

San Diego Regional Economic Prosperity Strategy



Transportation: Helping Address the Three E's



Prosperity Strategy Identifies Three Major Challenges

- Quality of job growth
- Widening wage gap
- High cost of living

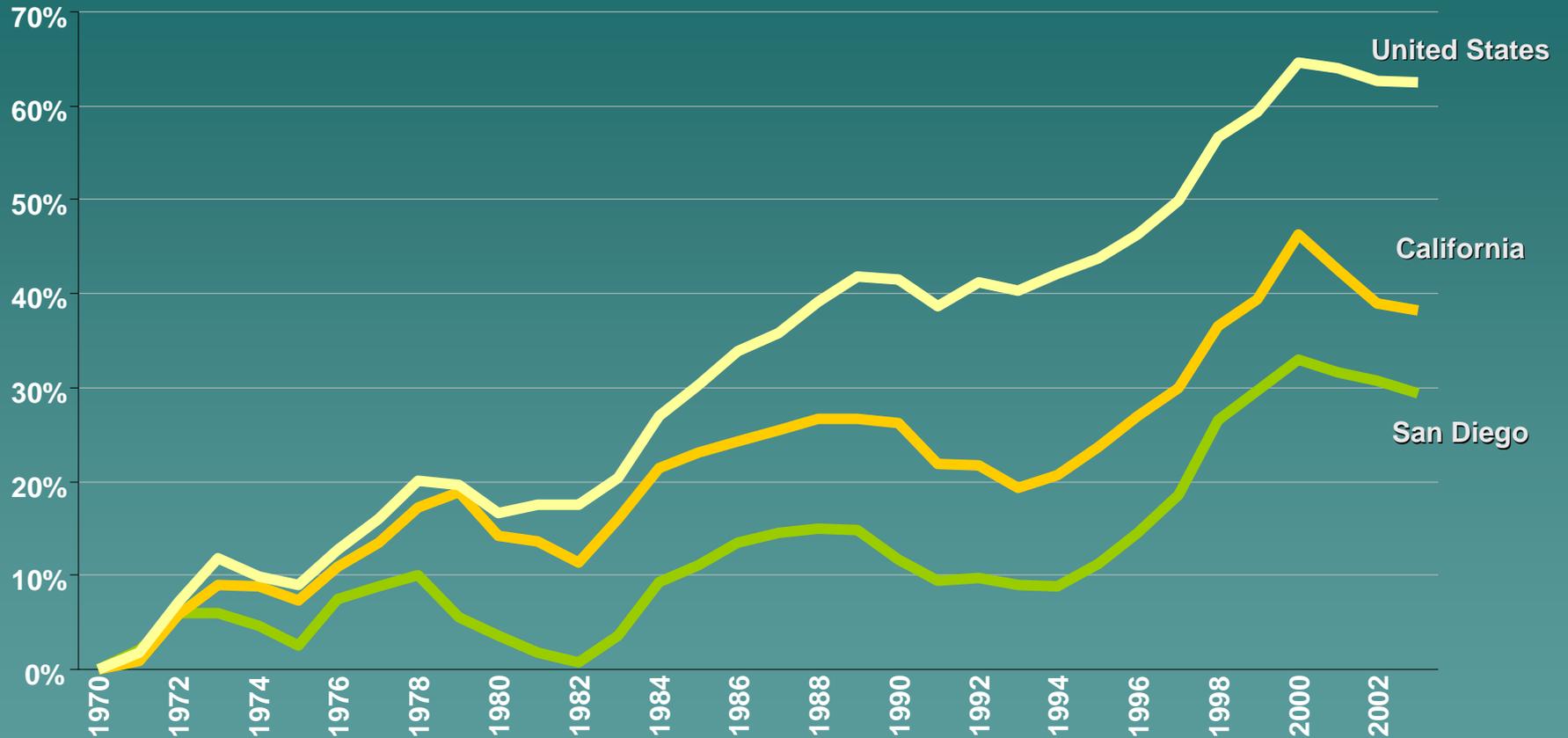
Economy Has Created 8 Times More Low than High Paying Jobs

Unbalanced Job Growth Affects Distribution of Wages

	1990-2004 Growth		
<i>Compensation Category / Median Wage (\$2004)</i>	<i>Average Salary Increase (\$2004)</i>	<i>Real Salary Growth '90-'04</i>	<i>Job Growth</i>
Highest Paying Jobs (Top 1/3) / \$79,800	\$19,977	33.4%	20,280
Mid Level Paying Jobs (Middle 1/3) / \$51,000	\$8,208	19.2%	57,310
Low Level Paying Jobs (Lowest 1/3) / \$24,500	\$2,000	8.9%	158,400

We Are Falling Behind the State and Nation

Growth in Real Per Capita Income Not Keeping Pace



Which Jobs Influence Economic Growth Most?

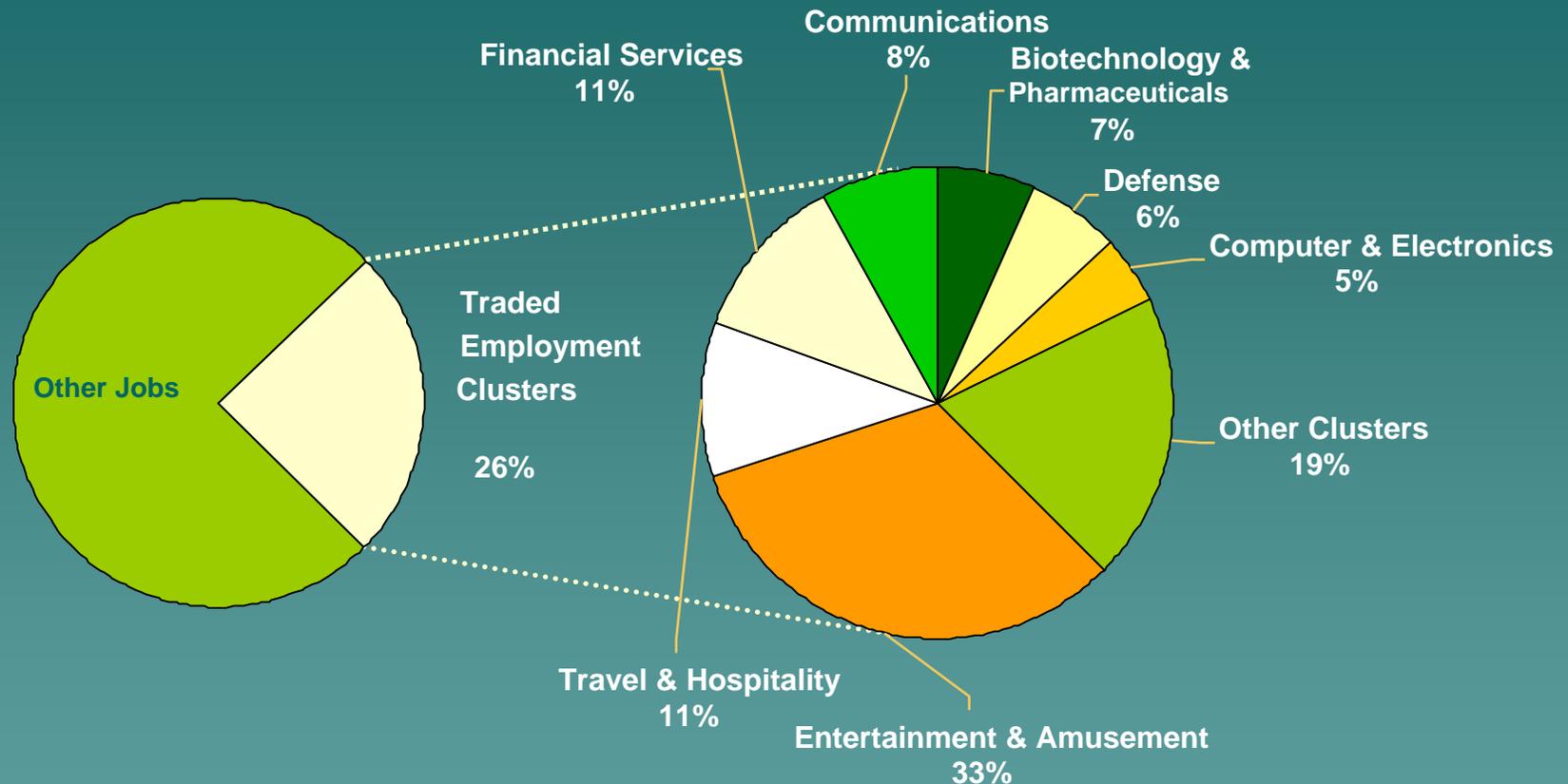
- Export Oriented
- Unconstrained Market Potential

