



**City of
Santa Clara**
The Center of What's Possible

EI CAMINO REAL SPECIFIC PLAN: AREA PROFILE



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1

INTRODUCTION

Overview

This chapter provides background and context for the upcoming El Camino Real Specific Plan project. It identifies the project partners and provides an overview of the plan study area. It also includes a snapshot of the history and context of Santa Clara's El Camino Real Plan Area.

Project and Partners

The City of Santa Clara – in collaboration with its partners Santa Clara County, Santa Clara Valley Transportation Authority (VTA), Association of Bay Area Governments (ABAG), Metropolitan Transportation Commission (MTC), and the broader community – is embarking on the creation of a focused specific plan for the El Camino Real corridor in Santa Clara. The Plan will create a vision, policies, development standards, and implementation strategies for the future of the El Camino Real Specific Plan Area (shown in Figure 1.1), with adoption anticipated in 2019. This project is primarily funded by a planning grant from MTC, and contributions from the City of Santa Clara.

Purpose of This Profile

This profile provides an overview of the physical, demographic, and policy context in the El Camino Real Specific Plan Area. The Plan Area was designated as a Priority Development Area (PDA) by ABAG and the City in 2011. The PDA designation signals agreement between the City and ABAG that transit-oriented development, connectivity and walkability, and infrastructure and design upgrades are a priority along El Camino Real.

This profile includes chapters that address demographics, existing policy for the area, existing land use, and urban form. It is accompanied and complimented by additional context memos for the following topics:

- Transportation Profile Memo
- Market Demand Analysis
- Infrastructure Profile Memo

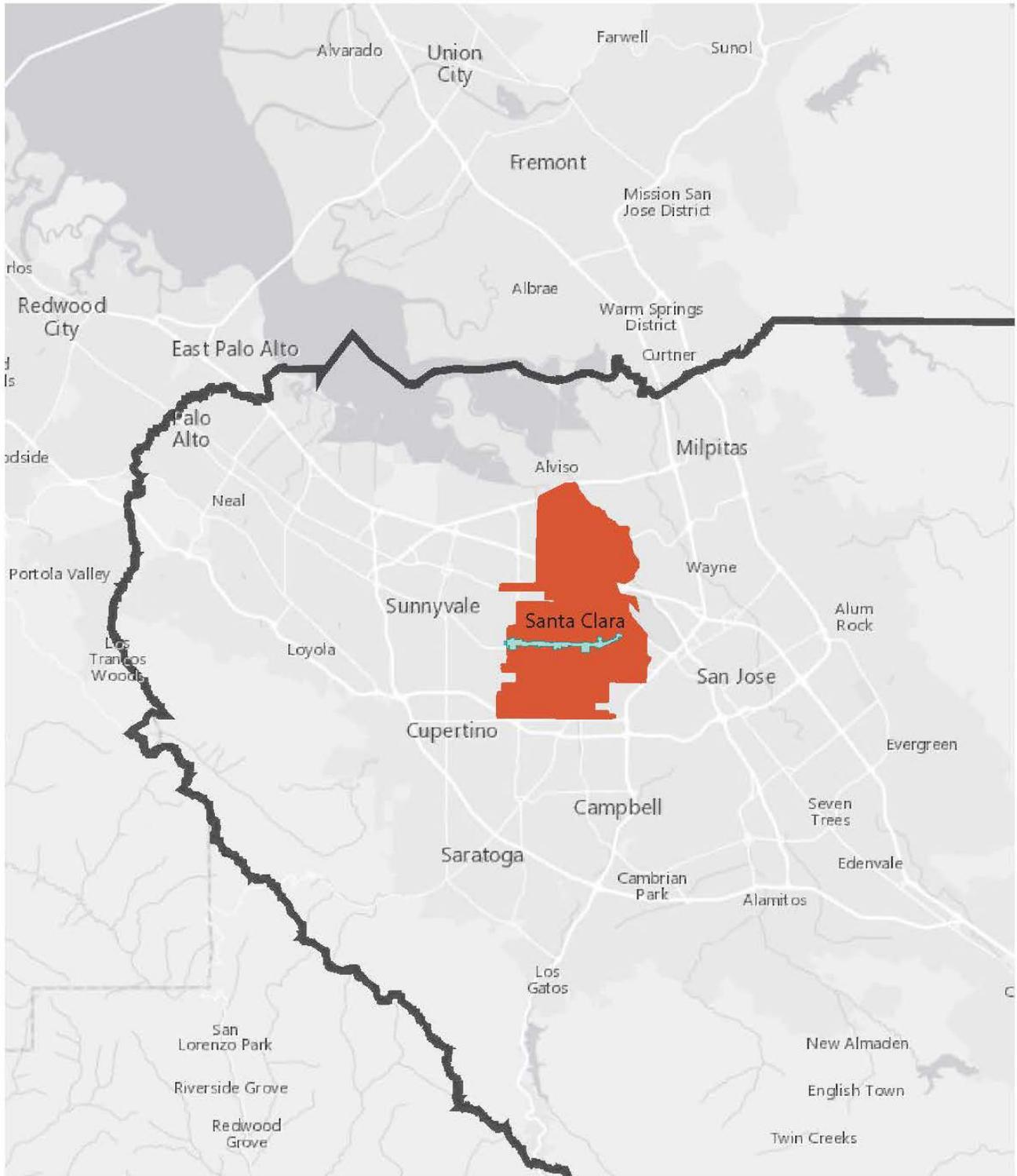
The purpose of this profile is to help the City, community, and consultant team develop feasible “alternatives” or “scenarios” for the future of the area, with a focus on key issues and opportunities that face the El Camino Real corridor. In coordination with a process of community input, elected official review, and further technical analysis and creative work by the project team, these scenario concepts will be the basis of the final plan for El Camino Real.

Study Area

The El Camino Real Specific Plan Area is shown in Figures 1.2 and 1.3. With a few minor exceptions, the Specific Plan Area boundary is consistent with the Potential Priority Development Area (PDA) boundary established by ABAG and the City in 2011 and in the regional Plan Bay Area adopted by ABAG and MTC in 2013. El Camino Real is the primary east-west route and state highway running through the middle of the City of Santa Clara. The Plan Area includes the El Camino Real right-of-way, as well as all parcels fronting the arterial from Helen Ave at the western edge of the City to the Capitol Corridor train tracks to the east. It generally includes the commercial and residential mixed-use developments along El Camino Real between Warburton Avenue and Benton Street, as well as Civic Center. The project area is surrounded in most directions by single-family neighborhoods. Further beyond, the area is near three Interstates or Highways (I-280, I-880, and Hwy-101).

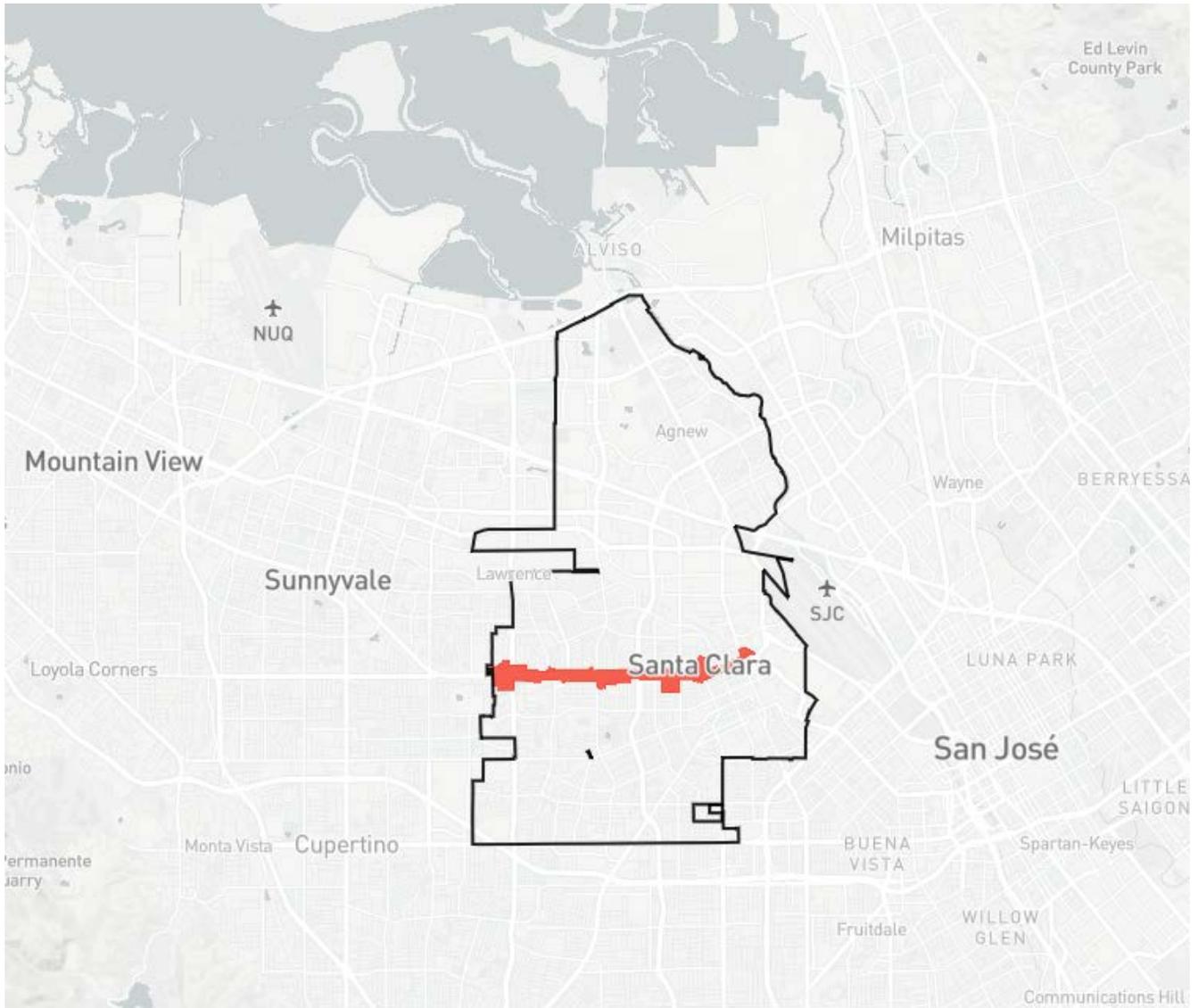
The El Camino Real Plan Area has a total acreage of just over 250 acres, with a majority of its land designated towards retail and commercial uses. The remaining portion contains a mix of uses including multi-family residential, single-family residential, public/institutional, and light industrial.

Figure 1-1 El Camino Real Specific Plan Area Regional Context



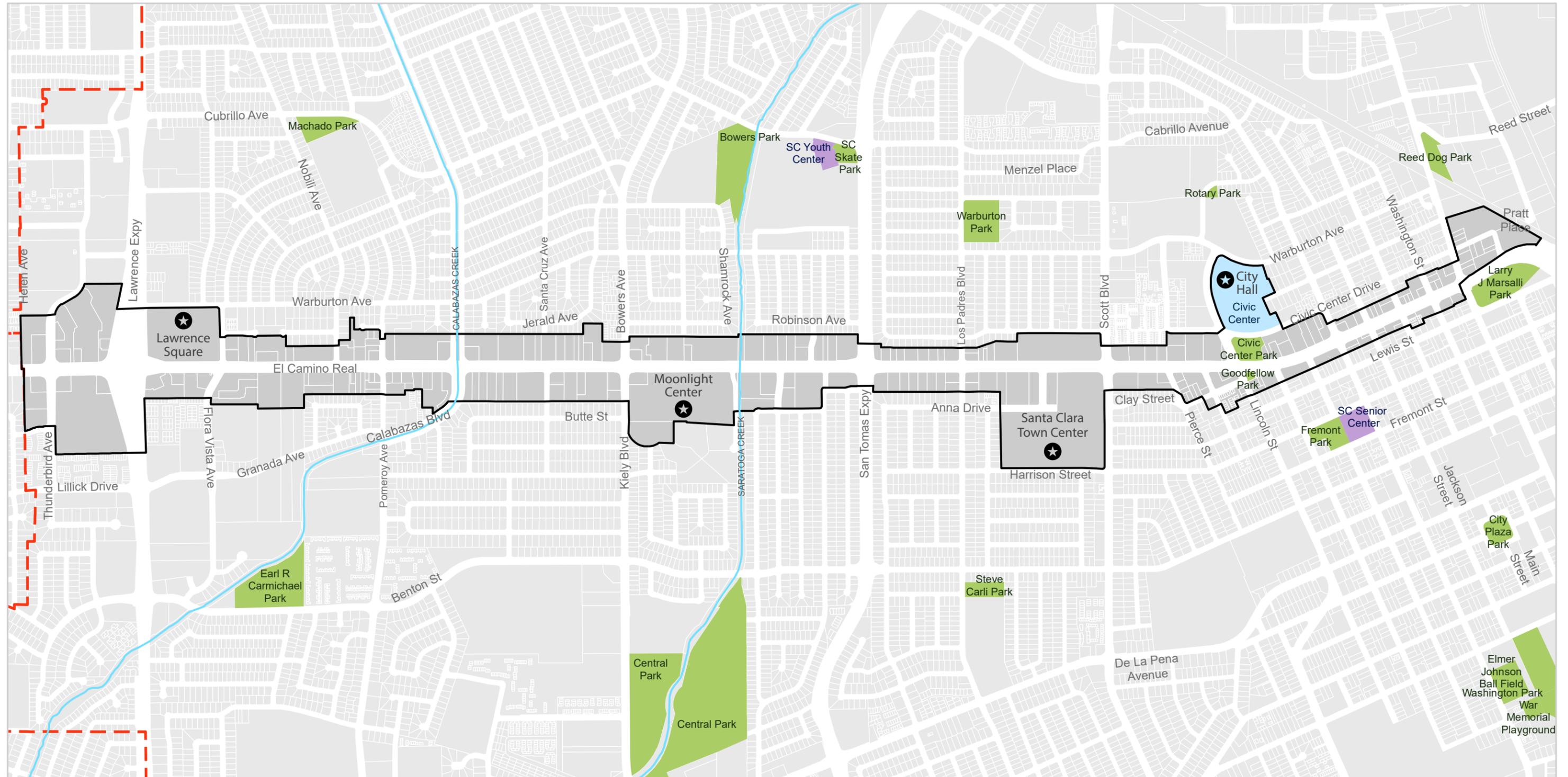
- Santa Clara County Boundary
- Santa Clara City Boundary
- ECR Specific Plan Boundary

Figure 1-2 El Camino Real Specific Plan Area Local Context

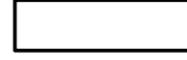


- City Boundary
- ECR Specific Plan Boundary

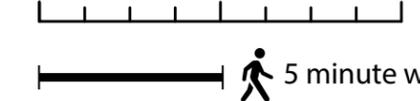
Figure 1-3 El Camino Real Specific Plan Area



Legend

-  City Boundary
-  Plan Parcels
-  Community Centers
-  Parcels
-  Creeks
-  Civic Center
-  Plan Boundary
-  Parks
-  Landmarks

0 0.125 0.25 0.5 Miles



History and Context

At the regional scale, El Camino Real in Santa Clara is the termination of a 43-mile urban corridor that runs all the way to the southern neighborhoods of San Francisco. The street's historic role was as a state highway and served as the main north-south transportation corridor along the San Francisco Peninsula, and – for hundreds of years before that – was a key link along the “Royal Road” that connected California's 21 Franciscan missions. Even after the missions' decline, El Camino Real was a key component in the multi-state road system used by the Butterfield Stage Coach Company for travel from Texas to San Francisco. In the 1850s, El Camino Real's prominence was supplanted by the railroad.

El Camino Real regained some of its importance in the early 20th century when the State decided to create a unified highway system to serve the newest form of transportation: the automobile. El Camino Real was paved from the northern end of San Mateo County down into San Jose which instigated a building boom that spawned many of the roadside motels, restaurants and historic business districts along the corridor. The auto-oriented character that defines El Camino Real today emerged in the 1920s, as the automobile increasingly became the desired mode of transportation.

With the construction of freeways, like the 101 and the 280 in the 1960's and the complete urbanization of the San Francisco Peninsula, El Camino Real evolved into an urban street rather than a regional thoroughfare. While the road continued to be important for people traveling between San Jose and San Francisco, uses along the route focused less on statewide travelers and recreational trips and more on local-serving retail centers with grocery stores, offices, and businesses. However, this crisis of identity – Is it a local street? Is it a regional highway? Is it a transit thoroughfare? – contributes to the corridor's surprising diversity of design and land use from city to city along the Peninsula.

This change in traffic patterns supports changing land uses. In recent years, the entire El Camino Real corridor has received increased planning attention through coordinated regional efforts such as the ***Grand Boulevard Initiative***, a 19-city and 2-county collaboration to transform the whole corridor into a livable street that supports multiple modes of transit and a dynamic mix of uses. There is also a regional effort to introduce Bus Rapid Transit (BRT) along El Camino Real, in a number of potential orientations that would upgrade VTA's existing 522 Rapid Bus Route with dedicated lanes and more substantial, rail-like stations. Within this context, there have been a number of city-led corridor planning projects for El Camino Real along the Peninsula, including in the nearby cities of Sunnyvale (in process), Mountain View (adopted 2014), Menlo Park (adopted 2012), Palo Alto (2007 Master Plan), Redwood City (in process), and Belmont (in process), among others.

2

DEMOGRAPHICS

Overview

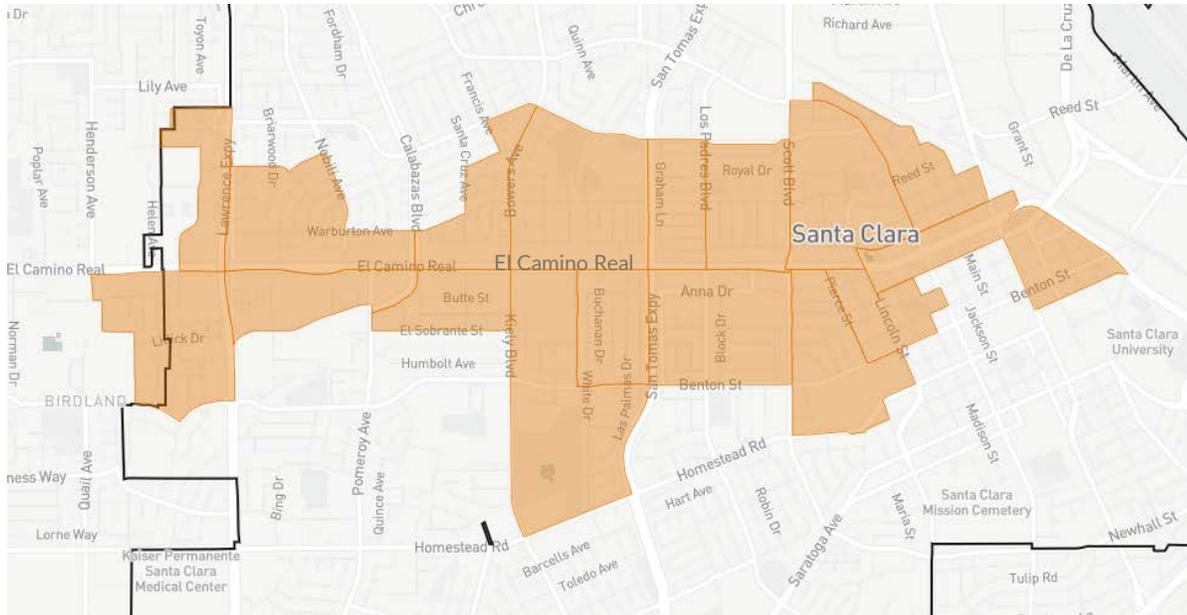
This chapter provides a general overview of the demographic, social, economic, and health conditions for the El Camino Real Specific Plan area. It includes a range of data about the population in and around the corridor, such as age, race and ethnicity, housing status, income, education, linguistic composition, health status, levels of physical activity, and crime. Data is drawn from the U.S. Census, the American Community Survey, the California Health Information Survey, the Santa Clara County Public Health Department, and other sources.

Demographic Boundaries

This chapter organizes information according to the following:

- **Plan Area:** The El Camino Real Specific Plan area (“Plan Area”) is the area that will be covered by the adopted Specific Plan, as described in Chapter 1.
- **Study Area Census Block Groups:** Figure 2-1 shows the El Camino Real Specific Plan Census Block Groups (“ECR Block Groups”) used for all census-based analyses in this profile. These 17 block groups were selected based on those which intersected the Plan Area. Beginning with the 2010 census, the census bureau began compiling annual detailed social, housing and economic data for medium to larger cities to provide more updated data versus every ten years. The five year survey period data is considered the most accurate and reliable sample best used analyzing small populations because of its accuracy. This profile analyzed data from the US Census American Community Survey 5-year estimates for 2011 through 2014.
- **95050 and 95051 Zip Codes:** As shown in Figure 2-2, the 95050 and 95051 zip codes encompass the entire corridor – as well as a roughly mile-wide buffer in the neighborhoods surrounding the corridor. Zip code level data was used for some of the health topics in this profile.
- **Small Area/Neighborhoods:** As shown in Figure 2-3, the small area/neighborhood boundaries encompass the entire corridor – as well as neighborhoods to the north, south, east and west. These small area/neighborhood boundaries were developed by the Santa Clara County Department of Public Health to study health conditions for smaller populations within the City, while being as consistent as possible with pre-existing neighborhoods.
- **Surrounding Communities:** Data is sometimes compared to the City of Santa Clara, as well as the State overall.

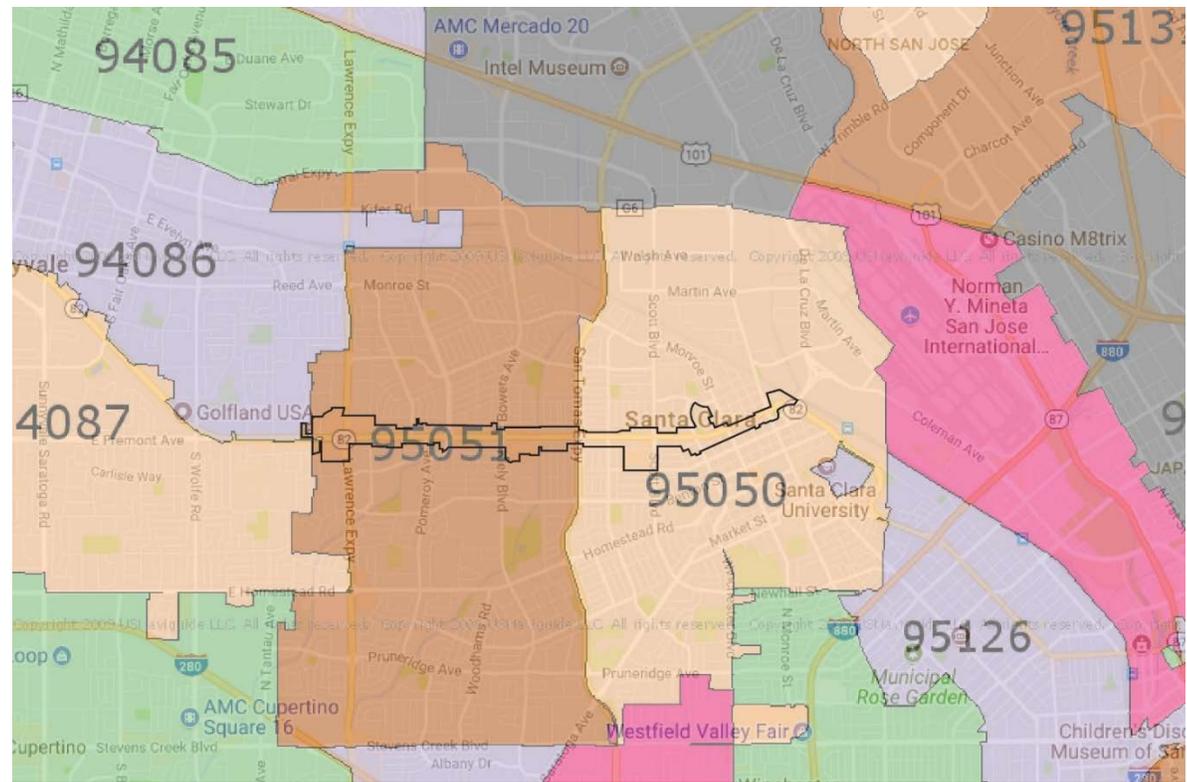
Figure 2-1 Study Area Census Block Groups



- City Boundary
- Census Block Groups

Source: 2009-2014 ACS, Urban Footprint, Raimi + Associates, 2018

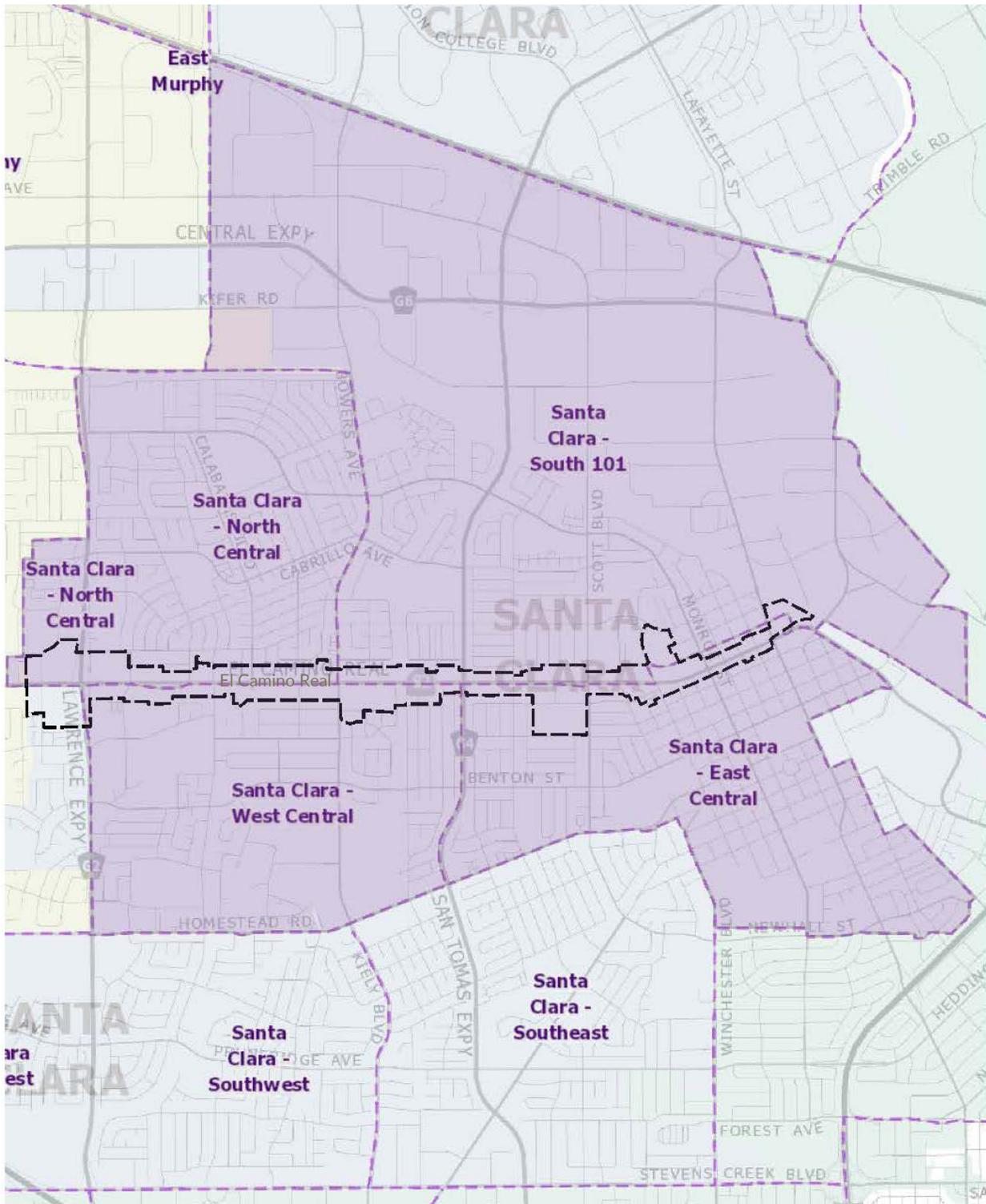
Figure 2-2 Study Area and Surrounding Zip Codes



- ECR Plan Area Boundary

Source: www.zipmap.net, Raimi + Associates, 2018

Figure 2-3 Study Area Small Area/Neighborhoods



- - - - ECR Plan Area Boundary

Source: Santa Clara County, Raimi + Associates, 2018

SC EL CAMINO REAL AT-A-GLANCE

TOTAL AREA



250 Acres in ECR Plan Area
2% of Santa Clara

PARKS/ 1000 RESIDENTS



89 acres of parks surrounding ECR Plan Area
3.27 acres/1000 residents

DEMOGRAPHIC

TOTAL POPULATION



27,163 people along ECR Corridor
22.7% of Santa Clara

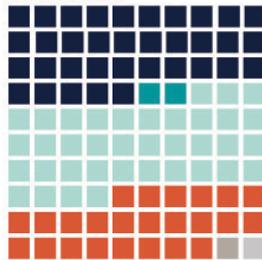
TOTAL HOUSEHOLDS



9,552 households in ECR Corridor
22.3% of Santa Clara

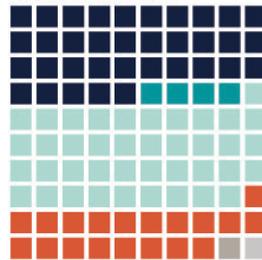
RACE / ETHNICITY

ECR Corridor



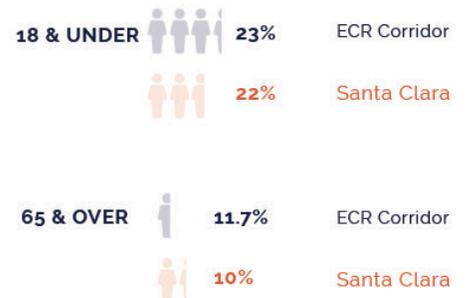
- White (35%)
- Black (2%)
- Asian & Pacific Islander (37%)
- Hispanic/Latino (24%)
- American Indian and Alaska Native (<1%)
- Other race (<1%)

City of Santa Clara



- White (35%)
- Black (4%)
- Asian & Pacific Islander (40%)
- Hispanic/Latino (19%)
- American Indian and Alaska Native (<1%)
- Other race (<1%)

AGE OF POPULATION



LANGUAGE SPOKEN (HOUSEHOLD)

ECR Corridor



- English only (41%)
- Spanish (14%)
- Other Indo-European languages (18%)
- Asian/Other Pacific Island language (24%)
- Other languages (3%)

City of Santa Clara



- English only (43%)
- Spanish (12%)
- Other Indo-European languages (17%)
- Asian/Other Pacific Island language (26%)
- Other languages (2%)

State of CA



- English only (58%)
- Spanish (25%)
- Other Indo-European languages (6%)
- Asian/Other Pacific Island language (10%)
- Other languages (1%)

LINGUISTIC ISOLATION



SC EL CAMINO REAL AT-A-GLANCE

EDUCATION

NOT HIGH SCHOOL GRAD



10.1%
ECR Corridor



8%
Santa Clara

COLLEGE DEGREE



49.2%
ECR Corridor



54.2%
Santa Clara

INCOME • POVERTY

MEDIAN HOUSEHOLD INCOME

ECR Corridor
\$85,808

Santa Clara
\$93,840

HOUSING

MEDIAN HOME PRICE

ECR Corridor
\$646,137

Santa Clara
\$633,600

% IN POVERTY



HOUSING TENURE



HEALTH

HEALTH STATUS

% of adults under 65 in fair or poor health

Zipcodes 95051, 95050 **15.6%**

Santa Clara **14.8%**

State of CA **19.2%**

% WITHOUT HEALTH INSURANCE

ECR Corridor **10.6%**

Santa Clara **8.9%**

State of CA **14.8%**

ADULT PHYSICAL ACTIVITY

% of adults who have walked for transportation or leisure for at least 150 minutes per week

Zipcodes 95051, 95050 **30.8%**

Santa Clara **31%**

State of CA **33%**

OBESITY

% of adults with BMI ≥ 30

Zipcodes 95051, 95050 **19.9%**

Santa Clara **19%**

State of CA **25.8%**

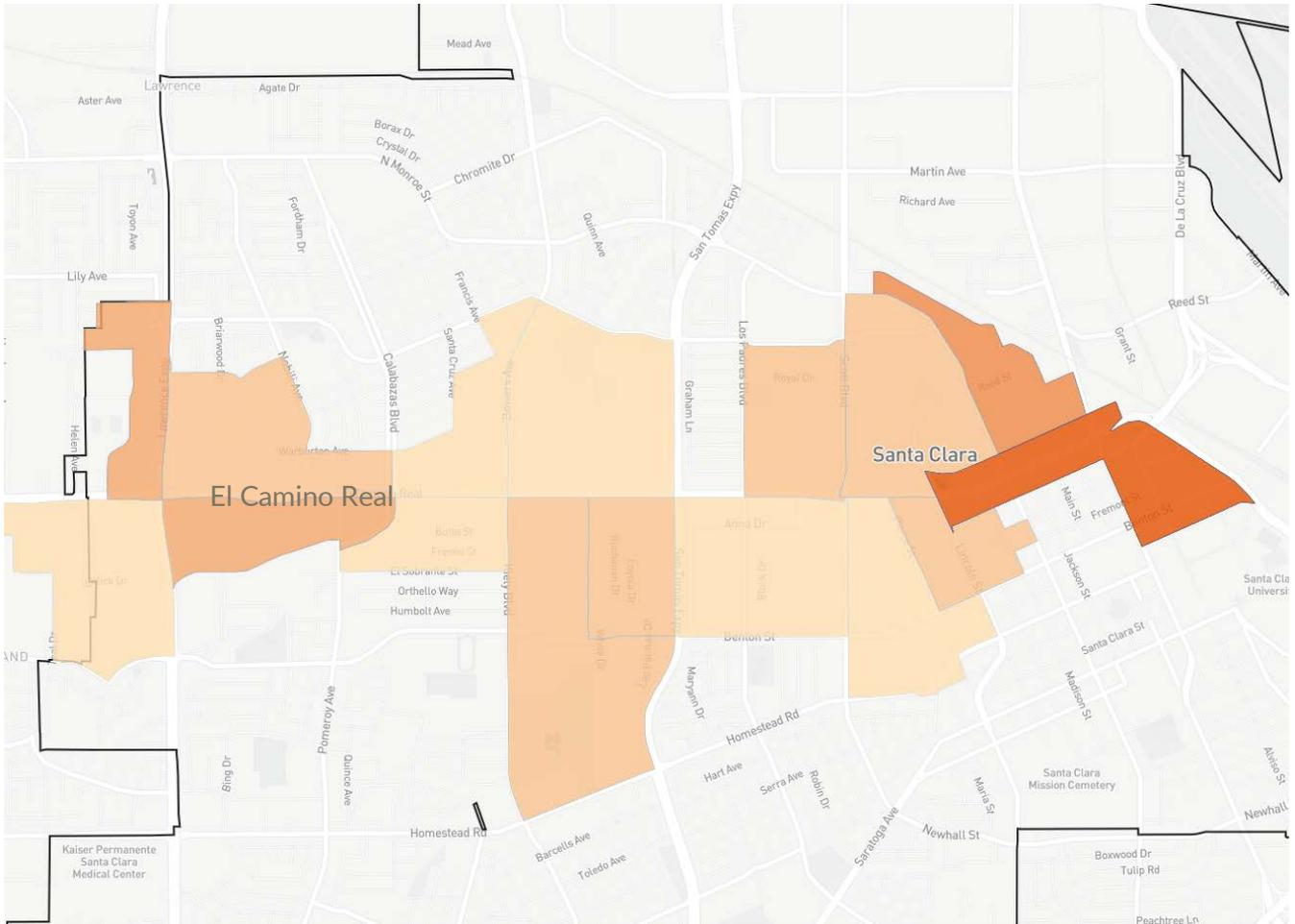
Population & Household Characteristics

The population in the El Camino Real Census Block Groups (ECR Block Groups) is approximately 27,163, or roughly 22.7% of Santa Clara overall. Overall, the corridor is generally similar to the City of Santa Clara overall in its social, housing, and economic makeup, with a few subtle differences. Both the area and City are ethnically diverse, with a high percentage of Asian and Latino residents. Population age distribution is also similar to the City overall, with approximately 23% of residents under 18, 75% of residents between the ages 18 and 65, and 12% over the age of 65.

The Latino share of the population in the ECR Block Groups is slightly higher than Santa Clara overall, with proportionately fewer Black and Asian residents. However, the largest ethnic minority is Asian, with 37% of the population identifying as Asian or Pacific Islander. Generally, the predominately Latino communities are located in the eastern portion of the corridor, while the neighborhoods on the west side of El Camino Real have a higher proportion of Asian residents. In addition, over half the population surrounding the corridor speaks another language besides English.

The block groups surrounding the El Camino Real corridor have marginally lower median incomes and a roughly equivalent poverty rate to those of the City overall. Poverty rates and incomes in the immediate vicinity of the Project Area (Figure 2-4 and Figure 2-5) vary significantly, but lower incomes and higher poverty rates seem to be more common in the eastern portion of the corridor, between El Camino Real and the Capitol Corridor train tracks. Correspondingly, education levels are slightly lower along the corridor than in the City of Santa Clara with more residents that have less than a high school education and fewer residents with college or post-graduate degrees.

Figure 2-4 Percentage of People Below the Poverty Line (by Census Block Group)



Source: 2009-2014 ACS, Urban Footprint, Raimi + Associates, 2018

Legend

Percentage of People below the Poverty Line (ACS 2010-2014)

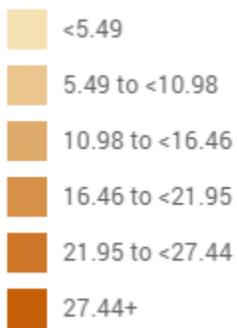
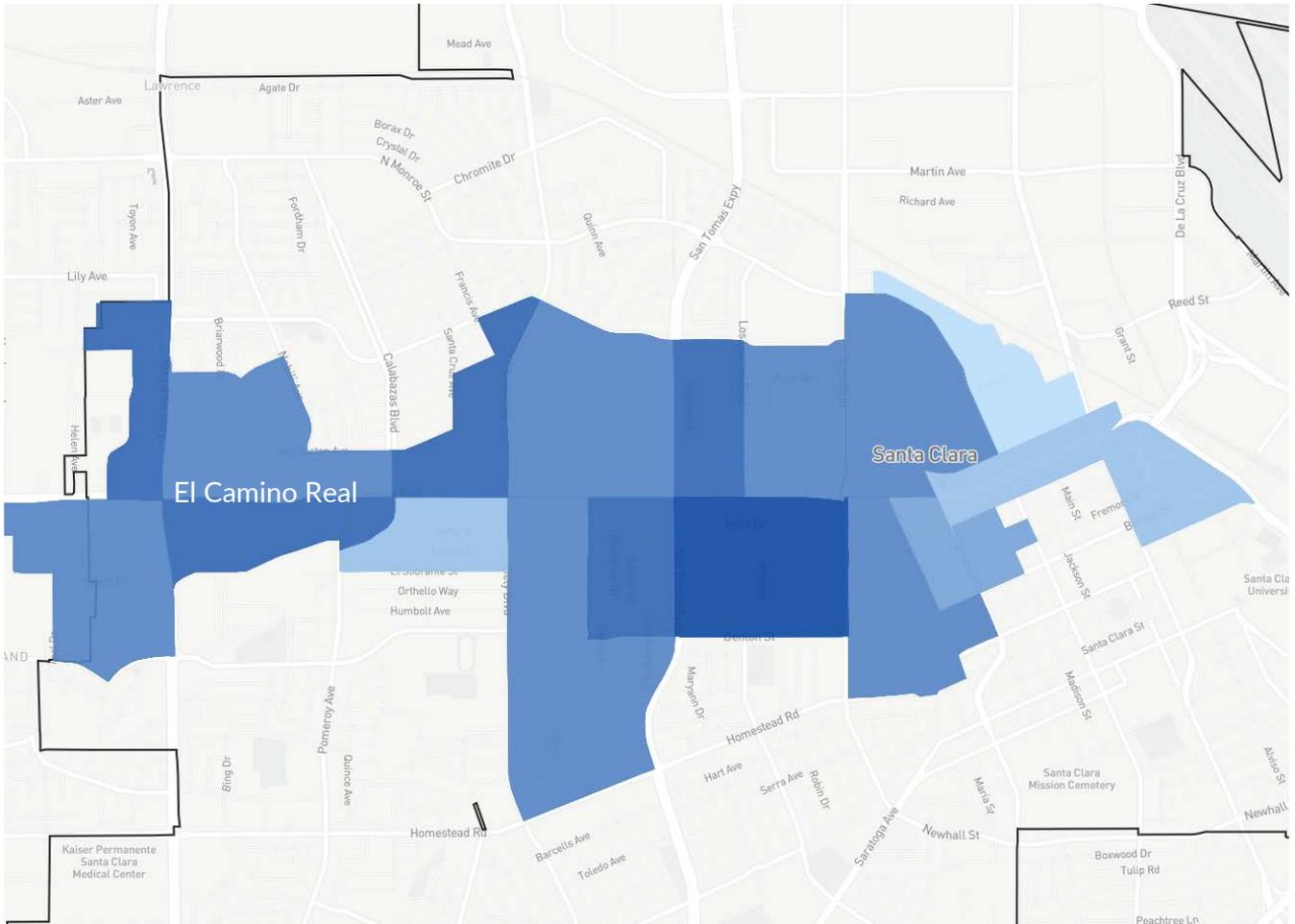


Figure 2-5 Median Household Income (by Census Block Group)



Legend

Source: 2009-2014 ACS, Urban Footprint, Raimi + Associates, 2018

Median Household Income (ACS 2010-2014)

- <46689.2
- 46689.2 to <62805.4
- 62805.4 to <78921.6
- 78921.6 to <95037.8
- 95037.8 to <111154
- 111154+

Vulnerable Populations

Certain segments of the population are more vulnerable to a variety of health and equity risks, including susceptibility to certain chronic diseases, poverty, and housing difficulty. These “vulnerable populations” – including those who are linguistically isolated, elderly, or living in overcrowded housing may be a particular focus for efforts to improve health, equity, and neighborhood amenities and housing.

