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East Bay

QUALITY OF LIFE



2014
SEPTEMBER

EAST BAY ECONOMIC DEVELOPMENT ALLIANCE (EAST BAY EDA)

The **East Bay Economic Development Alliance** (East Bay EDA) is a public/private partnership serving the San Francisco Bay Area's East Bay (Alameda and Contra Costa Counties) whose mission is to establish the East Bay as a world-recognized location to grow businesses, attract capital and create quality jobs.

The purpose of this report is to promote the quality of life assets of the East Bay. Coupled with the business reasons for business attraction, retention and growth, we present the unique characteristics of the East Bay that make it a preferred location to live, work, and play.

To see all of East Bay EDA's reports and economic forecasts, please visit:
www.eastbayeda.org

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ECONOMIC & PLANNING SYSTEMS, INC. (EPS)

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INTRODUCTION

The East Bay region of the San Francisco Bay Area, consisting of Alameda and Contra Costa Counties, is a collection of towns, cities and unincorporated areas that reflect different populations, industries, lifestyles and geographies. The East Bay benefits not only from its natural quality of life assets, but also from those that were created, enhanced and developed by those diverse populations.

The East Bay offers a level of quality of life that promises comfort, accessibility, diversity and a range of choices not available in other parts of the Bay Area. This is an attraction for companies contemplating relocation or growth in the East Bay, knowing that highly skilled workers seek out areas with a high



quality of life. It is also a driving factor for economic development, when local entrepreneurs, scientific researchers, think-tank contributors, cultural leaders and nonprofit executives choose the East Bay for their work sites as well as a place to live.

This study looks at six key quality of life metrics that define the uniqueness of the East Bay. These elements were selected from among others studied globally and domestically to assess the East Bay assets aligned with these elements. The study looks at the East Bay as a whole and its balance of urban, suburban and rural spaces enjoyed by today's residents. It also considers the economic importance of these assets to preserve, enhance and sustain an excellent quality of life. Ultimately, it concludes that it is critical that these highly valued East Bay quality of life assets become not just a reason for traveling to and living in the region, but also a reason to make the myriad spending and investment choices that are the basis of a robust and resilient economy.

Five observations about the approach and significance of this report can be summarized as follows:

1. **Economic regions are engaged in a complex competition for industries and talent that increasingly depend on quality of life factors.**

Natural amenities, resources, historical decisions and events have played key roles in explaining differences in economic performance between regions. Increasingly, however, as regions seek

globally competitive industries with rapidly changing technologies, quality of life has taken on significantly greater importance. With increasing freedom to choose, many high demand, skilled workers choose places to live and work based on quality of life. Where quality of life assets exist, their access and affordability extend the opportunity for businesses and regions to grow. For regions to grow in a 21st Century economy, a high quality of life has become a critical factor.

2. **The focus of this study is around six key areas of quality of life chosen after an extensive literature review.**

The six selected major quality of life topics for this study include: (1) housing availability and cost; (2) connectivity and mobility; (3) education; (4) natural amenities; (5) diversity, culture and urban amenities; and (6) public health and wellness. These topics, each with several subtopics, clarify the critical components of quality of life in the East Bay. Availability of jobs, wages, and economic opportunity, are also important, but have been addressed in separate East Bay Economic Development Alliance studies. Housing availability and cost are central to community and lifestyle choices. Connectivity and mobility are central features of new lifestyles and work environments, and the choice of options reflect a balance between investment decisions and value systems. Education is generally considered a critical component of quality of life in most of the world, but especially so in the East Bay where

National Laboratories, a world-class university and opportunities for innovation exist. Public health is also highly valued, and fortunately, the East Bay is home to a variety of large and small health care providers, and culturally sensitive community clinics. Kaiser Permanente, headquartered in the East Bay, is a national model for health maintenance organizations. Natural amenities, like the weather, shoreline access, and systems of parks and open space are powerful attractors that support healthy lifestyles and all that goes with them. Diversity, culture and urban amenities are inter-related strengths of the East Bay that reinforce associated activities, businesses and institutions.

and urban places marked by their diversity, cultural richness and array of urban amenities. The migration of populations to the East Bay, that continues to this day, has contributed greatly to the diversity of the region and has had a major influence on cultural preservation, food, retail choices, celebrations, tolerance and acceptance unlike almost any other part of the country. Social movements related to fresh food, disability rights, ethnic studies, clean energy, environmental stewardship, local procurement and retail investment, and preservation of open space have originated in the East Bay because of the different perspectives and values of its residents.

3. **Some East Bay quality of life assets are natural and others were created organically and by design.** The East Bay has numerous natural benefits attracting residents and businesses alike. The geography of the East Bay provides natural air conditioning that creates a mild climate with many warm days kept moderate in temperature by the bay and ocean. This natural setting contributes to the growth of a thriving vineyard industry, outdoor sports and recreation, public celebrations, outdoor entertainment and venues, local shopping developments, and other quality of life assets that can only be sustained by the kind of weather and topography the East Bay enjoys. The East Bay also has attributes that have evolved organically and through design, including small towns, rural communities, vibrant downtowns

4. **The East Bay's quality of life assets continue to play a critical role in attracting a talented workforce, a broad range of entrepreneurs and a large, diverse residential population.** The East Bay has long attracted a wide variety of residents, from native peoples and missionaries, to seasonal San Franciscans, to post-1906 earthquake refugees, to residents drawn by work and educational opportunities. The East Bay continues to grow and houses over a third of the Bay Area's residents in a diverse array of cities, towns and unincorporated communities. This residential appeal, deepened by the quality of life assets and affordability, has become a driving force in the expansion of the East Bay's economic base.

5. **The preservation and enhancement of these assets are what we owe future generations.** The competition for economic development, jobs, workforce and investments is dynamic and continuous. The future of individual communities of the East Bay, as well as the region as a whole, depends on concerted and ongoing efforts to preserve and enhance the East Bay's high quality of life. Whether the emphasis is on the excellence of educational institutions, the preservation and ongoing maintenance of regional parks and open space, or the continued celebrations of diversity and culture, the East Bay must continue to maintain and promote its exceptional assets for the benefit of future generations.



STUDY PURPOSE AND ORGANIZATION

PURPOSE OF REPORT

This study focuses on the quality of life in the East Bay – an area that consists of Alameda and Contra Costa Counties in California – home to roughly 2.6 million residents and 1.4 million jobs. The study summarizes the quality of life in the East Bay through six key metrics, identifying areas where the East Bay excels, where it performs adequately, and where there is room for improvement or increased attention. As a whole, the study is intended to serve as a guide for employers considering locating in the East Bay; for workers considering locating in the East Bay; and those leaders interested in sustaining and enhancing the region in which we live and work.

The East Bay Economic Development Alliance, a cross-sector member organization dedicated to the promotion of economic development in the East Bay, has recently released publications that have taken a focused look at the East Bay's economic assets (see *Building on our Assets: Economic Development & Job Creation in the East Bay*), its workforce (see *Special Report on the East Bay Workforce*), as well as an ongoing annual publication describing the East Bay's economic outlook (see *East Bay Economic Outlook 2014-15*). This study provides a complementary look at the East Bay, with a focus on the East Bay's quality of life, another critical component that is inextricably linked to the vitality, sustainability and resilience of the East Bay's economy and communities.

BACKGROUND

Sustained and balanced regional economic growth and development in advanced nations in the 21st Century depend on a region's willingness and ability to nurture, grow, and diversify their innate and historical comparative advantages. A vital and diversified economy and a high quality of life, including a supportive cultural and social infrastructure, can work together in a virtuous cycle to form, attract and retain firms of all sizes, in synchronicity with the attraction of new talent from outside the region and the creation and retention of home-grown talent within the region.

In today's economic environment, a strong local economy is not sufficient to ensure sustained economic prosperity or resilience in the face of demographic, economic and social change; economic and financial shocks; or natural disasters. A high count of jobs and income cannot be guaranteed to continue if education, health, infrastructure, entrepreneurialism, good governance and community resources fall by the wayside. Nor can a weak local economy hope to turn around its fortune without some investment in the assets and infrastructure needed to retain and nurture its homegrown talent and to attract new talent. Economic regions are engaged in a complex competition for top industries and top talent. That competition, while affected by history and natural differences, often occurs on the grounds of quality of life – a term that blends issues of freedom, opportunity, community and support.



Establishing and sustaining a strong quality of life is a complex task that falls to many leaders and sectors. A strong quality of life includes a number of basic elements important to all (such as clean air and clean water), elements shown to be critically linked to regional economic growth (such as an open and accepting culture, an embrace of domestic and international in-migration, efficient and effective public governance), as well as the component pieces of an appealing cultural whole (such as good schools, faith-based institutions, dog parks, and live music entertainment venues), each of differing levels of importance depending on age, culture, family composition and personal preference.

The philosophical underpinnings of this report builds from and is consistent with a large vein of prior literature from the fields of social science, philosophy and economic development: specifically that human well-being, quality of life, and economic prosperity are all closely linked. This study is consistent with the associated and well-established notion that in the U.S. today and in the foreseeable future, there is a critical link between quality of life and economic and community vitality, prosperity and well-being. In other words, investments in education, health, mobility and a strong environment, among other quality-of-life factors, should not be seen as competition to regional economic growth and prosperity, but rather as a critical part of ensuring sustained regional economic success and well-being. As a result, attention to and support for all the different factors that make for a high quality of life



are key components of any economic development strategy, whether at a national, state, regional or local level.

STUDY ORGANIZATION

The remainder of this study is organized into several sections. The subsequent chapter provides a brief overview of the past studies of quality of life and well-

being, the typical categories (“domains”) of quality of life, and the six specific quality of life categories selected for this study. The following six chapters are each focused on these inter-related, but distinct categories.

QUALITY OF LIFE DEFINED



There is a broad array of studies that have made the connection between different types of investments, institutions, assets and national, regional and local quality of life (e.g., parks and recreation, transportation infrastructure, job-training opportunities). There also are a number of studies that have sought to define quality of life and its drivers more broadly with reference to particular places, cities and regions. And, more recently, a number of studies focused on identifying the key parameters of national or regional well-being and happiness. An overview of these studies along with the categories of quality of life selected for this study are provided below.

HISTORY AND PRECEDENTS

Discussions of quality of life, well-being and happiness are often traced back to Aristotle, tied to John Locke and Jeremy Bentham and the utilitarian school of thought, and connected to the first “economists” - Adam Smith and Alfred Marshall – as well as to a range of non-western thinkers and philosophers. In recent decades, much debate also has focused around the relationship between per capita Gross Domestic Product and a nation’s well-being. Critiques of the use of GDP as a well-being measure have concentrated on the externalities not accounted for, including environmental pollution (air and water quality) and environmental amenities (open space, parks, and ecosystem services); the insensitivity of this measure to income and wealth inequality and associated issues (housing affordability, working hours/ commute times, and other life stressors); and the critical importance of access to education and health services (access to quality public school education and health care) and basic economic and political freedoms (primarily for studies outside of the U.S.).

Modern efforts to document quality of life and well-being in communities around the U.S. as well as in other nations are varied as shown in the following notable examples of “domains” (quality of life areas of focus) identified¹:

¹A recent meta-study by Karen Warner and Margaret Kern in support of the development of the City of Santa Monica’s evolution of a Wellbeing Index – an ongoing effort started in 2013 - provides an excellent overview of a number of such studies.

- **Jacksonville Quality of Life Progress Report**, 1985, Jacksonville, Florida – Nine areas of focus, including educational excellence, vibrant economy, transportation, community safety, environment, responsive government, social well-being, healthy community, and arts/culture/ recreation.
- **Bhutan Gross National Happiness Index**, 2008/2010, Bhutan – Nine areas of focus, including community vitality, cultural diversity and resilience, education, ecological diversity and resilience, health, good governance, living standards, psychological well-being, and time use.
- **Gross National Happiness USA**, 2008, State of Vermont Pilot - Nine areas of focus, including psychological well-being, physical health, time balance, community vitality, education, culture, environment, good governance, and standard of living.



- **UK National Office of National Statistics Well-Being Index**, 2011, United Kingdom - Ten areas of focus, including where we live, natural environment, economy, education and skills, governance, health, relationships, personal finance, personal well-being, and culture and society.
- **Canadian Index of Well-Being**, 2011, Canada - Eight areas of focus, including community vitality, culture, education, future security, health, relationships, safety, and standards of living.
- **Greater New Haven Community Index**, 2012, New Haven, Connecticut - Eight areas of focus, including demographics, housing, education, public safety, economy, health, civic vitality, and environment.
- **Santa Monica Local Well-Being Index**, 2013, Santa Monica, CA - Five areas of focus, including economic vitality, social connections, physical and mental health, education and care, and local context.

A number of other publications have confirmed the general focus of these studies. For example, the 1996 publication “*A Region at Risk: The Third Regional Plan for the New York-New Jersey-Connecticut Metropolitan Area*” prepared by the Regional Plan Association noted that their survey of residents of the Tri-Station Metropolitan Region identified safe streets, strong community or neighborhood, good public schools, and good financial institutions



as “most important to quality of life.” The same residents, when asked “what they liked most about their local communities” noted convenience and access to work, entertainment and schools, and being part of a good neighborhood or community.

