A | MARKET DATA

DEMOGRAPHIC AND EMPLOYMENT CONDITIONS AND TRENDS

This section evaluates demographic and employment conditions and trends within the City of Sunnyvale, as well as the City of Santa Clara given the study area's location right on the border of the two cities. The growth and composition of the cities' populations, including age, income, education, and occupational status, will play an important role in the evolution of both residential and nonresidential land uses. As such, this chapter provides baseline information for use in the more detailed assessments of the housing, office, R&D, and retail sectors provided in this report.

Population and Household Growth Trends

Sunnyvale is the second largest city in Santa Clara County with a population of 140,450 as of 2010 (shown in Table 1). Since 2000, the City's population has expanded at a modest pace of about 0.6 percent per year, for a total increase between 2000 and 2010 of about 8,600 people or 6.5 percent, well under the countywide increase of 11.8 percent during the same period. The number of households in the City grew by 2,000 households or 3.7 percent between 2000 and 2010.

Santa Clara is the third largest city in the County with 118,830 people as of 2010. Between 2000 and 2010, the city's population expanded more quickly than the County, posting a 16.1 percent increase. The number of households in Santa Clara increased by more than 5,300 in the last ten years, or 13.4 percent.

The population in the study area increased even more quickly, growing from 2,260 in 2000 to 2,714 in 2010, for an overall increase of 20 percent. The number of households in the study area increased by approximately 150, or 18.2 percent, during the same period. Footnote 3

As shown in Table 1, Sunnyvale's average household size of 2.56 people and Santa Clara's average household size of 2.66 people are lower than the county's (3.01) and the state's (3.0). This suggests that both cities have lower proportions of households with children than is average for the region. Household size in the study area is 2.85 people per household, higher than the citywide averages but still lower than the County overall.

Age and Income

The demographic compositions of Sunnyvale and Santa Clara reflect the Countywide pattern, although Sunnyvale and Santa Clara have smaller shares of residents under the age of 21 than the County. The cities' populations are more concentrated in the working-aged years (21 to 64 years) than the County's and both cities are more ethnically diverse than the rest of the County. The median household incomes in Sunnyvale and Santa Clara are consistent with the County's—Sunnyvale's is moderately higher and Santa Clara's is somewhat lower. These indices are summarized in Tables 2 and 3 and briefly described below:

- Age: There are fewer children in Sunnyvale and Santa Clara households than there are in the County, with just 25 percent of the Sunnyvale's resident population and 26 percent of Santa Clara's population under the age of 21 compared with 28 percent in the County as a whole, as shown in Table 2. Approximately 20 percent of Sunnyvale's population and 18 percent of Santa Clara's population is aged 55 and older, compared with 19 percent countywide. Sunnyvale's and Santa Clara's shares of residents between the ages of 21 and 54 are 56 percent in each city, compared with the County's share of 52 percent. The age distribution in the study area is somewhat younger, with nearly 27 percent of the population under the age of 21 and only 18 percent aged 55 and older.
- Income: The distributions of household incomes in the cities of Sunnyvale and Santa Clara are consistent with the County's distributions, and the median household incomes are very similar—just under $90,000 (in 2010$). The median household income in the study area is estimated at $75,000 in 2010 dollars, 15 percent below Sunnyvale's median. Approximately 43 percent of all Sunnyvale households and 41 percent of all Santa Clara households earned more than $100,000, according to the American Community Survey from 2005 to 2009 , as shown in Table 3. In the study area, the share of households earning $100,000 or more is lower at 37 percent.

Footnote 3 Population, household, and other demographic data for the study area is provided by Claritas, a recognized and oft-cited source of such information that uses Census data and other information to model details for specific market areas. Note that certain data from Claritas may be based on extrapolations or interpolations from past trends, and thus may not be completely accurate representations of conditions or characteristics in a given study area. For example, Claritas suggests that

Table 1
Population and Households, 2000-2010
Lawrence Station Area Plan; EPS #20088

Area/Item	2000	2010	2000-2010 Number	2000-2010 %	2000-2010 % Annual
Study Area [1]					
Population	3,741	4,292	551	14.7%	1.4%
Households	1,347	1,504	157	11.7%	1.1%
Persons per Household	2.78	2.85	0.08	2.8%	0.3%
Sunnyvale					
Population	131,844	140,450	8,606	6.5%	0.6%
Households	53,787	55,782	1,995	3.7%	0.4%
Persons per Household	2.49	2.56	0.07	2.8%	0.3%
Santa Clara					
Population	102,361	118,830	16,469	16.1%	1.5%
Households	39,630	44,944	5,314	13.4%	1.3%
Persons per Household	2.59	2.66	0.07	2.7%	0.3%
Santa Clara County					
Population	1,682,585	1,880,876	198,291	11.8%	1.1%
Households	579,329	629,508	50,179	8.7%	0.8%
Persons per Household	2.92	3.01	0.09	3.0%	0.3%
State of California					
Population	33,873,086	38,648,090	4,775,004	14.1%	1.3%
Households	12,214,550	13,591,866	1,377,316	11.3%	1.1%
Persons per Household	2.87	2.96	0.08	2.9%	0.3%

[1] 2010 study area figures are 2011 estimates by Claritas.

Sources: Claritas; California Department of Finance; Economic & Planning Systems, Inc.

Table 2
Age Distribution
Lawrence Station Area Plan; EPS #20088

Item	Study Area[1]		Sunnyvale[2]		Santa Clara[2]		Santa Clara County[2]	
	Number	%	Number	%	Number	%	Number	%
Under 21 years	1,172	27%	32,091	25%	28,159	26%	488,701	28%
21 to 34 years	944	22%	31,718	24%	27,837	26%	361,479	21%
35 to 54 years	1,398	33%	41,080	32%	31,953	30%	531,554	31%
55 to 64 years	394	9%	11,272	9%	9,127	8%	163,761	9%
65 to 84 years	346	8%	12,405	10%	9,522	9%	159,082	9%
85 years and over	37	1%	1,690	1%	1,477	1%	24,801	1%
Total	4,291	100%	130,256	100%	108,075	100%	1,729,378	100%

[1] 2011 data for Study Area, taken from Claritas "Pop-Facts: Demographic Snapshot Report", provide a different breakdown of age brackets. Otherwise, data are consistent.
[2] Source: 2005-2009 American Community Survey 5-Year Estimates. Estimates are based on data collected between January 2005 and December 2009 and represent the average over the 5-year period of time.

Sources: Claritas; U.S. Census; American Community Survey; Economic & Planning Systems, Inc.

only 1,500 housing units are occupied in the study area, while there are nearly 1,800 total housing units present in the study area. Claritas data was used as a general indicator of demographic characteristics and trends, but does not rely on this data heavily to inform our market or land use recommendations. The demographic profiles of the study area and the cities of Sunnyvale and Santa Clara, as described above, have important implications for the type of jobs, businesses, and real estate product types that will meet the needs of local residents. For example, affluent and higher educated households typically patronize upscale and/or specialty retail establishments more frequently than do middle class or poorer households. Meanwhile, younger households without children (e.g., single-person households and young couples) tend to have a higher propensity to live in higher density housing than do large families with children. The role of these demographic factors on market demand patterns is discussed further in subsequent chapters by land use category.

Job Profile

Despite growth of certain employment sectors and declines of others, the Sunnyvale/Santa Clara area has experienced relatively little change in its overall economic profile since 2000. A sizable share (44 percent) of the area's jobs are in the Manufacturing, Wholesale, and Transportation Jobs sector, but beyond that concentration, employment appears well distributed across a range of industries. Since 2000, the largest employment sectors have been Manufacturing, Wholesale, and Transportation Jobs (44 percent), Health, Educational, and Recreational Service Jobs (20 percent), and Financial and Professional Service Jobs (18 percent), as shown on Table 4.

Table 3
Household Income Distribution
Lawrence Station Area Plan; EPS #20088

Item	Number of Households/ Amount	% of Total Households
Study Area		
Less than $15,000	76	5%
$15,000 to $34,999	195	13%
$35,000 to $49,999	206	14%
$50,000 to $74,999	254	17%
$75,000 to $99,999	212	14%
$100,000 to $149,999	320	21%
$150,000 or more	243	16%
Total	1,506	100%
Median Household Income (2011$)	$77,595	--
Median Household Income (2010$) [2]	$75,390	
Sunnyvale[1]		
Less than $15,000	2,951	6%
$15,000 to $34,999	5,635	11%
$35,000 to $49,999	4,682	9%
$50,000 to $74,999	7,307	15%
$75,000 to $99,999	7,963	16%
$100,000 to $149,999	10,797	21%
$150,000 or more	10,973	22%
Total	50,308	100%
Median Household Income (2009$)	$87,263	--
Median Household Income (2010$) [2]	$88,458	--

(Table 3 continued on right)

Item	Number of Households/ Amount	% of Total Households
Santa Clara[1]		
Less than $15,000	3,443	8%
$15,000 to $34,999	5,809	14%
$35,000 to $49,999	3,622	9%
$50,000 to $74,999	5,835	14%
$75,000 to $99,999	5,530	14%
$100,000 to $149,999	8,822	22%
$150,000 or more	7,869	19%
Total	40,930	100%
Median Household Income (2009$)	$85,571	--
Median Household Income (2010$) [2]	$86,743	--
Santa Clara County[1]		
Less than $15,000	42,393	7%
$15,000 to $34,999	73,127	12%
$35,000 to $49,999	55,256	9%
$50,000 to $74,999	86,567	15%
$75,000 to $99,999	76,800	13%
$100,000 to $149,999	114,408	20%
$150,000 or more	136,873	23%
Total	585,424	100%
Median Household Income (2009$)	$85,569	--
Median Household Income (2010$) [2]	$86,741	--

[1] 2005-2009 American Community Survey 5-Year Estimates. Estimates are based on data collected between January 2005 and December 2009 and represent the average characteristics over the 5-year period of time.
[2] Deflated or Inflated to 2010$ for comparison purposes according to the Consumer Price Index.

Sources: Claritas; 2005-2009 American Community Survey;

Compared with the County, the Sunnyvale/Santa Clara area has a lower percentage of jobs in the Retail Jobs and the Health, Educational and Recreational Service Jobs categories and a higher percentage of jobs in the Manufacturing, Wholesale and Transportation Jobs category.

The City of Sunnyvale's top employers include a significant number of businesses in the high technology/internet industry (shown on Table 5), although the largest employer, Lockheed Martin Corporation (9,300 employees), is in the Aerospace industry. It is estimated that the City's top ten large employers account for more than 30 percent of total jobs in the City.

It is important to note that despite recent increases in unemployment resulting from the current economic downturn, the Sunnyvale/Santa Clara area's economy is faring well relative to the county and state. As shown in Table 6, as of February 2011, Sunnyvale's unemployment rate was 8.8 percent and Santa Clara's was 9.4 percent. The County's unemployment rate during the same period was 10.3 percent and the state's was 12.3 percent.