16 Traded Employment Clusters Drive Our Economy

- Biomedical Products
- Biotechnology
- Communications
- Computer Electronics
- Defense & Transportation
- Design Services
- Entertainment
- Environmental Technology
- Financial Services
- Fruits & Vegetables
- Horticulture
- Publishing Services
- Recreational Goods
- Software
- Specialty Foods
- Travel and Hospitality

Proportion of Jobs in Each “Driving” Employment Cluster-2005

(Traded Clusters Set the Pace of Economic Growth)



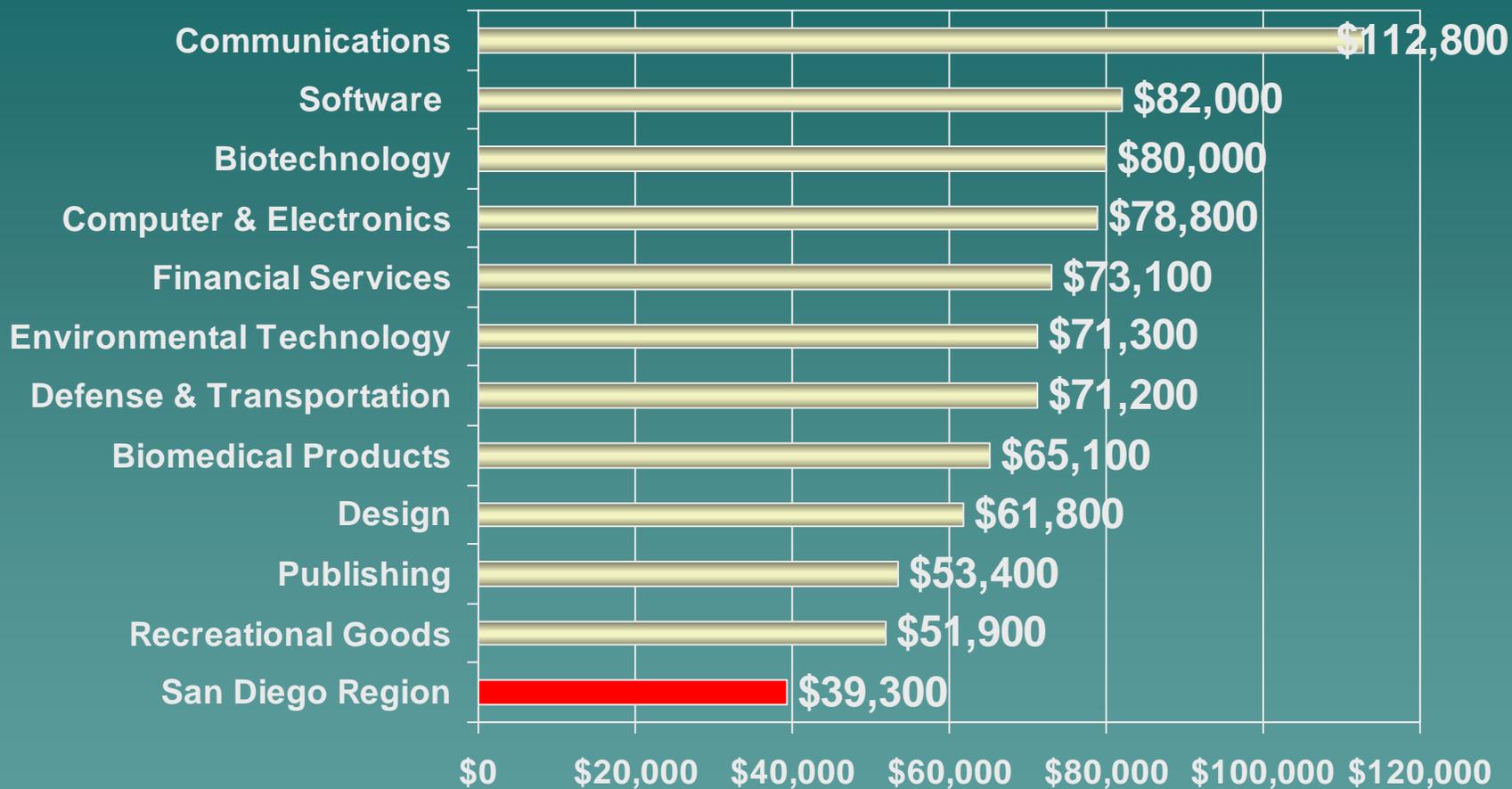
Low Paying “Driving” Cluster Industries

(Clusters with Average Wage Less than Region’s, \$2004)



High Paying “Driving” Cluster Industries

(Clusters with Average Wage Greater than Region’s, \$2004)