A number of newspapers, periodicals, and other publications also have developed and published their own rankings of places based on singular or multiple metrics of quality of life/economic success using a combination of surveys, data and/or observations. These studies typically include a varied set of international and U.S. cities and regions, and use their own methodologies to determine their rankings. As a result, their findings can be dramatically different. For example, the magazine *Monocle*

recently released its 2014 ranking of the top 25 cities in the world for quality of life, based on a blended combination of weather, public safety, unemployment, social tolerance, architecture, public transport, parks, book shops, preponderance of chain stores and electric charging points. Only two cities from the Northern American continent made it on to their list. The *New York Times* also recently published an interactive graphic, *The Hardest Places to Live*, evaluating all U.S. counties based on six metrics: median income, college education, unemployment claims, disability claims, life expectancy and obesity. Not surprisingly, Alameda County and Contra Costa

QUALITY OF LIFE DEFINED



County, along with San Mateo County and Santa Clara County, all ranked in the best category-counties among the easiest places to live.

Other notable studies have focused on individual, rather than comprehensive, drivers of quality of life and economic well-being (e.g., transportation investments and quality of life, investments in place, economic development, and quality of life). Some of these studies have discussed the San Francisco Bay Area as part of their narrative – sometimes looking at the nine-county region, sometimes looking at a particular metro area within it, and sometimes looking at the City and County of San Francisco

alone - generally with positive conclusions. While these studies are less helpful in identifying the performance of the East Bay relative to the rest of the Bay Area or the State, they do demonstrate how the broader metropolitan area ranks in relation to the rest of the nation. Notable examples include: (1) Richard Florida's finding that the San Francisco Metropolitan Statistical Area ranks first or second in the nation for large metropolitan areas in his creativity index (depending on the precise index mix used); (2) Smart Growth America's findings that the San Francisco Metropolitan Area - comprised of the East Bay counties of Alameda and Contra Costa and the counties of San Francisco, Marin and San Mateo - ranks fourth in the nation in terms of walkable urbanism (the ability to walk to offices and retail) and that the City of Oakland's Complete Street Policy Initiative was one of the top ten in the nation; and (3) the Rockefeller Foundation's rating of Oakland, Berkeley and San Francisco as resilient cities, where resiliency refers to the programs in place and efforts under way to manage environmental disaster and post disaster recovery.

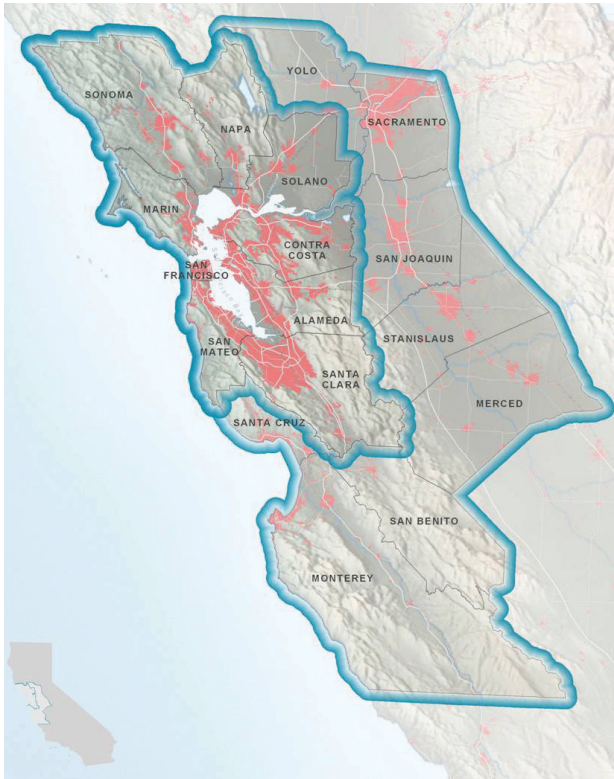
QUALITY OF LIFE CATEGORIES

Consistent with the prior more comprehensive studies of Quality of Life and Well-Being as well as the input from some East Bay cities, this study focuses on six key areas:

1. *Housing Availability and Cost*
2. *Connectivity and Mobility*
3. *Education*
4. *Natural Amenities*
5. *Diversity, Culture and Urban Amenities*
6. *Public Health and Wellness*

Unlike many studies, this study does not have a specific category for economic strength and does not focus on the size and range of different industry clusters and associated job and career opportunities, as these economic topics have been covered in other East Bay Economic Development Alliance publications. The link between the quality of life categories and economic opportunity and prosperity is, however, a fundamental theme of this study.





Map of 9-County Bay Area region with the 13-County Northern California MegaRegion

The East Bay is centrally located within the Northern California “MegaRegion.” The MegaRegion, as defined here, includes 13 counties and is home to roughly 9.7 million people and 5.9 million jobs. The Northern California MegaRegion is one of two MegaRegions in the State of California.

Like other major metropolitan mega-regions throughout the U.S., the Northern California MegaRegion contains a large economic base including “driving” industries and “region-serving” industries,

providing a broad array of job opportunities. It competes with other regions both in and outside of the U.S. for economic growth, jobs and talent. And like other regions, it faces the challenge of maintaining sustained overall economic growth and prosperity, while also grappling with issues of congestion, air quality, income disparity and wealth distribution, among others.

Located at the core of the Northern California MegaRegion, the East Bay comprises 2.6 million people (26 percent of the MegaRegion) and 1.4 million jobs (23 percent of the MegaRegion). However, within the nine-County Bay Area, the East Bay represents 36 percent of residents and 30 percent of jobs. Throughout this report, a range of comparisons are made to nearby areas, including comparisons with other counties in the Bay Area (in particular, San Francisco County, San Mateo County, and Santa Clara County) as well as comparisons with statewide averages and other subregions within the MegaRegion.

Of the five major sub-regions within the MegaRegion – the San Francisco Peninsula (San Francisco and San Mateo Counties), the South Bay (Santa Clara and Santa Cruz Counties), the North Bay (Marin, Napa, Sonoma, and Solano Counties), and nearby Central Valley Counties (Sacramento, San Joaquin, and Yolo Counties) - the East Bay is home to the greatest number of residents and supports the greatest number of jobs.

The East Bay today encompasses a diverse geography

of places to live, work and recreate. This diversity is a key factor contributing to the region’s quality of life. It is a region of many places with a vital ethnic mix and related cultural traditions in communities bordering San Francisco Bay, suburban communities in the inland valleys, and along the Sacramento-San Joaquin Delta. Each of these places is unique in terms of its geography, communities, housing stock, commercial zones, shopping districts, industrial centers and workplaces. At the same time, they are connected by well-developed East Bay roadway networks and transit systems, and by an expansive system of regional and local parks, open space, trails and shoreline.

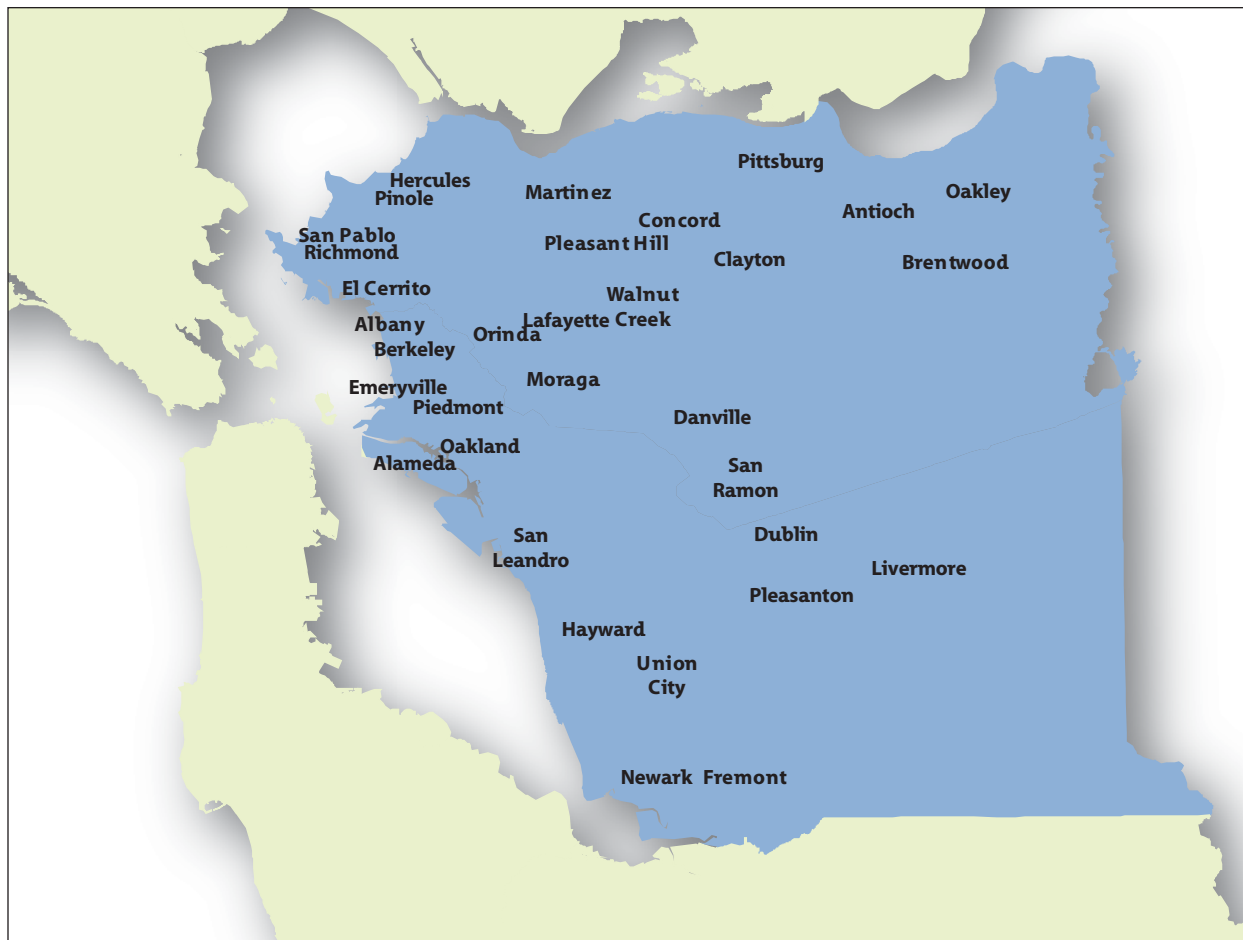


Map of the East Bay region within the 9-County Bay Area

THE EAST BAY REGION

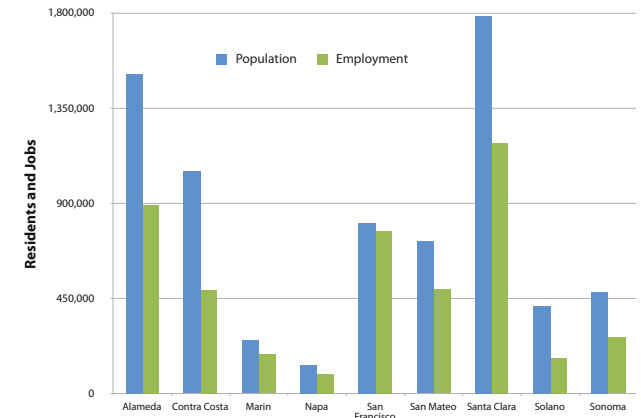
The East Bay has a long history of being populated by different types of people, from Native American inhabited lands through a period as a Mexican territory to the mix of urban and suburban places enjoyed by today's East Bay residents who have migrated here from around the world. In its history, the East Bay has served as an ideal location for

ranching and farming, as a summer vacation site for wealthy San Franciscans, as a place of refuge after the 1906 Earthquake destroyed much of San Francisco, as an intellectual center anchored by UC Berkeley, as an engine of industrial production centered around its deep water Port, as a major research center anchored by three National Laboratories, as the home to three



Map of the East Bay Cities and Communities

Fig 1 Bay Area Population and Employment by County



US Census Bureau American Community Survey 2008-2012, Bureau of Economic Analysis 2012

professional sport teams, and as the birthplace of numerous social movements.

With the attraction of increasing numbers of residents from diverse backgrounds, the factors contributing to the East Bay's quality of life were enriched and multiplied. As educational and research institutions formed new partnerships with private and public ventures, increasing numbers of businesses, large and small, have been attracted to the East Bay. And their presence on the traditional industrial corridors of the East Bay has seeded the growth and development of newer growth areas such as the Tri-Valley. Through business cycles and substantial technological change, the East Bay's quality of life has continued this virtuous cycle of attracting new residents and businesses, which in turn draws additional residents and businesses.

For many households in the Bay Area, the draw of the East Bay is the combination of its central location within the metropolitan job market, the overall quality of life provided, and the range and relative affordability of housing. This “value proposition” draws workers from around the country, from overseas, and from within the Bay Area region. For example, IRS tax filings show net migration into the East Bay from San Francisco, San Mateo, and Santa Clara Counties. Data from 2010/2011 reveal a net increase of more than 3,000 East Bay federal, individual and joint tax filings resulting from this migration.

