

Land Use and Community Character

Existing Conditions Overview

August 2023



Introduction

This report summarizes analysis of Marina's built environment and community design character. This analysis will serve as the baseline for the General Plan Update and environmental review, providing an important snapshot of land use planning in Marina.

Topics include:

- Planning context
- Existing land uses
- Land use regulation and plans
- Growth and development
- Urban form and character
- Demographics and economic market conditions

Planning Context

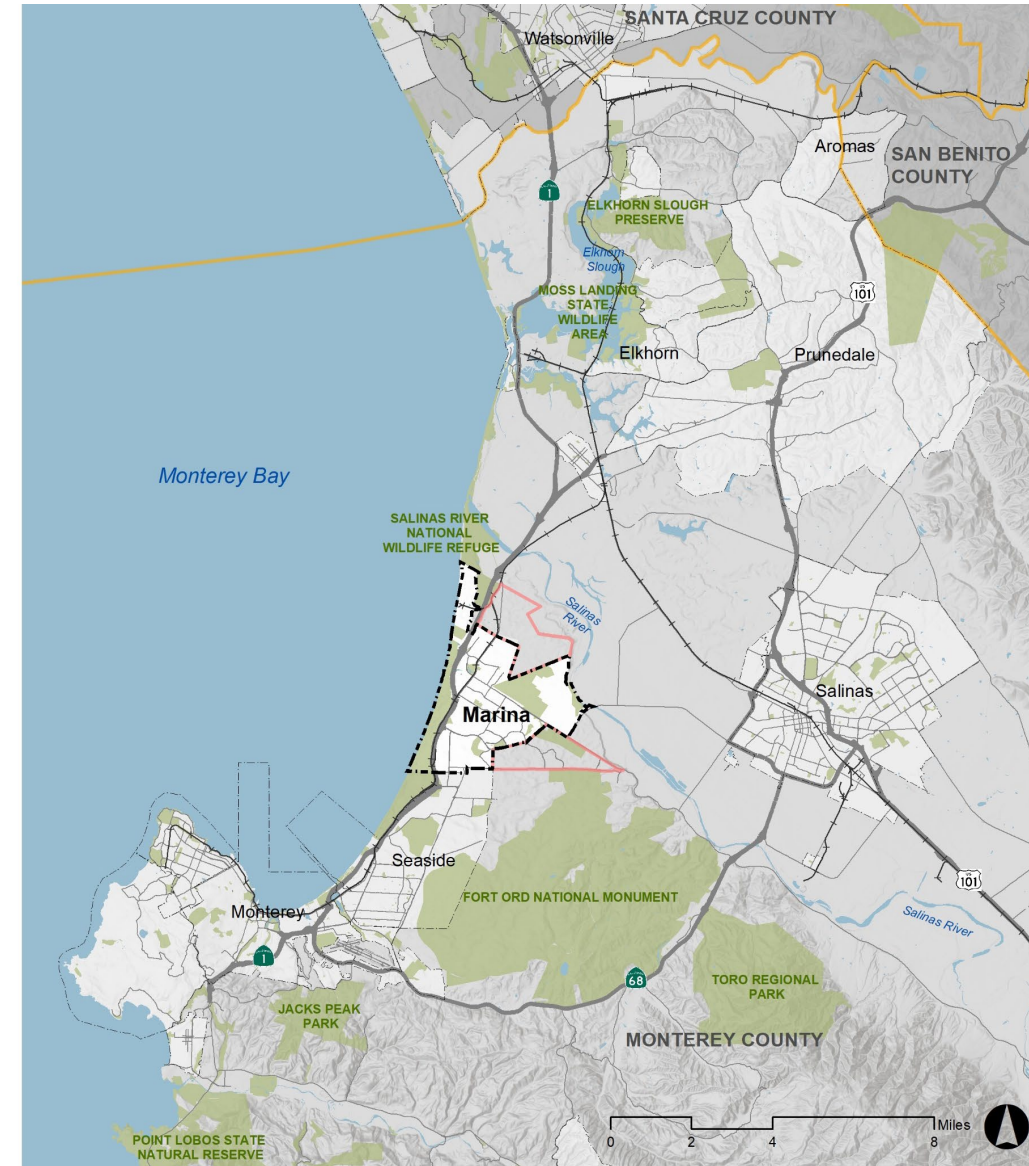
Planning and Regulatory Context

The following list includes planning and regulatory documents related to land use and community character:

- **Government Code section 65040.2 (General Plan Requirements)** – requires that jurisdictions maintain an up-to-date General Plan.
- **SB 330** – requires a maintenance of the overall residential development capacity in a city; suspends the enactment of local downzoning and housing construction moratoriums.
- **SB 9** – single-family neighborhood infill, up to 4 units per single-family parcel permitted with a lot split.
- **ADU Law (AB 2221)** – ADUs up to 18' allowed by right
- **Marina Downtown Vitalization Specific Plan** (currently being drafted) – new development standards
- **Adopted Specific and Master Plans** (6 total)
- **Objective Design Standards (ODS)** – ongoing effort to streamline and standardize residential and mixed-use project design review
- **Affordable Housing Overlay (AHO)** – identifies 20+ specific parcels where higher densities are allowed if housing is affordable at certain levels
- **Sixth Cycle Housing Element** – provides a framework for accommodating future housing needs, and planning for housing at a variety of housing levels

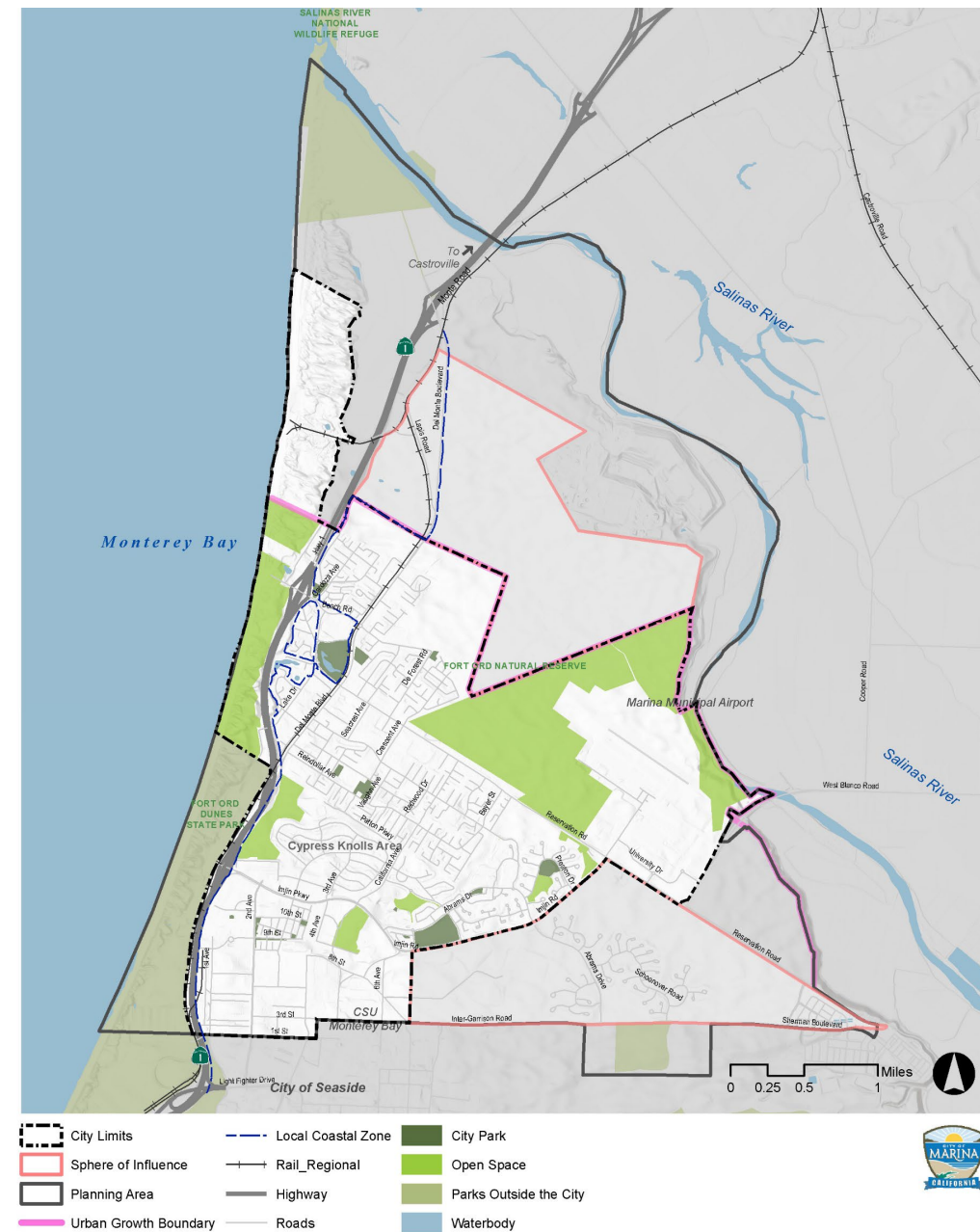
Regional and Physical Context

- The city of Marina is located in Monterey County, 15-minutes from Salinas and Carmel, and directly north of the city of Seaside.
- Marina is a coastal community that has a relatively flat topography apart from the dunes.
- The City is surrounded by the Monterey Bay, Salinas River, State Beach, Monterey County, and former Fort Ord lands (now the national monument).
- Marina and the city of Seaside share the majority responsibility of developing former Ft Ord property.
- At 21,000 residents, Marina accounts for approximately 5% of the County population.

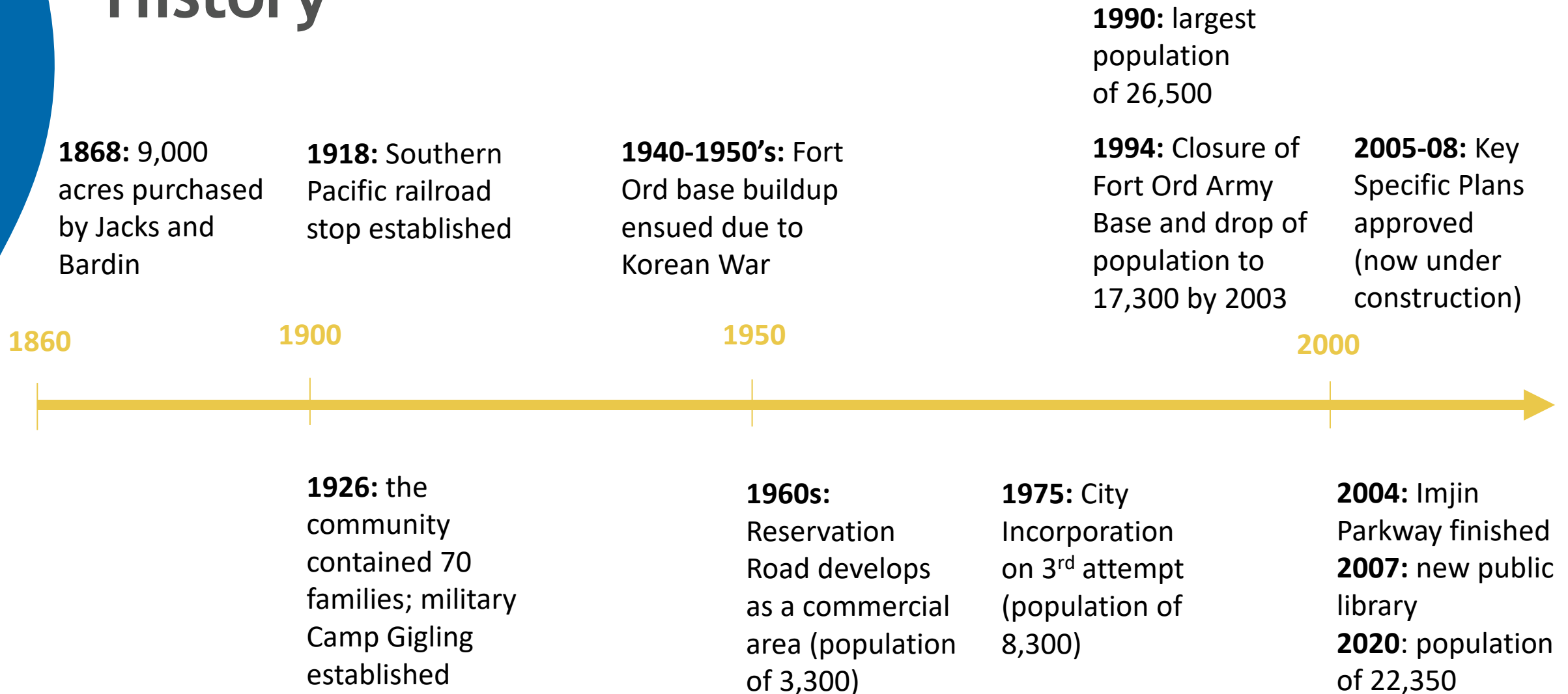


City Limits, Sphere, and Planning Area

- The General Plan covers a combination of geographies
- The largest, the Planning Area, encompasses approximately 10,880 acres of land, excluding major rights-of-way
- The Sphere of Influence is limited to two geographically distinct areas that total around 2,660 acres (to the northeast and southeast)
- The City Limits account for approximately 5,660 total acres



History



Existing Land Uses

Existing Land Use Overview

The existing land use section describes the overall pattern and composition of land uses in the City of Marina today.



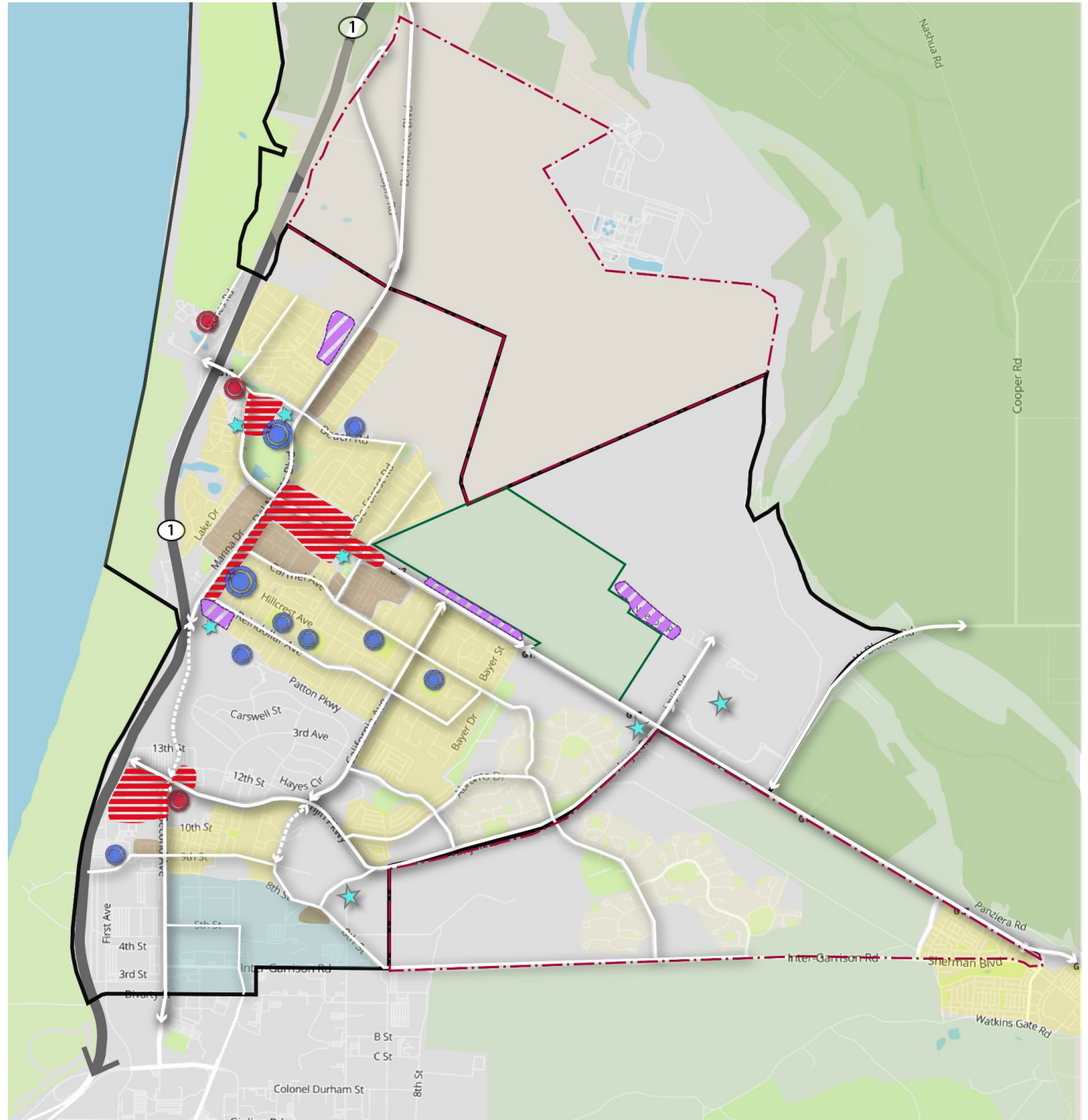
Existing Land Use Pattern

This description details the existing land uses pattern in Marina and relates to the diagram provided on page 11.

- Two auto-oriented commercial corridors, Reservation Road and Del Monte Boulevard, form the key activity spine of town and serve as the core of the Downtown Vitalization Specific Plan.
- Older, residential neighborhoods define the central and north parts of Marina; these are mostly one-story single-family homes with occasional courtyard housing or two-story apartments; lot sizes are moderate, approximately 5,000 sf – 7,500 sf.
- New big-box commercial buildings and hotels around 2nd Avenue and Imjin Parkway.
- New neighborhoods under construction in Southern Marina, exclusively comprised of very small-lot single-family housing with frequent parks and trails
- Dilapidated former base housing—that are being demolished—surrounds CSUMB campus at the far south end of Marina
- Several large open spaces are located on either side of the Municipal Airport to the east
- Highway 1 bisects the City from North to South and forms a physical barrier to the beach/ocean

Existing Land Use Pattern

- Single-Family Neighborhoods
- Multifamily Neighborhoods
- Commercial Retail District
- Industrial/Warehousing
- Hotel Districts
- Civic Districts
- Educational Center
- Key Opportunity Site



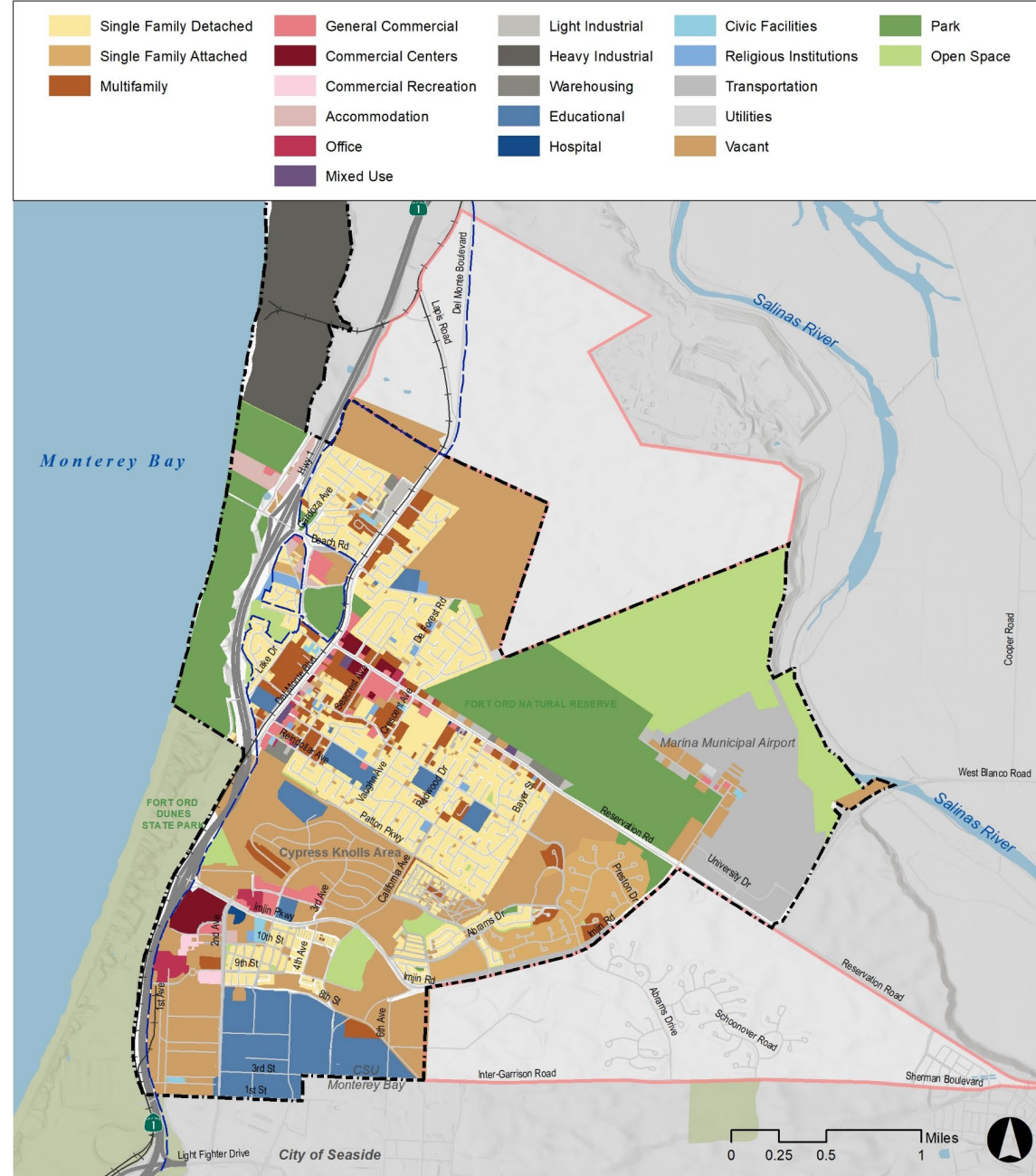
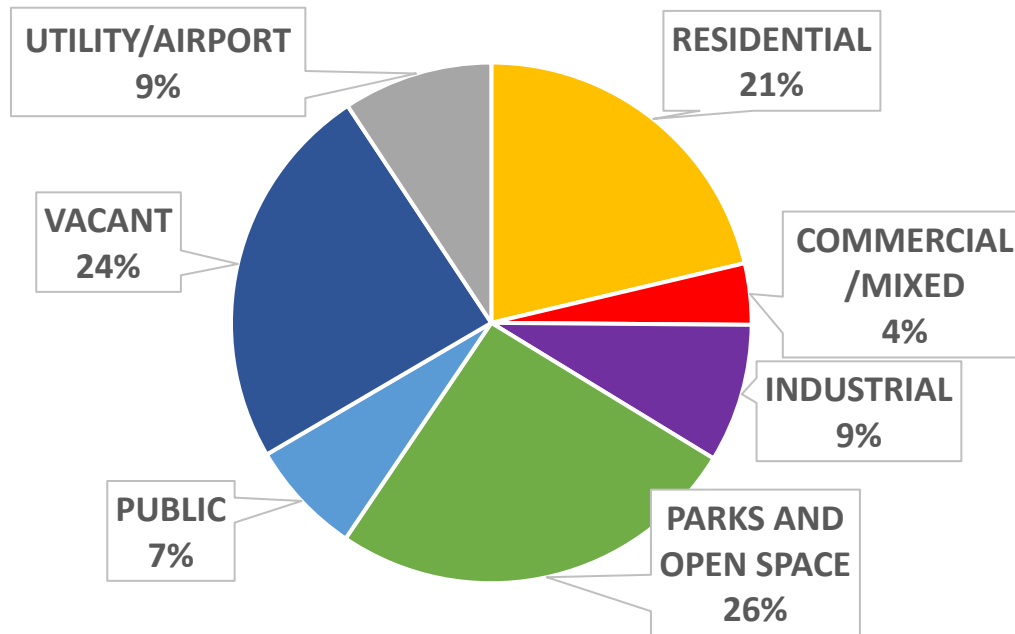
Existing Land Use Totals (within City Limits)