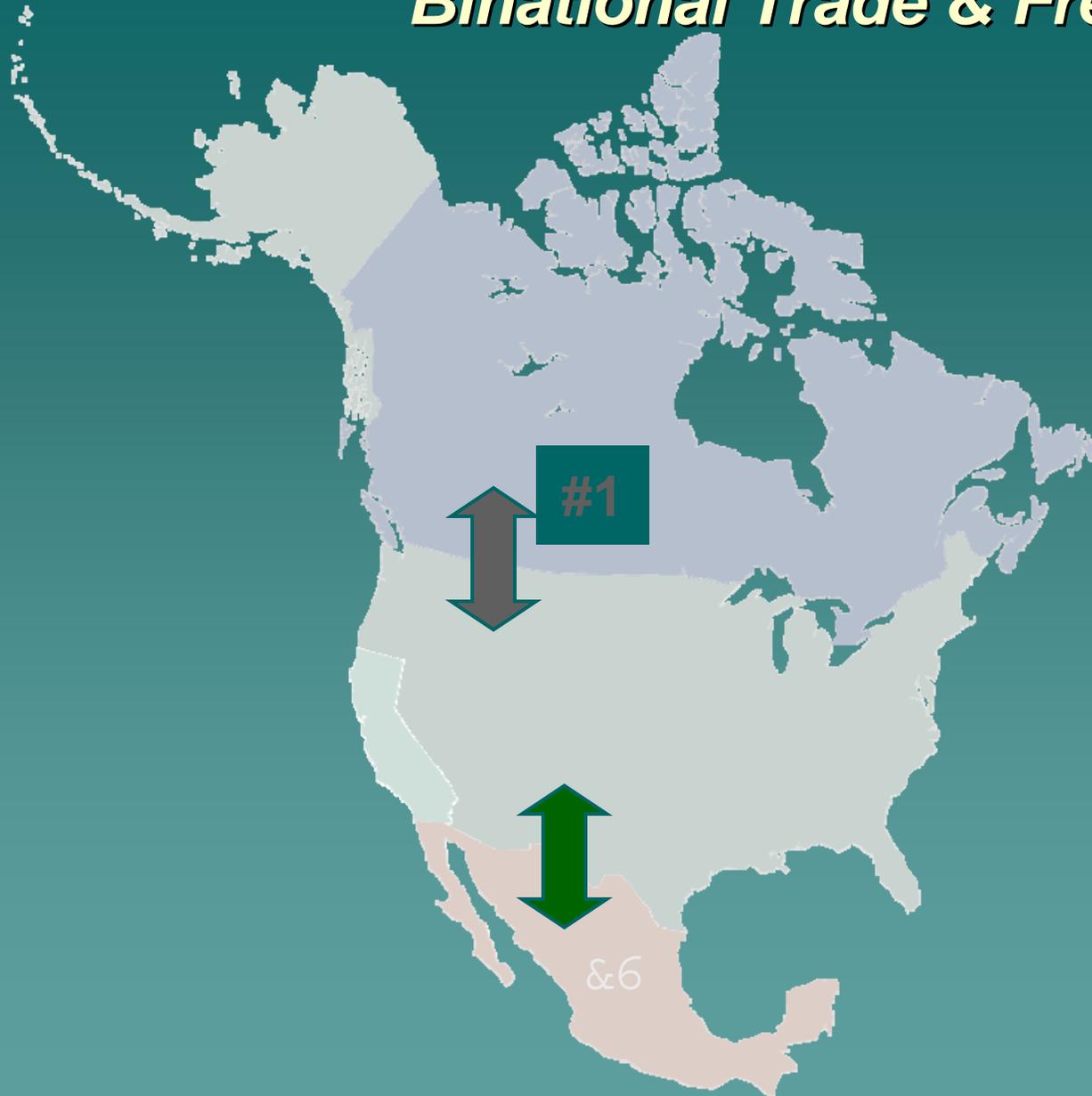
*Estimating Economic Impacts
of
Border Wait Times
in the
San Diego-Baja California Region*

January 2008



Binational Trade & Freight Facts

Mexico is the United States' third largest trading partner. - 9% of U.S. - Mexico trade value crosses at Otay Mesa and Tecate.