DIVERSITY OF HOUSING AND COMMUNITIES

Overview: A commonly cited positive attribute of the East Bay is the range of housing options that are available in different environments and communities. Ideal housing for singles, young couples, families and seniors varies in size and format. In addition, the East Bay offers a variety of housing options, from rural to urban, to satisfy different lifestyles and preferences. The East Bay and its 33 towns and cities and its numerous unincorporated communities, provides many options: including multi-family housing in historic and modern buildings in bustling downtowns; single-family detached living for families seeking communities focused on schools and parks; live-work lofts for consultants and artists; as well as numerous other options. From executive housing and rural estates in communities such as Danville,



Pleasanton, and Livermore, to neo-traditional development in Hercules, to lofts and condominiums in downtowns, to boat-houses in marina slips and to communal living in co-operatives, the East Bay offers housing types and designs to meet almost all living preferences.

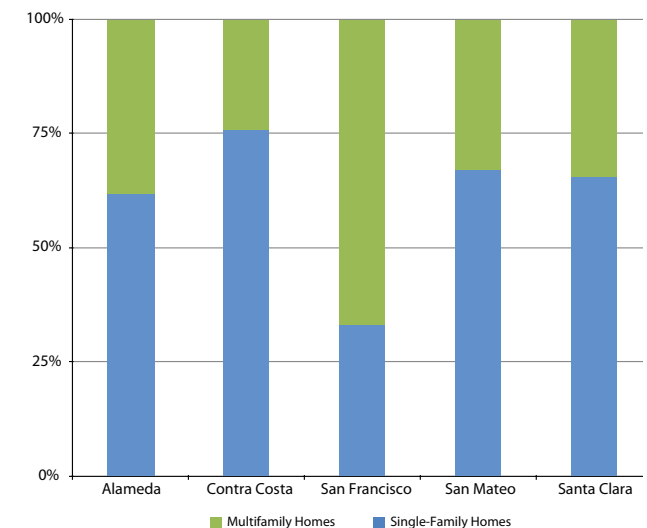
Quality of Life Metric: The California Department of Finance collects information on the housing stock in the State of California. These data, which are available by county, describe the number of housing units and specify the proportions that are single-family versus multi-family homes, that is, housing units in structures with two or more units.

East Bay Data: The East Bay’s housing stock includes a strong proportion, about two-thirds, of more “traditional” single family detached housing spread throughout the cities and communities of the East Bay. The East Bay also offers a substantial proportion

of other housing formats, including townhomes/single family attached homes at 8 percent, mobile homes at 2 percent, and an array of multi-family unit buildings varying in size, height and age at about 30 percent. In addition to this variety of housing, the East Bay, on average, typically has greater availability as measured through vacancy rates reported by the California Department of Finance. For example, the East Bay’s overall vacancy rate among all housing was 6.3 percent at the start of 2014 compared to less than 5.0 percent in San Mateo and Santa Clara Counties.

Reflecting the diversity of the East Bay, there are large differences between the housing stock in

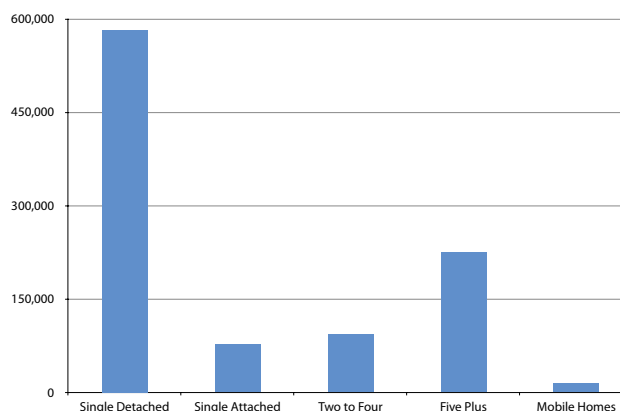
Fig 2 Housing Format Mix by County



Source: State of California Department of Finance 2014

HOUSING AVAILABILITY AND COSTS

Fig 3 East Bay Housing Format Mix



Source: State of California Department of Finance 2014

cities and communities predominantly composed of large single family detached housing, such as those found in the City of Oakley in east Contra Costa County, and the housing stock of other communities characterized by a substantial blend of small-lot single family detached housing as well as apartments and condominiums in downtown and transit-oriented locations. This type of mix can be found in cities such as Berkeley and Oakland. In addition, there are a number of other significant components of the East Bay housing stock, including numerous affordable housing development projects with connected support services aimed at specific community groups, such as families, seniors, disabled populations and others with particular needs. There are a large number of affordable housing groups that have individually and collectively developed affordable housing of all types throughout the East Bay.

Commentary: The availability and diversity of housing options is critical to attracting and maintaining a strong and diverse labor force including singles, couples, and families of all types, incomes and ages. Whether household preference is for an apartment, live-work unit, co-operative living, townhome, small home or a traditional suburban home, the East Bay offers suitable housing for any circumstance or stage of life.

Furthermore, the East Bay continues to plan for additional housing to accommodate the growing numbers of households opting for East Bay living. Consistent with recent State laws (AB 32 and SB375) and local values, much of this new housing is planned for “Priority Development Areas” throughout the East Bay. Often these new developments are on infill and brownfield sites with good transit access and proximity to jobs and retail and are closely vetted by the local communities. For example, the reuse and redevelopment of Alameda Point, the former Alameda

Naval Air Station in the City of Alameda, and the Concord Naval Weapons Station promise to bring thousands of new housing units, millions of new commercial square feet, and numerous recreation offerings to the East Bay. Specific Plans and Master Plans, recently prepared or under preparation, for numerous East Bay downtown, transit-oriented, and infill areas provide substantial additional capacity for new housing and economic development. These future expansions in housing stock will further diversify the living options and help keep housing prices relatively affordable, particularly compared to the more space-constrained regions of the Bay Area.

COST OF HOUSING

Overview: Typically, housing is the most significant component of an individual or family budget. It is a key determinant of cost of living. In many parts of the Bay Area the cost of housing is increasing rapidly. For existing and new Bay Area residents, as in many other dynamic metropolitan areas, the challenge of matching the housing and community preferences of residents with their ability to pay is substantial. Compared with many other counties in the Bay Area, however, the East Bay offers both a lower average housing cost as well as a substantial range of housing prices to fit different household budgets.

Quality of Life Metric: Current market data on home sales and asking rents for apartments illustrate the cost of housing around the Bay Area. RAND California Statistics reports sales data for all homes, including condominiums, townhomes, and single-

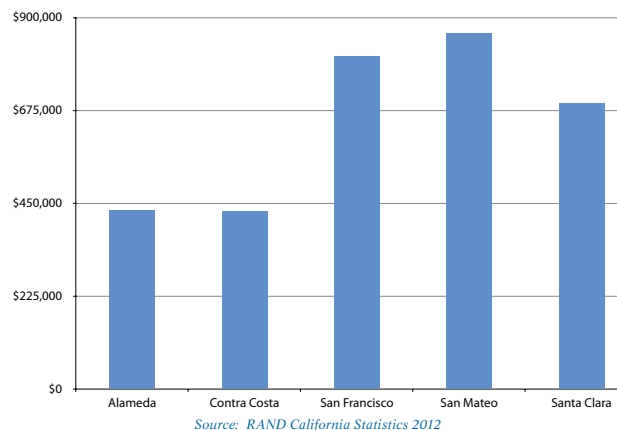


HOUSING AVAILABILITY AND COSTS

family homes. RealAnswers (previously RealFacts) surveys rents in major apartment complexes and reports data quarterly.

East Bay Data: In 2014, the average price for a single family home in the East Bay is about half the price of a home in San Francisco or on the Peninsula, or about two-thirds the price of a home in the South Bay. For those seeking rental housing, the savings can be similar, with average San Francisco rents in newer buildings averaging about 80 percent above those in the East Bay. While there is substantial variation in home prices and rental rates in the East Bay, the average price differentials between the East Bay and San Francisco reflect the impact of a more limited housing stock, a greater influx of highly paid technology workers, and a greater in-flow of wealth from outside the region into San Francisco. As a result, the East Bay market is becoming more varied, inclusive and appealing as new housing and associated prices are designed and developed

Fig 4 Average Home Sale Prices by County (2012)

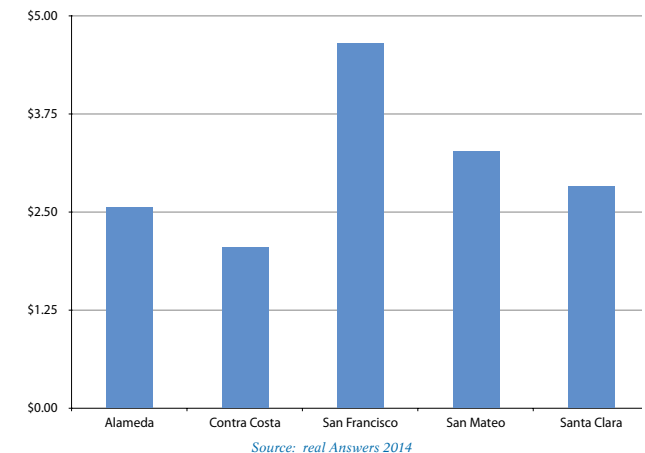


for employees from a range of sectors with a wide variance of salaries and housing preferences. prices are designed and developed for employees from a range of sectors with a wide variance of salaries and housing preferences.

Within the East Bay, there is substantial price variation. For example, 2012 data from RAND California Statistics indicates that the average home in the City of Richmond costs about \$160,000 as compared with \$935,000 in the City of Orinda. These variations are a reflection of differences in characteristics of the home (for example, square feet, number of bedrooms, lot size, views) and characteristics of the community (for example, school quality, public safety, proximity of parks/open space). Still, for several East Bay cities, such as Hercules, the relative affordability of their housing, in combination with their many other attributes, acts as a strong draw.

Commentary: The East Bay housing market shows substantially more flexibility and variety than the housing market in San Francisco, where limited land availability and high land prices mean that new housing supply caters to high income households. In the East Bay, with a greater array of communities and prices, housing supply caters to demand from a broad range of workers in different sectors and different households, including housing products for almost all preferences. With overall housing costs that on average are well below those in San Mateo, Santa Clara, and San Francisco Counties, East Bay residents get a diversity of options and a high quality of life at a substantial discount.

Fig 5 Average Asking Rent 2014 (per square foot per month) by County Major Apartment Buildings Built Since 1980



CONNECTIVITY AND MOBILITY



The East Bay lies at the center of the Northern California MegaRegion and at the heart of the Bay Area. This central location in combination with the impressive array of mobility infrastructure – both within East Bay communities, between East Bay communities, and between the East Bay and other regions – supports accessibility to numerous job submarkets, retail and entertainment amenities, schools, hospitals and other services. In combination with the other quality of life assets described throughout this report, this connectivity acts as another core attraction for new households and workers. The East Bay's connectivity to other regions throughout the U.S. and internationally is also enhanced by the Oakland International Airport that supports about 10 million passengers each year.

TRANSIT

Overview: Public transportation enhances mobility for residents, workers and visitors. Access to public transportation gives people options to get to work, go to school, visit friends or take recreational trips. Public transportation seems to be a regional asset valued by Millennials and technology workers, in particular. Further, public transportation reduces congestion and pollution by reducing automobile trips. Having access to both transit and automobile infrastructure, as well as biking and walking options, allows residents to make their own, practical transportation choices.

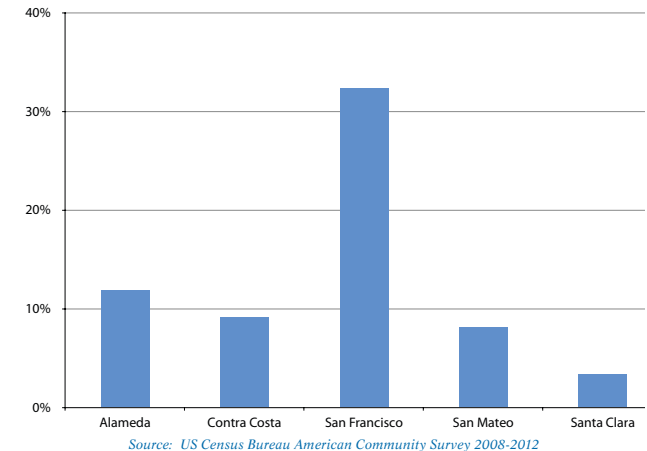
Quality of Life Metric: The U.S. Census reports survey data concerning individuals' means of transportation to work. Data from the American Community Survey reveal the percentage of workers (age 16+) who rely on public transportation, excluding taxicabs, to get to work.



East Bay Data: After San Francisco, East Bay workers use public transit more than any other region. Excluding taxis, 11 percent of East Bay workers commute using public transportation. This is substantially above the California average of 5 percent.