Land Use	Acres	Percent
RESIDENTIAL	1,097	21.3%
Single Family Detached	713	13.8%
Single Family Attached	192	3.7%
Multifamily	192	3.7%
COMMERCIAL	232	3.7%
General Commercial	73	1.4%
Commercial Centers	44	0.8%
Commercial Recreation	45	0.2%
Accommodation/Hotel	38	0.7%
Office	26	0.5%
Mixed Use	8	0.1%
INDUSTRIAL	442	8.6%
Light Industrial	24	0.5%
Heavy Industrial	401	7.8%
Warehousing	18	0.3%
PARKS AND OPEN SPACE	1,324	25.7%
Park	733	14.2%
Open Space	591	11.5%
PUBLIC/INSTITUTIONAL	2,086	40.5%
Educational	324	6.3%
Civic Facilities	18	0.3%
Religious Institutions	23	0.4%
Transportation/Utilities	481	9.2%
Vacant	1,241	24.1%
TOTAL	5,149	100.0%

Existing Use Overview

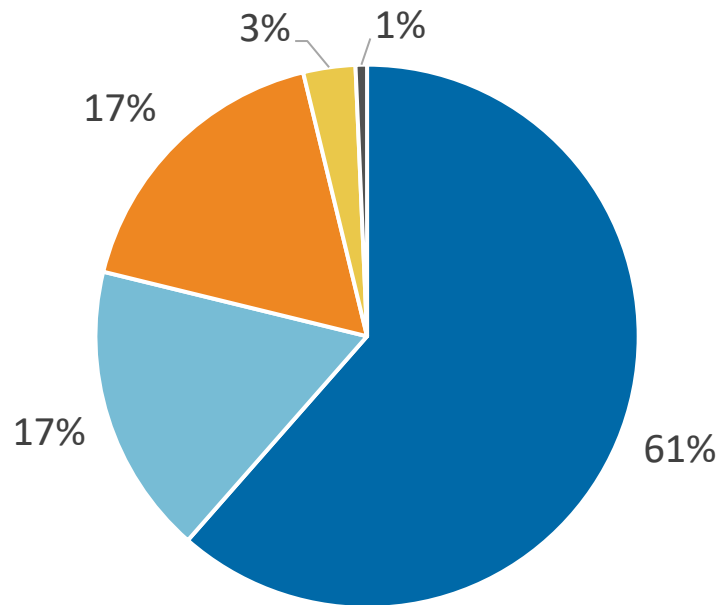
Within City limits, the major land uses are:

- Parks/open space; over 1,300 acres (26% of total)
- Vacant lands; 1,200 acres (24%)
- Single-family residential detached (14%) and townhouse/duplex (4%)



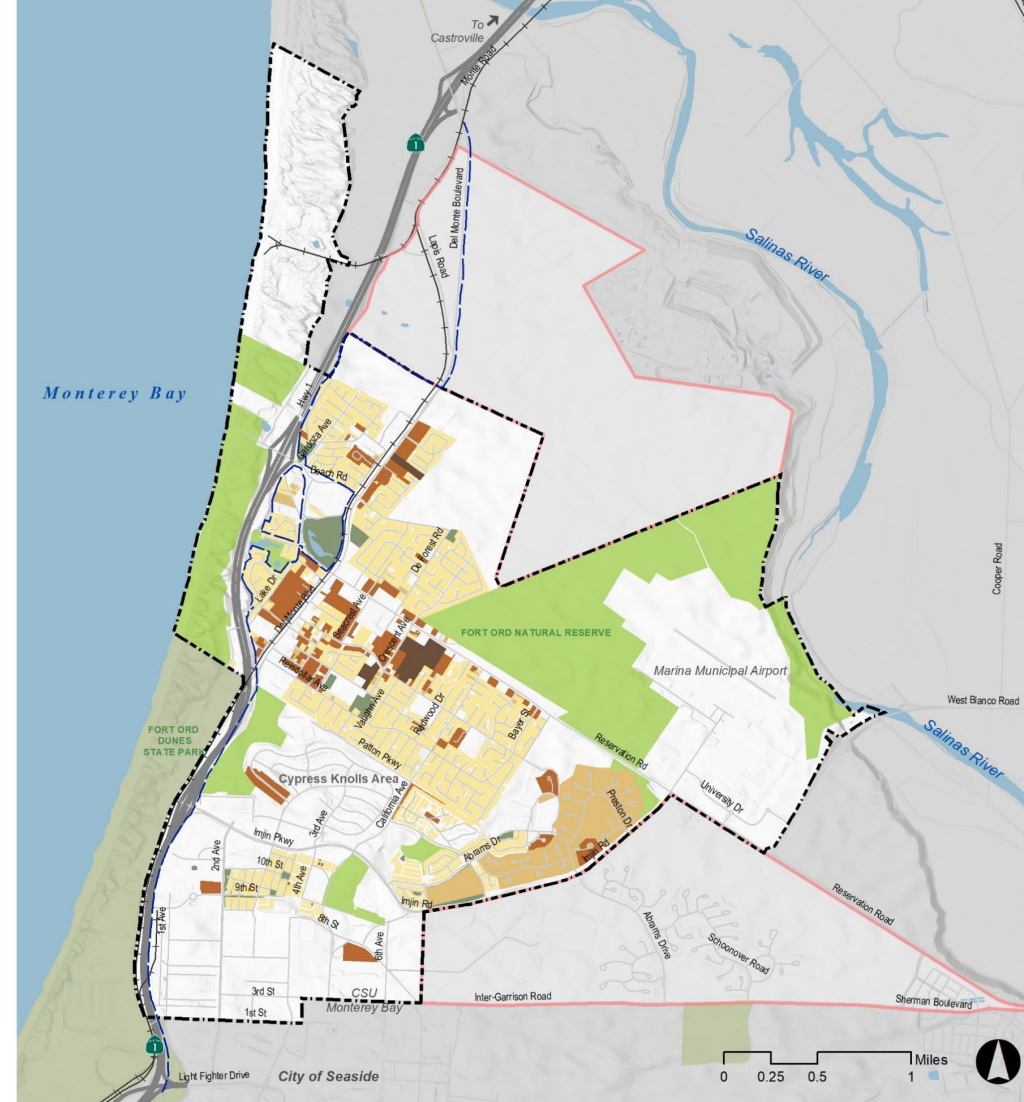
Residential Land Use

- Single-family detached: 680 acres (61% of total residential use area)
- Single-family attached/townhouse: 190 acres (17%)
- Multifamily apartment: 195 acres (17%)
- Mobile home: 34 acres (3%)
- Mixed use: 8 acres (>1% of total residential uses)



Residential Land Use Breakdown

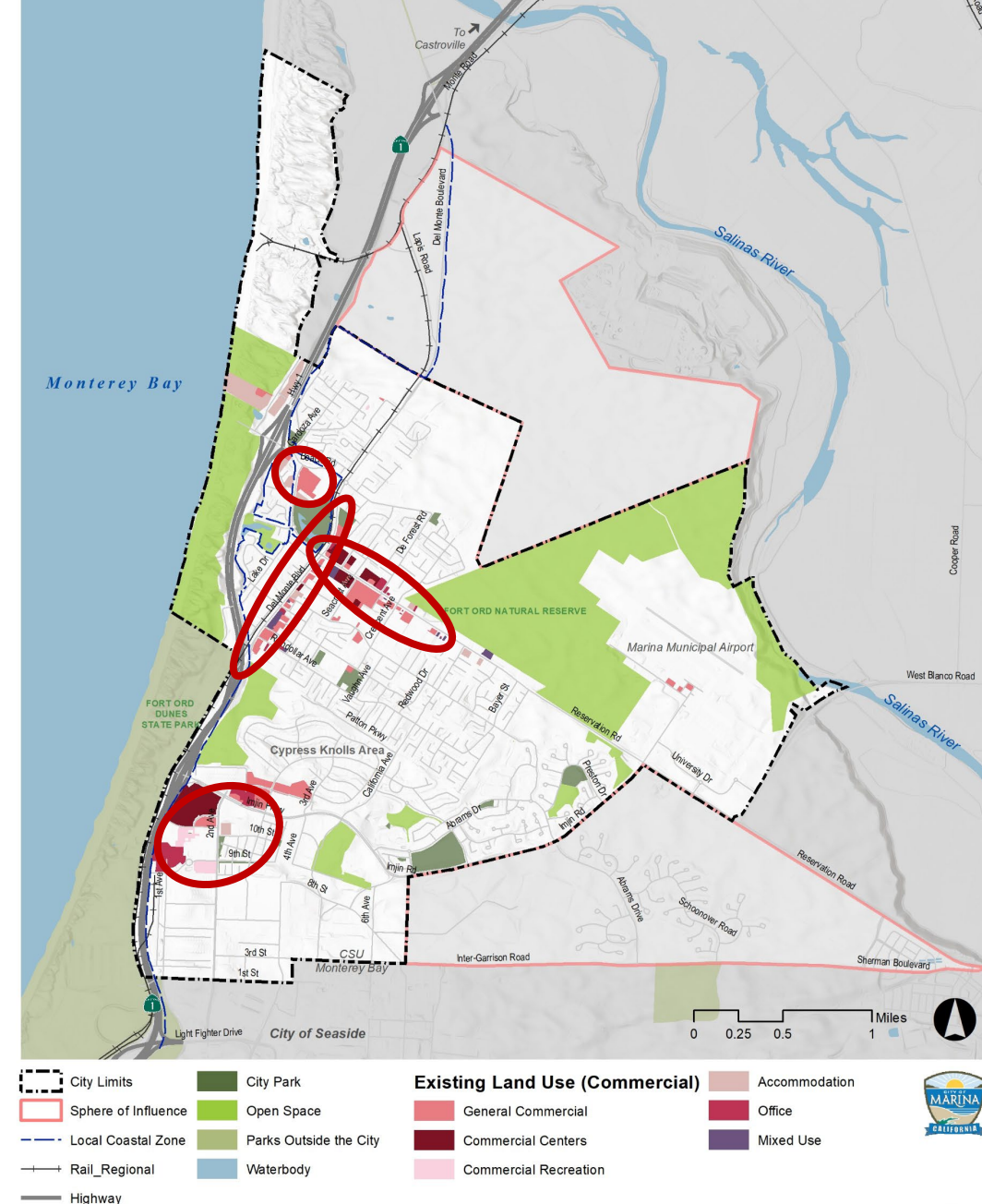
- Single Family Detached
- Single Family Attached
- Multifamily
- Mobile Home Park
- Mixed Use



Sources: City of Marina (2023); County of Monterey (2023); CPAD(2021); Urban Footprint (2023); ESRI (2022); USGS & NOAA (2016).

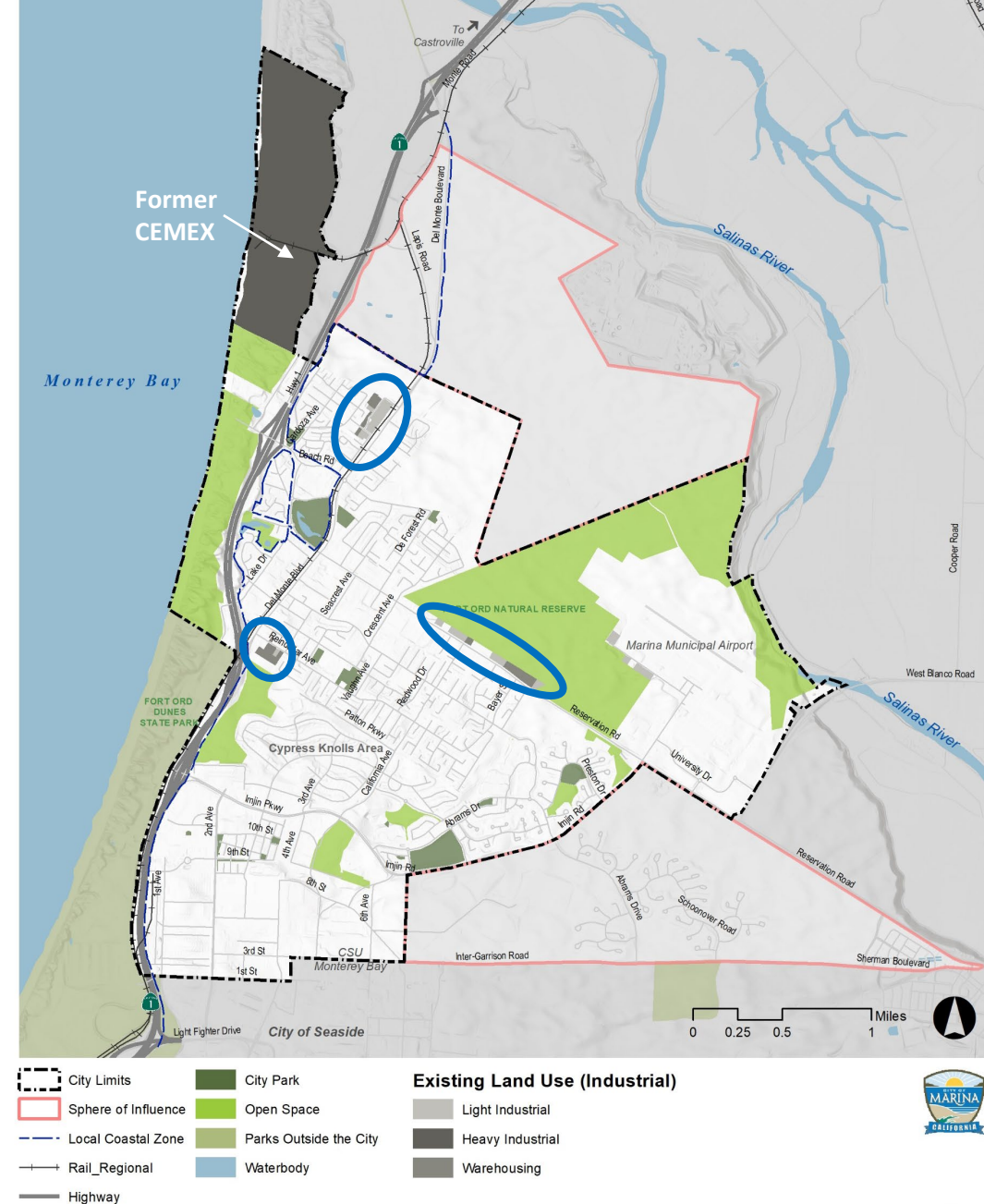
Commercial Uses

- Commercial uses occupy less than 4% of land in the City (232 total acres)
- Primary commercial types are general retail, shopping center, commercial recreation, lodging, and office
- Shops and services are concentrated in a few specific areas
 - Southern Del Monte, western parts of Reservation Rd, and around 2nd Avenue and Imjin Pwy
- The concentration of commercial in a few areas results in a lack of walkable access to services for many residents



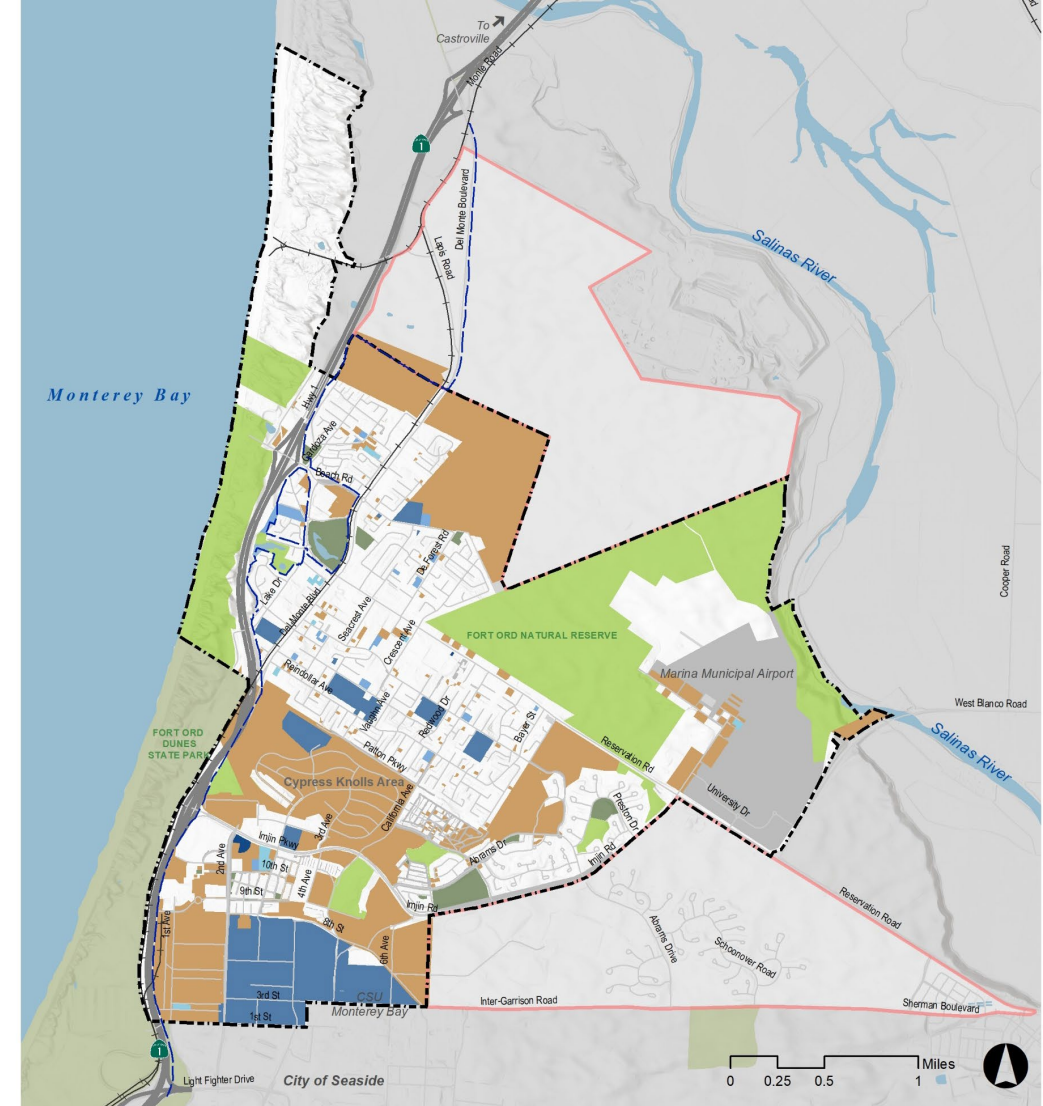
Industrial Uses

- Industrial uses account for 8% of land (excluding CEMEX, ~1%)
- Former CEMEX plant classified as heavy industrial (and is envisioned as future open space)
- Light industrial and warehousing are found along north Del Monte and west Reservation Road, and on Reindollar Avenue
- Airport-oriented uses are found at the Marina Municipal Airport



Public and Institutional Uses

- 7% of land is in currently used as public institutional use, such as CSUMB, public and private schools, hospitals/VA center, religious institutions, and similar
- 9% of land is represented by the airport or various utilities
- 24% is vacant land owned by public entities or former Fort Ord



City Limits	City Park	Existing Land Use (Public)	Religious Institutions
Sphere of Influence	Open Space	Educational	Transportation
Local Coastal Zone	Parks Outside the City	Hospital	Utilities
Rail_Regional	Waterbody	Civic Facilities	Vacant
Highway			
Roads			



Sources:
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Land Use Regulations/Plans

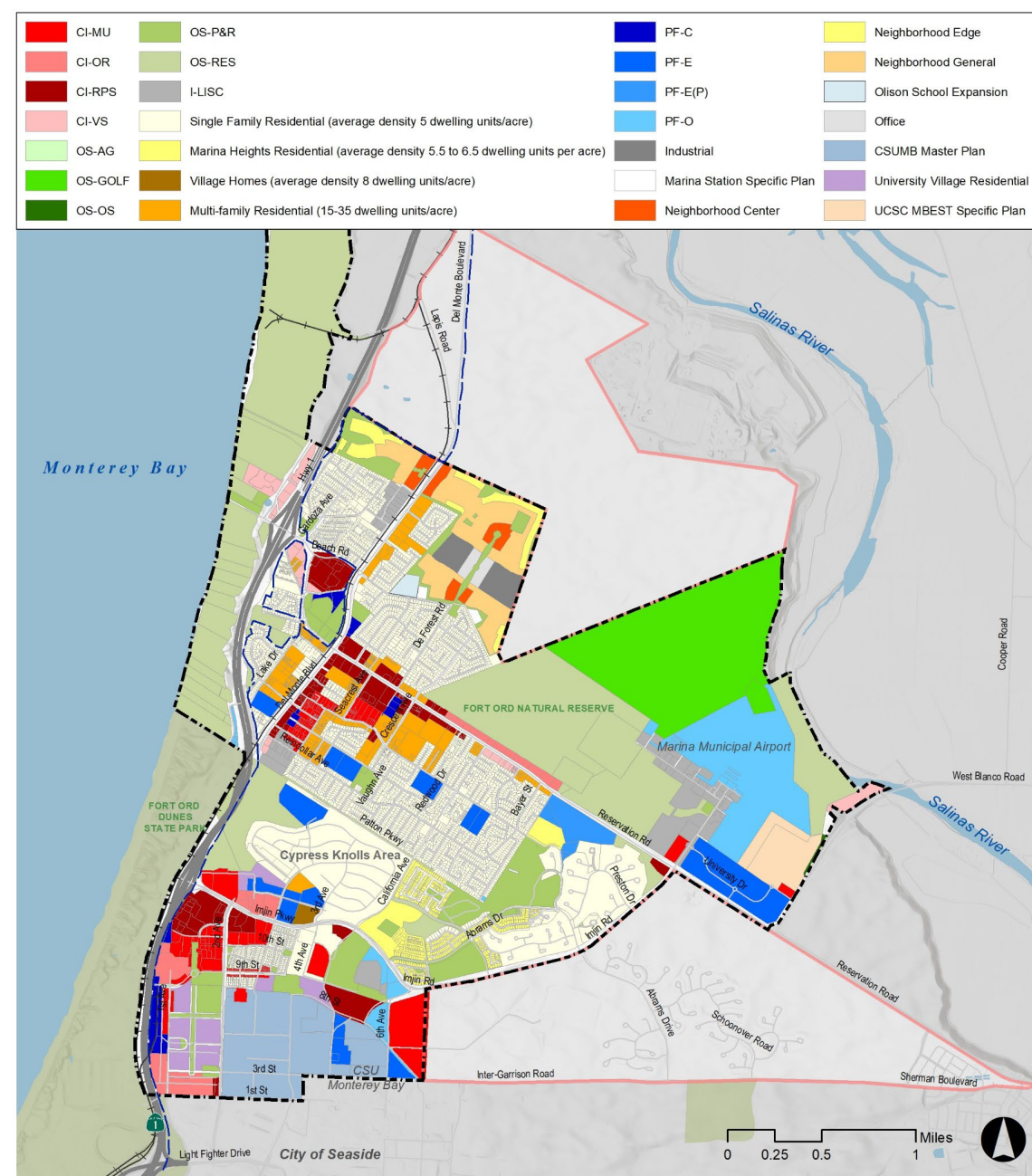
Land Use Regulations/Plans Overview

This section provides an overview of land use regulations and plans that impact the Marina General Plan.











This chapter describes existing land use designations, which are regulations for each parcel of land that specify which uses and intensities are permitted.

