average.

TABLE III-2. OFFICE ABSORPTION TRENDS

| Year | San Ramon Office | Tri-Valley Office | East Bay Office |
|---|---|---|---|
| 2021 YTD | (131,784) | (388,876) | (1,447,359) |
| 2020 | 66,032 | (85,334) | (2,503,086) |
| 2019 | (22,505) | 454,407 | 1,534,331 |
| 2018 | (72,677) | (49,980) | 643,832 |
| 2017 | (109,916) | (74,656) | (1,554,532) |
| 2016 | (357,271) | 27,133 | 989,074 |
| 2015 | (314,558) | 445,589 | 1,857,264 |
| 2014 | (101,279) | 119,157 | 505,394 |
| 2013 | 230,707 | 218,435 | 1,247,687 |
| 2012 | 171,291 | 389,177 | 1,011,874 |
| **5-Year** | (270,850) | (144,439) | (3,326,814) |
| **10-Year** | (641,960) | 1,055,052 | 2,284,479 |

Source: Edward Del Beccaro, TRI Commercial.

[3] TRI Commercial, 3rd Quarter 2021 East Bay Office Report.

One reason to expect some positive absorption in the future is that Bishop Ranch is tearing down old office buildings and developing major residential. The office market in San Ramon is largely dictated by the dominant player, Bishop Ranch. Remote Work trends, office automation and migration of Finance, Insurance, and Real Estate (FIRE) tenants out of the Bay Area due to extremely high housing costs is creating systemic office vacancies. San Ramon, however, benefits from the migration from Silicon Valley of highly educated tech workers into the residential areas of South I-680. As such, tech companies are looking at space in Tri-Valley and San Ramon with a much higher frequency than for the north I-680 office corridor. Tri-Valley is already the home of several high-tech companies that have migrated west from Silicon Valley, such as Oracle and Workday.

The medical market in San Ramon has, according to one source, 267,000 total sf, with a 3rd quarter 2021 vacancy rate of 15% and an average rental rate of $33.80 per SF per year.[4] Generally, medical office space would be expected to continue to increase, perhaps representing 20% of total office/R&D development in future years.

## *Industrial*

Industrial market data are summarized in Table III-3 below. Industrial space in San Ramon is limited, with several small and medium-size warehouses on both sides of I-680, and available data indicate that vacancies are higher than for the neighboring regions of Tri-Valley and North I-680, but asking rents are also higher.

TABLE III-3. INDUSTRIAL MARKET DATA FOR SAN RAMON AND MARKET AREAS IN REGION

| Industrial | Tri-Valley Market | San Ramon | North I-680 Market |
|---|---|---|---|
| **General Industrial** | 4,953,628 | | 6,863,108 |
| GI-Vacancy | 2.8% | | 7.5% |
| GI-Qtr. Net Absorp. | 311,234 | | (29,578) |
| GI-Asking Rents | $1.26 | | $1.21 |
| **Flex** | 7,189,005 | | 3,752,754 |
| F-Vacancy | 4.7% | | 9.9% |
| F-Qtr. Net Absorp. | 51,073 | | (7,018) |
| F-Asking Rents | $1.66 | | $1.41 |
| **Warehouse** | 12,986,938 | | 16,493,270 |
| W-Vacancy | 7.7% | | 8.8% |
| W-Qtr. Net Absorp. | (31,644) | | (39,132) |
| W-Asking Rents | $1.06 | | $1.24 |
| **Total** | 25,129,571 | 801,000 | 27,109,132 |
| T-Vacancy | 5.9% | 12.7% | 8.6% |
| 12-month Net Absorp. | | 1,300 | |
| T-Qtr. Net Absorp. | 330,663 | | (75,728) |
| T-Asking Rents | $1.33 | $1.61 | $1.29 |

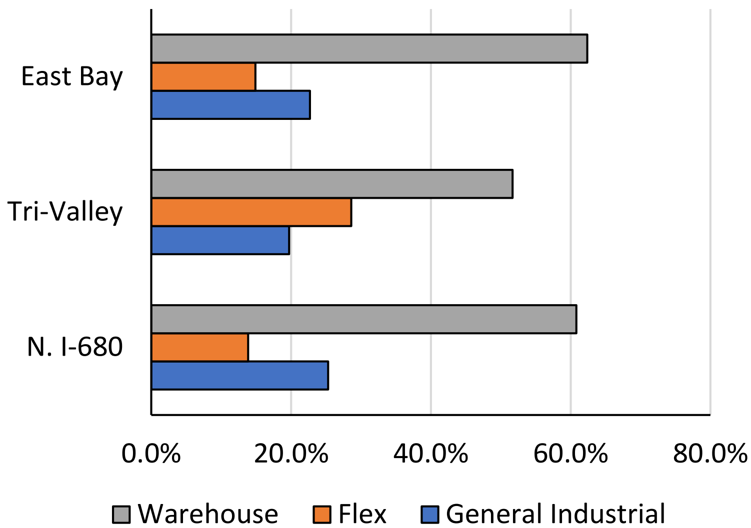
Sources: CoStar Realty Information Inc. via TRI Commercial; TRI Commercial, *3rd Quarter 2021 East Bay Industrial Report*.

[4] CoStar Realty Information Inc., via TRI Commercial.

Tri-Valley, consisting of the cities south of San Ramon, has a total of 25,129,000 sf feet of general industrial, warehouse and flex space, with an average vacancy rate 5.9% and average rental rates of $1.33.[5]

Future industrial development in San Ramon could include a substantial component of R&D/tech activities occupying flex industrial space. As Figure III-1 below, and Table III-3 above, indicate, flex space is a relatively high proportion of total industrial space in the adjacent Tri-Valley market area. Warehouse space is the dominant type by far in all three areas, partly due to its nature as a relatively low-intensity, goods-storage use.

FIGURE III-1. PROPORTIONS OF INDUSTRIAL SPACE TYPES, EAST BAY AND SUB-REGIONS




Source: TRI Commercial, 3rd Quarter 2021 East Bay Industrial Report; TNDG.

## Observations relative to the General Plan update

From the standpoint of capturing additional employment-type uses, San Ramon can continue to benefit from its locational attributes, amenities such as the Iron Horse Trail, and assets such as the existing shuttle system (and a potential future system involving a county-operated shuttle on the Iron Horse Trail right-of-way), and the City's commitment to innovation as exemplified by the program testing autonomous vehicles on public streets.

Some parts of San Ramon, particularly Bishop Ranch because of its scale and other attributes, but also some repurposed shopping centers, could be developed more densely in employment-supporting uses. This would have the effect of making such development more feasible and also help create environments that are more "urban" in the sense of enhancing the potential for mixed uses, being walkable, etc. Density options as well as mixed uses would also be supported by zoning that is more flexible than current.

[5] TRI commercial, 3rd Quarter 2021 East Bay Industrial Report.

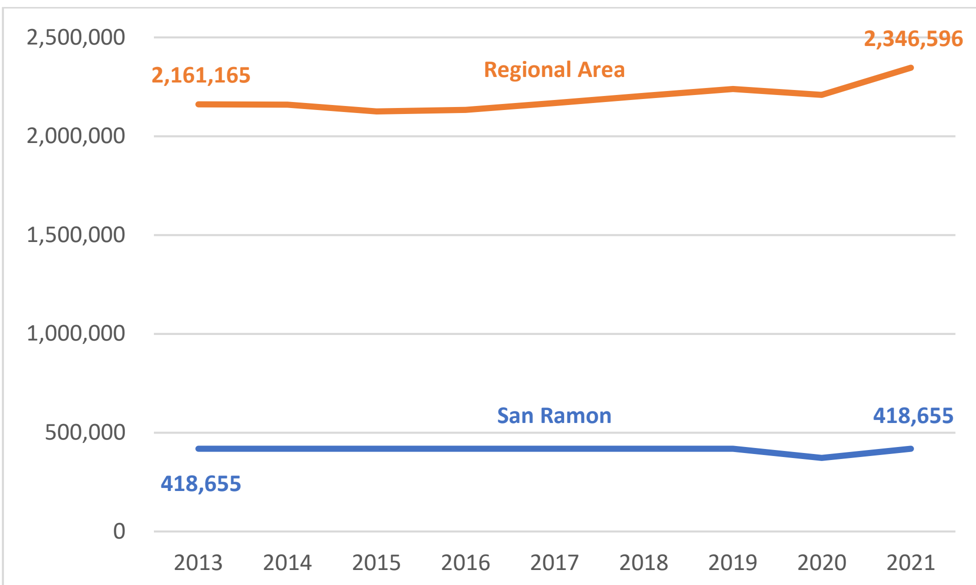
# IV. San Ramon Hotel Market

## *Locational overview*

This analysis provides a statistical overview of the local and regional hotel markets. It includes a range of standard hotel industry performance measures to assess hotel market conditions in the City of San Ramon and the regional surrounding area. The regional market area for purposes of the hotel analysis includes the following cities: Walnut Creek, Danville, Dublin, Pleasanton, Livermore, and San Ramon.

Figure IV-1 shows changes in room supply in both regions between 2013 and 2021. Room supply is defined as the number rooms multiplied by the number of days in a specified time period[6]. As shown in the figure, existing room supply in San Ramon has been relatively constant during this period. In fact, according to data from Smith Travel Research (STR), no new hotel facilities have been developed in nearly 20 years. In the regional area, room supply increased by about 8.6% during this period[7].

FIGURE IV-1: ROOM SUPPLY IN SAN RAMON AND REGIONAL AREA (2013-21)




Source: Smith Travel Research (STR)

[6] Example: 100 rooms in subject hotel x 31 days in the month = Room Supply of 3,100 for the month.
[7] The temporary drop in room supply in 2020 for both geographies is explained by the temporary closure of some hotels.

Figure IV-2 shows occupancy rate trends during the 2013 to 2021 time period for both geographies. Occupancy rates for both regions were relatively consistent for both regions from 2013 to 2019 (with occupancy rates averaging in the mid to high 70s percentage points). The pandemic led to significant declines in occupancy rates in 2020 and 2021 in both regions.

**FIGURE IV-2: OCCUPANCY RATES IN SAN RAMON AND REGIONAL AREA (2013-21)**

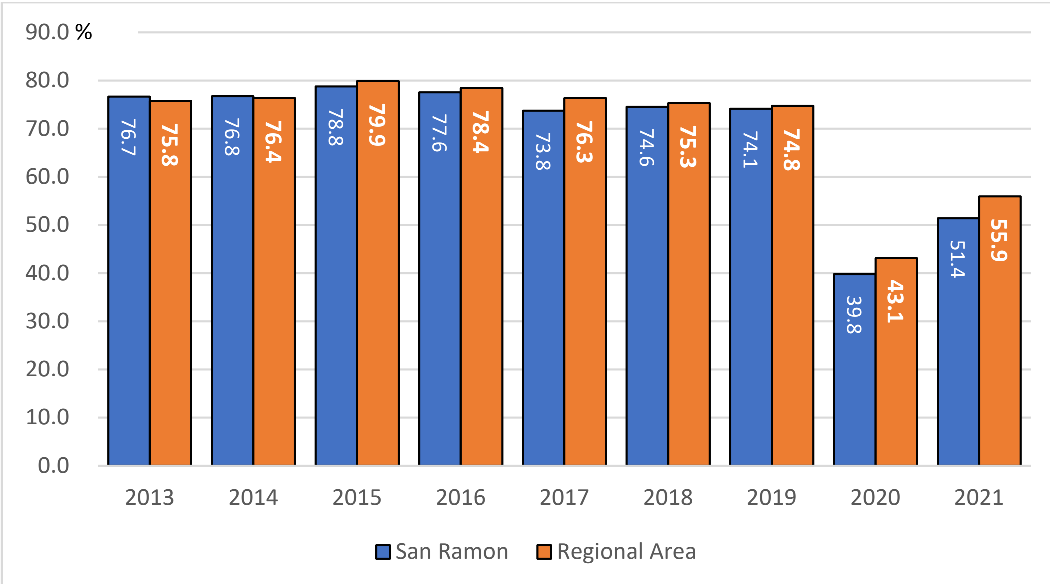


Table IV-1, below, provides a direct comparison of hotel market indicators between San Ramon and the larger regional area in 2013 and 2019[8]. Both regions experienced significant increases in RevPAR and average room rates between 2013 and 2019. Between these two years, room demand slightly declined in San Ramon, while it slightly increased in the benchmark region. In addition, room supply remained constant in San Ramon, while it increased by 3.6% in the benchmark region.

TABLE IV-1. COMPARISON OF HOTEL MARKET INDICATORS – 2013 TO 2019
SAN RAMON AND REGIONAL AREA

| Performance Measure | San Ramon | Region | San Ramon Index Relative to Region |
|---|---|---|---|
| RevPAR in 2013 | $90.95 | $82.62 | 1.10 |
| RevPAR in 2019 | $134.20 | $125.07 | 1.07 |
| Growth in RevPAR, 2013-2019 | 47.6% | 51.4% | 0.93 |
| | | | |
| Average Room Rate in 2013 | $118.61 | $109.05 | 1.09 |
| Average Room Rate in 2019 | $181.07 | $167.32 | 1.08 |
| Growth in Average Room Rate, 2013-2019 | 52.7% | 53.4% | 0.99 |
| | | | |
| Occupancy Rate in 2013 | 76.7 | 75.8 | 1.01 |
| Occupancy Rate in 2019 | 74.1 | 74.8 | 0.99 |
| Change in Occupancy Rate, 2013-2019 | -2.6 | -1.0 | UND |
| | | | |
| Annual Room Demand in 2013 | 321,035 | 1,637,313 | N/A |
| Annual Room Demand in 2019 | 310,299 | 1,673,363 | N/A |
| Growth in Room Demand, 2013-2019 | -3.3% | 2.2% | -1.52 |
| | | | |
| Annual Room Supply in 2013 | 418,655 | 2,161,165 | N/A |
| Annual Room Supply in 2019 | 418,655 | 2,238,596 | N/A |
| Growth in Room Inventory, 2013-2019 | 0.0% | 3.6% | 0.00 |
| | | | |
| INDICES: | | | |
| Change in CPI, 2013-2019 | 9.7% | 9.7% | N/A |
| Population Growth, 2013-2019 | 7.2% | 9.5% | 0.75 |
| | | | |

CPI = Consumer Price Index
Source: STR; TNDG; U.S. Dept. of Labor, Bureau of Labor Statistics (BLS); U.S. Census Bureau.