Commute and Work Location Patterns

The Sunnyvale/Santa Clara area is located along the Highway 101 commute shed between San Francisco and San Jose. Commute and workplace trends provide information on a community's role in a regional economy as well as the job and lifestyle choices and options of local residents. As shown on Table 7, data on the work location and commute patterns of employed Sunnyvale and Santa Clara residents reflects the cities' roles as a desirable place to live for professionals who work in the larger Silicon Valley Area. Of Sunnyvale and Santa Clara workers, only 15 and 13 percent, respectively, live in the city in which they work indicating a major inflow of workers in each city. Related to this, both cities have far more jobs than employed residents, indicating that they are major employment centers.

ABAG Population and Employment Projections

As part of this analysis, population and employment growth projections developed by ABAG in 2009 was reviewed. ABAG provides projections for the jurisdictions in the nine Bay Area counties through 2035. The ABAG projections are developed with input from local and regional agencies and jurisdictions and are used as critical input to major regional planning efforts such as the Regional Transportation Improvement Program (RTIP), the Air Quality Management Plan (AQMP), and the Regional Housing Needs Assessment (RHNA).

These projections incorporate "policy-based" considerations such as focusing growth toward existing and planned regional centers and transit areas as a well as a gradual increase in mixed-use, high-density development and a reversal of job-housing imbalances.

The ABAG projections for Santa Clara County and the cities of Sunnyvale and Santa Clara are provided in Table 8. As shown, Sunnyvale's population is projected by ABAG to increase by 30,000 between 2010 and 2035, or 0.8 percent per year. The city is projected to gain 13,600 households over the next 25 years (by 2035), which represents an average annual growth rate of 0.9 percent. If these projections are accurate, they would represent an increase from population and household growth rates in recent years (the city has grown at an average annual rate of 0.3 percent since 2000). Population growth in the city has been much slower than the countywide average over the past decade.

The City of Santa Clara is expected to grow by 42,500 residents and 17,000 households between now and 2035, or 1.3 percent per year. These projections represent annual growth rates that are similar to the County's and only slightly higher than observed growth rates in Santa Clara in the last decade.

On the employment side, ABAG's projections suggest that Sunnyvale and Santa Clara will experience relatively strong job growth over the next 25 years, after a decade of job losses. Between 2000 and 2010, Sunnyvale lost 21.6 percent of its 2000 employment base and Santa Clara lost 18.9 percent, while the county lost 13.2 percent during the same period. Looking ahead, Sunnyvale is projected to add 32,190 jobs by 2035, which represents an overall increase of more than 40 percent (from 2010 levels) or an average annual growth rate of 1.4 percent (also shown in Table 8). Santa Clara is expected to add 47,190 jobs in the next 25 years, for an overall increase of 44.2 percent at an annual growth rate of 1.5 percent. The county's job growth is expected to outpace both cities' (a 56 percent increase over 25 years compared with 41 percent in Sunnyvale and 44 percent in Santa Clara).

Table 4
Office Market Indicators
Lawrence Station Area Plan; EPS #20088

Industry	2000 Number	2000 % of Total	2010 Number	2010 % of Total	2020 Number	2020 % of Total	2035 Number	2035 % of Total	2010-2035 Number	2010-2035 % Change
Sunnyvale										
Agriculture and Natural Resources Jobs	120	0%	130	0%	120	0%	120	0%	-10	-8%
Manufacturing, Wholesale and Transportation Jobs	50,070	50%	36,260	46%	39,900	47%	47,560	43%	11,300	31%
Retail Jobs	8,210	8%	6,090	8%	5,700	7%	8,770	8%	2,680	44%
Financial and Professional Service Jobs	17,690	18%	12,530	16%	13,940	16%	19,030	17%	6,500	52%
Health, Educational and Recreational Service Jobs	13,010	13%	14,440	19%	15,510	18%	20,610	19%	6,170	43%
Other Jobs [1]	10,430	10%	8,560	11%	10,190	12%	14,110	13%	5,550	65%
Total, All Industries	99,530	100%	78,010	100%	85,360	100%	110,200	100%	32,190	41%
Santa Clara										
Agriculture and Natural Resources Jobs	220	0%	160	0%	140	0%	140	0%	-20	-13%
Manufacturing, Wholesale and Transportation Jobs	60,160	46%	44,130	41%	47,100	40%	54,730	36%	10,600	24%
Retail Jobs	9,280	7%	7,210	7%	8,510	7%	12,010	8%	4,800	67%
Financial and Professional Service Jobs	26,230	20%	21,270	20%	23,790	20%	33,450	22%	12,180	57%
Health, Educational and Recreational Service Jobs	20,260	15%	22,140	21%	25,300	21%	35,700	23%	13,560	61%
Other Jobs [1]	15,540	12%	11,840	11%	13,260	11%	17,910	12%	6,070	51%
Total, All Industries	131,690	100%	106,750	100%	118,100	100%	153,940	100%	47,190	44%
Sunnyvale and Santa Clara Combined										
Agriculture and Natural Resources Jobs	340	0%	290	0%	260	0%	260	0%	-30	-10%
Manufacturing, Wholesale and Transportation Jobs	110,230	48%	80,390	44%	87,000	43%	102,290	39%	21,900	27%
Retail Jobs	17,490	8%	13,300	7%	14,210	7%	20,780	8%	7,480	56%
Financial and Professional Service Jobs	43,920	19%	33,800	18%	37,730	19%	52,480	20%	18,680	55%
Health, Educational and Recreational Service Jobs	33,270	14%	36,580	20%	40,810	20%	56,310	21%	19,730	54%
Other Jobs [1]	25,970	11%	20,400	11%	23,450	12%	32,020	12%	11,620	57%
Total, All Industries	231,220	100%	184,760	100%	203,460	100%	264,140	100%	79,380	43%
Santa Clara County										
Agriculture and Natural Resources Jobs	4,560	0%	4,500	0%	4,500	0%	4,500	0%	0	0%
Manufacturing, Wholesale and Transportation Jobs	346,520	33%	272,920	30%	312,290	29%	372,850	26%	99,930	37%
Retail Jobs	100,570	10%	83,620	9%	97,420	9%	139,530	10%	55,910	67%
Financial and Professional Service Jobs	211,250	20%	165,360	18%	200,440	19%	282,920	20%	117,560	71%
Health, Educational and Recreational Service Jobs	247,530	24%	269,520	30%	324,360	30%	428,250	30%	158,730	59%
Other Jobs [1]	133,700	13%	110,350	12%	132,970	12%	184,570	13%	74,220	67%
Total, All Industries	1,044,130	100%	906,270	100%	1,071,980	100%	1,412,620	100%	506,350	56%

[1] Includes Construction, Information, and Government.

Sources: ABAG 2009 Projections; Economic & Planning Systems, Inc.

Table 5
Top Sunnyvale Employers
Lawrence Station Area Plan; EPS #20088

Company	Industry	Location	Employees	% of Total Citywide Employment
Lockheed Martin Corporation	Aerospace	Moffett Park	9,296	9.73%
Yahoo! Inc	Internet	Moffett Park	4,906	6.54%
Network Appliance Inc	Communications	Moffett Park	2,620	3.49%
Juniper Networks Inc	High-Performance Network Infrastructure	Moffett Park	2,200	2.93%
Northrup Gruman Marine Systems	Manufacturing		1,200	1.60%
Applied Materials Inc	Nanotechnology Manufacturing	Oakmead	1,035	1.38%
West Valley Eng Inc	Professional Staffing	Perry Park	1,088	1.45%
Maxim Integrated Products	Manufacturing	Oakmead	946	1.26%
Palm Inc	Smart Phone R&D	Perry Park	849	1.13%
Synopsys Inc	Electronic Automation	Perry Park	821	1.10%

Sources: City of Sunnyvale 2010 Comprehensive Annual Financial Report; Economic & Planning Systems, Inc.

Table 6
Unemployment Rates, 2000-2011
Lawrence Station Area Plan; EPS #20088

Area	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011[1]
Sunnyvale	2.6%	4.3%	7.2%	7.2%	5.5%	4.6%	3.8%	4.0%	5.1%	9.3%	9.6%	8.9%
Santa Clara	2.8%	4.6%	7.7%	7.6%	5.9%	4.9%	4.1%	4.3%	5.4%	10.0%	10.2%	9.5%
Santa Clara County	3.1%	5.1%	8.4%	8.3%	6.4%	5.3%	4.5%	4.7%	6.0%	10.9%	11.1%	10.3%

[1] As of March 2011

Sources: California Employment Development Department; Economic & Planning Systems, Inc.

Table 7
Sunnyvale and Santa Clara Commute Patterns, 2009
Lawrence Station Area Plan; EPS #20088

Item	Sunnyvale Amount	Sunnyvale %	Santa Clara Amount	Santa Clara %
Residents				
Place of Work				
San Jose	8,955	17.7%	9,674	24.3%
Sunnyvale	7,274	14.4%	3,681	9.2%
Santa Clara	4,678	9.3%	6,411	16.1%
Palo Alto	4,592	9.1%	2,432	6.1%
Mountain View	3,965	7.8%	2,086	5.2%
Cupertino	2,017	4.0%	1,259	3.2%
San Francisco	1,800	3.6%	1,189	3.0%
Fremont	1,218	2.4%	1,072	2.7%
Milpitas	1,182	2.3%	992	2.5%
Menlo Park	961	1.9%	-	-
Campbell	-	-	682	1.7%
All Other Locations	13,887	27.5%	10,392	26.1%
Total	50,529	100.0%	39,870	100.0%
Workers				
Place of Residence				
San Jose	21,730	29.0%	29,751	33.6%
Sunnyvale	7,274	9.7%	4,678	5.3%
Santa Clara	3,681	4.9%	6,411	7.2%
Fremont	3,662	4.9%	3,945	4.5%
Cupertino	2,301	3.1%	2,130	2.4%
Milpitas	2,209	3.0%	2,478	2.8%
San Francisco	1,912	2.6%	1,919	2.2%
Mountain View	1,621	2.2%	1,265	1.4%
Campbell	1,069	1.4%	1,258	1.4%
Palo Alto	1,058	1.4%	-	-
Saratoga	-	-	1,095	1.2%
All Other Locations	28,313	37.8%	33,695	38.0%
Total	74,830	100.0%	88,625	100.0%
Ratio of Employed Residents to Jobs	**0.68**		**0.45**	

Sources: U.S. Census Bureau, OnTheMap Application and LEHD Origin-Destination Employment Statistics (Beginning of Quarter Employment, 2nd Quarter of 2002-2009); Economic & Planning Systems, Inc

Table 8
ABAG Population, Households, Jobs, and Household Income Projections
Lawrence Station Area Plan; EPS #20088