Approximately 12% of the residents along the El Camino Real corridor are over the age of 65. There are several senior housing developments within Plan Area, including Gateway, Camino Del Ray Senior Apartments, Priya, and Villa Serena Retirement Community. Additionally, the Santa Clara Senior Center is located just two blocks south of El Camino Real at Fremont and Monroe St. Improved transportation access, affordable senior housing, accessible sidewalk facilities, medical facilities and services, and/or transit upgrades may be a priority in areas with a concentration of elderly residents.

As mentioned previously, over half of corridor residents speak another language besides English. The most common languages are Chinese, Tagalog, Laotian, or other Asian languages, Spanish, Indic languages (Hindi, Urdu, etc.), and Arabic. The percentage of linguistically isolated households, in which a majority of adult individuals speak limited English, is higher along the El Camino Real corridor than the City at about 13%. The Specific Plan process should incorporate creative strategies to engage with historically underserved community groups such as minority, elderly, youth, and non-English speaking residents and business owners in the Plan Area.

Health Characteristics

Data about health conditions, life expectancy and leading causes of death is not available at the census block group level. However, health data is available for the two zip codes that encompass the Plan Area and four small area/neighborhoods identified by the Santa Clara County Department of Public Health (see Figures 2-2 and 2-3). Information on health status, health care coverage, average life expectancy, rates of death from cancer and heart disease, fast food retail density, and childhood obesity can be found in Figure 2-4 and Table 2-1. Average life expectancy and rates of heart disease surrounding the corridor appear similar to the City of Santa Clara. However, the neighborhoods surrounding the Plan Area generally have higher rates of cancer.

As shown in Table 2-1 and Figure 2-4, health status for residents surrounding the Plan Area is slightly lower than the City overall, with higher obesity rates and lower rates of physical activity. Additionally, childhood obesity rates are higher than the City overall in the neighborhoods north of El Camino Real. The considerable number of fast food restaurants on El Camino Real and walkability issues along this wide thoroughfare could be factors contributing to higher obesity rates in the area. Better access to nutritious food and more opportunities for physical activity could reduce residents’ vulnerability to these diseases.

Table 2-1: Health conditions surrounding El Camino Real

Small Area/ Neighborhood	Life Expectancy	Cancer Deaths per 10,000 people	Heart Disease Deaths per 10,000 people	Number of fast food outlets per square mile	Children who are overweight for age (ages 2-11)
South 101	82.1	184.2	122.9	2.9	15-21%
East Central	81.5	139.5	162.2	5.9	6-8%
North Central	82.1	184.2	122.9	4	10-15%
West Central	83.2	169.7	102.8	5	6-8%
City of Santa Clara	83.4	140.3	118.8	2.8	12%

Crime

Figures 2-6 and 2-7 show property crimes and violent crimes in the vicinity of the Plan Area for a three-month period from August to November 2017. Property crimes seem to be dispersed along the corridor, with not discernible pattern or concentration in any particular area. Violent crimes generally appear more prevalent on the western side of El Camino Real around the Lawrence Expressway, but otherwise there does not appear to be a pattern along the corridor.

Figure 2-6 Property crimes in the vicinity of the Plan Area

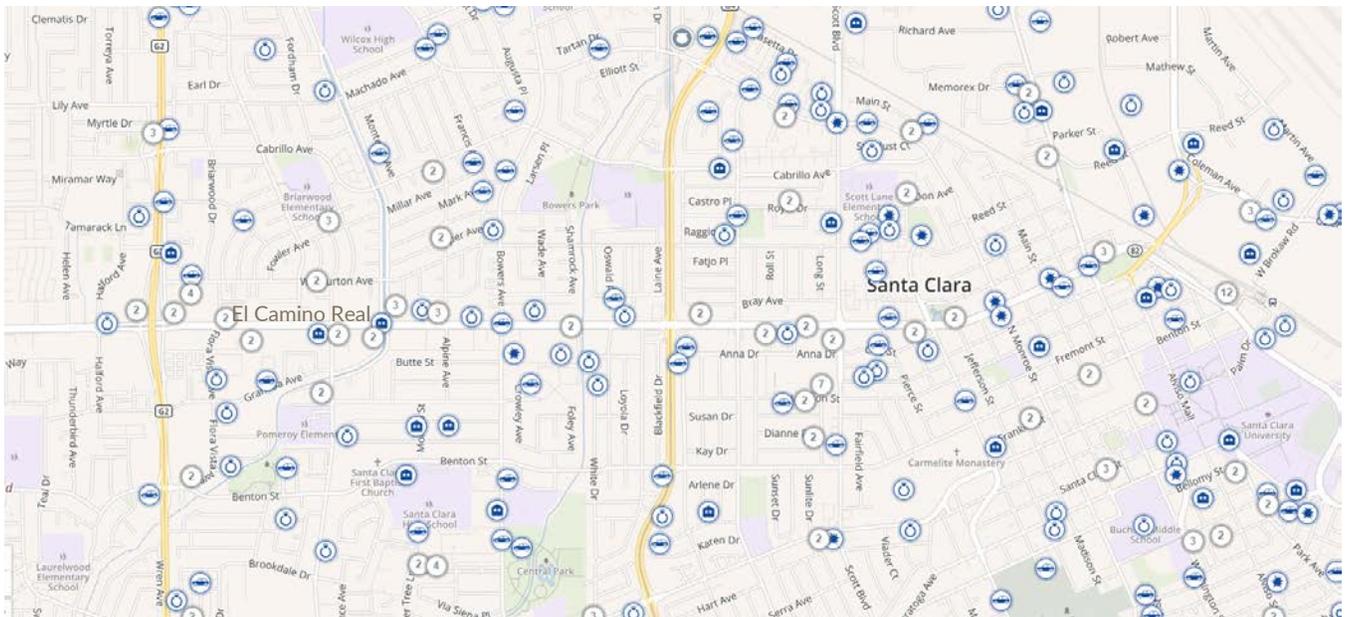
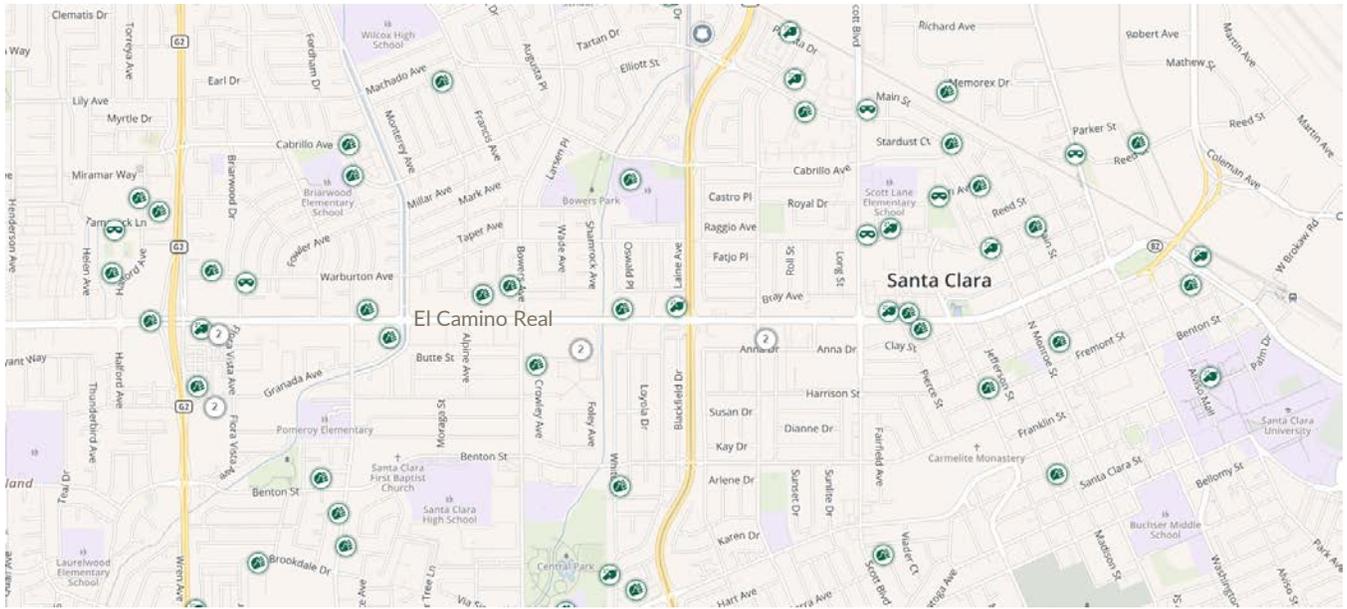


Figure 2-7 Violent crimes in the vicinity of the Plan Area



3

POLICY & PLANNING CONTEXT

Overview

This chapter provides an overview of the policy and planning context for the El Camino Real Specific Plan area. This includes relevant City of Santa Clara planning documents and regulations such as the General Plan, Zoning Code, and nearby area plans, as well as relevant planning efforts from Santa Clara Valley Transportation Authority (VTA) and the Association of Bay Area Governments (ABAG).

Santa Clara General Plan

The Santa Clara General Plan, adopted in November 2010, presents the vision for the evolution and enhancement of the Santa Clara community through the year 2035. The General Plan will be implemented in three phases – the first phase was completed at the end of 2014. The timeframe for implementation of Phase II is anticipated to be from 2015 to 2023, and Phase III is expected to occur between 2023 and 2035.

The General Plan designated the El Camino Real corridor as a “Focus Area” for redevelopment and included high level goals and policies for the corridor (see callout box below). One of these policies called for preparation of this Specific Plan to outline a more detailed vision, policies, and regulations for development along the corridor.

Figure 3-1 displays the General Plan 2035 land uses in the project area. A table of the acreages and percentages for each General Plan land use designation in the Plan Area can be found in Table 3-1.

The majority of the El Camino Real corridor in Santa Clara is designated Regional Mixed Use (42%) or Community Mixed Use (46%). Public facilities and parks/open spaces are generally consistent with what is currently on the ground today and account for approximately 5% of the Plan Area. The remaining few parcels are designated Medium or High Density Residential. The Housing Element estimates a potential capacity of 2,274 new housing units in the El Camino Real Plan Area between 2014-2022.

The 2010-2035 General Plan vision for El Camino Real is to transform this “Focus Area” from a series of automobile oriented strip malls to a tree lined, pedestrian and transit oriented corridor with a mix of residential and retail uses (see Figure 3-2). An important part of this specific plan process will be to revisit the General Plan direction and vision for the area and identify which components are still valid and which may need to change.

Larger properties along the corridor are typically designated as Regional Mixed Use and located at key intersections such as Lawrence Expressway and Scott Boulevard, with smaller mid block properties designated Community Mixed Use. The Regional Mixed Use classification is intended to promote high

intensity, mixed use development permitting all types of retail, local serving offices, hotel, and service uses, except for auto-oriented uses, to meet local and regional needs. This designation allows building heights between 3-5 stories, with a minimum commercial density of 0.15 FAR and minimum residential development of 37 to 50 units per acre. The Community Mixed Use classification is intended to encourage a slightly lower intensity mix of residential and commercial uses, but also allows for single uses. Retail, commercial and neighborhood office uses are allowed at a minimum FAR of 0.10, in conjunction with residential development between 20 and 36 units per acre. Lower profile development is encouraged in order to provide a transition to adjacent single-family neighborhoods. For both designations, parking is encouraged to be behind buildings, below grade or in structures, to ensure that active uses face public streets.

Part of the El Camino Real Specific Plan process will be to assess the vision and direction set forth by the General Plan to determine if they are still relevant and to propose modifications as needed.

El Camino Real Focus Area Goals

- 5.4.1-G1 An economically viable mix of uses along El Camino Real that attracts upscale retail uses.
- 5.4.1-G2 High quality design that respects the scale and character of adjacent residential neighborhoods and historic resources and creates a walkable environment.
- 5.4.1-G3 Concentration of higher-intensity commercial and residential development at key intersections with Regional Mixed Use designations.
- 5.4.1-G4 Pedestrian, bicycle and transit priority for mobility in the El Camino Real Focus Area.

El Camino Real Focus Area Policies

- 5.4.1-P1 Require that the mix of uses is consistent with the Regional Mixed Use land use classification and that development is pedestrian-oriented, with enhanced streetscapes, publicly accessible open space and plazas, and connections to surrounding neighborhoods.
- 5.4.1-P2 Allow new development under the Community Mixed Use designation for exclusively residential or commercial uses provided that it meets the minimum requirements for the Medium Density Residential or Community Commercial land use classifications.
- 5.4.1-P3 Allow a ten percent increase in the maximum residential density if access to regularly scheduled transit to the Santa Clara Station, Lawrence Station and employment centers north of the Caltrain corridor is within one-quarter mile.
- 5.4.1-P4 Explore allowing higher densities/intensities at key intersections where there are parcels of significant size with primary access to sites, provided that new development will not have an adverse impact on the existing, adjacent residential neighborhoods.
- 5.4.1-P5 Provide appropriate transition between new development in the Focus Area and adjacent uses consistent with General Plan Transition Policies.
- 5.4.1-P6 Encourage lower profile development, in areas designated for Community Mixed Use in order to minimize land use conflicts with existing neighborhoods.
- 5.4.1-P7 Require provision of open space, or payment of in-lieu fees for open space, consistent with City regulations to adequately serve new development.
- 5.4.1-P8 Orient ground floor retail and residential entries to the public sidewalk on El Camino Real.
- 5.4.1-P9 Residential development should include front doors, windows, stoops, porches, and bay windows or balconies along street frontages.
- 5.4.1-P10 Encourage structured and below-grade, rather than surface, parking in new development, to ensure that space at the ground level is devoted to active uses.
- 5.4.1-P11 Locate parking at the side or rear of parcels and active uses along street frontages.
- 5.4.1-P12 Highly encourage the development of affordable housing and senior housing that is well designed and compatible with adjacent uses in the El Camino Real Focus Area.
- 5.4.1-P13 Encourage the retention of on-street parking, particularly adjacent to Community Mixed Use designated properties.
- 5.4.1-P14 Encourage public art, special signage, banners and landscaping throughout the Focus Area, including features that would connect the corridor with Downtown.

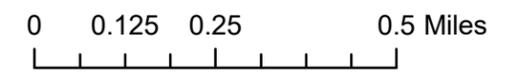
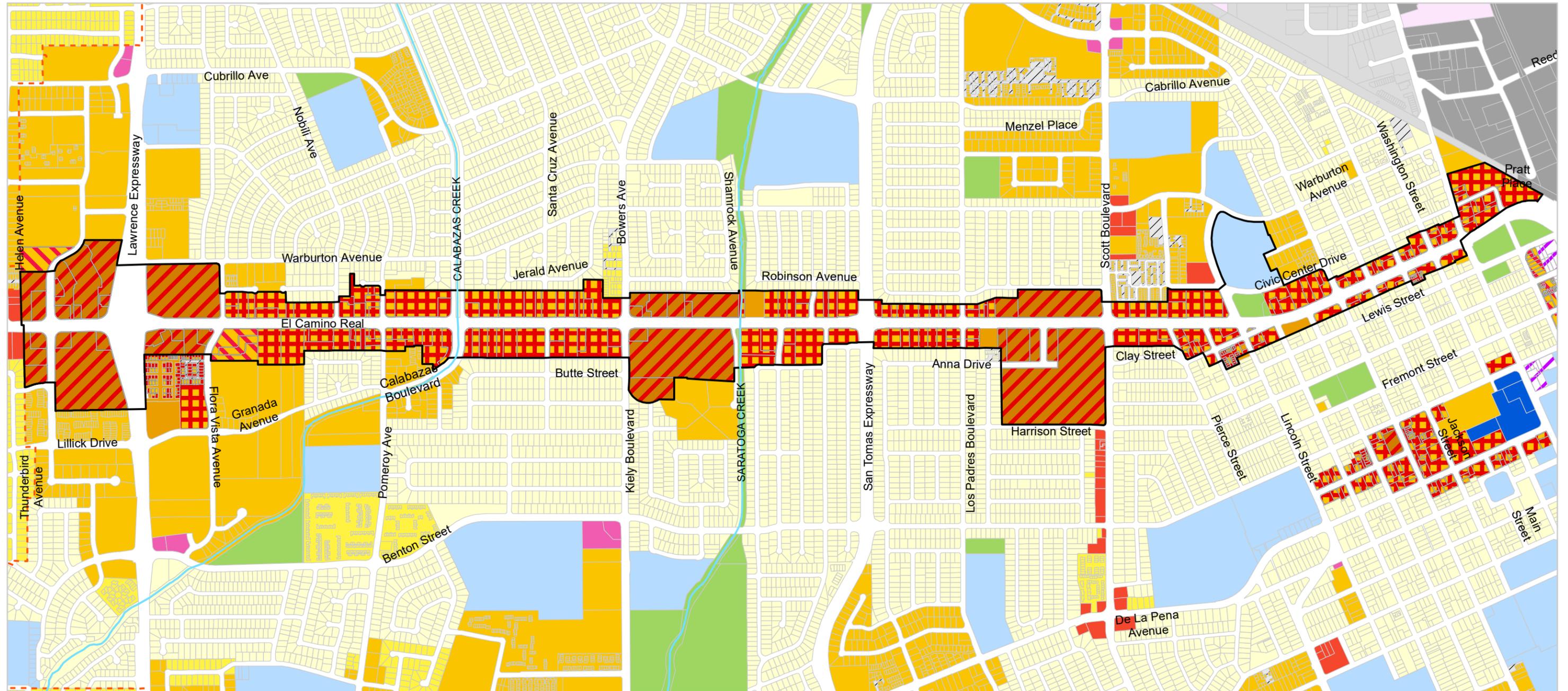
- 5.4.1-P15 Provide publicly accessible open space and transit stops in each Regional Mixed-Use area.
- 5.4.1-P16 Facilitate the implementation of streetscape improvements consistent with those illustrations in Figures 5.4-2.
- 5.4.1-P17 Explore options with Caltrans to relinquish the El Camino Real right-of-way to the City of Santa Clara.
- 5.4.1-P18 Work with Valley Transportation Authority to improve transit access, information and frequency along El Camino Real, including the implementation of a Bus Rapid Transit or similar transit service near Regional Mixed-Use areas.
- 5.4.1-P19 Work with Valley Transportation Authority and Caltrans toward a roadway design for El Camino Real that includes narrower and/or reduced travel lanes, enhanced pedestrian facilities, wider sidewalks, street trees, planted medians, and enhanced signage and lighting, as well as transit and bicycle lanes without increasing overall right-of-way requirements.
- 5.4.1-P20 Exempt El Camino Real intersections within this Focus Area from the City-wide Level of Service standard for vehicles on a case-by-case basis or until an alternate standard is adopted in conformance with the Prerequisite requirements.
- 5.4.1-P21 Exclude Specified Regulated Businesses from the El Camino Real Focus Area, except under certain circumstances within the Community Mixed-Use designation.
- 5.4.1-P22 Exclude new auto oriented uses and drive through establishments from the El Camino Real Focus Area, except new service stations may be approved under the Community Mixed-Use designation provided that the total number of service stations between Lawrence Expressway and Lafayette Street does not exceed the number existing as of January 1, 2010.
- 5.4.1-P23 Prepare a precise plan for the segment of El Camino Real between Scott Boulevard and the western City limits to ensure new development is coordinated and its design is consistent with what is envisioned for the Focus Area.

Table 3-1: General Plan Land Use in the Plan Area

General Plan Designation	Permitted Uses	Density/ Intensity	Acres	% of Total
Community Commercial	Community shopping centers and supermarkets, local professional offices, medical facilities, banks, restaurants, gas stations, and neighborhood-type services	0.5 FAR	2.0	1%
Community Mixed Use	Community retail, commercial, and office uses, and medium density residential	0.10 FAR 20-36 du/acre	115.8	46%
High Density Residential	Higher density residential development with an urban feel, with mid-rise buildings, structured or below-grade parking, and shared open space	3-50 du/acre	8.0	3%
Medium Density Residential	Medium density residential building types including low-rise apartments, townhouses and rowhouses with garage or below-grade parking	20-36 du/acre	0.9	0%
Neighborhood Mixed Use	Ground-level neighborhood-serving retail, service or office uses along street frontages and residential development on upper floors.	0.10 FAR 20-36 du/acre	6.2	2%

Parks/Open Space	Improved and unimproved park and open space facilities, managed natural resource areas, and outdoor recreation areas. Includes neighborhood, community, and regional parks, public golf courses, recreational facilities, and nature preserves	NA	3.0	1%
Public/Quasi Public	Variety of public and quasi public uses, including government offices, fire and police facilities, transit stations, adult care and child care centers, religious institutions, schools, cemeteries, and hospitals	NA	10.4	4%
Regional Mixed Use	Higher intensity retail, local serving offices, hotel and service uses, except for auto oriented uses, and high density residential	0.15 FAR 37-50 du/acre	104.0	42%
Total			250.3	100%

Figure 3-1 Existing General Plan Land Use Designations (2035)



Legend

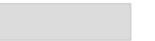
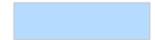
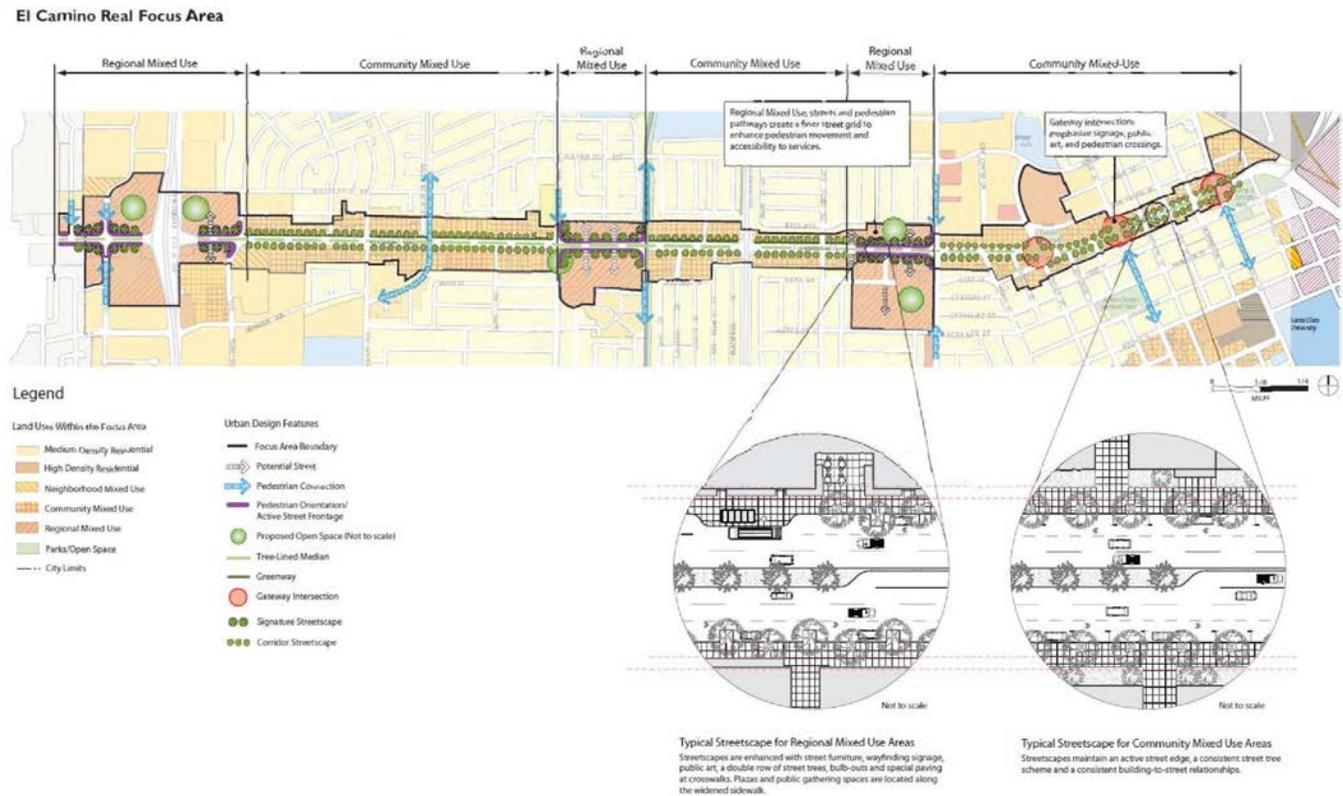
- | | | | | | |
|--|--|---|--|--|---|
|  City Boundary |  GP Designations |  Medium Density Residential |  Neighborhood Mixed Use |  Low Density Office / R&D |  Station Area Plan |
|  Plan Boundary |  Unknown |  High Density Residential |  Community Mixed Use |  Parks / Open Space |  Downtown Core |
|  Creeks |  Very Low Density Residential |  Neighborhood Commercial |  Regional Mixed Use |  Light Industrial |  Right of Way |
| |  Low Density Residential |  Community Commercial |  Public / Quasi Public |  Heavy Industrial | |

Figure 3-2 El Camino Real Focus Area (General Plan Diagram 2035)



Zoning Code

Existing zoning regulations in the El Camino Real Specific Plan area are established by the City of Santa Clara Zoning Code. Zones in the area are shown in Figure 3-3 and described in Table 3-2. The City is currently in the process of updating their zoning code and designations. The existing zoning designations and map are for the most part consistent with what is on the ground today. The Specific Plan process will need to take into account zoning modifications that impact the corridor, and may also inform the zoning code update to ensure that the appropriate zoning designations and development regulations are in place to implement the Specific Plan vision and land use framework.

The predominate zoning designations along the corridor are community commercial (36%) and thoroughfare commercial (40%). Both of these zones are intended for the development of medium to large retail shopping centers and auto-oriented commercial uses, and are consistent with the dominant existing character of the area. Office uses make up about 5% of the parcels in the Plan Area, and include Civic Center. A few light industrial parcels are located at the eastern edge of the corridor near Pratt Place and the Caltrain tracks.

There are handful of parcels along El Camino Real, as well as a number of large parcels just outside the corridor designated “Planned Development.” The intent of this designation is to integrate uses that are not permitted to be combined in other zone districts and/or establish a procedure for the development of larger parcels of land in order to reduce the rigidity, delays, and inequities that otherwise would result from application of zoning standards and procedures designed primarily for small parcels. PD zoning is meant to encourage parcel assembly for properties that might otherwise be developed in unrelated increments to the detriment of surrounding neighborhoods. Some of these parcels have been

developed and built since the zoning map was last updated, including Tuscan Towers Apartments, Alexis Condominium Complex, and Presidio El Camino. The future utility of the Planned Development designation will be explored in the El Camino Real Specific Plan process.

The neighborhoods surrounding the Plan Area mainly consist of single-family and medium/moderate density residential properties.

Within the Plan Area, heights allowed by the current Zoning Code range from 25 to 100 feet, dictated by the applicable zoning districts. As mentioned previously, most of the corridor is designated either community commercial or thoroughfare commercial, with allowed heights of 50 or 35 feet, respectively. The zoning code does not currently require height stepbacks for properties abutting residential neighborhoods.

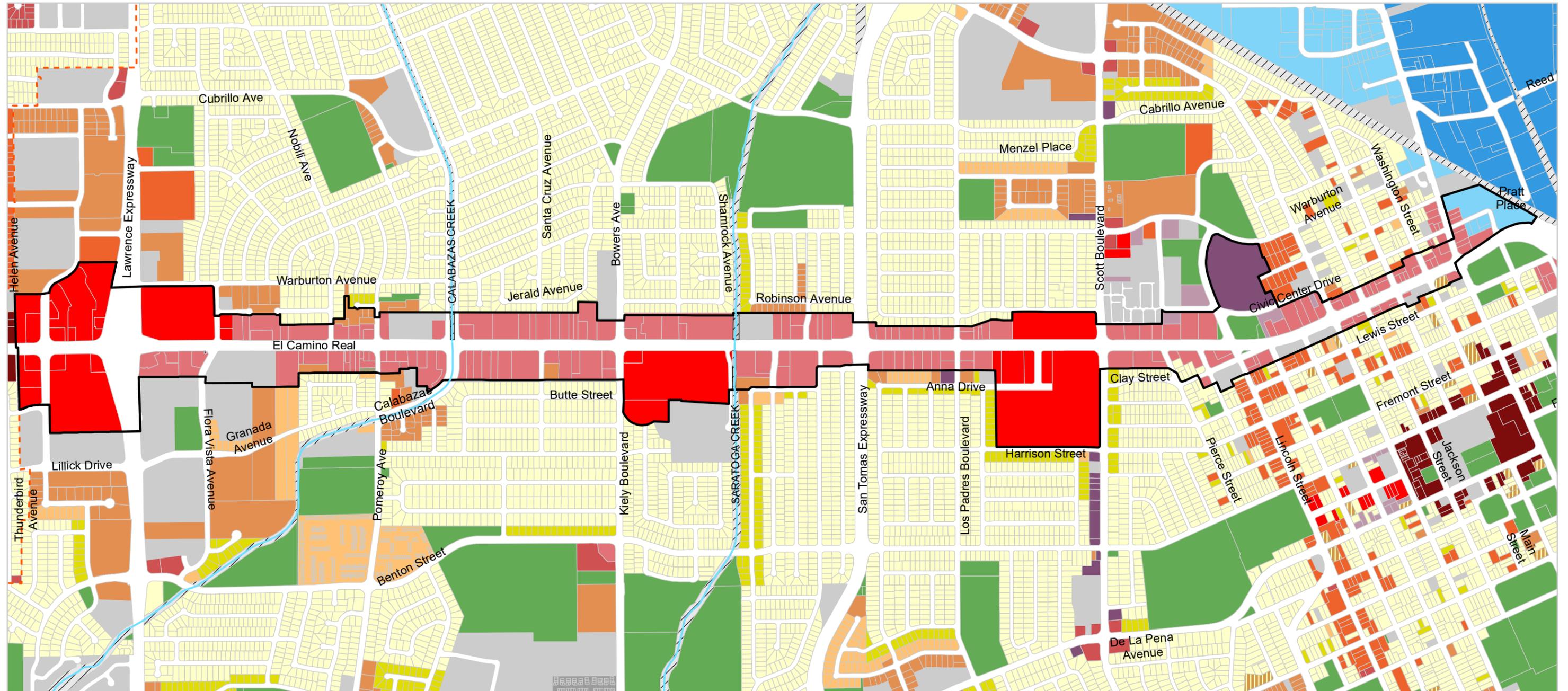
Table 3-2: Existing Zoning in the Plan Area

Zoning Designation	Allowed Height	Acres	% of Total	Allowed Uses
Thoroughfare Commercial	35 feet	103.6	40%	Retail business establishments, departments stores, shops, small offices, personal service uses, auto-related sales and services, motels/hotels, rental businesses
Community Commercial	50 feet	92.1	36%	Retail business establishments, departments stores, shops, small offices, personal service uses (e.g. hair salon, dry cleaner)
Planned Development	NA	20.9	8%	Any and all uses
Office Professional	35 feet	10.4	4%	Professional offices, clinics and pharmacies, nursing homes, preschools
Moderate Density Residential	2 stories/25 feet	8.5	3%	Single-family homes, duplexes, multi-family homes
Light Industrial	70 feet	6.4	2%	Commercial storage, wholesale warehouses, plants/facilities for light industrial uses such as assembly, manufacturing, compounding, processing, and repair
Single Family Residential	2 stories/25 feet	6.1	2%	Single-family homes
General Office	100 feet	2.5	1%	Financial and general business offices, clinics and pharmacies, preschools, lodges/clubs, mortuaries
Public/Quasi-Public	NA	2.2	1%	Public, quasi-public and public park facilities

Zoning Designation	Allowed Height	Acres	% of Total	Allowed Uses
Duplex Residential	2 stories/25 feet	2.0	1%	Single-family homes, duplexes
Total		255	100%	

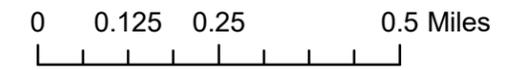
The existing zoning designations are primarily commercial, which do not allow housing and are thus inconsistent with the Regional Mixed Use and Community Mixed Use designations shown in the General Plan. An important goal for this project is to confirm the vision for the area and then align the zoning with the General Plan designations.

Figure 3-3 Existing Zoning Districts



Legend

- | | | | | | |
|---------------|----------------------------|------------------------------------|-------------------------|---------------------|--|
| City Boundary | Zoning | Low-Density Multiple Dwelling | Community Commercial | General Office | Planned Development - Master Community |
| Plan Boundary | No Value | Moderate-Density Multiple Dwelling | Downtown Commercial | Planned Industrial | Agricultural |
| Creeks | Commercial Park | Medium-Density Multiple Dwelling | Neighborhood Commercial | Light Industrial | Public or Quasi-Public |
| | Single Family | High Density Residential | Commercial Park | Medium Industrial | Unincorporated |
| | Single Family - Larger Lot | Historic Combining | Commercial Thoroughfare | Heavy Industrial | Water |
| | Residential Duplex | | Professional Office | Planned Development | |



Regional El Camino Real Planning Efforts

There have been a number of city-led corridor planning projects for El Camino Real along the Peninsula, including in the nearby cities of Sunnyvale (in process), Mountain View (adopted 2014), Menlo Park (adopted 2012), Palo Alto (2007 Master Plan), Redwood City (in process), and Belmont (in process), among others. Table 3-3 provides an overview of conditions and planning efforts along El Camino Real in nearby Cities. The width of the corridor varies from City to City but is generally six lanes wide (excluding turning lanes), with a few segments in Menlo Park, Redwood City and San Mateo that narrow to four lanes. Allowed heights along the corridor generally range from 25 to 55 feet. Higher building heights are allowed in several cities such as Menlo Park and Redwood City where El Camino Real passes through their downtown district. Existing uses along the corridor are generally commercial and office, with some medium density residential. Many nearby cities that have drafted specific plans for El Camino have redesignated land uses along the corridor to encourage horizontal and/or vertical mixed use in the future. As part of the corridor planning effort, most cities have chosen incorporate community benefits agreements and/or density bonuses for new development, and require active ground floor uses along El Camino. These nearby efforts can provide helpful precedents, lessons learned, and areas of potential alignment that Santa Clara could apply to its own stretch of El Camino Real.

Grand Boulevard Initiative

The Grand Boulevard Initiative is a collaborative effort of 19 cities, counties, local and regional agencies stretching from Daly City to San Jose, to create a more livable, beautiful, and well-connected regional corridor. It aims to promote high quality building designs and diverse land uses, preserve historic buildings and places, support excellent transit service, and enhance economic and cultural diversity, with the broad involvement of residents, workers and local businesses.

Table 3-3: Analysis of Nearby Plans for El Camino Real

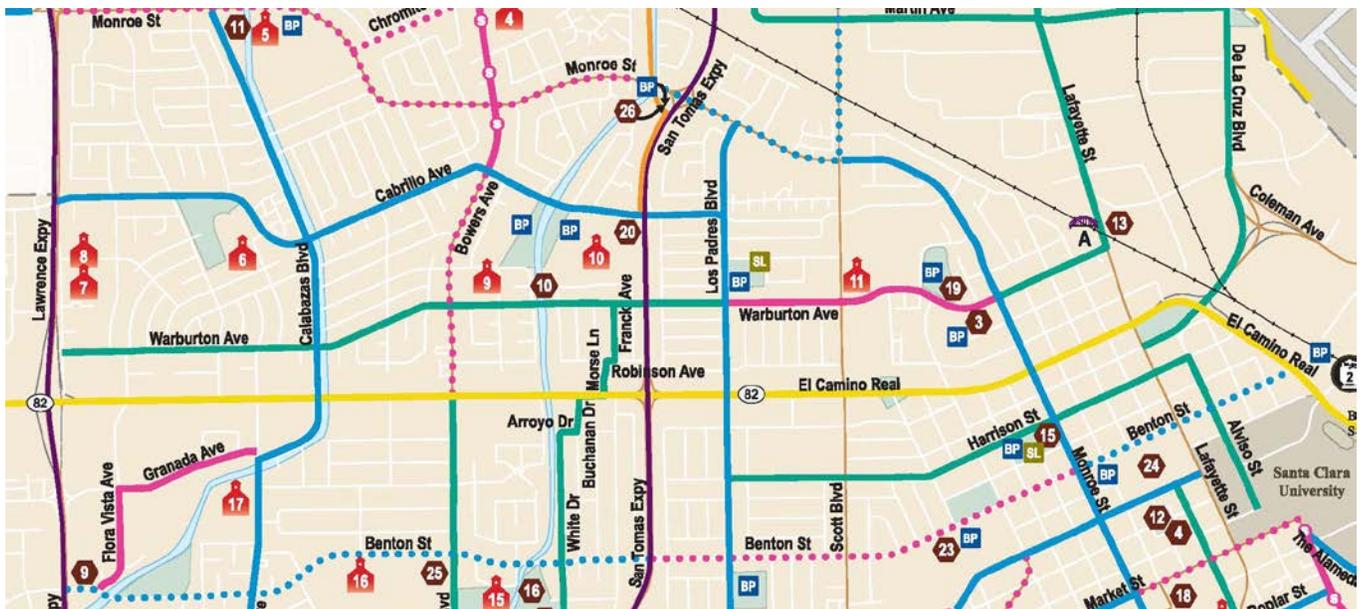
City	Existing SP?	# ECR lanes	Maximum Allowed Height	Community Benefits/Density Bonus	Zoning Overlay?	Predominate Existing Uses	Predominate Allowed Uses	Nodes/Focus Areas?	Active ground floor required?
Sunnyvale	Y (2007, update in progress)	6	55 ft (30 ft within 75 ft of residential)	Y	Y	Commercial retail, auto dealerships/ auto-related services, hotels Minimal public facilities, high-density residential and mixed-use	Highway Business Commercial (Retail), limited public facilities and high-density residential. Vertical mixed-use encouraged.	Y	N
Mountain View	Y	6	45-55ft; 55-75ft with bonus	Y	Y	Office, commercial retail, auto-related services, hotels Some medium/high density residential	Commercial retail (including restaurants, services), office, residential. Vertical and horizontal mixed use allowed.	Y	Y
Palo Alto	Y	6	25-50ft	Y (general affordable housing density bonus)	?	Public, office/medical, commercial retail, mixed-use, residential (SF and MF), hotels	Neighborhood and service commercial, public/institutional, research/office park Limited regional community commercial, hotel, and single/multi-family housing	N	N
Menlo Park	Y	4-6	38-60ft	Y	N	Commercial retail, multi-family residential, some office and public/institutional	ECR mixed-use, downtown mixed-use, downtown/station mixed-use, ECR mixed use/residential Vertical and horizontal mixed-use allowed	Y	Y

City	Existing SP?	# ECR lanes	Maximum Allowed Height	Community Benefits/Density Bonus	Zoning Overlay?	Predominate Existing Uses	Predominate Allowed Uses	Nodes/Focus Areas?	Active ground floor required?
Redwood City	Y (Draft Oct 2017)	4-6	Generally 40-75ft, up to 136 ft in Downtown	Y	Y	Commercial retail, motels, auto-related services, residential, industrial Limited mixed-use, office, multi-family residential, and public facilities	Mixed use downtown, mixed-use general commercial/residential, neighborhood mixed-use Minimal general commercial and public/institutional	Y	Y
San Mateo	Y	4-6	24-75ft	Y	Y	Multi-family residential, commercial retail, office, some auto-related services Limited public/institutional and mixed-use	Downtown commercial, regional/community commercial, retail mixed-use, office mixed-use, residential mixed-use, multi-family residential, office	Y	N

Santa Clara 2009 Bicycle Plan Update

Adopted in 2002, the City of Santa Clara's 2009 Bicycle Plan Update is a blueprint for expanding the bicycle network that will promote safer alternative modes of transportation and help position the City for future funding for bicycle projects and roadway improvements benefiting the cycling community. The plan identified El Camino Real as the street with the highest percentage of bicycle collisions in the City, and El Camino was ranked as the top priority street for new bicycle facility improvements by the community. Proposed bicycle facilities along El Camino Real are shown in Figure 3-4 below. The plan proposes El Camino Real as a future partnering agency route, and does not specify any recommended facilities or improvements. There may be opportunities through the specific plan process to more clearly identify the desired types of on-street bicycle facilities along El Camino Real, while also confirming how various cross-streets access and cross the corridor.