Land Use Designations

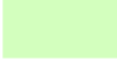




- The current land use map was originally prepared in 2000 and last updated in 2011.
- There are a total of 27 land use designations including:
 - Five residential designations
 - Six commercial/industrial types
 - Five unique classifications of parks/open space
 - Five public facilities types
 - All 6 designations from the Marina Station Specific Plan







General Plan Designations

RESIDENTIAL DESIGNATIONS		MAXIMUM DENSITY	LOCATION	
	Single-Family Residential	Average 5 du/acre	Central/North Marina, Schoonover (SOI)	
	Marina Heights Residential	5.5 – 6.5 du/acre	Sea Haven S.P.	
	University Village Residential (Dunes)	Average 8 du/acre	Most of the Dunes S.P.	
	Multi-family Residential	15 – 35 du/acre	Del Monte apartments, CSUMB MP, Marina Station core, Crescent, Carmel	
	High Density (Dunes)	30 du/acre	One parcel on Imjin Parkway under construction	
COMMERCIAL DESIGNATIONS		Minimum FAR	Maximum FAR	DESCRIPTION
	Multiple Use Commercial	0.25	0.90	Mixed retail
	Retail/Service	0.25	0.55 (0.90)	Shopping centers
	Office/Research	0.25	0.60	Office parks, medical
	Visitor-Serving	0.10	0.40	Lodging and misc.
	Light Industrial/Service Commercial	Varies 0.40-1.0		Warehouse, flex





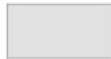

General Plan Designations



	PARK/OPEN SPACE DESIGNATIONS	DESCRIPTION
	Agriculture*	Farms outside of City limits
	Parks & Recreation	All public parks
	Habitat Preserve + Other Open Space	HMA's, perc ponds, wetlands, dunes, etc
	Golf Course	Proposed golf course north of airport
	UGB Open Space	1200 acres of preserved land

**No parcels currently designated*

	PUBLIC FACILITY DESIGNATIONS	DESCRIPTION
	Education	Existing public schools/colleges
	Education (Proposed)	Potential sites for future schools
	Civic	Government buildings
	Other Public Facilities	Public utilities and services

General Plan Designations

	MARINA STATION SPECIFIC PLAN	MAXIMUM DENSITY/INTENSITY
	Neighborhood Edge	Average 5 du/acre
	Neighborhood Center	Average 25 du/acre
	Neighborhood General	Average 9 du/acre (plus retail)
	Industrial	Varies, see Specific Plan
	Office	Varies, see Specific Plan
	Olson School Expansion	New Elementary school

	OTHER SPECIFIC PLAN DESIGNATIONS	DESCRIPTION
	CSUMB Master Plan	Intended for new student housing and office/R&D
	UC MBEST Specific Plan	Intended for mix of office, industrial, and public uses

General Plan Land Use Designations

The table below provides a breakdown of each General Plan Land Use (GPLU) designation in the City Limits including acres and percent of total.

General Plan Designation	Acres	Percent
RESIDENTIAL	1,629	31.8%
Single-Family Residential	1078	21.0%
Multi-Family Residential	157	3.1%
High Density (Residential Village Homes)	7	0.1%
Marina Heights Residential (Sea Haven)	110	2.1%
Neighborhood Center	29	0.6%
Neighborhood General	133	2.6%
Neighborhood Edge	45	0.9%
University Village Residential (Dunes)	70	1.4%
COMMERCIAL	540	10.4%
Multiple Use Commercial (CI-MU)	169	3.3%
Office/Research (CI-OR)	79	1.5%
Retail/Service (CI-RPS)	159	3.1%
Visitor Serving (CI-VS)	53	1.0%
Office (Marina Station SP)	12	0.2%
Business Park/Business Aviation Reserve	68	1.3%

General Plan Designation	Acres	Percent
INDUSTRIAL	167	3.2%
Light Industrial/Service Commercial (I-LISC)	129	2.5%
Industrial (Marina Station SP)	38	0.7%
PARKS AND OPEN SPACE	2,002	39.0%
Golf Course (OS-GOLF)	418	8.1%
Parks & Recreation (OS-P&R)	318	6.2%
Habitat Preserve + Named Open Space (OS-RES)	1,266	24.6%
PUBLIC/INSTITUTIONAL	544	10.6%
Olson School Expansion	8	0.2%
Civic (PF-C)	32	0.6%
Education (PF-E)	148	2.9%
Education Proposed (PF-E(P))	38	0.7%
Other Public Facilities (PF-O)	250	4.9%
Undesignated/Not in Data	68	1.3%
SPECIFIC PLAN	251	4.9%
Marina Station Specific Plan	4	0.1%
CSUMB Master Plan	247	4.8%
TOTAL	5,140	100.0%

**Difference between totals for existing land use and GPLU is due to roadway parcels/ROWs.*

No Net Loss Analysis

General Plan Designation	Acres	Maximum Density	Maximum Units
Single-Family Residential	1078	5	5,390
Multi-Family Residential	157	35	5,495
High Density (Residential Village Homes)	7	30	210
Marina Heights Residential	110	6.5	715
Neighborhood Center	29	25	725
Neighborhood General	133	9	1,197
Neighborhood Edge	45	5	225
University Village Residential	70	8	560
Retail/Service (CI-RPS) <i>Commercial</i>	159	35	5,565
TOTAL			20,082

A preliminary no net loss analysis indicates that the total maximum feasible residential development capacity for the City of Marina under current General Plan regulations is **~20,000 housing units.**

No Net Loss Law - Government Code Section 65863

2000 General Plan Planning Principles

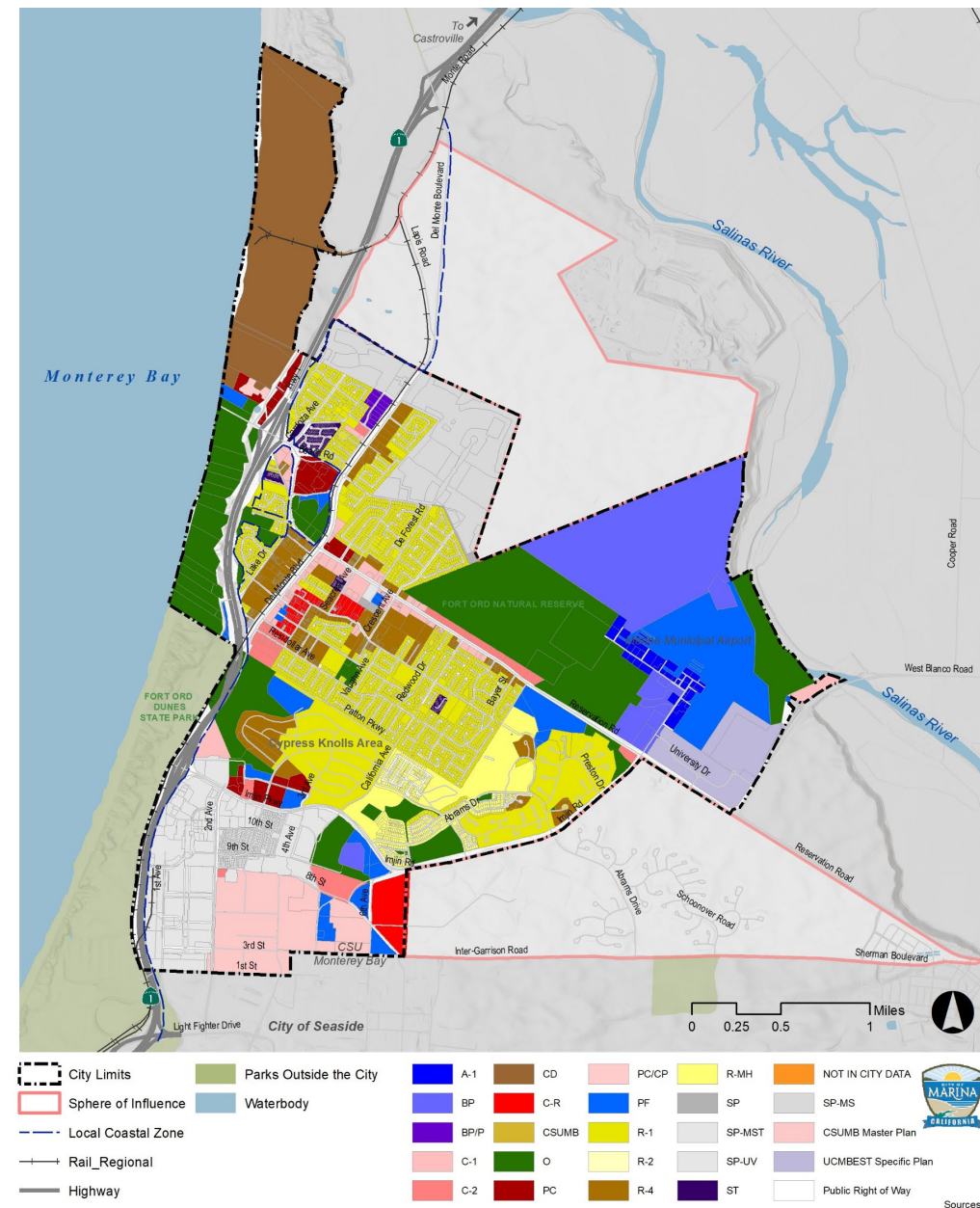
Within the City's current General Plan, the following 'planning principles' serve as the basis of the city's future direction and decision-making:

1. Avoid developing critical habitats and prime agricultural land
2. Create more diverse housing types
3. Better jobs-housing balance
4. Improve transit service and walkability
5. Create one or more civic/town centers
6. Ample outdoor recreation opportunities
7. Protection from flooding, earthquakes, slopes/erosion
8. A City with a sense of pride and identity
9. Physically and socially cohesive community
10. Development responsive to the history, context, and natural features

Zoning

Residential Zones	Maximum Density
Single-Family Residential (R-1)	7.5 du/acre
Duplex Residential (R-2)	10 du/acre
Limited Multiple-Family Resid. (R-3)*	15 du/acre
Multiple-Family Residential (R-4)	15-35, up to 43 du/acre for SRO or senior housing
Marina Heights Residential (MHR)	5.5 – 6.5 du/acre
Special Treatment (ST)	Varies; condominiums
Commercial Zones (that allow residential)	
Commercial/Multiple-Family Residential (C-R)	20-35 du/acre, up to 43 for SRO or senior housing
Retail Business District (C-1)	25 du/acre
General Commercial District (C-2)	8 du/acre
Planned Commercial (PC)	Res. can't exceed 10%
Agricultural Residential (K)*	4 du/acre

*No parcels currently zoned



Commercial and Industrial Zones	
Airport District (A-1)	Max 7.0 FAR, 56' Height. Aviation-related uses surrounding the airport.
Industrial (M)	Max 35' Height, min 1-acre. Warehouse, light industrial, manufacture.
Business Park (BP) and BP/P	Max 56' in BP, 35' in BP/P. Office, R&D, light industrial, and/or retail.
Coastal Conservation & Development (CD)	Former CEMEX plant; coastal recreational and industrial uses.
Specific Plan Zones	
Marina Station SP (SP-MS)	Former Armstrong Ranch property
CSUMB Master Plan	Area encompassing the CSUMB campus within Marina.
UCMBEST Specific Plan	Planned (not built) research and office park east of airport.
Specific Plan (SP)	Remnant parcels from completed Specific or Master Plans.
MST Specific Plan (SP-MST)	One parcel at the downtown MST station, unbuilt mixed-use project.
University Village SP (SP-UV)	The Dunes master planned project, currently under construction.
Public and Coastal Zones	
Open Space (O)	All parks and publicly-owned open spaces.
Public Facilities (PF)	Civic and government facilities, including public utilities.
Coastal Development Permit District (PC/C-P)	Planned commercial with coastal permit requirement (The Sanctuary)
Coastal Zone Secondary Use Combining (SU)	Special coastal zone - <i>no current parcels with this zone</i>



Zones

The table below provides a breakdown of each Zone in the City Limits including number of acres and percent of total.

Zoning	Acres	Percent
RESIDENTIAL	1,425	27.6%
Single-Family (R-1)	942	18.3%
Duplex Residential (R-2)	1	0.0%
Multiple-Family Residential (R-4)	243	4.7%
Marina Heights Residential (R-MH)	212	4.1%
Special Treatment (ST)	27	0.5%
COMMERCIAL	778	15.0%
Commercial/Multiple-Family Residential (C-R)	76	1.5%
Retail Business District (C-1)	78	1.5%
General Commercial District (C-2)	49	0.9%
Business Park (BP) and (BP/P)	486	9.4%
Planned Commercial (PC)	83	1.6%
Coastal Development Permit District (PC/CP)	6	0.1%

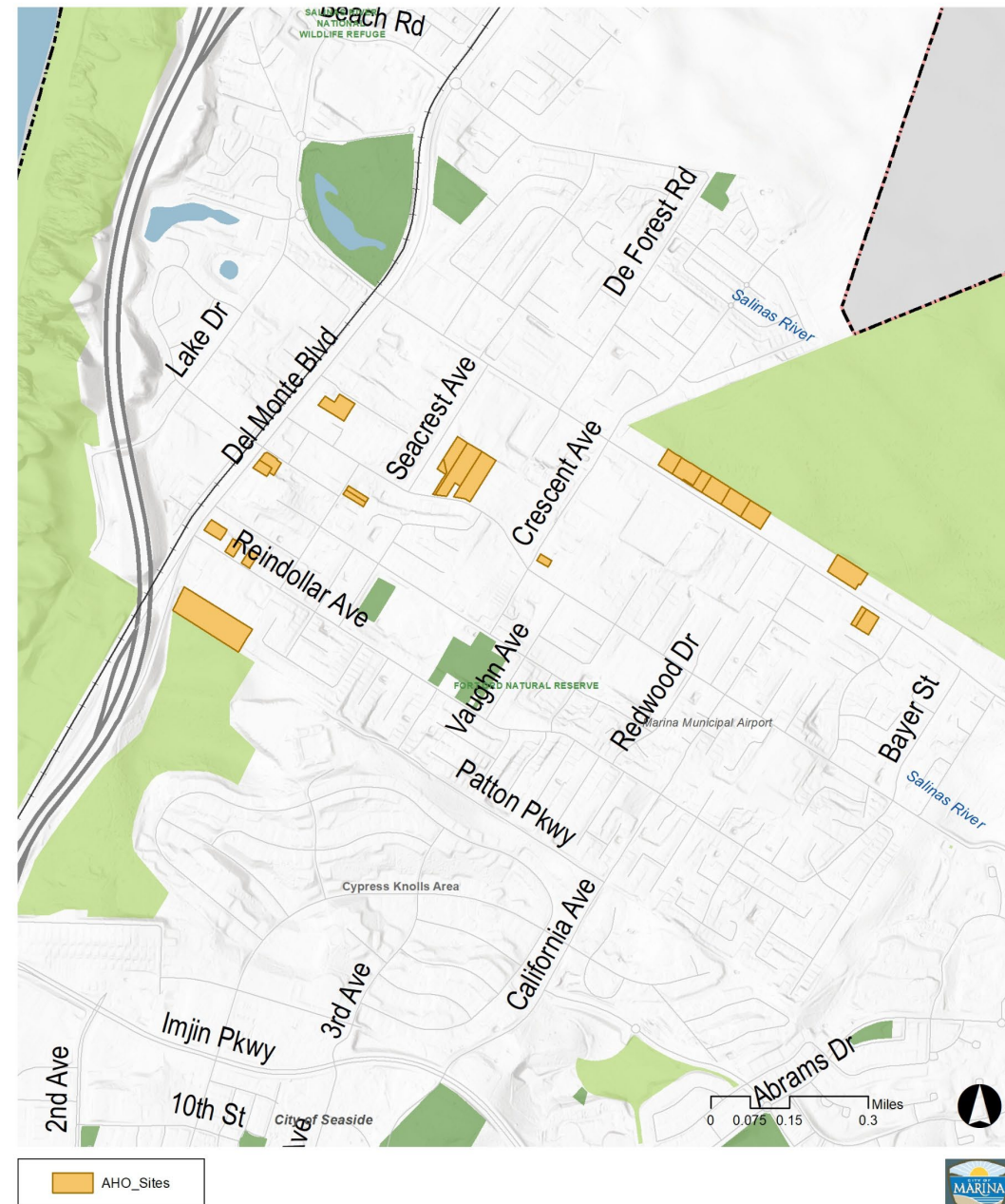
Zoning	Acres	Percent
INDUSTRIAL	47	0.9%
Airport District (A-1)	47	0.9%
PARKS AND OPEN SPACE	1,218	23.7%
Open Space (O)	752	14.6%
Coastal Conservation and Development (CD)	466	9.1%
PUBLIC/INSTITUTIONAL	315	6.1%
Public Facilities (PF)	315	6.1%
SPECIFIC PLAN	1,285	25.0%
Specific Plan (SP)	8	0.2%
Marina Station Specific Plan (SP-MS)	331	6.4%
MST Specific Plan (SP-MST)	3	0.1%
University Village Specific Plan (SP-UV)	554	10.8%
UCMBEST Specific Plan	140	2.7%
CSUMB Master Plan	249	4.8%
TOTAL	5,140	100.0%

- One-quarter of the parcel acres in the City are zoned for Specific Plans.

Affordable Housing Overlay

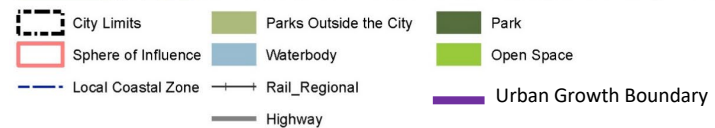
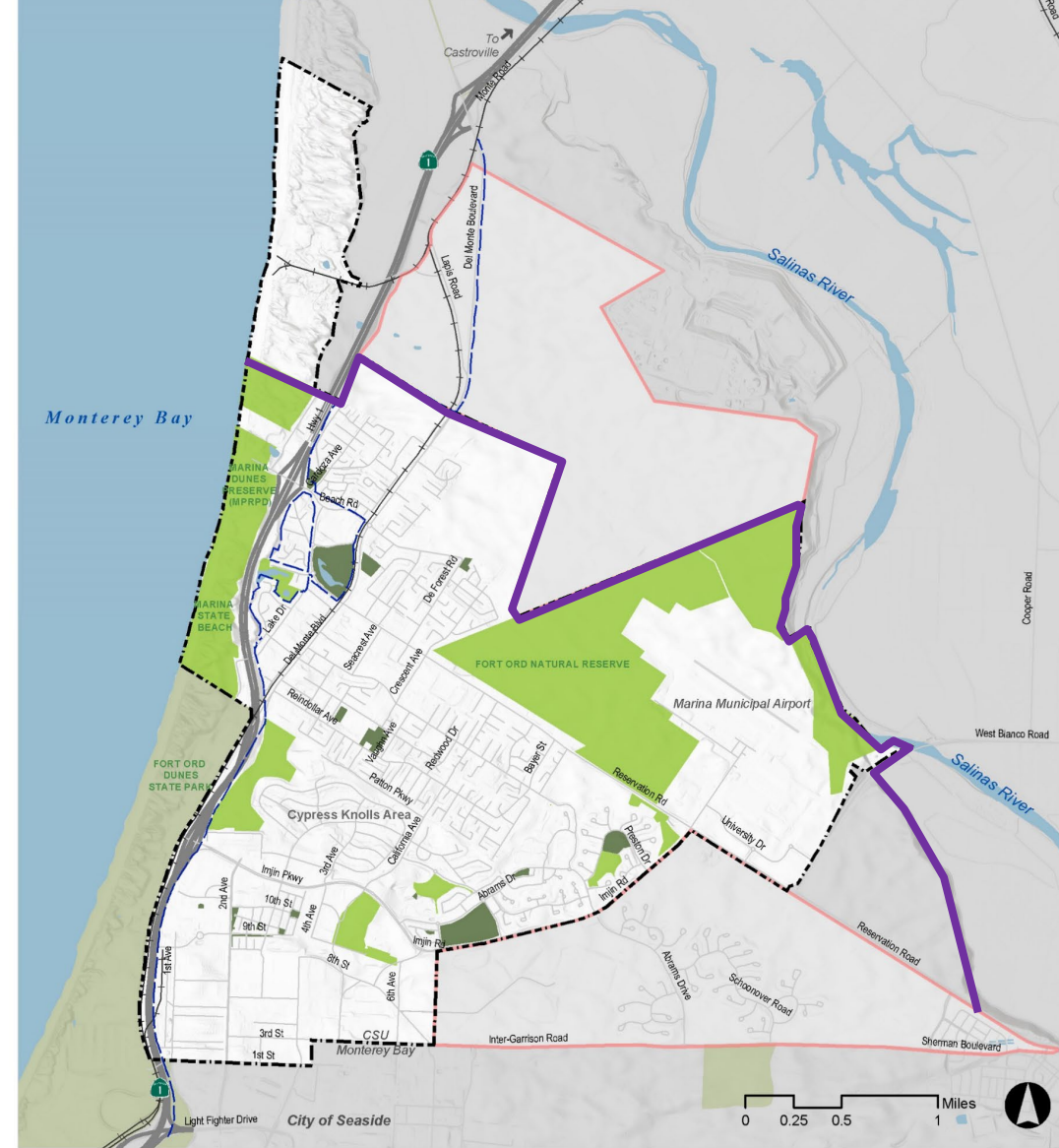
The Affordable Housing Overlay modifies base residential development capacity, compared to the standards in the City's municipal code.