The East Bay offers a broad array of public transit options, including commuter rail, bus, and ferry service. The Bay Area Rapid Transit system (BART) provides heavy rail transit service within the

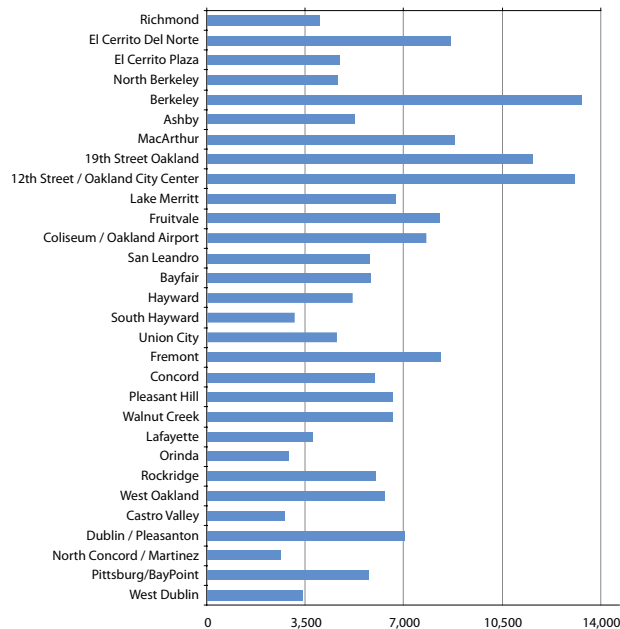
Fig 6 Public Transportation Usage for Commuting by County



urban core of the Bay Area and plays a particularly significant role in the East Bay where 30 of the existing 44 BART stations are located. BART is a heavily used asset, with a total of about 190,000 average weekday exits at East Bay BART stops. In addition to its extensive use for regional commuting, BART also provides quick and efficient access to three professional sport team venues as well as to the Oakland International Airport.

Further expansions of BART and the addition of e-BART in eastern Contra Costa County will further enhance intra-East Bay and inter-regional connectivity. And, with the substantial levels of future new jobs and housing development planned

Fig 7 BART Average Weekday Exits (2014)



Source: BART FY 2014

close to East Bay BART stations, the level and proportion of transit ridership is expected to increase. Other notable transit services available to East Bay residents include Alameda-Contra Costa Transit (AC Transit), County Connection, the ACE train and Bay Ferries. Bay Ferries carry both commuters and tourists from the East Bay year-round. Ferries take a daily average of 616 passengers (416 commuters) from Alameda and 577 passengers (156 commuters) from Oakland to San Francisco, with demand



expected to grow. In addition, local circulators such as the Emery Go-Round, WestCAT, WHEELS, Union City Transit and The B on Broadway provide a variety of options for car-free mobility. With the exception of San Francisco County, no other Bay Area counties can boast the range and use of alternative modes of transportation that exist in the East Bay.

Commentary: The East Bay provides an impressive array of transit options providing low-emissions connectivity between many communities as well as to other areas in the Northern California region. This connectivity supports the East Bay and regional economies, helps mitigate the road congestion common in major metropolitan areas, and supports efforts to improve air quality, reduce greenhouse gas emissions, and meet local and State environmental and climate goals. It also allows East Bay residents to readily access a broad number of urban amenities across a range of cities. For example, the 72 bus along San Pablo Avenue provides ready access to a

number of activity centers including, Old Oakland and City Center, Uptown and the Fox Theater, Café Trieste and the surrounding independent boutiques, and the San Pablo Avenue/University Avenue intersection in Berkeley with its cluster of nearby stores that make up its International Marketplace.

ROADWAYS

Overview: East Bay residents can readily access a broad network of major roadways connecting East Bay cities and subareas to each other as well as to the rest of California and the nation. Interstates 80, 580, 680, 880 and 980, and Highways 4, 13, and 24 are all heavily used roadways supporting the movement of workers, residents and visitors. In combination with the transit options described above, East Bay workers and residents have numerous



CONNECTIVITY AND MOBILITY



ways to move and connect. As a major location for manufacturing, logistics and goods movement, these roadways, along with the Port of Oakland, Oakland International Airport, a Federal Express regional air freight hub and rail freight service are also a critical part of the East Bay's economic industrial infrastructure.

Quality of Life Metric: Road density (road miles per square mile) is a simple indicator of the concentration of roads in an area. The California Statistical Abstract reports the miles of maintained public roads in each county. The road density metric relies on these data combined with geographic data also provided by the Statistical Abstract.

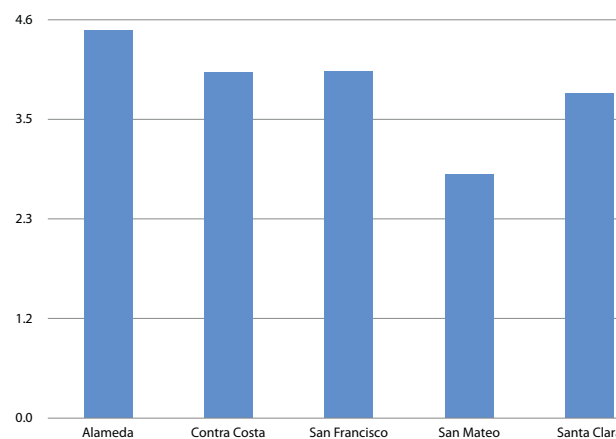
East Bay Data: The East Bay has the highest concentration of public roads of any Bay Area region reflecting the extensive network of freeways, highways and arterials. Still, the level of economic and other activities in the East Bay means that congestion remains high on a number of freeways and roads during peak traffic periods. The availability of carpool lanes, informal carpooling systems, and congestion pricing as well as numerous and growing transit options and strong bicycle and pedestrian infrastructure helps reduce the number of single occupancy vehicles on the roads during peak hours.

Commentary: The extensive network of roadways plays an important role in the East Bay economy, connecting residents with jobs in the East Bay and elsewhere and providing critical infrastructure for the industrial, tourist and other components of the economy. Transportation infrastructure makes the



East Bay a convenient location for residents without cars and a desired location for personal trips or the shipment of goods to San Francisco, the South Bay, the Wine Country, Sacramento, the Central Valley, Lake Tahoe, Yosemite, Monterey, Mendocino and even a direct connection to Los Angeles via Interstate 5.

Fig 8 Miles of Public Road per Square Mile by County



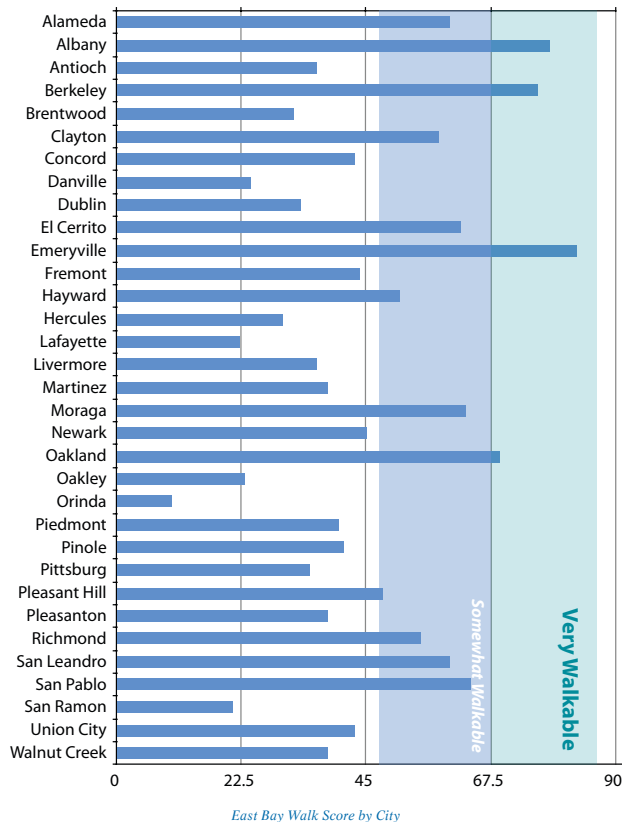
Source: California Statistical Abstract 2008

WALKABILITY

Overview: Living in an area where amenities of daily life – groceries, playgrounds, post offices, libraries and restaurants – are within walking distance promotes a healthy lifestyle and has positive implications for the environment. Research from the University of New Hampshire has also linked walkable neighborhoods with an increase in social benefits.

Quality of Life Metric: Walk Score, a private company, measures the walkability of any address using a patented system. For each address, Walk Score analyzes hundreds of walking routes to nearby amenities. Points are awarded based on the distance

Fig 9 East Bay Walk Score by City



to amenities in each category. Amenities within a 5-minute walk are given maximum points. More distant amenities are awarded fewer points, with no points given after a 30-minute walk. Walk Score also measures pedestrian friendliness by analyzing population density and road metrics such as block length and intersection density.

East Bay Data: The East Bay offers many walkable areas, with a dozen “somewhat” or “very” walkable cities observed in the Walk Score data. The

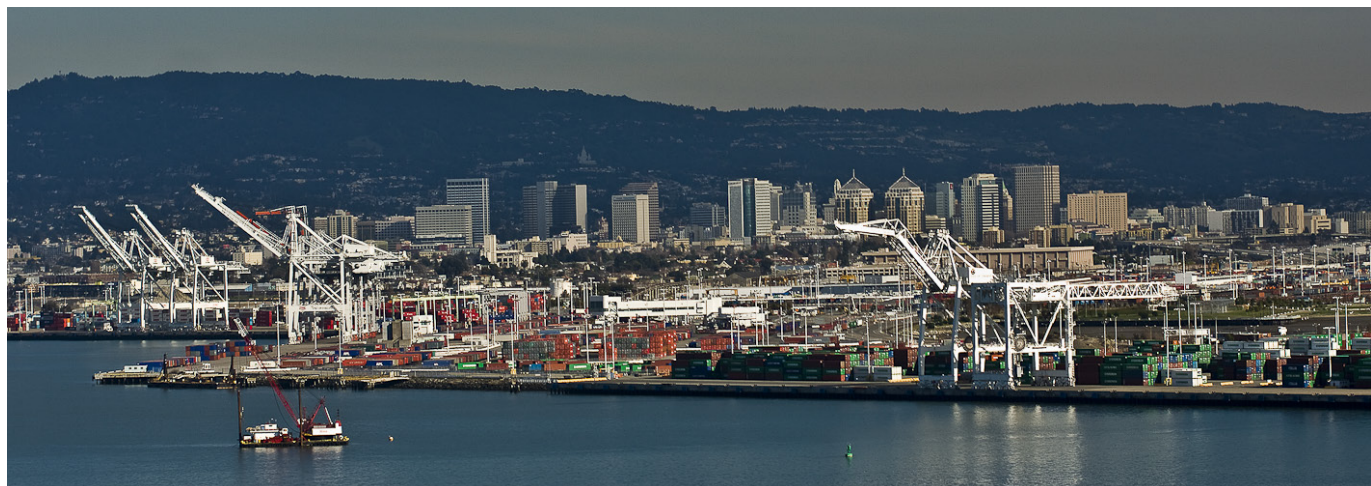
historic street car suburbs of the inner East Bay are particularly walkable. In addition, the Metropolitan Transportation Commission led Bay Area Bike Share program, as part of \$8.7 million of approved expansion funds, is planning to add approximately 750 bikes across Berkeley, Oakland and Emeryville sometime in 2015. Bicycle advocates and program coordinators believe Bay Area Bike Share will enjoy considerable success in the East Bay due to its comprehensive public transit, population density and presence of major colleges and universities. In fact, a recent MTC analysis found that the East Bay had the greatest potential for the expansion of the bike share pilot program.

Commentary: Walkability has positive health outcomes and associated economic and fiscal benefits such as improving worker productivity and reducing healthcare costs. Walkability, along with access to transit and bicycle infrastructure, is becoming

TRANSPORTATION INVESTMENTS

Reflecting the East Bay's commitment to maintain and improve its transportation network and connectivity, voters in Alameda County will be asked to approve a ballot measure in November 2014 to expand and improve transit services, provide fare relief, maintain existing roads, and expand bicycle paths and pedestrian walkways.

increasingly important for workers, in particular the non-driving younger generation as well as increasing numbers of empty nesters. With homebuyers increasingly seeking walkability and neighborhood amenities, the East Bay is well positioned to attract new residents who value and desire compact neighborhoods with access to retail and restaurants. East Bay communities are also making increasing investments in walking and bicycling infrastructure, seeking to ensure access to safe routes for all types of trips.



EDUCATION

A strong, accessible, and varied educational infrastructure is critical to the economic success of a region and its residents. New businesses look for access to the appropriate labor force. New households with, or expecting, children are attracted to communities with a strong network of public elementary, middle and high schools and/or private schools. Similarly, educational institutions often act as drivers of economic development: in attracting new students and potential future workers to a region; in spinning off firms focused on scientific and technological advances; and in ensuring workers at all skill levels are able to expand and adjust their skill sets throughout their careers. The presence of three National Laboratories – Lawrence Berkeley, Lawrence Livermore, and Sandia – that collaborate with educational institutions and public entities, as well as private enterprise, adds further to the educational and innovative nature of the East Bay.

Many of the East Bay's communities provide highly-ranked public schools and top-tier private schools. As the nation's top-rated graduate research institution, UC Berkeley alone acts as a powerful attractor of talent and a catalyst for economic development. The numerous other educational institutions present in the East Bay provide many additional opportunities for advancement. Recently a series of collaborative efforts have made the East Bay a leader in efforts to connect high school, community college and university education to the modern skill sets required for jobs that require science, technology, engineering, and mathematics (STEM) education, including manufacturing and service industries. Overall, East Bay residents are already highly educated with 30% more college graduates and 40% more advanced degree holders than the national average. In addition, East Bay residents receive exposure to a range of cultures and values that provides a valuable form of education that encourages tolerance, open-mindedness, and creativity.