Figure 3-4 Santa Clara 2009 Bicycle Plan



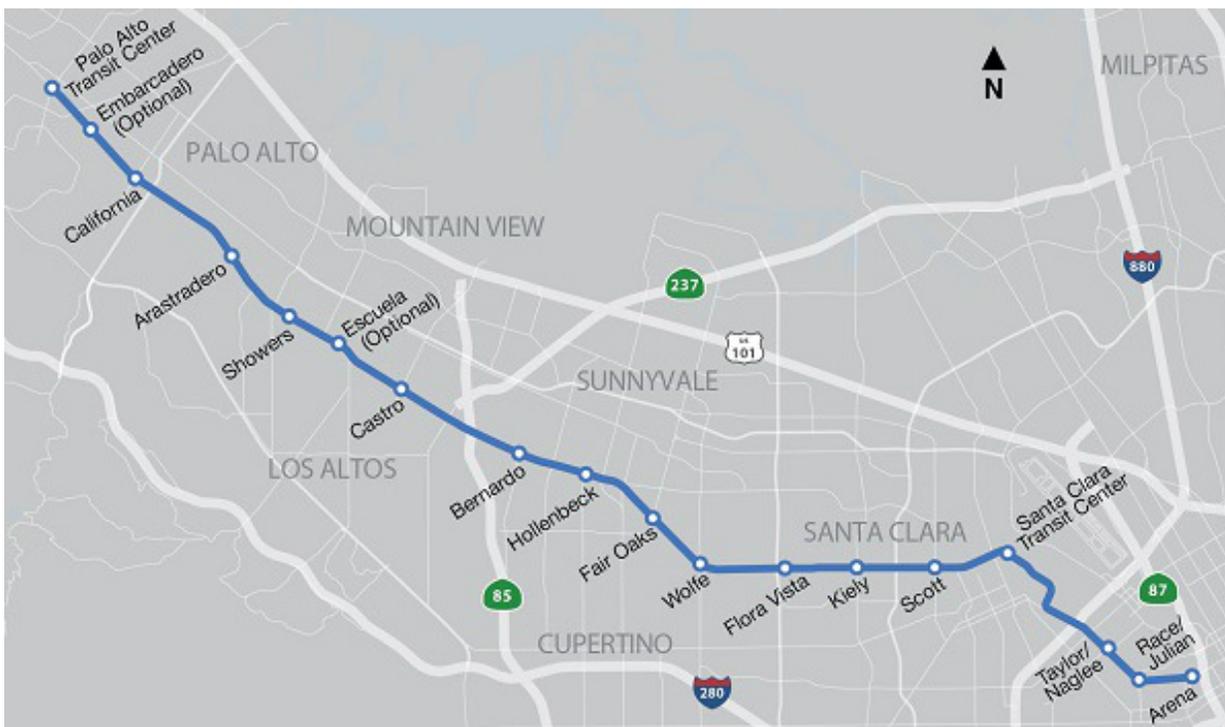
LEGEND

- Santa Clara City Limits
- Existing Class I Bike Path
- Existing Class II Bike Lane
- Existing Class III Bike Route w/Sharrow
- Existing Class III Bike Route
- Existing Unpaved Bike Path
- Existing County Bike Facilities
- Proposed Class I Bike Path
- Proposed Class II Bike Lane
- Proposed Class III Bike Route
- Future Proposed Routes
- Future Partnering Agency Route
- Rail
- BP Bicycle Parking Location
- SL Showers & Lockers

VTA El Camino Real Bus Rapid Transit

VTA is currently studying design options for bus rapid transit (BRT) and other express bus service throughout Santa Clara County, including potential BRT lines along El Camino Real between Palo Alto and San Jose. The Project would include mixed-flow lanes (lanes for all vehicular travel) and could include dedicated lanes (lanes for exclusive use of BRT and emergency vehicles). The Project would include upgraded BRT stations to accommodate buses that would allow boarding level with the curb, pedestrian and bicycle enhancements, augmented landscaping, street lighting, and intersection improvements. The Project would also enhance the existing traffic signal system, giving buses priority over general vehicular traffic. BRT would offer more frequent service with 10 minutes between buses (referred to as a 10-minute headway), in comparison with the current 15-minute headway for VTA's Rapid 522 bus line. Proposed stops along ECR in Santa Clara include Flora Vista, Kiely, Scott, and at the Santa Clara Transit Center, as shown in Figure 3-5 below. The El Camino Real Specific Plan will need to consider the proposed BRT alignment and stops along El Camino and potentially incorporate them into the transportation framework of the Plan.

Figure 3-5 Proposed BRT Alignment & Stops



Plan Bay Area and PDAs

Plan Bay Area was jointly approved by Bay Area Metro (formerly ABAG and MTC) in 2013, and is currently undergoing a strategic update called Plan Bay Area 2040. Plan Bay Area is the Bay Area's Sustainable Community Strategy (required by the state per Senate Bill 375), which provides an imperative to reduce greenhouse gas emissions by creating more livable, equitable, and environmentally sustainable communities. It addresses land use, transportation, housing, economics, and sustainability in an integrated regional development plan for the Bay Area, with a particular focus on walkability and transit-oriented development.

PDA Process and Criteria

Plan Bay Area was developed and is being implemented in close consultation with local governments and communities, who maintain land use control over areas within their jurisdiction. An important component of Plan Bay Area is the establishment of Priority Development Areas (PDAs). The City Council of a given city can nominate PDAs within its jurisdiction, representing an area where there is a commitment to developing more housing, amenities, and services to meet community needs in a walkable, transit-oriented setting. PDAs are required to be within an existing community; to be near existing or planned fixed transit service such as BART or high-frequency, rapid bus service; and to have an approved TOD Plan in place.

Five areas within Santa Clara containing two to several parcels each have been identified as PDAs. These areas are primarily concentrated along the entire length of Tasman Drive, El Camino Real and Stevens Creek Boulevard within the City, as well as the Santa Clara Station area and two parcels near the Lawrence Station area. The El Camino Real PDA was established by ABAG and the City in 2011 and in the regional Plan Bay Area adopted by ABAG and MTC in 2013.

An interactive map and overview of all Bay Area PDAs is available from ABAG here:
<http://gis.abag.ca.gov/website/PDAShowcase/>

4

LAND USE & URBAN FORM

Overview

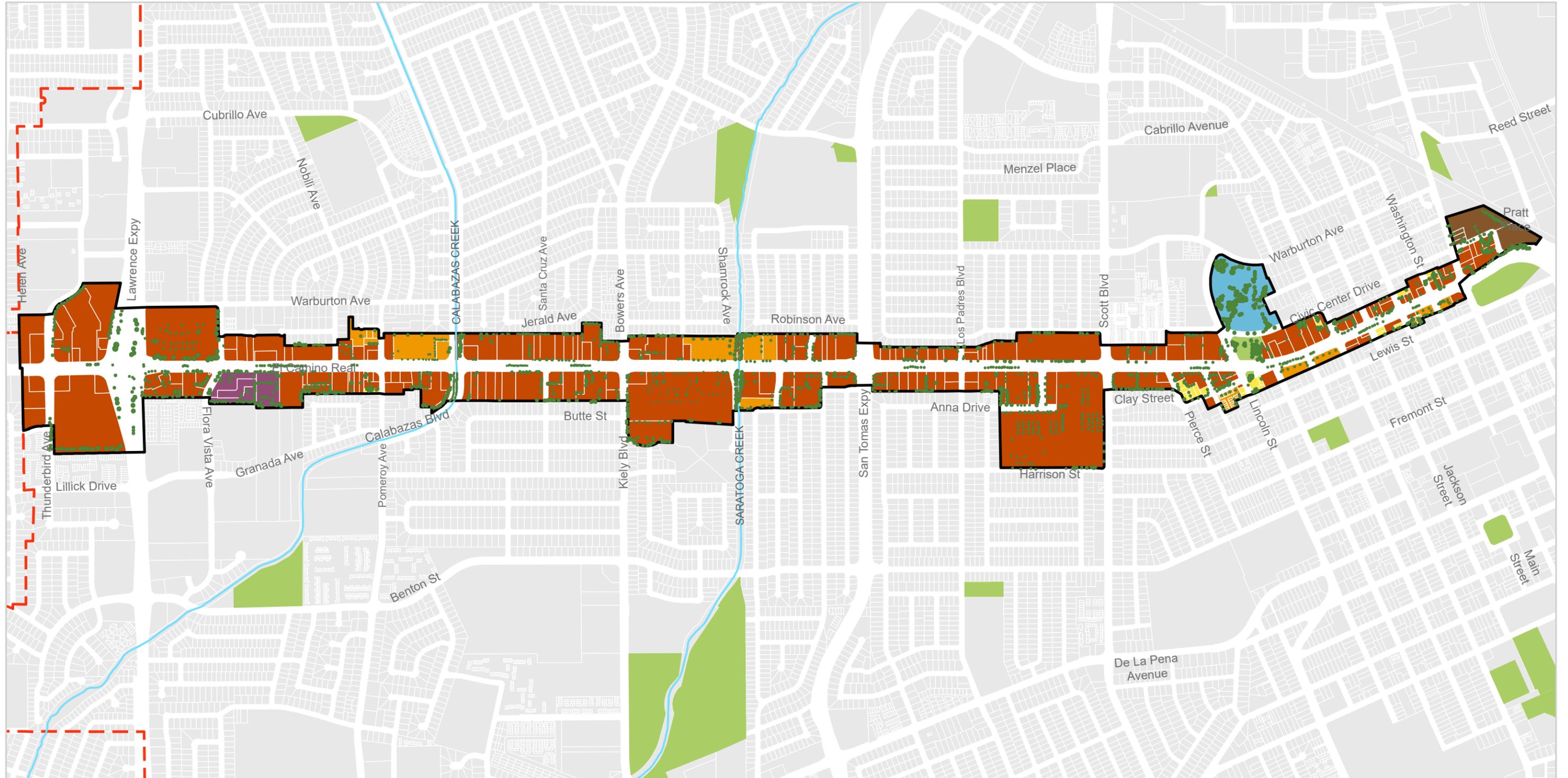
This chapter provides an overview of the El Camino Real Specific Plan Area's land use pattern, urban structure, and distinguishing features. This underscores the possibilities for the future of the area, and will influence the development of alternatives for the future.

Existing Land Use and Development Pattern

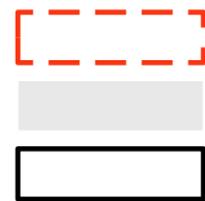
Figure 4-1 shows existing land uses by parcel. The most common land use in the El Camino Real Specific Plan Area is retail commercial, with smaller amounts of public/institutional, mixed-use, medium/high density residential, single-family residential, and light industrial making up the rest of the parcels. The surrounding neighborhoods are primarily single-family residential with some multi-family residential. There is roughly 900,000 square feet of commercial space along the corridor, 100,000 square feet of local office uses, and 650 residential units.

Overall, a large portion of the Plan Area is devoted to surface parking lots in front of strip shopping centers built in the 1950's and 60's. As shown in Figure 4-2, only about 30% of the Plan Area's buildable parcel land (excluding streets, rail rights-of-way, the creek, and parks) is occupied by buildings. Most of the remaining 70% is occupied by surface parking lots and associated drive aisles and landscaping. Some of this parking is in demand, but small changes to parking demand or requirements could also significantly increase the availability of developable land in the area.

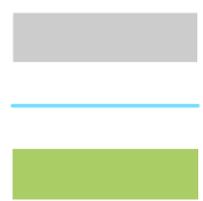
Figure 4-1 Existing Land Use



Legend



City Boundary
Parcels
Plan Boundary

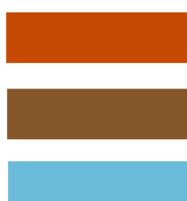


Plan Parcels
Creeks
Parks

Existing Land Use



Single Family Residential
Multi Family Residential
Mixed Use



Commercial
Industrial
Institutional

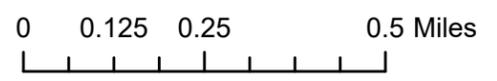
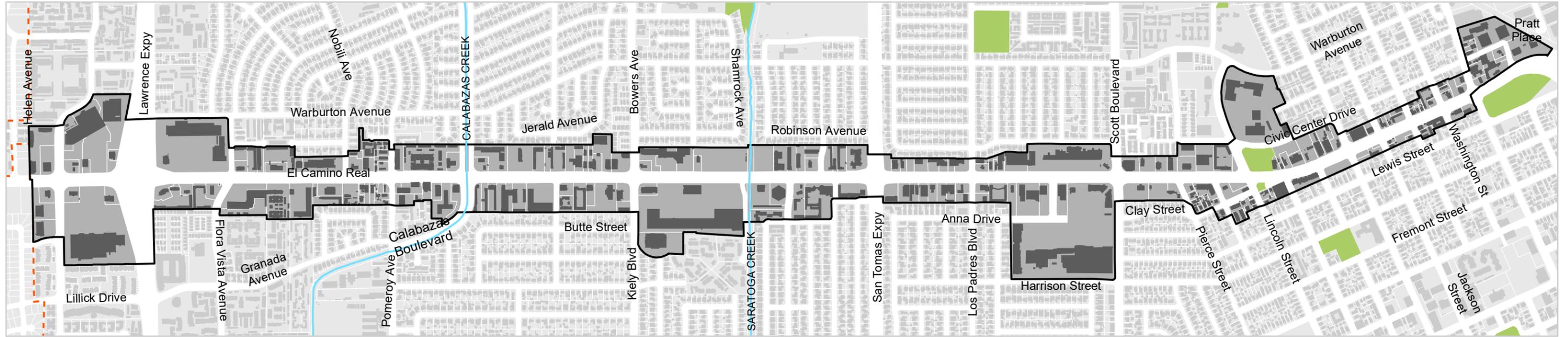


Figure 4-2 Building Footprints



Legend

- City Boundary
- Plan Boundary
- PDA Parcels
- Creeks
- Parks
- Building Footprints

0 0.125 0.25 0.5 Miles

A scale bar showing increments of 0.125 miles up to 0.5 miles. To the right of the scale bar is a north arrow pointing upwards.

Parcel Size and Pattern

The size and pattern of parcels has a significant impact on the character, future development possibilities, and feasible building types for a given planning area. Small or irregularly-shaped parcels are often challenging to develop, particularly those smaller than one acre along corridors or in retail areas. This is both because the profit margins and return on investment are often smaller, and because it can be difficult for smaller sites to accommodate standard zoning requirements such as open area, parking, or side and rear setbacks. At the same time, small, fine-grained parcels and buildings can create a charming, pedestrian-scale street character and diverse building frontage. Consequently, it can be helpful to customize development regulations that apply to small parcels to make them more flexible and compatible with smaller parcels and development projects. In other cases, it may be appropriate to encourage aggregation of small parcels into larger development sites.

Large parcels are often viewed as more profitable and attractive to develop, with more flexibility to accommodate required or desired design features. At the same time, the larger projects often found on larger parcels can require more careful attention to frontage design, scale, massing, internal circulation, and transitions to adjacent uses to ensure they provide a fine-grained, pedestrian-oriented character.

As shown in Figure 4-3, the El Camino Real corridor area has a broad mix of small, medium, and large parcels. The largest parcels are Civic Center and the significant strip shopping centers along the corridor – namely the parcels on either side of the Lawrence Expressway, Moonlite Center at Kiely Blvd (13.7 acres), El Camino Center (6.36 acres) and Santa Clara Shopping Center (21.1 Acres) at Scott Blvd and El Camino Real. There are only 6 parcels over 5 acres in size and they account for 30% of the Plan Area. These large parcels offer opportunities for change or infill development in the future, although many are currently in stable use as retail shopping centers. The remaining 70% of parcels along the corridor are under 5 acres in size and relatively shallow. Most of these parcels are about 130 feet wide with depths ranging from 80 to 350 feet. Plan alternatives should explore ways to activate and incentivize reinvestment in these small, shallow parcels.

Height and Adjacencies

As shown in Figure 4-4, most buildings along El Camino Real are generally 1-2 stories in height, with some newer 3-4 story mixed use and residential developments scattered along the corridor.

The Plan Area is mainly surrounded by low or medium density residential neighborhoods, with the exception of its borders around the Lawrence Expressway, around Civic Center, and at the eastern end of the corridor near the Caltrain tracks (see Figure 4-1). As a result, transitions and adjacencies to residential neighborhoods will be an important theme and design imperative throughout the course of the El Camino Real planning process. Figure 4-5 shows that most of the residential parcels surrounding the El Camino Real corridor area directly abut non-residential or higher density parcels within the Plan Area. Given this condition, it will be particularly important for the plan to provide design guidance for appropriate, well-scaled transitions to adjacent residential neighborhoods.

Figure 4-3 Parcel Size

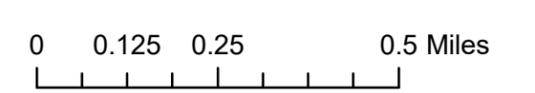
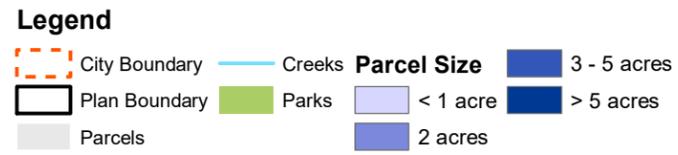
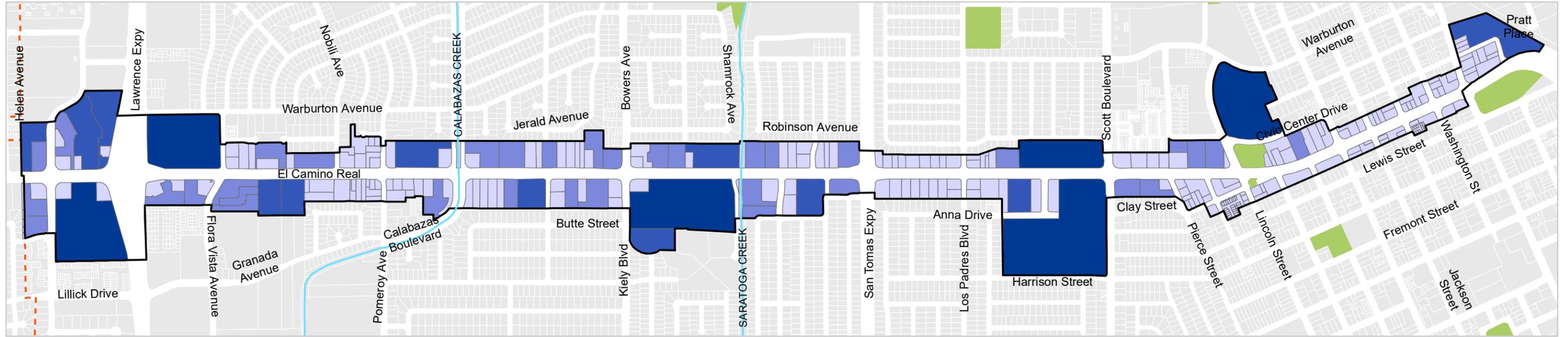
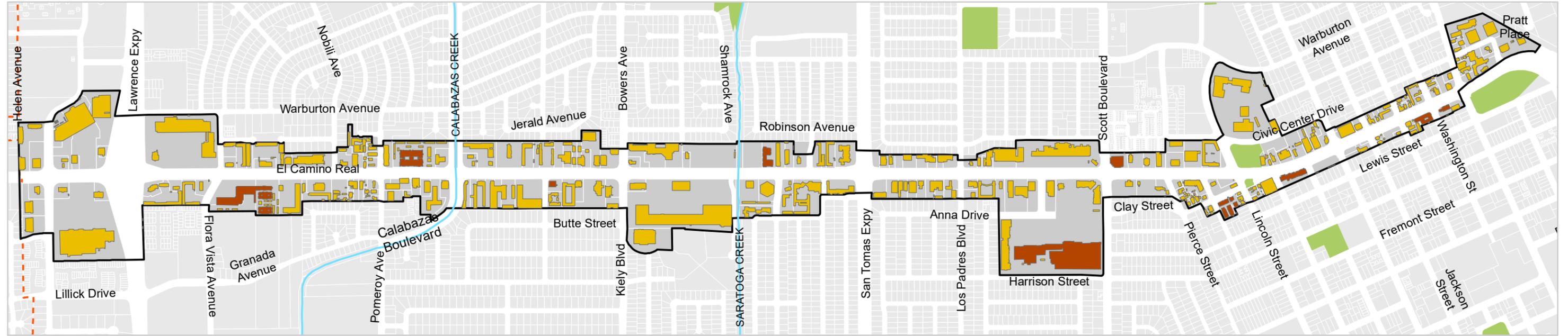


Figure 4-4 Existing Building Heights



Legend

- City Boundary
- Creeks
- Parks
- PDA Boundary
- PDA parcels

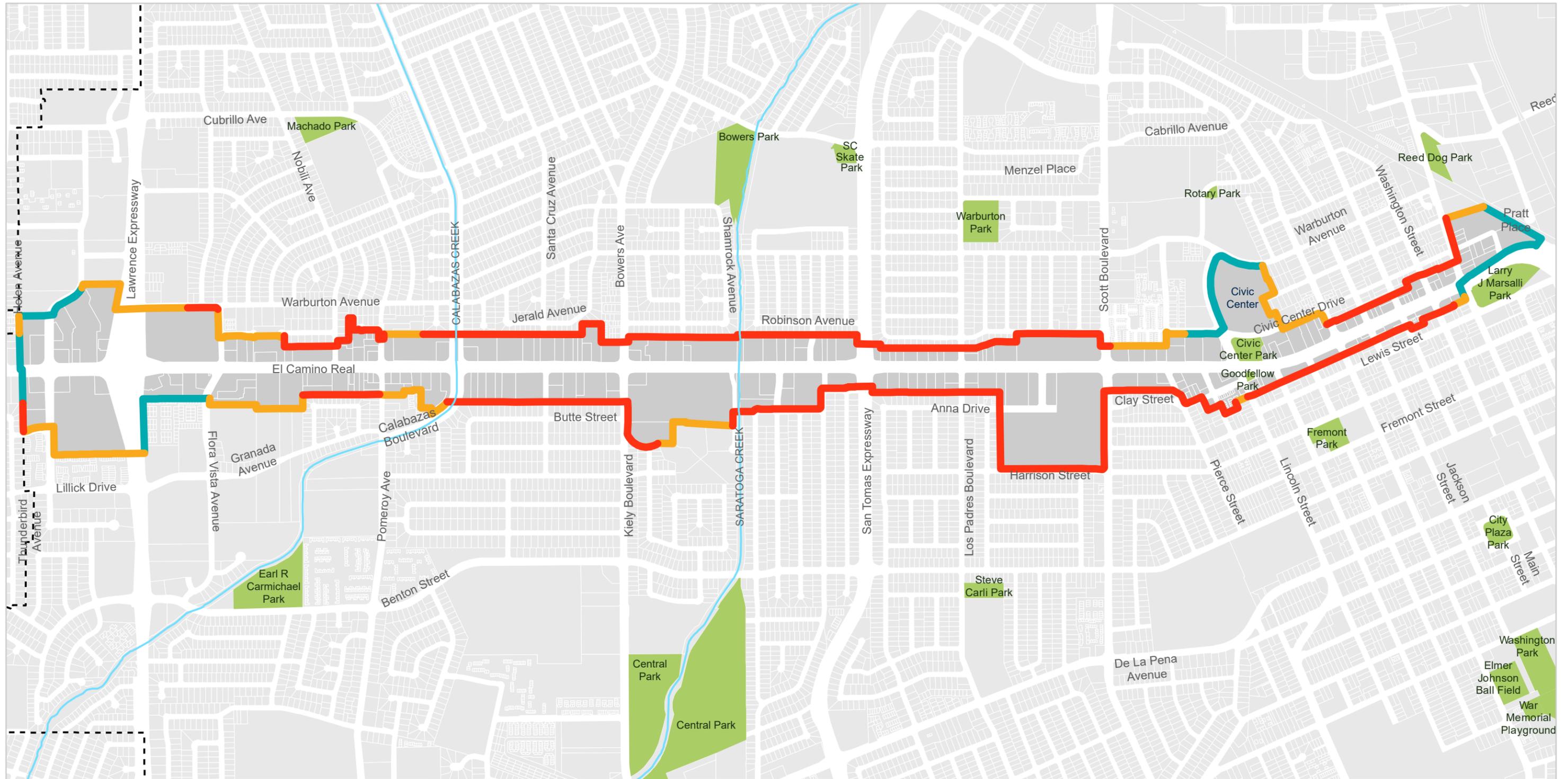
Building Height

- 1-2 stories
- > 2 stories

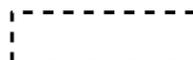
0 0.125 0.25 0.5 Miles

A scale bar showing increments of 0.125 miles up to 0.5 miles. To the right of the scale bar is a north arrow pointing upwards.

Figure 4-5 Plan Area Adjacency to Residential Parcels

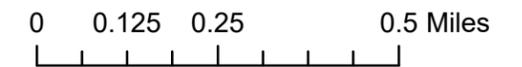


Legend

-  City Boundary
-  Plan Parcels
-  Parcels
-  Creeks
-  Plan Boundary
-  Parks

Adjacent Allowed Uses

-  Plan Boundary Adjacent to Low Density Residential Zoned Parcels
-  Plan Boundary Adjacent to Medium Density Residential Zoned Parcels
-  Plan Boundary Adjacent to Non-Residential Zoned Parcels



Community Services & Facilities

Parks and Trails

The neighborhoods around the El Camino Real Specific Plan Area feature several community centers, parks, trails, and other public facilities, as shown in Figure 4-6, Figure 4-7, and Figure 4-8. These nearby parks and recreational facilities are shown in Table 4-1 below. Within the Plan Area itself there are two parks – Civic Center Park and Geof Goodfellow Sesquicentennial Park. Additionally, the San Tomas Aquino Creek Trail runs from Route 237 south through the City, ending at El Camino Real.

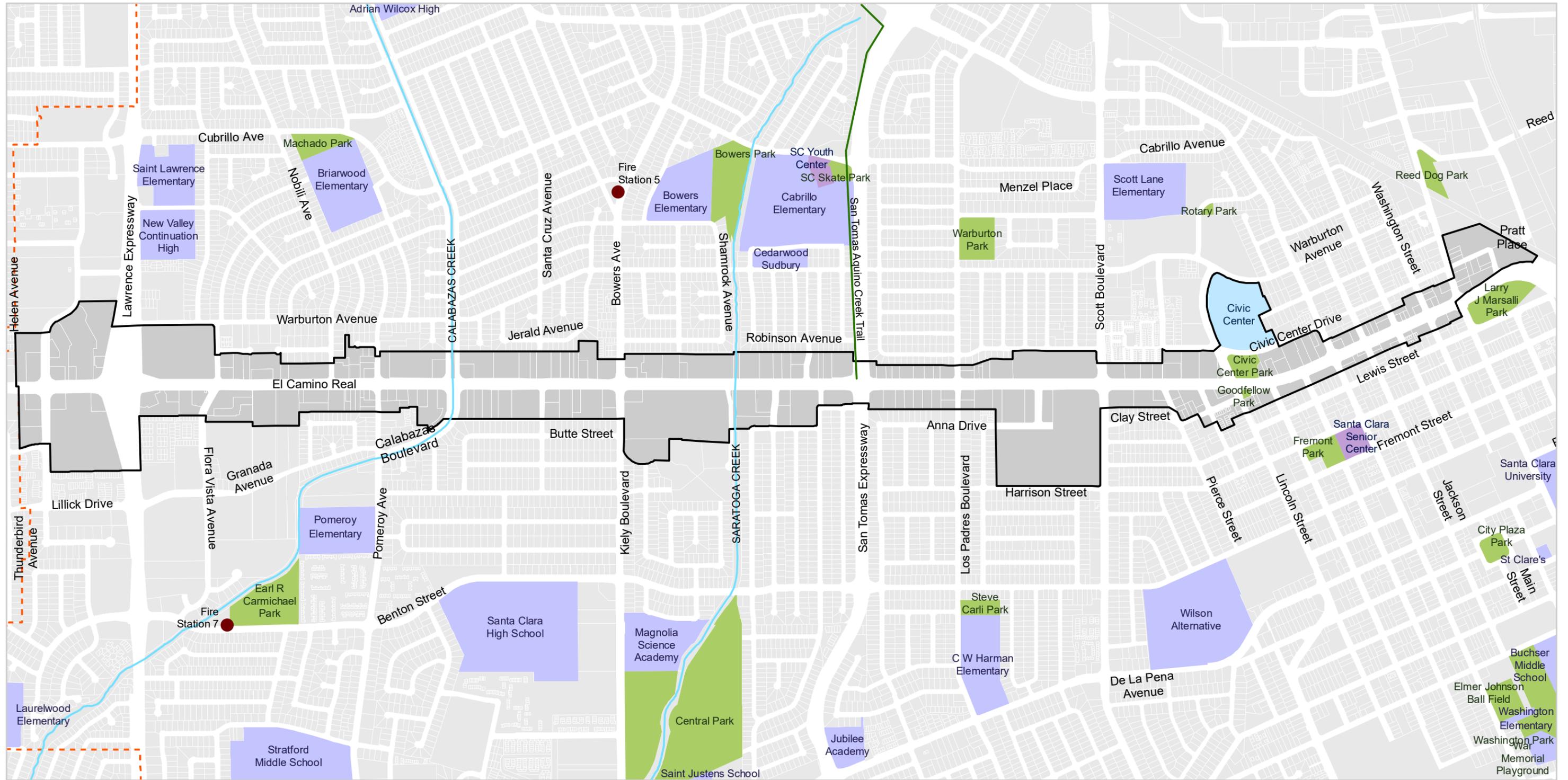
Central Park is one of three large community parks in the City, and is located just south of El Camino Real. There is a total of 89 acres of parks/recreational facilities within a half mile of the corridor, yielding a ratio of over 3 acres of park land per 1000 residents. As seen in Figure 4-7 and Figure 4-8, most of the Plan Area is within a half a mile of a park or recreational facility. However, most of the El Camino Real corridor is further than a quarter mile from a park, particularly along the western portion of the corridor. The eastern portion of the corridor has several parks within a quarter mile. Access and provision of parks and other public spaces like plazas and recreation areas will be an important consideration for any future development along the corridor.

Table 4-1: Parks in the Vicinity of the Plan Area

Park Name	Type	Acres
Bowers Park	Neighborhood Park	7.6
Central Park	Community Park	40.5
City Plaza Park	Neighborhood Park	1.6
Civic Center Park *	Public Open Space	1.7
Earl R Carmichael Park	Neighborhood Park	7.6
Elmer Johnson Ball Field	Recreation Facility	2.8
Fremont Park	Neighborhood Park	2.1
Geof Goodfellow Sesquicentennial Park *	Mini Park	0.2
Larry J Marsalli Park	Neighborhood Park	4.2
Machado Park	Neighborhood Park	2.6
Reed Dog Park	Recreation Facility	1.7
Rotary Park	Min Park	0.3
Santa Clara Skate Park	Recreation Facility	1.0
Steve Carli Park	Neighborhood Park	1.6
Townsend Field	Recreation Facility	4.8
War Memorial Playground	Mini Park	0.9
Warburton Park and Pool	Neighborhood Park	4.1
Washington Park	Neighborhood Park	3.4
Total		88.7

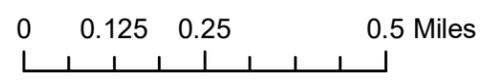
* Parks located within the Plan Area

Figure 4-6 Community Facilities



Legend

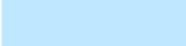
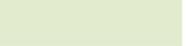
- City Boundary
- Parcels
- Plan Boundary
- Parks
- Community Centers
- Schools
- Civic Center
- Plan Parcels
- Creeks
- San Tomas Aquino Creek Trail
- Fire Stations (Santa Clara Fire Dept)



4-7 Park Access - 1/4 Mile



Legend

- | | | | | | |
|--|---------------|---|--------------|---|-----------------------|
|  | City Boundary |  | Plan Parcels |  | Community Centers |
|  | Parcels |  | Creeks |  | Parks |
|  | Plan Boundary |  | Civic Center |  | Parks 1/4 Mile Buffer |

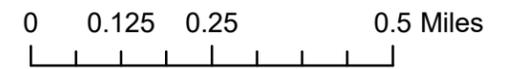


Figure 4-8 Park Access - Half Mile



Legend

- | | | | | | |
|--|---------------|---|--------------|---|-----------------------|
|  | City Boundary |  | Plan Parcels |  | Community Centers |
|  | Parcels |  | Creeks |  | Parks |
|  | Plan Boundary |  | Civic Center |  | Parks 1/2 Mile Buffer |

0 0.125 0.25 0.5 Miles



Community Facilities and Schools

The neighborhoods on either side of El Camino Real include a number of community facilities and services including several Elementary, Middle, and High Schools, the Santa Clara Youth Activity Center at Cubrillo Ave near San Tomas Expressway, the Santa Clara Senior Center at Fremont and Monroe Streets, and two fire stations operated by the Santa Clara Fire Department. There is a total of 17 public and private schools within a half mile of the Plan Area, as shown in Figure 4-6 and listed in Table 4-2. This includes Santa Clara University, an important community anchor and center of research, education and on-campus student life. The availability of existing schools and other public facilities will continue to be an important resource for existing and future residents along El Camino Real.

Table 4-2: Nearby Schools

School Name	Type
Emil R Buchser Middle School	Public
C W Harman Elementary School	Public
Magnolia Science Academy Santa Clara	Public
Santa Clara High School	Public
Wilson Alternative	Public
Pomeroy Elementary School	Public
Scott Lane Elementary School	Public
Cabrillo Elementary School	Public
Bowers Elementary School	Public
Briarwood Elementary School	Public
New Valley Continuation High	Public
Washington Elementary	Public
Saint Lawrence Elementary School	Private
Cedarwood Sudbury School	Private
Jubilee Academy	Private
St Clare's Catholic School	Private
Santa Clara University	Private

Transit Access

Figure 4-9 shows transit access surrounding the corridor. El Camino Real is one of the main thoroughfares traversing the City of Santa Clara and is well-positioned near three major interstates and several Caltrain stations, with a VTA light-rail line running parallel to the corridor 2-3 miles to the north. The Plan Area is also near Downtown San Jose and the Diridon Amtrak Station. In addition, VTA's BART Silicon Valley Extension (service to begin 2026) will include a 5-mile-long subway tunnel through downtown San Jose, which will extend the BART system from the planned Berryessa Extension terminus for approximately six miles, ending at Santa Clara. The Santa Clara station, which will be located adjacent to the Santa Clara Caltrain Station and Santa Clara University, will provide the regional link between BART and Caltrain.

The Plan Area is served by several VTA bus lines:

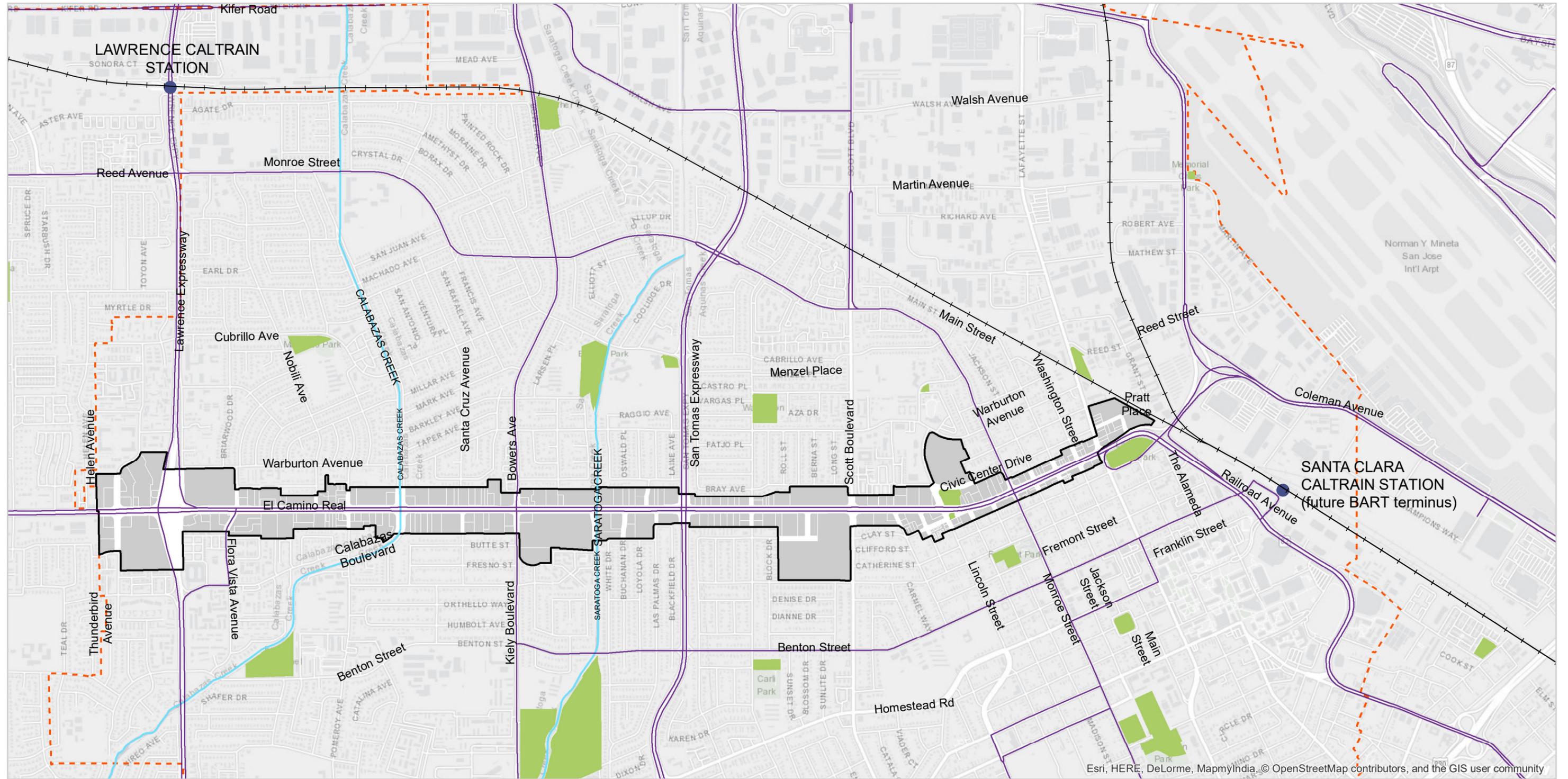
- 22 – a local service running along El Camino

- Rapid 522 – a frequent, limited stop service that runs along El Camino from Palo Alto to East San Jose
- 57 and 58 – local bus lines that run along Bowers Ave and cross El Camino
- 328 – a limited stop service along the Lawrence Expressway
- 330 – a limited stop service that runs along San Tomas Expressway and crosses El Camino
- 32 – a local service that runs from Mountain View’s San Antonio Shopping Center to Santa Clara Transit Center along Monroe Street
- 60 – a local service from Winchester Transit Center to Great America along Monroe Street and El Camino
- 81 – a local service from Moffett Field/Ames Center to San Jose State University that runs along Benton Avenue and stops at Downtown Santa Clara and Santa Clara Transit Center

VTA is currently studying design options for bus rapid transit (BRT) and other express bus service along El Camino Real. The project could include mixed-flow lanes (lanes for all vehicular travel) and could include dedicated lanes (lanes for exclusive use of BRT and emergency vehicles), with at-grade BRT stops along El Camino. In addition, the Plan Area is well-located between several rail stations – Lawrence Caltrain Station about 1.5 miles north of El Camino and the Lawrence Expressway, and the Santa Clara Transit Center (Caltrain, future BRT) station a half mile southeast of the eastern end of the corridor.

See the accompanying Transportation Profile memo for a more detailed discussion of transit and transportation conditions along the corridor. The continued improvement and integration of transit and multi-modal transportation options will be an important priority for the planning effort along El Camino Real.