- Adopted February 2023
- 16 sites identified; 13 vacant & 3 contain single-family homes
- Incentivizes affordable housing
- Minimum of 30 du/a and maximum of 35 dwelling units per acre (50 du/a on Reservation or Del Monte)
- Minimum of 12% of units as very low or 15% as low-income units
- Reduced parking standards and objective design standards
- Estimated capacity of 532 units



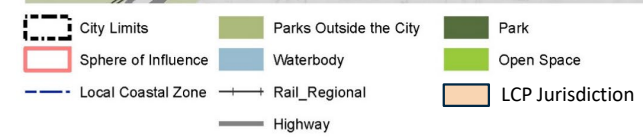
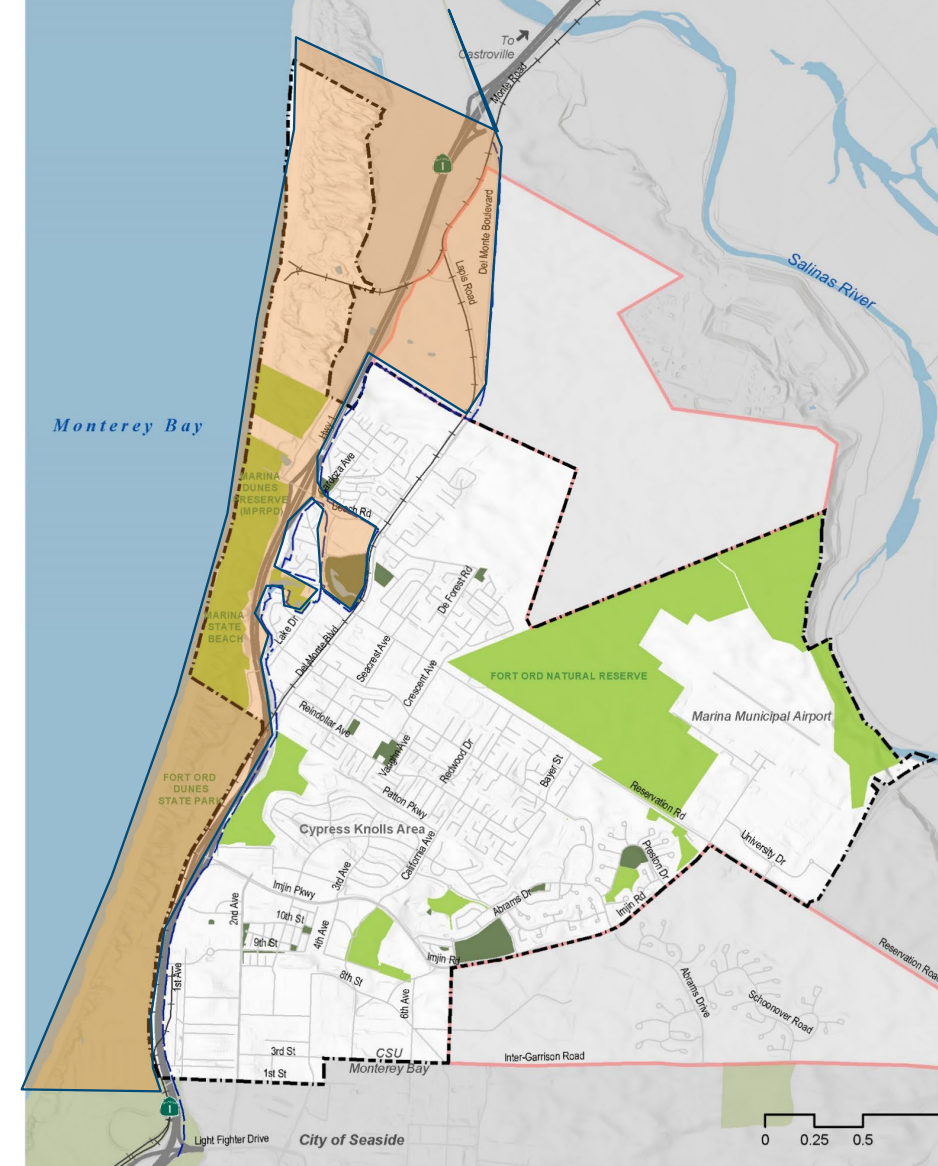
Urban Growth Boundary

- The Urban Growth Boundary (UGB) was first adopted in 2000, and was later extended by voters to 2040
 - Generally located along the northern edge of the City
 - City cannot develop north of purple line
- UGB land shall remain as unimproved open space for use only as
 - Preservation of natural resources
 - Scientific study and research
 - Managed production of resources
 - Outdoor recreation



Local Coastal Program - Land Use Plan

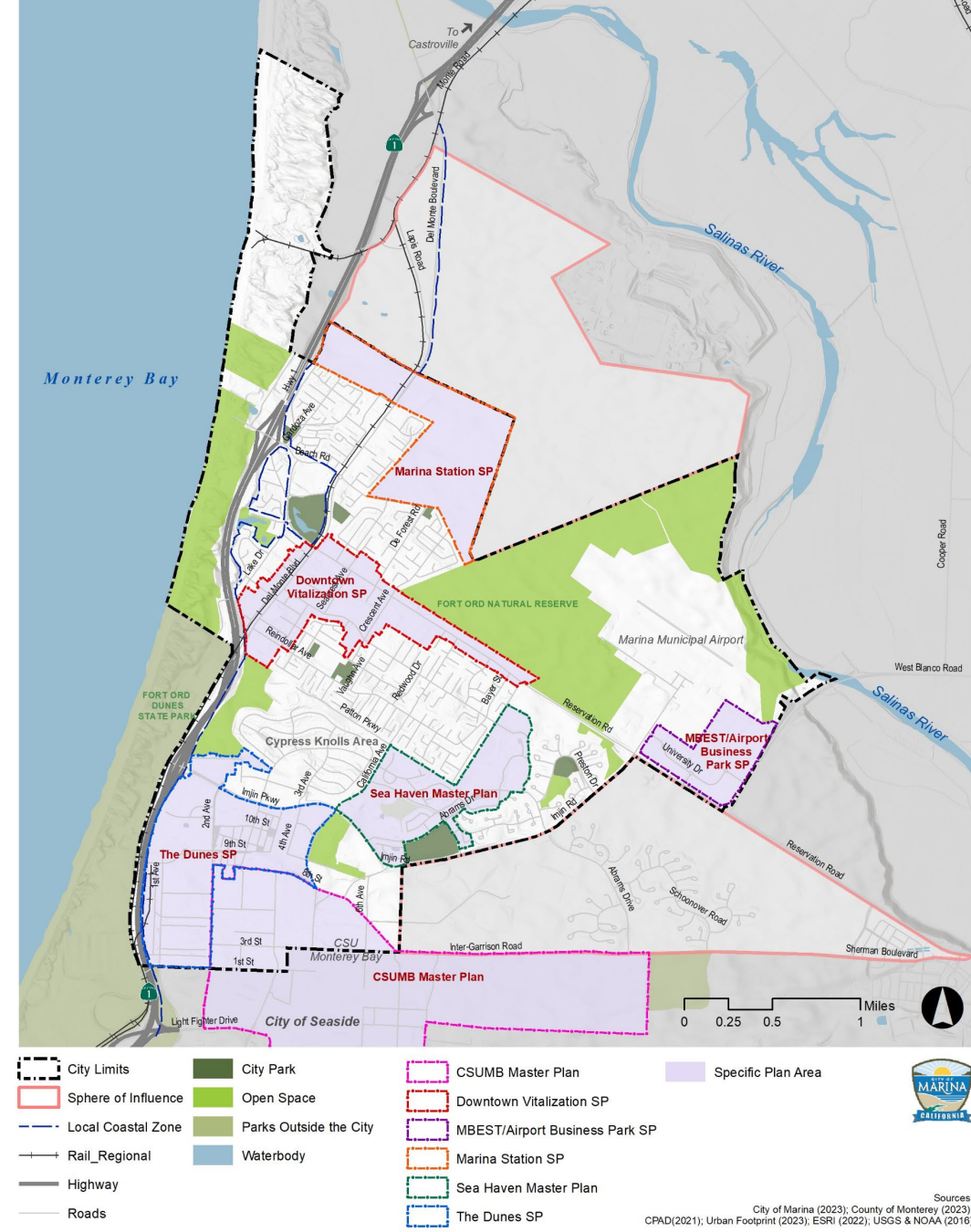
- The Local Coastal Program (LCP) is an optional document that supports mandatory review by the Coastal Commission and does the following:
 - Controls land use and development near water
 - Ensures maximum public access with environmental sensitivity and protection of coastal resources
 - Guides required California Coastal Commission review
- The Local Coastal Program was last updated in 2008
- Coastal zones within Marina's LCP are:
 - General Commercial
 - Visitor-Serving Commercial
 - Coastal Conservation and Development (only found in the LCP)
 - Public Facilities
 - Single-Family Residential (one street within LCP)
 - Parks and Open Space



Existing Plans

A number of areas in the City have established vision and policies guiding future development. These are listed below and described on the next pages:

- Marina Station Specific Plan
- The Dunes Specific Plan (*under construction*)
- Cypress Knolls (*to be updated*)
- Sea Haven Master Plan (*under construction*)
- Downtown Vitalization Plan
- MBEST/Airport Business Park Plan
- CSUMB Master Plan (*under construction*)



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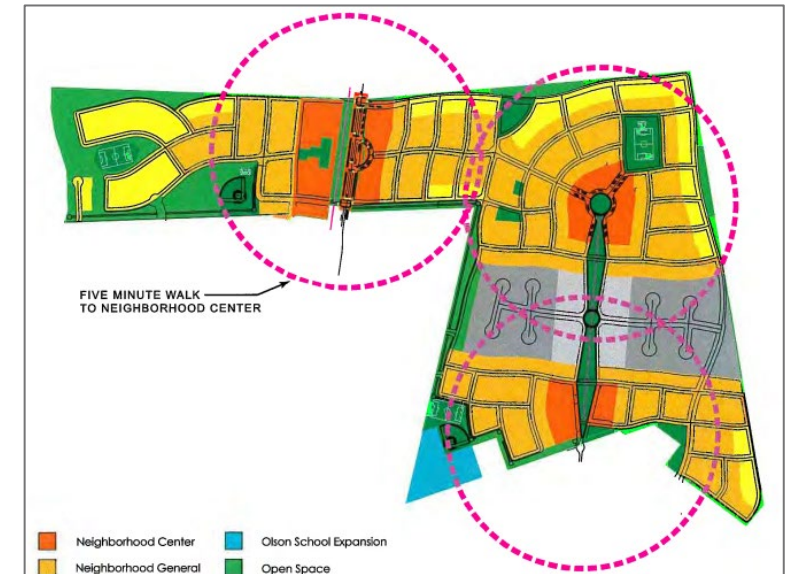


Summary of Existing Specific + Master Plans

Specific/Master Plan	Entitled Residential Development	BMR Units	Entitled Non-Residential Development	Total Acres
Marina Station Specific Plan	1,360 units	272 units	60,000 s.f. commercial/retail, 143,800 s.f. office, 651,600 s.f. of industrial	320 acres
The Dunes Specific Plan	1,237 units	140 units	1.12 million s.f. of retail 760,000 s.f. of office/research uses, 500-room hotel	429 acres
Sea Haven Master Plan	1,050 units	210 units	n/a	248 acres
UC MBEST/Airport Business Park Plan	n/a	n/a	1.5 million s.f. of office, R&D, and public facilities	150 acres
CSUMB Master Plan	3,820 student beds	n/a	0.5 million s.f. of academic space	120+ acres
Downtown Vitalization Specific Plan	<i>2,400 units (studied under EIR)</i>	<i>n/a</i>	250,000 s.f. of retail	270 acres
	9,867 units/beds	622 units	2.5+ million square feet	

Marina Station

- The plan includes 320 acres up against the northern Urban Growth Boundary/City Boundary. It was approved in 2008, and recently amended in 2022
- There are 1,360 total housing units
 - 887 single family units and 473 apartments
 - 272 are below-market-rate and 1,088 are market-rate
- The vision includes mixed-use development centered on three retail activity nodes with:
 - 60,000 square feet of retail
 - ~145,000 square feet of office
 - ~650,000 square feet of industrial
- The site remains vacant
- Phase 1/2 (351 units) expected to be issued permits in 2024 and 846 units remain in the pipeline



The Dunes

- The Dunes Specific Plan (formerly University Village), was approved in 2005 and covers 429 acres at the far southern end of Marina.
- There are a total of 1,237 total housing units
 - 614 single family and 623 multi-family/duplex
 - 140 units are below-market-rate and 1,097 are market-rate
- Approximately 525 units have been completed; leaving 712 units in the pipeline
- The plan includes mixed-use development (with a commercial emphasis)
 - 1.12 million square feet of retail
 - 760,000 square feet of office
 - 500 hotel rooms
- The 8th/9th St intended as future transit corridor
- There is a planned retail plaza and major N-S greenway, “The Promenade” which is currently under construction.



Sea Haven

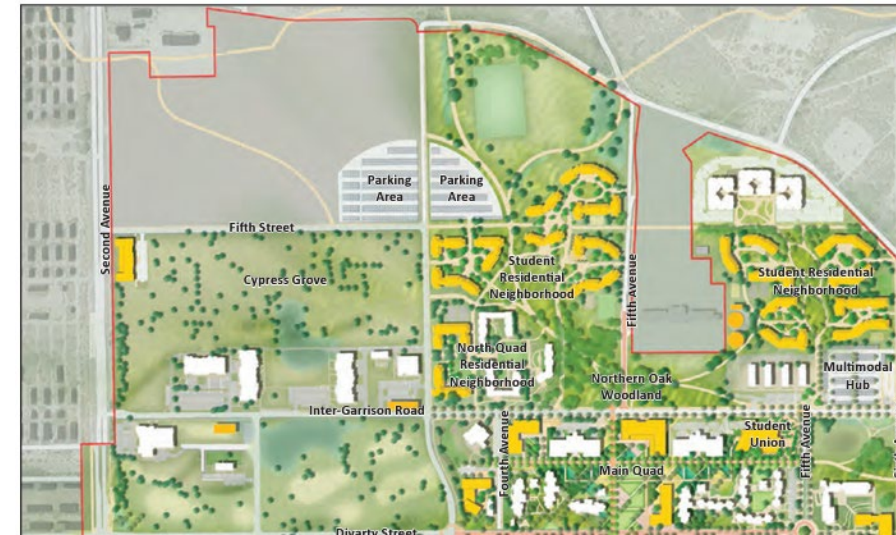
- Sea Haven (formerly Marina Heights) was approved in 2004
- It covers 248 acres adjacent to Central Marina
- The plan includes 1,050 total housing units:
 - 948 single family and 102 multi-family
 - 210 below-market-rate units and 840 market-rate units
- Approximately 439 units completed; leaving 472 housing units in the pipeline
- Several internal recreation centers/linear parks are built; Abrams Community Park and other major public parks have not yet been developed



Future Abrams Community Park

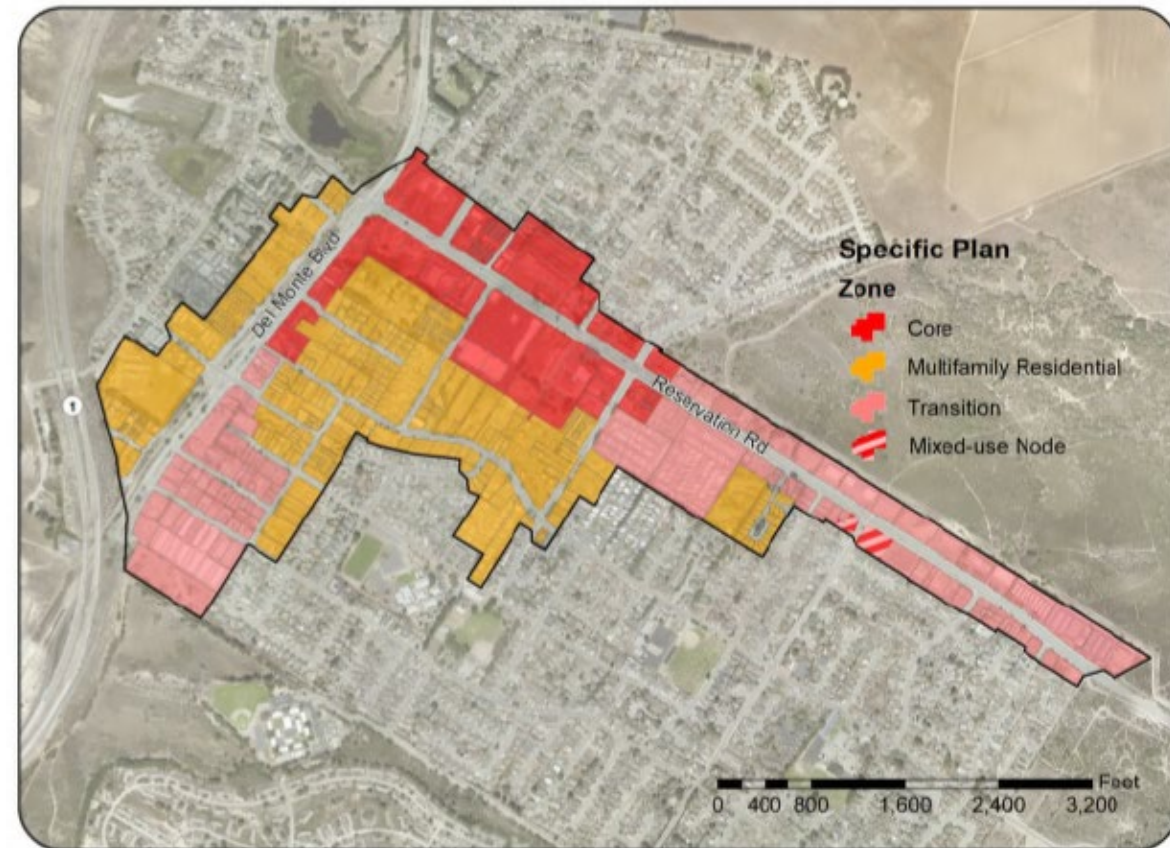
CSUMB Master Plan

- The Master Plan sets forth a vision for guiding physical development of the CSUMB campus; approximately 80+ acres have been developed
- The near-term developments are:
 - Student Housing Phase III (600 student housing beds)
 - Academic IV (95,000 GSF)
 - Student Recreation Center (70,000 GSF)
 - Student Housing Phase IIB (400 beds)
 - Academic V (76,700 GSF)
- The EIR analyzed an increase of approximately 6,066 FTE students and 752 FTE faculty/staff over existing. This is an increase of 3,820 student beds (60% housed on-site) by 2045. Potential additional student/faculty housing at Schoonover site (outside city limits).



Downtown Vitalization Plan (not yet adopted)

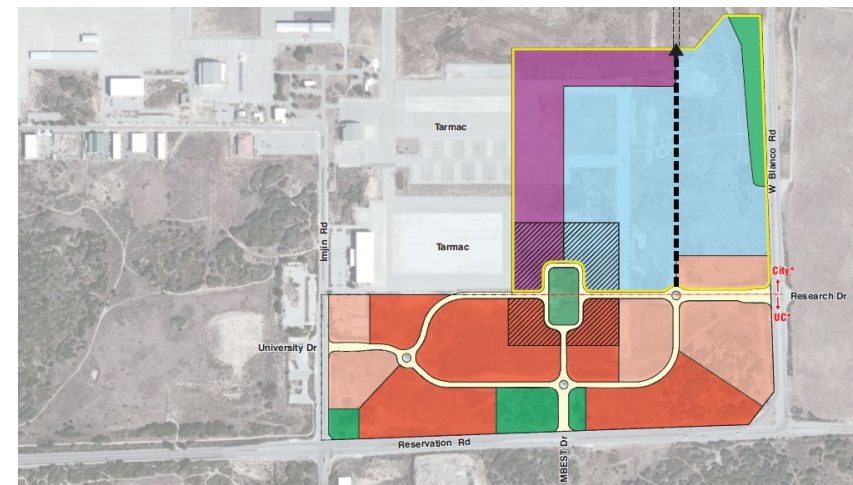
- The goal of the Plan is to encourage higher-density, mixed-use redevelopment of strip malls in the Downtown for Marina
 - Potential 2,400 new units studied under EIR within the General Plan's timeframe
- The plan includes 4 zones, with form-based elements:
 - Downtown Core (70 units/acre), five stories on Del Monte or Reservation, no residential on ground floor
 - Transition (50 unit/acre, three stories, mixed use and residential encouraged)
 - Mixed-Use Node (70 unit/acre, required retail on ground floor)
 - Multi-family Residential (25 – 39 unit/acre, depends on lot width)



Map 3-2. Land Use Plan.

Marina Municipal Airport Business & Industrial Park/UC MBEST/Airport Plan

- The plan covers a 150-acre area adjacent to the airport and was a collaborative effort between the City of Marina (City) and the University of California
- The vision of the plan was to generate revenue to support the airport, combined with economic development associated with aviation and manufacturing
- The uses identified include office, research and development, and public facilities with a total of 1.5 million s.f.
- The City's role was to develop a municipal airport; UC's role was to develop a technology center
- UC MBEST never developed aside from one small parcel—at the corner of Imjin and University Drive—and backbone roadway infrastructure



LEGEND - CITY*		LEGEND - UC*	
Commercial/Mixed Use - 3.55 ac	ROW - 3.50 ac	Commercial/Mixed Use - 19.01 ac	Research & Development - 37.64 ac
Business Park - 44.20 ac	Open Space - 4.84 ac	Research & Development - 4.50 ac	Campus Core Overlay - 4.50 ac
Business Aviation Reserve - 19.10 ac		Campus Core Overlay - 9.63 ac	ROW - 6.24 ac
Campus Core Overlay - 6.50 ac			
Research and Development Overlay Zone - 78.19 ac			
Possible Roadway Connection (for illustrative purposes only)			

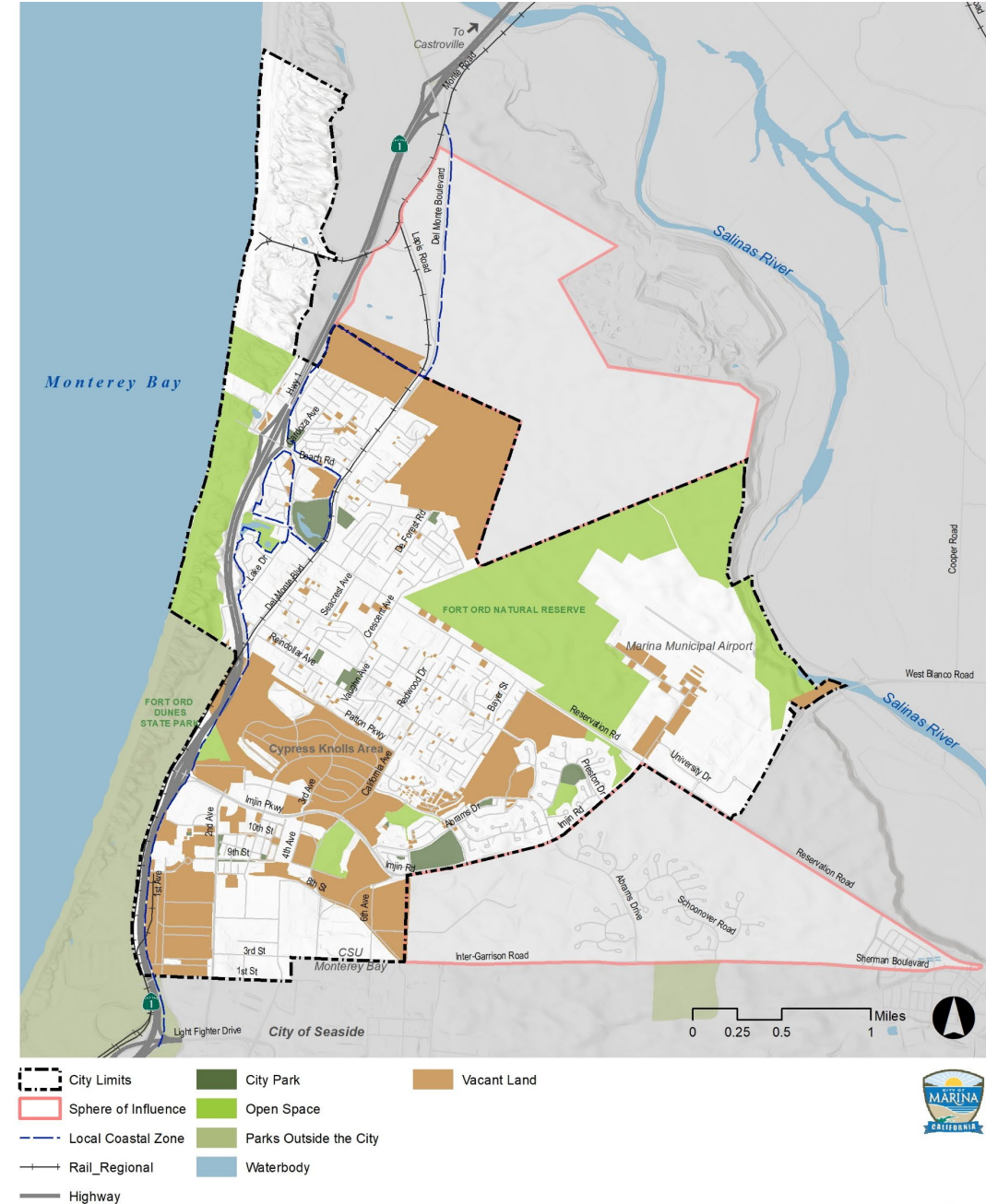
Growth and Development

Growth and Development

This section covers the potential for growth and change across Marina by analyzing the character of existing development, and the projections/potential for future growth in Marina.