[8] 2019 is provided end year for this comparison in order to remove distortions from the pandemic.

## *Long-range demand projections*

Table IV-2, on the following page, provides a projection of future hotel demand through 2040 in the City of San Ramon. The table provides the following key variables:

- *Room Night Demand* – shows the number of rooms sold in both geographies for the entire year. For example, if 100 hotel rooms were occupied for 300 days of the year, demand would equal 30,000 (300 x 100 = 30,000). Year 2023 demand is projected to equal 2018 room demand, assuming a lag in full recovery for the full hospitality sector as the economy recovers from the pandemic. Starting in 2024, demand is projected to grow at a 0.5% annual rate, in line with historical growth trends prior to the pandemic.

- *San Ramon Share of Benchmark Region* – shows the share of benchmark region demand accounted for in the San Ramon. For 2023, San Ramon is projected to capture 18.8% of room night demand in the benchmark region (the same share as in 2018). For 2024 on, San Ramon is projected to capture 20% of the benchmark region demand, which is closer to historical trends for the region.

- *San Ramon Room Night Demand (projected)* – shows the projected room night demand in San Ramon by applying the share factors to the projected room night demand. The table shows that room night demand is projected increase by about 15.7% from 2023 to 2040.

- *San Ramon Room Night Supply* – shows the number of hotel rooms in all hotels in San Ramon multiplied by 365 days, providing the potential room night supply in the City. This number is based on the 2021-year end supply of hotel rooms in San Ramon.

- *San Ramon Occupancy Rate (projected)* – is calculated by projected room night demand by room night supply.

- *Unmet Room Night Demand at 75% occupancy* – shows the potential support for new room night demand assuming an equilibrium 75% occupancy rate. This new demand projection is calculated by applying the 75% equilibrium occupancy rate assumption to room night supply, and then subtracting this number from projected demand. The table shows that unmet room demand increases in line with the projected occupancy rate.

- *New Rooms Supportable* – is calculated by dividing the unmet room demand projections by the number of days in one year (365), to convert room night demand to equivalent room demand.

TABLE IV-2. HOTEL ROOM DEMAND PROJECTIONS (CUMULATIVE) THROUGH 2035
SAN RAMON

| Variable | 2023 | 2025 | 2030 | 2035 | 2040 |
|---|---|---|---|---|---|
| *Room Night Demand* | | | | | |
| Larger regional area | 1,659,327 | 1,667,624 | 1,718,282 | 1,726,873 | 1,735,508 |
| San Ramon | 312,172 | 313,733 | 323,263 | 324,880 | 326,504 |
| San Ramon Share of Benchmark Region | 18.8% | 20.0% | 20.0% | 20.0% | 20.0% |
| San Ramon Room Night Demand (projected) | 312,172 | 333,525 | 335,192 | 336,868 | 338,553 |
| San Ramon Room Night Supply | 418,655 | 418,655 | 418,655 | 418,655 | 418,655 |
| San Ramon Occupancy Rate (projected) | 75% | 80% | 82% | 84% | 86% |
| Unmet Room Night Demand at 75% occupancy | 0 | 21,201 | 22,877 | 24,561 | 26,254 |
| New Rooms Supportable | 0 | 58 | 81 | 105 | 129 |

Source: TNDG; STR.

## APPENDIX A

## Retail Demand Model (Baseline Scenario)

**Table A-1**
**Population Estimates and Projections**
**San Ramon Retail Trade Area**

| Area | 2019 | 2020 | 2021 | 2025 | 2026 | 2030 | 2035 | 2040 |
|---|---|---|---|---|---|---|---|---|
| Primary Market Area | 93,281 | 94,140 | 95,007 | 98,555 | 99,463 | 100,787 | 103,807 | 106,990 |
| Secondary Market Area | 42,870 | 43,092 | 43,315 | 44,219 | 44,448 | 45,376 | 46,563 | 47,781 |
| Total | 136,151 | 137,232 | 138,322 | 142,774 | 143,911 | 146,163 | 150,369 | 154,771 |

Source: ESRI; ABAG; TNDG.

**Table A-2**
**Per Capita Income Projections**
**San Ramon Retail Trade Area**
**In constant dollars**

| | 2021 | |
|---|---|---|
| **Money income** | | |
| Primary Market Area | $75,248 | |
| Secondary Market Area | $89,632 | |
| Annual Increase Factor | 2.00% | 2019-2020 only |

| Area | 2019 | 2020 | 2021 | 2025 | 2026 | 2030 | 2035 | 2040 |
|---|---|---|---|---|---|---|---|---|
| Primary Market Area | $72,377 | $73,825 | $75,248 | $81,451 | $83,080 | $89,928 | $99,288 | $109,622 |
| Secondary Market Area | $86,213 | $87,937 | $89,632 | $97,021 | $98,961 | $107,119 | $118,268 | $130,577 |

Source: ESRI; TNDG.

**Table A-3**
**Total Income and Potential Retail Sales Projections**
**San Ramon Retail Trade Area**
**In thousands of constant dollars**

| Area | 2019 | 2020 | 2021 | 2025 | 2026 | 2030 | 2035 | 2040 |
|---|---|---|---|---|---|---|---|---|
| ***Percent of Income Spent on Retail:*** | | | | | | | | |
| Primary Market Area | 23.2% | 23.2% | 23.2% | 23.2% | 23.2% | 23.2% | 23.2% | 23.2% |
| Secondary Market Area | 22.2% | 22.2% | 22.2% | 22.2% | 22.2% | 22.2% | 22.2% | 22.2% |
| ***Total Income:*** | | | | | | | | |
| Primary Market Area | $6,751,429 | $6,949,877 | $7,149,087 | $8,027,420 | $8,263,373 | $9,063,601 | $10,306,759 | $11,728,508 |
| Secondary Market Area | $3,695,941 | $3,789,379 | $3,882,410 | $4,290,157 | $4,398,617 | $4,860,579 | $5,506,844 | $6,239,036 |
| Total | $10,447,371 | $10,739,255 | $11,031,497 | $12,317,578 | $12,661,991 | $13,924,180 | $15,813,602 | $17,967,544 |
| ***Potential Retail Sales:*** | | | | | | | | |
| Primary Market Area | $1,566,332 | $1,612,371 | $1,658,588 | $1,862,362 | $1,917,103 | $2,102,755 | $2,391,168 | $2,721,014 |
| Secondary Market Area | $820,499 | $841,242 | $861,895 | $952,415 | $976,493 | $1,079,048 | $1,222,519 | $1,385,066 |
| Total | $2,386,831 | $2,453,613 | $2,520,483 | $2,814,776 | $2,893,596 | $3,181,804 | $3,613,687 | $4,106,080 |

Source: TNDG.

**Table A-4**
**Distribution of Retail Sales by Retail Category**
**San Ramon Retail Trade Area**

| Retail Category | 2019 | %Distribution 2020 | %Distribution 2021 | %Distribution 2025 | %Distribution 2026 | %Distribution 2030 | %Distribution 2035 | %Distribution 2040 |
|---|---|---|---|---|---|---|---|---|
| *Shopper Goods:* | | | | | | | | |
| Clothing and Clothing Accessories | 7.0% | 7.0% | 7.0% | 7.0% | 7.0% | 7.0% | 7.0% | 7.0% |
| General Merchandise | 13.0% | 13.0% | 13.0% | 13.0% | 13.0% | 13.0% | 13.0% | 13.0% |
| Home Furnishings and Appliances | 5.0% | 5.0% | 5.0% | 5.0% | 5.0% | 5.0% | 5.0% | 5.0% |
| Specialty/Other | 13.0% | 13.0% | 13.0% | 13.0% | 13.0% | 13.0% | 13.0% | 13.0% |
| Subtotal | 38.0% | 38.0% | 38.0% | 38.0% | 38.0% | 38.0% | 38.0% | 38.0% |
| *Convenience Goods:* | | | | | | | | |
| Food and Beverage | 15.0% | 15.0% | 15.0% | 15.0% | 15.0% | 15.0% | 15.0% | 15.0% |
| Food Service and Drinking | 15.0% | 15.0% | 15.0% | 15.0% | 15.0% | 15.0% | 15.0% | 15.0% |
| Subtotal | 30.0% | 30.0% | 30.0% | 30.0% | 30.0% | 30.0% | 30.0% | 30.0% |
| *Heavy Commercial Goods:* | | | | | | | | |
| Bldg. Matrl. and Garden Equip. and Supplies | 7.0% | 7.0% | 7.0% | 7.0% | 7.0% | 7.0% | 7.0% | 7.0% |
| Motor Vehicle and Parts Dealers | 15.0% | 15.0% | 15.0% | 15.0% | 15.0% | 15.0% | 15.0% | 15.0% |
| Gasoline Stations | 10.0% | 10.0% | 10.0% | 10.0% | 10.0% | 10.0% | 10.0% | 10.0% |
| Subtotal | 32.0% | 32.0% | 32.0% | 32.0% | 32.0% | 32.0% | 32.0% | 32.0% |
| Total | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% |

Source: TNDG, based on historic trends (2019 taxable sales) reported by the California Department of Tax and Fee Administration for Contra Costa County and California.

**Table A-5**
**Projected Demand for Retail Sales by Major Retail Category**
**San Ramon Retail Trade Area - Primary Market Area**
**In thousands of constant dollars**

| Retail Category | 2019 | 2020 | 2021 | 2025 | 2026 | 2030 | 2035 | 2040 |
|---|---|---|---|---|---|---|---|---|
| *Shopper Goods:* | | | | | | | | |
| Clothing and Clothing Accessories | $109,643 | $112,866 | $116,101 | $130,365 | $134,197 | $147,193 | $167,382 | $190,471 |
| General Merchandise | 203,623 | 209,608 | 215,616 | 242,107 | 249,223 | 273,358 | 310,852 | 353,732 |
| Home Furnishings and Appliances | 78,317 | 80,619 | 82,929 | 93,118 | 95,855 | 105,138 | 119,558 | 136,051 |
| Specialty/Other | 203,623 | 209,608 | 215,616 | 242,107 | 249,223 | 273,358 | 310,852 | 353,732 |
| Subtotal | $595,206 | $612,701 | $630,263 | $707,697 | $728,499 | $799,047 | $908,644 | $1,033,985 |
| *Convenience Goods:* | | | | | | | | |
| Food and Beverage | $234,950 | $241,856 | $248,788 | $279,354 | $287,565 | $315,413 | $358,675 | $408,152 |
| Food Service and Drinking | 234,950 | 241,856 | 248,788 | 279,354 | 287,565 | 315,413 | 358,675 | 408,152 |
| Subtotal | $469,899 | $483,711 | $497,576 | $558,708 | $575,131 | $630,827 | $717,350 | $816,304 |
| *Heavy Commercial Goods:* | | | | | | | | |
| Bldg. Matrl. and Garden Equip. and Supplies | $109,643 | $112,866 | $116,101 | $130,365 | $134,197 | $147,193 | $167,382 | $190,471 |
| Motor Vehicle and Parts Dealers | 234,950 | 241,856 | 248,788 | 279,354 | 287,565 | 315,413 | 358,675 | 408,152 |
| Gasoline Stations | 156,633 | 161,237 | 165,859 | 186,236 | 191,710 | 210,276 | 239,117 | 272,101 |
| Subtotal | $501,226 | $515,959 | $530,748 | $595,956 | $613,473 | $672,882 | $765,174 | $870,724 |
| Total | $1,566,332 | $1,612,371 | $1,658,588 | $1,862,362 | $1,917,103 | $2,102,755 | $2,391,168 | $2,721,014 |

Source: TNDG.

**Table A-6**
**Projected Demand for Retail Sales by Major Retail Category**
**San Ramon Retail Trade Area - Secondary Market Area**
**In thousands of constant dollars**

| Retail Category | 2019 | 2020 | 2021 | 2025 | 2026 | 2030 | 2035 | 2040 |
|---|---|---|---|---|---|---|---|---|
| *Shopper Goods:* | | | | | | | | |
| Clothing and Clothing Accessories | $57,435 | $58,887 | $60,333 | $66,669 | $68,355 | $75,533 | $85,576 | $96,955 |
| General Merchandise | 106,665 | 109,361 | 112,046 | 123,814 | 126,944 | 140,276 | 158,928 | 180,059 |
| Home Furnishings and Appliances | 41,025 | 42,062 | 43,095 | 47,621 | 48,825 | 53,952 | 61,126 | 69,253 |
| Specialty/Other | 106,665 | 109,361 | 112,046 | 123,814 | 126,944 | 140,276 | 158,928 | 180,059 |
| Subtotal | $311,790 | $319,672 | $327,520 | $361,918 | $371,067 | $410,038 | $464,557 | $526,325 |
| *Convenience Goods:* | | | | | | | | |
| Food and Beverage | $123,075 | $126,186 | $129,284 | $142,862 | $146,474 | $161,857 | $183,378 | $207,760 |
| Food Service and Drinking | 123,075 | 126,186 | 129,284 | 142,862 | 146,474 | 161,857 | 183,378 | 207,760 |
| Subtotal | $246,150 | $252,373 | $258,569 | $285,724 | $292,948 | $323,715 | $366,756 | $415,520 |
| *Heavy Commercial Goods:* | | | | | | | | |
| Bldg. Matrl. and Garden Equip. and Supplies | $57,435 | $58,887 | $60,333 | $66,669 | $68,355 | $75,533 | $85,576 | $96,955 |
| Motor Vehicle and Parts Dealers | 123,075 | 126,186 | 129,284 | 142,862 | 146,474 | 161,857 | 183,378 | 207,760 |
| Gasoline Stations | 82,050 | 84,124 | 86,190 | 95,241 | 97,649 | 107,905 | 122,252 | 138,507 |
| Subtotal | $262,560 | $269,197 | $275,806 | $304,773 | $312,478 | $345,296 | $391,206 | $443,221 |
| Total | $820,499 | $841,242 | $861,895 | $952,415 | $976,493 | $1,079,048 | $1,222,519 | $1,385,066 |

Source: TNDG.