Figure 4-9 Transit Access



Esri, HERE, DeLorme, MapmyIndia, © OpenStreetMap contributors, and the GIS user community

Legend

- City Boundary
- Plan Boundary
- Plan Parcels
- Creeks
- Parks
- Transit Lines
- Caltrain Stations Bus
- +—+—+—+— Caltrain Tracks

0 0.125 0.25 0.5 Miles

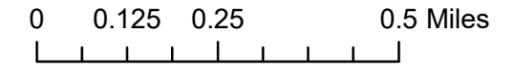
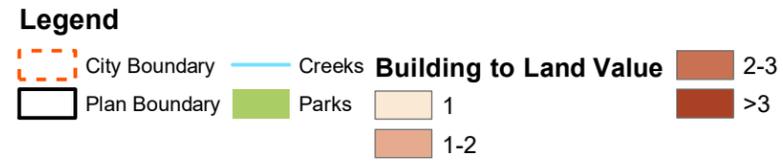
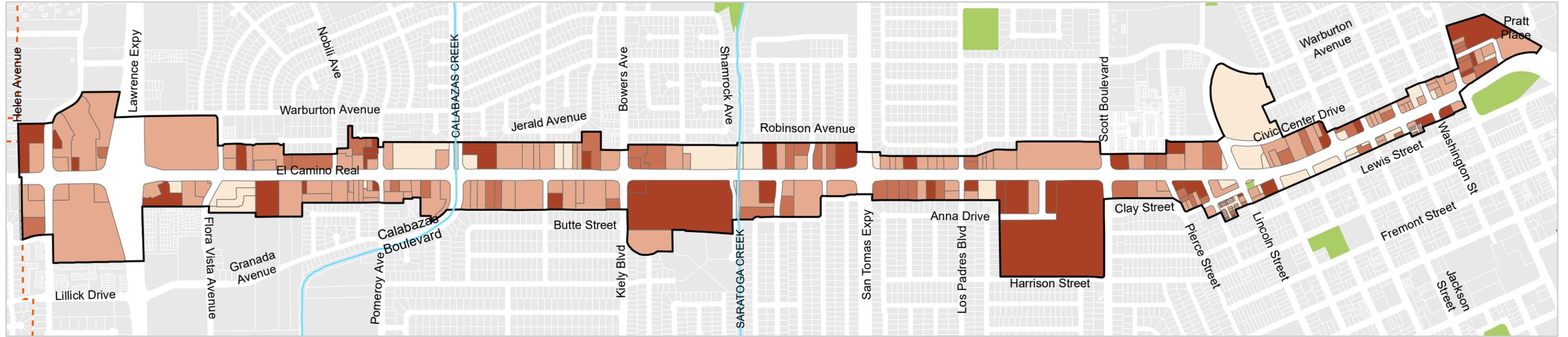


Building to Land Value

A number of factors can help understand a parcel's potential for change/redevelopment in the future. As discussed previously one of these factors is parcel size. Another measure is building to land value, which identifies the ratio of the value of building improvements to the value of the underlying land to determine whether the site is being used to its full potential. This is calculated by summing up the land value and building value, and then dividing by the land value. In some cases, a low building to land value could indicate that a parcel is economically feasible for redevelopment, with opportunity to recover development costs through increased property value.

Figure 4-10 characterizes parcels along El Camino Real by building to land value ratio. Properties where the building to land value is 1-2 represent parcels that are either vacant or where the building value is low compared to the land value. Some of these parcels have been redeveloped in recent years, and are now the site of residential developments such as Alexis Condominium Complex, Presidio El Camino, and Tuscany Towers Apartments. Others, such as Civic Center, may have a low building to land value because they provide a unique public facility like open space or other community amenities. However, other parcels with a low building to land value ratio could have economic potential for redevelopment, particularly the large parcels surrounding the Lawrence Expressway, many of the smaller mid block auto-oriented commercial properties, and the El Camino Center shopping strip.

Figure 4-10 Building to Land Value Ratio



Urban Form and Streetscape

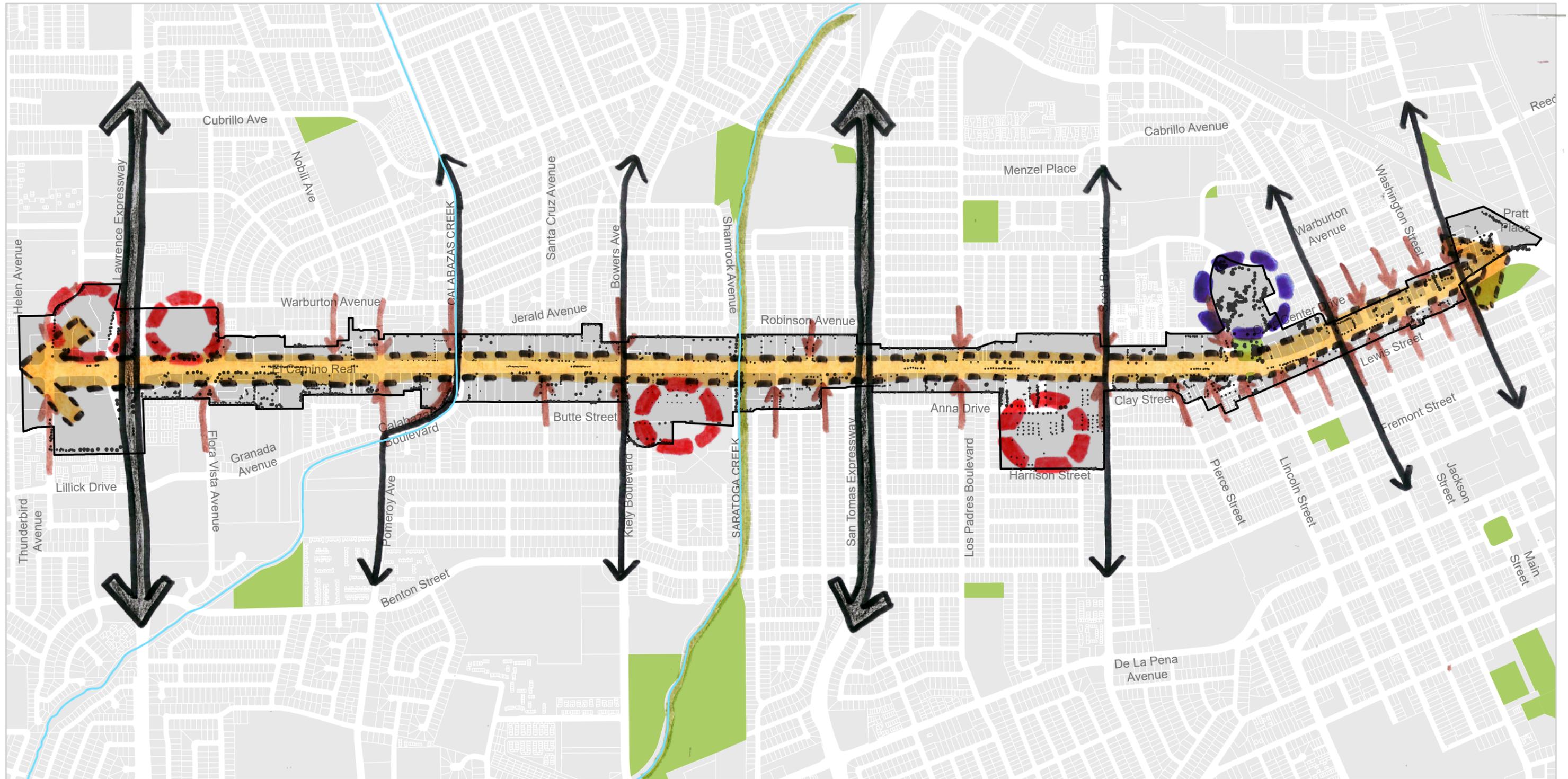
Urban Form

Figure 4-11 suggests a community design framework for understanding the existing El Camino Real context. Key physical features and activities will continue to provide the background and foundation for the corridor, and are important to understand, leverage, and adjust as the corridor evolves in the future. Key elements illustrated in Figure 4-11 include:

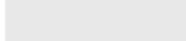
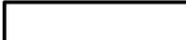
- Edges/barriers - Edges are linear elements that serve as a visual or physical boundary, barrier, or transition between districts and that define the boundaries of a place. Elements such as freeways, flood channels, natural features and landforms may be considered edges.
- Path/corridors – Paths or corridors are passages that people use to get from one place to another. A path or corridor provides for vehicular and/or pedestrian movement within the community.
- Activity nodes - focal points in a city where people and activities are concentrated

El Camino Real itself is the major street or corridor running through the Plan Area. It is intersected by two key edges – the Lawrence Expressway and the San Tomas Expressway, both large multi-lane roadways that provide vehicle connections but create significant physical barriers, particularly to pedestrian movement along El Camino. Calabazas Creek and Saratoga Creek provide a natural edge and potential amenity intersecting the corridor in two places. A number of north-south corridors or pathways also cross El Camino Real at regular intervals. These include major arterials such as Calabazas Boulevard, Bowers Avenue/Kiely Boulevard, and Scott Boulevard, as well as smaller streets that provide connections to surrounding neighborhoods. The western portion of the Plan Area is less walkable, with longer blocks and fewer cross streets, whereas the area east of Scott Boulevard features numerous neighborhood connections at shorter intervals. Lastly, there are three key activity nodes along the El Camino Real. The Moonlight Center and Santa Clara Town Center are retail nodes that attract both surrounding residents and regional patrons with their variety of retail and service-oriented amenities and activities. The Santa Clara Town Center includes a plaza that serves as a social gathering space for the community. The Santa Clara Civic Center is a concentrated node for civic activities, with Civic Center Park, City Hall, and the convention center. These existing framework elements should be considered as an important parameter as land use, urban design, transportation, and infrastructure alternatives are explored during the planning process.

Figure 4-11 Existing Urban Framework



Legend

- | | | | | | | | |
|--|---------------|---|--------------------|---|---------------------------------------|---|-------------|
|  | Parcels |  | Corridor - ECR |  | Neighborhood (Pedestrian) Connections |  | Civic Node |
|  | Plan Boundary |  | Espressways/ Edges |  | Creeks |  | Retail Node |
|  | Plan Parcels |  | Major Arterials |  | Riparian Corridor | | |
|  | Parks | | | | | | |



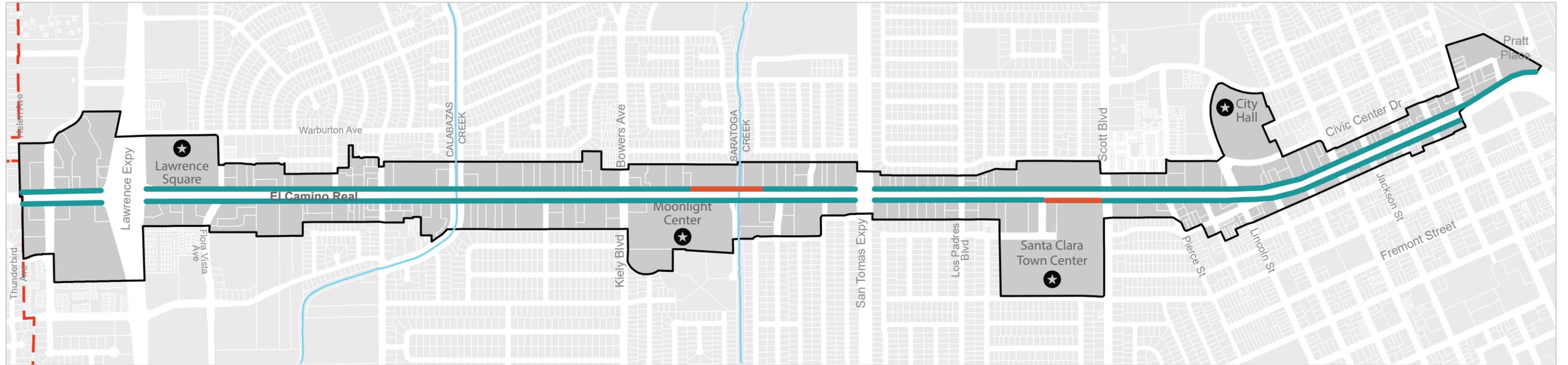
Streetscape

The streetscape plays an important role in the livability, aesthetic quality, and character of neighborhoods and commercial corridors. They affect how people get around and the experiences they have while doing it. The streetscape may include a variety of elements, such as vehicle travel and parking lanes, bike lanes, sidewalks, street furniture, bus stops, utility poles, trees, accent plantings, and signage.

The current streetscape environment along El Camino Real reflects its character as a wide, auto-oriented arterial. The street right of way is 6 lanes wide, with a median, additional turning lanes, and on-street parking in many places. The sidewalk along the majority of the corridor is narrow and lacks street trees and furnishings. There are generally three sidewalk conditions or arrangements found along El Camino, described further below. Older sidewalk sections lack street trees and are 6 to 9 feet wide, which leaves only a few feet for pedestrian movement in areas where bus stops, streetlights, utilities, and other furnishings encroach into the pedestrian zone. There are inconsistencies in the location of the furnishing zone, which is sometimes located towards the back of the sidewalk and in some instances towards the front of the sidewalk, as seen in images on the following pages. Two sections along El Camino (in front of Villas on the Boulevard and Santa Clara Town Center) have been updated with new, wider sidewalks that incorporate a planting strip with street trees along the curb line that help buffer pedestrians from vehicular lanes and create a more inviting pedestrian environment (see Figure 4-12).

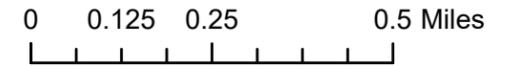
In many cases, these different sidewalk conditions are not aligned, and can create a disjointed pedestrian experience when they transition from one to the other. The El Camino Real planning process should provide more clarity and guidance as to the desired sidewalk and streetscape orientation along the corridor, including the strategies for integrating new improvements with older existing facilities.

Figure 4-12 Sidewalk Conditions



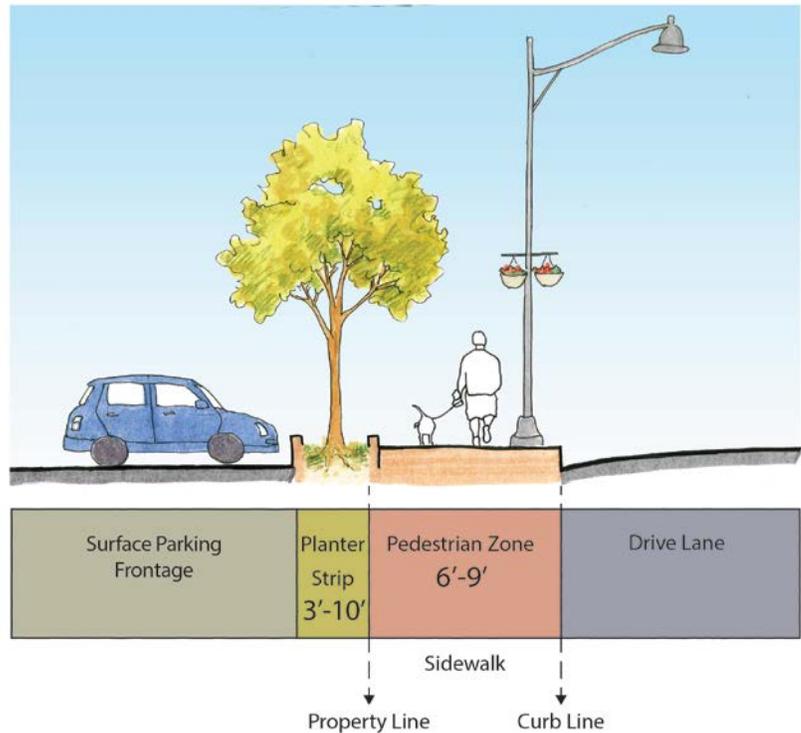
Legend

- City Boundary
- Plan Parcels
- Parcels
- Plan Boundary
- Creeks
- ★ Landmarks
- Older Sidewalk Condition 1 or 2
- Newer Sidewalk Condition Fronting Recent Development



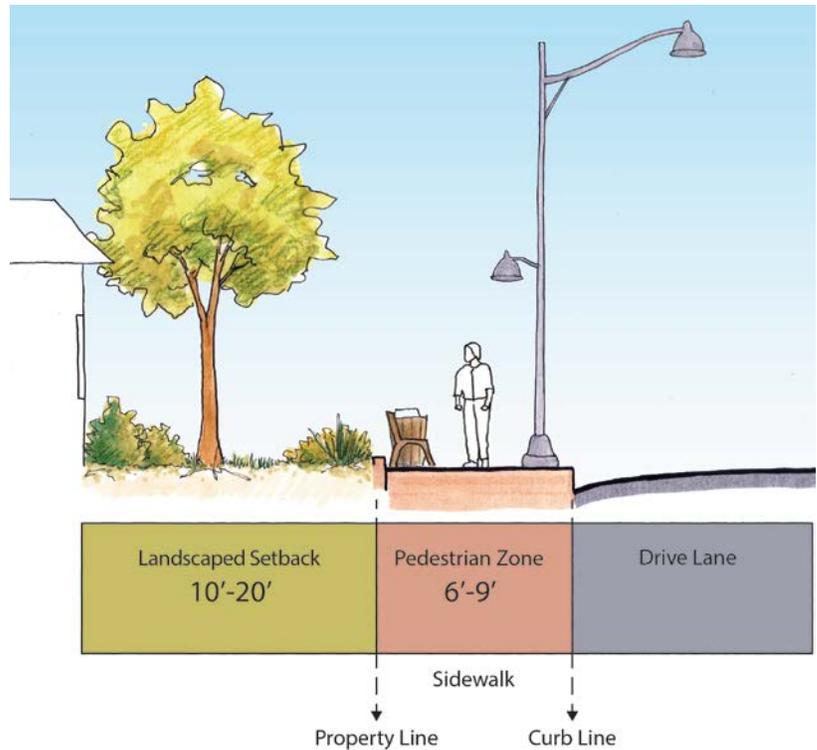
Older Sidewalk Condition #1 – Parking Frontage:

- Occurs along roughly half of ECR parcels, and is more common in the western portion of the Plan Area
- 6'-9' wide sidewalks, with a pedestrian clearway of 3'-6'
- Auto-oriented street lights located along the curb, occasionally with hanging flower baskets or a streetlamp attached at pedestrian-level
- Surface parking frontage with a 3'-10' planter strip located between the parking lot and sidewalk
- No street trees along the sidewalk
- Limited street furniture – benches and waste receptacles located along the inside edge of the sidewalk near several of the bus stops



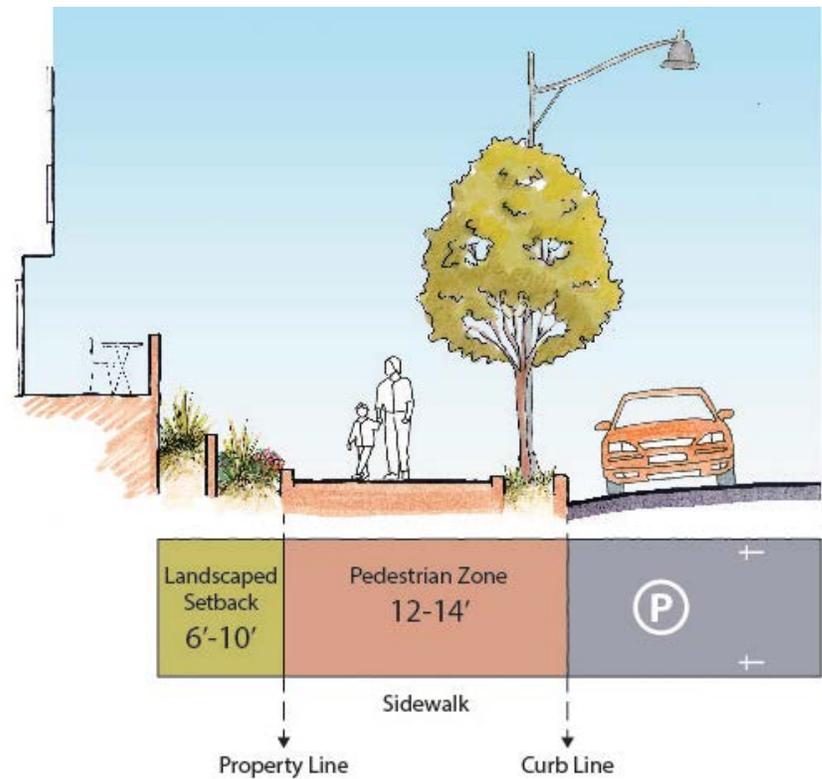
Older Sidewalk Condition #2 – Landscaped Setback:

- Occurs along roughly half of ECR parcels, and is more common in the western portion of the Plan Area
- 6'-9' wide sidewalks, with a pedestrian clearway of 3'-6'
- Auto-oriented street lights located along the curb, occasionally with hanging flower baskets or a streetlamp attached at pedestrian-level
- 10'-20' landscaped setback along the building frontage
- No street trees along the sidewalk
- Limited street furniture – benches and waste receptacles located along the inside edge of the sidewalk near several of the bus stops



Sidewalk Condition Fronting Recent Development:

- Occurs in three places – in front of Santa Clara Town Center, Villas on the Boulevard, and Alexis Apartments
- 12'-14' wide sidewalks, with a pedestrian clearway at least 9' wide
- 3' planting strip along the curb with landscaping and street trees
- 6'-10' landscaped setback along the building frontage
- Auto-oriented street lights
- Lack of street furniture such as benches, waste receptacles, and bike racks

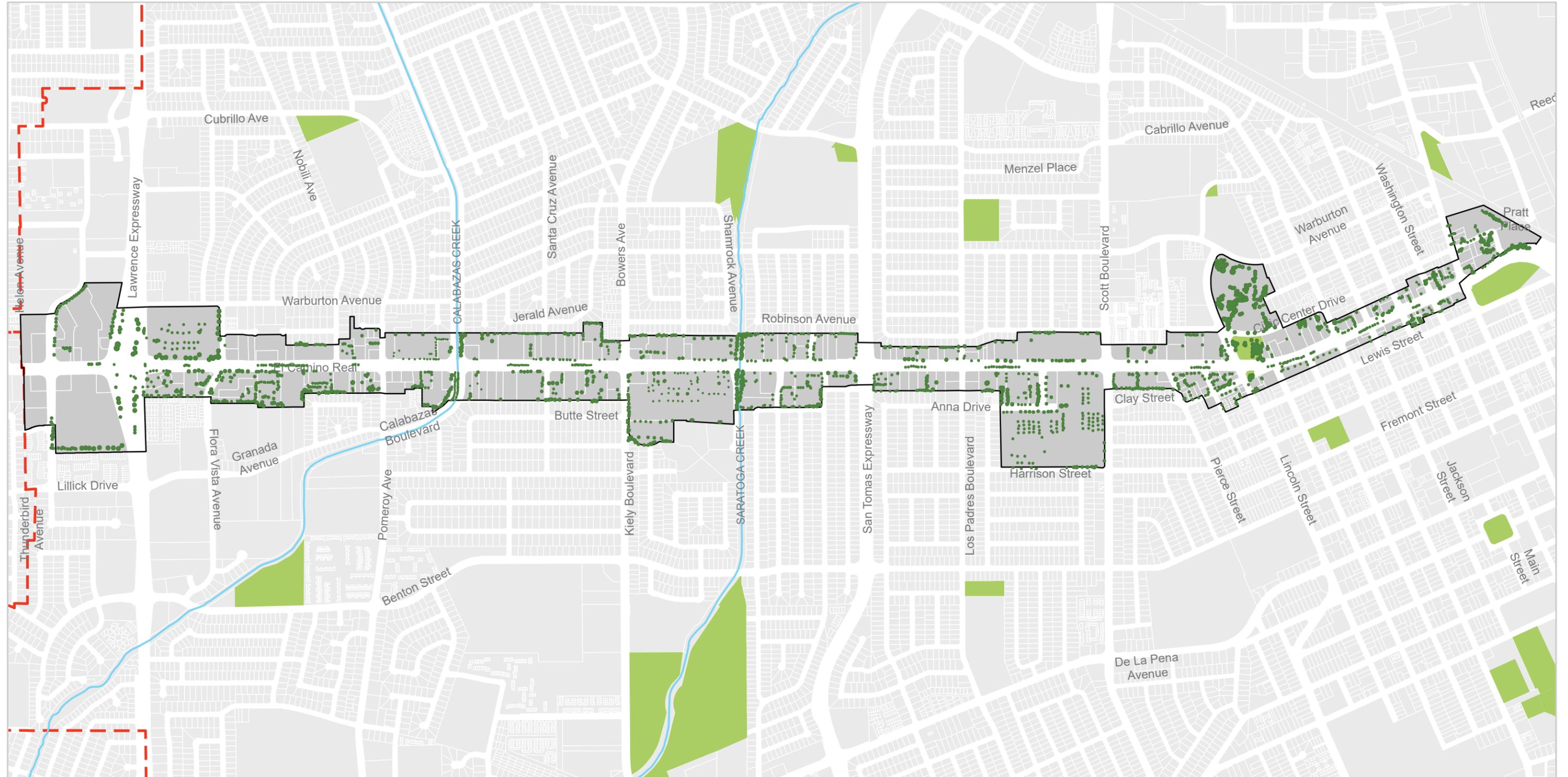


Tree Cover

Trees, plantings, and other vegetation form an important part of the urban environment. They can provide an inviting, attractive, and protected streetscape, lower urban air temperatures, reduce stormwater runoff, calm traffic, improve public health, provide wildlife habitat and absorb greenhouse gases. Most of El Camino Real has little to no tree cover or landscaping, which contributes to an uninviting pedestrian environment. Concentrations of tree cover can be found along Saratoga and Calabazas Creeks and in Civic Center and Civic Center Park, as shown in Figure 4-13. Narrow medians with small trees and shrubs occur at regular intervals along El Camino. However, the majority of sidewalks, in some cases entire blocks, lack street trees. In most cases, trees along the corridor are not located on the sidewalk but instead in a landscaped setback outside of the public right of way. This may be due to the existence of utilities that run directly below the sidewalk instead of in the street right of way. However, several new developments that have installed wider sidewalks with planting strips provide examples of how the streetscape could be improved with new street trees along the entire corridor.

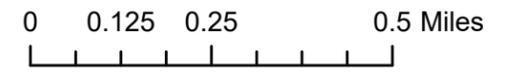
The accompanying Infrastructure Profile memo provides more detail on existing utility types and locations along El Camino Real, which will be an important consideration for the potential of new street trees and landscaping along the corridor.

Figure 4-13 Tree Cover



Legend

- City Boundary
- Plan Parcels
- Tree Cover
- Parcels
- Creeks
- Plan Boundary
- Parks



Planned Developments

There are currently 11 development projects along El Camino Real that have been recently built, are under construction, approved, or pending. Figure 4-14 shows where these projects are located along the corridor and Table 4-3 provides details on each project. In total, these planned developments could result in 409,495 square feet of new commercial space and 2,243 residential units. An understanding of these potential or recent development projects is important when considering possible future scenarios for the Plan Area. A significant number of the large potential development sites along the corridor are already the subject of approved or pending development applications, including Gateway Santa Clara (formerly the Kohls site) and a proposed mixed-use development on the current Lawrence Square shopping center site.

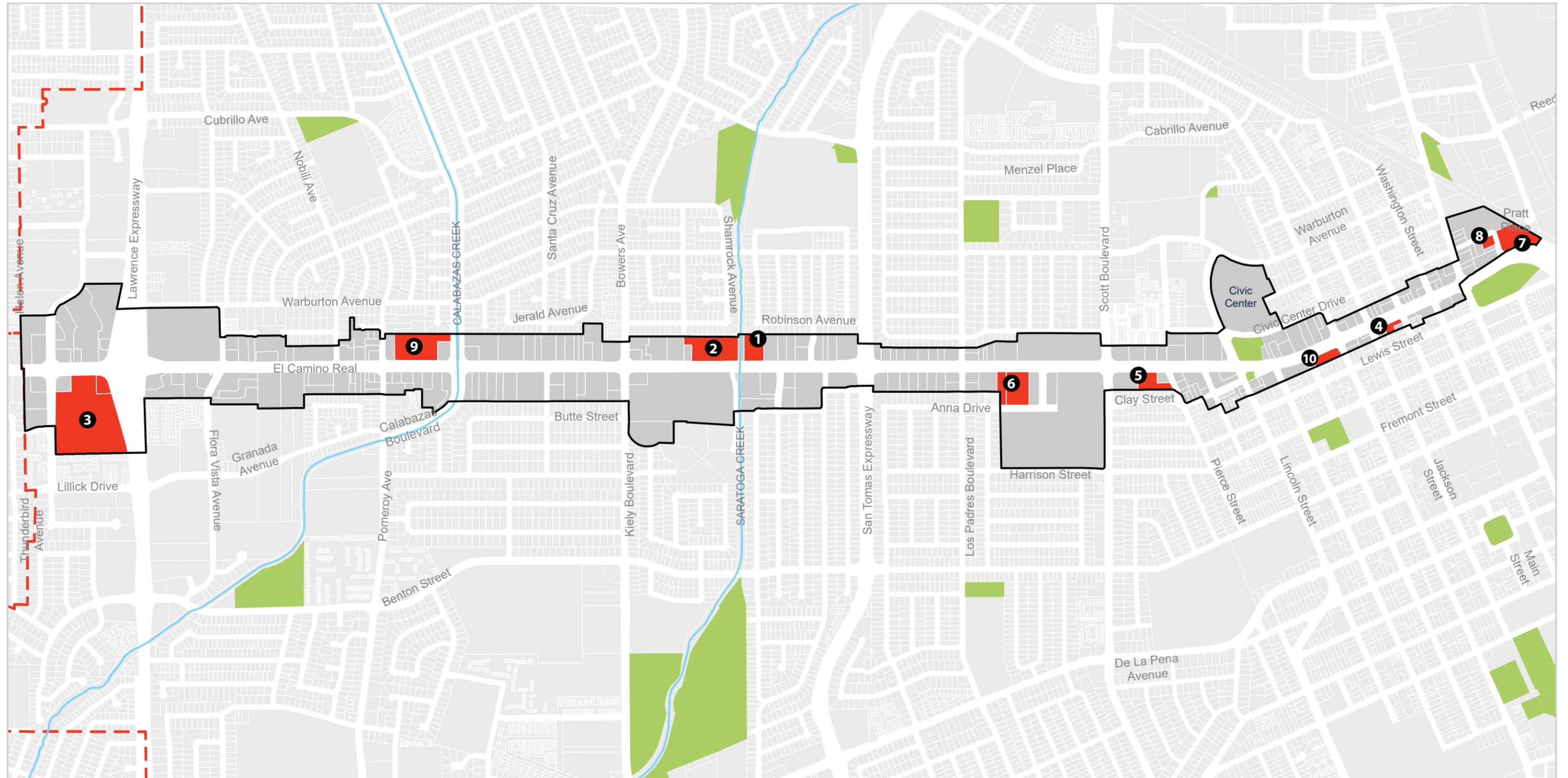
Table 4-3: Planned Developments

#	Address	Status	New Commercial/ Retail (SF)	New Residential Units	Description	Submittal/ Approval Date
1	2585 El Camino Real	Built	0	60	60 condo for sale units	8/27/2013
2	2611, 2621, 2635, 2645, 2655 El Camino Real	Built	0	183	Development of a multi-family residential project (183 units) on 5 parcels including former Russels Furniture property and El Real Nursery site	9/15/2013
3	3700 El Camino Real	Approved (Under Construction)	87,000	476	Gateway Santa Clara (formerly Kohls Site); Mixed use development- Redevelopment of entire site 87K retail/commercial and 476 housing units (apartments)	2/1/2015
4	1480 Main St	Built	1000	12	Camino Main Place – mixed-use project with 12 residential units and 1000 sf of retail	4/21/2015
5	1610 El Camino Real	Built	Unknown	0	Kettle’s – new 36 seat restaurant	5/8/2015
6	2232 El Camino Real	Approved	10,000	151	Rezoning a 2.74 acre project site to PD for a four-story mixed-use project with 151 senior apartment homes, 17,909 square foot of commercial space, and 277 parking spaces provided in a wrapped parking structure and parking lot.	6/30/2017

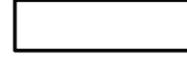
#	Address	Status	New Commercial/ Retail (SF)	New Residential Units	Description	Submittal/ Approval Date
7	1525 Alvio St	Approved (Under Construction)	0	40	40 unit townhouse project- 3 stories	Unknown
8	820 Civic Center Drive	Built	0	3	Rezone from ML to PD for preservation of an existing historic house and construction of a 2-bdrm rental unit and 2 additional single- family homes	6/23/2015
9	3329 El Camino Real	Built	0	133	Rezone from CT to PD to build 133 market rate apartments	Unknown
10	1368 El Camino (application under 1460 Monroe St)	Approved (Under Construction)	6,726	28	Rezone from CT to PD to construct a 4-story mixed use development with 6,276 sf of ground floor retail/office and 28 residential units above	3/18/2014
Total			409,495	2,243		

Source: City of Santa Clara

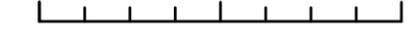
Figure 4-14 Recent & Planned Developments



Legend

-  City Boundary
 -  Plan Parcels
 -  Recently Constructed or Planned Development
 -  Parcels
 -  Creeks
 -  Parks
 -  Plan Boundary
- * See Planned Developments table for additional details

0 0.125 0.25 0.5 Miles



 5 minute walk



UTILITIES & INFRASTRUCTURE

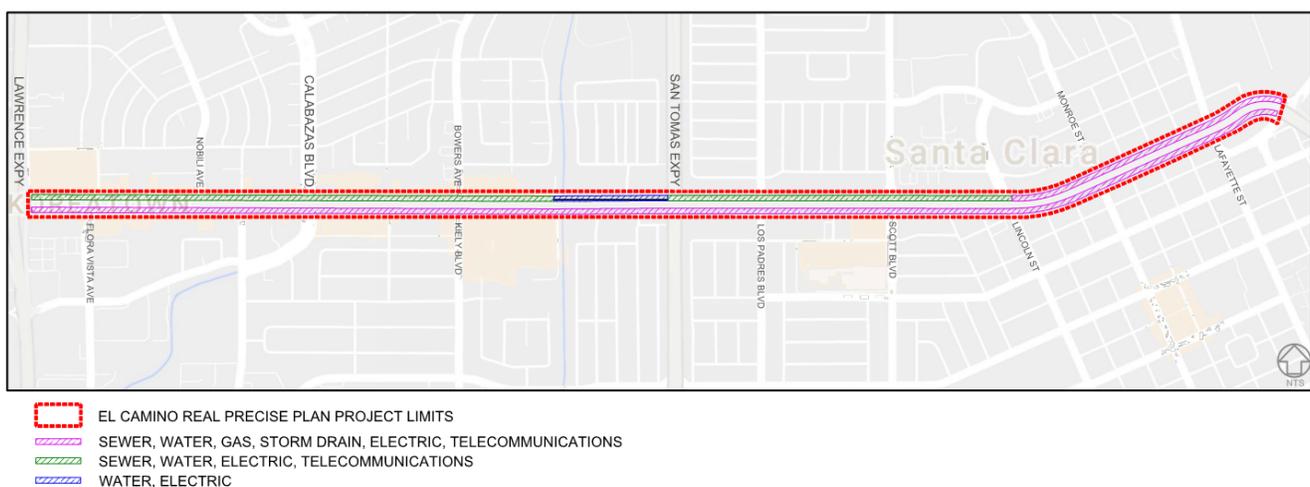
Overview

There are three main existing entities that should be taken into consideration when developing the El Camino Real Specific Plan: existing utilities, Right of Way, and flood protection. Given the layout of the existing utilities, potential constraints are primarily within both sidewalks and the eastbound roadway. The gravity flow utilities, sanitary sewers and storm drains, range in depth between 4-feet to 11-feet. The abundance of utilities within the sidewalks limits potential landscape, tree, and rain garden improvements that will require deep excavation. Additionally, sections of the Plan Area are located within the one-percent annual flood zone that are designated to require flood insurance. Lastly, potential limitations of sidewalk expansion are due to the Caltrans Right of Way locations. Caltrans Right of Way spans across El Camino Real from lip of gutter to lip of gutter, complicating sidewalk widening and bulb-outs with Caltrans permitting and coordination.

Existing Utilities

Within the El Camino Real Specific Plan Area lies a variety of underground utilities. Sewer mains and electrical lines are located in both sidewalks. Storm drainage mains run along the eastbound sidewalk and water mains run along the westbound sidewalk. The eastbound roadway contains storm drainage mains, water mains, and a high pressure gas line. Telecommunication lines run along the westbound roadway then traverse to the eastbound roadway at Jefferson Street. **Figure 1** illustrates the types of utilities located on each side of El Camino Real.

Figure 1 Existing Utilities



Existing utilities along Plan Area

Stormwater

The City of Santa Clara collects and maintains a storm drain system throughout the entire length of the Plan Area. The City's database indicates the presence of lines throughout both the eastbound sidewalk and eastbound roadway. The storm drain lines located under the eastbound sidewalk range from 12-inches to 36-inches from Lawrence Expressway to Jefferson Street. East of Jefferson Street, the storm drain lines increase to 42-inches under the eastbound sidewalk. Between the cross streets of Bowe Avenue and McCormick Drive a 24-inch line runs in the eastbound roadway adjacent to the storm drain line under the sidewalk. The depth of all storm drain lines range from approximately 4-feet to 11-feet.

As part of the Santa Clara Valley Urban Runoff Pollution Prevention Program, improvements within the Plan Area that will create or replace more than 10,000-square feet of impervious surface (or 5,000 square feet for specific uses including uncovered parking lots and auto facilities) will be considered regulated projects under Provision C.3 of the California Regional Water Quality Control Board, San Francisco Bay region, Municipal Regional Stormwater NPDES Permit (MRP).

The Specific Plan will encourage efforts to comply with Provision C.3 by implementing low impact developments (LID) to reduce runoff. The goal of reducing runoff with LID is to mimic the site's predevelopment hydrology by minimizing disturbed areas and impervious cover, then infiltrate and/or biotreat the stormwater runoff. Methods of LID that the Plan Area may be able to recommend during redevelopment are rain gardens, planter and tree boxes, bioretention units, and permeable pavement. The numerous utilities located within the sidewalks along the Plan Area corridor, in addition to the Caltrans Right of Way limits, will add conflicts when placing these LID measures. Pending coordination with Caltrans, potential locations of LID measures are at proposed bulb-outs and within existing medians at low points along the corridor. The implementation of pocket parks is also a solution to minimize impervious surfaces while promoting surface infiltration. Proposed site design should mainly focus on limiting the disturbance of natural water bodies and drainage systems, conserving natural soils and vegetation, and minimizing stormwater runoff by directing hardscape such as sidewalks and roadways to the proposed LIDs.

Due to the existing Plan Area being already developed, there should be no significant capacity issues with the implementation of the Specific Plan that would require the upsizing of storm drainage mains. Pending input from the City of Santa Clara, if there are any storm drain mains that are damaged or aging, replacement of these lines during the construction process of the Specific Plan would be optimal.

Potable Water

The City of Santa Clara supplies potable water to the entire Plan Area. The majority of distribution mains within this limit range from 8-inches to 12-inches. The major water mains along the Plan Area are as follows:

- 10-inch CIP (cast-iron-pipe) under the westbound sidewalk from Lawrence Expressway to Scott Boulevard
- 12-inch DIP (ductile-iron-pipe) under the westbound sidewalk from Scott Boulevard to the end of the Specific Plan limits
- 8-inch ACP (asbestos-cement-pipe) -converts to CIP at Calabazas Creek- under the eastbound roadway from Lawrence Expressway to Scott Boulevard
- 12-inch DIP under the eastbound roadway from Scott Boulevard to the end of the Specific Plan limits

Due to the Plan Area being already developed, the implementation of the Specific Plan is unlikely to cause significant capacity issues that would require the upsizing of water mains. Pending input from the City of Santa Clara, if there are any water mains that are damaged or aging, replacement of these lines during the construction process of the Specific Plan would be optimal.

Recycled Water

The City of Santa Clara has confirmed there are no recycled water lines on El Camino Real for the extent of the Plan Area.

Waste Water

The City of Santa Clara provides sanitary sewer collection along the corridor. Sewer collection mains range from 8-inch to 12-inch VCP (vitrified clay) pipes. The sewer collection system runs along the entire length of the Plan Area under both the westbound and eastbound sidewalks with the exception of the westbound stretch from Bowers Avenue to San Tomas Boulevard. From Flora Vista Avenue to Calabazas Creek there is an additional 15-inch VCP sewer main in the westbound roadway running parallel to the main under the westbound sidewalk. The depth of all sewer lines range from 5-feet to 9-feet. Due to the Plan Area being already developed, the implementation of the Specific Plan is unlikely to cause significant capacity issues that would require the upsizing of sewer mains. Pending input from the City of Santa Clara, if there are any sewer mains that are damaged or aging, replacement of these lines during the construction process of the Specific Plan would be optimal.

Electric Facilities

Silicon Valley Power (SVP) provides electric service to the City of Santa Clara. An underground electrical system spans throughout the entire length of the Plan Area. There are electrical lines serving both secondary lines and street lights along the corridor that run on both sides of the sidewalk. Street lights run along both sides of the street in the sidewalk at a spacing of approximately 90-feet. There are no overhead electrical lines within the Plan Area, nor are there street lights located within the median.

The City is well established in sustainable planning through its utilities and public services, including SVP. Today, SVP and the City are focused on expanding the utility's sustainable resources. One of the City's main priorities is the reduction of greenhouse gases and development of sustainable renewable energy and green power resources, as outlined in the City's 2013 Climate Action Plan. Over 30 percent of the power mix for SVP is from renewable geothermal, small hydroelectric, solar and wind sources (57 percent if large hydroelectric sources are included). With implementation of the CAP, the City intends to eliminate coal power from SVP's energy portfolio and investigate large scale renewable energy options. SVP currently offers a Green Power option that allows residents and businesses in the City to purchase 100 percent clean wind and solar power, which is produced locally in California and within the City.