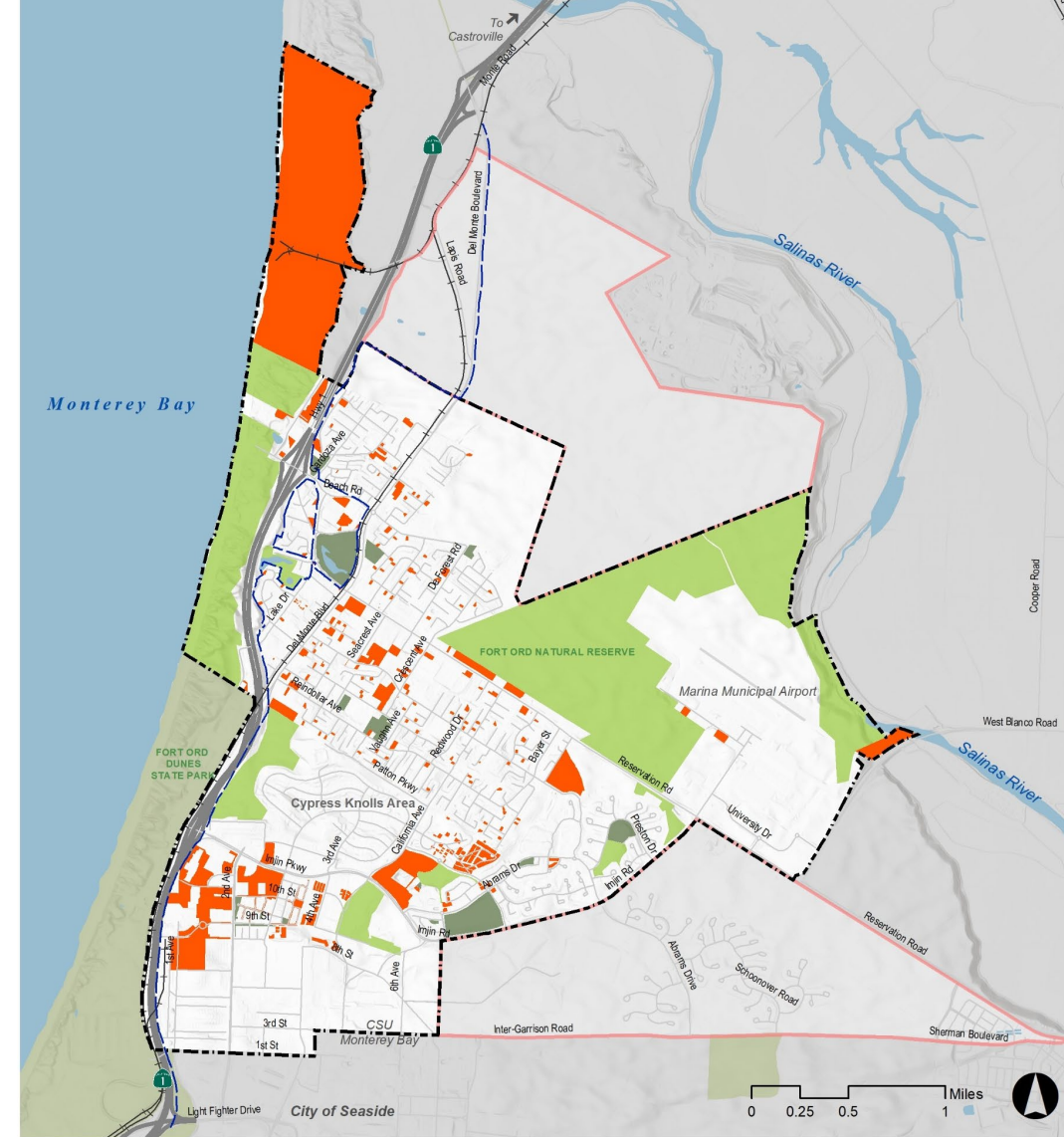
Vacant Land

- The City has over 1,200 total acres of vacant land.
 - Much of this land is located within adopted Specific Plan areas, and therefore has entitlements for potential future development.
- A large portion of the vacant land is in the former Fort Ord area. This land was inherited by the City after the Base Closure in 1994.
 - Some of this land still contains uninhabited base housing. Soil contamination is a concern on many of these lands.



Underutilized Lands

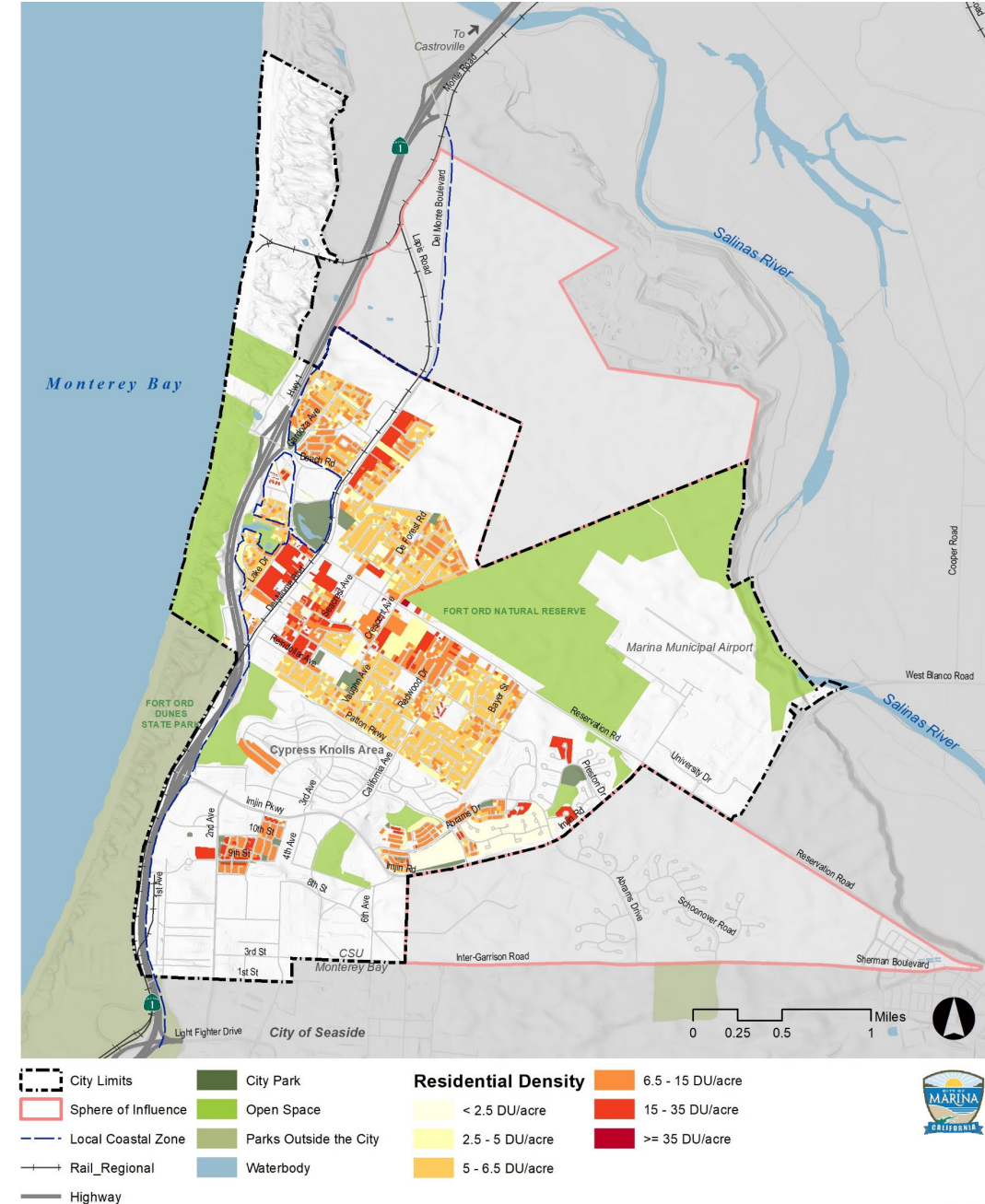
- Roughly 700 acres or 13% of the City's land are underutilized (defined as having a low improvement to land value ratio)
- Underutilized lands include much of yet-to-be-redeveloped former Fort Ord areas, the CEMEX plant, and many commercial-zoned parcels in Central Marina



Residential Density

Residential density varies significantly across Marina

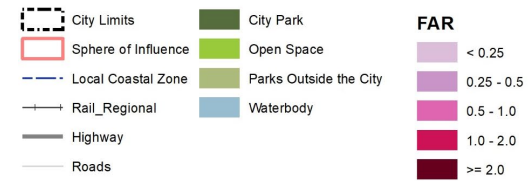
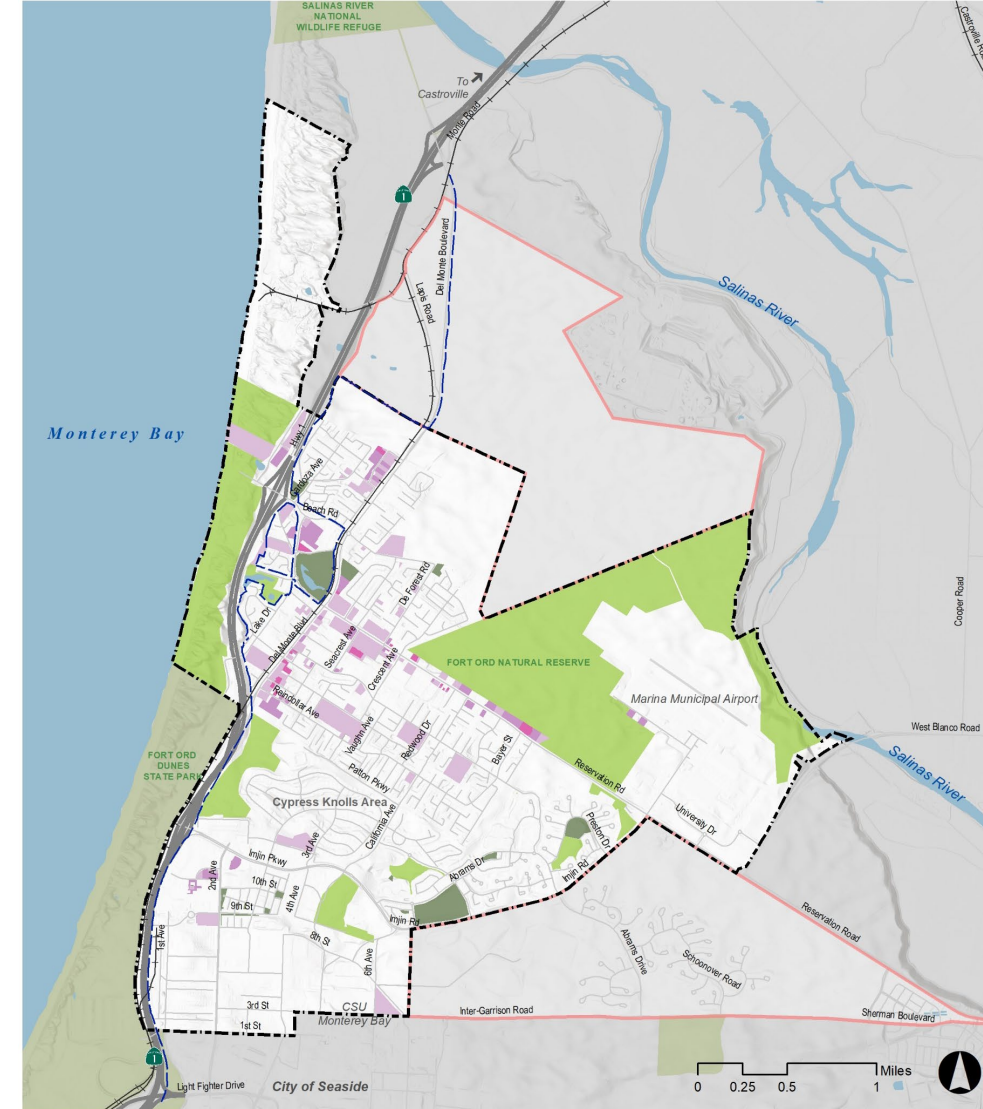
- Higher densities tend to be focused along Del Monte Boulevard (20-30 du/acre) and near the Dunes, which may suggest opportunities for transit and streetscape improvements
- Newer master plan areas are mostly 6-8 du/acre with a few higher density nodes
- Older single-family parts of town are generally 5 dwelling units per acre
- Abrams and Preston Park are developed in low-density military housing fashion (2-3 du/acre)




Commercial Floor Area Ratio (FAR)¹

Commercial intensities across Marina are consistently low (at or below 0.25 FAR), which limits the type of businesses and jobs attracted to the City.

- Median FAR is around 0.25 (one quarter of the lot is developed at one story)
- Essentially no development exists over 1.0 FAR, which is expressed through the very limited number of office buildings
- A few zero-lot line retail businesses and recent hotels have higher FARs of between 0.5 to 0.75



City of Marina (2023); County of Monterey (2023); CPAD(2021); Urban Footprint (2023); ESRI (2022); USGS & NOAA (2016)

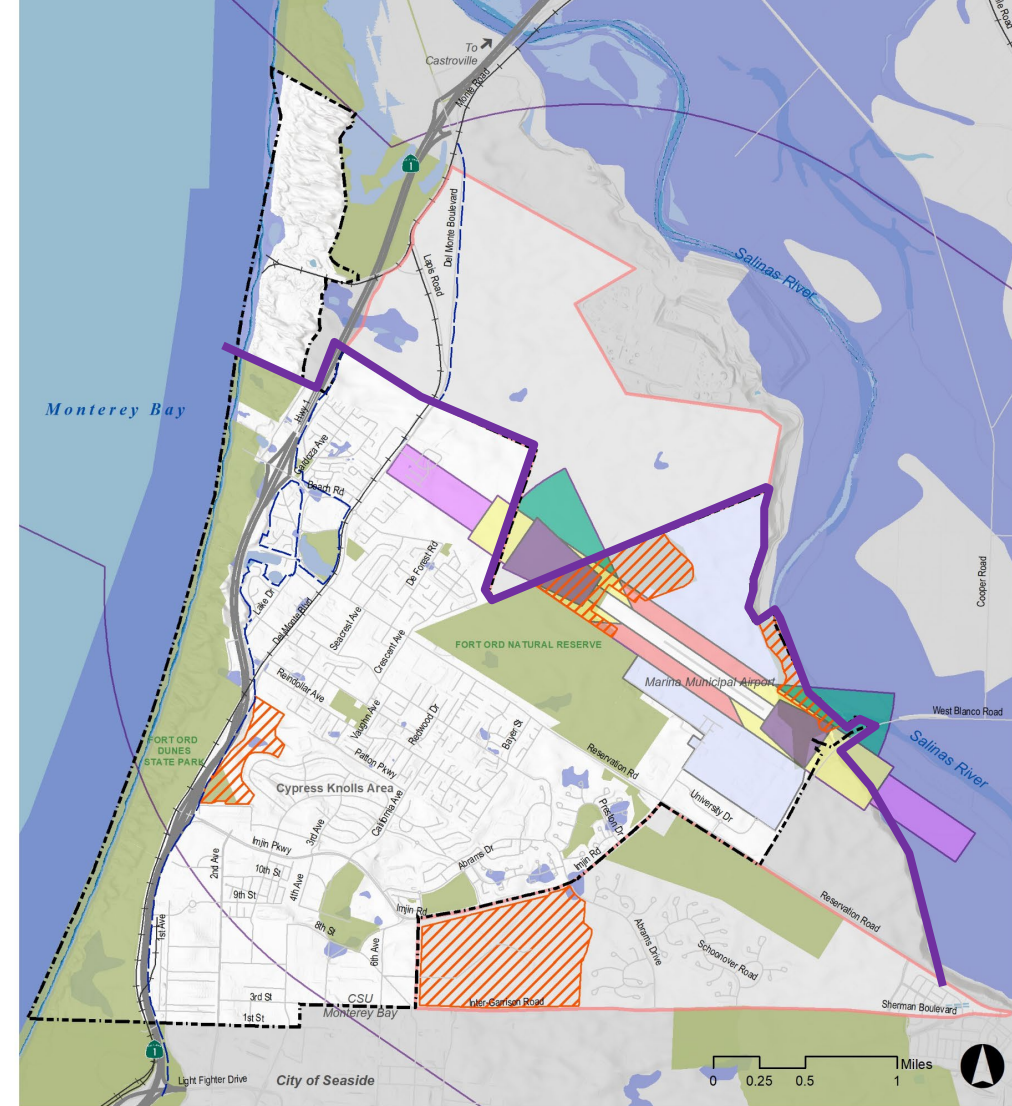


¹ The relationship between a building's floor area and the total lot or parcel size.

Key Development Constraints

Several considerations related to future development include:

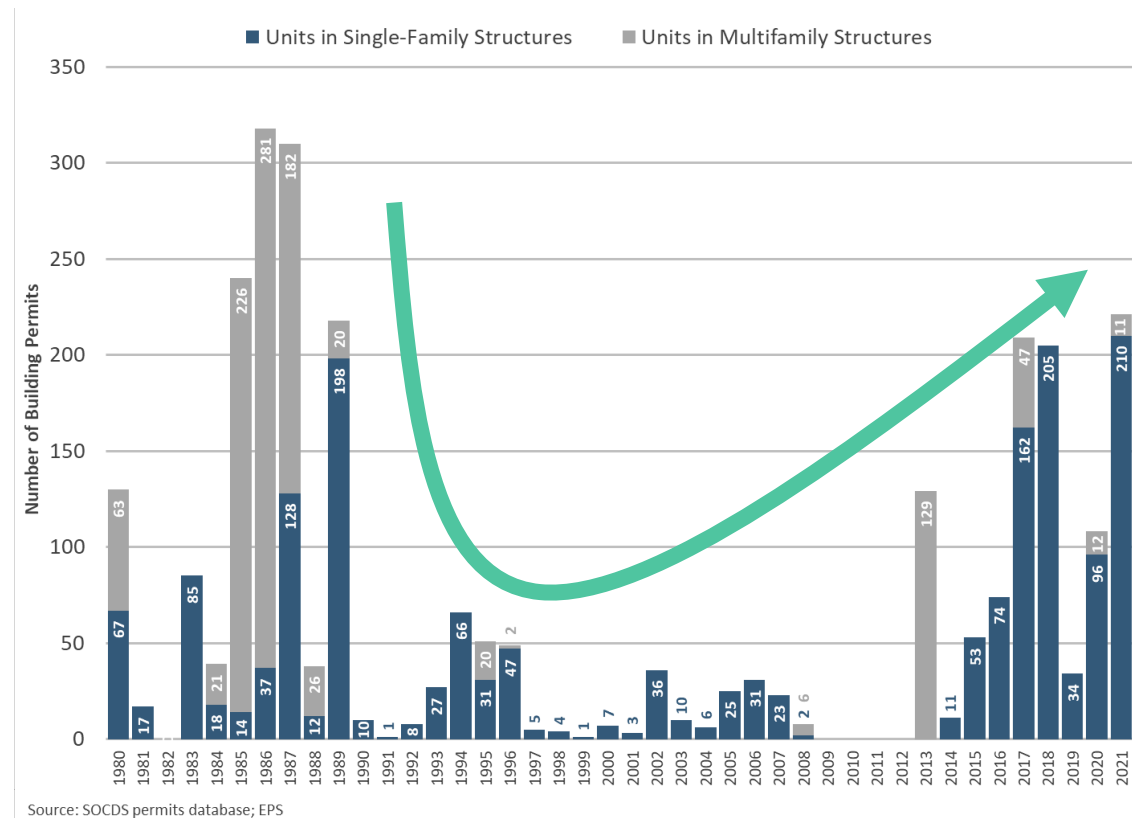
- **Natural Constraints:**
 - a. Habitat Management Area and Protected Open Spaces (development not currently permitted)
 - b. Coastal erosion/inundation zones
 - c. Protected species (including sand gilia)
- **Policy Constraints:**
 - a. Urban Growth Boundary (UGB) restricts development beyond the established boundary.
 - b. Airport safety zones include limitations on land use and height of development within AZs.
 - c. Local Coastal Program - requires local permit review and in some cases, Coastal Commission Review



Sources:
 City of Marina (2023); County of Monterey (2023);
 CPAD(2021); Urban Footprint (2023);
 ESRI (2022); USGS & NOAA (2016).

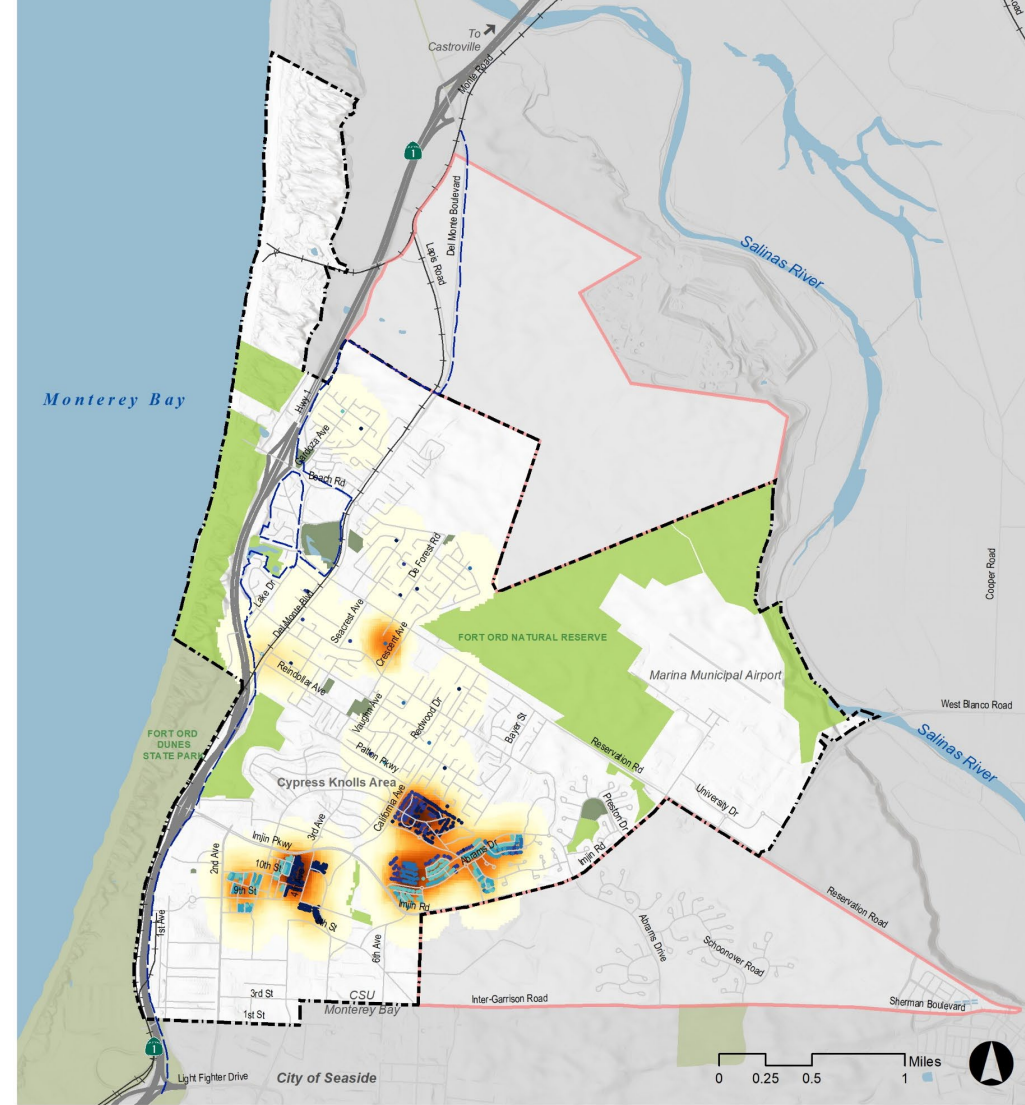
Development Trends

- Most of the City's housing stock dates to the 1960s
 - Brief boom of residential construction in the 1980s
 - Resurgence of residential development within master-planned areas in 2010s and today
- Regionally, Marina has experienced the highest household growth (7%)
 - 700+ building permits in 2010s
 - Dominated by single-family for-sale (90% of new units)
- The multifamily rental market has not similarly grown
 - Less than 80 units built since 2014
 - 160+ units currently entitled