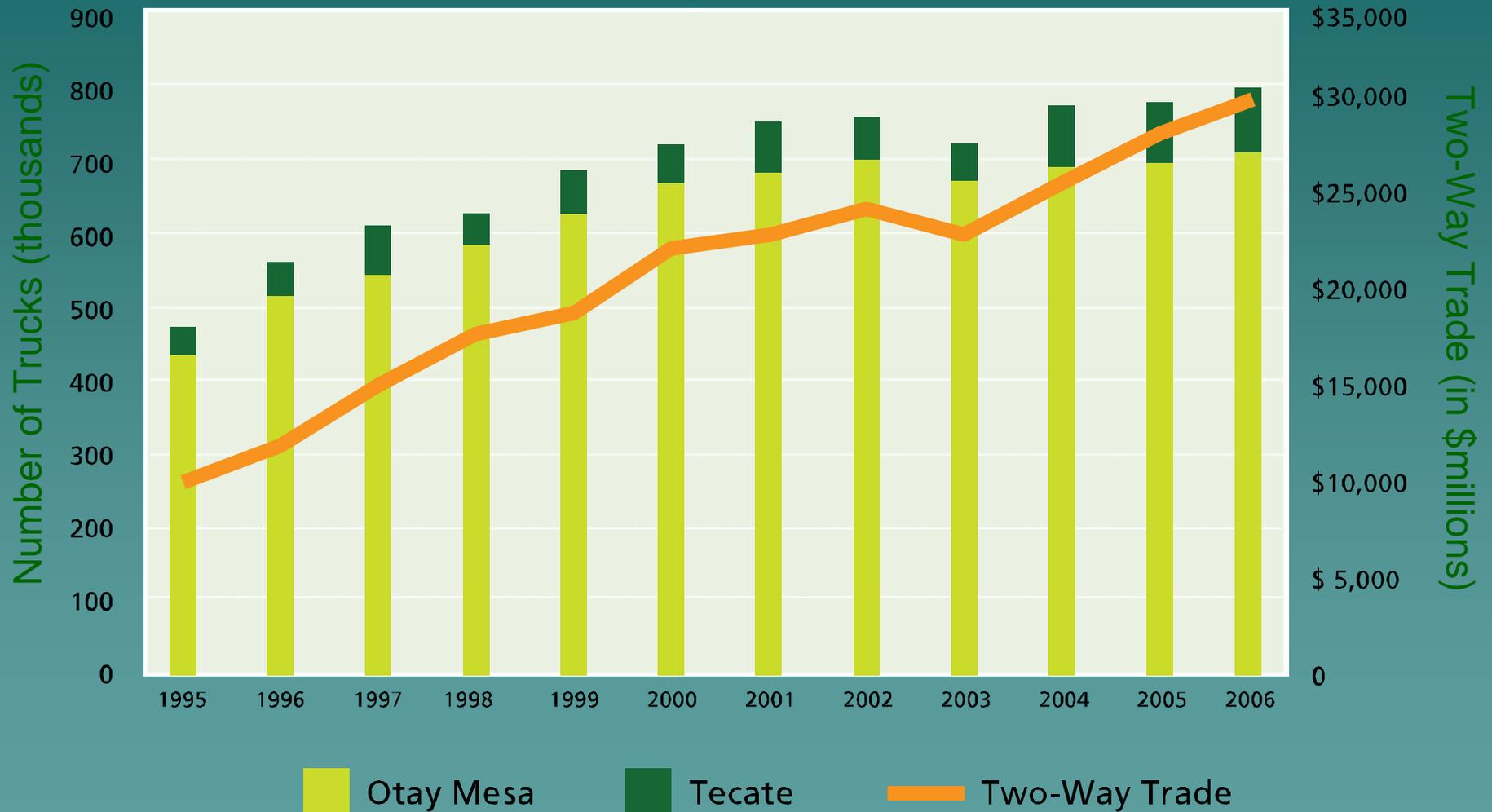


Binational Trade & Freight Facts



Value of Trade Passing Through SD POE's Rising Faster than GRP

Northbound Truck Crossings Otay Mesa & Tecate POEs



San Diego-Baja California POEs: Current Conditions



San Ysidro

Cross-Border Personal Travel

Combined Regional Economic Impacts (San Diego County & Baja California)

Impact Category	Total Annual Impact (2007)
Output (millions of U.S. dollars)	-\$2,989
Labor Income (millions of U.S. dollars)	-\$1,256
Employment (FTE jobs)	-40,450



Otay Mesa Commercial POE Current Conditions



Economic Impacts due to Cross-Border Freight Delay



Impact Category	2007 Total Annual Impact (U.S. \$ in millions)				
	<u>San Diego County</u>	<u>California</u>	<u>United States</u>	<u>Baja California</u>	<u>Mexico</u>
Output	-\$ 539	-\$ 847	-\$ 1,487	-\$ 1,560	-\$ 2,451
Labor Income	-\$ 155	-\$ 241	-\$ 415	-\$ 178	-\$ 280
Employment (FTE jobs)	-2,912	-4,323	-9048	-8,207	-12,897

Lost Economic Benefits San Diego-Baja California Personal Travel and Freight Movements (2007)

\$5.1 Billion in Lost Output =

3 1/2 San Diego
Convention
Centers

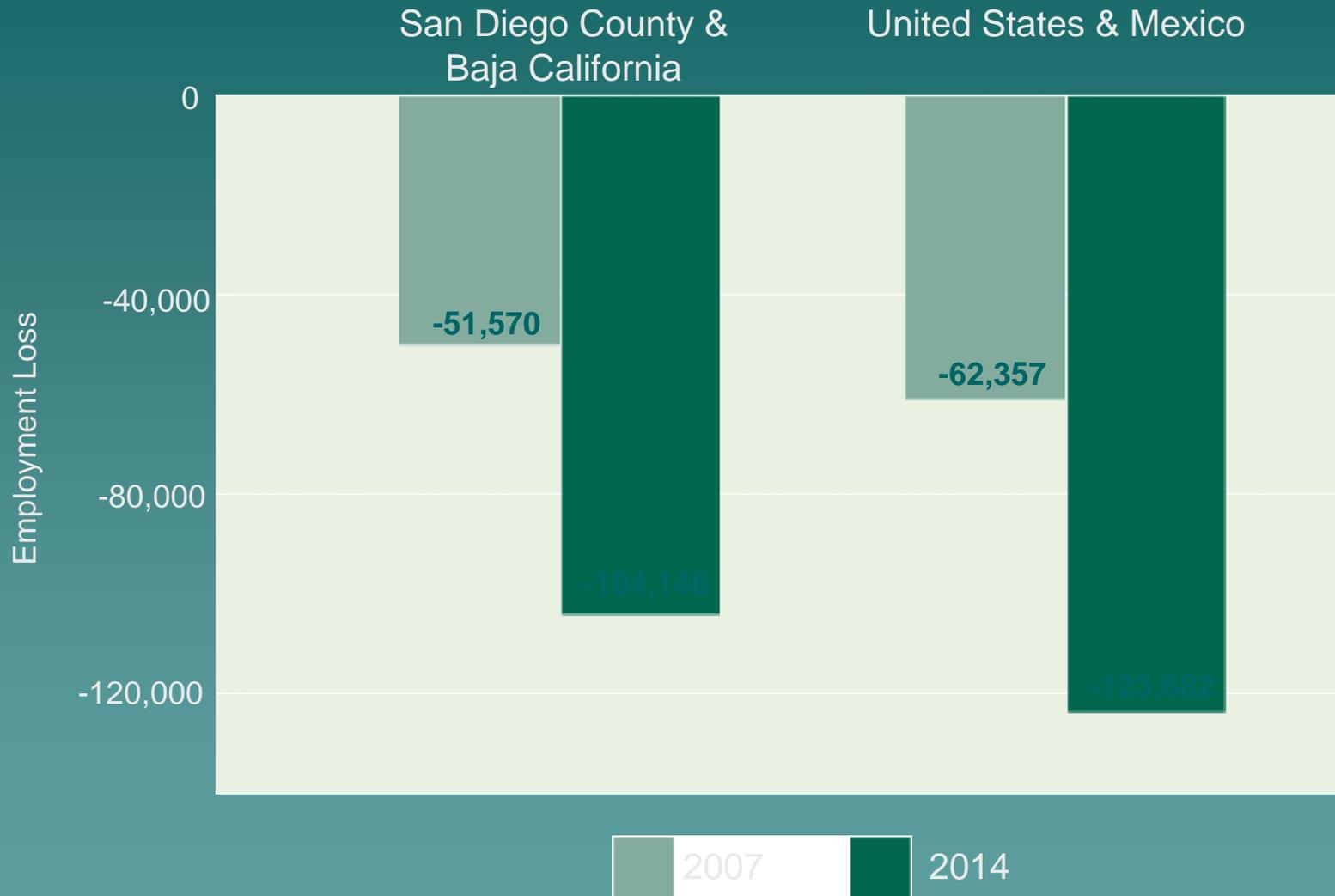


51,570 Lost Jobs =

8.5 Qualcomm
Companies



Projected Employment Impact of Border Delay Personal Travel and Freight Movements (2007)