**Table A-7**
**Potential Capture of Market Area Demand for Retail Sales Expressed in Percentages**
**San Ramon Retail Trade Area - Primary Market Area**

| Retail Category | 2019 | 2020 | 2021 | 2025 | 2026 | 2030 | 2035 | 2040 |
|---|---|---|---|---|---|---|---|---|
| *Shopper Goods:* | | | | | | | | |
| Clothing and Clothing Accessories | 20.0% | 20.0% | 20.0% | 20.0% | 20.0% | 20.0% | 20.0% | 20.0% |
| General Merchandise | 35.0% | 35.0% | 35.0% | 35.0% | 35.0% | 35.0% | 35.0% | 35.0% |
| Home Furnishings and Appliances | 43.0% | 43.0% | 43.0% | 43.0% | 43.0% | 43.0% | 43.0% | 43.0% |
| Specialty/Other | 43.0% | 43.0% | 43.0% | 43.0% | 43.0% | 43.0% | 43.0% | 43.0% |
| *Convenience Goods:* | | | | | | | | |
| Food and Beverage | 89.0% | 89.0% | 89.0% | 89.0% | 89.0% | 89.0% | 89.0% | 89.0% |
| Food Service and Drinking | 56.0% | 56.0% | 56.0% | 56.0% | 56.0% | 56.0% | 56.0% | 56.0% |
| *Heavy Commercial Goods:* | | | | | | | | |
| Bldg. Matrl. and Garden Equip. and Supplies | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% |
| Motor Vehicle and Parts Dealers | 17.0% | 17.0% | 17.0% | 17.0% | 17.0% | 17.0% | 17.0% | 17.0% |
| Gasoline Stations | 59.0% | 59.0% | 59.0% | 59.0% | 59.0% | 59.0% | 59.0% | 59.0% |

Source: TNDG.

**Table A-8**
**Potential Capture of Market Area Demand for Retail Sales Expressed in Percentages**
**San Ramon Retail Trade Area - Secondary Market Area**

| Retail Category | 2019 | 2020 | 2021 | 2025 | 2026 | 2030 | 2035 | 2040 |
|---|---|---|---|---|---|---|---|---|
| *Shopper Goods:* | | | | | | | | |
| Clothing and Clothing Accessories | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| General Merchandise | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| Home Furnishings and Appliances | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| Specialty/Other | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| *Convenience Goods:* | | | | | | | | |
| Food and Beverage | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| Food Service and Drinking | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| *Heavy Commercial Goods:* | | | | | | | | |
| Bldg. Matrl. and Garden Equip. and Supplies | 15.0% | 15.0% | 15.0% | 15.0% | 15.0% | 15.0% | 15.0% | 15.0% |
| Motor Vehicle and Parts Dealers | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| Gasoline Stations | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |

Source: TNDG.

**Table A-9**
**Potential Capture of Market Area Demand for Retail Sales**
**San Ramon Retail Trade Area - Primary Market Area**
**In thousands of constant dollars**

| **Retail Category** | **2019** | **2020** | **2021** | **2025** | **2026** | **2030** | **2035** | **2040** |
|---|---|---|---|---|---|---|---|---|
| *Shopper Goods:* | | | | | | | | |
| Clothing and Clothing Accessories | $21,929 | $22,573 | $23,220 | $26,073 | $26,839 | $29,439 | $33,476 | $38,094 |
| General Merchandise | 71,268 | 73,363 | 75,466 | 84,737 | 87,228 | 95,675 | 108,798 | 123,806 |
| Home Furnishings and Appliances | 33,676 | 34,666 | 35,660 | 40,041 | 41,218 | 45,209 | 51,410 | 58,502 |
| Specialty/Other | 87,558 | 90,132 | 92,715 | 104,106 | 107,166 | 117,544 | 133,666 | 152,105 |
| Subtotal | $214,431 | $220,734 | $227,061 | $254,957 | $262,451 | $287,867 | $327,351 | $372,507 |
| *Convenience Goods:* | | | | | | | | |
| Food and Beverage | $209,105 | $215,252 | $221,422 | $248,625 | $255,933 | $280,718 | $319,221 | $363,255 |
| Food Service and Drinking | 131,572 | 135,439 | 139,321 | 156,438 | 161,037 | 176,631 | 200,858 | 228,565 |
| Subtotal | $340,677 | $350,691 | $360,743 | $405,064 | $416,970 | $457,349 | $520,079 | $591,820 |
| *Heavy Commercial Goods:* | | | | | | | | |
| Bldg. Matrl. and Garden Equip. and Supplies | $109,643 | $112,866 | $116,101 | $130,365 | $134,197 | $147,193 | $167,382 | $190,471 |
| Motor Vehicle and Parts Dealers | 39,941 | 41,115 | 42,294 | 47,490 | 48,886 | 53,620 | 60,975 | 69,386 |
| Gasoline Stations | 92,414 | 95,130 | 97,857 | 109,879 | 113,109 | 124,063 | 141,079 | 160,540 |
| Subtotal | $241,998 | $249,111 | $256,252 | $287,735 | $296,192 | $324,876 | $369,435 | $420,397 |
| Total | $797,106 | $820,536 | $844,055 | $947,756 | $975,614 | $1,070,092 | $1,216,865 | $1,384,724 |

Source: TNDG.

**Table A-10**
**Potential Capture of Market Area Demand for Retail Sales**
**San Ramon Retail Trade Area - Secondary Market Area**
**In thousands of constant dollars**

| **Retail Category** | **2019** | **2020** | **2021** | **2025** | **2026** | **2030** | **2035** | **2040** |
|---|---|---|---|---|---|---|---|---|
| *Shopper Goods:* | | | | | | | | |
| Clothing and Clothing Accessories | $0 | $0 | $0 | $0 | $0 | $0 | $0 | $0 |
| General Merchandise | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| Home Furnishings and Appliances | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| Specialty/Other | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| Subtotal | $0 | $0 | $0 | $0 | $0 | $0 | $0 | $0 |
| *Convenience Goods:* | | | | | | | | |
| Food and Beverage | $0 | $0 | $0 | $0 | $0 | $0 | $0 | $0 |
| Food Service and Drinking | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| Subtotal | $0 | $0 | $0 | $0 | $0 | $0 | $0 | $0 |
| *Heavy Commercial Goods:* | | | | | | | | |
| Bldg. Matrl. and Garden Equip. and Supplies | $8,615 | $8,833 | $9,050 | $10,000 | $10,253 | $11,330 | $12,836 | $14,543 |
| Motor Vehicle and Parts Dealers | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| Gasoline Stations | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| Subtotal | $8,615 | $8,833 | $9,050 | $10,000 | $10,253 | $11,330 | $12,836 | $14,543 |
| Total | $8,615 | $8,833 | $9,050 | $10,000 | $10,253 | $11,330 | $12,836 | $14,543 |

Source: TNDG.

**Table A-11**
**Potential Capture of Market Area Demand for Retail Sales**
**San Ramon Retail Trade Area - All Market Areas Combined**
**In thousands of constant dollars**

| **Retail Category** | **2019** | **2020** | **2021** | **2025** | **2026** | **2030** | **2035** | **2040** |
|---|---|---|---|---|---|---|---|---|
| *Shopper Goods:* | | | | | | | | |
| Clothing and Clothing Accessories | $21,929 | $22,573 | $23,220 | $26,073 | $26,839 | $29,439 | $33,476 | $38,094 |
| General Merchandise | 71,268 | 73,363 | 75,466 | 84,737 | 87,228 | 95,675 | 108,798 | 123,806 |
| Home Furnishings and Appliances | 33,676 | 34,666 | 35,660 | 40,041 | 41,218 | 45,209 | 51,410 | 58,502 |
| Specialty/Other | 87,558 | 90,132 | 92,715 | 104,106 | 107,166 | 117,544 | 133,666 | 152,105 |
| Subtotal | $214,431 | $220,734 | $227,061 | $254,957 | $262,451 | $287,867 | $327,351 | $372,507 |
| *Convenience Goods:* | | | | | | | | |
| Food and Beverage | $209,105 | $215,252 | $221,422 | $248,625 | $255,933 | $280,718 | $319,221 | $363,255 |
| Food Service and Drinking | 131,572 | 135,439 | 139,321 | 156,438 | 161,037 | 176,631 | 200,858 | 228,565 |
| Subtotal | $340,677 | $350,691 | $360,743 | $405,064 | $416,970 | $457,349 | $520,079 | $591,820 |
| *Heavy Commercial Goods:* | | | | | | | | |
| Bldg. Matrl. and Garden Equip. and Supplies | $118,258 | $121,699 | $125,151 | $140,366 | $144,450 | $158,523 | $180,218 | $205,014 |
| Motor Vehicle and Parts Dealers | 39,941 | 41,115 | 42,294 | 47,490 | 48,886 | 53,620 | 60,975 | 69,386 |
| Gasoline Stations | 92,414 | 95,130 | 97,857 | 109,879 | 113,109 | 124,063 | 141,079 | 160,540 |
| Subtotal | $250,613 | $257,944 | $265,302 | $297,735 | $306,446 | $336,206 | $382,272 | $434,940 |
| Total | $805,721 | $829,369 | $853,105 | $957,756 | $985,867 | $1,081,422 | $1,229,702 | $1,399,267 |

Source: TNDG.

**Table A-12**
**"Extra" Daytime Population with Employment Pattern**
**San Ramon Retail Trade Area**

| **Retail Category** | **Factor** |
|---|---|
| *Shopper Goods:* | |
| Clothing and Clothing Accessories | 1.00 |
| General Merchandise | 1.00 |
| Home Furnishings and Appliances | 1.00 |
| Specialty/Other | 1.00 |
| | |
| *Convenience Goods:* | |
| Food and Beverage | 1.00 |
| Food Services and Drinking | 1.00 |
| | |
| *Heavy Commercial Goods:* | |
| Bldg. Matrl. and Garden Equip. and Supplies | 1.00 |
| Motor Vehicle and Parts Dealers | 1.00 |
| Gasoline Stations | 1.00 |

Source: TNDG.

**Table A-13**
**Potential Capture of Market Area Demand for Retail Sales**
**San Ramon Retail Trade Area - Resident and Tourist/Visitor Demand Combined**
**In thousands of constant dollars**

| **Retail Category** | **2019** | **2020** | **2021** | **2025** | **2026** | **2030** | **2035** | **2040** |
|---|---|---|---|---|---|---|---|---|
| *Shopper Goods:* | | | | | | | | |
| Clothing and Clothing Accessories | $21,929 | $22,573 | $23,220 | $26,073 | $26,839 | $29,439 | $33,476 | $38,094 |
| General Merchandise | 71,268 | 73,363 | 75,466 | 84,737 | 87,228 | 95,675 | 108,798 | 123,806 |
| Home Furnishings and Appliances | 33,676 | 34,666 | 35,660 | 40,041 | 41,218 | 45,209 | 51,410 | 58,502 |
| Specialty/Other | 87,558 | 90,132 | 92,715 | 104,106 | 107,166 | 117,544 | 133,666 | 152,105 |
| Subtotal | $214,431 | $220,734 | $227,061 | $254,957 | $262,451 | $287,867 | $327,351 | $372,507 |
| *Convenience Goods:* | | | | | | | | |
| Food and Beverage | $209,105 | $215,252 | $221,422 | $248,625 | $255,933 | $280,718 | $319,221 | $363,255 |
| Food Service and Drinking | 131,572 | 135,439 | 139,321 | 156,438 | 161,037 | 176,631 | 200,858 | 228,565 |
| Subtotal | $340,677 | $350,691 | $360,743 | $405,064 | $416,970 | $457,349 | $520,079 | $591,820 |
| *Heavy Commercial Goods:* | | | | | | | | |
| Bldg. Matrl. and Garden Equip. and Supplies | $118,258 | $121,699 | $125,151 | $140,366 | $144,450 | $158,523 | $180,218 | $205,014 |
| Motor Vehicle and Parts Dealers | 39,941 | 41,115 | 42,294 | 47,490 | 48,886 | 53,620 | 60,975 | 69,386 |
| Gasoline Stations | 92,414 | 95,130 | 97,857 | 109,879 | 113,109 | 124,063 | 141,079 | 160,540 |
| Subtotal | $250,613 | $257,944 | $265,302 | $297,735 | $306,446 | $336,206 | $382,272 | $434,940 |
| Total | $805,721 | $829,369 | $853,105 | $957,756 | $985,867 | $1,081,422 | $1,229,702 | $1,399,267 |

Source: TNDG.