Pipeline Development

- There is a combined total of 3,647 housing units entitled in Marina Station, Sea Haven, and Dunes
 - Sea Haven and Dunes have built a combined 900+ housing units to date; Marina Station has not started to develop)
 - A total of 2,169 units are entitled but not yet built from from approved plans
- Marina has built roughly 150 single-family units and 20-25 multi-family (or townhouse) units per year over the past five years (2018-2022)



Sources:
 City of Marina (2023); County of Monterey (2023);
 CPAD(2021); Urban Footprint (2023);
 ESRI (2022); USGS & NOAA (2016)

Recent Multifamily Development

- This list includes all multifamily development projects in last ten years (dating back to 2014):

Name	Address	Type	Units	Approved	Status
Scott Green Project	3303-3309 Marina Dr	Market	18	2016	Constructed 2019
Mosaic Apartments	225 Cypress Ave	Student	12	2019	Constructed 2022
Junsay Oaks Senior Apts.	3098 DeForest Rd	Senior/Affordable	<u>47</u>	2012	Constructed 2020
			77		
Seacrest Apartments	3108 Seacrest Ave	Market rate	10	2018	Under Construction
Schulman Townhomes	3110 Seacrest Ave	Market rate	<u>7</u>	2020	Under Construction
			17		
Veteran's Transition Center Supportive Housing	229 - 239 Hayes Circle	Supportive/Afford.	71	2018	Entitled, not constructed
Motel Redevelopment	3298 Del Monte	Market rate	94	2021	Entitled, not constructed
The Shores at Marina	3125 DeForest Ave.	Market rate	<u>68</u>	2018	Entitled, not constructed
			223		
		TOTAL	317		

Growth Projections from 2000 General Plan

- The 2000 General Plan projected that the City's population would reach 38,000-40,000 by 2020, including the Schoonover housing area and CSUMB's new housing
 - The 2000 General Plan projected an increase of approximately 15,700 to 17,400 new residents (excluding CSUMB students on the main campus)
 - This General Plan projection would have nearly doubled the population size by 2020: between 82 – 91% population growth, at an average annual growth rate of 4 - 4.6%
 - The 2000 General Plan's land use policies allow for approximately 6,800 new or rehabilitated housing units
 - 95% of this new housing was expected in two areas: (1) Armstrong Ranch (Marina Station); and (2) the portion of former Fort Ord within the City's municipal boundaries and Sphere.
- Actual growth realized by 2020 fell significantly short of the 2000 General Plan projection – the 2022 population was estimated at 22,500 (ACS)

Sub-Area Growth Projections from 2000 General Plan

- The 2000 General Plan projected that 4,700 new housing units would be built in former Fort Ord areas including Marina Heights, Cypress Knolls, the Dunes, and CSUMB (70% of projected future housing growth)

Growth Projections for Fort Ord alone

Plan Subarea (2)	Units
Marina Heights-Abrams Park (replacement/new units and rehabilitated multi-family units)	1,244
Cypress Knolls—Patton Park (replacement/new senior housing and new multi-family housing)	712
University Villages	837
University Villages	400 (3)
Subtotal	3,193
UC Multiple-Use Areas	330
CSUMB: Frederick-Schoonover Park	170
CSUMB: North Quad	1,025
Total	4,718

Regional Growth Projections

- AMBAG forecasts Marina's population to grow by about 8,500 over the next two decades, with an estimated population of approximately 30,044 in 2045.
 - This is an increase of approximately 1,500 additional units (excludes student beds)
- AMBAG forecasts that there will be approximately 725 new jobs by 2045.
- CSUMB expects growth of 5,800 full-time equivalent students by 2045, or 3,820 new beds assuming 60% of new students are housed on site.
 - The 2000 General Plan projection for CSUMB was only 1,025 additional beds.
- The 6th Cycle RHNA (2023-2031) identified a need to accommodate 685 new units, which will be met easily by the City's Housing Element.
 - The Housing Element identified three times this number of sites for a total of 2,263 housing units (113 very low-, 110 low-, 157 moderate-, and 1,883 above moderate-income housing units), though will not require rezoning for the 6th cycle (2023-2024).

Regional Growth Projections (AMBAG)

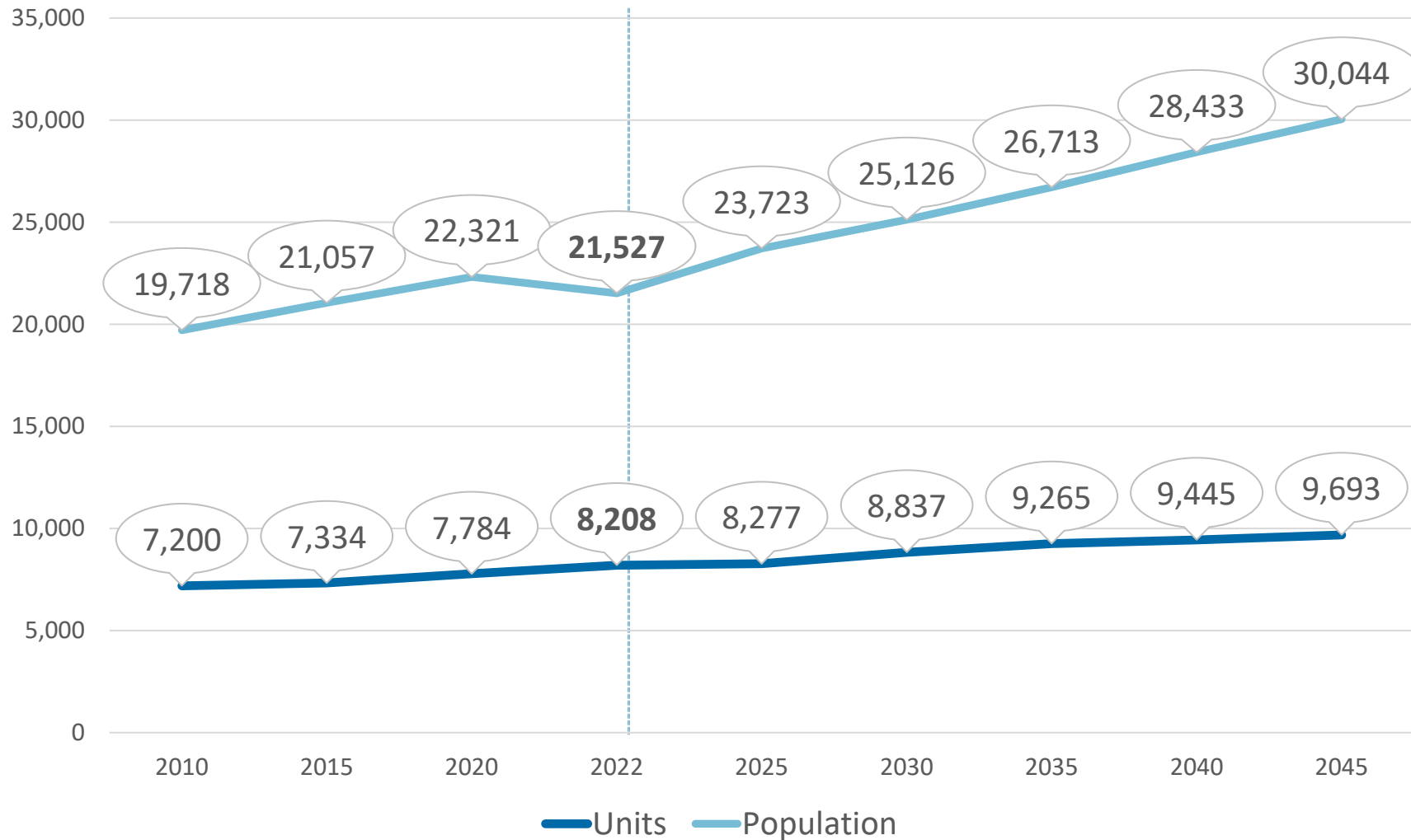
- The following 2 slides provide a breakdown of regional growth projections:

	Past			Current	Projected						
	2010	2015	2020	2022	2025	2030	2035	2040	2045	% change 2022-2045	Total change
Units	7,200	7,334	7,784	8,208 ¹	8,277	8,837	9,265	9,445	9,693	+18.1%	+1,485
Population	19,718	21,057	22,321	21,527 ¹	23,723	25,126	26,713	28,433	30,044	+41.3%	+8,517
Marina only	19,084	20,037	21,371	--	22,293	22,841	23,238	23,768	24,237	+13.4%	+2,866
CSUMB	634	1,020	950	--	1,430	2,285	3,475	4,665	5,807	+511%	+4,857
Jobs	--	6,107	6,548	6,491 ²	6,621	6,765	6,899	7,055	7,217	+11.2%	+726

¹ California Department of Finance, E-05, 2022

² ACS 2021 5-Year Estimates B08604

Regional Growth Projections (AMBAG)



Sub-Area Growth Projections (Housing)

The following table summarizes anticipated housing development from adopted specific plans plus future specific plans, plus infill in existing neighborhoods through the 2045 General Plan timeframe:

Sources: Draft 2023 Housing Element, Draft Downtown Vitalization Specific Plan, UWMP, CSUMB MP FEIR

	Analyzed	Permitted	Built (2023)	Remaining
Downtown Vitalization Plan	2,400	179 ¹	12 ²	2,209
Central/North Marina infill	389 ³	-	10 ⁴	379
	Entitled	Permitted	Built (2023)	Remaining
Marina Station SP	1360	-	-	846 ⁵
The Dunes SP	1237	-	525	712 ⁶
Sea Haven MP	1050	-	439	611 ⁷
Cypress Knolls Plan Area	841 ⁸	71 ⁹	-	773
CSUMB Master Plan	3,820 ¹⁰	-	220 ¹¹	3,600
<i>Entitled subtotal</i>	<i>8,311</i>	<i>71</i>	<i>1,184</i>	<i>6,542</i>
Total	11,100	250	1,206	9,130

- 1 3298 Del Monte, 3125 DeForest, Seacrest, and Schulman Townhomes
- 2 Mosaic Apartments
- 3 Estimate from DVP and 2020 UWMP (excludes DVP area)
- 4 ADUs
- 5 Phases 1-4 to occur during GP timeframe; 351 units under permit review
- 6 140 BMR units permitted, other 572 units under permit review
- 7 None of the 210 BMR units have been built; unknown if under permit review
- 8 2010 EIR for Cypress Knolls RDA
- 9 VTC Supportive Housing
- 10 Beds per CSUMB MP FEIR 2017
- 11 The Promontory project

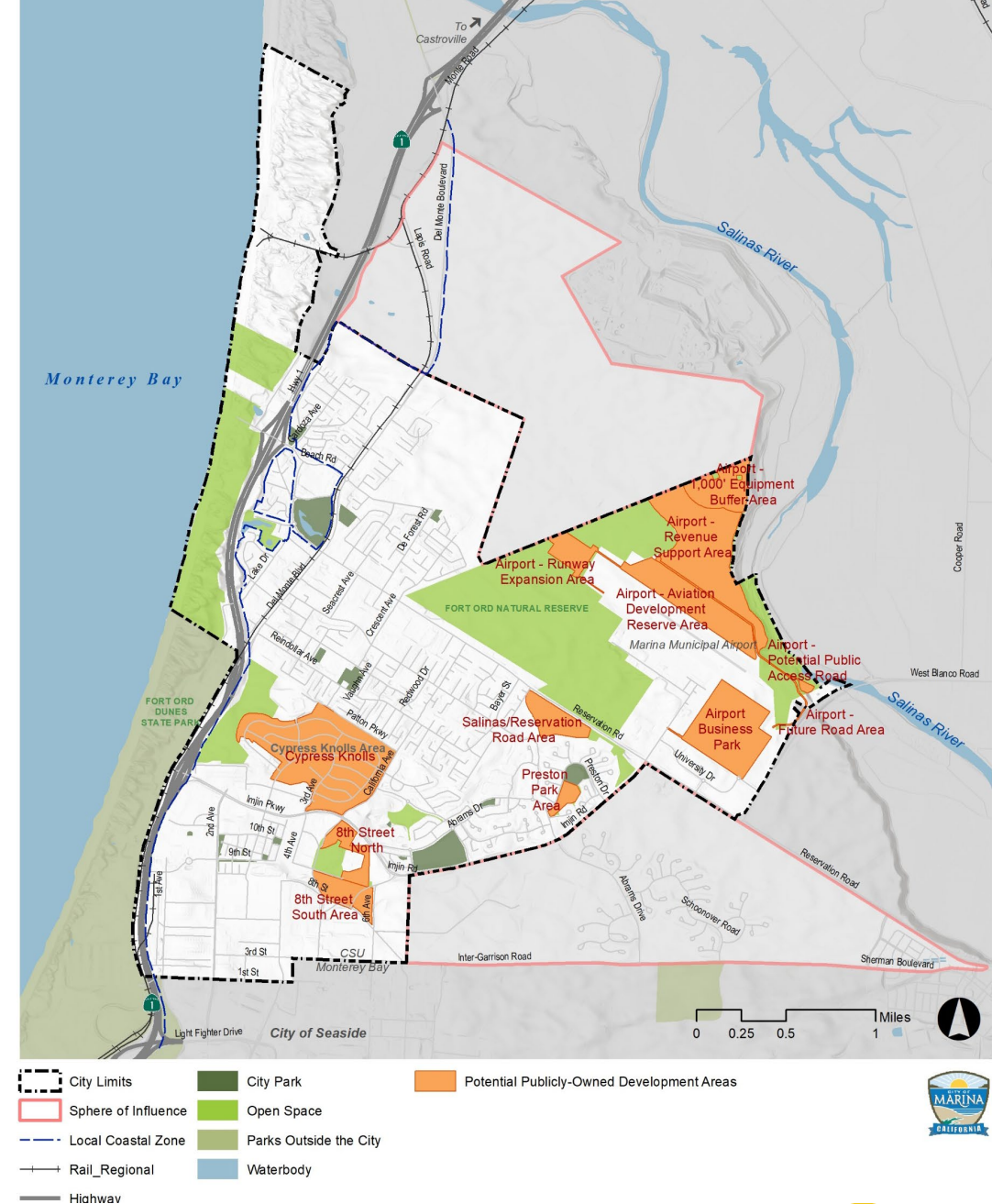
The total remaining permitted + entitled/studied total of 9,100 units/beds is significantly higher than the AMBAG 2045 projection of 1,500 additional units.

Note: The City is currently working on pre-approved ADU building plans which could increase ADU infill in Central/North Marina.

City-Owned Vacant Areas

Future development opportunities may exist within several former Fort Ord lands which are now owned by the City:

- 8th Street North (relatively small and oddly shaped area, could be for new jobs)
- 8th Street South (potential office or university-compatible uses, but poor visibility for retail)
- Airport Business Park Area (Specific Plan area that hasn't been developed as anticipated)
- Airport Revenue Support Area/Aviation Development Reserve Area (potential microgrid or Joby expansion)
- Salinas/Reservation Road Area (gateway site, disc golf, retail, good access, lots of gilia)
- Preston Park Area (potential affordable housing project site)



Potential Annexation Areas

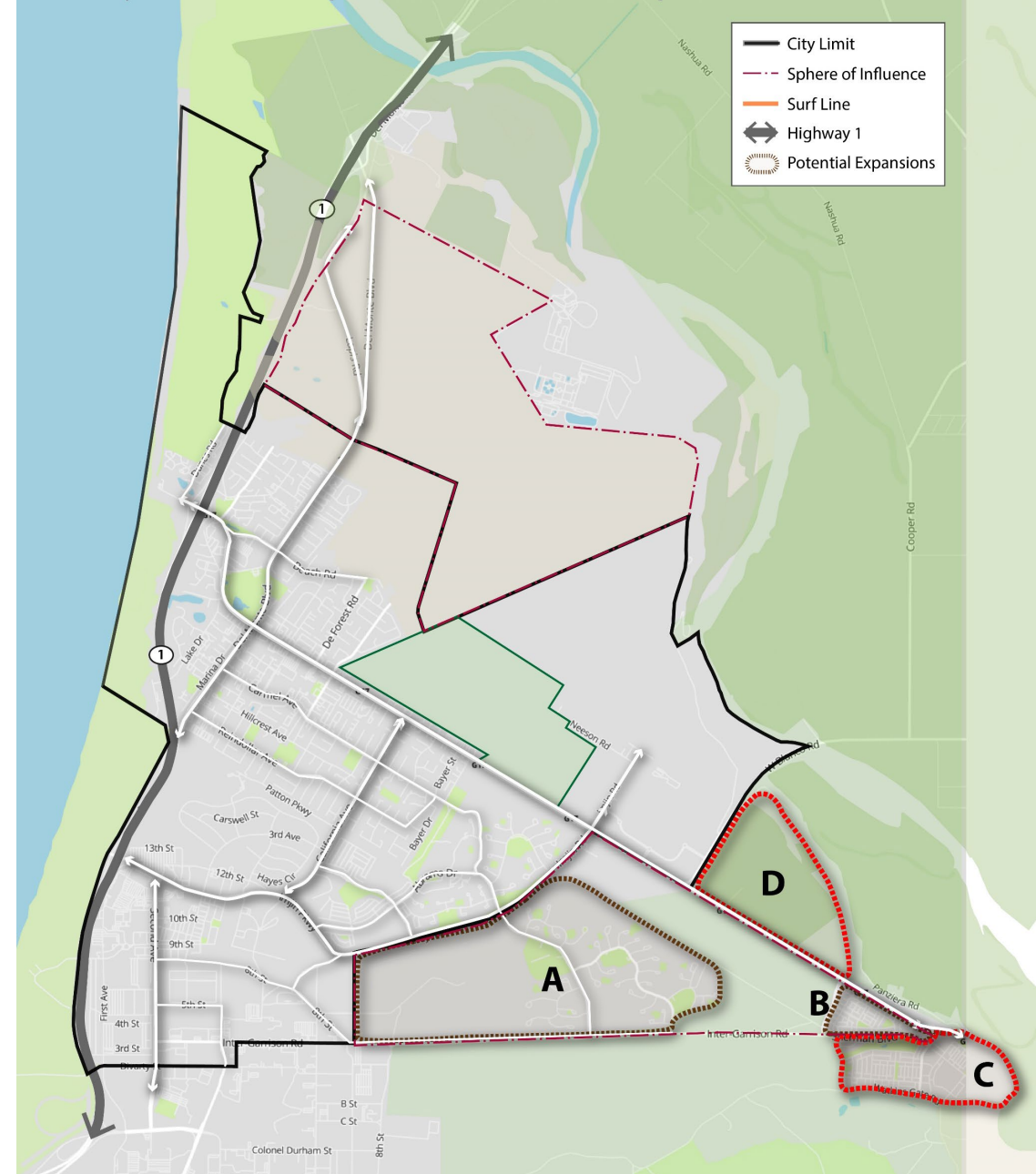
The following areas have been formally and informally discussed for potential annexation:

Inside Sphere of Influence:

- A. East Campus (Schoonover Apartments)/Landfill
- B. East Garrison, north of Sherman

Outside Sphere of Influence:

- C. East Garrison, south of Sherman
- D. UC MBEST Campus Expansion



Urban Form and Character

Urban Form and Character

This section provides an overview of the structure, scale, density, and other features of the Marina that make up the urban environment. It includes topics that describe the urban form and character of the community.

City Structure

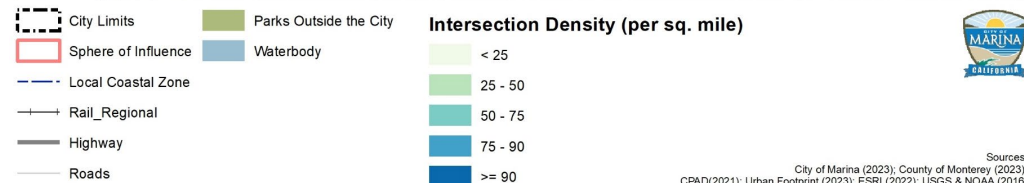
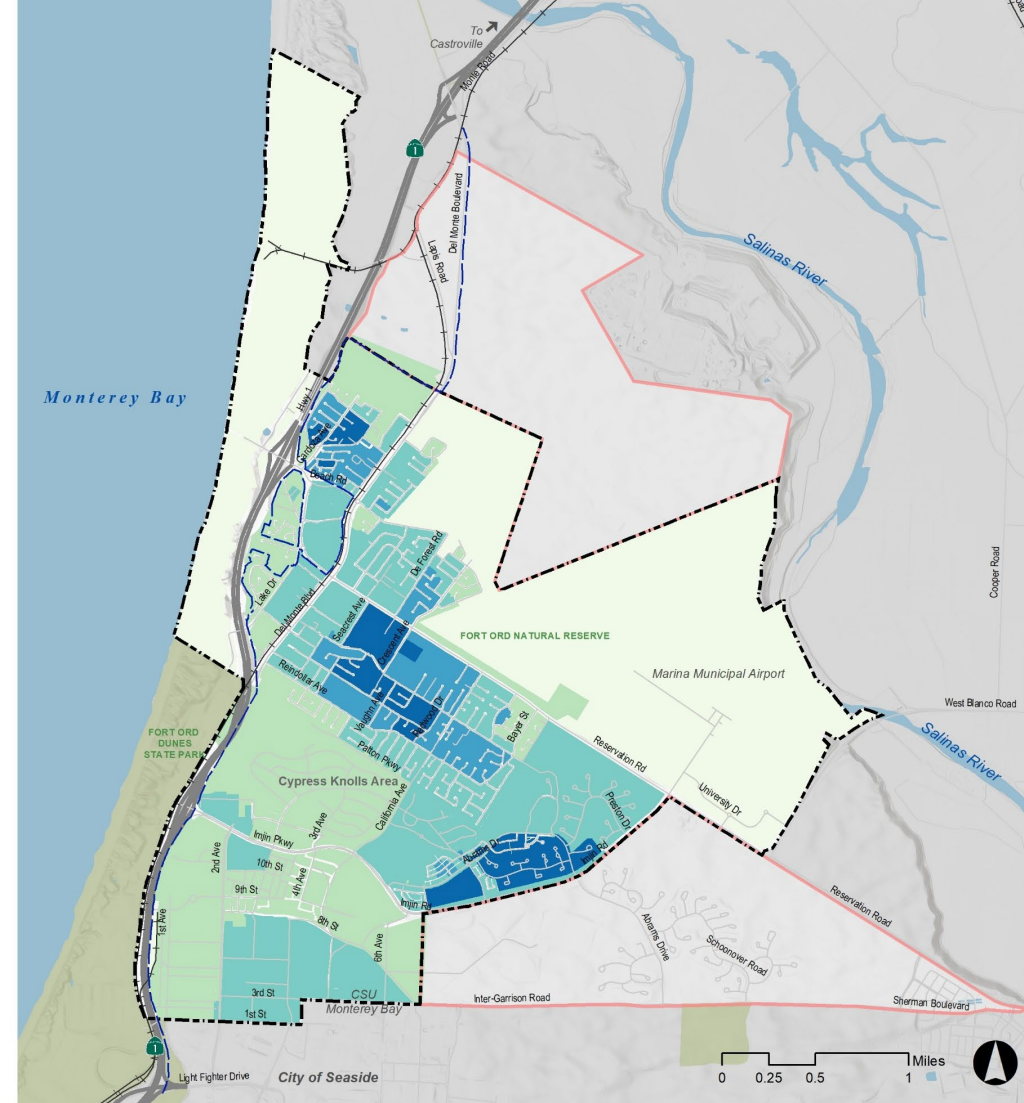
Described below is an overview of the key components that make up Marina's existing city structure.