*2030 Regional
Transportation Plan: Pathways for
the Future*

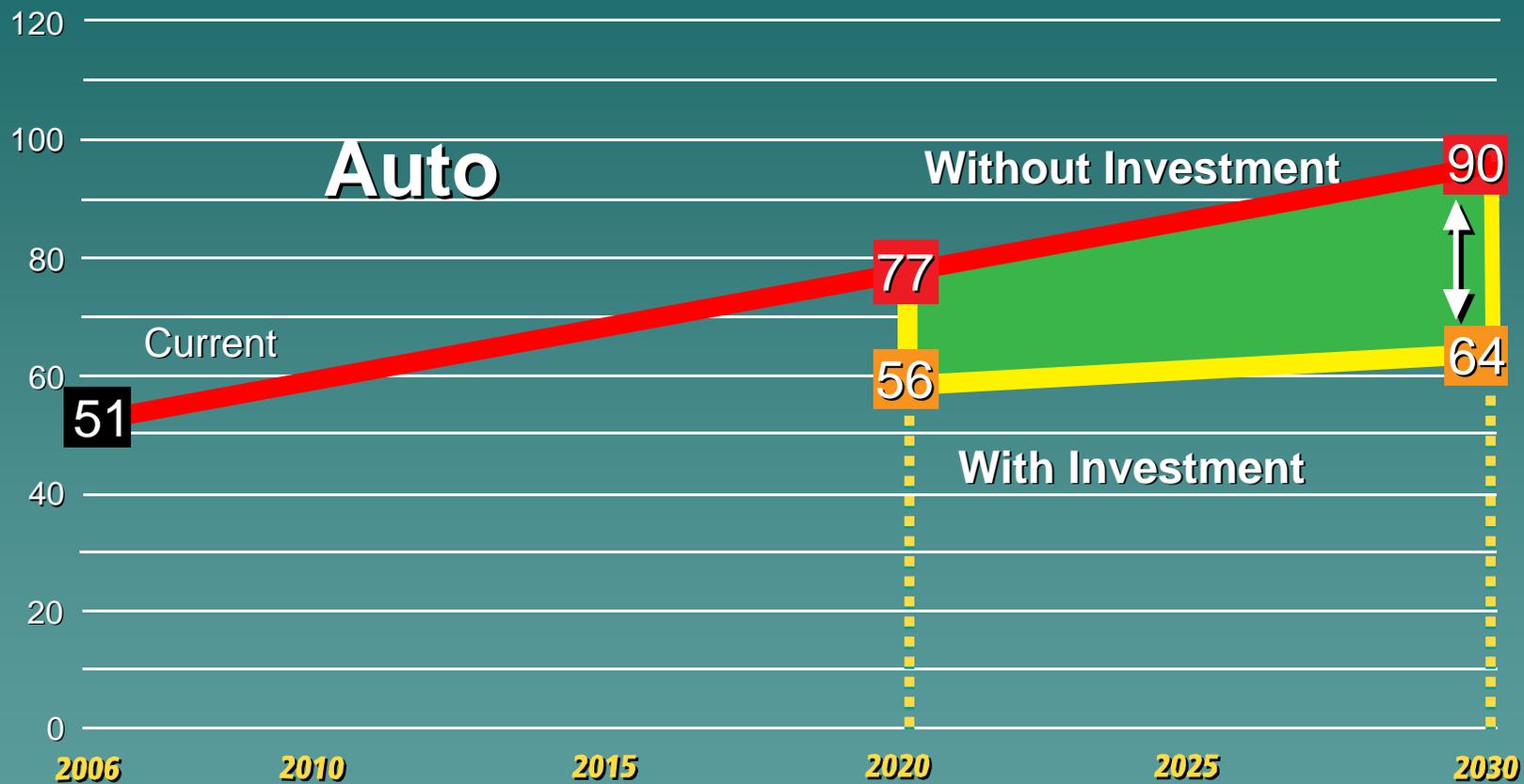


A million new residents by 2030



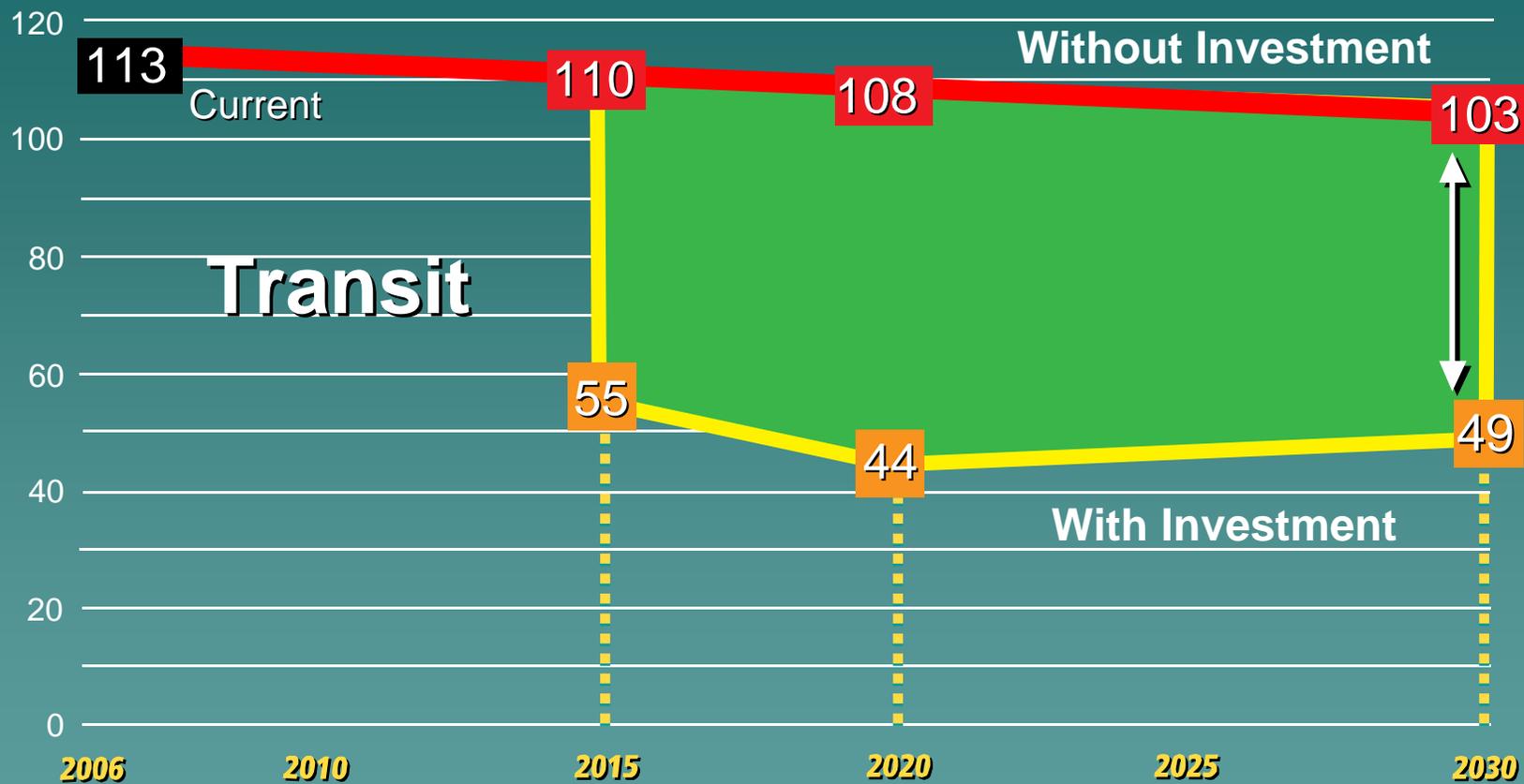
A half million new jobs

Chula Vista to Sorrento Valley Travel Time



Average Travel Time, Door-to-Door (In Minutes)