To encourage residential photovoltaic (PV) systems, SVP offers a Neighborhood Solar Program, matching resident and business contributions to the fund for nonprofit solar facilities in the City. Additionally, SVP provides rebates for local businesses and residents for installation of solar electric systems, and expedited solar system permitting. The City aims to install an additional 6 MW of solar, through a combination of residential and commercial installations. In addition, under the CAP the City will implement new programs to achieve a five percent reduction in community wide electricity use by 2020.

Gas Facilities

Gas service facilities within the Plan Area are owned and operated by PG&E. Along the entire eastbound section of the Plan Area, a high pressure distribution main runs in the roadway.

Telecommunications

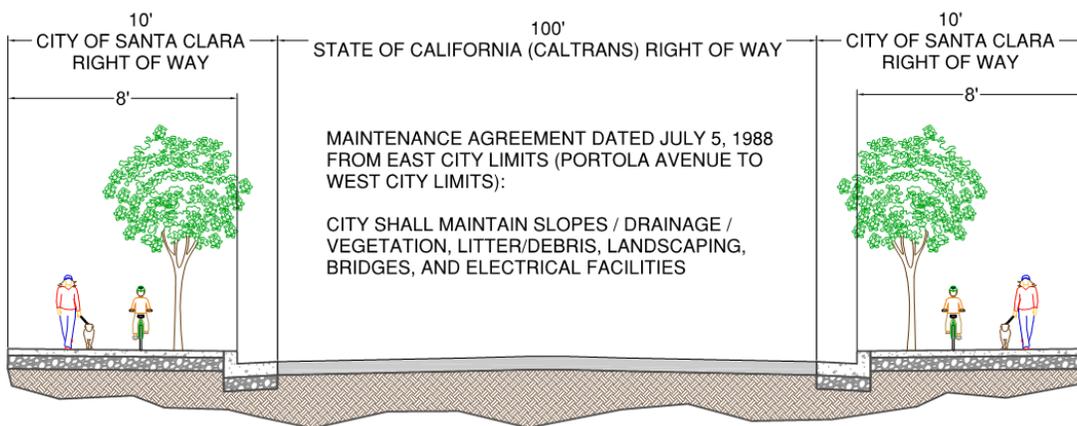
Telecommunications conduit extend along the Plan Area from Lawrence Expressway to Main Street. Telecommunications conduit are located under the westbound roadway until Jefferson Street where the conduit spans across the street and continues to run under the eastbound roadway. The conduit then curves up to Main Street with no lines within El Camino Real for the rest of the Plan Area.

Right of Way

Caltrans and City of Santa Clara Limits

Caltrans Right of Way spans approximately 100-feet across the street portion of El Camino Real from lip of gutter to lip of gutter. The City of Santa Clara Right of Way includes the 8-foot sidewalk and 2-foot gutter on both sides of the street from back of walk to lip of gutter. **Figure 2** illustrates the Right of Way configuration along El Camino Real. There may be potential expansion limitations of the sidewalk due to the Caltrans Right of Way location. This may limit sidewalk widening and bulb-outs without Caltrans permitting and coordination.

Figure 2 Caltrans Right of Way



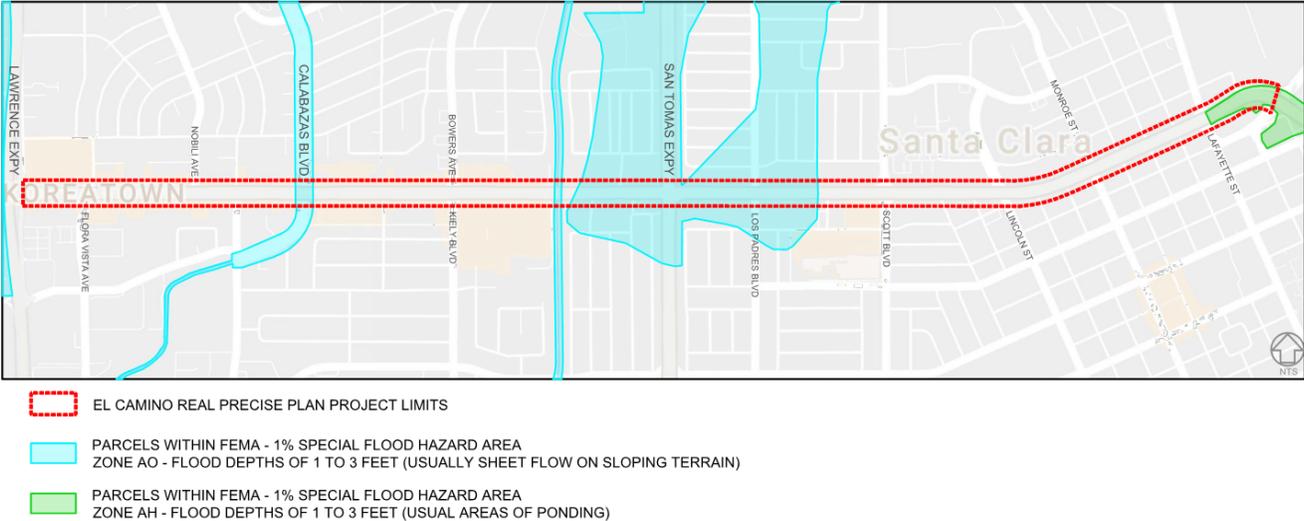
Right of Way configuration along Plan Area

Flood Protection

FEMA Flood Map

The Federal Emergency Management Agency (FEMA) produces flood maps in support of the National Flood Insurance Program (NFIP). The flood maps categorize flood hazard risks into zones. The Plan Area crosses two major creeks in Santa Clara, the Calabazas Creek and the Saratoga Creek. Consequently, these creeks cause segments of the Plan Area to fall into Zone AO and Zone AH, shown in **Figure 3**.

Figure 3 – Flood Map



FEMA floodplain map along Plan Area

Zone AO

The portions of the Plan Area affected by the two major creeks are near Lawrence Expressway, Calabazas Boulevard, Bowe Avenue, and from Buchanan Drive to Los Padre Boulevard. These areas lie within the one-percent FEMA special flood hazard Zone AO. Zone AO corresponds to the one-percent annual chance floodplains where flood depths are one to three-feet and usually sloping sheet flow.

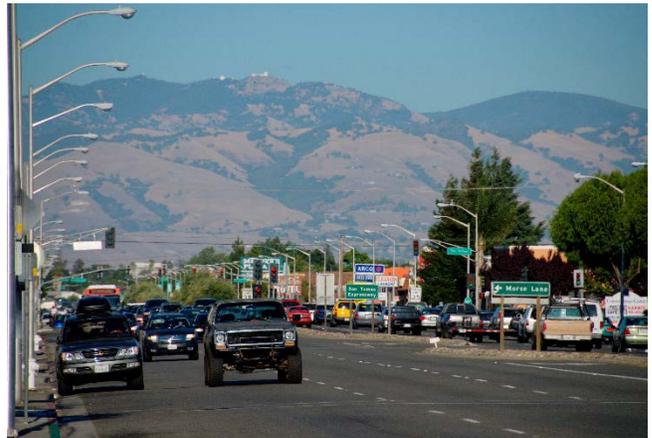
Zone AH

The far East portion of the Plan Area near Santa Clara University is close to the FEMA special flood hazard Zone AH. Zone AH corresponds to the one-percent annual chance floodplains. The flood depths are one to three-feet and are usually ponding areas.



**City of
Santa Clara**
The Center of What's Possible

EI CAMINO REAL SPECIFIC PLAN: MARKET PROFILE



A. MARKET DEMAND ANALYSIS

B. COMMERCIAL RETENTION
STRATEGY

A

MARKET DEMAND ANALYSIS

Overview

The Market Profile of the City of Santa Clara El Camino Real Specific Plan (ECRSP) Area evaluates key factors that will affect likely demand for a range of land uses in the ECRSP Area that is the subject of this profile. Accordingly, this profile reviews demographic, economic, and real estate supply trends and susceptibility to change, and projects the impact of these factors on market demand for selected land uses in the Plan Area.

Then, given the demand pressures of the current and foreseeable future of the next 15 years, KMA – in collaboration with Raimi Associates – addresses a potential commercial retention strategy.

This profile is organized into the following sections:

- ECRSP Area Market Demand Factors based on geographic setting as follows:
 - Region and County
 - City
- And then ECRSP Area Market Demand Factors for the following major land uses:
 - Residential
 - Retail
 - Office
 - Hotel.

Region, County and City Economic and Real Estate Trends

The San Francisco Bay Area is currently experiencing a period of sustained economic growth, with greater Silicon Valley and Santa Clara County in particular at the center of the boom. Specifically, since 2010, the Bay Area has consistently outperformed the nation in growth of jobs and economic output.¹

Driven by the economic expansion, the region's and Silicon Valley's populations have increased dramatically as well, contributing to Santa Clara County's population growth of about 180,000 from 2010 to 2017 (source: ESRI Business Analyst).

The City of Santa Clara has participated in the recent economic growth of the County, with the City's economic growth centered where there is available land, mostly north of Highway 101, i.e., between

¹ Source: Bay Area Council (2016) Promises & Perils of an Accelerated Economy; Bay Area Economic Profile.

Highway 101 and Highway 237. Examples of recently built or approved office developments in a campus setting which have contributed to job growth are: Santa Clara Gateway by the Irvine Co., The NVIDIA project, Sobrato's Bowers office campus, and the 8M SF – 9M SF mixed use (significant office) project by Related, next to Levi's Stadium. However, because so much of the City is already built and there are environmental constraints on unbuilt sites, housing and population increases in the City of Santa Clara have been minor compared to increases in population and housing growth in the County, i.e., ESRI Business Analyst estimates County population grew by 180,000 between 2010 to 2017, and the City's growth of approximately 11,000 only accounted for 6% of that growth.

Market Context / Major Influences on the Plan Area Development Potential

Based on the region, county and City economic and real estate trends as just summarized, it is clear that the current time and the foreseeable future are characterized by a period of robust economic activity. However, the extent to which the older and largely built out ECRSP Area will participate in that larger area's robust activity will vary by land use and by the key characteristics of the corridor. Therefore, what follows is an overview of the area's key characteristics and then an evaluation of market demand for individual land uses within the Plan Area.

El Camino Real Specific Plan Area

The Plan Area includes 19 candidate "sites" or parcel groupings (identified in Appendix 1) which the Housing Element designates as most likely to redevelop into residential uses in the up to 2023 Housing Element Planning Period (there is also one other site – site 20 – that is physically separated and has multiple ownership, and therefore this analysis focuses on the 19 sites).

As noted in the 2010-2035 General Plan Land Use Element the ECR is the City's most visible and identifiable commercial corridor. ECR is a primary east-west route and State Highway, and provides services for many of the city's residential neighborhoods. The ECRSP Area is approximately 4 miles long, with its western boundary the Santa Clara/Sunnyvale border, and its eastern boundary largely established by major railroad tracks on the east, the San Jose Airport, and the separate focus area that centers on the Santa Clara Caltrain Station and Santa Clara University.

As stated in the Housing Element, existing development along El Camino Real has, until 3-5 years ago, consisted of a mix of small scale auto oriented commercial uses, as well as mid to large scale strip mall developments. With a small number of exceptions, commercial building heights are one story, with parking located toward the ECR edge.

Recent data from ESRI Business Analyst indicates the following overview of the non-residential employment composition of the Plan Area (data rounded to nearest 10).

Non-Residential Employment Composition of the Trade Area

City of
Santa Clara

	<u>Employees</u>	<u>% Total Employment</u>	<u>Employees</u>	<u>Share</u>
Eating/Drinking	690	16%	4,510	4.0%
Food/Health/Misc. Retail	190	4%	1,380	1.2%
Regional Retail	<u>390</u>	<u>9%</u>	<u>6,680</u>	5.9%
Total Retail	1,270	29%	12,570	11.1%
Government	530	12%	2120	1.9%
Finance and Real Estate	250	6%	4,800	4.2%
Hotel & Lodging	140	3%	1,710	1.5%
Automotive Services	140	3%	1,260	1.1%
Health Legal and Education	477	11%	7,706	6.8%
Other Services ¹	<u>930</u>	<u>22%</u>	<u>31,330</u>	27.6%
Total Services	1,690	39%	42,010	37.0%
All other ²	<u>580</u>	<u>13%</u>	<u>52,090</u>	<u>45.9%</u>
	4,320	100%	113,590	100.0%

1. Includes motion pictures and amusements, health services, legal services, educational institutions, libraries and others.

2. Includes agriculture, construction, manufacturing, transportation, utility.

Source: ESRI Business Analysis, 2017

Review of the statistical data reinforces the Housing Element’s overview that emphasizes the importance of eating, drinking, food, health, legal and education, miscellaneous retail and services as major non-residential land uses and contributors to employment, but also indicates significance of government (City Hall), hotel and automotive services. A final key observation is that as of 3-5 years ago, residential was a minor land use along the corridor.

However, around 2014-2015 (time of the Housing Element), significant change began to occur with development of medium and high density residential in the ECR (also there occurred redevelopment of the 283,000 SF Santa Clara Town Center with Target and Sprouts as major tenants). Over 700 new residential dwelling units in 3 projects have recently been built or are under construction – mostly

rental but one project is for-sale condominium units. In addition, in 6 more projects nearly 1,500 units have either been approved or are pending approval, which – if all are built – with the 700 already built would add 2,200 dwelling units to the ECRSP AREA. (A list of pipeline projects can be found in Appendix 2.) The recently approved/pending projects feature mostly rental units, with a limited number of for-sale condominiums and one senior housing project. Four of the six projects are proposed to include commercial or retail – with one project proposing about 80,000-90,000 SF of commercial retail and a 306-room hotel in a mixed use configuration.

ECRSP Area Development Potential

The preceding summarized the recent and current state of development in the ECRSP Area. The following addresses projected opportunities and constraints looking forward over the next 15 years.

Residential Development Opportunity

ECRSP Area residential development opportunity will be governed by four key factors:

1. Market demand,
2. Parcel size and configuration impact on ability to assemble parcels,
3. City land use policy and affordable housing context,
4. Financial feasibility.

The following addresses each of these factors, taking into account the latest in actual residential development activity:

Market Demand

As discussed earlier in this profile and generally accepted, the Bay Area economy is booming and the center of the boom are the cities of Silicon Valley, including Santa Clara. This phenomenon is happening at a time when land in Silicon Valley is already scarce and increasingly expensive. The results are residential vacancy level estimates by ESRI in their 2017 Business Analyst Report of well under 5% (3.1% for both the County of Santa Clara and the City of Santa Clara.) Such low vacancies combined with continued employment growth are then continuing to push up the cost of both for-sale and rental housing (discussed also in the financial feasibility discussion that follows shortly).

Parcel size and configuration

As to parcel size and configuration, a 2015 study by the EPS consulting firm for MTC of the ECRSP Area notes: “Parcel size and configuration is the major constraint in this [Area]. Parcel sizes are small, shallow, and abut single family neighborhoods. This constraint is likely to increase over [time] as the larger and more developable sites are redeveloped.”

City Land Policy and Affordable Housing Context

Current City policy is summarized as follows. Per the City’s Housing Element, the 2010-2035 General Plan vision for El Camino Real is to transform the Plan Area from a series of automobile-oriented strip-malls to a tree-lined, pedestrian- and transit-oriented corridor with a mix of residential and retail uses. Larger properties are typically designated as Regional Mixed Use and located at key intersections, with smaller mid-block properties designated Community Mixed Use. The Regional Mixed Use classification

is intended to promote high-intensity, mixed use development along major transportation corridors in the City permitting all types of retail, local serving offices, hotel, and service uses, except for auto-oriented uses, to meet local and regional needs. The Regional Mixed Use classification requires a minimum residential development of 37 to 50 units per gross acre. Similarly, the Community Mixed Use classification is intended to encourage a mix of residential and commercial uses along major streets. Retail, commercial and neighborhood office uses are allowed at a minimum FAR of 0.10, in conjunction with residential development between 20 and 36 units per acre. For both designations, parking is encouraged to be behind buildings, below-grade or in structures, to ensure that active uses face public streets.

The Affordable Housing context is that the city’s Inclusionary Housing Policy was established in 1992 and is described in the 2010-2035 General Plan. Current policy requires new developments of for-sale housing of 10 or more units to provide at least 10% of units at below market rates for moderate income households. The City has not historically charged an in-lieu fee for residential development. However, recently an Affordable Housing Ordinance and Resolution was passed that would enact significant changes. The fees outlined in the resolution are attached in Appendix 10.

The El Camino Real Specific Plan Area allows and encourages densities that are appropriate to accommodate the City’s 2014-2022 Regional Housing Needs Assessment (RHNA) allocation. Assuming a development capacity of 50 percent for mixed use sites and a maximum permitted density of 50 units per acre for sites classified as Regional Mixed Use and 36 units per acre for sites classified as Community Mixed Use, consistent with the General Plan and Housing Element, a total of 2,200 (rounded) units could be accommodated in the ECRSP Area’s 19 sites (as illustrated in Appendix 3). The Housing Element calls for distribution of city-wide units at the affordability levels outlined in the table below. However, this distribution may vary for the ECRSP focus area.

City-wide Regional Housing Needs Assessment, 2014-2022

City of Santa Clara		
Income Group	Units Assigned	% of Total
Extremely Low	525	13%
Very Low	525	13%
Low	695	17%
Moderate	755	18%
Above Moderate	1,593	39%
Total	4,093	100%

Financial Feasibility

With respect to an initial testing of financial feasibility, a recent gathering of the San Francisco Urban Land Institute Residential Council asserted the following: “Construction costs have increased by 2x in the past 5 years.” When that happens, and current rents are already high by previous standards, there will be pressure to reduce land prices; but even if that occurs, likelihood for financially feasible projects is reduced, with the further likelihood of projects being aborted or postponed. As noted earlier in this document, while there is little residential in the ECRSP Area today except for a small number of recently built or under construction market rate projects, there are a number of residential alone or residential in mixed use projects in the pipeline. In the near term, given today’s economics, we may see these pipeline projects at least delayed. In the longer term of the 15 year “look” of this analysis, market pressures will work in favor of at least a good percentage of the pipeline projects going forward.

Actual Development Activity and Contribution to Population Growth

Recent and current development activity is presented in Appendix 2A. As noted, recently built and approved residential in the ECR are adding 700 dwelling units and another 1,500 are in the pipeline for a total of 2,200 DUs. That also, by coincidence, is current policy capacity of the ECR per the Housing Element and zoning. Therefore, if all units in the pipeline are in fact built, and – if current policy remains “as is” – residential demand beyond the 2,200 unit capacity would need to be accommodated elsewhere, so a significant policy question is raised. The policy question is whether to accommodate more than 2,200 new dwelling units in the ECR by either increasing allowable densities or increasing number of eligible and susceptible to residential change parcels.

A final comment is to note that population growth caused by new development is likely to be a minor factor both in City policy and in impacting retail/commercial sales opportunity of the ECR. At 2,200 dwelling units, and assuming average occupancy of say 1.5 persons per unit, 3,300 people would be added. Given that the City’s current population is estimated at 127,000 (rounded) and the ECR trade area population is estimated at 145,000 (rounded), and as will be reviewed in the discussion of retail development opportunities, a 3,300 person addition would be less than 3% factor – worth noting but not a factor of significance in projecting sales potential of the ECRSP Area.

Retail Market Opportunities/Constraints

In locations that are largely built up, such as the ECR in Santa Clara, the retail trade area will be heavily influenced by the size of sites available for retail and by existing patterns of retail as well as by competitive market factors. Such is the case of the trade area that can be expected for retail in the ECR Specific Plan Area (ECRSP Area).

The trade area is the geographic area from which retail, including eating and drinking facilities, can expect to generally draw 70% to 90% of its customers. Key factors for the ECR in Santa Clara are:

- Site availability, including size of available sites for new development or redevelopment
- Existing patterns of retail land-use
- Industry change, competitive and physical factors

Each of these factors is discussed next, leading to a conclusion as to the trade area that can be expected for retail in the ECRSP Area.

Factor 1, site availability and size of available sites for new development or redevelopment:

Prior to the very recent surge in demand for residential sites on the ECR, where a site was large enough for retail development there followed the traditional pattern of having one or two anchor tenants and surface parking. Because 20 acres plus was available, Santa Clara Town Center was redeveloped in 2014 with a 140,000 SF Target discount department store, a Sprout’s Farmers Market, and total square footage of 280,000 SF, but no residential. Currently, however, no site of comparable size is readily available, and the sites that might be available are being targeted for mixed-use development (MXD). The MXD generally has residential as its dominant site use. Inclusion of residential is driven both by current high level of Silicon Valley residential demand and resulting favorable economics to the site owner. Two examples of this redevelopment trend are the under-construction Gateway Santa Clara project and the proposed MXD project on Housing Element site 8. (See attached map.)

Factor 2, Existing patterns of retail land use. Another key factor in what to expect in the future is the concentration of ethnic eating/drinking/retailing in the ECRSP Area. This pattern is particularly

noticeable west of the San Tomas Expressway, and features in particular Korean and Indian restaurants. As will be discussed shortly, this ethnic emphasis is a reflection of existing and changing demographics of the trade area.

Factor 3. Industry change, competition and physical factors: The most important industry change is of course the growth of online retailing. And, while online retailing growth is impacting all forms of retail (but not eating and drinking), its impact appears to be greatest on the department store, the traditional anchor tenant that could expand the size of a given trade area. Competition also limits the size of the ECR trade area as exemplified by Valley Fair and Santana Row to the southeast and the proposed Related shopping complex on the golf course next to Levi's Stadium. Other competitive factors that limit the Plan Area trade area are the physical/psychological "barriers" of the 101 (Bayshore) Freeway to the north, the dominance of automotive retailing on Stevens Creek Boulevard to the south and the presence of the San Jose Airport and the 880 Freeway to the east.

Logical Trade Area

Given the preceding considerations of site availability, existing patterns of retail land use, industry change, location of competition and physical/psychological factors, KMA sees a trade area that has significant overlap with the boundaries of the City of Santa Clara but with the following differences: the trade area does not extend north of the 101 Freeway though the City does; the trade area does not include the automobile retailing that dominates the north side of Stevens Creek Boulevard, though the City does; the trade area does extend into a small portion of the adjacent Sunnyvale. This trade area is presented in Appendix 4.

Demographics of the Trade Area

Population of the trade area is sizeable at nearly 100,000 in 2017. Incomes are also strong, with average household income estimated at \$120,000, according to ESRI Business Analyst, 2017. (See Appendix 5 for more detail.)

However, while population is sizeable, most of the City of Santa Clara is either built up or has committed to mostly non residential use. Accordingly, ABAG projects only a 20,000 person increase for the City (1.1% per year) in the next 15 years. Extrapolating from the ABAG projection, KMA believes it reasonable to estimate about three quarters of that City increase of 20,000 would occur in the ECRSP Trade Area (see Appendix 6) i.e., an increase of about or just over 15,000 people, or 1.1% per year – not insignificant, but not dramatic.

What will change dramatically is race and ethnicity of the population. While such data is not available for the trade area per se, there is sufficient overlap with City boundaries that City statistics may be used as a good indicator of changes within the trade area. Per the attached Appendix 7, one can see that white population from 2015 to 2022 is projected to decline as a percent of population from 46% to 37%, and black population is projected to decline from 4% of total population to 3%.

The largest projected increase is in the Asian population, up by about 13,000 people and up in percent of population from 40% to 46%. Also, while all Asian races show some increase in population, the largest increase is in Asian Indians, then Chinese. Also of interest is that Korean ethnic eating/drinking square footage is quite significant in the Plan Area, while persons of Korean descent only make up 3% of the population. Further, their growth is projected to be under 1,000, so it appears unlikely that there will be significant expansion of retail oriented to this ethnic group.

Market Potential: Retail, Office, Hotel

Retail Market Demand/ Leakage

A retail demand/leakage analysis identifies the strengths and weaknesses of major retail/eating and drinking sectors within defined geographic areas by indicating where consumers are spending their money by comparing demand with estimated sales (supply).

Leakage, or where sales (supply) is less than demand potential, indicates customers are spending money outside of the trade area, or possibly not spending up to potential. Leakage represents an opportunity to increase sales by increasing attraction or it may represent an opportunity to target specific retailers to fill the retail supply gap. On the other hand, a surplus of sales (supply) over demand identifies situations where retailers are capturing sales from customers outside the designated geographic area.

Also, retail demand/ leakage relationship varies by the nature of the retail, generally in accord with three major categories. These three major categories are: comparison retail, convenience retail, and eating/drinking. Comparison retail includes furniture, home furnishing, electronics, building materials, clothing, sports and general merchandise, while convenience retail includes grocery, supermarket, liquor, health, personal care stores, and miscellaneous stores. Eating and drinking includes special food services, drinking places, restaurants and other eating places. Sales in these three categories historically have taken place in brick & mortar stores but today of course online shopping must be taken into account in projecting on site sales for both comparison and convenience stores. The following market demand/leakage analysis focuses separately on each of the three major categories of retail.

For analysis of retail demand/leakage, KMA relies on the best known retail data source, which is ESRI Business Analyst, 2017. Their methodology is explained in the footnotes to attached Appendix 8. KMA's responsibility has been to define the trade area for existing and prospective Plan Area retail as has been done earlier in this document. The demand/leakage analysis first focuses on the current situation, and then projects forward 15 years into the future.

To give perspective to retail dynamics of the ECRSP Area itself, we first look at demand/supply for the Trade Area as a whole, and the ESRI data, which is presented in Appendix 8, indicates the following conclusions:

- Overall, Trade Area retail potential and retail sales are pretty much in balance, but there is some leakage of sales (though less than 10% of demand)
- However, the import/leakage of sales are quite different for the major sales categories in the Trade Area, as follows:
 - Comparison Shopping is experiencing an import of sales; though sales exceed demand by less than 15%, it is likely that the Santa Clara Town Center project and the ECRSP Area's ethnic retailers are the reasons that sales exceed demand of the trade area by itself.
 - Convenience Shopping retail, on the other hand, is experiencing a significant leakage of sales to stores outside the Trade Area.
 - The data also indicate leakage of sales in the Eating/Drinking category, notwithstanding the presence of significant supply of eating/drinking space in the ECRSP Area.
 - Finally, it should be noted that online sales in the Trade Area in 2017 are estimated at less than 3% of all retail sales (excluding eating/drinking but of course online is projected to grow significantly looking forward.)

With the preceding perspective in mind of the retail dynamics of the Trade Area, the discussion next focuses on the retail dynamics of the ECRSP Area. First, in the absence of existing inventory data, KMA has estimated such for the three key categories (comparison, convenience and eating/drinking) by using the limited data that exists, driving the site and utilizing Google maps and photography. The resulting estimate of inventory in the ECRSP Area is summarized below, and detailed data of estimated retail sq. ft. is presented in Appendices 9A and 9B.

ECRSP Area Inventory Estimate

	In the 19 sites of the ECRSP Area	Additional in the ECRSP Area	Total in the ECRSP Area	% of Total
Comparison Retail	280,000 SF	20,000 SF	300,000 SF	33%
Convenience Retail	320,000 SF	80,000 SF	400,000 SF	44%
Eating/Drinking	140,000 SF	60,000 SF	200,000 SF	23%
Total (not including auto/ gas stations)	740,000 SF	160,000 SF	900,000 SF	100%

In summary, there is approximately 900,000 SF of retail in the ECRSP Area. A few key characteristics of that inventory are:

- The largest component of comparison retail is the 140,000 SF Target store in the Santa Clara Town Center Project; there is also a Big Lots in the Lawrence Shopping Center.
- Convenience retail is the largest component of retail in the ECRSP Area, with two of its largest tenants the Lucky supermarket in the Lawrence Shopping Center and the Sprouts Market in the Santa Clara Town Center.
- Eating and drinking is also a very important component of the retail inventory, with a significant percentage of that component in ethnic restaurants.

Given the preceding identification of the retail inventory of the ECRSP Area, next is a discussion of sales and then sales performance. Sales data as provided by ESRI is summarized as follows for the three key categories (to the nearest million).

Trade Area and ECRSP Area Sales

	Trade Area Sales	ECRSP Area Sales	Percent of Trade Area	ECRSP Area sales	Percent of ECRSP Area Total Sales
Comparison Retail	\$814M	\$64M	8%	\$64M	40%
Convenience Retail	\$314M	\$58M	18%	\$58M	36%
Eating/Drinking	\$161M	\$38M	24%	\$38M	24%
Total (rounded)	\$1,289M	\$160M	12%	\$160M	100%

The sales data from ESRI reinforces the following observations about retail in the ECRSP Area relative to trade area and relative to the inventory of space:

- Comparison retail, while the most significant generator of retail sales in the ECRSP Area, represents only a very small percentage of sales in the Trade Area;
- In all three categories of retail, the percentage of sales relative to percentage of inventory square feet is pretty consistent, i.e.,

ECRSP Area		
	Est. SF % of Total	Est. Sales % of Total
Comparison Retail	33%	40%
Convenience Retail	44%	36%
Eating/Drinking	23%	24%
Total	100%	100%

A final look at the current retail dynamic of the ECRSP Area is to review sales performance. ESRI's 2017 Retail Marketplace Profile for the ECRSP Area provides the retail sales data, and KMA provides the estimated square feet of inventory, as summarized in the following table:

ECRSP Area Retail Sales Performance per ESRI			
	ECRSP Area Sales	ECRSP Area Sq. Ft.	ECFRA estimated sales per SF
Comparison Retail	\$64M	300K	\$210
Convenience Retail	\$58M	400K	\$145
Eating/Drinking	\$38M	200K	\$190
Total	\$160M	900K	NA

The conclusion from review of the sales performance data is that in all three categories of retail, at this time, sales appear to be less than what would be expected of current, competitive retail. However, in a very recent survey sponsored by Santa Clara's Chamber of Commerce and Conventions – Visitors Bureau, which focused on a significant stretch of El Camino Real, the feedback is:

- 49% of businesses reported that business was good/improving;
- 36% reported that business has been the same/maintaining;
- Only 15% reported that business was poor/getting worse.

A full copy of the “Unite the El Camino Business Walk Survey” is included as an attachment to this document.

The conclusions of both the ESRI statistical analysis and the Chamber study reinforce the need – a major purpose of this study – to explore methods of commercial retention and improvement in retail sales.

Retail Sales Projections/Prospects for Market Based Performance Improvement

It is expected that the primary demand source for new retail space in the ECRSP Area will be added population of the Trade Area, as hotel and office expansion in the ECRSP Area is expected to be limited. Given new population will be the new primary demand source, and that increased supply of office space and hotel supply will probably be minor, per separate discussion in this profile, the following methodology has been used to estimate retail sales increase that can be expected, looking out 15 years to 2032, i.e., first we consider pertinent population growth and then how that growth is likely to convert to retail sales increase.

Earlier profile sections address likely addition of housing units and population of the City and/or ECRSP Area. One of these is the 2014 Housing Element of the City's General Plan, and the second is the

2012 ABAG/ MTC’s report: *Draft Plan Bay Area’s Strategy for a Sustainable Region*. The Housing Element document identifies three areas in the City as Focus Areas, as recipient locations for residential only and mixed use development at densities of up to 50 units per acre. The indicated potential capacity is for 6,000 units (rounded) in the three focus areas of the City (ECR is one of the three), with nearly 2,300 allocated to the ECR. At the same time, by extrapolating from City projections by ABAG/MTC, KMA assumes an additional 6,000 dus for the Trade Area but out 15 years to 2032. In light of the preceding projections, it seems reasonable to expect about 6,000 housing units to be added in the Trade Area, and at a population per housing unit of say 2.6, that would add about 15,000 people to the Trade Area. Since the current Trade Area population is just under 100,000, addition of 15,000 more would represent an increase of just over 15%, or about 1.1% per year – not a large increase, but an increase.

Starting with ESRI’s current estimate of Trade Area retail sales and ECRSP Area sales, the ECRSP Area retail sales as a percentage of total Trade Area can be determined. Then, applying the estimated population growth (of roughly 15%) to retail sales, we can determine the projected retail sales for the Trade Area in 2032. KMA then estimated a small increase in ECRSP Area sales as a percentage of Trade Area sales based on the planned increase in retail supply. Using that increased percentage, the ECRSP Area retail sales for 2032 are projected as follows:

Projected ECRSP Area Retail Sales

	Current			Projected 2032		
	TA Sales	ECRSP Area Sales	ECRSP Area as a % of TA	TA Sales	ECRSP Area as a % of TA	ECRSP Area Sales
Comparison Retail	\$814M	\$64M	8%	\$936M	8%	\$75M
Convenience Retail	\$314M	\$58M	18%	\$361M	19%	\$69M
Eating/Drinking	\$161M	\$38M	24%	\$185M	26%	\$48M

The “bottom lines” of the foregoing projections for the ECRSP Area, when looking forward 15 years as well as today, are:

- Trade Area population growth is expected to be modest given its existing built up nature.
- Given that retail sales per sq. ft. in all categories today appear low in comparison to industry averages, this study’s focus on identifying a commercial retention strategy is appropriate.
- Growth in the trade area should contribute to added brick & mortar retail sales, but will continue to be offset by growing online sales (recognizing that online sales will impact comparison and convenience retail, but not eating/drinking brick & mortar).

Office Demand

In Santa Clara, office demand and supply falls into two very distinct categories: regional office (primarily tech in nature) and local office. Regional office, with major users including a host of tech firms such as Intel, Applied Materials, and Nvidia, are located in campus environments, mostly on large acreage sites with the largest concentration either in the vicinity of or north of Highway 101. Related’s huge development on the existing city golf course near the Convention Center and Levi’s Stadium will reinforce the existing location concentrations. Therefore, given the location factors and limited site size availability in the ECRSP Area, it is likely that local serving rather than regional office will continue to be the major opportunity in the ECRSP Area.

Today the local serving office supply in the ECRSP Area consists of less than 100,000 sq. ft. (although the population of the City and the Trade Area are in the 100,000 person range). Since by definition local

serving office is occupied by tenants serving local population, it follows local population growth (projected at about 20,000 for the city and 15,000 for the Trade Area) will increase by 2032 by 15% to 20%. It then also follows that the increase in local serving office supply will increase by approximately the same magnitude as population growth, i.e., about 15% to 20%. When such growth factor of 15% to 20% is applied to the existing inventory of less than 100,000 sq. ft., the conclusion is that growth in this category of use in the ECRSP Area will be minor, probably less than 20,000 sq. ft., and likely absorbed by projects in the current pipeline.

Hotel Demand

In Santa Clara, hotel supply and demand – like office – also falls into two distinct categories. The largest percentage of the approximately 3,000 hotel rooms located in the City of Santa Clara is located in the vicinity of the Convention center and north of the 101 Freeway. About 2,000 rooms are located north of 101 in six different facilities, with all facilities at least 150 rooms in size. In addition to current inventory, Related is proposing two more hotels on its development adjacent to Levi's Stadium, which location is near the corporate tenants in that same vicinity, and near the Convention Center.

By contrast, the 12 hotel/motels in the ECRSP Area are smaller in nature. Only Mariani's exceeds 100 rooms in size, and Mariani's is slated for demolition if a pipeline replacement project, primarily residential in nature, comes to fruition. The current inventory consists of about 800 rooms and is clearly focused on the business traveler, with advertised rates of under \$150 per room per night, which is a room rate limit that likely will limit financial feasibility. More importantly, that room rate limit versus the large increase in residential rents and sale prices will make it very hard for hotel development to compete with residential. Therefore, for projection purposes, KMA's opinion is that projection of new hotel supply in the ECRSP Area is likely to be limited to the 300 rooms in the current pipeline, especially given that 300 rooms alone would add nearly 40% to the current inventory.

B

COMMERCIAL RETENTION STRATEGY

Santa Clara Commercial Retention Strategy

The context of the need for a Commercial Retention Strategy in Santa Clara's ECRSP Area is as follows:

- There are numerous older eating/drinking/shopping facilities in the ECRSP Area, and the retail analysis suggests that many of these are relatively low performers on a sq. ft. basis versus today's industry standards. Nevertheless, in a recent Santa Clara Chamber of Commerce sponsored survey of businesses in a significant stretch of the ECRSP Area, 49% of businesses reported that business is good/improving, and 36% reported that business has been the same/maintaining.
- Many of these older eating/drinking/shopping facilities feature ethnic (primarily Asian) foods or merchandise and target especially the sizeable ethnic population that exists in the ECRSP Area trade area and adjacent locations. Because of the older nature of many of these ethnic oriented facilities, rents are likely to be low and in many cases insufficient to justify new construction or generate a confidence level that these existing tenants would be able to afford rents required by new construction or major upgrade costs, unless some form of subsidy is provided.

The commercial retention strategy recommendation for ECRSP should be implemented in the context of the feedback to focused interview questions posed by KMA to businesses, developers, and brokers as a supplement to the extensive survey of businesses by the Santa Clara Chamber of Commerce (attached as Appendix 11), and to the following characteristics cited in the 2013/14 "Grand Boulevard Initiative Report," which mostly are still pertinent. These are presented next, edited to be particularly relevant to the ECRSP Area in Santa Clara.

First, the responses to the Chamber and KMA indicated a range of potential helpful feedback – of which the two leading were: 1) enhance visibility to attract more customers was mentioned by 25% of the businesses, and 2) allow more signage (i.e., A-frame signs) in front of businesses to attract foot. Still other feedback included the recommendation to not insist every residential project include retail which could "overload" the market, and consider ways to achieve small commercial condominiums that could prove attractive to small merchants.

Additionally, KMA cites pertinent recommendations of the 2013/14 Grand Boulevard Initiative Report, as follows:

Evolving Role of Retail & Growth of E-Commerce

Retail has historically been a dominant land use on El Camino Real. Retailers enjoy high traffic volume, visibility, affordable rent, and convenient access. Retail on El Camino Real continues to play an important role in many communities, Santa Clara among them, by providing convenient goods and

services, generating tax revenues, supporting local entrepreneurs, and – in some circumstances – contributing to pedestrian-friendly environments.

But changes in national retail landscapes are impacting the amount, type, and location of new retail development that can be expected in the future. In recent years internet sales revenues have grown significantly faster than brick-and-mortar store revenues. The growth in e-commerce has resulted in a decline in demand for certain types of stores, and threatens the viability of some stores. Across the country – and in many of the cities along the El Camino Real – demand for new retail is now driven by stores that do not compete with e-commerce, including restaurants, grocery stores (up to now), personal services, and business services. At the same time, some of the aging retail space along the El Camino Real no longer conforms to the preferences of modern retailers and consumers, who typically look for large storefronts with high ceilings and appealing, high visibility signage, located in concentrated nodes with high traffic, easy vehicle and pedestrian access, and nearby complementary uses.

Mismatch Between Land Use Policies and Changed Market Conditions

Retaining existing commercial and attracting new development to the El Camino Real Corridor will be highly dependent on two key elements: a real estate market that supports the desired development, and land use regulations that allow financially feasible building types. While many jurisdictions have embraced the principle of higher intensity development in the Corridor, local zoning regulations may be inconsistent with the market and feasibility factors that influence what types of projects are built in specific locations. Examples of the misalignment between local land use policies and market conditions in the El Camino Real Corridor to be considered in future phases of evolving a Specific Plan for Santa Clara's El Camino Real are:

- Jurisdictions often require ground-floor retail uses on much or all of El Camino Real and other commercial streets in the region. However, market demand for retail uses is limited (partly due to the factors cited earlier). In many situations, the specific locations zoned for retail or mixed-use projects may not be desirable from a retailer's perspective. Given the increasingly competitive retail environment, it will be important for cities such as Santa Clara to plan carefully for new retail and mixed-use development, being realistic about the amount of retail that can be supported and the types of locations that are most likely to attract tenants.
- Zoning can constrain rather than incentivize development. In some places along the El Camino Real, zoned heights or densities may be insufficient to achieve the density required to incentivize reuse or redevelopment of underutilized sites. This has the unintended consequence of discouraging investment and upgraded retail/eating/drinking along the El Camino Real. Density will be evaluated as the ECRSP process proceeds.
- There are a limited number of locations that can support high-rise development. Some communities have envisioned high-rise development on the El Camino Real, but there are few locations that can justify the high cost of these taller buildings. Three- to five-story, wood-frame construction is generally a more feasible building type that can also accommodate significant densities with lower heights. The cost of different building types is an important factor in planning for intensification of the El Camino Real, and will be taken into account in the next phase of this specific plan effort.
- On-site parking requirements drive up costs. The cost of providing on-site parking is a key driver of development feasibility. Building structured or underground parking is expensive – up to \$40,000 to \$50,000 per parking space – and the amount of parking included can determine

whether or not a project is financially feasible. A large amount of on-site parking can also be a challenge from a physical perspective, particularly on small parcels.

The foregoing zoning and financial issues will be evaluated as a basis for recommendations that will evolve from this Specific Plan update effort.