1. *Edges* which distinguish the City from other urbanized areas.
2. *Travel corridors* which establish the physical framework of the City and make its organization apparent to residents and nonresidents.
3. *Open spaces and natural features* which retain the relationship to significant natural characteristics of the region and which contribute another level of coherence to the overall pattern and form of the City.
4. *Neighborhoods and districts* which are readily identifiable within the larger city setting and thus further contribute to its overall image.

Intersection Density

Intersection density indicates roadway connectivity and block size across neighborhoods and districts. Areas with a high intersection density are more walkable and areas with a low intersection density are less walkable.

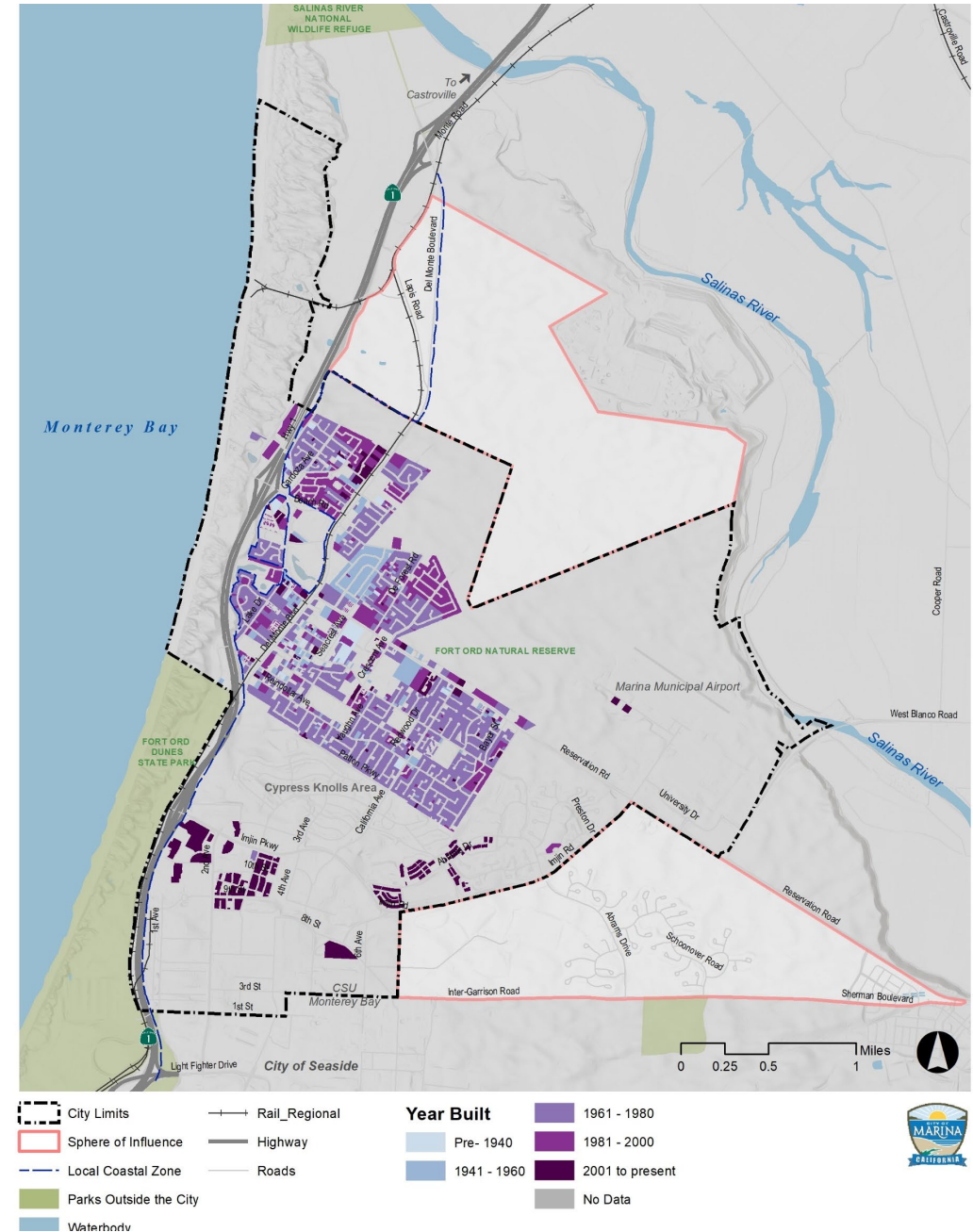
- Intersection density is highest in Central Marina near the envisioned downtown district (DVSP area)
- Overall, density is neither urban nor rural but mostly suburban



Sources:
City of Marina (2023); County of Monterey (2023); CPAD(2021); Urban Footprint (2023); ESRI (2022); USGS & NOAA (2016).

Year Built

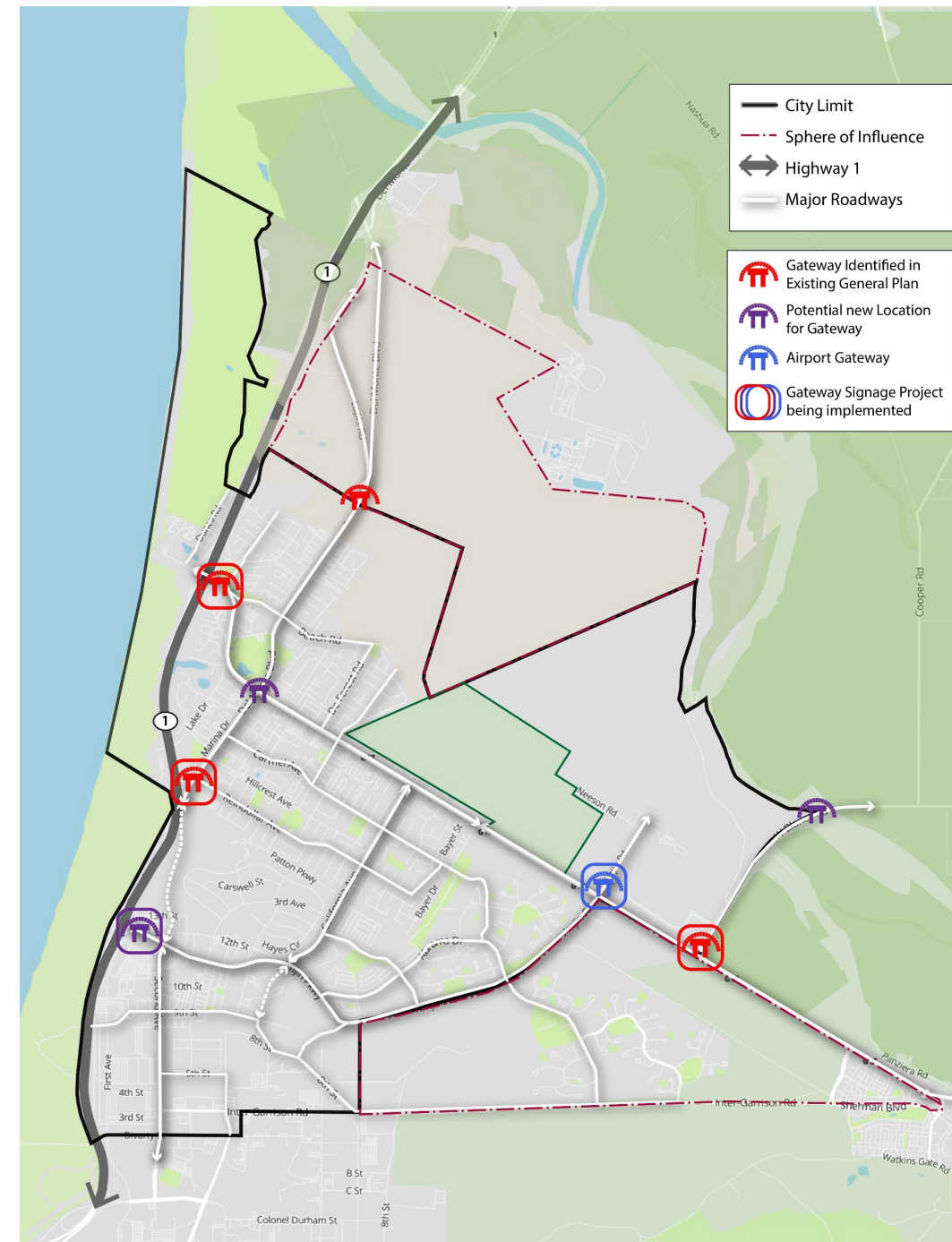
- Most of the City's housing stock dates to the 1960s.
- Most of Marina's multi-family residential stock was developed in the 1980s.
- Development outside of central Marina has occurred since the 2010s.



Gateways

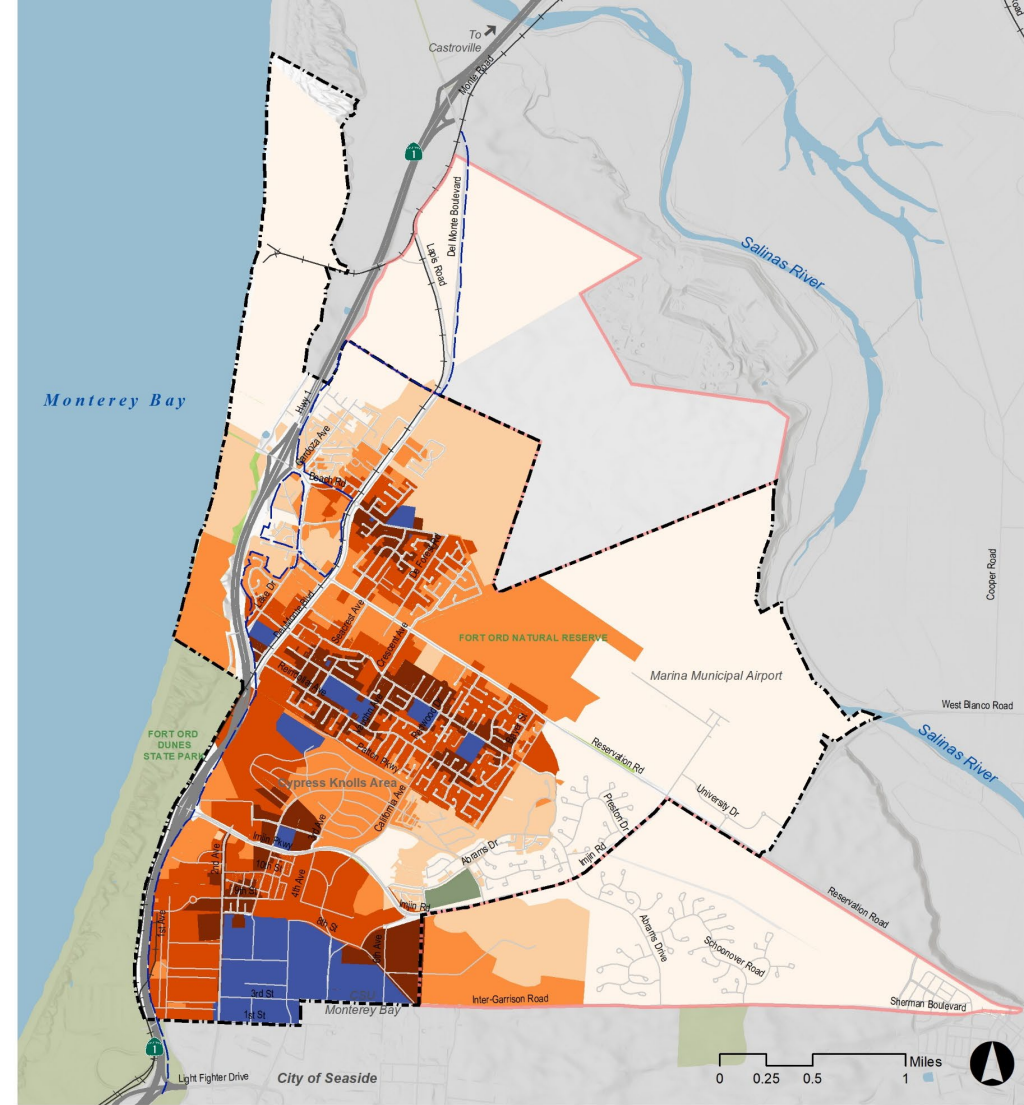
- The existing General Plan identifies the following gateways:
 - (1) Reservation Road at Highway 1 (primary)*
 - (2) Blanco Road at Reservation Road*
 - (3) Del Monte Boulevard at Reindollar Ave*
 - (4) Del Monte Boulevard at the north edge of Marina Station
- Potential new locations for gateways include:
 - Imjin Parkway at Highway 1/Second Ave (primary)*
 - Reservation Road entrance to the Airport*
 - Blanco Road at the Salinas River bluff
 - Del Monte Boulevard at Reservation Road

* *Included in Gateway Signage Design Project*



Walk Access to Schools

- Everyone in Central Marina is within 10 minutes of a school
- North Marina has only one school that is within walking distance
- South Marina has no schools for children, but is proximate to both CSUMB and MPC education campus



Sources:
 City of Marina (2023); County of Monterey (2023);
 CPAD(2021); Urban Footprint (2023);
 ESRI (2022); USGS & NOAA (2016).

Demographics and Market Report

Income and Education

- Marina's median household income is \$78,795. This is lower than median income of Monterey County as a whole (\$82,013)
- 45% of Marina residents aged 25 and older have an Associate's degree or higher. This is higher than Monterey County as a whole (35%)



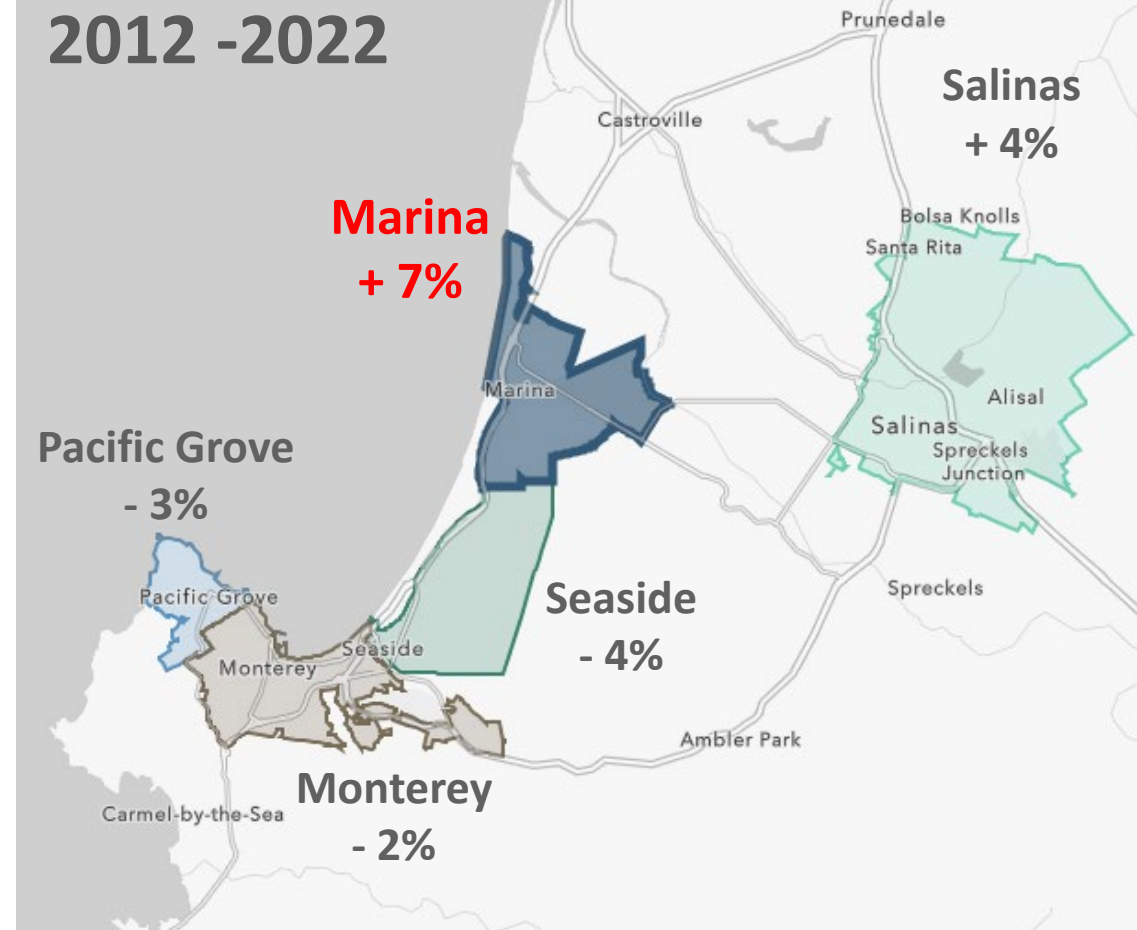
Source: ACS 2021

Relative Growth

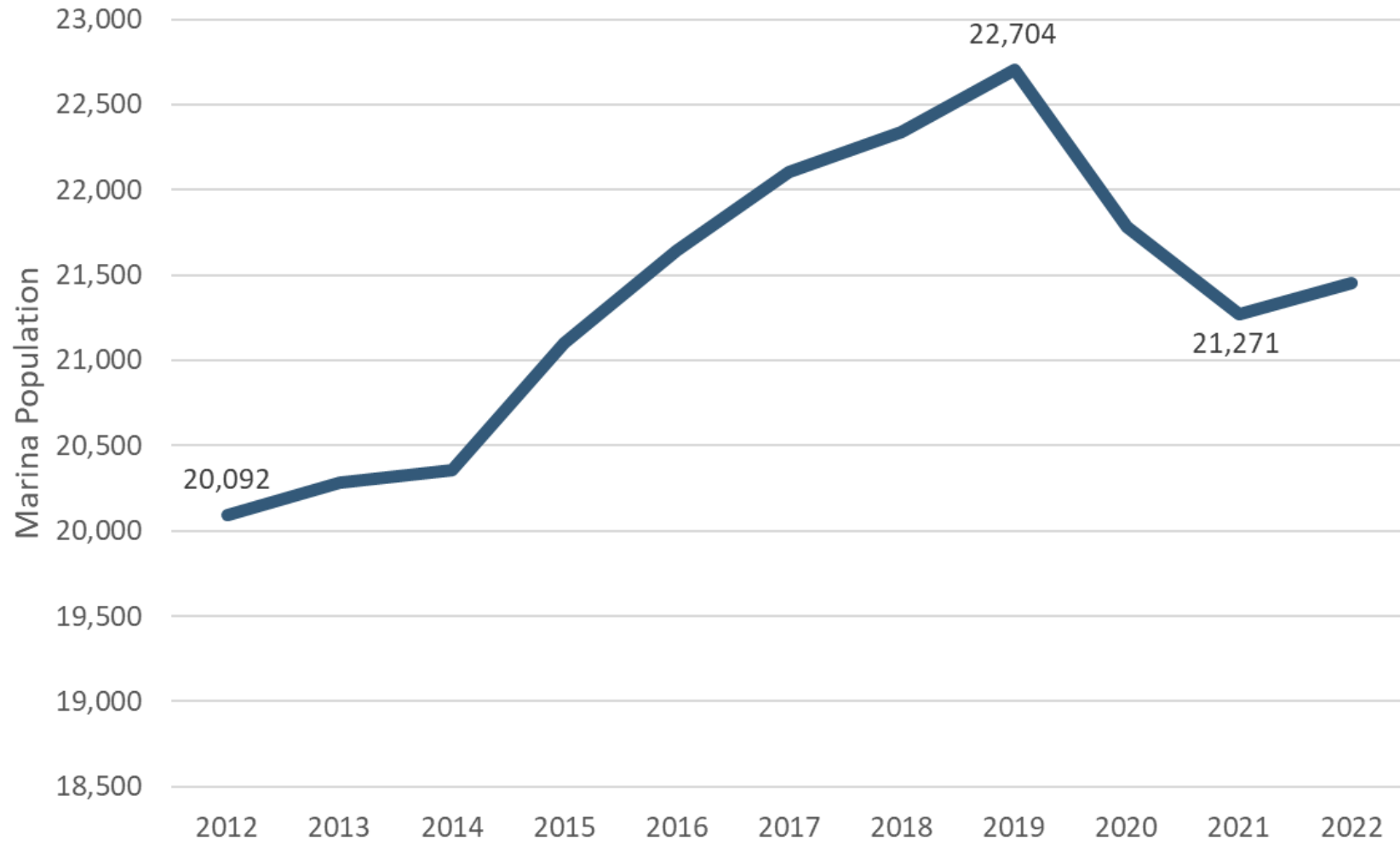
- Marina has experienced the greatest annual population and household growth rates over the past decade compared to selected peer jurisdictions and Monterey County overall.