Chula Vista to Sorrento Valley Travel Time



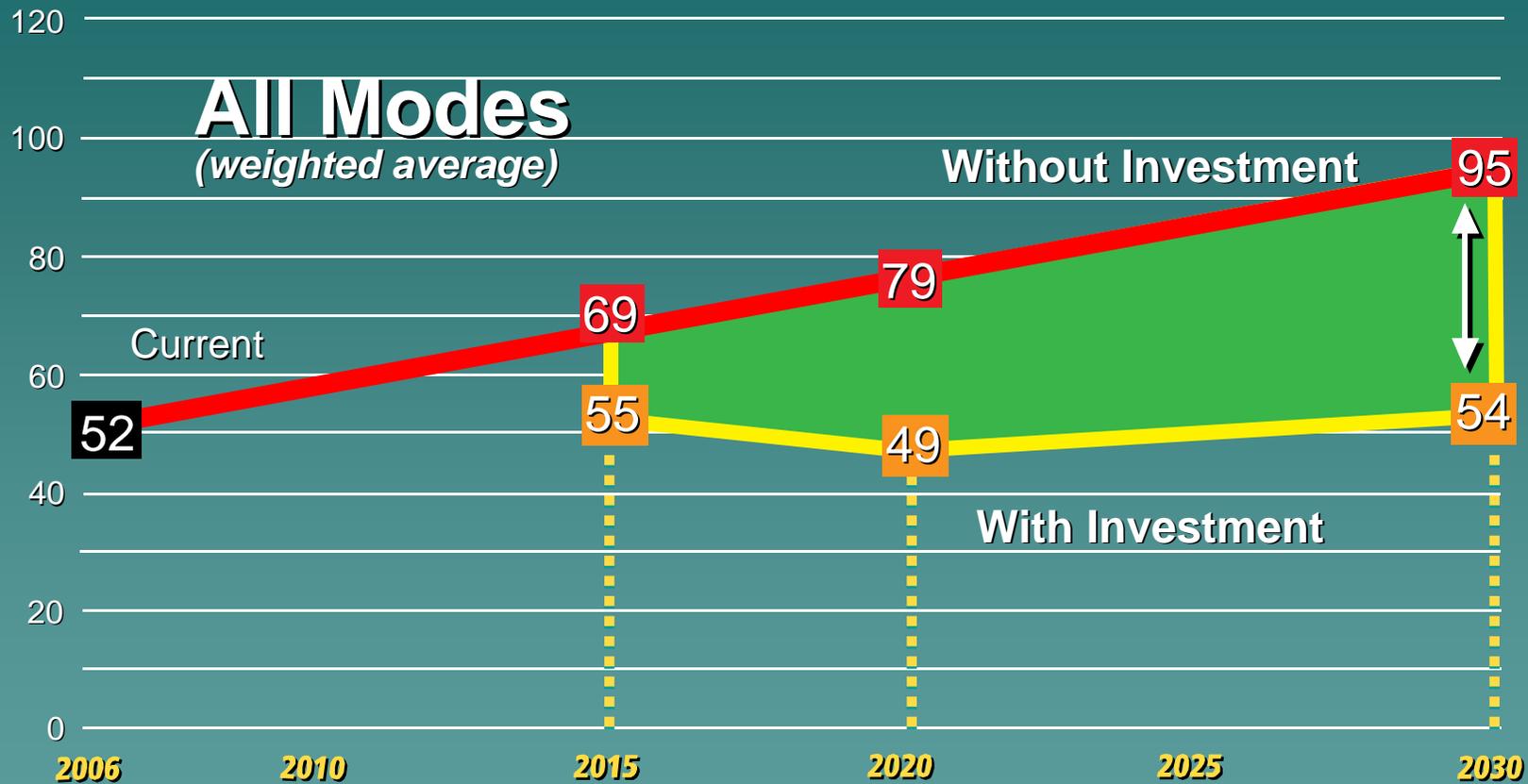
Average Travel Time, Door-to-Door (In Minutes)

Chula Vista to Sorrento Valley Travel Time



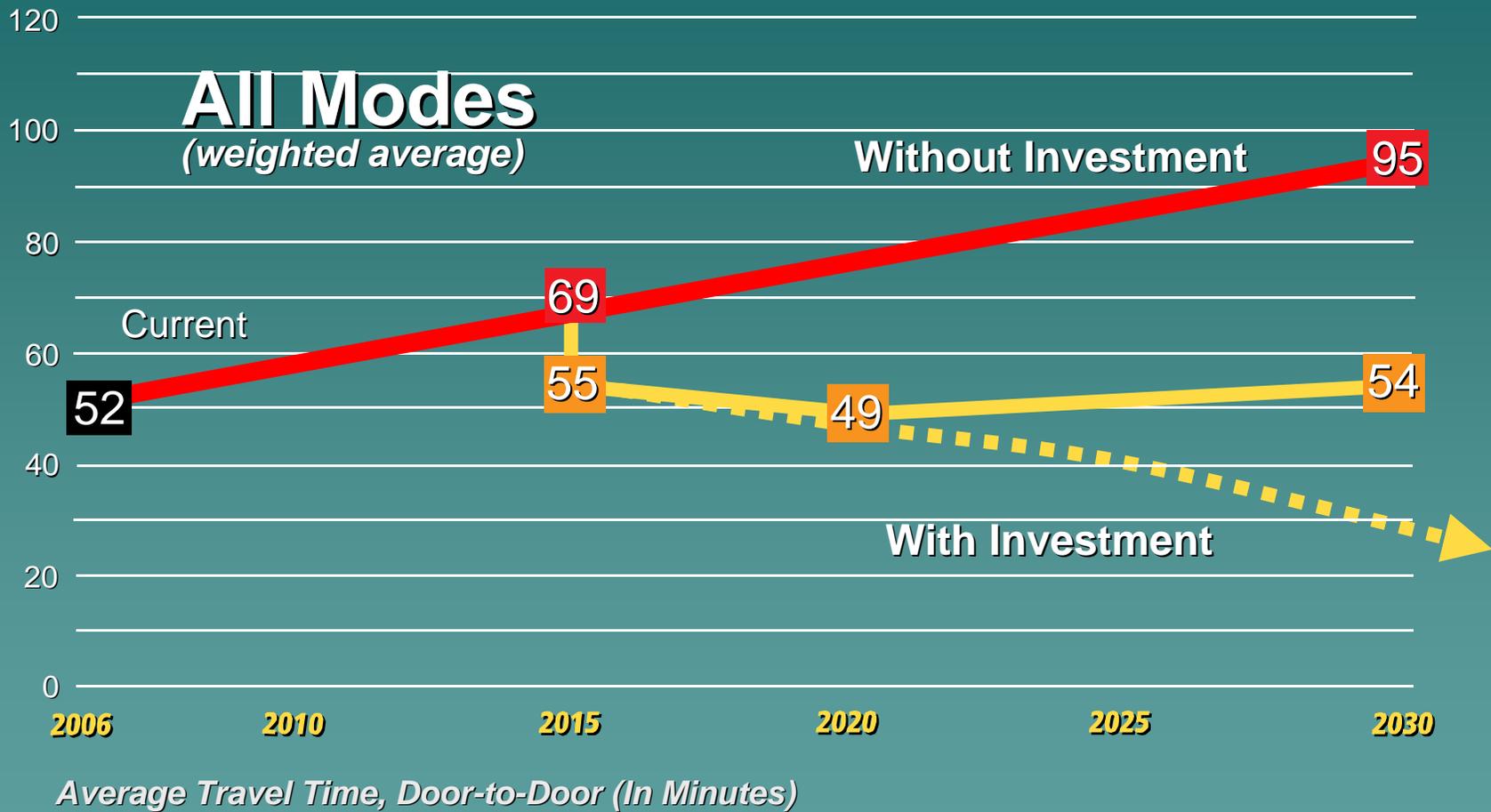
Average Travel Time, Door-to-Door (In Minutes)