**Table A-14**
**Comparison of Potential Retail Demand with Estimated Sales**
**City of San Ramon**
**in thousands of constant dollars**
**(Using 2019 figures to avoid Covid distortions)**

| **Retail Category** | **2019 Demand** | **2019 Estimated Sales** | **Expected Less Actual** | **Percent Actual/ Expected** |
|---|---|---|---|---|
| *Shopper Goods:* | | | | |
| Clothing and Clothing Accessories | $21,929 | $21,707 | $221 | 99.0% |
| General Merchandise | $71,268 | 71,378 | (110) | 100.2% |
| Home Furnishings and Appliances | $33,676 | 33,879 | (203) | 100.6% |
| Specialty/Other | $87,558 | 88,321 | (763) | 100.9% |
| Subtotal | $214,431 | $215,286 | ($855) | 100.4% |
| *Convenience Goods:* | | | | |
| Food and Beverage | $209,105 | $208,933 | $172 | 99.9% |
| Food Service and Drinking | $131,572 | 132,721 | (1,149) | 100.9% |
| Subtotal | $340,677 | $341,654 | ($977) | 100.3% |
| *Heavy Commercial Goods:* | | | | |
| Bldg. Matrl. and Garden Equip. and Supplies | $118,258 | $118,315 | ($57) | 100.0% |
| Motor Vehicle and Parts Dealers | $39,941 | 39,259 | 683 | 98.3% |
| Gasoline Stations | $92,414 | 92,081 | 333 | 99.6% |
| Subtotal | $250,613 | $249,655 | $959 | 99.6% |
| Total | $805,721 | $806,594 | ($873) | 100.1% |

Source: CDTFA; TNDG.

**Table A-15**
**Net New Supportable Retail Sales (based on 2019 existing sales)**
**City of San Ramon**
**in thousands of constant dollars**

| Retail Category | 2019 | 2020 | 2021 | 2025 | 2026 | 2030 | 2035 | 2040 |
|---|---|---|---|---|---|---|---|---|
| *Shopper Goods:* | | | | | | | | |
| Clothing and Clothing Accessories | $221 | $866 | $1,513 | $4,366 | $5,132 | $7,731 | $11,769 | $16,387 |
| General Merchandise | (110) | 1,985 | 4,087 | 13,359 | 15,850 | 24,297 | 37,420 | 52,428 |
| Home Furnishings and Appliances | (203) | 787 | 1,781 | 6,162 | 7,339 | 11,330 | 17,531 | 24,623 |
| Specialty/Other | (763) | 1,810 | 4,394 | 15,785 | 18,845 | 29,223 | 45,345 | 63,784 |
| Subtotal | ($855) | $5,448 | $11,775 | $39,672 | $47,166 | $72,582 | $112,065 | $157,221 |
| *Convenience Goods:* | | | | | | | | |
| Food and Beverage | $172 | $6,318 | $12,488 | $39,692 | $47,000 | $71,785 | $110,288 | $154,322 |
| Food Service and Drinking | (1,149) | 2,718 | 6,600 | 23,717 | 28,316 | 43,910 | 68,137 | 95,844 |
| Subtotal | ($977) | $9,037 | $19,089 | $63,409 | $75,316 | $115,695 | $178,425 | $250,166 |
| *Heavy Commercial Goods:* | | | | | | | | |
| Bldg. Matrl. and Garden Equip. and Supplies | ($57) | $3,384 | $6,836 | $22,050 | $26,135 | $40,208 | $61,903 | $86,699 |
| Motor Vehicle and Parts Dealers | 683 | 1,857 | 3,035 | 8,231 | 9,627 | 14,362 | 21,716 | 30,127 |
| Gasoline Stations | 333 | 3,049 | 5,776 | 17,799 | 21,028 | 31,982 | 48,998 | 68,459 |
| Subtotal | $959 | $8,290 | $15,647 | $48,081 | $56,791 | $86,551 | $132,617 | $185,285 |
| Total | ($873) | $22,774 | $46,511 | $151,162 | $179,272 | $274,828 | $423,107 | $592,673 |

Source: TNDG.

**Table A-16**
**Sales Per Square Foot Standards**
**San Ramon Retail Trade Area**
**Expressed in Sales/Square Feet**

| Retail Category | Sales/Square Feet |
|---|---|
| GAFO* | $350 |
| Food and Beverage | $600 |
| Food Service and Drinking | $600 |
| Bldg. Matrl. and Garden Equip. and Supplies | $325 |
| Automotive Parts | $200 |

*GAFO: General Merchandise, Apparel, Furniture/Appliances, Other/Specialty

Source: Retail Maxim; Urban Land Institute (ULI); TNDG.

**Table A-17**
**Net Demand for Retail Space**
**City of San Ramon**
**Expressed in Square Feet**

| **Retail Category** | **2019** | **2020** | **2021** | **2025** | **2026** | **2030** | **2035** | **2040** |
|---|---|---|---|---|---|---|---|---|
| *Shopper Goods:* | | | | | | | | |
| GAFO | (2,442) | 15,566 | 33,643 | 113,348 | 134,759 | 207,376 | 320,186 | 449,203 |
| *Convenience Goods:* | | | | | | | | |
| Food and Beverage | 287 | 10,531 | 20,814 | 66,153 | 78,333 | 119,641 | 183,813 | 257,203 |
| Food Service and Drinking | (1,915) | 4,530 | 11,001 | 39,529 | 47,193 | 73,184 | 113,562 | 159,740 |
| Subtotal | (1,629) | 15,061 | 31,814 | 105,682 | 125,526 | 192,825 | 297,375 | 416,944 |
| *Heavy Commercial Goods:* | | | | | | | | |
| Bldg. Matrl. and Garden Equip. and Supplies | (175) | 10,412 | 21,033 | 67,848 | 80,416 | 123,716 | 190,471 | 266,766 |
| Automotive Parts* | 307 | 836 | 1,366 | 3,704 | 4,332 | 6,463 | 9,772 | 13,557 |
| Gasoline Stations | N/A | N/A | N/A | N/A | N/A | N/A | N/A | N/A |
| Subtotal | 133 | 11,247 | 22,399 | 71,552 | 84,748 | 130,179 | 200,243 | 280,323 |
| ***Total Retail Space*** | ***(3,938)*** | ***41,874*** | ***87,857*** | ***290,582*** | ***345,033*** | ***530,380*** | ***817,804*** | ***1,146,470*** |

*Assumes that automotive parts stores account for 9% of sales in overall Automotive group category (based on statewide average).

Source: TNDG.

## APPENDIX B

## Retail Demand Model (Leakage-Recapture Scenario)

**Table B-1**
**Population Estimates and Projections**
**San Ramon Retail Trade Area**

| Area | 2019 | 2020 | 2021 | 2025 | 2026 | 2030 | 2035 | 2040 |
|---|---|---|---|---|---|---|---|---|
| Primary Market Area | 93,281 | 94,140 | 95,007 | 98,555 | 99,463 | 100,787 | 103,807 | 106,990 |
| Secondary Market Area | 42,870 | 43,092 | 43,315 | 44,219 | 44,448 | 45,376 | 46,563 | 47,781 |
| Total | 136,151 | 137,232 | 138,322 | 142,774 | 143,911 | 146,163 | 150,369 | 154,771 |

Source: ESRI; ABAG; TNDG.

**Table B-2**
**Per Capita Income Projections**
**San Ramon Retail Trade Area**
**In constant dollars**

| | 2021 | |
|---|---|---|
| **Money income** | | |
| Primary Market Area | $75,248 | |
| Secondary Market Area | $89,632 | |
| Annual Increase Factor | 2.00% | 2019-2020 only |

| Area | 2019 | 2020 | 2021 | 2025 | 2026 | 2030 | 2035 | 2040 |
|---|---|---|---|---|---|---|---|---|
| Primary Market Area | $72,377 | $73,825 | $75,248 | $81,451 | $83,080 | $89,928 | $99,288 | $109,622 |
| Secondary Market Area | $86,213 | $87,937 | $89,632 | $97,021 | $98,961 | $107,119 | $118,268 | $130,577 |

Source: ESRI; TNDG.

**Table B-3**
**Total Income and Potential Retail Sales Projections**
**San Ramon Retail Trade Area**
**In thousands of constant dollars**

| Area | 2019 | 2020 | 2021 | 2025 | 2026 | 2030 | 2035 | 2040 |
|---|---|---|---|---|---|---|---|---|
| ***Percent of Income Spent on Retail:*** | | | | | | | | |
| Primary Market Area | 23.2% | 23.2% | 23.2% | 23.2% | 23.2% | 23.2% | 23.2% | 23.2% |
| Secondary Market Area | 22.2% | 22.2% | 22.2% | 22.2% | 22.2% | 22.2% | 22.2% | 22.2% |
| ***Total Income:*** | | | | | | | | |
| Primary Market Area | $6,751,429 | $6,949,877 | $7,149,087 | $8,027,420 | $8,263,373 | $9,063,601 | $10,306,759 | $11,728,508 |
| Secondary Market Area | $3,695,941 | $3,789,379 | $3,882,410 | $4,290,157 | $4,398,617 | $4,860,579 | $5,506,844 | $6,239,036 |
| Total | $10,447,371 | $10,739,255 | $11,031,497 | $12,317,578 | $12,661,991 | $13,924,180 | $15,813,602 | $17,967,544 |
| ***Potential Retail Sales:*** | | | | | | | | |
| Primary Market Area | $1,566,332 | $1,612,371 | $1,658,588 | $1,862,362 | $1,917,103 | $2,102,755 | $2,391,168 | $2,721,014 |
| Secondary Market Area | $820,499 | $841,242 | $861,895 | $952,415 | $976,493 | $1,079,048 | $1,222,519 | $1,385,066 |
| Total | $2,386,831 | $2,453,613 | $2,520,483 | $2,814,776 | $2,893,596 | $3,181,804 | $3,613,687 | $4,106,080 |

Source: TNDG.

**Table B-4**
**Distribution of Retail Sales by Retail Category**
**San Ramon Retail Trade Area**

| Retail Category | 2019 | %Distribution 2020 | %Distribution 2021 | %Distribution 2025 | %Distribution 2026 | %Distribution 2030 | %Distribution 2035 | %Distribution 2040 |
|---|---|---|---|---|---|---|---|---|
| *Shopper Goods:* | | | | | | | | |
| Clothing and Clothing Accessories | 7.0% | 7.0% | 7.0% | 7.0% | 7.0% | 7.0% | 7.0% | 7.0% |
| General Merchandise | 13.0% | 13.0% | 13.0% | 13.0% | 13.0% | 13.0% | 13.0% | 13.0% |
| Home Furnishings and Appliances | 5.0% | 5.0% | 5.0% | 5.0% | 5.0% | 5.0% | 5.0% | 5.0% |
| Specialty/Other | 13.0% | 13.0% | 13.0% | 13.0% | 13.0% | 13.0% | 13.0% | 13.0% |
| Subtotal | 38.0% | 38.0% | 38.0% | 38.0% | 38.0% | 38.0% | 38.0% | 38.0% |
| *Convenience Goods:* | | | | | | | | |
| Food and Beverage | 15.0% | 15.0% | 15.0% | 15.0% | 15.0% | 15.0% | 15.0% | 15.0% |
| Food Service and Drinking | 15.0% | 15.0% | 15.0% | 15.0% | 15.0% | 15.0% | 15.0% | 15.0% |
| Subtotal | 30.0% | 30.0% | 30.0% | 30.0% | 30.0% | 30.0% | 30.0% | 30.0% |
| *Heavy Commercial Goods:* | | | | | | | | |
| Bldg. Matrl. and Garden Equip. and Supplies | 7.0% | 7.0% | 7.0% | 7.0% | 7.0% | 7.0% | 7.0% | 7.0% |
| Motor Vehicle and Parts Dealers | 15.0% | 15.0% | 15.0% | 15.0% | 15.0% | 15.0% | 15.0% | 15.0% |
| Gasoline Stations | 10.0% | 10.0% | 10.0% | 10.0% | 10.0% | 10.0% | 10.0% | 10.0% |
| Subtotal | 32.0% | 32.0% | 32.0% | 32.0% | 32.0% | 32.0% | 32.0% | 32.0% |
| Total | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% |

Source: TNDG, based on historic trends (2019 taxable sales) reported by the California Department of Tax and Fee Administration for Contra Costa County and California.

**Table B-5**
**Projected Demand for Retail Sales by Major Retail Category**
**San Ramon Retail Trade Area - Primary Market Area**
**In thousands of constant dollars**

| **Retail Category** | **2019** | **2020** | **2021** | **2025** | **2026** | **2030** | **2035** | **2040** |
|---|---|---|---|---|---|---|---|---|
| *Shopper Goods:* | | | | | | | | |
| Clothing and Clothing Accessories | $109,643 | $112,866 | $116,101 | $130,365 | $134,197 | $147,193 | $167,382 | $190,471 |
| General Merchandise | 203,623 | 209,608 | 215,616 | 242,107 | 249,223 | 273,358 | 310,852 | 353,732 |
| Home Furnishings and Appliances | 78,317 | 80,619 | 82,929 | 93,118 | 95,855 | 105,138 | 119,558 | 136,051 |
| Specialty/Other | 203,623 | 209,608 | 215,616 | 242,107 | 249,223 | 273,358 | 310,852 | 353,732 |
| Subtotal | $595,206 | $612,701 | $630,263 | $707,697 | $728,499 | $799,047 | $908,644 | $1,033,985 |
| *Convenience Goods:* | | | | | | | | |
| Food and Beverage | $234,950 | $241,856 | $248,788 | $279,354 | $287,565 | $315,413 | $358,675 | $408,152 |
| Food Service and Drinking | 234,950 | 241,856 | 248,788 | 279,354 | 287,565 | 315,413 | 358,675 | 408,152 |
| Subtotal | $469,899 | $483,711 | $497,576 | $558,708 | $575,131 | $630,827 | $717,350 | $816,304 |
| *Heavy Commercial Goods:* | | | | | | | | |
| Bldg. Matrl. and Garden Equip. and Supplies | $109,643 | $112,866 | $116,101 | $130,365 | $134,197 | $147,193 | $167,382 | $190,471 |
| Motor Vehicle and Parts Dealers | 234,950 | 241,856 | 248,788 | 279,354 | 287,565 | 315,413 | 358,675 | 408,152 |
| Gasoline Stations | 156,633 | 161,237 | 165,859 | 186,236 | 191,710 | 210,276 | 239,117 | 272,101 |
| Subtotal | $501,226 | $515,959 | $530,748 | $595,956 | $613,473 | $672,882 | $765,174 | $870,724 |
| Total | $1,566,332 | $1,612,371 | $1,658,588 | $1,862,362 | $1,917,103 | $2,102,755 | $2,391,168 | $2,721,014 |

Source: TNDG.