Regulation Should Align Land Use with Market and Physical Conditions

Zoning, parking, and other regulations should align with market and physical conditions to support commercial retention. Key regulatory goals could include:

1. Develop geographically specific goals and policies for sub-districts within the Corridor.
2. Change height, floor area ratio (FAR), and other zoning requirements to allow financially feasible densities.
3. Allow mixed-use development by right in appropriate locations.
4. Enact sliding residential density scale requirements that allow developers to build at higher densities on larger lots; increased residential density will lead to additional retail sales at existing local businesses.
5. Consider reduction of on-site parking requirements for new development in appropriate locations.
6. On small sites, consider elimination of parking requirements for ground floor uses.

Community Benefits and Other Value Capture Tools

As discussed earlier, in contrast to the market conditions likely to restrain sales performance in the older eating/drinking/shopping facilities in the ECRSP, there is clear evidence that the market will support high density residential at opportunity sites in the ECRSP Area. Indeed, residential market pressures are such as to potentially support residential development at even higher densities than permitted by current zoning.

Therefore, KMA's opinion is that the core of a Commercial Retention Strategy should include a Community Benefit Overlay District on those ECRSP Area sites that are now occupied by older eating/drinking/shopping facilities. The recommended Community Benefit Overlay District would require that – in return for the right to develop residential at high density levels – developers make available within their redevelopment project space for existing tenants at to be determined affordable rents. And while such affordable rents will no doubt require developer "subsidy," such subsidy should be acceptable because the developer will receive the right to higher residential density by virtue of the imposition of a Community Benefit Overlay District. It should be noted that such a community benefit requirement would be additive to the development requirements and exactions that are imposed on projects by existing General Plan and Zoning Ordinance standards.

Apart from the suggested Community Benefit Overlay District, other value capture tools should be considered to determine whether they can also be a part of the Commercial Retention Strategy for ECRSP. Value capture tools which could be included in the Commercial Retention Strategy for ECRSP are presented next.

- **Business Improvement District.** The City could consider implementation of a Business Improvement District that would apply to all or a portion of the ECRSP Area and contribute to desired improvements or commercial retention. Business Improvement Districts (BIDs) are a

type of assessment district, and are common features of many downtowns and commercial areas. BIDs are established when property owners come together and agree to assess themselves on an annual basis in order to generate additional revenue to fund improvements. Improvements could include localized marketing, sanitation, lighting, security and other services. A BID can help revitalization an aging commercial area and lead to increased revenues for business owners.

As an example, the City of Palo Alto has a Business Improvement District established in its Downtown. The fee depends on the number of employees, location within the district, and the type of business.

- **Residential or Commercial Linkage Fees.** A fee rate could be established for all new residential (and even commercial developments) in the ECRSP Area that would be specifically targeted to support commercial retention within the ECRSP Area. Generally, Residential and Commercial linkage fees are enacted by many cities to help generate funds for affordable housing. This fee links the production of market rate real estate to that of affordable housing. An example of such a fee is the recently passed affordable housing fees in Santa Clara (Appendix 10).

Like many cities in the Bay Area, the City of Santa Clara has established fees on new retail, office and industrial developments in order to address the demands for more affordable housing. Given the hot residential market in Santa Clara, this value capture tool can be evaluated to link the production of new residential developments in ECRSP to commercial retention.

- **Property Transfer Tax.** A property transfer tax would generate additional revenue that the City could dedicate to commercial retention. Property transfer taxes are charged when a property is sold and provide a mechanism to apply value capture to all residential and commercial properties. This would require voter approval.
- **Dedication of New General Fund Revenues.** The Specific Plan is expected to contribute to new development in the ECRSP Area, which will increase property values and generate additional property tax revenues to the City. Santa Clara could adopt a policy to dedicate a portion of its increase in General Fund revenues to commercial retention. Dedication for more than one year would be subject to voter approval. While this use of funds would be analogous to the previous redevelopment set asides, it is a discretionary decision that the City can make itself without relying upon State law.

However, as noted in other studies of value capture potential, the various California laws that limit how cities can tax properties and issue debt financing present major hurdles for use of a number of value capture strategies. Given the elimination of redevelopment agencies, local governments at present have very limited ability to use tax increment finance in a meaningful way. Other potential value capture strategies, such as assessment districts, are subject to laws connecting payments-to benefits received by property owners and require property owner or voter approval. Due to the foregoing limitations, KMA is of the opinion that implementation of Community Benefits Overlay District is likely to be the most promising approach. Therefore, KMA has compiled information on the approaches applied by several jurisdictions that currently have community benefit programs. These examples are mentioned below.

- **Berkeley Downtown Area Plan.** The Downtown Area Plan requires all new development to provide community benefits. Developments that exceed 75 feet are required to provide additional benefits, either directly or by paying a fee that is established by the City. These benefits are additive to any requirements that would otherwise have been imposed by the City. A representative sample of the benefits is affordable housing, supportive social services, green features, open space, transportation demand management features, job training and

employment opportunities. The benefits package is established on a case-by-case basis using a third-party financial analysis.

- **Emeryville.** The City of Emeryville has a program that allows for additional FAR, height and/or residential density in return for the provision of community benefits. The maximum achievable increase in development is defined by site. The actual bonus is tied to the provision of community benefits that are identified on a menu, and valued using a point system that yields a maximum of 100 points. The menu includes public open space, sustainable design, alternative energy, water efficiency, and other benefits at the discretion of the Planning Commission or City Council. The project's score as a percentage of the 100 possible points represents the percentage share of the maximum allowable bonus that the project can receive. The increased development rights are awarded in the form of a Conditional Use Permit (CUP).
- **San Francisco Neighborhood Area Plans.** The City has created plans for the various neighborhoods within San Francisco that include community benefits requirements. For example, in the Eastern Neighborhood Areas Plan, a three-tiered approach has been adopted. Tier 1 equates to the baseline zoning, and does not carry any community benefits in excess of the standard requirements imposed by the City. Tier 2 allows for the development of one or two additional stories, and Tier 3 allows for the development of three or more additional stories. The community benefit is based on a fee tied to the additional amount of residential and non-residential building area. The fee is deposited into a fund, which is used for affordable housing; open space and recreation; community facilities; and other benefits that are deemed to enhance livability.
- **Downtown San Diego Community Plan.** The Downtown San Diego Community Plan provides extra density in specified Downtown areas, measured in terms of FAR. The increase is measured under a "FAR Bonus Points" system using a menu of on-site benefits and through payment of a fee to a fund that is used to provide new parkland and open space. The program is operated on a ministerial basis, and FAR bonuses are predetermined based on the amount of community benefits provided. Covenants, conditions and restrictions (CC&Rs) are required for some benefits to ensure that they are maintained over the long term.
- **Los Angeles Cornfield Arroyo Seco Specific Plan.** The City of Los Angeles Cornfield Arroyo Seco Specific Plan is designed as an FAR Bonus Program, which allows for additional height and/or density in exchange for the provision of affordable housing or community benefits. CC&Rs are required for some benefits to ensure that they are maintained over the long term. The program is operated on a ministerial basis, and FAR bonuses are predetermined based on the amount of community benefits provided.
- **Santa Monica Land Use and Circulation Element.** The City of Santa Monica's Land Use and Circulation Element (LUCE) defines a comprehensive program that incentivizes new development above a 32 foot established base height. The program implements a three-tiered approach, based on increments in height and floor area, that defines additional requirements consistent with the community's broader social and environmental goals. Community benefits must be provided in exchange for developing the more intense Tier 2 and Tier 3 development standards. Tier 1 projects are approved on a ministerial basis. Tier 2 and Tier 3 projects are approved on a discretionary basis, with community benefits negotiated on a case-by-case basis. Tier 3 projects are required to utilize a Development Agreement.
- **Culver City Mixed-Use Ordinance.** The Culver City Mixed-Use Ordinance is designed as an FAR Bonus Program, which allows for an increase in density along defined commercial corridors in exchange for the provision of community benefits that are based on defined local

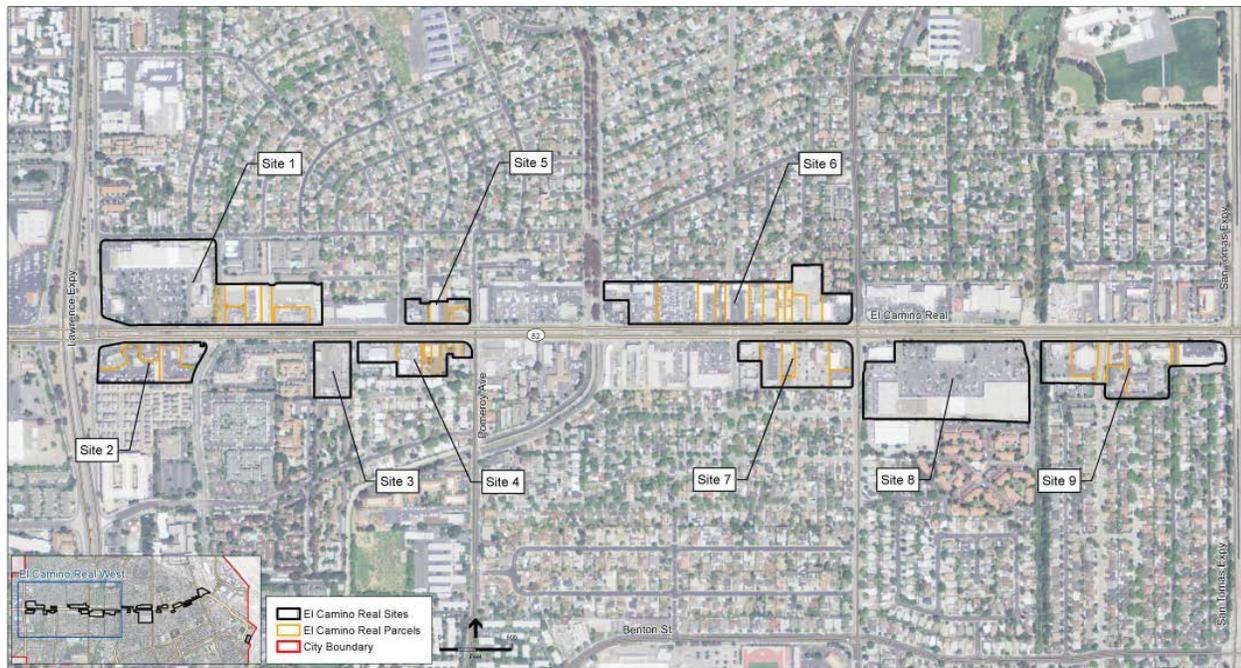
community needs. The costs of the benefits are quantified based on a formula created by KMA. The program is administered on a discretionary basis with the community benefits negotiated on a case-by-case basis.

- **Seattle Incentive Zoning Program.** The City of Seattle implemented an Incentive Zoning Program, which provides FAR bonuses in return for the payment of an in-lieu fee or the provision of affordable housing to secure high-rise development entitlement for residential projects in the Downtown; the provision of childcare and affordable housing units in exchange for increased density in downtown commercial projects; and the provision of open space, affordable housing, and landmarks preservation in other locations. The program is operated on a ministerial basis, with FAR bonuses predetermined based on the amount of community benefits provided.
- **Laguna Niguel Gateway Specific Plan.** The Laguna Niguel Gateway Specific plan provides density incentives for the assembly of parcels for larger, cohesive projects, and a contribution of community benefits. In addition, the applicant receives expedited entitlement process for catalytic development sites. The program is administered on a discretionary basis with community benefits negotiated on a case-by-case basis through Development Agreements.

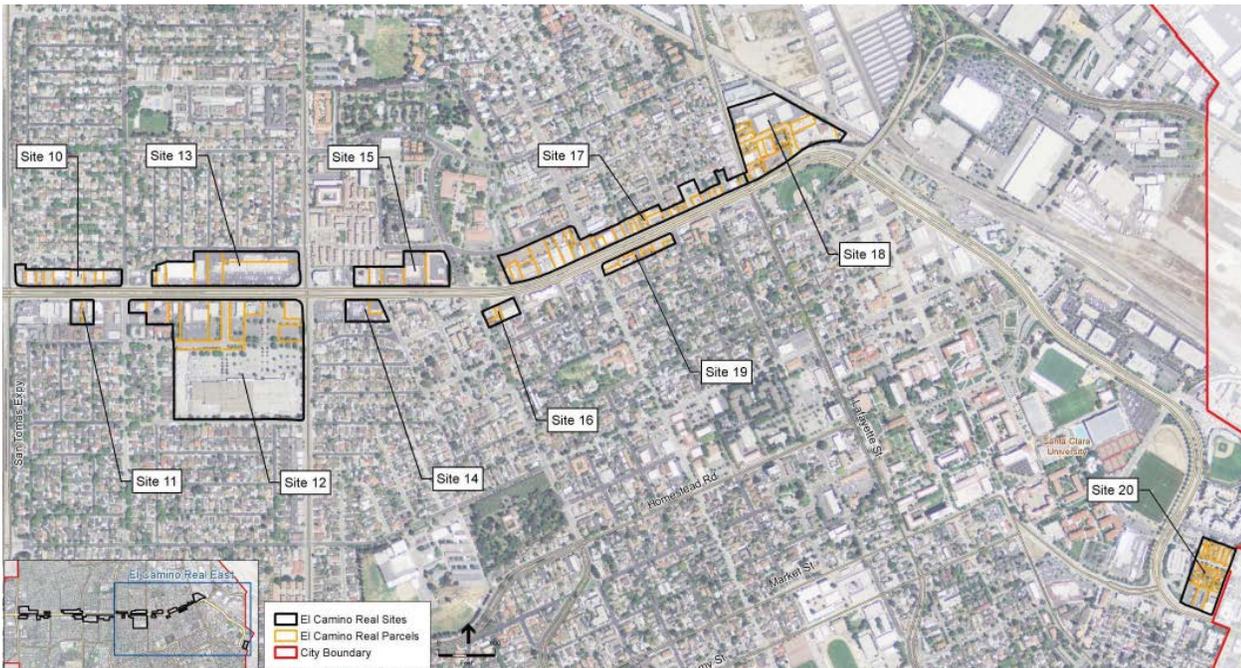
The preceding examples of approaches used in other jurisdictions should provide a basis for Santa Clara to adopt a Commercial Retention Strategy right for the El Camino Real's particular needs.

- Appendix 1. Map of the 19 Candidate Sites Identified in Housing Element
- Appendix 2A. ECRFA Development Pipeline
- Appendix 2B. Map of the Development Pipeline Projects in ECRFA
- Appendix 3. Housing Capacity of the 19 Candidate Sites in ECRFA
- Appendix 4. Map of the Trade Area
- Appendix 5. Demographic Statistics
- Appendix 6. Housing and Job Growth Forecast, City and County of Santa Clara, and Trade Area
- Appendix 7. Population Distribution by Race, City of Santa Clara
- Appendix 8. Retail Leakage Analysis for 2 Mile Trade Area, 2017
- Appendix 9A. Estimated Retail Area in the 19 Candidate Sites in ECRFA
- Appendix 9B. Estimated Retail Area in Other Sites in ECRFA
- Appendix 10. Proposed Housing Fees
- Appendix 11. Chamber of Commerce and Convention-Visitors Bureau Survey

El Camino Real Focus Area: Western Portion



El Camino Real Focus Area: Eastern Portion



Source: City of Santa Clara 2010-2035 General Plan, Appendix 8.12 Housing Element (approved december 2014)
Housing Capacity of the individual sites presented in Appendix 3.

Appendix 2A. ECRFA Development Pipeline
El Camino Real Specific Plan Area Study
City of Santa Clara

1/30/2018

S.No	Address	Status of Entitlement	Net New Commercial/Retail (SF)	Net New Residential Units	Description	Submittal / Approval Date
A	2585 El Camino Real	Built	0	60	60 condo for sale units	8/27/2013
B	2611, 2621, 2635, 2645, 2655 El Camino Real	Built	0	183	Development of a multi- family residential project (183 units) on 5 parcels including former Russels Furniture property and El Real Nursery site	9/15/2013
C	3700 El Camino Real (Project just south of El Camino Real Focus Area, on Lawrence Express Way)	Approved (Under Construction)	87,000	476	Gateway Santa Clara (formerly Kohls Site); Mixed use development- Redevelopment of entire site 87K retail/commercial and 476 housing units (apartments)	2/1/2015
D	1525 Alvio St	Approved (Under Construction)	0	40	40 unit townhouse project- 3 stories	Came across during Site Visit
Subtotal: Net New Built/Under Construction			87,000	759		
E	1890 El Camino Real	Approved	0	56	56 for sale units condo units	9/27/2016
F	2232 El Camino Real	Approved	10,000	151	Rezoning a 2.74 acre project site to PD for a four-story mixed-use project with 151 senior apartment homes, 17,909 square foot of commercial space, and 277 parking spaces provided in a wrapped parking structure and parking lot.	6/30/2017
Subtotal: Net New Approved			10,000	207		
G	2250 El Camino Real	Pending	10,595	55	Pre-application for 55 apartments- 3 floors over podium parking (Western Motel site)	7/15/2016

Appendix 2A. ECRFA Development Pipeline
El Camino Real Specific Plan Area Study
City of Santa Clara

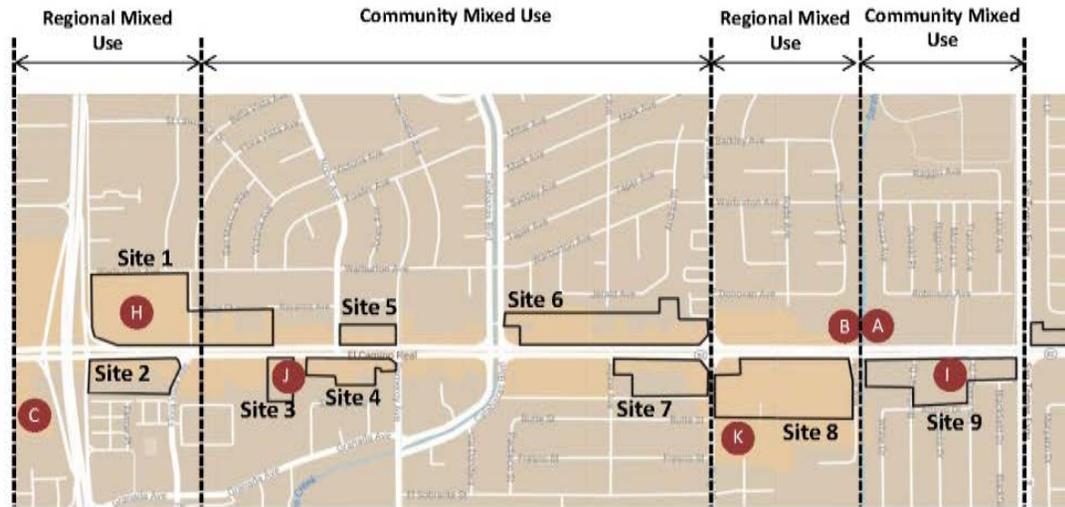
1/30/2018

S.No	Address	Status of Entitlement	Net New Commercial/Retail (SF)	Net New Residential Units	Description	Submittal / Approval Date
H	3501 El Camino Real	Pending	86,000	700	Pre-application for the development of 100,000 square foot shopping center into a mixed use development including 80,000-86,000 sqft retail and up to 700 apartments	10/1/2015
I	2490, 2500 El Camino Real	Pending	206,000	398	Proposal for 332 market rate residential units and 66 senior residential units totaling 398 dwelling units, a 306-room hotel with a 6,000 square foot restaurant comprising 205,197 square feet of commercial space on a 7.14 acre site	7/1/2015
J	3402 El Camino Real	Pending	9,900	66	Rezoning of a 2.27 acre site that was recently burned down, and redevelop a mixed-use project with 66 apartment units, 9,440 square feet of retail, amenities on the third floor, surface parking, and two-level garage parking.	3/1/2017
K	2780 El Camino Real	Pending	0	58	General Plan Amendment from Regional Commercial to Medium Density Residential; Rezone from CC to PD & Architectural Review for 58- 3 story townhomes	4/1/2017
Subtotal: Net New Pending			312,495	1,277		
Total New Built/Approved/Pending			409,495	2,243		

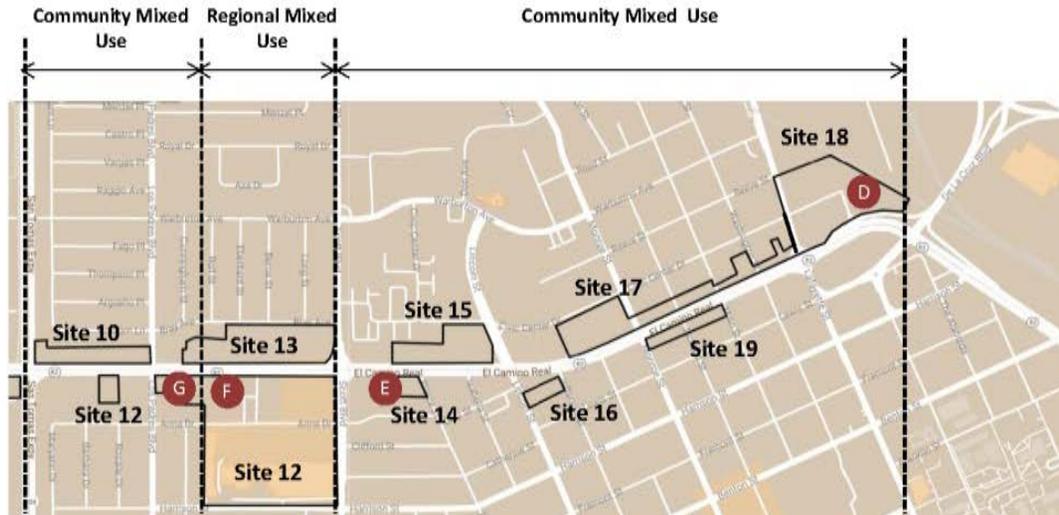
Source: City of Santa Clara, Development Pipeline

The following map in Appendix 2B presents the above mentioned projects, as per their corresponding Serial Numbers, along with the 19 sites recognized in the Housing Element (Appendix 1).

El Camino Real Focus Area: West of San Tomas Expressway



El Camino Real Focus Area: East of San Tomas Expressway



Appendix 3. Housing Capacity of the 19 Candidate Sites in ECRFA
El Camino Real Specific Plan Area Study
City of Santa Clara

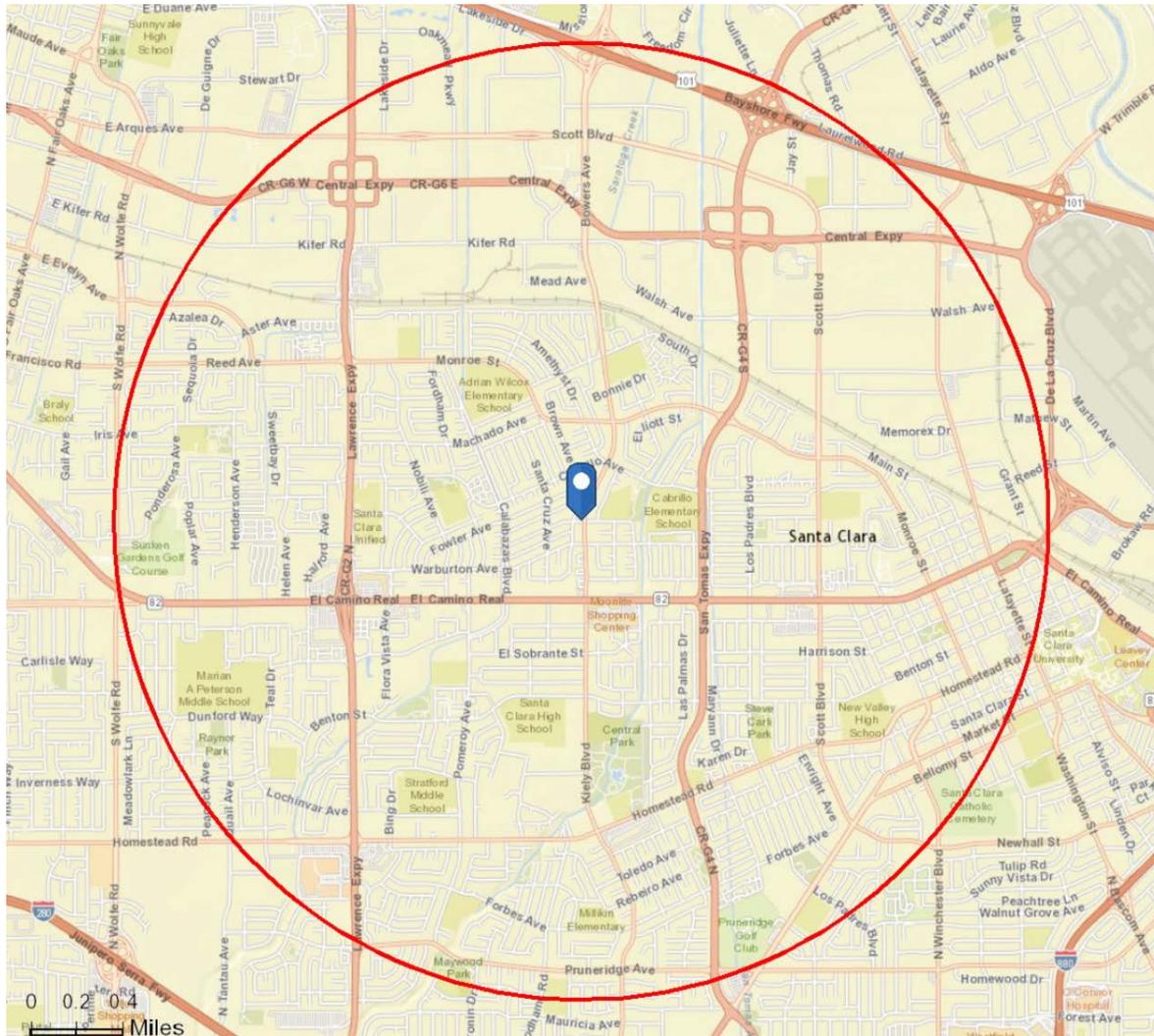
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	Number of Parcels	Acres	Capacity
Site 1	7	15.01	345
Site 2	5	4.38	110
Site 3	1	2.23	40
Site 4	9	3.16	57
Site 5	4	1.66	30
Site 6	12	11.01	198
Site 7	6	5.14	93
Site 8	1	13.48	337
Site 9	6	7.78	140
Site 10	9	3.32	58
Site 11	2	0.98	18
Site 12	10	8.1	142
Site 13	7	8.09	189
Site 14	2	1.48	27
Site 15	5	4.52	81
Site 16	4	1.07	19
Site 17	24	8.79	158
Site 18	16	8.73	157
Site 19	8	1.42	26
Subtotal: El Camino Real Focus Area		110.35	2,225
Site 20	20	3.7	76
Total (including Site 20)		114.05	2,301

Source: City of Santa Clara 2010-2035 General Plan, Appendix 8.12 Housing Element (approved december 2014)

Appendix 4. Map of the Trade Area
El Camino Real Specific Plan Area Study
City of Santa Clara

1/30/2018



Source: Base Map from ESRI Business Analyst

Appendix 5. Demographic Statistics
El Camino Real Specific Plan Area Study
City of Santa Clara

1/30/2018

	Approximate 2 Mile Trade Area	City of Santa Clara	County of Santa Clara
<u>Population</u>			
2010 Total Population	88,744	116,470	1,781,642
2017 Total Population	97,270	127,159	1,958,087
<u>Households</u>			
2010 Households	33,616	43,022	604,204
2017 Households	36,262	46,101	656,221
Average Household Size	2.66	2.70	2.94
<u>Density</u>			
Population / sq. mile	7,744	6,907	1,502
HH / sq. mile	2,887	2,504	503
<u>Income</u>			
Median Household Income	\$92,260	\$98,603	99,069
Average Household Income	\$119,802	\$123,232	136,314
Per Capita Income	\$44,747	\$45,732	46,199
Aggregate Income (\$M)	\$4,344	\$5,681	\$89,452
<u>Housing Units</u>			
Total Units	37,484	47,559	677,194
Vacancy %	4.8%	3.1%	3.1%
% Renter Occupied	49.8%	53.4%	42.7%
% Owner Occupied	45.4%	43.5%	54.2%
<u>Average Population Growth</u>			
2010-2017	1.4%	1.3%	1.4%
<u>Race and Ethnicity</u>			
White Alone	41.7%	40.5%	43.3%
Asian Alone	40.1%	42.3%	35.7%
Other	18.2%	17.2%	21.0%
<u>Daytime (Worker Population)</u>	61,212	113,577	940,273

Source: ESRI Business Analyst, 2017

Appendix 6. Housing and Job Growth Forecast, City and County of Santa Clara, and Trade Area
El Camino Real Specific Plan Area Study
City of Santa Clara

1/30/2018

	ESRI Estimates¹	Based on ABAG		Avg Annual %
	2017	Forecast²	Difference	Change
	2017	2032	2032-2017	2032-2017
<u>County of Santa Clara</u>				
Population	1,958,087	2,254,000	295,913	1.0%
Housing Units	677,194	787,000	109,806	1.1%
Households	656,221	762,000	105,779	1.1%
Jobs	940,273	1,149,000	208,727	1.5%
<u>City of Santa Clara</u>				
Population	127,159	147,424	20,265	1.1%
Housing Units	47,559	55,248	7,689	1.1%
Households	46,101	53,448	7,347	1.1%
Jobs	113,577	136,733	23,156	1.4%
<u>Approximate 2 Mile Trade Area³</u>				
Population	97,270	112,772	15,502	1.1%
Housing Units	37,484	43,544	6,060	1.1%
Households	36,262	42,041	5,779	1.1%
Jobs	61,212	73,692	12,480	1.4%

Notes:

1. ESRI Business Analyst, 2017.
2. FY2032 Demographic numbers calculated based on ABAG and MTC's report: Draft Plan Bay Area: Strategy for a Sustainable Region, March 2013, Draft Forecasting on Jobs, Population and Housing. FY2032 numbers have been extrapolated from FY2010 and FY2040 numbers presented in the report, assuming a straight line increase from FY2010 and FY2040.
3. KMA estimates.

Appendix 7. Population Distribution by Race, City of Santa Clara
El Camino Real Specific Plan Area Study
City of Santa Clara

1/30/2018

City of Santa Clara	2015 Estimate¹		2017 Estimate²		2022 Estimate²	
	Population	%	Population	%	Population	%
One Race	115,863	95%	119,999	94%	126,693	94%
White	55,811	46%	51,443	40%	50,154	37%
Black or African American	4,493	4%	3,366	3%	3,450	3%
American Indian and Alaska Native	580	0%	552	0%	545	0%
Asian	48,171	40%	53,794	42%	61,343	46%
Asian Indian	18,712	15%	20,896	16%	23,829	18%
Chinese	10,818	9%	12,081	10%	13,776	10%
Filipino	7,056	6%	7,880	6%	8,985	7%
Japanese	1,981	2%	2,212	2%	2,523	2%
Korean	3,047	3%	3,403	3%	3,880	3%
Viernamese	3,975	3%	4,439	3%	5,062	4%
Other Asian	2,582	2%	2,883	2%	3,288	2%
Native Hawaiian and Other Pacific Islander	867	1%	646	1%	655	0%
Native Hawaiian	76	0%	57	0%	57	0%
Guamanian or Chamorro	546	0%	407	0%	412	0%
Samoan	60	0%	45	0%	45	0%
Other Pacific Islander	185	0%	138	0%	140	0%
Some Other Race	5,941	5%	10,198	8%	10,546	8%
Two or More Races	5,511	5%	7,160	6%	7,757	6%
White and Black or African	615	1%	1,322	1%	1,432	1%
White and American Indian and Alaska Native	338	0%	726	1%	787	1%
White and Asian	2,347	2%	5,043	4%	5,464	4%
Black or African American and American Indian and Alaska Native	32	0%	69	0%	74	0%
Total Population	121,374	100%	127,159	105%	134,450	111%

Note:

1. ACS Demographic and Housing Estimates, 2011-2015, 5-Year estimates
2. ESRI Business Analyst and KMA estimates

Appendix 8. Retail Leakage Analysis for 2 Mile Trade Area, 2017**El Camino Real Specific Plan Area Study**

City of Santa Clara

1/30/2018

	Demand (Retail Potential)⁴	Supply (Retail Sales)⁶	Import/ (Leakage)⁵
Regional Retail (Comparison Retail) ⁴	\$721,355,832	\$813,895,242	\$92,539,410
Food/ Health and Misc. (Convenience Retail) ⁵	\$472,206,926	\$314,387,911	(\$157,819,015)
Eating and Drinking ⁶	\$198,686,977	\$160,610,211	(\$38,076,766)
Sub total (Brick and Mortar)	\$1,392,249,735	\$1,288,893,364	(\$103,356,371)
Online and Non Store Retail ⁷	\$53,313,367	\$31,031,836	(\$9,121,341)
Total Retail	\$1,445,563,102	\$1,319,925,200	(\$112,477,712)

Notes:

1. Source: ESRI Business Analyst, 2017. Esri draws estimates of consumer spending from the Bureau of Labor Statistics' annual Consumer Expenditure Surveys (CEX), which provide consumer spending information for hundreds of goods and services by households but not by source. The consumer spending model incorporates Esri's Tapestry™ Segmentation system. This yields improved differentiation of spending, particularly for smaller markets where distinctions can be difficult to measure and for big-ticket items where consumer preferences are more pronounced. The product line sales from the 2012 Census of Retail Trade are the basis for the crosswalk to market demand by establishment from the consumer expenditure data. Esri's retail potential model incorporates methods to update product line sales, taking into account changes in retail activity since 2012 (2017 Methodology Statement: ESRI Retail Marketplace).
2. Source: ESRI Business Analyst, 2017. Estimates of retail sales begin with the benchmark, the 2007 and 2012 CRT from the US Census Bureau. Trends from the economic censuses are used to update the base along with Esri's extensive portfolio of demographic and business databases. These include commercial and government sources such as the Infogroup business database and economic statistics from the Bureau of Labor Statistics. Supply estimates also incorporate data from the Census Bureau's Nonemployer Statistics (NES) division. Smaller establishments without payrolls, such as self-employed individuals and unincorporated businesses, account for a small portion of overall sales. However, these businesses represent more than half of all retailers in the United States. Their inclusion completes the report of industry sales (2017 Methodology Statement: ESRI Retail Marketplace).
3. The difference between supply and demand represents the opportunity gap or surplus available for each retail outlet in the trade area. When supply is greater than demand, City retailers are capturing sales from customers outside of the trade area. When supply is less than demand, local customers are spending money outside of the trade area.
4. Includes furniture, home furnishing, electronics, building materials, clothing, sports, general merchandise. Excludes automotive and gasoline stations.
5. Includes grocery, food, liquor, health, personal care stores, and miscellaneous stores.
6. Includes special food services, drinking places, restaurants and other eating places.
7. Includes Elec. Shopping & mail order houses, vending machine operations and direct selling establishments.

**Appendix 9A. Estimated Retail Area in the 19 Candidate Sites in ECRFA
El Camino Real Specific Plan Area Study
City of Santa Clara**

1/30/2018

Sites	Estimated Acreage	Retail Acreage	Retail Bldg SF	Comparison Retail	Convenience	E&D	Notes - other uses / acreage
1	15	14	150,000		120,000	10,000	
2	4	-	-	-	-	5,000	2 hotels, 1 restaurant
3	0.2	-	-	-	-	-	vacant lot
4	3	2	20,000	-	20,000	10,000	See's Candy, etc.
5	2						no retail, no eating and drinking
6	11	1	10,000	-	10,000	minimal	mostly auto
7	5	2	10,000	5,000	5,000	minimal	Goodwill
8	13	8	90,000	45,000	45,000	30,000	Palo Alto Medical
9	8	1	10,000	-	10,000	15,000	Mariann's Inn - 4 AC
10	3	1.5	-	-	-	15,000	site mostly restaurant
11	1						
12	28	18	300,000	200,000	50,000	30,000	
13	8	7	60,000	-	60,000	10,000	grocery + auto parts
14	1.5						was auto, appears vacant
15	4.5	1.5	10,000	-	-	10,000	includes Burger King & Denny's
16	1						mostly auto
17	9	0.5	5,000	-	-	5,000	mostly auto
18	9						negligible retail, some auto
19	1.5						mostly vacant
Total	128	57	665,000	250,000	320,000	140,000	

Source: Google Maps, Site Survey, hotels.com, apartments.com

Appendix 9B. Estimated Retail Area in Other Sites in ECRFA
El Camino Real Specific Plan Area Study
City of Santa Clara

1/30/2018

	Estimated Acreage	Retail Acreage	Retail Bldg SF	Comparison Retail	Convenience	E&D	Notes - other uses / acreage
Areas North of ECR							
A - between Site 1 & 5 (Nobil & to end of Rayanna)	2	2	20,000	0	15,000	5,000	
B - between site 5 & 6 (Pomeroy & Calabazas)	4.5	2.25	22,500	0	0		2.25 acres - 1 Apartment Bldg - Tuscany Apts (135 units) 3 auto related businesses
C - between 6 & 10 (Bowers & San Tomas)	14.5	4.5	45,000 SF	0	22,500	22,500	Remaining 9.5 acres of site - Alexis condo, Camino del Rey Senior housing (48 units), Villas on the Blvd Apts (186 units) Four Hotels - Hotel Stratford - 31 rms, \$103 Holiday Inn Express - 97 rms, \$110 The Capri - 38 rms, \$145 Granada Inn - 67 rms, \$100
D - between 10 & 13 (1/2 block after Los Padres)	0.25	0.25	2,500 SF	0	currently zero		closed drive through
E - btween 13 & 15 (Scott & 1805 ECR)	2	2	20,000	0	10,000	10,000	
F - between 15 & 17 west of Lincoln	n/a						city owned building
Total:	23.25	11	62,500	0	47,500	37,500	

Appendix 9B. Estimated Retail Area in Other Sites in ECRFA
El Camino Real Specific Plan Area Study
City of Santa Clara

1/30/2018

	Estimated Acreage	Retail Acreage	Retail Bldg SF	Comparison Retail	Convenience	E&D	Notes - other uses / acreage
Areas South of ECR							
G - between site 2 & 3 (W of Flora Vista Ave)	5	4	40,000	5,000	25,000	20,000	1 acre - Wharburton Apt Building - 48 units
H - between site 4 & 7 (Pomeroy & Alpine)	13	11.5	115,000	0	45,000	30,000	1 acre- Motel 6 (99 rms , \$90) 5 acres - 8 auto related businesses
I - between site 9 & 12 (San Tomas to Los Padres)	4	4	40,000	0	15,000	5,000	2 acres - 4 auto related businesses
J - between 12 & 14	1	1	10,000	0	0	10,000	one McDonalds on site
K - between 14 & 16 (Pierce to Lincoln)	2.5	1.75	17,500	0		17,500	.75 acre - Holiday Inn Express & Suites (47 rms, \$135)
L - between 16 & 19 (Jefferson to Monroe)	n/a						one non profit building
M - west of 19 (Main to Lafayette)	1.5	1	10,000	0	5,000	5,000	.5 acres - EAH Gateway - senior affordable apts (42 units)
Total:	27	23.25	232,500	5,000	90,000	87,500	

Area West of Lawrence Park Expressway

N - west of Lawrence Expy	11	11	90,000	20,000	60,000	10,000	Lawrence Expressway Plaza- anchored by Luckys & Big Lots; along with other E&D, convenience retail 56000 lucky 20000 big lots
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Source: Google Maps, Real Quest for site acreage estimates, hotels.com, apartments.com



**City of
Santa Clara**
The Center of What's Possible

EI CAMINO REAL SPECIFIC PLAN: TRANSPORTATION PROFILE



TRANSPORTATION

Transportation Behavior

It is important to understand how people in the El Camino Real Specific Plan Area currently travel and how they use the various components of the transportation system as a basis for projecting future travel behavior and future travel needs. The major source of travel data is the US Census Bureau, American Community Survey. This data contains information regarding commute trips and is reported at the census block group level and can be aggregated (added) to both the City and County level for comparison purposes. As shown on **Figure 0-1**, the census block groups do not fit within the Plan Area; they include adjacent parcels. The data nonetheless, provides a good summary of existing work-related travel behavior in the area. It should be noted that commute trips are only a portion of travel in the area. People also travel for shopping, school, socializing, recreational and other reasons.