									2000-2010			2010-2035		
Area/Item	**2000**	**2005**	**2010**	**2015**	**2020**	**2025**	**2030**	**2035**	Number	%	Avg. Annual	Number	%	Avg. Annual
City of Sunnyvale														
Population	133,086	134,300	137,300	143,900	149,900	155,100	161,500	167,300	4,214	3.2%	0.3%	30,000	21.8%	0.8%
Households	52,837	53,560	54,680	57,130	59,890	62,650	65,470	68,290	1,843	3.5%	0.3%	13,610	24.9%	0.9%
Jobs	99,530	73,740	78,010	81,600	85,360	92,850	101,570	110,200	-21,520	-21.6%	-2.4%	32,190	41.3%	1.4%
Mean Household Income [1]	$111,700	$88,500	$93,700	$97,700	$102,500	$107,600	$113,500	$119,600	-$18,000	-16.1%	-1.7%	$25,900	27.6%	1.0%
Median Household Income [2,3]	$87,436	$69,276	$73,346	$76,477	$80,234	$84,227	$88,845	$93,620	-$14,090	-16.1%	-1.7%	$20,274	27.6%	1.0%
City of Santa Clara														
Population	102,361	109,400	114,700	120,700	128,800	138,600	148,200	157,200	12,339	12.1%	1.1%	42,500	37.1%	1.3%
Households	38,526	41,510	43,410	45,510	48,940	52,780	56,620	60,430	4,884	12.7%	1.2%	17,020	39.2%	1.3%
Jobs	131,690	104,920	106,750	111,560	118,100	127,080	140,050	153,940	-24,940	-18.9%	-2.1%	47,190	44.2%	1.5%
Mean Household Income [1]	$102,100	$81,500	$84,000	$86,800	$91,200	$94,600	$100,100	$106,000	-$18,100	-17.7%	-1.9%	$22,000	26.2%	0.9%
Median Household Income [2,4]	$81,628	$65,158	$67,157	$69,395	$72,913	$75,631	$80,029	$84,746	-$14,471	-17.7%	-1.9%	$17,589	26.2%	0.9%
Santa Clara County														
Population	1,682,585	1,763,000	1,822,000	1,945,300	2,063,100	2,185,800	2,310,800	2,431,400	139,415	8.3%	0.8%	609,400	33.4%	1.2%
Households	565,863	595,700	614,000	653,810	696,530	739,820	785,090	827,330	48,137	8.5%	0.8%	213,330	34.7%	1.2%
Jobs	1,044,130	872,860	906,270	981,230	1,071,980	1,177,520	1,292,490	1,412,620	-137,860	-13.2%	-1.4%	506,350	55.9%	1.8%
Mean Household Income [1]	$118,400	$97,900	$108,700	$114,600	$120,900	$127,600	$134,600	$142,000	-$9,700	-8.2%	-0.9%	$33,300	30.6%	1.1%
Median Household Income [2,5]	$80,551	$66,604	$73,951	$77,965	$82,251	$86,810	$91,572	$96,606	-$6,599	-8.2%	-0.9%	$22,655	30.6%	1.1%

[1] In 2005$
[2] Reported by 2000 U.S. Census in 1999 dollars. Inflated to 2005 dollars based on consumer price index for the San Francisco-Oakland-San Jose metropolitan area as reported by the Bureau of Labor Statistics.
[3] Assumes the ratio of median income to mean income will remain constant at 78% (average ratio in 2000).
[4] Assumes the ratio of median income to mean income will remain constant at 80% (average ratio in 2000).
[5] Assumes the ratio of median income to mean income will remain constant at 68% (average ratio in 2000).

Sources: Association of Bay Area Governments (ABAG); U.S. Census; Bureau of Labor Statistics; Economic & Planning Systems, Inc.

Table 9
Housing Units, 2000 and 2010
Lawrence Station Area Plan; EPS #20088

Area/Item	2000 [1]		2010 [1]		2000-2010		
	Number	% of Total	Number	% of Total	Number	%	% Annual
Sunnyvale							
Single Family - Detached	21,020	39.1%	21,281	38.2%	261	1.2%	0.1%
Single Family - Attached	3,927	7.3%	5,475	9.8%	1,548	39.4%	3.4%
Subtotal, Single Family	24,947	46.4%	26,756	48.0%	1,809	7.3%	0.7%
Multifamily	24,744	46.0%	24,930	44.7%	186	0.8%	0.1%
Other	4,096	7.6%	4,096	7.3%	0	0.0%	0.0%
Total	53,787	100.0%	55,782	100.0%	1,995	3.7%	0.4%
Santa Clara							
Single Family - Detached	17,645	44.5%	18,696	41.6%	1,051	6.0%	0.6%
Single Family - Attached	3,588	9.1%	3,791	8.4%	203	5.7%	0.6%
Subtotal, Single Family	21,233	53.6%	22,487	50.0%	1,254	5.9%	0.6%
Multifamily	18,288	46.1%	22,348	49.7%	4,060	22.2%	2.0%
Other	109	0.3%	109	0.2%	0	0.0%	0.0%
Total	39,630	100.0%	44,944	100.0%	5,314	13.4%	1.3%
Santa Clara County							
Single Family - Detached	323,913	55.9%	337,234	53.6%	13,321	4.1%	0.4%
Single Family - Attached	52,739	9.1%	56,567	9.0%	3,828	7.3%	0.7%
Subtotal, Single Family	376,652	65.0%	393,801	62.6%	17,149	4.6%	0.4%
Multifamily	182,999	31.6%	216,027	34.3%	33,028	18.0%	1.7%
Other	19,678	3.4%	19,680	3.1%	2	0.0%	0.0%
Total	579,329	100.0%	629,508	100.0%	50,179	8.7%	0.8%

[1] Figures as of January 1 of the year.

Sources: California Department of Finance; Economic & Planning Systems, Inc.

Table 10
Housing Tenure, 2000-2009
Lawrence Station Area Plan; EPS #20088

Item	2000		2009		2000-2009	
	Number	% of Total	Number	% of Total	Number	% Change
Sunnyvale[1]						
Owner-Occupied Units	25,024	47.6%	24,586	48.9%	-438	-1.8%
Renter-Occupied Units	27,515	52.4%	25,722	51.1%	-1,793	-6.5%
Total	**52,539**	**100.0%**	**50,308**	**100.0%**	**-2,231**	**-4.2%**
Santa Clara[1]						
Owner-Occupied Units	17,763	46.1%	18,954	46.3%	1,191	6.7%
Renter-Occupied Units	20,763	53.9%	21,976	53.7%	1,213	5.8%
Total	**38,526**	**100.0%**	**40,930**	**100.0%**	**2,404**	**6.2%**
Santa Clara County[1]						
Owner-Occupied Units	338,661	59.8%	350,525	59.9%	11,864	3.5%
Renter-Occupied Units	227,202	40.2%	234,899	40.1%	7,697	3.4%
Total	**565,863**	**100.0%**	**585,424**	**100.0%**	**19,561**	**3.5%**

[1] Source: 2005-2009 American Community Survey 5-Year Estimates. Estimates are based on data collected between January 2005 and December 2009 and represent the average over the 5-year period of time.

Sources: U.S. Census; American Community Survey; Economic & Planning Systems, Inc.

Table 11
Historical Average Sales Prices in Sunnyvale, Santa Clara and Surrounding Communities (All Homes)
Lawrence Station Area Plan; EPS #20088

Location	2002	2003	2004	2005	2006	2007	2008	2009	2010
Sunnyvale	$483,136	$486,458	$557,599	$680,584	$702,484	$727,677	$676,501	$566,611	$587,167
Santa Clara	$451,314	$475,264	$539,368	$643,049	$663,174	$656,285	$590,056	$504,028	$511,208
Mountain View	$537,925	$536,916	$611,049	$730,444	$748,736	$799,490	$847,611	$735,785	$747,208
Palo Alto	$784,042	$1,032,705	$878,560	$1,142,556	$1,017,351	$1,332,535	$1,479,465	$1,329,023	$1,408,906
San Jose	$443,997	$456,418	$530,704	$637,482	$675,000	$674,392	$560,266	$465,738	$479,379
Milpitas	$416,812	$425,793	$502,688	$606,667	$627,500	$628,638	$538,729	$404,979	$423,125

Sources: RAND; Economic & Planning Systems, Inc.

Table 12
Recently Sold and For Sale Home Prices
Lawrence Station Area Plan; EPS #20088

Address	Date Sold	City	Zip	Price	Sq.Ft.	Price/Sq.Ft.
Homes Recently Sold						
3372 Vincent Drive	1/13/2011	Santa Clara	95051	$565,000	1,753	$322
1049 Bougainvillea Ter.	1/7/2011	Sunnyvale	94086	$840,000	2,051	$410
2387 Stanford Place	1/7/2011	Santa Clara	95051	$296,500	1,868	$159
1141 Reed Ave. #C	12/30/2010	Sunnyvale	94086	$213,500	917	$233
1047 Sitka Ter.	12/29/2010	Sunnyvale	94086	$656,000	1,791	$366
617 Timberpine Ave.	12/29/2010	Sunnyvale	94086	$995,000	3,960	$251
3388 Machado Ave.	12/17/2010	Santa Clara	95051	$677,000	1,425	$475
3464 Notre Dame Dr.	12/14/2010	Santa Clara	95051	$202,500	1,368	$148
1190 Myrtle Dr.	12/3/2010	Sunnyvale	94086	$615,000	1,148	$536
2544 Crystal Dr.	11/30/2010	Santa Clara	95051	$350,000	897	$390
1113 Columbine Ave.	11/30/2010	Sunnyvale	94086	$728,815	1,300	$561
483 Virginia Pine Ter. [1]	11/23/2010	Sunnyvale	94086	$450,000	1,056	$426
3211 Monroe St.	11/19/2010	Santa Clara	95051	$374,931	897	$418
483 Wild Cherry Ter. [1]	11/19/2010	Sunnyvale	94086	$459,000	-	-
1085 Reed Ave. #A	11/18/2010	Sunnyvale	94086	$301,000	1,084	$278
Average				$514,950	1,434	$331
Median				$459,000	1,300	$366
Homes for Sale						
480 Virginia Pine Ter. [1]		Sunnyvale	94086	$559,000	1,238	$452
485 Tan Oak Ter. [2]		Sunnyvale	94086	$563,999	1,414	$399
1049 Bougainvillea Ter.		Sunnyvale	94086	$850,000	2,051	$414
1095 Reed Ave. #B		Sunnyvale	94086	$294,995	1,081	$273
1129 Reed Ave. #C		Sunnyvale	94086	$285,000	1,215	$235
1103 Reed Ave. #B		Sunnyvale	94086	$255,000	917	$278
1121 Reed Ave. #C		Sunnyvale	94086	$299,000	1,215	$246
1113 Columbine Ave.		Sunnyvale	94086	$619,900	1,300	$477
Average				$465,862	1,304	$347
Median				$429,000	1,227	$338

[1] Part of KB Homes' Bordeaux Community.
[2] Part of older townhome development just past KB Homes development

Sources: Trulia; Economic & Planning Systems, Inc.

Table 13
Average Change in Sales Prices from Peak to Present (All Homes)
Lawrence Station Area Plan; EPS #20088

Location	2007	2008	2009	2010	2007-2010 Amount	2007-2010 % Change
All Homes						
Sunnyvale	$727,677	$676,501	$566,611	$587,167	-$140,510	-19.3%
Santa Clara	$656,285	$590,056	$504,028	$511,208	-$145,077	-22.1%
Santa Clara County	$810,885	$753,036	$626,910	$641,097	-$169,788	-20.9%
Single-Family						
Sunnyvale	$754,614	$684,865	$604,297	$615,167	-$139,447	-18.5%
Santa Clara	$740,688	$654,257	$547,264	$565,708	-$174,980	-23.6%
Santa Clara County	$892,877	$823,646	$688,773	$712,234	-$180,643	-20.2%
Multi-Family						
Sunnyvale	$604,609	$542,396	$479,042	$482,127	-$122,482	-20.3%
Santa Clara	$537,056	$448,786	$398,493	$376,202	-$160,854	-30.0%
Santa Clara County	$556,534	$488,074	$412,605	$412,158	-$144,376	-25.9%

Sources: RAND; Economic & Planning Systems, Inc.