**Table B-6**
**Projected Demand for Retail Sales by Major Retail Category**
**San Ramon Retail Trade Area - Secondary Market Area**
**In thousands of constant dollars**

| **Retail Category** | **2019** | **2020** | **2021** | **2025** | **2026** | **2030** | **2035** | **2040** |
|---|---|---|---|---|---|---|---|---|
| *Shopper Goods:* | | | | | | | | |
| Clothing and Clothing Accessories | $57,435 | $58,887 | $60,333 | $66,669 | $68,355 | $75,533 | $85,576 | $96,955 |
| General Merchandise | 106,665 | 109,361 | 112,046 | 123,814 | 126,944 | 140,276 | 158,928 | 180,059 |
| Home Furnishings and Appliances | 41,025 | 42,062 | 43,095 | 47,621 | 48,825 | 53,952 | 61,126 | 69,253 |
| Specialty/Other | 106,665 | 109,361 | 112,046 | 123,814 | 126,944 | 140,276 | 158,928 | 180,059 |
| Subtotal | $311,790 | $319,672 | $327,520 | $361,918 | $371,067 | $410,038 | $464,557 | $526,325 |
| *Convenience Goods:* | | | | | | | | |
| Food and Beverage | $123,075 | $126,186 | $129,284 | $142,862 | $146,474 | $161,857 | $183,378 | $207,760 |
| Food Service and Drinking | 123,075 | 126,186 | 129,284 | 142,862 | 146,474 | 161,857 | 183,378 | 207,760 |
| Subtotal | $246,150 | $252,373 | $258,569 | $285,724 | $292,948 | $323,715 | $366,756 | $415,520 |
| *Heavy Commercial Goods:* | | | | | | | | |
| Bldg. Matrl. and Garden Equip. and Supplies | $57,435 | $58,887 | $60,333 | $66,669 | $68,355 | $75,533 | $85,576 | $96,955 |
| Motor Vehicle and Parts Dealers | 123,075 | 126,186 | 129,284 | 142,862 | 146,474 | 161,857 | 183,378 | 207,760 |
| Gasoline Stations | 82,050 | 84,124 | 86,190 | 95,241 | 97,649 | 107,905 | 122,252 | 138,507 |
| Subtotal | $262,560 | $269,197 | $275,806 | $304,773 | $312,478 | $345,296 | $391,206 | $443,221 |
| Total | $820,499 | $841,242 | $861,895 | $952,415 | $976,493 | $1,079,048 | $1,222,519 | $1,385,066 |

Source: TNDG.

**Table B-7**
**Potential Capture of Market Area Demand for Retail Sales Expressed in Percentages**
**San Ramon Retail Trade Area - Primary Market Area**

| Retail Category | 2019 | 2020 | 2021 | 2025 | 2026 | 2030 | 2035 | 2040 |
|---|---|---|---|---|---|---|---|---|
| *Shopper Goods:* | | | | | | | | |
| Clothing and Clothing Accessories | 20.0% | 20.0% | 20.0% | 20.0% | 20.0% | 35.0% | 35.0% | 35.0% |
| General Merchandise | 35.0% | 35.0% | 35.0% | 35.0% | 35.0% | 45.0% | 45.0% | 45.0% |
| Home Furnishings and Appliances | 43.0% | 43.0% | 43.0% | 43.0% | 43.0% | 50.0% | 50.0% | 50.0% |
| Specialty/Other | 43.0% | 43.0% | 43.0% | 43.0% | 43.0% | 50.0% | 50.0% | 50.0% |
| *Convenience Goods:* | | | | | | | | |
| Food and Beverage | 89.0% | 89.0% | 89.0% | 89.0% | 89.0% | 95.0% | 95.0% | 95.0% |
| Food Service and Drinking | 56.0% | 56.0% | 56.0% | 56.0% | 56.0% | 85.0% | 85.0% | 85.0% |
| *Heavy Commercial Goods:* | | | | | | | | |
| Bldg. Matrl. and Garden Equip. and Supplies | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% |
| Motor Vehicle and Parts Dealers | 17.0% | 17.0% | 17.0% | 17.0% | 17.0% | 17.0% | 17.0% | 17.0% |
| Gasoline Stations | 59.0% | 59.0% | 59.0% | 59.0% | 59.0% | 70.0% | 70.0% | 70.0% |

Source: TNDG.

**Table B-8**
**Potential Capture of Market Area Demand for Retail Sales Expressed in Percentages**
**San Ramon Retail Trade Area - Secondary Market Area**

| Retail Category | 2019 | 2020 | 2021 | 2025 | 2026 | 2030 | 2035 | 2040 |
|---|---|---|---|---|---|---|---|---|
| *Shopper Goods:* | | | | | | | | |
| Clothing and Clothing Accessories | 0.0% | 0.0% | 0.0% | 2.0% | 2.0% | 2.0% | 2.0% | 2.0% |
| General Merchandise | 0.0% | 0.0% | 0.0% | 2.0% | 2.0% | 2.0% | 2.0% | 2.0% |
| Home Furnishings and Appliances | 0.0% | 0.0% | 0.0% | 2.0% | 2.0% | 2.0% | 2.0% | 2.0% |
| Specialty/Other | 0.0% | 0.0% | 0.0% | 2.0% | 2.0% | 2.0% | 2.0% | 2.0% |
| *Convenience Goods:* | | | | | | | | |
| Food and Beverage | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| Food Service and Drinking | 0.0% | 0.0% | 0.0% | 2.0% | 2.0% | 2.0% | 2.0% | 2.0% |
| *Heavy Commercial Goods:* | | | | | | | | |
| Bldg. Matrl. and Garden Equip. and Supplies | 15.0% | 15.0% | 15.0% | 15.0% | 15.0% | 15.0% | 15.0% | 15.0% |
| Motor Vehicle and Parts Dealers | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| Gasoline Stations | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |

Source: TNDG.

**Table B-9**
**Potential Capture of Market Area Demand for Retail Sales**
**San Ramon Retail Trade Area - Primary Market Area**
**In thousands of constant dollars**

| Retail Category | 2019 | 2020 | 2021 | 2025 | 2026 | 2030 | 2035 | 2040 |
|---|---|---|---|---|---|---|---|---|
| *Shopper Goods:* | | | | | | | | |
| Clothing and Clothing Accessories | $21,929 | $22,573 | $23,220 | $26,073 | $26,839 | $51,518 | $58,584 | $66,665 |
| General Merchandise | 71,268 | 73,363 | 75,466 | 84,737 | 87,228 | 123,011 | 139,883 | 159,179 |
| Home Furnishings and Appliances | 33,676 | 34,666 | 35,660 | 40,041 | 41,218 | 52,569 | 59,779 | 68,025 |
| Specialty/Other | 87,558 | 90,132 | 92,715 | 104,106 | 107,166 | 136,679 | 155,426 | 176,866 |
| Subtotal | $214,431 | $220,734 | $227,061 | $254,957 | $262,451 | $363,777 | $413,672 | $470,735 |
| *Convenience Goods:* | | | | | | | | |
| Food and Beverage | $209,105 | $215,252 | $221,422 | $248,625 | $255,933 | $299,643 | $340,741 | $387,744 |
| Food Service and Drinking | 131,572 | 135,439 | 139,321 | 156,438 | 161,037 | 268,101 | 304,874 | 346,929 |
| Subtotal | $340,677 | $350,691 | $360,743 | $405,064 | $416,970 | $567,744 | $645,615 | $734,674 |
| *Heavy Commercial Goods:* | | | | | | | | |
| Bldg. Matrl. and Garden Equip. and Supplies | $109,643 | $112,866 | $116,101 | $130,365 | $134,197 | $147,193 | $167,382 | $190,471 |
| Motor Vehicle and Parts Dealers | 39,941 | 41,115 | 42,294 | 47,490 | 48,886 | 53,620 | 60,975 | 69,386 |
| Gasoline Stations | 92,414 | 95,130 | 97,857 | 109,879 | 113,109 | 147,193 | 167,382 | 190,471 |
| Subtotal | $241,998 | $249,111 | $256,252 | $287,735 | $296,192 | $348,006 | $395,738 | $450,328 |
| Total | $797,106 | $820,536 | $844,055 | $947,756 | $975,614 | $1,279,527 | $1,455,026 | $1,655,737 |

Source: TNDG.

**Table B-10**
**Potential Capture of Market Area Demand for Retail Sales**
**San Ramon Retail Trade Area - Secondary Market Area**
**In thousands of constant dollars**

| **Retail Category** | **2019** | **2020** | **2021** | **2025** | **2026** | **2030** | **2035** | **2040** |
|---|---|---|---|---|---|---|---|---|
| *Shopper Goods:* | | | | | | | | |
| Clothing and Clothing Accessories | $0 | $0 | $0 | $1,333 | $1,367 | $1,511 | $1,712 | $1,939 |
| General Merchandise | 0 | 0 | 0 | 2,476 | 2,539 | 2,806 | 3,179 | 3,601 |
| Home Furnishings and Appliances | 0 | 0 | 0 | 952 | 976 | 1,079 | 1,223 | 1,385 |
| Specialty/Other | 0 | 0 | 0 | 2,476 | 2,539 | 2,806 | 3,179 | 3,601 |
| Subtotal | $0 | $0 | $0 | $7,238 | $7,421 | $8,201 | $9,291 | $10,527 |
| *Convenience Goods:* | | | | | | | | |
| Food and Beverage | $0 | $0 | $0 | $0 | $0 | $0 | $0 | $0 |
| Food Service and Drinking | 0 | 0 | 0 | 2,857 | 2,929 | 3,237 | 3,668 | 4,155 |
| Subtotal | $0 | $0 | $0 | $2,857 | $2,929 | $3,237 | $3,668 | $4,155 |
| *Heavy Commercial Goods:* | | | | | | | | |
| Bldg. Matrl. and Garden Equip. and Supplies | $8,615 | $8,833 | $9,050 | $10,000 | $10,253 | $11,330 | $12,836 | $14,543 |
| Motor Vehicle and Parts Dealers | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| Gasoline Stations | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| Subtotal | $8,615 | $8,833 | $9,050 | $10,000 | $10,253 | $11,330 | $12,836 | $14,543 |
| Total | $8,615 | $8,833 | $9,050 | $20,096 | $20,604 | $22,768 | $25,795 | $29,225 |

Source: TNDG.

**Table B-11**
**Potential Capture of Market Area Demand for Retail Sales**
**San Ramon Retail Trade Area - All Market Areas Combined**
**In thousands of constant dollars**

| **Retail Category** | **2019** | **2020** | **2021** | **2025** | **2026** | **2030** | **2035** | **2040** |
|---|---|---|---|---|---|---|---|---|
| *Shopper Goods:* | | | | | | | | |
| Clothing and Clothing Accessories | $21,929 | $22,573 | $23,220 | $27,406 | $28,207 | $53,028 | $60,295 | $68,604 |
| General Merchandise | 71,268 | 73,363 | 75,466 | 87,214 | 89,767 | 125,817 | 143,062 | 162,780 |
| Home Furnishings and Appliances | 33,676 | 34,666 | 35,660 | 40,993 | 42,194 | 53,648 | 61,002 | 69,410 |
| Specialty/Other | 87,558 | 90,132 | 92,715 | 106,582 | 109,705 | 139,485 | 158,604 | 180,467 |
| Subtotal | $214,431 | $220,734 | $227,061 | $262,196 | $269,873 | $371,977 | $422,963 | $481,262 |
| *Convenience Goods:* | | | | | | | | |
| Food and Beverage | $209,105 | $215,252 | $221,422 | $248,625 | $255,933 | $299,643 | $340,741 | $387,744 |
| Food Service and Drinking | 131,572 | 135,439 | 139,321 | 159,296 | 163,966 | 271,338 | 308,541 | 351,084 |
| Subtotal | $340,677 | $350,691 | $360,743 | $407,921 | $419,899 | $570,981 | $649,283 | $738,829 |
| *Heavy Commercial Goods:* | | | | | | | | |
| Bldg. Matrl. and Garden Equip. and Supplies | $118,258 | $121,699 | $125,151 | $140,366 | $144,450 | $158,523 | $180,218 | $205,014 |
| Motor Vehicle and Parts Dealers | 39,941 | 41,115 | 42,294 | 47,490 | 48,886 | 53,620 | 60,975 | 69,386 |
| Gasoline Stations | 92,414 | 95,130 | 97,857 | 109,879 | 113,109 | 147,193 | 167,382 | 190,471 |
| Subtotal | $250,613 | $257,944 | $265,302 | $297,735 | $306,446 | $359,336 | $408,575 | $464,871 |
| Total | $805,721 | $829,369 | $853,105 | $967,852 | $996,218 | $1,302,295 | $1,480,821 | $1,684,962 |

Source: TNDG.