City	2012 - 2022	
	Pop. Growth	% Change
Marina	1,365	+ 6.8%
Salinas	6,646	+ 4.3%
Monterey	- 469	- 1.6%
Pacific Grove	- 483	- 3.2%
Seaside	- 1,233	- 3.7%
County Total	11,095	+ 2.6%

Population Growth by City 2012 - 2022



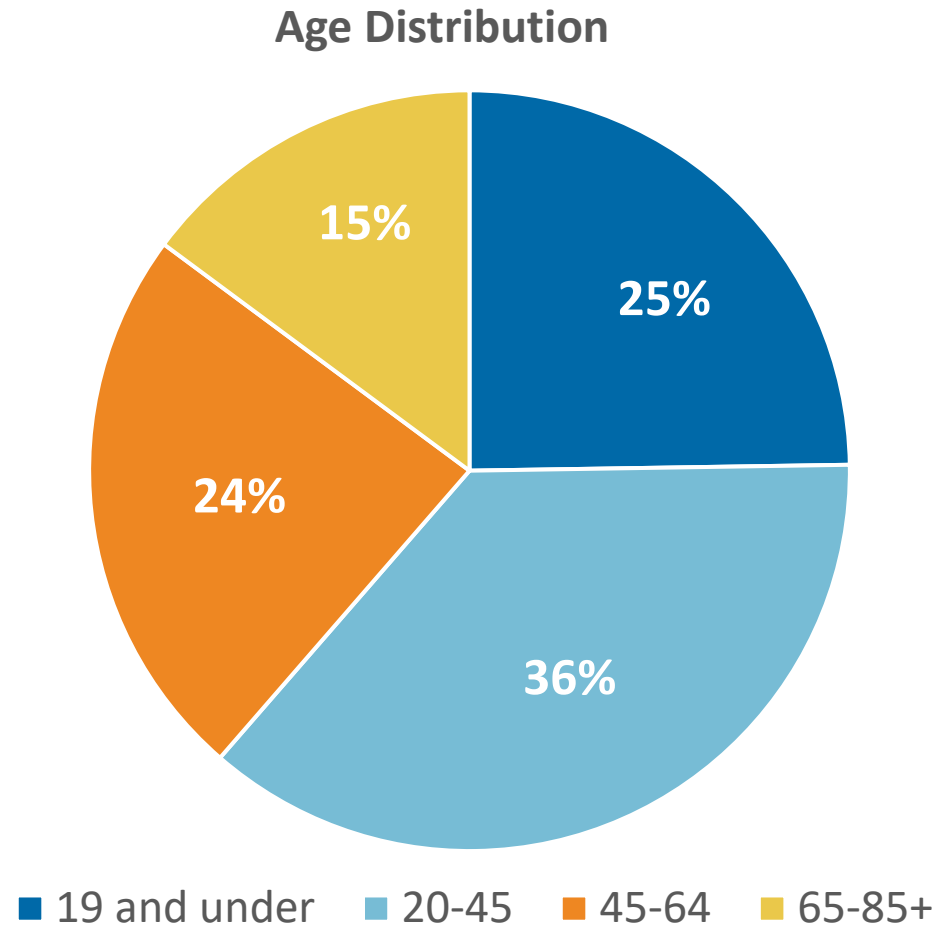
Population Growth Over Time



Source: State Dept. of Finance Population Estimates

Age

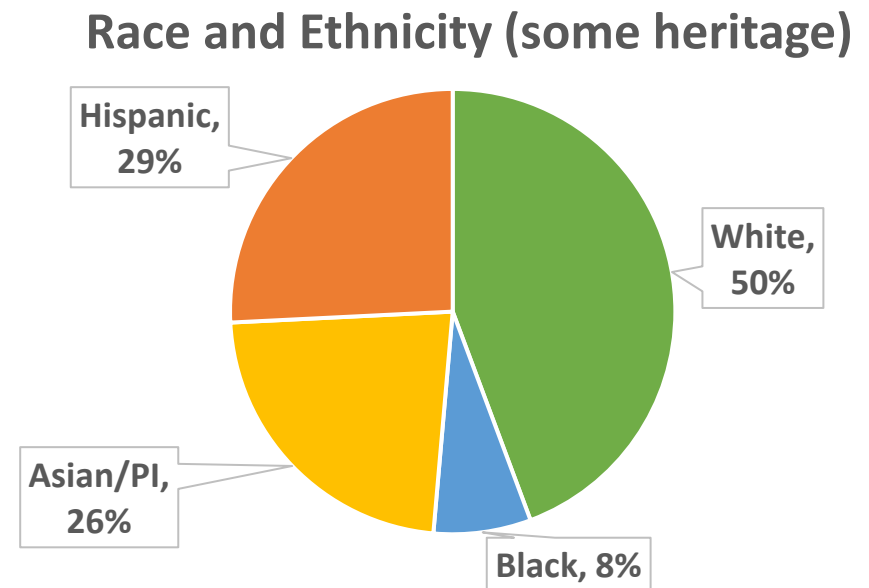
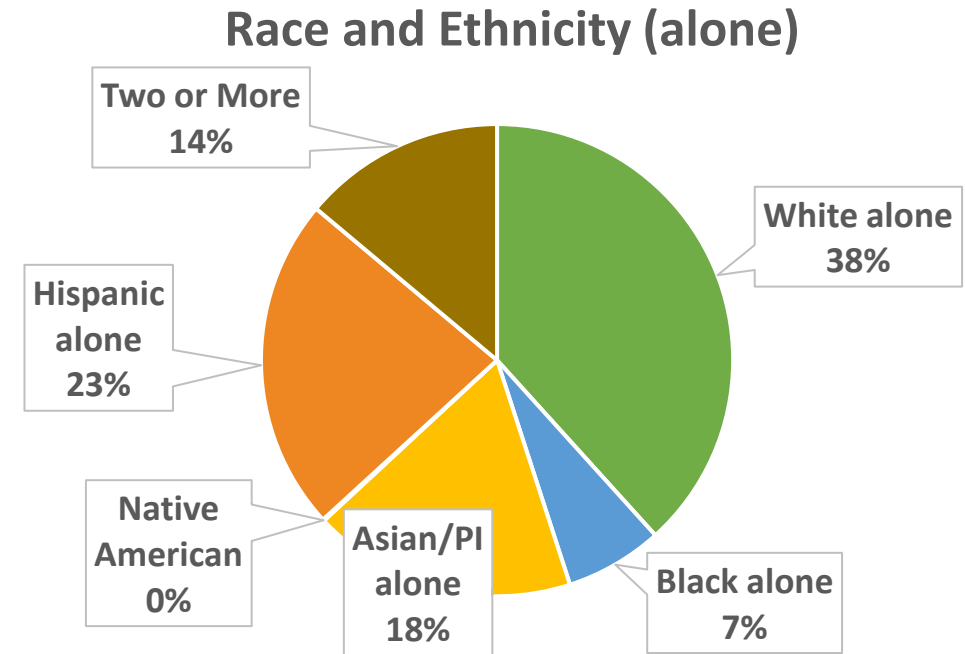
- Marina's demographics skew toward a younger, relatively well-educated population
- There are more individuals between age 20-45 than average (due to the presence of CSUMB)
- Since 2000, the percentage of senior population in the City has almost doubled from 7% to 14+%



Source: American Community Survey (ACS), 2021 5-Year Estimates DP05

Race and Ethnicity

- The racial composition of Marina differs from the countywide averages, with a higher proportion of whites and Asians and a lower proportion of Hispanic residents.



Income

- Household income in Marina is somewhat lower than in nearby areas (with a higher proportion of households in the lowest income bracket), likely due in part to local college students attending CSUMB who typically make lower wages or work part-time.
- Household incomes have grown notably over the past decade.
- Median household income in Marina has increased 22% from 2011-2021 in real terms, compared to only 10% in the county and State.

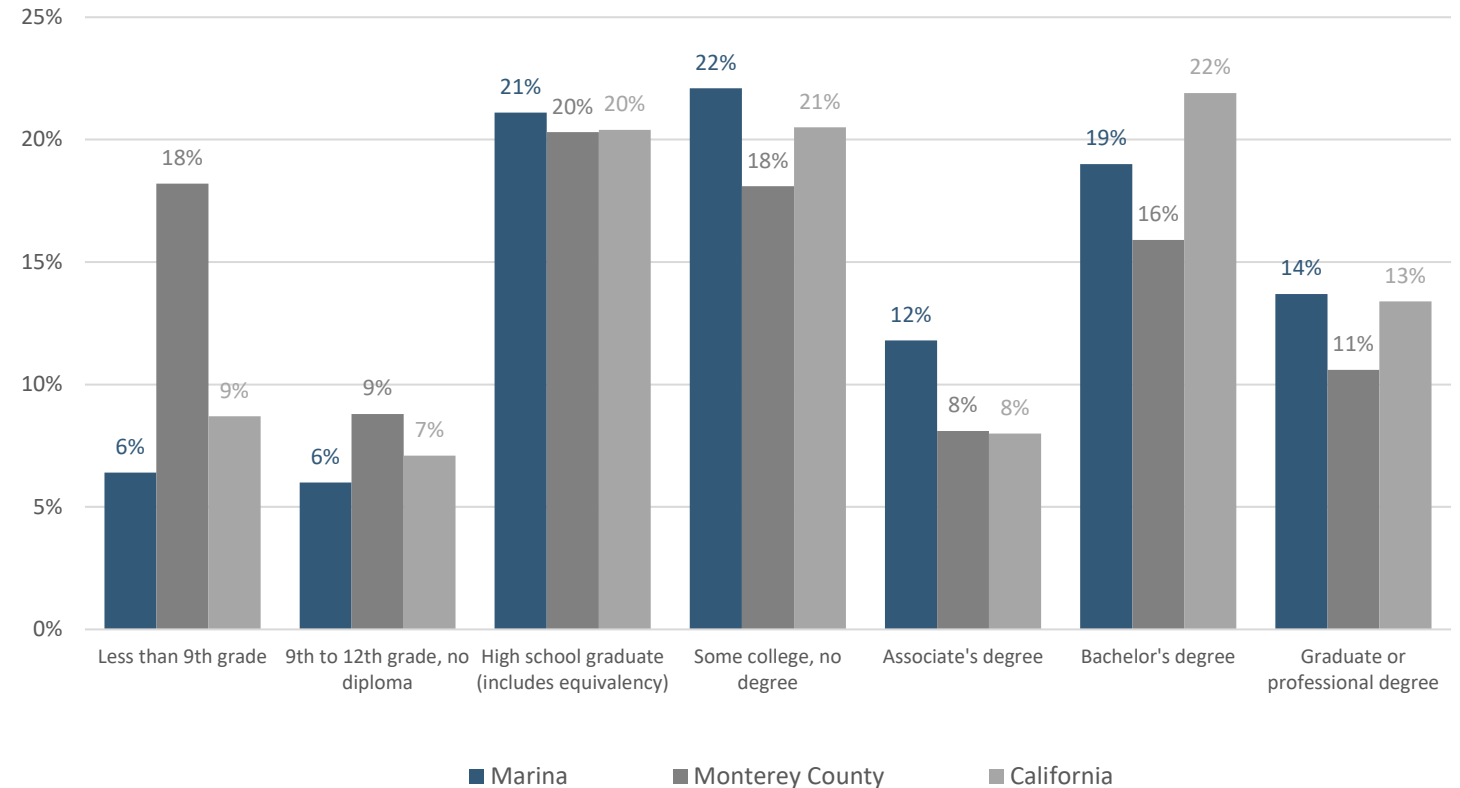
Item	2011	2016	2021	2011 - 2021		
				Change	Ann. Growth Rate	Total Pct. Change
Marina	\$64,377	\$64,759	\$78,795	\$14,418	2.0%	22.4%
Monterey County	\$74,217	\$69,014	\$82,013	\$7,796	1.0%	10.5%
California	\$76,571	\$72,294	\$84,097	\$7,526	0.9%	9.8%

*All values shown are in inflation-adjusted 2021 \$\$.

Source: American Community Survey, 2011-2021 DP03; BLS CPI; Economic & Planning Systems

Educational Attainment

- The city is generally more educated compared to the countywide average.
- Marina is more connected to the county's urban economy than its agricultural economy
- Notably, the City has attracted technology sector jobs in recent years



Source: American Community Survey, 2021 5-Year Estimates S1501

Commuting Patterns

- Nearly 75% of residents work in adjacent cities (Salinas, Seaside, Monterey, Carmel, Pacific Grove, or Prunedale) and only 20% of residents work in Marina.
- Marina has had a historically low job-to-housing ratio, due in part to the fact that the City has been a bedroom community to the former Fort Ord, Monterey and San Jose areas.
- Overall, 93% of residents work in Monterey County and only 7% work outside County.
- Nearly half of workers have a commute under 20 minutes and the average commute time is 25 minutes. However, the peak AM and PM traffic to and from jobs on the Peninsula is frequently longer.

Jobs

- There are approximately 6,500 jobs in Marina.
- There are a total of 10,512 employed residents in the City.
- There are fewer jobs than employed residents.
- Over the years, jobs in accommodations, retail, and construction have expanded
- New jobs possible through Joby at the airport
- The imbalance in jobs to housing ratio leads to longer commutes and worsening traffic conditions.

Description	Marina		Monterey County		California	
	#	%	#	%	#	%
Total Jobs ¹	6,491	100%	183,319	100%	18,289,820	100%
<u>Jobs (in City) by NAICS Industry Sector²</u>						
Agriculture, Forestry, Fishing and Hunting	0	0%	39,180	21%	355,562	2%
Mining, Quarrying, and Oil and Gas Extraction	0	0%	85	0%	21,964	0%
Utilities	200	3%	1,596	1%	124,147	1%
Construction	859	13%	7,775	4%	989,247	5%
Manufacturing	305	5%	5,413	3%	1,475,612	8%
Wholesale Trade	182	3%	6,593	4%	772,952	4%
Retail Trade	1,012	16%	15,344	8%	1,696,385	9%
Transportation and Warehousing	38	1%	3,716	2%	730,345	4%
Information	45	1%	1,219	1%	697,764	4%
Finance and Insurance	41	1%	2,448	1%	606,256	3%
Real Estate and Rental and Leasing	56	1%	1,993	1%	320,319	2%
Professional, Scientific, and Technical Services	113	2%	6,294	3%	1,480,600	8%
Management of Companies and Enterprises	6	0%	1,848	1%	308,061	2%
Administration & Support, Waste Mgmt & Rem.	521	8%	7,969	4%	1,155,455	6%
Educational Services	608	9%	17,957	10%	1,593,555	9%
Health Care and Social Assistance	736	11%	20,972	11%	2,540,963	14%
Arts, Entertainment, and Recreation	213	3%	2,789	2%	372,726	2%
Accommodation and Food Services	1,207	19%	21,992	12%	1,635,545	9%
Other Services (excluding Public Administration)	101	2%	5,781	3%	574,929	3%
Public Administration	252	4%	12,355	7%	837,433	5%
Total Jobs	6,491	100%	183,319	100%	18,289,820	100%

[1] ACS 2021 5-Year Estimates Table B08604

[2] Percentages per LEHD OnTheMap 2019 Data, values applied to Total Job count to derive job by industry values.

Source: Census; LEHD; Economic & Planning Systems

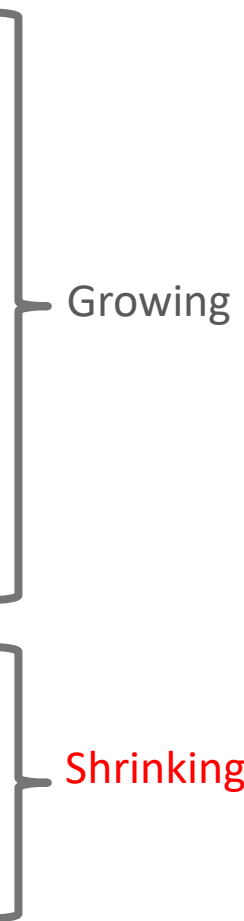
Employment Trends

- Marina’s employment base is shifting toward a more consumer-focused economy with significant growth in hospitality and retail sectors over the past decade, driven in part by the thriving tourism industry in the broader Monterey Bay area.
- Between 2002 and 2019, retail trade increased by 182%* and Accommodation and Restaurants increased by 105%.*
- Current employment growth is in lower wage sectors.

**Percent change in citywide “primary job” base in specified NAICS industry from 2002 to 2019 (per LEHD)*

Marina Primary Job Growth by Industry, 2002 - 2019

Description	'02 - '19 Change Jobs Added
<u>Jobs (in City) by NAICS Industry Sector</u>	
Retail Trade	435
Accommodation and Food Services	411
Health Care and Social Assistance	294
Construction	158
Educational Services	155
Arts, Entertainment, and Recreation	104
Manufacturing	104
Wholesale Trade	51
Utilities	47
Public Administration	26
Information	22
Management of Companies and Entrps.	4
Finance and Insurance	2
Mining, Quarrying, and Oil and Gas Ext.	0
Real Estate and Rental and Leasing	-8
Professional, Scientific, and Technical Svcs.	-26
Transportation and Warehousing	-32
Agriculture, Forestry, Fishing and Hunting	-96
Admin. & Support, Waste Mgmt & Rem.	-261
Other Services (excluding Public Admin.)	-269

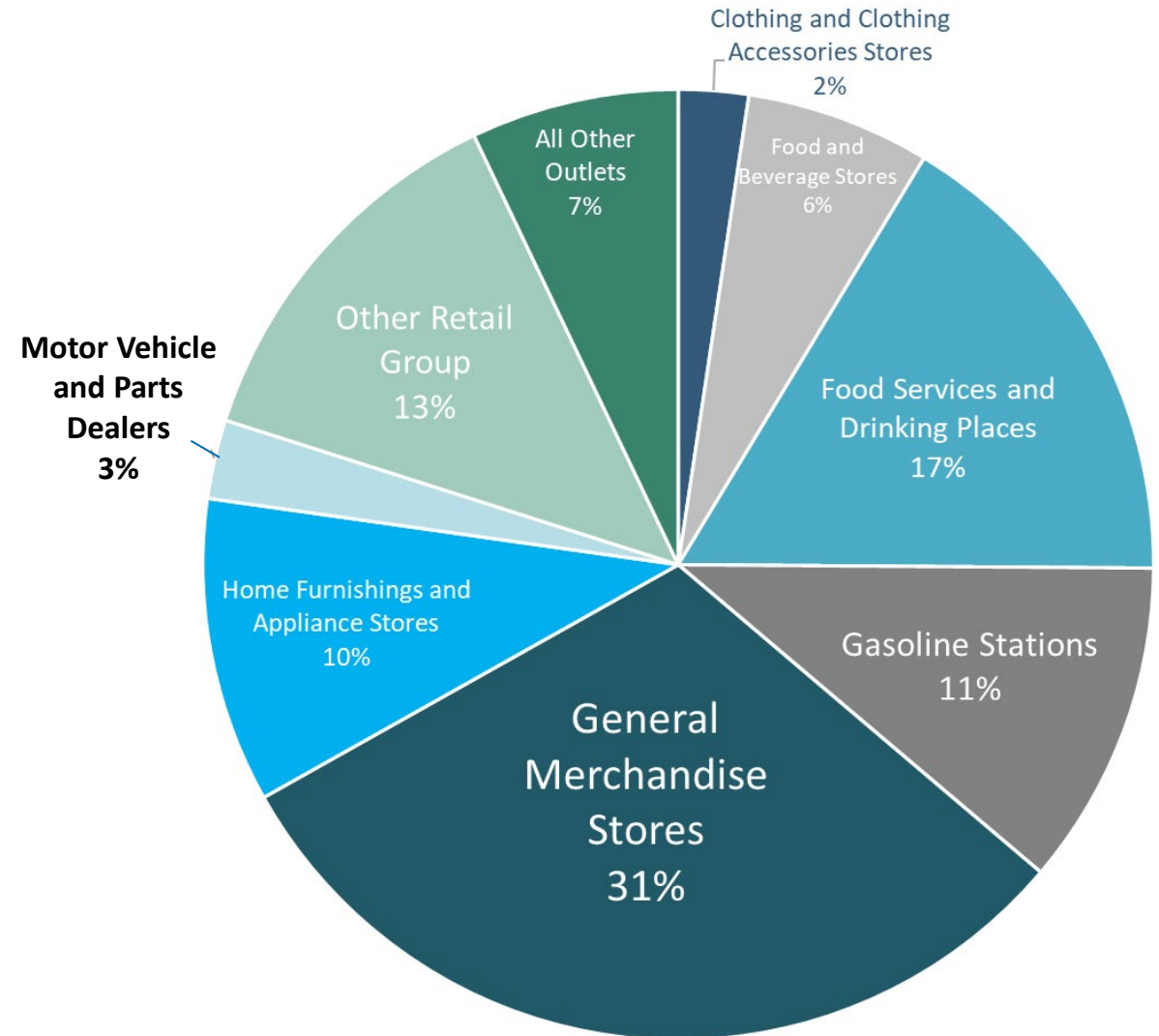


Source: LEHD; Economic & Planning Systems

Retailers

- The largest source of retail sales tax generation in Marina comes from General Merchandise stores, such as Target and Kohl's, and with recent development of a new center at the Dunes, the city's retail offerings are contributing to Marina's emergence as a regional shopping destination.
- Specifically:
 - A 234,000-sq. ft. major big box center was added in 2007 at The Dunes)
 - Retail is anchored by Target, Kohls, and Michael's
 - An additional 77,000 sq. ft. added since 2014

Marina Taxable Retail Sales Categories, 2021

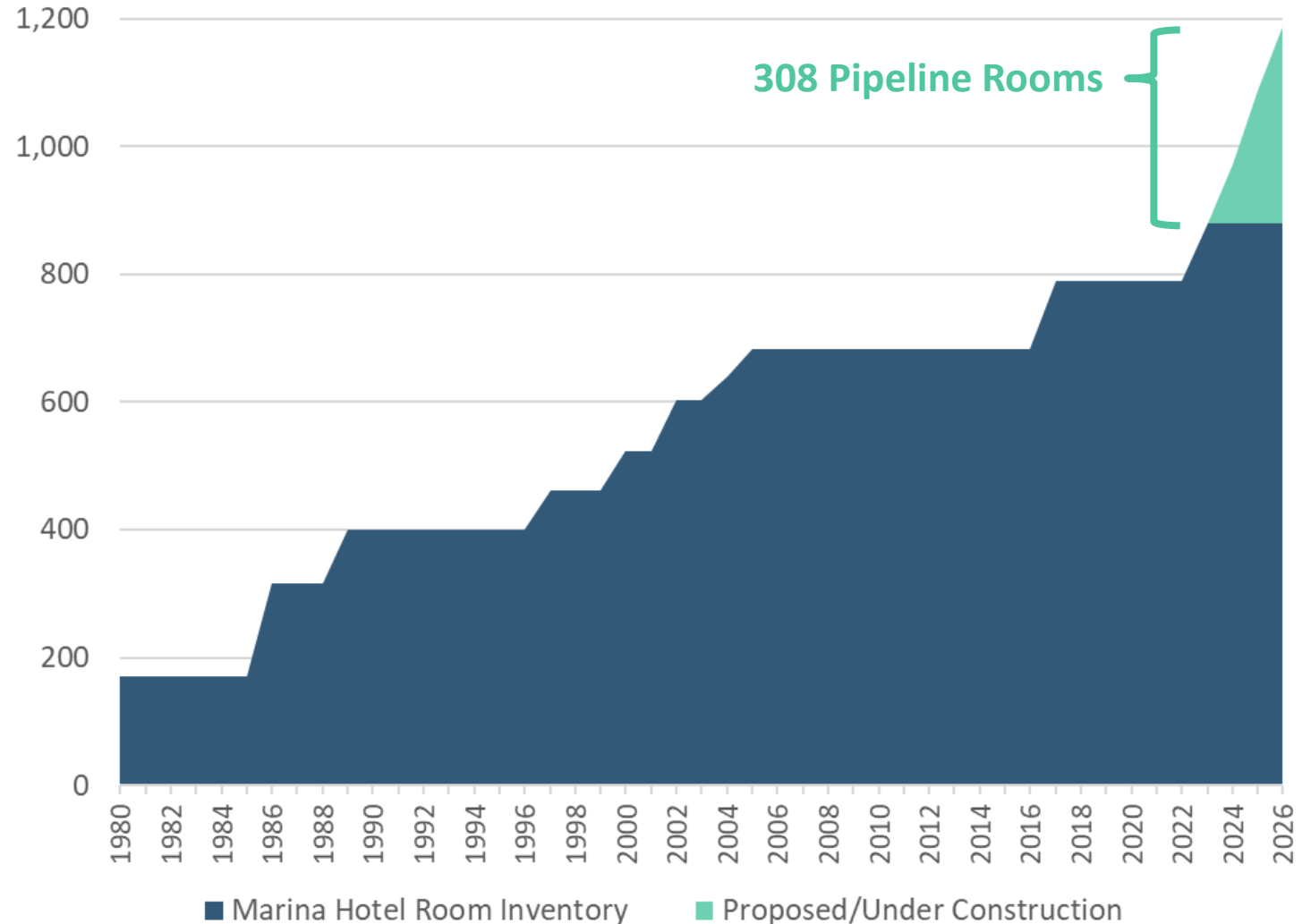


Source: California Department of Tax and Fee Administration

Hotel Market

- Marina is emerging as an increasingly attractive location for hotel developers, with two hotels built since 2017 and three more in the pipeline.
- By 2026, Marina is positioned to have increased its hotel room inventory by 50 percent over the span of a decade.

Marina Citywide Existing and Pipeline Hospitality Room Inventory, 1980-2026



Source: CoStar Group

Key Findings & Opportunities

Key Findings and Opportunities

- Development within a significant area of the City (25% of total parcel acreage) is regulated by an adopted Specific (or Master) Plan. This does not include the anticipated specific plan for Cypress Knolls.
- A significant portion of the City is vacant (almost a quarter). However, a major vacant area known as Marina Station is about to be developed.
- Commercial floor area ratios (a measure of intensity) are quite low across the city; the median FAR is 0.25 which corresponds to single-story strip mall-type land use patterns.
- The City has a high proportion of multi-family households with more than one-third of existing units, and over 60% of households are renter-occupied.
- In recent years, Marina has built significant numbers of single-family homes, in absolute numbers but especially compared to neighboring cities.
- Recent development has been almost exclusively small-lot, single-family housing, with very few apartments or mixed-use projects.

Key Findings and Opportunities Continued

- Marina has become an increasingly attractive location for hotels, with 2 built recently and 3 in the pipeline.
- Aside from hotels and recent airport activity, Marina has experienced minimal non-residential development in recent years.
- Total entitled and planned residential growth in the City's three major adopted specific plans is far greater than the growth projected by AMBAG through 2045.
- There are several opportunities for stronger gateway treatments at specific locations entering and leaving the city.
- AMBAG projects growth of 8,500 new residents over the next two decades, with an estimated population of 30,000 by 2045. Two-thirds of these new residents would be CSUMB students (under this projection).
- Marina's demographics skew toward a younger, relatively well-educated population, but incomes are still lower than neighboring municipalities.