Table 14
Apartment Rents in Study Area
Lawrence Station Area Plan; EPS #20088

Address	City	Zip Code	Studio	1 Bedroom low to high			2 Bedroom low to high		
Reed Square Apartments 1070 Reed Avenue	Sunnyvale	94086		$1,200			$1,400		
1141 Reed Avenue	Sunnyvale	94086					$1,500		
Riverdeck Apartments 1180 Reed Avenue	Sunnyvale	94086		$1,450			$1,575		
Cedartree Apartments 2420 Pacific Drive	Sunnyvale	94086		$1,375			$1,495		
Balmoral Apartments 3585 Agate Drive	Santa Clara	95051					$1,850	to	$2,075
3548 Agate Drive #11	Santa Clara	95050	$925				$1,295		
Willowbend Apartments & Townhomes 1035 Aster Ave.	Sunnyvale	94086		$1,225	to	$1,420	$1,495	to	$1,795
Waterstone 3707 Poinciana Dr.	Santa Clara	95051		$1,460	to	$1,500	$1,570	to	$1,745
Heritage Park Apartments 555 E. Washington	Sunnyvale	94086		$1,295	to	$1,325	$1,595	to	$1,625
The Highlander 620 Iris Ave.	Sunnyvale	94086		$1,230	to	$1,315	$1,385	to	$1,635
Renaissance 718 Old San Francisco Rd.	Sunnyvale	94086		$1,565	to	$1,815	$2,045	to	$2,375
Windsor Ridge 829 E. Evelyn Ave.	Sunnyvale	94086		$1,371	to	$1,594			
Bristol Commons 732 E. Evelyn Ave.	Sunnyvale	94086		$1,486			$1,599	to	$1,699
678 Bellflower Ave.	Sunnyvale	94086					$1,685	to	$1,720
1141 Miramar Way	Sunnyvale	94086		$1,100			$1,300		
Montecito 3765 Tamarack Ln.	Santa Clara	95051		$1,504			$1,824	to	$2,004
Average			**$925**	**$1,425**			**$1,713**		

Sources: Trulia; various individual apartment websites; Economic & Planning Systems, Inc.

Table 15
Residential Absorption (2000 through 2010)
Lawrence Station Area Plan; EPS #20088

Area/Item	2000 [1] Number	2010 [1] Number	2000-2010 Number	2000-2010 # per Year
Sunnyvale				
Single Family - Detached	21,020	21,281	261	26
Single Family - Attached	3,927	5,475	1,548	155
Subtotal, Single Family	24,947	26,756	1,809	181
Multifamily	24,744	24,930	186	19
Other	4,096	4,096	0	0
Total	53,787	55,782	1,995	200
Santa Clara				
Single Family - Detached	17,645	18,696	1,051	105
Single Family - Attached	3,588	3,791	203	20
Subtotal, Single Family	21,233	22,487	1,254	125
Multifamily	18,288	22,348	4,060	406
Other	109	109	0	0
Total	39,630	44,944	5,314	531
Santa Clara County				
Single Family - Detached	323,913	337,234	13,321	1,332
Single Family - Attached	52,739	56,567	3,828	383
Subtotal, Single Family	376,652	393,801	17,149	1,715
Multifamily	182,999	216,027	33,028	3,303
Other	19,678	19,680	2	0
Total	579,329	629,508	50,179	5,018

[1] Figures as of January 1 of the year.

Sources: California Department of Finance; Economic & Planning Systems, Inc.

Table 16
Retail Market Summary Year End 2010, Shopping Centers 50,000 Square Feet and Greater
Lawrence Station Area Plan; EPS #20088

Location	Centers	Total GLA	Availability [1] Anchor	Availability [1] Shop	Availability [1] Total	Vacancy 2010	Avg. Asking Rate (Shop) [2]	Market Rent Range [2]
Sunnyvale	16	1,754,696	10,470	47,628	58,098	3.3%	$18.81	$12.00-$47.40
Santa Clara	15	1,923,801	0	140,601	140,601	6.8%	$34.37	$22.20-$48.00
Combined	**31**	**3,678,497**	**10,470**	**188,229**	**198,699**	**5.4%**	**$26.95**	**$12.00-$48.00**
West County [3]	54	6,121,515	127,996	207,315	335,311	5.5%	$32.29	$12.00-$47.40
Santa Clara County	233	31,375,766	843,961	1,267,743	2,111,704	6.7%	$24.89	$7.20-$50.00

[1] As of year end 2010.
[2] Per square foot per year.
[3] Includes Palo Alto, Mountain View, Los Altos, Sunnyvale, Cupertino, Saratoga, and Los Gatos.

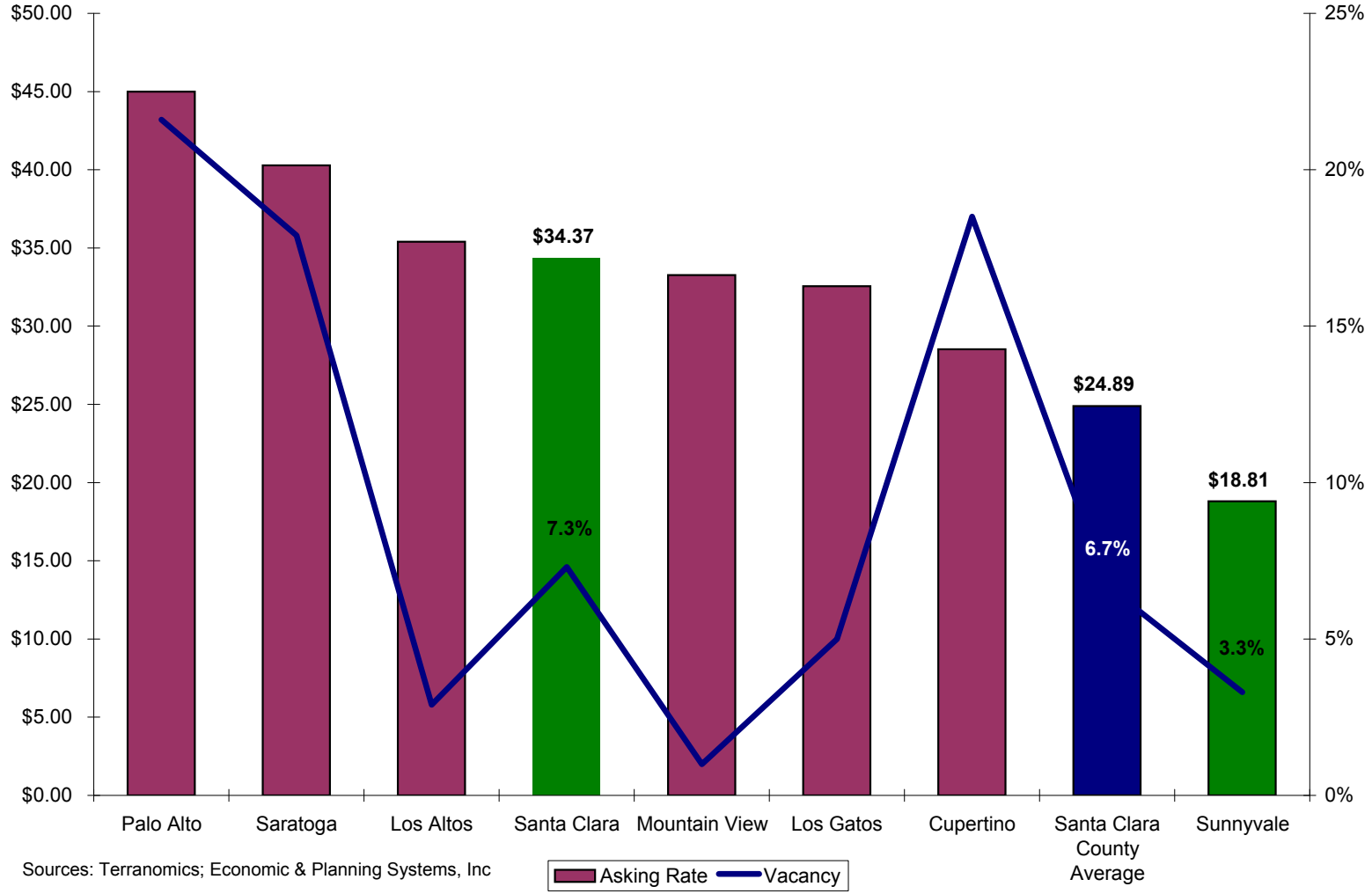
Sources: Terranomics Santa Clara County Retail Report Year-End 2010; Economic & Planning Systems, Inc.

Table 17
Retail Market Summary, Shopping Centers 50,000 Square Feet and Greater
Lawrence Station Area Plan; EPS #20088

	2008		2009		2010	
Item	Mid-Year	Year-End	Mid-Year	Year-End	Mid-Year	Year-End
Sunnyvale						
Vacancy	2.1%	2.7%	2.6%	2.6%	3.6%	3.3%
Asking Rate	$32.86	$28.44	$34.39	$34.71	$19.63	$18.81
Total GLA	1,524,174	1,524,174	1,754,696	1,754,696	1,754,696	1,754,696
Santa Clara						
Vacancy	0.8%	1.0%	6.8%	6.8%	7.1%	7.3%
Asking Rate	$36.17	$36.62	$38.16	$38.16	$35.50	$34.37
Total GLA	2,034,932	2,034,932	1,923,801	1,923,801	1,923,801	1,923,801
Combined						
Vacancy	1.4%	1.7%	4.8%	4.8%	5.4%	5.4%
Asking Rate	$34.75	$33.12	$36.36	$36.51	$27.93	$26.95
Total GLA	3,559,106	3,559,106	3,678,497	3,678,497	3,678,497	3,678,497

Sources: Terranomics Santa Clara County Retail Report; Economic & Planning Systems, Inc.