Chula Vista to Sorrento Valley Travel Time



Average Travel Time, Door-to-Door (In Minutes)

Additional Travel Time Improvements are Possible



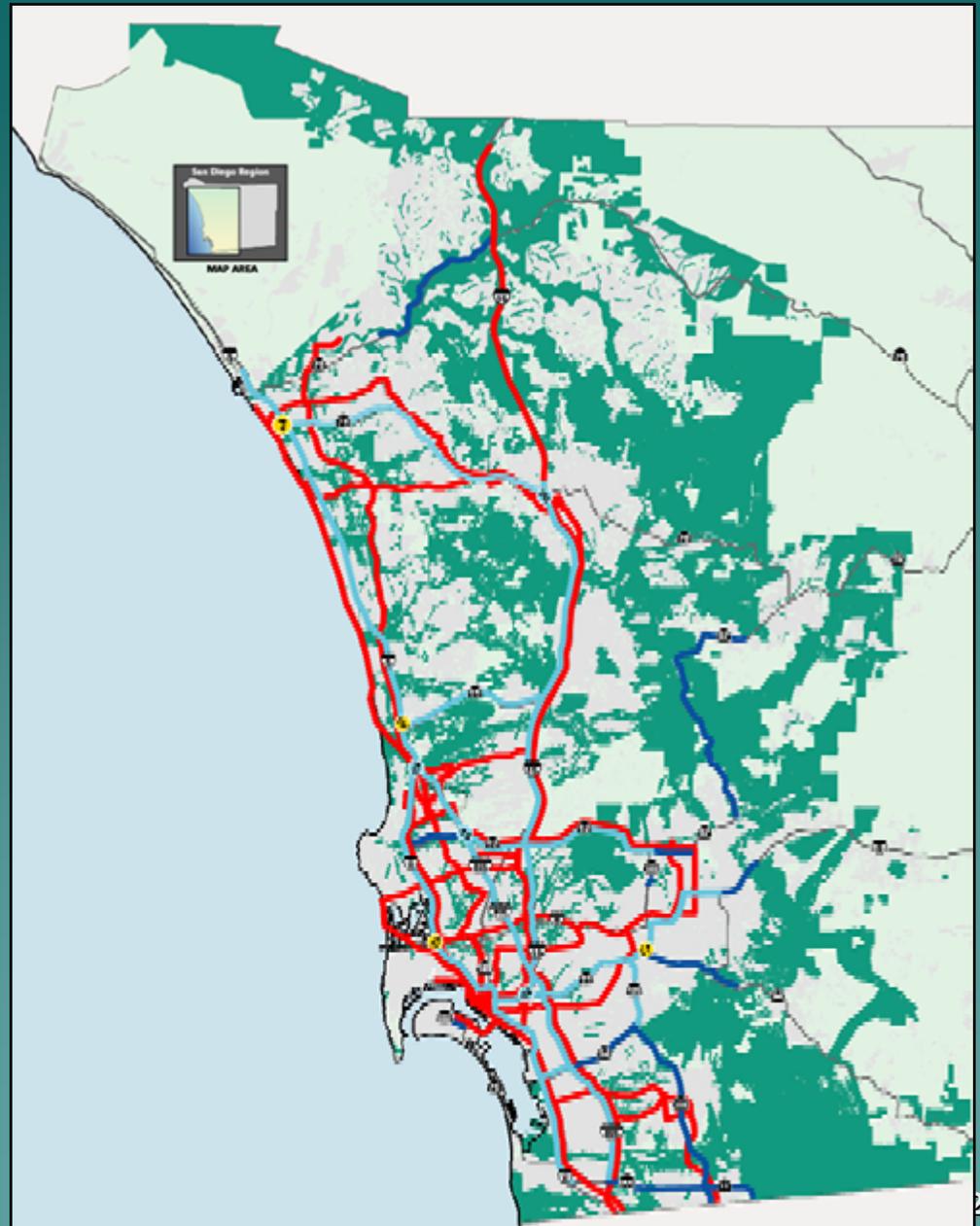
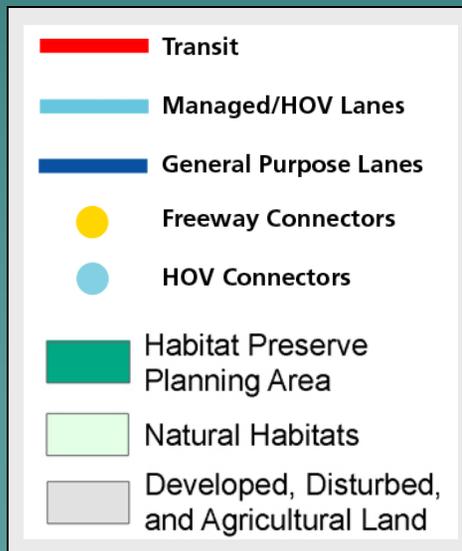
TransNet