**Table B-12**
**"Extra" Daytime Population with Employment Pattern**
**San Ramon Retail Trade Area**

| Retail Category | Factor |
|---|---|
| *Shopper Goods:* | |
| Clothing and Clothing Accessories | 1.07 |
| General Merchandise | 1.11 |
| Home Furnishings and Appliances | 1.05 |
| Specialty/Other | 1.06 |
| | |
| *Convenience Goods:* | |
| Food and Beverage | 1.02 |
| Food Services and Drinking | 1.05 |
| | |
| *Heavy Commercial Goods:* | |
| Bldg. Matrl. and Garden Equip. and Supplies | 1.00 |
| Motor Vehicle and Parts Dealers | 1.00 |
| Gasoline Stations | 1.10 |

Source: TNDG.

**Table B-13**
**Potential Capture of Market Area Demand for Retail Sales**
**San Ramon Retail Trade Area - Resident and Tourist/Visitor Demand Combined**
**In thousands of constant dollars**

| **Retail Category** | **2019** | **2020** | **2021** | **2025** | **2026** | **2030** | **2035** | **2040** |
|---|---|---|---|---|---|---|---|---|
| *Shopper Goods:* | | | | | | | | |
| Clothing and Clothing Accessories | $21,929 | $22,573 | $23,220 | $29,336 | $30,192 | $56,761 | $64,540 | $73,433 |
| General Merchandise | 71,268 | 73,363 | 75,466 | 97,141 | 99,985 | 140,138 | 159,346 | 181,309 |
| Home Furnishings and Appliances | 33,676 | 34,666 | 35,660 | 42,946 | 44,204 | 56,204 | 63,908 | 72,717 |
| Specialty/Other | 87,558 | 90,132 | 92,715 | 112,529 | 115,826 | 147,267 | 167,453 | 190,536 |
| Subtotal | $214,431 | $220,734 | $227,061 | $281,952 | $290,207 | $400,370 | $455,247 | $517,995 |
| *Convenience Goods:* | | | | | | | | |
| Food and Beverage | $209,105 | $215,252 | $221,422 | $254,101 | $261,570 | $306,242 | $348,246 | $396,284 |
| Food Service and Drinking | 131,572 | 135,439 | 139,321 | 166,836 | 171,728 | 284,183 | 323,147 | 367,704 |
| Subtotal | $340,677 | $350,691 | $360,743 | $420,937 | $433,298 | $590,425 | $671,393 | $763,988 |
| *Heavy Commercial Goods:* | | | | | | | | |
| Bldg. Matrl. and Garden Equip. and Supplies | $118,258 | $121,699 | $125,151 | $140,366 | $144,450 | $158,523 | $180,218 | $205,014 |
| Motor Vehicle and Parts Dealers | 39,941 | 41,115 | 42,294 | 47,490 | 48,886 | 53,620 | 60,975 | 69,386 |
| Gasoline Stations | 92,414 | 95,130 | 97,857 | 120,323 | 123,860 | 161,183 | 183,291 | 208,575 |
| Subtotal | $250,613 | $257,944 | $265,302 | $308,179 | $317,196 | $373,327 | $424,484 | $482,975 |
| Total | $805,721 | $829,369 | $853,105 | $1,011,068 | $1,040,701 | $1,364,121 | $1,551,124 | $1,764,958 |

Source: TNDG.

**Table B-14**
**Comparison of Potential Retail Demand with Estimated Sales**
**City of San Ramon**
**in thousands of constant dollars**
**(Using 2019 figures to avoid Covid distortions)**

| **Retail Category** | **2019 Demand** | **2019 Estimated Sales** | **Expected Less Actual** | **Percent Actual/ Expected** |
|---|---|---|---|---|
| *Shopper Goods:* | | | | |
| Clothing and Clothing Accessories | $21,929 | $21,707 | $221 | 99.0% |
| General Merchandise | $71,268 | 71,378 | (110) | 100.2% |
| Home Furnishings and Appliances | $33,676 | 33,879 | (203) | 100.6% |
| Specialty/Other | $87,558 | 88,321 | (763) | 100.9% |
| Subtotal | $214,431 | $215,286 | ($855) | 100.4% |
| *Convenience Goods:* | | | | |
| Food and Beverage | $209,105 | $208,933 | $172 | 99.9% |
| Food Service and Drinking | $131,572 | 132,721 | (1,149) | 100.9% |
| Subtotal | $340,677 | $341,654 | ($977) | 100.3% |
| *Heavy Commercial Goods:* | | | | |
| Bldg. Matrl. and Garden Equip. and Supplies | $118,258 | $118,315 | ($57) | 100.0% |
| Motor Vehicle and Parts Dealers | $39,941 | 39,259 | 683 | 98.3% |
| Gasoline Stations | $92,414 | 92,081 | 333 | 99.6% |
| Subtotal | $250,613 | $249,655 | $959 | 99.6% |
| Total | $805,721 | $806,594 | ($873) | 100.1% |

Source: CDTFA; TNDG.

**Table B-15**
**Net New Supportable Retail Sales (based on 2019 existing sales)**
**City of San Ramon**
**in thousands of constant dollars**

| **Retail Category** | **2019** | **2020** | **2021** | **2025** | **2026** | **2030** | **2035** | **2040** |
|---|---|---|---|---|---|---|---|---|
| *Shopper Goods:* | | | | | | | | |
| Clothing and Clothing Accessories | $221 | $866 | $1,513 | $7,628 | $8,485 | $35,054 | $42,832 | $51,726 |
| General Merchandise | (110) | 1,985 | 4,087 | 25,763 | 28,607 | 68,760 | 87,968 | 109,931 |
| Home Furnishings and Appliances | (203) | 787 | 1,781 | 9,067 | 10,325 | 22,325 | 30,029 | 38,838 |
| Specialty/Other | (763) | 1,810 | 4,394 | 24,208 | 27,505 | 58,946 | 79,132 | 102,215 |
| Subtotal | ($855) | $5,448 | $11,775 | $66,666 | $74,921 | $185,084 | $239,961 | $302,710 |
| *Convenience Goods:* | | | | | | | | |
| Food and Beverage | $172 | $6,318 | $12,488 | $45,168 | $52,637 | $97,309 | $139,313 | $187,351 |
| Food Service and Drinking | (1,149) | 2,718 | 6,600 | 34,115 | 39,007 | 151,462 | 190,426 | 234,983 |
| Subtotal | ($977) | $9,037 | $19,089 | $79,283 | $91,643 | $248,770 | $329,738 | $422,333 |
| *Heavy Commercial Goods:* | | | | | | | | |
| Bldg. Matrl. and Garden Equip. and Supplies | ($57) | $3,384 | $6,836 | $22,050 | $26,135 | $40,208 | $61,903 | $86,699 |
| Motor Vehicle and Parts Dealers | 683 | 1,857 | 3,035 | 8,231 | 9,627 | 14,362 | 21,716 | 30,127 |
| Gasoline Stations | 333 | 3,049 | 5,776 | 28,243 | 31,779 | 69,103 | 91,211 | 116,494 |
| Subtotal | $959 | $8,290 | $15,647 | $58,525 | $67,542 | $123,672 | $174,830 | $233,321 |
| Total | ($873) | $22,774 | $46,511 | $204,473 | $234,106 | $557,526 | $744,529 | $958,364 |

Source: TNDG.

**Table B-16**
**Sales Per Square Foot Standards**
**San Ramon Retail Trade Area**
**Expressed in Sales/Square Feet**

| Retail Category | Sales/Square Feet |
|---|---|
| GAFO* | $350 |
| Food and Beverage | $600 |
| Food Service and Drinking | $600 |
| Bldg. Matrl. and Garden Equip. and Supplies | $325 |
| Automotive Parts | $200 |

*GAFO: General Merchandise, Apparel, Furniture/Appliances, Other/Specialty

Source: Retail Maxim; Urban Land Institute (ULI); TNDG.

**Table B-17**
**Net Demand for Retail Space**
**City of San Ramon**
**Expressed in Square Feet**

| **Retail Category** | **2019** | **2020** | **2021** | **2025** | **2026** | **2030** | **2035** | **2040** |
|---|---|---|---|---|---|---|---|---|
| *Shopper Goods:* | | | | | | | | |
| GAFO | (2,442) | 15,566 | 33,643 | 190,474 | 214,061 | 528,811 | 685,604 | 864,885 |
| *Convenience Goods:* | | | | | | | | |
| Food and Beverage | 287 | 10,531 | 20,814 | 75,279 | 87,728 | 162,181 | 232,188 | 312,251 |
| Food Service and Drinking | (1,915) | 4,530 | 11,001 | 56,859 | 65,011 | 252,436 | 317,376 | 391,638 |
| Subtotal | (1,629) | 15,061 | 31,814 | 132,138 | 152,739 | 414,617 | 549,564 | 703,889 |
| *Heavy Commercial Goods:* | | | | | | | | |
| Bldg. Matrl. and Garden Equip. and Supplies | (175) | 10,412 | 21,033 | 67,848 | 80,416 | 123,716 | 190,471 | 266,766 |
| Automotive Parts* | 307 | 836 | 1,366 | 3,704 | 4,332 | 6,463 | 9,772 | 13,557 |
| Gasoline Stations | N/A | N/A | N/A | N/A | N/A | N/A | N/A | N/A |
| Subtotal | 133 | 11,247 | 22,399 | 71,552 | 84,748 | 130,179 | 200,243 | 280,323 |
| ***Total Retail Space*** | ***(3,938)*** | ***41,874*** | ***87,857*** | ***394,164*** | ***451,548*** | ***1,073,607*** | ***1,435,411*** | ***1,849,097*** |

*Assumes that automotive parts stores account for 9% of sales in overall Automotive group category (based on statewide average).

Source: TNDG.

# APPENDIX C

## Industry Cluster Analysis

This appendix provides a summary of industry growth/retraction trends in San Ramon, comparing the local economy's recent and longer-term performance to regional and national benchmarks.

The study evaluates the local economy in terms of industry "clusters." Clusters are groups of inter-related industry sectors whose growth potentials within a region tend to be closely aligned. The tendency of individual industries to co-locate in clusters reflects linkages through supply-chain relationships, as well as commonalities in terms of workforce requirements and infrastructure needs. The concept of industry clusters is an effective framework for economic development programming since it reflects a holistic understanding of the regional economic conditions driving the growth or retraction of individual sectors.

## *Definitions and Focus of Cluster Study*

The clusters analyzed in this study are based on definitions (i.e., industry groupings) from the U.S. Cluster Mapping Project, an economic development initiative led by Harvard Business School's Institute for Strategy and Competitiveness.

In accordance with the North American Industry Classification System (NAICS), the U.S. economy includes a total of approximately 1,100 individual industry sectors. The U.S. Cluster Mapping Project assigns each of these sectors to unique clusters based on the types of linkages described above. Nationally, the Cluster Mapping Project recognizes a total of 67 clusters, with 16 classified as "local" clusters and 51 classified as "traded" clusters. The U.S. Cluster Mapping Project uses County Business Patterns (CBP, U.S. Census Bureau) data for its cluster-based employment estimates. However, the CBP does not track employment for some industries (e.g., government and crop production). Thus, the U.S. Cluster Mapping project does not include these industries in their industry-based cluster definitions. Given that EMSI – the data employment data provider used in this analysis – provides employment estimates and projections for all industries, we have followed the EMSI methodology and slightly modified the U.S. Cluster Mapping Project definitions and created three new government-related local clusters[9].

Total current (2021) employment in San Ramon is estimated at 37,301 jobs[10]. Of this total, 36,161 jobs are in industries that are included in either a "local" or "traded" cluster (as further defined below); the remaining 1,141 jobs are in miscellaneous industries not associated with specific clusters. The local clusters currently represent a total of 26,417 jobs in San Ramon, while the traded clusters account for 9,744 jobs.

Whereas local and traded clusters are both critically important components of a balanced economy, they have distinct roles and characteristics, and these distinctions can be helpful in terms of planning economic development programs. Some of these distinctions are summarized as follows:

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[9] See Appendix E for details on the cluster industry additions and new clusters. Based on the EMSI adjustments, the following are the only two industries not assigned to a local or traded cluster: NAICS 814110 – Private Households and NAICS 999999 – Unclassified Industry.

[10] All employment data used in this analysis are from EMSI – a private data/modeling firm nationally regarded for its ability to provide detailed (6-digit NAICS code) industry employment estimates for small areas of geography (cities and zip codes).

- ***Local clusters*** typically form the core of a region's economy; they primarily provide goods and services for the local (resident) population. They tend to account for the majority of jobs in a region (in the case of San Ramon, local clusters represent about 71% of total jobs), and support a high quality of life by ensuring the availability of a diverse range of goods and services.

- ***Traded clusters*** are "export-oriented" in the sense that they include industries that are engaged in producing goods and services for end customers outside the region. Traded clusters represent close to 29% of the jobs in San Ramon, and are especially important from an economic development perspective given that they tend to have higher wages and higher "multiplier impacts" compared to local clusters. That is, they have a strong potential to inject new dollars into the local economy and thereby serve as "drivers" for broader economic growth.