Figure 1: Q4 2010, Retail Vacancy and Asking Rates



Sources: Terranomics; Economic & Planning Systems, Inc

Figure 2: Sunnyvale Grocery Stores

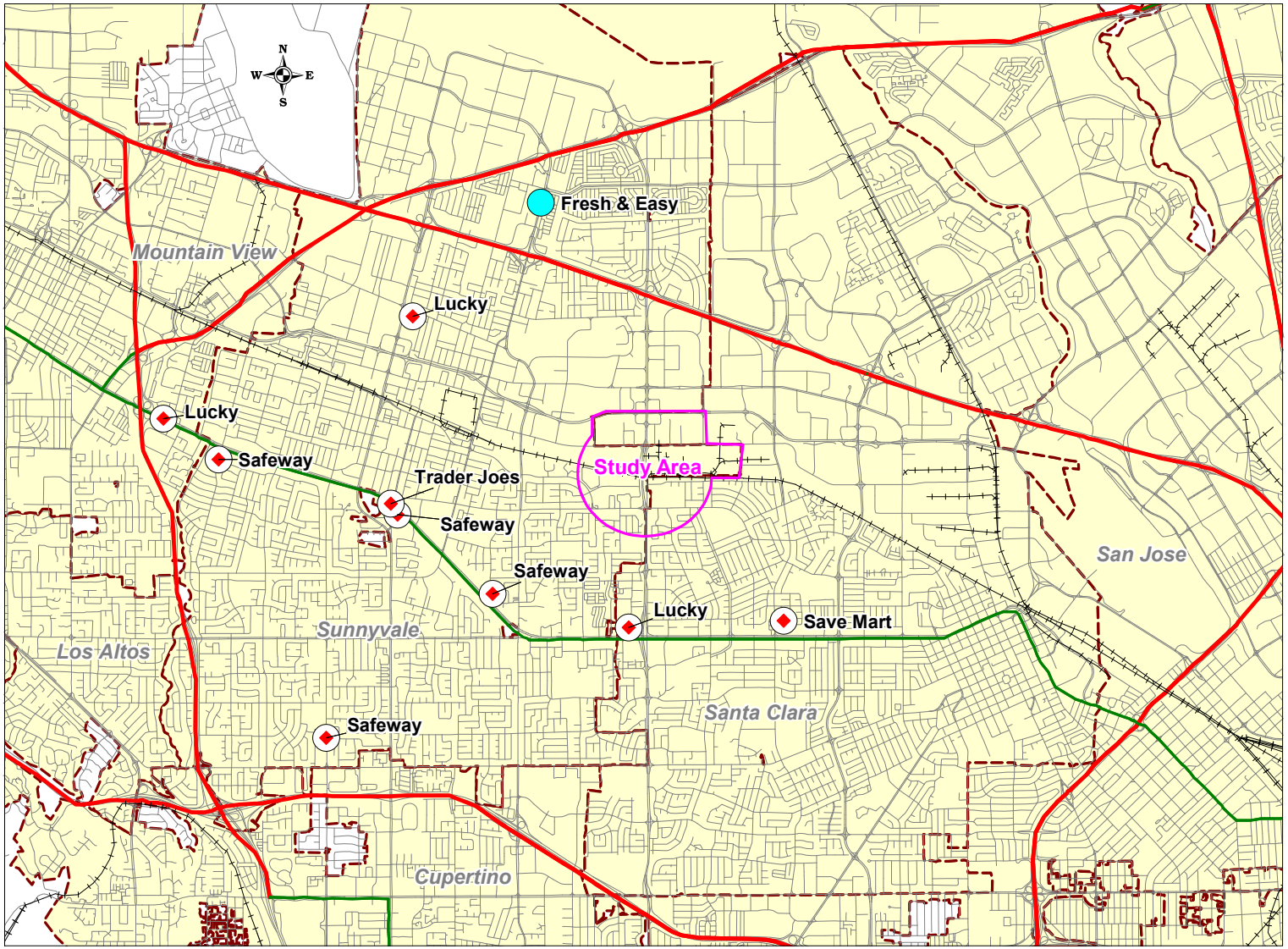


Table 18
Office Market Indicators
Lawrence Station Area Plan; EPS #20088

	2007	2008				2009				2010				2011
Item	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2 [1]	Q3	Q4	Q1
Sunnyvale														
Net Rentable Area	3,085,684	2,855,684	3,928,100	3,928,100	4,598,806	5,296,887	5,263,887	5,263,887	5,252,367	5,252,367		5,493,162	5,653,770	5,787,955
Net Absorption	-39,334	19,228	141,116	20,499	-31,393	-20,350	-68,474	-2,346	241,092	23,021		3,575	227,637	867,232
Vacancy Rate	16.9%	17.6%	33.5%	33.0%	44.3%	51.8%	53.4%	53.4%	48.9%	48.4%		45.8%	43.2%	29.4%
Avg. Asking Rate														
Class A	$3.05	$3.05	$3.11	$3.52	$3.47	$3.35	$2.85	$2.85	$2.55	$2.50		$2.65	$2.71	$2.85
Class B	$2.20	$2.20	$2.24	$2.60	$2.49	$2.40	$2.05	$2.05	$1.93	$1.93		$1.94	$2.00	$2.15
Santa Clara														
Net Rentable Area	8,811,504	8,811,504	8,826,758	8,210,364	8,624,166	8,684,433	8,684,433	9,003,651	8,958,651	8,943,451		8,475,747	8,475,747	8,480,687
Net Absorption	48,607	-85,287	-150,082	-36,516	-95,669	-208,248	-453,866	-88,430	-107,915	366,904		-204,009	116,951	-85,849
Vacancy Rate	10.4%	11.3%	13.0%	14.4%	13.1%	15.1%	20.3%	20.3%	21.2%	16.9%		18.4%	18.7%	19.7%
Avg. Asking Rate														
Class A	$3.21	$3.31	$3.35	$3.35	$2.95	$2.85	$2.55	$2.24	$2.20	$2.10		$2.04	$2.04	$2.04
Class B	$2.23	$2.23	$2.27	$2.27	$2.25	$2.20	$1.95	$1.75	$1.70	$1.65		$1.56	$1.65	$1.67
Combined														
Net Rentable Area	11,897,188	11,667,188	12,754,858	12,138,464	13,222,972	13,981,320	13,948,320	14,267,538	14,211,018	14,195,818		13,968,909	14,129,517	14,268,642
Net Absorption	9,273	-66,059	-8,966	-16,017	-127,062	-228,598	-522,340	-90,776	133,177	389,925		-200,434	344,588	781,383
Vacancy Rate	12.1%	12.8%	19.3%	20.4%	24.0%	29.0%	32.8%	32.5%	31.4%	28.6%		29.2%	28.5%	23.6%
Avg. Asking Rate														
Class A	$3.17	$3.25	$3.28	$3.41	$3.13	$3.04	$2.66	$2.47	$2.33	$2.25		$2.28	$2.31	$2.37
Class B	$2.22	$2.22	$2.26	$2.38	$2.33	$2.28	$1.99	$1.86	$1.79	$1.75		$1.71	$1.79	$1.86

[1] Q2 2010 data not available.

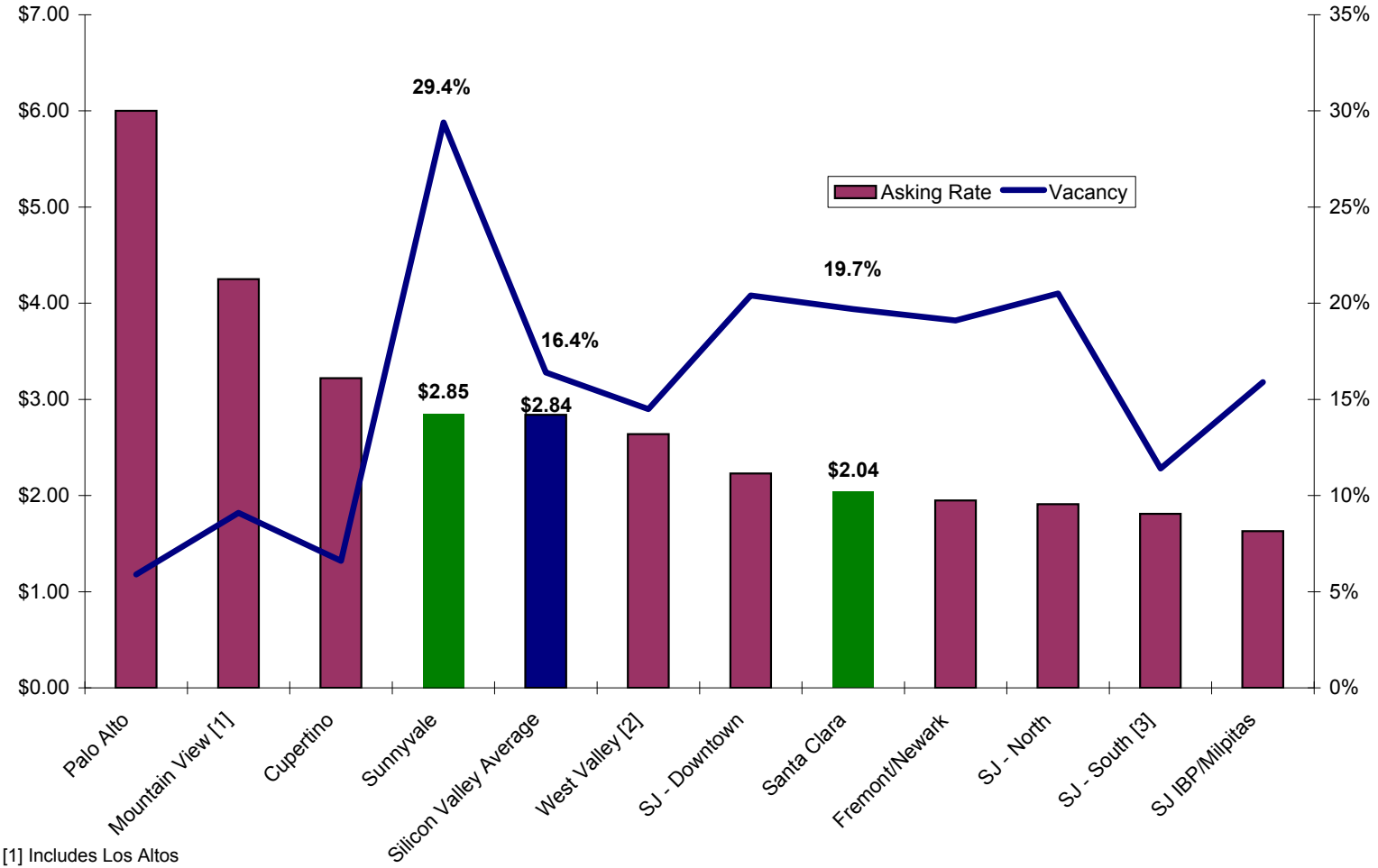
Sources: CB Richard Ellis; Economic & Planning Systems, Inc.