PRIMARY AND SECONDARY EDUCATION

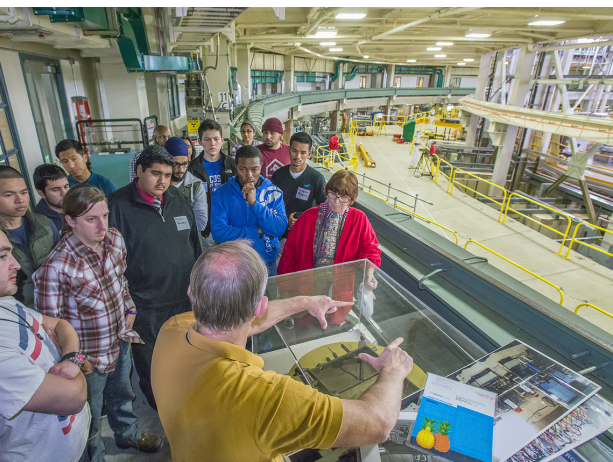
Overview: The economic vitality of a city is linked to the performance of its schools. A National League of Cities' survey of its members in 2000 found that "city officials view the quality of public education and local schools as the cornerstone of their cities' success." Further, a public opinion survey finds that the degree to which public schools "improve the local economy and attract business" is the second most important



benefit schools bring to communities after "benefit [to] families."²

Quality of Life Metric: Standardized test scores provide an assessment of academic performance in local public schools. The California Department of Education Data Reporting Office provides California Standardized Testing and Reporting Program test scores for the state (2012-2013). The tests measure students' progress toward achieving California's state-adopted academic content standards, which describe what students should know and should be able to do in each grade for each subject tested. The test assesses "proficiency," which represents a competent and adequate understanding of the knowledge and skills measured by this assessment.

² Education Week and Public Education Network 2002

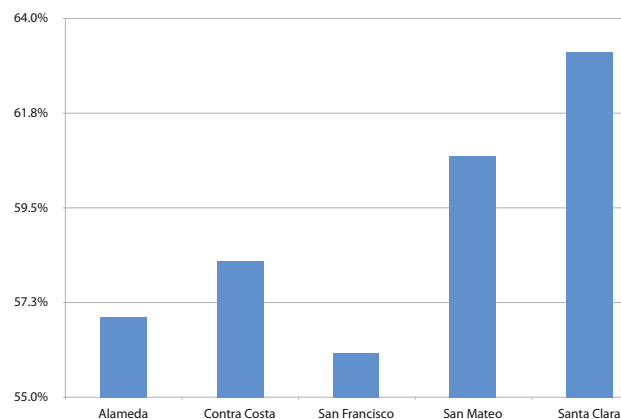


East Bay Data: Test scores in East Bay K-12 public schools are notably better than statewide. East Bay students achieved proficiency in language, math, and science with average scores more than 7 percentage points higher than their peers throughout the state. Within the Bay Area, the East Bay's primary and secondary schools perform better than San Francisco schools. In addition, East Bay counties, along with San Francisco, San Mateo, and Santa Clara, all had pre-school attendance rates, an indicator of future success, in the top one-third among California counties.

The East Bay includes a number of school districts with some of the highest test scores in California along with some of the most prestigious private schools. For example, a ZipRealty study reported by the San Francisco Business Times found that 8 out of the top 10 Bay Area cities for schooling, based on school scores (test scores and student/teacher ratios) and median price per square foot are the East Bay cities of Piedmont, Danville, Pleasanton, Dublin, Albany, Fremont, Castro Valley, and Alameda.⁵ It should be noted that numerous other East Bay communities also offer top-ranked schools.

While some other East Bay school districts achieve below-average test scores, the poor performances often reflect neighborhoods with limited access to educational resources and lack of support outside of school.

Fig 10 K-12 Student Proficiency by County (Language, Math & Science Average)



Source: California Department of Education (2012-13)

Commentary: The strength of the schools in a number of East Bay communities is often a driving force attracting families to the East Bay, including many households who were previously based elsewhere in the Bay Area. In turn, the children from these families frequently return or remain in the East Bay as adults to enjoy the quality of life they became accustomed to as children.

POST-SECONDARY EDUCATIONAL OPPORTUNITIES

Overview: Access to higher education provides opportunities for young adults to enhance their skill sets. In addition, post-secondary institutions contribute to local quality of life through extension programs, open educational programming and collegiate sports events. These institutions contribute

INVESTMENT IN EDUCATION AND CAREER PATHWAYS

Programming and funding in the East Bay are opening doors for students to pursue STEM studies and careers. California State University East Bay's Institute for STEM Education operates several programs to increase interest in STEM disciplines and ensure college readiness in STEM competencies among East Bay K-14 students. The Institute's STEM Career Awareness Day, in partnership with business corporations, attracted 200 science students from six East Bay high schools, while the Math Achievement Academies work with 11 school districts throughout the East Bay to offer supplemental math help in Algebra I, Geometry, and Algebra II. Recent funding from California Career Pathways Trust is funneling nearly \$23 million in state funding to two East Bay collaborative education groups in order to prepare students for careers in disciplines such as health sciences, engineering, and information and communication technologies. The East Bay has established K-12, community college and four-year university relationships that work towards a seamless pathway to career preparation. The Gateways East Bay STEM Network works regionally with 36 school districts and 470,000 K-12 students and, pre-school students, as well as with approximately 200,000 teachers.



⁵ Bay Area cities with the top-ranked school districts, July 2014

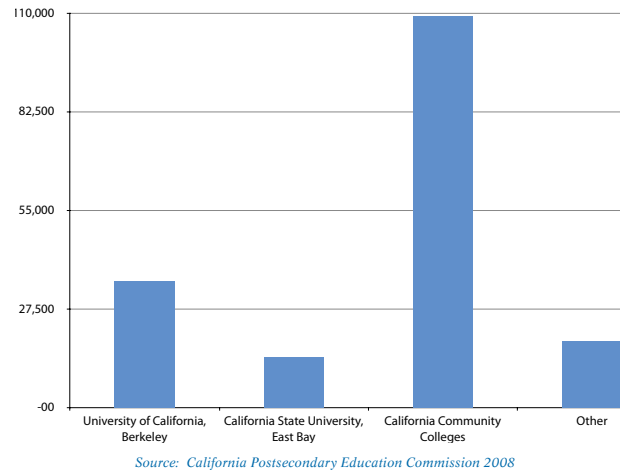
EDUCATION

to a culture of learning that is stimulating for residents and workers in the region.

Quality of Life Metric: Data from the State of California Postsecondary Education Commission tracks enrollment at post-secondary institutions. In some cases underlying data sources only reflect enrollment at colleges, universities, and technical and vocational institutions that participate in the federal student financial aid programs, and thus are not comprehensive.

East Bay Data: There are roughly 200,000 students enrolled in post-secondary education in the East Bay. About 20 percent of these students are enrolled at the University of California, Berkeley, one of the

Fig 11 Higher Education Enrollment in the East Bay (2008)



world's top institutions for learning. Students also are enrolled at a wide range of other schools including University of California universities, California state universities, community colleges, private universities, special need schools and specialized technical schools.

Commentary: The East Bay offers a broad array of post-secondary educational opportunities. The East Bay's universities and other post-secondary institutions are a significant attractor for new residents and a resource for gaining new skills necessary for sustaining employment. The City of Pleasanton, for example, highlighted the educational attainment of its residents and recognized the education and training opportunities available through a collaborative system of community colleges

UC BERKELEY

The University of California, Berkeley, is one of the top educational institutions in the world. The National Research Council has ranked it as the nation's top graduate research institution for several decades. In addition, for the past several years U.S. News and World Report has ranked UC Berkeley as the nation's number one public university for undergraduate education.

UC Berkeley also offers roughly 350 undergraduate and graduate degree programs in a wide range of disciplines to approximately 36,000 undergraduate and 10,000 graduate students.

UC Berkeley brings cutting edge science and research to the East Bay through its partnership with the U.S. Department of Energy's Lawrence Berkeley National Laboratory. In the 2013-2014 fiscal year, UC Berkeley received \$730.7 million in research funding. As of June 2012, the University held 2,493 total active inventions, 302 active license agreements, 641 active U.S. patents, and 503 active foreign patents. University alumni have won 29 Nobel Prizes, while faculty members have won 22. The National Sciences Foundation awarded more Graduate Research Fellowships to UC Berkeley than to those of any other university.

Due to its reputation for excellence, the university attracts highly-skilled talent to the East Bay and acts as an economic development engine for the region. As one indicator of the impact of UC Berkeley's alumni, according to a recent study by Pitchbook, UC Berkeley is ranked second worldwide for producing venture-capital-backed entrepreneurs.

and education support. The City of Pleasanton views this system as an important part of its quality of life and an important draw. Many East Bay residents first come to the region for school and stay because of the quality of life and economic opportunities.





EDUCATIONAL ATTAINMENT

Overview: Adult educational attainment is closely correlated with economic opportunity and financial stability. Educated workers can find jobs in promising fields with livable wages while many businesses will search for locations with a substantial pool of educated workers. Education results in lower rates of unemployment, greater earnings, and the ability to find work in a desirable field. From 1973 to 2008, jobs in the U.S. economy requiring post-secondary education grew from 28 percent to 59 percent.⁴

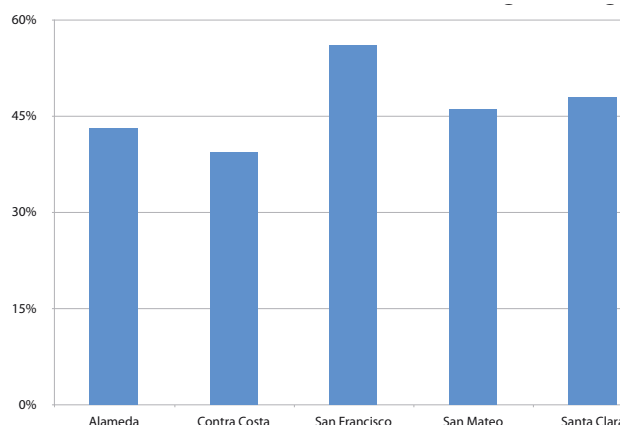
Quality of Life Metric: The U.S. Census Bureau collects self-reported data concerning the educational attainment of adults, ages 25 to 64. The metric assesses the share of working-age adults who have earned a Bachelor's Degree or higher.

East Bay Data: Approximately 42 percent of working-age East Bay residents have earned a bachelor's degree. This is comparable to other Bay Area counties and substantially above the rate statewide of about 31 percent.

UC Berkeley itself is an important driver of these numbers, though the quality of life in the East Bay is a key factor in “retaining” UC Berkeley graduates. Quality of Life is also a factor in attracting educators, researchers, and students from throughout the U.S. and the international community to UC Berkeley.

Commentary: The East Bay's excellent resources for educational improvement are not only a personal benefit to residents, the relatively high educational attainment of East Bay residents has

Fig 12 Adult Educational Attainment (Bachelor's Degree or Higher)



Source: US Census Bureau American Community Survey 2008-2012

also attracted employers to the region, creating new job opportunities. For example, a recent *Diablo Magazine* article argues “a brilliant workforce” is one reason start-ups are drawn to the East Bay. The Chief Operating Officer of Bishop Ranch in San Ramon states, “There’s such a huge employee base here, and companies are locating here because of that.”⁵



⁴ Council of Presidents, 2013

⁵ *Diablo Magazine*, April 2014

NATURAL AMENITIES

The East Bay's Mediterranean climate, San Francisco Bay shoreline access, bay views, parks, open space, and natural habitat are another key contributor to quality of life. While there are different micro-climates within the East Bay, East Bay residents are blessed with extensive sunlight while being buffered from the brutal seasonal chills and overwhelming heat of many other U.S. regions. The local, regional and State parks, and open space provide ready (no-cost/low-cost) access to the outdoors and healthful excursions, places for contemplation and restfulness, and habitats for numerous animal and plant species.



Open space also supports the East Bay's vineyards, grazing and agricultural sectors and provides a range of additional economic and public benefits in the form of ecosystem services, visitor expenditures and user utility.

WEATHER

Overview: The San Francisco Bay Area is known for its appealing Mediterranean (dry-summer subtropical) climate. The weather is generally characterized by dry summers and mild, moist winters. During the summer, winds blow from the Pacific Ocean through the Golden Gate, resulting in cool winds and some fog. The fog is less pronounced than along the western shore of the San Francisco Peninsula, as the East Bay is not bordered by the Pacific Ocean.