SANDAG

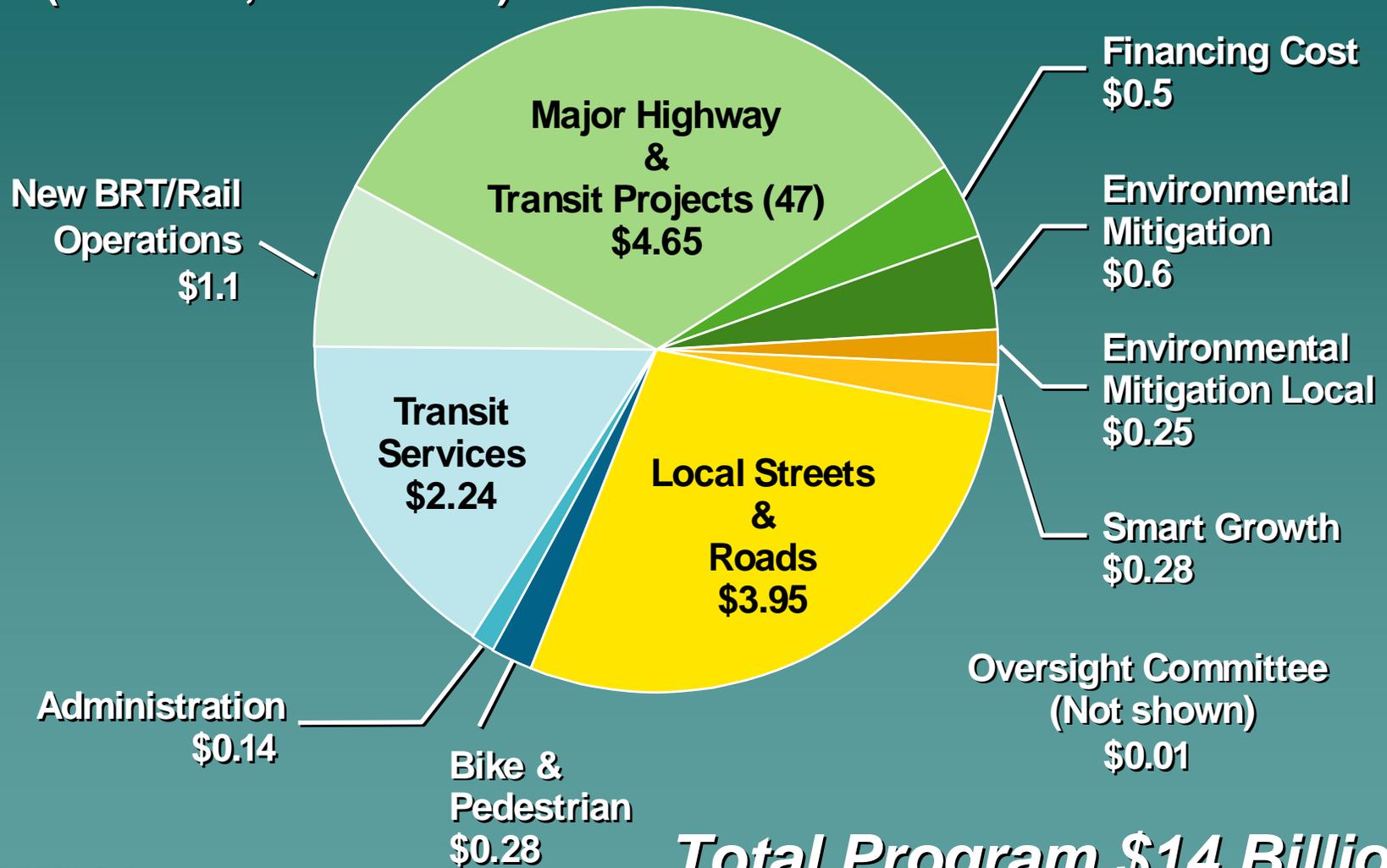
May 2005

*Regional
Habitat Preserve
Planning Area
with Mobility
Network*



40 Year Expenditure Plan

(In Billions, 2002 Dollars)

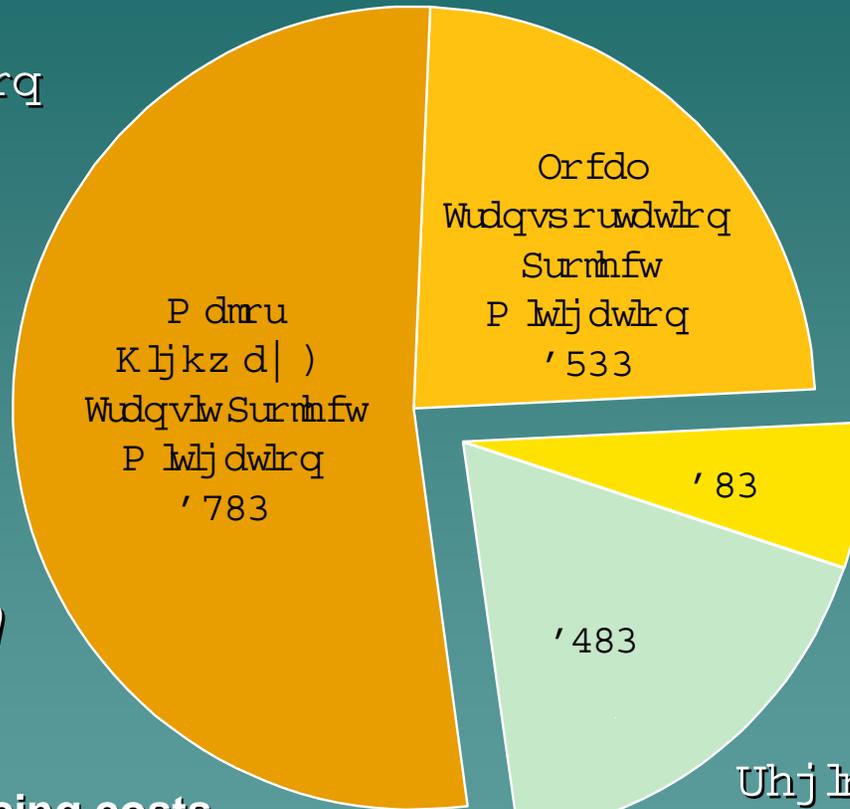


Total Program \$14 Billion

Environmental Mitigation Program Costs

High Priority/5335 Growth,

Wudqvs ruwdwlrq
Surnhfw
P lwj dwlrq
Ixqq
' 983p



**Total Program
\$850 Million**

Plus up to \$30m in financing costs
For advanced habitat acquisition

“Economic Benefit” based on:

- Purchasing mitigation land in advance of need in larger blocks at a lower cost
- Preventing Mitigation Ratio “Creep”

Conservation Benefits:

- Large-scale acquisition, restoration and management of critical habitat areas
- Make good on conservation programs promises
- Develop biological database make available to public

Transportation Benefits:

- Approach provides mitigation assurances for future transportation improvements
- Reduces future mitigation costs and allows for accelerated project delivery
- Transportation project mitigation consistent with habitat conservation plans

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