Table 19
R&D Market Indicators
Lawrence Station Area Plan; EPS #20088

	2007	2008				2009				2010				2011
Item	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1
Sunnyvale														
Net Rentable Area	23,824,673	23,975,530	23,628,079	23,527,067	23,357,683	23,412,506	22,696,907	22,688,366	22,766,463	22,762,420	22,870,389	22,629,188	22,562,644	22,591,702
Net Absorption	88,329	194,202	-194,612	80,683	-71,741	-65,973	-410,005	-277,432	-190,109	-21,235	140,597	-60,681	141,672	124,226
Vacancy Rate	12.5%	11.6%	11.1%	10.8%	11.4%	12.0%	14.1%	15.3%	16.3%	16.2%	14.9%	14.8%	13.7%	13.2%
Avg. Asking Rate	$1.50	$1.65	$1.65	$1.65	$1.59	$1.42	$1.42	$1.39	$1.32	$1.32	$1.26	$1.26	$1.26	$1.44
Santa Clara														
Net Rentable Area	21,900,401	21,981,448	21,818,068	21,818,068	21,328,989	21,414,001	21,415,312	21,055,934	21,043,691	21,101,404	21,042,084	20,707,772	20,750,507	20,691,875
Net Absorption	-328,491	251,883	-34,590	-109,070	47,817	-697,678	185,368	-199,780	-55,369	-188,444	49,197	-86,781	91,445	-65,053
Vacancy Rate	12.9%	11.9%	12.1%	12.5%	12.1%	16.1%	15.3%	15.9%	16.5%	17.7%	17.2%	19.0%	18.4%	18.6%
Avg. Asking Rate	$1.43	$1.55	$1.55	$1.55	$1.50	$1.39	$1.39	$1.16	$1.16	$1.16	$1.16	$1.16	$1.15	$1.23
Combined														
Net Rentable Area	45,725,074	45,956,978	45,446,147	45,345,135	44,686,672	44,826,507	44,112,219	43,744,300	43,810,154	43,863,824	43,912,473	43,336,960	43,313,151	43,283,577
Net Absorption	-240,162	446,085	-229,202	-28,387	-23,924	-763,651	-224,637	-477,212	-245,478	-209,679	189,794	-147,462	233,117	59,173
Vacancy Rate	12.7%	11.7%	11.6%	11.6%	11.7%	14.0%	14.7%	15.6%	16.4%	16.9%	16.0%	16.8%	16.0%	15.8%
Avg. Asking Rate	$1.47	$1.60	$1.60	$1.60	$1.55	$1.41	$1.41	$1.28	$1.24	$1.24	$1.21	$1.21	$1.21	$1.34

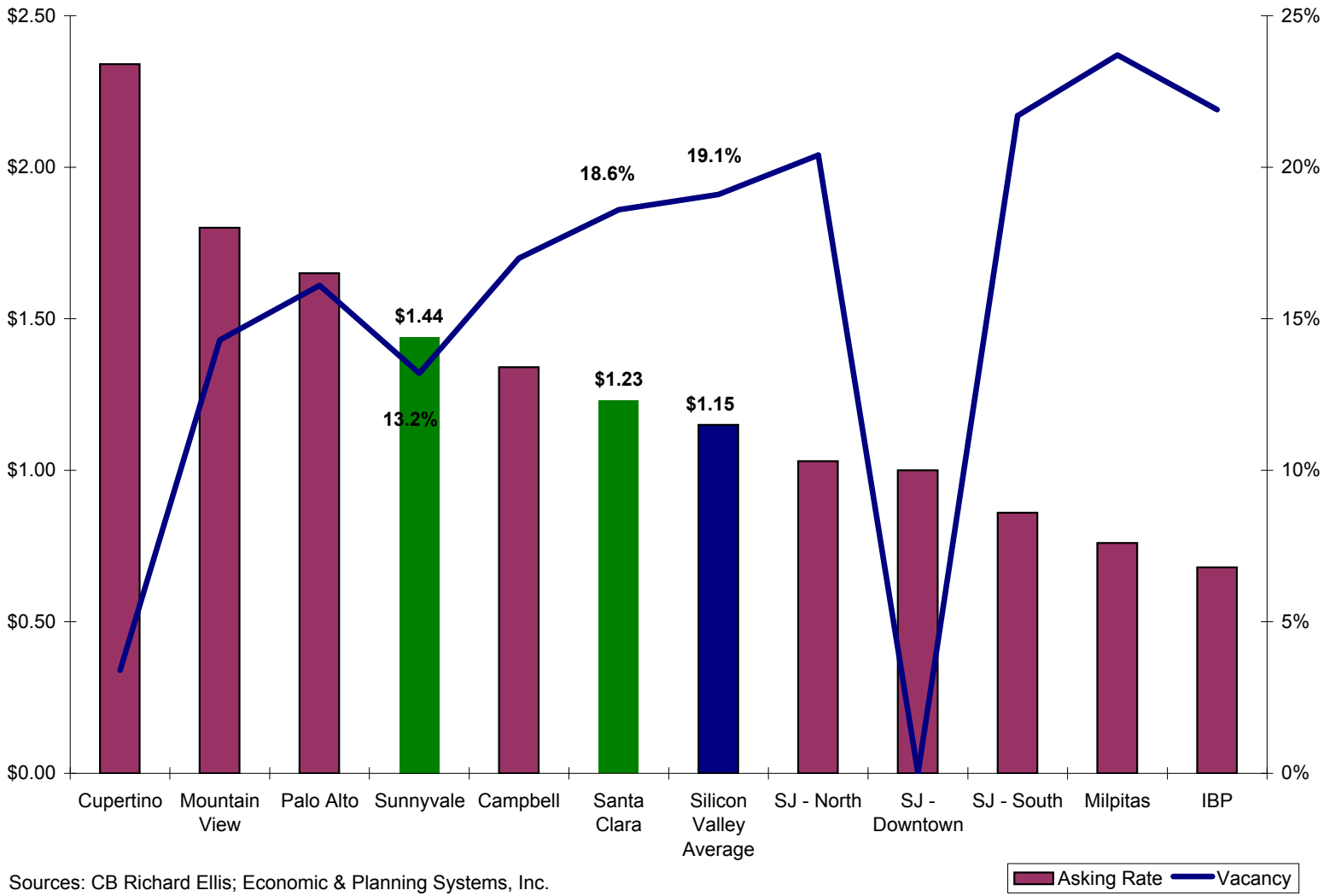
Sources: CB Richard Ellis; Economic & Planning Systems, Inc.

Figure 3: Q4 2011, Office Vacancy and Class A Asking Rates



[1] Includes Los Altos
[2] Includes Los Gatos, Campbell, Saratoga, and Winchester.
[3] Includes Meridian, San Jose East, and San Jose South.
Sources: CB Richard Ellis; Economic & Planning Systems, Inc.

Figure 4: Q4 2011, R&D Vacancy and Asking Rates



Sources: CB Richard Ellis; Economic & Planning Systems, Inc.

Table 20
R&D Listings in the Study Area
Lawrence Station Area Plan; EPS #20088

Address	Type	Space Available	Lease Type	Monthly Rental Rate
1154-1156 Sonora Court	R&D	13,350	NNN	$1.10
3329 Kifer Road	R&D	6,335	NNN	$0.95
895 Kifer Road	Office/R&D	43,000	NNN	$0.82
Weighted Average				**$0.89**

Sources: Loopnet April 2011; Economic & Planning Systems, Inc.

Table 21
Average Annual Office Absorption
Lawrence Station Area Plan; EPS #20088

Item	2005 [1]	2011 [2]	Average Annual Absorption (2005-2011)
Sunnyvale			
Net Rentable Area (sq.ft.)	3,068,641	5,787,955	
Vacancy Rate	18.2%	29.4%	
Occupied Space (sq.ft.)	2,510,148	4,086,296	300,219
Vacant Space (sq.ft.)	558,493	1,701,659	
Santa Clara			
Net Rentable Area (sq.ft.)	7,976,187	8,480,687	
Vacancy Rate	14.6%	19.7%	
Occupied Space (sq.ft.)	6,811,664	6,809,992	-318
Vacant Space (sq.ft.)	1,164,523	1,670,695	

[1] As of 4Q2005.
[2] As of 1Q2011.

Sources: CB Richard Ellis; Economic & Planning Systems, Inc.

Table 22
Average Annual R&D Absorption
Lawrence Station Area Plan; EPS #20088

Item	2005 [1]	2011 [2]	Average Annual Absorption (2005-2011)
Sunnyvale			
Net Rentable Area (sq.ft.)	23,854,151	22,591,702	
Vacancy Rate	17.1%	13.2%	
Occupied Space (sq.ft.)	19,775,091	19,609,597	-31,523
Vacant Space (sq.ft.)	4,079,060	2,982,105	
Santa Clara			
Net Rentable Area (sq.ft.)	22,547,154	20,691,875	
Vacancy Rate	22.1%	18.6%	
Occupied Space (sq.ft.)	17,564,233	16,843,186	-137,342
Vacant Space (sq.ft.)	4,982,921	3,848,689	

[1] As of 4Q2005.
[2] As of 1Q2011.

Sources: CB Richard Ellis; Economic & Planning Systems, Inc.

Table 23
Sonora Court Tenants
Lawrence Station Area Plan; EPS #20088

Company	Address	Industry
Elpida	1175 Sonora Court	Computer memory manufacturer
Tech-Star Industries	1171 Sonora Court	
Plug and Play	1159 Sonora Court	Tech Incubator
Wave Systems Corporation	1159 Sonora Court	Computer chip manufacturer
PHARMout Laboratories	1151 Sonora Court	Bioanalytical Lab
Skillnet	1151 Sonora Court	Customer engagement consulting and technology services
Applied Quantum Technology	1145 Sonora Court	Semiconductor manufacturer
Photo USA	1133 Sonora Court	Manufacturer of photo dye; photo gifts
Vacant	1135 Sonora Court	
A-1 Machine MFG, Inc	1127 Sonora Court	High-tech precision component manufacturing
William G Barnes & Son Co Inc	1146 Sonora Court	General Contractor
Scintera	1154 Sonora Court	Semiconductor manufacturer for wireless technology
Canesta	1156 Sonora Court	3D Vision Semiconductors
R.S. Hughes	1162 Sonora Court	Industrial Product Distributor
Clean Cell International	1170 Sonora Court	Renewable energy manufacturer
Hayes Manufacturing Services, Inc	1178 Sonora Court	Machining and fabrication

Source: Economic & Planning Systems, Inc.

Table 24
2010 Employment by Industry, Sunnyvale and Santa Clara (Combined)
Lawrence Station Area Plan; EPS #20088

Industry	2010 Employees	2035 Employees	2010-2035 % Growth
Agriculture and Natural Resources Jobs	290	260	-10.3%
Manufacturing, Wholesale and Transportation Jobs	80,390	102,290	27.2%
Retail Jobs	13,300	20,780	56.2%
Financial and Professional Service Jobs	33,800	52,480	55.3%
Health, Educational and Recreational Service Jobs	36,580	56,310	53.9%
Other Jobs	20,400	32,020	57.0%
Total	**184,760**	**264,140**	**43.0%**

Sources: ABAG Projections 2009; Economic & Planning Systems, Inc.

B | PRO FORMA ANALYSES

Table A-1
Townhome Density Residential Residual Land Value (For-Sale)
Lawrence Station Area Plan; EPS #20088

Item	Assumption		Per Unit	Per Acre	
DEVELOPMENT PROGRAM					
Land Area (acres)				1.0	acre
Units [1]	25	du/acre		25.0	
Gross Area	1,200	sq.ft. per unit		30,000	sq.ft.
Efficiency Ratio	100%				
Net Area	1,200	sq.ft. per unit		30,000	sq.ft.
Parking Spaces	1.25	spaces per unit		31	
REVENUE ASSUMPTIONS					
Base Price [2]	$500,000	/unit	$500,000	$12,500,000	
(less) Cost of Sale	3.0%		($15,000)	($375,000)	
Total Revenues			**$485,000**	**$12,125,000**	
DEVELOPMENT COSTS					
Direct Costs					
Building Construction Cost [3]	$225.00	/sq. ft.	$270,000	$6,750,000	
Parking Cost	$0	/space	$0	$0	
Total Direct Costs			$270,000	$6,750,000	
Indirect Costs	25.0%	of direct costs	$67,500	$1,687,500	
Subtotal, Direct and Indirect Costs			**$337,500**	**$8,437,500**	
Contingency (% of direct and indirect costs, excludes parking)	10.0%		$33,750	$843,750	
Profit Margin (% of sales revenue)	10.0%		$48,500	$1,212,500	
Total Costs			**$419,750**	**$10,493,750**	
RESIDUAL LAND VALUE (rounded)			**$65,200**	**$1,631,000**	

[1] Density of 25 units per acre is assumed based on typical townhome development patterns.
[2] Sales price based on comparable transactions in the Study Area and the cities of Sunnyvale and Santa Clara and reflect current market conditions.
[3] Based on SF Bay Area data from Marshall Swift and modified based on interviews with area developers.