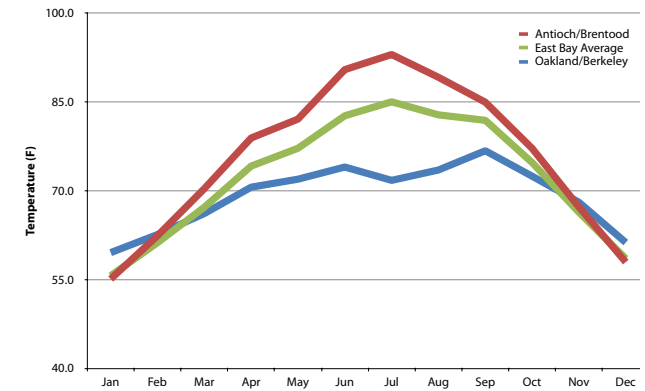
Quality of Life Metric: The U.S. National Oceanic and Atmospheric Administration (NOAA) reports temperature data from 14 weather stations in the East Bay.

East Bay Data: Overall, the data from 2013 indicate that the average daytime high in the East Bay was about 71 degrees. Average daily highs in the East Bay during the summer months peak at just above 80 degrees and fall to just below 60 degrees during the winter. No snowfall was recorded at any East Bay weather station during 2013, though scant snowfall has occurred historically at higher elevations.

The Berkeley/Oakland average daytime high temperature was 69 degrees, peaking at 77 degrees in September and falling to 60 degrees in January.

Meanwhile, the Antioch/Brentwood average daytime high temperature was 76 degrees, peaking at 93 degrees in July and dipping to 56 degrees in January.

Fig 13 East Bay Average Daily High Temperature by Month



Source: National Oceanic and Atmospheric Administration 2013

Commentary: The East Bay's Mediterranean climate acts as a draw to many households escaping less hospitable climates as well as San Franciscans in search of warmer weather. Oakland, for example, gets about 260 days of sun per year, higher than many of the top-ranked international cities (e.g., Copenhagen, Tokyo, and Melbourne).⁶ This natural setting contributes to the growth of a thriving wine industry, outdoor sports and recreation activities and businesses, public celebrations, outdoor entertainment and venues, and other quality of life assets that can only be sustained by the kind of weather and topography the East Bay enjoys.

⁶ Monocle, Issue 75, volume 08, July/ August 2014.

PARKS AND OPEN SPACE

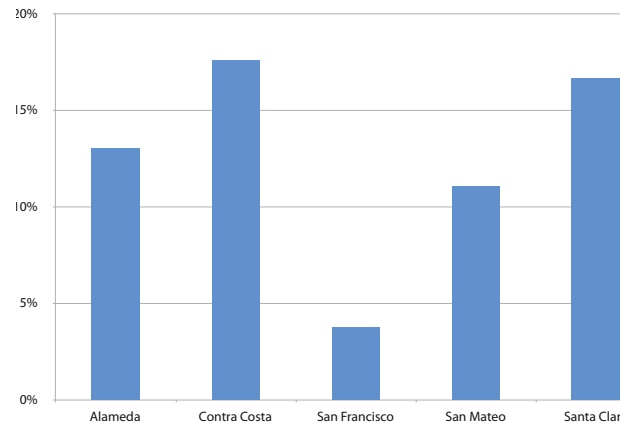
Overview: Local and regional parks have long been recognized as major contributors to the physical and aesthetic quality of neighborhoods and communities, providing areas for recreation and quiet contemplation, as well as natural buffer areas. More recently, the contributions of parks, trails and open space to economic development, community building, public health and ecosystem services have been acknowledged in a range of academic and professional studies.

Quality of Life Metric: GreenInfo Network maintains the California Protected Areas Database (CPAD). CPAD contains data concerning California lands protected for open space purposes and owned, in fee, by agencies and organizations. CPAD statistics include “open access” acreage by county.

East Bay Data: There are more than 250,000 acres of designated open space in the East Bay, nearly one quarter of the region’s land area. Over 15 percent of the East Bay is publicly accessible open space. That is a much greater percentage of land available for outdoor recreation than in San Francisco County or San Mateo County.

The East Bay Regional Park District (EBRPD) is responsible for 65 parks and half of the East Bay’s open space with about 113,000 acres under management. Since its establishment in 1934, the District has made specific efforts to ensure that its investments in establishing regional parks, open spaces, trails and recreation areas are spread throughout the East Bay. As a result, within minutes,

Fig 14 Bay Public-Access Open Space (% of Area) by County



Sources: California Protected Areas Database 2014, California Statistical Abstract 2008

East Bay residents have ready access to regional parks and open space as well as the numerous additional local parks and recreational amenities provided by cities and counties directly. Other regional efforts, like the Bay Trail, have resulted in significant additional investments in a trail system along the shoreline. The EBRPD also reinvests in the community, providing free park activities throughout the East Bay to encourage healthy lifestyles.

Many East Bay cities highlight access to parks and open space as a key component of their quality of life. For example, the City of San Leandro points to its parks and recreation resources, including the 30 acres of public access and recreation provided by Marina Park, and Lake Chabot Regional Park that encompasses city and unincorporated areas. The Town of Danville also notes their parks, regional

trails, open space and historic sites, such as the Eugene O’Neill National Historic Site.

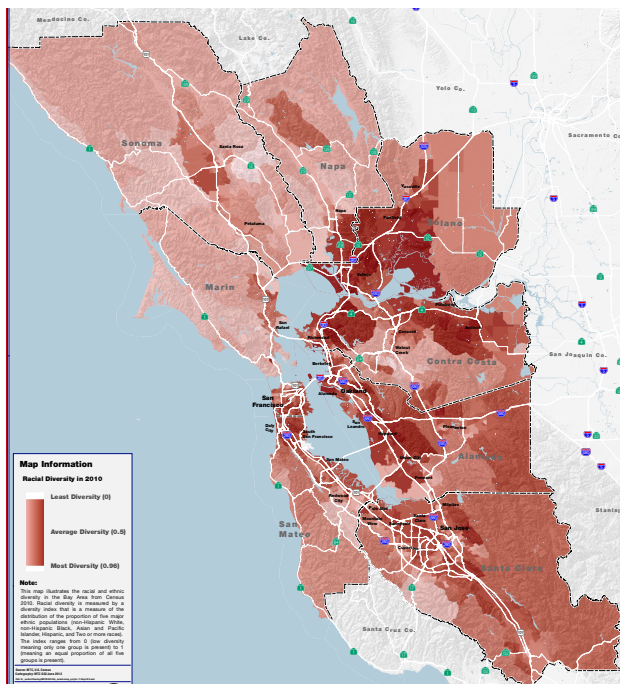
Commentary: The East Bay has one of the most substantial and significant complexes of parks, open space and trails in the nation. Parks and open space in the East Bay are well integrated into the urban environment and offer a diversity of recreational offerings and programming. The East Bay boasts the largest regional park district in the nation and the Trust for Public Land ranks Oakland as the #1 high-density city for parkland acres per resident.⁷



⁷ 2014 City Park Facts, Trust for Public Land

DIVERSITY, CULTURE AND URBAN AMENITIES

The East Bay is perhaps most notable for its unique heterogeneity. This includes its diversity of cultures and places, its inclusiveness, and its creative talent and innovative thinking. The unique make-up of the East Bay in turn generates a vibrant cultural scene where the arts, festivals, food, community gatherings and cultural institutions blend to provide something for everyone, in an environment encouraging residents to participate, interact, enjoy and learn. This heterogeneity also adds unique features to the East Bay's diverse retail and entertainment amenities, while providing a substantial audience for its three major professional sports teams and civic and cultural celebrations.



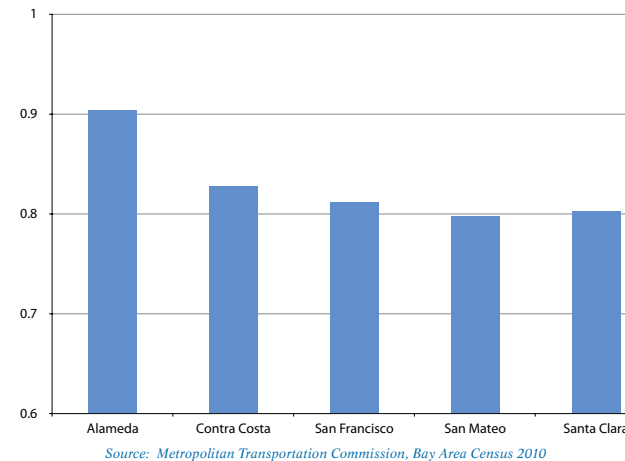
DIVERSITY

Overview: Diversity enhances the range of cultural experiences available in a city or region. For those who appreciate cultural diversity and prefer accepting communities, the cosmopolitan characteristics of international cities can be a significant draw. In many cases, diversity is a magnet for talent. Some economists note that productivity flourishes in culturally diverse cities and that people are willing to pay to live and work in such fertile environments. In *The Rise of the Creative Class*, Richard Florida notes that “regional economic growth is powered by creative people, who prefer places that are diverse, tolerant and open to new ideas.”

In 2001, Oakland became the first city in the nation to pass an Equal Access to Services Ordinance with the purpose of removing language barriers that limited-English speakers may experience in accessing City services. At that time 30% of Oakland residents reported speaking a language other than English at home and over 150 different languages were reported spoken in the city.

Quality of Life Metric: The San Francisco Bay Area's Metropolitan Transportation Commission prepared a racial diversity index based on Census 2010 data. The index reflects the distribution of five major ethnic populations (non-Hispanic White, non-Hispanic Black, Asian and Pacific Islander, Hispanic, and two or more races). The index ranges from 0 (low diversity meaning only one group is present) to 1 (meaning an equal proportion of all five groups is present).

Fig 15 Racial Diversity Index 2010 by County



East Bay Data: The diversity score for the Bay Area is 0.84, as compared with 0.60 for the nation. Within the nine-county Bay Area region, Alameda County is the most diverse while Contra Costa County is more diverse than San Francisco, San Mateo, and Santa Clara Counties. Within the East Bay itself, there is also substantial variation between cities in terms of the level and composition of diversity.

The East Bay is a model of diversity and opportunity. According to the American Community Survey, over 700,000 East Bay residents, including 30.9 percent of residents in Alameda County and 24.9 percent of Contra Costa County residents, are foreign born. The American Community Survey also indicates a higher level of educational attainment among the East Bay foreign born population with about 37.5 percent of the East Bay's foreign born population (age 25+) holding a bachelor's degree versus about 25.5 percent overall for California's foreign born population.

DIVERSITY, CULTURE AND URBAN AMENITIES

A majority, 53 percent, of the East Bay's foreign-born population is from Asia. UC Berkeley hosts over 5,645 international students annually from 120 countries. In Alameda and Contra Costa counties, there are approximately 75,000 English language learners in public schools.

Commentary: The East Bay has a high degree of racial diversity as well as other types of diversity, such as sexual orientation and household and family composition. This heterogeneity, in combination with the associated sense of tolerance and acceptance of those who “think outside the box” has made the East Bay a magnet for creative people from a broad range of cultures and nationalities. In 2012, Fremont ranked number 31 in the top 50 cities in the US for foreign worker, H1B visas with 1,437. In addition, Pleasanton, Oakland and Berkeley all are in the top 200. This diversity provides businesses with substantial access to “the creative class” including

innovators, entrepreneurs, and skilled labor of a variety of types, as well as substantial resources to pursue international trade and tourism. In addition, the East Bay is home to a variety of historic “social rights” movements, and residents and businesses in the East Bay often have a more socially responsive attitude than in other regions.

ARTS, CULTURE AND SPORTS

Overview: Through music, art, sports, architecture and cultural events, we enjoy and celebrate our societal values. Cultural events and attractions can draw new residents and employers, increase tourism, and enhance overall community well-being. Historic buildings help create appealing places, while also providing a visual testimony to our history. Further, people who engage in the arts often help communities thrive.

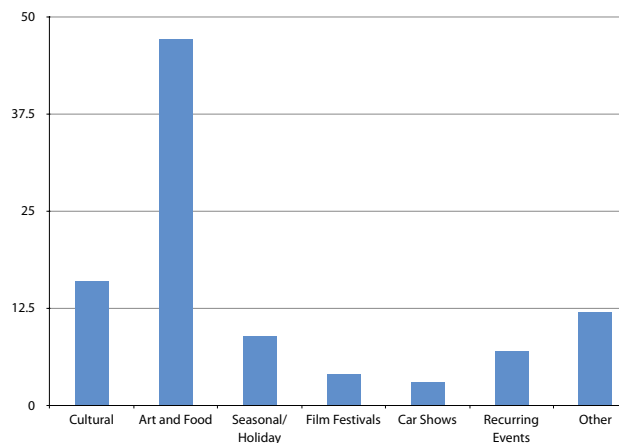
Quality of Life Metric: EPS created a tally of major festivals and events and professional sports games in the East Bay. Museum counts from the Institute of Museum and Library Sciences provide an indication of the cultural richness in the East Bay.

East Bay Data: With about 100 major events and 130 professional sports games annually, as well as over 200 museums, the East Bay is clearly a well-endowed location for art and culture. Art and food culture is strong in the East Bay and this is observable in the number of annual events with this theme.