## *Existing Important Clusters in San Ramon, Contra Costa County and East Bay Area*

Table C-1, on page 41, lists all traded clusters that had 50 or more jobs in San Ramon in 2021, and provides the following information about each listed cluster:

- Total number of jobs in San Ramon in 2021 (the latest full year for which data are available)
- Location quotient (compared to U.S. benchmark) in 2021. The location quotient (LQ) measures how concentrated/important an industry cluster is in a region compared to national benchmarks. An LQ value greater than 1.0 indicates that a cluster is more concentrated in the region than it is nationally. This is generally regarded as an indication that the region has a comparative advantage relative to a particular cluster, although (especially for local clusters) an LQ below 1.0 can indicate a potential growth opportunity.
- Average annual wage for jobs in San Ramon[11]
- Change in the number of jobs for the most recent 10-year period, 2011-2021

Table C-2, page 42, provides the same data for local clusters that had more than 500 jobs in San Ramon in 2021. Tables C-3 and C-4, on pages 43 and 44, provide comparable data for Contra Costa County. The jobs threshold for San Ramon and Contra Costa County is 500 for traded clusters and 10,000 for local clusters. Finally, Tables C-5 and C-6, on pages 45 and 46, provide comparable data for the East Bay Area region (Contra Costa and Alameda Counties combined). For the East Bay Area, the jobs threshold is 2,000 for traded clusters and 20,000 for local clusters

Tables C-7 and C-8, on pages 47 and 48, summarize cluster job growth/retraction performance in San Ramon, Contra Costa County, and the East Bay Area compared to national trends. This part of the study is based on a "shift-share" analysis for each cluster that estimates an "expected" job change based on national trends. If San Ramon (or Contra Costa County or East Bay Area) has higher job growth (or experiences less severe job losses) compared to the expected change, it indicates that the local area (or Contra Costa County or East Bay Area) has performed better than national trends. Conversely, if San Ramon/Contra Costa County/East Bay Area has less job growth (or experiences more severe job losses)

[11] Wage data are for jobs (not residents) based in San Ramon.

compared to the expected change, it indicates that the specific region has performed worse than national trends.

**TABLE C-1. SUMMARY CHARACTERISTICS AND TRENDS, SAN RAMON'S LARGEST TRADED CLUSTERS (LIST INCLUDES ALL CLUSTERS WITH MORE THAN 50 JOBS IN 2021).**

| TRADED CLUSTER | JOBS | LQ | County LQ* | AVG ANN WAGE | 10-YR JOB CHANGE |
|---|---|---|---|---|---|
| Business Services | 3,833 | 1.6 | 1.1 | 147,458 | 659 |
| Distribution and Electronic Commerce | 1,040 | 0.7 | 0.5 | 130,073 | (141) |
| Insurance Services | 752 | 2.0 | 1.2 | 106,822 | 177 |
| Education and Knowledge Creation | 691 | 0.4 | 0.6 | 64,911 | 76 |
| Hospitality and Tourism | 628 | 1.1 | 0.6 | 42,557 | (169) |
| Financial Services | 622 | 1.3 | 1.2 | 176,341 | (71) |
| Information Technology and Analytical Instruments | 497 | 1.5 | 0.7 | 158,666 | 34 |
| Marketing, Design, and Publishing | 377 | 0.9 | 0.8 | 84,574 | 10 |
| Medical Devices | 347 | 4.9 | 1.2 | 127,720 | 65 |
| Agricultural Inputs and Services | 207 | 0.5 | 0.2 | 57,485 | (7) |
| Biopharmaceuticals | 112 | 1.5 | 0.7 | 202,959 | (77) |
| Performing Arts | 91 | 0.7 | 1.3 | 35,540 | (2) |
| Communications Equipment and Services | 81 | 1.2 | 1.6 | 100,490 | 40 |
| Downstream Chemical Products | 80 | 1.2 | 0.6 | 105,324 | (72) |
| Transportation and Logistics | 64 | 0.1 | 0.3 | 99,713 | (1) |
| Oil and Gas Production and Transportation | 57 | 0.4 | 3.3 | 139,597 | (65) |
| **GROUP TOTAL / AVG** | **9,480** | **1.04** | **0.81** | **$125,106** | **457** |
| **CITY TOTAL** | **37,301** | **N/A** | **N/A** | **$94,706** | **3,515** |

*Note*: LQ = Location Quotient; 10-year job change is from 2011 to 2021. *County LQ provided for comparison purposes.

*Source*: U.S. Cluster Mapping Project; EMSI; The Natelson Dale Group, Inc. (TNDG).

**TABLE C-2. SUMMARY CHARACTERISTICS AND TRENDS, SAN RAMON'S LARGEST LOCAL CLUSTERS (LIST INCLUDES ALL CLUSTERS WITH MORE THAN 500 JOBS IN 2021).**

| LOCAL CLUSTER | JOBS | LQ | County LQ* | AVG ANN WAGE | 10-YR JOB CHANGE |
|---|---|---|---|---|---|
| Local Real Estate, Construction, and Development | 4,921 | 1.7 | 1.3 | 94,805 | 1,208 |
| Local Health Services | 4,033 | 0.9 | 1.1 | 98,787 | 359 |
| Local Hospitality Establishments | 2,918 | 1.1 | 1.1 | 31,477 | (293) |
| Local Commercial Services | 2,677 | 1.2 | 1.2 | 86,084 | 217 |
| Local Financial Services | 1,763 | 2.2 | 1.3 | 129,976 | 375 |
| Local Utilities | 1,623 | 6.4 | 2.8 | 197,794 | 251 |
| Local Education and Training | 1,425 | 0.7 | 1.1 | 82,622 | 5 |
| Local Logistical Services | 1,421 | 2.1 | 1.1 | 61,854 | 647 |
| Local Food and Beverage Processing and Distribution | 986 | 1.0 | 1.2 | 52,597 | 33 |
| Local Personal Services (Non-Medical) | 952 | 1.1 | 1.2 | 42,807 | (1) |
| Local Community and Civic Organizations | 892 | 0.6 | 1.6 | 52,230 | 332 |
| Local Government | 751 | 0.6 | 1.0 | 142,939 | (27) |
| Local Motor Vehicle Products and Services | 507 | 0.5 | 0.9 | 63,448 | (10) |
| **GROUP TOTAL / AVG** | **24,869** | **1.16** | **1.18** | **$89,339** | **3,096** |
| **CITY TOTAL** | **37,301** | **N/A** | **N/A** | **$94,706** | **3,515** |

*Note*: LQ = Location Quotient; 10-year job change is from 2011 to 2021. *County LQ provided for comparison purposes.

*Source*: U.S. Cluster Mapping Project; EMSI; The Natelson Dale Group, Inc. (TNDG).

**TABLE C-3. SUMMARY CHARACTERISTICS AND TRENDS, CONTRA COSTA COUNTY'S LARGEST TRADED CLUSTERS (LIST INCLUDES ALL CLUSTERS WITH MORE THAN 500 JOBS IN 2021)**

| TRADED CLUSTER | JOBS | LQ | AVG ANN WAGE | 10-YR JOB CHANGE |
|---|---|---|---|---|
| Business Services | 29,552 | 1.1 | $141,730 | 4,761 |
| Education and Knowledge Creation | 9,605 | 0.6 | 79,023 | (262) |
| Distribution and Electronic Commerce | 8,304 | 0.5 | 107,377 | 943 |
| Financial Services | 6,396 | 1.2 | 189,895 | (1,133) |
| Insurance Services | 4,826 | 1.2 | 118,061 | 190 |
| Oil and Gas Production and Transportation | 4,604 | 3.3 | 248,538 | (3,262) |
| Hospitality and Tourism | 3,756 | 0.6 | 44,235 | (1,069) |
| Marketing, Design, and Publishing | 3,460 | 0.8 | 81,594 | (81) |
| Information Technology and Analytical Instruments | 2,516 | 0.7 | 156,970 | 777 |
| Construction Products and Services | 2,446 | 1.0 | 127,293 | 336 |
| Food Processing and Manufacturing | 1,891 | 0.6 | 87,254 | 287 |
| Performing Arts | 1,855 | 1.3 | 47,988 | 320 |
| Transportation and Logistics | 1,506 | 0.3 | 86,352 | 122 |
| Communications Equipment and Services | 1,186 | 1.6 | 120,038 | (252) |
| Medical Devices | 936 | 1.2 | 119,509 | 73 |
| Water Transportation | 933 | 1.2 | 177,241 | 445 |
| Agricultural Inputs and Services | 851 | 0.2 | 60,835 | (72) |
| Environmental Services | 729 | 2.1 | 99,111 | 274 |
| Upstream Metal Manufacturing | 683 | 0.7 | 111,733 | (174) |
| Furniture | 542 | 0.6 | 73,410 | 87 |
| Biopharmaceuticals | 541 | 0.7 | 205,716 | (37) |
| Printing Services | 527 | 0.5 | 58,248 | (95) |
| **GROUP TOTAL / AVG** | **87,646** | **1.14** | **$126,741** | **2,176** |
| **COUNTY TOTAL** | **408,666** | **N/A** | **$88,263** | **40,807** |

*Note:* LQ = Location Quotient; 10-year job change is from 2011 to 2021.
*Source*: U.S. Cluster Mapping Project; EMSI; The Natelson Dale Group, Inc. (TNDG).

TABLE C-4. SUMMARY CHARACTERISTICS AND TRENDS, CONTRA COSTA COUNTY'S LARGEST LOCAL CLUSTERS

| LOCAL CLUSTER | JOBS | LQ | AVG ANN WAGE | 10-YR JOB CHANGE |
|---|---|---|---|---|
| Local Health Services | 51,789 | 1.1 | $111,233 | 7,680 |
| Local Real Estate, Construction, and Development | 41,160 | 1.3 | 87,270 | 8,295 |
| Local Hospitality Establishments | 31,159 | 1.1 | 29,674 | 86 |
| Local Commercial Services | 29,107 | 1.2 | 76,266 | 6,579 |
| Local Education and Training | 24,574 | 1.1 | 84,115 | 876 |
| Local Community and Civic Organizations | 23,418 | 1.6 | 34,005 | 13,191 |
| Local Government | 13,654 | 1.0 | 142,939 | (491) |
| Local Food and Beverage Processing and Distribution | 13,470 | 1.2 | 50,988 | 778 |
| Local Personal Services (Non-Medical) | 12,173 | 1.2 | 41,792 | (696) |
| Local Financial Services | 11,607 | 1.3 | 130,823 | 1,831 |
| Local Retailing of Clothing and General Merchandise | 10,414 | 1.0 | 38,329 | (2,497) |
| Local Motor Vehicle Products and Services | 10,216 | 0.9 | 64,185 | (444) |
| **GROUP TOTAL / AVG** | **272,739** | **1.16** | **$77,293** | **35,189** |
| **REGION TOTAL** | **408,666** | **N/A** | **$88,263** | **40,807** |

*Note*: LQ = Location Quotient; 10-year job change is from 2011 to 2021.
*Source*: U.S. Cluster Mapping Project; EMSI; The Natelson Dale Group, Inc. (TNDG).

TABLE C-5. SUMMARY CHARACTERISTICS AND TRENDS, EAST BAY AREA'S LARGEST TRADED CLUSTERS (LIST INCLUDES ALL CLUSTERS W/ MORE THAN 2,000 JOBS IN 2021)

| TRADED CLUSTER | JOBS | LQ | AVG ANN WAGE | 10-YR JOB CHANGE |
|---|---|---|---|---|
| Business Services | 101,708 | 1.3 | $158,258 | 15,373 |
| Education and Knowledge Creation | 69,987 | 1.3 | 118,036 | 7,506 |
| Distribution and Electronic Commerce | 43,859 | 0.9 | 98,709 | 4,469 |
| Information Technology and Analytical Instruments | 30,328 | 2.7 | 178,377 | 9,396 |
| Automotive | 17,524 | 2.4 | 186,339 | 14,860 |
| Marketing, Design, and Publishing | 13,549 | 1.0 | 103,176 | 2,375 |
| Insurance Services | 12,776 | 1.0 | 156,541 | 5,322 |
| Hospitality and Tourism | 11,980 | 0.6 | 55,300 | (2,735) |
| Food Processing and Manufacturing | 10,585 | 1.1 | 86,158 | 2,013 |
| Financial Services | 10,287 | 0.6 | 183,990 | (2,450) |
| Transportation and Logistics | 9,217 | 0.6 | 98,031 | 2,007 |
| Medical Devices | 7,587 | 3.2 | 166,486 | 3,305 |
| Performing Arts | 6,604 | 1.5 | 45,966 | 1,076 |
| Oil and Gas Production and Transportation | 4,738 | 1.1 | 245,715 | (3,449) |
| Construction Products and Services | 4,719 | 0.6 | 121,718 | 1,027 |
| Water Transportation | 3,787 | 1.7 | 168,933 | (103) |
| Production Technology and Heavy Machinery | 3,474 | 0.5 | 106,426 | 541 |
| Biopharmaceuticals | 3,217 | 1.3 | 202,006 | (130) |
| Communications Equipment and Services | 3,134 | 1.4 | 140,506 | (2,413) |
| Video Production and Distribution | 2,974 | 1.3 | 146,732 | 262 |
| Metalworking Technology | 2,465 | 0.7 | 89,297 | 545 |
| Lighting and Electrical Equipment | 2,342 | 0.9 | 135,674 | 621 |
| Plastics | 2,067 | 0.4 | 78,928 | (123) |
| Printing Services | 2,061 | 0.7 | 71,146 | (789) |
| **GROUP TOTAL / AVG** | **376,842** | **1.14** | **$136,687** | **59,419** |
| **COUNTY TOTAL** | **1,250,198** | **N/A** | **$96,395** | **163,277** |

*Note*: LQ = Location Quotient; 10-year job change is from 2011 to 2021.
*Source*: U.S. Cluster Mapping Project; EMSI; The Natelson Dale Group, Inc. (TNDG).