Sources: Marshall Swift; Trulia.com; Economic & Planning Systems, Inc.

Table A-2
Medium Density Residential Residual Land Value (For-Sale)
Lawrence Station Area Plan; EPS #20088

Item	Assumption		Per Unit	Per Acre	
DEVELOPMENT PROGRAM					
Land Area (acres)				1.0	acre
Units [1]	35	du/acre		35.0	
Gross Area	1,136	sq.ft. per unit		39,773	sq.ft.
Efficiency Ratio	88%				
Net Area	1,000	sq.ft. per unit		35,000	sq.ft.
Parking Spaces	1.25	spaces per unit		44	
REVENUE ASSUMPTIONS					
Base Price [2]	$425,000	/unit	$425,000	$14,875,000	
(less) Cost of Sale	3.0%		($12,750)	($446,250)	
Total Revenues			**$412,250**	**$14,428,750**	
DEVELOPMENT COSTS					
Direct Costs					
Building Construction Cost [3]	$225.00	/sq. ft.	$255,682	$8,948,864	
Parking Cost [4]	$4,000	/space	$5,029	$176,000	
Total Direct Costs			$260,710	$9,124,864	
Indirect Costs	25.0%	of direct costs	$65,178	$2,237,216	
Subtotal, Direct and Indirect Costs			**$325,888**	**$11,362,080**	
Contingency (% of direct and indirect costs, excludes parking)	10.0%		$31,960	$1,118,608	
Profit Margin (% of sales revenue)	10.0%		$41,225	$1,442,875	
Total Costs			**$399,073**	**$13,923,563**	
RESIDUAL LAND VALUE (rounded)			**$14,400**	**$505,000**	

[1] Density of 35 units per acre is assumed to be consistent with the Medium Density Residential designation.
[2] Sales price based on comparable transactions in the Study Area and the cities of Sunnyvale and Santa Clara and reflect current market conditions.
[3] Based on SF Bay Area data from Marshall Swift and modified based on interviews with area developers.
[4] Parking costs shown reflect surface parking with all-in cost estimates of $4,000 per space.

Sources: Marshall Swift; Trulia.com; Economic & Planning Systems, Inc.

Table A-3
High Density Residential Residual Land Value (For-Sale)
Lawrence Station Area Plan; EPS #20088

Item	Assumption	Per Unit	Per Acre
DEVELOPMENT PROGRAM			
Land Area (acres)			1.0 acre
Units [1]	55 du/acre		55.0
Gross Area	1,136 sq.ft. per unit		62,500 sq.ft.
Efficiency Ratio	88%		
Net Area	1,000 sq.ft. per unit		55,000 sq.ft.
Parking Spaces	1.25 spaces per unit		69
REVENUE ASSUMPTIONS			
Base Price [2]	$450,000 /unit	$450,000	$24,750,000
(less) Cost of Sale	3.0%	($13,500)	($742,500)
Total Revenues		**$436,500**	**$24,007,500**
DEVELOPMENT COSTS			
Direct Costs			
Building Construction Cost [3]	$225.00 /sq. ft.	$255,682	$14,062,500
Parking Cost [4]	$20,000 /space	$25,091	$1,380,000
Total Direct Costs		$280,773	$15,442,500
Indirect Costs	25.0% of direct costs	$70,193	$3,515,625
Subtotal, Direct and Indirect Costs		**$350,966**	**$18,958,125**
Contingency (% of direct and indirect costs, excludes parking)	10.0%	$31,960	$1,757,813
Profit Margin (% of sales revenue)	10.0%	$43,650	$2,400,750
Total Costs		**$426,576**	**$23,116,688**
RESIDUAL LAND VALUE (rounded)		**$16,200**	**$891,000**

[1] Density of 55 units per acre is assumed to be consistent with the High Density Residential designation.
[2] Sales price based on comparable transactions in the Study Area and the cities of Sunnyvale and Santa Clara and reflect current market conditions.
[3] Based on SF Bay Area data from Marshall Swift and modified based on interviews with area developers.
[4] Parking costs shown reflect podium parking with all-in cost estimates of $20,000 per space.

Sources: Marshall Swift; Trulia.com; Economic & Planning Systems, Inc.

Table A-4
Medium Density Residential Residual Land Value (Rental)
Lawrence Station Area Plan; EPS #20088

Item	Assumption		Per Unit	Per Acre	
DEVELOPMENT PROGRAM					
Land Area (acres)				1.0	acre
Units [1]	35	du/acre		35.0	
Gross Area	1,136	sq.ft. per unit		39,773	sq.ft.
Efficiency Ratio	88%				
Net Area	1,000	sq.ft. per unit		35,000	sq.ft.
Parking Spaces	1.25	spaces per unit		44	
REVENUE ASSUMPTIONS					
Gross Revenue [2]	$2.15	/net sq.ft./month	$25,800	$903,000	
Other Operating Revenue (beyond leases)	5.0%		$1,290	$45,150	
(less) Vacancy Rate	3.0%		($774)	($27,090)	
(less) Operating Expenses	$7,000	per unit	($7,000)	($245,000)	
(less) Replacement Reserve	3.0%		($774)	($27,090)	
Subtotal, Annual Net Operating Income			$18,542	$648,970	
Capitalized Value	5.5%	cap rate	$327,013	$11,445,471	
Total Revenues			**$327,013**	**$11,445,471**	
DEVELOPMENT COSTS					
Direct Costs					
Building Construction Cost [3]	$202.50	/sq. ft.	$230,114	$8,053,977	
Parking Cost [4]	$4,000	/space	$5,000	$175,000	
Total Direct Costs			$235,114	$8,228,977	
Indirect Costs	25.0%	of direct costs	$58,778	$2,013,494	
Subtotal, Direct and Indirect Costs			**$292,642**	**$10,242,472**	
Contingency (% of direct and indirect costs, excludes parking)	10.0%		$28,764	$1,006,747	
Total Costs			**$321,406**	**$11,249,219**	
RESIDUAL LAND VALUE (rounded)			**$5,600**	**$196,000**	

[1] Density of 35 units per acre is assumed to be consistent with the Medium Density Residential designation.
[2] Lease rate based on asking rents in the Study Area and the cities of Sunnyvale and Santa Clara and reflect current market conditions.
[3] Based on SF Bay Area data from Marshall Swift and modified based on interviews with area developers.
[4] Parking costs shown reflect surface parking with all-in cost estimates of $4,000 per space.

Sources: Marshall Swift; Trulia.com; Economic & Planning Systems, Inc.

Table A-5
High Density Residential Residual Land Value (Rental)
Lawrence Station Area Plan; EPS #20088

Item	Assumption	Per Unit	Per Acre
DEVELOPMENT PROGRAM			
Land Area (acres)			1.0 acre
Units [1]	55 du/acre		55.0
Gross Area	1,136 sq.ft. per unit		62,500 sq.ft.
Efficiency Ratio	88%		
Net Area	1,000 sq.ft. per unit		55,000 sq.ft.
Parking Spaces	1.25 spaces per unit		69
REVENUE ASSUMPTIONS			
Gross Revenue [2]	$2.25 /net sq.ft./month	$27,000	$1,485,000
Other Operating Revenue (beyond leases)	5.0%	$1,350	$74,250
(less) Vacancy Rate	3.0%	($810)	($44,550)
(less) Operating Expenses	$7,000 per unit	($7,000)	($385,000)
(less) Replacement Reserve	3.0%	($810)	($44,550)
Subtotal, Annual Net Operating Income		$19,730	$1,085,150
Capitalized Value	5.5% cap rate	$347,965	$19,138,100
Total Revenues		**$347,965**	**$19,138,100**
DEVELOPMENT COSTS			
Direct Costs			
Building Construction Cost [3]	$202.50 /sq. ft.	$230,114	$12,656,250
Parking Cost [4]	$20,000 /space	$25,000	$1,375,000
Total Direct Costs		$255,114	$14,031,250
Indirect Costs	25.0% of direct costs	$63,778	$3,164,063
Subtotal, Direct and Indirect Costs		**$312,642**	**$17,195,313**
Contingency (% of direct and indirect costs, excludes parking)	10.0%	$28,764	$1,582,031
Total Costs		**$341,406**	**$18,777,344**
RESIDUAL LAND VALUE (rounded)		**$6,600**	**$361,000**

[1] Density of 55 units per acre is assumed to be consistent with the High Density Residential designation.
[2] Lease rate based on asking rents in the Study Area and the cities of Sunnyvale and Santa Clara and reflect current market conditions.
[3] Based on SF Bay Area data from Marshall Swift and modified based on interviews with area developers.
[4] Parking costs shown reflect podium parking with all-in cost estimates of $20,000 per space.

Sources: Marshall Swift; Trulia.com; Economic & Planning Systems, Inc.

Table A-6
Low Intensity Office/ High-Value R&D Residual Land Value
Lawrence Station Area Plan; EPS #20088

Item	Assumption		Per Sq.Ft.	Per Acre	
DEVELOPMENT PROGRAM					
Land Area (acres)				1.0	acre
Gross Area	1.00	F.A.R.		43,560	sq.ft.
Efficiency Ratio	92%				
Net Area				40,075	sq.ft.
Parking Spaces	400	net sq.ft. of bldg. per space		100	spaces
REVENUE ASSUMPTIONS					
Gross Revenue (Full-Service) [1]	$3.14	/net sq.ft./month	$34.61	$1,507,629	
Other Operating Revenue (beyond leases)	5.0%		$1.73	$75,381	
(less) Vacancy Rate	3.0%		($1.04)	($45,229)	
(less) Operating Expenses	30.0%		($10.38)	($452,289)	
(less) Replacement Reserve	3.0%		($1.04)	($45,229)	
(less) Marketing and Commission Expenses	6.0%		($2.08)	($90,458)	
Subtotal, Annual Net Operating Income			$21.80	$949,806	
Capitalized Value	7.0%	cap rate	$302.15	$13,161,601	
Total Revenues			**$302.15**	**$13,161,601**	
DEVELOPMENT COSTS					
Direct Costs					
Building Construction Cost [2]	$175	/sq. ft.	$175.00	$7,623,000	
Parking Cost [3]	$20,000	/space	$46.00	$2,003,760	
Total Direct Costs			$221.00	$9,626,760	
Indirect Costs					
Indirect Costs	25.0%	of direct costs	$55.25	$2,406,690	
Tenant Improvement Allowance	$30	/net sq. ft.	$27.60	$1,202,256	
Total Indirect Costs			$82.85	$3,608,946	
Subtotal, Direct and Indirect Costs			**$303.85**	**$13,235,706**	
Contingency (% of direct and indirect costs)	10.0%		$1,323,571	$1,323,571	
Profit Margin (% of capitalized value)	0.0%		$0.00	$0	
Total Costs			**$334.24**	**$14,559,277**	
RESIDUAL LAND VALUE (rounded)			**($32.00)**	**($1,398,000)**	

[1] The lease rate is based on current asking rents in the Sunnyvale/Santa Clara area but have been adjusted upwards by 10% to reflect new construction. Office lease rates reflect full-service leases.
[2] Based on SF Bay Area data from Marshall Swift and modified based on interviews with area developers.
[3] Parking costs shown reflect podium parking with all-in cost estimates of $20,000 per space.