Reflecting the diversity of the East Bay, there are numerous festivals and annual events that celebrate a

broad range of activities and culture. Indian dancing, food, and vendors attract thousands to Fremont for their annual Festival of India, culminating in a parade of over 50,000 people. Walnut Creek's Art and Wine Festival attracts 100,000 attendees yearly. Art and Soul in Oakland showcases local artists, musicians and culinary treats. The Scottish Highland Gathering and Games brings the largest Celtic festival in the world to Pleasanton each year. Brentwood's Harvest Time Festival complements its draw as a destination point for cherry, apricot and strawberry picking. The Cherry Festival in San Leandro typically draws 20,000 people to its downtown. Oakland Chinatown's StreetFest is one of the largest Asian American festivals in the nation, spanning over 9 city blocks.

Fig 16 Major Events Annually in East Bay

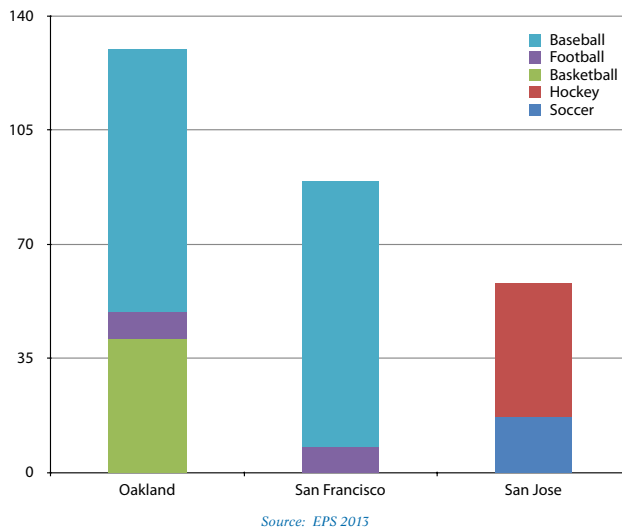


Source: EPS 2013



DIVERSITY, CULTURE AND URBAN AMENITIES

Fig 17 Professional Sports Regular Season Games

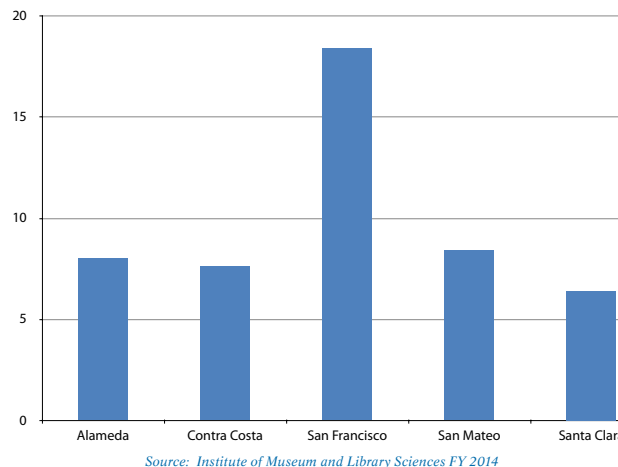


The East Bay hosts a wide variety of music and is home to many well-known, diverse musicians. Tower of Power, Creedence Clearwater Revival, Green Day, The Whispers, Sly and the Family Stone, Eddie Money, MC Hammer, Country Joe and the Fish, and the Greg Kihn Band all started in the East Bay. Within a few blocks in Berkeley one can hear traditional American music at Freight & Salvage, managed by the Berkeley Society for the Preservation of Traditional Music, and local jazz artists at the California Jazz Conservatory. Yoshi's in Oakland is renowned as a Bay Area venue presenting some of the world's best jazz musicians. Other East Bay sites promote ethnic music and dance as part of the East Bay's value of cultural preservation.

In addition to the games played by the East Bay's professional baseball, basketball and football teams, sport events through the universities and community colleges are also offered. And in 2012, the Little League International Board of Directors selected the city of Livermore to be the permanent home of a new Intermediate Division of International Little League competition.

The pleasant climate of the East Bay not only supports sports and outdoor festivals during most of the year, but it also encourages theater and outdoor concert events. A number of venues throughout the East Bay host shows and events, including Orinda's California Shakespeare Theatre – Bruns Amphitheater, Oakland's Woodminster Amphitheater, Berkeley's Greek Theater and the Concord Pavilion, one of the region's largest outdoor concert venues. The Oakland Museum of California and the historic Fox Theater in Oakland, attract thousands to the region, adding to

Fig 18 Museums Per Capita



FOODIE CULTURE

In 1971, Alice Waters opened Chez Panisse in a house in Berkeley with the vision of creating a restaurant built on the principle of using local, seasonal foods. Her small kitchen would soon become the epicenter of the locally sourced, seasonal, organic food movement that has become internationally known as "California Cuisine" and more recently as the "healthy food movement." Chez Panisse has been a major influence on innovative restaurants in the Gourmet Ghetto district of Berkeley and elsewhere in the East Bay, establishing the East Bay as a first class dining destination. Oakland has similarly developed a bustling restaurant scene in recent years, drawing the likes of Michelin-starred chefs Daniel Patterson and James Syhabout.

the cultural, educational, and musical enrichment of East Bay residents and visitors, while also generating spinoff benefits to the surrounding areas.

The East Bay is also home to a broad array of non-profit art and cultural organizations, ranging from internationally-known museums to local theater companies. California Arts Council's (CAC) significant grant making awards to East Bay entities illustrates the importance of the art community in the region. Data show that nearly 20 percent of CAC statewide grant funds for "Artists in Schools" and 10 percent of CAC funds for "Creating Public Value" were awarded to East Bay programs during the 2012-13 grant cycle.

In addition, there are numerous historic sites in the East Bay, including National Historic Landmarks, California State Landmarks and sites recognized by the National Register of Historic Places and the California Register of Historic Places. In Alameda

DIVERSITY, CULTURE AND URBAN AMENITIES

County, there are 208 sites with a historic designation in 15 cities, while in Contra Costa County there are 61 sites in 21 cities. The City of Richmond alone features ten historical sites including Alvarado Park, the Ford Motor Company Assembly Plant and Winehaven. The Rosie the Riveter WWII Home Front National Historical Park in Richmond celebrates the role of women in World War II.

Commentary: Culture is a key ingredient to regional identity and marketing, as well as to our sense of belonging to the places where we live. The East Bay's branding with its sport teams, culinary arts, and historical references creates a source of civic pride and contributes to the region's quality of life.

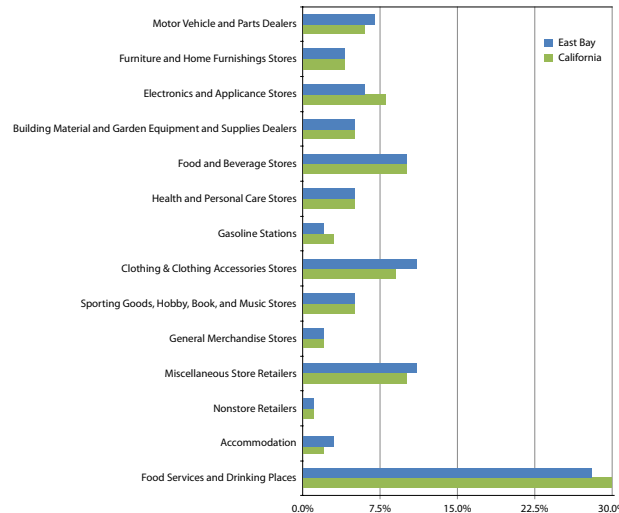
RETAIL STORES, RESTAURANTS AND SERVICES

Overview: Retail, restaurants, and services are desirable amenities for residents and workers, and the presence of these businesses supports community interactions and vibrancy.

Quality of Life Metric: Applied Geographic Solutions (AGS) provides data on retail establishments by store type and geography. This metric compares the distribution of retail stores by type at the state level to that observed in the East Bay.

East Bay Data: The East Bay offers similar retail distribution to that of California overall, indicating that retail is well supplied with a full range of options

Fig 19 **Distribution of Retail Establishments by Type**



Source: Applied Geographic Solutions 2013

– household name stores, unique independents, and ethnic offerings that cater to the East Bay's diversity. The largest Asian supermarket chain, 99 Ranch Market, has seven locations in the East Bay. Fremont hosts Little Kabul and is developing The Globe Mall. Oakland has a sizable Chinatown and a Fruitvale district catering to their Hispanic demographics. The East Bay is also a hub for local, fresh seasonal produce featuring 54 farmers' markets in 28 cities, 6 days a week.⁸

Similarly important is the East Bay's leadership of and support for the local restaurateurs, local makers

⁸ OECD Better Life Index

⁹ Arhoolie Records is an American roots music record-label which has been in continuous operation in the City of El Cerrito since 1960.

and sellers, and other artists and artisans enriching lives through the pursuit of their passions. Long-time independents such as Chez Panisse and Arhoolie Records⁹, as well as recent successes like Blue Bottle Coffee and apparel store Oaklandish, provide competition for major internet retailers. A craft brewing and distillery cluster has also emerged in the East Bay encompassing the cities of San Leandro, Oakland, Alameda and Berkeley.

SHOPPING LOCAL

"Consumers in Oakland have a better understanding of the importance of supporting local business. There is a lot of support for homegrown businesses and people place value on shopping with small businesses." - Angela Tsay, Oaklandish CEO

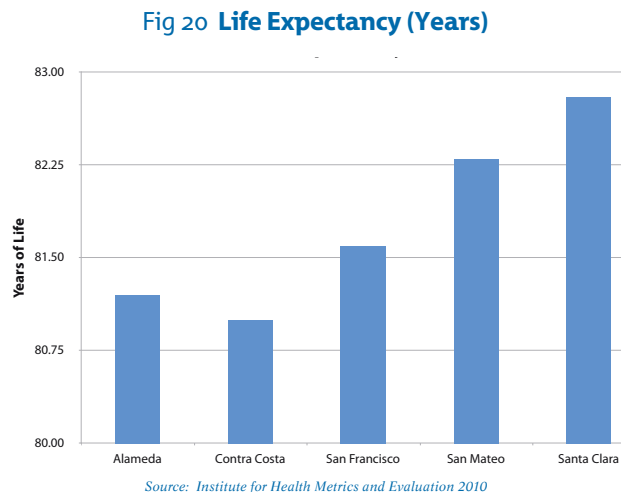
Commentary: From one-of-a-kind boutiques and restaurants to large general merchandise stores, urban villages to outlet malls, the East Bay offers a desirable variety of retail types and formats. Real estate data from the CoStar Group reveal that there are over 123 million square feet of retail space in 12,800 properties located in the East Bay, nearly 50 square feet for each resident. For example, the City of Livermore offers an array of options, including downtown shops and restaurants, wineries, and the Livermore Premium Outlets that attract dozens of international tour buses each week. The walkable retail options in Alameda, Pleasant Hill, Walnut Creek, Brentwood and Emeryville attract large numbers of local, regional and international shoppers. More traditional shopping malls close to transit lines are housed in Pleasanton, San Leandro, Newark and Hayward.

PUBLIC HEALTH AND WELLNESS



Public health, wellness, and safety are critical to any city or region looking to provide a sustainable and prosperous future for its residents and to attract top talent and skilled labor from throughout the U.S. and internationally. As previously noted, the weather and access to parks and open space in the East Bay encourage and engender an active lifestyle, a key contributor to health. The East Bay also is home to a number of leading hospitals and healthcare providers, focused on both prevention and treatment, including Kaiser Permanente, offering one of the nation's largest and highest-rated health plans. The East Bay counties also support medical health systems for safety net and emergency services.

Consistent with an East Bay value of commitment to community, the region has developed a remarkable network of non-profits that fill gaps



where necessary. Public safety is also highly rated in most neighborhoods in East Bay towns and cities. Disparities, however, do exist in some East Bay neighborhoods where air quality and public safety, while improving, still need additional attention. Notable efforts at improvement include coordinated emergency response systems as well as mandated reductions in truck and refinery emissions.

HEALTH

Overview: Good health is one of the most basic elements of happiness and contributes to other benefits such as greater access to education and employment, increased productivity and earning potential, lower health care costs, improved social life, and greater life expectancy.¹⁰

As noted, access to health services is critical to healthy living. Supporting the health objectives of its

¹⁰ OECD Better Life Index

residents, the East Bay offers over 75 health centers and clinics, including comprehensive care, dental, women's health, free clinics and more. East Bay clinics not only range in services to cover all health needs, but also in language and ethnic orientation to serve all East Bay populations. For example, La Clínica de la Raza, with sites throughout the East Bay, is one of the largest community health centers in California. La Clínica delivers health care services in a culturally and linguistically appropriate manner to most effectively address the needs of the diverse populations it serves. In 2013, La Clínica served over 91,000 patients and provided 427,867 patient visits.

Quality of Life Metric: Life expectancy is the most widely used measure of health. The Institute for Health Metrics and Evaluation (IHME) at the University of Washington analyzed the performance of U.S. counties in terms of life expectancy using "small area estimation techniques" and the most up-to-date county-level information.