Commute Mode Share

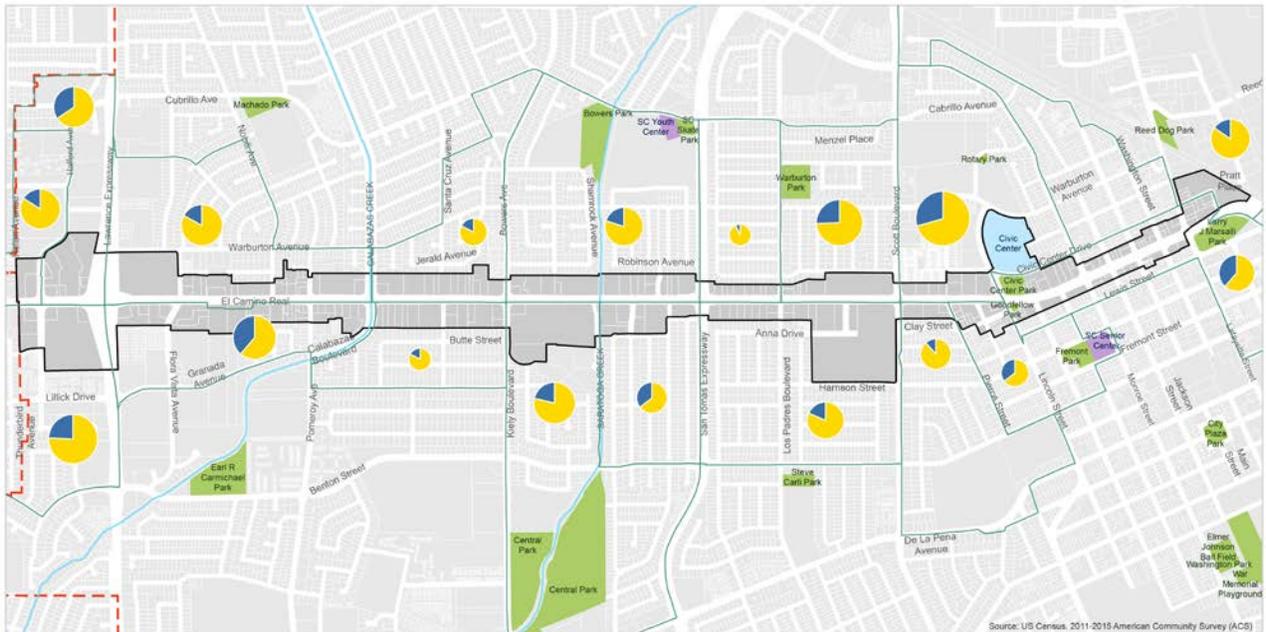
This section illustrates how people who live in the El Camino Real Specific Plan Area travel to and from work. As shown in **Table 0-1** people living in this area rely heavily on cars as their primary mode of transportation for commute trips. However, transit and active travel modes (biking and walking) make up nearly 11% of all commute trips, which is slightly higher compared to data for the City as a whole and the County of Santa Clara.

Means of Travel to Work	Project Area - Census Tract (%)	City of Santa Clara (%)	Santa Clara County (%)
Drove Alone	74.3%	76.4%	75.9%
Carpooled	11.1%	8.9%	10.4%
Total Car Travel	85.5%	85.2%	86.3%
Public Transportation	7.6%	3.9%	4.1%
Bicycled	1.0%	1.8%	1.9%
Walked	2.1%	3.8%	2.0%
Total Non-Car Travel	10.7%	9.5%	8.0%
Worked from home	3.2%	4.5%	4.7%
Other Means	0.6%	0.7%	1.0%

To provide insight on the community’s tendencies to drive based on where they live in the Plan Area, **Figure 0-1** shows the existing drive alone rates by census block groups. In a comparison to the other figures in this chapter, drive alone rates are observed to be lowest near good bicycle facilities and near major transit routes, such as the areas between San Tomas Expressway and Los Padres Boulevard, near Calabazas Boulevard, and adjacent to Scott Boulevard.

Figure 0-1: Drive Alone Rates

El Camino Real Specific Plan Project Area : Drive Alone Rates



Legend

- City Boundary
- Parcels
- PDA Boundary
- PDA Parcels
- Creeks
- Parks
- Civic Center
- Community Centers

Drive Alone Rate (Census Block Group)

- Drive Alone
- Other Means of Transportation to Work



* Pie chart size varies by the total number of residents of each Census Block Group

Vehicle Availability

People who have access to at least one vehicle are more likely to travel by vehicle than people who do not. **Table 0-2** shows the majority of people (93%) living in the El Camino Real Specific Plan Area census blocks area have access to at least one vehicle, which is slightly lower compared to the City as a whole and the County of Santa Clara.

Table 0-2: Vehicle Availability			
Number of Vehicles Available	Project Area - Census Tract (%)	City of Santa Clara (%)	Santa Clara County (%)
No Vehicle Available	7%	6%	5%
1 Vehicle Available	37%	34%	28%
2 Vehicles Available	39%	42%	41%
3 Vehicles Available	12%	13%	17%
4 Vehicles Available	4%	4%	6%
5 or more Vehicles Available	1%	2%	3%

Source: US Census Bureau, 2012-2016 American Community Survey 5-Year Estimates; Fehr & Peers, 2018.

Existing Transportation Network

Roadway Network

Since a majority of work-related travel is done by private vehicle and vehicle availability is high, the roadway network is a major component of the transportation system in the Plan Area, which is shown on **Figure 0-2**. Primary regional vehicle access is provided by San Tomas Expressway, Lawrence Expressway, and El Camino Real. Roadways providing local access are Halford Avenue, Flora Vista Boulevard, Nobili Avenue, Pomeroy Avenue, Calabazas Boulevard, Bowers Avenue-Kiely Boulevard, Los Padres Boulevard, Scott Boulevard, Lincoln Street, Monroe Street, and Lafayette Street. These roadways are described below.

- **Lawrence Expressway** is an eight-lane, north-south roadway that extends between Saratoga Avenue and State Route (SR) 237. One lane in each direction operates as a high occupancy vehicle (HOV) lane, also known as a carpool lane, from 6:00 am to 9:00 am and from 3:00 pm to 7:00 pm Monday through Friday. The major directions of traffic flow on this facility (and other north-south roadways in the area) are northbound in the morning and southbound in the evening.
- **San Tomas Expressway** is a six- to eight-lane, north-south roadway that extends between SR 17 in Campbell and US-101 in the City of Santa Clara. One lane in each direction operates as an HOV lane from 6:00 am to 9:00 am and from 3:00 pm to 7:00 pm Monday through Friday.
- **El Camino Real (SR 82)** is an arterial that runs (generally) north-south from San Francisco to San Jose and parallels US 101 and I-280. In the Plan Area, El Camino Real has an east-west alignment and six travel lanes. The major intersections within the Plan Area are controlled by

traffic signals with the exception of the El Camino Real/Lawrence Expressway interchange. This interchange is grade-separated and diamond-configured. The exit and entrance ramps are controlled by traffic signals. In the City of Santa Clara's General Plan, El Camino Real is classified as an arterial.

- **Bowers Avenue** is a four-lane, north-south arterial roadway that connects US 101 with El Camino Real. South of El Camino Real, Bowers Avenue is called Kiely Boulevard.
- **Kiely Boulevard** is a four-lane, north-south arterial roadway within the city limits of Santa Clara that links El Camino Real to Stevens Creek Boulevard.
- **Scott Boulevard** is a four-lane arterial roadway that provides access to the residential and office buildings near the Plan Area. Scott Boulevard links between Lawrence Expressway and Washington Street in the City and intersects with several other arterial roadways in the City including Bowers Avenue, San Tomas Expressway, Monroe Street, and El Camino Real.
- **Monroe Street** is a two-lane arterial roadway that provides access to residential areas surrounding the Plan Area. Monroe Street is an east-west roadway that links Lawrence Expressway, Calabazas Boulevard, Bowers Avenue, San Tomas Expressway, Scott Boulevard, and El Camino Real north of the Plan Area. To the south Monroe Street provides a north-south connection between El Camino Real and the commercial and residential areas surrounding Westfield Valley Fair.
- **Lafayette Street** is a four-lane, north-south arterial roadway that provides convenient access to both US 101 and Interstate 880 (I-880) via Washington Street and Bascom Avenue.
- **Halford Avenue** is a two-lane connector roadway that provides access between the residential and commercial areas north and south of El Camino Real and adjacent to Lawrence Expressway.
- **Flora Vista Avenue** is a north-south, two-lane road that provides a connection across El Camino Real between Warburton Avenue and Benton Street. North of El Camino Real, Flora Vista Avenue is designated as a local street and south it is a connector roadway.
- **Nobili Avenue** is a two-lane, north-south connector roadway that provides a link between El Camino Real and Monroe Street.
- **Pomeroy Avenue** is a two-lane, north-south road that links between Fowler Avenue and Pruneridge Avenue. South of El Camino Real, Pomeroy Avenue is designated as a collector street.
- **Calabazas Boulevard** is a two-lane, north-south connector roadway that provides a link between Monroe Street and Pomeroy Avenue. Calabazas Boulevard follows and is separated by Calabazas Creek for the majority of its length.
- **Los Padres Boulevard** is a two-lane, north-south connector road that links between residential areas just north of Monroe Street and Pruneridge Avenue.
- **Lincoln Street** is a north-south, connector roadway that provides a link between Warburton Avenue and Winchester Boulevard. Lincoln Street is a four-lane road north of El Camino. From El Camino Real to Homestead Road, Lincoln Street is a two-lane road. Lincoln Street turns into Winchester Boulevard south of Homestead Road.

Roadway Classifications

The City of Santa Clara's General Plan provides roadway classifications to be used as a hierarchical framework for the design and operation of the City's streets. While some roadways are designed to move a higher volumes of vehicles quickly and efficiently, other streets prioritize space for pedestrians,

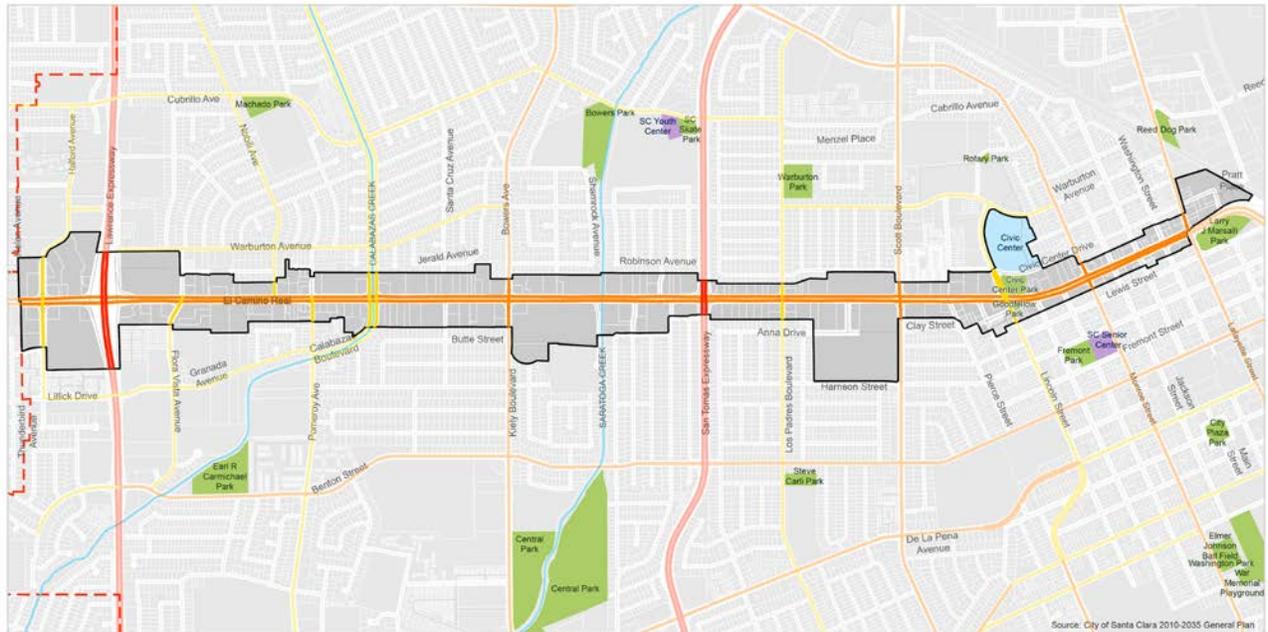
bicyclists, on-street parking, loading zones, and passenger drop-off locations. The General Plan includes five roadway classifications: freeways, expressways, arterials, collectors, and local streets.

- **Freeways** are high-speed travel ways included in the State and federal highway systems and are under the jurisdiction of Caltrans. Their primary purpose is to carry regional through traffic. No pedestrian or bicycle facilities are provided, although transit may travel on these roadways.
- **Expressways** are typically designed with limited access and carry regional traffic. These roadways are under Santa Clara County's jurisdiction and include transit service and stops. Crosswalks are provided at all signalized intersections on expressways. The expressways serving the El Camino Real Specific Plan Area include San Tomas Expressway and Lawrence Expressway.
- **Arterials** are streets that primarily serve through traffic not accommodated by expressways or freeways. These streets are divided into major and minor arterials. Major Arterials serve through traffic and typically include transit vehicles. They are generally designed with four travel (or more) lanes with dedicated left-turn lanes, traffic signals at major intersections, and parallel street parking. Minor Arterials serve through traffic and typically include transit vehicles. Minor arterials are generally designed with two to four travel lanes with dedicated left-turn lanes, traffic signals at major intersections, and parallel street parking. Generally, arterials can provide bicycle facilities and should include sidewalks and street trees. Transit service is emphasized, particularly on major arterials. Major arterials in the Plan Area include El Camino Real, Bowers Avenue/Kiely Boulevard, and Scott Boulevard. Minor arterials in the El Camino Real Specific Plan Area include Lafayette Street and Monroe Street.
- **Collectors** typically provide traffic circulation for residential and commercial uses. These streets penetrate residential neighborhoods to distribute trips from arterials and typically feature two to four lanes of vehicular traffic. They also provide bicycle and pedestrian connections between destinations and should include sidewalks and street trees. Transit services may also be available. Collector streets in the Plan Area include Lincoln Street, Los Padres Boulevard, Calabazas Boulevard, and Halford Avenue.
- **Local Streets** are designed to calm traffic and equally accommodate automobiles, bicycles, and pedestrians. These streets typically serve the interior development parcels, generally providing two travel lanes, on-street parallel parking, and sidewalks. All other streets not previously designated are local streets.

Figure 0-2 illustrates the roadway network and classifications within the El Camino Real Specific Plan Area.

Figure 0-2: Roadway Network

El Camino Real Specific Plan Project Area : Roadway Network



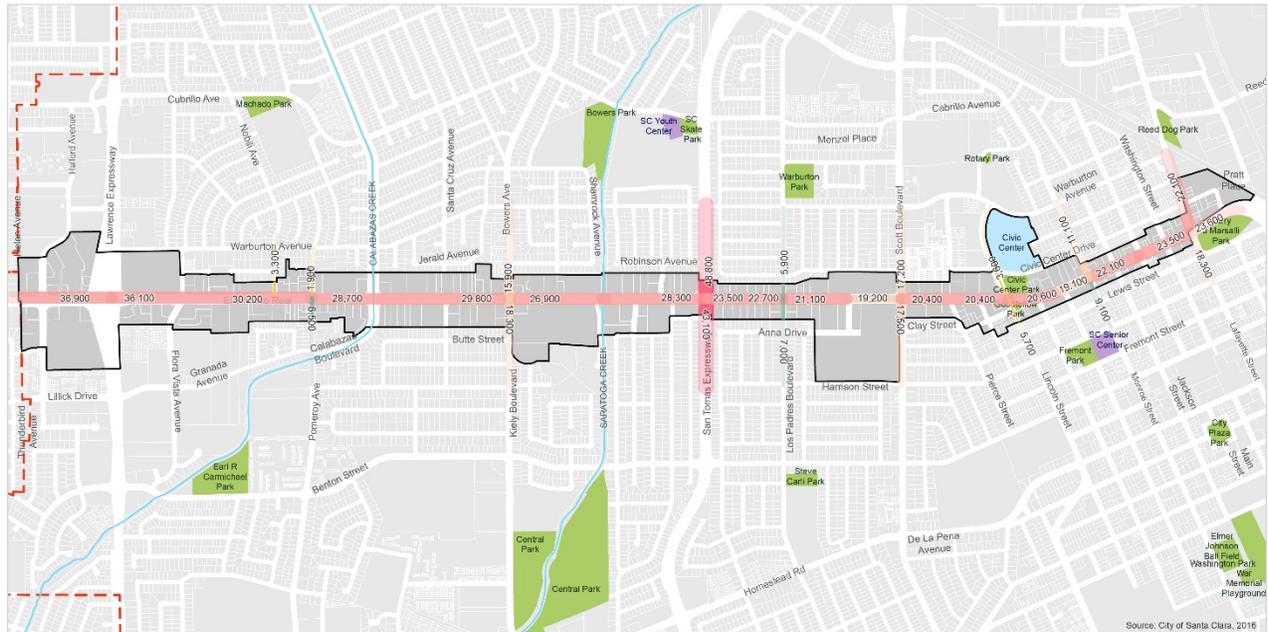
Traffic Volumes

This section provides an overview of existing daily traffic patterns within the Plan Area, and identifies specific streets and intersections with the highest levels of vehicular traffic. **Figure 0-3** shows the existing daily traffic volumes along the expressway and arterial roadways within the El Camino Real Specific Plan Area.

Lawrence Expressway and San Tomas Expressway are the primary gateways in and out of the El Camino Real Specific Plan Area. These roadways tend to carry the largest number of vehicles since they provide users with the most direct and fastest route to and from regional facilities, such as US 101 and I-280, in the area. El Camino Real carries anywhere from 19,000 to nearly 38,000 vehicles per day in the Plan Area, most of which occurs eastbound and westbound from Lawrence Expressway.

Figure 0-3: Daily Traffic Volumes

El Camino Real Specific Plan Project Area : Traffic Volumes



Intersection Operations

Roadway operations and traffic congestion on El Camino Real are typically described from the perspective of vehicle drivers based on the amount of time they are delayed at intersections. The term level of service “LOS” is used to describe these experiences with six levels from LOS A, operating conditions with little to no delay, to LOS F, or operating conditions with excessive delays. In Santa Clara, intersections operating at LOS D or better are considered to be operating at an “acceptable” level.

Table 0-3 and **Figure 0-4** show the existing LOS at expressway and arterial roadways intersections within the El Camino Real Specific Plan Area during the morning and evening commute periods when traffic volumes are at their peak. The intersection of San Tomas Expressway and El Camino Real experiences a LOS F during the morning commute hours. All other intersections in the Plan Area are observed to operate at acceptable LOS.

Intersection	Control ¹	Peak Hour Period	Delay (sec/veh) ²	LOS ³
Lawrence Expressway/El Camino Real	Signalized	AM	26.9	C
		PM	29.9	C

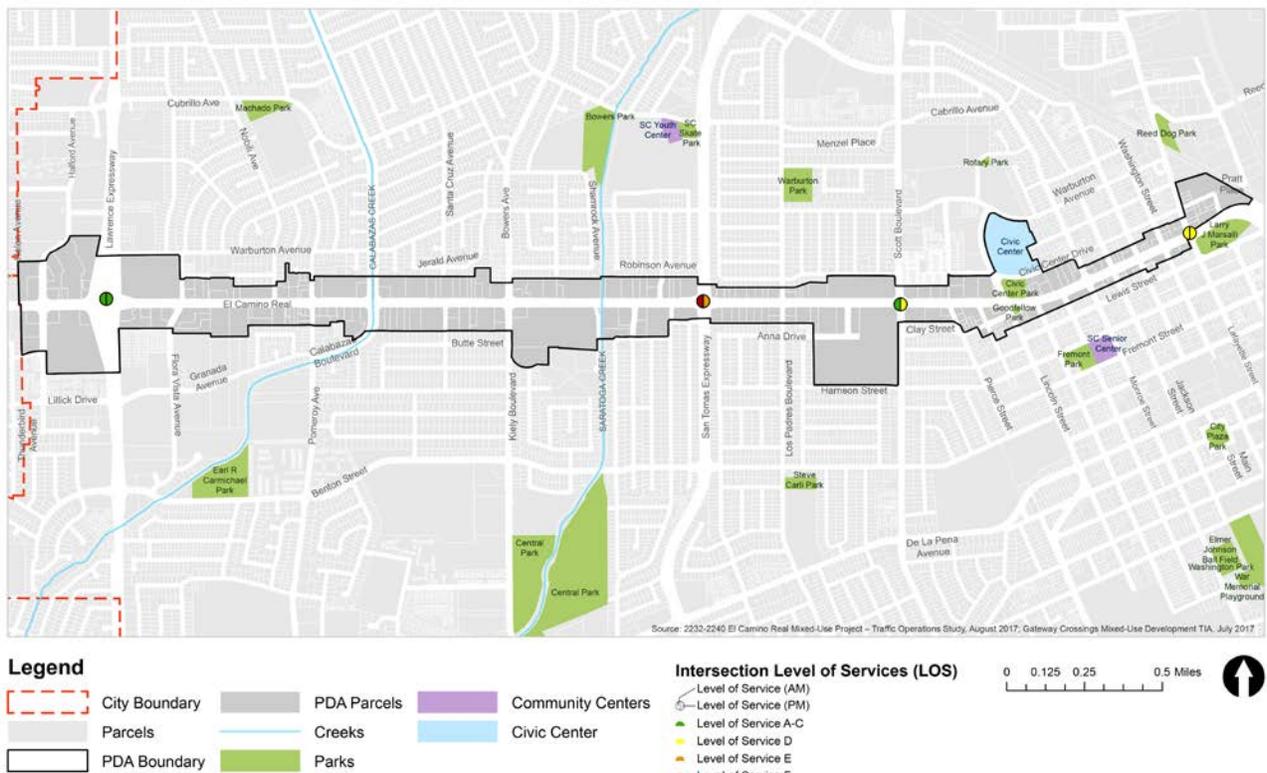
San Tomas Expressway/El Camino Real	Signalized	AM	107.8	F
		PM	76.1	E
Scott Boulevard/El Camino Real	Signalized	AM	33.9	C
		PM	37.2	D
Lafayette Street/El Camino Real	Signalized	AM	39.2	D
		PM	38.8	D

Source: 2232-2240 El Camino Real Mixed-Use Project – Traffic Operations Study, August 2017; Gateway Crossings Mixed-Use Development TIA, July 2017.

Notes: Bold represents unacceptable intersection LOS

Figure 0-4: Intersection Levels of Service (LOS)

El Camino Real Specific Plan Project Area : Intersection Levels of Service (LOS)



Transit Facilities

El Camino Real is a major bus corridor on the San Francisco Peninsula, in Santa Clara County, and in the City of Santa Clara. It is served by the Santa Clara Valley Transportation Authority (VTA) Route 22 and the Rapid 522 bus service, which connect the Palo Alto Transit to the Eastridge Transit Center and points in between. Route 22 and Rapid 522 operate frequently with buses every 10 to 15 minutes during peak commute hours. Rapid 522 has limited stops to support faster service than other bus routes in order to be competitive with private vehicles and other modes of transportation.

The Santa Clara Transit station is the hub for regional commuter service and is connected to the El Camino Real Specific Plan Area by VTA Routes 22, 32, 60 and Rapid 522. Other bus service operates on El Camino Real and intersecting streets providing a network of transit service in the immediate area.

The Plan Area is located in a Transit Priority Project-Eligible Area since it is within one-half mile of a major transit stop and within one-quarter mile of a high-quality transit corridor. The Office of Planning and Research (OPR) has released draft language for determining the significance of transportation impacts of projects within a Transit Priority Project-Eligible Area. As currently proposed by the OPR, projects within one-half mile of either an existing major transit stop or a stop along an existing high quality transit corridor should be presumed to have a less than significant transportation impact and no further transportation analysis would be required under the California Environmental Quality Act (CEQA).

Regional Transit

Santa Clara’s regional transit network includes passenger rail and bus facilities. Located less than a mile to the south-east of the El Camino Real Specific Plan Area is the Santa Clara Transit Station. Santa Clara Station is a point of convergence for Caltrain commuter rail between San Francisco and Gilroy; Amtrak’s Capitol Corridor train, which links San Jose and Sacramento; the Altamont Commuter Express (ACE), which connects Stockton and San Jose; VTA county-wide bus service, and is a planned station for the Silicon Valley BART extension.

Local Transit Network

VTA operates fixed route, commuter, and paratransit bus service and light-rail service (LRT) in Santa Clara County. VTA serves the El Camino Real Specific Plan Area with local routes 22, 57, 58, 60, and limited-stop routes 328 and 330. Community route 32 also serves the Plan Area. Rapid 522 has stops at Scott Boulevard, Bowers Avenue – Kiely Boulevard, and Lawrence Expressway. **Table 0-4** describes the service hours and route headways. **Figure 0-5** shows the existing transit services in the Plan Area, as well as the average weekday boardings and alightings that occurred in September 2017 at each stop.

Table 0-4: Existing Weekday Transit Service Summary				
Route	Description	Weekday Operating Hours	Average Daily Headway	Peak Headway
<i>Santa Clara Valley Transportation Authority (VTA) Bus</i>				
22	Palo Alto Transit Center to Eastridge Transit Center via El Camino	24 hours	15-60 minutes	15 minutes
32	San Antonio Shopping Center to Santa Clara Transit Center	Eastbound: 6:00 AM to 8:30 PM Westbound: 5:45 AM to 8:00 PM	30 minutes	30 minutes
57	West Valley College to Great America	Northbound: 5:30 AM to 11:00 PM Southbound: 6:15 AM to 10:30 PM	30-60 minutes	30 minutes

58	West Valley College to Alviso	Northbound: 6:00 AM to 7:00 PM Southbound: 6:15 AM to 8:15 PM	30-60 minutes	30 minutes
60	Winchester Transit Center to Great America	Northbound: 5:30 AM to 10:00 PM Southbound: 6:15 AM to 11:00 PM	15-60 minutes	15 minutes
328	Almaden Expwy & Camden to Lockheed Martin/Moffett Industrial Park	Northbound: 6:00 AM to 8:45 AM Southbound: 5:00 PM to 7:15 PM	60-75 minutes	60 minutes
330	Almaden Expwy & Camden to Tasman Drive	Northbound: 6:45 AM to 9:30 AM Southbound: 4:15 PM to 7:30 PM	30-60 minutes	30 minutes
Rapid 522	Palo Alto Transit Center to Eastridge Transit Center	Eastbound: 5:00 AM to 11:45 PM Westbound: 4:45 AM to 11:30 PM	10-20 minutes	10 minutes
<i>Source: VTA (2018).</i>				

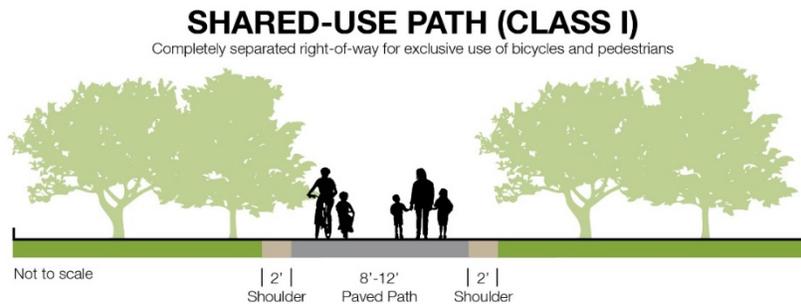
Stops along El Camino Real at Lawrence Expressway, Halford Avenue, Kiely Boulevard, Bowers Avenue, and Scott Boulevard are served by Route 22 and Rapid 522, and have the highest average weekday ridership compared to other stops.

Bicycle and Pedestrian Facilities

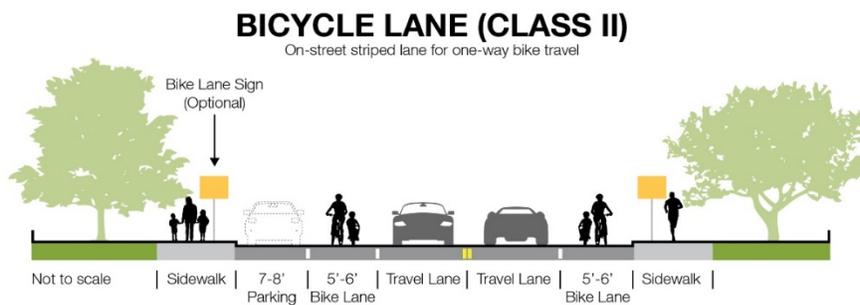
Bicycle Network

There are four distinct types of bikeway facilities¹:

- **Class I Bikeway (Bike Path):** Bike paths provide a completely separate right-of-way and are designated for the exclusive use of people riding bicycles and walking with minimal cross-flow traffic. In general, bike paths are along corridors not served by streets or where sufficient right-of-way exists to allow them to be constructed away from the influence of vehicles. Class I Bikeways can also offer opportunities not provided by the road system by serving as both recreational areas and/or desirable commuter routes.

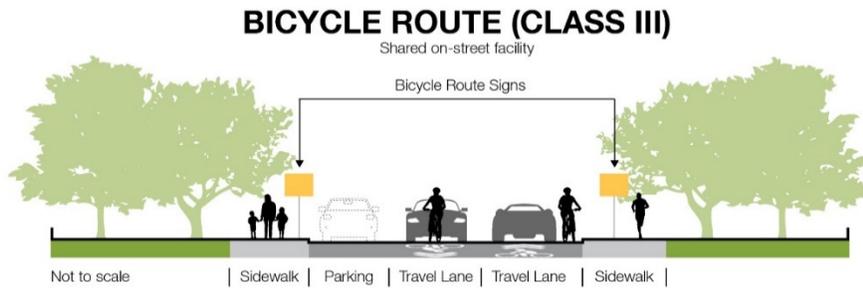


- **Class II Bikeway (Bike Lane):** Bike lanes provide designated street space for bicyclists, typically adjacent to the outer vehicle travel lanes. Bike lanes include special lane markings, pavement legends, and signage. Bicycle lanes are generally five (5) feet wide and wider lanes are desirable on roadways with high traffic volumes and/or high vehicle travel speeds. Bike lanes may be enhanced with painted buffers between vehicle lanes and/or parking, and green paint at conflict zones (such as driveways or intersections).

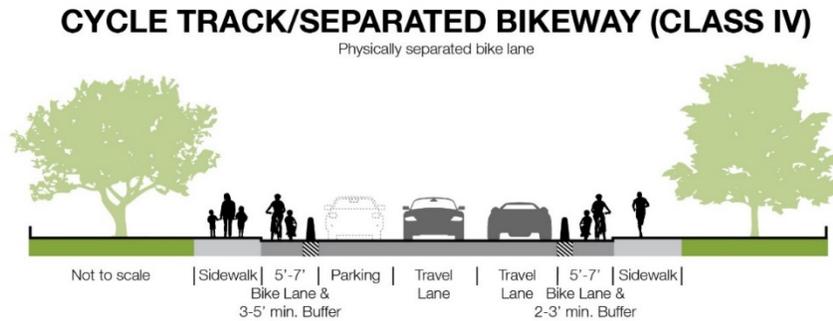


- **Class III Bikeway (Bike Route):** Bike routes provide enhanced mixed-traffic conditions for bicyclists through signage, striping, and/or traffic calming treatments, and to provide continuity to a bikeway network. Bike routes are typically designated along gaps between bike trails or bike lanes, or along low-volume, low-speed streets. Bicycle boulevards provide further enhancements to bike routes to encourage slow speeds and discourage non-local vehicle traffic via traffic diverters, chicanes, traffic circles, and/or speed tables. Bicycle boulevards can also feature special wayfinding signage to nearby destinations or other bikeways.

¹ Caltrans *Highway Design Manual* (Chapter 1000: Bikeway Planning and Design)



- Class IV Bikeway (Separated Bikeway):** Separated bikeways, also referred to as cycle tracks or protected bikeways, are bikeways for the exclusive use of bicycles which are physically separated from vehicle traffic. Separated bikeways were recently adopted by Caltrans in 2015. Types of separation may include, but are not limited to, grade separation, flexible posts, physical barriers, or on-street parking.

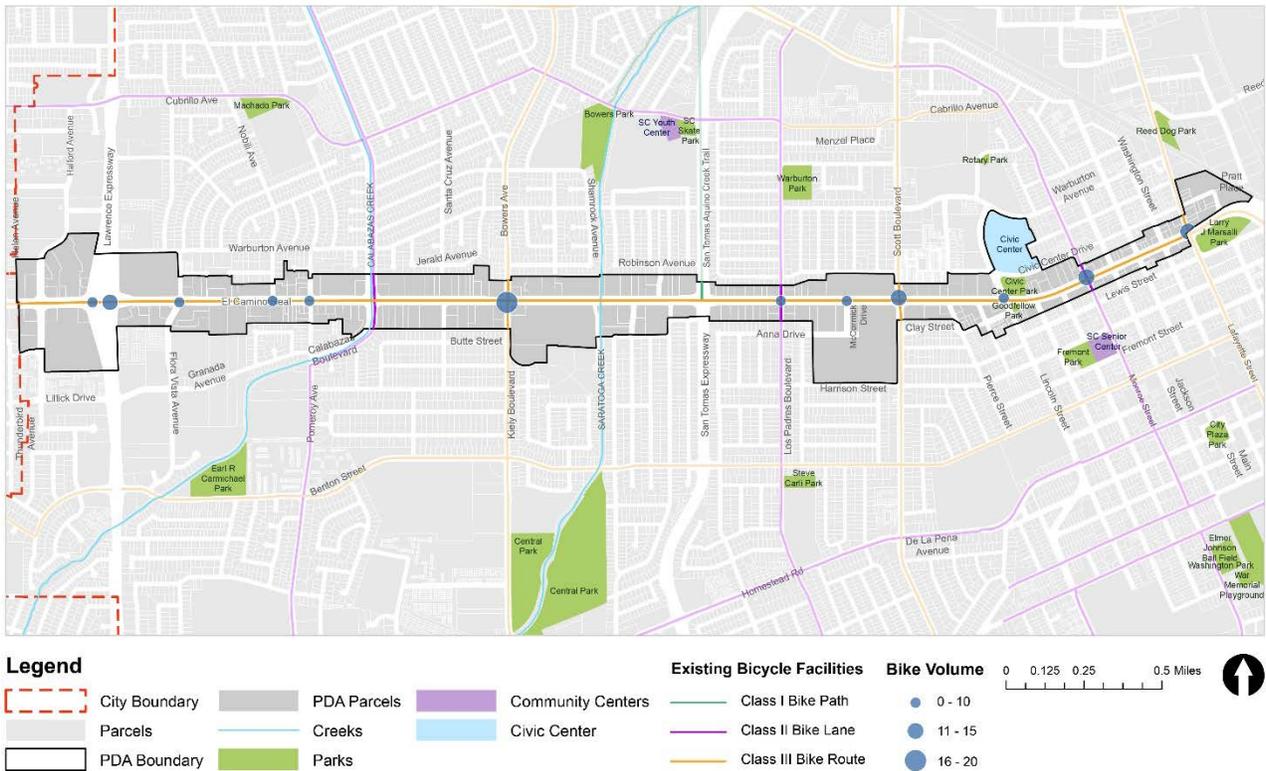


El Camino Real is a designated bike route in the County, though it is rated as “high caution” for cyclists. Bicycle facilities within and near the El Camino Real Specific Plan Area include a combination of bike paths (Class I), bike lanes (Class II), and bike routes (Class III). Figure 0-6 illustrates the location of bicycle facilities in the El Camino Real Specific Plan Area as well as bicycle volumes at several intersections.

The San Tomas Aquino Creek Trail bicycle path (Class I) is adjacent to San Tomas Expressway between El Camino Real and the Bay Trail located approximately 4.5 miles to the north. Bicycle lanes (Class II) are present along Monroe Street, Los Padres, and Calabazas Boulevard. Calabazas Boulevard, in particular, features enhanced buffered bike lanes that include green paint and bike boxes at the El Camino Real intersection. Several bicycle routes (Class III) exist within the Plan Area, notably Lafayette Street, Scott Boulevard, and Bowers Avenue. Bicycles are permitted on Lawrence Expressway and San Tomas Expressway.

Figure 0-6: Bicycle Network

El Camino Real Specific Plan Project Area : Bicycle Network



Proposed Bicycle Improvements

A bicycle route (Class III) is currently proposed along Lincoln Street from Warburton Avenue to Homestead Road.

Pedestrian Network

A mostly complete network of sidewalks, crosswalks, and shared use paths provides pedestrian connectivity within the El Camino Real Specific Plan Area. Signalized crossings on El Camino Real, which have pedestrian signals to provide safe pedestrian/bicycle crossings, are provided at numerous locations including Lafayette Street, Monroe Street, Lincoln Street, Scott Boulevard, Los Padres Boulevard, San Tomas Expressway, Bowe Avenue, Bowers Avenue – Kiely Boulevard, Calabazas Boulevard, Pomeroy Avenue, Nobili Avenue, Flora Vista Avenue, and Lawrence Expressway.

In addition, pedestrian hybrid beacons (PHBs) are located along El Camino Real at the intersections of Morse Lane, Buchanan Drive, and Alpine Avenue. PHBs consist of three signal indicators, with a circular yellow indication centered below two horizontally aligned circular red indications. The signal remains dark until a pedestrian pushing a button activates the system.

Figure 0-7 illustrates the existing pedestrian peak hour volumes at several intersections within the El Camino Real Specific Plan Area. **Table 0-5** includes the total crossing times and waiting times pedestrians would experience crossing El Camino Real at several intersections in the Plan Area based on the current signal timings at those locations.

Figure 0-7: Pedestrian Network

El Camino Real Specific Plan Project Area : Pedestrian Network

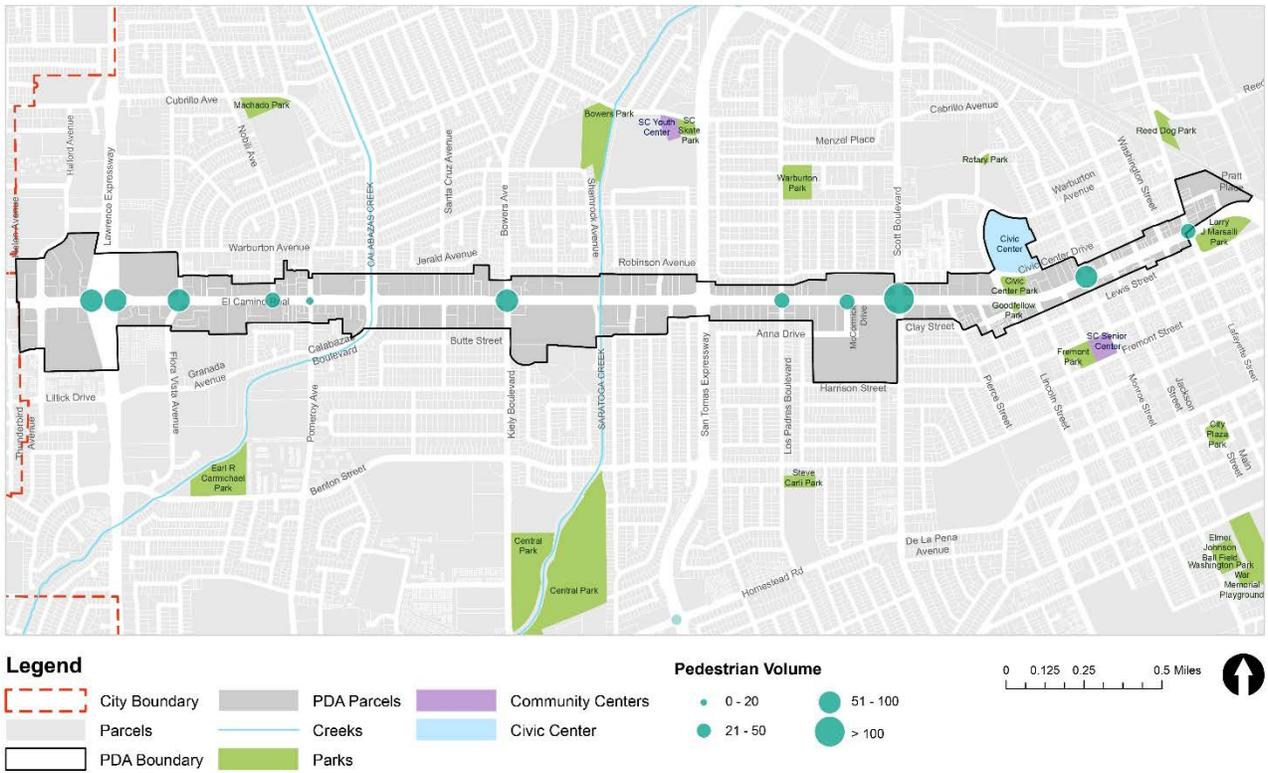


Table 0-5: Pedestrian Signal Crossing and Waiting Times

Intersection	Total Pedestrian Crossing Time (seconds)	Pedestrian Waiting Time (seconds) ¹
Los Padres Boulevard/El Camino Real	28	82
McCormick Drive/El Camino Real	35	56
Scott Boulevard/El Camino Real	29	102
Lincoln Street/El Camino Real	37	84
Monroe Street/El Camino Real	35	86
Lafayette Street/El Camino Real	28	143

Source: City of Santa Clara, 2017.

Notes:

1. Pedestrian waiting time is total cycle length minus pedestrian crossing times

Volumes

Table 0-6, as well as **Figure 0-6** and **Figure 0-7** shown previously, presents the peak hour bicycle and pedestrian volumes at some of the intersections in the Plan Area. Intersections with the largest number of bicycle trips during the evening peak hours are located at Bowers Avenue – Kiely Boulevard, Monroe Street, Lafayette Street, Lawrence Expressway on- and off-ramps, and Scott Boulevard. In addition, pedestrian volumes are largest at the Scott Boulevard, Bowers Avenue – Kiely Boulevard, and Flora Vista Avenue intersections during the evening peak.