Sources: Marshall Swift; CB Richard Ellis, First Quarter 2011, Silicon Valley Office Report; Economic & Planning Systems, Inc.

Table A-7
Medium Intensity Office/ High-Value R&D Residual Land Value
Lawrence Station Area Plan; EPS #20088

Item	Assumption		Per Sq.Ft.	Per Acre	
DEVELOPMENT PROGRAM					
Land Area (acres)				1.0	acre
Gross Area	2.00	F.A.R.		87,120	sq.ft.
Efficiency Ratio	92%				
Net Area				80,150	sq.ft.
Parking Spaces	400	net sq.ft. of bldg. per space		200	spaces
REVENUE ASSUMPTIONS					
Gross Revenue (Full-Service) [1]	$3.29	/net sq.ft./month	$36.34	$3,166,021	
Other Operating Revenue (beyond leases)	5.0%		$1.82	$158,301	
(less) Vacancy Rate	3.0%		($1.09)	($94,981)	
(less) Operating Expenses	30.0%		($10.90)	($949,806)	
(less) Replacement Reserve	3.0%		($1.09)	($94,981)	
(less) Marketing and Commission Expenses	6.0%		($2.18)	($189,961)	
Subtotal, Annual Net Operating Income			$22.89	$1,994,593	
Capitalized Value	7.0%	cap rate	$317.26	$27,639,363	
Total Revenues			**$317.26**	**$27,639,363**	
DEVELOPMENT COSTS					
Direct Costs					
Building Construction Cost [2]	$180	/sq. ft.	$180.00	$15,681,600	
Parking Cost [3]	$20,000	/space	$46.00	$4,007,520	
Total Direct Costs			$226.00	$19,689,120	
Indirect Costs					
Indirect Costs	25.0%	of direct costs	$56.50	$4,922,280	
Tenant Improvement Allowance	$30	/net sq. ft.	$27.60	$2,404,512	
Total Indirect Costs			$84.10	$7,326,792	
Subtotal, Direct and Indirect Costs			**$310.10**	**$27,015,912**	
Contingency (% of direct and indirect costs)	10.0%		$2,701,591	$2,701,591	
Profit Margin (% of capitalized value)	0.0%		$0.00	$0	
Total Costs			**$341.11**	**$29,717,503**	
RESIDUAL LAND VALUE (rounded)			**($24.00)**	**($2,078,000)**	

[1] The lease rate is based on current asking rents in the Sunnyvale/Santa Clara area but have been adjusted upwards by 15% to reflect new construction and higher amenities associated with higher density development. Office lease rates reflect full-service leases.
[2] Based on SF Bay Area data from Marshall Swift and modified based on interviews with area developers.
[3] Parking costs shown reflect podium parking with all-in cost estimates of $20,000 per space.

Sources: Marshall Swift; CB Richard Ellis, First Quarter 2011, Silicon Valley Office Report; Economic & Planning Systems, Inc.

C | PARKING ANALYSIS

Observations

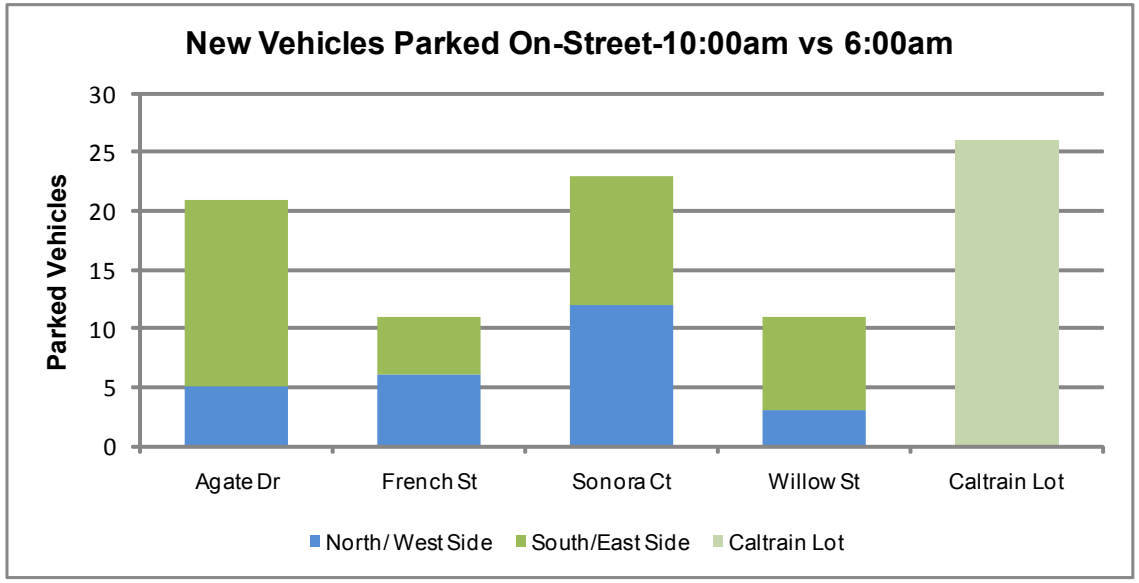
Fehr & Peers conducted surveys during a midweek morning to examine park-and-ride commuters and the parking turnover surrounding the Lawrence Caltrain Station. Surveys involved recording vehicles parked at 6:00am and 10:00am within the Station Area on Sonora Court, Agate Drive, Willow Avenue, and French Street. New vehicles that parked within the neighborhoods at 10:00am that were not occupying spaces at 6:00am are assumed to be park-and-ride commuters. Of the 92 park-and-ride users illustrated in the Figure C.1 below, just 26 vehicles, or 28 percent, parked within the designated Caltrain commuter parking lot. Sonora Court alone, just north of the Caltrain tracks, accounts for 25 percent of the park-and-ride vehicles. These results illustrate the midweek utilization of the available on-street and off-street parking for the Station.

Parking Research and Analysis

Residential Parking Demand Rates

According to the Institute for Transportation Engineers (ITE) Parking Generation rates, 4th Edition, peak parking demand for a low/mid-rise apartment is 1.23 vehicles per unit for suburban developments and 1.2 for urban areas. However, these rates do not explicitly account for the level of transit service nearby. As a result, they may overestimate actual parking demand if applied directly to a transit oriented development area.

Figure D.1: Parked vehicles near station



In comparison, a recent study by Cervero, et al (2010) indicates that peak demand at multi-family residential properties near suburban rail stations to be 1.15 per unit. Cervero's study found that the average parking supply for the projects studies was 1.57 spaces per unit. The SANDAG Parking for Smart Growth (2010) study, based on a review of current best practices rather than a collection of empirical data, averaged ITE 3rd Edition multi-family rates; comparing the 1.0 suburban and 1.20 urban ITE rates with Cervero's finding at 1.15, SANDAG generated their demand rate at 1.12. SANDAG then adds a 10 percent buffer to this value in order to allow drivers to find the last few spaces without excessive idling and to accommodate for parking supply. After adding the 10 percent buffer, the final SANDAG recommendation for multi-family residential units is 1.25 parking spaces per dwelling unit. While conventional ITE parking standards can be conservative, Cervero's study indicates that inflated parking rates is often a result of fears by both developers and municipalities in providing insufficient parking or creating spillover on-street parking problems.

Other research efforts include residential parking demand rates from the joint SJSU/VTA Collaborative Research Project on parking utilization near TODs (2010), and the MTC Smart Growth Toolbox (2007). The SJSU/VTA study found an average parking utilization rate of 1.3 spaces per unit and an average parking supply rate of 1.7 spaces per unit for residential TODs near rail transit stations in Santa Clara County; the supply rate was also higher than the ITE 4th Edition standard.

SUGGESTED PARKING DEMAND RATES

Land Use	Cervero	SANDAG	SJSU/VTA	MTC
Multifamily Residential (per unit)	1.15	1.25	1.3	1.25 - 2.5
Office (per ksf)	-	2.9	-	2.25 - 3.3
Retail (per ksf)	-	3.6	-	2.5 - 4.0

Source: Cervero et al *Are Suburban TODs Overparked?* (2010); SANDAG's *Parking Strategies for Smart Growth* (2010); SJSU/VTA *Collaborative Research Project* (2010); *MTC's Parking Polices to Support Smart Growth* (2007)

MTC's Smart Growth Toolbox indicates that representative parking requirements for transit neighborhoods (residential districts around transit stations) can range from 1.25 to 2.25 spaces per residential unit. While the MTC research is not based on survey data, it is a primary source for policy guidance. The Suggested Parking Demand Rates Table identifies the suggested parking rates from the four major literature sources identified above.

In general, a review of recent research studies and policy guidance suggest that residential parking demand is lower around rail stations. Therefore, simply using standard parking rates around the Lawrence Station Area may result in an oversupply of residential parking.

Office Parking Demand Rates

According to ITE's Parking Generation, 4th Edition, the average peak period parking demand for commercial office developments is 2.84 per ksf in suburbs and 2.47 per ksf in urban areas. The SANDAG study, which incorporates observed rates at Pleasant Hill BART station and Dadeland South TOD in Florida, adds the 10 percent buffer to the ITE 3rd Edition rates to estimate an office parking demand rate at 2.9 per ksf. The MTC Smart Growth Toolbox indicates parking requirements for office uses range from 2.25 to 3.33 spaces per unit for transit neighborhoods (residential districts around transit stations). Observations we conducted at the Sunnyvale City Center are consistent with these recommended ranges.

Retail Parking Demand Rates

Retail demand will vary greatly depending on the type of retail use and time of year (December can result in parking demand up to 50 percent higher than a typical month). The SANDAG study recommends utilizing retail parking rates presented in ULI's Shared Parking (2nd Edition) at 3.6 per ksf. While SANDAG evaluated at ITE's retail rates as well, it primarily utilized the ULI methodology since the scale of the ITE categories were larger than the character of community shopping centers studied in San Diego.

The MTC Smart Growth Toolbox provides an example of maximum retail parking rates in Portland at 0.7 per ksf maximum in the central downtown core and 2.5 per ksf in adjacent business districts. Additionally, for a planned transit neighborhood like Lawrence Station (residential district organized around transit station), MTC provides representative parking requirements for retail rates to range from 2.5 to 4.0 spaces per unit. As noted above, this serves primarily as policy guidance. Sunnyvale's current standards for retail development, 4.4 to 5.5 per ksf depending on the shopping center size, require a range higher than would likely be necessary in the Lawrence Station area.

D | REFERENCES

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