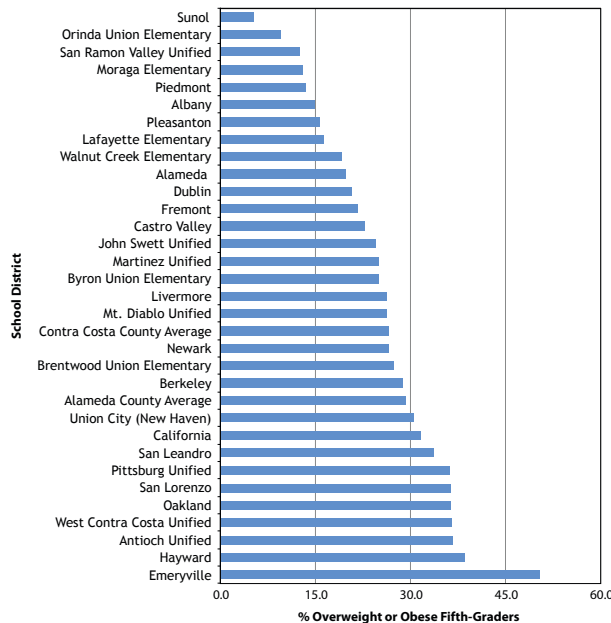
East Bay Data: Life expectancy in the East Bay is over 81 years compared to 79 years nationwide. While life expectancy in the East Bay is slightly below that observed in San Francisco, San Mateo, and Santa Clara, the difference between San Francisco and the East Bay is only about 6 months of life expectancy. Life expectancy has also been linked to race and economic status in the East Bay with pockets of crime and low income connected to lower life expectancy.

Other metrics also provide insights to community health and differences between East Bay communities. Obesity, birth weight, and diabetes

metrics are other common measures. Within the East Bay, the communities of Sunol and Orinda exhibit some of the best metrics for youth obesity, while the City of Oakland falls at the lower end of the spectrum.

Commentary: Overall, the level of human health in the East Bay is quite high due to a combination of access to great health care, availability of parks and open space, and the prevalence of active lifestyles among the region's residents. Further investments and support for health improvements in some communities are still required to combat issues such as obesity and diabetes.

Fig 21 Overweight or Obese Fifth-Graders by School District

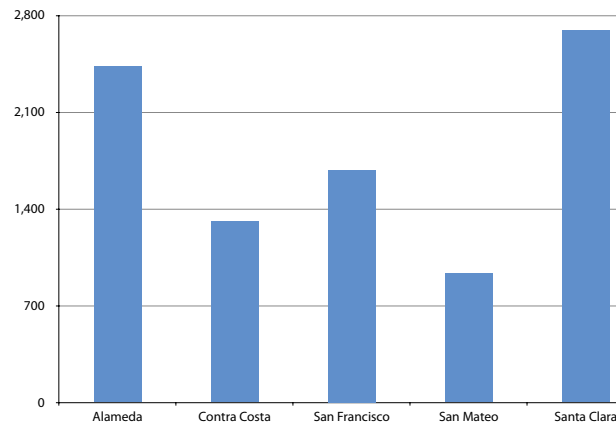


Alameda County Health Department and Contra Costa County Health Services 2010

NON-PROFIT SERVICES

Overview: Other non-profit organizations include education, arts, advocacy, labor, cultural and professional organizations. Many of these organizations enhance quality of life, by improving

Fig 22 Health and Human Services Non-profit Entities



Source: National Center for Charitable Statistics 2014

well-being and contributing to local culture. In particular, a robust network of services is critical to supporting good quality of life and demonstrates a high regional value on building and maintaining a nurturing community.

Quality of Life Metric: The National Center for Charitable Statistics (NCCS) is a repository of data on the nonprofit sector in the U.S. Working closely with the IRS and other government agencies, private sector service organizations, and the scholarly community, NCCS builds compatible national, state and regional databases and develops uniform standards for reporting on the activities of charitable

organizations. NCCS reports the Number and Finances of All Registered 501(c) Nonprofits by county.

East Bay Data: There are more registered health and human services non-profit entities in the East Bay than in any other major sub-region in the Northern California MegaRegion.

Commentary: With education and social policies and public investments generally determined at the state and federal levels, non-profit organizations often step in to provide services where local needs are unmet. Non-profit services are typically most needed by underprivileged populations, but non-profits provide valuable support services to individuals and families from all walks of life.



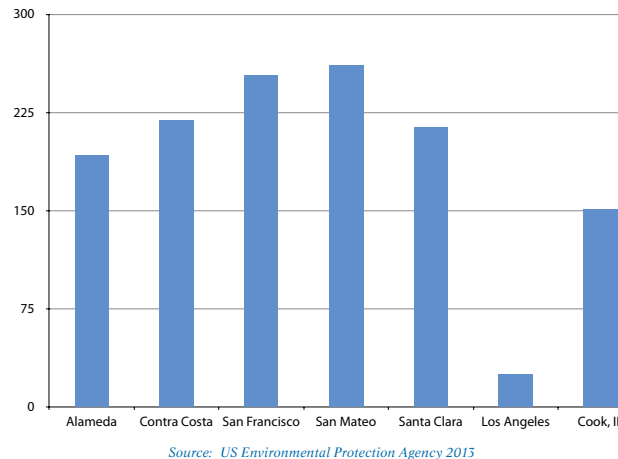
AIR QUALITY HEALTH IMPACT

Overview: Poor air quality can have a number of negative impacts on health, from light irritation to asthma and more serious conditions. Toxic chemicals released in the air can cause cancer, birth defects, long term injury to the lungs, as well as brain and nerve damage. Poor air quality can also have negative effects on our environment, including plants, animals and water quality¹¹.

Quality of Life Metric: The U.S. Environmental Protection Agency (EPA) measures air quality using an index that translates daily air pollution concentrations using a scale of 0 to 500. The scale provides an assessment of whether air quality is acceptable or unhealthy. On “Good” air quality days (score 0-50) no health impacts are expected. At the other end of the spectrum, on “Very Unhealthy” days (score 201-300) everyone, especially children and those with respiratory disease, should avoid or limit outdoor exertion.

East Bay Data and Discussion: Air quality is good in much of the East Bay. However, the East Bay has a significant industrial base, and the Port of Oakland and Oakland International Airport, play a central role in the movement of goods throughout Northern California. As a result, there are areas in need of air quality improvement. The East Bay’s weather plays a large part in providing natural good air circulation, though when the breezes slacken for days on end,

Fig 23 “Good” Air Quality Days (2013)



smog levels and particulate pollution can rise to unhealthy levels in heavily industrialized locations.

On average, the East Bay’s air quality is quite good relative to other economic and industrial centers such as Los Angeles and Chicago though the East Bay average is below several other Bay Area counties. EPA air quality data from 2013 reveal that Alameda County enjoys fewer good air quality days than any other county in the Bay Area. The number of good days in Contra Costa County also is relatively low, but similar to Santa Clara County.

The Bay Area Air Quality Management District identified regions of the Bay Area that experience relatively high levels of toxic air pollution. These areas are typically close to large-scale pollution sources such as freeways, busy roadways, active

goods-movement centers and large industrial sources. With a strong industrial component within the economy, the East Bay suffers some side effects, particularly in the form of air quality impacts.

In response to some of the air quality challenges, substantial efforts have been taken and are under way to make improvements, even as the area continues to grow. In 2009, for example, the Port of Oakland committed to reducing diesel emissions over a 10 year period by 85 percent starting from a 2005 baseline level. By 2012, the Port had already reached a 70 percent reduction. The Richmond City Council voted in August of 2014 to approve the Chevron Refinery Modernization Project, which is expected to lead to a newer, safer, cleaner refinery that will increase energy efficiency and decrease emissions overall. On a broader level, the continued East Bay investments in



¹¹ US EPA, *The Plain English Guide to the Clean Air Act*

transit, bike, and pedestrian infrastructure in the East Bay as well as the planned levels of transit-oriented development will also provide more mobility options and likely fewer emissions. In addition, the East Bay is the home of Tesla's manufacturing facility and is a leader in ownership of hybrid and electric vehicles. The East Bay has 54 public electric vehicle charging stations and two hydrogen fuel cell refueling stations. With strong public support for the environment, this is a trend likely to continue improving air quality.

Commentary: The East Bay has some subareas where air quality could be improved. These areas are typically close to large-scale pollution sources such as freeways, busy roadways, active goods-movement centers and large industrial sources. Nevertheless, new technologies and regulations are already resulting in air quality improvements in the most affected areas, with more improvements expected to come.

PUBLIC SAFETY

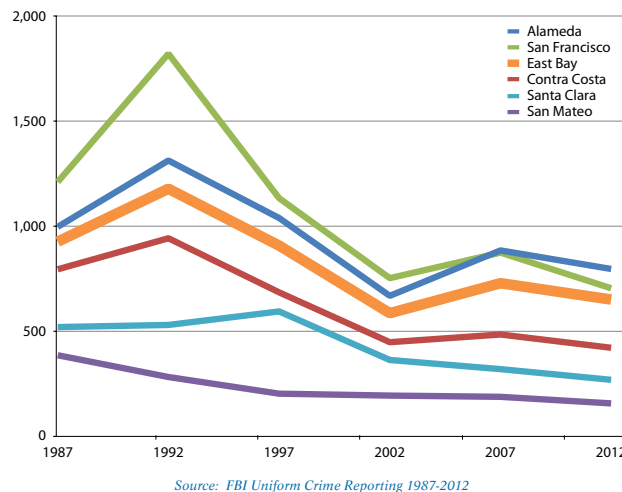
Overview: Public safety plays an important role in the perception of quality of life by residents and workers of a region. Capable, well-staffed police, fire, and emergency response teams provide critical life-saving functions and other important services to the public during emergency events. In addition, low-crime communities are lower-stress, happier places.

Quality of Life Metric: The US Federal Bureau of Investigation (FBI) reports uniform crime statistics for U.S. cities. The data detail violent crime rates

per capita. Violent crime includes murder and non-negligent manslaughter, forcible rape, robbery and aggravated assault. The prevalence of violent crime is an important factor affecting quality of life in a community and a proxy for overall public safety.

East Bay Data: The average rate of violent crime in the East Bay has declined dramatically in recent years

Fig 24 Annual Violent Crime Rate (per 100,000 residents) Trend by County



and is notably lower than in San Francisco.

Commentary: Across the East Bay there are a small number of neighborhoods and communities where crime is more pronounced. These “hotspots” increase the average level of crime observed in the region as a whole. By removing the East Bay’s two most violent “hotspots”, the data reveal an average violent crime rate that is similar to Santa Clara



County. A number of East Bay communities reported exceptionally low crime rates with, for example, Danville, Moraga and Orinda recording fewer than 40 violent crimes per 100,000 in 2012. San Ramon, Pleasanton, Clayton, and Lafayette were also notable for their low rates of violent crime. The Town of Danville noted its high level of public safety as a particular draw for new residents.

CONCLUSION

Quality of life has become a key determinant in the prosperity and growth of regions throughout the world. Workers are drawn to regions that offer a high quality of life, thereby attracting businesses, jobs and more residents. Quality of life assets can also have a range of additional economic impacts that support the local economy.

The East Bay has benefitted from its natural and carefully grown assets, as described in the body of this report. As part of the Bay Area region, the East Bay offers a unique level of quality of life that promises comfort, accessibility, diversity and a range of choices not available in other parts of the Bay Area. These quality of life assets are why residents choose to live in the East Bay and why many companies have moved or expanded in the East Bay.

These assets also have substantial economic impacts of their own beyond their attraction of new businesses and residents as they affect choices in housing, spending, education, recreation, travel and lifestyle. Economic impacts from these assets include, but are not limited to:

- High levels of education and strong educational institutions that drive workforce development and attract substantial State and federal revenues.

- Hospitals and health clinics that, in addition to promoting a healthier and more productive labor force, also create a substantial number of jobs with a range of skill levels and result in a large economic multiplier through the need for a range of supplies and services.
- Sport teams, cultural amenities, and urban amenities that not only create civic pride but retain local dollars in the local economy and attract outside dollars to increase tax revenues that can be used to further provide quality public services and events.
- Historic buildings, downtowns, and other vibrant places that combine with other cultural and urban amenities to build community and support commerce and tourism.
- Natural amenities, in particular the combination of parks, wetlands, open space and East Bay weather, that provide a host of economic and public benefits that attract residents and businesses, improve public health and worker productivity, and provide a range of “ecosystem services” at limited cost – flood control, water quality enhancements, and Co2 sequestration.

These quality of life assets were not available by accident. East Bay residents have worked hard to preserve these natural and developed assets through legislation, environmental stewardship,

cultural preservation, investment, and local policies and programs. The formation of the University of California in the East Bay in the 19th century, the creation of the East Bay Regional Park District, the formation of three National Laboratories, public access to the arts and creation of wetlands, are the result of collaboration, decisions and investments by leaders in a number of different sectors.

As noted in this study, there are still day-to-day challenges associated with congestion, income distribution, public safety, education and housing affordability that are common to most major metropolitan areas. In the East Bay, there are pockets where further improvements in quality of life are required. However, the diverse East Bay population that created and preserved these valued assets will likely take the necessary steps to improve the quality of life for all residents, and indeed, some steps are already in motion.

It is also critical to recognize that in a highly dynamic and competitive environment, quality of life assets should not be taken for granted. The East Bay’s educational, health, natural, cultural and urban amenities all require continued investment if this quality of life is to be maintained for current residents and future generations. As these valuable assets attract a new population and businesses, the importance of these investments and the steps to preserve them will increase.

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