**TABLE C-6. SUMMARY CHARACTERISTICS AND TRENDS, EAST BAY AREA'S LARGEST LOCAL CLUSTERS (LIST INCLUDES ALL CLUSTERS W/ MORE THAN 20,000 JOBS IN 2021)**

| LOCAL CLUSTER | JOBS | LQ | AVG ANN WAGE | 10-YR JOB CHANGE |
|---|---|---|---|---|
| Local Health Services | 134,641 | 0.9 | $111,636 | 15,471 |
| Local Real Estate, Construction, and Development | 114,400 | 1.1 | 92,184 | 27,603 |
| Local Hospitality Establishments | 78,435 | 0.9 | 30,912 | (3,282) |
| Local Community and Civic Organizations | 73,182 | 1.6 | 37,779 | 44,036 |
| Local Commercial Services | 72,092 | 1.0 | 74,711 | 10,994 |
| Local Education and Training | 61,396 | 0.9 | 89,150 | 4,621 |
| Local Government | 46,077 | 1.1 | 151,734 | 219 |
| Local Food and Beverage Processing and Distribution | 38,155 | 1.1 | 54,385 | 2,289 |
| Local Personal Services (Non-Medical) | 30,457 | 1.0 | 43,091 | 598 |
| Local Motor Vehicle Products and Services | 28,355 | 0.8 | 67,698 | 1,780 |
| Local Logistical Services | 28,100 | 1.2 | 66,476 | 9,411 |
| Local Retailing of Clothing and General Merchandise | 27,003 | 0.8 | 40,451 | (4,360) |
| Local Financial Services | 20,436 | 0.8 | 118,510 | 1,478 |
| **GROUP TOTAL / AVG** | **752,729** | **1.01** | **$78,788** | **110,857** |
| **COUNTY TOTAL** | **1,250,198** | **N/A** | **$96,395** | **163,277** |

*Note*: LQ = Location Quotient; 10-year job change is from 2011 to 2021.
*Source*: U.S. Cluster Mapping Project; EMSI; The Natelson Dale Group, Inc. (TNDG).

TABLE C-7. JOB GROWTH/RETRACTION PERFORMANCE COMPARED TO NATIONAL TRENDS FOR LARGEST TRADED CLUSTERS, SAN RAMON, CONTRA COSTA COUNTY, AND EAST BAY AREA

| TRADED CLUSTER | 2011-21 GROWTH PERFORMANCE BASED ON SHIFT SHARE ANALYSIS | | |
|---|---|---|---|
| | SAN RAMON | CONTRA COSTA COUNTY | EAST BAY AREA |
| Agricultural Inputs and Services | - | - | - |
| Automotive | - | + | + |
| Biopharmaceuticals | - | - | - |
| Business Services | - | - | - |
| Communications Equipment and Services | + | + | - |
| Construction Products and Services | + | - | + |
| Distribution and Electronic Commerce | - | - | - |
| Downstream Chemical Products | - | - | - |
| Education and Knowledge Creation | + | - | + |
| Environmental Services | + | + | + |
| Financial Services | - | - | - |
| Food Processing and Manufacturing | + | - | + |
| Furniture | + | + | - |
| Hospitality and Tourism | - | - | - |
| Information Technology and Analytical Instruments | - | + | + |
| Insurance Services | + | - | + |
| Lighting and Electrical Equipment | + | + | + |
| Marketing, Design, and Publishing | - | - | + |
| Medical Devices | + | + | + |
| Metalworking Technology | + | - | + |
| Oil and Gas Production and Transportation | - | - | - |
| Performing Arts | - | + | + |
| Plastics | - | - | - |
| Printing Services | + | + | - |
| Production Technology and Heavy Machinery | + | + | + |
| Transportation and Logistics | - | - | + |
| Upstream Metal Manufacturing | + | - | - |
| Video Production and Distribution | + | + | + |
| Water Transportation | + | + | - |

*Note*: " + " = growth performance better than expected; " - " worse than expected.
*Source*: U.S. Cluster Mapping Project; EMSI; The Natelson Dale Group, Inc. (TNDG).

Table C-8. Job Growth/Retraction Performance Compared to National Trends for Largest Local Clusters, SAN RAMON, Contra Costa County, and East Bay Area

| LOCAL CLUSTER | 2011-21 GROWTH PERFORMANCE BASED ON SHIFT SHARE ANALYSIS | | |
|---|---|---|---|
| | SAN RAMON | CONTRA COSTA COUNTY | EAST BAY AREA |
| Local Commercial Services | + | + | + |
| Local Community and Civic Organizations | - | + | + |
| Local Education and Training | + | + | + |
| Local Financial Services | - | + | - |
| Local Food and Beverage Processing and Distribution | - | - | - |
| Local Government | - | - | - |
| Local Health Services | + | + | + |
| Local Hospitality Establishments | - | - | - |
| Local Logistical Services | + | + | + |
| Local Motor Vehicle Products and Services | - | - | - |
| Local Personal Services (Non-Medical) | - | - | - |
| Local Real Estate, Construction, and Development | - | + | + |
| Local Retailing of Clothing and General Merchandise | - | - | - |
| Local Utilities | - | + | + |

*Note*: " + " = growth performance better than expected; " - " worse than expected.
*Source*: U.S. Cluster Mapping Project; EMSI; The Natelson Dale Group, Inc. (TNDG).

## *Potential Growth Industries/Clusters for San Ramon*

The following three tables (Tables C-9 to C-11) provide important existing clusters for the three geographic areas evaluated in this analysis: San Ramon, Contra Costa County, and the East Bay Area. For each area, clusters are highlighted/shaded on the table if they are in the top 10 for at least one of the three variables:

1. 2021 Location Quotient (LQ)
2. Number of jobs in 2021
3. Job growth between 2011 and 2021

For additional context, the tables also show the average annual wage associated with each cluster.

### Table C-9. Top 10 Clusters for Key Variables: LQ, Jobs, and Job Growth, San Ramon

| CLUSTER | LQ | JOBS | 10-YR JOB CHANGE | AVG. ANN WAGE |
|---|---|---|---|---|
| Local Utilities | 6.4 | 1,623 | 251 | 197,794 |
| Medical Devices | 4.9 | 347 | 65 | 127,720 |
| Local Financial Services | 2.2 | 1,763 | 375 | 129,976 |
| Local Logistical Services | 2.1 | 1,421 | 647 | 61,854 |
| Insurance Services | 2.0 | 752 | 177 | 106,822 |
| Local Real Estate, Construction, and Development | 1.7 | 4,921 | 1,208 | 94,805 |
| Business Services | 1.6 | 3,833 | 659 | 147,458 |
| Information Technology and Analytical Instruments | 1.5 | 497 | 34 | 158,666 |
| Biopharmaceuticals | 1.5 | 112 | (77) | 202,959 |
| Footwear | 1.4 | 5 | (0) | -- |
| Local Commercial Services | 1.2 | 2,677 | 217 | 86,084 |
| Local Hospitality Establishments | 1.1 | 2,918 | (293) | 31,477 |
| Local Health Services | 0.9 | 4,033 | 359 | 98,787 |
| Local Education and Training | 0.7 | 1,425 | 5 | 82,622 |
| Distribution and Electronic Commerce | 0.7 | 1,040 | (141) | 130,073 |
| Education and Knowledge Creation | 0.4 | 691 | 76 | 64,911 |
| **GROUP TOTAL / AVG** | **7.57** | **28,059** | **3,562** | **$103,881** |

*Note*: LQ = Location Quotient; 10-year job change is from 2011 to 2021.
*Source*: U.S. Cluster Mapping Project; EMSI; The Natelson Dale Group, Inc. (TNDG).

TABLE C-10. TOP 10 CLUSTERS FOR KEY VARIABLES: LQ, JOBS, AND JOB GROWTH, CONTRA COSTA COUNTY

| CLUSTER | LQ | JOBS | 10-YR JOB CHANGE | AVG. ANN WAGE |
|---|---|---|---|---|
| Oil and Gas Production and Transportation | 3.3 | 4,604 | (3,262) | 248,538 |
| Local Utilities | 2.8 | 7,845 | 472 | 186,644 |
| Environmental Services | 2.1 | 729 | 274 | 99,111 |
| Communications Equipment and Services | 1.6 | 1,186 | (252) | 120,038 |
| Local Community and Civic Organizations | 1.6 | 23,418 | 13,191 | 34,005 |
| Local Household Goods and Services | 1.4 | 8,449 | 854 | 48,941 |
| Local Financial Services | 1.3 | 11,607 | 1,831 | 130,823 |
| Performing Arts | 1.3 | 1,855 | 320 | 47,988 |
| Local Real Estate, Construction, and Development | 1.3 | 41,160 | 8,295 | 87,270 |
| Water Transportation | 1.2 | 933 | 445 | 177,241 |
| Local Personal Services (Non-Medical) | 1.2 | 12,173 | (696) | 41,792 |
| Local Commercial Services | 1.2 | 29,107 | 6,579 | 76,266 |
| Local Food and Beverage Processing and Distribution | 1.2 | 13,470 | 778 | 50,988 |
| Business Services | 1.1 | 29,552 | 4,761 | $141,730 |
| Local Education and Training | 1.1 | 24,574 | 876 | 84,115 |
| Local Health Services | 1.1 | 51,789 | 7,680 | 111,233 |
| Local Hospitality Establishments | 1.1 | 31,159 | 86 | 29,674 |
| Local Logistical Services | 1.1 | 8,178 | 3,196 | 66,228 |
| Local Government | 1.0 | 13,654 | (491) | 142,939 |
| Distribution and Electronic Commerce | 0.5 | 8,304 | 943 | 107,377 |

*Note*: LQ = Location Quotient; 10-year job change is from 2011 to 2021.
*Source*: U.S. Cluster Mapping Project; EMSI; The Natelson Dale Group, Inc. (TNDG).

TABLE C-11. TOP 10 CLUSTERS FOR KEY VARIABLES: LQ, JOBS, AND JOB GROWTH, EAST BAY AREA

| CLUSTER | LQ | JOBS | 10-YR JOB CHANGE | AVG. ANN WAGE |
|---|---|---|---|---|
| Medical Devices | 3.2 | 7,587 | 3,305 | 166,486 |
| Information Technology and Analytical Instruments | 2.7 | 30,328 | 9,396 | 178,377 |
| Automotive | 2.4 | 17,524 | 14,860 | $186,339 |
| Water Transportation | 1.7 | 3,787 | (103) | 168,933 |
| Local Community and Civic Organizations | 1.6 | 73,182 | 44,036 | 37,779 |
| Local Utilities | 1.5 | 13,085 | (962) | 165,647 |
| Performing Arts | 1.5 | 6,604 | 1,076 | 45,966 |
| Communications Equipment and Services | 1.4 | 3,134 | (2,413) | 140,506 |
| Education and Knowledge Creation | 1.3 | 69,987 | 7,506 | 118,036 |
| Video Production and Distribution | 1.3 | 2,974 | 262 | 146,732 |
| Business Services | 1.3 | 101,708 | 15,373 | 158,258 |
| Local Logistical Services | 1.2 | 28,100 | 9,411 | 66,476 |
| Local Real Estate, Construction, and Development | 1.1 | 114,400 | 27,603 | 92,184 |
| Local Government | 1.1 | 46,077 | 219 | 151,734 |
| Insurance Services | 1.0 | 12,776 | 5,322 | 156,541 |
| Local Commercial Services | 1.0 | 72,092 | 10,994 | 74,711 |
| Local Health Services | 0.9 | 134,641 | 15,471 | 111,636 |
| Local Education and Training | 0.9 | 61,396 | 4,621 | 89,150 |
| Local Hospitality Establishments | 0.9 | 78,435 | (3,282) | 30,912 |
| Distribution and Electronic Commerce | 0.9 | 43,859 | 4,469 | 98,709 |

*Note*: LQ = Location Quotient; 10-year job change is from 2011 to 2021.
*Source*: U.S. Cluster Mapping Project; EMSI; The Natelson Dale Group, Inc. (TNDG).

Table C-12, on the following page, provides a list of potential priority clusters for the City of San Ramon's economic development efforts (i.e., business retention, expansion and attraction). The identified clusters are based on two strategic approaches to industry targeting:

1. ***Build on San Ramon's existing core strengths.*** The core clusters (e.g., Medical Devices, Information Technology and Analytical Instruments) represent strong continuing growth opportunities that could be the focus of business expansion/attraction efforts.

2. ***Tap into dominant regional clusters that are not currently well represented in San Ramon.*** This strategic approach would seek to leverage San Ramon competitive strengths to capture increasing shares of projected County employment growth. This component of the City's economic development program would focus on the San Ramon's unique "selling points" relative to the larger regional economy (including the city's strategic location near several Contra Costa County area submarkets, along with a resident workforce that includes large numbers of commuters potentially eager to work closer to home). In developing the list of candidates for the "tap into dominant County clusters" strategy, the consultant has focused on clusters meeting the following criteria:

    a. Traded clusters (local clusters are addressed in the other strategic approach)
    b. Clusters with a high specialization of employment in Contra Costa County (identified as a "strong" cluster by the U.S. Cluster Mapping project)[12]
    c. Clusters primarily oriented towards private business investment (in contrast to clusters that are substantially composed of government/nonprofit employment – which are generally considered to have lower economic "spin-off" opportunities)

[12] The U.S. Cluster Mapping project defines a metro area's "strong" clusters as those with a high specialization in the region (metropolitan statistical area [MSA]). *High Specialization* indicates the LQ of Cluster Employment is greater than the 75th percentile when measured across all MSAs. There are 917 total MSAs in the U.S. Thus, for a cluster to be classified as "strong" in the Contra Costa County, its LQ must be greater than the LQ of that specific cluster in at least 687 of the MSAs in the U.S.

TABLE C-12. POTENTIAL GROWTH CLUSTERS FOR SAN RAMON

| STRATEGIC APPROACH | LOCAL-SERVING CLUSTERS | "TRADED" CLUSTERS |
|---|---|---|
| Build on San Ramon's existing core strengths | • Local Utilities<br>• Local Financial Services<br>• Local Logistical Services<br>• Local Real Estate, Construction, and Development | • Medical Devices<br>• Insurance Services<br>• Business Services<br>• Information Technology and Analytical Instruments<br>• Biopharmaceuticals |
| Tap into dominant Contra Costa County industry clusters that are not currently well represented in the local San Ramon area | | • Environmental Services<br>• Communications Equipment and Services<br>• Performing Arts |

*Source*: The Natelson Dale Group, Inc. (TNDG).