Table 0-6: Peak Hour Bicycle and Pedestrian Volumes			
Intersection	Peak Hour Period	Bicycle Volumes	Pedestrian Volumes
Lawrence Expressway (SB Ramps)/El Camino Real	PM	8	55
Lawrence Expressway (NB Ramps)/El Camino Real	PM	12	56
Flora Vista Avenue/El Camino Real	PM	1	65
Nobili Avenue/El Camino Real	PM	8	22
Pomeroy Avenue/El Camino Real	PM	10	17
Bowers Avenue-Kiely Boulevard/El Camino Real	PM	17	92
Los Padres Boulevard/El Camino Real	PM	8	33
McCormick Drive/El Camino Real	PM	1	38
Scott Boulevard/El Camino Real	PM	12	140
Lincoln Street/El Camino Real	PM	10	0
Monroe Street/El Camino Real	PM	14	51
Lafayette Street/El Camino Real	PM	11	36

Source: City of Santa Clara, 2016.

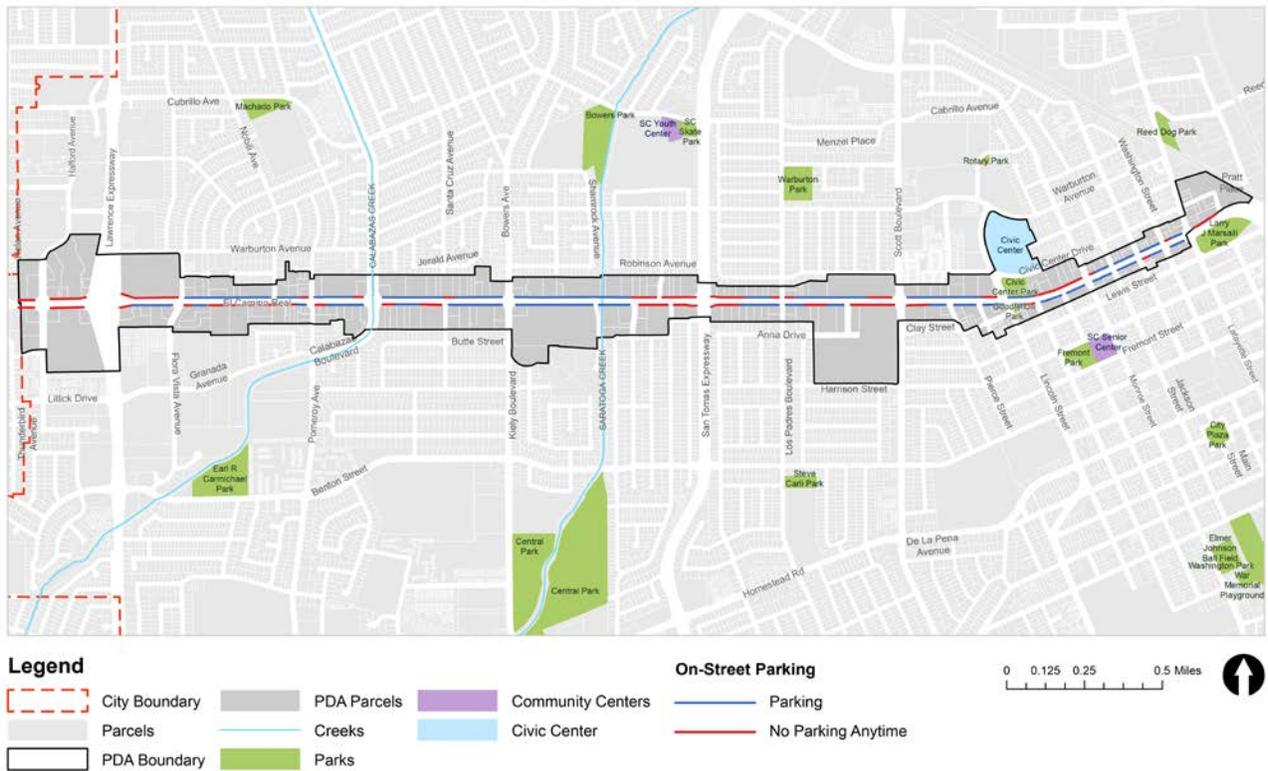
Parking Facilities

Parking Supply

Figure 0-8 shows the locations of on-street parking and parking restrictions along El Camino Real in the Plan Area. Portions of El Camino Real allow vehicles to park, while other locations restrict parking completely. To prevent long-term and overnight parking, several portions of El Camino Real have parking restriction where parking is prohibited from 9:30 PM to 3:30 AM. Public and private parking, while not shown here, is also available on nearby streets as well as at commercial and residential uses in the area.

Figure 0-8: Locations of On-Street Parking

El Camino Real Specific Plan Project Area : On-Street Parking

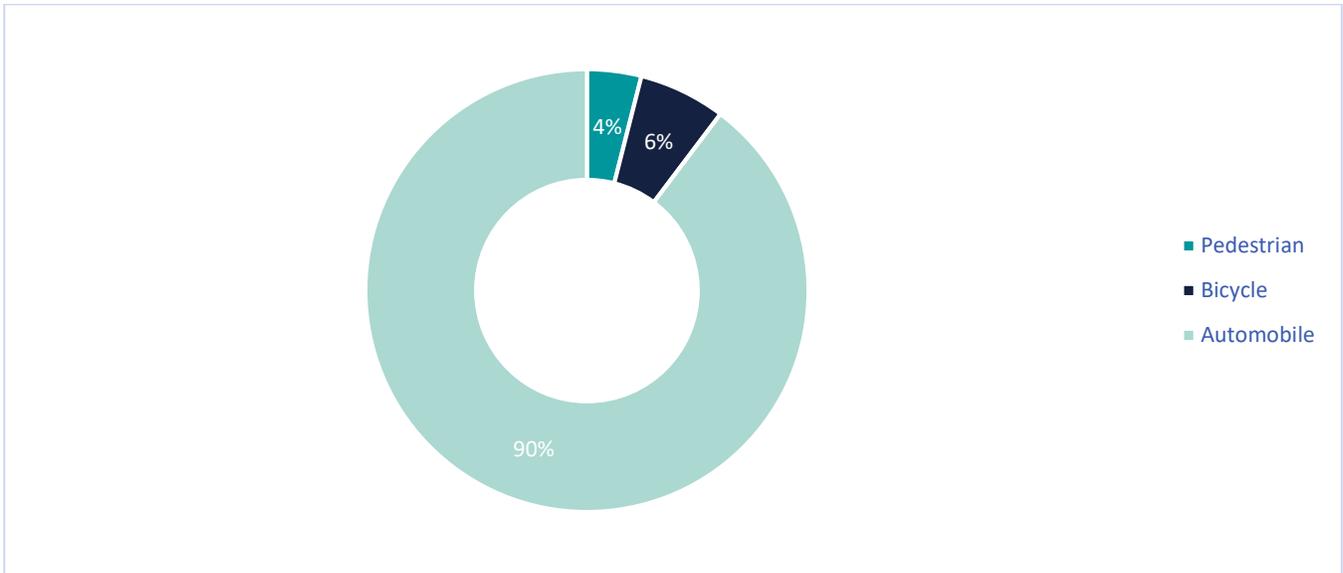


Collision Trends and Locations (2012 through 2016)

Collision data by travel mode between January 2012 and December 2016 (the most recently available five-year period) was analyzed to inform trends in pedestrian, bicycle, and vehicle safety². **Figure 0-9** and **Figure 0-10** show a comparison between the percentage of people involved in collisions and those with serious injuries (there were no fatalities reported from 2012 through 2016) by mode. Bicyclists and pedestrians are overrepresented in collisions resulting in a severe injury; pedestrians and bicyclists are involved in approximately 10% of all reported collisions, but account for more than half of all reported serious injuries. In terms of how people choose to travel in the Plan Area, those who walk or ride bicycles are at the greatest risk to be seriously injured or killed in a traffic collision.

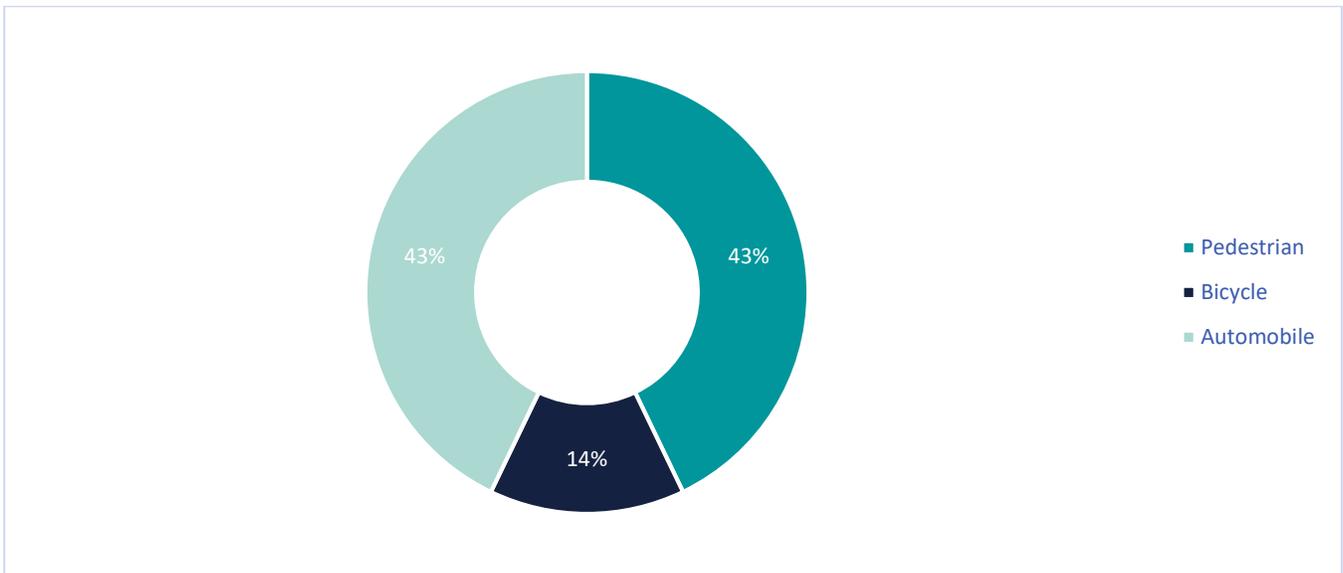
² This analysis is intended to serve as a high-level review to identify general collision trends in the El Camino Real Specific Plan Area. Additional collision analyses would be needed to establish appropriate countermeasures.

Figure 0-9: People Involved in Collisions



Source: Statewide Integrated Traffic System (SWITRS) database, January 1, 2012-December 31, 2016.

Figure 0-10: People Severely Injured by Mode

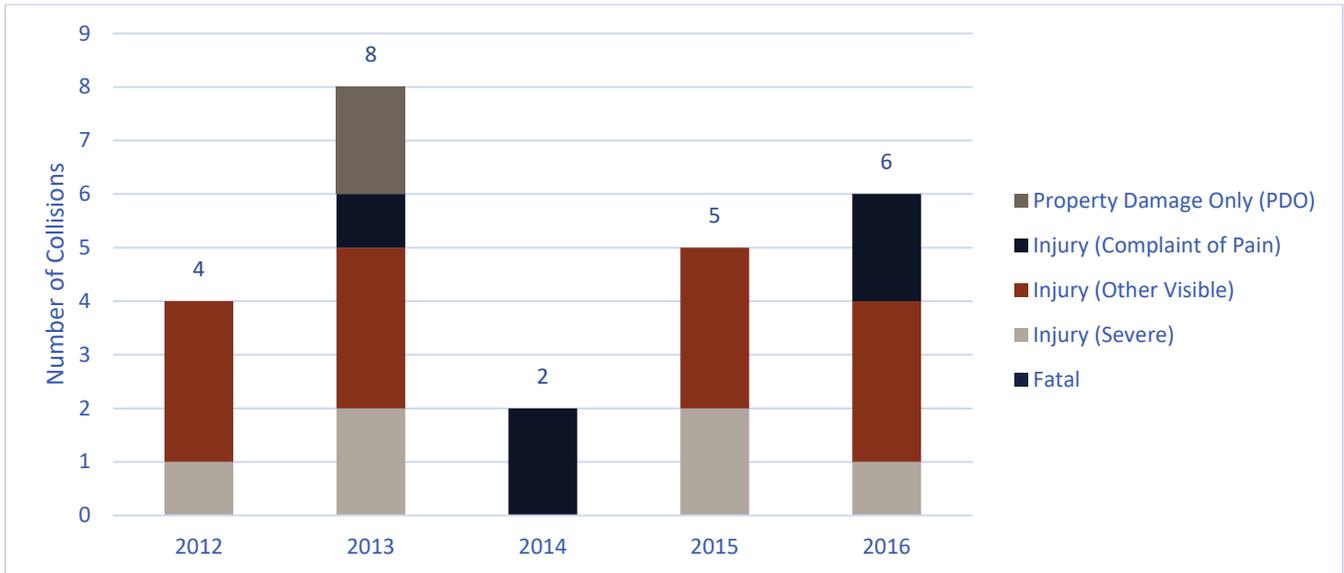


Source: Statewide Integrated Traffic System (SWITRS) database, January 1, 2012-December 31, 2016.

Pedestrian Collisions

Figure 0-11 shows the pedestrian collision trends from 2012 through 2016 by year and collision severity. On average, there were five collisions involving a pedestrian each year, which is about 4% of all reported collisions in the El Camino Real Specific Plan Area. Of the pedestrian collisions, around 24% resulted in a severe injury; there were no fatalities over the five-year study period.

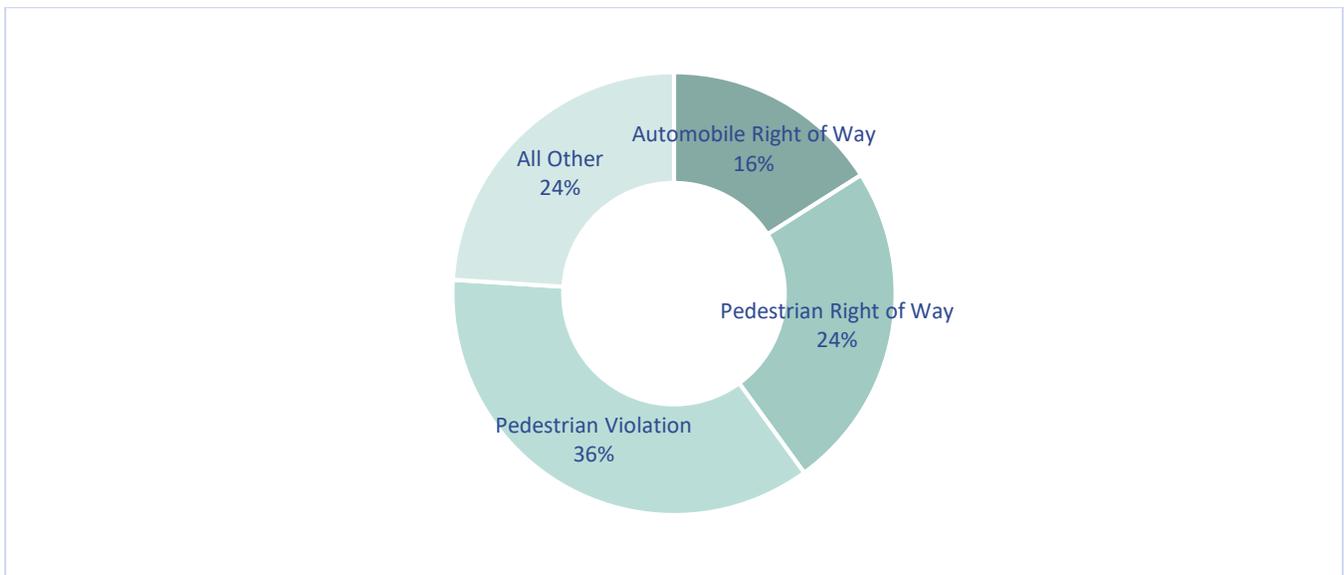
Figure 0-11: Pedestrian Collision Trends (2012 – 2016)



Source: Statewide Integrated Traffic System (SWITRS) database, January 1, 2012-December 31, 2016.

Pedestrian violation and pedestrian right of way were the common factors in about half of all collisions involving a pedestrian (see **Figure 0-12**). Automobile right of way was the next most common primary factor.

Figure 0-12: Primary Pedestrian Collision Factors

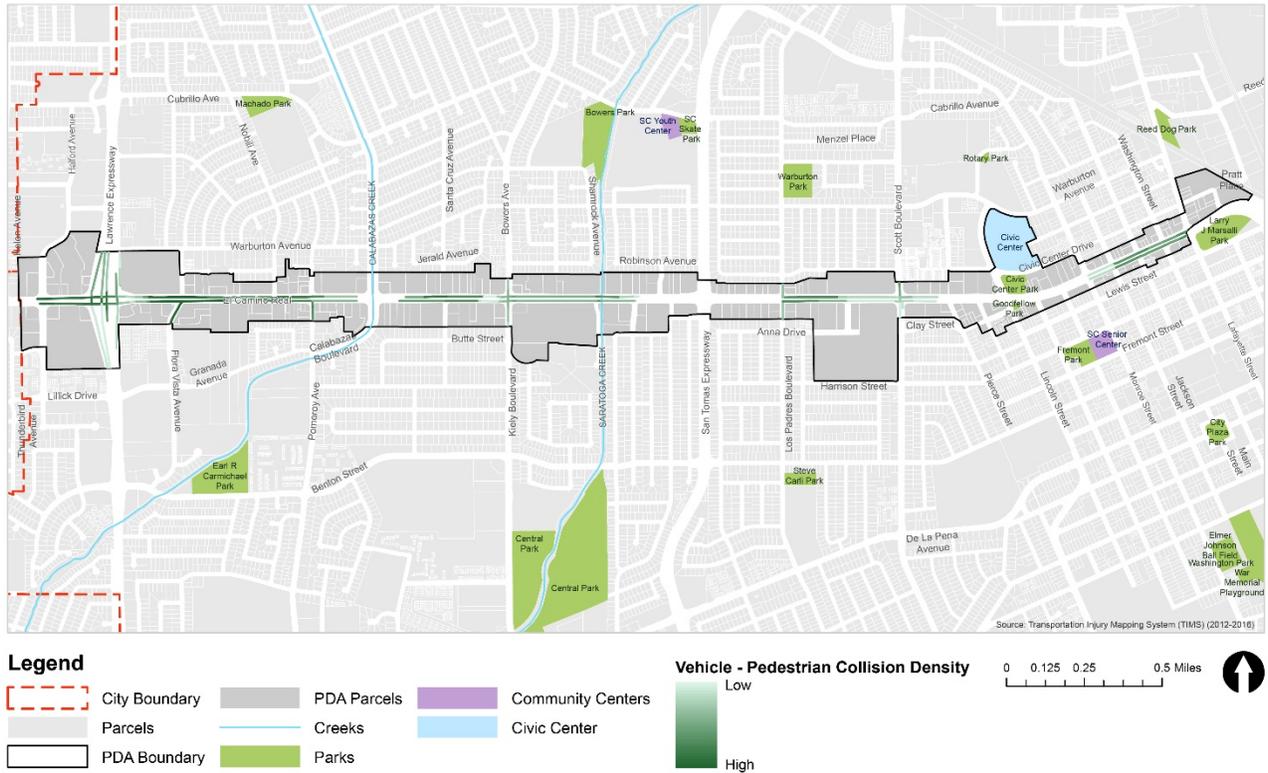


Source: Statewide Integrated Traffic System (SWITRS) database, January 1, 2012-December 31, 2016.

Figure 0-13 shows the frequency of reported collisions involving a pedestrian in the El Camino Real Specific Plan Area. Segments of El Camino Real from Lafayette Street to Jackson Street, Kiely Boulevard to Calabazas Boulevard, Pomeroy Avenue across Lawrence Expressway to Halford Avenue, as well as the near Los Padres Boulevard and Bowe Avenue intersections, stand out as having the highest frequencies of pedestrian collisions compared to the rest of the Plan Area.

Figure 0-13: Vehicle – Pedestrian Collision Locations (2012 – 2016)

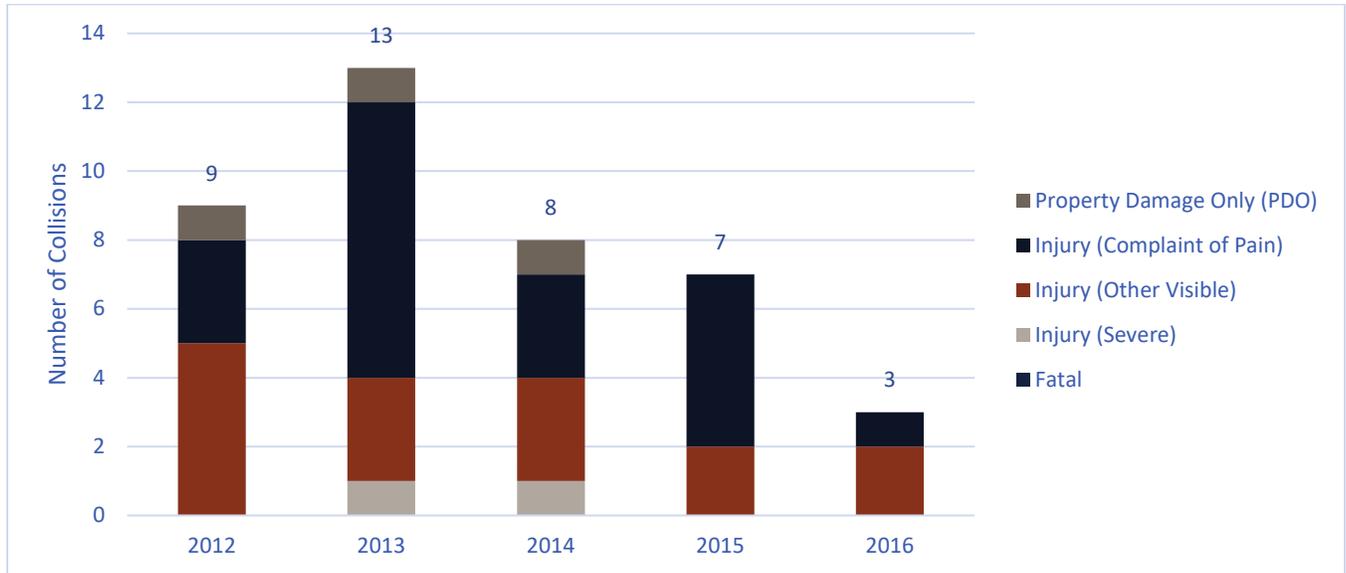
El Camino Real Specific Plan Project Area : Vehicle - Pedestrian Collision Locations (2012 – 2016)



Bicycle Collisions

Figure 0-14 shows the bicycle collision trends between 2012 and 2016 by year and collision severity. On average, there were eight collisions involving a bicyclist each year, which is around 6% of all reported collisions in the El Camino Real Specific Plan Area. Of the collisions involving cyclists, approximately 5% resulted in a severe injury; there were no fatalities over the five-year study period. On average, there were slightly more reported bicycle collisions than reported pedestrian collisions.

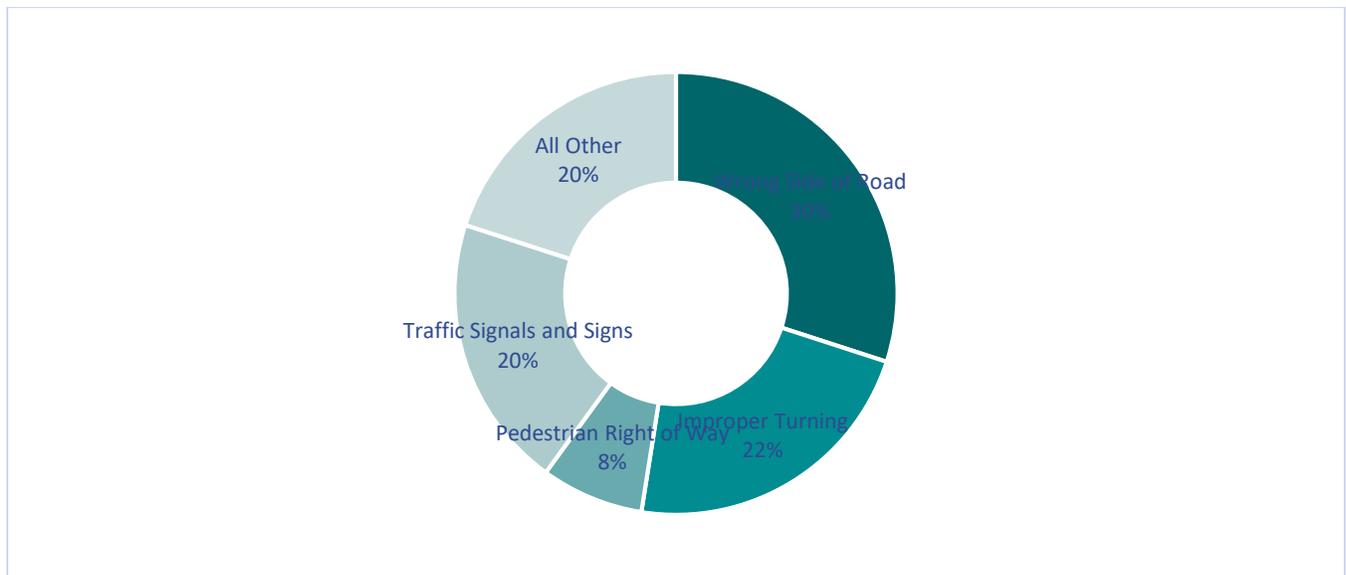
Figure 0-14: Bicycle Collision Trends (2012 – 2016)



Source: Statewide Integrated Traffic System (SWITRS) database, January 1, 2012-December 31, 2016.

Taking a closer look at the cause of bicycle collisions (see **Figure 0-15**), cyclists riding on the wrong side of the road was the primary collision factor in just under a third of reported collisions. The other most common reported collision factors were improper turning movements, traffic signals/signs violations, and pedestrian right of way.

Figure 0-15: Primary Bicycle Collision Factors

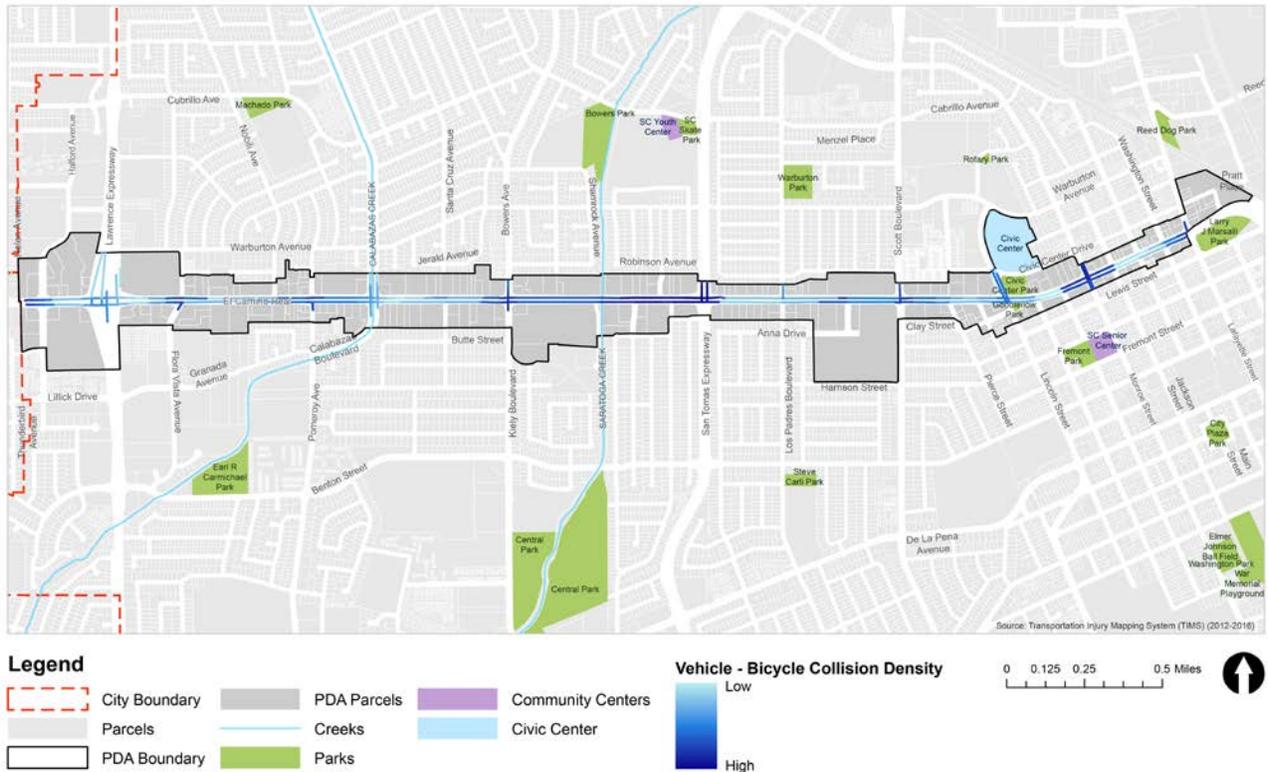


Source: Statewide Integrated Traffic System (SWITRS) database, January 1, 2012-December 31, 2016.

Figure 0-16 shows the frequency of reported collisions involving a bicyclist in the El Camino Real Specific Plan Area. Segments of El Camino Real from San Thomas Expressway to Kiely Boulevard, and the intersections of Lafayette Street, Monroe Street, Scott Boulevard, Pomeroy Avenue, Flora Vista Avenue and Halford Avenue stand out as having the highest frequencies of bicycle collisions compared to the rest of the El Camino Real Specific Plan Area.

Figure 0-16: Vehicle – Bicycle Collision Locations (2012 – 2016)

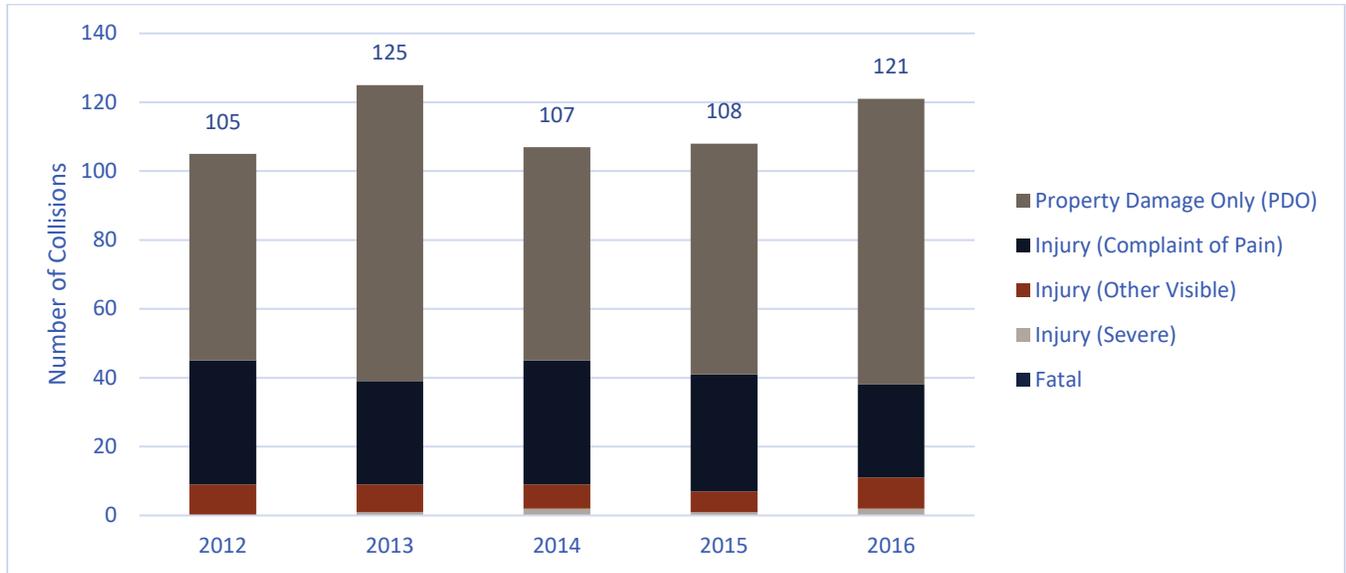
El Camino Real Specific Plan Project Area : Vehicle - Bicycle Collision Locations (2012 – 2016)



Automobile Collisions

Figure 0-17 shows the auto-only collision trends between 2012 and 2016 by year and collision severity. On average, there were just over 110 auto-only collisions reported each year, which is approximately 90% of all reported collisions in the El Camino Real Specific Plan Area. Of the collisions only involving automobiles, just over 1% resulted in a severe injury; there were no fatalities over the five-year study period. As expected, there were more auto-only collisions reported annually compared to the number of bicycle and pedestrian collisions combined. The total number of reported auto-only collisions varied year by year.

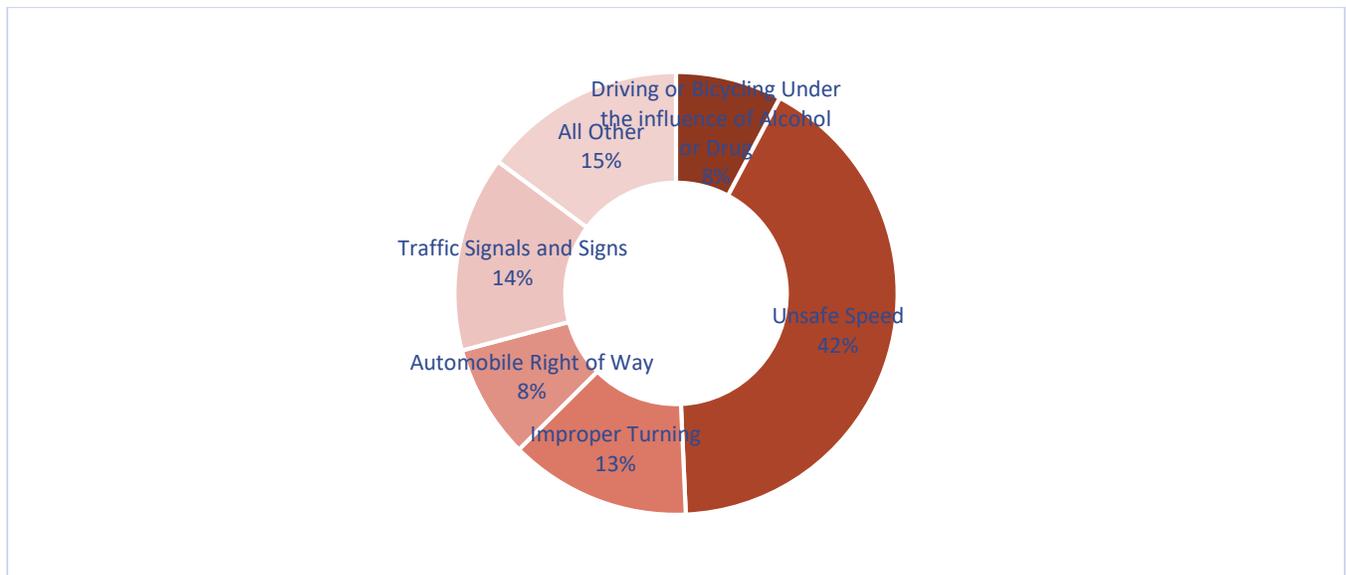
Figure 0-17: Automobile Collision Trends (2012 – 2016)



Source: Statewide Integrated Traffic System (SWITRS) database, January 1, 2012-December 31, 2016.

Unsafe travel speed was the primary collision factor in over 40% of reported auto-only collisions (see **Figure 0-18**). Improper turning movements, traffic signal/sign violations, failure to yield to automobile right of way, and operating a vehicle under the influence of drugs or alcohol were the next most common factors.

Figure 0-18: Primary Automobile Collision Factors

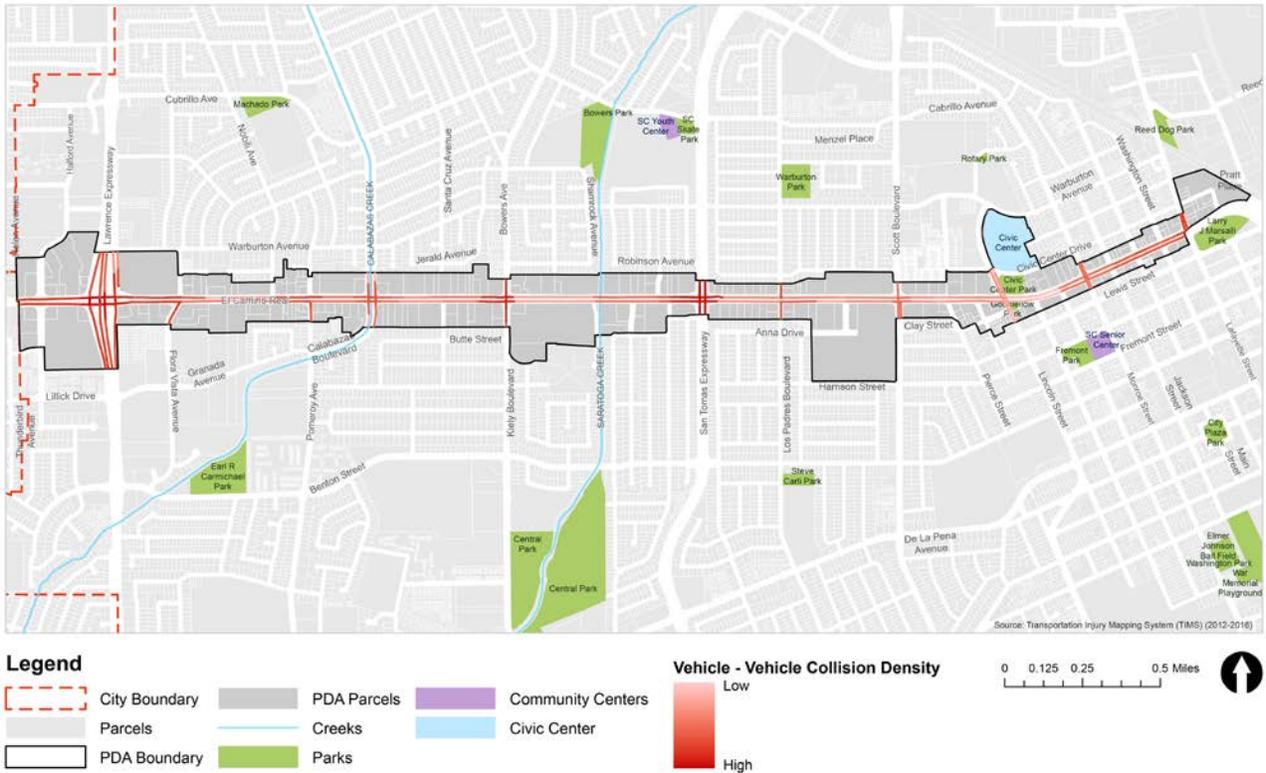


Source: Statewide Integrated Traffic System (SWITRS) database, January 1, 2012-December 31, 2016.

Figure 0-19 illustrates the frequency of reported auto-only collisions in the El Camino Real Specific Plan Area. The intersections of El Camino Real and San Tomas Expressway, Kiely Boulevard, and Lawrence Expressway stand out as having the highest number of auto-only collisions compared to the rest of the Plan Area.

Figure 0-19: Vehicle – Vehicle Collision Locations (2012 – 2016)

El Camino Real Specific Plan Project Area : Vehicle - Vehicle Collision Locations (2012 – 2016)



Vehicle Miles Travelled (VMT) Estimates

The City of Santa Clara adopted their Climate Action Plan (CAP) in December 2013 and included it as part of the Appendix to their 2010-2035 General Plan. The CAP outlines the City’s path towards creating a more sustainable, healthy and livable community by reducing greenhouse gas (GHG) emissions and providing energy, fuel and monetary savings while improving quality of life for the community. GHG emission estimates were developed for on-road transportation using vehicle miles traveled (VMT), which is a measurement of miles traveled by vehicles within a specific region over a certain amount of time.

Santa Clara’s Travel Demand Model was used to estimate VMT in the community in 2008 and in 2035 with the implementation of the General Plan. During this process, the City of Santa Clara determined which traffic analysis zones (TAZs) would be included in the calculation of VMT. The City established four transportation districts, one of which, District 3: El Camino Real Corridor, matches the boundary of the El Camino Real Specific Plan Area. Daily VMT estimates for the year 2008 and 2035 per service population, which includes both jobs and residential, for the El Camino Real Corridor is presented in **Table 0-7**.

Table 0-7: El Camino Real Corridor Daily VMT Estimates¹		
Transportation District	Existing Conditions (2008)	2010 General Plan (2035)
VMT per Service Population	13.8	13.4
<p><i>Notes:</i></p> <p>1. <i>Daily VMT from City of Santa Clara travel model before TDM policy quantification. Land use and transit policies included in daily VMT estimate.</i></p> <p><i>Source: Fehr & Peers, 2013.</i></p>		